2024 Product Roadmap:
Building Efficiency, Compliance, Scalability, & Consolidation
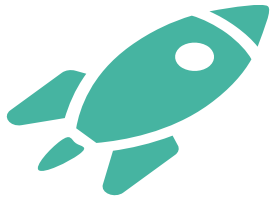
User Security
Grant Maker Training
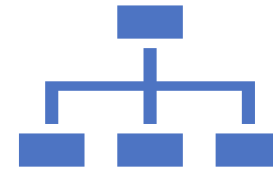
AmpliFund

AGENDA

- Launch & User Role Migration

- New Security Model

- Create / Edit User

- User Personas

- Q&A

LAUNCH & USER MIGRATION

Launch date

11/16

User roles:

Current	New
Org Admins	Admin, Account level
Executives	View, Account level
Department Admin	Admin, Department level
Department User Salary	User, Department
Department User No Salary	User, Department (with Salary restriction)
Fund Admin	Admin, Fund; Admin, Awards; Admin, Opportunities
Fund User Salary	User, Fund; User, Awards; User, Opportunities
Fund User No Salary	User, Fund; User, Awards; User, Opportunities (with Salary restriction)

NEW USER SECURITY MODEL OVERVIEW

Goal: Increase control, flexibility and compliance over user access, encourage further use of the unlimited user model to promote synergy in grant management.

Features:

- New role types

- Accessed assigned at the object level

- Advanced viewing restrictions

- More robust record permissions

- Continued ability to assign workflow actions & tasks outside assigned access

NEW ROLES

- Admin - Can view, create, edit, delete and approve selected records
- Editor - Can view and edit record, and can assign users
- User - Can view records, can document progress against budget and performance
- View Only - Can view records

OBJECT LEVELS

| Account | Applications | Awards | Departments | Funds | Opportunities |

ADVANCED RESTRICTIONS

- Approvals (Payment Requests, Amendments, Reporting Periods)

- Budget

- Payment Authorizations

- Post-Award

- Salary

RECORD PERMISSIONS
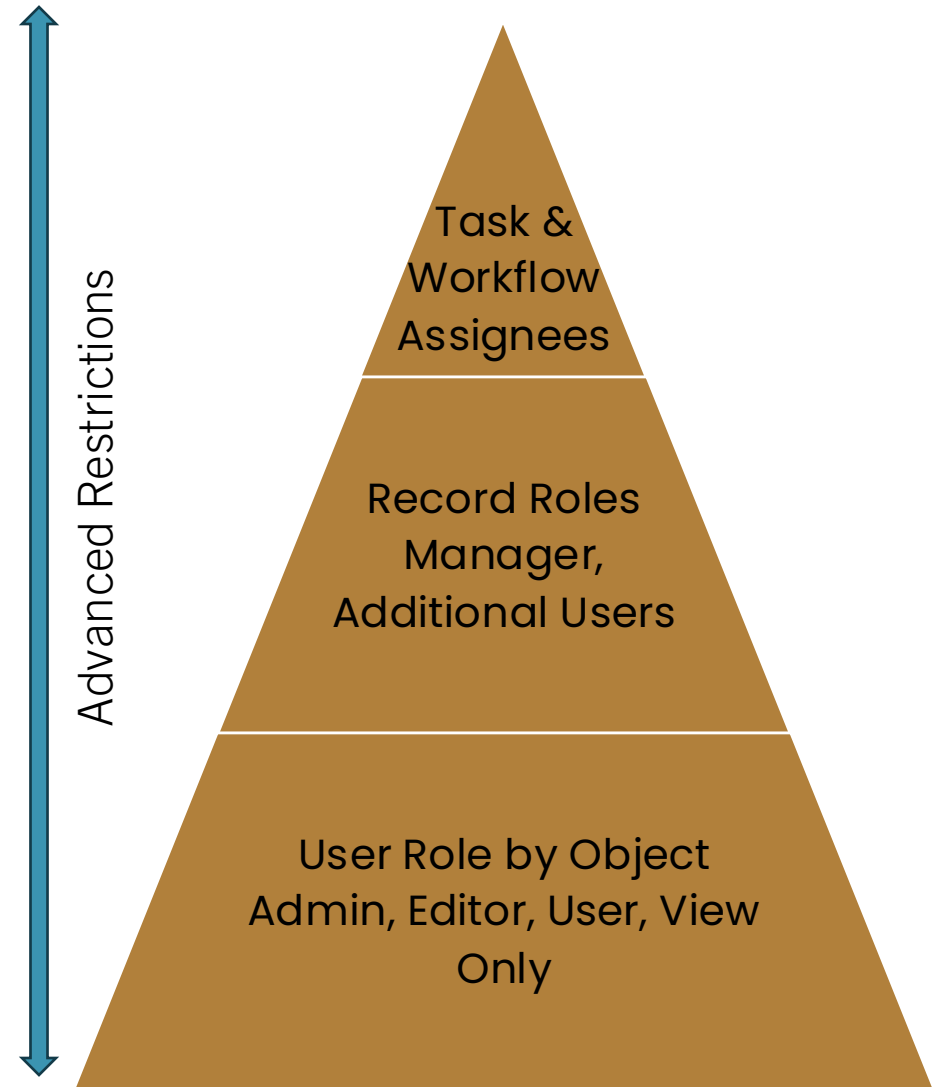
Pull from users list (rather than staff)

No longer required

Additional users supports multiple selection

Revised titles for clarity

Object	Old Role	New Role
Opportunities	Opportunity Manager	Manager
Opportunities	n/a	Additional Users
Funds	Fund Manager	Manager
Funds	Additional Staff	Additional Users
Awards	Responsible Person	Funder Additional Users
Awards	Grant Manager	Funder Manager
Awards	Recipient Grant Manager	Manager
Awards	n/a	Additional Users
Budget Item	Responsible Individual	Assignee
Performance Goal	Responsible Individual	Assignee
Tasks	Responsible Individual	Assignee

PUTTING IT ALL TOGETHER

Advanced Restrictions

Task & Workflow Assignees

Record Roles Manager, Additional Users

User Role by Object Admin, Editor, User, View Only

IN PRODUCT REVIEW

Create User

Edit User

USER PERSONA #1 – FINANCE FIONA

Fiona is:

- Creates funds & monitors fund balances
- Refers to opportunities for information, not involved in set-up, reviewing or awarding
- Not involved with recipient budgets
- Accesses payment requests but cannot approve
- Creates payment authorizations

Fiona's user access:

- Funds=Admin
- Awards=Editor
- Opportunity=View Only
- Advanced Restrictions=Budget, Approvals

USER PERSONA #2 – APPLICATION ABBY

Abby is:

- Publishes opportunities
- Creates awards via workflow
- Not involved in post-award monitoring

Abby's user access:

- Funds=View Only
- Opportunities=Admin
- Applications=Admin
- Awards=User
- Advanced Restrictions= Approvals, Payments, Post-Award

USER PERSONA #3 – REVIEWER ROBERT

Robert is:

- Part of the review team for a few opportunities

Robert's user access:

- Object types=none
- Assigned to workflow queue to complete scoring

USER PERSONA #4 – POST-AWARD PATRICK

Patrick is:

- Involved in post-award monitoring
- Approves payment requests
- Reviews performance reporting
- Not involved in payment authorization process
- Not involved in pre-award but might need access to view

Patrick's user access:

- Applications=View Only
- Awards=Editor
- Funds=View Only
- Opportunities=View Only
- Advanced Restrictions=Payment Authorizations

USER PERSONA #5 – ACCOUNT ADAM

Adam is:

- The organizations SME for AmpliFund
- Supports all teams in all steps of AmpliFund
- Should not be able to create payment authorizations

Adam's user access:

- Account=Admin
- Advanced Restrictions=Payment Authorizations

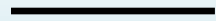# USER PERSONA #6 — PAYMENT PROCESS PAULA

Paula is:

- Responsible for reviewing payment requests
- Adds review confirmation via custom field on payment requests
- Does not have authority to approve payment requests

Paula's user access:

- Award=Editor
- Advanced Restrictions=Approvals

IN PRODUCT REVIEW

User persona comparison