

# AmpliFund Security Roles Guide

AmpliFund offers a variety of security roles so that you can ensure your users only see what they need to see. Some security roles may not be applicable to your organization based on your account subscription and modules. Add-on modules are designated by an asterisk (\*).

## Explicit Security Roles

Explicit security roles are attached to the user role and can be selected in *Administration>System Security>Users*.

### Organizational Administrators

Organizational Administrators have the highest level of security and can create, view, and edit all records in the account, including Staff compensation information. Organizational Administrators are the only users that can create, view, and edit records in the Administration module. The Administration module includes License Information, Account Settings, Lead and Sub-Recipients\* management, Workflow\* management, System Security and user management, and Lists and Actuals management and import. There is no limit to the number of Organizational Administrators you can have per account.

### Executives

Executives can view all records in the account, including Staff compensation information, but cannot add or edit any records. Executive users can also run all organizational reports and view the License Information section in the Administration module.

### Department Administrators

Department Administrators can create, view, and edit all grant and project\* records linked to their department(s), including running associated reports. They cannot run sub-award reports.

### Department Users

Department Users can add achievements and expenses that are assigned to them. In addition, they can view all grant and project\* records linked to their department(s), including running associated reports. They cannot run sub-award reports. Department Users are classified as Salary or No Salary. Department Users (No Salary) cannot create, view, or edit personnel line items on a grant's budget.

### Project Administrators

***For clients with the Project Management module***

Project Administrators can create, view, and edit all project\* records. In addition, Project Administrators can view all grants related to their projects. They cannot run reports.

## Project Users

### ***For clients with the Project Management module***

Project Users can add achievements and expenses assigned to them and can view and edit all projects\* assigned to them. They can also view any grants linked to their projects. Project Users can create new projects. Project Users are classified as Salary or No Salary. Project Users (No Salary) cannot create, view, or edit personnel line items on a grant's budget. They cannot run reports.

## Fund Administrators

### ***For clients with the Fund Management module***

Fund Administrators can create, view, and edit all fund\*, opportunity\*, and award\* records. They cannot run reports.

## Fund Users

### ***For clients with the Fund Management module***

Fund Users can view and edit any assigned fund\*, opportunity\*, and award\* records. Fund Users are classified as Salary or No Salary. If assigned to a grant, Fund Users (No Salary) cannot create, view, or edit personnel line items on a grant's budget. They cannot run reports.

## Researchers

### ***For clients with the Grant Research module***

Researchers only have access to the Research\* module. Researchers cannot apply for or manage grants.

# Implicit Security Roles

Implicit security roles are additional security permissions that are given to a user for a specific record. For example, Grant Additional staff will have additional permissions for the grant record beyond their explicit security role. These roles can be selected on the object record.

## Fund Additional Staff

### ***For clients with the Fund Management module***

Additional Staff may view fund details, cash receipts, performance plans, budget plans, opportunities (for clients with the Competitive Award Management module), and awards. They cannot create, edit, or delete fund details, and other fund-related information.

## Fund Managers

### ***For clients with the Fund Management module***

Fund Managers have full access to edit fund details, and create, edit, and delete all items related to the fund they are managing. These users may also assign responsibility for goals and line items to other AmpliFund users.

## Funder Grant Managers

### ***For clients with Recipient Access Licenses***

Funder Grant Managers have full access to edit grant details, and create, edit, and delete all items related to their awarded grant, including running reports. The Funder Grant Manager may also assign responsibility for goals and line items to the Recipient Grant Manager. From there, the Recipient Grant Manager can reassign responsibility to others in their organization.

## Grant Additional Staff

Additional Staff may view grant details, performance plans, and budget plans. They cannot create, edit, or delete grant details, goals, or line items. Additional Staff can run reports related to their grant.

## Grant Managers

Grant Managers have full access to edit grant details, and create, edit, and delete all items related to their grant, including running reports. These users may also assign responsibility for goals and line items to other users.

## Grant Writers

Grant Writers may view grant details, performance plans, and budget plans. They cannot create, edit, or delete grant details, goals, or line items.

## Opportunity Managers

### ***For clients with the Fund Management module or Competitive Award Management module***

Opportunity Managers have full access to edit opportunity details, and create, edit, and delete all items related to their opportunity, including running reports. This includes application forms, budget and performance plan templates. Additionally, Opportunity Managers may enroll opportunities and applications in workflows.

## Project Additional Staff

### ***For clients with the Project Management module***

Additional Staff may view project details, performance plans, and budget plans. They cannot create, edit, or delete project details, and other project-related information.

## Project Managers

### ***For clients with the Project Management module***

Project Managers have full access to edit project details, and create, edit, and delete all items related to the project they are managing. These users may also assign responsibility for goals and line items to other AmpliFund users.

## Recipient Grant Managers

Recipient Grant Managers have full access to edit grant details, and create, edit, and delete all items related to their grant, including running reports. These users may also assign responsibility for goals and line items to other users.

## Responsible Individuals

Responsible Individuals are responsible for overseeing a performance goal or line item's completion. These users have visibility on their grants.

## Funder Responsible Persons

### ***For clients with Recipient Access Licenses***

Funder Responsible Persons are responsible for overseeing an awarded grant. These users can edit award details, performance plan settings, and budget settings, and can view items related to their award. They cannot view budget or expenses.