SECURITY SCENARIOS IN AMPLIFUND

When adding users to your AmpliFund organization you need to choose a security role for the user. We will define each Role later in this document, but first we'll review some **common scenarios** and give suggestions on how to use security roles in each scenario.

SCENARIOS

Single Grant with Unrestricted Access

For a small organization that only needs to manage a single MBCC grant in AmpliFund, the simplest security scenario is to set the security role for **all users** to Organization Admin. Each user will have full access to the grant.

Multiple Grants with Unrestricted Access

For organizations that have multiple grants with MBCC, you may need to add several users to your organization to include all personnel working on all grants. If your organization decides it is **acceptable** for each user to have full access to each grant, then the simplest security approach is to set the security role for **all users** to Organization Admin.

Restricted Access – Single or Multiple Grants

If your organization decides that it is **not acceptable** for each AmpliFund user to have full access to each grant, then you will need a more complex security approach.

- For users who should have full access to every MBCC grant, set their security role to Organization Admin.

- For users who should have **view-only** access to every grant (i.e. board member, county commissioner), set their security role to Executive.

- For other users in your organization, set their security role to Department Users (Salary).

- Users with the explicit security role Department Users (Salary) **will not have any access** to grants until they are given an implicit security role on a specific grant or an item within a specific grant.

- Set implicit security roles:

  - The Recipient Grant Manager security role on a grant has full access to the grant and is normally assigned to a project director or project manager. **Only one user** can be assigned to this role for each grant.

  - The Responsible Persons on a budget line item or performance plan goal can perform tasks necessary to complete that item, but they **do not have access** to the grant. Multiple users can be assigned to different budget line items and performance plan goals.

If the above approach does not meet your needs, then it is possible to create a more sophisticated approach in AmpliFund by setting **Departments** for users and grants. Please see the AmpliFund support site for information.

AMPLIFUND SECURITY ROLE DEFINITIONS

Explicit Security Roles

When creating or editing a User in *Administration>System Security>Users*, you will set that user's **explicit** security role.

Organizational Administrators

Organizational Administrators have the highest level of security and can create, view, and edit all records in the account. Organizational Administrators are the **only users** that can create, view, and edit records in the Administration module.

Executives

Executives can view all records in the account but **cannot add or edit any records**.

Department Administrators

Department Administrators can create, view, and edit all grant records linked to their department(s). **MBCC recommends not using this role unless you have created departments in your AmpliFund account.**

Department Users (Salary)

Department Users (Salary) can add achievements and expenses that are assigned to them.

Department Users (No Salary)

Department Users (No Salary) can add achievements and expenses that are assigned to them **but cannot create, view, or edit Personnel line items on a grant's budget**.

Implicit Security Roles

Implicit security roles are additional security permissions that are given to a user for a specific type of object in AmpliFund. These permissions are **beyond their explicit security role**.

- On a Grant, a user given the **Recipient Grant Manager** role has full access to edit grant details, and create, edit, and delete all items related to the grant. These users may also assign responsibility for budget line items and performance goals to other users.

- On a budget line item in a grant's budget, a user given the **Responsible Person** role will be able to create expenses for that line item.

- On a performance plan goal, a user given the **Responsible Person** role will be able to create Achievements for that goal.

MBCC Security Roles

As a recipient, you can view the MBCC staff assigned to a grant.

Grant Manager (MBCC Program Staff)

MBCC Grant Managers have full access to edit grant details, and create, edit, and delete all items related to the grant.

Responsible Persons (MBCC Fiscal Staff)

MBCC Responsible Persons have full access to edit grant details, and create, edit, and delete all items related to the grant.