

Welcome to the

# Blackbaud Grantmaking SKY View User Role Permissions Guide

## Standard User Roles

Blackbaud Grantmaking has five standard user roles which may be assigned to a user profile, each role has a preset list of system permissions. The standard roles in order of system access are:

- Client Administrator
- Grants Manager
- Program Officer
- Grants Associate
- View Only / Board Member

The permissions by role are:

Backend Permission	Permission Description	Client Admin	Grants Manager	Program Officer	Grants Associate	View Only / Board Member
Organization Add	Create a New Organization Record	X	X	X	X	
Organization Update	Update/Edit an Existing Organization Record	X	X	X	X	
Organization Delete	Delete an Existing Organization Record	X	X			
Organization Tax Status Update	Perform Tax Status Look-Up / Verification	X	X	X	X	
Organization Coding Sheet Update	Update an Organization's Coding Sheet Fields	X	X	X	X	
Pending Requests Add	Create a New Pending Request Record	X	X	X	X	
Pending Requests Update	Update/Edit an Existing Pending Request Record	X	X	X	X	
Pending Requests Delete	Delete an Existing Pending Request Record	X	X	X	X	
Declined Requests Update	Update/Edit an Existing Declined Request Record	X	X	X	X	
Declined Requests Delete	Delete an Existing Decline Request Record	X	X			

<b>Approved Requests Update</b>	Update/Edit an Existing Approved Request Record	X	X	X	X	
<b>Approved Requests Delete</b>	Delete an Existing Approved Request Record	X	X			
<b>Approved Requests Coding Sheet Update</b>	Update an Existing Approved Request's Coding Sheet Fields	X	X	X	X	
<b>Approved Requests Payments Add</b>	Add Payments to an Approved Request	X	X	X	X	
<b>Approved Requests Payments Update</b>	Update Payments on an Approved Request	X	X	X	X	
<b>Approved Requests Payments Delete</b>	Delete a Payment from an Approved Request	X	X			
<b>Approved Requests Requirements Add</b>	Add Requirements to an Approved Request	X	X	X	X	
<b>Approved Requests Requirements Update</b>	Update Requirements on an Approved Request	X	X	X	X	
<b>Approved Requests Requirements Delete</b>	Delete a Payment from an Approved Request	X	X			
<b>Contacts Add</b>	Create a New Contact Record	X	X	X	X	
<b>Contacts Update</b>	Update/Edit an Existing Contact Record	X	X	X	X	
<b>Contact Delete</b>	Delete an Existing Contact Record	X	X			
<b>Activities Add</b>	Create a New Activity Record	X	X	X	X	
<b>Activities Update</b>	Update/Edit an Existing Activity Record	X	X	X	X	
<b>Activities Delete</b>	Delete an Existing Activity Record	X	X			
<b>Affiliations Add</b>	Create a New Affiliation Record	X	X	X	X	
<b>Affiliations Update</b>	Update/Edit an Existing Affiliation Record	X	X	X	X	
<b>Affiliations Delete</b>	Delete an Existing Affiliation Record	X	X			
<b>Wire Transfer Information View</b>	View Wire Transfer Information (Org, Request, Payment)	X	X		X	
<b>Wire Transfer Information Add</b>	Add New Wire Transfer Information (Org, Request, Payment)	X	X		X	
<b>Wire Transfer Information Update</b>	Update Existing Wire Transfer Info (Org, Request, Payment)	X	X		X	
<b>Wire Transfer Information Delete</b>	Delete Existing Wire Transfer Info (Org, Request, Payment)	X	X			
<b>Public Saved Searches Add</b>	Create a New Saved Search for All Users	X	X	X	X	X
<b>Public Saved Searches Update</b>	Update a Saved Search for All Users	X	X	X	X	X

<b>Public Saved Searches Delete</b>	Delete a Saved Search for All Users	X	X	X	X	
<b>Public Saved Views Add</b>	Create a New Saved View for All Users	X	X	X	X	X
<b>Public Saved Views Update</b>	Update a Saved View for All Users	X	X	X	X	X
<b>Public Saved Views Delete</b>	Delete a Saved View for All Users	X	X	X	X	
<b>Letter Template Add</b>	Create a New Letter Template (Requires Additional Permissions)	X	X	X	X	
<b>Letter Template Update</b>	Update an Existing Letter Template (Requires Additional Permissions)	X	X	X	X	
<b>Letter Template Delete</b>	Delete an Existing Letter Template (Requires Additional Permissions)	X	X	X	X	
<b>Approve Request</b>	Approve a Request	X	X	X		
<b>Decline Request</b>	Decline a Request	X	X	X		
<b>Amend Request</b>	Amend the Grant Amount on an Approved Request	X	X			
<b>Mark Payment Paid</b>	Mark a Payment as Paid	X	X			
<b>Void Payment</b>	Void a Paid Payment	X	X			
<b>Place Payment on Hold</b>	Place a Payment on Hold	X	X			
<b>Mark Requirement Done</b>	Mark a Requirement as Done (Complete)	X	X	X	X	
<b>Run Reports</b>	Generate Standard and / or Ad Hoc Reports	X	X	X	X	X
<b>Generate Correspondence</b>	Generate Email and / or Letter Correspondence & Write-ups	X	X	X	X	X
<b>The following Permissions all Require the Accounts Payable Module</b>						
<b>Export Payments</b>	Export Payments to an Accounts Payable Format (Requires A/P Module)	X	X			
<b>Import Payments</b>	Import Updates to Payments from an Accounts Payable System (Requires A/P Module)	X	X			
<b>End of Accounts Payable Permissions</b>						
<b>Requested Amount Update</b>	Update the Requested Amount Field	X	X	X	X	
<b>Recommended Amount Update</b>	Update the Recommended Amount Field	X	X	X	X	
<b>Approved Amount Update</b>	Update the Grant Amount Field	X	X	X	X	

<b>Project Title Update</b>	Update the Project Title Field	X	X	X	X	
<b>Staff Override</b>	Allows editing/access of locked records for non-assigned users	X				
<b>Request Change Status</b>	Ability to Update the Request Status Field	X	X	X	X	
<b>Request Rollback to Pending</b>	Roll a Declined or Approved Request back to Pending	X	X	X		
<b>System Activities Update</b>	Update a System Activity Record	X	X	X	X	
<b>System Activities Delete</b>	Delete a System Activity Record	X	X			
<b>Deleted Voided Payments</b>	Delete a Voided Payment Record	X	X			
<b>Request Grant Renewal</b>	Renew an Approved Request (which creates a new, related Pending Request)	X	X	X	X	
<b>Assign Edit Reference Numbers</b>	Update the Reference Number Field	X	X	X	X	
<b>Grant Amendment Activities Update</b>	Update an existing Grant Amendment Activity	X	X	X		
<b>Grant Amendment Activities Delete</b>	Delete an existing Grant Amendment Activity	X	X	X		
<b>Update Paid Payment Fiscal Year</b>	Update the fiscal year on Payment marked as Paid	X	X	X	X	
<b>Update Scheduled Payment Fiscal Year</b>	Update the fiscal year on Payment marked as Scheduled	X	X	X	X	
<b>Update Grant Fiscal Year</b>	Change the Fiscal Year on an Approved Request	X	X	X	X	
<b>Update Amendment Fiscal Year</b>	Change the Fiscal Year on an Approved and Amended Request	X	X	X	X	
<b>Lock Requests</b>	Block a Request from being Updated by other User	X	X	X		
<b>Unlock Requests</b>	Remove the Block on a Request being Updated	X	X	X		
<b>Delete Paid Payments</b>	Void a Paid Payment	X	X			
<b>Cancel Payments</b>	Cancel a Scheduled Payment	X	X			
<b>Include Documents</b>	Add a Document (external)	X	X	X	X	
<b>View Documents</b>	View Documents	X	X	X	X	X
<b>Remove Documents</b>	Remove/Delete a Document	X	X			
<b>Lock Documents</b>	Restrict an Existing Document from being Edited / Removed	X	X	X		
<b>Unlock Documents</b>	Remove Lock on an Existing Document	X	X	X		
<b>Edit All Documents</b>	Ability to Edit/Replace an Existing Document	X	X	X		
<b>The following Permissions all Require the Budget Module</b>						
<b>Budget Appropriate</b>	Ability to Appropriate Payments	X	X	X	X	

	to a Budget					
<b>Budget Transfer</b>	Transfer Funds when Appropriating a Payment to the Budget	X	X	X	X	
<b>Budget Create</b>	Create a New Fiscal Year Budget	X	X			
<b>Budget Update</b>	Update a Planning or Open Budget	X	X			
<b>Budget Delete</b>	Delete a Budget in Planning	X	X			
<b>Budget Administration</b>	Access to the Budget Designer (Required along with other Permissions)	X	X			
<b>Budget Allocate</b>	Allocate Budget Items in Planning	X	X			
<b>Budget Adjust</b>	Adjust Budget Items in an Open Budget	X	X			
<b>Budget Open</b>	Open a Fiscal Years Budget	X	X			
<b>Budget Close</b>	Close a Fiscal Years Budget	X	X			
<b>End of Budget Permissions</b>						
<b>The following Permissions all Require the Reviewers Module</b>						
<b>Reviewers Login</b>	Allows Access to the Reviewer Portal for Grantmaking Users	X	X	X	X	X
<b>Reviews Add</b>	Create /Assign Review to Reviewer Contacts	X	X	X	X	X
<b>Reviews Update</b>	Update an Existing Review	X	X	X	X	X
<b>Reviews Delete</b>	Delete an Existing Review	X	X	X		
<b>Approve Reviewed Request</b>	Approve a Request upon Completion of Review	X	X	X		
<b>Decline Reviewed Request</b>	Decline a Request upon Completion of Review	X	X	X		
<b>End of Reviewers Permissions</b>						
<b>Publish Requirements Add</b>	Publish an Existing Requirement to an Online Requirement Form	X	X	X	X	
<b>Publish Requirement Delete</b>	Remove a Published Online Requirement Form from an Existing Requirement	X	X	X	X	
<b>The following Permission Requires Branch Security</b>						
<b>Branch Transfer</b>	Transfer a Request from one Branch to another	X	X			
<b>End of Branch Security Permissions</b>						
<b>Batch Update</b>	Update Coding, Type/Status, Meeting Date, Project Description, Staff Assignment in the Workspace	X	X		X	
<b>Tax Status Lookup</b>	Search for Organizations using the IRS database that do not have an Existing Record	X	X	X	X	

<b>Tax Status Verify</b>	Verify the Tax Status of an Existing Organization Record	X	X	X	X	
<b>Execute Watchlist</b>	Run Watchlist/OFAC verification for Organizations and Contacts	X	X		X	
<b>The following Permissions all Require the Accounts Payable Module</b>						
<b>Manage Bank Accounts</b>	Set Up Bank Account Information	X	X			
<b>Produce Checks</b>	Generate Checks Using Template	X	X			
<b>End of Accounts Payable Permissions</b>						
<b>Configure Dashboards</b>	Create / Edit / Delete dashboard parts and dashboard pages	X	X		X	
<b>Share Dashboard</b>	Share dashboard pages with other like users	X	X		X	
<b>Reminders</b>	Add / Update / Delete automatic system reminders	X	X		X	
<b>Manage Report Defaults</b>	Set system defaults for Ad Hoc report design	X	X			
<b>Blueprint</b>	Access to Blueprint functionality including custom fields, fields library and forms library	X	X			
<b>Public Saved Report Definition Templates Add</b>	Create a New Public (Shared) Saved Report	X	X		X	
<b>Public Saved Report Definition Templates Update</b>	Update any Existing Public (Shared) Saved Report (created by any user)	X	X		X	
<b>Public Saved Report Definition Templates Delete</b>	Delete any Existing Public (Shared) Saved Report (created by any user)	X	X			
<b>Transfer Requests</b>	Transfer a Request to another Grantee Account	X	X	X	X	
<b>Transfer Requirements</b>	Transfer a published requirement to another Grantee Account	X	X	X	X	
<b>Report Schedules Access Own</b>	Add/Update/Delete scheduled reports created by you	X	X	X	X	X
<b>Report Schedules Access All</b>	Add/Update/Delete scheduled reports created by others	X	X		X	
<b>Publish Application Resubmission</b>	Resubmit an existing submitted request back to applicant to update	X	X		X	
<b>Publish Requirement Resubmission</b>	Resubmit an existing submitted requirement back to applicant to update	X	X		X	
<b>The following Permissions all Require the Reviewers Module</b>						
<b>Bypass Review</b>	Skip a reviewer in a Sequential	X	X		X	

	review process					
<b>Allow Resubmit Review</b>	Resubmit a completed review back the Reviewer to be revised	X	X		X	
<b>Forward Review</b>		X	X		X	
<b>End of Reviewers Permissions</b>						
<b>Administration Classifications</b>	Manage system codes and coding sheets	X				
<b>Administration Template Manager</b>	Access document template manager to create/edit/delete email and printed templates	X				
<b>Administration System Preferences</b>	Set link to outlook defaults, reminders default and set reference number	X				
<b>Administration Auditing</b>	Audit trail information	X				
<b>Administration Reviews</b>	Administration review stages, committees, rules and global notifications	X				
<b>Administration Dashboards</b>	Edit/Create/Delete/Share dashboard and dashboard parts	X				
<b>Online Applications Manage Applications</b>	Manage and retrieve applications	X	X		X	
<b>Online Applications Retrieve Requirements</b>	Retrieve Requirements	X	X		X	
<b>Online Applications Manage Forms</b>	Access to forms manager	X	X		X	
<b>Online Applications Historical Applications</b>	View historical applications including rejected	X	X		X	
<b>Online Applications Reset Grantee Password</b>	Reset Grantee Account password	X	X		X	
<b>Online Applications Transfer Account</b>	Transfer grantee account between grantees	X	X		X	
<b>Online Applications Publish Status</b>	Visibility of the 'Publish Status' option in the Request or Payment Edit Form and Workspace Action Ribbon Menus.	X	X		X	
<b>Online Applications Forms Activate</b>	Activate a form in the Forms Manager	X	X		X	
<b>Online Applications Forms Deactivate</b>	Deactivate a form in the Forms Manager	X	X		X	
<b>Online Applications Forms Delete</b>	Archive a Form in the Forms Manager and for them to Restore an archived form	X	X		X	
<b>Online Applications Generate Stage 2</b>	Generate a Stage 2 application	X	X		X	