

AMPLIFUND CORE SERIES

TRAINING 2:

Grants Overview

Agenda

- Welcome and Introductions
- Master Data Revisit
- Functionality
 - Grant Details
 - Tools
 - Activity Center
 - Reports and Custom Views
- Key Takeaways and Action Items
- Question and Answer

Core Series Overview

- Training 1: Introduction to AmpliFund and Research
-  • Training 2: Grants Overview
- Training 3: Performance Plan Creation and Achievement Entry
- Training 4: Budget Creation and Expense Entry
- Training 5: Master Data

Master Data Revisit

Setting up master data elements that have a major role in grant creation:

- **Organizations**
 - Includes your grantors/funders, vendors, and partner organizations
- **Staff**
 - People at your organization who can receive AmpliFund emails and may be assigned responsibility for items
- **Subjects**
 - Provides a means to tag a grant record with key words
- **Departments**
 - Internal departments or programs at your organization, related to security roles and settings

Master Data Elements

Data Element	Grants	Performance Plans	Budgets / Expenses
Organizations	✓		
Individuals			
Staff	✓	✓	✓
Compensation			✓
Subjects	✓		
Budget Categories			✓
Benefit Types			✓
Departments	✓		
GL Accounts			✓

Grant Details

Add basic information such as:

- Grant Name
- Grantor Organization
- Key Grant Dates
- Award Status
- Key Staff Involved
- Pre- and Post- Award Budgets
- Grant Financial Code
- Tracking Periods

Tools

- Email Manager
- Tasks
- Documents
- Notes

**Tools are available on
several record types:**

Organizations
Individuals
Staff
Grants

The screenshot displays the AmpliFund Full Cycle web application interface. The left sidebar contains a navigation menu with the following items: Activity, Contacts, Grant Management (highlighted), Research, Grants, Grants Awarded, Views, Documents, Reports, and Knowledge Center. The main content area shows the details for a grant titled "Active Living: Bicycle and Walking Trails". The "Tools" dropdown menu is open, showing options: Email Manager, Tasks, Documents, and Notes. The grant information section includes fields for Name, Grantor, RFP ID Number, Funding Opportunity Number, and CFDA Number. The Pre-Award section includes fields for Letter Of Intent Required, Proposed Length Of Award, Proposal Open Date, Proposal Close Date, Proposal Submitted Date, Projected Receipt Date, Grant Writer(s), Department(s) or Program(s), and Subject(s).

Grant Information	
Name	Active Living: Bicycle and Walking Trails
Grantor	Interact for Health
RFP ID Number	
Funding Opportunity Number	
CFDA Number	

Pre-Award	
Letter Of Intent Required	No
Proposed Length Of Award	2 years
Proposal Open Date	10/1/2016
Proposal Close Date	12/31/2016
Proposal Submitted Date	12/13/2016
Projected Receipt Date	2/1/2017
Grant Writer(s)	James Aspen
Department(s) or Program(s)	Environmental, Public Safety
Subject(s)	Active Living, Environmental Safety

Activity Center

Page	Description
Calendar	Every user's homepage; each user can view items assigned to them on the calendar
Message Center	Provides access to messages sent through AF
Events	Important dates in a grant's lifecycle as entered on a grant details page; events do not require any action to be taken; they simply serve as reminders
Tasks	Tasks track the completion of important grant management-related responsibilities that are not achievements or expenses
Achievements	Progress accomplished against a planned performance plan goal
Expenses	Tracks dollars spent against a planned grant budget line item. Expenses are added towards the defined grant budget line items
Tracking Periods	Segmented periods of a grant, typically corresponding to funder reporting requirements

User Specific Section: non-Organization Admin users see only the items they are responsible for in the Activity section.

Reports and Custom Views

Pre-Award Reports	Description
Award Status	Overview of the entire grant portfolio including the grant solicitation success rate
Submission Budget	Provides a grant's pre-award submission budget by fiscal year, including match data
Submission Performance Plan	Provides a grant's submission performance plan
Allocation Reports	Provides Staff members' percent of time and salary amount allocated to grants
Relationship Reports	Displays relationships between organizations, individuals, and staff

Custom Views: Views provide an alternative method to configure data in a meaningful way to the user. Views can be saved for future use or exported for further manipulation.

Reports and Custom Views

Post-Award Reports	Description
Award Status	Overview of the entire grant portfolio including spend down percent and program performance by percent
Grant Budget Variance	Provides a grant's variance between the planned grant budget and submitted expenses for a specified time period
Grant Performance Variance	Provides a grant's variance between the planned performance plan goals and submitted achievements for a specified time period
Overall Grant Reports	Provides a list of all grants with the selected status including grant start date, length in months, spend-down percentage, and performance percentage
GL & Line Item Reports	Provides visibility into expenses against a selected GL account or line item
Goal & Achievement Reports	Provides visibility into achievements against a selected goal

Custom Views: Views provide an alternative method to configure data in a meaningful way to the user. Views can be saved for future use or exported for further manipulation.

AMPLIFUND
www.gotomygrants.com

Key Takeaways

- Collect required Grant information prior to creating a new Grant
- Ensure relevant master data elements exist in AmpliFund
- Grant details populate other areas of the system, like the Calendar, Events, and Tasks

Action Items to Complete. . .

- Create a grant record on your own
- Create and save a view
- Run Pre-Award Award Status Report

How to prepare for the next session. . .

- Performance Planning and Deliverables
 - What is it you said you were going to do?
- Who is involved with your Performance Plans?

Question and Answer



Post Implementation Support

Submit a support ticket:

support@amplifund.zendesk.com

Visit the support portal:

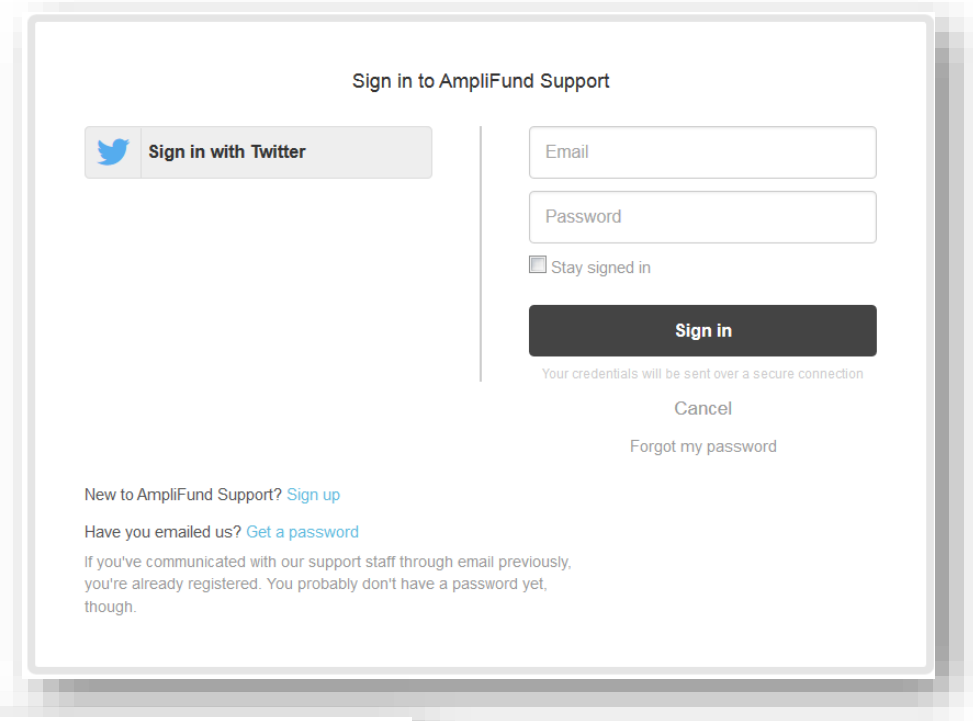
<http://amplifund.zendesk.com>

Supported browsers:

- IE9 +
- Chrome (current version)
- Firefox (current version)
- Safari (5+)

AmpliFund Support Site

1. Go to <https://amplifund.zendesk.com>
2. Click the **Sign up** link
3. Enter your **full name**
4. Enter your **email address**
5. Complete the **I'm not a robot** check
6. Click the **Sign Up** button
7. A welcome email from support@amplifund.zendesk.com will be sent to you via email
8. Click the link to set your password



Sign in to AmpliFund Support

 Sign in with Twitter

Email

Password

☐ Stay signed in

Sign in

Your credentials will be sent over a secure connection

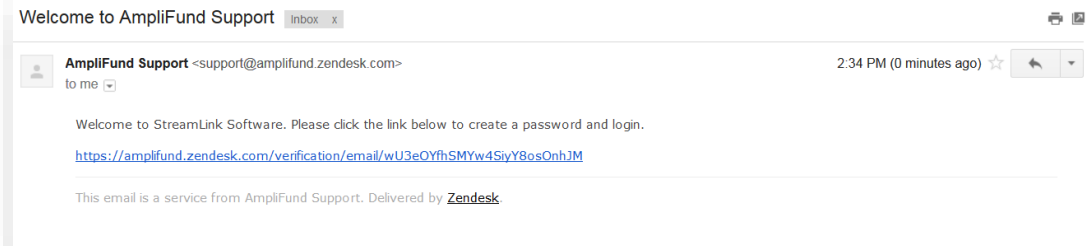
[Cancel](#)

[Forgot my password](#)

New to AmpliFund Support? [Sign up](#)

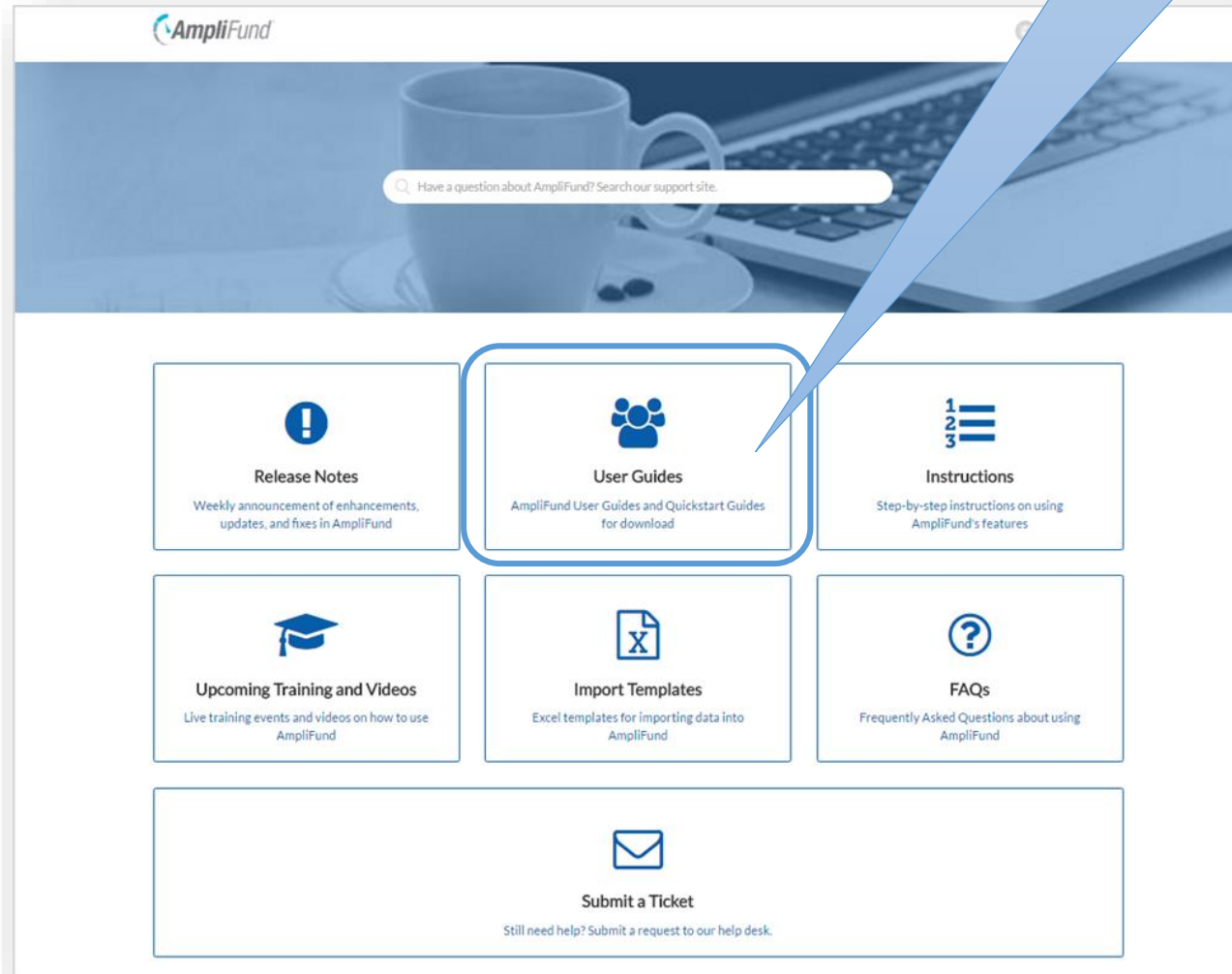
Have you emailed us? [Get a password](#)

If you've communicated with our support staff through email previously, you're already registered. You probably don't have a password yet, though.



AmpliFund Support Site

User Guides available on the AmpliFund Support Site



Reference Materials and URLs

- Contact Management
- Grant Management Guide
- Document Management Guide
- Administration Guide

AmpliFund URLs

www.gotomygrants.com

<http://amplifund.zendesk.com>