Lifecycle Customer's Glossary:

Last Updated 3/21/2023

AmpliFund General Navigation

- **Activity:** This module is used to access tasks and AmpliFund functionality quickly in the system. Here you can find the following:
  - **Calendar:** Where tasks and event due dates are visually represented.
  - **Events:** Where event records are housed in the system.
  - **Message Center:** Where you can read and organize system generated notifications.
  - **Tasks:** Where tasks assigned to the individual are housed, can be updated, created, and completed. For Admin users, all tasks throughout the organization can be viewed here as well.
  - **Workflow Actions:** If a grant is actively enrolled in a workflow and the individual using the system is assigned to a workflow action, they can access it here.
  - **Achievements:** This is used for quick entry of achievements against goals an individual has been assigned.
  - **Expenses:** Access to all the expenses that have been added to the system.
  - **Timesheets:** Where an individual would go to record their time worked on specific grants.
  - **Timesheet Approvals:** Where supervisors can access their employees' timesheets and approve them.
  - **Payment Request Approvals:** If there are payment requests that have been submitted internally by staff or externally by recipients, they can be accessed and approved here.
  - **Tracking Periods:** Here one can set up and view periods of time in which they want to track information.
  - **Reporting Periods:** Here one can view budget and performance time periods that have been created for reporting.
  - **Views:** This section houses all activity custom views created and available to the individual.
- **Contacts:** Houses information regarding all people and organizations that are apart of the grant process.

- o **Organizations:** Organizations are external groups that can be categorized as Federal Government, State Government, Local Government, Foundations, Corporations, Vendors, or Other.
- o **Individuals:** Individuals are individual contacts that are external to your organization.
- o **Staff:** Staff are individuals internal to your organization. Staff records include compensation and benefit history and funding details.
- o **Sub-Recipients:** (For clients with Sub-Recipient Licenses) Sub-recipients are recipients of grant sub-awards.
- o **Lead Recipients:** (For clients with Lead Recipients Licenses) Lead recipients are recipients of awards through the Fund Management or the Competitive Award Management modules.
- o **Federal Government, State Government, Local Government, Foundation, Corporation:** Groups or entities entered in the organizations section under contacts will be sorted into the following categories based on the entity type entry.
  - **Federal Government:** Create and view federal government organizations and contact information.
  - **State Government:** Create and view state government organizations and contact information.
  - **Local Government:** Create and view local government organizations and contact information.
  - **Foundation:** Create and view contact information of entities defined as a foundation.
  - **Corporation:** Create and view contact information of entities defined as Corporations.
- o **Vendors:** Houses contact information for entities external to your organization that you buy and receive a good or service.
- o **Favorites:** Any contacts marked as a favorite will be displayed here.
- o **Views:** This section houses all contacts custom views created and available to the individual.
- **Research:** Houses Amplifund's grant opportunities search engine.
  - o **New Search:** Where a user can use advanced search tools to identify new Grant opportunities.
  - o **My Saved Searches:** Where a user can access search configurations that they had previously saved.

- o **All Saved Searches:** Where a user can access search configurations that anyone within the organization has saved as public.
  - o **My Saved Opportunities:** Opportunities that a user has previously found and saved themselves.
  - o **All Saved Opportunities:** Opportunities that anyone in the organization had found and saved to public opportunities.
  - o **Opportunities for Review:** If another users has sent an opportunity to an individual to review, they can access the opportunity here.
- **Grant Management:** Primarily used to manage grants **received** by the Organization. A user can access grant record and use pre and post award functionality.
  - o **Grants:** Houses all grant records, grant data, and grant documents. This list of grants is often referred to as the *grant portfolio.*
  - o **Grants Awarded:** Houses all the grants that an organization has awarded out to recipients.
  - o **Sub-Awards:** Grants that your organization or funder has passed down to a sub-recipient.
  - o **Favorites:** Access grant records that you have marked as your favorites.
  - o **Views:** This section houses all grant portfolio custom views created and available to an individual.
- **Award Management:** Houses data related to distributing and awarding funds. Used to manage Opportunities and Grants Awarded by the Organization
  - o **Fund Opportunities:** Where all grant programs that are to be awarded by your organization are held. This is where applications and details regarding the opportunity are housed and updated.
  - o **Grant Opportunities:** Used only for grant programs that have funding sourced from the full amount of one of your Grants.
  - o **Form Templates:** Where application forms that have been created or converted as templates are stored. These templates are generally used to copy and paste into new fund opportunity applications.
  - o **Awards:** Grants that your organization has awarded to recipients. Each of these records are broken down by the recipient and their specific award. When one clicks on the $ they will be able to access the details of each specific award.

- **Grant Awards:** A slightly different view of awards. When one clicks on the award name you can access the details of the specific award.
- **Fund Management:**
  - **Funds:** This section holds all the different fund records that have been added to the system. Funds are where money is coming from to support the distribution of awards to recipients.
  - **Awards:** Grants that your organization has awarded to recipients. Each of these records are broken down by the recipient and their specific award. When one clicks on the $ they will be able to access the details of each specific award.
  - **Favorites:** Access fund records that you have marked as your favorites.
  - **Views:** This section houses all fund portfolio custom views created and available to an individual.
- **Project Management:**
  - **Project:** Where grants that have multiple functionalities and budgets are stored and rolled up into one overall project.
  - **Favorites:** Access project records that you have marked as your favorites.
  - **Views:** This section houses all project portfolio custom views created and available to an individual.
- **Reports:**
  - **Reporting Home:** Where all reports in your account can be accessed.
    - **Federal:** System included reports that are specific to the United States Federal Government.
    - **Fund and Opportunity:** System included reports that refer to funding opportunities, scoring, and sub-awards.
    - **Pre-Award:** System included reports in your account that are associated with the grant status': "Internal Review", "To be Submitted", and "Pending".
    - **Post-Award:** System included reports in your account that are associated with the grant status': "Approved", "Denied", "Extended", "Canceled", "Completed, "Closed".
    - **Project:** System included reports in your account that are associated with project budgets.

- **Recipient:** System included reports in your account that are associated with recipient financial and performance monitoring and tracking.
        - **Time and Effort:** System included report for time and effort certification. This will only be useful to clients who have opted to track employee time in the system.
        - **Custom Reports:** Houses all reports created by Amplifund to meet a clients Specific Needs.
- **Documents:** Pre-set folders for document storage. This documentation is account wide and not separated on a grant by grant basis.
    - **Administrator:** Documents that are visible to Users with the Security Role of Organization Admin.
    - **Funds:** Documents that have information regarding funds.
    - **Grants:** Documents that refer to the general grant process of an organization.
    - **Individuals:** Documents that contain information regarding an individual.
    - **Opportunities:** Documents that hold information regarding potential grants.
    - **Organizations:** Documents that contain information about a certain organization.
    - **Projects:** Documents that are in relation to projects in the Amplifund system.
    - **Public:** Documents for everyone in your organization to view and access.
    - **Staff:** Documents that information regarding the organization's staff.
    - **Favorites:** Documents and folders that have been marked as a favorite by an individual.
    - **Views:** This section houses all document portfolio custom views created and available to an individual.
- **Knowledge Center:** Houses Resources for the granting making and seeking community.
    - **Grant Intelligence:** Articles from Thompson Grants, that discuss current topics and issues in the world of grant management.
    - **News:** Additional articles from Thompson Grants that report current events involving grants.

- o **Forms and Tools:** Form template links for common federal reporting that are available for download by Thompson Grants.
- o **Publications:** Guides provide by Thompson Grants that are helpful reference points for the grant management process.
- o **Webinars:** Details regarding upcoming webinars put on by Thompson grants.
- **Administration:** available to only Administrators in the system.
  - o **License Information:** Where information regarding your account is configured and stored. Here you can access overall system settings along with lead and sub-recipient settings.
  - o **System Administration:** Where one can access and configure workflows for their account, along with viewing their accounts activity log.
  - o **System Security:** Houses all user and department records. Allows for explicit and implicit security to be put into place throughout the system.
  - o **Lists:** Contains data configuration and customization for many different fields with drop down options throughout the system.
  - o **Actuals:** Where expense and HR actuals can be imported, stored, and sorted.
  - o **Custom:** Where custom forms, and extensions are held and created in AmpliFund.
  - o **Views:** This section houses all administration related custom views created and available to an individual.