

Budget Management Updates – July 27, 2016

Overview

The table below provides an overview of the Budget Management updates included in the **July 27, 2016** release.

Module	Updated Functionality	Functionality Notes
Administration	<i>Lists → Budget Categories</i>	<p>Federal Categories - pre-populated with the standard federal budget categories</p> <p>Custom Categories - configurable by Organization Administrators</p>
	<i>Lists → Benefit Types</i>	<p>Benefit Types - all available benefit options that may be used when (1) planning staff compensation and (2) when budgeting personnel line items</p> <p>Default Benefit Types - FICA Rate Benefit, Fringe Benefit, Medical Benefit, Other Benefit, and Retirement Benefit</p> <p>Custom Benefit Types - Organization Administrator may now create custom benefits types</p>
Contacts	<i>Staff → Compensation</i>	<p>Compensation tab - provides an area to establish baseline compensation and benefits data for staff</p> <p>Note: The benefit types available in the Benefit Types selector pull from the Benefits Type list (<i>Administration → Lists → Benefit Types</i>)</p>
Grant Management	<i>Pre & Post-Award → Budget Settings</i> <i>Pre & Post-Award → Budget</i>	<p>Budget Settings – enhancements to options for match and indirect cost rate, new features added for budget categories and for budgeting benefits</p> <p>Budget – new budget view options, ability to add caps on budget categories, enhanced and new features on budget line items including spending caps and locking budget line items, spending alert feature on budget categories and line items</p>

Documentation

For complete details regarding the budget management functionality updates, refer to the following guides available on the AmpliFund Support site.

Module	Document Name
Administration	AmpliFund Administration Guide_rev-07-2016-a.pdf
Contacts	AmpliFund Contact Management Guide_rev-07-2016-a.pdf
Grant Management	AmpliFund Grant Management Guide_rev-07-2016-a.pdf

Enhancements & New Functionality Matrix

The July 27, 2016 AmpliFund release includes enhancements to existing functionality as well as new functionality. The table below summarizes enhanced functionality and new functionality by module along with page references to each module's guide for complete details on the topics.

Module & Functionality	Page	Enhanced Functionality	New Functionality
Administration Guide (rev-07-2016-a)			
Lists			
Budget Categories	14	X	
Benefit Types	15		X
Contact Management Guide (rev-07-2016-a)			
Staff			
Compensation <ul style="list-style-type: none"> Benefit History 	7		X
Grant Management Guide (rev-07-2016-a)			
Grants List			
Grants (<i>Caret next to Grants to expand grant menu</i>)	5		X
Performance Planning			
Goals <ul style="list-style-type: none"> Goal Types - Reimbursement Goals (<i>Add as budget item checkbox</i>) 	12	X	
Budget Settings			
Budget Settings Overview	15	X	
Matching	16	X	
Indirect Cost Rate	18	X	
Categories	19		X
Benefits	20		X
Expense Budget Planning			
Budget Views and Options <ul style="list-style-type: none"> Views: Expense, Revenue, Category, Project, Recipient Options: Project, Recipient, By Grant Year, Line Items 	21		X
Budget Categories <ul style="list-style-type: none"> Creating Category-Based Budget Indirect as a Category 	22 22 24		X
Line Items <ul style="list-style-type: none"> Line Item Types Adding Personnel Line Items Adding Non-Personnel Line Items 	24 25 25 26	X	
<ul style="list-style-type: none"> Adding Benefit Line Items Line Item Tabs (<i>General, Financials, Benefits, Configuration, Attachments</i>) Locking vs. Saving Line Items 	26 26 29		X
Expenses <ul style="list-style-type: none"> Spending Alerts 	30		X
Revenue Budget Planning			
Grant Funding	31	X	
Match	31	X	