

Core Series Recipient 2 – AmpliFund Navigation and Performance Reporting **We will start 2 minutes after the hour!**

² Recipient Core Series



- Day 1 Applicant & Recipient Core Series: AmpliFund Applicant Portal: Application Overview and Submission
- Day 2 Applicant & Recipient Core Series: AmpliFund Navigation and Recipient Performance Reporting
- Day 3 Applicant & Recipient Core Series: Recipient Financial Reporting
- Day 4 Applicant & Recipient Core Series: Advanced Recipient Management and Tools
- Day 5 Applicant & Recipient Core Series: State of Illinois Unique Applicant & Recipient Configurations

Agenda

- Master Data
- Grant Details and Settings
- Review Performance Plan
- Enter Achievements
- Close Achievement Reporting Period
- Standard Performance Report
- Activity Center and Tools
- In-Product Demo
- Key Concepts
- Customer Support
- Question and Answer

3



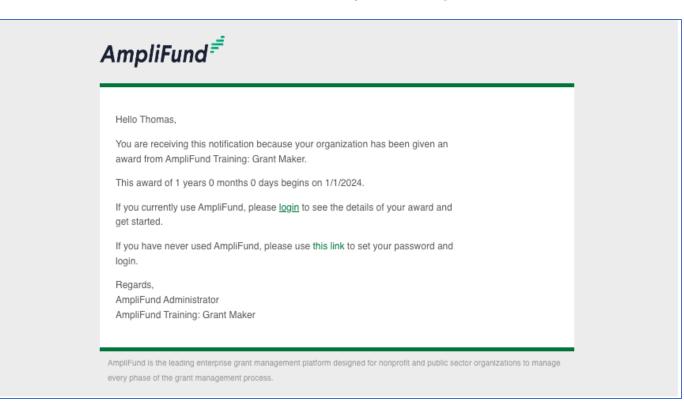


Navigation

Award Activation Email



- AmpliFund sends an automatic email notification when your Grant is Activated
- Click on the login link to log into AmpliFund
- Click on the use "this link" option if you have never used AmpliFund before



Log Into AmpliFund



AmpliFund [≓]		
Login		
Email	thomas_colgrove@outlook.ເ	
Password	Remember my email Forgot your password?	
	Log in with SSO	
	Login	

Navigation Elements



Am	oliFund [≓]							Julie Denver 🔻
								🖶 i 🗄 🌴
	Activity	Past Due Complet	e Due			Grant: All		•
	Contacts	< > today			March 2020	My Events		month week day
•	contacto	Sun	Mon	Tue	Wed	Thu	Fri	Sat
ত্র্	Research	1	2	3	4	5	6	7
\$	Grant Management	8	9	10	11	12	13	14
	Project Management							
	Reports	15	16	17	18	19	20	21
_	Documents	22	23	24	25	26	27	28
	Knowledge Center							
\$		29	30	31	1	2	3	4
	0	5	6	7	8	9	10 Budgeting Tracking Period [11

Left Navigation - shows on every page.

User Navigation – dropdown includes options for account information, change password, message center, support, terms and conditions, applicant portal, and logout.

Options Toolbar – displays icons to perform functions available on the current page, icons vary based on page.

7



Master Data

8

Add User



- Click on Administration > System Security > Users
- Click on the + Icon on the top right of the screen
- Complete the User Information Section
- Complete all required fields marked with an *
- Click Create on the bottom right of the screen
- Click on the envelope icon to invite them into AmpliFund

AmpliFund [≓]					Testing Organization -	Thomas Colgrove 👻	Create User	
						8: +3≥	User Information	
Activity	Drag a column header and d					OTAL 20	Subscribe to Daily Ema Subscribe to Weekly Ema	
_	Display Name		V Invitation Sent	✓ Has Logged In	✓ Status	~	Applicant Portal Acce	
Contacts	Thomas Colgrove	🖋 面 🔤 System Administrators	No	Yes	Enabled		Rol	* Organizational Admin *
Grant Management	Test User AmpliFund	🖋 🛅 🏯 🐸 🛛 Organizational Admin	No	Yes	Enabled		Staff Information	
Reports	Tommy Recipient	🖋 🛅 🙇 🜌 🛛 Organizational Admin / Account Owner	Yes	No	Enabled		First Nam Last Nam	
Documents							Ti	le
Knowledge Center								 Sector system or Monthly
Administration							Primary Address	
License Information System Administration 								Create Cancel
 System Security Users 								
Departments								
 Lists Actuals 								
Favorites								
Views								

Change Account Owner

AmpliFund[≓]

- Click Administration > Liscense Information
- Click on the pencil edit icon on the top right of the screen
- Update the Primary Admin User
- Click update on the bottom right of the screen

AmpliFun	nd [≓]			Simon Wiesenthal Center, Inc. 🔫	Thomas Colgrove 👻
		Details Settings			🖶 i 🖉
Activi		Simon Wiesen	thal Center, Inc.		
Conta	acts	Organization Informat	on		
🕄 Resea	arch	Name	Simon Wiesenthal Center, Inc.		
Grant	t Management	DBA Name			
Docu	ments	Organization Type	Other		
Know	vledge Center	Primary Address	1399 S. Roxbury Drive Los Angeles, CA 90035 United States		
📫 Admi	inistration	Primary Email Address	sburden@wiesenthal.com		
	ense Information tem Administration	Account Owner	Jacqueline Carroll 🚯		
 Syst List: 	tem Security ts	Primary Phone Number	Work: (310) 553-9036		
 Actu Favo 	uals vorites	Vendor ID	9001357677		
Viev		Unique Entity Identifier	NFBTN3MAAR54		



Grant Details and Settings

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Access Grant Details



- Click on Grants Mangement > Grants to access a list of all Grants
- Select the desired Grant and land on the Grant Details page
 - Most of the Post-Award processes start from the Grant Details page

AmpliFun	nd [≓]						Testing Organiz	ation 👻 Thomas Colgrove 👻
		Analytics						8 i 8 + 8
Activit	ity	Drag a column header and drop	it here to group by that column					
		Name 🗸	Grantor 🗸	Award Status 🗸 🗸	Total Awarded Amount 🛛 🗸	Fiscal Year Received 🗸 🗸	Close Out Date 🗸 🗸	Status 🗸
Conta	acts	Core Series Funder - TC	AmpliFund Training: Grant Maker	Approved	\$100,000.00	2024	6/30/2024	Enabled
💲 Grant	t Management							
View	vorites							
Know	ledge Center							
🔹 Admir	nistration							
	3							

Review Grant and Budget Settings



- From the Grant Details page click on Post-Award > Settings and open the Budget and the Grant Settings in a new tab and review
 - Your funder configures the settings

AmpliFund [≓]				
	Details Analytics	Post-Award	• To	ools 🔻
Activity	Core Ser			er - TC – A
Contacts	Award Inforr			JS
Grant Management	-	Cash Flow Manageme		eries Funder - TC
Lill Reports	Re	Settings 🕨		Grant Settings
Documents	Recipient	Award Name	Core S	Budget Settings
Knowledge Center		Award Status	Appro	Reminders
	Grant-Funde	d Amount 🚯	\$100,0	Risk Configuration
Administration	Match Red	quirement 🕕	\$10,00	0.00

Details Analytics Post-Award 🕶 To	əls 💌
Core Series Funde	er - TC – Award Settings
Award Settings	
Budget Reporting Period Monthly	,
Due Date For Budget Items 7 days a	fter every monthly period
Performance Reporting Period Monthl	,
Due Date For Performance Items 7 days a	fter every monthly period
GL Actual Entry Method Manual	or Import
Allowable Amendment Types Awarde	d Amount, Award Duration, Category Budget, Performance Goal
Financial Code	

Details Analytics Post-Award	▼ Tools ▼
Core Series Fu	nder - TC – Budget Settings
Matching	
Match	Enable
Use Match Percentage As	Percentage of Total Grant Budget ()
Post-Award Cash Match Amount	\$10,000.00
Default Cash Match	Percentage
Cash Match Percent	0.00%
Post-Award In-Kind Match Amount	\$0.00
Default In Kind Match Personnel	Percentage
In-Kind Match Percent Personnel	0.00%

Update Grant Details



- Click on the pencil edit icon on the top right of the screen
- Update the Recipient Grant Name Optional
- Update the Recipient Grant Manager Required
 - Pulls from a list of Users in your account
- Update the Recipient Description Optional
- Click Save on the bottom right of the screen

AmpliFun	nd [≓]		Thomas Colgrove 🗸
		Details Analytics Pre-Award	▼ Post-Award ▼ Tools ▼
Activit	ity	Edit Award	
Conta	acts	Award Information and	d Status
🛟 Grant	t Management	Name*	Core Series Recipient Award
LIII Repor	rts	Recipient Name	Applicant Portal Test Account - TC
Docur	ments	Recipient Award Name	Core Series Recipient Award
Know	vledge Center	Fund Activity Categories	
🏩 Admir	inistration	Award Status	Approved
	G	Post-Award Informatio	n
		Responsible Person	Tommy Grantor
		Grant Manager*	
		Recipient Grant Manager*	Select recipient grant manager 👻
		Award Identification Number	
		RFP ID Number	
		Funding Opportunity Number	
		Assistance Listings Number	
			Save Cancel



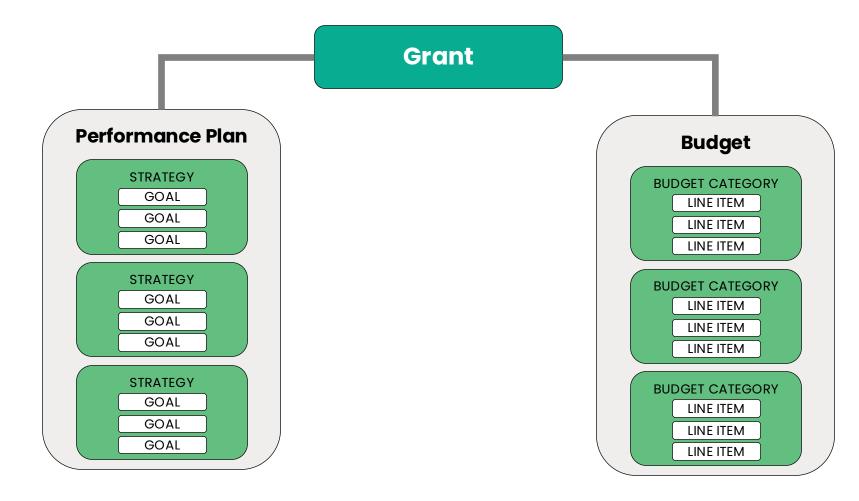
Review Performance Plan

AmpliFund Corporate Presentation

Grant Overview

AmpliFund[≓]

Plan Budget and Performance



Performance Plan: Goal Types



Goal Type	Definition	Example
Milestone	The most basic goal type. They allow for tracking progress as a "Yes" or "No" response by the Responsible Individual.	Create and send Q1 Staff Survey.
Narrative	Question and answer goals. Responsible Individuals may answer the question posed by the goal.	How successful was the grant- related activity this period?
Numeric	A discrete number to achieve. As units of the goal are completed, Responsible Individuals may record units completed.	"Number of program participants" with a goal target of 50.

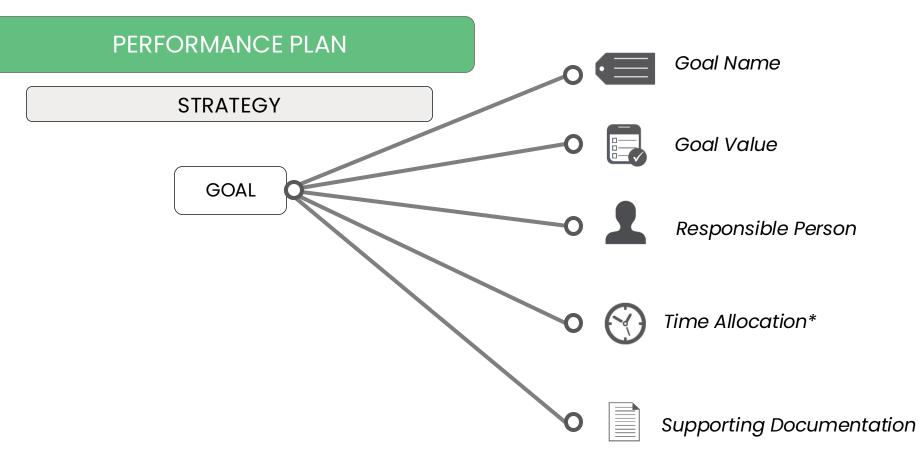
Performance Plan: Goal Types



Goal Type	Definition	Example
Percent Achieved	Goals to reach a desired percent. When tracking progress against a percent achieved goal, Responsible Individuals may capture Total Possible and Total Achieved percentages.	"Volunteer Retention Rate" with a goal target of 70%.
Percent Changed	Goals to track a percent increase or decrease. Percent change goals are defined with a starting percent and a desired percent. When tracking progress against a percent change goal, Responsible Individuals may capture Total Possible and Total Achieved percentages.	"Decrease in Student Absences" with a starting absentee rate of 10% and a goal absentee rate of 3%.
Reimbursement	Goals with a discrete unit to achieve, and a dollar rate associated per unit. When tracking progress against a reimbursement goal, Responsible Individuals may enter Units Achieved.	"Number of Patient Screenings" with target/maximum units of 100, and a reimbursement rate per unit of \$22.



Manage Performance Plans



*Allocations available for Narrative, Numeric, Percent Achieved, Percent Changed, and Reimbursement Goal types



Access Performance Plan and Review Goals



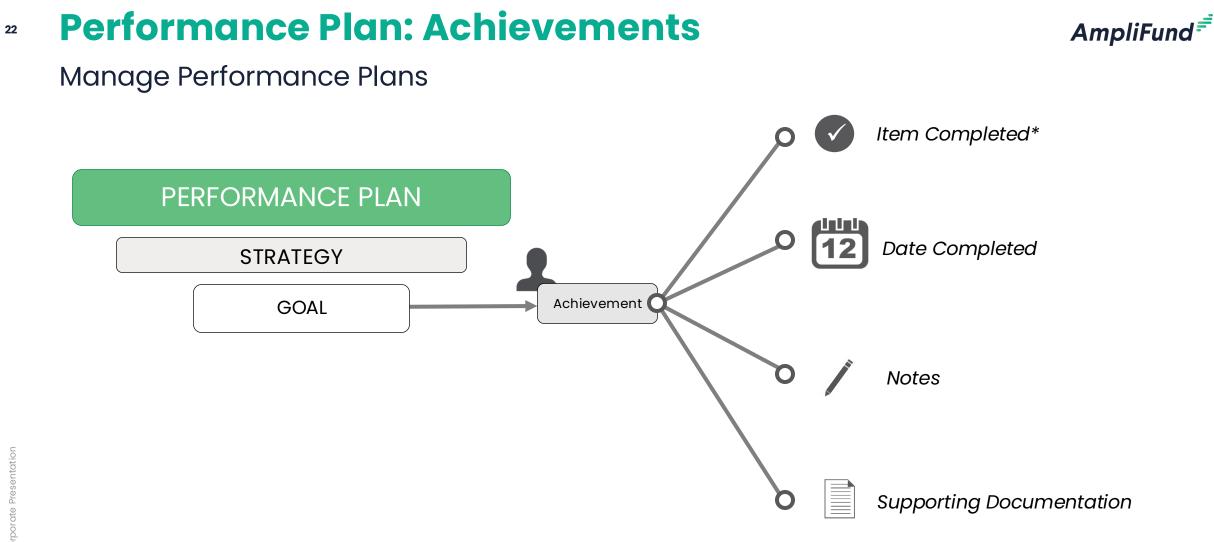
- From the Grant Details page click on Post-Award > Performance > Performance Plan
- Click on the Performance Plan goal to review the details
- Check the Allocations and for Attachments

AmpliFund [≓]			
	Details Analytics	Post-Award 👻	Tools 💌
Activity	Core Ser	Financial 🕨	er - TC – Performa
Contacts	Drag a column header a	Performance 🕨	Performance Plan
Grant Management	Name	Cash Flow 🕨	Performance Strategies
	Test Percent Achieved	Management 🕨	Percent Achieved
III Reports	Test Milestone	Settings 🕨	
Documents	Test Numeric		🝸 Numeric
Knowledge Center	Test Narrative		🝷 Narrative
Administration			
G			

20



Enter Achievements



*Item completed formatting is determined by goal type: i.e. a number completed, an answer to a question, etc.

²³ Enter Achievements



- Click on the Trophy icon next to the Performance Plan Goal
- Click on the + Icon next on the top right of the screen
- Click on the Performance Plan on the top left of the screen to get back to the Performance Plan list

AmpliFund [≓]				Th	omas Colgrove 👻	
	Details Analytics Pre-Award 🕶 Post-Award	▼ Tools ▼			⊕i+∎⊫⊳	
Activity	Test-Award – Perforn	nance Plan		Create Achievement		
Contacts	Drag a column header and drop it here to group by that o					
😽 Grant Management	Name	Goal Type	Responsible Individual V Strategy	Grant Test-Award Goal Type Milestone		
Reports	Test 🖉 🗇 🖤	Milestone	Thomas Colgrove	Goal Test Description		
Documents				Responsible Individual Thomas Colgro	live	
Knowledge Center				Achievement Date	ii ii]
Administration						
				Notes		
				Upload File(s)	se file(s)	
						Create Cancel



Close Achievement Reporting Period

Access Reporting Periods



- From the Grant Details page click on Post-Award > Management > Reporting Periods
- Click on the + Icon on the top right of the screen
- Select Achievements
- Select the Reporting Period
- Click Save on the bottom right of the screen

AmpliFund [≓]	Reporting Periods							
	Details Analytics Post-Award 🕶 Tools	🖶 i +						
Activity	Activity Core Series Funder - TC – Reporting Periods							
Contacts	Drag a column header and drop it here to group by t	that column				What types of reporting periods would you like to include?		
Grant Management	Reporting Period Start Date	✓ Reporting Period End Date	✓ Reporting Period Type	✓ Status	~	Expenses Achievements		
	10/1/2023	10/31/2023	Budget	Open		What period of time would you like to close?		
Reports	7/1/2023	7/31/2023	Budget	Closed		✓ Select a time period		
Documents	8/1/2023	8/31/2023	Budget	Closed		10/1/2023-10/31/2023 11/1/2023-11/30/2023		
Knowledge Center	9/1/2023	9/30/2023	Performance	Closed		12/1/2023-12/31/2023 Cancel Save		
Administration	8/1/2023	8/31/2023	Performance	Rejected		2/1/2024-2/29/2024 3/1/2024-3/31/2024		
	7/1/2023	7/31/2023	Performance	Rejected		4/1/2024-4/30/2024 5/1/2024-5/31/2024		
0						6/1/2024-6/30/2024		

Close Reporting Periods



Cancel

- Attach documents as needed
- Check that Achievements are pulling into the Reporting Period
- Click the Close button on the bottom right of the screen to submit to your funder
- Clicking Save will create the Reporting Period but does not submit it to your funder

Core Series Fur	nder - TC – Reporting Periods	5		t				
茴 Start: 7/1/2023 茴 End: 7/31/20	23							
Status: Rejected								
Achievements			Achievements	Analytics				
Overall Achievements D	etails		Goal		Туре		# of Achievements Period to Date	
Number of Goals with No Achievements	1		Test Percent Achieved		Percenta	age Achieved	0	
Achievements			Test Milestone		Mileston	e	1	
Commente			Test Numeric		Numeric	Goal	1	
Comments			Test Narrative		Narrative	e	1	
	Attach Documentation	¢	Achievements (Select All	Closeout				
Attach Documentation			Select	Goal		Goal Type	Description	Last Achievement
	Choose a file			Test Milestone		Milestone		7/31/2023
				Test Numeric		Numeric Goal		7/31/2023
				Test Narrative		Narrative		7/31/2023

Navigate back to the Reporting Period List Page



• After Closing click on the Reporting Periods tab on the top left of the Reporting Period page to access the list of all Reporting Periods for this Grant

AmpliFund [≓]		Testing Organization -	Thomas Colgrove 🔫
	Reporting Periods		e i
Activity	Core Series Funder - TC – Reporting Periods		
Contacts			
; Grant Management	iiii Start: 9/1/2023 iiii End: 9/30/2023		
Lill Reports	Status: Closed		
Documents	Achievements O		
Knowledge Center	Overall Achievements Details		
Administration	Number of Goals with No Achievements		
3			
	Comments		
	Attach Documentation Existing Attachments		
	Logo-FullColor-hi-res.jpeg		



Standard Performance Reports



²⁹ Performance Plan Detail and Performance Plan Summary Report



- Click on Reports > Post-Award
 - Performance Plan Detail
 - Performance Plan Summary
- Configure the Filters from the column on the right side of the page
 - Filter by All, Grant, Responsible Individual, Achievement Date, and Goal Type

 Clic 	k the Export PDF tab to export as	AmpliFund [≓]		Testing Organization - Thomas Colgrove -
	PDF, Excel, RTF, CSV	Activity	Grant Performance Plan	Find 🔨 🗸
		Contacts		▼ Filters +
npliFund [≓]	· · · · · · · · · · · · · · · · · · ·	Testing Organization - Thomas Colgrove -		Grant Name
			Performance Plan Summary	Core Series Funder - TC
Activity	Grant Performance Plan		Grant Name Core Series Funder - TC	Responsible Individual 🗙
	C Export PDF V	Find ×	Award Amount \$100,000.00	Test User AmpliFund
Contacts		▼ Filters +	Milestone	Achievement Date 🗙
Grant Management		Grant Name 🗙	Goal Responsible Individual Date Date Date Complete Test Milestone Test User AmplFund 08/31/2023 No 06/30/2024 08/31/2023	07/31/2023 09/28/2023
Reports	Grant Performance Plan Detail	Core Series Funder - TC		12:00 AM 12:00 AM Goal Type X
 Federal Post-Award 	Grant Name Core Series Funder - TC Grant Amount \$100,000.00	Goal Type ×	Narrative <u>Goal Responsible Individual Achievement</u> <u>Completed</u> <u>Question</u> <u>Answers</u>	
Post-Award Grant Budget Variance	Milestone	Achievement Date X	Test Narrative Test User AmpliFund 08/31/2023 No Test Question 2	 Columns
Grant Expense Detail	Goal Individual Achievement Date Allas Completed Due Date Date Complete Test Milestone Test User AmpliFund 07/31/2023 No No 06/30/2024 07/31/2023			
Grant Performance Plan E Grant Performance Plan S	Achievement Notes Add Irol here 9 Test Wiestone Test User AmpliFund 08/31/2023 No No 06/30/2024 08/31/2023	07/31/2023 09/28/2023 12:00 AM 12:00 AM	Numeric Goal Responsible Individual Achievement Completed Number to be Number Achieved Variance	Column A
Payment Request Detail R Post-Award Status		Responsible Individual × Test User AmpliFund	Goal Hesponsible individual Date Completed Achieved Number Achieved Variance Test Numeric Test User AmpliFund 09/28/2023 No 24 6 -18.00	Column C
 Pre-Award 	Narrative Goal Responsible Achievement Date Has Individual Achievement Date Attachment Completed Question Answer			Column D Column E
	Test Narrative Test User AmpliFund 07/31/2023 No No Test Question Things went good	▼ Columns	Percent Achieved	Column F
	Test Narrative Test User AmpliFund 08/31/2023 No No Test Question Put the answer here	Goal Name and Type Responsible Individual	Goal Responsible Individual <u>Date Completed Percent Desired Percent Achieved Variance</u> Test Percent Achieved Test User AmoliFund 08/31/2023 No 98% 95.00% -3%	Column G
	Numeric	Achievement Date		
	Goal Responsible Achievement.Date Has Individual Achievement.Date Has Attachment Completed Number to be Achieved Number Achieved Variance	Has Attachment		
	Test Numeric Test User AmpliFund 07/31/2023 No No 24 2 -91.67% Advenuence Notes Add staff here. Test Numeric Test User Amplifund 08/31/2023 No No 24 2 -91.67%	Goal to Achieve		
	Test Numeric Test User AmpliFund 08/31/2023 No No 24 2 -91.67% Test Numeric Test Vuer AmpliFund 09/28/2023 No No 24 2 -91.67%	Achievement Achievement Variance		
	Achievement			
	Percent Achieved 6.00 -75.0%			
-	Goal Responsible Achievement Date Has Achievement Date Has Attachment Completed Percent Desired Percent Achieved Variance			
	Test Percent Achieved Test User AmpliFund 08/31/2023 No No 98.00% 95.0% -3.0%			
	Achievement oc.nns. 3.ns.			



Activity Center and Tools

Activity Center – Achievements



- Click on Activity > Achievements for a shortcut to entering Achievements
- All Performance Plan Goals for all Grants are listed here
- Drag the Grant Name Colum into the row of the page
- Click on the bookmark icon on the top right of the screen to save this view
- Click Activity > Views to access the view later
- Click on the + icon next to the desired Performance Plan Goal to add an Achievement

Ampl	liFund [≓]											Testing Or	ganization -	Thomas Colgrove
														⊖i ⊧
	Activity	÷ (GrantName 🗙											
_	Calendar		Activity Name	~	Grant Name	~	Goal Type	~	Responsible Individual	\sim	Start Date	\sim	End Date	~
3	Events Message Center	4	Grant Name: Co	re Serie	s Funder - TC									
\$	Tasks		Test Percent Achieved	₽+	Core Series Funder - TC		Percent Achieved		Test User AmpliFund	7.	/1/2023		6/30/2024	
<u>hl</u>	Achievements Expenses		Test Milestone	₽+	Core Series Funder - TC		Milestone		Test User AmpliFund	7.	/1/2023		6/30/2024	
	Reporting Periods Views		Test Numeric	₽+	Core Series Funder - TC		Numeric		Test User AmpliFund	7.	/1/2023		6/30/2024	
H	Knowledge Center		Test Narrative	₽+	Core Series Funder - TC		Narrative		Test User AmpliFund	7.	/1/2023		6/30/2024	
	-													
; /	Administration													
	8													

- There are auto-generated standard tasks for Budget and Performance reporting requirements that you must mark as complete
 - Click on the checkmark icon next to the Task to mark as complete
- You can create Tasks and automatic reminders for yourself or other Users in your account
 - Click on the + icon on the top right of the screen
 - Enter all required information
 - Configure reminders
 - Click Save on the bottom right of the screen

pliFund [≓]							Testing Organization 👻 Thoma:	s Colgrove 🗸	Responsible Individual*	Test User AmpliFund O ₄
	Details Analytic	cs Post-Award 🔻	Tools 💌					⊖i+-5)	Additional Individuals	Select Additional Individuals
Activity Contacts Grant Management	Core Se Actions ∦ā√	eries Fun	Tasks Documents	– T	asks				Reminder 2	MM/DD/YYY 10 day(s) before due 5 day(s) before due
	Select All	Name	Notes		✓ Responsible Individual	∽ Due Date	✓ Task Status	~		
Reports		Test Task		ø 💼 •	 Tommy Recipient 	9/30/2023	Completed			
Documents		Budgeting Tracking F Funder - TC	Period Due - Core S	eries	Test User AmpliFund	8/7/2023	Completed			
Knowledge Center		Budgeting Tracking F Funder - TC	Period Due - Core S	eries	 Test User AmpliFund 	9/7/2023	Not Started			
Administration		Budgeting Tracking F Funder - TC	Period Due - Core S	eries	Test User AmpliFund	10/7/2023	Not Started			



Save

Core Series Funder - TC – Task

Admin and Support



In-Product Demo





Key Concepts

35 Key Concepts



- Basic AmpliFund Navigation
- Review Grant Settings
- Update Grant Details
- Performance Reporting
 - Performance Plan
 - Achievements
 - Reporting Periods
 - Standard Reports
 - Activity Center and Tools

Next Session: Financial Reporting



Customer Support

³⁷ Create AmpliFund Support Account



- 1. Go to the appropriate support site
 - o https://amplifund.zendesk.com
 - o <u>https://il-amplifund.zendesk.com</u>
 - o https://ne-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. An email from support@zendesk.com will be sent to you via email
- 8. Click the link to set your password

Sign in to Illinois Grant Management Support	×
Email	
Sign in	
Forgot my password	
New to Illinois Grant Management 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.	

38 AmpliFund Illinois Support Portal



Submit a support ticket:

- Commercial <u>Support@amplifund.zendesk.com</u>
- Illinois <u>Support@il-amplifund.zendesk.com</u>
- Nebraska <u>Support@ne-amplifund.zendesk.com</u>

Supported Browsers:

- Google Chrome (current supported releases)
- Mozilla Firefox (current supported releases)
- Microsoft Edge (current supported releases)
- Apple Safari 10+

AmpliFund"		Submit a request 🛛 🛞 Ben Klein 🗸
Q Have a que	stion about AmpliFund? Search our support site.	
CALLER AND		
		and a state of the state
-	100	
V	600	
State Agencies	Start Here	Grantees
Information and guidelines specific to the State Agency community	Learn more about the State of Illinois partnership with AmpliFund	Information and guidelines specific to the Grantee community
0	:0:	12
Release Notes	User Guides	Instructions
Announcements of enhancements, updates,	AmpliFund User Guides and Quickstart	Step-by-step instructions on using
and fixes in AmpliFund	Guides for download	AmpliFund's features
	R	?
Upcoming Training and Videos	Import Templates	FAQs
Live training events and videos on how to use	Excel templates for importing data into	Frequently Asked Questions about using
AmpliFund	AmpliFund	AmpliFund
	M	
	Submit a Ticket	
	Submit a Licket	



Question and Answer

