# **Awarding Business Process Documentation: [Customer Name]**

*Last Updated [Date]*

**Section 1: Fund Creation**

A fund is the income source for an award, allowing reporting and tracking of awards obligated and liquidated.

****

**Business Process Owner:** [Name]

***Important Note****: Income Received must be greater than or equal amount awarding*

* Internal naming convention: [add here]
* Custom Fields required to be completed: [if applicable add here]

**Section 2: Opportunity Funding Set-up (if awarding via opportunity)**

An opportunity allows organizations to receive applications and is linked to both he fund and resulting awards.

****
**Business Process Owner:** [Name]

* Funding Linked to Opportunity
* Award Management>Fund Opportunities
* Opportunity details page>Funding Information Section

***Important Note****: Fund must be linked to opportunity prior to creating awards*

**Section 3: Workflow Set-up**

A workflow is required to create awards from an application.

**[Add details here about your application review workflow configuration and the awarding step]**

**Business Process Owner:** [Name]

**Section 4: Award Set-Up & Configuration**

An award creates the basis for recipient reporting and interaction with the funder in AmpliFund.

**Business Process Owner:** [Name]

**Step 1**: Award Creation:

* Awards are Created by: **Workflow** **Action** by [Name]
* Award creation triggers a notification to the applicant that their application has been approved.



Award Funding:

* Awards are Funded by: **Fund**
* Funding Source is: [**Multiple Funds or One Fund]**

**Step 2:** Configure Award Details Page (Award Management>Awards):

* Configured by: [Name]
* Fields in use and internal name
	+ [Example] Award Identification Number=
	+ [Example] Payment Account Number=
* Custom Fields to complete: [Add here if applicable]

**Step 3 (if applicable)**: Running Grant Agreement/Contract (Reports>Custom Reports>REPORT NAME)

 

* Fields that must be completed for full agreement/contract to populate: [add here if applicable]

**Step 4:** Award Settings (Award>Post Award>Settings>Grant Settings):

Award settings allow the ability for use of reporting periods and trigger tasks for recipients to receive reminders of reporting requirements.

* Configured by: [Name]
* Budget Reporting Period Cadence: [**Monthly, Quarterly, Bi-Annually, Annually]**
* Budget Reporting Period Due Date: **# Days**
* Performance Reporting Period Cadence: **Monthly, Quarterly, Bi-Annually, Annually]**
* Performance Reporting Period Due Date: **# Days**



Example:



**Step 5**: Budget Permissions (Award>Post Award>Settings>Budget Settings):

Budget permissions identify who has access to edit the budget and enter expenses.

* Configured by: [Name]
* Budget Creation Permissions: [**Recipient can View, Funder can Edit OR Recipient and Funder can edit OR Recipient can Edit Funder can View]**
* Expense Creation Permissions: [**Recipient can View, Funder can Edit OR Recipient and Funder can edit OR Recipient can Edit Funder can View]**



**Step 6**: Performance Plan Permissions (Award>Post Award>Settings>Performance Plan Settings):

Performance plan permissions identify who has access to edit the plan and enter achievements.

* Configured by: [Name]
* Performance Plan Creation Permissions: [**Recipient can View, Funder can Edit OR Recipient and Funder can edit OR Recipient can Edit Funder can View]**
* Achievement Creation Permissions: [**Recipient can View, Funder can Edit OR Recipient and Funder can edit OR Recipient can Edit Funder can View]**



**Step 7**: Budget Configuration (Award>Pre-Award>Submission Budget)

* Budget is created by: **Copying from Pre-Award by:** [Name]
* **Note**: Once copied a budget can be edited via Post-Award>Financial>Budget





**Step 8**: Performance Plan (Award>Pre-Award>Submission Performance Plan)

* Performance Plan is created by: **Copying from Pre-Award by** [Name]
* **Note**: Once copied a performance plan can be edited via Post-Award>Performance>Performance Plan

**Step 9**: Activate Award

* Completed by: [Name]
* Sends an email to the recipient to log-in to AmpliFund and begin managing their award