Grant Explorer User Guide

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Grant Explorer Overview

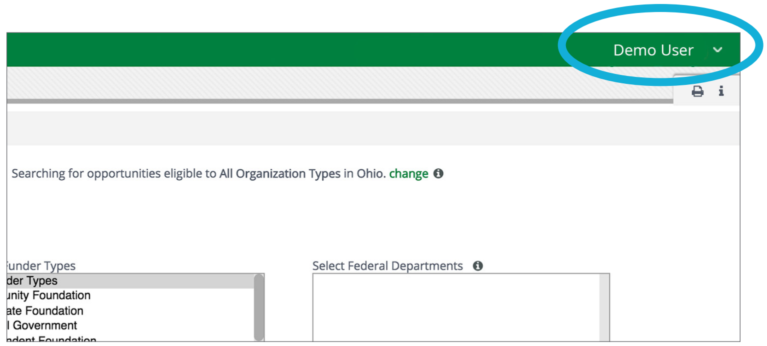
This guide is for organizations who have received an invitation from their government agency to log in to AmpliFund. As a Grant Explorer user, you will be able to invite and manage your organization's users, search for and save grant opportunities, set up email notifications for new opportunities, and access valuable grant management information andresources.

For more help with using AmpliFund, visit www.fundsmgmt.com.

Getting Started in AmpliFund

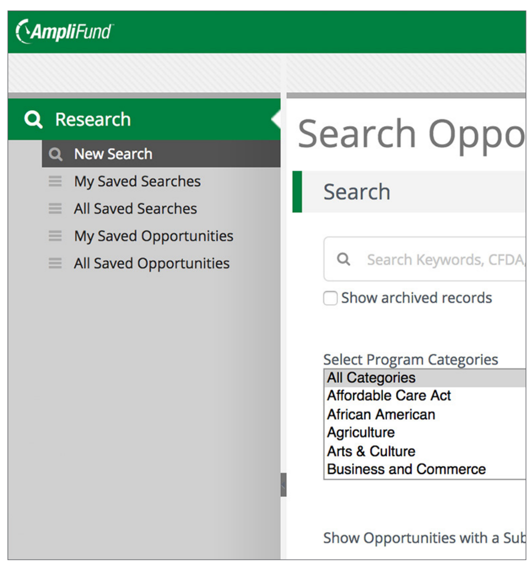
AmpliFund uses menus, tabs, and icons for navigation and actions.

User Navigation Menu



Click your name in the top-right corner of AmpliFund to access account information, change password, support, terms and conditions, and logout.

Left Navigation Panel

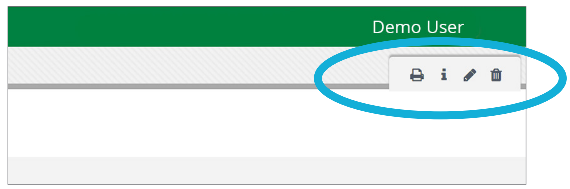


The left navigation panel is the main navigation for AmpliFund. Click any of the top-level menu items to expand, and click any sub-level item to open a page. Most menu pages (i.e. *Research>All Saved Searches*) will take you to a list view. To view a list item's details, click the item's name.

Context-Specific Tabs

Once you navigate to an item's details, you will see context-specific tabs above item. This menu will show additional information related to that item.

Icons



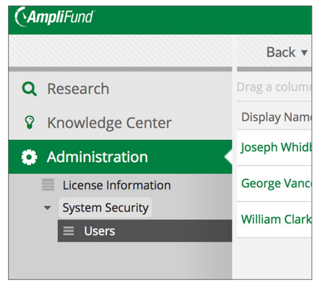
Icons allow you to perform actions on an item, such as edit, add, or delete. Icons may appear next to an item in a list view, or in the *Icon Bar* just below the User Navigation Menu. Hover over any icon to see its action.

How To Add a New User

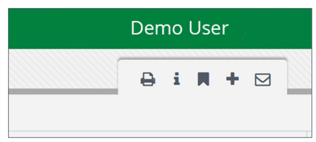
For Organizational Admin Users Only

Users must be sent an invitation before they can access AmpliFund.

1. Open **Administration>System Security>Users**.



2. Click the **+ (Create Icon)** in the *Icon Bar*.

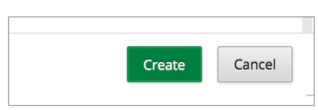


User Information

3. Select the user's security **Role**.
   - **Organizational Admin** have the highest level of security and can create, view, and edit all records in the account. Organizational Administrators are the only users that can create, view, and edit records in the Administration module. There is no limit to the number of Organizational Administrators you can have per account.
   - **Researchers** only have access to the Research and Knowledge Center modules.

Staff Information

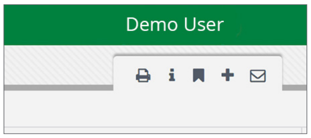
4. Add the user's **First Name** and **Last Name**.
5. Add the user's job **Title** (optional).
6. Add the user's **primary address** (optional).
7. Add the user's **Email Address**.
8. Click **Create**.



Note

The user's email address will also be used as their account login, so it must be unique and cannot be changed. However, additional contact email addresses may be added and edited.

9. To send the user an invitation to AmpliFund, click the **(Invite to AmpliFund icon)** in the *Icon Bar*. The user will receive an email with a link prompting them to create a password.



10. In the confirmation pop-up window, click **Send Invitation**.

Research Overview

The AmpliFund *Research* module provides ways to seek out funding opportunities from Grants.gov, ancillary Federal Agencies, all State Agencies, large cities and counties, and foundations. From the *Research* module, users can save search criteria, set up alerts, and save and import grants directly from search results.

Icons

Print

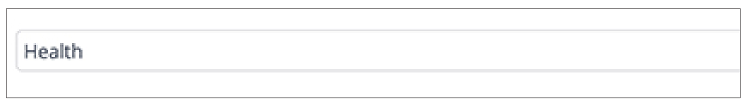
Help

Search

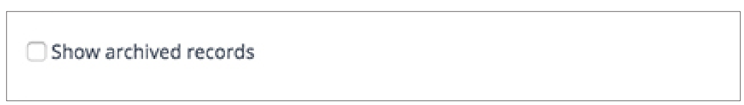
The *Grant Research* module allows you to filter search results for grants by deadline, category, state, eligibility, and funder types, as well as by search terms, partial words, and phrases. The full-text index search supports search terms; partial words (i.e. “Edu”); phrases; as well as "and", "or", and "not" logic (i.e. “Northwest NOT Oregon”). Words separated by a space will return results matching with any of those words. Quotes around search terms will return exact matches.

How To Search for Grants

1. Open **Research>New Search**.
2. In the search field, add **Search** terms (optional). These terms will be searched against opportunity Keywords, CFDA, Agency, and Description fields.



3. Check the **Show archived records checkbox** as desired. This will include any closed or archived opportunities in your search results.



4. By default, your search will include opportunities available to All Organization Types in All Locations. To filter, click **Change**.
    a. In the pop-up window, select eligible **Organization Types** and **Locations**. Hold **Control/Command** and **click** to select multiple entries.
    b. Click **Save**.
5. Select **Program Categories** (optional). Hold **Control/Command** and **click** to select multiple categories.
6. Select **Funder Types** (optional). Hold **Control/Command** and **click** to select multiple types.
    a. If your search includes *Federal Government* as a Funder Type, select **Federal Departments** (optional). Hold **Control/Command** and **click** to select multiple departments.
7. Select a Submission Close Date window with the **After** and/or **Before**

fields (optional).

8. Click **Search**.

Note

Any changes made to public saved searches will be made for all users in the account.

How To Save a Search

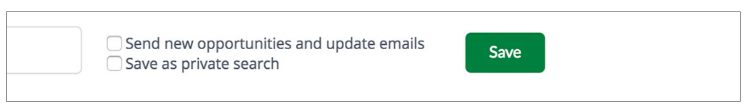
Search criteria can be saved as a private (available only to the user who created it) or public (available to all users in the account). You can also request email notifications for new opportunities that match your search criteria.

1. Open **Research>New Search**.
2. Add your **search criteria**.
3. Click **Search**.

Saved Search

4. Add the **Search Name**.

5. Check the **Send new opportunities and update emails checkbox** to receive email notifications.
6. Check the **Save as private search** to save search to your account (*Research>My Saved Searches*), or leave unchecked to save the search to your organization's account (*Research>All Saved Searches*).



7. Click **Save**.

How To View a Saved Search

1. Open **Research>My Saved Searches** or **>All Saved Searches**.
2. Click a **search name**.

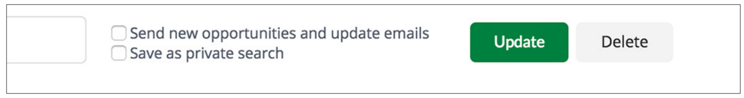
How To Edit a Saved Search

1. Open **Research>My Saved Searches** or **>All Saved Searches**.
2. Click a **search name**.

3. Update the information as necessary.

Saved Search

4. Click **Update**.



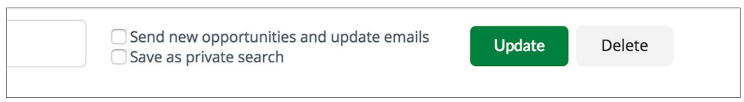
How To Delete a Saved Search

Note
Deleting a public saved search will delete it for all users in the account.

1. Open **Research>My Saved Searches** or **>All Saved Searches**.
2. Click a **search name**.

Saved Search

3. Click **Delete**.



4. In the confirmation pop-up window, click **Delete**.

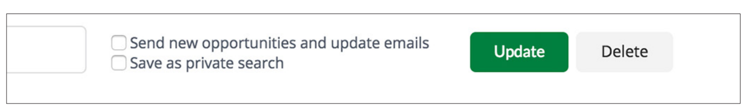
How To Set Up Search Email Notifications

Email notifications can be set up from saved search criteria. The email will include all new opportunities and updates that match your search criteria on a daily basis. The notifications will also appear in *Activity>Message Center*. You will stop receiving email notifications if the saved search is deleted. You can also stop email notifications at any time.

1. Open **Research>My Saved Searches** or **>All Saved Searches**.
2. Click a **search name**.

Saved Search

3. Check the **Send new opportunities and update emails checkbox**.



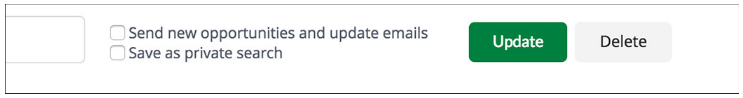
4. Click **Update**.

How To Stop Email Notifications

1. Open **Research>My Saved Searches** or **>All Saved Searches**.
2. Click a **search name**.

Saved Search

3. Uncheck the **Send new opportunities and update emails checkbox**.



4. Click **Update**.

Icons

- Print
- Help
- Favorite
- Imported to Grants

Search Results

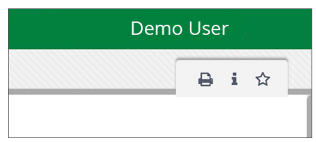
Search results appear below the *Results* section of the page. From your search results, you can save opportunities and send them for review.

How To Save an Opportunity

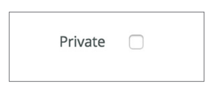
After searching, you can save an opportunity from the *Results* section. You can save an opportunity privately or publicly. Once saved privately or publicly, the opportunity will appear in *Research>My Saved Opportunities* or *Research>All Saved Opportunities*, respectively. .

Results

1. Click an **opportunity name**.
2. Click the ☆ **(Favorite icon)** in the *Icon Bar*.



3. In the pop-up window, add the opportunity **Name**.
4. Add a **Description** (optional).
5. Check the **Private checkbox** to save privately, or leave unchecked to save publicly.



6. Click **Add**.

How To View a Saved Opportunity

1. Open **Research>My Saved Opportunities** or **>All Saved Opportunities**.
2. Click an **opportunity name**.

Note

Removing a public saved opportunity will remove it for all users in the account.

How To Remove a Saved Opportunity

1. Open **Research>My Saved Opportunities** or **>All Saved Opportunities**.
2. Click an **opportunity name**.
3. Click the ★ **(Favorite icon)** in the *Icon Bar*.

Knowledge Center Overview

The AmpliFund Knowledge Center module provides users with access to valuable grant management information and resources. Users are able to find grant news, expert opinions, interactive guides, full publications, and webinars that can all be used to increase your team's knowledge of grant management topics.

Icons

Print
Help

Knowledge Center Features

The Knowledge Center includes Grant Intelligence, News, Forms and Tools, Publications, and Webinars. The Knowledge Center is powered by Thompson Information Services.

Grant Intelligence

Grant Intelligence provides access to a variety of grant-related articles that are updated regularly.

News

News provides access to up-to-date and important grant-related news.

Forms and Tools

Forms and Tools provide a variety of Standard Forms (SF) related to Federal grants as well as other templates, worksheets, and checklists. Examples include SF-424 forms, SF-425 Federal Financial Report forms, SF Performance Progress Report forms, grant management calendar templates, risk assessment templates, time and effort worksheet templates, and audit checklists and worksheets.

Publications

Publications provides several full publications from Thompson Information Services in PDF format. These publications are both printable and downloadable.

References in Grant Development and Management

A guide for grant seekers, grant managers, or others involved in obtaining, managing, or closing out federal, state, foundation, and corporate grants. This resource gives readers a comprehensive listing of common grant-related terms along with examples, so it can serve as a readily available resource for a new staff person or as a quick reference to explain a concept or issue.

Federal Grants Management Handbook (Volume 1 & 2)

With the Office of Management and Budget's ushering in the most expansive grant reform since the Single Audit Act of 1984, grant recipients must plan for a whole new set of rules. OMB's new grants guidance alters the procedures and expectations for anyone who works with or monitors grants, but, more importantly, it shifts the focus from compliance to a new emphasis on performance. How will you stay on top of those changes so you not only adapt, but thrive?

Thompson's Grants Compliance Expert | Federal Grants Management Handbook, the leading guide for the federal grants community since 1978, can help guide you through the process. The most comprehensive and trusted source for anyone administering federal program funds, the Handbook can show you how the new guidance impacts:

- financial management systems,
- procurement and property standards,
- audit resolutions,
- time and effort documentation,
- allowability, and
- now, performance requirements for both program and finance.

Single Audit Information Service (Volume 1 & 2)

Thompson's Grants Compliance Expert | Single Audit Information Service breaks down the most complex and potentially confusing single audit requirements so you can take the steps needed to stay in compliance with the complicated, detailed rules governing this federal requirement for grant recipients that expend more than $750,000 in agency funding — a threshold that has just been raised from $500,000 under new uniform grant reform guidance. But what if your organization doesn't make the audit threshold? Should you still do audits, and what would you include? Find out about the audit process, different types of audits, the most recurring audit findings that persistently cause trouble and how to avoid them.

Keep up with the changes that impact audits under OMB's new uniform grant guidance: *Thompson's Grants Compliance Expert | Single Audit Information Service* — the most extensive and easy-to-use resource of its kind — keeps you abreast of the grant reform's impact on single audit requirements by tracking every step of the process from the guidance's roll out to agency implementation.

With *Thompson's Grants Compliance Expert | Single Audit Information Service* you can:

- Improve processes from soliciting bids for audit services to preparing audit reports to resolving audit findings with federal officials
- Stay in compliance with every aspect of single audit law — your best

defense against the loss of funds and other enforcement actions.

- Understand your responsibilities by translating government jargon into easy to understand text and clarifying all of the single audit law and policies
- Keep informed with monthly updates as needed on the latest government documents and revisions
- Successfully handle an audit, increase its benefits and limit its potentially adverse impact

Webinars

Users can register for Thompson Information Services webinars on a variety of topics. Thompson charges a fee for attending the webinars and details about the fees and registration process are accessible by clicking on the webinar link in AmpliFund. Clicking a webinar link in AmpliFund will open a separate window linked to the Thompson Information Services website. The webinar page on Thompson's website provides webinar details such as: date and time, CPE credit information (if applicable), course description, and cost.

Thompson's Grants webinars break down the most complex and potentially confusing guidance and regulations issued by OMB and federal agencies, so you can take the steps needed to stay in compliance — and now demonstrate performance — under the new rules governing funding. The webinars provide easy-to-understand explanations of requirements and strategies can help you better find grant opportunities, develop proposals, understand award notices, document grant expenditures, deliver effective reports and prepare for audits.

Thompson's Grants webinars can show you how the uniform grant guidance impacts grants development, time and effort documentation, financial management systems, allowability of costs, procurement and property standards, risk assessments, indirect cost determinations, performance requirements for both program and finance, and audit resolutions.

Administration Overview

The *Administration* module is only available to Organizational Admin users and shows information and settings for the organization's AmpliFund account. Within this module, Organization Admin may set account settings, user security roles, and send user invitations.

Icons

- Print
- Help
- Edit

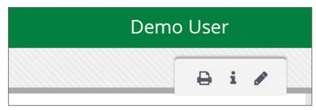
License Information

License Information contains details about your AmpliFund account, such as your organization's name and contact information.

How To Add/Edit Account Details

From the *Details tab*, Organizational Admin can edit the organization information, primary contact information, description, and record information.

1. Open **Administration>License Information**.
2. Click the **(Edit icon)** in the *Icon Bar*.



Organization Information

3. Add the account **Name**.
4. Add the **DBA Name** (optional). This is an alternative name your organization does business under.
5. Select the **Organization Type**.
6. Add the **Primary Address**, **Primary Email Address**, and **Primary Phone Number** for the account (optional).
7. Add the **DUNS Number** (optional). This is the Data Universal Numbering system number.
8. Add the **CAGE Code** (optional). This is the Commercial and Government Entity Code.
9. Add the **Congressional District** (optional).
10. Add the **EIN / Federal Tax ID** number. This is the federal Employer Identification Number.
11. Add the organization **Website** (optional).

Description

12. Add an organization **Description** (optional).

Record Information

13. Add a **Unique Identifier** (optional).
14. Select *Status* as **Enabled**.
15. Click **Update**.

Icons

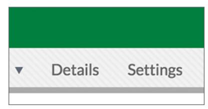
Print
Help
Edit

Account Settings

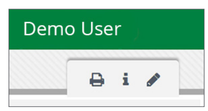
The *Settings tab* displays your account's password and Research settings. These settings will provide default settings for the account.

How To Add/Edit Account Settings

1. Open **Administration>License Information**.
2. Open the **Settings tab**.

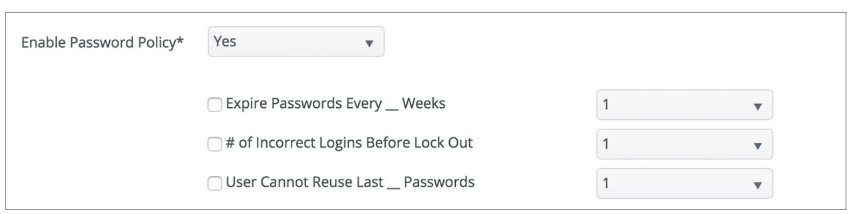


3. Click the **(Edit icon)** in the *Icon Bar*.



Password Policy

4. Select whether to **Enable Password Policy** which includes password expiration, lockout, and password reuse. If password policy is not enabled, passwords will not expire, users will not be locked out because of incorrect login attempts, and all passwords can be reused.



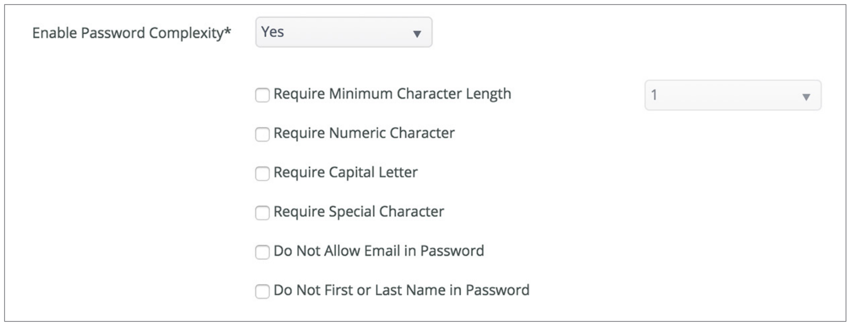
   a. Check the **Expire Passwords Every __ Weeks checkbox** to set password expiration frequency. Select the **number of weeks** passwords will be valid in the dropdown. If unchecked, passwords will not expire.

   b. Check the **# of Incorrect Logins Before Lock Out checkbox** to set lockout policy. Select the **number of incorrect logins before lockout** in the dropdown. If unchecked, users will not be locked out because of incorrect login attempts. To unlock an account, see How To Unlock a Locked User Account.

   c. Check the **User Cannot Reuse Last __ Passwords** checkbox to set number of passwords that cannot be reused. Select **number of**

passwords that cannot be reused in the dropdown. If unchecked, all passwords can be reused.

5. Select whether to **Enable Password Complexity**. If password complexity is not enabled, passwords will have no complexity requirements.



   a. Check the **Require Minimum Character Length checkbox** to set minimum length of password. Select the **number of characters required** in the dropdown. If this checkbox is left unchecked, passwords can be any length.

   b. Check the **Require Numeric Characters checkbox** to require at least one number in the password. If unchecked, passwords can be letters only.

   c. Check the **Require Capital Letters checkbox** to require at least one capital letter in the password. If unchecked, passwords can be any case.

   d. Check the **Require Special Characters checkbox** to require at least one symbol or punctuation mark in the password. If unchecked, passwords can be letters only.

   e. Check the **Do Not Allow Email in Password checkbox** to require that the user's email address cannot be part of the password. If unchecked, passwords can be the same as the email login.

   f. Check the **Do Not First or Last Name in Password checkbox** to require that the user's first or last name cannot be part of the password. If unchecked, passwords can be user's first and/or last name.

Research Settings

6. Select **Default Organization Types** for opportunity searches.
7. Select **Default Locations** for opportunity searches.
8. Click **Update**.