



Administration User Guide

Contents

6	<i>Administration Overview</i>
7	<i>License Information</i>
8	License Information
8	How To Add/Edit Account Details
10	Account Settings
10	How To Add/Edit Account Settings
14	Lead Recipients
14	How To Add a Lead Recipient
15	How To Import Lead Recipients
16	Sub-Recipients
16	How To Add a Sub-Recipient
17	How To Import Sub-Recipients
18	<i>System Administration</i>
19	Activity Log
19	How To View Activity Log
19	How To Export Activity Log
20	Workflow Instances
20	How To View a Workflow Instance
20	How To Add a Workflow Instance
21	How To Edit a Workflow Instance
21	How To Copy a Workflow Instance
22	How To Delete a Workflow Instance
22	How To Disable a Workflow Instance
22	How To Restore a Deleted Workflow Instance
24	Workflow Queues
24	How To View a Workflow Queue
24	How To Add a Workflow Queue
25	How To Edit a Workflow Queue
25	How To Delete a Workflow Queue
25	How To Change the Initial Queue
26	How To Reorder Actions in the Queue
27	Workflow Actions
27	How To View a Workflow Action
27	How To Add a Workflow Action
28	How To Edit a Workflow Action

- 28 How To Delete a Workflow Action
- 30 System Security**
- 31 Users**
 - 31 How To View a User
 - 31 How To Add a New User
 - 33 How To Edit a User
 - 33 How To Delete a User
 - 33 How To Disable a User
 - 34 How To Purge a User
 - 34 How To Restore a Deleted User
 - 35 How To Import Users
 - 35 How To Act as a User
 - 36 How To Invite a User to AmpliFund
 - 36 How To Invite Multiple Users to AmpliFund
 - 37 How To Unlock a Locked User Account
- 38 Departments**
 - 38 How To View a Department
 - 38 How To Add a Department
 - 38 How To Edit a Department
 - 39 How To Delete a Department
 - 39 How To Import Departments
 - 39 How To View All Members in a Department
- 40 Lists**
- 41 Subjects**
 - 41 How To Add a Subject
 - 41 How To Edit a Subject
 - 41 How To Purge a Subject
 - 42 How To Import Subjects
- 43 Budget Categories**
 - 43 How To Add a Budget Category
 - 43 How To Edit a Budget Category
 - 44 How To Delete a Budget Category
 - 44 How To Import Budget Categories
- 45 Fund Activity Categories**
 - 45 How To View Fund Activity Categories
- 46 Benefit Types**
 - 46 How To Add a Benefit Type
 - 46 How To Edit a Benefit Type
 - 46 How To Delete a Benefit Type
 - 47 How To Import Benefit Types

48	GL Accounts
48	How To Customize GL Accounts
48	How To Add a GL Account
49	How To Edit a GL Account
49	How To Delete a GL Account
49	How To Import GL Accounts
50	How To View GL Account Connections
51	Note Types
51	How To Add a Note Type
51	How To Edit a Note Type
51	How to Purge a Note Type
52	Actuals
53	Expenses
53	How To View an Expense Import
53	How To Delete an Expense Import
53	How To Import Expenses
54	How To Split an Expense
55	How To Delete an Expense
55	How To Restore a Deleted Expense
57	HR Actuals (Personnel)
57	How To View an HR Actuals Import
57	How To Import HR Actuals
58	How To Apply HR Actuals
59	Custom
60	Form Extension Library
60	How To Add a Form Extension
62	How To Edit a Form Extension
62	How To Copy a Form Extension
62	How To Delete a Form Extension
63	How to Publish a Form Extension
63	How to Unpublish a Form Extension
64	Forms Library
64	How To Add a Form
66	How To Edit a Form
67	How To Copy a Form
67	How To Delete a Form
67	How to Publish a Form
67	How to Unpublish a Form
68	Appendix

69 Security Roles
70 Implicit Security Roles

Administration Overview

The *Administration* module is only available to Organizational Admin users and shows information and settings for the organization's AmpliFund account. The module contains the account's License Information, System Administration (for clients with the *Workflow* module), System Security, Lists, and Actuals. Within this module, Organization Admin may set account settings, user security roles, send user invitations, update and manage lists, and import actual expenses.

License Information

The License Information section of the *Administration* module contains license information Details, account Settings, Lead Recipients (for clients with Lead Recipient Licenses), and Sub-Recipients (for clients with Sub-Recipient Licenses).

Icons

- | | |
|---|-------|
|  | Print |
|  | Help |
|  | Edit |

License Information

License Information contains details about your AmpliFund account, such as your organization's name, contact information, and product and licensing information. The license information is created during account set up and may be updated as needed.

How To Add/Edit Account Details

From the *Details tab*, Organizational Admin can edit the organization information, primary contact information, description, and record information. To update your product and licensing information, contact your AmpliFund Customer Success Representative or submit a ticket through our support site, amplifund.zendesk.com.

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).
12. Add the organization **Submission Website**, **Submission Website Username**, and **Submission Website Password** (optional). This is the website for online grant application submissions.
13. Select the **Funding Cycle**.

14. Add a **Funding Cycle Description** (optional).

Description

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

Record Information

16. Add a **Unique Identifier** (optional).

17. Select *Status* as **Enabled**.

18. Click **Update**.

Icons

-  Print
-  Help
-  Edit

Account Settings

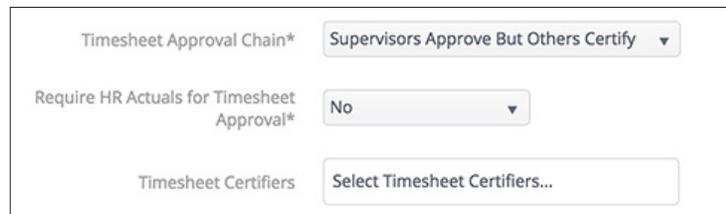
The *Settings tab* displays your account, password, budget, risk analysis, applicant portal (for clients with the *Competitive Award Management* module), timesheet (for clients with the *Time & Effort Certification* module), and research settings (for clients with the *Research* module). These settings will provide default settings for all records in the account. In many cases, the settings can be overridden on the record level or lower, such as the grant settings or budget line item settings.

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*.

Settings

4. Select the **Organization Fiscal Year Start Month**.
5. Select the **Organization Work Week Start Day** and add the **Organization Work Week Length**.
6. Select the **Timesheet Approval Chain**.
 - a. If *Supervisors Approve But Others Certify* is selected, select **Timesheet Certifiers**. This list pulls from *Administration>System Security>Users*.



7. Select **Require HR Actuals for Timesheet Approval** as necessary.
8. Select **Accounting Method**.
 - **None:** No accounting method selected.
 - **Cash:** Transactions are recorded when money is received or paid.
 - **Accrual:** Transactions are recorded as earned regardless of when money is received or paid.
9. Add **Commercial And Government Entity Code**, **Employer Identification Number**, and **Congressional District** (optional).

10. Add **FICA Rate**.

Matching

11. Select **Matching Required** as necessary.

- a. If Yes, select **Default Cash Match** and add **Cash Match Percentage or Amount** as necessary.
- b. Select the **Default In-Kind Match for Personnel** line items and add **In-Kind Match Percent or Amount** as necessary.
- c. Select the **Default In-Kind Match for Non-Personnel** line items and add **In-Kind Match Percent or Amount** as necessary.

Indirect Cost Rate

12. Select to **Track Indirect Cost Rate**.

- a. If Yes is selected for *Track Indirect Cost Rate* and *Matching Required*, select to **Include Indirect On Match**.

13. Select **Federal Rate Type**.

14. Add **Federal Negotiated Rate** and **Non Federal Rate**.

GL Account Definition

15. Select **Yes** in each *Account Code's dropdown* to activate the code type. You can use up to 6 code types.

16. In the fields below the dropdowns, add a **new code type name** (i.e. "Organization Code").

Risk Definition

17. In the *Reporting* section, check the **Monitor Reporting Risk checkbox** if desired. This calculates recipient reporting risk as the number of days a report is past due for a reporting period.

- a. Add the **Low, Medium, and High** risk thresholds for number of days past due.

18. In the *Budget* section, check the **Monitor Budget Risk checkbox** if desired. This calculates recipient budget risk as budget variance.

- a. Add the **Low, Medium, and High** risk thresholds for percent within total budget.

19. In the *Performance* section, check the **Monitor Performance Risk checkbox** if desired. This calculates recipient performance risk as the total percentage of performance goals out of allocation.

- a. Add the **Low, Medium, and High** risk thresholds for percent of goals

on target.

Applicant Portal Settings

20. In the *Change Organization Logo* field, click **Select files...** to select a file from your computer. AmpliFund supports JPG and PNG image files.
21. Add application **Help Description** (optional). This description will be visible to applicants.
22. Add application **Help Email, Help Name, and Help Phone Number** (optional).
23. Add a **Technical Help Description** (optional). This description will be visible to applicants.
24. Add a **Technical Help Email, Technical Help Name, and Technical Help Phone Number** (optional).

Password Policy

25. 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.
26. 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

- 27. Select **Default Organization Types** for opportunity searches.
- 28. Select **Default Locations** for opportunity searches.
- 29. Click **Update**.

Icons

-  Print
-  Help
-  Create
-  Import

Lead Recipients

For clients with Lead Recipient Licenses

The Lead Recipients list allows funding organizations to add their award recipients. Once added, funding organizations can select recipients for awards from *Fund Management>Awards* and invite recipients to AmpliFund to manage their awards. Recipients added in the *Administration* module will also be listed under *Contacts>Lead Recipients*.

The Lead Recipients list shows the *Organization, Primary Email Address, Primary Phone Number, License Assigned On, License Required, Status, and Active* columns by default. Each of these columns may be shown or hidden, sorted, or filtered.

See the [AmpliFund User Interface Navigation Guide](#) to learn more about sorting and filtering list views.

Note

The recipient will not receive an invitation email to AmpliFund until their award is activated.

How To Add a Lead Recipient

1. Open **Administration>License Information**.
2. Open the **Lead Recipients** tab.
3. Click the **+** (**Create icon**) in the *Icon Bar*.

Organization Information

4. Add the account **Name**.
5. Add the **DBA Name** (optional). This is an alternative name the organization does business under.
6. Select the **Organization Type**.
7. Add the **Primary Address, Primary Email Address, and Primary Phone Number** for the account (optional).
8. Add the **DUNS Number** (optional). This is the Data Universal Numbering system number.
9. Add the organization **Website** (optional).
10. Add the organization **Submission Website, Submission Website Username, and Submission Website Password** (optional). This is the website for online grant application submissions.
11. Select the **Funding Cycle**.
12. Add a **Funding Cycle Description** (optional).

Description

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

Record Information

14. Add a **Unique Identifier** (optional).

15. Select *Status* as **Enabled**.

16. Click **Create**.

How To Import Lead Recipients

Organizational Admin can import multiple recipients using the [Recipients Import Template](#) (recommended) or their own Excel file. The Recipients Import Template includes the *Recipient Name**, *DBA Name*, *Organization Type**, *Address Line 1*, *Address Line 2*, *City*, *State*, *Zip Code*, *Country*, *Email Address**, *Country Code*, *Phone Number*, *Extension*, *DUNS Number*, *Website*, *Submission Website*, *Submission Website Username*, *Submission Website Password*, *Funding Cycle*, *Funding Cycle Description*, *Description*, *Unique Identifier*, and *Status** fields. Required fields have asterisks (*) next to their names.

1. Open **Administration>License Information**.
2. Open the **Lead Recipients** tab.
3. Click the (**Import icon**) in the *Icon Bar*.
4. In the pop-up window, click **Choose a file** to select a file from your computer.
5. Click **Create New** to create default mapping or select an existing default map (optional). A default map can be useful if you use the same file template for importing recipients.
6. Select the **Destination** field for each *Source* column. If you are using the [Recipients Import Template](#) (recommended), the source and destination fields should match.
7. Click **Create**.

Icons

-  Print
-  Help
-  Create
-  Import

Sub-Recipients

For clients with Sub-Recipient Licenses

The Sub-Recipients list allows funding organizations to add their grant sub-award recipients. Once added, funding organizations can select sub-recipients for sub-awards from a grant's *Post-Award tab>Sub-Awards* and invite sub-recipients to AmpliFund to manage their sub-awards. Sub-recipients added in the *Administration* module will also be listed under *Contacts>Sub-Recipients*.

The Sub-Recipients list shows the *Organization, Primary Email Address, Primary Phone Number, License Assigned On, License Required, Status, and Active* columns by default. Each of these columns may be shown or hidden, sorted, or filtered.

See the [AmpliFund User Interface Navigation Guide](#) to learn more about sorting and filtering list views.

Note

The recipient will not receive an invitation email to AmpliFund until their award is activated.

How To Add a Sub-Recipient

1. Open **Administration>License Information**.
2. Open the **Lead Recipients tab**.
3. Click the **+** (**Create icon**) in the *Icon Bar*.

Organization Information

4. Add the account **Name**.
5. Add the **DBA Name** (optional). This is an alternative name the organization does business under.
6. Select the **Organization Type**.
7. Add the **Primary Address, Primary Email Address, and Primary Phone Number** for the account (optional).
8. Add the **DUNS Number** (optional). This is the Data Universal Numbering system number.
9. Add the organization **Website** (optional).
10. Add the organization **Submission Website, Submission Website Username, and Submission Website Password** (optional). This is the website for online grant application submissions.
11. Select the **Funding Cycle**.
12. Add a **Funding Cycle Description** (optional).

Description

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

Record Information

14. Add a **Unique Identifier** (optional).

15. Select *Status* as **Enabled**.

16. Click **Create**.

How To Import Sub-Recipients

Organizational Admin can import multiple recipients using the [Recipients Import Template](#) (recommended) or their own Excel file. The Recipients Import Template includes the *Recipient Name**, *DBA Name*, *Organization Type**, *Address Line 1*, *Address Line 2*, *City*, *State*, *Zip Code*, *Country*, *Email Address**, *Country Code*, *Phone Number*, *Extension*, *DUNS Number*, *Website*, *Submission Website*, *Submission Website Username*, *Submission Website Password*, *Funding Cycle*, *Funding Cycle Description*, *Description*, *Unique Identifier*, and *Status** fields. Required fields have asterisks (*) next to their names.

1. Open **Administration>License Information**.
2. Open the **Sub-Recipients** tab.
3. Click the (**Import icon**) in the *Icon Bar*.
4. In the pop-up window, click **Choose a file** to select a file from your computer.
5. Click **Create New** to create default mapping or select an existing default map (optional). A default map can be useful if you use the same file template for importing recipients.
6. Select the **Destination** field for each *Source* column. If you are using the [Recipients Import Template](#) (recommended), the source and destination fields should match.
7. Click **Create**.

System Administration

The System Administration section of the *Administration* module allows users to view the account Activity Log and create and manage workflows (for clients with Competitive Award Management or Workflow). For more information about the *Workflow* module, see the [AmpliFund Workflow User Guide](#).

Icons

-  Print
-  Help
-  Export

Activity Log

The Activity Log captures account changes and includes information on user and time, type, and location of the change.

How To View Activity Log

1. Open **Administration>System Administration>Activity Log**.
2. Select a **Start Date** and **End Date**.
3. Click **View Log**.

How To Export Activity Log

1. Open **Administration>System Administration>Activity Log**.
2. Select a **Start Date** and **End Date**.
3. Click **View Log**.
4. Click  (**Export Icon**) in the *Icon Bar*.
5. In the pop-up window, add **File Name**.
6. Select **Export File Type**.
7. Click **Export**.

Icons

	Print
	Help
	Expand
	Collapse
	Initial Queue
	Create
	Edit
	Configure
	Copy
	Delete
	Restore
	Move Up
	Move Down

Workflow Instances

For clients with Competitive Award Management or Workflow

The *Workflow* module allows clients to build customized workflows to match business processes. Workflow instances are comprised of queues (phases or stopping points) and actions. For more information about the *Workflow* module, see the [AmpliFund Workflow User Guide](#).

The Workflow Instances list shows the *Name*, *Object Type*, *Objects Currently Enrolled*, and *Status* columns by default. The *Created By* column is also available. Each of these columns may be shown or hidden, sorted, or filtered. The page can also be filtered by Workflow Type: Grant or Opportunity Application.

See the [AmpliFund User Interface Navigation Guide](#) to learn more about sorting and filtering list views.

How To View a Workflow Instance

The Workflow Instance details page shows the object type, workflow name, description, initial queue, notification alerts, days since last action, and current users.

1. Open **Administration>System Administration>Workflow**.
2. Click a **workflow instance name**.

How To Add a Workflow Instance

Workflow instances contain queues and actions related to one process. Workflow instances can only be related to one object type, such as grants or opportunities.

1. Open **Administration>System Administration>Workflow**.
2. Click the **+** (**Create icon**) in the *Icon Bar*.

Workflow Details

3. Select the **Object Type**.

- **Opportunity Application:** Evaluation processes that can include evaluation, scoring, re-opening, rejecting, and approving submitted applications.
- **Grant:** Evaluation processes most commonly used for pre-award organizational approval to submit or post-award organizational

Note

Once the workflow instance is created, the object type cannot be edited.

approval to request changes to grant.

4. Add the workflow instance **Name**.
5. Add the **Description** (optional).

Notifications

6. Select to receive **Action Alerts** emails.
 - a. Select number of **Days Since Last Action** to set the alert.
 - b. Select **Users** to be notified (optional).

Record Information

7. Add a **Unique Identifier** (optional).
8. Click **Create**.

How To Edit a Workflow Instance

1. Open **Administration>System Administration>Workflow**.
2. Click the  (**Edit icon**) next to a workflow instance name.

Name	Object Type
Opportunity Application Review  	Opportunity Application

3. Update the information as necessary.
4. Click **Save**.

How To Copy a Workflow Instance

Copying a workflow instance will copy all workflow queues, actions, and responsible users contained in that instance.

1. Open **Administration>System Administration>Workflow**.
2. Click the  (**Copy icon**) next to a workflow instance name.

Name	Object Type
Opportunity Application Review  	Opportunity Application

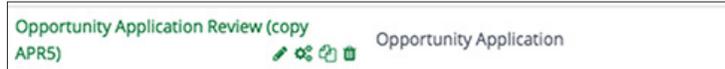
3. Update the information as necessary.
4. Click **Save**.

How To Delete a Workflow Instance

Prerequisite: Workflow instances cannot be in use or have been used.

Once a workflow instance has been deleted, it may be [restored](#) to return it to Workflow Instances list.

1. Open **Administration>System Administration>Workflow**.
2. Click the  (**Delete icon**) next to a workflow instance name.



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

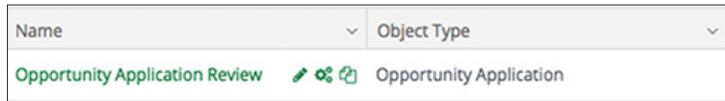
How To Disable a Workflow Instance

Prerequisite: Workflow instance cannot be in use.

Disabling a workflow instance removes it from the Workflow Instances list.

Disabled workflow instances can be enabled at any time.

1. Open **Administration>System Administration>Workflow**.
2. Click the  (**Edit icon**) next to a workflow instance name.



3. In the *Record Information* section, select **Disabled** from the *Status* dropdown.

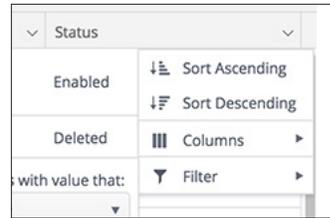


4. Click **Save**.

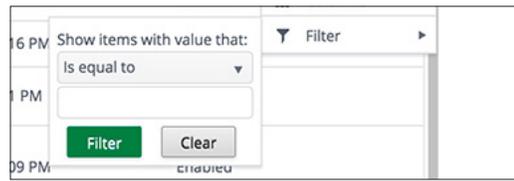
How To Restore a Deleted Workflow Instance

Deleted workflow instances may be restored at any time.

1. Open **Administration>System Administration>Workflow**.
2. Click the  (**Menu icon**) in the *Status* column.



3. Hover over **Filter** to show filter menu.
4. In the filter menu, click **Clear** to show deleted and disabled workflow instances.



5. Click the **⊕ (Restore icon)** next to a deleted workflow instance name.
6. In the pop-up confirmation window, click **Restore**.

Icons

- Print
- Help
- Expand
- Collapse
- Initial Queue
- Create
- Edit
- Configure
- Copy
- Delete
- Restore
- Move Up
- Move Down

Workflow Queues

For clients with Competitive Award Management or Workflow

Workflow queues are phases or stopping points within a workflow instance. Queues contain workflow actions. For more information about the *Workflow* module, see the [AmpliFund Workflow User Guide](#).

The Workflow Queues list shows the *Name*, *Description*, *Initial Queue*, and *Status* columns by default. Each of these columns may be shown or hidden, sorted, or filtered.

See the [AmpliFund User Interface Navigation Guide](#) to learn more about sorting and filtering list views.

How To View a Workflow Queue

1. Open **Administration>System Administration>Workflow**.
2. Click the (**Configure icon**) next to a workflow instance name.

Name	Object Type
Opportunity Application Review	Opportunity Application

3. Click a **workflow queue name**.

How To Add a Workflow Queue

1. Open **Administration>System Administration>Workflow**.
2. Click the (**Configure icon**) next to a workflow instance name.

Name	Object Type
Opportunity Application Review	Opportunity Application

3. Click **Add Workflow Queue +**.

Workflow Queues

[Add Workflow Queue +](#)

4. In the pop-up window, add the workflow queue **Name**.
5. Add the **Description** (optional).
6. For opportunity applications, if the object will change status when entering the queue, select the **status** in the *Change Submission Status To*

dropdown (optional).

7. Select **Users** attached to the queue and click **Add** (optional).
8. Click **Save**.

How To Edit a Workflow Queue

1. Open **Administration>System Administration>Workflow**.
2. Click the  (**Configure icon**) next to a workflow instance name.

Name	Object Type
Opportunity Application Review 	Opportunity Application

3. Click the  (**Edit icon**) next to a workflow queue name.

> Application Scoring 

4. Update the information as necessary.
5. Click **Save**.

Note

Deleted workflow queues cannot be restored.

How To Delete a Workflow Queue

Prerequisite: The queue cannot be a destination queue from a send-to-queue workflow action.

1. Open **Administration>System Administration>Workflow**.
2. Click the  (**Configure icon**) next to a workflow instance name.

Name	Object Type
Opportunity Application Review 	Opportunity Application

3. Click the  (**Delete icon**) next to a workflow queue name.

> Application Scoring 

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

How To Change the Initial Queue

The initial queue is the first queue an object will enter when enrolled in a workflow instance. A workflow instance must have an initial queue; an initial queue is automatically created when you add a workflow instance.

1. Open **Administration>System Administration>Workflow**.
2. Click the  (**Edit icon**) next to a workflow instance name.

Name	Object Type
Opportunity Application Review   	Opportunity Application

3. Select the **Initial Queue**. This list pulls from the instance's workflow queues.

Initial Queue	Initial Review for Completeness 
---------------	---

4. Click **Save**.

How To Reorder Actions in the Queue

1. Open **Administration>System Administration>Workflow**.
2. Click the  (**Configure icon**) next to a workflow instance name.

Name	Object Type
Opportunity Application Review   	Opportunity Application

3. Click the  (**Expand icon**) next to a workflow queue.

 Application Scoring  

4. Click the  (**Move Up icon**) or  (**Move Down icon**) next to an action name to move the action up or down in the queue, respectively.

 Initial Review for Completeness   
  Review Application  
  Add Application Attachment  

Icons

-  Print
-  Help
-  Expand
-  Collapse
-  Initial Queue
-  Create
-  Edit
-  Configure
-  Copy
-  Delete
-  Restore
-  Move Up
-  Move Down

Workflow Actions

For clients with Competitive Award Management or Workflow

Workflow actions are contained in workflow queues. Available workflow actions may vary depending on the workflow object type. For more information about the *Workflow* module, see the [AmpliFund Workflow User Guide](#).

How To View a Workflow Action

1. Open **Administration>System Administration>Workflow**.
2. Click the  (**Configure icon**) next to a workflow instance name.

Name	Object Type
Opportunity Application Review   	Opportunity Application

3. Click the  (**Expand icon**) next to a workflow queue name.

 Application Scoring   

4. Click a **queue action name**.

How To Add a Workflow Action

1. Open **Administration>System Administration>Workflow**.
2. Click the  (**Configure icon**) next to a workflow instance name.

Name	Object Type
Opportunity Application Review   	Opportunity Application

3. Click the  (**Create icon**) next to a workflow queue name.

 Initial Review for Completeness    

4. In the pop-up window, add the workflow action **Name**.
5. Add the **Description** (optional).
6. Select the **Workflow Action Type**.
 - **Add Attachment:** Prompts users to attach a file and mark the workflow action as complete.
 - **Award Applicant:** Creates an award for an applicant from an opportunity.
 - **Complete Task:** Sends users a task that they can mark as complete and

include comments.

- **Create Related Item:** Creates an Opportunity Application Review or Opportunity Application Completed Form item. The Opportunity Application Review item allows responsible users to indicate if they have reviewed the application. The Opportunity Application Completed Form item allows users to score the application.
 - **Remove from Workflow:** Removes object from workflow instance.
 - **Send to Queue:** Sends object to destination workflow queue.
7. Select **Users** attached to the action and click **Add** (optional).
 8. Click **Save**.

How To Edit a Workflow Action

1. Open **Administration>System Administration>Workflow**.
2. Click the  (**Configure icon**) next to a workflow instance name.

Name	Object Type
Opportunity Application Review   	Opportunity Application

3. Click the  (**Expand icon**) next to a workflow queue.

 Application Scoring   

4. Click the  (**Edit icon**) next to an action name.

 Initial Review for Completeness    
  Review Application  

5. In the pop-up window, update the information as necessary.
6. Click **Save**.

How To Delete a Workflow Action

1. Open **Administration>System Administration>Workflow**.
2. Click the  (**Configure icon**) next to a workflow instance name.

Name	Object Type
Opportunity Application Review   	Opportunity Application

3. Click the  (**Expand icon**) next to a workflow queue.

 Application Scoring   

4. Click the  (Delete icon) next to an action name.



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

System Security

The System Security section of the *Administration* module allows Organizational Admin to add and manage Users and Departments.

Icons

	Print
	Help
	Save Current View
	Create
	Import
	Invite to AmpliFund
	Edit
	Trash
	Unlock Account

Users

AmpliFund uses your email address as your username. Once created, a user cannot change their username. However, they can update their primary email address as necessary.

The Users list shows the *Display Name*, *Role*, *Invitation Sent*, and *Status* columns by default. Each of these columns may be shown, hidden, sorted, or filtered.

See the [AmpliFund User Interface Navigation Guide](#) to learn more about sorting and filtering list views.

How To View a User

1. Open **Administration>System Security>Users**.
2. Click a **user display name**.

How To Add a New User

You can add a new user to AmpliFund in the *Administration* module, or convert an existing staff record to a user record. For more information on converting a staff member to a user, see the [AmpliFund Contact Management User Guide](#).

1. Open **Administration>System Security>Users**.
2. Click the **+** (**Create icon**) in the *Icon Bar*.

User Information

3. Select if the user will **Subscribe to Daily Emails** or **Subscribe to Weekly Emails**. Once the user activates their account, they can update their email subscription preferences.
4. For clients with the *Grant Research* module, select if the user will have **Research Module Access**.
5. For clients with the *Competitive Award Management* module, select if the user will have **Applicant Portal Access**.
6. Select the user security **Role**. For more details, see [Security Roles](#).
 - **Organizational Admin:** Can create, view, and edit all records in the account.
 - **Executive:** Can view all records in the account.

- **Department Admin:** Can create, view, and edit all grant and project records linked to their department(s).
- **Department User (Salary):** Can view all grant and project records linked to their department(s).
- **Department User (No Salary):** Can view all grant and project records linked to their department(s), excluding budget personnel line items.
- **Project Admin:** Can create, view, and edit all project records.
- **Project User (Salary):** Can view and edit all projects assigned to them and view any grants linked to their projects.
- **Project User (No Salary):** Can view and edit all projects assigned to them and view any grants linked to their projects, excluding budget personnel line items.
- **Fund Admin:** Can create, view, and edit all fund, opportunity, and award records.
- **Fund User (Salary):** Can create, view, and edit all opportunity and award records and assigned fund records.
- **Fund User (No Salary):** Can create, view, and edit all opportunity and award records and assigned fund records, excluding budget personnel line items.
- **Researcher:** Only has access to the *Grant Research* module; cannot apply for or manage grants.

Staff Information

7. Add the user's **First Name** and **Last Name**.
8. Add the user's job **Title** (optional).
9. Select the user's **Supervisor** (optional). This list pulls from *Contacts>Staff*.
10. In the *Track Time* dropdown, select how frequently the user will **track their time** for timesheets.
11. Add the user's **primary address** (optional).
12. Add the user's **primary email address**.
13. Add the user's **primary phone number** (optional).

Note

AmpliFund login usernames (i.e., the user's email address) cannot be edited in the system. However, you can update a user's primary email address as necessary. If you need to change the AmpliFund username, you can submit a ticket to our help desk at amplifund.zendesk.com.

Description

14. Add a **Description** (optional).

Record Information

15. Add a **User Identifier** (optional).

16. In the *Status* dropdown, select **Enabled**.
17. Click **Create**.

How To Edit a User

1. Open **Administration>System Security>Users**.
2. Click on a **user display name**.
3. Click the  (**Edit icon**) in the *Icon Bar*.
4. Update the information as necessary.
5. Click **Update**.

How To Delete a User

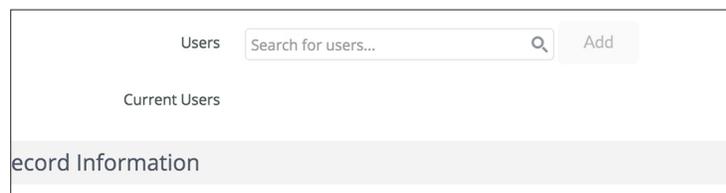
Once a user record has been deleted, it may be [purged](#) to remove it permanently from AmpliFund, or it may be [restored](#) to return it to User list.

1. Open **Administration>System Security>Users**.
2. Click on a **user display name**.
3. Click the  (**Delete icon**) in the *Icon Bar*.
4. In the confirmation pop-up window, click **Delete**.

How To Disable a User

Disabling a user record removes it from the User list. Disabled user records can be enabled at any time. Once a user record is disabled, the user will no longer be able to log in to AmpliFund. Disabling the record is recommended for temporarily suspending a user's access to AmpliFund.

1. Open **Administration>System Security>Users**.
2. Click on a **user display name**.
3. Click the  (**Edit icon**) in the *Icon Bar*.
4. In the *Record Information* section, select **Disabled** in the *Status* dropdown.



5. Click **Update**.

Note

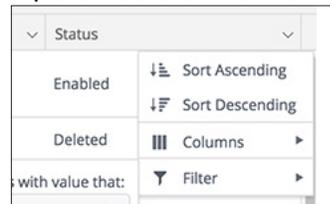
Purged records cannot be restored or recovered.

How To Purge a User

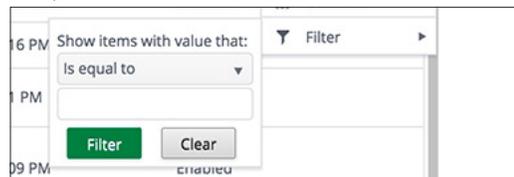
Prerequisite: User record must be deleted.

Deleted user records can be purged to permanently remove them from AmpliFund. Once purged, a user would need to be re-added in order to regain access to AmpliFund.

1. Open **Administration>System Security>Users**.
2. Click the **▼ (Menu icon)** in the *Status* column.



3. Hover over **▼ Filter** to show filter menu.
4. In the filter menu, click **Clear** to show deleted and disabled users.

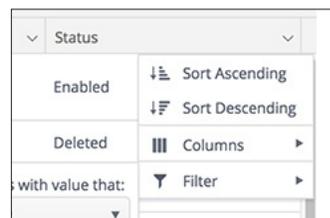


5. Click a **deleted user display name**.
6. Click the **✕ (Purge icon)** in the *Icon Bar*.
7. In the confirmation pop-up window, click **Purge**.

How To Restore a Deleted User

Deleted user records may be restored at any time.

1. Open **Administration>System Security>Users**.
2. Click the **▼ (Menu icon)** in the *Status* column.



3. Hover over **▼ Filter** to show filter menu.
4. In the filter menu, click **Clear** to show deleted and disabled users.
5. Click a **deleted user display name**.

6. Click the  (**Restore icon**) in the *Icon Bar*.
7. In the confirmation pop-up window, click **Restore**.

How To Import Users

Organizational Admin can import multiple users using the [Users Import Template](#) (recommended) or their own Excel file. The Users Import Template includes the *First Name**, *Last Name**, *Title*, *Supervisor First Name*, *Supervisor Last Name*, *Track Time**, *Address Line 1*, *Address Line 2*, *City*, *State*, *Zip Code*, *Country*, *Email Address**, *Country Code*, *Phone Number*, *Extension*, *Description*, *Unique Staff Identifier*, *Unique User Identifier*, *Daily Digest Email*, *Weekly Digest Email*, *Research Module Access*, *Applicant Portal Access*, *Role**, and *Department(s)* fields. Required fields have asterisks (*) next to their names.

1. Open **Administration>System Security>Users**.
2. Click the  (**Import icon**) in the *Icon Bar*.
3. In the pop-up window, click **Choose a file** to select a file from your computer.
4. Click **Create New** to create default mapping or select an **existing default map** (optional). A default map can be useful if you use the same file template for importing users.
5. Select the **Destination** field for each *Source* column. If you are using the [Users Import Template](#) (recommended), the source and destination fields should match.
6. Click **Create**.

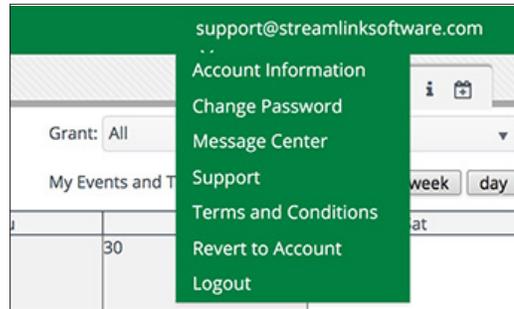
How To Act as a User

Note

Any action taken while acting as a user will be recorded as an action completed by that user.

Organizational Admin can view another user's account and act as the user. This allows Organizational Admin to view AmpliFund from other users' security roles and to mark progress on items on their behalf.

1. Open **Administration>System Security>Users**.
2. Click on a **user display name**.
3. Click the  (**Act as User icon**) in the *Icon Bar*.
4. In the confirmation pop-up window, click **Act as User**. You will see the user's name in the top-right corner of AmpliFund.
5. To return to your account, open **User Navigation Menu>Revert to Account**.



6. In the confirmation pop-up window, click **Revert to Account**.

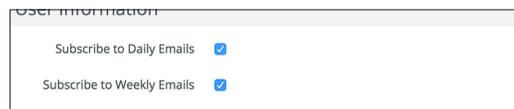
How To Invite a User to AmpliFund

On the Users list, you can view which users have been sent invitations in the *Invitation Sent* column. Invitations will be sent from the email address no-reply@gotomygrants.com. You can resend invitations as needed.

1. Open **Administration>System Security>Users**.
2. Click on a **user display name**.
3. Click the (**Invite to AmpliFund icon**) in the *Icon Bar*.
4. In the confirmation pop-up window, click **Send Invitation**.

How To Invite Multiple Users to AmpliFund

1. Open **Administration>System Security>Users**.
2. Click the (**Invite to AmpliFund icon**) in the *Icon Bar*.
3. Select **users** or check the **Select All** checkbox.



4. Click the (**Invite to AmpliFund icon**) under *Actions*.



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

How To Unlock a Locked User Account

A user's account may become locked after exceeding the maximum number of incorrect logins as set in *License Information>Settings*.

1. Open **Administration>System Security>Users**.
2. Click a locked **user name**.
3. Click the  (**Unlock Account icon**) in the *Icon Bar*.
4. In the confirmation pop-up window, click **Confirm**.

Icons

-  Print
-  Help
-  Save Current View
-  Create/Add
-  Import
-  Export
-  Edit
-  Delete

Departments

Departments can be used to link user, grant, project, and timesheet (for clients with *Time & Effort Certification*) records. The Department Admin, User (Salary), and User (No Salary) security roles have access to any record linked to their department(s).

The Departments list shows the *Name* and *Status* columns by default. In addition, the *Id*, *Description*, *Unique Identifier*, and *Member Count* columns can be shown. Each of these columns may be shown, hidden, sorted, or filtered.

See the [AmpliFund User Interface Navigation Guide](#) to learn more about sorting and filtering list views.

How To View a Department

1. Open **Administration>System Security>Departments**.
2. Click a **department name**.

How To Add a Department

1. Open **Administration>System Security>Departments**.
2. Click the **+** (**Create icon**) in the *Icon Bar*.

Department Information

3. Add the department **Name**.
4. Add a **Description** (optional).

Record Information

5. Add a **Unique Identifier** (optional).
6. In the *Status* dropdown, select **Enabled**.
7. Click **Create**.

How To Edit a Department

1. Open **Administration>System Security>Departments**.
2. Click the  (**Edit icon**) next to a department name.



3. Update the information as necessary.
4. Click **Update**.

How To Delete a Department

Prerequisite: Cannot be assigned to a grant, project, or user record.

1. Open **Administration>System Security>Departments**.
2. Click the  (**Delete icon**) next to a department name.



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

How To Import Departments

Organizational Admin can import multiple departments using the [Departments Import Template](#) (recommended) or their own Excel file. The Departments Import Template includes the *Name**, *Description*, and *Unique Identifier* fields. Required fields have asterisks (*) next to their names.

1. Open **Administration>System Security>Departments**.
2. Click the  (**Import icon**) in the *Icon Bar*.
3. Click **Select Files...** to select a file from your computer.
4. Click **Next**.
5. Select the **Destination** field for each *Source* column. If you are using the [Departments Import Template](#) (recommended), the source and destination fields should match.
6. Click **Create**.

How To View All Members in a Department

1. Open **Administration>System Security>Departments**.
2. Click a **department name**.
3. Open the **Members tab**.

Lists

The Lists section of the *Administration* module allows Organizational Admin to add and manage Subjects, Budget Categories, Fund Activity Categories, Benefit Types, GL Accounts, and Note Types. These lists will be available for all users throughout the AmpliFund account.

Icons

-  Print
-  Help
-  Save Current View
-  Create
-  Import
-  Export
-  Edit
-  Purge

Subjects

Subjects are keywords that link grant and project records. By including subjects, your grants and projects can be more searchable and manageable. Subjects may be created in the *Administration* module, or from a grant or project record.

The Subjects list shows the *Name* column by default. In addition, the *Id* column can be shown. Each of these columns may be shown, hidden, sorted, or filtered.

How To Add a Subject

Subjects can be created from the Subjects list or from a grant or project record. If a subject is created from a grant or project record, it will appear on the Subjects list.

1. Open **Administration>Lists>Subjects**.
2. Click the **+** (**Create icon**) in the *Icon Bar*.
3. Add the subject **Name**.
4. Click **Create**.

How To Edit a Subject

1. Open **Administration>Lists>Subjects**.
2. Click on a **subject name**.
3. Click the  (**Edit icon**) in the *Icon Bar*.
4. Update the information as necessary.
5. Click **Update**.

Note

Purged records cannot be restored or recovered.

How To Purge a Subject

Prerequisite: Cannot be assigned to a grant or project record.

Subjects can be purged to permanently remove them from AmpliFund.

1. Open **Administration>Lists>Subjects**.
2. Click on a **subject name**.
3. Click the  (**Purge icon**) in the *Icon Bar*.
4. In the confirmation pop-up window, click **Purge**.

How To Import Subjects

Organizational Admin can import multiple subjects using the [Subjects Import Template](#) (recommended) or their own Excel file. The Subject Import Template includes the *Name** field. Required fields have asterisks (*) next to their names.

1. Open **Administration>Lists>Subjects**.
2. Click the  (**Import icon**) in the *Icon Bar*.
3. Click **Select Files...** to select a file from your computer.
4. Click **Next**.
5. Select the **Destination** field for each *Source* column. If you are using the [Subjects Import Template](#) (recommended), the source and destination fields should match.
6. Click **Create**.

Icons

-  Create
-  Import
-  Export
-  Edit
-  Save
-  Revert
-  Trash

Budget Categories

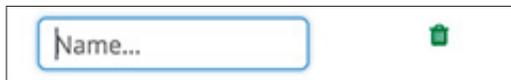
Budget categories group budget line items in the budget and reports. To learn more about adding categories to a budget, see the [AmpliFund Grant Management Guide](#).

The Budget Categories page includes the *Federal Category Information* and *Custom Category Information* sections. The *Federal Category Information* section contains the list of standard federal budget categories. These categories cannot be added to, edited, or removed. Based on a grant's budget settings, federal categories may be used when creating planned expenses.

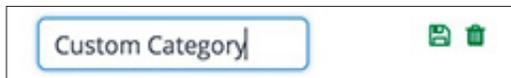
How To Add a Budget Category

Budget categories can be created from the Budget Category page or from a grant, project, or budget line item. If a category is created from a grant, project, or budget line item, it will appear on the Budget Category page.

1. Open **Administration>Lists>Budget Categories**.
2. Click the **+** (**Create icon**) in the *Icon Bar*.
3. In the *Custom Category Information* section, add a **category Name**.



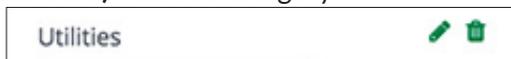
4. Click the **Save icon** next to the category.



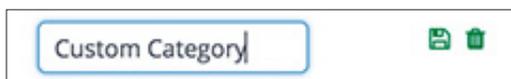
5. Click **Update**.

How To Edit a Budget Category

1. Open **Administration>Lists>Budget Categories**.
2. Click the **edit icon** next to a category.



3. In the *Custom Category Information* section, add a **category Name**.
4. Click the **Save icon** next to the category.



5. Click **Update**.

How To Delete a Budget Category

Prerequisite: Cannot be assigned to a grant or project line item.

1. Open **Administration>Lists>Budget Categories**.
2. Click the  (**Delete icon**) next to a category.



3. Click **Update**.

How To Import Budget Categories

Organizational Admin can import multiple budget categories using the [Budget Categories Import Template](#) (recommended) or their own Excel file. The Budget Categories Import Template includes the *Name** field. Required fields have asterisks (*) next to their names.

1. Open **Administration>Lists>Budget Categories**.
2. Click the  (**Import icon**) in the *Icon Bar*.
3. In the pop-up window, click **Choose a file** to select a file from your computer.
4. Click **Create New** to create default mapping or select an **existing default map** (optional). A default map can be useful if you use the same file template for importing budget categories.
5. Select the **Destination** field for each *Source* column. If you are using the [Budget Categories Import Template](#) (recommended), the source and destination fields should match.
6. Click **Create**.

Fund Activity Categories

For clients with Fund Management

The Fund Activity Categories list shows the standard federal fund activity categories. These categories cannot be added to, edited, or removed. These federal categories may be used when creating funds.

The Fund Activity Categories list shows the *Name* and *Type* columns by default. There are no other columns available. Each of these columns may be shown or hidden, sorted, or filtered.

See the [AmpliFund User Interface Navigation Guide](#) to learn more about sorting and filtering list views.

How To View Fund Activity Categories

1. Open **Administration>Lists>Fund Activity Categories**.

Icons

-  Create
-  Import
-  Export
-  Edit
-  Trash

Benefit Types

The Benefit Types list contains all available benefit options that may be used when planning staff compensation and personnel line items. The default benefit types are FICA Rate Benefit, Fringe Benefit, Medical Benefit, and Retirement Benefit. The default types may be edited or deleted. Users can add other benefit types as needed.

How To Add a Benefit Type

Once a benefit type is added, it will be available on staff compensation history records under *Contacts>Staff>Compensation tab* and line items in a budget.

1. Open **Administration>Lists>Benefit Types**.
2. Click the **+** (**Create icon**) in the *Icon Bar*.
3. In the *Benefit Type Information* section, add a benefit type **Name**.
4. Click the  (**Save icon**) next to the benefit type.



5. Click **Update**.

How To Edit a Benefit Type

1. Open **Administration>Lists>Benefit Types**.
2. Click the  (**Edit icon**) next to a benefit type name.



3. Update the information as necessary.
4. Click the  (**Save icon**) next to the benefit type.
5. Click **Update**.

How To Delete a Benefit Type

Prerequisite: Cannot be assigned to staff compensation history or budget line item; cannot be one of the five default benefit types.

1. Open **Administration>Lists>Benefit Types**.

2. Click the  (Delete icon) next to a benefit type name.



3. Click **Update**.

How To Import Benefit Types

Organizational Admin can import multiple benefit types using the [Benefit Types Import Template](#) (recommended) or their own Excel file. The Benefit Types Import Template includes the Name* field. Required fields have asterisks (*) next to their names.

1. Open **Administration>License Information**.
2. Click the  (Import icon) in the *Icon Bar*.
3. In the pop-up window, click **Choose a file** to select a file from your computer.
4. Click **Create New** to create default mapping or select an **existing default map** (optional). A default map can be useful if you use the same file template for importing benefit types.
5. Select the **Destination** field for each *Source* column. If you are using the [Benefit Types Import Template](#) (recommended), the source and destination fields should match.
6. Click **Create**.

Icons

-  Print
-  Help
-  Save Current View
-  Create
-  Import
-  Export
-  Edit
-  Copy
-  Delete

GL Accounts

GL accounts, or general ledger accounts, are set up to match the GL structure used in your organization. GL accounts are used when creating budget line items, importing non-personnel actual expenses, and reporting. GL accounts can be viewed from *Administration>Lists>GL Accounts*.

The GL Accounts list shows the *GL Name*, *Description*, and *GL Code* columns by default. The number and names of GL account columns may vary depending on how the GL accounts are defined in *Administration>License Information>Settings*. In addition, the *Id* column can be shown. Each of these columns may be shown, hidden, sorted, or filtered.

See the [AmpliFund User Interface Navigation Guide](#) to learn more about sorting and filtering list views.

How To Customize GL Accounts

GL accounts can be defined in *Administration>License Information>Settings*. By defining a GL account, you can rename each code type to an easily recognizable name for your organization. If no names are provided, the default names are “GL Code,” “Classification 1,” and “Classification 2.”

1. Open **Administration>License Information**.
2. Open the **Settings** tab.
3. Click the  (**Edit icon**) in the *Icon Bar*.
4. In the *GL Account Definition* section, select **Yes** in each Account Code’s dropdown to activate the code type. You can use up to 6 code types.
5. In the fields below the dropdowns, add the new **code type name** (i.e. “Organization Code”).



6. Click **Update**.

How To Add a GL Account

GL accounts can be added manually or by importing. We recommend that GL accounts are imported to avoid entry errors.

1. Open **Administration>Lists>GL Accounts**.
2. Click the **+** (**Create icon**) in the *Icon Bar*.
3. Add the **GL Name**. This is how you will identify the line item, such as “Supplies” or “Travel.”
4. Add the **GL Code**. This is the unique identifier for the account. It may be an alphanumeric entry.
5. Add additional **GL code types** (optional). The number and name of these types may vary depending on what has been defined in *Administration>License Information>Settings*.
6. Add the **Description** (optional).
7. Click **Create**.

How To Edit a GL Account

We recommend that you only edit GL accounts that are not in use.

1. Open **Administration>Lists>GL Accounts**.
2. Click the  (**Edit icon**) next to a GL name.

GL Name	Description
ADV - BILLBOARDS	  

3. Update the information as necessary.
4. Click **Save**.

How To Delete a GL Account

Prerequisite: GL accounts cannot be in use.

1. Open **Administration>Lists>GL Accounts**.
2. Click the  (**Delete icon**) next to a GL name.

GL Name	Description
ADV - BILLBOARDS	  

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

How To Import GL Accounts

Organizational Admin can import multiple GL accounts using the

 **Note**

If you have customized your GL Accounts, the column headers and number of columns must match what you have defined.

[GL Accounts Import Template](#) (recommended) or their own Excel file. The GL Accounts Import Template includes the *GL Name**, *Description*, *GL Code**, and account code fields. Required fields have asterisks (*) next to their names.

1. Open **Administration>Lists>Subjects**.
2. Click the  (**Import icon**) in the *Icon Bar*.
3. Click **Select Files...** to select a file from your computer.
4. Click **Next**.
5. Select the **Destination** field for each *Source* column. If you are using the [GL Accounts Import Template](#) (recommended), the source and destination fields should match.
6. Click **Create**.

How To View GL Account Connections

The *Connections tab* shows all grants linked to the GL account.

1. Open **Administration>Lists>GL Accounts**.
2. Click a **GL name**.
3. Open the **Connections tab**.

Icons

-  Print
-  Help
-  Save Current View
-  Create
-  Edit
-  Purge

Note Types

The Note Types list contains all types of notes users can select when creating a note on a record. The default note types are Call, Email, Meeting, and Onsite Visit. The default note types cannot be edited or deleted from the list. Additional note types can be added or edited as needed.

The Note Types list shows the *Name* column by default. There are no other columns available.

How To Add a Note Type

1. Open **Administration>Lists>Note Types**.
2. Click the **+** (**Create icon**) in the *Icon Bar*.
3. Add a **Name**.
4. Click **Create**.

How To Edit a Note Type

Prerequisite: Cannot be one of the default note types: Call, Email, Meeting, or Onsite Visit.

1. Open **Administration>Lists>Note Types**.
2. Click on a **note type name**.
3. Click the  (**Edit icon**) in the *Icon Bar*.
4. Update the information as necessary.
5. Click **Update**.

Note

Purged records cannot be restored or recovered.

How to Purge a Note Type

Prerequisite: Cannot be assigned to a note; cannot be one of the default note types.

Note types can be purged to permanently remove them from AmpliFund.

1. Open **Administration>Lists>Note Types**.
2. Click on a **note type name**.
3. Click the  (**Purge icon**) in the *Icon Bar*.
4. In the confirmation pop-up window, click **Purge**.

Actuals

The Actuals section of the *Administration* module allows Organizational Admin to add and manage expenses. Clients with *Time & Effort Certification* can also add and manage personnel expense records (HR Actuals).

Icons

-  Print
-  Help
-  Import
-  Delete

Expenses

The Expenses list allows Organizational Admin to import, review, and apply personnel and non-personnel expense records. Expenses can be previewed and edited prior to being imported. Once imported, expenses will be visible to users with access to associated line items, grants, or budget reports.

The Expenses list shows the *File Upload Date*, *Import Status*, *Date Expenses Imported*, *Import Name*, *Imported By*, *Records Uploaded*, *Records Imported*, and *Records Not Imported* columns by default. Each of these columns may be shown, hidden, sorted, or filtered.

See the [AmpliFund User Interface Navigation Guide](#) to learn more about sorting and filtering list views.

How To View an Expense Import

An expense import record includes the status, name, date and time of import, user who imported, imported file, and the expense records.

1. Open **Administration>Actuals>Expenses**.
2. Click a **file upload date**.

How To Delete an Expense Import

Prerequisite: Must be in Preview status; expenses cannot be imported.

1. Open **Administration>Actuals>Expenses**.
2. Click the  (**Delete icon**) next to a file upload date.



How To Import Expenses

Note

If you have customized your GL Accounts, the column headers and number of columns must match what you have defined.

Organizational Admin can import multiple expenses using the [Expenses Import Template](#) (recommended) or their own Excel file. The Expenses Import Template includes the *GL Name**, *Description*, *Grant Financial Code*, *Expense Date**, *GL Code**, *Amount**, and account code fields. Required fields have asterisks (*) next to their names. The GL names and GL codes in the import template must exactly match the GL names and GL codes in *Administration>Lists>GL Accounts* for the data to import correctly.

1. Open **Administration>Actuals>Expenses**.
2. Click the  (**Import icon**) in the *Icon Bar*.
3. In the pop-up window, add an **Import Name**. The name must not match any other import names.

Import Name

4. Click **Choose a file** to select a file from your computer.
5. Click **Create New** to create default mapping or select an existing **default map** (optional). A default map can be useful if you use the same file template for importing expenses.
6. Select the **Destination** field for each *Source* column. If you are using the [Expenses Import Template](#) (recommended), the source and destination fields should match.
7. Click **Preview**.
8. On the Preview page, update the information as necessary. You will see all actuals by default; use the tabs at the top of the page to filter.

All (39)
Needs Attention (36)
Errors (3)
Ready For Import
Deleted

9. Click **Import to Expenses**.

How To Split an Expense

Prerequisites: Import must have a *Preview* status; expense must have a *Needs Attention* import status.

An expense can be split across several grants, budget line items, or benefits if necessary.

1. Open **Administration>Actuals>Expenses**.
2. Click a **file upload date** with a *Preview* status.
3. Open the **Needs Attention tab** to show expenses that need routing.
4. Select **Split** from the grant name, line item, or benefit dropdown.

Grant Name	Line Item	Benefit
Improving East 9th Street ▾	Steamroller 6250AB ▾	
Improving East 9th Street ▾	Steamroller 6250AB ▾	
Split ▾		

5. Select the associated **grants, line items, or benefits** to split the expense across.
6. In the *Amount* column, add each **amount**.
7. Click **Update**.

How To Delete an Expense

An expense can be deleted from the import preview if necessary. Deleted expenses will appear under the Deleted tab and will not be imported.

1. Open **Administration>Actuals>Expenses**.
2. Click a **file upload date** with a *Preview* status.
3. Check the **Select checkbox** next to an expense.

<input type="checkbox"/>	Error - GL Code not found in the system
--------------------------	---

4. Click the  (**Delete icon**) under *Actions*.

Select All	Actions
<input type="checkbox"/>	

How To Restore a Deleted Expense

Deleted expenses will appear under the *Deleted tab* and will not be imported. Once restored, the deleted expense will be available under its original tab.

1. Open **Administration>Actuals>Expenses**.
2. Click a **file upload date** with a *Preview* status.
3. Open the **Deleted tab**.
4. Check the **Select checkbox** next to an expense.

<input type="checkbox"/>	Error - GL Code not found in the system
--------------------------	---

5. Click the  (Delete icon) under *Actions*.



Icons

-  Print
-  Help
-  Save Current View
-  Import
-  Export
-  Apply Actuals

HR Actuals (Personnel)

For clients with the Time & Effort Certification module

The HR Actuals list allows Organizational Admin to import, view, and apply personnel expenses and staff hours and salaries. Once applied, HR actuals will be visible to users with access to associated line items, grants, or budget reports.

The HR Actuals list shows the *Time Period* column by default. In addition, the *Applied*, *Applied By*, and *Applied Date* columns can be shown. Each of these columns may be shown, hidden, sorted, or filtered.

See the [AmpliFund User Interface Navigation Guide](#) to learn more about sorting and filtering list views.

How To View an HR Actuals Import

An expense import record includes the staff names, user identifier, actual hours, actual salary, expense date, and applied information for the time period.

1. Open **Administration > Actuals > HR Actuals (Personnel)**.
2. Click an **HR actual time period**.

How To Import HR Actuals

Warning

If the staff First Name, Last Name, and Unique Identifier do not **exactly match** the information in *Contacts > Staff*, the data will not import correctly.

Organizational Admin can import multiple HR actuals using the [HR Actuals Import Template](#) (recommended) or their own Excel file. The HR Actuals Import Template includes the *First Name**, *Last Name**, *Actual Hours*, *Actual Salary**, and *Unique Identifier** fields. Required fields have asterisks (*) next to their names.

1. Open **Administration > Actuals > HR Actuals (Personnel)**.
2. Click the  (**Import icon**) in the *Icon Bar*.
3. In the pop-up window, select the expenses' **month and year**. This will not override the dates in the HR Actuals Import Template.
4. Click **Select Files...** to select a file from your computer.
5. Click **Next**.
6. Select the **Destination** field for each *Source* column. If you are using the [HR Actuals Import Template](#) (recommended), the source and destination fields should match.
7. Click **Create**.

How To Apply HR Actuals

Imported HR actuals can be reviewed by Organizational Admin in the *Administration* module before being applied. Applied actuals are visible throughout AmpliFund.

1. Open **Administration>Actuals>HR Actuals (Personnel)**.
2. Click on a time period.
3. Click the  (**Apply icon**) in the *Icon Bar*.
4. In the pop-up window, select how to handle existing expenses:
 - a. If you would like to replace all existing expenses with the new expenses, select **Delete any existing expenses and add the new expenses**.
 - b. If you would like to add new expenses to existing expenses, select **Do not delete any expenses. Only add the new expenses**.

Note

If you select **Delete any existing expenses and add the new expenses**, any expense in the time period will be removed if grant's tracking or reporting period is open. This is recommended if expense entries are cumulative during the period.

Custom

For clients with Advanced Data Collection

The Custom section of the *Administration* module allows Organizational Admin to add and manage custom forms and form extensions to collect specific additional data points in AmpliFund. Custom forms can be added, imported, and exported and will be available under the record's *Custom tab*. Custom form extensions are additional sections that can be added to the detail page of a primary object (i.e. grant, opportunity, project, or fund) or to the information of a secondary object (i.e. task, note, or expense).

Icons

-  Print
-  Help
-  Add
-  Edit
-  Copy
-  Delete
-  Add
-  Move Up
-  Move Down

Form Extension Library

The Form Extension Library list allows Organizational Admin to edit, copy, and delete form extensions directly to objects in AmpliFund. Form extensions are additional sections that can be added to the detail page of a primary object (i.e. grant, opportunity, project, or fund) or to the information of a secondary object (i.e. task, note, or expense). Once published, form extensions will be available on the primary object's *Custom tab*. For more information on custom form extensions, see the [Advanced Data Collection Guide](#).

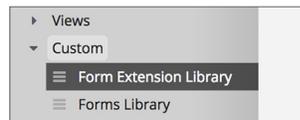
The Form Extension Library list shows the *Display Name, Object, Global, Recipient, Published, and Description* columns by default. Each of these columns may be shown, hidden, sorted, or filtered.

See the [AmpliFund User Interface Navigation Guide](#) to learn more about sorting and filtering list views.

How To Add a Form Extension

Organizational Admin can create and manage form extensions for multiple objects in AmpliFund on the Form Extension Library list.

1. Open **Administration > Custom > Form Extension Library**.



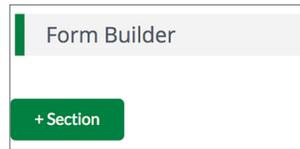
2. Click the **+** (Add icon) in the *Icon Bar*.

Form Details

3. Add a **Form Name**. This is the name that will appear in the record's *Custom tab*.
4. Select **AmpliFund Object(s)** where the form will be available.
5. Check the **Enable Form on All Records for Object(s)** checkbox to add the form to all selected object records. If checked, the form cannot be hidden from a record.
6. For clients with *Recipient Access Licenses*, check the **Enable Form for Recipients Only** checkbox to make the form available to recipient organization users only.
7. Add a **Description** (optional).

Form Builder

8. Click **+ Section** to add a section.



9. Add a **Section Name**.

10. Click **+ Field** to add a custom field.

11. Add a **Field Name**.

12. Select **Field Type**. Field types are divided into Content and Entry fields. Content fields provide information to the user. Entry fields request information from the user.

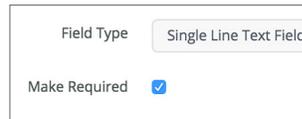
- **Text Label:** Users will see the field name
- **Description Text:** Users will see the field name and a long description
- **External Link:** Users will see a URL link
- **Attachment:** Users will see a link to download a file
- **Single Line Text Field:** Users will be prompted to enter information in a single line text box
- **Multi Line Text Box:** Users will be prompted to enter information in a large text box
- **Multiple Choice:** Users will be prompted to select one option from options provided. To create options, add **option** in field and click the **+** (Add icon).
- **Multiple Selection - Checkboxes:** Users will be prompted to select multiple options from options provided. To create options, add **option** in field and click the **+** (Add icon).
- **Dropdown List:** Users will be prompted to select one option from options provided. To create options, add **option** in field and click the **+** (Add icon).
- **File Upload:** Users are prompted to select and attach a file from their computer
- **Date:** Users are prompted to add or select a date
- **Numeric Field:** Users are prompted to add a number (no other characters are allowed). Users can be restricted to decimal, whole, currency, or percent numeric entries.

Note

Only one file can be uploaded per *File Upload* field.

a. For entry type fields, check the **Make Required checkbox** to require

users to add information to the field.



A screenshot of a configuration box for a field. It has two sections: 'Field Type' with a dropdown menu set to 'Single Line Text Field', and 'Make Required' with a checked checkbox.

13. Check the **Help Text** checkbox to add help text to your field. If help text is added, a **i** (Help icon) will appear next to the field name.
 - a. Add **Help Text Description**. The help text will appear when users hover over the **i** (Help icon) next to a field name.



A screenshot of a form with two input fields. The top field is labeled 'Numeric Field' and has a tooltip that says 'This text helps explain the field.' The bottom field is labeled 'Field With Help Text' and has a small 'i' icon next to it.

14. Click **Save**.

How To Edit a Form Extension

All sections and fields can be edited before data has been added. Once data has been added, only the **Make Required**, **Add to Grid**, **Link**, and **Add Help Text** options can be edited.

1. Open **Administration>Custom>Form Extension Library**.
2. Click the **✎** (**Edit icon**) next to a form extension name.
3. Update the information as necessary.
4. Click **Save**.

How To Copy a Form Extension

1. Open **Administration>Custom>Form Extension Library**.
2. Click the **📄** (**Copy icon**) next to a form extension name.
3. Update the information as necessary.
4. Click **Save**.

Warning

Deleting a form extension will also permanently any data entered on the form extension across all associated objects.

How To Delete a Form Extension

1. Open **Administration>Custom>Form Extension Library**.
2. Click the **🗑** (**Delete icon**) next to a form name.
3. In the confirmation pop-up window, click **Delete**.

How to Publish a Form Extension

Form extensions must be published to be available on AmpliFund objects.
Only published form extensions can be added to objects.

1. Open **Administration>Custom>Form Extension Library**.
2. Click a **form extension name**.
3. Click **Publish**.

How to Unpublish a Form Extension

Unpublished form extensions will be removed from all associated AmpliFund objects.

1. Open **Administration>Custom>Form Extension Library**.
2. Click a **form extension name**.
3. Click **Unpublish**.

Icons

-  Print
-  Help
-  Add
-  Edit
-  Copy
-  Delete
-  Add
-  Move Up
-  Move Down

Forms Library

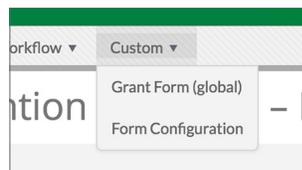
The Forms Library list allows Organizational Admin to create and manage forms for multiple object types in AmpliFund. Once published, custom forms will be available under the record's *Custom tab*. For more information on custom form extensions, see the [Advanced Data Collection Guide](#).

The Forms Library list shows the *Display Name*, *Object*, *Global*, *Recipient*, *Published*, and *Description* columns by default. Each of these columns may be shown, hidden, sorted, or filtered.

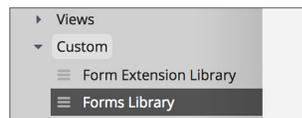
See the [AmpliFund User Interface Navigation Guide](#) to learn more about sorting and filtering list views.

How To Add a Form

Organizational Admin can create and manage forms for multiple objects in AmpliFund on the Forms Library list.



1. Open **Administration > Custom > Forms Library**.



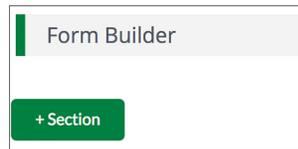
2. Click the **+** (Add icon) in the *Icon Bar*.

Form Details

3. Add a **Form Name**. This is the name that will appear in the record's *Custom tab*.
4. Select **AmpliFund Object(s)** where the form will be available.
5. Check the **Enable Form on All Records for Object(s)** checkbox to add the form to all selected object records. If checked, the form cannot be hidden from a record.
6. For clients with *Recipient Access Licenses*, check the **Enable Form for Recipients Only** checkbox to make the form available to recipient organization users only.
7. Add a **Description** (optional).

Form Builder

8. Click **+ Section** to add a section.



9. Add a **Section Name**.

10. Click **+ Field** to add a custom field.

11. Add a **Field Name**.

12. Select **Field Type**. Field types are divided into Content and Entry fields. Content fields provide information to the user. Entry fields request information from the user. For more information on each field type, see [Form Builder Features](#).

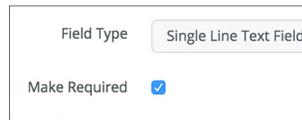
- **Text Label:** Users will see the field name
- **Description Text:** Users will see the field name and a long description
- **External Link:** Users will see a URL link
- **Attachment:** Users will see a link to download a file
- **Single Line Text Field:** Users will be prompted to enter information in a single line text box
- **Multi Line Text Box:** Users will be prompted to enter information in a large text box
- **Multiple Choice:** Users will be prompted to select one option from options provided. To create options, add **option** in field and click the **+** (Add icon).
- **Multiple Selection - Checkboxes:** Users will be prompted to select multiple options from options provided. To create options, add **option** in field and click the **+** (Add icon).
- **Dropdown List:** Users will be prompted to select one option from options provided. To create options, add **option** in field and click the **+** (Add icon).
- **File Upload:** Users are prompted to select and attach a file from their computer
- **Date:** Users are prompted to add or select a date
- **Numeric Field:** Users are prompted to add a number (no other characters are allowed). Users can be restricted to decimal, whole,

Note

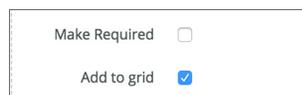
Only one file can be uploaded per *File Upload* field.

currency, or percent numeric entries.

- a. For entry type fields, check the **Make Required checkbox** to require users to add information to the field.



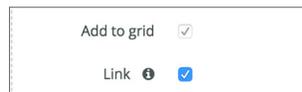
- b. For entry type fields, check the **Add to Grid checkbox** to add users' field responses to the form list page. The form list page can be viewed from the record's *Custom tab > form display name*.



Note

Field must be required and added to grid to become the form link. Each form must have a form link.

- c. For required grid fields, check the **Link checkbox** to have the field response appear as a link on the form list page. This link allows users to view the completed form. Only one field can be selected as a link.



13. Check the **Add Help Text checkbox** to add help text to your field. If help text is added, a  (Help icon) will appear next to the field name.

- a. Add **Help Text Description**. The help text will appear when users hover over the  (Help icon) next to a field name.



14. Click **Save**.

How To Edit a Form

All sections and fields can be edited before data has been added. Once data has been added, only the **Make Required**, **Add to Grid**, **Link**, and **Add Help Text** options can be edited.

1. Open **Administration > Custom > Forms Library**.
2. Click the  (**Edit icon**) next to a form name.
3. Update the information as necessary.

4. Click **Save**.

How To Copy a Form

1. Open **Administration>Custom>Forms Library**.
2. Click the  (**Copy icon**) next to a form name.
3. Update the information as necessary.
4. Click **Save**.

Warning

Deleting a form will also permanently any data entered on the form across all associated objects.

How To Delete a Form

1. Open **Administration>Custom>Forms Library**.
2. Click the  (**Delete icon**) next to a form name.
3. In the confirmation pop-up window, click **Delete**.

How to Publish a Form

Forms must be published to be available on AmpliFund objects. Only published forms can be added to objects.

1. Open **Administration>Custom>Forms Library**.
2. Click a **form name**.
3. Click **Publish**.

How to Unpublish a Form

Unpublished forms will be removed from all associated AmpliFund objects.

1. Open **Administration>Custom>Forms Library**.
2. Click a **form name**.
3. Click **Unpublish**.

Appendix

Security Roles

Add-on modules are indicated with an asterisk (*). For more information on each security role's access, see the [AmpliFund Security Role Matrix Guide](#).

Organizational Admin	Organizational Admin have the highest level of security and can create, view, and edit all records in the account, including Staff compensation information. Organizational Admin are the only users that can create, view, and edit records in the <i>Administration</i> module. The <i>Administration</i> module includes License Information, Account Settings, Lead and Sub-Recipients* management, Workflow* management, System Security and user management, and Lists and Actuals management and import. There is no limit to the number of Organizational Admin you can have per account.
Executives	Executives can view all records in the account, including Staff compensation information, but cannot add or edit any records. Executive users can also view the License Information section in the <i>Administration</i> module.
Department Admin	Department Admin can create, view, and edit all grant and project* records linked to their department(s).
Department Users	Department Users can add achievements and expenses that are assigned to them. In addition, they can view all grant and project* records linked to their department(s). Department Users are classified as Salary or No Salary. Department Users (No Salary) cannot create, view, or edit personnel line items on a grant's budget.
Project Admin	Project Admin can create, view, and edit all project* records. In addition, Project Administrators can view all grants related to their projects.
Project Users	Project Users can add achievements and expenses assigned to them and can view and edit all projects* assigned to them. They can also view any grants linked to their projects. Project Users can create new projects. Project Users are classified as Salary or No Salary. Project Users (No Salary) cannot create, view, or edit personnel line items on a grant's budget.
Fund Admin	Fund Admin can create, view, and edit all fund*, opportunity*, and award* records.
Fund Users	Fund Users can view and edit any assigned fund* records. Fund Users can create new fund records. They can also create, view, and edit all opportunity* and award* records. Fund Users are classified as Salary or No Salary. If assigned to a grant, Fund Users (No Salary) cannot create, view, or edit personnel line items on a grant's budget.

Researcher Researchers only have access to the *Research** module. Researchers cannot apply for or manage grants.

Implicit Security Roles

If users are designated as a record's manager (i.e. Grant Managers, Project Managers, or Fund Managers), they will have additional security privileges on those records. They will be able to view all calendar items related to the record, and view and edit the record. (No Salary) users will still not be able to see the personnel line items.