



**Activity Management**

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## ***Activity Overview***

The *Activity* module is available to all AmpliFund users and shows user-specific information, such as tasks assigned to the user. The module contains the user's Calendar and Message Center. It also contains their Events, Tasks, Workflow (for users with the *Workflow* module), Achievements, Expenses, Program Income, Timesheets and Timesheet Approvals (for users with the *Time & Effort* module), Payment Request Approvals (for users with Sub-Recipient Licenses), Tracking Periods, and Reporting Periods (for users with Sub-Recipient Licenses) lists.

### Icons

-  Print
-  Help
-  Subscribe to Calendar

# Calendar

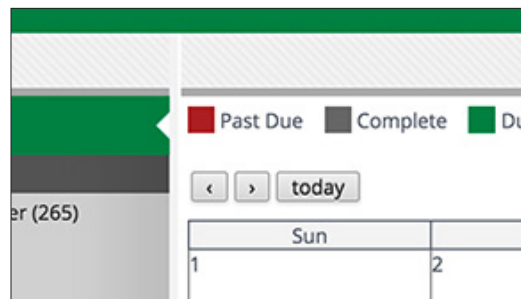
The AmpliFund calendar displays as every user's homepage. Each user can view items assigned to them on the calendar. Organizational Administrators can see every task and event throughout AmpliFund on their calendar.

Tasks on the calendar are color-coded based on their status: Past Due items are red, Completed items are gray, and Due items are blue. Events are blue.

The calendar defaults to the current month. Using the buttons above the calendar, you may change the month or the time increment displayed.

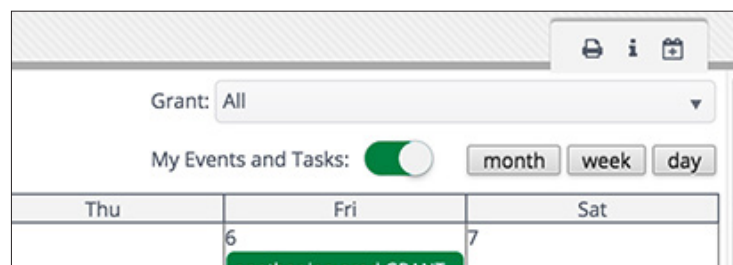
## How To Change the Month

1. Click the **left arrow button** in the top-left of the calendar to move to the previous month.
2. Click the **right arrow button** in the top-left of the calendar to move to the next upcoming month.



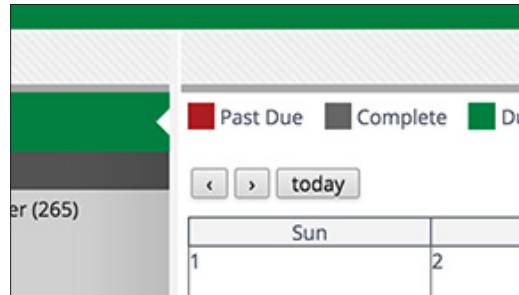
## How To Change the Time Period

1. Click the **Month button** in the top-right of the calendar to show a monthly view.
2. Click the **Week button** in the top-right of the calendar to show a weekly view.
3. Click the **Day button** in the top-right of the calendar to show a daily view.

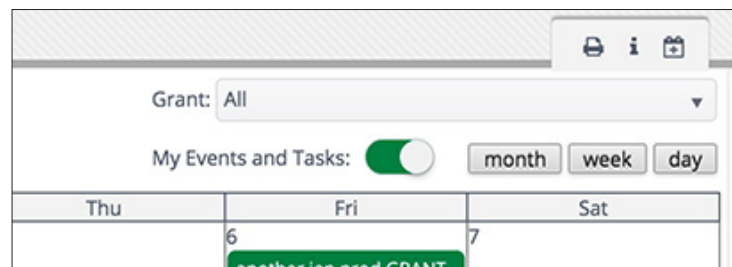


## How To Return the Calendar to the Current Date

1. Click the **Today** button in the top-left of the calendar.



## How To View My Events and Tasks *Organizational Administrators and Executives Only*



The *My Events and Tasks* switch allows Organizational Administrators and Executives to change the view of their calendar. When toggled on, the calendar will only display events, tasks, and notifications that are assigned or related directly to their account. When toggled off, the calendar will display all events, tasks, and notifications across the entire AmpliFund account.

### Note

If the grant selected does not have any dates during the viewed month, the calendar will appear blank.

## How To Filter by Grant

By default, the calendar displays all grant dates that you have access to. The *Grant* dropdown menu allows you to see the tasks and events associated with a single grant on the calendar.

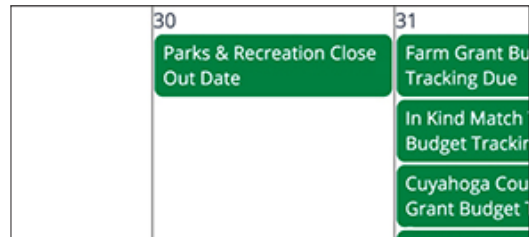
1. In the *Grant* dropdown menu in the top-right of the calendar, select a **grant**.



## How To View Calendar Item Details

Tasks and events may have additional details that do not appear on the calendar view. Additional information for tasks includes name, description, status, responsible delegation, additional recipients, due date, and task reminders. Additional information for events includes name, organizer, start date, end date, and description. For additional details on how to manage tasks, see [Tasks](#). For additional details on how to manage Events, see [Events](#).

1. Click on a **task** or **event**.



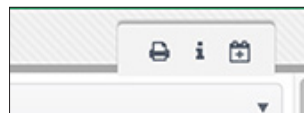
### Note

Gmail users may need to subscribe via URL. Follow the instructions in the Calendar Subscription pop-up window.

## How To Subscribe to the Calendar




Each AmpliFund user can subscribe to their AmpliFund calendar so that it syncs with their personal calendar application.

1. Click the  (**Calendar Subscription icon**) in the *Icon Bar*.



2. In the pop-up window, click the **Click to Sync Your Calendar** link.

### Icons

-  Print
-  Help
-  Delete

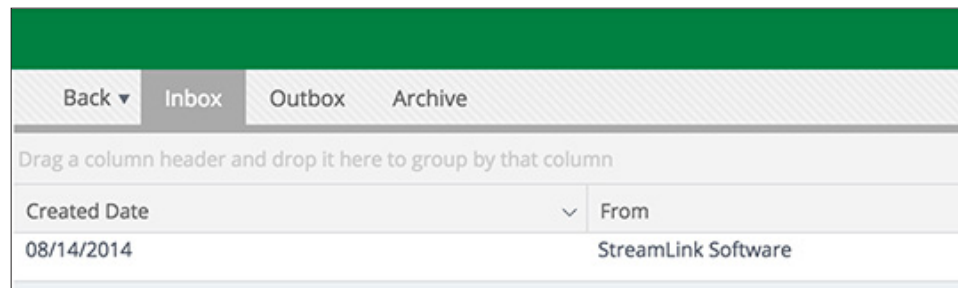
# Message Center

The AmpliFund Message Center provides access to messages sent through AmpliFund. The Message Center is accessible through the *Activity* module and *User Navigation Menu*.

The Message Center shows the *Created Date*, *From*, and *Subject* 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 modifying AmpliFund page views.

The Message Center does not allow you to send messages. Any messages in the Message Center will have also been sent to your email inbox. You can send emails from the Email Manager in AmpliFund (*object>Tools tab>Email Manager*). Messages sent from the Email Manager will appear in the recipient's Email Manager list, as well as the sender's Message Center Outbox.


## How To View Messages in Your Inbox



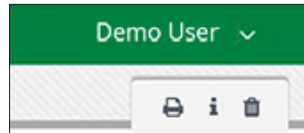
The Message Inbox displays messages sent to you from another user. All messages in the Message Center will also be emailed; the Message Center records AmpliFund messages.

1. Open **Activity>Message Center**.
2. Open the **Inbox** tab.
3. Click a **message subject**.

## How To Archive a Message

1. Open **Activity>Message Center**.
2. Open the **Inbox** tab.
3. Click a **message subject**.
4. Click the  (**Delete icon**) in the *Icon Bar*.

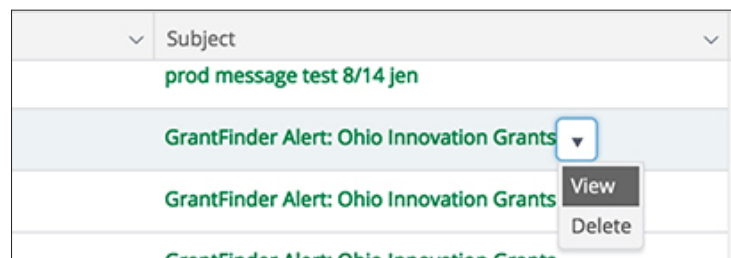




5. In the confirmation pop-up window, click **Delete**.

-- OR --

1. Open **Activity>Message Center**.
2. Open the **Inbox** tab.
3. Hover over a **message subject** to show the dropdown menu arrow.
4. Click the **dropdown arrow**.
5. Select **Delete**.



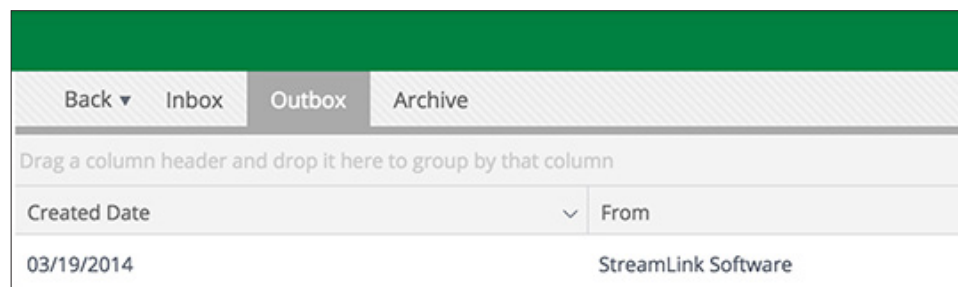
6. In the confirmation pop-up window, click **Delete**.

## Grant Research Messages

*For clients with Grant Research*

In addition to user-created messages, Grant Research users will see Grant Research alerts in their Message Center. After you have created a saved search in *Grant Management>Research*, automated notifications will be sent to your AmpliFund Message Center and email inbox whenever there's new award that fits your saved search criteria.

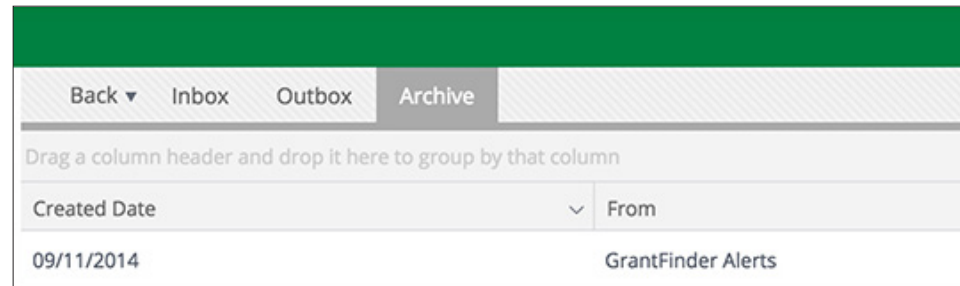
## How To View a Message in Your Outbox



The Message Outbox displays messages that you have sent in AmpliFund. Messages cannot be deleted from the Message Outbox.

1. Open **Activity>Message Center**.
2. Open the **Outbox tab**.
3. Click a **message subject**.

## How To View a Message in Your Archive



Back ▾	Inbox	Outbox	Archive	
Drag a column header and drop it here to group by that column				
Created Date				From
09/11/2014				GrantFinder Alerts

The Message Archive displays messages that have been deleted from your Message Inbox. Messages cannot be deleted from the Message Archive.

1. Open **Activity>Message Center**.
2. Open the **Archive tab**.
3. Click a **message subject**.

Icons



Print

# Events

Events are important dates in a grant's lifecycle, such as the Letter of Intent Due Date, Proposal Open Date, Proposal Close Date, Projected Receipt Date, and Close Out Date. Events appear on a Grant Manager's calendar for their grant(s); Organizational Administrators can view all events in AmpliFund. Events do not require any action to be taken; they simply serve as reminders. Email reminders are not sent out for events.




Events may be accessed through the AmpliFund Calendar, or through the Events page.

The Events list shows the *Grant*, *Event*, *Grant Manager*, *Grant Writers*, and *Date* 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 modifying AmpliFund page views.

## How To View an Event

1. Open **Activity>Calendar**.
  2. Click on an **event name**.
- OR --
1. Open **Activity>Events**.

### Icons

-  Print
-  Help
-  Mark as Complete

# Tasks

Tasks track the completion of responsibilities that are not programmatic achievements, expenses, or workflow responsibilities. Tasks can be system-generated or user-created.

The Tasks list shows all of your assigned tasks. Organizational Administrators may view all tasks in AmpliFund. Tasks can be accessed from *Activity>Tasks* or *Activity>Calendar*.

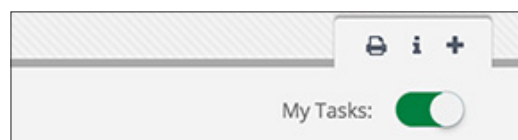
Tasks must be created from another object in AmpliFund, such as Organizations, Individuals, Staff, Grants, Projects, and Funds. You can assign tasks to other users or to yourself. Only users with the task creator or admin users can edit the task information.

For more information about tracking and reporting periods, see [Tracking Periods](#) and [Reporting Periods](#).

The Tasks list shows the *Name*, *Responsible Delegation*, *Due Date*, and *Task Status* columns by default. In addition, the following columns are available: *Additional Individual(s)*, *Created By*, *Created Date*, *Modified By*, and *Modified Date*. Each of these columns may be shown, hidden, sorted, or filtered. See the [AmpliFund User Interface Navigation Guide](#) to learn more about modifying AmpliFund page views.

## How To View My Tasks

*Organizational Administrators and Executives Only*



The *My Tasks* switch allows Organizational Administrators and Executives to change the view of their Tasks list. When toggled on, the list will only display their assigned tasks. When toggled off, the list will display all tasks across the entire AmpliFund account.

## How To View a Task

1. Open **Activity>Calendar**.
2. Click on a **task name**.


-- OR --




1. Open **Activity>Tasks**.

2. Click on a **task name**.

## How To Edit a Task


Prerequisite: Must be task creator or admin user.

1. Open **Activity>Tasks**.
2. Click the  (**Edit icon**) next to a task name.

Name	Responsible Delegation
Budget Tracking Due - Parks & Recreation   	StreamLink Software

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



-- OR --

1. Open **Activity>Tasks**.
2. Click on a **task name**.
3. Click the  (**Edit icon**) in the *Icon Bar*.
4. Update the information as necessary.
5. Click **Save**.

## How To Mark a Task as Complete

Once a task has been assigned, the assignee(s) will receive up to three email reminders based on the task settings. Once a task is completed, no further email reminders will be sent. If a task is not completed by its due date, daily email reminders will be sent to the assignee until the task is completed.

1. Open **Activity>Tasks**.
2. Click the  (**Mark as Complete icon**) next to a task name.

Name	Responsible Delegation
Budget Tracking Due - Parks & Recreation   <input checked="" type="checkbox"/>	StreamLink Software

3. In the confirmation pop-up window, click **Mark as Complete**.

-- OR --

1. Open **Activity>Tasks**.
2. Click a **task name**.
3. Click the  (**Mark as Complete icon**) in the *Icon Bar*.

4. In the confirmation pop-up window, click **Mark as Complete**.
- OR --
1. Open **Activity>Calendar**.
2. Click on a **task**.
3. In the pop-up window, click **Mark as Completed**.

## Icons



Print



Help

Save Current  
View

# Workflow

*For clients with the Workflow module and/or the Competitive Award Management module*

The Workflow list shows any workflow items requiring action. The Workflow list shows the action *Name*, *Current Queue*, and *Type* columns by default. There are no additional columns.

Items that are ready for your action will appear on your list. You will also receive an email notification when you have workflow actions to complete. Once the object moves out of the workflow queue containing your action, the item will no longer appear on your list.

## How To View a Workflow Action

1. Open **Activity>Workflow**.
2. Click on a **workflow action name**.

### Icons

- Print
- Help
- Save Current View
- Achievements
- Create or Add Achievement
- Edit
- Delete

# Achievements

Achievements are progress accomplished against planned grant programmatic goals. The Achievements list displays all your available programmatic goals. Organizational Administrators can see all goals in AmpliFund.

The Achievements list shows the *Activity Name*, *Grant Name*, *Goal Type*, *Responsible Delegation*, *Delegation*, *Start Date*, and *End Date* columns by default. In addition, the following columns are available: *Strategy*, *Additional Staff*, *Project*, *Project Goal*, *Created By*, *Created Date*, *Modified By*, *Modified Date*, *Status*, and *User Identifier*. Each of these columns may be shown, hidden, sorted, or filtered. See the [AmpliFund User Interface Navigation Guide](#) to learn more about modifying AmpliFund page views.

## How To View a Performance Goal

Performance goals are the planned programmatic goals related to a grant. Responsible Individuals may view each goal’s details through the Achievements list or through each grant record.

1. Open **Activity>Achievements**.
2. Click on an **activity name**.

## How To View an Achievement

1. Open **Activity>Achievements**.
2. Click on the (**View Achievements icon**) next to an activity name.

Activity Name	Grant Name	Goal Type
Research topics for future seminars	Health Promotion and Disease Prevention Research	Narrative

3. Click an **achievement date**.

### Note

Depending on your account settings, this record type may have additional custom fields or sections.


## How To Add an Achievement

As a user makes progress against a goal, that goal’s partial or whole completion may be marked at any time by adding an achievement. Achievements may be added through the *Activity* or *Grant Management* module.

1. Open **Activity>Achievements**.




- Click the  (**View Achievements icon**) next to an activity name.

Activity Name	Grant Name	Goal Type
Research topics for future seminars  +	Health Promotion and Disease Prevention Research	Narrative

- Click the **+** (**Create icon**) in the *Icon Bar*.
- In the pop-up window, select an **Achievement Date**.
- Add an **achievement**. Depending on the goal type, the achievement might be a number, percentage, or completion.
- Add **Notes** and **Attachments** (optional).
- Click **Create**.

-- OR --

- Open **Activity>Achievements**.
- Click the **+** (**Add Achievements icon**) next to an activity name.

Activity Name	Grant Name	Goal Type
Research topics for future seminars  +	Health Promotion and Disease Prevention Research	Narrative



- In the pop-up window, select an **Achievement Date**.
- Add an **achievement**. Depending on the goal type, the achievement might be a number, percentage, or completion.
- Add **Notes** and **Attachments** (optional).
- Click **Create**.

### Note

Responsible Individuals may edit or delete their achievements.

## How To Edit an Achievement

You can edit your achievements from the Achievements list page. You will not be able to edit your achievements once the Grant Manager closes the Performance Tracking Interval for the associated goal.

- Open **Activity>Achievements**.
- Click on the  (**View Achievements icon**) next to an activity name.
- Click the  (**Edit icon**) next to an achievement date.

Achievement Date	Narrative
01/01/2015  	Yes



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

 **Note**

Responsible Individuals may edit or delete their achievements.

## How To Delete an Achievement







You can delete achievements if the goal's performance Tracking Interval is open. Once deleted, the achievement will no longer be visible on the Achievements list or performance reports.

1. Open **Activity>Achievements**.
2. Click on the  (**View Achievements icon**) next to an activity name.
3. Click the  (**Delete icon**) next to an achievement date.

Achievement Date	Narrative
01/01/2015	  Yes

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

### Icons

-  Print
-  Help
-  Add Expense
-  Edit
-  Mark as Reviewed
-  Delete

# Expenses

Expenses track dollars spent against a planned grant budget line item. Expenses can be added towards defined grant budget line items.

Users can see only the budget line items they are responsible for in the Expenses list; Organizational Administrators can see all budget line items in AmpliFund. Responsible Individuals can also view the budgeted and remaining amounts for any of their line items.

The Expense list can be filtered by Time Frame, Grant, Category, and Line Item. The following columns can be shown or hidden: *Grant Start Date, Grant End Date, GL Account, Line Item, Total Budgeted, Total Remaining, Responsible Individual, Created By, Payee, Cash Match, In Kind, Grant Name, Budget Category, and Record ID.*

## Expense Entry Methods - Manual vs. Import

When a grant is created, the GL Actual Entry Method can be set to **Import Only** or **Manual or Import** in the grant details. If it is set to **Import Only**, users will have view-only access to their line items and imported expenses. If it is set to **Manual or Import**, users can add and edit expenses in AmpliFund.

### Note

The *Line Item* column must be shown to view the line item. This option is available in the *Expense View Settings* section.

## How To View a Line Item

Budget line items are the planned expenses related to a grant. Responsible Individuals may view each line item's details through the Expenses list or through the grant budget.

1. Open **Activity>Expenses**.
2. In the *Expenses View Settings* section, select a **Time Frame** to view.
3. Select a **Grant, Category, and/or Line Item** to view (optional).
4. Click **Run**.
5. In the *Expenses* section, click a **line item name**.

## How To View an Expense

1. Open **Activity>Expenses**.
2. In the *Expenses View Settings* section, select a **Time Frame** to view.
3. Select a **Grant, Category, and/or Line Item** to view (optional).

4. Click **Run**.
5. Click an expense **description**.

**Note**

Expenses cannot be added or edited if the grant's GL Actual Entry Method is set to **Import Only**.

## How To Add an Expense

Expenses may be added through the Expenses list, the grant budget, or the grant's *Post-Award tab*>*Expenses*. Expenses can only be added by Responsible Individuals, Grant Managers, and Organizational Administrators. Depending on your account settings, additional fields may be required in a *Custom tab*.

1. Open **Activity**>**Expenses**.
2. In the *Expenses* section, click the **+** (**Create Expense icon**) next to *All Expenses*.




3. In the pop-up window, select a **Grant**.
4. Select a **Category**.
5. Select a **Line Item**.
6. Add the **Direct Cost** or **Salary amount**.
7. Check the **Exclude From Match** checkbox if necessary.
8. Select an **Expense Date**.
9. Select the **Expense Status**.
  - **New:** A new expense
  - **Matched:** The expense has been added manually and imported
  - **Reviewed:** The expense has been reviewed
  - **Payment Requested:** The expense has been invoiced to the funder
  - **Paid:** The expense has been paid by the funder
  - **Denied:** The expense has been denied by the funder
10. Select **Payee type** and **Payee**, or **Create New payee** and add **Payee name**.  
The payee is the entity that received the expense funds in exchange for services or goods.
11. Add a **Description** (optional).
12. Click **Save**.


 **Note**

Expenses cannot be deleted if the grant's GL Actual Entry Method is set to **Import Only**.

## How To Edit an Expense

Expenses may be edited by Responsible Individuals, Grant Managers, and Organizational Administrators. Expenses cannot be edited once their Tracking Interval is closed.

1. Open **Activity>Expenses**.
2. In the *Expenses View Settings* section, select a **Time Frame** to view.
3. Select a **Grant, Category, and/or Line Item** to view (optional).
4. Click **Run**.
5. Click the  (**Edit icon**) next to an expense description.

Description	Expense Status	Origin	Created By
Expense 	New	Manual	admin


6. In the pop-up window, update the information as necessary.
7. Click **Update**.

 **Note**

Expenses cannot be added or edited if the grant's GL Actual Entry Method is set to **Import Only**.

## How To Delete an Expense

Expenses may be deleted by Responsible Individuals, Grant Managers, and Organizational Administrators. Expenses cannot be deleted once their Tracking Interval is closed.

1. Open **Activity>Expenses**.
2. In the *Expenses View Settings* section, select a **Time Frame** to view.
3. Select a **Grant, Category, and/or Line Item** to view (optional).
4. Click **Run**.
5. In the *Expenses* section, check the **checkbox** to the left of an expense.
6. Click the  (**Delete icon**) below *Actions*.

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

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

 **Note**

Expenses cannot be added or edited if the grant's GL Actual Entry Method is set to **Import Only**.

## How To Mark an Expense as Reviewed

Expenses may be marked as reviewed by Responsible Individuals, Grant Managers, and Organizational Administrators. This will change the expense

status to Reviewed.

1. Open **Activity>Expenses**.
2. In the *Expenses View Settings* section, select a **Time Frame** to view.
3. Select a **Grant, Category, and/or Line Item** to view (optional).
4. Click **Run**.
5. In the *Expenses* section, check the **checkbox** to the left of an expense.
6. Click the **✓ (Mark as Reviewed icon)** below *Actions*.



7. In the confirmation pop-up window, click **Complete**.

## How To View Attached Files

AmpliFund supports unlimited document storage and various file types. To learn more about supported files, view the [AmpliFund Document Management Guide](#).

Once a file has been attached to an expense, it is stored within the expense and grant records.

1. Open **Activity>Expenses**.
2. In the *Expenses View Settings* section, select a **Time Frame** to view.
3. Select a **Grant, Category, and/or Line Item** to view (optional).
4. Click **Run**.
5. Click an expense **description**.
6. In the pop-up window, open the **Attachment tab**.
7. Click the **attachment name**.

## Icons



Print



Help

# Program Income

Grants can track program income by the program's activities.


## How To View Program Income

1. Open **Activity>Program Income**.
2. Hover over the **grant name** to show the dropdown menu arrow.
3. Click the **dropdown arrow**.
4. Select **View**.




## How To Add Program Income

1. Open **Activity>Program Income**.
2. Hover over the **grant name** to show the dropdown menu arrow.
3. Click the **dropdown arrow**.
4. Select **Edit**.
5. Update the information as necessary.
6. Click **Update**.

-- OR --

1. Open **Activity>Program Income**.
2. Hover over the **grant name** to show the dropdown menu arrow.
3. Click the **dropdown arrow**.
4. Select **View**.
5. Click the  (**Edit icon**) in the *Icon Bar*.
6. Update the information as necessary.
7. Click **Update**.

Icons

-  Print
-  Help
-  Edit

# Timesheets

*For clients with the Time and Effort Certification module*

Timesheets allow grant-funded staff to report their actual time spent on awards. Staff members submit timesheets to their supervisor for approval and certification. Users will only be able to view their timesheets.

The Timesheet list shows the *Name*, *Start Date*, *End Date*, and *Timesheet 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 modifying AmpliFund page views.

Staff members record their time on a monthly basis by default. The reporting frequency can be changed to weekly on each staff's details page (*Contacts>Staff>staff name*).

If a staff member is tracking time monthly, their timesheets will have one editable *Hours* column. If a staff member is tracking time weekly, their timesheets have editable columns for each week.

Grant	Project	Hours
Flood Mitigation Assistance Program		0.00

## Funded and Unfunded Time

Timesheets are divided into two main sections: Funded Time and Unfunded Time. This allows staff members to record which grant(s) they spent their time on, and any other time worked during the month.

Funded Time is time being charged to a grant for an employee's compensation and benefits. A personnel line item on a grant will generate a Staff timesheet. If a Staff member has personnel line items on multiple grants, they will track their time on one timesheet.

Unfunded Time is any other time a staff member works. By adding time not spent on grants, the system may calculate 100% of that staff person's time. It is necessary to record Unfunded Time to ensure that all of a staff person's time is accounted for.

## How To View a Timesheet

1. Open **Activity>Timesheets>Active** to view timesheets that have been rejected or not submitted. Open **Activity>Timesheets>Completed** to view timesheets that have been submitted, certified, or approved.



2. Click a **timesheet name**.


## How To Add a Timesheet

1. Open **Activity>Timesheets>Active**.
2. Click the **+** (**Create icon**) in the *Icon Bar*.
3. In the pop-up window, select a **Timesheet Interval**.
4. Click **Create**.
5. Select to add your time in **Hours** or **Percentage**.
  - a. If *Percentage*, add **Total Hours Worked** for the time period in the *Time Entry* section.
6. Add your **time** in hours or percentage (do not include % symbol).
7. Add **Notes** for each line or for the timesheet (optional).
8. Click **Select files...** to add any attachments.
9. Click **Save**.

### **Note**

You can only edit timesheets that have not been submitted


## How To Edit a Timesheet


1. Open **Activity>Timesheets>Active**.
  2. Click the **(Edit icon)** next to a timesheet name.
  3. Update the information as necessary.
  4. Click **Save**.
- OR --
1. Open **Activity>Timesheets>Active**.
  2. Click a **timesheet name**.
  3. Click the  (**Edit icon**) in the *Icon Bar*.
  4. Update the information as necessary.
  5. Click **Save**.

### **Note**



Once the timesheet has been submitted, it can no longer be edited.

## How To Submit a Timesheet

1. Open **Activity>Timesheets>Active**.
  2. Click the  (**Edit icon**) next to a timesheet name.
  3. Click **Submit** to submit the timesheet to the supervisor.
- OR --

1. Open **Activity>Timesheets>Active**.
2. Click a **timesheet name**.
3. Click the  (**Edit icon**) in the *Icon Bar*.
4. Click **Submit** to submit the timesheet to the supervisor.

## Icons

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# Timesheet Approvals

*For clients with the Time and Effort Certification module*

Timesheet Approvals allow supervisors and additional approvers to approve and certify staff timesheets.

The Timesheet list shows the *Name, Employee, Start Date, End Date, Total Hours,* and *Timesheet 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 modifying AmpliFund page views.

Staff members record their time on a monthly basis by default. The reporting frequency can be changed to weekly on each staff's details page (*Contacts>Staff>staff name*).

## How To Approve a Timesheet

*For Supervisors*

1. Open **Activity>Timesheet Approvals>Active**.
2. Click a **timesheet name**.
3. Add **Approver Comments** (optional).
4. Click **Approve**.

## How To Reject a Timesheet

*For Supervisors*

1. Open **Activity>Timesheet Approvals>Active**.
2. Click a **timesheet name**.
3. Add **Approver Comments** (optional).
4. Click **Reject**. The timesheet will be returned to the employee for editing.

## How To Certify a Timesheet



*For Additional Approvers*

Prerequisite: If **Require HR Import for timesheet certification** is selected in *Administration>License Information*, HR actuals must be imported. See the [AmpliFund Administration Guide](#) to learn more on importing HR actuals.

1. Open **Activity>Timesheet Approvals>Active**.
2. Click a **timesheet name**.

3. Click **Certify**.
4. In the pop-up window, add your **name** in the *Signature* field.
5. Select a **Certified Date**.
6. Click **Save and Export to PDF**.

Icons

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# Payment Request Approvals

*For clients with Sub-Recipient Licenses*

Payment Request Approvals allows funders to view any open payment requests submitted by their recipient organizations. The funder Organizational Administrator(s) will receive email notifications when payment requests are submitted.

The Payment Request Approvals list shows the *Grant Name*, *Recipient Grant Manager*, *Grant Start Date*, and *Grant End Date* by default. Once a grant has been selected, the list shows *Payment Request Name*, *Date Created*, *Date Submitted*, *Submitted By*, *Amount Requested*, 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 modifying AmpliFund page views.

## Note

Once approved, you can no longer make changes to the payment request.

## How To Approve a Payment Request

1. Open **Activity>Payment Request Approvals**.
2. Click a **grant name**.
3. Click a **payment request name**.
4. In the *Response* section, update the **Approved Amount** as necessary. This defaults to the Requested Amount.

Response
<div style="display: flex; justify-content: space-between; align-items: center;"> <span>Approved Amount*</span> <input style="border: 1px solid #ccc; padding: 2px 10px;" type="text" value="\$500.00"/> </div>

5. Add **Comments** (optional). These will be visible to the recipient.
6. Click **Approve**. This will send your payment request response to the recipient.




## Note

Once rejected, you can no longer make changes to the payment request.

## How To Reject a Payment Request

1. Open **Activity>Payment Request Approvals**.
2. Click a **grant name**.
3. Click a **payment request name**.
4. Add **Comments** (optional). These will be visible to the recipient.
5. Click **Reject**. This will change the Approved Amount to \$0.00 and send your payment request response to the recipient.

Icons

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# Tracking Periods

Tracking periods allows managers and admin users to internally track the health and progress of their grants in regularly segmented intervals over the lifetime of the grants. Tracking periods can include expenses, achievements, timesheets, and program income. Grant Managers, Department Admin, and Organizational Administrators can view, create, edit, and close tracking periods. Organizational Administrators can reopen closed tracking periods.

Tracking periods may be related to a funding organization's reporting requirements. Recipient clients will use reporting periods to send grant progress directly to their AmpliFund funding organization. For more information, see [Reporting Periods](#).

## How To View a Tracking Period

Tracking periods are divided into open and closed tracking periods. Only open tracking periods can be edited.

1. Open **Activity>Tracking Periods>Open** or **Activity>Tracking Periods>Closed**.
2. Click a **grant name**.
3. Click a **tracking period start date**.

## How To Add a Tracking Period

1. Open **Activity>Tracking Periods>Open**.
2. Click the **+** (**Create icon**) in the *Icon Bar*.
3. In the pop-up window, select a **grant**.
4. Select the **types of tracking periods** to include. This could include [Expenses](#), [Achievements](#), [Timesheets](#), and/or [Program Income](#).

What types of tracking periods would you like to include?

- Expenses
- Achievements
- Timesheets
- Program Income

5. Select a **period of time**.
6. Click **Save**.

**Note**

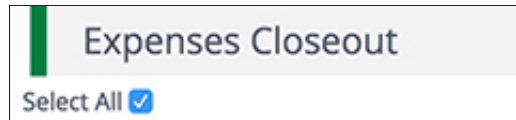
Depending on your account settings, this record type may have additional custom fields or sections.

## How To Add an **Expenses** Tracking Period



From the *Expenses tab*, you can review expense details, view expense analytics, and select expenses to close out in the tracking period.

1. In the *Overall Expense Details* section, add **Comments** (optional).
2. To attach documentation, click **Choose File** (optional) and select a file from your computer.
3. In the *Expenses Closeout* section, select expense **category names** to close out. The Total Amount for the category includes any reviewed expenses for the period. To select all expenses, check the **Select All checkbox**.



4. Click **Save** to save your progress, or **Close** to close the tracking period.

**Note**

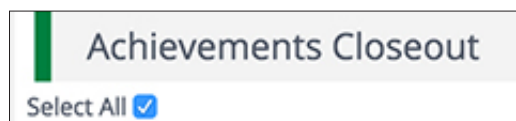
Once closed, users may not edit any expenses, achievements, timesheets, or program income within the closed tracking period.

## How To Add an **Achievements** Tracking Period



From the *Achievements tab*, you can review achievement details, view achievement analytics, and select achievements to close out in the tracking period.

1. In the *Overall Achievements Details* section, add **Comments** (optional).
2. To attach documentation, click **Choose File** (optional) and select a file from your computer.
3. In the *Achievements Closeout* section, select **goals** to close out. To select all goals, check the **Select All checkbox**.



4. Click **Save** to save your progress, or **Close** to close the tracking period.

**Note**

Once closed, users may not edit any expenses, achievements, timesheets, or program income within the closed tracking period.

**Note**

Depending on your account settings, this record type may have additional custom fields or sections.

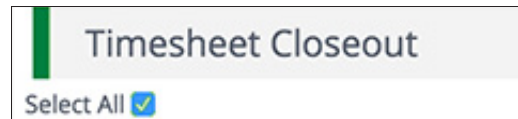
## How To Add a **Timesheets** Tracking Period

*For clients with Time and Effort Certification*



From the *Timesheets tab*, you can review timesheet details and select timesheets to close out in the tracking period.

1. In the *Overall Timesheet Details* section, add **Comments** (optional).
2. To attach documentation, click **Choose File** (optional) and select a file from your computer.
3. In the *Timesheet Closeout* section, select **employees** to close out. To select all goals, check the **Select All** checkbox.



**Note**

Once closed, users may not edit any expenses, achievements, timesheets, or program income within the closed tracking period.

4. Click **Save** to save your progress, or **Close** to close the tracking period.

## How To Add a **Program Income** Tracking Period

**Note**

Depending on your account settings, this record type may have additional custom fields or sections.



1. In the *Overall Program Income Details* section, add **income Earned for Period**.
2. Add **Comments** (optional).
3. To attach documentation, click **Choose File** (optional) and select a file from your computer.
4. Click **Save** to save your progress, or **Close** to close the tracking period.

**Note**

Once closed, users may not edit any expenses, achievements, timesheets, or program income within the closed tracking period.

## How To Edit a Tracking Period

Prerequisite: Must be an open tracking period

1. Open **Activity>Tracking Periods>Open**.
2. Click a **grant name**.
3. Click a **tracking period start date**.



 **Note**

Once closed, users may not edit any expenses, achievements, timesheets, or program income within the closed tracking period.

 **Note**

Once closed, users may not edit any expenses, achievements, timesheets, or program income within the closed tracking period.

4. Click the **tabs** to navigate to the different tracking period types.
5. Update the information as necessary.
6. Click **Save** to save your progress, or click **Close** to close the tracking period.

## How To Close a Tracking Period




1. Open **Activity>Tracking Periods>Open**.
2. Click a **grant name**.
3. Click a **tracking period start date**.
4. Click **Close** to close the tracking period.
5. In the confirmation pop-up window, click **Close**.

## How To Open a Tracking Period

Prerequisite: Must be an Organizational Administrator.

1. Open **Activity>Tracking Periods>Closed**.
2. Click a **grant name**.
3. Click a **tracking period start date**.
4. Filter by **Closed** status.
5. Click **Open** to reopen the tracking period for editing.

## Icons

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# Reporting Periods

*For clients with Sub-Recipient Licenses*

Reporting periods allow your recipients and sub-recipients to report on the health and progress of their awards in regularly segmented intervals over the lifetime of the awards. Reporting periods can include expenses or achievements. Funder Grant Managers, Department Admin, and Organizational Administrators can view and reject closed recipient reporting periods.

## How To View a Reporting Period

1. Open **Activity>Reporting Periods**.
2. Click a **grant name**.
3. Click a **reporting period start date**.

## How To Reject a Reporting Period

1. Open **Activity>Reporting Periods**.
2. Click a **grant name**.
3. Click a **reporting period start date**.
4. Click **Reject** to reject the reporting period and send it back to the recipient for editing.