Documents User Guide

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Documents Overview

Documents allows users to access all uploaded files from your organization. Users can create folders and upload a variety of supported file types. Users can view folders based on their security roles; Organization Administrators can access all documents.

There is not a limit to the number of folders or files you may store in AmpliFund.

Icons

- Print
- Help
- Upload Documents
- Create Folder
- Edit
- Delete
- Download

Document Folders

AmpliFund contains system-generated folders that are accessible from *Documents*. Additionally, users can create folders within these main system folders. The *Administrator* and *Public* folders are only accessible from *Documents*; however, the *Funds*, *Grants*, *Individuals*, *Organizations*, *Projects*, and *Staff* folders can be accessed from the fund, grant, individual, organization, project, and staff records, respectively.

The Documents list shows the *Name*, *Type*, *Created By*, *Date Created*, *Last Modified*, and *File Size* columns by default. There are no other columns available. 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.

Main System Folders

Main system folders can be accessed from the Document section of the left navigation panel.

Administrator

The Administrator folder and its contents are only visible Organizational Administrators and Executives.

Funds (for clients with the Fund Management module)

The Funds folder is visible to Organizational Administrators, Executives, Fund Admin, and Fund Users. This folder contains system-generated folders for fund records that have been added in *Fund Management>Funds*. Users only have access to fund documents if they have access to the fund record.

Grants

The Grants folder and its contents are visible to all users except Researchers. This folder contains system-generated folders for grant records that have been added in *Grant Management>All Grants*. Additionally, if files are attached to grant-related records, the files will be available in a system-generated folder. For more information, see System-Generated Folders. Users only have access to grant documents if they have access to the grant record. Funding organizations will have visibility into their sub-awards' folders.

Individuals

The Individuals folder and its contents are visible to all users except Researchers. This folder contains system-generated folders for individual and staff records that have been added in *Contacts>Individuals*.

Organizations

The Organizations folder and its contents are visible to all users except Researchers. This folder contains system-generated folders for organization records that have been added in *Contacts>Organizations*.

Projects (for clients with the Project Management module)

The Projects folder is visible to Organizational Administrators, Executives, Department Admin, Department Users, Project Admin, and Project Users. This folder contains system-generated folders for project records that have been added in *Project Management>Projects*. Users only have access to project documents if they have access to the project record.

Public

The Public folder and its contents are visible to all users.

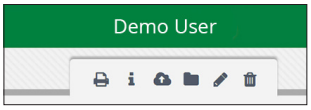
Staff

The Staff folder and its contents are visible to all users except Researchers. This folder contains system-generated folders for staff records that have been added in *Contacts>Staff*.

How To Add a Folder

Users can create folders and sub-folders within the main system folders. Folders created on the object record will also appear in *Documents*, and vice versa.

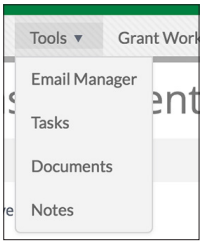
1. Open **Documents>folder**.
2. Click the **(Create Folder icon)** in the *Icon Bar*.



3. In the pop-up window, add a folder **Name**.
4. Click **Create**.

--OR--

1. Open an **object record**, such as a fund, grant, or individual.
2. Open the **Tools tab>Documents**.



3. Click the **(Create Folder icon)** in the *Icon Bar*.
4. In the pop-up window, add a folder **Name**.
5. Click **Create**.

Note
System-generated folder names will automatically update when the parent object's name has been changed.

How To Edit a Folder Name

Folders can be renamed or moved to a different parent folder.

Prerequisite: Must be a user-created folder.

1. Open **Documents>folder**.
2. Click the **(Edit icon)** next to a folder name.

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

How To Move a Folder

Folders can be renamed or moved to a different parent folder.

Prerequisite: Must be a user-created folder.

1. Open **Documents>folder**.
2. Click the **(Edit icon)** next to a folder name.

3. In the pop-up window, select a **parent folder** from the *Move To* dropdown.

4. Click **Save**.

Warning
Deleting a folder will also delete all files and sub-folders contained within the folder. This action cannot be undone.

How To Delete a Folder

User-created folders may be deleted at any time. System-generated folders are only deleted if the parent object is deleted.

Prerequisite: Cannot contain records that cannot be deleted.

1. Open **Documents>folder**.
2. Click the **(Delete icon)** next to a folder name.

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

Icons

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- Download

Document Files

One or more files may be uploaded into a folder at a time. There is no limit to the file size that may be uploaded. Files uploaded to an object's *Tools tab>Documents* will also appear in *Documents*.

The following file types and extensions can be uploaded into AmpliFund.

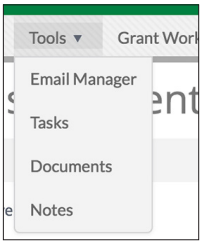
File Type	Extensions
Comma Separated Values	.csv
Image	.bmp, .jpg, .png, .tif, .tiff,
Microsoft Excel	.xls, .xlsx, .xlt, .xltx
Microsoft PowerPoint	.ppt, .pptx
Microsoft Word	.doc, .docx, .dot, .dotx
PDF	.pdf
Text	.txt

How To View a Document

1. Open **Documents>folder**.
2. Click a **file name**.

--OR--

1. Open an **object record**, such as a fund, grant, or individual.
2. Open the **Tools tab>Documents**.



3. Click a **file name**.

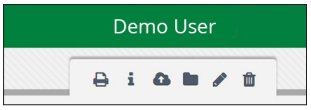
Note

Depending on your browser settings, the document may download automatically.

How To Add a Document

There is no limit to the file size that may be uploaded. Files will be added to the current folder being viewed.

1. Open **Documents>folder**.
2. Click the **(Upload Document icon)** in the *Icon Bar*.

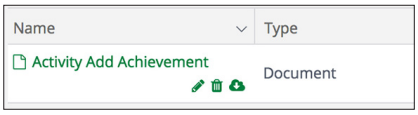


3. In the pop-up window, click **Choose a file** to upload file(s) from your computer.
4. Click **Upload**.

How To Edit a Document

Documents can be renamed, replaced, or moved to a different folder.

1. Open **Documents>folder**.
2. Click the **(Edit icon)** next to a document name.

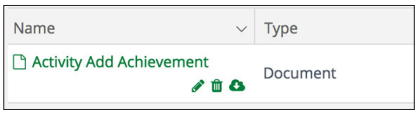


3. In the pop-up window, update the information as necessary.
4. Click **Save**.

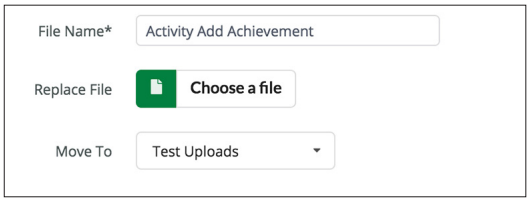
How To Move a Document

Documents can be renamed, replaced, or moved to a different folder.

1. Open **Documents>folder**.
2. Click the **(Edit icon)** next to a file name.



3. In the pop-up window, select a **parent folder** from the *Move To* dropdown.

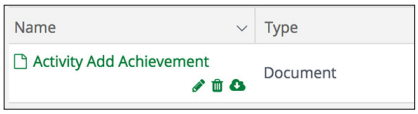


4. Click **Save**.

How To Delete a File

1. Open **Documents>folder**.

2. Click the **(Delete icon)** next to a file name.

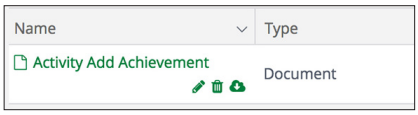


3. In the confirmation pop-up confirmation, click **Delete**.

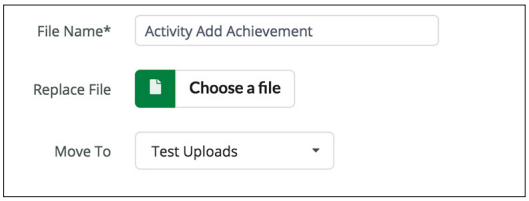
How To Replace a Document

Documents can be renamed, replaced, or moved to a different folder. The document will retain the same name, and the *Last Modified* information will update.

1. Open **Documents>folder**.
2. Click the **(Edit icon)** next to a file name.



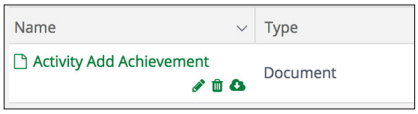
3. In the pop-up window, click **Choose a file** to select a file from your computer.



4. Click **Save**.

How To Download a Document

1. Open **Documents>folder**.
2. Click the **(Download icon)** next to a file name.



System-Generated Folders

When files are attached to records in AmpliFund, corresponding folders are automatically created by the system in *Documents*.

Administrator

Expense Imports — The Expense Imports folder contains all imported expense files. These can also be accessed from *Administrator>Actuals>Expenses*.

Time & Effort Certifications — The Time & Effort Certifications folder contains all certified timesheets.

Funds

Fund — Fund folders are created for each fund record.

Grants

Achievements — The Achievements folder is located in the Post-Award>Performance folder and contains documents attached to achievements.

Amendments — The Amendments folder is located in the Post-Award>Management folder and contains documents attached to amendments.

Budget — The Budget folder is located in the Post-Award>Financial folder and contains documents attached to post-award budget line items.

Cash Flow — The Cash Flow folder is located in the Post-Award folder and contains the Payment Requests, Payment Authorizations, and Cash Receipts folders.

Cash Receipts — The Cash Receipts folder is located in the Post-Award>Cash Flow folder and contains documents attached to cash receipts.

Custom — The Custom folder contains documents attached to custom forms (for clients with Advanced Data Collection).

Email Manager — The Email Manager folder is located in the Post-Award>Tools folder and contains documents attached to grant emails sent through AmpliFund.

Expenses — The Expenses folder is located in the Post-Award>Financial folder and contains documents attached to expenses.

Financial — The Financial folder is located in the Post-Award folder and contains the

	Budget and Expenses folders.
Grant	Grant folders are created for each grant record.
Management	The Management folder is located in the Post-Award folder and contains the Reporting Periods, Tracking Periods, and Amendments folders.
Notes	The Notes folder is located in the Post-Award>Tools folder and contains documents attached to grant notes.
Payment Authorizations	The Payment Authorizations folder is located in the Post-Award>Cash Flow folder and contains documents attached to payment authorizations.
Payment Requests	The Payment Requests folder is located in the Post-Award>Cash Flow folder and contains documents attached to payment requests.
Performance	The Performance folder is located in the Post-Award folder and contains the Performance Plan and Achievements folders.
Performance Plan	The Performance Plan folder is located in the Post-Award>Performance folder and contains documents attached to post-award performance goals.
Pre-Award	The Pre-Award folder contains the Submission Performance Plan and Submission Budget folders.
Post-Award	The Post-Award folder contains the Financial, Performance, Cash Flow, and Management folders.
Reporting Periods	The Reporting Periods folder is located in the Post-Award>Management folder and contains documents attached to reporting periods.
Submission Budget	The Submission Budget folder is located in the Pre-Award folder and contains documents attached to submission line items.
Submission Performance Plan	The Submission Performance Plan folder is located in the Pre-Award folder and contains documents attached to submission goals.
Tools	The Tools folder is located in the Post-Award folder and contains the Email Manager and Notes folders.
Tracking Periods	The Tracking Periods folder is located in the Post-Award>Management folder and contains documents attached to tracking periods.

Individuals

Email Manager	The Email Manager folder is located in the Post-Award>Tools folder and

contains documents attached to grant emails sent through AmpliFund.

Individual — Individual folders are created for each individual contact record.

Notes — The Notes folder is located in the Post-Award>Tools folder and contains documents attached to grant notes.

Tools — The Tools folder is located in the Post-Award folder and contains the Email Manager and Notes folders.

Organizations

Email Manager — The Email Manager folder is located in the Post-Award>Tools folder and contains documents attached to grant emails sent through AmpliFund.

Organization — Organization folders are created for each organization contact record.

Notes — The Notes folder is located in the Post-Award>Tools folder and contains documents attached to grant notes.

Tools — The Tools folder is located in the Post-Award folder and contains the Email Manager and Notes folders.

Projects

Project — Project folders are created for each project record.

Staff

Email Manager — The Email Manager folder is located in the Post-Award>Tools folder and contains documents attached to grant emails sent through AmpliFund.

Staff — Staff folders are created for each staff record.

Notes — The Notes folder is located in the Post-Award>Tools folder and contains documents attached to grant notes.

Tools — The Tools folder is located in the Post-Award folder and contains the Email Manager and Notes folders.