

AmpliFund 

Pre-Award Grant Management

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Grant Overview

The *Grant* module is available to all AmpliFund users and allows users to view, create, edit, and delete grant records. The module contains Research (for users with the *Research* module), All Grants, Pending Grants, Active Grants, Denied Grants, Cancelled Grants, Closed Grants, Completed Grants, and Deleted/Disabled Grants.

Each grant record contains the grant's details, submission performance plan and settings, submission budget and settings, tools, and grant workflow (for users with the *Workflow* module).

Icons

-  Print
-  Help
-  Favorite
-  Imported to Grants

Research

For clients with the Research module

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

The Researcher user security role allows organizations to designate users that will research grant opportunities. This role is intended for users that will be researching grant opportunities only; they will not be involved with applying for or managing grants. To learn more about security roles, see [Security Roles](#).

To learn more about AmpliFund Research, see the [AmpliFund Grant Research Guide](#).

How To Search for Grant Opportunities

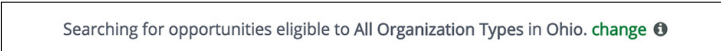
The Research module allows you to filter grant opportunities by eligibility, category, funder type, and deadline, as well as by search terms, partial words, and phrases. The full-text index search supports search terms; partial words (i.e. “Edu”); phrases; as well as “and”, “or”, and “not” logic (i.e.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

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



Search field containing the text "clean" and a search icon. To the right, it says "Searching for opport". Below the search field is a checkbox labeled "Show archived records".

3. Check the **Show archived records checkbox** as desired. This will include any closed or archived opportunities in your search results.
4. By default, your search will include opportunities available to All Organization Types in All Locations. To filter, click **Change**.



Search field showing the filter "Searching for opportunities eligible to All Organization Types in Ohio." followed by a "change" link and an information icon.

- a. In the pop-up window, select eligible **Organization types** and **Locations**. Hold **Control/Command** and **click** to select multiple entries.
5. Click **Save**.

6. Select **Program Categories** (optional). Hold **Control/Command** and **click** to select multiple categories.
7. Select **Funder Types** (optional). Hold **Control/Command** and **click** to select multiple types.
8. If your search includes *Federal Government* as a Funder Type, select **Federal Departments** (optional). Hold **Control/Command** and **click** to select multiple departments.
9. Select a Submission Close Date window with the **After** and/or **Before** fields (optional).
10. Click **Search**.

Note

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

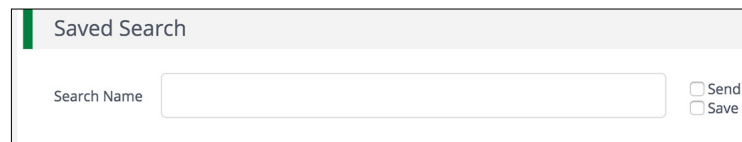
How To Save a Search

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

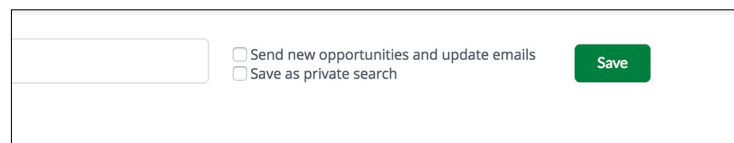
1. Open **Research>New Search**.
2. Add your **search criteria**.
3. Click **Search**.

Saved Search

4. Add the **Search Name**.



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



7. Click **Save**.

How To Set Up Research Email Notifications

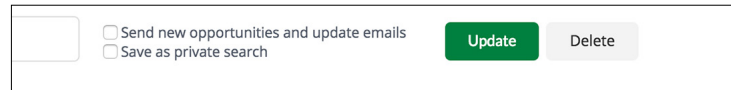
Email notifications can be set up from saved search criteria. The email will include all new opportunities and updates that match your search criteria

on a daily basis. The notifications will also appear in Activity>Message Center. You will stop receiving email notifications if the saved search is deleted. You can also stop email notifications at any time.

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

Saved Searches

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



The screenshot shows a settings form for saved searches. It contains two checkboxes: "Send new opportunities and update emails" and "Save as private search". To the right of the checkboxes are two buttons: a green "Update" button and a grey "Delete" button.

3. Click **Update**.

How To Save a Grant Opportunity

After searching for a grant opportunity, you can save it from the *Results* section. Once saved privately or publicly, the opportunity will appear in *Research>My Saved Opportunities* or *Research>All Saved Opportunities*, respectively. Saved opportunities can be sent for internal review or imported as a Pre-Award Grant.

Results

4. Click an **opportunity name**.
5. Click the ☆ (**Favorite icon**) in the *Icon Bar*.
6. In the pop-up window, add the opportunity **Name**.
7. Add a **Description** (optional).
8. Check the **Private checkbox** to save privately, or leave unchecked to save publicly.
9. Click **Add**.

How To Send a Grant Opportunity for Review

Once saved, opportunities can be sent to other users with Research access for review. These users can view the opportunity, add any comments, and then reject or convert the opportunity to a pre-award grant.

1. Open a **saved opportunity**.
2. Click **Send to Opportunity Review**.
3. In the pop-up window, select **user(s) to notify and review this opportunity**. This list pulls from any users with access to the Research module.

Select user(s) to notify and review this grant

Select User(s)...

4. Add your **Comments** (optional). These will be visible to the user(s) you've selected.
5. Click **Send**. This will send a notification email to the user(s) you've selected.

How To Review a Grant Opportunity Opportunity

Opportunities for review can be rejected or converted to a pre-award grant. Converted grants will appear in the Grant Management module.













1. Open **Research>Opportunities for Review**.
2. Click an **opportunity name**.
3. Click **Reject** or **Convert to a Pre-Award Grant**.

How To Convert an Opportunity to a Pre-Award Grant

Opportunities found through the Research module can be converted to pre-award grants in the *Grant Management>Grants*.

1. Open **Research>Opportunities for Review**.
2. Click an **opportunity name**.
3. Click **Convert to a Pre-Award Grant**.
4. In the pop-up window, edit the **Grant Name**.
5. Add a **Grant Manager**. This list pulls from *Contacts>Staff*.
6. Select a **Projected Receipt Date**. This information is necessary for the import process, but can be adjusted later if necessary.
7. Add **Estimated Program Length** in years and additional months. This information is necessary for the import process, but can be adjusted later if necessary.
8. Select to **Create New Grantor** record or to **Link Existing Grantor** if grantor already exists in *Contacts>Organizations*.
9. Select a **grant workflow** to add the pre-award grant to (optional).
10. Click **Save**. Once converted, the grant will have a  icon next to its name in the *Opportunities Submitted for Review* list.

Icons

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

Grants

Grants includes all grants that an organization has begun to apply for, applied for, received, or been denied. Grants may be accessed from lists organized by award status within the Grant Management module.

The Grants list shows the *Name, Grantor, Award Status, Total Awarded Amount, Fiscal Year Received, Close Out Date, and Status* columns by default. Most of the fields that appear on the grant details page can be added to the grid. 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 filter on grid views.

Grant Security

In addition to AmpliFund's User Security Roles, users can have additional security permissions per grant, based on their affiliation to the grant. Users can be selected as Grant Writers, Grant Managers, Additional Staff, Responsible Individuals. These users will be able to view the grant, regardless of their user type.

Grant Writers	Grant Writers can view grant details, performance plans, and budget plans. They cannot create, edit, or delete grant details, goals, or line items.
Grant Managers	Grant Managers have full access to edit grant details, and create, edit, and delete all items related to their grant. These users may also assign responsibility for goals and line items to other users.
Additional Staff	Additional Staff can view grant details, performance plans, and budget plans. They cannot create, edit, or delete grant details, goals, or line items.
Responsible Individuals	Responsible Individuals are responsible for overseeing a performance goal or line item's completion. They can view grant details, performance plans, or budget plans.

How To View a Grant

The Grant Details page shows information about the grant. From the Grant Details page, Pre-Award information, Tools, and Grant Workflows (for users with the *Workflow* module) can be accessed.

1. Open **Grant Management > Grants > All Grants**.
2. Click a **grant name**.

How To Add a Grant

Prerequisite: Must be an Organizational Administrator or Department Admin

1. Open **Grant Management>Grants>All Grants**.
2. Click the **+** (**Create icon**) in the *Icon Bar*.

Grant Information

3. Add a grant **Name**.
4. Select the **Grantor**. This list pulls from *Contacts>Organizations*.
5. Add the **RFP ID Number** (Request For Proposal Identification Number), **Funding Opportunity Number**, and/or **CFDA Number** (Catalog of Federal Domestic Assistance Number) (optional).

Pre-Award

6. Select if the funder requires a **Letter of Intent**.
 - a. If Yes, select a **Letter of Intent Due Date**.
7. Add the **Proposed Length of Award** in years and any additional months.
8. Select the **Proposal Open Date** and **Proposal Close Date** (optional). These are the dates when the funder starts and stops accepting applications, respectively.
9. Select the **Proposal Submitted Date** (optional).
10. Select the **Projected Receipt Date**. This is the expected date of award notification/receipt. This date must be added in order to calculate submission performance and budget plan allocations.
11. Select **Grant Writer(s)** (optional). This list pulls from *Contacts>Staff*. Grant Writers may view grant details, performance plans, and budget plans. They cannot create, edit, or delete grant details, goals, or line items.
12. Select associated **Department(s) or Program(s)** (optional). This list pulls from *Administration>System Security>Departments*.
13. Select associated **Subject(s)** (optional). This list pulls from *Administration>Lists>Subjects*.
 - a. To create a new subject, click the **+** (**Create icon**) next to the *Subject(s)* field.

The screenshot shows a rectangular input field with the text 'Subject(s)' on the left. Inside the field is a dropdown menu with the text 'Select Subject(s)...'. To the right of the dropdown is a plus sign icon (+).
 - b. In the pop-up window, add a subject **Name**.
 - c. Click **Create**. This will add the subject to *Administration>Lists>Subjects*.
14. Select **Additional Staff** (optional). This list pulls from *Contacts>Staff*. Additional Staff may view grant details, performance plans, and budget plans. They cannot create, edit, or delete grant details, goals, or line items.

15. Add the **Weight** percentage of the pre-award grant in decimal format (optional). The weight can help you prioritize your pre-award grants.

Pre-Award Budget

16. Add the **Requested Amount, Cash Match Requirement, and/or In-Kind Match Requirement** (optional).

Description

17. Add **Description, Award Details, Eligibility Requirements, and Additional Information** (optional).

Status

18. Select **Award Status** and **Award Type**.

Post-Award

19. Select a **Grant Manager**. This list pulls from *Contacts>Staff*. Grant Managers have full access to edit grant details, and create, edit, and delete all items related to their grant. These users may also assign responsibility for goals and line items to other users.
20. Select the **Awarded Date** and **Length of Award** in years and any additional months (optional).
21. Select the award **Start Date, End Date, and Close Out Date** (optional).
22. Add the **Activity Code, Federal Agency and Organizational Element, Identifying Number Assigned by Federal Agency, and/or Recipient Account Number** (optional).
23. Select the **Budget Tracking Interval**.
24. Select the **Due Date for Budget Items** (optional).
25. Select the **Performance Tracking Interval**.
26. Select the **Due Date for Performance Items** (optional).
27. Select the **GL Actual Entry Method**.
28. Add the grant **Financial Code** (optional). This is a unique code that will help identify the grant during import.

Note

If **Import Only** is selected, users will not be able to add, edit, or delete line item expenses.

Post-Award Budget

29. Add **Awarded Amount, Cash Match Amount, and In-Kind Match Amount** (optional).

Default Settings for Sending Task Reminders


30. Select dates for **Default Task Reminders, Default Budget Reminders, and Default Performance Reminders** (optional). AmpliFund automatically will send email reminders to Responsible Individuals on these dates.

Record Information

31. Add a **Unique Identifier** (optional).
32. Select the grant record **Status**.
33. Click **Create**.

How To Edit a Grant

Prerequisite: Must be Organizational Administrator, Department Admin, or Grant Manager

1. Open **Grant Management > Grants > All Grants**.
2. Click the  (**Edit icon**) next to a grant name.



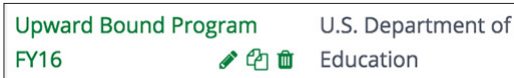
3. Update the information as necessary.
4. Click **Update**.

How To Copy a Grant

Copying a grant provides a quick method for pulling over all existing grant information into a new grant record. When a grant is copied, all information from the grant details pulls into the new grant record. Once copied, any grant-related information may be updated or deleted as needed.

Prerequisite: Must be an Organizational Administrator or Department Admin

1. Open **Grant Management > Grants > All Grants**.
2. Click the  (**Copy icon**) next to a grant name.



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

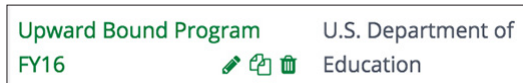
How To Delete a Grant

Deleting a grant removes the grant from the Grants lists, but does not completely remove the record from AmpliFund. Once deleted, the grant moves to the Deleted/Disabled Grants list. To completely remove the grant from AmpliFund, see [How To Purge a Grant](#).

Prerequisite: Must be an Organizational Administrator or Department Admin

1. Open **Grant Management > Grants > All Grants**.

- Click the  (**Delete icon**) next to a grant name.




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

How To Purge a Grant

To permanently and completely remove the grant from AmpliFund, it must be purged from the Deleted/Disabled Grants list.

Prerequisite: Must be an Organizational Administrator or Department Admin

- Open **Grant Management > Grants > Deleted/Disabled Grants**.
- Click a **deleted grant name**.
- Click the  (**Purge icon**) in the *Icon Bar*.




- In the confirmation pop-up window, click **Purge**.

How To Restore a Grant

Deleted grants can be restored from the Deleted/Disabled Grants list.

Prerequisite: Must be an Organizational Administrator or Department Admin

- Open **Grant Management > Grants > Deleted/Disabled Grants**.
- Click a **deleted grant name**.
- Click the  (**Restore icon**) in the *Icon Bar*.




- In the confirmation pop-up window, click **Restore**.

How To Disable a Grant

Disabling grants removes the grant from grants lists. Disabled grants will not appear in reports.

Prerequisite: Must be an Organizational Administrator or Department Admin

- Open **Grant Management > Grants > All Grants**.
- Click the  (**Edit icon**) next to a grant name.

Record Information

3. Select **Disabled** from the *Status* dropdown menu.

The screenshot shows a form titled "Record Information". It contains two input fields: "Unique Identifier" with the value "22512589" and "Status*" with a dropdown menu set to "Disabled".


4. Click **Update**.

Note

The Grantor, Grant Writers, Additional Staff, and Grant Manager Names must **exactly match** what is in the *Contacts* module and the Department(s) and Subjects must **exactly match** what is in the *Administration* module.


How To Import Grants

Users can import multiple grants using the [Grants Import Template](#) (recommended) or their own Excel file. The Grants Import Template includes the Name*, Grantor*, RFP ID Number, Funding Opportunity Number, CFDA Number, Letter of Intent Required*, Letter of Intent Due Date, Proposed Length of Award Years*, Proposed Length of Award Months*, Proposal Open Date, Proposal Close Date, Proposal Submitted Date, Projected Receipt Date, Grant Writer(s), Department(s) or Program(s), Subjects, Additional Staff, Weight, Requested Amount*, Cash Match Requirement, In-Kind Match Requirement, Description, Award Details, Eligibility Requirements, Additional Information, Award Status*, Award Type, Grant Manager First Name*, and Grant Manager Last Name*, and Status fields for pre-award grants. Required fields have asterisks (*) next to their names.

1. Open **Grant Management>Grants>All Grants**.
2. Click the  (**Import icon**) in the *Icon Bar*.
3. In the pop-up window, select **Grant Import** from the *Choose Import* dropdown.
4. Click **Choose a file** to select a file from your computer.
5. Select the **Destination** field for each Source column. If you are using the [Grants Import Template](#) (recommended), the source and destination fields should match.
6. Click **Import**.

How To Export the Grants List







Users can export the Grants list as a CSV or Excel file.

1. Open **Grant Management>Grants>All Grants**.
2. Click the  (**Export icon**) in the *Icon Bar*.
3. In the pop-up window, add a **File Name**.
4. Select the **Export Type**.
5. Click **Export**.

Grant Pre-Award

The *Pre-Award tab* allows users to create and manage submission performance plans, including various types of performance goals and strategies (which link goals together). Additionally, users can set up and manage their submission budget, including planned expenses, planned revenue, budget categories, line items, match, indirect, and benefits. Users should configure budget settings before creating their submission budget.

Icons

	Print
	Help
	Create/Add
	Performance Variance Report
	Edit
	Delete

Submission Performance Strategies


Strategies are overarching objectives which group together goals that have a common topic. The purpose of using strategies is to associate goals together. Strategies do not have a metric or measurable item assigned.

How To Add a Strategy

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award tab>Submission Performance Strategies**.
4. Click the **+** (**Create icon**) in the *Icon Bar*.
5. In the pop-up window, add a strategy **Name**.
6. Add a **Description** (optional).
7. Click **Create**.

How To Edit a Strategy

After strategies have been added, the name and description may be edited.


1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award tab>Submission Performance Strategies**.
4. Click the  (**Edit icon**) next to a strategy name.

Outline - Data and Feedback   Cre

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

How To Delete a Strategy

Prerequisite: Strategy cannot be linked to a performance goal

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award tab>Submission Performance Strategies**.
4. Click the  (**Delete icon**) next to a strategy name.

Outline - Data and Feedback   Cre

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

Icons

- Print
- Help
- Create/Add
- Submission Performance Plan Report
- Save Current View
- Import
- Edit
- Copy
- Delete
- Spread Evenly
- Clear

Submission Performance Plan

Performance plans contain programmatic measurable items used to define the success of the overall grant award. The performance plan consists of goals and overarching strategies that link goals together. Goals can be created by Organizational Administrators, Department Admin, and Grant Managers.

The Performance Plan list shows the *Name*, *Goal Type*, *Responsible Individual*, and *Strategy* columns by default. In addition, the following columns may be shown: *Status*, *Created By*, *Created Date*, *Modified By*, and *Modified Date*. Each of these columns may be shown or hidden, sorted, or filtered. See the [AmpliFund User Interface Navigation Guide](#) to learn more.

Goals

Goals are measurable activities planned to ensure grant deliverables are met on the award’s timeline. Each goal may have a name, description, and Responsible Individual. AmpliFund has six types of goals.

Milestone Goal

Milestone goals are the most basic goal type. They allow for tracking progress as a “Yes” or “No” response by the Responsible Individual. An example of a milestone goal is “Create and send Q1 Staff Survey.”

Narrative Goal

Narrative goals are question and answer goals. Responsible Individuals may answer the question posed by the goal. An example of a narrative goal is “How successful was the grant-related activity this period?”

Numeric Goal

Numeric goals are a discrete number to achieve. As units of the goal are completed, Responsible Individuals may record units completed. An example of a numeric goal is “number of program participants” with a goal target of 50.

Percent Achieved Goal

Percent achieved goals are goals to reach a desired percent. When tracking progress against a percent achieved goal, Responsible Individuals may capture Total Possible and Total Achieved percentages. An example of a percent achieved goal is “Volunteer Retention Rate” with a goal target of 70%.

Percent Change Goal

Percent change goals are goals to track a percent increase or decrease. Percent change goals are defined with a starting percent and a desired percent. When tracking progress against a percent change goal, Responsible Individuals may capture Total Possible and Total Achieved percentages. An example of a percent change goal is “Decrease in Student Absences” with a starting absentee rate of 10%, and a goal absentee rate of 3%.

Reimbursement Goal Reimbursement goals are goals with a discrete unit to achieve, and a dollar rate associated per unit. When tracking progress against a reimbursement goal, Responsible Individuals may enter Units Achieved. If the goal is added as a budget item, the reimbursement goal will appear as part of the grant's expense budget. If a reimbursement goal is shown on the grant budget, any updates made to the goal through the performance plan will automatically update the budget. An example of a Reimbursement goal is "Number of Patient Screenings" with target/maximum units of 100, and a reimbursement rate per unit of \$22. Reimbursement goals are used to support pay for performance grants.

How To Add a Goal

When creating a new goal, the fields may vary depending on the goal type.

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award tab>Submission Performance Plan**.
4. Click the **+ (Create icon)** in the *Icon Bar*.
5. In the pop-up window, select a **Strategy** (optional). This will link the goal to an existing strategy.
6. Select a **Goal Type**. This could be [Milestone](#), [Narrative](#), [Numeric](#), [Percent Achieved](#), [Percent Changed](#), or [Reimbursement](#).
7. Add the goal information.
8. Click **Save**.

How To Add a **Milestone** Goal

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award tab>Submission Performance Plan**.
4. Click the **+ (Create icon)** in the *Icon Bar*.
5. In the pop-up window, select a **Strategy** (optional). This will link the goal to an existing strategy.
6. In the *Goal Type* dropdown, select **Milestone**.
7. Add the goal **Name**.
8. Add the goal **Description** (optional).
9. Select the **Responsible Individual**. This list pulls from *Contacts>Staff*. The Responsible Individual can add achievements to the goal and is assigned system-generated tasks related to the goal.
10. Select a goal **Due Date**.
11. Click **Save**.

How To Add a **Narrative** Goal

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award tab>Submission Performance Plan**.
4. Click the **+ (Create icon)** in the *Icon Bar*.
5. In the pop-up window, select a **Strategy** (optional). This will link the goal to an existing strategy.
6. In the *Goal Type* dropdown, select **Narrative**.
7. Add the goal **Name**.
8. Add the goal **Description** (optional).
9. Select the **Responsible Individual**. This list pulls from *Contacts>Staff*. The Responsible Individual can add achievements to the goal and is assigned system-generated tasks related to the goal.
10. Add the **Question** that the goal will answer.
11. Click **Save**.

How To Add a **Numeric** Goal

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award tab>Submission Performance Plan**.
4. Click the **+ (Create icon)** in the *Icon Bar*.
5. In the pop-up window, select a **Strategy** (optional). This will link the goal to an existing strategy.
6. In the *Goal Type* dropdown, select **Numeric**.
7. Add the goal **Name**.
8. Add the goal **Description** (optional).
9. Select the **Responsible Individual**. This list pulls from *Contacts>Staff*. The Responsible Individual can add achievements to the goal and is assigned system-generated tasks related to the goal.
10. Add the **Number To Be Achieved**.
11. Click **Save**.

How To Add a **Percent Achieved** Goal

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award tab>Submission Performance Plan**.
4. Click the **+ (Create icon)** in the *Icon Bar*.

5. In the pop-up window, select a **Strategy** (optional). This will link the goal to an existing strategy.
6. In the *Goal Type* dropdown, select **Percent Achieved**.
7. Add the goal **Name**.
8. Add the goal **Description** (optional).
9. Select the **Responsible Individual**. This list pulls from *Contacts>Staff*. The Responsible Individual can add achievements to the goal and is assigned system-generated tasks related to the goal.
10. Add the **Percent Desired**.
11. Click **Save**.

How To Add a **Percent Changed** Goal

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award tab>Submission Performance Plan**.
4. Click the **+ (Create icon)** in the *Icon Bar*.
5. In the pop-up window, select a **Strategy** (optional). This will link the goal to an existing strategy.
6. In the *Goal Type* dropdown, select **Percent Changed**.
7. Add the goal **Name**.
8. Add the goal **Description** (optional).
9. Select the **Responsible Individual**. This list pulls from *Contacts>Staff*. The Responsible Individual can add achievements to the goal and is assigned system-generated tasks related to the goal.
10. Add the **Current Percent** and **Percent Desired**.
11. Click **Save**.

How To Add a **Reimbursement** Goal

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award tab>Submission Performance Plan**.
4. Click the **+ (Create icon)** in the *Icon Bar*.
5. In the pop-up window, select a **Strategy** (optional). This will link the goal to an existing strategy.
6. In the *Goal Type* dropdown, select **Reimbursement**.
7. Check the **Add as Budget Line Item checkbox** to add the goal to the grant's expense budget.
8. Add the goal **Name**.


Note

If selected, any changes to the goal will be automatically reflected in the grant's budget



9. Add the goal **Description** (optional).
10. Select the **Responsible Individual**. This list pulls from *Contacts>Staff*. The Responsible Individual can add achievements to the goal and is assigned system-generated tasks related to the goal.
11. Add the **Rate Per Achievement** in dollars.
12. Add the **Number To Be Achieved**.
13. Click **Save**.

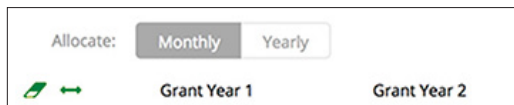
How To Add Allocations to a Goal

Narrative, Numeric, Percent Achieved, Percent Changed, and Reimbursement goals allow you to add allocations. Allocations help you plan your goals by year or month.

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award tab>Submission Performance Plan**.
4. Click the  (**Edit icon**) next to a goal name.
5. In the pop-up window, open the **Allocations tab**.




6. Select if you wish to view your allocations **Yearly** or **Monthly**.
7. Add **allocation amounts**. Click the  (**Clear icon**) to remove all selections. Click the  (**Spread Evenly icon**) to spread amounts equally over the grant's months.



8. Click **Save**.

How To Add an Attachment to a Goal

All goals allow you to add an attachment.

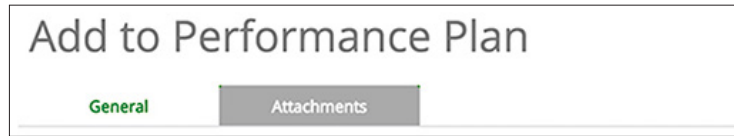
1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award tab>Submission Performance Plan**.
4. Click the  (**Edit icon**) next to a goal name.



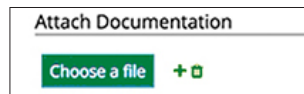
Note

Numeric goals will spread whole numbers; any remainder will be added to the last month.

- In the pop-up window, open the **Attachments tab**.



- Click **Choose a file** to select a file from your computer.
- Click the **+ (Add icon)** to add additional files (optional).




- Click **Save**.

Note

Once a goal has been created with a specific goal type selected, the goal type cannot be changed.


How To Edit a Goal

- Open **Grant Management > Grants > All Grants**.
- Click a **grant name**.
- Open the **Pre-Award tab > Submission Performance Plan**.
- Click the ** (Edit icon)** next to a goal name.



- Update the information as necessary.
- Click **Save**.

How To Copy a Goal

- Open **Grant Management > Grants > All Grants**.
- Click a **grant name**.
- Open the **Pre-Award tab > Submission Performance Plan**.
- Click the ** (Copy icon)** next to a goal name.



- Update the information as necessary.
- Click **Save**.

How To Delete a Goal

- Open **Grant Management > Grants > All Grants**.
- Click a **grant name**.
- Open the **Pre-Award tab > Submission Performance Plan**.

- Click the  (**Delete icon**) next to a goal name.




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

How To Import Goals

Note


The Individual name must **exactly match** what is in *Contacts>Staff*.

Users can import multiple goals using the [Performance Plan Import Template](#) (recommended) or their own Excel file. The Performance Plan Import Template includes the Grant, Goal Unique ID, Goal Type*, Name*, Description, Individual*, Question, Number To Be Achieved, Current Percentage, Desired Percentage, Rate Per Unit, Due Date, and Add as Budget Line Item fields. Required fields have asterisks (*) next to their names.

- Open **Grant Management>Grants>All Grants**.
- Click a **grant name**.
- Open the **Pre-Award Tab>Submission Performance Plan**.
- Click the  (**Import icon**) in the *Icon Bar*.
- In the pop-up window, click **Choose a file** to select a file from your computer.
- Select the **Destination** field for each Source column. If you are using the [Performance Plan Import Template](#) (recommended), the source and destination fields should match.
- Click **Import**.





How To Import Performance Plans

Users can import multiple performance plans using the [Performance Plan Import Template](#) (recommended) or their own Excel file. The Performance Plan Import Template includes the Grant, Goal Unique ID, Goal Type*, Name*, Description, Individual*, Question, Number To Be Achieved, Current Percentage, Desired Percentage, Rate Per Unit, Due Date, and Add as Budget Line Item fields. Required fields have asterisks (*) next to their names.

- Open **Grant Management>Grants>All Grants**.
- Click the  (**Import icon**) in the *Icon Bar*.
- In the pop-up window, select **Performance Plan Import** from the *Choose Import* dropdown.
- In the *Award Type* dropdown, select **Pre-Award**.
- Select to *Identify Grant by* grant **ID** or **Unique Identifier**.
- In the pop-up window, click **Choose a file** to select a file from your computer.

7. Select the **Destination** field for each Source column. If you are using the [Performance Plan Import Template](#) (recommended), the source and destination fields should match.
8. Click **Import**.

Icons


	Print
	Help
	Edit
	Delete

Submission Budget Settings

Submission Budget Settings defines a grant's default match and indirect cost rate, budget categories, and benefit types. The budget settings should be configured before adding budget categories or line items. Organizational Administrators, Department Admin, and the Grant Manager can set a default match amount or rate and indirect cost rate for the grant, and add budget categories and benefit types. In addition, budget settings can be set on the category or line item.

How To Configure Match Settings

You can configure default match settings for the budget for cash match and in-kind match. These can also be set on the category or line item.

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award tab>Submission Budget Settings**.
4. Click the  (**Edit icon**) in the *Icon Bar*.



5. In the *Matching* section, select the **Match** requirements.
 - **Disable:** match will not be tracked on budget categories or line items
 - **Enable:** match may be tracked on budget categories or line items
 - **Require:** cash match will always be tracked on budget categories and line items
6. Select **Use Match Percentage As**.
 - **Percentage of Total Grant Budget:** calculates match as percent of total budget
 - **Percentage of Grant-Funded Amount:** calculates match as percent of grant-funded amount only
7. Select **Default Cash Match**.
 - a. If *Percentage* is selected, add the **Cash Match Percent** (in decimal format).
 - b. If *Amount* is selected, add the **Cash Match Amount**.
8. Select **Default In-Kind Match Personnel** for personnel line items.
 - a. If *Percentage* is selected, add the **Cash Match Percent** (in decimal format).
 - b. If *Amount* is selected, add the **Cash Match Amount**.

9. Select **Default In-Kind Match Non-Personnel** for non-personnel line items.
 - a. If *Percentage* is selected, add the **Cash Match Percent** (in decimal format).
 - b. If *Amount* is selected, add the **Cash Match Amount**.
10. Click **Save**.

How To Configure Indirect Cost Rate Settings

You can configure default indirect cost rate for the budget as well as a cap value to ensure that planned spending does not exceed the allowable amount of indirect costs. These can also be set on the category or line item. If configured, an indirect cost category will appear in the grant's Expense Budget.

1. Open **Grant Management > Grants > All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award tab > Submission Budget Settings**.
4. Click the (**Edit icon**) in the *Icon Bar*.
5. In the *Indirect Cost Rate* section, select if you would like to **Track Indirect Cost Rate**.

Indirect Cost Rate

Track Indirect Cost Rate

6. Check the **Cap Indirect at __ Amount of Total Awarded Amount checkbox** to prevent indirect cost from exceeding the capped amount.
 - a. If checked, add **indirect cap amount** in dollars or percentage.

Cap Indirect at __ amount of Total Awarded Amount

7. Select a **Rate Type**.
8. Add the **Indirect Rate** (in decimal format).
9. Select the **Start Date** and **End Date**.
10. Click the **+ (Add icon)** to add additional indirect cost rates.

Rate Type	Indirect Rate	Start Date	End Date
Provisional	7.00000000 %	10/06/2015	10/06/2016

11. Click **Save**.

How To Add Budget Categories

Once a budget category has been added on the Submission Budget Settings page, it can be added on the grant's submission budget. Budget categories can include Federal and custom categories. Federal budget categories are pre-defined and cannot be edited. Custom categories can be added in *Administration>Lists>Budget Categories* or can be created while adding categories to the expense budget.

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award tab>Submission Budget Settings**.
4. Click the (**Edit icon**) in the *Icon Bar*.
5. In the *Categories* section, select **Budget Categories**. This list pulls from *Administration>Lists>Budget Categories*.
6. Click **Add**.

7. Click **Save**.












How To Add a Benefit Type

Once a benefit type has been added on the Submission Budget Settings page, it can be added as a personnel line item or a standalone line item.

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award tab>Submission Budget Settings**.
4. Click the (**Edit icon**) in the *Icon Bar*.
5. In the *Benefits* section, select how to **Add Benefits By**.
 - **Personnel:** benefit expenses are tracked per employee and will use staff compensation history settings on personnel line items
 - **Benefit Type:** benefit expenses are tracked as a collective expense for all grant-funded positions
6. Select a **Supported Benefit Type**. This list pulls from *Administration>Lists>Benefit Types*.
7. Click **Add**.

8. Click **Save**.

Icons

-  Print
-  Help
-  Submission Budget Report
-  Import
-  Add
-  Delete
-  Edit
-  Amendments
-  Locked
-  Spread Evenly
-  Clear

Submission Budget

Submission budgets contain budgeted items that define the planned spend down of the overall grant award. They can be created and edited by Organizational Administrators, Department Admin, and the Grant Manager. Submission Budgets are comprised of the Expense Budget and the Revenue Budget.

The Expense Budget contains all planned expense items within a grant budget, including budget categories; personnel, non-personnel, and benefit type line items; and if applicable, planned match expenses.

The Revenue Budget contains all planned grant revenue, including grant funding and match.


Budgets show the budget categories, grant-funded amounts, match amounts, total costs, and total revenue by default. Additionally, the grant years, line items, and Responsible Individuals can be shown or hidden.

How To Add a Category to the Expense Budget

Budget categories can be selected on the [Submission Budget Settings](#) page (*Pre-Award tab > Submission Budget Settings*). Budget categories can include Federal and custom categories. Federal budget categories are pre-defined and cannot be edited.

1. Open **Grant Management > Grants > All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award tab > Submission Budget**.
4. Click the **+ (Add icon)** next to *Expense Budget*.



5. In the pop-up window, select a **Category** in the *Category Details* section. This list pulls from the categories created in *Pre-Award tab > Submission Budget Settings*.
 - a. If the budget category is not available in the *Category* dropdown, click the **Add New Category to Budget link**.
 - b. On the Submission Budget Settings page, click the  (**Edit icon**) in the *Icon Bar*.

Categories

- c. In the *Budget Categories* dropdown, select a **category**. This list pulls

Note

Line items within the budget category will inherit its settings.

The indirect and match settings must be configured in Submission Budget Settings in order for category values to calculate.

from *Administration>Lists>Budget Categories*.

- d. Click **Add**.

- e. Click **Save**.
- f. Open the **Pre-Award tab>Submission Budget**.
- g. Click the **+ (Add icon)** next to *Expense Budget*.
- h. In the pop-up window, select the **Category** in the *Category Details* section.
6. Enter the **Budgeted Amount** for the category. The sum of the line items within this budget category cannot exceed this amount.
7. Select the **Indirect Cost** requirements for all line items within the category.
- **Disable:** indirect cost will not be tracked within the budget category
 - **Enable:** indirect cost may be tracked within the budget category on a per line item basis
 - **Require:** indirect cost will always be tracked within the budget category
8. Select the **Cash Match** requirements for all line items within the category.
- **Disable:** cash match will not be tracked within the budget category
 - **Enable:** cash match may be tracked within the budget category on a per line item basis
 - **Require:** cash match will always be tracked within the budget category
9. Select the **In-Kind Match** requirements for all line items within the category.
- **Disable:** in-kind match will not be tracked within the budget category
 - **Enable:** in-kind match may be tracked within the budget category on a per line item basis
 - **Require:** in-kind match will always be tracked within the budget category

Change Restrictions

10. Add the category **Expense Cap** (optional). This will prevent expenses within a category from exceeding the capped amount.

11. Check the **Do not allow expenses to exceed checkbox** as necessary. If selected, expenses cannot be imported or added over the cap amount.

Spending Alerts

12. Check the **Per Tracking Period checkbox** to add spending alerts for tracking periods. Spending alerts will notify the Grant Manager if a budget category is under or over allocated to line items for a tracking period.
 - a. If selected, add **Under Budget amount** in dollars or percentage (optional).
 - b. Add **Over Budget amount** in dollars or percentage (optional).
 - c. Click the **+ (Add icon)** to create additional alerts.

13. Check the **Life of Grant checkbox** to add spending alerts for the life of the grant. Spending alerts will notify the Grant Manager if a budget category within of a designated percentage of the total category budget.
 - a. If selected, add **percentage** (in decimal format) in the *Within % of total budget* field (optional).
 - b. Click the **+ (Add icon)** to create additional alerts.


Note

Line items within a locked category can be edited. Locked categories may be unlocked by the Grant Manager, Department Admin, and Organizational Administrators.

14. Click **Lock** to prevent line items being added to the category or the category being edited (optional).

15. Click **Save** to save your changes.


How To Edit a Category on the Expense Budget

1. Open **Grant Management > Grants > All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award tab > Submission Budget**.
4. Click the  (**Edit icon**) next to a category name.



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


How To Delete a Category on the Expense Budget

1. Open **Grant Management > Grants > All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award tab > Submission Budget**.
4. Click the  (**Delete icon**) next to a category name.



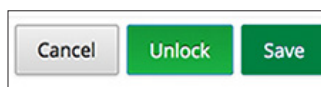
5. In the confirmation pop-up window, click **Delete**.

How To Unlock a Category on the Expense Budget

1. Open **Grant Management > Grants > All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award tab > Submission Budget**.
4. Click the  (**Edit icon**) next to a locked category's name.



5. In the pop-up window, click **Unlock**.



6. Click **Save**.

How To Add a Line Item

Budget line items are the planned expenses related to a grant and contain information such as associated GL accounts, responsible individuals, and attachments. Line items can be within a category or uncategorized.

There are three line items types: Personnel, Non-Personnel, and Benefit Type line items. Personnel line items are budgeted staff compensation expenses. Non-personnel line items are budgeted expenses that do not fund staff compensation. Benefit Type line items are planned benefit expenses for all grant-funded staff. Benefit Type line items are only available if benefits are not tracked within personnel line items in the [Budget Settings](#).

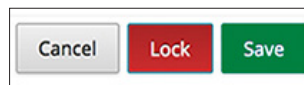
Note

Line items within a locked category can be edited. Locked categories may be unlocked by the Grant Manager, Department Admin, and Organizational Administrators.

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award tab>Submission Budget**.
4. Click the **+ (Add icon)** next to a budget category.



5. In the *General tab* of the pop-up window, select the **Item Type**. This can be **Personnel**, **Non-Personnel**, or **Benefit Type**.
6. Add line item information.
7. Click **Lock** to prevent line items being added to the category or the category being edited (optional).



8. Click **Create**.

How To Add a **Personnel** Line Item

Personnel line items are budgeted staff compensation expenses. For more information about compensation history, see the [AmpliFund Contact Management Guide](#).

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award tab>Submission Budget**.
4. Click the **+ (Add icon)** next to a budget category.
5. In the *General tab* of the pop-up window, select **Personnel** from the *Item Type* dropdown.
6. Select the **Category**.
7. Select the **Employee** name. This list pulls from *Contacts>Staff*.
 - a. If the employee is unknown, check the **Choose employee at later date checkbox**.
 - b. Add a line item **Name**.

8. Add the **Position** (optional).
9. Add the amount of funded **Salary**.
10. Add **Benefits** and **Direct Cost** (optional).

Note

If the employee has compensation history, the salary defaults to the compensation amount for the period. The *Designation to Awarded* and *Designation to Pending Grants* percentages show the percent of the salary already designated to other grants' personnel line items.

11. Check the **Exclude From Match checkbox** as necessary. This option will not be available if the category match requirements are set to *Disable* or *Require*.
12. Check the **Exclude From Indirect checkbox** as necessary. This option will not be available if the category indirect requirements are set to *Disable* or *Require*.
13. Check the **No Salary Data Used for Staff** as necessary.
 - a. If unchecked, add **Designation To This Grant percentage** (in decimal format) to update the *Salary* amount (optional).

No salary data used for staff

Designation To Awarded Grants: 0.00000000 %

Designation To Pending Grants: 0.00000000 %

Designation To This Grant: 80.00000000 %

14. Select the **Responsible Individual**. This list pulls from *Contacts>Staff*.
15. Add a **Description** (optional).
16. Click **Lock** to prevent line item from being edited (optional).

Cancel Lock Save

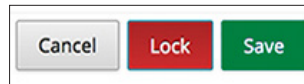
17. Click **Create**.

How To Add a **Non-Personnel** Line Item

Non-personnel line items are budgeted expenses that do not fund staff salary or staff benefits.

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award tab>Submission Budget**.
4. Click the **+ (Add icon)** next to a budget category.
5. In the *General tab* of the pop-up window, select **Non-Personnel** from the *Item Type* dropdown.
6. Add a line item **Name**.
7. Add the **Direct Cost**.
8. Check the **Exclude From Match checkbox** as necessary. This option will not be available if the category match requirements are set to *Disable* or *Require*.

9. Check the **Exclude From Indirect checkbox** as necessary. This option will not be available if the category indirect requirements are set to *Disable* or *Require*.
10. Select the **Responsible Individual**. This list pulls from *Contacts>Staff*.
11. Add a **Description** (optional).
12. Click **Lock** to prevent line item from being edited (optional).



13. Click **Create**.

How To Add a **Benefit Type** Line Item

Benefit Type line items are planned benefit expenses for all grant-funded staff.

Prerequisites: Benefit Types are added in the [Budget Settings](#) and benefit items are not budgeted per each grant-funded employee

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award tab>Submission Budget**.
4. Click the **+ (Add icon)** next to a budget category.
5. In the *General tab* of the pop-up window, select **Benefit Type** from the *Item Type* dropdown.
6. Select a **Benefit Type**.
7. Add the **Direct Cost**.
8. Check the **Exclude From Match checkbox** as necessary. This option will not be available if the category match requirements are set to *Disable* or *Require*.
9. Check the **Exclude From Indirect checkbox** as necessary. This option will not be available if the category indirect requirements are set to *Disable* or *Require*.
10. Select the **Responsible Individual**. This list pulls from *Contacts>Staff*.
11. Add a **Description** (optional).
12. Click **Lock** to prevent line item from being edited (optional).

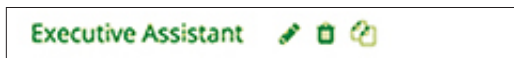


13. Click **Create**.

How To Add Financial Information to a Line Item

The *Financials tab* allows users to add more detail to the direct cost and matching planned amounts, and to associate GL accounts with the line item. Users may allocate line items across grant years or months. Line items are allocated evenly by month across the line item life unless unevenly spread.

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award tab>Submission Budget**.
4. Click the (**Edit icon**) next to a line item.



5. In the pop-up window, open the **Financials tab**.
6. Add the **Cash Match Amount** and **In-Kind Match Amount** in dollars or percentages.

Cash Match Amount	<input type="text" value="0.00000000 %"/>	Dollar	Percentage
In Kind Amount	<input type="text" value="0.00000000 %"/>	Dollar	Percentage

7. Select a **GL account**. This list pulls from *Administration>Lists>GL Accounts*.
8. Click **Add**. You can add multiple GL accounts if necessary.
9. Select if you wish to view your allocations **Yearly** or **Monthly**.
10. Add **allocation amounts**. Click the (**Clear icon**) to remove all selections. Click the **(Spread Evenly icon)** to spread amounts equally over the grant's months.



11. Click **Save**.

How To Add Benefits Information to a Personnel Line Item

Prerequisites: Must be a personnel line item where benefits are planned on a per-staff member basis. Benefit type must be added in the grant's budget settings.

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award tab>Submission Budget**.


- Click the  (**Edit icon**) next to a line item.

Executive Assistant   

- In the pop-up window, open the **Benefits tab**.
- Select the **Supported Benefit Type**. This list pulls from the *Pre-Award tab* > *Submission Budget Settings*.
- Click **Add**. You can add multiple benefit types if necessary.
- Add the benefit **Amount** in dollars or percentages.
- Check **Exclude From Match** and **Exclude From Indirect checkboxes** as necessary.
- Click **Save**.


How To Add an Expense Cap to a Line Item

Category and line item expense caps are independent of each other, and can be created on a per-line item basis.

- Open **Grant Management** > **Grants** > **All Grants**.
- Click a **grant name**.
- Open the **Pre-Award tab** > **Submission Budget**.
- Click the  (**Edit icon**) next to a line item.
- In the pop-up window, open the **Configuration tab**.
- Add the **Expense Cap**. This will prevent expenses within a category from exceeding the capped amount.
- Check the **Do not allow expenses to exceed checkbox** as necessary. If selected, expenses cannot be imported or added over the cap amount.
- Click **Save**.

How To Add Spending Alerts to a Line Item

Category and line item spending alerts are independent of each other, and can be created on a per-line item basis. Spending alerts will notify the Grant Manager if a line item is under- or overspent for a tracking period or throughout the life of the grant.

- Open **Grant Management** > **Grants** > **All Grants**.
- Click a **grant name**.
- Open the **Pre-Award tab** > **Submission Budget**.
- Click the  (**Edit icon**) next to a line item.
- In the pop-up window, open the **Configuration tab**.

Spending Alerts

6. Check the **Per Tracking Period checkbox** to add spending alerts for tracking periods. Spending alerts will notify the Grant Manager if a line item is under- or overspent for a tracking period.
 - a. If selected, add **Under Budget amount** in dollars or percentage (optional).
 - b. Add **Over Budget amount** in dollars or percentage (optional).
 - c. Click the **+ (Add icon)** to create additional alerts.

Under Budget	<input type="text" value="\$0.00"/>	Dollar	Percentage	+
Over Budget	<input type="text" value="\$0.00"/>	Dollar	Percentage	+

7. Check the **Life of Grant checkbox** to add spending alerts for the life of the grant. Spending alerts will notify the Grant Manager if a line item is within of a designated percentage of the total line item budget.
 - a. If selected, add **percentage** (in decimal format) in the *Within % of total budget* field (optional).
 - b. Click the **+ (Add icon)** to create additional alerts.

Within % of total budget	<input type="text" value="0.00000000 %"/>	+
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8. Click **Save** to save your changes.


How To Add an Attachment to a Line Item

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award tab>Submission Budget**.
4. Click the **✎ (Edit icon)** next to a line item.
5. In the pop-up window, open the **Attachments tab**.
6. Click **Choose a File** to select a file from your computer.
7. Click the **+ (Add icon)** to add additional attachments as needed.
8. Click **Save**.

How To Unlock a Line Item

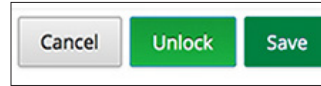
Prerequisite: Must be Organizational Administrator, Department Admin, or Grant Manager

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.

3. Open the **Pre-Award tab>Submission Budget**.
4. Click the  (**Edit icon**) next to a locked line item.




5. In the pop-up window, click **Unlock**.



6. Click **Save**.


How To Edit a Line Item

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award tab>Submission Budget**.
4. Click the  (**Edit icon**) next to a line item.



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

How To Delete a Line Item

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award tab>Submission Budget**.
4. Click the  (**Delete icon**) next to a line item.



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

How To Import Line Items


Organizational Administrators and Grant Managers can import multiple budget line items using the **Budget Import Template** (recommended) or their own Excel file. The Budget Import Template includes the Grant ID, Line Item Type*, Budget Category*, Benefit Type, Name*, Description, GL Account ID, GL Name, GL Code, Class 1, Class 2, Class 3, Responsible Staff*, Direct Cost*, Project Line Item, Exclude From Match, Exclude From Indirect, Cash Match Value, Cash Match Type, In-Kind Match Value, In-Kind Match Type, Personnel Staff, and Personnel Title fields. Required fields have asterisks (*) next to their names.

Note

The GL Code, GL Name, GL Class 1, and GL Class 2 must **exactly match** what is in *Administration>Lists>GL Accounts*. If you have defined your GL Accounts, you must ensure that the column headers and number of columns match what you have defined in *Administration>License Information>Settings tab*. The Responsible Staff and Personnel Staff names must **exactly match** what is in *Contacts>Staff*.


Note

The GL Code, GL Name, GL Class 1, and GL Class 2 must **exactly match** what is in *Administration>Lists>GL Accounts*. If you have defined your GL Accounts, you must ensure that the column headers and number of columns match what you have defined in *Administration>License Information>Settings tab*. The Responsible Staff and Personnel Staff names must **exactly match** what is in *Contacts>Staff*.

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Pre-Award Tab>Submission Budget**.
4. Click the  (**Import icon**) in the *Icon Bar*.
5. In the pop-up window, click **Choose a file** to select a file from your computer.
6. Select the **Destination** field for each Source column. If you are using the [Budget Import Template](#) (recommended), the source and destination fields should match.
7. Click **Import**.

How To Import Budgets




Organizational Administrators can import multiple budgets using the [Budget Import Template](#) (recommended) or their own Excel file. The Budget Import Template includes the Grant ID, Line Item Type*, Budget Category*, Benefit Type, Name*, Description, GL Account ID, GL Name, GL Code, Class 1, Class 2, Class 3, Responsible Staff*, Direct Cost*, Project Line Item, Exclude From Match, Exclude From Indirect, Cash Match Value, Cash Match Type, In-Kind Match Value, In-Kind Match Type, Personnel Staff, and Personnel Title fields. Required fields have asterisks (*) next to their names.

1. Open **Grant Management>Grants>All Grants**.
2. Click the  (**Import icon**) in the *Icon Bar*.
3. In the pop-up window, select **Budget Import** from the *Choose Import* dropdown.
4. In the *Award Type* dropdown, select **Pre-Award**.
5. Select to *Identify Grant by grant ID* or **Unique Identifier**.
6. In the pop-up window, click **Choose a file** to select a file from your computer.
7. Select the **Destination** field for each Source column. If you are using the [Budget Import Template](#) (recommended), the source and destination fields should match.
8. Click **Import**.

Grant Tools

The *Tools tab* allows users to create and send email messages, create and assign tasks, add documents, and create notes attached to the grant record.

Icons

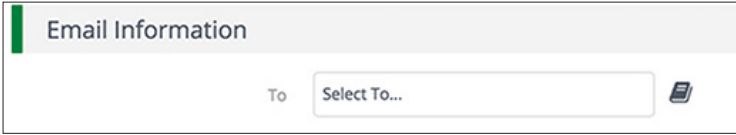
-  Print
-  Help
-  Create

Email Manager

From the Email Manager, users may create and send emails that will be connected to the record. The emails will be sent to the recipients' primary email addresses and will also appear in *Activity>Message Center*.

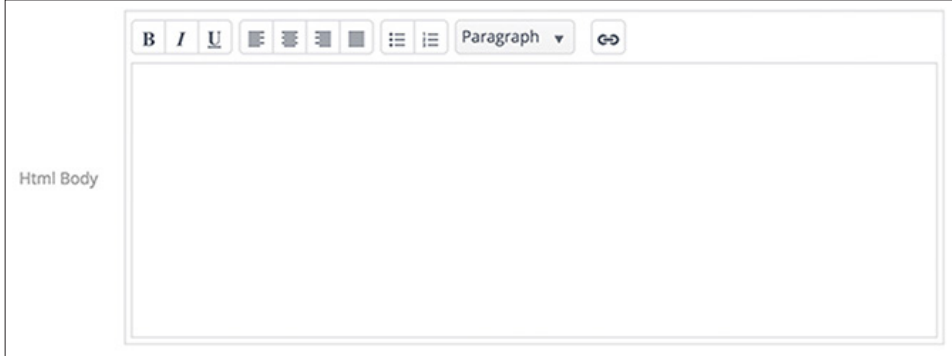
How To Create an Email

1. Open an **object record**.
2. Open the **Tools tab>Email Manager**.
3. Click the **+** (**Create icon**) in the *Icon Bar*.
4. In the *To* field, select the **email recipient**. This list pulls from *Contacts>Individuals* and *Contacts>Staff*.



The screenshot shows a form titled "Email Information". Below the title is a "To" field with a dropdown menu labeled "Select To..." and a small icon of a document with a checkmark to its right.

5. In the *CC* and *BCC* fields, select **additional recipients** (optional). These lists pull from *Contacts>Individuals* and *Contacts>Staff*.
6. Add the message **Subject**.
7. In the *Html Body* field, add the **email message**.



The screenshot shows a rich text editor for the "Html Body" field. The toolbar includes buttons for Bold (B), Italic (I), Underline (U), Bulleted List, Numbered List, Indent, Outdent, Paragraph, and a Refresh icon. The main area is a large empty text box.

8. Click **Select files...** to add a file from your computer (optional).
9. In the *Attachments* dropdown, select files from the *Documents* module to attach (optional).



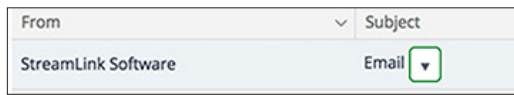
The screenshot shows an "Attachments" dropdown menu with "Public" selected and a downward arrow to the right.

10. Click **Send**.

How To View an Email







1. Open an **object record**.

2. Open the **Tools tab** > **Email Manager**.
3. Hover over an **subject name** to show the dropdown menu arrow.



4. Click the **dropdown arrow**.
5. Select **View**.

Icons

-  Print
-  Help
-  Create
-  Edit
-  Delete
-  Mark as Complete

Tasks

From the *Tasks* list, Organizational Administrators, Department Admin, and Object Managers can create and assign tasks to other staff that will be connected to the object record. Once created, tasks will appear on that staff's AmpliFund calendar, and they will receive email reminders related to that task.

How To View a Task

1. Open an **object record**.
2. Open the **Tools tab>Tasks**.
3. Click a **task name**.


Note

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

How To Add a Task

1. Open an **object record**.
2. Open the **Tools tab>Tasks**.
3. Click the **+ (Create icon)** in the *Icon Bar*.
4. Add the task **Name**.
5. Select the **Task Type**.
6. Add the task **Description** (optional).
7. Select the **Task Status**.
8. Select the **Responsible Individual**. This list pulls from *Contacts>Staff*.
9. Select **Additional Recipients** (optional). This list pulls from *Contacts>Staff*. Additional Recipients will receive email reminders and can view the task in *Activity>Tasks*. They can also mark the task as complete.
10. Select a **Due Date**.
11. Select the **Task Reminders**. These reminders will schedule emails to the Responsible Individual and Additional Recipients about the task. Staff will not receive reminders once the task is marked complete.
12. Click **Save**.


How To Edit a Task

1. Open an **object record**.
2. Open the **Tools tab>Tasks**.
3. Click the  (**Edit icon**) next to a task name.



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

How To Delete a Task

1. Open an **object record**.
2. Open the **Tools tab>Tasks**.
3. Click the  (**Delete icon**) next to a task name.



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




How To Mark a Task as Complete

1. Open an **object record**.
2. Open the **Tools tab>Tasks**.
3. Click the (**Mark as Complete icon**) next to a task name.



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

Icons

-  Print
-  Help
-  Create

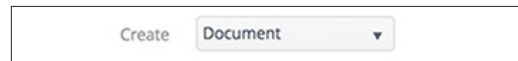
Documents

Within Documents, users can upload and view object-specific files and folders. Once an object record has been created, AmpliFund automatically creates an record folder that is accessible from the object record or from the *Documents* module.

To learn more about document management, see the [AmpliFund Document Management Guide](#).

How To Upload a Document

1. Open an **object record**.
2. Open the **Tools tab>Documents**.
3. Click the **+ (Create icon)** in the *Icon Bar*.
4. In the *Create* dropdown menu, select **Document**.








5. In the *In Folder* dropdown menu, select a parent folder. This will be the destination folder for the document. This will default to the grant folder.
6. Click **Select Files...** to upload a file from your computer.
7. Click **Create**.

How To View a Document

1. Open an **object record**.
2. Open the **Tools tab>Documents**.
3. Click a **parent folder name** if necessary.
4. Click a **document name**.

Icons

-  Print
-  Help
-  Create
-  Edit
-  Delete

Note

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

Notes

Additional information related to the grant may be stored as a Note. Each note may include a title, note date, text, and an attachment.


How To Add a Note

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Tools tab>Notes**.
4. Click the **+** (**Create icon**) in the *Icon Bar*.
5. Add a **Title**.
6. Select a **Note Date** (optional).
7. Select a **Note Type** (optional). This list pulls from *Administration>Lists>Note Types*.
8. Add the note **Body**.
9. Click **Select files...** to upload a file from your computer (optional).
10. Click **Create**.

How To View a Note

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Tools tab>Notes**.
4. Click a **note title**.

How To Edit a Note

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Tools tab>Notes**.
4. Click the  (**Edit icon**) next to a note title.



5. Update the information as necessary.
6. Click **Update**.

How To Delete a Note

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.

3. Open the **Tools tab** > **Notes**.
4. Click the  (**Delete icon**) next to a note title.



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




Grant Workflow

For clients with the Workflow module

Grants may be enrolled in workflows to manage business processes, such as grant application approvals or report routing. Additionally, grant budgets and grant performance plans may be enrolled in workflows to manage specific budget and performance plan review processes.

To learn more about workflows, see the [AmpliFund Workflow Guide](#).

Icons

-  Print
-  Help
-  Create

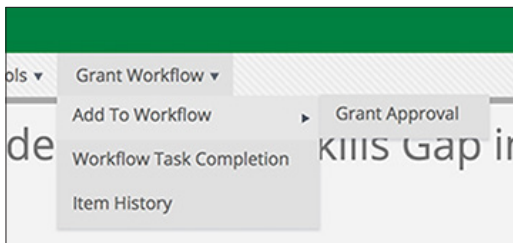
Add To Workflow

For clients with the Workflow module

Grants may be enrolled or added to workflow instances. A workflow instance is made up of workflow queues and actions. To learn more about workflows, see the [AmpliFund Workflow Guide](#).







How To Add a Grant to a Workflow Instance

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Grant Workflow tab>Add to Workflow**.
4. Select a **workflow instance** from the dropdown.



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

Icons

	Print
	Help
	Favorite
	Edit
	Copy
	Delete







Workflow Task Completion

The Workflow Task Completion list shows all grant workflow tasks and their status. To learn more about workflows, see the [AmpliFund Workflow Guide](#).

How To View a Workflow Task

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Grant Workflow tab>Workflow Task Completion**.
4. Click a **workflow name**.

Icons

	Print
	Help
	Save View
	Create
	Import
	Export

Item History

The Item History list shows the workflow history for the grant, including queues, actions, and users. To learn more about workflows, see the [AmpliFund Workflow Guide](#).

How To View a Workflow Action

1. Open **Grant Management>Grants>All Grants**.
2. Click a **grant name**.
3. Open the **Grant Workflow tab>Item History**.
4. Click a **workflow action name**.

Appendix

Grants Lists

All Grants	The All Grants list displays every enabled grant record visible to a user, regardless of the award status.
Pending Grants	The Pending Grants list displays all grant records with an award status of Pending.
Active Grants	The Active Grants list displays all grant records with an award status of Approved or Extended.
Denied Grants	The Denied Grants list displays all grant records with an award status of Denied.
Cancelled Grants	The Cancelled Grants list displays all grant records with an award status of Cancelled.
Closed Grants	The Closed Grants list displays all grant records with an award status of Closed.
Completed Grants	The Completed Grants list displays all grant records with an award status of Completed.
Deleted/Disabled Grants	The Deleted/Disabled Grants list displays all grant records that have been deleted, or with a record status of Disabled.

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 Administrators	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 Administrators	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 Administrators	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.
Researchers	Researchers only have access to the <i>Research</i> * 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.