**Supplemental Video: Leveraging the All Grants Page**

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| Welcome to the AmpliFund training video focused on leveraging the “all grants page” to gain insight about your grant portfolio.  |
| Through your implementation process, you’ve entered master data and grant data into AmpliFund.  By regularly keeping your grant portfolio data updated in AmpliFund you can generate powerful insights.  Leveraging the data and results you have in AmpliFund your organization might identify how to expand your grant portfolio, use successful grant writers more often, mitigate risk by monitoring performance and budget progress, trend funders across time, and so much more!    |
| In this video we’ll show you how to leverage the “All Grants Page” which is just one tool in AmpliFund to gain insight into your grant performance.  Via the all grants page in AmpliFund, you can view your entire grant portfolio in one screen, filter/sort by key pieces of information and customize what information you want to review.  You can save your preferred views for later and share them internally.  Finally the data is exportable into Excel or CSV for use outside of AmpliFund.  Let’s log into AmpliFund and get started.  |
| When you log into AmpliFund, Click on Grant Management, click on Grants.  |
| Now you are on the All Grants Page!  This displays every grant you’ve entered into AmpliFund so far.  |
| On this page you’ll see some key information already available like the grant name, grantor and award status.  To add additional columns, click on any arrow, then click Columns and select which additional fields you want to add to the page.  I’m going to add department and subject to our page view.  |
| Now you can see those two fields on the all grants page.  If I want to move them to a different spot in the page view, I just click on the name and drag it to the spot in the column order that I want.  Let’s put department before close out date.  |
| The all grants page allows for so many options of how you can view your grant data.  If I click on the arrows next to any column, I can sort either ascending or descending.  Or I have the option to filter by words or phrases to reduce the list to just a specific set of grants.  |
| You might want to use the sorting features to look at the date columns and see your close out dates that are coming up or by your total awarded amount to see your largest or smallest grants.  For the filter you can quickly and easily find specific grantors, departments or subjects, just as some examples.  |
| Another great feature of this page is the ability to group grants together by a specific data point.  If I want to look at my grants by fiscal year received, I can drag that column title to the top and my data is grouped and sorted by that year.  |
| Add additional fields to the top section to group your data even further.  Like in this example where I added the award status to the top.  This functionality is powerful to be able to answer quick facts about your grant portfolio, like how many awards were we approved for last fiscal year?  Or which department has the most awarded grants?  Or what was the total amount of grant revenue we applied for but were denied so far this fiscal year?  |
| If you find a “view” of the data you like and want to easily revisit at a later time.  Click on the page icon in the top right icon tool bar.  This allows you to save the view and name it.  You can make it private, so only you can look at it, or by leaving that unchecked anyone in your organization can access this view.    |
| After you hit create, the view is saved.  You can access it via Grants>Views  |
| Next, let’s learn how to export grant data from your all grants page.  From the all grants page, hit the export icon in the top right icon toolbar.  |
| Here you have export options for what you’d like to export, the ability to enter a file name and ability to select either excel or CSV.  |
| Through this training you’ve learned how to leverage the all grants page of AmpliFund to gain insight on your grant portfolio.  Should you have any questions, please reference our support site.  Thank you!  |