**Script: Core Concept: Master Data Subjects and Departments**

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| Script  |
| Welcome to the AmpliFund Core Concept video focused on the Master data components of Subjects and Departments  |
| Master data is the starting point for building a robust grants management system within AmpliFund.  This data will be critical in setting up your grants, performance plans, budgets, and reporting.  |
| During this video we will focus on the process for manually entering subjects and departments.  There are import options available which are reviewed in another video on our support site.  We recommend manually entering at least a few of each type of master data component to familiarize yourself with AmpliFund.  |
| Let’s start with subjects.  Subjects are key words that can be tagged onto your grant.  Having a subject or subjects tagged on your grant allows for additional search features, filtering options.  Subjects are not required on a grant record but they can be valuable within AmpliFund.  Grants can have one or more subjects tagged on them.  |
| Are you wondering what you might use for a subject?  Here’s some ideas it could be STEM, fitness, healthy living, community, senior services, parks, and so much more.  A subject can be as narrow or broad as your organization would like.  Subjects can help provide your organization with powerful insight.  If you want to be able to share grant revenue, applications or denials by type; subjects are a great way to tag your grants then leverage the power of AmpliFund to easily extract that data.  |
| Next let’s talk about departments.  Departments play a key role in assigning security access and allowing you to filter or sort your grant portfolio by different areas.  Departments could be an internal area of your organization or programs, they could be partner organizations or other entities responsible for grants.  One or multiple departments can be assigned to a user or grant.  Departments are also key in security within AmpliFund, having a user in a department will dictate what grants or projects they have access to.  Finally, departments can be used to filter, sort and run reports within AmpliFund.  |
| There are a number of different ways you can use departments.  One could be creating departments that match segments of your organization like finance, legal, administration or operations.  Another way to use departments is to link entities that roll up together, like within a health system where you have numerous hospitals and doctors offices that are part of an IDN.  Another way could be segmenting by areas of focus within your organization, like in our third example where there are focuses on household pets, exotic animals and sea animals.    |
| Now that we know the basics about subjects and departments, lets dive into AmpliFund and build one of each!  After we log-in to AmpliFund we land on our calendar and to build a subject we’ll navigate to Administration and then Lists, then select Subjects.  |
| This would take me to a list of any subjects that have been entered.  To add a subject, click on the plus icon in the top right on the icon tool bar.  |
| As you can see the only required field is the name.  I’ve entered education and then I’ll click create.  This is another good area of the system to align internally on naming conventions.  Congratulations, you’ve just entered your first subject.  If you want to add any more subjects manually, you can click again on Administration> Lists> Subjects then the plus icon.  |
| Next let’s add a department.  To add a department click on Administration>System Security and then Departments. This would take me to a list of any departments that have been entered.  To add a department, click on the plus icon in the top right on the icon tool bar.  |
| As you can see from the entry screen, the only required field is the name of the department.  However, you could also add a description and, or a unique identifier.  I’ve entered Finance here and will then click create.  |
| After hitting create, I land back on my list of departments.  To edit a department you’ve created you can always click on the pencil icon.  |
| In a future Core Concept video we will create staff and users which can be assigned to departments.  To view the members of a department you would click on the name of the department and then Click on Members.  Right now there are no members of my department but we’ll add some in our next video.  |
| Through this video, you’ve learned how to enter subjects and departments.  For additional instructional documentation, please visit our support site.  Thank you!  |