**Core Concept: Master Data Departments and Budget Categories**

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| Welcome to the AmpliFund Core Concept video focused on the Master data components of Departments and Budget Categories.  |
| Master data is the starting point for building a robust grants management system within AmpliFund.  This data will be critical in setting up your funds, opportunities, budget templates, and scoring workflow responsibilities.  |
| During this video we will focus on the process for manually entering departments and budget categories.  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 departments.  Departments play a key role in assigning security access and allowing you to filter or sort your opportunity 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 opportunities.  One or multiple departments can be assigned to a user or an opportunity.  Departments are also key in security within AmpliFund, having a user in a department will dictate what opportunities or awards 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.    |
| Next, let’s talk about budget categories.  Budget categories are a mechanism to group together line items within a budget.  Budget categories are critical because you cannot build a budget template for an application within AmpliFund without these categories.  Each budget line item must be assigned to only one budget category.  AmpliFund has federal categories built into the system that you can use and/or you can also add custom categories.  Both the pre-built categories and custom categories function the same way.  |
| Let’s dive deeper into pre-loaded budget categories.  These are a pre-defined list that are available in AmpliFund.  Categories include: Construction, Consultants/Contracts, Equipment, Fringe Benefits, Personnel, Supplies and Travel.  |
| Next let’s talk about custom budget categories, these serve the same function as federal/pre-loaded budget categories, but you can enter your own list with any names you choose.  The only required data element is the name.  A few important reminders, there are no functional differences between the pre-loaded or custom categories and, every budget line item must have a category.   |
| Now that we know the basics about departments and budget categories, lets dive into AmpliFund and build one of each!  After we log-in to AmpliFund we land on our calendar and to build a department we’ll navigate to Administration and then System Security, then select Departments.  |
| 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.  |
| Lets add some budget categories.  To add budget categories, click on Administration>Lists> Budget Categories.  In this area you can see the predefined federal categories and can also add a custom category.  Remember either the pre-built or custom can be used on any budget and there’s no functional difference.  Let’s go ahead and add a custom category by clicking on the plus icon in the top right.  |
| A box will appear for you to type the name.  |
| Budget categories also require a double save, so click on the save icon then also click Save Changes at the bottom.  |
| Through this video, you’ve learned how to enter departments and budget categories.  For additional instructional documentation, please visit our support site.  Thank you!  |