**Core Concept: Master Data Staff and Users**

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| Welcome to the AmpliFund Core Concept video focused on the Master data components of Staff and Users.  |
| 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 staff and users.  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 do a quick comparison of the two master data components.  As you can see on this quick reference chart, there are a few key differences between staff and users.  Most notably, while staff can be assigned responsibility, they cannot log into AmpliFund.  Anyone who needs to log into AmplIFund should be a user  |
| Let’s learn a little more about staff.  Staff are people at your organization who need to be entered in the AmpliFund system as they may be responsible for tasks or workflow actions that happen outside of AmpliFund. The only required fields on a staff record are first name, last name, and email address.  There are a number of other informational fields you can capture in the system on a staff record, such as address, phone number and unique identifier.  Staff records are important in the AmpliFund system as they can be linked to organizations or individuals to track relationships.  Staff can receive emails from AmpliFund.  And finally, staff can be converted into AmpliFund users.  |
| Next, let’s talk about users.  Users are staff who may log into your AmpliFund account. The only required fields on a user record are first name, last name, email address and role.  There are a number of other informational fields you can capture in the system on a user record, such as address, phone number and unique identifier.  We’ll come back to the user role options shortly.  Similar to staff, users can be assigned responsibility for tasks, budget items and performance items.  Users have a security role which dictates their level of access to data within AmpliFund.  Users can be assigned within AmpliFund as an opportunity manager.  Finally, when you create a user, AmpliFund also automatically creates a staff record for that person.  |
| There are a few other important facts about users.  Once a user is created, which we’ll be showing shortly, they must be invited to the system by the organization administrator, which can occur one at a time or in bulk.  A users username is their email address listed on the user record, so careful attention to email addresses is recommended to create a seamless experience for your potential users.  Finally, users will set their own password via the invitation process.  Invitations are sent via email and the link expires in 72 hours.  You can resend invitation links as needed if a users link has expired.  In a separate training module, we review password settings you can create for your organization.  |
| Included in the grant maker core subscription are 3 security roles – the organizational admin, the executive role and a department user options.  You may see other roles in various areas of AmpliFund, if you have interest in expanding your subscription please reach out to your Implementation Team.  The organizational admin has full access to all areas of your subscription with AmpliFund.  The admin can create and edit all records within the system and can view all activity.  The executive role has access to the full system but may only view records, the executive role cannot edit anything within AmpliFund.  Finally, department users have access to view and edit within their assigned department only.  As we dive deeper into AmpliFund we will later review implicit security roles where you can assign a user to specific records only.  |
| Now that we are familiar with the concepts of staff and users, let’s jump into AmpliFund and create each one.  Upon logging into AmpliFund you will land on the calendar.  On the left navigation menu, select Contacts then staff.  We’ll start by entering a staff record.  |
| When you click on staff you would land on a list of any staff records in the system.  To add a staff record, click on the plus icon in the top right icon toolbar  |
| You are now on the staff record entry page.  To create a staff record, you must enter a first and last name and email address.  You will note that track time is also required but is defaulted to monthly.  That field does not apply to your current subscription so you can leave it as defaulted.  If you would like you can enter other information about your staff member.  Here I’ve entered a staff member of Addison Smith and her email.  Then I click create to create my staff record.  |
| After hitting create, I see the staff record details page.  If you need to edit your staff record, click on the pencil icon in the top right icon tool bar.  Congratulations! You’ve just added your first staff member to AmpliFund!  |
| Next, I’m going to create a user.  For users, you can either create a user from scratch or you can convert a staff record to a user.  Today we’ll create a new user from scratch, however, there is a supplemental video available on converting a staff record to a user.  To navigate to the user section, click on Administration in the left navigation menu, then click on the caret next to System Security, then select users.  |
| You will land on a list of any user records in the system.  To add a user record, click on the plus icon in the top right icon toolbar.  |
| You may notice the entry screen to create a user is a bit different than creating a staff record.  At the very top you have options for subscribing the user to emails – either daily or weekly which means the user would receive communication from AmpliFund either daily or weekly with their upcoming tasks or other required actions.  The research module is not applicable to your subscription so you may leave that blank.  There is a check box for the applicant portal, you should assign your users access to the applicant portal if they will be testing application forms or might be assisting your recipients in the portal.  The next field, which is required is the role.  Here is where you would select if the user is an organizational admin, executive or user.  As you scroll down, you should enter the users first and last name and email address.  Again in this entry screen time tracking is defaulted and you may leave it as noted.  Enter any additional information about your user that you’d like stored on the record and click create.  Here I’ve created Ryan Jones and entered her email address.  Ryan will be an organizational admin as her role.  |
| Congratulations!  You’ve just created a user!  But that user has not yet been invited to AmpliFund.  To invite a user to AmpliFund, click the mail icon next to the users name.  if you hover over the mail icon, it will show a tool tip of “send invitation”.  After you hit this icon the user will receive an email invitation to log in to AmpliFund.  As an organizational admin, on this screen you are able to see all users created, if they’ve been invited to AmpliFund and also if they’ve logged into the system.  |
| Let’s add one more user, a department user.  I’ll click the plus sign again and enter my user information.  When I select Department User (salary), you will see a new field appear where I can select which department this user is a part of.  I can select one or multiple departments to assign this user.  I’ll continue adding my information and then click Create.  |
| Through this video, you’ve learned how to enter staff and users.  For additional instructional documentation, please visit our support site.  Thank you!  |