AmpliFund

Project Management User Guide

Contents

Project Management Overview

The *Project Management* module allows users to manage grant funding by combining multiple grants, in part or in whole, into a single project. Each project has its own budget, performance strategies, and performance goals. Project budget line items and performance goals can be independent, or can be tied directly to grant line items and goals, respectively.

Icons

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

Projects

Projects can be comprised of multiple grants or parts of grants. Projects can also have their own budget line items and performance goals and strategies.

The Projects list shows the *Name, Project Manager, Budgeted Amount, Start Date, End Date*, and *Status* column by default. In addition, the following columns are available: *ID, Grants, Department(s) or Program(s), Subject(s), Created By, Created Date, Modified By, Modified Date,* and *Unique Identifier*. 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 filtering list views.

Project Security

Users will have visibility and editing permissions on projects based on their user security role. For more information on AmpliFund security roles, see **Security Roles**.

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.
Executive	Executives can view all records in the account, including Staff compensation information, but cannot add or edit any records.
Project Admin	Project Admin can create, view, and edit all project records. In addition, Project Admin can view all grants linked 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 are classified as Salary or No Salary. Project Users (No Salary) cannot create, view, or edit personnel line items on a grant's or project's budget.
Department Admin	Department Admin can create, view, and edit all project and grant 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 project and grant 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 or project's budget.

In addition to AmpliFund's user security roles, users can have additional security permissions per project, based on their affiliation to the project. Users can be selected as Project Managers or Additional Staff. These users will be able to view the project, regardless of their user type.

Project Managers

Project Managers have full access to edit project details, and create, edit, and delete all items related to their project. These users may also assign responsibility for goals and line items to other users.

Additional Staff

Additional Staff can view project details, performance plans, and budget plans. They cannot create, edit, or delete project details, goals, or line items.

Responsible Individuals

Responsible Individuals are responsible for overseeing a performance goal or line item's completion. They can only view their assigned goal or line item and their related achievements or expenses, respectively.

Note

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

How To Add a Project

Prerequisite: Must be an Organizational Admin, Project Admin, or Department Admin

1. Open **Project Management>Projects**.
2. Click the **+ (Create icon)** in the *Icon Bar*.

Project Information

3. Add the project **Name**.
4. Select the project **Start Date** and **End Date**.
5. Add the **Budgeted Amount** (optional).
6. Select a **Project Manager**. The Project Manager will have full access to edit project details, and create, edit, and delete all items related to the project. The Project Manager may also assign responsibility for goals and line items to other AmpliFund users. This list pulls from *Contacts>Staff*.
7. Select **Additional Staff** (optional). Additional Staff may view project details, performance plans, and budget plans. They cannot create, edit, or delete project details, and other project-related information. This list pulls from *Contacts>Staff*.
8. Select **Department(s) or Program(s)** (optional). This will link Department Admin and Users to the project. This list pulls from *Administration>System Security>Departments*.
9. Select **Subject(s)** (optional). This list pulls from *Administration>Lists>Subjects*.
10. Select **Grant(s)** (optional). This will link the project to the grant so that the project line items and performance goals will be available on the grant's line items and goals. This list pulls from *Grant Management>Grants*.

Description

11. Add a **Description** (optional).

Default Settings for Sending Task Reminders

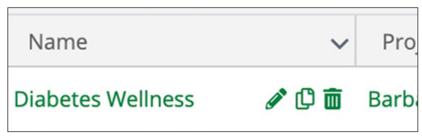
12. Select **Default Task Reminders** (optional).

Record Information

13. Add a **Unique Identifier** as an additional reference (optional).
14. Click **Create**.

How To Edit a Project

1. Open **Project Management>Projects**.
2. Click the **(Edit icon)** next to a project name.

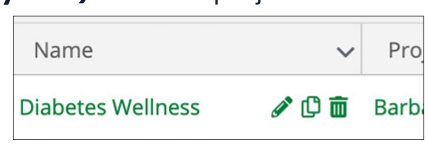


3. Update the information as necessary.
4. Click **Update**.

How To Copy a Project

Prerequisite: Must be an Organizational Admin, Project Admin, or Department Admin

1. Open **Project Management>Projects**.
2. Click the **(Copy icon)** next to a project name.



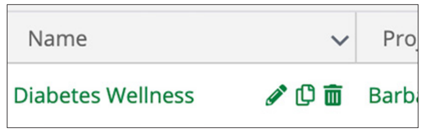
3. Update the information as necessary.
4. Click **Update**.

How To Delete a Project

Deleting a project removes the project from the Projects lists, but does not completely remove the record from AmpliFund. Once deleted, the project can be viewed by filtering the Projects list for deleted projects. To completely remove the project from AmpliFund, see **How To Purge a Project**.

Prerequisite: Must be an Organizational Admin, Project Admin, or Department Admin

1. Open **Project Management>Projects**.
2. Click the 🗑 **(Delete icon)** next to a project name.



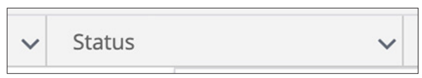
3. In the confirmation pop-up window, click **Delete**.

How To Purge a Project

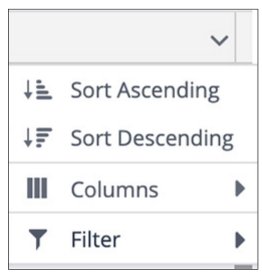
To permanently and completely remove the project from AmpliFund, it must be deleted and then purged.

Prerequisite: Must be an Organizational Administrator, Project Admin, or Department Admin

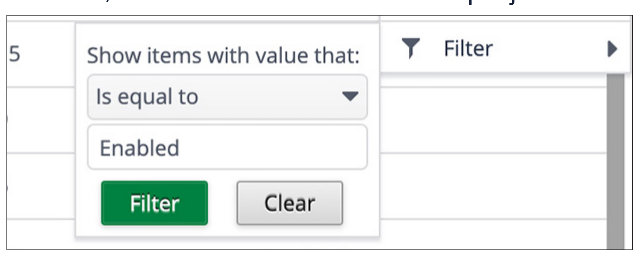
1. Open **Project Management>Projects**.
2. Click the ⌄ **(Menu icon)** in the *Status* column.



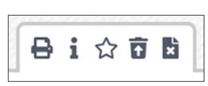
3. Hover over **Filter** to show filter menu.



4. In the filter menu, click **Clear** to show deleted projects.



5. Click a **deleted project name**.
6. Click the **(Purge icon)** in the *Icon Bar*.



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

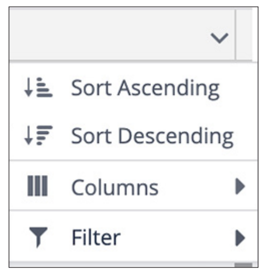
How To Restore a Project

Deleted projects can be restored. Once restored, the project will reappear in the Projects list.

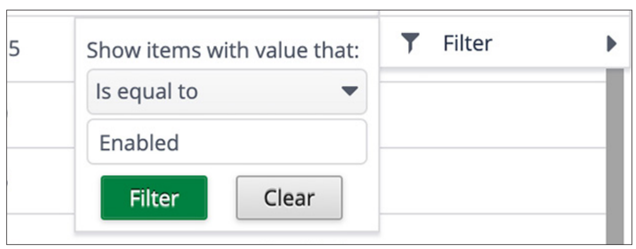
Prerequisite: Must be an Organizational Administrator, Project Admin, or Department Admin

1. Open **Project Management>Projects**.
2. Click the **(Menu icon)** in the *Status* column.

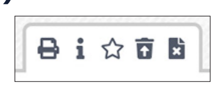
3. Hover over **Filter** to show filter menu.



4. In the filter menu, click **Clear** to show deleted projects.



5. Click a **deleted project name**.
6. Click the **(Restore icon)** in the *Icon Bar*.



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

Note

The Project Manager names must **exactly match** what is in the *Contacts* module and the Department(s) must **exactly match** what is in the *Administration* module.

How To Import Projects

Users can import multiple projects using the **Projects Import Template** (recommended) or their own Excel file. The Projects Import Template includes the Project ID, Name*, Start Date*, End Date*, Budgeted Amount*, Project Manager*, Departments, Description, and Unique Identifier fields. Required fields have asterisks (*) next to their names.

1. Open **Project Management>Projects**.
2. Click the **(Import icon)** in the *Icon Bar*.

3. In the pop-up window, click **Choose a file** to select a file from your computer.
4. Select the **Destination** field for each Source column. If you are using the Projects Import Template (recommended), the source and destination fields should match.
5. Click **Import**.

How to Export Projects

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

1. Open **Project Management>Projects**.
2. Click the **(Export icon)** in the *Icon Bar*.

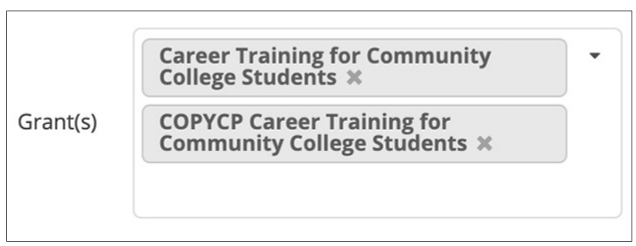
3. In the pop-up window, add a **File Name**.
4. Select the **Export File Type**.
5. Click **Export**.

How To Link a Grant to a Project

1. Open **Project Management>Projects**.
2. Click the **(Edit icon)** next to a project name.

Project Information

3. Select **Grant(s)**. This list pulls from *Grant Management>Grants*.



4. Click **Update**.

Icons

🖨	Print
ℹ	Help
🔖	Save Current View
+	Create
✎	Edit
⧉	Copy
🗑	Delete

Project Performance Planning

The *Planning tab* of a project allows users to build performance plans and budgets. Project performance plans allow project managers to define performance goals to meet with project-related activities. Performance strategies group goals together.

How To Add a Project Performance Goal

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

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

1. Open **Project Management>Projects**.
2. Click a **project name**.
3. Open the **Planning tab>Performance Goals**.
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 Project Performance **Milestone** Goal

1. Open **Project Management>Projects**.
2. Click a **project name**.
3. Open the **Planning tab>Performance Goals**.
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. Click **Create**.

How To Add a Project Performance **Narrative** Goal

1. Open **Project Management>Projects**.
2. Click a **project name**.
3. Open the **Planning tab>Performance Goals**.
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. 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.
9. Add the **Question** that the goal will answer.
10. Click **Create**.

How To Add a Project Performance **Numeric** Goal

1. Open **Project Management>Projects**.
2. Click a **project name**.
3. Open the **Planning tab>Performance Goals**.
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 **Create**.

How To Add a Project Performance **Percent Achieved** Goal

1. Open **Project Management>Projects**.
2. Click a **project name**.

3. Open the **Planning tab>Performance Goals**.
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 **Desired Percent**.
11. Click **Create**.

How To Add a Project Performance **Percent Changed** Goal

1. Open **Project Management>Projects**.
2. Click a **project name**.
3. Open the **Planning tab>Performance Goals**.
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 **Desired Percent**.
11. Click **Create**.

How To Add a Project Performance **Reimbursement** Goal

1. Open **Project Management>Projects**.
2. Click a **project name**.
3. Open the **Planning tab>Performance Goals**.
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.

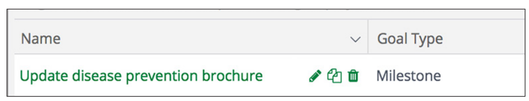
6. In the *Goal Type* dropdown, select **Reimbursement**.
7. Add the goal **Name**.
8. Add the goal **Description** (optional).
9. Select the **Responsible Individual**. This list pulls from *Contacts>Staff*. The Responsible Individual can add achievements to the goal and is assigned system-generated tasks related to the goal.
10. Add the **Rate Per Achievement** in dollars.
11. Add the **Number To Be Achieved**.
12. Click **Create**.

Note

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

How To Edit a Project Performance Goal

1. Open **Project Management>Projects**.
2. Click a **project name**.
3. Open the **Planning tab>Performance Goals**.
4. Click the ✎ **(Edit icon)** next to a goal name.



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

How To Copy a Project Performance Goal

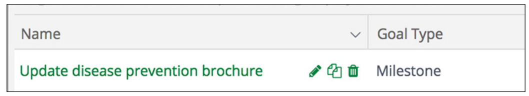
1. Open **Project Management>Projects**.
2. Click a **project name**.
3. Open the **Planning tab>Performance Goals**.
4. Click the **(Copy icon)** next to a goal name.

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

How To Delete a Project Performance Goal

1. Open **Project Management>Projects**.

2. Click a **project name**.
3. Open the **Planning tab>Performance Goals**.
4. Click the **(Delete icon)** next to a goal name.



Name	Goal Type
Update disease prevention brochure	Milestone

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

How To Add a Project Performance Strategy

1. Open **Project Management>Projects**.
2. Click a **project name**.
3. Open the **Planning tab>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 Project Performance Strategy

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

1. Open **Project Management>Projects**.
2. Click a **project name**.
3. Open the **Planning tab>Performance Strategies**.
4. Click the **(Edit icon)** next to a strategy name.
5. Update the information as necessary.
6. Click **Save**.

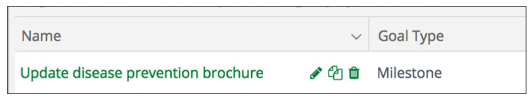
How To Delete a Project Performance Strategy

Prerequisite: Strategy cannot be linked to a performance goal

1. Open **Project Management>Projects**.
2. Click a **project name**.
3. Open the **Planning tab>Performance Strategies**.
4. Click the **(Delete icon)** next to a strategy name.
5. In the pop-up confirmation window, click **Delete**.

How To Link a Project Performance Strategy to a Goal

1. Open **Project Management>Projects**.
2. Click a **project name**.
3. Open the **Planning tab>Performance Goals**.
4. Click the ✎ **(Edit icon)** next to a goal name.



5. In the pop-up window, select a **Strategy**. This will link the goal to an existing strategy.
6. Click **Save**.

How To Link a Project Goal to a Grant Goal

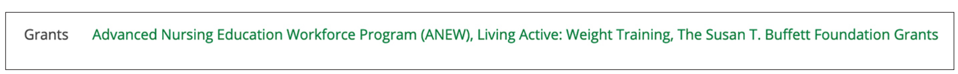
Once the **grant has been linked to the project**, grant performance goals can be linked directly to project performance goals.

Prerequisite: Grant must be linked to the project and goal types must be the same

1. Open **Project Management>Projects**.
2. Click a **project name.**

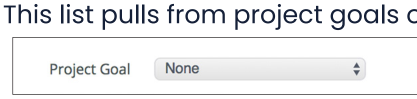
Project Information

3. Click on a **linked grant name**.



Grant Record

4. Open the grant **Post-Award tab>Performance>Performance Plan**.
5. Click the ✎ **(Edit icon)** next to a goal name.
6. In the pop-up window, select the **Project Goal** from the dropdown in the *General tab*. This list pulls from project goals of the same goal type.



7. Click **Save**.

Icons

- Print
- Help
- Save Current View
- Create
- Edit
- Copy
- Delete

Project Budget Planning

The *Planning tab* of a project allows users to build performance plans and budgets. Project budget plans allow project managers to define project budget categories and amounts.

How To Add a Budget Line Item

Budget line items are the planned expenses related to a project. These can be tied directly to a grant's budget line items.

Projects allow for two types of line items: Personnel and Non-Personnel. 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 cannot be tied to a project.

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

1. Open **Project Management>Projects**.
2. Click a **project name**.
3. Open the **Planning tab>Budget**.
4. Click the **+ (Create icon)** in the *Icon Bar*.
5. In the pop-up window, select **Item Type**. This can be **Personnel** or **Non-Personnel**.
6. Select a budget **Category** (optional). This list pulls from *Administration>Lists>Budget Categories*.
7. Add the line item **Name**.
8. Add a **Description** (optional).
9. Add the **Budgeted Amount**.
10. Select a **Responsible Individual**. This list pulls from *Contacts>Staff*.
11. Click **Create**.

How To Add a Project **Personnel** Budget Line Item

Personnel line items are budgeted staff compensation expenses. For more information about compensation history, see the **AmpliFund Contact Management Guide**.

1. Open **Project Management>Projects**.
2. Click a **project name**.
3. Open the **Planning tab>Budget**.
4. Click the **+ (Create icon)** in the *Icon Bar*.

5. In the pop-up window, select **Personnel** from the *Item Type* dropdown.
6. Select the **Category** (optional). This list pulls from *Administration>Lists>Budget Categories*.
7. Add a **Description** (optional).
8. Select the **Responsible Individual**. This list pulls from *Contacts>Staff*.
9. Select the **Employee** name. This list pulls from *Contacts>Staff*.
10. Add the **Position** (optional).
11. Add the amount of **Budgeted Salary**.

Benefits

12. Select a **Benefit** and click **Add** (optional). This list pulls from *Administration>Lists>Benefit Types*.

    a. Add benefit **Amount** as a dollar or percentage.

13. Click **Create**.

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

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

1. Open **Project Management>Projects**.
2. Click a **project name**.
3. Open the **Planning tab>Budget**.
4. Click the **+ (Create icon)** in the *Icon Bar*.
5. In the pop-up window, select **Non-Personnel** from the *Item Type* dropdown.
6. Add a line item **Name**.
7. Add a **Description** (optional).
8. Add the **Budgeted Amount**.
9. Select the **Responsible Individual**. This list pulls from *Contacts>Staff*.
10. Click **Create**.

How To Link a Project Line Item to a Grant Line Item

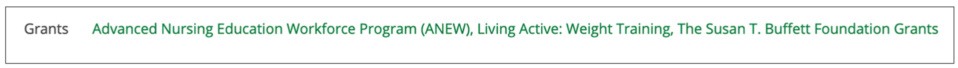
Once the **grant has been linked to the project**, grant line items can be linked directly to project line items.

Prerequisite: Grant must be linked to the project and line item types must be the same

1. Open **Project Management>Projects**.
2. Click a **project name.**

Project Information

3. Click on a **linked grant name**.



Grant Record

4. Open the grant **Post-Award tab>Financial>Budget**.
5. Click the **(Edit icon)** next to a line item name.
6. In the pop-up window, select the **Project Line Item** from the dropdown in the *General tab*. This list pulls from project line items of the same type.

7. Click **Save**.

Project Tools

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

Icons

Print

Help

Create

Address Book

Email Manager

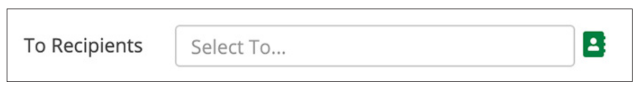
From the Email Manager, users may create and send emails that will be connected to the object record. The emails will be sent to the recipients' primary email addresses and will also appear in *Activity>Message Center*.

How To View an Email

1. Open the **object record**.
2. Open the **Tools tab>Email Manager**.
3. Click the **subject name**.

How To Create an Email

1. Open the **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*, *>Staff, >Lead Recipients*, and *>Sub-Recipients*.



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

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).

10. Click **Send**.

Icons

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

Note

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

Tasks

From the Tasks list, users 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**.

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 Individuals** (optional). This list pulls from *Contacts>Staff*. Additional Individuals 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

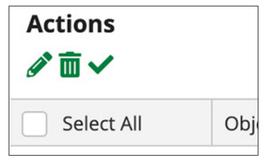
1. Open an **object record**.
2. Open the **Tools tab>Tasks**.
3. Click the **(Edit icon)** next to a task name.

Name	Responsible Individual
Budgeting Tracking Period Due - FY 2018 Block Grant	Sherry Gray

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

-- OR --

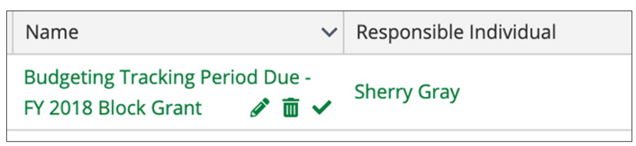
1. Open an **object record**.
2. Open the **Tools tab>Tasks**.
3. Select **task checkboxes**.
4. Click the **(Edit icon)** under *Actions*.



5. In the pop-up window, select **Task Status**, **Responsible Individual**, and/or **Due Date**.
6. Click **Save**.

How To Delete a Task

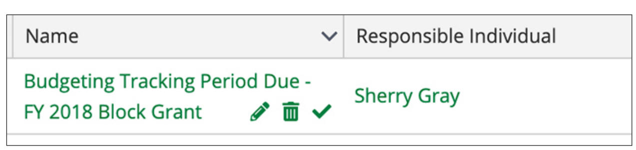
1. Open an **object record**.
2. Open the **Tools tab>Tasks**.
3. Click the **(Delete icon)** next to a task name.



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
- Upload Documents
- Create Folder
- Edit
- Delete
- Download

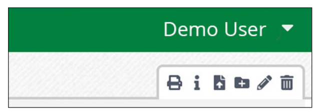
Documents

Within Documents, users can upload and view object-specific files and folders. Once an object record has been created, AmpliFund automatically creates a 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 **(Upload Document icon)** in the *Icon Bar*.



4. In the pop-up window, click **Choose a file** to upload file(s) from your computer.
5. Click **Upload**.

How To View a Document

1. Open an **object record**.
2. Open the **Tools tab>Documents**.
3. Click a **file 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 object record may be stored as a Note. Each note may include a title, note date, text, and an attachment.

How To View a Note

1. Open an **object record**.
2. Open the **Tools tab>Notes**.
3. Click a **note title**.

How To Add a Note

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

How To Edit a Note

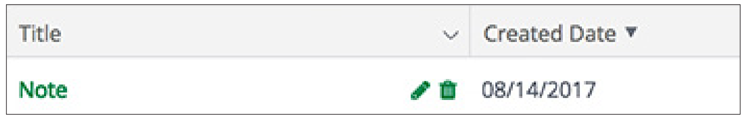
1. Open an **object record**.
2. Open the **Tools tab>Notes**.
3. Click the **(Edit icon)** next to a note title.

Title	Created Date ▼
Note	08/14/2017

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

How To Delete a Note

1. Open an **object record**.
2. Open the **Tools tab>Notes**.
3. Click the **(Delete icon)** next to a note title.



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