**Core Concept: Workflow Overview**

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| Script |
| Welcome to the AmpliFund Core Concept video focused on workflow. |
| First, let’s review what a workflow is and how it is used in AmpliFund.  A workflow enables a structured review process of your applications all within the system.  The workflow will capture a detailed audit trail of each application so you can review the steps each application goes through and which users interacted with it.  Our workflow engine allows you to streamline the process of reviewing applications and moving them forward or rejecting them, it provides reviewers notifications when it’s time for them to take action.  Through the workflow you’ll also have the ability to send applications back if you need additional detail from the applicant. |
| There are some unique words we use with workflow in AmpliFund that might be helpful to know.  First, is an instance, an instance is the collection of queues and actions.  Each application you have may only be enrolled in one workflow instance.  Next is a queue, a queue is the point where your application will stop within the instance for an action to take place.  An action is the actual activity that occurs in within the queue, as part of the set up, you’ll identify which users have access to each action or queue.  Finally, the last term is a workflow notification, this is an email that is sent to users alerting the user they have responsibility to take action.  These emails will come separate from other AmpliFund daily or weekly email notices. |
| As part of your grant maker core subscription you have access to our Opportunity Application review workflow.  This workflow is pre-built in your account and ready for use.  It features the ability to conduct an initial review and a scoring round within the application process.  Your first step will be to assign this workflow to your opportunity.  Then, as part of the set up, you’ll configure if there are any users who you’d like to be notified of lags in action and you’ll assign users to each action within each queue.  Using the Opportunity Application Review workflow is easy!  You simply enroll applications in the workflow when you are ready, it will help streamline tasks and guide reviewers through the scoring process and then ends with awarding or rejecting applications. |
| Let’s do a high-level overview of the queues in the opportunity application review workflow.  In our next video, we’ll dive into the actions available in each queue and how to assign users to those actions.  In the workflow the first queue allows for an initial review for completion, based on that you can send failed applications to a failed queue or you can send applications to a scoring queue.  Then for scored applications, you can either send them to a rejected queue or a selected queue and finally the selected applications will move forward to the awarding phase. |
| Now that you know a bit about the queues you’ll take action in, let’s talk about the first step of assigning the Opportunity Application Review workflow to your opportunity.  You’ll need to assign this workflow instance to every opportunity you build in AmpliFund.  The workflow is added under the Configuration tab, which we’ll demonstrate in a minute. |
| Now let’s work on the next step of configuring your workflow action delay alerts. If you’d like, you can set up a user or users to receive an alert if a number of days have elapsed and an application has not progressed to a new queue.  This is a global setting so it will apply to all opportunities/applications in your account.  As an example, if you want user, Grace Grant to be alerted of any delays of 10 days or more.  Grace can get a notification if application A has been in the “Application Scoring” queue for 10 days. |
| Let’s jump into AmpliFund and demonstrate how to assign a workflow and configure this action delay notifications together.  After logging in, navigate to Award Management>Fund Opportunities. |
| Select the Opportunity you’d like to assign the workflow instance to. |
| Click on the Configuration Tab, then Workflow Settings |
| Ensure the Opportunity Application Review is selected and click Add |
| After you select Add, the workflow queues will appear and the Opportunity Application Review workflow has been assigned. |
| Now, let’s work on configuring the action delay alerts.  Go to Administration, then System Administration then Workflow. |
| On the workflow tab, you will have one workflow option for Opportunity Application Review.  Click on the pencil icon next to the name to edit. |
| Scroll to the notifications section.  If you want to set up action delay alerts, change the first drop down to Yes.  Then configure the days delay you want a user to be notified after.  Then select the user or users you’d like to be notified via email for delays.  As a reminder, this is a global setting for all opportunities in your account and these users would be alerted of delays in any of the queues.  We typically find that our clients configure notifications to send to program administrators or others who have oversight over the entire opportunity portfolio.  As you can see here, once you add a user you do have the opportunity to delete them off notifications so you can always come back and change this setting later. |
| Once you’ve completed your updates, click save at the bottom to save your changes. |
| You’ll land on the workflow details page after saving your changes. |
| Through this Core Concept video, you’ve learned an overview of workflows in AmpliFund.  Should you have additional questions, please reference our support site.  Thank you! |