



AmpliFund



Core Series Recipient 2 – AmpliFund Navigation and Performance Reporting

We will start 2 minutes after the hour!

Recipient Core Series

- Day 1 – Applicant & Recipient Core Series: AmpliFund Applicant Portal: Application Overview and Submission
-  • Day 2 – Applicant & Recipient Core Series: AmpliFund Navigation and Recipient Performance Reporting
- Day 3 – Applicant & Recipient Core Series: Recipient Financial Reporting
- Day 4 – Applicant & Recipient Core Series: Advanced Recipient Management and Tools
- Day 5 – Applicant & Recipient Core Series: State of Illinois Unique Applicant & Recipient Configurations

Agenda

- Navigation
- Master Data
- Grant Details and Settings
- Review Performance Plan
- Enter Achievements
- Close Achievement Reporting Period
- Standard Performance Report
- Activity Center and Tools
- In-Product Demo
- Key Concepts
- Customer Support
- Question and Answer

Navigation

Award Activation Email

- AmpliFund sends an automatic email notification when your Grant is Activated
- Click on the login link to log into AmpliFund
- Click on the use "this link" option if you have never used AmpliFund before



Hello Thomas,

You are receiving this notification because your organization has been given an award from AmpliFund Training: Grant Maker.

This award of 1 years 0 months 0 days begins on 1/1/2024.

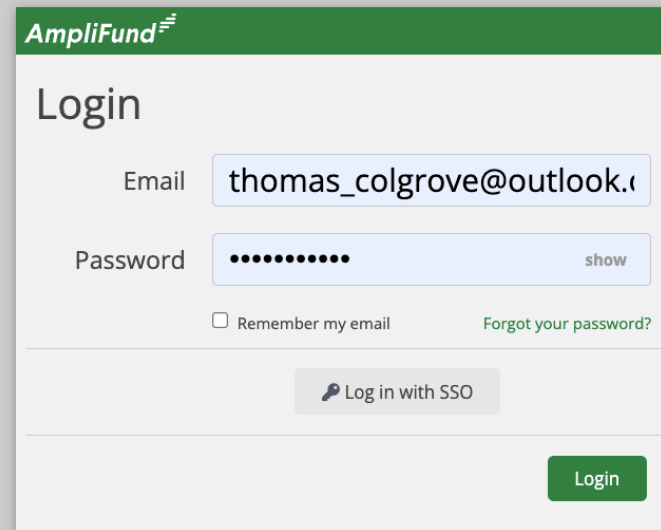
If you currently use AmpliFund, please [login](#) to see the details of your award and get started.

If you have never used AmpliFund, please use [this link](#) to set your password and login.

Regards,
AmpliFund Administrator
AmpliFund Training: Grant Maker

AmpliFund is the leading enterprise grant management platform designed for nonprofit and public sector organizations to manage every phase of the grant management process.

Log Into AmpliFund



The screenshot shows the AmpliFund login interface. At the top is the AmpliFund logo. Below it is the heading "Login". There are two input fields: "Email" containing "thomas_colgrove@outlook.c" and "Password" containing masked characters ".....". To the right of the password field is a "show" link. Below the password field is a checkbox for "Remember my email" and a link for "Forgot your password?". A "Log in with SSO" button is located below the checkbox. At the bottom right is a green "Login" button.

AmpliFund[™]

Login

Email

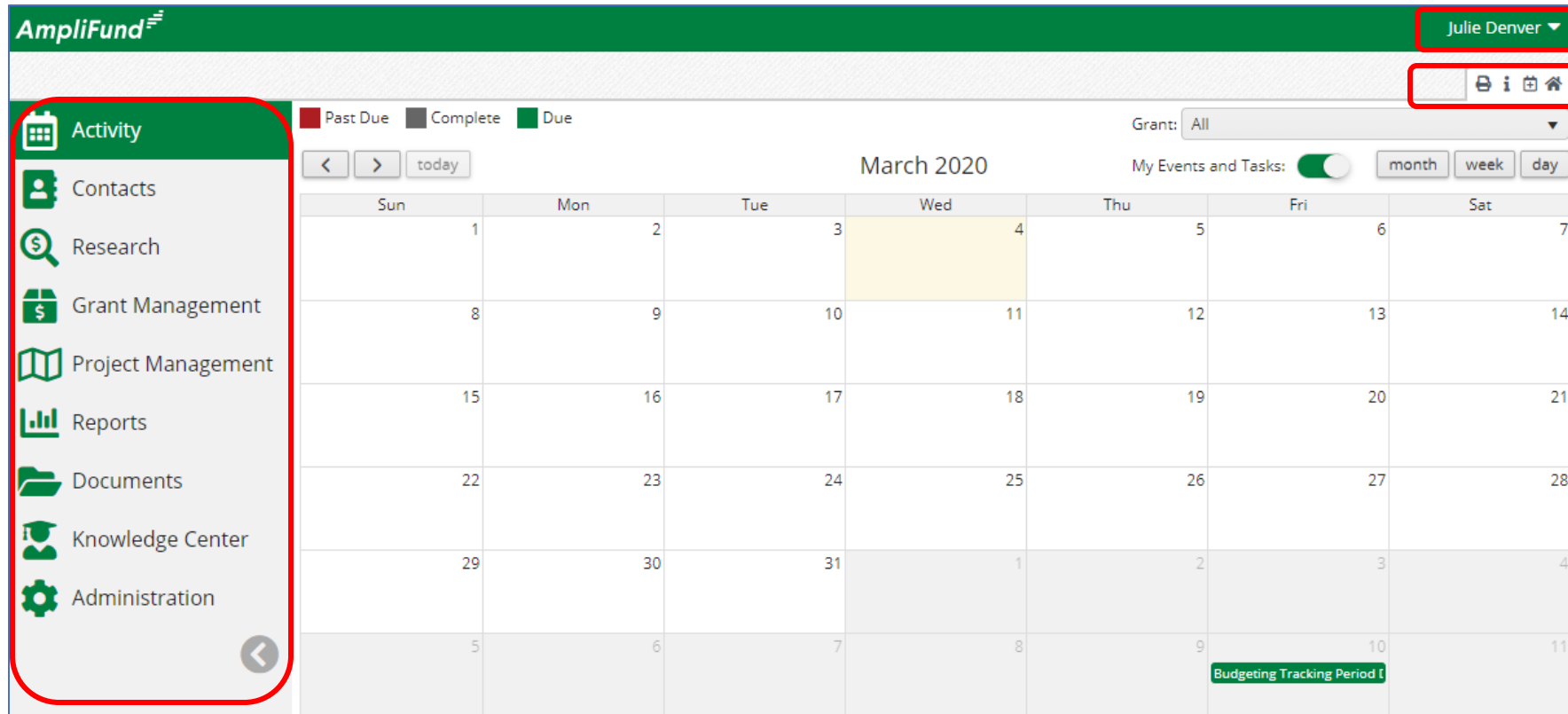
Password [show](#)

Remember my email [Forgot your password?](#)

[Log in with SSO](#)

[Login](#)

7 Navigation Elements



Left Navigation – shows on every page.

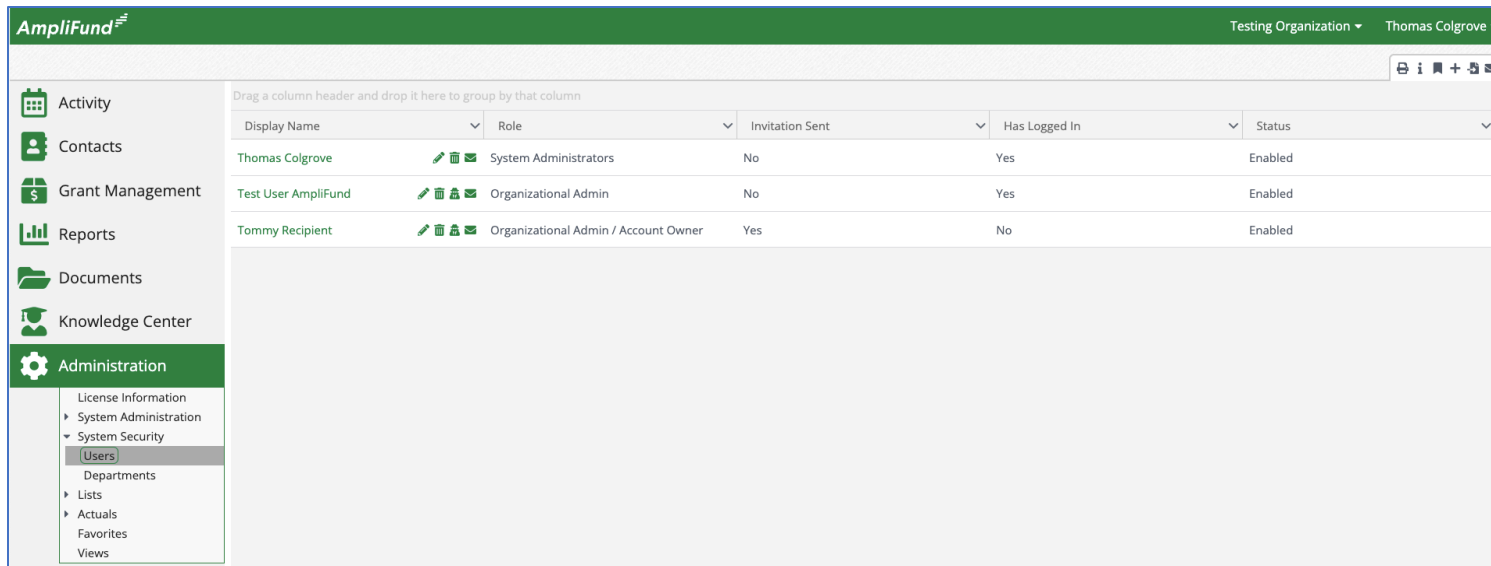
User Navigation – dropdown includes options for account information, change password, message center, support, terms and conditions, applicant portal, and logout.

Options Toolbar – displays icons to perform functions available on the current page, icons vary based on page.

Master Data

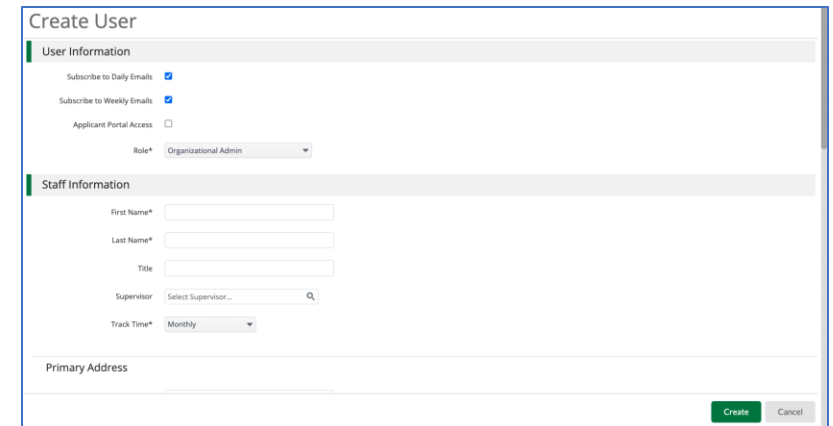
Add User

- Click on Administration > System Security > Users
- Click on the + Icon on the top right of the screen
- Complete the User Information Section
- Complete all required fields marked with an *
- Click Create on the bottom right of the screen
- Click on the envelope icon to invite them into AmpliFund



The screenshot shows the AmpliFund interface with the 'Users' page selected. The top navigation bar includes the AmpliFund logo, 'Testing Organization', and 'Thomas Colgrove'. The left sidebar shows the 'Administration' menu with 'Users' highlighted. The main content area displays a table of users with the following data:

Display Name	Role	Invitation Sent	Has Logged In	Status
Thomas Colgrove	System Administrators	No	Yes	Enabled
Test User AmpliFund	Organizational Admin	No	Yes	Enabled
Tommy Recipient	Organizational Admin / Account Owner	Yes	No	Enabled



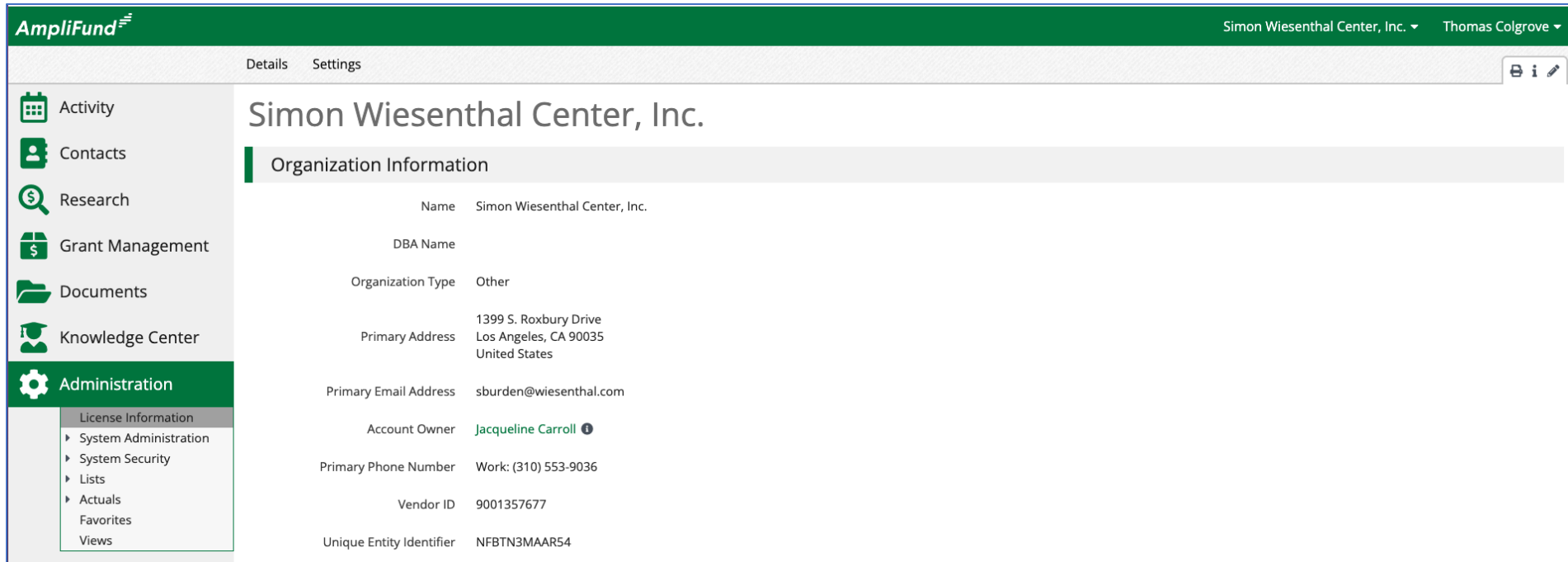
The screenshot shows the 'Create User' form with the following sections and fields:

- User Information:**
 - Subscribe to Daily Emails:
 - Subscribe to Weekly Emails:
 - Applicant Portal Access:
 - Role*: Organizational Admin (dropdown)
- Staff Information:**
 - First Name*:
 - Last Name*:
 - Title:
 - Supervisor: Select Supervisor... (dropdown)
 - Track Time*: Monthly (dropdown)
- Primary Address:**


Buttons: Create, Cancel

Change Account Owner

- Click Administration > License Information
- Click on the pencil edit icon on the top right of the screen
- Update the Primary Admin User
- Click update on the bottom right of the screen



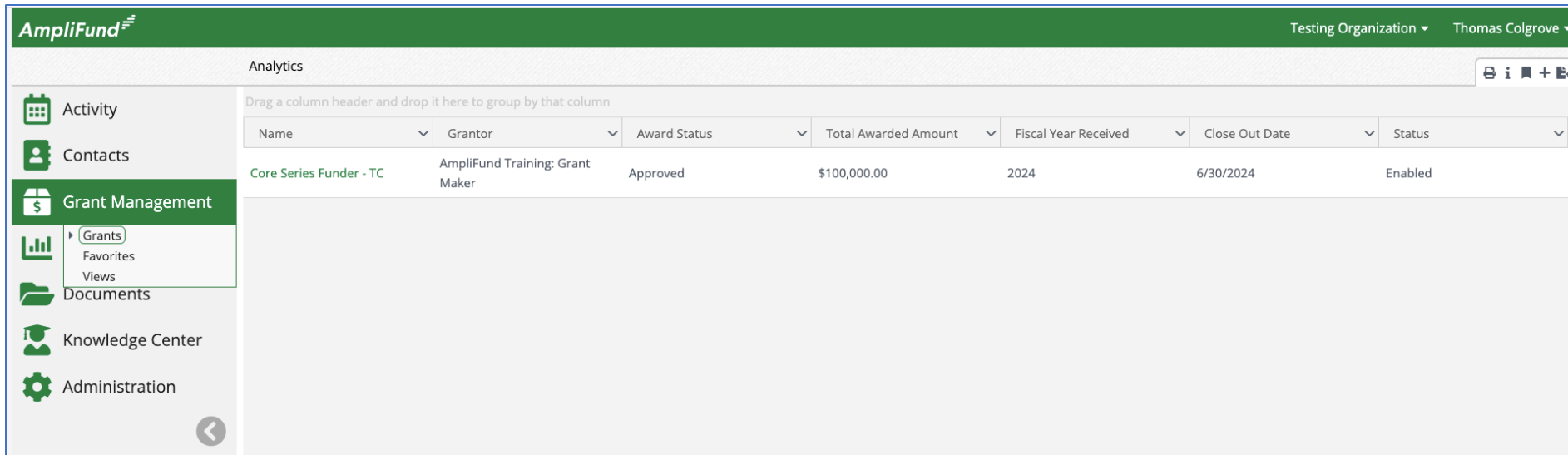
The screenshot shows the AmpliFund web application interface. The top navigation bar is green with the AmpliFund logo on the left and the user name 'Thomas Colgrove' on the right. Below the navigation bar, there are tabs for 'Details' and 'Settings', with 'Settings' being the active tab. On the left side, there is a vertical menu with icons for Activity, Contacts, Research, Grant Management, Documents, Knowledge Center, and Administration. The Administration menu is expanded, showing options like System Administration, System Security, Lists, Actuals, Favorites, and Views. The main content area displays the organization information for 'Simon Wiesenthal Center, Inc.'. The information is organized into sections, with 'Organization Information' being the current view. The details include Name, DBA Name, Organization Type, Primary Address, Primary Email Address, Account Owner, Primary Phone Number, Vendor ID, and Unique Entity Identifier.

Simon Wiesenthal Center, Inc.	
Organization Information	
Name	Simon Wiesenthal Center, Inc.
DBA Name	
Organization Type	Other
Primary Address	1399 S. Roxbury Drive Los Angeles, CA 90035 United States
Primary Email Address	sburden@wiesenthal.com
Account Owner	Jacqueline Carroll 
Primary Phone Number	Work: (310) 553-9036
Vendor ID	9001357677
Unique Entity Identifier	NFBTN3MAAR54

Grant Details and Settings

Access Grant Details

- Click on Grants Management > Grants to access a list of all Grants
- Select the desired Grant and land on the Grant Details page
 - Most of the Post-Award processes start from the Grant Details page

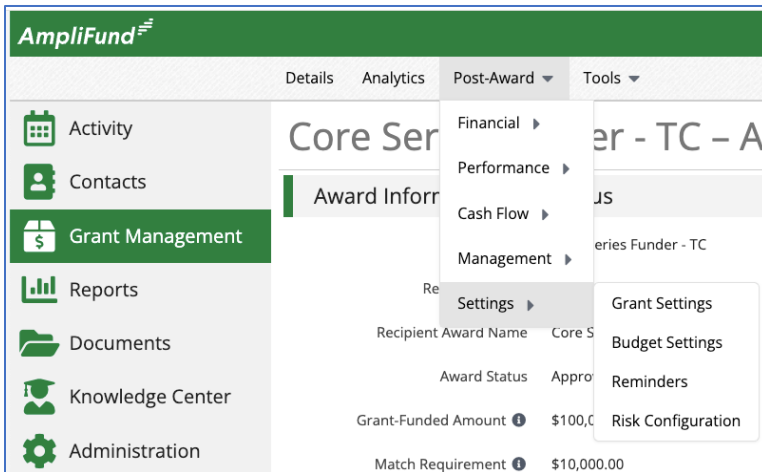


The screenshot shows the AmpliFund Analytics interface. The top navigation bar includes the AmpliFund logo, "Testing Organization", and "Thomas Colgrove". The left sidebar contains navigation options: Activity, Contacts, Grant Management (highlighted), Documents, Knowledge Center, and Administration. The "Grant Management" menu is expanded to show "Grants", "Favorites", and "Views". The main content area displays a table with the following data:

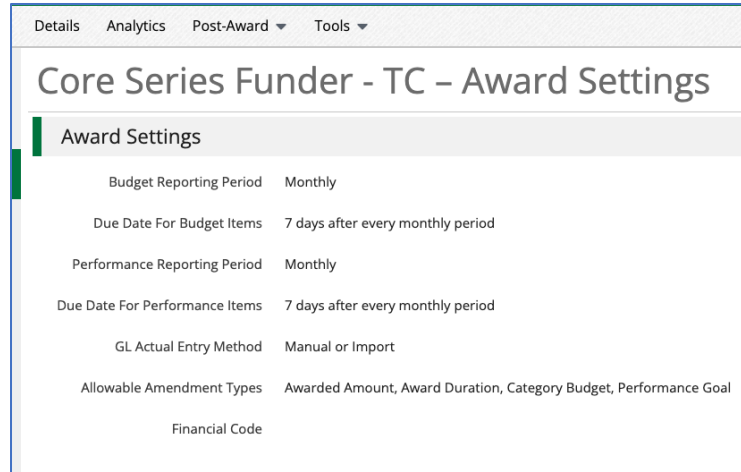
Analytics							
Drag a column header and drop it here to group by that column							
Name	Grantor	Award Status	Total Awarded Amount	Fiscal Year Received	Close Out Date	Status	
Core Series Funder - TC	AmpliFund Training: Grant Maker	Approved	\$100,000.00	2024	6/30/2024	Enabled	

Review Grant and Budget Settings

- From the Grant Details page click on Post-Award > Settings and open the Budget and the Grant Settings in a new tab and review
 - Your funder configures the settings

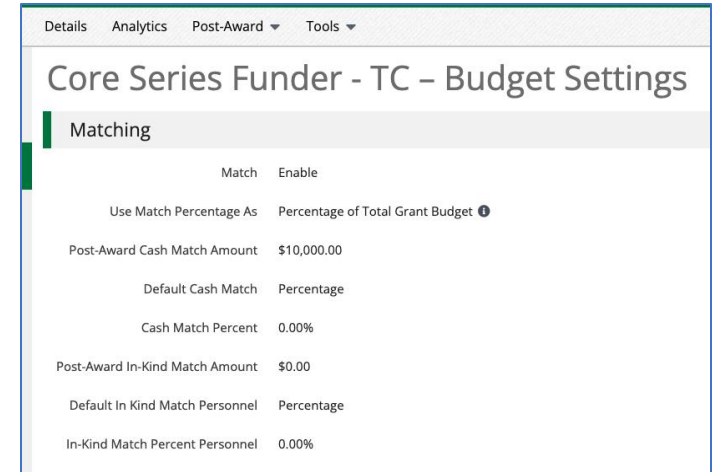


The screenshot shows the AmpliFund interface. The navigation menu on the left includes Activity, Contacts, Grant Management (highlighted), Reports, Documents, Knowledge Center, and Administration. The main content area shows the 'Core Series Funder - TC - Award Settings' page. The 'Post-Award' dropdown menu is open, showing options: Financial, Performance, Cash Flow, Management, and Settings. The 'Settings' option is selected, and a sub-menu is visible with options: Grant Settings, Budget Settings, Reminders, and Risk Configuration.



The screenshot shows the 'Core Series Funder - TC - Award Settings' page. The page title is 'Core Series Funder - TC - Award Settings'. The 'Award Settings' section includes the following information:

Budget Reporting Period	Monthly
Due Date For Budget Items	7 days after every monthly period
Performance Reporting Period	Monthly
Due Date For Performance Items	7 days after every monthly period
GL Actual Entry Method	Manual or Import
Allowable Amendment Types	Awarded Amount, Award Duration, Category Budget, Performance Goal
Financial Code	



The screenshot shows the 'Core Series Funder - TC - Budget Settings' page. The page title is 'Core Series Funder - TC - Budget Settings'. The 'Matching' section includes the following information:

	Match	Enable
Use Match Percentage As	Percentage of Total Grant Budget	
Post-Award Cash Match Amount	\$10,000.00	
Default Cash Match	Percentage	
Cash Match Percent	0.00%	
Post-Award In-Kind Match Amount	\$0.00	
Default In Kind Match Personnel	Percentage	
In-Kind Match Percent Personnel	0.00%	

Update Grant Details

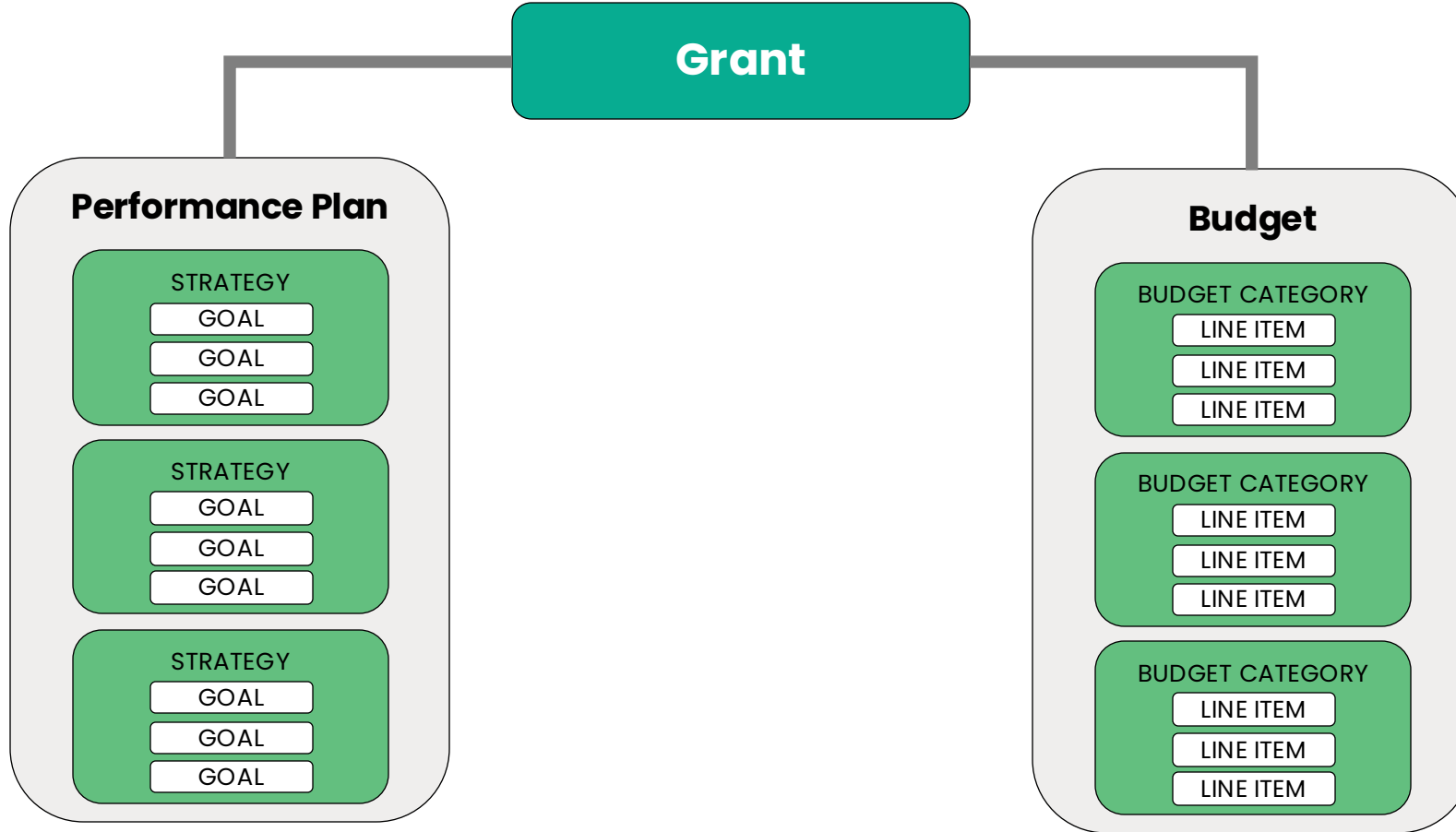
- Click on the pencil edit icon on the top right of the screen
- Update the Recipient Grant Name – Optional
- Update the Recipient Grant Manager – Required
 - Pulls from a list of Users in your account
- Update the Recipient Description – Optional
- Click Save on the bottom right of the screen

The screenshot displays the 'Edit Award' interface in the AmpliFund system. The top navigation bar includes 'Details', 'Analytics', 'Pre-Award', 'Post-Award', and 'Tools'. The user 'Thomas Colgrove' is logged in. The left sidebar contains navigation options: Activity, Contacts, Grant Management (highlighted), Reports, Documents, Knowledge Center, and Administration. The main content area is divided into two sections: 'Award Information and Status' and 'Post-Award Information'. The 'Award Information and Status' section includes fields for Name* (Core Series Recipient Award), Recipient Name (Applicant Portal Test Account - TC), Recipient Award Name (Core Series Recipient Award), Fund Activity Categories, and Award Status (Approved). The 'Post-Award Information' section includes Responsible Person (Tommy Grantor), Grant Manager*, Recipient Grant Manager* (a dropdown menu with the text 'Select recipient grant manager...'), Award Identification Number, RFP ID Number, Funding Opportunity Number, and Assistance Listings Number. At the bottom right, there are 'Save' and 'Cancel' buttons.

Review Performance Plan

Grant Overview

Plan Budget and Performance



Performance Plan: Goal Types

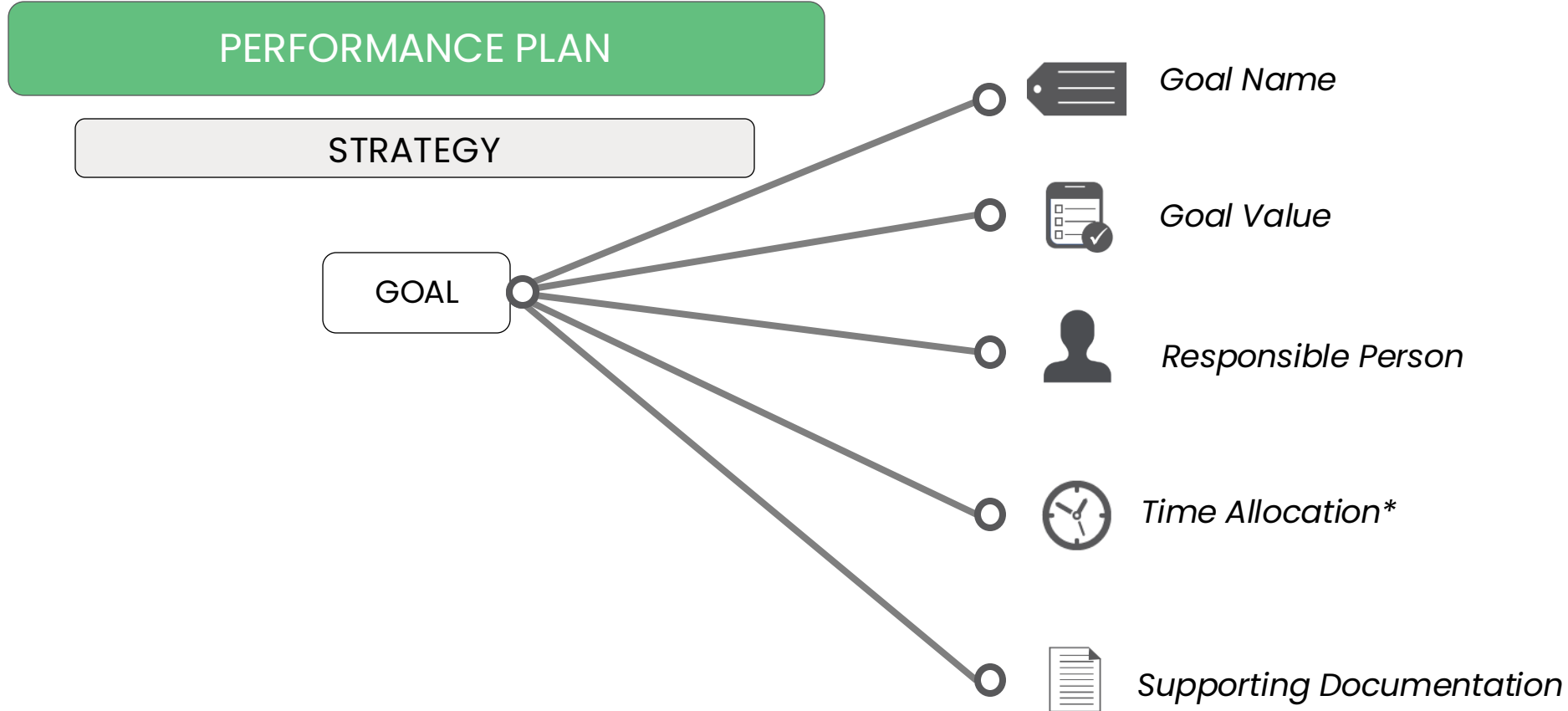
Goal Type	Definition	Example
Milestone	The most basic goal type. They allow for tracking progress as a “Yes” or “No” response by the Responsible Individual.	Create and send Q1 Staff Survey.
Narrative	Question and answer goals. Responsible Individuals may answer the question posed by the goal.	How successful was the grant-related activity this period?
Numeric	A discrete number to achieve. As units of the goal are completed, Responsible Individuals may record units completed.	“Number of program participants” with a goal target of 50.

Performance Plan: Goal Types

Goal Type	Definition	Example
Percent Achieved	Goals to reach a desired percent. When tracking progress against a percent achieved goal, Responsible Individuals may capture Total Possible and Total Achieved percentages.	“Volunteer Retention Rate” with a goal target of 70%.
Percent Changed	Goals to track a percent increase or decrease. Percent change goals are defined with a starting percent and a desired percent. When tracking progress against a percent change goal, Responsible Individuals may capture Total Possible and Total Achieved percentages.	“Decrease in Student Absences” with a starting absentee rate of 10% and a goal absentee rate of 3%.
Reimbursement	Goals with a discrete unit to achieve, and a dollar rate associated per unit. When tracking progress against a reimbursement goal, Responsible Individuals may enter Units Achieved.	“Number of Patient Screenings” with target/maximum units of 100, and a reimbursement rate per unit of \$22.

Performance Plan - Goals

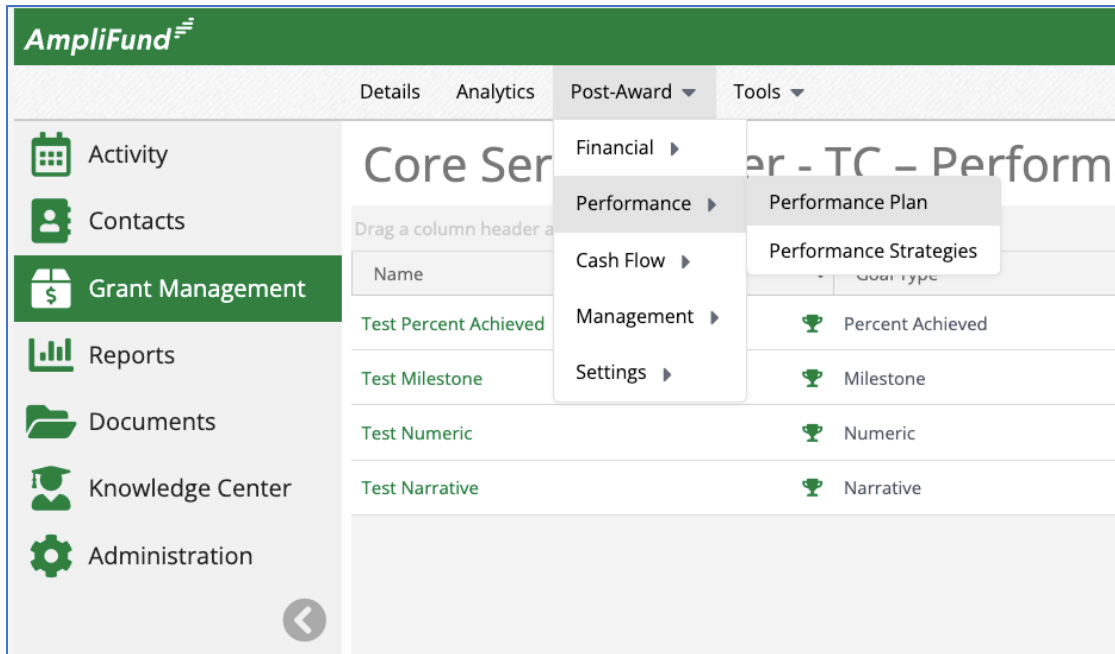
Manage Performance Plans



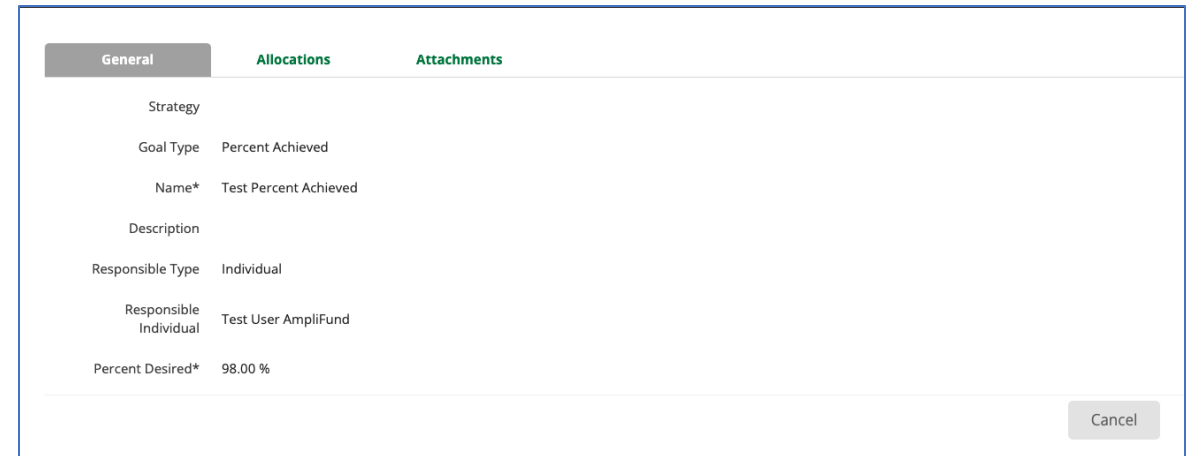
*Allocations available for Narrative, Numeric, Percent Achieved, Percent Changed, and Reimbursement Goal types

Access Performance Plan and Review Goals

- From the Grant Details page click on Post-Award > Performance > Performance Plan
- Click on the Performance Plan goal to review the details
- Check the Allocations and for Attachments



The screenshot shows the AmpliFund interface. On the left is a navigation menu with items: Activity, Contacts, Grant Management (highlighted), Reports, Documents, Knowledge Center, and Administration. The main content area shows a breadcrumb trail: Details > Analytics > Post-Award > Tools. A dropdown menu is open under 'Post-Award', showing options: Financial, Performance (selected), Cash Flow, Management, and Settings. The 'Performance' dropdown is further open, showing 'Performance Plan' (selected), 'Performance Strategies', 'Percent Achieved', 'Milestone', 'Numeric', and 'Narrative'. The background shows a table with columns for Name, Test Percent Achieved, Test Milestone, Test Numeric, and Test Narrative.



The screenshot shows the details page for a Performance Plan goal. The 'Allocations' tab is selected. The page displays the following information:

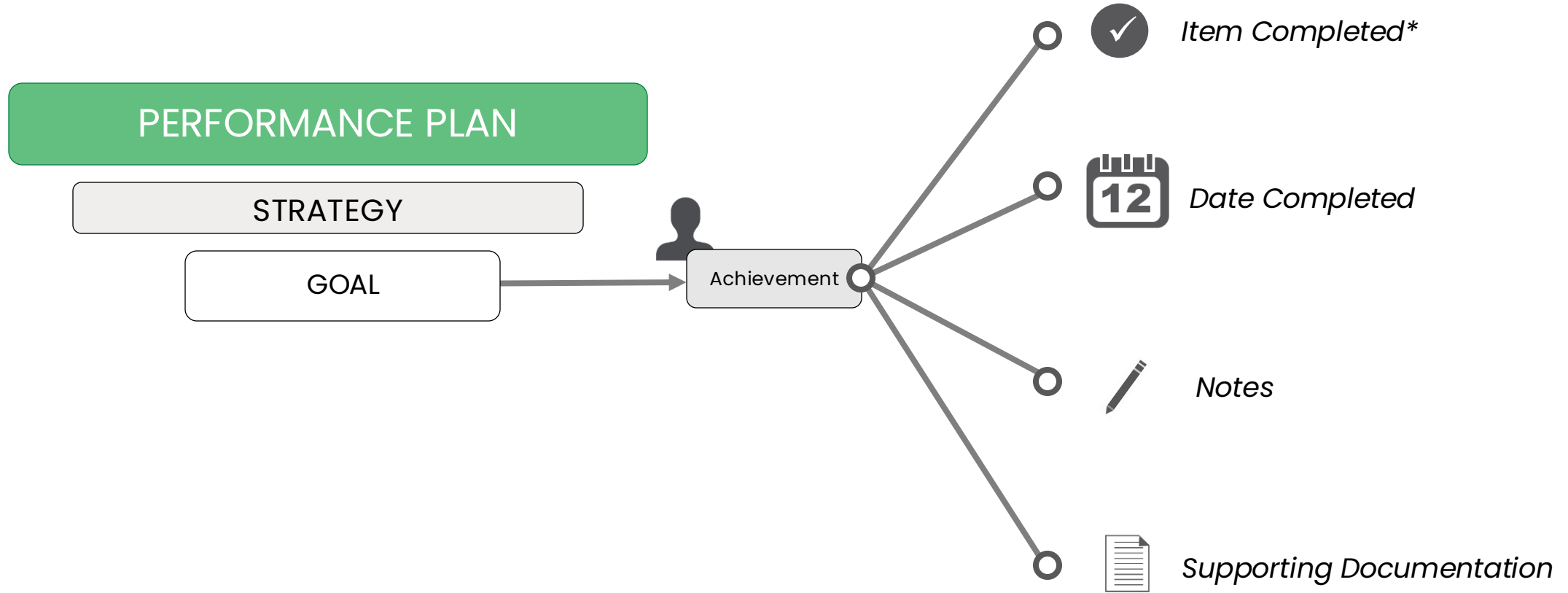
Field	Value
Strategy	
Goal Type	Percent Achieved
Name*	Test Percent Achieved
Description	
Responsible Type	Individual
Responsible Individual	Test User AmpliFund
Percent Desired*	98.00 %

A 'Cancel' button is located at the bottom right of the page.

Enter Achievements

Performance Plan: Achievements

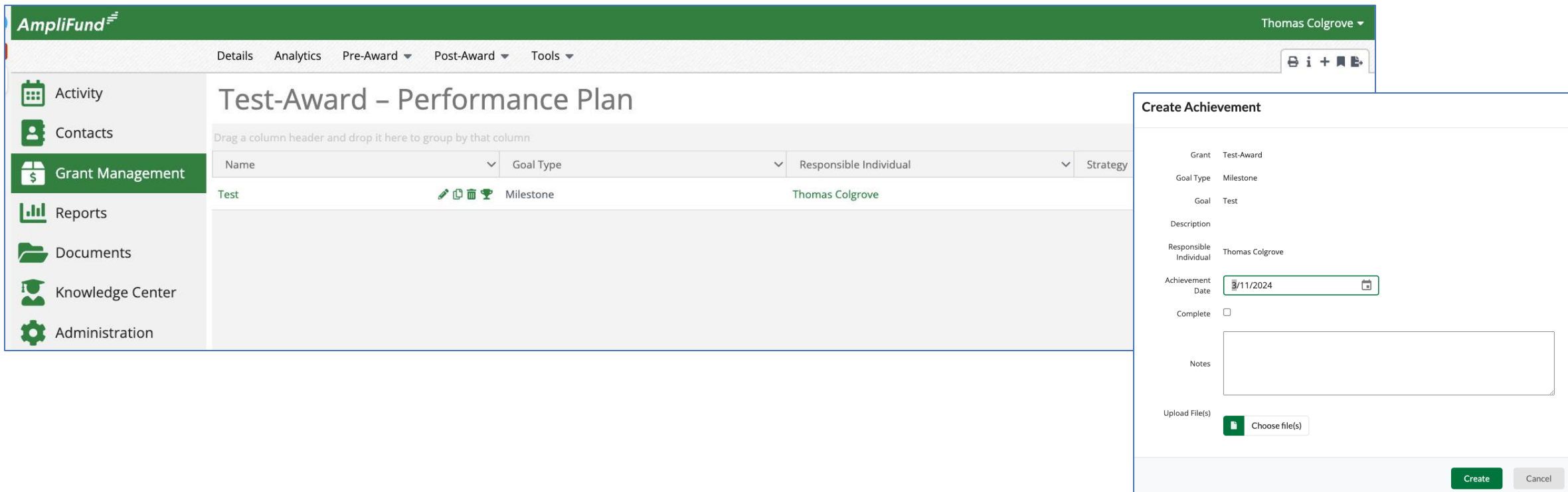
Manage Performance Plans



*Item completed formatting is determined by goal type: i.e. a number completed, an answer to a question, etc.

Enter Achievements

- Click on the Trophy icon next to the Performance Plan Goal
- Click on the + Icon next on the top right of the screen
- Click on the Performance Plan on the top left of the screen to get back to the Performance Plan list



The screenshot displays the AmpliFund web application interface. The top navigation bar includes the AmpliFund logo, the user name 'Thomas Colgrove', and a dropdown menu with options: Details, Analytics, Pre-Award, Post-Award, and Tools. A left sidebar contains navigation icons for Activity, Contacts, Grant Management (highlighted), Reports, Documents, Knowledge Center, and Administration.

The main content area is titled 'Test-Award - Performance Plan' and features a table with the following columns: Name, Goal Type, Responsible Individual, and Strategy. The table contains one row with the value 'Test' under Name, 'Milestone' under Goal Type, and 'Thomas Colgrove' under Responsible Individual. A toolbar above the table includes icons for edit, delete, and add, along with a trophy icon.

A 'Create Achievement' modal is open on the right side of the screen. It contains the following fields and options:

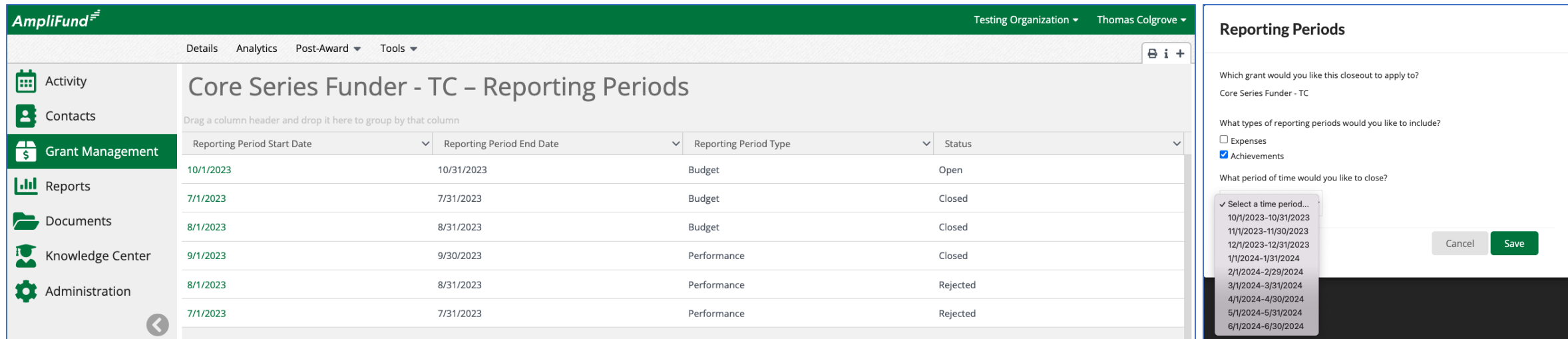
- Grant: Test-Award
- Goal Type: Milestone
- Goal: Test
- Description: (empty text area)
- Responsible Individual: Thomas Colgrove
- Achievement Date: 3/11/2024 (with a calendar icon)
- Complete:
- Notes: (empty text area)
- Upload File(s): Choose file(s) (with a file upload icon)

At the bottom of the modal are 'Create' and 'Cancel' buttons.

Close Achievement Reporting Period

Access Reporting Periods

- From the Grant Details page click on Post-Award > Management > Reporting Periods
- Click on the + Icon on the top right of the screen
- Select Achievements
- Select the Reporting Period
- Click Save on the bottom right of the screen



The screenshot displays the AmpliFund interface for managing reporting periods. The main window shows a table of reporting periods for 'Core Series Funder - TC'. The table has columns for Reporting Period Start Date, Reporting Period End Date, Reporting Period Type, and Status. A modal window is open on the right, titled 'Reporting Periods', with a dropdown menu showing a list of time periods to select.

Reporting Period Start Date	Reporting Period End Date	Reporting Period Type	Status
10/1/2023	10/31/2023	Budget	Open
7/1/2023	7/31/2023	Budget	Closed
8/1/2023	8/31/2023	Budget	Closed
9/1/2023	9/30/2023	Performance	Closed
8/1/2023	8/31/2023	Performance	Rejected
7/1/2023	7/31/2023	Performance	Rejected

The modal window 'Reporting Periods' contains the following information:

- Which grant would you like this closeout to apply to?
Core Series Funder - TC
- What types of reporting periods would you like to include?
 Expenses
 Achievements
- What period of time would you like to close?
 Select a time period...
 10/1/2023-10/31/2023
 11/1/2023-11/30/2023
 12/1/2023-12/31/2023
 1/1/2024-1/31/2024
 2/1/2024-2/29/2024
 3/1/2024-3/31/2024
 4/1/2024-4/30/2024
 5/1/2024-5/31/2024
 6/1/2024-6/30/2024
- Buttons: Cancel, Save

Close Reporting Periods

- Attach documents as needed
- Check that Achievements are pulling into the Reporting Period
- Click the Close button on the bottom right of the screen to submit to your funder
- Clicking Save will create the Reporting Period but does not submit it to your funder

Core Series Funder - TC – Reporting Periods

📅 Start: 7/1/2023 📅 End: 7/31/2023

Status: Rejected

Achievements ⌵

Overall Achievements Details

Number of Goals with No Achievements 1

Comments

Attach Documentation 🗑️

Choose a file

Achievements Analytics

Goal	Type	# of Achievements Period to Date
Test Percent Achieved	Percentage Achieved	0
Test Milestone	Milestone	1
Test Numeric	Numeric Goal	1
Test Narrative	Narrative	1

Achievements Closeout

Select All

Select	Goal	Goal Type	Description	Last Achievement
<input checked="" type="checkbox"/>	Test Milestone	Milestone		7/31/2023
<input checked="" type="checkbox"/>	Test Numeric	Numeric Goal		7/31/2023
<input checked="" type="checkbox"/>	Test Narrative	Narrative		7/31/2023

Cancel
Close
Save

Navigate back to the Reporting Period List Page

- After Closing click on the Reporting Periods tab on the top left of the Reporting Period page to access the list of all Reporting Periods for this Grant

The screenshot displays the AmpliFund web interface. At the top, the AmpliFund logo is on the left, and 'Testing Organization' and 'Thomas Colgrove' are on the right. Below the header, the page title is 'Reporting Periods'. A left-hand navigation menu includes 'Activity', 'Contacts', 'Grant Management' (highlighted), 'Reports', 'Documents', 'Knowledge Center', and 'Administration'. The main content area is titled 'Core Series Funder - TC - Reporting Periods'. It shows a start date of 9/1/2023 and an end date of 9/30/2023. The status is 'Closed'. There is a green 'Achievements' button with a circular icon. Below this is a section titled 'Overall Achievements Details' which includes a metric 'Number of Goals with No Achievements' with a value of 3, a 'Comments' text area, and an 'Attach Documentation' section. Under 'Attach Documentation', there is a list of 'Existing Attachments' with one file named 'Logo-FullColor-hi-res.jpeg'.

Standard Performance Reports

Performance Plan Detail and Performance Plan Summary Report

- Click on Reports > Post-Award
 - Performance Plan Detail
 - Performance Plan Summary
- Configure the Filters from the column on the right side of the page
 - Filter by All, Grant, Responsible Individual, Achievement Date, and Goal Type
- Click the Export PDF tab to export as
 - PDF, Excel, RTF, CSV

AmpliFund Testing Organization Thomas Colgrove

Activity Contacts Grant Management Reports

Grant Performance Plan ...

Export PDF

Find...

Filters

Grant Name Core Series Funder - TC

Goal Type All

Achievement Date 07/31/2023 09/28/2023

Responsible Individual Test User AmpliFund

Columns

Grant Performance Plan Detail

Grant Name Core Series Funder - TC
Grant Amount \$100,000.00

Milestone	Goal	Responsible Individual	Achievement Date	Has Attachment	Completed	Due Date	Date Complete
Test Milestone	Test User AmpliFund	Test User AmpliFund	07/31/2023	No	No	06/30/2024	07/31/2023
Test Milestone	Test User AmpliFund	Test User AmpliFund	08/31/2023	No	No	06/30/2024	08/31/2023

Narrative

Goal	Responsible Individual	Achievement Date	Has Attachment	Completed	Question	Answer
Test Narrative	Test User AmpliFund	07/31/2023	No	No	Test Question	Things went good...
Test Narrative	Test User AmpliFund	08/31/2023	No	No	Test Question	Put the answer here...

Numeric

Goal	Responsible Individual	Achievement Date	Has Attachment	Completed	Number to be Achieved	Number Achieved	Variance
Test Numeric	Test User AmpliFund	07/31/2023	No	No	24	2	-91.67%
Test Numeric	Test User AmpliFund	08/31/2023	No	No	24	2	-91.67%
Test Numeric	Test User AmpliFund	09/28/2023	No	No	24	2	-91.67%
Achievement Subtotal					6.00		-75.0%

Percent Achieved

Goal	Responsible Individual	Achievement Date	Has Attachment	Completed	Percent Desired	Percent Achieved	Variance
Test Percent Achieved	Test User AmpliFund	08/31/2023	No	No	98.00%	95.0%	-3.0%
Achievement					98.00%	93.0%	-5.0%

AmpliFund Testing Organization Thomas Colgrove

Activity Contacts

Grant Performance Plan ...

Export PDF

Find...

Filters

Grant Name Core Series Funder - TC

Responsible Individual Test User AmpliFund

Achievement Date 07/31/2023 09/28/2023

Goal Type All

Columns

Performance Plan Summary

Grant Name Core Series Funder - TC
Award Amount \$100,000.00

Milestone	Goal	Responsible Individual	Achievement Date	Completed	Due Date	Date Complete
Test Milestone	Test User AmpliFund	Test User AmpliFund	08/31/2023	No	06/30/2024	08/31/2023

Narrative

Goal	Responsible Individual	Achievement Date	Completed	Question	Answers
Test Narrative	Test User AmpliFund	08/31/2023	No	Test Question	2

Numeric

Goal	Responsible Individual	Achievement Date	Completed	Number to be Achieved	Number Achieved	Variance
Test Numeric	Test User AmpliFund	09/28/2023	No	24	6	-18.00

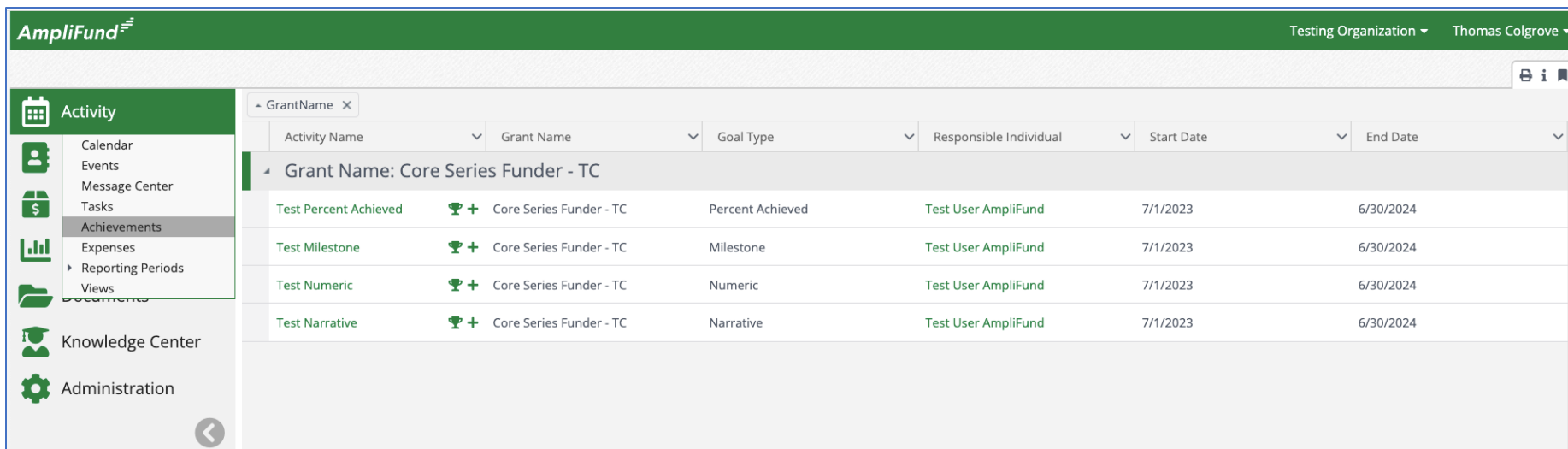
Percent Achieved

Goal	Responsible Individual	Achievement Date	Completed	Percent Desired	Percent Achieved	Variance
Test Percent Achieved	Test User AmpliFund	08/31/2023	No	98%	95.00%	-3%

Activity Center and Tools

Activity Center – Achievements

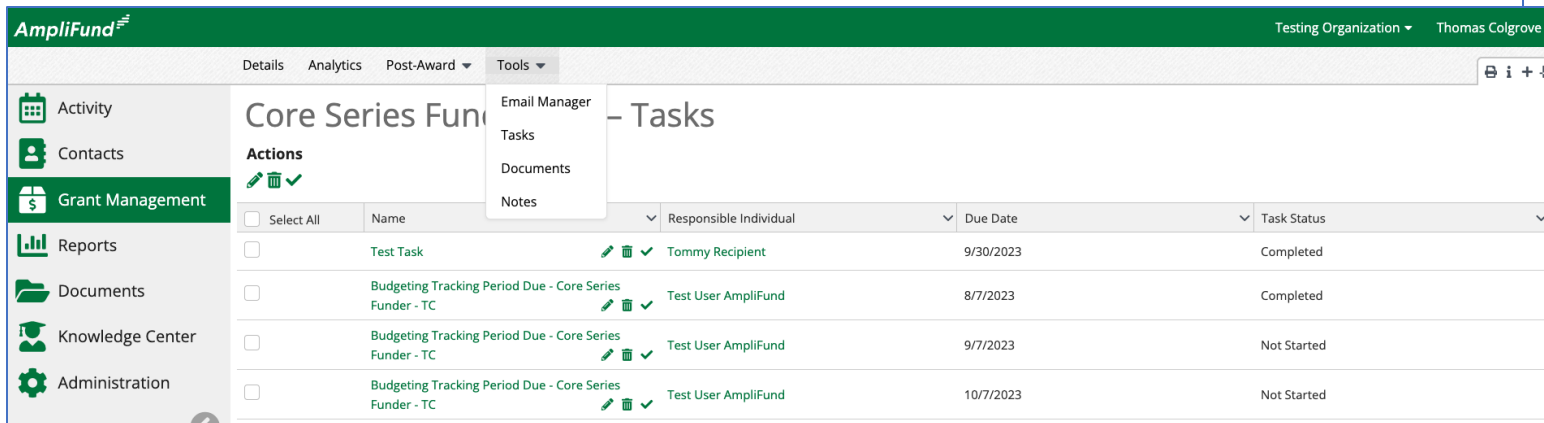
- Click on Activity > Achievements for a shortcut to entering Achievements
- All Performance Plan Goals for all Grants are listed here
- Drag the Grant Name Colum into the row of the page
- Click on the bookmark icon on the top right of the screen to save this view
- Click Activity > Views to access the view later
- Click on the + icon next to the desired Performance Plan Goal to add an Achievement



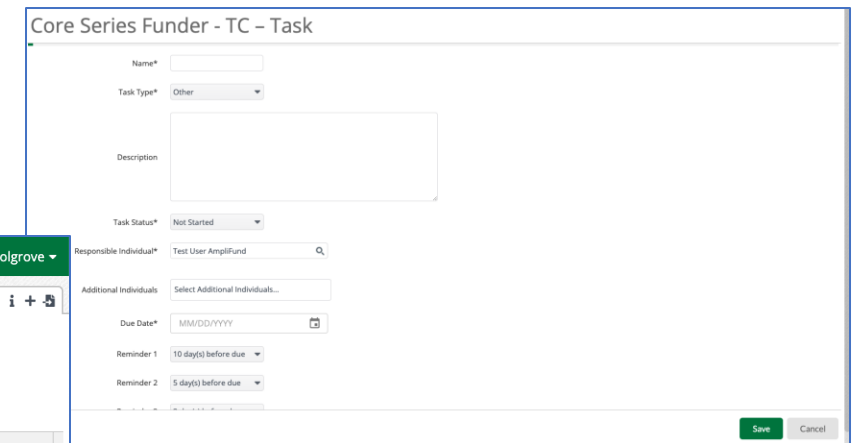
Activity Name	Grant Name	Goal Type	Responsible Individual	Start Date	End Date
Grant Name: Core Series Funder - TC					
Test Percent Achieved	Core Series Funder - TC	Percent Achieved	Test User AmpliFund	7/1/2023	6/30/2024
Test Milestone	Core Series Funder - TC	Milestone	Test User AmpliFund	7/1/2023	6/30/2024
Test Numeric	Core Series Funder - TC	Numeric	Test User AmpliFund	7/1/2023	6/30/2024
Test Narrative	Core Series Funder - TC	Narrative	Test User AmpliFund	7/1/2023	6/30/2024

Tools – Tasks

- There are auto-generated standard tasks for Budget and Performance reporting requirements that you must mark as complete
 - Click on the checkmark icon next to the Task to mark as complete
- You can create Tasks and automatic reminders for yourself or other Users in your account
 - Click on the + icon on the top right of the screen
 - Enter all required information
 - Configure reminders
 - Click Save on the bottom right of the screen



Select All	Name	Responsible Individual	Due Date	Task Status
<input type="checkbox"/>	Test Task	Tommy Recipient	9/30/2023	Completed
<input type="checkbox"/>	Budgeting Tracking Period Due - Core Series Funder - TC	Test User AmpliFund	8/7/2023	Completed
<input type="checkbox"/>	Budgeting Tracking Period Due - Core Series Funder - TC	Test User AmpliFund	9/7/2023	Not Started
<input type="checkbox"/>	Budgeting Tracking Period Due - Core Series Funder - TC	Test User AmpliFund	10/7/2023	Not Started



Core Series Funder - TC - Task

Name*

Task Type*

Description

Task Status*

Responsible Individual*

Additional Individuals

Due Date*

Reminder 1

Reminder 2

In-Product Demo

Key Concepts

Key Concepts

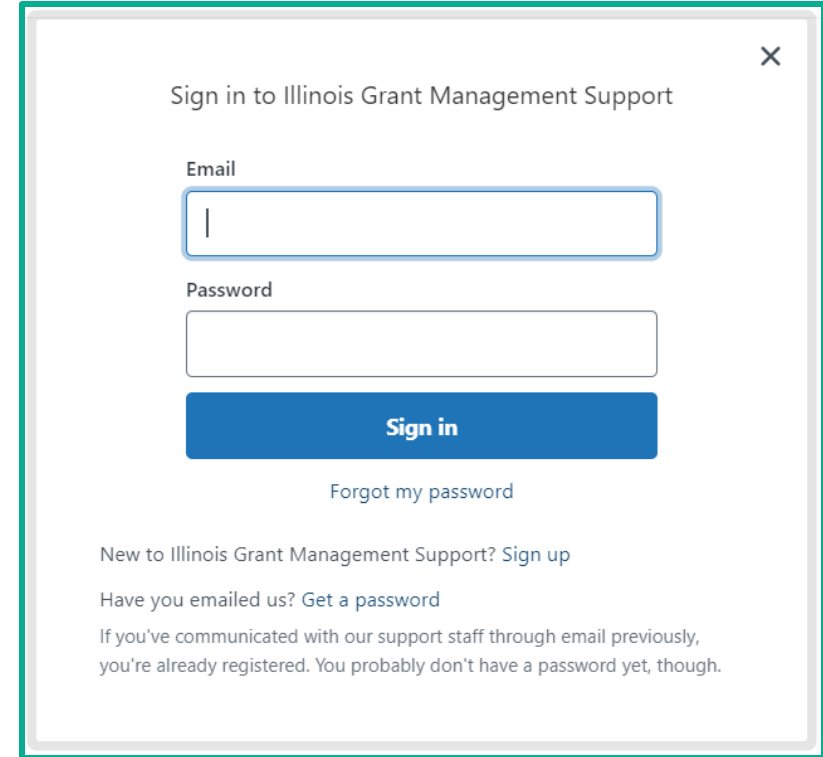
- Basic AmpliFund Navigation
- Review Grant Settings
- Update Grant Details
- Performance Reporting
 - Performance Plan
 - Achievements
 - Reporting Periods
 - Standard Reports
 - Activity Center and Tools

Next Session: Financial Reporting

Customer Support

Create AmpliFund Support Account

1. Go to the appropriate support site
 - <https://amplifund.zendesk.com>
 - <https://il-amplifund.zendesk.com>
 - <https://ne-amplifund.zendesk.com>
2. Click the **Sign up** link
3. Enter your **full name**
4. Enter your **email address**
5. Complete the **I'm not a robot** check
6. Click the **Sign up** button
7. An email from support@zendesk.com will be sent to you via email
8. Click the link to set your password



Sign in to Illinois Grant Management Support

Email

Password

Sign in

[Forgot my password](#)

New to Illinois Grant Management Support? [Sign up](#)

Have you emailed us? [Get a password](#)

If you've communicated with our support staff through email previously, you're already registered. You probably don't have a password yet, though.

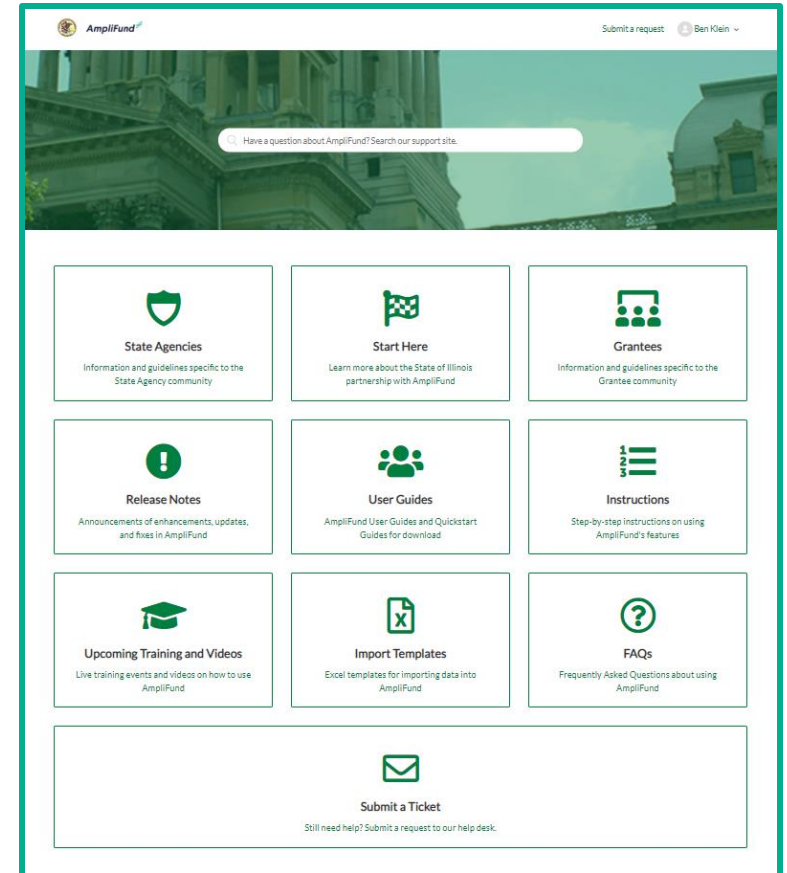
AmpliFund Illinois Support Portal

Submit a support ticket:

- Commercial – Support@amplifund.zendesk.com
- Illinois – Support@il-amplifund.zendesk.com
- Nebraska – Support@ne-amplifund.zendesk.com

Supported Browsers:

- Google Chrome (current supported releases)
- Mozilla Firefox (current supported releases)
- Microsoft Edge (current supported releases)
- Apple Safari 10+



Question and Answer