



*AmpliFund* 



# Grant Seeker Core Series

**Workflow**

# Core Series Overview

- Training 1: Custom Forms & Form Extensions
- ➔ • Training 2: Workflow
- Training 3: Projects

# Agenda

- What are Workflows
- Grant Workflow Use Case
- Access Workflows
- Create Workflows
- Workflow Considerations
- In-Product Demo
- Next Steps
- Customer Support
- Question & Answer

# What are Workflows

# What are Workflows

The Workflow Module allows clients to build customized workflows to match business processes. Workflows enable a structured review and approval process, in addition to enforcing accountability through audit trails and workflow routing history. Automated email notifications are sent to responsible users when they have a workflow item to complete.

## Important Terms

- **Workflow Queues** – Workflow queues are phases or stopping points within a workflow. Queues contain actions that may take place within that queue.
- **Workflow Actions** – Workflow actions are items performed within a workflow queue. Actions may be categorized from a variety of types, depending on what needs to take place.
- **User Permissions** – User permissions give staff members access and/or responsibility for a workflow action. Users who are assigned permissions on an action receive email notifications for their action, and may manage their actions in Activity > Workflow Actions.

# Grant Workflow Use Case

# Seeker Use Case – Apply to Grant Opportunity

## Apply to Grant Opportunity

- Sarah, the Pre-Award Grant Manager at ABC Org, is responsible for finding and applying for grant opportunities. To make this process more efficient, ABC Org uses the AmpliFund grant management system. In today's training, we will design a Pre-Award Workflow tailored to the organization's unique business needs.

## Award Closeout

- Lee, the Post-Award Grant Manager at XYZ Foundation, manages the annual award closeout processes. To improve efficiency, Lee's team uses the AmpliFund grant management system. In today's session, we will develop a Post-Award Workflow customized to fit XYZ Foundation's closeout procedures.

# Access and Edit Workflows



# Access Workflows

- Click on Administration > System Administration > Workflows.

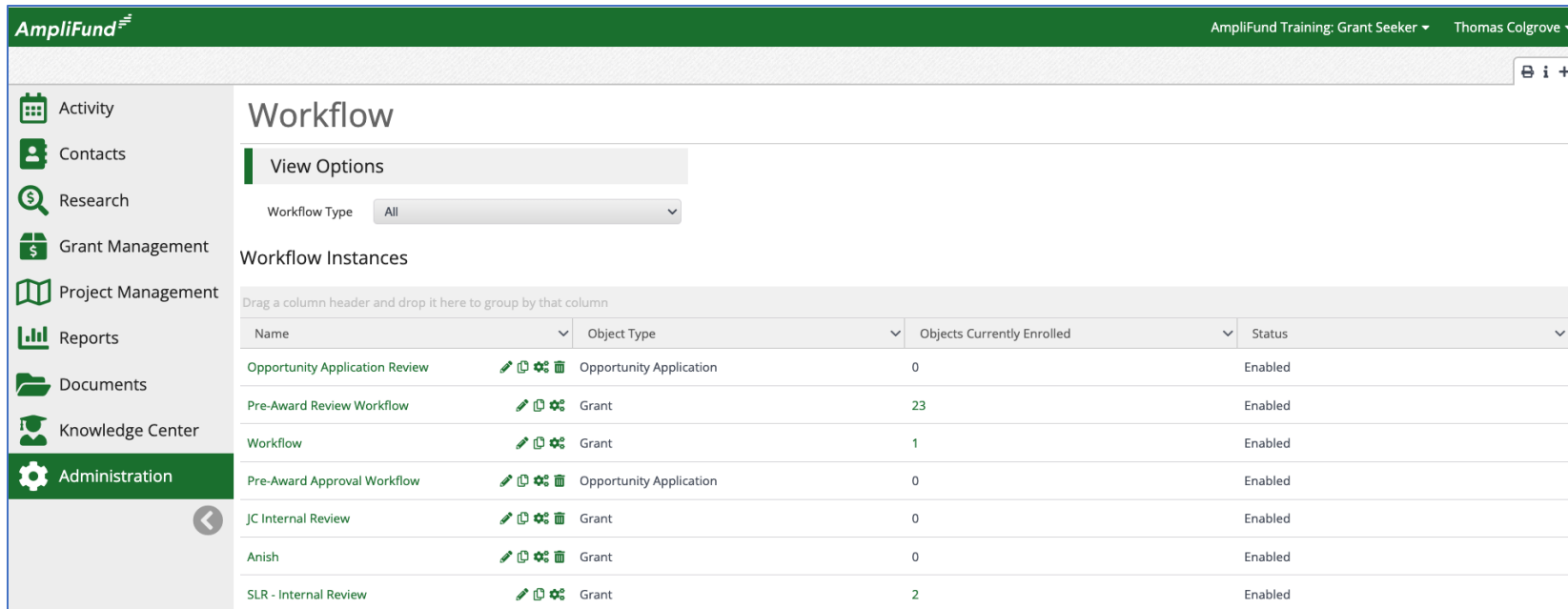
The screenshot shows the AmpliFund interface with the navigation menu on the left. The 'Administration' menu is expanded, showing 'System Administration' selected, which further expands to show 'Workflow'.

The main content area displays the 'Workflow' page. It includes a 'View Options' section with a 'Workflow Type' dropdown set to 'All'. Below this is a table titled 'Workflow Instances' with the following data:





























Name	Object Type	Objects Currently Enrolled	Status
Opportunity Application Review	Opportunity Application	0	Enabled
Pre-Award Review Workflow	Grant	23	Enabled
Workflow	Grant	1	Enabled
Pre-Award Approval Workflow	Opportunity Application	0	Enabled
JC Internal Review	Grant	0	Enabled
Anish	Grant	0	Enabled
SLR - Internal Review	Grant	2	Enabled

# Edit Workflows

- Click on the Workflow Name to access the Workflow details.
- Click on the pencil edit icon to edit the Workflow details.
- Click on the paper icon to copy the Workflow.
- Click on the gear icon to edit the Workflow Queue's and Action Items.
- Click on the trashcan icon to delete the Workflow.



The screenshot displays the AmpliFund Administration interface. The top navigation bar shows 'AmpliFund' and user information: 'AmpliFund Training: Grant Seeker' and 'Thomas Colgrove'. The left sidebar contains navigation icons for Activity, Contacts, Research, Grant Management, Project Management, Reports, Documents, Knowledge Center, and Administration (highlighted). The main content area is titled 'Workflow' and includes a 'View Options' section with a 'Workflow Type' dropdown set to 'All'. Below this is a 'Workflow Instances' table with a header for grouping columns.

Drag a column header and drop it here to group by that column				
Name		Object Type	Objects Currently Enrolled	Status
Opportunity Application Review	   	Opportunity Application	0	Enabled
Pre-Award Review Workflow	   	Grant	23	Enabled
Workflow	   	Grant	1	Enabled
Pre-Award Approval Workflow	   	Opportunity Application	0	Enabled
JC Internal Review	   	Grant	0	Enabled
Anish	   	Grant	0	Enabled
SLR - Internal Review	   	Grant	2	Enabled

# Create Workflows

# Create Workflows

- Click on the + icon on the top right of the screen.

**Workflow**

View Options

Workflow Type: All

**Workflow Instances**

Drag a column header and drop it here to group by that column

Name	Object Type	Objects Currently Enrolled	Status
Opportunity Application Review	Opportunity Application	0	Enabled
Pre-Award Review Workflow	Grant	23	Enabled
Workflow	Grant	1	Enabled
Pre-Award Approval Workflow	Opportunity Application	0	Enabled
JC Internal Review	Grant	0	Enabled
Anish	Grant	0	Enabled

# Workflow Details


- Select the Object Type.
  - Grant – Grants and Awards.
  - Opportunity – Applications.
- Enter the Name.
- Add a Description (Optional).

## Workflow Details

Object Type\*

Name\*

Description



# Workflow Notifications

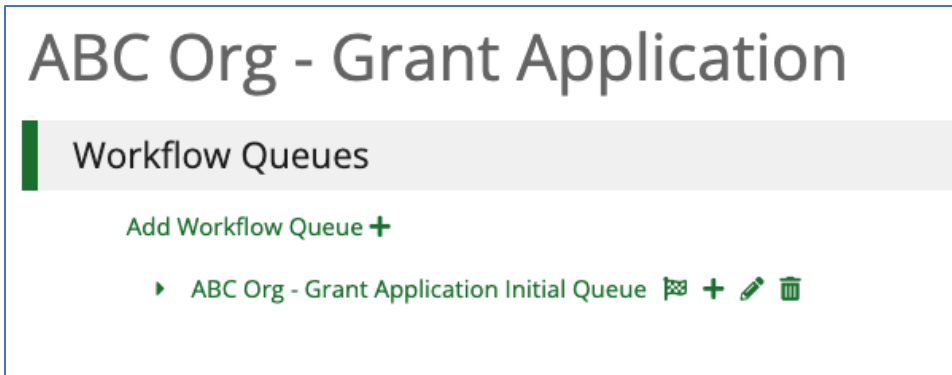
- Select Action Alerts.
  - Yes or No.
- If Yes, select Days Since Last Action.
  - If a record is stalled for x days the users below will be notified.
- If Yes, select the Users to be Notified.
- Click Save on the bottom right of the screen.

The screenshot displays the 'Notifications' configuration interface. It includes the following elements:

- Notifications** (Section Header)
- Action Alerts**: A dropdown menu set to 'Yes'.
- Days Since Last Action**: A dropdown menu set to '7'.
- Users**: A search input field containing 'Judy Test' and a magnifying glass icon, followed by an 'Add' button.
- Current Users**: A section for displaying selected users.
- Save** and **Cancel** buttons: Located at the bottom right of the screen, highlighted by a callout box.

# Add Workflow Queues

- Click the + icon next to Add Workflow Queue.
  - Enter the Name.
  - Add a Description (Optional).
  - Select Users (Must click Add next to User field).
    - Any Users assigned at the Queue level have access to all Action Items within the Queue.
  - Click Save on the bottom right of the screen.



New Queue

Workflow Queue Details

Name\*

Description

User Permissions

User  [Add]

Current Users

[Save] [Cancel]

# View, Edit, Delete Workflow Queues

- Click on the Workflow Queue to view the details.
- Click on the pencil edit icon to edit the details.
- Click on the trashcan icon to delete the Queue.

Add Workflow Queue +

▶ ABC Org - Grant Application Initial Queue

**ABC Org - Grant Application Initial Queue**

---

**Workflow Queue Details**

Name ABC Org - Grant Application Initial Queue

Description

---

**User Permissions**

Current Users

**ABC Org - Grant Application Initial Queue**

---

**Workflow Queue Details**

Name\*

Description

---

**User Permissions**

User

Current Users



# Add Workflow Action Items

- Click on the carrot dropdown to the left of Queue to see all Action Items within the Queue.
- Click on the + Icon next to the Queue
  - Enter the Name.
  - Add a Description (Optional).

## ABC Org - Grant Application

### Workflow Queues

Add Workflow Queue +

- ▼ ABC Org - Grant Application Initial Queue 🚩 + ✎ 🗑️
  - ✓ ⬆️ ABC Org - Grant Application Remove from workflow ✎ 🗑️
- ▶ Test + ✎ 🗑️

### Workflow Action Details

Name\*

Description

Action Type Add Attachment ▼

# Add Workflow Action Items

- Select the Action Type.
- Select Users (Must click Add next to User field).
  - Any Users assigned at the Action Item level only have access to that Action Item.
- Click Save on the bottom right of the screen.

**Workflow Action Details**

Name\*

Description

Action Type Add Attachment ▾

**User Permissions**

User

Current Users

# Workflow Action Types

## Grant Workflow

- Add Attachment.
- Complete Task.
- Send to Queue.
- Remove from Workflow.

**Workflow Action Details**

Name\*

Description

Action Type

- ✓ Add Attachment
- Complete Task
- Remove From Workflow
- Send To Queue

**User Permissions**

User

# Edit Workflow Queues and Action Items

- Click on the pencil icon to edit.
- Click on the trashcan icon to delete.
- For Action Items only, click on the arrows to reorder.

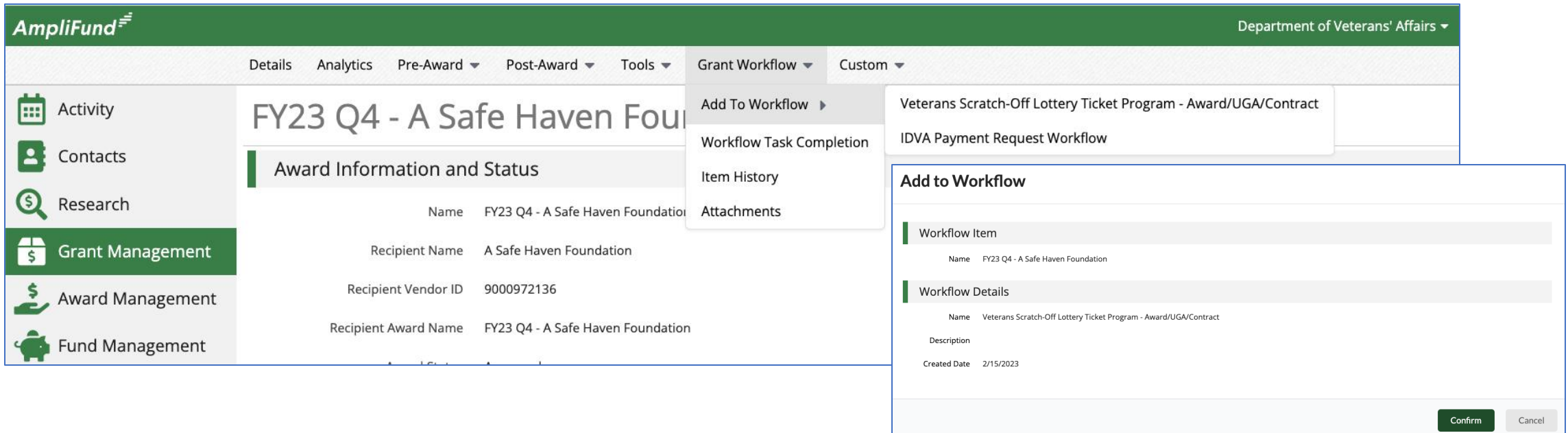
The screenshot shows a user interface for managing workflow queues. At the top, there is a header 'Workflow Queues' with a green vertical bar on the left. Below the header, there is a green button labeled 'Add Workflow Queue +'. Underneath, a dropdown menu is open, showing a list of workflow queues. Each queue has a status icon (a checkmark or a downward arrow), a name, and two action icons (a pencil for edit and a trash can for delete). The queues listed are:

- Initial Review for Completeness (status: checkmark) with edit and delete icons.
- Review Application (status: downward arrow) with edit and delete icons.
- Evaluate Application Reviews (status: checkmark) with edit and delete icons.
- Send to Scoring (status: checkmark) with edit and delete icons.
- Application Fail Review (status: checkmark) with edit and delete icons.
- Add Application Attachment (status: downward arrow) with edit and delete icons.

# Workflow Considerations

# Enroll Grant into Workflow

- Access the appropriate Grant.
- Click on Grant Workflow.
- Add the Grant to the appropriate Workflow.
- Confirm.



The screenshot displays the AmpliFund interface for the Department of Veterans' Affairs. The main content area shows the details for the grant 'FY23 Q4 - A Safe Haven Foundation'. A dropdown menu is open under 'Grant Workflow', with 'Add To Workflow' selected. This action has triggered a modal window titled 'Add to Workflow'.

**Grant Details:**

Award Information and Status	
Name	FY23 Q4 - A Safe Haven Foundation
Recipient Name	A Safe Haven Foundation
Recipient Vendor ID	9000972136
Recipient Award Name	FY23 Q4 - A Safe Haven Foundation

**Add to Workflow Modal:**

Workflow Item	
Name	FY23 Q4 - A Safe Haven Foundation
Workflow Details	
Name	Veterans Scratch-Off Lottery Ticket Program - Award/UGA/Contract
Description	
Created Date	2/15/2023

Buttons: Confirm, Cancel

# Move Records Through Workflow

- From the Workflow tab click on the appropriate Action Item.

The screenshot displays the AmpliFund web application interface. On the left is a navigation sidebar with icons for Activity, Contacts, Research, Grant Management (highlighted), and Award Management. The main content area shows the 'Grant Workflow' tab selected, with a dropdown menu open showing 'Available Actions' containing 'Generate UGA in AmpliFund', 'Upload Signed UGA', and 'Send to Fiscal Review'. The background shows 'Award Information and Status' for 'FY23 Q4 - A Safe Haven Foundation' with fields for Name, Recipient Name, Recipient Vendor ID, and Recipient Award Name.

**Generate UGA in AmpliFund**

FY23 Q4 - A Safe Haven Foundation

**Task Details**

Name: Generate UGA in AmpliFund

Description:

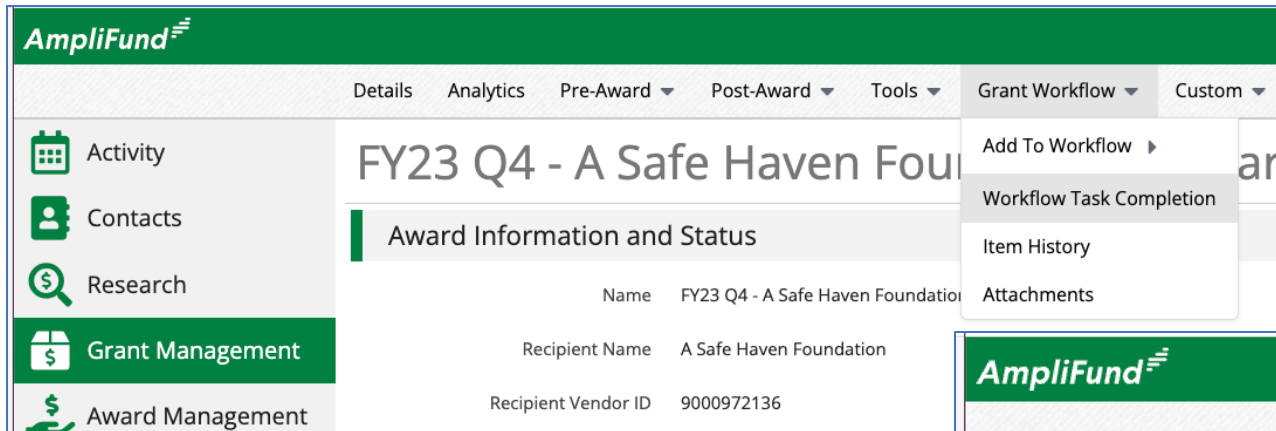
**Completion Details**

Is Complete:  ▾

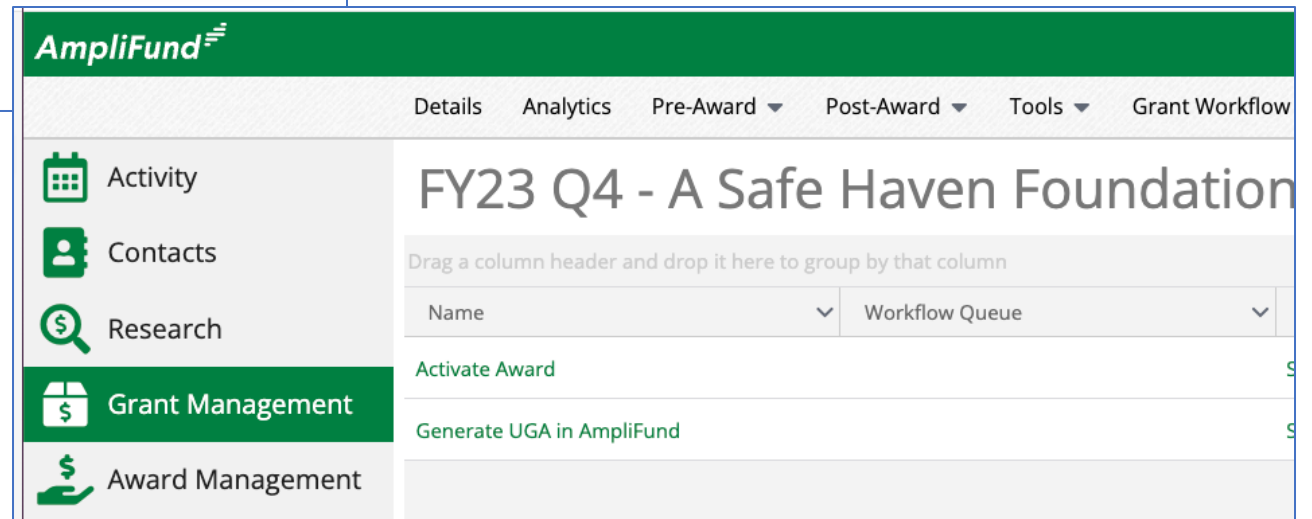
Comments:

# Task Completion

- Click on the Workflow or Grant Workflow > Workflow Task Completion to see all completed Task Action Types.



The screenshot shows the AmpliFund interface with the 'Grant Workflow' menu open. The main header is green with the AmpliFund logo. Below the header, there are navigation tabs: Details, Analytics, Pre-Award, Post-Award, Tools, Grant Workflow, and Custom. The 'Grant Workflow' menu is open, showing options: Add To Workflow, Workflow Task Completion, Item History, and Attachments. The main content area displays 'FY23 Q4 - A Safe Haven Foundation' and 'Award Information and Status' with fields for Name, Recipient Name, and Recipient Vendor ID.



The screenshot shows the AmpliFund interface with the 'Workflow Task Completion' view open. The main header is green with the AmpliFund logo. Below the header, there are navigation tabs: Details, Analytics, Pre-Award, Post-Award, Tools, and Grant Workflow. The 'Grant Workflow' menu is open, showing options: Add To Workflow, Workflow Task Completion, Item History, and Attachments. The main content area displays 'FY23 Q4 - A Safe Haven Foundation' and a table with columns for Name and Workflow Queue. The table contains two rows of data: 'Activate Award' and 'Generate UGA in AmpliFund'.



# Item History

- Click on the Workflow or Grant Workflow > Item History to see all completed items.

The screenshot shows the Amplifund interface with a sidebar on the left containing 'Activity', 'Contacts', 'Research', and 'Grant Management'. The main content area displays 'FY23 Q4 - A Safe Haven Foundation' with 'Award Information and Status' and 'Recipient Name: A Safe Haven Foundation'. A 'Grant Workflow' dropdown menu is open, showing options: 'Add To Workflow', 'Workflow Task Completion', 'Item History', and 'Attachments'. Below the menu, a table displays the item history.

Workflow Queue	Workflow Action	Text	User	Created Date
Create Contract	Exit Workflow	'FY23 Q4 - A Safe Haven Foundation' (2983) - Exited Workflow Instance 'Veterans Scratch-Off Lottery Ticket Program - Award/UGA/Contract' (411)	tcolgrove@amplifund.com	5/21/2024 10:33 AM
Fiscal Review	Send to Create Contract	'FY23 Q4 - A Safe Haven Foundation' (2983) - Sent to Queue 'Create Contract' (5314)	tcolgrove@amplifund.com	5/21/2024 10:32 AM
Generate Uniform Grant Agreement	Send to Fiscal Review	'FY23 Q4 - A Safe Haven Foundation' (2983) - Sent to Queue 'Fiscal Review' (4029)	tcolgrove@amplifund.com	5/21/2024 10:32 AM
Generate Uniform Grant Agreement	Exit Workflow	'FY23 Q4 - A Safe Haven Foundation' (2983) - Added to Workflow Instance 'Veterans Scratch-Off Lottery Ticket Program - Award/UGA/Contract' (411)	tcolgrove@amplifund.com	5/21/2024 10:31 AM

# Access Workflows

- Click on Administration > System Administration > Workflows.
- Click on the number in the Objects Currently Enrolled.

The screenshot shows the AmpliFund interface with the following components:

- Navigation Menu (Left):** Documents, Knowledge Center, Administration (selected), License Information, System Administration (selected), Workflow, Activity Log, System Security, Lists, Actuals, Custom, Favorites, Views.
- Main Content Area (Top):** A table with columns for Name, Objects Currently Enrolled, and a status column. The table contains the following data:
 

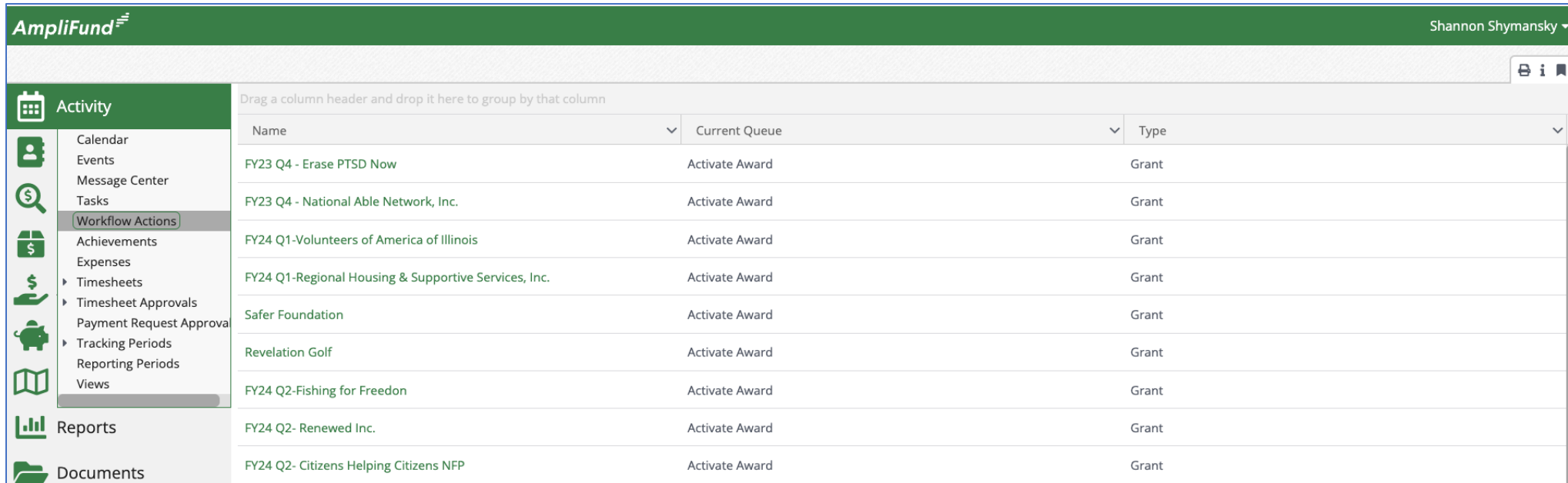
Name	Objects Currently Enrolled	Status
12	13	
19	20	
- Workflow Detail View (Bottom):** Shows the 'Workflow' page for 'Veterans Scratch-Off Lottery Ticket Program - Award/UGA/Contract - Enrolled Objects'. It includes a 'View Options' section with 'Workflow Type' set to 'All' and a table of 'Workflow Instances'.
 

Name	Object Type	Objects Currently Enrolled	Status
Opportunity Application Review	Opportunity Application	0	
Pre-Award Review Workflow	Grant	23	Enabled
Workflow	Grant	1	Enabled
Pre-Award Approval Workflow	Opportunity Application	0	Enabled
JC Internal Review	Grant	0	Enabled
Anish	Grant	0	Enabled
SLR - Internal Review	Grant	2	Enabled
- Grant Object List (Right):** A table titled 'Veterans Scratch-Off Lottery Ticket Program - Award/UGA/Contract - Enrolled Objects' with columns for Grant Name, Date Entered, and Current Queue.
 

Grant Name	Date Entered	Current Queue
FY23 Q4 - Erase PTSD Now	12/29/2023	Activate Award
FY23 Q4 - National Able Network, Inc.	12/29/2023	Activate Award
FY24 Q1-Volunteers of America of Illinois	03/22/2024	Activate Award
FY24 Q1-Regional Housing & Supportive Services, Inc.	01/16/2024	Activate Award
Safer Foundation	03/22/2024	Activate Award
Revelation Golf	03/22/2024	Activate Award
FY24 Q2-Fishing for Freedom	03/19/2024	Activate Award
FY24 Q2- Renewed Inc.	03/22/2024	Activate Award
FY24 Q2- Citizens Helping Citizens NFP	03/28/2024	Activate Award
FY24 Q2- Guardian Corps of America	04/04/2024	Activate Award
FY24 Q2- Code Platoon	03/28/2024	Activate Award

# Access Workflow Actions from the Activity Center

- Click on Activity > Workflow Actions to see all objects enrolled in Workflow Queue's and Action Items you are responsible for.



The screenshot shows the AmpliFund Activity Center interface. The top navigation bar includes the AmpliFund logo and the user name Shannon Shymansky. The left sidebar contains a menu with categories: Activity, Reports, and Documents. Under the Activity category, the 'Workflow Actions' option is selected. The main content area displays a table with the following data:

Drag a column header and drop it here to group by that column		
Name	Current Queue	Type
FY23 Q4 - Erase PTSD Now	Activate Award	Grant
FY23 Q4 - National Able Network, Inc.	Activate Award	Grant
FY24 Q1-Volunteers of America of Illinois	Activate Award	Grant
FY24 Q1-Regional Housing & Supportive Services, Inc.	Activate Award	Grant
Safer Foundation	Activate Award	Grant
Revelation Golf	Activate Award	Grant
FY24 Q2-Fishing for Freedom	Activate Award	Grant
FY24 Q2- Renewed Inc.	Activate Award	Grant
FY24 Q2- Citizens Helping Citizens NFP	Activate Award	Grant

# In-Product Demo

# Next Steps

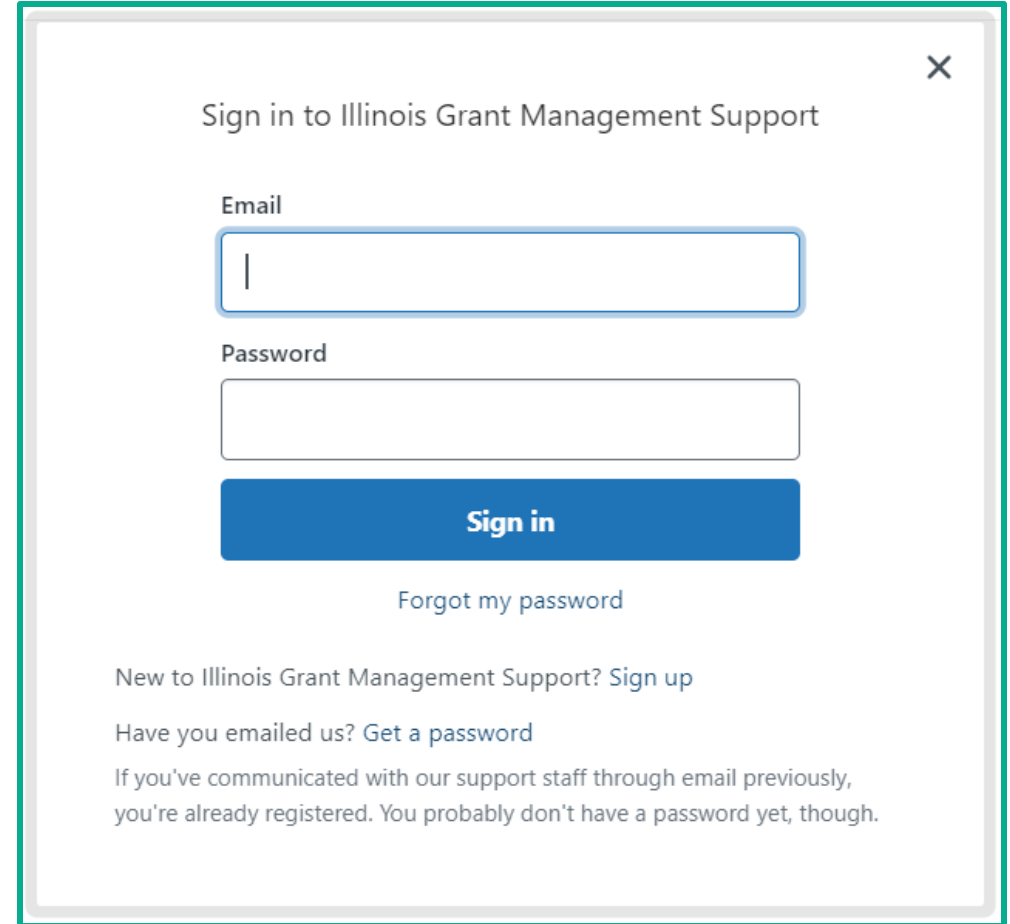
# Next Steps

- Recreate the Workflow from today's session.
- Think of how you might use AmpliFund Project Functionality.
  - 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.

# Customer Support

# Create AmpliFund Support Account

1. Access the appropriate support site.
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](mailto: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](mailto:support@amplifund.zendesk.com).

Illinois - [support@il-amplifund.zendesk.com](mailto:support@il-amplifund.zendesk.com).

Nebraska - [support@ne-amplifund.zendesk.com](mailto:support@ne-amplifund.zendesk.com).

## Visit Support Portal:

Commercial - <https://amplifund.zendesk.com>.

Illinois - <https://il-amplifund.zendesk.com>.

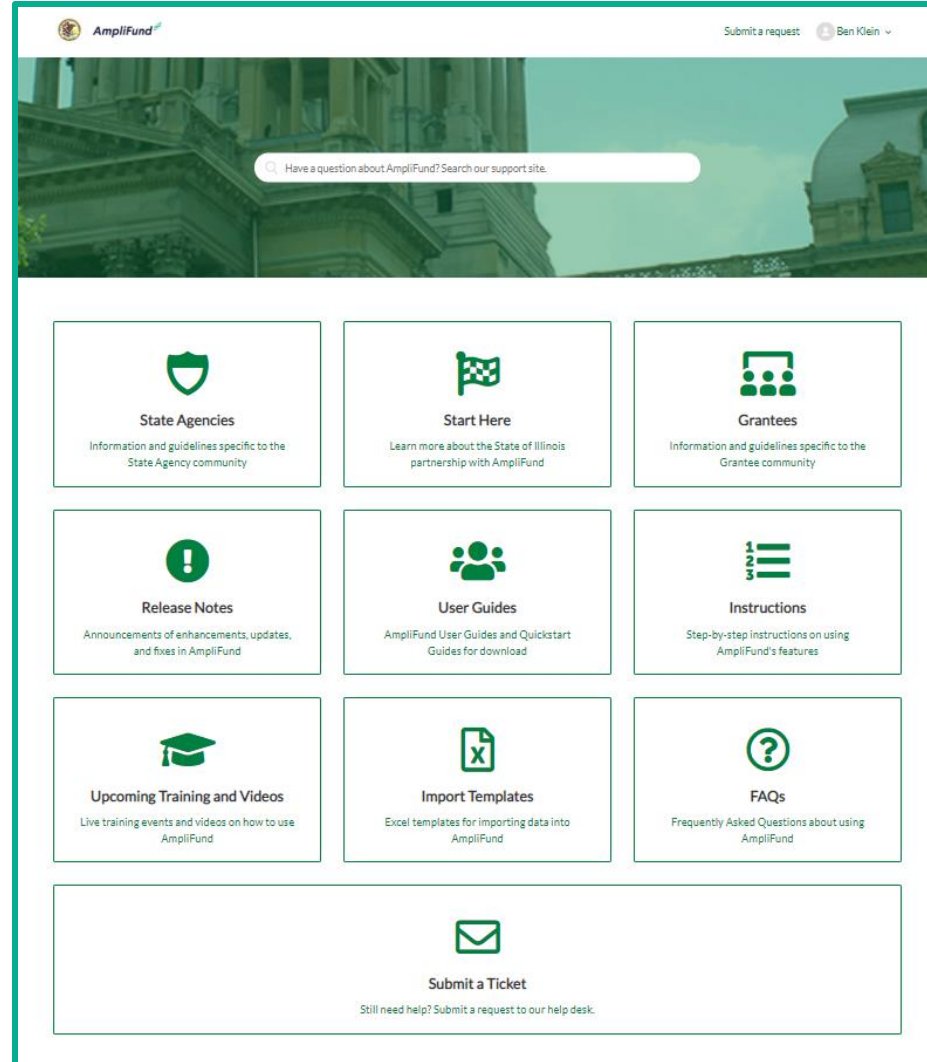
Nebraska - <https://ne-amplifund.zendesk.com>.

## Production Site:

Commercial - <https://www.gotomygrants.com>.

Illinois - <https://il.amplifund.com>.

Nebraska - <https://ne.amplifund.com>.



# Question & Answer