




AmpliFund 



Grant Seeker Core Series

Projects

Core Series Overview

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

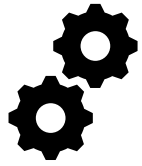
Agenda

Today's Session

- What Are Projects
- Project Use Cases
- In-Product Demo
 - Access Projects
 - Create Project
 - Create Project Budget
 - Create Project Performance Plan
 - Project Budget Report
- Next Steps
- Customer Support
- Question & Answer

What Are Projects

Project Use & Features



Use:

- Link one or more grants to a Project
- Segment a grant into multiple Projects



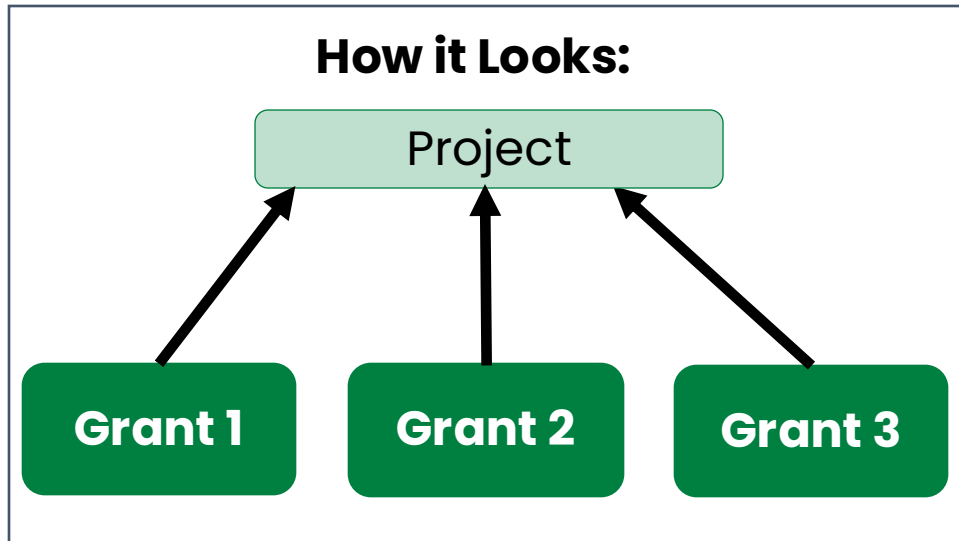
Features:

- Plan & track project performance
- Plan & track project budgets



Project Use Cases

Use 1: Multiple Grants = One Project

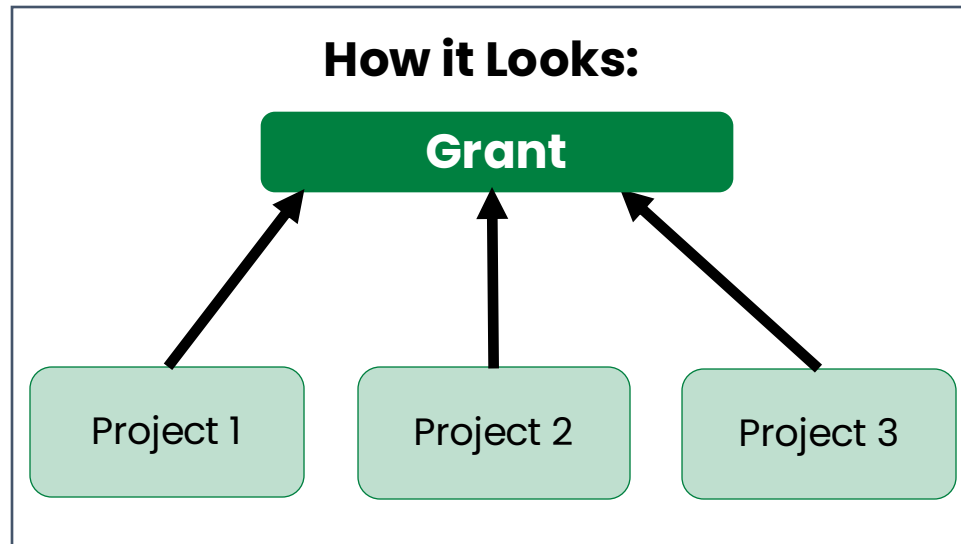


Use Project to:

- Link grants for separate issues/initiatives
- Link grants for different locations
- Link grants for different years
- Separate a grant by year
 - If full budget is not known upfront
 - Award amount changes by year

Multiple sources of funding for one initiative

Use 2: Multiple Projects = One Grant



Use Project to:

- Breakout numerous initiatives under 1 grant
- Breakout locations supported by 1 grant

One source of funding for multiple initiatives or locations

Access Projects

Access Projects

- Click Project Management > Projects.
- Land on a list of all Projects in your account.

The screenshot shows the AmpliFund dashboard with a green header. On the left, a navigation menu is visible with the following items: Activity, Contacts, Research, Grant Management, Award Management, Fund Management, Project Management (highlighted), Reports, Documents, Knowledge Center, and Administration. Under Project Management, 'Projects' is selected. The main area displays a calendar for May 2024 with a legend for 'Past Due' (red), 'Complete' (grey), and 'Due' (green). The calendar shows dates from Sun 28 to Thu 2.

The screenshot shows the AmpliFund Projects list view. The header includes the AmpliFund logo, user information 'AmpliFund Training: Grant Seeker' and 'Thomas Colgrove', and a toolbar with icons for search, info, and zoom. The table below lists various projects with columns for Name, Project Manager, Budgeted Amount, Start Date, End Date, and Status.

Name	Project Manager	Budgeted Amount	Start Date	End Date	Status
City Infrastructure Improvement	Jared Vail	\$2,500,000.00	1/1/2020	12/31/2022	Enabled
Walkability 2020	Elijah Miami	\$25,000.00	11/6/2017	11/6/2022	Enabled
Education Improvement	Elijah Miami	\$5,000,000.00	1/1/2022	12/31/2024	Enabled
Care Project	Edwin Tallahassee	\$10,000.00	7/1/2016	10/30/2018	Enabled
Walkability Testing	Edwin Tallahassee	\$20,000.00	5/1/2018	5/1/2022	Enabled
Upward Bound	Trena Pasadena	\$100,000.00	1/1/2016	1/31/2020	Enabled
Cinnaire - Example Program Setup	Brad Mills	\$500,000.00	2/3/2020	2/3/2021	Enabled
HK Project 1	Andrew Brooks	\$10,000.00	1/1/2021	12/31/2021	Enabled
HK 2	Andrew Brooks	\$10,000.00	1/1/2021	12/31/2021	Enabled
Fire Prevention	Anna Keadrick	\$75,000.00	1/1/2022	12/31/2022	Enabled

Create Projects

Create Projects

- Click on the + icon on the top right of the screen.
- Click on the pencil icon to edit.
- Click on the paper icon to copy.
- Click on the trashcan icon to delete.

AmpliFund Training: Grant Seeker Thomas Colgrove



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

Name	Project Manager	Budgeted Amount	Start Date	End Date	Status
City Infrastructure Improvement	Jared Vail	\$2,500,000.00	1/1/2020	12/31/2022	Enabled
Walkability 2020	Elijah Miami	\$25,000.00	11/6/2017	11/6/2022	Enabled
Education Improvement	Elijah Miami	\$5,000,000.00	1/1/2022	12/31/2024	Enabled
Care Project	Edwin Tallahassee	\$10,000.00	7/1/2016	10/30/2018	Enabled
Walkability Testing	Edwin Tallahassee	\$20,000.00	5/1/2018	5/1/2022	Enabled
Upward Bound	Trena Pasadena	\$100,000.00	1/1/2016	1/31/2020	Enabled
Cinnaire - Example Program Setup	Brad Mills	\$500,000.00	2/3/2020	2/3/2021	Enabled
HK Project 1	Andrew Brooks	\$10,000.00	1/1/2021	12/31/2021	Enabled
HK 2	Andrew Brooks	\$10,000.00	1/1/2021	12/31/2021	Enabled
Fire Prevention	Anna Kendrick	\$75,000.00	1/1/2022	12/31/2022	Enabled

Configure Project Details – Project Information

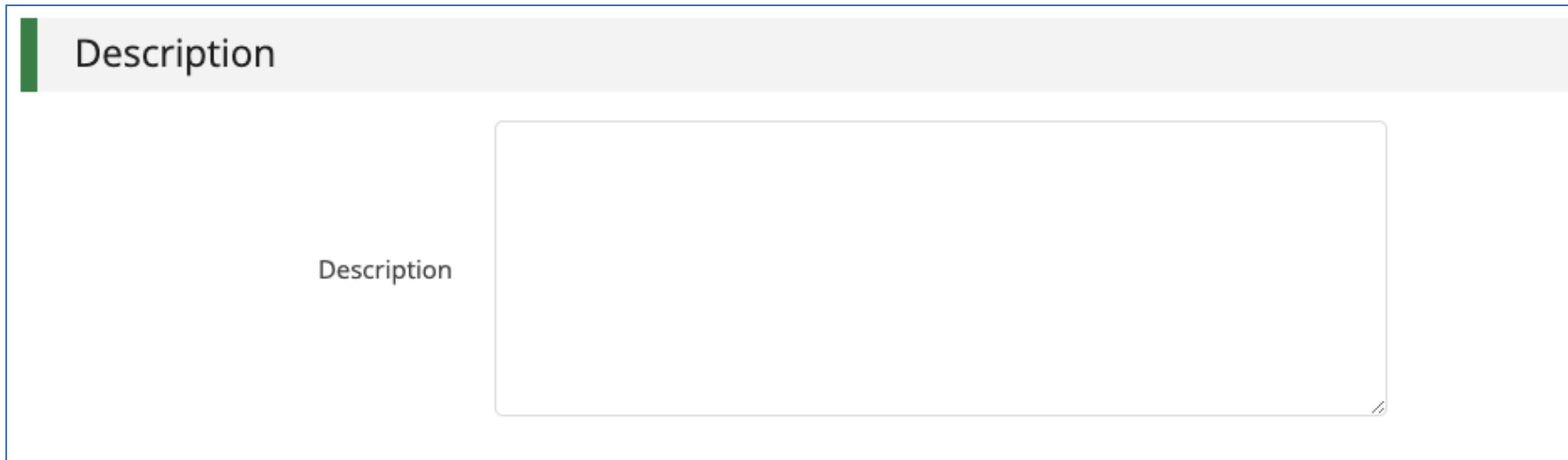
- Enter Name.
- Enter Start Date.
- Enter End Date.
- Enter Budgeted Amount.
- Select Project Manager.
- Add Additional Staff (Optional).
- Add Departments (Optional).
- Add Subjects (Optional).
- Select Grants (Optional).

Project Information

Name*	<input type="text"/>
Start Date*	<input type="text" value="MM/DD/YYYY"/>  <small>This field is required.</small>
End Date*	<input type="text" value="MM/DD/YYYY"/>  <small>This field is required.</small>
Budgeted Amount	<input type="text" value="\$0.00"/>
Project Manager*	<input type="text" value="Select project manager..."/>
Additional Staff	<input type="text" value="Select additional staff..."/>
Department(s) or Program(s)	<input type="text" value="Select departments..."/>
Subjects	<input type="text" value="Select subjects..."/>
Grant(s)	<input type="text" value="Select grants..."/>

Configure Project Details – Description

- Add Description (Optional).



The screenshot shows a web form for configuring project details. At the top, there is a light gray header bar with the word "Description" in a dark font. Below the header bar, there is a large, empty text input area with a thin gray border. The word "Description" is centered within this input area, serving as a placeholder. The entire form is enclosed in a thin blue border.

Configure Project Details – Task Reminders

- Configure Task Reminders (Optional).

Default Settings for Sending Task Reminders

Default Task Reminders

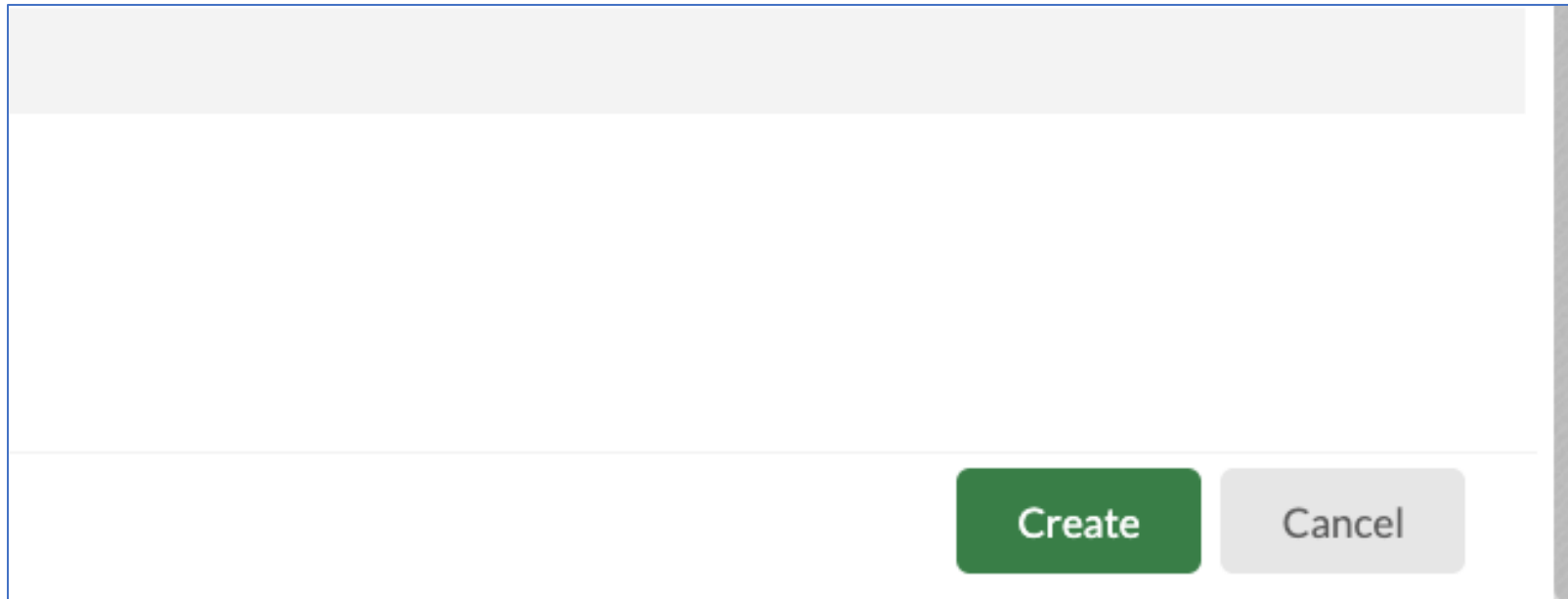
Reminder 1
0 days before due ▼

Reminder 2
0 days before due ▼

Reminder 3
0 days before due ▼

Create Project

- Click Create on the bottom right of the screen.



Create Project Budget

Add Project Budget Line Items

- Click on Planning > Budget.
- Click on the + icon on the top right of the screen to add a Project Budget Line Item.

The screenshot displays the AmpliFund application interface. At the top, the AmpliFund logo is visible in a green header. Below the header, there is a navigation bar with tabs for 'Details', 'Planning', 'Tools', and 'Custom'. The 'Planning' tab is selected, and a dropdown menu is open, showing options for 'Budget', 'Performance Goals', and 'Performance Strategies'. The 'Budget' option is highlighted. In the background, a project detail view is visible, showing the project name 'Training: Grant Seeker' and the user 'Thomas Colgrove'. Below this, there is a table with columns for 'Name' and 'Test P'. A floating action button (FAB) with a plus sign (+) is located in the bottom right corner of the project detail view, indicating where to click to add a new budget line item.

Configure Project Budget Line Item

- Select Item Type.
- Select Category.
- Enter Name.
- Enter Description (Optional).
- Enter Budgeted Amount.
- Select Responsible Individual.
- Click Create on the bottom right of the screen.

Create Budget Item

Line Item Information

Item Type

Category

Name*

Description

Budgeted Amount*

Responsible Individual*

Add Project Budget Line Item to Grant

- Click on Project Management > Projects > Select the appropriate Project.
- Land on the Project Details Page.
- Select the appropriate Grant from the Project Information section.
- Land on the Grant Details page.

Test Project 1

Project Information

Name	Test Project 1
Start Date	7/1/2024
End Date	6/30/2025
Project Manager	Admin User
Additional Staff	Core Series, Core Series User - TC
Department(s) or Program(s)	
Subject(s)	
Budgeted Amount	\$100,000.00
Allocated Amount	\$20,000.00
Funded Amount	\$200,000.00
Grants	2024 Core Series Grant Seeker - TC , 2024 May Grant Seeker Core Series

Access Grant Budget

- Click on Post-Award > Financial > Budget.
- Land on Grant Budget.
- Configure Budget View Settings.

The screenshot shows the AmpliFund software interface. The top navigation bar includes 'Details', 'Analytics', 'Pre-Award', 'Post-Award', 'Tools', and 'Grant Workflow'. The 'Post-Award' menu is open, showing 'Financial', 'Performance', 'Cash Flow', 'Management', and 'Settings'. The 'Financial' menu is further open, showing 'Budget' and 'Expenses'. The 'Budget' option is selected, leading to the '2024 Core Series Grant Seeker - TC - Budget' page.

The 'Budget View Settings' section includes 'Show Actuals From' (1/1/2024) and 'To' (12/31/2024). The 'View By' section has 'Category' selected. The 'Options' section includes checkboxes for 'Project', 'Grant Year', 'Line Items', 'Responsible Individuals', 'GL Accounts', 'Match', 'Actuals', and 'Remaining'. The 'Budget' table is displayed below.

Expense Budget +	Project	Grant-Funded Budgeted	Total Budgeted
Construction +			
Construction 1		\$20,000.00	\$20,000.00
Construction 2		\$30,000.00	\$30,000.00
Subtotal		\$50,000.00	\$50,000.00

Add Project Budget Line Item to Grant

- Click on the + icon next to the appropriate Category to add a new Line Item.
- Configure the Project Line Item field to link the Line Item to the Project.
- Click on the pencil edit icon to add the Project Line Item to an existing Grant Line Item

Create Budget Item

General Financials Purpose Areas Configuration Attachments

Item Type:

Category:

Name *

Direct Cost *

Exclude From Match

Responsible Type:

Responsible Individual *

Project Line Item

Create Project Performance Plan

Add Project Strategies

- Click on Planning > Performance Strategies.
- Click on the + icon on the top right of the screen to add a Project Strategy.

The screenshot displays the AmpliFund web application interface. At the top, the AmpliFund logo is visible in the green header. Below the header, there are navigation tabs: 'Details', 'Planning', 'Tools', and 'Custom'. The 'Planning' tab is selected, and a dropdown menu is open, showing options: 'Budget', 'Performance Goals', and 'Performance Strategies'. The 'Performance Strategies' option is highlighted. On the left side, there is a sidebar with icons for 'Activity', 'Contacts', 'Research', and 'Grant Management'. In the main content area, a project card is visible with the following details:

Name	Test Project 1
Start Date	7/1/2024

Below the project card, there is a green header for 'AmpliFund Training: Grant Seeker' and 'Thomas Colgrove'. In the bottom right corner of the project card area, there are icons for print, information, add, and bookmark.

Configure Project Strategy

- Enter Name.
- Enter Description (Optional).
- Click Create on the bottom right of the screen.

Create Strategy

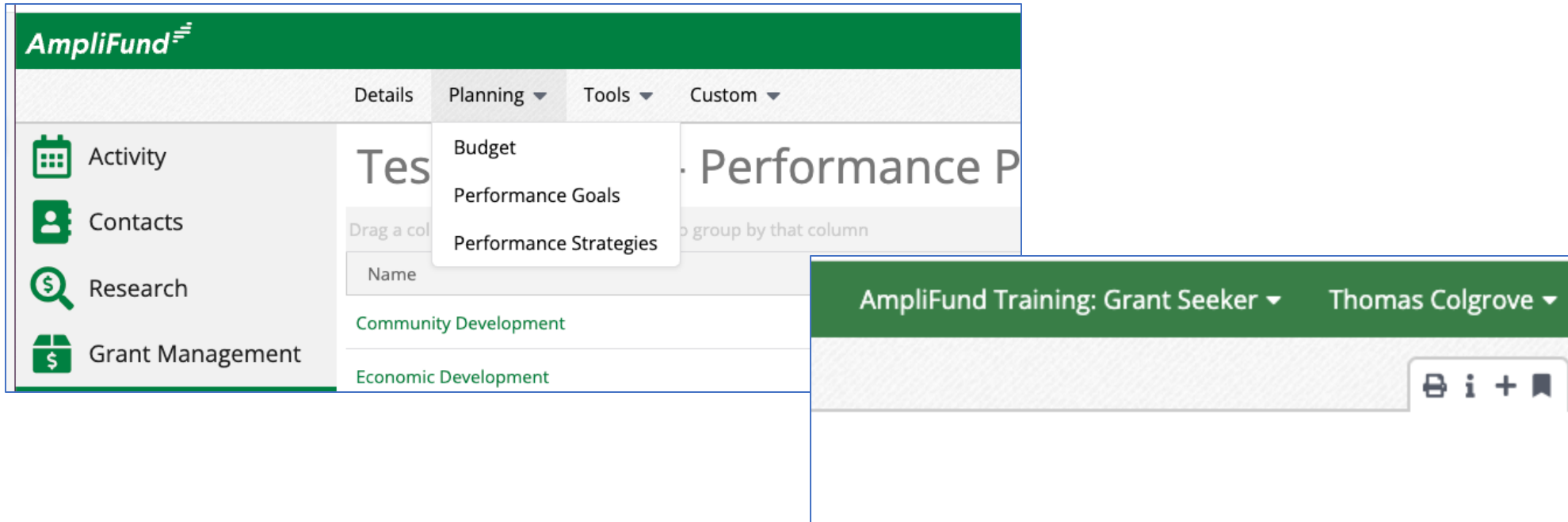
Strategy Information

Name*

Description

Add Project Performance Plan Goals

- Click on Planning > Performance Plan Goals.
- Click on the + icon on the top right of the screen to add a Project Performance Plan Goal.



The screenshot displays the AmpliFund web application interface. At the top, the AmpliFund logo is visible. Below it, a navigation bar contains tabs for 'Details', 'Planning', 'Tools', and 'Custom'. The 'Planning' tab is selected, and a dropdown menu is open, showing options for 'Budget', 'Performance Goals', and 'Performance Strategies'. The 'Performance Goals' option is highlighted. On the left side, there is a sidebar with icons and labels for 'Activity', 'Contacts', 'Research', and 'Grant Management'. The main content area shows a table with columns for 'Name', 'Community Development', and 'Economic Development'. A modal window is open in the foreground, displaying the user's name 'Thomas Colgrove' and the current page title 'AmpliFund Training: Grant Seeker'. The modal also features a '+ icon' for adding new items.

Configure Project Performance Plan Goal

- Select Strategy (Optional).
- Select Goal Type.
- Enter Name.
- Enter Description (Optional).

Create Goal

Goal Information

Strategy

Goal Type

Name*

Description

Responsible Individual*

Add Project Performance Plan Goal to Grant

- Click on Project Management > Projects > Select the appropriate Project.
- Land on the Project Details Page.
- Select the appropriate Grant from the Project Information section.
- Land on the Grant Details page.

Test Project 1

Project Information

Name	Test Project 1
Start Date	7/1/2024
End Date	6/30/2025
Project Manager	Admin User
Additional Staff	Core Series, Core Series User - TC
Department(s) or Program(s)	
Subject(s)	
Budgeted Amount	\$100,000.00
Allocated Amount	\$20,000.00
Funded Amount	\$200,000.00
Grants	2024 Core Series Grant Seeker - TC , 2024 May Grant Seeker Core Series

Access Grant Performance Plan

- Click on Post-Award > Performance > Performance Plan.
- Land on Post-Award Performance Plan.

The screenshot illustrates the navigation process within the AmpliFund system. The top navigation bar includes tabs for Details, Analytics, Pre-Award, Post-Award, Tools, Grant Workflow, and Custom. The left sidebar contains icons for Activity, Contacts, Research, Grant Management, and Project Management. The main content area shows the 'September - Grant Seeker Core Series' page with a dropdown menu open under 'Post-Award' > 'Performance' > 'Performance Plan'.

The second screenshot shows the 'September - Grant Seeker Core Series - Performance' page. It features a table with the following data:

Name	Goal Type	Responsible Individual
Monthly Narrative Report	Narrative	Emily Example
Monthly Numeric	Numeric	Admin User
Grant Seeker Project Goal	Numeric	Admin User

Add Project Performance Plan Goal to Grant

- Click on the + icon on the top right of the screen to add a new Performance Plan Goal.
- Configure the Project Field to link the Performance Plan Goal to the Project.
- Click on the pencil edit icon to add the Project Performance Plan Goal to an existing Grant Performance Plan Goal

Create Performance Item

General | Attachments

Strategy: No Strategy

Goal Type: Milestone

Name*: Test

Description: Test

Responsible Type: Individual

Responsible Individual*: Admin User

Project Goal: None

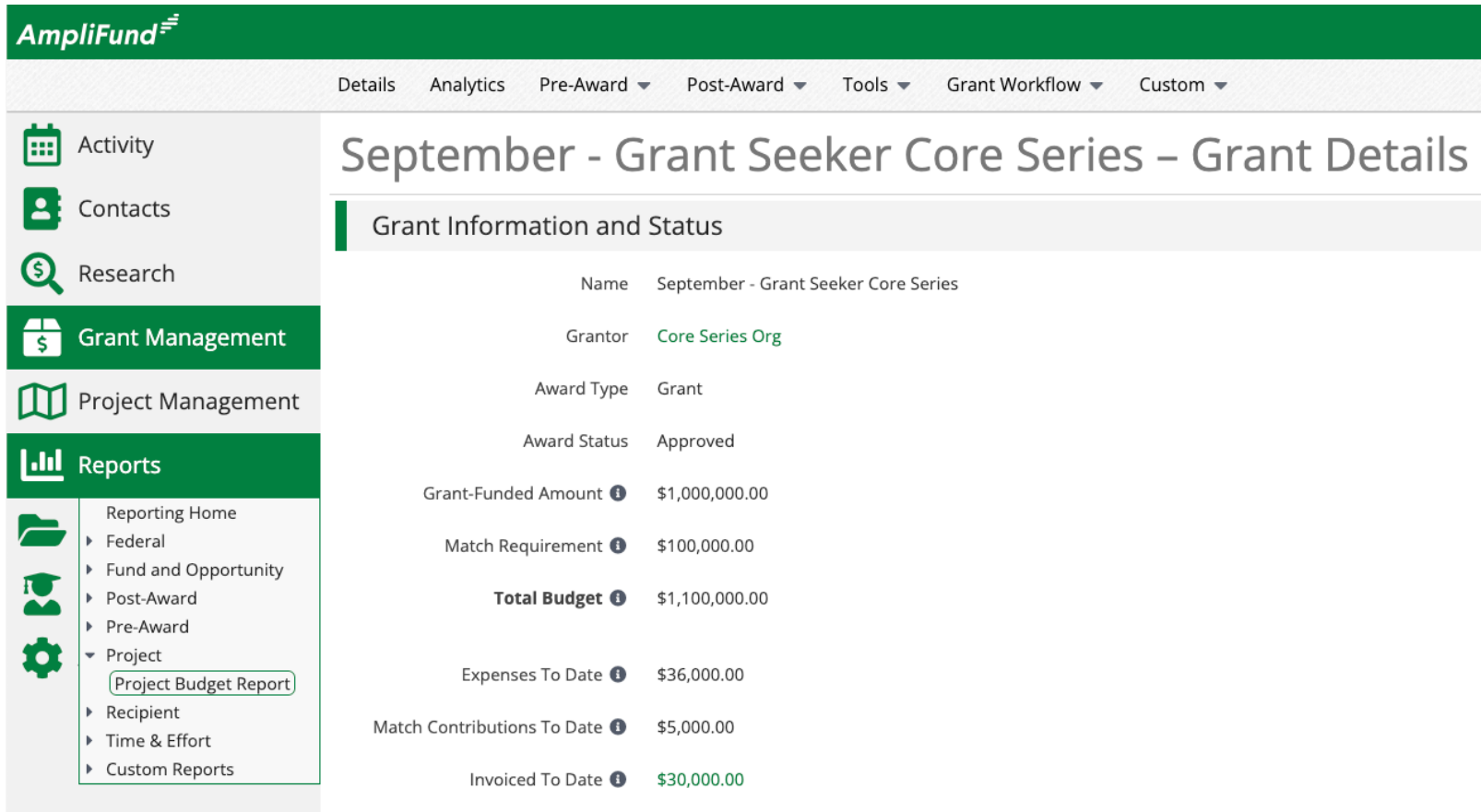
Due Date*: MM/DD/YYYY

Create Cancel

Project Budget Report

Access Project Budget Report

Click on Reports > Project > Project Budget Report.



The screenshot displays the AmpliFund web application interface. The top navigation bar includes the AmpliFund logo and a menu with options: Details, Analytics, Pre-Award, Post-Award, Tools, Grant Workflow, and Custom. The left sidebar contains a navigation menu with icons and labels for Activity, Contacts, Research, Grant Management, Project Management, and Reports. The Reports section is expanded, showing a list of report categories: Reporting Home, Federal, Fund and Opportunity, Post-Award, Pre-Award, Project, Recipient, Time & Effort, and Custom Reports. The 'Project Budget Report' is highlighted within the Project category.

September - Grant Seeker Core Series – Grant Details

Grant Information and Status

Name	September - Grant Seeker Core Series
Grantor	Core Series Org
Award Type	Grant
Award Status	Approved
Grant-Funded Amount	\$1,000,000.00
Match Requirement	\$100,000.00
Total Budget	\$1,100,000.00
Expenses To Date	\$36,000.00
Match Contributions To Date	\$5,000.00
Invoiced To Date	\$30,000.00

Configure Report Filters and Export

- Configure the Filters on the right side of the screen.
- Export the report as needed.

AmpliFund Training: Grant Seeker Thomas Colgrove

Activity
Contacts
Research
Grant Management
Project Management
Reports
Documents
Knowledge Center
Administration

Project Budget Report

Export PDF

1 / 23 Find...

Project Budget Report

Upward Bound
Project Period: 01/01/2016 - 01/31/2020
Total Budgeted: \$100,000.00
Total Actual: \$7,100.01

Project Line Items

Grant Line

Filters

Project All
Grant All

Sorts

Projects.Id
Project Budget Items.Id
GrantBudgetItems.Id

Columns

Column A
Column B
Column C
Column D
Column E
Column F
Column G
Column H
Column I
Column J

Project Line Item	Responsible Individual	Start Date	End Date
example 1	Andrew Brooks	01/01/2016	01/31/2020

Grant	Category	Line Item	Responsible Individual

In-Product Demo

Next Steps

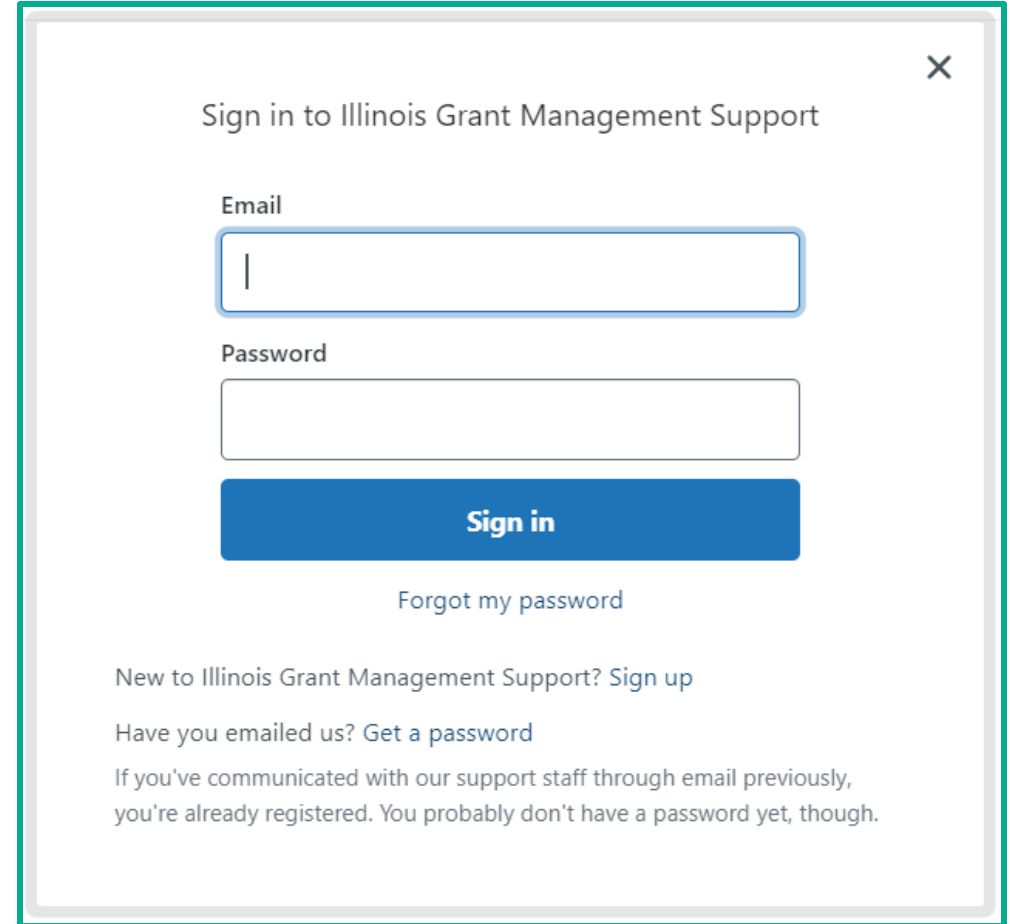
Next Steps

- Think about how you can use Projects.
- Save or favorite the Customer Support Site links.
- Follow the Release Notes to stay up to date on product releases.

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 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.

Visit Support Portal:

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

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

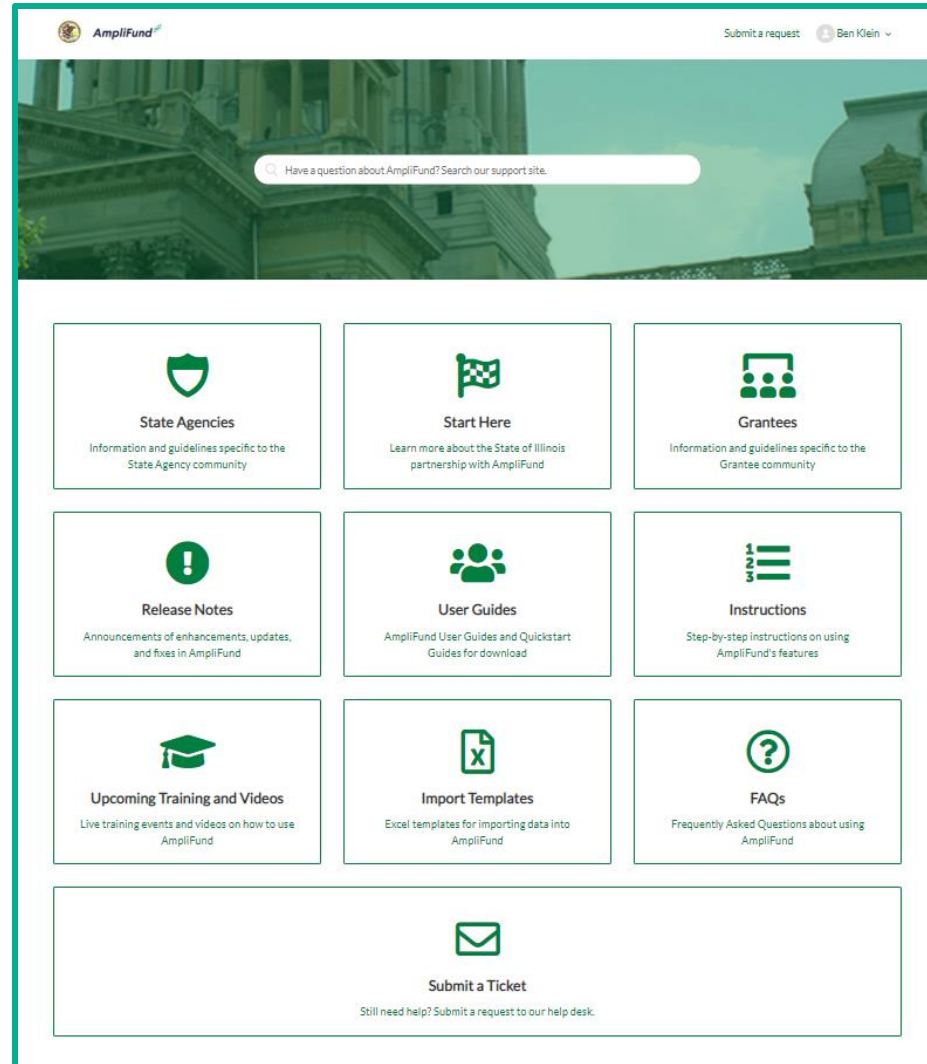
Nebraska - <https://ne-amplifund.zendesk.com>.

Production Site:

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

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

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



Question & Answer