



AmpliFund 



DNR OSLAD Grantee Training

October 05, 2023

Agenda

- DNR Introductions
- AmpliFund Introductions
- Log Into AmpliFund
- AmpliFund Navigation
- Adding Users
- Grant Details
- Performance Plan and Achievements
- Reporting Periods
- AmpliFund Tools
- In-Product Demo
- Customer Support

DNR Introductions

AmpliFund Introductions

Log Into AmpliFund

Log Into AmpliFund

Production URL: <https://il.amplifund.com>

Log Into AmpliFund

- Open the link above
- Select the Public Account option
- Enter your public.external.illinois.gov email and password



****Create an AmpliFund bookmark/favorites folder***



The image shows two screenshots of the ILLINOIS.gov Authentication Portal. The top screenshot displays the portal header and three account options: Public Account, Partner Account, and Employee Account. The bottom screenshot shows the login form for a Public account, with a text input field containing the email 'kcolgrove@public.external.illinois.gov', a password field with masked characters, a 'Sign in' button, and three links: 'Reset your password', 'Recover your Username', and 'Create a new account'.

ILLINOIS.gov
Authentication Portal

Sign in with one of these accounts

-  Public Account
-  Partner Account
-  Employee Account

ILLINOIS.gov
Authentication Portal

Sign in with your Public account

- [Reset your password](#)
- [Recover your Username](#)
- [Create a new account](#)

Reference Material

Reference Material Outline

- AmpliFund Navigation
- Access and Users via Single Sign On

AmpliFund Navigation

AmpliFund Navigation

- Left Navigation Menu
- User Information
- Options Toolbar

The Left Navigation menu is on every page in AmpliFund

User Information allows Users to access the following:

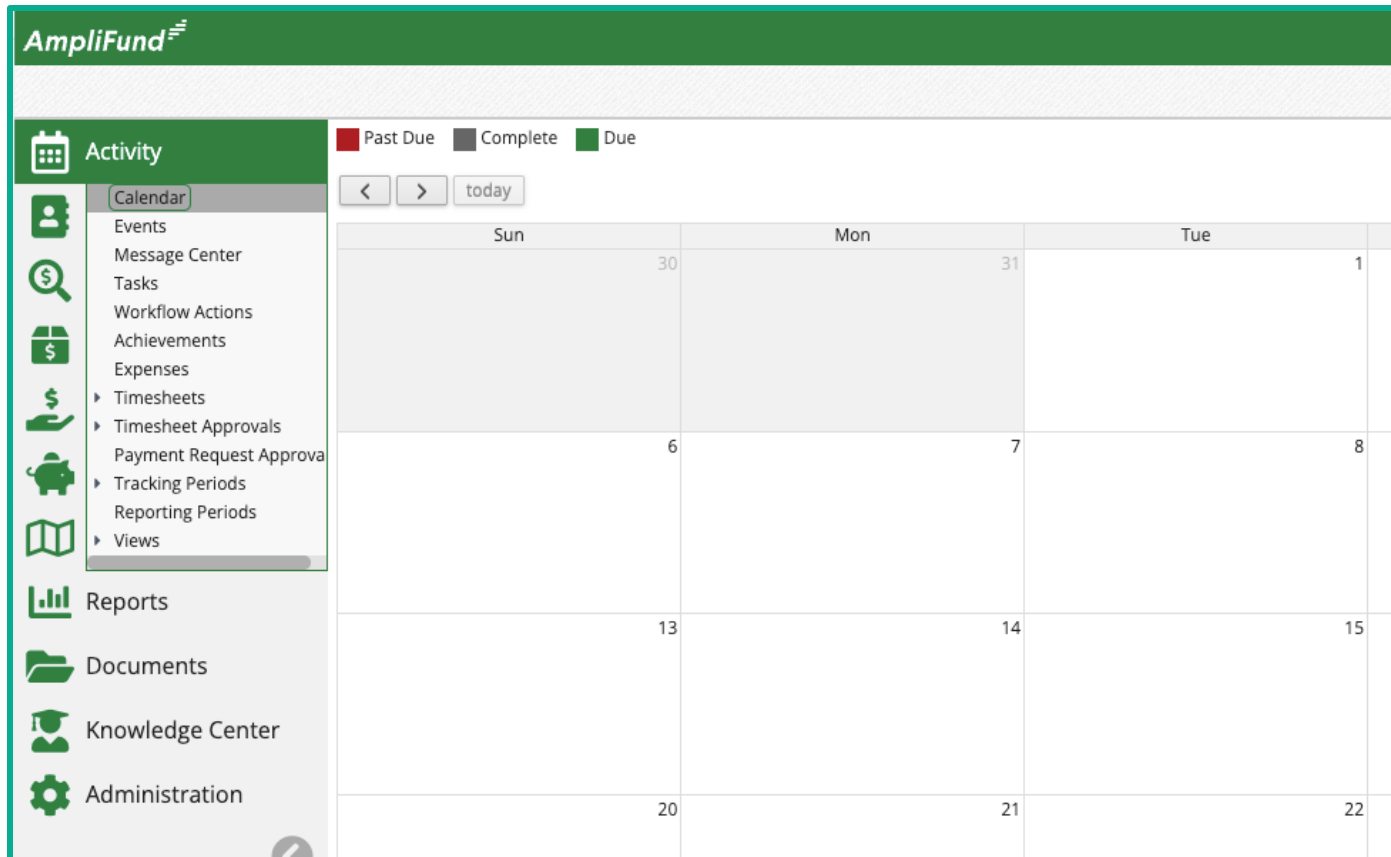
- Account Information
- Change Password
- Message Center
- Help and Support
- Terms and Conditions
- Logout

The Options Toolbar allows for enhanced functionality and changes based on what page you are on in AmpliFund

The screenshot displays the AmpliFund interface. On the left is a navigation menu with items: Activity, Contacts, Research, Grant Management, Award Management, Fund Management, Project Management, Reports, Documents, Knowledge Center, and Administration. The main area shows a calendar for August 2023. A red line highlights the 'Fund Management' menu item, with red arrows pointing to the 'User Information' and 'Options Toolbar' callout boxes. The top header shows the AmpliFund logo and the user name 'Thomas Colgrove'. The calendar grid shows dates from Sun 30 to Sat 26, with a yellow highlight on Friday, August 18th.

Activity Center

Use the Activity Center as a shortcut to user specific functionality in AmpliFund



The screenshot displays the AmpliFund Activity Center interface. On the left is a navigation sidebar with icons and labels for various sections: Activity (Calendar), Reports, Documents, Knowledge Center, and Administration. The main area shows a calendar grid with a legend for 'Past Due' (red), 'Complete' (grey), and 'Due' (green). The calendar is currently set to 'today' and shows dates from Sunday 30 to Tuesday 1.

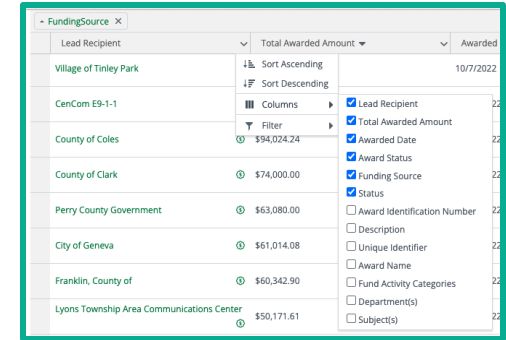
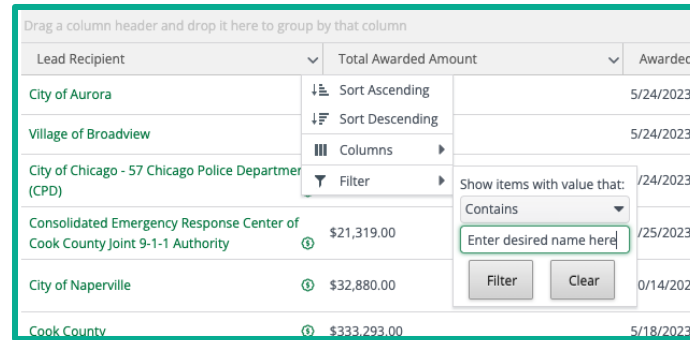
Sun	Mon	Tue
30	31	1
6	7	8
13	14	15
20	21	22

Filtering Data and Custom Views

Some pages in AmpliFund have numerous data records, and learning to Filter Data and create Custom views will significantly improve overall user efficiency

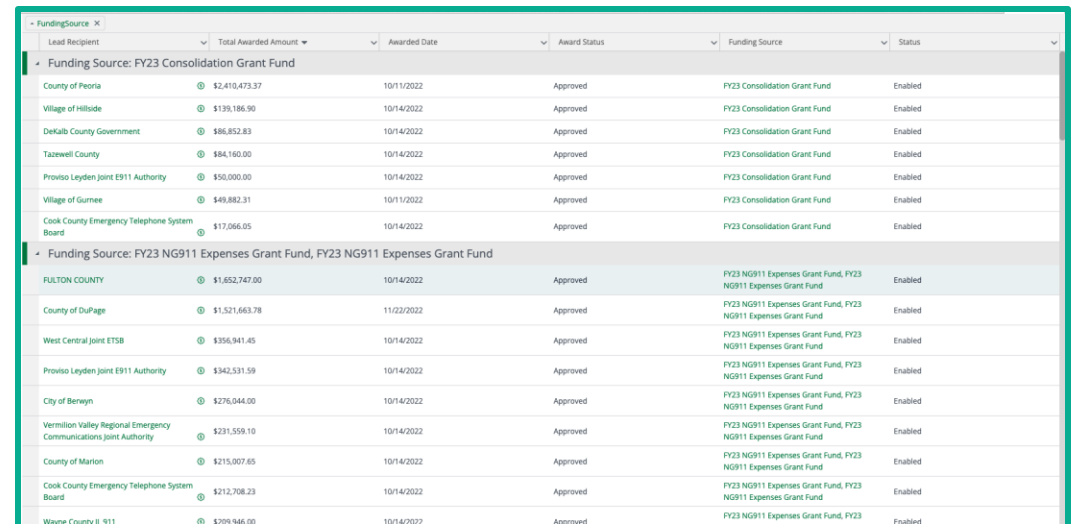
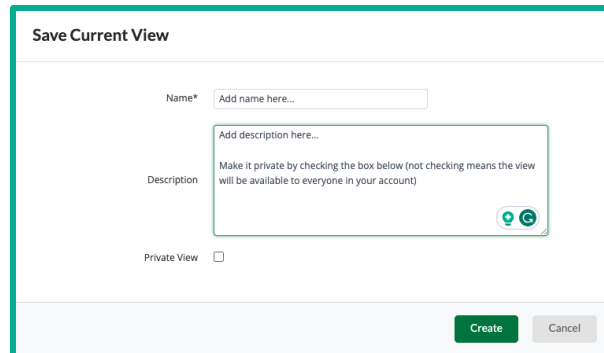
Filter Data

- Sort
- Manually Filter
- +/- Columns
- Sort by Columns



Custom Views

- Private
- Public



Access and Users via Single Sign On

Grantee Single Sign On

Prerequisites

- User must have a Public Illinois.gov domain account
- User's Public Illinois.gov account must be linked to a Grantee Organization account by UEI number in the GATA Grantee Portal
- User's access in the GATA Grantee Portal must allow for access to the AmpliFund Grant Management System

Single Sign On for Grantee Users

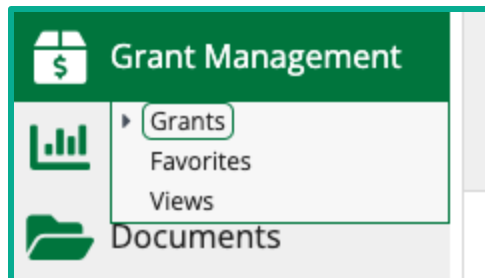
- Access AmpliFund via <https://il.amplifund.com> or Application Link.
- User is directed to the IL.gov Authentication Portal
 - Select Public Account
 - Enter in Public Account credentials (Username and Password)

All new users for Grantee accounts must be configured within the GATA Grantee Portal > Grantee Organization with access to AmpliFund enabled to have access to AmpliFund.

Grant Details

Grant Details

- Access Grants by clicking on Grants Management > Grants
- A list of all Grants in your account appears, select the desired Grant
- Now you are on the Grant Details Page
- Review the details as needed and click the pencil edit icon on the top right of the screen to add the following information:
 - Recipient Award Name – Optional
 - Recipient Grant Manager – Required (pulls from users in your account)
 - Recipient Description – Optional
 - Click Save on the bottom right of the screen

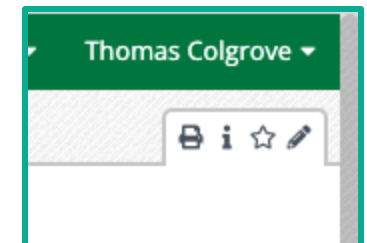


A screenshot of a table listing grants. The table has two columns: 'Name' and 'Grantor'. The first row is 'Early School Leaver Transition Program - Award' with 'Illinois Community College Board' as the grantor. The second row is 'FY24 ESLTP' with 'Illinois Community College Board' as the grantor.

Name	Grantor
Early School Leaver Transition Program - Award	Illinois Community College Board
FY24 ESLTP	Illinois Community College Board

A screenshot of the 'FY24 ESLTP - Award Details' page. The page has a header with 'Details', 'Analytics', 'Pre-Award', 'Post-Award', and 'Tools' tabs. Below the header is the title 'FY24 ESLTP - Award Details' and a sub-section 'Award Information and Status'. The details are as follows:

Name	FY24 ESLTP - Malcolm X
Recipient Name	Malcolm X College
Recipient Vendor ID	9001413249
Recipient Award Name	FY24 ESLTP



Performance Plan and Achievements

Access Achievements

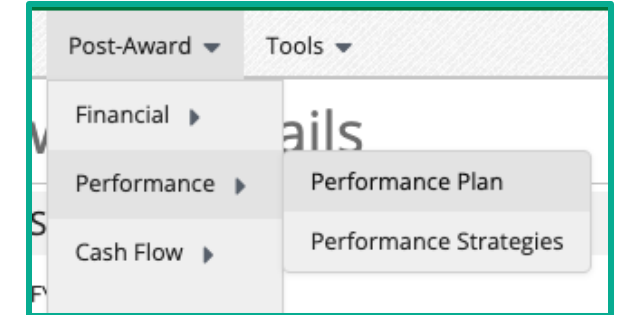
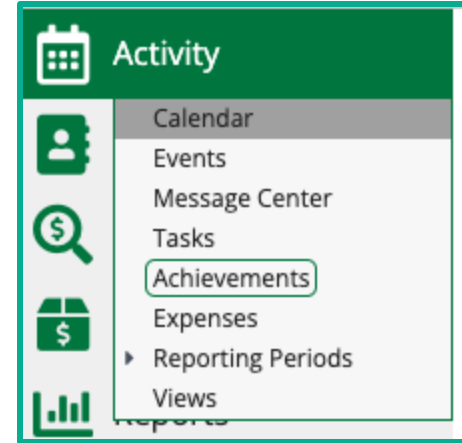
There are two ways to access Achievements:

Grant Details page

- Post-Award > Performance > Performance Plan
- Review the Performance Plan here

Activity Center

- Activity > Achievements



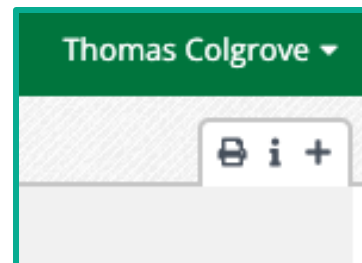
Name	Goal Type
Program Design	Narrative
Student Recruitment, Enrollment and Retention	Narrative
CADI - Career Awareness and Development Instruction	Narrative
Transition Services	Narrative

Add Achievements – Grant Details Page

Grant Details Page

- Post-Award > Performance > Performance Plan (shows Goals from only the Grant)
- Click on the trophy icon
- From the Achievements page review all Achievements for that goal
- Click on the + icon on the top right of the screen to add a new Achievement for that goal
- Enter all the required information (ensure the date entered is within the date range of the desired Reporting Period)
- Click Create

Achievement Date	Completed
3/31/2023	Yes
5/12/2023	No
9/30/2022	Yes
12/31/2022	Yes



Create Achievement

Grant: Early School Leaver Transition Program - Award

Goal Type: Narrative

Goal: Program Design

Description: Address each of the following points: progress on the implementation of your program design; how are you meeting target populations; challenges and solutions to serving this population; if and how you are serving HSE students; and how are you including diversity, equity, and inclusion.

Responsible Individual: Thomas Colgrove

Achievement Date: 9/15/2023
The chosen date is outside of the goal's planned Start and End Dates (7/01/2022 - 6/30/2023). To proceed, click Create. To edit, change the selected date.

Question: Address each of the following points: progress on the implementation of your program design; how are you meeting target populations; challenges and solutions to serving this population; if and how you are serving HSE students; and how are you including diversity, equity, and inclusion.

Answer*









Complete

Notes

Add Achievements – Activity Center

Activity Center

- Activity > Achievements (Shows Goals from all Grants)
- Click on the + icon next to the Goal you want to enter an Achievement against
- Follow the same process as the previous slide

Activity Name		Grant Name	Goal Type
Program Design	 +	Early School Leaver Transition Program - Award	Narrative
Student Recruitment, Enrollment and Retention	 +	Early School Leaver Transition Program - Award	Narrative
CADI - Career Awareness and Development Instruction	 +	Early School Leaver Transition Program - Award	Narrative
Transition Services	 +	Early School Leaver Transition Program - Award	Narrative
Support Services	 +	Early School Leaver Transition Program - Award	Narrative
Work-Based Learning	 +	Early School Leaver Transition Program - Award	Narrative
Program Evaluation	 +	Early School Leaver Transition Program - Award	Narrative
Student Success Story	 +	Early School Leaver Transition Program - Award	Milestone

Reporting Periods

Access Achievements

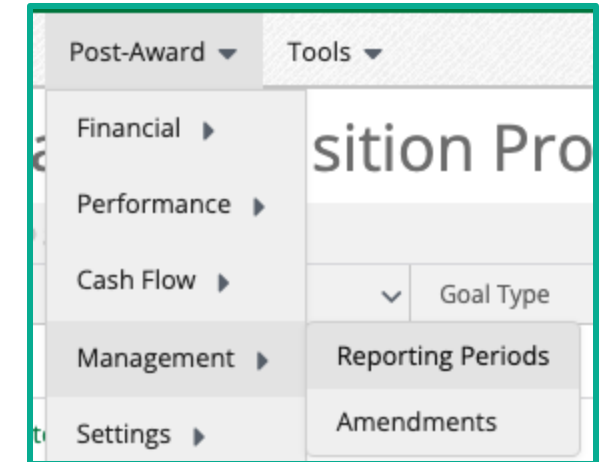
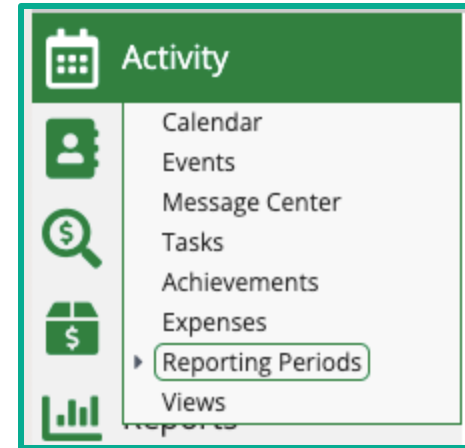
There are two ways to access Reporting Periods:

Grant Details page

- Post-Award > Management > Reporting Periods

Activity Center

- Activity > Reporting Periods



Reporting Period Start Date	Reporting Period End Date	Reporting Period
7/1/2022	9/30/2022	Budget
10/1/2022	12/31/2022	Budget
1/1/2023	3/31/2023	Budget
4/1/2023	6/30/2023	Budget
7/1/2022	9/30/2022	Performance
10/1/2022	12/31/2022	Performance
1/1/2023	3/31/2023	Performance
4/1/2023	6/30/2023	Performance

Submit Reporting Period – Grant Details Page

Grant Details Page

- Post-Award > Management > Reporting Periods
- From the Reporting Period page review all the Performance Periods submitted for this Grant
- Click on the + icon on the top right of the screen to create a new Reporting Period
- Select Expenses and/or Achievements
- Select the Reporting Period (there may be a time period option but use the Reporting Period)
- Click Save
- Configure the Reporting Period

Reporting Periods

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...

- 07/01/2023-07/31/2023
- 08/01/2023-08/31/2023
- 09/01/2023-09/30/2023
- 10/01/2023-10/31/2023

Cancel
Save

Start: 7/1/2023 End: 7/31/2023

Status: Open

Expenses

Overall Expense Details

Total Awarded Amount \$100,000.00

Total Expense Amount for Period ● \$12,000.00

Number of Unreviewed Expenses 0

Comments

Attach Documentation
Choose a file

Submit Reporting Period – Activity Center

Activity Center

- Activity > Reporting Periods (shows Reporting Periods from all Grants)
- Click on the + icon on the top right of the screen to create a new Reporting Period
- Select the Grant
- Select Expenses or Achievements
- Select the Reporting Period (there may be a time period option but use the Reporting Period)
- Click Save
- Configure the Reporting Period

Reporting Periods

Which grant would you like this closeout to apply to?

Select a grant... ▾

What types of reporting periods would you like to include?

Expenses

Achievements

Program Income

What period of time would you like to close?

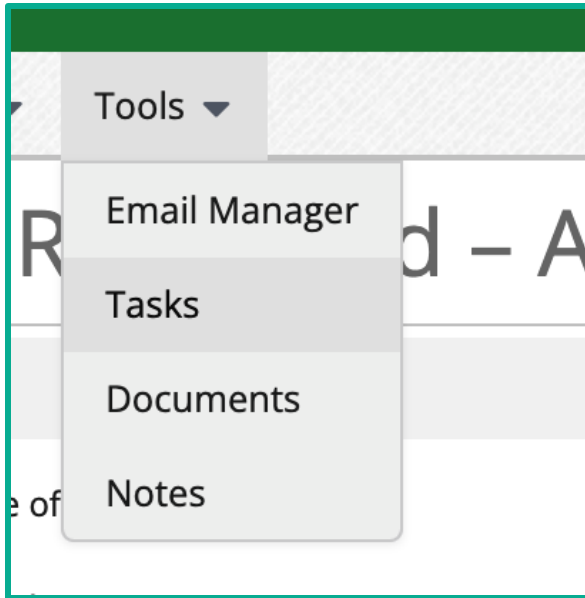
Select a time period... ▾

Cancel Save




AmpliFund Tools

























Access Tasks by completing the following steps:

- From the Grants Details Page click on Tools > Tasks
- Here you can mark your Reporting Tasks as complete by clicking on the check mark icon



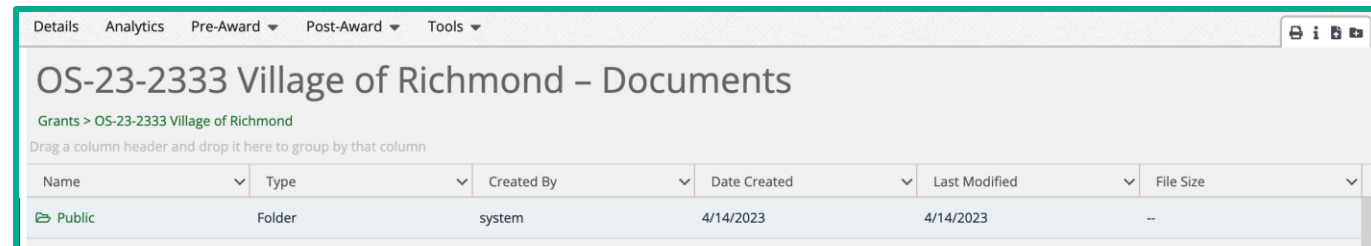
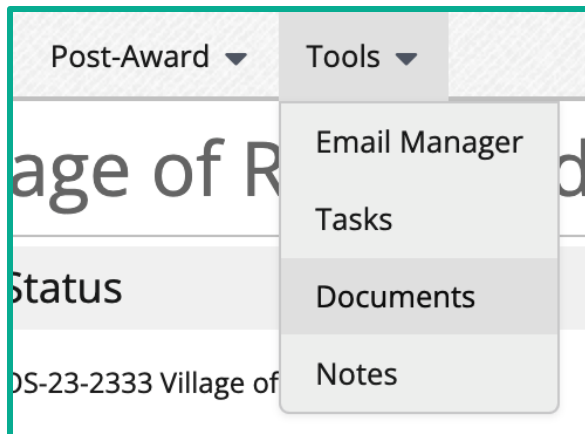
OS-23-2333 Village of Richmond – Tasks

Actions
  

<input type="checkbox"/> Select All	Name	Responsible Individual	Due Date	Task Status
<input type="checkbox"/>	Performance Tracking Period Due - OS-23-2333 Village of Richmond   	Admin User	8/15/2023	Not Started
<input type="checkbox"/>	Performance Tracking Period Due - OS-23-2333 Village of Richmond   	Admin User	11/15/2023	Not Started
<input type="checkbox"/>	Performance Tracking Period Due - OS-23-2333 Village of Richmond   	Admin User	2/15/2024	Not Started
<input type="checkbox"/>	Performance Tracking Period Due - OS-23-2333 Village of Richmond   	Admin User	5/15/2024	Not Started
<input type="checkbox"/>	Performance Tracking Period Due - OS-23-2333 Village of Richmond   	Admin User	8/15/2024	Not Started
<input type="checkbox"/>	Performance Tracking Period Due - OS-23-2333 Village of Richmond   	Admin User	11/15/2024	Not Started
<input type="checkbox"/>	Performance Tracking Period Due - OS-23-2333 Village of Richmond   	Admin User	2/15/2025	Not Started
<input type="checkbox"/>	Performance Tracking Period Due - OS-23-2333 Village of Richmond   	Admin User	5/15/2025	Not Started

AmpliFund allows Grantees to upload private or shared documents by completing the following steps:

- From the Grants Details Page click on Tools > Documents
- Upload files by clicking on the upload icon on the top right of the screen
- Create your own file structure by clicking on the new folder icon on the top right of the screen
- Shared documents must be uploaded in the Public folder



In-Product Demo

Customer Support

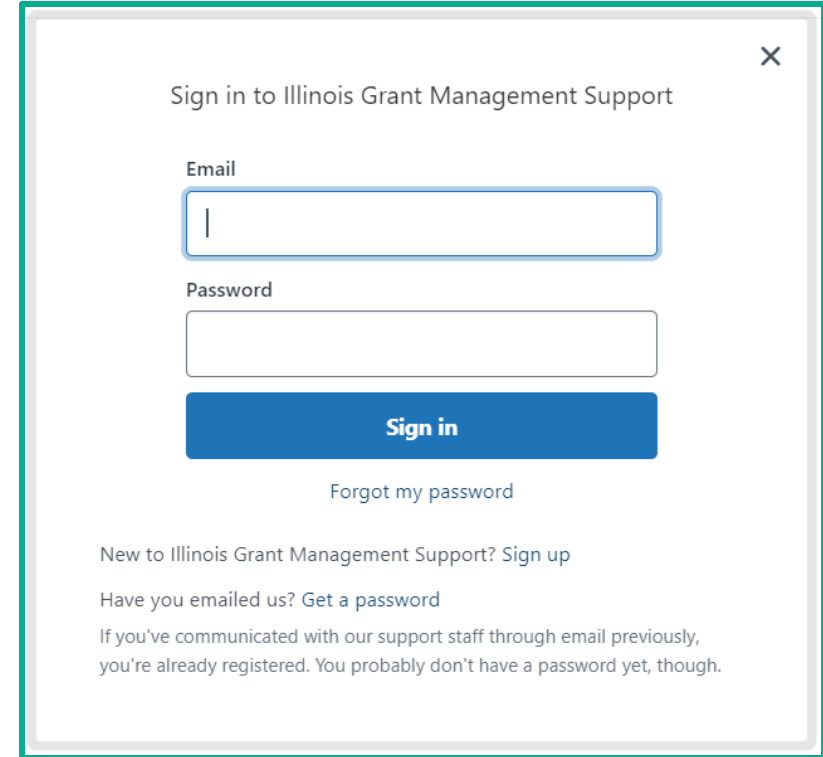
Supported Browsers

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

For the best experience we encourage the use of Google Chrome

Create AmpliFund Support Account

1. Go to <https://il-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:

support@il-amplifund.zendesk.com

Visit the support portal:

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

AmpliFund Grantee/Recipient Series

- <https://il-amplifund.zendesk.com/hc/en-us/sections/4402911993619-AmpliFund-Grantee-Recipient-Series>

