

# Budget Management Updates

Training 2: Grant Management Updates

# Agenda

- Introductions
- Budget Management Updates
- Training Schedule & Office Hours
- Available Materials & Support
- Grant Budget Settings Updates
- Grant Budget Updates
- Questions

# Introductions



- Jillian Neimeister, Product Trainer
- Christy Pellegrino, Product Trainer
- Kevin French, VP of Customer Success

# Budget Management Updates

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## **Administration Updates**

- Budget Categories List
- Benefit Types List

## **Contact Management Updates**

- Staff Compensation History
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## **Grant Management Updates**

- Left Navigation Update
- Budget Settings
- Budget Creation and Management

# Training Schedule & Office Hours

## Training 1: Administration & Contact Management Updates

- July 21, 11:00 am – 12:00 pm (EDT)
- July 26, 2:00 pm – 3:00 pm (EDT)
- July 28, 11:00 am – 12:00 pm (EDT)

***Training sessions will be recorded and accessible on demand on the support site.***

## Training 2: Grant Management Updates

- July 21, 2:00 pm – 3:00 pm (EDT)
- July 26, 11:00 am – 12:00 pm (EDT)
- July 28, 2:00 pm – 3:00 pm (EDT)

## Office Hours

- July 26 – 29, 9:00 am – 5:00 pm (EDT)

# Available Materials & Support

## Updated Documentation

- Administration Guide
- Contact Management Guide
- Grant Management Guide
- Changes Matrix

## Customer Support

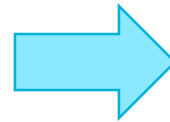
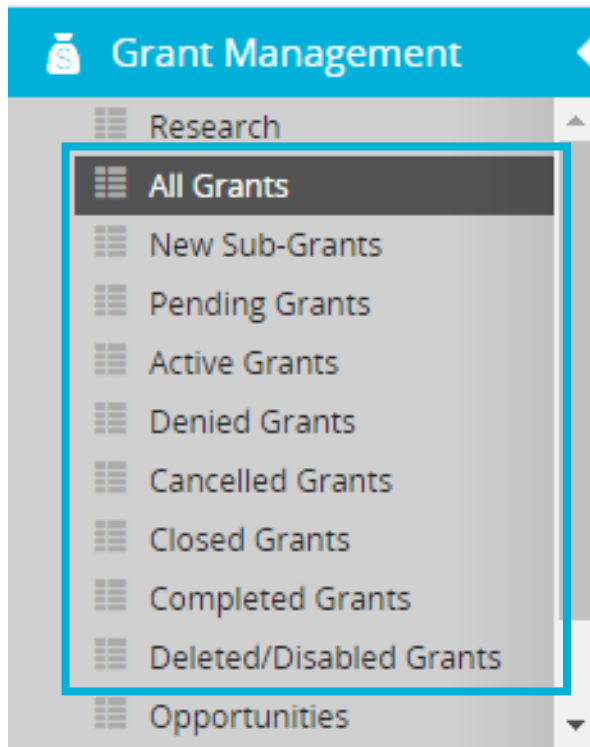
- Office Hours: July 26 – 29, 9:00 am – 5:00 pm (EDT)
- Support Hours: Monday – Friday, 8:00 am – 8:00 pm (EDT)
- Support Site and Tickets

# Budget Settings & Budget Updates

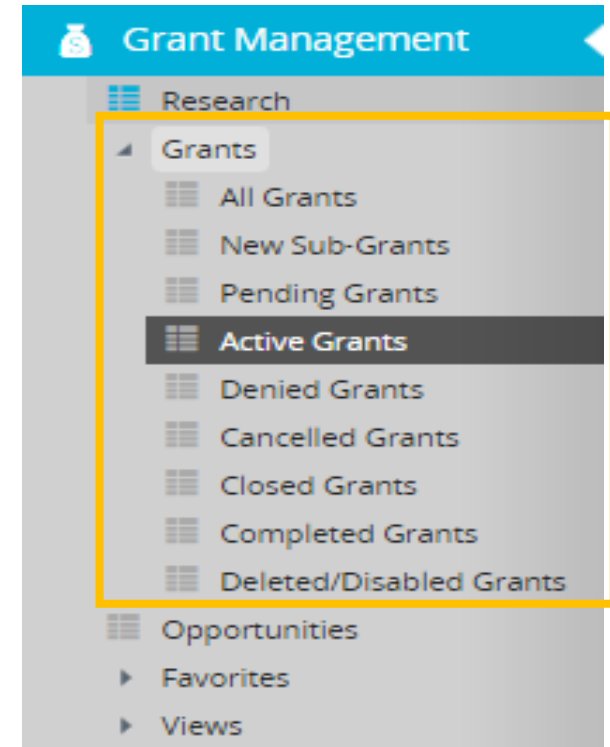
# Left Navigation

## Grant Management

**Current View**



**Updated View**



# Grant Budget Settings



## Post-Award → Budget Settings

Matching	
Matching Required	<input type="text" value="Yes"/>
Post-Award Cash Match Amount	\$750,000.00
Default Cash Match	<input type="text" value="Do Not Default"/>
Post-Award In-Kind Match Amount	\$0.00
Default In Kind Match Personnel	<input type="text" value="Do Not Default"/>
Default In Kind Match Non Personnel	<input type="text" value="Do Not Default"/>

Indirect Cost Rate	
Track Indirect Cost Rate	<input type="text" value="Yes"/>
Include Indirect On Match	<input type="text" value="No"/>
Federal Rate Type	<input type="text" value="Final"/>
Federal Negotiated Rate	<input type="text" value="3.00 %"/>

# Grant Budget Settings

Updated View

## Post-Award → Budget Settings

### Matching

Match

Use Match Percentage As  ?

Post-Award Cash Match Amount \$750,000.00

Default Cash Match

Post-Award In-Kind Match Amount \$0.00

Default In Kind Match Personnel

Default In Kind Match Non Personnel

### Indirect Cost Rate

Track Indirect Cost Rate

Cap Indirect at \_\_\_ amount of Total Awarded Amount

Grant Start Date 11/1/2012

Grant End Date 10/31/2017

Rate Type	Indirect Rate	Start Date	End Date
<input type="text" value="Final"/>	<input type="text" value="3.00000000 %"/>	<input type="text" value="03/04/2015"/>	<input type="text" value="10/31/2017"/> +

# Grant Budget Settings



## Post-Award → Budget Settings *(continued)*

### Categories

Budget Categories

Budget Categories 

- Compensation
- Equipment
- Insurance
- Programmatic Supplies & Assistance
- Sub-Recipient License
- Supplies
- Technology
- Travel

### Benefits

Add Benefits By ?

Supported Benefit Type ?

Benefit Type 

- FICA Rate Benefit
- Fringe Benefit
- Medical Benefit
- Other Benefit
- Retirement Benefit

# Grant Budget

Current View

Post-Award → Budget

The screenshot shows the AmpliFund software interface. The top navigation bar includes 'AmpliFund', 'StreamLink Software', and 'StreamLink Software'. Below the navigation bar, there are tabs for 'Back', 'Details', 'Pre-Award', 'Post-Award', 'Tools', 'Grant Workflow', and 'Budget Workflow'. The main content area is titled 'Career Training for Community College Students - Budget'. Below the title, there is a table with columns: Name, Item Type, Start Date, End Date, Responsible Individual, and Total. The table contains 8 rows of budget items. At the bottom of the table, there is a pagination control showing '1' of 8 items per page and '1 - 8 of 8 items'.

Name	Item Type	Start Date	End Date	Responsible Individual	Total
First Aid Kits	Non-Personnel	6/1/2013	6/1/2016	Dennis Hendler	\$200.00
Install wireless routers in computer lab	Non-Personnel	6/1/2013	6/1/2013		\$1,500.00
Liability insurance	Non-Personnel	6/1/2013	4/29/2016	Barbara Wangeletti	\$7,500.00
Nicki Andrews	Personnel	6/1/2013	4/29/2016	StreamLink Software	\$107.65
Nicki Andrews	Personnel	6/1/2013	4/29/2016	Nicki Andrews	\$1,803.80
Pamphlet Materials (edited)	Non-Personnel	6/1/2013	4/29/2016		\$139.00
StreamLink Software	Personnel	6/1/2013	4/29/2016	Dennis Hendler	\$138,450.00
StreamLink Software	Personnel	6/1/2013	4/29/2016	Dennis Hendler	\$2,650.00

# Grant Budget

Updated View

## Post-Award → Budget

The screenshot displays the AmpliFund software interface. The top navigation bar includes 'StreamLink Software' and 'Demo User'. The main menu on the left lists various sections like Activity, Contacts, Grant Management, Research, Grants, Opportunities, Favorites, Views, Project Management, Fund Management, Documents, Reports, Knowledge Center, and Administration. The 'Grant Management' section is active, showing a list of grant statuses including 'Active Grants'. The main content area is titled 'Career Training for Community College Students - Budget' and includes 'Budget View Settings' with a 'View By' dropdown set to 'Category'. Below this, there are 'Options' for filtering by Project, Recipient, Grant Year, and Line Items. The 'Budget' section features a table with columns for 'Expense Budget +', 'Grant Funded', 'Match', and 'Total Cost'. The table lists budget items for three recipients: Carrie Fortune, Demo User, and Jane Smith, with sub-items for Compensation and various benefits.

Expense Budget +	Grant Funded	Match	Total Cost
<b>Compensation</b>			
Carrie Fortune	\$38,040.00	\$0.00	\$38,040.00
Fringe Benefit	\$0.00	\$0.00	\$0.00
FICA Rate Benefit	\$0.00	\$0.00	\$0.00
Medical Benefit	\$0.00	\$0.00	\$0.00
Retirement Benefit	\$0.00	\$0.00	\$0.00
Other Benefit	\$0.00	\$0.00	\$0.00
Demo User	\$125,000.00	\$0.00	\$125,000.00
Fringe Benefit	\$37,500.00	\$0.00	\$37,500.00
FICA Rate Benefit	\$0.00	\$0.00	\$0.00
Medical Benefit	\$0.00	\$0.00	\$0.00
Retirement Benefit	\$0.00	\$0.00	\$0.00
Other Benefit	\$0.00	\$0.00	\$0.00
Jane Smith	\$6,095.33	\$0.00	\$6,095.33

# Grant Budget Line Items

Current View

## Budget Line Item Settings

**Line Item Information**

Item Type: Non-Personnel Line Item

Category: Travel

Name\*: On-site training

Description:

GL Account: Select GL Account...

Direct Cost\*  Value  Exclude From Match  Exclude From Indirect

Cash Match Amount  Amount  Match Amount Type  ?

In Kind Match Amount  Amount  Match Amount Type  ?

Responsible Individual: Jane Smith

Start Date\*: 11/1/2012

End Date\*: 10/31/2017

# Grant Budget Line Items



## Budget Line Item Settings *(continued)*

### Line Item Direct Cost Distribution

Grant Funded \$2,000.00

In-Kind Total \$0.00

Total \$2,000.00

### Delegations

Name	Add'l Staff	Start Date	End Date	Project Line Item	Amount	
Jane Smith	0	11/1/2012	10/31/2017		<input type="text" value="\$2,000.00"/>	

**Total Amount** \$2,000.00  
**Delegated Amount** \$2,000.00  
**Undelegated Amount** \$0.00

# Grant Budget Categories

Updated View

## Budget Category Settings

### Add to Budget

#### Category Details

Category  ▼  
[Add New Category](#)

Budgeted Amount

Indirect Cost  ▼ ?

Cash Match  ▼ ?

In-Kind Match  ▼ ?

#### Change Restrictions

Expense Cap

Do not allow expenses to exceed

#### Spending Alerts

Per Tracking Period ?

Life of Grant ?

# Grant Budget Line Items



## Budget Line Item Settings

- **General tab**
- Financials tab
- Configuration tab
- Attachments

A screenshot of a web-based form for "Budget Line Item Settings". The form has four tabs: "General" (selected), "Financials", "Configuration", and "Attachments". The "General" tab contains the following fields:

- Item Type: Non Personnel (dropdown)
- Category: (empty dropdown)
- Name\*: Supplies for Career Ever (text input)
- Direct Cost\*: \$15,612.95 (text input)
- Exclude From Match:  (checkbox)
- Exclude From Indirect:  (checkbox)
- Responsible Type: Individual (dropdown)
- Responsible Individual\*: Barbara Wangeletti (text input with search icon)
- Description: (empty text area)

At the bottom right, there are three buttons: "Cancel" (grey), "Lock" (red), and "Save" (teal).

# Grant Budget Line Items



## Budget Line Item Settings

- General tab
- **Financials tab**
- Configuration tab
- Attachments

The screenshot shows the 'Financials' tab of the 'Budget Line Item Settings' interface. It includes several input fields and buttons for configuring financial parameters.

**General** | **Financials** | Configuration | Attachments

Direct Cost:

Cash Match Amount:  Dollar | **Percentage**

In Kind Amount:  Dollar | **Percentage**

GL Account:

312-42564-15 Supplies

Allocate: Monthly | **Yearly**

Grant Year	Start Year	Amount
1	2012	<input type="text" value="\$3,122.59"/>
2	2013	<input type="text" value="\$3,122.59"/>
3	2014	<input type="text" value="\$3,122.59"/>
4	2015	<input type="text" value="\$3,122.59"/>

# Grant Budget Line Items

Updated View

## Budget Line Item Settings

- General tab
- Financials tab
- **Configuration tab**
- Attachments

The screenshot shows the 'Configuration' tab of the 'Budget Line Item Settings' interface. At the top, there are four tabs: 'General', 'Financials', 'Configuration' (which is selected and highlighted in blue), and 'Attachments'. Below the tabs, there is an 'Expense Cap' field with a text input containing '\$0.00'. To the right of the input is a small '\$0.00' label. Below the input is a checked checkbox with the text 'Do not allow expenses to exceed'. Underneath this is the section 'Spending Alerts', which contains two options: 'Per Tracking Period ?' with a checked checkbox, and 'Life of Grant ?' with an unchecked checkbox. At the bottom right of the form, there are three buttons: 'Cancel' (grey), 'Lock' (red), and 'Save' (teal).

# Grant Budget Line Items



## Budget Line Item Settings

- General tab
- Financials tab
- Configuration tab
- **Attachments**

A screenshot of the "Attachments" tab in the "Budget Line Item Settings" interface. The interface features a top navigation bar with four tabs: "General", "Financials", "Configuration", and "Attachments". The "Attachments" tab is currently selected and highlighted in blue. Below the navigation bar, the section is titled "Attach Documentation" and contains a "Choose a file" button with a plus icon and a trash icon. At the bottom right of the interface, there are three buttons: "Cancel", "Lock", and "Save".

# Questions

