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# User Guide

**July 2018**

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# Amp Impact Overview

**What is Amp Impact?**
Amp Impact is an indicator management and performance tracking application built on the Salesforce Platform. It helps grantmakers and grant recipients track targets and results for performance indicators across geographies, projects, and reporting periods. When combined with Salesforce Communities, Amp Impact provides a powerful platform for facilitating two-way data sharing between funders and their grantees or investees.

**Amp Impact's Key Features:**
Choose What to Report

- Create and manage a catalog of standard Indicators for reporting across the portfolio
- Create custom Indicators by project / grant / grantee
- Report on quantitative (number, percent, currency), qualitative, and milestone indicators

Choose How to Report

- Categorize / tag Indicators and Projects
- Disaggregate Indicators by anything (age group, sex, type of beneficiary, etc.)
- Set performance targets by indicator across geographies
- Easily analyze results against targets over time
- Upload supporting documents in a grant/project report
- Set up simple or complex approval processes for grant/project reports
- Select reporting frequencies per indicator

Leverage the flexibility of the Salesforce Platform

- Connect performance data seamlessly to your CRM data
- Use Salesforce Communities to provide grantees a secure, user-friendly reporting portal
- Control the branding and look-and-feel with drag-and-drop page design
- Analyze data using Salesforce's powerful drag-and-drop report and dashboard builders
- Build in rule-based workflow and processes to send email alerts or assign tasks

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## Amp Impact Terminology

| Amp Impact Label | Possible Label(s) | Description |
|---|---|---|
| Project | Grant<br>Investee<br>Program<br>Investment | Unit/ reporting level for managing indicators, internal and external reporting and program management |
| Indicator | Metric<br>Key Performance Indicator (KPI) | Catalog of indicators tracked. These may include global and/or customized, project-specific indicators |
| Geographic Area | | Geographic level at which targets are set/results are reported within a project and for each project indicator.<br>For example, country or district |
| Reporting Period | | Time period for when targets are set/ results are reported within a project and for each project indicator.<br>For example, quarterly or annual |
| Disaggregation Group and Values | Category | Capture detailed data for an indicator by different groupings with associated values<br>For example:<br>Disaggregation group - Age<br>Disaggregation values - under 5, 6-10, 11+ |
| Thematic Area | Focus Area<br>Impact Pillar<br>Theme<br>Sector | Tag/ categorize Projects and/or Indicators by themes, or areas of work focus<br><br>Examples: Health, Education, Energy |
| Objective | Goal<br>Outcome | Tag/ categorize indicators within an impact measurement or logic model framework |

| | | |
|---|---|---|
| Logframe Item | Objective | In a Logical Framework, the list of Objectives that are tracked. The Logframe Item uses the Objective object. These can be identified as various levels - impact, outcome, output, activity, or input |
| Actualized Logframe | | A Logical Framework which displays data for associated Indicators to track their baseline data, targets set and results achieved to date |
| Disbursement | Payment | Track the amount and status of financial transactions |
| Budget | | Track the amount of money available to spend and compare it to the money actually spent for a project. This is a line-item based table with details for accounting the resources available and spent for the project |
| The IATI Standard | | International Aid Transparency Initiative |

## Navigate Amp Impact – from indicator definition to data entry and visualization

To start navigating Amp Impact features, first use the instructions in the *Installation* guide to:

1. Create a Project record

> **NOTE**: When creating a new Project, the title of this Project **cannot** contain a special character such as " *: ; ' "* .

2. Create Geographic Area record(s) and associate them with the Project
3. Create Reporting Period record(s) and associate them with the Project
4. If applicable, create:
    a. Disaggregation Groups
    b. Thematic Areas and Project Thematic Areas
    c. Objectives and Project Objectives

An organization can thereafter customize and select how to use the following features:

<u>Manage Framework</u>
Create and structure a project's impact / logic model framework.

<u>Manage Indicators</u>
Select from a list of catalog indicators to report on. Alternatively, create custom indicators to report on.

<u>Set Targets</u>
Enter and track targets for individual project indicators, filtered by reporting period and geographic area.

<u>Add Results</u>
Enter and track results for individual project indicators, filtered by reporting period and geographic area.

Performance Graphs

View bar charts per individual project indicator comparing target vs results values across all reporting periods.

Financials

Create and schedule disbursements paid out to grantees/programs.

Manage project budget(s) based on planned versus actual expenditure line items.

Project Roles

Assign and manage a contact's involvement and specific role within a Project

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# Manage Framework

Overview: The Manage Framework Visualforce page allows users to build and manage the logical framework for a project by setting Objectives in hierarchical order and displaying their related indicators for a high-level overview of the project's progress.

To set up and use this feature: refer to the 'Customize Field Sets' section of the *Installation* Guide[1]

## Logframes Explained

Definition: A logframe is a means to organize the planning, implementation, management, monitoring, and evaluation of projects. It serves as a structure that outlines and links together key points/goals of a project in a logical way (UNODC).

Throughout the duration of a project, logframes can be referred to in order to ensure that the goals, objectives of a project are being met by tracking indicators associated with those objectives.

**How do you write a Logframe in Amp Impact?**

Different institutions have different methods and terminology for outlining logframes. In Amp Impact, the *Objective* object is used for the Logframe Item column. Objectives and sub-objectives can be created by the user and a *Level* can be associated with each Objective, to create a hierarchy and structure for the Logical Framework.

 **NOTE**: The *Level* field of a logframe in Amp Impact does not prescribe an order. The purpose of this framework is to serve as a logical structure to the project. For that reason, a project may not have one outcome, output, activity, and input per impact objective. You can customize the terminology and usage of Levels, to meet organizational needs.

[1] Field Sets can only be customized in Salesforce Classic.

**Impact:** Outlining the impact of a project is the broadest goal in a logframe.
Example: "A decrease in the number of new cases of malaria."

↳ **Outcome:** Outcomes in a logframe are the second broadest levels. This objective often answers questions such as: What will be achieved? Who will benefit? By when will this be achieved?
Example: "New and improved methods of preventing mosquitoes from entering homes implemented by homeowners within 6 months."

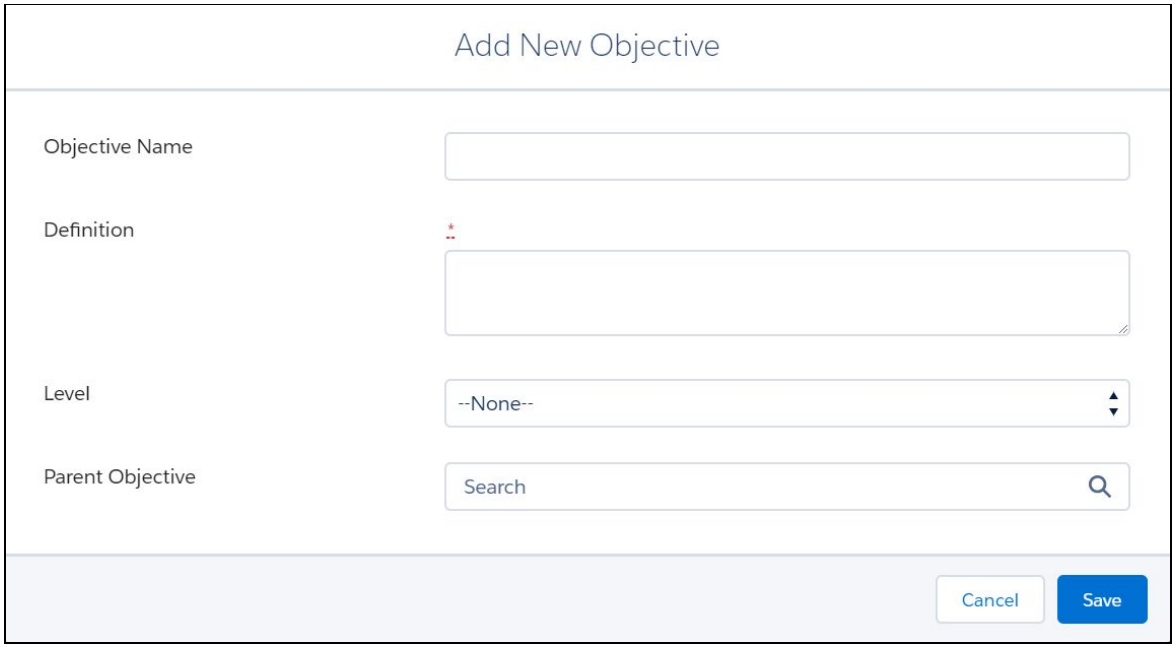
↳ **Output:** An output is a level in the framework that defines specific results or deliverables that the project will produce.
Example: "2000 families are reached through the efforts of this project and at least 60% of those reached implement malaria-preventing practices, such as putting up mosquito nets at night."

↳ **Activity:** An activity defines a task(s), event(s), or occurrence(s) to be completed during the project.
Example: "100 training sessions must be conducted, covering the perils of malaria, the importance of preventing the disease, and a demonstration on how to use a mosquito net."

↳ **Input:** The input level of a logframe defines an resources used during the project. This can include, but is not limited to, human resources, money, materials, equipment, time, etc.
Example: "Hire 10 health professionals to educate and speak on malaria prevention during each session conducted."

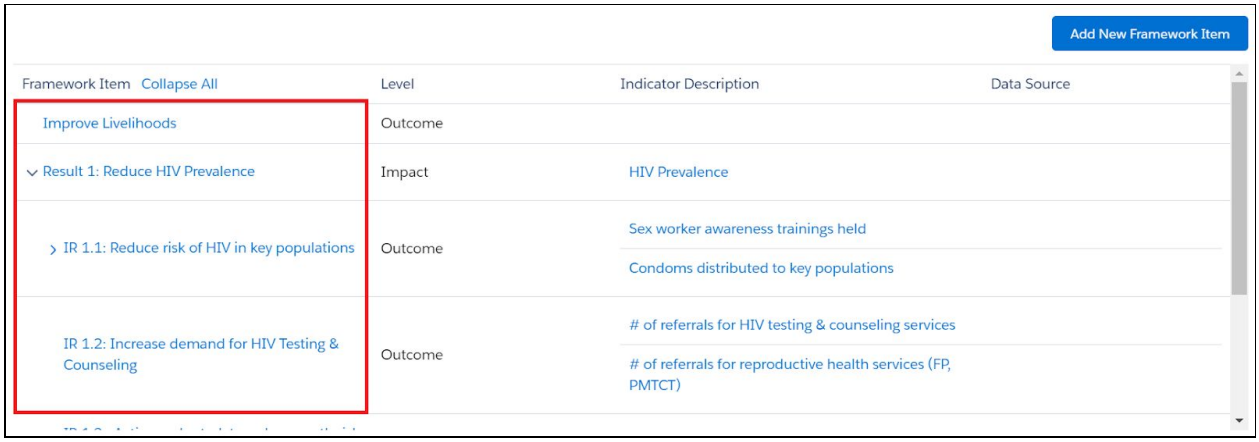
## Create and View Objectives for a Project

a. From the Manage Framework page, a user can create new objectives and add them to a project by clicking the "Add New Framework Item" button on the top right of the Framework page. A pop-up will appear with Objective fields for the user to fill out. When a user clicks "Save" on the pop-up, an Objective record and a Project Objective junction record are created.




b. Objectives can look up to other Objectives, which creates a hierarchy represented with nesting, i.e. a parent Objective will be left-justified, and its immediate child Objectives will be indented once from the left.


c. Objectives are ordered alphabetically at their hierarchical level, i.e. all parent Objectives are alphabetized, and their immediate child Objectives are alphabetized only within the parent Objective.




d. A chevron displays to to the left of any Objective with at least one child Objective . On click of the chevron, users can toggle the display of an Objective's child Objectives by either collapsing or expanding those nodes.

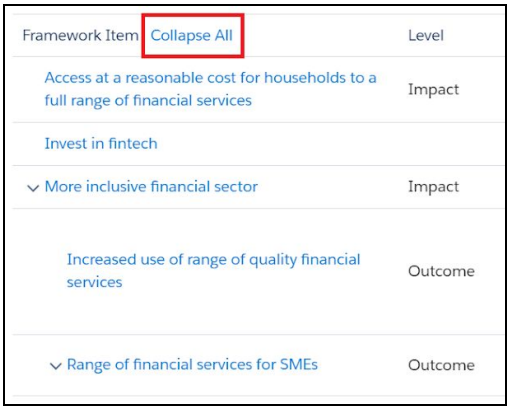
Expanded Objectives


Collapsed Objectives


If any of those child Objectives also have grandchild Objectives that are collapsed or expanded, those states are preserved on collapse and re-expansion of the grandparent Objective.

e. At the top of the table, there is an action link that displays either "Expand All" or "Collapse All" after "Framework Item" column header. A user can click "Expand All" to view all Objectives, including their child Objectives and grandchild Objectives, in the table.


A user can click "Collapse All" to hide all Objectives in the table except for the ones that do not have a parent Objective (that is, the highest level of Objectives).




## Add Project Indicators to ManageFramework Table

a. See the next section - "Manage Indicators" - for instructions on how to add Indicators to a Project and then associate with one or more Objectives. Make sure that the Objectives field is added to the (i) "Add New Indicator" pop-up through the ADD_NEW_INDICATOR_POPUP field set on Indicator object and (ii) the Edit indicator pop-up through the EDIT_PROJECT_INDICATOR_POPUP field set on Project Indicator object.[2] This will allow users to tag Project Indicators with the relevant objective(s).

[2] Field Sets can only be customized in Salesforce Classic.

b. Once a Project Indicator is associated with an Objective, that Project Indicator will appear next to the related Objective in the Framework Table. A Project Indicator can be related to multiple Objectives and will appear adjacent to all related Objectives.

| | | | |
|---|---|---|---|
| Women's community empowerment | Impact | PO-0133 | |
| Women's financial empowerment | Impact | PO-0121 | # of money management workshops |
| Women's political empowerment | Impact | PO-0116 | % of women at local political events (rallies, town halls, etc)<br>% of women voters |
| Easier access to polling stations for women | Outcome | PO-0120 | % of women voters |
| More women voters | Output | PO-0118 | % of women voters |

Likewise, multiple Project Indicators can be associated with a single Objective, and all Indicators will appear adjacent to that related Objective.

| | | | |
|---|---|---|---|
| Women's political empowerment | Impact | PO-0116 | % of women at local political events (rallies, town halls, etc)<br>% of women voters |

**Add Project Indicator-related Data to ManageFramework**

Once a Project Indicator is associated with an Objective and displayed in the Framework table, the user can display additional information related to the Project Indicator. To add/remove fields from the Project Indicator object, refer to the 'Customize Field Sets' section of the *Installation Guide*[3].

Some fields to add/remove include:

1. Baseline: Actual results that were in place at the time a project started. This data is used as a comparative point when collecting results.

[3] Field Sets can only be customized in Salesforce Classic.

*How to populate this field:* This number field is populated in the Edit Project Indicator pop-up on the ManageIndicators page. Ensure the field has been added to the field set if it doesn't display in the pop-up initially. This is relevant only for currency, number, and percent indicators.

2. Life of Project Target: The target to be met by the end of the project.
   *How to populate this field:* This number field is populated in the Edit Project Indicator pop-up on the ManageIndicators page. Ensure the field has been added to the field set if it doesn't display in the pop-up initially. This is relevant only for currency, number, and percent indicators.

3. Target to Date: Result records pulled from the SetTargets page.

4. Result to Date: Result records pulled from the AddResults page.

Add New Framework Item

| Indicator Description | Data Source | Baseline | Target To Date | Result To Date |
|---|---|---|---|---|
| Number of people living below the national poverty line level | IOF Survey, INE | 500,000 | | 184,500 |
| Number of jobs created | INCAF Survey | 300 | 250 | 350 |

To populate the Target to Date and Result to Date fields, the user has to first indicate if the Project Indicator's data is collected in a cumulative or non-cumulative manner. Populate the 'Cumulative' checkbox for the Project Indicator first

- If a Project Indicator is marked as **cumulative**, then the latest reported Result/Target is the value that will populate the fields Result_To_Date__c and Target_To_Date__c respectively
- If a Project Indicator is marked as **non-cumulative**, then the Sum of the reported values to date is the value used to populate the fields Result_To_Date__c and Target_To_Date__c. .

Adding the 'Result to date,' and 'Target to date' fields to ManageFramework page allows users to view and report on the progress made on the project indicators within the logframe.

The following table outlines segments quantitative project indicators by their various characteristics to display where a 'Result to Date' and 'Target to Date' is mathematically possible and accurate:

| Data Type | Cumulative? | Disaggregation Level(s) | Result records fields used in Calculation | | Across which Reporting Period(s) |
|---|---|---|---|---|---|
| | | | Target to Date | Result to Date | |
| **Number** | Yes | None | Total Target Value | Total Result Value | Only most recent |
| | | Cross-Disaggregated by Sex | Total Target Value | Total Result Value | Only most recent |
| | | Disaggregation Group | Sum of Total Target Value | Sum of Total Result Value | Only most recent |
| | | Disaggregated by Sex & Group | Sum of Total Target Value | Sum of Total Result Value | Only most recent |
| | No | None | Sum of Total Target Value | Sum of Total Result Value | All |
| | | Cross-Disaggregated by Sex | Sum of Total Target Value | Sum of Total Result Value | All |
| | | Disaggregation Group | Sum of Total Target Value | Sum of Total Result Value | All |
| | | Disaggregated by Sex & Group | Sum of Total Target Value | Sum of Total Result Value | All |
| **Currency** | Yes | None | Total Target Value | Total Result Value | Only most recent |
| | | Cross-Disaggregated by Sex | Total Target Value | Total Result Value | Only most recent |
| | | Disaggregation Group | Sum of Total Target Value | Sum of Total Result Value | Only most recent |
| | | Disaggregated by Sex & Group | Sum of Total Target Value | Sum of Total Result Value | Only most recent |
| | No | None | Sum of Total Target Value | Sum of Total Result Value | All |
| | | Cross-Disaggregated by Sex | Sum of Total Target Value | Sum of Total Result Value | All |

| | | | | | |
|---|---|---|---|---|---|
| | | Disaggregation Group | Sum of Total Target Value | Sum of Total Result Value | All |
| | | Disaggregated by Sex & Group | Sum of Total Target Value | Sum of Total Result Value | All |
| **Percent*** | Yes | None | Total Target Value | Total Result Value | Only most recent |
| | | Cross-Disaggregated by Sex | Total Target Value | Total Result Value | Only most recent |
| | No | None | Total Target Value | Total Result Value | Only most recent |
| | | Cross-Disaggregated by Sex | Total Target Value | Total Result Value | Only most recent |

* Target to Date and Result to Date will only be populated for a *Percent* Project Indicator if the Project Indicator is associated with only one Geographic Area and if the Project Indicator does not have a Disaggregation Group. If there is either a Disaggregation Group or more than one Geographic Area, these two fields will remain empty on the Project Indicator record.

# Manage Indicators

Overview: The Manage Indicators page is used to control which Indicators (catalog and/or custom) should be reported for a Project and how they should be reported (frequency, disaggregation, etc).

## Create Project Indicator records from the Indicators Catalog tab

On the ManageIndicators page is a tab labeled, 'Indicators Catalog.' This tab allows users to view a list of standard indicators that can then be added to multiple projects (see screenshot below). This catalog can be set-up by uploading the indicators using a tool such as dataloader.io and can streamline project setup and facilitate better reporting and aggregation of data.


Within the Indicators Catalog, users may browse through all Indicator records in a table format.

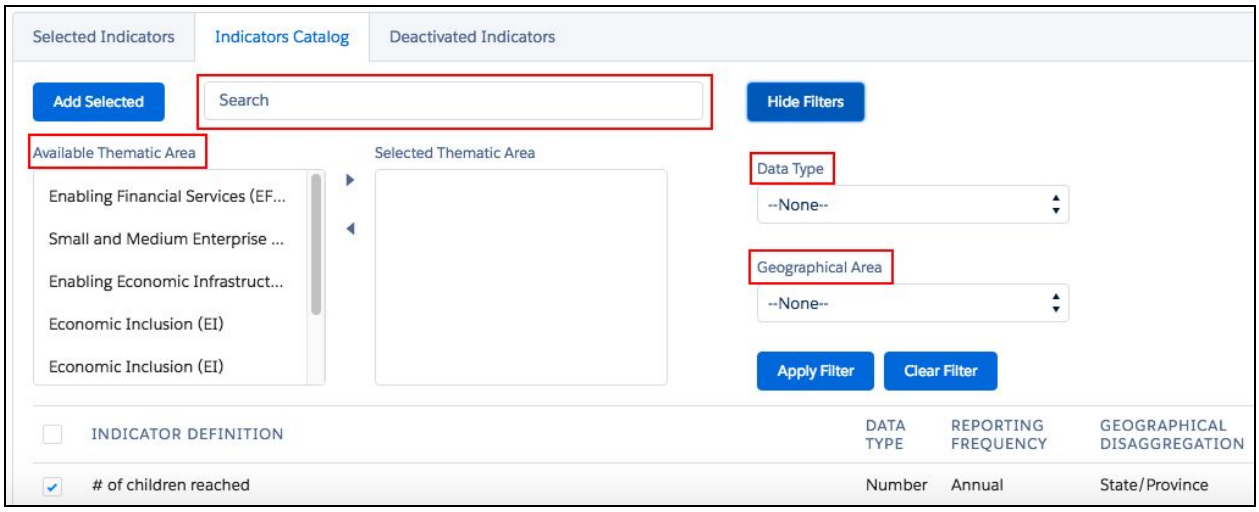
a. The columns in the table, which are based on various attributes about the indicators, such as Data Type and Reporting Frequency, are defined and can be customized by users using the CATALOG_INDICATORS_TABLE field set on the Indicator__c object.
b. The table will display all Indicator records which do not have a child Project Indicator record related to the current Project.
    i. Clicking on a column header sorts the Indicators alphabetically by the selected field. Clicking on the column header a second time sorts them in reverse alphabetical order by the selected field.

ii. If the table includes any "Icon" fields, for example for Aim, Thematic Area, and/or Data Type, it is not possible to sort the table by those fields. Clicking on the column header will not result in any change in sorting of the table.

iii. The table displays 10 Indicator records at a time. Other Indicators can be accessed via the pagination at the bottom of the table.

 **NOTE**: Fields may be added to the Selected Indicators Table by navigating to the SELECTED_PROJECT_INDICATORS_TABLE field set on Project_Indictor__c object. Fields may be added to the Indicators Catalog Table by navigating to the CATALOG_INDICATORS_TABLE field set on Indicator__c object.

c. Search for and filter Indicator records




i. As text is entered into the Search bar (see screenshot above), the Indicators displayed in the table are filtered down by those whose Indicator Definition, Data Type, or Thematic Area contain the input text.

ii. Clicking the Show More Filters button opens up filters for:

a. Thematic Area - The Thematic Area filter contains the names of all Thematic Areas which have a Project Thematic Area with the current Project. When values are selected and applied, only Indicators with an Indicator Thematic Area record whose Thematic Area matches one of the selected values will be rendered in the table.

b. Data Type - The Data Type filter contains all picklist values from the Data Type field on the Indicator object. When a value is selected and applied, only Indicators with the selected Data Type will be rendered in the table.

c. Geographical Area - The Geographical Area filter contains all picklist values from the Geographical Disaggregation field on the Indicator object. When a value is selected and applied, only Indicators with the selected Geographical Disaggregation will be rendered in the table.

iii. Searching and filtering work in conjunction. Indicator records will be displayed in the table if they meet criteria for both the search input and the filters.

d. To create Project Indicator records from the Indicators Catalog, the user can click the checkbox on the left of all relevant rows of Indicator data in the table and click the *Add Selected* button.


e. When the *Add Selected* button is clicked, Project Indicator records and any applicable junction records are created. The Indicator is then removed from the Indicators Catalog table and added to the Selected Indicators table.

f. The user is then taken to the Selected Indicators page.

> ☐ **NOTE**: Project Indicators are displayed in alphabetical order and newly added indicators from the Indicators Catalog will display in alphabetical order.

g. Selections apply only for the current page of Indicators. If the user selects Indicators from one page, but navigates to a new page, the selected indicators from the previous page are disregarded when the *Add Selected* button is clicked.

### Create custom Project Indicator records from the Selected Indicators tab

Create custom indicators for the current project and manage indicators that have already been added to the project.

a. When the *Add New Custom Indicator* button is clicked, a pop-up opens. This pop-up displays the fields in the ADD_NEW_INDICATOR_POPUP field set on the Indicator object. You can use the field set to control which fields are displayed in the pop-up for the user to enter information on while creating the new project indicator.[4]


[4] Field Sets can only be customized in Salesforce Classic.

b. When creating a new Project Indicator, certain fields are required to ensure the Indicator is accurately created in the Project. All new Project Indicators require an Indicator Definition, Data Type, Reporting Frequency and Geographic Disaggregation. All other attributes for a Project Indicator are voluntary but users can add new required fields to the field set per their organization's requirements.

c. On the 'Add New Custom Indicator' popup is a field labeled '*Include in Catalog?*' This checkbox field controls the availability of the Indicator to the projects created. When creating a custom Indicator, the Indicator can either be:

   i. Added to only the current Project (Include_in_Catalog__c = FALSE)

   ii. Added to the current Project and made available to all other Projects (Include_in_Catalog__c = TRUE)

By default, the field Include_in_Catalog__c is selected as TRUE (that is, it is checked), which adds the Indicator to the Selected Indicators table for the current project and the Indicator Catalog for all other projects.

If the field is FALSE (that is, it is unchecked), the Indicator will only be added to the Selected Indicators table for the current project. If the Indicator is later removed from a project, then the Indicator will display in the Indicator Catalog for that project, and it will not display in the Indicator Catalog for any other project.

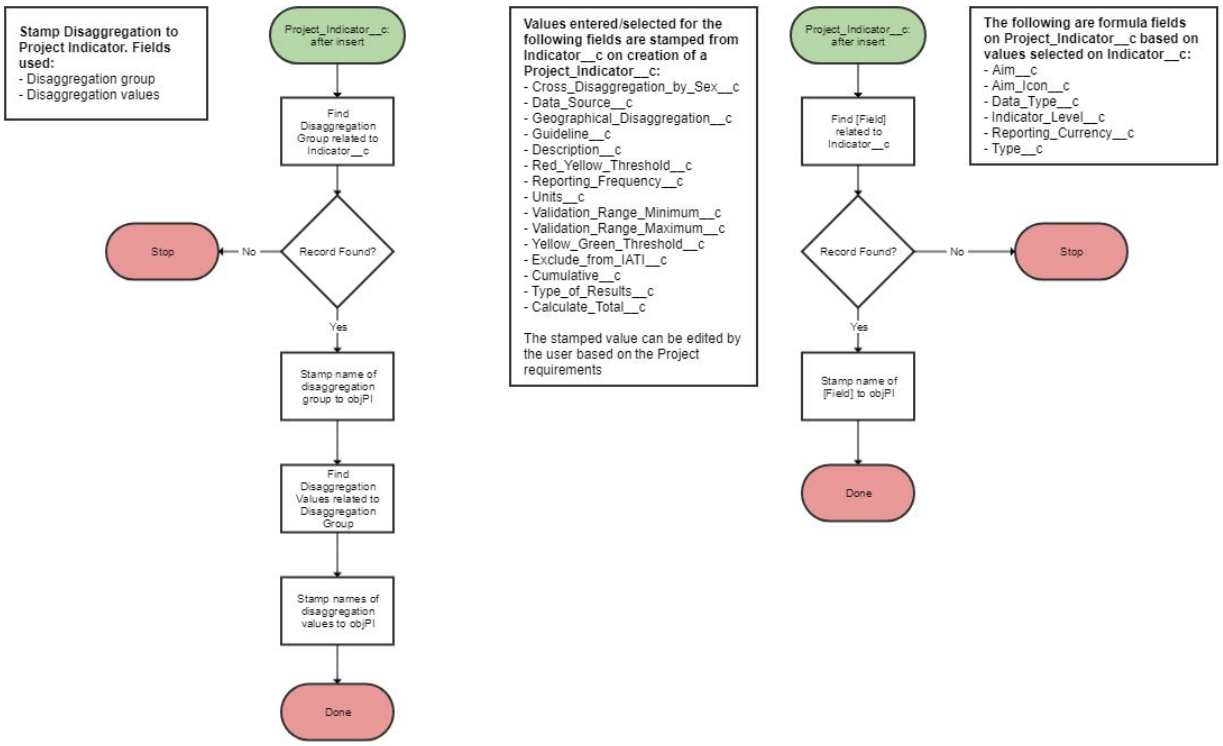
d. When the user clicks Save:

   i. A new Indicator record is created with the input data.

   ii. A Project Indicator record is created child to the current Project and the newly created Indicator record. The following diagram describes the relationship between data on the Indicator record and the Project Indicator record:

Data from some fields is *stamped* from the Indicator to Project Indicator record. This data can be modified and customized for the Project Indicator record and does not impact the Indicator record.

Data from some fields on the Indicator record *carry over* to the Project Indicator record using formula fields. This data cannot be modified for the Project Indicator record.




e. View all the Project Indicator records related to the project in a table format
   i. The columns in the table, which are based on various attributes about the indicators, such as Data Type and Reporting Frequency, are defined and can be customized by users using the Selected Project Indicators Table field set on the Project_Indicator__c object.
   ii. Each Project Indicator's Indicator Definition field will be a hyperlink. If clicked, it opens the record detail page in a new tab.

 **NOTE**: This hyperlink will be determined by the profile settings for the user. Organizations can enable/disable access for users to the Project Indicator detail page.

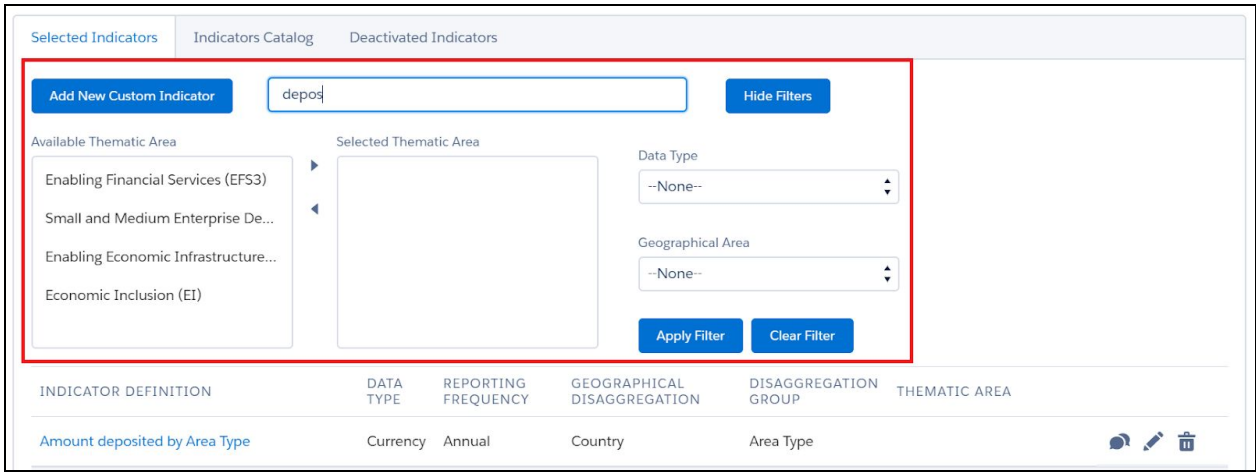
iii. Clicking on a column header sorts the Project Indicators alphabetically by the selected field. Clicking on the column header a second time sorts them in reverse alphabetical order by the selected field.

iv. If the table includes any "Icon" fields, for example for Aim, Thematic Area, and/or Data Type, it is not possible to sort the table by those fields. Clicking on the column header will not result in any change in sorting of the table.

v. The table displays 10 Project Indicator records at a time. Other Project Indicators can be accessed via the pagination at the bottom of the table.

f. When the Comment icon is clicked, a pop-up window opens where the user can enter comments about the Project Indicator. On click of *Save*, these comments are saved to the Project Indicator's Notes field. On click of *Cancel*, any changes made are discarded.

g. Search for and filter Project Indicator records related to the project




i. Searching and filtering work in conjunction. Project Indicator records will be displayed in the table if they meet criteria for both the search input and the filters.

ii. As text is entered into the Search bar, the Project Indicators displayed in the table are filtered down by those whose Indicator Definition, Data Type, or Thematic Area contain the input text.

iii. Clicking the Show More Filters button opens up filters for:

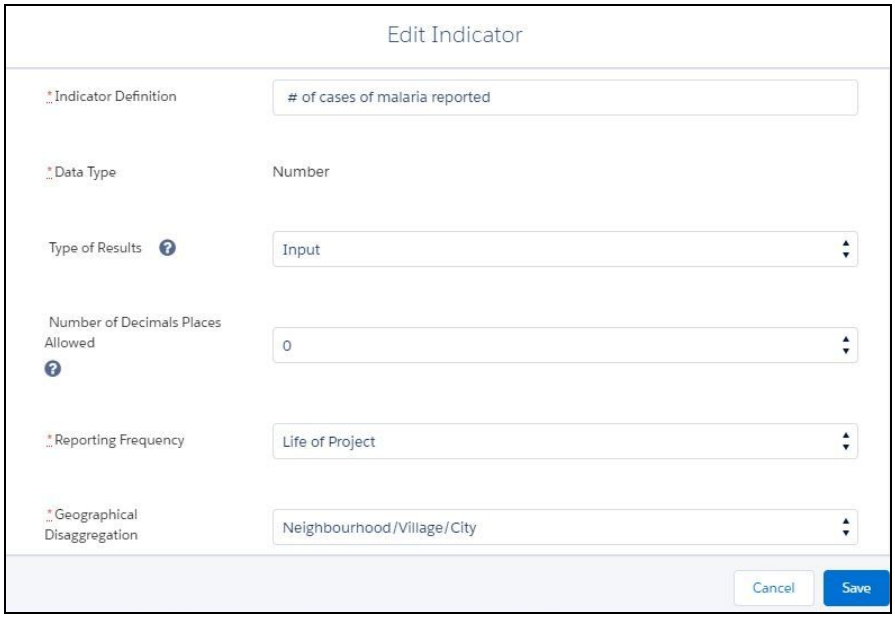
Thematic Area - The Thematic Area filter contains the names of all Thematic Areas which have a Project Thematic Area with the current Project. When values are selected and applied, only Project Indicators with a Project Indicator Thematic Area record whose Thematic Area matches one of the selected values will be rendered in the table. The Thematic Area filter is a multi-select picklist and users can select one or more Thematic Area to search based on. If more than one Thematic Area is selected, the system uses OR logic to filter the results, that is, the list of indicators displayed match at least one of the Thematic Areas selected.

Data Type - The Data Type filter contains all picklist values from the Data Type field on the Indicator object. When a value is selected and applied, only Project Indicators with the selected Data Type will be rendered in the table.

Geographical Area - The Geographical Area filter contains all picklist values from the Geographical Disaggregation field on the Project Indicator object. When a value is selected and applied, only Project Indicators with the selected Geographical Disaggregation will be rendered in the table.

### Modify Project Indicator records related to the project

a. When the Edit icon is clicked, the *Edit Indicator* pop-up window opens.



b. This pop-up displays the fields contained in the EDIT_PROJECT_INDICATOR_POPUP field set on the Project_Indicator__c object. Adding or removing fields from the field set will control which fields show in the pop-up.[5]

   i. Some fields are not editable on the Project Indicator through the Edit icon. If a user chooses to display the following fields in the field set - Aim, Data Type, Reporting Currency - these will not be editable since these are formula fields from the Indicator object. The rationale for creating these as formula fields is that editing any of these attributes significantly alters the meaning of that Project Indicator and for data integrity purposes, changing those fields should require creating a new indicator.

   ii. For each Project Indicator, users can choose the number of decimal points for data entry per your reporting requirements. When a Project Indicator is created, by default, it is set to be reported with no decimal points. Change and customize this per Project Indicator to increase the number of decimal points by adding the *Number of Decimal Places Allowed* field to the field set or by opening the particular Project Indicator record. This field supports up to 2 decimal places.

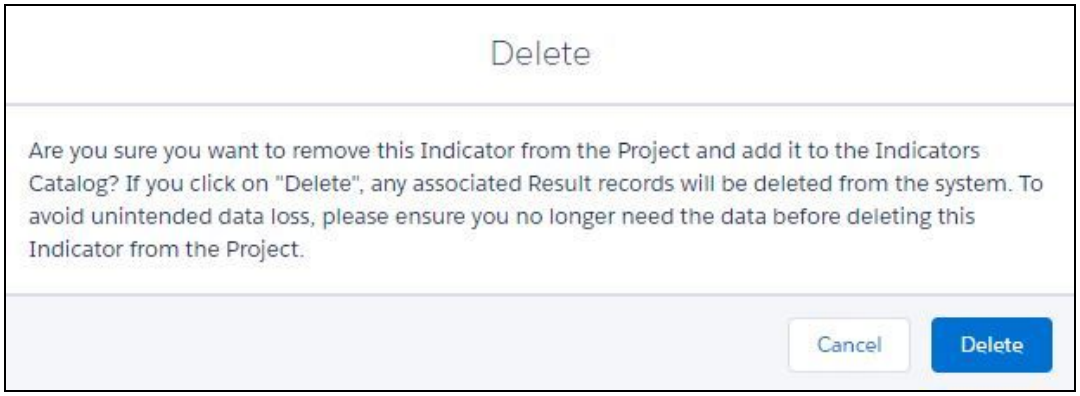
   iii. If a user chooses to add Reporting_Currency__c to this field set, the value will be displayed but will not editable through the edit icon. In addition, this field will display a blank for any Project Indicator with Data Type ≠Currency

## Remove Project Indicator records related to the Project

Amp Impact has two options for removing Project Indicators from a project: **deletion** and **deactivation**.

a. A Project Indicator record can be deleted by clicking on the *Delete* (trash bin) icon next to the Project Indicator in the Selected Indicators table. On click of the *Delete* icon, the user will be prompted to confirm the delete action.

[5] Field Sets can only be customized in Salesforce Classic.




When the deletion is confirmed, the Project Indicator record is deleted, along with any of its associated records (i.e. Results, Project Indicator Reporting Period, Project Indicator Geographic Area, etc.). The Project Indicator and its related data are no longer displayed on any of the Visualforce pages.

b. A Project Indicator can be deactivated by editing a Project Indicator in the Selected Indicators table and de-selecting the Active checkbox and setting it to FALSE. When the record is saved, the Project Indicator record is no longer displayed on any of the Visualforce pages - except for ManageIndicators, where it is moved to the *Deactivated Indicators* tab.

 **NOTE**: When a Project Indicator is deactivated, any Project Indicator Reporting Period records that have a Start Date after the deactivation date are deleted so no empty records exist in the system.

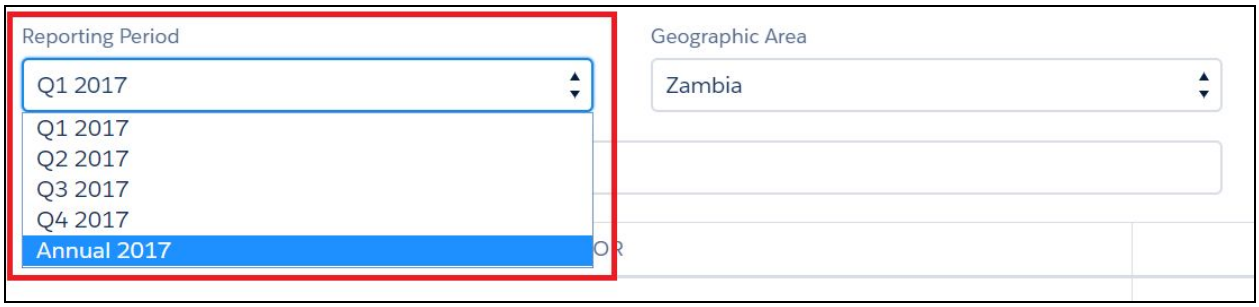
# Set Targets

Overview: Set target values for project indicators based on their reporting frequency (monthly, quarterly, annual for example) and geographic level (country, district, province for example)

## Set Targets by Reporting Period and Geographic Area

a. The Reporting Period picklist displays the Reporting_Period_Name field of all Reporting Periods which have a child Project Indicator Reporting Period record related to one of the current Project's Project Indicators. Reporting Periods are primarily sorted in ascending order by their Reporting Period End Date field.

 **NOTE**: If multiple Reporting Periods have the same Reporting Period End Date value, then those Reporting Periods are subsequently sorted in descending order by their Reporting Period Start Date.




b. Optional: A default Target Reporting Period can be selected for the Project which controls the Reporting Period displayed on the filter above when any user first navigates to the Set Target page.

By default, the Reporting Period displayed in the filter will be the first one recorded according to End_Date_c. In order to select a different default Target Reporting Period, the user must:

1. Ensure that the Default_Targets_RP_Id__c field is displayed on the Page Layout. To display the field, go to Object Manager>>Projects>>Page Layout.

2. Navigate to the Reporting Period to display by default and copy the 18-digit Salesforce ID found in the URL of the record.

3. Navigate to the 'Details' page of the Project and paste the 18-digit ID into Default_Targets_RP_Id__c field.

c. The Geographic Area picklist displays the Name field of all Geographic Areas which have a child Project Indicator Geographic Area record related to one of the current Project's Project Indicators. Geographic Areas are shown in alphabetical order. If a Geographic Area has a Parent Geographic Area, it is grouped and alphabetized under its Parent Geographic Area.

d. When a value is selected in either the Reporting Period or the Geographic Area, all Project Indicators which have a child Project Indicator Reporting Period record related to the selected Reporting Period and a child Project Indicator Geographic Area record related to the selected Geographic Area will be displayed on the page.

e. Target data is auto-saved for each input field after the user enters a value and clicks out from the data input cell. If no targets had been previously entered for a Project Indicator for that Geographic Area and Reporting Period, the target data is saved into a new Result record. If targets had previously been entered for a Project Indicator for that Geographic Area and Reporting Period, the target data is updated in the existing Result record.

f. When a value is first entered in the Set Targets table, the Target Created Date and Target Last Modified Date custom fields on the corresponding Result record will be populated with the current date/time. When a value is later updated, the Target Last Modified Date custom field will be re-populated with the current date/time.

g. Collect target data disaggregated by custom-defined groupings such as sex, age group, type of beneficiary.

| PROJECT INDICATOR | TOTAL | MALE | FEMALE | UNKNOWN |
|---|---|---|---|---|
| Loan amount disbursed | 160,000.00 USD | 45,000.00 USD | 70,000.00 USD | 45,000.00 USD |
| 18-29 | 20,000.00 USD | 5,000.00 USD | 10,000.00 USD | 5,000.00 USD |
| 30-45 | 80,000.00 USD | 20,000.00 USD | 40,000.00 USD | 20,000.00 USD |
| 46-59 | 45,000.00 USD | 15,000.00 USD | 15,000.00 USD | 15,000.00 USD |
| 60+ | 15,000.00 USD | 5,000.00 USD | 5,000.00 USD | 5,000.00 USD |
| Number of loan recipients | 21,000.00 | 7,000.00 | 7,000.00 | 7,000.00 |
| Percent of borrowers with 2+ loans | % | % | % | % |

The number of input fields per indicator is controlled by the Cross-Disaggregation by Sex field and the presence of a child Disaggregated Project Indicator record.

i. If the Project Indicator's Cross-Disaggregation by Sex checkbox is checked, input fields are displayed in the Male, Female, and Unknown column.

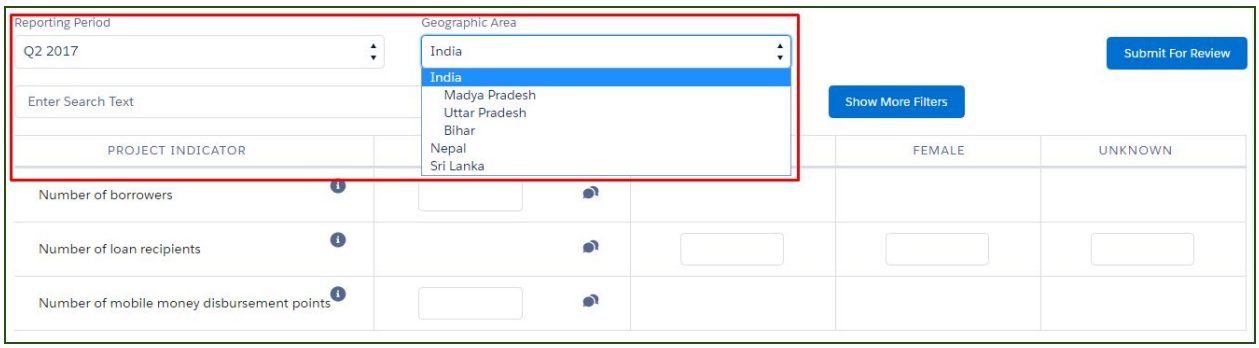
- If the Data Type is Percent, an additional input field is displayed in the Total column as well.
- If the Data Type is Currency or Numeric, an output field is displayed in the Total column that shows a summation of any values entered in the Female, Male and Unknown input fields.
- If the Data Type is Milestone or Qualitative, no input or output field is displayed in the Total column.

ii. If the Project Indicator has a child Disaggregated Project Indicator record, there will be a row of input fields for each Disaggregation Value related to the Disaggregated Project Indicator's parent Disaggregation Group.

h. Each Project Indicator row has a Comments icon. When clicked, a Comments pop-up window displays to track any notes/guidelines the user wants to track. These are saved to the Comments field on the Result object.

i. Each Project Indicator row has an Information icon In the Project Indicator column. When the user hovers over the icon, the Project Indicator fields in the Set Targets Info Popover field set on the Project Indicator object display as a pop-over.


Select a reporting period and geographic area to set targets for all indicators reporting at that geographic level and reporting frequency.




Capture target data for indicators in a variety of qualitative and quantitative data formats.


The Set Targets page includes input fields into which the users can enter specific targets. The format of these input fields vary based on the Project Indicator's Data Type.

i. For the three numerical data types (Currency, Number, and Percent):
   - Only numbers, ".", and "-" are accepted as inputs.
   - Up to 16 digits can be entered before the decimal place, and 2 digits can be entered after the decimal place.

ii. If the Data Type is Currency, all input fields will display the Project Indicator's Reporting Currency value to the right of the input field.

iii. If the Data Type is Percent, all input fields will display a percentage sign to the right of the input field.

iv. If the Data Type is Milestone, all input fields will display a picklist input field with Yes and No as potential values.

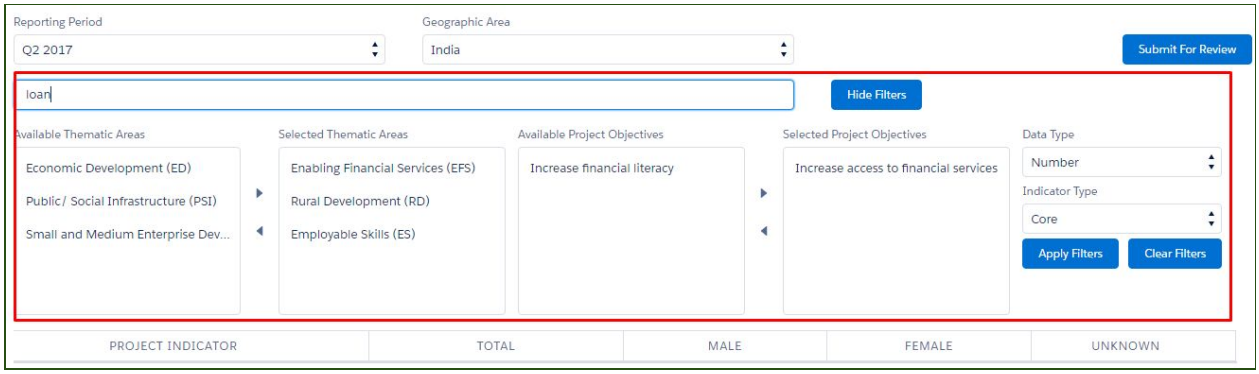
v. If the Data Type is Qualitative, a plus icon will display. When clicked, a pop-up will display and accept rich text input.

**Use search and filters to set targets for specific types of indicators**

a. As text is entered into the Search bar, the Project Indicators displayed on the page are filtered down by those whose Indicator Definition, Data Type, or Thematic Area contain the input text.
b. Clicking the Show More Filters button opens up filters for:
   i. Thematic Area - The Thematic Area filter contains the names of all Thematic Areas which have a Project Thematic Area with the current Project. When values are selected and applied, only Project Indicators with a Project Indicator Thematic Area record whose Thematic Area matches one of the selected values will be rendered in the table.
   ii. Project Objective - The Project Objective filter contains the names of all the Objectives which have a child Project Objective record with the current Project. When values are selected and applied, only Project Indicators with an Project Indicator Objective record whose Objective matches one of the selected values will be rendered in the table.

iii. Data Type - The Data Type filter contains all picklist values from the Data Type field on the Indicator object. When a value is selected and applied, only Project Indicators with the selected Data Type will be rendered in the table.

Searching and filtering work in conjunction. Indicator records will be displayed in the table if they meet criteria for both the search input and the filters.




## Validation Ranges and Live Error Checking for target values

Set up validation ranges for indicators to facilitate better data quality.

a. Through the *Amp Impact Admin* custom setting (refer to *Installation* guide for access and set-up details), an organization can choose to enable/disable the Validation Ranges feature. This feature allows users to indicate a minimum and maximum value for indicators with data type = number, currency, percent and be able to live error-check if the values entered in the input fields are within the range of expected values.

b. For an organization to utilize this feature, the fields *Validation Range Minimum* and *Validation Range Maximum* must be populated on Project Indicators.

   To ensure that these fields are available when creating an Indicator, an organization can add them to the Add New Custom Indicator pop-up by adding them to the ADD_NEW_INDICATOR_POPUP field set on the Indicator object.

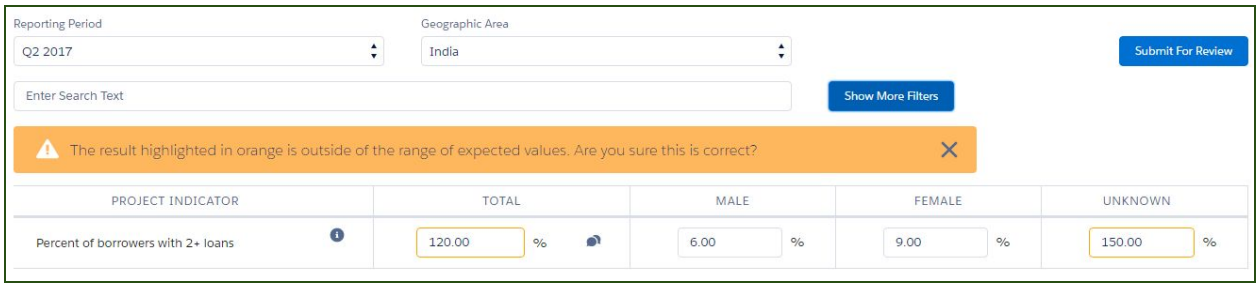
To ensure that these fields are available when editing a Project Indicator, an organization can add them to the Edit Project Indicator pop-up by adding them to the EDIT_PROJECT_INDICATOR_POPUP field set on the Project Indicator object.[6]

c. Each project indicator can have its own minimum and maximum value and the fields can be added to the relevant field sets on the Indicator__c and Project_Indicator__c objects.

d. If the Project Indicator has a Validation Range Minimum value and the user enters a value less than the Validation Range Minimum, a warning message appears at the top of the page, but the value is still saved.

e. If the Project Indicator has a Validation Range Maximum value and the user enters a value greater than the Validation Range Maximum, a warning message appears at the top of the page, but the value is still saved.

f. Users can click on the "x" next to the warning message when it first appears and continue entering target values. The message will not re-appear if another value is entered outside the expected range once warning message has been closed by the user. However, the warning message will re-appear if the user navigates away from the Set Targets page and then returns to it.

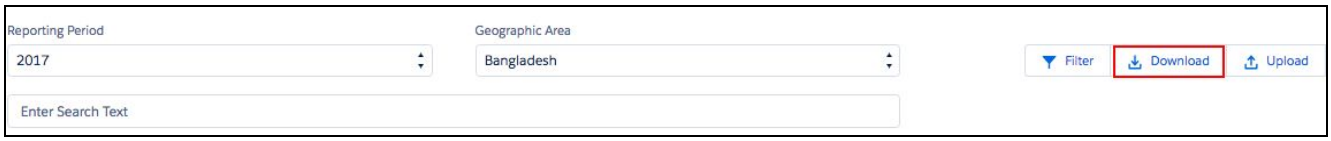



## Download Targets data to an Excel file

a. To download Indicators for a specific project, reporting period and geographic area, the user clicks the "Download" button.

[6] Field Sets can only be customized in Salesforce Classic.

b. User can decide which Targets are downloaded by applying Filters (using the Filter button and/or the Search text bar). On open, the excel file will contain only targets that match the filters applied at time of download.

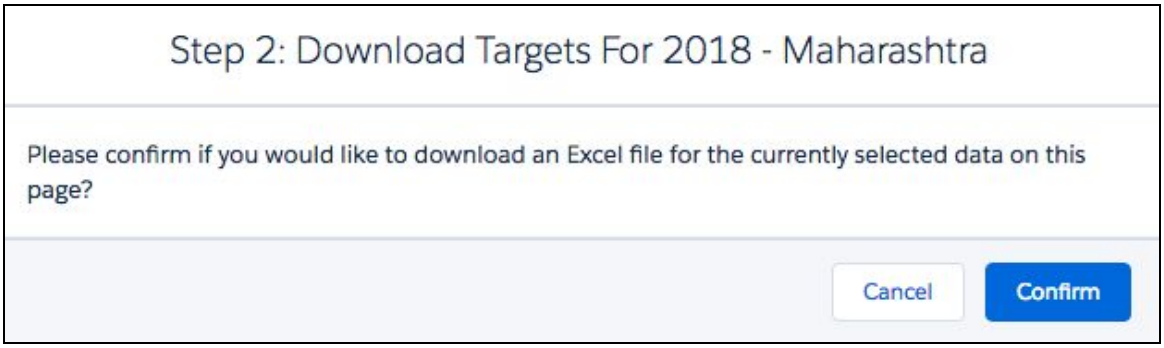



c. OnClick of the *Download* button, a pop-up opens. Using custom labels, the user may edit/customize the following in the 'Generate' pop-up: Generate_Excel_Text,Generate_Excel_Button, Generate_Excel_Header.


d. The *Generate* pop-up will ask the user to confirm generating the excel sheet for the particular reporting period and geographic area selected. In this pop-up, the user can either click 'Generate' or 'Cancel'.
   i. If there is no project indicator linked to a geographic area and reporting period, then selecting 'Generate' will prompt an error message.
   ii. Selecting 'Cancel' will exit from the 'Generate' pop-up. The page will remain on the SetTargets page.

e. If there is at least one project indicator linked to a geographic area and reporting period, then selecting 'Generate' will prompt a *Confirm* pop-up. Using custom labels, the user may edit the following in the *Confirm* pop-up: Download_Targets_Header.

f. The *Confirm* pop-up will ask the user to confirm the download of the excel sheet for the particular reporting period and geographic area selected. In this pop-up, users can either click 'Confirm' or 'Cancel'.
   i. Selecting 'Cancel' will close the pop-up and the user will remain on the SetTargets page.
   ii. Selecting 'Confirm' will prompt the download of the excel file onto the SetTargets page.




g. Once 'Confirm' has been selected, the file will download. OnOpen of the file, 2 tabs will be shown
   i. The first tab will contain a set of instructions on how to use the downloaded file and on how it may be edited to remain compatible with the system for a re-upload
   ii. The second tab will contain the data and information from the SetTargets page. This tab will also display, below the header, the date and time of download, and the name of the user who downloaded the file.

h. The file will also be stored in the ContentVersion object. If a user downloads an excel file multiple times for the same geographic area and reporting period, the File record will update with the latest version. The user may access all of the versions that have been downloaded by selecting 'View previous versions'.

## Upload Targets data from an Excel file

a. Through the *Set Targets* custom setting (refer to *Installation* guide for access and set-up details), an organization can turn enable/disable the ability for users to access the upload excel button.


b. On the SetTargets page, the 'Download' button will appear in the top right corner of the screen. Selecting that button will prompt the user to go through the steps to download the Targets for a given reporting period and geographic area. See the section above on downloading targets as an excel file.

c. OnOpen of the newly downloaded excel sheet, there will be 2 tabs

   i. The first tab will be labeled as, "Instructions' - this tab will outline how to enter data in a compatible format to upload the document into the SetTargets page

   ii. The second tab will change dynamically to reflect the reporting period and geographic area, and will formatted as such - '[Reporting Period label] - [Geographic Area name]'

d. Data may be added to the excel sheet

   i. The following may be edited:

      1. The number of tabs
      2. The values in the input cells which are indicated by the blue background

   ii. The following portions of the excel sheet may **not** be edited in order to ensure they are compatible with the Upload feature

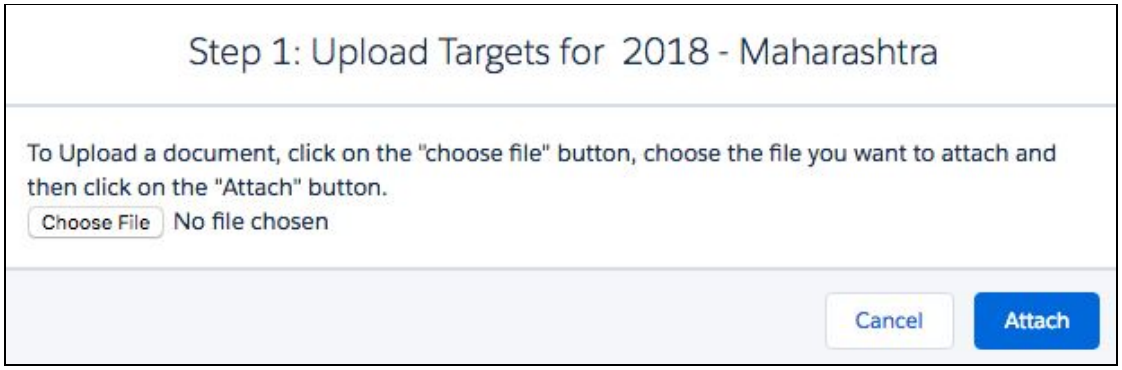
      1. The header text on the tab with the downloaded data

2. The names of the column headers in the downloaded tab
3. The name of the downloaded tab
4. The existence of one tab with the Reporting Period and Geographic Area as the label

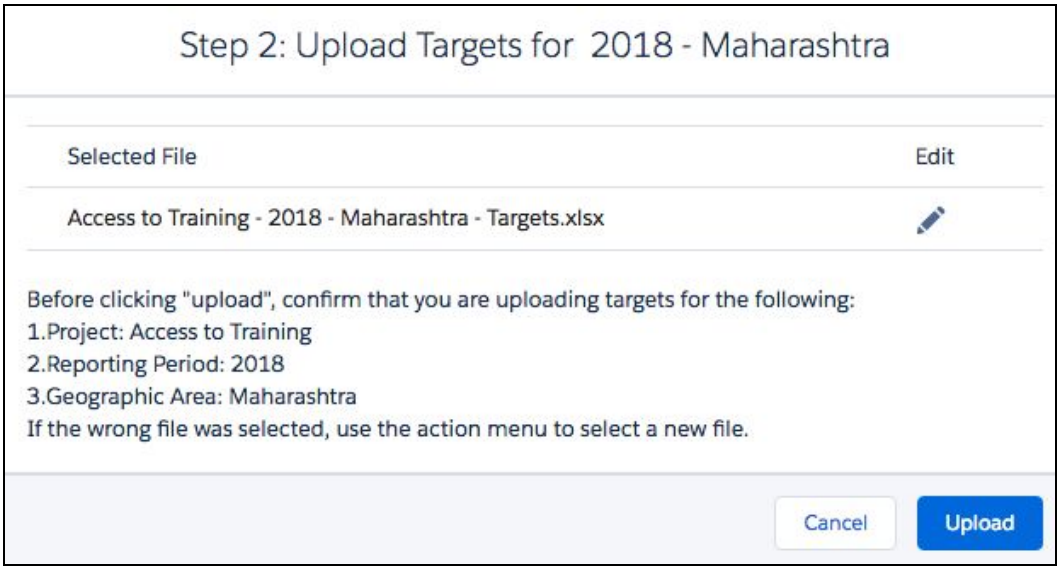
e. Once data has been entered into the excel sheet, the user must navigate to the SetTargets page and click the *Upload* button in the top right corner of the screen

f. *Step 1* - Selecting the *Upload* button will prompt a popup to allow the user to attach the file to be uploaded for that particular geographic area and reporting period

   i. The user may click *Cancel* at any time and return to the SetTargets page, with no records updated




g. *Step 2* - When choosing a file, ensure that the file type is 'xlsx.'. Clicking "Attach" will prompt the next popup.



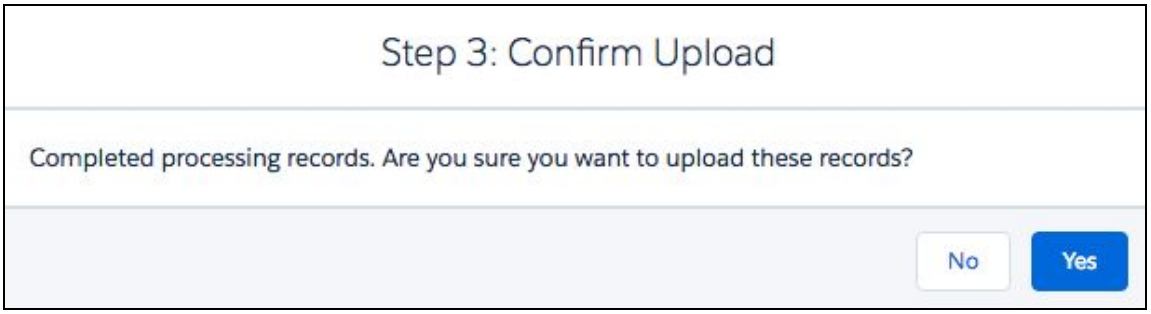

h. Once the upload popup appears, click on the "Upload" button. This popup will confirm the **reporting period, geographic area,** and **project name**.

i. At this step, an error message will appear onclick of "Upload" if the uploaded document is not in the .xlsx format, in which case, the user must revisit the document to be uploaded and edit it to make it compatible.

j. *Step 3* - Once the upload is complete, a "Confirm Upload" popup will appear. The popup will ask the user to confirm that the records uploaded should update the targets for the chosen reporting period and geographic area

   i. Selecting "No" will cancel out of the popup, with no records updated

   ii. Selecting "Yes" will confirm the upload and the records will update




k. *Step 4* - Once the user has selected "Yes," there will be a popup that reads "Operation Complete," with the number of successfully updated records and the number of errors that occured.


i. On this popup, there are several buttons:

1. "View Successes" - selecting this shows the user the successful uploads. Clicking on *View Successes* button will download an excel file with all of the indicators that successfully uploaded. This file will download on the SetTargets page and a record on ContentVersion will also be created.

    a. If there were no successes, the *View Successes* button will not display in Step 4

2. "View Errors" - selecting this shows the user an error log of records that could not be successfully uploaded and the associated errors. Clicking on *View Errors* button will download an excel file with all of the indicators that were unable to be uploaded with a column explaining what the error was. This file will occur on the STAR pages and a record on ContentVersion will also be created.

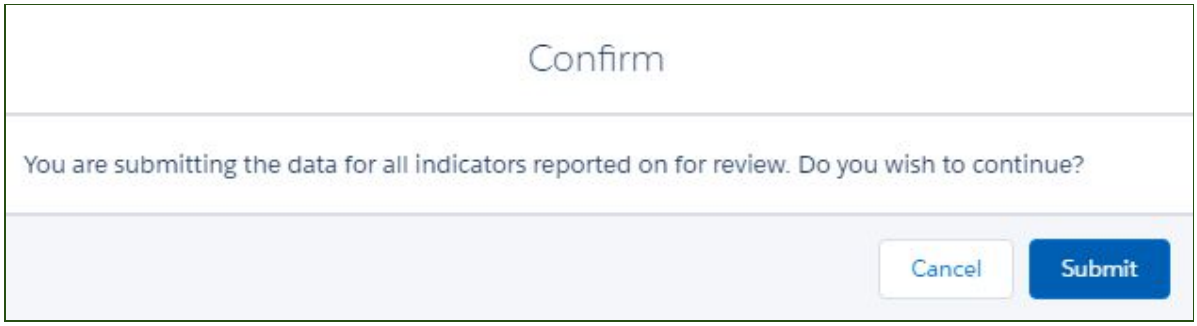
a. If no errors occurred, then the *View Errors* button will not display in Step 4

l. The user can download the success/error logs and then close the pop-up. This will automatically refresh the SetTargets page and display the newly updated records.

## Submit Targets for review

a. Through the *Amp Impact Admin* custom setting (refer to *Installation* guide for access and set-up details), an organization can choose to enable/disable the Submit Targets feature.
b. Once data entry is complete for the targets for a given Reporting Period, the user clicks the "Submit" button. The text in the pop-up window that displays can be edited by users in the Confirm_Submit_Review custom label.


c. Customize a review process for setting targets to garner approval from relevant team-members.
d. Users are able to submit targets for multiple Reporting_Period__c records, if applicable. For example, a user can may need to submit targets for Chile for quarter 2 and the semi-annual report. They can go to the relevant reporting periods, enter data and then submit.
e. Users have the option to create workflows that trigger certain actions on the click of the Submit button. For example, clicking on the Submit button can set a specific Status and generate an email notification. The Target_Status__c field can also be configured through a workflow to edit the Targets_Locked__c field which can lock the target input fields for that Reporting Period and Geographic Area un-editable so that users can no longer make any changes to the data entered.
f. On the SetTargets page, the results display as output fields when
    i. The field Target_Locked__c = TRUE for a reporting period, OR
    ii. A user submits the page for review.




g. When the results appear as output fields, the user cannot edit the targets entered. Project Indicators with Data Type = Qualitative will display a *View* icon.
h. Once the user clicks the *Submit* button, the *Upload* button is greyed out to prevent any additional targets from being uploaded.

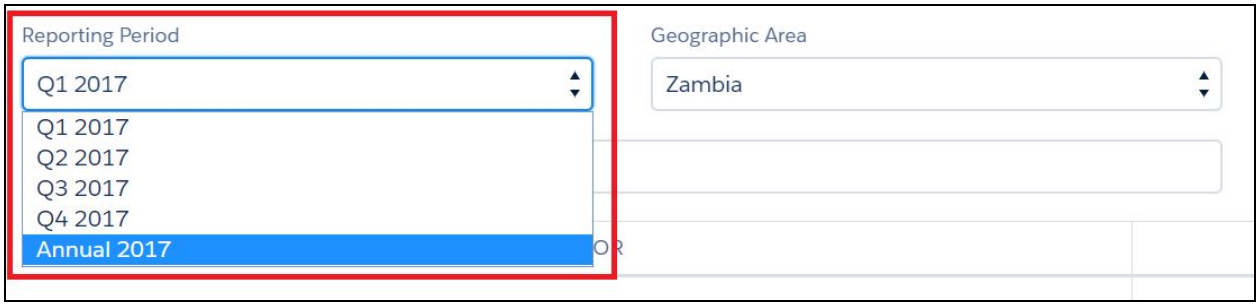
# Add Results

Overview: Track result data for project indicators based on their reporting frequency (monthly, quarterly, annual for example) and geographic level (country, district, province for example).

This page mirrors the functionality and appearance for the Set Targets page, with the following key difference: the Add Results page includes a second column that displays previously entered targets next to the column that displays input fields where users enter the actual results. This allows for easy comparison of result values with defined target values (if set). Functionally, Result records will be updated if a user sets a result value for any Result record with an existing target value OR Result records will be created if no record currently exists.

## Add Results by Reporting Period and Geographic Area

a. The Reporting Period picklist displays the Reporting Period Name field of all Reporting Periods which have a child Project Indicator Reporting Period record related to one of the current Project's Project Indicators. Reporting Periods are primarily sorted shown in ascending order by their Reporting Period End Start Date field. If multiple Reporting Periods have the same Reporting Period End Date value, then those Reporting Periods are subsequently sorted in descending order by their Reporting Period Start Date.




b. Optional: A default Results Reporting Period can be selected for the Project which controls the Reporting Period displayed on the filter above when any user first navigates to the Add Results page.

By default, the Reporting Period displayed in the filter will be the first one recorded according to End_Date_c. In order to select a different default Result Reporting Period, the user must:

1. Ensure that the Default_Targets_RP_Id__c field is displayed on the Page Layout. To display the field, go to Object Manager>>Projects>>Page Layout.

2. Navigate to the Reporting Period to display by default and copy the 18-digit Salesforce ID found in the URL of the record.

3. Navigate to the 'Details' page of the Project and paste the 18-digit ID into Default_Results_RP_Id__c field.

c. The Geographic Area picklist displays the Name field of all Geographic Areas which have a child Project Indicator Geographic Area record related to one of the current Project's Project Indicators. Geographic Areas are shown in alphabetical order. If a Geographic Area has a Parent Geographic Area, it is grouped and alphabetized under its Parent Geographic Area.

d. Result data is auto-saved for each input field after the user enters a value and clicks out from the data input cell. If no targets or results had been previously entered for a Project Indicator for that Geographic Area and Reporting Period, the result data is saved into a new Result record. If targets or results had previously been entered for a Project Indicator for that Geographic Area and Reporting Period, the result data is updated in the existing Result record.

e. When a value is selected in either the Reporting Period or the Geographic Area, all Project Indicators which have a child Project Indicator Reporting Period record related to the selected Reporting Period and a child Project Indicator Geographic Area record related to the selected Geographic Area will be displayed on the page.

f. When a value is first entered in the Add Results table, the Result Created Date and Result Last Modified Date custom fields on the corresponding Result record will be populated with the current date/time. When a value is later updated, the Result Last Modified Date custom field will be re-populated with the current date/time.

g. The Add Results page includes input fields into which the users can enter specific targets. The format of these input fields vary based on the Project Indicator's Data Type.

   i. For the three numerical data types (Currency, Number, and Percent):

      - Only numbers, ".", and "-" are accepted as inputs.
      - Up to 16 digits can be entered before the decimal place, and 2 digits can be entered after the decimal place.

   ii. If the Data Type is Currency, all input fields will display the Project Indicator's Reporting Currency value to the right of the input field.

   iii. If the Data Type is Percent, all input fields will display a percentage sign to the right of the input field.

   iv. If the Data Type is Milestone, all input fields will display a picklist input field with 'Yes' and 'No' as potential values.

   v. If the Data Type is Qualitative, a plus icon will display. When clicked, a pop-up will display and accept rich text input.

 **NOTE**: For Project Indicators with Type_of_Result__c = Aggregated or Type_of_Result__c = Calculated, input fields will be displayed on the SetTargets page and output fields will be displayed on the AddResults page. Review the *Calculated and Aggregated Indicators* guide for more information.

h. The number of input fields per indicator is controlled by the Cross-Disaggregation by Sex field and the presence of a child Disaggregated Project Indicator record.

   i. If the Project Indicator's Cross-Disaggregation by Sex checkbox is checked, input fields are displayed in the Male, Female, and Unknown column.

      - If the Data Type is Percent, an additional input field is displayed in the Total column as well.

- If the Data Type is Currency or Numeric, an output field is displayed in the Total column that shows a summation of any values entered in the Female, Male and Unknown input fields.
- If the Data Type is Milestone or Qualitative, no input or output field is displayed in the Total column.

ii. If the Project Indicator has a child Disaggregated Project Indicator record, there will be a row of input fields for each Disaggregation Value related to the Disaggregated Project Indicator's parent Disaggregation Group.

i. Each Project Indicator row has a Comments icon. When clicked, a Comments pop-up window displays to track any notes/guidelines the user wants to track. These are saved to the Comments field on the Result object.

i. The popup also includes a "Results Current As Of" date field that displays the date depending on the user's locale. This field can be used optionally to track the date when the results data was collected and is current as of.

j. Each Project Indicator row has an Information icon In the Project Indicator column. When the user hovers over the icon, the Project Indicator fields in the Set Targets Info Popover field set on the Project Indicator object display as a pop-over.

Review Targets that have been set for the indicator you are reporting results on.

| PROJECT INDICATOR | TOTAL | | MALE | | FEMALE | |
|---|---|---|---|---|---|---|
| | TARGET | RESULT | TARGET | RESULT | TARGET | RESULT |
| Income lost by farmers | 50,841 ARS | 240 ARS | 50,336 ARS | 120 ARS | 238 ARS | 120 ARS |
| Increased awareness about the importance of regular saving | | | | | | |
| Loan repayment rate | | % | | | | |
| Mobile money portfolio | 35,123 INR | 180,000 INR | 10,000 INR | 150,000 INR | 25,000 INR | 30,000 |
| Mobile money regulation passed | | | | | | |
| Number of defaulting borrowers | 4,500 | 3,300 | 2,900 | 2,000 | 1,200 | 1,000 |

**Use search and filters to set targets for specific types of indicators**

a. As text is entered into the Search bar, the Project Indicators displayed on the page are filtered down by those whose Indicator Definition, Data Type, or Thematic Area contain the input text.
b. Clicking the Show More Filters button opens up filters for:
    i. Thematic Area - The Thematic Area filter contains the names of all Thematic Areas which have a Project Thematic Area with the current Project. When values are selected and applied, only Project Indicators with a Project Indicator Thematic Area record whose Thematic Area matches one of the selected values will be rendered in the table.
    ii. Project Objective - The Project Objective filter contains the names of all the Objectives which have a child Project Objective record with the current Project. When values are selected and applied, only Project Indicators with a Project Indicator Objective record whose Objective matches one of the selected values will be rendered in the table.
    iii. Data Type - The Data Type filter contains all picklist values from the Data Type field on the Indicator object. When a value is selected and applied, only Project Indicators with the selected Data Type will be rendered in the table.

c. Searching and filtering work in conjunction. Indicator records will be displayed in the table if they meet criteria for both the search input and the filters.

## Indicator Performance Stoplights

Utilize stoplight icons to calculate results performance compared to targets.

a. Through the *Amp Impact Admin* custom setting, an organization can choose to enable/disable the Indicator Performance Stoplights feature.

b. For an organization to utilize the Indicator Performance Stoplights feature, the fields *Aim, % Threshold Between Red and Yellow, and % Threshold Between Yellow and Green* must be populated on Project Indicators.

   i. To ensure that these fields are available when creating an Indicator, an organization can add them to the Add New Custom Indicator pop-up by adding them to the ADD_NEW_INDICATOR_POPUP field set on the Indicator object.

   ii. To ensure that these fields are available when editing a Project Indicator, an organization can add them to the Edit Project Indicator pop-up by adding them to the EDIT_PROJECT_INDICATOR_POPUP field set on the Project Indicator object.[7]

c. If Aim, % Threshold Between Red and Yellow, and % Threshold Between Yellow and Green all have values on the Project Indicator and there is a target value for the respective result input field, a red, yellow, or green stoplight icon is displayed next to the value in the Total column and the top row (if disaggregation values exist) according to the following calculation:

d. If the Project Indicator's parent Indicator's Aim field value is set to Increase, calculate Result Value / Target Value x 100:

   i. If the calculation is greater than or equal to Threshold Between Yellow and Green, a green stoplight icon is displayed

[7] Field Sets can only be customized in Salesforce Classic.

ii. If the calculated value is less than Threshold Between Yellow and Green but greater than or equal to Threshold Between Red and Yellow, a yellow stoplight icon is displayed.

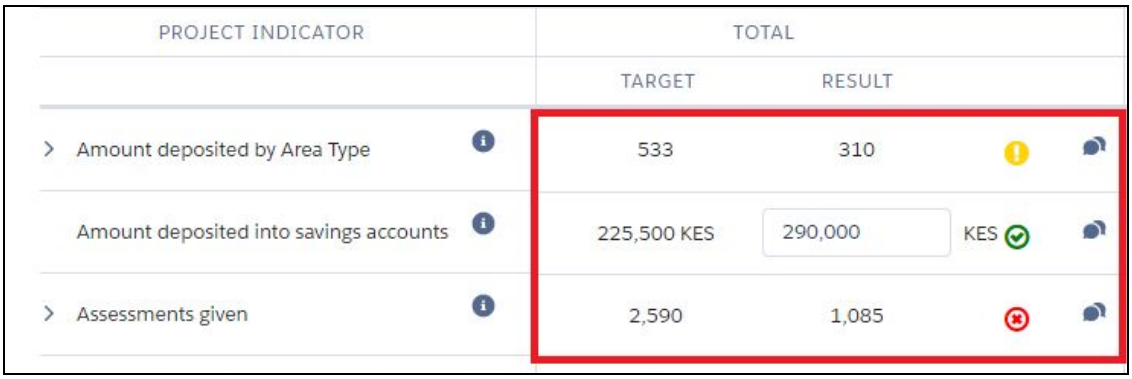
iii. If the calculated value is less than Threshold Between Red and Yellow, a red stoplight icon is displayed.

e. If the Project Indicator's parent Indicator's Aim field value is set to Decrease, calculate (((Target Value - Result Value)/ Target Value)*100)+100

i. If the calculation is greater than or equal to Threshold Between Yellow and Green, a green stoplight icon is displayed.

ii. If the calculated value is less than Threshold Between Yellow and Green but greater than or equal to Threshold Between Red and Yellow, a yellow stoplight icon is displayed.

iii. If the calculated value is less than Threshold Between Red and Yellow, a red stoplight icon is displayed.



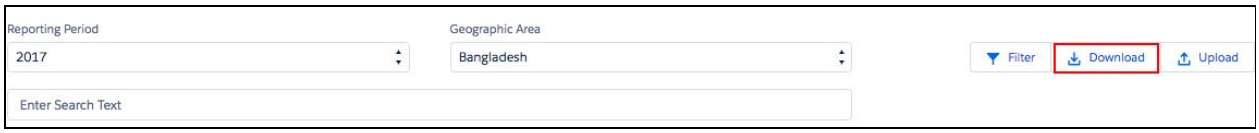
| PROJECT INDICATOR | TOTAL | | |
|---|---|---|---|
| | TARGET | RESULT | |
| Amount deposited by Area Type | 533 | 310 | |
| Amount deposited into savings accounts | 225,500 KES | 290,000 | KES |
| Assessments given | 2,590 | 1,085 | |

## Download Results data to an Excel file

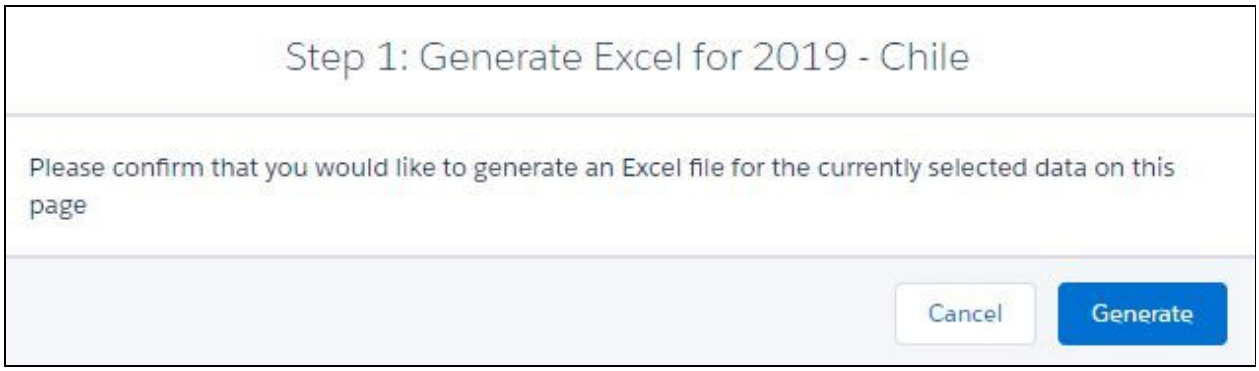
a. Through the *Amp Impact Admin* custom setting, an organization can choose to enable/disable the ability to download only results or both targets and results into an excel file.

b. To download Indicators for a specific project, reporting period and geographic area, the user clicks the "Download" button.

c. User can decide which data is downloaded by applying Filters (using the Filter button and/or the Search text bar). On open, the excel file will contain only data that matches the filters applied at time of download.




d. OnClick of "Download", a pop-up opens. Using custom labels, the user may edit/customize the following in the 'Generate' pop-up: Generate_Excel_Text,Generate_Excel_Button, Generate_Excel_Header.




e. The 'Generate' pop-up will ask the user to confirm generating the excel sheet for the particular reporting period and geographic area selected. In this pop-up, the user can either click 'Generate' or 'Cancel'

i. If there is no project indicator linked to a geographic area and reporting period, then selecting 'Generate' will prompt an error message.

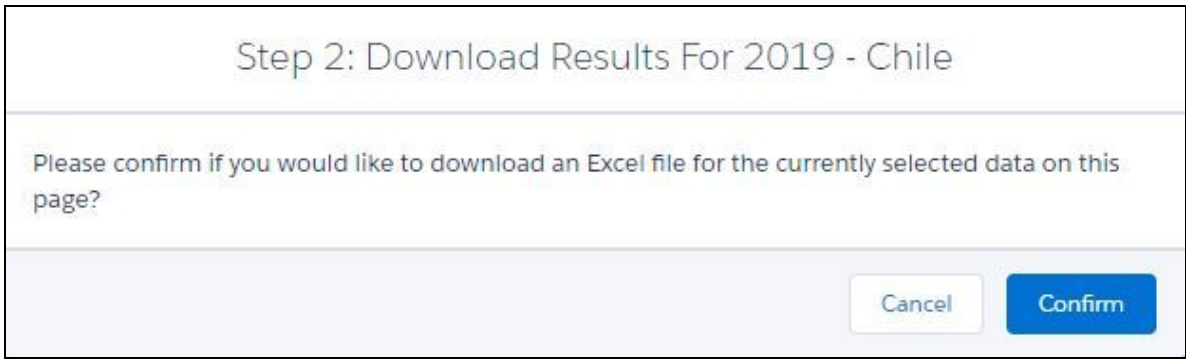
ii. Selecting 'Cancel' will exit from the 'Generate' pop-up. The page will remain on the AddResults page.

f. If there is at least one project indicator linked to a geographic area and reporting period, then selecting 'Generate' will prompt a 'Confirm' pop-up. Using custom labels, the user may edit the following in the 'Confirm' pop-up: Download_Targets_Header.

g. The 'Confirm' pop-up will ask the user to confirm the download of the excel sheet for the particular reporting period and geographic area selected. In this pop-up, users can either click 'Confirm' or 'Cancel'

i. Selecting 'Cancel' will close the pop-up and the user will remain on the AddResults page.

ii. Selecting 'Confirm' will prompt the download of the excel file onto the AddResults page.




h. Once 'Confirm' has been selected, the file will download. OnOpen of the file, 2 tabs will be shown

i. The first tab will contain a set of instructions on how to use the downloaded file and on how it may be edited to remain compatible with the system for a re-upload

ii. The second tab will contain the data and information from the SetTargets page. This tab will also display, below the header, the date and time of download, and the name of the user who downloaded the file.

i. The file will also be stored in the ContentVersion object. If a user downloads an excel file multiple times for the same geographic area and reporting period, the File record will update with the latest version. The user may access all of the versions that have been downloaded by selecting 'View previous versions.'

## Upload Results data from an Excel file

a. Through the *Add Results* custom setting (refer to *Installation* guide for access and set-up details), an organization can turn enable/disable the ability for users to access the upload

excel button.


b. On the AddResults page, the 'Download' button will appear in the top right corner of the screen. Selecting that button will prompt the user to go through the steps to download the results for a given reporting period and geographic area. See the section above on downloading results as an excel file.

c. OnOpen of the newly downloaded excel sheet, there will be 2 tabs
   i. The first tab will be labeled as, "Instructions' - this tab will outline how to enter data in a compatible format to upload the document onto the AddResults page
   ii. The second tab will change dynamically to reflect the reporting period and geographic area, and will formatted as such - '[Reporting Period label] - [Geographic Area name]'

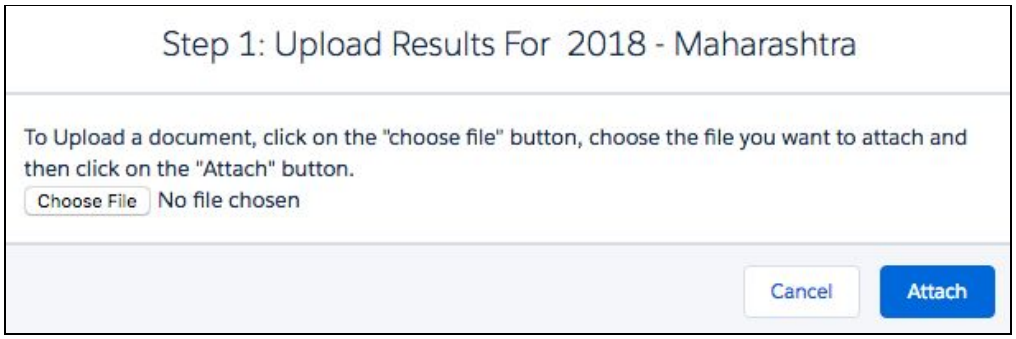
d. Data may be added to the excel sheet
   i. The following portions of the excel sheet may be edited:
      1. The number of tabs
      2. The values in the input cells which are indicated by the blue background
   ii. The following portions of the excel sheet may **not** be edited in order to comply with the compatibility of re-uploading
      1. The header text on the tab with the downloaded data
      2. The names of the column headers in the downloaded tab
      3. The name of the downloaded tab

4. The existence of one tab with the Reporting Period and Geographic Area as the label

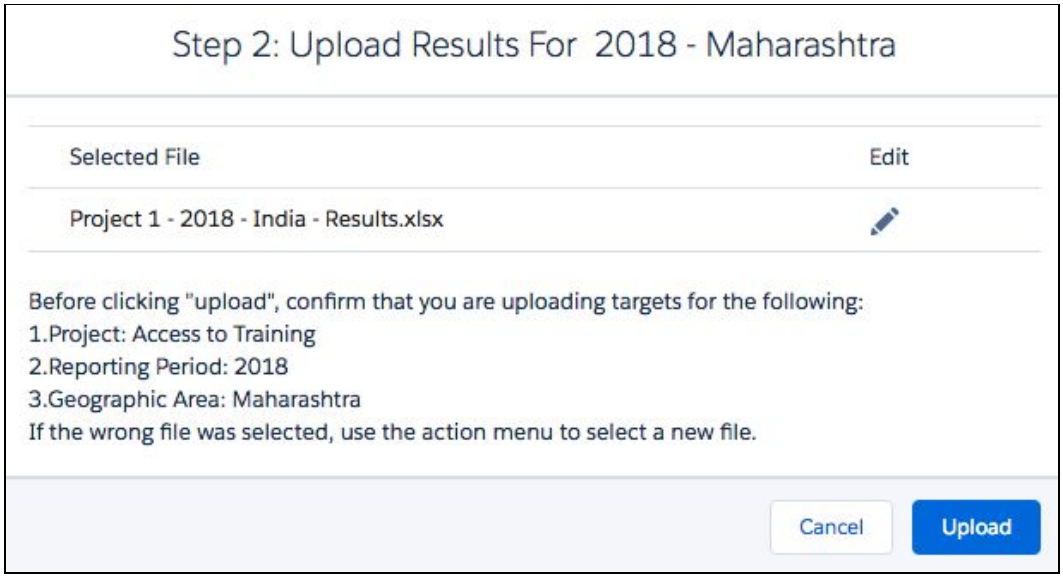
e. Once data has been entered into the excel sheet, the user must navigate to the AddResults page and click the *Upload* button in the top right corner of the screen


f. *Step 1* - Selecting the *Upload* button will prompt a popup to allow the user to attach the file to be uploaded for that particular geographic area and reporting period

   i. The user may click on "Cancel" at any time and return to the AddResults page, with no records updated.




g. *Step 2* - When choosing a file, ensure that the file type is 'xlsx.'. Clicking "Attach" will prompt the next popup.



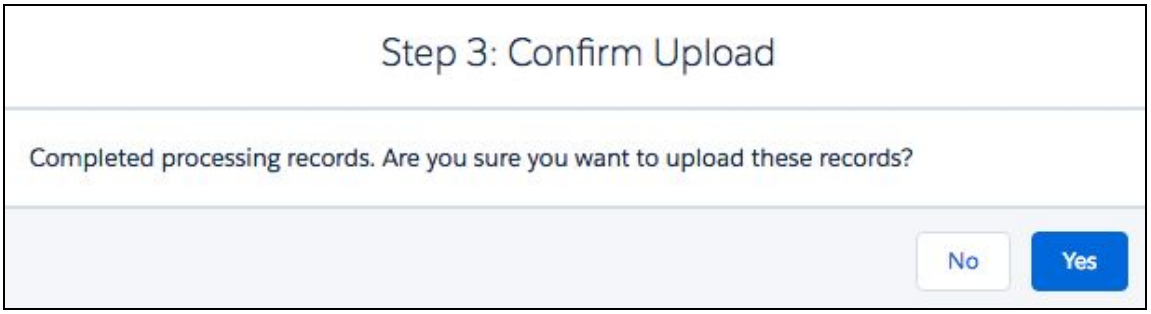

h. Once the upload popup appears, click on the "Upload" button. The popup will confirm the **reporting period, geographic area,** and **project name**.

i. At this step, an error message will appear onclick of *Upload* if the uploaded document is not in the .xlsx format, in which case, the user must revisit the document to be uploaded and edit it to make it compatible.

j. *Step 3* - Once the upload is complete, a "Confirm Upload" popup will appear. The popup will ask the user to confirm that the records uploaded should update the results for the chosen reporting period and geographic area

   i. Selecting "No" will cancel out of the popup, with no records updated

   ii. Selecting "Yes" will confirm the upload and the records will update




k. *Step 4* - Once the user has selected "Yes," there will be a popup that reads "Operation Complete," with the number of successfully updated records and the number of errors that occured


i. On this popup, there are several buttons:

1. "View Successes" - selecting this shows the user the successful uploads. Clicking *View Successes* button will cause a download of a file with all of the indicators that successfully uploaded. This file will occur on the STAR pages and a record on ContentVersion will also be created.

    a. If there were no successes, the *View Successes* button will not display in Step 4

2. "View Errors" - selecting this shows the user an error log of records that could not be successfully uploaded and the associated errors . Clicking on *View Errors* button will cause a download of a file with all of the indicators that unsuccessfully uploaded. This file will occur on the STAR pages and a record on ContentVersion will also be created.

a. If there were no errors, then the *View Errors* button will not display in Step 4

l. The user can download the success/error logs and then close the pop-up. This will automatically refresh the AddResults page and display the newly updated records.

**Submit Results for review**

a. Through the *Amp Impact Admin* custom setting, an organization can choose to enable/disable the Submit Results feature.

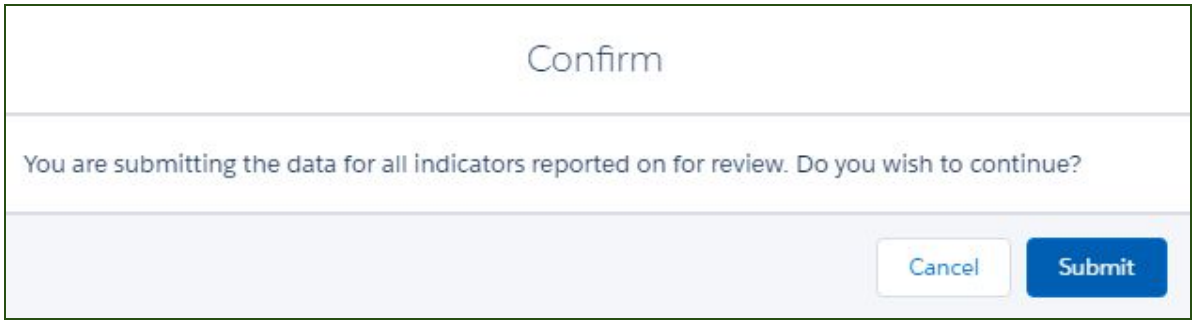
b. Once data entry is complete for the results for a given Reporting Period, the user clicks the *Submit* button. The text in the pop-up window that displays can be edited by users in the Confirm_Submit_Review custom label.


c. Users are able to submit results for multiple Reporting_Period__c records, if applicable. For example, a user can may need to submit results for Chile for quarter 2 and the semi-annual report. They can go to the relevant reporting periods, enter data and then submit.

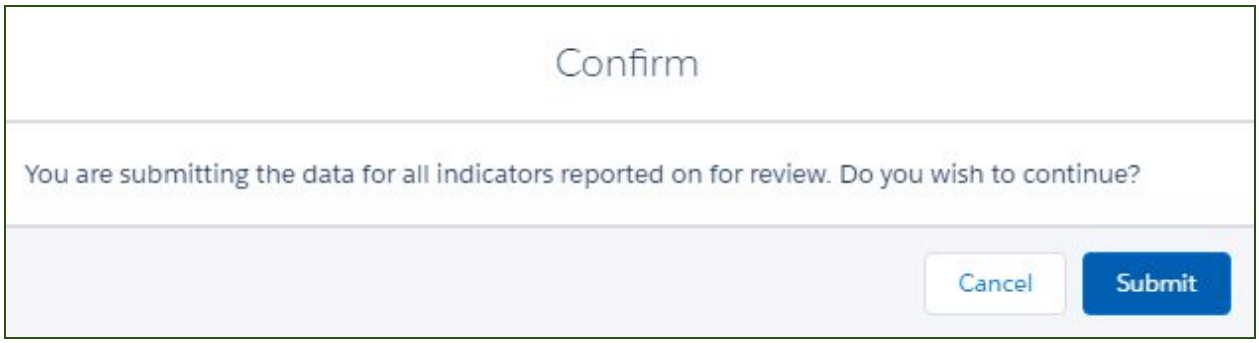
d. Customize a review process for adding results to garner approval from relevant team-members.

e. Users have the option to create workflows that trigger certain actions on the click of the Submit button. For example, clicking on the Submit button can set a specific Status and generate an email notification. The Result_Status__c field can also be configured through a workflow to edit the Results_Locked__c field which can lock the result input fields for that Reporting Period and Geographic Area un-editable so that users can no longer make any changes to the data

entered.




f. On the AddResults page, the results display as output fields when
   i. The field Results_Locked__c = TRUE for a reporting period, OR
   ii. A user submits the page for review.



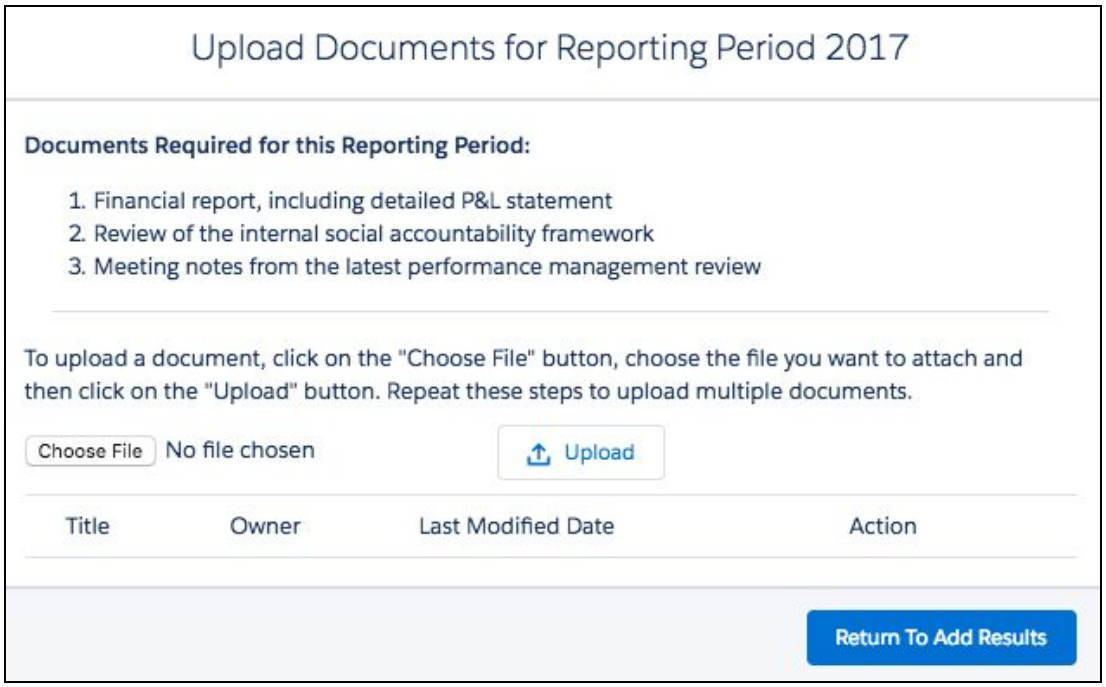

g. When the results appear as output fields, the user cannot edit the targets entered. Project Indicators with Data Type = Qualitative will display a *View* icon.
h. Once the user clicks the *Submit* button, the *Upload* button is greyed out to prevent any additional results from being uploaded.

## Upload documents

a. Through the *Amp Impact Admin* custom setting, an organization can choose to enable/disable the Upload Documents feature. This feature allows users to upload documents supporting the results data they have entered for the specific reporting period.

b. When the *Attach* button is clicked, the Upload Document pop-up window displays for the currently selected Reporting Period. The window displays:

- The rich text data entered in the Documents_Required_for_RP__c field on Reporting_Period__c object. This allows organizations to specify the list of documents they want or recommend users to upload to support the data they have reported.
- Interface to choose a file to upload and upload button.
- A table listing the documents uploaded, with owner and date details. These documents can be edited/updated version can be uploaded using the Edit icon.



## Performance Graphs

Overview: The Performance Graphs Visualforce page allows users to visualize the targets and results that have been entered for Project Indicator records over time. The page allows users to select up to nine numerical indicators to visualize data for.

### Select indicators to visualize data

a. In the Selected picklist, all Project Indicators with a Data Type of Number, Currency, or Percent are displayed in alphabetical order.

 **NOTE**: Project Indicators with a Data Type = Percent are displayed on the Performance Graphs page if the Project Indicator (1) has no level of disaggregation and corresponds to only one Geographic Area OR (2) is Cross-Disaggregated by sex and corresponds to only one Geographic Area. If the above criteria are not met, then the project indicators will not appear as an option in the dropdown of project indicators to choose from on the Performance Graphs page.

b. Check the checkbox next to a Project Indicator to display a chart for that indicator's data. A maximum of nine charts can be displayed. When the page loads, the first nine records are checked by default. Selections are applied when the Apply Selection button is clicked.

c. If a selected Project Indicator has no Result values, the chart will not display.

 **NOTE**: Each graph on the PerformanceGraph page displays values in the Total_Target__c and Total_Result__c fields on the Results object.

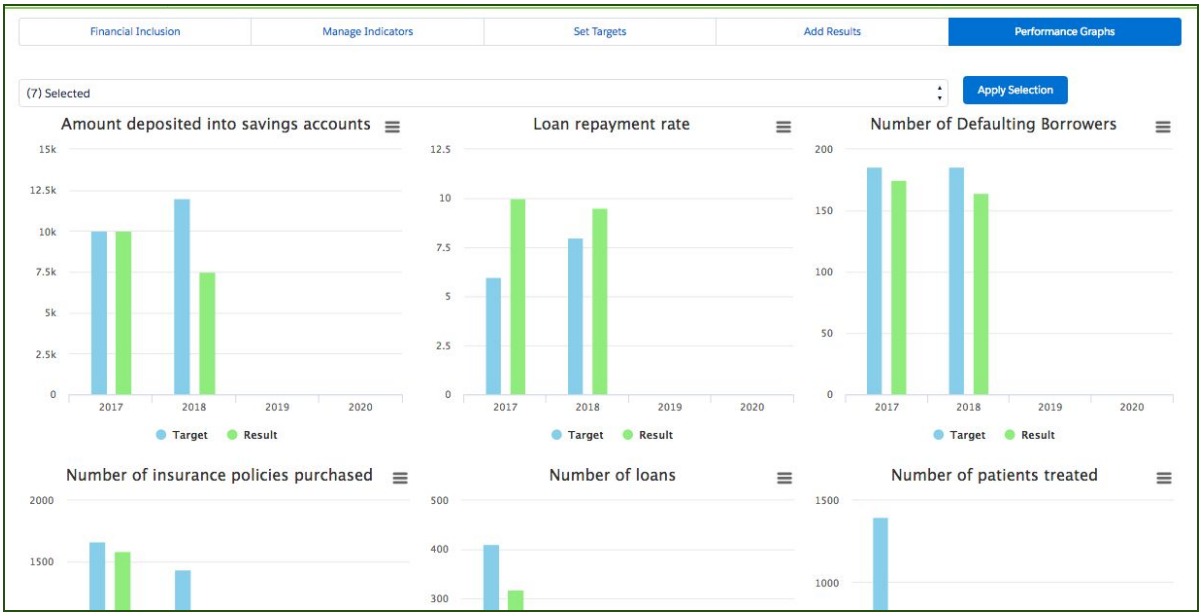
## Visualize targets and results for selected indicators

a. In each chart, the x-axis displays all the Reporting Period Name values from Project Indicator Reporting Period records related to the Project Indicator's Result records. The x-axis is sorted by:

   1. Reporting Period End Date in ascending order
   2. Where Reporting Periods have the same End Date, then subsequently sort by Reporting Period Start Date in descending order

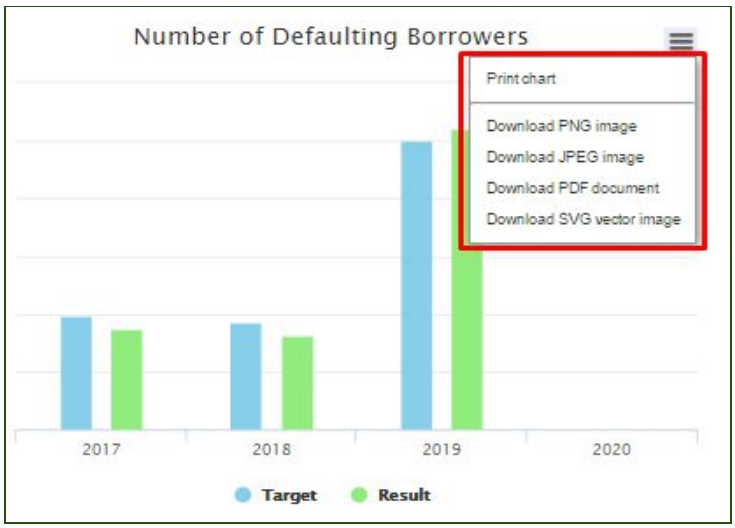
b. The y-axis displays the Target Value field in one series and the Result Value in another series. If there are multiple Result records for the same reporting period (i.e. in the case of an indicator with multiple disaggregation values), the Target Values and Result Values are summed up across all the records.

c. In each chart's legend, the Target and Result labels can be clicked to show and hide the Targets and Results series values.



## Download or print chart

The icon in the top-right corner of each chart can be clicked to display different file formats to download or print the chart.



## Financials

The Financials Visualforce page enables users to (a) create, schedule, and track payments for their program/grants/investments and (b) access their Project Budgets.

The page displays a summary that gives a brief overview of the Project's time span and how much of its funding amount has been paid to date. In order to enable a project summary on the ManageDisbursements Page, navigate to Custom Settings → Select "Manage" next to "Amp Impact Setup" → Check the box that reads "Project Summary on Manage Disbursements?"

The fields in this summary section are controlled through the PROJECT_SUMMARY field set on the Project__c object.

The page features two tables, one with Disbursement records and one with Budget records. The Disbursement records of a Project displays each Disbursement's Scheduled Date, Amount, Percent (of the Project's Funding Amount), and Status.

Beneath the Disbursement table is a related list that displays all Budget records for the project. Clicking into a Budget record displays a chart of the actual vs planned expenditure and detailed line-item expenditure.

 **NOTE**: In Salesforce Classic, this page is known as "ManageDisbursements," and displays the summary section only. The Budget Related List is not shown. In Salesforce Lightning, this page is known as "Financials," and the Budget Related List with Budget records are shown. The images below display the page as seen on Salesforce Lightning.

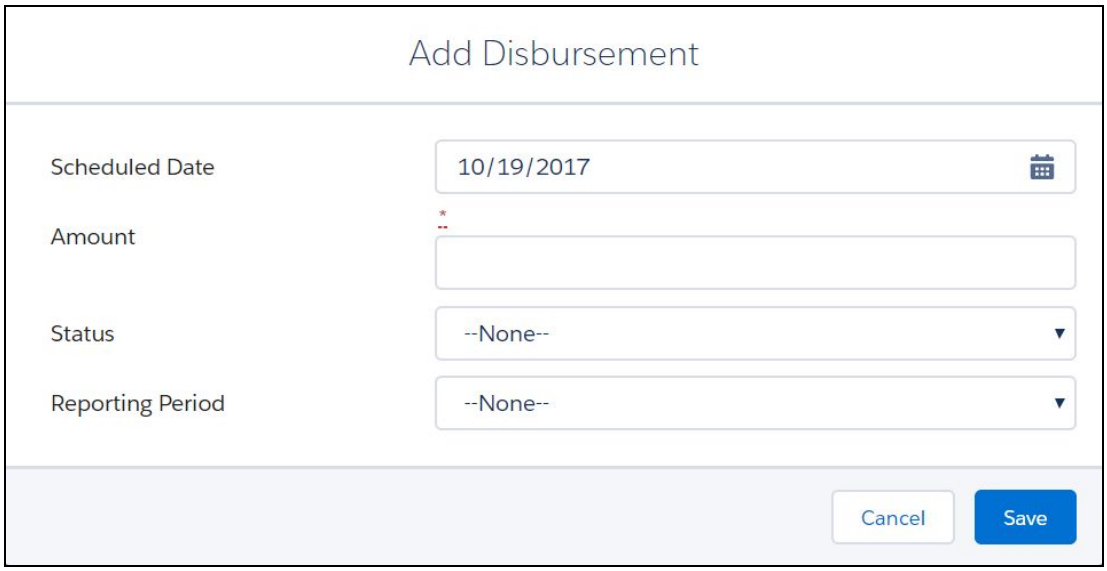
<u>To set up and use this feature: refer to the 'Customize Field Sets' section of the Installation Guide</u>

### Create and schedule Disbursement records

a. From the Financial page, a user can create new Disbursement records by clicking the "Add New" button at the bottom left of the page. A pop-up will appear for the user to fill

out - the only required field is Amount. When a user clicks “Save”, the Disbursement record is created, and its values appear in the table.

 **NOTE**: The fields that appear in the ‘Add New Disbursement’ popup can be edited through the ADD_EDIT_POPUP Field Set on the Disbursement object.




b. The % column in the table displays a formula field that calculates ( Disbursement Amount / Project Funding Amount ) * 100. The calculated amount is then rounded to the second decimal place to be displayed in the column.

c. The Disbursements in the table are ordered by ascending Scheduled Date. The table automatically calculates the total amount of a project’s disbursements and the total percentage of the funding amount that has been scheduled for disbursement at the bottom of the table.

| PROJECT START DATE | PROJECT END DATE | FUNDING AMOUNT | PAID AMOUNT |
|---|---|---|---|
| | | $10,000.00 | $1,400.00 |

| SCHEDULED DATE | AMOUNT | % OF FUNDING AMOUNT | STATUS | ACTION |
|---|---|---|---|---|
| 6/1/2018 | 600 USD | 6.0 % | Scheduled | |
| 7/2/2018 | 30 USD | 0.3 % | Pending | |
| 8/1/2018 | 1,000 USD | 10.0 % | Approved | |
| 9/1/2018 | 1,400 USD | 14.0 % | Paid | |
| TOTAL | 3,030 USD | 30.3 % | | |

## Track progress of Disbursements

a. Each Disbursement record has an Edit and Delete icon next to it. To update the status of a Disbursement - for example, to change the status from "Pending" to "Approved" - a user can click the Edit icon and update the value of the Status picklist field.

| PROJECT START DATE | PROJECT END DATE | FUNDING AMOUNT | PAID AMOUNT |
|---|---|---|---|
| 5/1/2018 | 5/1/2019 | $10,000.00 | $1,400.00 |

| SCHEDULED DATE | AMOUNT | % OF FUNDING AMOUNT | STATUS | ACTION |
|---|---|---|---|---|
| 6/1/2018 | 600 USD | 6.0 % | Scheduled | |
| 7/2/2018 | 30 USD | 0.3 % | Pending | |
| 8/1/2018 | 1,000 USD | 10.0 % | Approved | |
| 9/1/2018 | 1,400 USD | 14.0 % | Paid | |
| TOTAL | 3,030 USD | 30.3 % | | |

b. When a Disbursement Status is updated to "Paid", the Amount value of the Disbursement is rolled up to the Paid Amount field in the Project Summary above the table.

c. If a Disbursement Status is updated to "Paid," that Disbursement cannot be deleted unless the status is changed from "Paid," to one of the other options (Scheduled, Pending, or Approved).

## Track IATI Reporting Data

The International Aid Transparency Initiative (IATI) is an initiative that works towards providing transparency regarding aid, development, and humanitarian resources. Organizations use the IATI Standard to collect and report on data for their internal reporting and for external stakeholders.

Objects and Fields used for IATI reporting are built into Amp Impact. The following custom objects function solely to create data that is compatible with IATI:

1. Organization_Role__c
2. IATI_Policy__c
3. Project_IATI_Policy__c
4. IATI_Sector__c
5. Project_IATI_Sector__c

The following objects have fields that may be added by the user to the object's field set or page layout to account for IATI compatibility:

1. Account__c
2. Project__c
3. Project_Indicator__c
4. Geographical_Area__c
5. Project_Geographic_Area__c
6. Disbursement__c
7. Financial__c
8. Budget__c

In order to add IATI related fields to any of the above objects' page layout, go to Setup → Object Manager → Select the object of choice → Page Layout

In order to add IATI related fields to any of above objects' Field Set, go to Setup → Object Manager → Select the object of choice → Field Set

For more on the different fields that are compatible with IATI Publishing, please refer to the **Field Map**.

## Reports and Data Visualization

In addition to the Performance Graphs page, which offers quick insight into a project's performance per indicator, Amp Impact includes the following sample reports to get users started with data analytics and visualizations. All of these reports are saved and accessible though the "Amp Reports" folder in the Reports tab.

1. **Disaggregated Targets vs Results**

   This is a sample report with summed Targets and Results reported per project indicator, sliced by disaggregation groups (if applicable). Filters can be added to track only indicators within a single project, reporting period, and/or geographic area.

2. **Objective with Project Indicators**

   This is a sample report filtered by a single Project and a single Objective to display related Project Indicators and the Targets and Results reported to date. This report can be cloned with adjusted filters for each Objective, so that an organization can track their progress towards any Objective in a Project.

3. **Targets vs Results (Num + Currency)**

   This is a sample report to display total Target and Result values reported for numeric & currency project indicators across projects, reporting periods, and geographic areas. Filters can be added to track only numeric and currency indicators within a single project, reporting period, and/or geographic area. This report is included as a component in the Home page for Amp Impact in Lightning Experience.

4. **Targets vs Results (Percent)**

   This is a sample report to display average Target and Result values for percent project indicators across projects, reporting periods, and geographic areas. Filters can be added to track only percent indicators within a single project, reporting period, and/or geographic area. This report is included as a component in the Home page for Amp Impact in Lightning Experience.

5. **Deactivated Indicators Historic Data**

   This is a sample report to display the targets and results data from all project indicators that have been deactivated. Since these project indicators are no longer displayed on any of Amp Impact's Visualforce pages, this report provides an easy way for users to access historic data that may have been collected when these project indicators were active.

6. **Results v Targets by Area over Time**

   This is a sample report to track an indicators' progress by Geographic Area and by Reporting Period for all Projects. This report is displayed as a report chart on the Indicator Lightning Record Page to visualize indicator-level progress across geographies and over time.

7. **Results v Targets by Project over Time**

   This is a sample report to track an indicators' progress by Project and by Reporting Period. This report is displayed as a report chart on the Indicator Lightning Record Page to visualize indicator-level progress across projects and over time.