

# Submissions

April 2020

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## Overview

The Submissions feature in Amp Impact allows users to create one or more Templates with Sections and Questions from which a Submission can be created and assigned to internal or external users. These users can then provide Responses to the Questions in the Submission and submit these responses for Review.

Submissions can be used for various purposes, some of which include:

- Create an Assessment with scored Sections and Questions for evaluation purposes
- Create a Narrative Report with responses to qualitative Questions

## Submission Template Guide

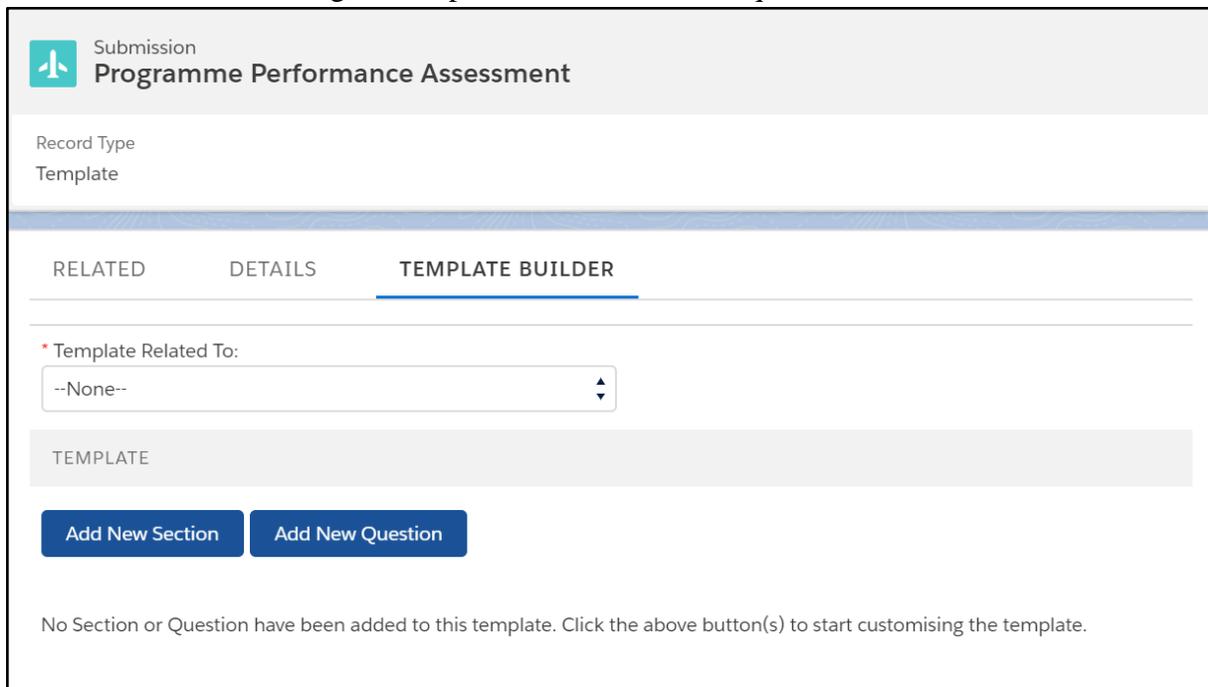
Templates are the master version of a submission, from which submissions can be copied and assigned for completion. They are created and customized through the Submission Template Record Page.

### Create and Customize a Submission Template

To start using the Submissions feature, you will first create a Submission template. From this template, users can create a Submission record and assign it to other users to fill out.

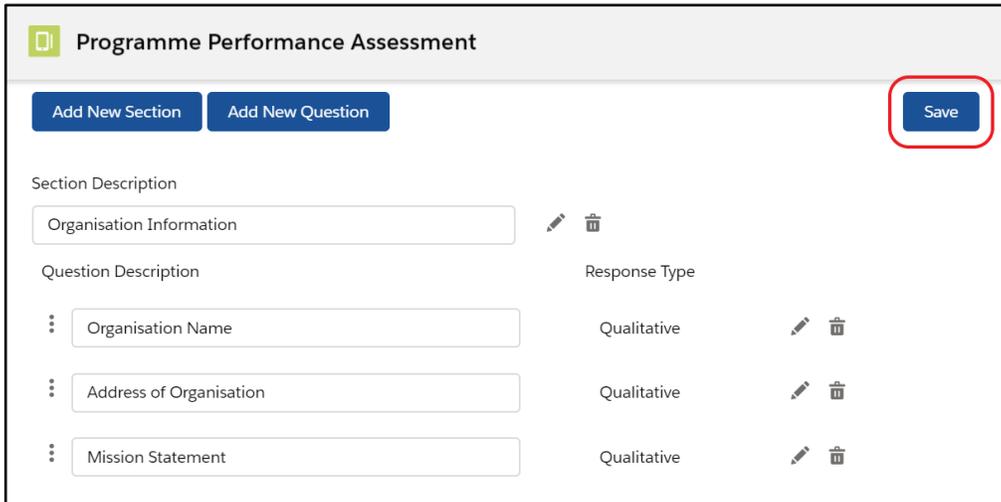
1. Open the Submissions tab.
2. Click *New* to create a new Submission record.
3. When prompted for a Record Type, select Template.
4. Name the Template using the Description field. Set Guidelines if needed to provide instructions / helpful guidelines.

Once the Submission template record is created, navigate to the *Template Builder* tab on the record to start customizing the template with sections and questions.



The screenshot shows the 'Submission Template Builder' interface. At the top, it displays 'Submission Programme Performance Assessment'. Below this, the 'Record Type' is set to 'Template'. The interface has three tabs: 'RELATED', 'DETAILS', and 'TEMPLATE BUILDER', with 'TEMPLATE BUILDER' being the active tab. A dropdown menu labeled '\* Template Related To:' is currently set to '--None--'. Below the dropdown is a section titled 'TEMPLATE' which contains two buttons: 'Add New Section' and 'Add New Question'. At the bottom of the interface, a message states: 'No Section or Question have been added to this template. Click the above button(s) to start customising the template.'

ⓘ **Important:** After making customizations to the template (i.e. adding, editing, and removing either sections or questions), the **Save** button at the top of the screen must be clicked to finalize those changes, before navigating away from the record or assigning the template to be filled out.



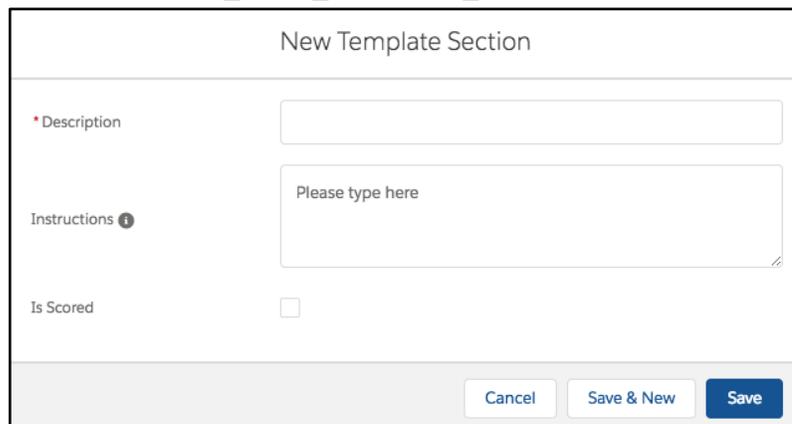
The screenshot shows a form titled "Programme Performance Assessment". At the top, there are two buttons: "Add New Section" and "Add New Question". To the right of these is a "Save" button, which is circled in red. Below the buttons, there is a "Section Description" field containing "Organisation Information". Underneath, there is a "Question Description" section with three rows. Each row has a "Question Description" field and a "Response Type" field. The first row has "Organisation Name" and "Qualitative". The second row has "Address of Organisation" and "Qualitative". The third row has "Mission Statement" and "Qualitative". Each row also has edit and delete icons.

### Add Sections to the Template

ⓘ The addition of Sections to a Template is required if users will be viewing *Radar Charts* which display Scores. For unscored Submissions, creating a Section is not required.

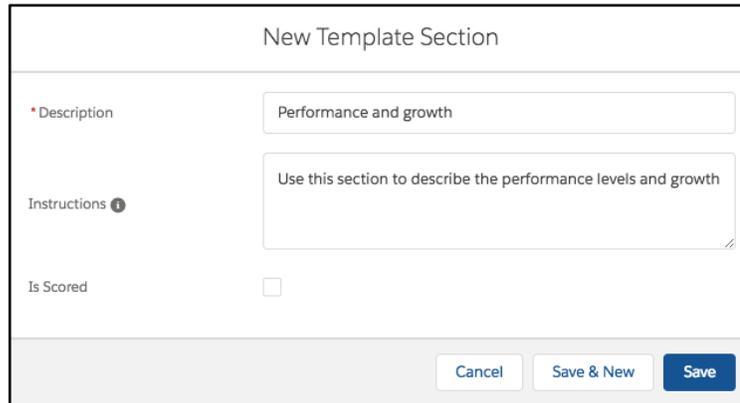
Use the Template Builder to create a new Section, which can be used to categorize or order questions.

1. Click the *Add New Section* button. A pop-up will appear - the fields in the pop-up can be added/removed from the ADD\_EDIT\_SECTION\_POPUP field set in the Section object.



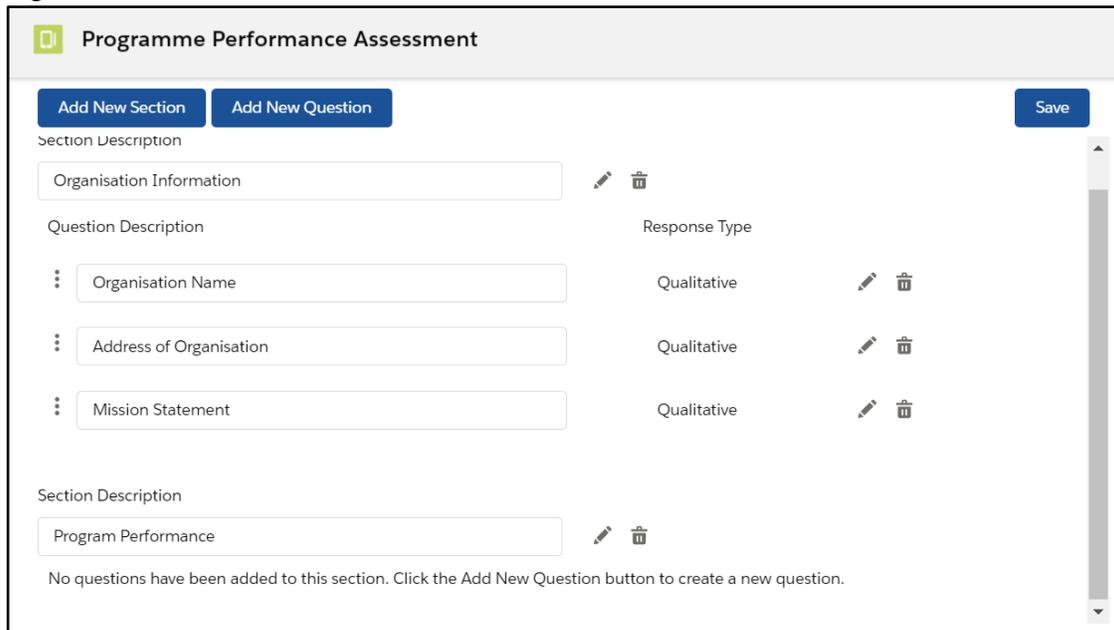
The screenshot shows a pop-up form titled "New Template Section". It has three main fields: "Description" (with a red asterisk), "Instructions" (with an information icon), and "Is Scored" (a checkbox). At the bottom, there are three buttons: "Cancel", "Save & New", and "Save".

2. In the pop-up, name the Section using the *Description* field.



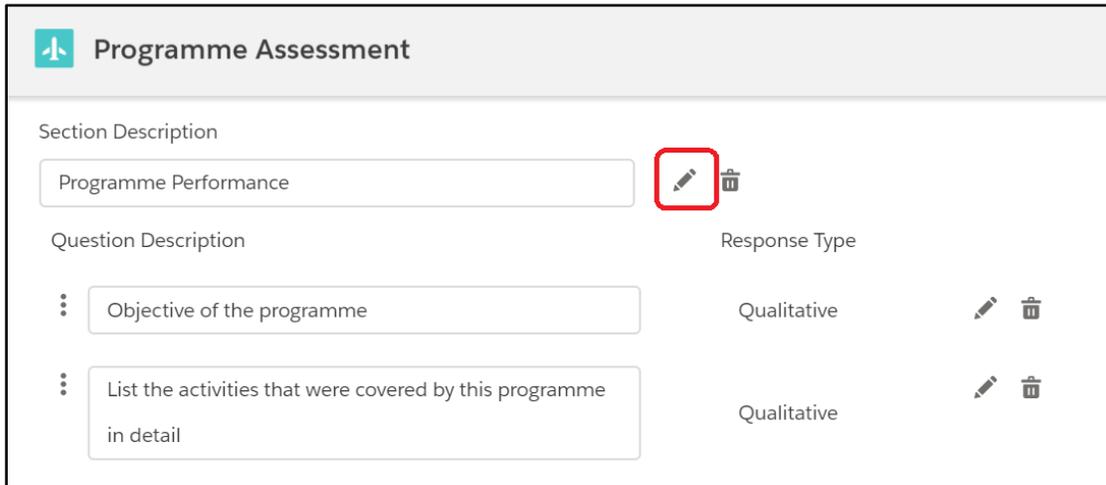
3. (optional) Add instructions or guidelines for the Section in the *Instructions* field.
4. Select whether or not the Section will be scored during the review process with the *Is Scored* field.
5. Click Save or Save & New.

Once a Section has been created and saved, it will appear as a row in the Template Builder. If any Sections previously existed, then the newly created Section will appear below all of the existing Sections.



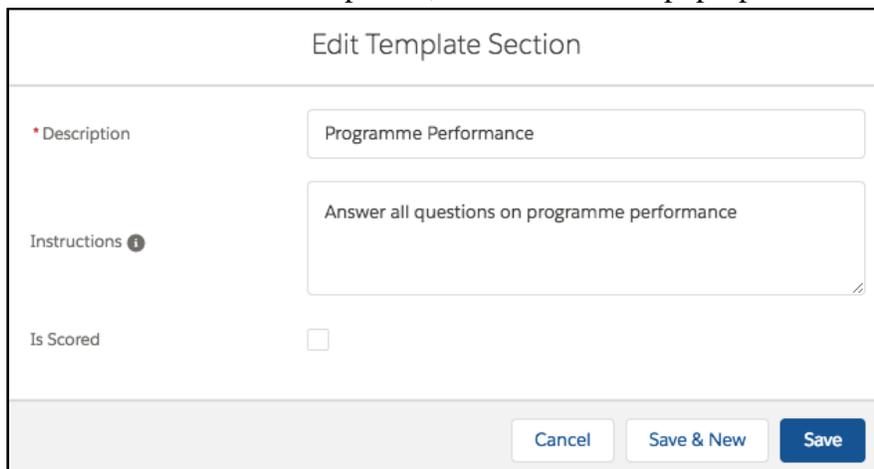
### Edit Sections in a Template

After a Section has been created or added to the Template, changes can be made to the Section by clicking the *Edit* icon next to the Section’s description.



Section Description	Response Type
Programme Performance	
Objective of the programme	Qualitative
List the activities that were covered by this programme in detail	Qualitative

A pop-up will appear for the user to modify the Section information. The fields in the pop-up can be added/removed from the ADD\_EDIT\_SECTION\_POPUP field set in the Section object. Once the Section information has been updated, click Save in the pop-up.



- If the *Description* field was changed, the updated text will appear in the Section row on the Template Builder.
- If the *Order* field was changed, the Section will appear in the row corresponding to the new Order value, and all subsequent Sections will be shifted down a row.

Sections can also be rearranged in the template using the drag and drop interface in the Template Builder.

1. Click and hold the text box containing the Section Description.
2. While holding, move the Section row to the desired placement in the Template.
3. Release the Section in the desired placement.



- a. The Section will appear in the new placement, and its `ampi__Order__c` value will automatically update.
- b. Any subsequent Sections in the Template will shift down a row, and their `ampi__Order__c` values will also automatically update.
- c. Any Questions in the dropped Section will continue to be displayed under that Section in its new placement.

① When a Section is edited, any existing Submissions that had been created from the Template before the edits will not be affected by the change. Any new Submissions created from the Template after a Section was edited, will reflect the change.

### Remove Sections from a Template

① When a Section is removed, any Questions that have been assigned to that Section will remain in the Template but will not display without a newly assigned Section.

If a Section needs to be removed, click the remove icon next to the Section's description.

A screenshot of the Amp Impact interface. At the top, there is a header with a teal icon and the text "Programme Assessment". Below this, there is a "Section Description" field containing the text "Programme Performance". To the right of this field is a red square icon with a white trash can symbol, which is highlighted with a red box. Below the section description, there are two "Question Description" fields. The first contains "Objective of the programme" and the second contains "List the activities that were covered by this programme in detail". To the right of these questions, there is a "Response Type" column with two entries, both labeled "Qualitative". Each "Qualitative" entry has a small teal edit icon and a red trash can icon to its right.

A pop-up will appear requesting the user to confirm the removal. Once the removal is confirmed, then the Section no longer appears in the Template Builder.

Delete

---

Are you sure you want to remove this Section from the Template? If you click on the "Delete", this Section and any related Questions will no longer be displayed in the Template or in any new Submissions created from this Template.

Cancel Delete

① When a Section is removed, it is deactivated (i.e. the Active field on Section is set to FALSE), not deleted. Any existing Submissions that had been created from the Template before the Section's removal will not be affected by the change. Any new Submissions created from the Template after the Section's removal will reflect the change.

### Add Questions to the Template

Use the Template Builder to add Questions to a template.

1. Click the Add New Question button. A pop-up will appear.

New Template Question

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Section --None--

\* Description

Required?

Include Comments?

\* Response Type --None--

Picklist Values  ⓘ

Cancel Save & New Save



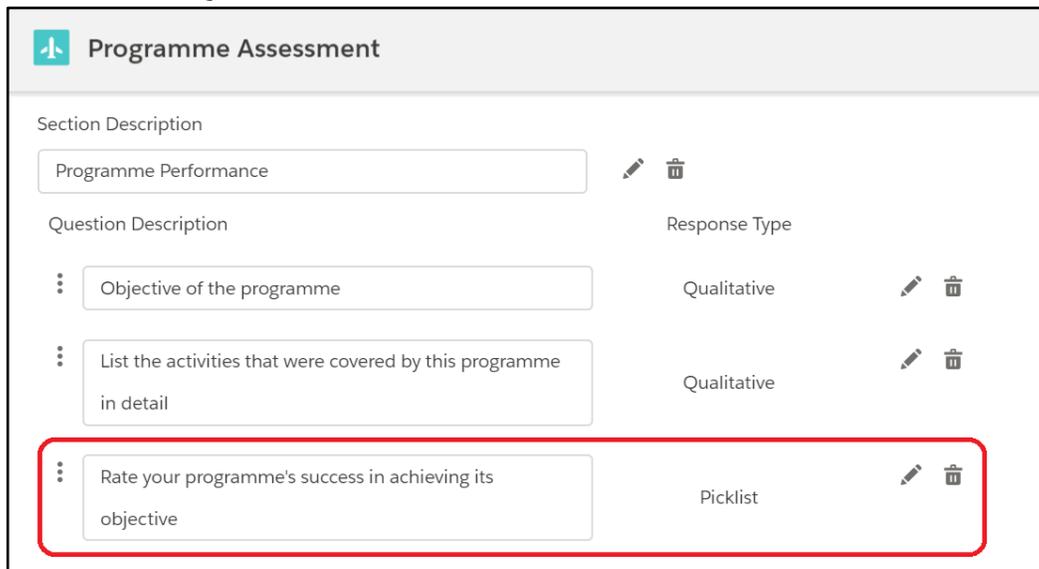
2. In the pop-up, use the *Description* field to define the Question. Note that this field has a character limit of 255. Any values that exceed this will prevent the Question from being saved successfully.
3. Select how users will respond to the Question in the *Response Type* field:
  - a. Qualitative - users will answer by typing into a rich text area.
  - b. Picklist - users will answer by selecting from a picklist of pre-defined values. If this is selected, set the pre-defined values by entering them as comma-separated values in the *Picklist Values* field. In the picklist, the values will appear in the order that they are entered in the *Picklist Values* field.
  - c. Multi-select picklist - users will answer by selecting *multiple* values from a picklist of pre-defined values. If this is selected, set the pre-defined values by entering them as comma-separated values in the *Picklist Values* field. In the picklist, the values will appear in the order that they are entered in the *Picklist Values* field.
  - d. Number - users will answer by typing a number into a text box.
4. Determine whether users are required to respond to this question using the *Required?* field.
5. Determine whether users can add comments to their response with the *Include Comments?* field.
  - a. This checkbox cannot be selected if Response Type is set as “Qualitative”.
6. Select whether or not the Question will be scored during the review process with the *Is Scored* field.
7. (Optional) Select which Section the Question should appear under in the *Section* field.
  - a. If no Section is selected, then the Question will appear by default at the top of the template, above all the sections and underneath any other unassigned questions.
  - b. If no Section is selected, then a hidden default Section is automatically created as parent to the new Question. If the default Section already exists, then when a Question is created without a selected Section, the new Question is automatically assigned to the existing default Section.
8. (Optional) Determine the word limit for Qualitative reporting questions using the Text Response Character Limit field on *Add New Question* popup.
  - a. Enter a number value in the Text Response Character Limit field to ensure that the respondent honours the user-defined character limit set for a Qualitative question.
    - i. For example, if a system administrator want to allow users to enter responses with a limit of 400 characters, the system admin will enter ‘400’ in the Text Response Character Limit field

- ii. If no limit is set by the system administrator , the system defined character limit for Qualitative responses will default to the maximum limit of 32,768 characters. If a limit is set, then the user-defined character limit in the Text Response Character Limit field must be less than 32,768 characters.

① When defining the Text Response Character Limit, it is recommended to leave a 50 character buffer for HTML formatting to accommodate for qualitative responses that contain rich text.

9. Click Save or Save & New.

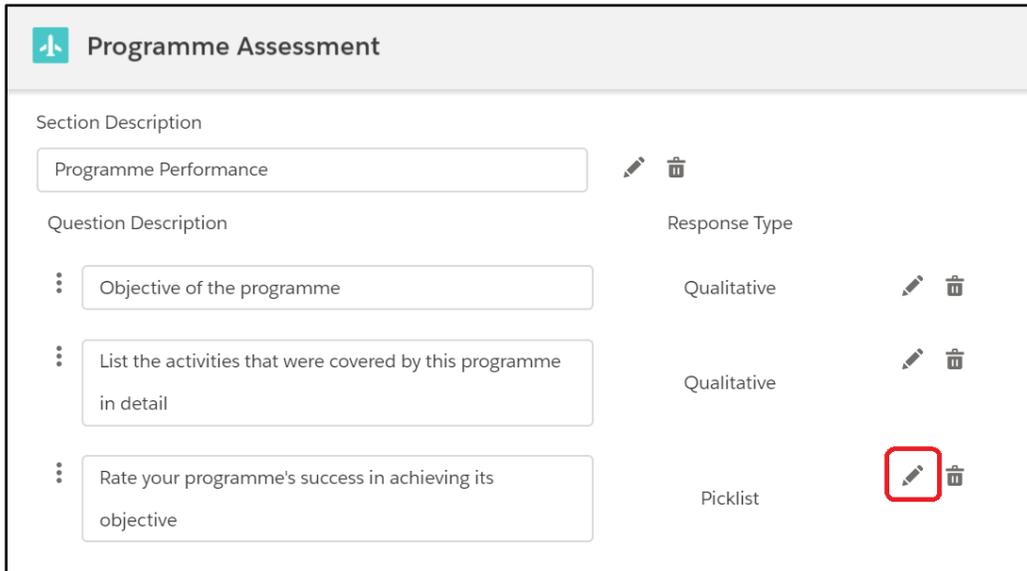
Once a question is created and saved, it will appear as a row in the Template Builder, either below the related Section if one has been assigned or at the top of the builder if no Section has been assigned. If any Questions previously existed, then the newly created Section will appear below all of the older Questions.



Programme Assessment		
Section Description	Programme Performance	
Question Description	Response Type	
Objective of the programme	Qualitative	
List the activities that were covered by this programme in detail	Qualitative	
Rate your programme's success in achieving its objective	Picklist	

### Edit Questions in a Template

After a Question has been created or added to the Template, changes can be made to the Question by clicking the edit icon next to the Question's description.



**Programme Assessment**

Section Description

Programme Performance

Question Description

Objective of the programme

List the activities that were covered by this programme in detail

Rate your programme's success in achieving its objective

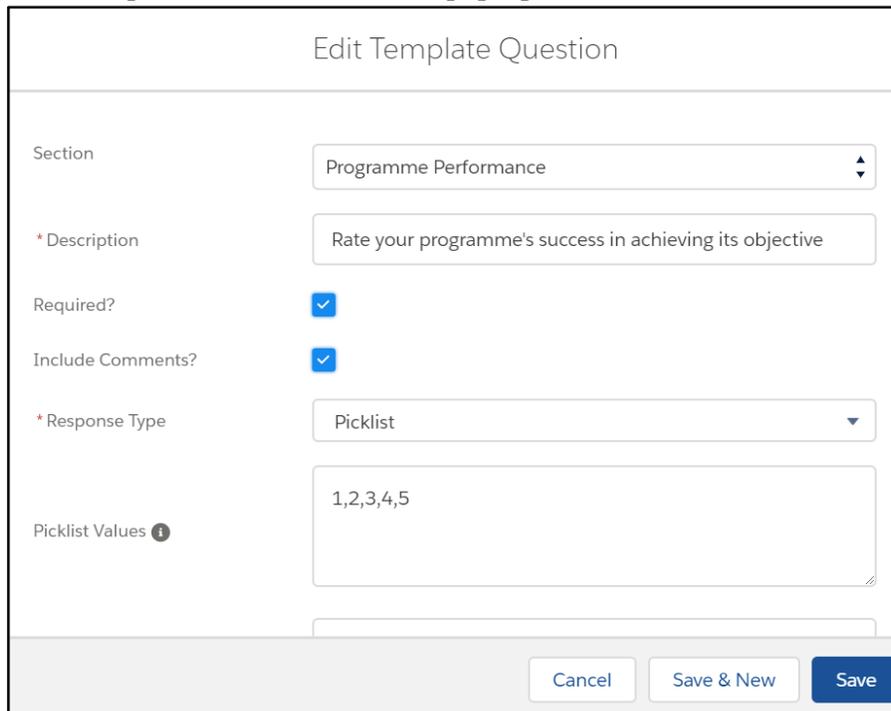
Response Type

Qualitative

Qualitative

Picklist

A pop-up will appear for the user to modify the Question information. Once the Question information has been updated, click Save in the pop-up.



**Edit Template Question**

Section: Programme Performance

\* Description: Rate your programme's success in achieving its objective

Required?

Include Comments?

\* Response Type: Picklist

Picklist Values: 1,2,3,4,5

Buttons: Cancel, Save & New, Save

- If the Description was changed, the new value will appear in the Question row on the Template Builder.
- If the Response Type was changed, the new value will appear in the Question row on the Template Builder.



- If the Section was changed, the Question will appear below the new related Section and underneath any Questions that already exist for that Section.

Questions can also be rearranged in the template using the drag and drop interface in the Template Builder.

4. Click and hold the three dots to the left of the Question row or the text box containing the Question Description.

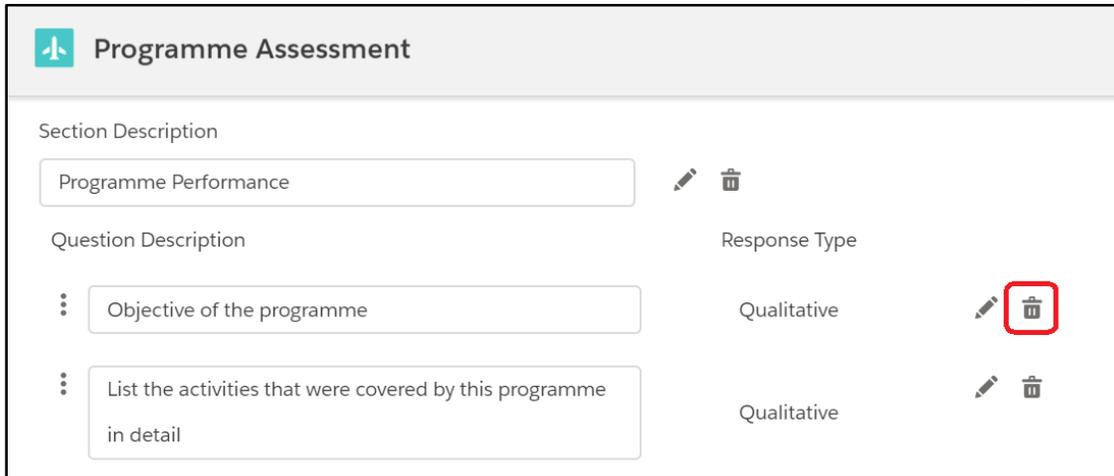
A screenshot of the Amp Impact Template Builder interface. The title bar reads "Programme Assessment". Below it, there is a "Section Description" field containing "Programme Performance". Underneath, there are three "Question Description" rows, each with a "Response Type" column. The first question is "Objective of the programme" with a "Qualitative" response type. The second is "List the activities that were covered by this programme in detail" with a "Qualitative" response type. The third is "Rate your programme's success in achieving its objective" with a "Picklist" response type. Each question row has a three-dot menu icon to its left and edit/delete icons to its right. The three-dot menu icon for the third question is highlighted with a red square.

5. While holding, move the Question row to the desired placement. A green bar will display to preview where the Question will be moved.
  - a. Questions can only be dragged and dropped within a Section (i.e. A Question cannot be dragged to be in another Section).
  - b. If a Question needs to be moved to a different Section, reassign the Section on the Question first and then drag it to the new placement.
6. Release the Question in the desired placement. The Question will appear in the new placement, and its `ampi__Order__c` value will automatically update. Any subsequent Questions in the Section will shift down a row, and their `ampi__Order__c` values will also automatically update.

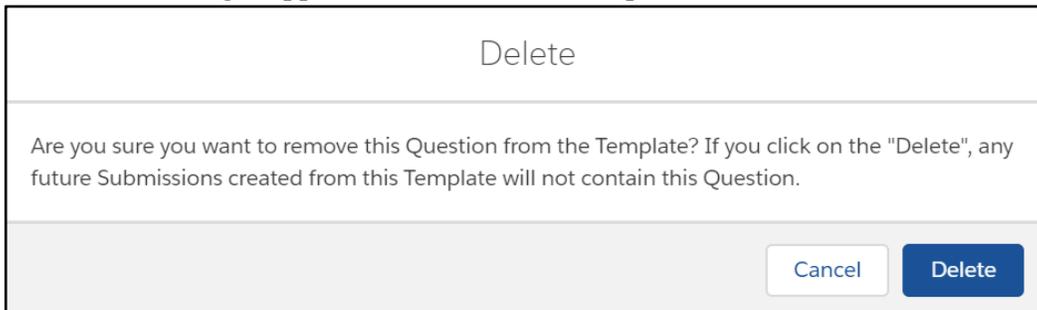
ⓘ When a Question is edited, any existing Submissions that had been created from the Template before the Question was edited **will not** be affected by the change. Any new Submissions created from the Template after the Question was edited **will reflect** the change.

## Remove Questions from a Template

If a Question needs to be removed, click the remove icon next to the Section's description.



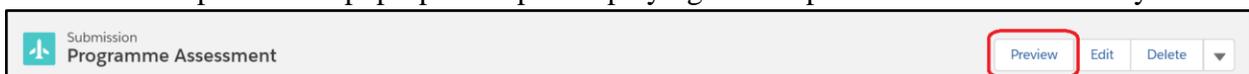
A pop-up will appear requesting the user to confirm the removal. Once the removal is confirmed, then the Question no longer appears as a row in the Template Builder.



① When a Question is removed, it is deactivated (i.e. the `ampi__Active__c` field on `ampi__Section__c` is set to FALSE), not deleted. Any existing Submissions that had been created from the Template before the Question is removed **will not** be affected by the change. Any new Submissions created from the Template after the Question is removed **will reflect** the change.

## Preview the Template

Click the Preview button on the submission template to view how the template, once assigned, will look to responders. A pop-up will open displaying the template interface in read-only mode.



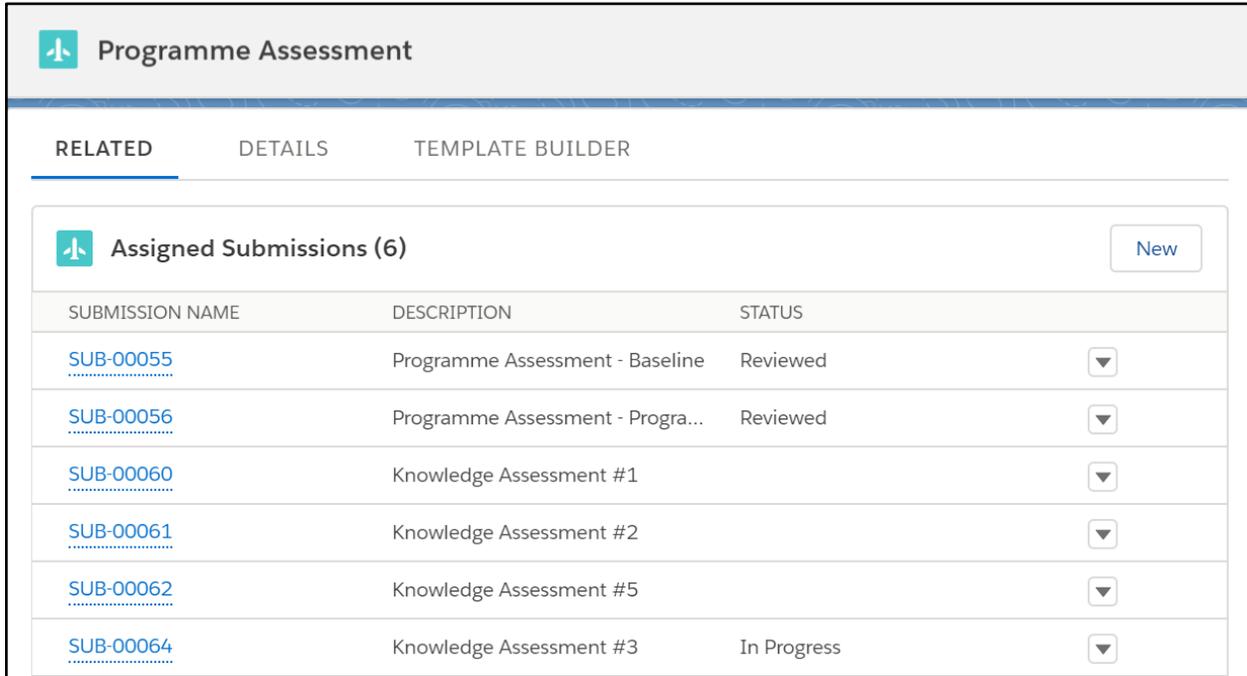
In the Preview pop-up, a Download button is also displayed at the top.



## Create and Assign Submissions from the Template

Once the submission template is ready to be sent out for responses, users can start copying the template and assigning to other users.

1. Open the Submission template that will be assigned.
2. Navigate to the Related tab and scroll to the Assigned Submissions related list.



**Programme Assessment**

RELATED    DETAILS    TEMPLATE BUILDER

**Assigned Submissions (6)** New

SUBMISSION NAME	DESCRIPTION	STATUS
<a href="#">SUB-00055</a>	Programme Assessment - Baseline	Reviewed
<a href="#">SUB-00056</a>	Programme Assessment - Progra...	Reviewed
<a href="#">SUB-00060</a>	Knowledge Assessment #1	
<a href="#">SUB-00061</a>	Knowledge Assessment #2	
<a href="#">SUB-00062</a>	Knowledge Assessment #5	
<a href="#">SUB-00064</a>	Knowledge Assessment #3	In Progress

3. Click the New button.
4. When prompted for a record type, select Submission and click Next.
5. Populate the custom lookup field with the record that the Submission will be related to.
6. Fill in any other fields and click Save.

Once the new submission is saved, it will display the same Sections and Questions as in the template from which it the submission was created.

## Clone the Template

If a template needs to be copied to reuse certain questions or sections in a new template, click the Clone Submission button on the template record.



Submission Programme Assessment Preview Edit Delete

Record Type  
Template Clone Submission



The submission template, sections and questions and any custom fields added to either of the three objects, will be cloned in a new record. Upon cloning the submission, the user will be automatically navigated to the newly created template. Values in the custom fields are also cloned and will display in the new template.

Only certain fields in each of the objects will be cloned:

- **ampi\_\_Submission\_\_c**
  - ampi\_\_Description\_\_c
  - ampi\_\_Guidelines\_\_c
  - ampi\_\_Parent\_Submission\_\_c
  - ampi\_\_Related\_To\_\_c
- **ampi\_\_Section\_\_c**
  - ampi\_\_Active\_\_c
  - ampi\_\_Default\_\_c
  - ampi\_\_Description\_\_c
  - ampi\_\_Instructions\_\_c
  - ampi\_\_Is\_Scored\_\_c
  - ampi\_\_Order\_\_c
  - ampi\_\_Parent\_Section\_\_c
- **ampi\_\_Question\_\_c**
  - ampi\_\_Active\_\_c
  - ampi\_\_Description\_\_c
  - ampi\_\_Include\_Comments\_\_c
  - ampi\_\_Instructions\_\_c
  - ampi\_\_Is\_Scored\_\_c
  - ampi\_\_Order\_\_c
  - ampi\_\_Parent\_Question\_\_c
  - ampi\_\_Picklist\_Values\_\_c
  - ampi\_\_Required\_\_c
  - ampi\_\_Response\_Type\_\_c

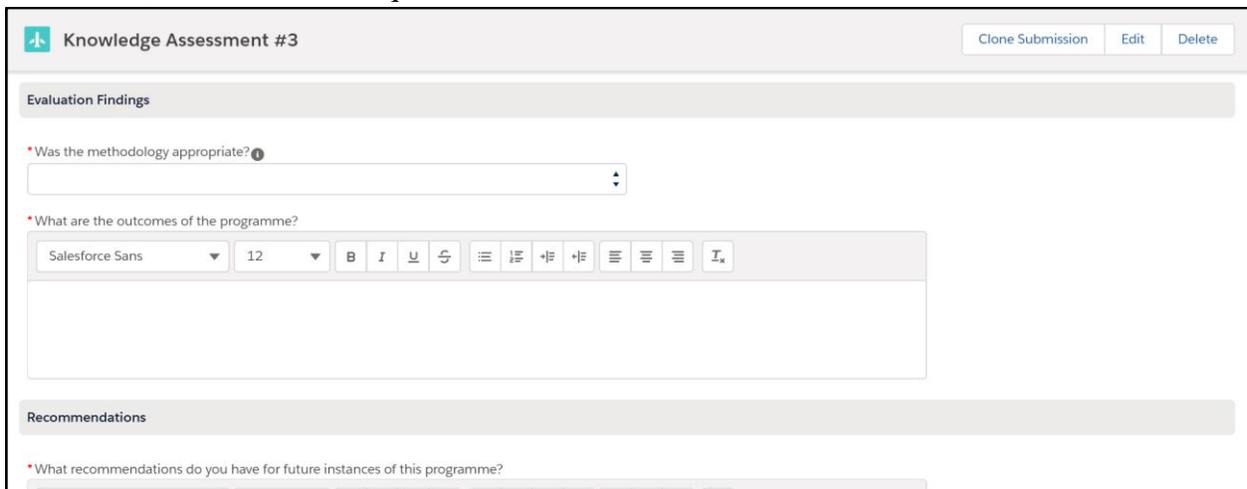
## Response Guide

Responses are the submissions copied from the submission template and assigned for other users to complete. They are created and assigned from the submission template record itself by the template users (e.g. program officers), and then filled out by other users (e.g. grantees) through the Submission Response Record Page.

### Fill Out the Submission Response

After a submission is created from a template, it is ready for users to answer the questions in the template.

1. Open the submission record that has been assigned.
2. If the submission is divided into sections, each section will appear over a horizontal grey bar, with their related questions listed below.



The screenshot shows a submission record titled "Knowledge Assessment #3". At the top right, there are buttons for "Clone Submission", "Edit", and "Delete". Below the title, there are two sections:

- Evaluation Findings**: This section contains two questions:
  - "\*Was the methodology appropriate?" with a dropdown menu.
  - "\*What are the outcomes of the programme?" with a rich text editor. The editor has a font dropdown set to "Salesforce Sans" and a size dropdown set to "12". It includes standard text formatting icons (bold, italic, underline, link, unlink, list, indent, outdent, align, justify, text color, background color).
- Recommendations**: This section contains one question:
  - "\*What recommendations do you have for future instances of this programme?"

- a. If a section has defined instructions (i.e. `ampi__Instructions__c` is populated on the `ampi__Section__c` record), those appear directly below the grey bar and above the section's questions.



The screenshot shows a submission record titled "Programme Performance". Below the title, there is a grey bar with the instruction "Answer all questions on programme performance" highlighted with a red box. Below this, there is a question:
 

- "\*Objective of the programme" with a rich text editor. The editor has a font dropdown set to "Salesforce Sans" and a size dropdown set to "12". It includes standard text formatting icons (bold, italic, underline, link, unlink, list, indent, outdent, align, justify, text color, background color).



3. Check if a question is required (i.e. `ampi__Required__c` is TRUE on the `ampi__Question__c` record) by noting whether or not it has a red asterisk displayed next to it.
  
4. Check if a question has any special instructions/criteria (i.e. `ampi__Instructions__c` is populated on the `ampi__Question__c` record) by hovering over the info icon to expand the help text.

The screenshot shows a rich text editor interface for a question titled "Objective of the programme". At the top, there is a header "Knowledge Assessment #3" and a sub-header "Programme Performance". Below this, a tooltip box contains the text: "Describe the central objective of the programme in 250 words or less." The main text area is currently empty. The editor includes a font dropdown set to "Salesforce Sans", a font size dropdown set to "12", and a toolbar with icons for bold (B), italic (I), underline (U), strikethrough (ABC), bulleted list, numbered list, link, unlink, indent, outdent, and text color (T<sub>x</sub>).

5. Respond to questions depending on the questions’ response types:
  - a. Text/Qualitative - users respond in a rich text editor, so they can type any text, insert images and tables, and format their entries as needed
    - i. Any qualitative values entered are saved in `ampi__Text_Response__c`
    - ii. If word limits are defined for `Question__c` values, either by system or another user (i.e., M&E manager or System Admin) , then the respondent will be unable to enter a qualitative response that exceeds the defined word limit.

This screenshot shows the same rich text editor as above, but with a response entered. The text in the editor reads: "The primary objective of this programme is to increase the number of children and youth engaged in extracurricular activities (including sports, arts, and skills-building workshops), which has been proven by extensive research to greatly improve outcomes later in life." The rest of the interface, including the font and toolbar, remains the same.

- b. Picklist - users will be able to select a single value from the pre-defined picklist. A checkmark appears to the left of the selected value in the dropdown.
      - i. Any picklist values entered are saved in `ampi__Picklist_Response__c`

\*Rate your programme's success in achieving its objective ⓘ

--None--

--None--

1

2

3

4

5

- c. Number - users will be able to enter a numeric value with up to 16 digits and 2 decimal places (i.e. 19 total characters)
  - i. Any numeric values entered are saved in `ampi__Number_Response__c`
  - ii. If a value entered exceeds the digit or decimal count, an error message will display to the user

\*How many months will you need for the initial implementation?

6

- d. Multi-select picklist - users will answer by selecting *multiple* values from a pre-defined picklist.
  - i. All picklist values entered are saved in long text area field `ampi__Multi_Select_Picklist_Response__c`
  - ii. A checkmark appears to the left of *all* selected values in the dropdown.
  - iii. After the user has selected multiple values, pills containing the picklist values appear in the field.
  - iv. The pills can be removed by clicking on the X symbol on the right side of every pill.

\*Select all countries where the project is operational

Bhutan X India X China X Thailand X |

--None--

✓ India

✓ Bhutan

✓ China

✓ Thailand

Russia

- 6. Add comments or explanations to the picklist or number answers.



- a. Some picklist or number questions may allow users to provide an explanation to their response. Users will be able to type directly into a text input box displayed next to the picklist or number input box to add that information.
- b. Any comments entered are saved in `ampi__Text_Response__c`

A screenshot of a form question. The question text is "\*What will be the total cost of the initial implementation?" followed by a question mark icon. To the right of the question is a text input box with the placeholder text "Please describe". Below the question is a text input box for the answer.

7. Click out of an input cell to save any entered answers. Once the user clicks out of the input cell, the information entered is automatically saved.

## Download the Response

For any offline work that might be required to complete the submission response, users can download the submission response by clicking the Download button at the top of the form to generate a Word document version of the submission.

A screenshot of a submission response form. The form title is "Knowledge Assessment #3". At the top right are buttons for "Clone Submission", "Edit", and "Delete". The main section is titled "RESPONSE" and contains three rows of text: "Description: Knowledge Assessment #3", "Guidelines", and "Parent Account: International Refugee Services". At the bottom right of the response section is a "Download" button, which is highlighted with a red box, and a "Submit" button. Below the response section is a text input field for "Name of individual responder" with a dropdown menu set to "Salesforce Sans", a font size of "12", and formatting options for bold, italic, underline, and strikethrough.

A pop-up will appear, prompting the user to confirm the download.

Download Knowledge Assessment #3

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Please confirm if you would like to download this submission as a Word Document. Note that any changes made to the word document should be entered manually into the online version before submitting.

Once the download is confirmed, a Word document version of the submission will download through the user’s browser, and they can open the document to view the submission.

- If any answers have been entered, those will be included below their related questions in the Word document.
- If an answer has not been entered for a question, the question will be displayed with either an input box with placeholder text or the list of picklist options

## Submit the Response

Once all answers have been entered and saved, users can submit their response to be reviewed and/or scored by clicking the Submit button at the top of the form.

 Knowledge Assessment #3

---

**RESPONSE**

Description  
Knowledge Assessment #3

Guidelines

Parent Account  
[International Refugee Services](#)

\* Name of individual responder

Salesforce Sans
12
B I U

☰ ☰ ☰ ☰ ☰ ☰ ☰ ☰ ☰ ☰
I<sub>x</sub>

A pop-up will appear, prompting the user to confirm their submission.

Submit Knowledge Assessment #3

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Please confirm if you would like to submit your response for review. Once your responses are submitted, they can no longer be modified.

Cancel Submit

After the user successfully confirms, the submission’s *Status* is updated to “Submitted”. If the user confirms with a required question that has been left unanswered, the user will be prevented from confirming their submission, and they will be prompted to address the required questions.

Successfully submitting the response will also lock the submission response from editing.

## Clone the Submission

If a submission needs to be copied because answers from the previous submission have not changed much, click the Clone Submission button on the template record.

 Knowledge Assessment #3

Clone Submission
Edit
Delete

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Programme Performance

Answer all questions on programme performance

\* Objective of the programme i

Salesforce Sans 12 B I U ↺

☰ ☰ ☰ ☰ ☰ ☰ ☰ ☰ ☰ ☰ ☰ ☰ ☰ ☰ ☰ ☰ ☰ ☰ ☰ ☰

The primary objective of this programme is to **increase the number of children and youth engaged in extracurricular activities** (including sports, arts, and skills-building workshops), which has been proven by extensive research to greatly improve outcomes later in life.

The submission, as well as its sections and answers, will be cloned in a new record, and the user will be automatically navigated to the newly created submission.

Only certain fields in each of the objects will be cloned:

- **ampi\_Submission\_\_c**



# Amp Impact

- `ampi__Description__c`
- `ampi__Guidelines__c`
- `ampi__Parent_Submission__c`
- `ampi__Related_To__c`
- **`ampi__Section__c`**
  - `ampi__Active__c`
  - `ampi__Default__c`
  - `ampi__Description__c`
  - `ampi__Instructions__c`
  - `ampi__Is_Scored__c`
  - `ampi__Order__c`
  - `ampi__Parent_Section__c`
- **`ampi__Question__c`**
  - `ampi__Active__c`
  - `ampi__Description__c`
  - `ampi__Include_Comments__c`
  - `ampi__Instructions__c`
  - `ampi__Is_Scored__c`
  - `ampi__Number_Response__c`
  - `ampi__Order__c`
  - `ampi__Parent_Question__c`
  - `ampi__Picklist_Response__c`
  - `ampi__Picklist_Values__c`
  - `ampi__Required__c`
  - `ampi__Response_Type__c`
  - `ampi__Text_Response__c`

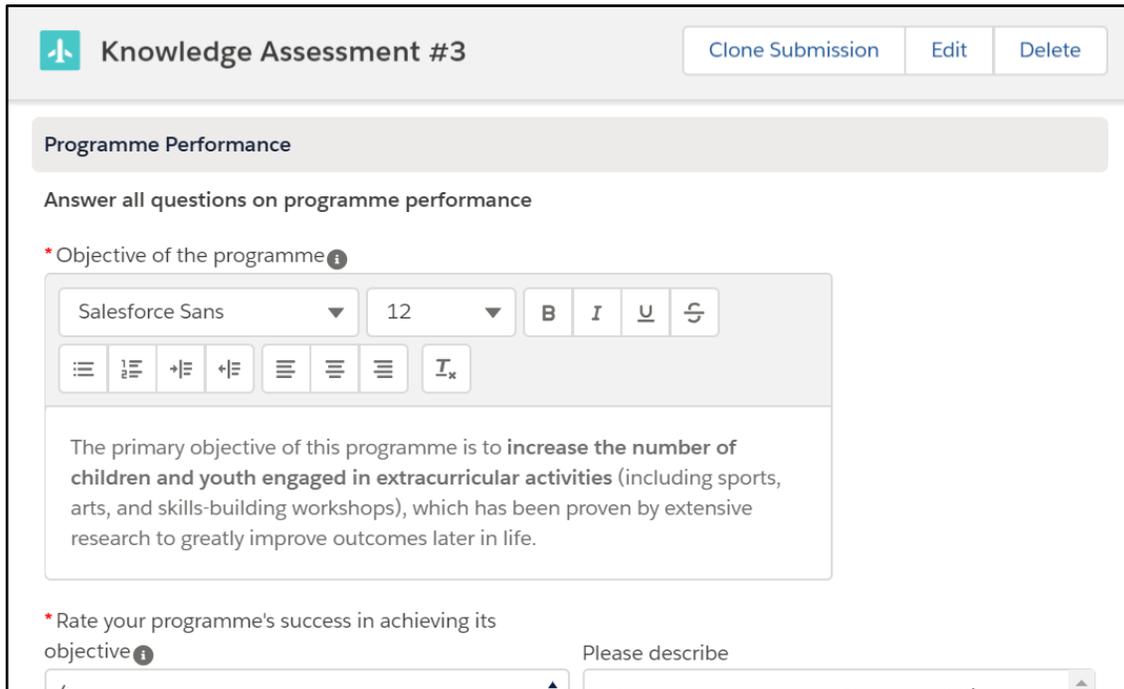
## Review Guide

Reviews are the submissions copied from the submission template that have already undergone the response stage and have been submitted for review. (i.e. They are the same record as in the Response stage, but accessed by different users with different visibility/interfaces.) Reviews are completed through the Submission Review Record Page.

## View and/or Modify the Submission Response

Once a Submission response has been submitted for review, reviewers can open, view, and modify the submitted response.

1. Open the Submission response record that has been submitted for review.
2. Click on the Response tab.
3. If the submission is divided into sections, each section will appear in a horizontal grey bar, with their related questions listed below.



The screenshot shows a submission review interface for "Knowledge Assessment #3". At the top right, there are buttons for "Clone Submission", "Edit", and "Delete". Below this is a grey bar labeled "Programme Performance". Underneath, the instruction "Answer all questions on programme performance" is displayed. A question titled "\*Objective of the programme" is shown with a red asterisk. The question content is displayed in a rich text editor with a toolbar showing "Salesforce Sans", "12", "B", "I", "U", and "Link" icons. The text of the question is: "The primary objective of this programme is to **increase the number of children and youth engaged in extracurricular activities** (including sports, arts, and skills-building workshops), which has been proven by extensive research to greatly improve outcomes later in life." Below the question, there is a rating section with a red asterisk and the text "\*Rate your programme's success in achieving its objective" and a "Please describe" input field.

- a. If a section has defined instructions (i.e. `ampi__Instructions__c` is populated on the `ampi__Section__c` record), those appear directly below the grey bar and above the section's questions.
4. Check if a question is required (i.e. `ampi__Required__c` is TRUE on the `ampi__Question__c` record) by noting whether or not it has a red asterisk displayed next to it.



\* Objective of the programme ⓘ

Salesforce Sans 12 B I U ↺

☰ ☰ ☰ ☰ ☰ ☰ ☰ I\_x

The primary objective of this programme is to **increase the number of children and youth engaged in extracurricular activities** (including sports, arts, and skills-building workshops), which has been proven by extensive research to greatly improve outcomes later in life.

- b. Picklist - responses are a single value from the pre-defined picklist
  - i. Any picklist values entered or changed are saved in `ampi__Picklist_Response__c`

\* Rate your programme's success in achieving its objective ⓘ

4

--None--

1

2

3

4

5

- c. Number - responses are a numeric value with up to two decimal points
  - i. Any numeric values entered or changed are saved in `ampi__Number_Response__c`

\* Amount in dollars spent implementing the project

20000

- ii. If a value entered exceeds the digit or decimal count, an error message will display to the user

\* Amount in dollars spent implementing the project

20000.99999

Invalid number

- d. Multi-select picklist - responses are *multiple* values from a pre-defined picklist.



- i. All picklist values entered or changed are saved in `ampi__Multi_Select_Picklist_Response__c`

A screenshot of a multi-select picklist form. The title is "\*Select all countries where the project is operational". At the top, there are four selected items: "Bhutan X", "India X", "China X", and "Thailand X". Below this is a scrollable list of options: "--None--", "✓ India", "✓ Bhutan", "✓ China", "✓ Thailand", and "Russia".

- 7. View/modify comments or explanations to picklist or number answers.
  - a. Some picklist or number responses have an added comment. Users will be able to type directly into a text input box displayed next to the picklist or number input box to modify that information.
  - b. Any comments entered or changed are saved in `ampi__Text_Response__c`

A screenshot of a form with two parts. The first part is a rating question: "\*Rate your programme's success in achieving its objective". The rating is set to "4". The second part is a text area with the prompt "Please describe" and the text: "The programme was mostly successful in achieving its primary objective. Some improvement could be made in the consistency of the engagement of beneficiaries".

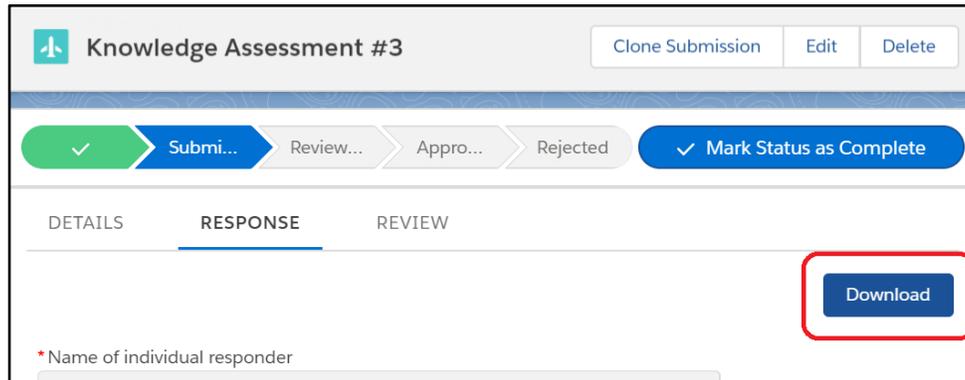
- 8. Click out of an input cell to save any modified answers. Once the user clicks out of the input cell, the information entered is automatically saved.

The reviewing users ability to view or modify the response depends on the permissions that have been set for them on the Question object. For example, if the user has read-only access on the `ampi__Picklist_Response__c`, `ampi__Number_Response__c`, and `ampi__Qualitative_Response__c` fields, then the component will be read-only.

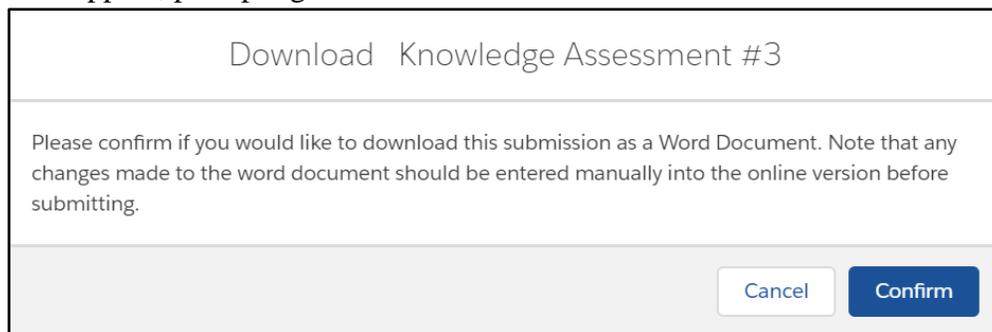
A screenshot of a form section titled "Section A" with the instruction "To be completed by all service providers." Below this is a question: "\*Are credit insurance agencies (ECAs) from other countries included in the performance of the project?". The answer is "No". To the right of the answer is a text area with the prompt "Please describe" which is currently empty.

## Download the Submission Response

For any offline work that might be required to read or modify the submission response, users can download the submission response by clicking the Download button at the top of the form to generate a Word document version of the submission.



A pop-up will appear, prompting the user to confirm the download.



- All answers that have been entered are included below their related questions in the Word document.
- If an answer has not been entered for a question, the question will be displayed with either an input box with placeholder text or the list of picklist options.

## Assign Scores to Answers in a Submission Review

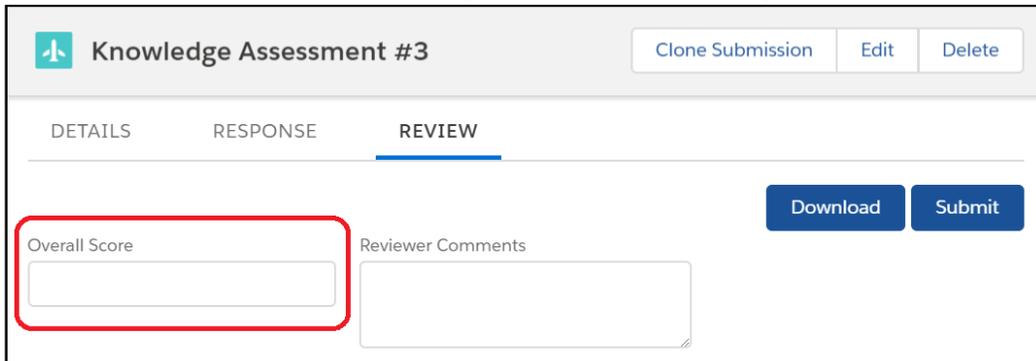
Alongside reading and modifying submitted responses, reviewers can assign scores to individual answers to questions, as well as overall scores to entire sections or the whole submission.

1. Open the Submission response record that has been submitted for review.
2. Click on the Review tab.
3. If no automation is set up, assign an overall score to the entire submission.

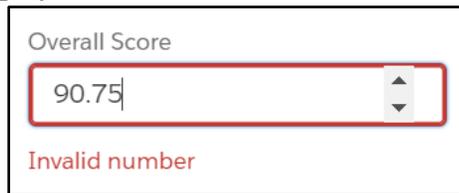


# Amp Impact

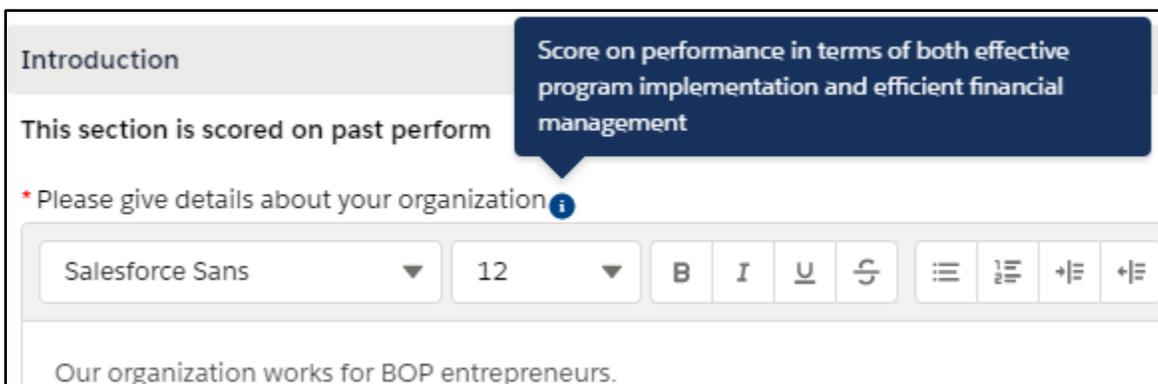
- a. The Overall Score field is displayed at the top of the component, into which reviewers can directly enter a value with up to six whole number digits and one decimal value (i.e. total of eight characters, including the decimal marker).



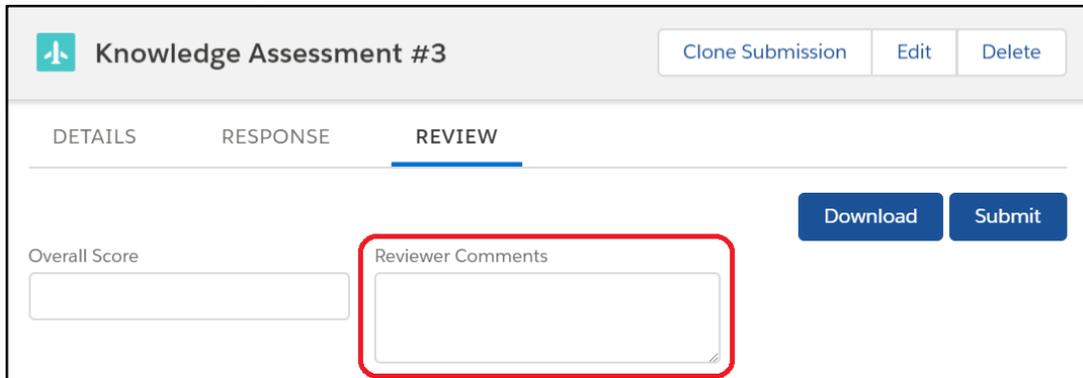
- i. The number value entered is saved in `ampi__Overall_Score__c` on the `ampi__Submission__c` record.
- ii. If the value entered exceeds the digit or decimal count, an error message will display to the user



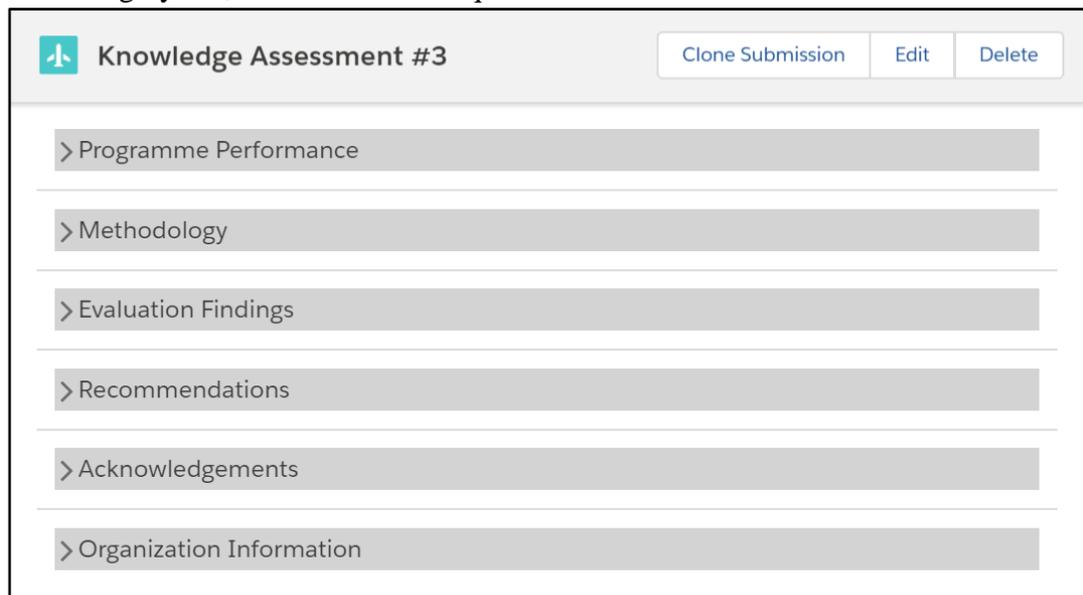
- b. Check help text and instructions for the reviewer by hovering over the icon (Reviewer\_Instructions\_\_c field on Question\_\_c and Section\_\_c records) that provides scoring guidance for each question. These instructions may be different from the instructions given to respondents. See screenshot below.



- c. The Reviewer Comments field is displayed next to the Overall Score field at the top of the component. Reviewers can directly enter a text value to provide additional context to the score assigned to the submission.
  - i. The text value entered is saved in `ampi__Reviewer_Comments__c` on the `ampi__Submission__c` record.

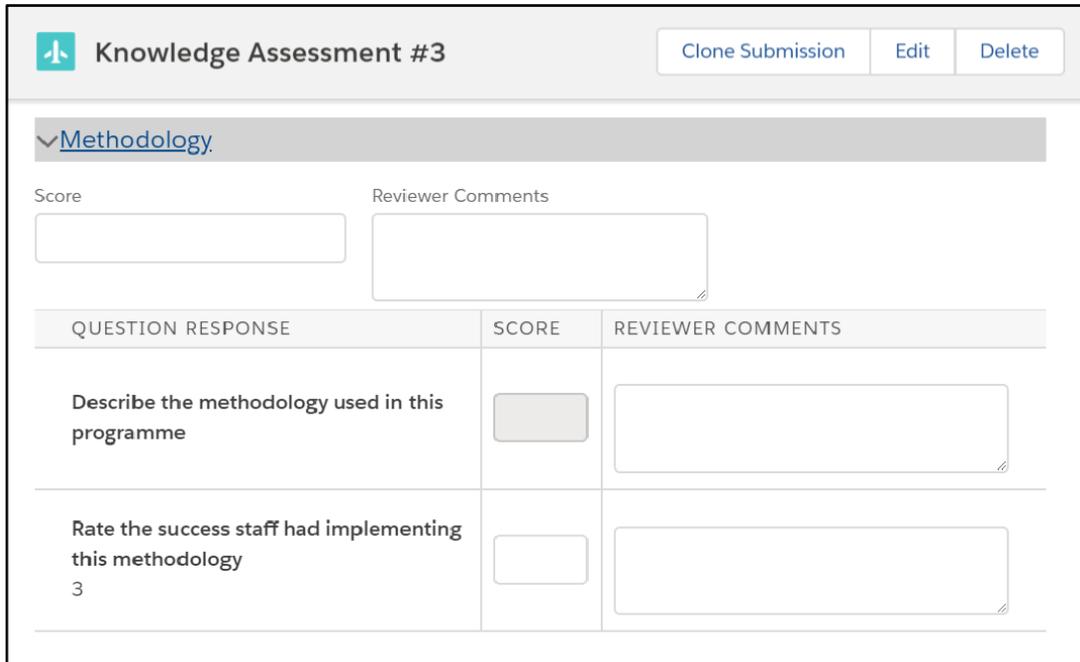


- 4. If no automation is set up, assign overall scores to sections.
  - a. If the submission is divided into sections, each section will appear in a horizontal grey bar, with their related questions listed below.



- b. By default, all sections are collapsed, and their related questions are hidden. Expand a section and display its related questions by clicking on the section's

grey bar. Only one section can be displayed at a time, and it can only be collapsed by expanding another section.



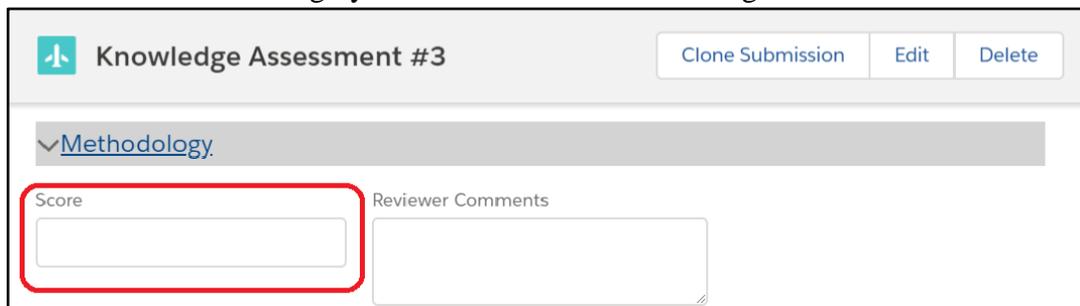
Knowledge Assessment #3 Clone Submission Edit Delete

Methodology

Score  Reviewer Comments

QUESTION RESPONSE	SCORE	REVIEWER COMMENTS
Describe the methodology used in this programme	<input type="text"/>	<input type="text"/>
Rate the success staff had implementing this methodology 3	<input type="text"/>	<input type="text"/>

- c. The Score field is displayed beneath the section's grey bar, and reviewers can directly enter a value with up to six whole number digits and one decimal value (i.e. total of eight characters, including the decimal marker).
  - i. The number value entered is saved in `ampi__Score__c` on the `ampi__Section__c` record.
  - ii. If the value entered exceeds the digit or decimal count, an error message will display to the user.
  - iii. If `ampi__Is_Scored__c` is FALSE, then the input field for entering scores will be greyed out and locked from editing.



Knowledge Assessment #3 Clone Submission Edit Delete

Methodology

Score  Reviewer Comments



- d. The Reviewer Comments field is displayed next to the Overall Score field at the top of the component. Reviewers can directly enter a text value to provide comments on the submitted Section.
  - i. The text value entered is saved in `ampi__Reviewer_Comments__c` on the `ampi__Section__c` record.

- 5. Assign scores to individual answers in the Scores component.
  - a. For each section in the submission, a table with three columns will display below the section header for reviewers to score answers.

QUESTION RESPONSE	SCORE	REVIEWER COMMENTS
<b>Objective of the programme</b> The primary objective of this programme is to <b>increase the number of children and youth engaged in extracurricular activities</b> (including sports, arts, and skills-building workshops), which has been proven by extensive research to greatly improve outcomes later in life.	<input type="text"/>	<input type="text"/>
<b>Rate your programme's success in achieving its objective</b> 4 The programme was mostly successful in achieving its primary objective. Some improvement could be made in the consistency of the engagement of beneficiaries (i.e., more beneficiaries were engaged, but many of them only for one or two sessions rather than repeatedly)	<input type="text"/>	<input type="text"/>

- i. Question Response: Contains the following field values on `ampi__Question__c` listed vertically
  - 1. `ampi__Description__c`



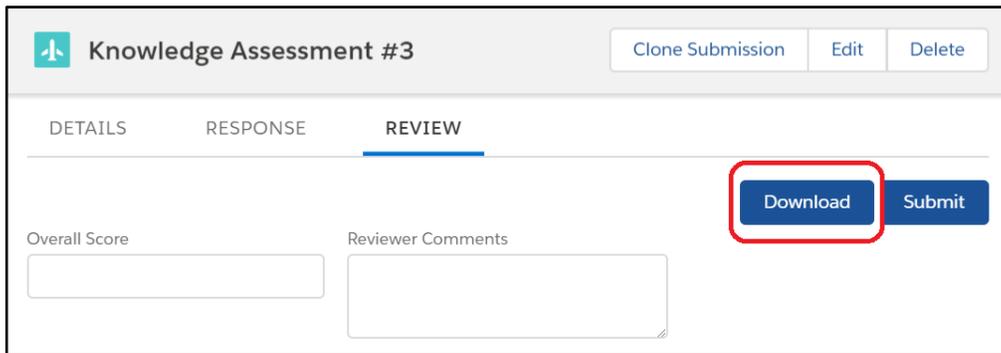
# Amp Impact

2. `ampi__Text_Response__c`, `ampi__Picklist_Response__c`, OR `ampi__Number_Response__c` (depending on the value selected in `ampi__Response_Type__c`)
  3. `ampi__Text_Response__c` (only if comments have been entered for picklist or number responses)
- ii. Score: Contains input boxes into which reviewers can assign a score to the question response
1. Reviewers can directly enter a value with up to six whole number digits and one decimal value (i.e. total of eight characters, including the decimal marker).
  2. If the value entered exceeds the digit or decimal count, an error message will display to the user.
  3. The number value entered is saved in `ampi__Score__c` on the `ampi__Question__c` record.
  4. If `ampi__Is_Scored__c` is FALSE, then the input field for entering scores will be greyed out and locked from editing.
- iii. Reviewer Comments: Contains input boxes into which reviewers can add comments on the submitted Answer.
1. The text value entered is saved in `ampi__Reviewer_Comments__c` on the `ampi__Question__c` record.

Once scores have been entered, users can either [download scores](#) as a Word document or [submit their scores](#) for a final review.

## Download Scores for Review

For any offline work that might be required to review and/or score the submission response, users can download the submission response and scores by clicking the *Download* button at the top of the component to generate a Word document version of the submission scoring framework.



The screenshot shows the 'Knowledge Assessment #3' interface. At the top, there are three buttons: 'Clone Submission', 'Edit', and 'Delete'. Below these, there are two buttons: 'Download' and 'Submit'. The 'Download' button is highlighted with a red box. Below the buttons, there are two input fields: 'Overall Score' and 'Reviewer Comments'.



A pop-up will appear, prompting the user to confirm the download.

Download Knowledge Assessment #3

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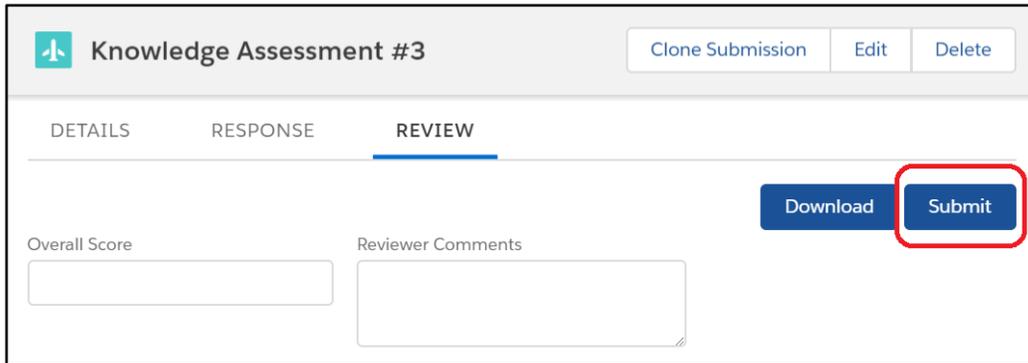
Please confirm if you would like to download this submission score as a Word Document. Note that any changes made to the word document should be entered manually into the online version before submitting.

- Overall Score and Reviewer Comments for the entire submission are printed at the top of the Word document, underneath the header.
- Section Score and Reviewer Comments fields are displayed below the relevant Section (and its instructions, if any exist).
  - If `ampi__Is_Scored__c` on the Section is FALSE, then the Section will be marked as Unscored in the Score field.
- Question Score and Reviewer Comments fields are displayed below the relevant Question (and its instructions, if any exist) and the response / comment values.
  - All question responses that have been entered are included below their related questions in the Word document.
  - If an answer has not been entered for a question, the question will be displayed with an input box with placeholder text.
- If a score has not been assigned to an answer, the Score field is displayed as blank.
  - If `ampi__Is_Scored__c` on the Question is FALSE, then the Question will be marked as Unscored in the Score field.
- If a reviewer comment value has not been entered, an input box with placeholder text will be displayed in the Word document.

## Submit the Final Submission Review

Once all scores have been entered and saved, reviewers can submit their scores to be approved by clicking the Submit button at the top of the form. A pop-up will appear, prompting the user to confirm the submission of the review. After the user confirms, the submission's Status is updated to "Reviewed".

ⓘ There is no validation checking that all Score values have been filled out, so Reviewers can submit their reviews successfully even if they have left any of the Scores or Comments blank.



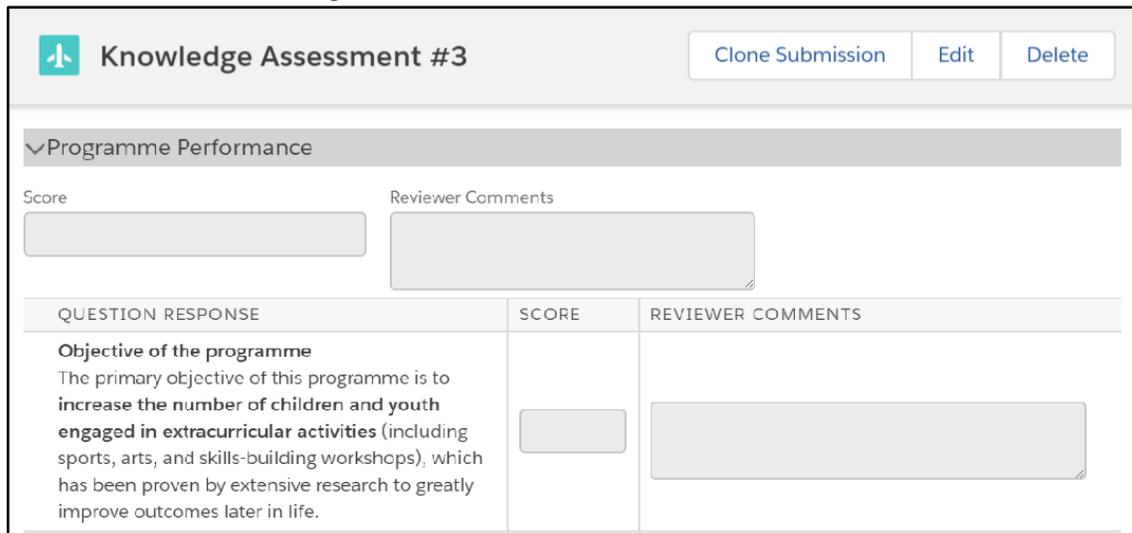
**Knowledge Assessment #3** Clone Submission Edit Delete

DETAILS    RESPONSE    **REVIEW**

Overall Score     Reviewer Comments

Download Submit

Clicking on submit changes the value in the `ampi__Status__c` picklist to = “Reviewed”. This action locks scores from being further edited.



**Knowledge Assessment #3** Clone Submission Edit Delete

Programme Performance

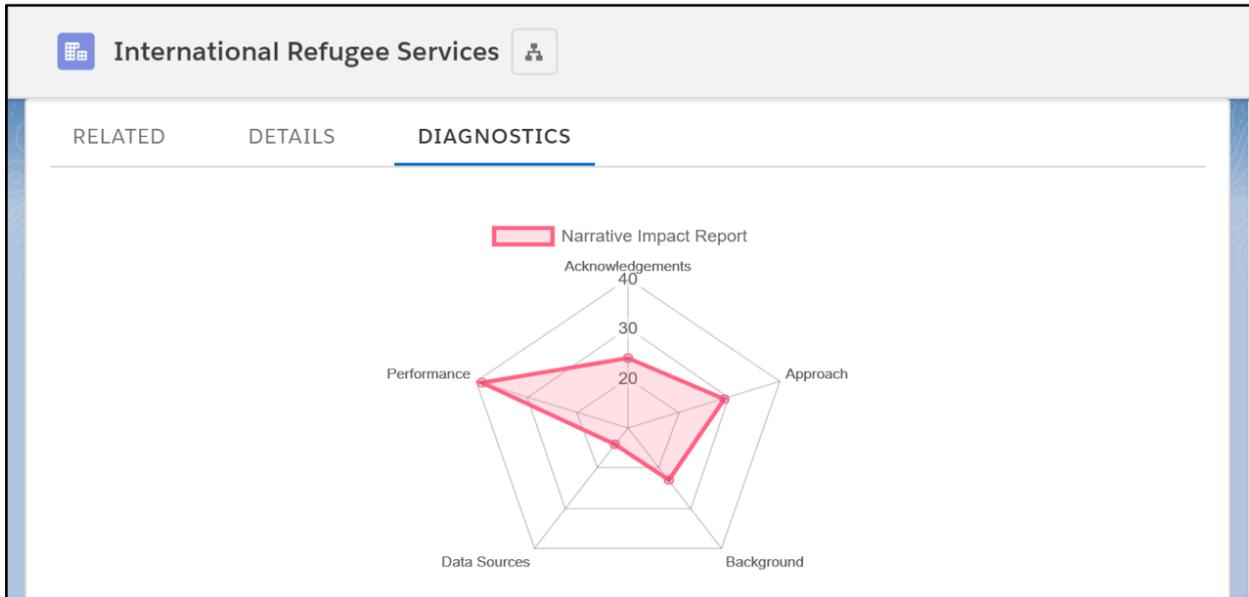
Score     Reviewer Comments

QUESTION RESPONSE	SCORE	REVIEWER COMMENTS
<b>Objective of the programme</b> The primary objective of this programme is to <b>increase the number of children and youth engaged in extracurricular activities</b> (including sports, arts, and skills-building workshops), which has been proven by extensive research to greatly improve outcomes later in life.	<input type="text"/>	<input type="text"/>

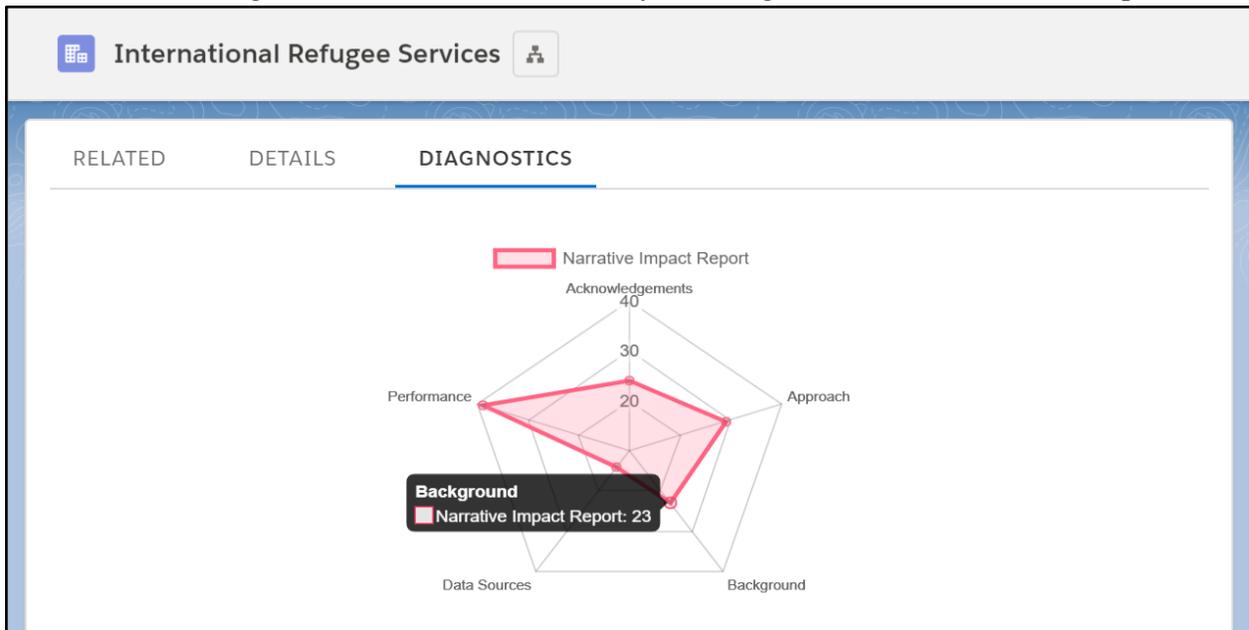
## View Radar Charts

As soon as at least one submission with sections has been scored, the radar chart component will become visible on the submission’s parent record.

**NOTE:** The user’s access to this component depends on how the System Admin has configured the parent object’s Lightning record page while setting up the Submissions feature.



Each corner of the displayed radar chart represents and is labeled by the sections on the submission. Each mapped point on the radar chart represents the `ampi__Score__c` value on the `ampi__Section__c` that is displayed. The scale of the radar chart dynamically renders based on the minimum and maximum score values, with a default value of 0 at the center. Users can see the exact score assigned to a submission section by hovering their cursor over the chart point.

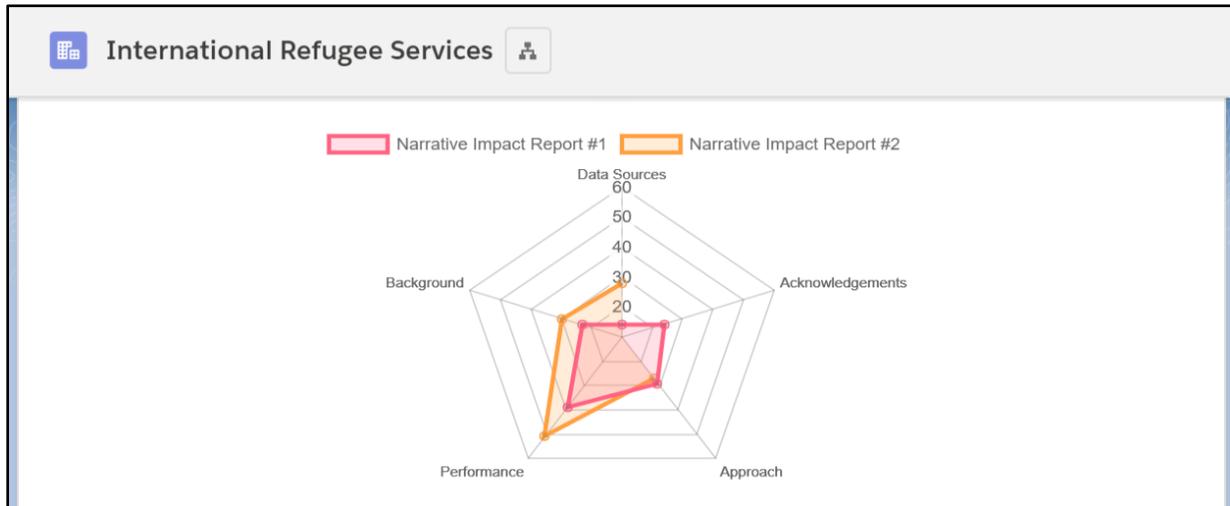


As long as a section has been added to the Template, it will display in the radar chart, even if the section has since been removed from the template.

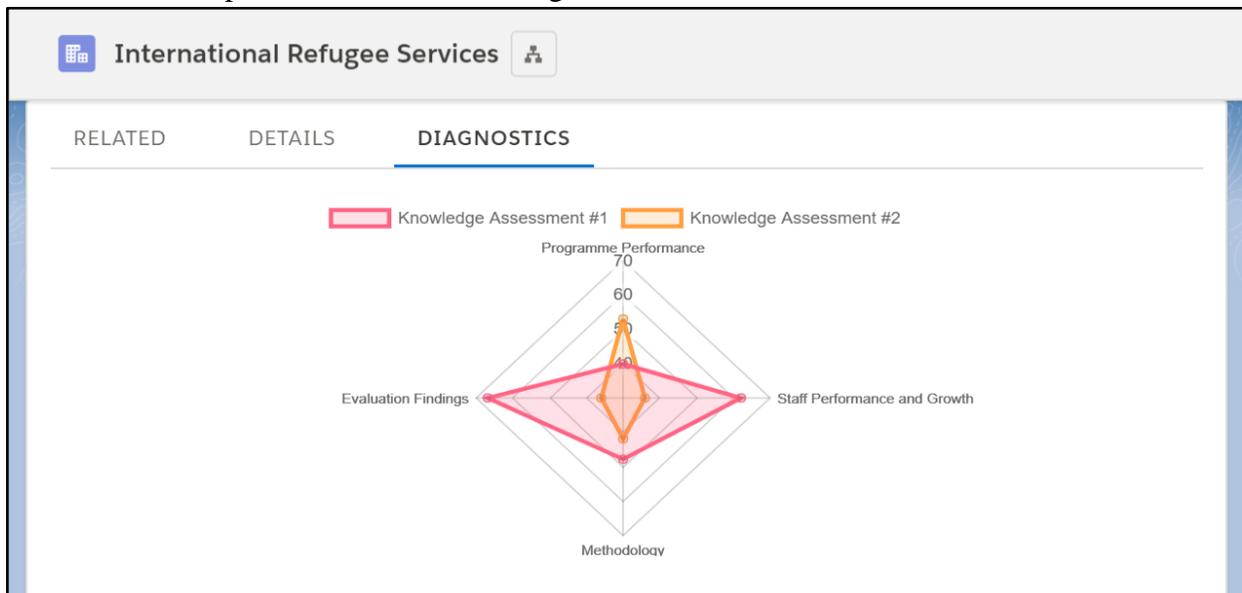


# Amp Impact

For example, the Narrative Impact Report template is originally created with an Acknowledgements section. The template is copied to create submissions, which are completed and scored. The Acknowledgements section is subsequently removed. The updated template is copied to create additional submissions that are assigned to the same record. On that record, the Acknowledgements section will still display in the radar charts even though it was removed from the template, because it had previously been assigned scores.



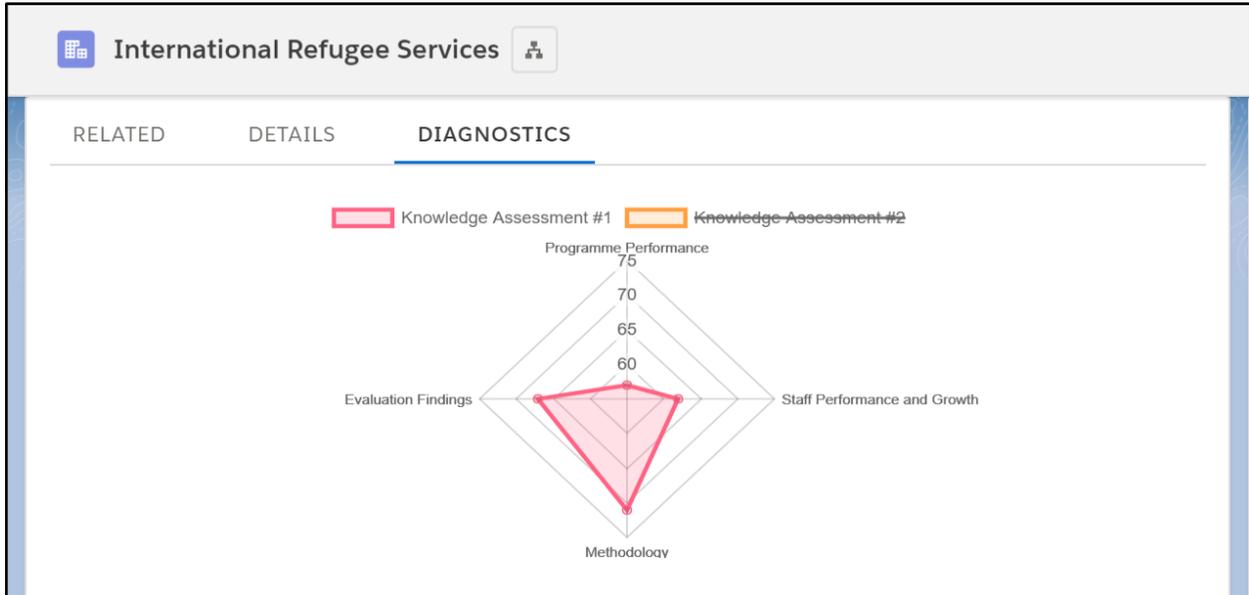
If multiple submissions created from the same template have been assigned to the same parent record, they are displayed with different colors on the same radar chart. A legend is displayed above the radar chart, indicating which color is assigned to each submission and displaying the submissions in alphabetical order according to the Submission name.



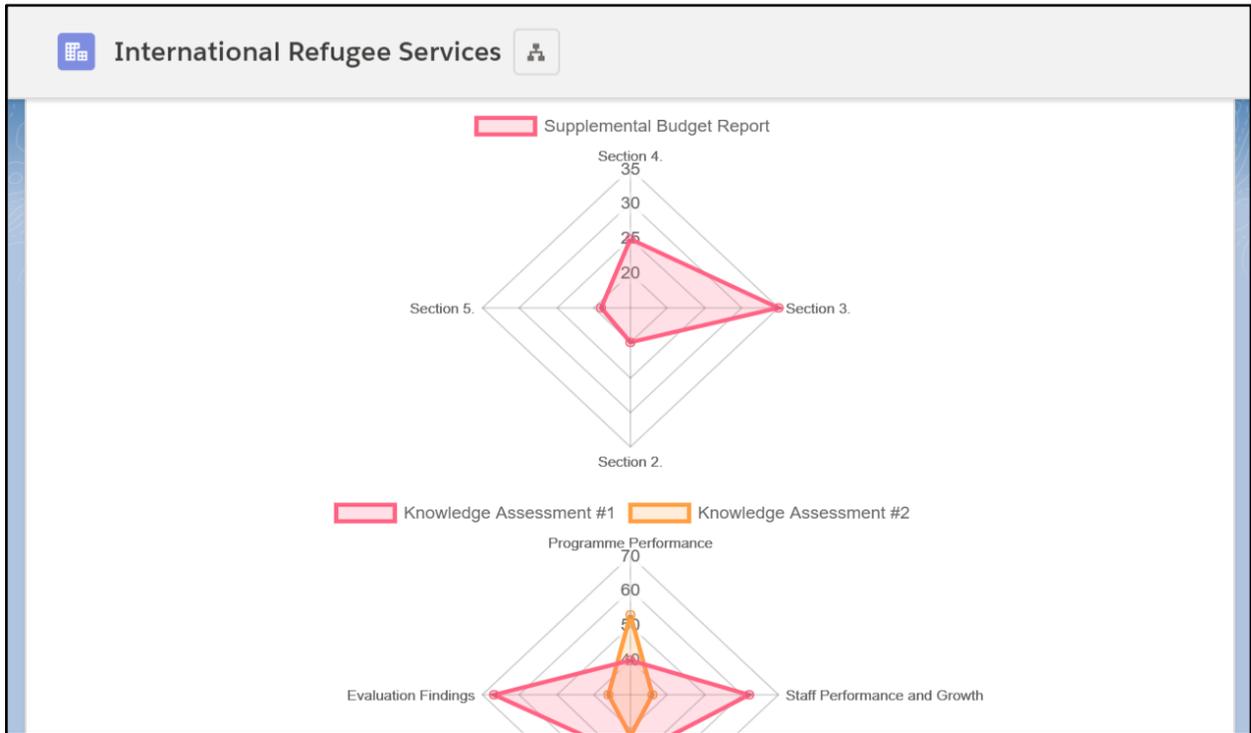


# Amp Impact

Users can toggle the view of the radar chart by clicking on the submission descriptions in the legend to hide/display each in the radar chart. When the radar chart for a submission is hidden, its Description will be crossed out and its values are not displayed in the chart. The radar chart may dynamically re-render based on the minimum and maximum section score values on the displayed submissions.



If multiple submissions created from different templates have been assigned to the same parent record, multiple radar charts are displayed in a column - one radar chart per original template. These radar charts will display in alphabetical order according to Template name.

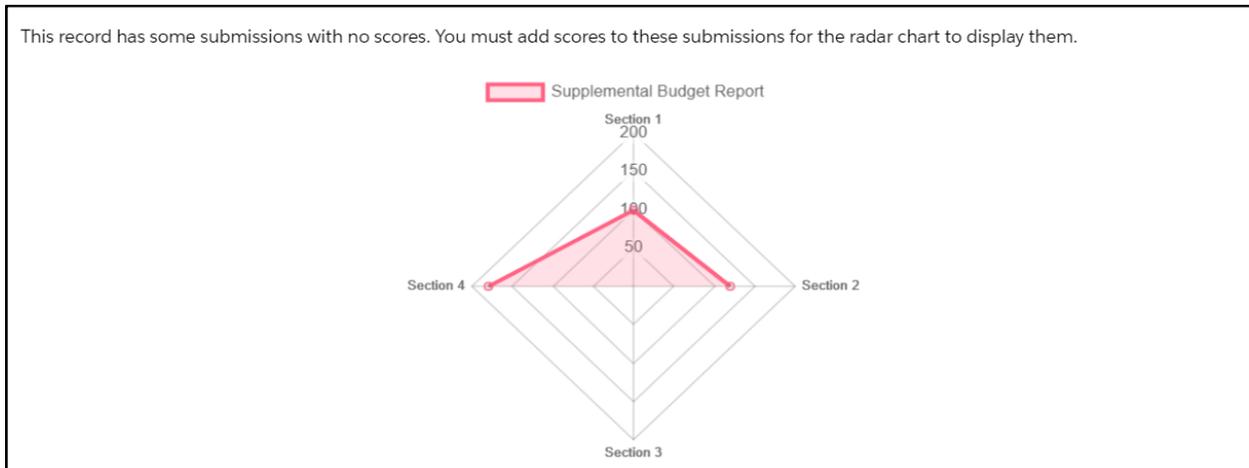




# Amp Impact

If a Section\_\_c in the assigned Submission is unscored (Is\_Scored\_\_c = FALSE), the section does not display in the Radar Chart.

If one or more Sections where Is\_Scored\_\_c = TRUE have no scores, the Radar Chart displays a blank score as a disconnected point in the chart where a closed shape is not drawn. See screenshot below.



The radar chart does not render when there are no assigned Submission records present, or when there is one or more assigned Submissions where Sections are unscored (Is\_Scored\_\_c = FALSE). See screenshot below.

Attachments   Details   Financials   **Radar Charts**

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This record does not have any related submissions with scores. You must either create a new submission and score it or add scores to existing submissions for the radar chart to display.