Implementation Plans & Activities

January 2019

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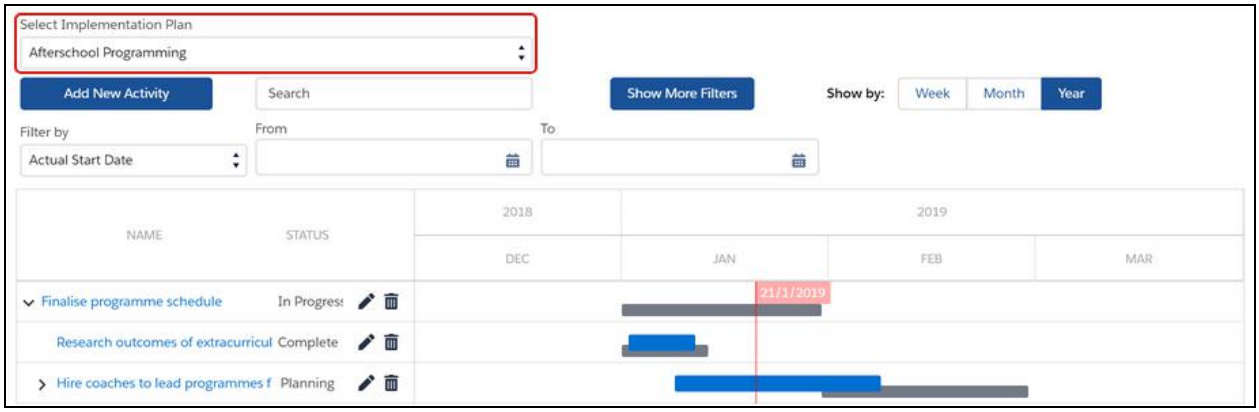
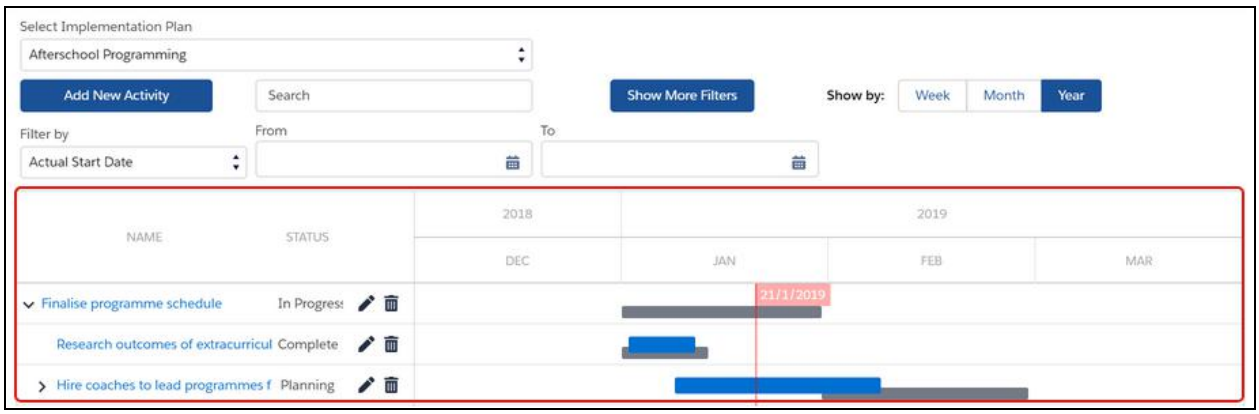
Overview: The ActivityChart Lightning Component enables users to create, manage, and track progress for Activities in an Implementation Plan by displaying a Gantt chart view of all the Activities and sub-Activities within that Implementation Plan.

Terminology

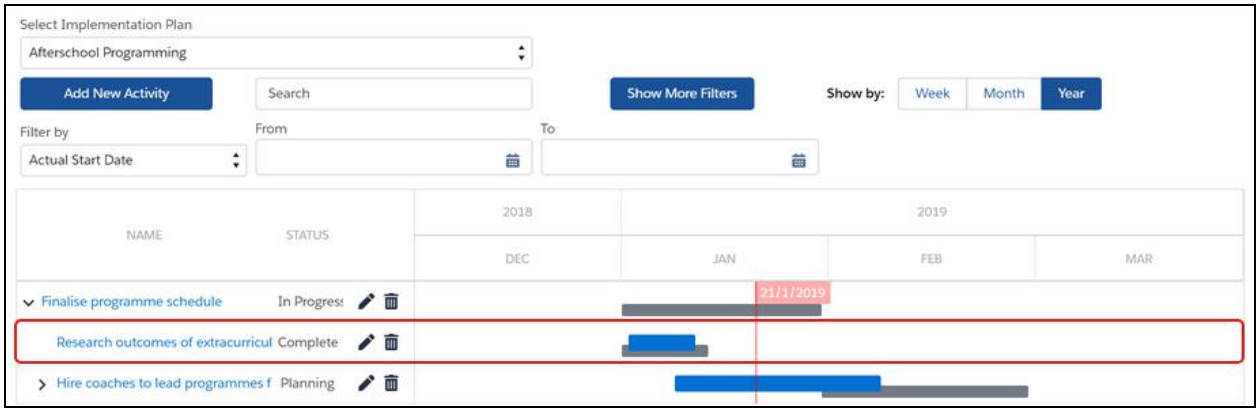
Implementation Plan: A planning document that tracks the progress of a project's implementation. A single Implementation Plan consists of numerous Activities that must be carried out for the plan to be considered complete.



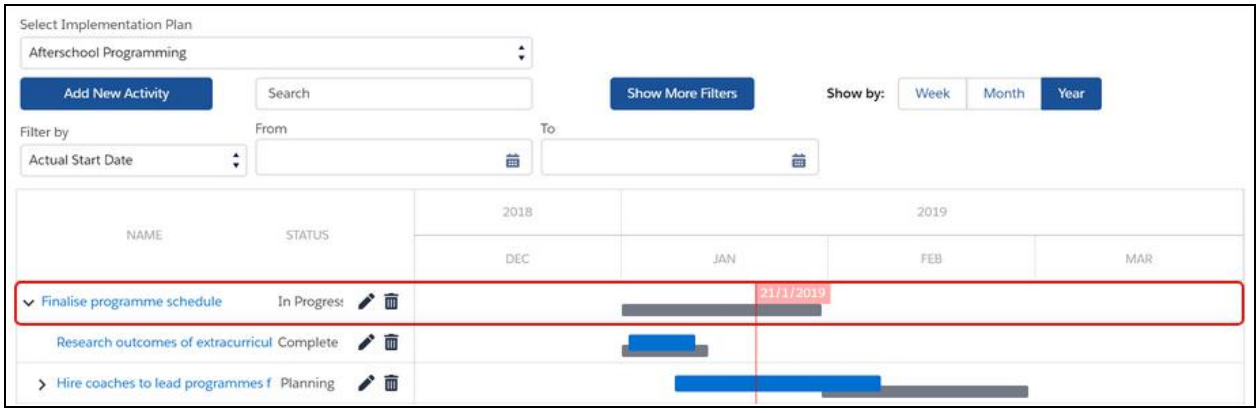
Activity Table: The chart display of all the Activities belonging to a single Implementation Plan. This includes both Activity details and Timeline information for all Activities.



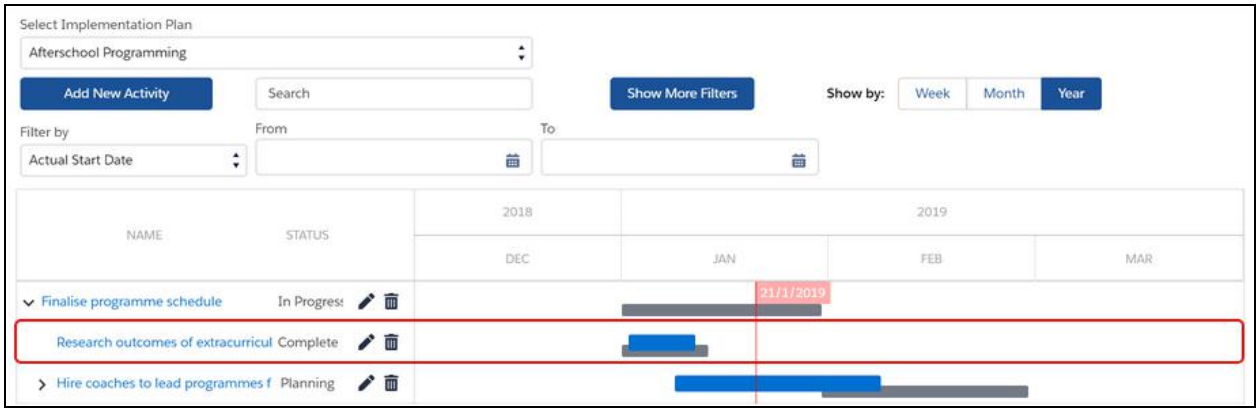
Activity Row: A single Activity displayed within the Activity Table. This includes the Activity details and Timeline information for that specific Activity.



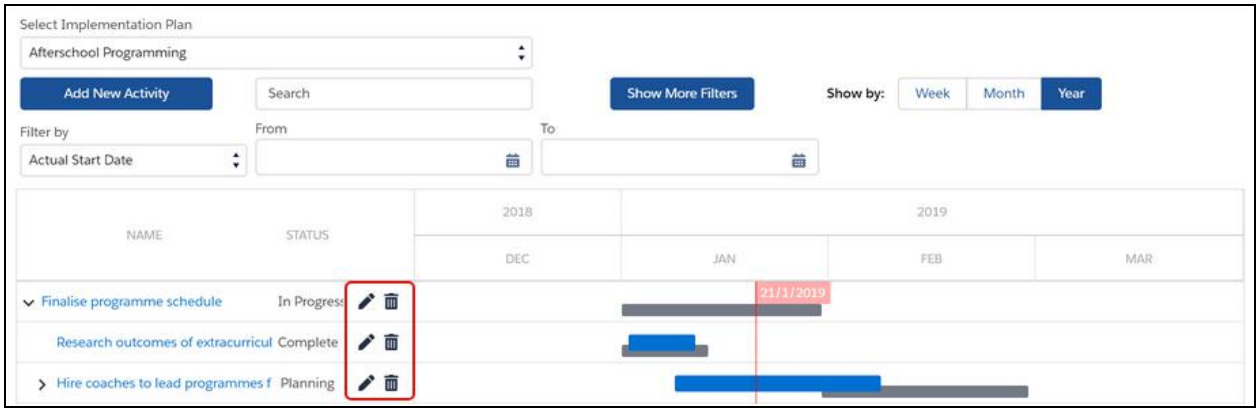
Parent Activity: An Activity that has at least one Child or sub-Activity. Those sub-Activities can be hidden by collapsing them beneath the Parent Activity.



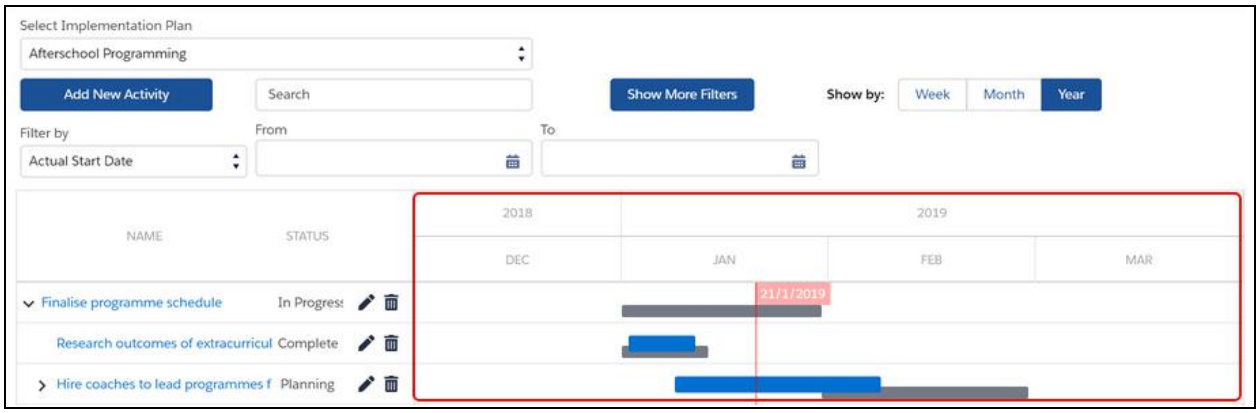
Child Activity: An Activity that has a Parent Activity. The Child Activity can be hidden by collapsing them beneath the Parent Activity.



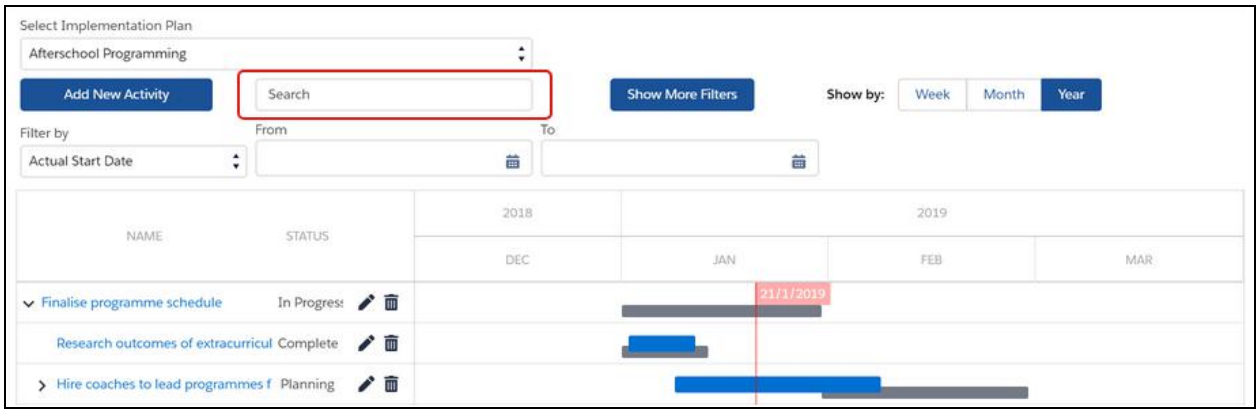
Action Icons: The column after the Activity details that contains a Pencil and Garbage Bin icon. These icons can be used to edit and/or delete Activities.



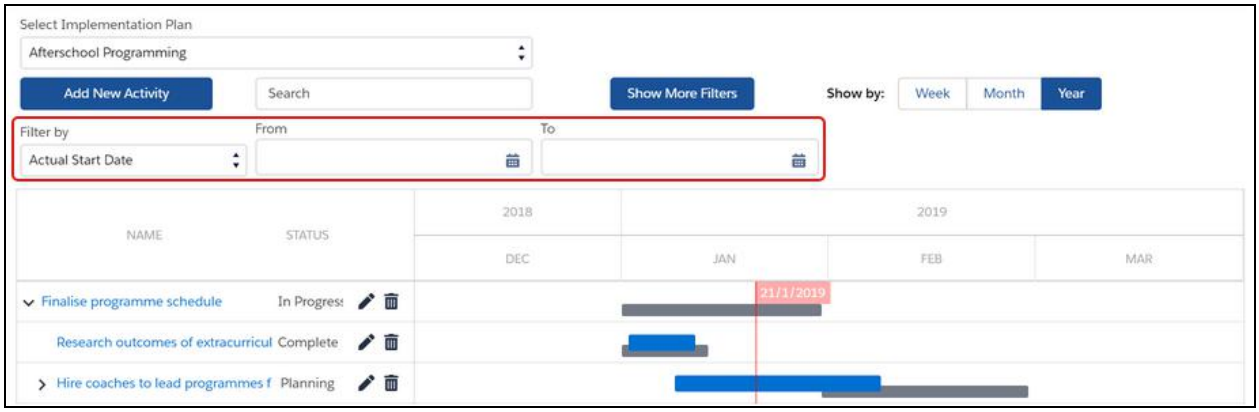
Timeline: The final column in the Activity Table, containing planned and actual date information for each Activity in an Implementation Plan in a Gantt Chart view. The Timeline display is controlled by the values in the four date fields on Activity.



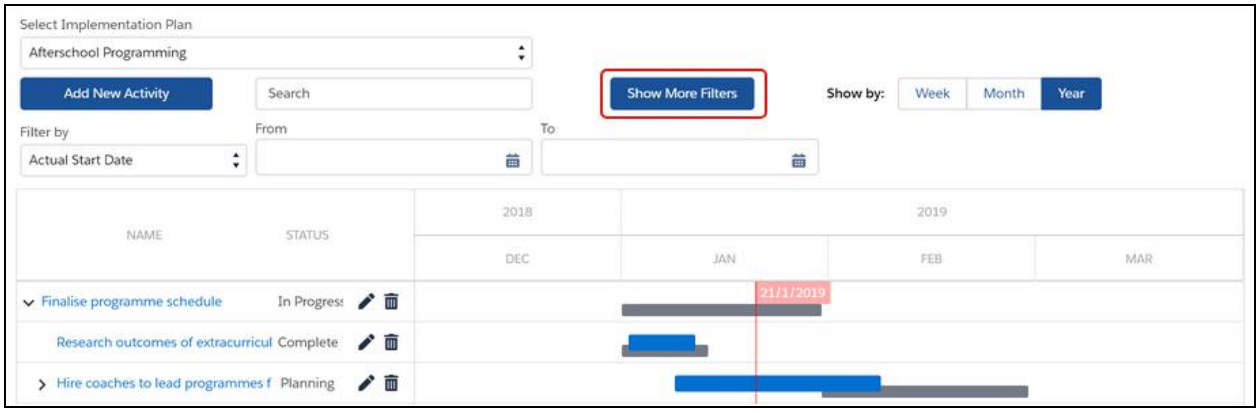
Search Bar: A default filter in which the user can directly type in search criteria to find matching Activities.



Date Filter: A default filter in which the user can directly select a date range for a specific date field to find matching Activities.



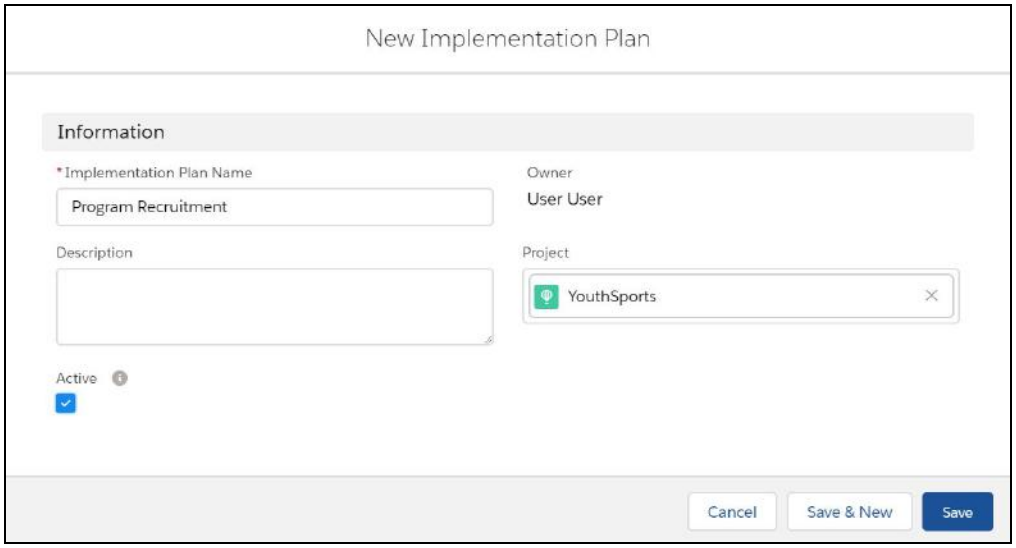
Additional Filters: A filter interface that can be customized depending on what Activity fields are used by an organization.



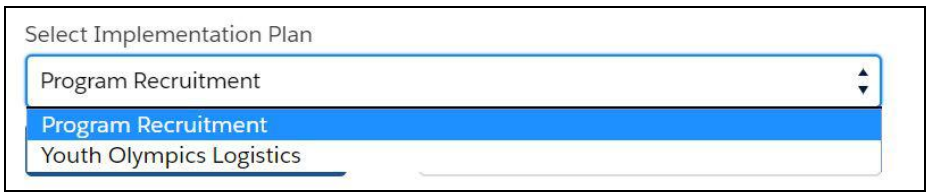
Create an Implementation Plan for a Project

From the *Setup* tab on a Project record, scroll down to the *Implementation Plans* related list and click "New" to create a new Implementation Plan.

a. Only the *Name* and *Project* fields are required.



b. *Active* field is required to be TRUE if the Implementation Plan should be displayed in the Implementation Plan picklist for users to view and edit.



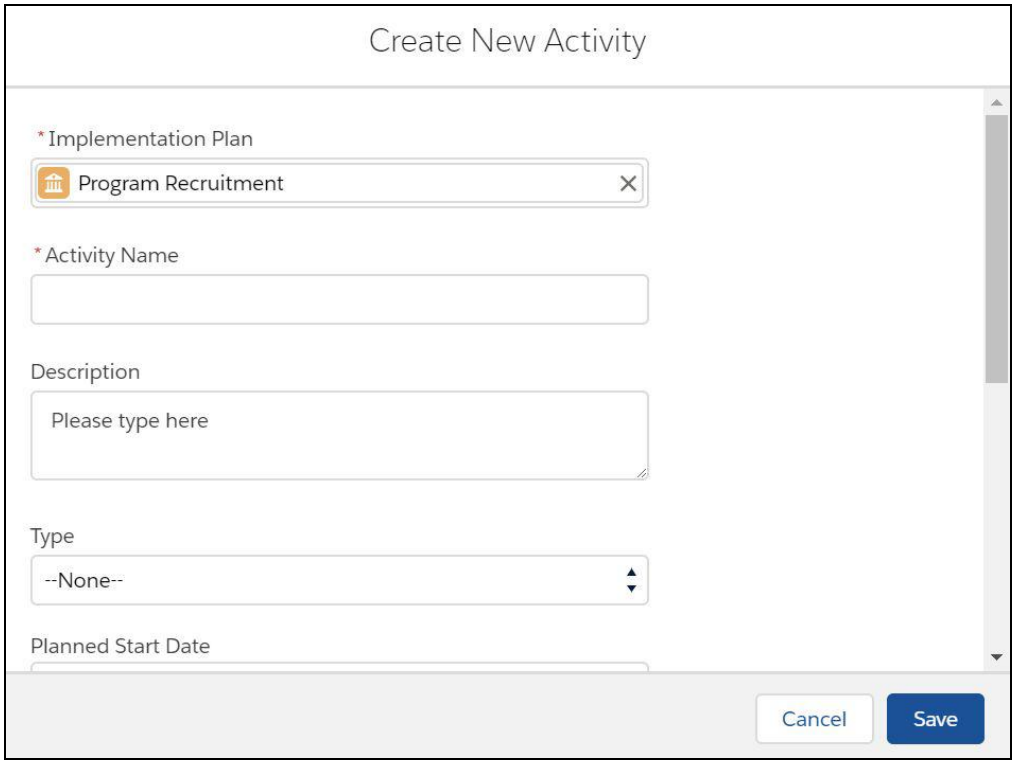
c. If no Implementation Plan has been added to a Project, then the Activity Table will display text to indicate that the User has not created an Implementation Plan and the *Add New Activity* button will be greyed out.

Add Activities to an Implementation Plan

Open the *Activities* tab to view and use the Activity Table. Below the Implementation Plan picklist are search and date filters, underneath which is the Activity Table.

Select an Implementation Plan from the picklist, and click "Add New Activity" to start building out that Implementation Plan. A pop-up will appear so that a new Activity record can be defined and created.

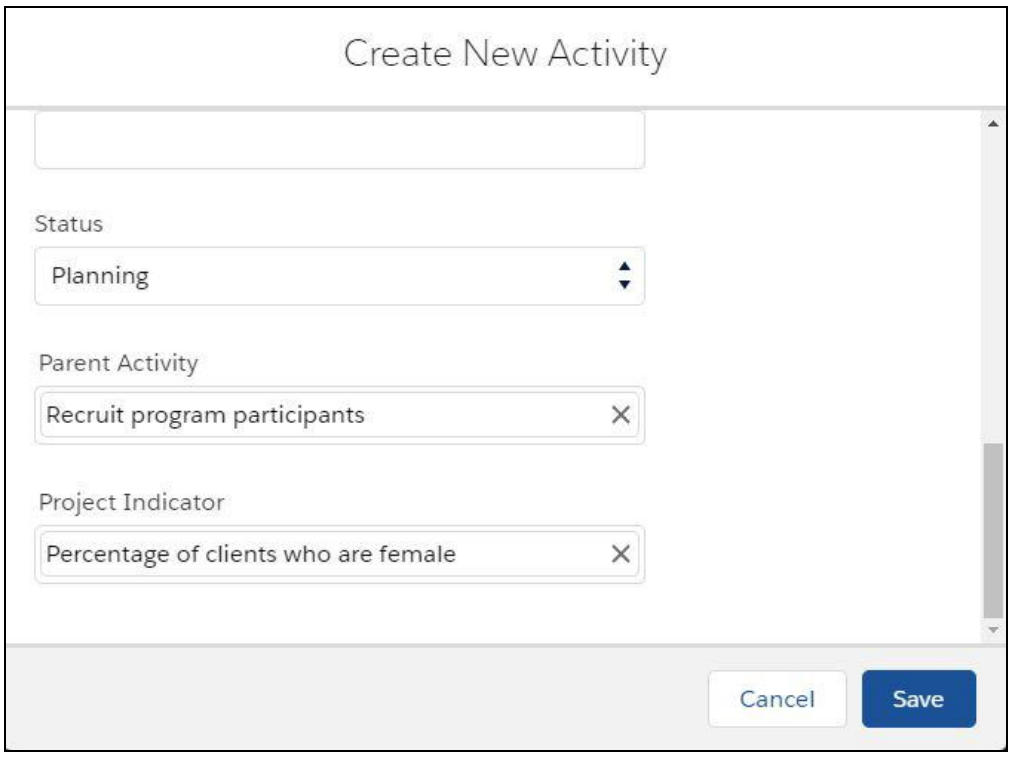
System Administrator Note: The fields in the popup are defined and can be customized using the CREATE_NEW_ACTIVITY_POPUP field set on the Activity__c object. Custom fields added to an Amp Impact object cannot be added to this field set, as they will not display in the popup.



a. Only the Implementation_Plan__c and Name fields are required for the Activity to save successfully.
b. For the Timeline bars of an Activity to display, the date fields must be populated.

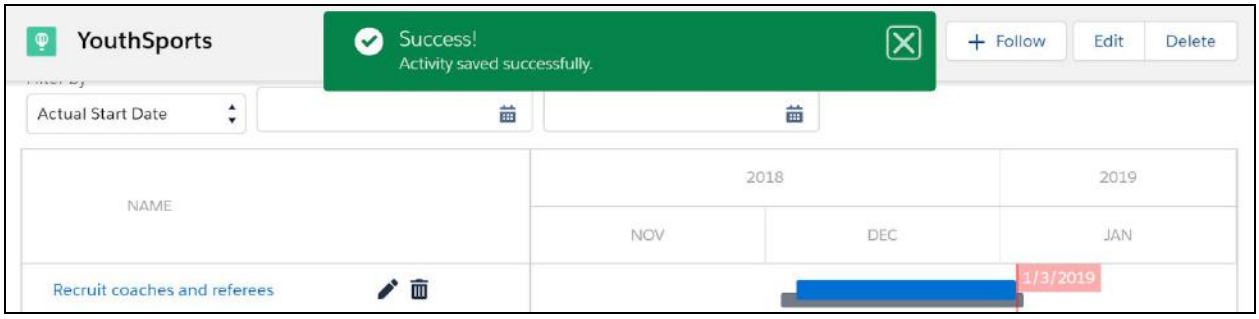
- A full bar spanning the entire timeline of the Activity will be displayed if both the start and end dates are populated.

c. Optionally, Activities can be related to a Project Objective, a Project Indicator, and/or a Contact by filling out the relevant field when creating an Activity.
   - The relevant record (e.g. a Contact record) must be created first before an Activity can be related to that record.
   - Once the relevant record is created, the User can click into the field (e.g. Contact) in the popup and select the record from the picklist that is displayed.



System Administrator Note: To enable users to create this relationship between an Activity and a Project Objective, a Project Indicator, and/or a Contact, add the field(s) to the CREATE_NEW_ACTIVITY_POPUP and EDIT_ACTIVITY_POPUP field sets.

d. When a User saves an Activity, a success message will display.



 Page Performance: 300 Activities (irrespective of level in the hierarchy, i.e. these can be a combination of parent and child Activities) can be added to an Implementation Plan before the page slows (page load, scrolling, resizing the table, etc. are no longer optimized).
 Page Capacity: 6500 Activities can be added to an Implementation Plan before the page breaks.

View Activities in an Implementation Plan

Activity Name

- The first column, cannot be removed or rearranged in the table. It contains the values of Activity__c.Name, which are hyperlinked in blue. Users can click on the Name, and a new tab will open with the Activity Detail page.

- If the Activity Table is viewed in a Salesforce Community, the values in the first column will not be hyperlinked. Users can still modify Activities using the pop-ups in the Lightning Component.

System Administrator Note: The columns in the Activity Table (between the Name column and the Timeline column) are defined and can be customized by the System Administrator using the ACTIVITY_TABLES_COLUMN field set on the Activity__c object. If Activity__c.Status__c is added to the field set, it will always display as the column directly before the Action Icons column, irrespective of its placement in the field set. Custom fields added to an Amp Impact object cannot be added to this field set, as they will not display in the table.

Action Icons

The Action Icons column cannot be removed or rearranged in the table. For each Activity, it contains two clickable icons, a pencil icon for editing that Activity and a trash bin icon for deleting that Activity.

Activity Dates

The following dates can be tracked per Activity:

1. Planned start date
2. Planned end date
3. Actual start date (referred to in this guide as "start date")
4. Actual end date (referred to in this guide as "end date")

Based on these dates, the following formula fields are tracked:

1. Earliest start date - the start date associated with an Activity that happens first - the planned date or the actual date
2. Duration - the number of days tracked for an Activity based on the actual start and end dates.

Timeline Column

The Timeline column cannot be removed or rearranged in the table. The display in this column is controlled by the values in four fields:

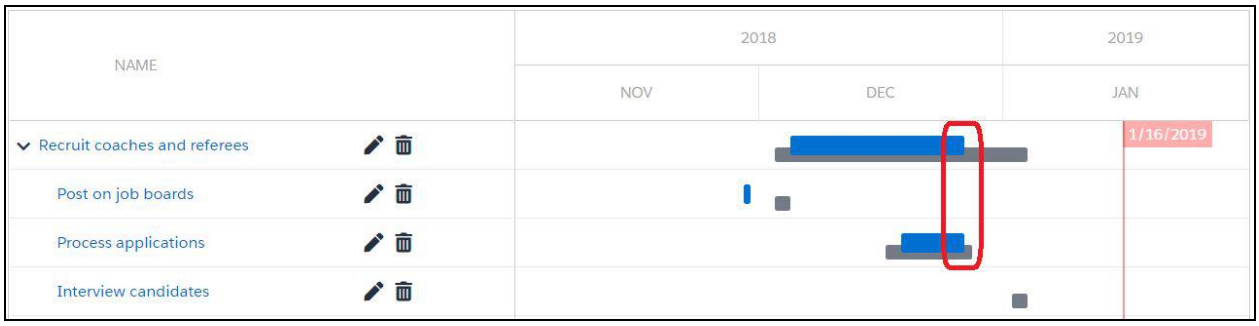
1. Planned_Start_Date__c & Planned_End_Date__c
    - If both of these fields are populated, then a grey bar with one end at the Planned_Start_Date__c point and the other end at the Planned_End_Date__c point will display for the Activity.

2. Actual_Start_Date__c & Actual_End_Date__c

- If only Actual_Start_Date__c is populated, then a tick mark will display in the Timeline to represent the single date value.

- If both of these fields are populated, then a blue bar with one end at the Actual_Start_Date__c point and the other end at the Actual_End_Date__c point will display for the Activity.

- If only Actual_Start_Date__c is populated for a **parent Activity** but the Actual_Start_Date__c *and* Actual_End_Date__c is populated for at least one of its **child Activities**, then the parent Activity's progress bar in the timeline will display from the parent's Actual_Start_Date__c to the most recent Actual_End_Date__c of its child Activities. This reflects that a parent timeline encompasses child Activity timeline(s). Note: this end date will not display in the popover or end date field in Edit Activity popup since the User has not entered this date for the Activity.



3. The Timeline column also contains a vertical bar that marks the Current Date. This date is also pinned at the top of the Activity Table.

Select an Activity

- The User can <u>click</u> on an Activity row, and the row segment with field values will highlight in grey. This highlight will remain until the User either clicks on another Activity row or reloads the page.

- When the User clicks on an Activity with a Timeline that is outside of the current view of the Activity Table, then the Activity Table will re-render so that the selected Activity's Timeline will be displayed, according to its Actual Start Date.
    - For example - if the User is viewing a date in 2018 and then clicks on an Activity with an Actual Start Date that falls in 2019, the Timeline will re-render to display that date in 2019.

- If a User would like to see additional information beyond the displayed columns, the User can <u>hover</u> their cursor over either the Activity detail columns or the timeline bars/tick marks for actual dates to see the Activity Name and date values in a popover. The popover displays in the Timeline, adjacent to the relevant Activity. Any date values that are populated will be displayed in the popover.

For example - if Actual_End_Date__c is the only date field left blank for an Activity in progress, then the popover will display the other three fields.

View Parent and Child Activities

- If an Activity has at least one child Activity, a chevron will display to the left of the parent Activity's Name. By default, the Activity's chevron is pointing downward and the child Activities are displayed.
    - The User can click on the chevron to collapse the child Activities, and the chevron will then point to the right.

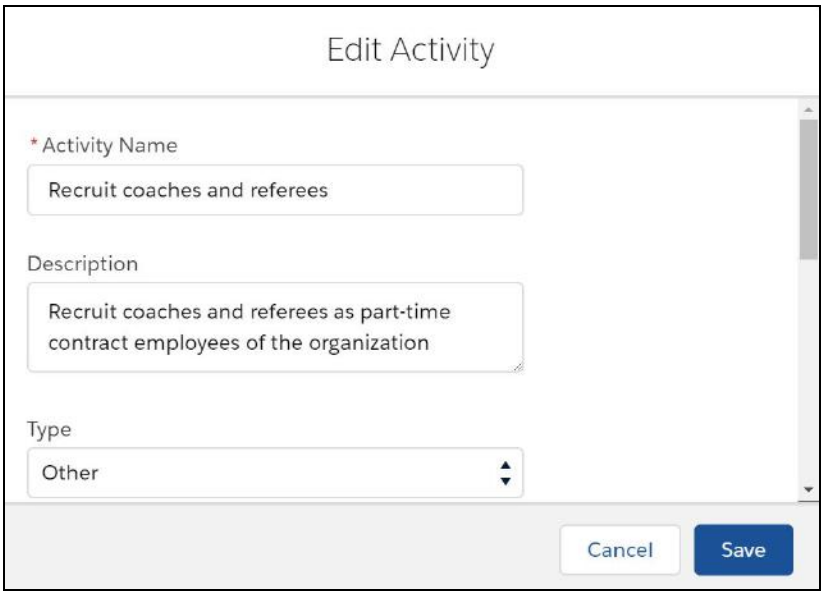
- The User can then click again on the chevron to expand the child Activities, and the chevron will again point downward.

Edit and Track Progress on an Activity

To modify an Activity (for example, update its Status or mark the Actual End Date), the User can click on the pencil icon next to an Activity.

A popup will open in which the User can update any fields on that Activity.

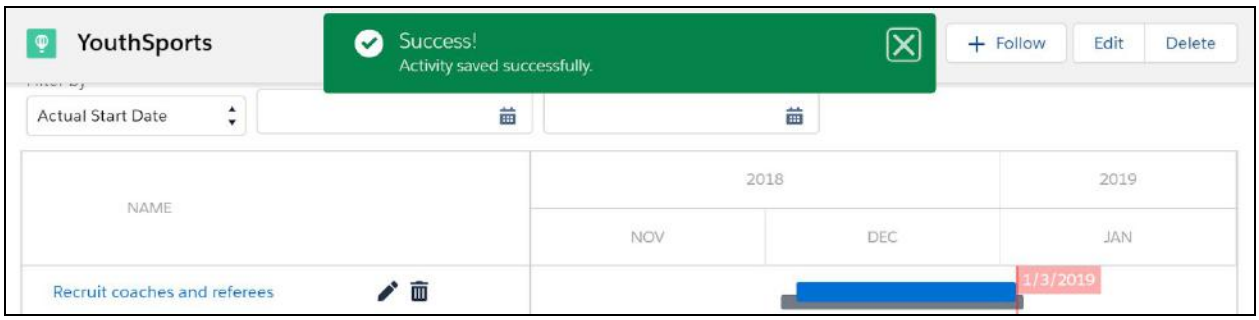
System Administrator Note: The fields in the popup are defined and can be customized using the EDIT_ACTIVITY_POPUP field set on the Activity__c object. Custom fields added to an Amp Impact object cannot be added to this field set, as they will not display in the popup.



a. For the Timeline bars of an Activity to display, the date fields must be populated.
   - If both the start and end date fields - either planned dates or actual dates - are populated, then a full bar spanning the entire timeline of the Activity will be displayed.

- If only one of the planned date fields (i.e. Planned_Start_Date__c **or** Planned_End_Date__c) is populated, then nothing will display for the planned dates.
- If only the start date field (i.e. Actual_Start_Date__c) is populated, then a blue tick mark representing the populated date will be displayed.
- If only the end date field (i.e. Actual_End_Date__c) is populated, then nothing will display in the timeline for the actual dates.

b. When a User saves an Activity, a success message will display.

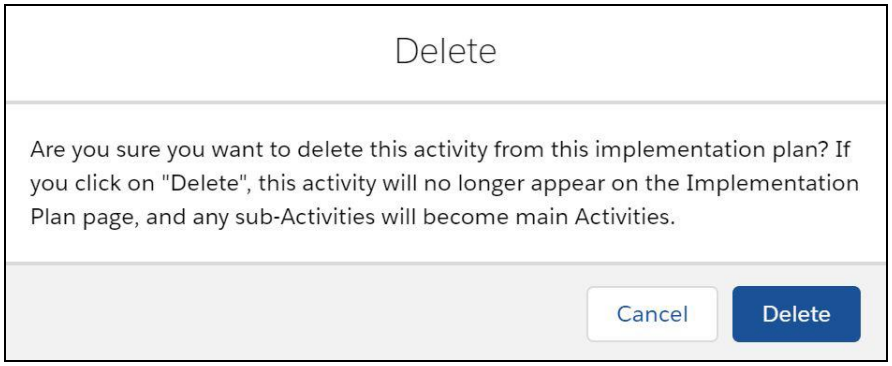


c. The values in the date fields have no impact on the Status__c field (i.e. if the date value of Actual_End_Date__c has already passed, the Status__c will not auto-update to be "Completed"). Automation can be custom built per client requirements to create this field dependency.

Remove an Activity from an Implementation Plan

To remove an Activity from an Implementation Plan, the User can click on the trash icon next to an Activity.

Once the icon has been clicked, a pop-up will appear, requesting that the User confirms the removal of the Activity.



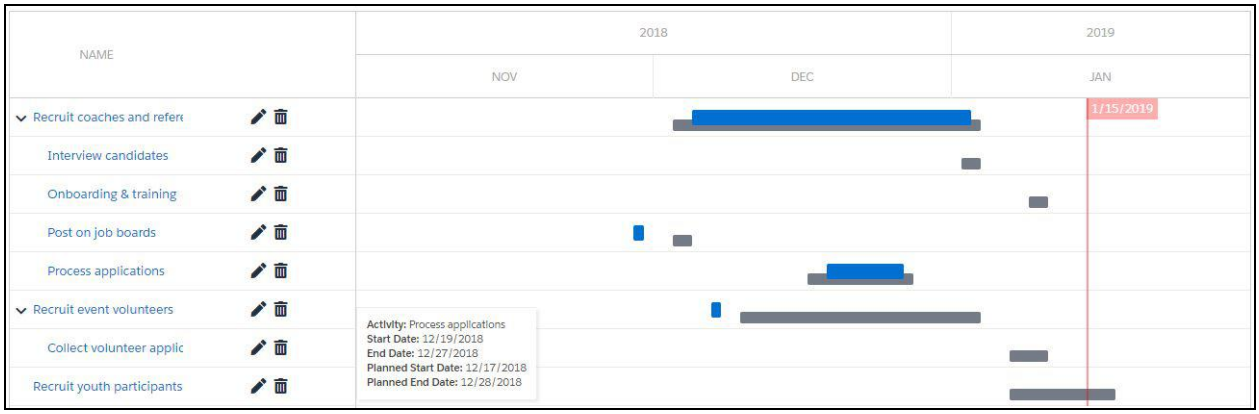
After the User confirms the removal of an Activity, the Activity is deleted, moved to the Recycle Bin, and no longer displayed in the Activity Table. A success message displays to confirm the Activity's deletion.

 If the deleted Activity is a parent Activity, the child Activities are not deleted at the same time as the parent's deletion. After the parent Activity is deleted, the immediate child Activities are displayed as parent-level Activities in the Activity Table. If those child Activities had grandchild Activities before the deletion of the parent, those relationships are preserved (i.e. the grandchild becomes child-level and looks up to the same parent Activity as before).

Sort the Activity Table

Users can click on any of the columns to the right of the Action Icons in the Activity Table to sort the list of Activities.

a. By default, the Activity Table is sorted in ascending order for Earliest_Start_Date__c so that Activities with earlier start dates (either planned or actual) are displayed above Activities with later start dates.
b. The User can click on the Name column to sort the table in alphabetical ascending order based on Name values. If the User clicks on the Name column a second time, the table will sort in alphabetical descending order.



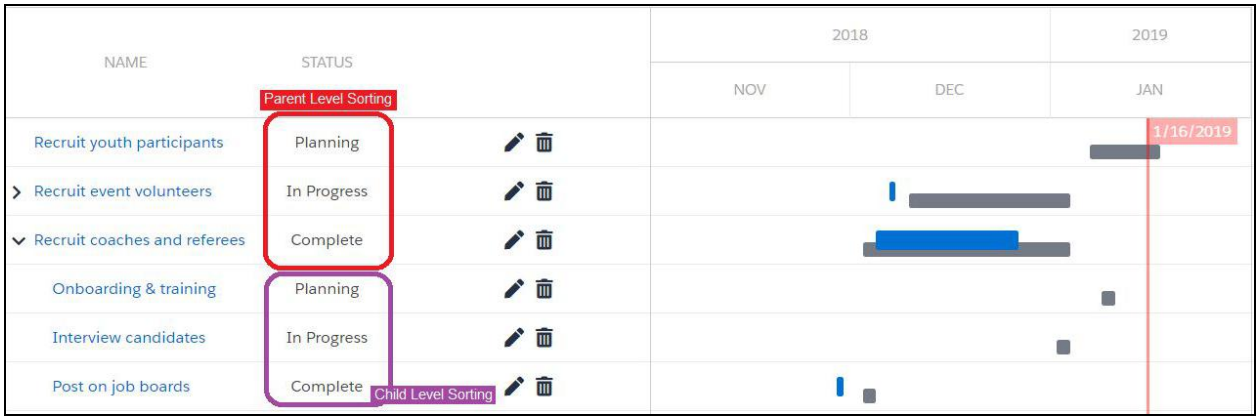
System Administrator Note: The columns in the Activity Table (between the Name column and the Timeline column) are defined and customized using the ACTIVITY_TABLES_COLUMN field set on the Activity__c object. Custom fields added to an Amp Impact object cannot be added to this field set, as they will not display in the table.

c. If Status__c is a displayed in a column, the User can click on the Status header to sort the table in ascending order based on the order of the Activities' progress, as determined by the picklist values (e.g. Planning, In Progress, Complete). If the User clicks on the Status column header a second time, the table will sort in descending order based on the picklist.

System Administrator Note: The Status__c field's picklist values can be added, renamed, and reordered, and the sorting of the column based on Status__c will reflect those updates.
e.g. if you add a "Pending" picklist value between "In Progress" and "Complete", and subsequently sort the Activity Table by Status__c, then the Activities will be sorted as: (1) Planning, (2) In Progress, (3) Pending, and (4) Complete.

d. For any other fields added to the field set, the User can click on the column to sort the table in alphabetical/numeric ascending order based on the field values, depending on the field type. If the User clicks on that column a second time, the table will sort in alphabetical/numeric descending order.

e. Sorting occurs primarily at the parent Activity level. If a parent Activity has multiple child Activities when the table is sorted, then those child Activities continue to be displayed beneath the parent Activity, ordered beneath that parent according to the sorting criteria.



Filter the Display of the Activity Table

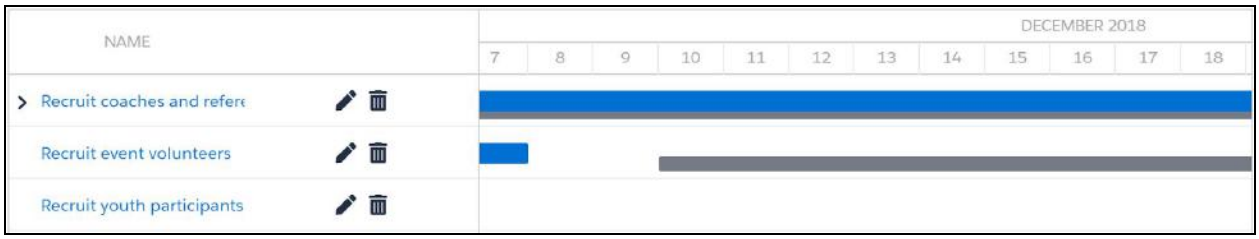
Users can filter the Activity Table to look at Activities, for example, in specific time periods, with a specific Status, and with a specific Activity Type.

Toggle the Time Scale in the Activity Table

Users can toggle the Activity Table view by clicking on the relevant buttons to display the current Year, Month, or Week and any Activities falling within the selected time period.

a. By default, the Activity Table displays in the *Year* view, which displays the Timeline divided into years with month sub-units.

b. When the User clicks *Month* to view the Activity Table, the Activity Table re-renders so that the Timeline is divided into months with date sub-units.



c. When the User clicks *Week* to view the Activity Table, the Activity Table re-renders so that the Timeline is divided into weeks with weekday sub-units.

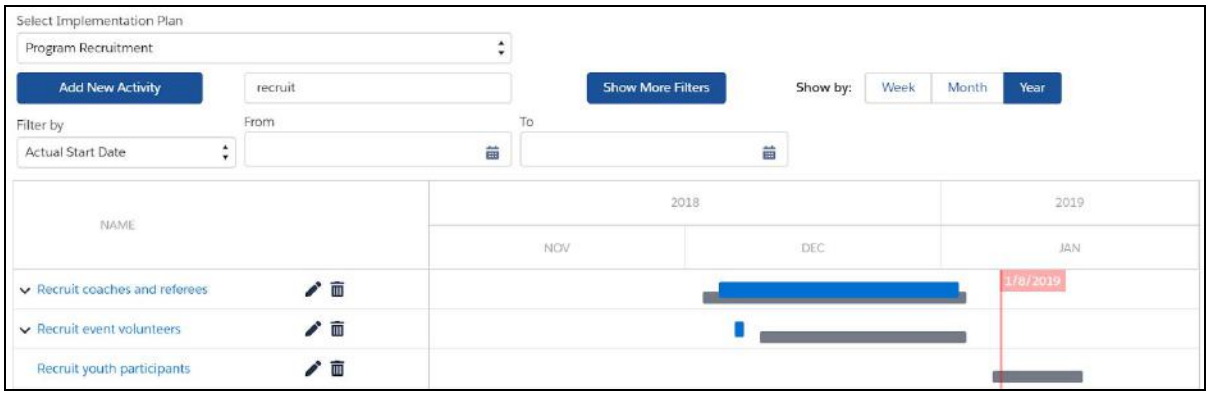
Filter Activities with Matching Text in the Search Bar

Users can also use the type-ahead search bar to filter Activities. If the User types any text into the search bar, the Activity Table will automatically re-render to only display Activities with matching text in their field values.

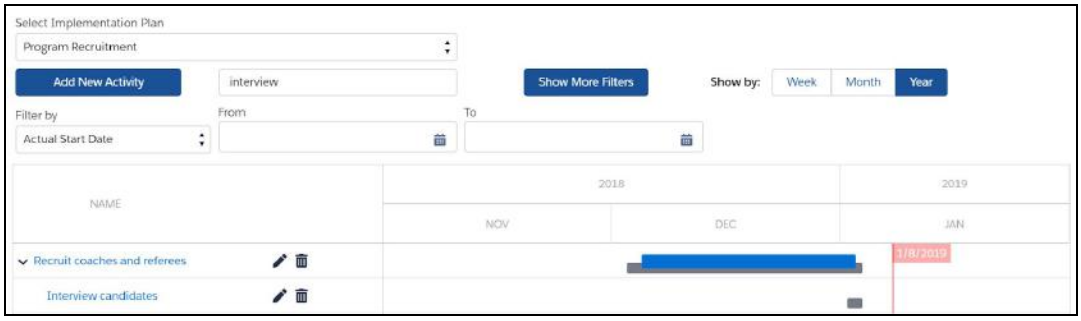
System Administrator Note: The System Administrator can customize which fields are searchable in the type-ahead search bar by adding or removing fields from the ACTIVITY_TABLE_SEARCH_FILTER field set. Custom fields added to an Amp Impact object cannot be added to this field set, or the Advanced Filters will break.

a. If no Activities have field values that match the entered text, then an error message will display above the Activity Table, notifying the user that no activities match the criteria.

b. If the filter matches a **parent** Activity, then only its child Activities that match the criteria are displayed.



c. If the filter matches a **child** Activity, then the parent Activity is also displayed. Any sibling Activities that do not match the criteria are hidden.

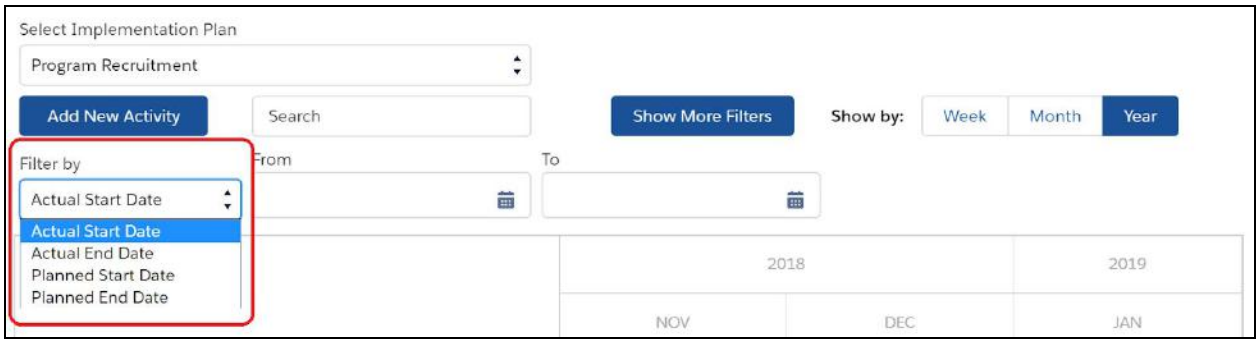


d. To remove this filter, clear out the text entered in the Search Bar and the Activity Table will automatically re-render to display all Activities.

Filter Activities with Specific Start or End Dates

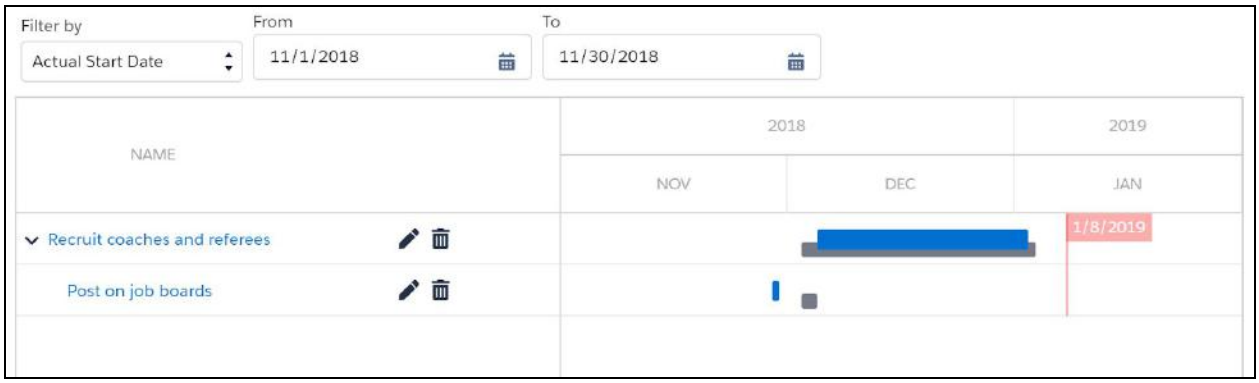
Users can filter the Activity Table based on values in any one of the four date fields.

a. The User first selects which one of the four date fields will be queried in the filter.



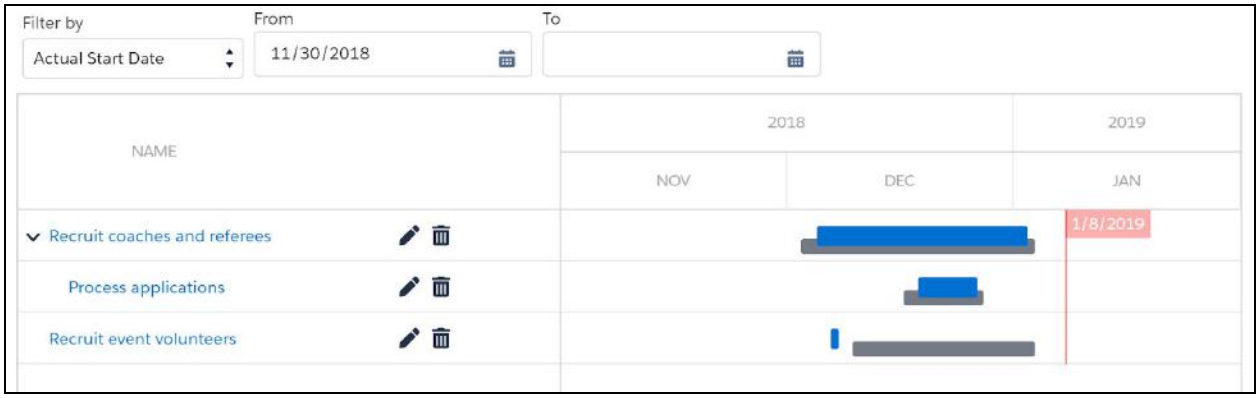
b. The User then sets the criteria for which two dates the selected field value must fall between. The Activity Table will automatically re-render based on the set criteria.

- In the example below, the User is filtering for any Activity with an Actual_Start_Date__c that falls between 1 November 2018 and 30 November 2018. Note that the criteria matches a child Activity so the parent is also displayed.

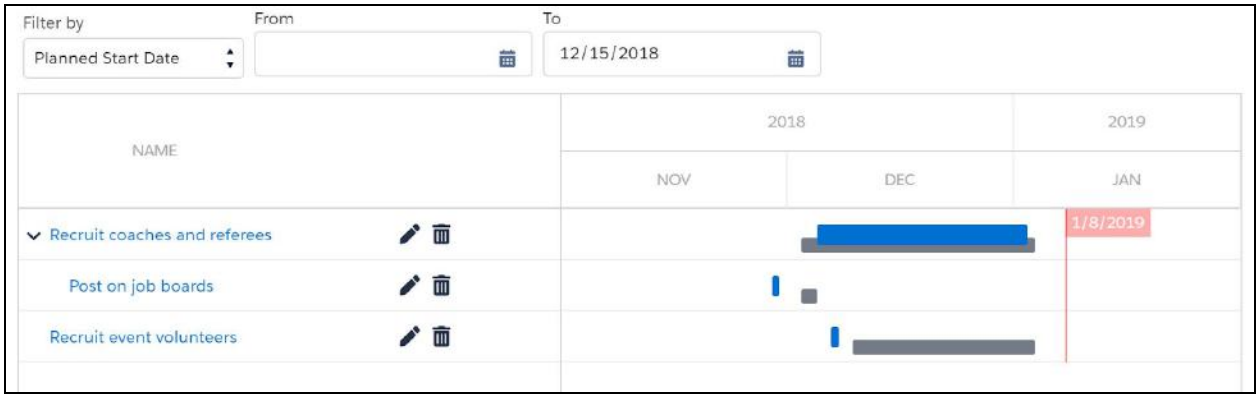


c. The User can also set only one date as a criterion and the Activity Table will filter Activities accordingly.

- If the User only sets the From date, then the Activity Table displays Activities in which the date field value falls on or after the set date.

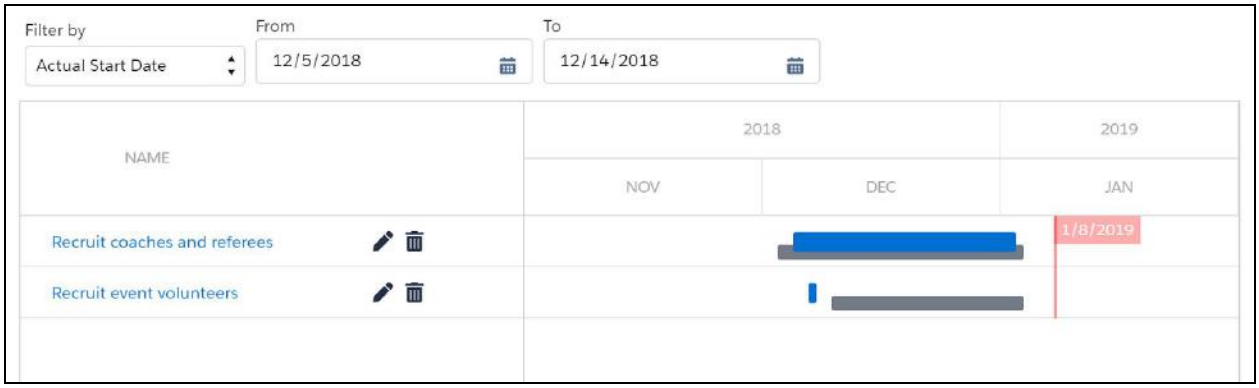


- If the User only sets the To date, then the Activity Table only displays Activities in which the date field values falls on or before the set date.

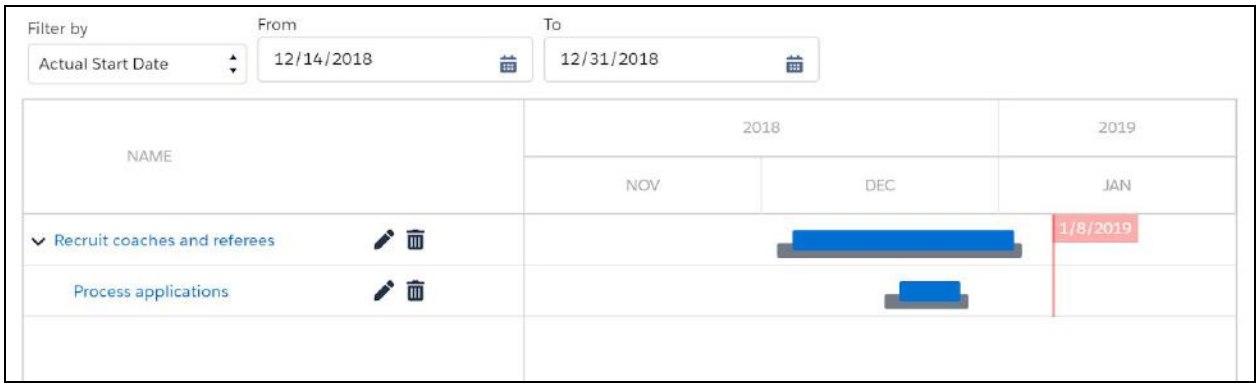


d. If no Activities have field values that match the entered date criteria, then an error message will display above the Activity Table, notifying the user that no activities match the criteria.

e. If the filter matches a **parent** Activity, then only its child Activities that match the criteria are displayed.



f. If the filter matches a **child** Activity, then the parent Activity is also displayed. Any sibling Activities that do not match the criteria are hidden.



g. To <u>remove</u> this filter, clear out the data criteria(s) entered and the Activity Table will automatically re-render to display all Activities.

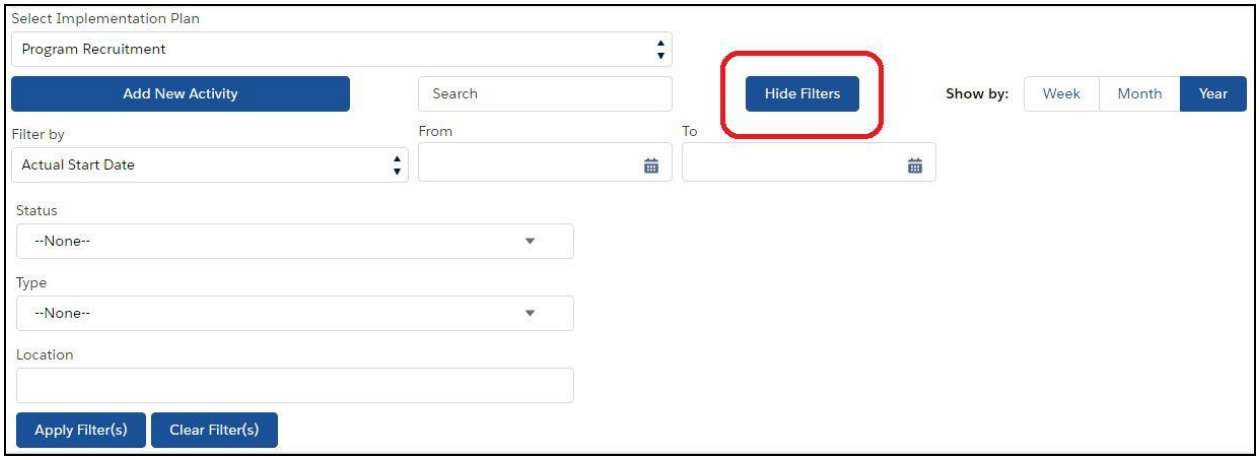
 The **Date filter** cannot be used in conjunction with any of the other filters. If a second filter is applied after the Date filter has been applied, then only Activities matching the second filter criteria will be displayed. Likewise, if a Date filter is applied after another filter has already been applied, then only Activities matching the Date filter criteria will be displayed.

Filter Activities with Advanced Filters

The User can expand the Advanced Filters panel by clicking the *Show More Filters* button next to the type-ahead search box.

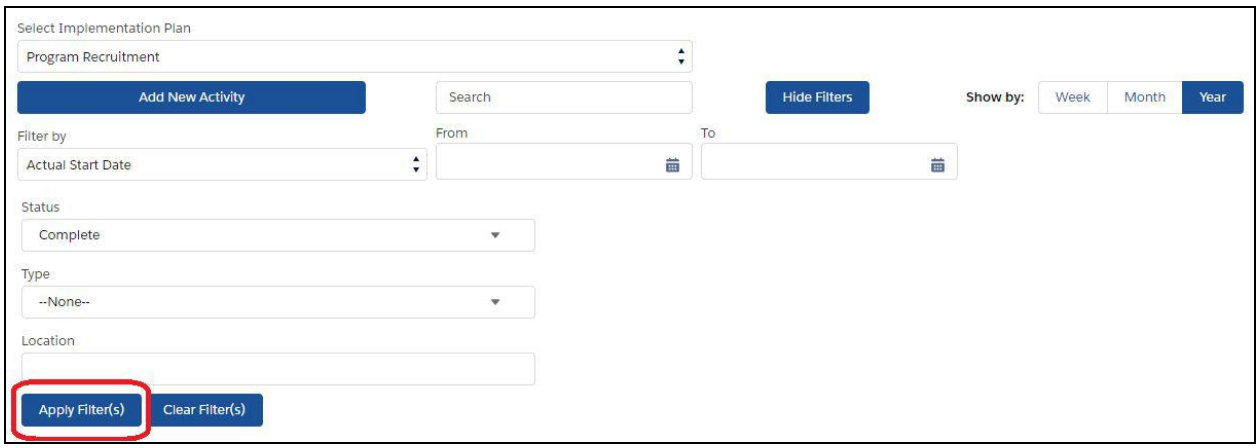
System Administrator Note: The System Administrator can customize which fields are displayed in the Advanced Filters panel by modifying the ACTIVITY_TABLE_SEARCH_FILTER field set. Custom fields added to an Amp Impact object cannot be added to this field set, or the Advanced Filters will break.

a. Once the Advanced Filters panel is expanded, the *Show More Filters* button turns into the *Hide Filters* button. The *Hide Filters* button can be clicked to collapse the Advanced Filters panel.

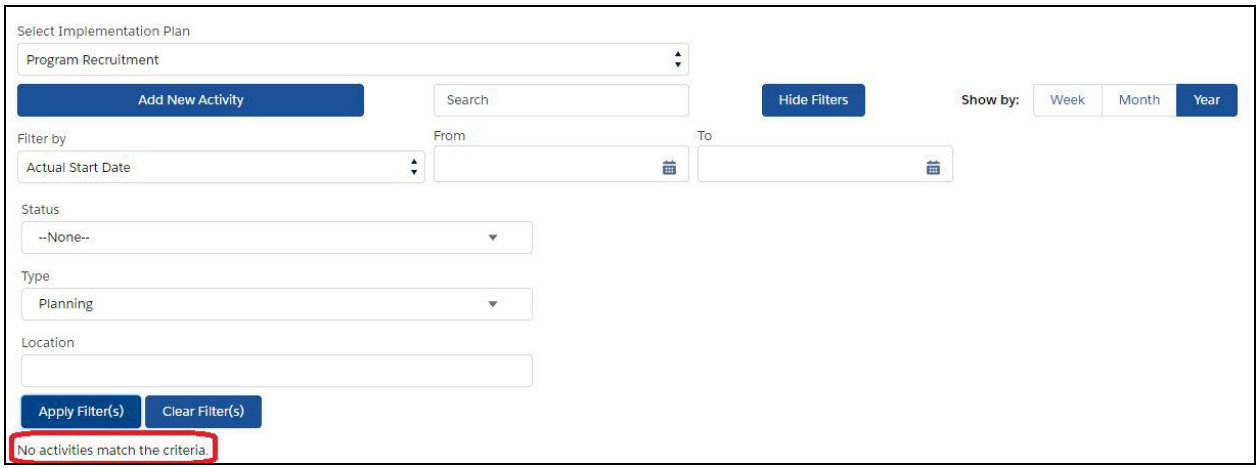


b. The display of the filters depends on the field type:
   - Filters on picklist fields are displayed as multi-select picklists.
   - Filters on relationship (master-detail or lookup) fields are displayed as single-select picklists.
   - Filters on text (text or long text area) fields are displayed as input text fields.

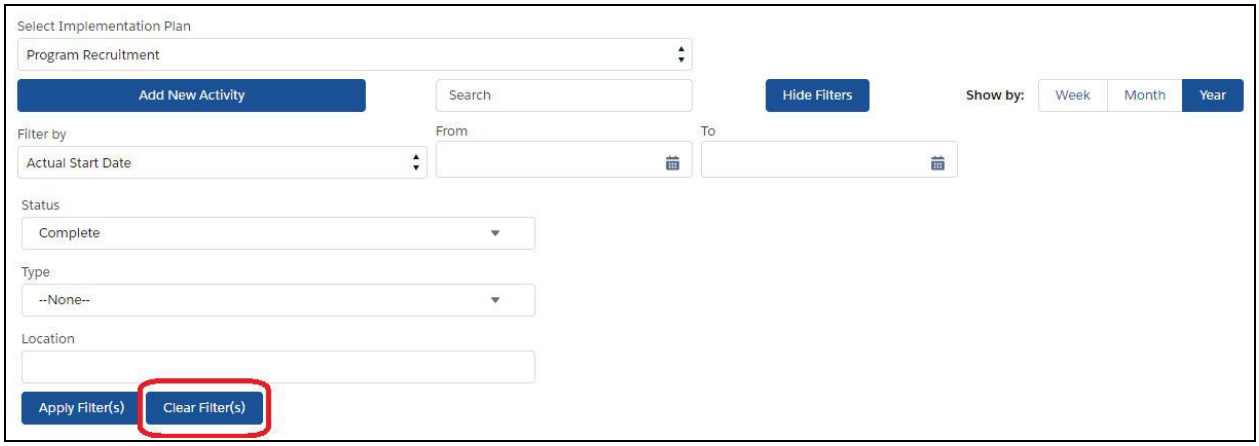
c. Once the criteria is set, the User clicks the *Apply Filter(s)* button, and the Activity Table re-renders to only display Activities that match the criteria.



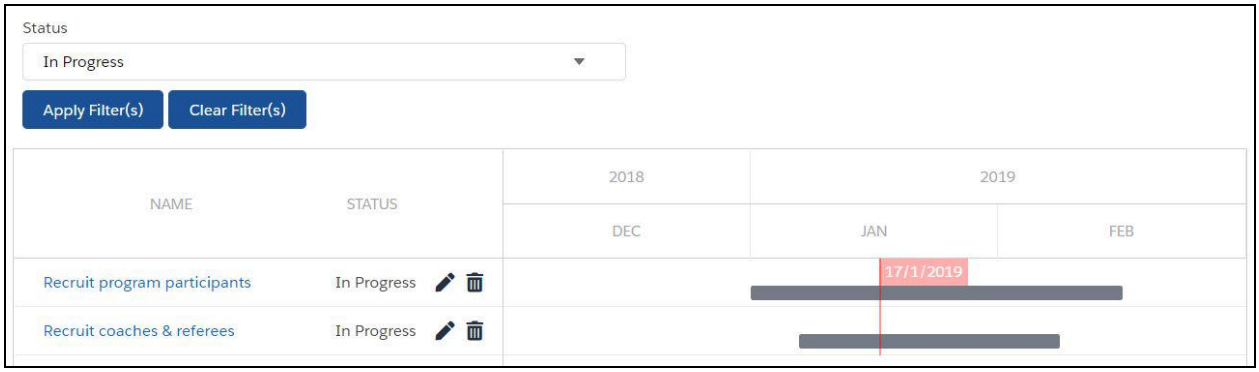
d. If no Activities have field values that match the filter criteria, then an error message will display below the Advanced Filters panel, notifying the user that no activities match the criteria.



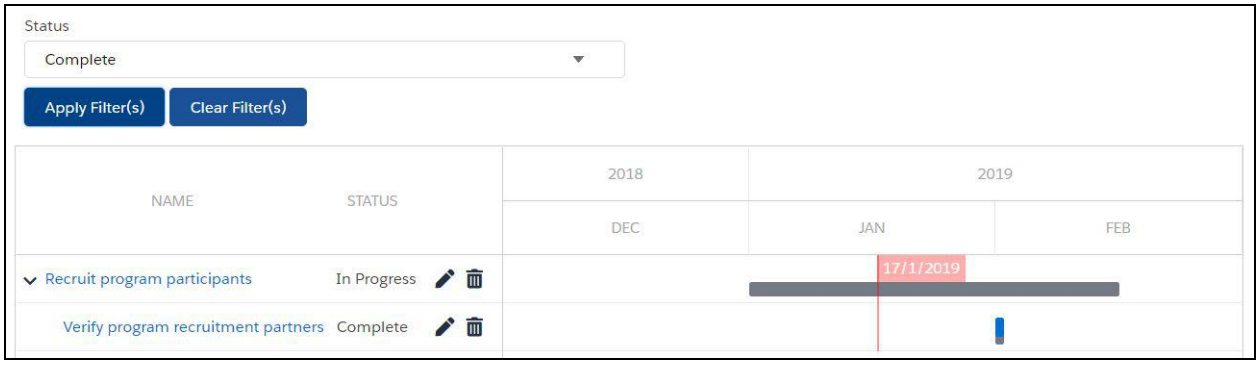
e. To <u>remove</u> this filter, the User can then click the *Clear Filter(s)* button. The criteria in all filters will become blank, and the Activity Table will re-render to display all Activities once more.



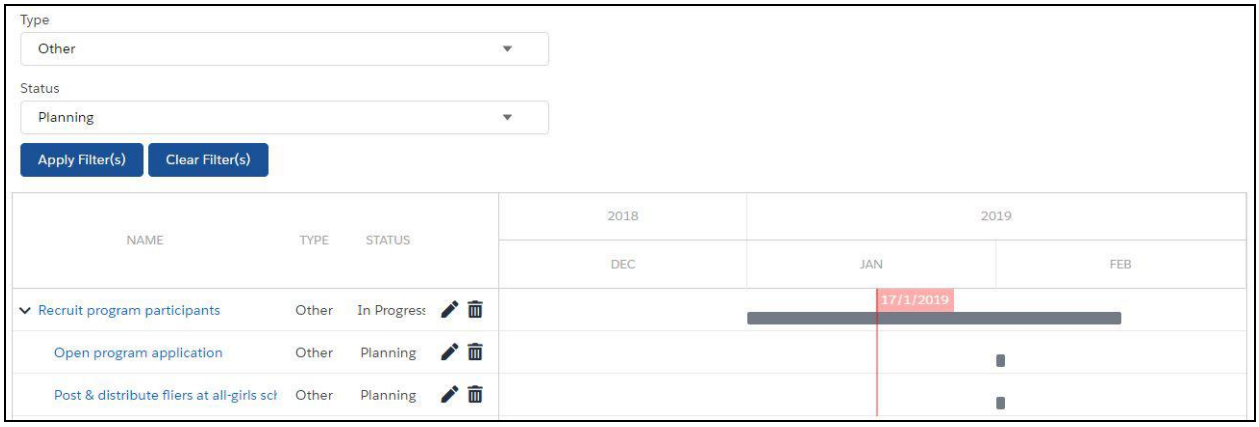
h. If the filter matches a **parent** Activity, then only its child Activities that match the criteria are displayed.



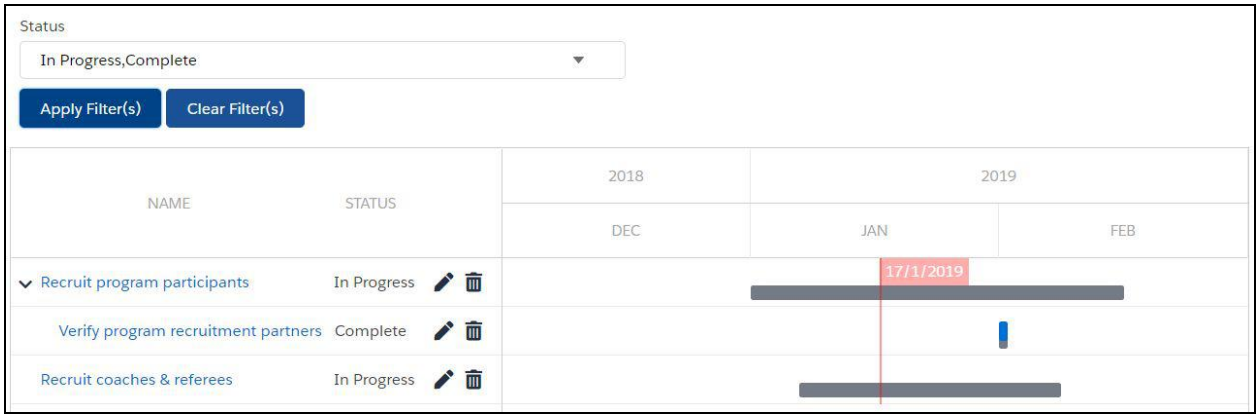
i. If the filter matches a **child** Activity, then the parent Activity is also displayed. Any sibling Activities that do not match the criteria are hidden.



j. If more than one additional filter is created, when the User clicks the *Apply Filters* button, the filtering will use "AND" logic to display Activities that match the criteria.



k. If multiple values are selected in a filter on a picklist field, the filtering will use "OR" logic for that field to display Activities that match the criteria.



Reports and Data Visualization

The following sample reports are included 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. **Activities by Project Objective**

   This is a sample report with Activities grouped by Project Objective, which are then grouped by Implementation Plan. This report indicates progress towards any Objective(s) based on Activities completed as well as which Objective(s) will be achieved by a particular Implementation Plan.

2. **Activities and Financials by Project**

   This is a sample report with Financials summed and grouped by category and by Activities, which are then grouped by Implementation Plan. This report can be used to track the planned and actual expenses related to an Activity for financial budgeting and planning purposes.

3. **Activities by Project Indicator**

   This is a sample report with Activities grouped by Project Indicator, which are then grouped by Implementation Plan. This report shows which Activities are related to which Indicators within an Implementation Plan.

Frequently Asked Questions

While using this feature, users may have some questions about how it works. This section documents some of the frequently asked questions.

Tracking Activity Dates

Q: How will my Planned Date Bar display if I don't have a planned end date?
A: Planned Date Bar does not display if only planned start date is populated.

Q: How will my Activity Timeline display if I enter an end date but no start date?
A: Without a start date, the end date will not be displayed in the timeline. The popover that displays dates will also not display the end date.

Q: What is the Duration value if my Activity starts and end on the same date?
A: The Duration will be 1 (day).

Q: What is the Duration value if my Activity has a start date but no end date?
A: The Duration will be 0.

Selecting and Viewing Information

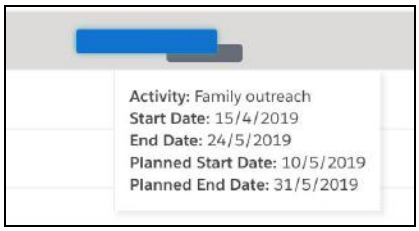
Q: How do I highlight an Activity row?
A: User can either

1. Click on any Activity row and it will be highlighted in grey, even when the user is not hovering their cursor over the row.

Or

2. Hover on any Activity row and it will be highlighted in grey. However, only the segment of the row until the Action Icons will be highlighted; not the Activity Timeline.

Q: How do I view the *Date* popover?



A: *Date* popover displays when:

1) User hovers over the blue bar showing Actual Start and End Dates
2) User hovers over an Activity in the Activity row.
Note: It does not display if User hovers over the grey bar showing Planned Start and End Dates.

Q: Will my Community users also see a hyperlink for the Activity Name to open and view the record?
A: Community users do not see the hyperlink. They can only update and edit the Activity from the *Edit* icon displayed in the Activity Table.

Q: Can I control which column the Status field is displayed in the Activity Table?
A: The Status field will always displays in the Activity Table as the last column before the Action Icons (*Edit*, *Delete*). The order of all the other fields in the ACTIVITY_TABLE_COLUMNS field set can be controlled by the User, except the Status field.

Q: When I click on an Activity row in the Timeline, what happens to the Activity Table display?
A: The Activity Table re-renders to display Activities based on the Actual Start Date values. If an Activity is still in the planning stages, the Actual Start Date is blank. Clicking on an Activity row in the Timeline does not re-render it by the Planned Start Date.

<u>Sorting fields in the Activity Table</u>

Q: How does the Activity Table display if I sort by a field with null (blank) values for some Activities?
A: Activities with null values in the sorted field will display towards the top of the table (depending on the level of hierarchy), as they are considered alphabetically/numerically first in the list.

Q: If I have multiple child Activities for a single parent Activity, and one of the child Activities has a null value (i.e. it is blank) for the field we are sorting by, how will it display? For example, I sort the Activity Table by the Location field, and one child Activity does not have a Location.
A: Sorting occurs primarily at the parent Activity level. If a parent Activity has multiple child Activities when the table is sorted, then those child Activities continue to be displayed beneath the parent Activity, ordered beneath that parent according to the sorting criteria.

In the example provided, the parent Activities will be sorted in alphabetical ascending order based on the value in the Location field. If any of those parent Activities have more than one child Activity, those child Activities are listed below the related parent Activity and sorted in alphabetical ascending order. This means that the child Activity with no Location would be displayed directly beneath the parent Activity, as it is alphabetically first.

Q: The Activity Table default view onLoad is by Date (Earliest_Start_Date__c). How will this display if multiple Activities have the same date value?
A: If multiple Activities have the same value in Earliest_Start_Date__c, then those Activities will be sorted in order of descending CreatedDate value (i.e. the more recently created Activity is displayed by default before the earlier created Activity if they both have the same Earliest_Start_Date__c value).