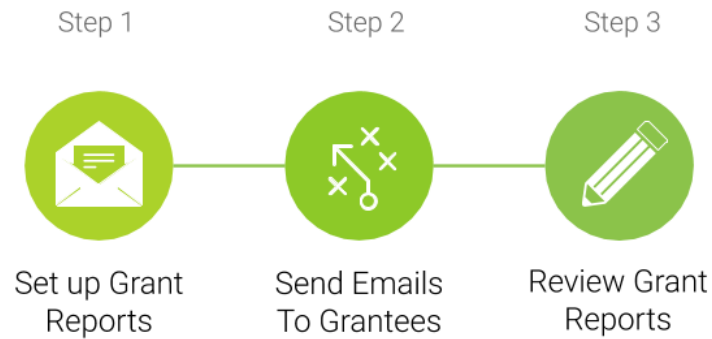


# Funder User Guide: Manage Grant Reports

Version Name: Delphinus | Release Date: August 2020

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## Overview



Funders can manage the grants process with Amp Impact. In this user guide, grantmakers will learn how to do the following:

1. Set up grant reports
2. Customize emails to send to grantees
3. Review grant reports

① To learn about how to set up your community for grantees to provide grant report data, please refer to the Grantee Reporting Setup Guide.

## Set up Grant Reports

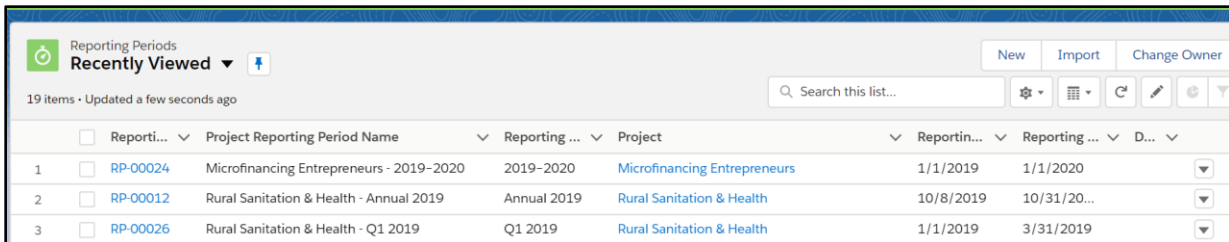
### Create Grant Reporting Periods

A Reporting Period is a period of time during which targets are set, and results are reported within a grant and for each grant indicator, i.e., quarterly or annual.

1. Funders can create grant reports using the Reporting Period object. Ensure that the Reporting Period is associated with a Project object.

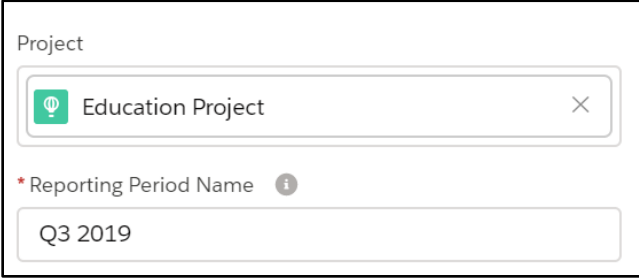
ⓘ Add Results, Performance Graphs, Narrative Reporting and Financials pages will not work if you do not create at least one Reporting Period.

2. To create reporting periods, click the New Reporting Period button from the related list on your Project object, or go to the Reporting Periods object and click New.



	Reporti...	Project Reporting Period Name	Reporting ...	Project	Reportin...	Reporting ...	D...
1	<input type="checkbox"/> RP-00024	Microfinancing Entrepreneurs - 2019-2020	2019-2020	<a href="#">Microfinancing Entrepreneurs</a>	1/1/2019	1/1/2020	▼
2	<input type="checkbox"/> RP-00012	Rural Sanitation & Health - Annual 2019	Annual 2019	<a href="#">Rural Sanitation &amp; Health</a>	10/8/2019	10/31/20...	▼
3	<input type="checkbox"/> RP-00026	Rural Sanitation & Health - Q1 2019	Q1 2019	<a href="#">Rural Sanitation &amp; Health</a>	1/1/2019	3/31/2019	▼

3. Enter a Name for the reporting period.
  - a. This is the name the Grantees will see on the page where they input their Grant Results. Make this name intuitive - i.e. 2018 Biannual - 2.
  - b. Ensure your naming convention is consistent with your organization's standards. For example, are time periods referred to as Q2 2017 or Apr-Jun 2017? Does the fiscal year start in January, April, October? Consistency is important to get the clearest output from the system.



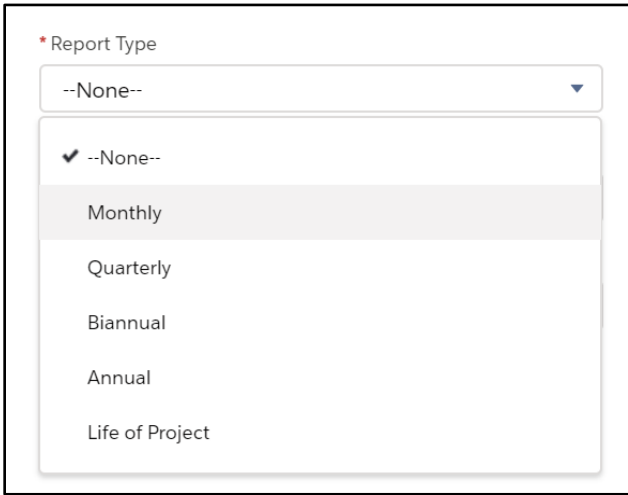
Project

Education Project

\* Reporting Period Name ⓘ

Q3 2019

4. Select the Report Type, from the picklist shown in the screenshot below. This controls which indicators will be reported on in this reporting period.
  - a. If the report type is quarterly, then all indicators with a quarterly reporting frequency will display for this reporting period.
  - b. This is the frequency at which reports will be collected for this Grant.



\* Report Type

--None--

✓ --None--

Monthly

Quarterly

Biannual

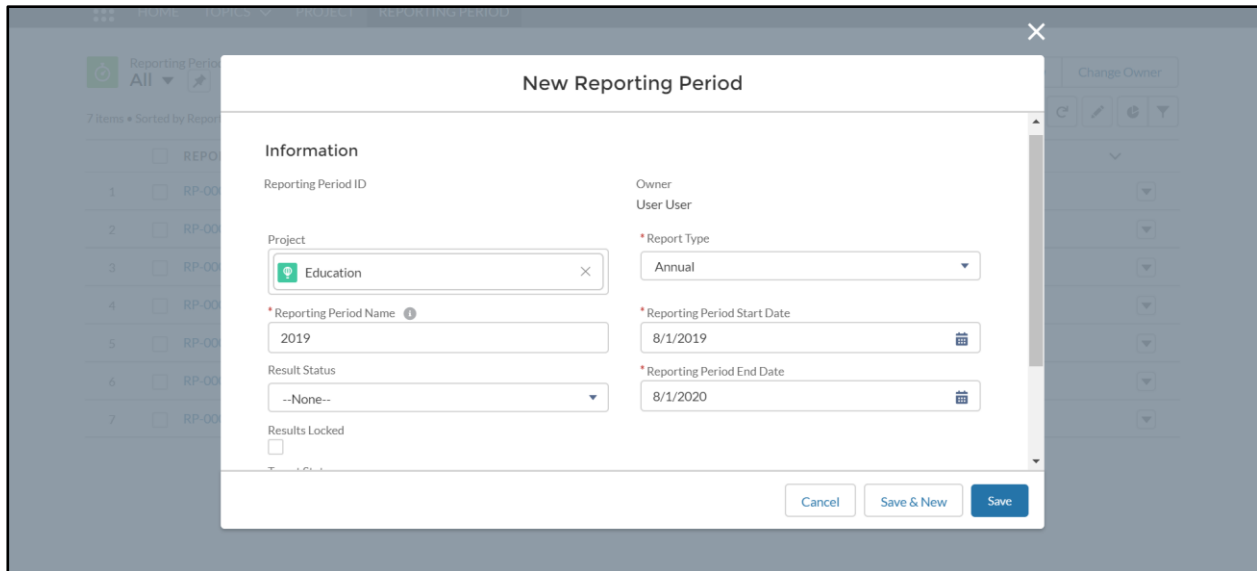
Annual

Life of Project

ⓘ The report type frequency **must** match the Reporting Frequency on at least one Indicator in order for the Indicator to appear on the Set Targets/Add Results pages for the Grantee.

5. Reporting Period Start Date: Enter the start date for this reporting period.
6. Reporting Period End Date: Enter the end date for this reporting period.

7. Result Status: This will default to “Scheduled” to indicate the Reporting Period has been set up, but is not actively reporting yet.



8. Click *Save and New* to create other Reporting Periods for this project or *Save* to finish creating reporting periods.

## Invite Grantees to Report via Email

System admins have configured an email alert to send to grantees the link of a grant report according to the start and end dates. Email alerts are emails generated by an automated process and sent to designated grantees.

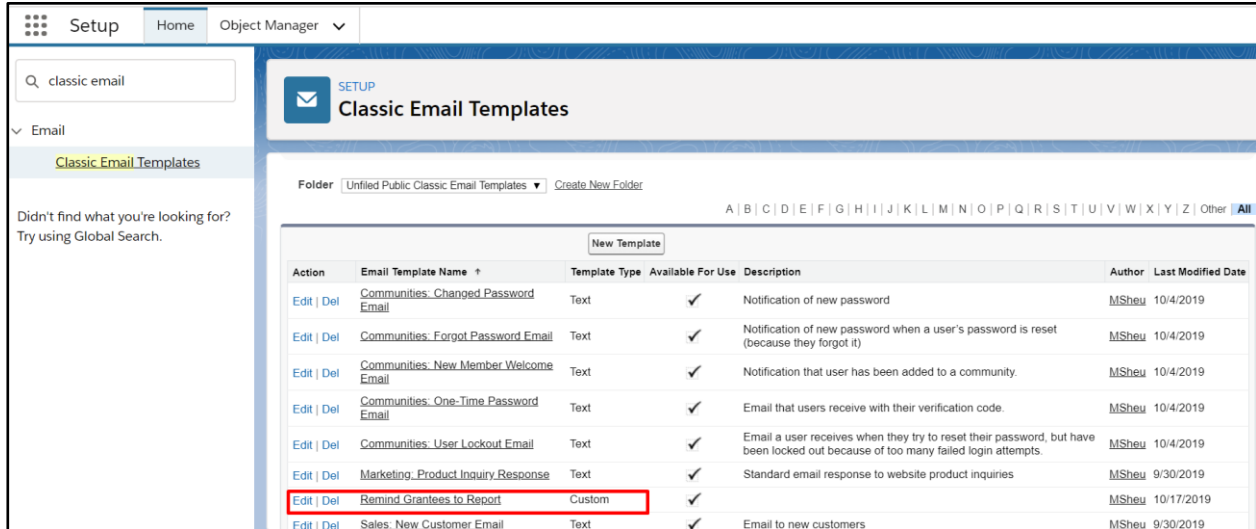
**i** To learn about setting up email alerts, please refer to the *Grantee Reporting Setup Guide*.

## Customize Email Template

System admins are provided an email template from the *Grantee Reporting Setup* guide, which can be customized to best suit the organization’s needs.

1. Navigate to Setup and use the Quick Find search for Classic Email Templates.

2. Locate the preexisting custom template.

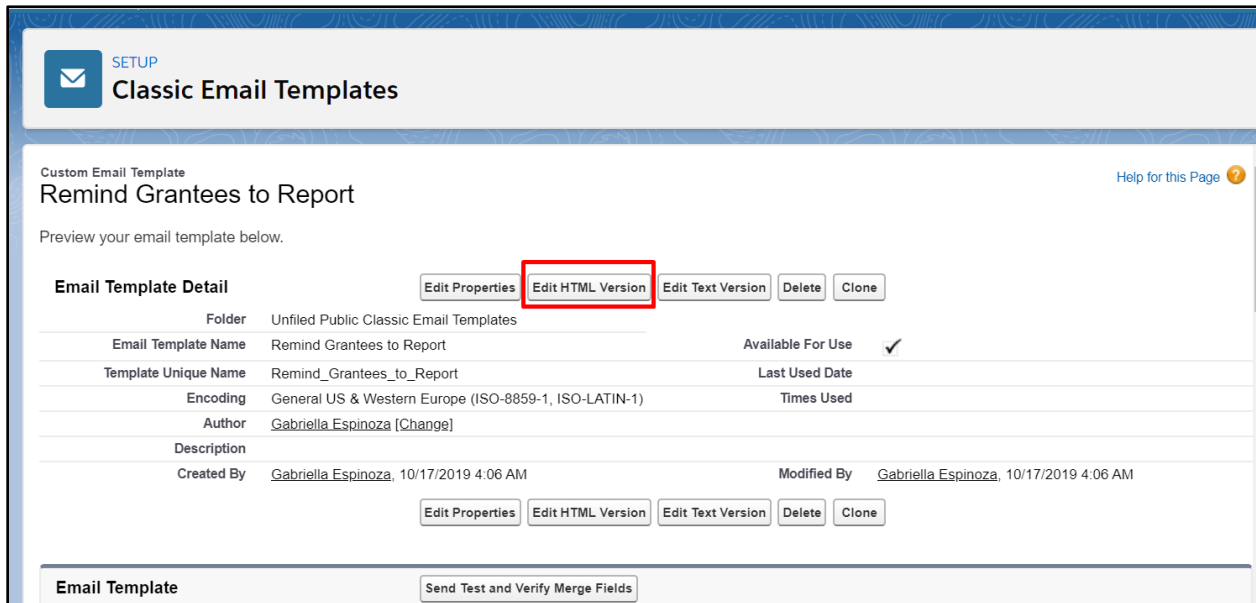


The screenshot displays the 'Classic Email Templates' management interface. A search bar at the top left contains the text 'classic email'. The left sidebar shows a navigation menu with 'Email' expanded and 'Classic Email Templates' selected. The main content area shows a table of templates. The 'Remind Grantees to Report' template is highlighted with a red box.

Action	Email Template Name ↑	Template Type	Available For Use	Description	Author	Last Modified Date
<a href="#">Edit</a>   <a href="#">Del</a>	Communities: Changed Password Email	Text	✓	Notification of new password	MSheu	10/4/2019
<a href="#">Edit</a>   <a href="#">Del</a>	Communities: Forgot Password Email	Text	✓	Notification of new password when a user's password is reset (because they forgot it)	MSheu	10/4/2019
<a href="#">Edit</a>   <a href="#">Del</a>	Communities: New Member Welcome Email	Text	✓	Notification that user has been added to a community.	MSheu	10/4/2019
<a href="#">Edit</a>   <a href="#">Del</a>	Communities: One-Time Password Email	Text	✓	Email that users receive with their verification code.	MSheu	10/4/2019
<a href="#">Edit</a>   <a href="#">Del</a>	Communities: User Lockout Email	Text	✓	Email a user receives when they try to reset their password, but have been locked out because of too many failed login attempts.	MSheu	10/4/2019
<a href="#">Edit</a>   <a href="#">Del</a>	Marketing: Product Inquiry Response	Text	✓	Standard email response to website product inquiries	MSheu	9/30/2019
<a href="#">Edit</a>   <a href="#">Del</a>	Remind Grantees to Report	Custom	✓		MSheu	10/17/2019
<a href="#">Edit</a>   <a href="#">Del</a>	Sales: New Customer Email	Text	✓	Email to new customers	MSheu	9/30/2019

① “Remind Grantees to Report” is the suggested Email Template Name provided in the Setup Guide. The naming conventions of each organization may differ.

3. Click the Edit HTML Version button, as shown below, to edit the HTML version.



SETUP  
Classic Email Templates

Custom Email Template  
Remind Grantees to Report [Help for this Page](#)

Preview your email template below.

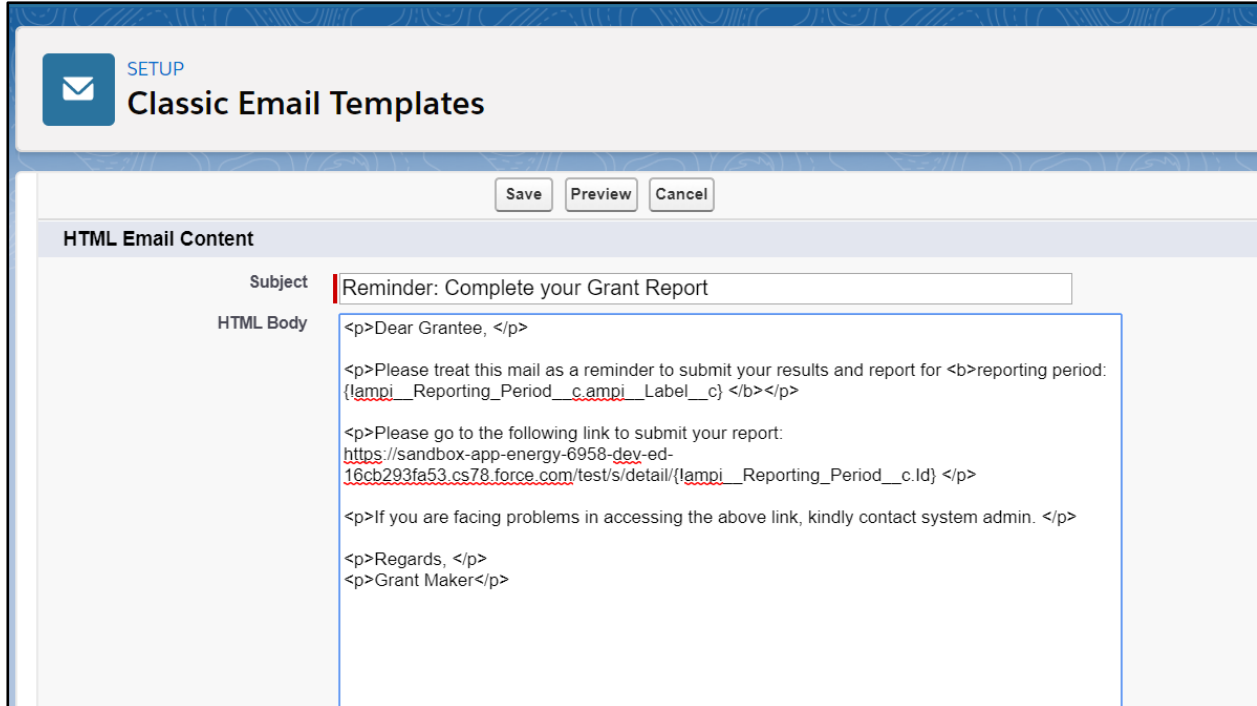
**Email Template Detail** [Edit Properties](#) [Edit HTML Version](#) [Edit Text Version](#) [Delete](#) [Clone](#)

Folder	Unfiled Public Classic Email Templates	
Email Template Name	Remind Grantees to Report	Available For Use <input checked="" type="checkbox"/>
Template Unique Name	Remind_Grantees_to_Report	Last Used Date
Encoding	General US & Western Europe (ISO-8859-1, ISO-LATIN-1)	Times Used
Author	<a href="#">Gabriella Espinoza</a> <a href="#">[Change]</a>	
Description		
Created By	<a href="#">Gabriella Espinoza</a> , 10/17/2019 4:06 AM	Modified By <a href="#">Gabriella Espinoza</a> , 10/17/2019 4:06 AM

[Edit Properties](#) [Edit HTML Version](#) [Edit Text Version](#) [Delete](#) [Clone](#)

**Email Template** [Send Test and Verify Merge Fields](#)

4. In the HTML Body, make the desired changes.
  - a. Click Preview before saving if desired to ensure proper formatting and display.
  - b. See screenshot below.



SETUP

## Classic Email Templates

Save Preview Cancel

HTML Email Content

Subject

HTML Body 

```
<p>Dear Grantee, </p>

<p>Please treat this mail as a reminder to submit your results and report for <b>reporting period:
{!ampi__Reporting_Period__c.ampi__Label__c} </b></p>

<p>Please go to the following link to submit your report:
https://sandbox-app-energy-6958-dev-ed-16cb293fa53.cs78.force.com/test/s/detail/{!ampi\_\_Reporting\_Period\_\_c.Id} </p>

<p>If you are facing problems in accessing the above link, kindly contact system admin. </p>

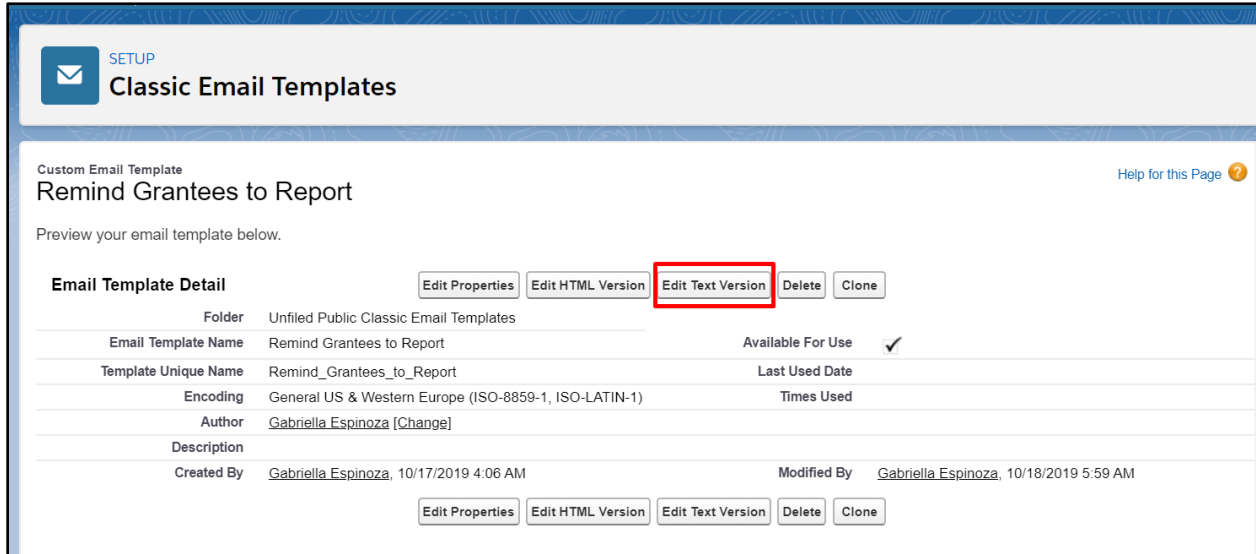
<p>Regards, </p>
<p>Grant Maker</p>
```

5. Click Save.

ⓘ To ensure consistency, any changes to the email template in the HTML Version should be reflected in the Text Version as well.

6. Click Edit Text Version, shown below.





**Classic Email Templates**

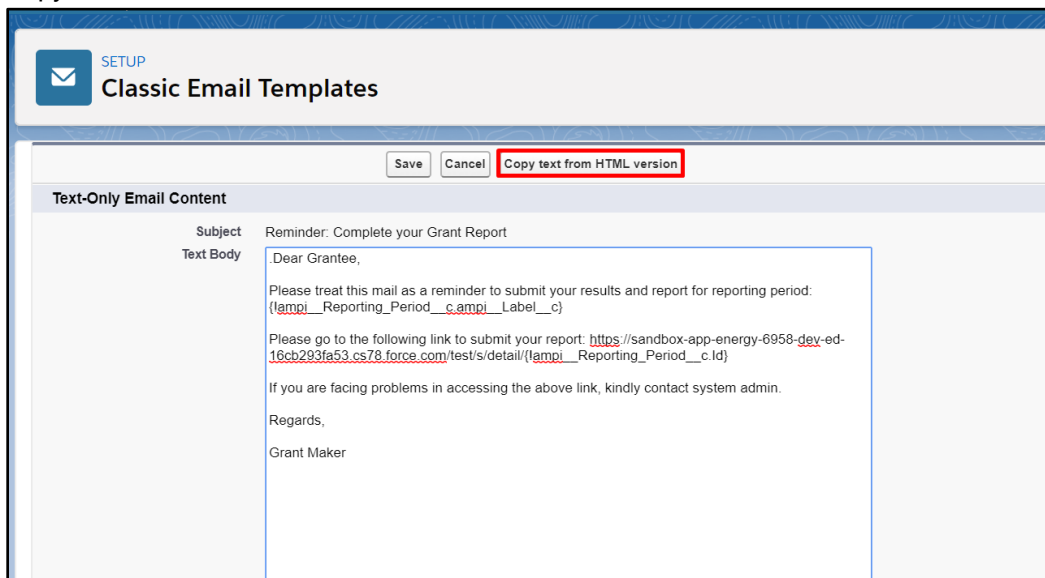
Custom Email Template: **Remind Grantees to Report** [Help for this Page](#)

Preview your email template below.

**Email Template Detail**

Folder	Unfiled Public Classic Email Templates	
Email Template Name	Remind Grantees to Report	Available For Use <input checked="" type="checkbox"/>
Template Unique Name	Remind_Grantees_to_Report	Last Used Date
Encoding	General US & Western Europe (ISO-8859-1, ISO-LATIN-1)	Times Used
Author	<a href="#">Gabriella Espinoza</a> [Change]	
Description		
Created By	<a href="#">Gabriella Espinoza</a> , 10/17/2019 4:06 AM	Modified By <a href="#">Gabriella Espinoza</a> , 10/18/2019 5:59 AM

7. Include the same adjustments from the edited HTML Version to the Text Version by clicking the Copy text from HTML Version button. See below for screenshot.



**Classic Email Templates**

**Text-Only Email Content**

Subject: Reminder: Complete your Grant Report

Text Body:

.Dear Grantee,

Please treat this mail as a reminder to submit your results and report for reporting period: {lampi\_Reporting\_Period\_c\_ampi\_Label\_c}

Please go to the following link to submit your report: [https://sandbox-app-energy-6958-dev-ed-16cb293fa53.cs78.force.com/test/s/detail/{lampi\\_Reporting\\_Period\\_c.Id}](https://sandbox-app-energy-6958-dev-ed-16cb293fa53.cs78.force.com/test/s/detail/{lampi_Reporting_Period_c.Id})

If you are facing problems in accessing the above link, kindly contact system admin.

Regards,

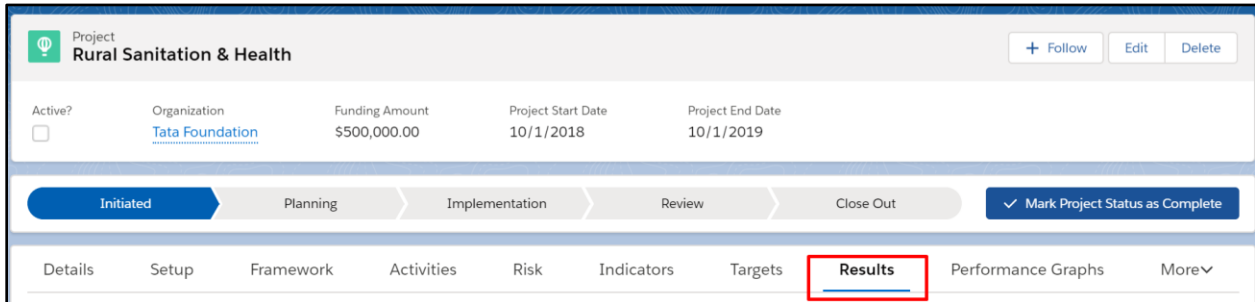
Grant Maker

8. Click Save.

## Review a Grant Report - Indicator Results

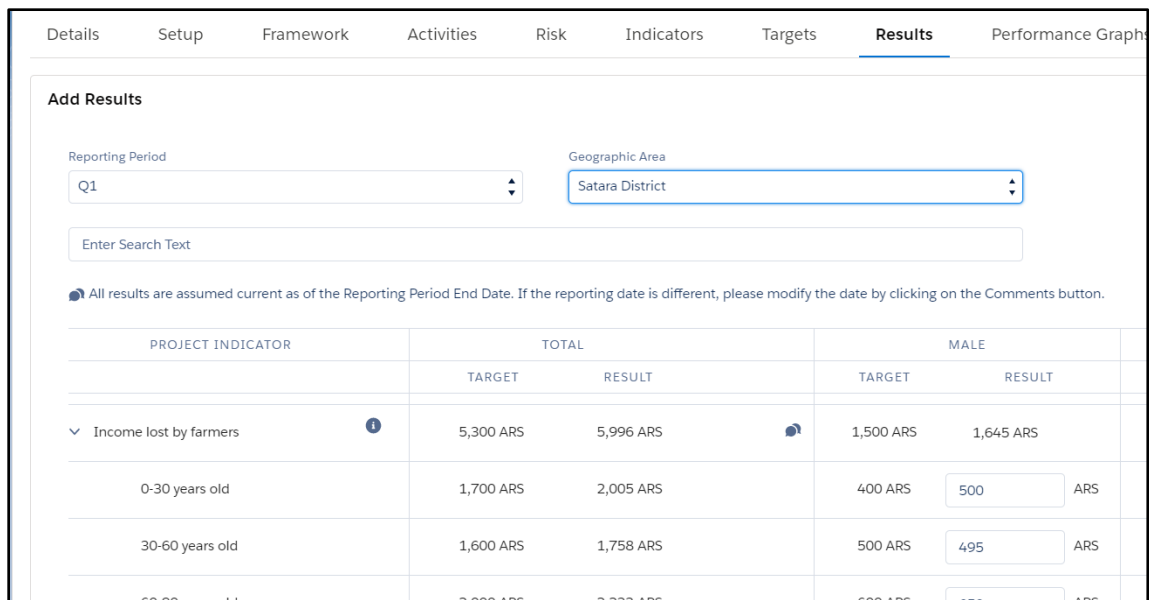
### Review Results per Reporting Period

1. Within a specific grant, navigate to the Results tab.



The screenshot shows the project dashboard for 'Rural Sanitation & Health'. At the top, there are buttons for '+ Follow', 'Edit', and 'Delete'. Below this, project details are listed: Active? (checkbox), Organization (Tata Foundation), Funding Amount (\$500,000.00), Project Start Date (10/1/2018), and Project End Date (10/1/2019). A progress bar shows stages: Initiated (active), Planning, Implementation, Review, and Close Out. A 'Mark Project Status as Complete' button is on the right. At the bottom, a navigation menu includes: Details, Setup, Framework, Activities, Risk, Indicators, Targets, **Results** (highlighted with a red box), Performance Graphs, and More.

2. View project indicator results and compare targets versus actuals.



The screenshot shows the 'Results' tab. At the top, the navigation menu is repeated, with 'Results' underlined. Below the menu, there is an 'Add Results' section with two dropdown menus: 'Reporting Period' (set to Q1) and 'Geographic Area' (set to Satara District). Below these is a search box labeled 'Enter Search Text'. A note states: 'All results are assumed current as of the Reporting Period End Date. If the reporting date is different, please modify the date by clicking on the Comments button.' Below the note is a table with the following data:



PROJECT INDICATOR	TOTAL		MALE	
	TARGET	RESULT	TARGET	RESULT
Income lost by farmers	5,300 ARS	5,996 ARS	1,500 ARS	1,645 ARS
0-30 years old	1,700 ARS	2,005 ARS	400 ARS	500 ARS
30-60 years old	1,600 ARS	1,758 ARS	500 ARS	495 ARS
60-99 years old	2,000 ARS	2,233 ARS	600 ARS	550 ARS

3. If Indicator Performance Stoplights are enabled and the fields Aim, % Threshold Between Red and Yellow, and % Threshold Between Yellow and Green are populated on Project Indicators, then the results table will display stoplight icons to calculate results performance compared to targets.
  - a. If the calculation is greater than or equal to Threshold Between Yellow and Green, a **green** stoplight icon is displayed.
  - b. If the calculated value is less than the Threshold Between Yellow and Green but greater than or equal to Threshold Between Red and Yellow, a **yellow** stoplight icon is displayed.
  - c. If the calculated value is less than the Threshold Between Red and Yellow, a **red** stoplight icon is displayed.
  - d. See screenshot below.

PROJECT INDICATOR	TOTAL			
	TARGET	RESULT		
> Amount deposited by Area Type <span style="float: right;">i</span>	533	310	!	<span style="float: right;">🗨️</span>
Amount deposited into savings accounts <span style="float: right;">i</span>	225,500 KES	<input type="text" value="290,000"/> KES	✔️	<span style="float: right;">🗨️</span>
> Assessments given <span style="float: right;">i</span>	2,590	1,085	✖️	<span style="float: right;">🗨️</span>


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

4. Hover over the information icon to the right of each project indicator to view the information that was available to a grantee while they were reporting.
5. On hover, information about the indicator is displayed for informational and guidance purposes, as shown below.



PROJECT INDICATOR		TOTAL
Increase English scores		55
Increase in French scores		90
Increase in Hindi scores		100

**Indicator Information**

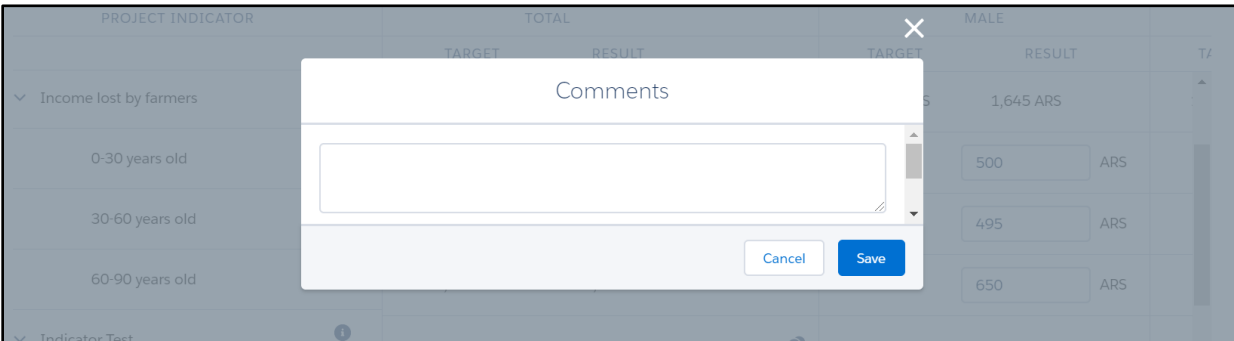
Objective(s):  
 Guideline: Track the testing scores for English as a second language

 The fields in the Info icon are controlled by a field set on the Project Indicator record. Contact a system admin to learn more.

6. Funders may also view comments by clicking on the icon to the right of the results, shown below.

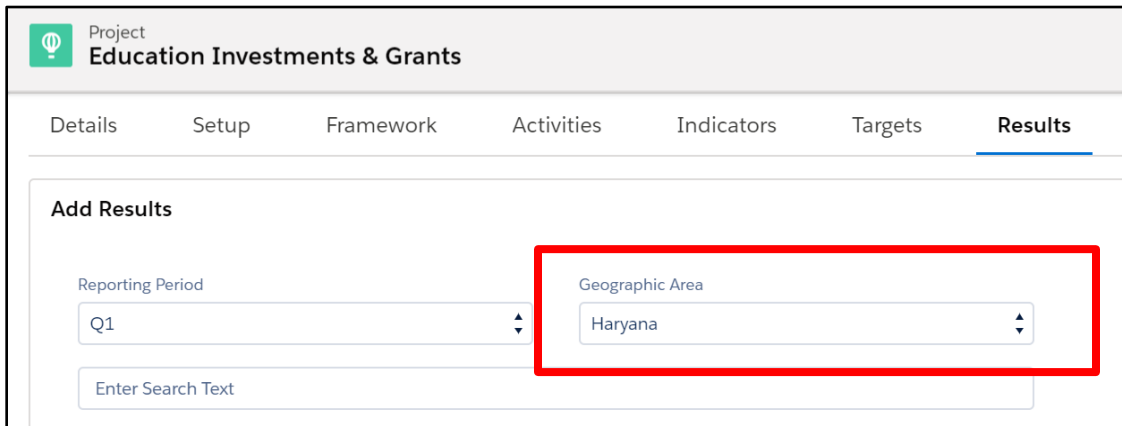
PROJECT INDICATOR	TOTAL		
	TARGET	RESULT	
✓ Income lost by farmers 	5,300 ARS	5,996 ARS	
0-30 years old	1,700 ARS	2,005 ARS	
30-60 years old	1,600 ARS	1,758 ARS	
60-90 years old	2,000 ARS	2,233 ARS	

7. Clicking the *Comments* icon will display a pop-up to track any notes/guidelines as shown in the screenshot below.
  - a. These are saved to the Comments field on the Result object.



## View Results per Geographic Level

Funders can select different geographic levels when reviewing data since indicators can be reported at different geographic levels within a single reporting period.



Project **Education Investments & Grants**

Details Setup Framework Activities Indicators Targets **Results**

**Add Results**

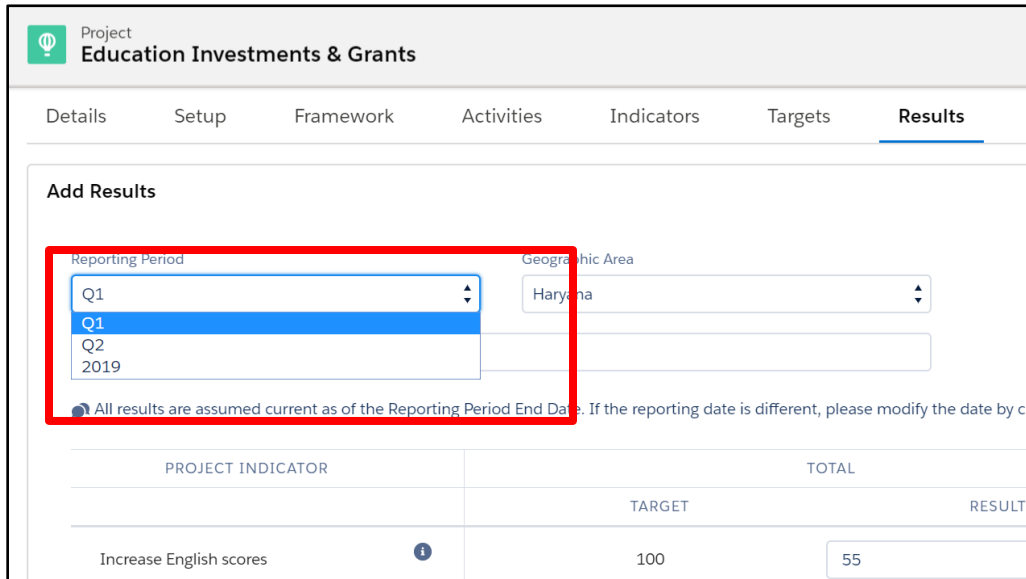
Reporting Period: Q1

Geographic Area: Haryana

Enter Search Text

## Toggle between different Reporting Periods

Funders can select different reporting periods from a dropdown.



Project **Education Investments & Grants**

Details Setup Framework Activities Indicators Targets **Results**

**Add Results**

Reporting Period: Q1

Geographic Area: Haryana

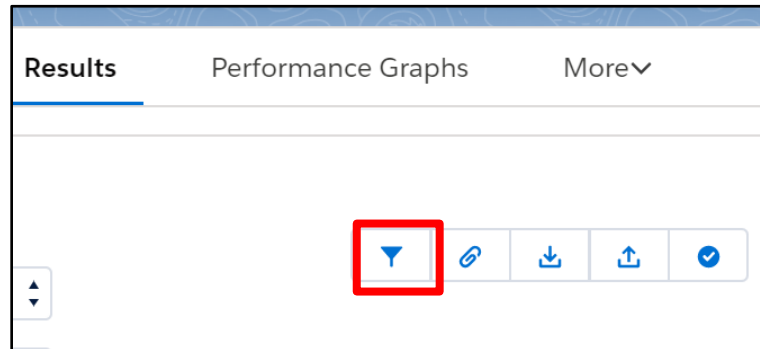
All results are assumed current as of the Reporting Period End Date. If the reporting date is different, please modify the date by clicking on the date field.

PROJECT INDICATOR	TOTAL	
	TARGET	RESULT
Increase English scores <span style="float: right;">?</span>	100	55

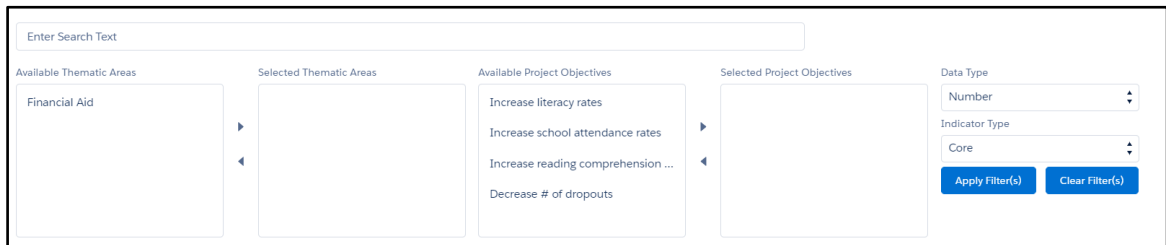
## Apply Indicator search filters

Funders may filter to specific indicators while reviewing results.

1. On the Results tab of your Project record, filter by the QuickSearch bar or click on the blue funnel icon as shown below to expand more filters.

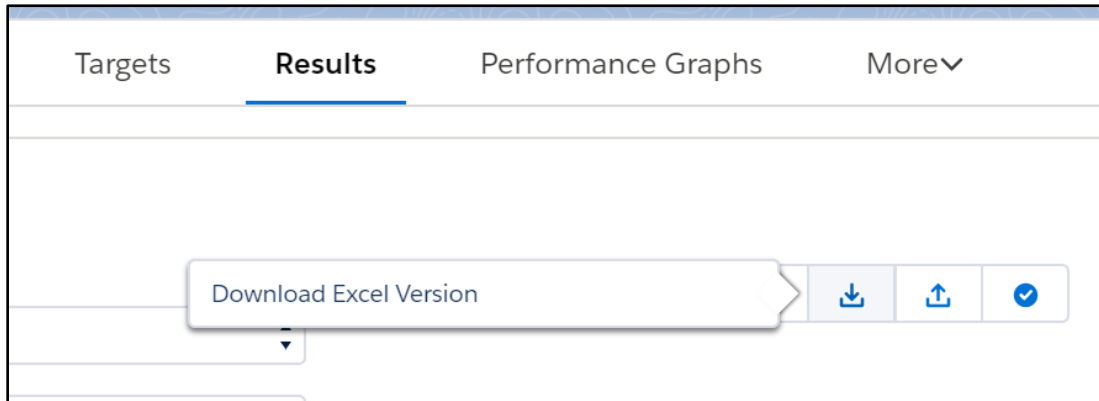


2. Expanding more filters enables funders to search indicators by thematic area, project objectives, data type, and indicator type.



## Download an Excel file to Review Results Offline

1. Click on the Download icon to view results, per screenshot below.



2. Click Generate.
3. Confirm the download.
4. Once the download completes, funders can view the Excel spreadsheet. The following screenshot is an example of a downloaded spreadsheet.

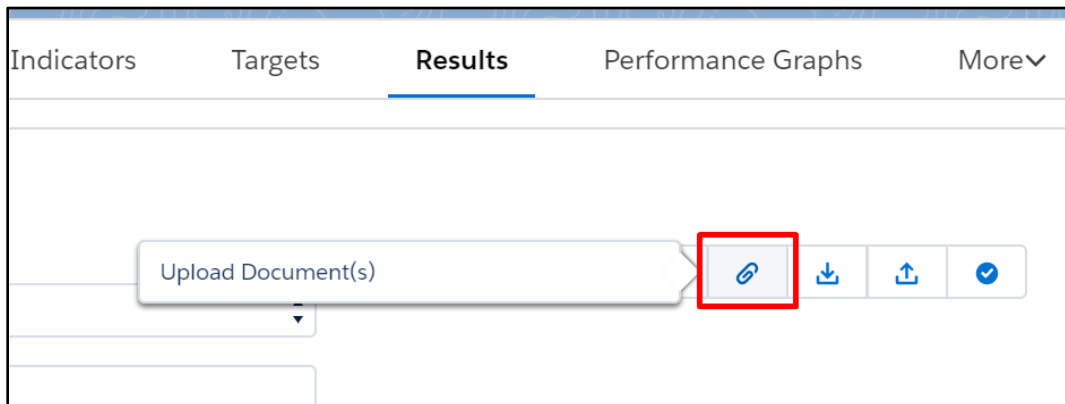
<b>Education Investments &amp; Grants - Q1 - Haryana - Results</b>						
Generated by: User User 10/1/2019 1:52 AM						
Objective(s)	Guideline	Indicator	Disaggregation	Total		Comments
				Target	Result	
	Track the testing scores	Increase English scores		100	55	
		Increase in French scores		100	90	
		Increase in Hindi scores		100	65	



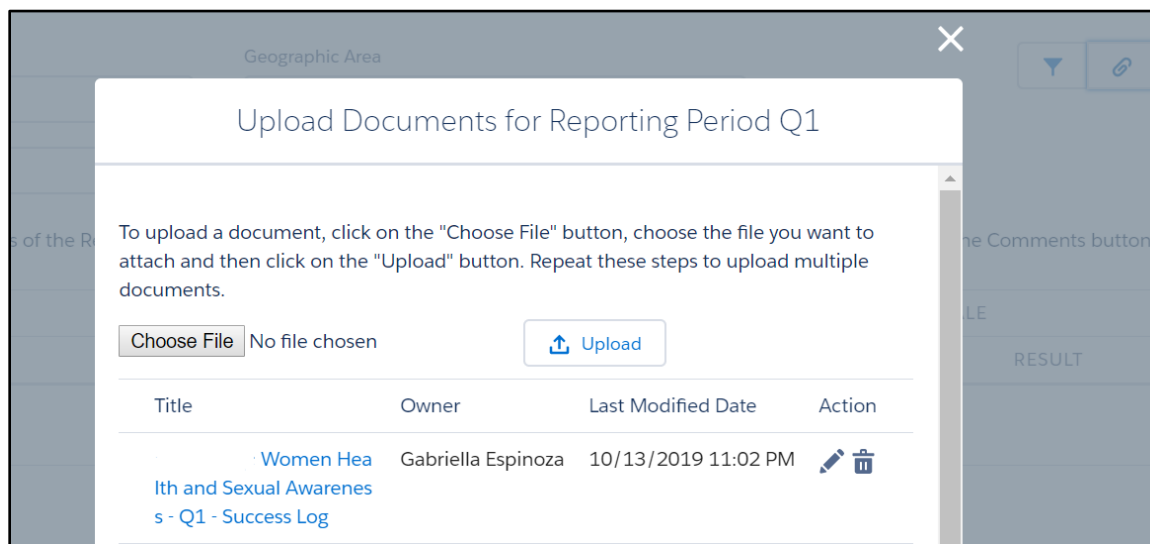
## Review supporting documents

Funders may access any supporting documents provided by grantee for all the indicators by clicking the Upload Documents icon.

Click on the *Upload Documents* button in the Results tab.

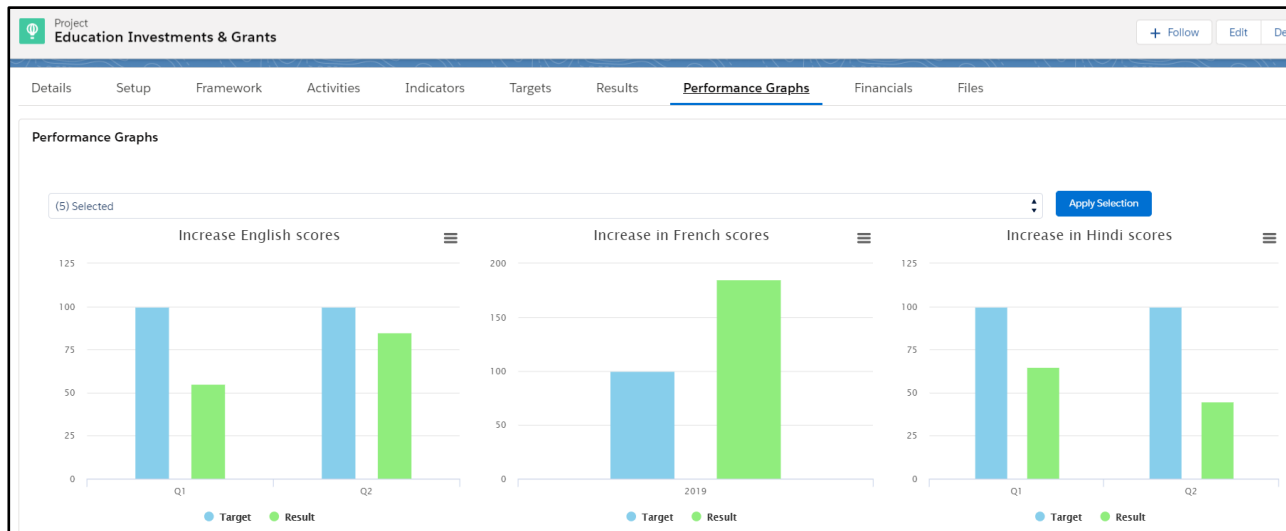


A pop-up will display including the historical files that were uploaded, downloaded, and generated by the grantee. See screenshot below.

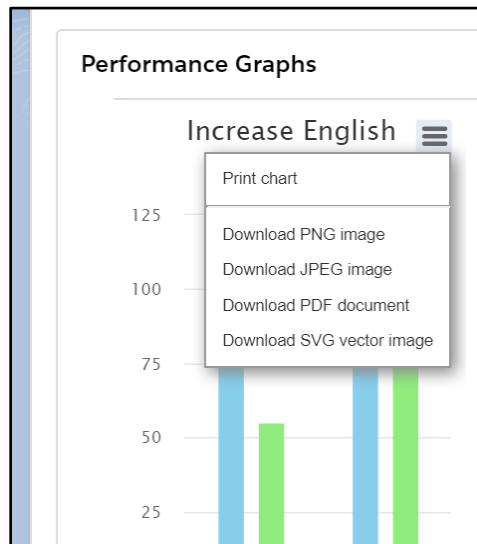


## Review Results Reported for all Reporting Periods

Funders can review reported results and visualize actuals compared to targets across all reporting periods using Performance Graphs as shown below.



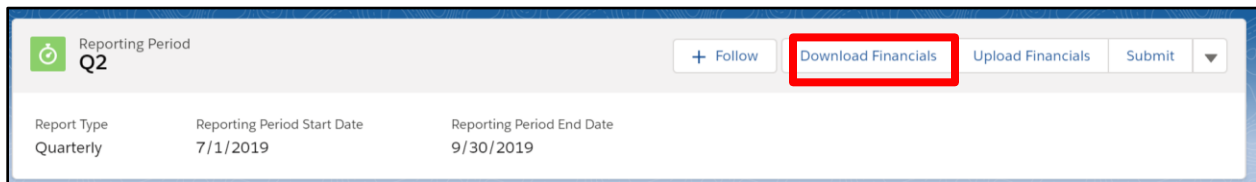
Funders can download a single performance graph as an image, document, or vector to include in presentations, decks, documents and emails. See screenshot below for the file types available.



## Review a Grant Report - Financials

Funders can view planned amount vs. actual amount financials.

1. Navigate to the desired reporting period record.
2. On the top right corner, click *Download Financials*, as shown below.



### ⓘ Admin Note:

Users may speak to a system admin to ensure that the custom fields have been added to the RP\_EXCEL\_COLUMNS fieldset on amp\_i\_Financial\_c.

3. Upon opening the downloaded Excel spreadsheet, funders may view two tabs:
  - a. Tab 1 - "Instructions" - shown below: this tab outlines how to enter data in a compatible format to upload the data onto the Budget page. All of the instructions are controlled by custom labels and can be edited to include customized or additional instructions.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
1	<b>Data Upload Instructions</b>																		
2																			
3	<b>Understanding the Downloaded Excel</b>																		
4	1. The second tab in this sheet contains the data for a Reporting Period.																		
5	2. All columns contain information about the Financials for that Reporting Period.																		
6	3. Optional: To view numeric (Currency, Number, and Percent) values in the number format according to User Locale rather than the default number format in Excel, the Number format in your computer																		
7	a. Instructions on how to customize Number format in Mac: <a href="https://support.apple.com/kb/PH23765?locale=en_US">https://support.apple.com/kb/PH23765?locale=en_US</a>																		
8	b. Instructions on how to customize Number format in Windows: <a href="https://docs.microsoft.com/en-us/globalization/locale/number-formatting">https://docs.microsoft.com/en-us/globalization/locale/number-formatting</a>																		
9	Additional Instructions: None																		
10																			
11	<b>Prepare the Excel for Upload</b>																		
12	You only need to enter data into the input cells, which are highlighted in blue.																		
13	To prevent errors in upload, follow the below steps:																		
14	1. Do not change any values in output cells (i.e. any white cells, such as Variance).																		
15	a. These will not be uploaded from the Excel file.																		
16	2. Match the data in the input cell(s) to the column's data type (e.g. only numeric values entered for Quantity).																		
17	3. New rows will create new financial line items on the Reporting Period and the selected Budget. If you want to update a line item, be sure to edit it directly on the second tab.																		
18	4. Do not edit the following:																		
19	a. Tab name (Reporting Period name)																		
20	b. Header text (Reporting Period name)																		

- b. Tab 2 - "Budget name" - shown below: this tab displays a template with column fields from the Financial object.

	A	B	C	D	E	F	G
1	<b>Financial Inclusion - 2019 Annual</b>						
2	Generated by: Gabriella Espinoza 10/18/2019 5:16 AM						
3	Name	Type	Category	Subcategory	Description	Amount Planned	Amount Actual
4	Materials and Sup	Expenditure	Office		Promotional assets	4500	5000
5	Staff Compensatio	Expenditure	Personnel	Salaries	Base pay excluding	325000	320000
6	Domestic travel	Expenditure	Travel	Transport	Roundtrip flight to	6725	7000
7							
8							
9							
10							
11							
12							
13							
14							
15							
16							
17							
18							
19							
20							

## Review a Grant Report - Narrative

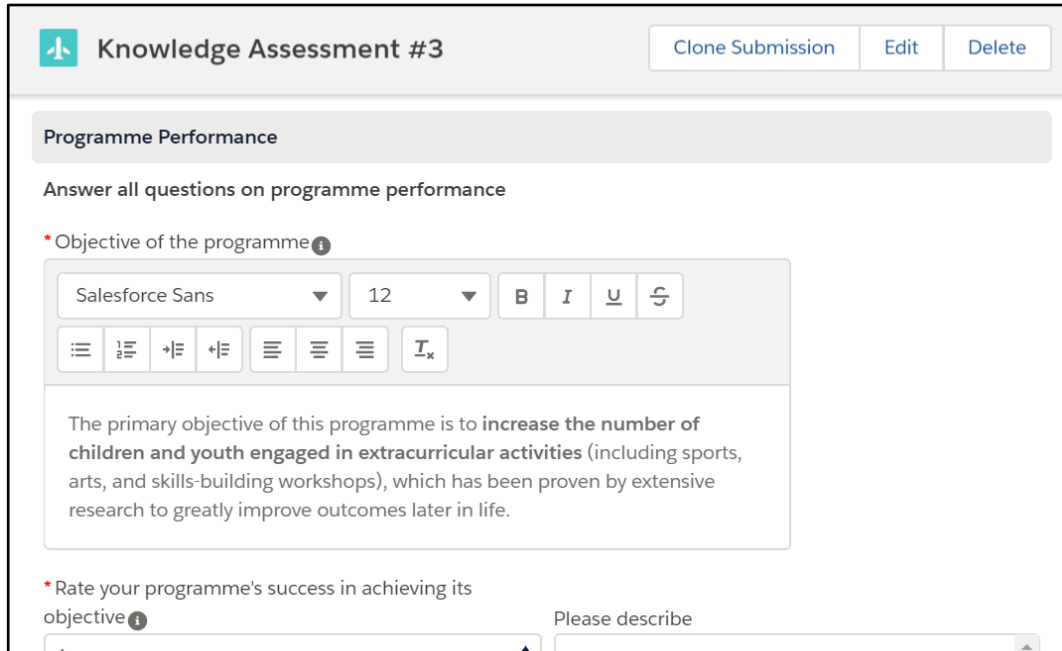
ⓘ Ensure the funder profile is granted permission to review and modify submission responses. Please contact a system admin for more details.

## View and/or Modify Narrative Report Response

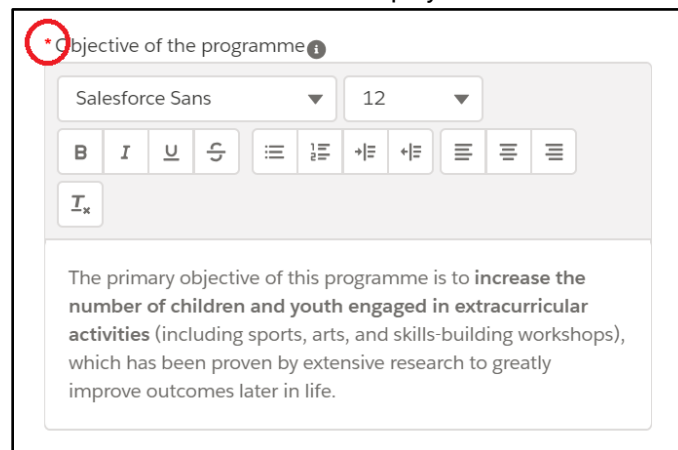
Once the narrative response has been submitted for review, funders can open, view, and modify the submission.

1. Navigate to Submissions from the main menu.
2. Open a Narrative Report response record that has been submitted for review.
3. Click on the Response tab.

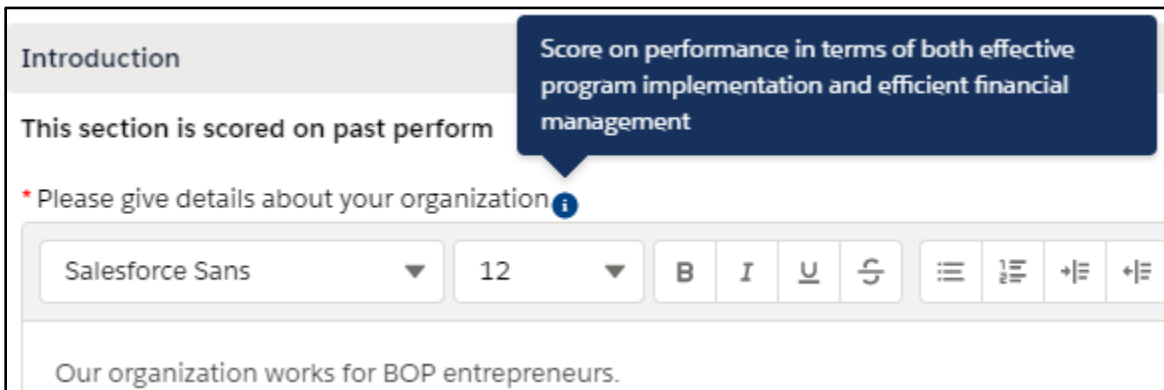
4. If the narrative report is divided into sections, each section will appear in a horizontal grey bar, with their related questions listed below.



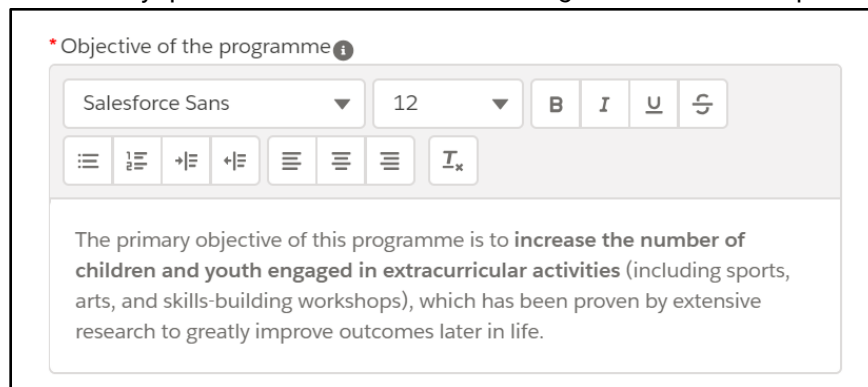
- a. If a section has defined instructions (i.e. `ampi_Instructions_c` is populated on the `ampi_Section_c` record), those appear directly below the grey bar and above the section's questions.
5. Check if a question is required (i.e. `ampi_Required_c` is TRUE on the `ampi_Question_c` record) by noting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



6. 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.



7. View/modify responses to questions depending on the questions' response types:
  - a. Qualitative - responses can consist of text, images, and/or formatted tables
    - i. Any qualitative values entered or changed are saved in `ampi__Text_Response__c`



- b. Short Text - responses can consist of a combination of letters and numbers.
      - i. Any short text values entered or changed are saved in `ampi__Short_Text_Response__c`.

Define a high level objective of programme in one sentence i

Improve educational outcomes of students in grades 9 and 10 through deployment of edutech

- c. 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 i

4

--None--  
 1  
 2  
 3  
4  
 5

- d. 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
- e. Multi-Select Picklist - responses are single or multiple values from a user-defined picklist

\* Amount in dollars spent implementing the project

20000.99999

Invalid number

- i. Any picklist value entered or changed are saved in `ampi_Multi_Select_Picklist_Response_c`

\* What are the health system level(s) involved in the program? i

Health facility X
District X
Central X

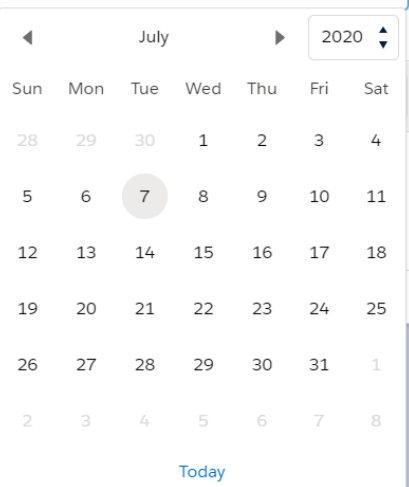
- f. Date - responses are a date value according to user locale.

**Program Background**

As needed, please break down any primary goal into secondary goals.

\* Date of Program Completion

\* Describe the primary goal(s) of the program.



i. Any date values entered or changed are saved in `ampi__Date_Response__c`.

8. View/modify comments or explanations to picklist or number answers.

- a. When a picklist or numeric question is created, users can decide to ask for supporting comments. For those questions, users will be able to type directly into a text input box displayed next to the picklist or number input box to provide additional information, or explanation.

b. Any comments entered or changed are saved in `ampi__Text_Response__c`

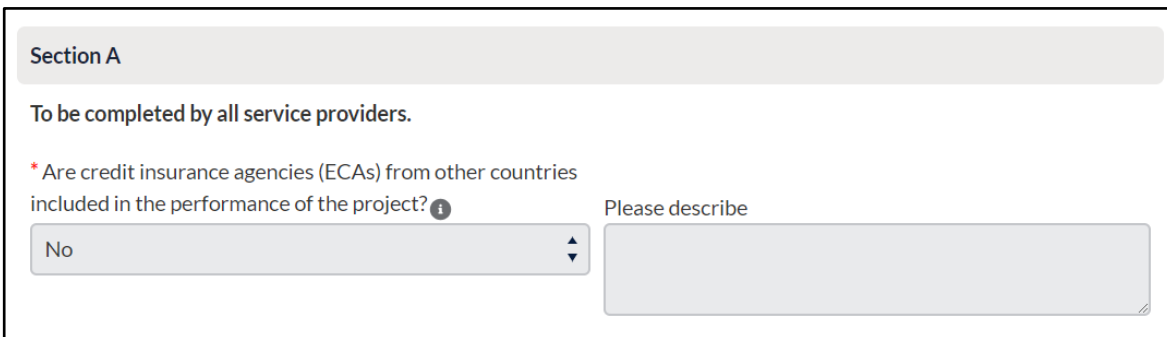
\* Rate your programme's success in achieving its objective ⓘ

Please describe

9. 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.



A reviewer's 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 display as read-only.



**Section A**

To be completed by all service providers.

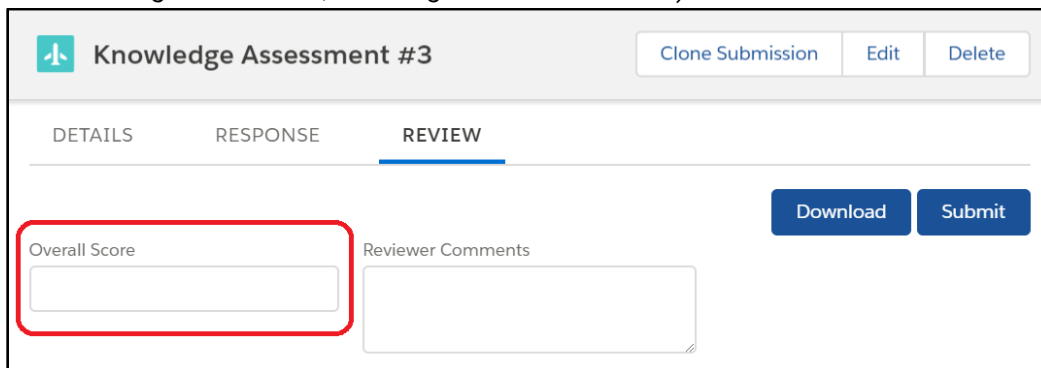
\* Are credit insurance agencies (ECAs) from other countries included in the performance of the project? ⓘ

No  Please describe

## 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. Assign an overall score to the entire submission.
  - 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).



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

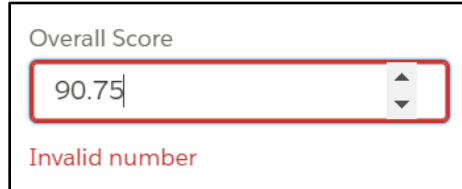
DETAILS    RESPONSE    **REVIEW**

Overall Score  Reviewer Comments

Download Submit

- 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

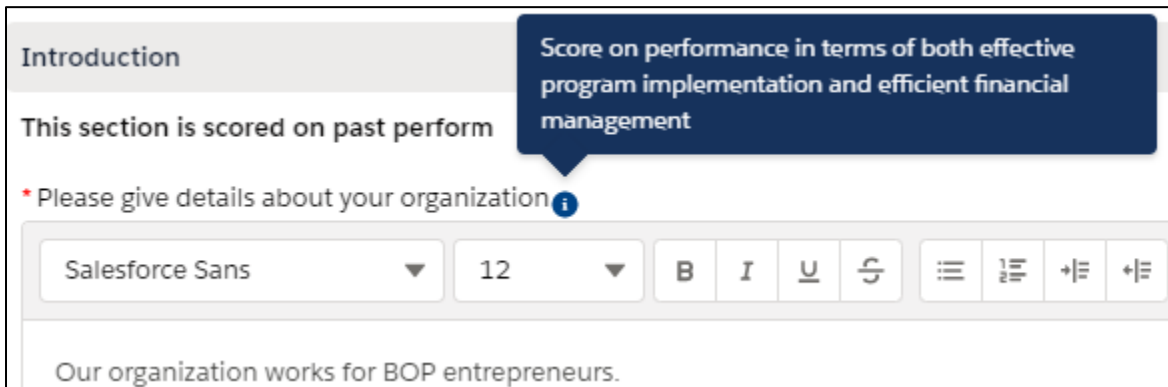


Overall Score

90.75

Invalid number


- 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 per question. These instructions may be different from the instructions given to respondents. See screenshot below.



**Introduction**

This section is scored on past perform

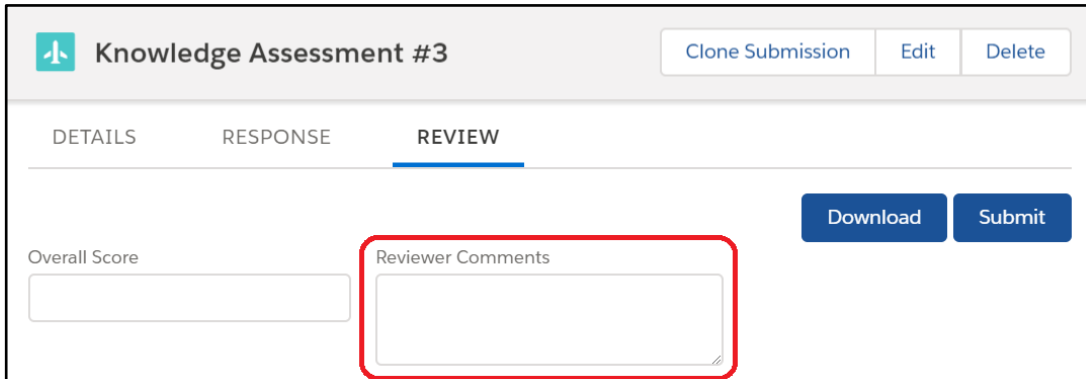
\* Please give details about your organization i

Salesforce Sans 12 B I U 

Our organization works for BOP entrepreneurs.

Score on performance in terms of both effective program implementation and efficient financial management

- 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.



Knowledge Assessment #3

Clone Submission Edit Delete

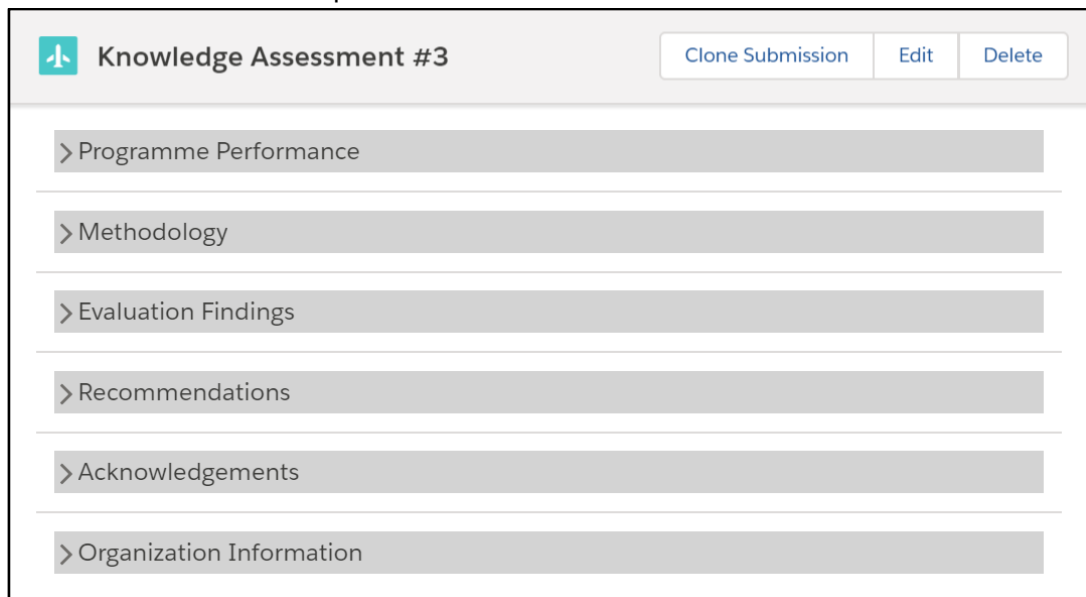
DETAILS RESPONSE REVIEW

Overall Score

Reviewer Comments

Download Submit

4. Assign an overall score for each individual section.
  - a. If the submission is divided into sections, each section will appear in a horizontal grey bar, with their related questions listed below.



Knowledge Assessment #3

Clone Submission Edit Delete

> Programme Performance

> Methodology


> Evaluation Findings

> Recommendations

> Acknowledgements

> Organization Information

- 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 style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
Rate the success staff had implementing this methodology 3	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" 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

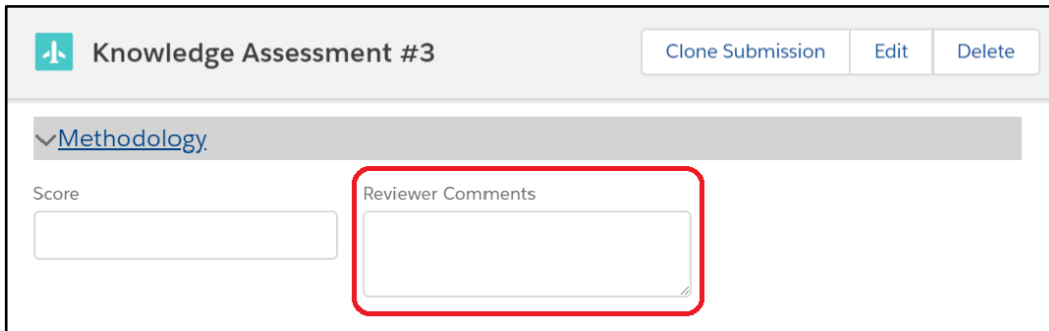
Clone Submission
Edit
Delete

✓ [Methodology.](#)

Score

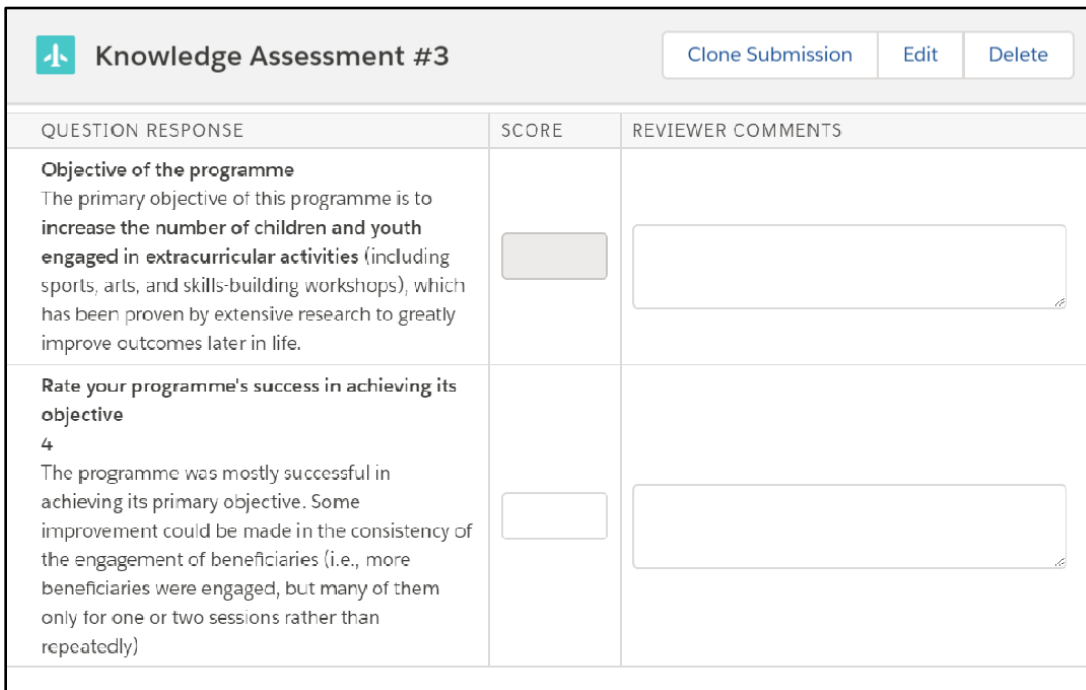
Reviewer Comments

- 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.



The screenshot shows a user interface for 'Knowledge Assessment #3'. At the top right, there are buttons for 'Clone Submission', 'Edit', and 'Delete'. Below this is a section header 'Methodology'. Underneath, there are two input fields: 'Score' and 'Reviewer Comments'. The 'Reviewer Comments' field is highlighted with a red border.

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.



The screenshot shows a table with three columns: 'QUESTION RESPONSE', 'SCORE', and 'REVIEWER COMMENTS'. The table contains two rows of data. The first row has a question response about the primary objective of the programme, a score input field, and a reviewer comments input field. The second row has a question response about the programme's success in achieving its objective, a score input field, and a reviewer comments input field.

QUESTION RESPONSE	SCORE	REVIEWER COMMENTS
<b>Objective of the programme</b> 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.	<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"/>

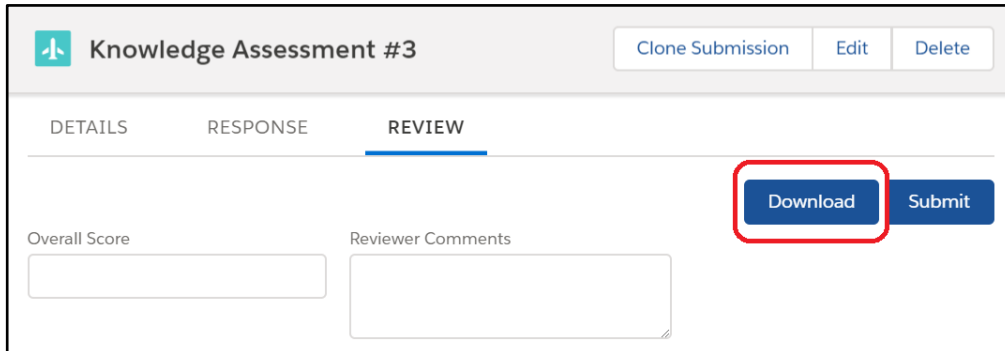
- i. Question Response: Contains the following field values on `ampi_Question_c` listed vertically

1. `ampi__Description__c`
  2. `ampi__Text_Response__c`, `ampi__Date_Response__c`,  
`ampi__Multi_Select_Picklist_Response__c` `ampi__Picklist_Response__c`,  
`ampi__Short_Text_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.

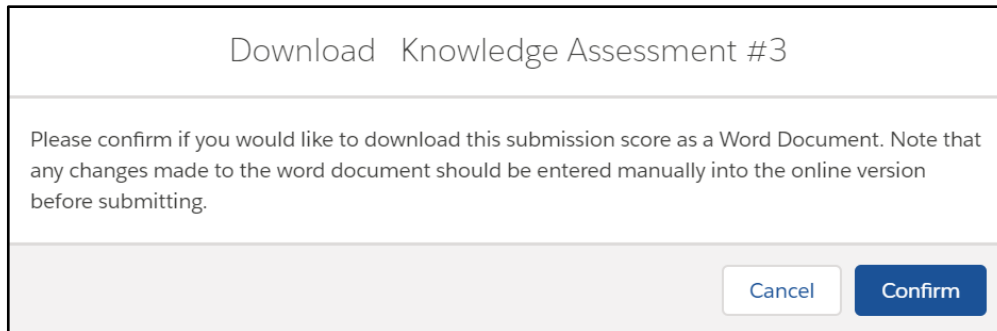
Once scores have been entered, users can either [download scores](#) as a Word document or [submit their scores](#) for a final review.

## 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.



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

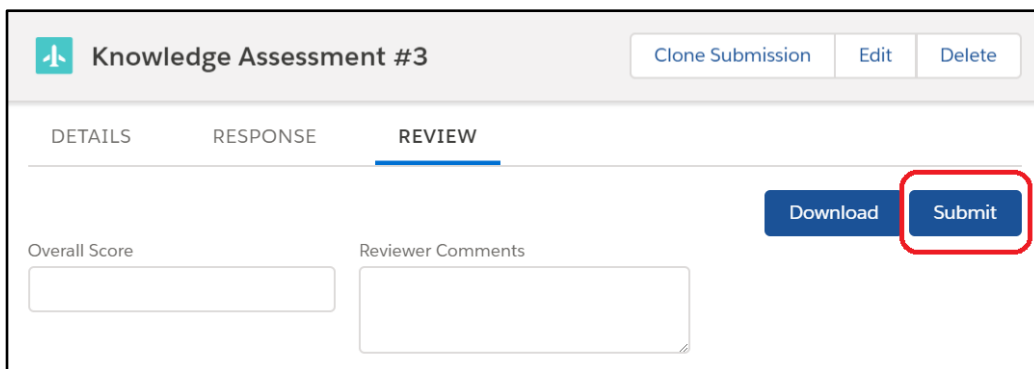


- Overall Score and Reviewer Comments for the entire submission are displayed at the top of the Word document, underneath the header.
- Section Score and Reviewer Comments fields are displayed below the relevant Section (and its instructions, if any exist).
  - If `ampi_Is_Scored_c` on the Section is 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.



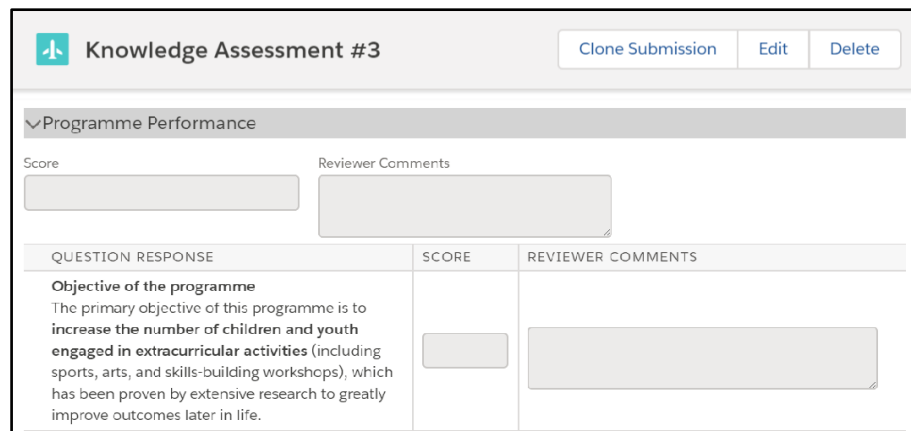
**Knowledge Assessment #3** Clone Submission Edit Delete

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 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.	<input type="text"/>	<input type="text"/>