Grantee User Guide: Reporting to Funders

Version Name: Delphinus | Release Date: August 2020

Overview

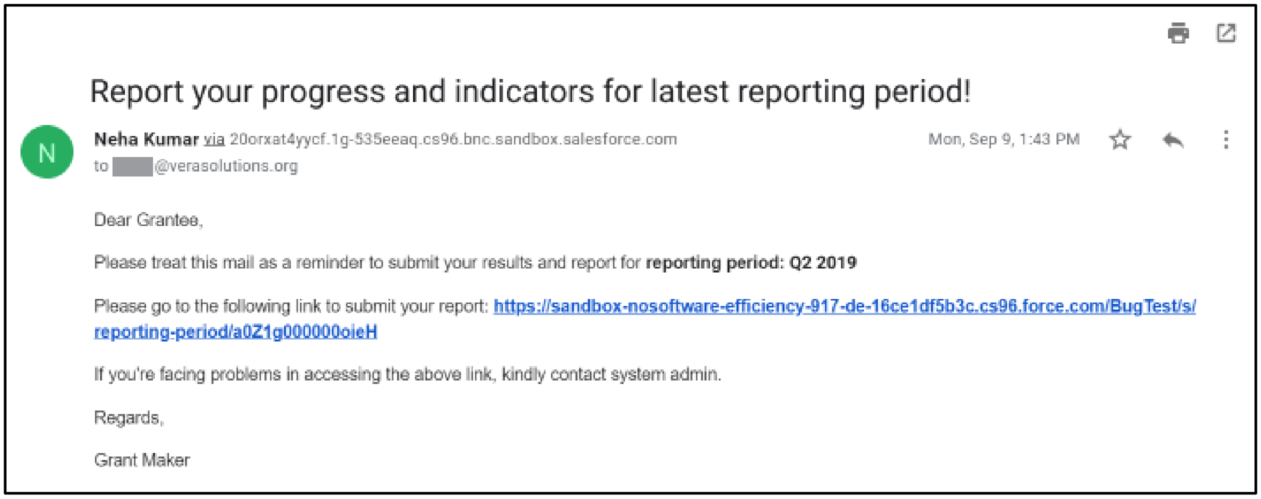
In this user guide, grantees will learn how to:

1. Login and access the portal
2. Add or upload indicator results
    a. Visualize targets vs. results in a performance graphs
3. Fill out narrative reports
4. Add or upload financials
5. Submit a grant report

To get started, grantees need to be invited to report via email.

Access grant reports via email

Grantees are sent an email, like the one shown below, hyperlinking the grant report by the grant-maker or funder. Clicking the hyperlink will open a new tab, where grantees can input their login credentials to access the reports. Automatic reminder emails are sent to the grantee according to upcoming reporting periods.



Report your progress and indicators for latest reporting period!

Neha Kumar via 20orxat4yycf.1g-535eeaq.cs96.bnc.sandbox.salesforce.com   Mon, Sep 9, 1:43 PM
to [redacted]@verasolutions.org

Dear Grantee,

Please treat this mail as a reminder to submit your results and report for **reporting period: Q2 2019**

Please go to the following link to submit your report: https://sandbox-nosoftware-efficiency-917-de-16ce1df5b3c.cs96.force.com/BugTest/s/reporting-period/a0Z1g000000oieH

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

Regards,

Grant Maker

ⓘ The email text and Community look-and-feel may differ as it can be customized by a funder.

Upon clicking the link to submit the report, grantees will be prompted to log in from an interface similar to the screenshot below.

Fill Out Grant Reports

Reports are assigned for grantees to complete. A funder may choose to collect quantitative and qualitative indicator data, narrative reports and financials as part of a grant report.

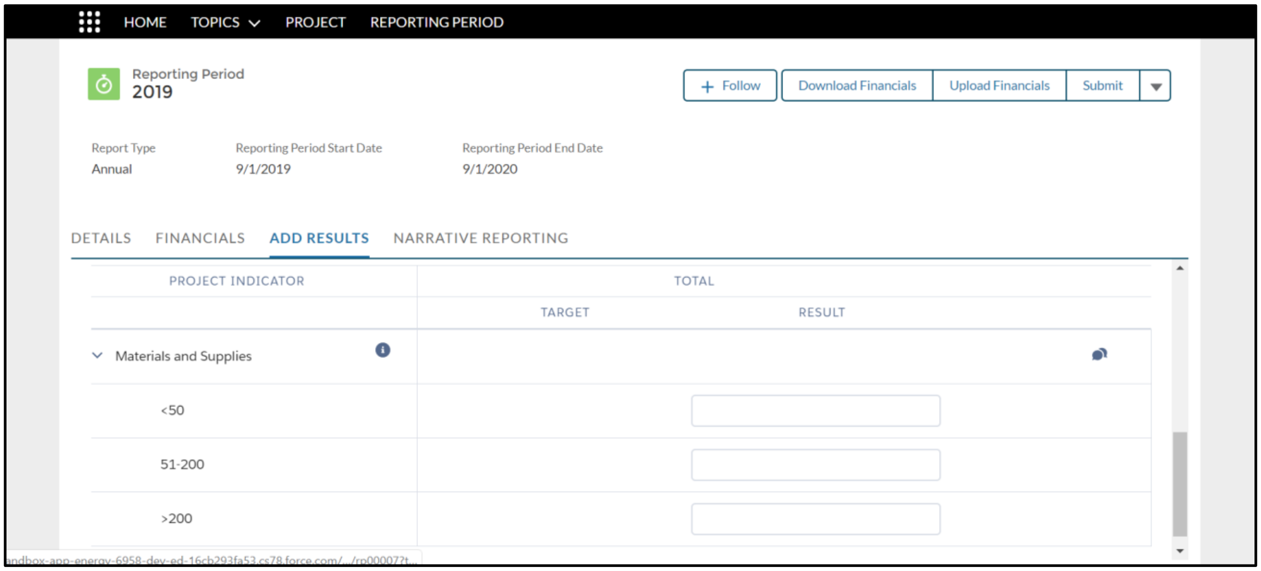
ⓘ Once a grant report has been submitted, the Add Results, Financials, and Narrative Reporting pages will lock and no longer be editable.

Add Results

Grantees may create, update, and upload results. Values inputted directly into the Result Entry interface are automatically saved.

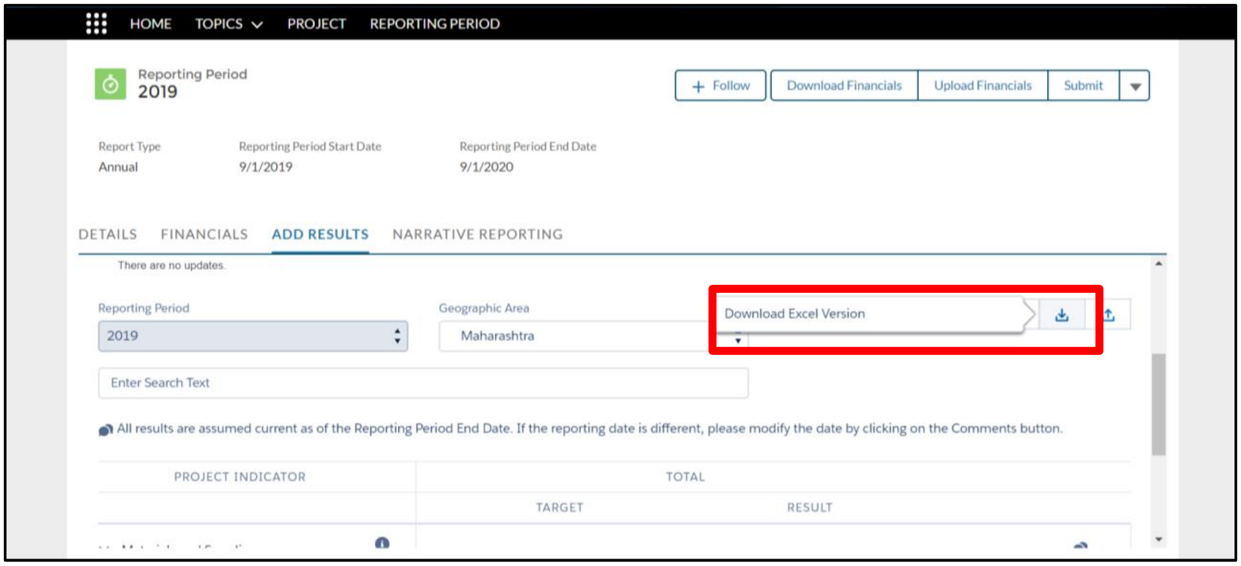
1. Click on the Add Results tab.

2. Create results by directly entering values in the Results interface, shown below. Grantees may input a number value up to 16 digits in length.
    a. If the grantee inputs a value that is 9 digits or more, the number is rounded to the nearest hundred thousand or million with one decimal place when grantee clicks outside of input field.
    b. An input larger than 16 digits will result in a validation error.



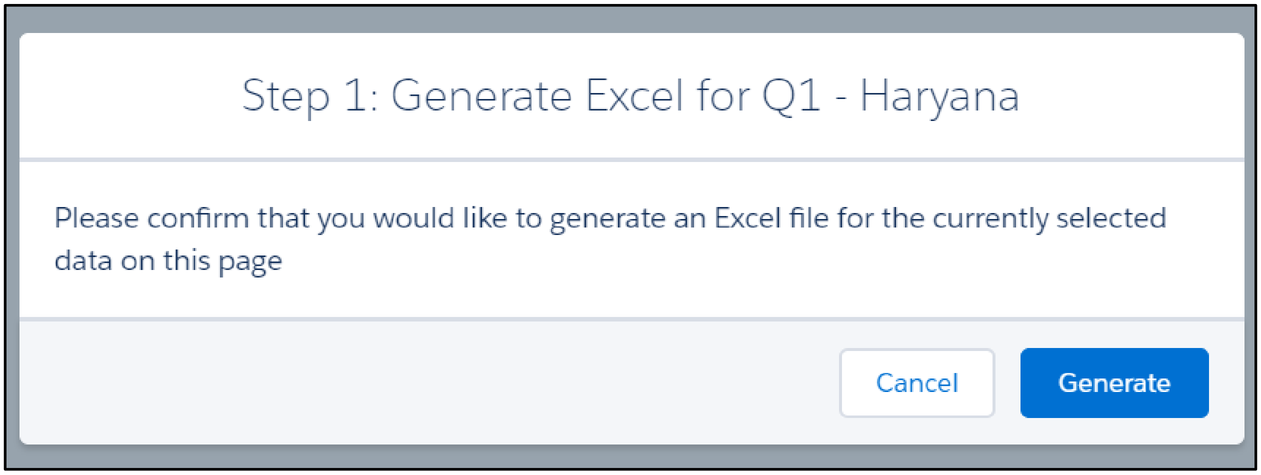
3. Similarly, grantees may update previously entered results by entering new values in the Results interface.

4. To work on data entry for results offline, grantees may click on Download Excel Version as shown below.



   a. Grantees can then use the auto-generated excel template to enter their results.

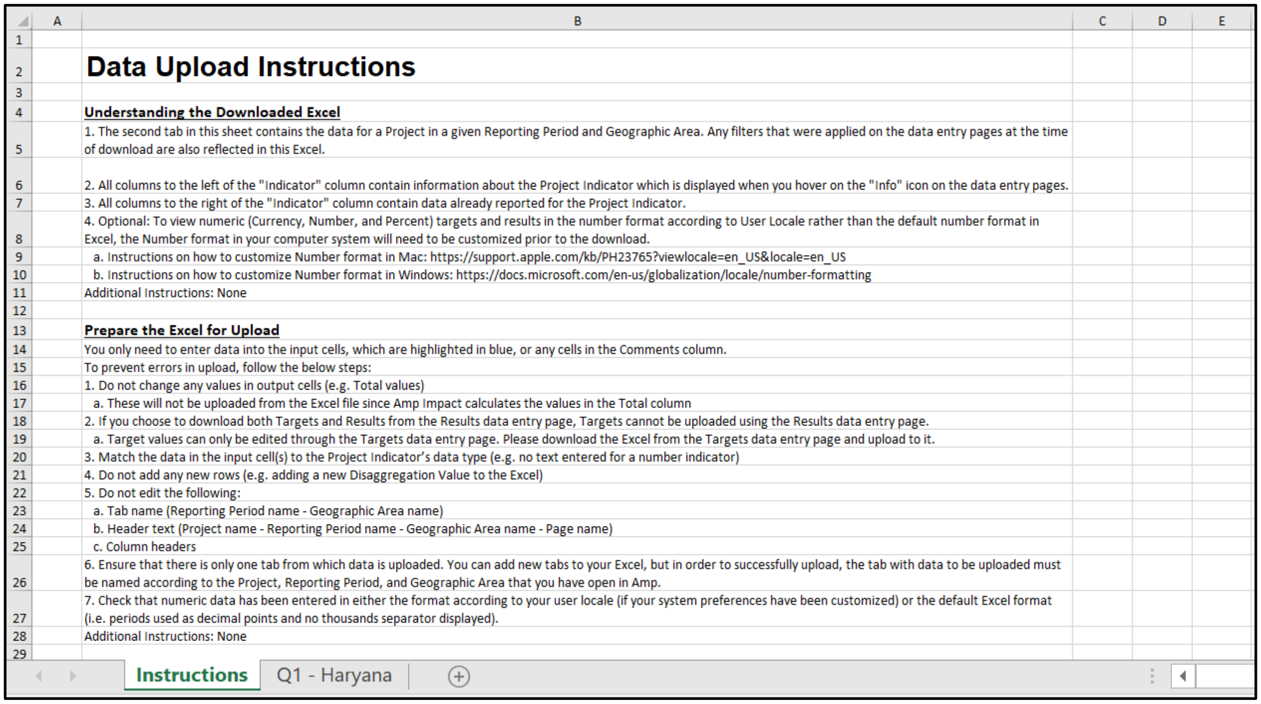
5. Confirm Download request by clicking "Generate", as shown below.



6. Confirm Download.

7. Open the generated Excel file to update rows with Results data.

8. Read the Instructions tab carefully, which is the default first tab as per the screenshot below.



Data Upload Instructions

Understanding the Downloaded Excel

1. The second tab in this sheet contains the data for a Project in a given Reporting Period and Geographic Area. Any filters that were applied on the data entry pages at the time of download are also reflected in this Excel.

2. All columns to the left of the "Indicator" column contain information about the Project Indicator which is displayed when you hover on the "Info" icon on the data entry pages.
3. All columns to the right of the "Indicator" column contain data already reported for the Project Indicator.
4. Optional: To view numeric (Currency, Number, and Percent) targets and results in the number format according to User Locale rather than the default number format in Excel, the Number format in your computer system will need to be customized prior to the download.
a. Instructions on how to customize Number format in Mac: https://support.apple.com/kb/PH23765?viewlocale=en_US&locale=en_US
b. Instructions on how to customize Number format in Windows: https://docs.microsoft.com/en-us/globalization/locale/number-formatting
Additional Instructions: None

Prepare the Excel for Upload

You only need to enter data into the input cells, which are highlighted in blue, or any cells in the Comments column.
To prevent errors in upload, follow the below steps:
1. Do not change any values in output cells (e.g. Total values)
a. These will not be uploaded from the Excel file since Amp Impact calculates the values in the Total column
2. If you choose to download both Targets and Results from the Results data entry page, Targets cannot be uploaded using the Results data entry page.
a. Target values can only be edited through the Targets data entry page. Please download the Excel from the Targets data entry page and upload to it.
3. Match the data in the input cell(s) to the Project Indicator's data type (e.g. no text entered for a number indicator)
4. Do not add any new rows (e.g. adding a new Disaggregation Value to the Excel)
5. Do not edit the following:
a. Tab name (Reporting Period name - Geographic Area name)
b. Header text (Project name - Reporting Period name - Geographic Area name - Page name)
c. Column headers
6. Ensure that there is only one tab from which data is uploaded. You can add new tabs to your Excel, but in order to successfully upload, the tab with data to be uploaded must be named according to the Project, Reporting Period, and Geographic Area that you have open in Amp.
7. Check that numeric data has been entered in either the format according to your user locale (if your system preferences have been customized) or the default Excel format (i.e. periods used as decimal points and no thousands separator displayed).
Additional Instructions: None

Instructions | Q1 - Haryana

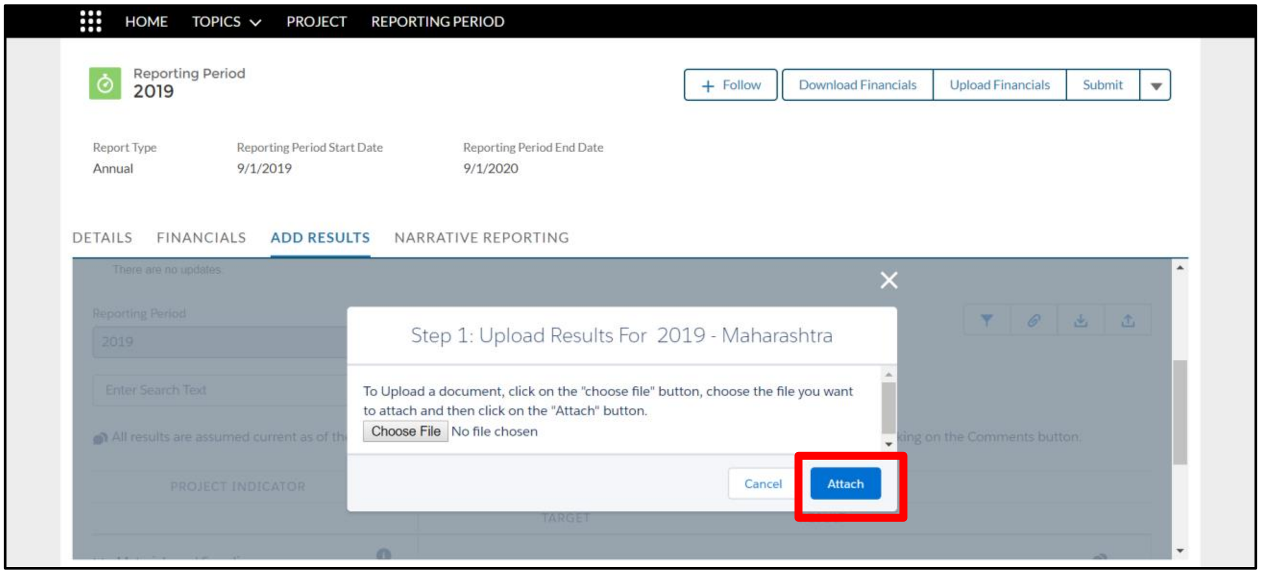
a. Ensure data follows the outlined guidelines for upload.

9. After updating Results, save the Excel file.

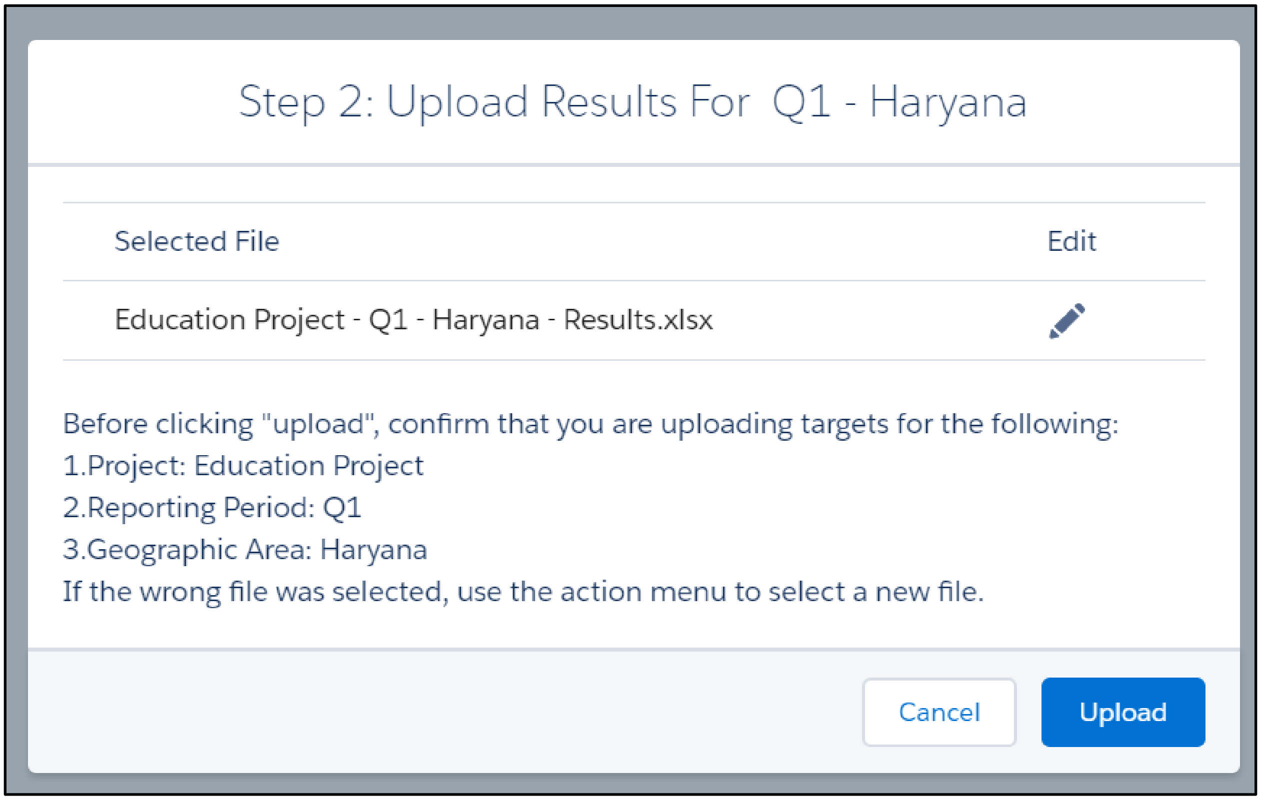
10. Return to the Add Results tab.

11. Click the Upload icon next to the Download icon.

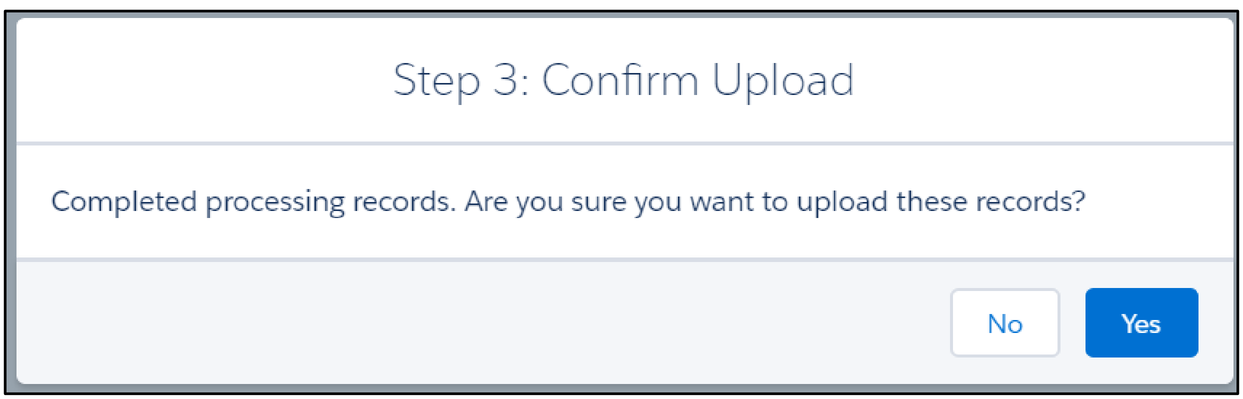
12. Attach updated .xlsx file in popup by clicking the Attach button.



13. On Step 2, confirm that the attached .xlsx file is the updated file.



14. On Step 3, confirm Upload by clicking Yes, screenshot below.

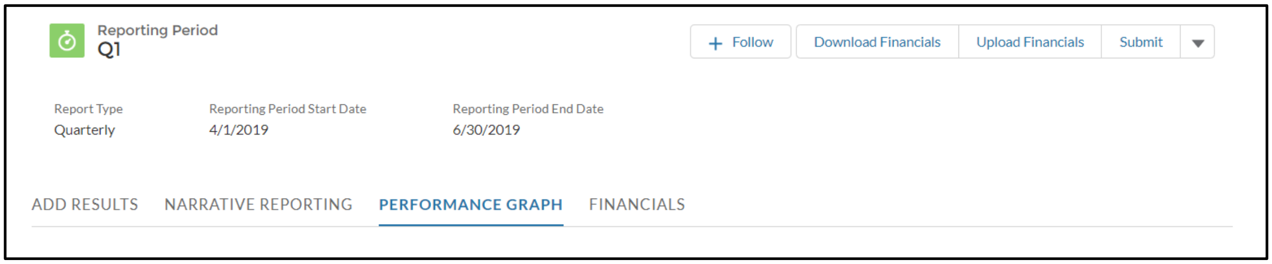


15. Any values entered directly into the Result Entry interface are automatically saved.
    a. New values in previously empty rows create new Result records.
    b. New values in previously non-empty rows update existing Result records.
    c. Any values uploaded via the Excel upload interface are upserted to Result records

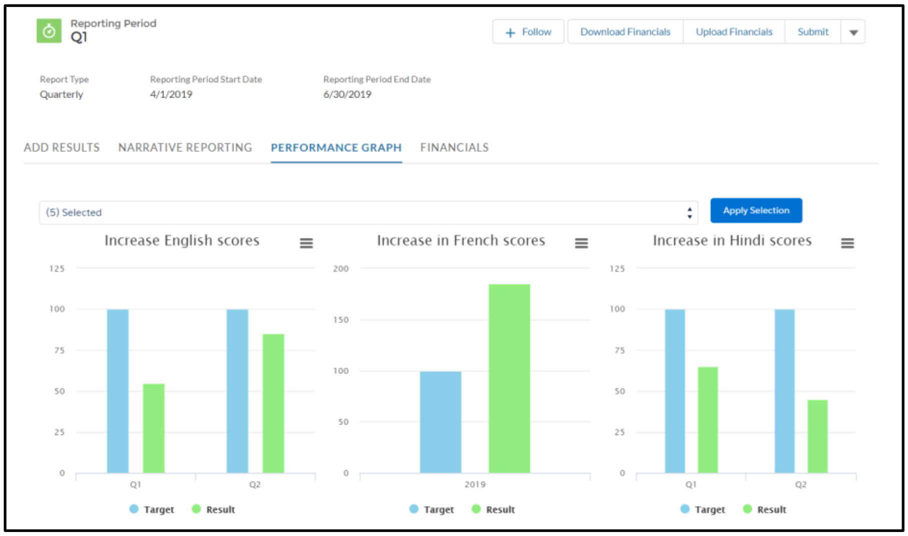
Visualize Results vs. Targets in Performance Graphs

After adding results, grantees may view performance graphs that display targets vs. actuals, or results.

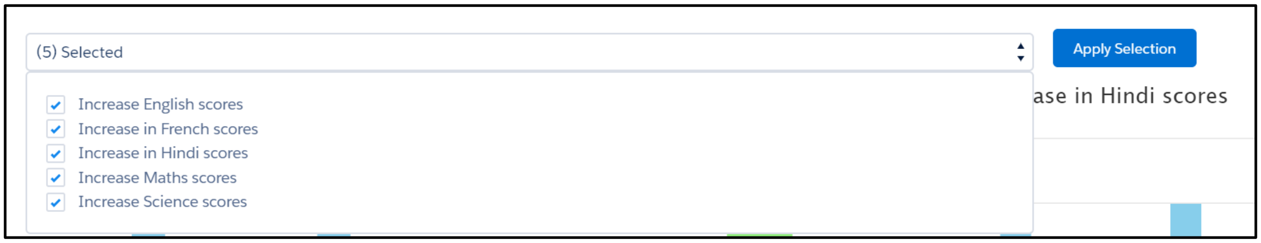
1. On the Reporting Period, click the Performance Graphs tab as shown below.



2. View performance graphs according to active indicators with target and result inputs.
    a. The first 9 indicators, as ordered on the AddResults page, are automatically selected.
    b. If the project has fewer than 9 indicators, all indicators are displayed
    c. Indicators display across all reporting periods
    d. Graphs do not include cross-disaggregation by sex, if applicable



3. To view specific indicators only, click on the dropdown above the graphs to select via checkbox which indicators to render, as shown below.

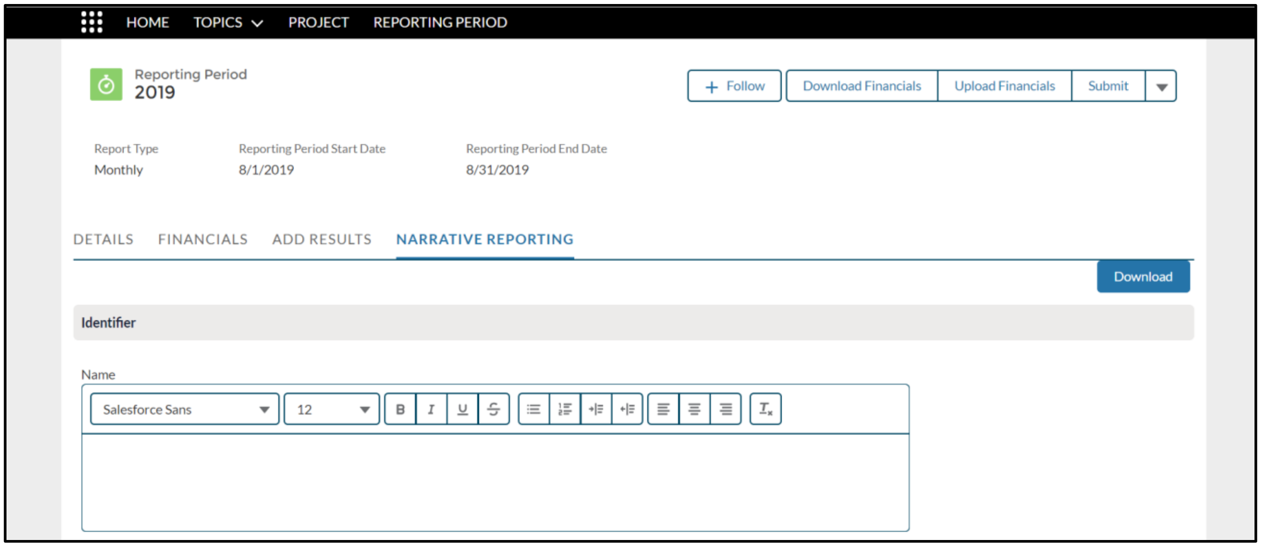


4. Click Apply Selection.

Add Narrative Reporting

1. Open the Reporting Period record. Navigate to the Narrative Reporting section, as displayed in step 2.

2. If the report is divided into sections, each section will appear over a horizontal grey bar, with their related questions listed below. Questions are displayed according to response type (qualitative, short text, number, multi-select picklist, date, or picklist), as seen below.

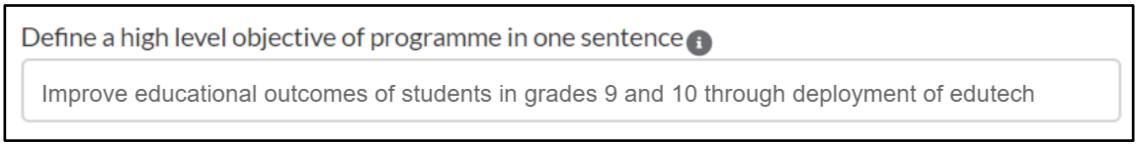


3. Check if a question is required by noting whether or not it has a *red asterisk* displayed next to it.

4. Check if a question has any special instructions/criteria by hovering over the *info icon* to expand the help text.

5. Respond to questions depending on the questions' response types:
    a. *Text/Qualitative* - respond in a rich text editor which allows responses such as typed text, insert images and tables
        i. If word limits are defined for Question__c records, 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 word limit.

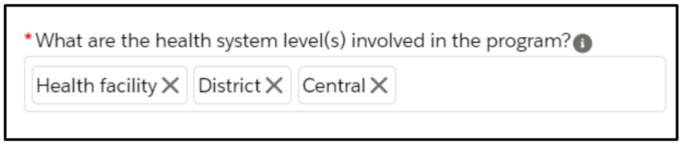
    b. Short Text - respond in an input text field using a combination of letters and numbers.
        i. Any short text response values entered are saved in ampi__Short_Text_Response_c.
        ii. If the default word limit (255 characters) or user-defined word limit set by the template creator in the Text Response Character Limit field for a Question__c record are violated by the respondent, then an error message displays when the user clicks out of the input field stating that the prescribed word limit is exceeded.



c. *Picklist* - select a single value from the pre-defined picklist

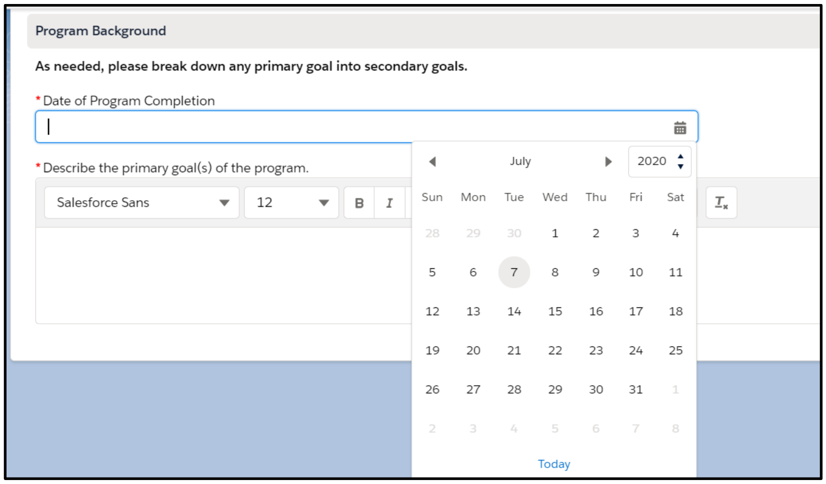
d. *Number* - enter a numeric value with up to 16 digits and 2 decimal places (i.e. 19 total characters)
    i. If a value entered exceeds the digit or decimal count, an error message will display

e. *Multi-Select Picklist* - Select single or multiple values from a user-defined picklist



i. Any picklist value entered or changed are saved in ampi__Multi_Select_Picklist_Response__c

f. *Date* - select or enter a date value from a datepicker component.

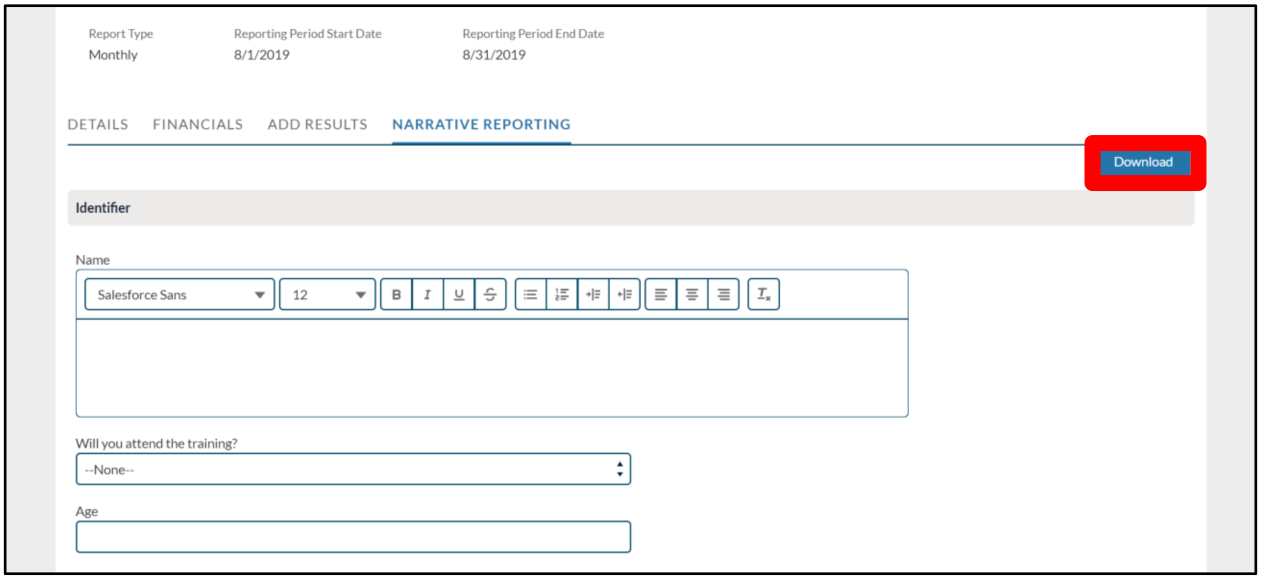


i. Any date values entered or changed are saved in ampi__Date_Response__c.

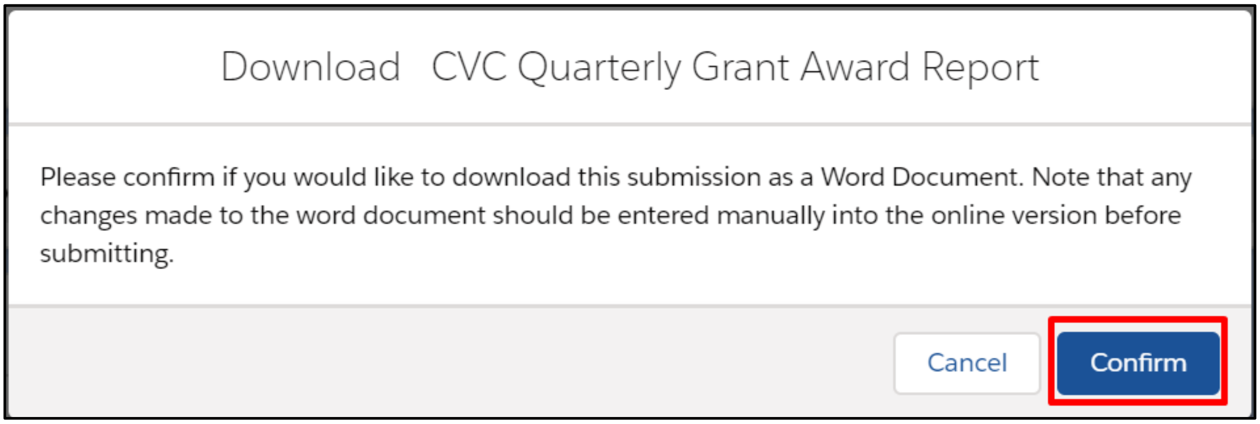
6. Add comments or explanations to the picklist or number answers.
    a. Some picklist or number questions may allow grantees to provide an explanation to their response. Grantees will be able to type directly into a text input box displayed next to the picklist or number input box to add that information.

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

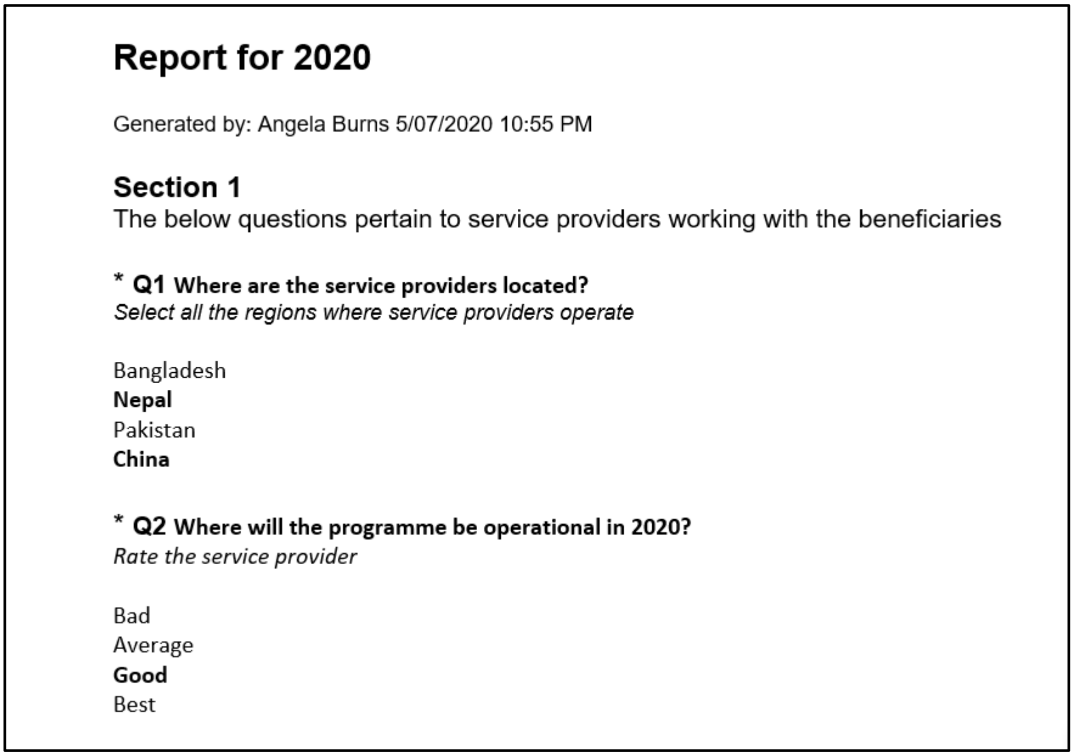
8. Responses are auto-saved, question records are automatically updated with the entered/modified responses. If entered/modified responses are invalid (i.e. too many characters or incorrect response type), grantee is notified to fix their response
    a. For any offline work that might be required to 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. See below for screenshot.



9. A pop-up will appear, prompting the user to confirm the download, as shown in the screenshot below.



10. 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.
    a. If any answers were entered, those will display below their related questions in the Word document.
        i. For picklist and multi-select picklist questions, the selected picklist value(s) will display in bold, and unselected picklist values will display in normal text.



Report for 2020

Generated by: Angela Burns 5/07/2020 10:55 PM

Section 1
The below questions pertain to service providers working with the beneficiaries

* **Q1 Where are the service providers located?**
Select all the regions where service providers operate

Bangladesh
Nepal
Pakistan
China

* **Q2 Where will the programme be operational in 2020?**
Rate the service provider

Bad
Average
Good
Best

b. 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
   i. For picklist and multi-select picklist questions, the picklist values will display as options in normal text.

Report for 2020

Generated by: Angela Burns 5/07/2020 10:55 PM

Section 1
The below questions pertain to service providers working with the beneficiaries

* **Q1 Where are the service providers located?**
Select all the regions where service providers operate

Bangladesh
Nepal
Pakistan
China

* **Q2 Where will the programme be operational in 2020?**
Rate the service provider

Bad
Average
Good
Best

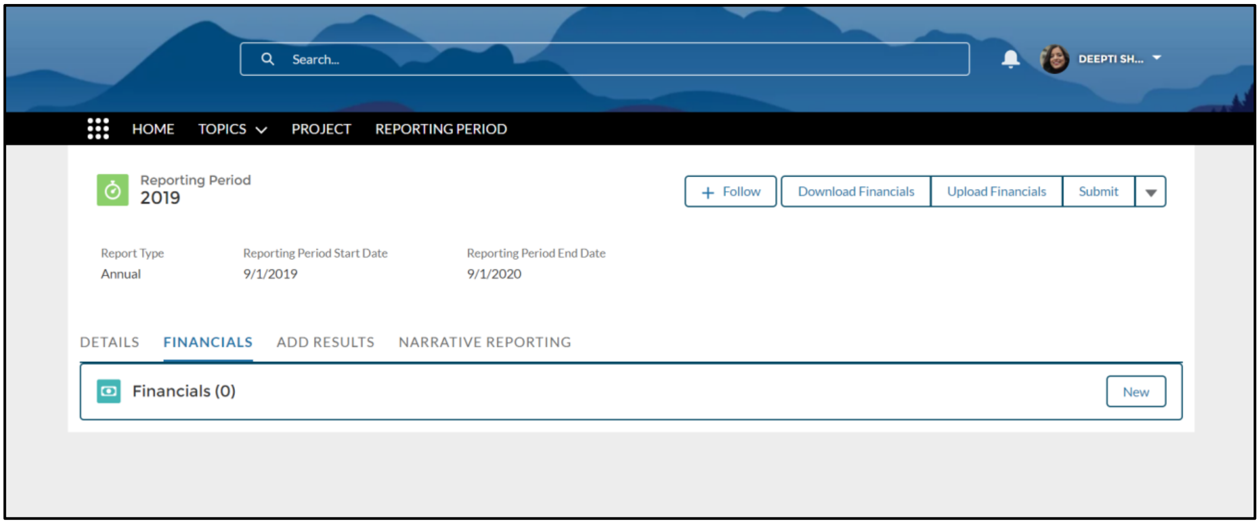
Add Financials

On the Financials tab, grantees may review, add, update, and upload financial and budget records pertaining to their reporting.

1. Click on the Financials tab.

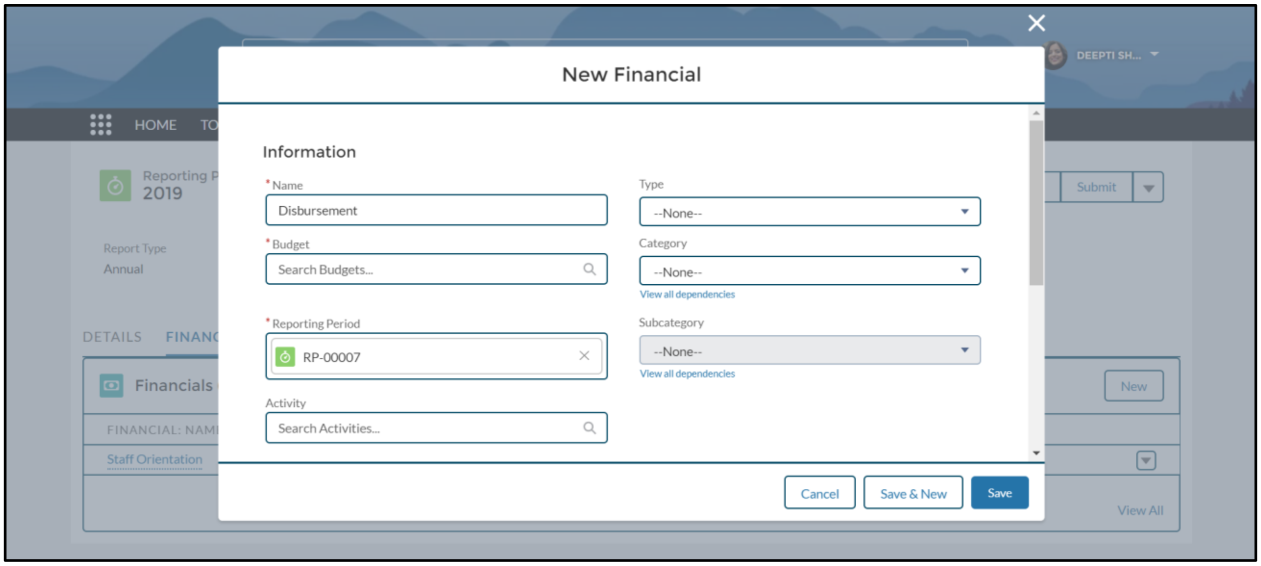
2. Create or update values by manual input or by uploading data using the template.

3. To create a new financial value, click the New button.



4. Fill out name, budget, reporting period, which are mandatory fields necessary to create a new financial line. It is highly recommended to include financial type, category, and subcategory if applicable from the picklist. Click Save when done. See screenshot below.

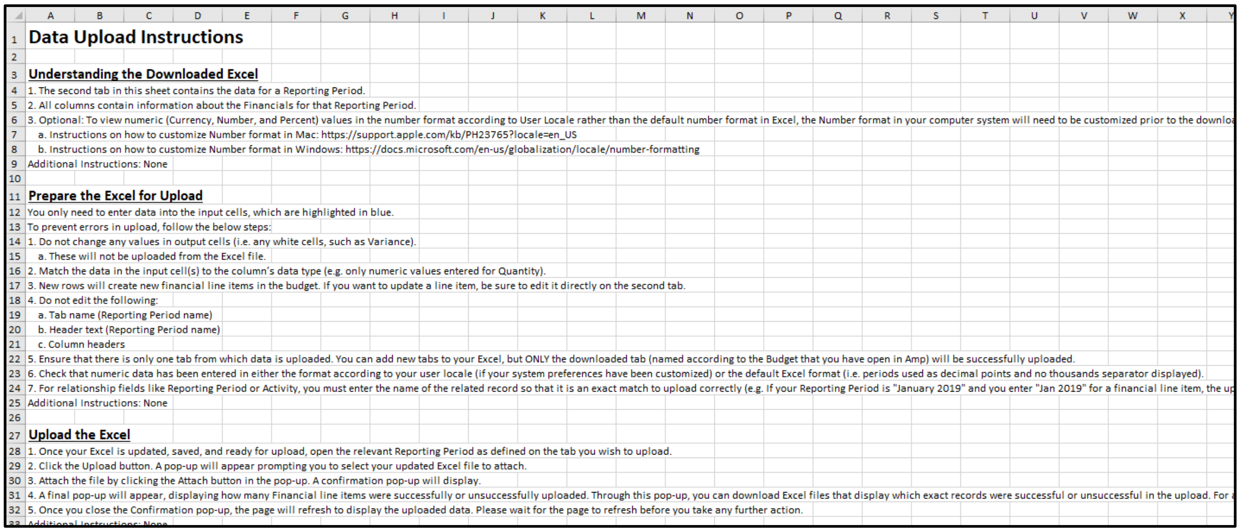
ⓘ Once created, Budget names cannot be edited. This is due to the fact that the Budget name is a Master-Detail relationship field type that cannot be reparented.



5. In addition to working online, grantees can also download an Excel file to create new financial line items and/or edit existing information.

ⓘ Users may speak to a system admin to ensure that the custom fields have been added to the RP_EXCEL_COLUMNS fieldset on ampi__Financial__c.

6. To download the Excel, click on “Download Financials”. An excel file will be downloaded on the same screen. Open the file and first read the detailed information in the *Instructions* tab, screenshot below.



Data Upload Instructions

Understanding the Downloaded Excel

1. The second tab in this sheet contains the data for a Reporting Period.
2. All columns contain information about the Financials for that Reporting Period.
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 system will need to be customized prior to the downloa
   a. Instructions on how to customize Number format in Mac: https://support.apple.com/kb/PH23765?locale=en_US
   b. Instructions on how to customize Number format in Windows: https://docs.microsoft.com/en-us/globalization/locale/number-formatting

Additional Instructions: None

Prepare the Excel for Upload

You only need to enter data into the input cells, which are highlighted in blue.
To prevent errors in upload, follow the below steps:
1. Do not change any values in output cells (i.e. any white cells, such as Variance).
   a. These will not be uploaded from the Excel file.
2. Match the data in the input cell(s) to the column’s data type (e.g. only numeric values entered for Quantity).
3. New rows will create new financial line items in the budget. If you want to update a line item, be sure to edit it directly on the second tab.
4. Do not edit the following:
   a. Tab name (Reporting Period name)
   b. Header text (Reporting Period name)
   c. Column headers
5. Ensure that there is only one tab from which data is uploaded. You can add new tabs to your Excel, but ONLY the downloaded tab (named according to the Budget that you have open in Amp) will be successfully uploaded.
6. Check that numeric data has been entered in either the format according to your user locale (if your system preferences have been customized) or the default Excel format (i.e. periods used as decimal points and no thousands separator displayed).
7. For relationship fields like Reporting Period or Activity, you must enter the name of the related record so that it is an exact match to upload correctly (e.g. If your Reporting Period is "January 2019" and you enter "Jan 2019" for a financial line item, the up

Additional Instructions: None

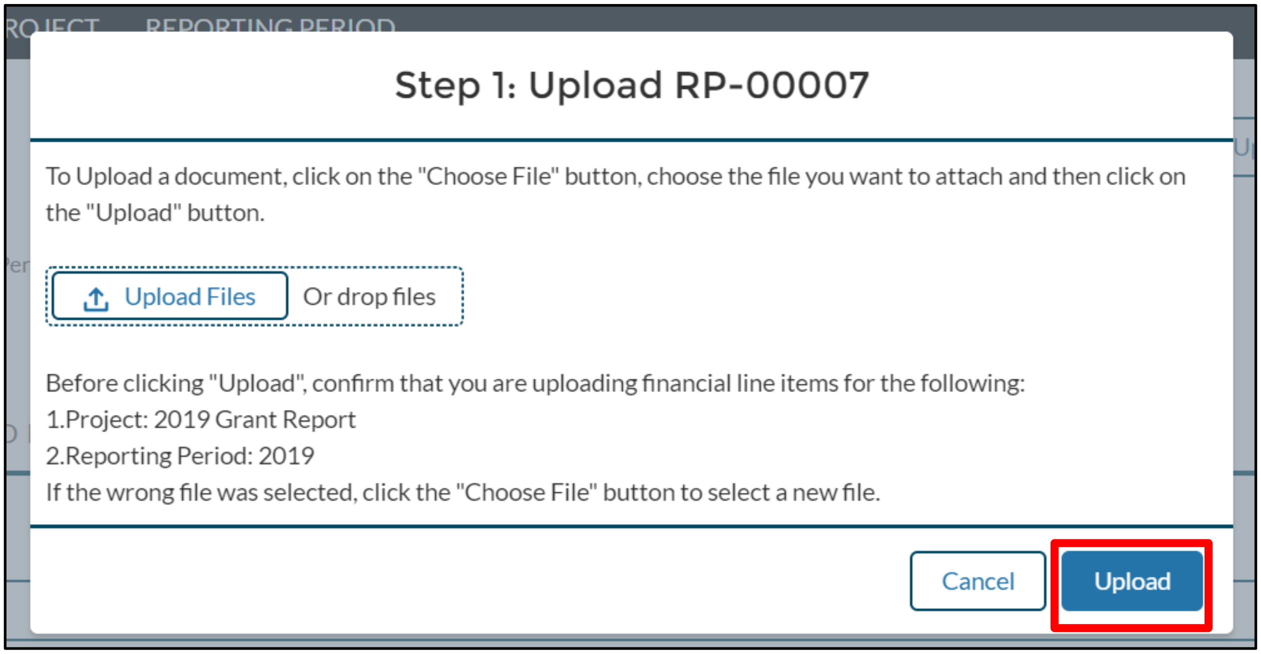
Upload the Excel

1. Once your Excel is updated, saved, and ready for upload, open the relevant Reporting Period as defined on the tab you wish to upload.
2. Click the Upload button. A pop-up will appear prompting you to select your updated Excel file to attach.
3. Attach the file by clicking the Attach button in the pop-up. A confirmation pop-up will display.
4. A final pop-up will appear, displaying how many Financial line items were successfully or unsuccessfully uploaded. Through this pop-up, you can download Excel files that display which exact records were successful or unsuccessful in the upload. For a
5. Once you close the Confirmation pop-up, the page will refresh to display the uploaded data. Please wait for the page to refresh before you take any further action.

Additional Instructions: None

7. In Excel, create new financial line items or edit existing financials. Once complete, click Save. This may save to the Downloads folder, be sure to save the file to the appropriate space.

8. Back on the Financials tab, click on “Upload Financials”. A popup will display with instructions for Step 1.
   a. Step 1: Click “Upload Files” to find and select the updated excel file. Once selected, click “Upload” to attach the updated .xlsx file.
   b. Step 2: Confirm Upload.



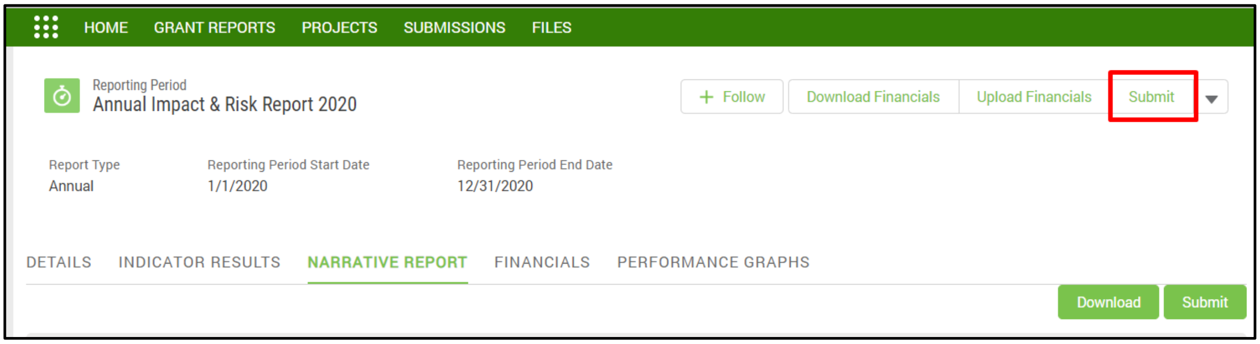
c. Step 3: Upon upload, grantees may view error and success logs. Note that if budget is locked, grantees will be unable to successfully upsert data as per the error log.

> ⓘ Note that a single reporting period may have multiple budgets. Grantees can enter financials related to one or more budgets within a single reporting period. As grantees add new financials, they may click into the Budget field to search and select from a list of available Budgets.

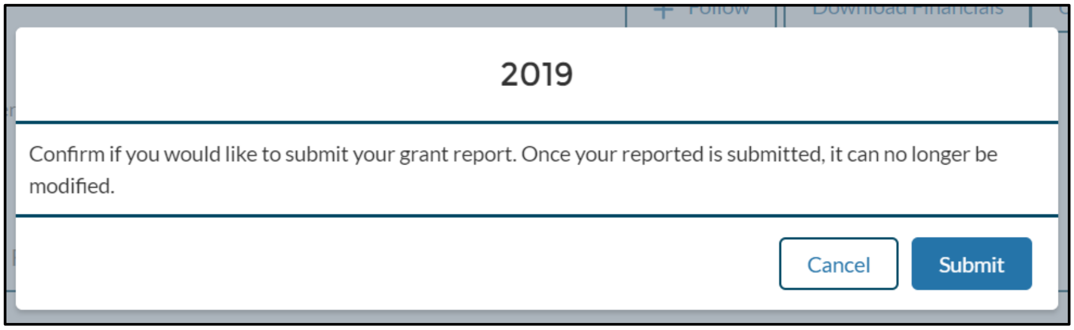
Submit the Grant

Once all answers have been entered and saved, users can submit their response to be reviewed and/or scored by the funder. All reporting requirements, including indicators, budgets, activities, narrative, are submitted through one button.

1. Click the Submit button at the top of the page.



2. A pop-up will appear, prompting the user to confirm their submission, as shown below.



3. Click “Submit”. If the user confirms submission and a required question has been left unanswered, the user will be prevented from submitting and they will be prompted to address the required questions.

4. Once successfully submitted, the submission’s *Status* is updated to “Submitted”.

ⓘ Remember, successfully submitting the response will also lock the submission response from editing.