Submissions

July 2018

Table of Contents

Overview

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

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

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

Submission Template Guide

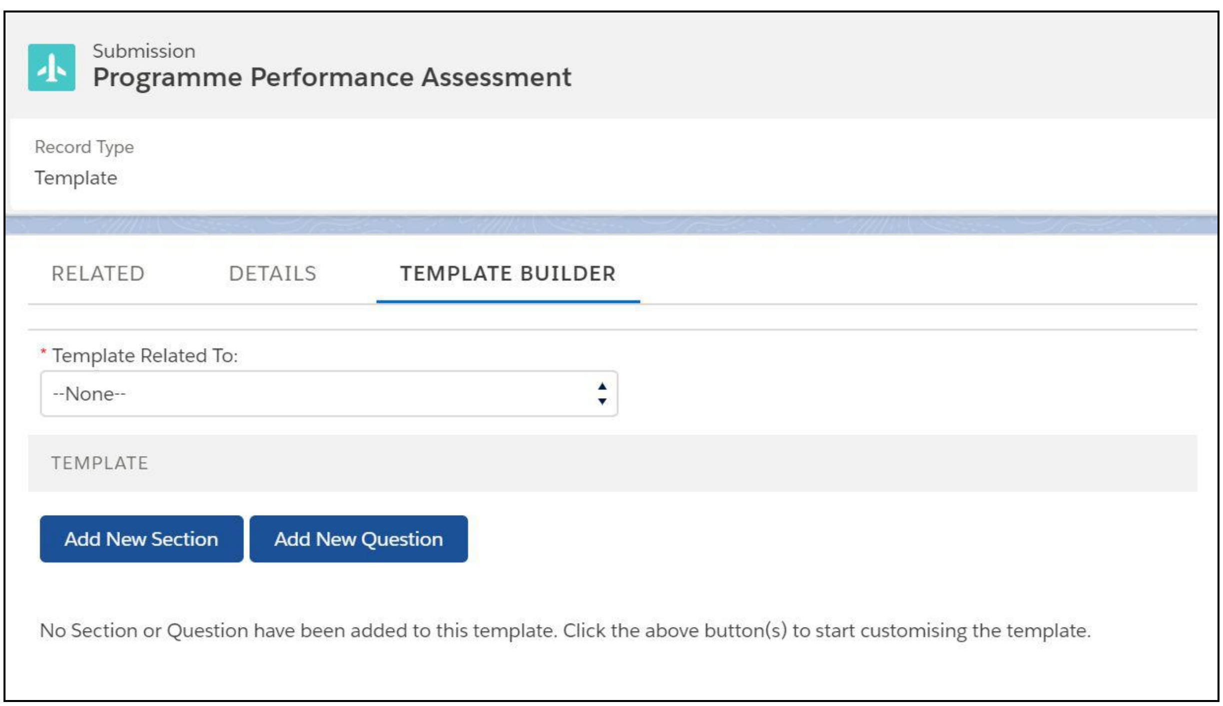
Templates are the master version of a submission, from which submissions can be copied and assigned for completion. They are created and customized through the Submission Template Record Page.

Create and Customize a Submission Template

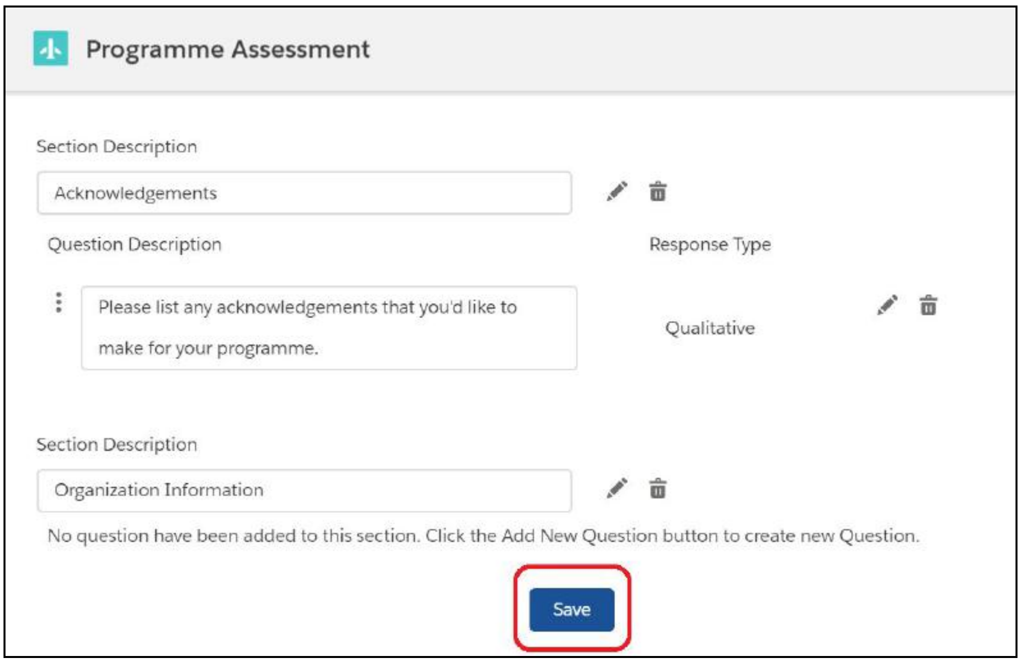
To start using the Submissions feature, you will first create a Submission template. From this template, users can create a Submission record and assign to other users to fill out.

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

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



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

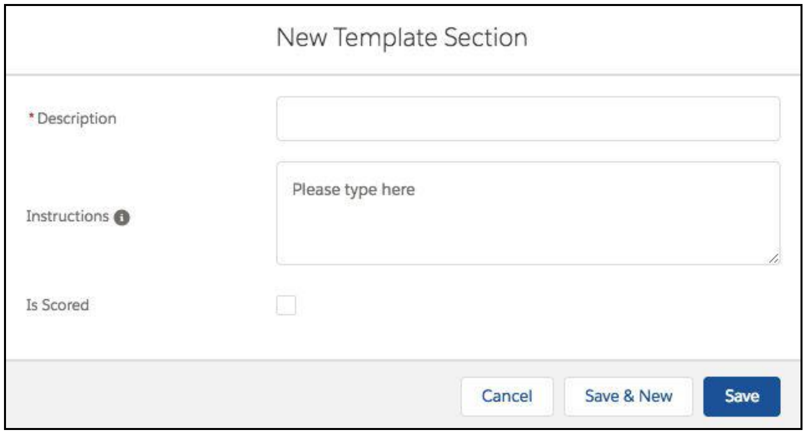


Add Sections to the Template

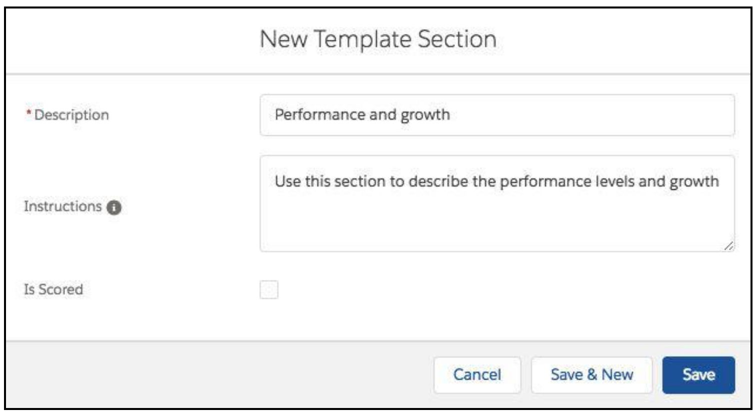
The addition of Sections to a Template is required if users will be viewing *Radar Charts* which display Scores. For unscored Submissions, creating a Section is not required.

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

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

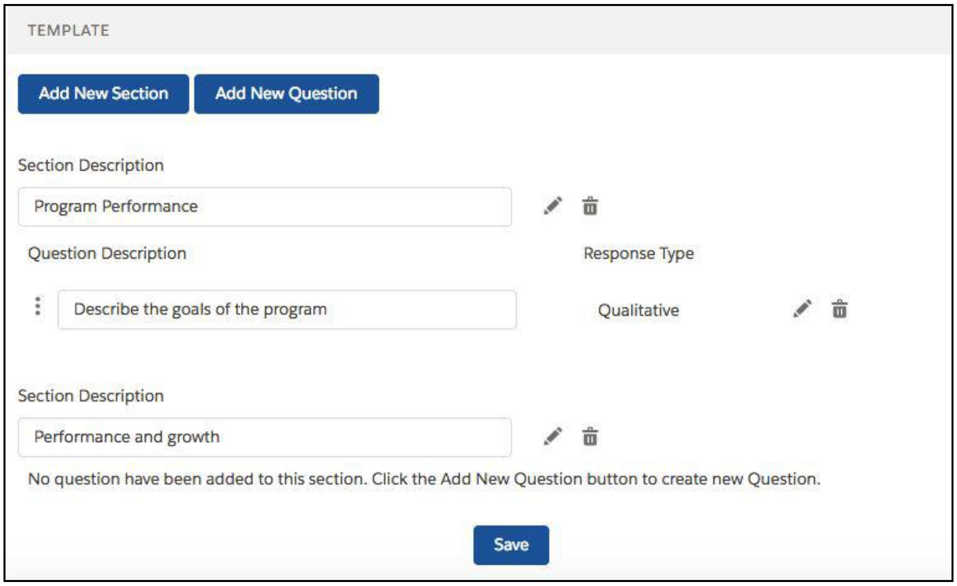


2. In the pop-up, name the Section using the *Description* field.



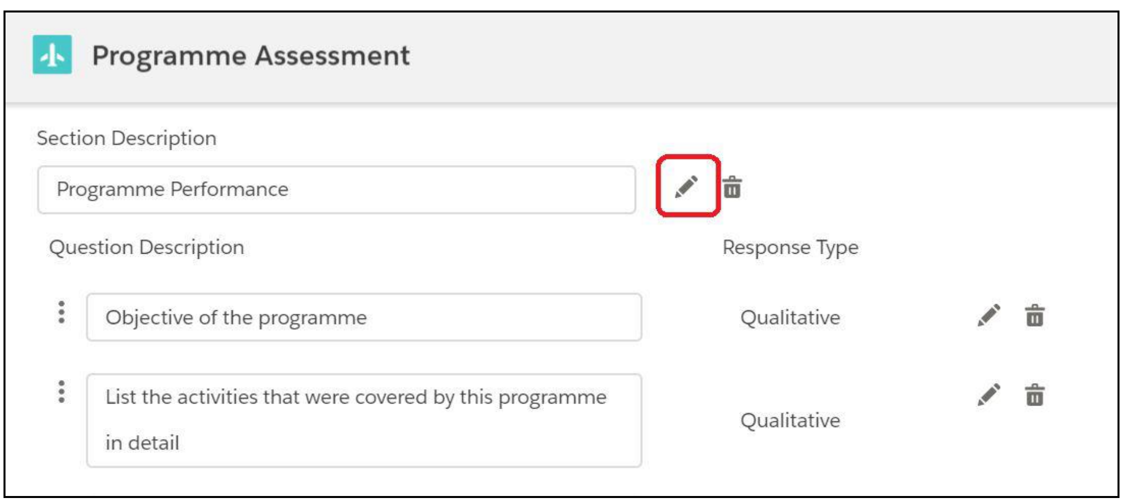
3. (optional) Add instructions or guidelines for the Section in the *Instructions* field.
4. Select whether or not the Section will be scored during the review process with the *Is Scored* field.
5. Click Save or Save & New.

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

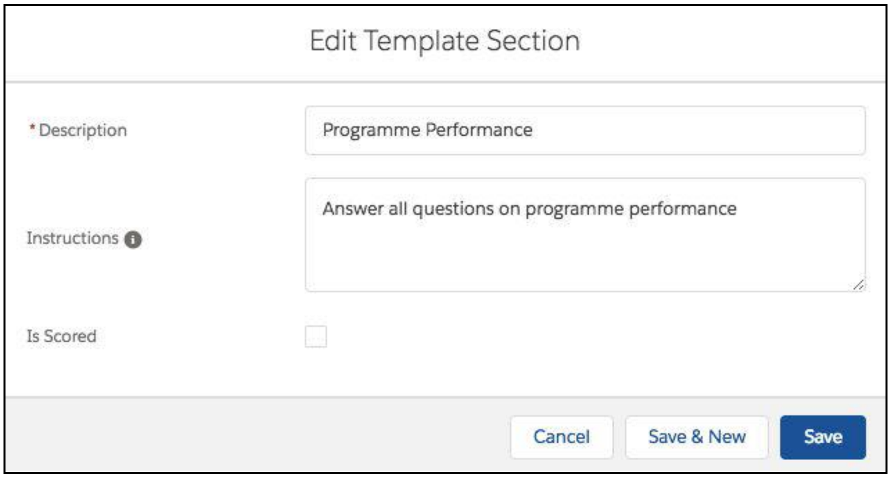


Edit Sections in a Template

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



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



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

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

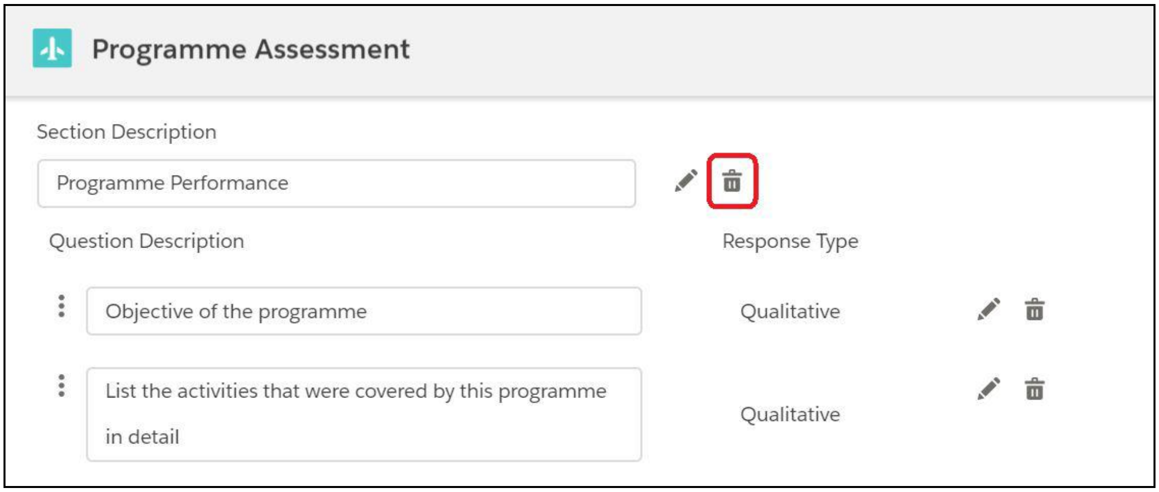
1. Click and hold the text box containing the Section Description.
2. While holding, move the Section row to the desired placement in the Template.
3. Release the Section in the desired placement.
    a. The Section will appear in the new placement, and its ampi__Order__c value will automatically update.
    b. Any subsequent Sections in the Template will shift down a row, and their ampi__Order__c values will also automatically update.
    c. Any Questions in the dropped Section will continue to be displayed under that Section in its new placement.

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

Remove Sections from a Template

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

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



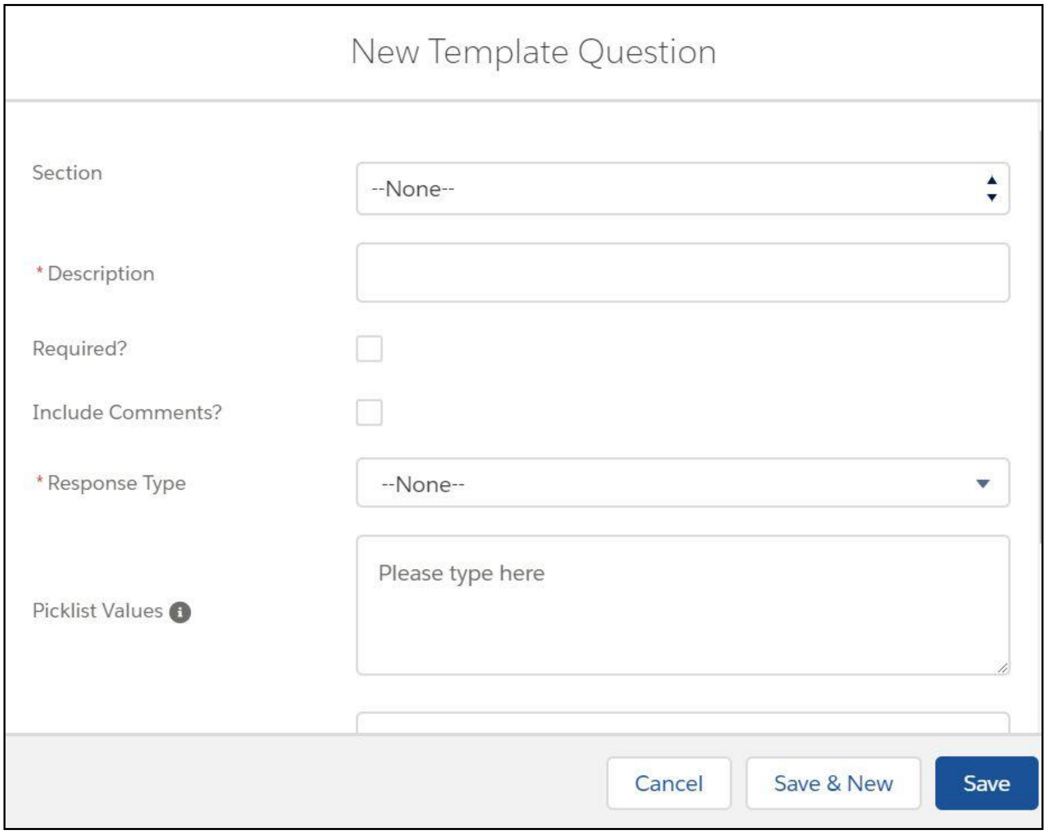
A pop-up will appear requesting the user to confirm the removal. Once the removal is confirmed, then the Section no longer appears in the Template Builder.

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

Add Questions to the Template

Use the Template Builder to add Questions to a template.

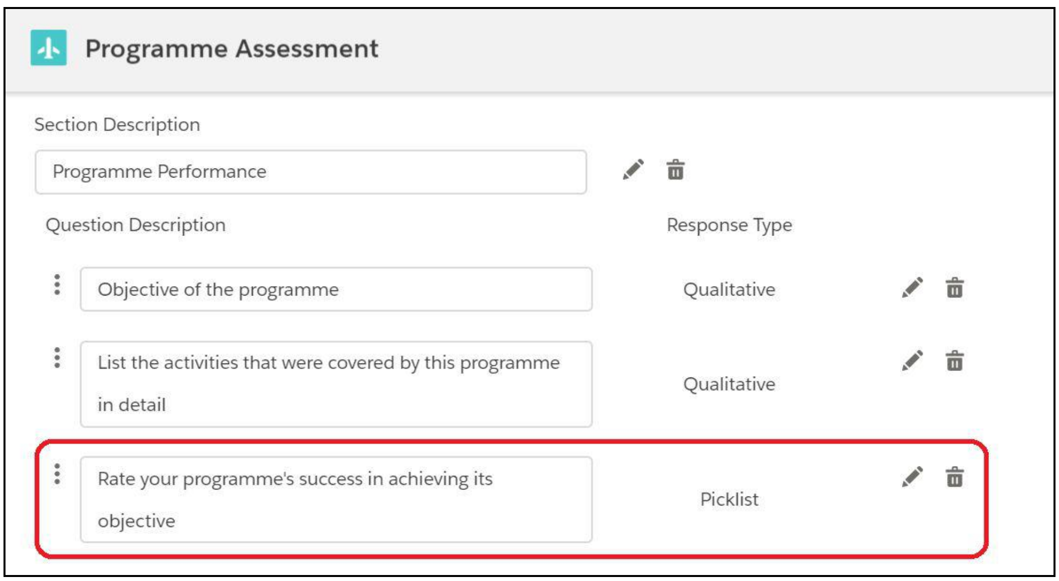
1. Click the Add New Question button. A pop-up will appear.



2. In the pop-up, use the *Description* field to define the Question. Note that this field has a character limit of 255. Any values that exceed this will prevent the Question from being saved successfully.
3. Select how users will respond to the Question in the *Response Type* field:
    a. Qualitative - users will answer by typing into a rich text area.
    b. Picklist - users will answer by selecting from a picklist of pre-defined values. If this is selected, set the pre-defined values by entering them as comma-separated values in the *Picklist Values* field. In the picklist, the values will appear in the order that they are entered in the *Picklist Values* field.
    c. Number - users will answer by typing a number into a text box.
4. Determine whether users are required to respond to this question using the *Required?* field.
5. Determine whether users can add comments to their response with the *Include Comments?* field.
    a. This checkbox cannot be selected if Response Type is set as “Qualitative”.
6. Select whether or not the Question will be scored during the review process with the *Is Scored* field.

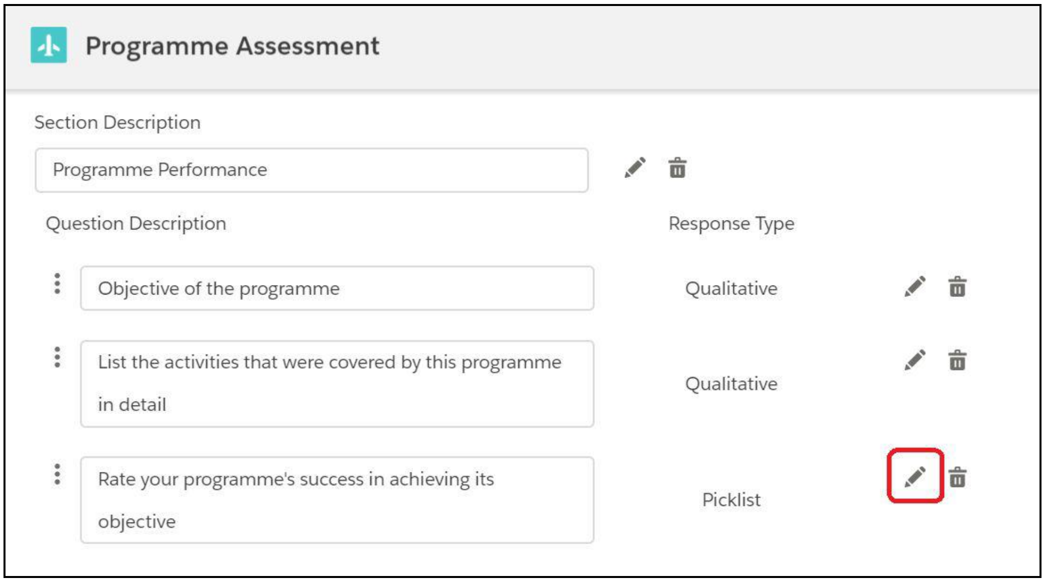
7. (Optional) Select which Section the Question should appear under in the *Section* field.
    a. If no Section is selected, then the Question will appear by default at the top of the template, above all the sections and underneath any other unassigned questions.
    b. If no Section is selected, then a hidden default Section is automatically created as parent to the new Question. If the default Section already exists, then when a Question is created without a selected Section, the new Question is automatically assigned to the existing default Section.
8. Click Save or Save & New.

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

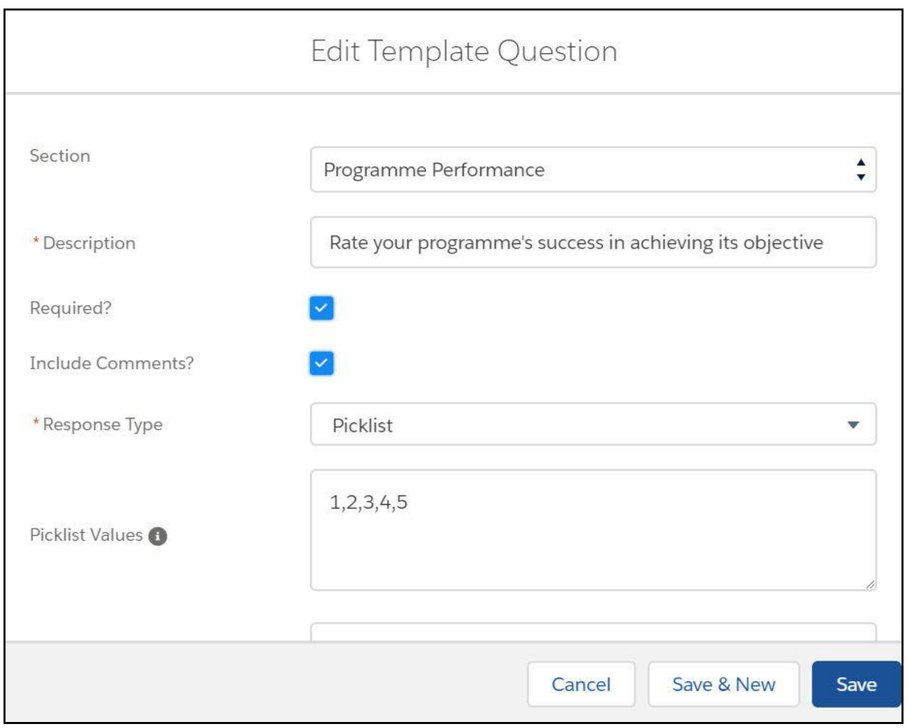


Edit Questions in a Template

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



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

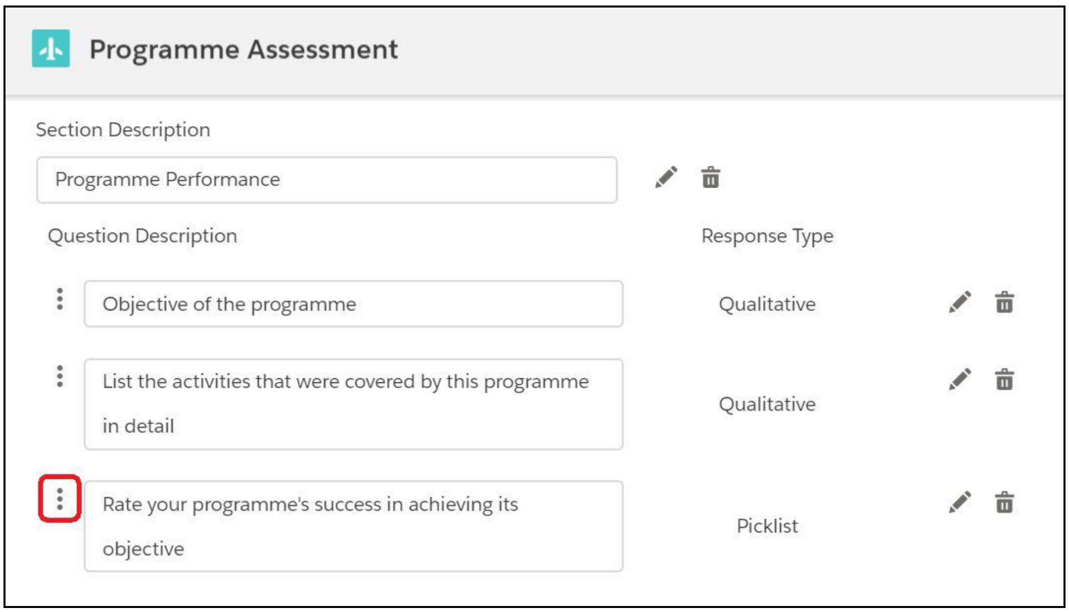


- If the Description was changed, the new value will appear in the Question row on the Template Builder.

- If the Response Type was changed, the new value will appear in the Question row on the Template Builder.
- If the Section was changed, the Question will appear below the new related Section and underneath any Questions that already exist for that Section.

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

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

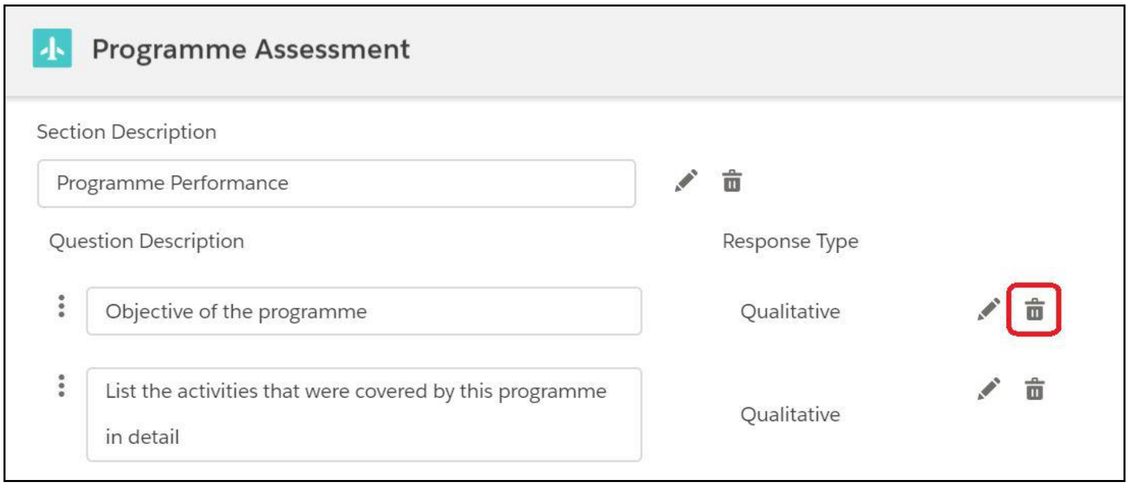


5. While holding, move the Question row to the desired placement. A green bar will display to preview where the Question will be moved.
    a. Questions can only be dragged and dropped within a Section (i.e. A Question cannot be dragged to be in another Section).
    b. If a Question needs to be moved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

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

Remove Questions from a Template

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



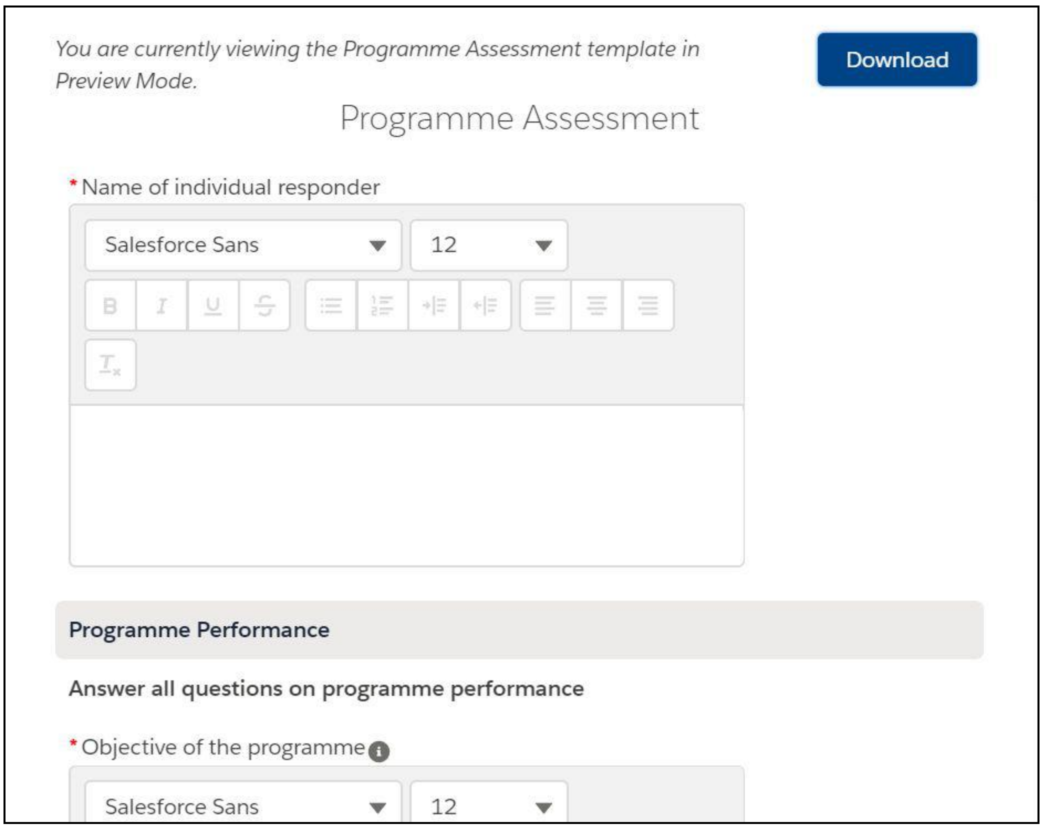
A pop-up will appear requesting the user to confirm the removal. Once the removal is confirmed, then the Question no longer appears as a row in the Template Builder.

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

Preview the Template

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

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

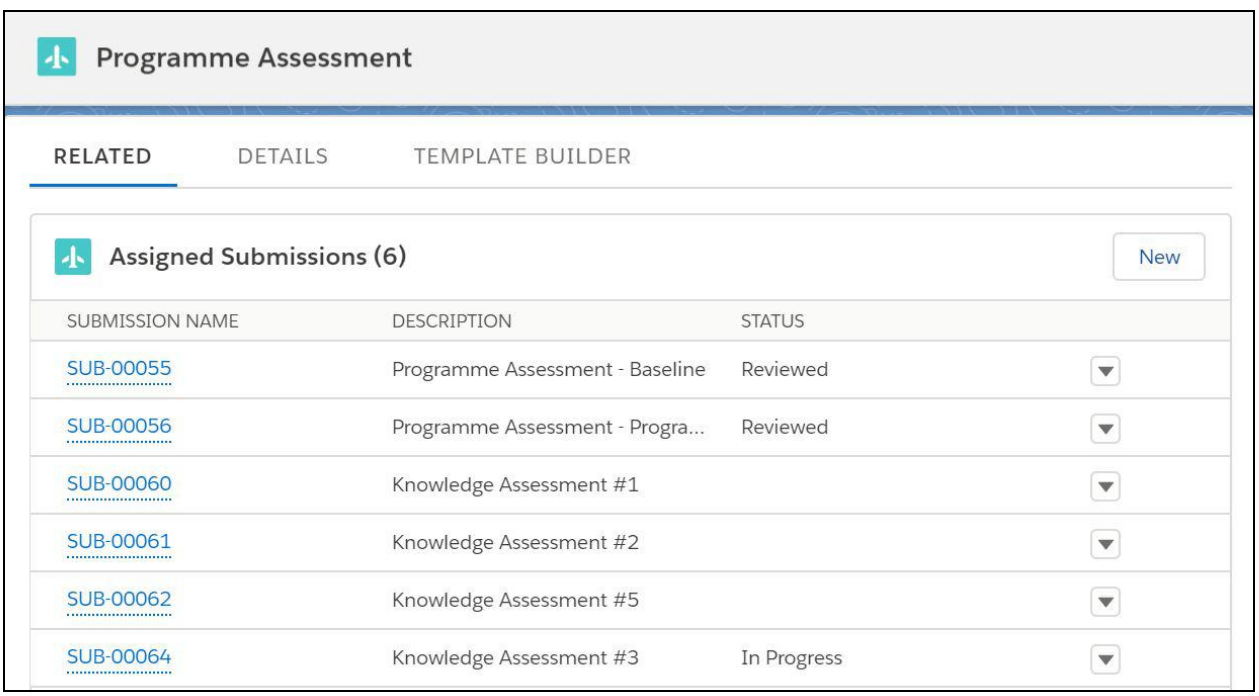


Once the button is clicked and the download is confirmed in the pop-up that follows, the submission template downloads as a Word Document for any offline distribution.

Create and Assign Submissions from the Template

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

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

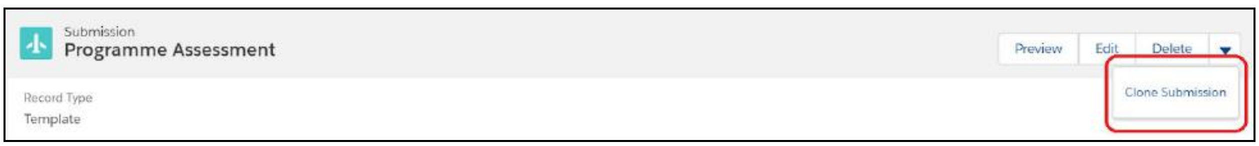


3. Click the New button.
4. When prompted for a record type, select Submission and click Next.
5. Populate the custom lookup field with the record that the Submission will be related to.
6. Fill in any other fields and click Save.

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

Clone the Template

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



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

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

- **ampi__Submission__c**
    - ampi__Description__c
    - ampi__Guidelines__c
    - ampi__Parent_Submission__c
    - ampi__Related_To__c
- **ampi__Section__c**
    - ampi__Active__c
    - ampi__Default__c
    - ampi__Description__c
    - ampi__Instructions__c
    - ampi__Is_Scored__c
    - ampi__Order__c
    - ampi__Parent_Section__c
- **ampi__Question__c**
    - ampi__Active__c
    - ampi__Description__c

- ampi__Include_Comments__c
- ampi__Instructions__c
- ampi__Is_Scored__c
- ampi__Order__c
- ampi__Parent_Question__c
- ampi__Picklist_Values__c
- ampi__Required__c
- ampi__Response_Type__c

Response Guide

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

Fill Out the Submission Response

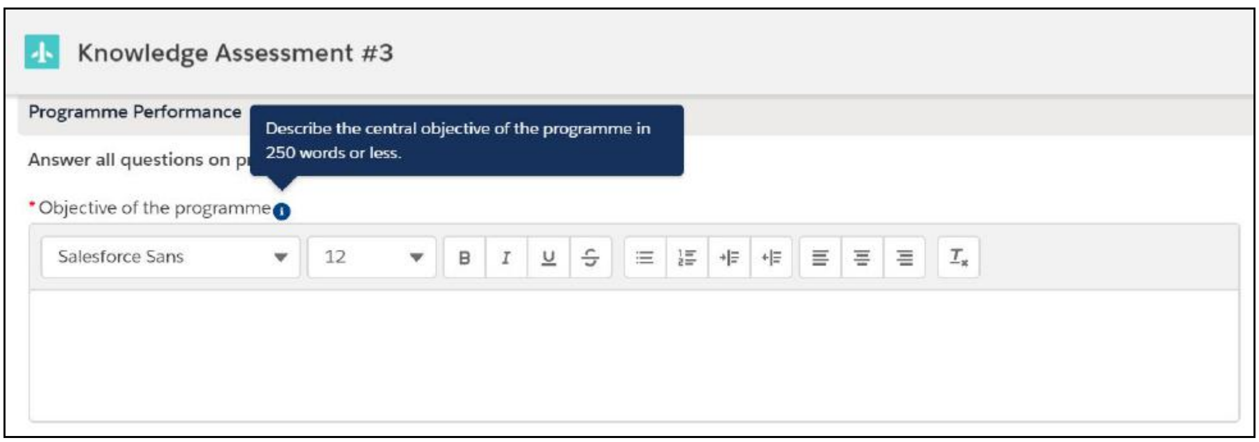
After a submission is created from a template, it is ready for users to answer the questions in the template.

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

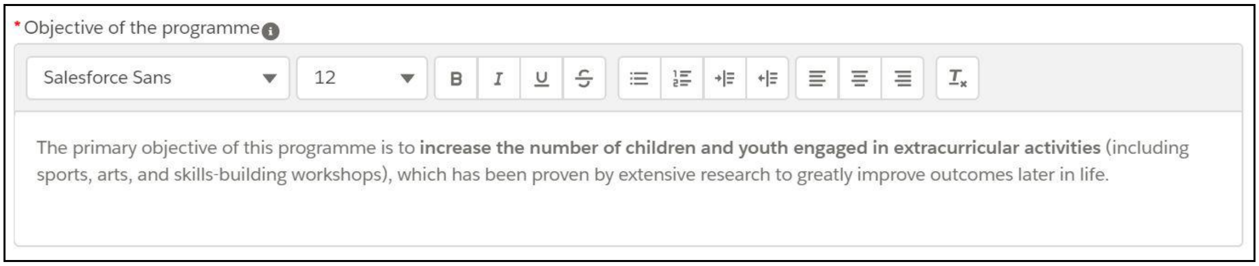
a. If a section has defined instructions (i.e. ampi__Instructions__c is populated on the ampi__Section__c record), those appear directly below the grey bar and above the section's questions.

3. Check if a question is required (i.e. ampi__Required__c is TRUE on the ampi__Question__c record) by noting whether or not it has a red asterisk displayed next to it.

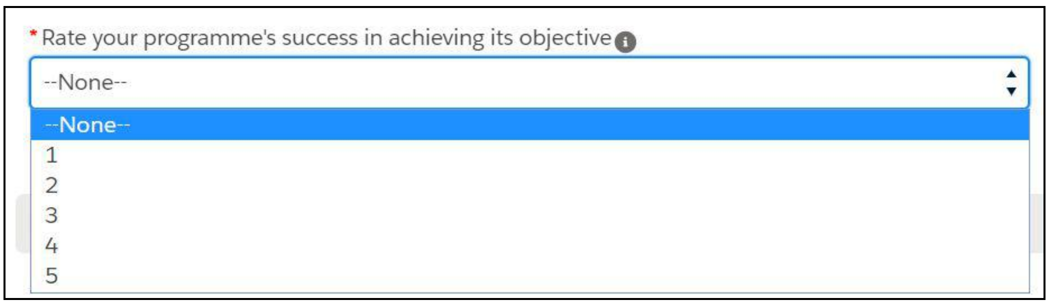
4. Check if a question has any special instructions/criteria (i.e. ampi__Instructions__c is populated on the ampi__Question__c record) by hovering over the info icon to expand the help text.



5. Respond to questions depending on the questions' response types:
    a. Text/Qualitative - users respond in a rich text editor, so they can type any text, insert images and tables, and format their entries as needed
        i. Any qualitative values entered are saved in ampi__Text_Response__c



b. Picklist - users will be able to select a single value from the pre-defined picklist
    i. Any picklist values entered are saved in ampi__Picklist_Response__c



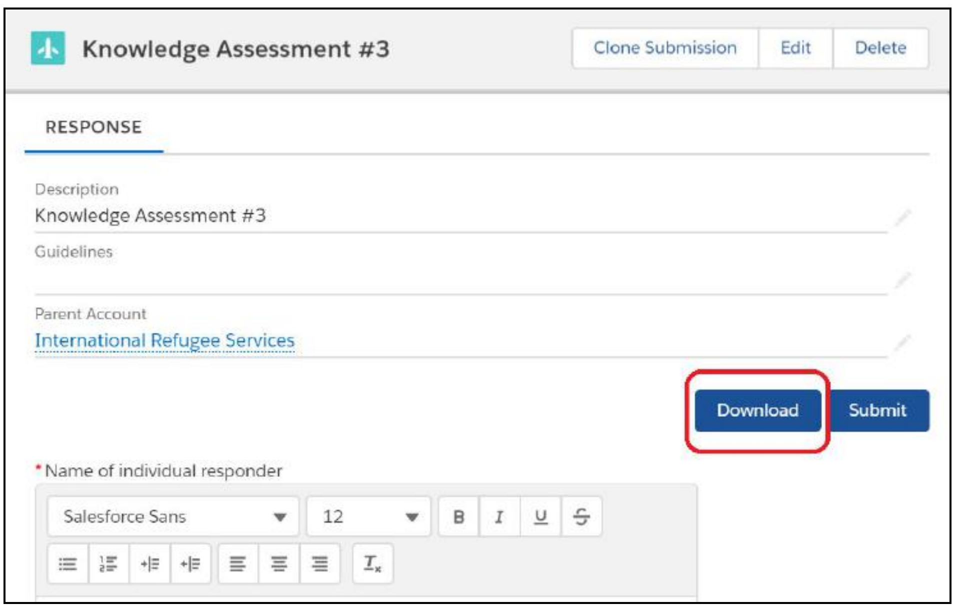
c. Number - users will be able to enter a numeric value with up to 16 digits and 2 decimal places (i.e. 19 total characters)
    i. Any numeric values entered are saved in ampi__Number_Response__c
    ii. If a value entered exceeds the digit or decimal count, an error message will display to the user

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

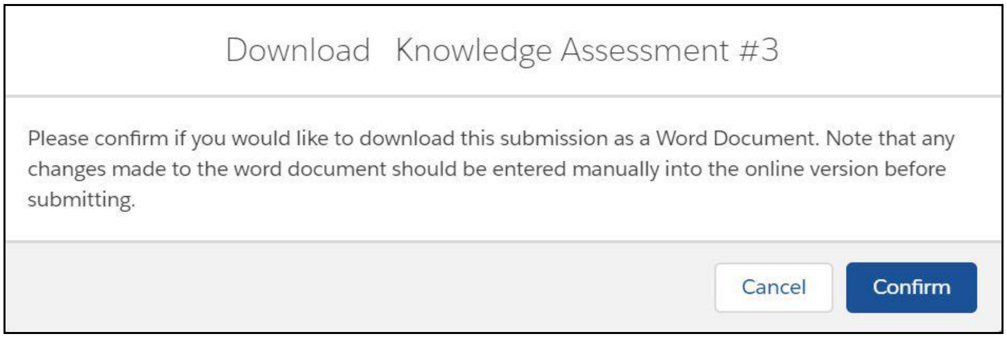
7. Click out of an input cell to save any entered answers. Once the user clicks out of the input cell, the information entered is automatically saved.

Download the Response

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



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

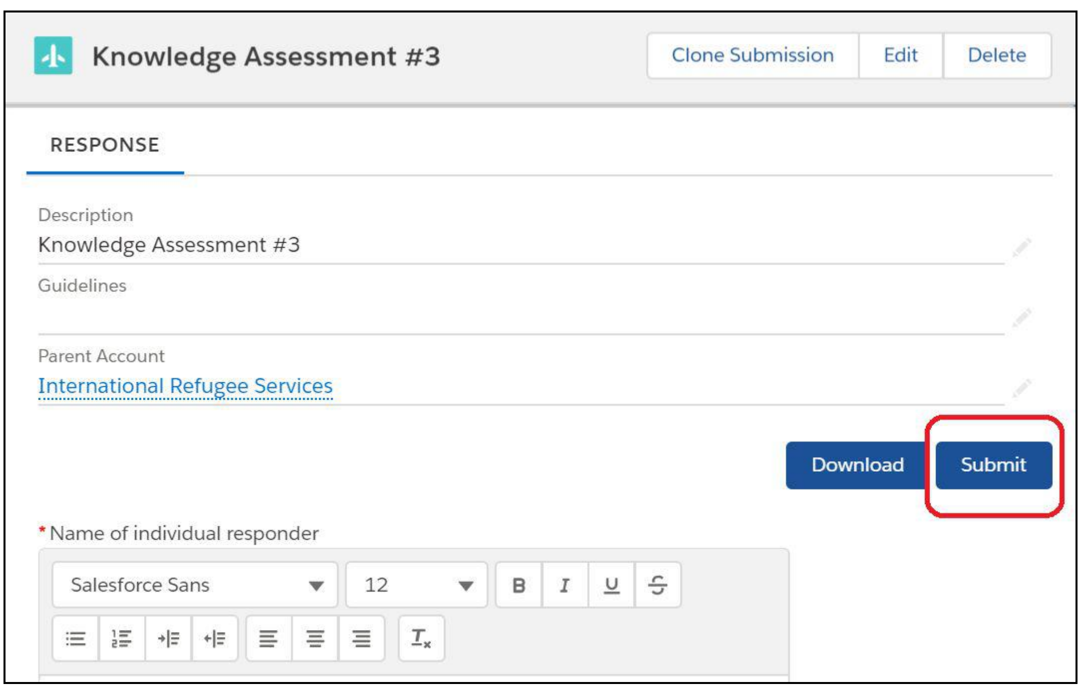


Once the download is confirmed, a Word document version of the submission will download through the user's browser, and they can open the document to view the submission.

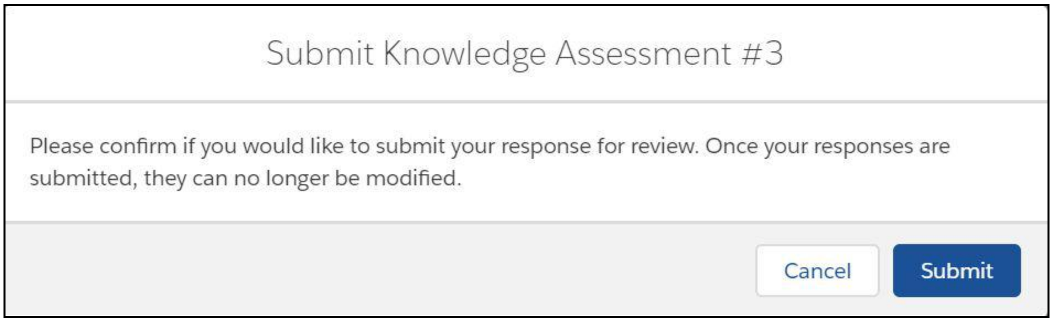
- If any answers have been entered, those will be included below their related questions in the Word document.
- If an answer has not been entered for a question, the question will be displayed with either an input box with placeholder text or the list of picklist options

Submit the Response

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



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

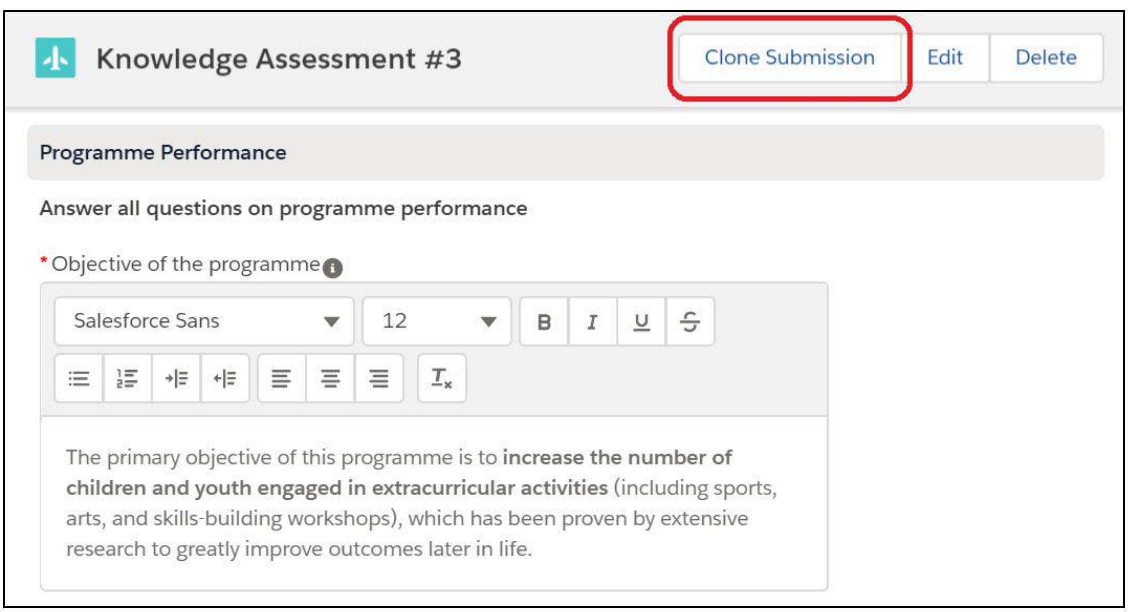


After the user successfully confirms, the submission's *Status* is updated to "Submitted". If the user confirms with a required question that has been left unanswered, the user will be prevented from confirming their submission, and they will be prompted to address the required questions.

If an approval process or workflow rule has been built around the *Status* picklist field to connect it to the *Response Locked* checkbox field, then successfully submitting the response will also lock the submission response from editing.

Clone the Submission

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



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

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

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

Review Guide

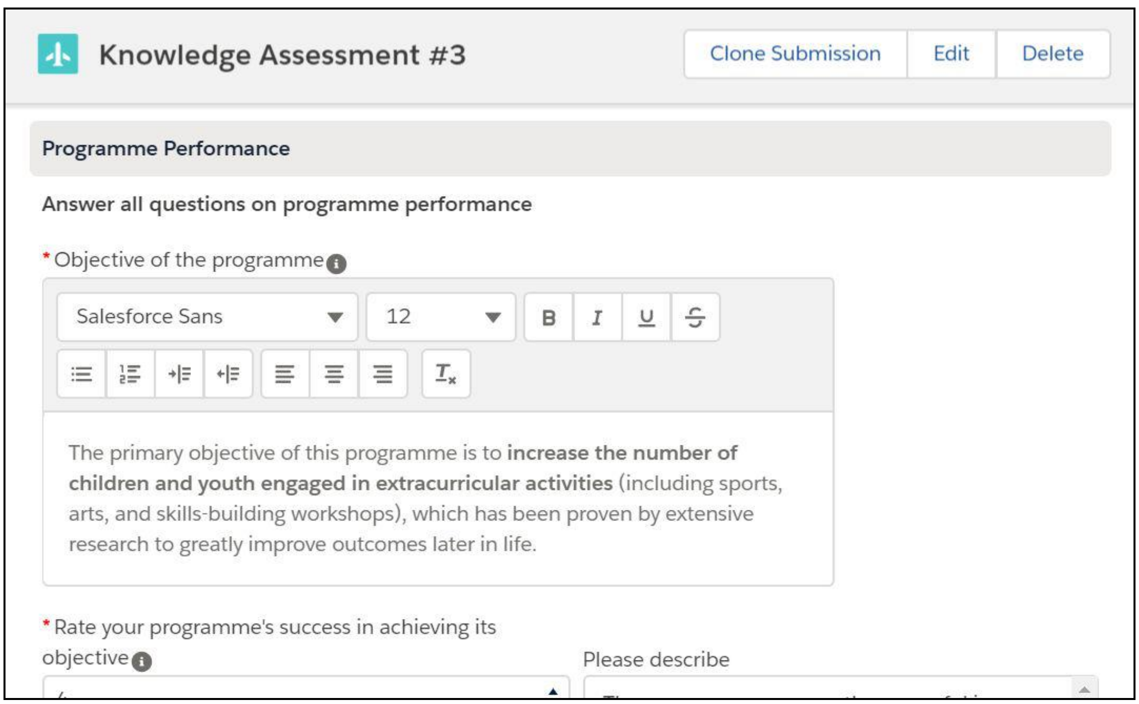
Reviews are the submissions copied from the submission template that have already undergone the response stage and have been submitted for review. (i.e. They are the same record as in the

Response stage, but accessed by different users with different visibility/interfaces.) Reviews are completed through the Submission Review Record Page.

View and/or Modify the Submission Response

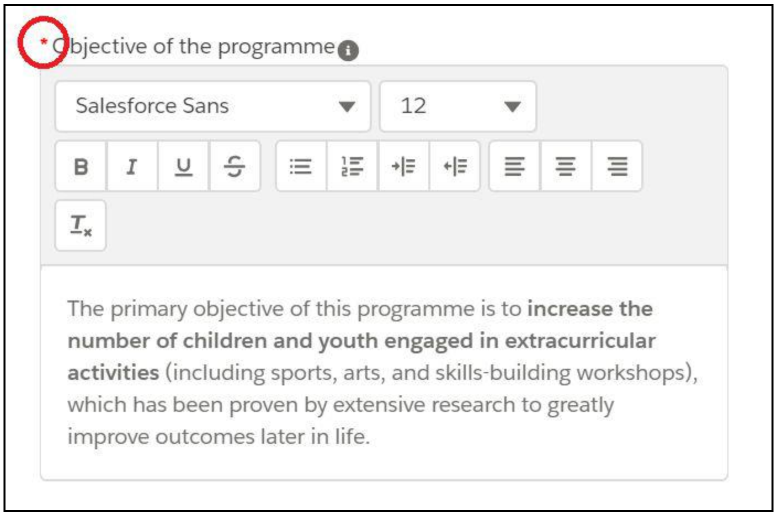
Once a Submission response has been submitted for review, reviewers can open, view, and modify the submitted response.

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

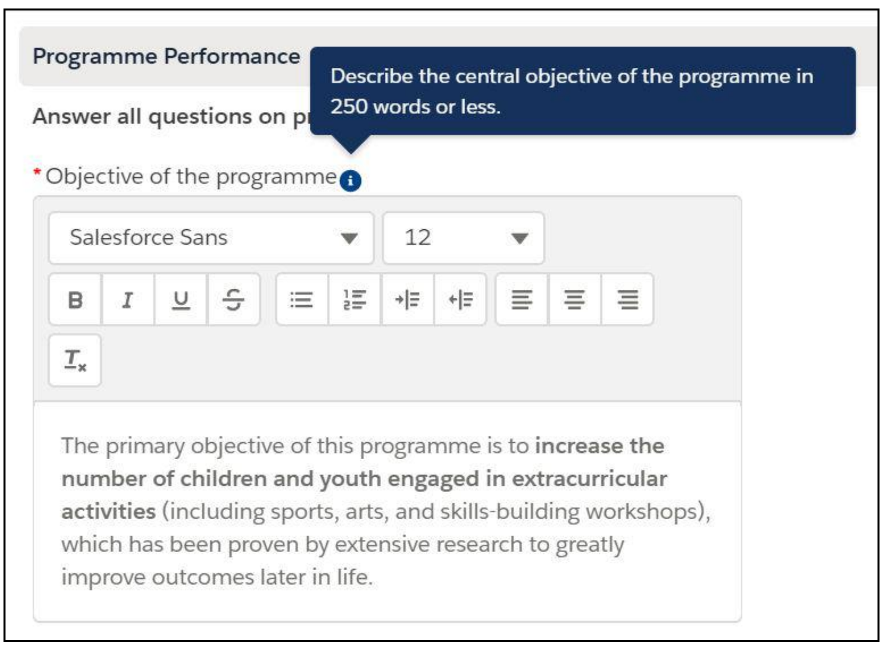


   a. If a section has defined instructions (i.e. ampi__Instructions__c is populated on the ampi__Section__c record), those appear directly below the grey bar and above the section's questions.

4. Check if a question is required (i.e. ampi__Required__c is TRUE on the ampi__Question__c record) by noting whether or not it has a red asterisk displayed next to it.

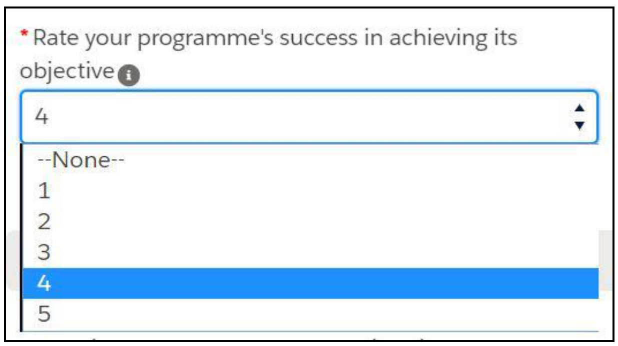


5. Check if a question has any special instructions/criteria (i.e. ampi__Instructions__c is populated on the ampi__Question__c record) by hovering over the info icon to expand the help text.

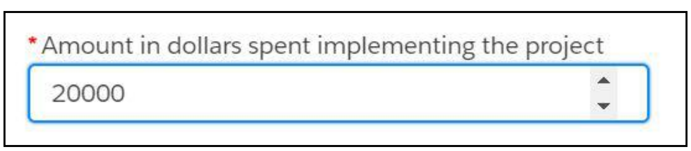


6. View/modify responses to questions depending on the questions' response types:
   a. Qualitative - responses can consist of text, images, and/or formatted tables
      i. Any qualitative values entered or changed are saved in ampi__Text_Response__c

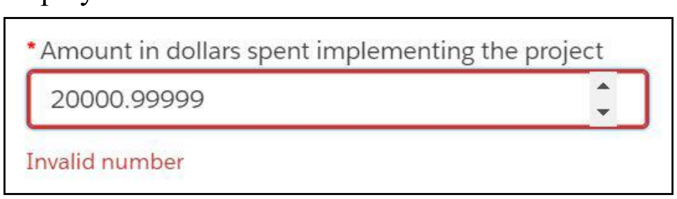
b. Picklist - responses are a single value from the pre-defined picklist
   i. Any picklist values entered or changed are saved in ampi__Picklist_Response__c



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



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



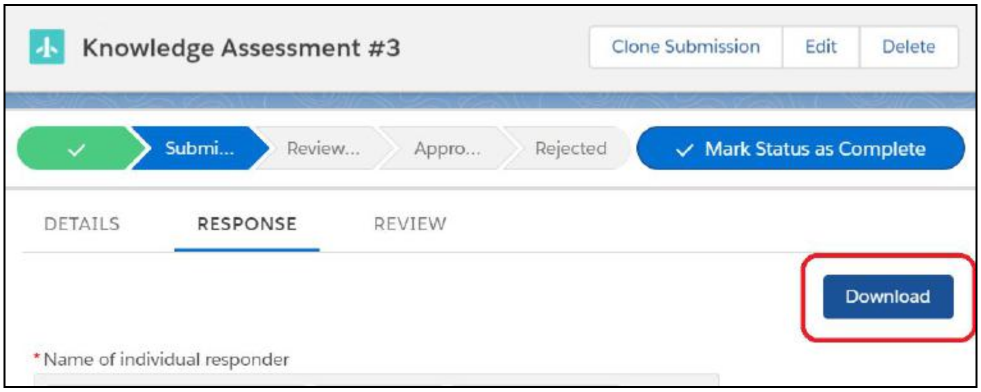
7. View/modify comments or explanations to picklist or number answers.
    a. Some picklist or number responses have an added comment. Users will be able to type directly into a text input box displayed next to the picklist or number input box to modify that information.
    b. Any comments entered or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

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

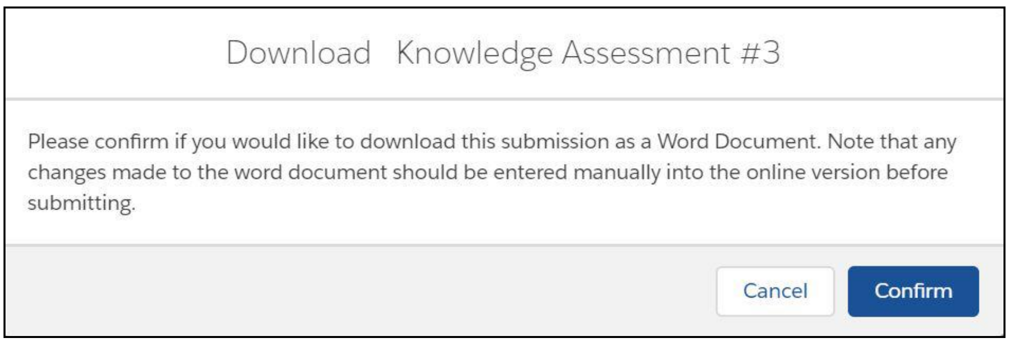
The reviewing users ability to view or modify the response depends on the permissions that have been set for them on the Question object. For example, if the user has read-only access on the ampi__Picklist_Response__c, ampi__Number_Response__c, and ampi__Qualitative_Response__c fields, then the component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

Download the Submission Response

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



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



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

Assign Scores to Answers in a Submission Review

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

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

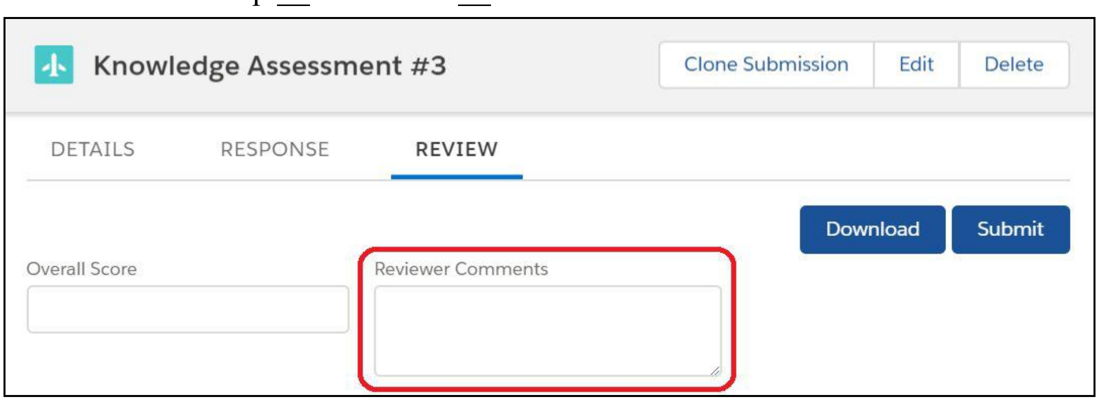
a. The Overall Score field is displayed at the top of the component, into which reviewers can directly enter a value with up to six whole number digits and one decimal value (i.e. total of eight characters, including the decimal marker).

i. The number value entered is saved in ampi__Overall_Score__c on the ampi__Submission__c record.

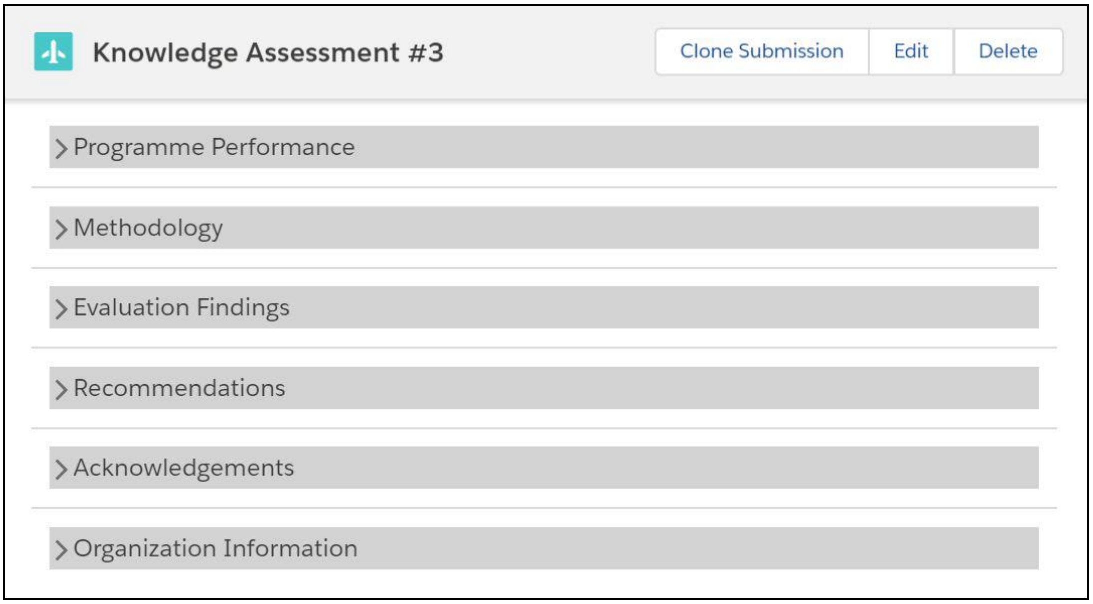
ii. If the value entered exceeds the digit or decimal count, an error message will display to the user

b. The Reviewer Comments field is displayed next to the Overall Score field at the top of the component. Reviewers can directly enter a text value to provide additional context to the score assigned to the submission.

i. The text value entered is saved in ampi__Reviewer_Comments__c on the ampi__Submission__c record.

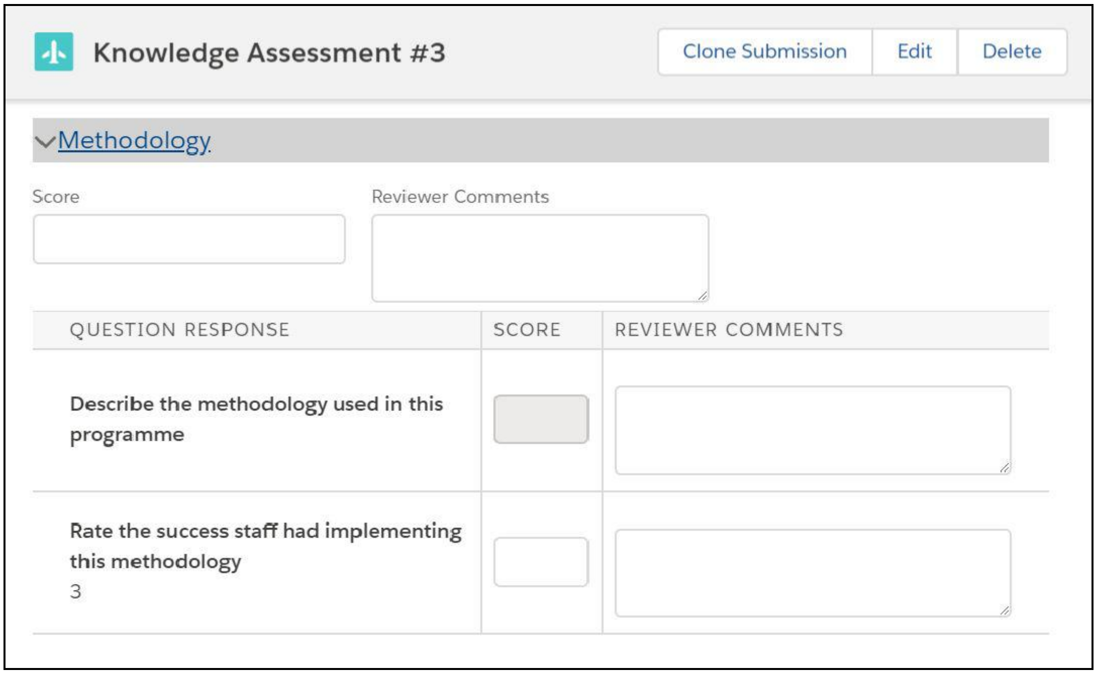


4. If no automation is set up, assign overall scores to sections.
    a. If the submission is divided into sections, each section will appear in a horizontal grey bar, with their related questions listed below.



    b. By default, all sections are collapsed, and their related questions are hidden. Expand a section and display its related questions by clicking on the section's grey bar. Only one section can be displayed at a time, and it can only be collapsed by expanding another section.

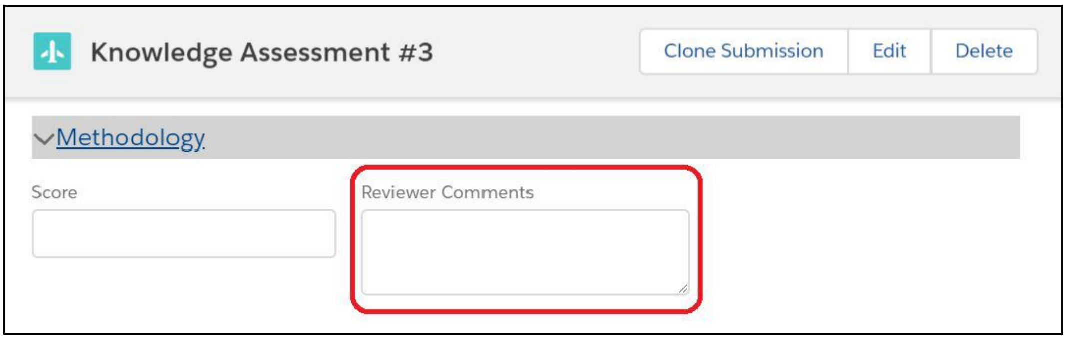
Amp Impact



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.

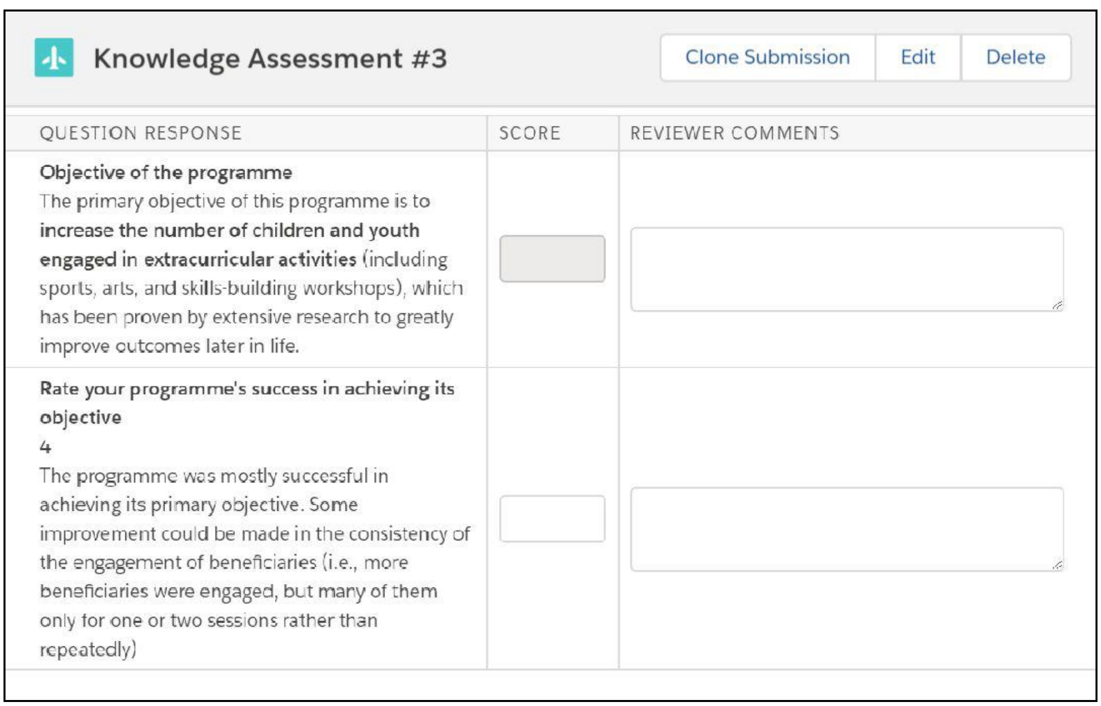
d. The Reviewer Comments field is displayed next to the Overall Score field at the top of the component. Reviewers can directly enter a text value to provide comments on the submitted Section.

   i. The text value entered is saved in ampi__Reviewer_Comments__c on the ampi__Section__c record.



5. Assign scores to individual answers in the Scores component.

   a. For each section in the submission, a table with three columns will display below the section header for reviewers to score answers.



      i. Question Response: Contains the following field values on ampi__Question__c listed vertically

         1. ampi__Description__c

2. ampi__Text_Response__c, ampi__Picklist_Response__c, OR ampi__Number_Response__c (depending on the value selected in ampi__Response_Type__c)
3. ampi__Text_Response__c (only if comments have been entered for picklist or number responses)

ii. Score: Contains input boxes into which reviewers can assign a score to the question response
1. Reviewers can directly enter a value with up to six whole number digits and one decimal value (i.e. total of eight characters, including the decimal marker).
2. If the value entered exceeds the digit or decimal count, an error message will display to the user.
3. The number value entered is saved in ampi__Score__c on the ampi__Question__c record.
4. If ampi__Is_Scored__c is FALSE, then the input field for entering scores will be greyed out and locked from editing.

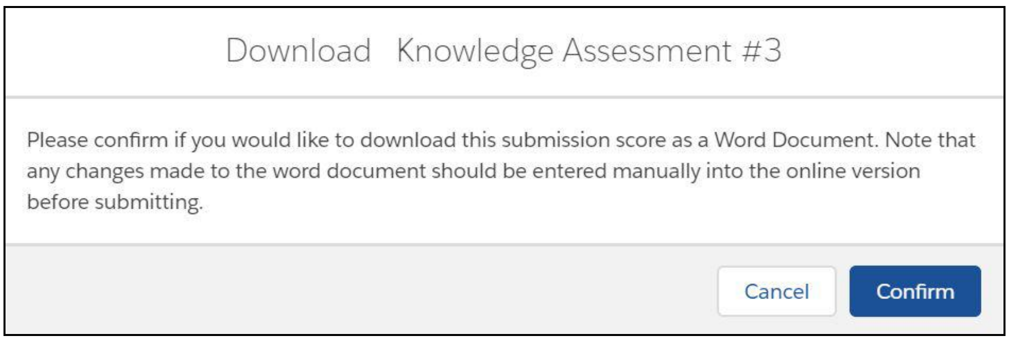
iii. Reviewer Comments: Contains input boxes into which reviewers can add comments on the submitted Answer.
1. The text value entered is saved in ampi__Reviewer_Comments__c on the ampi__Question__c record.

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

Download Scores for Review

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

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



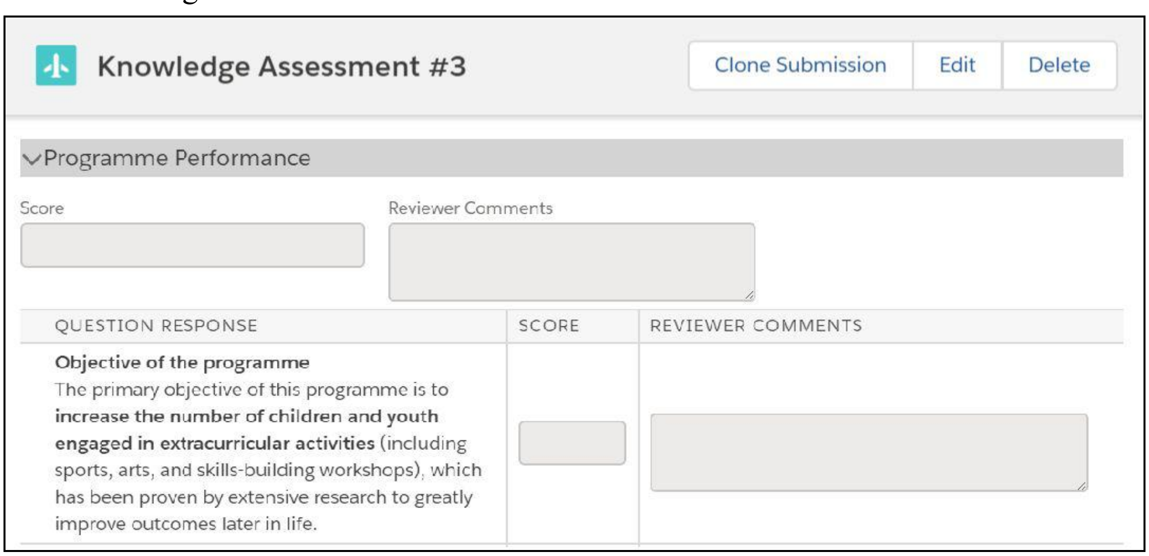
- Overall Score and Reviewer Comments for the entire submission are printed at the top of the Word document, underneath the header.
- Section Score and Reviewer Comments fields are displayed below the relevant Section (and its instructions, if any exist).
    - If ampi__Is_Scored__c on the Section is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

Submit the Final Submission Review

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

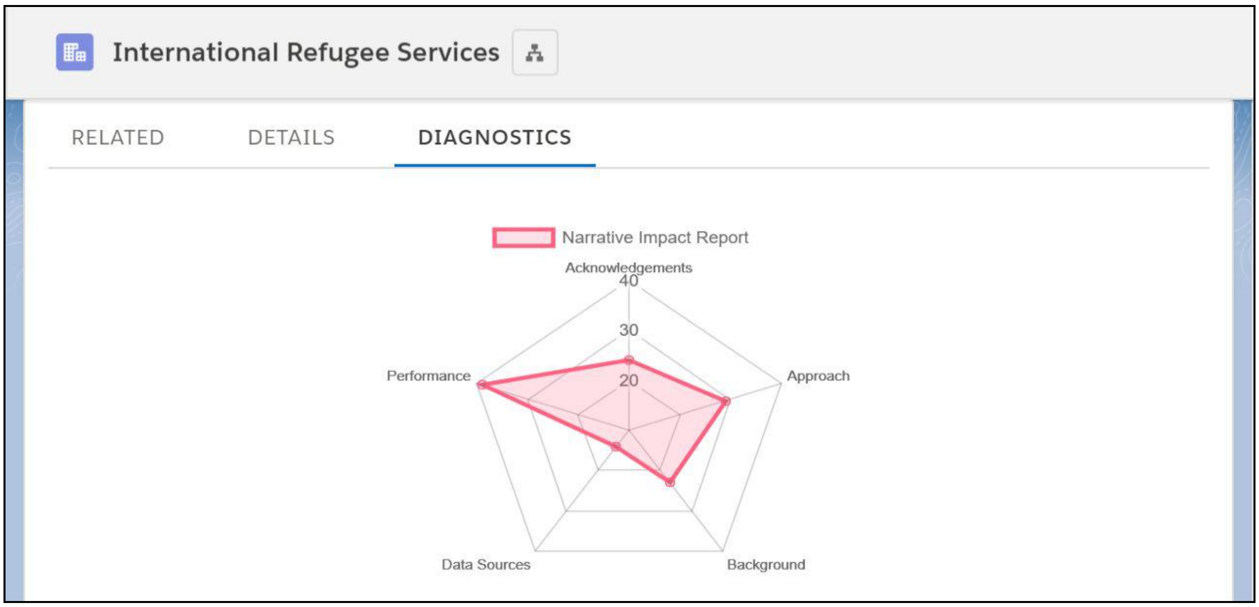
There is no validation checking that all Score values have been filled out, so Reviewers can submit their reviews successfully even if they have left any of the Scores or Comments blank.

If an approval process or workflow rule has been built around the ampi__Status__c picklist field to connect it to the ampi__Review_Locked__c checkbox, then submitting will also lock the scores from editing.

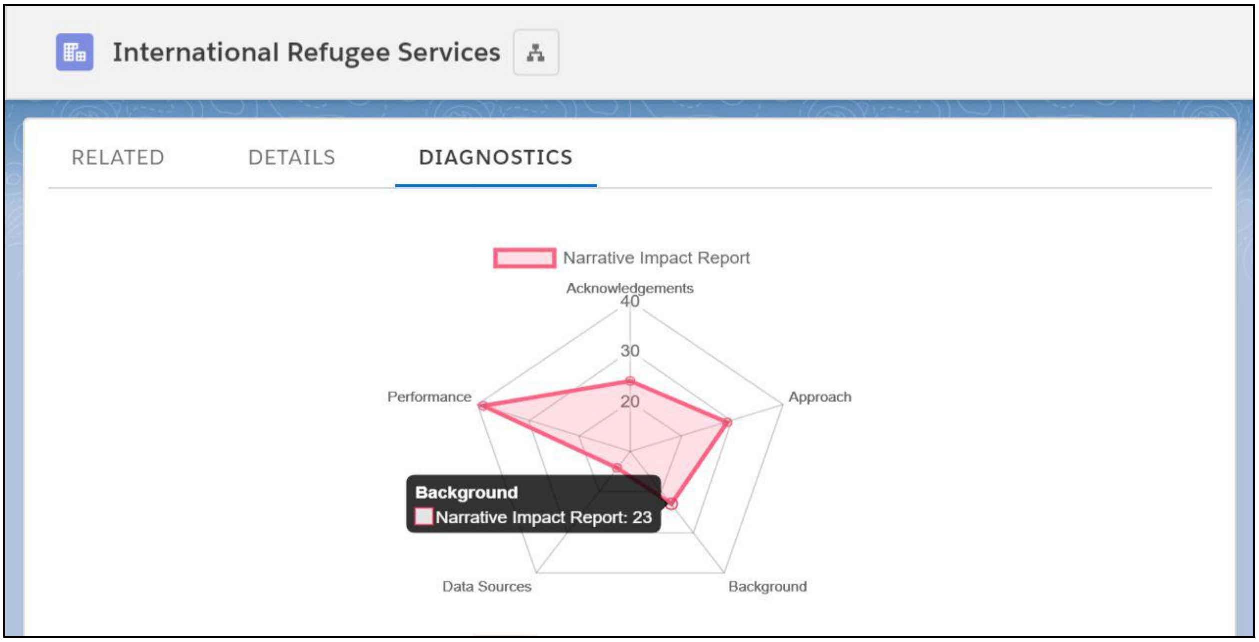


View Radar Charts

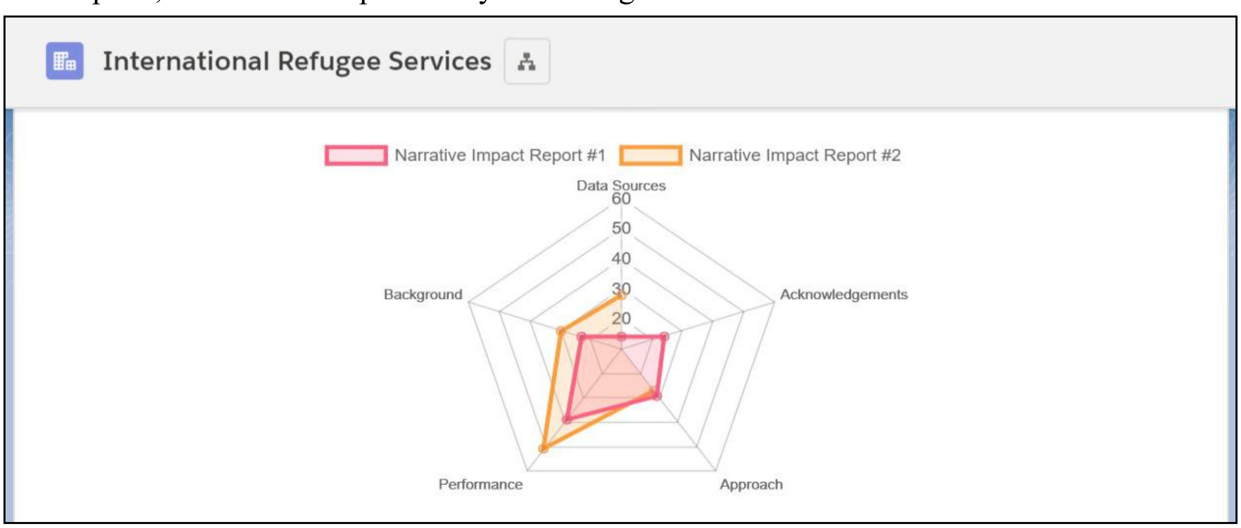
As soon as at least one submission with sections has been scored, the radar chart component will become visible on the submission's parent record.
NOTE - The user's access to this component depends on how the System Admin has configured the parent object's Lightning record page while setting up the Submissions feature.



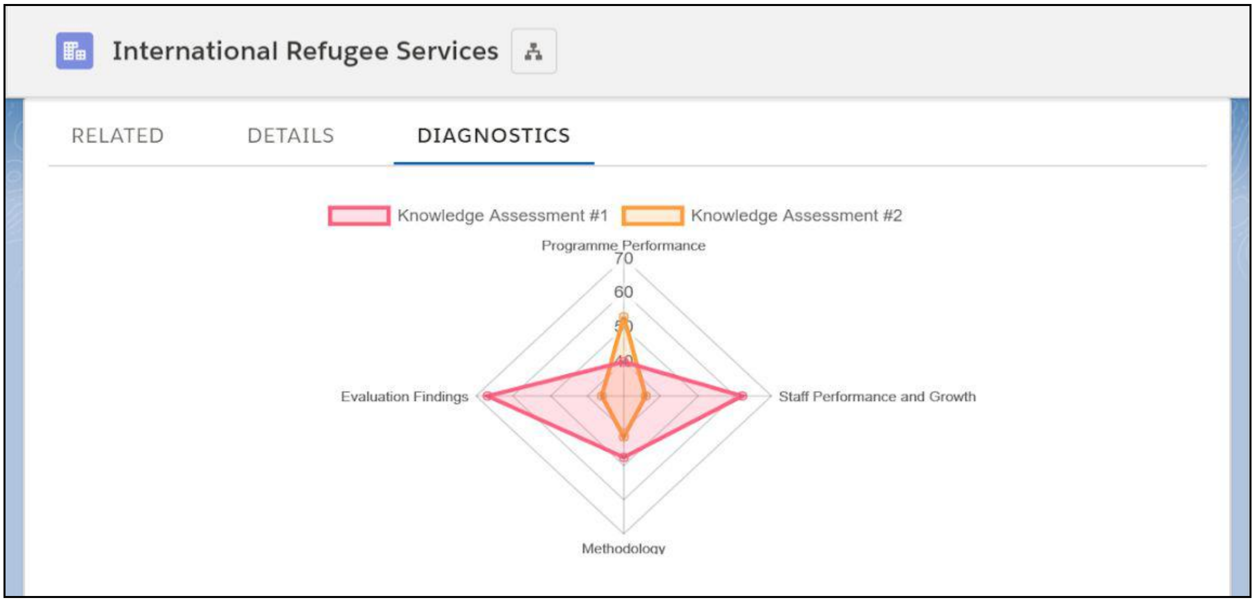
Each corner of the displayed radar chart represents and is labeled by the sections on the submission. Each mapped point on the radar chart represents a ampi__Score__c value on the ampi__Section__c that is displayed. The scale of the radar chart dynamically renders based on the minimum and maximum score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



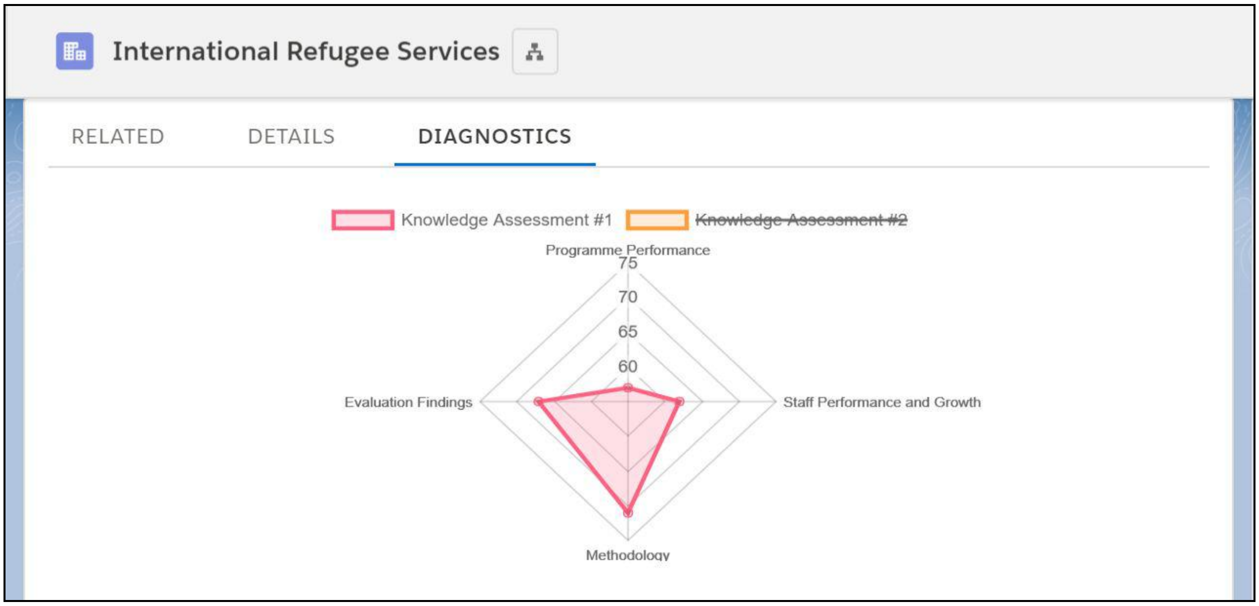
As long as a section has been added to the Template, it will display in the radar chart, even if the section has since been removed from the template.
For example, the Narrative Impact Report template is originally created with an Acknowledgements section. The template is copied to create submissions,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



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



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



If multiple submissions created from different templates have been assigned to the same parent record, multiple radar charts are displayed in a column - one radar chart per original template.