

Submissions User Guide

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Overview

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

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

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

Submission Template Guide

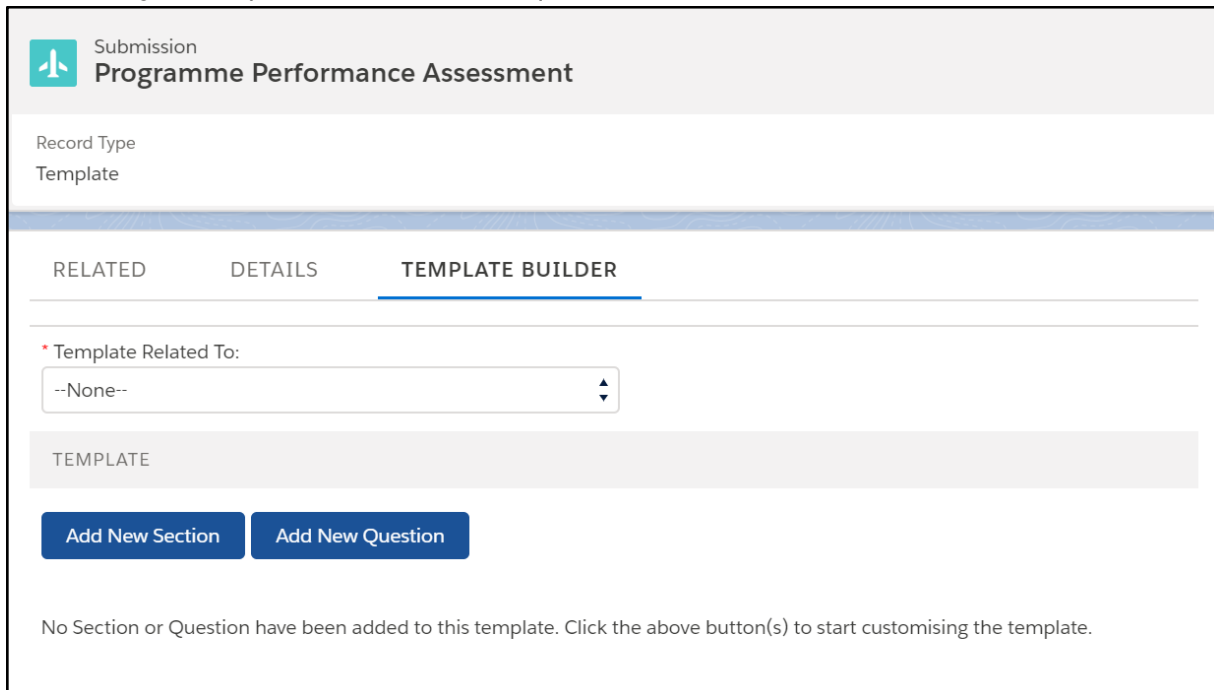
Templates are the master version of a submission, from which submissions can be copied and assigned for completion. They are created and customized through the Submission Template Record Page.

Create and Customize a Submission Template

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

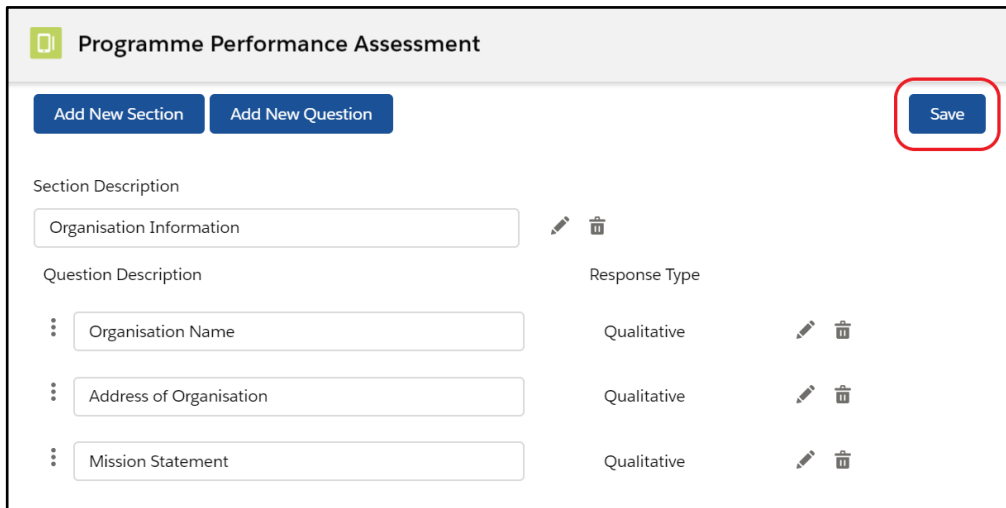
1. Open the Submissions tab.
2. Click *New* to create a new Submission record.
3. When prompted for a Record Type, select *Template*.
4. Name the Template using the Description field. Set Guidelines if needed to provide instructions / helpful guidelines.

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



The screenshot shows the 'Submission Template Builder' interface for a record titled 'Programme Performance Assessment'. The record type is 'Template'. The interface has three tabs: 'RELATED', 'DETAILS', and 'TEMPLATE BUILDER', with 'TEMPLATE BUILDER' being the active tab. Below the tabs, there is a dropdown menu labeled '* Template Related To:' with the value '--None--'. Underneath, there is a section header 'TEMPLATE' and two buttons: 'Add New Section' and 'Add New Question'. At the bottom, a message states: 'No Section or Question have been added to this template. Click the above button(s) to start customising the template.'

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

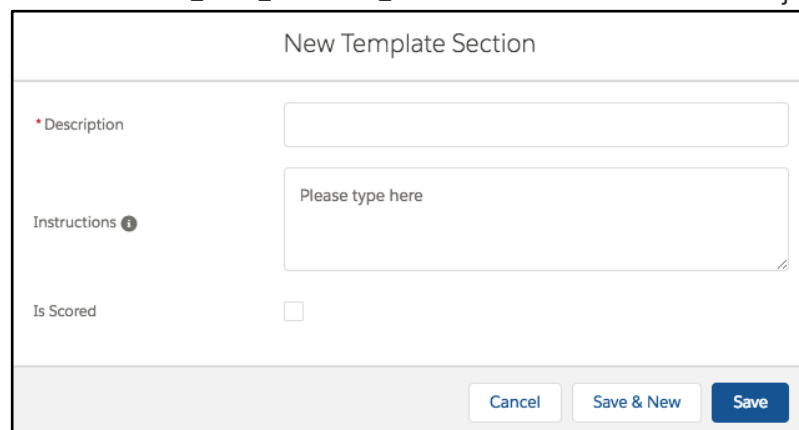


Add Sections to the Template

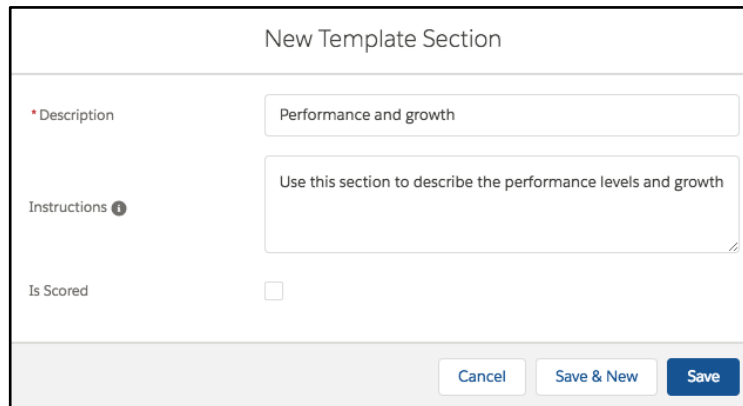
ⓘ The addition of Sections to a Template is required if users will be viewing Radar Charts which display Scores. For unscored Submissions, creating a Section is not required.

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.

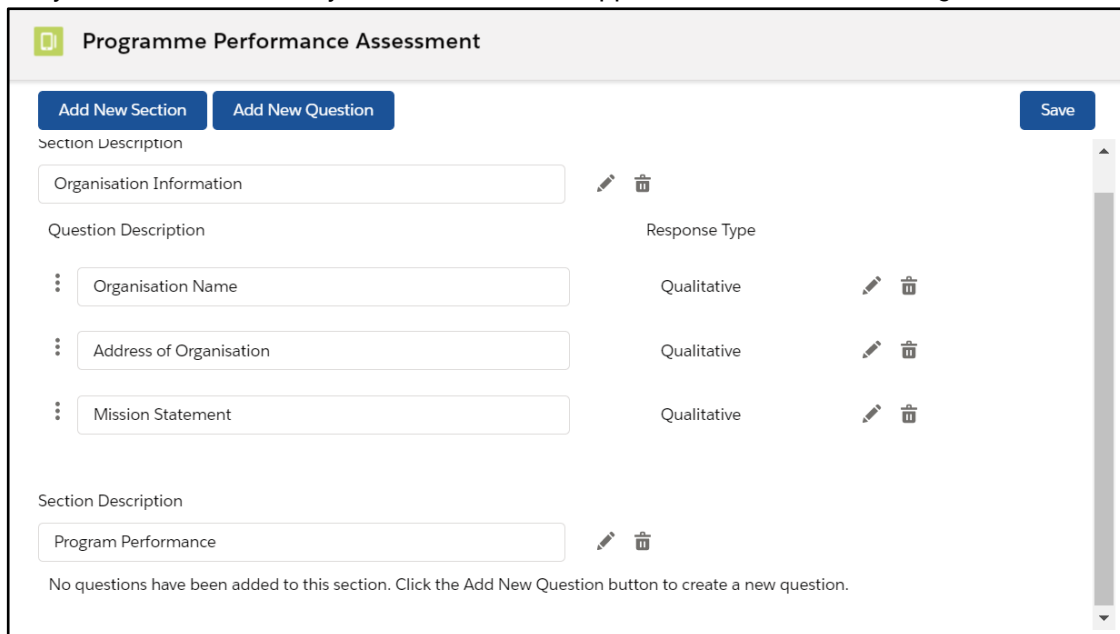


2. In the pop-up, name the Section using the *Description* field.



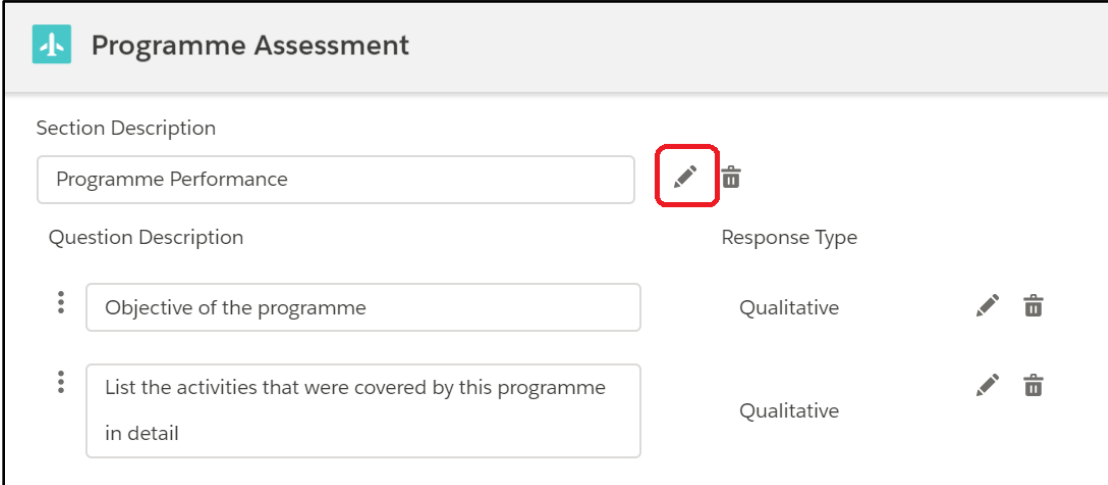
3. (optional) Add instructions or guidelines for the Section in the *Instructions* field.
4. Select whether or not the Section will be scored during the review process with the *Is Scored* field.
5. Click Save or Save & New.







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.



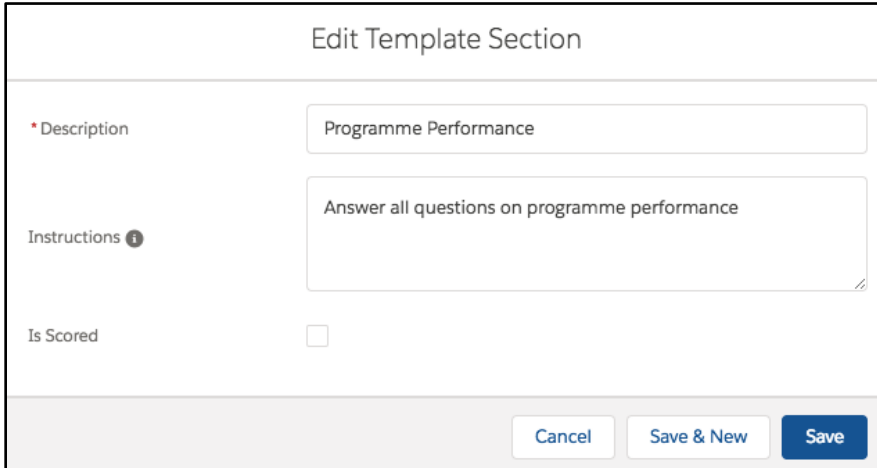
Edit Sections in a Template

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.




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

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.



Edit Template Section

* Description

Instructions 

Is Scored

- 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 have 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.

 **Programme Assessment**

Section Description

Programme Performance

Question Description	Response Type	
⋮ <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;">Objective of the programme</div>	Qualitative	 
⋮ <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;">List the activities that were covered by this programme in detail</div>	Qualitative	 

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

Delete

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

Cancel
Delete

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

Add Questions to the Template

Use the Template Builder to add Questions to a template.

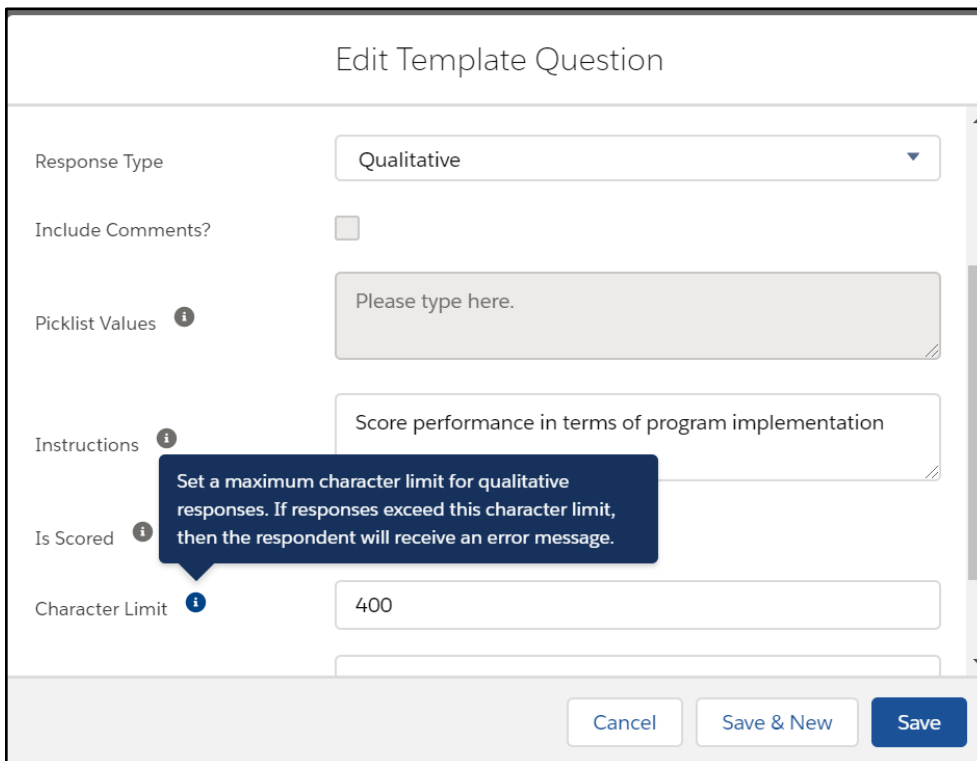
1. Click the Add New Question button. A pop-up will appear.

New Template Question

Section	<input type="text" value="--None--"/>
* Description	<input type="text"/>
Required?	<input type="checkbox"/>
Include Comments?	<input type="checkbox"/>
* Response Type	<input type="text" value="--None--"/>
Picklist Values ⓘ	<div style="border: 1px solid #ccc; padding: 5px; min-height: 40px;">Please type here</div>

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 editor.
 - b. Short Text - users will answer by typing into a text field.
 - c. 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.
 - d. Multi-select picklist - users will answer by selecting *multiple* values from a picklist of pre-defined values. If this is selected, set the pre-defined values by entering them as comma-

- separated values in the *Picklist Values* field. In the picklist, the values will appear in the order that they are entered in the *Picklist Values* field.
- e. Number - users will answer by typing a number into a text box.
 - f. Date - users will answer by selecting a date from a datepicker component.
4. Determine whether users are required to respond to this question using the *Required?* field.
 5. Determine whether users can add comments to their response with the *Include Comments?* field.
 - a. This checkbox cannot be selected if Response Type is set as “Qualitative”.
 6. Select whether or not the Question will be scored during the review process with the *Is Scored* field.
 7. (Optional) Select which Section the Question should appear under in the *Section* field.
 - a. If no Section is selected, then the Question will appear by default at the top of the template, above all the sections and underneath any other unassigned questions.
 - b. If no Section is selected, then a hidden default Section is automatically created as parent to the new Question. If the default Section already exists, then when a Question is created without a selected Section, the new Question is automatically assigned to the existing default Section.
 8. (Optional) Determine the word limit for Qualitative and Short Text reporting questions using the Text Response Character Limit field on *Add New Question* popup.
 - a. Enter a number value in the Text Response Character Limit field to ensure that the respondent honors the user-defined character limit set for a Qualitative or Short Text question.
 - i. The screenshot below shows an example where the system administrator has set the character limit at 400 for a Qualitative reporting question.



The screenshot shows the 'Edit Template Question' interface. The 'Response Type' is set to 'Qualitative'. The 'Include Comments?' checkbox is unchecked. The 'Picklist Values' field contains the text 'Please type here.'. The 'Instructions' field contains the text 'Score performance in terms of program implementation'. The 'Is Scored' checkbox is checked. The 'Character Limit' field is set to '400'. A tooltip is displayed over the 'Character Limit' field with the text: 'Set a maximum character limit for qualitative responses. If responses exceed this character limit, then the respondent will receive an error message.' At the bottom of the form, there are three buttons: 'Cancel', 'Save & New', and 'Save'.

- ii. The user-defined character limit should be less than or equal to 32,768 characters for Qualitative responses and less than or equal to 255 characters for Short Text responses.
- iii. If no limit is set in the Text Response Character Limit field, then the limit will default to the default character limit for the Response Type:
 1. Qualitative responses: 32,768 characters.
 2. Short Text responses: 255 characters.

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

9. Click Save or Save & New.

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

Programme Assessment

Section Description

Programme Performance ✎ 🗑

Question Description	Response Type	
⋮ Objective of the programme	Qualitative	✎ 🗑
⋮ List the activities that were covered by this programme in detail	Qualitative	✎ 🗑
⋮ Rate your programme's success in achieving its objective	Picklist	✎ 🗑

Edit Questions in a Template

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

Programme Assessment

Section Description

Programme Performance

Question Description	Response Type	
Objective of the programme	Qualitative	
List the activities that were covered by this programme in detail	Qualitative	
Rate your programme's success in achieving its objective	Picklist	<div style="border: 2px solid red; padding: 2px;"></div>

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

Edit Template Question

Section

Programme Performance

* Description

Rate your programme's success in achieving its objective

Required?

Include Comments?

* Response Type

Picklist

Picklist Values ?

1,2,3,4,5

Cancel

Save & New

Save

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

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

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

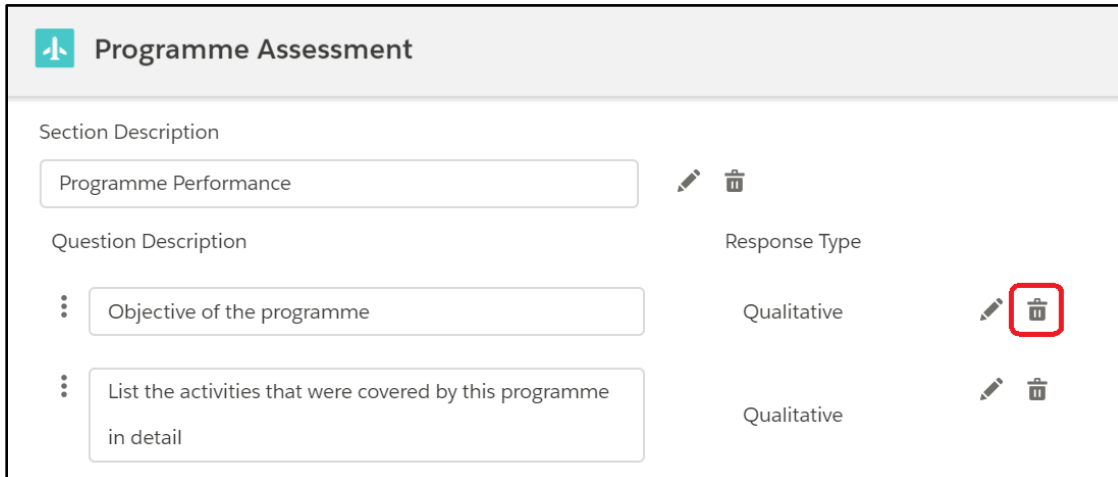
Section Description	
Programme Performance	
Question Description	Response Type
Objective of the programme	Qualitative
List the activities that were covered by this programme in detail	Qualitative
Rate your programme's success in achieving its objective	Picklist

2. 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.
3. 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.



Programme Assessment

Section Description

Programme Performance

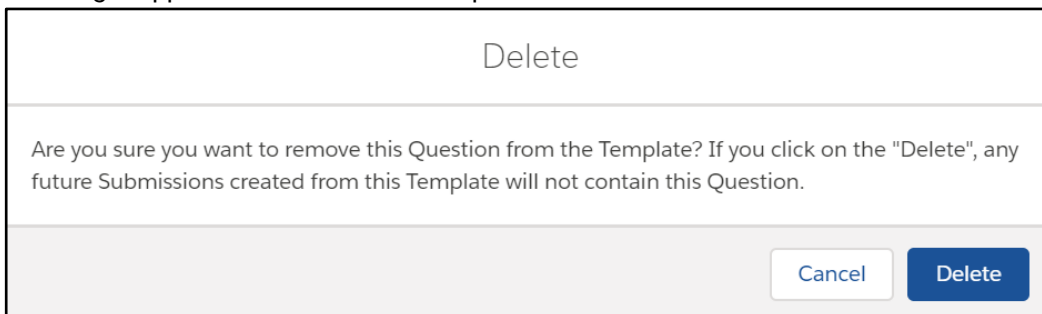
Question Description

- Objective of the programme
- List the activities that were covered by this programme in detail

Response Type

- Qualitative
- Qualitative

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.




Delete

Are you sure you want to remove this Question from the Template? If you click on the "Delete", any future Submissions created from this Template will not contain this Question.

ⓘ 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.



Submission Programme Assessment

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

You are currently viewing the Programme Assessment template in Preview Mode.

Download

Programme Assessment

* Name of individual responder

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☰ ☰ ☰

I_x

Programme Performance

Answer all questions on programme performance

* Objective of the programme ⓘ

Salesforce Sans 12

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.

Programme Assessment

* Name of individual responder

Salesforce Sans 12

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I_x

Programme Performance

Download Programme Assessment

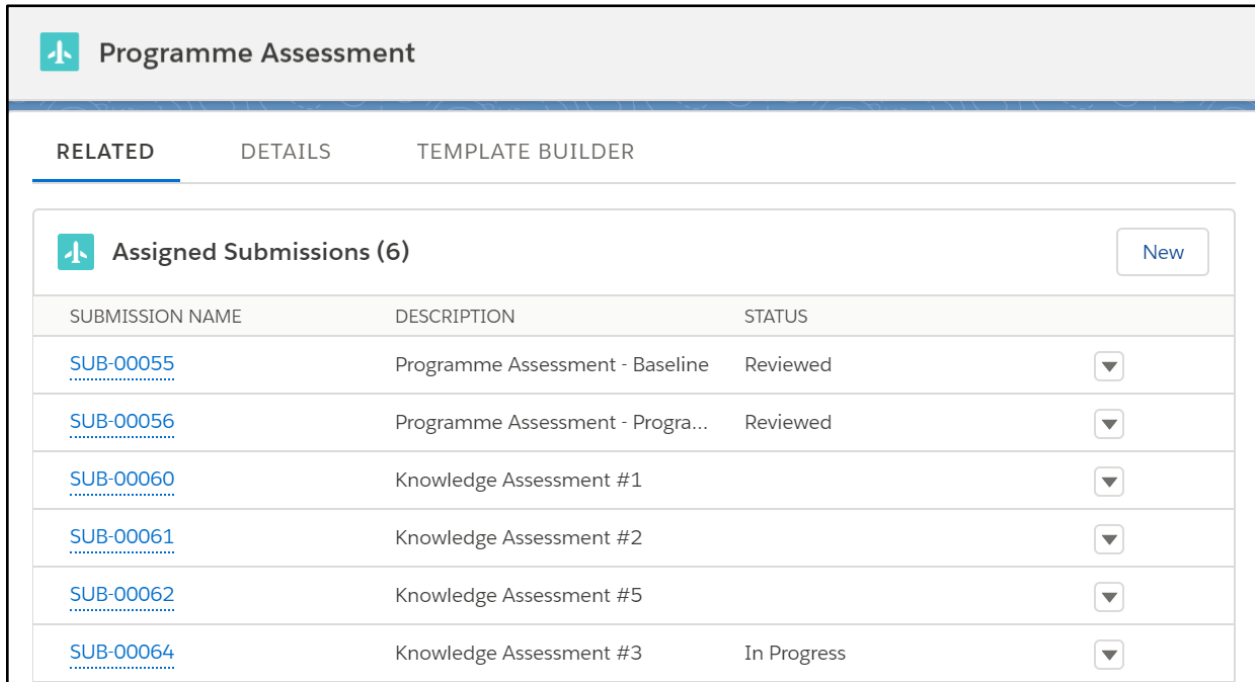
Please confirm if you would like to download this submission as a Word Document.

Cancel Confirm

Create and Assign Submissions from the Template

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

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



Programme Assessment

RELATED DETAILS TEMPLATE BUILDER

Assigned Submissions (6) New

SUBMISSION NAME	DESCRIPTION	STATUS	
SUB-00055	Programme Assessment - Baseline	Reviewed	▼
SUB-00056	Programme Assessment - Progra...	Reviewed	▼
SUB-00060	Knowledge Assessment #1		▼
SUB-00061	Knowledge Assessment #2		▼
SUB-00062	Knowledge Assessment #5		▼
SUB-00064	Knowledge Assessment #3	In Progress	▼

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

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

Clone the Template

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



Submission
Programme Assessment

Record Type
Template

Preview Edit Delete **Clone Submission**

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

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

- **ampi_Submission__c**
 - ampi_Description__c
 - ampi_Guidelines__c
 - ampi_Parent_Submission__c
 - ampi_Related_To__c
- **ampi_Section__c**
 - ampi_Active__c
 - ampi_Default__c
 - ampi_Description__c
 - ampi_Instructions__c
 - ampi_Is_Scored__c
 - ampi_Order__c
 - ampi_Parent_Section__c
- **ampi_Question__c**
 - ampi_Active__c
 - ampi_Description__c
 - ampi_Include_Comments__c
 - ampi_Instructions__c
 - ampi_Is_Scored__c
 - ampi_Order__c
 - ampi_Parent_Question__c
 - ampi_Picklist_Values__c
 - ampi_Required__c
 - ampi_Response_Type__c

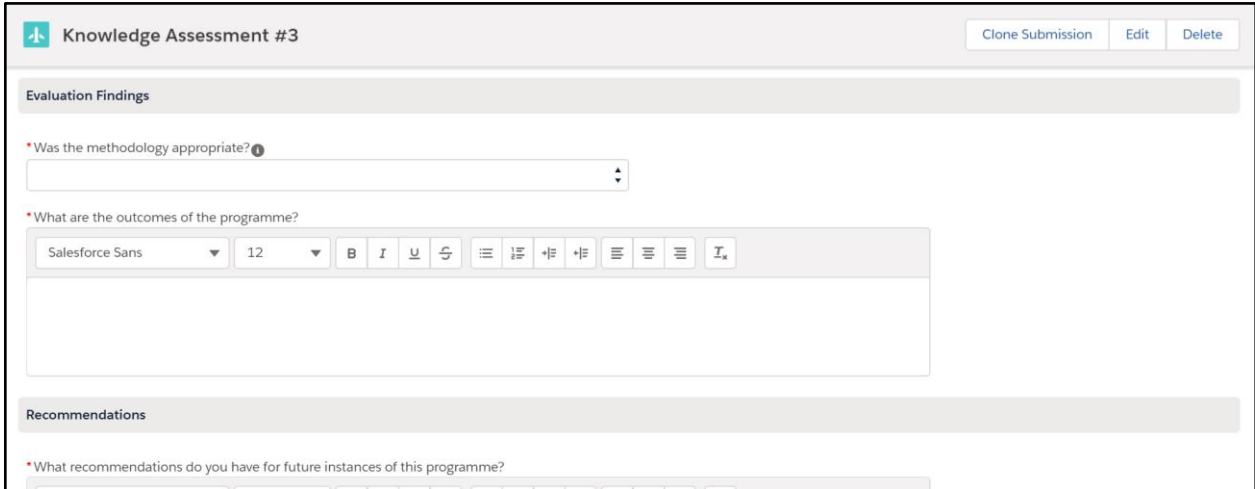
Response Guide

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

Fill Out the Submission Response

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

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



Knowledge Assessment #3 Clone Submission Edit Delete

Evaluation Findings

*Was the methodology appropriate? ⓘ


*What are the outcomes of the programme?

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Recommendations

*What recommendations do you have for future instances of this programme?

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



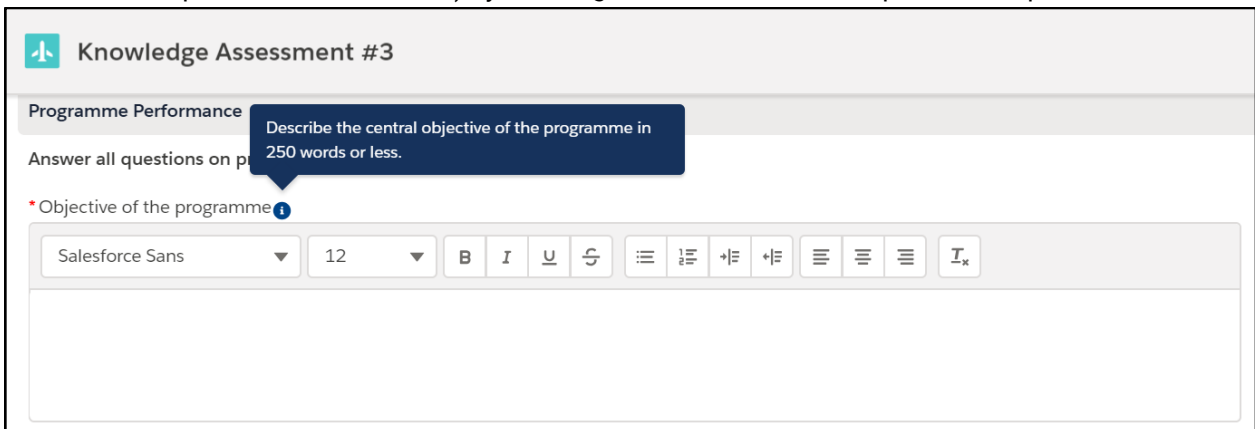
Programme Performance

Answer all questions on programme performance

*Objective of the programme ⓘ

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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.



Knowledge Assessment #3

Programme Performance

Answer all questions on programme performance

*Objective of the programme ⓘ

Describe the central objective of the programme in 250 words or less.

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

* Objective of the programme ⓘ

Salesforce Sans | 12 | **B** | *I* | U | ↺ | ☰ | ☰ | ☰ | ☰ | ☰ | ☰ | **I_x**

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

- b. Short Text - users respond in an input text field using a combination of letters and numbers.
 - i. Any short text 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 not honored by the respondent, then an error message will display stating that the prescribed word limit is exceeded.

Define a high level objective of programme in one sentence ⓘ

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

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

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

--None--
▲ ▼

--None--

1

2

3

4

5

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

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

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

* Select all countries where the project is operational

Bhutan X India X China X Thailand X |

--None--

✓ India

✓ Bhutan

✓ China

✓ Thailand

Russia

- f. Date - users will answer by selecting a date from a datepicker component.
- All date values save to the field `ampi__Date_Response__c`.
 - Selected/entered value displays according to User Locale.
 - By default, the date displays the current date `TODAY()` according to the User Locale.

Submission
Program Assessment 2020

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.

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July 2020

Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

Today

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

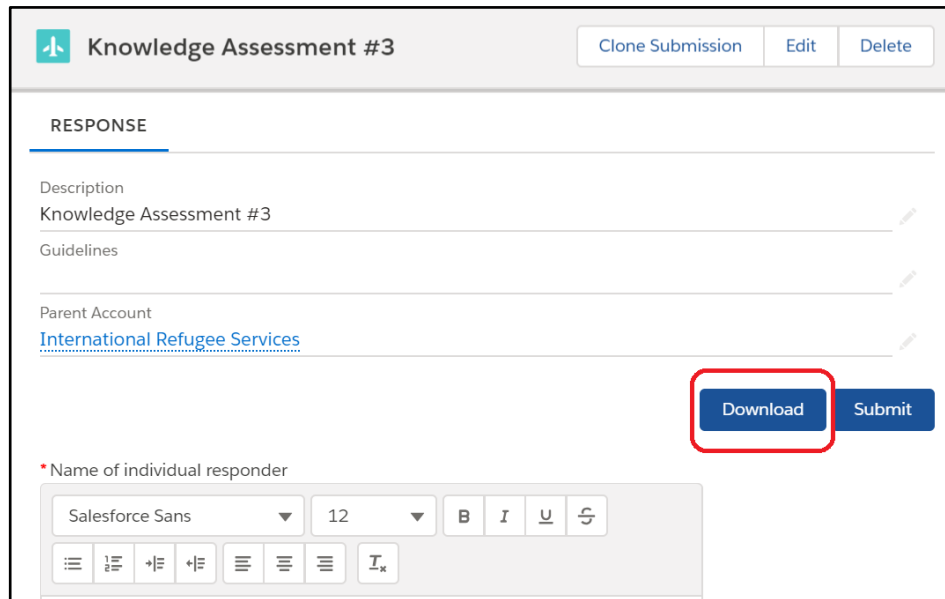
*What will be the total cost of the initial implementation? i

Please describe

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.



Knowledge Assessment #3

Clone Submission Edit Delete

RESPONSE

Description
Knowledge Assessment #3

Guidelines

Parent Account
[International Refugee Services](#)

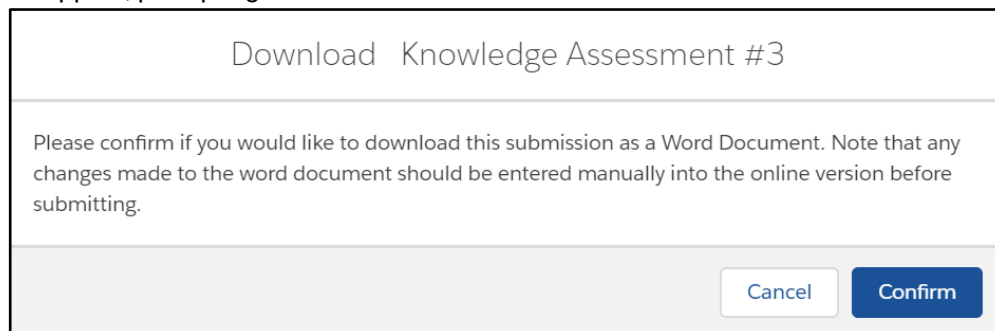
Download Submit

* Name of individual responder

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☰ ☰ ☰ ☰ ☰ ☰ ☰ ☰ ☰ ☰

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



Download Knowledge Assessment #3

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

Cancel Confirm

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.
 - 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

- 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
 - For picklist and multi-select picklist questions, the available picklist values will be displayed 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

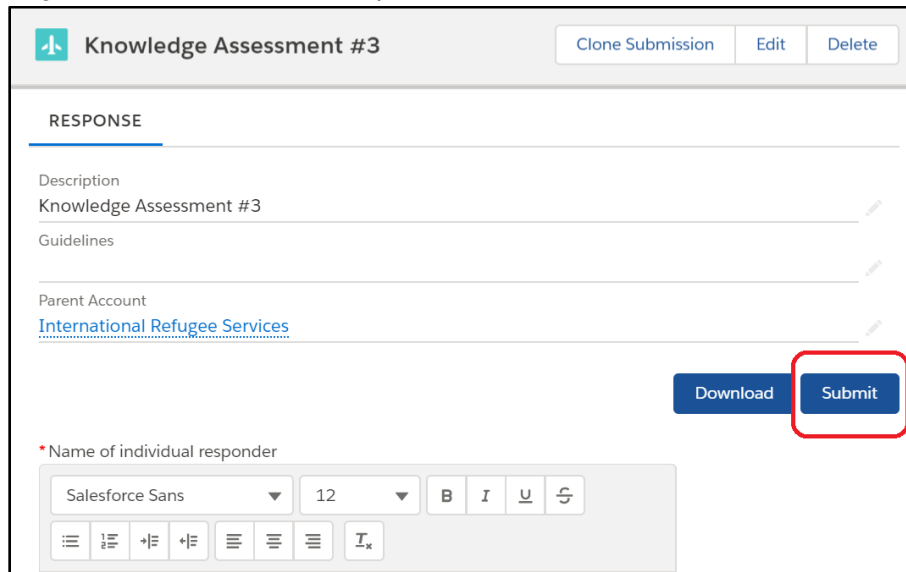
*** Q2 Where will the programme be operational in 2020?**

Rate the service provider

Bad
Average
Good
Best

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.



The screenshot shows a web form titled "Knowledge Assessment #3". At the top right, there are three buttons: "Clone Submission", "Edit", and "Delete". Below the title, there is a "RESPONSE" section with three text input fields: "Description" (containing "Knowledge Assessment #3"), "Guidelines", and "Parent Account" (containing a blue link "International Refugee Services"). At the bottom right of this section, there are two buttons: "Download" and "Submit", with the "Submit" button highlighted by a red rectangle. Below the response section, there is a label "* Name of individual responder" and a rich text editor with a font dropdown set to "Salesforce Sans", a size dropdown set to "12", and various text formatting icons (bold, italic, underline, link, list, indent, outdent, link, unlink).

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

Submit Knowledge Assessment #3

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


Cancel
Submit

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

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

Clone the Submission

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

 Knowledge Assessment #3

Clone Submission
Edit
Delete

Programme Performance

Answer all questions on programme performance

*Objective of the programme ⓘ

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I_x

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

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.

 Knowledge Assessment #3

Clone Submission
Edit
Delete

Programme Performance

Answer all questions on programme performance

*Objective of the programme i

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*I*_x

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

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

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

* Objective of the programme i

Salesforce Sans
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*I*_x

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

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.

Programme Performance

Answer all questions on p

Describe the central objective of the programme in 250 words or less.

* Objective of the programme ⓘ

Salesforce Sans 12

B **I** U ↺

☰ ☷ ☹ ☺ ☻ ☼ ☽ ☾ ☿

I_x

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

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`

* Objective of the programme ⓘ

Salesforce Sans 12 **B** **I** U ↺

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I_x

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

- b. 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 ⓘ

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 ⓘ

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 to the user

*Amount in dollars spent implementing the project

20000.99999

Invalid number

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

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

*Select all countries where the project is operational

Bhutan X India X China X Thailand X |

--None--

✓ India

✓ Bhutan

✓ China

✓ Thailand

Russia

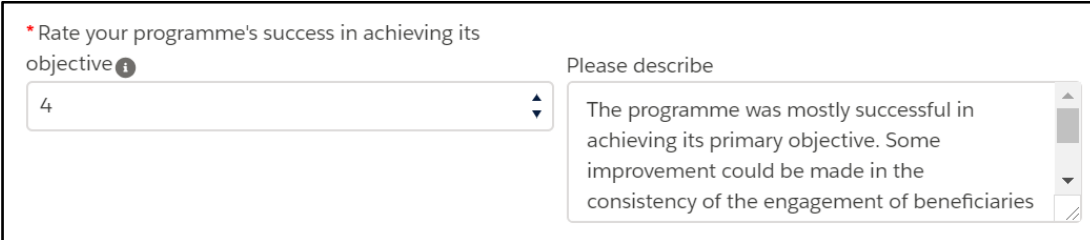
f. Date - responses are a date value, according to the user locale - e.g. MMM d, yyyy for English (US) locale.

i. All date values save to the field `ampi__Date_Response__c`

*Date of Program Completion

Jul 7, 2020

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`



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

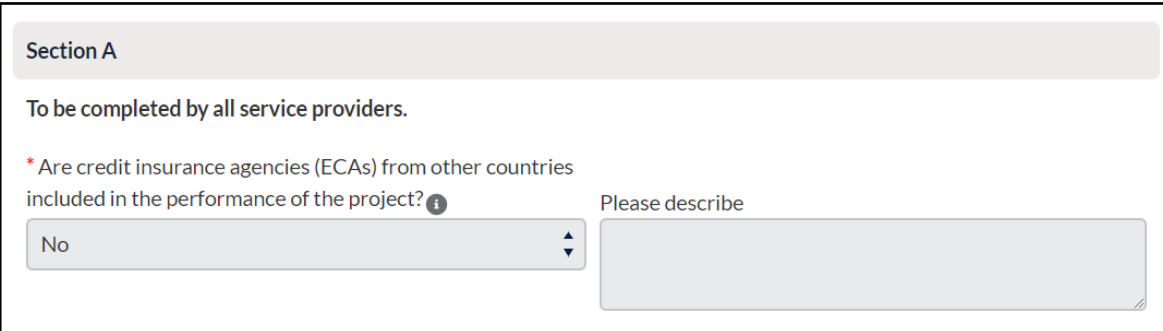
4

Please describe

The programme was mostly successful in achieving its primary objective. Some improvement could be made in the consistency of the engagement of beneficiaries

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

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



Section A

To be completed by all service providers.

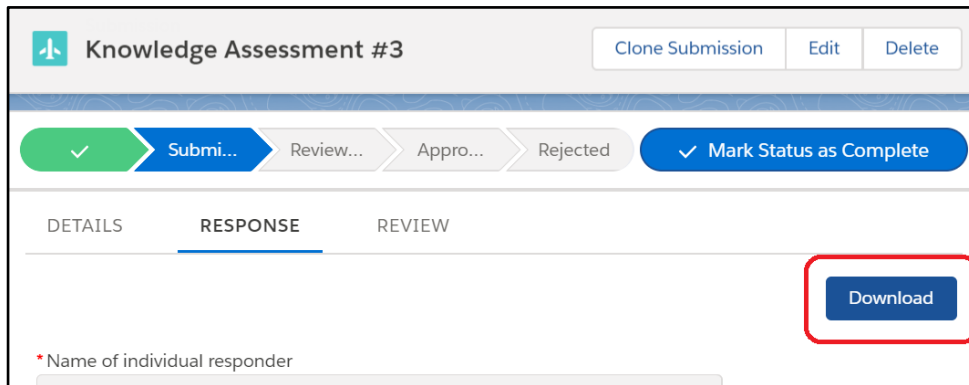
* Are credit insurance agencies (ECAs) from other countries included in the performance of the project? ⓘ

No

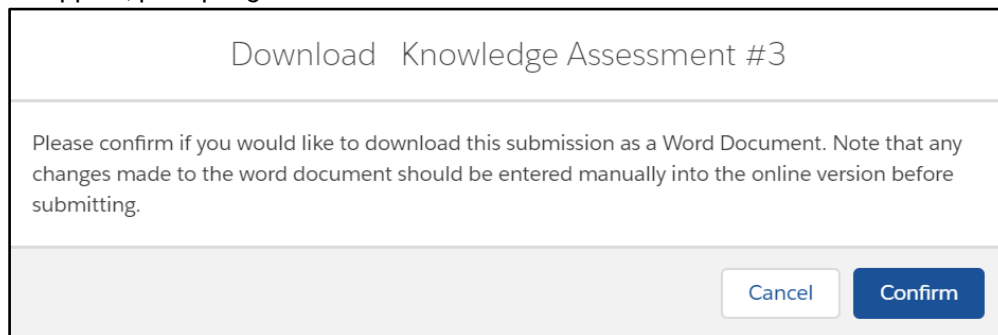
Please describe

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.
 - 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

- 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.
 - 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
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 China

*** Q2 Where will the programme be operational in 2020?**

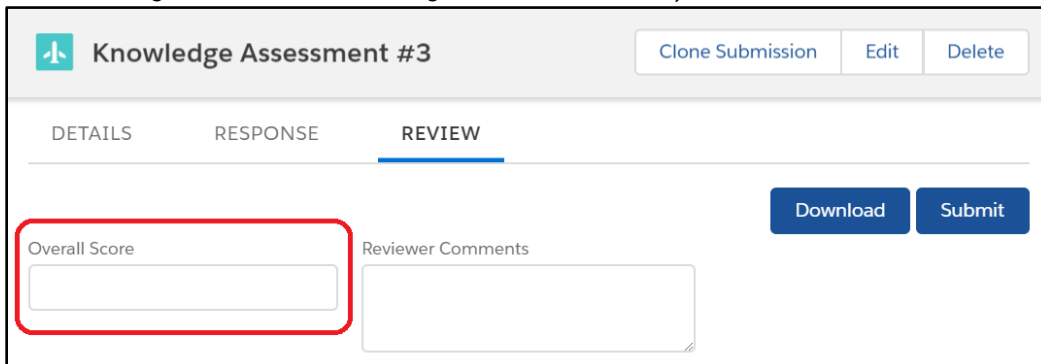
Rate the service provider

Bad
 Average
 Good
 Best

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).



Knowledge Assessment #3 Clone Submission Edit Delete

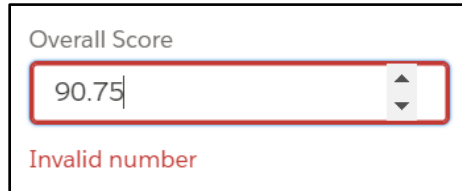
DETAILS RESPONSE **REVIEW**

Download Submit

Overall Score

Reviewer Comments

- 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

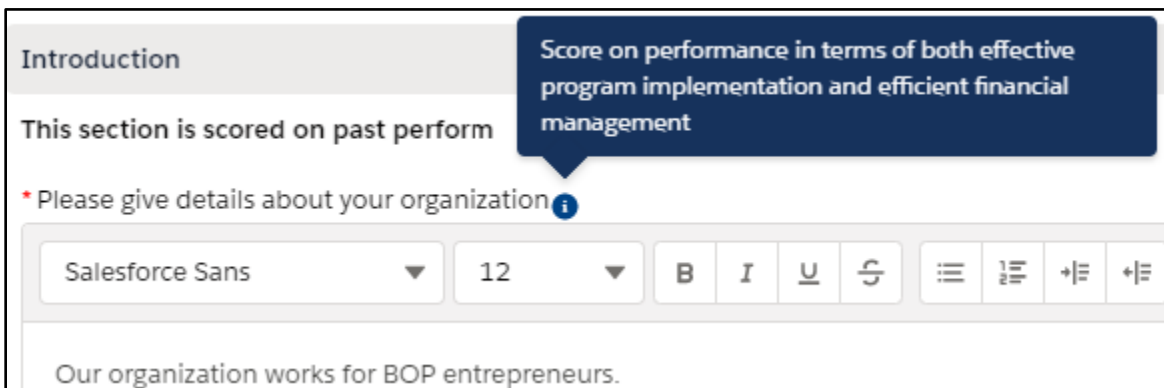


Overall Score

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 for each question. These instructions may be different from the instructions given to respondents. See screenshot below.



Introduction

This section is scored on past perform

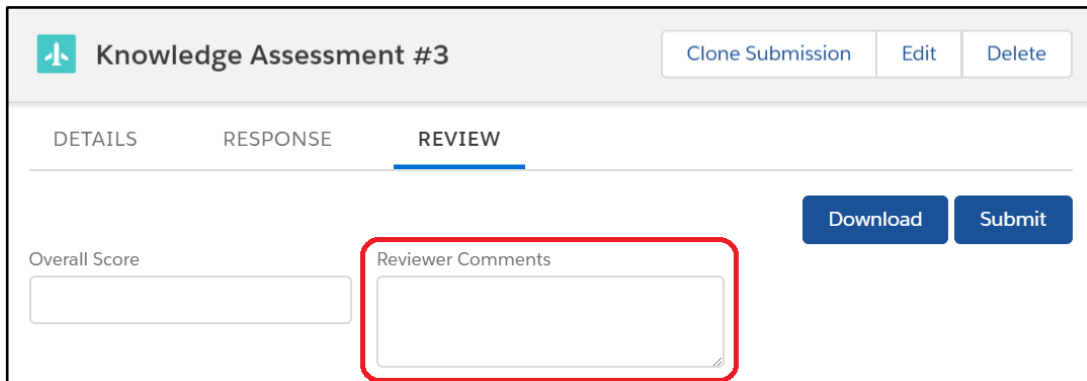
* Please give details about your organization i

Salesforce Sans 12 B I U S

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

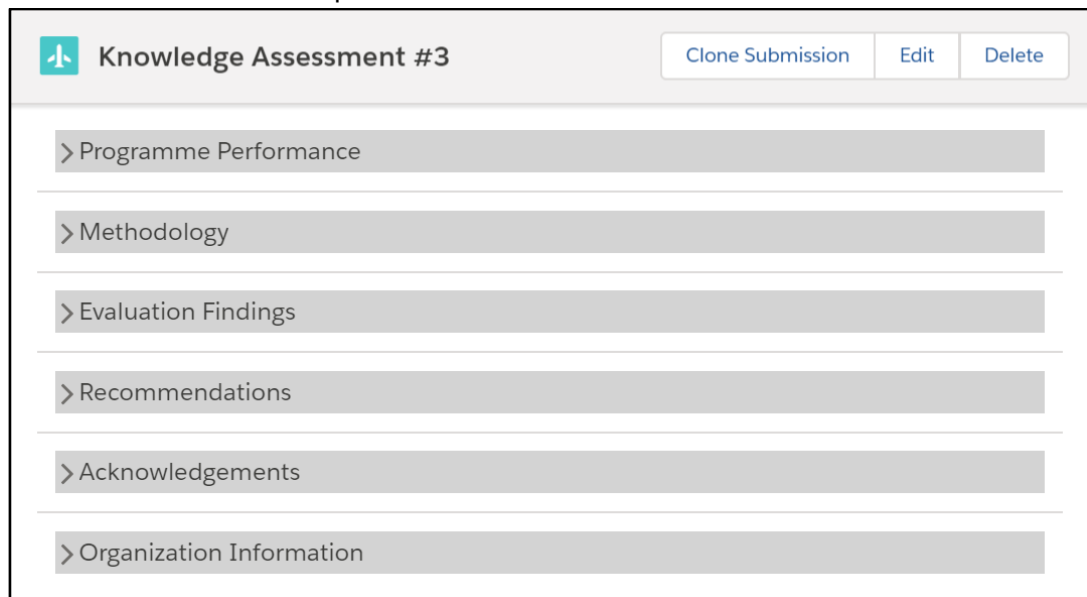
DETAILS RESPONSE **REVIEW**

Overall Score

Reviewer Comments

Download Submit

4. 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.



Knowledge Assessment #3 Clone Submission Edit Delete

> Programme Performance

> Methodology

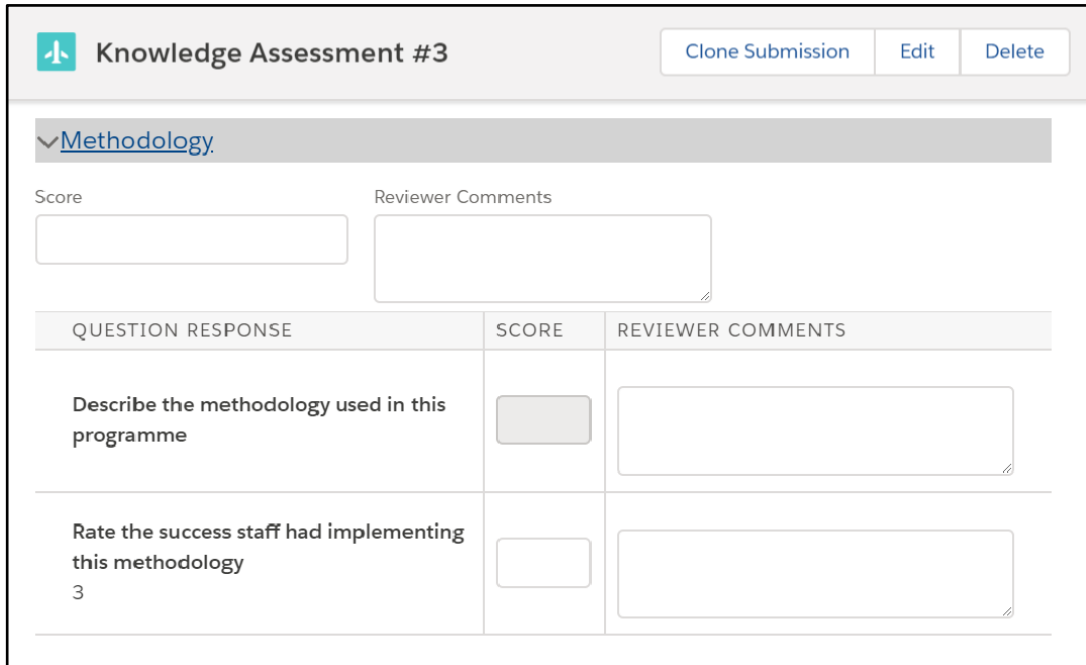
> Evaluation Findings

> 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.



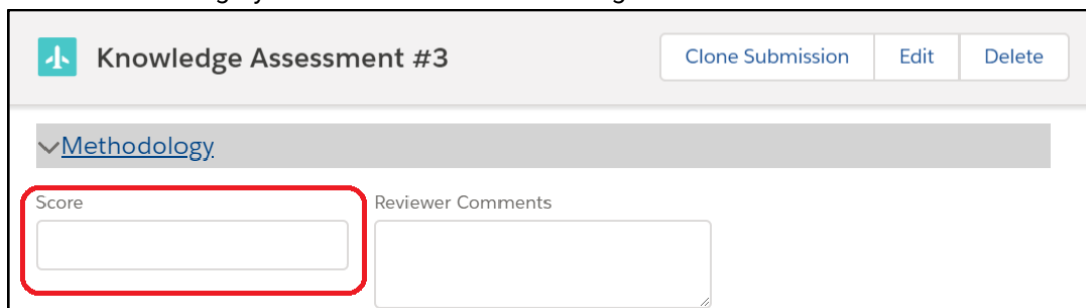
Knowledge Assessment #3 Clone Submission Edit Delete

Methodology

Score Reviewer Comments

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

- c. The Score field is displayed beneath the section's grey bar, and reviewers can directly enter a value with up to six whole number digits and one decimal value (i.e. total of eight characters, including the decimal marker).
- The number value entered is saved in `ampi_Score_c` on the `ampi_Section_c` record.
 - If the value entered exceeds the digit or decimal count, an error message will display to the user.
 - 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.
- The text value entered is saved in `ampi_Reviewer_Comments_c` on the `ampi_Section_c` record.

Knowledge Assessment #3

Clone Submission
Edit
Delete

▼ Methodology

Score

Reviewer Comments

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

QUESTION RESPONSE	SCORE	REVIEWER COMMENTS
<p>Objective of the programme 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.</p>	<input type="text"/>	<input style="width: 100%; height: 40px;" type="text"/>
<p>Rate your programme's success in achieving its objective 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)</p>	<input type="text"/>	<input style="width: 100%; height: 40px;" type="text"/>

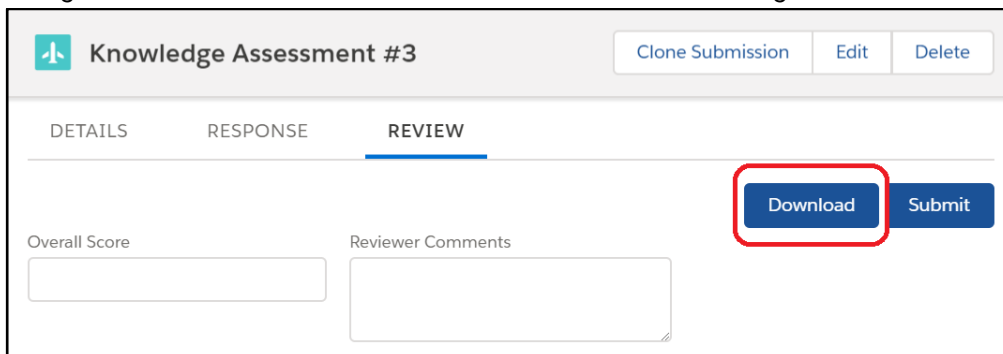
- i. Question Response: Contains the following field values on `ampi__Question__c` listed vertically
 1. `ampi__Description__c`
 2. `ampi__Text_Response__c`, `ampi__Short_Text_Response__c`, `ampi__Date_Response__c`, `ampi__Multi_Select_Picklist_Response__c`, `ampi__Picklist_Response__c`, OR `ampi__Number_Response__c` (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.

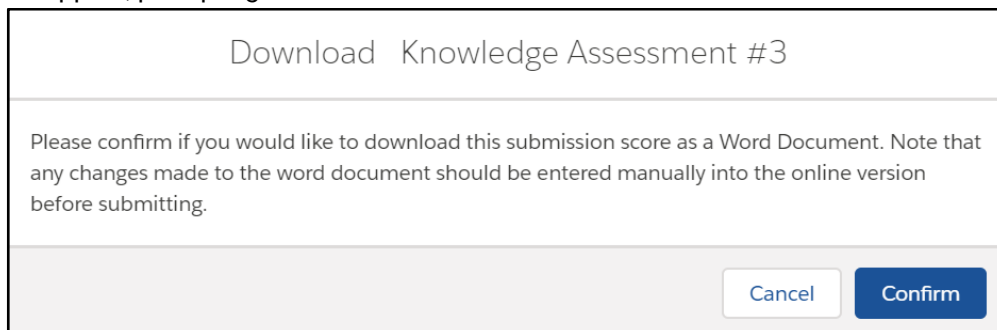
Once scores have been entered, users can either [download scores](#) as a Word document or [submit their scores](#) for a final review.

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.



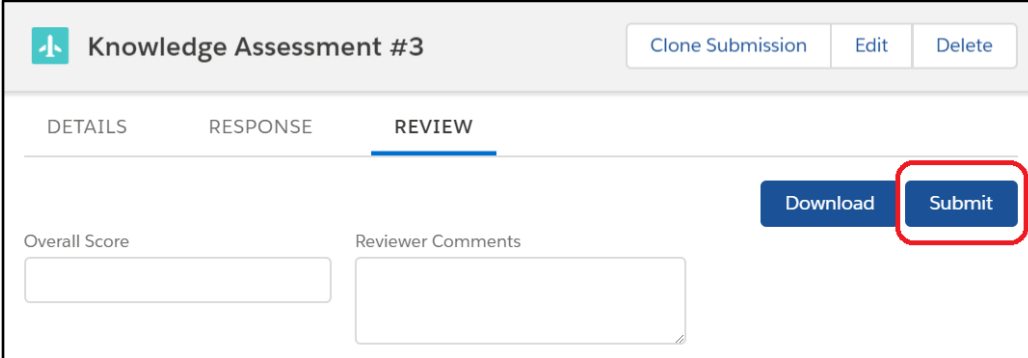
- Overall Score and Reviewer Comments for the entire submission are printed at the top of the Word document, underneath the header.

- 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.



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

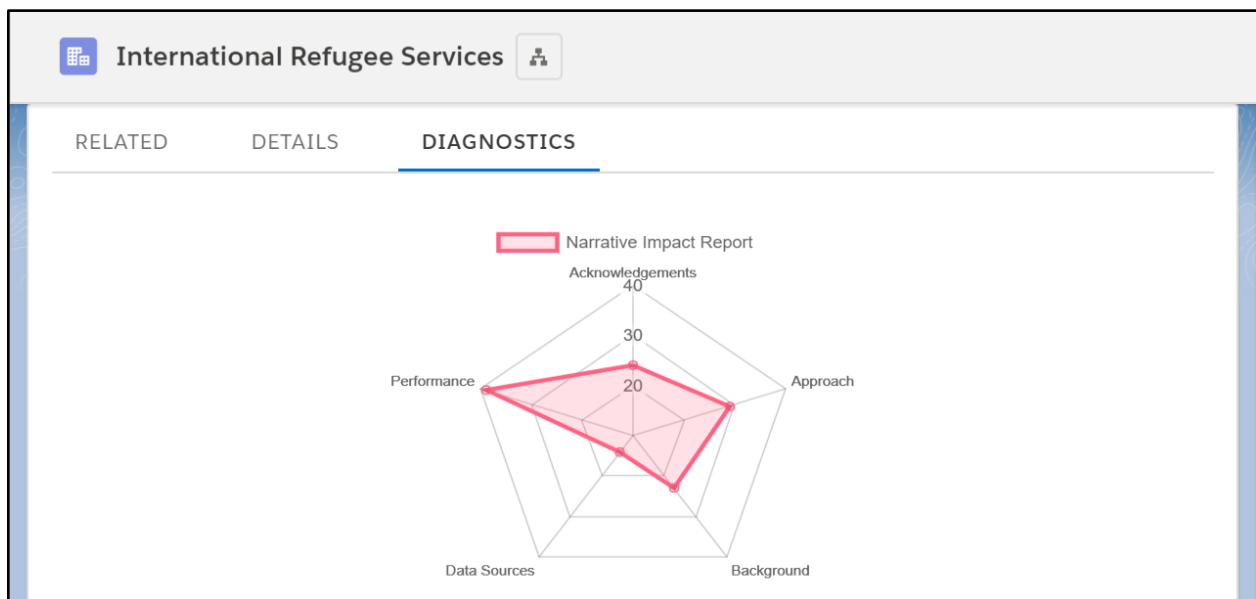
Reviewer Comments

QUESTION RESPONSE	SCORE	REVIEWER COMMENTS
<p>Objective of the programme 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.</p>	<input style="width: 40px; height: 20px;" type="text"/>	<input style="width: 100%; height: 30px;" type="text"/>

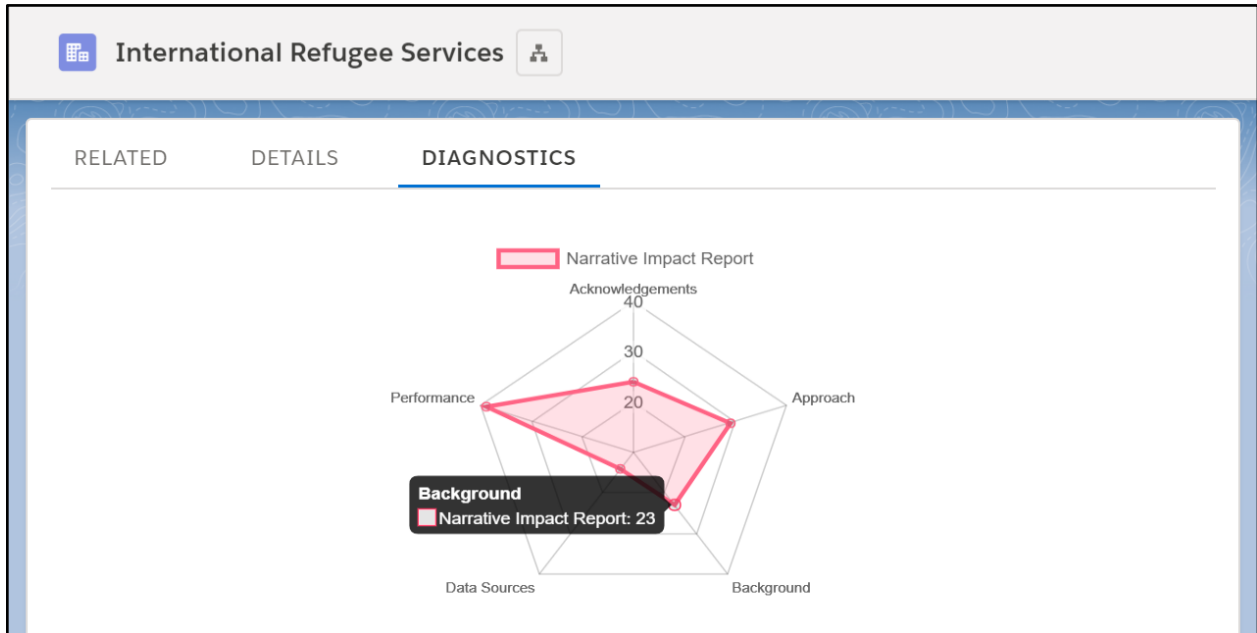
View Radar Charts

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

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

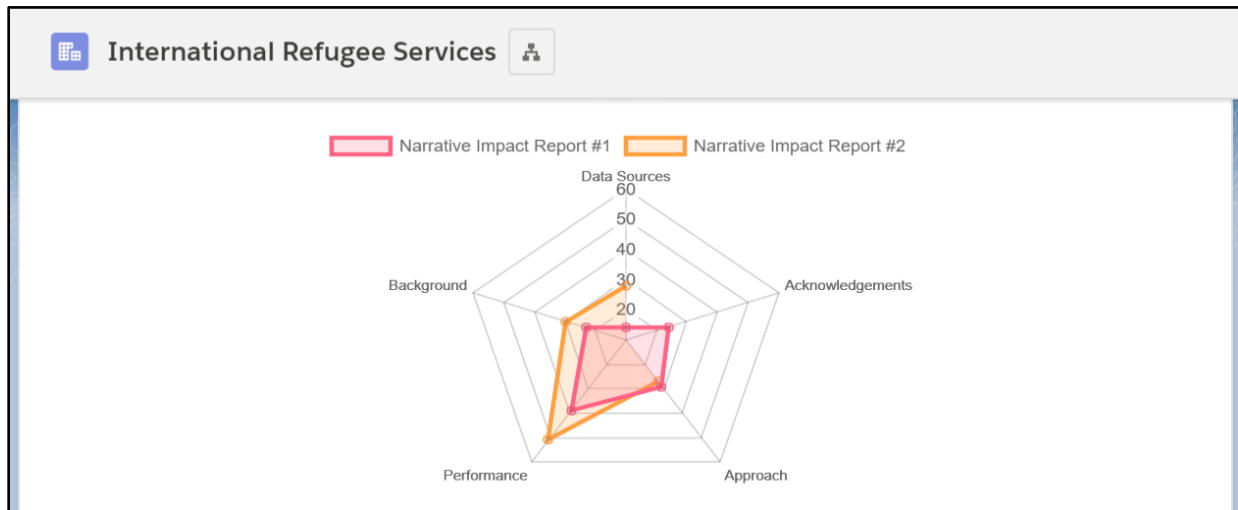


Each corner of the displayed radar chart represents and is labeled by the sections on the submission. Each mapped point on the radar chart represents the `ampi_Score_c` value on the `ampi_Section_c` that is displayed. The scale of the radar chart dynamically renders based on the minimum and maximum score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

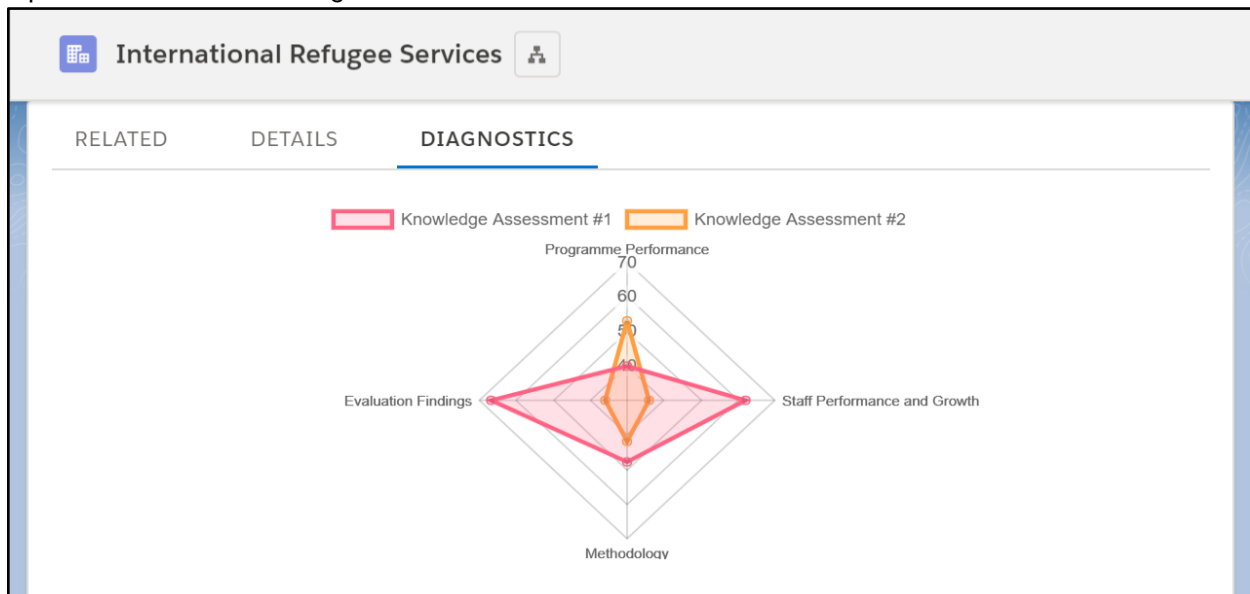


As long as a section has been added to the Template, it will display in the radar chart, even if the section has since been removed from the template.

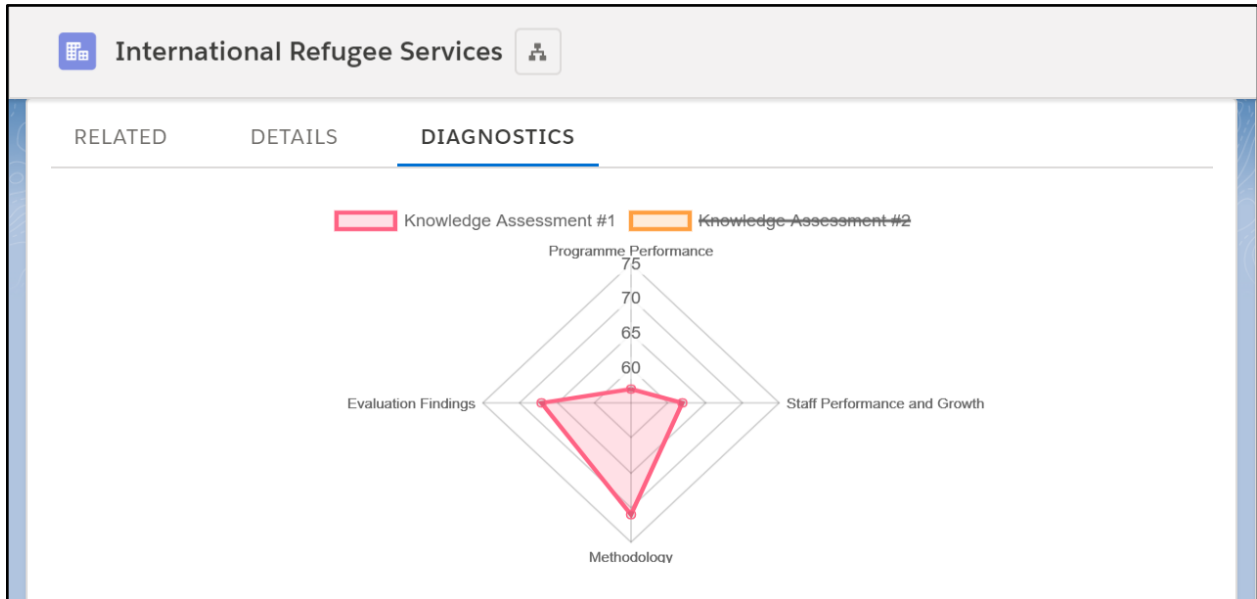
For example, the Narrative Impact Report template is originally created with an Acknowledgements section. The template is copied to create submissions, which are completed and scored. The Acknowledgements section is subsequently removed. The updated template is copied to create additional submissions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



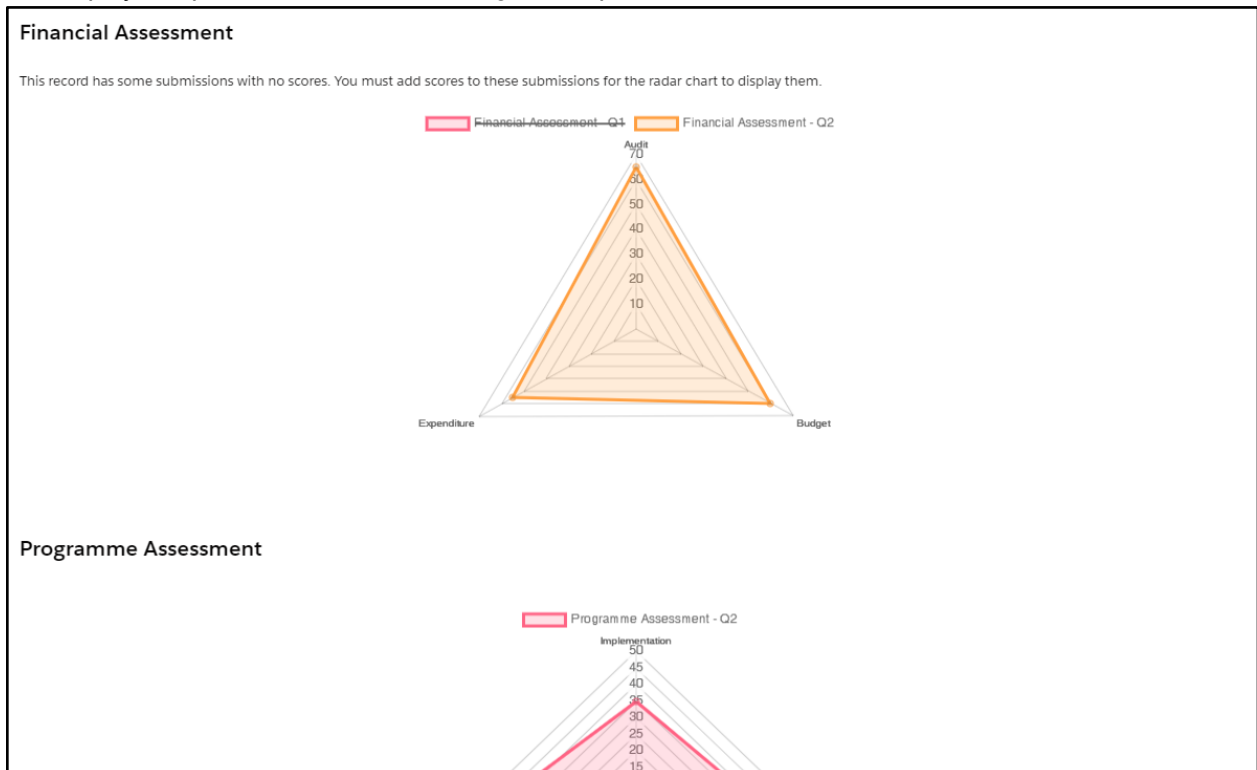
If multiple submissions created from the same template have been assigned to the same parent record, they are displayed with different colors on the same radar chart. A legend is displayed above the radar chart, indicating which color is assigned to each submission and displaying the submissions in alphabetical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



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

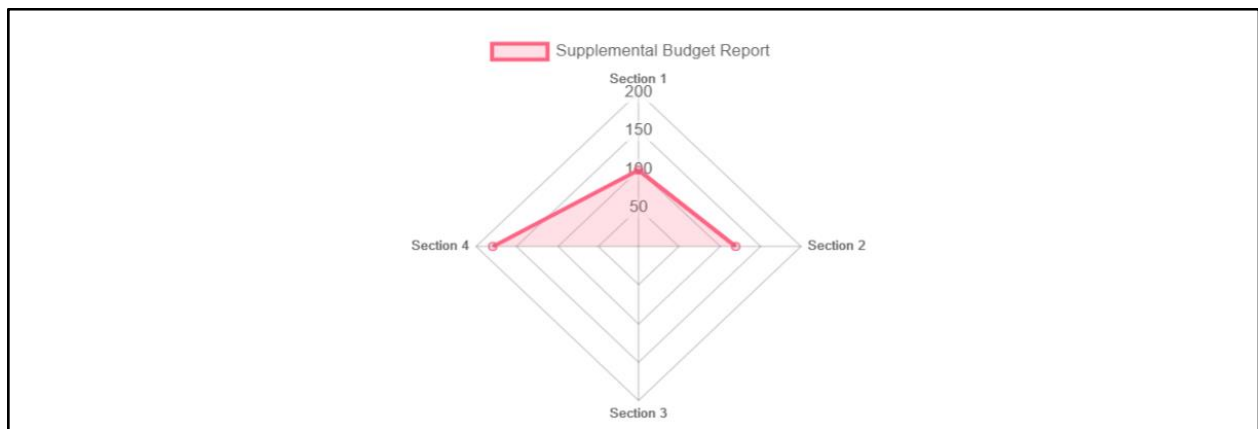


If multiple submissions created from different templates have been assigned to the same parent record, multiple radar charts are displayed in a column - one radar chart per original template. These radar charts will display in alphabetical order according to Template name.



If a Section__c in the assigned Submission is unscored (Is_Scored__c = FALSE), the section does not display in the Radar Chart.

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



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

[Attachments](#) [Details](#) [Financials](#) **Radar Charts**

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

The radar chart component does not render and displays the same message as in the above screenshot, in the following scenarios:

1. The Submission Template does not have any sections. This implies that section-wise scores cannot be entered in the Submission Review component of any of the assigned submissions.
2. All assigned Submissions have unscored Sections (Is_Scored__c = FALSE), and they have at least one Question which is scored (Is_Scored__c = TRUE).

The above message displays in the Radar Chart component at the template level. If multiple templates are related to a parent object, then the radar chart should render for those templates for which the assigned submissions do not match the above-mentioned behavior.