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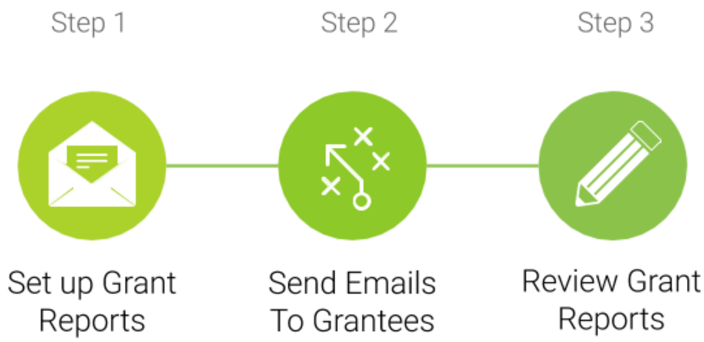
Funder User Guide: Manage Grant Reports

April 2020

Overview



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

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

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

Set up Grant Reports

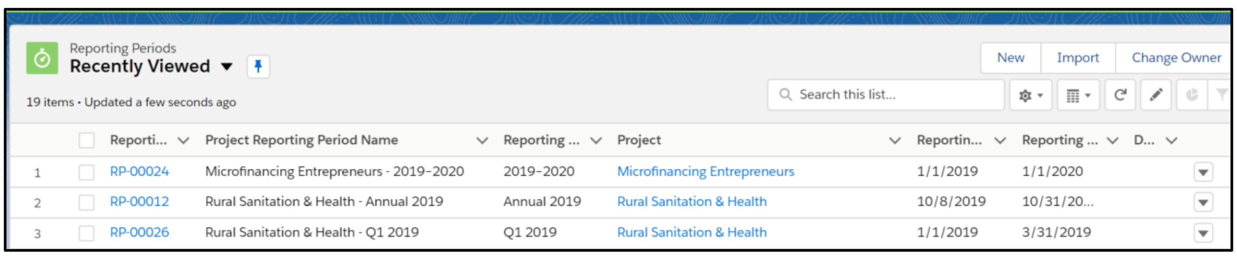
Create Grant Reporting Periods

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

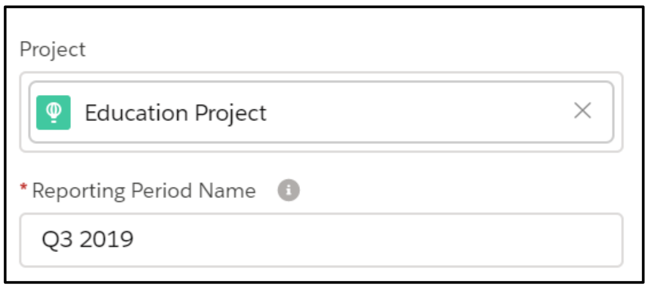
1. Funders can create grant reports using the Reporting Period object. Ensure that the Reporting Period is associated with a Project object.

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

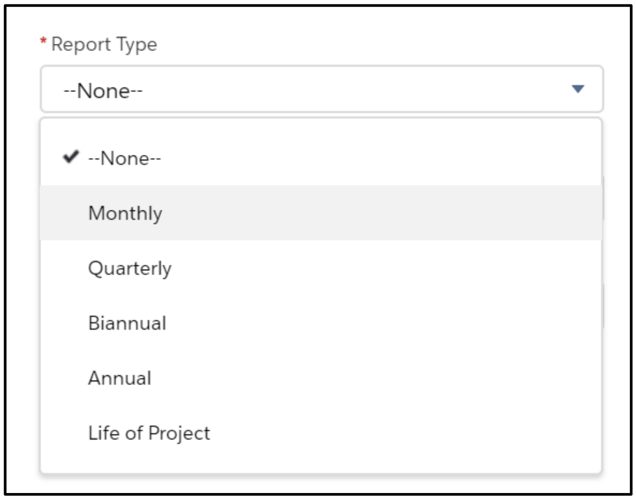
2. To create reporting periods, click the New Reporting Period button from the related list on your Project object, or go to the Reporting Periods object and click New.



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



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

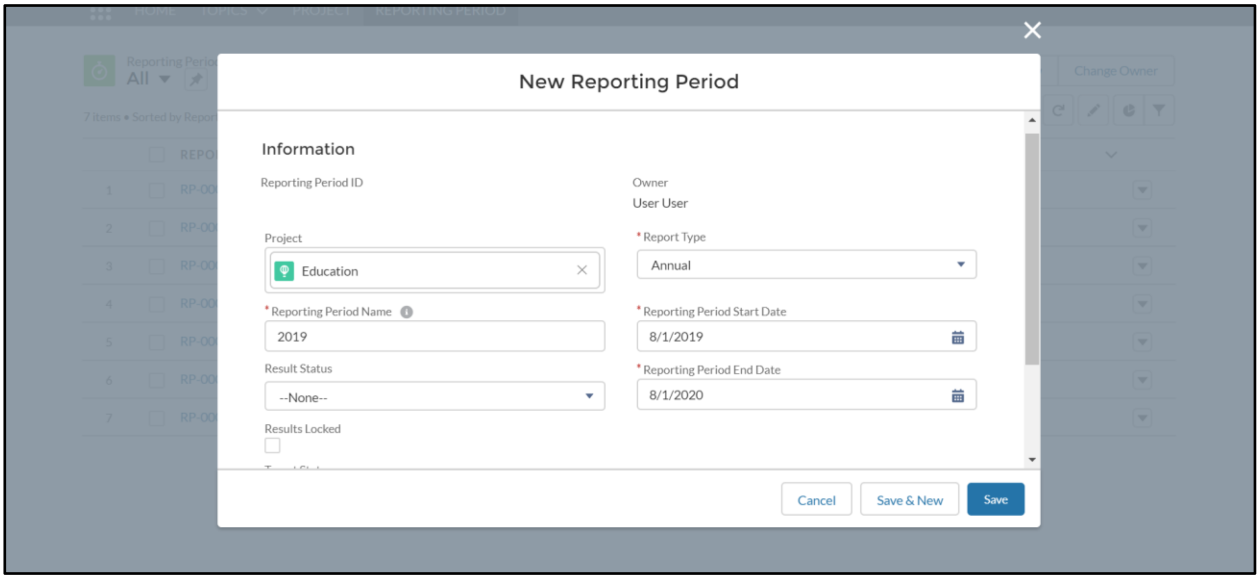


ⓘ The report type frequency **must** match the Reporting Frequency on at least one Indicator in order for the Indicator to appear on the Set Targets/Add Results pages for the Grantee.

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

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

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



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

Invite Grantees to Report via Email

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

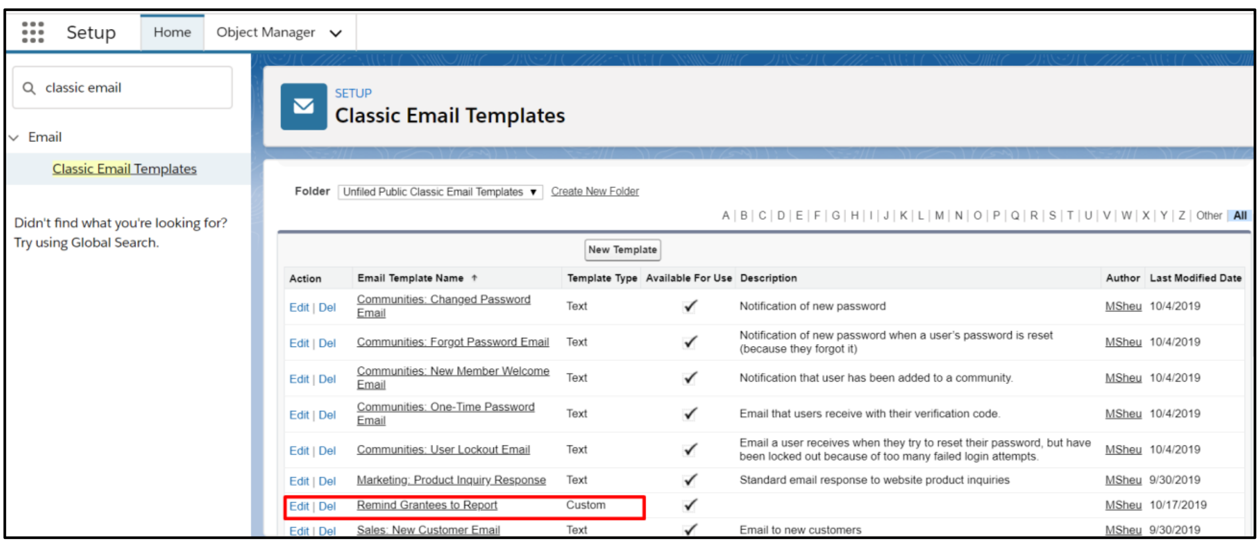
ⓘ To learn about setting up email alerts, please refer to the *Grantee Reporting Setup Guide*.

Customize Email Template

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

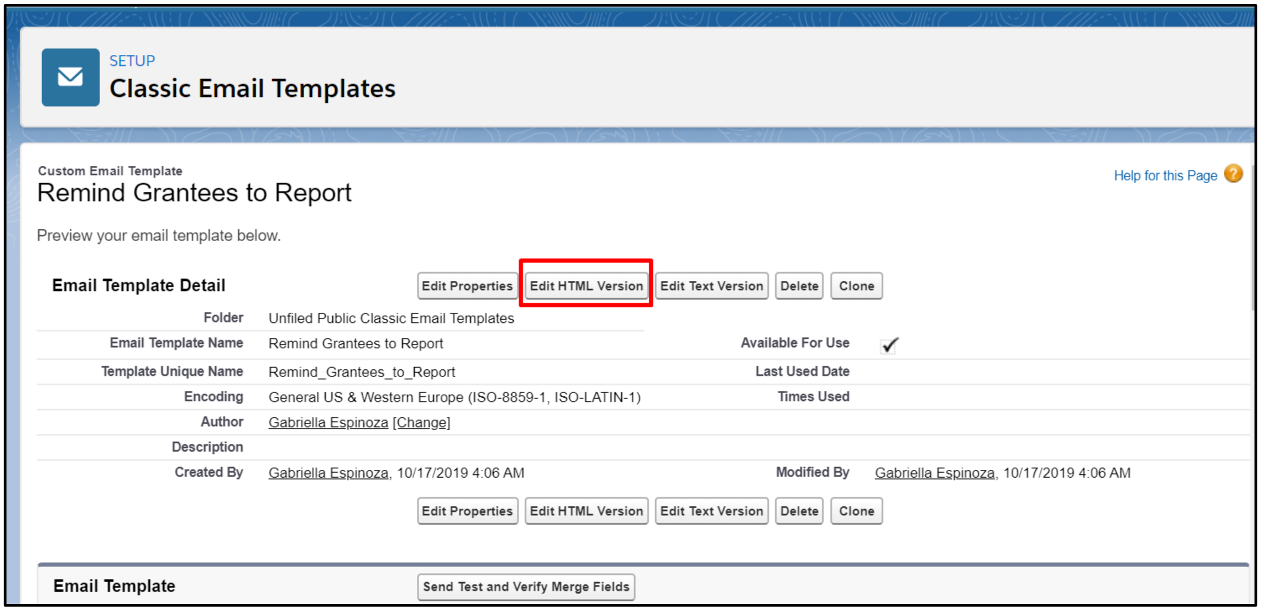
1. Navigate to Setup, and use the Quick Find search for Classic Email Templates.

2. Locate the preexisting custom template.

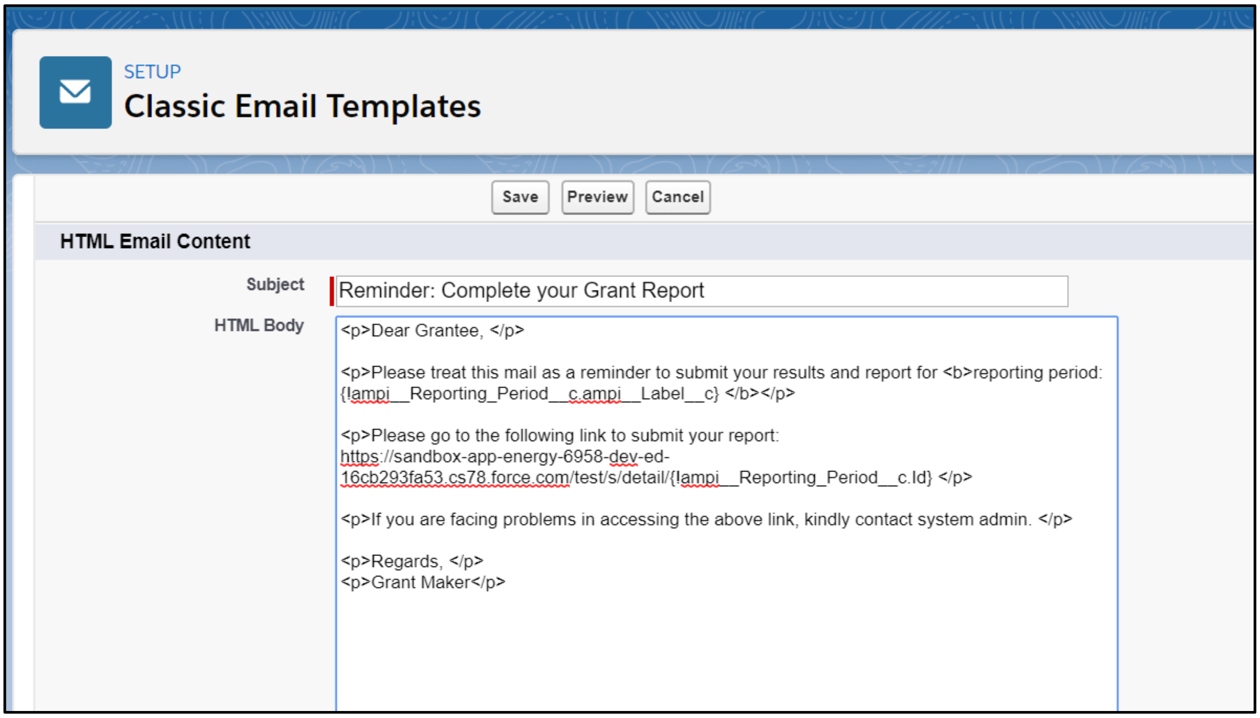


ⓘ "Remind Grantees to Report" is the suggested Email Template Name provided in the Setup Guide. The naming conventions of each organization may differ.

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



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



5. Click *Save*.

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

6. Click Edit Text Version, shown below.

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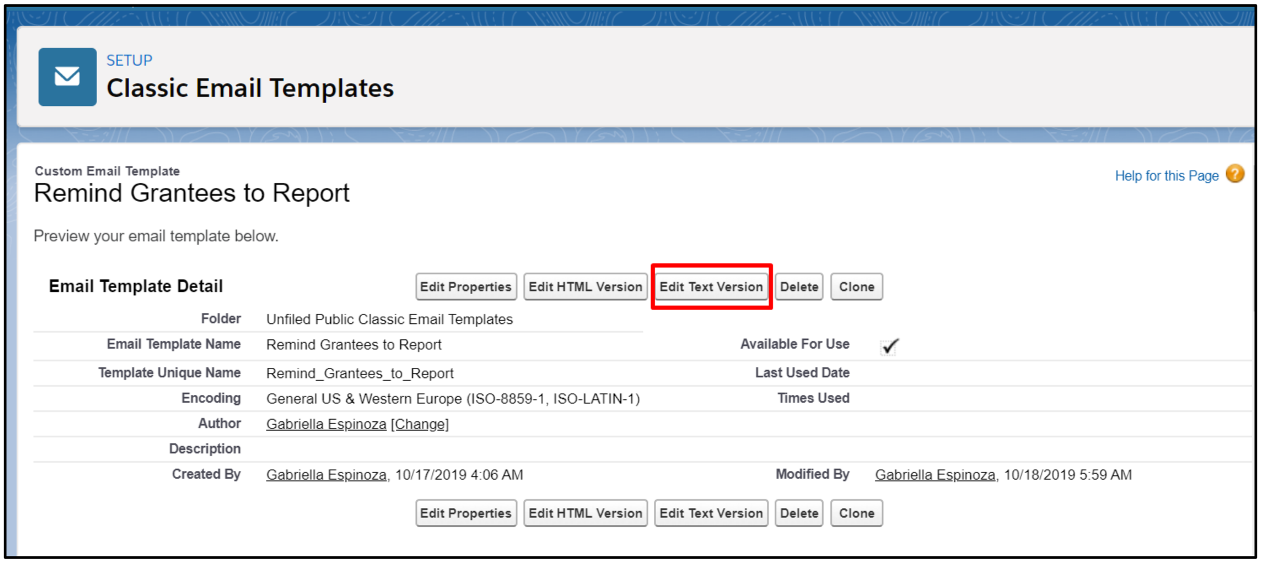
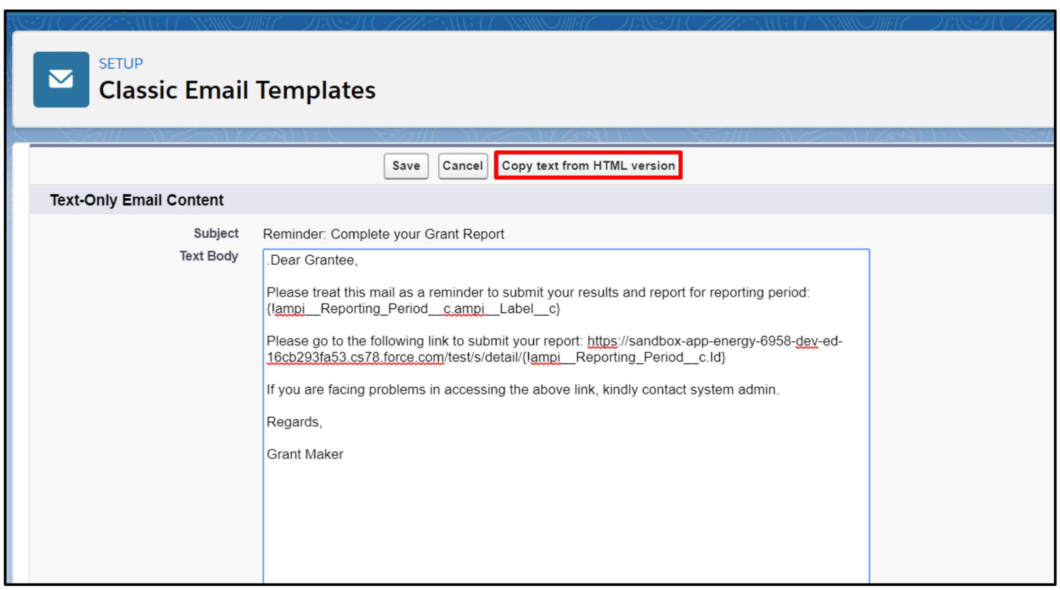


7. Include the same adjustments from the edited HTML Version to the Text Version by clicking the Copy text from HTML Version button. See below for screenshot.



8. Click *Save*.

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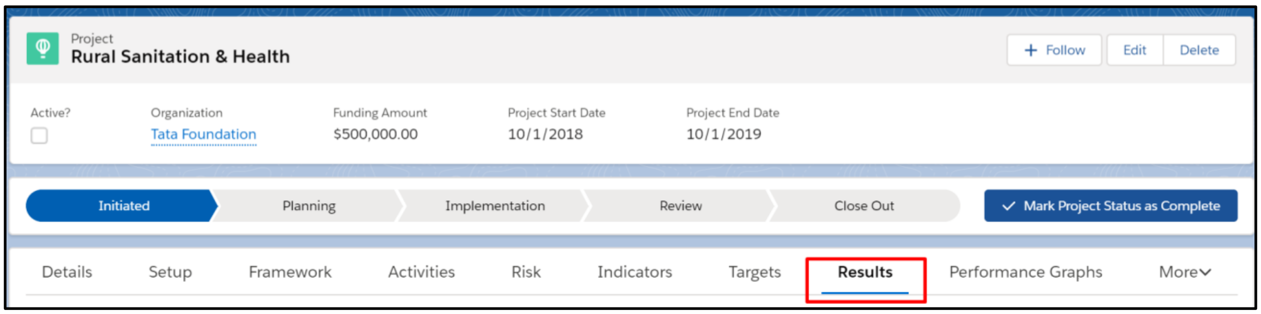
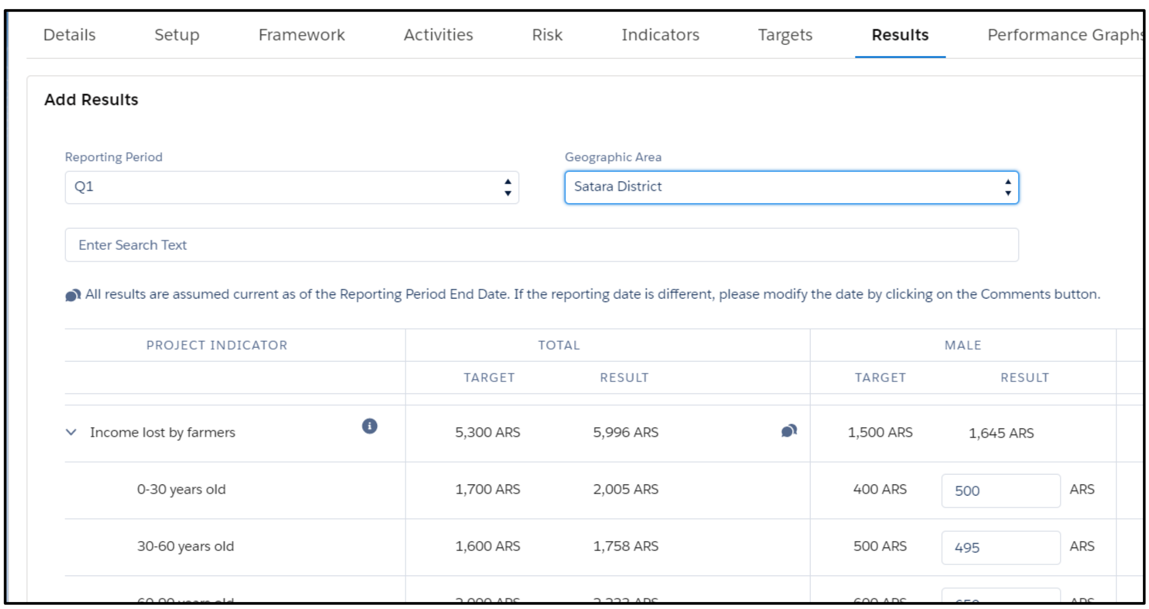
Review a Grant Report - Indicator Results

Review Results per Reporting Period

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



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



3. If Indicator Performance Stoplights are enabled and the fields Aim, % Threshold Between Red and Yellow, and % Threshold Between Yellow and Green are populated on Project Indicators, then the results table will display stoplight icons to calculate results performance compared to targets.
    a. If the calculation is greater than or equal to Threshold Between Yellow and Green, a ***green*** stoplight icon is displayed.

    b. If the calculated value is less than the Threshold Between Yellow and Green but greater than or equal to Threshold Between Red and Yellow, a ***yellow*** stoplight icon is displayed.

    c. If the calculated value is less than the Threshold Between Red and Yellow, a ***red*** stoplight icon is displayed.

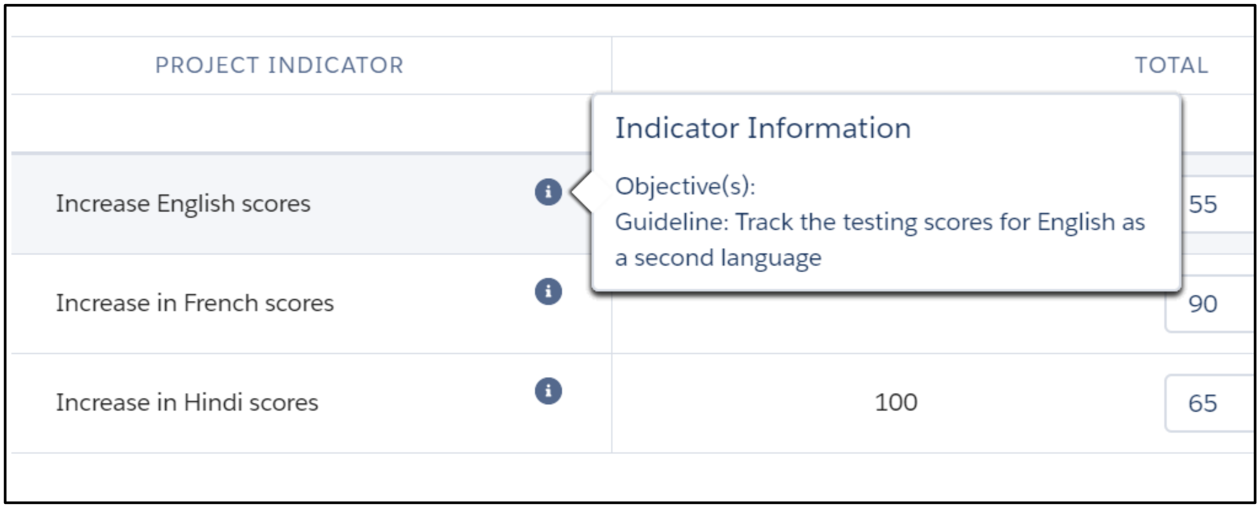
    d. See screenshot below.

PROJECT INDICATOR	TOTAL		
	TARGET	RESULT	
> Amount deposited by Area Type	533	310	
Amount deposited into savings accounts	225,500 KES	290,000	KES
> Assessments given	2,590	1,085	

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

4. Hover over the information icon to the right of each project indicator to view the information that was available to a grantee while they were reporting.

5. On hover, information about the indicator is displayed for informational and guidance purposes, as shown below.

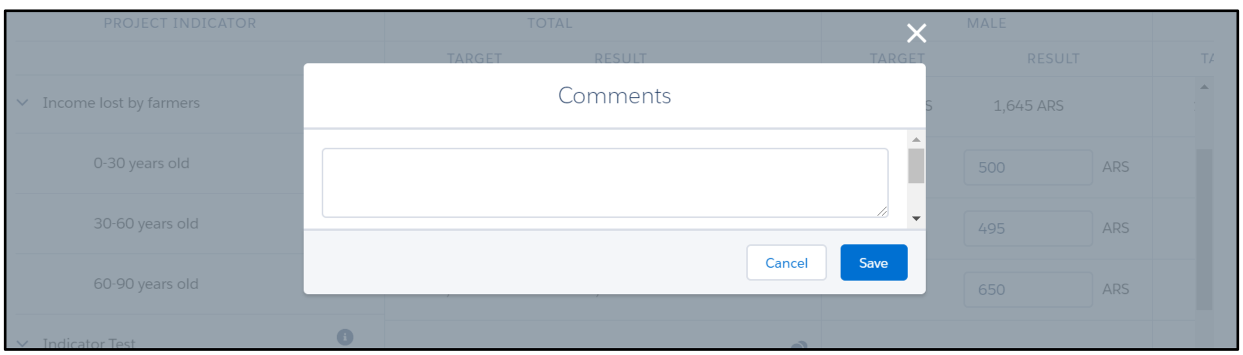


ⓘ The fields in the Info icon are controlled by a field set on the Project Indicator record. Contact a system admin to learn more.

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

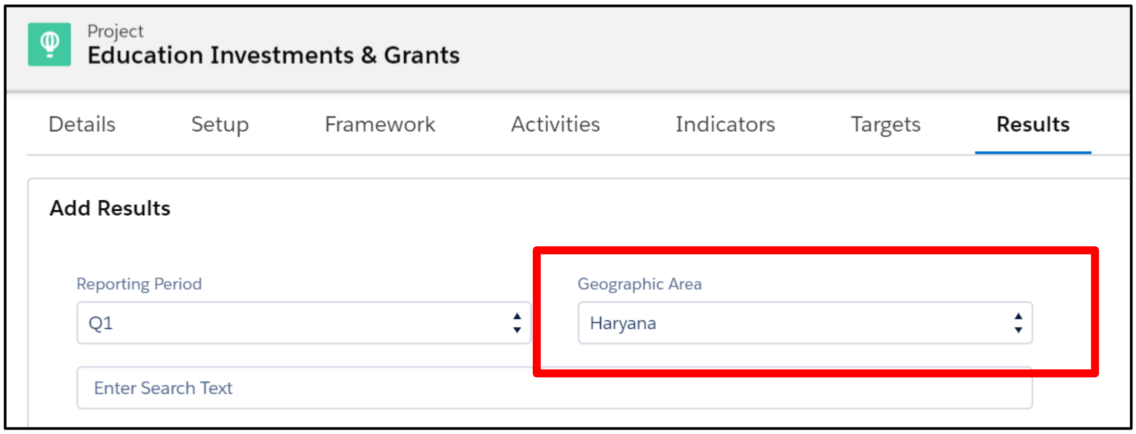
PROJECT INDICATOR	TOTAL	
	TARGET	RESULT
Income lost by farmers	5,300 ARS	5,996 ARS
0-30 years old	1,700 ARS	2,005 ARS
30-60 years old	1,600 ARS	1,758 ARS
60-90 years old	2,000 ARS	2,233 ARS

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



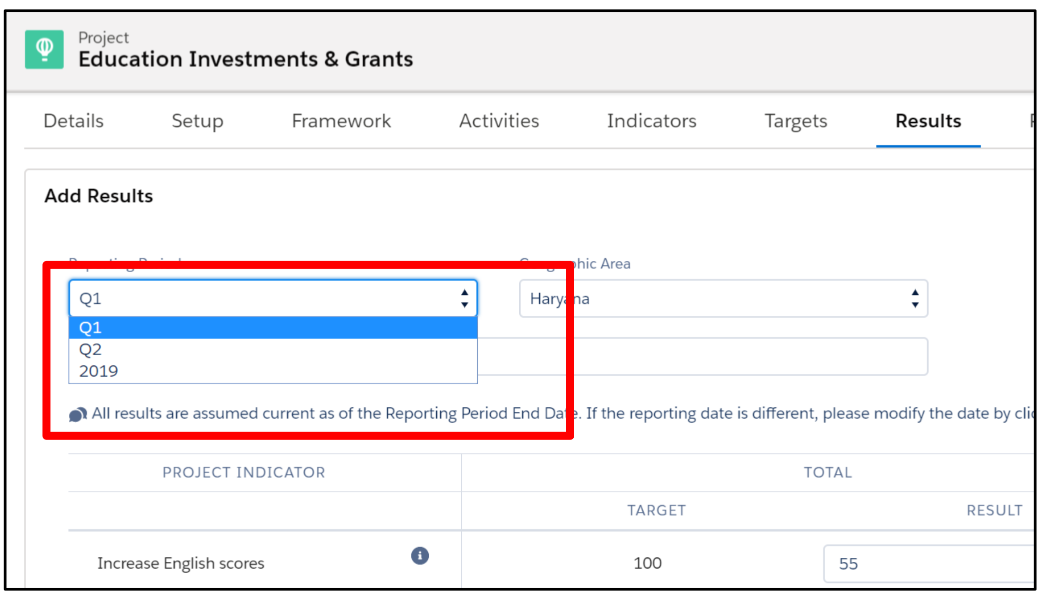
View Results per Geographic Level

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



Toggle between different Reporting Periods

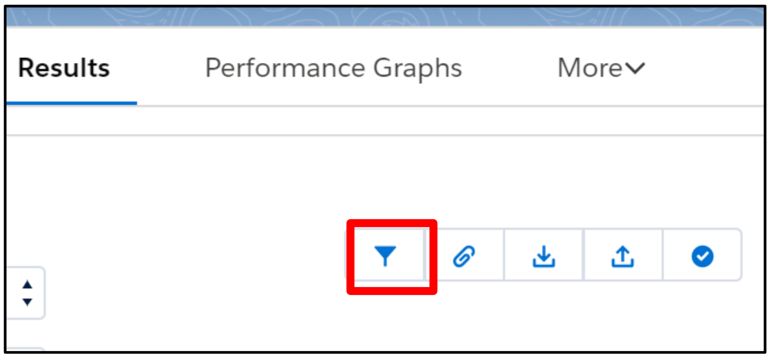
Funders can select different reporting periods from a dropdown.



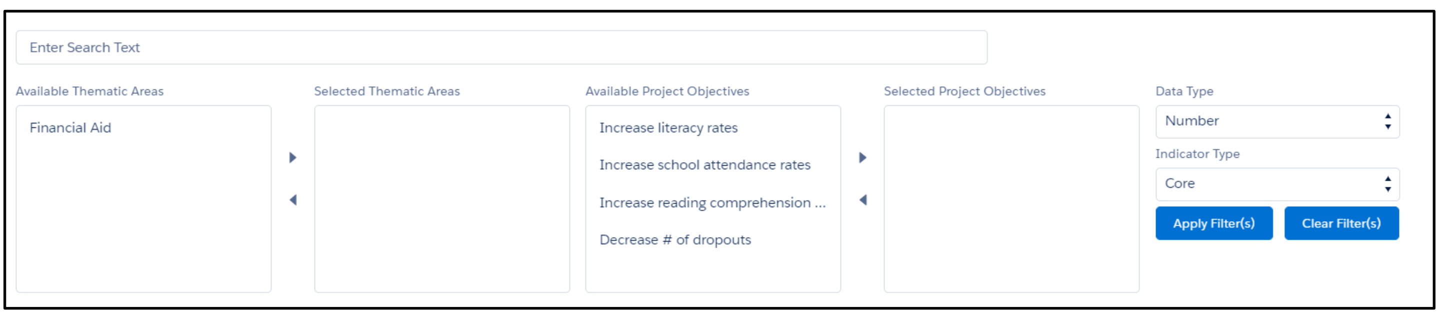
Apply Indicator search filters

Funders may filter to specific indicators while reviewing results.

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

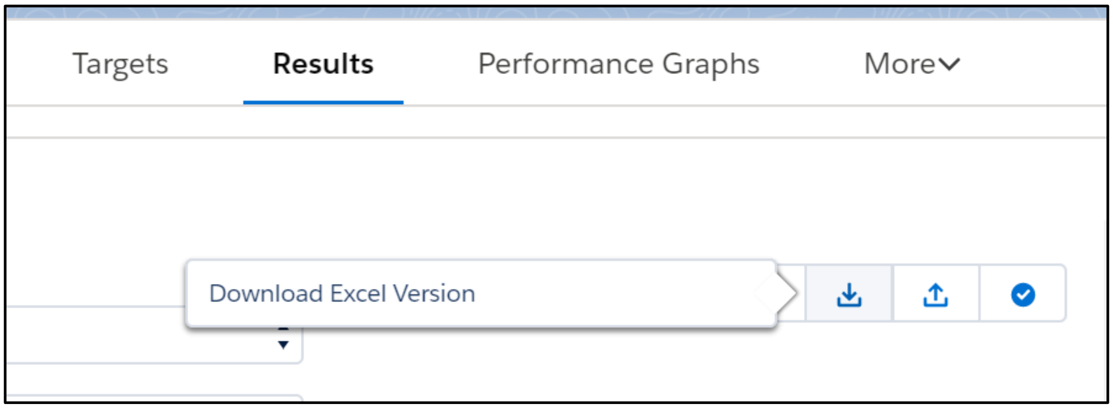


2. Expanding more filters enables funders to search indicators by thematic area, project objectives, data type, and indicator type.



Download an Excel file to Review Results Offline

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



2. Click Generate.

3. Confirm the download.

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

Education Investments & Grants - Q1 - Haryana - Results

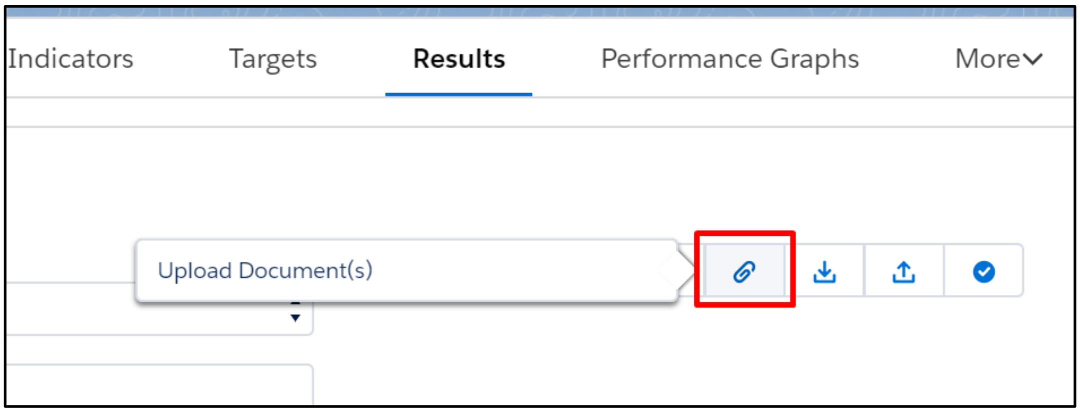
Generated by: User User 10/1/2019 1:52 AM

Objective(s)	Guideline	Indicator	Disaggregation	Total		Comments
				Target	Result	
	Track the testing scores	Increase English scores		100	55	
		Increase in French scores		100	90	
		Increase in Hindi scores		100	65	

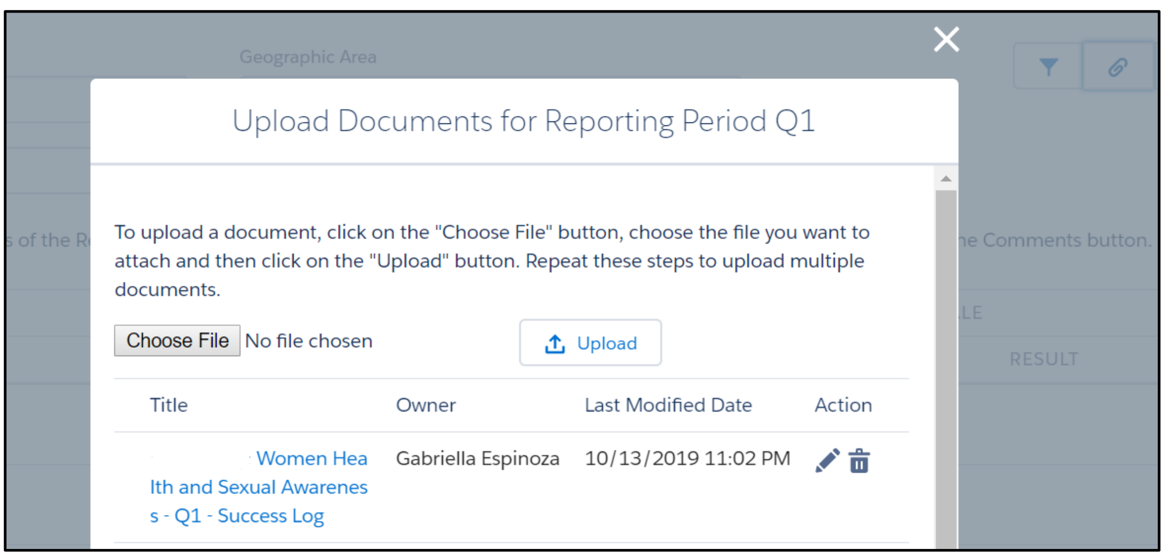
Review supporting documents

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

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



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



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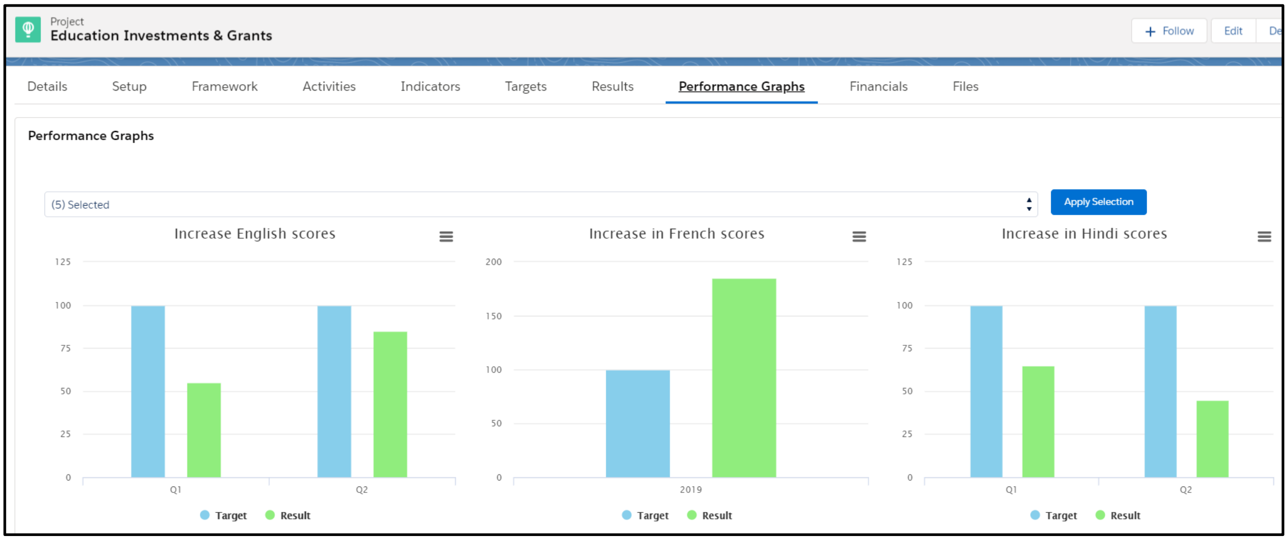
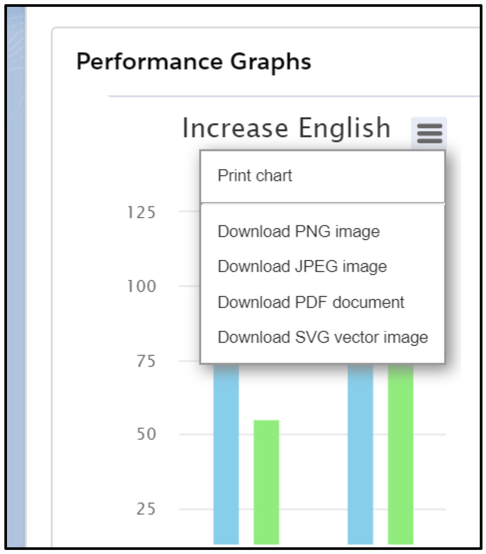
Review Results Reported for all Reporting Periods

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



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

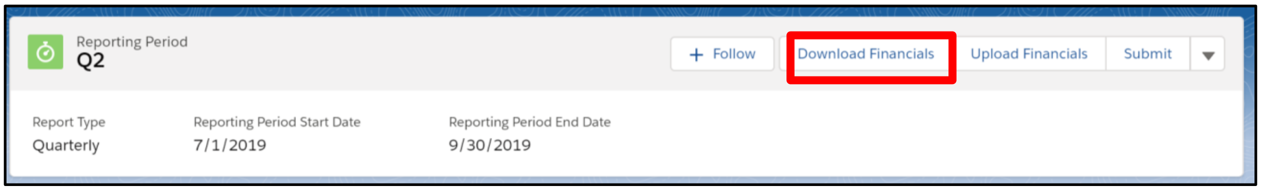


Review a Grant Report - Financials

Funders can view planned amount vs. actual amount financials.

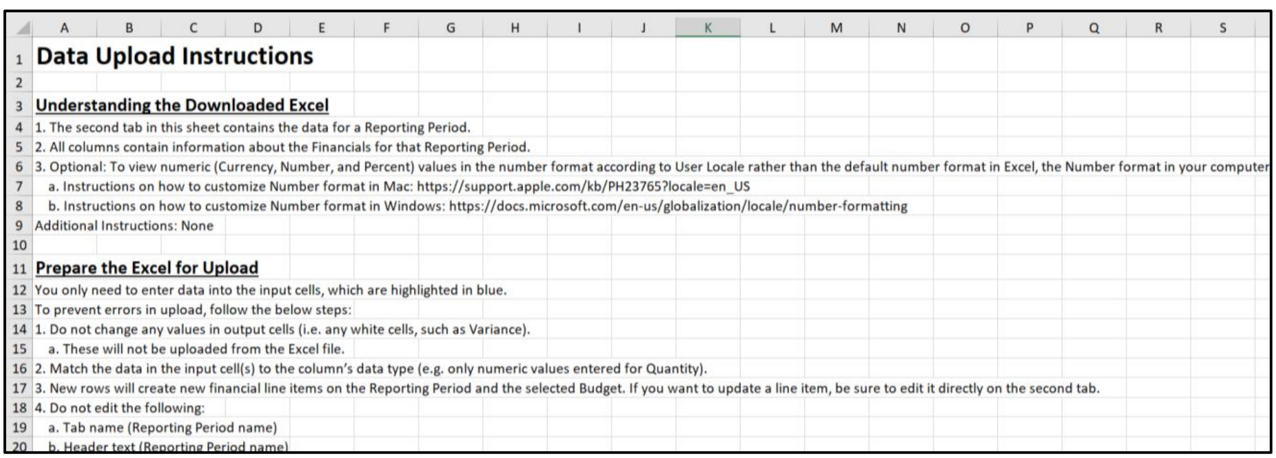
1. Navigate to the desired reporting period record.

2. On the top right corner, click *Download Financials*, as shown below.



3. Upon opening the downloaded Excel spreadsheet, funders may view two tabs:

    a. Tab 1 - “Instructions” - shown below: this tab outlines how to enter data in a compatible format to upload the data onto the Budget page. All of the instructions are controlled by custom labels and can be edited to include customized or additional instructions.



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

	A	B	C	D	E	F	G	
1	**Financial Inclusion - 2019 Annual**							
2	Generated by: Gabriella Espinoza 10/18/2019 5:16 AM							
3	**Name**	**Type**	**Category**	**Subcategory**	**Description**	**Amount Planned**	**Amount Actual**	**Cost p**
4	Materials and Sup	Expenditure	Office		Promotional assets	4500	5000	
5	Staff Compensatio	Expenditure	Personnel	Salaries	Base pay excluding	325000	320000	
6	Domestic travel	Expenditure	Travel	Transport	Roundtrip flight to	6725	7000	
7								
8								
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Instructions | 2019 Annual

Review a Grant Report - Narrative

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

View and/or Modify Narrative Report Response

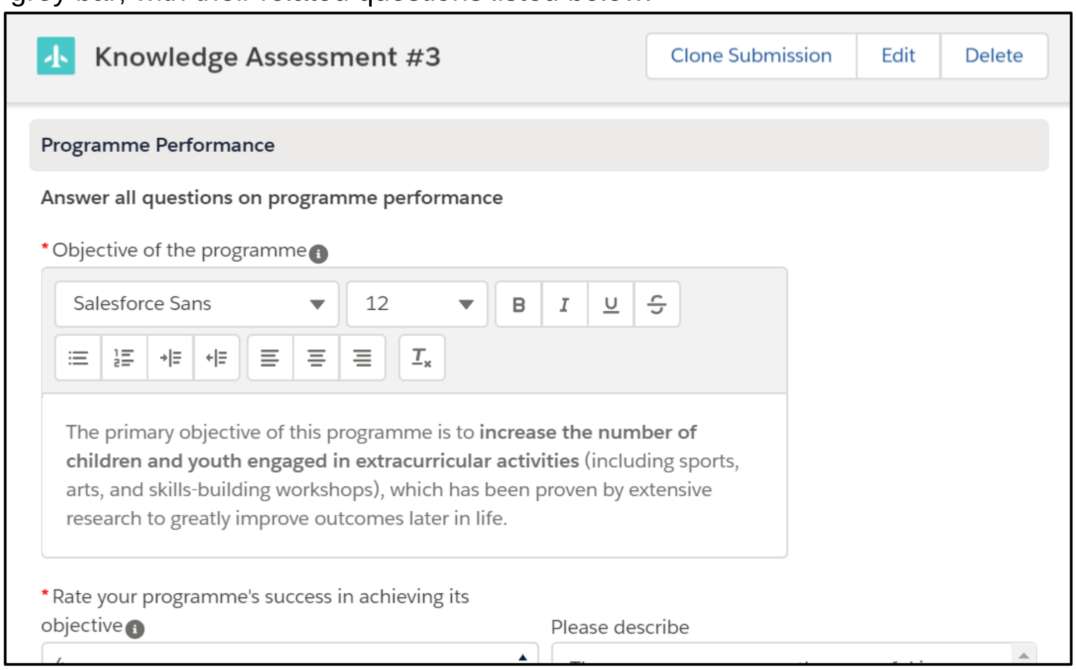
Once the narrative response has been submitted for review, funders can open, view, and modify the submission.

1. Navigate to Submissions from the main menu.

2. Open a Narrative Report response record that has been submitted for review.

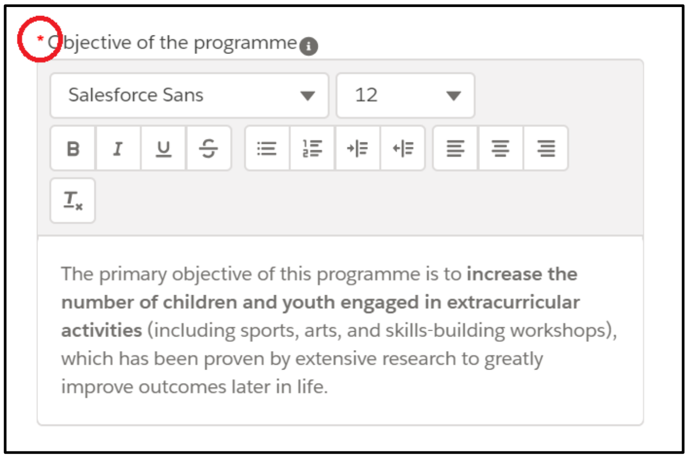
3. Click on the Response tab.

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

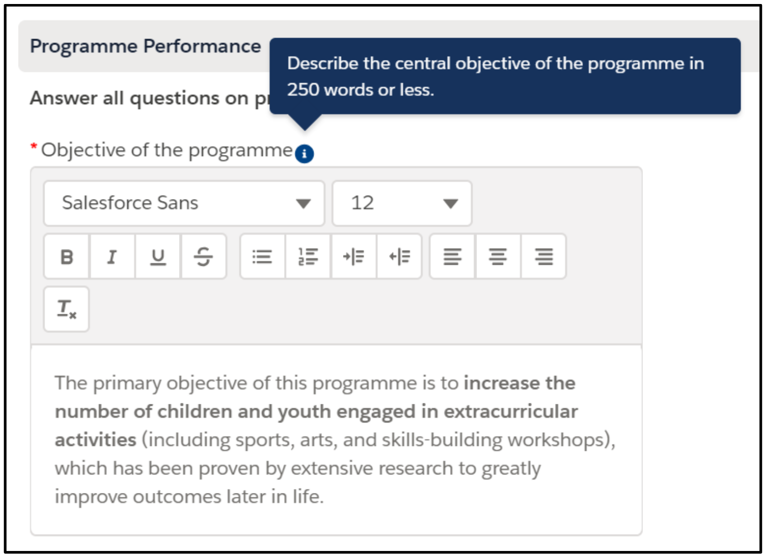


    a. If a section has defined instructions (i.e. ampi__Instructions__c is populated on the ampi__Section__c record), those appear directly below the grey bar and above the section's questions.

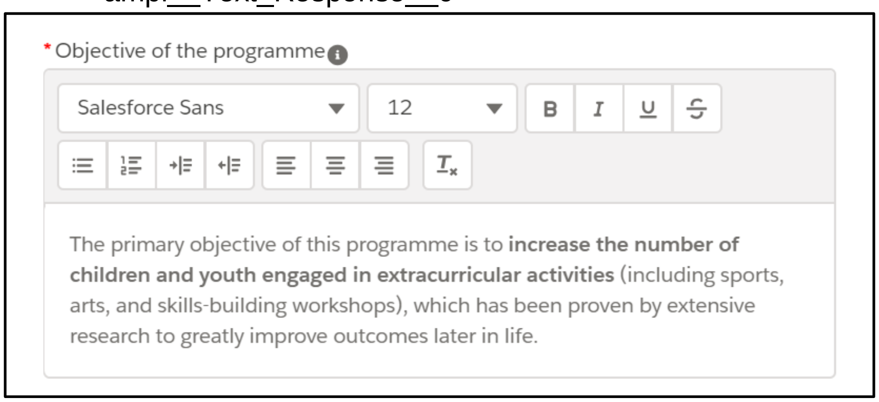
5. Check if a question is required (i.e. ampi__Required__c is TRUE on the ampi__Question__c record) by noting whether or not it has a red asterisk displayed next to it.



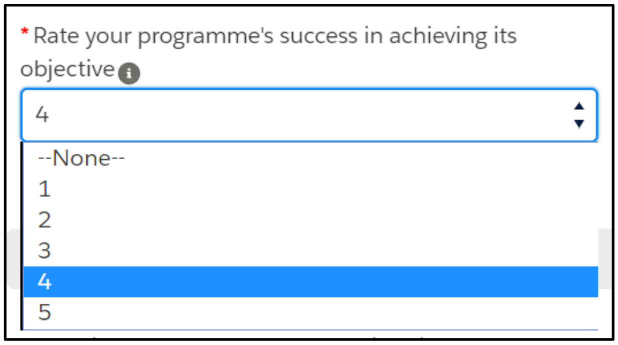
6. Check if a question has any special instructions/criteria (i.e. ampi__Instructions__c is populated on the ampi__Question__c record) by hovering over the info icon to expand the help text.



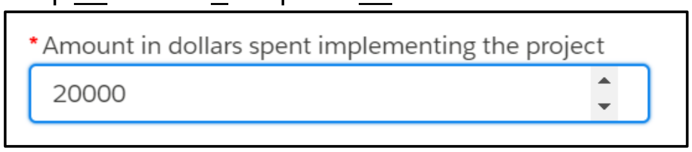
7. View/modify responses to questions depending on the questions' response types:
    a. Qualitative - responses can consist of text, images, and/or formatted tables
        i. Any qualitative values entered or changed are saved in ampi__Text_Response__c



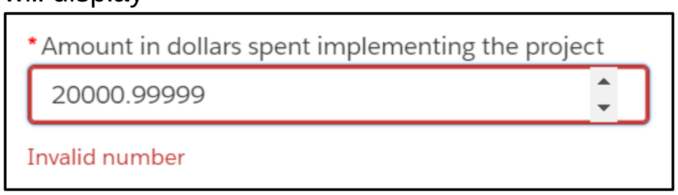
    b. Picklist - responses are a single value from the pre-defined picklist
        i. Any picklist values entered or changed are saved in ampi__Picklist_Response__c



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



8. View/modify comments or explanations to picklist or number answers.
   a. When a picklist or numeric question is created, users can decide to ask for supporting comments. For those questions, users will be able to type directly into a text input box displayed next to the picklist or number input box to provide additional information, or explanation.
   b. Any comments entered or changed are saved in ampi__Text_Response__c

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

A reviewer's ability to view or modify the response depends on the permissions that have been set for them on the Question object. For example, if the user has read-only access on the ampi__Picklist_Response__c, ampi__Number_Response__c, and ampi__Qualitative_Response__c fields, then the component will display as read-only.

Assign Scores to Answers in a Submission Review

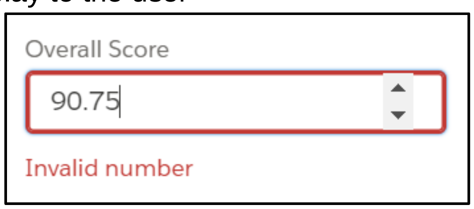
Alongside reading and modifying submitted responses, reviewers can assign scores to individual answers to questions, as well as overall scores to entire sections or the whole submission.

1. Open the Submission response record that has been submitted for review.
2. Click on the Review tab.
3. Assign an overall score to the entire submission.

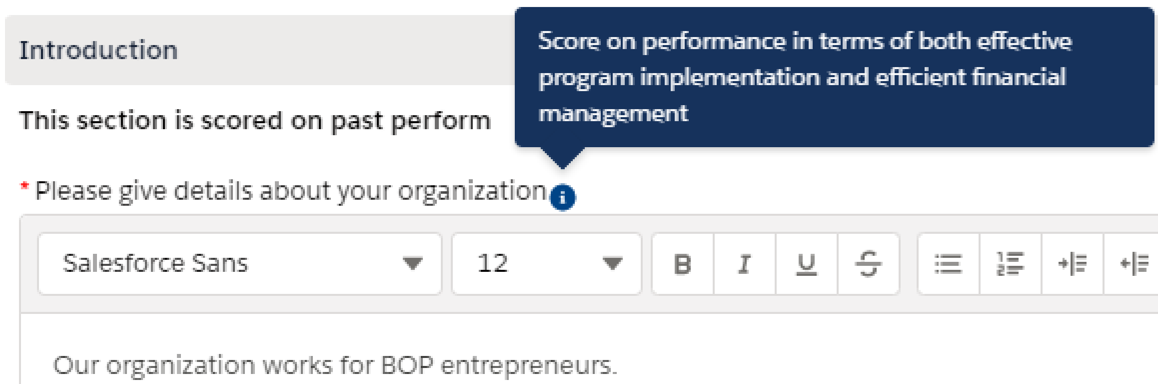
a. The Overall Score field is displayed at the top of the component, into which reviewers can directly enter a value with up to six whole number digits and one decimal value (i.e. total of eight characters, including the decimal marker).

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

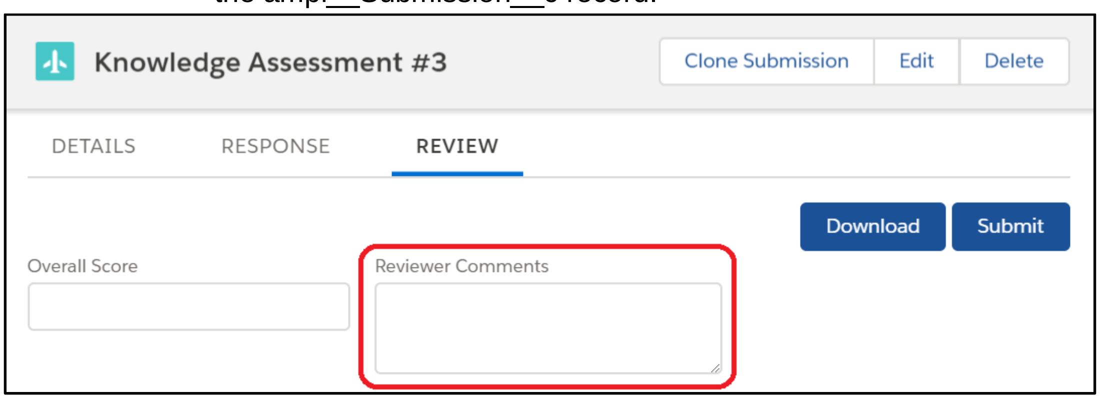
ii. If the value entered exceeds the digit or decimal count, an error message will display to the user



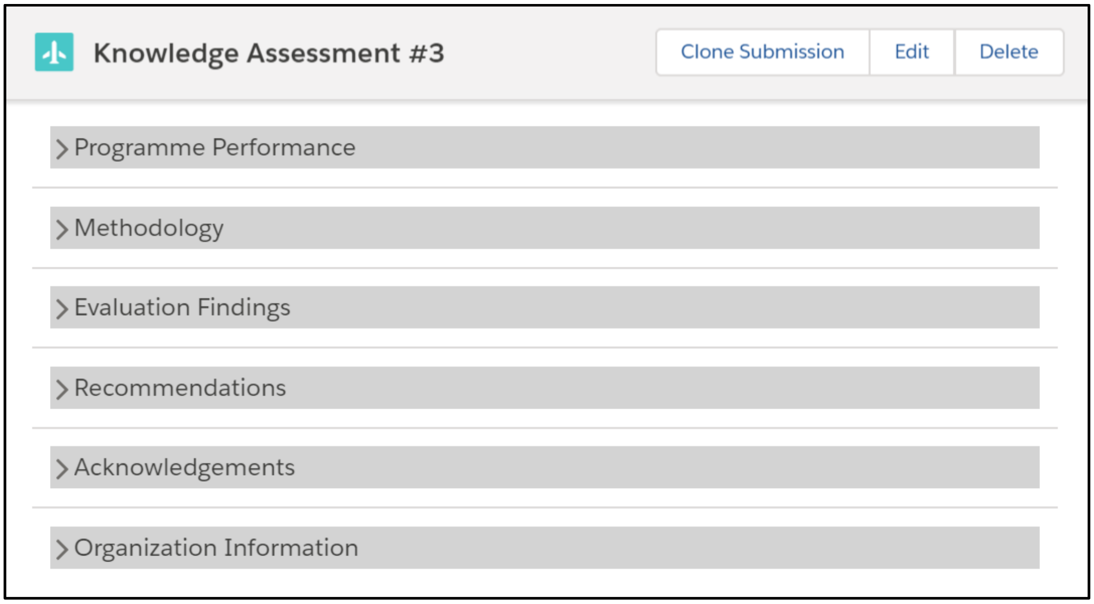
b. Check help text and instructions for the reviewer by hovering over the icon (Reviewer_Instructions__c field on Question__c and Section__c records) that provides scoring guidance per question. These instructions may be different from the instructions given to respondents. See screenshot below.



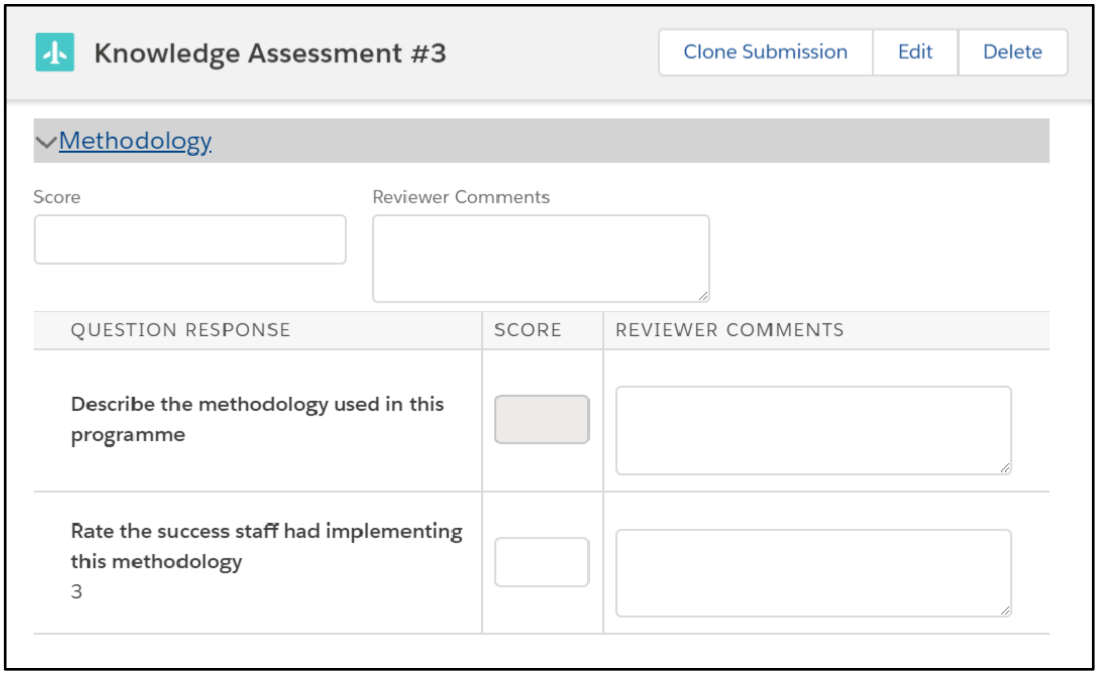
c. The Reviewer Comments field is displayed next to the Overall Score field at the top of the component. Reviewers can directly enter a text value to provide additional context to the score assigned to the submission.
    i. The text value entered is saved in ampi__Reviewer_Comments__c on the ampi__Submission__c record.



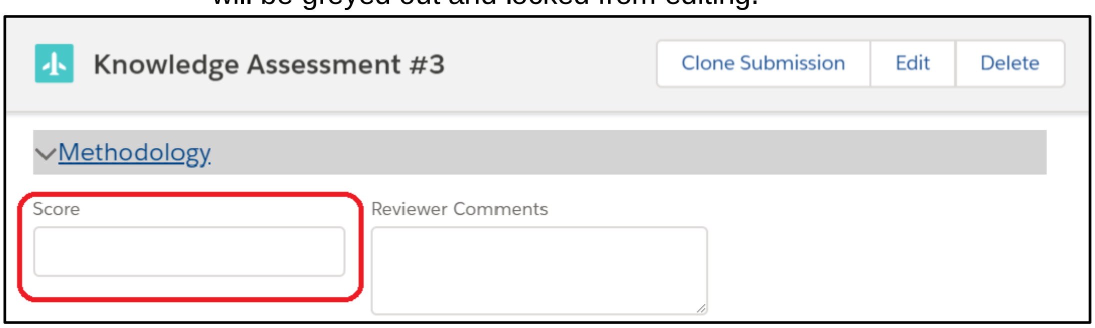
4. Assign an overall score for each individual section.
    a. If the submission is divided into sections, each section will appear in a horizontal grey bar, with their related questions listed below.



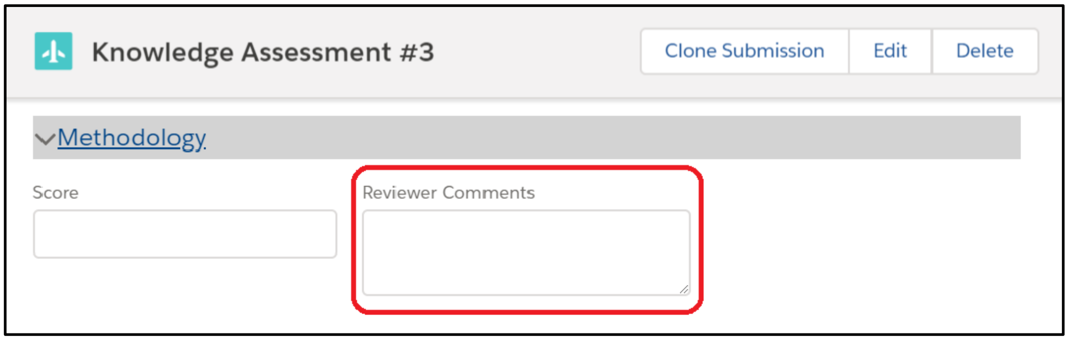
b. By default, all sections are collapsed, and their related questions are hidden. Expand a section and display its related questions by clicking on the section's grey bar. Only one section can be displayed at a time, and it can only be collapsed by expanding another section.



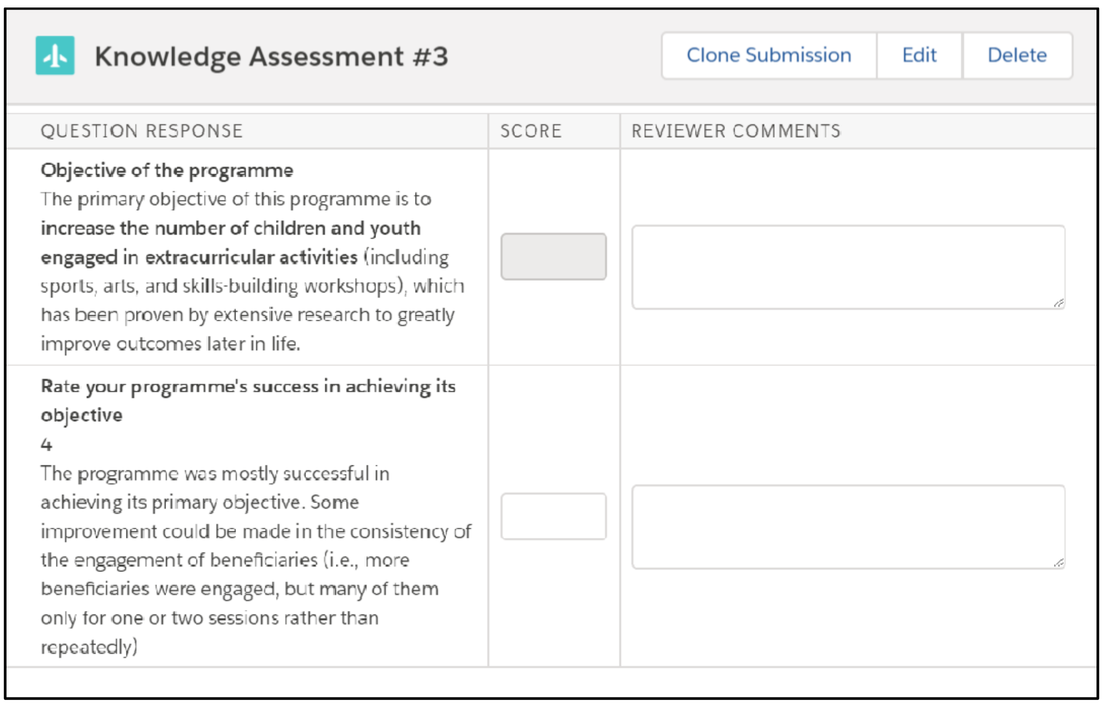
c. The Score field is displayed beneath the section's grey bar, and reviewers can directly enter a value with up to six whole number digits and one decimal value (i.e. total of eight characters, including the decimal marker).
   i. The number value entered is saved in ampi__Score__c on the ampi__Section__c 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)

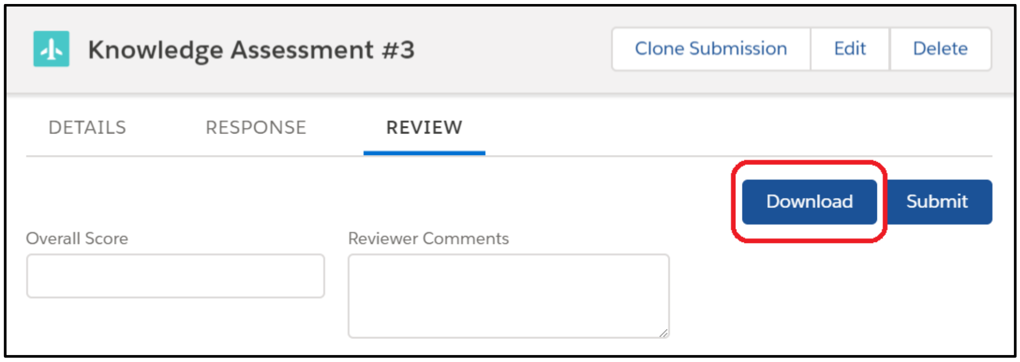
ii. Score: Contains input boxes into which reviewers can assign a score to the question response
   1. Reviewers can directly enter a value with up to six whole number digits and one decimal value (i.e. total of eight characters, including the decimal marker).
   2. If the value entered exceeds the digit 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.

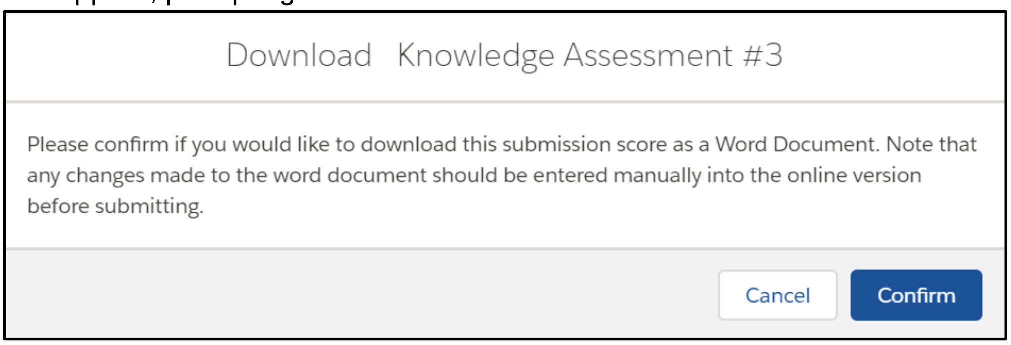
Once scores have been entered, users can either download scores as a Word document or submit their scores for a final review.

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

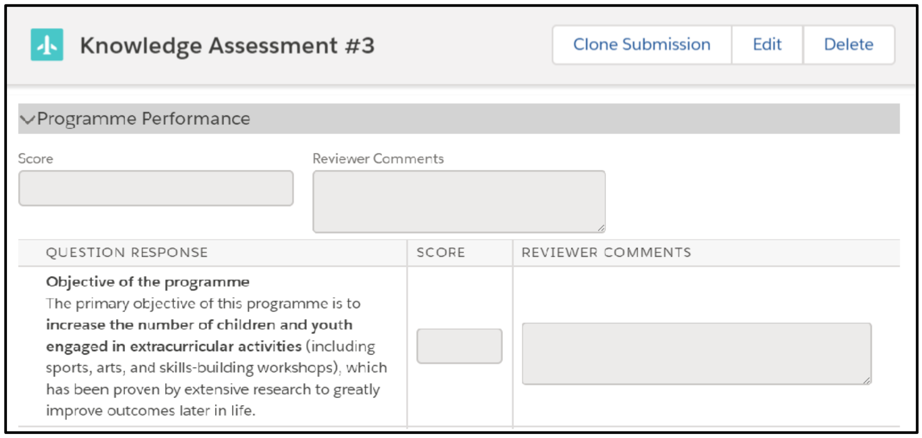
- If a reviewer comment value has not been entered, an input box with placeholder text will be displayed in the Word document.

Submit the Final Submission Review

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

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

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
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.