

Implementation Plans and Activities User Guide

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Overview

The Activities Lightning Web Component enables project managers to create, manage, and track progress for Activities in an Implementation Plan by displaying a Gantt chart view of all the Activities within that Implementation Plan.

In this user guide, you will learn how to:

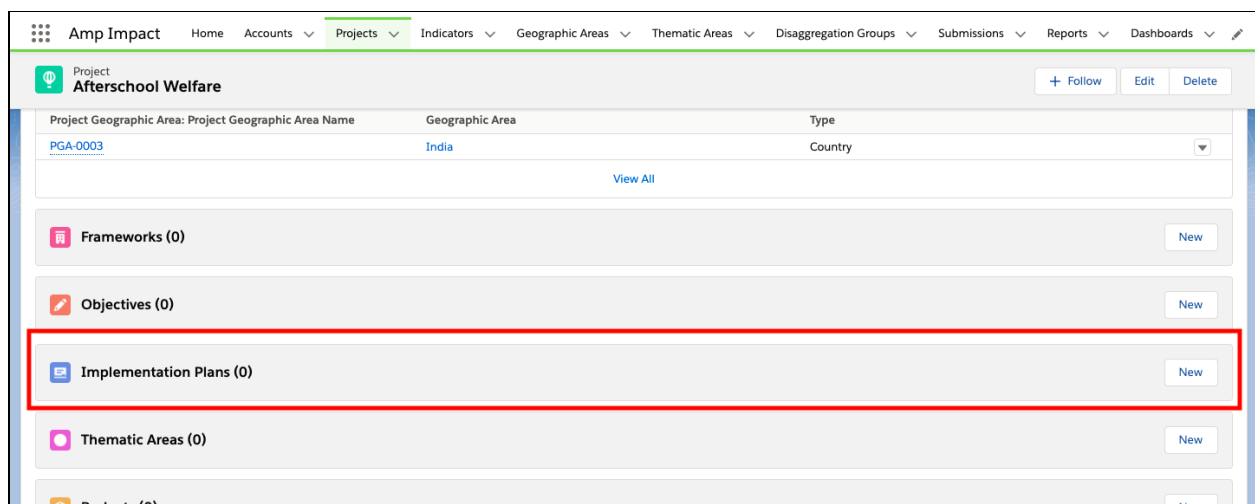
- Create an Implementation Plan
- Add activities to an Implementation Plan
- View activities in one or more Implementation Plans
- Track percent complete and progress on an activity
- Reschedule activities via drag and drop
- Filter the display of activities
- Customize the color coding of activities

 To learn about how to set up Amp Impact in your org, refer to the Amp Impact Installation Guide

Create an Implementation Plan for a Project

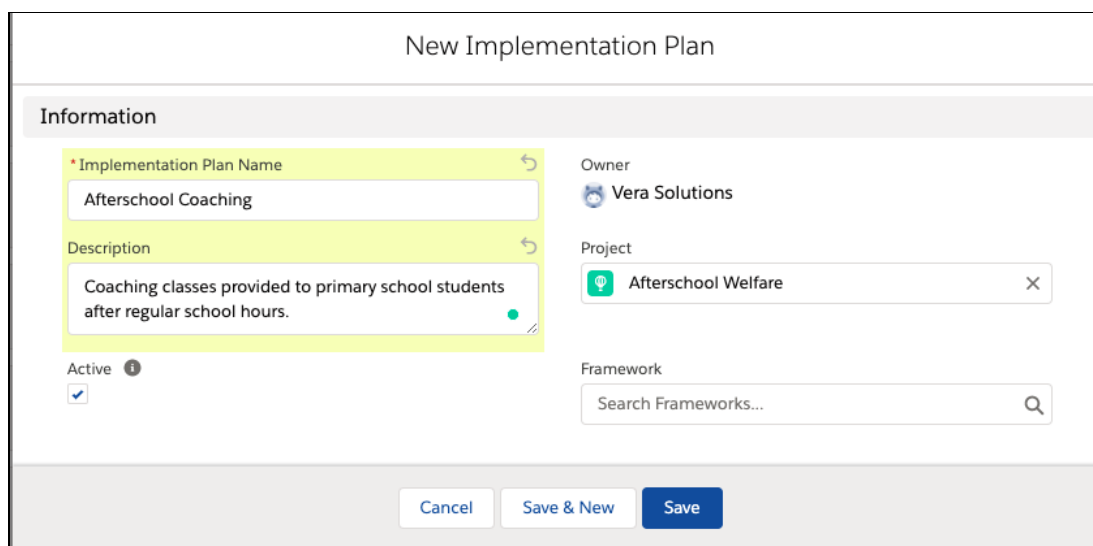
You can track the progress of a project's implementation with the Implementation Plan. A single Implementation Plan consists of numerous Activities to be carried out for the plan to be considered complete.

You can create an Implementation Plan by scrolling down on the Setup tab within a Project and clicking on the 'New' button on the Implementation Plans related list.



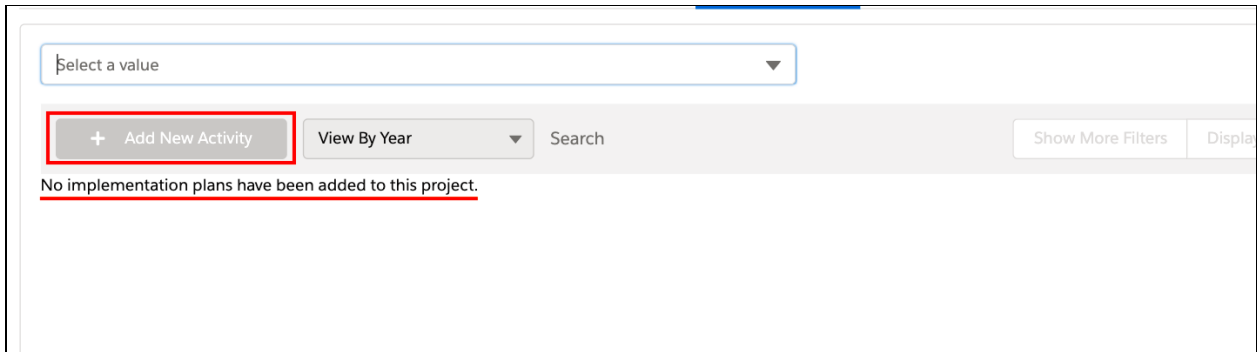
The screenshot shows the Amp Impact dashboard for a project named 'Afterschool Welfare'. The navigation menu includes Home, Accounts, Projects, Indicators, Geographic Areas, Thematic Areas, Disaggregation Groups, Submissions, Reports, and Dashboards. The main content area displays a table with columns for Project Geographic Area, Project Geographic Area Name, Geographic Area, and Type. Below the table, there are sections for Frameworks (0), Objectives (0), Implementation Plans (0), and Thematic Areas (0). The 'Implementation Plans (0)' section is highlighted with a red box, and a 'New' button is visible next to it.

Once you fill out the required fields Implementation Plan Name and Project you can click on the Save button to create the Implementation Plan.



The screenshot shows the 'New Implementation Plan' form. The form is titled 'New Implementation Plan' and has an 'Information' section. The 'Implementation Plan Name' field is highlighted in yellow and contains the text 'Afterschool Coaching'. The 'Description' field is also highlighted in yellow and contains the text 'Coaching classes provided to primary school students after regular school hours.' The 'Active' checkbox is checked. The 'Owner' field is set to 'Vera Solutions'. The 'Project' field is set to 'Afterschool Welfare'. The 'Framework' field is empty with a search bar. At the bottom of the form, there are three buttons: 'Cancel', 'Save & New', and 'Save'.

The message “No implementation plans have been added to this project.” appears within the Activity Table on the Activity tab of a Project if no Implementation Plan has been added to the project. You must create an Implementation Plan in order to be able to create Activities.



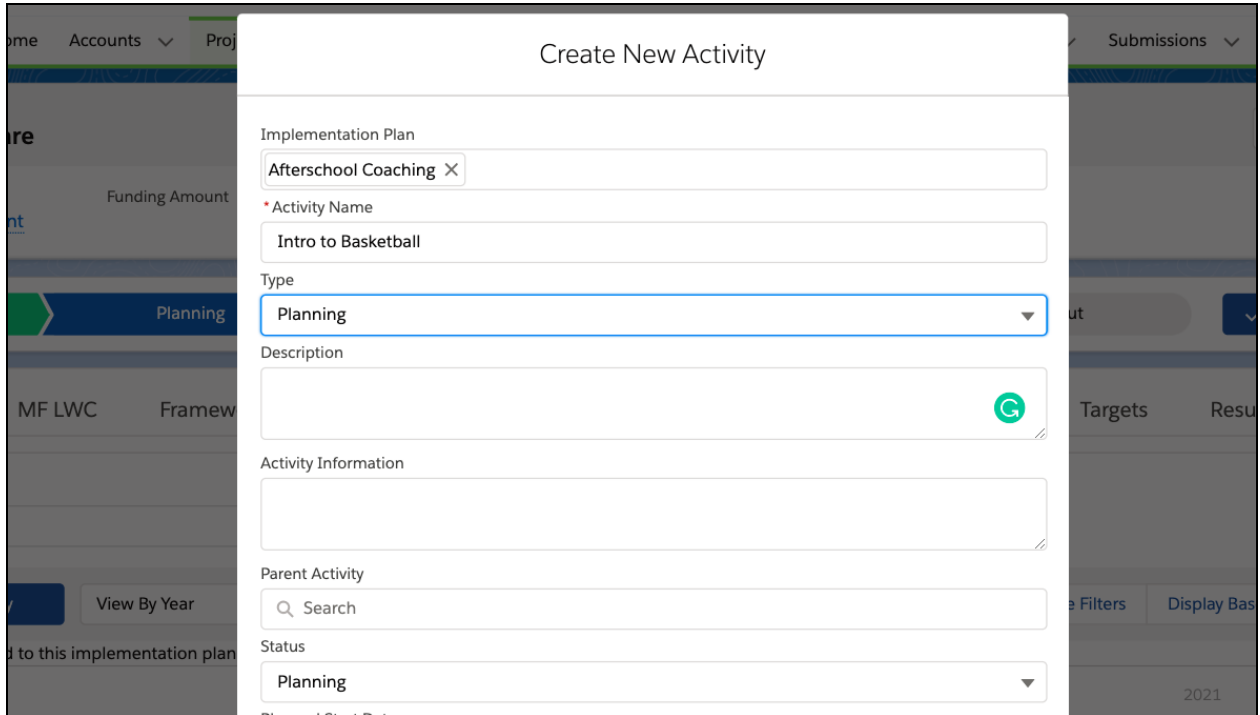
The screenshot shows a web interface for an Activity Table. At the top, there is a dropdown menu with the text "select a value". Below this, there is a toolbar with several buttons: a red-bordered button with a plus sign and the text "+ Add New Activity", a "View By Year" dropdown menu, a "Search" input field, and a "Show More Filters" button. Below the toolbar, a message is displayed: "No implementation plans have been added to this project." This message is underlined in red.

Add/Edit/Remove Activities in an Implementation Plan

Add an Activity to an Implementation Plan




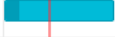
You can add an Activity to any Implementation Plan that belongs to a Project from the Activities tab. Within the Activities tab, after selecting an Implementation Plan from the picklist, and clicking on “Add New Activity”, you can start building out that Implementation Plan. A pop-up will appear so that a new Activity record can be defined and created.

System Administrator Note: The fields in the popup are defined and can be customized using the CREATE_NEW_ACTIVITY_POPUP field set on the Activity__c object.








Only the Implementation_Plan__c and Name fields are required for the Activity to save successfully. Optionally, you can also:

1. Select the 'Activity Type'
2. Add an 'Activity Description'
3. Add 'Activity Information'
4. Link a 'Parent Activity' with the current Activity
 - All the sub-activities appear beneath the Parent Activity within the activity table. A chevron associated with the Parent Activity enables you to hide and display and hide all the sub-activities.

NAME	TYPE	STATUS	2021	
			JAN	FEB
Cricket Coaching	Training	In Progress		
<ul style="list-style-type: none"> ▼ Basketball Coaching Basketball Basic Advanced Basketball 	Training	Planning		
	Training	Complete		
	Training	Planning		

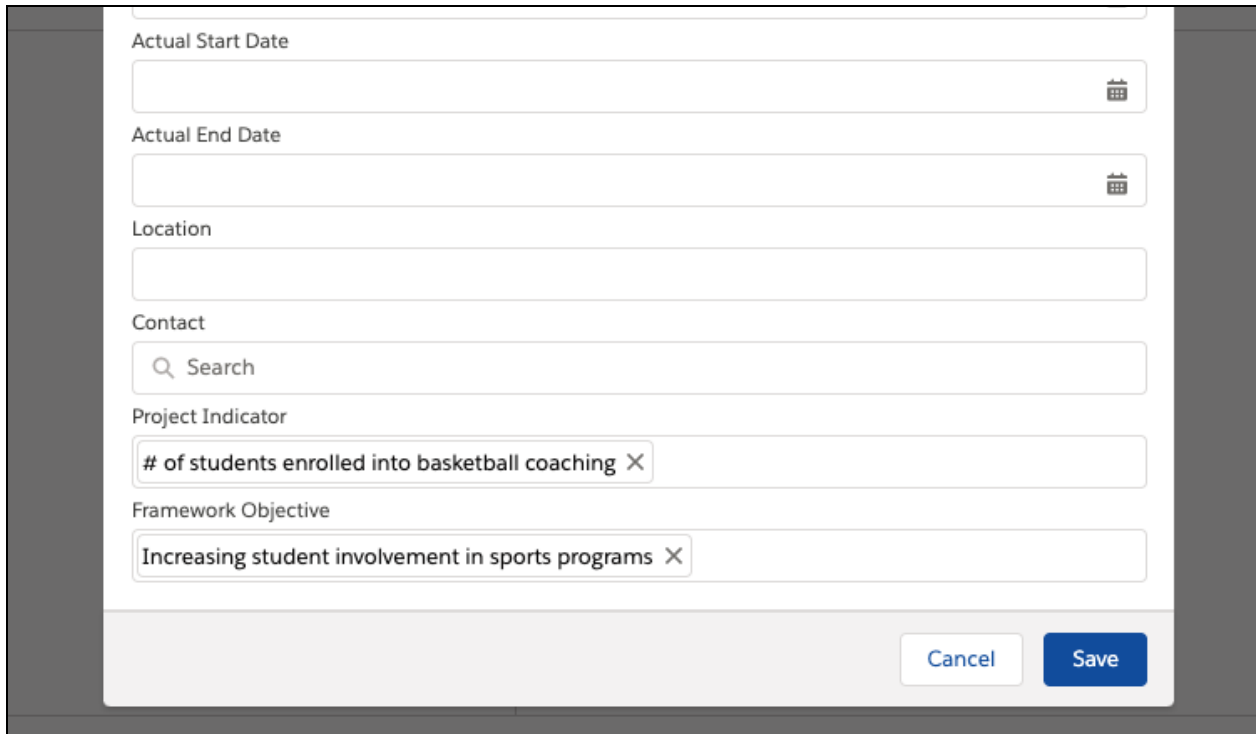
- You can create Cascaded parent-child relationships by adding a sub-activity to a Parent Activity that is a sub-activity to another Parent Activity.

NAME	TYPE	STATUS			
			JAN	FEB	MAR
<ul style="list-style-type: none"> ▼ Sports Coaching Cricket Coaching ▼ Basketball Coaching Basketball Basic Advanced Basketball 	Training	Planning			
	Training	In Progress			
	Training	Complete			
	Training	Planning			

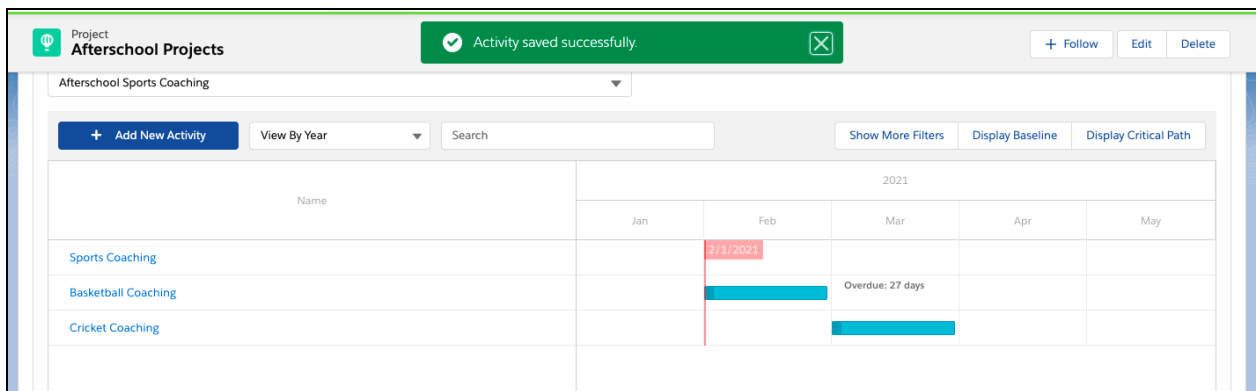
- You can remove a Parent Activity from a sub-activity from the Edit Activity pop-up.
5. Select the 'Activity Status'
 6. Fill out the Planned and Actual dates based on the schedule of the activity. These fields determine how timeline bars appear on the Activity Gantt Chart:
 - If both Start and End Dates are filled out, a horizontal timeline bar will appear on the Gantt Chart
 - If either the Start or End Date is filled out then a tick representing the date will appear on the Gantt Chart
 - The Baseline bar that showcases the duration between Planned Start Date and End Date will only appear if you click on the Display Baseline button
 7. Add a 'Location' for the Activity

Additionally, Activities can be related to a Framework Objective, a Project Indicator, and/or a Contact by filling out the relevant field when creating an Activity.

- The relevant record (e.g. a Contact record) must be created first before an Activity can be related to that record.
- Once the relevant record is created, the User can click into the field (e.g. Contact) in the popup and select the record from the picklist that is displayed.
- When you click into Framework Objective or Project Indicator lookup fields, only Framework Objectives and Project Indicators associated with the current Project are displayed in the dropdown list of choices.
- When an activity belongs to an Implementation Plan related to a Framework you can only relate Framework Objectives that belong to that specific Framework to the Activity. Otherwise if an Implementation Plan is not linked to a specific Framework then you can relate any Framework Objective to the Activity



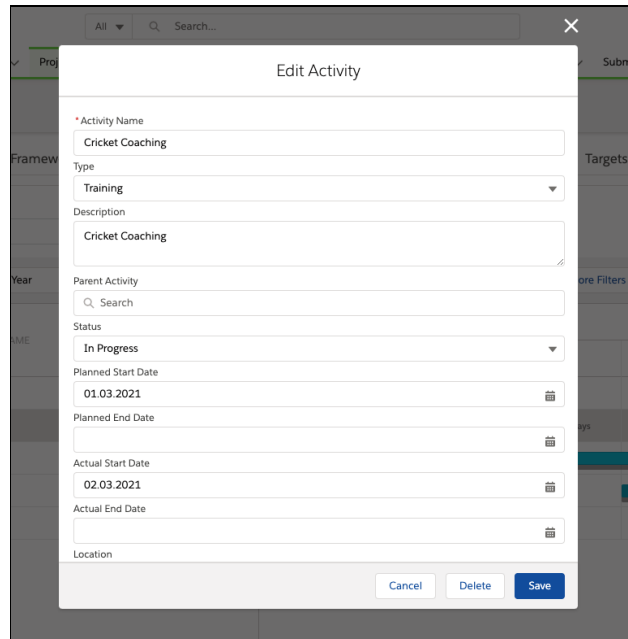
- When you click on the Save button, an activity will be created and success message will be displayed



Name	2021				
	Jan	Feb	Mar	Apr	May
Sports Coaching		2/1/2021			
Basketball Coaching			Overdue: 27 days		
Cricket Coaching					

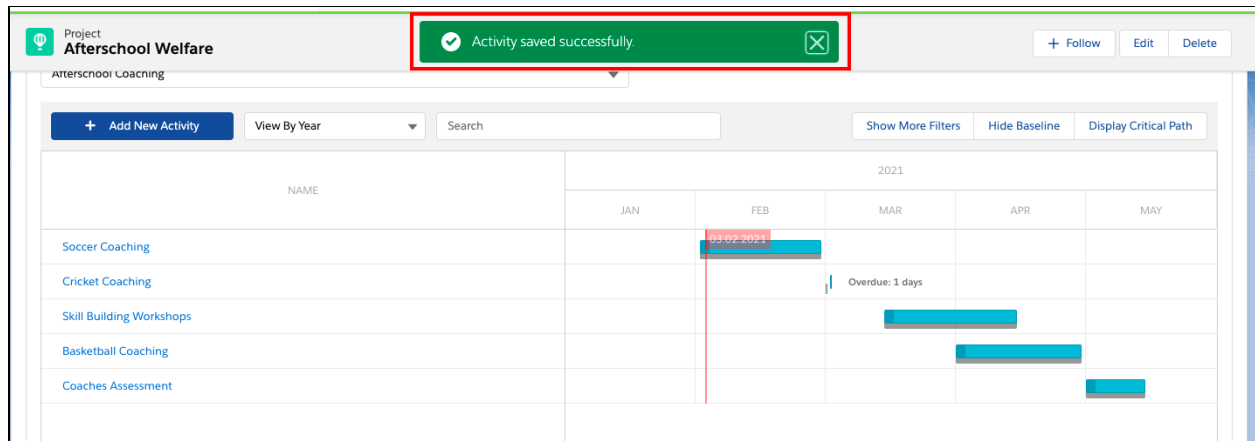
Edit an Activity in an Implementation Plan

To modify an Activity (for example, update its Status or mark the Actual End Date), you can double-click on the activity from the Activity Table. A pop-up will open up and you can edit the fields that appear on this popup.




System Administrator Note: The fields in the popup are defined and can be customized using the EDIT_ACTIVITY_POPUP field set on the Activity__c object.

- a. For the Timeline bars of an Activity to display, the date fields must be populated.
 - i. If both the start and end date fields - either planned dates or actual dates - are populated, then a full bar spanning the entire timeline of the Activity will be displayed.
 - ii. If only one of the Planned date fields (i.e. Planned_Start_Date__c or Planned_End_Date__c) is populated, then a grey tick mark will be displayed representing the populated date.
 - iii. If only one of the Actual date fields (i.e. Planned_Start_Date__c or Planned_End_Date__c) is populated, then a blue tick mark will be displayed representing the populated date.
- b. When you click on the Save button, the updated fields will be saved and a success message will be displayed

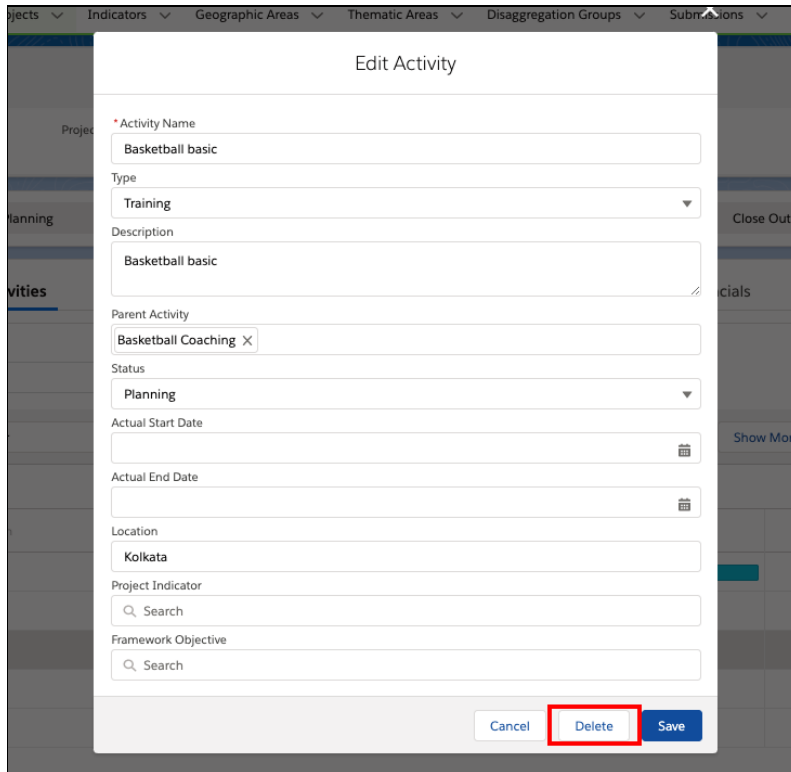


The color of the Planned timeline bar is Grey by default and the Actual timeline bar is Blue by default. However, if the System Administrator changes the colours assigned to these timeline bars then you will see them with the updated colors.

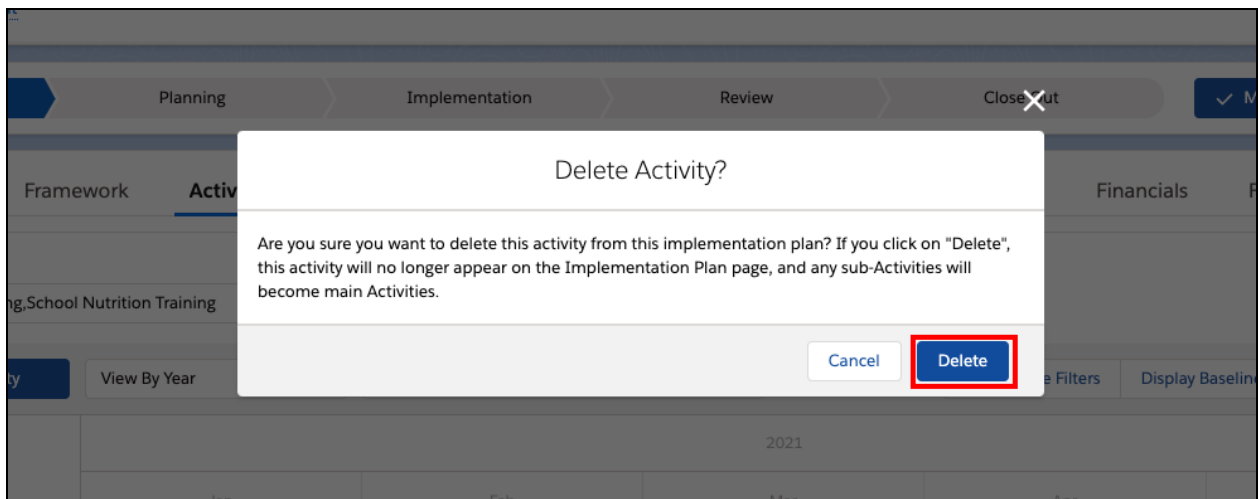
 To learn about how to customize colors of Activities Lightning Web Component to suit your organization's branding, refer to the Amp Impact Installation Guide

Remove an Activity from an Implementation Plan

To remove an Activity from an Implementation Plan, the User can double click on the activity from the activity list and click on the Delete button that appears on the edit activity pop-up.



Once the Delete button has been clicked, a pop-up will appear, requesting you to confirm the removal of the Activity.



After you confirm the removal of an Activity, the Activity is deleted and no longer displayed in the Activity Table. A success message displays to confirm the Activity's deletion.

Project **Afterschool Projects**

✔ Activity successfully deleted.
 ✕

Select Implementation Plan
 Afterschool Sports Coaching, School Nutrition Training

+ Add New Activity
View By Year

Show More Filters

Name	2021		
	Jan	Feb	Mar
<div style="display: flex; align-items: center;"> ▼ Sports Coaching </div>		2/1/2021	
Basketball Coaching		50%	Overdue: 27 days

System Administrator Note: To enable users to create this relationship between an Activity and a Project Objective, a Project Indicator, and/or a Contact, add the field(s) to the CREATE_NEW_ACTIVITY_POPUP and EDIT_ACTIVITY_POPUP field sets.

View Activities in an Implementation Plan

Activity Table

+ Add New Activity
View By Year

Show More Filters

Name	Status	Type	2021		
			Jan	Feb	Mar
<div style="display: flex; align-items: center;"> ▼ Sports Coaching </div>	Planning	Training		2/1/2021	
Soccer Coaching	Planning	Other		50%	Overdue: 27 days
Cricket Coaching	Planning	Training			Overdue: 28 days
Basketball Coachin	Planning	Training		50%	Overdue: 27 days
Nutrition Workshop fi	In Progress	Training		50%	
Nutrition Workshop fi	Planning	Other			Overdue: 28 days

The Activity Table displays all the Activities that are a part of the Implementation Plan(s) selected by the User.

System Administrator Note: The activity table column displays all the fields that have been added to the ACTIVITY_TABLE_COLUMNS fieldset

- The first column cannot be removed or rearranged in the table. It contains the values of Activity__c.Name, which are hyperlinked in blue. Users can click on the Name, and a new tab will open with the Activity Detail page.
- If the Activity Table is viewed in a Salesforce Community, the values in the first column will not be hyperlinked. Users can still modify Activities using the pop-ups in the Lightning Component.

The following dates can be tracked per Activity:

1. Planned start date
2. Planned end date
3. Actual start date
4. Actual end date

Based on these dates, the following formula fields are tracked:

1. Earliest start date - the start date associated with an Activity that happens first - the planned date or the actual date
2. Duration - the number of days tracked for an Activity based on the actual start and end dates.

View by Year, Month, Week

The View By toggle feature offers flexibility in terms of how you can view the Activity Gantt Chart. This toggle can be used to view activities in Year, Month, and Week views. By default, the Activity Table displays the Year view.

1. In View By Year, the table displays the Year view with the Timeline divided into years with month sub-units

Select Implementation Plan
Afterschool Sports Coaching

+ Add New Activity **View By Year** Search Show More

Name	2021			
	Jan	Feb	Mar	
Sports Coaching		2/1/2021		
Basketball Coaching		Overdue: 27 days		
Basketball basic				

- In View By Month, the table displays the Month view with the Timeline divided into Months with Day sub-units

Select Implementation Plan
Afterschool Sports Coaching

+ Add New Activity **View By Month** Search Show More

Name	2021														Feb	
	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14
Sports Coaching			2/1/2021													
Basketball Coaching			Overdue: 27 days													
Basketball basic																

- In View By Week, the table displays the Week view with the Timeline divided into Weeks with Day sub-units

Select Implementation Plan
Afterschool Sports Coaching

+ Add New Activity **View By Week** Search Show More

Name	31 Jan			01 Feb - 07 Feb							08 Feb - 14 Feb						
	ri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Su
Sports Coaching				2/1/2021													
Basketball Coaching				Overdue: 27 days													
Basketball basic																	

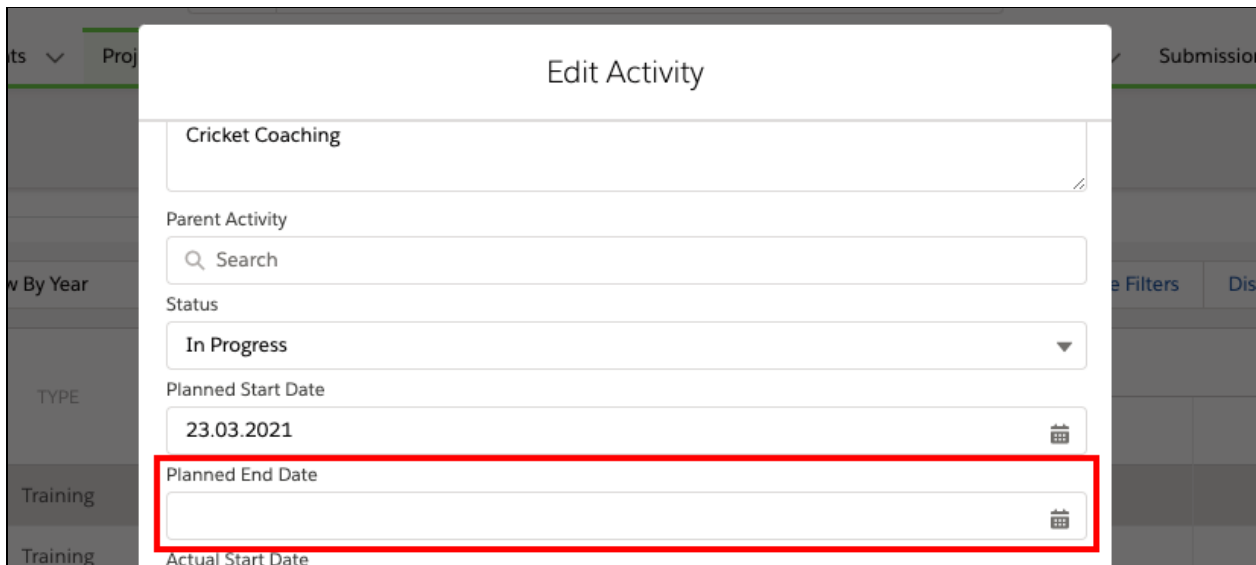
Activity Info Popover

When you hover the mouse cursor over an activity in the Activity Table, an info popover appears. The following fields are visible on the popover out-of-the-box:

1. Activity Name
2. Planned Start Date
3. Planned End Date
4. Actual Start Date
5. Actual End Date

For both the Planned and Actual fields, if the start date is empty and the end date has a value or vice-versa then both the start date and end date will be populated with the non-null value on the info popover. However, the Activity record will be created such that the empty field will have no value.

For example, the Cricket Coaching Activity in the screenshots below have a Planned Start Date Value of 23-03-2021 and no value for the Planned End Date



The screenshot shows an 'Edit Activity' popover for 'Cricket Coaching'. The form contains the following fields:

- Activity Name: Cricket Coaching
- Parent Activity: Search
- Status: In Progress
- Planned Start Date: 23.03.2021
- Planned End Date: (Empty field, highlighted with a red box)
- Actual Start Date: (Empty field)

The info popover shows the value of 23-03-2021 as the Planned Start Date and Planned End Date

NAME	TYPE	STATUS	Timeline	
			JAN	FEB
Cricket Coaching	Training	In Progress		07.02.2021
Basketball Activity Name: Cricket Coaching Actual Start Date: 01.02.2021 Actual End Date: 03.03.2021 Planned Start Date: 23.03.2021 Planned End Date: 23.03.2021	Training	Planning		
Advanced	Training	Planning		
Basketball Basic	Training	Complete		
Skill Building Workshops	Training	In Progress		

The Activity record does not show any value for the Planned End Date

Activity
Cricket Coaching

Description	Cricket Coaching	Status	In Progress
Type	Training	Parent Activity	
Location	Mumbai	Framework Objective	
Implementation Plan	Afterschool Coaching	Project Indicator	
Contact			
Activity Information			
Percent Complete	0%		

Schedule

Planned Start Date	23.03.2021	Actual Start Date	01.02.2021
Planned End Date		Actual End Date	03.03.2021

Alternatively, if both the start date and end and date fields have no value then the Planned and Actual fields do not appear on the info popover.

If you do not have access to any of the fields on the info popover, then their values will not appear when you view the info popover of a specific activity.

System Administrator Note: The activity info popover displays values of all the fields that have been added to the ACTIVITY_INFO_POPOVER field set.

<ul style="list-style-type: none"> ▼ Sports Coaching ▶ Basketball Coaching Cricket Coaching 	<div style="border: 1px solid red; padding: 5px;"> Activity Name: Basketball Coaching Actual Start Date: 2/1/2021 Actual End Date: 2/28/2021 Planned Start Date: 2/1/2021 Planned End Date: 2/1/2021 </div>	<div style="border-left: 1px solid red; border-right: 1px solid red; padding: 5px;"> 2/1/2021 </div>	<div style="border-top: 1px solid red; border-bottom: 1px solid red; padding: 5px;"> Overdue: 27 days </div>
--	---	--	--

View Activities across Multiple Implementation Plans

You can view Activities that belong to multiple Implementation Plans by selecting more than one Implementation Plan from the multi-select dropdown picklist. All the Activities from the Implementation Plans that you have selected displays within the Activity Table.

Initiated				Planning	Implementation	Review	Close Out	
Details Setup Framework Activities Risk Indicators Targets Results Performance Graphs Fir								
Select Implementation Plan <ul style="list-style-type: none"> ▼ Afterschool Sports Coaching, School Nutrition Training ✓ Afterschool Sports Coaching ✓ School Nutrition Training 								
Show More Filters								
Name				2021				
				Jan	Feb	Mar		
▼ Sports Coaching				2/1/2021				
▼ Basketball Coaching				Overdue: 27 days				
Basketball basic								
Cricket Coaching								

Expand and Collapse sub-activities

You can toggle between expanding and collapsing sub-activities of a Parent Activity by clicking on the chevron associated with the parent activity.

- Expanding sub-activities - On the first click on the chevron, the Activity Table displays all the sub-activities associated with the Parent Activity

	Jan	Feb	Mar
<div style="border: 1px solid red; padding: 2px;"> ▼ Sports Coaching </div>		2/1/2021	
▼ Basketball Coaching			Overdue: 27 days
Basketball basic			
Cricket Coaching			

- Hiding sub-activities - On the second click on the chevron, the sub-activity section collapses to hide the sub-activities associated with the Parent Activity

<div style="display: flex; justify-content: space-between; align-items: center;"> + Add New Activity View By Year ▼ <input type="text" value="Search"/> Show More Filters </div>			
Name	2021		
	Jan	Feb	Mar
<div style="border: 1px solid red; padding: 2px;"> > Sports Coaching </div>		2/1/2021	

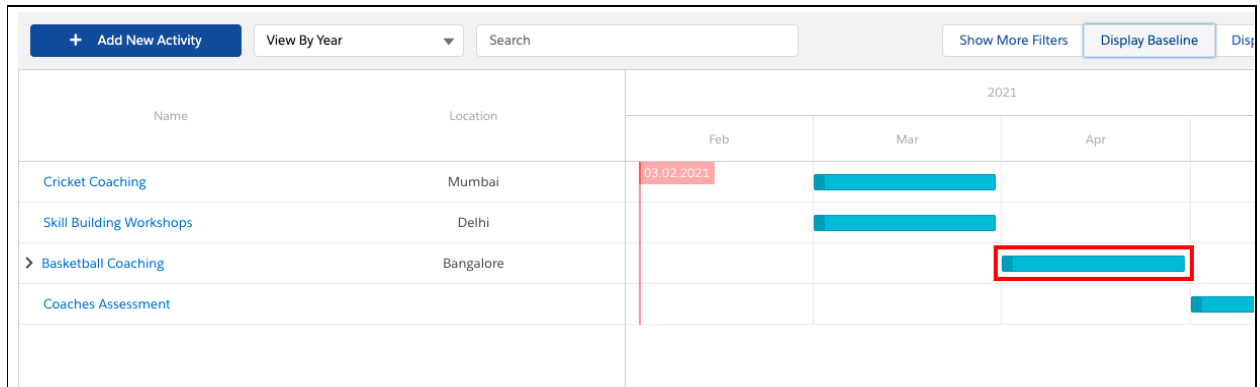
Toggle Baseline On/Off

You can toggle between the Hide/Display Baseline button to view and hide the timeline bar that depicts the duration between Planned Start Date and Planned End Date of all Activities that belong to the Implementation Plans that have been selected.

- Display Baseline - When you click on the Display Baseline button, the timeline bars associated with Planned Start date and Planned End date for all Activities become visible

<div style="display: flex; justify-content: space-between; align-items: center;"> + Add New Activity View By Year ▼ <input type="text" value="Search"/> Show More Filters <div style="border: 1px solid red; padding: 2px;">Hide Baseline</div> Dis </div>				
Name	Location	2021		
		Feb	Mar	Apr
Cricket Coaching	Mumbai	03.02.2021		
Skill Building Workshops	Delhi			
<div style="border: 1px solid red; padding: 2px;"> > Basketball Coaching </div>	Bangalore			
Coaches Assessment				

- Hide Baseline - When you click on Hide Baseline button, the timeline bars associated with Planned Start Date and End Date for all Activities become hidden

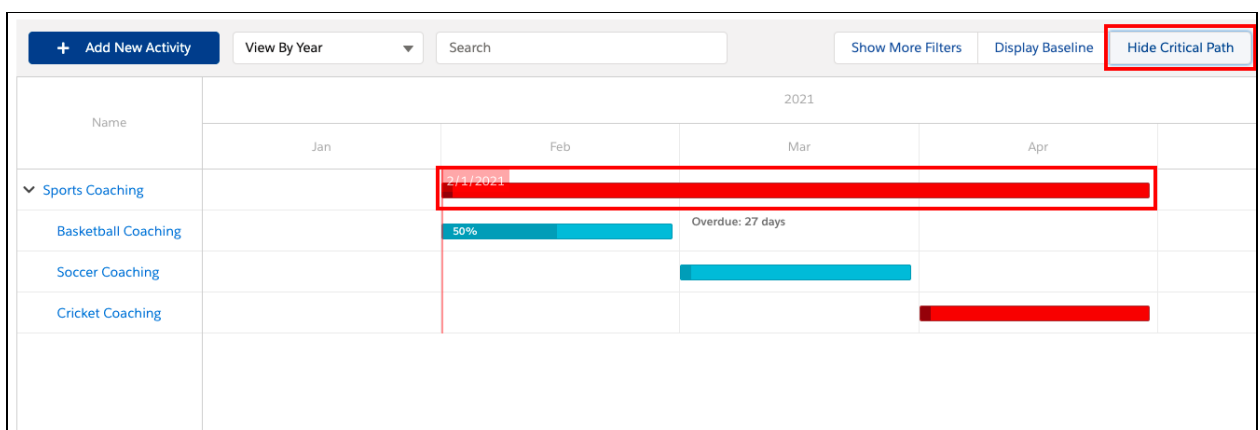


Toggle Critical Path On/Off

Critical Path is an Activity or a set of Activities within an Implementation Plan that must start and finish on time to ensure that the project ends on schedule. If the Critical Path gets delayed the entire project gets delayed. Critical Path also determines the shortest time a project can take to complete.

Within the Activities tab for a project, Users can toggle between the Display Critical Path and Hide Critical Path buttons to view and hide the Critical Path associated with the Implementation Plan that they have selected.

- Display Critical Path: When a User clicks on the Display Critical Path button, the Critical Path associated with the implementation plan gets highlighted in the Activities Gantt chart




- Hide Critical Path: When a User clicks on the hide Critical Path button, the Critical Path associated with the Implementation Plan is no longer highlighted in the Activities Gantt chart

+ Add New Activity		View By Year	Search	Show More Filters	Display Baseline	Display Critical Path
Name		2021				
		Jan	Feb	Mar	Apr	May
▼ Sports Coaching			2/1/2021			
Basketball Coaching			50%		Overdue: 27 days	
Soccer Coaching						
Cricket Coaching						


Refresh when updates on relevant pages affect Activities

When a User makes changes (add, edit, delete) to records that are related to activities and return to the activities page, the refresh banner informs the User that data has been modified and the page would have to be reloaded to display the updated information.

For example, if you update a project indicator on another page and return to the Activities page, then a refresh banner appears letting you know that data has been updated.


Amp Impact

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[Indicators](#)
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[Thematic Areas](#)
[Disaggregation Groups](#)
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[Reports](#)


Project
Afterschool Projects
+ Follow

⚠ This page has been updated. Please refresh the page for the latest information. [Refresh](#) ✕

Select Implementation Plan
 Afterschool Sports Coaching

Amp Impact
Activity

View By Year

Search

[Show More Filters](#)
[Display Baseline](#)
[Display](#)

Name		2021				
		Jan	Feb	Mar	Apr	May
▼ Sports Coaching			2/1/2021			
Basketball Coaching			50%		Overdue: 27 days	
Soccer Coaching						

The following changes affect the activities page:

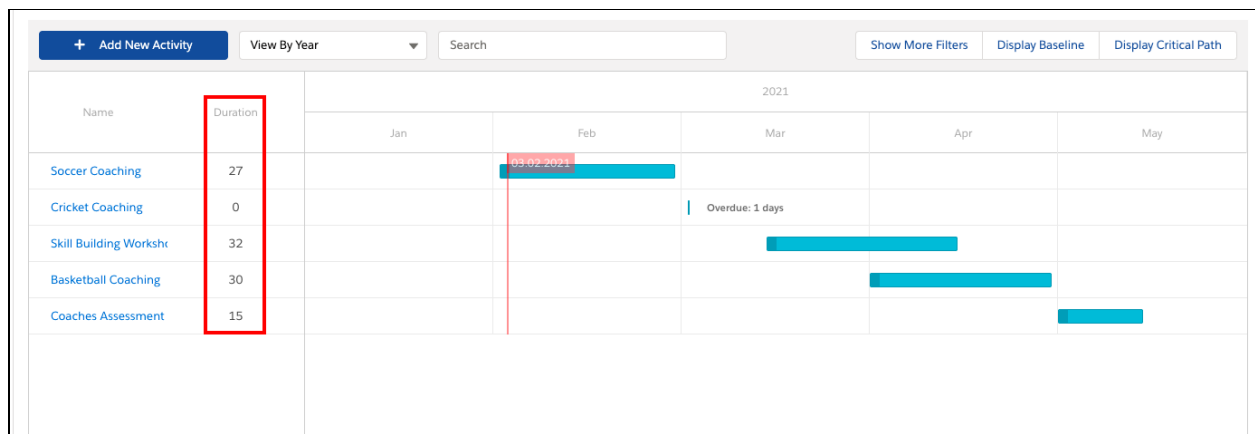
1. Add, edit, or delete operations on indicators (ManageIndicators page)
2. Add, edit, or delete operations on frameworks (ManageFrameworks page)

Track Progress of an Activity

Duration

The duration of an activity is the number of days between the Actual Start Date and Actual End Date. You can also view the duration of an Activity as the length of the Activity timeline bar on the Gantt Chart.

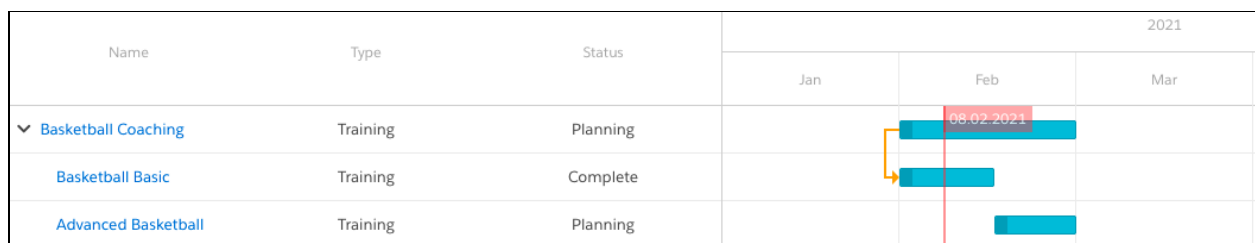
For activities that start and end on the same date, the duration value equals to 1 day. If an Activity has a start date but no end date, the duration value equals to 0.



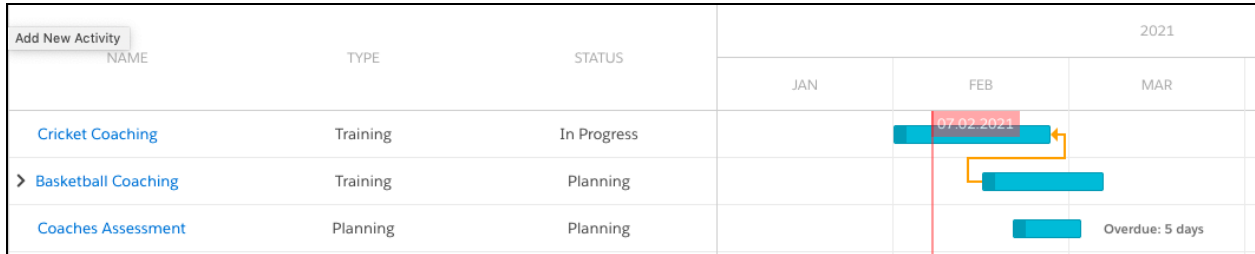
Activity Dependencies

Users can create, manage, and visualize dependencies between activities to mark whether one activity can only start based on the milestone (e.g. start, end) of another activity. A dependency is a link that is created between two activities that indicates that one activity can only start or end based on the other activity. There are four different types of dependencies that are possible:

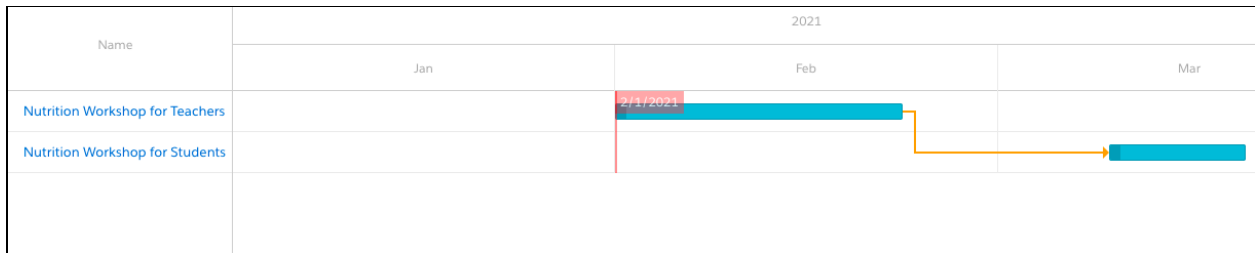
1. Start to start: This type of dependency between two activities indicates that one activity can only start after the other one starts



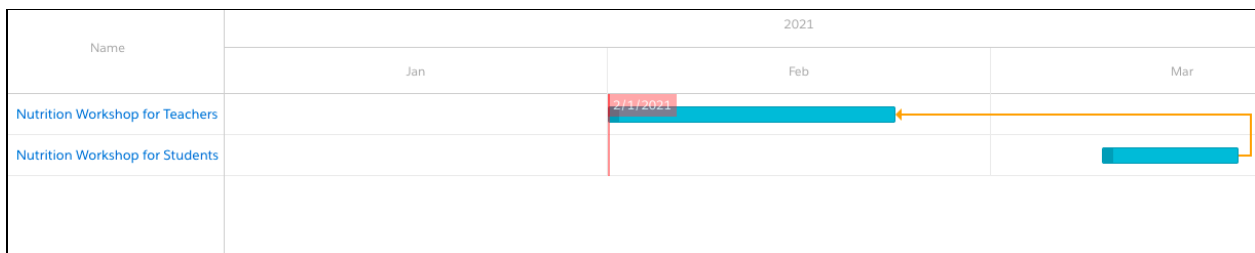
2. Start to finish: This type of dependency between two activities indicates that one activity can only finish after the other one starts



3. Finish to start: This type of dependency between two activities indicates that one activity can only start after the other one finishes



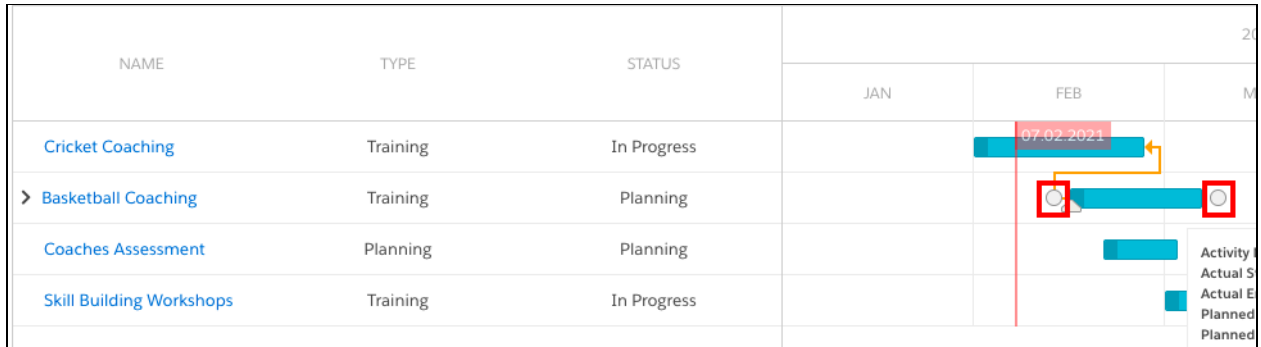
4. Finish to finish: This type of dependency between two activities indicates that one activity can only finish after the other one finishes



The line that represents activity links on the Activity Gantt Chart has a yellow colour by default. However, if the System Administrator changes the color associated with dependency links then you will see them with the newly assigned color.

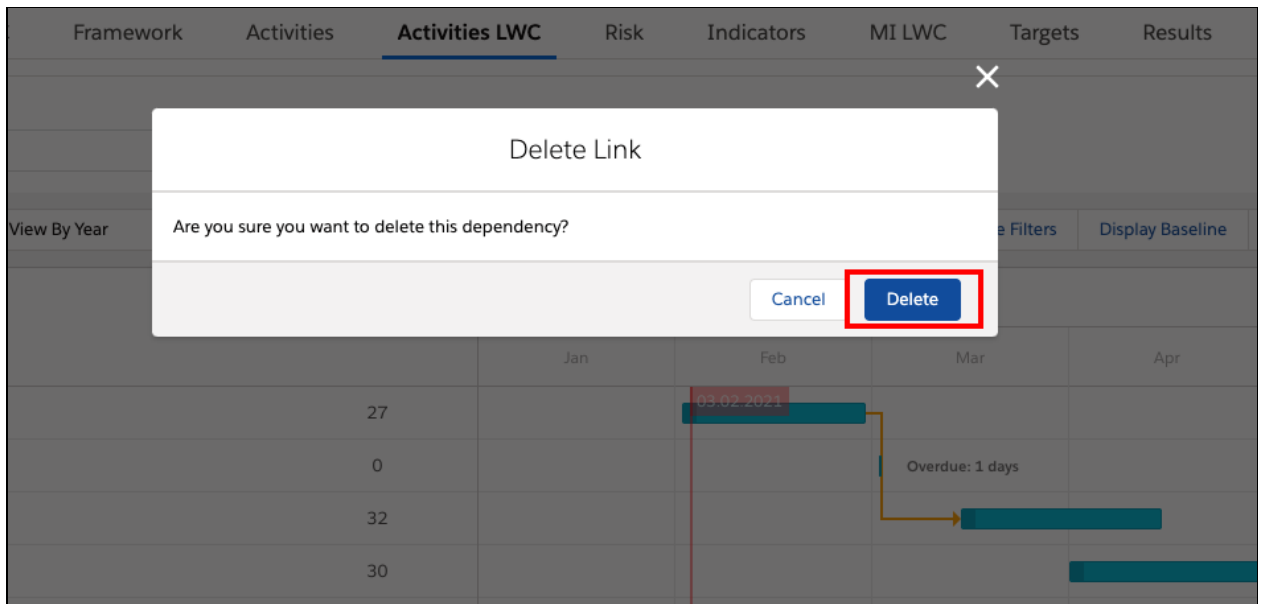
Adding a dependency

Users can add these dependencies directly in the Gantt chart by clicking on the leading Activity and dragging the dependency arrow to the following Activity.



Deleting a dependency

Users can delete a dependency in the Gantt chart by double-clicking on the specific dependency link that exists between two Activities and clicking on the 'Delete' button in the confirmation popup.



👉 Dependency type cannot be updated once a dependency is created. Instead, delete the activity dependency and create a new dependency to represent a different dependency type.

Drag and Drop Rescheduling

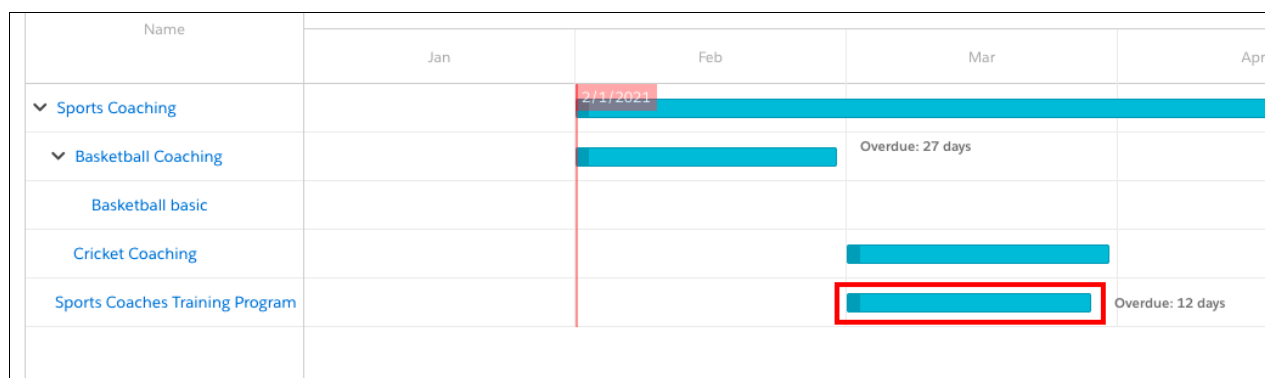
In the Lightning Web Component, you can click on the Activity's timeline bar within the Gantt Chart and drag horizontally drag it to a new place in the Implementation Plan's timeline to reschedule. You can only drag

and drop activities according to the vertical lines available on the Gantt Chart. Therefore, in the View by Year filter, it would only be possible to reschedule to the first of any given month. If you want more granular control over rescheduling you would have to toggle to View by Month or View by Week mode.

Before dragging Activity:



After dragging Activity:



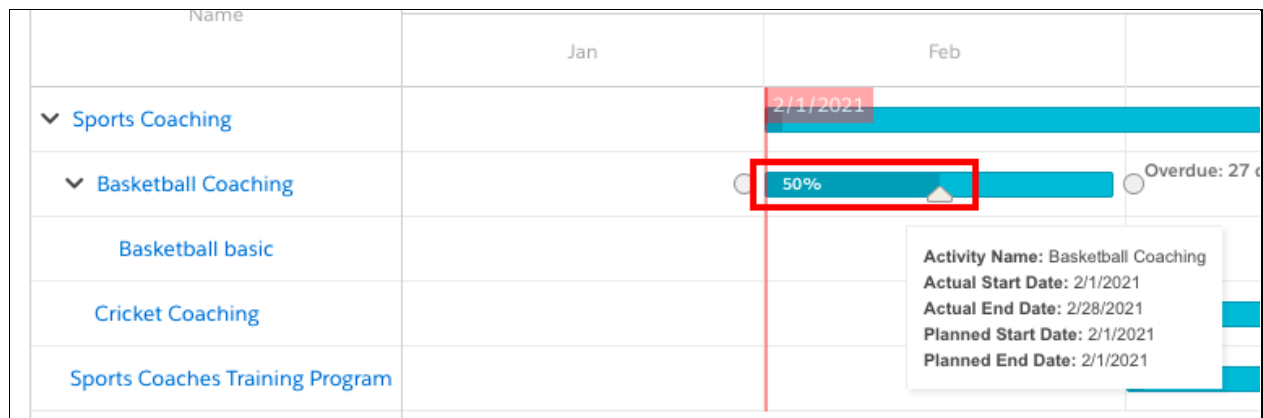
When you drag and drop activities to easily reschedule them, the Actual Start Date and Actual End Date associated with the Activity will be updated to reflect new values.

Track Percent Completion

Mark progress for an activity by filling in the timeline bar to indicate the percent completion.

1. You can define the Percent Complete field for an activity directly from the Gantt chart by hovering on top of an Activity, clicking, and dragging the slider that appears to the appropriate value
2. You can also add the Percent Complete field to the Edit/Create Activity pop-ups and set the value while creating or editing an Activity

3. The Percent Complete value is displayed on an Activity within the Gantt chart in the form of a progress text that appears on the timeline bar. Additionally, if there is a Percent Complete value, a portion of the timeline bar would have a darker colour as opposed to the default colour
4. By default, all activities have a Percent Complete value of 0



The color seen on the timeline bars may be customized depending on the colour values that have been set from the Lightning App Builder.





Critical Path

Critical Path is an Activity or a set of Activities within an Implementation Plan that must start and finish on time to ensure that the project ends on schedule. If the Critical Path gets delayed the entire project gets delayed. Critical Path also determines the shortest time a project can take to complete.

Define and visualize the critical path of an Implementation Plan, by tracking the set of activities that must start and finish on time in order to ensure the Implementation Plan ends on schedule.

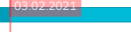
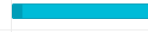


1. The Critical Path will be automatically updated based on the status of tasks
2. The Critical Path will be automatically re-calculated every time a task is modified

When you click on the Display Critical Path button on the Activity page within a Project, the Critical Path associated with the Implementation Plan selected on the page gets highlighted on the Gantt Chart with different colour. By default, you will be able to see the Critical Path in Red. If the System Administrator sets a different color then the Critical Path will be displayed with the new color.




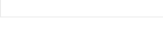

NAME	TYPE	STATUS	2021		
			JAN	FEB	MAR
Cricket Coaching	Training	In Progress			
> Basketball Coaching	Training	Planning			
Coaches Assessment	Planning	Planning			Overdue: 3 days
Skill Building Workshops	Training	In Progress			

Sort the Activity Table

Users can click on any of the columns to sort the list of Activities. By default, the Activity Table is sorted in ascending order for Earliest_Start_Date__c so that Activities with earlier start dates (either planned or actual) are displayed above Activities with later start dates.

Name	2021				
	Jan	Feb	Mar	Apr	May
Cricket Coaching					
Skill Building Workshops					
Basketball Coaching					
Coaches Assessment					

If multiple Activities have the same value in Earliest_Start_Date__c, then those Activities will be sorted in order of alphabetically ascending Name value.

Name	2021			
	Feb	Mar	Apr	May
Cricket Coaching				
Skill Building Workshops				
Basketball Coaching				
Coaches Assessment				

Sorting occurs primarily at the parent Activity level. If a parent Activity has multiple child Activities when the table is sorted, then those child Activities continue to be displayed beneath the parent Activity, ordered beneath that parent according to the sorting criteria.

In the example provided, the parent Activities will be sorted in alphabetical ascending order based on the value in the Location field. If any of those parent Activities have more than one child Activity, those child Activities are listed below the related parent Activity and sorted in alphabetical ascending order. This means that the child Activity with no Location would be displayed directly beneath the parent Activity, as it is alphabetically first.

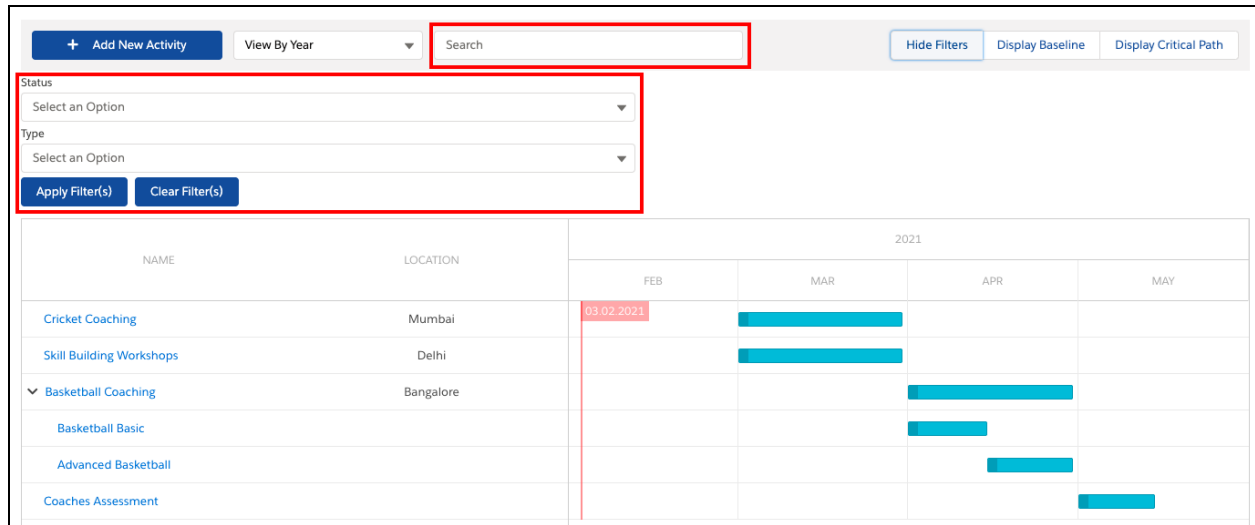
Name	Location	2021		
		Feb	Mar	Apr
▼ Basketball Coaching	Bangalore	04.02.2021		
Advanced Basketball	Chennai			
Basketball Basic	Kolkata			
Skill Building Workshops	Delhi			
Coaches Assessment	Hyderabad			
Cricket Coaching	Mumbai			Overdue: 8 days

Activities with no ('null') values in the sorted field will display towards the top of the table (depending on the level of hierarchy), as they are considered alphabetically/numerically first in the list.

Name	Location	2021		
		Jan	Feb	Mar
Coaches Assessment			04.02.2021	
▼ Basketball Coaching	Bangalore			
Advanced Basketball	Chennai			
Basketball Basic	Kolkata			
Skill Building Workshops	Delhi			
Cricket Coaching	Mumbai			

Filter Activities

You can filter Activities within the Activities table to display specific Activities that you need to view. You can filter Activities either by matching text in the search bar or by field values in the advanced filter section.



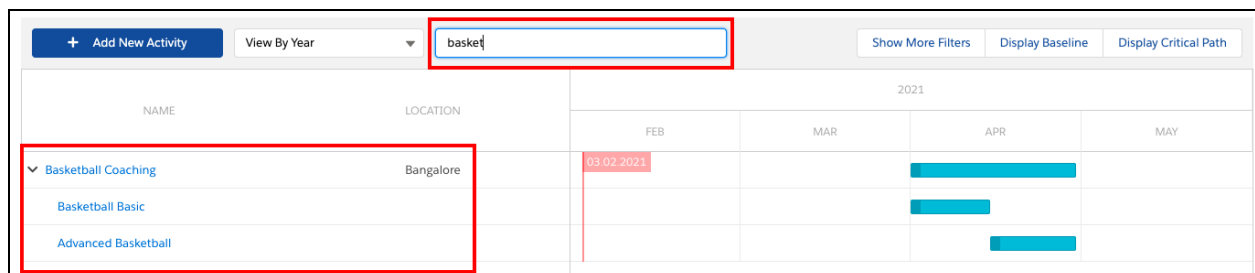
The screenshot shows the Amp Impact interface. At the top, there is a navigation bar with a '+ Add New Activity' button, a 'View By Year' dropdown, a search bar, and buttons for 'Hide Filters', 'Display Baseline', and 'Display Critical Path'. Below the navigation bar, there are filter sections for 'Status' and 'Type', both with 'Select an Option' dropdowns, and 'Apply Filter(s)' and 'Clear Filter(s)' buttons. The main area is a table with columns for 'NAME', 'LOCATION', and a Gantt chart for the year 2021 (FEB, MAR, APR, MAY). The table contains the following activities:

NAME	LOCATION	2021			
		FEB	MAR	APR	MAY
Cricket Coaching	Mumbai	03.02.2021			
Skill Building Workshops	Delhi				
▼ Basketball Coaching	Bangalore				
Basketball Basic					
Advanced Basketball					
Coaches Assessment					

Filter with Matching Text in the Search Bar

You can use the type-ahead search bar to filter Activities. When you type text into the search bar, the Activity Table will automatically re-render to only display Activities with matching text in their field values. The search accommodates symbols as well (example - *, @, #, \$, etc)

1. If no Activities have field values that match the entered text, then an error message will display above the Activity Table, notifying the user that no activities match the criteria.
2. If the filter matches a parent Activity, then only its child Activities that match the criteria are displayed.
3. If the filter matches a child Activity, then the parent Activity is also displayed. Any sibling Activities that do not match the criteria are hidden.
4. To remove this filter, clear out the text entered in the Search Bar and the Activity Table will automatically re-render to display all Activities.



The screenshot shows the Amp Impact interface with the search bar containing the text 'basket'. The table below shows only the activities that match this search criteria:

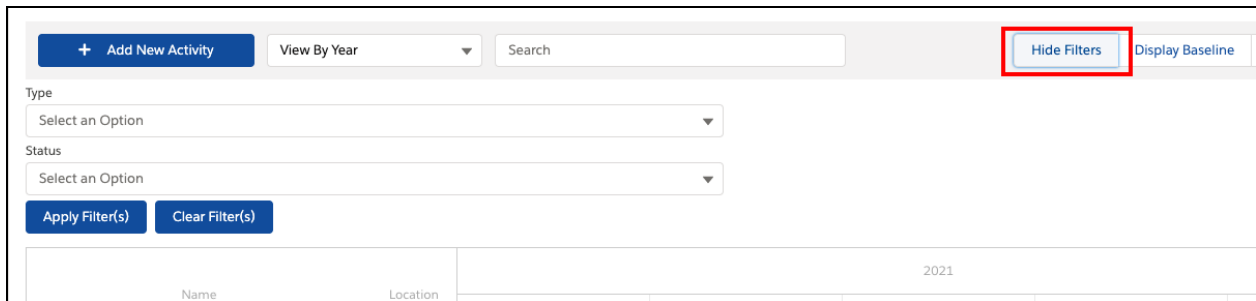
NAME	LOCATION	2021			
		FEB	MAR	APR	MAY
▼ Basketball Coaching	Bangalore	03.02.2021			
Basketball Basic					
Advanced Basketball					

Filter by Field Values

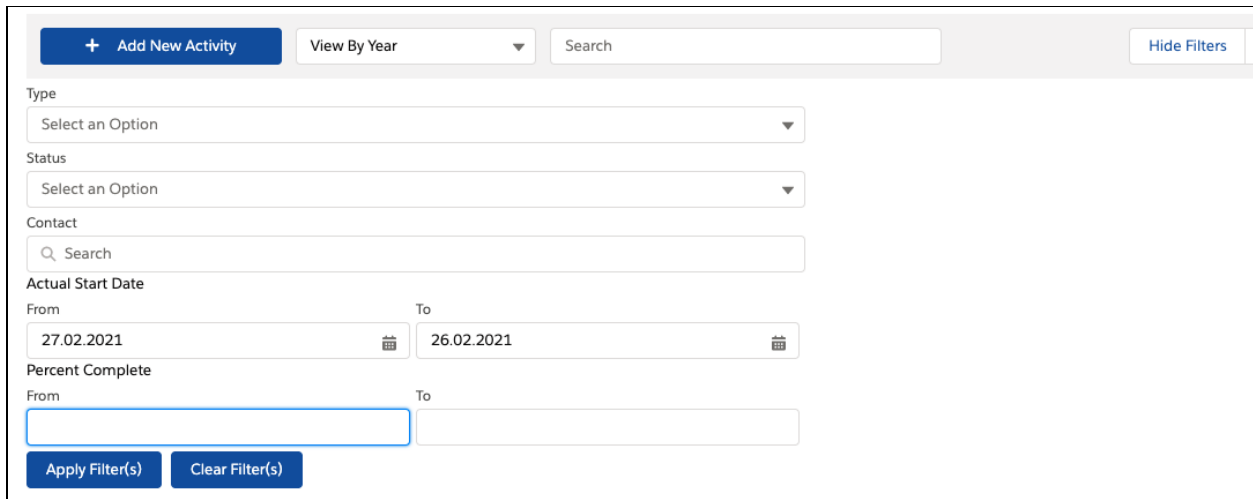
When you click on the Show More Filters button on the Activities tab within a Project, a section expands to showcase the fields that you can use to filter Activities based on the values entered. By default, the Status and Type fields are available out of the box.

👉 You can also add more fields to the filter by adding the fields to the ACTIVITY_TABLE_SEARCH_FILTER fieldset.

1. Once the Advanced Filters panel is expanded, the Show More Filters button turns into the Hide Filters button. The Hide Filters button can be clicked to collapse the Advanced Filters panel.

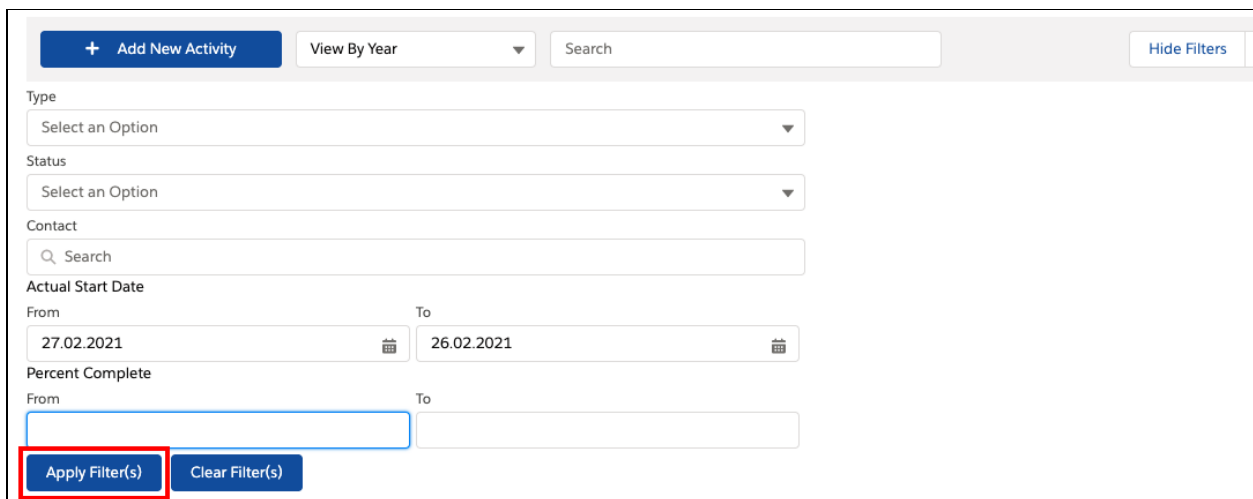


2. The display of the filters depends on the field type:
 - a. Filters on picklist fields are displayed as single-select picklists
 - b. Filters on relationship (master-detail or lookup) fields are displayed as search and select fields
 - c. Filters that depend on ranges (e.g. Percent Complete or Actual Start Date) accept start and end values
 - d. Filters on text (text or long text area) fields are displayed as input text fields



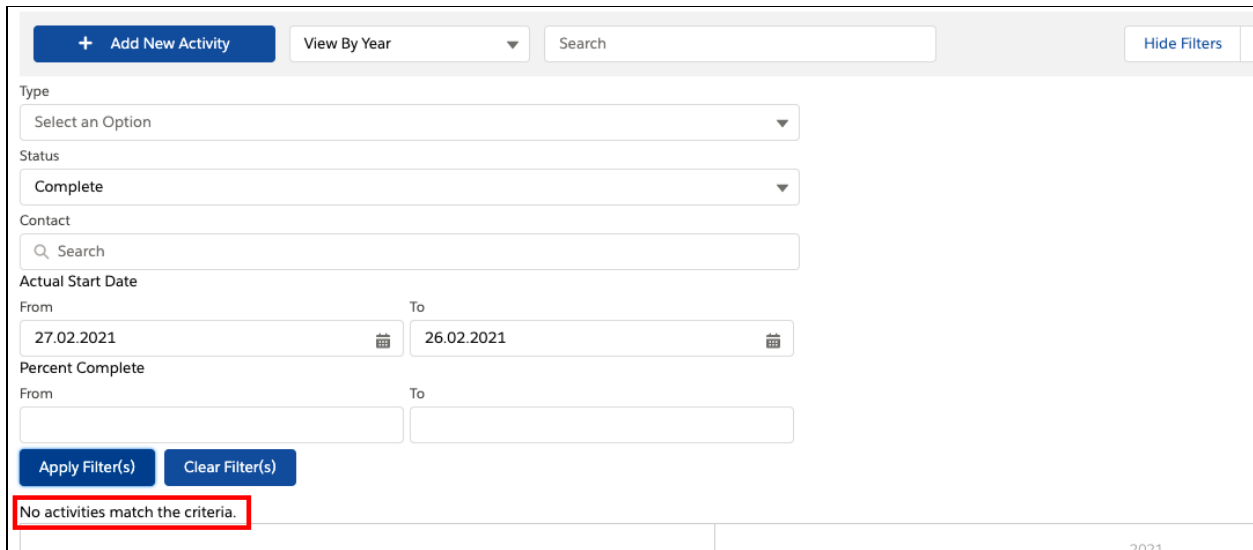
The screenshot shows the 'Advanced Filters' panel. At the top, there is a '+ Add New Activity' button, a 'View By Year' dropdown, a search box, and a 'Hide Filters' button. The filter sections are: 'Type' (dropdown: Select an Option), 'Status' (dropdown: Select an Option), 'Contact' (search box: Q Search), 'Actual Start Date' (From: 27.02.2021, To: 26.02.2021), and 'Percent Complete' (From: empty, To: empty). At the bottom, there are two buttons: 'Apply Filter(s)' and 'Clear Filter(s)'. The 'Apply Filter(s)' button is highlighted with a blue border.

- Once the criteria is set, the User clicks the Apply Filter(s) button, and the Activity Table re-renders to only display Activities that match the criteria.



This screenshot is identical to the previous one, but the 'Apply Filter(s)' button is now highlighted with a red border, indicating it has been clicked.

- If no Activities have field values that match the filter criteria, then an error message will display below the Advanced Filters panel, notifying the user that no activities match the criteria.

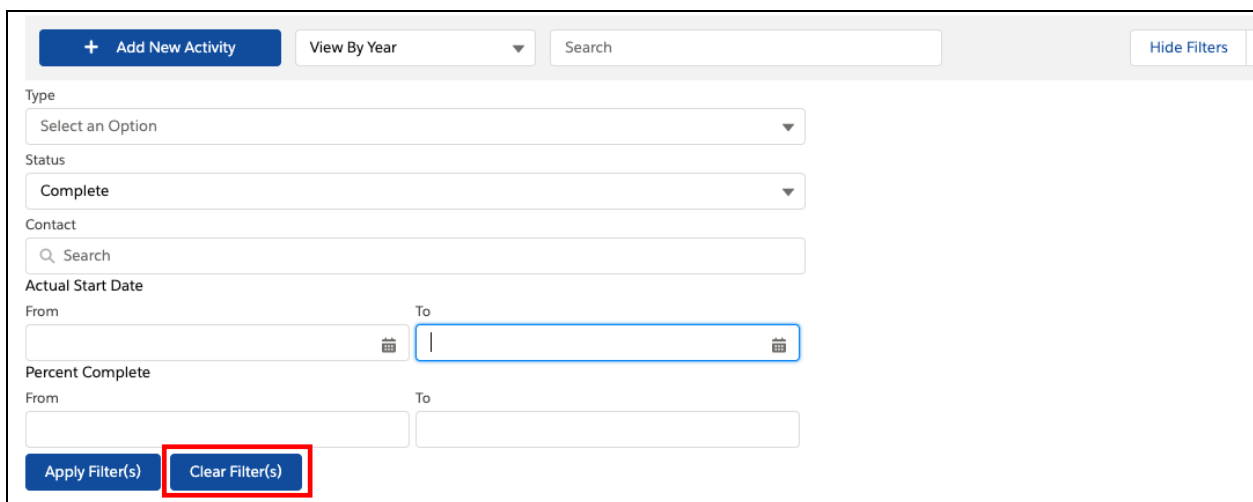


The screenshot shows the filter interface with the following settings:

- Buttons: + Add New Activity, View By Year (dropdown), Search (input), Hide Filters (button)
- Type: Select an Option (dropdown)
- Status: Complete (dropdown)
- Contact: Search (input)
- Actual Start Date: From 27.02.2021 (calendar icon), To 26.02.2021 (calendar icon)
- Percent Complete: From (input), To (input)
- Buttons: Apply Filter(s), Clear Filter(s)

A red box highlights the message: **No activities match the criteria.**

- To remove this filter, the User can then click the Clear Filter(s) button. The criteria in all filters will become blank, and the Activity Table will re-render to display all Activities once more.



The screenshot shows the filter interface with the following settings:

- Buttons: + Add New Activity, View By Year (dropdown), Search (input), Hide Filters (button)
- Type: Select an Option (dropdown)
- Status: Complete (dropdown)
- Contact: Search (input)
- Actual Start Date: From (input), To (input)
- Percent Complete: From (input), To (input)
- Buttons: Apply Filter(s), Clear Filter(s)

A red box highlights the **Clear Filter(s)** button.

- If the filter matches a parent Activity, then only its child Activities that match the criteria are displayed.

<input type="button" value="+ Add New Activity"/> <input type="text" value="View By Year"/> <input type="text" value="Search"/> <input type="button" value="Hide Filters"/> <input type="button" value="Display"/>						
Type <input type="text" value="Select an Option"/>						
Status <input type="text" value="Planning"/>						
<input type="button" value="Apply Filter(s)"/> <input type="button" value="Clear Filter(s)"/>						
Name	Type	Status	2021			
			Jan	Feb	Mar	
Coaches Assessment	Planning	Planning		04-02-2021		
<input checked="" type="checkbox"/> Basketball Coaching	Training	Planning				
<input type="checkbox"/> Basketball Basic	Training	Planning				
<input type="checkbox"/> Advanced Basketball	Training	Planning				

7. If the filter matches a child Activity, then the parent Activity is also displayed. Any sibling Activities that do not match the criteria are hidden.

<input type="button" value="+ Add New Activity"/> <input type="text" value="View By Year"/> <input type="text" value="Search"/> <input type="button" value="Hide Filters"/> <input type="button" value="Display"/>						
Type <input type="text" value="Select an Option"/>						
Status <input type="text" value="Complete"/>						
<input type="button" value="Apply Filter(s)"/> <input type="button" value="Clear Filter(s)"/>						
Name	Type	Status	2021			
			Jan	Feb	Mar	
<input checked="" type="checkbox"/> Basketball Coaching	Training	Planning		04-02-2021		
<input type="checkbox"/> Basketball Basic	Training	Complete				

8. If more than one additional filter is created, when the User clicks the Apply Filters button, the filtering will use "AND" logic to display Activities that match the criteria.

+ Add New Activity View By Year <input type="text" value="Search"/> Hide Filters					
Type <input type="text" value="Planning"/>					
Status <input type="text" value="Planning"/>					
Apply Filter(s)		Clear Filter(s)			
Name	Type	Status	2021		
			Jan	Feb	Mar
Coaches Assessment	Planning	Planning		04-02-2021	

Record Limits

Feature	Record Limit	Processing / Loading Time
Activities (LWC)	<ul style="list-style-type: none"> ● 50 Implementation Plans with 300 Activities each ● 4500 Activities at once. This could be: <ul style="list-style-type: none"> ○ Multiple Implementation Plans with total 4500 Activities displayed simultaneously in the Activities table ○ Single Implementation Plan with total 4500 Activities displayed in the Activities table 	< 1 min