User Guide

Version Name: Electra | Release Date: Winter 2021

Overview

Amp Impact is a flexible portfolio management and impact measurement application built on the Salesforce platform, helping organizations track targets and results against indicators and across geographies and projects.

In this user guide, you will learn how to:

- Define standard and custom indicators for each investee / deal / grant
- Categorize / tag Indicators with thematic areas
- Set reporting periods and choose reporting frequency
- Set targets against indicators for each reporting period
- Add results/actuals for indicators for each reporting period
- Disaggregate indicators in user-defined disaggregation levels (e.g. by age group, type of beneficiary, sex
- Report on results and targets over time and across projects using native Salesforce reporting and dashboarding
- Build and structure logical / strategic frameworks for each project
- Schedule and track disbursements from grants / impact investments for a project
- Manage and assess risks at the program or grant/portfolio level
- Visualize targets and results data in performance graphs

Familiarize yourself with Amp through the Terminology and Navigate Amp Impact sections. To start using and implementing Amp, jump to Set Up Catalog-Level Data.

Dig deeper with feature-specific user guides

📐 Extend the functionality of Manage Indicators with the **Aggregations and Calculations User Guide**

📝 Create, submit, and review Submissions with the **Submissions User Guide**

🔨 Build logical frameworks with the **Manage Frameworks User Guide**

📈 Track progress for activities across Implementation Plans with the **Activities User Guide**

📫 Submit grants in a grantee portal with the **Grantee Reporting User Guide**

Amp Impact Terminology

Amp Impact Label	Possible Label(s)	Description
Activity		A set of actions that are proposed, designed and performed during the implementation of a project/program
Actualized Logframe		A Logical Framework which displays associated Indicators and their baseline data, targets set and results achieved to date
Budget		Track the amount of money available to spend and compare it to the money spent on a project. This is a line-item based table with details for accounting the resources available and spent for the project
Disaggregation Group and Values	Category	Capture detailed data for an indicator by different groupings with associated values For example: Disaggregation group: Age Disaggregation values: Under 5, 6-10, 11+
Disbursement	Payment	Track the amount and status of financial transactions
Financial		Create and schedule disbursements paid out to grantees/programs. Manage project budget(s) based on planned versus actual expenditure line items.
Geographic Area		Geographic level at which targets are set/results are reported within a project and for each project indicator. For example, country or district
Implementation Plan		Within a Project, one or more Implementation Plan(s) may be created to organize the timeline and execution of Activities
Indicator	Metric Key Performance Indicator (KPI)	Catalog of indicators tracked. These may include global and/or customized, project-specific indicators

Logframe Item	Objective	In a Logical Framework, the list of Objectives that are tracked. The Logframe Item uses the Objective object. These can be identified as various levels - impact, outcome, output, activity, or input
Objective	Goal Outcome	Tag / categorize indicators within an impact measurement or logic model framework
Project	Grant Investee Program Investment	Unit/ reporting level for managing indicators, internal and external reporting and program management
Reporting Period		Time period for when targets are set/ results are reported within a project and for each project indicator. For example, quarterly or annual
Result	Actual	The value for a Project Indicator that is collected through a Project/Program and that may be compared against Target values for that particular Project Indicator
Risk		Risk is the likelihood that an event will occur that will cause some type of undesirable effect. These events can occur anywhere, anytime. They may be predictable or not, controllable or not, and caused by internal or external variables (*Source: Open Road Alliance*). A Risk record has details such as probability, potential impact and degree of control over the defined Risk. It also specifies a mitigation strategy for said Risk.
Risk Register		A Risk Register contains a collection of Risks for a Project.
Risk Assessment		A Risk Assessment is conducted to get information about the latest status of a Risk.
Submission	Assessment	An assessment/questionnaire with Sections and Questions that may be scored for evaluation purposes. Alternatively, create a Narrative Report with responses to qualitative Questions

Target	Projection Goal	The anticipated or target value to be achieved for a Project Indicator. This may be compared against the Result to evaluate performance
Template		Templates are the master version of a Submission, from which Submissions can be copied and assigned for completion.
Thematic Area	Focus Area Impact Pillar Theme Sector	Tag/ categorize Projects and/or Indicators by themes, or areas of work focus Examples: Health, Education, Energy

Navigate Amp Impact – from indicator definition to data entry and visualization

This guide provides information about the following features and uses of Amp Impact:

Manage Framework
Create and structure a project's impact / logic model framework.

Risk
Assess the severity, status, and probability of each risk associated with a project. View visualizations and report graphs of risks by type, status, and risks occurred by project.

Manage Indicators
Select from a list of catalog indicators to report on. Alternatively, create custom indicators to report on.

Set Targets
Enter and track targets for individual project indicators, filtered by reporting period and geographic area.

Add Results
Enter and track results for individual project indicators, filtered by reporting period and geographic area.

Performance Graphs
View bar charts per individual project indicator comparing target vs results values across all reporting periods.

Financials
Manage project budget(s) based on planned versus actual expenditure line items.
Create and schedule disbursements paid out to grantees/programs.

Project Roles

Assign and manage a contact's involvement and specific role within a Project

For the following features, refer to their individual feature-specific User Guides:

- Activities
- Aggregated Indicators
- Calculated Indicators
- Grantee Reporting
- IATI
- Submissions

Set Up Catalog-Level Data

In order to start using Amp Impact, you will first need to create records for a group of Objects through the native interface (or Dataloader).

Amp Impact supports multi-language capability. This is true when a Project has standard information, such as indicators, reporting periods, and geographic areas with users who use multiple languages. For example, users can view a Project record detail in English, Spanish, and French at the same time.
This feature supports *only* viewing and exporting data entered by users in multiple languages. Please note that this feature *does not* include translation of standard or custom fields in Amp Impact. Amp will not translate data entered by users from one language to another. To learn more about translations, please refer to [Salesforce Translation Workbench] to translate field labels.

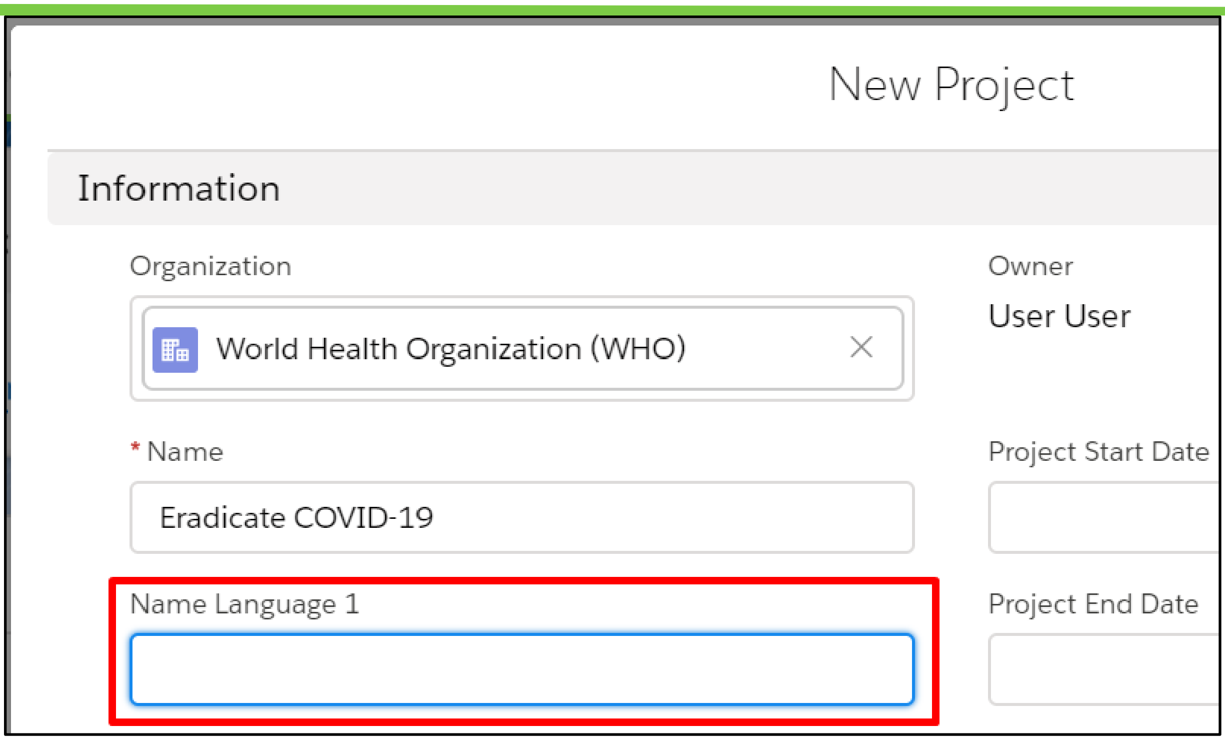
> ⓘ **Admin Note:**
> Submissions are excluded from the multi-language feature. Templates translated across different languages can be manually created to support multi-language functionality.

To enable multi-language capability in Amp Impact, ensure that the System Admin has configured the Custom Label USER_LANGUAGE_CODE to reflect which of the three available languages (in addition to the default language, English) is in use for a specific user. Please refer to the *Amp Impact Multi Language Capability Setup Guide* for more information.

To begin setting up a Project, first create a Project__c record.

Create a Project

1. Open the Projects tab and click New.
2. Enter the Project's name.
3. Enter the translated value(s) for the Project name in the appropriate field.
4. Ensure that the translated value corresponds to the Language code defined by the System Admin. For example, if the System Admin has set up the Custom Label USER_LANGUAGE_CODE such that Language 1 is 'Spanish', enter the Project in Spanish for the field ampi__Name_Language_1__c. See screenshot below.



5. If up to three supported languages are enabled and set up by the System Admin, populate the following fields in the languages defined as Language 1, Language 2, and Language 3:
    a. ampi__Name_Language_1__c
    b. ampi__Name_Language_2__c
    c. ampi__Name_Language_3__c
6. Amp Impact comes with some fields to enter project relevant data: description, country, start date, end date. Enter data for any relevant fields.
7. Click *Save*.

Create records for the following catalog objects. See detailed instructions below.

- Reporting Periods
- Geographic Areas
- Disaggregation Groups (with Disaggregation Values)
- Thematic Areas
- Project Geographic Areas
- Project Thematic Areas

Create Reporting Periods

Once you have a Project, create Reporting Periods for that project. A Reporting Period is a section of time that you will set targets and results for this project.
The Set Targets and Add Results pages will not work if you do not create at least one Reporting Period.

1. To create reporting periods, click the *New Reporting Period* button from the related list on your Project.

2. Enter a Name for the reporting period.
3. 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. Enter the translated value(s) for the Reporting Period label in the appropriate field.
5. Ensure that the translated value corresponds to the Language code defined by the System Admin. For example, if the System Admin has set up the Custom Label USER_LANGUAGE_CODE such that Language 1 is 'Spanish', enter the Reporting Period in Spanish for ampi__Name_Language_1__c.
6. If up to three supported languages are enabled and set up by the System Admin, populate the following fields in the languages defined as Language 1, Language 2, and Language 3:
    a. ampi__Label_Language_1__c
    b. ampi__Label_Language_2__c
    c. ampi__Label_Language_3__c
7. Select the Report Type. This controls which indicators will be reported on in this reporting period.
8. If my report type is quarterly, then all indicators with a quarterly reporting frequency will display for this reporting period.
9. Enter the start and end dates for the reporting period.
10. You can leave all these other fields blank for now. Click *Save and New* to create other Reporting Periods for this project, or *Save* to finish creating reporting periods.

Create Geographic Areas

Geographic Areas are the areas that the organization operates in and wants to report targets and results for.

1. To create a GA, navigate to the Geographic Area tab and click New.
2. Enter the name of the Geographic Area.
3. Enter the translated value(s) for the Geographic Area name in the appropriate field.
    a. Ensure that the translated value corresponds to the Language code defined by the System Admin. For example, if the System Admin has set up the Custom Label USER_LANGUAGE_CODE such that Language 1 is 'Spanish', enter the Geographic Area in Spanish for ampi__Name_Language_1__c.
4. If up to three supported languages are enabled and set up by the System Admin, populate the following fields in the languages defined as Language 1, Language 2, and Language 3:
    a. ampi__Name_Language_1__c
    b. ampi__Name_Language_2__c
    c. ampi__Name_Language_3__c
5. If there is a Parent GA, look up and select its name in the Parent Geographic Area field.
6. For example, if I'm entering Maharashtra, which is a state in India, I want to indicate that Maharashtra's Parent Geographic Area is India.
7. Note that this means you should create your highest-level Geographic Areas first, then move down to lower levels.
8. Select the Type for the Geographic Area and click Save.

Create Disaggregation Groups (with Disaggregation Values)

Organizations may choose to disaggregate their indicators using disaggregation groups. A Disaggregation Group is a way for an organization to break down targets and results by indicator into different categories.

For example, you can create a Disaggregation Group called Age Group and then break down targets and results for specified indicators into different age brackets. Disaggregation Group records serve as an umbrella, parent record to a group of Disaggregation Values. In the “Age” Disaggregation Group example, *Age* would be the parent to Disaggregation Value records 0-*25*, *26-50*, and *51+*.

To create a Disaggregation Group, go to the Disaggregation Groups tab and click New.

1. Enter the Name of the Disaggregation Group.

> ⓘ **Admin Note:**
> Values for the Name fields cannot include semicolons (;) to preserve the functionality of search filters for the ampi__Disaggregation_Group__c field.

2. Enter the translated value(s) for the Disaggregation Group name in the appropriate field.
    a. Ensure that the translated value corresponds to the Language code defined by the System Admin. For example, if the System Admin has set up the Custom Label USER_LANGUAGE_CODE such that Language 1 is ‘Spanish’, enter the Disaggregation Group in Spanish for ampi__Name_Language_1__c.
3. If up to three supported languages are enabled and set up by the System Admin, populate the following fields in the languages defined as Language 1, Language 2, and Language 3:
    a. ampi__Name_Language_1__c
    b. ampi__Name_Language_2__c
    c. ampi__Name_Language_3__c
4. Click Save.
5. Next, you need to enter the Disaggregation Values. To create them, click New Disaggregation Value in the related list on the Disaggregation Group.
6. Enter the name of the Disaggregation Value, and which order it should display on the data entry pages (Set Targets and Add Results).

8. For example, if a user is creating disaggregation values for the *Age* disaggregation group:

Disaggregation Value	***Order***
Under 5 years old	1
6-15 years	2
16+ years	3

    a. Ensure that the translated value corresponds to the Language code defined by the System Admin.
9. If up to three supported languages are enabled and set up by the System Admin, populate the following fields in the languages defined as Language 1, Language 2, and Language 3:
    a. ampi__Name_Language_1__c
    b. ampi__Name_Language_2__c
    c. ampi__Name_Language_3__c

ⓘ **Admin Note:**
When creating a new Disaggregation Group for an aggregated Project Indicator (where Type_of_Results__c = Aggregated), always create one Other / Unknown Disaggregation Value to account for records that may be missing that data. While mapping the possible field values to the custom Disaggregation Values, leave the mapping for only this Other/Unknown field blank. Any additional blank mapping will cause the Project Indicator to aggregate incorrectly.

10. Finally, click Save and New to create additional Disaggregation Values. You may add any number of Disaggregation Values as children to a single Disaggregation Group.

Disaggregation Assignment
- Any number of Disaggregation Groups may be created and used within a single Project.
- Note that an Indicator or Project Indicator can be disaggregated by one custom Disaggregation Group only.
- This allows an Indicator or Project Indicator to be disaggregated by 2 groups: (a) Cross-disaggregation by Sex (horizontal data entry) + 1 custom disaggregation group (vertical data entry).
- Sex disaggregation is available out of the box with Amp Impact. Custom disaggregation groups enable flexibility to be defined by the user.
- If multi-language functionality is set up, the translated value for the Disaggregation Group lookup dynamically displays the translated Name (ampi__Name_Translated__c) according to the User's language setting.
- Disaggregation by Sex is captured outside of the Disaggregation Group setup.

Create Thematic Areas – *Optional*

1. To create a Thematic Area, navigate to the Thematic Areas tab and click *New*.

2. Enter the Name of the Thematic Area.

ⓘ **Admin Note:**
Values for the Name field cannot include semicolons (;) to preserve the functionality of search filters for the ampi__Thematic_Area__c field.

3. If you'd like to capture a lengthy description about the thematic area in addition to the name, enter it in the description field.
4. Enter the translated value(s) for the Thematic Area Name in the appropriate field
    a. Ensure that the translated value corresponds to the Language code defined by the System Admin. For example, if the System Admin has set up the Custom Label USER_LANGUAGE_CODE such that Language 1 is 'Spanish', enter the Thematic Area in Spanish for ampi__Name_Language_1__c.
5. If up to three supported languages are enabled and set up by the System Admin, populate the following fields in the languages defined as Language 1, Language 2, and Language 3.
    a. ampi__Name_Language_1__c
    b. ampi__Name_Language_2__c
    c. ampi__Name_Language_3__c
6. If this Thematic Area is related to another Thematic Area, you can link them in the Parent Theme field, then click *Save*.
7. *Optional* - to assign an icon to the Thematic Area, once you created and saved the Thematic Area record, click the *Open Icons Catalog* button on the record. A pop-up/tab will open displaying the catalog of icons and their respective codes. Click on an icon to copy the code, and then paste that value into the ampi__Icon__c field.

Set Up Project-Specific Data

Records created at the Catalog-level can be added to Projects and be further customized to be Project-specific.

Create Project Geographic Areas

Organizations can select GAs related to their Project by creating Project Geographic Areas (PGA). This is helpful for organizations working on a variety of projects in different regions.

Linking a Geographic Area to a Project means that only the relevant Geographic Areas show up for that Project's Indicators.

A Project Geographic Area is a junction between a Project and a Geographic Area. The Set Targets and Add Results pages will not work if you do not create at least one PGA.

1. To create a PGA, click New Project Geographic Area from the related list on the Project.

2. If multi-language functionality is set up, the translated value for the Geographic Area lookup dynamically displays the translated Name (ampi__Name_Translated__c) according to the User's language setting.
3. Specify which Geographic Area you want to link to this project, then click *Save And New* to link another, or just Save to finish creating PGAs.

Create Project Thematic Areas – *Optional*

Some organizations tag / categorize Projects with Thematic Areas (or other terminology such as Investment Theme, Impact Pillar, etc.).

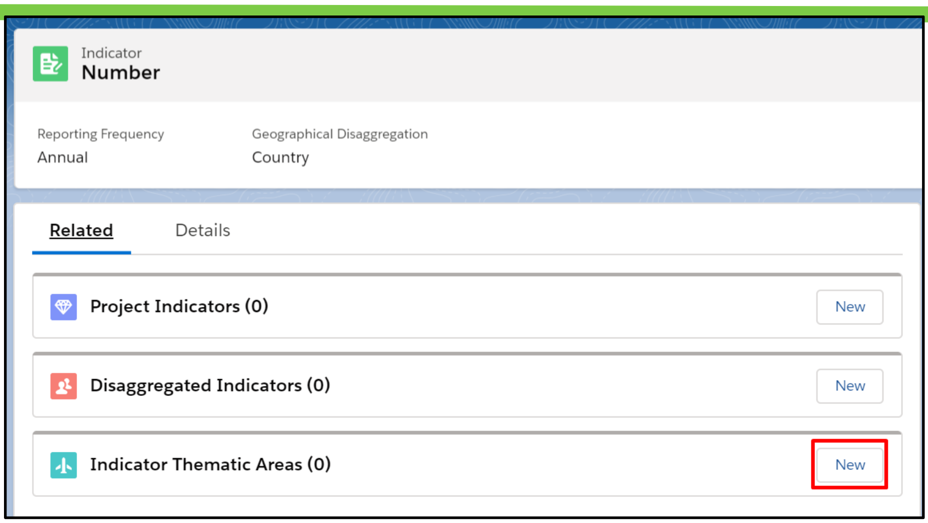
1. To create a Project Thematic Area, click the *New Project Thematic Area* button in the related list on the Project.
2. Select the Thematic Area associated with the Project
3. According to the User's language setting, if multi-language functionality is set up, the translated value for the Thematic Area lookup dynamically displays the translated Description (ampi__Description_Translated__c).
4. Click *Save and New* or *Save*.

Adding Required Indicators for a Thematic Area to a Project – *Optional*

Organizations that tag or categorize Projects with Thematic Areas may require certain Indicators to be added to a Project, therefore creating Project Indicators based on its Project Thematic Area(s). By doing this, they are able to standardize which indicators are reported for a Thematic Area and may be relevant across multiple Projects.

Amp Impact facilitates this process for users as follows:

1. Ensure Thematic Area(s) have been set up - see steps above.
2. Navigate to the Indicator object and click *New.*
3. Any indicators created here will display in the Indicators Catalog on the ManageIndicators page of a project record.
4. To learn about creating project indicators from the Indicators Catalog, see steps here.
5. Click into the *Related List* tab.
6. On the Indicator Thematic Area list, click *New.* See screenshot below.



7. On creation of a new Indicator Thematic Area record, mark the Required field as TRUE.

> ⓘ **Admin Note:**
> The checkbox field ampi__Required__c must be added to the Indicator Thematic Area Page Layout. Speak to a System Admin about configuration.

8. Click *Save*.
9. Navigate to the relevant Project record.
10. Click on the *Setup* tab and scroll to *Thematic Areas*.
11. Assign Thematic Area(s) to the Project by referring to the steps above to create a Project Thematic Area.
12. Project Indicator records will be automatically created for Indicators where the assigned Thematic Area was marked as *Required*.
13. These Project Indicators will display on the Selected Indicators tab. To learn more about the ManageIndicators page, please review the Manage Indicators section.
14. If a Project Thematic Area is already added to a Project, and a new Indicator is created which has an Indicator Thematic Area related to existing Project Thematic Area and is marked as *Required*, then the new Indicator will be added to the project as a Project Indicator.
15. Existing Project Indicators with parent Indicators that have Indicator Thematic Area records are not removed from Projects when the field ampi__Required__c on Indicator Thematic Area is edited from TRUE to FALSE.

> ⓘ **Admin Note:**
> By default, when a Project Thematic Area is deleted, related Project Indicators where the assigned Thematic Area was marked as Required are not deleted. This automatic deletion can be enabled through Dynamic Loader Custom Settings, wherein the related Project Indicators are also deleted. Speak to a System Admin and refer to the Installation Guide.

Create Organization Roles - *Optional*

Organization Role object enables tracking the role an organization played in a particular Amp Impact project. For example, an organization's role is to be a donor if it provides funding to a project. Four fields on Organization Role object are used for this purpose:

1. Organization Role Name - Text field tracking the name provided to the organization's role
2. Role - Picklist field tracking the role that an organization played in an activity
3. Project - Master-detail field to the project which is receiving the funds
4. Organization - Master-detail field to the organization which is providing/receiving the funds

Manage Framework

Overview: The Manage Framework Visualforce page allows users to build and manage the logical framework for a project by setting Objectives in hierarchical order and displaying their related indicators for a high-level overview of the project's progress.

To set up and use this feature: refer to the 'Customize Field Sets' section of the *Installation* Guide

Logframes Explained

Definition: A logframe is a means to organize the planning, implementation, management, monitoring, and evaluation of projects. It serves as a structure that outlines and links together key points/goals of a project in a logical way (UNODC).

Throughout the duration of a project, logframes can be referred to in order to ensure that the goals, objectives of a project are being met by tracking indicators associated with those objectives.

How do you write a Logframe in Amp Impact?

Different institutions have different methods and terminology for outlining logframes. In Amp Impact, the *Objective* object is used for the Logframe Item column. Objectives and sub-objectives can be created by the user and a *Level* can be associated with each Objective, to create a hierarchy and structure for the Logical Framework.

> ⓘ **Admin Note:**
> The Level field of a logframe in Amp Impact does not prescribe an order. The purpose of this framework is to serve as a logical structure to the project. For that reason, a project may not have one outcome, output, activity, and input per impact objective. You can customize the terminology and usage of Levels, to meet organizational needs.

Impact: Outlining the impact of a project is the broadest goal in a logframe.
Example: "A decrease in the number of new cases of malaria."

↳ **Outcome:** Outcomes in a logframe are the second broadest levels. This objective often answers questions such as: What will be achieved? Who will benefit? By when will this be achieved?
Example: "New and improved methods of preventing mosquitoes from entering homes implemented by homeowners within 6 months."

↳ **Output:** An output is a level in the framework that defines specific results or deliverables that the project will produce.
Example: "2000 families are reached through the efforts of this project and at least 60% of those reached implement malaria-preventing practices, such as putting up mosquito nets at night."

↳ **Activity**: An activity defines a task(s), event(s), or occurrence(s) to be completed during the project.

Example: “100 training sessions must be conducted, covering the perils of malaria, the importance of preventing the disease, and a demonstration on how to use a mosquito net.”

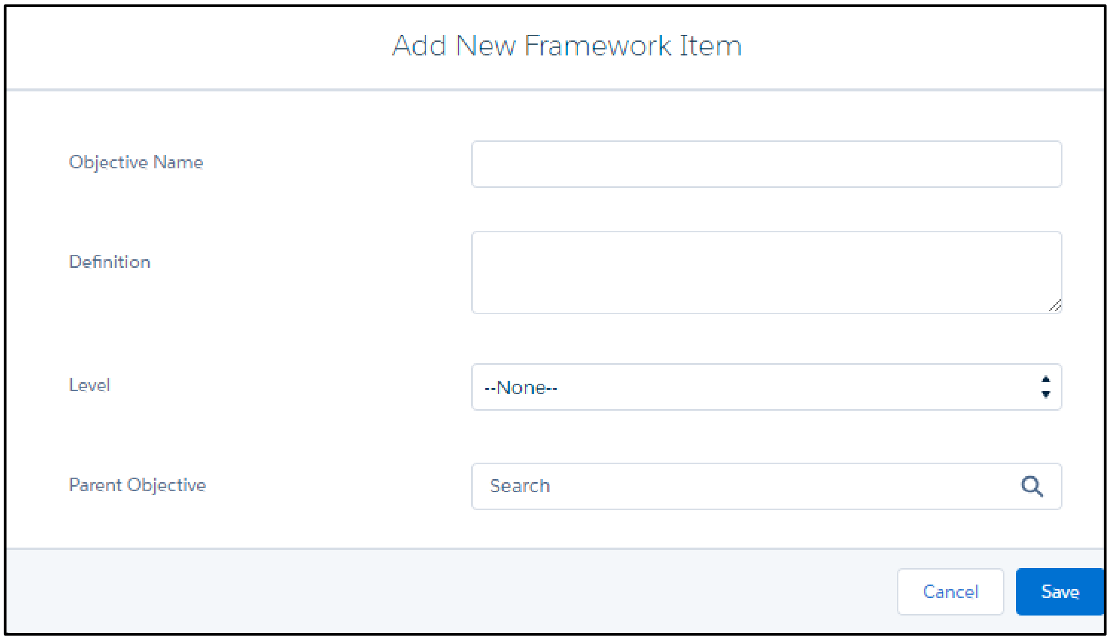
↳ **Input:** The input level of a logframe defines resources used during the project. This can include, but is not limited to, human resources, money, materials, equipment, time, etc.
Example: “Hire 10 health professionals to educate and speak on malaria prevention during each session conducted.”

Create and Manage Objectives for a Project

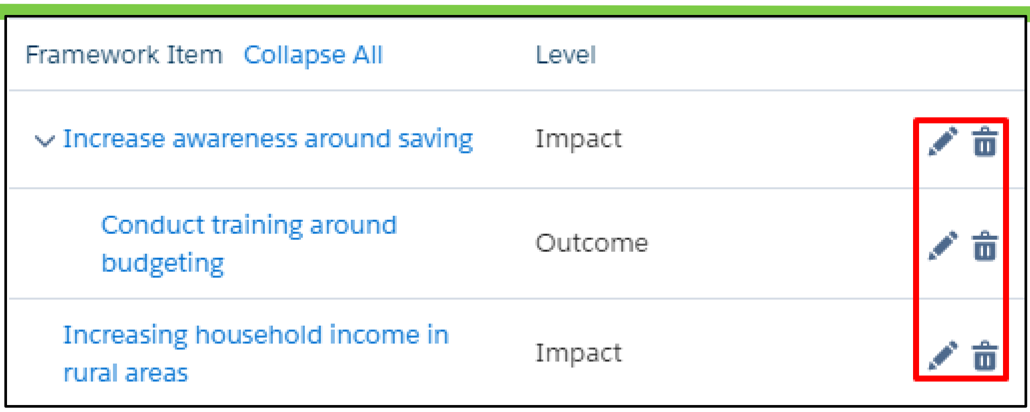
1. From the ManageFramework page, a user can create new objectives and add them to a project by clicking the “Add New Framework Item” button on the top right of the Framework page.
2. A pop-up will appear with Objective fields for the user to fill out.

ⓘ **Admin Note:**
Values for the Description fields cannot include semicolons (;) to preserve the functionality of search filters for the ampi__Objective__c field.

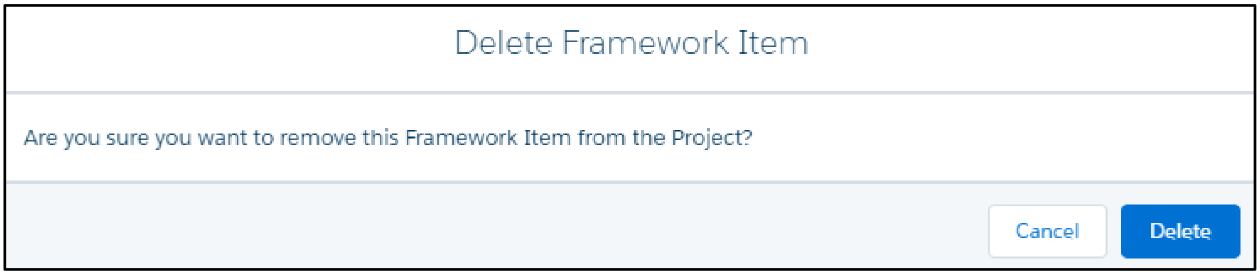
3. When a user clicks “Save” on the pop-up, an Objective record and a Project Objective junction record are created.
4. Note that a Project Objective cannot be its own Parent Project Objective, as this violates hierarchy rules. The Lookup field allows associate users to associate a Project Objective with another that does not directly or indirectly refer to itself.



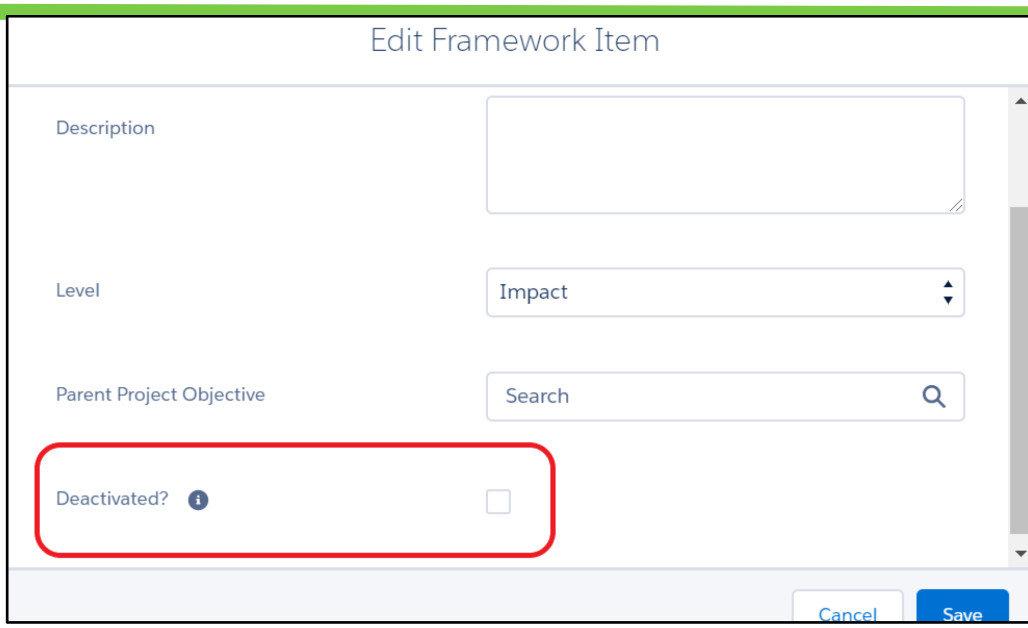
5. After a logframe item has been created, users can edit or delete the item by clicking on the pencil icon or garbage icon respectively.



6. Deleting a project objective removes the record from the logical framework. If the deleted item had any relationships (for example, to an Activity and/or Project Indicator), which are displayed on other pages, those will also be deleted.



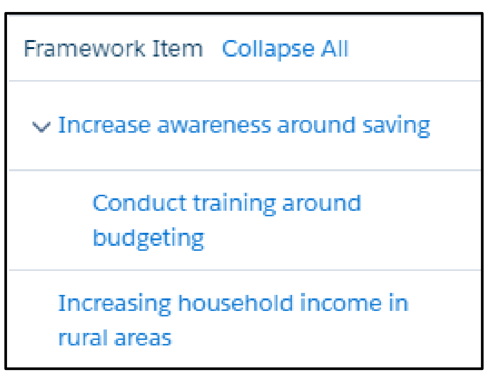
7. Clicking on the *Pencil* icon prompts the edit framework item popup to display. On this interface, users can:
    a. Add/modify/remove information about the logframe item
    b. Deactivate the item. Choosing this action allows the user to remove the project objective from the logical framework without deleting the record. A logframe item can be deactivated by checking the field ampi__Deactivate__c.



8. Objectives can look up to other Objectives, which creates a hierarchy represented with nesting, i.e. a parent Objective will be left-justified, and its immediate child Objectives will be indented once from the left.

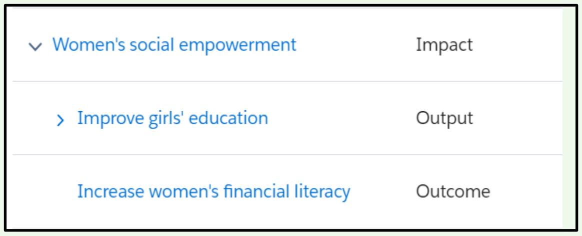
Increase post-educational outcomes	Amount invested into education equality initiatives	Currency	India, Pakistan
	Enrolment rate at university level	Percent	Maharashtra
Decrease adult unemployment rate			
Increase enrolment rate in four-year universities	Enrolment rate at university level	Percent	Maharashtra

9. Objectives are ordered alphabetically at their hierarchical level, i.e. all parent Objectives are alphabetized, and their immediate child Objectives are alphabetized only within the parent Objective.

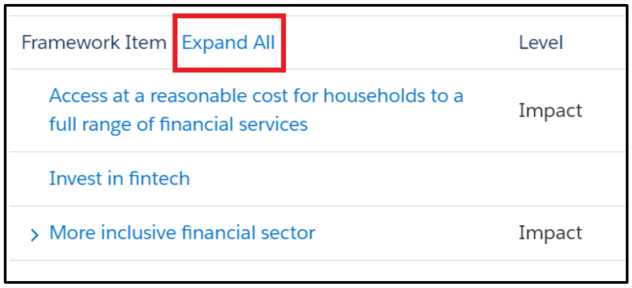


10. A chevron displays to the left of any Objective with at least one child Objective. On click of the chevron, users can toggle the display of an Objective's child Objectives by either collapsing or expanding those nodes.

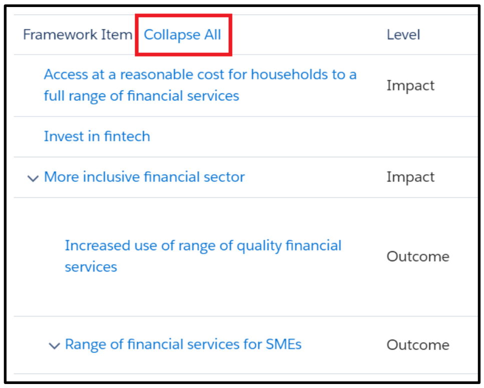
11. If any of those child Objectives also have grandchild Objectives that are collapsed or expanded, those states are preserved on collapse and re-expansion of the grandparent Objective.

Expanded Objectives	***Collapsed Objectives***
	

12. At the top of the table next to the *Framework Item* column header, there is an action link which reads as either “Expand All” or “Collapse All”. A user can click “Expand All” to view all Objectives, including their child Objectives and grandchild Objectives, in the table.



13. A user can click “Collapse All” to hide all Objectives in the table except for the ones that do not have a parent Objective (that is, the highest level of Objectives).

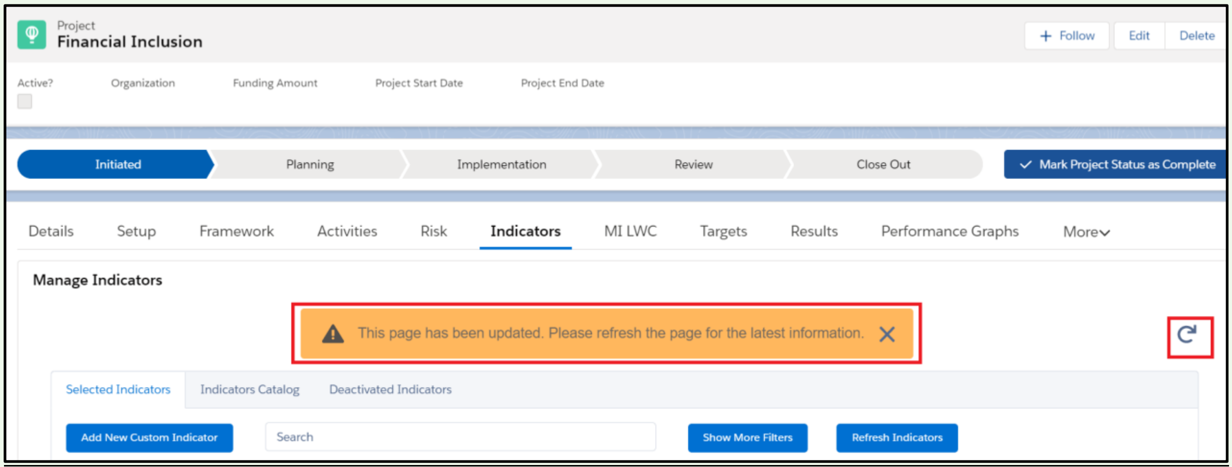


ⓘ **Admin Note:**
If edits are made to this page, for example, anytime a logframe item is added, deleted, or edited via the ManageFramework page, the visualforce pages listed below will display a Refresh icon and an orange warning sign alerting the user that the data on that page is not updated with the most accurate data.

Clicking on the Refresh icon on the visualforce page will refresh that page to update and account for any changes made on ManageFramework. Refer to the screenshot below.

If two users are accessing the same page, only the pages impacted by the changes will receive the warning sign and refresh icon - ie., if user A and user B are both on ManageLogframes, and user B makes an edit to this page, both users will see the warning sign and refresh icon only on Activity, ManageIndicators, SetTargets, and AddResults.

Impacted VisualForce pages and Aura components: Activity, ManageIndicators, SetTargets, AddResults



Add Project Indicators to ManageFramework Table

See the next section - Manage Indicators - for instructions on how to add Indicators to a Project and then associate with one or more Objectives. Make sure that the Objectives field is added to the (i) *Add New Project Indicator* pop-up through the ADD_NEW_INDICATOR_POPUP field set on Indicator object and (ii) the *Edit Project Indicator* pop-up through the EDIT_PROJECT_INDICATOR_POPUP field set on Project Indicator object. This will allow users to tag Project Indicators with the relevant objective(s).

When a logframe item is deactivated (see above for more instructions on deactivating logframe items), it will no longer appear as an available project objective to associate with Project Indicators in the Add New Indicator Popup and Edit Project Indicator Popup.

If the objective was already associated with a Project Indicator, it will display in the Selected Indicators table.

Once a Project Indicator is associated with an Objective, that Project Indicator will appear next to the related Objective in the Framework Table. A Project Indicator can be related to multiple Objectives and will appear adjacent to all related Objectives.

Women's community empowerment	Impact	PO-0133	
Women's financial empowerment	Impact	PO-0121	# of money management workshops
Women's political empowerment	Impact	PO-0116	% of women at local political events (rallies, town halls, etc) % of women voters
Easier access to polling stations for women	Outcome	PO-0120	% of women voters
More women voters	Output	PO-0118	% of women voters

Likewise, multiple Project Indicators can be associated with a single Objective, and all Indicators will appear adjacent to that related Objective.

Women's political empowerment	Impact	PO-0116	% of women at local political events (rallies, town halls, etc) % of women voters

Add Project Indicator-related Data to ManageFramework

Once a Project Indicator is associated with an Objective and displayed in the Framework table, the user can display additional information related to the Project Indicator. To add/remove fields from the Project Indicator object, refer to the '*Customize Field Sets'* section of the Installation Guide.

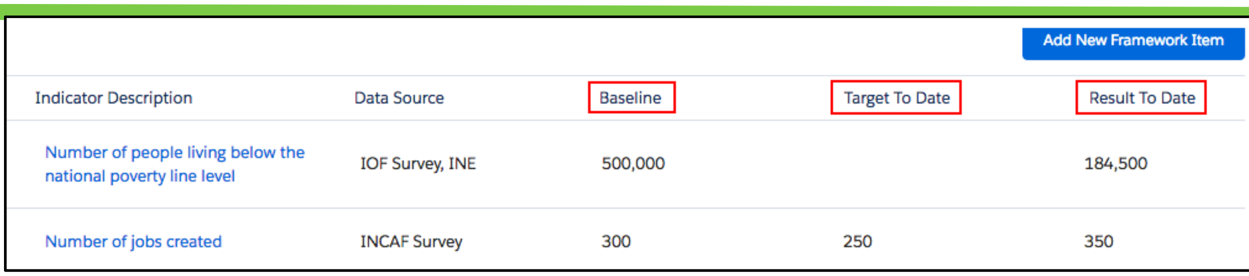
Some fields to add/remove include:

- Baseline: Actual results that were in place at the time a project started. This data is used as a comparative point when collecting results.
  How to populate this field: This number field is populated in the Edit Project Indicator pop-up on the ManageIndicators page. Ensure the field has been added to the field set if it doesn't display in the pop-up initially. This is relevant only for currency, number, and percent indicators. This field sits on the project indicator object to allow users to enter baseline information for the indicator depending on the project.

- Life of Project Target: The target to be met by the end of the project.
  How to populate this field: This number field is populated in the Edit Project Indicator pop-up on the ManageIndicators page. Ensure the field has been added to the field set if it doesn't display in the pop-up initially. This is relevant only for currency, number, and percent indicators.

- Target to Date: Result records pulled from the SetTargets page. This field is on the project indicator object to allow users to enter a target for the indicator depending on the project.

- Result to Date: Result records pulled from the AddResults page.



To populate the Target to Date and Result to Date fields, the user has to first indicate if the Project Indicator's data is collected in a cumulative or non-cumulative manner.

Tracking Data for Cumulative vs. Non-Cumulative Project Indicators

The checkbox field Cumulative__c determines how a user chooses to track the target and result values for a particular Project Indicator.

If a Project Indicator's data is *cumulative* (ie. if the field Cumulative__c = TRUE), data entered in the last reporting period includes data from previous reporting periods.

For example, 'Total number of students enrolling in school' is tracked in a *cumulative* manner every month. The user is targeting 200 students by the end of month 2 and the results tracked indicate that 125 students were enrolled by the end of month 2.

Below is an example of how the user would input the targets and results in a cumulative manner:

Total number of students enrolling in school	**Targets**	**Results**
Month 1	100	100
Month 2	200 (100 from month 1 + 100 from month 2)	125 (100 from month 1 + 25 from month 2)
Target to Date	200	
Result to Date		125

If a Project Indicator's data is *non-cumulative* (ie., Cumulative__c = FALSE), data entered in the last reporting period does not include any data from previous reporting periods.

For the same example as above, the user is tracking 'Total number of students enrolling in school' non-cumulatively.

Below is an example of how the user would input the targets and results in a non-cumulative manner:

Total number of students enrolling in school	**Targets**	**Results**

Month 1	100	100
Month 2	100 (100 students enrolled in month 2)	25 (25 enrolled in month 2)
Target to Date	200	
Result to Date		125

Adding the ‘Result to date,’ and ‘Target to date’ fields to the ManageFramework page allows users to view and report on the progress made on the project indicators within the logframe.

The following table outlines segments quantitative project indicators by their various characteristics to display where a ‘Result to Date’ and ‘Target to Date’ is mathematically possible and accurate:

Data Type	**Cumulative?**	**Disaggregation Level(s)**	**Result records fields used in Calculation**		**Across which Reporting Period(s)**
			Target to Date	Result to Date	
Number	Yes	None	Total Target Value	Total Result Value	Only most recent
		Cross-Disaggregated by Sex	Total Target Value	Total Result Value	Only most recent
		Disaggregation Group	Sum of Total Target Value	Sum of Total Result Value	Only most recent
		Disaggregated by Sex & Group	Sum of Total Target Value	Sum of Total Result Value	Only most recent
	No	None	Sum of Total Target Value	Sum of Total Result Value	All
		Cross-Disaggregated by Sex	Sum of Total Target Value	Sum of Total Result Value	All
		Disaggregation Group	Sum of Total Target Value	Sum of Total Result Value	All
		Disaggregated by Sex & Group	Sum of Total Target Value	Sum of Total Result Value	All
Currency	Yes	None	Total Target Value	Total Result Value	Only most recent
		Cross-Disaggregated by Sex	Total Target Value	Total Result Value	Only most recent

		Disaggregation Group	Sum of Total Target Value	Sum of Total Result Value	Only most recent
		Disaggregated by Sex & Group	Sum of Total Target Value	Sum of Total Result Value	Only most recent
	No	None	Sum of Total Target Value	Sum of Total Result Value	All
		Cross-Disaggregated by Sex	Sum of Total Target Value	Sum of Total Result Value	All
		Disaggregation Group	Sum of Total Target Value	Sum of Total Result Value	All
		Disaggregated by Sex & Group	Sum of Total Target Value	Sum of Total Result Value	All
Percent*	Yes	None	Total Target Value	Total Result Value	Only most recent
		Cross-Disaggregated by Sex	Total Target Value	Total Result Value	Only most recent
	No	None	Total Target Value	Total Result Value	Only most recent
		Cross-Disaggregated by Sex	Total Target Value	Total Result Value	Only most recent
* Target to Date and Result to Date will only be automatically populated for a *Percent* Project Indicator if the Project Indicator is associated with only one Geographic Area and if the Project Indicator does not have a Disaggregation Group. If there is either a Disaggregation Group or more than one Geographic Area, these two fields will remain empty on the Project Indicator record, unless they are manually populated.					

Risk Management

Overview: The Risk Management functionality in Amp Impact has two key components:

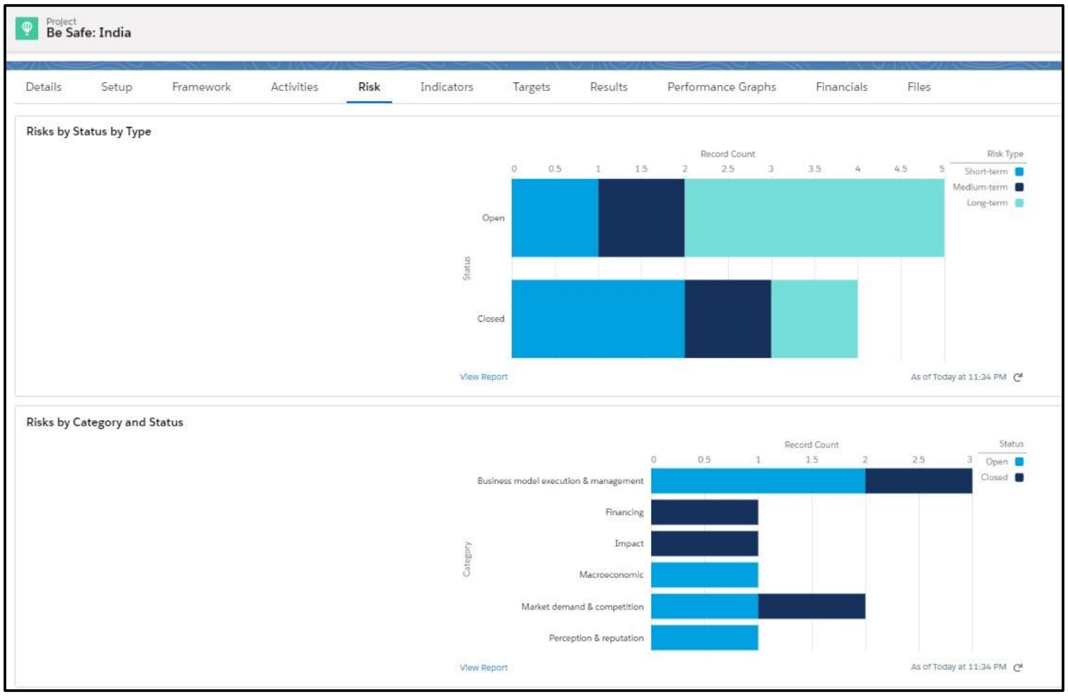
1. It is related to assessing and managing risks at the program or grant/portfolio level for international NGOs or Funders respectively;
2. It is related to implementation and execution-focused risks; that is, risks that may impede achieving impact in a given program, grant or portfolio

This consists of Identifying and Defining Risks, creating Mitigation Strategies for those risks, collecting risks in Risk Registers based on their categories, and conducting periodic Risk Assessments for Identified Risks.

Overview of Risks identified for a Project

When a user clicks on the Risk tab on a Project record, they will see 2 Report Charts displaying a summary view of Risks associated with that Project.

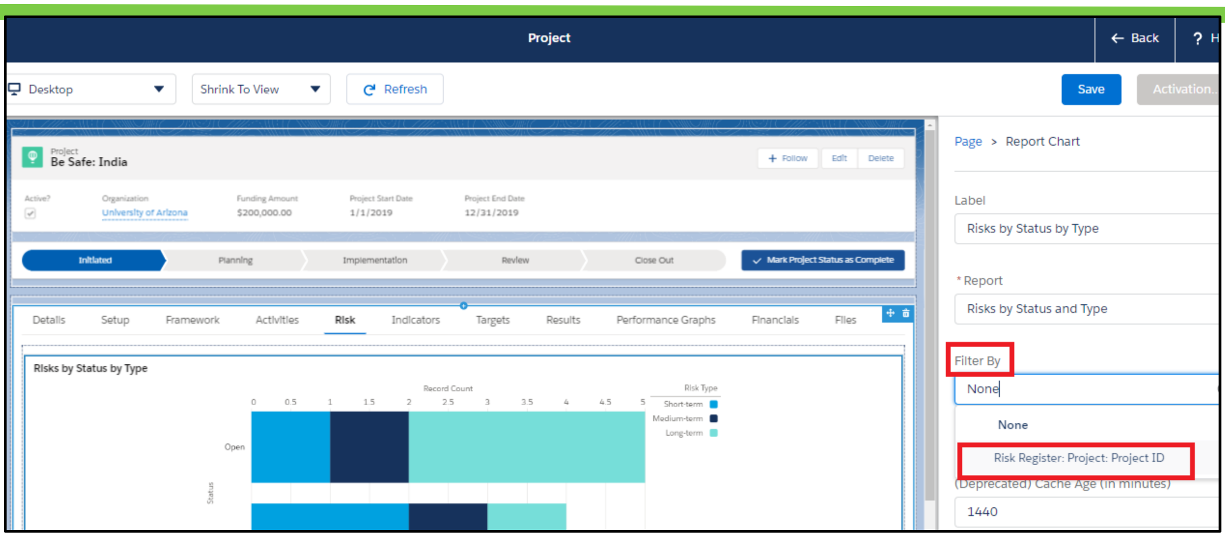
- The first report chart, labeled Risks by Status by Type, displays all the Risks divided by Risk Type (Medium Term, Short Term, and Long Term) and Status of Risk (Open, Close); *see chart below*
- The second report chart, labeled Risks by Category and Status, displays all the Risks divided by Risk Type (Medium Term, Short Term, and Long Term) and Category of Risk (Macroeconomic, Financing etc); *see chart below*



> ⓘ **Admin Note:**
> Report charts are not filtered to the current Project record out of the box, you can set up a filter to show only risks associated by using following steps

Filter Risk Report Chart for Current Record

1. Click on “Edit Page”
2. Click on Report Chart component in the Lightning App Builder
3. Click on the “Filter By” to specify the current project record



ⓘ **Admin Note:**
These Report Charts are displayed using Reports “Risks by Status and Type” and “Risks by Category and Status,” which can be found in the Amp Reports folder. Reports can be customised as per the user’s needs.

Please also note that Risk Type, and Status are (unrestricted) picklist fields on Risk__c and Actual Impact is a picklist field on Risk_Assessment__c. Their values can be updated as per Organizations’ needs.

To view the Report (and records) associated with a Report Chart, click on “View Report” at bottom left of Report Chart

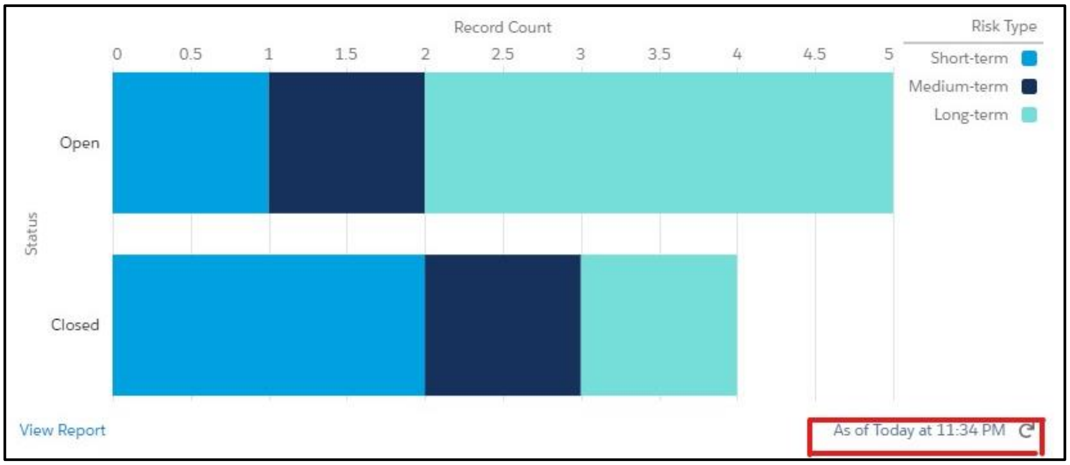
In the Report, users can view the associated records:

Report: Risks with Risk Assessments
Risks by Status and Type
This report is used to report Risks by Risk Status and Risk Type. It can be used on Risk tab of Project record filter

Status ↑	Risk Type ↑	Risk Name
Open (5)	Short-term (1)	Security Risks
	Subtotal	
	Medium-term (1)	Fraud Risks
	Subtotal	
	Long-term (3)	Policy Risks
		Capacity Risks
		Reputation Risks
	Subtotal	
ubtotal		
Closed (4)	Short-term (2)	HR Risks
		Quality Risks
	Subtotal	
	Medium-term (1)	Administrative Risks
	Subtotal	
	Long-term (1)	Increased Competition
	Subtotal	
ubtotal		
otal (9)		

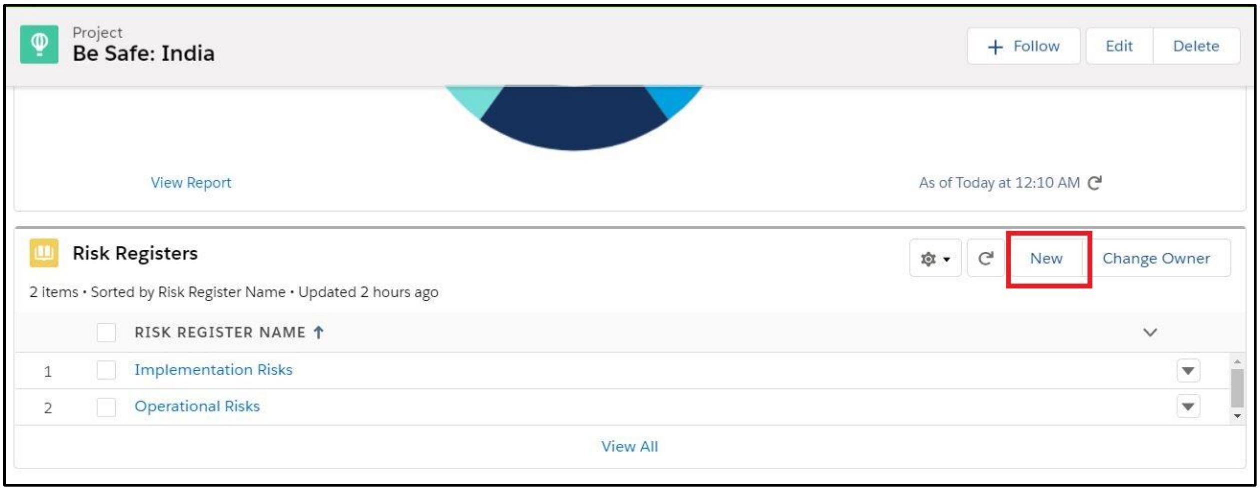
Row Counts · Detail Rows · Subtotals · Grand Total

At the bottom right of the Report Chart, users can see the time at which the chart was refreshed. If the user wants the Report Chart to reflect latest data, they can click on the “Refresh” icon.



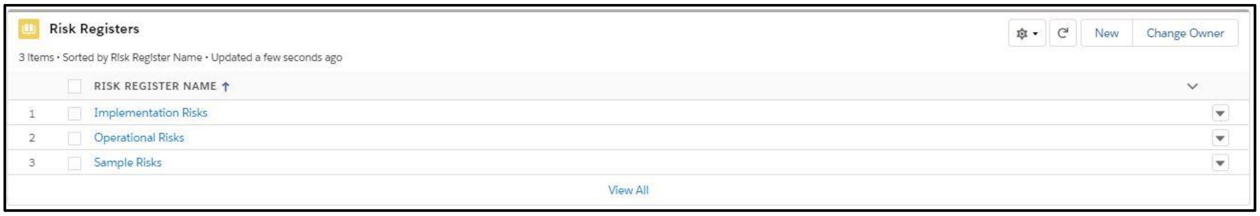
Create Risk Register(s) for a Project

A Risk Register is a collection of similar Risks, and users may define as many Risk Registers per project as needed. For example, a Risk Register called “Macroeconomic Risks” can be used to define all the Risks that a project faces due to macroeconomic changes like changes in government regulations. On scrolling to the bottom of the Risk tab, users can view the Risk Registers listed. Users can create a new Risk Register by clicking on the “New” button.



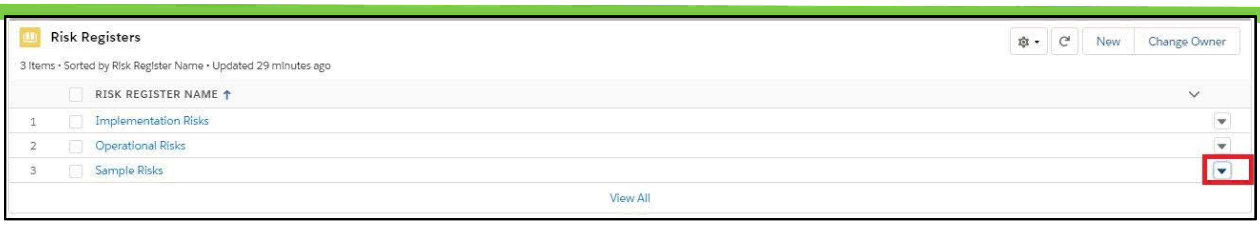
On clicking on the “New” button, a popup will display prompting the user to create a New Risk Register. The project field will automatically reflect the current Project that the user is on. To create this record, the user must enter the name of the new Risk Register and click “Save”.

On clicking “Save”, a new Risk Register record will be created and the Risk Register list on the Project record will be updated to reflect it.

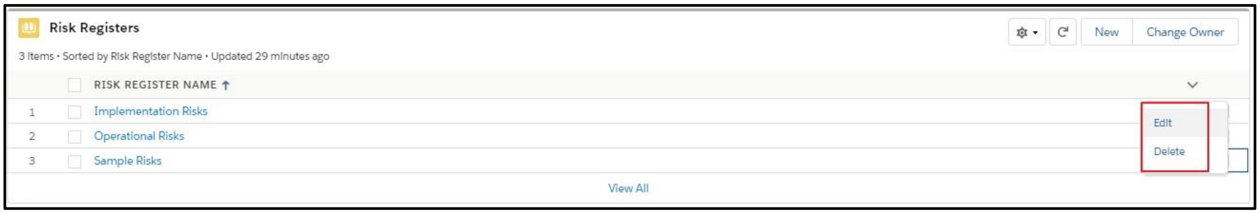


Edit/Delete a Risk Register

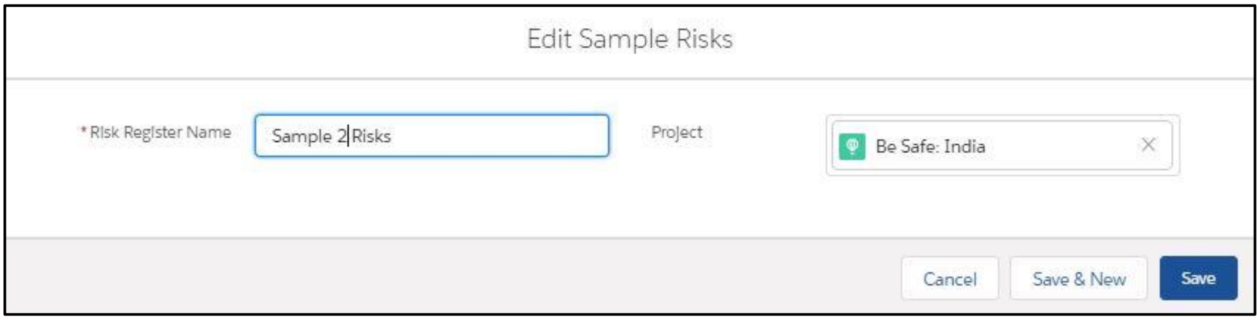
To Edit/Delete a Risk Register, the user needs to click “Show More Actions” button on the right side of the Risk Register Name.



On click of the dropdown, Edit/Delete options will be displayed

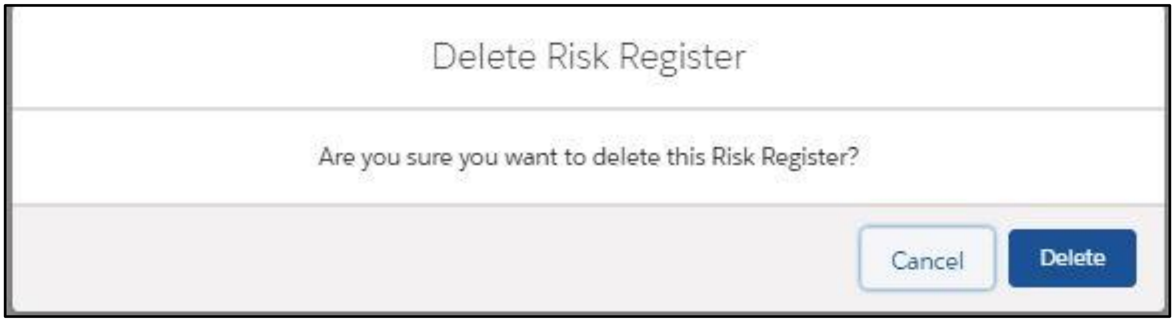


On click of “Edit,” an Edit popup will be displayed where the user can make any desired edits.



Upon clicking “Save”, the Risk Register list will display updated details

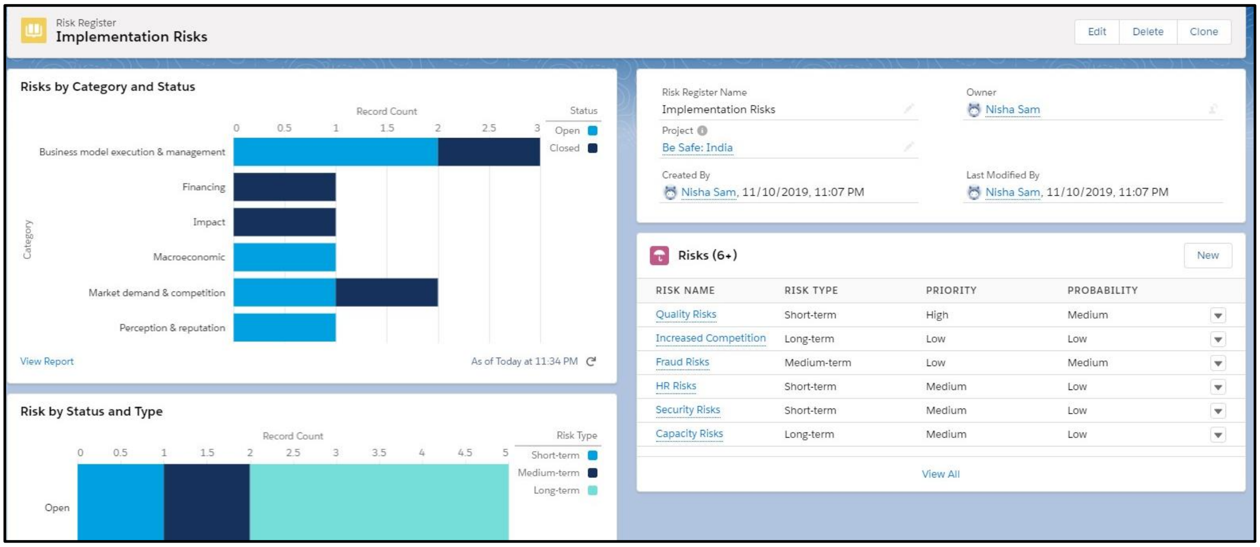
Upon clicking “Delete”, a popup will display prompting the user to confirm deleting the Risk Register



Upon clicking “Delete”, the updated Risk Register list will be displayed (see below).

View Risks in a Risk Register

On the Risk Register record, users can view all the Risks listed, and can see 2 Report charts that show a summary view of Risks associated with that Risk Register.



The first report chart, labeled Risks by Status by Type, displays all the Risks divided by Risk Type (Medium Term, Short Term, and Long Term) and Status of Risk (Open, Close)

- The second report chart, labeled Risks by Category and Status, displays all the Risks divided by Risk Type (Medium Term, Short Term, and Long Term) and Category of Risk (Macroeconomic, Financing etc)

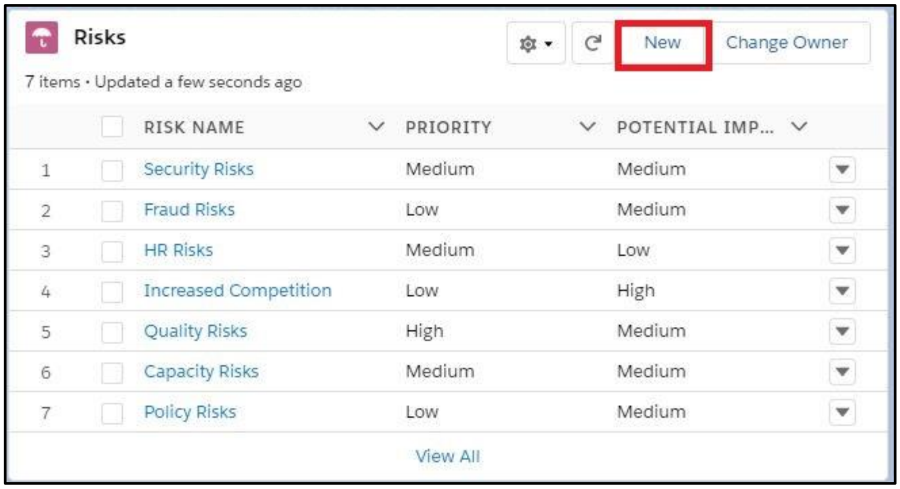
ⓘ **Admin Note:**
Report charts are not filtered to the current Risk Register record out of the box, you can set up a filter to show only risks associated by using similar steps as mentioned in this section, Filter Risk Report Chart for Current Record.

- “Risks” list on the right half of page contains all the Risk records in the list view with related information about Risk Name, Priority, Risk Type and Probability

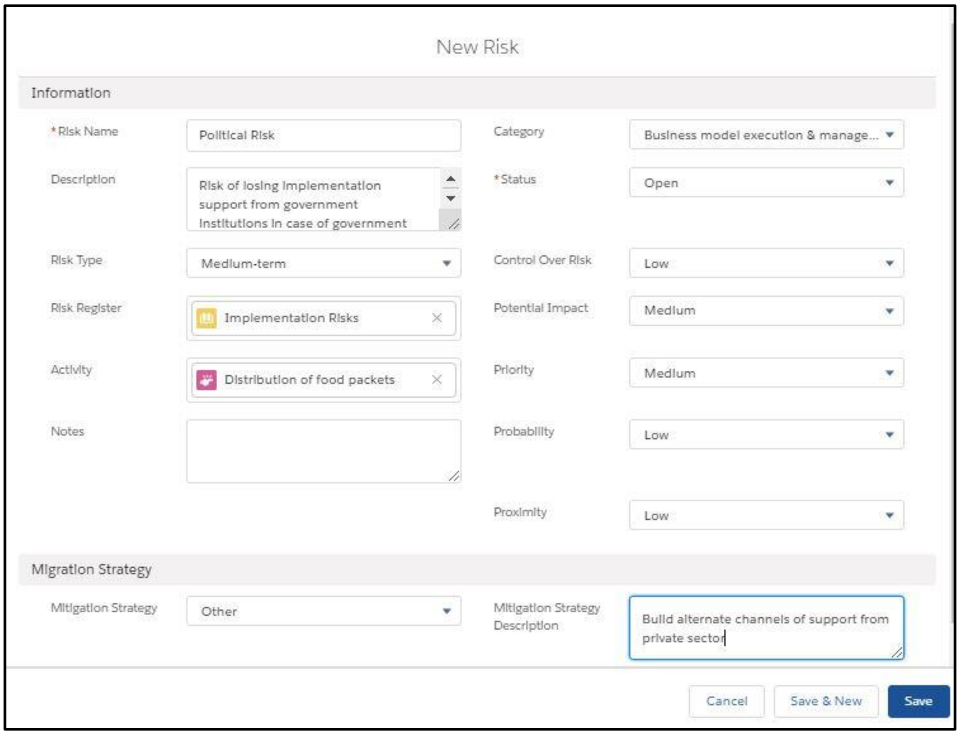
ⓘ **Admin Note:**
Report Charts are displayed using Reports “Risks by Type” and “Risks by Status” in Amp Reports folder. Reports can be customised as per User’s needs. The columns in Risk Related list can be customized from Risk Register Page Layout

Add Risks to a Risk Register

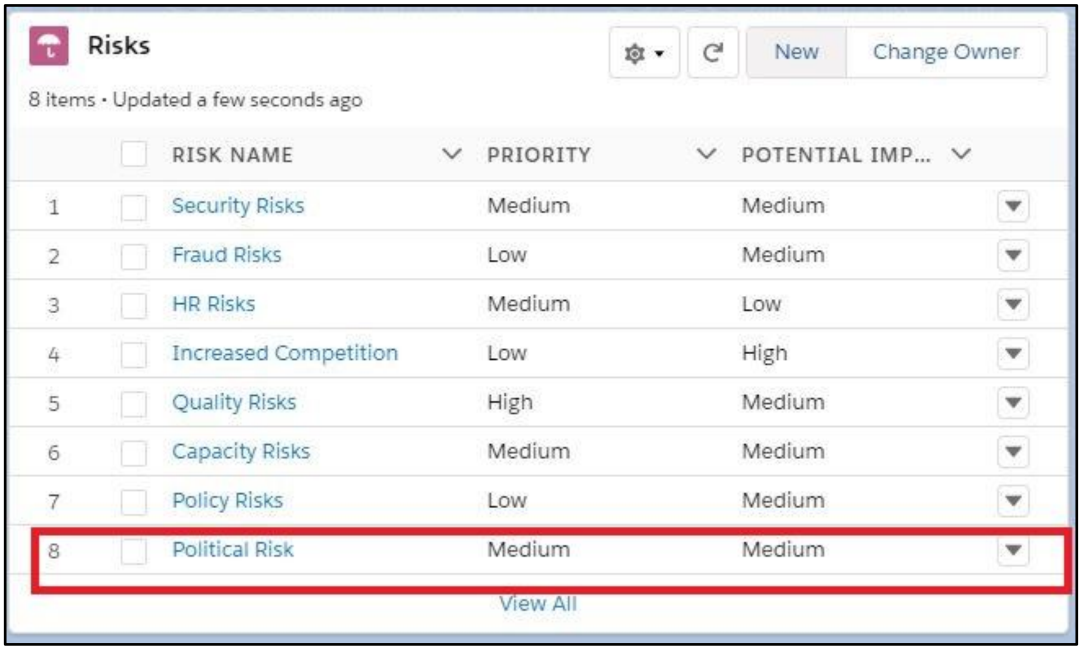
To add a new Risk to a Risk Register, the user needs to click on “New” button on Risk list



On clicking the “New” button, the Create New Risk pop-up will display. The user needs to fill all the details for a new Risk and click on the “Save” button.

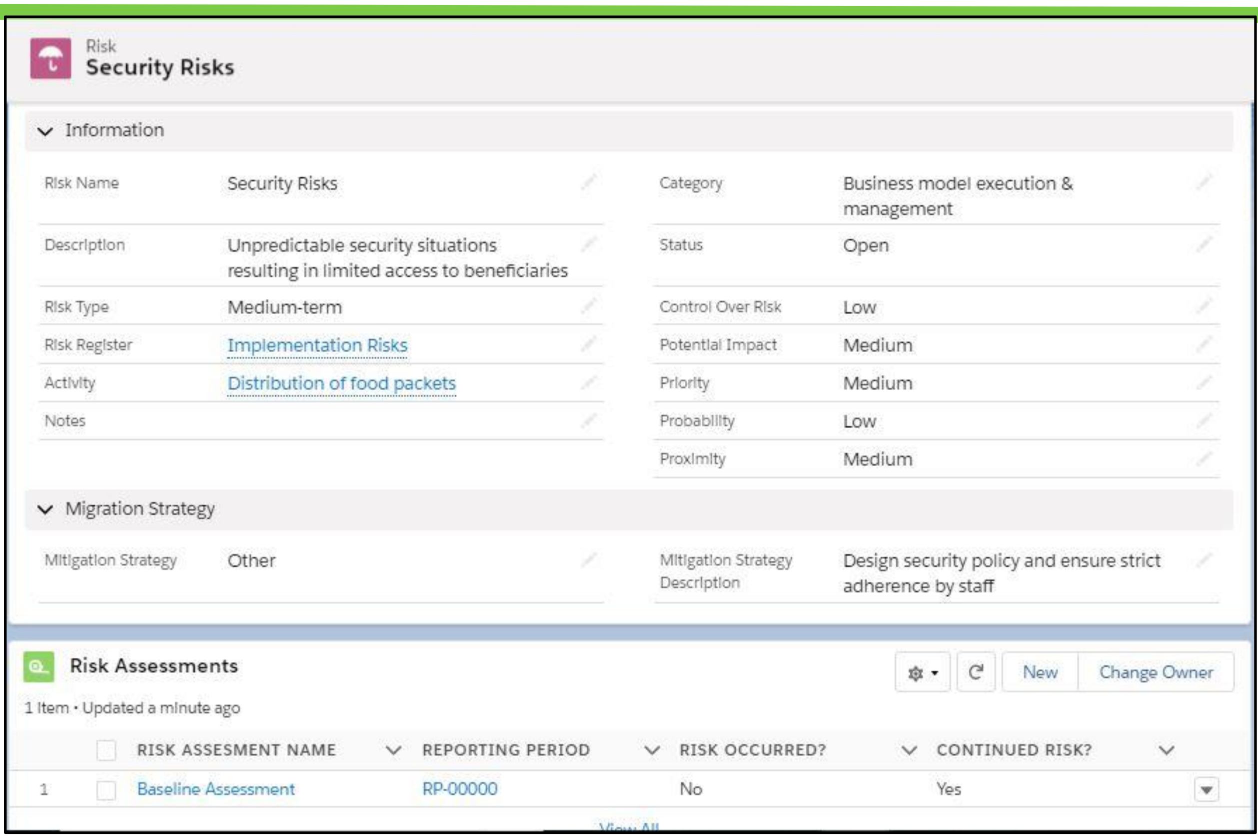


On clicking the “Save” button, the Risk record will be created and the updated Risk list will be displayed.



View a Risk

To view a Risk’s details and the associated Risk Assessments, users need to click on the Risk Name (e.g. Security Risk) . Upon clicking on the name, the user will be navigated to the Risk record page.



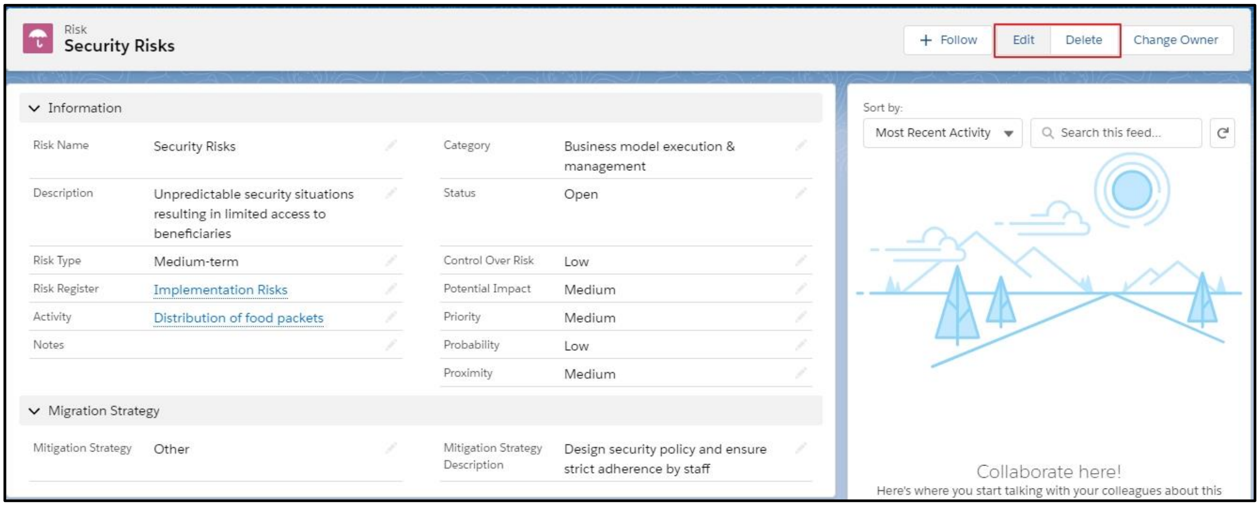
The Risk record page contains the details of a Risk, and a list of all Risk Assessments associated with it.

ⓘ **Admin Note:**
Risk details and columns in Risk Assessment Related list can be customised through Risk Page Layout.

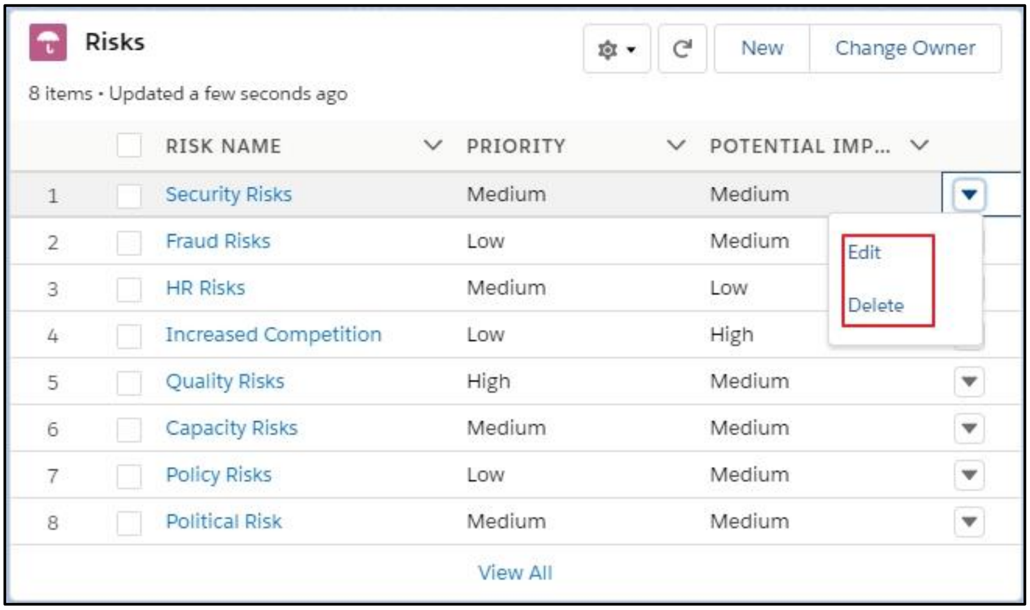
Edit/Delete a Risk

A Risk can be edited or deleted using one of the two methods outlined below: :

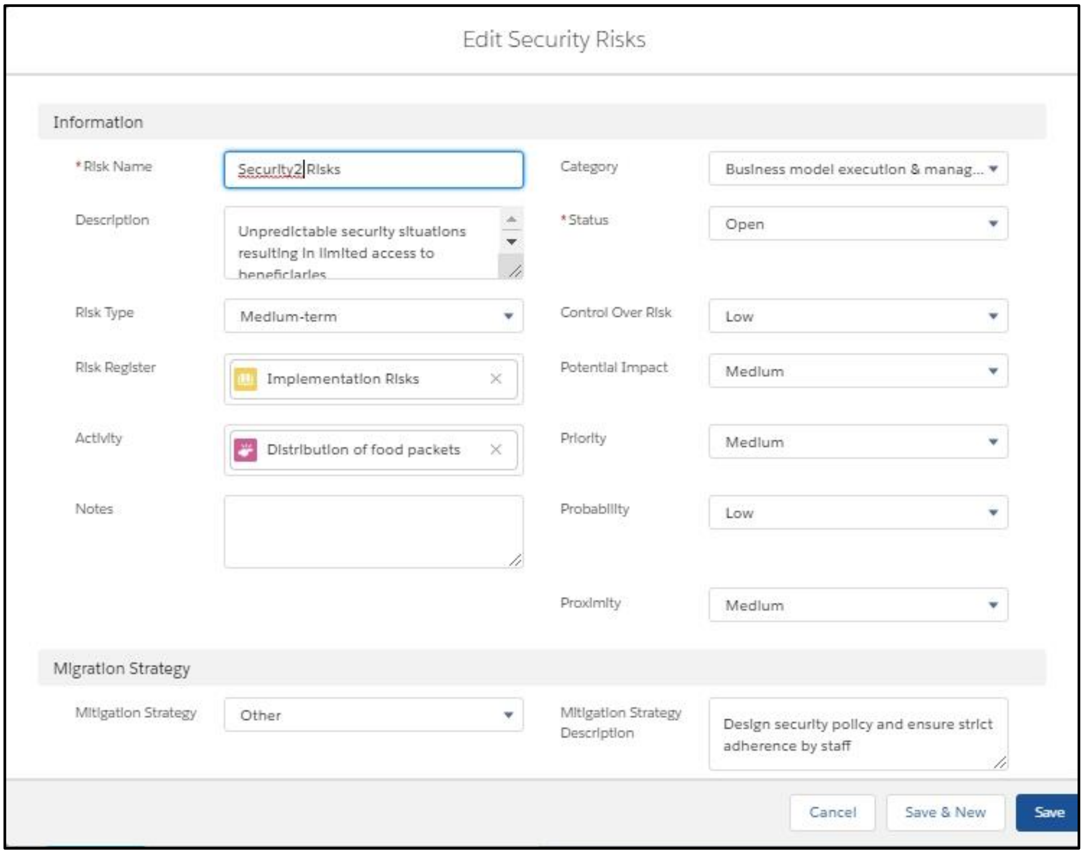
1. A user may edit or delete by navigating to the Risk page,and click on “Edit” or “Delete” button on top banner



2. A user may edit or delete from the Risk Register page by clicking the “Show More Actions” button

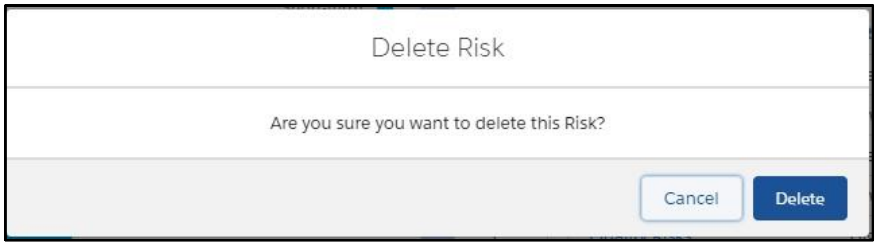


a. On click of the "Edit" button (on either Risk Register or Risk page), the Edit Risk popup displays. Users can make the changes as required and then click on "Save".

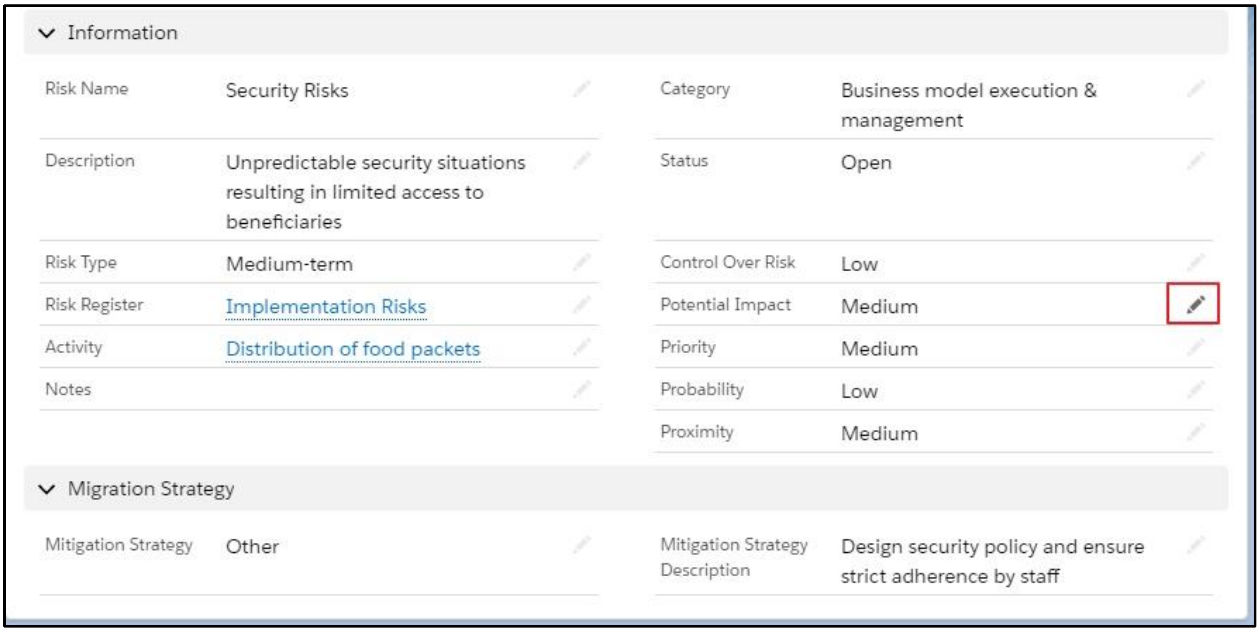


b. On clicking "Save", the Risk is updated as per the change made and the page refreshes to show the updated details

c. On clicking "Delete" (on either Risk Register or Risk page), the user sees a confirmation popup.

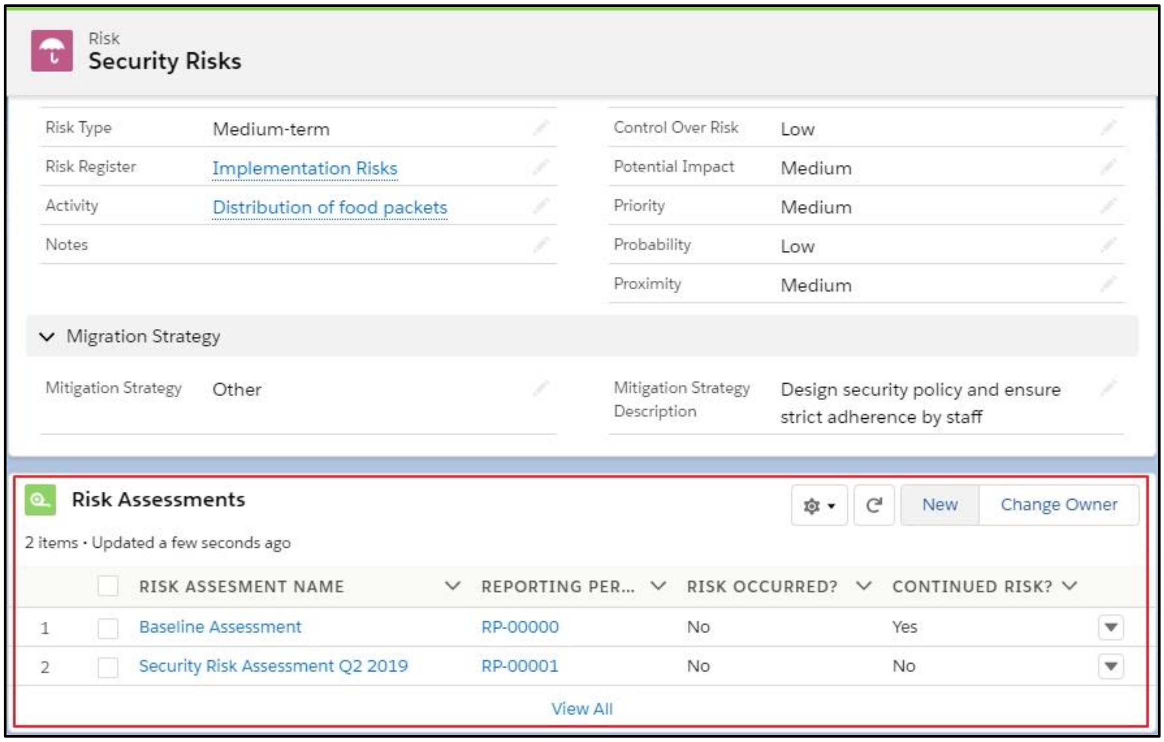


d. On clicking “Delete” in the confirmation popup, the Risk is deleted, the page refreshes and shows the updated details on Risk Register page
e. Users can also edit individual details on the Risk record page by clicking on the “Edit” icon next to field

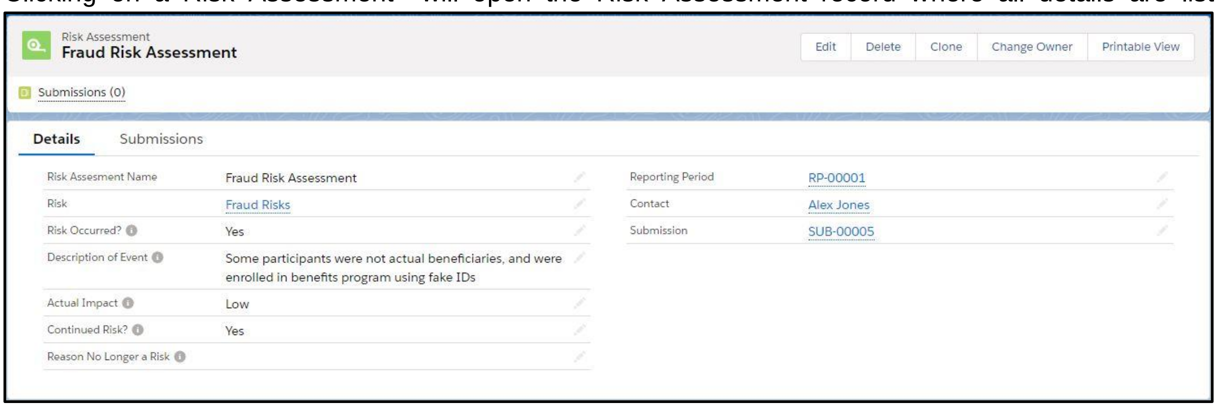


View a Risk Assessment

To view/create a list of Risk Assessments for a Risk, the user needs to scroll down the Risk page.



Clicking on a Risk Assessment will open the Risk Assessment record where all details are listed.

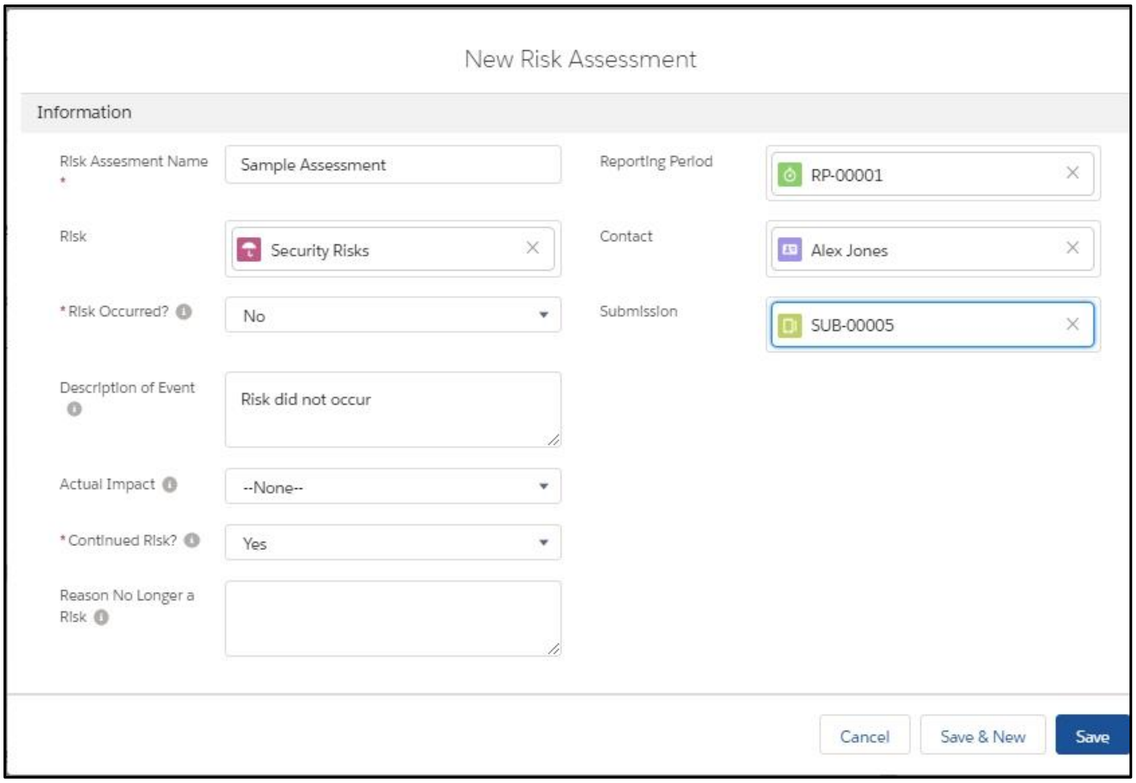


ⓘ **Admin Note:**
Details on the Risk Assessment Record page are controlled through Page Layout on ampi__Risk_Assessment__c which can be customised as per the organization's needs.

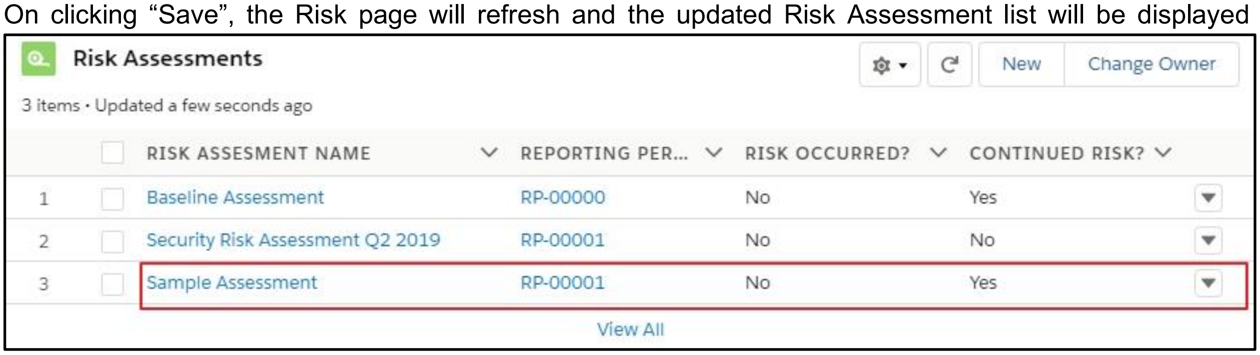
Create a Risk Assessment

To create a new Risk Assessment, users needs to click on "New" button on Risk Assessment list on Risk page

On clicking the "New" button, a New Risk Assessment popup will be displayed. In this interface, users can enter the required details, and click on "Save".



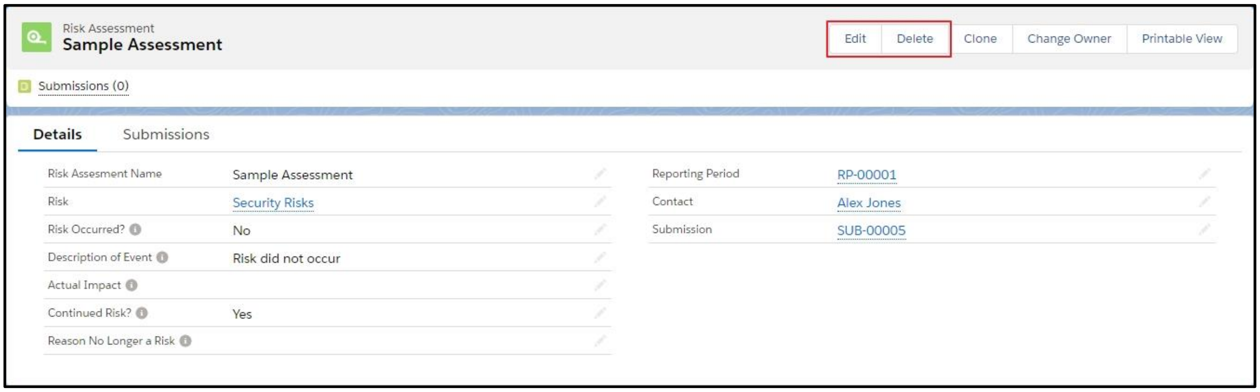
On clicking "Save", the Risk page will refresh and the updated Risk Assessment list will be displayed



Edit/Delete a Risk Assessment

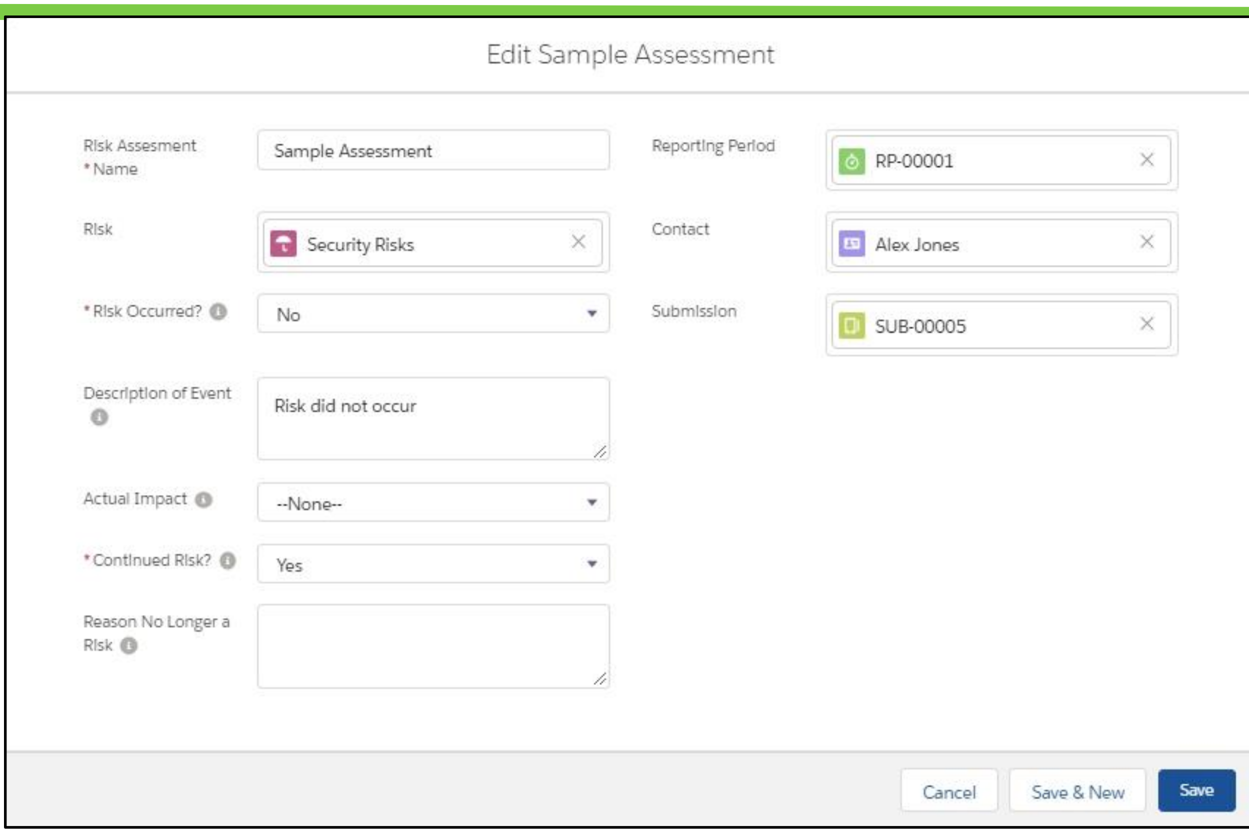
A Risk can be edited or deleted using one of the two methods outlined below::

A user may edit or delete by navigating to the Risk Assessment page and click on “Edit” or “Delete” button on top banner



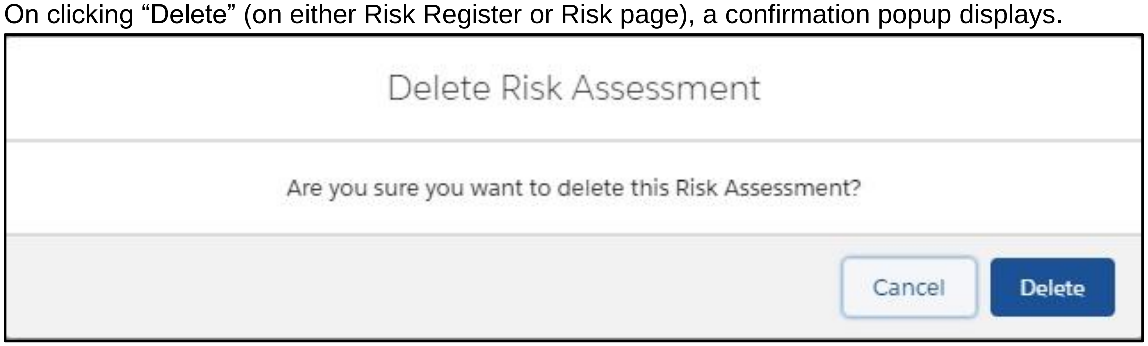
A user may edit or delete by navigating to the Risk record page from the Risk list and click “Show More Actions” button

On clicking “Edit” (on either Risk Register or Risk page), the Edit Risk popup displays. Users can make the changes as required and then click on “Save”.



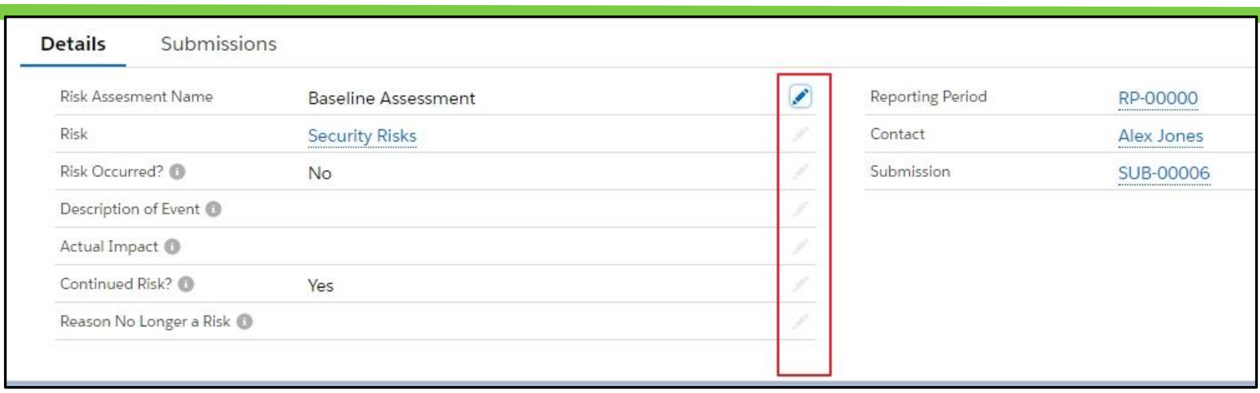
On clicking “Save”, the Risk is updated as per changes made and the page refreshes to show the updated details.

On clicking “Delete” (on either Risk Register or Risk page), a confirmation popup displays.



On clicking “Delete” in the confirmation popup, the Risk is deleted and the page refreshes/navigates to show the updated details on Risk Register page

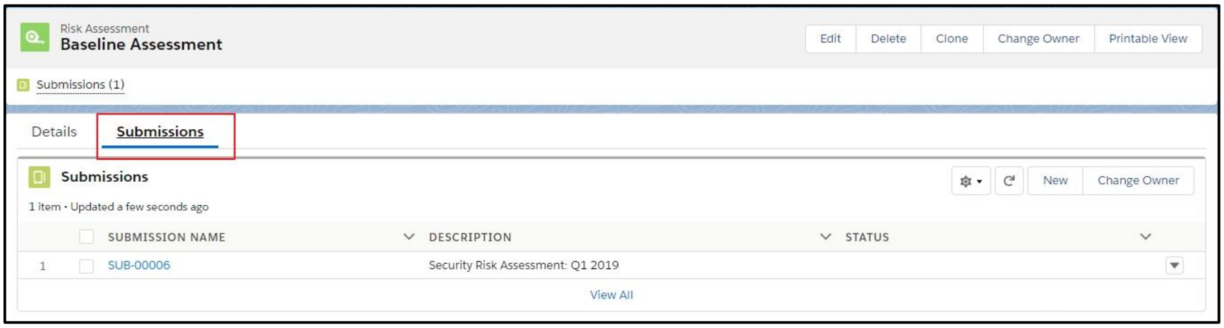
Users can also edit individual details on a Risk record page by clicking the “Edit” icon next to the field.



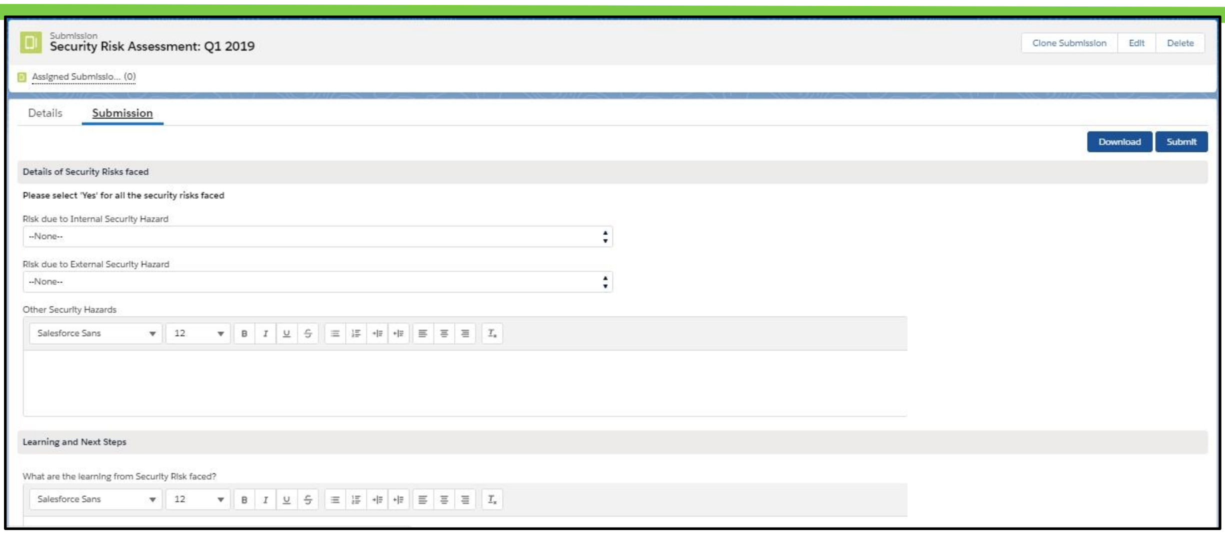
Using Submissions for Narrative Risk Reporting

The Submissions feature provides users the opportunity to collect narrative information. This can be setup both in Native Salesforce and/or Salesforce Community.

Risk Assessment information can be collected in Native Salesforce as explained above. In addition or alternatively, users can also set up the Submission feature to collect information necessary for a risk assessment. To do so, contact your System Admin to ensure the appropriate setup has been completed. Once set up, Submissions can be accessed by clicking on the “Submissions” tab on Risk Assessment.



Clicking on a Submission will open that particular Submission record where (on Submissions tab) a Narrative Report can be defined or reported upon.



ⓘ **Admin Note:**
Users must have permissions to access Submissions for a Risk Assessment. Submissions can be assigned to a Grantee/Reporter via a community. Please refer to the Submissions guide for details on how to setup Submissions and assign them to users for reporting.

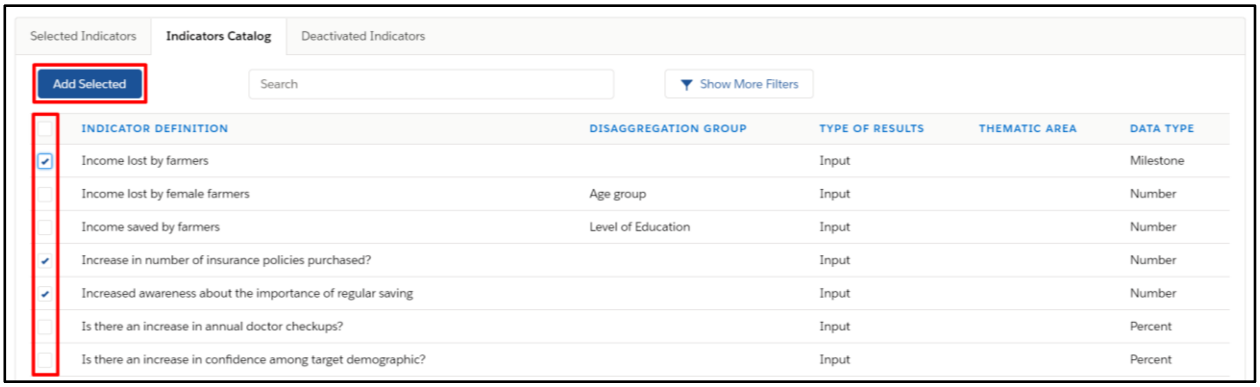
Manage Indicators

Overview: The Manage Indicators page is used to control which Indicators (catalog and/or custom) should be reported for a Project and how they should be reported (frequency, disaggregation, etc).

> ⓘ **Admin Note:**
> Users may experience a view state error on the MI page, if there are a large number of Project Indicators, Catalog Indicators and LongTextArea (LTA) fields referenced on the page. Per Salesforce limits, the page will continue to have a limit for the number of records supported. But to optimize for more records, we have made additional code changes to the page. Please check the Record Limits Per Feature section of this guide to review the updated numbers.

Create Project Indicator records from the Indicators Catalog tab

On the ManageIndicators page is a tab labeled, ‘Indicators Catalog.’ This tab allows users to view a list of standard indicators that can then be added to multiple projects, see the screenshot below. This catalog can be set-up by uploading the indicators using a tool such as dataloader.io and can streamline project setup and facilitate better reporting and aggregation of data.



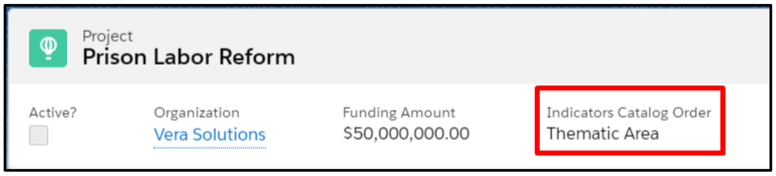
INDICATOR DEFINITION	DISAGGREGATION GROUP	TYPE OF RESULTS	THEMATIC AREA	DATA TYPE
Income lost by farmers		Input		Milestone
Income lost by female farmers	Age group	Input		Number
Income saved by farmers	Level of Education	Input		Number
Increase in number of insurance policies purchased?		Input		Number
Increased awareness about the importance of regular saving		Input		Number
Is there an increase in annual doctor checkups?		Input		Percent
Is there an increase in confidence among target demographic?		Input		Percent

- Within the Indicators Catalog, users may browse through all Indicator records in a table format.
  - The table displays each record in the first column as a hyperlink and is clickable to the record detail.
  - By default, catalog indicators are displayed according to Indicator Definition.

> ⓘ **Admin Note:**
> To customize the display of specific fields within this table, speak to your System Admin. Fields may be added to the Indicators Catalog Table by navigating to the CATALOG_INDICATORS_TABLE field set on Indicator__c object.

- The table will display all Indicator records which do not have a child Project Indicator record related to the current Project.
- By default, Indicators in the Indicators Catalog are sorted alphabetically according to Indicator Definition.

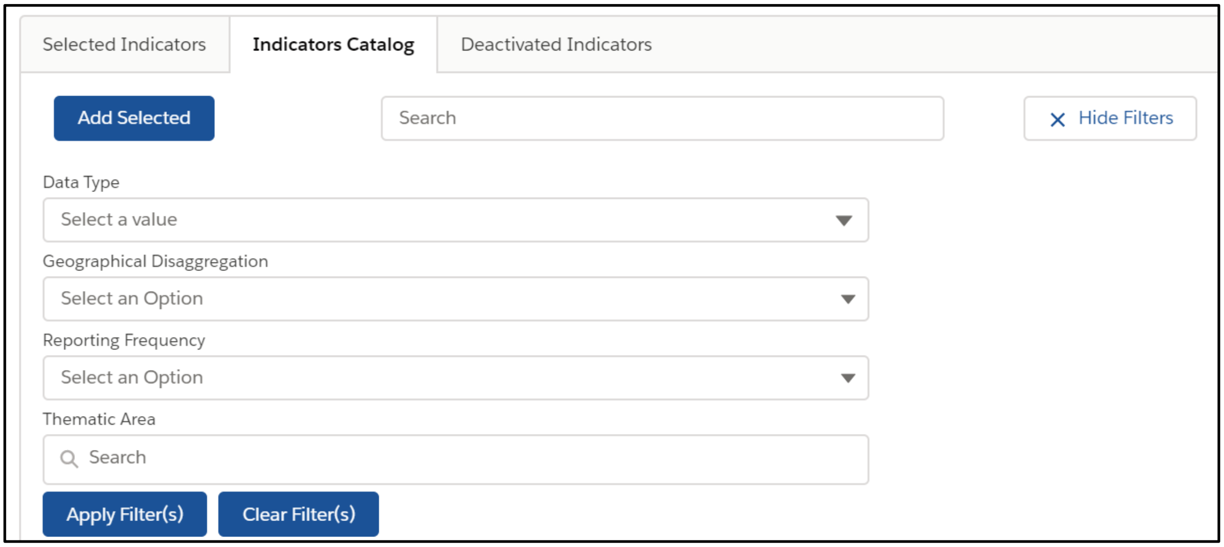
- ○ Clicking on a column header sorts the Indicators by ascending alphabetical order, by the selected field. Clicking on the column header a second time sorts them in descending alphabetical order by the selected field.
- ○ In order to specify the order in which the catalog indicators will appear in the Catalog Indicators Table, the field MI_Indicator_Order__c may be added to the Project page layout.
  - ■ This field contains a list of picklist values based on the fields that are available on the Indicator object. Choosing a value for this field will sort the catalog indicators in ascending order according to the chosen field. For example, if a user wants the catalog indicators in this table to display according to Thematic Area, navigate to the Project page layout and choose the picklist value “Thematic Area” for the order field.



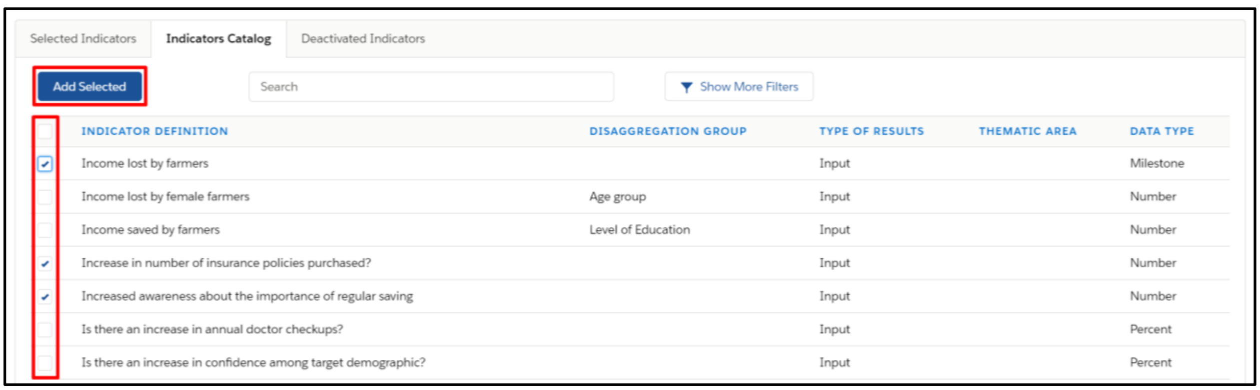
ⓘ **Admin Note:**
Users who wish to sort the order of project indicators by a custom field may speak to a system admin to create new picklist values for the MI_Indicator_Order__c field.

- ○ The table displays 10 Indicator records at a time. Other Indicators can be accessed via the pagination at the bottom of the table.

- Search for and filter Indicator records using QuickSearch, or by configuring a custom set of fields. Filtered results are ordered according to MI_Indicator_Order__c, or alphabetically if the field is NULL.
  - ○ If additional filter criteria is included and the user clicks Apply Filters, then the list of Indicators is further filtered to that criteria.
  - ○ As text is entered into the QuickSearch bar as shown in the screenshot below, the Indicators displayed in the table are filtered down by those that contain the input text.
    - ■ QuickSearch Input must exceed 2 characters for results to display.



- The ampi__INDICATOR_CATALOG_SEARCH_FILTER field set can be configured to filter by specific, custom or standard fields. The following fields are available out of the box with Amp Impact:
    - Data type
    - Geographic Disaggregation
    - Reporting Frequency
    - Thematic Area
- For further customization, please speak to your system admin and refer to the Installation Guide.
- When "Clear Filters" is clicked, the filters are all cleared and the table reverts to display all Indicator records in the catalog.
- To create Project Indicator records from the Indicators Catalog, the user can click the checkbox on the left of all relevant rows of Indicator data in the table and click the Add Selected button.



- When the Add Selected button is clicked, Project Indicator records and any applicable junction records are created. The Indicator is then removed from the Indicators Catalog table and added to the Selected Indicators table. The user is then taken to the Selected Indicators page.

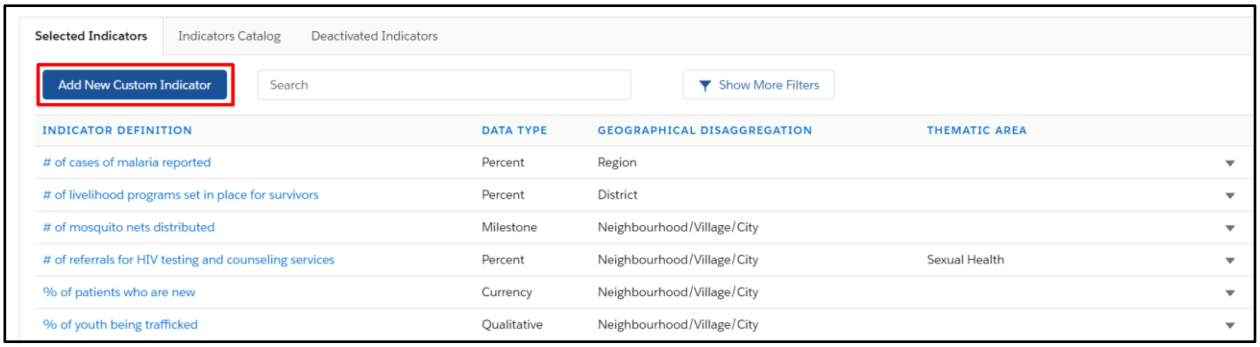
ⓘ **Admin Note:**
Project Indicators are displayed in alphabetical order and newly added indicators from the Indicators Catalog will display in alphabetical order.

- Selections apply only for the current page of Indicators. If the user selects Indicators from one page, but navigates to a new page, the selected indicators from the previous page are disregarded when the Add Selected button is clicked.

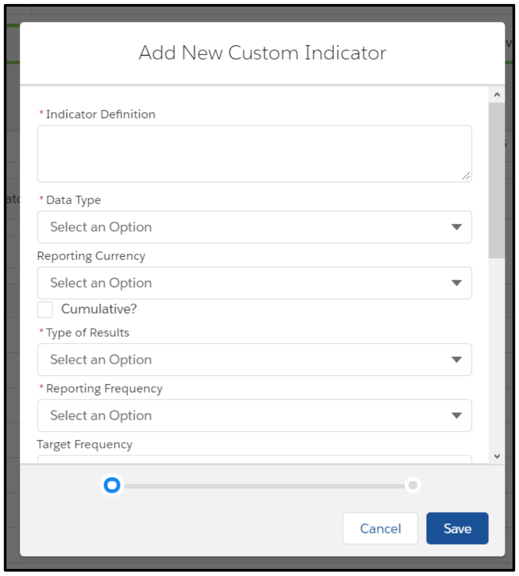
Create custom Project Indicator records from the Selected Indicators tab

Create custom indicators for the current project and manage indicators that have already been added to the project.

When the Add New Custom Indicator button is clicked, a pop-up opens.



This pop-up displays the fields in the ADD_NEW_INDICATOR_POPUP field set on the Indicator object. You can use the field set to control which fields are displayed in the pop-up for the user to enter information on while creating the new project indicator.



When creating a new Project Indicator, certain fields are required to ensure the Indicator is accurately created in the Project. All new Project Indicators require an Indicator Definition, Data Type, Reporting

Frequency and Geographic Disaggregation. All other attributes for a Project Indicator are voluntary but users can add new required fields to the field set per their organization's requirements.

ⓘ **Admin Note:**
If the System Admin has defined default values for custom or out of the box fields on ampi__Indicator__c, then the default values will be automatically populated when the user creates a new custom ampi__Project__Indicator__c using the Add New Custom Indicator pop-up and when the user adds an ampi__Indicator__c to the current ampi__Project__c using the Indicator Catalog tab on Manage Indicators page.

Note that some fields have default values predefined out of the box:

- ampi__Include_In_Catalog__c = TRUE
- ampi__Red_Yellow_Threshold__c = 75
- ampi__Yellow_Green_Threshold__c = 100

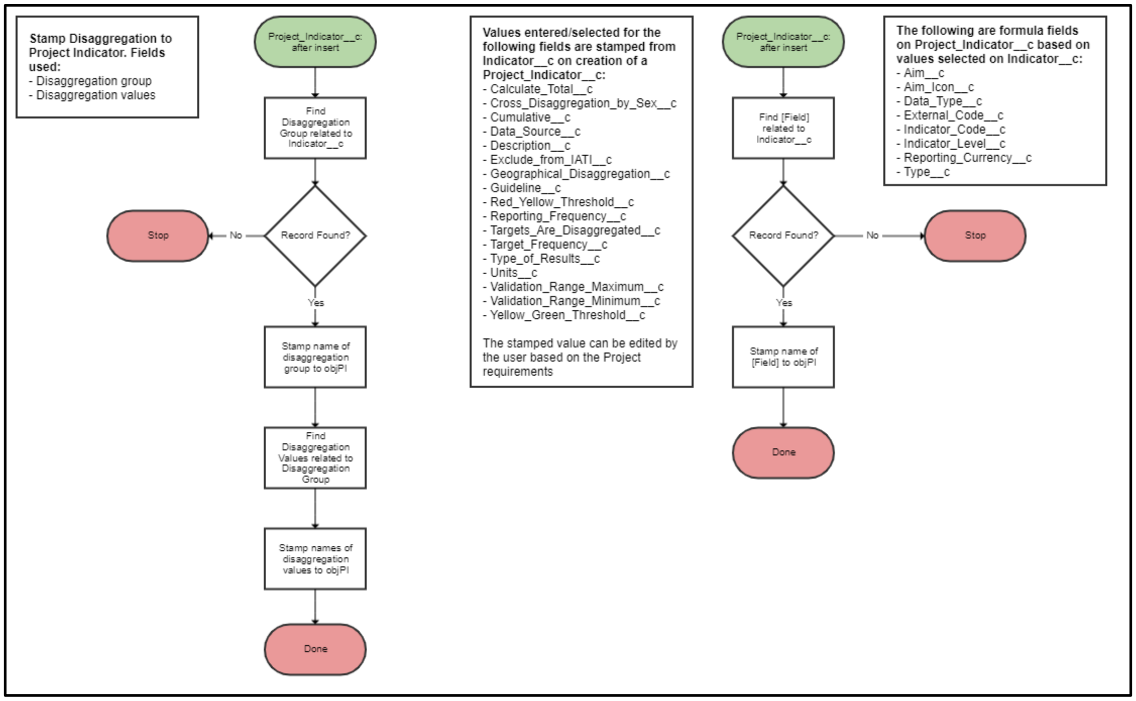
On the 'Add New Custom Indicator' popup is a field labeled 'Include in Catalog?' This checkbox field controls the availability of the Indicator to the projects created. When creating a custom Indicator, the Indicator can either be:

- Added to only the current Project (ampi__Include_in_Catalog__c = FALSE)
- Added to the current Project and made available to all other Projects (ampi__Include_in_Catalog__c = TRUE)
- By default, the field ampi__Include_in_Catalog__c is selected as TRUE (that is, it is checked), which adds the Indicator to the Selected Indicators table for the current project and the Indicator Catalog for all other projects.
  - If the field is FALSE (that is, it is unchecked), the Indicator will only be added to the Selected Indicators table for the current project. If this indicator is later removed from the project, then it will display in the Indicator Catalog for that project only, and it does not display in the Indicator Catalog for any other projects.
  - In order to change the value of the field ampi__Include_in_Catalog__c for a particular indicator, a user must open the indicator record in native Salesforce. The value in this field may not be changed by editing a project indicator via ManageIndicators page. The data load on MI page is only affected by Indicator records where ampi__Include_In_Catalog_c = TRUE. e.g. If there are 200 Indicators but only 100 indicators have ampi__Include_In_Catalog_c = TRUE, then only those 100 indicators contribute to data load.

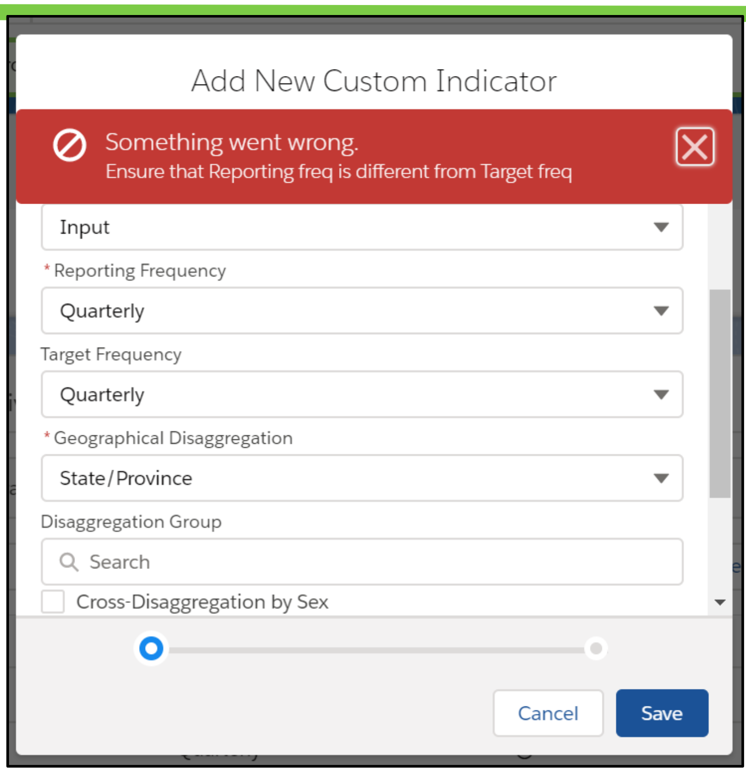
When the user clicks Save:

- A new Indicator record is created with the input data.
- A Project Indicator record is created child to the current Project and the newly created Indicator record.
  - Applicable junction records, like ampi__Project_Indicator_Geographic_Area__c and ampi__Project_Indicator_Reporting_Period__c, are created.
  - If certain fields like Disaggregation_Group__c are populated, then a new junction record Disaggregated_Project_Indicator__c is created.
- The following diagram describes the relationship between data on the Indicator record and the Project Indicator record:

- Data from some fields is stamped from the Indicator to Project Indicator record. This data can be modified and customized for the Project Indicator record and does not impact the Indicator record.
- Data from some fields on the Indicator record carry over to the Project Indicator record using formula fields. This data cannot be modified for the Project Indicator record.



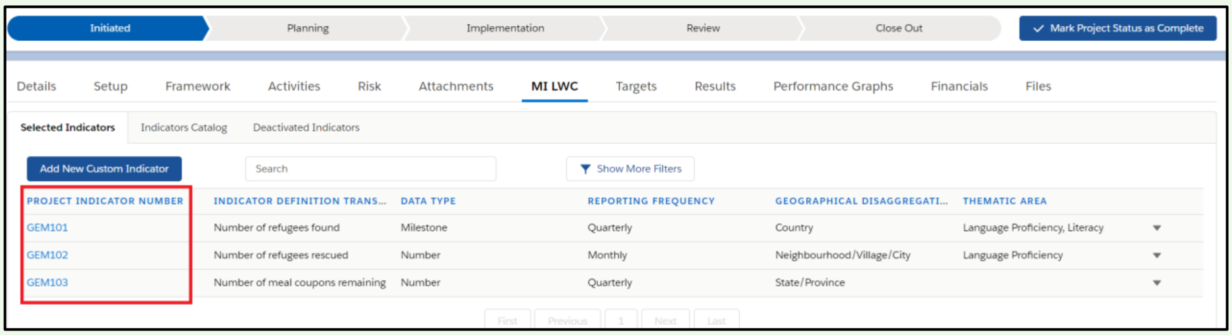
- If a System Admin has configured validation rules on the Project_Indicator__c object, then the user will be unable to save or edit a record if it does not meet the validation criteria. See screenshot below.



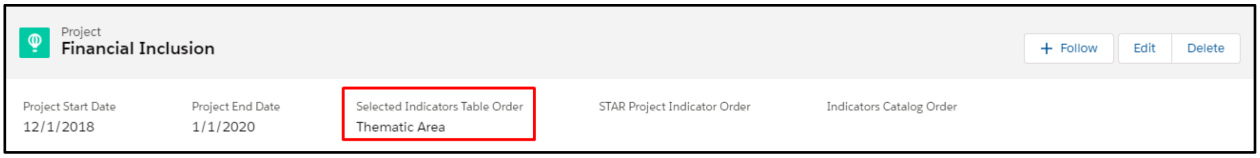
- View all the Project Indicator records related to the project in a table format
    - The table displays each record in the first column as a hyperlink and is clickable to the record detail.
    - By default, Project Indicators in the Selected Indicators table are sorted alphabetically according to Indicator Definition.

ⓘ **Admin Note:**
To customize the display of specific fields within this table, speak to your System Admin. Fields may be added to the Selected Indicators Table by navigating to the SELECTED_PROJECT_INDICATORS_TABLE field set on Project_Indicator__c object.

The first column in the Selected Indicator table always displays with a hyperlink to the respective project indicator record.



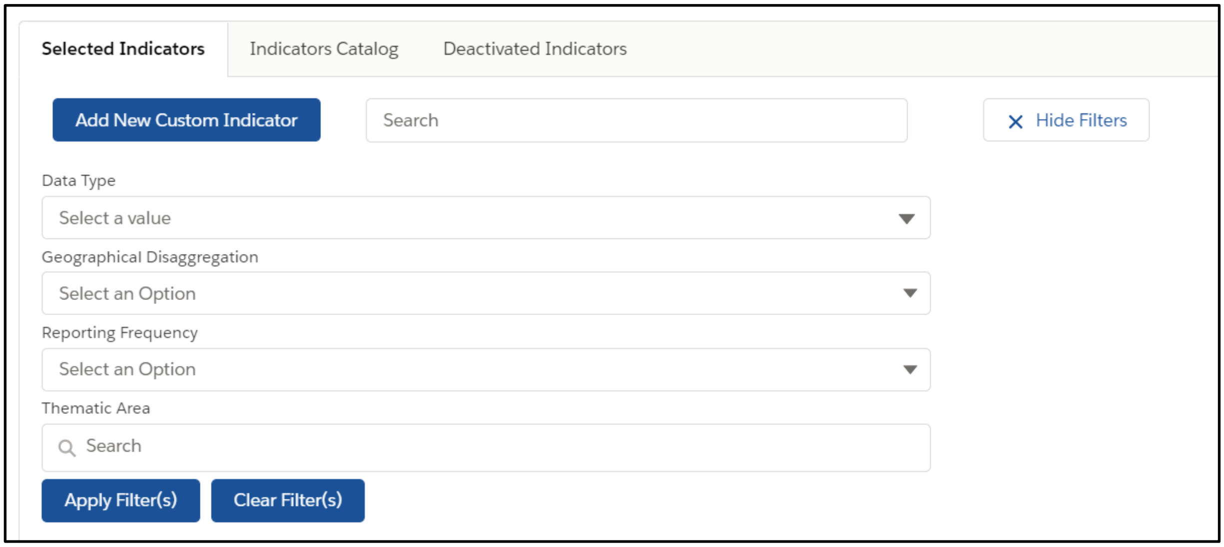
- Clicking on a column header sorts the project indicators in ascending alphanumeric order, by the selected field. Clicking on the column header a second time sorts them in descending alphanumeric order by the selected field.
    - In order to specify the order in which the project indicators will appear in the Selected Indicators Table, the field MI_Project_Indicator_Order__c may be added to the Project page layout. It contains a list of picklist values based on the fields that are available on the Project_Indicator__c object. Choosing a value for this field will display project indicators in ascending order according to the chosen field.
        - For example, if a user wants project indicators in this table to display according to Thematic Area, navigate to the Project page layout and choose the picklist value “Thematic Area”. By default, the order of the catalog indicators are according to indicator definition.



ⓘ **Admin Note:**
Users who wish to sort the order of project indicators by a custom field may speak to a system admin to create new picklist values for the MI_Project_Indicator_Order__c field.

- The table displays 10 Project Indicator records at a time. Other Project Indicators can be accessed via the pagination at the bottom of the table.
- When the Comment icon is clicked, a pop-up window opens where the user can enter comments about the Project Indicator. On click of Save, these comments are saved to the Project Indicator’s Notes field. On click of Cancel, any changes made are discarded.

- Search for and filter Project Indicator records related to the project
    - As text is entered into the QuickSearch Search bar, the table is filtered down to display only those project indicators that contain the input text in any of the fields added to the project indicator table or the filterset.
        - QuickSearch Input must exceed 2 characters for results to display.



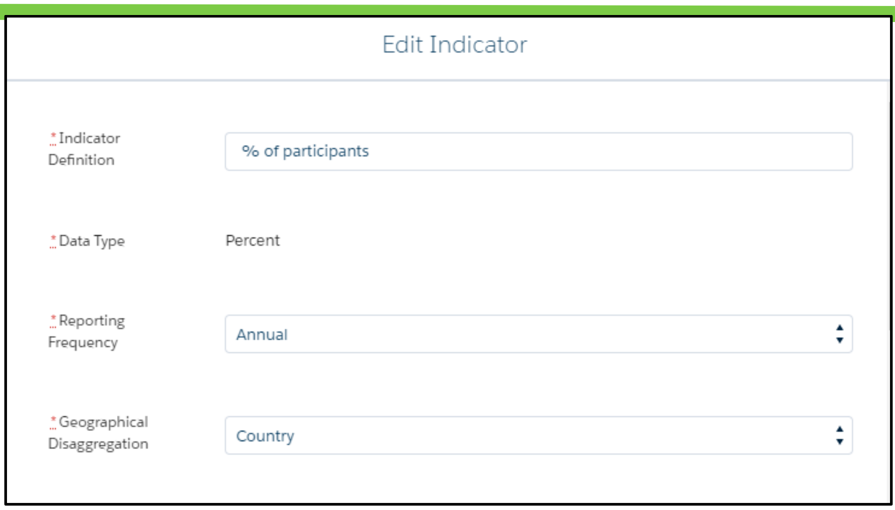
- The ampi__PROJECT_INDICATORS_SEARCH_FILTERS field set can be configured to filter by specific, custom or standard field types. The following fields are available out of the box with Amp Impact:
  - Data type
  - Geographic Disaggregation
  - Reporting Frequency
  - Thematic Area

ⓘ **Note:**
Please note that when Quick Search and Filters are used together, the table displays only those results which match both criteria: the text in the quick search bar and specified filter criteria.

For further customization, please speak to your system admin and refer to the Installation Guide.

Modify Project Indicator records related to the Project

When the Edit icon is clicked, the Edit Indicator pop-up window opens.

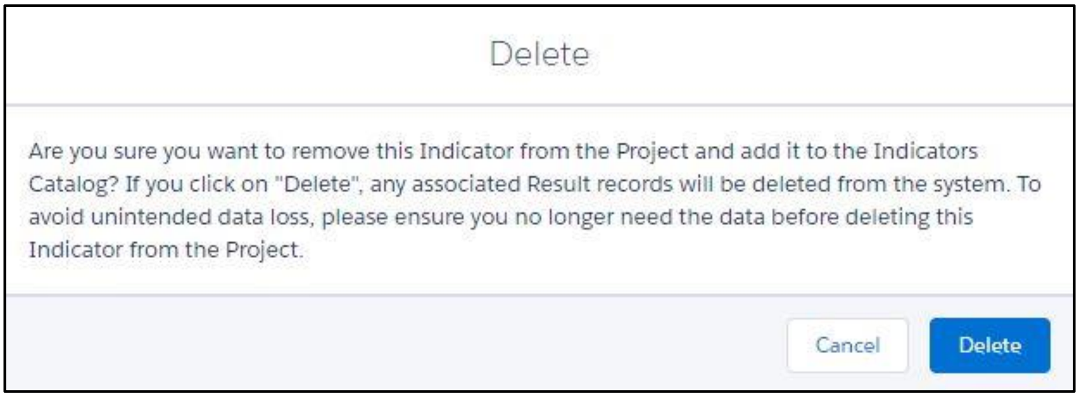


- This pop-up displays the fields contained in the EDIT_PROJECT_INDICATOR_POPUP field set on the Project_Indicator__c object. Adding or removing fields from the field set will control which fields show in the pop-up.
    - Some fields are not editable on the Project Indicator through the Edit icon. If a user chooses to display the following fields in the field set - Aim, Data Type, Reporting Currency - these will not be editable since these are formula fields from the Indicator object. The rationale for creating these as formula fields is that editing any of these attributes significantly alters the meaning of that Project Indicator and for data integrity purposes, changing those fields should require creating a new indicator.
    - For each Project Indicator, users can choose the number of decimal points for data entry per your reporting requirements. When a Project Indicator is created, by default, it is set to be reported with no decimal points. Change and customize this per Project Indicator to increase the number of decimal points by adding the Number of Decimal Places Allowed field to the field set or by opening the particular Project Indicator record. This field supports up to 2 decimal places.
    - If a user chooses to add Reporting_Currency__c to this field set, the value will be displayed but will not be editable through the edit icon. In addition, this field will display a blank for any Project Indicator with Data Type ≠Currency

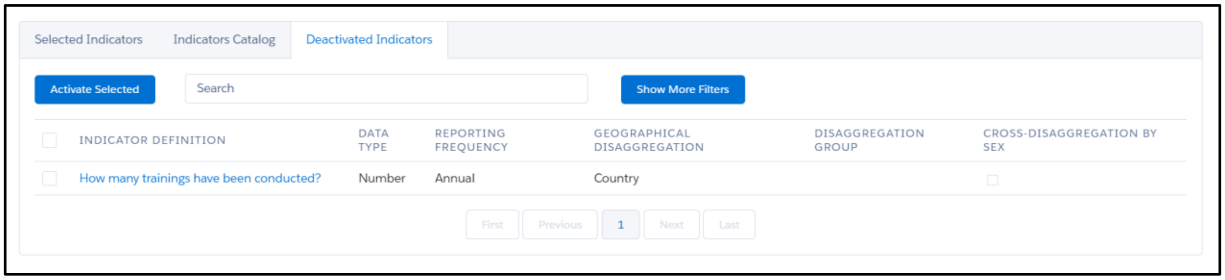
Remove Project Indicator records related to the Project

Amp Impact has two options for removing Project Indicators from a project: deletion and deactivation.

A Project Indicator record can be deleted by clicking on the Delete (trash bin) icon next to the Project Indicator in the Selected Indicators table. On click of the Delete icon, the user will be prompted to confirm the delete action.



When the deletion is confirmed, the Project Indicator record is deleted, along with any of its associated records (i.e. Results, Project Indicator Reporting Period, Project Indicator Geographic Area, etc.). The Project Indicator and its related data are no longer displayed on any of the Visualforce pages.

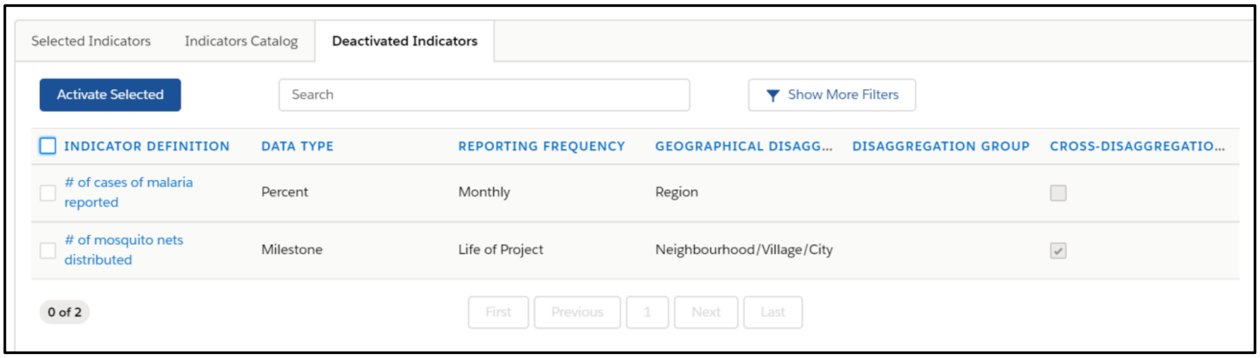


A Project Indicator can be deactivated by editing a Project Indicator in the Selected Indicators table and de-selecting the Active checkbox and setting it to FALSE in the Visualforce page. (See this section on how to deactivate Project Indicators in the Lightning Web Component.) When the record is saved, the Project Indicator record is no longer displayed on any of the Visualforce pages - except for ManageIndicators, where it is moved to the Deactivated Indicators tab.

> ⓘ **Admin Note:**
> When a Project Indicator is deactivated, any Project Indicator Reporting Period records that have a Start Date after the deactivation date are deleted so no empty records exist in the system.

Manage Deactivated Project Indicator records related to the Project

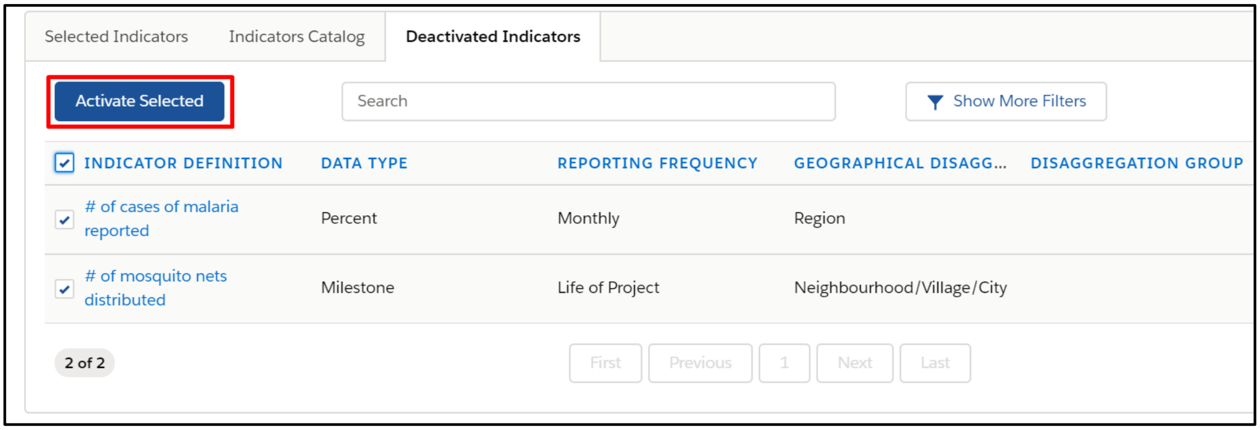
On the ManageIndicators page there is a tab labeled, 'Deactivated Indicators.' This tab allows users to view a list of deactivated project indicators. See the screenshot below.



- Within the Deactivated Indicators tab, users may browse through all deactivated project indicators.
    - The table displays each record in the first column as a hyperlink and is clickable to the record detail.
    - By default, deactivated project indicators are ordered according to Indicator Definition.
- Clicking on a column header sorts the deactivated project indicators in ascending alphanumeric order, by the selected field. Clicking on the column header a second time sorts them in descending alphanumeric order by the selected field.
- The table displays 10 deactivated Project Indicator records at a time. Other deactivated Project Indicators can be accessed by toggling between pages at the bottom of the table.
- Search for and filter deactivated Project Indicator records related to the project.
    - As text is entered into the QuickSearch Search bar, as shown in the screenshot above, the project indicators displayed in the table are filtered down by those whose Data Type or Thematic Area contain the input text.
    - The project indicators field set can be configured to filter by specific, custom or standard field types. The following fields are available out of the box with Amp Impact:
        - Data type
        - Geographic Disaggregation
        - Reporting Frequency
        - Thematic Area

For further customization, please speak to your system admin and refer to the Installation Guide.

To reactivate Project Indicator records from the Deactivated Indicators table, the user can click the checkbox on the left of all relevant rows of Project Indicator data in the table and click the Activate Selected button. See screenshot below.



- When the Activate Selected button is clicked, the Project Indicator is then removed from the Deactivated Indicators table and added to the Selected Indicators table.

Use search bar and filters for specific types of indicators across Selected, Catalog, and Deactivated Indicators table

a. As text is entered into the QuickSearch Search bar, the project indicators displayed in the table are filtered down by indicators that contain the input text.
b. The project indicators field set can be configured to filter by specific, custom or standard field types. The following fields are available out of the box with Amp Impact:
    i. Data type
    ii. Geographic Disaggregation
    iii. Reporting Frequency
    iv. Thematic Area
    v. For further customization, please speak to your system admin and refer to the Installation Guide.

> ⓘ **Note:**
> Please note that when Quick Search and Filters are used together, the table displays only those results which match both criteria: the text in the quick search bar and specified filter criteria.

Visualforce and Lightning Web Component Differences

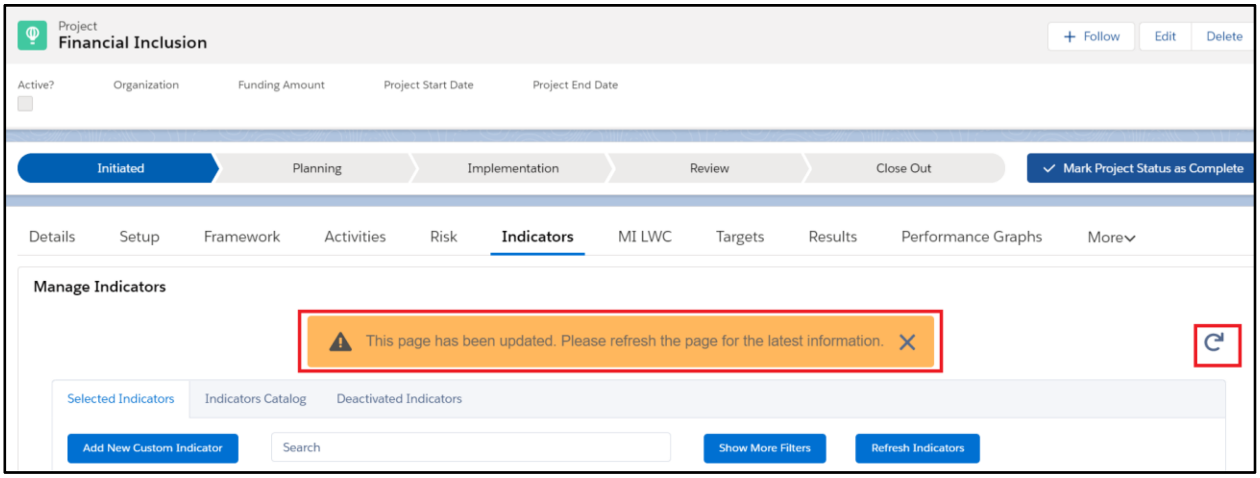
Amp Impact v1.25 and up have the option to display the Manage Indicators page as a Lightning Web component instead of Visualforce page. Please take note of the following differences between the Lightning Web component and Visualforce page below.

Notification of changes on related pages

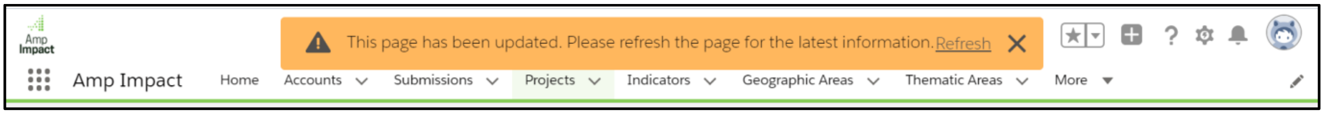
If edits are made to the ManageIndicators page, for example, any time a Indicator or Project Indicator is added, deleted, or edited, the Visualforce pages listed below will display a Refresh icon and an orange warning sign alerting the user that the data on that page is not updated with the most accurate data.

Impacted Visualforce pages: Activities, ManageFramework, SetTargets, AddResults, PerformanceGraph

Display on Visualforce: Clicking on the Refresh icon on the Visualforce page will refresh that page to update and account for any changes made on ManageIndicators page. Refer to the screenshot below.



Display on Lightning Component: Clicking on the Refresh hyperlink within the notification toast will refresh that page to update and account for any changes made on ManageIndicators page. Refer to the screenshot below.

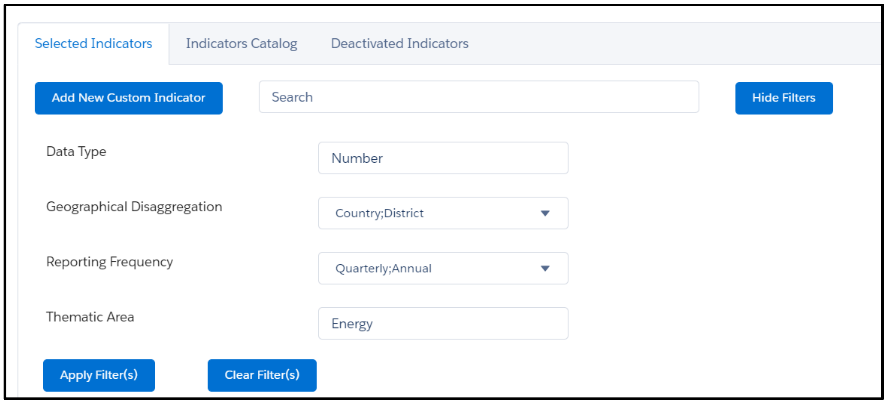


Dynamic Search Filters

The search filters for Indicators and Project Indicators across the Manage Indicators table tabs vary from Visualforce to Lightning Web Component.

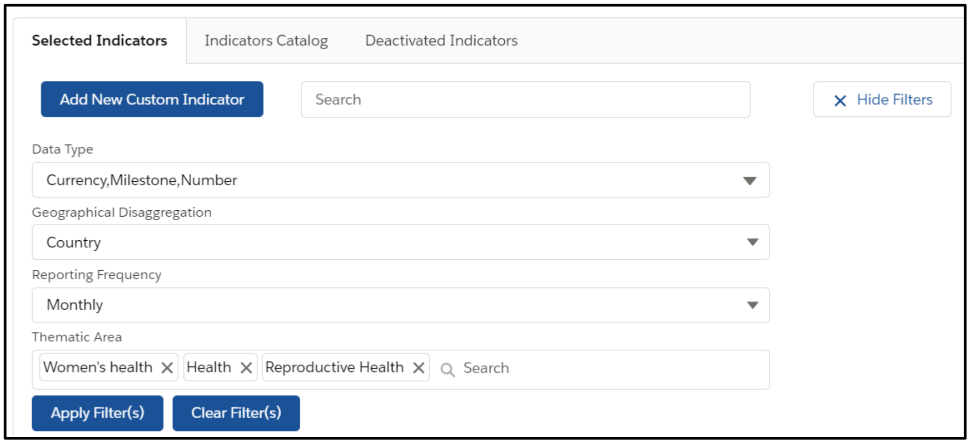
Display on Visualforce page: Clicking on Show More Filters expands the search filters added to the appropriate field set. Note the display of the following out of the box filter field types:

- Data Type displays as text input field.
- Long Text Area rollup fields like Thematic Area and Objective(s) display as text input fields.
- Geographic Disaggregation and Reporting Frequency display as multi-select picklist fields.



Display on Lightning Component: Clicking on Show More Filters expands the search filters added to the appropriate field set.

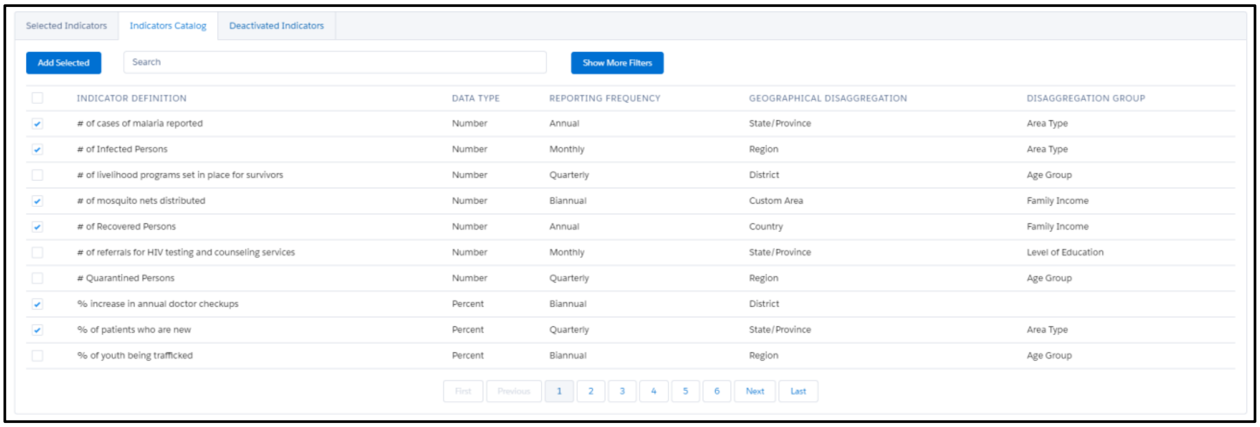
- Data Type displays as a multi-select picklist field.
- Long Text Area rollup fields like Thematic Area and Objective(s) display as multi-select picklist fields with pill boxes.
- Geographic Disaggregation and Reporting Frequency display as single-select picklist fields.



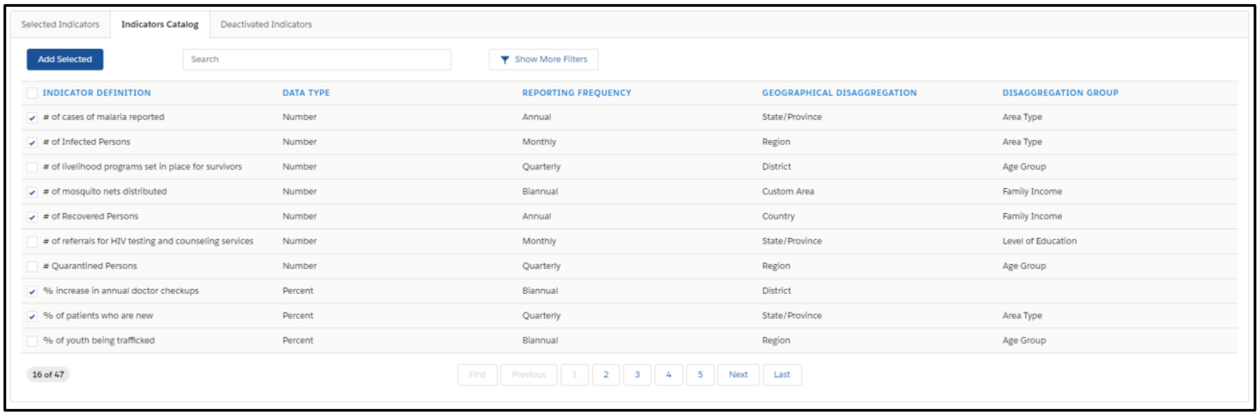
ⓘ If a numeric field is added to the search filter field set on the manageIndicators Lightning Web Component, the user cannot filter based on a number value containing more than 4 digits to the right of a decimal point. If the user enters more than 4 digits to the right of the decimal place, an error message will inform the user that an invalid number format has been entered.

Selecting and Adding Indicators from the Catalog

In the Visualforce page, only Indicators on the same page could be selected in the Indicator Catalog and added to a Project at once. This means that only 10 Indicators could, at maximum, be added at a time to a particular Project.



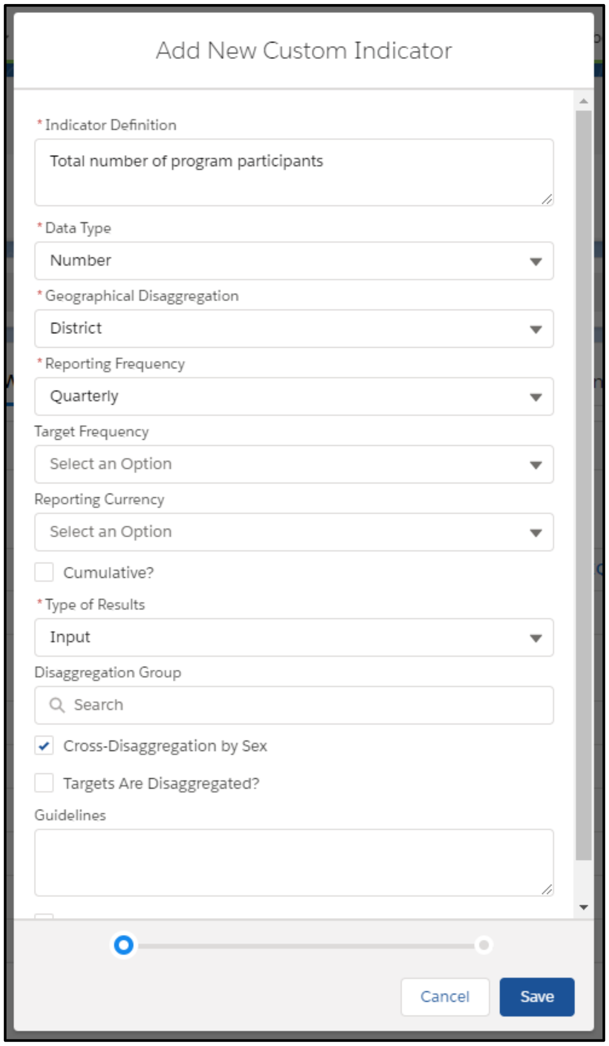
In the Lightning Web Component, Indicators can be selected across pages in the Indicator Catalog, so that more than 10 Indicators may be selected and added to a Project. A badge in the bottom left will inform the user of how many Indicators are selected from the total available.



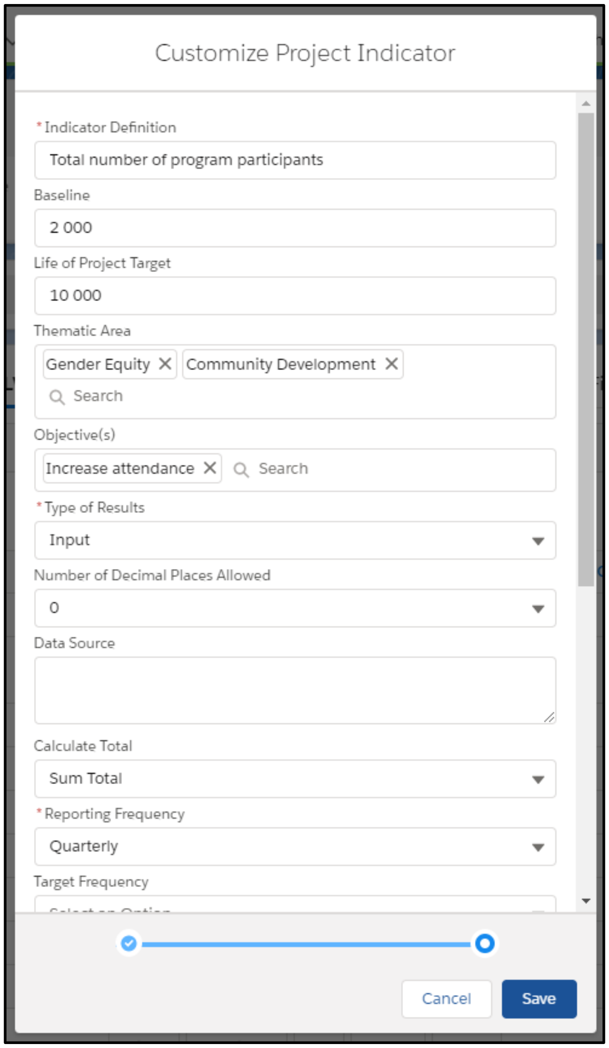
Creating Custom Indicators

In the Lightning Web Component, the Add New Indicator Popup has been split into multiple steps/popups to differentiate data that should sit at the Catalog-level (e.g. Data Type, disaggregation levels) and data that should sit at the Project-level (e.g. Baseline, Life of Project Target).

Add New Custom Indicator popup

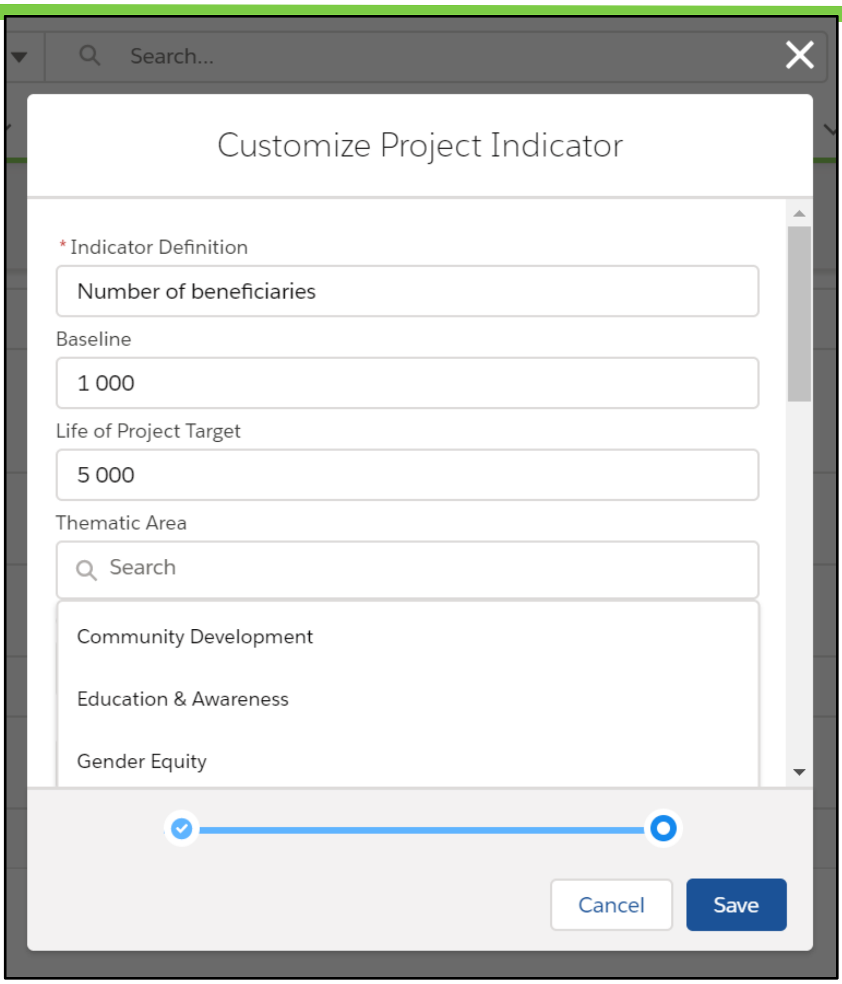


Customize Project Indicator popup

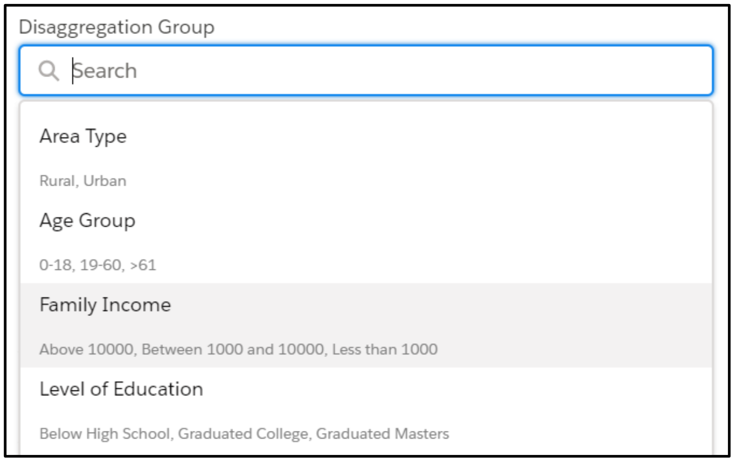


Note that within the popups themselves, there are several differences in terms of the user interface from the popups in the in Visualforce page, notably:

- Multi-select picklists (e.g. Thematic Area and Objective(s)) display as dropdown picklists with pillboxes representing selected values.

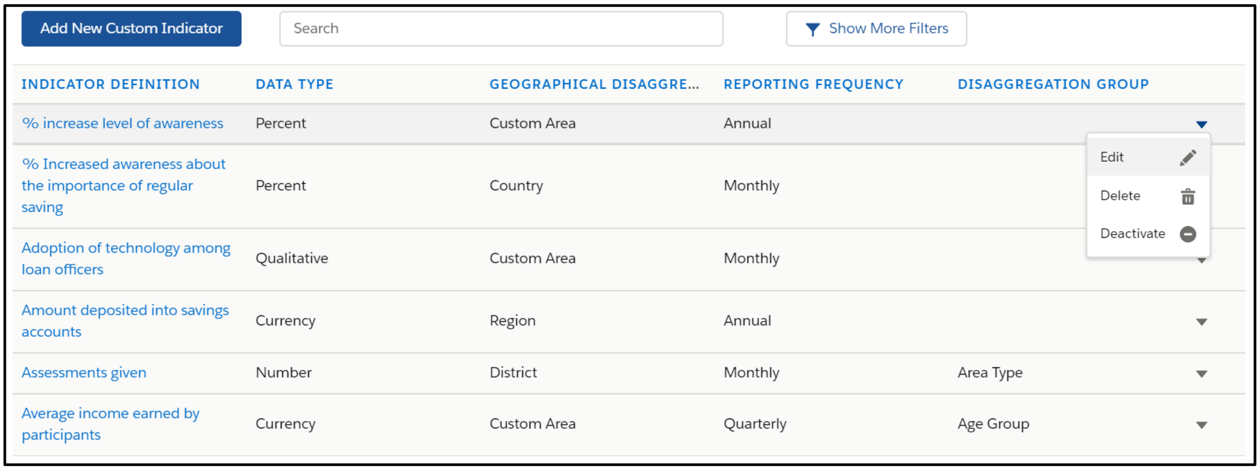


- Disaggregation values can be previewed in the Disaggregation Group picklist.



Project Indicator Action Menu

In the Lightning Web Component, actions on Project Indicators are accessed through the action menu that can be expanded on the right side of the table. The action menu currently enables users to edit, delete, or deactivate Project Indicators.

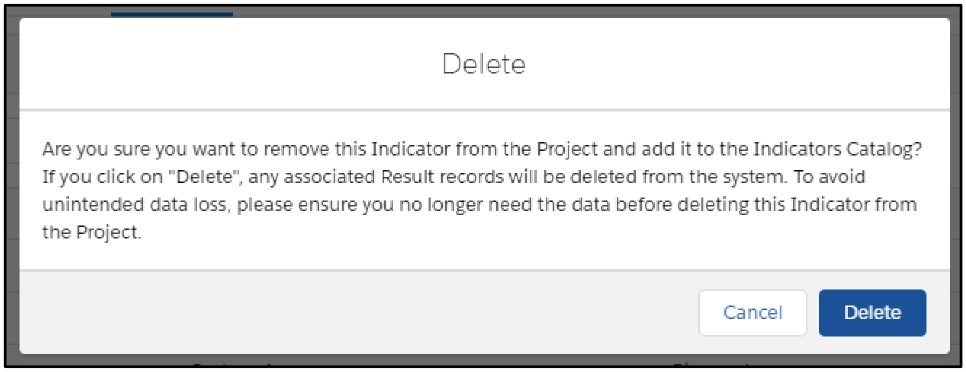


Editing Project Indicators

When the menu is expanded, the Edit button can be clicked. This will open the Customize Project Indicator popup; note that this is the same popup used when creating a custom Project Indicator for the first time.

Deleting Project Indicators

When the menu is expanded, the Delete button can be clicked. The user will then be prompted with a popup to confirm the deletion.

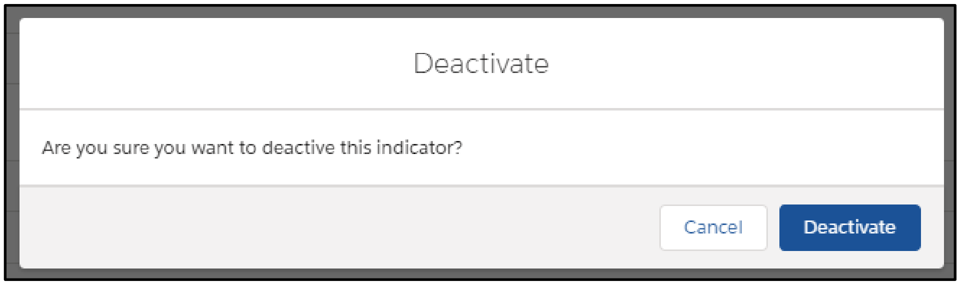


See this section for more details on what happens when the deletion is confirmed.

Deactivating Project Indicators

Instead of opening the Edit Project Indicator popup to deselect the Active checkbox to FALSE in order to deactivate a Project Indicator, now a Project Indicator can be deactivated directly from the table itself via the action menu.

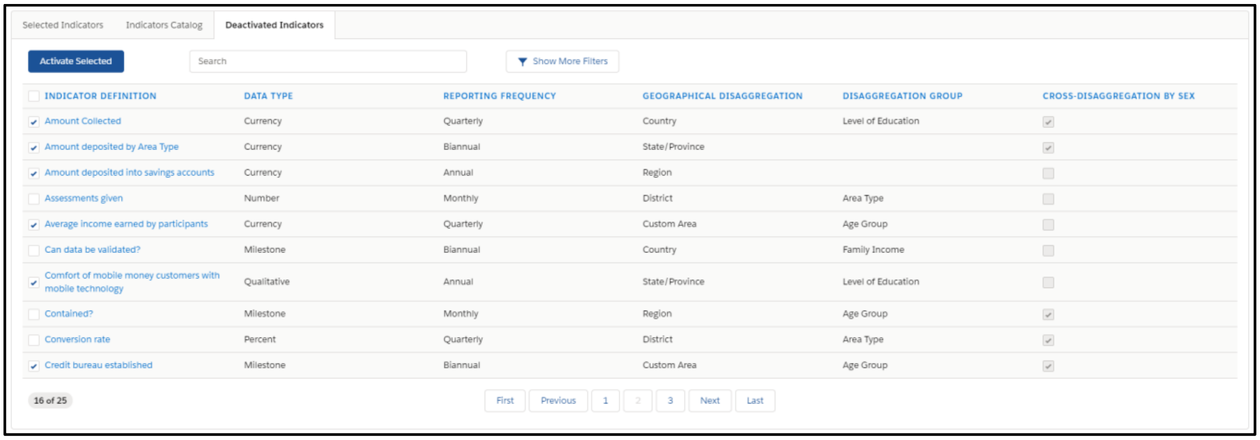
When the Deactivate action is clicked, then the user will be prompted with a popup to confirm the deactivation.



See this section for more details on what happens when the deactivation is confirmed.

Reactivating Project Indicators

For Project Indicators that have already been deactivated and display in the Deactivated Indicators tab, these can be reactivated by selecting the checkbox next to any number of Project Indicators and clicking the “Activate Selected” button. Deactivated Project Indicators can be selected across multiple pages, and a badge in the bottom left will inform the user how many total Project Indicators have been selected to reactivate.



Aggregated and Calculated Project Indicators

As of the v1.25 Delphinus release, the Manage Indicators Lightning Web Component does not support aggregated or calculated project indicators. Users are able to create project indicators of aggregated or calculated type of results, but cannot refresh or run a batch to update result records. To access the full functionality of aggregated and calculated project indicators, use Manage Indicators as a Visualforce page.

Set Targets

Overview: Set target values for project indicators based on their reporting frequency (monthly, quarterly, annual for example) and geographic level (country, district, province for example)

Entering Target Values for a Project Indicator

Capture target data for indicators in a variety of qualitative and quantitative data formats.

PROJECT INDICATOR	TOTAL	MALE	FEMALE	UNKNOWN
Increased awareness about the importance of regular saving				
Loan repayment rate	%			
Mobile money portfolio	35,123 INR	10,000 INR	25,000 INR	123 INR
Mobile money regulation passed				
Microfinance Institution	No			

The Set Targets page includes input fields into which the users can enter specific targets. By default, the first column is hardcoded to display the value printed in the ampi__Description_Translated__c field.
The format of these input fields vary based on the Project Indicator's Data Type.

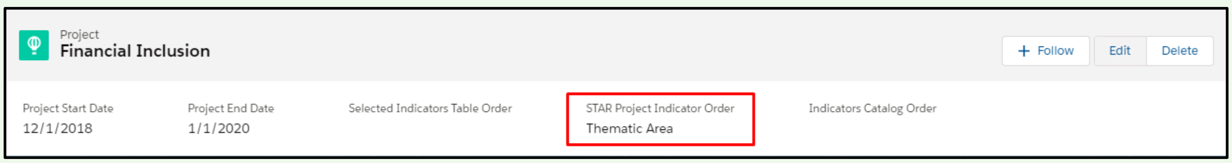
- For the three numerical data types (Currency, Number, and Percent):
  - Only numbers, ".", and "-" are accepted as inputs.
  - Up to 16 digits can be entered before the decimal place, and 0-2 digits can be entered after the decimal place depending on the number of decimal places allowed for a Project Indicator.
- If the Data Type is Currency, all input fields will display the Project Indicator's Reporting Currency value to the right of the input field.
- If the Data Type is Percent, all input fields will display a percentage sign to the right of the input field.
- If the Data Type is Milestone, all input fields will display a picklist input field with Yes and No as potential values.
- If the Data Type is Qualitative, a plus icon will display. When clicked, a pop-up will display and accept rich text input.
- Each Project Indicator row has a *Comments* icon. When clicked, a Comments pop-up window displays to track any notes/guidelines the user wants to track. These are saved to the Comments field on the Result object.
- Each Project Indicator row has an *Information* icon In the Project Indicator column. When the user hovers over the icon, the Project Indicator fields in the Set Targets Info Popover field set on the Project Indicator object display as a pop-over.

ⓘ The Logframe table displays the values saved in Target To Date and Result To Date fields if the user enters values for a percent Project Indicator (which is either associated to multiple Project Indicator Geographic Areas or has a child Disaggregated Project Indicator) from the Project Indicator record page or on from the Set Targets and Add Results pages. Additionally, if the user inputs values on the Set Targets and Add Results page against this percent Project Indicator, the previously saved values which were entered in the Target To Date and Result To Date fields through the Project Indicator record page, are not overwritten.

Ordering Project Indicators on SetTargets

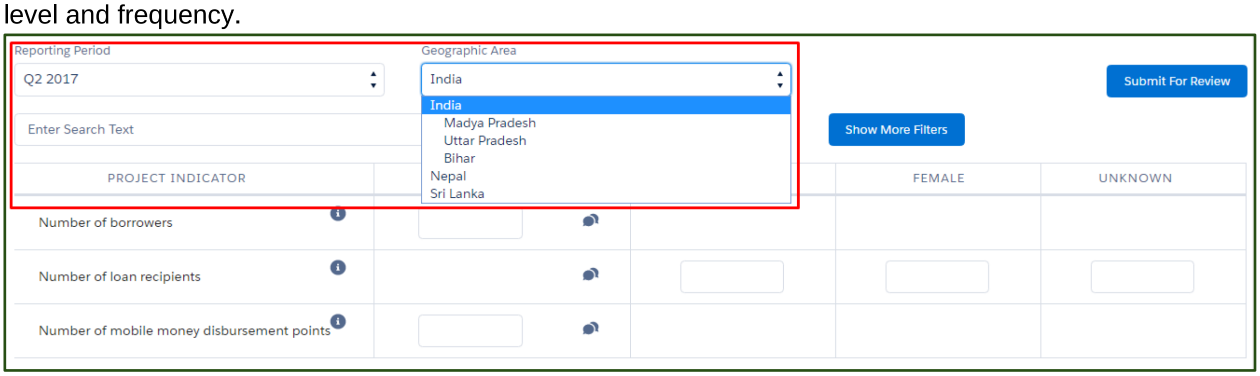
By default, all of the project indicators on the SetTargets page are listed in alphabetical order according to indicator definition. In order to specify a different order in which the project indicators will display, the field STAR_Project_Indicator_Order__c may be added to the Project page layout. It contains a list of picklist values based on the fields that are available on the Project_Indicator__c object. Choosing a value for this field will display project indicators in ascending order according to the chosen field.
For example, if a user wants project indicators on SetTargets to display according to Thematic Area, navigate to the Project page layout and choose the picklist value "Thematic Area". By default, the order of the catalog indicators are according to indicator definition.

ⓘ **Admin Note:**
Editing the field STAR_Project_Indicator_Order__c will alter the order of the project indicators both on the SetTargets and the AddResults page



Set Targets by Reporting Period and Geographic Area

Select a reporting period and geographic area to set targets for all indicators reported at that geographic level and frequency.



The Reporting Period picklist displays the Reporting_Period_Name field of all Reporting Periods which have a child Project Indicator Reporting Period record related to one of the current Project's Project Indicators. Reporting Periods are primarily sorted in ascending order by their Reporting Period End Date field.

> ⓘ **Admin Note:**
> If multiple Reporting Periods have the same Reporting Period End Date value, then those Reporting Periods are subsequently sorted in descending order by their Reporting Period Start Date.

Optional: A default Target Reporting Period can be selected for the Project which controls the Reporting Period displayed on the filter above when any user first navigates to the Set Target page.
By default, the Reporting Period displayed in the filter will be the first one recorded according to End_Date_c. In order to select a different default Target Reporting Period, the user must:

1. Ensure that the Default_Targets_RP_Id__c field is displayed on the Page Layout. To display the field, go to Object Manager>>Projects>>Page Layout.
2. Navigate to the Reporting Period to display by default and copy the 18-digit Salesforce ID found in the URL of the record.
3. Navigate to the 'Details' page of the Project and paste the 18-digit ID into Default_Targets_RP_Id__c field.

The Geographic Area picklist displays the Name field of all Geographic Areas which have a child Project Indicator Geographic Area record related to one of the current Project's Project Indicators. Geographic Areas are shown in alphabetical order. If a Geographic Area has a Parent Geographic Area, it is grouped and alphabetized under its Parent Geographic Area.

- When a value is selected in either the Reporting Period or the Geographic Area, all Project Indicators which have a child Project Indicator Reporting Period record related to the selected Reporting Period and a child Project Indicator Geographic Area record related to the selected Geographic Area will be displayed on the page.
- Target data is auto-saved for each input field after the user enters a value and clicks out from the data input cell. If no targets had been previously entered for a Project Indicator for that Geographic Area and Reporting Period, the target data is saved into a new Result record. If targets had previously been entered for a Project Indicator for that Geographic Area and Reporting Period, the target data is updated in the existing Result record.
- When a value is first entered in the Set Targets table, the Target Created Date and Target Last Modified Date custom fields on the corresponding Result record will be populated with the current

date/time. When a value is later updated, the Target Last Modified Date custom field will be re-populated with the current date/time.

- Collect target data disaggregated by custom-defined groupings such as sex, age group, type of beneficiary. For targets to be disaggregated, the checkbox field ampi__Targets_Are_Disaggregated__c must be checked on the project indicator record.

PROJECT INDICATOR	TOTAL	MALE	FEMALE	UNKNOWN
Loan amount disbursed	160,000.00 USD	45,000.00 USD	70,000.00 USD	45,000.00 USD
18-29	20,000.00 USD	5,000.00 USD	10,000.00 USD	5,000.00 USD
30-45	80,000.00 USD	20,000.00 USD	40,000.00 USD	20,000.00 USD
46-59	45,000.00 USD	15,000.00 USD	15,000.00 USD	15,000.00 USD
60+	15,000.00 USD	5,000.00 USD	5,000.00 USD	5,000.00 USD
Number of loan recipients	21,000.00	7,000.00	7,000.00	7,000.00
Percent of borrowers with 2+ loans	%	%	%	%

The number of input fields per indicator is controlled by the Cross-Disaggregation by Sex field and the presence of a child Disaggregated Project Indicator record.

- If the Project Indicator's Cross-Disaggregation by Sex checkbox is checked, input fields are displayed in the Male, Female, and Unknown column.
- If the Data Type is Percent, an additional input field is displayed in the Total column as well.
- If the Data Type is Currency or Numeric, an output field is displayed in the Total column that shows a summation of any values entered in the Female, Male and Unknown input fields.
- If the Data Type is Milestone or Qualitative, no input or output field is displayed in the Total column.
- If the Project Indicator has a child Disaggregated Project Indicator record, there will be a row of input fields for each Disaggregation Value related to the Disaggregated Project Indicator's parent Disaggregation Group.

When setting targets, users can select the level of granularity at which targets are entered for a project indicator.

Determine the Reporting Frequency of Target Data

Determine if targets are tracked at the same reporting frequency as results For example, an organization may choose to track a Project Indicator's results at a monthly frequency and disaggregated by "Age Group" and track the targets at an annual frequency with no disaggregation group. To do so, they set that specific criteria for the Project Indicator either in the Add New Custom Indicator popup or in the Edit Indicator popup. For more information, refer to the ManageIndicators section that explains how to add/edit Project Indicators, and how to adjust the fields that appear in each popup.

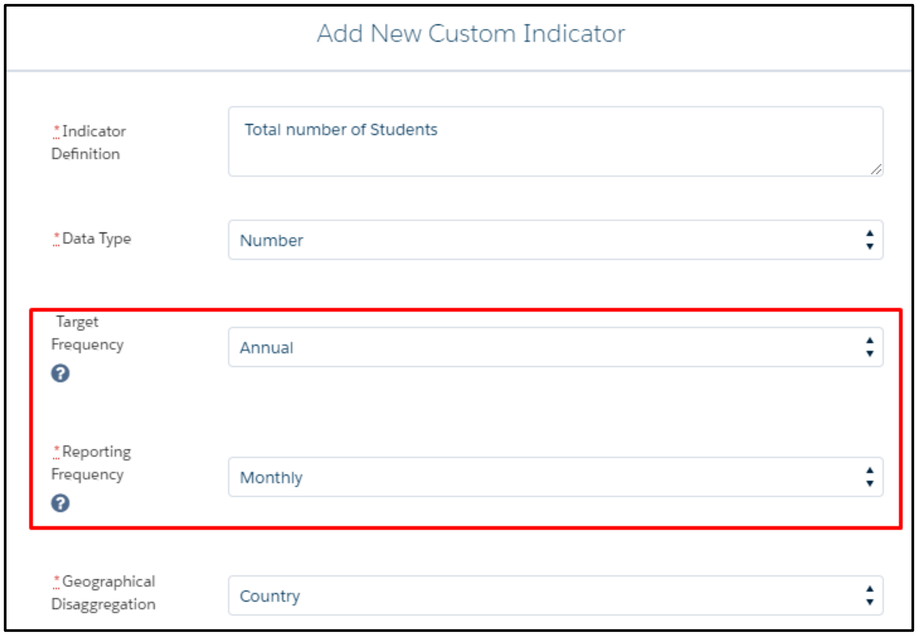
The two fields that determine target data granularity are the picklist field ampi_Target_Frequency__c and the checkbox field ampi_Targets_Are_Disaggregated__c.

Example 1	**Target & Reporting Frequencies**	**Data Entry**
User manages a project indicator with different target and result reporting frequency	ampi_Target_Frequency__c = Annual	• Targets for the selected project indicator are tracked annually. Users can enter target data for any reporting period with frequency = annual
	ampi_Reporting_Frequency__c = Monthly	• Results for the selected project indicator are tracked monthly. Users can enter results data for any reporting period with frequency = monthly. • Since targets and results are tracked with different reporting frequency, no Target data will be displayed on the AddResults page
Example 2	Reporting Frequency	Data Entry
User manages a project indicator with the same target and result reporting frequency	Target_Frequency__c = Biannual or Target_Frequency__c = NULL*	• Targets for the selected project indicator are tracked biannually. Users can enter target data for any reporting period with frequency = Biannual
	Reporting_Frequency__c = Biannual	• Results for the selected project indicator are tracked biannually. Users can enter results data for any reporting period with frequency = Biannual. • Since targets and results are tracked with the same reporting frequency, the Target data will be displayed on the AddResults page

ⓘ **Admin Note:**
As per Example 1 in the above table, it is not required for the Target_Reporting_Frequency__c to be filled in. For organizations who enter target and result data for project indicators with the same frequency, that is if these two fields are always equal, then it is not necessary for users to include the field ampi__Target_Reporting_Frequency__c in the ADD_NEW_CUSTOM_INDICATOR or EDIT_PROJECT_INDICATOR_POPUP field sets.

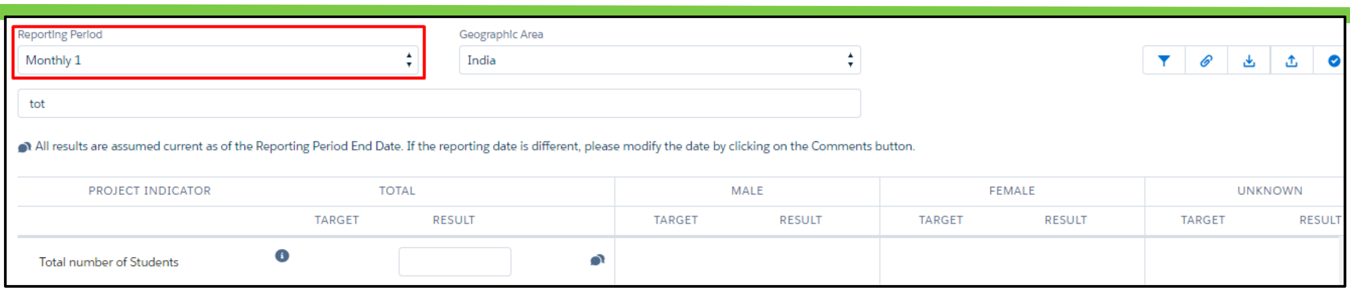
If the Target Reporting Frequency for a particular Project Indicator is different from the Reporting Frequency, then the Project Indicator can be found on the SetTargets page according to the Geographic Area and Target Reporting Frequency.

For example, a user creates a Project Indicator named “Total number of Students,” with the ampi__Target_Reporting_Frequency__c = Annual, ampi__Reporting_Frequency__c = Monthly, and Geographic_Area__c = Country.



In order to include Target values for this Project Indicator on SetTargets, a user would toggle to Geographic Area of Country and a Reporting Period of Annual (see below).

In order to include Result values for this Project Indicator on AddResults, a user would toggle to Geographic Area of Country and a Reporting Period of Monthly. (see below)



ⓘ **Admin Note:**
Because the frequency of reporting targets and results is different, the targets for this Project Indicator will not appear on the AddResults page since the reporting periods don't match for both sets of data.

Additionally, when users set the target frequency and result frequency differently and then change one of the frequencies, the result records for that project indicator become orphaned because the Project Indicator Reporting Period will be deleted.

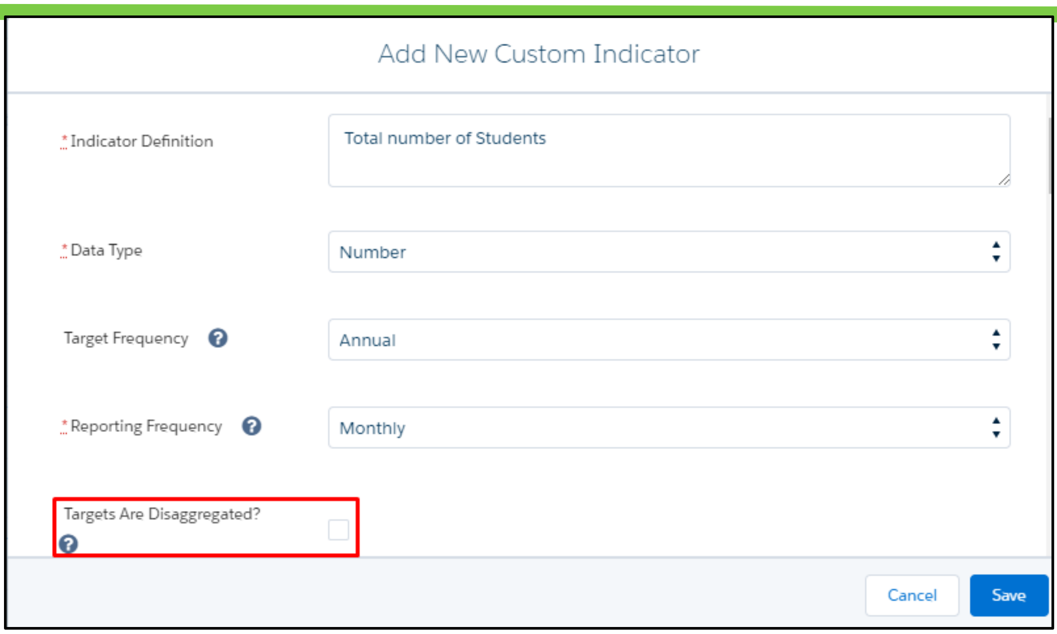
Determine if Target data is Disaggregated

When setting targets, users can determine the granularity at which a target is set. For example, if the project indicator is 'Total number of Students', a user may determine if targets should be set for:

1. Total number of Students
2. Total number of Students by any disaggregation group (for example, by Age)
3. Total number of Students by sex (male, female, unknown)
4. Total number of Students by any disaggregation group and by sex

For example, the same Project Indicator, "Total number of Students" is disaggregated by age group and cross-disaggregated by sex, the Target_Reporting_Frequency__c = Annual, the Reporting_Frequency__c = Monthly, and the field Targets_are_disaggregated__c = FALSE.

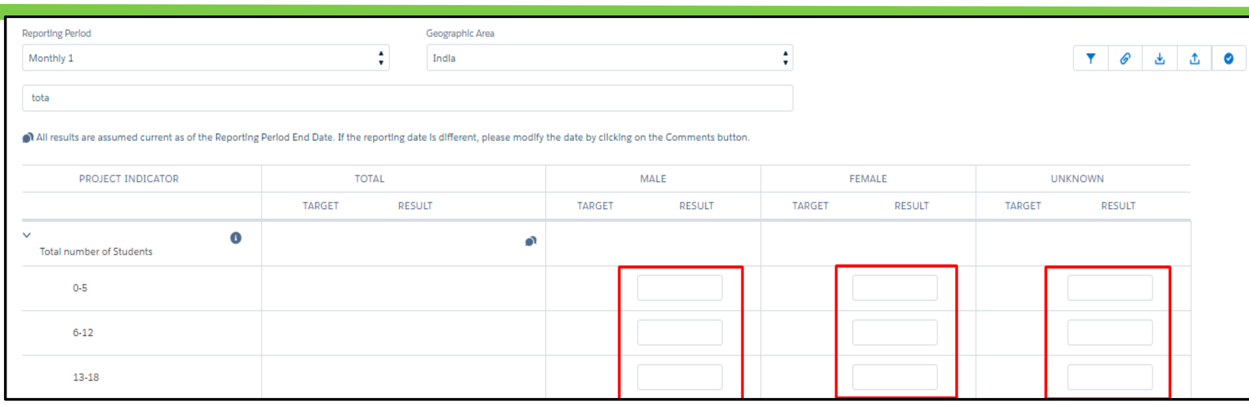
ⓘ **Admin Note:**
Historical data remains when users change the field Targets_Are_Disaggregated__c from TRUE to FALSE. For example, if the results and targets for a project indicator are disaggregated by group (Targets_Are_Disaggregated__c = TRUE) and targets have already been included, then the targets input for the disaggregation values remain if Targets_Are_Disaggregated__c is changed to FALSE.



In order to include Target values for this Project Indicator on SetTargets, a user would toggle to Geographic Area of Country and a Reporting Period of Annual and would be able to include values. Because Targets_Are_Disaggregated__c = FALSE, the targets for this Project Indicator are being set with no level of disaggregation which is why there is only one input field for this project indicator.

In order to include Result values for this Project Indicator on AddResults, a user would toggle to Geographic Area of Country and a Reporting Period of Monthly and add result values. Because Targets_Are_Disaggregated__c = FALSE, there is only one target value for this Project Indicator that is displayed on the AddResults page. The AddResults page will include either input or output fields (depending on the value in the field ampi__Type_of_Results__c. When this field is equal to 'Input' then the field(s) on AddResults are input fields. When ampi__Type_of_Results__c = Aggregated or Calculated, then the field(s) on AddResults are output fields) and these fields will display according to the level of disaggregation specified.

In the example of "Total number of Students," the Type_of_Results__c = Input, with both a disaggregation group of age group and cross-disaggregation by sex, which is why in the visual below, there are 6 input fields for a user to include result values.



Display Total values for Disaggregated Indicators

The field Calculate_Total__c allows users to choose whether an output (total value) field is displayed in the Total column/row for a Project Indicator where Data_Type__c = Number, Currency, or Percent on the SetTargets page.

Display total value

1. When a Project Indicator has Data_Type__c = Number or Currency, and Calculate_Total__c = Sum Total, the Project Indicator will display total output values on SetTargets when the project indicator is:

Cross-disaggregated by sex

Disaggregated by group

Cross-disaggregated by sex and disaggregated by group

# of referrals for HIV testing and counseling services	100	30	39	31
0-5	55	18	23	14
6 - 11	19	2	8	9
11 - 18	26	10	8	8

2. When a Project Indicator has Data_Type__c = Percent, and Calculate_Total__c = Sum Total, the Project Indicator will display total values on SetTargets is either:

Cross-disaggregated by sex: there are 4 input fields displayed - 1 input field for Total, Male, Female, and Unknown, respectively. Therefore, the field Calculate_Total__c *does not* impact this type of Project Indicator.

Disaggregated by group

% of participants	100 %	58 %
0-5	7 %	28 %
6 - 11	33 %	19 %
11 - 18	60 %	11 %

Cross-disaggregated by sex and disaggregated by group

% of participants	100 %	80 %	80 %	23 %
0-5	7 %	42 %	45 %	13 %
6 - 11	33 %	14 %	16 %	4 %
11 - 18	60 %	24 %	19 %	6 %

ⓘ **Admin Note:**
For quantitative Project Indicators with no level of disaggregation, there is only 1 input field, and the Calculate_Total__c does not impact the display of input fields for these Project Indicators.

Do not display total value

1. When a Project Indicator has Data_Type__c = Number or Currency, and Calculate_Total__c = Don't Sum Total, the Project Indicator will *not* display total values on SetTargets when the Project Indicator is:

Cross-disaggregated by sex

PROJECT INDICATOR	TOTAL	MALE	FEMALE	UNKNOWN
# of referrals for HIV testing and counseling services		200	1,000	300

Disaggregated by group

PROJECT INDICATOR	TOTAL
# of referrals for HIV testing and counseling services	
0-5	78
6-12	65
13-18	7

Cross-disaggregated by sex and disaggregated by group

# of referrals for HIV testing and counseling services				
0-5		16	8	2
6 - 11		13	2	1
11 - 18		44	12	2

2. When a Project Indicator has Data_Type__c = Percent, and Calculate_Total__c = Don't Sum Total, the Project Indicator will *not* display total values on SetTargets when the Project Indicator is:

Disaggregated by group

% of participants	
0-5	7 %
6 - 11	33 %
11 - 18	60 %

Cross-disaggregated by sex and disaggregated by group

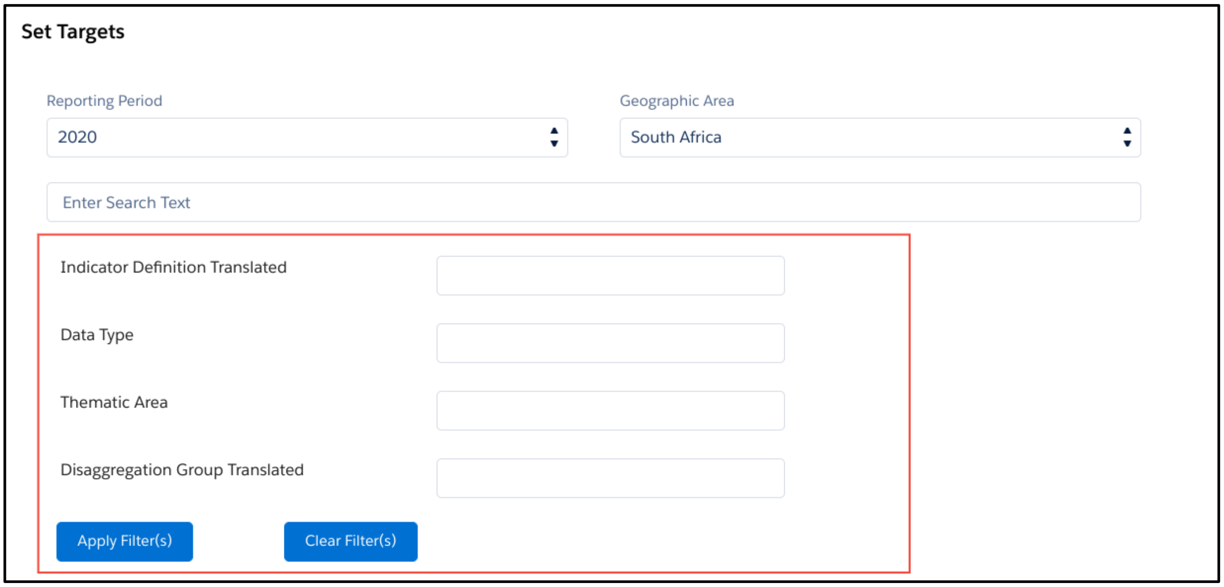
Reporting Period: Monthly 1
Geographic Area: Colaba
Enter Search Text

PROJECT INDICATOR	TOTAL	MALE	FEMALE	UNKNOWN
% of participants				
0-5	78 %	87 %	9 %	4 %
6-12	55 %	89 %	10 %	1 %
13-18	81 %	75 %	20 %	5 %

ⓘ **Admin Note:**
Additional and custom fields for search filters may be added to the Set Targets table by navigating to the ST_SEARCH_FILTERS field set on Project_Indicator__c object.

Use search bar and filters to set targets for specific types of indicators

1. As text is entered into the QuickSearch bar, the Project Indicators displayed on the page are filtered down by those whose indicators contain the input text.
2. The project indicators field set can be configured to filter by specific, custom or standard field types. The following fields are available out of the box with Amp Impact:
    - Indicator Definition
    - Data Type
    - Thematic Area
    - Disaggregation Group
    - For further customization, please speak to your system admin and refer to the Installation Guide.



ⓘ **Note:**
Please note that when Quick Search and Filters are used together, the table displays only those results which match both criteria: the text in the quick search bar and specified filter criteria.

3. When “Clear Filters” is clicked, the filters are all cleared and the table reverts to display all Indicator records.

Validation Ranges and Live Error Checking for target values

Set up validation ranges for indicators to facilitate better data quality.

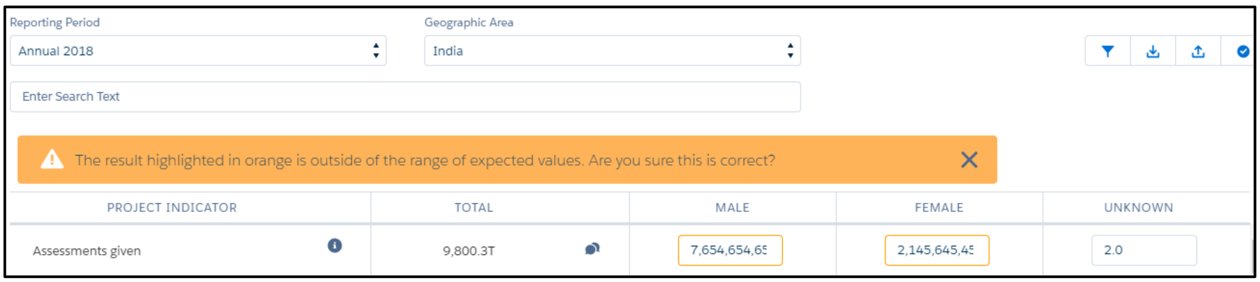
Through the Amp Impact Admin custom setting (refer to Installation guide for access and set-up details), an organization can choose to enable/disable the Validation Ranges feature. This feature allows users to indicate a minimum and maximum value for indicators with data type = number, currency, percent and be able to live error-check if the values entered in the input fields are within the range of expected values.

For an organization to utilize this feature, the fields Validation Range Minimum and Validation Range Maximum must be populated on Project Indicators.

To ensure that these fields are available when creating an Indicator, an organization can add them to the Add New Custom Indicator pop-up by adding them to the ADD_NEW_INDICATOR_POPUP field set on the Indicator object.

To ensure that these fields are available when editing a Project Indicator, an organization can add them to the Edit Project Indicator pop-up by adding them to the EDIT_PROJECT_INDICATOR_POPUP field set on the Project Indicator object.

- Each project indicator can have its own minimum and maximum value and the fields can be added to the relevant field sets on the Indicator__c and Project_Indicator__c objects.
- If the Project Indicator has a Validation Range Minimum value and the user enters a value less than the Validation Range Minimum, a warning message appears at the top of the page, but the value is still saved.



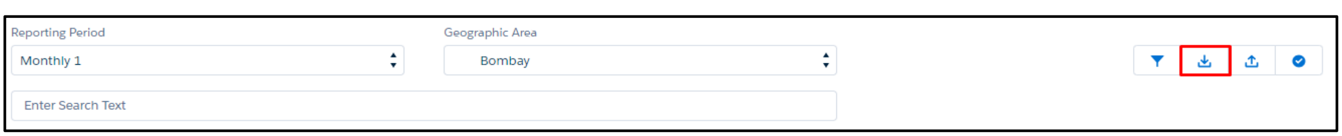
- If the Project Indicator has a Validation Range Maximum value and the user enters a value greater than the Validation Range Maximum, a warning message appears at the top of the page, but the value is still saved.
- Users can click on the “x” next to the warning message when it first appears and continue entering target values. The message will not reappear if another value is entered outside the expected range once the warning message has been closed by the user. However, the warning message will re-appear if the user navigates away from the Set Targets page and then returns to it.

Download Targets data to an Excel file

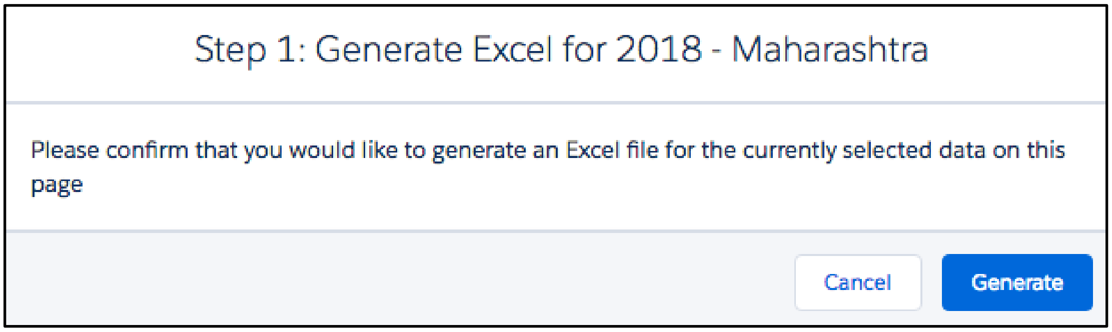
ⓘ Admin Note: The ability for users to access the download excel button can be controlled through the Set Targets custom setting (please refer to Installation guide for access and set-up details).

a. To download targets for Project Indicators for a specific reporting period and geographic area, the user clicks the “Download” button.

ⓘ Note: Users can decide which Targets are downloaded by applying Filters (using the Filter button and/or the Search text bar). On open, the excel file will contain only targets that match the filters applied at the time of download.



b. OnClick of the Download button, a pop-up opens. The Generate pop-up will ask the user to confirm generating the excel sheet for the particular reporting period and geographic area selected. In this pop-up, the user can either click ‘Generate’ or ‘Cancel’.
    i. If there is no project indicator linked to a geographic area and reporting period, then selecting ‘Generate’ will prompt an error message.
    ii. Selecting ‘Cancel’ will exit from the ‘Generate’ pop-up. The page will remain on the SetTargets page.

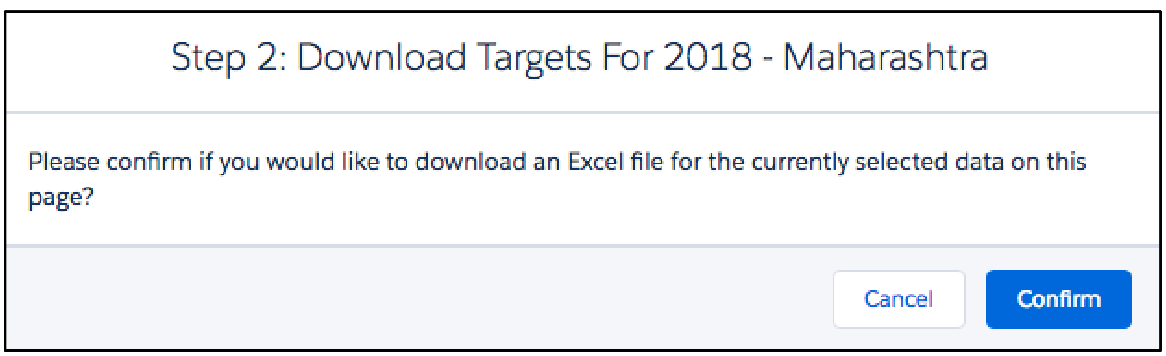


ⓘ Admin Note: Using custom labels, the user may edit/customize the following in the ‘Generate’ pop-up: Generate_Excel_Text,Generate_Excel_Button, Generate_Excel_Header.

c. If there is at least one project indicator linked to a geographic area and reporting period, then selecting ‘Generate’ will prompt a Confirm pop-up.

ⓘ Admin Note: Using custom labels, the user may edit the following in the Confirm pop-up: Download_Targets_Header.

d. The Confirm pop-up will ask the user to confirm the download of the excel sheet for the particular reporting period and geographic area selected. In this pop-up, users can either click ‘Confirm’ or ‘Cancel’.
    i. Selecting ‘Cancel’ will close the pop-up and the user will remain on the SetTargets page.
    ii. Selecting ‘Confirm’ will prompt the download of the excel file onto the SetTargets page.



e. Once ‘Confirm’ has been selected, the file will download. On opening of the file, 2 tabs will be displayed
    i. The first tab will be labeled as, “Instructions’ - this tab will outline how to enter data in a compatible format to upload the document into the SetTargets page
    ii. The second tab will change dynamically to reflect the reporting period and geographic area, and will be formatted as such - ‘[Reporting Period label] - [Geographic Area name]’. Below

the header, the date and time of download, and the name of the user who downloaded the file will be displayed.

f. The downloaded targets excel file will all be stored as ContentVersion files under the Files related list on the relevant Reporting Period. If a user downloads an excel file multiple times for the same geographic area and reporting period, these ContentVersion files are updated to reflect the last download date, and the owner of the ContentVersion record is updated to the user who last downloaded the targets. The user may access all of the versions that have been downloaded by selecting 'View previous versions'.

Upload Targets data from an Excel file

> ⓘ Admin Note: The ability for users to access the download excel button can be controlled through the Set Targets custom setting (please refer to Installation guide for access and set-up details).

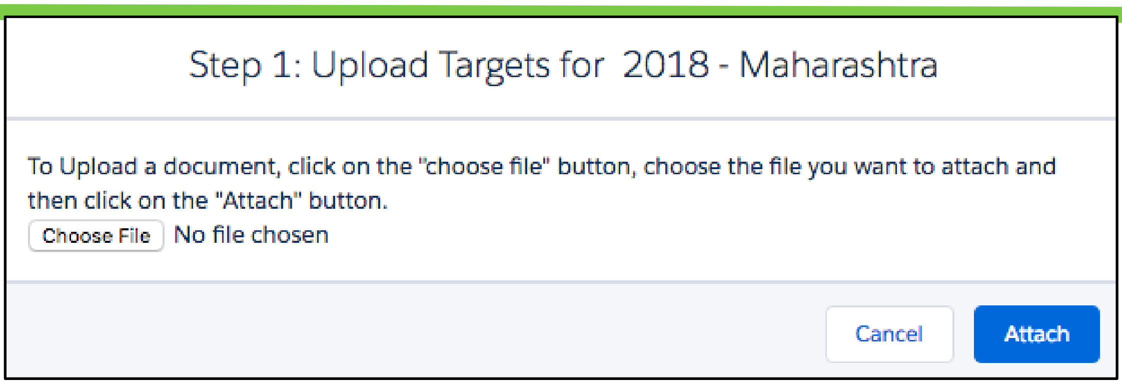
a. Once the targets have been downloaded for a given reporting period and geographic area, the user can open the downloaded excel to view and add targets to upload (See the section above on downloading targets as an excel file for details),

b. To upload the targets, data may be added to the 2nd tab of the Excel spreadsheet. The following may be edited:
   i. The number of tabs
   ii. The values in the input cells which are indicated by the blue background
   iii. The cells in the Comments column corresponding to each project indicator
      1. Currently, upserted comments via Excel upload will not reflect in the Indicators table. This limitation will be addressed in a future release.
      2. Comments added via Excel will not upload if the corresponding project indicator has no target or result value. For example, if a user uploads a comment to a project indicator that has no target or result input, then the comment will not be upserted. If the project indicator does have set targets or results, then the comment will be upserted.

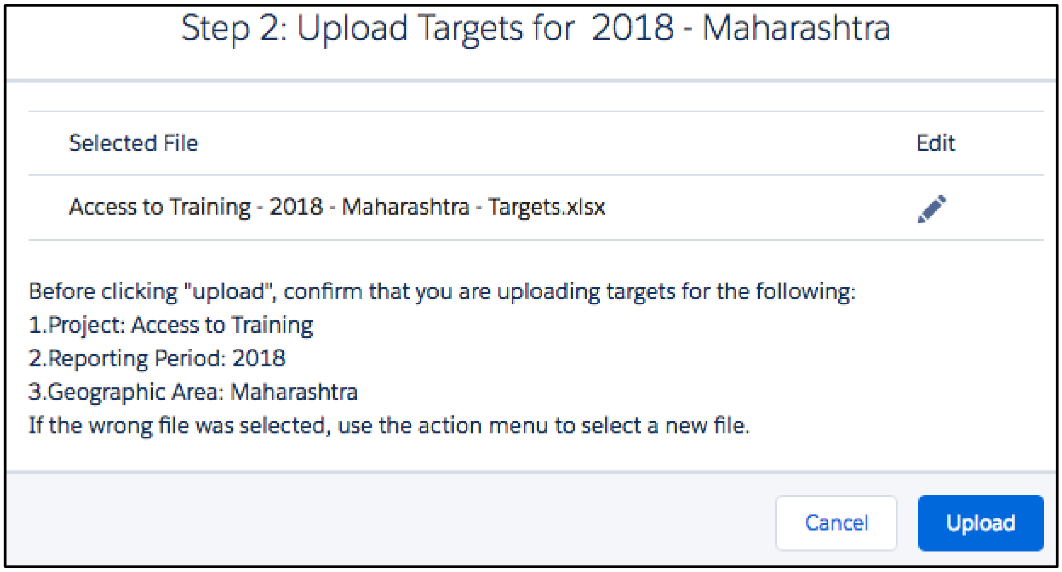
c. The following portions of the excel sheet may not be edited in order to ensure they are compatible with the Upload feature
   i. The header text on the tab with the downloaded data
   ii. The names of the column headers in the downloaded tab
   iii. The name of the downloaded tab
   iv. The existence of one tab with the Reporting Period and Geographic Area as the label

d. Once data has been entered into the excel sheet, the user must navigate to the SetTargets page and click the Upload button in the top right corner of the screen

   Step 1- Selecting the Upload button will prompt a popup to allow the user to attach the file to be uploaded for that particular geographic area and reporting period
   i. The user may click Cancel at any time and return to the SetTargets page, with no records updated
   ii. When choosing a file, ensure that the file type is 'xlsx'. Clicking "Attach" will prompt the next popup. At this step, an error message will appear onclick of "Attach" if the uploaded document is not in the .xlsx format, in which case, the user must revisit the document to be uploaded and edit it to make it compatible.

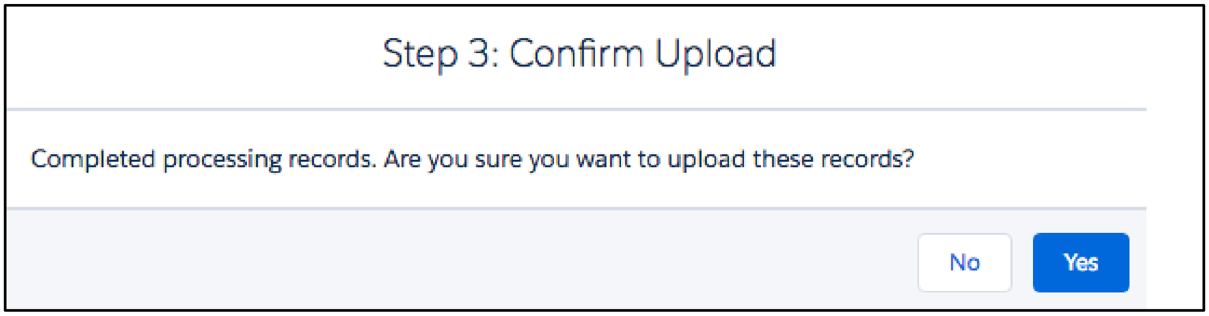


Step 2- Once the upload popup appears, click on the “Upload” button. This popup will confirm the reporting period, geographic area, and project name.

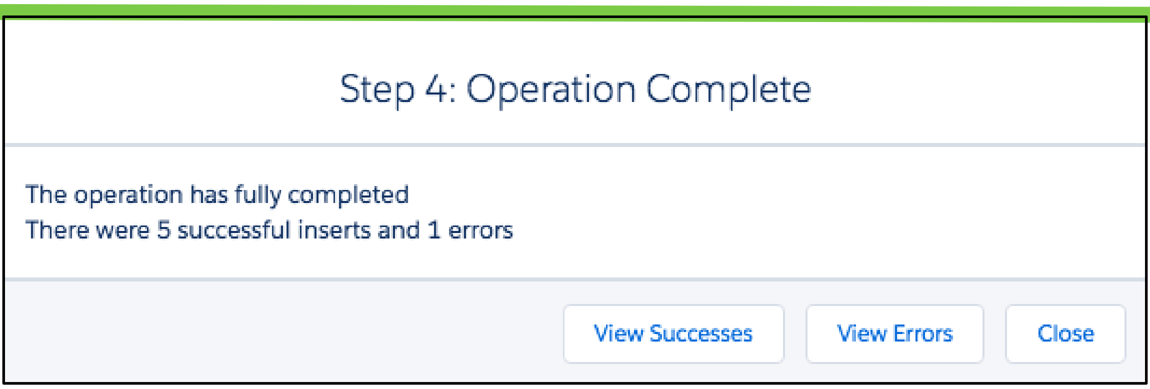


Step 3- Once the upload is complete, a “Confirm Upload” popup will appear. The popup will ask the user to confirm that the records uploaded should update the targets for the chosen reporting period and geographic area

i. Selecting “No” will cancel out of the popup, with no records updated
ii. Selecting “Yes” will confirm the upload and the records will update



Step 4- Once the user has selected “Yes,” there will be a popup that reads “Operation Complete,” with the number of successfully updated records and the number of errors that occurred.



On this popup, there are two buttons:

- “View Successes” - selecting this shows the user the successful uploads. Clicking on View Successes button will download an excel file with all of the indicators that successfully uploaded. This file will download on the SetTargets page and a record on ContentVersion will also be created.
    - If there were no successes, the View Successes button will not display in Step 4
    - The uploaded success log excel file will all be stored as ContentVersion files under the Files related list on the relevant Reporting Period. If a user uploads an excel file multiple times for the same geographic area and reporting period, these ContentVersion files are updated to reflect the last upload date, and the owner of the ContentVersion record is updated to the user who last uploaded the targets. The user may access all of the versions that have been uploaded by selecting ‘View previous versions’.
    - The rows in the downloaded success log will be ordered by alphabetically ascending Indicator definitions.
- “View Errors” - selecting this shows the user an error log of records that could not be successfully uploaded and the associated errors. Clicking on View Errors button will download an excel file with all of the indicators that were unable to be uploaded with a column explaining what the error was. This file will download on the SetTargets pages and a record on ContentVersion will also be created.
    - If no errors occurred, then the View Errors button will not display in Step 4
    - The uploaded error log excel file will all be stored as ContentVersion files under the Files related list on the relevant Reporting Period. If a user uploads an excel file multiple times for the same geographic area and reporting period, and if some errors are generated on upload, these ContentVersion files are updated to reflect the last upload date, and the owner of the ContentVersion record is updated to the user who last uploaded the targets. The user may access all of the versions that have been uploaded by selecting ‘View previous versions’.
    - The rows in the downloaded error log will be ordered by alphabetically ascending Indicator definitions.

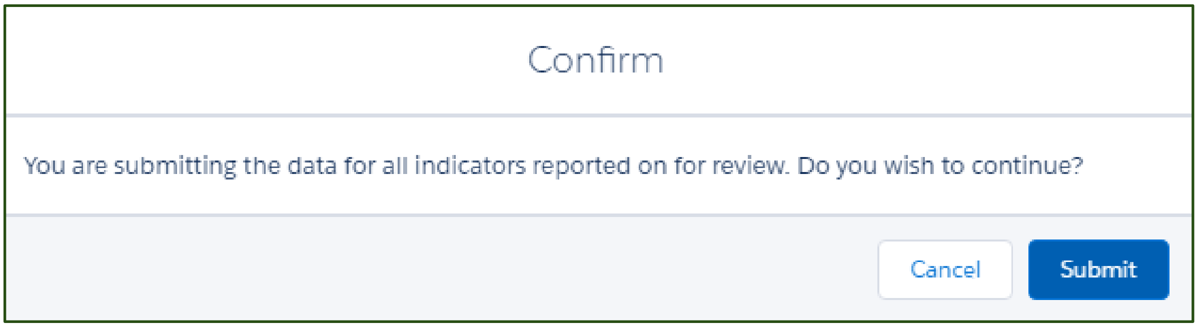
e. The user can download the success/error logs and then close the pop-up. This will automatically refresh the SetTargets page and display the newly updated records.
f. The uploaded targets excel file will all be stored as ContentVersion files under the Files related list on the relevant Reporting Period. If a user uploads an excel file multiple times for the same geographic area and reporting period, these ContentVersion files are updated to reflect the last

upload date, and the owner of the ContentVersion record is updated to the user who last uploaded the targets. The user may access all of the versions that have been uploaded by selecting 'View previous versions'.

Submit Targets for review

Through the *Amp Impact Admin* custom setting (refer to *Installation* guide for access and set-up details), an organization can choose to enable/disable the Submit Targets feature.

Once data entry is complete for the targets for a given Reporting Period, the user clicks the "Submit" button. The text in the pop-up window that displays can be edited by users in the Confirm_Submit_Review custom label.



Customize a review process for setting targets to garner approval from relevant team-members

1. Users are able to submit targets for multiple Reporting_Period__c records, if applicable. For example, a user may need to submit targets for Chile for quarter 2 and the semi-annual report. They can go to the relevant reporting periods, enter data and then submit.
2. Users have the option to create workflows that trigger certain actions on the click of the Submit button. For example, clicking on the Submit button can set a specific Status and generate an email notification. OnClick of "Submit' on the SetTargets page, Target_Status__c = Submitted, thus making the SetTargets page uneditable. To make the page uneditable when any other status is selected, the The Target_Status__c field can also be configured through a workflow to edit the Targets_Locked__c field which can lock the target input fields for that Reporting Period and Geographic Area un-editable so that users can no longer make any changes to the data entered.
3. On the SetTargets page, the results display as output fields when
    a. The field Target_Locked__c = TRUE for a reporting period, OR
    b. Target_Status__c = Submitted
4. When the results appear as output fields, the user cannot edit the targets entered. Project Indicators with Data Type = Qualitative will display a *View* icon.

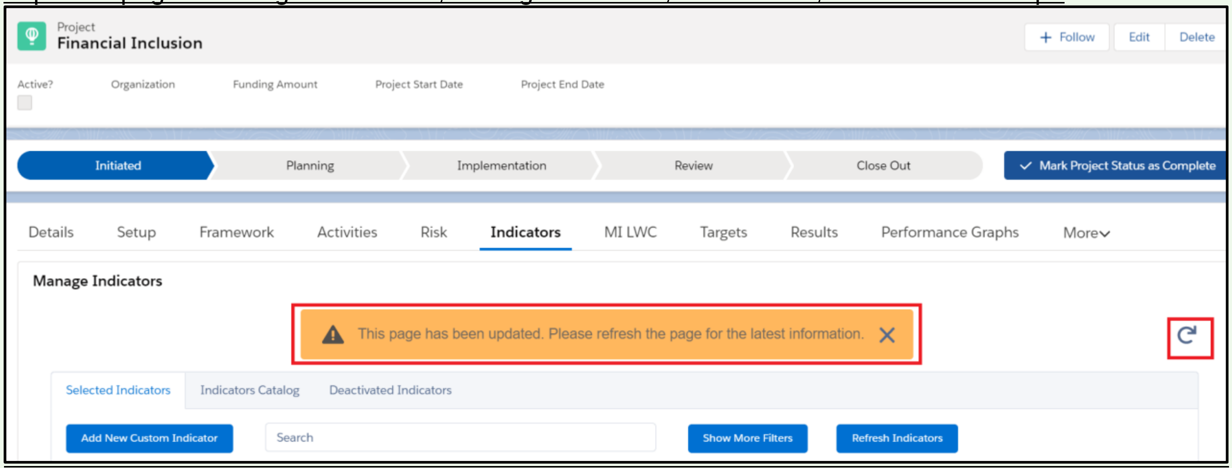
5. Once the user clicks the *Submit* button, the *Upload* button is greyed out to prevent any additional targets from being uploaded.

ⓘ **Admin Note:**

If edits are made on the SetTargets page, such as a target value or a comment is created, deleted, or edited, the following Visualforce pages will display a Refresh icon and a warning message alerting the user that the data on that page is not updated with the most accurate data.

Clicking on the Refresh icon will reload the current page to display on the current page any changes made on SetTargets.

Impacted pages: ManageFramework, ManageIndicators, AddResults, Performance Graph



Add Results

Overview: Track result data for project indicators based on their reporting frequency (monthly, quarterly, annual for example) and geographic level (country, district, province for example).

Creation of Result records

When Targets are set for a project indicator, result records are created.
If a project indicator's reporting frequency is the same as the target frequency:

- Upon entering Result values, any result record(s) with Target values for that project indicator will update to include the Result values.
- If no Targets have been input, then upon entering Results, new result record(s) will be created for that project indicator. If Targets are set after Results are entered, then the already created result record(s) will update to reflect the Target values.

If a project indicator's target frequency is not the same as the reporting frequency:

- Upon entering Result values, existing result records with Target values will not update. Instead, new result record(s) will be created.

- If Results are added before Targets are set, then result record(s) will be created for that project indicator and different result record(s) will be created upon setting Targets.

View Targets on the AddResults page

Custom Setting

Through the *Add Results* custom setting (refer to *Installation Guide* for access and set-up details), an organization can enable/disable the display of Targets on the AddResults page.

With the ability to set Target Reporting Frequencies and disaggregation levels differently from Result Reporting Frequencies (For more on target setting, refer to the SetTargets section), the AddResults page displays accordingly:

Different Target and Reporting Frequencies

If the Target Frequency for a Project Indicator is different than the Reporting frequency (ie, Target_Frequecy__c does not equal Reporting_Frequency__c), then the Targets for this Project Indicator will not display on the AddResults page:

PROJECT INDICATOR	TOTAL	
	TARGET	RESULT
# of patients treated		177
20-30		78
30-40		99

Same Reporting Frequency

If the Target Frequency is the same as the Reporting Frequency, and targets and results have the same level of disaggregation, then the Add Results page includes a second column that displays Targets next to the column that displays input fields where users enter Results. This allows for easy comparison between Targets and Results.

PROJECT INDICATOR	TOTAL	
	TARGET	RESULT
# of patients treated	500	177
20-30	200	78
30-40	300	99

Same Reporting Frequency and Different Disaggregation

If the Target Frequency is the same as the Reporting Frequency, and targets and results have different levels of disaggregation, then the Targets for this Project Indicator will display on the AddResults page as follows:

PROJECT INDICATOR	TOTAL	
	TARGET	RESULT
# of patients treated	500	177
1		78
2		99

Entering Results Values for a Project Indicator

The Add Results page includes input fields into which the users can enter specific targets. By default, the first column is hardcoded to display the value printed in the ampi__Description_Translated__c field. The format of these input fields vary based on the Project Indicator’s Data Type.

- For the three numerical data types (Currency, Number, and Percent):
- Only numbers, “.”, and “-” are accepted as inputs.
- Up to 16 digits can be entered before the decimal place, and 0-2 digits can be entered after the decimal place depending on the number of decimal places allowed for a Project Indicator.
- If the Data Type is Currency, all input fields will display the Project Indicator’s Reporting Currency value to the right of the input field.
- If the Data Type is Percent, all input fields will display a percentage sign to the right of the input field.
- If the Data Type is Milestone, all input fields will display a picklist input field with ‘Yes’ and ‘No’ as potential values.
- If the Data Type is Qualitative, a plus icon will display. When clicked, a pop-up will display and accept rich text input.

ⓘ **Admin Note:**
For Project Indicators with Type_of_Result__c = Aggregated or Type_of_Result__c = Calculated, input fields will be displayed on the SetTargets page and output fields will be displayed on the AddResults page. Review the Calculated and Aggregated Indicators user guides for more information.

- Each Project Indicator row has a *Comments* icon. When clicked, a Comments pop-up window displays to track any notes/guidelines the user wants to track. These are saved to the Comments field on the Result object.
- The popup also includes a “Results Current As Of” date field that displays the date depending on the user’s locale. This field can be used optionally to track the date when the results data was collected and is current as of.

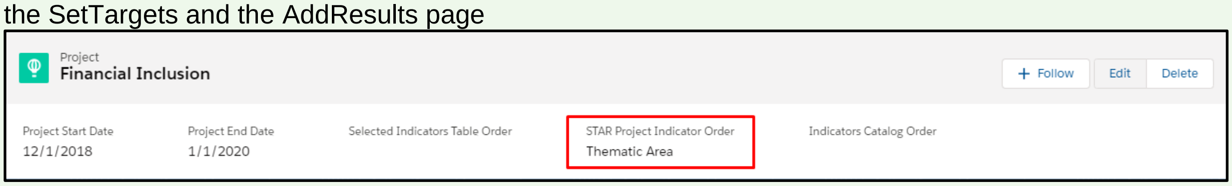
- Each Project Indicator row has an *Information* icon In the Project Indicator column. When the user hovers over the icon, the Project Indicator fields in the Set Targets Info Popover field set on the Project Indicator object display as a pop-over.

Ordering Project Indicators on AddResults

By default, all of the project indicators on the AddResults page are listed in alphabetical order according to indicator definition. In order to specify a different order in which the project indicators will display, the field STAR_Project_Indicator_Order__c may be added to the Project page layout. It contains a list of picklist values based on the fields that are available on the Project_Indicator__c object. Choosing a value for this field will display selected indicators in ascending order according to the chosen field.

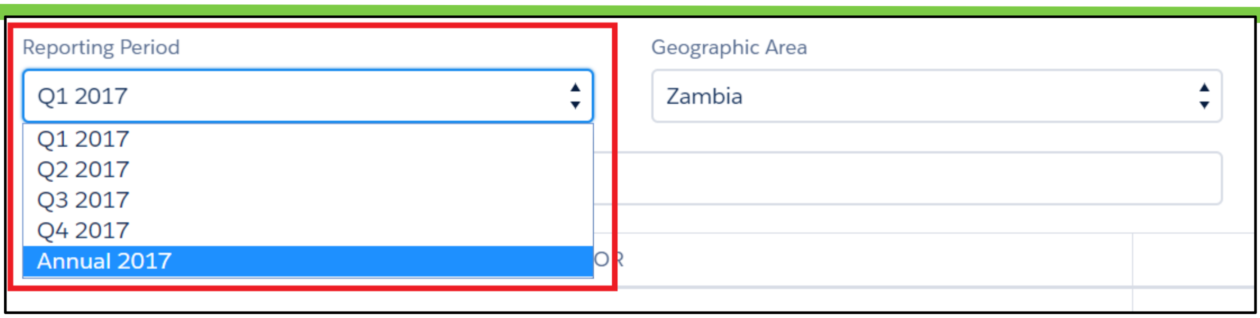
For example, if a user wants the project indicators on AddResults to display according to Thematic Area, navigate to the Project page layout and choose the picklist value “Thematic Area” for the field STAR_Project_Indicator_Order__c. Navigating back to AddResults, users will see the project indicators sorted according to Thematic Area. By default, the order of the catalog indicators are according to indicator definition.

ⓘ **Admin Note:**
Editing the field STAR_Project_Indicator_Order__c will alter the order of the project indicators both on the SetTargets and the AddResults page



Add Results by Reporting Period and Geographic Area

The Reporting Period picklist displays the Reporting Period Name field of all Reporting Periods which have a child Project Indicator Reporting Period record related to one of the current Project’s Project Indicators. Reporting Periods are primarily sorted shown in ascending order by their Reporting Period End Start Date field. If multiple Reporting Periods have the same Reporting Period End Date value, then those Reporting Periods are subsequently sorted in descending order by their Reporting Period Start Date.



Optional: A default Results Reporting Period can be selected for the Project which controls the Reporting Period displayed on the filter above when any user first navigates to the Add Results page.
By default, the Reporting Period displayed in the filter will be the first one recorded according to End_Date_c. In order to select a different default Result Reporting Period, the user must:

1. Ensure that the Default_Targets_RP_Id__c field is displayed on the Page Layout. To display the field, go to Object Manager>>Projects>>Page Layout.
2. Navigate to the Reporting Period to display by default and copy the 18-digit Salesforce ID found in the URL of the record.
3. Navigate to the 'Details' page of the Project and paste the 18-digit ID into Default_Results_RP_Id__c field.

The Geographic Area picklist displays the Name field of all Geographic Areas which have a child Project Indicator Geographic Area record related to one of the current Project's Project Indicators. Geographic Areas are shown in alphabetical order. If a Geographic Area has a Parent Geographic Area, it is grouped and alphabetized under its Parent Geographic Area.

- When a value is selected in either the Reporting Period or the Geographic Area, all Project Indicators which have a child Project Indicator Reporting Period record related to the selected Reporting Period and a child Project Indicator Geographic Area record related to the selected Geographic Area will be displayed on the page.
- When a value is first entered in the Add Results table, the Result Created Date and Result Last Modified Date custom fields on the corresponding Result record will be populated with the current date/time. When a value is later updated, the Result Last Modified Date custom field will be re-populated with the current date/time.
- Result data is auto-saved for each input field after the user enters a value and clicks out from the data input cell. If no targets or results had been previously entered for a Project Indicator for that Geographic Area and Reporting Period, the result data is saved into a new Result record. If targets or results had previously been entered for a Project Indicator for that Geographic Area and Reporting Period, the result data is updated in the existing Result record.
- The number of input fields per indicator is controlled by the Cross-Disaggregation by Sex field and the presence of a child Disaggregated Project Indicator record.
- If the Project Indicator's Cross-Disaggregation by Sex checkbox is checked, input fields are displayed in the Male, Female, and Unknown column.
- If the Data Type is Percent, an additional input field is displayed in the Total column as well.
- If the Data Type is Currency or Numeric, an output field is displayed in the Total column that shows a summation of any values entered in the Female, Male and Unknown input fields.
- If the Data Type is Milestone or Qualitative, no input or output field is displayed in the Total column.

Display Total values for Disaggregated Indicators

The field Calculate_Total__c allows users to choose whether an output field is displayed in the Total column/row for a Project Indicator where Data_Type__c = Number, Currency, or Percent on the AddResults page.

Display total value

1. When a Project Indicator has Data_Type__c = Number or Currency, and Calculate_Total__c = Sum Total, the Project Indicator will display total output values on AddResults when the project indicator is:

Cross-disaggregated by sex

# of referrals for HIV testing and counseling services	25	26	8	8	9	9	8	9

Disaggregated by group

# of referrals for HIV testing and counseling services	45	25
0-5	35	8
6 - 11	9	9
11 - 18	1	8

Cross-disaggregated by sex and disaggregated by group

PROJECT INDICATOR	TOTAL		MALE		FEMALE		UNKNOWN	
	TARGET	RESULT	TARGET	RESULT	TARGET	RESULT	TARGET	RESULT
# of referrals for HIV testing and counseling services	836	386	139	144	113	64	584	178
0-5	183	185	78	78	100	9	5	98
6 - 11	136	48	5	45	6	1	125	2
11 - 18	517	153	56	21	7	54	454	78

2. When a Project Indicator has Data_Type__c = Percent, and Calculate_Total__c = Sum Total, the Project Indicator will display total values on AddResults.

Cross-disaggregated by sex: there are 4 input fields displayed - 1 input field for Total, Male, Female, and Unknown, respectively. Therefore, the field Calculate_Total__c *does not* impact this type of Project Indicator.
Disaggregated by group

% of participants	100 %	58 %
0-5	7 %	28 %
6 - 11	33 %	19 %
11 - 18	60 %	11 %

Cross-disaggregated by sex and disaggregated by group

PROJECT INDICATOR	TOTAL		MALE		FEMALE		UNKNOWN	
	TARGET	RESULT	TARGET	RESULT	TARGET	RESULT	TARGET	RESULT
% of participants	100 %	73 %	78 %	56 %	68 %	44 %	10 %	10 %
0-5	78 %	55 %	45 %	32 %	11 %	11 %	1 %	0 %
6 - 11	10 %	9 %	22 %	15 %	23 %	11 %	3 %	5 %
11 - 18	12 %	9 %	11 %	9 %	34 %	22 %	6 %	5 %

ⓘ **Admin Note:**
For quantitative Project Indicators where there is no level of disaggregation, there is only 1 input field, thus making the value in the Calculate_Total__c irrelevant for these Project Indicators.

Do not display total value

1. When a Project Indicator has Data_Type__c = Number or Currency, and Calculate_Total__c = Don't Sum Total, the Project Indicator will *not* display total values on AddResults when the Project Indicator is:

Cross-disaggregated by sex

PROJECT INDICATOR	TOTAL	MALE	FEMALE	UNKNOWN
# of referrals for HIV testing and counseling services		200	1,000	300

Disaggregated by group

PROJECT INDICATOR	TOTAL
# of referrals for HIV testing and counseling services	
0-5	78
6-12	65
13-18	7

Cross-disaggregated by sex and disaggregated by group

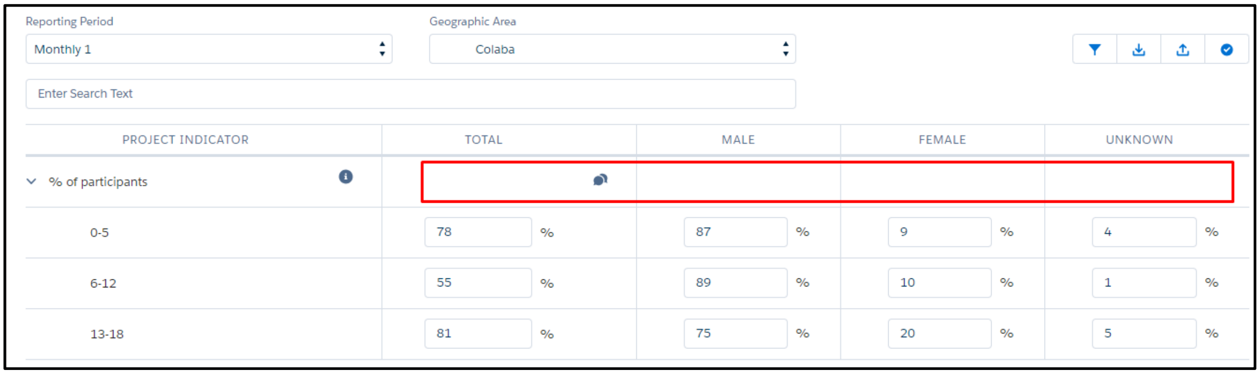
# of referrals for HIV testing and counseling services				
0-5		16	8	2
6 - 11		13	2	1
11 - 18		44	12	2

2. When a Project Indicator has Data_Type__c = Percent, and Calculate_Total__c = Don't Sum Total, the Project Indicator will *not* display total values on AddResults when the Project Indicator is:

Disaggregated by group

% of participants	
0-5	7 %
6 - 11	33 %
11 - 18	60 %

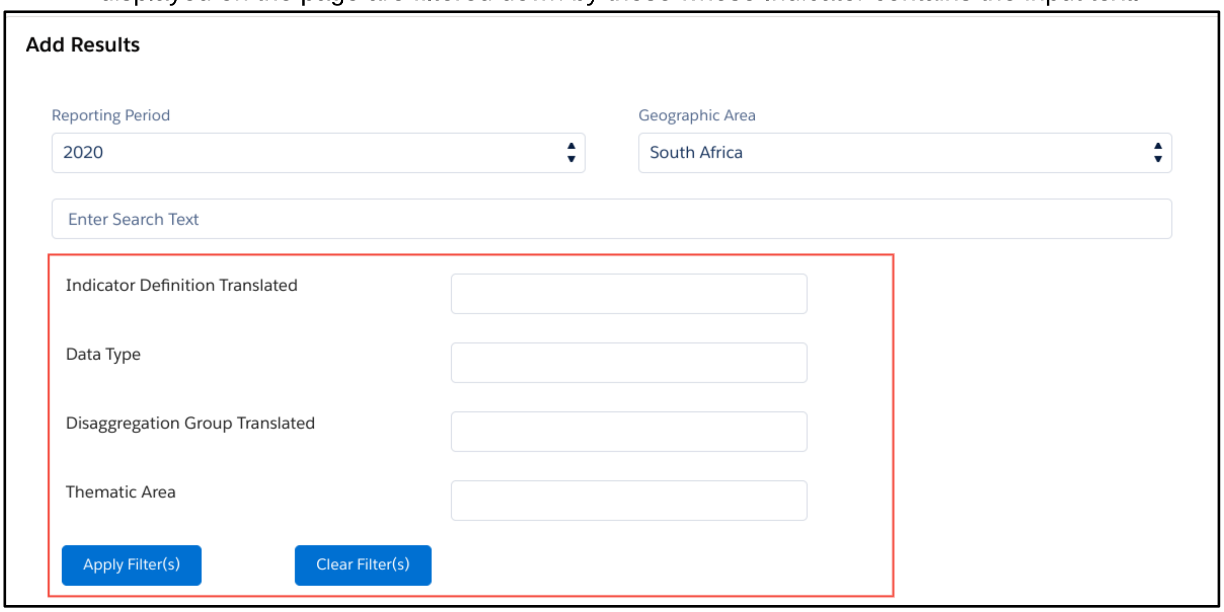
Cross-disaggregated by sex and disaggregated by group



ⓘ **Admin Note:**
Fields may be added to the Add Results table by navigating to the AR_SEARCH_FILTERS field set on Project_Indicator__c object.

Use search bar and filters to add results for specific types of indicators

a. As text is entered into the QuickSearch bar, as shown in the screenshot, the Project Indicators displayed on the page are filtered down by those whose Indicator contains the input text.



b. The project indicators field set can be configured to filter by specific, custom or standard field types. The following fields are available out of the box with Amp Impact:
   i. Indicator Definition
   ii. Data Type
   iii. Disaggregation Group
   iv. Thematic Area
   v. For further customization, please speak to your system admin and refer to the Installation Guide.

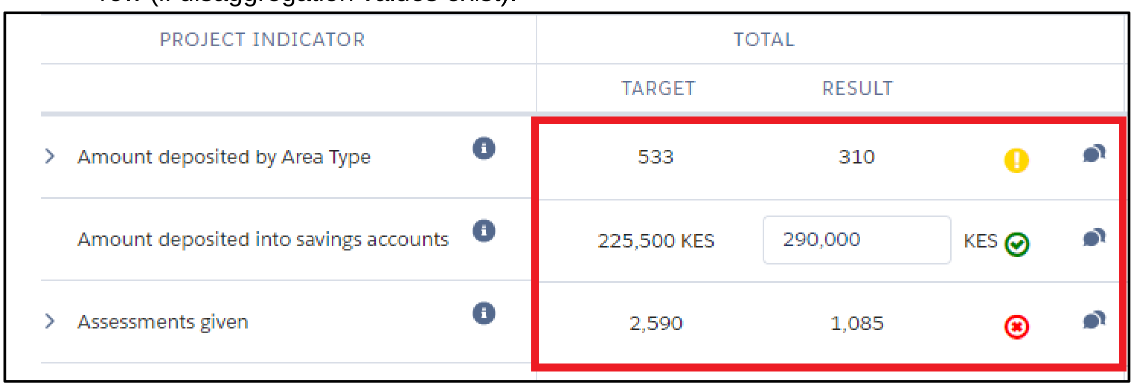
ⓘ **Note:**
Please note that when Quick Search and Filters are used together, the table displays only those results which match both criteria: the text in the quick search bar and specified filter criteria.

c. When "Clear Filters" is clicked, the filters are all cleared and the table reverts to display all Indicator records.

Indicator Performance Stoplights

Utilize stoplight icons to calculate results performance compared to targets.

- Through the Amp Impact Setup custom setting, an organization can choose to enable/disable the Indicator Performance Stoplights feature.
- For an organization to utilize the Indicator Performance Stoplights feature, the fields Aim, % Threshold Between Red and Yellow, and % Threshold Between Yellow and Green must be populated on Project Indicators.
    - ■ To ensure that these fields are available when creating an Indicator, an organization can add them to the Add New Custom Indicator pop-up by adding them to the ADD_NEW_INDICATOR_POPUP field set on the Indicator object.
    - ■ To ensure that these fields are available when editing a Project Indicator, an organization can add them to the Edit Project Indicator pop-up by adding them to the EDIT_PROJECT_INDICATOR_POPUP field set on the Project Indicator object.
- If Aim, % Threshold Between Red and Yellow, and % Threshold Between Yellow and Green all have values on the Project Indicator and there is a target value for the respective result input field, a red, yellow, or green stoplight icon is displayed next to the value in the Total column and the top row (if disaggregation values exist).



    - ○ If the Project Indicator's parent Indicator's Aim field value is set to Increase, the calculation formula is: Result Value / Target Value x 100:
        - If the calculation is greater than or equal to Threshold Between Yellow and Green, a green stoplight icon is displayed
        - 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.
        - If the calculated value is less than the Threshold Between Red and Yellow, a red stoplight icon is displayed.

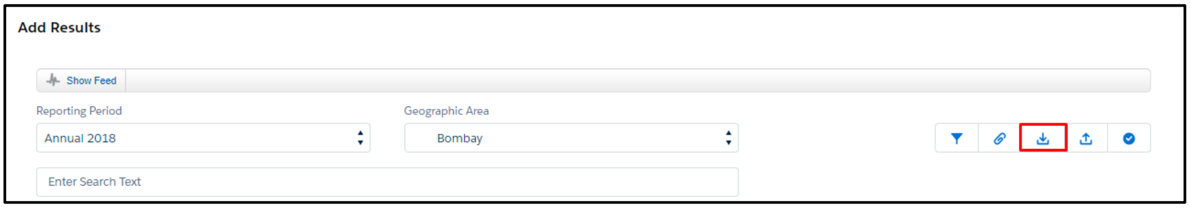
- If the Project Indicator's parent Indicator's Aim field value is set to Decrease, the calculation formula is: (((Target Value - Result Value)/ Target Value)*100)+100
  - If the calculation is greater than or equal to Threshold Between Yellow and Green, a green stoplight icon is displayed.
  - If the 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.
  - If the calculated value is less than the Threshold Between Red and Yellow, a red stoplight icon is displayed.

ⓘ **Admin Note:**
If Target Reporting Frequency is different from the Reporting Frequency for a particular Project Indicator, then no stoplight will appear for that Project Indicator. In order to provide a meaningful comparison of the result and target values for a project indicator, the stoplight functionality will only operate when the reporting frequencies for targets and results are equal. By doing this, the functionality prevents the comparison of an Annual target value to a Monthly result value.

Download Results data to an Excel file

ⓘ Admin Note:
The ability for users to access the download excel button can be controlled through the Results custom setting (please refer to Installation guide for access and set-up details).

a. To download targets for Project Indicators for a specific reporting period and geographic area, the user clicks the "Download" button.

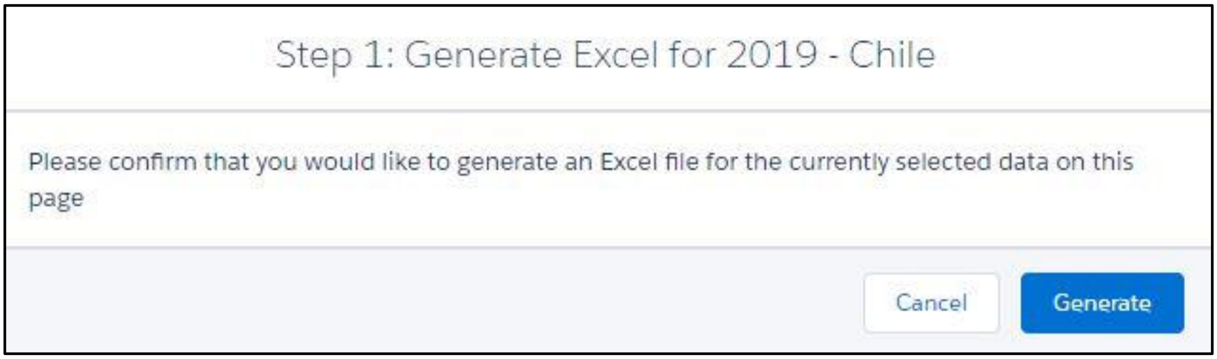


ⓘ Note:
Users can decide which data is downloaded by applying Filters (using the Filter button and/or the Search text bar). On open, the excel file will contain only data that matches the filters applied at the time of download.

ⓘ Note:
For a particular Project Indicator, if targets are set at a different reporting frequency than results, then the targets for that project indicator will not appear in the downloaded excel file. Because the excel download functionality downloads for a specific reporting period and geographic area, only the data that displays on the AddResults will download.

Similarly, if the results for a particular Project Indicator are disaggregated, but the targets are not (ie, Targets_are_disaggregated__c = FALSE), and they are both reported at the same reporting frequency, then only the total target value for that particular Project Indicator will appear in the downloaded excel file To download Indicators for a specific project, reporting period and geographic area, the user clicks the “Download” button.

b. OnClick of “Download”, a pop-up opens. The ‘Generate’ pop-up will ask the user to confirm generating the excel sheet for the particular reporting period and geographic area selected. In this pop-up, the user can either click ‘Generate’ or ‘Cancel’
    i. If there is no project indicator linked to a geographic area and reporting period, then selecting ‘Generate’ will prompt an error message.
    ii. Selecting ‘Cancel’ will exit from the ‘Generate’ pop-up. The page will remain on the AddResults page.

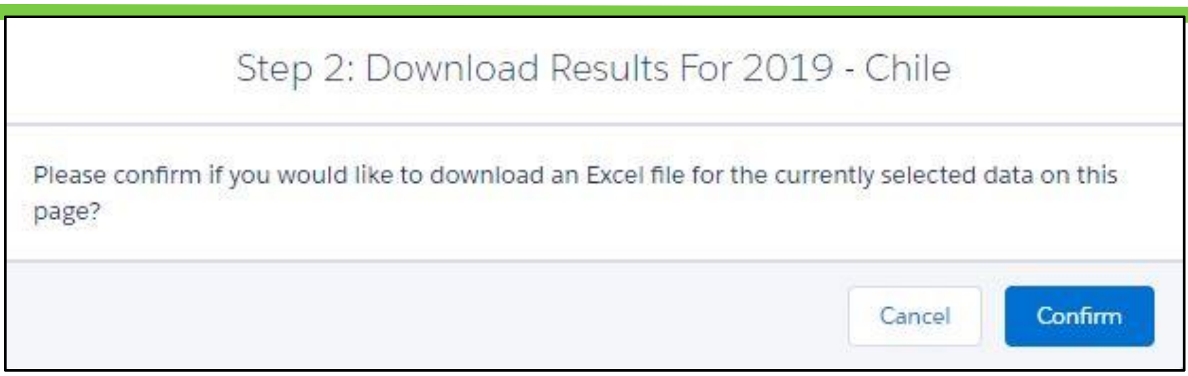


ⓘ Using custom labels, the user may edit/ customize the following in the ‘Generate’ pop-up: Generate_Excel_Text, Generate_Excel_Button, Generate_Excel_Header.

c. If there is at least one project indicator linked to a geographic area and reporting period, then selecting ‘Generate’ will prompt a ‘Confirm’ pop-up. The ‘Confirm’ pop-up will ask the user to confirm the download of the excel sheet for the particular reporting period and geographic area selected. In this pop-up, users can either click ‘Confirm’ or ‘Cancel’

ⓘ Using custom labels, the user may edit the following in the ‘Confirm’ pop-up: Download_Targets_Header.

    i. Selecting ‘Cancel’ will close the pop-up and the user will remain on the AddResults page.
    ii. Selecting ‘Confirm’ will prompt the download of the excel file onto the AddResults page.



d. Once 'Confirm' has been selected, the file will download. OnOpen of the file, 2 tabs will be shown:
   i. The first tab will be labeled as, "Instructions' - this tab will outline how to enter data in a compatible format to upload the document onto the AddResults page
   ii. The second tab will change dynamically to reflect the reporting period and geographic area, and will be formatted as such - '[Reporting Period label] - [Geographic Area name]'. Below the header, the date and time of download, and the name of the user who downloaded the file are also displayed
e. The downloaded results excel file will all be stored as ContentVersion files under the Files related list on the relevant Reporting Period. If a user downloads an excel file multiple times for the same geographic area and reporting period, these ContentVersion files are updated to reflect the last download date, and the owner of the ContentVersion record is updated to the user who last downloaded the results. The user may access all of the versions that have been downloaded by selecting 'View previous versions'.

Upload Results data from an Excel file

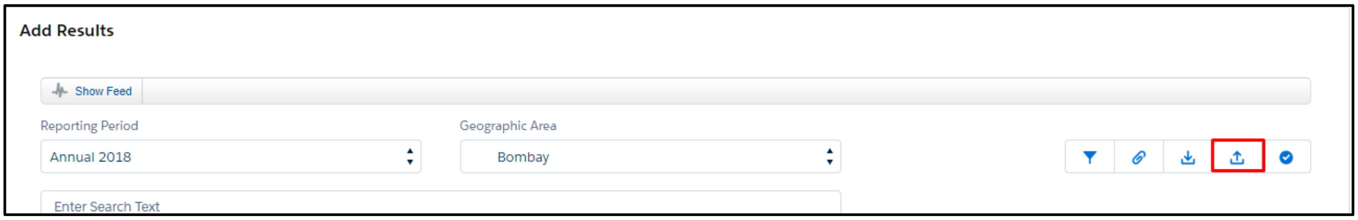
> ⓘ Admin Note:
> The ability for users to access the download excel button can be controlled through the Results custom setting (please refer to Installation guide for access and set-up details).

a. Once the results have been downloaded for a given reporting period and geographic area, the user can open the downloaded excel to view and add results to upload (Please see the section above on downloading results as an excel file)

a. To upload the results, data may be added to the 2nd tab of the Excel spreadsheet. The following may be edited:
   i. The number of tabs
   ii. The values in the input cells which are indicated by the blue background
   iii. The text in the comments column per Project Indicator where Data_Type__c = Input (Comments may not be uploaded for Aggregated/Calculated Project Indicators on AddResults)
b. The following portions of the excel sheet may not be edited in order to comply with the compatibility of re-uploading
   i. The header text on the tab with the downloaded data
   ii. The names of the column headers in the downloaded tab

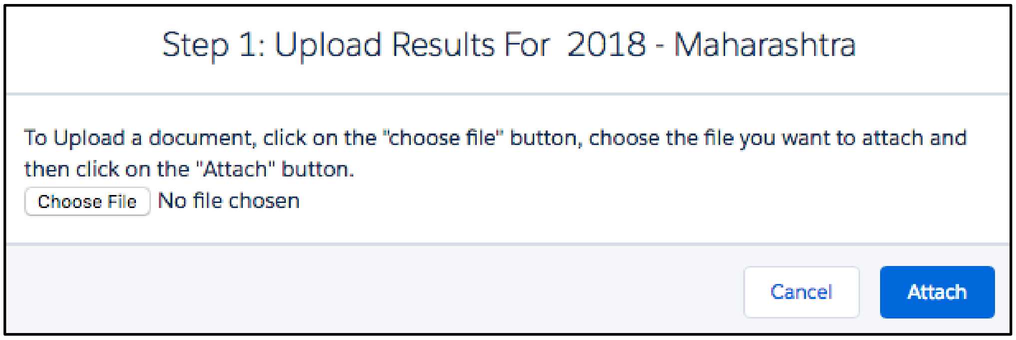
iii. The name of the downloaded tab
iv. The existence of one tab with the Reporting Period and Geographic Area as the label

c. Once data has been entered into the excel sheet, the user must navigate to the AddResults page and click the Upload button in the top right corner of the screen

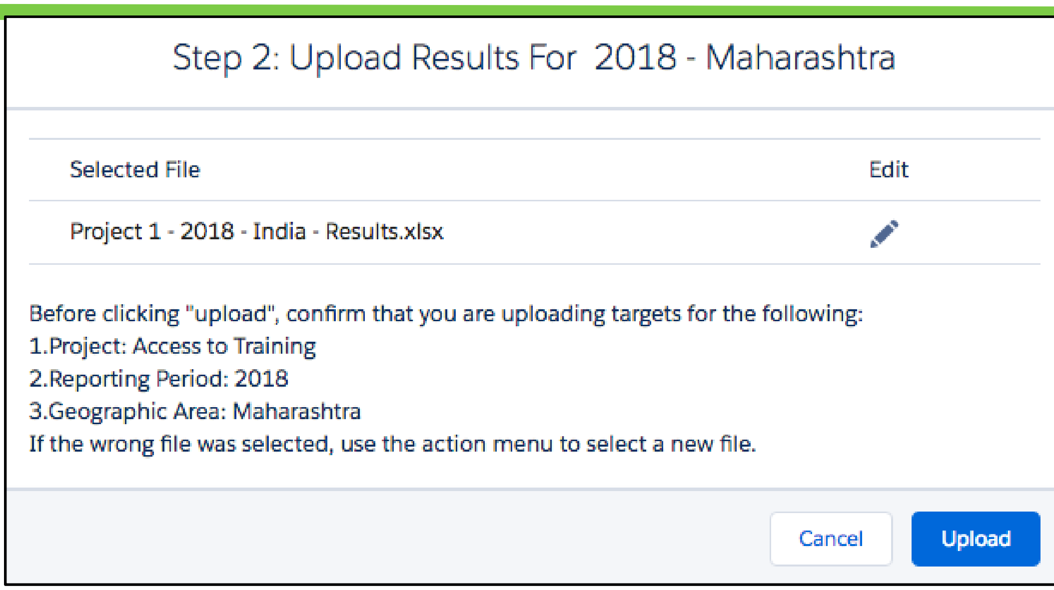


Step 1- Selecting the Upload button will prompt a popup to allow the user to attach the file to be uploaded for that particular geographic area and reporting period.

i. The user may click on “Cancel” at any time and return to the AddResults page, with no records updated.
ii. When choosing a file, ensure that the file type is ‘xlsx.’. Clicking “Attach” will prompt the next popup. At this step, an error message will appear onclick of “Attach”if the uploaded document is not in the .xlsx format, in which case, the user must revisit the document to be uploaded and edit it to make it compatible.

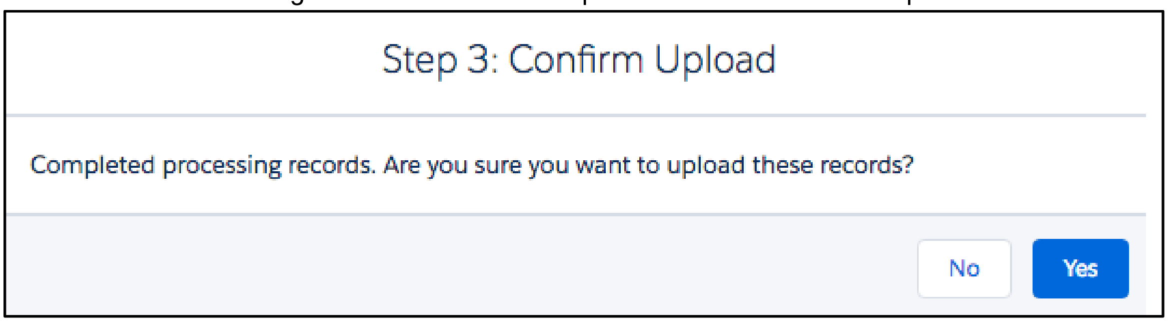


Step 2- Once the upload popup appears, click on the “Upload” button. The popup will confirm the reporting period, geographic area, and project name.

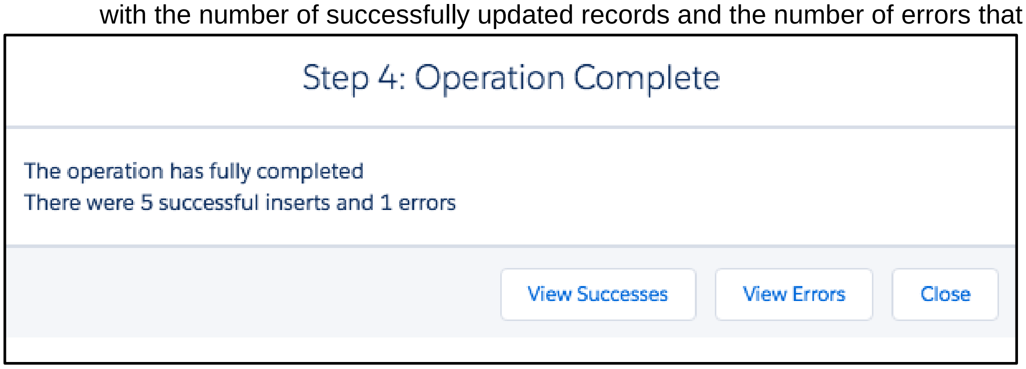


Step 3 - Once the upload is complete, a “Confirm Upload” popup will appear. The popup will ask the user to confirm that the records uploaded should update the results for the chosen reporting period and geographic area

i. Selecting “No” will cancel out of the popup, with no records updated
ii. Selecting “Yes” will confirm the upload and the records will update



Step 4 - Once the user has selected “Yes,” there will be a popup that reads “Operation Complete,” with the number of successfully updated records and the number of errors that occured



On this popup, there are several buttons:

- “View Successes” - selecting this shows the user the successful uploads. Clicking *View Successes* button will cause a download of a file with all of the indicators that successfully uploaded. This file will occur on the STAR pages and a record on ContentVersion will also be created.

    - If there were no successes, the *View Successes* button will not display in Step 4
    - The success log excel file will all be stored as ContentVersion files under the Files related list on the relevant Reporting Period. With each generation of success log, these ContentVersion files are updated to reflect the last upload date, and the owner of the content version record is updated to the user who last uploaded the results. ContentVersion records also allow users to access previous versions that have been uploaded by selecting 'View previous versions'.
    - The rows in the downloaded success log will be ordered by alphabetically ascending Indicator definitions.
  - "View Errors" - selecting this shows the user an error log of records that could not be successfully uploaded and the associated errors . Clicking on *View Errors* button will cause a download of a file with all of the indicators that unsuccessfully uploaded. This file will occur on the STAR pages and a record on ContentVersion will also be created.
    - If there were no errors, then the *View Errors* button will not display in Step 4
    - The error log excel file will all be stored as ContentVersion files under the Files related list on the relevant Reporting Period. With each generation of error log, these ContentVersion files are updated to reflect the last upload date, and the owner of the content version record is updated to the user who last uploaded the results. ContentVersion records also allow users to access previous versions.
    - The rows in the downloaded success log will be ordered by alphabetically ascending Indicator definitions.

d. The user can download the success/error logs and then close the pop-up. This will automatically refresh the AddResults page and display the newly updated records.
e. The uploaded results excel file will all be stored as ContentVersion files under the Files related list on the relevant Reporting Period. With each upload of results these ContentVersion files are updated to reflect the last upload date, and the owner of the content version record is updated to the user who last uploaded the results. ContentVersion records also allow users to access previous versions.

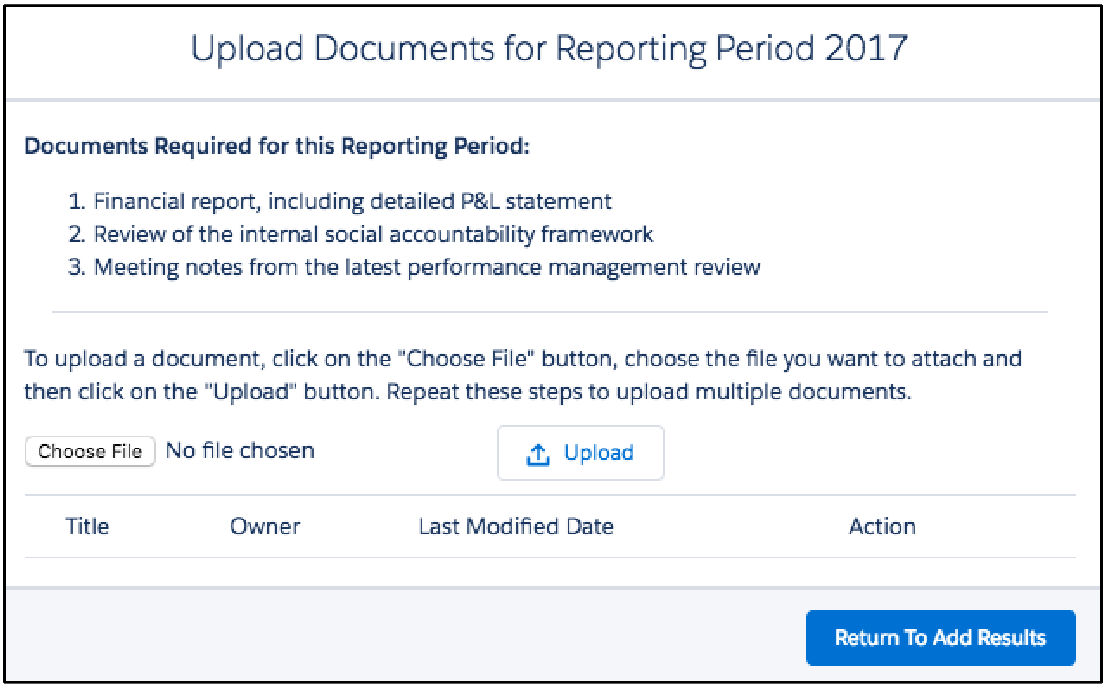
Upload documents

Through the *Amp Impact Admin* custom setting, an organization can choose to enable/disable the Upload Documents feature. This feature allows users to upload documents supporting the results data they have entered for the specific reporting period.

When the *Attach* button is clicked, the Upload Document pop-up window displays for the currently selected Reporting Period. The window displays:

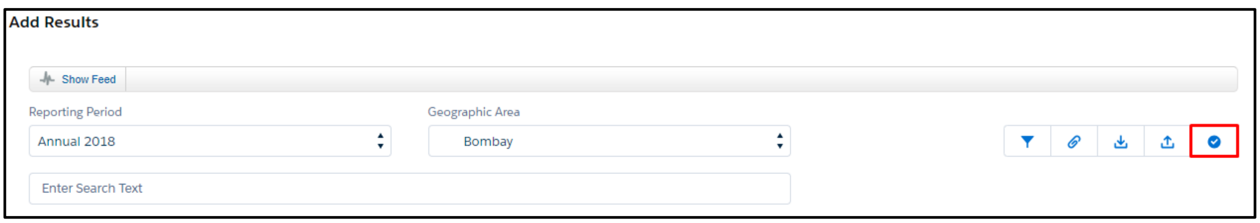
- Any rich text data entered in the Documents_Required_for_RP__c field on Reporting_Period__c object. This allows organizations to specify the list of documents they want or recommend users to upload to support the data they have reported.
- Interface to choose a file to upload and upload button.

A table listing the documents uploaded, with owner and date details. These documents can be edited/updated versions can be uploaded using the Edit icon.

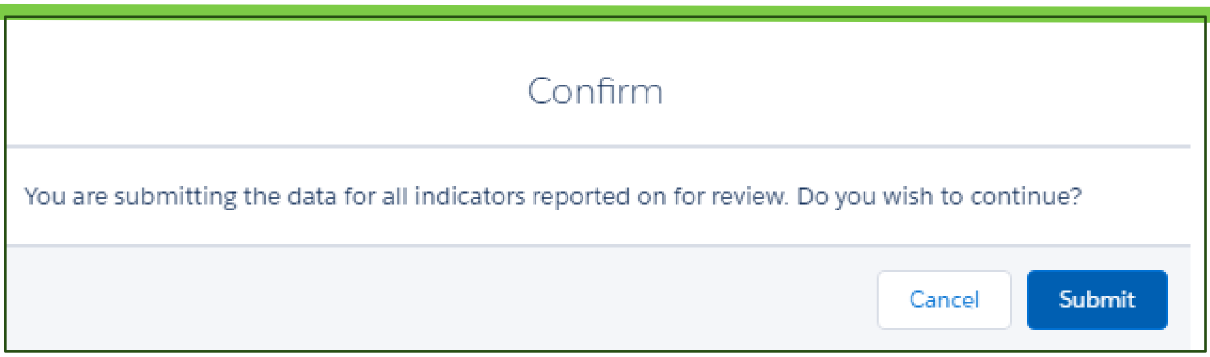


Submit Results for review

Through the *Amp Impact Admin* custom setting, an organization can choose to enable/disable the Submit Results feature.



Once data entry is complete for the results for a given Reporting Period, the user clicks the *Submit* button. The text in the pop-up window that displays can be edited by users in the Confirm_Submit_Review custom label.



Users are able to submit results for multiple Reporting_Period__c records, if applicable. For example, a user may need to submit results for Chile for quarter 2 and the semi-annual report. They can go to the relevant reporting periods, enter data and then submit.

Customize a review process for adding results to garner approval from relevant team-members

Users have the option to create workflows that trigger certain actions on the click of the Submit button. For example, clicking on the Submit button can set a specific Status and generate an email notification. OnClick of “Submit’ on the AddResults page, Result_Status__c = Submitted, thus making the AddResults page uneditable. To make the page uneditable when any other status is selected, the Result_Status__c field can be configured through a workflow to edit the Results_Locked__c field which can lock the result input fields for that Reporting Period and Geographic Area un-editable so that users can no longer make any changes to the data entered.

On the AddResults page, the results display as output fields when

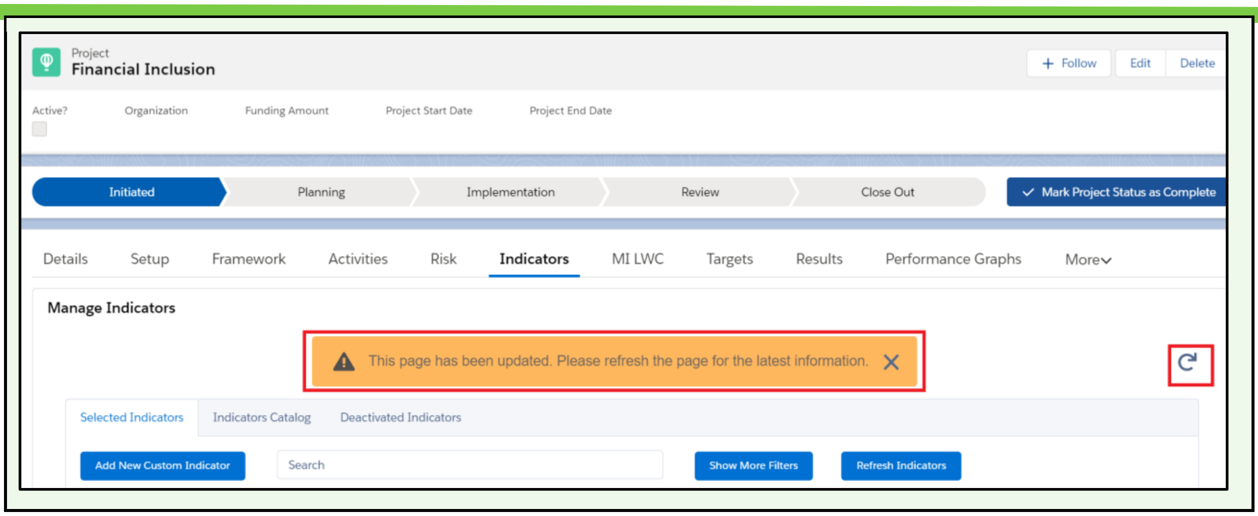
- The field Results_Locked__c = TRUE for a reporting period, OR
- Result_Status__c = Submitted .

When the results appear as output fields, the user cannot edit the targets entered. Project Indicators with Data Type = Qualitative will display a *View* icon.
Once the user clicks the *Submit* button, the *Upload* button is greyed out to prevent any additional results from being uploaded.

ⓘ **Admin Note:**
If edits are made on the AddResults page, such as a result value or a comment is created, deleted, or edited, the following Visualforce pages will display a Refresh icon and a warning message alerting the user that the data on that page is not updated with the most accurate data.

Clicking on the Refresh icon will reload the current page to display on the current page any changes made on AddResults.

Impacted pages: ManageFramework, SetTargets, ManageIndicators, Performance Graphs



Performance Graphs

Overview: The Performance Graphs Visualforce page allows users to visualize the targets and results that have been entered for Project Indicator records over time. The page allows users to select up to nine numerical indicators to visualize data for.

Select indicators to visualize data

In the Selected picklist, all Project Indicators with a Data Type of Number, Currency, or Percent are displayed in alphabetical order.

ⓘ **Admin Note:**
Project Indicators with a Data Type = Percent are displayed on the Performance Graphs page if the Project Indicator (1) has no level of disaggregation and corresponds to only one Geographic Area OR (2) is Cross-Disaggregated by sex and corresponds to only one Geographic Area.

If the above criteria are not met, then the Percent project indicator will not appear in the dropdown of project indicators to choose from on the Performance Graphs page.

On click of the dropdown on the Performance Graphs page, a user may check the checkbox next to a Project Indicator to display a chart for that indicator's data. A maximum of nine charts can be displayed. When the page loads, the first nine records are checked by default. Selections are applied when the Apply Selection button is clicked.

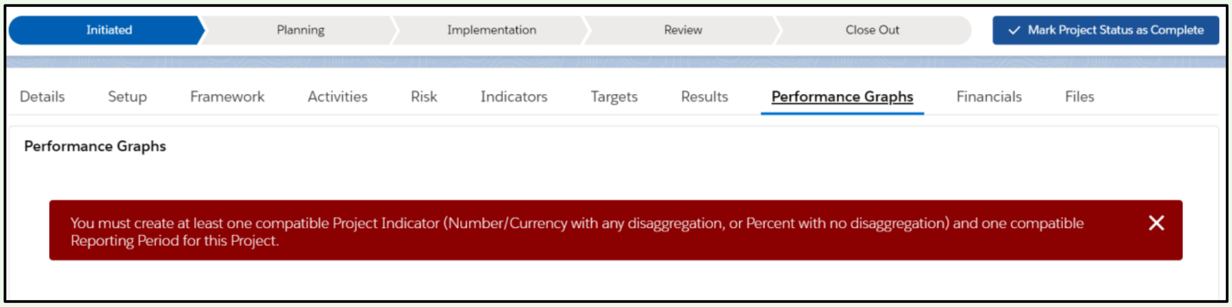
If a selected Project Indicator has no Result values, the chart will not display.

ⓘ **Admin Note:**
Each graph on the Performance Graphs page displays values from the Total_Target__c and Total_Result__c fields on the Results object.

The y-axis displays the Target Value field in one series and the Result Value in another series. If there are multiple Result records for the same reporting period (i.e. in the case of an indicator with multiple disaggregation values), the Target Values and Result Values are summed up across all the records.

In each chart's legend, the Target and Result labels can be clicked to show and hide the Targets and Results series values.

ⓘ If a project consists of only one Project Indicator which is of percent data type and is related to a disaggregation group, then the following error message will be displayed on the Performance Graphs page.



Visualize targets and results for selected indicators

In each chart, the x-axis displays the Target Reporting Period Name from Project Indicator Reporting Period records related to the Project Indicator's Result records. The x-axis is sorted by:

- Reporting Period End Date in ascending order
- Where Reporting Periods have the same End Date, then subsequently sorted by Reporting Period Start Date in descending order

ⓘ **Admin Note:**

If Calculate_Total__c = Don't Sum Total, and the Project Indicator has any level of disaggregation (i.e. has a related Disaggregation Group, is Cross-Disaggregated by Sex, or is related to multiple Project Geographic Areas), then that Project Indicator will not appear on the Performance Graphs page.

This is due to the fact that each bar in the graphs is populated based on the total target and result value(s) in the Total_Target__c and Total_Result__c fields respectively.

For this reason, when a User chooses to hide the total value for a particular Project Indicator by setting the field Calculate_Total__c = Don't Sum Total, the fields Total_Target__c and Total_Result__c fields will be = NULL.

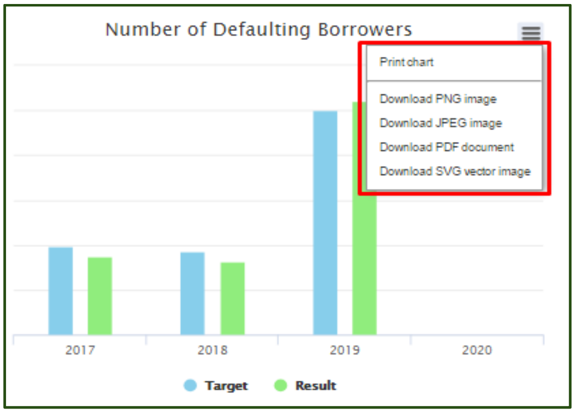
Visualize targets and results with different reporting frequencies

If the Target reporting frequency for a particular Project Indicator is different than the Results reporting frequency (ie, Target_Frequency__c does not equal Reporting_Frequency__c), then the graph for that Project Indicator on the Performance Graphs page will display with the Reporting Period(s) that correspond to the Target Reporting Frequency.

The Results bar will display a summed value for all Results (if the project indicator is non-cumulative) or it will display the last reported Result (if the project indicator is cumulative).

Download or print charts

The icon in the top-right corner of each chart can be clicked to display different file formats to download or print the chart.



Financials

ⓘ **Admin Note:**
In Salesforce Lightning, this page is known as “Financials,” and the Budget Related List with Budget records are shown. The images below display the page as seen on Salesforce Lightning.

In Salesforce Classic, this page is known as “ManageDisbursements,” and displays the Disbursements table only. The Budget Related List is not shown.

The Financials tab page enables users to (a) create, schedule, and track disbursement payments for their program/grants/investments and (b) access their Project Budgets.

The page features two tables, one with Disbursement records and one with Budget records. The Disbursement records of a Project displays each Disbursement’s Scheduled Date, Amount, Percent (of the Project’s Funding Amount), and Status. The fields in the Disbursements table may be controlled using the DISBURSEMENT_TABLE fieldset on the Disbursement__c object.

Beneath the Disbursement table is a related list that displays all Budget records for the project. Clicking into a Budget record displays a chart of the actual vs planned expenditure and detailed line-item expenditure.

Overview of Disbursements Table

The page displays a summary that gives a brief overview of the Project’s time span and how much of its funding amount has been paid to date. In order to enable a project summary on the ManageDisbursements Page, navigate to Custom Settings → Select “Manage” next to “Amp Impact Setup” → Check the box that reads “Project Summary on Manage Disbursements?”

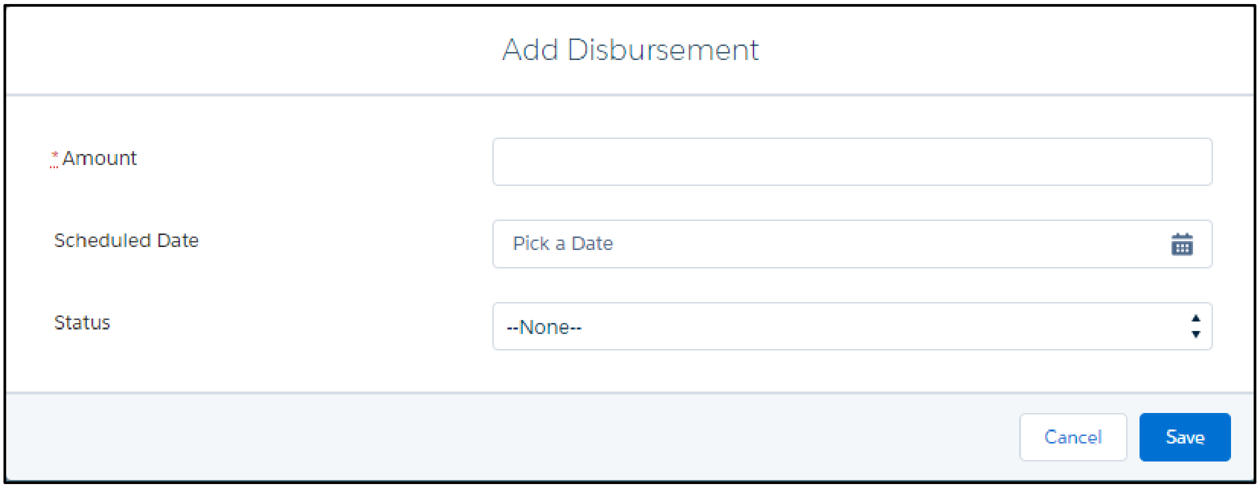
The fields in this summary section are controlled through the PROJECT_SUMMARY field set on the Project__c object.

The Disbursements table displays each Disbursement’s Scheduled Date, Amount, Percent (of the Project’s Funding Amount), and Status. The fields in the Disbursements table may be controlled using the DISBURSEMENT_TABLE fieldset on the Disbursement__c object. The first field in the fieldset is hyperlinked and clickable to the Disbursement__c record. Adding fields of a specific type such as percent or currency will display the symbol next to value in the column.

Create and Schedule Disbursement records

1. From the Financial page, a user can create new Disbursement records by clicking the “Add New” button at the bottom left of the page. A pop-up will appear for the user to fill out - the only required field is Amount. When a user clicks “Save”, the Disbursement record is created, and its values appear in the table. All numeric values will automatically add separators to the input.

ⓘ **Admin Note:**
The fields that appear in the 'Add New Disbursement' popup can be edited through the ADD_EDIT_POPUP Field Set on the Disbursement object.



2. The % column in the table displays a formula field that calculates (Disbursement Amount / Project Funding Amount) * 100. The calculated amount is then rounded to the second decimal place to be displayed in the column.
3. The Disbursements in the table are ordered by ascending Scheduled Date. The table automatically calculates the total amount of a project's disbursements and the total percentage of the funding amount that has been scheduled for disbursement at the bottom of the table.

PROJECT START DATE	PROJECT END DATE	FUNDING AMOUNT	PAID AMOUNT
		$10,000.00	$1,400.00

SCHEDULED DATE	AMOUNT	% OF FUNDING AMOUNT	STATUS	ACTION
6/1/2018	600 USD	6.0 %	Scheduled	
7/2/2018	30 USD	0.3 %	Pending	
8/1/2018	1,000 USD	10.0 %	Approved	
9/1/2018	1,400 USD	14.0 %	Paid	
TOTAL	3,030 USD	30.3 %		

4. Fields that are of data type Text Area (Long), for example ampi__Conditions__c, display as left-aligned text in the table.

Track progress of Disbursements

Each Disbursement record has an Edit and Delete icon next to it. To update the status of a Disbursement - for example, to change the status from “Pending” to “Approved” - a user can click the Edit icon and update the value of the Status picklist field.

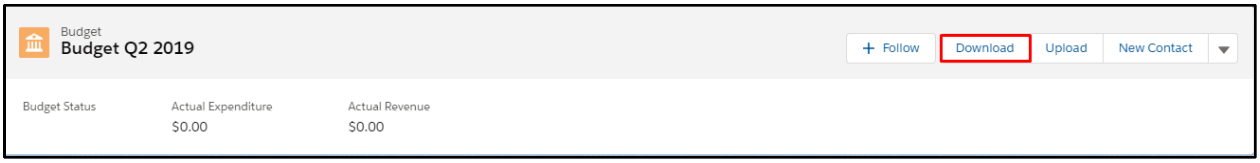
When a Disbursement Status is updated to “Paid”, the Amount value of the Disbursement is rolled up to the Paid Amount field in the Project Summary above the table.

If a Disbursement Status is updated to “Paid,” that Disbursement cannot be deleted unless the status is changed from “Paid,” to one of the other options (Scheduled, Pending, or Approved). If the status of a disbursement record is updated to “Paid”, the delete bin icon will be greyed out and become unclickable.

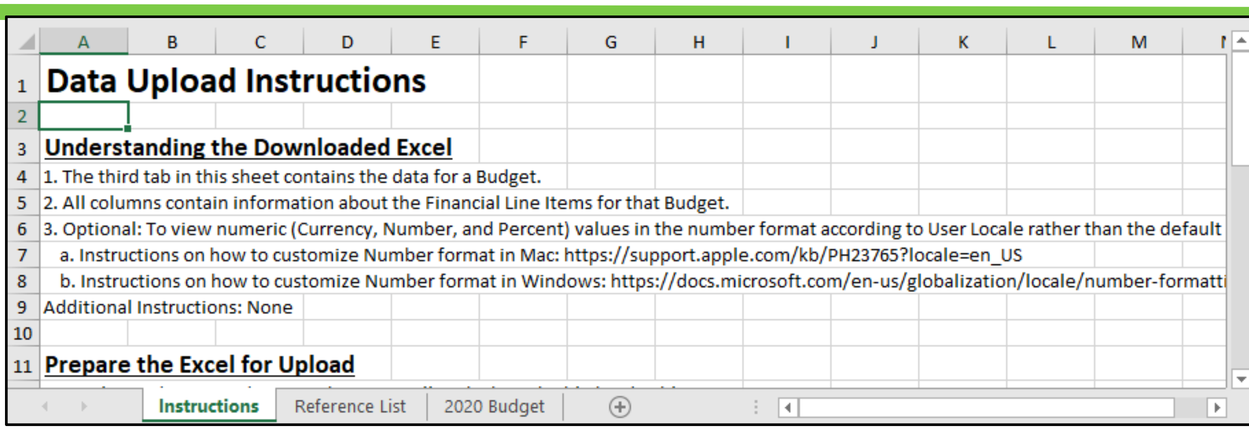
Manage a Budget to track Actual and Planned Expenditure

Download a Budget

1. To download a budget with its corresponding child financial line items, click on the *Download* button on the relevant Budget record. The budget Excel will download directly on the page.



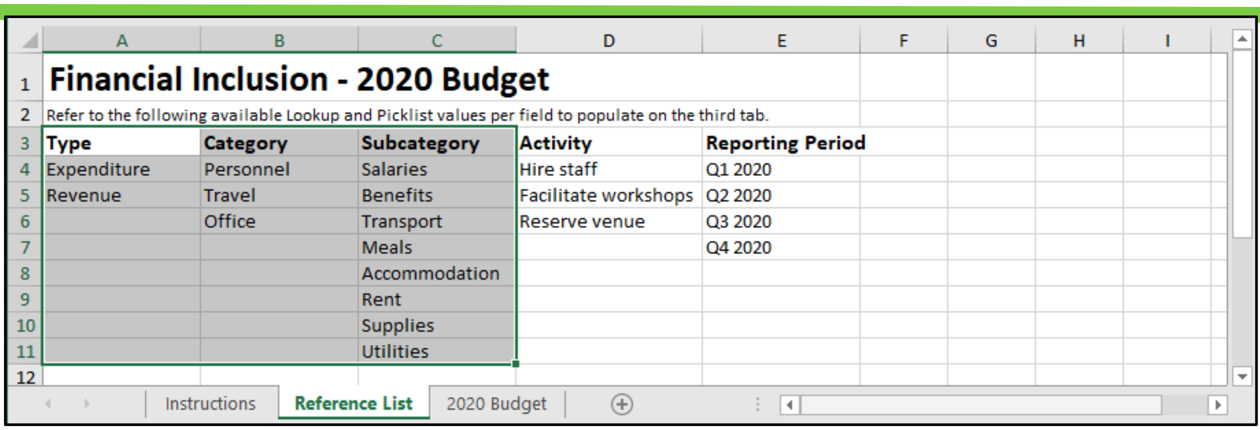
2. When opening the downloaded Excel file, there are three tabs:



   a. Tab 1 - “Instructions”: 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 - “Reference List”: this tab provides all possible values for any picklist or relationship fields that are included on Tab 3.
   c. Tab 3 - “Budget name”: this tab displays a template with column fields from the Financial object. If there is existing data in the Budget record, it will display here; otherwise this will download as a blank template.
3. The following may be edited in the Excel sheet:
   a. The number of tabs, and
   b. The values in the input cells which are indicated by the blue background in Tab 3.
4. Opening Tab 3 displays a header with the name of the project and the name of the budget. The row just below this header displays the date of download and the name of the user who downloaded the file.

ⓘ **Admin Note:**
Users may speak to a system admin to add any custom fields to the BUDGET_EXCEL_COLUMNS fieldset on ampi__Financial__c. Each of the headers in row 3 are controlled using the BUDGET_EXCEL_COLUMNS fieldset on the Financial object. The default fields in the BUDGET_EXCEL_COLUMNS fieldset include Name, Type__c, Category__c, Subcategory__c, Amount_Planned__c, Amount_Actual__c, Cost_per_unit__c, Unit__c, Quantity__c, Description__c, Activity__c, Reporting_Period__c.

5. The fields Type__c, Category__c, and Subcategory__c are picklist fields with default values that come out of the box. Within the excel file, these picklist values can be accessed on the “Reference List” tab.
   a. Values for custom picklists can also be accessed on the “Reference List” tab.



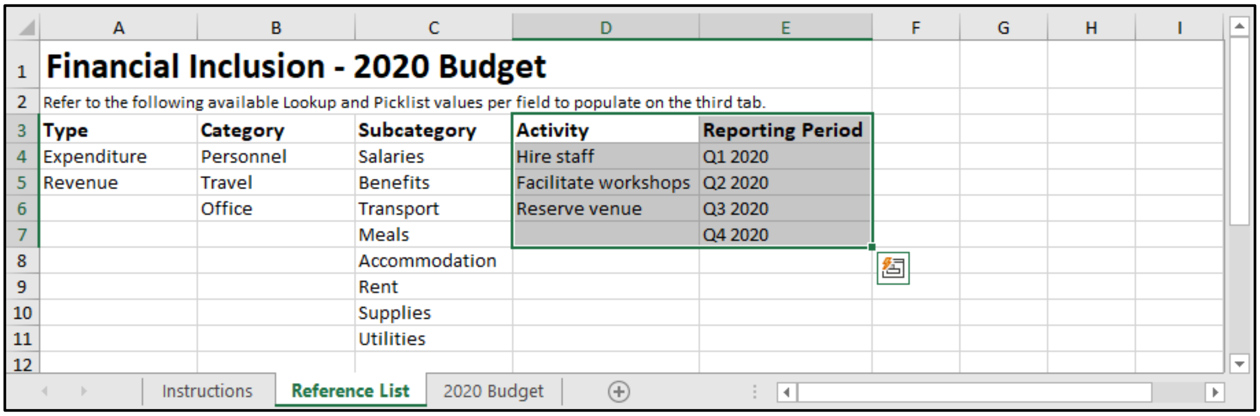
Financial Inclusion - 2020 Budget

Refer to the following available Lookup and Picklist values per field to populate on the third tab.

Type	Category	Subcategory	Activity	Reporting Period
Expenditure	Personnel	Salaries	Hire staff	Q1 2020
Revenue	Travel	Benefits	Facilitate workshops	Q2 2020
	Office	Transport	Reserve venue	Q3 2020
		Meals		Q4 2020
		Accommodation		
		Rent		
		Supplies		
		Utilities		

Instructions | Reference List | 2020 Budget

6. The lookup field Activity__c is optional for the user to fill out in the downloaded spreadsheet to be uploaded back onto the Budget. The master-detail field Reporting_Period__c is required and must be filled out in order to successfully upload financial line items. Users must enter the desired value in the spreadsheet for all lookup/master-detail fields; these values can be accessed on the “Reference List” tab.
    a. Values for custom lookup/master-detail fields can also be accessed on the “Reference List” tab.



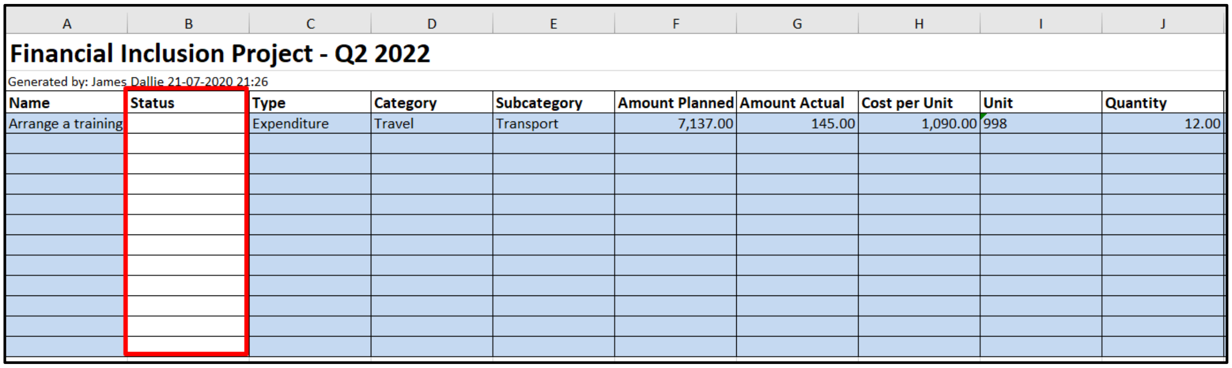
Financial Inclusion - 2020 Budget

Refer to the following available Lookup and Picklist values per field to populate on the third tab.

Type	Category	Subcategory	Activity	Reporting Period
Expenditure	Personnel	Salaries	Hire staff	Q1 2020
Revenue	Travel	Benefits	Facilitate workshops	Q2 2020
	Office	Transport	Reserve venue	Q3 2020
		Meals		Q4 2020
		Accommodation		
		Rent		
		Supplies		
		Utilities		

Instructions | Reference List | 2020 Budget

7. When a user downloads financials from the Budget record page, such that a formula field (e.g. ampi__Status__c) is added to ampi__BUDGET_EXCEL_COLUMNS fieldset on ampi__Financials__c, the financial Excel file displays the formula field as uneditable (i.e. with white background).



Financial Inclusion Project - Q2 2022

Generated by: James Dallie 21-07-2020 21:26

Name	Status	Type	Category	Subcategory	Amount Planned	Amount Actual	Cost per Unit	Unit	Quantity
Arrange a training		Expenditure	Travel	Transport	7,137.00	145.00	1,090.00	998	12.00

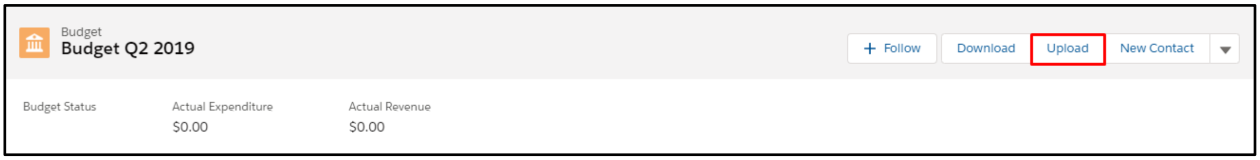
The following may not be edited for Tab 3 in order to ensure compatibility with the Upload feature:

- Tab name
- Header text
- Names of the column headers
- The existence of at least one tab with the Budget name as the label

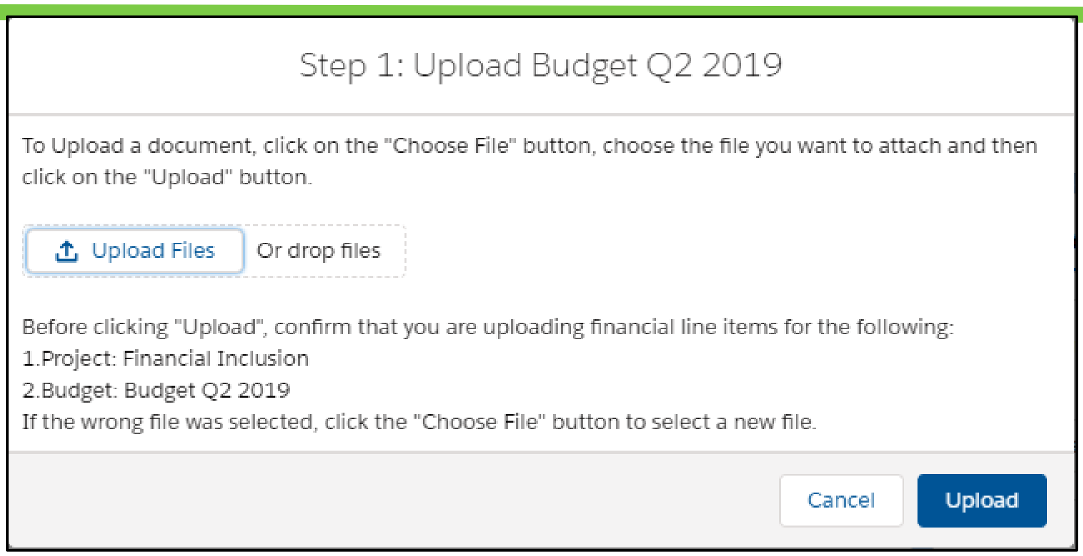
All numeric data will display in US English format. Regardless of the currency locale enabled in Salesforce settings, all downloaded budgets will display in this format. Guidelines are provided in the *Instructions* tab to edit the Excel settings to view numeric data in the format of preference.

Upload a Budget

a. In editing the downloaded excel spreadsheet, users are able to update existing financial records and upsert - or create new - financial records. In the downloaded file, users are able to add/update records by entering data in the blue input cells.
b. Users are able to download a budget which does not have any child financial records. Upon downloading and subsequently opening the downloaded file for a budget with no financial line items, users will see a template to be used to upload financial records onto the budget. The first ten rows are marked as blue input cells.
c. Date and date/time fields must be inputted as YYYY-MM-DD and YYYY-MM-DD HH:MM:SS respectively for successful upload.
d. For example, date may be inputted as 2020-01-08 and date/time as 2020-01-08 02:26:00 in the appropriate cell.
e. Once data has been entered into the excel sheet, the user must navigate back to the Budget record page. On this page, click the *Upload* button.

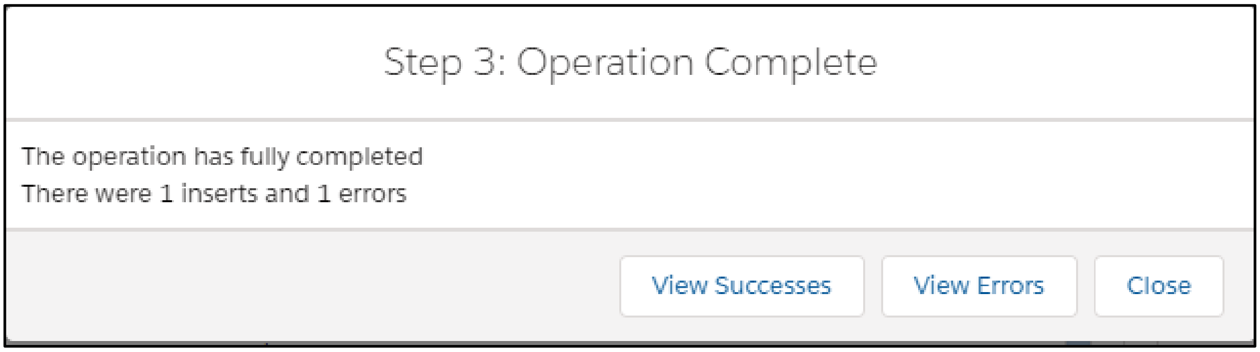


f. *Step 1* - Selecting the *Upload* button on the Budget page layout will prompt a popup for the user to attach the edited file to be uploaded. Ensure that the file type is ‘xlsx.’. Onclick of “Upload” in this popup, an error message will appear if the uploaded document is not in the .xlsx format, or is an incompatible format. In this case, the user must revisit the document to be uploaded and edit it to make it compatible. If successful, clicking “Upload” will prompt the next popup. The user may click *Cancel* at any time and return to the Budget page, with no records updated/upserted.



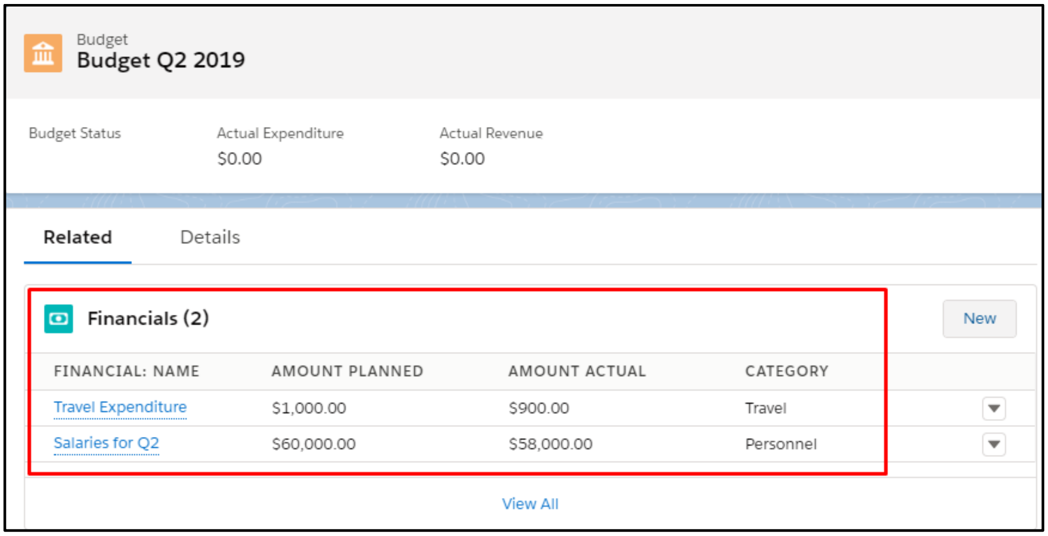
g. *Step 2* - After a file has been selected in step 1, a new popup will ask users to confirm the upload. In this popup, users will have the option to click ‘Yes’ which will confirm the upload. Clicking on ‘No’ will close out of the step 2 popup and the page will return to the Budget page with no changes made.

h. *Step 3* - The last popup encountered while uploading will read “Operation Complete,” with the number of successfully updated records and the number of errors that occurred.



i. On this popup, there are several buttons:

j. “View Successes” - selecting this shows the user the successful uploads. Clicking on *View Successes* button will download an excel file with all of the financial items that successfully uploaded. This file will download on the Budget page.
k. If there are no successes, the *View Successes* button will not display in Step 3
l. “View Errors” - clicking on this button shows the user an error log of records that could not be successfully uploaded and the associated errors. Clicking on *View Errors* button will download an excel file with all of the financial items that were unable to be uploaded with a column explaining what the error was. This file will download on the Budget page.
    i. Any values added to or updated in the formula field of the Excel file do not reflect in the formula field on the Financials object in Amp Impact. However, if a financial Excel file containing changes made to the formula field is uploaded to the Budget record, the file uploads successfully, without throwing any error messages in the error log Excel file.
m. If no errors occurred, the *View Errors* button will not display in Step 3
n. The user can download the success/error logs and then click on the “Close” button in the step 3 pop-up. This will automatically refresh the Budget page. Upon navigating to the Related tab, the newly updated/upserted records will display.



o. The downloaded budget excel file, the success log, and error log will all be stored under the *Files* related list as contentversion files. With each download of a budget and each generation of a success and error log, these contentversion files are updated, while still allowing users to access previous versions.

p. If a budget record is approved/locked whereby no further edits should be made, clicking the *Upload* button will display an error message to notify users that the budget is locked from editing.

ⓘ **Admin Note:**
Validation
While processing the Excel file during upload, validation is built-in to check for:
- invalid file type, (e.g. user selects a word document)
- data entry (e.g. currency code entered in a number field),

- metadata (e.g. user renames a column header).

Users are provided the full list of validation checks in the Instructions tab.

Data Quality

If a user downloads a Budget Excel file and clears out existing data for a financial line item, then the upload process will clear information from the existing record. However, it will not delete the record.

Allocations

Allocation object enables tracking monetary amounts allocated to a project by an account or organization for a humanitarian aid activity. Three fields on Allocation object are used for this purpose:

1. Amount - A currency field to track the monetary amount of funds allocated
2. Account - A lookup field to track the organization/account that has made the allocation
3. Project - A lookup field to track the project to which the allocation has been made

Allocation object also augments the IATI reporting functionality of Amp Impact. Refer to the IATI User Guide for more detailed information.

Record Limits per Feature

ⓘ **Admin Note:**
Salesforce allows Visualforce pages (ManageFrameworks, ManageIndicators, SetTargets, AddResults, ManageDisbursements) to have a maximum view state size of 170KB. More information may be found here.

Feature	Record Limit	Processing / Loading Time
ManageIndicators (Visualforce)	10 Project Indicators and 680 Catalog Indicators when ampi__Type_of_Results__c = Aggregated, Calculated, and Input. 65 Project Indicators and 740 Catalog Indicators when ampi__Type_of_Results = Input only.[1]	1-2 mins
manageIndicators (Lightning Web Component)	800 Project Indicators, 1200 Catalog Indicators, and 200 Deactivated Indicators	1 min
ManageFramework	1,000 Project Objectives	1-2 mins
SetTargets AddResults	300 Results (per Reporting Period & Geographic Area combination within a Project)	1-2 mins
SetTargets / AddResults	STAR pages support following combinations of PGAs (PIGAs), RPs (PIRPs), Disaggregation Groups (DPIs) and PIs: 50 PIs when Project has 200 RP (2000 PIRP) and 210 PGA (1750 PIGA) 220 PI (220 DPI), 60 RP (600 PIGA), 30 PGA (250 PIGA)[2]	<1 min
Aggregated Indicators	390 Aggregated Indicators	8-12 min

[1] (a) This data load is only affected by Indicator records where Include_In_Catalog_c = TRUE.
(b) This limit applies when all the fields of Indicator and Project Indicator records are *fully populated*.
(c) Additional custom fields added to the fieldsets referenced on the ManageIndicators page may decrease the Record Limit.

[2] Factors contributing to load limits are the number of records (PI, RP, PGA, DPI, Results, etc), amount of data in fields (e.g. LongTextArea fields containing a lot of text contribute significantly view state size)

Calculated Indicators	390 Calculated Indicators	8-12 min
Submissions	250 Questions per Template 25 Sections per Template	N/A
Radar charts	8 Submissions per parent record (Recommended - limit is over 100)	N/A
Activities (AURA)	300 Activities per Implementation Plan (Recommended - limit is 6,500)	N/A
Activities (LWC)	● 50 Implementation Plans with 300 Activities each ● 4500 Activities at once. This could be: ○ Multiple Implementation Plans with total 4500 Activites displayed simultaneously in the Activities table ○ Single Implementation Plan with total 4500 Activities displayed in the Activities table	< 1 min
Disbursements	1,000 Disbursements	1-2 mins
Budget Excel	2,000 Financials (with 12 columns) 1,800 Financials (with 25 columns)	1-2 mins
IATI Reporting	20 Projects with with the following child records (in total): ● Reporting Period - 20 ● Organization Role - 20 ● Project Role - 20 ● Project Geographic Area - 60 ● Project IATI Sector - 20 ● Project IATI Policy - 20 ● Budget - 200 ● Transaction (Disbursement and Financial) - 11,000 ● Transaction Project IATI Sector - 1400 (for both Disbursement and Financial) ● Project objective - 200 ● Project Indicator - 2000	5-8 min

Reports and Data Visualization

In addition to the Performance Graphs page, which offers quick insight into a project's performance per indicator, Amp Impact includes the following sample reports to get users started with data analytics and visualizations. All of these reports are saved and accessible though the "Amp Reports" folder in the Reports tab.

1. *Disaggregated Targets vs Results*
   This is a sample report with summed Targets and Results reported per project indicator, sliced by disaggregation groups (if applicable). Filters can be added to track only indicators within a single project, reporting period, and/or geographic area.

2. *Objective with Project Indicators*
   This is a sample report filtered by a single Project and a single Objective to display related Project Indicators, Targets, and Results reported to date. This report can be cloned with adjusted filters for each Objective, so that an organization can track their progress towards any Objective in a Project.

3. *Targets vs Results (Num + Currency)*
   This is a sample report to display total Target and Result values reported for numeric & currency project indicators across projects, reporting periods, and geographic areas. Filters can be added to track only numeric and currency indicators within a single project, reporting period, and/or geographic area. This report is included as a component in the Home page for Amp Impact in Lightning Experience.

4. *Targets vs Results (Percent)*
   This is a sample report to display average Target and Result values for percent project indicators across projects, reporting periods, and geographic areas. Filters can be added to track only percent indicators within a single project, reporting period, and/or geographic area. This report is included as a component in the Home page for Amp Impact in Lightning Experience.

5. *Deactivated Indicators Historical Data*

   This is a sample report to display the targets and results data from all project indicators that have been deactivated. Since these project indicators are no longer displayed on any of Amp Impact's Visualforce pages, this report provides an easy way for users to access historic data that may have been collected when these project indicators were active.

6. *Results v Targets by Area over Time*

   This is a sample report to track an indicators' progress by Geographic Area and by Reporting Period for all Projects. This report is displayed as a report chart on the Indicator Lightning Record Page to visualize indicator-level progress across geographies and over time.

7. *Results v Targets by Project over Time*

   This is a sample report to track an indicators' progress by Project and by Reporting Period. This report is displayed as a report chart on the Indicator Lightning Record Page to visualize indicator-level progress across projects and over time.

8. *Risks by Type and Status*

   This is a sample report to track the type and status of Risks for a Project. This report is displayed as a report chart on the Risk tab of Project Record Page to visualize the status of all the Risks associated.

9. *Risk Occurred by Project and Status*

   This is a sample report to track the actual impact created by Risks for a Project. This report is displayed as a report chart on the Risk tab of Project Record Page to visualize the number of Risks occured with their actual impact.

10. *Risks by Status*

    This is a sample report to track the status of Risks for a Risk Register. This report is displayed as a report chart on the Risk Register Record Page to visualize the status of Risks associated.