

AMP User Manual

Desktop Tabs

The tab concept is used in various places within AMP to allow information to be grouped in various ways. Desktop Tabs allow you to locate your projects quickly for viewing and/or editing. The tabs organize projects based on a pre-defined criterion that you set when creating your tabs.

It is worth noting here that Desktop Tabs are fully customizable and may vary from user to user, since each user may determine the tabs that will appear in a grouping that is useful for the user. This is important to note, because on your first use of AMP, you will need to create tabs in order to see projects entered. If you do not create any tabs, then no data will show when you log in to AMP and choose your workspace.

Although you may create an unlimited amount of Desktop Tabs for your workspace, there is a limit on how many will show on the Desktop Homepage at one time. The Desktop Homepage will allow six (6) tabs to appear at one time – five (5) custom created tabs, one (1) tab to allow you to view the other custom tabs as a drop down.



If you have more than five (5) tabs, the additional tabs will appear by clicking the **More Tabs** tab.

Figure 1 – More Tabs option in AMP

Another useful feature of Desktop Tabs is the ability to add characteristics about the project, so that it is easier for you to find your project. When creating your tabs, you may include five (5) columns – three (3) qualitative and two (2) quantitative columns (or measures). If you attempt to add more than the specified amount for qualitative or quantitative columns, you will receive an error message from AMP.

Creating Desktop Tabs

Now that we have completed an overview of what Desktop Tabs are and how to use them, you are ready to create your own custom tabs. Go to the submenu of My Desktop and click Add Tab. When you click this link, the Tab Generator opens.

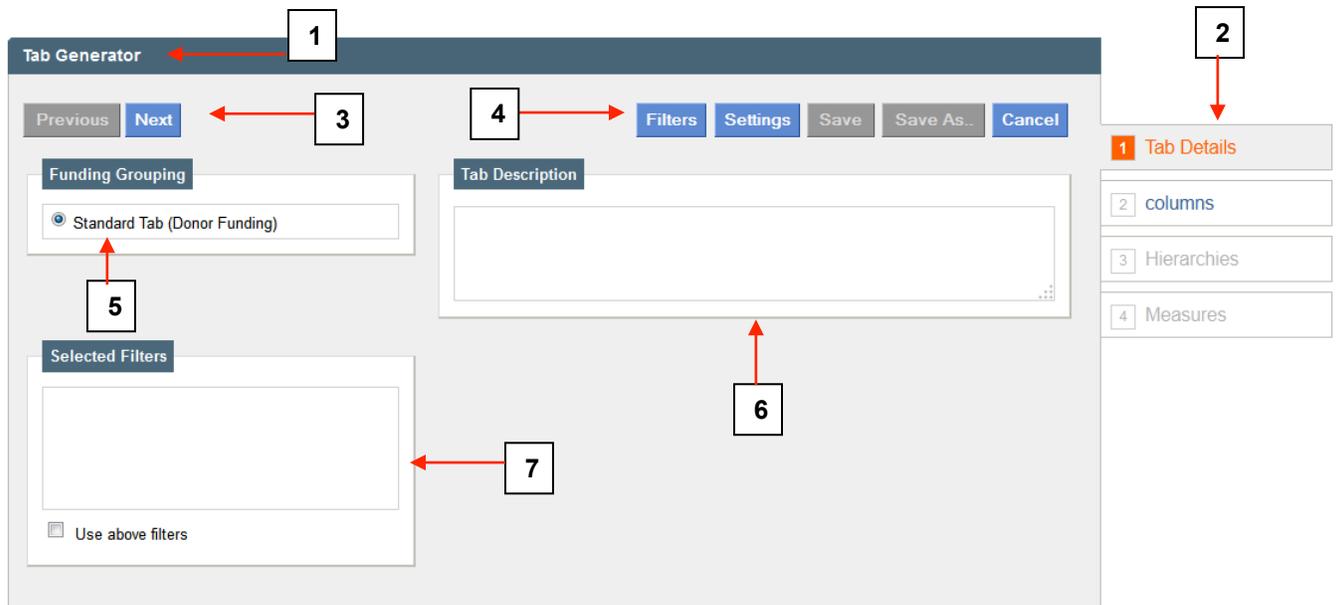


Figure 2 – Tab Generator used by AMP to create Desktop Tabs

1. Denotes the generator you are using
2. The navigation tabs used when creating a custom tab. The currently selected tab appears in a dark color, the tabs that are available to be clicked on appear in blue and tabs that are not activated appear in gray until they become active.
3. The controls available for navigating the custom tab
 - a) **Previous** takes you to the previous tab customization page
 - b) **Next** takes you to the next tab customization page
4. The (other) controls available for navigating the custom tab
 - a) **Filters** allows you to customize the data displayed by choosing to base the projects show on a certain criteria
 - b) **Settings** allow you to choose how you would like your numbers to be formatted and will show you an example of how the formatting you chose will look. The other settings let you set the currency to be used and the calendar that should be used.
 - c) **Save** allows you the save the tab
 - d) **Save As** allows you to save the tab as another name. This is quite useful if you need to create a tab similar to one that you have already created with just a few modifications. You can open the tab in edit mode, make the modifications and click Save As – this allows your original tab to remain and creates a new one with the new name you specify.
 - e) **Cancel** closes the tab generator without saving any of your changes
5. Funding Grouping allows you to choose the type of tab you want to create based on how the funding is grouped. You will only see additional options if they are used in the activity form.

6. Add a description of the type of tab being created. This is a section to make notes or thoughts about the tab, and it is not shown anywhere else in the system.
7. If the tab is created with filters, the filters that this tab is based on will appear in this section automatically. Filters are not editable in this section (view only). To edit a filter, select the filter option in the tab control menu, edit the filter as needed and save the filter with the new edits.

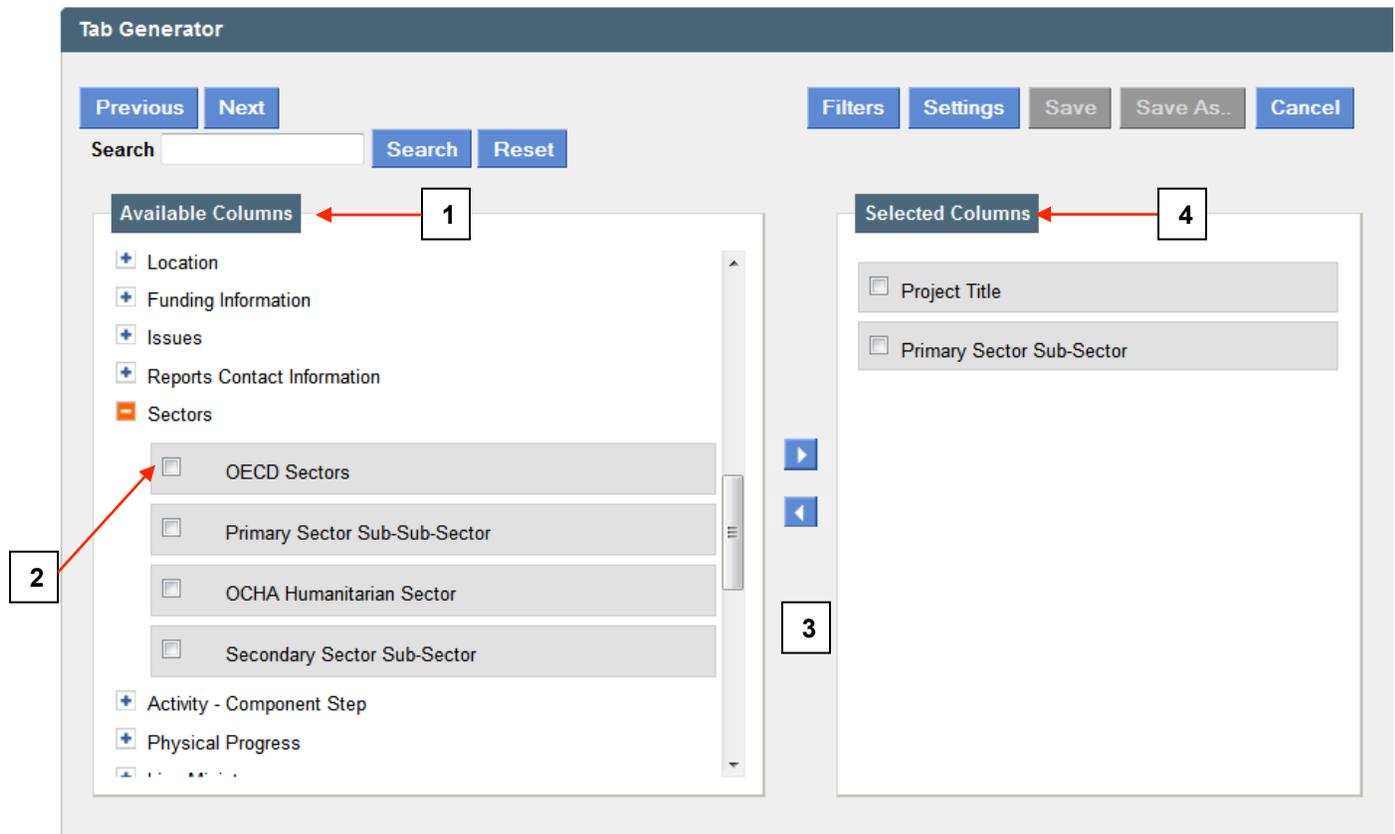


Figure 3 - Adding columns to the Tab Generator

1. **Available Columns** will show you all of the columns that you may select from as you choose what information to use to create your tab. You can select up to three items to show in the columns. When creating columns, you can choose any of the available columns to create your tab. However, as a rule of thumb it is normally advisable to have the Project Title as the first column of your tab so that you can identify your projects easily. The other columns should be characteristics of the project that make it possible for you to quickly identify the project.
2. To relocate select your desired columns, you can check all of the tabs you wish to select and then use the arrow controls noted in 3 to move them to the

- Selected Columns section.** If you want to remove a selection, again click the field and use the arrows to move it back.
3. The directional arrows allow you to place columns from one section to the other. The right arrow places columns from the Available Columns section to the Selected Columns section and the left arrow places columns from the Selected Columns section to the Available Columns section. AMP also has drag and drop capability. So, instead of checking the columns you wish to include, you can add and subtract columns by clicking and holding on the column name and dragging it to the appropriate section.
 4. **Selected Columns** will show you all of the columns you have selected to be a part of your tab.

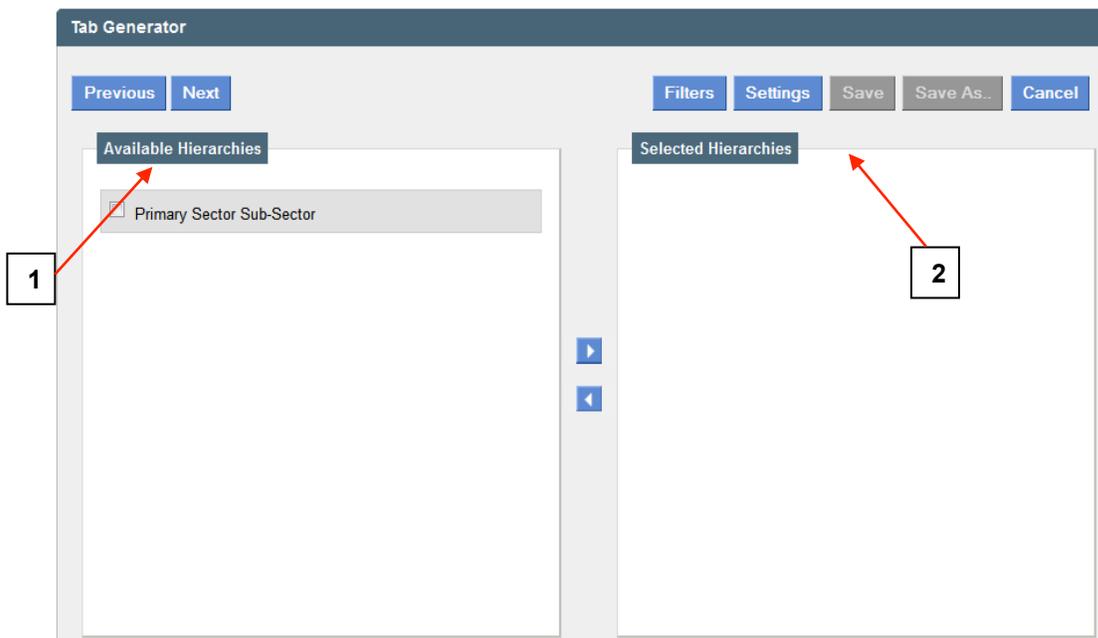


Figure 4 - Creating Hierarchies in the Tab Generator

1. **Available Hierarchies** shows you which columns of the ones you selected are available to be used as a hierarchy.
2. **Selected Hierarchies** shows the hierarchies (if any) you selected for your custom tab.

When you select a hierarchy it groups information together based on the hierarchy you choose. For example, in the diagram above, if we choose Sector as our hierarchy, it will group all of our projects under the sector associated with the project. So to locate projects we would first select the sector and then look for the project.

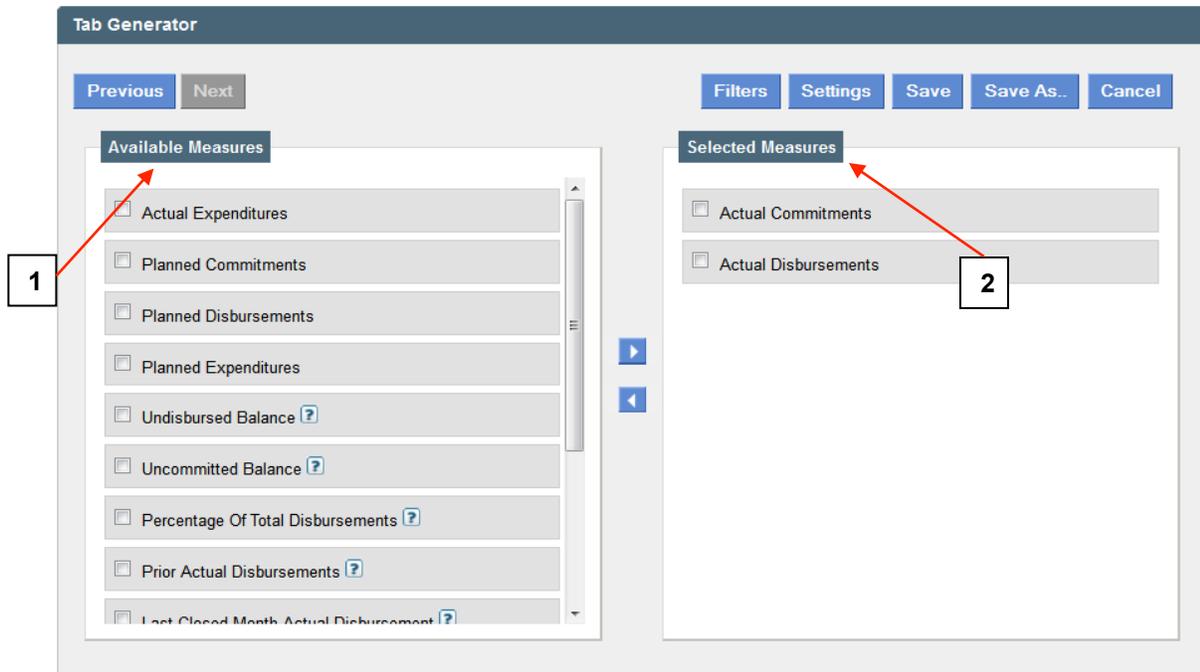


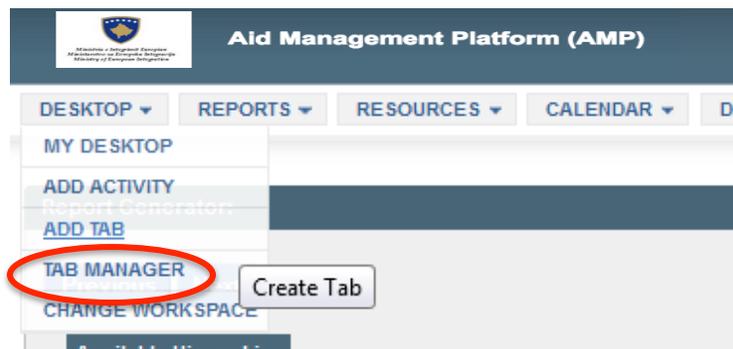
Figure 5 – Adding Measures to the Tab Generator

1. **Available Measures** shows you all of the funding measures that can be added to your tab. AMP currently requires that your tab have at least one and no more than two measures. For a definition of measures see the glossary.
2. **Selected Measures** shows you the measures that you have selected to be a part of your tab.

Once you have stepped through the steps and added the columns, measures and any filters and hierarchies you want for your tab, click Save and name the tab. Once the tab is saved, it will appear in your list of tabs.

Ordering and Managing Desktop Tabs

The next step is to order your desktop tabs to choose which five appear on your Desktop Homepage by default and which appear in the More Tabs dropdown. To order your tabs, click Tab Manager on the submenu of My Desktop.



Not filtered Tab
 Filtered Tab
 Edit Tab
 Delete Tab

	<u>Tab Title</u>	<u>Owner</u>	<u>Creation date</u>	<u>Hierarchies</u>	<u>Fields</u>	<u>Position</u>	<u>Action</u>
<input checked="" type="checkbox"/>	DEV - par Modalite et Sec...	Eben Ezer SAINVILUS	12/07/2012	<ul style="list-style-type: none"> Aid Modality OECD Sectors 	[Columns] [Measures]	activate	
<input type="checkbox"/>	ENG-VERS - BM/MONTANT PRO...	Jean Molière JOSEPH	10/11/2011	<ul style="list-style-type: none"> OECD Sectors 	[Columns] [Measures]	2 ▾	 
<input checked="" type="checkbox"/>	HUM - par Modalite et Sec...	Eben Ezer SAINVILUS	06/06/2012	<ul style="list-style-type: none"> Aid Modality OCHA Humanitarian Sector 	[Columns] [Measures]	activate	
<input checked="" type="checkbox"/>	Liste des activités	Eben Ezer SAINVILUS	06/06/2012		[Columns] [Measures]	1 ▾	

Figure 6 – Main page for Desktop Tabs

Position in the menu allows the Tab ordering option that lets you choose the top five tabs that will appear on your desktop homepage.

When you click on **Activate** you have the option to choose the tab positions for the tabs you have created which you want to appear on your Desktop Homepage. You may change this as often as needed. Once your selection is made, click Save and the ordering will appear when you go back to your Desktop Homepage. In our example we only have two tabs created, therefore only two locations are occupied.

Once you complete the setup of your Desktop Tabs, you will now have tabs on your Desktop Homepage that will allow you to quickly locate your projects.

Filtering Options within Desktop Tabs

AMP's tab feature for the desktop has additional capabilities that you may find useful when trying to find projects or you desire to filter certain projects that appear within the tab. The filtering options of AMP are a powerful tool for viewing and organizing your data in a specific format without having to create another tab.

The submenu bar within the desktop tabs offers additional options for displaying information within the tab.

- **Filters** allows you to filter the information displayed in the tab (this is in addition to any filters applied when the tab was created)
- **Save** is a useful tool for saving a tab that you have applied filters to. It allows you to save the tab without having to open the Tab Generator to recreate it with the modifications you have applied to it.
- **Settings** you to define specific settings used by the Desktop Tab
- **Applied filters** will show you the filters that have been applied to create this tab
- On the right-hand side of **Applied Filters** option, you will see the currency that amounts are shown in.