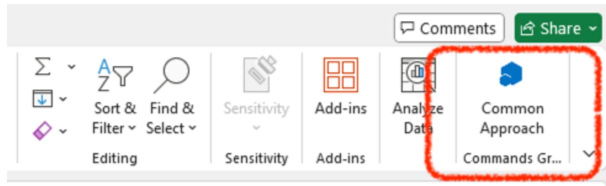
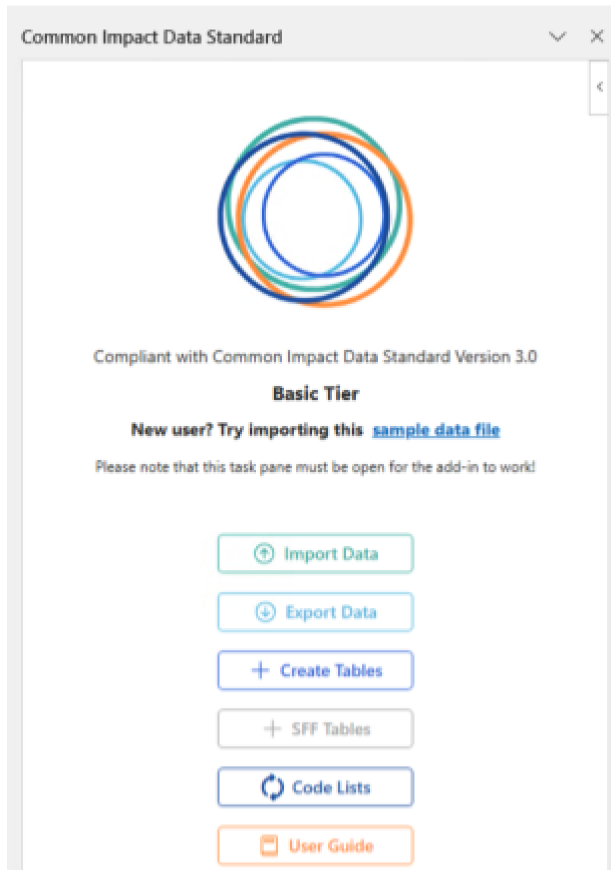
Quick Start Guide

Common Impact Data Standard:
Basic Tier Add-In for Microsoft Excel

To begin, open the Add-in from the task bar:



1. **Click "+ Create Tables"**. This creates empty tables/tabs in your Excel Workbook for the Basic Tier schema of the Common Impact Data Standard.
    a. To create the Social Finance Fund Companion Module tables, click **"+ SFF Tables"**. These tables and fields are only required for participants in the Social Finance Fund.
2. **Download a sample data file—either the Basic Tier, or the extended version with SFF fields, depending on your choice at step 1**.
3. **Click "↑ Import Data"** and select the sample data file to see how the fields in the workbook can be filled, and how tables are linked together with lookup fields.
4. **Click "↓ Export Data"** and provide a name for the exported data file. A JSON-LD file will download to your device.



These steps are enough to give a general sense of what the Add-in can do. Now you can edit data in imported files and/or merge multiple JSON-LD files into one workbook and exported file.

You can view the exported file contents as plain text with a text editor (like NotePad or TextEdit), with a web browser, with a code editor like VS Code, or with the Airtable Extension that is similar to this Add-in for Excel.

User Guide

Common Impact Data Standard - Basic Tier
Add-In for Excel

What is this Add-in?

This Add-in is a utility for transforming information about an organization's impact into a JSON-LD file that can be shared and aggregated with similar files from other organizations.

The Add-In can:

- Export a file containing the impact data that has been entered into an Excel workbook in the specified table structure.
- Import impact data files created by other Add-In users, and other software aligned at the Basic Tier of the Common Impact Data Standard.
- Optionally add, import, and export additional data classes and properties required for organizations to meet the reporting requirements for Canada's Social Finance Fund.
- For more information on using this Add-In for the Social Finance Fund, please contact Common Approach.

Who should use this Add-In?

There are two intended users for this Add-In:

1. Social Purpose Organizations (SPOs), who will use the Add-in with Excel to collect and then export their impact report data in the Common Impact Data Standard JSON-LD file format.
2. Data Aggregators (e.g. funders, investors, networks), who will use the Add-In to collect and view the contents of multiple JSON-LD files and who may also use the Add-In to export their own summary JSON-LD files.

For both of these types of users, this Add-In is presented as a low-cost, low-barrier tool for organizations that need to send or receive impact data in the Common Impact Data Standard JSON-LD format at the Basic Tier of alignment and for whom the other aligned software options for managing JSON-LD imports or exports are not preferred.

This Add-In is not intended to be an all-in-one impact measurement tool. It should be used in conjunction with other software for managing and analyzing impact data, e.g. Google Sheets, Power BI, a CRM product, another Excel workbook, another non-aligned database, or other software products to collect and analyze data.

This Add-In assumes that the user has an existing and fairly well-defined understanding of how their organization's activities result in impact and that the organization's measurement practices meet the minimum standard described by the Common Foundations standard.

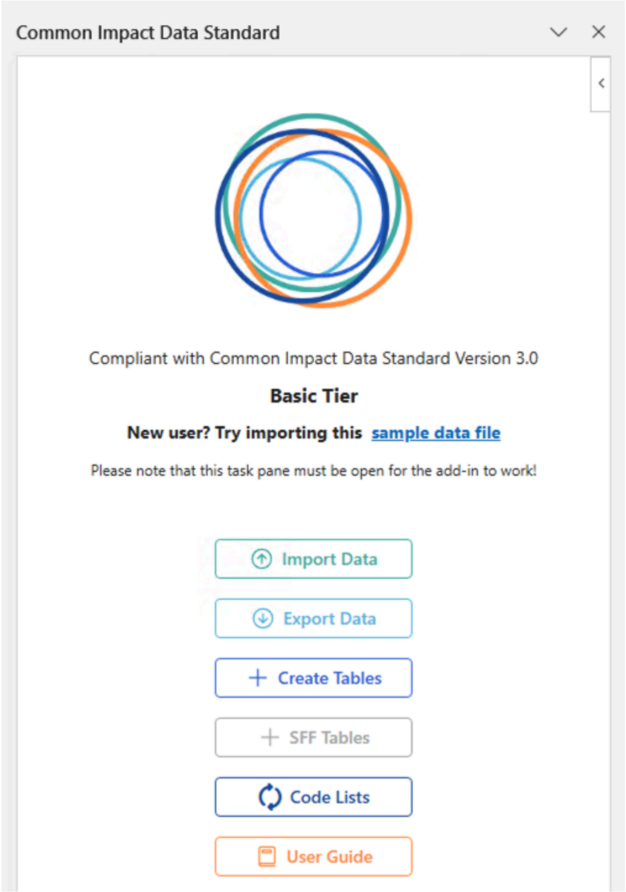
This Add-In provides an import/export utility for working with the JSON-LD file format of the Common Impact Data Standard and the optional SFF Companion Module. The Add-In is intended to complement the use of other software and is not presented as a standalone alternative for software that:

- Collects, summarizes, or analyzes 'raw' impact data, e.g. a set of survey responses
- Manages data of Classes or Properties at the Essential Tier or higher of the Common Impact Data Standard e.g. Stakeholders, Impact Risk, Impact Model, and so on.
- Produces visualizations, live dashboards, or other sophisticated analyses.
- Manages large-scale, complex, or automated data imports or integrations; the Add-In offers the JSON-LD import function and otherwise offers only the tools and methods that are built into Excel by default.
- Offers consulting support to accompany the use of the product. The Excel Add-In is offered on an "as-is" basis.

Where any of the above-noted features, functionality, or support are required for an organization and/or its intended use of the Common Impact Data Standard, using another aligned software option is recommended.

How does the Add-In work

Using the Add-In functions



Import Data

Press the "Import data" button to import data from a Common Impact Data Standard JSON-LD source.

Select a file from the file browser. To test this function, users may download a sample data file.

The contents of this file can be viewed with any plain-text editor e.g. NotePad, TextEdit.

Upon successful import, the message appears "Success! Data imported successfully". The imported data appears in tables created by the Add-In.

Export Data

Press the “Export Data” button. Enter a name for the file (potentially the name of the Organization or Program represented). The JSON-LD file is downloaded to your local computer.

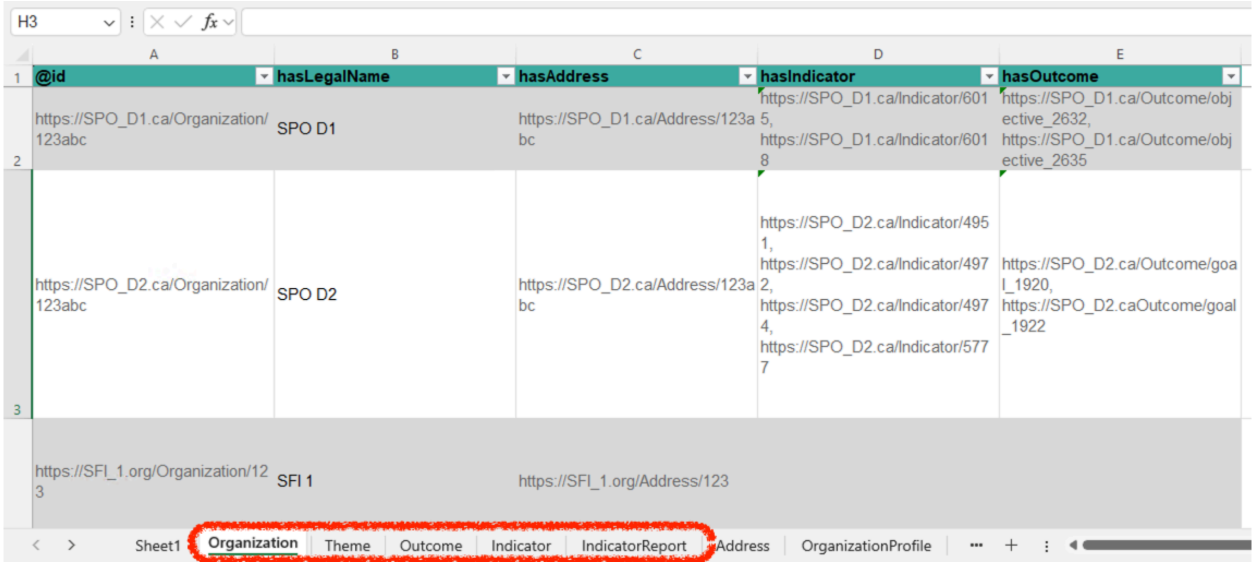
Workbooks with additional tables and columns

Users may add unlimited other Classes (tables) and Properties (columns) to their Excel workbook, but data from these additional tabs and columns will not be included in the JSON-LD files exported by the Add-In.

Create Tables

Clicking on the “Create Tables” button creates an empty set of tables in an Excel workbook.

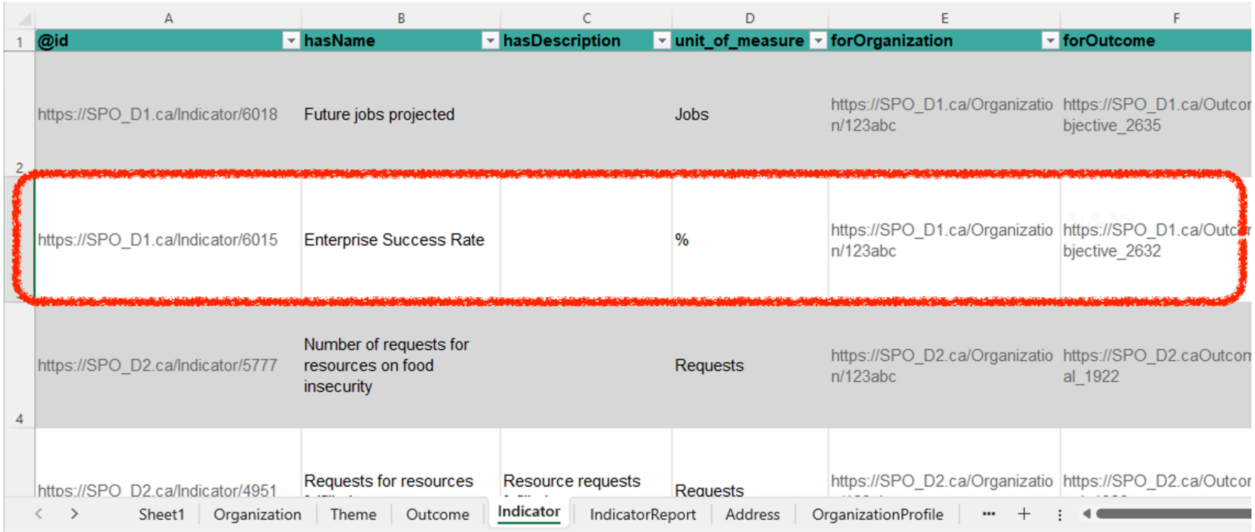
The Add-In creates one table for each Class in the Basic Tier of the Common Impact Data Standard: Organization, Theme, Outcome, Indicator, IndicatorReport, and Address.



Users should not change the names of the tables and columns created by the Add-In. Doing so may cause imports or exports to fail or produce unexpected results.

Each column in a tab represents a Property of that Class, e.g. Indicators have a unique identifier (@id), a name (hasName), a description (hasDescription), links to Outcomes (forOutcome), and so on, identified on each column heading. Descriptions of classes and properties are below, and in the [Common Impact Data Standard documentation](#).

Each row in a tab represents an instance of that Class; e.g. the Indicators tab will include one Indicator per row. An Excel workbook can hold many instances of each Class. Every instance must have its own unique identifier; this is also described in more detail below.



Importing and Exporting Code List Data

Code lists in the workbook (visible on the tabs for Sector and PopulationServed) can be updated/refreshed by clicking on the “Code Lists” button. The refreshes the tables from their source at [codelist.commonapproach.org](#).

The Add-In only imports and exports the reference (the @id) for the code list items referenced by the OrganizationProfile instance or other similar classes. The entire instance of the code list item is not imported/exported in JSON-LD files because the code list items are publicly defined.

For the import process, any code lists that aren’t intended to be modified are always fetched from the code list server, and code list items present in the JSON file will be ignored. For code lists that can be modified, we handle importing and exporting as we would with any other class.

Warning Messages

Users should not change the names of the tables and columns that are created by the Add-In. This may cause imports or exports to fail or produce unexpected results.

Warning messages will not prevent the user from importing or exporting a file. They simply notify the user about the condition of the data.

The Add-In will provide warnings when:

- There are missing links between objects e.g.:
    - Indicator not linked to Organization, or vice versa
    - Indicator not linked to Outcome, or vice versa
    - Outcome not linked to Organization, or vice versa
    - Outcome not linked to Theme, or vice versa
    - Indicator not linked to IndicatorReport, or vice versa
- There are empty data fields in objects e.g. with no Descriptions or other empty text fields
- There are duplicate Name fields within one Object type (e.g. two indicators with the same hasName value)
- The workbook contains data other than the tables and columns created by the Add-In.

Failure Messages

Users should not change the names of the tables and columns that are created by the Add-In. This may cause imports or exports to fail or produce unexpected results.

The Add-In will fail to import or export data, and an error message will be provided under the following conditions:

- Duplicate URI (@id) fields on any two rows in any Class (tab) in the file or workbook
- Missing or invalid URI (@id) fields on any rows in any Class (tab) in the file or workbook
- Column names have been changed from starting values (may result in failure, or in new/duplicate columns being created)

Entering your own impact data to Excel

This section describes how to use each Class (table) and Property (column) created by the Add-In and whether there are any particular formatting or syntax rules to follow.

Lookup fields update automatically

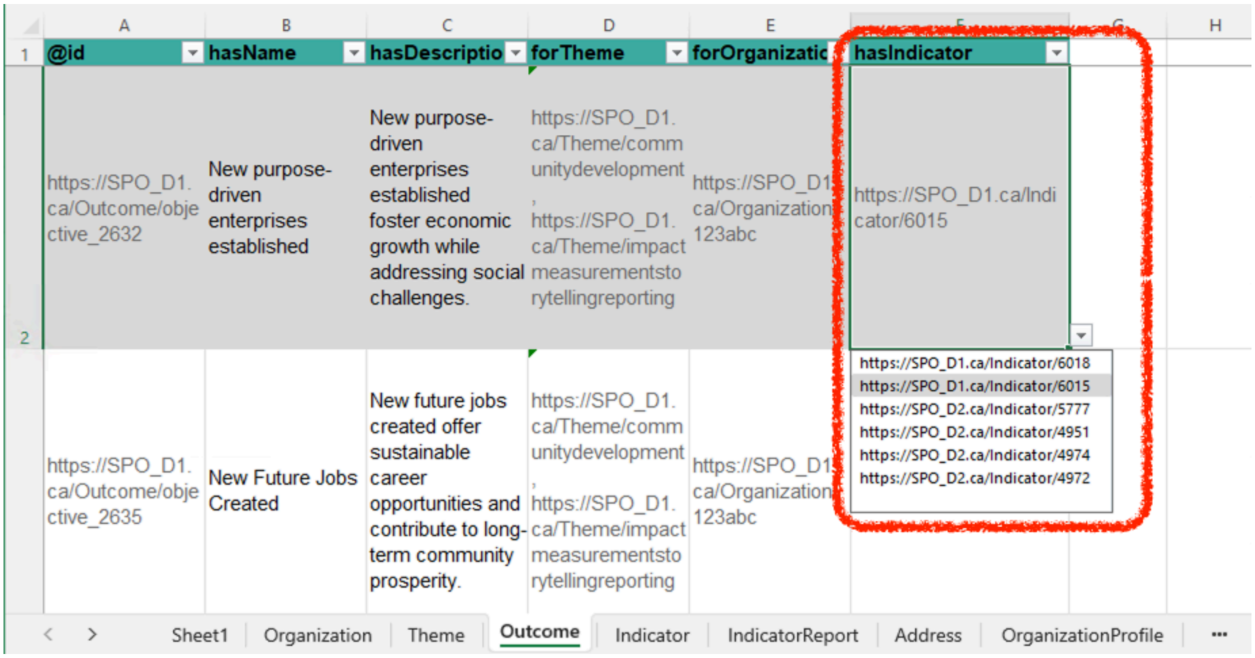
The 🔗 emoji in the lists below identifies data fields (columns) that link between tables. These fields contain Lookup values that update automatically in Airtable. For example: when an Indicator is linked to an Outcome by editing the “hasIndicator” field on the Outcome tab, a link automatically appears in the “forOutcome” field of the related record on the Indicator tab.

Methods for entering data

This guide assumes that users will decide for themselves how best to enter data into their workbook and maintain it, whether that is by direct entry, copy/paste, CSV upload, or other integration options that are provided by Excel. Common Approach does not offer any specific support or guidance for how to enter data other than the guidelines below about the required formats for certain data fields.

Links between tabs

The Excel Add-in establishes links between tables for fields denoted with the 🔗 emoji in the section below. Lookup fields (for example the "hasIndicator" column on "Outcome" tab) have a dropdown menu to select indicators



from the "Indicator" tab, listed by their @id property.

Common Impact Data Standard: Tiers of alignment

This Add-In creates all the classes and properties associated with the Basic Tier of alignment to the Common Impact Data Standard, as well as some additional properties for some classes (e.g. forOrganization in the Indicator and Outcome classes) that make workbooks a little easier to use.

See the alignment checklist for more information about the classes and properties included at higher tiers of alignment.

Please contact Common Approach for the full reference for Social Finance Fund classes and properties and their use.

Basic Tier classes and properties

@id: the unique identifier

Every row in every tab created by the Add-In starts with a column labelled "@id". Each entry in the @id column holds a Unique Resource Identifier (URI) for the set of values in that row. In the language of the Common Data Standard, it is a unique identifier for an instance of a Class.

Every @id value must be globally unique, with no exceptions allowed. This means it should be unique not just within one report or document but across every use of the @id value for every report, for every organization, everywhere.

Writing your own unique @id tags

Usually the @id value is automatically generated by software. If you are manually entering data to Excel you may need to write your own.

The convention for @id values combines four elements:

https:// url_of_spo / type / name(uuid)

> **https://** The URL should start with "https" and not "http".
>
> **url_of_spo:** a real registered domain name belonging to the organization publishing the report, or taking responsibility for generating and sharing the report contents on behalf of the organization. The URL should eventually be capable of directing queries to a database containing the report data, given the end goal of the standard to facilitate linked data. This element of the id URL should stay consistent for all reports from the organization.
>
> **type:** the class type for the instance that the URI refers to e.g. Organization, Outcome, Indicator, etc.
>
> **name:** a version 2 uuid, for example "4fdf5fae-d591-4331-ba5e-ac90befbb32c". See https://en.wikipedia.org/wiki/Universally_unique_identifier for more information.

An example of an @id value:

https://www.zerokits.org/IndicatorReport/4fdf5fae-d591-4331-ba5e-ac90befbb32c

Unique identifiers for Themes from existing standards

In some cases, Themes or other classes may already be defined by an existing published standard.

For example, at https://codelist.commonapproach.org/ there is a published list of IRIS+ metrics and themes. To use these in place of locally-defined Themes, use the URIs and associated properties given in the published lists.

Organization

Reminder: The 🔗 emoji denotes a lookup field that automatically updates to show links between records.

@id: see @id: the unique identifier at the start of this section

hasLegalName: The name of the entity that is the subject of the impact report. Does <u>not</u> have to be the legal name of the parent organization for a report for a single program, <u>nor</u> the name of only one member of a report for a multi-organization collaboration.

🔗 hasIndicator: This field automatically populates the @id values for Indicators associated with the Organization, as specified in the @id column on the Indicators tab.

🔗 hasOutcome: This field automatically populates the @id values for Outcomes associated with the Organization, as specified in the @id column on the Outcomes tab.

Theme

@id: see @id: the unique identifier at the start of this section

hasName: Enter a name for the theme e.g. “SDG 11” or “Green Economy”

🔗 hasOutcome: This field automatically populates the @id values for Outcomes associated with the Theme, as specified in the @id column on the Outcomes tab.

Outcome

@id: see @id: the unique identifier at the start of this section

hasName: Enter a name for the Outcome.

hasDescription: Enter a description of the Outcome.

🔗 forTheme: This field presents a “pick list” that allows the user to choose one or more Themes that have been entered on the Themes tab.

🔗 hasIndicator: This field presents a “pick list” that allows the user to choose one or more Indicators that have been entered on the Indicators tab. It also automatically populates with indicators when this outcome has been selected in the forOutcome field of a record on the Indicators tab.

🔗 forOrganization: This field presents a “pick list” that allows the user to choose one or more Organizations that have been entered on the Organizations tab.

Indicator

@id: see @id: the unique identifier at the start of this section

hasName: Enter a name for the Indicator.

hasDescription: Enter a description of the Indicator. Consider including the units of measure for the related indicator report values.

🔗 forOutcome: This field presents a “pick list” that allows the user to choose one or more Outcomes that have been entered on the Outcomes tab. It also automatically populates with Outcomes when this Indicator has been selected in the hasIndicator field of a record on the Outcomes tab.

🔗 hasIndicatorReport: This field automatically populates with IndicatorReports when this Indicator has been selected in the forIndicator field of a record on the IndicatorReports tab.

🔗 forOrganization: This field presents a “pick list” that allows the user to choose one or more Organizations that have been entered on the Organizations tab.

IndicatorReport

@id: see @id: the unique identifier at the start of this section

hasName: Enter a name for the IndicatorReport. Consider including the timeframe of the report in the name.

i72:value: Enter a numerical value or text value.

I72:unit_of_measure: enter a text value, e.g. “people per day”, “kilograms”, “weeks from program start”, “Canadian dollars”, “rating from 1-5”, “score out of 60”.

hasComment: Enter a comment related to the IndicatorReport. Consider including relevant information like collection location, measurement method, intended analysis, baselines, more detail for units of measure, or other useful context.

🔗 forIndicator: This field presents a “pick list” that allows the user to choose one or more Indicators that have been entered on the Indicators tab. It also automatically populates with Indicators if this IndicatorReport has been selected in the hasIndicatorReport field of a record on the Indicators tab.