

Student: Besmir Dishnica  
Prof: Allen Gove  
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## Executive Summary

### **Summary**

This database is created with the intention to help University Impact Fund (UIF) in its day to day decision making process. UIF will continue to use a Google Doc Spreadsheet where it will record all the new information and data relevant to them. The data fields of this spreadsheet are aligned with Impact Reporting and Investment Standards (IRIS). I decided that it will be important for UIF to have a more sustainable and safe database, that is why I designed and developed a user-friendly Excel Database.

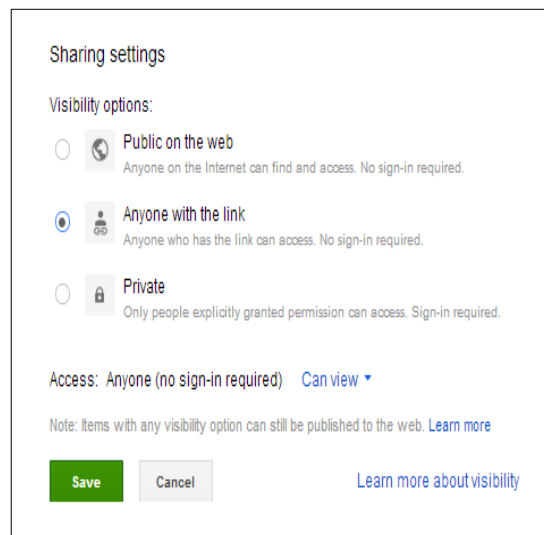
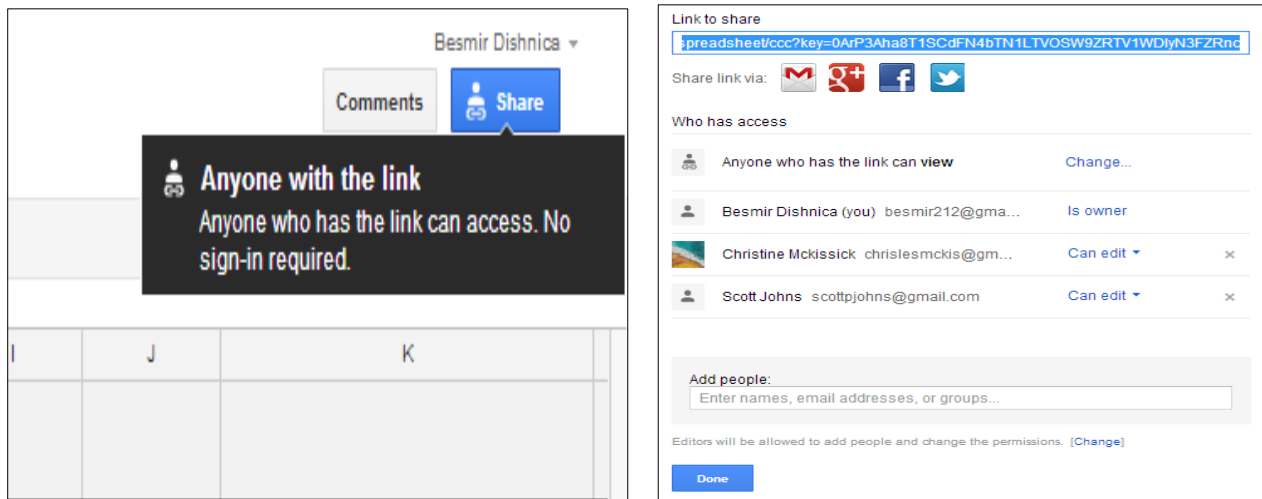
### **Project impact on UIF**

The research database will provide a sustainable foundation for future research in the impact investing space. UIF will now have a reliable, easy-to-update database and will be able to search and filter data according to its own interests. Additionally, the user guide provided to UIF will enhance the sustainability of the database by assisting the organization to maintain the database.

# User Guide

## *How to use the Excel database in seven steps*

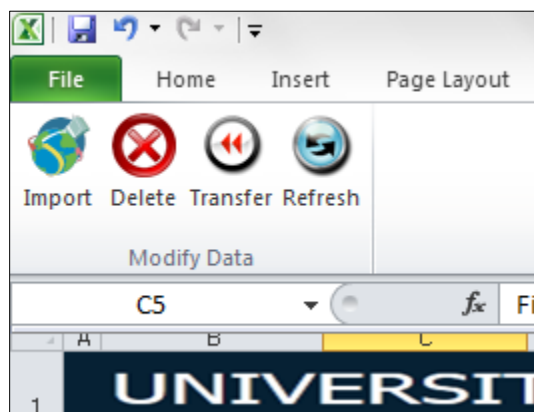
1. Adjust the Google doc settings to be available to everyone who has the link. You can enable this by clicking on the Share tab in the right-up corner of the spreadsheet as shown in the picture below. Then another table will show, where you will need to click the option Change in order to change the settings to Anyone with the link, so no sign in will be required, but in the same time it will be safe.



2. The Excel Spreadsheet has three sheets: 1) UIF Database 1) Raw Data and 2) Options

The sheet Option- contains information that change how the data will be imported. You won't need to do anything with this sheet, besides updating the Google Doc Link whenever you will change it. Please note, that you need to paste the link in the current cell (C1) in order for the data to be imported properly. To get the Google link you need to open the Google doc in a web browser and click View tab -> List then you can Copy Paste the link in cell C1.

Raw Data Sheet – the template with the Impact investing data fields is created so the data from the Google doc will be imported in the appropriate cells. To do so you will need to click the button “Upload” that is located under the UIF ribbon. See picture below.



Soon all the data from Google Doc will be in the Excel sheet and it will be safe and ready to use.

If you want to delete a field make sure that you delete it in the Google Doc as well and vice versa because the fields need to always match.

3. There is only one extra field in the Excel Sheet, which is “Status”. This field will help you in the decision making process, to keep a company for further analysis or to remove it from the database. In the Status row there is a drop down menu that allows you to select between two options: “Keep” or Remove. After investigating the company, the column Status will be the first filtering of the data. If you choose “Keep” the data will be ready to be imported to the permanent sheet called “UIF Database”.

After you have investigated some of the companies you may click the button Transfer. This button will

transfer all the data in the Raw Sheet that have “Keep” status to the permanent database called “UIF Database”.

The screenshot shows a web form with a 'Status' label and a dropdown menu. The dropdown menu is open, displaying two options: 'Keep' (which is highlighted in blue) and 'Remove'.

4. After reviewing the Raw data you might delete all the data in that sheet by clicking the button Delete. This will delete all the data in the Raw sheet. Now the sheet is ready for future uploads.
5. There are couple of things that you might do in the UIF Database sheet: 1) You can choose the status of the companies by selecting form the drop down menu under column called “Status”. You might choose “priority” or “Drop”.
6. After choosing the status you may click the button refresh and all the “Priority” Status rows will be colored with green and the Drop Status will be colored with Red.
7. Now you might sort the table however you desire

UNIVERSITY IMPACT FUND						
Organization Description					Product Description	
Name	Sector	Region	Founded	Impact Objective	Target demographic	Target Social Economic
JanaBe	Technology	Santiago, Chile	2011	Develop an audio	Rural	Low Income
		Argentina		Aims to		Low
Solar	Energy	and Brazil	2012	be a	Rural	Income

\*This is how the database should look in the end.

If you have any other question, please contact Besmir Dishnica at [besmir212@gmail.com](mailto:besmir212@gmail.com).  
I wish you all the best in your work.

## **Difficulties**

- 1) Design: It was very hard to find the best way to help the University Impact fund. I didn't have a clear idea. Also I realized that it is much better to have the design before starting coding because it takes much longer to code when the design is not clear.
- 2) Transferring data from one sheet to another. It was difficult to move the data from sheet 2 to sheet 1. Functions copy and paste were not able to do that. So I had to use two for loops to make it work.
- 3) Making it look good was challenging because there were a lot of things here and there and I needed to more than 10 times the same thing until I could get it record the thing that I needed.
- 4) Even though it might seem easy to create this project, there are many little things to take in consideration.