



Release Date: November 2019 | Version Name: Bellatrix (Fall 2019)

Our release notes offer brief, high-level descriptions of new features, enhancements and resolved issues.

Detailed information on Set-up, Configuration and Feature Information is available in the Installation Guide and User Guide for each release.

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Key Product Features

New Features

- **Generate XMLs to share your data to the IATI Registry**

Now manage your IATI-related information and data entry XML generation through Amp Impact! Meet funder reporting requirements and adhere to the International Aid Transparency Initiative by generating you Organization and Activity Standard XMLs directly from your Salesforce.

Organizations will be able to customize the following:

- Reporting Org: define standard Reporting Org details when it is the same across all IATI Activities.
- Generic Contact: define standard Contact details when it is the same across all IATI Activities and/or needs to be anonymized.

① Admin Note

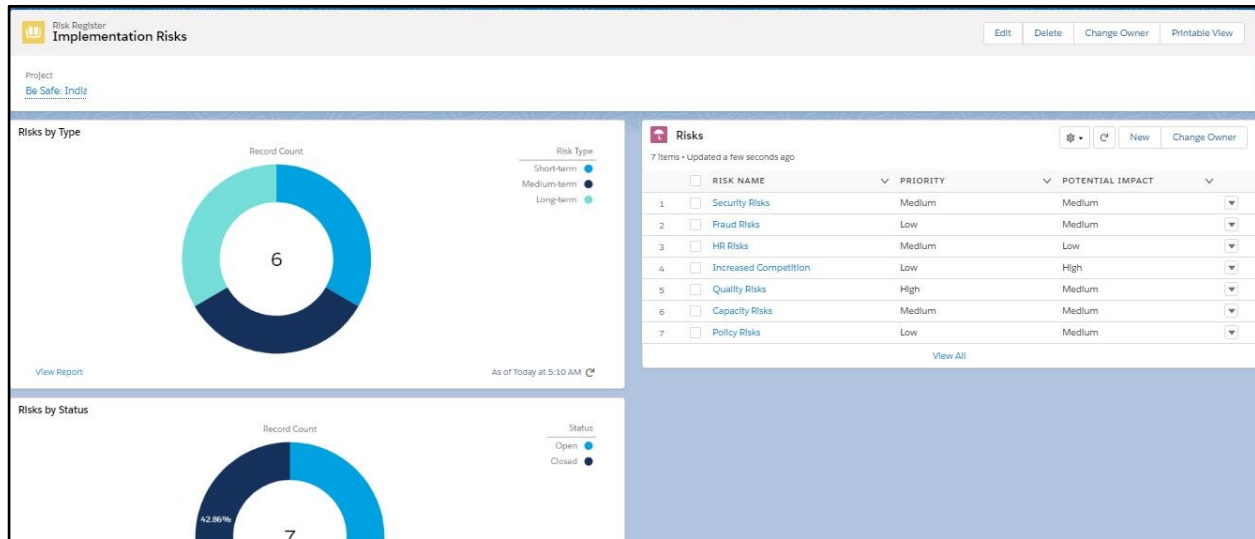
- To use the IATI feature, please reach out to your Vera POC to enable the feature for your organization.

- In this release the following types of Transactions will be supported: Incoming Funds, Outgoing Commitments, Disbursement, Expenditure, Incoming Commitment.

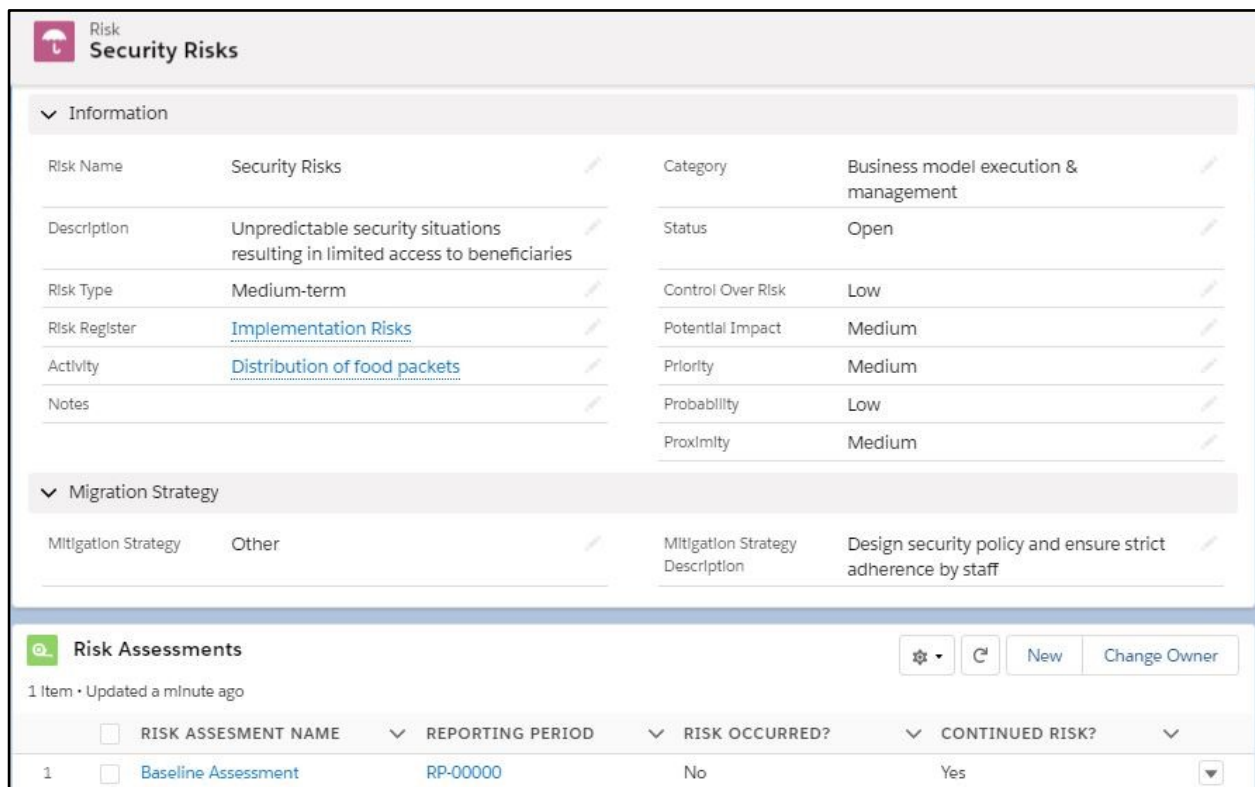
- **Risk Management: Identify, Monitor, Mitigate and Evaluate**

Now, manage any potential risks that could impede your impact:

- Identify different types of risk you may face and assess their probability and potential for impact
- Visualize this risk information and evaluate how it was managed



- Monitor these risks and assign them to individual team members and/or related to particular objectives/goals
- Determine mitigation strategies and track their completion

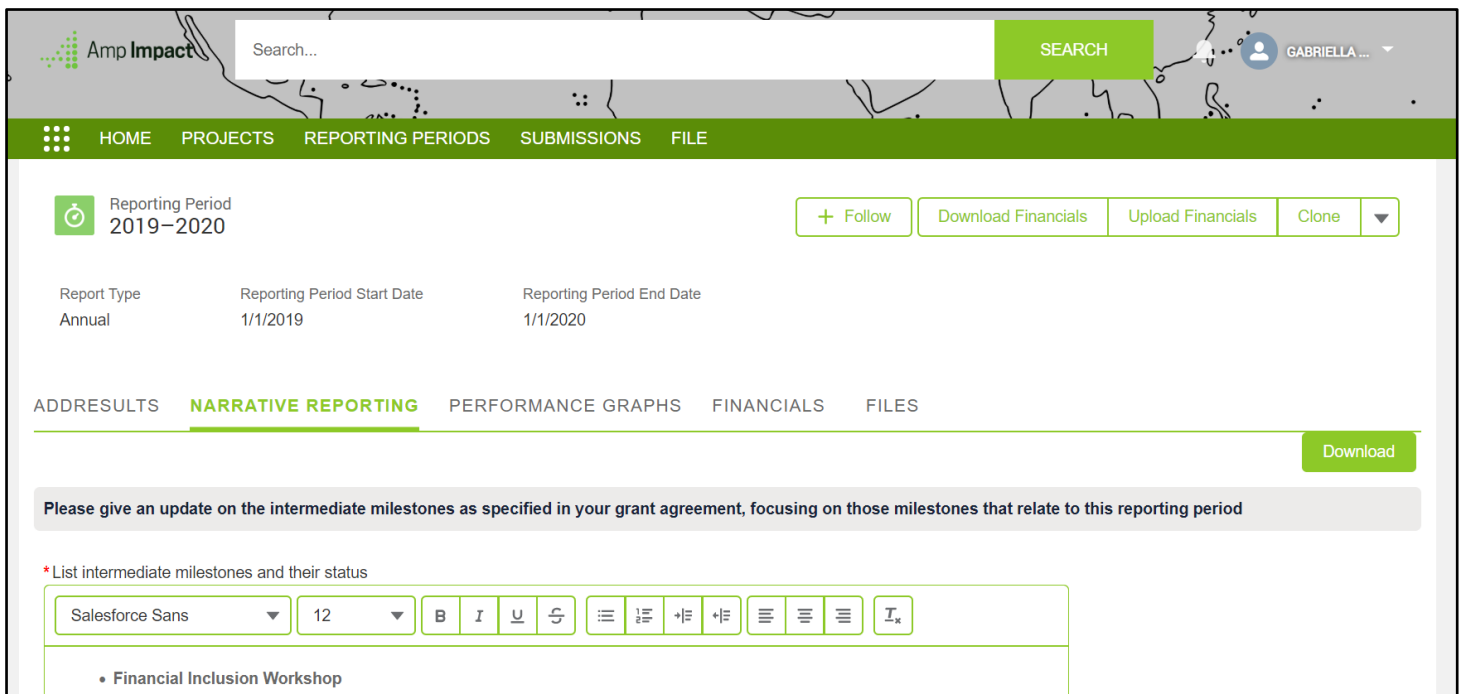


Feature Enhancements

- **Enhanced Grantee Reporting experience**

We've made enhancements to make the user experience more streamlined for grantees to report to you using Salesforce Community! Now,

- login and select the relevant reporting period
- navigate between tabs to enter indicator results, narrative reports, upload financials and files



The screenshot displays the Amp Impact reporting interface. At the top, there is a search bar and a user profile for GABRIELLA. Below this is a navigation menu with options: HOME, PROJECTS, REPORTING PERIODS, SUBMISSIONS, and FILE. The main content area shows the 'Reporting Period 2019-2020' with a 'Report Type' of 'Annual', 'Reporting Period Start Date' of '1/1/2019', and 'Reporting Period End Date' of '1/1/2020'. There are buttons for '+ Follow', 'Download Financials', 'Upload Financials', and 'Clone'. Below this is a tabbed interface with 'NARRATIVE REPORTING' selected. A 'Download' button is visible on the right. A message box states: 'Please give an update on the intermediate milestones as specified in your grant agreement, focusing on those milestones that relate to this reporting period'. Below this is a text editor with a toolbar and a list item: 'Financial Inclusion Workshop'.

- **View related data across tabs**

Within a Project record, users can toggle between tabs such as ManageFramework page and ManageIndicators page. Previously, if a user made a change on a Visualforce page that impacted data tracked on another page, navigating from one page to the second did not refresh it, and the user would have to refresh the entire Project to see the updated information.

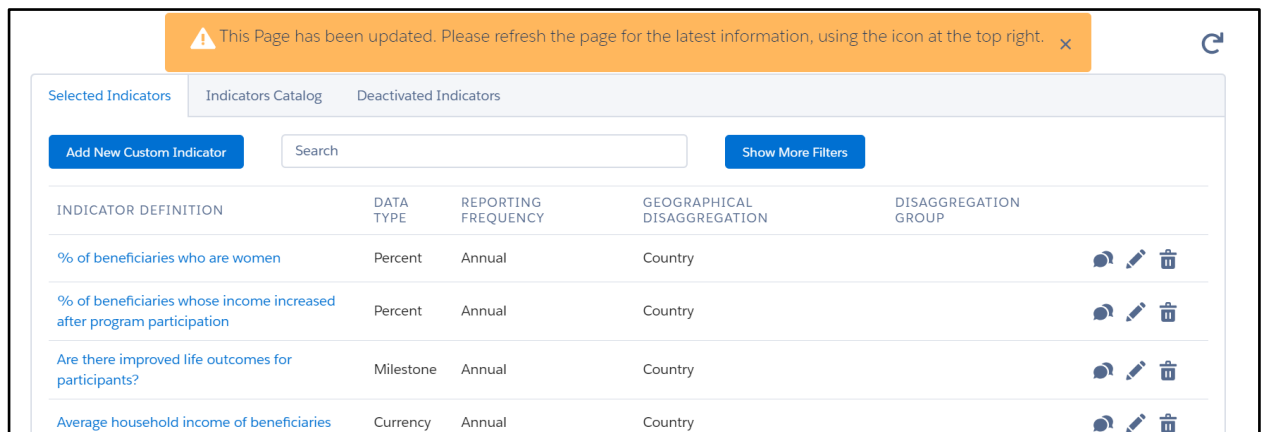
For example, if a user created a new Project Indicator associated with a Project Objective on the ManageIndicators page, they would need to refresh and then tab to ManageFrameworks page to



view the Project Indicator displayed with the relevant Project Objective (Logframe Item).

Two updates have been made:

- a. If the user is currently working on a page and another user's work on another page impacts their data, the following pop-up will display with a refresh icon.
- b. When the user clicks the refresh icon, only the current tab will refresh, so the user can more efficiently see the updated information without having to refresh the entire project.



- **Customize the user interface for all Amp Impact features**

Determine and manage which users have access to each Amp Impact page and the action(s) they can take for the following:

- Manage Framework
- Manage Indicators
- Activities
- Set Targets
- Add Results
- Financials (Manage Disbursements)

For example, on the Manage Indicators page, select

- (a) which tabs are visible

Current display

Manage Indicators

Selected Indicators | Indicators Catalog | Deactivated Indicators

[Add New Custom Indicator](#) [Show More Filters](#)

INDICATOR DEFINITION	DATA TYPE	REPORTING FREQUENCY	GEOGRAPHICAL DISAGGREGATION	DISAGGREGATION GROUP	
# Women with Savings Account	Number	Monthly	State/Province		
Test	Currency	Annual	Country	Age Group	

First Previous 1 Next Last

New display with 'Indicators Catalog' and 'Deactivated Indicators' tabs hidden for certain users

Manage Indicators

Selected Indicators

[Add New Custom Indicator](#) [Show More Filters](#)

INDICATOR DEFINITION	DATA TYPE	REPORTING FREQUENCY	GEOGRAPHICAL DISAGGREGATION	DISAGGREGATION GROUP	
# Women with Savings Account	Number	Monthly	State/Province		
Test	Currency	Annual	Country	Age Group	

First Previous 1 Next Last

(b) which buttons and icons are visible

Current display

Manage Indicators











Selected Indicators | Indicators Catalog | Deactivated Indicators

[Add New Custom Indicator](#) [Show More Filters](#)









INDICATOR DEFINITION	DATA TYPE	REPORTING FREQUENCY	GEOGRAPHICAL DISAGGREGATION	DISAGGREGATION GROUP	
# Women with Savings Account	Number	Monthly	State/Province		
Test	Currency	Annual	Country	Age Group	

First Previous 1 Next Last

New display with 'Add New Custom Indicator' button not accessible for certain users

Selected Indicators				
Indicators Catalog				
Deactivated Indicators				
Search <input type="text"/>				
Show More Filters				
INDICATOR DEFINITION	DATA TYPE	REPORTING FREQUENCY	GEOGRAPHICAL DISAGGREGATION	DISAGGREGATION GROUP
# Women with Savings Account	Number	Monthly	State/Province	    
Test	Currency	Annual	Country	    
First Previous 1 Next Last				

New display with 'Edit' icon not accessible for certain users

Selected Indicators				
Indicators Catalog				
Deactivated Indicators				
Add New Custom Indicator				
Search <input type="text"/>				
Show More Filters				
INDICATOR DEFINITION	DATA TYPE	REPORTING FREQUENCY	GEOGRAPHICAL DISAGGREGATION	DISAGGREGATION GROUP
# Women with Savings Account	Number	Monthly	State/Province	   
Test	Currency	Annual	Country	   
First Previous 1 Next Last				

- **Search and Filter while Managing Indicators and Entering Targets/Results**

Customize the list of filters displayed on the:

- Selected Indicators and Deactivated Indicators tabs on Manage Indicators
- Set Targets page
- Add Results page

① Admin Note

Manage the fields displayed in the filters using these field sets:

(on the `ampi__Project_Indicator__c` object)

- PROJECT_INDICATORS_SEARCH_FILTERS
- ST_SEARCH_FILTERS
- AR_SEARCH_FILTERS

(on the `ampi__Indicator__c` object)

- INDICATOR_CATALOG_SEARCH_FILTER

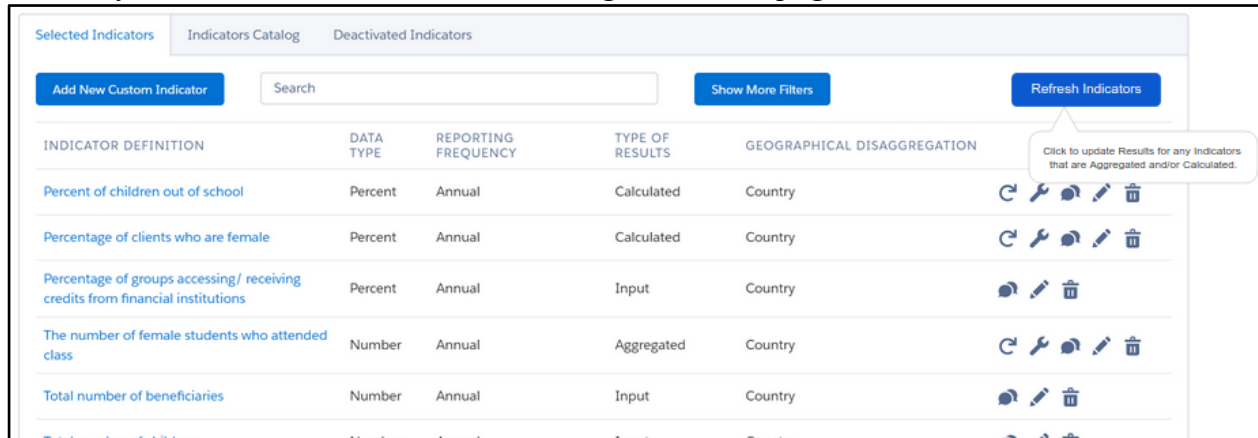
- **Run all Aggregated and Calculated Indicators with a single button**

Manage the display and update of results for your aggregated and calculated indicators using a

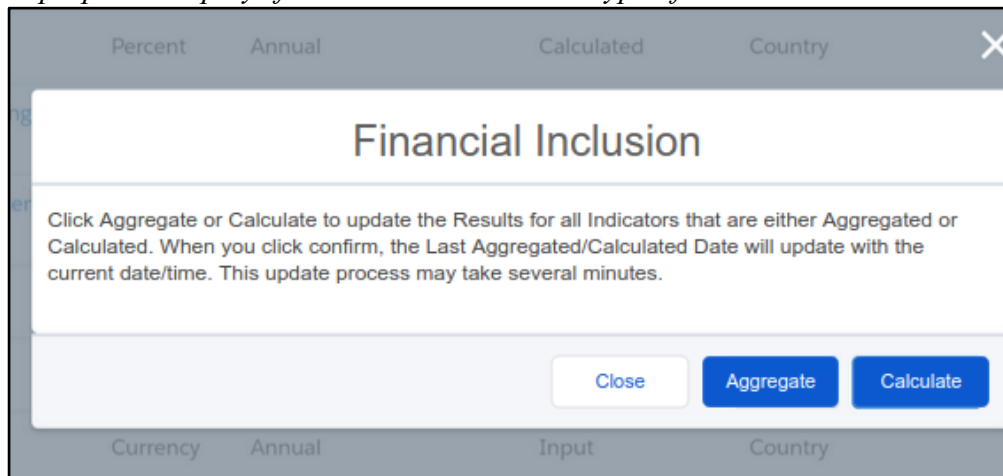


single button. Now, you can choose to run the results for indicators one at a time or run them all together. Once the results have been updated, you will receive an email notification.

New “Refresh Indicators” button on the Manage Indicators page



Pop-up that displays for users to select which type of indicator calculations to run



- **Project Indicators inherit Indicator-level disaggregation**

Previously, when an Indicator was selected from the Catalog, the subsequently created Project Indicator did not default to having the same Disaggregation Group assigned. The user would need to manually edit the Project Indicator to add the Disaggregation Group.

Now, when a new Project Indicator record is created, it inherits the Disaggregation Group and Values populated on the parent Indicator.

① Admin Note

The new Project Indicator record has a child Disaggregated Project Indicator. The Disaggregated Project Indicator record looks up to the same Disaggregation Group as the Disaggregated Indicator that is child to the parent Indicator.

Users can still change the inherited Disaggregation Group using the *Edit* icon.

- **Manage Indicators that are required for a Thematic focus**

While managing indicators if you are associating them with a Thematic Area, then use a new field (Required) to ensure that if the Thematic Area is added to a Project, any indicators which are required for the Thematic Area will be added to the Project.

- **Improvements to managing text limits Submissions Template Builder**

Previously, when creating a new Question or Section in a Template, if the user entered more than 255 characters, they would be able to save the Question/Section but would not be able to save the changes to the template itself. The template would save if the user modified the question/section text to be less than 255 characters.

Now:

- For Text, Text Area, Text Area (Long) field types: the user will not be allowed to enter values greater than the field character limit for any fields (custom-built by user or already in Amp data model), when they are creating/editing a Section/Question in the popup
- For Text Area (Rich) fields: the user *will be able* to enter values greater than the character limit; however, they will receive an error message which will be displayed until the entered data is modified.



Resolved Issues

- **Logframes: Cancel creating a new Framework Item**

If a user selects *Cancel* to close out of the "Create new framework item" popup, any percent or currency baseline/target to date/result to date values render as "0" on page until the user refreshes the page.

This is now resolved to ensure that a user can cancel out (by clicking "X" or *Cancel* button) and no changes are saved and page does not re-render differently.

- **Aggregated Indicators: Editing the Aggregation Criteria**

If a user edits the Aggregation Criteria for an aggregated Project Indicator and then clicks on the *Refresh* icon to run the batch (without refreshing the page), the action of running the batch causes the Aggregation Setting field, which stores the Aggregation Criteria, to overwrite the new value with the previous value, and the batch runs for the incorrect criteria.

This is now resolved so that:

- The Aggregation_Setting__c field retains new value
- The batch runs per the new Aggregation Criteria

- **Uploading Financials: Relate Records to Correct Project**

When using the Upload button to add/edit Financial records, users could populate lookups on the Financial record with records from other Project records. For example, if a user has an Activity called "Host workshops" in the "Financial Inclusion" Project, another user can successfully relate their Financial(s) in the "Tanzania Health Education Program" to the "Host workshops" Activity even if that Activity doesn't exist in the Tanzania project. This is primarily an issue for records that can have the same name across Projects.

This is now resolved using a filter on the Upload functionality so that Financial records can only be related to the other records on the same Project. This must be applied to the following lookup fields on Financial:

- Budget



- Reporting Period
- Activity



Packaging Changes

① **Admin Note:** Please note the highlighted fields and relationships in consideration of [Salesforce's relationships](#).

New Fields			
Object	Field	Field Type	Functional Impact
ampi__Indicator_Thematic_Area__c	ampi__Required__c	Checkbox	Thematic Areas Manage Indicators
ampi__Risk__c	ampi__Risk_Register__c	Lookup(Risk Register)	Risk Management
ampi__Risk__c	ampi__Activity__c	Lookup(Activity)	Risk Management
ampi__Risk__c	ampi__Category__c	Picklist(unrestricted)	Risk Management
ampi__Risk__c	ampi__Probability__c	Picklist(unrestricted)	Risk Management
ampi__Risk__c	ampi__Potential_Impact__c	Picklist(unrestricted)	Risk Management
ampi__Risk__c	ampi__Proximity__c	Picklist(unrestricted)	Risk Management
ampi__Risk__c	ampi__Priority__c	Picklist(unrestricted)	Risk Management
ampi__Risk__c	ampi__Status__c	Picklist(unrestricted)	Risk Management
ampi__Risk__c	ampi__Risk_Type__c	Picklist(unrestricted)	Risk Management
ampi__Risk__c	ampi__Control_Over_Risk__c	Picklist(unrestricted)	Risk Management
ampi__Risk__c	ampi__Notes__c	Long Text Area(32768)	Risk Management
ampi__Risk__c	ampi__Identification_Date__c	Date	Risk Management
ampi__Risk__c	ampi__Mitigation_Strategy__c	Picklist(unrestricted)	Risk Management



	Type__c		
ampi__Risk__c	ampi__Mitigation_Strategy_Description__c	Long Text Area(32768)	Risk Management
ampi__Risk_Assessment__c	ampi__Risk__c	Lookup(Risk)	Risk Assessment
ampi__Risk_Assessment__c	ampi__Reporting_Period__c	Lookup(Reporting Period)	Risk Assessment
ampi__Risk_Assessment__c	ampi__Contact__c	Lookup(Contact)	Risk Assessment
ampi__Risk_Assessment__c	ampi__Risk_Occurred__c	Picklist(unrestricted)	Risk Assessment
ampi__Risk_Assessment__c	ampi__Actual_Impact__c	Picklist(unrestricted)	Risk Assessment
ampi__Risk_Assessment__c	ampi__Description_of_Event__c	Long Text Area(32768)	Risk Assessment
ampi__Risk_Assessment__c	ampi__Continued_Risk__c	Picklist(unrestricted)	Risk Assessment
ampi__Risk_Assessment__c	ampi__Reason_No_Longer_A_Risk__c	Long Text Area(32768)	Risk Assessment

① **Admin Note:** The following fields are specific to clients who participate in the International Aid Transparency Initiative ([IATI](#)) only.

IATI Fields			
Object	Field	Field Type	Functional Impact
ampi__Project__c	ampi__IATI_Humanitarian__c	Checkbox	IATI Activity
ampi__Project__c	ampi__IATI_Linked_Data_URI__c	Text(255)	IATI Activity



ampi__Project__c	ampi__IATI_Budget_Not_Provided_Reason__c	Picklist	IATI Activity
ampi__Project__c	ampi__IATI_Objectives__c	Long Text Area(32768)	IATI Activity
ampi__Project__c	ampi__IATI_Target_Groups__c	Long Text Area(32768)	IATI Activity
ampi__Project__c	ampi__IATI_Other__c	Long Text Area(32768)	IATI Activity
ampi__Project__c	ampi__IATI_Activity_Scope__c	Picklist	IATI Activity
ampi__Project__c	ampi__IATI_Humanitarian_Scope_Vocabulary__c	Picklist	IATI Activity
ampi__Project__c	ampi__IATI_Humanitarian_Scope_Vocabulary_URI__c	Text(255)	IATI Activity
ampi__Project__c	ampi__IATI_Humanitarian_Scope_Code2__c	Text(100)	IATI Activity
ampi__Project__c	ampi__IATI_Humanitarian_Scope__c	Picklist	IATI Activity
ampi__Project__c	ampi__IATI_Humanitarian_Scope_Code__c	Text(100)	IATI Activity
ampi__Project__c	ampi__IATI_Humanitarian_Scope_Narrative__c	Text(255)	IATI Activity
ampi__Project__c	ampi__IATI_Aid_Type_Vocabulary__c	Picklist	IATI Activity
ampi__Project__c	ampi__IATI_Capital_Spend__c	Percent(0-100)	IATI Activity
ampi__Project__c	ampi__IATI_Hierarchy__c	Formula(Number)	IATI Activity
Account	ampi__IATI_Secondary_Reporter__c	Checkbox	IATI Activity
Account	ampi__IATI_Organization_XML_Link__c	URL	IATI Activity



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Account	ampi_IATI_Activity_XML_Link__c	URL	IATI Activity
ampi_Project_Geographic_Area__c	ampi_IATI_Percentage__c	Percent(0-100)	IATI Activity
ampi_Project_Geographic_Area__c	ampi_IATI_Region_Vocabulary__c	Picklist	IATI Activity
ampi_Project_Geographic_Area__c	ampi_IATI_Region_Vocabulary_URI__c	Text(255)	IATI Activity
ampi_Project_Geographic_Area__c	ampi_IATI_Location_Reach__c	Picklist	IATI Activity
ampi_Project_Geographic_Area__c	ampi_IATI_Code__c	Text(80)	IATI Activity
ampi_Project_Geographic_Area__c	ampi_IATI_Geographic_Vocabulary__c	Picklist	IATI Activity
ampi_Project_Geographic_Area__c	ampi_IATI_Location_Description__c	Long Text Area(32768)	IATI Activity
ampi_Project_Geographic_Area__c	ampi_IATI_Activity_Description__c	Long Text Area(32768)	IATI Activity
ampi_Project_Geographic_Area__c	ampi_IATI_Administrative_Area_Code__c	Text(80)	IATI Activity
ampi_Project_Geographic_Area__c	ampi_IATI_Administrative_Vocabulary__c	Picklist	IATI Activity
ampi_Project_Geographic_Area__c	ampi_IATI_Administrative_Level__c	Number(10,0)	IATI Activity
ampi_Project_Geographic_Area__c	ampi_IATI_Exactness__c	Picklist	IATI Activity
ampi_Project_Geographic_Area__c	ampi_IATI_Location_Class__c	Picklist	IATI Activity
ampi_Project_Geographic_Area__c	ampi_IATI_Feature_Designation__c	Picklist	IATI Activity



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ampi__Project_Geographic_Area__c	ampi__IATI_Feature_Designation_Category__c	Picklist	IATI Activity
ampi__Allocation__c	ampi__IATI_Organization_Role__c	Lookup(Organization Role)	IATI Activity
ampi__Allocation__c	ampi__IATI_Disbursement_Channel__c	Picklist	IATI Activity
ampi__Allocation__c	ampi__IATI_Humanitarian__c	Checkbox	IATI Activity
ampi__Allocation__c	ampi__IATI_Aid_Type__c	Picklist	IATI Activity
ampi__Allocation__c	ampi__IATI_Finance_Type__c	Picklist	IATI Activity
ampi__Allocation__c	ampi__IATI_Flow_Type__c	Picklist	IATI Activity
ampi__Allocation__c	ampi__IATI_Tied_Status__c	Picklist	IATI Activity
ampi__Allocation__c	ampi__IATI_Transaction_Date__c	Date	IATI Activity
ampi__Allocation__c	ampi__IATI_Description__c	Text(255)	IATI Activity
ampi__Allocation__c	ampi__IATI_Aid_Type_Vocabulary__c	Picklist	IATI Activity
ampi__Allocation__c	ampi__Internal_Code__c	Text(255)	IATI Activity
ampi__Allocation__c	ampi__IATI_Value_Date__c	Date	IATI Activity
ampi__Allocation__c	ampi__IATI_Value_Date__c	Date	IATI Activity
ampi__Allocation__c	ampi__IATI_Vocabulary__c	Picklist	IATI Activity
ampi__Allocation__c	ampi__IATI_Finance_Type_Category__c	Picklist	IATI Activity



ampi__Allocation__c	ampi__IATI_Aid_Type_Category__c	Picklist	IATI Activity
ampi__Budget__c	ampi__IATI_Budget_Status__c	Picklist	IATI Activity
ampi__Budget__c	ampi__IATI_Budget_Revision__c	Formula(Checkbox)	IATI Activity
ampi__Budget__c	ampi__Budget_Status__c	Picklist	IATI Organization
ampi__Budget__c	ampi__IATI_Type__c	Picklist	IATI Organization
ampi__Disbursements__c	ampi__IATI_Aid_Type_Vocabulary__c	Picklist	IATI Activity
ampi__Disbursements__c	ampi__IATI_Organization_Role__c	Lookup(Organization Role)	IATI Activity
ampi__Disbursements__c	ampi__IATI_Vocabulary__c	Picklist	IATI Activity
ampi__Disbursements__c	ampi__IATI_Finance_Type_Category__c	Picklist	IATI Activity
ampi__Disbursements__c	ampi__IATI_Disbursement_Channel__c	Picklist	IATI Activity
ampi__Disbursements__c	ampi__IATI_Humanitarian__c	Checkbox	IATI Activity
ampi__Disbursements__c	ampi__IATI_Aid_Type__c	Picklist	IATI Activity
ampi__Disbursements__c	ampi__IATI_Finance_Type__c	Picklist	IATI Activity
ampi__Disbursements__c	ampi__IATI_Flow_Type__c	Picklist	IATI Activity
ampi__Disbursements__c	ampi__IATI_Tied_Status__c	Picklist	IATI Activity
ampi__Disbursements__c	ampi__IATI_Transaction_Date__c	Date	IATI Activity



ampi__Disbursements__c	ampi__IATI_Description__c	Text(255)	IATI Activity
ampi__Disbursements__c	ampi__Internal_Code__c	Text(255)	IATI Activity
ampi__Disbursements__c	ampi__IATI_Value_Date__c	Date	IATI Activity
ampi__Disbursements__c	ampi__IATI_Planned_Disbursement_Type__c	Formula(Checkbox)	IATI Activity
ampi__Financial__c	ampi__Organization_Role__c	Lookup(Organization Role)	Financial Download/Upload IATI Organization IATI Activity
ampi__Financial__c	ampi__Internal_Code__c	Text(255)	Financial Download/Upload IATI Organization IATI Activity
ampi__Financial__c	ampi__IATI_Value_Date__c	Date	Financial Download/Upload IATI Activity
ampi__Financial__c	ampi__IATI_Aid_Type_Category__c	Picklist	Financial Download/Upload IATI Activity
ampi__Financial__c	ampi__IATI_Finance_Type_Category__c	Picklist	Financial Download/Upload IATI Activity
ampi__Financial__c	ampi__IATI_Aid_Type_Vocabulary__c	Picklist	Financial Download/Upload IATI Activity
ampi__Financial__c	ampi__IATI_Code__c	Text(100)	Financial Download/Upload IATI Activity
ampi__Financial__c	ampi__IATI_Organization_Role__c	Lookup(Organization Role)	Financial Download/Upload IATI Activity



ampi__Financial__c	ampi__IATI_Percentage__c	Percent(3,0)	Financial Download/Upload IATI Activity
ampi__Financial__c	IATI_Disbursement_Channel__c	Picklist(restricted)	Financial Download/Upload IATI Activity
ampi__Financial__c	ampi__IATI_Humanitarian__c	Checkbox	Financial Download/Upload IATI Activity
ampi__Financial__c	ampi__IATI_Aid_Type__c	Picklist(restricted)	Financial Download/Upload IATI Activity
ampi__Financial__c	ampi__IATI_Finance_Type__c	Picklist(restricted)	Financial Download/Upload IATI Activity
ampi__Financial__c	ampi__IATI_Flow_Type__c	Picklist(restricted)	Financial Download/Upload IATI Activity
ampi__Financial__c	ampi__IATI_Tied_Status__c	Picklist(restricted)	Financial Download/Upload IATI Activity
ampi__Financial__c	ampi__IATI_Transaction_Date__c	Date	Financial Download/Upload IATI Activity
ampi__Geographic_Area__c	ampi__IATI_Aid_Type_Vocabulary__c	Text(80)	IATI Reporting
ampi__IATI_Policy__c	ampi__Internal_Code__c	Text(255)	IATI Activity
ampi__IATI_Sector__c	ampi__Vocabulary_URI__c	Text(255)	IATI Activity
ampi__IATI_Policy__c	ampi__Policy_Marker_Narrative__c	Long Text Area(32768)	IATI Activity
ContentVersion	ampi__IATI_Publication_Date__c	Date	IATI Organization IATI Activity



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ContentVersion	ampi_Is_Included_In_IATI__c	Checkbox	IATI Organization IATI Activity
ContentVersion	ampi_IATI_Document_Category__c	Picklist(restricted)	IATI Organization IATI Activity
ContentVersion	ampi_Ready_For_IATI_Reporting__c	Checkbox	IATI Organization IATI Activity
ContentVersion	ampi_IATI_File_Format_Category__c	Picklist(restricted)	IATI Organization IATI Activity
ContentVersion	ampi_IATI_Document_Category_Level__c	Picklist(restricted)	IATI Organization IATI Activity
ampi_Objective__c	ampi_IATI_Result_Type__c	Formula	ManageFramework IATI Activity
ampi_Objective__c	ampi_IATI_Aggregation_Status__c	Checkbox	ManageFramework IATI Activity
ampi_Objective__c	ampi_IATI_Code__c	Text(100)	ManageFramework IATI Activity
ampi_Objective__c	ampi_IATI_Vocabulary__c	Picklist	ManageFramework IATI Activity
ampi_Objective__c	ampi_IATI_Vocabulary_URI__c	Text(255)	ManageFramework IATI Activity
ampi_Objective__c	ampi_Exclude_From_IATI__c	Checkbox(default unchecked)	ManageFramework IATI Activity
ampi_Project_Indicator__c	ampi_IATI_Description__c	Long Text Area(32768)	ManageIndicators IATI Activity
ampi_Project_Indicator__c	ampi_IATI_Vocabulary__c	Picklist	ManageIndicators IATI Activity
ampi_Project_Indicator__c	ampi_IATI_Vocabulary_URI__c	Text(255)	ManageIndicators IATI Activity
ampi_Organization_Role__c	ampi_IATI_Providing_Project__c	Lookup(Project)	IATI Activity
ampi_Organization_Role__c	ampi_Exclude_From_IATI__c	Checkbox(default unchecked)	IATI Activity



ampi__Transaction_Project_IATI_Sector__c	ampi__Project_IATI_Sector__c	Lookup(Project IATI Sector)	IATI Activity
ampi__Transaction_Project_IATI_Sector__c	ampi__Allocation__c	Lookup(Allocation)	IATI Activity
ampi__Transaction_Project_IATI_Sector__c	ampi__Budget__c	Lookup(Budget)	IATI Activity
ampi__Transaction_Project_IATI_Sector__c	ampi__Disbursement__c	Lookup(Disbursement)	IATI Activity
ampi__Project_Role__c	ampi__Is_IATI_Reporter__c	Checkbox(default unchecked)	IATI Activity
ampi__Project_Role__c	ampi__IATI_Contact_Type__c	Picklist	IATI Activity



Other Configuration Changes

① For any page layouts and field sets, a preceding asterisk indicates that the field has been marked as required.

Changes to Indicator__c object

Field Sets

1. New Field Set: `ampi__INDICATOR_CATALOG_SEARCH_FILTER`

a. In the Field Set

- i. `ampi__Data_Type__c`
- ii. `ampi__Geographical_Disaggregation__c`
- iii. `ampi__Reporting_Frequency__c`
- iv. `ampi__Thematic_Area_Text__c`

b. Available for Field Set

- i. `ampi__Red_Yellow_Threshold__c`
- ii. `ampi__Yellow_Green_Threshold__c`
- iii. `ampi__Active__c`
- iv. `ampi__Aim__c`
- v. `ampi__Calculate_Total__c`
- vi. `ampi__Cross_Disaggregation_by_Sex__c`
- vii. `ampi__Cumulative__c`
- viii. `ampi__Data_Source__c`
- ix. `ampi__Disaggregation_Group__c`
- x. `ampi__Exclude_From_IATI__c`
- xi. `ampi__Guideline__c`
- xii. `ampi__IATI_Aggregation_Status__c`
- xiii. `ampi__External_Code__c`
- xiv. `ampi__Indicator_Code__c`
- xv. `ampi__Indicator_Level__c`
- xvi. `ampi__Indicator_Library__c`
- xvii. `ampi__Notes__c`
- xviii. `ampi__Objective__c`
- xix. `ampi__Parent_Indicator__c`
- xx. `ampi__Reporting_Currency__c`
- xxi. `ampi__Project__c`
- xxii. `ampi__Target_Frequency__c`
- xxiii. `ampi__Type__c`



- xxiv. `ampi__Type_of_Results__c`
- xxv. `ampi__Units__c`
- xxvi. `ampi__Validation_Range_Maximum__c`
- xxvii. `ampi__Validation_Range_Minimum__c`
- xxviii. `ampi__Targets_Are_Disaggregated__c`

Changes to Project_Indicator__c object

Field sets

1. New Field Set: `ampi__PROJECT_INDICATORS_SEARCH_FILTERS`

a. In the Field Set

- i. `ampi__Data_Type__c`
- ii. `ampi__Geographical_Disaggregation__c`
- iii. `ampi__Reporting_Frequency__c`
- iv. `ampi__Thematic_Area_Text__c`

b. Available for Field Set

- i. `ampi__Red_Yellow_Threshold__c`
- ii. `ampi__Yellow_Green_Threshold__c`
- iii. `ampi__Aim__c`
- iv. `ampi__Baseline__c`
- v. `ampi__Cross_Disaggregation_by_Sex__c`
- vi. `ampi__Cumulative__c`
- vii. `ampi__Data_Source__c`
- viii. `ampi__Disaggregation_Group__c`
- ix. `ampi__Exclude_From_IATI__c`
- x. `ampi__Geographic_Area_Text__c`
- xi. `ampi__Guideline__c`
- xii. `ampi__Indicator_Level__c`
- xiii. `ampi__Target_LOP__c`
- xiv. `ampi__Notes__c`
- xv. `ampi__Number_of_Decimal_Places_Allowed__c`
- xvi. `ampi__Objective__c`
- xvii. `ampi__Related_Indicator__c`
- xxviii. `ampi__Reporting_Currency__c`
- xix. `ampi__Reporting_Period_Text__c`
- xx. `ampi__Result_to_Date__c`
- xxi. `ampi__Target_Frequency__c`
- xxii. `ampi__Target_to_Date__c`
- xxiii. `ampi__Type__c`



- xxiv. ampi__Units__c
 - xxv. ampi__Validation_Range_Maximum__c
 - xxvi. ampi__Validation_Range_Minimum__c
 - xxvii. ampi__Calculation_Formula__c
 - xxviii. ampi__Last_Aggregation_Date__c
 - xxix. ampi__Last_Calculation_Date__c
 - xxx. ampi__Type_of_Results__c
 - xxxi. ampi__Calculate_Total__c
 - xxxii. ampi__Targets_Are_Disaggregated__c
 - xxxiii. ampi__Target_Frequency_Formula__c
2. New Field Set: ampi__AR_SEARCH_FILTERS
- a. In the Field Set
 - i. ampi__Data_Type__c
 - ii. ampi__Geographical_Disaggregation__c
 - iii. ampi__Reporting_Frequency__c
 - iv. ampi__Thematic_Area_Text__c
 - b. Available for Field Set
 - i. ampi__Red_Yellow_Threshold__c
 - ii. ampi__Yellow_Green_Threshold__c
 - iii. ampi__Aim__c
 - iv. ampi__Baseline__c
 - v. ampi__Cross_Disaggregation_by_Sex__c
 - vi. ampi__Cumulative__c
 - vii. ampi__Data_Source__c
 - viii. ampi__Disaggregation_Group__c
 - ix. ampi__Exclude_From_IATI__c
 - x. ampi__Geographic_Area_Text__c
 - xi. ampi__Guideline__c
 - xii. ampi__Indicator_Level__c
 - xiii. ampi__Target_LOP__c
 - xiv. ampi__Notes__c
 - xv. ampi__Number_of_Decimal_Places_Allowed__c
 - xvi. ampi__Objective__c
 - xvii. ampi__Related_Indicator__c
 - xviii. ampi__Reporting_Currency__c
 - xix. ampi__Reporting_Period_Text__c
 - xx. ampi__Result_to_Date__c
 - xxi. ampi__Target_Frequency__c



- xxii. `ampi__Target_to_Date__c`
 - xxiii. `ampi__Type__c`
 - xxiv. `ampi__Units__c`
 - xxv. `ampi__Validation_Range_Maximum__c`
 - xxvi. `ampi__Validation_Range_Minimum__c`
 - xxvii. `ampi__Calculation_Formula__c`
 - xxviii. `ampi__Last_Aggregation_Date__c`
 - xxix. `ampi__Last_Calculation_Date__c`
 - xxx. `ampi__Type_of_Results__c`
 - xxxi. `ampi__Calculate_Total__c`
 - xxxii. `ampi__Targets_Are_Disaggregated__c`
 - xxxiii. `ampi__Target_Frequency_Formula__c`
3. New Field Set: `ampi__ST_SEARCH_FILTERS`
- a. In the Field Set
 - i. `ampi__Data_Type__c`
 - ii. `ampi__Geographical_Disaggregation__c`
 - iii. `ampi__Reporting_Frequency__c`
 - iv. `ampi__Thematic_Area_Text__c`
 - b. Available for Field Set
 - i. `ampi__Red_Yellow_Threshold__c`
 - ii. `ampi__Yellow_Green_Threshold__c`
 - iii. `ampi__Aim__c`
 - iv. `ampi__Baseline__c`
 - v. `ampi__Cross_Disaggregation_by_Sex__c`
 - vi. `ampi__Cumulative__c`
 - vii. `ampi__Data_Source__c`
 - viii. `ampi__Disaggregation_Group__c`
 - ix. `ampi__Exclude_From_IATI__c`
 - x. `ampi__Geographic_Area_Text__c`
 - xi. `ampi__Guideline__c`
 - xii. `ampi__Indicator_Level__c`
 - xiii. `ampi__Target_LOP__c`
 - xiv. `ampi__Notes__c`
 - xv. `ampi__Number_of_Decimal_Places_Allowed__c`
 - xvi. `ampi__Objective__c`
 - xvii. `ampi__Related_Indicator__c`
 - xviii. `ampi__Reporting_Currency__c`
 - xix. `ampi__Reporting_Period_Text__c`



- xx. `ampi__Result_to_Date__c`
- xxi. `ampi__Target_Frequency__c`
- xxii. `ampi__Target_to_Date__c`
- xxiii. `ampi__Type__c`
- xxiv. `ampi__Units__c`
- xxv. `ampi__Validation_Range_Maximum__c`
- xxvi. `ampi__Validation_Range_Minimum__c`
- xxvii. `ampi__Calculation_Formula__c`
- xxviii. `ampi__Last_Aggregation_Date__c`
- xxix. `ampi__Last_Calculation_Date__c`
- xxx. `ampi__Type_of_Results__c`
- xxxi. `ampi__Calculate_Total__c`
- xxxii. `ampi__Targets_Are_Disaggregated__c`
- xxxiii. `ampi__Target_Frequency_Formula__c`

Changes to Project__c object

Lightning Record Page

1. Add Tab "Risk" between Activities and Indicators
 - a. On the Project Risk Tab, add Report Chart lightning component for Report "Risks by Type and Status" filtered to current project
 - b. On the Project Risk Tab, add Report Chart lightning component for Risks Occurred with Actual Impact filtered to current project
 - c. On the Project Risk Tab, add Related List - Single lightning component for Risk Registers. Ensure it is an Enhanced List displaying up to 3 records.

Changes to Financial__c object

Field sets

2. New field set: `ampi__REPORT_EXCEL_COLUMNS`
 - a. In the Field Set
 - i. `ampi__Type__c`
 - ii. `ampi__Category__c`
 - iii. `ampi__Subcategory__c`
 - iv. `ampi__Name`
 - v. `ampi__Amount_Planned__c`
 - vi. `ampi__Amount_Actual__c`
 - vii. `ampi__Cost_Per_Unit__c`
 - viii. `ampi__Unit__c`



- ix. ampi__Quantity__c
- x. ampi__Description__c
- xi. ampi__Activity__c
- xii. ampi__Budget__c

Validation Rule

1. New Validation Rule, Is_Budget_Locked
 - a. Error Message: "Budget is locked"
 - b. Function: Throws an error when user tries to create a new financial line item and parent budget is locked. The error message is displayed on Excel Upload Error Log.
2. New Validation Rule, Organization_Role_Not_In_Current_Project
 - a. Error Message: Incorrect Organization Role is Selected
 - b. Function: Ensure that related object "Organization Role" looks up to the same organization that ampi__Budget__r.ampi__Project__c looks up to

Changes to Allocation__c object

Validation Rule

1. New Validation Rule, Organization_Role_Not_In_Current_Project
 - a. Error Message: Incorrect Organization Role is Selected
 - b. Function: Ensure that related object "Organization Role" looks up to the same receiving project that Allocation looks up to

Changes to Disbursement__c object

Validation Rule

1. New Validation Rule, Organization_Role_Not_In_Current_Project
 - a. Error Message: Incorrect Organization Role is Selected
 - b. Function: Ensure that related object "Organization Role" looks up to the same organization that related object Project looks up to

Changes to Reporting_Period__c object

Quick Actions

1. New Quick Action Download_Financials
2. New Quick Action Upload_Financials
3. New Quick Action Submit

Page Layout



1. Added quick action to Download, Upload, and Submit reporting period on Reporting Period Layout

Lightning Record Page

1. Added a related list for Financial__c on Reporting_Period_Record_Page

New Custom Object Tabs

1. Risk
2. Risk Assessment
3. Risk Register

New Report Type

1. Risks with Risk Assessments

New Risk__c object

1. New Lightning Record Page and Page Layout
2. Validation Rules
 - a. New Validation Rule, Selected_Activity_Outside_Project
 - i. Error Message: Selected Activity is outside Project Activities
 - ii. Function: Check data integrity by making sure only those Activities whose parent Implementation Plan look up to same Project that parent Risk Register looks up to can be selected.

New Risk_Assessment__c object

1. New Lightning Record Page and Page Layout
2. Validation Rules
 - a. New Validation Rule, Selected_Rep_Period_Outside_Project
 - i. Error Message: Selected Reporting Period is outside of Project Reporting Period
 - ii. Function: Check data integrity by making sure only those Reporting Periods which look up to same project that Parent Risk's Parent Risk Register looks up to can be selected.

New Transaction_Project_IATI_Sector__c object

1. Validation Rules



- a. New Validation Rule, Incorrect_Allocation_Selected
 - i. Error Message: Incorrect Allocation Selected
 - ii. Function: Ensure that related object "Allocation" looks up to the same project that related object "Project IATI Sector" looks up to
- b. New Validation Rule, Incorrect_Budget_Selected
 - i. Error Message: Incorrect Budget Selected
 - ii. Function: Ensure that related object "Budget" looks up to the same project that related object "Project IATI Sector" looks up to
- c. New Validation Rule, Incorrect_Disbursement_Selected
 - i. Error Message: Incorrect Disbursement Selected
 - ii. Function: Ensure that related object "Disbursement" looks up to the same project that related object "Project IATI Sector" looks up to

Global Value Sets

1. New global value sets:
 - a. IATI_Disbursement_Channel
 - b. IATI_Aid_Type
 - c. IATI_Finance_Type
 - d. IATI_Flow_Type
 - e. IATI_Tied_Status

Custom Labels (See the full list of custom labels [here](#))

1. New custom labels
 - a. RUN_PROJ_AGG_CALC_BATCH_BTN
 - i. Value: "Refresh Indicators"
 - ii. Function: Label for Refresh Indicators button to run batch Aggregation and Calculation for Indicators on Add Results page
 - b. RUN_PROJ_AGG_CALC_BATCH_TOOLTIP
 - i. Value: "Click to update for all Indicators that are aggregated or calculated."
 - ii. Function: Tooltip for Refresh Indicators button to run batch Aggregation and Calculation for Indicators on Add Results page
 - c. REPORTING_PERIOD_LOCKED
 - i. Value: "This reporting period is locked and cannot be modified. Please contact your Project Manager for more information."
 - ii. Function: Text that appears when attempting to modify a locked budget on Grantee Reporting



- d. CONFIRM_PROJ_AGG_CALC_BATCH_BODY
 - i. Value: “Click confirm to update the Results for all Indicators that are either Aggregated or Calculated. When you click Confirm, the Last Aggregated/Calculated Date will update with the current date/time. This update process may take several minutes.”
 - ii. Function: Text for Confirm Batch popup on Add Results page
- e. CONFIRM_PROJ_AGGREGATE
 - i. Value: “Aggregate”
 - ii. Function: Label for Aggregate button on Confirm Batch popup
- f. CONFIRM_PROJ_CALCULATE
 - i. Value: “Calculate”
 - ii. Function: Label for Calculate button on Confirm Batch popup
- g. REFRESH_INPROGRESS_AGG_CALC_BATCH_TOOLTIP
 - i. Value: “Refresh In Progress”
 - ii. Function: Tooltip for Refresh Indicators button when Aggregation/Calculation batch is running
- h. PREPARE_RP_FINANCIAL_UPLOAD_3
 - i. Value: “3. New rows will create new financial line items on the Reporting Period and the selected Budget. If you want to update a line item, be sure to edit it directly on the second tab.”
 - ii. Function: Text for Instructions on Instruction Tab of Financial Upload excel
- i. PREPARE_RP_FINANCIAL_UPLOAD_5
 - i. Value: “5. Ensure that there is only one tab from which data is uploaded. You can add new tabs to your Excel, but ONLY the downloaded tab (named according to the Reporting Period that you have open in Amp) will be successfully uploaded.”
 - ii. Function: Text for Instructions on Instruction Tab of Financial Upload excel
- j. PREPARE_RP_FINANCIAL_UPLOAD_7
 - i. Value: “7. For relationship fields like Budget or Activity, you must enter the name of the related record so that it is an exact match to upload correctly (e.g. If your Budget is "Program Budget Q1 2019" and you enter "Prog. Budget Q1 2019" for a financial line item, the upload will fail for that line item.)”
 - ii. Function: Text for Instructions on Instruction Tab of Financial Upload excel
- k. PREPARE_RP_FINANCIAL_UPLOAD_4A



- i. Value: “a. Tab name (Reporting Period name)”
 - ii. Function: Text for Instructions on Instruction Tab of Financial Upload excel
- l. PREPARE_RP_FINANCIAL_UPLOAD_4B
 - i. Value: “b. Header text (Reporting Period name)”
 - ii. Function: Text for Instructions on Instruction Tab of Financial Upload excel
- m. REPORT_LOCKED
 - i. Value: “This Reporting Period is locked and cannot be modified. Please contact your Project Manager for more information.”
 - ii. Function: Text for error message on error popup on Reporting Period Screen
- n. REPORT_LOCKED_HEADER
 - i. Value: “Reporting Period Locked”
 - ii. Function: Text for header on error popup on Reporting Period Screen
- o. UNDERSTAND_RP_FINANCIAL_DOWNLOAD_1
 - i. Value: “1. The second tab in this sheet contains the data for a Reporting Period.”
 - ii. Function: Text for Instructions on Instruction Tab of Reporting Period excel
- p. UNDERSTAND_RP_FINANCIAL_DOWNLOAD_2
 - i. Value: “2. All columns contain information about the Financials for that Reporting Period.”
 - ii. Function: Text for Instructions on Instruction Tab of Reporting Period excel
- q. UPLOAD_RP_FINANCIAL_1
 - i. Value: “1. Once your Excel is updated, saved, and ready for upload, open the relevant Reporting Period as defined on the tab you wish to upload.”
 - ii. Function: Text for Instructions on Instruction Tab of Reporting Period excel
- r. SUBMIT_GRANT_REPORT_ERR_MESSAGE
 - i. Value: “Unable to submit grant report. Please contact your System Administrator.”
 - ii. Function: Text for Error Message on Reporting Period page
- s. CONFIRM_SUBMIT_GRANT_REPORT
 - i. Value: “Confirm if you would like to submit your grant report. Once your report is submitted, it can no longer be modified.”
 - ii. Function: Text for Confirmation Popup on Reporting Period page



- t. REFRESH_BUTTON_TITLE
 - i. Value: “Refresh Page”
 - ii. Function: Label for Refresh Icon to refresh Manage Logframe, Activites, Manage Indicators, Set targets, Add Results and Performance Graphs pages on Project
- u. UPDATE_WARNING_MESSAGE
 - i. Value: “This Page has been updated. Please refresh the page for the latest information, using the icon at the top right.”
 - ii. Function: Text for Refresh Banner on Manage Logframe, Activites, Manage Indicators, Set targets, Add Results and Performance Graphs pages on Project
- v. DYNAMIC_SEARCH_FILTER_FROM
 - i. Value: “From”
 - ii. Function: Text to display on Search Filters and Date Filters on Project
- w. DYNAMIC_SEARCH_FILTER_TO
 - i. Value: “To”
 - ii. Function: Text to display on Search Filters and Date Filters on Project
- x. INVALID_INPUT
 - i. Value: “More than one decimal delimiters”
 - ii. Function: Error handling for invalid input on Search Filters and Date Filters on Project

Custom Settings

- 1. New Custom Settings
 - a. `ampi__ManageIndicators__c`
 - i. Fields
 - 1. `ampi__Hide_Add_New_Custom_Indicator_Button__c`
 - a. Function: If TRUE, “Add New Custom Indicator” Button is hidden. If FALSE “Add New Custom Indicator” Button is displayed on Selected Indicators tab of Manage Indicators page
 - 2. `ampi__Hide_Edit_Icon__c`
 - a. Function: If TRUE, “Edit” Icon is hidden. If FALSE, “Edit” Icon is displayed on Selected Indicators tab of Manage Indicators page
 - 3. `ampi__Hide_Delete_Icon__c`
 - a. Function: If TRUE, “Delete” Icon is hidden. If FALSE,



- hidden. If FALSE, “Add New Disbursement” Button is displayed on Manage Disbursement page
 - 2. `ampi__Hide_Edit_Icon__c`
 - a. Function: If TRUE, “Edit” Icon is hidden. If FALSE, “Edit” Icon is displayed on Manage Disbursement page
 - 3. `ampi__Hide_Delete_Icon__c`
 - a. Function: If TRUE, “Delete” Icon is hidden. If FALSE, “Delete” Icon is displayed on Manage Disbursement page
 - 4. `ampi__Hide_New_Budget_Button__c`
 - a. Function: If TRUE, “New” Button is hidden. If FALSE, “New” Button is displayed on Related List “Budget” on Manage Disbursement page
 - d. `ampi__ManageLogframes__c`
 - i. Fields
 - 1. `ampi__Hide_Add_New_Framework_Item_Button__c`
 - a. Function: If TRUE, “Add New Framework Item” Button is hidden. If FALSE, “Add New Framework Item” Button is displayed on Manage Framework page
 - 2. `ampi__Hide_Edit_Icon__c`
 - a. Function: If TRUE, “Edit” Icon is hidden. If FALSE, “Edit” Icon is displayed on Manage Framework page
 - 3. `ampi__Hide_Delete_Icon__c`
 - a. Function: If TRUE, “Delete” Icon is hidden. If FALSE, “Delete” Icon is displayed on Manage Framework page
- 2. Updated Custom Settings
 - a. `ampi__SetTargets__c`
 - i. New Fields
 - 1. `ampi__Hide_Comments_Icon__c`
 - a. Function: If TRUE, “Comments” Icon is hidden. If FALSE, “Comments” Icon is displayed on Set Targets page
 - 2. `ampi__Hide_Download_Excel_Button__c`
 - a. Function: If TRUE, “Download Excel” Button is hidden. If FALSE, “Download Excel” Button is displayed on Set Targets page
 - 3. `ampi__View_Only_Mode__c`
 - a. Function: If TRUE, the Set Targets page is locked from editing
 - b. `ampi__AddResults__c`



- i. New Fields
 - 1. `ampi__Hide_Comments_Icon__c`
 - a. Function: If TRUE, “Comments” Icon is hidden. If FALSE, “Comments” Icon is displayed on Add Results page
 - 2. `ampi__Hide_Download_Excel_Button__c`
 - a. Function: If TRUE, “Download Excel” Button is hidden. If FALSE, “Download Excel” Button is displayed on Add Results page
 - 3. `ampi__View_Only_Mode__c`
 - a. Function: If TRUE, the Add Results page is locked from editing