Installation Guide

Version Name: Delphinus | Release Date: Fall 2020

Installation 5

Configuration 6

System Administration and Setup 6

Set up My Domain (Required) 6

Enable Streaming API for the Org (Required) 6

Enable Chatter (Required) 7

Enable Content Deliveries and Public Links (Required) 7

Enable Path 8

Browser-Specific Setup 8

Override Content Security Policy for Internet Explorer 8

Basic User Administration and Permission Sets 9

Access for Users who need full access to Amp Impact Objects 10

Access for Users who need limited access to Amp Impact Objects 10

Enable/Disable Features using Amp Impact Setup Custom Setting 12

Document Upload Enabled? 15

Validation Ranges Enabled? 15

Stop Light Enabled? 15

Allow Targets Column Download? 16

Platform Encryption Considerations 16

Aggregations 16

Pages and Components 17

Dynamic Search Filter 17

Display/Hide Buttons on ManageFramework 17

Display/Hide Buttons and Tabs on ManageIndicators 18

Display/Hide Buttons on ActivityTracking 21

Display/Hide Buttons or enable View Only Mode on SetTargets 21

Display/Hide Buttons and Target Columns or enable View Only Mode on Add Results 23

Enable Submit button on Add Results page of Reporting Period 25

Display/Hide Buttons ManageDisbursements 25

Salesforce Classic: Set-up Navigation Bar and determine Access 27

Salesforce Classic: Customize the Project record page 30

Customize Field Sets 30
Manage Framework Visualforce page 32
Activity Chart Lightning Component 36
Manage Indicators Visualforce page / Lightning Web Component 39
Set Targets Visualforce page 46
Add Results Visualforce page 47
Financial Excel Download & Upload 48
Manage Disbursements Visualforce page 50
Submission Lightning Components 52
Customize Lookup Display Field 55
Display Lightning Pages 57
Risk Management Tab on Project Lightning Record Page 58
Filter the Risk Report Chart for the Current Project record 59
Customizing Terminology and Labels 60
Translate Tabs 60
Translate Field Labels 61
Customize/Translate Picklist Values 62
Translate Custom Labels in VisualForce Pages and Lightning Components 65
Set Up Project Page 67
Customize the Project record page in Lightning 67
Add manageIndicators Lightning Web Component to the Project Lightning Page 68
Set Up Manage Indicators Page 70
Set up Calculated and Aggregated Indicators 70
Enable Streaming API in the Salesforce Org (Required) 70
Relevant Fields Available in the Field Sets 70
Schedule the Aggregation and Calculation Batches 71
Customize Dynamic Relationships and Validation Rules for Indicators 71
Define Indicators on Standard and Custom Objects - Optional 72
Define Validation Rules for Project Indicators - Optional 75
Set Up Submissions 75
Field Sets: Customize Pop-ups to Create/Edit Sections and Questions in Submissions 76
Assign Record Types on Profiles (Required) 76
Assign Permission Sets to Users 77
Customize Submission Objects, Lightning Pages, and Components 78

Create a custom relationship between Submission and another object (Required) 80
Create a Submission Relationship custom setting record 81
Assign the Submission page layouts to specific profiles & record types 82
Assign the Question page layouts to specific profiles & record types 83
Assign the Lightning pages to specific profiles 83
Set up Radar Charts to display Submission scores 84
Add the Radar Chart component to Lightning and Community pages 84
Set up automation for users to view Submissions components outside of the Submission record page 85
Set up automation to assign scores to Sections and Submissions 85
Set up automation to lock Responses and/or Reviews 86

Record Limits per Feature 87

Customize Automation 89
Customize Process Automation 89
Process Builder 89

Deactivate Automation 90
Deactivate Triggers using Dynamic Loader 90
Deactivate Process Automation 90
Process Builder 90
Workflow Rules 91

Uninstallation Steps 92
Delete PushTopic 92
Unassign Lightning Record Pages 94
Unassign Permission Sets 94
Deactivate Processes 95
Deactivate Flows 95
Custom Steps per Use Case 96
Custom Lightning Pages 96
Remove Amp Component References from Custom Lightning Page 96
Delete Custom Lightning Page 96
Community 97
Navigation Menu 97
Lightning Components 98
Object Pages 99
Permission Sets 101

Automation 101
Custom Processes 101
Custom Flow 102
Uninstall the Amp Impact Package 102

Installation

The following installation and configuration instructions are updated as of August 2020 - covering all releases of Amp Impact.

Latest Release Version Name: Delphinus (Fall 2020) | Version Number: 1.25.2

1. Install Amp Impact into a developer environment or sandbox using the installation link provided below.
   - Select which users you wish to install the package for (learn more here).
     - You may choose to install for Admins only, for all users, or for specific profiles. We generally recommend installing for Admins only so that access may be opened up by custom permissions, but this is entirely dependent on your organization's use case.
   - Click "Install".
2. Configure user, security, and app settings as required for your specific use-case (see the "Configuration" section).
3. Consult the "Set Up Projects" section on how to get started with using Amp Impact.
4. Perform your current use cases in the sandbox and ensure that they are operating as expected.
5. When you are ready to deploy to production, use the installation link below.
6. Update your custom settings in Production as these will not "carry over" from your sandbox.

Installation Links:
Sandbox: https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4o000001zqbD
Production: https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4o000001zqbD

> ⓘ **Admin Note:**
> If My Domain has already been set up, replace "test" or "login" in the installation links with the specific domain appended by `.my.` for the org.
>
> See below for an example of a customized installation link:
> `https://customdomain.my.salesforce.com/packaging/installPackage.apexp?p0=04t4o000001zqbD`

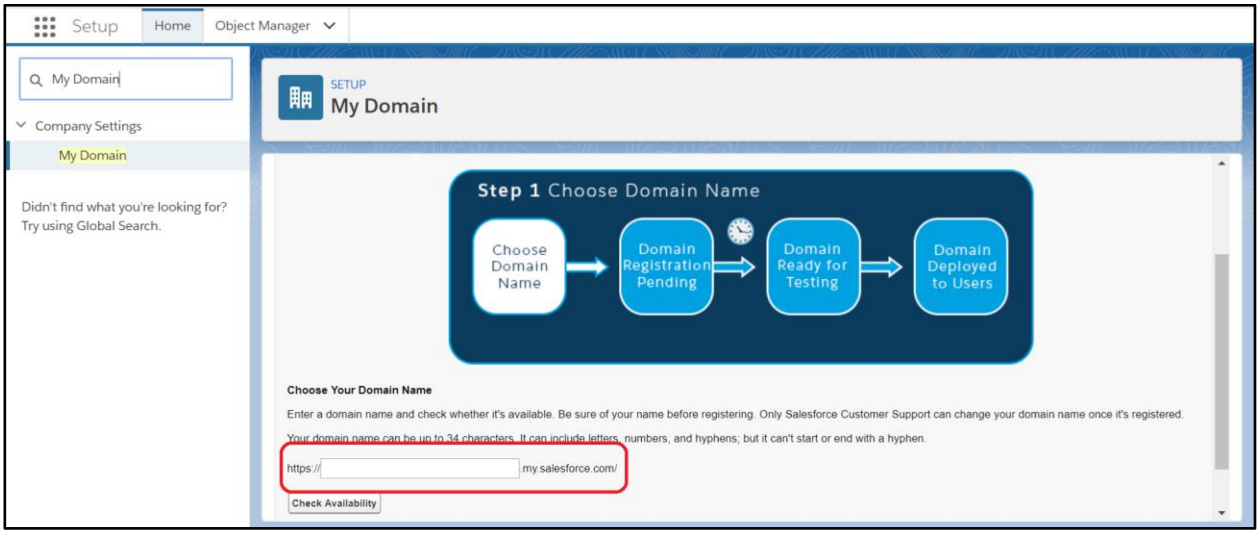
Configuration

1. System Administration and Setup

ⓘ **Admin Note:**
Setting up My Domain, enabling Streaming API, enabling Chatter, and enabling Content Deliveries and Public Links should be done prior to installing Amp Impact into a sandbox or production environment.

Set up My Domain (Required)

In order to use any of the custom Lightning Components in Amp, My Domain will need to be enabled and set up in the org. System Admins can set up My Domain and create a custom Salesforce domain for the organization through the Setup menu.

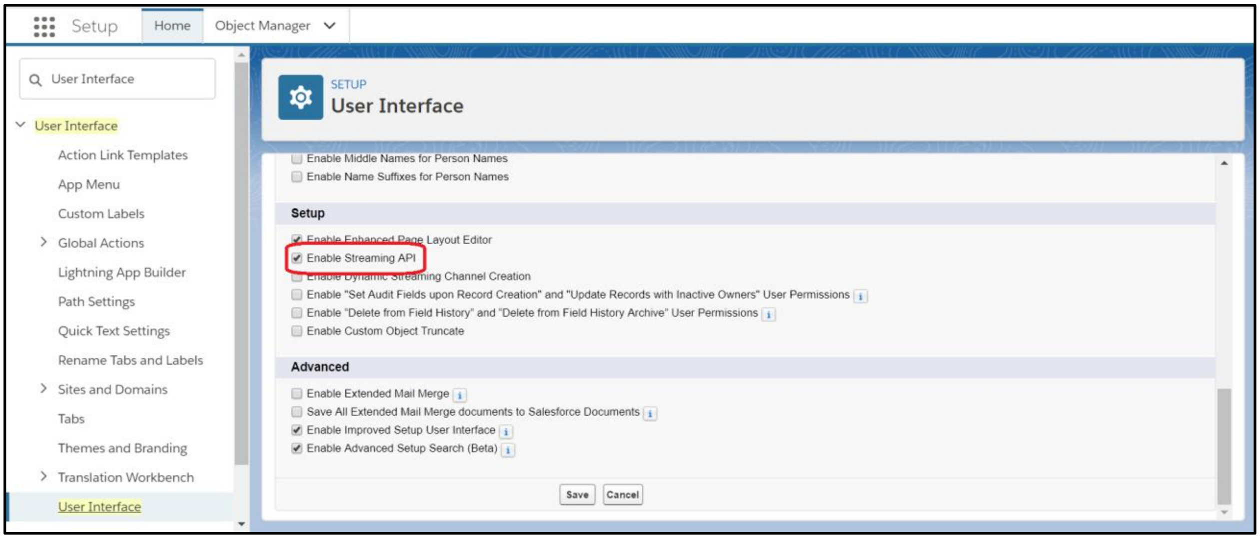


Enable Streaming API for the Org (Required)

Streaming API must be enabled in your Salesforce org to use *Aggregated and Calculated Indicators* functionality. System Admins can enable Streaming API following these steps:

1. Open *Setup*.
2. Use the Quick Find search to find and open User Interface.
3. Scroll to the Setup section of User Interface.
4. Make sure that “Enable Streaming API” is selected.

5. Click *Save*.



Enable Chatter (Required)

1. Open *Setup*.
2. Use the Quick Find search to find and open Chatter Settings.
3. Click on the Edit button
4. Make sure “Enable” is selected under section Chatter Settings
5. Click on the Save button

Enable Content Deliveries and Public Links (Required)

Content deliveries and public links convert files into an online format that's available through links. This enables users to send links to people inside or outside your organization. System Admins can enable Content Deliveries and Public Links by following these steps:

1. Open *Setup*.
2. Use the Quick Find search to find Content Deliveries and Public Links.
3. Enable Content Deliveries and Public Links by marking the first two checkboxes as *TRUE*.

ⓘ **Admin Note:**
If Content Deliveries and Public Links is not available from setup, contact Salesforce Support to enable the setting.

Enable Path

For Lightning pages in Amp to correctly display the Path component, Path must be enabled in the Salesforce org. System Admins can enable Path by following these steps:

1. Open *Setup*.
2. Use the Quick Find search to find and open Path Settings.
3. Click the *Enable* button.
4. Edit the Amp Paths as needed:
    a. *Project Status* - This Path is used on the Project Lightning record page, and its display depends on the value in the ampi__Project_Status__c field on ampi__Project__c.
    b. *Submission Status* - This Path is used on the Submission Response and Submission Review Lightning record pages, and its display depends on the value in the ampi__Status__c field on ampi__Submission__c. By default, it is assigned to the Submission Record Type.

Browser-Specific Setup

Override Content Security Policy for Internet Explorer

ⓘ **Admin Note:**

This step is optional, as it is only relevant for those using IATI XML generation or aggregated and calculated indicators on Internet Explorer browser.

As per Salesforce's restriction of using email templates on only CSP compliant browsers, users on Internet Explorer browser will face difficulties accessing Salesforce from email . You can advise users to use a different (CSP-compliant) browser or override the restrictions as mentioned in the link.

Basic User Administration and Permission Sets

System Settings for all Users who will be using Amp Impact

System Settings in Permission Sets are not enabled by default.

1. Go to the Setup Quick Search box, and enter "Permission Sets".
2. Click "New" to create a new Permission Set.
3. Set the label as "Amp Impact System Permissions", and the API name should automatically render as Amp_Impact_System_Permissions.
4. (Recommended) Leave Section Activation Required? checkbox and License picklist blank.
5. Click *Save* to create the Permission Set.
6. After savings, scroll down and click "System Permissions".
7. Select the following System Permissions as TRUE:

ⓘ **Admin Note:**
The following list can be customized based on what the User(s) needs to access in regards to Reports & Dashboards and running Apex batches for Aggregated or Calculated Indicators.

- API Enabled
- Create and Customize Dashboards
- Create and Customize Reports
- Create Dashboard Folders
- Create Report Folders
- Drag-and-Drop Dashboard Builder
- Edit My Dashboards
- Edit My Reports

- Export Reports
- Manage Dynamic Dashboards
- Report Builder
- Run Reports
- View My Team's Dashboards

Access for Users who need full access to Amp Impact Objects

After installing Amp Impact, follow these steps to ensure your Users with Admin rights for Amp Impact have access to the Amp Impact Admin permission set.

1. Go to the Setup Quick Search box, and enter "Permission Sets".
2. Select the "Amp Impact Admin" Permission Set.
3. Click the Manage Assignments button.
4. Click the Add Assignments button.
5. Select all relevant users that should have access to the Amp Impact Admin Permission Set and click "Assign".

> ⓘ **Admin Note:**
> For users who will be creating Project Geographic Area records, System Admins must grant the Edit access to the ampi__Exclude_from_IATI__c field from Setup.

Access for Users who need limited access to Amp Impact Objects

For other Amp Impact app users who are using the tool for data entry, for example, create a new permission set to grant them limited access.

1. Navigate to Setup > Permission Sets.
2. Clone the Amp Impact Admin permission set.
3. Based on the user profile, edit the permission set by removing any permissions that are unnecessary for the user to use Amp Impact.
4. Once the permission set has been customized per the user profile, assign the permission set to the relevant user(s) by clicking "Manage Assignments".
5. If specific permission requirements are determined during configuration (e.g., restriction of certain edit privileges), System Admin may need to modify/clone this permission set or modify user permissions on an individual profile level to achieve these requirements.
6. Additionally, certain permission and sharing setups (i.e., restricting "create" access for certain objects for some user groups, make individual tabs available but not the entire app) may require

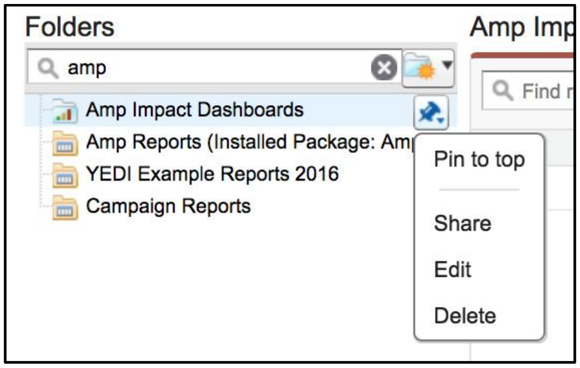
the System Admin to make additional changes to existing user permissions & record sharing setup leveraging the standard Salesforce platform security & sharing features.

ⓘ **Admin Note:**
The Amp Impact Admin permission set does not contain permissions to either the Project Role or Organization Role objects, as there is a Salesforce limitation in which permission sets in managed packages cannot provide access to custom objects that are "detail" to standard Salesforce objects in a master-detail relationship.

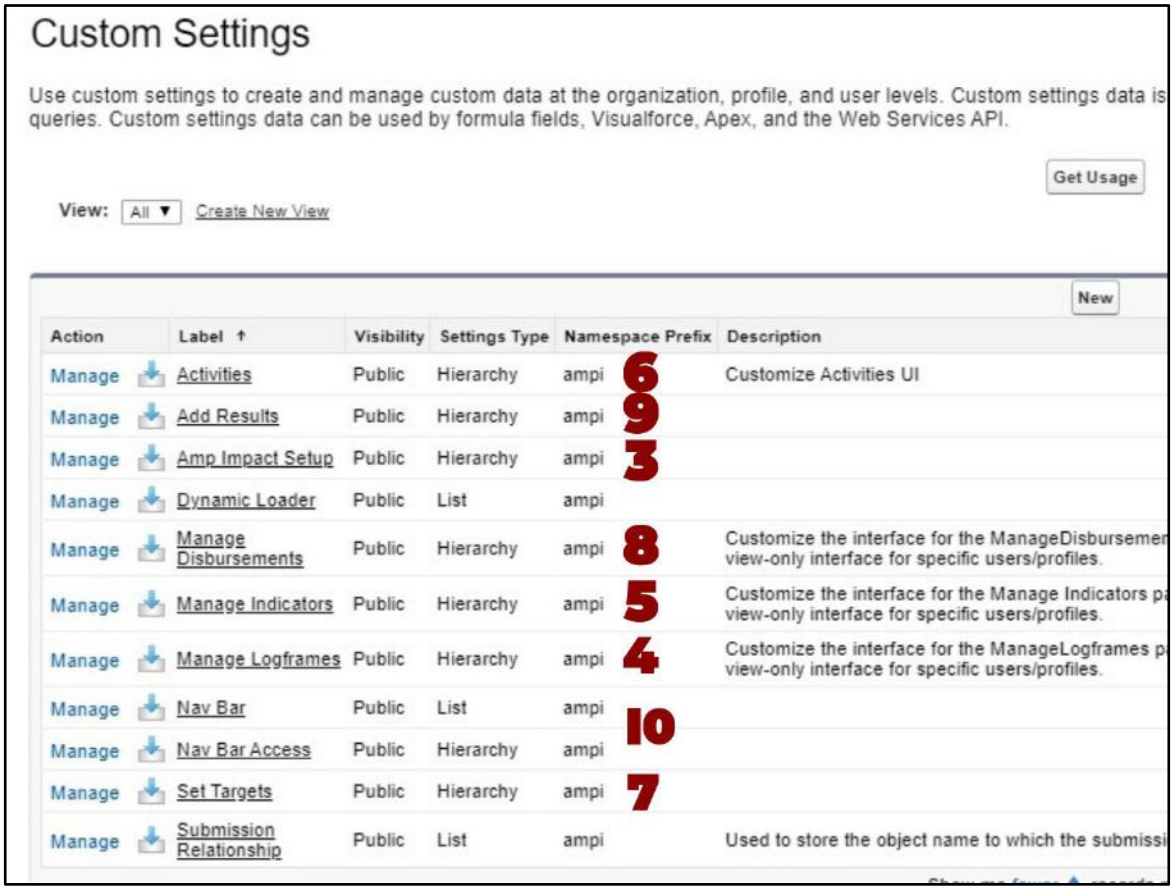
To provide access to either of these objects, create a new permission set (or modify an existing unmanaged permission set) and add both the object and field permissions manually through Object Settings. Assign this new permission set to any users who require access to Project Role and Organization Role.

Reports Access: Vera has also set up a report folder - Amp Reports. Share this folder in order to grant users view/edit/manage access to the report content, or create and share new report folders.

1. To share the folder with other users, navigate to the Reports tab, and click on the folder "Amp Reports".
2. Select the pin next to the folder name and select "Share".
3. Then share with desired users.



Custom Settings: The image below shows how to access and customize the custom settings details in the following Steps 3-7.



Custom Settings

Use custom settings to create and manage custom data at the organization, profile, and user levels. Custom settings data is queries. Custom settings data can be used by formula fields, Visualforce, Apex, and the Web Services API.

Get Usage

View: All ▼ Create New View

New

Action	Label ↑	Visibility	Settings Type	Namespace Prefix		Description
Manage	Activities	Public	Hierarchy	ampi	6	Customize Activities UI
Manage	Add Results	Public	Hierarchy	ampi	9	
Manage	Amp Impact Setup	Public	Hierarchy	ampi	3	
Manage	Dynamic Loader	Public	List	ampi		
Manage	Manage Disbursements	Public	Hierarchy	ampi	8	Customize the interface for the ManageDisbursemen view-only interface for specific users/profiles.
Manage	Manage Indicators	Public	Hierarchy	ampi	5	Customize the interface for the Manage Indicators pa view-only interface for specific users/profiles.
Manage	Manage Logframes	Public	Hierarchy	ampi	4	Customize the interface for the ManageLogframes pa view-only interface for specific users/profiles.
Manage	Nav Bar	Public	List	ampi	10	
Manage	Nav Bar Access	Public	Hierarchy	ampi		
Manage	Set Targets	Public	Hierarchy	ampi	7	
Manage	Submission Relationship	Public	List	ampi		Used to store the object name to which the submissi

Enable/Disable Features using Amp Impact Setup Custom Setting

Some key features in the product can be configured on/off depending on the client organization's preferences for the product. To enable or disable any of these features:

1. Go to Custom Settings and click on "Manage" next to the "Amp Impact Setup" label.
2. Create Setup preferences for specific users and profiles.

Amp Impact comes with the following features that can be enabled/disabled as needed at the user, profile, and organization level:

- **Allow Targets Column Download?**
  - Component: *Download* button on AddResults page
  - UX if TRUE: Targets and Results download into the same Excel file on click of the Download button.
  - UX if FALSE: Only Results download into the Excel file on click of the Download button.
- **Chatter Enabled For Add Results?**
  - Component: AddResults page
  - UX if TRUE: Chatter feed displays at the top of the AddResults page.
  - UX if FALSE: Chatter feed does not display at the top of the AddResults page.
- **Chatter Enabled For Manage Indicators?**
  - Component: ManageIndicators page
  - UX if TRUE: Chatter feed displays at the top of the ManageIndicators page.
  - UX if FALSE: Chatter feed does not display at the top of the ManageIndicators page.
- **Chatter Enabled For Set Targets?**
  - Component: SetTargets page
  - UX if TRUE: Chatter feed displays at the top of the SetTargets page.
  - UX if FALSE: Chatter feed does not display at the top of the SetTargets page.
- **Document Upload Enabled?**
  - Component: *Attach* button on AddResults page
  - UX if TRUE: Attach button displays on AddResults page. On click of Attach, the document upload interface appears.
  - UX if FALSE: Attach button does not display on AddResults.
- **Project Summary on Manage Disbursements?**
  - Component: Project Summary section on ManageDisbursements page

- UX if TRUE: Project Summary section displays on ManageDisbursements page, according to the PROJECT_SUMMARY field set on ampi__Project__c.
- UX if FALSE: Project Summary section is hidden on ManageDisbursements page.

- **Stop Light Enabled?**
  - Component: Total column in table on AddResults page
  - UX if TRUE: Red/yellow/green stoplight appears in Total Column for each numeric (Currency, Number, Percent) ampi__Project_Indicator__c that has the following fields populated:
    - ampi__Aim__c field on ampi__Project_Indicator__c record
    - ampi__Red_Yellow_Threshold__c field on ampi__Project_Indicator__c record
    - ampi__Yellow_Green_Threshold__c field on ampi__Project_Indicator__c record
    - Relevant Target fields on ampi__Result__c record
    - Relevant Result fields on ampi_Result__c record
  - UX if FALSE: Stoplight does not appear in Total Column.
- **Submit Results for Review Enabled?**
  - Component: Submit button on AddResults page
  - UX if TRUE: Submit button displays on AddResults page. On click of Submit, a confirmation popup to submit results will appear. Once the submission is confirmed, the page will be locked from editing.
  - UX if FALSE: Submit button does not display on AddResults page.
- **Submit Targets for Review Enabled?**
  - Component: Submit button on SetTargets page
  - UX if TRUE: Submit button displays on SetTargets page. On click of Submit, a confirmation popup to submit targets will appear. Once the submission is confirmed, the page will be locked from editing.
  - UX if FALSE: Submit button does not display on SetTargets page.
- **Validation Range Enabled?**
  - Component: Input fields on SetTargets and AddResults pages
  - UX if TRUE: SetTargets and AddResults pages flag a user if the value entered in the input field is outside of the validation range set by the following fields on ampi__Project_Indicator__c:
    - ampi__Validation_Range_Minimum__c
    - ampi__Validation_Range_Maximum__c
  - UX if FALSE: SetTargets and AddResults pages will not flag a user based on the value entered in the input field, irrespective of any values in the Validation Range fields.

If you enable any of the features mentioned above, first review the following additional information about them:

Document Upload Enabled?

Use case: This feature allows users to upload supporting documents when reporting on the Add Results page for each reporting period.
The "Document Upload Enabled?" custom setting allows admins to control if the Add Results page shows users the option to upload documents for a specific reporting period.

- Enabling the feature will display a button with an attach icon on the Add Results page. The button's help text (displayed on hover) can be edited/customized in the UPLOAD_DOCUMENTS custom label.
- If you enable this feature, also add the Documents_Required_for_RP__c field to the Reporting Period object page layout. This field lets users (e.g. Grant Managers) specify what documents they want uploaded for the particular reporting period. This field is always displayed on the pop-up that opens when a user clicks on the "Attach" button on the Add Results page.

Validation Ranges Enabled?

Use case: This feature allows a user creating a Project Indicator to specify a range of expected values for that indicator. The Set Targets and Add Results pages will be updated to live-check each value that is entered (on change of the input) to flag if an entered value falls outside the range of expected values.
The "Validation Range Enabled?" custom setting allows admins to control if the STAR pages show live error checking using a minimum and maximum value for each project indicator using the Validation_Range_Minimum__c and Validation_Range_Maximum__c fields.

- If the setting is enabled but there are no values in the two fields above, the live error checking will not work.
- If the setting is disabled then even if values exist in the two fields, the live error checking will not work.

Stop Light Enabled?

Use case: This feature allows the organization to set up red, yellow, and green icons to appear next to results to give a quick snapshot of whether a target was achieved or not.
The "Stop Light Enabled?" custom setting allows admins to control if the Add Results pages display a performance stoplight for project indicators where an Aim field value has been indicated and the Threshold values using "Red_Yellow_Threshold__c" and "Yellow_Green_Threshold__c" fields have been set.

- "Red_Yellow_Threshold__c" has a default value of 75.
- "Yellow_Green_Threshold__c" has a default value of 100.
- If either of these default values need to be modified, use automation (such as a process) to update the field value(s) after the Indicator or Project Indicator record has been created.
- If the setting is enabled, with no values in the Aim and/or both the Threshold fields, a stoplight will not show on the AddResults page.

- If the setting is disabled, even if values exist in the Aim and both Threshold fields, a stoplight will not show on the AddResults page.

Allow Targets Column Download?

- The Excel Download feature displays on the STAR pages as a button with a download icon on the Set Targets and Add Results pages. The button's help text (displayed on hover) can be edited/customized in the DOWNLOAD_EXCEL_BUTTON custom label.
    - Clicking on the button downloads a formatted Excel file for the given Project, Geographic Area, and Reporting Period currently displayed on the Set Targets or Add Results pages, containing cells for associated Result records.
        - The Excel file will not include any Result records that are associated with a Project Indicator that has been deactivated. This data can be accessed through native Salesforce from the record for the individual Project Indicator and/or using the "Deactivated Indicators Historical Data" report (available in the Amp Reports folder).
    - In addition to the "indicator description", "disaggregation value", and target/results data, all other data displayed is dependent on the fields selected in the Add Results indicator info popover or Set Targets indicator info popover field sets on the Project_Indicator__c object.
- The "Allow Targets Column Download?" custom setting enables users to select if they want to download target data with results data on the Add Results page or results data only.
    - If the setting is enabled, then both targets and results data will download.
    - If the setting is disabled, then only results data will download.

Platform Encryption Considerations

Certain Amp Impact features are impacted by encrypted fields due to Salesforce limitations regarding SOQL queries. Consider the implications and impacted functionality before applying encryption to the following features:

Aggregations

- Encrypted fields cannot be used in filters
- The following aggregate functions will not be supported:
    - MIN & MAX
- Supported aggregate functions: COUNT, AVERAGE & SUM

- De-duplication and Sex Based On will only be supported when “View Encrypted Data” permission is given to the user
- Reporting Period, Geographic Area & Disaggregation Based On will not be supported

Pages and Components

Any page or component that uses fieldset to provide flexibility to dynamically display field value will only work if “View Encrypted Data” permission is given to the user. This impact affects all pages and components where fieldsets may be customized.

The following Visualforce pages are impacted:

- ManageIndicators
- ManageFrameworks
- Set Targets
- Add Results
- ManageDisbursements

The following Lighting Components are impacted:

- Activity Chart on Activities page
- Submissions

Lastly, the following functionality is impacted:

- Financial Excel Budget and Download

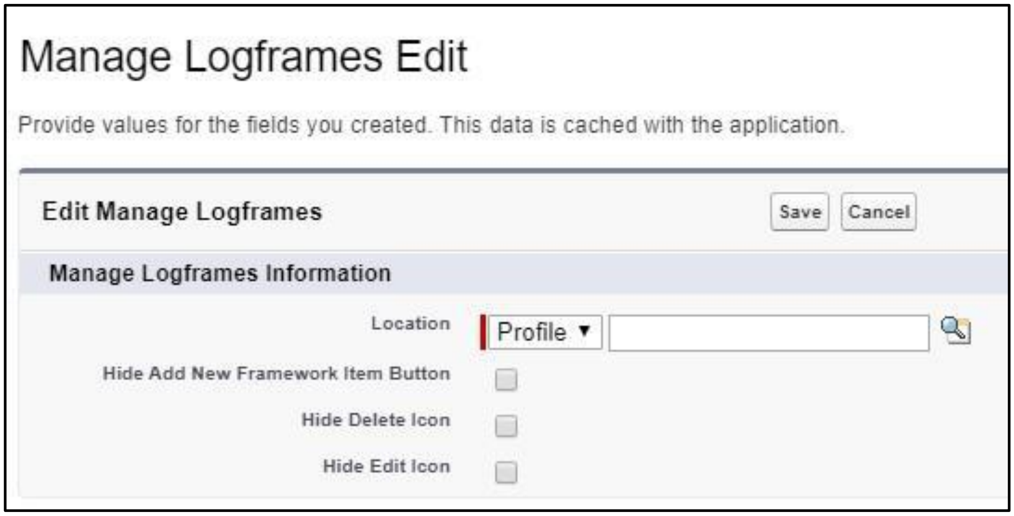
Dynamic Search Filter

- In order to search on an encrypted field, the “View Encrypted Data” permission must be given to the user
- Email, URL and Phone field types will not be supported

Display/Hide Buttons on ManageFramework

Select whether or not to hide action buttons and icons using the “Manage Logframes” custom setting.

1. Go to Custom Settings and click on “Manage” next to the “Manage Logframes” label.
2. Click on the “New” button to create a new custom setting record.
3. Create display preferences for specific users or profiles.

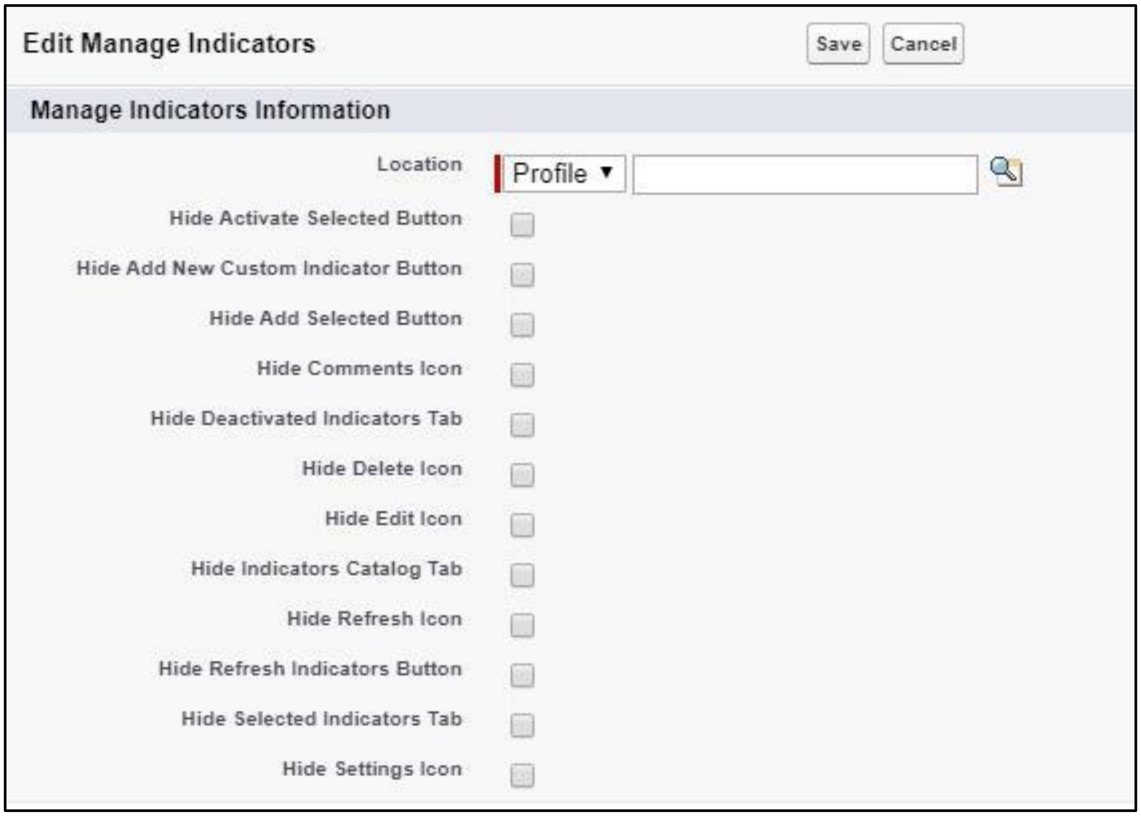


i. Hide Add New Framework Item Button
    a. Component: *Add New Framework Item* button on Manage Framework page on Project record
    b. UX if TRUE: *Add New Framework Item* button is hidden for selected Profile/User
    c. UX if FALSE: *Add New Framework Item* button is visible to selected Profile/User
ii. Hide Delete Icon
    a. Component: *Delete* icon on Manage Framework page on Project record
    b. UX if TRUE: *Delete* icon is hidden for selected Profile/User
    c. UX if FALSE: *Delete* icon is visible to selected Profile/User
iii. Hide Edit Icon
    a. Component: *Edit* icon on Manage Framework page on Project record
    b. UX if TRUE: *Edit* icon is hidden for selected Profile/User
    c. UX if FALSE: *Edit* icon is visible to selected Profile/User

Display/Hide Buttons and Tabs on ManageIndicators

Select whether or not to hide action buttons and icons using the “Activities” custom setting.

1. Go to Custom Settings and click on “Manage” next to the “Activities” label.
2. Click on the “New” button to create a new custom setting record.
3. Create display preferences for specific users or profiles.



i. Hide Activate Selected Button on Deactivated Indicators tab
   a. Component: *Activate Selected* button on Deactivated Indicators tab of ManageIndicator page on Project record
   b. UX if TRUE: *Activate Selected* button is hidden for selected Profile/User
   c. UX if FALSE: *Activate Selected* button is visible to selected Profile/User
ii. Hide Add New Custom Indicator button on Indicator Catalog tab
   a. Component: *Add New Custom Indicator* button on Indicator Catalog tab of ManageIndicator page on Project record
   b. UX if TRUE: *Add New Custom Indicator* button is hidden for selected Profile/User
   c. UX if FALSE: *Add New Custom Indicator* button is visible to selected Profile/User
iii. Hide Add Selected button on Indicator Catalog tab
   a. Component: *Add Selected* button on Indicator Catalog tab of ManageIndicator page on Project record
   b. UX if TRUE: *Add Selected* button is hidden for selected Profile/User
   c. UX if FALSE: *Add Selected* button is visible to selected Profile/User
iv. Hide Comments icon on Project Indicator table on Selected Indicators tab

a. Component: *Comments* icon on Project Indicator table in Selected Indicators tab of ManageIndicator page on Project record
b. UX if TRUE: *Comments* icon is hidden for selected Profile/User
c. UX if FALSE: *Comments* icon is visible to selected Profile/User

v. Hide Delete icon on Project Indicator table on Selected Indicators tab
a. Component: *Delete* icon on Project Indicator table in Selected Indicators tab of ManageIndicator page on Project record
b. UX if TRUE: *Delete* icon is hidden for selected Profile/User
c. UX if FALSE: *Delete* icon is visible to selected Profile/User

vi. Hide Refresh icon on Project Indicator table on Selected Indicators tab
a. Component: *Refresh* icon on Project Indicator table in Selected Indicators tab of ManageIndicator page on Project record
b. UX if TRUE: *Refresh* icon is hidden for selected Profile/User
c. UX if FALSE: *Refresh* icon is visible to selected Profile/User

vii. Hide Edit icon on Project Indicator table on Selected Indicators tab
a. Component: *Edit* icon on Project Indicator table in Selected Indicators tab of ManageIndicator page on Project record
b. UX if TRUE: *Edit* icon is hidden for selected Profile/User
c. UX if FALSE: *Edit* icon is visible to selected Profile/User

viii. Hide Settings icon on Project Indicator table on Selected Indicators tab
a. Component: *Settings* icon on Project Indicator table in Selected Indicators tab of ManageIndicator page on Project record
b. UX if TRUE: *Settings* icon is hidden for selected Profile/User
c. UX if FALSE: *Settings* icon is visible to selected Profile/User

ix. Hide Refresh Indicators button on Selected Indicators tab
a. Component: *Refresh Indicators* button on Selected Indicators tab of ManageIndicator page on Project record
b. UX if TRUE: *Refresh Indicators* button is hidden for selected Profile/User
c. UX if FALSE: *Refresh Indicators* button is visible to selected Profile/User

x. Hide Deactivated Indicators tab on ManageIndicators page
a. Component: *Deactivated Indicators* tab on ManageIndicator page on Project record
b. UX if TRUE: *Deactivated Indicators* tab is hidden for selected Profile/User
c. UX if FALSE: *Deactivated Indicators* tab is visible to selected Profile/User

xi. Hide Selected Indicators tab on ManageIndicators page
a. Component: *Selected Indicators* tab on ManageIndicator page on Project record
b. UX if TRUE: *Selected Indicators* tab is hidden for selected Profile/User
c. UX if FALSE: *Selected Indicators* tab is visible to selected Profile/User

xii. Hide Indicator Catalog tab on ManageIndicators page

a. Component: *Indicator Catalog* tab on ManageIndicator page on Project record
b. UX if TRUE: *Indicator Catalog* tab is hidden for selected Profile/User
c. UX if FALSE: *Indicator Catalog* tab is visible to selected Profile/User

Display/Hide Buttons on ActivityTracking

Select whether or not to hide action buttons and icons using the “Activities” custom setting.

d. Go to Custom Settings and click on “Manage” next to the “Activities” label.
e. Click on “New” button to create a new custom setting record.
f. Create display preferences for specific users or profiles

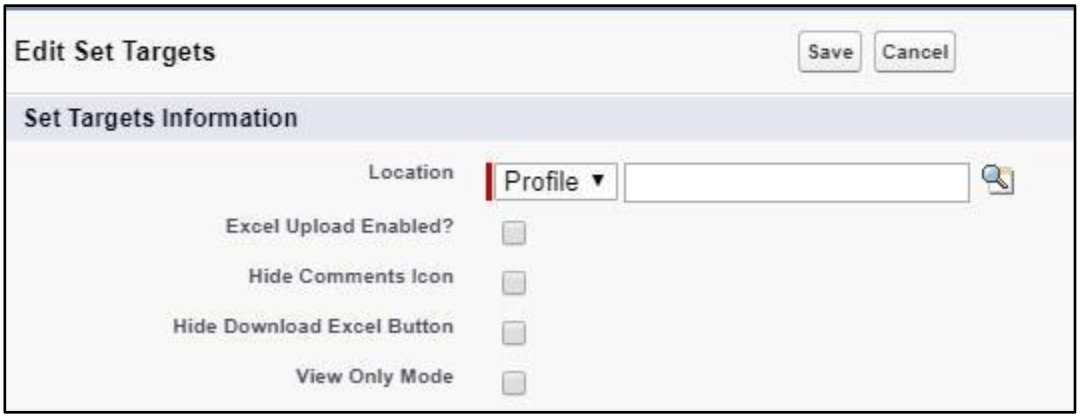
i. Hide Add New Activity Button
   - Component: *Add New Activity* button on Activities page on Project record
   - UX if TRUE: *Add New Activity* button is hidden for selected Profile/User
   - UX if FALSE: *Add New Activity* button is visible to selected Profile/User
ii. Hide Delete Icon
   - Component: *Delete* icon on Activities page on Project record
   - UX if TRUE: *Delete* icon is hidden for selected Profile/User
   - UX if FALSE: *Delete* icon is visible to selected Profile/User
iii. Hide Edit Icon
   - Component: *Edit* icon on Activities page on Project record
   - UX if TRUE: *Edit* icon is hidden for selected Profile/User
   - UX if FALSE: *Edit* icon is visible to selected Profile/User

Display/Hide Buttons or enable View Only Mode on SetTargets

Select whether or not to hide action buttons and icons, or enable view only mode using the “Set Targets” custom setting.

1. Go to Custom Settings and click on “Manage” next to the “Activities” label.
2. Click on the “New” button to create a new custom setting record.

3. Create display preferences for specific users or profiles.



i. Hide Upload Excel Button
   a. Component: *Upload Excel* button on Set Targets page on Project record
   b. UX if TRUE: *Upload Excel* button is hidden for selected Profile/User
   c. UX if FALSE: *Upload Excel* button is visible to selected Profile/User

ⓘ **Admin Note:**
When a user downloads an Excel template, they are given a set of instructions on how to properly set up the Excel sheet for upload. For any additional custom instructions that may be needed for your organization, use the custom labels to add further steps to the sections of the instructions sheet.

ii. Hide Comments Icon
   d. Component: *Comments* icon on Set Targets page on Project record
   e. UX if TRUE: *Comments* icon is hidden for selected Profile/User
   f. UX if FALSE: *Comments* icon is visible to selected Profile/User

ii. Hide Download Excel Button
   a. Component: *Download Excel* button on Set Targets page on Project record
   b. UX if TRUE: *Download Excel* button is hidden for selected Profile/User
   c. UX if FALSE: *Download Excel* button is visible to selected Profile/User

iii. View Only Mode
   a. Component: Input text-box/dropdown to input targets on Set Targets page on Project record
   b. UX if TRUE: Input text-box/dropdown to input targets is greyed out and disabled for input for selected Profile/User
   c. UX if FALSE: Input text-box/dropdown to input targets is active for selected Profile/User

Display/Hide Buttons and Target Columns or enable View Only Mode on Add Results

Select whether or not to hide target columns, action buttons and icons, or enable view only mode using the "Add Results" custom setting.

d. Go to Custom Settings and click on "Manage" next to the "Activities" label.
e. Click on the "New" button to create a new custom setting record.
f. Create display preferences for specific users or profiles.

i. Display Targets?

Select whether or not to display the Targets columns (Total Target, Male Target, Female Target, Unknown Target) on AddResults using the "Add Results" custom setting. The Targets columns will be displayed before the corresponding Results columns if the "Display Targets?" field is checked as TRUE.

- If Project Indicators are not cross-disaggregated by sex for a Reporting Period and Geographic Area combination, then only a Total Targets column will be displayed before the Total Results column.

- If at least one Project Indicator is cross-disaggregated by sex for a Reporting Period and Geographic Area combination, then four Targets columns (one Total and one per sex disaggregation value) will be displayed before the respective Results column.

PROJECT INDICATOR	TOTAL			MALE		FEMALE		UNKNOWN	
	TARGET	RESULT		TARGET	RESULT	TARGET	RESULT	TARGET	RESULT
Assessments given	300			100		100		100	
Describe level of awareness									
People impacted	3,500			1,500		1,500		500	
Percentage of clients who are female	50 %		%						

ⓘ **Admin Note:**
The display of Targets on AddResults does not control whether Target values are displayed in the Excel file downloaded from AddResults. See this section [Allow Targets Column Download?](#) to hide or display Targets in the Excel.

ii. Hide Upload Excel Button
   g. Component: *Upload Excel* button on Add Results page on Project record
   h. UX if TRUE: *Upload Excel* button is hidden for selected Profile/User
   i. UX if FALSE: *Upload Excel* button is visible to selected Profile/User

ⓘ **Admin Note:**
When a user downloads an Excel template, they are given a set of instructions on how to properly set up the Excel sheet for upload. For any additional custom instructions that may be needed for your organization, use the custom labels to add further steps to the sections of the instructions sheet.

iii. Hide Comments Icon
   a. Component: *Comments* icon on Add Results page on Project record
   b. UX if TRUE: *Comments* icon is hidden for selected Profile/User
   c. UX if FALSE: *Comments* icon is visible to selected Profile/User

iv. Hide Download Excel Button
   a. Component: *Download Excel* button on Add Results page on Project record
   b. UX if TRUE: *Download Excel* button is hidden for selected Profile/User
   c. UX if FALSE: *Download Excel* button is visible to selected Profile/User

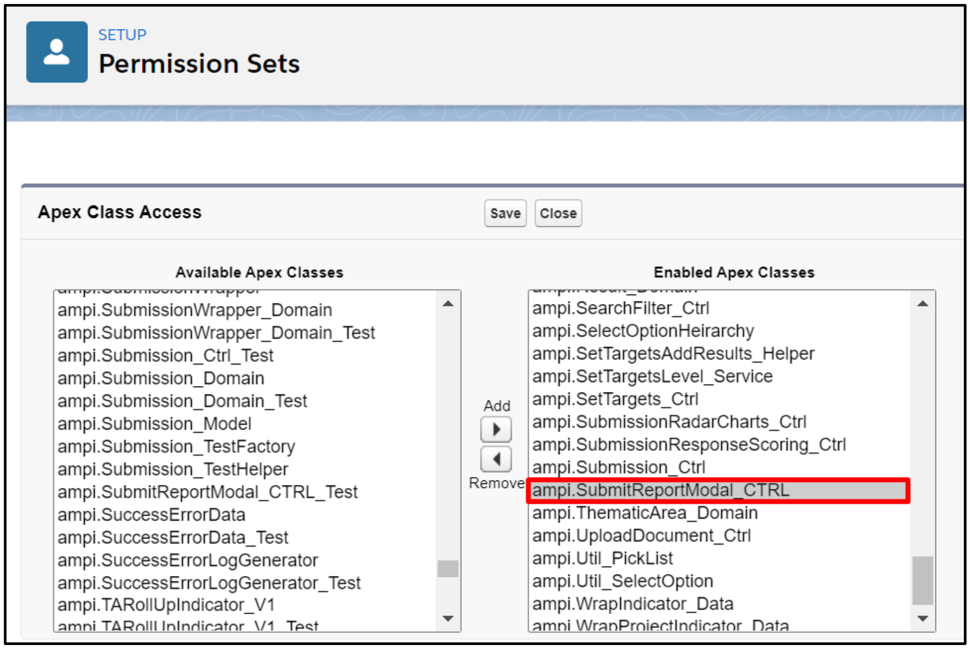
v. View Only Mode
   a. Component: Input text-box/dropdown to input targets on Add Results page on Project record
   b. UX if TRUE: Input text-box/dropdown to input targets is greyed out and disabled for input for selected Profile/User
   c. UX if FALSE: Input text-box/dropdown to input targets is active for selected Profile/User

Enable Submit button on Add Results page of Reporting Period

Out of the box, the Submit lightning action button displays to the community user but throws an error when clicked if the Add Results Visualforce page is configured on the Reporting Period record page.

Enable the Submit lightning action for the community user by following the steps below:

a. Navigate to the permission set assigned to community user
b. Click on Apex Class Access
c. Add the apex class SubmitReportModal_CTRL



Display/Hide Buttons ManageDisbursements

Select whether or not to hide action buttons and icons using “Activities” custom setting.

d. Go to Custom Settings and click on “Manage” next to the “Activities” label.
e. Click on the “New” button to create a new custom setting record.
f. Create display preferences for specific users or profiles.

i. Hide Add New Disbursement Button
    a. Component: *Add New Disbursement* button on Manage Disbursements page on Project record
    b. UX if TRUE: *Add New Disbursement* button is hidden for selected Profile/User
    c. UX if FALSE: *Add New Disbursement* button is visible to selected Profile/User

ii. Hide Delete Icon
    a. Component: *Delete* Icon on Manage Disbursements page on Project record
    b. UX if TRUE: *Delete* Icon is hidden for selected Profile/User
    c. UX if FALSE: *Delete* Icon is visible to selected Profile/User

iii. Hide Edit Icon
    a. Component: *Edit* Icon on Manage Disbursements page on Project record
    b. UX if TRUE: *Edit* Icon is hidden for selected Profile/User
    c. UX if FALSE: *Edit* Icon is visible to selected Profile/User

Salesforce Classic: Set-up Navigation Bar and determine Access

ⓘ **Admin Note:**
Organizations whose end users are on Salesforce Lightning do not need to set this Navigation Bar and can move to the next section.

The Navigation Bar allows users to navigate to and between features of Amp Impact. To set up the required Tabs in the Navigation Bar, the admin will have to create a Custom Setting record for each Visualforce page that will be used and navigated to.

1. Create a custom setting for the Navigation Bar labels and links to the relevant pages. Use this spreadsheet to upload the Tabs or follow the steps below.
2. Go to the Setup Quick Search box, and enter "Custom Settings".
3. Go to Custom Settings and click on "Manage" next to the "Nav Bar" label.
4. Click "New" and create the following, per your organization's use of Amp Impact.

Definitions

Name[1]: Text that displays in the Navigation Bar tab - can be customized per organization's terminology (e.g. "Track Metrics" instead of "Add Results").

Page API Name[2]: URL to hyperlink in the tab.

Parameters: This can be left blank for all records.

Title[1]: Text that displays on cursor hover over the Navigation Bar tab - can be customized per organization's use case (e.g. "Visualize" instead of "Performance Graphs").

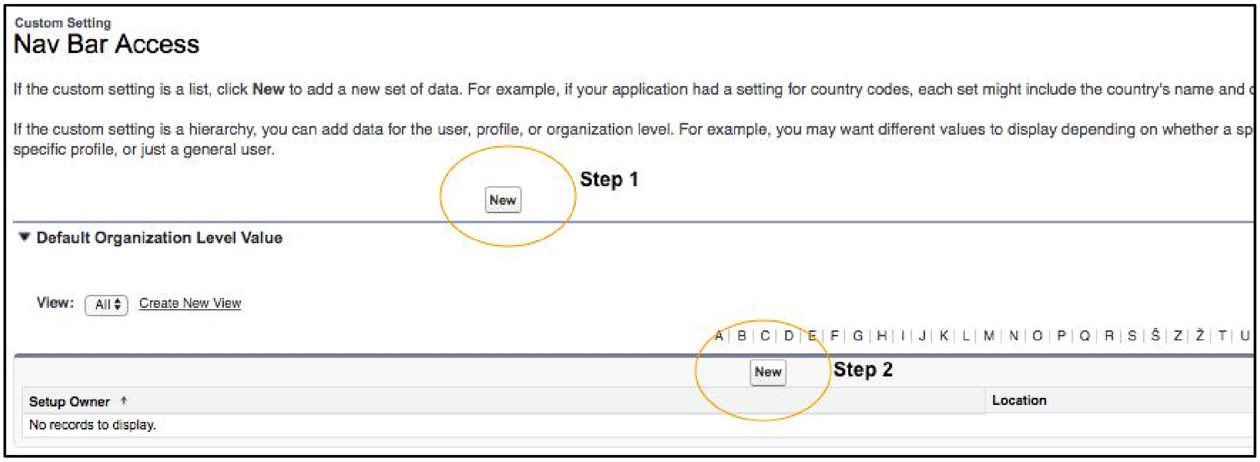
Unique Key[2]: Short string with a letter code.

Page	Name[1]	Page API Name[2]	Title[1]	Unique Key[2]
Project	Project	/apex/ampi__project	Project	proj
ManageLogframes	Manage Framework	/apex/ampi__managelogframes	Manage Framework	mf
ActivityTracking	Activity Tracking	/apex/ampi__activitytracking	Activity Tracking	at
ManageIndicators	Manage Indicators	/apex/ampi__manageindicators	Manage Indicators	mi
SetTargets	Set Targets	/apex/ampi__settargets	Set Targets	st
AddResults	Add Results	/apex/ampi__addresults	Add Results	ar
PerformanceGraph	Performance Graphs	/apex/ampi__performancegraph	Performance Graphs	pg
ManageDisbursements	Manage Disbursements	/apex/ampi__managedisbursements	Manage Disbursements	md

[1] Both Name and Title can be customized to the organization's use case. The values provided in the table are the sample values that can be used, based on the Visualforce page names.
[2] Page API Name and Unique Key are static values that need to be inputted for the Nav Bar to function correctly.

Navigation Bar Access: This is used to customize the Navigation Bar for different users e.g. Community vs. Client-organization users.

To display any part of the Navigation Bar for a certain profile or user, the admin must create a "Nav Bar Access" record for that profile or user. The admin can set a default view of the Navigation Bar for the entire organization using the Default Organization Level Value.

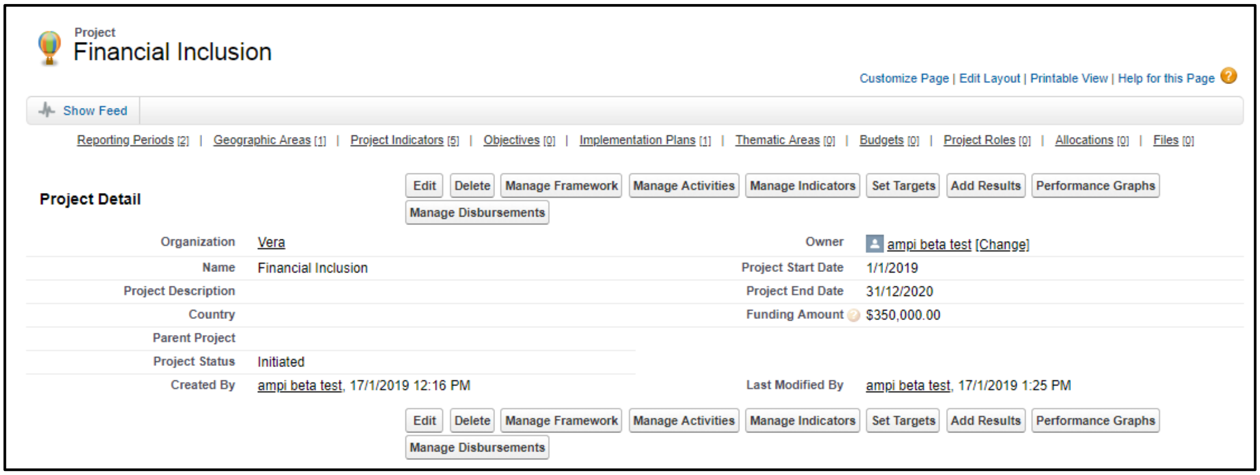


1. Go to Custom Settings and click on "Manage" next to the "Nav Bar Access" label.
2. Create a Default Organizational Level Value.
    a. Click on the "New" button - as displayed on Step 1 in the image above.
    b. In the "Available Nav Bar Items" field, enter the Unique Key for all pages that should appear on the Nav Bar. (For example, if all pages should be accessible through the Nav Bar, enter "proj, mf, at, mi, st, ar, pg, md".) For a list of the Unique Keys, look at the table on the previous page.
    c. The tabs are displayed in the order in which the Unique Keys are entered.
3. To customize for certain profiles or users, the admin must first locate the profile/user they want to create a custom Navigation Bar view for in the Location field. Then, the admin must enter a comma-separated list of the Unique Keys of the relevant Visualforce pages, in the order in which they want the tabs for those pages to appear in the Available Nav Bar Items field.
    a. For example, as an admin, I want my Community Users to only view the Project, AddResults, and PerformanceGraph pages, so I create a new Nav Bar Access record with the following information:
        i. In the "Location" field, select "Profile" and locate "Customer Community Login" in the lookup.
        ii. In the "Available Nav Bar Items" field, enter "proj,ar,pg".
        iii. The tabs are displayed in the order in which the Unique Keys are entered.

Salesforce Classic: Customize the Project record page

ⓘ **Admin Note:**
Organizations whose end users are on Salesforce Lightning do not need to set these custom buttons and can move to the next section.

Projects in Classic Experience are displayed with each of the Visualforce pages accessible through a custom button. When navigating to any of the Visualforce pages, the Nav Bar will display at the top in order to facilitate easy toggling between the pages.



- Each of the Visualforce pages is available as a custom button, following the Edit and Delete standard buttons.
- If your organization needs to change the Project's record layout in Classic because only certain pages and/or fields are utilized by users, edit those items directly in the page layout editor in Setup.
    - Control access to Visualforce pages through the Project record layout by adding/removing buttons from the button menu.
    - Control access to fields on the Project record layout by adding/removing those fields.

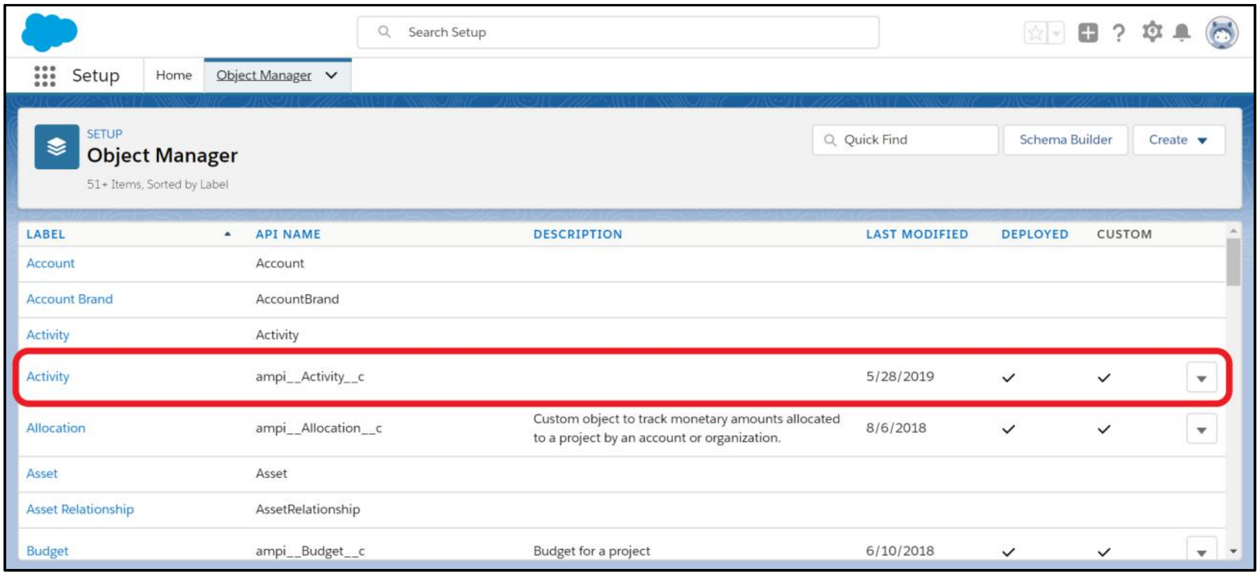
Customize Field Sets

Amp Impact uses field sets for users to add/remove fields and customize the product's features per client needs. Each field set has a list of available fields that users can choose to use. Some fields in the field set are already selected to display on installing the product. The other available fields can be added for usage, if appropriate. In addition, users can create custom fields on the relevant object and add these to the field set as well.

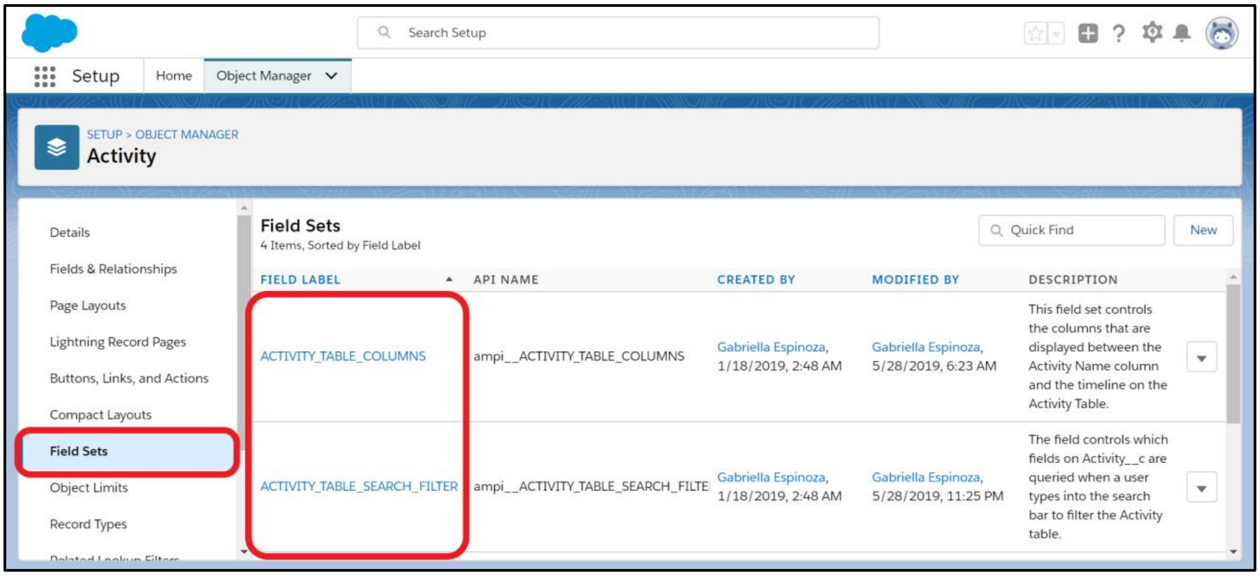
> ⓘ **Admin Note:**
> To avoid shadowing after installing Amp Impact, custom objects and fields must use different API names than the API names of Amp Impact fields. For example, if a custom Financial object is created separately from the Amp Financial object, the API name of the custom Financial object cannot be Financial__c, as it will conflict with the Amp object's API name (ampi__Financial__c). This issue can be avoided by appending numbers or codes at the end to create a unique API name (e.g. Financial_cust__c).

To edit any of the field sets, follow the instructions detailed below.

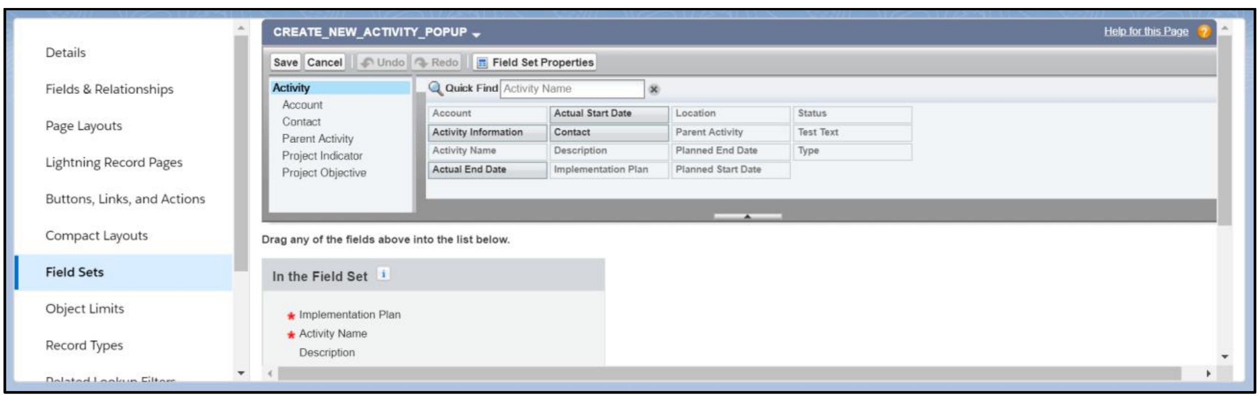
1. Identify and open the object.



2. Identify and open the field set.

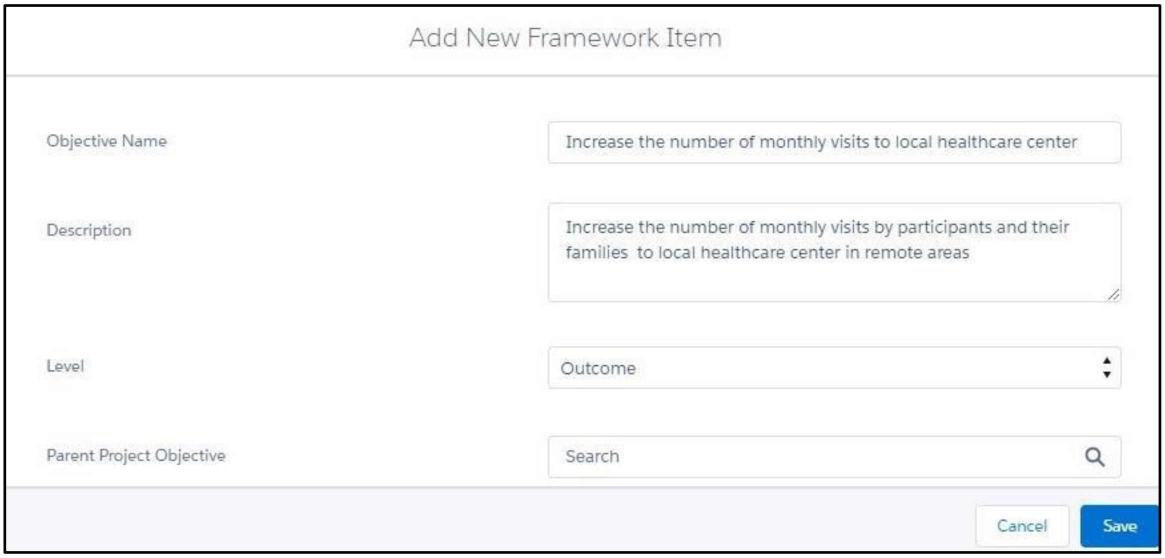


3. Edit and save the field set.

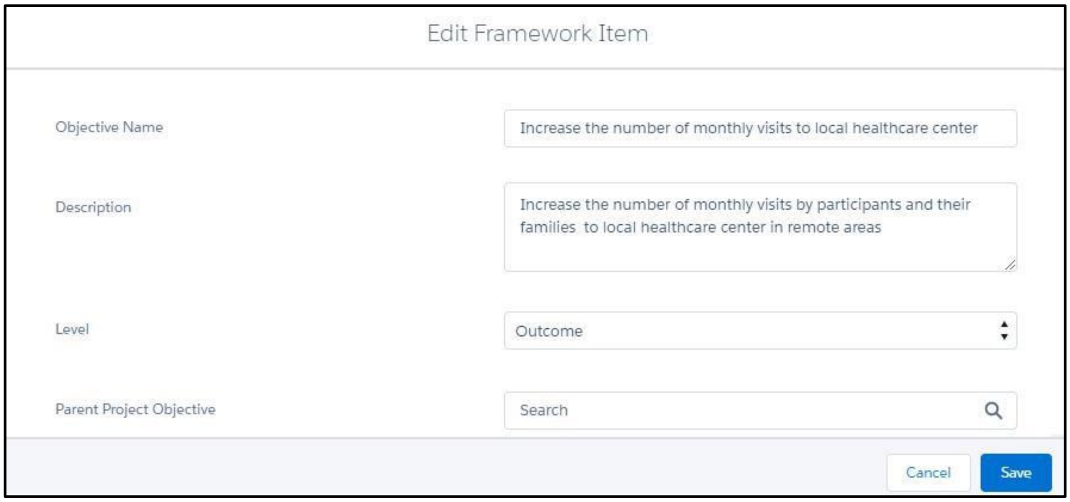


Manage Framework Visualforce page

1. Fields displayed in the “Add New Framework Item” pop-up
    a. Object: Catalog_Objective__c
    b. Field set name: ADD_NEW_OBJECTIVE_POPUP

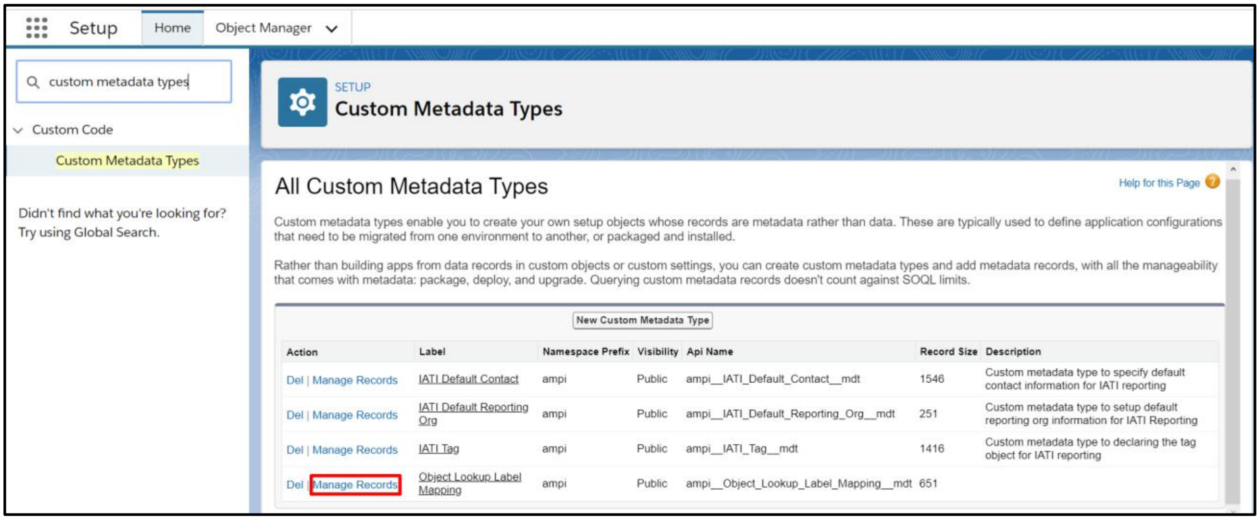


2. Fields displayed in the “Edit Framework Item” pop-up
    a. Object: Objective__c
    b. Field set name: EDIT_PROJECT_OBJECTIVE_POPUP

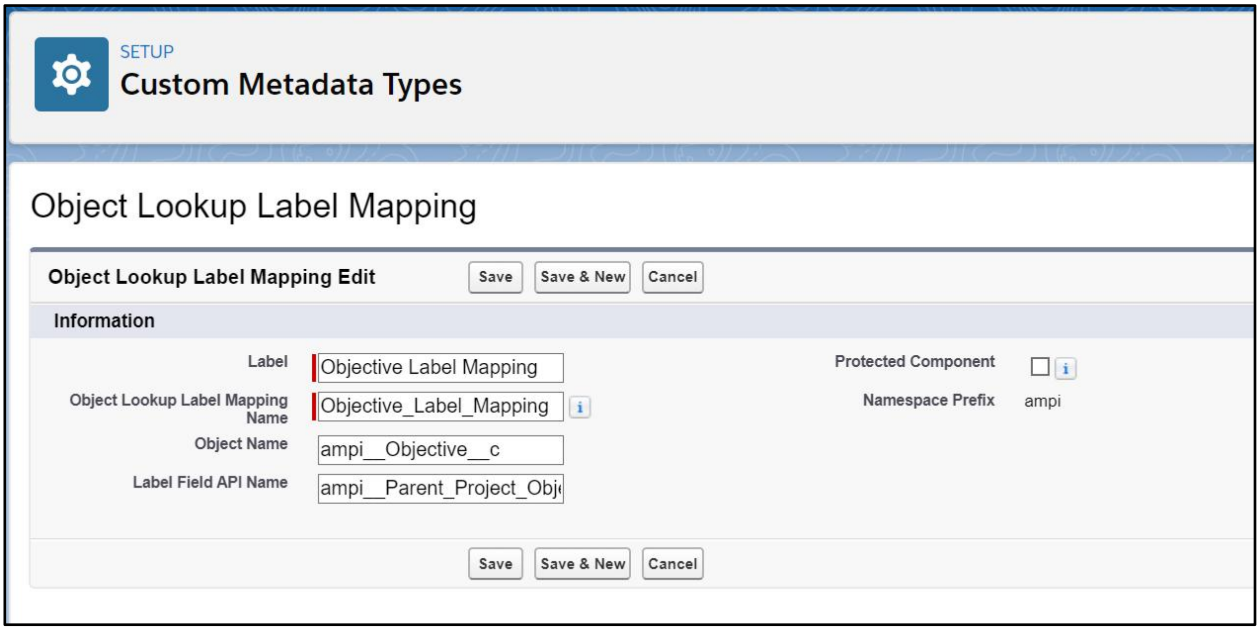


3. To add a Lookup field to the EDIT_PROJECT_OBJECTIVE_POPUP or ADD_PROJECT_OBJECTIVE_POPUP, System Admins may create a Custom Metadata Type record under Object Lookup Label Mapping (ampi__Object_Lookup_Label_Mapping__mdt) to define the field to display in components for lookups and master-detail values, based on fields on the parent Object.

a. Navigate to Setup
b. In Quick Find, search for Custom Metadata Types
a. Identify the ampi__Object_Lookup_Label_Mapping__mdt custom metadata type
b. Click *Manage Records*, as shown in the screenshot below



c. To create a new CMDT record for each Lookup field, click *New*



d. Populate the fields as follows:

i. *Label* is the identifier for the CMDT record. This may follow the format of [Object Name] Label Mapping. This is a required field.
ii. *Object Lookup Label Mapping Name* is the API name of the Label. Note that this field auto-populates when Label is populated. This is a required field.
iii. *Object Name* is the API name of the referenced parent Object.
iv. *Label Field API Name* is the API name of the specific field from the parent Object, i.e., ampi__Parent_Project_Objective__r.ampi__Label__c, to display as the label in Lookup and Master-Detail components.

e. Click *Save* or *Save and New*.
f. Note that if a custom record does not exist, the default is to display the Name field on the parent Object.

4. Column fields on the Manage Framework page - fields on the Project Objective object available to be displayed as column headers on this page
   a. Object: Objective__c
   b. Field set name: LOG_FRAMES_TABLE

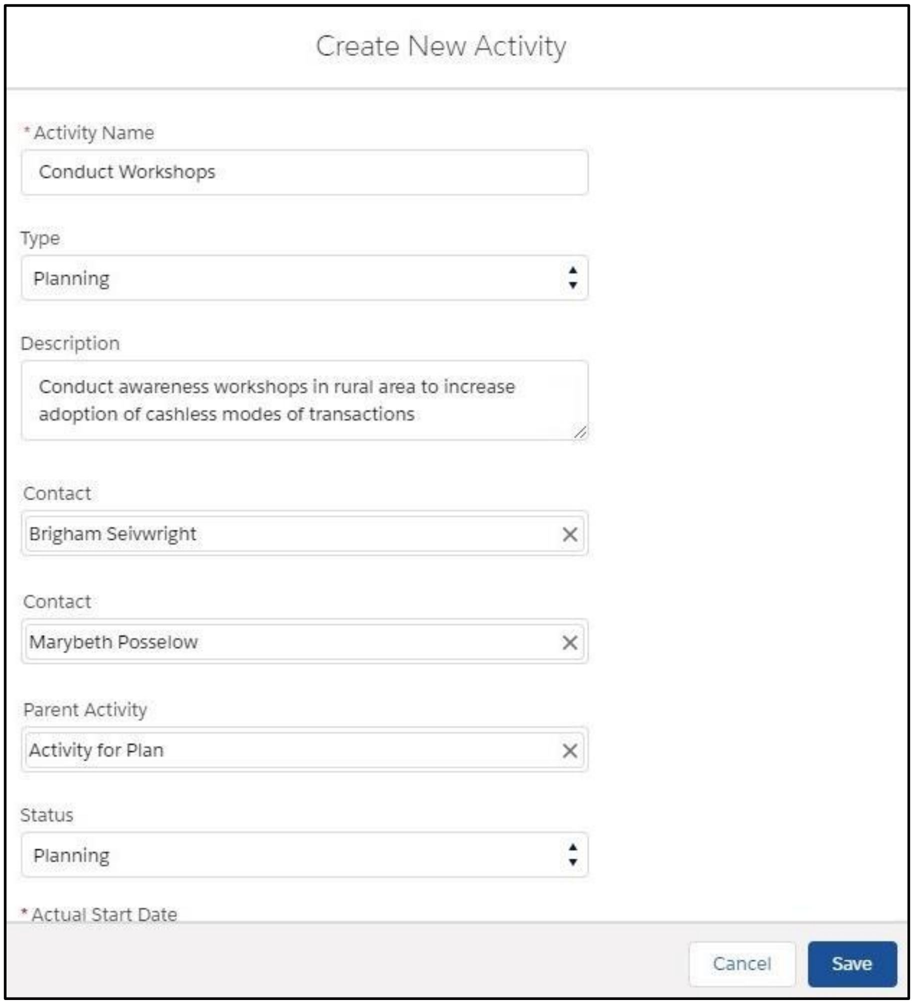
5. Column fields on the Manage Framework page - fields on the Project Indicator object available to be displayed as column headers on this page
   a. Object: Project_Indicator_Objective__c
   b. Field set name: LOG_FRAMES_TABLE

ⓘ **Admin Note:**
It is recommended to include no more than five total fields to display on the Logframes table, to be able to view the information in a user-friendly manner.

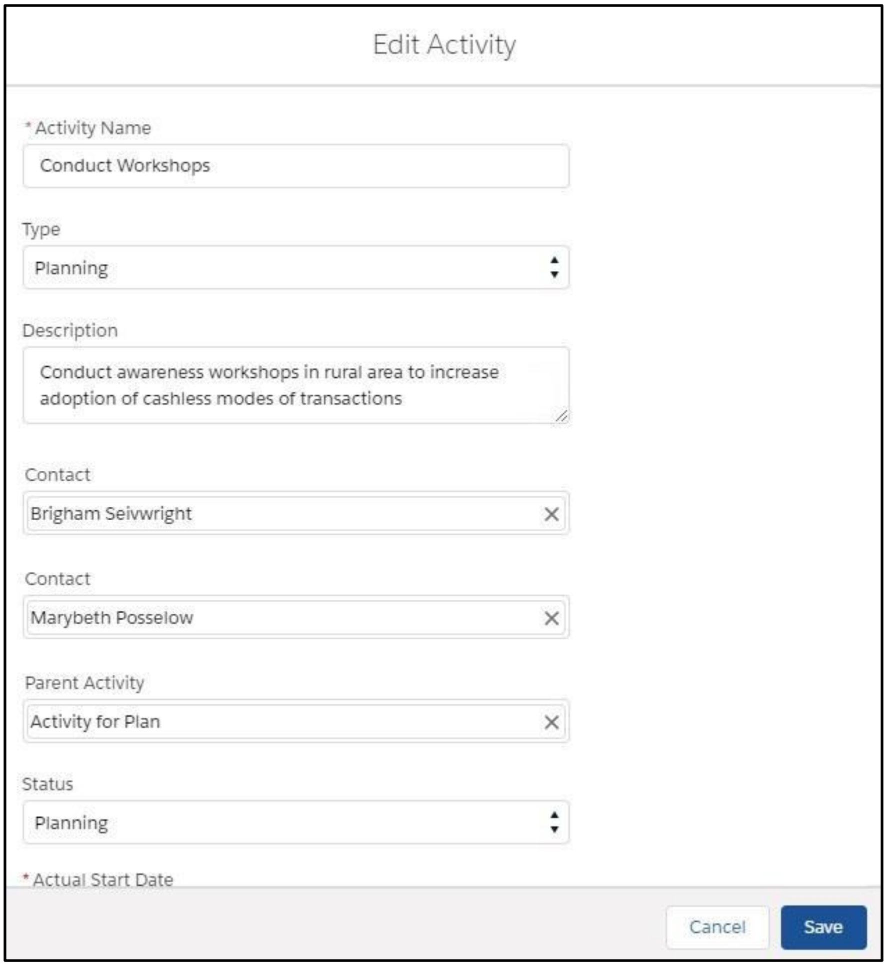
Activity Chart Lightning Component

ⓘ **Admin Note:**
The Activity field sets currently support all field types except Encrypted String and Time. The behavior of these two unsupported fields is denoted beneath each field set.

- Fields displayed in “Add New Activity” pop-up
    - Object: Activity__c
    - Field set name: CREATE_NEW_ACTIVITY_POPUP
    - Unsupported field types: Encrypted String, Time
        - Note: Implementation_Plan__c must be included in this field set in order for new Activities to be added to the correct Implementation Plan



- Fields displayed in “Edit Activity” pop-up
  - Object: Activity__c
  - Field set name: EDIT_ACTIVITY_POPUP
  - Unsupported field types: Encrypted String, Time



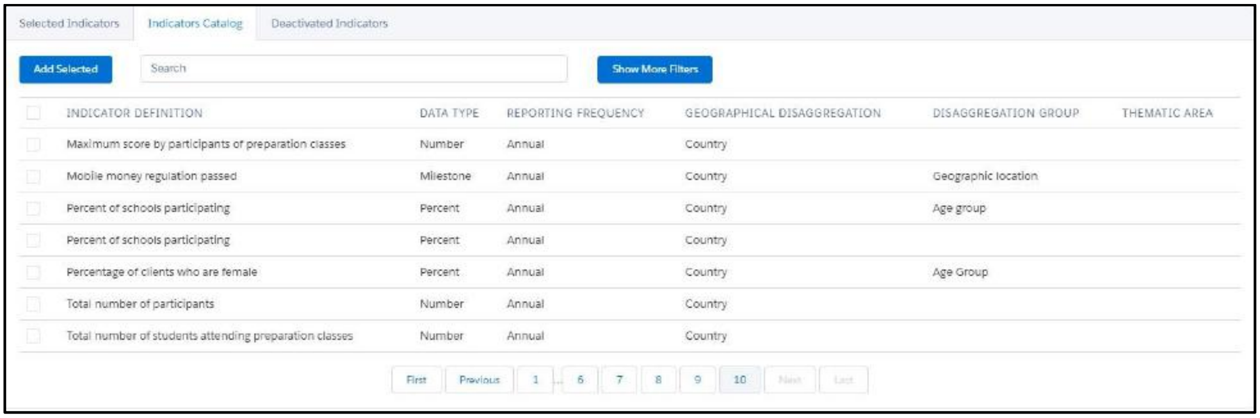
- Column fields on the Activity Chart (between Activity Name and Timeline)
    - Object: Activity__c
    - Field set name: ACTIVITY_TABLE_COLUMNS
    - Unsupported field types: Encrypted String, Time
        - If added to the field set, unsupported fields will be hidden

> ⓘ **Admin Note:**
> It is recommended to include no more than 3 fields in the Activity Table for users to be able to view the information in a user-friendly manner.

- Fields used in expanded search filters and search bar
  - Object: Activity__c
  - Field set name: ACTIVITY_TABLE_SEARCH_FILTER
  - Unsupported field types: Encrypted String, Long Text Area, Rich Text Area, Time
    - If added to the field set, unsupported fields will display an error message "Data-Type not supported".

Manage Indicators Visualforce page / Lightning Web Component

1. Column fields on the Catalog Indicators tab
   a. Object: Indicator__c
   b. Field set name: CATALOG_INDICATORS_TABLE

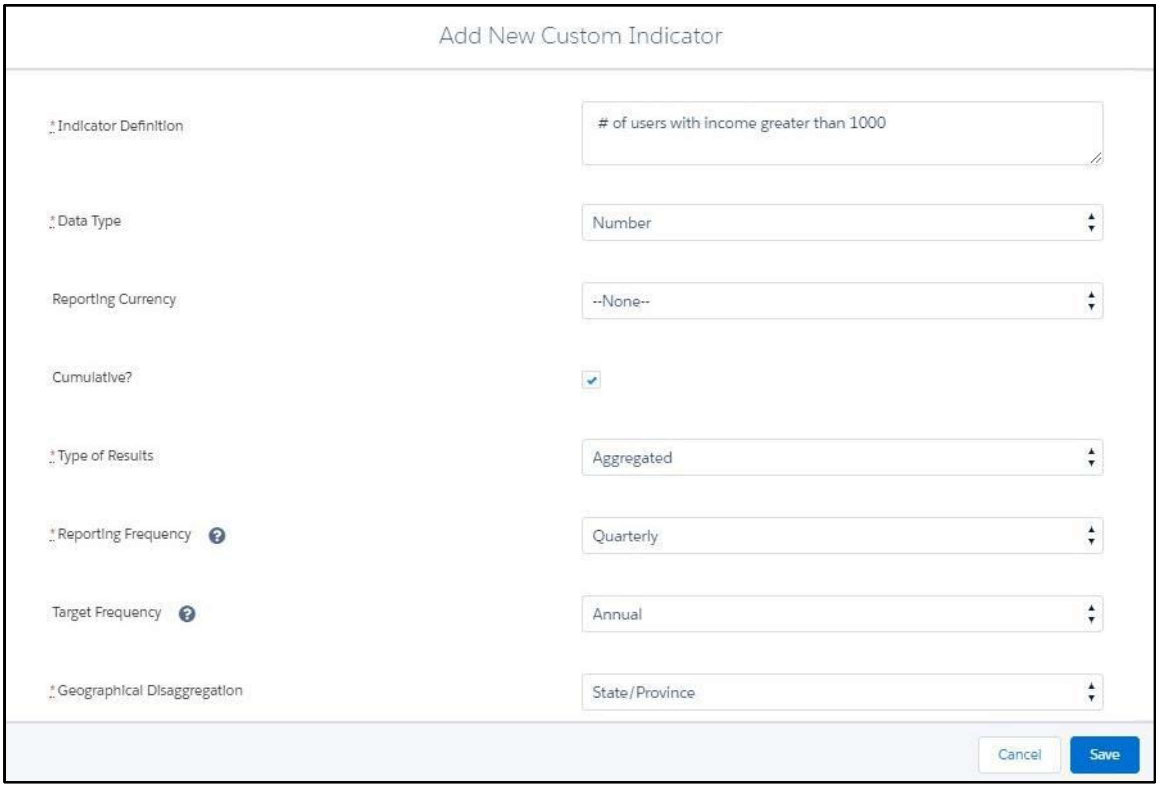


c. The columns in the table, which are based on various attributes about the indicators, such as Data Type and Reporting Frequency, are defined and can be customized by the system admin using the CATALOG_INDICATORS_TABLE field set on the Indicator__c object.
d. The first column in the table matches the first field saved to the CATALOG_INDICATORS_TABLE field set. The table displays each record in the first column as a hyperlink and is clickable to the record detail.
    i. Fields of Checkbox type can be added to the field set but do not display as a hyperlink.

ⓘ **Admin Note:**

- It is recommended to include no more than seven fields to display in the Indicators Catalog table, to be able to view the information in a user-friendly manner.
- Please note that fields on related objects cannot be added to the Indicators Catalog table.

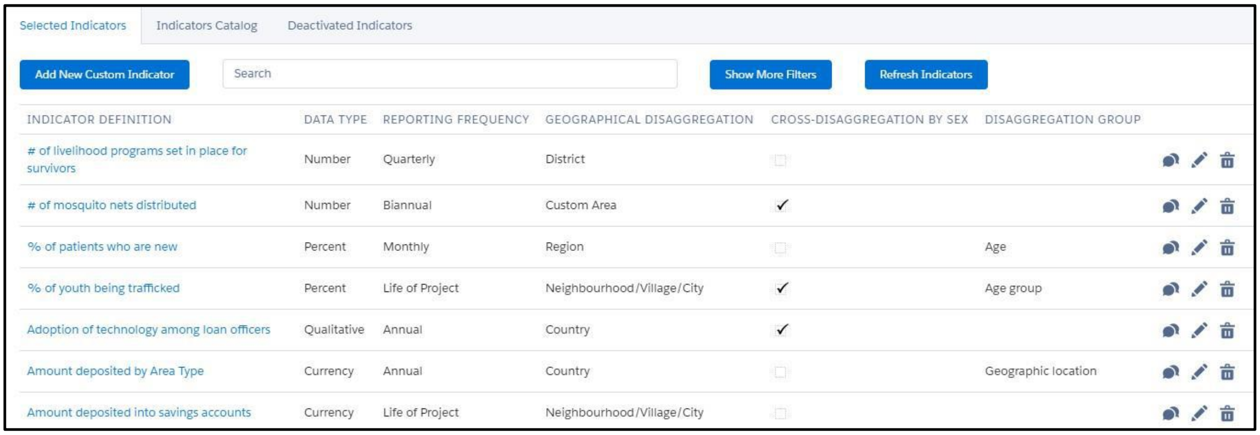
2. Fields displayed in “Add New Indicator” pop-up
    a. Object: Indicator__c
    b. Field set name: ADD_NEW_INDICATOR_POPUP



c. Some of the fields on Indicator__c have predefined default values (e.g. Include_In_Catalog). While the default value cannot be directly edited, a Process can be set up to set a custom default when an Indicator__c record is created.

d. Unsupported field types: URL

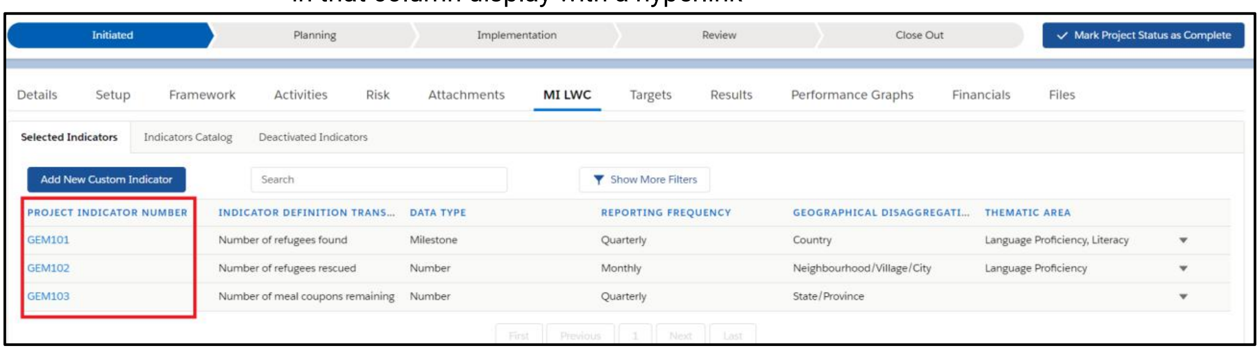
3. Column fields for the Selected Project Indicators tab
   a. Object: Project_Indicator__c
   b. Field set name: SELECTED_PROJECT_INDICATORS_TABLE



c. The columns in the table, which are based on various attributes about the project indicators, such as Data Type and Reporting Frequency, are defined and can be customized by the system admin using the SELECTED_PROJECT_INDICATORS_TABLE field set on the Project_Indicator__c object.

d. The first column in the table matches the first field saved to the SELECTED_PROJECT_INDICATORS_TABLE field set. The table displays each record in the first column as a hyperlink and is clickable to the record detail.

    i. For example, when custom field Project_Indicator__Number__c is dropped in the field set to display as the first column of the Selected Indicators table, the values in that column display with a hyperlink

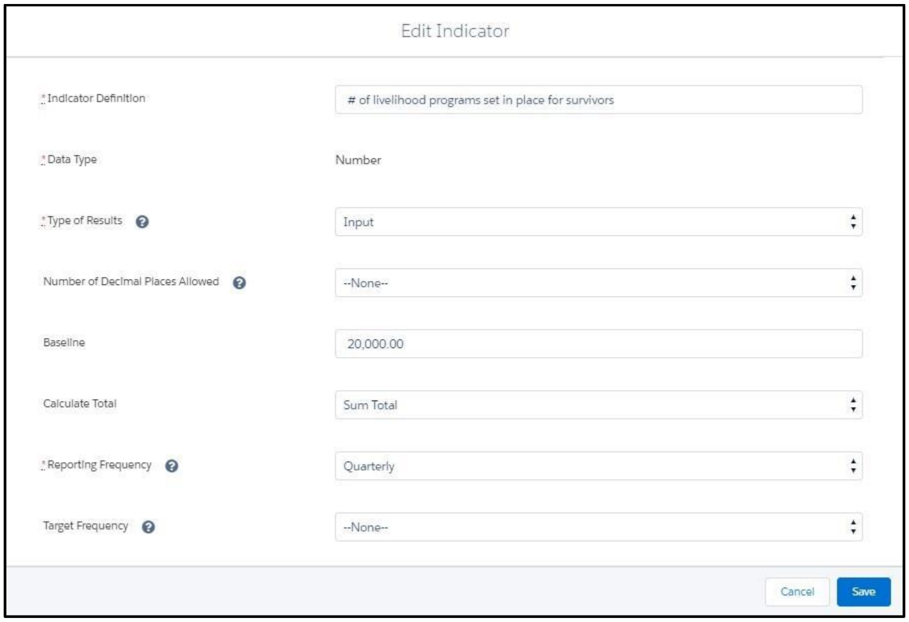


    ii. Fields of Checkbox type can be added to the field set but do not display as a hyperlink.

ⓘ **Admin Note:**

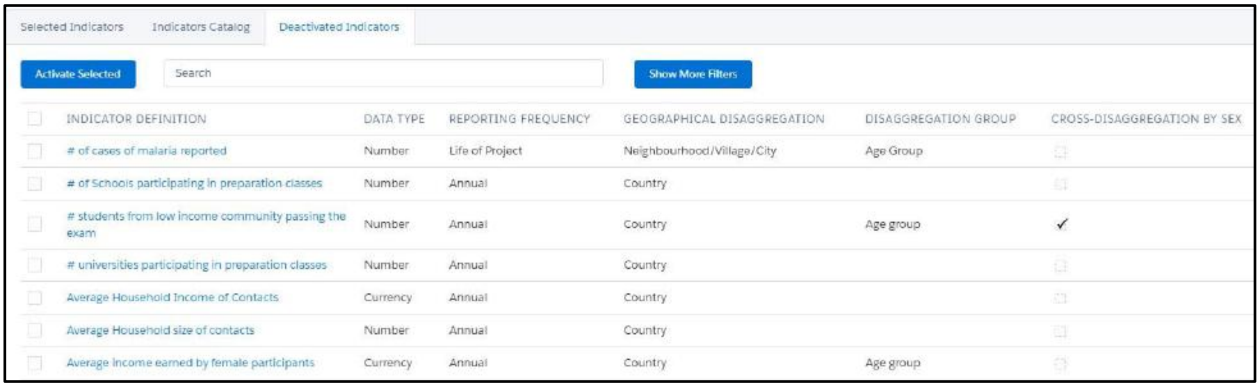
- If using the Lightning Web Component version of ManageIndicators, it is recommended to include no more than seven fields to display in the Selected Project Indicators table, to be able to view the information in a user-friendly manner.
- If using the Visualforce Page version of ManageIndicators, it is recommended to include no more than five fields to display in the Selected Project Indicators table.
- Please note that fields on related objects cannot be added to the Selected Project Indicators table

4. Fields displayed in "Edit Project Indicator" pop-up
    a. Object: Project_Indicator__c
    b. Field set name: EDIT_PROJECT_INDICATOR_POPUP
    c. Unsupported field types: URL



    d. Some of the fields on Project_Indicator__c have predefined default values (e.g. Red_Yellow_Threshold__c). While the default value cannot be directly edited, a Process can be set up to set a custom default when a Project_Indicator__c record is created.

5. Column fields for the Deactivated Indicators tab
    a. Object: Project_Indicator__c
    b. Field set name: DEACTIVATED_PROJECT_INDICATORS_TABLE



Selected Indicators | Indicators Catalog | Deactivated Indicators

Activate Selected | Search | Show More Filters

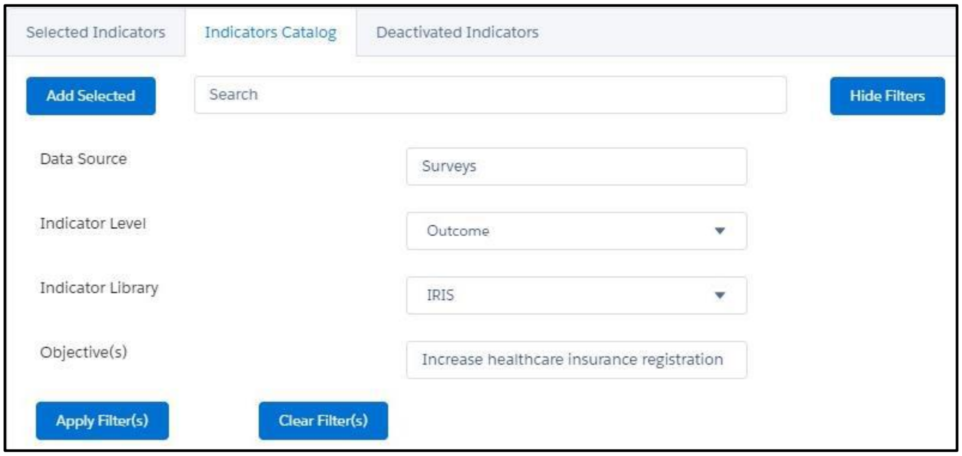
INDICATOR DEFINITION	DATA TYPE	REPORTING FREQUENCY	GEOGRAPHICAL DISAGGREGATION	DISAGGREGATION GROUP	CROSS-DISAGGREGATION BY SEX
# of cases of malaria reported	Number	Life of Project	Neighbourhood/Village/City	Age Group	
# of Schools participating in preparation classes	Number	Annual	Country		
# students from low income community passing the exam	Number	Annual	Country	Age group	✓
# universities participating in preparation classes	Number	Annual	Country		
Average Household Income of Contacts	Currency	Annual	Country		
Average Household size of contacts	Number	Annual	Country		
Average income earned by female participants	Currency	Annual	Country	Age group	

c. The first column in the table matches the first field saved to the DEACTIVATED_PROJECT_INDICATORS_TABLE field set.

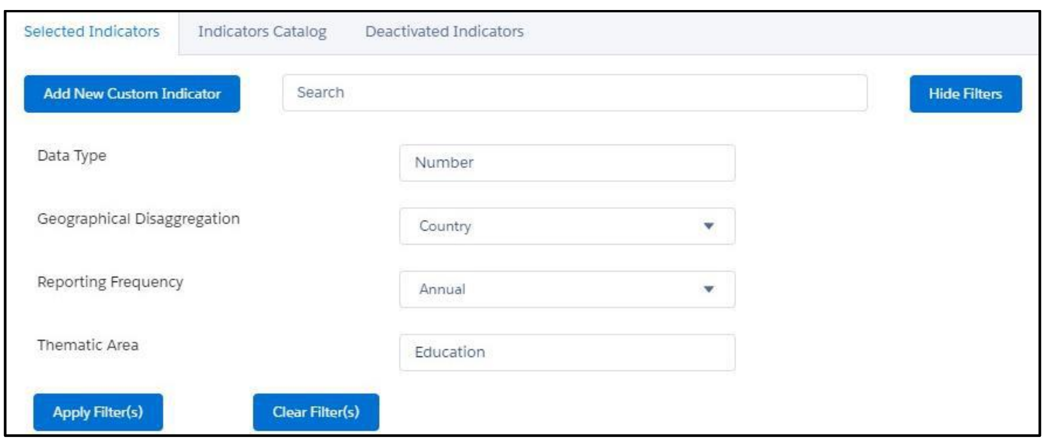
ⓘ **Admin Note:**

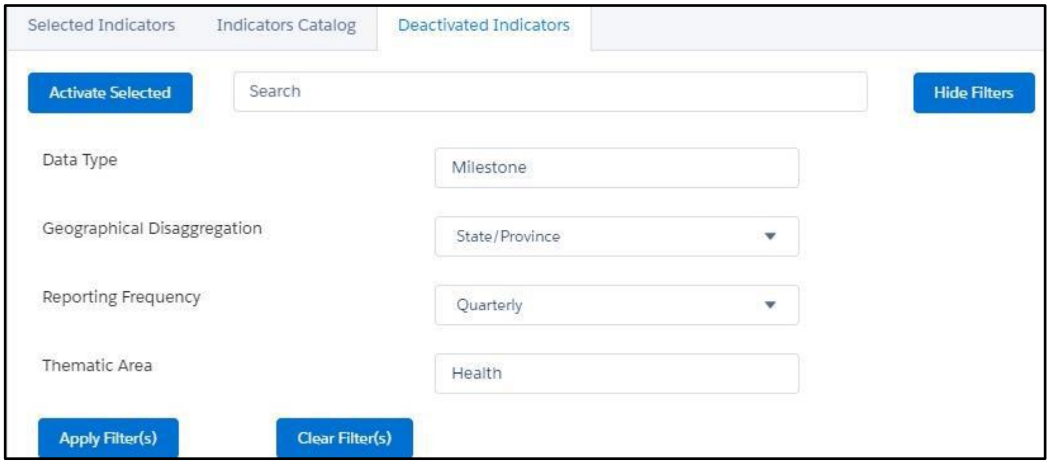
- It is recommended to include no more than seven fields to display in the Deactivated Project Indicators table to be able to view the information in a user-friendly manner.
- Please note that fields on related objects cannot be added to the Deactivated Project Indicators table

6. Fields displayed in search filter panel on the Catalog Indicators tab
    a. Object: Indicator__c
    b. Field set name: ampi__INDICATOR_CATALOG_SEARCH_FILTER
    c. Additional fields can be added to the ampi__INDICATOR_CATALOG_SEARCH_FILTER field set to filter by custom field types. The following field types are supported:
        i. Checkbox
        ii. Date
        iii. Number
        iv. Picklist
        v. Email
        vi. Phone
        vii. URL
        viii. Time
        ix. Relationship (Lookup, Master-Detail, Hierarchical)
        x. Text (Text, Text Area, Long, Rich)



7. Fields displayed in search filter panel on the Selected Project Indicators and Deactivated Indicators tabs
    a. Object: Project_Indicator__c
    b. Field set name: ampi__PROJECT_INDICATORS_SEARCH_FILTERS
    c. Additional fields can be added to the field set to filter by custom fields. The following field types are supported:
        i. Checkbox
        ii. Date
        iii. Number
        iv. Picklist
        v. Email
        vi. Phone
        vii. URL
        viii. Time
        ix. Relationship (Lookup, Master-Detail, Hierarchical)
        x. Text (Text, Text Area, Long, Rich)

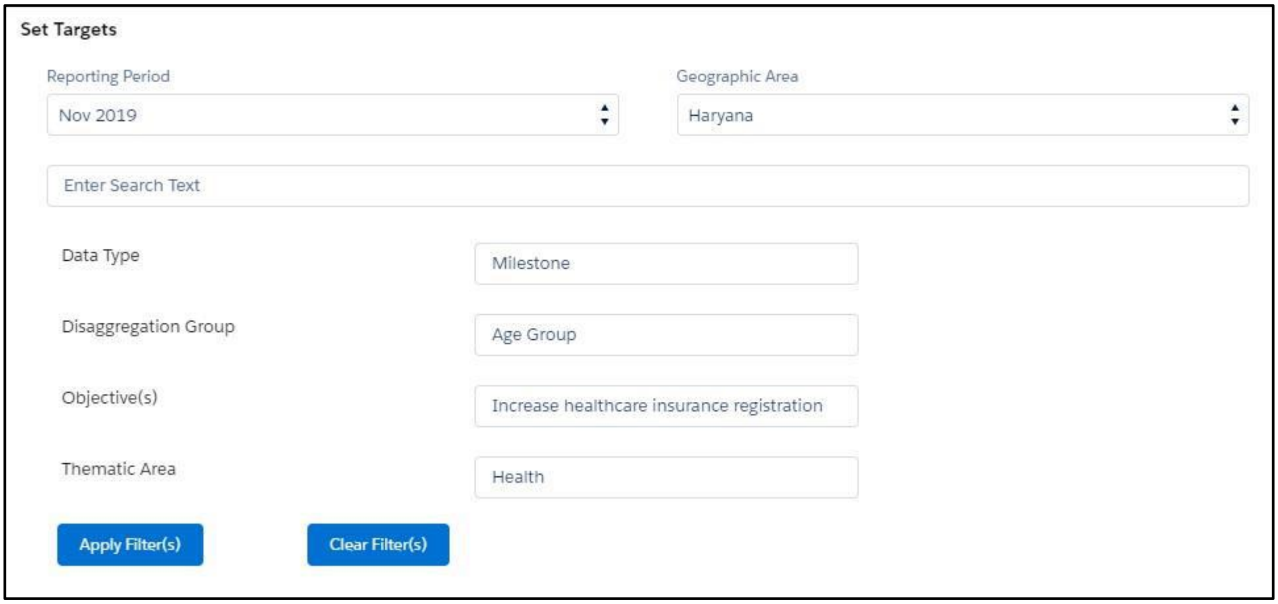




Set Targets Visualforce page

1. Indicator info popover displayed by hovering on the info icon
    a. Object: Project_Indicator__c
    b. Field set name: SET_TARGETS_INFO_POPOVER

2. Fields displayed in search filter panel
    a. Object: Project_Indicator__c
    b. Field set name: ampi__ST_SEARCH_FILTERS

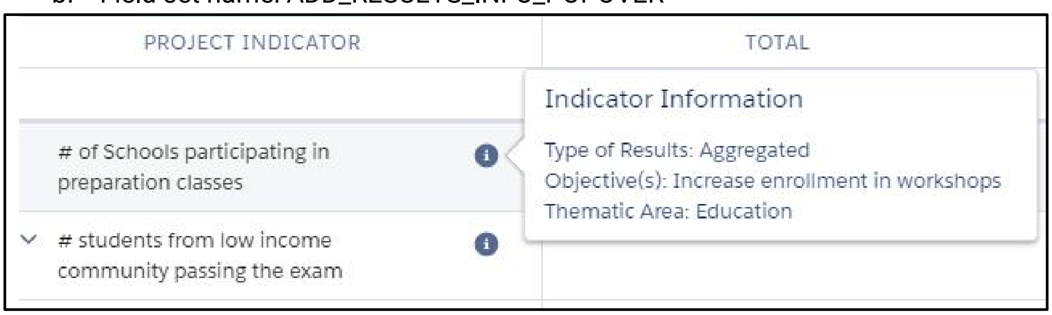


ⓘ **Admin Note:**
It is recommended to include no more than five search filter fields in the Set Targets page to be able to view the information in a user-friendly manner.

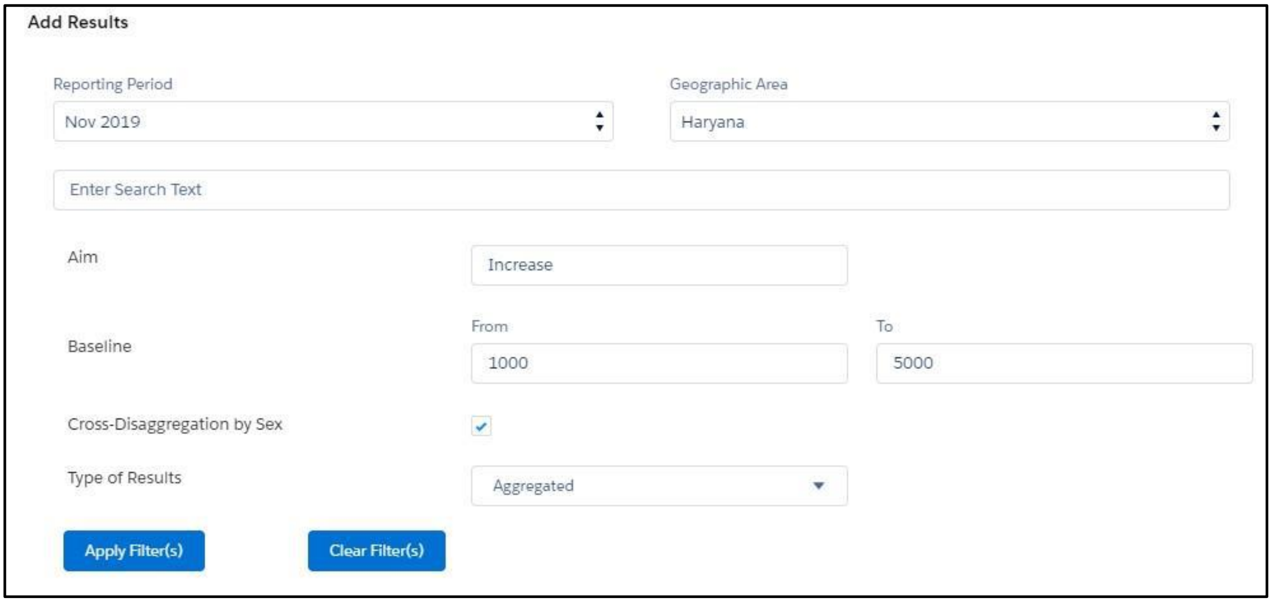
Also note that search filter fields display in alphabetical order.

Add Results Visualforce page

1. Indicator info popover displayed by hovering on the info icon
    a. Object: Project_Indicator__c
    b. Field set name: ADD_RESULTS_INFO_POPOVER



2. Fields displayed in search filter panel
    a. Object: Project_Indicator__c
    b. Field set name: ampi__AR_SEARCH_FILTERS



ⓘ **Admin Note:**
It is recommended to include no more than five search filter fields in the Add Result page to be able to view the information in a user-friendly manner.

Also note that search filter fields display in alphabetical order.

Financial Excel Download & Upload

1. Fields displayed in the downloaded Excel file from Budget__c record
    a. Object: Financial__c
    b. Field set name: BUDGET_EXCEL_COLUMNS
    c. Partially supported field types: Auto-number, Formula, Date, Date/Time
        i. Values in the Auto-number field can be downloaded in an Excel file but will throw an error when uploading the Excel.
        ii. When the financial Excel file containing a formula field is uploaded to the Budget record, the file uploads successfully without throwing any error messages in the error log. However, any values added to or updated in the formula field do not reflect in Amp Impact.

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

d. Unsupported field types: Lookup or master-detail fields on the parent object
   i. For example, ampi__Activity__r.ampi__Contact__c cannot be downloaded in the financial Excel file but ampi__Activity__c.ampi__Type__c can be downloaded.

Rural Sanitation & Health - Annual 2019

Generated by: Gabriella Espinoza 10/31/2019 1:46 AM

Name	Type	Category	Subcategory	Description	Amount Planne	Amount Actual	Cost per Unit	Unit	Quantity	Activity	Budget

> ⓘ **Admin Note:**
> It is recommended to include no more than 25 column fields in the Budget Excel Download for users to be able to view the information in a user-friendly manner.

2. Fields displayed in the downloaded Excel file from Reporting_Period__c record
   a. Object: Financial__c
   b. Field set name: REPORT_EXCEL_COLUMNS
   c. Partially supported field types: Auto-number, Formula, Date, Date/Time
      i. Values in the Auto-number field can be downloaded in an Excel file but will throw an error when uploading the Excel.
      ii. When the financial Excel file containing a formula field is uploaded to the Reporting Period record, the file uploads successfully without throwing any error messages in the error log. However, any values added to or updated in the formula field do not reflect in Amp Impact.

A	B	C	D	E	F	G	H	I	J
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

d. Unsupported field types: Lookup or master-detail fields on the parent object

i. For example, ampi__Activity__r.ampi__Contact__c cannot be downloaded in the financial Excel file but ampi__Activity__c.ampi__Type__c can be downloaded.

Rural Sanitation & Health - Annual 2019											
Generated by: Gabriella Espinoza 10/31/2019 1:46 AM											
Name	**Type**	**Category**	**Subcategory**	**Description**	**Amount Planne**	**Amount Actual**	**Cost per Unit**	**Unit**	**Quantity**	**Activity**	**Budget**

ⓘ **Admin Note:**
It is recommended to include no more than 25 column fields in the Reporting Period Excel Download for users to be able to view the information in a user-friendly manner.

Manage Disbursements Visualforce page

1. Fields displayed in the Project Summary section
    a. Object: Project__c
    b. Field set name: PROJECT_SUMMARY

Manage Disbursements

ACTIVE?	ORGANIZATION	PROJECT STATUS	PROJECT START DATE	PROJECT END DATE
	Tata Foundation	Planning	10/1/2018	10/1/2019
FUNDING AMOUNT	**PAID AMOUNT**	**TOTAL DISBURSEMENT AMOUNT**		
$500,000.00	$0.00	$0.00		

2. Fields displayed as columns in the Disbursements table
    a. Object: Disbursement__c
    b. Field set name: DISBURSEMENT_TABLE

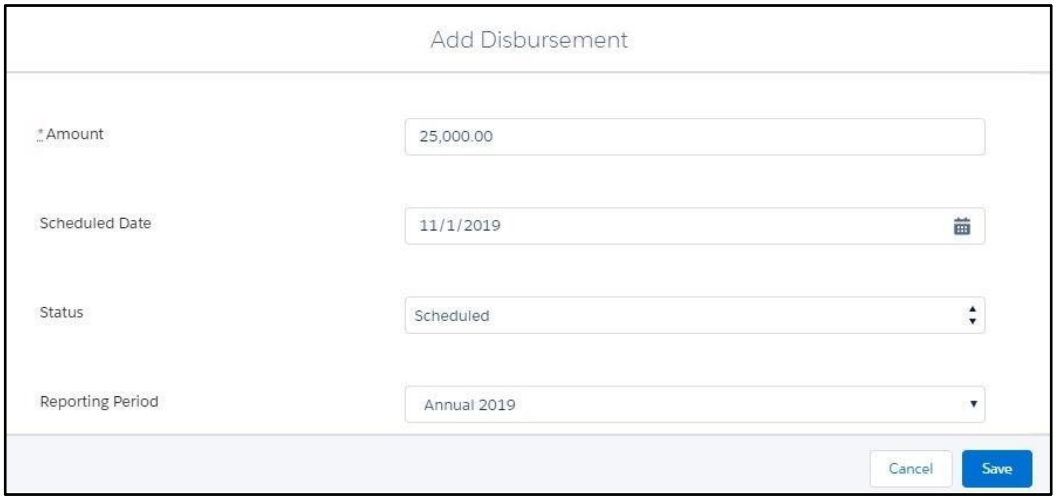
SCHEDULED DATE	AMOUNT	% OF FUNDING AMOUNT	DISBURSEMENT NAME	STATUS	REPORTING PERIOD NAME	ACTION
11/2/2019	$25,000.00	25.00%	D-0011	Pending	2019 Annual	
11/15/2019	$20,000.00	20.00%	D-0012	Scheduled	2019 Annual	
TOTAL	$45,000.00	45.00%				

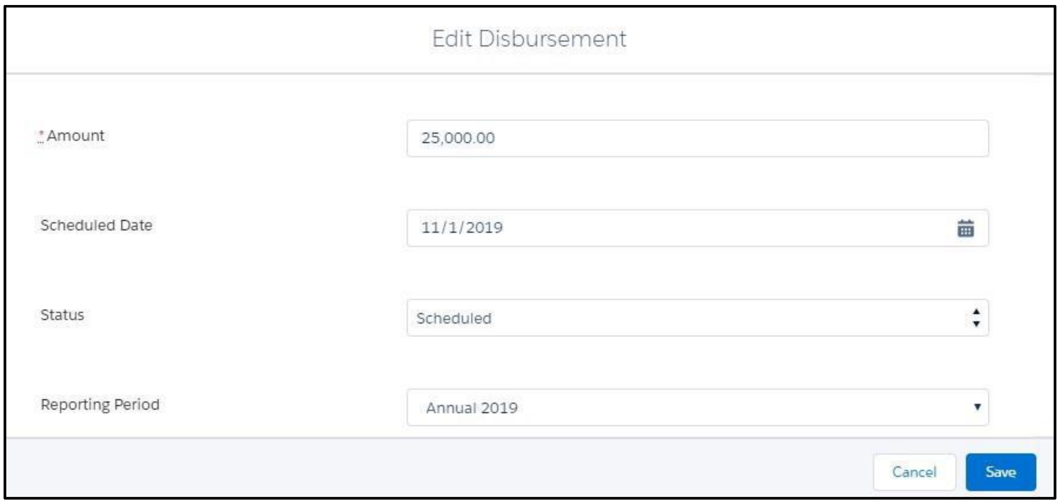
Add New Disbursement

ⓘ **Admin Note:**
It is recommended to include no more than 9 column fields in the Disbursement Table for users to be able to view the information in a user-friendly manner.

Add/Edit Disbursement pop-ups fields are controlled by two field sets - one on the Disbursement__c object and Reporting_Period__c object. This allows users additional flexibility to determine which fields are relevant for their use of the feature.

1. Add/Edit Disbursement pop-ups - fields displayed on the “Add New Disbursement” pop-up and the “Edit Disbursement” pop-up
    a. Object: Disbursement__c
    b. Field set name: ADD_EDIT_POPUP
    c. Note: Add the Reporting_Period__c lookup field in order to display the fields in the ADD_EDIT_POPUP on Reporting_Period__c
2. Add/Edit Disbursement pop-ups - Reporting Period fields displayed on the “Add New Disbursement” pop-up and the “Edit Disbursement” pop-up
    a. Object: Reporting_Period__c
    b. Field set name: ADD_EDIT_POPUP
    c. Note: Fields in this field set are only displayed if the Reporting_Period__c field is added to the ADD_EDIT_POPUP on the Disbursement__c object

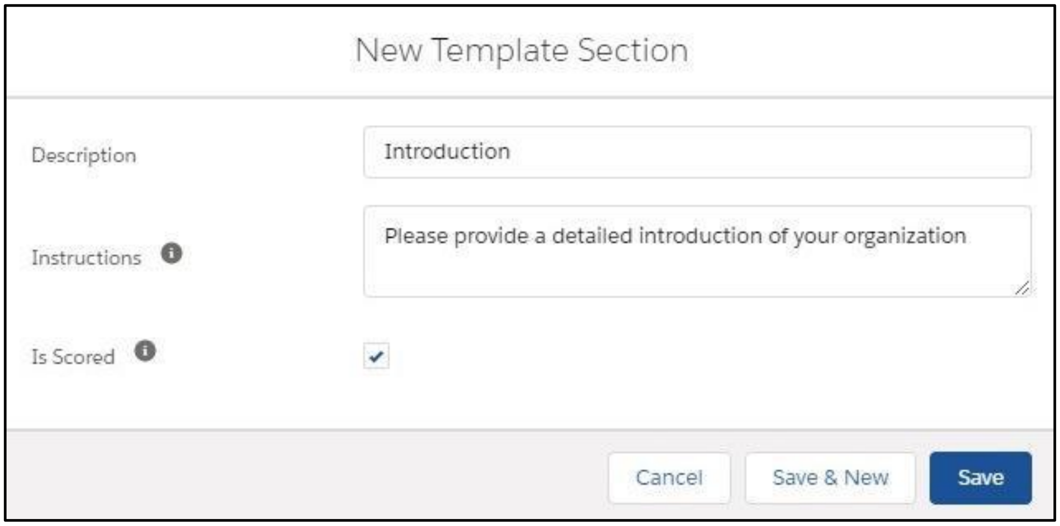


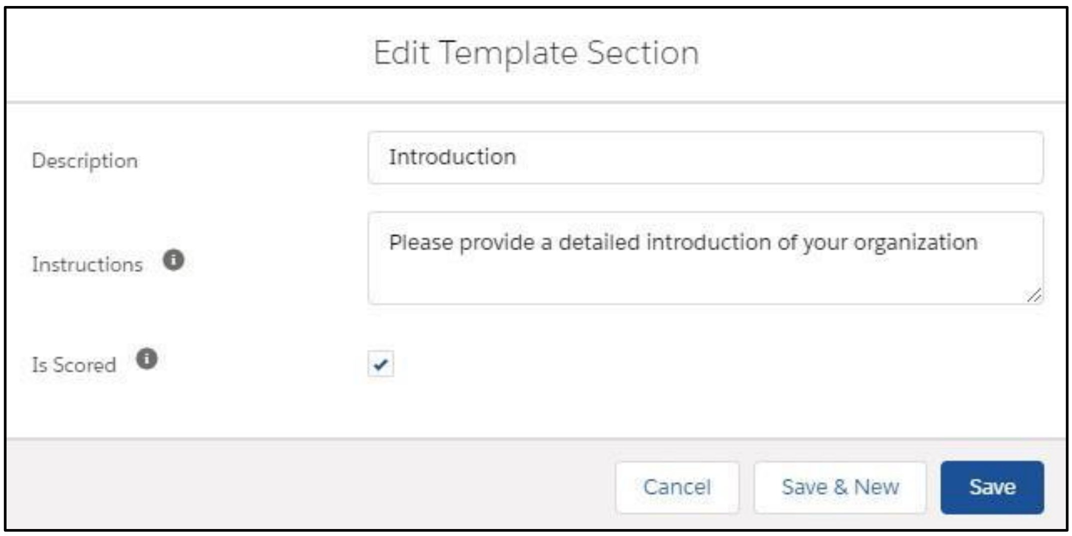


Submission Lightning Components

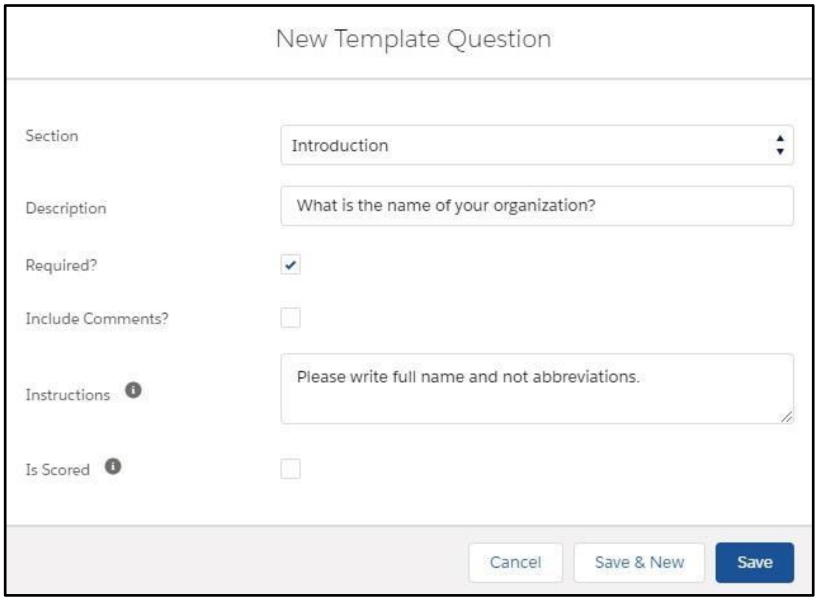
ⓘ **Admin Note:**
These field sets currently support all field types **except** Encrypted String, Multi-Select Picklist, and Time.

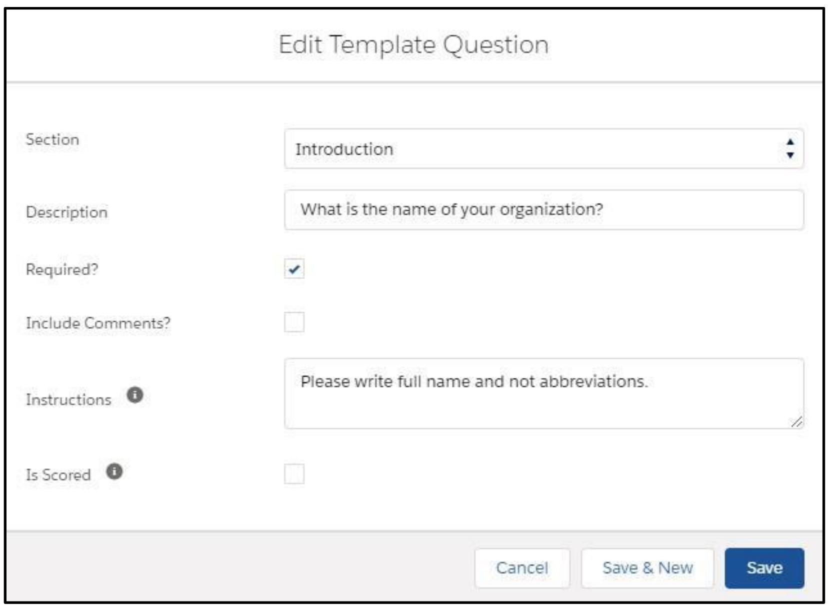
- Add/Edit Section pop-ups - fields displayed on the “Add New Section” pop-up and the “Edit Section” pop-up
  - Object: Section__c
  - Field set name: Add_Edit_Section_Popup
  - Unsupported field types: Encrypted String, Multi-select Picklist, Time





- Add/Edit Question pop-ups - fields displayed on the ‘Add New Question’ pop-up and the “Edit Question” pop-up
    - Object: Question__c
    - Field set name: Add_Edit_Question_Popup
    - Unsupported field types: Encrypted String, Multi-select Picklist, Time

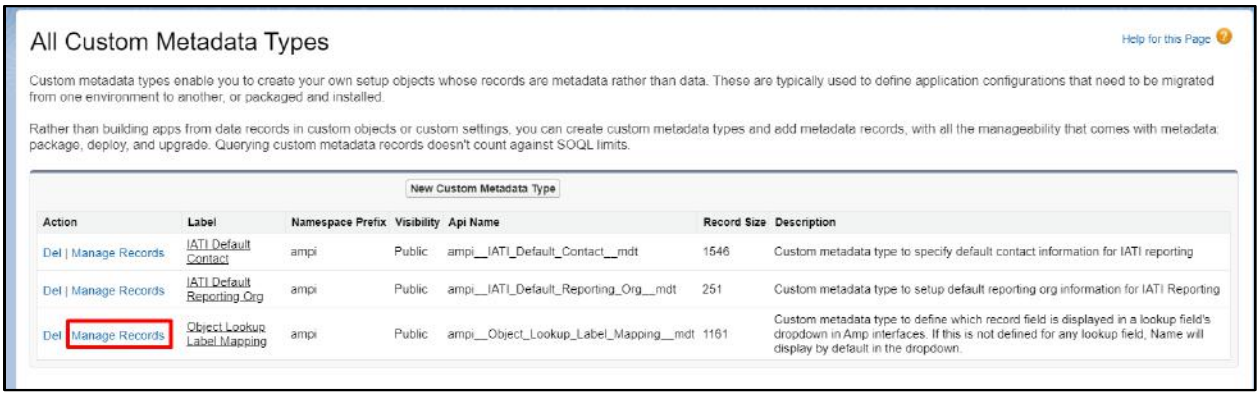

New Template Question
Section
Introduction
Description
What is the name of your organization?
Required?
Include Comments?
Instructions
Please write full name and not abbreviations.
Is Scored
Cancel
Save & New
Save


Edit Template Question
Section
Introduction
Description
What is the name of your organization?
Required?
Include Comments?
Instructions
Please write full name and not abbreviations.
Is Scored
Cancel
Save & New
Save

Customize Lookup Display Field

The System Admin may define the field to display in components for lookups and master-detail relationship fields based on fields on the parent Object by configuring Custom Metadata Type (CMDT) records under the ampi__Object_Lookup_Label_Mapping__mdt CMDT. This configuration only affects ManageIndicators as a Lightning Web Component and the Manage Frameworks Visualforce page.

1. To add a new record for customization, navigate to Setup and in the Quick Find box enter 'Custom Metadata Types'.
2. Click on 'Manage Records' to the left of the ampi__Object_Lookup_Label_Mapping__mdt CMDT, as shown below.



3. Populate the new record as follows:
   - **Label -** Label of the CMDT record should follow the convention [Child Object Name] - [Lookup Field Name]
     - e.g. Objective - Parent Objective
   - **Child Object Name**: API name of the object on which the lookup field exists
     - e.g. ampi__Objective__c
   - **Parent Object Name:** API name of the parent object in the lookup relationship
     - e.g. ampi__Catalog_Objective__c
   - **Lookup Field Name**: API name of the lookup field
     - e.g. ampi__Catalog_Objective__c
   - **Label Field API Name** (Field_To_Use__c): API name of the field to be displayed in the dropdown
     - e.g. ampi__Label__c
     - Note that Field_To_Use__c is the field API name to be used for searching the record as well as displaying the value in the lookup field on the Visualforce page.
     - The defined field cannot be a LongTextArea or RichTextArea field.

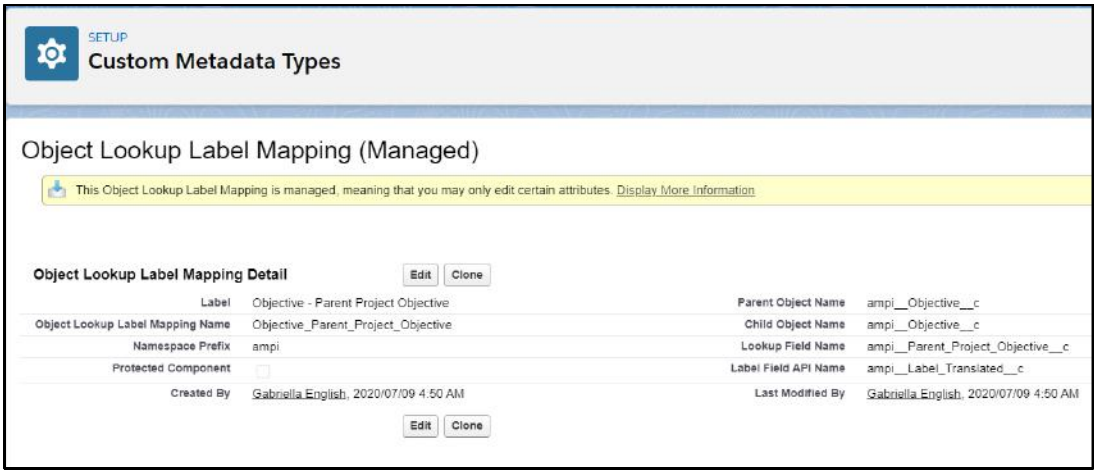
- If either field type is used as the Label Field for a relationship field in either of the Financial Excel Download field sets, the Excel Download will fail.

4. Click ‘Save’.

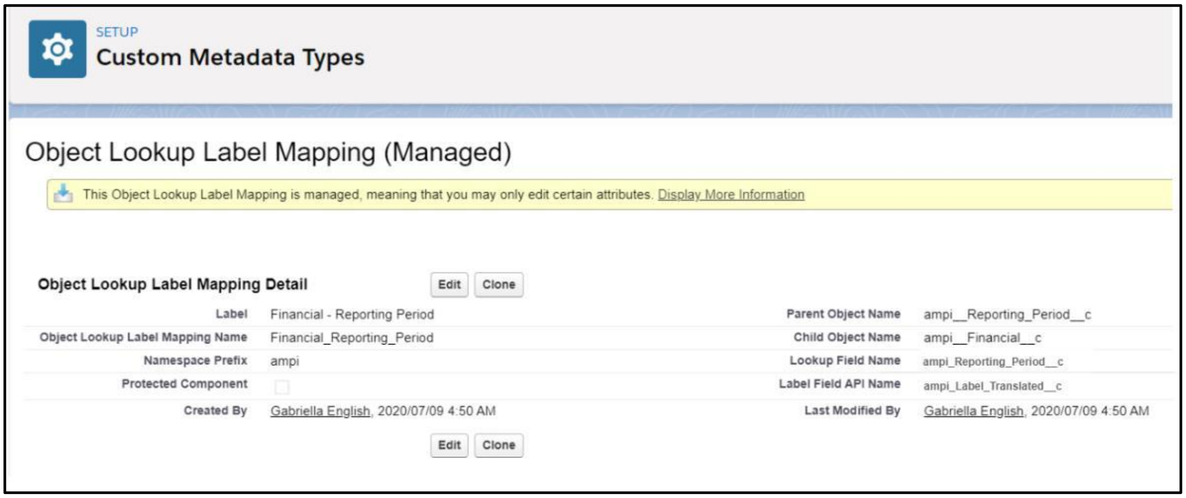
If a record under the ampi__Object_Lookup_Label_Mapping__mdt CMDT is not defined, then the default field displayed is the value from the Name field on the parent Object.

Two CMDT records on ampi__Object_Lookup_Label_Mapping__mdt are available out of the box in the Amp Impact managed package. Note that both of these CMDT records use the ampi__Label_Translated__c field instead of ampi__Label__c in the Label Field API Name such that the non-default language users who are leveraging the multi-language capability of Amp Impact can view the translated values in the lookup dropdown.

1. **Objective - Parent Project Objective:** Below is a screenshot of this CMDT record with the lookup field ampi__Parent_Project_Objective__c on Project Objective (ampi__Objective__c).

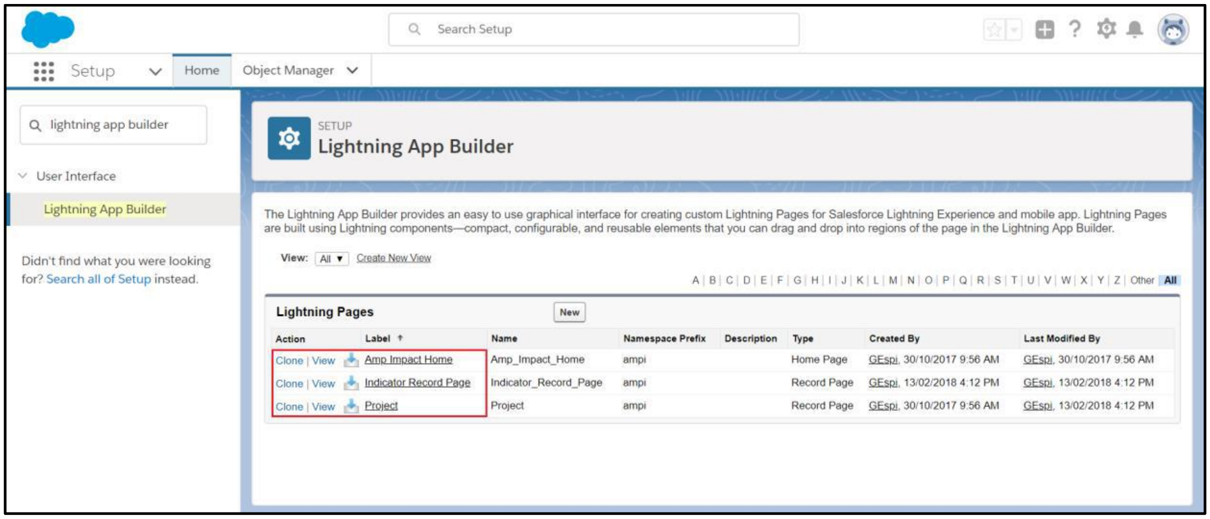


2. **Financial - Reporting Period:** Below is a screenshot of this CMDT record with the lookup field ampi_Reporting_Period__c on Financial (ampi__Financial__c).

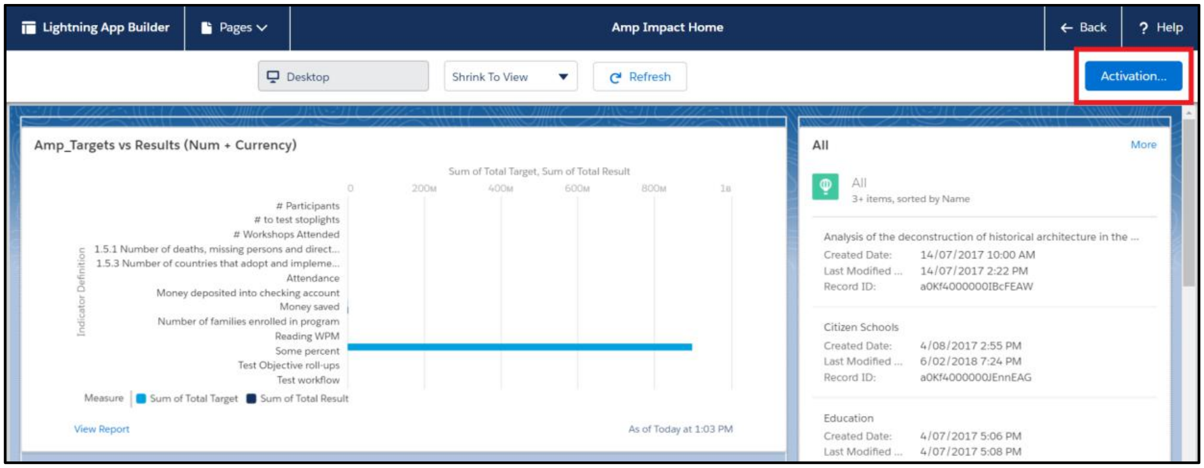


Display Lightning Pages

Amp Impact includes Lightning pages in the package: a Home page and a record page for each of the custom Amp Impact objects.



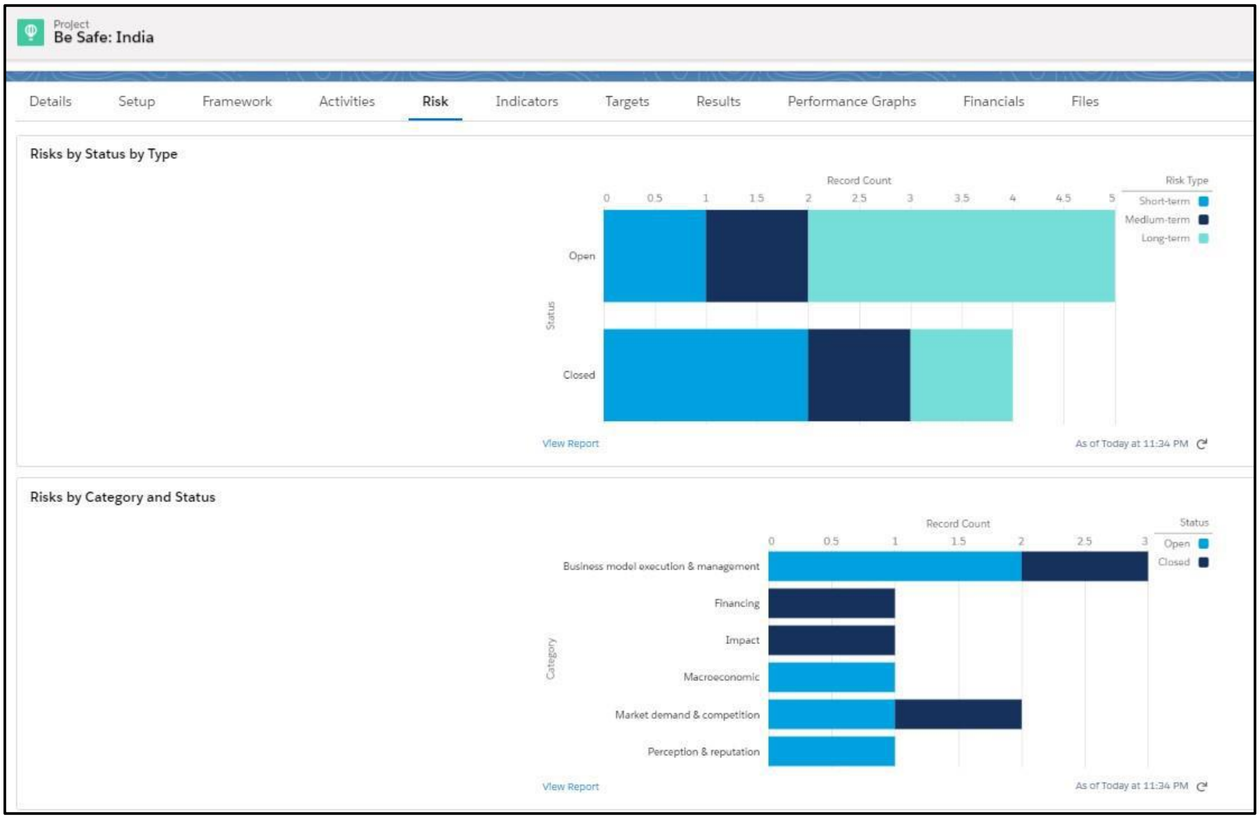
If your organization is already on Lightning and using custom Lightning pages, the Amp Home Lightning page will not display automatically if your custom Lightning Home page is activated as the org default. To display any of Amp's Lightning pages, you will need to adjust the [Activation settings] either on your custom Lightning pages by removing them as the org or app default, or on the Amp Lightning pages by setting them as the app / profile defaults. You can access the Activation settings in the Lightning App Builder.



Risk Management Tab on Project Lightning Record Page

The following report charts are offered out of the box with the Risk feature:

1. Risk by Status and Type
2. Risk by Category and Status

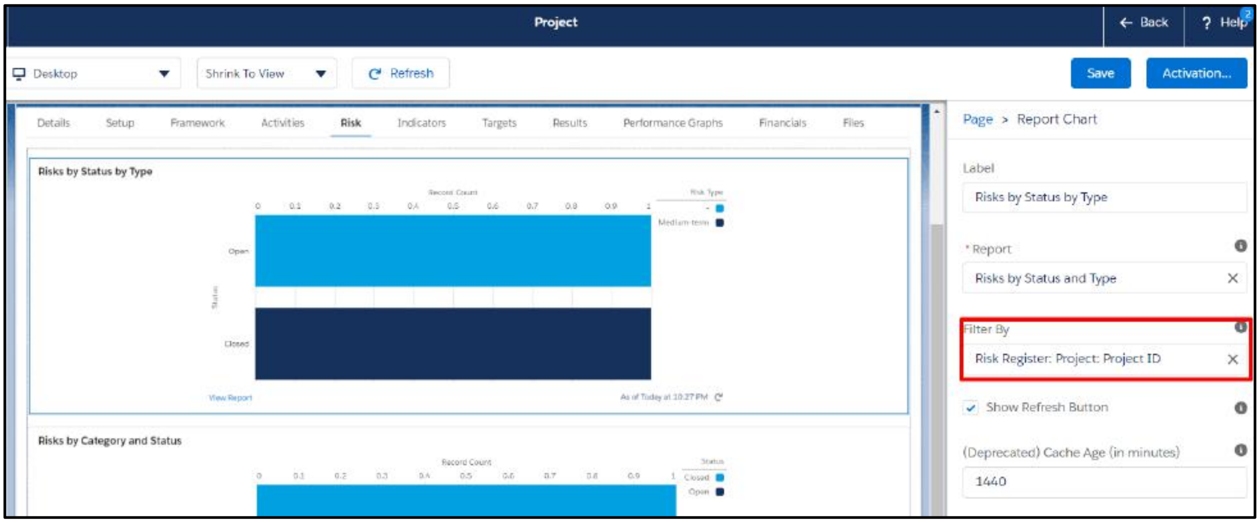


Filter the Risk Report Chart for the Current Project record

ⓘ **Admin Note:**
Due to a Salesforce limitation, Report Charts are not filtered to the current Project record out of the box. The system administrator needs to configure the filter for each report to show only risks associated with the current project.

To configure the filters in report charts, follow the steps below:

1. Navigate to the current project record
2. Click on the Risk tab
3. Click on “Edit Page” option in Setup
4. Click on the Report Chart component in the Lightning App Builder
5. Click on the “Filter By” to specify the current project record



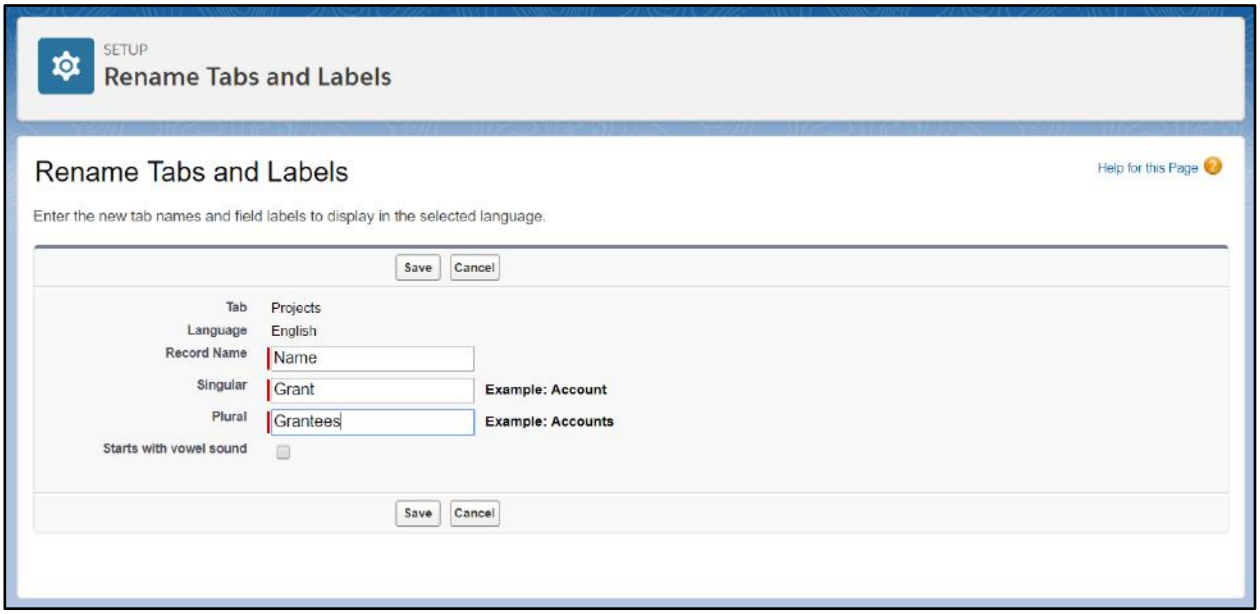
Customizing Terminology and Labels

An organization may choose to customize Amp Impact to match the specific terminology users are familiar with. See the *User Guide* for a glossary and definitions.

Modify this terminology following the steps below:

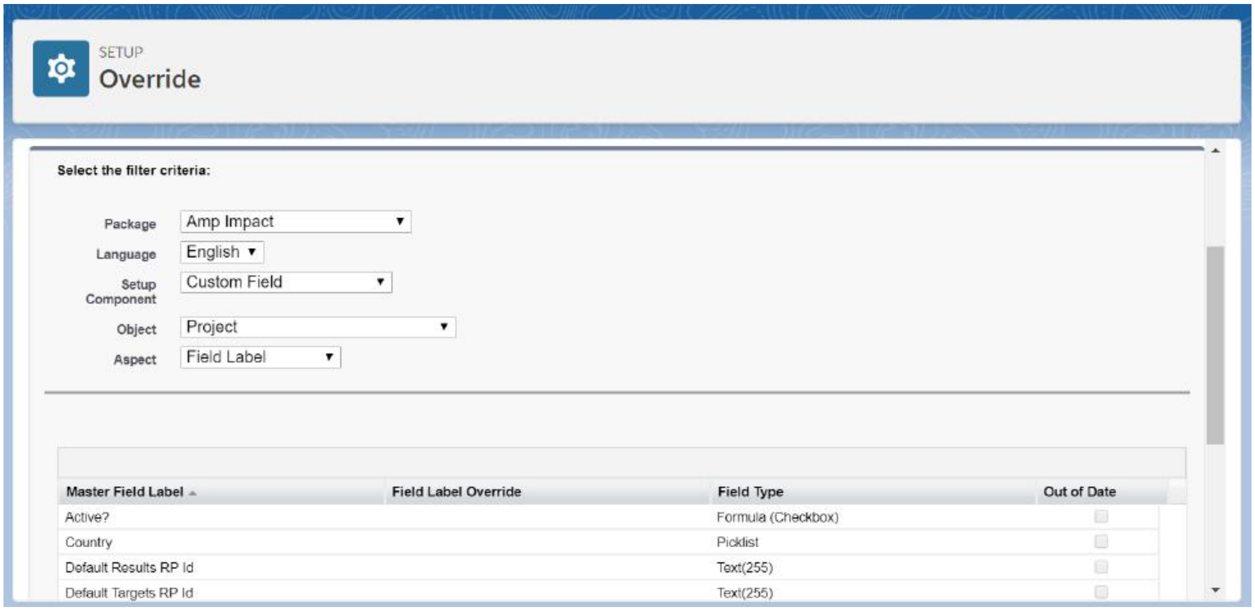
Translate Tabs

- Navigate to Setup > Rename Tabs and Labels.
- Click *Edit* next to the relevant object name (e.g., Project).
- Enter the new tab names (singular and plural) to update the translation / terminology (e.g., Project → Investee).
- Click *Next*.
- Review updates and click *Save*.



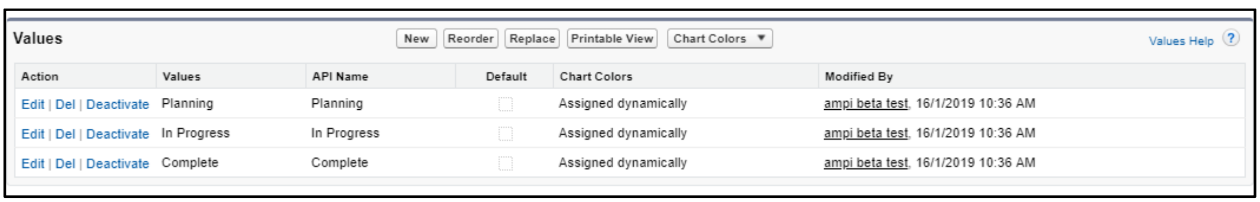
Translate Field Labels

- Navigate to Setup > Translation Workbench > Translation Settings.
  - Select *Enable*.
  - Click "Add" under "Supported Languages" and select "English".
- Navigate to Setup > Translation Workbench > Override.
- Select "Amp Impact" Package and "English" Language.
- Select the Components to translate (Custom Field) and then the relevant object(s).
- Choose the Aspect "Field Label" to update field labels and "Related List Label" to update the labels displayed on related lists on a record detail page.
- Edit the Field Label Override to update the translation/ terminology.
- Click *Save*.



Customize/Translate Picklist Values

- Navigate to Setup > Object Manager.
- Click on the object with the relevant picklist field (e.g., Activity).
- Click on the Field & Relationships tab.
- Click on the name of the picklist field (e.g., Status).
- Customize the picklist values.
    - To update a picklist value, click *Edit* next to the value.
    - To create a new picklist value, click *New* at the top of the list of picklist values and fill in the fields accordingly.



ⓘ **Admin Note:**
While most Amp Impact picklists are unrestricted and can be modified, certain picklists have either restrictions or limitations. These are listed in the table below.

Object API Name	Field API Name	Restrictions/Limitations
Activity__c	Status__c	To update picklist values, both Label and API Name must be modified with the same value. There are no restrictions on creating new picklist values.
	Type__c	To update picklist values, both Label and API Name must be modified with the same value. There are no restrictions on creating new picklist values.
Geographical_Area__c	Type__c	There are no restrictions on editing or creating picklist values, but the changes made to this picklist field must also be made to Geographical_Disaggregation__c on Indicator__c and Project_Indicator__c.
Indicator__c	Data_Type__c	To update picklist values, both Label and API Name must be modified with the same value. The corresponding custom label (listed below) for the picklist value must also be translated: ● INDICATOR_CURRENCY_DATA_TYPE ● INDICATOR_MILESTONE_DATA_TYPE ● INDICATOR_NUMBER_DATA_TYPE ● INDICATOR_PERCENT_DATA_TYPE ● INDICATOR_QUALITATIVE_DATA_TYPE There are no restrictions on creating new picklist values, but additional picklist values will not display on SetTargets or AddResults.
Indicator__c / Project_Indicator__c[3]	Calculate_Total__c	This picklist is restricted. The default picklist value labels can be updated, as long as the API name is not modified. Additional picklist values will not yield any calculations on SetTargets or AddResults.

[3] Any changes made to a picklist on the Indicator__c object should also be made to the corresponding picklist on the Project_Indicator__c object, and vice versa (e.g. if a new picklist value "Bimonthly" is added to Reporting_Frequency__c on Project_Indicator__c, then "Bimonthly" must be also added to the Reporting_Frequency__c field on Indicator__c).

	Aim__c	This picklist is restricted. The default picklist value labels can be updated, as long as the API name is not modified.
	Reporting_ Frequency__c	There are no restrictions on editing or creating picklist values, but the changes made to this picklist field must also be made to Report_Type__c on Reporting_Period__c.
	Target_Frequency__c	There are no restrictions on editing or creating picklist values, but the changes made to this picklist field must also be made to Report_Type__c on Reporting_Period__c.
	Geographical_ Disaggregation__c	There are no restrictions on editing or creating picklist values, but the changes made to this picklist field must also be made to Type__c on Geographical_Area__c.
Project__c	MI_Indicator_Order__c	There are no restrictions on editing or creating picklist values (via the Indicator_Type global value set to accommodate custom fields), but additional picklist values must be formatted such that: ● Label = Custom field label ● Value = Custom field API Name
	MI_Project_Indicator_ Order__c	There are no restrictions on editing or creating picklist values (via the Indicator_Type global value set to accommodate custom fields), but additional picklist values must be formatted such that: ● Label = Custom field label ● Value = Custom field API Name
	STAR_Project_Indicat or_Order__c	There are no restrictions on editing or creating picklist values (via the Indicator_Type global value set to accommodate custom fields), but additional picklist values must be formatted such that: ● Label = Custom field label ● Value = Custom field API Name
Project_Indicator_ Reporting_Period__c	Data_Tracked__c	This picklist is restricted. The default picklist value labels can be updated, as long as the API name is not modified. Additional picklist values will not display on SetTargets or AddResults.

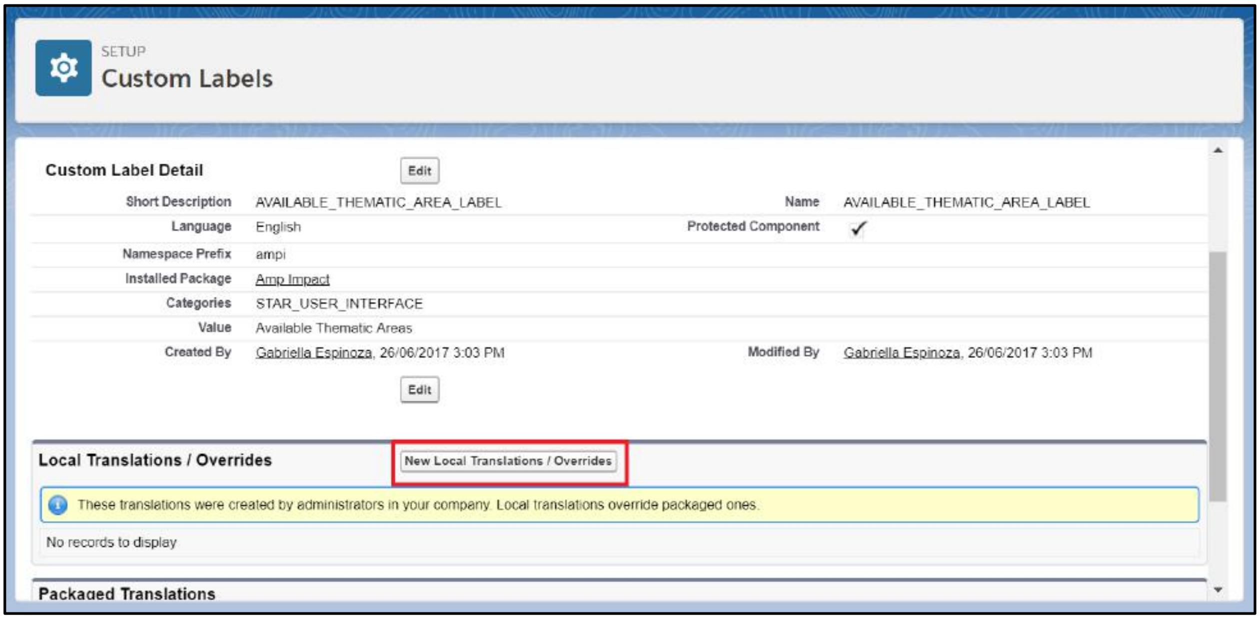
Reporting_Period__c	Report_Type__c	There are no restrictions on editing or creating picklist values, but the changes made to this picklist field must also be made to Reporting_Frequency__c and Target_Frequency__c on Indicator__c and Project_Indicator__c.
Result__c	Data_Tracked__c	This picklist is restricted. The default picklist value labels can be updated, as long as the API name is not modified. Additional picklist values will not display on SetTargets or AddResults

ⓘ **Admin Note:**
For details on picklists related to the IATI reporting functionality, please refer to the IATI Setup Guide.

Translate Custom Labels in VisualForce Pages and Lightning Components

Select custom labels are referenced in Visualforce Pages and Lightning Components as output text. To update this text, you need to also update corresponding custom labels. To do so:

1. Navigate to Setup > Custom Labels.
2. Locate the relevant custom label.
    a. The Categories column indicates:
        i. Which Visualforce page or Lightning Component references the custom label.
        ii. Which item(s) - e.g. button, tooltip, pop-up header - display the custom label text.
3. Click the relevant custom label (e.g., AVAILABLE_THEMATIC_AREA_LABEL) to view the label's details.
4. Then add a new translation by clicking "New Local Translations / Overrides".



5. Select the Language as "English" and fill in Translation Text with the appropriate translation / terminology (e.g., "Available Focus Areas" to replace "Available Thematic Areas").
6. Click *Save*.

When a user downloads an Excel template from Set Targets or Add Results, they are given a set of instructions on how to properly set up the Excel sheet for upload. For any additional custom instructions that may be needed for your organization, use these custom labels to add further steps to the sections of the instructions sheet:

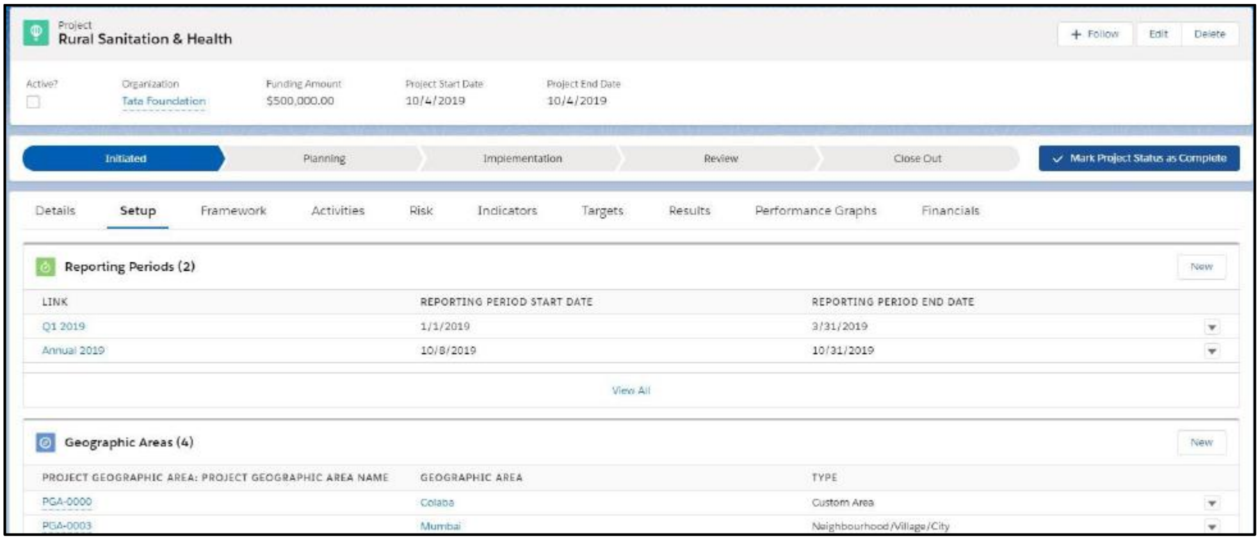
a. UNDERSTANDING_THE_DOWNLOADED_EXCEL_CUSTOM
b. PREPARE_EXCEL_FOR_UPLOAD_CUSTOM
c. UPLOAD_EXCEL_INSTRUCTIONS_CUSTOM

Set Up Project Page

Amp Impact provides two interfaces for project records, depending on whether a user is in Salesforce's Classic or Lightning Experience.

Customize the Project record page in Lightning

> ⓘ **Admin Note:**
> This step is optional for setting up the Project record page, but if your organization wants to remove a tab or change the default layout, it can be customized as needed.



Projects in Lightning Experience are displayed with each of the Lightning Components or Visualforce pages included as a tab, and users can toggle between each page without leaving the project's record detail page.

- There are two available action buttons: Edit & Delete.
- The Path above the record's tabs is linked to the Project Status field. Update the field by using the Path component or by editing it directly within the Project record.
- By default, the tabs on the Project Lightning Record Page include: Details, Setup (Related Lists), Framework, Activities, Risk, Indicators, Targets, Results, Performance Graphs, and Financials.
    - To add or remove any of these tabs, clone the Lightning Record Page and, in the cloned page, edit the tabs and tab order by clicking on the Tab Component.[4]

---

[4] When adding a new tab, be sure to place a Lightning Component within the tab in order for the tab to save and display.

- If your organization needs to change Project's record layout in Lightning because only certain pages are utilized by their users, create a new Lightning Record Page with the desired setup through the Lightning App Builder. To add any of the Visualforce pages to a Lightning Page:
    - Drag the Visualforce Lightning Component onto the page.
    - Click into the component.
    - Use the picklist on the right side to select which Amp Visualforce page to display in the component's space.

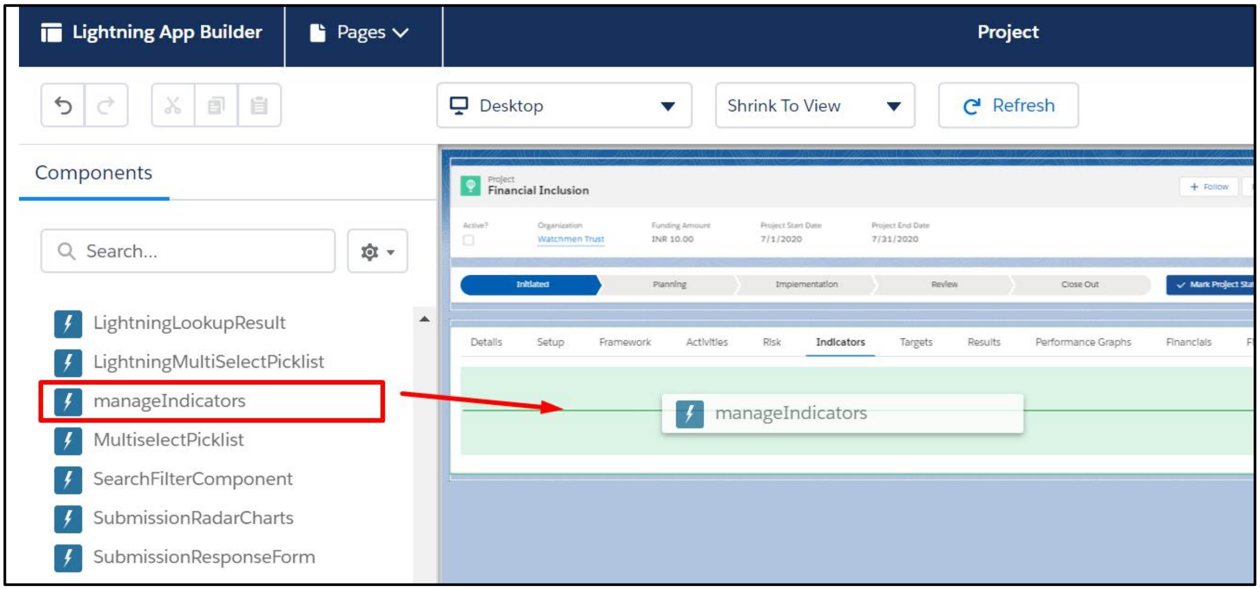
- If your organization needs to change the Project's page layout in Lightning because only certain fields are utilized by users, edit those items directly in the page layout editor in Setup.
    - Control access to fields on the Project record layout by adding/removing those fields.

Add manageIndicators Lightning Web Component to the Project Lightning Page

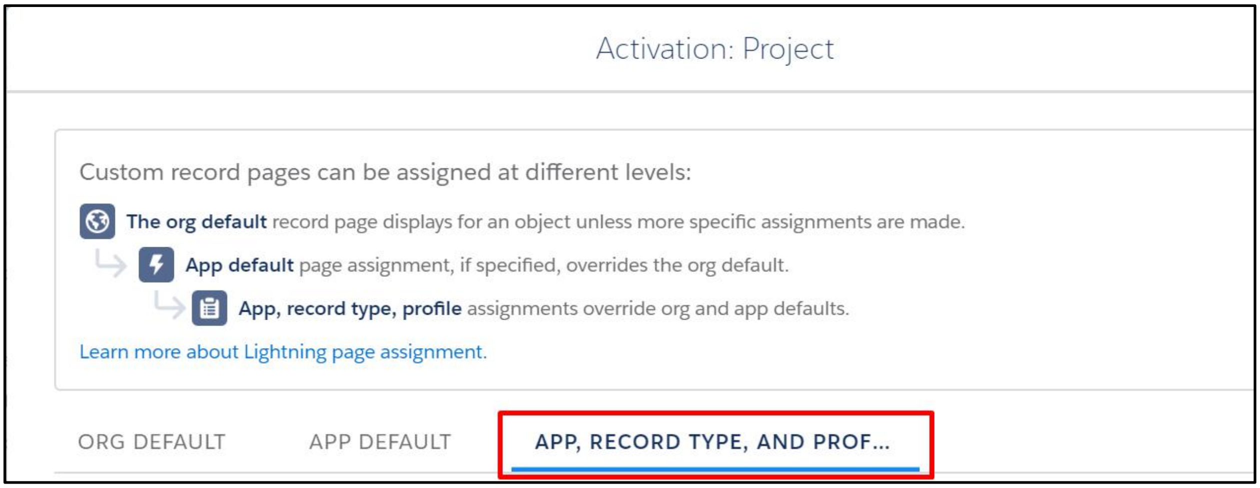
To preserve existing functionality on the Project Lightning Record Page, the new manageIndicators Lightning Web Component has not been immediately added to the page. If your organization wishes to switch to this new interface (see the Visualforce and Lightning Web Component Differences section in the Amp Impact User Guide to learn more), follow the below steps:

ⓘ **Admin Note:**
These steps assume that the packaged Project Lightning Record Page is being used. If a custom page has already been created, edit that Lightning Record Page directly.

1. Create a clone of the Project Lightning Record Page.
2. In Lightning App Builder, click on the "Indicators" tab to open up the Tab component editor on the right-hand pane.
3. Remove the Visualforce component from the "Indicators" tab.
4. On the left-hand pane, scroll down to Custom - Managed Components.
5. Drag manageIndicators from the pane and drop it into the "Indicators" tab.



6. Click “Save”.
7. Click “Activation”.
8. Click on the “App, Record Type, and Profile” tab.



9. Assign the Lightning page to Amp Impact.
10. Click Next.
11. Assign the record type to Master (or whatever record type will require indicator management).

ⓘ **Admin Note:**
The manageIndicators Lightning Web Component currently does not support Aggregated or Calculated Indicators. If either feature is currently used by your organization, then it is recommended to continue using the Visualforce page until the Lightning Web Component also supports that functionality.

Set Up Manage Indicators Page

Set up Calculated and Aggregated Indicators

The following steps are required if users are using the Manage Indicators feature with Aggregated or Calculated Project Indicators.

Enable Streaming API in the Salesforce Org (Required)

ⓘ **Admin Note:**
If Streaming API has already been enabled while installing Amp Impact, this step should be skipped.

Some features of Aggregated and Calculated Indicators will only function correctly if Streaming API is enabled in your Salesforce org. To enable Streaming API, follow the below steps:

1. Open Setup.
2. Use the Quick Find search to find and open User Interface.
3. Scroll to the Setup section of User Interface.
4. Make sure that 'Enable Streaming API' is selected.
5. Click *Save*.

Relevant Fields Available in the Field Sets

1. Indicator__c object
    a. Add New Indicator Popup on ManageIndicators page:
        i. Type_of_Results__c (this is a required field)
2. Project_Indicator__c object
    a. Edit Project Indicator Popup on ManageIndicators page:
        i. Type_of_Results__c
    b. Selected Project Indicators table on ManageIndicators page:
        i. Type_of_Results__c
        ii. Last_Aggregation_Date__c

iii. Last_Calculation_Date__c
iv. Calculation_Formula__c

c. Add Results Info Popover on AddResults page:
   i. Type_of_Results__c
   ii. Last_Aggregation_Date__c
   iii. Last_Calculation_Date__c
   iv. Calculation_Formula__c

Schedule the Aggregation and Calculation Batches

A System Admin can use the Apex Scheduler to set a frequency for the batch(es) to run:

1. From Setup, enter Apex in the Quick Find box, then select Apex Classes.
2. Click Schedule Apex.
3. Enter a unique value in the job name (e.g. "Run Agg Batch Daily Overnight" to run the Aggregation batch every day while people are offline).
4. Click the lookup button next to Apex Class and click the name of your scheduled class (either AggregateCalculation_Scheduler or AutoCalculation_Scheduler).
5. Select Weekly or Monthly for the frequency and set the frequency desired.
6. Select the start and end dates, and a preferred start time.
7. Click *Save*.

ⓘ **Admin Note:**
It is recommended to schedule the batches overnight or outside of work hours, as the batches can take several hours to run, depending on the amount of data processed and/or generated in your system.

Calculated indicators that are run in batch en masse do not update in any particular order, so if a calculated indicator refers to another calculated indicator, the data might update incorrectly as each calculated indicator may update results out of order.

There are two workarounds for this limitation:
1. Run the batch en masse as many times as the level of hierarchy in calculated indicators (e.g. run it twice if there's a single level of hierarchy). Data will be accurate after the last run of the batch.
2. Run the batch individually for calculated indicators based on the hierarchy established by the formula. For example, a Project has Calculated Indicator A "% of beneficiaries with average income above 2000". Calculated Indicator B "% of beneficiaries with average income below 2000" calculates the result by subtracting indicator A from 100. In this case, calculated indicator A should be calculated first, and subsequently calculated indicator B.

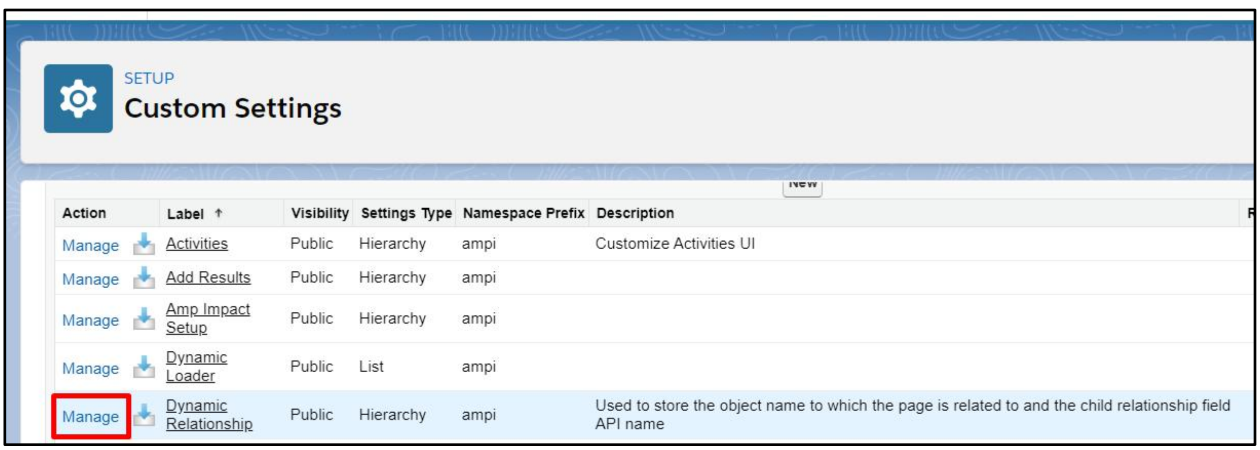
Customize Dynamic Relationships and Validation Rules for Indicators

Define Indicators on Standard and Custom Objects - Optional

Organizations may choose to define Indicators on standard or custom objects for flexible progress tracking. For example, a grants officer may wish to create a relationship between Project and Account so that they can track progress of a specific organization.

This can be accomplished in Amp Impact by first creating a custom lookup relationship from the Project to the standard or custom object, then creating a Dynamic Relationship record through custom settings. Note that this is a one-to-one relationship where only one parent record, for example Account, can be associated per Project record.

1. Open Setup.
2. Navigate to the Object Manager.
3. Select Project.
4. Click Fields & Relationships.
5. Click “New”.
6. In Step 1, select Lookup field type.
7. In Step 2, select a standard or custom object.
8. Fill out the required fields to Save the new field.
9. Use the Quick Find search to find and open Custom Settings.
10. Locate the “Dynamic Relationship” Custom Setting, and click Manage.

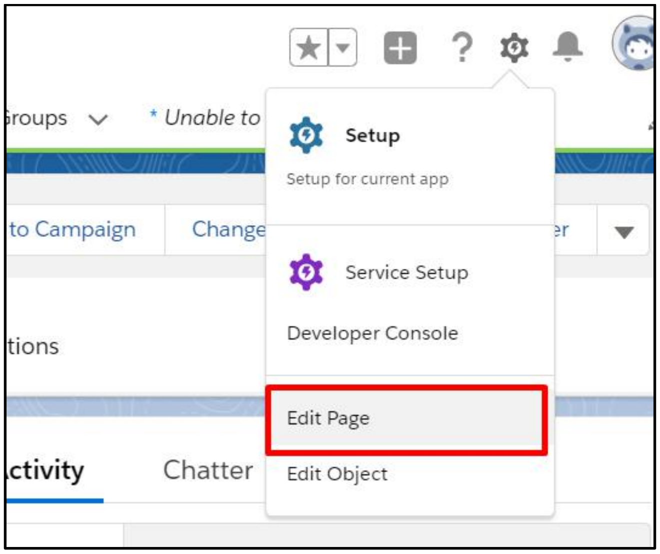


11. Click “New”.
12. Fill out the fields as follows:
    a. Object_Name__c = Name of the Parent Object that the Project__c will be associated with
        i. example: *Account*
    b. Relationship__c = Name of the Reference Field on the Project__c object

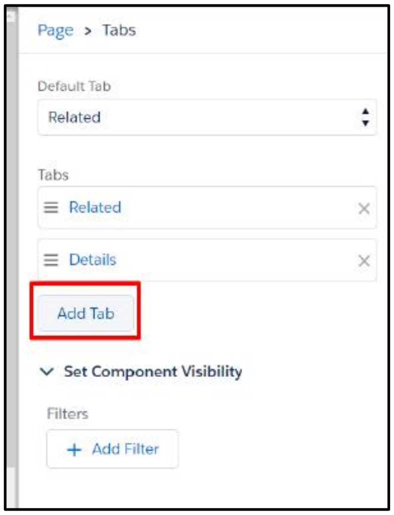
i. example: *Organization__c*

13. Click Save.
14. Navigate to a specific record of the standard or custom object that has the new relationship to the Project.
15. Ensure the Lookup to the standard or custom object on the Project record is filled out with a specific record.
16. On the record detail page, click on Setup.

17. Click "Edit Page" to open up Lightning App Builder.

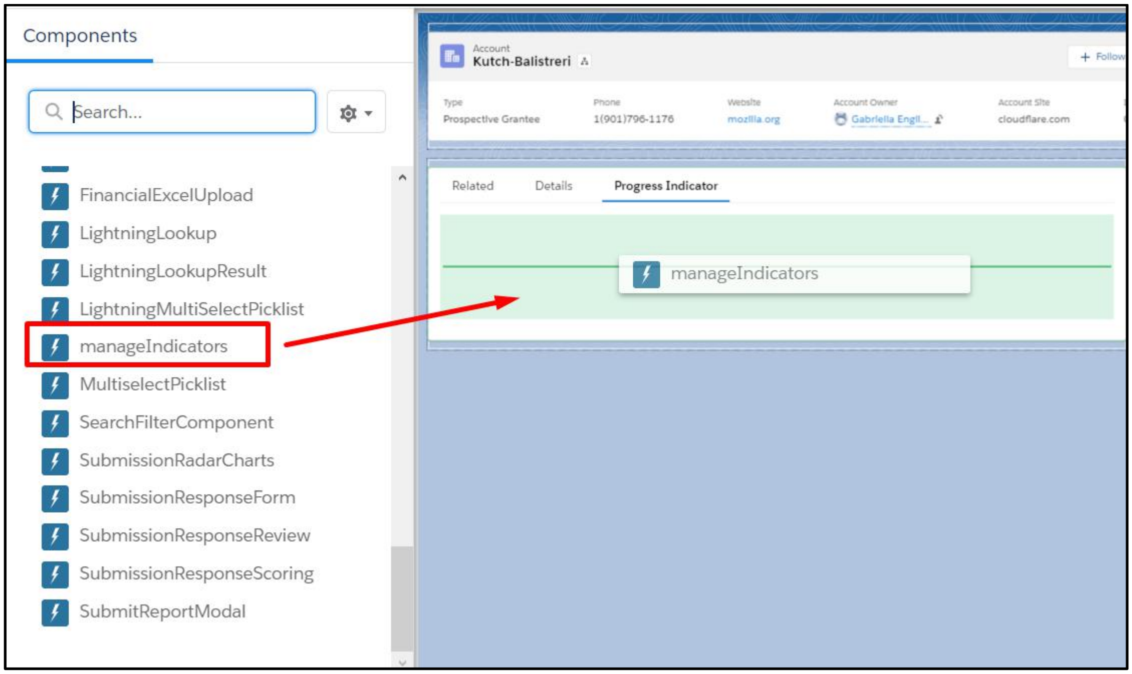


18. *Optional* - In Lightning App Builder, click on the "Detail" tab to open up the Tab component editor on the right-hand pane.
    a. Click "Add Tab".



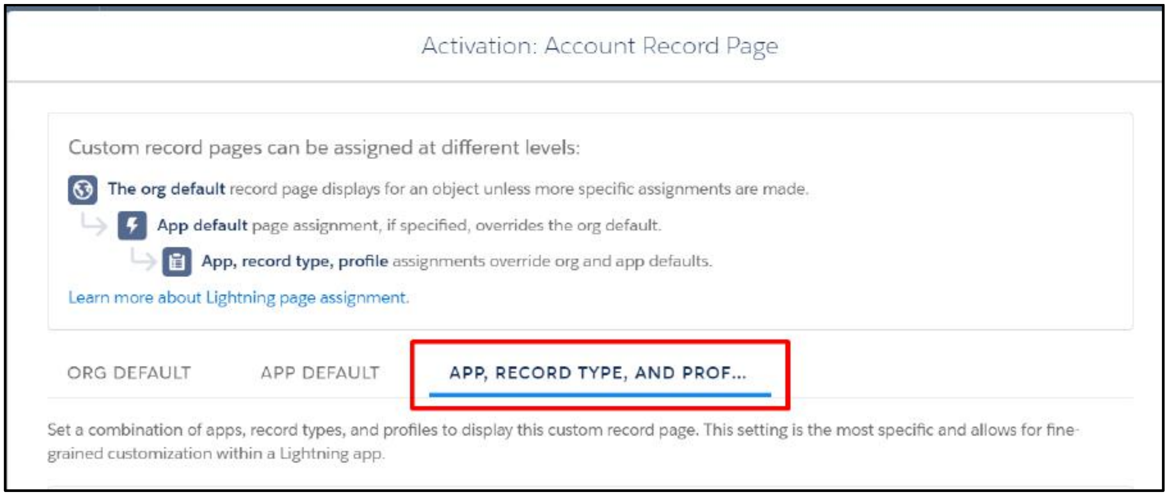
b. Select a Label or input a custom text Label.
c. Click “Save.”

19. On the left-hand pane, scroll down to Custom - Managed Components.
20. Drag manageIndicators from the pane and drop it into the newly created tab or where ever desired on the Lightning page.



21. Click “Save”.

22. Click “Activation”.
23. Click on the “App, Record Type, and Profile” tab.



24. Assign the Lightning page to Amp Impact.
25. Click Next.
26. Assign the record type to Master.
27. Click Next.
28. Assign the Lightning page to relevant profiles.
29. Click Next.
30. Review Assignments, and click “Save”.

Define Validation Rules for Project Indicators - Optional

To notify users if they are setting up project indicators incorrectly as per their organization's reporting standards, a custom validation rule may be configured. For more information, refer to Salesforce documentation on defining validation rules.

For example, to ensure users are entering threshold values that fall within a specified range for fields ampi__Red_Yellow_Threshold__c and ampi__Yellow_Green_Threshold__c, a validation rule with the appropriate Error Condition Formula may be applied every time an Project Indicator record is created.

Set Up Submissions

ⓘ **Admin Note:**
The Submissions feature consists of six Lightning Components. In order to be able to use Submissions in Amp, your Salesforce instance will need to be in Lightning Experience, and MyDomain will need to be set up in your Salesforce org. For more details, please see Salesforce's documentation on how to set up MyDomain.

Field Sets: Customize Pop-ups to Create/Edit Sections and Questions in Submissions

ⓘ **Admin Note:**
This step is optional when using the Submissions feature. However, if an organization wants to add/remove fields from Create/Edit popups, then the following setup steps must be followed.

ampi__Section__c and ampi__Question__c are two Amp objects that are used to customize Submission templates, fill out Submission responses, and score responses. Each object has a field set that controls the display of the respective pop-ups to add or edit records.

- Add/Edit Section Popup: Field set on Section object that determines which fields are displayed and required in the Add New Section and Edit Section pop-ups.
- Add/Edit Question Popup: Field set on Question object that determines which fields are displayed and required in the Add New Question and Edit Question pop-ups.

Assign Record Types on Profiles (Required)

ampi__Submission__c and ampi__Question__c each have two Record Types. Since the Amp package does not contain any Profiles, those Record Types need to manually be assigned to each Profile that needs access to the Submission feature.

- ampi__Submission__c Record Types
    - Template: Assign this record type to any Profile that needs to create or view submission templates.
    - Submission: Assign this record type to any Profile that needs to assign a submission to another user from a template, fill out a submission response, or review a submission response.

- ampi__Question__c Record Types
    - Question: Assign this record type to any Profile that needs to create or view questions on a submission template.
    - Answer: Assign this record type to any Profile that needs to create a submission from a template, fill out answers in a submission response, or review answers in a submission response.

Assign Permission Sets to Users

Amp Impact provides three permission sets that should be assigned to users depending on how they will be using the Submissions feature. The following table details each permission set and example users. For any custom permissions that need to be provided, clone the relevant permission set to customize the permission sets.

Permission Set	Description	Example User
Submission Template	Enables Users to access the fields necessary for creating Templates, creating Submissions from those Templates, and assigning new Submissions to parent records.	Program Officer

Submission Response	Enables Users to access the fields necessary to view their Submissions, fill out their answers to the Questions, and submit their response for review.	Grantee
Submission Review	Enables Users to access the fields necessary to view and edit Submissions assigned to them for review, assign scores to the response, and submit their scores for approval.	Assessment Reviewer

Follow these steps to ensure your Submissions Users can fully use the feature.

1. Go to the Setup Quick Search box, and enter “Permission Sets”.
2. Open the permission set that you would like to assign to Users. This opens the permission set detail page.
3. Click the “Manage Assignments” button in the top menu of the permission set detail page. This will load an assignment interface.
4. In the next page, click the “Add Assignments” button in the top menu. This will load a list of all Users in the org.
5. Select the checkbox next to each User to whom you want to assign the permission set. Once all relevant Users are selected, click the “Assign” button.
6. Click Done.

Customize Submission Objects, Lightning Pages, and Components

The Submission feature involves three objects, three Lightning pages (on the ampi__Submission__c object), and seven Lightning Components, all of which can be configured to meet your specific use case. Review the following table to understand each Lightning Component, its functionality, and example users that might be interacting with the component to create custom interfaces for Users to utilize Submissions.

Component Name	**Function**	**Implementation**	**Example User**
CreateTemplateData	Create and edit submission templates with sections and questions	Added to Lightning Page for Submission Templates	Program Officer
SubmissionTemplatePreview	Preview template to see how it will look to responding users	Added as Action to Submission Template	Program Officer

		page layout	
SubmissionResponseForm	Respond to questions on a template assigned to a user	Added to Lightning Page for Submission Responses	Grantee
SubmissionResponseReview	Review and edit a user's submission *Note*: If a user has read-only access on any fields on the ampi__Question__c object, then those fields will be displayed as read-only in the component.	Added to Lightning Page for Submission Review	Assessment Reviewer
SubmissionResponseScoring	Assign scores and add comments to a user's submission	Added to Lightning Page for Submission Review	Assessment Reviewer
SubmissionRadar Charts	View scores for all submissions on a single parent record (e.g. the scores from all Financial Reports submitted by an Organization/Account)	Not added anywhere by default - needs to be added to a custom Lightning page	Program Officer
SubmissionClone	Clone a submission (including responses if Record Type is Submission) so that the user can simply edit pre-existing responses for their next submission	Added as Action button to Submission Template Layout and Submission Layout	Grantee, Program Officer

The SubmissionResponseForm and SubmissionResponseScoring components can be further customised for different profiles and their requirements by using the following design attributes:

Design Attributes	**Function**
viewOnly	Lock the input fields for assigned profiles so that only intended users (of a certain profile) are able to fill out a submission
canHideDownload Button	Hide the Download button for assigned profiles so

	that only intended users (of a certain profile) are able to download a submission
canHideSubmit Button	Hide the Submit button for assigned profiles so that only intended users (of a certain profile) are able to submit

To make the Submissions feature easier to use, now the SubmissionResponseForm can now be used on the record page of the parent object to which the Submission object looks up to.

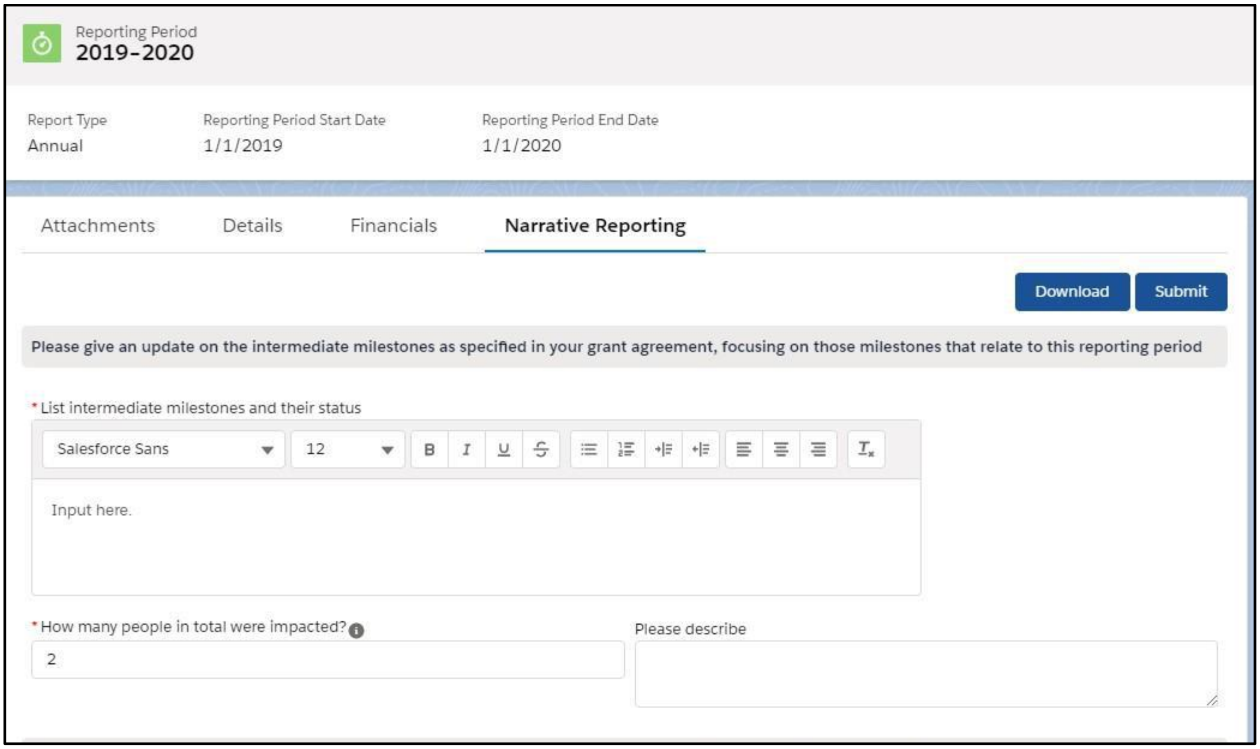


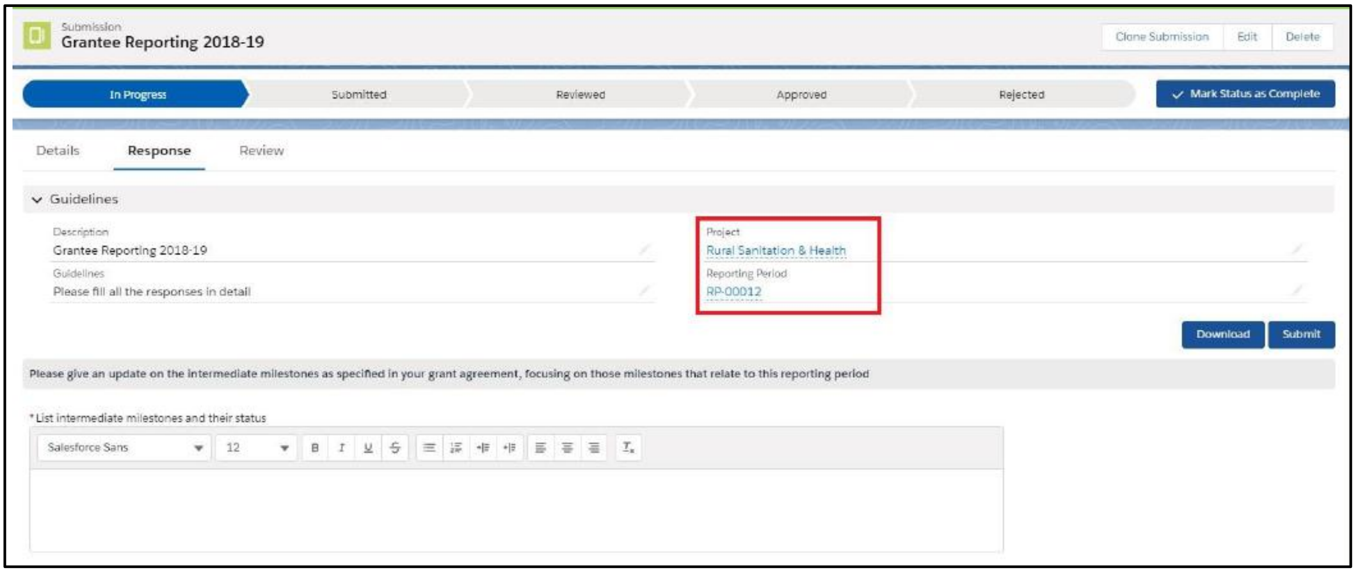
Image: Place the SubmissionResponseForm component directly on Reporting Period record pages to enable grantees to complete a narrative report on the Reporting Period record itself.

Create a custom relationship between Submission and another object (Required)

Out of the box, the Submission object is not associated with any specific Salesforce object, besides Section and Question. Since the feature can be used to assess or qualitatively report on any Salesforce object, the System Admin will need to custom configure that relationship depending on the organization's use case.

Add a lookup field on the Submission object to start creating Submission records for another object record. You can choose to add a lookup to Standard Salesforce objects, Amp Impact objects, or any custom object in your Salesforce system.

Once the lookup field is created, be sure to add it to the page layout (*only* the Submission Layout and Response Layout) that will be displayed to Users creating Submission records to be filled out by other Users.



Create a Submission Relationship custom setting record

Once Submission is related to another object, a custom setting record will need to be created in order to correctly display either the Submission Response Form or Radar Charts on the parent object record pages. The purpose of the custom setting is for the component to store this metadata for the component to query (i.e. a custom setting record would need to be created for every relationship field that is added on Submission if the Submission Response Form Radar Charts are being used on each parent object).

1. Go to Custom Settings in Setup.
2. Click "Manage" next to Submission Relationship.
3. Click the "New" button.
4. Fill out the *Name* field with the API name of the parent object.
    a. e.g. If Submission is child to the Project object from Amp, *Name* would be populated with "ampi__Project__c".
5. Fill out the *Child Relationship Field Name* field with the API name of the relationship field created earlier.

a. e.g. If Submission is child to the Project object, *Child Relationship Field Name* would be populated with “Project__c”, the API name of the custom field added to the Submission object.

In the example below, Submission is looking up to Projects (Object API Name: ampi__Project__c) through a custom lookup field on Submission (Field API Name: Project__c).

ⓘ **Admin Note:**
If the organization’s use case will involve creating Submissions for multiple objects, then Steps 2 and 3 will need to be repeated for each object that will require the Submissions feature.

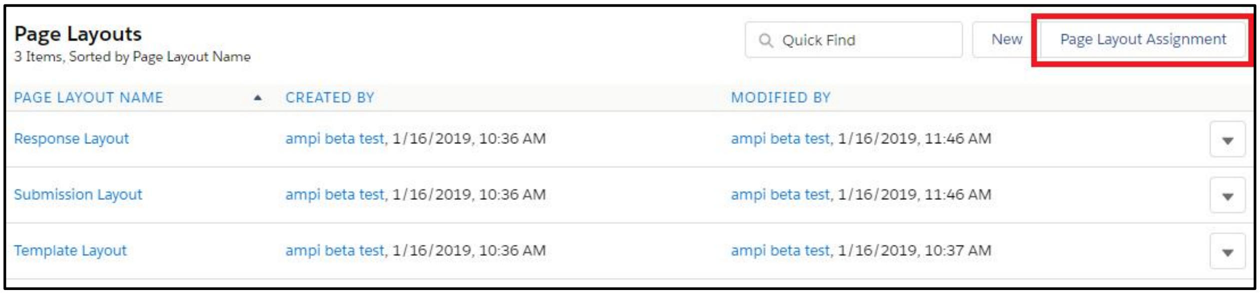
For example, an organization may conduct assessments on Organizations/Accounts and request narrative reporting for Projects. The System Admin will need to add one lookup field and one custom setting record for Account, and repeat the process for the Project object.

Assign the Submission page layouts to specific profiles & record types

Out of the box, the Submission object comes with three page layouts:

- Template Layout - this should be assigned to the Template Record Type and the Profile of users who will be creating, editing, and downloading submission templates (e.g. Program Officers).
- Response Layout - this should be assigned to the Submission Record Type and the Profile of users who will be filling out responses in submissions (e.g. Grantee).
- Submission Layout - this should be assigned to the Submission Record Type and the Profile of users who need to see the full details of the submission record (e.g. Program Officer, Assessment Reviewer).

On the Submission object, scroll to the Page Layouts and click the *Page Layout Assignment* button to customize which page layout is displayed to which user profile and record type.

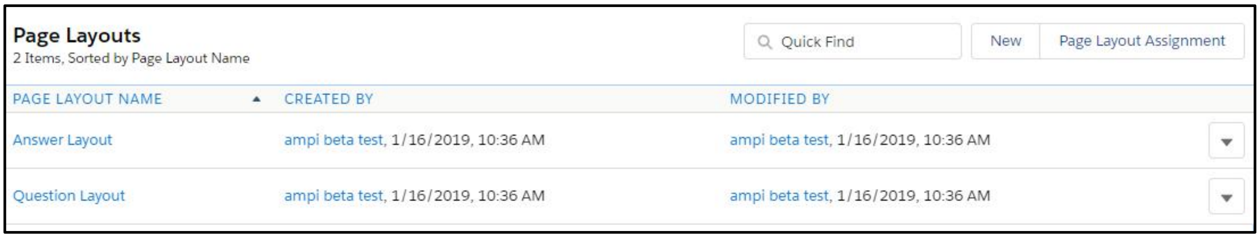


Assign the Question page layouts to specific profiles & record types

Out of the box, the Question object comes with two page layouts:

- Question Layout - this should be assigned to the Question Record Type and the Profile of users who will be creating, editing, and downloading submission templates (e.g. Program Officers).
- Answer Layout - this should be assigned to the Answer Record Type and the Profile of users who will be responding to questions in submissions (e.g. Grantees).

On the Question object, scroll to the Page Layouts and click the *Page Layout Assignment* button to customize which page layout is displayed to which user profile and record type.



Assign the Lightning pages to specific profiles

Lightning Page API Name	Function	Components	Related Record Type	Example User
Submission_Template_Record_Page	Enables users to create and edit submission templates, preview templates and assign those templates to other users to fill out	CreateTemplateData SubmissionTemplatePreview SubmissionClone	Template	Program Officer
Submission_Response_Record_Page	Enables users to fill out any submissions that have been assigned to them and submit	SubmissionResponseForm SubmissionClone	Submission	Grantee

	responses for review			
Submission_Review_Record_Page	Enables users to read responses submitted by other users and assign scores to those responses	SubmissionResponseReview SubmissionResponseScoring	Submission	Assessment Reviewer

None of the Lightning pages have pre-configured user assignments. Provide user access to the three pages directly through the activation settings on the pages themselves, based on how Users will be working with Submissions. For example, a System Administrator, who will see both Templates and Submission Reviews, can be assigned both the Submission Template and Submission Review Record Pages by using Record Type assignment.

Additionally, by default, the three Lightning pages are configured based on the three main functions of the Submission feature: Template creation, Submission response, and Submission review. These Lightning pages can be further configured to address an organization's specific use case by cloning the pages and making the necessary changes.

Set up Radar Charts to display Submission scores

ⓘ **Admin Note:**
Scoring a Submission and viewing a radar chart with performance is optional when using the Submissions feature. However, if an organization wants to use radar charts, then the following setup steps are required.

Add the Radar Chart component to Lightning and Community pages

Since the parent object of Submission needs to be custom configured for each organization, the radar chart component (SubmissionsRadarChart) is not included on any Lightning page out of the box. To display the component, simply open the Lightning record page of Submission's parent object in the Lightning App Builder and/or Community Builder and drag the Radar Chart component into the desired space on the page. As needed, add visibility filters to the component to only display the component when certain criteria are met.

ⓘ **Admin Note:**

The radar chart component only displays on a Lightning page if the related submission template has child submissions with scored sections. If the submission template has no sections or the sections are not scored, **then the component will display as blank.**

Set up automation for users to view Submissions components outside of the Submission record page

ⓘ **Admin Note:**
Using Submission components in Flow is optional when using the Submissions feature, and depends on the organization's needs and use cases.

The following components are available for Flow so that they can be launched from pages besides the Submission record page:

- SubmissionResponseForm
- SubmissionResponseReview
- SubmissionResponseScoring

Depending on the organization's use case, set up a Flow, using the Screen Flow element, to display the relevant component in other locations in the system - e.g. the Lightning Home Page of an app or the record page of a related object.

ⓘ **Admin Note:**
If a Flow has been set up using the SubmissionResponseForm component, it is also recommended to modify the SUBMISSION_SUBMIT_MODAL_TEXT custom label to guide the user through the Flow.

Set up automation to assign scores to Sections and Submissions

Scores on Sections (ampi__Section__c.ampi__Score__c) and Submissions (ampi__Submission__c.ampi__Overall_Score__c) can be populated either manually or through automation, based on the score values assigned to child records.

Organizations may choose to build additional automation (e.g. section scores should take the average of the question response scores) for assigning scores, using native Salesforce automation, according to their specific requirements.

Set up automation to lock Responses and/or Reviews

The SubmissionResponseForm and SubmissionResponseScoring components are displayed as either editable or read-only, depending on the value in two fields on the Submission object.

1. If *ampi__Response_Locked__c* = TRUE, then the SubmissionResponseForm component is locked from editing for all Users on that Submission record.
2. If *ampi__Review_Locked__c* = TRUE, then the SubmissionResponseScoring component is locked from editing for all Users on that Submission record.
3. If *ampi__Response_Status__c* = “Submitted” then the SubmissionResponseForm component is locked from editing for all Users on that Submission record.
4. If *ampi__Review_Status__c* = “Submitted” then the SubmissionResponseScoring component is locked from editing for all Users on that Submission record.
5. By default, these fields are updated manually. If the components should lock after specific user actions, automation can be built to auto-populate these fields based on those user actions. For example, if the SubmissionResponseForm component should lock after a user submits their response and the submission review is in progress, then a workflow rule can be built such that when *ampi__Review_Status__c* = “In Progress”, *ampi__Response_Locked__c* updates to TRUE, so the user can no longer edit their answers in the midst of a review.

Record Limits per Feature

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.[5]	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	300 Results (per Reporting Period & Geographic Area combination within a Project)	1-2 mins
AddResults		
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)[6]	<1 min
Aggregated Indicators	390 Aggregated Indicators	8-12 min

[5] (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.

[6] 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	300 Activities per Implementation Plan (Recommended - limit is 6,500)	N/A
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

Customize Automation

ⓘ **Admin Note:**
Customizing Automation is optional, and depends on the organization's needs and use cases.

Customize Process Automation

Process Builder

Amp Impact has the following process builders:

- *Copy Objective Field Values onto Project Objective.* This copies the value in the ampi__Level__c and ampi__Definition__c fields on a ampi__Catalog_Objective__c record respectively onto the ampi__Level__c and ampi__Description__c fields on any child ampi__Objective__c records.
- *Copy Indicator Field values onto Project Indicator*. This copies the value in the following fields on ampi__Indicator__c to the corresponding fields on ampi__Project_Indicator__c:
    - ampi__Active__c
    - ampi__Calculate_Total__c
    - ampi__Cross_Disaggregation_By_Sex__c
    - ampi__Cumulative__c
    - ampi__Data_Source_Language_1__c
    - ampi__Data_Source_Language_2__c
    - ampi__Data_Source_Language_3__c
    - ampi__Data_Source__c
    - ampi__Indicator_Definition_Language_1__c
    - ampi__Indicator_Definition_Language_2__c
    - ampi__Indicator_Definition_Language_3__c
    - ampi__Indicator_Definition__c
    - ampi__Disaggregation_Group_Language_1__c
    - ampi__Disaggregation_Group_Language_2__c
    - ampi__Disaggregation_Group_Language_3__c
    - ampi__Disaggregation_Group__c
    - ampi__Exclude_From_IATI__c
    - ampi__Geographical_Disaggregation__c
    - ampi__Guideline_Language_1__c
    - ampi__Guideline_Language_2__c
    - ampi__Guideline_Language_3__c
    - ampi__Guideline__c
    - ampi__Notes__c
    - ampi__Red_Yellow_Threshold__c
    - ampi__Yellow_Green_Threshold__c
    - ampi__Reporting_Frequency__c
    - ampi__Target_Frequency__c
    - ampi__Targets_Are_Disaggregated__c
    - ampi__Type_Of_Results__c
    - ampi__Units_Language_1__c
    - ampi__Units_Language_2__c
    - ampi__Units_Language_3__c
    - ampi__Units__c
    - ampi__Validation_Range_Maximum__c
    - ampi__Validation_Range_Minimum__c

The process builders have been enabled as a template, and hence if you want to edit it to meet your organization's specific use case, you can clone the process, make the required changes in the cloned process, and activate the cloned process.

Deactivate Automation

> ⓘ **Admin Note:**
> Deactivating Automation is optional, and depends on the organization's needs and use cases.

After installation of Amp Impact, the package contains a number of automations that simplify data management for the users. However, if certain automations are unused or do not match your business processes, they can be deactivated by following the guidelines below.

Deactivate Triggers using Dynamic Loader

On installation of Amp Impact, a post-install script will run and automatically install and activate all Amp Impact triggers as Dynamic Loader custom setting records in the Salesforce org.

Admins can customize (i.e. change the order, deactivate) the triggers by opening and editing each Dynamic Loader custom setting record. As an Admin, you can control which Triggers from the Amp Impact action schema (review this in your Field Map document) you would like to disable. For example, if your organization does not use Thematic Areas, you could choose to deactivate the Triggers on the following objects: ampi__Thematic_Area__c, ampi__Project_Thematic_Area__c, and ampi__Project_Indicator_Thematic_Area__c.

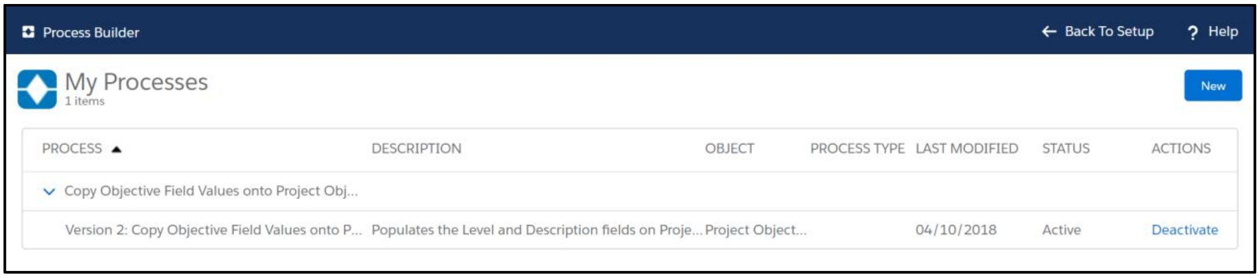
You can also control if your users should be able to download an Excel file from the SetTargets and AddResults pages through the Dynamic Loader custom setting.

Deactivate Process Automation

Beyond Apex triggers, Amp Impact includes additional automation, including processes and workflow rules & actions.

Process Builder

Amp Impact has two process builder templates (*Copy Objective Field Values onto Project Objective* and *Copy Indicator Field values onto Project Indicator*). By default, they are active on installation, and can be deactivated if your organization does not wish to use them. To do so, go to the Setup Quick Search box and search for "Process Builder". Expand the process builder and click "Deactivate" next to the Active Version.

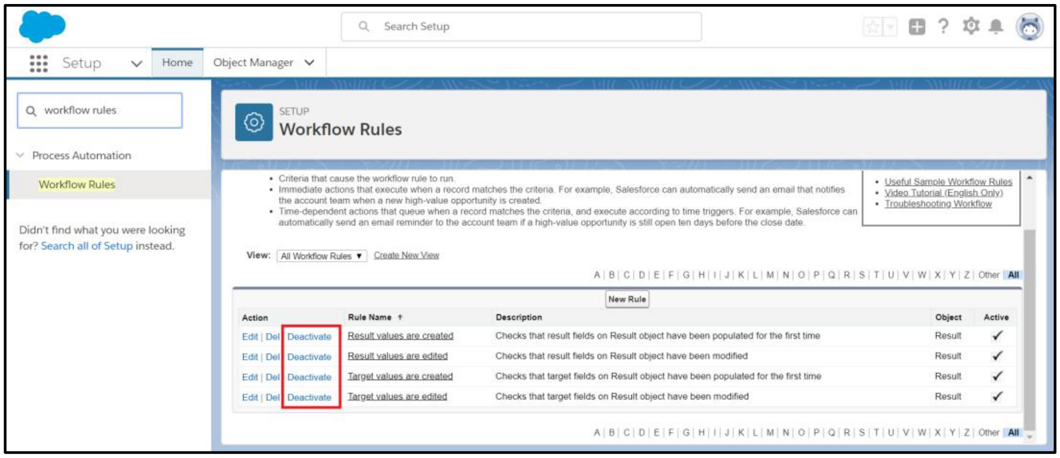


Workflow Rules

Amp Impact has four workflow rules on Result__c object, each of which are associated with at least one field update workflow action:

Workflow Rule Name	**Description**	**Workflow Action(s)**
Result values are created	Checks whether the result values on a result record are being populated for the first time	• Update ampi__Result_Created_Date__c • Update ampi__Result_Last_Modified_Date__c
Result values are edited	Checks whether the result values on a result record have been modified	• Update ampi__Result_Last_Modified_Date__c
Target values are created	Checks whether the target values on a result record are being populated for the first time	• Update ampi__Target_Created_Date__c • Update ampi__Target_Last_Modified_Date__c
Target values are edited	Checks whether the target values on a result record have been modified	• Update ampi__Target_Last_Modified_Date__c

These workflow rules and actions are *Active* on installation of the managed package. They can be deactivated if your organization does not wish to use them. To do so, go to the Setup Quick Search box, and search for "Workflow Rules". Click "Deactivate" next to any Workflow Rules that your organization does not want to use.

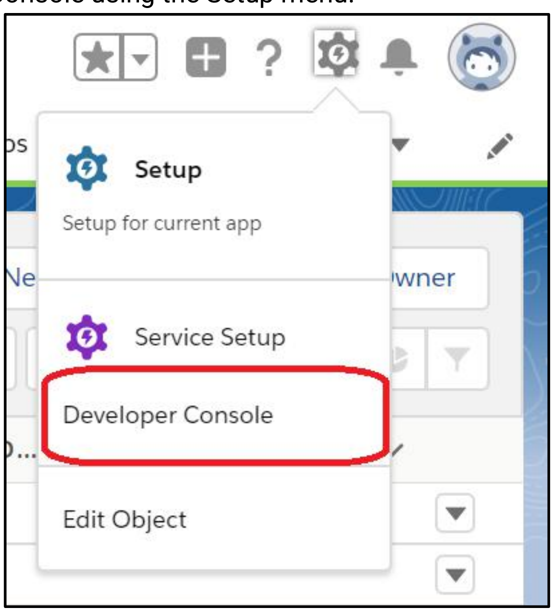


Uninstallation Steps

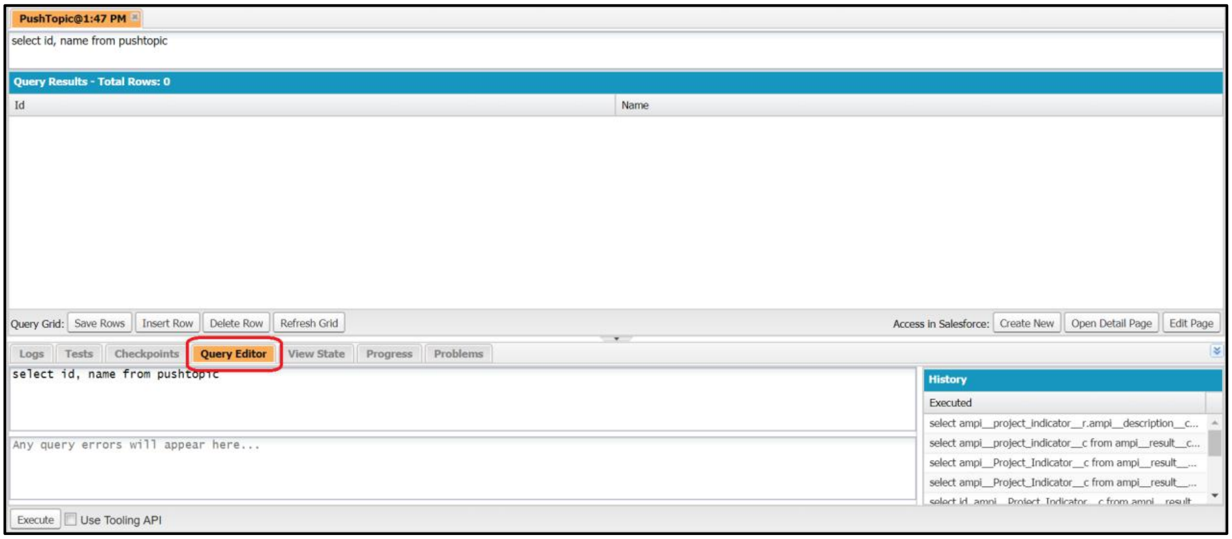
Before uninstalling the Amp Impact managed package from a Salesforce org, certain manual steps must be taken for the uninstall process to succeed. For official Salesforce documentation on uninstalling managed packages, click here.

Delete PushTopic

1. Open the Developer Console using the Setup menu.



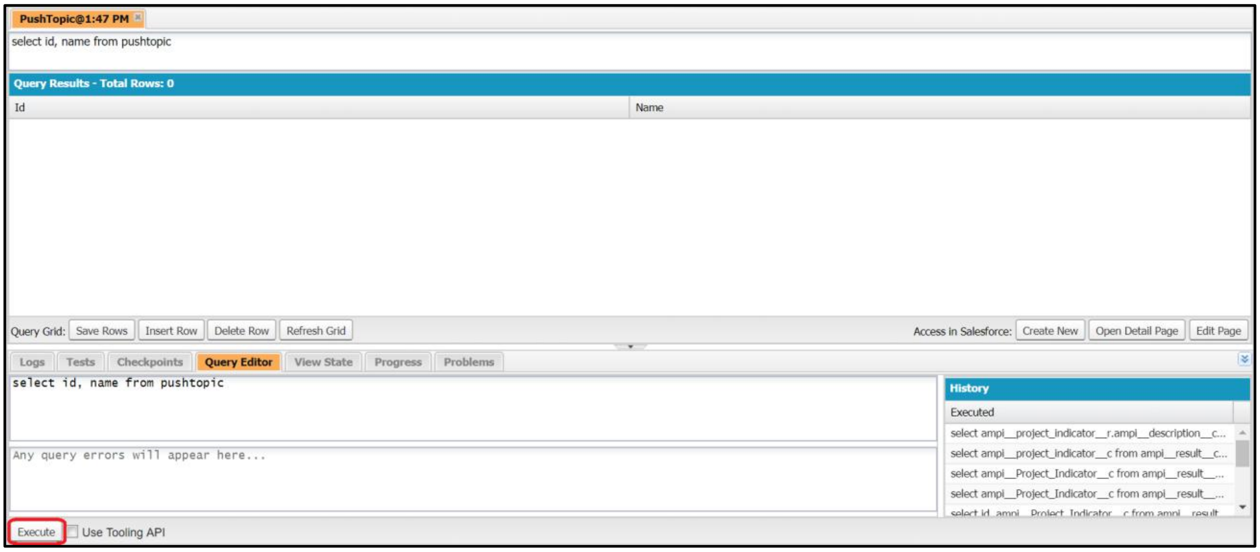
2. In the Developer Console, click “Query Editor” in the tabs along the bottom.



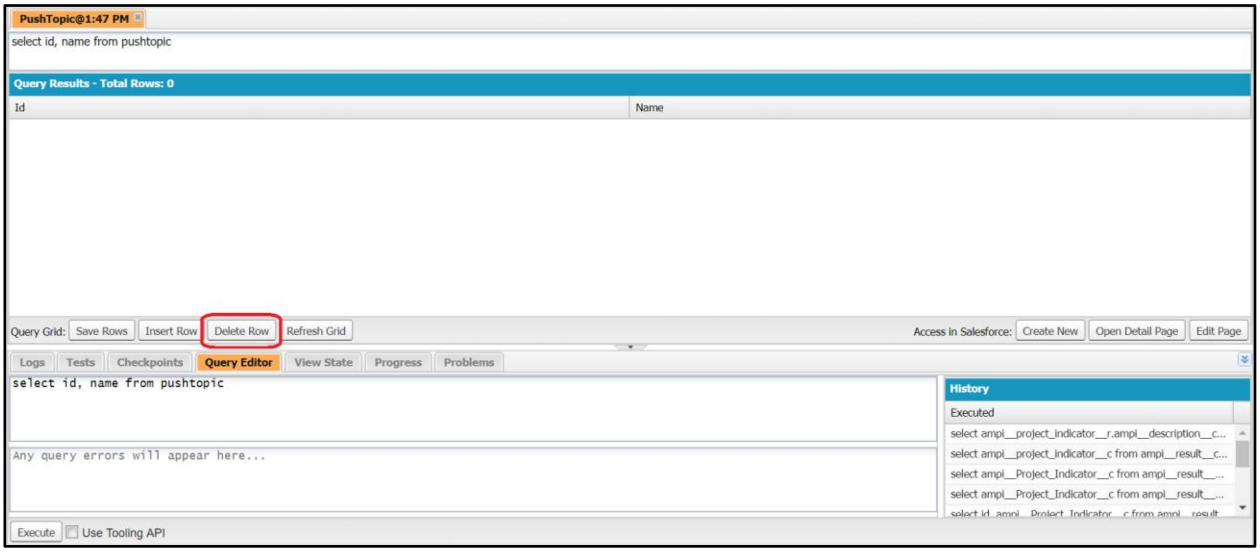
3. In the “Query Editor”, enter the following string:

```
select id, name from pushtopic
```

4. Click “Execute” in the bottom left.



5. Select the PushTopic named “AggregateCalculateUpdate”.
6. Click “Delete Row”.



Unassign Lightning Record Pages

All Amp Impact Lightning Record Pages must not have any custom assignments before uninstallation. Follow the steps below to ensure that these custom assignments do not prevent package uninstallation.

1. Open Setup.
2. Use the QuickFind menu to click Lightning App Builder.
3. For each page managed by Amp Impact that has been activated in the system:
    a. Click “View” next to the page.
    b. Click the “Activation” button in the Lightning App Builder.
    c. Remove any Org Default, App Default, and/or App and Profile assignments, so that the page has no assignments in the end.
    d. Click “Save”.

ⓘ **Admin Note:**
Some Amp Impact Lightning Record Pages (e.g. Project) have an out-of-the-box assignment to either the Amp Impact app or the org default. Out-of-the-box assignments will not prevent uninstallation. For steps with regard to custom Lightning pages that use Amp components, go to section Custom Lightning Pages.

Unassign Permission Sets

All Amp Impact permission sets must not be assigned to any users in order for the package uninstallation to succeed. Follow the below steps to remove any user assignments from the permission sets.

1. Open Setup.

2. Use the QuickFind menu to click “Permission Sets”.
3. Open the Amp Impact Admin permission set.
4. Click “Manage Assignments”.
5. Select all users assigned the permission set and click “Remove Assignments”.
6. Repeat Steps 3-5 for every other permission set managed by Amp Impact:
    a. Submission Response
    b. Submission Review
    c. Submission Template

> ⓘ **Admin Note:**
> Custom permission sets that provide access to Amp Impact objects do not need to be altered for the uninstallation to succeed.

Deactivate Processes

Processes in the Amp Impact package must be deactivated before the package uninstallation can succeed. Follow the below steps to deactivate all Amp processes.

1. Open Setup.
2. Use the QuickFind menu to click “Process Builder”.
3. Expand the process named “Copy Objective Field Values onto Project Objective”.
4. Click “Deactivate”.
5. Expand the process named “Copy Indicator Field values onto Project Indicator”.
6. Click “Deactivate”.

> ⓘ **Admin Note:**
> These instructions only pertain to processes included in the Amp Impact package. For custom processes that reference Amp Impact objects, see section Custom Processes for uninstallation steps.

Deactivate Flows

Flows in the Amp Impact package must be deactivated before the package uninstallation can succeed. Follow the below steps to deactivate all Amp processes.

1. From Setup, enter Flows in the Quick Find box, then select Flows.
2. Click the label of the flow.
3. Click Activate or Deactivate next to the relevant version of the flow.

> ⓘ **Admin Note:**

These instructions only pertain to processes included in the Amp Impact package. For custom processes that reference Amp Impact objects, see section Custom Flow for uninstallation steps.

Custom Steps per Use Case

If customizations (e.g. custom Lightning pages, automation, etc.) have been made on top of the Amp Impact package, additional steps may be necessary before package uninstallation, depending on the type of customization(s).

Custom Lightning Pages

For any custom Lightning Pages that contain Amp Impact components (including Lightning Components, Visualforce Pages, or Amp Impact objects), those Lightning Pages need to be either deleted or edited such that they no longer reference those components.

Remove Amp Component References from Custom Lightning Page

1. Open Setup.
2. Use the QuickFind menu to click “Lightning App Builder”.
3. For each custom Lightning Page that needs Amp components removed:
    a. Click “Edit” next to the Lightning Page.
    b. Click the Delete icon for each component that references an Amp component. Some examples include (but are not limited to):
        i. Standard Visualforce Component that references an Amp Visualforce page
        ii. Standard Report Chart Component that references an Amp report / object
        iii. Custom - Managed Lightning Components from the Amp package
    c. Click “Save”.

Delete Custom Lightning Page

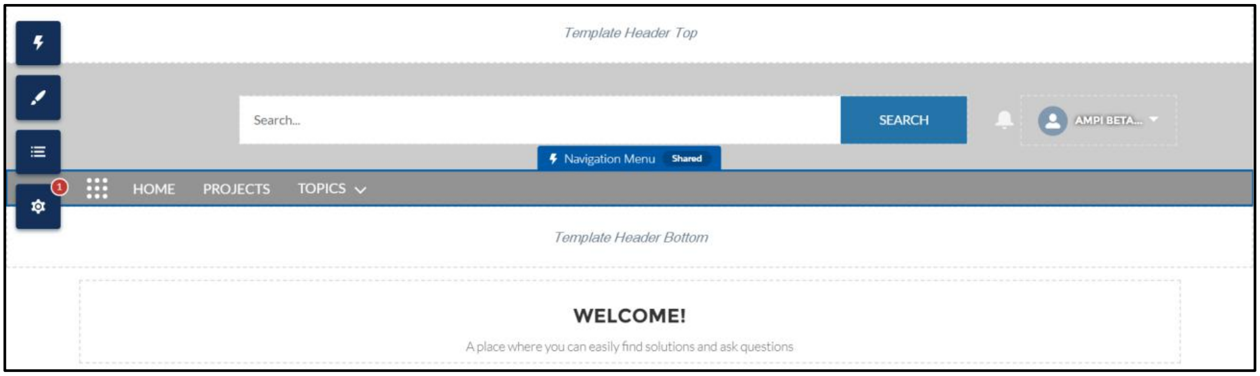
1. Open Setup.
2. Use the QuickFind menu to click “Lightning App Builder”.
3. For each custom Lightning Page that needs to be deleted:
    a. Click “Edit” next to the Lightning Page.
    b. Click “Activation” in the Lightning App Builder.
    c. Remove any activation/assignments of the page.
    d. Return to the list of Lightning Pages by clicking “Back”.
    e. Click “Del” next to the Lightning Page.

Community

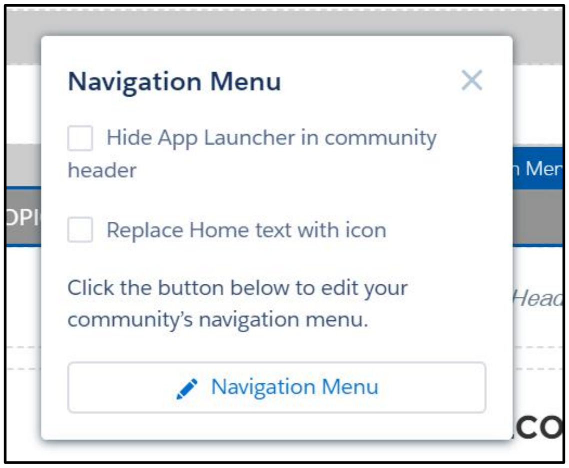
Any references to Amp Impact components must be removed from all Communities in your Salesforce system.

Navigation Menu

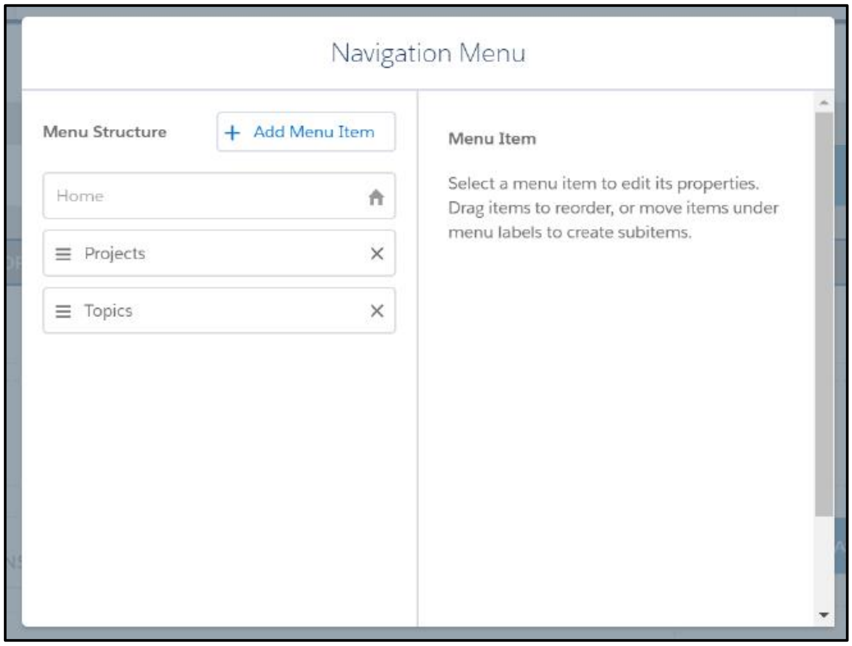
1. Open Setup.
2. Use the QuickFind menu to click “All Communities”.
3. Click “Builder” next to the Community that has a Navigation Menu that references Amp Objects.
4. Click into the Navigation Menu in the Builder.



5. In the popup that appears, click the “Navigation Menu” button.



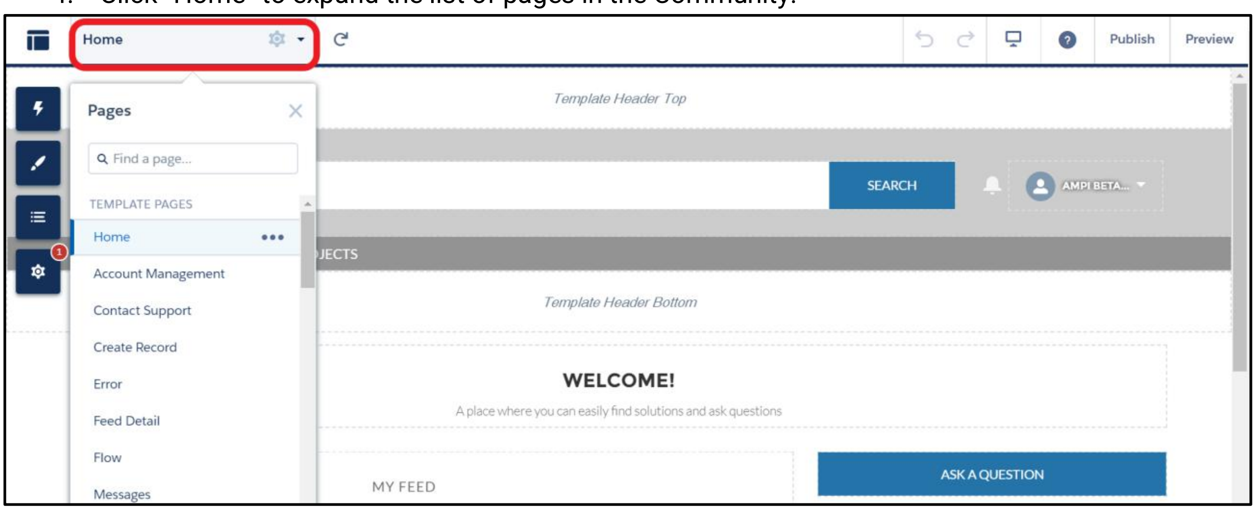
6. In the next popup that appears, click the X next to every Amp Object listed in the Navigation Menu.



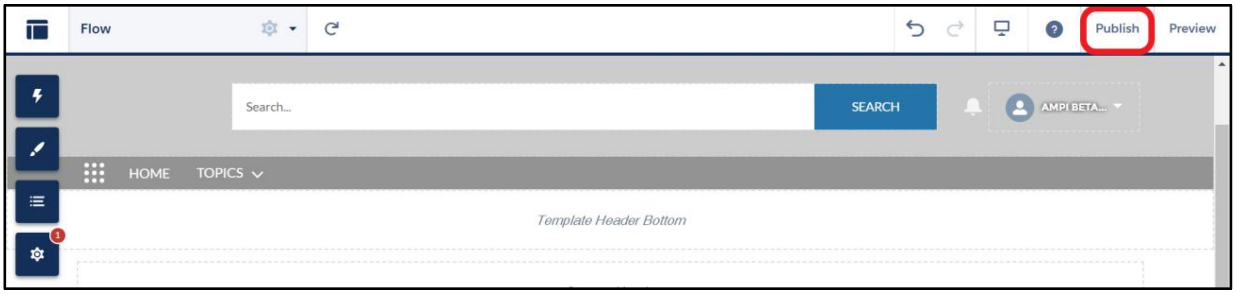
7. Click “Save” in the popup.
8. Click “Publish”.

Lightning Components

1. Open Setup.
2. Use the QuickFind menu to click “All Communities”.
3. Click “Builder” next to the Community that has Object Pages that reference Amp Components.
4. Click “Home” to expand the list of pages in the Community.

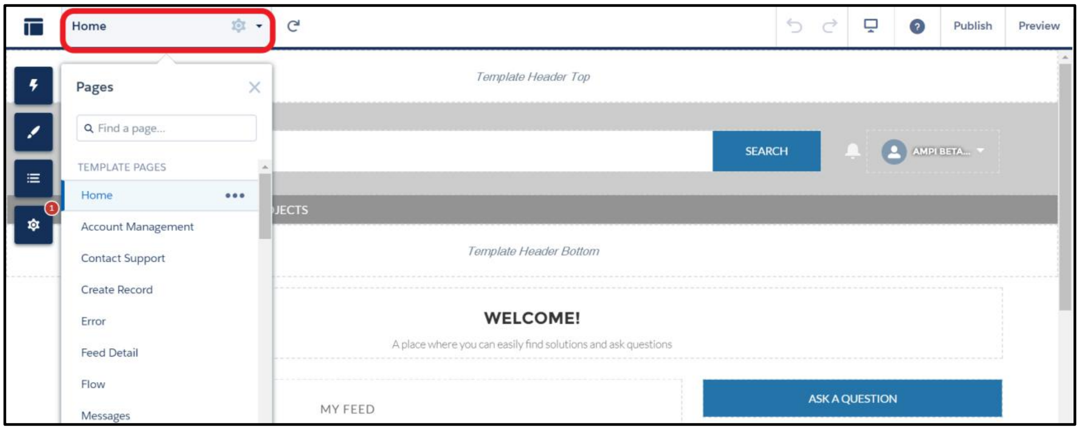


1. Click the Template Page that is referencing an Amp Component.
2. In the Community Builder, remove any component that either belongs to the Amp Impact package (e.g. ActivityChart Lightning Component) or references an Amp Impact component (e.g. Report Chart component that references an Amp Impact object) from the page.
3. Repeat Steps 4-6 for every page that contains an Amp Impact component.
4. Click “Publish”.

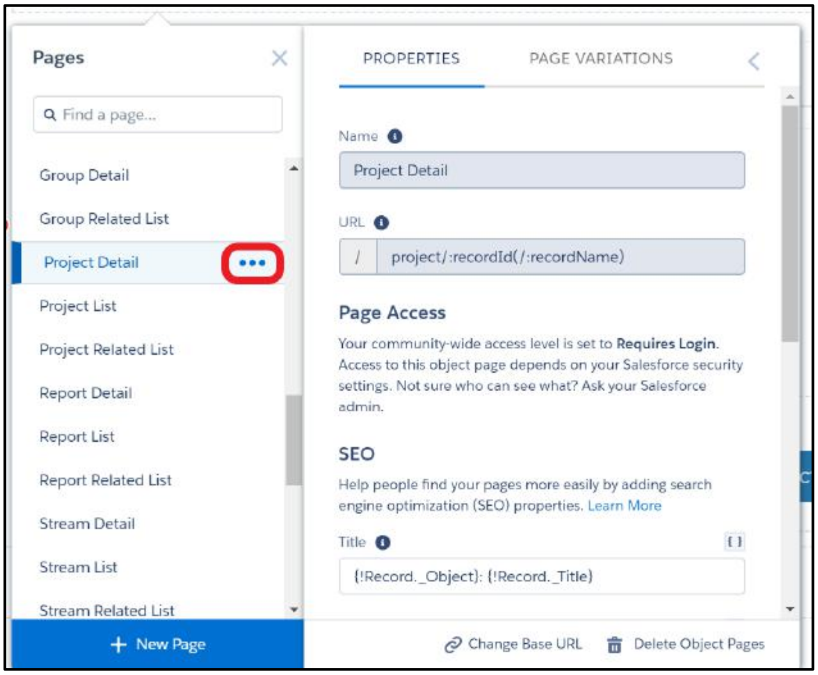


Object Pages

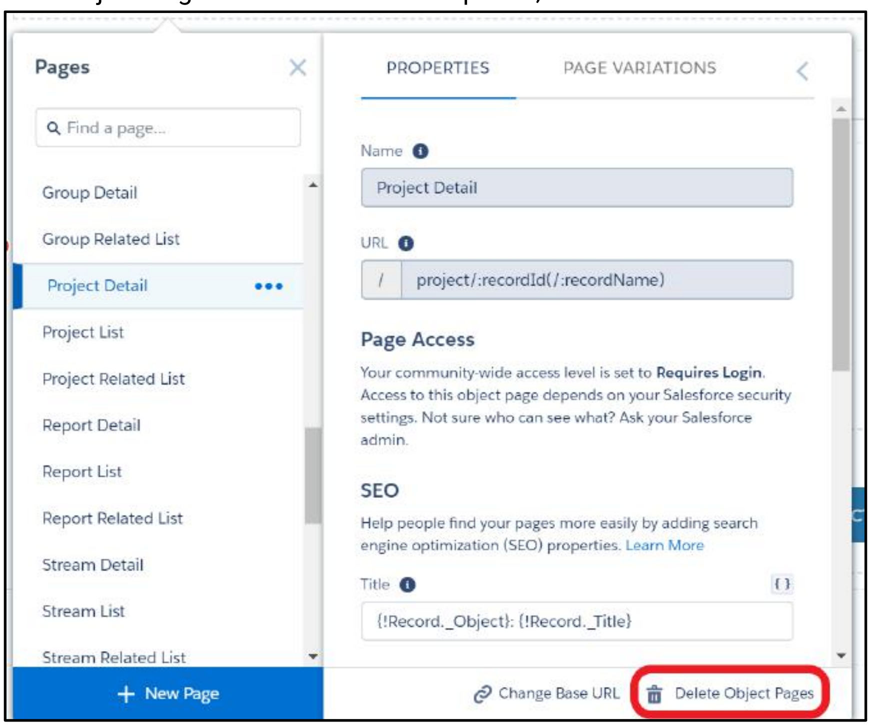
1. Open Setup.
2. Use the QuickFind menu to click “All Communities”.
3. Click “Builder” next to the Community that has Object Pages that reference Amp Objects (e.g. Project, Submission, etc.).
4. Click “Home” to expand the list of pages in the Community.



5. Click the ellipsis [...] next to the Object Page that references an Amp Object.

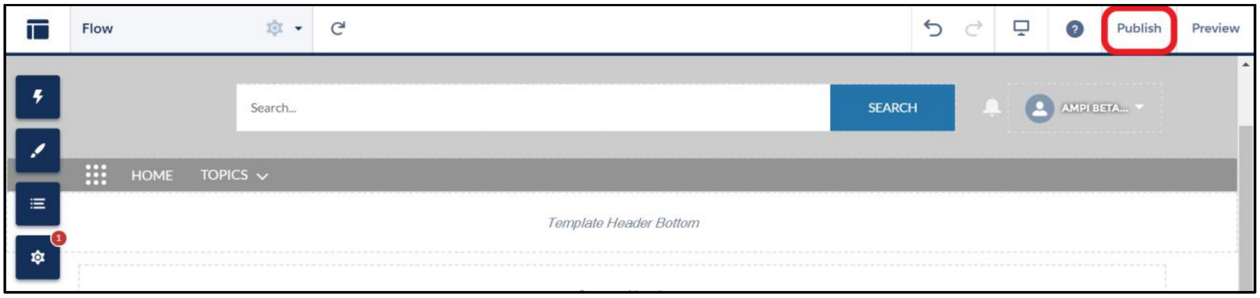


6. Click “Delete Object Pages” in the menu that expands, and confirm the delete in the popup.



7. Repeat Steps 4-6 for every Object Page that references an Amp Object.

8. Click “Publish”.



Permission Sets

1. Open Setup.
2. Use the QuickFind menu to click “All Communities”.
3. Click “Workspaces” next to the Community that has Object Record Pages that reference Amp Objects.
4. Click the Administration tile in the Community Workspace.
5. Click “Members” in the Administration side menu.
6. Scroll to the “Select Permission Sets” section. Move any Amp Impact permission sets (e.g. Amp Impact Admin, Submission Response) from the “Selected Permission Sets” list to the “Available Permission Sets” list.
7. Click Save.

Automation

Any custom automation that has been built to reference Amp Impact components (e.g. objects, fields, et al) must be deactivated or deleted for the package uninstallation to succeed.

Custom Processes

Custom processes that reference any Amp Impact components must be <u>deleted</u> before uninstalling the package.

1. Open Setup.
2. Use the QuickFind menu to click “Process Builder”.
3. Expand the custom process that references the Amp Impact component(s).
4. Make sure all versions of the custom process are Inactive.
    a. If a version is Active, open that version of the process and click the Deactivate button.
5. Click Delete next to the process. If there are multiple versions, each version must be deleted before uninstalling Amp Impact.
6. Repeat Steps 3-5 for every custom process that references Amp Impact components.

Custom Flow

Custom flows that reference any Amp Impact components must be deleted before uninstalling the package.

1. Open Setup.
2. Use the QuickFind menu to click “Flow”.
3. Open the custom flow that references the Amp Impact component(s).
4. Make sure all versions of the custom flow are Inactive.
    a. If a version is Active, click the Deactivate button next to that version.
5. Click the Delete button for the flow.
6. Repeat Steps 3-5 for every custom flow that references Amp Impact components.

Uninstall the Amp Impact Package

Once all the above steps are complete, then proceed with the actual uninstallation of the Amp Impact managed package.

1. Open Setup.
2. Use the QuickFind menu to click “Installed Packages”.
3. Click “Uninstall” next to the Amp Impact package.
4. In the next screen, you will be prompted to save a copy of this package’s data for 48 hours after uninstall. This temporarily saves all data and metadata from the package in case you need to re-install the package and re-upload your historical data.
5. Check the box next to “Yes, I want to uninstall this package and permanently delete all associated components”.
6. Click *Uninstall*.