Amp Impact

Upgrade Instructions

Release Date: Nov 2019 | Version Name: Bellatrix (Fall 2019) | Version Number: 1.23

1. To upgrade to the latest release of Amp Impact, log into your Sandbox environment and use this installation link:

   https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4o000001Zh9e

   a. Information will be displayed confirming that you have an earlier version installed and it can be upgraded while preserving existing data.
   b. Select which users you wish to install the package for.
   c. Click "Upgrade".
2. Refer to the release notes document and learn about the new features and bug fixes for this release.
3. After reviewing the release notes, follow the steps outlined below.
4. Perform your current use cases in the sandbox and if you are using any of the new features from this release, ensure that they are operating as expected.
5. When you are ready to deploy to Production, use this installation link:

   https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4o000001Zh9e

6. Update any changes you make, for example to custom settings, in Production as these will not "carry over" from your sandbox.

￼ If My Domain has already been set up, replace “test” or “login” in the installation links with the specific domain for the org.

Packaging Changes

Certain changes in the configuration will be automatically updated on installation of the upgrade, while others will need to be manually updated (in order not to conflict with any org-specific customization).

The table below details which configuration changes need to be made manually, and if so, also include an example of where to change them:

Amp **Impact**

Component	Automatic Update?	Manual Update Location	Example from Fall 2019 Release
New custom field	Yes		New ampi__IATI_Humanitarian__c field added to ampi__Project__c object
Updated Permission Set	Yes		New ampi__Risk__c object added to Amp Impact Admin permission set
Updated Lightning Record Page	Yes		Risk tab is added to Project Lightning page
New Field Sets	Yes		New field set ampi__INDICATOR_CATALOG_SEARCH_FILTER added to ampi__Indicator__c object
Updated Field Sets	Yes[1]	Object → Field Sets	Updated ADD_RESULTS_INFO_POPOVER on ampi__Project_Indicator__c
New custom label	Yes		New custom label RUN_PROJ_AGG_CALC_BATCH_BTN added to Manage Indicators page
Updated custom label	Yes		Updated custom label PREPARE_RP_FINANCIAL_UPLOAD_3 on Budget Upload Excel
New global value set	Yes		New Picklist Global Value Set IATI_Aid_Type_Vocabulary added
New Validation Rule	Yes		New Validation Rule Selected_Activity_Outside_Project added to ampi__Risk__c object
New Report Name	Yes	Reports → Report Builder → Properties	New Report "Risks with Risk Assessments" added
Picklist values	No	Object → Field	Edited API Names of Picklist values of ampi__Budget_Status__c from 'Indicative' and 'Committed' to '1' and '2' on ampi__Budget__c object
Page Layouts	No	Object → Page Layout	New Risk Assessments related list added to Risk record page layout

[1] If a new field is added to a field set by upgrading the package, the field will be **appended to the end** of the field set that already exists in the org. Additional setup may be needed to reorder the field set.

Enable Risk Management Module

Risk management is now generally available in Amp Impact. The Project Lightning record page now includes a tab called Risk. If you plan to use Risk Management, add the Risk Registers related list to the Project page layout in order for the Risk tab in the Project Lightning record page to display correctly.

If you want to use Risk on a custom Project page, that must be configured manually.

If your organization will not be tracking Risks, then clone the Project Lightning Record page and remove the Risks tab. Activate the page as either the organization default or assign it to specific user profiles.

Set Up Users for Platform Events

Amp Impact now informs users of data changes across tabs on Project record. This will be auto-updated in the "Amp Impact Admin" permission set, but for any other custom permission sets /profiles, access to the following feature should be provided:

1. Custom Platform Event: Visualforce_Update__e
    a. Custom field: Visualforce_Update__e.Publisher_Page__c
    b. Custom field: Visualforce_Update__e.Subscribers__c

Set Up Grantee Reporting in Communities

With the new Grantee Reporting functionality in Amp Impact, it is now easier for grantees to report on their program to funders and for grant makers to visualize the results and progress of a grant. To know more about this, please refer to our Setup Guide and User Guide for Grantee Reporting.

Customize Search Filters on Pages

In Amp Impact, currently, users can only filter Indicators and Project Indicators by Thematic Area, Data Type, and Geographic Area on the Manage Indicators page, and by Thematic Area, Project Objective, Data Type and Geographic Area on the Set Targets / Add Results pages.

With this release, administrators can now customize the search filters for Indicators and Project Indicators on Manage Indicators, Add Results, and Set Targets pages based on the organization's requirements, including custom fields that are added to the Indicator and Project Indicator objects. The following field sets can be used to customize the filter list on the respective pages:

Field Set Name	Object	Component/Page	Default Fields
ampi__INDICATOR_CATALOG_SEARCH_FILTER	ampi__Indicator__c	Indicator Catalog tab on Manage Indicators page on Project record	ampi_Data_Type_c ampi_Geographical_Disaggregation_c ampi_Reporting_Frequency_c ampi_Thematic_Area_Text_c
ampi__PROJECT_INDICATORS_SEARCH_FILTERS	ampi__Project_Indicator__c	Selected Indicators and Deactivated Indicators tabs on Manage Indicators page on Project record	ampi_Data_Type_c ampi_Geographical_Disaggregation_c ampi_Reporting_Frequency_c ampi_Thematic_Area_Text_c
ampi__ST_SEARCH_FILTERS	ampi__Project_Indicator__c object	Set Targets page on Project record	ampi_Data_Type_c ampi_Thematic_Area_Text_c
ampi__AR_SEARCH_FILTERS	ampi__Project_Indicator__c	Add Results page on Project record	ampi_Data_Type_c ampi_Thematic_Area_Text_c

Customize UI on Visualforce Pages and Lightning Components

 Existing UI will not be affected by this feature update. Custom setting records/design attributes should only be updated/modified if you want to hide any functionality from specific profiles/users.

With this new update, System Admins have more flexibility in setting the visibility of buttons, icons, and input boxes for profiles/users. The following custom settings and design attributes have been created or updated for this flexibility:

1. New custom settings:
    a. ampi__ManageIndicators__c
        i. ampi__Hide_Add_New_Custom_Indicator_Button__c
            - If TRUE, *Add New Custom Indicator* button is hidden on Manage Indicators page
            - If FALSE (default), *Add New Custom Indicator* button is visible on Manage Indicators page
        ii. ampi__Hide_Edit_Icon__c
            - If TRUE, *Edit* icon is hidden on Manage Indicators page
            - If FALSE (default), *Edit* icon is visible on Manage Indicators page
        iii. ampi__Hide_Delete_Icon__c
            - If TRUE, *Delete* icon is hidden on Manage Indicators page
            - If FALSE (default), *Delete* icon is visible on Manage Indicators page
        iv. ampi__Hide_Comments_Icon__c
            - If TRUE, *Comments* icon is hidden on Manage Indicators page
            - If FALSE (default), *Comments* icon is visible on Manage Indicators page
        v. ampi__Hide_Settings_Icon__c
            - If TRUE, *Settings* icon is hidden on Manage Indicators page
            - If FALSE (default), *Settings* icon is visible on Manage Indicators page
        vi. ampi__Hide_Refresh_Icon__c
            - If TRUE, *Refresh* icon is hidden on Manage Indicators page
            - If FALSE (default), *Refresh* icon is visible on Manage Indicators page
        vii. ampi_Hide_Refresh_Indicators_Button_c
            - If TRUE, *Refresh Indicators* button is hidden on Manage Indicators page

- If FALSE (default), *Refresh Indicators* button is visible on Manage Indicators page

viii. ampi__Hide_Add_Selected_Button__c
   - If TRUE, *Add Selected* button is hidden on Manage Indicators page
   - If FALSE (default), *Add Selected* button is visible on Manage Indicators page

ix. ampi__Hide_Activate_Selected_Button__c
   - If TRUE, *Activate Selected* button is hidden on Manage Indicators page
   - If FALSE (default), *Activate Selected* button is visible on Manage Indicators page

b. ampi__Activities__c

   i. ampi__Hide_Add_New_Activity_Button__c
      - If TRUE, *Add New Activity* button is hidden on Activities page
      - If FALSE (default), *Add New Activity* button is visible on Activities page

   ii. ampi__Hide_Edit_Icon__c
      - If TRUE, *Edit* icon is hidden on Activities page
      - If FALSE (default), *Edit* icon is visible on Activities page

   iii. ampi__Hide_Delete_Icon__c
      - If TRUE, *Delete* icon is hidden on Activities page
      - If FALSE (default), *Delete* icon is visible on Activities page

c. ampi__ManageDisbursements__c

   i. ampi__Hide_Add_New_Disbursement_Button__c
      - If TRUE, *Add New Disbursement* button is hidden on Manage Disbursements page
      - If FALSE (default), *Add New Disbursement* button is visible on Manage Disbursements page

   ii. ampi__Hide_Edit_Icon__c
      - If TRUE, *Edit* icon is hidden on Manage Disbursements page
      - If FALSE (default), *Edit* icon is visible on Manage Disbursements page

   iii. ampi__Hide_Delete_Icon__c
      - If TRUE, *Delete* icon is hidden on Manage Disbursements page
      - If FALSE (default), *Delete* icon is visible on Manage Disbursements page

   iv. ampi__Hide_New_Budget_Button__c
      - If TRUE, *New Budget* button is hidden on Manage Disbursements page

        - If FALSE (default), *New Budget* button is visible on Manage Disbursements page
    d. ampi__ManageLogframes_c
        i. ampi__Hide_Add_New_Framework_Item_Button__c
            - If TRUE, *Add New Framework* button is hidden on Manage Logframes page
            - If FALSE (default), *Add New Framework* button is visible Manage Logframes page
        ii. ampi__Hide_Edit_Icon__c
            - If TRUE, *Edit* icon is hidden on Manage Logframes page
            - If FALSE (default), *Edit* icon is visible Manage Logframes page
        iii. ampi__Hide_Delete_Icon__c
            - If TRUE, *Delete* icon is hidden on Manage Logframes page
            - If FALSE (default), *Delete* icon is visible Manage Logframes page
2. Updated custom settings
    a. ampi__SetTargets__c
        i. ampi__Hide_Comments_Icon__c
            - If TRUE, *Comments* icon is hidden on Set Targets page
            - If FALSE (default), *Comments* icon is visible Set Targets page
        ii. ampi__Hide_Download_Excel_Button__c
            - If TRUE, *Download Excel* button is hidden on Set Targets page
            - If FALSE (default), *Download Excel* button is visible Set Targets page
        iii. ampi__View_Only_Mode__c
            - If TRUE, Input boxes are greyed out and locked for input on Set Targets page
            - If FALSE (default), Input boxes are available for input on Set Targets page
    b. ampi__AddResults__c
        i. ampi__Hide_Comments_Icon__c
            - If TRUE, *Comments* icon is hidden on Add Results page
            - If FALSE (default), *Comments* icon is visible Add Results page
        ii. ampi__Hide_Download_Excel_Button__c
            - If TRUE, *Download Excel* button is hidden on Add Results page
            - If FALSE (default), *Download Excel* button is visible Add Results page
        iii. ampi__View_Only_Mode__c
            - If TRUE, Input boxes are greyed out and locked for input on Add Results page

            ■ If FALSE (default), Input boxes are available for input on Add Results page

3. New design attributes
    a. Design attributes on SubmissionResponseScoring component
        i. viewOnly
            ■ If TRUE, Input boxes are greyed out and locked for input
            ■ If FALSE (default), Input boxes are available for input
        ii. canHideDownloadButton
            ■ If TRUE, *Download* button is hidden
            ■ If FALSE (default), *Download* button is visible
        iii. canHideSubmitButton
            ■ If TRUE, *Submit* button is hidden
            ■ If FALSE (default), *Submit* button is visible
    b. Design attributes on SubmissionResponseForm component
        i. viewOnly
            ■ If TRUE, Input boxes are greyed out and locked for input
            ■ If FALSE (default), Input boxes are available for input
        ii. canHideDownloadButton
            ■ If TRUE, *Download* button is hidden
            ■ If FALSE (default), *Download* button is visible
        iii. canHideSubmitButton
            ■ If TRUE, *Submit* button is hidden
            ■ If FALSE (default), *Submit* button is visible

> With introduction of UI customization on the SubmissionResponseForm Lightning Component using these design attributes, SubmissionResponseReview component is now effectively redundant. For example, System Admins can assign SubmissionResponseForm to a user or profile for submission review by setting ‘viewOnly’ as TRUE to provide a ‘review-only’ experience for that user/profile.

Aggregated Indicators: Set an aggregation criteria by filtering on a 'Date' field

? This step is optional, and is only relevant for organization using dates in the filter for aggregations.

To make aggregations work on aggregation criteria by filtering on a 'Date' field, the date format for filters on aggregation criteria has been changed to 'YYYY-MM-DD' from 'MM/DD/YYYY'. If your organization using dates in the filter for aggregations they will have to update the dates to 'YYYY-MM-DD' format by manually updating the Aggregation Setting for each aggregated indicator that has a date filter.

Override Content Security Policy for Internet Explorer

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

Create CSP Trusted Site record

? This step is optional, as it is only relevant for users downloading "Performance Graphs" from a community.

As per Salesforce's content security policy in lightning communities, users may face an issue while trying to download images of graphs from a community. To avoid this, you should create a CSP trusted site record using steps listed here.

Custom Settings: Configure triggers in Dynamic Loader

When upgrading to v1.23, the Dynamic Loader custom settings for new triggers will be automatically installed and activated.

If certain triggers will not be used by an organization (e.g. your organization does not track Thematic Areas and will not need Thematic Area names to roll up onto any other object), you can deactivate them.

1. Open Setup and go to Custom Settings.
2. Click 'Manage' next to the Dynamic Loader custom setting.
3. Click 'Edit' next to the record for the trigger you want to deactivate.
4. Set the 'Active' field as FALSE and click 'Save.'

Page Layout Changes

Per the release notes, page layout changes have been made on multiple objects, as a result of the addition of new fields in most cases. These page layout changes will not be reflected when you upgrade. This is to ensure that any customizations made by users are not overridden. Please review the Packaging Changes section of the release notes in detail and determine which, if any, of the layout changes you would like to replicate. If there are any, please do so manually.

Automation: Process Builder Template & Workflow

The Process Builder that copies the field values from a catalog Objective record onto a Project Objective record has been changed to Process Builder Template in this release, it can be customized as per your organizational needs. To do that, navigate to "Process Builder" in setup, click on Process name and click on "Clone" button.

Refer to the Installation Guide to deactivate the Process Builder Template, or to deactivate the four Workflow Rules that enable target/result field history tracking on a Result record.