

Upgrade Instructions

Version Name: Delphinus | Release Date: Fall 2020 | Version Number: v1.25.2

Our upgrade instructions provide guidance on new features that require manual updates in order not to conflict with any org-specific customization. Detailed information on Set-up, Configuration and Feature Information is available in the Installation Guide and User Guide for each release.

Contact hshah@verasolutions.org to share feedback.

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Upgrading Amp Impact to Delphinus - v1.25.2

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=04t4o000001zqbD>

2. Information will be displayed confirming that you have an earlier version installed and it can be upgraded while preserving existing data.
3. Select which users you wish to install the package for (learn more [here](#)).
4. Click "Upgrade".
5. Refer to the release notes document and learn about the new features and bug fixes for this release.
6. After reviewing the release notes, follow the steps outlined below.
7. 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.
8. When you are ready to deploy to Production, use this installation link:

<https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4o000001zqbD>

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

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
```

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 types of configuration changes need to be made manually, and if so, also include an example of where to change them. For full details of what has been added or modified, refer to the Packaging Changes section in the Release Notes.

Change	Automatic Update?	Manual Update Location	Example from Delphinus Release
New object	Yes		New ampi__Modification__c object
New custom metadata type record	Yes		New record Objective_Parent_Project_Objective added for the custom metadata type ampi__Object_Lookup_Label_Mapping__mdt
New field	Yes		New field ampi__Date_Response__c added to ampi__Question__c
New custom label	Yes		New custom label FIRST_PAGE
New process	Yes		New process ampi__Copy_Indicator_Field_Values_Onto_Project_Indicator
Updated permission set	Yes		Read/Edit access added to ampi__Date_Response__c on ampi__Question__c in the Amp_Impact_Admin permission set
Updated character limit for fields	Yes		Character limit for ampi__Reporting_Period_Text__c on ampi__Project_Indicator__c increased to 7500
Updated default value for fields	Yes		Default value for ampi__Red_Yellow_Threshold__c on ampi__Project_Indicator__c set to 75
Updated formula for fields	Yes		Updated formula for ampi__Name_Translated__c on ampi__Project__c to avoid returning NULL values
Updated custom label	Yes		Updated value of custom label UNDERSTAND_DOWNLOADED_BUDGET_1 to be "1. The third tab in this sheet contains the data for a Budget."
Deleted custom label	Yes		Deleted custom label PREPARE_RP_FINANCIAL_UPLOAD_7
Updated field sets	Yes ¹	Object - Field Sets	Added ampi__Description__c to the

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.

Added help text for fields	No	Object → Fields and Relationships	Help text is added for formula fields like <code>ampi__Indicator_Code</code> on <code>ampi__Project_Indicator__c</code>
Updated page layouts	No	Object → Page Layouts	Modification Related List added to <code>ampi__Project__c</code> page layout
Updated picklist values for field	No	Object → Fields and Relationships	“Short Text” and “Date” added as picklist values to the <code>ampi__Response_Type__c</code> picklist field on <code>ampi__Submission__c</code>

Update Field Sets for Manage Indicators Tables

Admin Note:

This step is optional and should only be followed if the Indicator Definition should remain the first column in the tables on the Manage Indicators Visualforce page and/or Lightning Web Component. Other fields may also be defined as the first column in these tables.

Due to the increased flexibility in the display of the Manage Indicators Visualforce page and Lightning Web Component, the following field sets need to be modified to maintain the user interface from the previous releases:

Object API Name	Field Set API Name	Update(s)
<code>ampi__Indicator__c</code>	<code>ampi__CATALOG_INDICATORS_TABLE</code>	Move <code>ampi__Description_Translated__c</code> first field in the field set.
<code>ampi__Project_Indicator__c</code>	<code>ampi__SELECTED_PROJECT_INDICATORS_TABLE</code>	Move <code>ampi__Description_Translated__c</code> first field in the field set.
<code>ampi__Project_Indicator__c</code>	<code>ampi__DEACTIVATED_PROJECT_INDICATORS_TABLE</code>	Move <code>ampi__Description_Translated__c</code> first field in the field set.

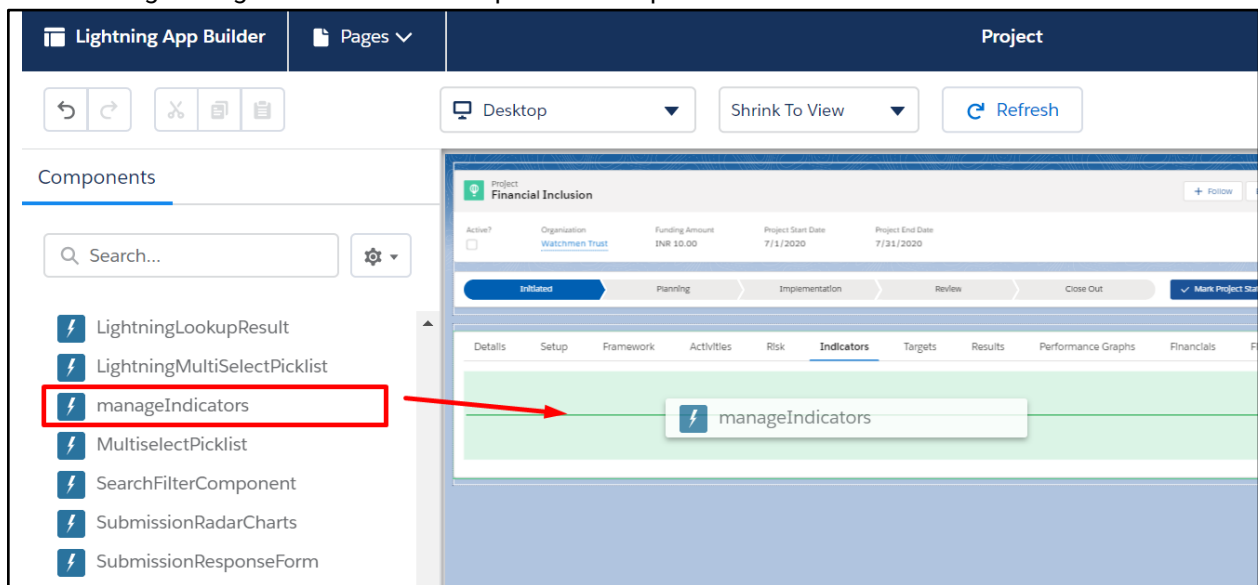
Switch to the New manageIndicators Lightning Web Component

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:

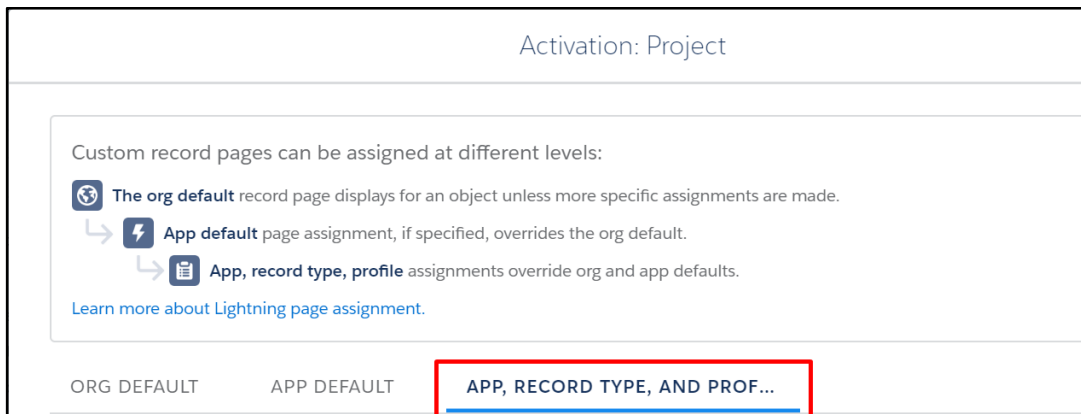
Admin Note:

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.

Additional Setup for Submissions Enhancements

ⓘ Admin Note:

This step is required to continue using the Submissions functionality, particularly the new response types (short text and date) introduced in this release.

This release provides several enhancements to Submissions, such as the new question/response type of date and short text.

Provide Access to Response Type picklist value for Short Text and Date

Due to the special behavior of picklist values in upgraded managed packages, upgrading Amp will not automatically add the new options of Date and Short Text options to the `ampi__Response_Type__c` field on `ampi__Question__c`, and the Date and Short Text picklist values must be manually added in order to allow users to create and respond to these questions in Submissions.

1. Open Setup and go to Object Manager.
2. Open the `ampi__Question__c` object.
3. Open Fields & Relationships.
4. Click on the `ampi__Response_Type__c` field.
5. Navigate to the Values section and click the 'New' button.
6. In the Add Picklist Values screen:
 - a. Type 'Date' into the text box.
 - b. Select the checkboxes next to Record Type Name to select both Answer and Question to enable the picklist value for both Record Types.

To add the new value to the picklist values for a particular Record Type, check the appropriate boxes below.

<input checked="" type="checkbox"/> Record Type Name	Description
<input checked="" type="checkbox"/> Answer	Cloned versions of template questions that can also track responses and review scores
<input checked="" type="checkbox"/> Question	Template versions of Questions for a Submission, which are cloned for Answers in response Submissions

7. Click 'Save'.
8. Repeat steps #1-5 to add 'Short Text' as a Response Type
9. In the Add Picklist Values screen:
 - a. Type 'Short Text' into the text box
 - b. Select the checkboxes next to Record Type Name to select both Answer and Question to enable the picklist value for both Record Types.
10. Select the checkboxes next to both Answer and Question at the bottom to enable the picklist value for both Record Types.
11. Click 'Save'.

Customize Process Automation for Creating Project Indicators

Admin Note:

This step is optional and only should be followed if custom fields are created on `ampi__Indicator__c` that need to be copied down to the child `ampi__Project_Indicator__c` records.

This release adds a new Process `ampi__Copy_Indicator_Field_Values_onto_Project_Indicator` that copies values entered into fields on the parent `ampi__Indicator__c` record into the fields of the child `ampi__Project_Indicator__c` record when that record is created. By default, the following fields are copied:

- `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`

This Process is packaged as a template and can be deactivated / modified by System Administrators. If you want to edit it to meet your organization's specific use case (e.g. remove default fields, add custom fields, etc.), you can [clone the process](#), [make the required changes](#) in the cloned process, and [activate the cloned process](#).

Update Profiles and Custom Permission Sets for New Objects and Fields

While permission sets in the package are automatically updated to provide access to these new objects (e.g. `ampi_Modification__c`) and fields (e.g. `ampi_Date_Response__c` on `ampi_Submission__c`), profiles and [custom permission sets](#) must be manually updated to include these new artifacts if the relevant user(s) requires access to them.

Refer to the Packaging Changes on the Release Notes to determine which objects and fields need to be added to any custom profiles or permission sets.