



Upgrade Instructions

Release Date: January 2019 | Version Name: Winter 2019 | Version Number: 1.20.1

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=04t46000001lhaP>

- 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=04t46000001lhaP>
 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:



Component	Automatic Update?	Manual Update Location	Example from Winter 2019 Release
Reports	Yes		
Report Type	Yes		ampi__Target_Frequency__c field added to Project_Indicators_w_Reporting_Periods_Results Report Type
New custom object	Yes		New ampi__Activity__c object
New custom tab	Yes		New custom tab for ampi__Activity__c object
New custom field	Yes		New ampi__Data_Tracked__c field added to ampi__Result__c object
Updated custom field	Yes		Updated formula for ampi__Total_Target__c on ampi__Result__c object
Permission Set	Yes		New ampi__Implementation_Plan__c object added to Amp Impact Admin permission set
New Lightning Record Page	Yes		New Lightning Record Pages for ampi__Implementation_Plan__c object
Updated Lightning Record Page	Yes		Add Activity Chart Lightning Component to Project Lightning Record Page
Field Sets	Yes ¹	Object → Field Sets	Added “Targets are Disaggregated?” field to the ADD_NEW_INDICATOR_POPUP field set on ampi__Indicator__c
New custom label	Yes		New custom label SELECT_IMPLEMENTATION_PLA

¹ If a 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.



			N as label for picklist in new ActivityChart Lightning Component
Page Layouts	No	Object → Page Layout	Page layout on <code>ampi__Project_Indicator__c</code> object updated to include <code>ampi__Activity__c</code> related list

Custom Settings: Configure triggers in Dynamic Loader

When upgrading to v1.20, 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.’

Custom Settings: Continue displaying Targets column(s) on AddResults

The Add Results custom setting now contains a new field Display Targets?

- If selected as FALSE, the Targets column(s) will be hidden on AddResults.
- If selected as TRUE, the Targets column(s) will be displayed on AddResults.

The display of the Targets column(s) in the Visualforce page has no impact on the display of the Targets column(s) in downloaded Excel files. The Excel’s Targets column is controlled by the Allow Targets Column Download? field in the Amp Impact Setup custom setting.

By default after upgrade, any existing Add Results custom setting records will have Display Targets? set as FALSE. To continue displaying the Targets column(s) for users, update those existing custom setting records and select Display Targets? as TRUE.



Add Results Edit Help for this Page ?

Provide values for the fields you created. This data is cached with the application.

Edit Add Results Save Cancel

Add Results Information ! = Required Information

Location	Vera Amp Impact
Display Targets?	<input checked="" type="checkbox"/>
Excel Upload Enabled?	<input checked="" type="checkbox"/>

Updating Historic Data for all Indicator and Project Indicator records

To ensure that users continue having the same user experience on STAR after the upgrade, there is a post-install script that accordingly updates the fields listed below (by object):

1. `ampi__Project_Indicator__c`
 - a. `ampi__Targets_Are_Disaggregated__c = TRUE`
2. `ampi__Project_Indicator_Reporting_Period__c`
 - a. `ampi__Data_Tracked__c = "Both"`
3. `ampi__Result__c`
 - a. `ampi__Data_Tracked__c = "Both"`

These can be updated, based on how the client tracks targets, either manually or through a data loading tool. Please read the *User Guide* for additional details on how these fields affect the display of SetTargets and AddResults.

Project Lightning Record Page

If you are using Amp Impact in Salesforce Lightning, the Project Lightning Record page now includes a tab called Activities. The tab contains the ActivityChart Lightning Component. If your organization will not be tracking Activities, then clone the Project Lightning Record page and remove the Implementation Plans tab. [Activate](#) the page as either the organization default or assign it to specific user profiles.

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 & Workflow

Refer to the Installation Guide to deactivate the Process Builder that copies the Level value from a catalog Objective record onto a Project Objective record, or to deactivate the four Workflow Rules that enable target/result field history tracking on a Result record.