

Amp Impact Release Notes

Version Name: Delphinus | Release Date: August 2020

Our release notes offer brief, high-level descriptions of new features, enhancements, and resolved issues. Detailed information on Set-up, Configuration, and Feature Information is available in the Installation Guide and User Guide for each release.

Contact hshah@verasolutions.org to share feedback.

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Key Product Features

New Features

Manage Indicators Rebuild as Lightning Web Component

To overcome the ViewState limitation of Visualforce pages, the Manage Indicators page has been rebuilt as a [Lightning Web Component](#). The majority of previous functionality is replicated on the new interface, including:

- Create custom indicators - define indicators directly on a project
- Indicators catalog - select indicators from the catalog and add them to a project
- Dynamic search filters - control the filters displayed using field sets
- Custom indicator order - set the default order of the tables based on any field

For the full suite of functionality supported on the new Lightning Web Component, please refer to the User Guide.

ⓘ Admin Note:

The Lightning Web Component version of Manage Indicators currently does not support Aggregated or Calculated Indicators. Those features are still accessible on the Visualforce page. For more details, please review the Installation Guide.

User Interface Enhancements
















While the Lightning Web Component replicates much of the interface of the Visualforce page, some improvements to the user interface have been made in this release, including:

- [Action Menu for Project Indicators](#)
- [Select Catalog Indicators Across Multiple Pages](#)
- [Multi-select Picklists Available in the Search Filters](#)
- [Multiple Steps in the Add New Indicator Popup](#)
- [Preview Disaggregation Values when Selecting the Disaggregation Group](#)

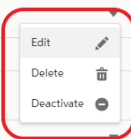
Action Menu for Project Indicators

The action icons on the Selected Indicators table have been deprecated and replaced with a dropdown action menu.

Action Icons (Visualforce)

Selected Indicators						
Indicators Catalog						
Deactivated Indicators						
Add New Custom Indicator <input type="text" value="Search"/> Show More Filters Refresh Indicators						
INDICATOR DEFINITION	DATA TYPE	REPORTING FREQUENCY	GEOGRAPHICAL DISAGGREGATION	THEMATIC AREA	TYPE OF RESULTS	
# of cases of Polio reported	Number	Monthly	Country	Child Welfare, Health	Input	  
# of Infected Persons	Number	Annual	Country	Health	Input	  
# of Quarantined Persons	Number	Monthly	Region	Health	Aggregated	     
# of Recovered Persons	Number	Monthly	State/Province	Health, Child Welfare	Input	  

Dropdown Action Menu (Lightning Web Component)

Selected Indicators						
Indicators Catalog						
Deactivated Indicators						
Add New Custom Indicator <input type="text" value="Search"/> Show More Filters						
INDICATOR DEFINITION	DATA TYPE	GEOGRAPHICAL DISAGGRE...	REPORTING FREQUENCY	CROSS-DISAGGREGATION B...	DISAGGREGATION GROUP	
Adoption of technology among loan officers	Number	Neighbourhood/Village/City	Life of Project	<input type="checkbox"/>	Age Group	
Amount deposited by Area Type	Number	Region	Monthly	<input checked="" type="checkbox"/>	Age Group	
Average income earned by participants	Milestone	Custom Area	Biannual	<input type="checkbox"/>	Age Group	
Number of Defaulting Borrowers	Qualitative	Country	Annual	<input checked="" type="checkbox"/>	Age Group	
Percent of borrowers with 2+ loans	Qualitative	Region	Monthly	<input checked="" type="checkbox"/>	Age Group	
Percentage of clients who are female	Milestone	State/Province	Monthly	<input checked="" type="checkbox"/>	Age Group	
First Previous 1 Next Last						

Select Catalog Indicators Across Pages and Add to a Project

In the Visualforce page, only Indicators on the same page could be selected in the Indicator Catalog and added to a Project at once. This means that only 10 Indicators at maximum can be added at a time to a particular Project. With the latest release, Indicators can now be selected across pages in the Indicator Catalog, so that more than 10 Indicators may be selected and added to a Project. A badge on the bottom left will inform the user of how many Indicators are selected from the total available.

Add Selected

Show More Filters

<input type="checkbox"/> INDICATOR DEFINITION	DATA TYPE	REPORTING FREQUENCY	GEOGRAPHICAL DISAGGREGATI...	DISAGGREGATION GROUP
<input checked="" type="checkbox"/> Loan repayment rate	Percent	Annual	State/Province	Level of Education
<input type="checkbox"/> Mobile money portfolio	Number	Monthly	Region	Area Type
<input checked="" type="checkbox"/> Mobile money regulation passed	Milestone	Quarterly	District	Age Group
<input type="checkbox"/> Number of Defaulting Borrowers	Number	Biannual	Custom Area	
<input type="checkbox"/> Number of new patients	Number	Annual	Country	
<input type="checkbox"/> Number of policy forums with formal representation	Number	Monthly	State/Province	
<input type="checkbox"/> Occupancy rate after handover	Percent	Quarterly	Region	Area Type
<input type="checkbox"/> People impacted	Number	Biannual	District	Age Group
<input type="checkbox"/> Percentage of clients who are female	Percent	Annual	Custom Area	Family Income
<input type="checkbox"/> Spread of Awareness	Qualitative	Monthly	Country	

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First
Previous
1
2
3
4
5
6
Next
Last

Multi-select Picklists Available in the Search Filters

With the introduction of search filters controlled by field sets, the search filters for picklists, lookups, Objective and Thematic Area long text fields will be displayed as input text. In this release, when any picklist, relationship field or the Objective/Thematic Area fields are added onto the search filter field sets, a multi-select picklist interface will be displayed as a filter.

Reporting Frequency

Guideline

Thematic Area

Community Development
Education & Awareness

Gender Equity

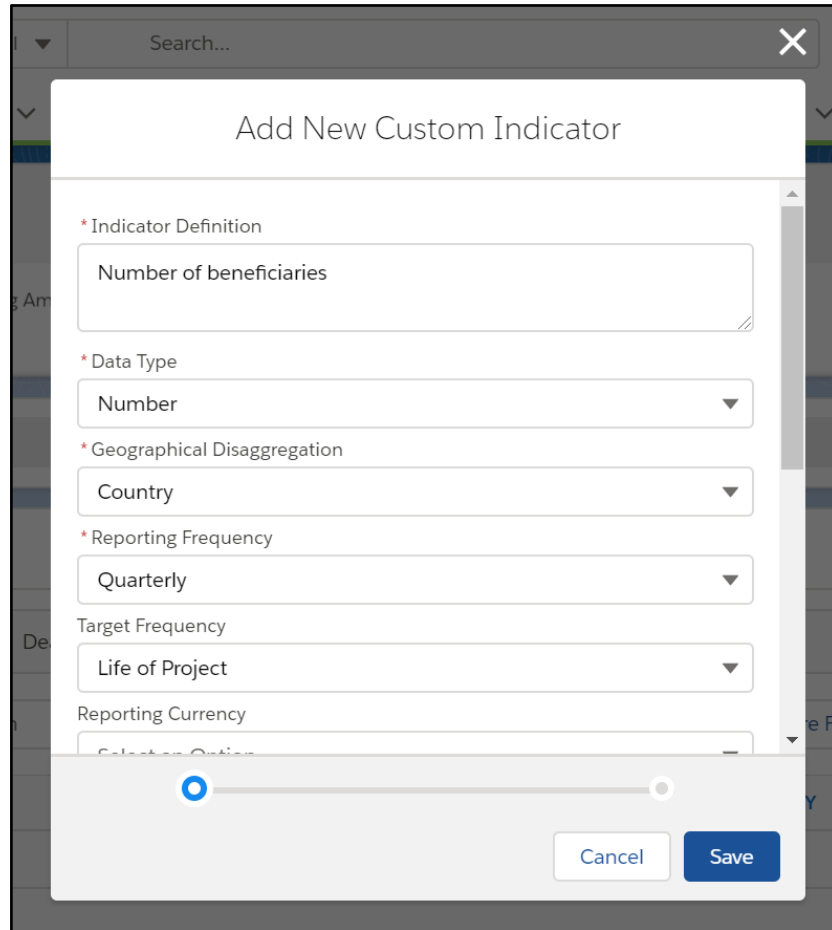
Financial Education

INDICATOR DEFINITION	DATA TYPE	REPORTING FREQUENCY	DISAGGREGATION GROUP
% increase level of awareness	Percent	Annual	Custom Area
% Increased awareness about the importance of regular saving	Percent	Monthly	Country

Split Add New Indicator Popup into Multiple Steps

The Add New Indicator Popup has been split into multiple steps/popups to differentiate data that should sit at the Catalog-level (e.g. Data Type, disaggregation levels) and data that should sit at the Project-level (e.g. Baseline, Life of Project Target). This creates a more wizard-like experience, instead of a single popup that one has to scroll through extensively.

Catalog-level Indicator Data



Search... X

Add New Custom Indicator

* Indicator Definition
Number of beneficiaries

* Data Type
Number

* Geographical Disaggregation
Country

* Reporting Frequency
Quarterly

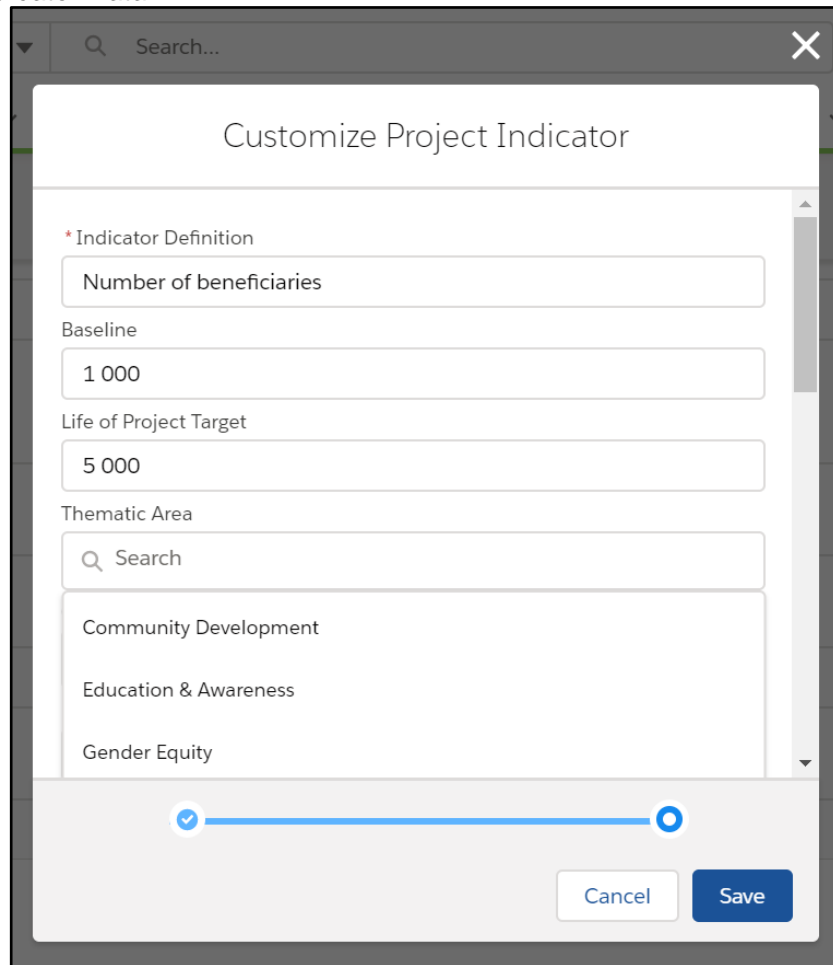
Target Frequency
Life of Project

Reporting Currency

Selection Option

Cancel Save

Project-level Indicator Data



Search...

Customize Project Indicator

* Indicator Definition

Baseline

Life of Project Target

Thematic Area

Community Development
 Education & Awareness
 Gender Equity

✓

Cancel Save

Admin Note:

The Edit Project Indicator Popup continues to be a single popup. Learn more how to control the fields displayed in each popup in the Installation Guide.

Preview Disaggregation Values when Selecting the Disaggregation Group

In the Visualforce page, when editing an indicator's Disaggregation Group, a user would only see the Disaggregation Group's name. Now in the Lightning Web Component, the dropdown picklist used to select a Disaggregation Group also displays a preview of the Disaggregation Group's Disaggregation Values. This gives the user more context on the disaggregation levels for which they will be reporting on that indicator.

Disaggregation Group

Area Type

Rural, Urban

Age Group

0-18, 19-60, >61

Family Income

Above 10000, Between 1000 and 10000, Less than 1000

Level of Education

Below High School, Graduated College, Graduated Masters

Grant Applications and Reviews Module for Funders

Alongside the latest release of Amp Impact, a new extension package has been created to expedite the setup of an environment to manage grant applications and reviews for funders. The package includes common configuration that funders can use to create calls for proposals, review proposals, and track grants that receive funding. The package also includes templates for automation and page layouts that can be used as a starting point for building a grant management system.

Admin Note:

The Grant Applications and Reviews Module is an extension package that sits outside of the main Amp package, i.e. there is a separate installation link that must be used to enable this functionality. For full details on how to install and use this functionality, see the Grant Applications and Reviews Module Setup Guide.

Feature Enhancements

Submissions: New response types (Short Text, Date) supported

When creating a template, users can now add both short text and date questions to the submission form using the Submission Template Builder. In the Add New Question popup, in the Response Type field, two new picklist values (Short Text, Date) will be available as an option.

When Short Text is selected as the Response Type and a Submission Response is created from the template, the responding user will now see a text input field for that question in the Submission Response Form.

Define a high level objective of programme in one sentence i

Improve educational outcomes of students in grades 9 and 10 through deployment of edutech

When Date is selected as the Response Type and a Submission Response is created from the template, the responding user will be able to use a date picker for that question in the Submission Response Form.

Submission

Program Assessment 2020

Program Background

As needed, please break down any primary goal into secondary goals.

*Date of Program Completion

*Describe the primary goal(s) of the program.

Salesforce Sans ▾ 12 ▾ **B** *I*

◀
July
▶
2020 ▾

Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

Today

Admin Note:

If upgrading from a previous version of Amp Impact, additional setup is required to enable these new Response Types. Refer to the Delphinus Upgrade Instructions for full details.

Submissions: Updated display of picklist and multi-select picklist responses in downloaded Word document

Previously, when downloading a Submission Response as a Word document, if any selection had been made in either a picklist or a multi-select picklist answer, then only the selected value(s) would print into the downloaded Word document. This could be challenging when working offline, as users cannot know what the other available options are.

This functionality has been updated such that when downloading a Submission Response as a Word document, if any selection has been made in either a picklist or a multi-select picklist answer, then all picklist values are printed into the document, and the selected picklist value(s) are bolded.

Report for 2020

Generated by: Angela Burns 5/07/2020 10:55 PM

Section 1

The below questions pertain to service providers working with the beneficiaries

* **Q1 Where are the service providers located?**

Select all the regions where service providers operate

Bangladesh

Nepal

Pakistan

China

* **Q2 Where will the programme be operational in 2020?**

Rate the service provider

Bad

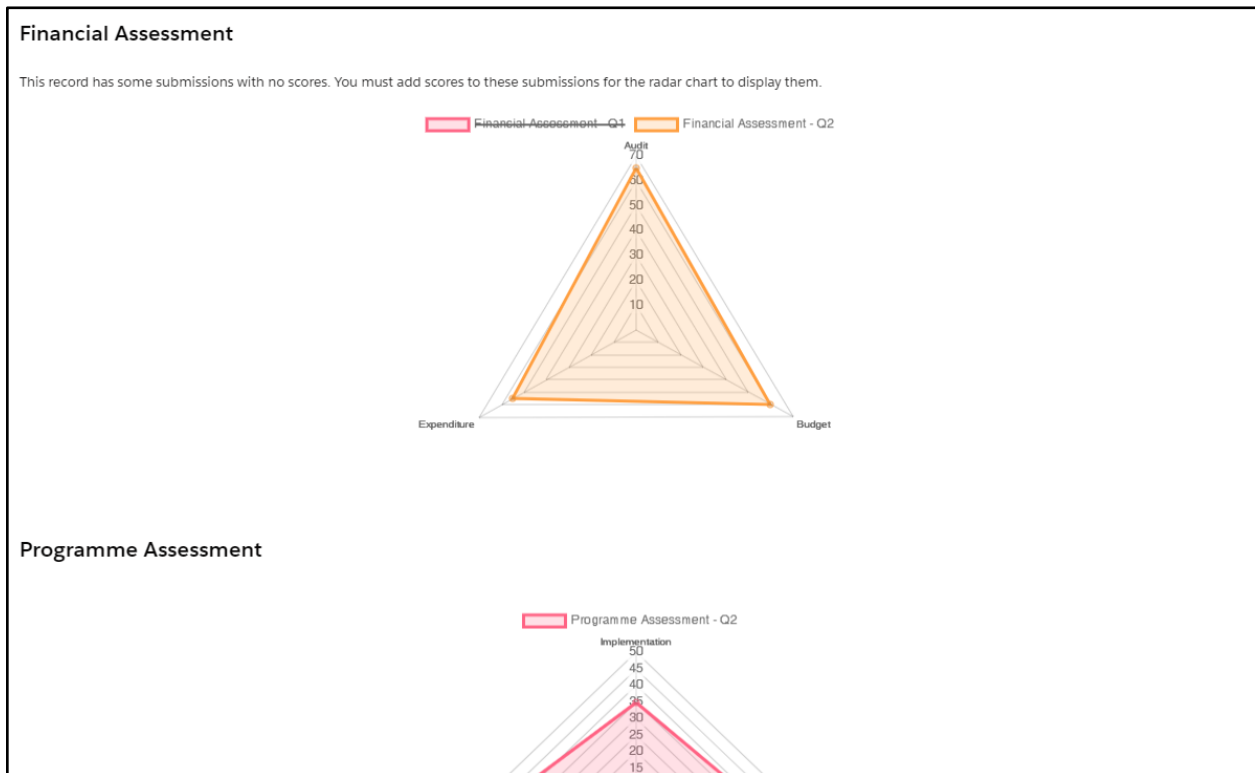
Average

Good

Best

Submissions Radar Charts: Headers added to provide additional context if multiple templates are related to a parent record

Previously, if multiple Submissions from different templates displayed in the Submission Radar Chart, they would display in a column without any labelling except for the color coding used within each radar chart. As this could be confusing for a user, there will now be a header displayed for each radar chart that prints the Description field of the Template related to each chart.



Control the field displayed in custom lookups in Amp Components using custom metadata type

A bug in previous releases prevented custom lookups from being added to the popups on Manage Framework. In addition to fixing this bug, the new release also enables system administrators to define the field displayed in the dropdown for lookups using a new custom metadata type. This allows for the custom display of fields in lookup dialogs in the component.

This flexibility has been applied to the following three components:

- Manage Framework
- Manage Indicators (Lightning Web Component)
- Financial Download / Upload

Set Targets/Add Results: Prevent overwriting existing values in Target To Date and Result To Date with NULL

In earlier releases, for any value manually entered into Target To Date or Result To Date fields for a percent Project Indicator (that is associated to multiple Project Indicator Geographic Areas and has a child Disaggregated Project Indicator), it would get overwritten to NULL due to triggers on the Result object. This would result in the Logframes table displaying NULL values in the Target To Date and Result To Date fields.

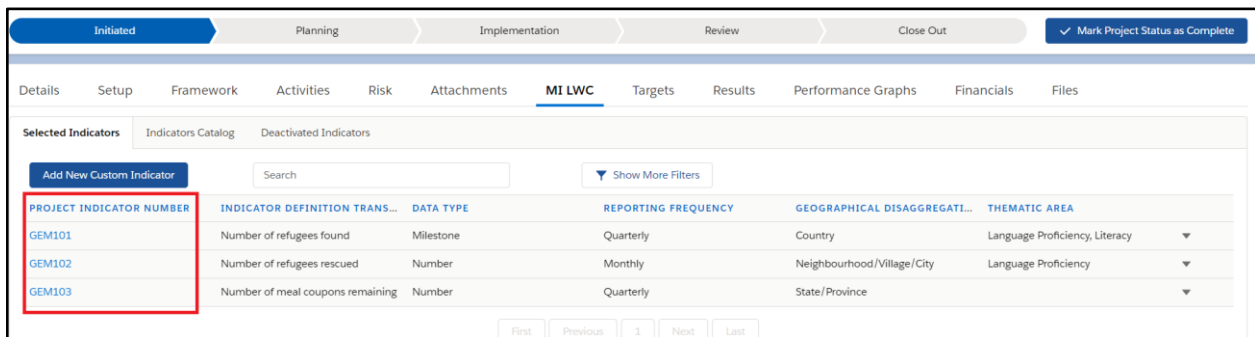
This has been updated such that if the user manually enters the values in the Target To Date and Result To Date fields through the Project Indicator record page, then inputting values on Set Targets and Add Results page will not overwrite previously saved values. The Logframe table does not display NULL values in Target to Date and Result To Date fields if the user manually enters values against a percent Project

Indicator (matching the above mentioned criteria) on Set Targets and Add Results pages or from Project Indicator record page.

Manage Indicators: Add any field to display in the first column of Selected Indicators table

Previously, the Indicator Definition field was hardcoded to display as the first column of the Selected Indicators table on ManageIndicators visualforce page.

This has been updated such that any field that is dropped first on the fieldset for Selected Indicators table can dynamically display in the first column of the table. Values in this field will always be displayed as hyperlinks to the Project Indicator record page.

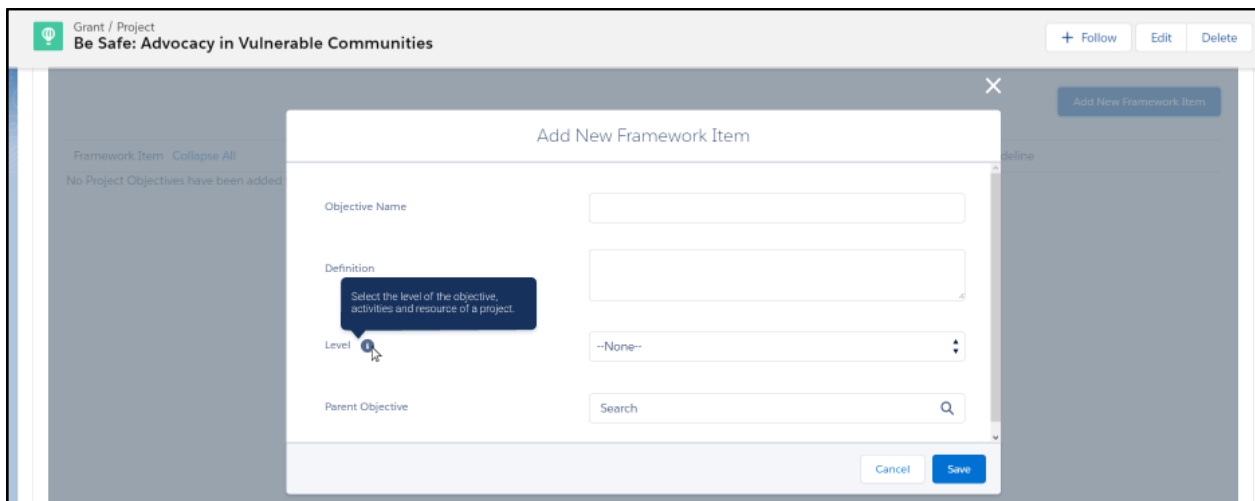


PROJECT INDICATOR NUMBER	INDICATOR DEFINITION TRANS...	DATA TYPE	REPORTING FREQUENCY	GEOGRAPHICAL DISAGGREGATI...	THEMATIC AREA
GEM101	Number of refugees found	Milestone	Quarterly	Country	Language Proficiency, Literacy
GEM102	Number of refugees rescued	Number	Monthly	Neighbourhood/Village/City	Language Proficiency
GEM103	Number of meal coupons remaining	Number	Quarterly	State/Province	

Frameworks: View help text when adding/editing objectives to a framework

In earlier releases, any help text that was added to a field on Catalog Objective or Project Objective would not be accessible in the Add New Framework Item or Edit Framework Item popups in Manage Frameworks.

This has been updated such that help text is visible in these popups through a popover.



Grant / Project
Be Safe: Advocacy in Vulnerable Communities

+ Follow Edit Delete

Add New Framework Item

Objective Name

Definition

Level
 Select the level of the objective, activities and resource of a project.

Parent Objective

Cancel Save

Default values for indicator stoplight thresholds

Prior to this release, indicator stoplights were enabled by default in the custom settings, but users would still have to manually populate the threshold fields for them to display on the Add Results page.

This has been updated such that the default value for the Red/Yellow Threshold is 75% and the default value for the Yellow/Green Threshold is 100%.

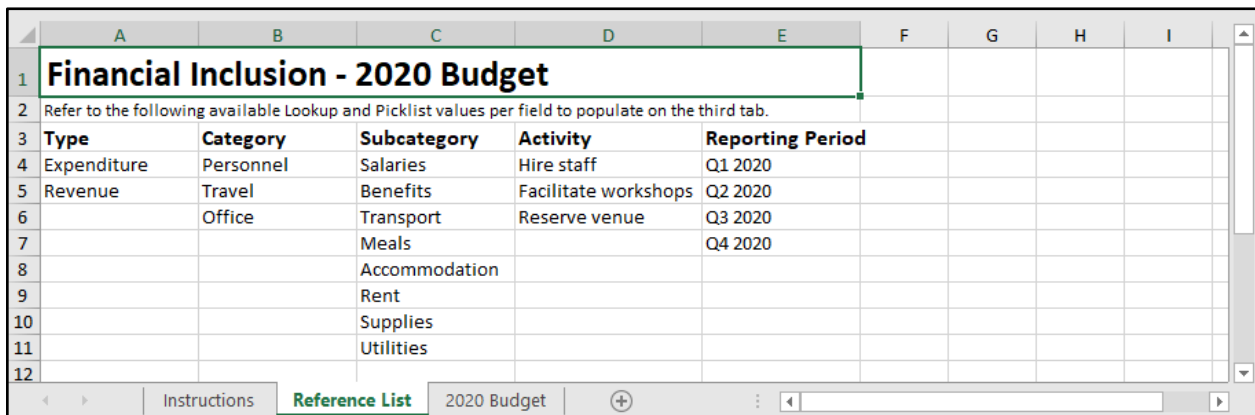
Admin Note:

Default field values in Amp cannot be directly edited. If the default values should be different than the packaged defaults, these can be modified using custom automation.

Financial Download: New “Reference List” tab to validate picklist and relationship data

In earlier releases, when downloading and uploading Financial records via Excel Upload onto either a Budget or a Reporting Period, there would be no guidance for the user on how to populate either picklist or relationship fields. The user would have to manually enter this data into the Excel with no reference to what were the valid values for picklist or relationship fields, leaving room for user error with typos.

This has been updated such that when a Budget or Reporting Period’s Financials are downloaded via Excel Download, a new tab “Reference List” is included in the Excel, providing lists of the valid values that can be entered into each picklist or relationships field that is included as a column in the Excel file.



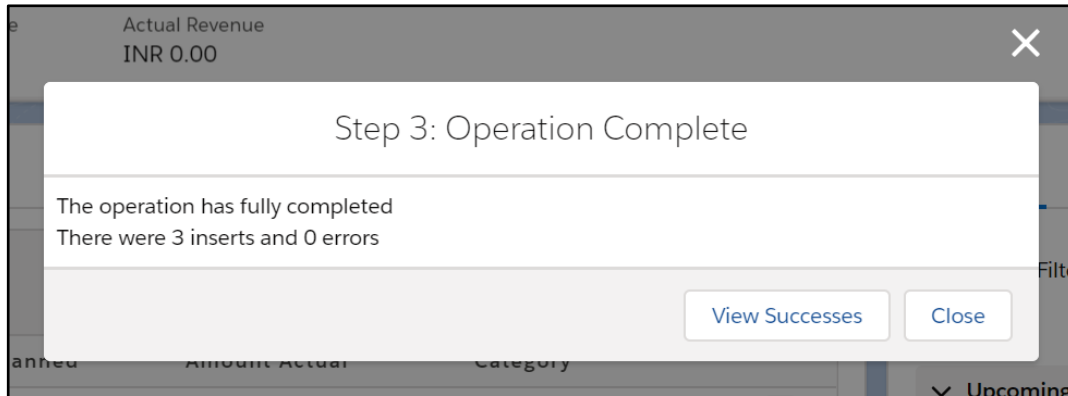
The screenshot shows an Excel spreadsheet with the following data:

Type	Category	Subcategory	Activity	Reporting Period
Expenditure	Personnel	Salaries	Hire staff	Q1 2020
Revenue	Travel	Benefits	Facilitate workshops	Q2 2020
	Office	Transport	Reserve venue	Q3 2020
		Meals		Q4 2020
		Accommodation		
		Rent		
		Supplies		
		Utilities		

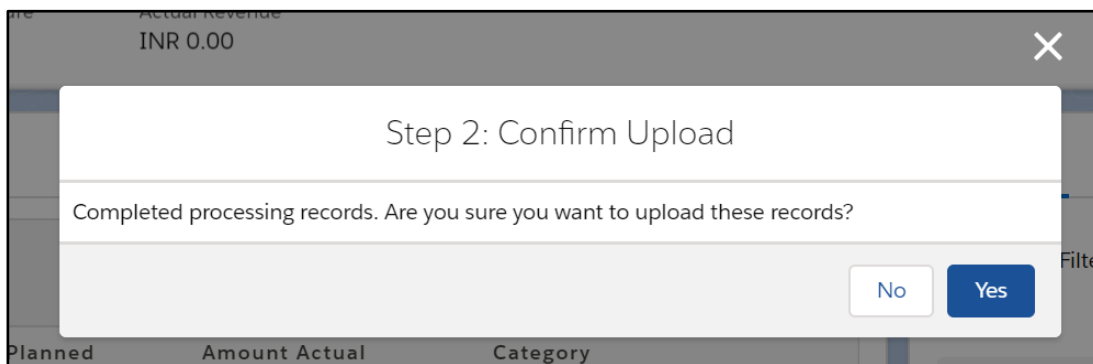
The spreadsheet also includes a title bar for the 'Reference List' tab and a note in row 2: 'Refer to the following available Lookup and Picklist values per field to populate on the third tab.'

Financial Upload: Closing the final popup automatically refreshes the record page

Previously, when uploading Financial records via Excel Upload onto either a Budget or a Reporting Period, the record page would only refresh if the user exited the final popup by clicking the “Close” button. If a user exited the final popup by clicking the “X”, the record page would not refresh to reflect the newly created or updated Financials.



This has been updated such that, as soon as the user confirms the upload by clicking “Yes”, the record page will refresh and display the updated child Financial records.

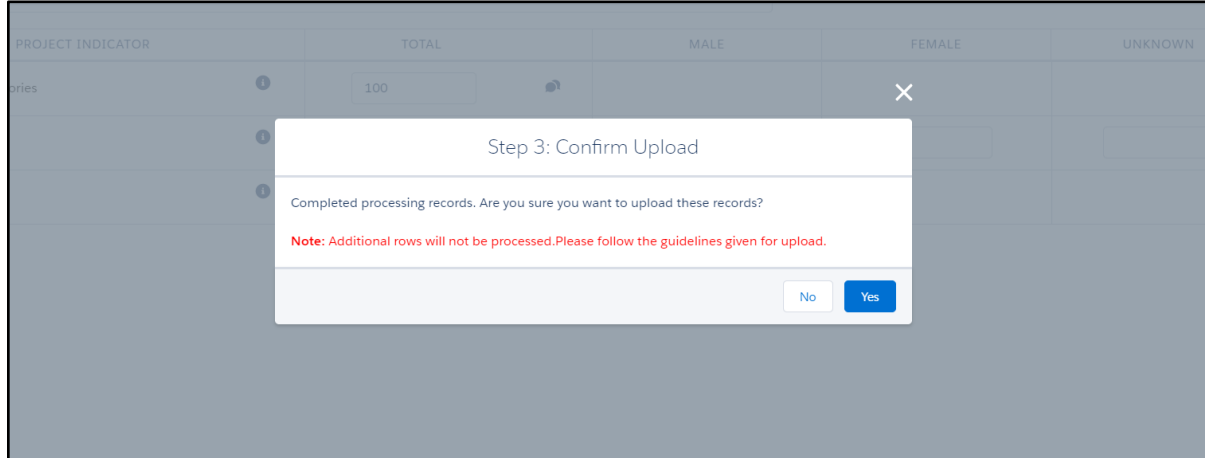


Resolved Issues

Set Targets/Add Results: Excel Upload does not fail if new row added

Previously, when uploading targets or results using the Excel Upload feature on Set Targets or Add Results, the entire upload would fail, if a new row was added either right under the column header row (Row 3) or at the bottom of the file. If a row was added in either place, then the upload would time out, and the user would get no error messaging to indicate why the upload failed.

With this update, the user can now successfully progress through the popups for Excel Upload, even if they add a row in the file. In the final confirmation popup, the user will now see an error message if they have added rows, notifying them that the additional rows will not be processed.



Disbursements: Error handling clears from popups when creating or editing another disbursement

In earlier releases, any error handling that rendered on a popup on the Disbursements Visualforce page would reappear when another popup was opened, even if all the values (and therefore the error) was cleared from the popup.

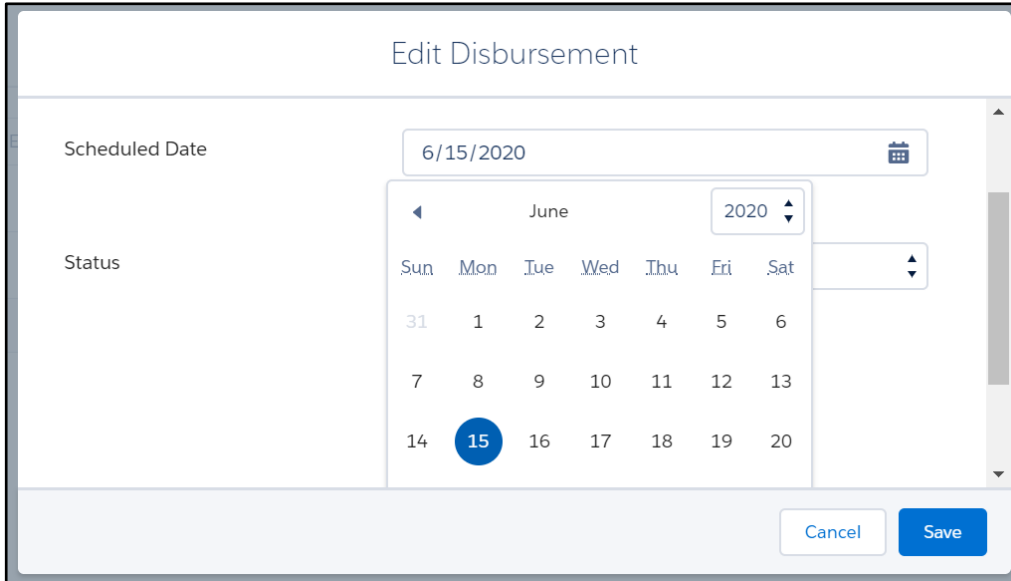
This has now been resolved so that any error message clears with the reload of a popup, thereby creating a less confusing user experience.

Disbursements: Date picker in Add / Edit Disbursement popups clears / retains values as expected

Prior to this release, date pickers in the popups on the Disbursements Visualforce page behaved unexpectedly:

- Add Disbursement popup: When a user selected a date in the date picker, closed the popup without saving, and then reopened the popup, the previously selected date still displayed as highlighted in the date picker (but not in the field). When the highlighted date was clicked in the date picker to display it in the field and then the user saved the record, it saved as a NULL value.
- Edit Disbursement popup: When a user clicked on the calendar icon for a date field, the date picker would open without highlighting the value saved in the field.

This has now been updated such that in both popups, the date picker behaves as expected, which means the highlighted date and field default value is today for the Add Disbursement popup and the previously saved value for the Edit Disbursement popup.



Edit Disbursement

Scheduled Date: 6/15/2020

Status: [Dropdown]

Calendar: June 2020

Sun	Mon	Tue	Wed	Thu	Fri	Sat
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20

Buttons: Cancel, Save

Automation: Removed requirement for IATI field access to create new Project Geographic Area

Previously, users were prevented from creating a new Project Geographic Area record if they did not have access to the Exclude From IATI field on Project Geographic Area. This is because the After Insert trigger on Project Geographic Area would try to populate that field, even if IATI was not being used in the system.

This has been updated such that the trigger does not update the field and the Project Geographic Areas can be created without any involvement of the IATI feature.

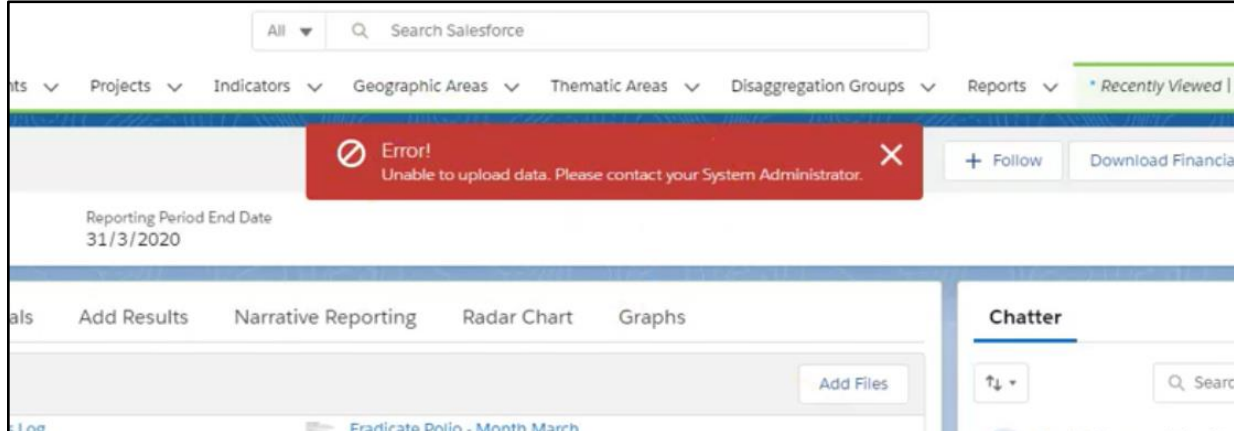
Financials: Custom fields supported in Excel download / upload

In previous releases, when a custom field would be added to any of the field sets for the Excel columns for Financial download/upload, the user would receive an error message and the download would fail.

This has been resolved such that custom fields can be added to the Excel column field sets and the Financials Excel file will download successfully for the user.

Financials: Formula fields supported in Excel download / upload

In previous releases, when a formula field would be added to any of the field sets for the Excel columns for Financial download/upload, the user would receive an error message when attempting to upload Financial records notifying them that the entire upload failed.



This has been fixed such that the upload succeeds, even if formula fields are included in the Excel.

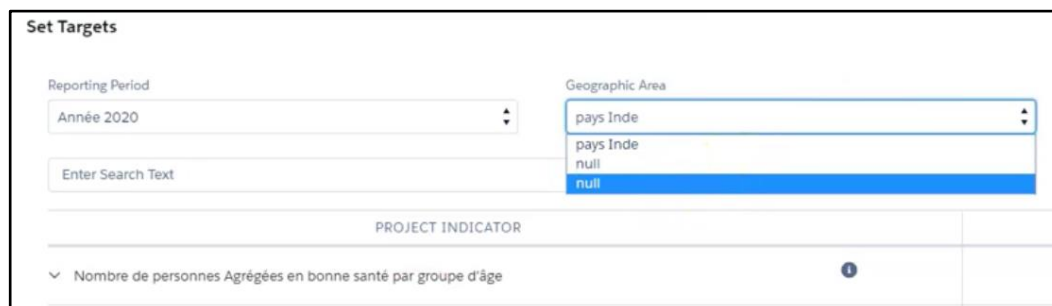
Financial: Downloaded Excel opens regardless of the number of picklist values

In previous releases, the downloaded Financial Excel file would open corrupted when there were more than 10 total values in picklist fields on the Financial object, and that picklist field was added to the `ampi__BUDGET_EXCEL_COLUMNS` or `ampi__REPORT_EXCEL_COLUMNS` field set.

This has been resolved such that the downloaded Excel file opens uncorrupted regardless of the total number of values in picklist fields on the Financial object.

Multiple Languages: If a language field is not populated, the translation formula field will return the default language field

With the introduction of multiple languages in the last release, if a particular language field was not populated, then the interfaces would display a blank value for the user in that particular language context. For example, a system has one Spanish User and one French User, and `USER_LANGUAGE_CODE` has been translated in Spanish as '1' and in French as '2'. Now, if the field value of `ampi__Geographical_Area__c.ampi__Name_Language_1__c` is provided in Spanish while `ampi__Geographical_Area__c.ampi__Name_Language_2__c` is left blank, then, on the Set Targets page, the Spanish User will view the Geographic Area Name in Spanish, while the French User will see a NULL value in the Geographic Area dropdown.



Two updates have been made such that blank values are not displayed in the interfaces for a user if the language field for that user's language context is left NULL:

1. For Text and TextArea fields that support multiple languages, the formula that prints a value based on the user's language context will print the default value. The formula field can be dropped into field sets and page layouts, and it will display according to the user's language context.
2. For LongTextArea fields that support multiple languages, if the default language field is included in the related field set, the interface itself will directly print the default value.

ⓘ Admin Note:

This update opens the possibility for users to see Amp in both, default and user-specific languages at the same time. It is still recommended that all language fields are populated for every language supported by the system.

Automation: Updated triggers generating Disaggregated Project Indicators to fire consistently

With the updates to triggers to create Disaggregated Project Indicator records in previous releases when the Disaggregation Group field is populated on Project Indicator through native Salesforce, an inconsistency caused the triggers to sometimes create multiple junction records for a particular Project Indicator and sometimes to create no junction records for a particular Project Indicator.

This has been fixed such that the trigger fires correctly and only generates a single child Disaggregated Project Indicator record for any particular Project Indicator record when a user populated Disaggregation Group through native Salesforce.

Manage Indicators: Default values are not cleared in Add New Indicator popup

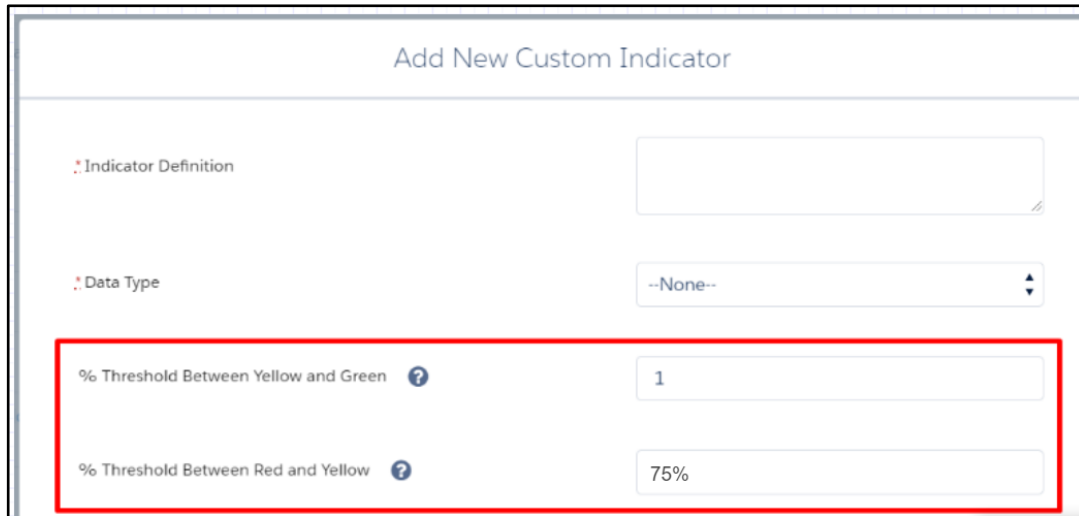
In earlier versions of Amp Impact, the default value of a field would not populate in the Add New Indicator popup, and instead a blank field would display, despite any default values set. All default values had to be hard-coded directly into the interface.

This has been updated such that default values defined at the field level are automatically printed into the fields in the Add New Indicator popup. This creates a consistency between what a System Administrator defines and what a user sees.

Manage Indicators: Default values for percent field type on Indicator__c display correctly in Add New Custom Indicator popup

Previously, an incorrect default value would display for percent field on `ampi__Indicator__c`. For example, if the default value for percent field `ampi_Red_Yellow_Threshold__c` was set to 0.75, it would display as 0.75 instead of 75% in the Add New Custom Indicator popup.

This has been resolved so that the correct value displays as a percentage (75%) instead of a decimal value (0.75).



Add New Custom Indicator

Indicator Definition

Data Type

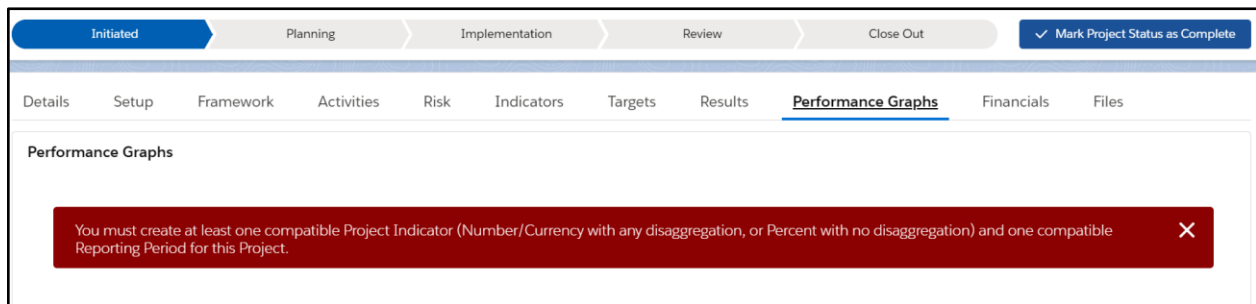
% Threshold Between Yellow and Green

% Threshold Between Red and Yellow

Performance Graphs: Improved error handling when percent Project Indicator is related to a Disaggregation Group

Previously, an inaccurate error handling would display if a project consisted of only one Project Indicator which was of percent data type and was related to a Disaggregation Group. The error handling incorrectly stated “You must create one Project Indicator and one Reporting Period for this project”.

The text in error handling has been updated to accurately inform the user. The error handling message states “You must create at least one compatible Project Indicator (Number/Currency with any disaggregation, or Percent with no disaggregation) and one compatible Reporting Period for this Project.”



Initiated Planning Implementation Review Close Out

Details Setup Framework Activities Risk Indicators Targets Results Performance Graphs Financials Files

Performance Graphs

You must create at least one compatible Project Indicator (Number/Currency with any disaggregation, or Percent with no disaggregation) and one compatible Reporting Period for this Project.

Submissions: Qualitative responses are no longer cut off in Word download

Previously, if a qualitative response exceeded 20,000 characters and the Submission was downloaded, the Word document would print the qualitative response such that the right edge of the text would be cut off (see below).



Generated by: Community User 11/2/2019 11:32 PM

Section #1
 Insert Instructions Here

* **Mockaroo Q#21**
Insert instructions here

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This has now been resolved such that qualitative responses are no longer cut off, and this is irrespective of the number of characters in the response.

Submissions: Radar charts display error handling instead of not rendering

For certain scenarios, the Submission Radar Chart component would fail to render without any error message, causing a confusing user experience. This error would occur in the following scenarios, in which a Submission would have:

1. One scored Question and no defined Section
2. Multiple scored Questions and no defined Section
3. Multiple scored Questions and multiple unscored Sections

This has now been resolved such that the component will provide error handling to the user to explain why the radar chart is not displaying.

Packaging Changes

New ampi__Modification__c object

1. New fields:

Field Label	Field API Name	Data Type
Name	Name	Text(80)
Project	ampi__Project__c	Lookup(Project)

Proposed New End Date	ampi__Proposed_New_End_Date__c	Date
Rationale	ampi__Rationale__c	Rich Text Area(32768)
Reviewer Comments	ampi__Reviewer_Comments__c	Rich Text Area(32768)
Status	ampi__Status__c	Picklist
Summary of Modification	ampi__Summary_Of_Modification__c	Rich Text Area(32768)
Type	ampi__Type__c	Picklist

2. New page layout: Modification Layout

Changes to ampi__Project__c

1. Updated page layout Project Layout:
 - a. Related list for ampi__Modification__c added
2. Updated Lightning Record Page
 - a. Single Related List component for ampi__Modification__c added to the Setup tab
3. Field updates:

The following translation formula field has an updated formula to return the default language value in case the specific language value is left NULL (per [this update](#)):

Field API Name	Original Formula	New Formula
ampi__Name_Translated__c	CASE(\$Label.ampi__user_language_code , '1', ampi__Name_Language_1__c , '2', ampi__Name_Language_2__c , '3', ampi__Name_Language_3__c , Name))	CASE(\$Label.ampi__user_language_code, '1', BLANKVALUE(ampi__Name_Language_1__c, Name), '2', BLANKVALUE(ampi__Name_Language_2__c, Name), '3', BLANKVALUE(ampi__Name_Language_3__c, Name), Name)

Changes to ampi__Indicator__c

Default values have been set for the following fields on ampi__Indicator__c:

Field API Name	Data Type	New Default Value
ampi__Red_Yellow_Threshold__c	Percent	75
ampi__Yellow_Green_Threshold__c	Percent	100

The following translation formula fields have updated formulas to return the default language value in case the specific language value is left NULL (per [this update](#)):

Field API Name	Original Formula	New Formula
ampi__Description_Translated__c	CASE(\$Label.ampi__user_language_code , '1', ampi__Description_Language_1__c , '2', ampi__Description_Language_2__c , '3', ampi__Description_Language_3__c , ampi__Description__c)	CASE(\$Label.ampi__user_language_code, '1', BLANKVALUE(ampi__Description_Language_1__c, ampi__Description__c), '2', BLANKVALUE(ampi__Description_Language_2__c, ampi__Description__c), '3', BLANKVALUE(ampi__Description_Language_3__c, ampi__Description__c), ampi__Description__c)
ampi__Disaggregation_Group_Translated__c	CASE(\$Label.ampi__user_language_code , '1', ampi__Disaggregation_Group_Language_1__c , '2', ampi__Disaggregation_Group_Language_2__c , '3', ampi__Disaggregation_Group_Language_3__c , ampi__Disaggregation_Group__c)	CASE(\$Label.ampi__user_language_code, '1', BLANKVALUE(ampi__Disaggregation_Group_Language_1__c, ampi__Disaggregation_Group__c), '2', BLANKVALUE(ampi__Disaggregation_Group_Language_2__c, ampi__Disaggregation_Group__c), '3', BLANKVALUE(ampi__Disaggregation_Group_Language_3__c,)

		ampi__Disaggregation_Group__c), ampi__Disaggregation_Group__c)
ampi__Units_Translated__c	CASE(\$Label.ampi__user_language_code , '1', ampi__Units_Language_1__c , '2', ampi__Units_Language_2__c , '3', ampi__Units_Language_3__c , ampi__Units__c)	CASE(\$Label.ampi__user_language _code, '1', BLANKVALUE(ampi__Units_Langua ge_1__c, ampi__Units__c), '2', BLANKVALUE(ampi__Units_Langua ge_2__c, ampi__Units__c), '3', BLANKVALUE(ampi__Units_Langua ge_3__c, ampi__Units__c), ampi__Units__c)

Due to the increased flexibility in the display of the Manage Indicators Visualforce page and Lightning Web Component, the following field sets¹ have the following changes:

Field Set API Name	Update(s)
ampi__CATALOG_INDICATORS_TABLE	ampi__Description_Translated__c added to the field set

Changes to ampi__Project_Indicator__c

Help text has been added for the following formula(text) field fields on ampi__Project_Indicator__c:

Field API Name	Help Text
ampi__Aim_Icon__c	Aim is set on the parent catalog indicator.
ampi__Aim__c	Aim is set on the parent catalog indicator.
ampi__Data_Type_Icon__c	Data Type is set on the parent catalog indicator.
ampi__Data_Type__c	Data Type is set on the parent catalog indicator.

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. See the Upgrade Instructions for any mandatory updates to field sets.

ampi__External_Code__c	External Code is set on the parent catalog indicator.
ampi__Indicator_Code__c	Indicator Code is set on the parent catalog indicator.
ampi__Indicator_Level__c	Indicator Level is set on the parent catalog indicator.
ampi__Reporting_Currency__c	Reporting Currency is set on the parent catalog indicator.
ampi__Type__c	Type is set on the parent catalog indicator.

Character limits have been updated for the following fields on ampi__Project_Indicator__c:

Field API Name	Data Type	Original Character Limit	New Character Limit
ampi__Geographic_Area_Text__c	Long Text Area	500	5000
ampi__Geographic_Area_Text_Language_1__c	Long Text Area	500	5000
ampi__Geographic_Area_Text_Language_2__c	Long Text Area	500	5000
ampi__Geographic_Area_Text_Language_3__c	Long Text Area	500	5000
ampi__Objective__c	Long Text Area	500	5000
ampi__Objective_Language_1__c	Long Text Area	500	5000
ampi__Objective_Language_2__c	Long Text Area	500	5000
ampi__Objective_Language_3__c	Long Text Area	500	5000
ampi__Reporting_Period_Text__c	Long Text Area	500	7500
ampi__Reporting_Period_Text_Language_1__c	Long Text Area	500	7500
ampi__Reporting_Period_Text_Language_2__c	Long Text Area	500	7500
ampi__Reporting_Period_Text_Language_3__c	Long Text Area	500	7500
ampi__Thematic_Area_Icon__c	Long Text Area	500	5000
ampi__Thematic_Area_Ids__c	Long Text Area	500	5000
ampi__Thematic_Area_Text__c	Long Text Area	500	5000
ampi__Thematic_Area_Text_Language_1__c	Long Text Area	500	5000
ampi__Thematic_Area_Text_Language_2__c	Long Text Area	500	5000

ampi__Thematic_Area_Text_Language_3__c	Long Text Area	500	5000
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Default values have been set for the following fields on ampi__Project_Indicator__c (as per [this update](#)):

Field API Name	Data Type	New Default Value
ampi__Red_Yellow_Threshold__c	Percent	75
ampi__Yellow_Green_Threshold__c	Percent	100

The following translation formula fields have updated formulas to return the default language value in case the specific language value is left NULL (per [this update](#)):

Field API Name	Original Formula	New Formula
ampi__Description_Translated__c	CASE(\$Label.ampi__user_language_code , '1', ampi__Description_Language_1__c , '2', ampi__Description_Language_2__c , '3', ampi__Description_Language_3__c , ampi__Description__c)	CASE(\$Label.ampi__user_language_code, '1', BLANKVALUE(ampi__Description_Language_1__c, ampi__Description__c), '2', BLANKVALUE(ampi__Description_Language_2__c, ampi__Description__c), '3', BLANKVALUE(ampi__Description_Language_3__c, ampi__Description__c), ampi__Description__c)
ampi__Disaggregation_Group_Translated__c	CASE(\$Label.ampi__user_language_code , '1', ampi__Disaggregation_Group_Language_1__c , '2', ampi__Disaggregation_Group_Language_2__c , '3', ampi__Disaggregation_Group_Language_3__c , ampi__Disaggregation_Group__c)	CASE(\$Label.ampi__user_language_code, '1', BLANKVALUE(ampi__Disaggregation_Group_Language_1__c, ampi__Disaggregation_Group__c), '2', BLANKVALUE(ampi__Disaggregation_Group_Language_2__c, ampi__Disaggregation_Group__c), '3', BLANKVALUE(ampi__Disaggregation_Group_Language_3__c,)

		ampi__Disaggregation_Group__c), ampi__Disaggregation_Group__c)
ampi__Units_Translated__c	CASE(\$Label.ampi__user_language_code , '1', ampi__Units_Language_1__c , '2', ampi__Units_Language_2__c , '3', ampi__Units_Language_3__c , ampi__Units__c)	CASE(\$Label.ampi__user_language _code, '1', BLANKVALUE(ampi__Units_Langua ge_1__c, ampi__Units__c), '2', BLANKVALUE(ampi__Units_Langua ge_2__c, ampi__Units__c), '3', BLANKVALUE(ampi__Units_Langua ge_3__c, ampi__Units__c), ampi__Units__c)

Due to the increased flexibility in the display of the Manage Indicators Visualforce page and Lightning Web Component, the following field sets² have the following changes:

Field Set API Name	Update(s)
ampi__SELECTED_PROJECT_INDICATORS_TABLE	ampi__Description_Translated__c added to the field set
ampi__DEACTIVATED_PROJECT_INDICATORS_TABLE	ampi__Description_Translated__c added to the field set

Changes to ampi__Catalog_Objective__c

The following translation formula fields have updated formulas to return the default language value in case the specific language value is left NULL (per [this update](#)):

Field API Name	Original Formula	New Formula
ampi__Definition_Translated__c	CASE(\$Label.ampi__user_language_co de ,	CASE(\$Label.ampi__user_langua ge_code, '1',

² 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. See the Upgrade Instructions for any mandatory updates to field sets.

	'1', ampi__Definition_Language_1__ c , '2', ampi__Definition_Language_2__ c , '3', ampi__Definition_Language_3__ c , ampi__Definition__c)	BLANKVALUE(ampi__Definition_ Language_1__c, ampi__Definition__c), '2', BLANKVALUE(ampi__Definition_ Language_2__c, ampi__Definition__c), '3', BLANKVALUE(ampi__Definition_ Language_3__c, ampi__Definition__c), ampi__Definition)
ampi__Name_Translated__c	CASE(\$Label.ampi__user_language_co de , '1', ampi__Name_Language_1__c , '2', ampi__Name_Language_2__c , '3', ampi__Name_Language_3__c , Name)	CASE(\$Label.ampi__user_langua ge_code, '1', BLANKVALUE(ampi__Name_Lan guage_1__c, Name), '2', BLANKVALUE(ampi__Name_Lan guage_2__c, Name), '3', BLANKVALUE(ampi__Name_Lan guage_3__c, Name), Name)

Changes to ampi__Disaggregation_Group__c

The following translation formula field has an updated formula to return the default language value in case the specific language value is left NULL (per [this update](#)):

Field API Name	Original Formula	New Formula
ampi__Name_Translated__c	CASE(\$Label.ampi__user_language_co de , '1', ampi__Name_Language_1__c , '2', ampi__Name_Language_2__c , '3', ampi__Name_Language_3__c , Name)	CASE(\$Label.ampi__user_langua ge_code, '1', BLANKVALUE(ampi__Name_Lan guage_1__c, Name), '2', BLANKVALUE(ampi__Name_Lan guage_2__c, Name), '3', BLANKVALUE(ampi__Name_Lan

		guage_3__c, Name), Name)
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Changes to `ampi__Disaggregation_Value__c`

The following translation formula field has an updated formula to return the default language value in case the specific language value is left NULL (per [this update](#)):

Field API Name	Original Formula	New Formula
<code>ampi__Name_Translated__c</code>	CASE(\$Label.ampi__user_language_code , '1', ampi__Name_Language_1__c , '2', ampi__Name_Language_2__c , '3', ampi__Name_Language_3__c , Name)	CASE(\$Label.ampi__user_language_code, '1', BLANKVALUE(ampi__Name_Language_1__c, Name), '2', BLANKVALUE(ampi__Name_Language_2__c, Name), '3', BLANKVALUE(ampi__Name_Language_3__c, Name), Name)

Changes to `ampi__Geographical_Area__c`

The following translation formula field has an updated formula to return the default language value in case the specific language value is left NULL (per [this update](#)):

Field API Name	Original Formula	New Formula
<code>ampi__Name_Translated__c</code>	CASE(\$Label.ampi__user_language_code , '1', ampi__Name_Language_1__c , '2', ampi__Name_Language_2__c , '3', ampi__Name_Language_3__c , Name)	CASE(\$Label.ampi__user_language_code, '1', BLANKVALUE(ampi__Name_Language_1__c, Name), '2', BLANKVALUE(ampi__Name_Language_2__c, Name), '3', BLANKVALUE(ampi__Name_Language_3__c, Name), Name)

Changes to `ampi__Objective__c`

The following translation formula field has an updated formula to return the default language value in case the specific language value is left NULL (per [this update](#)):

Field API Name	Original Formula	New Formula
<code>ampi__Label_Translated__c</code>	<pre> CASE(\$Label.ampi__user_language_code, '1', ampi__Label_Language_1__c , '2', ampi__Label_Language_2__c , '3', ampi__Label_Language_3__c , ampi__Label__c) </pre>	<pre> CASE(\$Label.ampi__user_language_code, '1', BLANKVALUE(ampi__Label_Language_1__c, ampi__Label__c), '2', BLANKVALUE(ampi__Label_Language_2__c, ampi__Label__c), '3', BLANKVALUE(ampi__Label_Language_3__c, ampi__Label__c), ampi__Label__c) </pre>

Changes to `ampi__Reporting_Period__c`

The following translation formula field has an updated formula to return the default language value in case the specific language value is left NULL (per [this update](#)):

Field API Name	Original Formula	New Formula
<code>ampi__Label_Translated__c</code>	<pre> CASE(\$Label.ampi__user_language_code, '1', ampi__Label_Language_1__c , '2', ampi__Label_Language_2__c , '3', ampi__Label_Language_3__c , ampi__Label__c) </pre>	<pre> CASE(\$Label.ampi__user_language_code, '1', BLANKVALUE(ampi__Label_Language_1__c, ampi__Label__c), '2', BLANKVALUE(ampi__Label_Language_2__c, ampi__Label__c), '3', BLANKVALUE(ampi__Label_Language_3__c, ampi__Label__c), ampi__Label__c) </pre>

Changes to amp__Question__c

New fields:

Field Label	Field API Name	Data Type
Date Response	amp__Date_Response__c	Date
Short Text Response	amp__Short_Text_Response__c	Text(255)

Changes to amp__Thematic_Area__c

The following translation formula field has an updated formula to return the default language value in case the specific language value is left NULL (per [this update](#)):

Field API Name	Original Formula	New Formula
amp__Name_Translated__c	CASE(\$Label.amp__user_language_code , '1', amp__Name_Language_1__c , '2', amp__Name_Language_2__c , '3', amp__Name_Language_3__c , Name) 	CASE(\$Label.amp__user_language_code, '1', BLANKVALUE(amp__Name_Language_1__c, Name), '2', BLANKVALUE(amp__Name_Language_2__c, Name), '3', BLANKVALUE(amp__Name_Language_3__c, Name), Name)

Declarative Automation

Process Builder

The new process amp__Copy_Indicator_Field_Values_Onto_Project_Indicator has been created. This process copies values entered into fields on the parent amp__Indicator__c record into the fields of the child amp__Project_Indicator__c record when that record is created. By default, the following fields are copied:

- amp__Active__c
- amp__Calculate_Total__c
- amp__Cross_Disaggregation_By_Sex__c
- amp__Cumulative__c
- amp__Data_Source_Language_1__c
- amp__Data_Source_Language_2__c
- amp__Data_Source_Language_3__c
- amp__Data_Source__c
- amp__Indicator_Definition_Language_1__c
- amp__Indicator_Definition_Language_2__c
- amp__Indicator_Definition_Language_3__c
- amp__Indicator_Definition__c
- amp__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. See the Installation Guide for more guidance on customization.

Permission Sets

1. Amp Impact Admin

Field API Name	Object(s)	Permission
ampi__Date_Response__c	ampi__Question__c	Read, Edit
ampi__Short_Text_Response__c	ampi__Question__c	Read, Edit
Name	ampi__Modification__c	Read, Edit
ampi__Project__c	ampi__Modification__c	Read, Edit
ampi__Proposed_New_End_Date__c	ampi__Modification__c	Read, Edit
ampi__Rationale__c	ampi__Modification__c	Read, Edit
ampi__Reviewer_Comments__c	ampi__Modification__c	Read, Edit
ampi__Status__c	ampi__Modification__c	Read, Edit
ampi__Summary_Of_Modification__c	ampi__Modification__c	Read, Edit
ampi__Type__c	ampi__Modification__c	Read, Edit

2. Submission Response

Field API Name	Object(s)	Permission
ampi__Date_Response__c	ampi__Question__c	Read, Edit
ampi__Short_Text_Response__c	ampi__Question__c	Read, Edit

3. Submission Review

Field API Name	Object(s)	Permission
ampi__Date_Response__c	ampi__Question__c	Read
ampi__Short_Text_Response__c	ampi__Question__c	Read

Custom Metadata Types

New Custom Metadata Type Records

The custom metadata type records listed below are created on ampi__Object_Lookup_Label_Mapping__mdt (per [this update](#)):

1. Objective_Parent_Project_Objective
 - a. Child Object Name: ampi__Objective__c
 - b. Lookup Field Name: ampi__Parent_Project_Objective__c
 - c. Parent Object Name: ampi__Objective__c
 - d. Label Field API Name: ampi__Label_Translated__c
2. Financial_Reporting_Period
 - a. Child Object Name: ampi__Financial__c
 - b. Lookup Field Name: ampi__Reporting_Period__c
 - c. Parent Object Name: ampi__Reporting_Period__c
 - d. Label Field API Name: ampi__Label_Translated__c

Custom Labels

New Custom Labels

1. CORRECT_ERRORS
 - a. Value: "Please correct all errors before saving"
 - b. Function: Label for the error message that displays when the Add New Custom Indicator popup or the Customize Project Indicator popup are incorrectly populated on the rebuilt Manage Indicators page
2. DEACTIVATE
 - a. Value: "Deactivate"
 - b. Function: Label for action icon to deactivate project indicators from Selected Indicators table on the rebuilt Manage Indicators page
3. DEACTIVATED_INDICATOR_MESSAGE
 - a. Value: "Are you sure you want to deactivate this indicator?"
 - b. Function: Label for the message that displays in deactivate popup when user clicks on deactivate action icon on the rebuilt Manage Indicators page
4. FIRST_PAGE
 - a. Value: "First"

- b. Function: Label for the pagination buttons beneath the Selected Indicators, Indicator Catalog and Deactivated Indicators tables to navigate to the first page on the rebuilt Manage Indicators page
5. INVALID_NUMBER_FORMAT_MESSAGE
 - a. Value: "Invalid Number Format"
 - b. Function: Label for the error message that displays when an invalid input is entered in number filter field in dynamic search filter on the rebuilt Manage Indicators page
6. INVALID_DECIMAL_ERROR_MESSAGE_PT_1
 - a. Value: "Please enter upto"
 - b. Function: Label for the error message that displays when more than 4 decimal places are entered in number filter field in dynamic search filter on the rebuilt Manage Indicators page
7. INVALID_DECIMAL_ERROR_MESSAGE_PT_2
 - a. Value: "decimals"
 - b. Function: Label for the error message that displays when more than 4 decimal places are entered in number filter field in dynamic search filter on the rebuilt Manage Indicators page
8. INVALID_DECIMAL_ERROR_MESSAGE_PT_3
 - a. Value: "This field does not accept any decimals"
 - b. Function: Label for the error message that displays when number filter field is configured to not allow any decimal entries in dynamic search filter on the rebuilt Manage Indicators page
9. LAST_PAGE
 - a. Value: "Last"
 - b. Function: Label for the pagination buttons beneath the Selected Indicators, Indicator Catalog and Deactivated Indicators tables to navigate to the last page on the rebuilt Manage Indicators page
10. NEXT_PAGE
 - a. Value: "Next"
 - b. Function: Label for the pagination buttons beneath the Selected Indicators, Indicator Catalog and Deactivated Indicators tables to navigate to the next page on the rebuilt Manage Indicators page
11. NO_LOOKUP_RECORDS_FOUND
 - a. Value: "No Records Found"
 - b. Function: Label for the message that displays when no records are available in dropdown of lookup filter field in dynamic search filter on the rebuilt Manage Indicators page
12. PREVIOUS_PAGE
 - a. Value: "Previous"
 - b. Function: Label for the pagination buttons beneath the Selected Indicators, Indicator Catalog and Deactivated Indicators tables to navigate to the previous page on the rebuilt Manage Indicators page
13. REFRESH_VIEW
 - a. Value: "Refresh"
 - b. Function: Label for the button that displays within the Refresh banner on the rebuilt Manage Indicators page
14. REFERENCE_LIST_TAB
 - a. Value: "Reference List"
 - b. Function: Label for the second tab in the downloaded Budget excel file which comprises the picklist values and related record names for respective picklist and relationship fields referenced on the BUDGET_EXCEL_COLUMNS and REPORT_EXCEL_COLUMNS fieldsets
15. REFERENCE_LIST_INSTRUCTION

- a. Value: "Refer to the following available Lookup and Picklist values per field to populate on the third tab."
 - b. Function: Label for the instructions displayed on the Reference List tab of the downloaded Budget excel file
16. SELECT_VALUE
- a. Value: "Select a value"
 - b. Function: Label for the message that displays to inform users to select values from MSPL filter fields in dynamic search filter on the rebuilt Manage Indicators page
17. SHOW_MORE_ACTIONS
- a. Value: "Show More Actions"
 - b. Function: Label displays when the cursor hovers over the dropdown menu for action icons on Manage Indicators page against each project indicator in the Selected Indicators table on the rebuilt Manage Indicators page

Updated Custom Labels

1. NO_RECORDS_FOUND
 - a. Value: "You must create at least one compatible Project Indicator (Number/Currency with any disaggregation, or Percent with no disaggregation) and one compatible Reporting Period for this Project."
 - b. Function: Error message that displays on the Performance Graphs Visualforce page when there are no valid Project Indicators to display on the page.
2. PREPARE_BUDGET_UPLOAD_7
 - a. Value: "For relationship and picklist fields, you must enter the exact name of the related record or picklist value so that it is an exact match. Reference the second tab to view available options for these fields, and then input and save the selected option in the third tab."
 - b. Function: Label for the instructions displayed on the Instructions tab explaining how to use the Reference List tab to populate values in the corresponding picklist and relationship fields on the Budget tab
3. PROJECTINDICATOR_EDIT
 - a. Value: "Customize Project Indicator"
 - b. Function: Label for the header of the popup that displays when either editing a Project Indicator or creating a custom Project Indicator for the first time
4. UNDERSTAND_DOWNLOADED_BUDGET_1
 - a. Value: "1. The third tab in this sheet contains the data for a Budget"
 - b. Function: Label for the instructions displayed on the Instructions tab explaining how to understand the Budget tab in the Budget excel file downloaded from the Budget record page
5. UNDERSTAND_DOWNLOADED_RP_FINANCIAL_1
 - a. Value: "1. The third tab in this sheet contains the data for a Reporting Period"
 - b. Function: Label for the instructions displayed on the Instructions tab explaining how to understand the Budget tab in the Budget excel file downloaded from the Reporting Period record page
6. UPDATE_WARNING_MESSAGE
 - a. Value: "This page has been updated. Please refresh the page for the latest information. "
 - b. Function: Label for the warning toast on all pages that notifies users when data has been updated, such that the page needs to be refreshed to reflect the latest information.

Deleted Custom Labels

1. PREPARE_RP_FINANCIAL_UPLOAD_7

- a. Value: "7. For relationship fields like Budget or Activity, you must enter the name of the related record so that it is an exact match to upload correctly (e.g. If your Budget is "Program Budget Q1 2019" and you enter "Prog. Budget Q1 2019" for a financial line item, the upload will fail for that line item.)"
- b. Function: Label for the instructions displayed on the Instructions tab explaining how to populate values in the Budget and Activity relationship fields on the Budget tab