Release Date: 29 May 2019 | Version Name: Aquila (Spring 2019) | Version Number: 1.22

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.

Key Product Features

New Features

1. Download and Upload Budget XLS to track Planned and Actual Expenditure

Users can now download their project budget with financial line items using a *Download* button on a Budget record. An Excel file is downloaded that includes all Financial child records (if they exist). The Excel file includes an "Instructions" tab which tells the user how to enter data in a compatible manner for upload.

Zambia HIV Prevention Project - Implementation Budget

Generated by: Amp Impact Demo User 11/15/2018 1:21 AM

Type	Category	Subcategory	Line Item Name	Amount Planned	Amount Actual	Cost per Unit	Unit	Quantity	Description	Activity	Reporting Period
Expenditure	Travel	Transport	Airfare	25000	32430	16215	Flight tickets	2		Service delivery	2018
Expenditure	Office	Supplies	Testing Kits	50000	43500	100	Parcel of kits	435		Service delivery	Q1 2018
Expenditure	Office	Rent	Training Facilities	100000	64000						
Expenditure	Travel	Transport	Airfare	6000	4350						
Expenditure	Office	Supplies	Testing Kits	10000	5250						
Expenditure	Personnel	Salaries	Staff Salaries	95000	63000						
Expenditure	Office	Supplies	Training Facilities	8000	9100						
Expenditure	Travel	Transport	Airfare	6000	4000						
Expenditure	Office	Supplies	Testing Kits	10000	16400	100	Parcel of kits	164		Service delivery	Q2 2018
Expenditure	Personnel	Salaries	Staff Salaries	95000	91000						
Expenditure	Office	Supplies	Training Facilities	8000	5400						
Expenditure	Travel	Transport	Airfare	6000	5750						

An *Upload* button is now available to upload the downloaded file. The upload allows users to:

a. Update financial records related to the Budget record
b. Create new financial records.

Admin Note: The Budget download and upload can handle up to 2,000 rows of records if there are 12 columns (i.e. the same number of columns as provided out-of-the-box) in the spreadsheet.
As additional columns are added, fewer records can be downloaded. For example, the feature can handle 1800 rows of records if there are 25 columns in the spreadsheet.

A Success and Error (if applicable) log will be generated upon completion of the upload process.

Once a budget has been approved/locked whereby no further edits can be made, the *Upload* button will display an error message to notify users that the budget is locked from editing.

Admin Note

Validation

While processing the Excel file during upload, validation is built-in to check for:

- invalid file type, (e.g. user selects a word document)
- data entry (e.g. currency code entered in a number field),
- metadata (e.g. user renames a column header).

Users are provided the full list of validation checks in the Instructions tab.

Data Quality

If a user downloads a Budget Excel file and clears out existing data for a financial line item, then the upload process will clear information from the existing record. However, it will not delete the record.

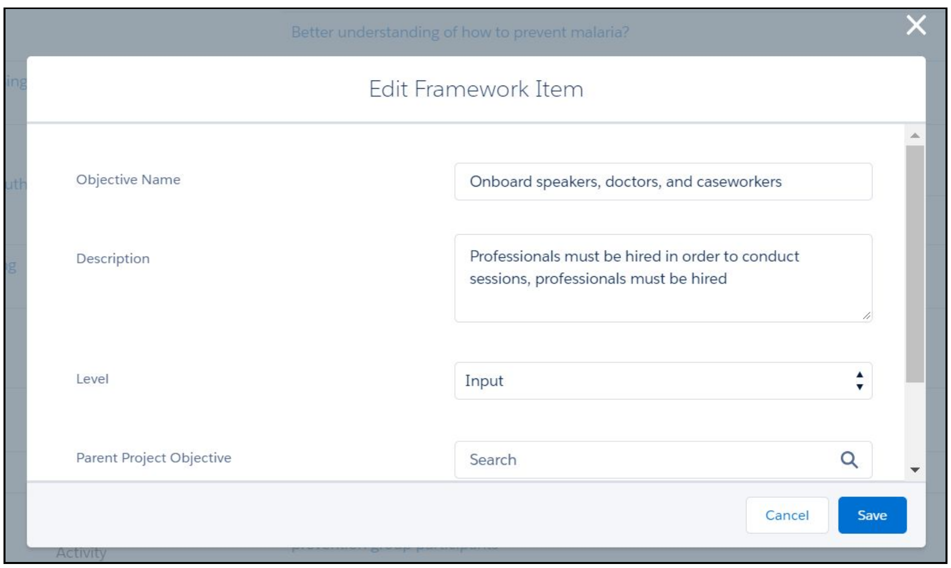
Feature Enhancements

1. Make edits to Framework Items directly on ManageFramework page

<u>Edit Framework Item(s)</u>

Use a new *Edit* icon to edit a Framework Item (i.e. Project Objective) directly on the ManageFramework page to keep track of program updates. For example, users can add/edit the:

- Description of a goal, outcome, output, etc.,
- Associated parent Objective,
- Level field.

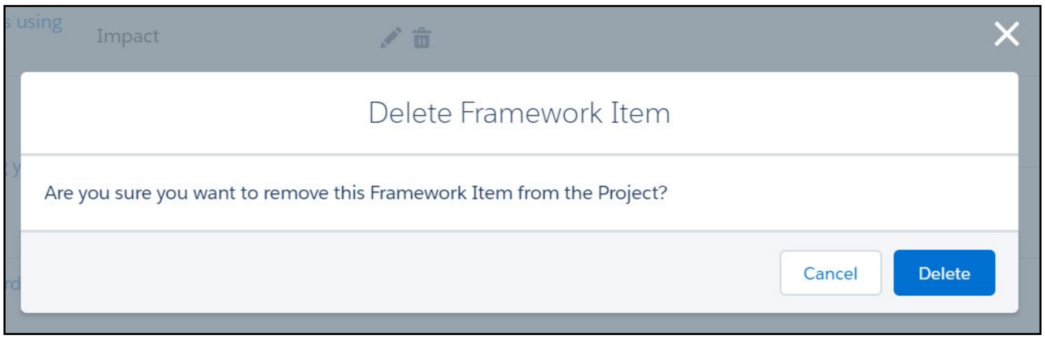


<u>Deactivate Framework Item(s)</u>

Update a new *Deactivated* field in the pop-up that opens from the *Edit* icon to deactivate a Framework Item. This will update your Framework to reflect any program/impact goal changes while preserving historic data for reporting purposes.

Delete Framework Item(s)

Use a new *Delete* icon to select and delete a Framework Item to reflect any program/impact goal changes.



Permissions-based view of ManageFramework page

Determine and manage which users have access to the ManageFramework page and the action(s) they can take on the page using Create/Read/Edit/Delete access to the Objective__c object.

User Permission	**Permission Granted?**	**Permission Restricted?**
Create	*Add New Framework Item* button is displayed	*Add New Framework Item* button is hidden
Read	User can view ManageFramework page and table User can open Project Objective records	User cannot view ManageFramework page
Edit	*Edit* icon is displayed	*Edit* icon is hidden
Delete	*Delete* icon is displayed	*Delete* icon is hidden

Admin Note

A post-install script will run on upgrade to the latest release from prior versions to populate the

Parent_Project_Objective__c on all historical Objective__c records. This is to ensure that when users edit a Logframe Item using the *Edit* icon, this edits only the information for the Project Objective and not the Catalog Objective.

2. Define the order in which Indicators display

Users can now define the order in which indicators and project indicators are displayed on the following pages:

a. ManageIndicators page, Selected Indicators and Deactivated Indicators tabs: using a new MI_Project_Indicator_Order__c field
b. ManageIndicators page, Indicators Catalog tab: using a new MI_Indicator_Order__c field
c. SetTargets and AddResults pages: using a new STAR_Project_Indicator_Order__c field

Each new field contains a picklist of all the fields on the Project_Indicator__c or Indicator__c objects. When a field is selected, the page will load in ascending order based on the field type and the values in the field (e.g. numerically ascending for a Number field, but alphanumerically ascending for a Text field). If the new fields are left blank, the page/component will default to order by alphabetically ascending Description__c.

Admin Note

The selected field does not need to be displayed on the relevant page to order by that field.

The fields in the picklist must sit on the Indicator__c or Project_Indicator__c object. This approach does not allow for selecting to order by fields on parent records.

The selected field *can* be a custom field on Indicator__c and Project_Indicator__c, as long as it is added to both objects and to the Indicator_Fields global value set as a picklist value. Note that the API Name of the picklist value must be the custom field's API Name.

3. Improvements to editing and managing Submissions and their radar charts

User experience change in the Template Builder

Previously, the *Add New Section* and *Add New Question* buttons were displayed only at the top of the CreateTemplateData Lightning component. When a user created a new Section, by default, they were added to the bottom of the template and the user would have to navigate back to the top to add a new question to that section.

Now:

- *Add New Section* and *Add New Question* buttons are displayed at the top of the component, aligned left.
- *Save* button is moved to the top of the component, aligned right.
- A scrollbar is added and all the buttons are fixed at the top of the component. Users can scroll and modify the template without having to scroll back to the top to add a new Section/Question or scroll to the bottom to save the template.

Display of Radar Charts

- A radar chart does not display for a Submission that has no Sections.
- A radar chart displays for Submissions with:
    - At least one Section where Active__c = TRUE and Is_Scored__c = TRUE
    - At least one Section where Active__c = FALSE and Is_Scored__c = TRUE to display for sections that were historically scored and have since been deactivated.

Additional changes to display of Radar Charts

- Submissions are listed in the legend of a single radar chart in alphabetical order.
- Radar charts are listed in alphabetical order based on the Template Name on the Template record.

Success messages for submissions

Previously, the success message onClick of Submit in both the SubmissionResponseForm and the SubmissionResponseScoring components referred to the same custom label, SUBMISSION_SUCCESS_MESSAGE. Since these components can be used by different types of users, the success message label has been decoupled.

A new custom label REVIEW_SUCCESS_MESSAGE with value "Review submitted successfully" is now used for the success toast on the SubmissionResponseScoring component.

Locking Submissions

When a user submits a SubmissionResponseForm (i.e. Status__c = “Submitted) or SubmissionResponseScoring (i.e. Status__c = “Reviewed”) component, the component is locked (i.e. displayed in read-only mode) once the user confirms submission in the pop-up.

Using Submissions in Flow

The following three Lightning Components are now available for Flow:

- SubmissionResponseReview
- SubmissionResponseForm
- SubmissionResponseScoring

System Administrators can set up custom Flows using these Lightning Components to display a Submission Response or Review on a related record or Lightning Home Page.

Resolved Issues

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1. **Grey background displayed on all Visualforce pages for Community users**

A grey box was displaying around the entire page when viewing any Visualforce page in a Community as a result of a Salesforce feature for NetworkBranding.

This is now resolved so the grey box does not display.

2. **Secondary row order of Activities**

When Activities are created such that Earliest_Start_Date__c is the same value, they would order primarily by ascending Earliest_Start_Date__c and then randomly.

This is now resolved so that:

- The first level of row order is by ascending Earliest_Start_Date__c.
- The second level of row order is by ascending Name.

3. **Adding custom fields to field sets used for Activities**

Due to a Salesforce limitation, users were unable to add custom fields to any of the field sets used in the Activities feature. All field types for custom fields will now be supported, except the following:

- Encrypted String
- Time

for the field sets listed below:

- CREATE_NEW_ACTIVITY_POPUP
- EDIT_ACTIVITY_POPUP
- ACTIVITY_TABLE_COLUMNS
- ACTIVITY_TABLE_SEARCH_FILTER

- In addition to Encrypted String and Time, this field set also cannot support:
  - Long Text Area
  - Rich Text Area

4. Adding custom fields to field sets used for Submissions

Due to a Salesforce limitation, users were unable to add custom fields to the ADD_EDIT_QUESTION_POPUP and ADD_EDIT_SECTION_POPUP field sets used in the Submissions feature. All field types will now be supported, except the following:

- Encrypted String
- Time
- Multi-Select Picklist

Packaging Changes

New Fields			
Object	**Field**	**Field Type**	**Functional Impact**
Budget__c	Locked__c	Checkbox	Budget Upload
Objective__c	Parent_Project_Objective__c	Lookup	Manage Framework
Objective__c	Deactivated__c	Checkbox	Manage Framework Manage Indicators Set Targets Add Results Activities
Project_Indicator__c	External_Code__c	Formula(Text)	
Project_Indicator__c	Indicator_Code__c	Formula(Text)	
Project__c	STAR_Project_Indicator_Order__c	Picklist	Set Targets Add Results
Project__c	MI_Project_Indciator_Order__c	Picklist	Manage Indicators
Project__c	MI_Indicator_Order__c	Picklist	Manage Indicators

Other Configuration Changes

 For any page layouts and field sets, a preceding asterisk indicates that the field has been marked as required.

1. **Changes to Project__c object**
    a. Lightning Record Page
        i. Set Details as the landing tab when a Project record is opened in Lightning
    b. Page Layout
        i. Removed Project Indicator related list
        ii. Added new picklist fields
2. **Changes to Indicator__c object**
    a. Page layout
        i. Updated to only include relevant buttons and fields, including:
            1. Active
            2. Aim
            3. Calculate Total
            4. Cumulative
            5. Include in Catalog
            6. Indicator Level
            7. Parent Indicator
            8. Target Frequency
            9. Targets are disaggregated
            10. *Type of Results
        ii. Added a new related list for Indicator Thematic Areas

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

Spring ’19 upgrade instructions include a table with information about which configuration changes need to be made manually, and an example of where to change them.

    b. Fields
        i. Type__c: Picklist values reduced to Core and Custom

 Admin Note: This only affects orgs that are installing Amp Impact for the first time.

3. **Changes to Project_Indicator__c object**

a. Field sets
    i. Updated EDIT_PROJECT_INDICATOR_POPUP to include:
        1. *Description__c
        2. *Data_Type__c
        3. *Type_of_Results__c
        4. Number_of_Decimals_Places_Allowed__c
        5. Baseline__c
        6. Calculate_Total__c
        7. *Reporting_Frequency__c
        8. Target_Frequency__c
        9. *Geographical_Disaggregation__c
        10. Thematic_Area_Text__c
        11. Objective__c
        12. Disaggregation_Group__c
        13. Cross_Disaggregation_by_Sex__c
        14. Targets_Are_Disaggregated__c
        15. Guideline__c
        16. Red_Yellow_Threshold__c
        17. Yellow_Green_Threshold__c
        18. Validation_Range_Minimum__c
        19. Validation_Range_Maximum__c
        20. Active__c
    ii. Updated SET_TARGETS_INFO_POPOVER to include:
        1. Objective__c
        2. Guideline__c
    iii. Updated ADD_RESULTS_INFO_POPOVER to include:
        1. Objective__c
        2. Guideline__c

4. Changes to Project_Indicator_Objective__c object

a. Field sets
    i. Updated LOG_FRAMES_TABLE to include:
        1. Project_Indicator__c > Baseline__c
        2. Project_Indicator__c > Target_To_Date__c

3. Project_Indicator__c > Result_To_Date__c

5. Changes to Activity__c object

a. Field sets

i. Updated CREATE_NEW_ACTIVITY_POPUP to include:

1. *Implementation_Plan__c
2. *Name
3. Type__c
4. Description__c
5. Parent_Activitiy__c
6. Status__c
7. *Planned_Start_Date__c
8. Planned_End_Date__c
9. Location__c
10. Project_Indicator__c > Description__c
11. Objective__c > Label__c

ii. Updated EDIT_ACTIVITY_POPUP to include:

1. *Name
2. Type__c
3. Description__c
4. Parent_Activitiy__c
5. Status__c
6. *Actual_Start_Date__c
7. Actual_End_Date__c
8. Location__c
9. Project_Indicator__c > Description__c
10. Objective__c > Label__c

iii. Updated ACTIVITY_TABLE_COLUMNS to include:

1. Project_Indicator__r.Description__c
2. Project_Objective__r.Label__c
3. Contact__r.Name

b. Page layout

i. Updated so that Implementation_Plan__c is required

6. Changes to Financial__c object

a. Field sets
   i. New field set BUDGET_EXCEL_COLUMNS:
      1. Type__c
      2. Category__c
      3. Subcategory__c
      4. Name
      5. Amount_Planned__c
      6. Amount_Actual__c
      7. Cost_Per_Unit__c
      8. Unit__c
      9. Quantity__c
      10. Description__c
      11. Activity__c
      12. Reporting_Period__c
b. Fields
   i. Reporting_Period__c: Master-detail updated to be reparentable

7. **Changes to Budget__c object**
   a. Page layout
      i. Added Download and Upload buttons (Lightning Actions)
8. **Changes to Project_Objective__c object**
   a. Field sets
      i. New field set EDIT_PROJECT_OBJECTIVE_POPUP:
         1. Label__c
         2. Description__c
         3. Level__c
         4. Parent_Objective__c
         5. Deactivated__c
   b. Page layout
      i. Added new fields Parent_Project_Objective__c and Deactivated__c
9. **Global Value Sets**
   a. New Global Value Set: Indicator_Fields
10. **Custom Labels** (See the full list of custom labels here)
   a. New custom labels

i. EDIT_FRAMEWORK_ITEM_MODAL_HEADER
    1. Value: “Edit Framework Item”
    2. Function: Header for Edit Framework Item popup on ManageLogframes
ii. DELETE_FRAMEWORK_ITEM_MODAL_HEADER
    1. Value: “Delete Framework Item”
    2. Function: Header for Delete Framework Item popup on ManageLogframes
iii. DELETE_FRAMEWORK_ITEM_TEXT
    1. Value: “Are you sure you want to remove this Framework Item from the Project?”
    2. Function: Text for Delete Framework Item popup on ManageLogframes
iv. ACTIVITY_DELETE_ERROR
    1. Value: “Delete Failed”
    2. Function: Notification when deleting an Activity in the Activity Tracking component fails
v. Any custom label where the first category is “Budget” is a new custom label. These can be updated (i.e. overridden using Translation Workbench) according to the use case.

b. Updated custom labels
    i. UNDERSTANDING_THE_DOWNLOADED_EXCEL_MAC
        1. Original Value: “a. Instructions on how to customize Number format in Mac: https://support.apple.com/kb/PH25636?locale=en_US”
        2. New Value: “a. Instructions on how to customize Number format in Mac: https://support.apple.com/kb/PH23765?viewlocale=en_US&locale=en_US”
        3. Function: Step in the Instructions tab of the Excel downloaded from STAR to customize Number format in Excel on a Mac

11. Portuguese (Brazil) Translation

a. Amp Impact is now available to be used in Portuguese. Refer to the Upgrade

Instructions for guidance on how to set up users to use Amp in Portuguese.