



Upgrade Instructions

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

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=04t46000001ZfnK>

- 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=04t46000001ZfnK>

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 Spring 2019 Release
New custom field	Yes		New <code>ampi__Locked__c</code> field added to <code>ampi__Budget__c</code> object
Updated custom field	Yes		Lookup to <code>ampi__Reporting_Period__c</code> on <code>ampi__Financial__c</code> changed to be reparentable
Permission Set	Yes		New <code>ampi__Locked__c</code> field added to Amp Impact Admin permission set
Updated Lightning Record Page	Yes		Details tab is set as default tab in Project Lightning page
Field Sets	Yes ¹	Object → Field Sets	New field set EDIT_PROJECT_OBJECTIVE_POPUP
New custom label	Yes		New custom label for header of edit popup on ManageLogframes EDIT_FRAMEWORK_ITEM_MODAL_HEADER
Updated custom label	Yes		Custom label UNDERSTANDING_THE_DOWNLOADED_EXCEL_MAC updated to contain a working URL
New global value set	Yes		New global value set Indicator_Fields
Validation Rule	Yes		Updated Error Condition Formula for Disbursement_Amt_Less_Than_Funding_Amt
Translations	Yes		New Portuguese (Brazil) translations of field labels on <code>ampi__Indicator__c</code>

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.



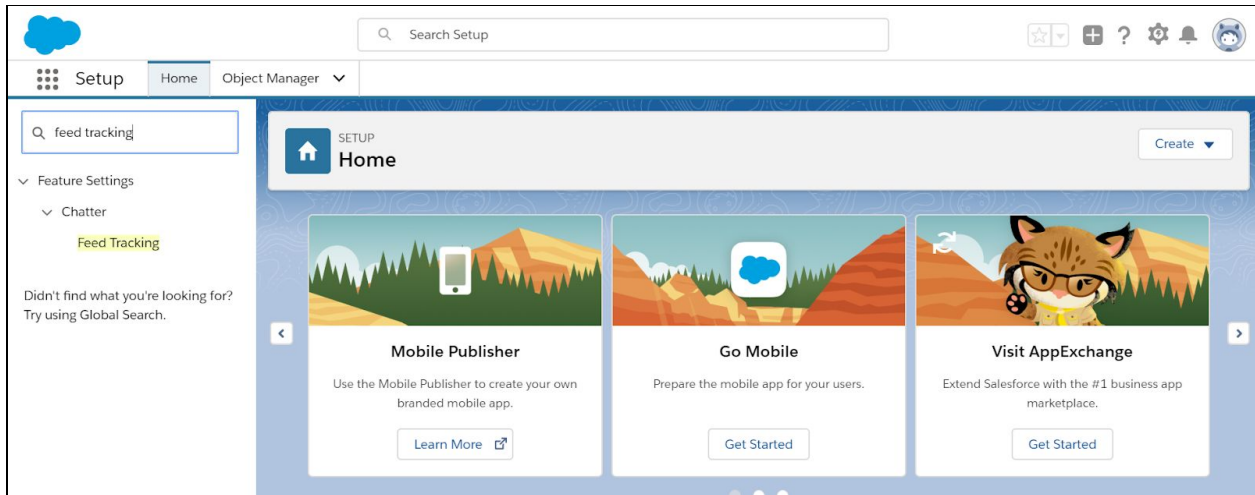
Picklist values	No	Object → Field	Reach picklist value removed from <code>ampi__Type__c</code> field on <code>ampi__Indicator__c</code> object
Page Layouts	No	Object → Page Layout	Indicator page layout optimized with more relevant fields
Search Layouts	No	Object → Search Layout	<code>ampi__Project_Reporting_Period_Name__c</code> added to Search Results to improve UX for all lookups to <code>ampi__Reporting_Period__c</code>
Report Name	No	Reports → Report Builder → Properties	Report Name for <code>Amp_Deactivated_Targets_vs_Results</code> updated to be “Deactivated Indicators Historical Data”
Feed Tracking	No	Setup → Feed Tracking	Feed Tracking enabled for <code>ampi__Budget__c</code>

Enable Feed Tracking for Budget Download / Upload

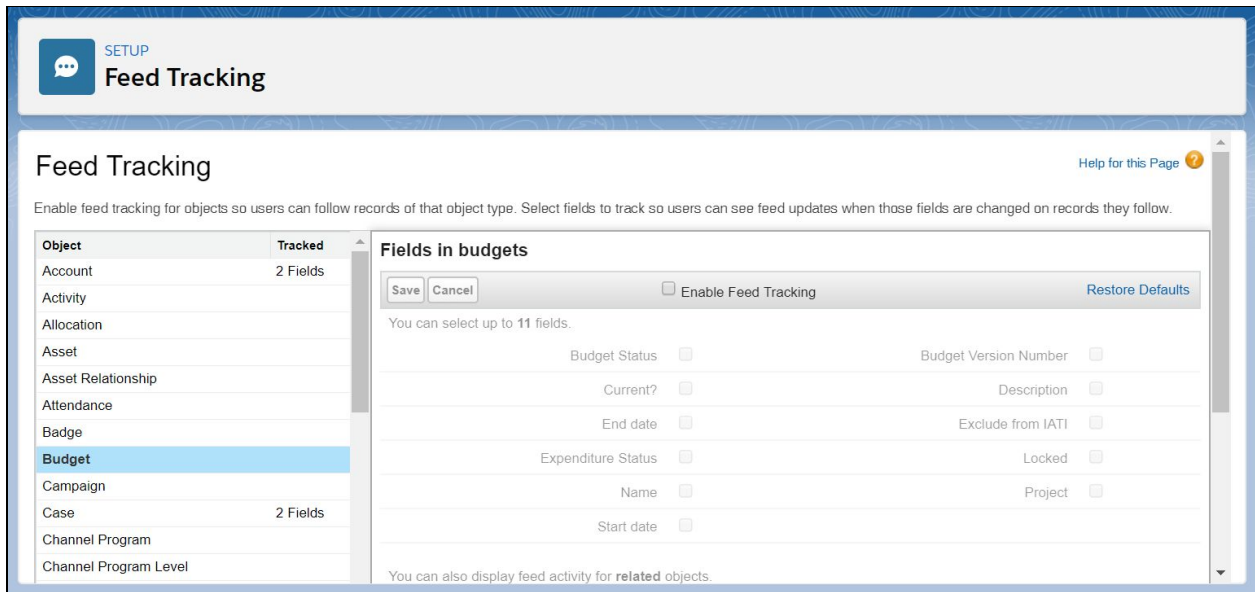
Per the final item in the configuration table, Feed Tracking must be enabled for the Budget object if your organization wants the Excel files generated by the Budget Download / Upload feature to be associated with the relevant Budget record (i.e. child Files will not be generated if Feed Tracking is disabled). If Feed Tracking is not enabled, users can still use the feature without generating Files.

To enable Feed Tracking for Budgets:

1. Open Setup and go to Feed Tracking.



2. Click Budget in the list of Objects.



3. Check the box to Enable Feed Tracking.

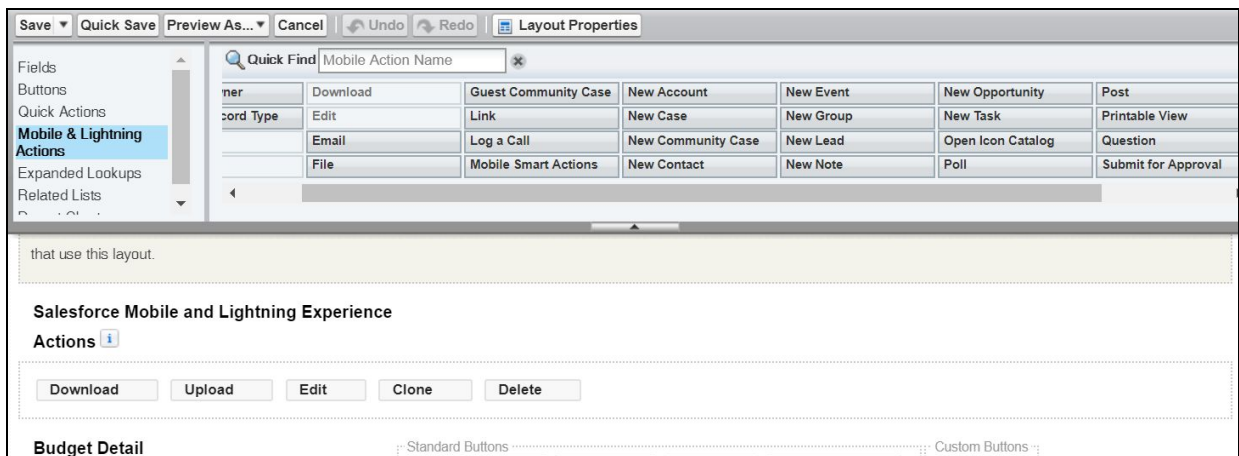
4. Click Save.



Add Download / Upload Buttons to Budget Page Layouts

Since page layouts are not automatically updated when a package is upgraded, additional configuration is needed to enable users to start using the new Excel download and upload features on Budgets.

1. Open Setup and go to Object Manager.
2. Open the Budget object.
3. Click Page Layouts in the side menu.
4. Select Budget Layout (or the custom page layout from which users will be downloading / uploading the Budget Excel).
5. In the Page Layout editor, select Mobile & Lightning Actions.



6. From the options that appear, drag Download and/or Upload into the Budget Layout.
7. Click Save.

Update Label on historical Project Objective records

The field `ampi__Label__c` was introduced in the previous release (v1.20.1), and it holds the Name value for Project Objectives (`ampi__Objective__c`). For any new Project Objectives that are created, `ampi__Label__c` is populated, but for historical records, this field will be blank. On upgrade to v1.22, this may cause some Project Objectives (which were existing prior to v1.20.1) to appear blank in the Framework table.



To ensure that the Framework table continues to display Project Objectives correctly, mass update `ampi__Label__c` on the `ampi__Objective__c` records either using a data loader or the Developer Console.

If using the Developer Console, follow the steps below:

1. Click the gear icon at the top right of the page and select “Developer Console”.
2. Type CTRL + E to open Execute Anonymous.
3. In the Execute Anonymous window, paste this text:

```
List<ampi__Objective__c> obj = [Select Id, ampi__Objective__r.Name FROM
ampi__Objective__c WHERE ampi__Label__c = NULL];

for (ampi__Objective__c po : obj) {
    po.ampi__Label__c = po.ampi__Objective__r.Name;
}

update obj;
```

4. Highlight the pasted text and click “Execute Highlighted”.
5. Close the window and navigate to the Framework page on any Project to view the Framework.

Start Using Amp Impact in Portuguese

Amp Impact now contains Portuguese translations for many of its features. To start using Amp Impact in Portuguese, Translation Workbench must be enabled and Portuguese (Brazil) must be activated. If these are not already in place, follow the steps below:

1. Open Setup and go to Translation Settings.
2. Click Enable.
3. Click Add in the Supported Languages menu.
4. Select Portuguese (Brazil) and leave Active as checked.
5. (Optional) Add a translator for the language.
6. Click Save.

To set Portuguese as the default language for all users in the org:

1. Open Setup and go to Company Information.
2. Click Edit.



3. Set Default Language as Portuguese (Brazil).
4. Click Save.

To set Portuguese as the default language for a specific user:

1. Open Setup and go to Users.
2. Click Edit next to the User who will be using Amp in Portuguese.
3. Set Language to Portuguese (Brazil).
4. Click Save.

Custom Settings: Configure triggers in Dynamic Loader

When upgrading to v1.22, 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.'

Upgrading to this version will deactivate the triggers on Catalog Objective. New triggers on Project Objective have been created and will be activated with the latest version of Amp that replace the functionality of the inactive Catalog Objective triggers.

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.