

Upgrade Instructions

Version Name: Electra | Release Date: Winter 2021 | Version Number: v1.26.1

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 Electra - v1.26.1

ⓘ Admin Note:

A Salesforce environment with Amp installed can be directly upgraded to the latest version of Amp as long as the current version is v1.17.1 or later. If the version of Amp is an earlier version, you must first upgrade to v1.17.1 before upgrading to v1.26 (Electra). When upgrading to this version and skipping previous upgrades, please be sure to follow the Upgrade Instructions for every [intermediate release](#) as well to ensure the app continues working as expected.

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=04t4o000001URC1>

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=04t4o000001URC1>

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=04t4o000001URC1
```

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). For full details on what Salesforce supports when upgrading managed packages, refer to the [Editing Components and Attributes After Installation](#) and [Special Behavior of Components in Packages](#) pages.

The table below details which types of configuration changes need to be made manually in this release, 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 Electra Release
New object	Yes		New <code>ampi__xx_Framework__c</code> object
New custom metadata type record	Yes		New custom metadata type record Object Lookup Label Mapping
New field	Yes ¹		New field <code>ampi__xx_Percent_Complete__c</code> added to <code>ampi_Activity__c</code>
New custom label	Yes		New custom label HIDE_BASELINE
Updated process	Yes		
New field set	Yes		New field set <code>Add_Catalog_Objective_Popup</code> on <code>ampi_Catalog_Objective__c</code>
New custom setting	Yes ²	Custom Settings	New custom setting <code>ampi__xx_Dynamic_Relationship__c</code>
Updated object label	Yes		Updated label for <code>ampi_Objective__c</code> from "Project Objective" to "Framework Objective"
Updated permission set	Yes		Read/Edit access added to <code>ampi__xx_Percent_Complete__c</code> on <code>ampi_Activity__c</code> in the <code>Amp_Impact_Admin</code> permission set
Updated custom label	Yes		Value for <code>ADD_NEW_OBJECTIVE_POPUP_HEADER</code> changed to "Add Custom Framework Objective"
Updated field sets	Yes ³	Object - Field Sets	

¹ New fields are populated as NULL by default.

² If using the `ampi_Dynamic_Relationship__c` custom setting introduced from Delphinus, that record will automatically be copied into the `ampi__xx_Dynamic_Relationship__c` custom setting.

³ 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	Updated help text for <code>ampi__Actual_Start_Date__c</code> on <code>ampi__Activity__c</code>
Updated page layouts	No	Object → Page Layouts	New field <code>ampi__xx_Include_In_Catalog__c</code> added to page layout for <code>ampi__Catalog_Objective__c</code>

Set Up Amp Functionality on Other Salesforce Objects

By default, Amp Impact Features (Manage Framework, Manage Indicators, Set Targets, Add Results, Performance Graphs, and Manage Disbursements) are available on the Project object. To use these features on other Salesforce objects, please follow these steps:

Create a custom relationship between Project object and another object

Configure a lookup field on the Project object to start using Amp Impact Features on another object's records. You can choose to add a lookup to a standard Salesforce object, an Amp Impact object, or any custom object in your Salesforce system.

Create a Dynamic Relationship custom setting record

Once Project is related to another object, a custom setting record will need to be created in order to correctly display the Amp Impact features (Manage Framework, Manage Indicators, Set Targets, Add Results, Performance Graphs, and Manage Disbursements) on the parent object record pages. The purpose of this custom setting record is to store this metadata for the feature component to query.

① A custom setting record should be created for every relationship field that is added on Project for each feature.

e.g. If Manage Indicator Feature needs to be used on both the Account object and a custom object, then the system admin will need to create 2 Dynamic Relationship custom setting records. One mapping the ManageIndicators component to the Account object and another to map the ManageIndicators component to the custom object.

Follow these steps to create Dynamic Relationship custom setting record:

1. Go to Custom Settings in Setup.
2. Click "Manage" next to Dynamic Relationship.
3. Click the "New" button.
4. Fill out the *Name* field with the name of the custom setting record. It can be anything based on your organization's requirements.
5. Fill out the *Object Name* field with the API name of the object you want to use the Amp Impact feature on.
 - a. e.g. If Manage Indicators should be used on the object, then fill Account in the *Object Name* field. (Please include correct namespaces for API names for packaged fields)
6. Fill out the *Page Name* field to specify the feature you want to use on another object.

- a. e.g. If Manage Indicators should be used on the object, then fill ManageIndicators in the *Page Name* field.
- b. Please refer to the following Page Names to specify the relevant feature:

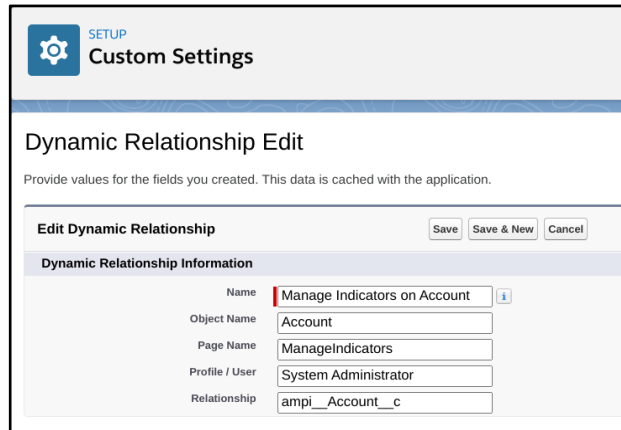
Amp Impact Feature	Page Name
Manage Indicators	ManageIndicators
Manage Frameworks	ManageFramework
Activities	ActivityTracking
Set Targets	SetTargets
Add Results	AddResults
Performance Graphs	PerformanceGraph
Manage Disbursements	ManageDisbursements

7. Fill out the *Profile / User* field to specify the Profile name or User name for which feature should be available on the specified object
 - a. Continuing the above example, If users with the System Administrator profile should be able to view ManageIndicators component, then specify System Administrator in the *Profile / User* field.

ⓘ Please note that Dynamic Relationship custom setting record should be created for each profile/ user which needs access to the feature (specified in the Page Name) on other object (specified in the Object Name)

8. Fill out the *Relationship* field to specify the API name of the lookup field on Project object relating Project to the specified object. (Please include correct namespaces for API names for packaged fields)

In the following example, Dynamic Relationship custom setting record enables the users with System Administrator profile to use Manage Indicators feature on the Account object.



SETUP
Custom Settings

Dynamic Relationship Edit

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

Edit Dynamic Relationship Save Save & New Cancel

Dynamic Relationship Information

Name	Manage Indicators on Account
Object Name	Account
Page Name	ManageIndicators
Profile / User	System Administrator
Relationship	ampi_Account_c

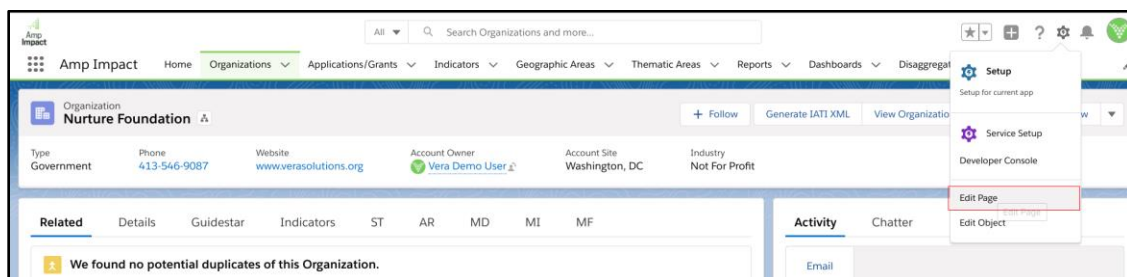
❶ Please note that for Amp Impact features to work as expected on other objects, there should be a one-to-one relationship between the project record and other object record. If more than one Project records are related to the other object record, the feature component (Manage Framework, Manage Indicators, Set Targets, Add Results, Performance Graphs, or Manage Disbursements) might display the related records (e.g. Framework Objectives, Project Indicators, Targets, Results, Disbursements) from any one of the related Project records (i.e. the related Projects will not “roll up” to the parent object record).

If your organization needs a many-to-one relationship between the Project object and other object, we advise creating a separate custom relationship field to specify one-to-one relationship, and use that relationship field while specifying the Relationship field in the Dynamic Relationship custom setting record.

Add the required feature(s) to Lightning page of the other object

To make the Amp Impact feature component available on the other object, it should be added to the lightning page of that object.

1. Navigate to the other object’s record page
2. Click on the Gear icon
3. Click on the Edit Page in the dropdown

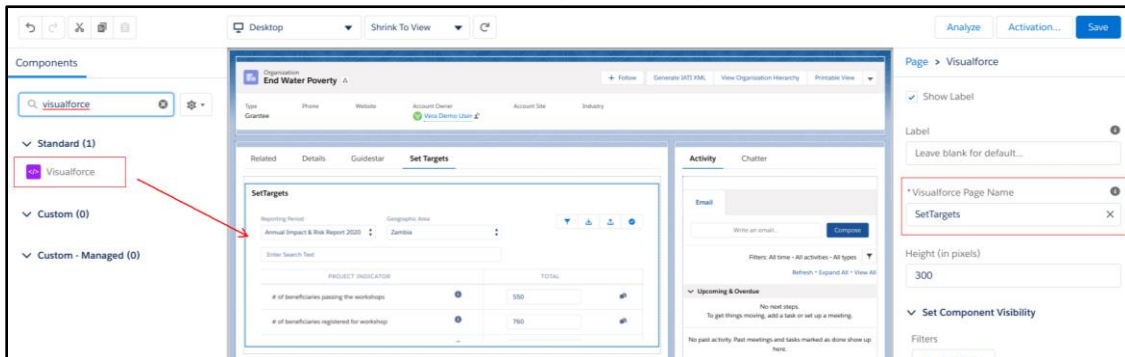


4. (Optional) Add a new tab for the new feature and name it as per your organization’s vocabulary
5. On the left hand pane, locate the relevant feature component and add it to the lightning page.

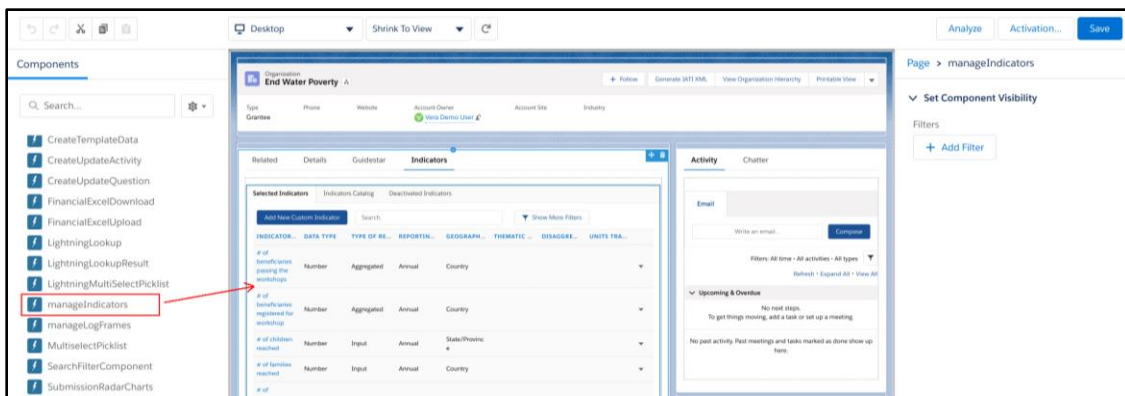
- a. Please refer to the following table to identify and add the Amp Impact features to the lightning page:

Amp Impact Feature	Process to add the component to the lightning page
Manage Framework (Visualforce page)	<ol style="list-style-type: none"> 1. Drop Standard-> Visualforce component on the page 2. Click inside the dropped component 3. Select Visualforce Page Name as ManageLogFrames on the right hand pane
Manage Frameworks (Lightning web component)	<ol style="list-style-type: none"> 1. Drop Custom-Managed-> manageLogFrames on the page
Activites (AURA component)	<ol style="list-style-type: none"> 1. Drop Custom-Managed-> ActivityChart on the page
Activities (Lightning web component)	<ol style="list-style-type: none"> 1. Drop Custom-Managed-> activities on the page
Manage Indicators (Visualforce page)	<ol style="list-style-type: none"> 1. Drop Standard-> Visualforce component on the page 2. Click inside the dropped component 3. Select Visualforce Page Name as ManageIndicators on the right hand pane
Manage Indicators (Lightning web component)	<ol style="list-style-type: none"> 1. Drop Custom-Managed-> manageIndicators on the page
Set Targets (Visualforce page)	<ol style="list-style-type: none"> 1. Drop Standard-> Visualforce component on the page 2. Click inside the dropped component 3. Select Visualforce Page Name as SetTargets on the right hand pane
Add Results (Visualforce page)	<ol style="list-style-type: none"> 1. Drop Standard-> Visualforce component on the page 2. Click inside the dropped component 3. Select Visualforce Page Name as AddResults on the right hand pane
Performance Graphs (Visualforce page)	<ol style="list-style-type: none"> 1. Drop Standard-> Visualforce component on the page 2. Click inside the dropped component 3. Select Visualforce Page Name as PerformanceGraph on the right hand pane
Manage Disbursements (Visualforce page)	<ol style="list-style-type: none"> 1. Drop Standard-> Visualforce component on the page 2. Click inside the dropped component 3. Select Visualforce Page Name as ManageDisbursements on the right hand pane

In the following example the Set Targets (Visualforce) is added to the lightning page:



In the next example, Manage Indicators (Lightning web component) is added to the lightning page:

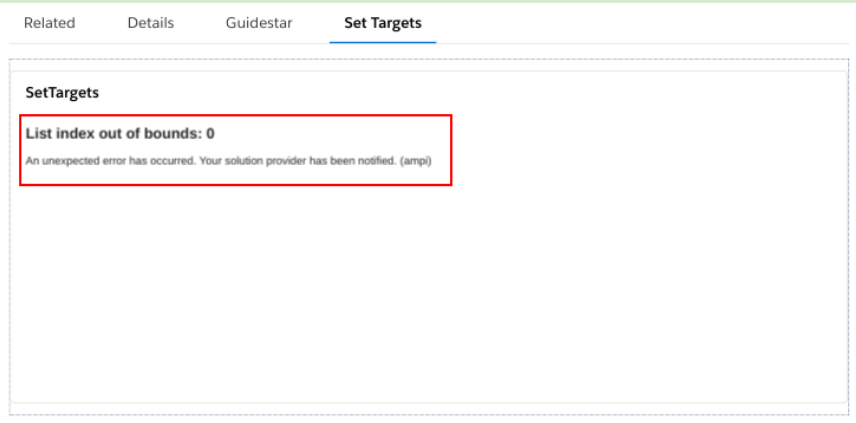


6. Save the page by clicking on the 'Save' button
7. Activate the page by clicking on the 'Activation' button and assign the page as Org Default, App Default, or to specific Profile(s) as per your organization's needs.

Relate the relevant Project record to the other object record

The last step to use Amp Impact features on other objects is to make sure that the Project record is related to the other object record (i.e. the lookup field on Project is populated with the other object's record, such as an Account record) on which the Amp Impact features are to be used.

ⓘ Please note that if the other object is not related to a Project object, the user will get an error on the Amp Impact feature added to it.



The screenshot shows a web interface with a navigation bar containing 'Related', 'Details', 'Guidestar', and 'Set Targets'. The 'Set Targets' page displays an error message in a red-bordered box: 'List index out of bounds: 0' followed by 'An unexpected error has occurred. Your solution provider has been notified. (ampi)'.

Once all the steps are complete, users can access Amp Impact features on other objects.

Update Historical Data for Catalog Objective Records

A new checkbox field `ampi__xx_Include_In_Catalog__c` added to `ampi__Catalog_Objectives__c`. By default, for any Catalog Objective records existing before the upgrade, they will be marked as FALSE in this field, and therefore will not display in the Catalog of Objectives in the new Manage Frameworks Lightning Web Component.

To ensure that the Manage Frameworks page displays information accurately, mass update Objective records so that `ampi__xx_Include_in_Catalog__c` is TRUE, using the instructions detailed below:

1. Using any preferred data loader, extract all `ampi__Catalog_Objective__c` records with the following fields:
 - a. Record ID
 - b. Name
 - c. Include in Catalog?
 - d. All other fields are optional
2. Open the exported CSV file. Change the value of all cells in the Include in Catalog? column from FALSE to TRUE for any Catalog Objectives that should be accessible to all projects.
3. Save the file.
4. Import the file as an Update/Upsert action, mapping the Record IDs in the CSV to the Record IDs in the environment.

Update Field Sets for Manage Frameworks Updates

ⓘ
Admin
Note:

This step should only be followed if the Objective Name should remain the first column in the tables on the Manage Frameworks Visualforce page and/or Lightning Web Component. Other fields may also be defined as the first column in these tables.

Although these fields are automatically added to the field set, they are appended to the end of the field set, so they will not be the first, hyperlinked column in the table.

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

Object API Name	Field Set API Name	Update(s)
ampi__Objective__c	ampi__LOG_FRAMES_TABLE	Move ampi__Label__c to be the first field in the field set.
ampi__Project_Indicator_Objective__c	ampi__LOG_FRAMES_TABLE	Move ampi__Project_Indicator__r.ampi__Description_Translated__c to be the first field in the field set.

Update Field Sets for Manage Disbursements Updates

Due to the increased flexibility in the display of the Manage Disbursements Visualforce page, the following field sets need to be modified to maintain the user interface from previous releases.

Object API Name	Field Set API Name	Update(s)
ampi__Disbursement__c	ampi__DISBURSEMENT_TABLE	Reorder the fields in the field set as follows: <ul style="list-style-type: none"> • ampi__Scheduled_Date__ • campi__Amount__c • ampi__Percent_Of_Funding

		_Amount__c • ampi__Status__c
ampi__Disbursement__c	ampi__ADD_EDIT_POPUP	Reorder the fields in the field set as follows: • ampi__Amount__c • ampi__Scheduled_Date__c • ampi__Status__c

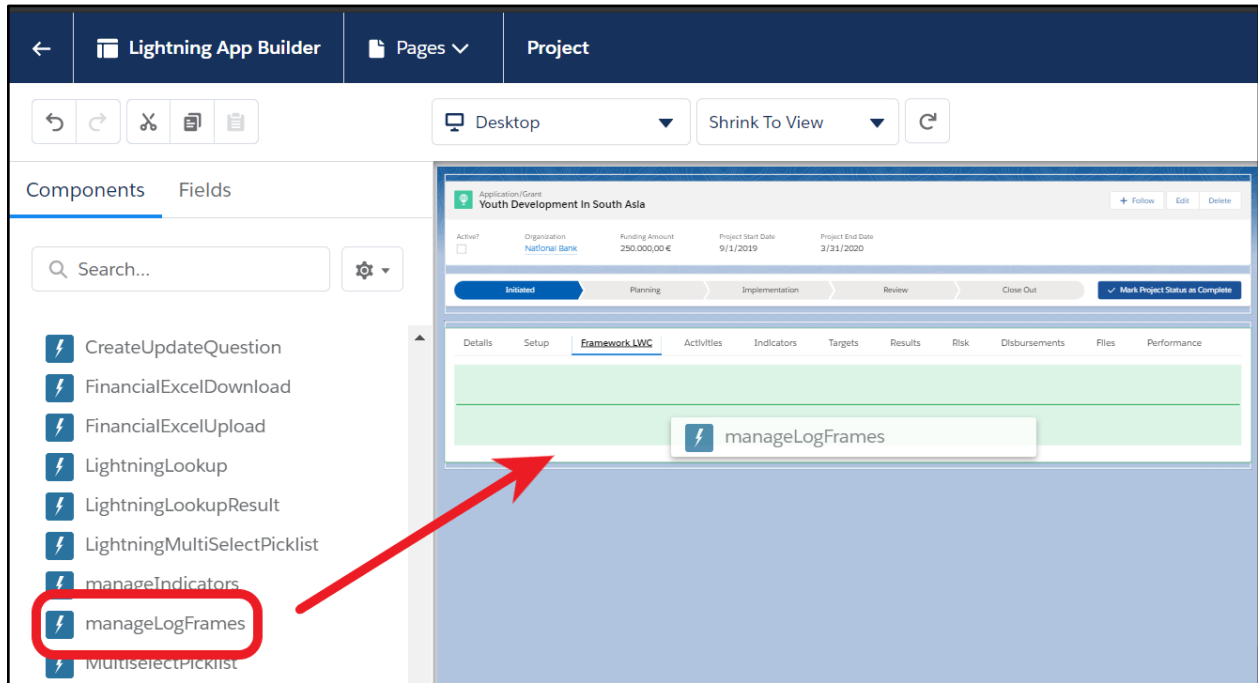
Switch to the new Lightning Web Components in Record Pages

To preserve existing functionality on the Project Lightning Record Page, the new *activities* and *manageLogFrames* Lightning Web Components have not been immediately added to the page. If your organization wishes to switch to this new interface (see the new Manage Frameworks and Activities user guides to learn more), follow the below steps:

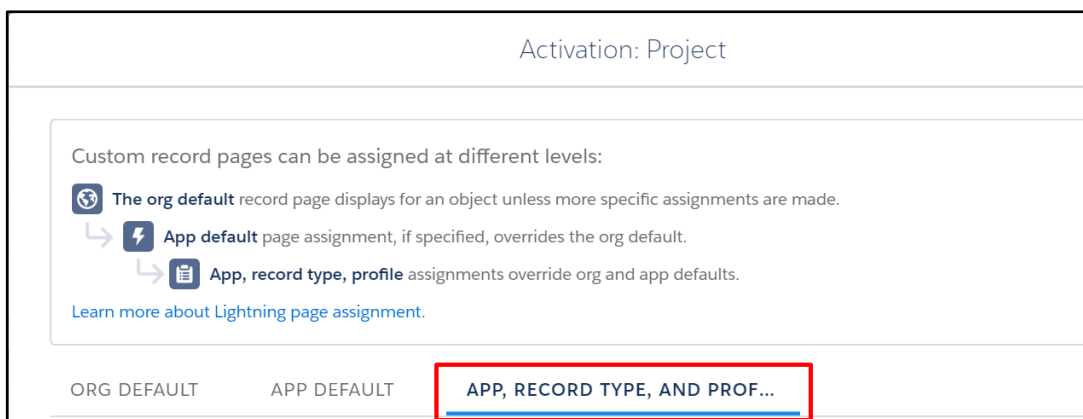
ⓘ Admin Note:

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 instead of Step 1.

1. Create a clone of the Project Lightning Record Page.
2. In Lightning App Builder, click on the “Framework” tab to open up the Tab component editor on the right-hand pane.
3. Remove the Visualforce component from the “Framework” tab.
4. On the left-hand pane, scroll down to Custom - Managed Components.
5. Drag *manageLogFrames* from the pane and drop it into the “Framework” tab.



6. Click on the “Activities” tab to open up the Tab component editor on the right-hand pane.
7. Remove the Aura component from the “Activities” tab.
8. On the left-hand pane, scroll down to Custom - Managed Components.
9. Drag activities from the pane and drop it into the “Activities” tab.
10. Click “Save”.
11. Click “Activation”.
12. Click on the “App, Record Type, and Profile” tab.



13. Assign the Lightning page to Amp Impact.
14. Click Next.
15. Assign the record type to Master (or whatever record type used in impact management and work planning).

Update Help Text for Activity Date Fields

ⓘ Admin Note:

These steps should be taken if the [activities Lightning Web Component will be used](#) to track implementation plans.

Since the behavior of the date fields in the *activities* Lightning Web Component differs from the behavior of the date fields in the Aura Component, help text has been added to the four date fields on `ampi__Activity__c` to inform users on how to use them in the new user interface. The help text below is recommended and can be modified to include any additional guidance as needed.

Field API Name	Updated Help Text
<code>ampi__Actual_Start_Date__c</code>	When the Actual Start Date is left blank, the popover on the actual timeline displays the Actual End Date in its place.
<code>ampi__Actual_End_Date__c</code>	When the Actual End Date is left blank, the popover on the actual timeline displays the Actual Start Date in its place.
<code>ampi__Planned_Start_Date__c</code>	When the Planned Start Date is left blank, the popover on the actual timeline displays the Planned End Date in its place.
<code>ampi__Planned_End_Date__c</code>	When the Planned End Date is left blank, the popover on the actual timeline displays the Planned Start Date in its place.

Customize Process Automation for Creating Framework Objectives

ⓘ Admin Note:

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

The process `ampi__Pull_Objective_Level_onto_Project_Objective` has been updated so that the field updates are consolidated into a single Update Records action. This process copies values entered into fields on the parent `ampi__Catalog_Objective__c` record into the fields of the child `ampi__Objective__c` record when that record is created. By default, the following fields are copied:

- `ampi__Description_Language_1__c`
- `ampi__Description_Language_2`

- `ampi__Description_Language_3__c`
- `ampi__Description__c`
- `ampi__Name_Language_1__c`
- `ampi__Name_Language_2__c`
- `ampi__Name_Language_3__c`
- Name
- `ampi__Level__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 Page Layouts for Objects and Custom Metadata Types

Per the release notes, page layout changes have been made on multiple objects and custom metadata types, 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.

Set Up Custom Metadata Type Records for Lookup Filtering

The System Admin may define an alternative field to display in components in the place of the default Name shown in lookups and master-detail relationship fields by configuring Custom Metadata Type (CMDT) records under the `ampi__Object_Lookup_Label_Mapping__mdt` CMDT. For example, if the Name field is an Auto-number field, the System Admin may use this custom metadata type to display a Label or Description field in the lookup/master-detail field in a popup instead of the Auto-Number name, to improve the user experience.

The lookup display field configuration affects the following pages:

- Manage Indicators as a Lightning Web Component
- Manage Frameworks as a Lightning Web Component
- Activities as a Lightning Web Component
- Financials Excel Upload/Download
- Manage Frameworks Visualforce page.

1. To add a new record for customization, navigate to Setup and in the Quick Find box enter 'Custom Metadata Types'.
2. Click on 'Manage Records' to the left of the `ampi__Object_Lookup_Label_Mapping__mdt` CMDT, as shown below.

All Custom Metadata Types [Help for this Page](#)

Custom metadata types enable you to create your own setup objects whose records are metadata rather than data. These are typically used to define application configurations that need to be migrated from one environment to another, or packaged and installed.

Rather than building apps from data records in custom objects or custom settings, you can create custom metadata types and add metadata records, with all the manageability that comes with metadata: package, deploy, and upgrade. Querying custom metadata records doesn't count against SOQL limits.

New Custom Metadata Type						
Action	Label	Namespace Prefix	Visibility	Api Name	Record Size	Description
Del Manage Records	IATI Default Contact	ampi	Public	ampi__IATI_Default_Contact__mdt	1546	Custom metadata type to specify default contact information for IATI reporting
Del Manage Records	IATI Default Reporting Org	ampi	Public	ampi__IATI_Default_Reporting_Org__mdt	251	Custom metadata type to setup default reporting org information for IATI Reporting
Del Manage Records	Object Lookup Label Mapping	ampi	Public	ampi__Object_Lookup_Label_Mapping__mdt	1161	Custom metadata type to define which record field is displayed in a lookup field's dropdown in Amp interfaces. If this is not defined for any lookup field, Name will display by default in the dropdown.

3. Populate the new record as follows:

- **Label** - Label of the CMTD record should follow the convention [Child Object Name] - [Lookup Field Name]
 - e.g. Objective - Parent Objective
- **Child Object Name:** API name of the object on which the lookup field exists
 - e.g. ampi__Objective__c
- **Parent Object Name:** API name of the parent object in the lookup relationship
 - e.g. ampi__Catalog_Objective__c
- **Lookup Field Name:** API name of the lookup field
 - e.g. ampi__Catalog_Objective__c
- **Label Field API Name (Field_To_Use__c):** API name of the field to be displayed in the dropdown
 - e.g. ampi__Label__c
 - Note that Field_To_Use__c is the field API name to be used for searching the record as well as displaying the value in the lookup field on the Visualforce page.
 - The defined field **cannot** be a LongTextArea or RichTextArea field.
 - If either field type is used as the Label Field for a relationship field in either of the [Financial Excel Download field sets](#), the Excel Download will fail.

4. (Optional) Configure a lookup filter using attributes of label, operator, and value. Note that the lookup filter configuration only affects Financials Excel Upload/Download and the Manage Frameworks Visualforce page.

- a. Accepted filter operator are as follows:
 - i. Equals
 - ii. Does not equal
 - iii. less than
 - iv. greater than
- b. For example, organizations may configure a lookup filter to ensure that the lookup only displays records related to the same Project. The value for the Filter field of the ampi__Object_Lookup_Label_Mapping__mdt record would then be:

```
{
  "label": "ampi__Project__c",
  "operator": "equals",
```

```
"value": "ampi__Project__c"
}
```

Amp Impact offers this use case for the Budget__c lookup on Financial records in its managed package, see screenshot below.

Object Lookup Label Mapping Detail Edit Clone

Label	Financial - Budget
Object Lookup Label Mapping Name	Financial_Budget
Namespace Prefix	ampi
Filter	<pre>{ "label": "ampi__Project__c", "operator": "equals", "value": "ampi__Project__c" }</pre>
Protected Component	<input type="checkbox"/>

- c. Other examples Organizations may consider depending on their use case include:
 - i. **ampi__Objective__c** - Only display records whose parent ampi__Project__c is the same record as the parent ampi__Project__c of the ampi__Financial__c record's parent ampi__Budget__c or ampi__Reporting_Period__c
 - ii. **ampi__Project_Indicator__c** - Only display records whose parent ampi__Project__c is the same record as the parent ampi__Project__c of the ampi__Financial__c record's parent ampi__Budget__c or ampi__Reporting_Period__c
 - iii. **ampi__Account__c** - Only display Account records where ampi__Organization_Type__c = "Vendor"

5. Click 'Save'.

If a record under the ampi__Object_Lookup_Label_Mapping__mdt CMTD is not defined, then the default field displayed is the value from the Name field on the parent Object.

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__xx_Framework__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.