

Amp Impact Release Notes

Version Name: Electra | Version Number: 1.26 | Release Date: February 2021

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 Frameworks rebuild as Lightning Web Component

The Manage Frameworks page has been rebuilt as a Lightning Web Component. With this new interface, the page now also accommodates three key updates: multiple frameworks, ability to add objectives from a catalog, and compatibility with standard/custom objects.

Multiple Frameworks

In the Visualforce version of the page, a single record could only have one associated Framework. Since there may be a need to create more than one Framework on a single record (e.g. reporting on different logical frameworks to different funders), the Lightning Web Component version of Manage Frameworks enables the user to create, edit, and view multiple Frameworks within the same page.



Community Development Framework	Level	Thematic Area	Baseline	Target To Date	Result To Date	Indicator Definition Translated
Community Development Framework	Impact					
Educational Framework	Outcome					
Professional Development Framework	Outcome					
Remove barriers to education						
Empower women to speak						
Higher attendance during training workshops						
Increase awareness among students	Impact	a0m6g000009fCAAQ				
Improve wash related health issues in the country	Output					

Catalog of Objectives

In earlier versions, only custom objectives could be added directly on the path, and catalog-level objectives could only be added to a framework through the related list on Project. With this new version, the catalog of objectives will be accessible directly on the page, so that users can easily add and build out their framework.

Add Objective

Show More Filters

SELECT	OBJECTIVE NAME TRANSLATED	DEFINITION TRANSLATED	LEVEL	OBJECTIVE NAME
<input type="checkbox"/>	Add HIV prevention to school curriculums		Output	IR 1.1: Reduce risk of HIV in key populations
<input type="checkbox"/>	Bringing proper sanitation and healthy lifestyles to people in our community		Outcome	
<input checked="" type="checkbox"/>	> Conduct cost-less trainings		Impact	
<input type="checkbox"/>	Daily productivity in remote work		Outcome	Improve dissemination
<input checked="" type="checkbox"/>	Empower women to speak			
<input checked="" type="checkbox"/>	Higher attendance during training workshops	Present at trainings	Outcome	

Total Records Selected: 6

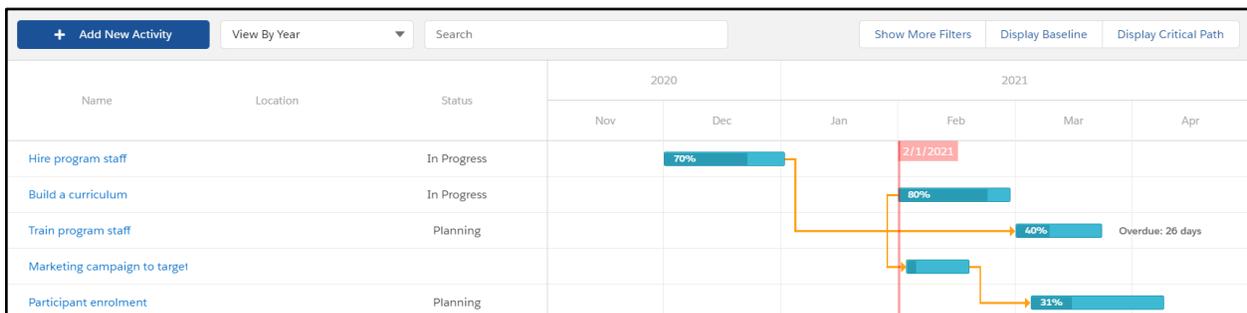
Cancel Add Selected

Activities Gantt Chart rebuild as Lightning Web Component

The Activities Gantt Chart page has been rebuilt as a Lightning Web Component. With this new interface, the page now also accommodates multiple key updates: activity dependencies, drag and drop rescheduling, track percent completion, critical path, and compatibility with standard/custom objects.

Activity Dependencies

Users can now create, manage, and visualize dependencies between activities to mark whether one activity can only start based on the milestone (e.g. start, end) of another activity. Users can add these dependencies directly in the Gantt chart by clicking on the leading activity and dragging the dependency arrow to the following activity.

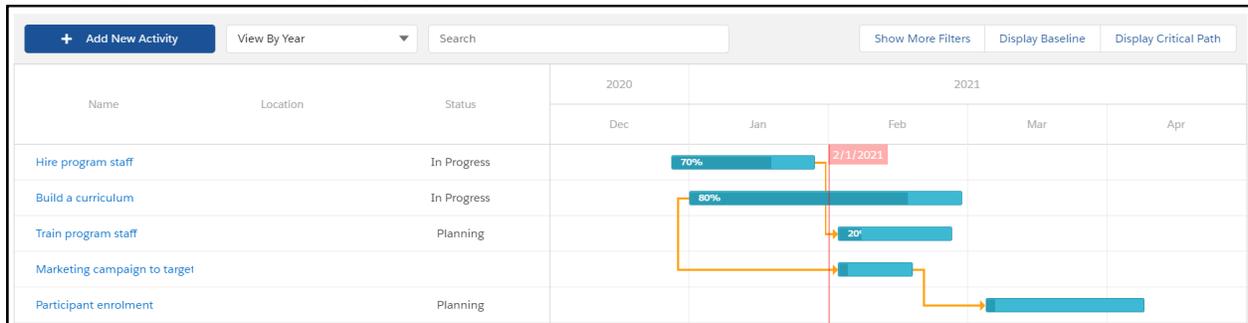


Drag and Drop Rescheduling

In the Aura Component version of the page, users had to open the Edit Activity popup in order to reschedule an activity. In the new Lightning Web Component, users can simply click on the activity's timeline within the Gantt Chart and drag it to a new place in the Implementation Plan's timeline to reschedule.

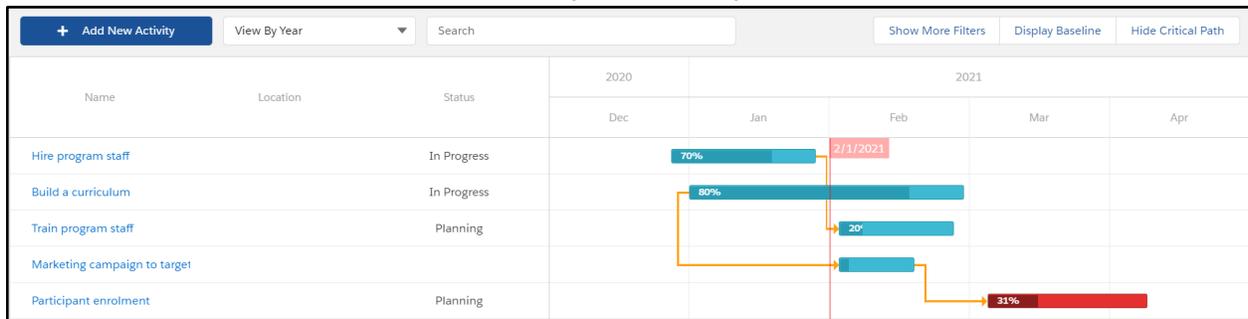
Track Percent Completion

Mark progress for an activity by filling in the timeline bar to indicate the percent completion.



Critical Path

Define and visualize the critical path of an implementation plan, by tracking the set of activities that must start and finish on time in order to ensure the implementation plan ends on schedule.



Compatibility with Standard/Custom Objects

The components listed below can now be used on any object, including standard Salesforce objects and custom objects:

- Manage Frameworks Lightning Web Component
- Activity Gantt Chart Lightning Web Component
- Set Targets Visualforce Page
- Add Results Visualforce Page
- Manage Disbursements Visualforce Page
- Performance Graphs Visualforce Page

Admin Note:

The Manage Indicators Lightning Web Component was already made compatible with any object in the previous Amp release.

Details on how to set this up can be found in the Installation Guide.

Library of Reference Data

With this release of Amp Impact, a [library of reference/catalog data](#) is now available. This includes ready-to-upload spreadsheets of several catalog-level Amp objects (e.g. Geographic Areas, Indicators, Objectives), based on standard libraries used throughout the social impact space. Below you will find the standard libraries included in this release, along with the Amp objects that will be supported.

DFID

The [Department for International Development \(DFID\)](#) was the United Kingdom's former government department responsible for administering international aid. Its Results Framework provides a standard for impact measurement that enables organizations to track their progress toward and contribution to the UN's Millennium Development Goals (MDGs).

DFID Data	Amp Object Label	Amp Object API Name
MDG	Thematic Area	ampi_Thematic_Area__c
Pillar		
Indicator	Indicator	ampi_Indicator__c
<i>Result Commitment</i>	<i>Result</i>	<i>ampi_Result__c</i>
Coalition Priority	Objective	ampi_Catalog_Objective__c
Structural Reform Plan/Action		

IRIS+

[IRIS+](#) is an initiative by the Global Impact Investing Network (GIIN) to provide a standard set of indicators for investors to monitor their impact across different impact categories, enabling them to optimize positive impact and minimize negative impact.

IRIS Data	Amp Object Label	Amp Object API Name
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Metric	Indicator	ampi_Indicator__c
Sub-Metric		
Primary Impact Category	Thematic Area	ampi_Thematic_Area__c
Impact Category and Theme		
SDG Goal		
SDG Targets	Objective	ampi_Catalog_Objective__c

ⓘ Admin Note:

The SDG Goals and Targets can be uploaded from the SDG Library.

SDG

The [Sustainable Development Goals \(SDGs\)](#) are a set of 17 goals set by the United Nations in the 2030 Agenda for Sustainable Development as an international call for action. Within each Goal is a set of Targets and Indicators that development organizations can use to monitor their impact within each Goal.

SDG Data	Amp Object Label	Amp Object API Name
SDG Goal	Thematic Area	ampi_Thematic_Area__c
SDG Target	Objective	ampi_Catalog_Objective__c
SDG Indicator	Indicator	ampi_Indicator__c

ISO-3166

The [International Organization for Standardization \(ISO\)](#) collects and publishes international standards in its catalog. Among their most commonly used standards in the development space, ISO-3166 defines country codes that enables organizations to codify and standardize their geography-specific data.

ISO Data	Amp Object Label	Amp Object API Name
Country	Geographic Area	ampi_Geographical_Area__c

Region		
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IATI

The [International Aid Transparency Initiative \(IATI\)](#) is a campaign to improve the transparency of development aid and their humanitarian impact. While IATI relies on organizations' proactivity in aid and impact reporting, it also enforces a strict country coding in their reports so that geography-specific funds and results are easily monitored across IATI Activities and Organizations.

IATI Data	Amp Object Label	Amp Object API Name
Country	Geographic Area	ampi_Geographical_Area_c
Region		

ⓘ Admin Note:

The IATI Library can be used in conjunction with Amp Impact's IATI Reporting feature that went live in the Bellatrix (Fall 2019) release.

Feature Enhancements

Updates to Submissions

Several major enhancements to Submissions have been made in this release, including: Auto-saving submissions templates and paginating long forms.

Auto-save of Submission Templates

With this release, the "Save" button on the Template Builder will be deprecated, as any changes to the template will be automatically saved as they are made. (The "Save" button in the Add and Edit popups for Sections and Questions will still need to be clicked to create/update Section and Question records.)

Paginate Long Forms

To improve the user experience when filling out long forms, pagination is now supported in submission responses. While building out a template, users can determine on a Section whether it should start a new page for respondents. This will be indicated by a line in the Template Builder.

* Template Related To:
 Reporting Period ▼

TEMPLATE

Add New Section Add New Question

⋮	Please explain if others	Qualitative	✎ 🗑
---	--------------------------	-------------	---

New Page

Section Description			
⋮	Evaluation Findings		✎ 🗑
Question Description		Response Type	
⋮	What are the findings from evaluation?	Qualitative	✎ 🗑
⋮	Please indicate the number of evaluations conducted	Number	✎ 🗑

Manage Indicators: Define the number of decimal places for numeric indicators at the catalog level

Previously, the Number of Decimal Places field was set only at the Project level, such that it had to be defined and customized every time an indicator was added to a project. With this release, a new field (ampi__Number_Of_Decimal_Places__c) has been added to the Catalog Indicator object (ampi__Indicator__c) so that this can be defined at the catalog level and automatically pulled down to the project level.

Set Targets/Add Results: List Geographic Areas in alphabetical order in dropdown

In earlier versions of Amp, Geographic Areas would display in the dropdown picklist on Set Targets and Add Results according to the hierarchy, but in no discernable order at certain levels within the hierarchy. This has been updated so that the Geographic Areas will display both according to the hierarchy and alphabetically within a particular level in the hierarchy, for example:

- Bangladesh
- India
 - Gujarat
 - Karnataka
 - Maharashtra
 - Mumbai
 - Pune
- Nepal

Set Targets/Add Results Excel Upload: Uploaded ContentVersion appears in related list on Reporting Period

The ContentVersion record that is created when uploading targets or results on the Set Targets and Add Results page previously would be unattached to any record and only accessible through the Files tab in a Salesforce system. This has been updated so that the ContentVersion will appear as a File related to the parent Reporting Period and can be accessed through a related list on the parent record.

Aggregated Indicators: Use a date picker when setting filter criteria with a date field

When setting the aggregation criteria for a Project Indicator, the filter interface has been improved for date fields. If a date field is selected as a filter for the source data, instead of manually typing in a date value, users can directly select a date in a date picker.

of student attendance records where students completed their assignments

How to Aggregate	<input type="text" value="Count"/>		
Which records?	<input type="radio"/> All Records <input checked="" type="radio"/> Some Records		
Where	<input type="text" value="Date"/>	<input type="text" value="Greater than"/>	<input type="text" value="2/1/2021"/> <div style="float: right; text-align: right;"> <input type="text" value="2021"/> </div>
Do you need to de-duplicate?	<input type="radio"/> Yes <input checked="" type="radio"/> No		
Reporting Period based on	<input type="text" value="--None--"/>		
Geographic Area based on	<input type="text" value="--None--"/>		
Disaggregate based on (Age Group (Students))	<input type="text" value="--None--"/>		
	<5 years	<input type="text"/>	
	5-8 years	<input type="text"/>	
	8-11 years	<input type="text"/>	

February

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
21	22	23	24	25	26	27
28	1	2	3	4	5	6

Today

2021

Aggregated Indicators: Improved user experience with picklists in Aggregation Setting popup

Previously, when a user expanded a picklist in the Aggregation Setting popup, it would only remain expanded while the user hovered their cursor over the actual picklist. This created an inconsistent and inconvenient user experience, where the picklist would display as closed if the user moved their cursor away from the picklist. This has been improved such that the open state of picklists is maintained until the user either makes a selection in the picklist or clicks away to close the picklist.

Aggregated Indicators: Updated label for Record Type filter

In earlier versions, there was an inconsistency with the label of the Record Type filter, in which the label displayed "Record Type Id" but the filter accepted the Name value of the Record Type. This has been resolved so that the filter label is now Record Type Label and continues to accept the Name value of the Record Type.

Automation: Deactivate Project Indicator Deletion when Removing Related Project Thematic Areas

Two updates have been made to improve the user experience when managing Project Thematic Areas that are linked to required Project Indicators.

Triggers to delete/deactivate Project Indicators when a related Project Thematic Area is deleted are default inactive

With prior updates to sync Thematic Areas and Indicators when adding and removing Thematic Areas to Projects, a trigger was included that would, when a Thematic Area was removed from a Project, delete Project Indicator records that were required for that Thematic Area. This also then deleted related Result data.

Since this could cause unintended data loss, the trigger is now by default inactive. Note that this only affects new installs; existing users should manually deactivate the related trigger using the Dynamic Loader custom setting if they do not want this functionality.

When a Project Indicator is required for multiple Thematic Areas, only delete/deactivate the Project Indicator if all related Thematic Areas are removed from a Project

Previously, if an Indicator was marked as required (via Indicator Thematic Area) for multiple Thematic Areas and those Thematic Areas were added to a Project, then the Indicator would only be added to the Project once, as expected. However, if only one of those Thematic Areas was removed from the Project (i.e. Project Thematic Area is deleted), then the related Project Indicator would also be deleted or deactivated, even though it was still required for another Thematic Area.

This has been improved so that the Project Indicator is only deleted or deactivated if all the related Thematic Areas are removed from the Project.

Automation: Optimize Objective process to avoid governor limits

An earlier version of the Process that copied Catalog Objective field values into the fields on a related Project Indicator included each field update as a separate action in the process. This has been optimized so that all field updates are included in a single action that reduces the chance for a user to run into Salesforce's governor limits.

Setup: Define filter criteria for lookup fields via custom metadata type

Due to the limitation of native lookup filters not being respected in custom interfaces, this new release has introduced a new field on the Lookup Display Field custom metadata type to enable System Administrators to define filter criteria for lookup fields included in any of the popup or Excel upload field sets in Amp. These filter criteria are now respected on the Financial Excel Download/Upload component and Manage Frameworks Visualforce page; filter criteria on any other component is still hard-coded.

Disbursements: Improvements to Disbursements table

Several changes have been made to the Disbursements table to improve both the user and administrator experience.

Improvements to the field set and table columns

The Disbursement Table field set has been updated so that it includes more fields out of the box in the field set and in a more commonly used order. Full details for the updates to the field set can be found in the [Packaging Changes](#) section.

Additionally, hard coded fields have been removed and added to the field set, so that System Administrators can fully customize the field set per the organization's use case. Likewise, the first column will be hyperlinked such that a Disbursement record can be opened in a new tab directly from the table.

Display of field-type specific data in the table

Two updates have been made for specific field types to ensure that the user experience is consistent with native Salesforce.

1. Field type-specific symbols (e.g. currency symbol, percent symbol) now display in the table if the relevant field is included in the field set. Previously, only currency code would display.
2. Date locales now display according to the user locale so that it is consistent with Salesforce.

Fixed alignment of the table

Previously the columns were center-aligned, which would create a sub-optimal user experience depending on field label or field value length. This has been changed to left align column values, which also makes it consistent with the rest of Amp Impact.

Disbursements: Improved error handling

In earlier versions, the error handling for custom validation on the Disbursements page would display on the table itself, instead of within the Add/Edit Disbursement popups. This has been updated so that custom validation will display in the popup itself and prevent the user from closing the popup.

Manage Framework (Visualforce): Improved user experience - Freeze column headers while scrolling

In earlier versions of the Manage Framework page, when a user scrolled through the framework, the column header would scroll with the table, so the user would lose the context of the values in the table. This has been updated so that the column headers are frozen as the user scrolls through the table.

Resolved Issues

Manage Indicators (Lightning Web Component): Action(s) taken on other pages displays the Refresh Banner in Communities

In the last release, actions taken on certain pages (Manage Framework, Manage Indicator Visualforce page) would not generate the Refresh Banner on the Manage Indicators Lightning Web Component in Community Experience, which would then not inform the user if they needed to view updated data in the page. This has been updated so that the banner displays accurately based on data updates on all other components.

Manage Indicators (Lightning Web Component): Action dropdown no longer obscured by other components

Previously, if another component was dropped to the right of the Manage Indicators Lightning Web Component in a Lightning App, that component would obscure the action dropdown. This has been fixed so that the action dropdown displays on top of all components in the page and can be seen in full.

Manage Indicators (Lightning Web Component): URL fields supported

In the initial release of the Lightning Web Component, inputs to any custom URL field in the Add New Indicator or Customize Project Indicator popups would return an “invalid format” error, even if the entered value was in the correct URL format. This has been updated so that the error is no longer thrown incorrectly and that records are saved.

Manage Indicators (Lightning Web Component): Default order (Alphabetical by Indicator Definition Translated) used when indicator catalog table order = NULL

Previously, the Indicator Catalog would not have a default order if the Indicator Catalog Table Order on the Project was not populated. This was inconsistent with the Selected Indicators Table, which has a default order of alphabetically ascending by Indicator Definition (Translated) if no custom order has been defined, and created a confusing user experience as Catalog Indicators were ordered randomly. As a result, the default order for the Indicator Catalog has been set to also be alphabetically ascending by Indicator Definition (Translated), irrespective of the value in the Indicator Catalog Table Order field.

Manage Indicators (Visualforce and Lightning Web Component): Default value for Yellow/Green Threshold prints correctly as 100 in Customize Project Indicator Popup

With the addition of default values for the threshold fields in the last release, the default value for the Yellow/Green Threshold would incorrectly show as 1 while editing Project Indicators using either Manage Indicators interface. While the data saved correctly, it created an inconsistent user experience, as the Red/Yellow Threshold would display as 75. This has been resolved so that the Yellow/Green Threshold displays as 100.

Manage Indicators (Visualforce): Dynamic Search Filters order according to the field set

Previously, the Dynamic Search Filters on the Manage Indicators Visualforce page would sometimes display in an order inconsistent with the order defined in the filter field set. This has been resolved so that the filter fields are ordered as defined by the field set.

Aggregated/Calculated Indicators: Improved User Experience***User with limited permissions cannot run batches***

In earlier releases, if a user did not have the correct permissions to run batches (e.g. create/edit access to `ampi__Result__c`), they could still follow the steps to run the batch for Aggregated or Calculated Indicators, and it would even update the Last Aggregated Date or Last Calculated Date field, even though no Results would be generated/updated.

This has been resolved so that a user without sufficient permissions for running batches will be notified that they cannot run the batch, and the date fields are no longer updated.

Updated Indicator Definition displays in aggregation setting/calculation formula popup header

Previously, if the Indicator Definition was edited at the same time as the Type of Results value being toggled from Input to either Aggregated or Calculated, the header in the Aggregation Setting or Calculation Formula popup would display the earlier Indicator Definition value, instead of the edited one. This has been updated so that the popup header is synced with updates to the Indicator Definition field.

Calculated Indicators: Corrected Result Calculations for Percent Project Indicators

If a source Project Indicator’s data type was set as Percent and included in the formula of a calculated Project Indicator, then the resulting calculation would be incorrect, as it would calculate the whole number value of the Percent Indicator’s Results (e.g. Total number of persons [100] * Percentage of persons below 18 [20%] would result in a calculation of 2000 instead of 20).

This has been modified so that if a source Project Indicator contains percent data, the calculation will respect that and generate accurate results.

Calculated Indicators: Input box expands dynamically to accommodate formula length

In earlier versions, if a formula was created that expanded beyond the height of the input box, the input box would not re-render according to the formula’s size. This has been updated so that the input box dynamically expands when the formula exceeds the height of the box.

Calculation test

Use the below formula-builder to specify the calculation that should be performed to calculate Results for this project indicator.

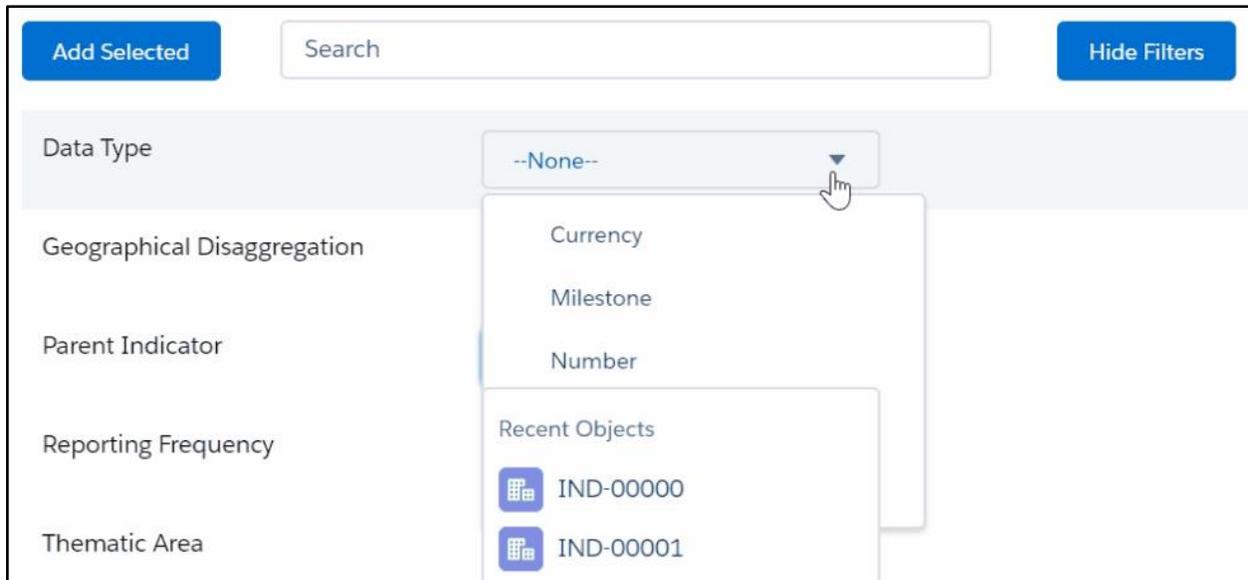
Calculation

$$\begin{aligned}
 & \text{Test Indicator - 001} \times + \text{Test Indicator - 002} \times * \text{Test Indicator - 003} \times / (\text{Test Indicator - 004} \times + \\
 & \text{Test Indicator - 005} \times) * \text{Test Indicator - 006} \times / \text{Test Indicator - 007} \times + (\text{Test Indicator - 008} \times * \\
 & \text{Test Indicator - 009} \times /
 \end{aligned}$$

Dynamic Search Filters: Improvements to User Interface

Dropdowns for Picklist and Lookup Filters No longer Overlap

In all Visualforce pages using Dynamic Search filters, picklist and lookup filters that were adjacent in the field set would overlap when clicking between the fields. This has been resolved so that only one filter will expand at a time and can be viewed/edited in isolation.



Dynamic Filters and QuickSearch Can Be Applied Together

Previously, the Dynamic Search Filters and QuickSearch could only be applied to a page separately. This has been improved so that both filter interfaces can be used in tandem, enabling users to provide more nuanced filter criteria for the different tables across the Visualforce pages.

Set Targets/Add Results Excel Upload: Indicator definitions order alphabetically in success and error logs

When uploading targets or results via Excel Upload and subsequently downloading the success or error logs, the Project Indicators would order by Created Date instead of by Indicator Definition. This has been resolved so that both logs order alphabetically by Indicator Definition, to be consistent with the actual Set Targets and Add Results Excel Download.

Add Results: Historical target values display correctly when toggling the Targets Are Disaggregated field value on a Disaggregated Project Indicator

In earlier releases, when Targets Are Disaggregated was changed from TRUE to FALSE for a Project Indicator that was disaggregated both by a custom disaggregation group and by sex, previously entered target values would not display consistently on the Add Results page, as the Total Target value and all Male Target values would be hidden. This has been fixed so that all historical target values continue to display on the page.

PROJECT INDICATOR	TOTAL		MALE		FEMALE
	TARGET	RESULT	TARGET	RESULT	TARGET
▾ __CDbySex__CustomDG__PI ?	171	171	117	117	231
Urban	154	117	99	<input type="text" value="99"/>	77 <input type="text" value="9"/>
Rural	154	27	9	<input type="text" value="9"/>	77 <input type="text" value="9"/>
Unknown	154	27	9	<input type="text" value="9"/>	77 <input type="text" value="9"/>

IATI: Resolved issues to pass validation while publishing

Several changes have been made to IATI publishing to ensure that the generated XML files pass IATI's validation process.

Correct value printed into @type attribute for transaction/provider-org and transaction/receiver-org elements in Activity XML

Previously, either no value or a label value would be printed into the *transaction/provider-org/@type* and *transaction/receiver-org/@type* elements in the IATI Activity XML. This has been updated so that the correct code value is printed into both of these elements.

Remove duplicated code in indicator/ref element if result/ref element is already printed

IATI requires a code printed into only either the *indicator/ref* element or the parent *result/ref* element in the IATI Activity XML. Earlier versions of Amp printed a code into both, which caused XML file to fail validation. This has been fixed so the code is conditionally printed into only one or the other, depending on how an organization wishes to report their result data.

IATI: User generates IATI XML containing only data they can access

Previously, if a user lacked access to certain objects (i.e. Budget, Financial) that would be printed into the IATI XML, they would still be able to successfully generate an XML file with that restricted data, bypassing any security constraints set by the System Administrator. This has been fixed so that if a user does not have access to certain objects/records, then they can still generate the XML, but it will only contain the data for which they have the correct permissions.

Submissions: URL can be entered in All Caps

Previously, the Template Builder would throw an error if a custom URL field was included in either the Add/Edit Question or Add/Edit Section popups, and the URL value was entered in all caps, even if the value was technically in the correct URL format. This has been resolved so that the capitalization of entered values is ignored, and Questions and Sections can be saved successfully with URL values.

Submissions: User Interface improvements in the Submission Template Preview

Picklist Dropdown

When previewing a Submission Template, a picklist question would display with two toggle arrows, where the top one was greyed out, but the bottom one was highlighted. Since picklist questions are not clickable in preview mode, this has been updated so that both are greyed out.

Multi-select Picklist Dropdown

Multi-select picklists in the Submission Template preview displayed inconsistently with picklists, as they were not greyed, even though they are not clickable. This has been updated so that they are also greyed out to indicate to the user that they cannot be modified.

Disbursements: Thousands separators display in popups

Previously, when a number value that exceeded 1,000 was entered into a numeric field in any of the Disbursement popups, it would display without the thousands separator (e.g. 120,000 would display as 120000). This has been improved so that thousands separators, based on user locale, are automatically added into the input box for numeric fields as the user enters data into that field.

Salesforce Winter '21 Release Compatibility

Salesforce's Winter '21 release introduced several changes that would affect Amp functionality. To ensure that the product continues working as expected, Amp Impact was updated to address the following updates to Salesforce:

- [Change Aura UI namespace components to Aura Lightning namespace elements](#)
- [BEM notation with double dashes is being deprecated](#)

Packaging Changes

New `ampi__xx_Activity_Dependency__c` object

1. New fields:

Field Label	Field API Name	Data Type
Preceding Activity	<code>ampi__xx_Preceding_Activity__c</code>	Lookup(<code>ampi__Activity__c</code>)
Succeeding Activity	<code>ampi__xx_Succeeding_Activity__c</code>	Lookup(<code>ampi__Activity__c</code>)

Type	ampi__xx_Type__c	Picklist
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2. New page layout: Activity Dependency Layout

New ampi__xx_Framework__c object

1. New fields:

Field Label	Field API Name	Data Type
Framework Name	Name	Text(80)
Description	ampi__xx_Description__c	Text Area(255)
Framework Locked	ampi__xx_Framework_Locked__c	Checkbox(default FALSE)
Project	ampi__xx_Project__c	Lookup(ampi__Project__c)
Reviewer Comments	ampi__xx_Reviewer_Comments__c	Text Area(255)
Status	ampi__xx_Status__c	Picklist

2. New page layout: Framework Layout

Changes to ampi__Project__c

Updated the formula for the following field on ampi__Project__c:

Field API Name	Original Formula	New Formula
ampi__IATI_Hierarchy__c	IF(ISBLANK(ampi__Parent_Project__c), 1, IF(ISBLANK(ampi__Parent_Project__r.ampi__Parent_Project__c),	IF(ISBLANK(ampi__Parent_Project__c), 1, IF(ISBLANK(ampi__Parent_Project__r.ampi__Parent_Project__c),

	<pre> 2, IF(ISBLANK(ampi__Parent_Project__r.ampi__Parent_Pr ject__c), 3, IF(ISBLANK(ampi__Parent_Project__r.ampi__Parent_Pr ject__r.ampi__Parent_Project__c), 4, IF(ISBLANK(ampi__Parent_Project__r.ampi__Parent_Pr ject__r.ampi__Parent_Project__r.ampi__Parent_Proj ect__c), 5, IF(ISBLANK(ampi__Parent_Project__r.ampi__Parent_Pr ject__r.ampi__Parent_Project__r.ampi__Parent_Proj ect__c), 6, IF(ISBLANK(ampi__Parent_Project__r.ampi__Parent_Pr ject__r.ampi__Parent_Project__r.ampi__Parent_Proj ect__r.ampi__Parent_Project__c), 7, IF(ISBLANK(ampi__Parent_Project__r.ampi__Parent_Pr ject__r.ampi__Parent_Project__r.ampi__Parent_Proj ect__r.ampi__Parent_Project__r.ampi__Parent_Proj ect__c), 8, IF(ISBLANK(ampi__Parent_Projec t__r.ampi__Parent_Project__r.ampi__Pa rent_Project__r.ampi__Parent_Project__ r.ampi__Parent_Project__r.ampi__Pare nt_Project__r.ampi__Parent_Project__r. ampi__Parent_Project__r.ampi__Parent _Project__c), 9, IF(ISBLANK(ampi__Parent_Projec </pre>	<pre> 2, IF(ISBLANK(ampi__Parent_Project__r.ampi__ Parent_Project__r.ampi__Parent_Project__c), 3, IF(ISBLANK(ampi__Parent_Project__r.ampi__ Parent_Project__r.ampi__Parent_Project__r .ampi__Parent_Project__c), 4, NULL)))) </pre>
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Project Count	Indicator	ampi__Project_Indicator_Count__c	[NOT IN USE] Number field to store the count of project indicators that are related to this Reporting Period record
Result Count		ampi__Result_Count__c	[NOT IN USE] Number field to store the count of Project Indicators related to this Reporting Period that have had Result data entered
Target Count		ampi__Target_Count__c	[NOT IN USE] Number field to store the count of Project Indicators related to this Reporting Period that have had Target data entered

Changes to ampi__Activity__c

1. New fields:

Field Label	Field API Name	Data Type
Percent Complete	ampi__Percent_Complete__c	Percent(3, 0)

2. Updated fields:

Field API Name	Data Type	Change
ampi__Status__c	Picklist	Set default value to "Planning"
ampi__Actual_Start_Date__c	Date	Updated help text to: "When the Actual Start Date is left blank, the popover on the actual timeline displays the Actual End Date in its place."
ampi__Actual_End_Date__c	Date	Updated help text to: "When the Actual End Date is left blank, the popover on the actual timeline displays the Actual Start Date in its place."
ampi__Planned_Start_Date__c	Date	Updated help text to: "When the Planned Start Date is left blank, the popover on the actual timeline displays the Planned End Date in its place."
ampi__Planned_End_Date__c	Date	Updated help text to: "When the Planned End Date is left blank, the popover on the actual timeline displays the Planned Start Date in its place."

3. Changes to field sets:

Field Set API Name	Usage	Change
ampi__ACTIVITY_INFO_POPOVER	Fields in popover that displays when hovering on Activity timeline	New field set
ampi__ACTIVITY_TABLE_SEARCH_FILTER	Search filters in Activity table	Added fields as available: <ul style="list-style-type: none"> • ampi__Actual_Start_Date__c • ampi__Actual_End_Date__c • ampi__Planned_Start_Date__c • ampi__Planned_End_Date__c Removed field: <ul style="list-style-type: none"> • ampi__Activity_Information__c
ampi__ACTIVITY_TABLE_COLUMNS	Detail columns in Activity table	Added field as available: <ul style="list-style-type: none"> • ampi__Implementation_Plan__c
ampi__CREATE_NEW_ACTIVITY_POPUP	Fields in popup to create a new Activity	Added field as available: <ul style="list-style-type: none"> • ampi__Percent_Complete__c Marked field as non-required: <ul style="list-style-type: none"> • ampi__Planned_Start_Date__c
ampi__EDIT_ACTIVITY_POPUP	Fields in popup to edit an Activity	Added field as available: <ul style="list-style-type: none"> • ampi__Percent_Complete__c Marked field as non-required: <ul style="list-style-type: none"> • ampi__Actual_Start_Date__c

4. Updated Activity page layout with new fields

Changes to `ampi_Catalog_Objective__c`

1. New fields:

Field Label	Field API Name	Data Type
Include In Catalog	<code>ampi__xx_Include_In_Catalog__c</code>	Checkbox (default FALSE)

2. Updated field sets:

Field Set API Name	Usage	Change
<code>ampi_ADD_NEW_OBJECTIVE_POPUP</code>	Fields in popup when creating a custom Framework Objective	Reordered fields: <ul style="list-style-type: none"> • Name moved to top of field set and marked as required Added field: <ul style="list-style-type: none"> • <code>ampi__xx_Include_In_Catalog__c</code>
<code>ampi_ADD_CATALOG_OBJECTIVE_POPUP</code>	Columns for table of catalog of objectives	New field set
<code>ampi_CATALOG_OBJECTIVE_SEARCH_FILTERS</code>	Search filters for table of catalog of objectives	New field set

3. Updated Objective page layout with new fields

Changes to `ampi_Objective__c`

1. This object has been relabeled to "Framework Objective".
2. New fields:

Field Label	Field API Name	Data Type
Framework	<code>ampi__xx_Framework__c</code>	Lookup(<code>ampi__xx_Framework__c</code>)
Project Indicator(s)	<code>ampi__xx_Project_Indicator__c</code>	Long Text Area(5000)
Project Indicator(s) Language 1	<code>ampi__xx_Project_Indicator_Language_1__c</code>	Long Text Area(50000)

Project Language 2	Indicator(s)	ampi__xx_Project_Indicator_Language_2__c	Long Text Area(50000)
Project Language 3	Indicator(s)	ampi__xx_Project_Indicator_Language_3__c	Long Text Area(50000)

3. Updated fields:

Field API Name	Data Type	Change
ampi__Parent_Project_Objective__c	Lookup(ampi__Objective__c)	Relabeled field to "Parent Framework Objective"

4. Updated field sets

Field Set API Name	Usage	Change
ampi__EDIT_PROJECT_OBJECTIVE	Fields in popup when editing a Framework Objective	Added field: <ul style="list-style-type: none"> • ampi__xx_Project_Indicator__c Marked as required: <ul style="list-style-type: none"> • ampi__Label__c

5. Updated Project Objective page layout with new fields

Changes to ampi__Budget__c

6. New fields:

Field Label	Field API Name	Data Type
Framework	ampi__xx_Framework__c	Lookup(ampi__xx_Framework__c)

7. Updated Budget page layout with new fields

Changes to `ampi__Implementation_Plan__c`

1. New fields:

Field Label	Field API Name	Data Type
Framework	<code>ampi__xx_Framework__c</code>	Lookup(<code>ampi__xx_Framework__c</code>)

2. Updated Implementation Plan page layout with new fields

Declarative Automation

Process Builder

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. See the Installation Guide for more guidance on customization.

Custom Metadata Types

Changes to `ampi__Object_Lookup_Label_Mapping__mdt`

1. New field:

Field Label	Field API Name	Data Type
Filter	<code>ampi__Filter__c</code>	Long Text Area(32768)

2. Updated Object Lookup Label Mapping page layout with new field

New Custom Metadata Type Records

The custom metadata type records listed below are created on `ampi__Object_Lookup_Label_Mapping__mdt`:

1. `Activity_Project_Objective`
 - a. Child Object Name: `ampi__Activity__c`
 - b. Lookup Field Name: `ampi__Project_Objective__c`
 - c. Parent Object Name: `ampi__Objective__c`
 - d. Label Field API Name: `ampi__Label_Translated__c`
 - e. Lookup Filter: `"label": "ampi__Project__c","operator": "equals","value": "ampi__Implementation_Plan__r.ampi__Project__c"`
2. `Activity_Project_Indicator`
 - a. Child Object Name: `ampi__Activity__c`
 - b. Lookup Field Name: `ampi__Project_Indicator__c`
 - c. Parent Object Name: `ampi__Project_Indicator__c`
 - d. Label Field API Name: `ampi__Description_Translated__c`
 - e. Lookup Filter: `"label": "ampi__Project__c","operator": "equals","value": "ampi__Implementation_Plan__r.ampi__Project__c"`
3. `Activity_Parent_Activity`
 - a. Child Object Name: `ampi__Activity__c`
 - b. Lookup Field Name: `ampi__Activity__c`
 - c. Parent Object Name: `ampi__Parent_Activity__c`
 - d. Label Field API Name: Name
 - e. Lookup Filter: `"label": "ampi__Implementation_Plan__c","operator": "equals","value": "ampi__Implementation_Plan__c"`

Custom Settings

Changes to `ampi__Activities__c`

New fields:

Field Label	Field API Name	Data Type
Hide Display Baseline Button	<code>ampi__Hide_Display_Baseline_Button__c</code>	Checkbox
Hide Delete Actions	<code>ampi__Hide_Delete_Icon__c</code>	Checkbox
Hide Display Critical Path Button	<code>ampi__Hide_Display_Critical_Path_Button__c</code>	Checkbox

Hide Edit Actions	ampi__Hide_Edit_Icon__c	Checkbox
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Custom Labels

New Custom Labels

API Name	Categories	Value	Function
ACTIVITY_DELETE	Activities, Toast, Amp Impact	Delete Activity	Header label for Delete Activity popup
ACTIVITY_TABLE_VIEW_BY_MONTH	Activities, Interface, Amp Impact	View By Month	Button label to toggle timeline view
ACTIVITY_TABLE_VIEW_BY_WEEK	Activities, Interface, Amp Impact	View By Week	Button label to toggle timeline view
ACTIVITY_TABLE_VIEW_BY_YEAR	Activities, Interface, Amp Impact	View By Year	Button label to toggle timeline view
ADD_CATALOG_OBJECTIVE	ManageFramework, Interface, Amp Impact	Add Objective from Catalog	Button label to open popup with catalog of objectives
ADD_OBJECTIVE	ManageLogFrames LWC	Add Objective	
ADD_SELECTED_OBJECTIVES_BUTTON	ManageLogFrames LWC	Add Selected	Button label to add objectives selected from the catalog
DELETE_LINK_MODAL_HEADER	Activity, Amp Impact	Delete Link	Header label for the popup to delete an activity dependency
DELETE_LINK_MODAL_TEXT	Activity, Amp Impact	Are you sure you want to delete this dependency?	Text for the body of the popup to delete an activity dependency
FRAMEWORK_STATUS_SUBMITTED	ManageLogFrames	Submitted	Label to show that a Framework is Submitted
HIDE_BASELINE	Activities, Interface, Amp Impact	Hide Baseline	Button label to hide baseline from timeline
HIDE_CRITICAL_PATH	Activities, Interface, Amp Impact	Hide Critical Path	Button label to hide critical path from timeline
NO_CATALOG_OBJECTIVE_RECORDS	ManageLogFrames LWC	No Catalog objectives found to link	Error message to indicate when no objectives are in the catalog
SELECT_OBJECTIVE_COLUMN	ManageLogFrames LWC	Select	Header for column of checkboxes in Catalog of Objectives
SUBMIT_FRAMEWORK	ManageLogFrames	Submit For Approval	Button label to submit Framework

SUBMIT_FRAMEWORK_POPOPUP_HEADER	ManageLogFrames	Confirm	Header label for confirmation popup to submit Framework
SUBMIT_FRAMEWORK_POPOPUP_TEXT	ManageLogFrames	Confirm if you would like to submit your framework. Once your framework is submitted, it can no longer be modified.	Body text for confirmation popup to submit Framework
TOTAL_RECORDS_SELECTED	Framework, Amp Impact	Total Records Selected:	Text displayed ahead of pill indicating the number of records selected to be added in the Catalog of Objectives

Updated Custom Labels

API Name	Categories	Value	Function
ADD_NEW_OBJECTIVE_BUTTON	ManageFramework, Interface, Amp Impact	Add Custom Framework Objective	Add Custom Framework Objective button
ADD_NEW_OBJECTIVE_POPOPUP_HEADER	ManageFramework, Add New Objective popup, Amp Impact	Add Custom Framework Objective	Header in Add Custom Framework Objective popup
EDIT_FRAMEWORK_ITEM_MODAL_HEADER	ManageFramework, Edit Framework Item popup, Amp Impact	Edit Framework Objective	Header for Edit Framework Objective popup on ManageLogframes
NO_PROJECT_OBJECTIVES_FOUND	ManageFramework, Interface, Amp Impact	No Framework Objectives have been added to this Framework	Notification message for ManageFramework

Portuguese (Brazil) Translation

Labels in Amp Impact that have been added since Aquila are now available to be used in Portuguese. Refer to the Multi Language Capability Setup Guide to set up users to use Amp in Portuguese.