Installation Guide

July 2018

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Installation

The following installation and configuration instructions are updated as of July 2018 - covering all releases of Amp Impact

Latest release Version Name: Summer II 2018 | Version Number: 1.199

1. Install Amp Impact into a developer environment or sandbox using the installation link provided below.
   - o Select which users you wish to install the package for
   - o Click "Install"
2. Configure user, security, and app settings as required for your specific use-case (see [Configuration" section](#))
3. Consult the ["Get Started" section](#) on how to get started with using Amp Impact

4. Perform your current use cases in the sandbox and ensure that they are operating as expected.

5. When you are ready to deploy to production, use the installation link below.

6. Update your custom settings in Production as these will not "carry over" from your sandbox.

Installation Links:

Sandbox:
[https://test.salesforce.com/packaging/installPackage.apexp?p0=04t460000006P76https://test.salesforce.com/packaging/installPackage.apexp?p0=04t460000006P76](https://test.salesforce.com/packaging/installPackage.apexp?p0=04t460000006P76)

Production:
[https://login.salesforce.com/packaging/installPackage.apexp?p0=04t460000006P76https://login.salesforce.com/packaging/installPackage.apexp?p0=04t460000006P76](https://login.salesforce.com/packaging/installPackage.apexp?p0=04t460000006P76)

Configuration

1. System Administration and Setup

Set up My Domain

In order to use any of the custom Lightning Components in Amp, My Domain will need to be enabled and set up in the org. System Admins can set up My Domain and create a custom Salesforce domain for the organization through the Setup menu.

Enable Streaming API for the org

Streaming API must be enabled in your Salesforce org to use *Aggregated and Calculated Indicators* functionality. System Admins can enable Streaming API following these steps:

1. Open Setup
2. Use the Quick Find search to find and open User Interface

3. Scroll to the Setup section of User Interface
4. Make sure that 'Enable Streaming API' is selected
5. Click Save

Enable Path

For Lightning pages in Amp to correctly display the Path component, Path must be enabled in the Salesforce org. System Admins can enable Path by following these steps:

1. Open Setup
2. User the Quick Find search to find and open Path Settings
3. Click the Enable button
4. (Optional) Edit the Amp Paths as needed:
   a. *Project Status* - This Path is used on the Project Lightning record page, and its display depends on the value in the ampi__Project_Status__c field on ampi__Project__c.
   b. *Submission Status* - This Path is used on the Submission Response and Submission Review Lightning record pages, and its display depends on the value

in the ampi__Status__c field on ampi__Submission__c. By default, it is assigned to the Submission Record Type.

2. Basic User Administration and Permission Sets

System Settings for Users who will be using Amp Impact

System Settings in Permission Sets are not enabled by default.

- Go to the Setup Quick Search box, and enter "Permission Sets"

- Click "New" to create a new Permission Set

- Set the label as "Amp Impact System Permissions", and the API name should automatically render as Amp_Impact_System_Permissions

- (Recommended) Leave Section Activation Required? checkbox and License picklist blank

- Click *Save* to create the Permission Set

- After savings, scroll down and click "System Permissions"

- Select the following System Permissions as TRUE:

☐ The following list can be customized based on what the User(s) needs to access in regards to Reports & Dashboards and running Apex batches for Aggregated or Calculated Indicators.

- ○ API Enabled
- ○ Create and Customize Dashboards
- ○ Create and Customize Reports
- ○ Create Dashboard Folders
- ○ Create Report Folders
- ○ Drag-and-Drop Dashboard Builder
- ○ Edit My Dashboards

○ Edit My Reports

○ Export Reports

○ Manage Dynamic Dashboards

○ Report Builder

○ Run Reports

○ View My Team's Dashboards

Access for Users who need *full* access to Amp Impact Objects

After installing Amp Impact, follow these steps to ensure your Users with Admin rights for Amp Impact have access to the Amp Impact Admin permission set.

● Go to the Setup Quick Search box, and enter "Users"

● For the user(s) with the profile that should have access to the *Amp Impact Admin* permission set, click on their Full Name

● This opens up that user's profile. Go to "Permission Set Assignments" and click on "Edit Assignments"

● From the available permission sets, enable "Amp Impact Admin" and Save.

● For any users that will need full access to Amp Impact, including setup and customization, repeat the above four steps with each user.

Access for Users who need *limited* access to Amp Impact Objects

For other Amp Impact app users who are using the tool for data entry, for example, create a new permission set to grant them limited access.

● To do this, either follow the same steps as above or navigate to Setup > Permission Sets and select 'Manage Assignments'.

● If specific permission requirements are determined during configuration (e.g., restriction of certain edit privileges), System Admin may need to modify/clone this permission set or modify user permissions on an individual profile level to achieve these requirements.

- System Admin may also potentially need to customize Nav Bar permissions (see next section in guide) or consider removing certain buttons (e.g., "Manage Indicators") from page layouts assigned to specific profiles in order to restrict points of Amp Impact data entry.
- Additionally, certain permission and sharing setups (i.e., restricting "create" access for certain objects for some user groups, make individual tabs available but not the entire app) may require the System Admin to make additional changes to existing user permission & record sharing setup leveraging the standard Salesforce platform security & sharing features.
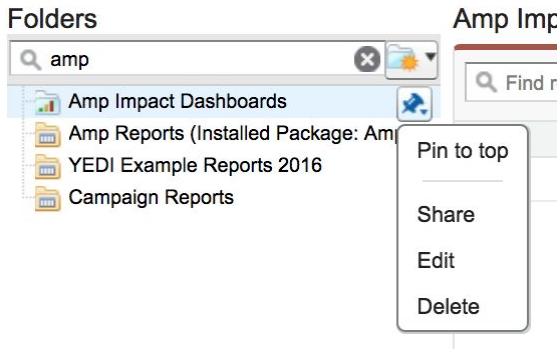
☐ The Amp Impact Admin permission set does not contain permissions to either the Project Role or Organization Role objects, as permission sets in managed packages cannot provide access to custom objects that are detail to standard Salesforce objects in a master-detail relationship.

To provide access to either of these objects, create a new permission set (or modify an existing unmanaged permission set) and add both the object and field permissions manually through Object Settings. Assign this new permission set to any users who require access to Project Role and Organization Role.
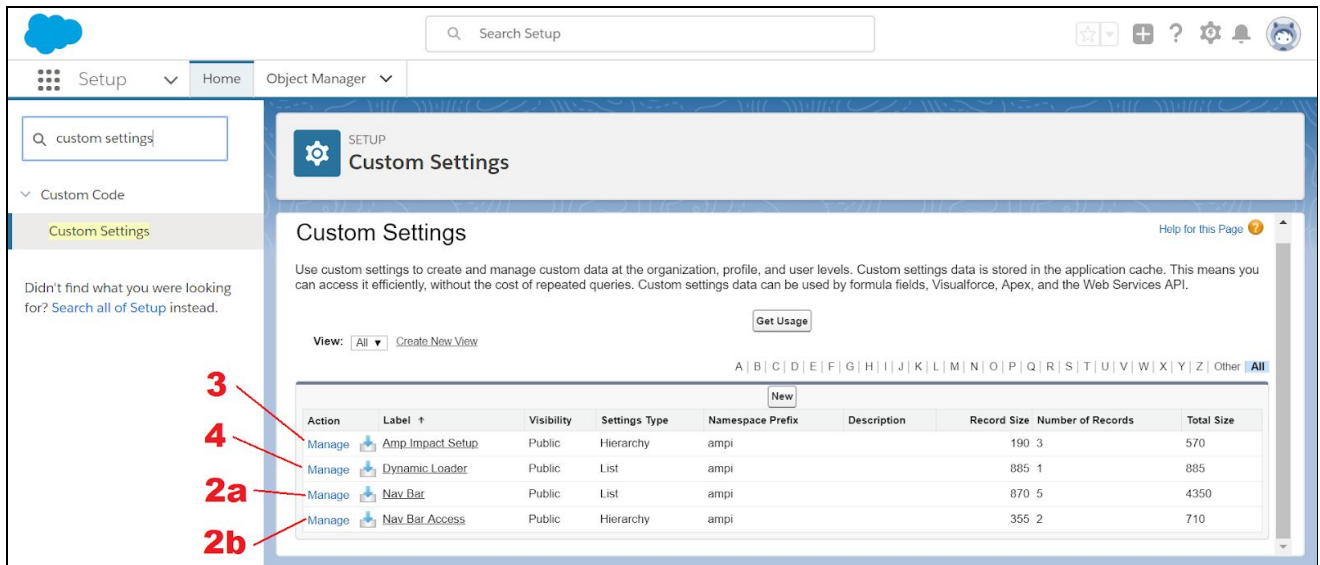
Reports Access: Vera has also set up a report folder - **Amp Reports**. Share this folder in order to grant users view/edit/manage access to the report content, or create and share new report folders.

To share the folder with other users, select the pin next to the folder name and select 'Share'. Then share with desired users.

Custom Settings: The image below shows how to access and customize the custom settings details in the following **Steps 3-5**.

3. Salesforce <u>Classic</u>: Set-up Navigation Bar and determine Access

☐ Organizations whose end users are on Salesforce Lightning <u>do not</u> need to set this Navigation Bar and can move to Section 3.

The Navigation Bar allows users to navigate to and between features of Amp Impact. To set up the required Tabs in the Navigation Bar, the admin will have to create a Custom Setting record for each Visualforce page that will be used and navigated to.

a. **Create a custom setting for the Navigation Bar labels and links to the relevant pages.** Use this spreadsheet to upload the Tabs or follow the steps below.

- Go to the Setup Quick Search box, and enter "Custom Settings"
- Go to Custom Settings and click on "Manage" next to the "Nav Bar" label.
- Click "New" and create the following, per your organization's use of Amp Impact.

Definitions

Name[1]: Text that displays in the Navigation Bar tab - can be customized per organization's terminology (e.g. 'Track Metrics' instead of 'Add Results')

Page API Name[2]: URL to hyperlink in the tab

Parameters: This can be left blank for all records.

Title[1]: Text that displays on cursor hover over the Navigation Bar tab - can be customized per organization's use case (e.g. 'Visualize' instead of 'Performance Graphs')

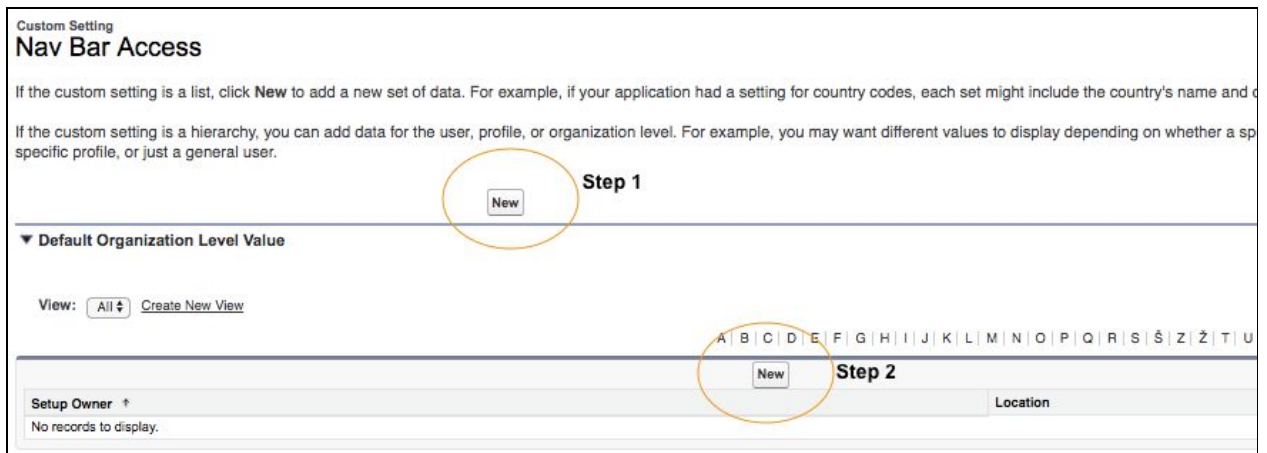Unique Key[2]: Short string with a letter code

Visualforce Page	Name[1]	Page API Name[2]	Title[1]	Unique Key[2]
Project	Project	/apex/ampi__project	Project	proj
ManageLogframe	Manage Framework	/apex/ampi__managelogframes	Manage Framework	mf
ManageIndicators	Manage Indicators	/apex/ampi__manageindicators	Manage Indicators	mi
SetTargets	Set Targets	/apex/ampi__settargets	Set Targets	st
AddResults	Add Results	/apex/ampi__addresults	Add Results	ar
PerformanceGraph	Performance Graphs	/apex/ampi__performancegraph	Performance Graphs	pg
ManageDisbursements	Manage Disbursements	/apex/ampi__managedisbursements	Manage Disbursements	md

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[1] Both Name and Title can be customized to the organization's use case. The values provided in the table are the sample values that can be used, based on the Visualforce page names.

[2] Page API Name and Unique Key are static values that need to be inputted for the Nav Bar to function correctly.

b. Navigation Bar Access: This is used to customize the Navigation Bar for different users e.g. Community vs. Client-organization users.

To display any part of the Navigation Bar for a certain profile or user, the admin must create a "Nav Bar Access" record for that profile or user. The admin can set a default view of the Navigation Bar for the entire organization using the Default Organization Level Value.

- Go to Custom Settings and click on "Manage" next to the "Nav Bar Access" label.
- Create a Default Organizational Level Value
    - o Click on the "New" button - as displayed on Step 1 in the image above
    - o In the "Available Nav Bar Items" field, enter the Unique Key for all pages that should appear on the Nav Bar. (For example, if all pages should be accessible through the Nav Bar, enter 'proj, mf, mi, st, ar, pg, md'.) For a list of the Unique Keys, look at the table on the previous page.
    - o The tabs are displayed in the order in which the Unique Keys are entered.
- Create a System Admin profile
    - o Click on the "New" button - as displayed on Step 2 in the image above

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- o In the "Location" field, select "Profile" from the dropdown menu and find System Administrator in the lookup

- o In the "Available Nav Bar Items" field, enter the Unique Key for all pages that should appear on the Nav Bar.

- o The tabs are displayed in the order in which the Unique Keys are entered

- To customize for certain profiles or users, the admin must first locate the profile/user they want to create a custom Navigation Bar view for in the Location field. Then, the admin must enter a comma-separated list of the Unique Keys of the relevant Visualforce pages, in the order in which they want the tabs for those pages to appear in the Available Nav Bar Items field.

  - o For example, as an admin, I want my Community Users to only view the Project, AddResults, and PerformanceGraph pages, so I create a new Nav Bar Access record with the following information:

    - ▪ Location field: select "Profile" and locate 'Community'

    - ▪ Available Nav Bar Items field: enter "proj,ar,pg"

4. Enable/Disable Features using Amp Impact Setup

Some key features in the product can be configured on/off depending on the client organization's preferences for the product. To enable or disable any of these features:

1. Go to Custom Settings and click on "Manage" next to the "Amp Impact Setup" label.

2. Create a Default Organizational Level Value and check the box (select TRUE) for the features your organization wants enabled. This will be the default for all users/profiles in the organization.

3. In addition, you can create Setup preferences for specific users and profiles. .

Amp Impact comes with the following features that can be enabled/disabled as needed at the user, profile, and organization level:

1. Allow Targets Column Download?
   a. Component: *Download* button on AddResults page
   b. UX if TRUE: Targets and Results download into the same Excel file on click of the Download button
   c. UX if FALSE: Only Results download into the Excel file on click of the Download button.
2. Chatter Enabled For Add Results?
   a. Component: AddResults page
   b. UX if TRUE: Chatter feed displays at the top of the AddResults page.
   c. UX if FALSE: Chatter feed does not display at the top of the AddResults page.
3. Chatter Enabled For Manage Indicators?
   a. Component: ManageIndicators page
   b. UX if TRUE: Chatter feed displays at the top of the ManageIndicators page.
   c. UX if FALSE: Chatter feed does not display at the top of the ManageIndicators page.
4. Chatter Enabled For Set Targets?
   a. Component: SetTargets page

b.   UX if TRUE: Chatter feed displays at the top of the SetTargets page.

c.   UX if FALSE: Chatter feed does not display at the top of the SetTargets page.

5. Document Upload Enabled?

a.   Component: *Attach* button on AddResults page

b.   UX if TRUE: Attach button displays on AddResults page. On click of Attach, document upload interface appears.

c.   UX if FALSE: Attach button does not display on AddResults.

6. Stop Light Enabled?

a.   Component: Total column in table on AddResults page

b.   UX if TRUE: Red/yellow/green stoplight appears in Total Column for each numeric (Currency, Number, Percent) ampi__Project_Indicator__c that has the following fields populated:

   i.   ampi__Aim__c field on ampi__Project_Indicator__c record

   ii.   ampi__Red_Yellow_Threshold__c field on ampi__Project_Indicator__c record

   iii. ampi__Yellow_Green_Threshold__c field on ampi__Project_Indicator__c record

   iv.   Relevant Target fields on ampi__Result__c record

   v.   Relevant Result fields on ampi_Result__c record

c.   UX if FALSE: Stoplight does not appear in Total Column.

7. Submit Results for Review Enabled?

a.   Component: *Submit* button on AddResults page

b.   UX if TRUE: Submit button displays on AddResults page. On click of Submit, results submission interface appears.

c.   UX if FALSE: Submit button does not display on AddResults page.

8. Submit Targets for Review Enabled?

a.   Component: *Submit* button on SetTargets page

b.   UX if TRUE: Submit button displays on SetTargets page. On click of Submit, targets submission interface appears.

c.   UX if FALSE: Submit button does not display on SetTargets page.

9. Validation Range Enabled?

a. Component: Input fields on SetTargets and AddResults pages
b. UX if TRUE: SetTargets and AddResults pages flag a user if the value entered in the input field is outside of the validation range set by the following fields on ampi__Project_Indicator__c:
    i. ampi__Validation_Range_Minimum__c
    ii. ampi__Validation_Range_Maximum__c
c. UX if FALSE: SetTargets and AddResults pages will not flag a user based on the value entered in the input field, irrespective of any values in the Validation Range fields.

If you enable some of the features above, review additional information about them:

Document Upload Enabled?

Use case: This feature allows users to upload supporting documents when reporting on the Add Results page for each reporting period

The "Document Upload Enabled?" custom setting allows admins to control if the Add Results page shows users the option to upload documents for a specific reporting period.

- Enabling the feature will display an icon and button titled "Attach" on the Add Results page. The button label can be edited/customized in the UPLOAD_DOCUMENTS custom label.
- If you enable this feature, also add the Documents_Required_for_RP__c field to the Reporting Period object page layout. This field lets admins specify what documents they want uploaded for the particular reporting period. This field is always displayed on the pop-up that opens when a user clicks on the "Attach" button on the Add Results page.

Validation Ranges Enabled?

Use case: This feature allows a user creating a Project Indicator to specify a range of expected values on the Manage Indicators page. The Set Targets and Add Results pages will be updated to live-check each value that is entered (on change of the input) to flag if an entered value falls outside the range of expected values.

- The "Validation Range Enabled?" custom setting allows admins to have control if the STAR pages show live error checking using a minimum and maximum value for each project indicator

- If you enable this feature, add the "Validation_Range_Minimum__c" and "Validation_Range_Maximum__c" fields to the relevant field sets[3] (see *Customize Field Sets* section below)

  o If the setting is enabled but there are no values in the two fields above, the live error checking will not work

  o If the setting is disabled then even if values exist in the two fields, the live error checking will not work

Stop Light Enabled?

Use case: This feature allows the organization to set up red, yellow, and green icons to appear next to results to give a quick snapshot of whether a target was achieved or not.

The "Stop Light Enabled?" custom setting allows admin to control if the Add Results pages display a performance stoplight for project indicators where an Aim field value has been indicated and the Threshold values have been set.

- If you enable this feature, add the "Red_Yellow_Threshold__c" and "Yellow_Green_Threshold__c" fields to the relevant field sets[4] (see *Customize Field Sets* section below)
  - If the setting is enabled but there are no values in both the Threshold fields, a stoplight will not show on the Add Results page
  - If the setting is disabled, then even if values exists in the Threshold fields, a stoplight will not show on the Add Results page

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[3] Field sets can only be customized in Salesforce Classic.

[4] Field sets can only be customized in Salesforce Classic.

Allow Targets Column Download?
- The Excel Download feature displays on the STAR pages with an icon and button titled "Download" on the Set Targets and Add Results pages. The button label can be edited/customized in the DOWNLOAD_EXCEL_BUTTON custom label.
  - o Clicking on the button downloads a formatted Excel file for a given Project, Geographic Area and Reporting Period on the Set Targets and Add Results pages, containing cells for associated Result records
    - ▪ The Excel file will not include any Result records that are associated with a Project Indicator that has been deactivated. This data can be accessed through native Salesforce from the record for the individual Project Indicator and/or using the "Deactivated Indicators Historic Data" report (available in the Amp Reports folder).
  - o In addition to the "indicator description", "disaggregation value" and target/results data, all other data displayed is dependent on the fields selected in the Add Results indicator info popover and Set Targets indicator info popover field sets on the Project_Indicator__c object
- The "Allow Targets Column Download?" custom setting enables users to select if they want to download target data with results data on the Add Results page or results data only
  - o If the setting is enabled, then both targets and results data will download
  - o If the setting is disabled, then only results data will download

5. Enable/Disable Excel Upload & Customize Upload Instructions

The Set Targets and Add Results pages can be additionally customized through the 'SetTargets' and 'AddResults' custom settings for those pages. The 'Upload' button can be either displayed or hidden through these custom settings, by checking or unchecking 'Excel Upload Enabled?'

When a user downloads an Excel template from Set Targets or Add Results, they are given a set of instructions on how to properly set up the Excel sheet for upload. For any additional custom

instructions that may be needed for your organization, use these custom labels to add further steps to the sections of the instructions sheet:

- UNDERSTANDING_THE_DOWNLOADED_EXCEL_CUSTOM
- PREPARE_EXCEL_FOR_UPLOAD_CUSTOM
- UPLOAD_EXCEL_INSTRUCTIONS_CUSTOM

6. Set up Dynamic Loader

On installing Amp Impact, a post-install script will run and all of the triggers built in Amp Impact will automatically be installed and activated as Dynamic Loader custom setting records in the Salesforce org when the package upgrade is installed.

Admins can customize (i.e. change the order, deactivate) the triggers by opening and editing each Dynamic Loader custom setting record. As an Admin, you can control which Triggers from the Amp Impact action schema (review this in your Field Map document) you would like to enable. For example, if your organization does not use Thematic Areas, you could choose to deactivate the Triggers on the following objects: ampi__Thematic_Area__c, ampi__Project_Thematic_Area__c, and ampi__Project_Indicator_Thematic_Area__c.

You can also control if your users should be able to download an Excel file from the SetTargets and AddResults pages through the Dynamic Loader custom setting.

7. Customize Field Sets[5]

Amp Impact uses field sets for users to add/remove fields and customize the product's features per client needs. Each field set has a list of available fields that users can choose to use. Some fields in the field set are already selected to display on installing the product. The other available

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[5] Field Sets can only be customized in Salesforce Classic.

fields can be added for usage, if appropriate. In addition, users can create custom fields on the relevant object and add these to the field set as well.

- **Manage Framework Visualforce page**
  - Fields displayed in the "Add New Framework Item" pop-up
    - Object: Catalog_Objective__c
    - Field set name: ADD_NEW_OBJECTIVE_POPUP
  - Column fields on the VF page - fields on the Project Objective object available to be displayed as column headers on this page
    - Object: Objective__c

- ■ Field set name: LOG_FRAMES_TABLE
  - ○ Column fields on the VF page - fields on the Project Indicator object available to be displayed as column headers on this page
    - ■ Object: Project_Indicator_Objective__c
    - ■ Field set name: LOG_FRAMES_TABLE

- **Manage Indicators Visualforce page**
  - ○ Column fields on the Catalog Indicators Table
    - ■ Object: Indicator__c
    - ■ Field set name: CATALOG_INDICATORS_TABLE
  - ○ Add New Indicator pop-up
    - ■ Object: Indicator__c
    - ■ Field set name: ADD_NEW_INDICATOR_POPUP
  - ○ Column fields for the Selected Project Indicators Table
    - ■ Object: Project_Indicator__c
    - ■ Field set name: SELECTED_PROJECT_INDICATORS_TABLE
  - ○ Edit project indicator pop-up
    - ■ Object: Project_Indicator__c
    - ■ Field set name: EDIT_PROJECT_INDICATOR_POPUP
  - ○ Column fields for the Deactivated Indicators Table
    - ■ Object: Project_Indicator__c
    - ■ Field set name: DEACTIVATED_PROJECT_INDICATORS_TABLE

- **Set Targets Visualforce page**
  - ○ Indicator info popover displayed by hovering on the "info icon"
    - ■ Object: Project_Indicator__c
    - ■ Field set name: SET_TARGETS_INFO_POPOVER

- **Add Results Visualforce page**
  - ○ Indicator info popover displayed by hovering on the "info icon"
    - ■ Object: Project_Indicator__c

■ Field set name: ADD_RESULTS_INFO_POPOVER

● **Manage Disbursements Visualforce page**
  ○ Project Summary - fields displayed in the Project Summary section
    ■ Object: Project__c
    ■ Field set: PROJECT_SUMMARY

> ☐ Add/Edit Disbursement pop-ups fields are controlled by two field sets - one on the Disbursement__c object and Reporting_Period__c object. This allows users additional flexibility to determine which fields are relevant for their use of the feature.

  ○ Add/Edit Disbursement pop-ups - fields displayed on the 'Add New Disbursement' pop-up and the 'Edit Disbursement' pop-up
    ■ Object: Disbursement__c
    ■ Field set: ADD_EDIT_POPUP
    ■ <u>Note</u>: Add the Reporting_Period__c lookup field in order to display the fields in the ADD_EDIT_POPUP on Reporting_Period__c
  ○ Add/Edit Disbursement pop-ups - Reporting Period fields displayed on the 'Add New Disbursement' pop-up and the 'Edit Disbursement' pop-up
    ■ Object: Reporting_Period__c
    ■ Field set: ADD_EDIT_POPUP
    ■ <u>Note</u>: Fields in this field set are only displayed if the Reporting_Period__c field is added to the ADD_EDIT_POPUP on the Disbursement__c object

● **Submission Lightning Components**
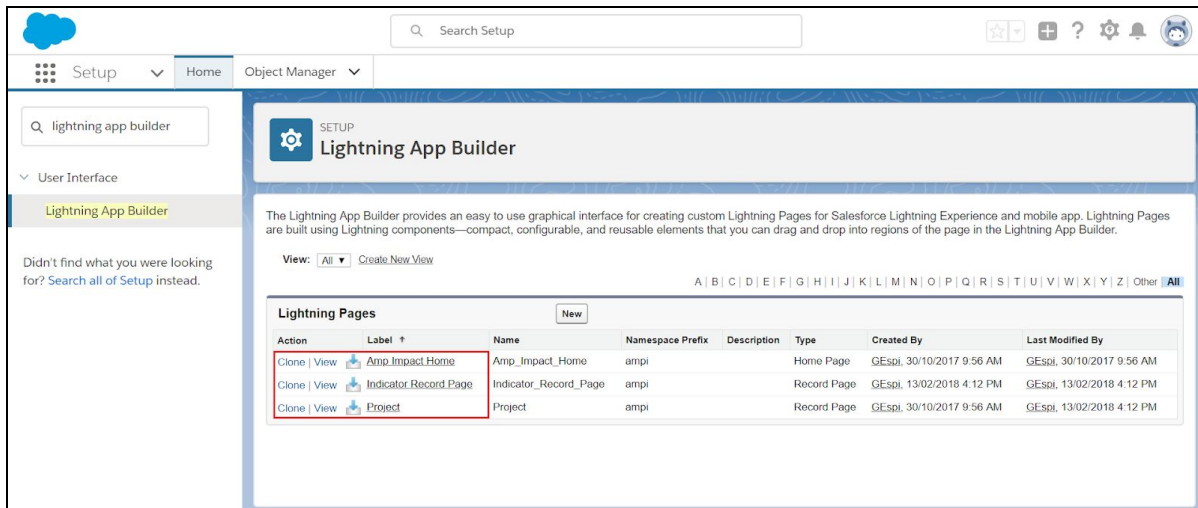
> ☐ The field sets listed below can only be customized using fields from the Amp Impact data model (i.e. fields included in the package - see the field map for more details). Fields that have been custom configured on the Section and Question objects cannot be added to these field sets, or the components will break due to a Salesforce platform limitation for Lightning Components.

- Add/Edit Section pop-ups - fields displayed on the 'Add New Section' pop-up and the 'Edit Section' pop-up
  - Object: Section__c
  - Field set: Add_Edit_Section_Popup
- Add/Edit Question pop-ups - fields displayed on the 'Add New Question' pop-up and the 'Edit Question' pop-up
  - Object: Question__c
  - Field set: Add_Edit_Question_Popup

8. Display Lightning Pages

Amp Impact includes 29 Lightning pages in the package: a Home page and a record page for many of the custom Amp Impact objects.
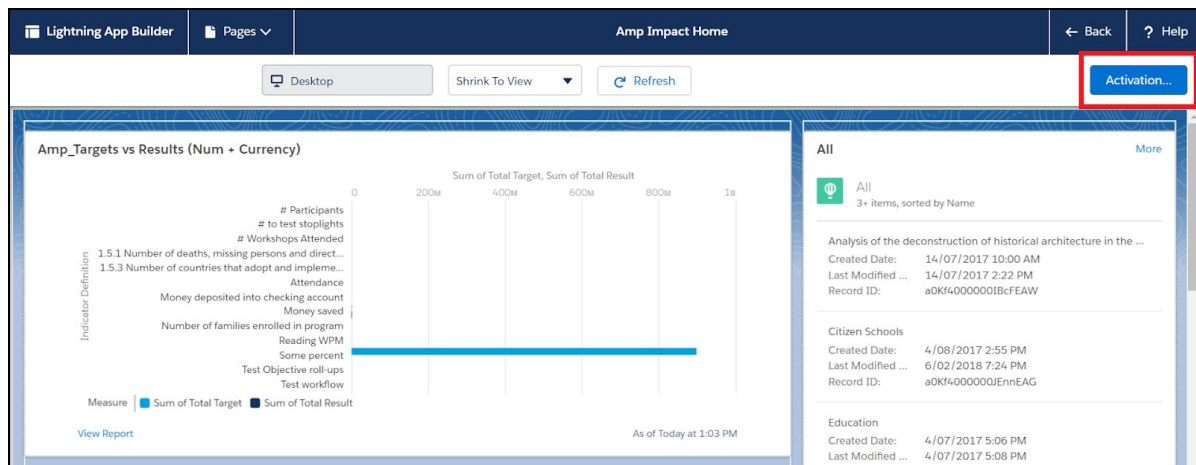

If your organization is already on Lightning and using custom Lightning pages, the Amp Home Lightning page will not display automatically if your custom Lightning Home page is activated

as the org default. Likewise, Amp's Project Lightning record pages will not display if your organization's custom Lightning record page is set as the org default.

To display any of Amp's Lightning pages, you will need to adjust the Activation settings either on your custom Lightning pages by removing them as the org or app default, or on the Amp Lightning pages by setting them as the app / profile defaults. You can access the Activation settings in the Lightning App Builder.

9. Translating Terminology and Labels

An organization may choose to customize Amp Impact to match the specific terminology users are familiar with. See *User Guide* for a glossary and definitions. To modify this terminology, re-translate existing customizations by following the below steps.

Translate Field Labels

- Navigate to Setup > Translation Workbench > Override
- Select 'Amp Impact' Package and 'English Language
- Select the Components to translate (Custom Field) and then the relevant object(s)

- Choose the Aspect 'Field Label' to update field labels and 'Related List' to update the labels displayed on related lists on a record detail page
- Then edit the field label override to update the translation/ terminology

Translate Tabs

- Navigate to Setup > Rename Tabs and Labels
- Select the relevant object name (e.g., Project)
- Then edit the field label override to update the translation/ terminology (e.g., Project → Investee)

Translate Labels in VisualForce Pages and Lightning Components

Select labels are referenced in Visualforce Pages and Lightning Components. To update these labels, you may need to also update corresponding custom labels. To do so:

- Navigate to Setup > Custom Labels
- Select the relevant custom label. ***Note*** that labels that reference "STAR" in the description are referenced in the Visualforce Pages (e.g., 'Available Thematic Area' in the Set Targets VF page).
- Click the relevant custom label (e.g., Available_Thematic_Area_Label) to open up the label's details.
- Then add a new translation via the related list (e.g., "Available Focus Areas" to replace "Available Thematic Areas").

10. Activate Process Automation

Beyond Apex triggers, Amp Impact includes automations, including processes and workflow rules & actions.

Process Builder

Amp Impact has one process builder - *Copy Objective Field Values onto Project Objective.* This copies the value in the ampi__Level__c and ampi__Definition__c fields on a ampi__Catalog_Objective__c record respectively onto the ampi__Level__c and ampi__Description__c fields on any child ampi__Objective__c records. By default, this is active on installation, and can be deactivated if your organization does not wish to use it. To do so, go to the Setup Quick Search box and search for "Process Builder". Expand the process builder and click 'Deactivate' next to the Active Version.

Workflow Rules

Amp Impact has four workflow rules on Result__c object, each of which are associated with at least one field update workflow action:

Workflow Rule Name	Description	Workflow Action(s)
Result values are created	Checks whether the result values on a result record are being populated for the first time	- Update ampi__Result_Created_Date__c - Update ampi__Result_Last_Modified_Date__c
Result values are edited	Checks whether the result values on a result record have been modified	Update ampi__Result_Last_Modified_Date__c
Target values are created	Checks whether the target values on a result record are being populated for the first time	- Update ampi__Target_Created_Date__c - Update ampi__Target_Last_Modified_Date__c
Target values are edited	Checks whether the target values on a result record have been modified	Update ampi__Target_Last_Modified_Date__c

These workflow rules and actions are *Active* on installation of the managed package. They can be deactivated if your organization does not wish to use them. To do so, go to the Setup Quick Search box, and search for "Workflow Rules". Click "Deactivate" next to any Workflow Rules that your organization does not want to use.

Set Up Projects

In order to start using Amp Impact, you will first need to create records for a group of Objects through the native interface (or Dataloader). The order of operations for these Objects is:

1. Create a Project

- Open the Projects tab and click New.
- Enter the Project's name.
- Amp Impact comes with some fields to enter project relevant data: description, country, start date, end date. Enter data for any relevant fields.
- Click Save.

> **Important:**
> Projects in Lightning Experience are displayed with each of the Visualforce pages included as a tab, and users can toggle between each page without leaving the project's record detail page. When entering data on one Visualforce page that affects the data/display on another Visualforce page, you **will** need to refresh the page in order for the tables and charts to render correctly.

1a. Customize the Project record page - Optional.

Amp Impact provides two interfaces for project records, depending on whether a user is in Salesforce's Classic or Lightning Experience.

Projects in Lightning Experience are displayed with each of the Visualforce pages included as a tab, and users can toggle between each page without leaving the project's record detail page.

● There are two available action buttons: Edit & Delete.
● The Path above the record's tabs is linked to the Project Status field. Update the field by using the Path component or by editing it directly within the Project record.
● By default, the tabs on the Project Lightning Record Page include: Details, Setup (Related Lists), Framework, Indicators, Targets, Results, Performance Graphs, and Financials.
  ○ To add or remove any of these tabs, clone the Lightning Record Page and, in the cloned page, edit the tabs and tab order by clicking on the Tab Component.[6]
● If your organization needs to change Project's record layout in Lightning because only certain pages are utilized by their users, create a new Lightning Record Page with the desired setup through the Lightning App Builder. To add any of the Visualforce pages to a Lightning Page:
  ○ Drag the Visualforce Lightning Component onto the page.

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[6] When adding a new tab, be sure to place a Lightning Component within the tab in order for the tab to save and display.

- ○ Click into the component.
- ○ Use the picklist on the left side to select which Amp Visualforce page to display in the component's space.
- ● If your organization needs to change the Project's page layout in Lightning because only certain fields are utilized by users, edit those items directly in the page layout editor in Setup.
  - ○ Control access to fields on the Project record layout by adding/removing those fields.

Projects in Classic Experience are displayed with each of the Visualforce pages accessible through a custom button. When navigating to any of the Visualforce pages, the Nav Bar will display at the top in order to facilitate easy toggling between the pages.

- Each of the Visualforce pages is available as a custom button, following the Edit and Delete standard buttons.
- If your organization needs to change the Project's record layout in Classic because only certain pages and/or fields are utilized by users, edit those items directly in the page layout editor in Setup.
  - Control access to Visualforce pages through the Project record layout by adding/removing buttons from the button menu.
  - Control access to fields on the Project record layout by adding/removing those fields.

2. Create records for the following objects (as relevant to your organization). See detailed instructions below.

- Reporting Periods
- Geographic Areas
- Project Geographic Areas
- Disaggregation Groups (with Disaggregation Values)
- Thematic Areas
- Objectives
- Project Thematic Areas
- Project Objectives

2a. Create Reporting Periods

Once you have a Project, create Reporting Periods for that project. A Reporting Period is a section of time that you will set targets and results for this project.

- The Set Targets and Add Results pages will not work if you do not create at least one Reporting Period.

- To create reporting periods, click the New Reporting Period button from the related list on your Project.
- Enter a Name for the reporting period.
- Select the Report Type. This controls which indicators will be reported on in this reporting period. If my report type is quarterly, then all indicators with a quarterly reporting frequency will display for this reporting period.
- Enter the start and end dates for the reporting period.
- When creating reporting periods, ensure that your naming convention is consistent with your organization's standards. For example, does the organization refer to this time period as Q2 2017 or Apr-Jun 2017? Does the fiscal year start in January, April, October? Consistency is important to get the clearest output from the system.
- You can leave all these other fields blank for now. Click Save and New to create other Reporting Periods for this project, or just Save to finish creating reporting periods.

2b. Create Geographic Areas and Project Geographic Areas

Next, create Geographic Areas (GA) and Project Geographic Areas (PGA), through which organizations control which GAs display for which Projects. This is helpful for organizations working on a variety of projects in different regions.

Linking a Geographic Area to a Project means that only the relevant Geographic Areas show up for that Project's Indicators.
- Geographic Areas are the areas that the organization operates in and wants to report targets and results for.
    - o To create a GA, navigate to the Geographic Area tab and click New.
    - o Enter the name of the Geographic Area.
    - o If there is a Parent GA, look up and select its name in the Parent Geographic Area field. For example, if I'm entering Maharashtra, which is a state in India, I want to indicate that Maharashtra's Parent Geographic Area is India. Note that this means you

should create your highest-level Geographic Areas first, then move down to lower levels.

o Select the Type for the Geographic Area and click Save.

● A Project Geographic Area is a junction between a Project and a Geographic Area. <u>The Set Targets and Add Results pages will not work if you do not create at least one PGA.</u>

o To create a PGA, click New Project Geographic Area from the related list on the Project.

o Specify which Geographic Area you'd like to link to this project, then click Save And New to link another, or just Save to finish creating PGAs.

2c. Create Disaggregation Groups (with Disaggregation Values) - *Optional*

Some organizations disaggregate their indicators using disaggregation groups. A Disaggregation Group is a way for an organization to break down targets and results by indicator into different categories. For example, you can create a Disaggregation Group called Age Group and then break down targets and results for specified indicators into different age brackets. Disaggregation Group records serve as an umbrella, parent record to a group of Disaggregation Values- for example, Disaggregation Group record *Age* would be parent to Disaggregation Value records 0-*25*, *26-50*, and *51+*.

● **To create a Disaggregation Group, go to the Disaggregation Groups tab and click New.**

o Enter the Name of the Disaggregation Group and click Save.

o Next, you need to enter the Disaggregation Values. To create them, click New Disaggregation Value in the related list on the Disaggregation Group.

o Enter the name of the Disaggregation Value, and which order it should appear in.

o Click Save and New to create additional Disaggregation Values. You may add any number of Disaggregation Values as children to a single Disaggregation Group.

Disaggregation Assignment

A Project can have any number of Disaggregation Groups. However, an Indicator or Project Indicator can be disaggregated by one Disaggregation Group only. Disaggregation by Sex is

captured outside of the Disaggregation Group setup. This allows an Indicator or Project Indicator to be disaggregated by 2 groups: (a) Cross-disaggregation by Sex (horizontal data entry) + 1 custom disaggregation group (vertical data entry).

2d. Create Objectives – *Optional* (Required <u>only</u> if you are using the Manage Framework Visualforce page)

Some organizations tag / categorize indicators within a specific impact measurement framework that may use Objectives (or other terminology such as Approach, Activity, Goal, Outcomes etc.). **Create Objectives and Project Objectives to specify which of the Organization's objectives that project is working towards**. This will be helpful for reporting and for narrowing down which objectives the project's indicators can be linked to. Project Objectives can be created in two ways:

Create Objectives and Project Objectives by building out a project's Framework.
- Open the Manage Framework Visualforce page from the project record detail.
- <u>Note</u>: this page uses Framework Items to refer to all types of Objectives. Organizations often use different terminology and the product uses the Framework item to refer to all types of items that can form an organization's impact / results / logical framework.
- Click the Add New Framework Item button in the top right corner of the page.
- Click Save to create both an Objective and a Project Objective to be displayed in the framework table.
- When creating a new Objective / Framework Item, populate the Parent Objective field to create a hierarchy in the table based on Objectives and sub-Objectives.

Create Project Objectives directly from a project's record detail
- To create a Project Objective, click the New Project Objective button from the related list on the Project page.
- Select the Objective the project is working on, and click Save and New to create another one or Save to finish creating Project Objectives.

2e. Create Thematic Areas – *Optional*

Some organizations tag / categorize indicators with Thematic Areas (or other terminology such as Investment Theme, Impact Pillar, etc.). In order to create Project Thematic Areas, follow these steps:

Create Thematic Areas and Project Thematic Areas to indicate which Thematic Areas the Project is associated with. Setting these up will help narrow down which Thematic Areas the project's indicators can be linked to.

Thematic Areas are categorizations of indicators that can be used to filter down or report on indicators. This will be useful when selecting which indicators to add to a project, or which indicators you want to set targets and results for.

- To create a Thematic Area, navigate to the Thematic Areas tab and click New.
    - o Enter the name of the Thematic Area.
    - o If you'd like to capture a lengthier description about the thematic area in addition to the name, enter it in the description field.
    - o If this Thematic Area is related to another Thematic Area, you can link them in the Parent Theme field, then click Save.
    - o *Optional* - to assign an icon to the Thematic Area, once you created and saved the Thematic Area record, click the *Open Icons Catalog* button on the record. A pop-up/tab will open displaying the catalog of icons and their respective codes. Click on an icon to copy the code, and then paste that value into the ampi__Icon__c field.
- To create a Project Thematic Area, click the New Project Thematic Area button in the related list on the Project.
    - o Select the Thematic Area associated with the Project, and click Save and New or Save.

3. Click on the "Manage Indicators" button to get started with creating your Project Indicators

Set Up Calculated and Aggregated Indicators

Enable Streaming API in the Salesforce Org (Required)

Some features of Aggregated and Calculated Indicators will only function correctly if Streaming API is enabled in your Salesforce org. To enable Streaming API, follow the below steps:

1. Open Setup
2. Use the Quick Find search to find and open User Interface
3. Scroll to the Setup section of User Interface
4. Make sure that 'Enable Streaming API' is selected
5. Click Save

New fields available in the Field sets

1. Indicator__c object
   a. Add New Indicator Popup:
      i. Type_of_Results__c (this is a required field)
2. Project_Indicator__c object
   a. Edit Project Indicator Popup:
      i. Type_of_Results__c
   b. Selected Project Indicators table on ManageIndicators page:
      i. Type_of_Results__c
      ii. Last_Aggregation_Date__c
      iii. Last_Calculation_Date__c
      iv. Calculation_Formula__c
   c. Add Results Info Popover on AddResults page:
      i. Type_of_Results__c
      ii. Last_Aggregation_Date__c
      iii. Last_Calculation_Date__c

      iv.   Calculation_Formula__c

Reminder - to make any edits to Field Sets:
1. Ensure that the org is in Classic
2. Navigate to Setup
3. Type in 'Objects' into the 'Quick Find/Search'
4. Select the Object
5. Navigate to 'Field sets'

☐ **NOTE**: It is recommended to include **no more than five fields** to display in the *Selected Indicators table*, to be able to view the information in a user-friendly manner

Set Up Submissions

☐ The Submissions feature consists of six Lightning Components. In order to be able to use Submissions in Amp, your Salesforce instance will need to be in Lightning Experience.

Field Sets: Customize Pop-ups to Create/Edit Sections and Questions in Submissions

ampi__Section__c and ampi__Question__c are two Amp objects that are used to customize Submission templates, fill out Submission responses, and score responses. Each object has a field set that controls the display of the respective pop-ups to add or edit records.

- Add/Edit Section Popup: Field set on Section object that determines which fields are displayed and required in the Add New Section and Edit Section pop-ups.
- Add/Edit Question Popup: Field set on Question object that determines which fields are displayed and required in the Add New Question and Edit Question pop-ups.

Assign Record Types on Profiles

ampi__Submission__c and ampi__Question__c each have two Record Types. Since the Amp package does not contain any Profiles, those Record Types need to manually be assigned to each Profile that needs access to the Submission feature.

- **ampi__Submission__c Record Types**
  - Template: Assign this record type to any Profile that needs to create or view submission templates.
  - Submission: Assign this record type to any Profile that needs to create a submission from a template, fill out a submission response, or review a submission response.
- **ampi__Question__c Record Types**

○ Question: Assign this record type to any Profile that needs to create or view questions on a submission template.
○ Answer: Assign this record type to any Profile that needs to create a submission from a template, fill out answers in a submission response, or review answers in a submission response.

Assign Permission Sets to Users

Amp Impact provides three permission sets that should be assigned to users depending on how they will be using the Submissions feature. The following table details each permission set and example users. For any custom permissions that need to be provided, clone the relevant permission set to customize the permission sets.

Permission Set	Description	Example User
Submission Template	Enables Users to access the fields necessary for creating Templates, creating Submissions from those Templates, and assigning new Submissions to parent records.	Program Officer
Submission Response	Enables Users to access the fields necessary to view their Submissions, fill out their answers to the Questions, and submit their response for review.	Grantee
Submission Review	Enables Users to access the fields necessary to view and edit Submissions assigned to them for review, assign scores to the response, and submit their scores for approval.	Assessment Reviewer

Follow these steps to ensure your Submissions Users can fully use the feature.

● Go to the Setup Quick Search box, and enter "Permission Sets"

- Open the permission set that you would like to assign to Users. This opens the permission set detail page.

- Click the "Manage Assignments" button in the top menu of the permission set detail page. This will load an assignment interface.

- In the next page, click the "Add Assignments" button in the top menu. This will load a list of all Users in the org.

- Select the checkbox next to each User to whom you want to assign the permission set. Once all relevant Users are selected, click the "Assign" button.

- Click "Done".

Customize Submission Objects, Lightning Pages, and Components

☐ To use the Lightning Components included in the Submission feature, MyDomain will need to be set up in your Salesforce org. For more details, please see Salesforce's documentation on how to set up MyDomain.

The new Submission feature involves three new objects, three new Lightning pages (on the ampi__Submission__c object), and seven Lightning Components, all of which can be configured to meet your specific use case. Review the following table to understand each Lightning Component, its functionality, and example users that might be interacting with the component.

Component Name	Function	Implementation	Example User
CreateTemplateData	Create and edit submission templates with sections and questions	Added to Lightning Page for Submission Templates	Program Officer
SubmissionTemplate Preview	Preview template to see how it will look to responding users	Added as Action to Submission Template page layout	Program Officer

SubmissionResponse Form	Respond to questions on a template assigned to a user	Added to Lightning Page for Submission Responses	Grantee
SubmissionResponse Review	Review and edit a user's submission *Note*: If a user has read-only access on any fields on the ampi__Question__c object, then those fields will be displayed as read-only in the component.	Added to Lightning Page for Submission Review	Assessment Reviewer
SubmissionResponse Scoring	Assign scores and add comments to a user's submission	Added to Lightning Page for Submission Review	Assessment Reviewer
SubmissionRadar Charts	View scores for all submissions on a single parent record (e.g. the scores from all Financial Reports submitted by an Organization/Account)	Not added anywhere by default - needs to be added to a custom Lightning page	Program Officer
SubmissionClone	Clone a submission (including responses if Record Type is Submission) so that the user can simply edit pre-existing responses for their next submission	Added as Action button to Submission Template Layout and Submission Layout	Grantee, Program Officer

1. Create a custom relationship between Submission and another object

Out of the box, the Submission object is not associated with any specific Salesforce object, besides Section and Question. Since the feature can be used to assess or qualitatively report on

any Salesforce object, the System Admin will need to custom configure that relationship depending on the organization's use case.

Add a lookup field on the Submission object to start creating Submission records for another object record. You can choose to add a lookup to Standard Salesforce objects, custom Amp Impact objects, or any custom object in your Salesforce system.When creating the lookup, select the "Required" checkbox.

Once the lookup field is created, be sure to add it to the page layout that will be displayed to Users creating Submission records to be filled out by other Users.

2. Create a Submission Relationship custom setting record

Once Submission is related to another object, a custom setting record will need to be created in order to correctly display Radar Charts on the parent object record pages.

- a. Go to Custom Settings in Setup.
- b. Click "Manage" next to Submission Relationship.
- c. Click "New" button.
- d. Fill out the *Name* field with the API name of the parent object.
- e. Fill out the *Child Relationship Field Name* field with the API name of the relationship field created earlier.

In the example below, Submission is looking up to Accounts (Object API Name: Account) through a custom lookup field on Submission (Field API Name: Parent_Account__c).

> ☐ If the organization's use case will involve creating Submissions for multiple objects, then Steps 2 and 3 will need to be repeated for each object that will require the Submissions feature.
>
> For example, an organization may conduct assessments on Organizations/Accounts *and* request narrative reporting for Projects. The System Admin will need to add one lookup field and one custom setting record for Account, and repeat the process for Project onto the Submission object.

3. (Optional) Create a custom assignment field on Submission

> ☐ This field may be the same as the lookup field configured in Step 1. If the lookup field already created in that step or an already existing field (e.g. Record Owner) will be leveraged for assignment, please proceed to Step 4.

Out of the box, the Submission object does not have a field in which users can assign Submissions for completion or review. Since Submissions can in practice be assigned to a record of any object (e.g., Accounts, Contacts, Users, etc.) in a Salesforce system, the System Admin may need to custom configure a lookup relationship field in order to facilitate Submission record assignment.

Once the field is configured, a custom listview can then be created that only displays Submissions assigned to the current user. For example, if the custom lookup field looks up to the User object, the System Admin can create the listview with a filter such that it only displays Submission records where the custom field value matches the current User Id.

4. Assign the Submission page layouts to specific profiles & record types

Out of the box, the Submission object comes with three page layouts:

1. Template Layout - this should be accessed by users who will be creating, editing, and downloading submission templates.
2. Response Layout - this should be accessed by any users who will be filling out responses in submissions (e.g. Community Users).
3. Submission Layout - this should only be accessed by users who need to see the full details of the submission record (e.g. System Administrators).

On the Submission object, scroll to the Page Layouts and click the *Page Layout Assignment* button to customize which page layout is displayed to which user profile and record type.

Page Layouts		New	Page Layout Assignment		
Action	**Page Layout Name**	**Installed Package**	**Created By**		**Modified By**
Edit | Del	Response Layout	Amp Impact	Amp beta 3, 8/7/2018 7:07 AM		Amp beta 3, 8/8/2018 4:54 AM
Edit | Del	Submission Layout	Amp Impact	Amp beta 3, 8/7/2018 7:07 AM		Amp beta 3, 8/8/2018 4:54 AM
Edit | Del	Template Layout	Amp Impact	Amp beta 3, 8/7/2018 7:07 AM		Amp beta 3, 8/8/2018 4:54 AM

5. Assign the Lightning pages to specific profiles

Lightning Page	API Name	Function	Components
Submission Template Record Page	Submission_Template _Record_Page	Enables users to create and edit submission templates, preview templates and	CreateTemplateDat a SubmissionTemplat

		assign those templates to other users to fill out	ePreview SubmissionClone
Submission Response Record Page	Submission_Response_Record_Page	Enables users to fill out any submissions that have been assigned to them and submit responses for review	SubmissionResponseForm SubmissionClone
Submission Review Record Page	Submission_Review_Record_Page	Enables users to read responses submitted by other users and assign scores to those responses	SubmissionResponseReview SubmissionResponseScoring

None of the Lightning pages have pre-configured user assignments. Provide user access to the three pages directly through the activation settings on the pages themselves, based on how Users will be working with Submissions.

Additionally, by default, the three new Lightning pages are configured based on the three main functions of the Submission feature: Template creation, Submission response, and Submission review. These Lightning pages can be further configured to address an organization's specific use case by cloning the pages and making the necessary changes.

6. (Optional) Set up automation to assign scores to Sections and Submissions

Scores on Sections (ampi__Section__c.ampi__Score__c) and Submissions (ampi__Submission__c.ampi__Overall_Score__c) can be populated either manually or through automation, based on the score values assigned to child records.

To use automation (e.g. section scores should take the average of the question response scores) to populate these values, the automation will need to be custom configured in Setup according to the organization's requirements.

7. (Optional) Set up automation to lock Responses and/or Reviews

The SubmissionResponseForm and SubmissionResponseScoring components are displayed as either editable or read-only, depending on the value in two fields on the Submission object.

1. If *ampi__Response_Locked__c* = TRUE, then the SubmissionResponseForm component is locked from editing for all Users on that Submission record.
2. If *ampi__Review_Locked__c* = TRUE, then the SubmissionResponseScoring component is locked from editing for all Users on that Submission record.

By default, these fields are updated manually. If the components should lock after specific user actions, automation can be built to auto-populate these fields based on those user actions. For example, if the SubmissionResponseForm component should lock after a user submits their response, then a workflow rule can be built such that when *ampi__Response_Status__c* = "Submitted", *ampi__Response_Locked__c* updates to TRUE, and the user can no longer edit their answers.

8. Add the Radar Chart component to Lightning and Community pages

Since the parent object of Submission needs to be custom configured for each organization, the radar chart component (SubmissionsRadarChart) is not included on any Lightning page out of the box. To display the component, simply open the Lightning record page of Submission's parent object in the Lightning App Builder and/or Community Builder and drag the Radar Chart component into the desired space on the page. As needed, add visibility filters to the component to only display the component when certain criteria are met.

☐ The radar chart component only displays on a Lightning page if the related submission template has child submissions with scored sections. If the submission template has no sections or the sections are not scored, then the **component will display as blank**.