Upgrade Instructions

Release Date: April 2020 | Version Name: Cassiopeia (Spring 2020) | Version Number: 1.24

1. To upgrade to the latest release of Amp Impact, log into your <u>Sandbox</u> environment and use this installation link:

    https://test.salesforce.com/packaging/installPackage.apexp?p0=04t4o000002FHy9

    a. Information will be displayed confirming that you have an earlier version installed and it can be upgraded while preserving existing data.
    b. Select which users you wish to install the package for.
    c. Click "Upgrade".
2. Refer to the release notes document and learn about the new features and bug fixes for this release.
3. After reviewing the release notes, follow the steps outlined below.
4. Perform your current use cases in the sandbox and if you are using any of the new features from this release, ensure that they are operating as expected.
5. When you are ready to deploy to <u>Production</u>, use this installation link:

    https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4o000002FHy9

6. Update any changes you make, for example to custom settings, in Production as these will not "carry over" from your sandbox.

> ① If My Domain has already been set up, replace "test" or "login" in the installation links with the specific domain for the org.

Packaging Changes

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

The table below details which types of configuration changes need to be made manually, and if so, also include an example of where to change them. For full details of what has been added or modified, refer to the Packaging Changes section in the Release Notes.

Component	Automatic Update?	Manual Update Location	Example from Cassiopeia Release
New custom field	Yes		New ampi__Name_Translated__c field added to ampi__Thematic_Area__c object
Updated custom field	Yes		Reduced character limit from 32768 to 2500 on ampi__Guidelines__c on ampi__Indicator__c
Updated permission set	Yes		New ampi__Name_Translated__c field on ampi__Thematic_Area__c added to Amp Impact Admin permission set
Updated field set	Yes[1]	Object ▯ Field Sets	Updated ADD_RESULTS_INFO_POPOVER on ampi__Project_Indicator__c with Translation fields
New custom label	Yes		New custom label SUBMIT_RESPONSE_ERROR_MESSAGE added for multi-language capability
Updated global value set	No	Picklist Value Sets	Updated Indicator_Fields global value set to include translation fields
Picklist values	No	Object ▯ Field	Added new picklist value Multi-select Picklist to the ampi__Response_Type__c field on the ampi__Question__c object
Page Layouts	No	Object ▯ Page Layout	New Risk Assessments related list added to Risk record page layout

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[1] If a new field is added to a field set by upgrading the package, the field will be appended to the end of the field set that already exists in the org. Additional setup may be needed to reorder the field set.

Enable Multi-Language Capability

> ① These steps are only required if an environment is going to be used in multiple languages. If the environment is only used in a single language, skip to the next section. For full details of this new functionality and setup, please consult the Multi-Language Capability Setup Guide.

Amp Impact data can now be tracked in multiple languages on all catalog objects and select project-level objects.

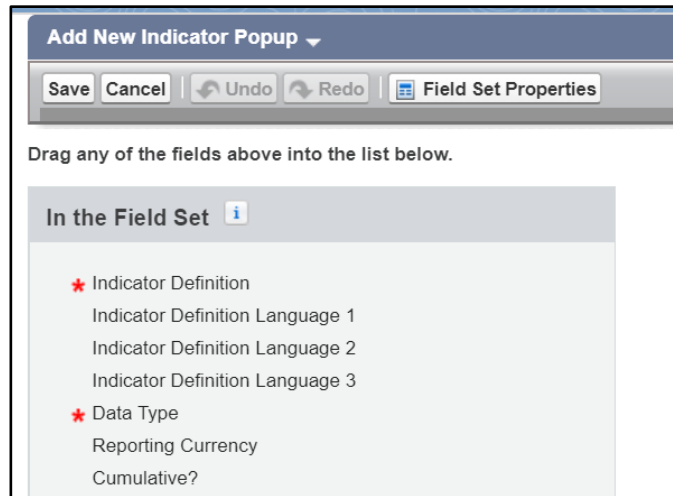## Modify Page Layouts for Entering/Viewing Data in Multiple Languages

The fields for data entry in multiple languages are not added to the page layouts by default. The objects listed below have new fields that were created for multiple language capability, and thus, the page layouts should be manually updated so that this information is visible on the record pages. For a complete list of the fields that should be added to the page layouts, please consult the Release Notes and the Multi-Language Capability Setup Guide.

1. ampi__Catalog_Objective__c
2. ampi__Disaggregation_Group__c
3. ampi__Disaggregation_Value__c
4. ampi__Geographic_Area__c
5. ampi__Indicator__c
6. ampi__Objective__c
7. ampi__Project__c
8. ampi__Project_Indicator__c
9. ampi__Reporting_Period__c
10. ampi__Thematic_Area__c

Modify Field Sets for Entering Data in Multiple Languages

After upgrading, the new fields for entering data in multiple languages will by default be available for the field set, but they will not be added into the field set. If users will be tracking data in multiple languages, these fields will need to be manually added to the field set. These fields can be identified by the following API Name structure:

- ampi__[Default Language Field Name]_Language_1__c
- ampi__[Default Language Field Name]_Language_2__c
- ampi__[Default Language Field Name]_Language_3__c

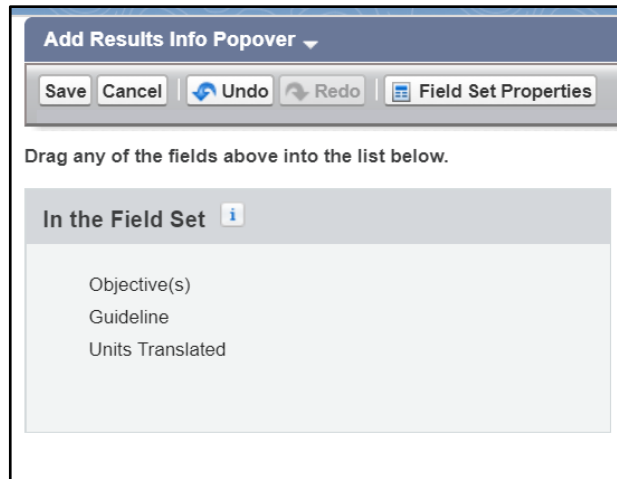Depending on how many languages need to be supported, any number of these fields can be added to the field set.

For a list of all the fields with multiple language support and the field sets to which they can be added, please review the Multi-Language Capability Setup Guide.

Modify Field Sets for Viewing Data in Multiple Languages

After upgrading, the new fields for viewing data according to the user's language locale will by default be available for the field set, but they will not be added into the field set. If users will be tracking data in multiple languages, these fields will need to be manually added to the field set. These fields can be identified by the following API Name structure:

To display data in the user's language, translated fields should be added to field sets that control data tables and filters:

- For all supported Text and Text Area fields, add the translated formula field (i.e. ampi__[Default Language Field Name]_Translated__c) to field sets.
- For all supported Long Text Area fields, add the default language text field (i.e. ampi__[Default Language Field Name]__c) to field sets .

For a list of all the fields with multiple language support and the field sets to which they can be added, please review the Multi-Language Capability Setup Guide.

Modify Global Value Set for Ordering Data by Translated Fields

Due to a [Salesforce limitation with managed packages](#), global picklist value sets do not automatically update when the package is upgraded. To ensure that the default order of data in tables (e.g. Indicator Catalog) also reflects the user's language locale, some picklist values will need to be manually updated to ensure that the display is consistent for all users, irrespective of their language locale (e.g. Indicator Definition orders alphanumerically for both Spanish and English users based on the values that they see for the Indicator Definition).

Follow the steps below to update the Global Value Set that is used for setting the default order of tables:

1. Open Setup and go to Picklist Value Sets.
2. Click on the 'Indicator Fields' value set.
3. Edit the following picklist values' API Names such that:
    a. ampi__Description__c 🡪 ampi__Description_Translated__c
    b. ampi__Disaggregation_Group__c 🡪 ampi__Disaggregation_Group_Translated__c
    c. Note: if these picklist values are inactive, then they will not be editable.
4. Click 'Save' for each updated picklist value.

Update Historical Data with Translated Values

For any existing data in the system, by default, all of the new fields will be set to NULL, and thus can only be viewed in the system's default language. To make existing data usable

for multiple language locales, this historical data must be updated to populate the three additional language fields.

- ampi__[Default Language Field Name]_Language_1__c
- ampi__[Default Language Field Name]_Language_2__c
- ampi__[Default Language Field Name]_Language_3__c

Use Data Loader to export the original value from the Default Language field and upload translated values into the three additional language fields.

Additional Setup for Submissions Enhancements

This release provides several enhancements to Submissions, including the new question/response type of multi-select picklist and the ability to set character limits for qualitative responses.

Modify Field Sets to Define Character Limits for Qualitative Responses and to Provide Guidance to Reviewers

Two new fields (ampi__Text_Response_Character_Limit__c and ampi__Reviewer_Instructions__c) have been added to the Add_Edit_Question_Popup field set on ampi__Question__c. Each field is associated with different functionality:

1. ampi__Text_Response_Character_Limit__c: When a Question's Response Type is set to Qualitative, character limits can now be set in this field to ensure that respondents stay within the maximum characters allowed for the response to a particular question.
2. ampi__Reviewer_Instructions__c: This field is used to provide guidance to reviewers when they are reviewing responses in a Submission. The text entered here is displayed in the SubmissionResponseScoring component as help text.

After upgrading, the new fields are automatically added to the end of the Add_Edit_Question_Popup for adding/editing Questions in a Submission Template. This field set can be further modified to ensure a logical flow for users while building out their Submission Template.

Provide Access to Response Type picklist value for Multi-Select Picklist

Due to the [special behavior of picklist values](#) in upgraded managed packages, upgrading Amp will not automatically add the new option of Multi-select Picklist to the ampi__Response_Type__c field on ampi__Question__c, and the Multi-select Picklist picklist value must be manually added in order to allow users to create and respond to multi-select picklist questions in Submissions.

1. Open Setup and go to Object Manager.
2. Open the ampi__Question__c object.
3. Open Fields & Relationships.
4. Click on the ampi__Response_Type__c field.
5. Navigate to the Values section and click the 'New' button.
6. In the Add Picklist Values screen:
    a. Type 'Multi-select Picklist' into the text box.
    b. Select the checkboxes next to both Answer and Question at the bottom to enable the picklist value for both Record Types.

7. Click 'Save'.

Update Custom Permission Sets per Salesforce Critical Updates

> ① This step is optional, as it is only relevant for users who are accessing the SubmissionResponseForm Lightning Component in Communities through a custom permission set. Users assigned the out-of-the-box Amp Impact permission sets do not require this update.

Per Salesforce's restriction of access to @AuraEnabled Apex methods, any custom permission sets used by Users with access to the SubmissionResponseForm Lightning Component in a Community must be updated to ensure this access remains unaffected. Follow these steps to provide this access.

1. Open Setup and go to Permission Sets.
2. Click the custom Permission Set.
3. Click 'Apex Class Access'.
4. Click 'Edit'.
5. In the 'Available Apex Classes' list, select ampi.SubmissionResponseForm_CTRL and add it to the 'Enabled Apex Classes' list.
6. Click 'Save'.

Page Layout Changes

Per the release notes, page layout changes have been made on multiple objects, as a result of the addition of new fields in most cases. These page layout changes will not be reflected when you upgrade. This is to ensure that any customizations made by users are not overridden. Please review the Packaging Changes section of the release notes in detail and determine which, if any, of the layout changes you would like to replicate. If there are any, please do so manually.