ENTERPRISE APPLICATION SOLUTION FOR YIELD (EASY) INSTALLATION GUIDE

OPEN-SOURCE SOLUTION FROM MARYVILLE UNIVERSITY

DEVELOPED IN PARTNERSHIP WITH HURON CONSULTING GROUP

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OVERVIEW

AUDIENCE

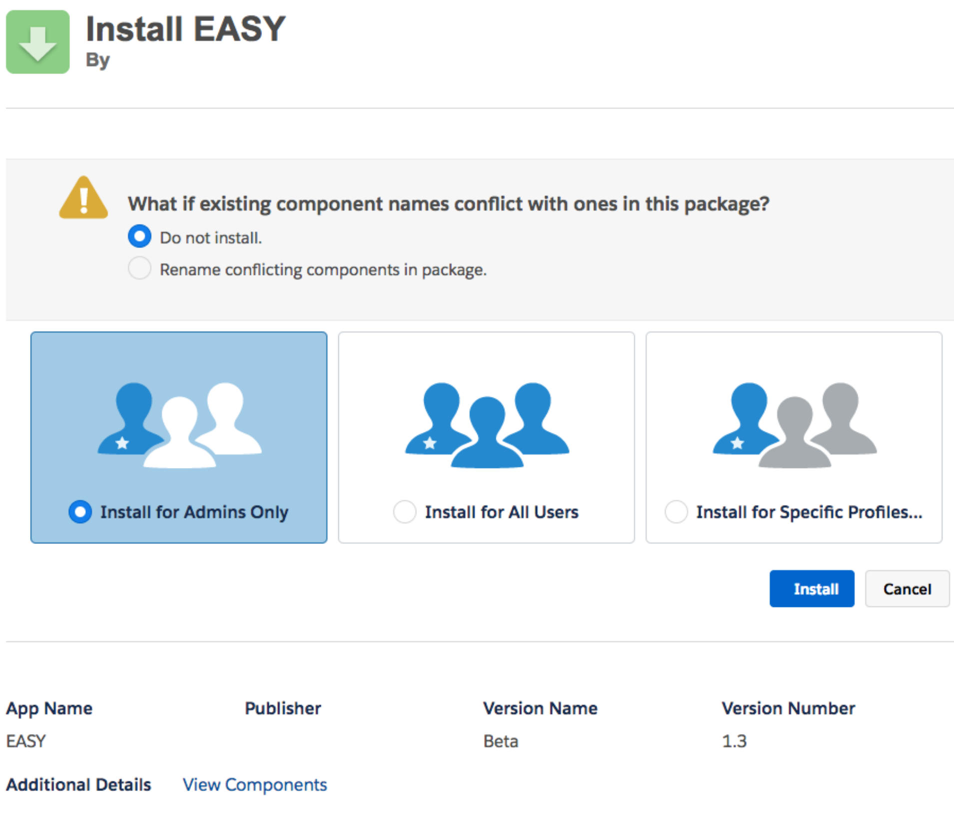
This installation guide is intended for System Administrators to assist in installing and performing the initial configuration steps for the EASY application. This installation guide assumes that you already have the EASY User Guide.

INSTALLATION

Installation can either be done via unmanaged package URLs or the Ant Force.com Migration Tool. If EASY is being installed for the first time, either method can be used; however, if EASY is already installed, the Ant method need to be used. Otherwise, EASY has to be completely uninstalled from the Installed Packages list in Setup and then re-installed via the URL. This is a Salesforce limitation on unmanaged packages (versioning is not supported).

UNMANAGED PACKAGE

1. Proceed to the installation url:
    a. Sandbox: https://test.salesforce.com/packaging/installPackage.apexp?p0=04t29000000DwFk
    b. Production/Developer: https://login.salesforce.com/packaging/installPackage.apexp?p0=04t29000000DwFk
2. If you are not logged into your Salesforce org, you will be prompted to log in
3. Once at the login screen, select the profile(s) that you want to give access to and click install
    a. Note: Any profiles selected here will have full access to all EASY functionality. EASY provides several permission sets that give administrators more fine-grained control of who can do what. Details around these permission sets are included in the Technical Guide. We recommend only granting access to the System Administrator profile during installation and assigning permission sets to users that need access to EASY.



4. Once the installation completes, you will be able to begin the post installation steps

ANT/FORCE.COM MIGRATION TOOL

1. Go to the Github repository here: https://github.com/SalesforceFoundation/EASY-Open-Source-Solution
2. Fork the repository by clicking on the “Fork” button in the upper-righthand corner. This creates your own copy of EASY for your Github user.
3. Clone your fork to your local machine via the command line:

```
$ git clone https://github.com/YOUR-USERNAME/EASY-Open-Source-Solution.git
```

4. You now have a local copy on your machine. EASY has some built-in scripts to make deploying to your Salesforce org easier. Utilizing ant and the Force.com Migration tool, you can push your local copy of EASY to the org of your choice. You'll need to provide a build.properties to tell ant where to deploy. An example file might look like:

```
sf.username = YOUR_ORG_USERNAME
sf.password = YOUR_ORG_PASSWORD
sf.serverurl = https://login.salesforce.com ##or test.salesforce.com for sandbox
environments
sf.maxPoll = 20
```

5. Now deploy to your org utilizing ant:

```
$ cd EASY-Open-Source-Solution
$ ant deploy
```

POST INSTALLATION STEPS

COMMUNITY SETUP

Follow the steps below to create a basic community for use with EASY. If you already have a community created, you can skip to the next section. Please see the documentation here for additional information on creating communities.

1. Go to Setup>Community Settings
2. If the “Enable Communities” page shows up, check the “Enable communities” choose a domain name, and click save. Otherwise, skip to step 3.
   a. Note: After you select a domain name, it can’t be changed
3. Go to Setup>All Communities
4. Click the “New Community” button
5. Choose a Community Template
   a. Custom Service or Build Your Own is recommended
6. Click “Get Started”
7. Give you community a name and URL suffix (e.g. “Admissions”)
8. After saving, click on “Administration”
9. Navigate to the “Emails” part of the sidebar
10. Uncheck the “Send Welcome Email” checkbox and click “Save”
11. Navigate to the “Members” part of the sidebar
12. Under the “Select Profiles” section, change the “Search” dropdown to “Portal” and select a portal profile to give access to the community

13. Under the “Select Permission Sets” section, add the “Application Community” permission set to the Selected Permission Sets
14. Click “Save”
15. Navigate to the “Settings” part of the sidebar
16. Click the “Activate Community” button

That’s it! You now have a Salesforce Community that can be configured for use with EASY.

COMMUNITY CONFIGURATION

Once you have a community created, follow the steps below to configure it to work with EASY.

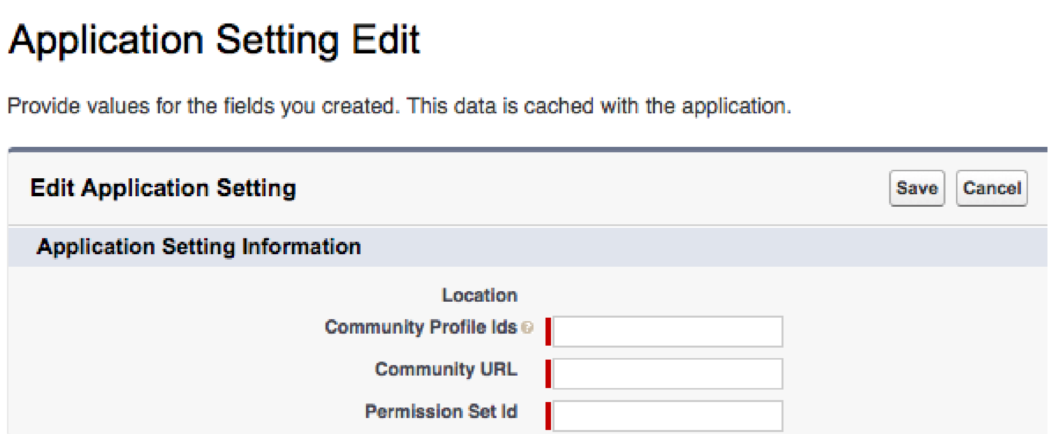
1. Grant the community access to ApplicationRegistration; this will allow unauthenticated users to access the registration page
    a. Go to Setup>All Communities
    b. Click on “Workspaces” for the community you’re using
    c. Click on “Administration”, followed by “Pages”, “Go to Force.com”
    d. Next to “Site Visualforce Pages”, click “Edit”
    e. Add the “ApplicationRegistration” page to the “Enabled Visualforce Pages” section
    f. Click “Save”
2. You will need to assign the community guest user the “Application Community Guest” permission set. This permission set grants access to the registration page as well as the application objects to a user that has not been authenticated (i.e. a net-new applicant).
    a. Go to Setup>All Communities
    b. Click on “Workspaces” for the community you’re using
    a. Click on “Administration”, followed by “Pages”, “Go to Force.com”
    b. Click “Public Access Settings”
    c. Click “View Users”
    d. Click on the full name of the guest user
    e. Next to “Permission Set Assignments”, click “Edit Assignments”
    f. Add the “Application Community Guest” to the “Enabled Permission Sets” section
    g. Click “Save”
    h. If you get a message saying that the permission set cannot be assigned because the number of apps would be exceeded, follow these steps:
        i. Click on the profile associated with the user
        ii. Under the Assigned Apps section, change the default to “Enterprise Application”
        iii. Repeast steps C through G
        iv. Go back to the profile associated with the user

        v. Change the default app back to what it was before

3. Configure Login & Registration. This will allow a new applicant contact, account, application and community user to be created.
    a. Go to Setup>All Communities
    b. Click on “Workspaces” for the community you’re using
    c. Click on “Administration”, followed by “Login & Registration”
    d. Ensure the “Allow external users to self-register” checkbox is checked
    e. Select the self-registration page
        i. You may choose a custom self-registration page if you have one; however, the one that comes with the application is “ApplicationRegistration”. You will need to choose “Visualforce Page” from the dropdown in order to see this page in the lookup.
    f. Choose your community profile. The ID for this profile should have been added to the Application Setting custom setting from the “Application Setting Custom Setting” step.
    g. Choose your community Account. Here, you can choose any Account. This will be the account that any new applicant contacts will be created under. What is chosen here is dependent on the account model of your organization. If you are using bucket accounts, you can choose the bucket account here. If you are using the Higher-Education Data Architechture (HEDA), you can leave this blank, and HEDA will create the administrative account for you.

APPLICATION SETTING CUSTOM SETTING

In order to assign the correct permissions to new community users created by the EASY registration page, you need to specify what permission sets are assigned on user creation. EASY does this based on a custom setting called “Application Setting”. Navigate to Setup>Custom Settings>Application Setting>Manage>New (make sure you hit “New” at the top of the page and not above the list.



Here, you will need to fill-in three fields:

1. Location: This should be blank
2. Community Profile Ids: This is a semi-colon delimited list of Salesforce Profile IDs. When a user is created with one of the Profile IDs in this list, it will be assigned the permission set denoted in "Permission Set Id". You'll want to make sure the ID for the profile you selected as the community profile is included here.
    a. Go to Setup>Profiles
    b. Click the profile you specified as the community profile earlier
    c. Copy and paste the ID from the URL into this field
        i. This will be between the "%2F" and "%3F" in Lightning or after the forward slash in Classic
3. Community URL: This is the base URL for the community. To retrieve it:
    a. Go to Setup>All Communities
    b. Click on "Workspaces" for the community you're using
    c. Click on "Administration"
    d. Copy and paste the URL from the "Settings" page into this field
4. Permission Set Id: This is the ID of the "Application Community" permission set that comes with the EASY package.
    a. Go to Setup>Permission Sets
    b. Click on the "Application Community" permission set
    c. Copy and paste the ID from the URL into this field
        i. This will be between the "%2F" and "%3F" in Lightning or after the forward slash in Classic
    d. Note: If your community uses the "Customer Community Login" license type, you will need to make sure this permission set does NOT have the Create permission on the Account object

PERMISSION SETS

Unfortunately, standard object permissions can't be included in packages. This means that you'll have to manually grant permissions for these.

1. Go to Setup>Permission Sets
2. Click on the "Application Community Guest" permission set
3. Go to Object Settings>Accounts>Edit
    a. Under "Object Permissions", select "Read" and "Create"
    b. Give edit access to the "Billing Address" field
    c. Click "Save"

4. Select “Contacts” from the dropdown at the top and click “Edit”
    a. Under “Object Permissions”, select “Read” and “Create”
    b. Give edit access to the “Email” and “Mailing Address” fields
    c. Click “Save”
5. Go back to Setup>Permission Sets
6. Click on the “Application Community” permission set
7. Go to Object Settings>Accounts>Edit
    a. Under “Object Permissions”, select “Read” and “Create”
    b. Give edit access to the “Billing Address” field
    c. Click “Save”

STATIC RESOURCES

In order to start to build applications, at least one Application Control record must be created (details in the User Guide). This record requires the “Logo Static Resource” field that’s used to reference the logo that’s displayed to applicants in the community. You will need to add a logo image as a static resource to be used here:

1. Go to Setup>Static Resources
2. Click “New”
3. Give the resource a name (this is what needs to be put in the “Logo Static Resource” field on the Application Control record)
4. Choose a file to upload
5. Set the “Cache Control” to “Public”
6. Click “Save”

PAGE LAYOUT ASSIGNMENTS

After installation, you will need to assign page layouts to the correct record types for all profiles:

Requirement Item Object:

- Master: Reqirement Item Layout
- Document Upload: Requirement Item Document Upload Layout
- Question Group: Requirement Item Question Group Layout
- Related Object: Requirement Item Related Object Layout

Question Object:

- Master: Question Layout
- Address: Question Layout

- Checkbox: Question Special Layout
- Currency: Question Layout
- Date: Question Special Layout
- Date/Time: Question Special Layout
- Email: Question Email Layout
- Number: Question Layout
- Percent: Question Layout
- Phone: Question Layout
- Picklist: Question Picklist Layout
- Picklist (Multi-Select): Question Picklist Layout
- Radio: Question Picklist Layout
- Reference: Question Reference Layout
- Static: Question Static Layout
- Text: Question Text Layout
- Text (Encrypted): Question Text Layout
- Text Area: Question Text Layout
- Text Area (Long): Question Text Layout
- URL: Question Layout

Question Dependency Object:

- Master: Question Dependency Layout
- Checkbox: Question Dependency Checkbox Layout
- Multi-Select Picklist: Question Dependency Layout
- Picklist: Question Dependency Layout

FLOW DEFINITIONS

If you installed EASY via the Ant, you'll need to activate the Process Builder process that supports external requirements (e.g. Letters of Recommendation, etc.). Go to Setup>Process Builder and activate the "External Response Requested" process. You can skip this step if you installed via the package URL.

ULTRA MAPPINGS

The EASY solution leverages Miami University's ULTRA solution (also known as Interactions for Student Recruitment) and the ULTRA object to create new Contacts and match to existing Contacts. Because of this, ULTRA Mappings need to be setup. This will map fields on the ULTRA object to fields on the Contact object. To do so, follow these steps:

1. Go to the "Interaction Mappings" tab
2. Create the following three mappings at a minimum:
    a. First Name
        i. Target Object API Name: Contact
        ii. Target Field API Name: FirstName
        iii. Interaction Source Field API Name: First_Name__c
    b. Last Name
        i. Target Object API Name: Contact
        ii. Target Field API Name: LastName
        iii. Interaction Source Field API Name: Last_Name__c
    c. Email
        i. Target Object API Name: Contact
        ii. Target Field API Name: Email
        iii. Interaction Source Field API Name: Email__c

The ULTRA solution offers many different features and customization options. Check out the Overview, User Guide, Configuration Guide, and Technical Implementation Guide here. Please note that ULTRA is installed as a part of EASY, so there is no need to try and install it again.