NovoEd Salesforce App Set Up Guide

Overview

The NovoEd Salesforce App assumes that NovoEd is the source of truth for courses, enrollments and enrollment status. The app enables saving this data in tables owned and managed by the app. If enabled by the customer and if provided with a mapping, it maps the data from the Salesforce tables managed by NovoEd into tables that belong to the customer in their Salesforce instance.

Pre-Requisites

Before installing the NovoEd Salesforce Sync app, please contact Customer Success for them to configure your organization in NovoEd for the app.

You will need to decide if you want to enable historical sync (all closed or ended courses) and let your Customer Success representative know this as well.

Additionally, tell NovoEd Customer Success if the Salesforce instance used is a sandbox/test instance vs a production instance as NovoEd must configure the connection to your organization differently to support a test/sandbox salesforce instance.

Finally, you must have a user that is both a Salesforce admin and a NovoEd Org admin to install and connect the NovoEd Sync app.

Note: If you are using multiple instances of Salesforce such dev, test, live etc. Please ensure to have separate accounts for each instance. Although it is possible to connect your instance using multiple Org admins, you will only need one unique one per instance.

Installation

After NovoEd Customer Success notifies you that your organization is enabled for the Salesforce Sync app, you may proceed with the installation

The Salesforce app can currently be installed by a Salesforce Admin with the following URL, modified for your custom domain as needed:

- https://login.salesforce.com/packaging/installPackage.apexp?p0=04t2L000000Iwgp

If a custom domain is used, then "login.salesforce.com" needs to be replaced with your custom domain.

- E.g.: If your custom domain is "myinstitution.my.salesforce.com
- Then you must replace "login.salesforce.com" with your domain, e.g. https://**myinstitution**.my.salesforce.com/packaging/installPackage.apexp?p0=04t2L000000Iwgp

This app will be marked as "Beta" at this time before it is submitted to App Exchange. This is planned in the future.

Please Note: When installing, give access to Admins only.

Install NovoEd Sync
By NovoEd, Inc.

Installing and granting access to admins Only...

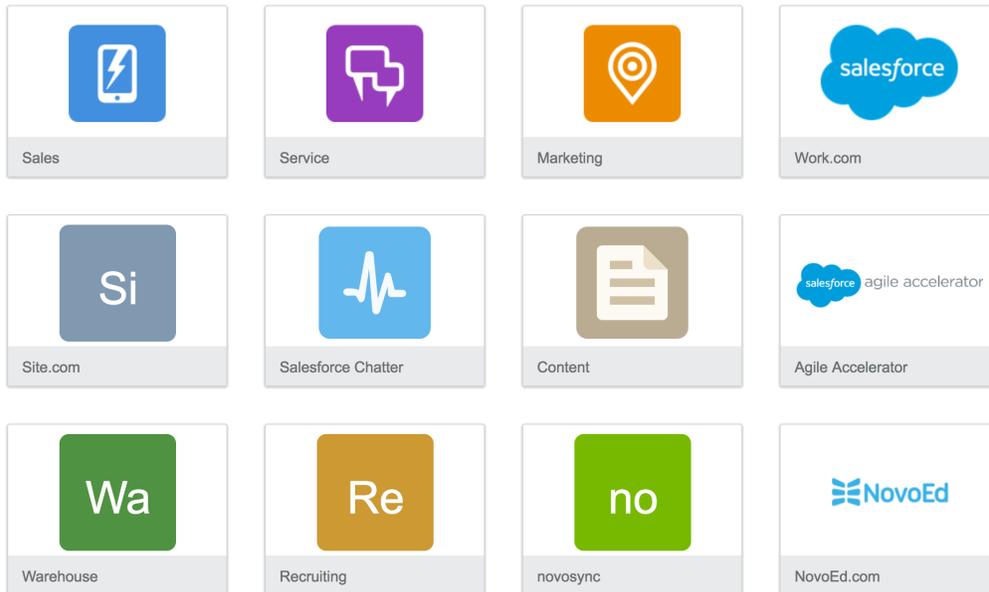| App Name	Publisher	Version Name	Version Number
NovoEd Sync	NovoEd, Inc.	development	1.0 (Beta 5)
Additional Details	View Components		

Launch and Connect App
The NovoEd app can be launched from the App Launcher in Salesforce in order to connect to NovoEd for syncing.

App Launcher

Launching will show a "NovoEd Setup tab that may be used to connect with NovoEd via OAUTH. Please authenticate to NovoEd with an Org Admin account.

When prompted to allow NovoEd.com to allow access to basic information and to access and manage your data, please select Allow.

Viewing Synced Data

After connecting, the app will sync course, enrollment, and user data. The app has tabs with default views for each of these data sources. You may also create custom views.

Data Dictionary

Here are the data sources that NovoEd will keep updated in NovoEd-controlled salesforce tables:
- Courses table
  - name
    - varchar(255) DEFAULT NULL
  - id
    - int(11) NOT NULL
  - catalog_id
    - varchar(255) NOT NULL, UNIQUE
  - parent_course_catalog_id
    - varchar(255) NOT NULL, UNIQUE
  - parent_course_id
    - int(11) NOT NULL
  - official_release_date
    - datetime DEFAULT NULL
  - release_date
    - datetime DEFAULT NULL
  - end_date
    - datetime DEFAULT NULL
  - close_date
    - datetime DEFAULT NULL
  - is_self_paced
    - tinyint(1) DEFAULT '0'
  - type_of_registration
    - int(11) DEFAULT '0'
    - Values:
      - 0 - Free and open to public
      - 1 - Paid
      - 2 - Free with paid certificate
      - 3 - Closed Enrollment
      - 4 - Open enrollment within your organization
  - enrollment_limit_in_days
    - int(11) DEFAULT NULL
  - description
    - text
- Learners table:
  - external_id
    - VARCHAR(255)

- first_name
  - varchar(255) NOT NULL
- last_name
  - varchar(255) NOT NULL
- email
  - varchar(255) NOT NULL
- Id
  - int(11) NOT NULL
- city
  - varchar(255) DEFAULT NULL
- state
  - varchar(255) DEFAULT NULL
- country
  - varchar(255) DEFAULT NULL
- headline
  - varchar(255) DEFAULT NULL
- Enrollments table:
  - user_id
    - int(11) NOT NULL
  - course_id
    - int(11) NOT NULL
  - enrollment_date
    - datetime DEFAULT NULL
  - completion_status: not passes, auto passed, manually passed
    - int(11) DEFAULT '0'
    - Values:
      - 0 -> not completed
      - 1 -> passed automatically
      - 2 -> manually granted passed status
  - auto_passed_at
    - datetime DEFAULT NULL
  - is_instructor
    - tinyint(1) DEFAULT '0'
  - is_teaching_assisstant
    - tinyint(1) DEFAULT '0'
  - is_mentor
    - tinyint(1) DEFAULT '0'
  - custom_role
    - varchar(255) DEFAULT NULL