

Test Taker Self Service Portal



Pre & Post Installation Document

R Systems International Ltd

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1 Change Summary

Sr #	Date	Version	Change Summary	Author
1	10/18/2019	V1.0	Initial Version	RSI Ltd.

2 Pre Install Steps:

2.1 Enable Communities

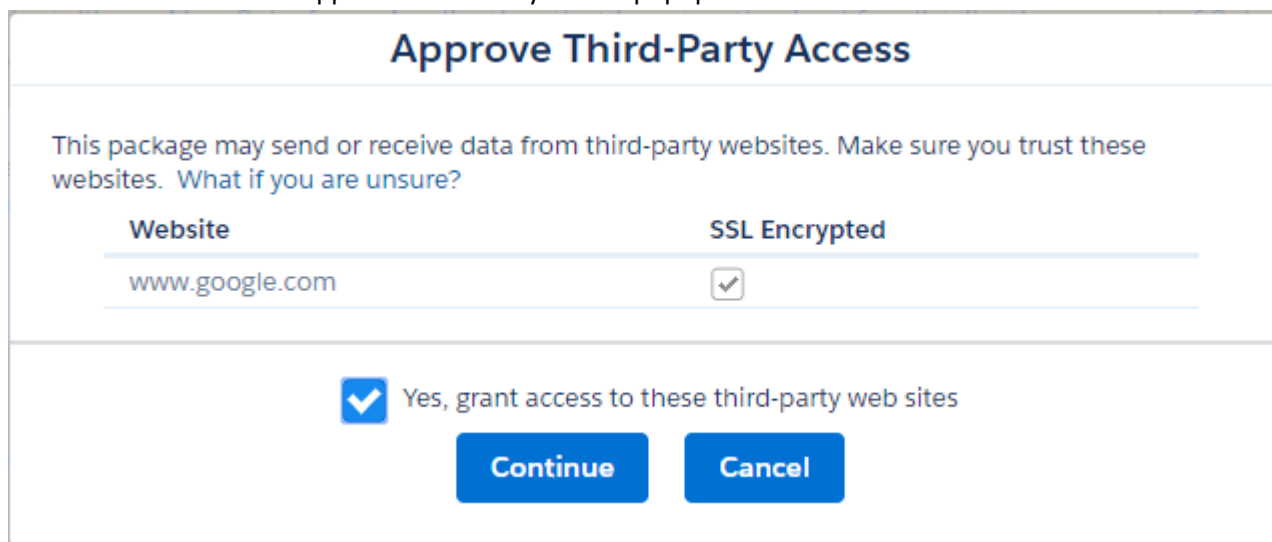
- Prior to installing this solution, ensure that you enable communities on your Org. The installation of this package will fail unless this step is completed.

2.2 Enable New Salesforce Mobile App

- Login to your Org and ensure that you go through the steps to enable the New Salesforce Mobile App and assign permission sets to access it to your users.

2.3 Approve Third Party access:

- There is one URL on the Approve Third-Party Access popup:



Website	SSL Encrypted
www.google.com	☒

☒ Yes, grant access to these third-party web sites

Continue **Cancel**

- **Website:** www.google.com
 - This URL is utilized for the reCAPTCHA service
 - You can disable this later if you do not want to use reCAPTCHA for the public community (Not Recommended)

3 Post Install Steps:

3.1 Create a Public Community:

- Create a community that is open for public access using the 'School Test Taker' community template
- Prior to performing any customizations, you may have to temporarily Disable reCAPTCHA as per Section 3.2.1 in this document
- Remove the 'RSI – Student Test Taker' component from the page and re-add it. This step is required to ensure that the component is loaded when the community is published.
- This will give you the recommended and best experience designed for the community

3.2 Community Theme Customizations:

- The following can be customized in the community:
 - Disable reCAPTCHA
 - Custom reCAPTCHA
 - CSS Settings

3.2.1 Disable reCAPTCHA

- In the Community Settings > Theme, click on the Gear Icon next to Theme Layout Component 'RSI - STS Portal Theme'
- You can check / uncheck the 'Disable reCAPTCHA?' Field to disable / enable the reCAPTCHA
- Note that this is not recommended when going live with the Community.
- This option's intended use is to allow customization of the community while in the builder.

3.2.2 Custom reCAPTCHA

- In case you intend to use a custom reCAPTCHA page other than the pre-built one, specify the Visual Force page name in this field.
- Please ensure that you do the following in code:
 - `parent.postMessage ("Human", 'REPLACE WITH ORIGIN URL AS SPECIFIED IN THE CUSTOM LABEL STS VFOrgin');`
- The Theme component listens for the keyword 'Human' to filter out the bots and allow access to the community

3.3 Profile Settings

- Open your Community in Builder and click on Settings
- Click on the Auto generated Guest User Profile name and edit it as per the below settings

3.3.1 System Permissions:

- Ensure that following Permissions are provided
 - API Enabled
 - Password Never Expires

3.3.2 Object Settings:

- At a minimum, following settings are required:

Object Type	Name	Read	Create	Edit	Delete	View All	Modify All
Standard	Account	✓					
Custom	Questions	✓				✓	
Custom	Answer	✓				✓	
Custom	Examinations	✓				✓	
Custom	Exam Score Setups	✓				✓	
Custom	Sessions	✓	✓	✓		✓	
Custom	Session Questions	✓	✓	✓		✓	
Custom	Session Answers	✓	✓	✓		✓	
Custom	STS Contacts	✓		✓		✓	

- Minimum Field Level Security settings are as follows:
 - Object:
 - Account: Default Settings. Customize it as per your requirements
 - Objects:
 - Questions: Read access to all fields
 - Answer: Read access to all fields
 - Examinations: Read access to all fields
 - Exam Score Setups: Read access to all fields
 - Objects:
 - Sessions: Read and edit access to all fields

- Session Questions: Read and edit access to all fields
- Session Answers: Read and edit access to all fields
- STS Contacts: Read and edit access to all fields

3.3.3 Enabled Apex Class Access

- Add the following Apex Classes here:
 - RSI_BoltSTS.STS_AccessChecker
 - RSI_BoltSTS.STS_ExamManager
 - RSI_BoltSTS.STS_ManageSession
 - RSI_BoltSTS.STS_MockreCAPTCHA
 - RSI_BoltSTS.STS_reCaptcha_v3
 - RSI_BoltSTS.STS_StudentProfileClass
 - RSI_BoltSTS.STS_TestAllClasses
 - RSI_BoltSTS.STS_UtilityClass
 - RSI_BoltSTS.STS_ViewResults

3.3.4 Enabled Visualforce Page Access

- Add the following Visualforce pages here:
 - RSI_BoltSTS.STS_AccessValidator
 - RSI_BoltSTS.STS_reCaptcha_v3

3.4 Site Guest User Setup

- Open the Guest user automatically created as part of the Community
- Edit this user and ensure that the following are as per requirements:
 - Email
 - Timezone

3.5 Enable Translation Workbench

- The application uses Custom Labels and to change their values you need to enable Translation Workbench in your org.
- Navigate to Setup > Translation Workbench > Translation Settings
- If not already enabled, click on the Enable button
- Under Supported Languages, Add English language to the list. Add the System Administrators as translators for English.
- For changing Custom Label values, open individual Custom Label and add values under the Translations section.

3.6 Google reCAPTCHA settings

- We are using the Google reCAPTCHA v3 with this application. It is interaction free and does the user verification without any user interaction.
- The reCAPTCHA is integrated with the Community Theme and renders by default.
- This is mandatory to have if you want to use the Community with reCAPTCHA.
- To allow reCAPTCHA execution, follow the below steps:
 - Open <https://www.google.com/recaptcha> in your browser
 - Click on Admin Console button on the right corner of the page and Sign in
 - Register a new site by following the on screen steps. Ensure that you select reCAPTCHA type as reCAPTCHA v3.
 - Add the following under Domains section:
 - force.com
 - visualforce.com
 - Google will automatically generate two Keys viz., Site Key and Secret Key
 - These values need to be updated in Salesforce as follows:

Salesforce Custom Label Name	Update Custom Label Value to?
STS_reCaptchaSiteKey	Google reCAPTCHA v3 Site Key value
STS_reCaptchaSecretKey	Google reCAPTCHA v3 Secret Key value

- Change the URLs on the following Custom Labels:

Salesforce Custom Label Name	Update Custom Label Value to?
STS_BaseURL	The Lightning URL for your community minus the Community Name
STS_VFOrigin	CarService_BaseURL label value plus String in quotes '/.lightning.force.com'

3.6.1 Customizing the reCAPTCHA page

- The reCAPTCHA page utilizes the following Custom Labels to populate text in various locations.

Label Name	Used For
STS_CommunityName	Name of the Vehicle Owner External Community. This shows up on reCAPTCHA page and Theme
STS_reCaptchaMsg	Message describing the purpose of the Community. This shows up on reCAPTCHA page