



RollCall 4 (v1.44 Spring 2023) Release Documentation

Enhancements and New Functionality

Overall

- Process Builders are deprecated and replaced with Flows
- All Flows are delivered with the ability to turn on and off specific pieces via Custom Metadata (custom settings). This gives you maximum flexibility to only rebuild pieces locally (like autoname) without having to understand or rebuild all of the custom functionality built into RollCall.
- All Flows have a corresponding unmanaged package that you can download and modify if you desire. Note that these and any of your local customizations are unsupported.
- New Report Type: RC4 Attendance that provides one row per attendance record with all related contact, course enrollment and session fields
- You can now change the presentation of your RollCall calendars - change the header background color, text color, determine whether the day number displays under the day of week or inline with it, and choose a method of sorting your calendar items that is not the default start date/time.
- We now deliver a page that can be included in a public Experience (e.g. Sites or Communities) so that your RollCall schedule can be displayed on the web, either directly via Salesforce or as an iframe embed in your web site. You can control what happens when someone clicks on the session link to, for example, route to a FormAssembly signup form that creates an enrollment record for the student. Note that any implementation of this is fully custom to your organization and not supported by HCA, but we'd be happy to provide guidance and implementation at an hourly rate.

Courses

- The unmanaged package "RC4 Campaign Sync" has been put into core functionality. This enables easier bulk communication with classes
- 12-hour time (AM/PM) comes with the new version for more familiar US-based time management
- New page layout for 12 hour time and one combined layout for administrators



Sessions

- The unmanaged package "RC4 Local - Add All Enrolled to Single Session" has been put into core functionality. This automatically creates Attendance records for all students with an Enrolled Status when a Session record is created manually.0
- When you change the date on a session, all linked attendance records will be auto-updated to reflect that change.
- Session fields contain more help text to describe what each one does and what it impacts

Course Enrollment

- The unmanaged package "RC4 Campaign Sync" has been put into core functionality. If your custom setting indicates you would like to use this functionality and link students to a campaign based on their enrollment status, RC will automatically add a Campaign Member for each student whose Enrollment Status equals "Enrolled" or your local equivalent.
- When a Course Enrollment is deleted, the linked Attendance records are also deleted.

Attendance

- Attendance records are not in a master/detail relationship to Course Enrollments and so were not automatically deleted. They are now able to be automatically deleted when a Course Enrollment is deleted.
- If you choose to link attendance (instead of course enrollment) to a campaign, the first time a student is moved from scheduled to attended they will also get a campaign member record created for them.

Bug fixes:

- Bug fix: In prior versions, when you manually created a session, the calendar would show "Undefined" in the start time unless you key in the start time in several places. We have fixed this behavior.
- You only need to enter the date and time data on a manually created session ONCE now; the required other fields will be auto-computed for you. Similarly for a changed session, just change the dates and/or times as needed and the rest will be computed for you.



Process Builder To Flows:

- All automations that were formerly delivered via Process Builders have been moved into Flows. Note that the Process Builders cannot be removed from the managed package – that’s just a Salesforce thing – but they are deprecated and can be deactivated after you upgrade.
- Unmanaged package functionality has been moved into core Flows. See “New Functionality” for full details.
- Most sections of the flow functionality can be separately controlled via custom settings, so that you can selectively disable just parts of the managed package to replace with your own.
- All flows are available as unmanaged packages so you can start from the core functionality and modify if/as needed. Please note that these are unsupported and meant for experienced architects and admins; we are happy to help for an hourly rate but modifying these crosses the line from software into customizations unique to you.



System Administrator Guide to Changes

Object: Courses

Automation Changes

- The process builder "RC4 - Course Automations" as well as the unmanaged Flows "RC4 Local - Create Campaign from Course," have been rolled into the single, **new Flow "RC4 - Course Automations"**. Full functionality:
 - Automatically updates future Sessions and all Course Enrollments to Course Was Canceled (or your local versions of these) – controlled by new setting "Course Cancel AutoUpdates"
 - Automatically updates Course Status based on Start and End dates – controlled by new setting "Course AutoUpdate Status"
 - Automatically creates a Campaign and links it to the Course – controlled by the new setting "Link Course to Campaign" (value of either Enrollment or Attendance)
 - The necessary automations are in place to support 12 hour time format (AM/PM) rather than 24-hour
- New unmanaged flow URL: **TBD**

New Custom Settings That Impact Courses

- **Course Cancel AutoUpdates** - (Course_Cancel_AutoUpdates) - if this is On it will allow the automated updates of Sessions and Enrollments when an entire course is canceled
- **Course AutoUpdate Status** - (Course_AutoUpdate_Status) - if this is On it will allow the automated setting of the Course Status based on the start and stop dates
- **Link Course to Campaign** - (Link_Course_to_Campaign) - if this is set to "Enrollment" or "Attendance" then the Flow will create a Campaign for each new Course
- **Course Time Setting** - (Course_Time_Setting) - If this is set to "12" it will invoke the automations around using a 12-hour time (am/pm) set of fields; otherwise it defaults to 24



Object: Sessions

Automation Changes

- The two process builders "RC4 - Session Autaname" and "RC4 - Session Is Canceled" as well as the unmanaged Flow "RC4 Local - Add All Enrolled to Single Session" have been rolled into the single, **new Flow "RC4 - Session Automations"**. Full functionality:
 - Automatically names a Session record to Coursename MM/DD/YY (US) or DD/MM/YY (international) – this is controlled by the new setting "Session Autaname"
 - Automatically renames a Session record with the above pattern if the Session Date changes – this is controlled by the new setting "Session Autaname"
 - Automatically updates all linked Attendance records' Name and Session Date fields if the Session Date changes – this is not separately controllable at this time
 - Automatically updates all linked Attendance records Attendance Status field to Canceled if the Session is Canceled – this is controlled by the new setting "Session Canceled Update Attendance"
 - Automatically creates Attendance records for all students with an Enrolled Status when a Session record is created manually as long as the "Manually Created Record" box is checked. This is controlled by the new setting "Session Enroll All Into One-Offs"
- New unmanaged flow URL: **TBD**

New Custom Settings That Impact Sessions

- **Session Autaname** - (Session_Autaname) - ensure it says On if you want to autaname Sessions
- **Session Enroll All Into One-Offs** - (Session_Enroll_All_Into_One_Offs) - ensure it says On if you want to auto-create attendance records for all enrolled students when you manually create a session record
- **Session Canceled Update Attendance** (Session_Canceled_Update_Attendance) - ensure it says On if you want all linked Attendance records to show 'Canceled' when the session itself is canceled



Object: Course Enrollments

Automation Changes

- The two process builders "RC4 - Course Enrollment Auto Name" and "RC4 - Course Enrollment - RC Functionality" as well as the unmanaged Flow "RC4 Local - Sync Enrollments to Campaign" have been rolled into the single, **new Flow "RC4 - Course Enrollment Automations"**. Full functionality:
 - Automatically names a Course Enrollment record to StudentFirst Student Last CourseName - this is controlled by new custom setting "Course Enrollment Autaname"
 - Automatically creates Attendance records for all Sessions if the student's status is Enrolled; if the Starting Session is set, it creates records for that and all Sessions after it; if the Starting Session is not set, it creates records for all Sessions today and afterward - this is controlled by the new custom setting "Course Enrollment Create Attendance"
 - Automatically updates all linked Attendance records when the Enrollment Status is changed to Dropped; if the Drop As Of is set, it drops only those Attendance Records on or after the Drop As Of session, otherwise it drops as of Today and in the future. Note it will only drop Attendance records still marked as Scheduled so that no data is lost. - this is controlled by the new custom setting "Course Enrollment Update Attend on Drop"
 - Automatically adds a Campaign Member for each Enrolled student - this is controlled by new setting "Link Course to Campaign" when it is set to "Enrollment"
- **New Flow "RC4 - Course Enrollment Delete Automations"**
 - When a Course Enrollment is deleted, this deletes the linked Attendance records. – this is controlled by the new setting "Enrollment Delete All Attendance"
- New unmanaged flow URLs:
 - **TBD**
 - **TBD**



New Custom Settings That Impact Course Enrollments

- **Course Enrollment Autname** - (Course_Enrollment_Autname) - ensure it says On if you want to have autonamed records
- **Course Enrollment Create Attendance** - (Course_Enrollment_Create_Attendance) - ensure it says On if you want to auto-create attendance records when you enroll a student
- **Course Enrollment Update Attend on Drop** - (Course_Enrollment_Update_Attend_on_Drop) - ensure it says On if you want to automatically update all linked Attendance records whose status is Scheduled when a student drops the course. Highly recommended to do this, otherwise the student will remain on your attendance rosters - the only reason to turn it off is to override it with a local setting while leaving the other pieces in place.
- **Link Course to Campaign** - (Link_Course_to_Campaign) - if this is set to "Enrollment" then the Flow will create a Campaign Member for each Enrolled student to aid in bulk communications
- **Enrollment Delete All Attendance** - (Enrollment_Delete_All_Attendance) - If this is On then all linked Attendance records will be automatically deleted when a Course Enrollment is deleted. Default is on.



Object: Attendance

Automation Changes

- The process builder "RC4 - Attendance Auto Name" as well as the unmanaged Flow "RC4 Local - Sync Attendance with Campaign" have been rolled into the single, new Flow "RC4 - Attendance Automations". Full functionality:
 - Automatically names the Attendance record in the format of Student First Student Last Session Name - controlled by new custom setting "Attendance Autaname"
 - Automatically creates a Campaign Member for attended students - controlled by new custom setting "Link Course to Campaign" (value is "Attendance")
- New unmanaged flow URL: **TBD**

New Custom Settings That Impact Attendance

- **Attendance Autaname** - (Attendance_Autaname) - if this is On it will autaname the Attendance records in the pattern of StudentFirst Student Last Session Name
- **Attendance Attended Value** - (Attendance_Attended_Value) - default of Attended, you can update this to control the behavior of the campaign sync if you change the primary Attended value



All New Custom Settings

- **Course Cancel AutoUpdates** - (Course_Cancel_AutoUpdates) - if this is On it will allow the automated updates of Sessions and Enrollments when an entire course is canceled
- **Course AutoUpdate Status** - (Course_AutoUpdate_Status) - if this is On it will allow the automated setting of the Course Status based on the start and stop dates
- **Course Time Setting** - (Course_Time_Setting) - If this is set to "12" it will invoke the automations around using a 12-hour time (am/pm) set of fields; otherwise it defaults to 24
- **Session Autname** - (Session_Autname) - ensure it says On if you want to autname Sessions
- **Session Enroll All Into One-Offs** - (Session_Enroll_All_Into_One_Offs) - ensure it says On if you want to auto-create attendance records for all enrolled students when you manually create a session record
- **Session Canceled Update Attendance** (Session_Canceled_Update_Attendance) - ensure it says On if you want all linked Attendance records to show 'Canceled' when the session itself is canceled
- **Course Enrollment Autname** - (Course_Enrollment_Autname) - ensure it says On if you want to have autonamed records
- **Course Enrollment Create Attendance** - (Course_Enrollment_Create_Attendance) - ensure it says On if you want to auto-create attendance records when you enroll a student
- **Course Enrollment Update Attend on Drop** - (Course_Enrollment_Update_Attend_on_Drop) - ensure it says On if you want to automatically update all linked Attendance records whose status is Scheduled when a student drops the course. Highly recommended to do this, otherwise the student will remain on your attendance rosters - the only reason to turn it off is to override it with a local setting while leaving the other pieces in place.
- **Link Course to Campaign** - (Link_Course_to_Campaign) - if this is set to "Enrollment" then the Flow will create a Campaign Member for each Enrolled student to aid in bulk communications
- **Enrollment Delete All Attendance** - (Enrollment_Delete_All_Attendance) - If this is On then all linked Attendance records will be automatically deleted when a Course Enrollment is deleted. Default is on.
- **Attendance Autname** - (Attendance_Autname) - if this is On it will autname the Attendance records in the pattern of StudentFirst Student Last Session Name
- **Attendance Attended Value** - (Attendance_Attended_Value) - default of Attended, you can update this to control the behavior of the campaign sync if you change the primary Attended value
- **Calendar Field for Sort**
- **Calendar Header Text Color**
- **Calendar Header Background Color**



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- **Calendar Header for Day Compressed?**
 - **Calendar Header for Week Compressed?**
 - **Calendar View Public**
 - **Public Calendar Field for Sort**
 - **Public Calendar Header Text Color**
 - **Public Calendar Header Background Color**
 - **Public Calendar Click Field**
 - **Public Calendar Click Open New Tab?**

Control Calendar Header Color and Sort

You can now change the presentation of your RollCall calendars - change the header background color, text color, determine whether the day number displays under the day of week or inline with it, and choose a method of sorting your calendar items that is not the default start date/time. The following custom metadata settings control this functionality:

- **Calendar Field for Sort**
- **Calendar Header Text Color**
- **Calendar Header Background Color**
- **Calendar Header for Day Compressed?**
- **Calendar Header for Week Compressed?**



Publicly-Available Calendar

You can now display your RollCall calendar separately in a public or semi-public (logged-in community) setting and control the display and click actions differently than your internal calendars. Please note that setting up a community, public site, or any web page that is a result of the click action is beyond the scope of your RollCall license fee but we are happy to provide paid hourly support if desired.

You will need to install the unmanaged package RC4 CSRF VF for Communities:

<https://login.salesforce.com/package/installPackage.apexp?p0=04t5e000000zNPG>

This package assists in embedding the RollCall custom VF pages into a Community experience and must remain unmanaged due to the way Salesforce deploys community and site resources.

New Visualforce page: RC_Public - this page can be displayed via a community experience. The header, styling, and action that occurs on click of a session are fully configurable using the custom metadata changes.

- **Calendar View Public**
- **Public Calendar Field for Sort**
- **Public Calendar Header Text Color**
- **Public Calendar Header Background Color**
- **Public Calendar Click Field**
- **Public Calendar Click Open New Tab?**

New Trigger

RC_Session_Dates is a newly deployed trigger that helps manage the session dates and times for manually created sessions.



Upgrade Guide

PLEASE [REACH OUT](#) TO US FOR ASSISTANCE! You are welcome to proceed on your own but we can help ensure this goes smoothly and quickly.

Preparation for the Upgrade

1. Assess all of your existing RollCall-based automations to see if you can just install the upgrade without any further customization.
 - a. The following Process Builders are delivered by the RC Managed Package and will need to be deactivated after the upgrade:
 - i. RC4 - Session Autaname
 - ii. RC4 - Session Is Canceled
 - iii. RC4 - Course Enrollment Auto Name
 - iv. RC4 - Course Enrollment - RC Functionality
 - v. RC4 - Course Automations
 - vi. RC4 - Attendance Auto Name
 - b. **CRITICAL STEP: Assess all local automations, including RC4 Unmanaged Packages.** These will be Flows and Process Builders whose triggering object is Course, Course Enrollment, Session, or Attendance.
 - i. **RC4 Unmanaged Packages:**
 1. **RC4 Add Students to Manual Session**
 - a. Flows:
 - i. RC4 Local - Add All Enrolled to Single Session
 - b. Fields:
 - i. Session: Manually Created Session
 2. **RC4 Support 12 Hour Time**
 - a. Prepare for a minor data load post-install – you will need to bulk load the date/time fields in the unmanaged package fields listed below into their managed-package equivalents.
 - b. Flows:
 - i. RC4 Local - Course with 12 Hr Time CREATED
 - ii. RC4 Local - Course with 12 Hr Time UPDATED
 - c. Fields:
 - i. Course: Mon AM or PM
 - ii. Course: Mon Start Time
 - iii. Course: Tues AM or PM



- iv. Course: Tues Start Time
- v. Course: Wed AM or PM
- vi. Course: Wed Start Time
- vii. Course: Thurs AM or PM
- viii. Course: Thurs Start Time
- ix. Course: Fri AM or PM
- x. Course: Fri Start Time
- xi. Course: Sat AM or PM
- xii. Course: Sat Start Time
- xiii. Course: Sun AM or PM
- xiv. Course: Sun Start Time
- d. Validation Rules:
 - i. Course: Correct_time_format_local
- e. Global Picklist Values:
 - i. RC Course AMPM
 - ii. RC Course Time

3. RC4 Campaign Sync

- a. Prepare for a minor data load post-install – you will need to bulk load the campaign in the unmanaged package field “Linked Campaign” to its managed-package equivalent.
 - b. Flows:
 - i. RC4 Local - Sync Enrollments to Campaign
 - ii. RC4 Local - Create Campaign from Course
 - iii. RC4 Local - Sync Attendance with Campaign
 - c. Fields:
 - i. Session: Course Linked Campaign
 - ii. Course: Linked Campaign
 - d. Buttons:
 - i. Session: Email Students
 - ii. Course: Email Students
- ii. **Your own locally built Process Builders and Flows**
- 1. Is the functionality you built now incorporated into the upgrade? If so you should plan to deactivate your local automations as well.
 - 2. Did you make extensive customizations?
 - a. If so you may want to plan to deactivate some or all of the natively-delivered flows in the update and continue using your own.
 - b. Alternately you may want to download the unmanaged package versions of the new flows and modify them with your own local customizations.



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- c. Please note that supporting your own local customizations is not part of RollCall support but we would be happy to assist for an hourly charge.
- c. Decide which of the new functionality you want to enable. **Our recommendations** for a baseline system most similar to the existing RC are:
- i. **Course Cancel AutoUpdates** - On
 - ii. **Course AutoUpdate Status** - On
 - iii. **Course Time Setting** - 24 (unless you have been using the 12-hour time unmanaged package, in which case set this to 12)
 - iv. **Session Autaname** - On
 - v. **Session Enroll All Into One-Offs** - On
 - vi. **Session Canceled Update Attendance** - On
 - vii. **Course Enrollment Autaname** - On
 - viii. **Course Enrollment Create Attendance** - On
 - ix. **Course Enrollment Update Attend on Drop** - On
 - x. **Link Course to Campaign** - Off
 - xi. **Enrollment Delete All Attendance** - On
 - xii. **Attendance Autaname** - On
 - xiii. **Attendance Attended Value** - Attended
 - xiv. **Calendar Field for Sort** - [leave empty]
 - xv. **Calendar Header Text Color** - [leave empty]
 - xvi. **Calendar Header Background Color** - [leave empty]
 - xvii. **Calendar Header for Day Compressed?** - [leave empty]
 - xviii. **Calendar Header for Week Compressed?** - [leave empty]
 - xix. **Calendar View Public** - [leave empty]
 - xx. **Public Calendar Field for Sort** - [leave empty]
 - xxi. **Public Calendar Header Text Color** - [leave empty]
 - xxii. **Public Calendar Header Background Color** - [leave empty]
 - xxiii. **Public Calendar Click Field** - [leave empty]
 - xxiv. **Public Calendar Click Open New Tab?** - [leave empty]

Performing the Upgrade

1. Deactivate each of the Process Builders that are delivered with the RollCall Managed Package:
 - a. RC4 - Session Autaname



- b. RC4 - Session Is Canceled
 - c. RC4 - Course Enrollment Auto Name
 - d. RC4 - Course Enrollment - RC Functionality
 - e. RC4 - Course Automations
 - f. RC4 - Attendance Auto Name
2. If you have installed any of the RC4 unmanaged packages listed below, deactivate the related Flows. Full list of possible Flows from unmanaged packages:
 - a. RC4 Local - Add All Enrolled to Single Session
 - b. RC4 Local - Course with 12 Hr Time CREATED
 - c. RC4 Local - Course with 12 Hr Time UPDATED
 - d. RC4 Local - Sync Enrollments to Campaign
 - e. RC4 Local - Create Campaign from Course
 - f. RC4 Local - Sync Attendance with Campaign
3. Get a full data backup of your Salesforce and confirm that the RC objects (Course, Course Enrollment, Sessions and Attendance, all prefixed with hcarc4_) are in the exported CSVs.
4. Perform the upgrade by clicking the "Get it Now" link on the AppExchange.
5. If you have installed local/unmanaged package RC4 Add Students to Manual Session
 - a. Uninstall the unmanaged package if you are able. If you cannot:
 - i. Delete the custom field on Sessions: "Manually Created Session" – there is no need to retain any data from this field.
 - ii. Delete the flow RC4 Local - Add All Enrolled to Single Session
6. If you have installed local/unmanaged package RC4 Support 12 Hour Time:
 - a. Temporarily deactivate the Course Validation Rule Correct_time_format
 - b. Bulk update your Course records to copy data from all of the local/unmanaged fields for AMPM and Start Time into the same fields delivered by the upgrade.
 - c. Uninstall the unmanaged package if you are able. If you cannot:
 - i. Delete the flows:
 1. RC4 Local - Course with 12 Hr Time CREATED
 2. RC4 Local - Course with 12 Hr Time UPDATED
 - ii. Delete the validation rule:
 1. Course: Correct_time_format_local
 - iii. Delete the local fields:
 1. Course: Mon AM or PM
 2. Course: Mon Start Time
 3. Course: Tues AM or PM
 4. Course: Tues Start Time
 5. Course: Wed AM or PM
 6. Course: Wed Start Time



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7. Course: Thurs AM or PM
 8. Course: Thurs Start Time
 9. Course: Fri AM or PM
 10. Course: Fri Start Time
 11. Course: Sat AM or PM
 12. Course: Sat Start Time
 13. Course: Sun AM or PM
 14. Course: Sun Start Time
 - iv. Delete the local version of the global picklist values:
 1. RC Course AMPM
 2. RC Course Time
 - d. Reactivate the Course Validation Rule Correct_time_format
 7. If you have installed local/unmanaged package RC4 Campaign Sync
 - a. Bulk update your Course records to copy data from the Linked Campaign field into the same field delivered by the upgrade.
 - b. Uninstall the unmanaged package if you are able. If you cannot:
 - i. Delete the flows:
 1. RC4 Local - Sync Enrollments to Campaign
 2. RC4 Local - Create Campaign from Course
 3. RC4 Local - Sync Attendance with Campaign
 - ii. Delete the local buttons:
 1. Session: Email Students
 2. Course: Email Students
 - iii. Delete the local fields:
 1. Session: Course Linked Campaign
 2. Course: Linked Campaign
 8. Adjust new custom settings.
 - a. Navigate to Setup->Custom Metadata Types->RC Config and click "Manage Records"
 - b. Ensure each of these has a value. Click "Edit" next to each, add your desired setting (determined during preparation), and save.
 9. Page Layout Changes:
 - a. Sessions:
 - i. Add "Manually Added Session" to Session layout
 - ii. If you are using the Campaign Link functionality, add the Email Students button to your page layout
 - b. Courses:
 - i. If you are using 24-hour time, no changes are necessary
 - ii. If you are using 12-hour time, assign the new page layout "Course Layout for 12-Hour Time" to all users



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- iii. If desired, you can assign the new page layout “Admin Course Layout” to systems administrators. This just helps with troubleshooting - 12 hour time simply automatically translates into underlying 24-hour time and updates the controlling fields so that all other RC automations work correctly.
 - iv. If you are using the Campaign Link functionality:
 - 1. Add Linked Campaign field to your page layout
 - 2. Add the Email Students button to your page layout if you are using this functionality.

10. Test it all out