

# Spring 17 Upgrade Instructions (From Winter 17)

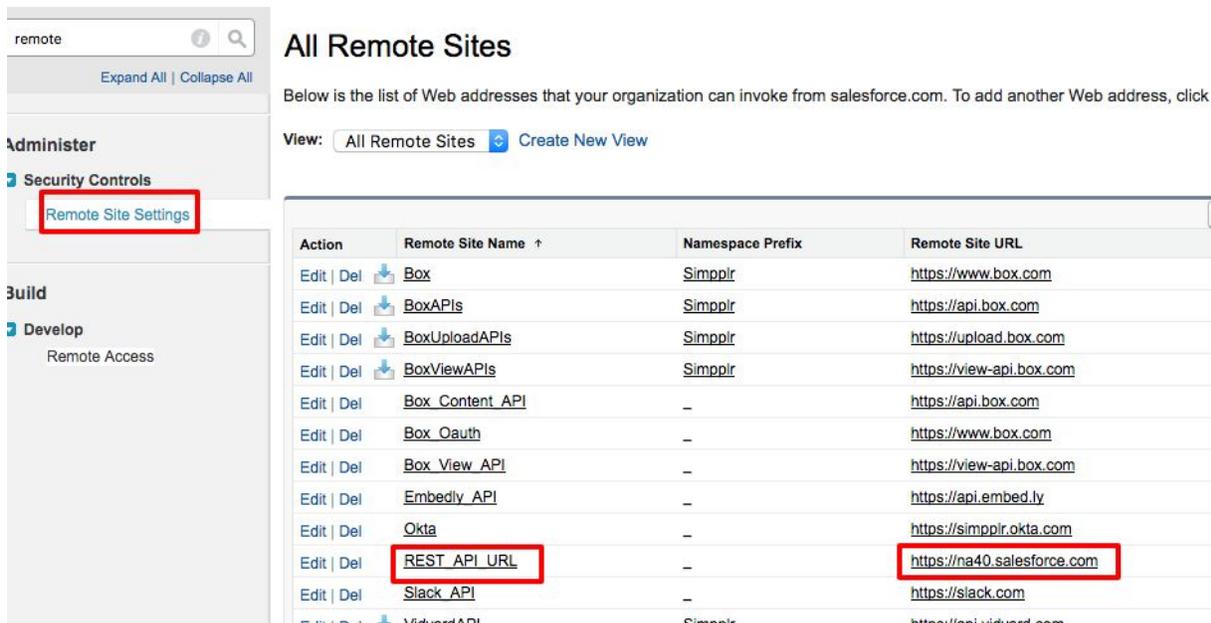
Please upgrade Simpplr during off business hours. There will be some down time users cannot access Simpplr during the upgrade process.

Please also go through the following instructions from **Salesforce Classic**.

## Preinstallation check (Sandbox only):

Go to Salesforce Setup, search for “Remote Site Settings”.

Please double check the “REST API URL” is pointing to the sandbox server. If you just refreshed the sandbox, the Remote Site URL might still be pointing to production. Click “Edit” to change the url.



**All Remote Sites**

Below is the list of Web addresses that your organization can invoke from salesforce.com. To add another Web address, click

View: All Remote Sites Create New View

Action	Remote Site Name ↑	Namespace Prefix	Remote Site URL
Edit   Del	Box	Simpplr	https://www.box.com
Edit   Del	BoxAPIs	Simpplr	https://api.box.com
Edit   Del	BoxUploadAPIs	Simpplr	https://upload.box.com
Edit   Del	BoxViewAPIs	Simpplr	https://view-api.box.com
Edit   Del	Box_Content_API	-	https://api.box.com
Edit   Del	Box_Oauth	-	https://www.box.com
Edit   Del	Box_View_API	-	https://view-api.box.com
Edit   Del	Embedly_API	-	https://api.embed.ly
Edit   Del	Okta	-	https://simpplr.okta.com
Edit   Del	REST API URL	-	https://na40.salesforce.com
Edit   Del	Slack_API	-	https://slack.com
Edit   Del	VirvardAPI	Simpplr	https://ani.virvard.com

Installation url:

Production:

<https://login.salesforce.com/packaging/installPackage.apexp?p0=04t90000000cF6V>

Sandbox:

<https://test.salesforce.com/packaging/installPackage.apexp?p0=04t90000000cF6V>

Once you clicked on the link, select “All Users” and click “Upgrade”. Installation will take a little while. Once you have received an email from Salesforce about the installation is successful, take the following post installation steps:

- Go to Salesforce Setup > Installed Packages and click “Simplr”.
- Click “View” next to “Post Installation Instructions”.
- Click “Start Migration”, enter “confirm” and click “confirm”. The migration might take a little while. Please refresh the page to see the number of pending batches to run. When the migration completes, you should see “Migration completed successfully”

#### POST INSTALL SETUP

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Initial Setup

Initial setup completed successfully

Migration

Total number of batches to run: 21

Pending number of batches: 21

Start Migration

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- Once the migration completes, click “Start Import” to import site title images.

POST INSTALL SETUP

Initial Setup

Initial setup completed successfully

Migration

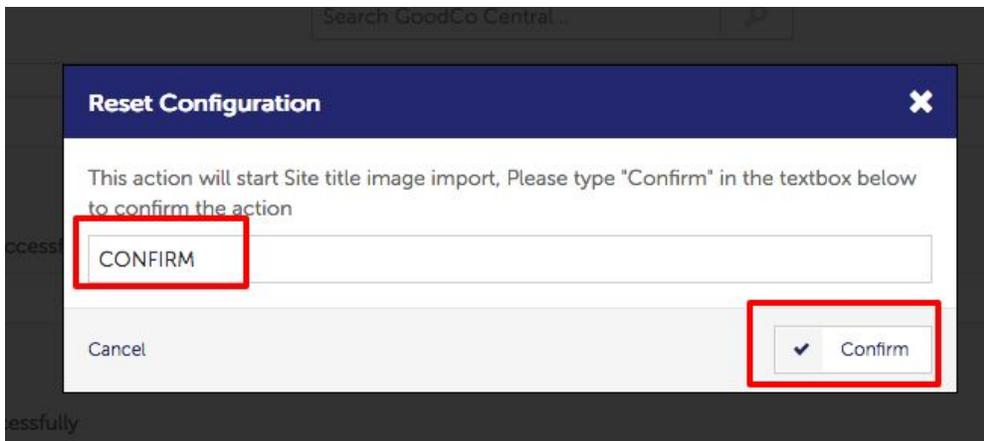
Migration completed successfully

Import Site title images

Number of site title images to be imported: 15

Start Import

- Enter "Confirm" and click "Confirm".



- Refresh the page.
- When import completes, the post install setup page should look like this.

## POST INSTALL SETUP

### Initial Setup

Initial setup completed successfully

### Migration

Migration completed successfully

### Import Site title images

Site title image import completed successfully

If you want to monitor the migration and import process, you can go to Salesforce Setup> Apex Jobs and see the progress.

## Enable “Unlisted Group” in Chatter

In Spring 17 release, we start to support Unlisted Sites. In order for this to work, Unlisted Groups has to be enabled in Chatter.

Go to Salesforce Setup, search for “Chatter Settings”.

If “Enabled Unlisted Groups” is not checked, click “Edit”.

Check the box next to “Enable Unlisted Groups” and “Save”

chatter

Expand All | Collapse All

Help for this Page

### Chatter Settings

Chatter is a corporate network that lets your users work together, talk to each other, and share information, all in real time.

Save Cancel

#### Chatter Settings

Turn on Chatter and Global Search features. We have given you a head start—your users may auto-follow a few people or records by default and your search box is in the header. [Learn More...](#)

Enable

#### Groups

Modify Chatter group settings.

Allow Group Archiving

Allow Records in Groups

Enable Unlisted Groups

In the Salesforce user interface, only group members and users with the Manage Unlisted Groups permission can access information in unlisted groups. However, Apex code runs in system mode and developers working with Apex can access and display this information on Visualforce pages.

To limit access via Apex, we recommend that you:

- Review the limitations of this feature
- Check existing Apex code and Visualforce pages that display group information.
- Use sharing checks in your Apex code to restrict access to authorized users.

For more information, see the Salesforce Help.

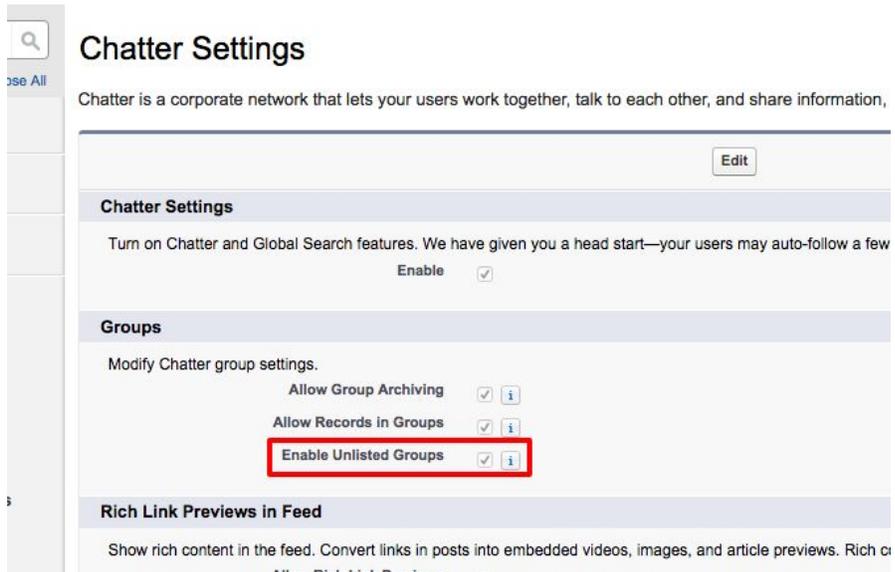
I want to enable unlisted groups and understand that I may need to update Apex/Visualforce code in my organization.

#### Rich Link Previews in Feed

Show rich content in the feed. Convert links in posts into embedded videos, images, and article previews. Rich content is provided by Embed.ly, a third-party service. Previews are only available for links to supported sites. We don't share any private content with Embed.ly, just the URL.

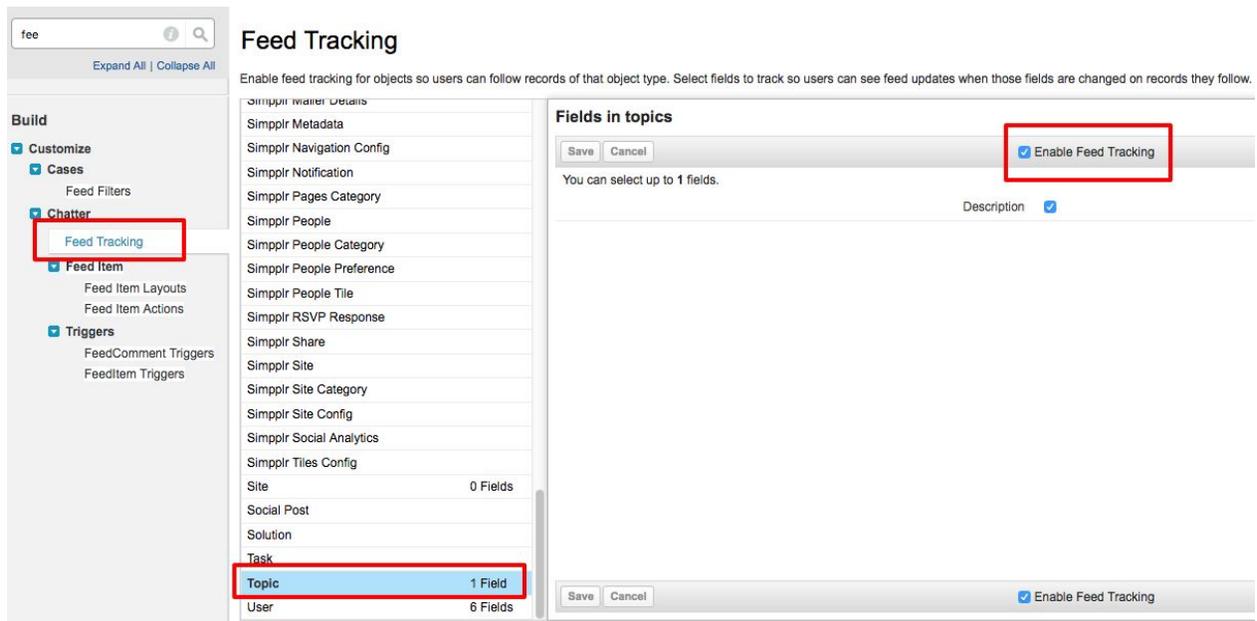
Allow Rich Link Previews

Once it is enabled, “Enable Unlisted Groups” should be checked.



## Enable Topic Feed Tracking

Go to Salesforce Setup, search for “Feed Tracking”. Go to the “Topic” object, make sure “Enable Feed Tracking” is checked.



## Schedule Newsletter

Go to Simplr, go to “Manage Application” > “Setup” > “Schedulers”. Click on the drop down arrow for “SchedulerNewsletter” and click “Schedule”.

MANAGE APPLICATION				Setup	People	Launchpad	Integrations
				Storage	Email	Schedulers	Troubleshooting
NAME				LAST RUN	NEXT RUN	OPTIONS	
SchedulerBatchPendingApprovalDigest				N/A	N/A	▼ □	
SchedulerBatchAddUsersToMandatorySites				N/A	N/A	▼ □	
SchedulerBatchInsertPeopleRecords				N/A	N/A	▼ □	
SchedulerUserDataSync				N/A	N/A	▼ □	
SchedulerBatchTopStories				N/A	N/A	▼ □	
SchedulerBatchEmailDigest				N/A	N/A	▼ □	
SchedulerBatchNotificationDigest				N/A	N/A	▼ □	
SchedulerAnalytics				Mar 29, 2017 at 1:00am	Mar 30, 2017 at 1:00am	▼ □	
SchedulerNewsletter				N/A	Mar 29, 2017 at 8:00pm	▼ □	