**ERP Package Deployment Process**

pde4 - Development Packaging Org

dev-qa-ff - Development QA Org

Rootstock ERP - Package Name

rstk – Namespace Prefix

**Package Creation**

1. Move file changes from pde5 to pde4 using Force.com IDE
   1. Create Force.com project – Map project to pde5
   2. Add files to project
   3. Compare custom object differences between source and target org.  Ensure changes to objects are in order.
      1. Verify List Views have not been lost or incorrectly added
      2. Verify there are no object changes that violate packaging rules
      3. Verify there are no object changes that are still in WIP
   4. Run a trial validation deployment to pde4 and resolve any errors
   5. Deploy project files to pde4
   6. Compare custom object differences between source and target org.  Make necessary manual changes in target org.   These changes will also need to be made in customer base (page layouts, picklists, web links, deactivating validation rules, etc…).
2. Create major/minor package release.  The release can include new files, changes to existing files and custom object changes.  The following tasks are done in the pde4 packaging org.
   1. Run all test classes
      1. Setup | Develop | Apex Classes
      2. Select the “Run All Tests” button
      3. Note: This step can take up to 30 minutes.  Any failures must be addressed before proceeding with the package upload.  A successful run will indicate total Code Coverage percentage which must be 75% or greater before the package can be uploaded.
      4. Comment out any failed test classes and run those test classes separately to confirm they are commented out
      5. Note any failed test classes and create a ticket for development to look at the test classes
   2. Compile all classes
      1. Setup | Develop | Apex Classes
      2. Select the “Compile all classes” link
   3. Verify the “Is Valid” checkbox is set on all Apex Classes
   4. Needs to be done in FireFox. Profile permissions must be updated if new objects, classes or pages are added to the package.  This is necessary in order to test programs using a profile other than System Administrator.
      1. Objects
         1. Setup | Manage Users | Profiles
         2. Select “RS Baseline Platform Users” profile link
         3. Verify Custom Object Permissions are NOT set for new objects
            1. Objects that always have access:

[Accounts](https://na12.salesforce.com/00eU0000000MxBe?s=ObjectsAndTabs&o=Account)

[Application Security](https://na12.salesforce.com/00eU0000000MxBe?s=ObjectsAndTabs&o=01IU0000000BauT)

[Company Master](https://na12.salesforce.com/00eU0000000MxBe?s=ObjectsAndTabs&o=01IU0000000Bay7)

[Contacts](https://na12.salesforce.com/00eU0000000MxBe?s=ObjectsAndTabs&o=Contact)

[Division Addresses](https://na12.salesforce.com/00eU0000000MxBe?s=ObjectsAndTabs&o=01IU0000000BayD)

[Division Master](https://na12.salesforce.com/00eU0000000MxBe?s=ObjectsAndTabs&o=01IU0000000BayC)

[Documents](https://na12.salesforce.com/00eU0000000MxBe?s=ObjectsAndTabs&o=Document)

[Ideas](https://na12.salesforce.com/00eU0000000MxBe?s=ObjectsAndTabs&o=Idea)

[Manufacturing Users](https://na12.salesforce.com/00eU0000000MxBe?s=ObjectsAndTabs&o=01IU0000000Bayf)

[Menu](https://na12.salesforce.com/00eU0000000MxBe?s=ObjectsAndTabs&o=01IU0000000BavL)

* + - 1. Repeat the above for “RS Full Access Platform Users” profile but ensure the Custom Object Permissions are set for new objects
         1. Objects that have no access:

[Coaching](https://na12.salesforce.com/00eU0000000MxAC?s=ObjectsAndTabs&o=WorkCoaching)

[D&B Companies](https://na12.salesforce.com/00eU0000000MxAC?s=ObjectsAndTabs&o=DandBCompany)

[Data Dictionary](https://na12.salesforce.com/00eU0000000MxAC?s=ObjectsAndTabs&o=01IU0000000Baud)

[Feedback](https://na12.salesforce.com/00eU0000000MxAC?s=ObjectsAndTabs&o=WorkFeedback)

[Feedback Questions](https://na12.salesforce.com/00eU0000000MxAC?s=ObjectsAndTabs&o=WorkFeedbackQuestion)

[Feedback Question Sets](https://na12.salesforce.com/00eU0000000MxAC?s=ObjectsAndTabs&o=WorkFeedbackQuestionSet)

[Feedback Requests](https://na12.salesforce.com/00eU0000000MxAC?s=ObjectsAndTabs&o=WorkFeedbackRequest)

[Feedback Templates](https://na12.salesforce.com/00eU0000000MxAC?s=ObjectsAndTabs&o=WorkFeedbackTemplate)

[Goal Links](https://na12.salesforce.com/00eU0000000MxAC?s=ObjectsAndTabs&o=WorkGoalLink)

[Goals](https://na12.salesforce.com/00eU0000000MxAC?s=ObjectsAndTabs&o=WorkGoal)

[Inventory Controls](https://na12.salesforce.com/00eU0000000MxAC?s=ObjectsAndTabs&o=01IU0000000Baf7)

[Push Topics](https://na12.salesforce.com/00eU0000000MxAC?s=ObjectsAndTabs&o=PushTopic)

[Streaming Channels](https://na12.salesforce.com/00eU0000000MxAC?s=ObjectsAndTabs&o=StreamingChannel)

* + 1. Apex Classes
       1. Setup | Manage Users | Profiles
       2. Select “RS Baseline Platform Users” profile link
       3. Select “Enabled Apex Class Access” link
       4. Select Edit button
       5. Move rstkpde4 classes to “Enabled Apex Classes” and Save
       6. Repeat the above for “RS Full Access Platform Users” profile
    2. Visualforce Pages
       1. Setup | Manage Users | Profiles
       2. Select “RS Baseline Platform Users” profile link
       3. Select “Enabled Visualforce Page Access” link
       4. Select Edit button
       5. Move rstkpde4 pages to “Enabled Visualforce Pages” and Save
       6. Repeat the above for “RS Full Access Platform Users” profile
  1. The Application Security object must be updated if new pages and/or custom objects are added to the package that affect the menu.
     1. Setup | Security Controls | Field Accessibility
     2. Select Application Security link
     3. Select View by Profiles link
     4. Choose the “RS Baseline Platform Users” profile
     5. Set Field Access to Hidden for any new fields
     6. Repeat the above for “RS Full Access Platform Users” profile except set Field Access to Editable
        1. 5 Fields will always be hidden for RS Full Access Profile
           1. Formula External ID
           2. Formula Search Index
           3. Obsolete
           4. Obsolete
           5. Search Index
  2. Display the package UI screen
     1. Setup | Create | Packages
     2. Select Rootstock ERP package
  3. Add any new package components to the package
     1. Components tab | Add button
     2. Select the Component Type, the components and Add To Package button
     3. Note: You cannot add components from multiple Component Types in a single session
     4. Classes, Static Resources, and Pages always push all files in these three components
  4. Upload the new package
     1. Setup | Create | Packages
     2. Select Rootstock ERP package
     3. Select the Upload button
     4. Note: The upload UI screen takes about 30 minutes to render
     5. Enter Version Name
     6. Version Number increments automatically
     7. Set Release Type to Managed Release
     8. Select Upload button
     9. Note: The upload takes about 2 hours.  SF emails the package installation URL when complete.

1. Create new pde4\_menu\_xx.xx.csv file from pde4 with any new menu records or menu record changes. Either re-export all menu records in pde4 or create new CSV file from previous file if no changes occurred.
2. Update helpsetup.csv file with any new records. Commit to SVN. These records are required for ERP/RSF Page Help.
3. Deploy package to target org.  The following tasks are done in the dev-qa-ff org.
   1. Log into dev-qa-ff
   2. Copy and paste the package installation URL into the browser (takes a few minutes to render UI)
   3. You can review the changes in the Package Components section
   4. Select the Continue button
   5. On the Step 1 page select the Next button
   6. On the Step 2 page select the “Select security settings” radio button
      1. Select “RS Baseline Platform Users” access level for the “RS Baseline Platform Users” profile
      2. Select “RS Full Access Platform Users” access level for the “RS Full Access Platform Users” profile
      3. Note: This applies any new object/class/page permissions to the target org profiles
      4. Select the Next button
   7. On the Step 3 page select the Next button
      1. Note: The install takes about 60 minutes or more depending on the amount of changes.  SF emails the installation results when complete.
   8. Apply Manual Steps to dev-qa-ff and dev-qa
      1. When running scripts make sure to put rstk. In front of a script executor script
4. Create Patch Org

**Patch Creation – Immediately after upload is successful**

1. Create patch release – This option can be used in place of creating a major/minor release if the changes are limited to simple code changes.  No new files and or object changes are allowed in a patch release.
   1. Create patch org.  Note: Multiple patch releases can be created from the same patch org within the same major.minor version.
   2. LOG-IN: [admin@rstk\_1.173.patch](mailto:admin@rstk_1.173.patch)
   3. Password: R00tst0ck
   4. STEPS TO CREATING PATCHING ORG
      1. Log into the pde4 packaging org
      2. Setup | Create | Packages
      3. Select Rootstock ERP package
      4. Select the Patch Organizations tab
      5. Select the New button
      6. Select the appropriate release version
      7. Make a note of the User Name
         1. Put in RS support email (rs-support@rootstock.com)
      8. Select the Save button
      9. Note: A SF org will be created with the meta-data of this release.  SF sends an email when complete.  Takes about 45-60 minutes.
   5. Pass controllerextn.cls files in patchorgreset project to patch org
      1. Project needs to be mapped to patch org
      2. Don’t push anything in yellow, red, or green. EVERYTHING MUST BE GRAY
   6. Delete New Components
      1. ‘Defer
      2. ‘EditDescription
      3. ‘LogACall
      4. ‘NewCase
      5. ‘NewEvent
      6. ‘NewNote
      7. ‘NewTask
      8. ‘UpdatePriority
      9. ‘UpdateStatus
   7. Compile all classes – make sure no invalid classes
   8. If move a class file or trigger file, need to run test classes associated with other files in ticket
   9. Copy patched files to the patch org using Force.com IDE
      1. Note: Only changes to existing files can be patched.  New files or object changes cannot be patched.
      2. Create project in eclipse for specific patch and add files for patch to project. Map project to pde5
      3. When deploying project- login into patch org login and deploy
      4. After Deployment- check to make sure the correct files are in the patch (Apex Classes, VisualForce Pages, etc.)
      5. Deploy the same files to pde4 – doing so now will ensure we don’t miss them on the next full release
   10. Upload patch release
       1. Log into the patch org
       2. Setup | Create | Packages
       3. Click Upper Right Corner (Developing Rootstock ERP)
       4. Select Rootstock ERP package
       5. Select the Upload button
       6. Note: The upload UI screen takes about 20 minutes to render
       7. Enter Version Name
       8. Version Number is automatically set
       9. Set Release Type to Managed
       10. Select Upload button
       11. Note: The upload 1-2 hours.  SF emails the package installation URL when complete.
   11. Deploy patch to target org
       1. Log into the pde4 packaging org
       2. Setup | Create | Packages
       3. Select Rootstock ERP package
       4. Select the Versions tab
       5. Select the Push Upgrades button
       6. Select Schedule Push Upgrade button
       7. Select the appropriate Version
       8. Select the appropriate Organization Name (dev-qa-ff is org ID 00DE0000000bXSU)
       9. Select the Schedule button