**Financials Package Creation Process**

pde4f - Packaging Org

qa-rsf - QA Org

Rootstock Financials - Package Name

rstkf – Namespace Prefix

**Package Creation**

1. Compare object differences between pde5f and pde4f using DiffDog. Update the release ticket master list and note any potential manual steps.
2. Make corrections to List Views
3. Deploy file changes from pde5f to pde4f using Force.com IDE
   1. Create Force.com project mapped to pde5f
   2. Add files to project for all tickets in the master list
   3. Remove references to packageVersions in meta.xml files for classes, components, pages and triggers using Notepad++
   4. Run a trial validation deployment to pde4f and resolve any errors
   5. Deploy project to pde4f
4. Refresh object project and compare object differences again and apply manual steps to pde4f. Note that some manual steps will not be necessary in pde4f but will be required in customer orgs.
5. Review manual steps in ticket master list and apply any steps to pde4f
6. NEVER DELETE COMPONENTS IN PDE4F – there are a few exceptions like object validation rules and list views – any other deletes need to be reviewed
7. Fix object and field-level security in profiles:
   1. System Administrator
      1. Set field-level security for any new fields (object permissions are automatically added)
   2. RSF Full Access Users
      1. Set field-level security for any new fields
      2. Edit profile and enable all permissions for any ‘new’ objects
8. Profile permissions must be updated if new classes or pages are added to the package:
   1. Apex Classes
      1. Setup > Manage Users > Profiles
      2. Select “RSF Full Access Users” profile link
      3. Select “Enabled Apex Class Access” link
      4. Select Edit button
      5. Move rstkf classes to “Enabled Apex Classes” and Save - DO NOT INCLUDE rstk FILES
   2. Visualforce Pages
      1. Setup > Manage Users > Profiles
      2. Select “RSF Full Access Users” profile link
      3. Select “Enabled Visualforce Page Access” link
      4. Select Edit button
      5. Move rstkf pages to “Enabled Visualforce Pages” and Save - DO NOT INCLUDE rstk FILES
9. The Application Security object must be updated if new pages and/or custom objects are added to the package that affects the menu.
   1. Setup > Security Controls > Field Accessibility
   2. Select Application Security link
   3. Select View by Profiles link
   4. Verify all fields are set to Editable for “RSF Full Access Users” profile
10. Create package release in pde4f
    1. Compile all classes
       1. Setup > Develop > Apex Classes
       2. Select the “Compile all classes” link
    2. Run all test classes – WAIT FOR COMPILE ALL CLASSES TO COMPLETE
       1. Setup > Develop > Apex Classes
       2. Select the “Run All Tests” button
    3. Resolve Test Class Failures
       1. Failures due to ‘connection issues’ must be rerun
       2. For hard failures, temporarily comment out the offending code (possibly all the code) in the test class in order to proceed with the release. Create a ticket listing all failed test classes in order for development to address later.
       3. Note that total Code Coverage percentage must be 75% or greater before the package can be uploaded.
    4. Verify the “Is Valid” checkbox is set on all Apex Classes
    5. Display the package UI screen
       1. Setup > Create > Packages
       2. Select Rootstock Financials package
    6. 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. Include all files for these components:
          1. Apex Classes
          2. Apex Triggers
          3. Email Templates
          4. Static Resources
          5. Visualforce Components
          6. Visualforce Pages
       5. Skip these components:
          1. App
             1. Force.com
          2. Field Set
             1. Custom Fields
          3. Non-Financials List Views
          4. Non-Financials Page Layouts
          5. Profile Settings
          6. Remote Sites
    7. Upload the new package
       1. Setup > Create > Packages
       2. Select Rootstock Financials package
       3. Select the Upload button
       4. Enter Version Name
       5. Version Number increments automatically
       6. Set Release Type to **Managed Release** (never create a beta release unless there is a specific purpose – installing a beta release into a org will make the release unusable and the package and data will have to be deleted)
       7. Select Upload button
       8. Note: The upload takes about 1 hour.  SF emails the package installation URL when complete.
11. Create patch org
    1. From the package UI, select the Patch Organizations tab
    2. Select New button
    3. Login: [admin@rstkf\_xx.yy.patch](mailto:admin@rstkf_xx.yy.patch) (where xx.yy = major.minor release version - this will automatically be set based on the latest release version)
    4. Email: rs-support@rootstock.com
    5. An email is sent when the process completes
    6. When logging into the patch org, set password to R00tst0ck
    7. Note: Multiple patch releases can be created from the same patch org within the same major.minor version.
12. Follow procedure for upgrading appropriate orgs and update the new version on the Rootstock Org CRM record

**Patch Creation**

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.
   1. Deploy 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. After Deployment, verify the correct files are in the patch org (Apex Classes, VisualForce Pages, etc.)
   2. Compile all classes
      1. Setup > Develop > Apex Classes
      2. Select the “Compile all classes” link
   3. Run test classes
      1. WAIT FOR COMPILE ALL CLASSES TO COMPLETE
      2. Setup > Develop > Apex Classes
      3. Run for any Apex Classes included in the patch or run all test classes to be safe
   4. Resolve Test Class Failures
      1. Failures due to ‘connection issues’ must be rerun
      2. For hard failures, temporarily comment out the offending code (possibly all the code) in the test class in order to proceed with the release. Create a ticket listing all failed test classes in order for development to address later.
      3. Note that total Code Coverage percentage must be 75% or greater before the package can be uploaded.
   5. Verify the “Is Valid” checkbox is set on all Apex Classes
   6. Upload the patch release
      1. Setup > Create > Packages
      2. Select Rootstock Financials package
      3. Select the Upload button
      4. Version Number is automatically set
      5. Set Release Type to Managed
      6. Select Upload button
      7. Note: The upload takes about 30 minutes.  SF emails the package installation URL when complete.