Upgrading the 3.5 Package to the Latest Patch

Upgrading the 3.5 package[1] to the latest patch describes the major tasks involved to upgrade an environment with a previously installed version number of the 3.5 package to the newly released patch.

[1] The 3.5 package was originally labeled with the Version Name of the Common Ground package, which was Common Ground 3.5 or Common Ground Version 3.5. When Luminate CRM was rolled out in early 2011, the Luminate CRM label was applied retroactively to the Common Ground packages and Common Ground 3.5 was displayed as the Luminate CRM 3.5 package.

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Implementation Notes:

- Read the following instructions entirely before you start the upgrade process to prepare yourself about what to expect and the amount of time.

- You **MUST** perform the steps in the order presented and complete each step before starting the next one in order to avoid problems with the installation.

- The pages in package installer may take longer times to load, but does not reflect the typical page loading times users will experience with the actual system.

- Before you begin installing the package, it is important to request that all users log out and remain logged out until this upgrade process is complete to avoid unexpected results.

IMPORTANT: Initially performing an upgrade in a **sandbox** environment can help avoid issues that may affect the production instance and allow you to familiarize yourself with new features before releasing them to users. For more information about obtaining a sandbox, refer to Real-time Sandbox Environments at http://www.salesforce.com/platform/cloud-infrastructure/sandbox.jsp.

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Starting the Upgrade

The new package automatically upgrades the instance installed with the 3.5 package with any new features and fixes to reported issues in the previous versions.

1. Notify users that you are going to be upgrading the system and they should log out immediately.

2. Access the 3.5 Package
   (https://secure2.convio.net/customer/commonground/v35/CommonGround_UpgradePath.htm)

3. On the **Salesforce Login** page that displays, log in with your System Administrator user name and password.

4. On the **Package Upgrade Details** page, verify that in the **Installed Version Information** section (which displays below the Package Upgrade Details), the:

   - Version Name = 3.5

   - Version Number = 3.3 or higher

5. If the:

   - **Version Name is not 3.5**, quit now and upgrade to the 3.5 Package. (Refer to https://secure2.convio.net/customer/commonground/v35/UpgradeToV3.5.htm.)

   - Information is correct, click the **Continue** button.

After a short wait, the **Step1. Approve Package API Access** page displays.

Step 1. Approve Package API Access

The API Access permissions control access to the various objects and users in your Common Ground environment by this package, which should be consistent with the way your current Common Ground is functioning unless you have altered package API access since originally obtaining your Common Ground trial.

For details about API and Dynamic Apex access in packages in general, Editing Security Profiles (a Salesforce help topic) at
https://help.salesforce.com/apex/HTViewHelpDoc?id=editing_client_security_profile.htm&language=en.

1. On the **Approve Package API Access** page, review the permissions to be sure they are consistent with the way the current Common Ground is functioning and then **Next**.

   Note: If you are unsure about the settings, click **Cancel** to discontinue this process until you want to continue.

   After a short wait, the **Step 2. Choose Security Level** page displays.

Step 2. Choose Security Level

The security level in the profiles sets the permissions that a user with that profile can do (for example, a day-to-day task like entering donations or an administrator task like configuring a default value). Salesforce provides a Standard User profile that has full access to the standard object features for performing day-to-day Salesforce environment tasks but it cannot be modified to accommodate the Common Ground objects.

To add the full permissions that allow users to modify Common Ground objects, the Common Ground Standard User profile must be available.

The **Select security settings** option must be selected to set the appropriate access level for the Common Ground Standard User profile. If the Common Ground Connector to Convio Online Marketing(COM) is installed, the Connector profile access level must also be set.

Notes:
- Existing profiles will not be affected automatically by the upgrade process.
- For information about security levels, refer to the [Salesforce security help topic](https://help.salesforce.com/apex/HTViewHelpDoc?id=distribution_installing_packages.htm&language=en) (https://help.salesforce.com/apex/HTViewHelpDoc?id=distribution_installing_packages.htm&language=en).

1. On the **Choose security level** page, click the **Select security settings** option.
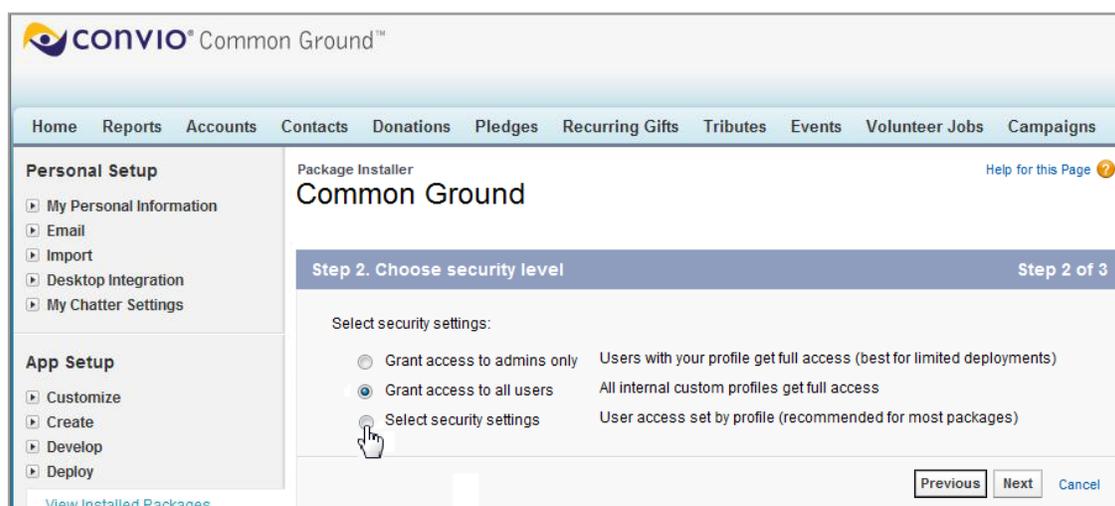
2. From the **Profiles** displayed, click the **Common Ground Standard User** drop-down list and click the **Common Ground Standard User** option.

3. If the Connector for Common Ground (to Convio Online Marketing, or COM) is installed on the site, click the **Convio Connector** drop-down list and click the **Convio Connector** option.

4. Make sure the profile settings all look correct and make any necessary changes.

5. When you are finished, click the **Next** button.

After a short wait, the **Step3. Install Package** page displays.

Step 3. Install Package

The **Ignore Apex test failures** checkbox must be enabled to prevent the package installation from failing. This is important because the package installs many components as inactive and later on runs unit tests in which these components may need to be active. Failures may forcibly halt the installation even though everything is behaving as expected and is successful.

WARNING: Not clicking this checkbox can cause the installation to fail or be significantly delayed for no apparent reason.

1. On the **Install Package** page, click the checkbox labeled **Ignore Apex test failures that may cause the installed application not to function properly**.
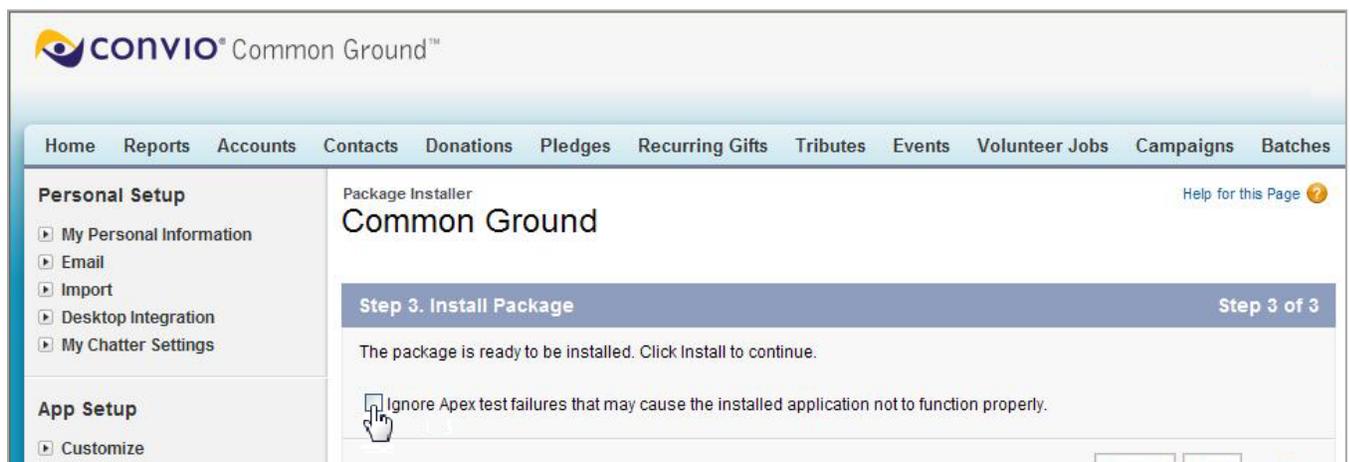
2. Click the **Install** button. A progress message displays to let you know the package is installing.

After about 15 minutes, you should receive an email that confirms the success of the package installation and you are finished.

If this email **States that your upgrade has failed**, review the error messages.
Note: The **Assertion Failed** message means that the **Ignore Apex Test Failures** checkbox in Step 3 was not checked and you must repeat the package installation steps again to click this checkbox.

If this email **does not arrive after 15 minutes**, first check the **Junk** folder in your mailbox to be sure it was not diverted.

If you cannot find the email, check directly in the instance to see if the package has been upgraded:

1. At the top of a page, click your name and then click **Setup**.

2. In the **App Setup** area in the left sidebar, click **View Installed Packages**. If Version Number **3.9.7** is in the list, the instance has been upgraded and you are finished.

If the package is not in the list, wait about 5 more minutes and repeat the steps above to determine if it was delayed.

If the correct Version Number does not display in the list after 10-15 minutes, you must repeat the package installation process again.

Notes:
- Repeating the package installation will not cause problems.
- If the installation continues to be unsuccessful, contact Convio Common Ground Support at http://support.convio.com.