

Upgrading to Common Ground 2011b

Upgrading your instance of Common Ground to version 2011b consists of installing the package, running a script, performing a few manual steps, and verifying the upgrade. The entire process should take approximately one hour. Double-check to ensure that **one and only one person** from your organization will undertake the upgrade process.

During the upgrade process, users should log out of Common Ground and refrain from using it until the process is complete. If users are logged in to the system during the upgrade, they may experience unexpected results, but it will not cause the upgrade to fail or other long-term problems.

Common Ground strongly recommends that you read the following instructions entirely before you start the upgrade process so you know what to expect. You must perform these steps in the order they appear, and complete each step before starting the next one.

Sandbox Upgrade Testing

The Force.com platform lets you test a package install without affecting your production instance of Common Ground. Using a sandbox, you can perform a trial run of the upgrade procedure and make certain the result functions the way you expect before allowing your users access to the new features. As long as your Common Ground license is installed on an active Salesforce instance (not a trial), you can obtain a sandbox and use it to test the upgrade. For more information about sandboxes and instructions for obtaining and creating them, read the article [Force.com Sandbox](#).

To install into your sandbox, you will use a different link than to install into your production Common Ground instance.

For Sandbox Installation ONLY, use this link instead of the link in Step 1 below:

<https://test.salesforce.com/packaging/installPackage.apexp?p0=04tA00000002I5F>

Prerequisites for Upgrading Common Ground

You must meet the following requirements in order to upgrade to Common Ground 2011b:

- You must have Common Ground v2011a or later installed. To check your current version of Common Ground, look under the Quick Help section of the left sidebar in Common Ground. The current version number is displayed at the bottom of the section.
- Your user profile must be **System Administrator**. All the steps in this document assume that you are logged in as the administrator for your instance of Common Ground. If you have multiple credentials you use to log in to Common Ground, you must use your administrator credentials when performing the upgrade.

Part 1: Installing the Common Ground 2011b Package

Before you begin the installation process, notify your users that you are upgrading Common Ground and request that they log out of the system and stay logged out until you have completed the upgrade. If users are logged in before the upgrade is complete, they may experience unexpected results.

The following procedures have been divided into several steps for ease of use. Complete every step, and the procedures within the steps, in order.

Pre-Install: Review the upgrade summary

1. Follow this link:
<https://login.salesforce.com/packaging/installPackage.apexp?p0=04tA00000002I5F>
If you are not already logged in, the standard Common Ground login page will display.
2. Log in using your administrator username and password. The first screen in the force.com package installer will display.
Note: The pages in the package installer will load much more slowly than Common Ground usually loads. This is normal behavior.
3. You will see information about the package to be installed and the currently installed versions. Under Package Upgrade Details, the Version Name should be **2011b**. Under Installed Version Information, the Version Name should be **2011a** or **2011a.1**, as shown in the following screenshot.

Package Upgrade Details

Package Name	Convio Common Ground
Version Name	2011b
Version Number	5.0.3
Publisher	Convio, Inc.
Description	Convio Common Ground release 2011b

Installed Version Information	
Package Name	Convio Common Ground
Version Name	2011a
Version Number	4.39.1

[Continue](#) [Cancel](#)

Note: The **Version Number** might read a different 5.x number. That is expected.

4. You can scroll down the page to review the Package Components section, which contains a detailed list of components that will be updated and a brief summary of what will be done to each item. After you have reviewed the pending changes, click the **Continue** button. The Package Installer page displays.

Step 1: Approve package API access

From the Package Installer: Convio Common Ground page:

1. Review the Package Installer page, as shown in the following screenshot.

The screenshot shows the 'Package Installer' interface for 'Convio Common Ground'. It is titled 'Step 1. Approve Package API Access' and 'Step 1 of 3'. The page explains that these settings control API access for s-controls and other components. It lists permissions for 'Package Custom Objects' (all granted), 'Extended Object Permissions' (all granted), 'General User Permissions' (all granted), and 'Administrative Permissions' (all granted). At the bottom, there are 'Next' and 'Cancel' buttons.

	Read	Create	Edit	Delete		Read	Create	Edit	Delete
Accounts	✓	✓	✓	✓	Ideas	✓	✓	✓	✓
Assets	✓	✓	✓	✓	Leads	✓	✓	✓	✓
Campaigns	✓	✓	✓	✓	Opportunities	✓	✓	✓	✓
Cases	✓	✓	✓	✓	Price Books	✓	✓	✓	✓
Contacts	✓	✓	✓	✓	Products	✓	✓	✓	✓
Contracts	✓	✓	✓	✓	Solutions	✓	✓	✓	✓
Documents	✓	✓	✓	✓					

This screen allows you to review permissions that Common Ground is requesting in order to continue installing the upgrade package. Unless you have altered package API access since you originally obtained your Common Ground trial, these settings are consistent with the way your current Common Ground is functioning.

2. Click the **Next** button to continue installing the upgrade package.
3. If you do not want to grant this access to Common Ground, click the **Cancel** button to abort the upgrade process. This will end the upgrade process and return you to your pre-2011b instance of Common Ground.

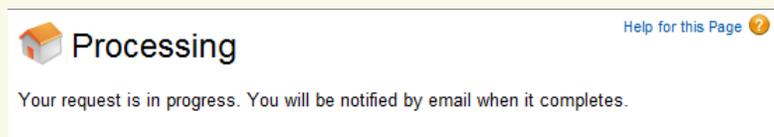
For more details about API and Dynamic Apex access in packages in general, read [this Salesforce help article](#).

Step 2: Choose security level

In this step, determine which user types will have access to Common Ground. In order for all new features in 2011b to work correctly, you should select **Grant access to all users**. Click the **Next** button.

Step 3: Install package

From the Step 3: Install Package screen, click the **Install** button. The package installer will begin processing your request to install Common Ground 2011b, as shown in the following screenshot.



Step 4: Verify successful package installation

After the installation is complete, you will receive an email letting you know you may proceed. It may get caught in your junk email filters. Under ordinary circumstances, this email should arrive less than 15 minutes after you click the **Install** button, and will look like this:



If you receive an email that states your upgrade has failed, review the error messages. If you still have not received an email message after about 15 minutes, check to see that the package has been upgraded directly in your Common Ground instance.

To verify that the package has successfully been installed, look under the Quick Help section of the left sidebar in Common Ground. The current version number is displayed at the bottom of the section. The version number should now be 2011b.

If the version number is not 2011b, try waiting a few minutes and reloading the page. You may need to start over and repeat the instructions in **Part 1: Installing the Common Ground 2011b Package**. Repeating the package installation following the Part 1 instructions will not cause any problems. If the installation continues to be unsuccessful, submit a case at the Support Desk, available via the Resource Center tab within Common Ground.

After the package has been upgraded, proceed to *Part 2: Running the Upgrade Tool*. You must complete Part 2 or else the upgrade will not function correctly.

Part 2: Running the Upgrade Tool

The Convio Common Ground team has developed an upgrade tool to execute tasks associated with the upgrade process.

Complete the following steps to run the upgrade tool.

1. While logged in to Common Ground as a System Administrator, click the **Utilities** tab.
2. Under the **Upgrade Tools** section, click the **Complete 2011b Upgrade** button, as shown in the following screenshot.

Upgrade Tools

Common Ground
2011b Upgrade Tool

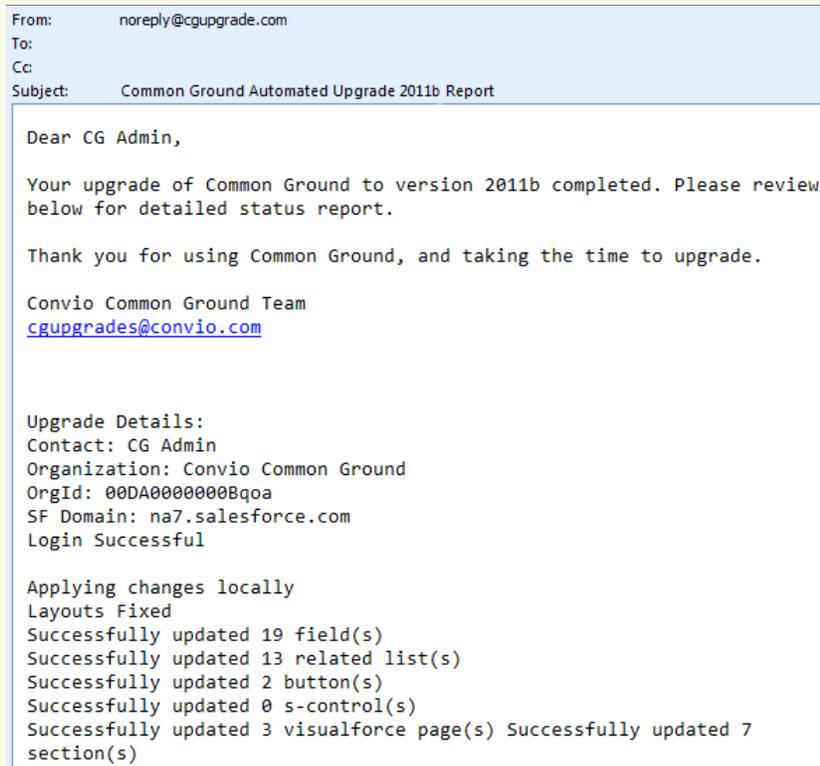
System Administrators Only - Please read the [Common Ground 2011b Upgrade Guide](#) for full step-by-step instructions to complete the upgrade to Common Ground 2011b prior to running this tool. This process has never been run.

Complete 2011b Upgrade

- The upgrade may take a few minutes to run, and an **Upgrade in Progress** message might display next to the button in the meantime. Do not click the button a second time, even if the Upgrade in Progress message does not appear immediately. An **Upgrade Complete** message displays next to the button when the upgrade tool is finished.

Important: Do not log out of Common Ground until the upgrade tool completes, although you can close the Common Ground Upgrade Utility window. The upgrade tool will use your current session ID, and if that ID ceases to be valid, parts of the upgrade might fail.

- Check your email. When the upgrade tool finishes processing, you will receive an email message with the results, as shown in the following screenshot.



The above screenshot is an excerpt of the email message you will receive if the upgrade tool is successful. If you receive this email, it is safe to continue to the manual configuration steps.

If your email message begins with the text, "Your upgrade of Common Ground to version 2011b had errors that require your attention," you can either run the process again, or review the list of errors in the message and correct any you find. If you continue to encounter problems, submit a case at the Support Desk, available via the Resource Center tab within Common Ground.

Part 3: Manual Security Updates

Complete the following manual upgrade procedures related to security. You must complete these processes if you want Common Ground to work correctly.

Adding VisualForce Pages to Common Ground Fundraising User Profile

Complete the following steps to add VisualForce pages to the Common Ground Online User profile, most importantly the `cx_Contact_Supporter_Center_Access` page.

If you are using the old Salesforce profile viewer

- Click your username at the top of any page and from the drop-down menu, click **Setup**.
- Under Administration Setup in the left sidebar, click **Manage Users** to expand the list.

3. Click **Profiles** to display the Profiles page.
4. From the list of profiles, click the **Common Ground Online User** profile name.
5. Scroll down the profile page, about three-quarters of the way down, to the Enabled Visualforce Page Access section. Click the **Edit** button.
6. From the Enable Visualforce Page Access page, move the **cx_Contact_Supporter_Center_Access** page from the left column (Available Visualforce Pages) to the right column (Enabled Visualforce Pages)
7. Click the **Save** button.

If you are using the recently upgraded Salesforce profile viewer

1. Click your username at the top of any page and from the drop-down menu, click **Setup**.
2. Under Administration Setup in the left sidebar, click **Manage Users** to expand the list.
3. Click **Profiles** to display the Profiles page.
4. From the list of profiles, click the **Common Ground Online User** profile name.
5. In the Apps section, click **Visualforce Page Access** to display the Visualforce Page Access list.
6. Click the **Edit** button to change access settings.
7. From the Visualforce Page Access page, move the **cx_Contact_Supporter_Center_Access** page from the left column (Available Visualforce Pages) to the right column (Enabled Visualforce Pages).
8. Click the **Save** button.

Part 4: Republishing CGF Forms

If you are using Common Ground Fundraising, your published online forms have not been changed by the upgrade. If you want to take advantage of the new online form-related features in Common Ground 2011b, such as HTML5 and the ability to customize or disable email notifications, you must republish your online forms.

From the Status Page for the published online form, go to the Publish section and click the **Publish Changes** button. This will update the online form for 2011b.

Your Upgrade is Complete

Congratulations! Once you have completed these steps, you have successfully upgraded Common Ground to 2011b. You may notify your users that they may log back into the system, resume work, and begin taking advantage of the new features. Remember to click the Resource Center tab for updated reference materials, user guides and other supporting resources.