



Installing/Migrating GridBuddy from Sandbox into a Target Org

1. Install GridBuddy from the AppExchange In Target Environment

- a. Install GridBuddy (6.12) in SandBox and Production using “Get it Now” link on [AppExchange](#)
- b. Login to the AppExchange as follows:
 - i. First log in with Production credentials to the AppExchange
 - ii. Select “Sandbox” for Sandbox installs
 - iii. Log in again using Sandbox credentials and use the “Custom Domain” option to define the Sandbox URL
 - iv. Proceed with the installation
- c. During the install process, you need to assign profile access.
 - i. This selection determines whether you give GridBuddy profile access to just Admins, certain Profiles, or all Users.
 - ii. Install for “Admins Only” for Production install and assign permissions for end users later, either via profile or permission set (see step #4).
 - iii. Full steps available in the [Getting Started Guide](#)
- d. If additional Org IDs are needed for this change, the AppBuddy team will need 2 business days to turn around the request
- e. Notify the AppBuddy team to activate Production licenses
- f. Sandbox licenses will be automatically activated

2. Migrate Change Set Configuration from Sandbox

- a. Create an outbound change set that includes Salesforce artifacts to be migrated:
 - i. Salesforce tabs created for grids - (Tabbed Page Tabs)
 - Salesforce custom Tab 1
 - Salesforce custom Tab 2
 - ii. Visualforce pages
 - GBTabs_VF page 1
 - GBTabs_VF page 2
 - iii. Permission Sets -
 - *Please provide the names of all the GridBuddy permission sets*
 - *Grid Admins*

- *End Users*
 - iv. GRidBuddy Lightning Components -
 - *Please add Lightning components referencing to GridBuddy*
 - v. Deploy Change Set to Target Environment
3. **Export 'GridBuddy Settings' from the Source Environment**
- a. GridBuddy Settings is a custom object where the Grid Configuration settings are stored as individual records.
 - b. Use Data Loader to export **new** Grids from GridBuddySettings (GBLite__GridBuddySettings__c)
 - c. Select the following columns for export:
 - ii. Custom CSS File
 - iii. Custom JS File
 - iv. Default Definition
 - v. Definition
 - vi. Grid Name
 - vii. GridBuddySettings Name
 - b. Use multiple filter conditions to only return
 - i. Default Definition = TRUE (This is the grid configuration excluding User Defined Filters)
 - ii. Grid Name = Grid 1, Grid 2, Grid 3, Grid 4, Grid 5
 - iii. Sample SOQL query:
 1.

```
SELECT GBLite__Custom_CSS_File__c, GBLite__Custom_JS_File__c,
          GBLite__Default_Definition__c, GBLite__Definition__c,
          GBLite__Grid_Name__c, Name FROM GBLite__GridBuddySettings__c
          WHERE GBLite__Default_Definition__c = true AND
          (GBLite__Grid_Name__c = 'Grid 1' OR GBLite__Grid_Name__c = 'Grid 2'
          ' OR GBLite__Grid_Name__c = 'Grid 3' OR GBLite__Grid_Name__c =
          'Grid 5' OR GBLite__Grid_Name__c = 'Grid 5' )
```
 - c. Extract the file
 - d. Save this file as a CSV file with the name `GridsToInsert.csv`
4. **Export 'GB Global Meta' from the Source Environment**
- a. GB Global Meta is a custom object where the Meta Data files (Actions, Tabbed Page Configurations, Custom Codes) are saved as individual records.
 - b. Use Data Loader to export updated Managed Tab definitions from GB Global Meta (GBLite__GB_Global_Meta__c)
 - c. Select the following columns for export:
 - i. Controlling Field
 - ii. Grid Name
 - iii. Object API Name
 - iv. Object Dot Field Name

- v. Original Record Id [used to map custom code files and actions to grids]
 - vi. Picklist Meta
 - vii. Request Status
 - viii. Response Message
 - ix. Scope
 - x. Summary
 - xi. Type
- d. Apply a filter in Data loader where the `GBLite__Type__c` column value is not *equal to* Action
- i. Sample SOQL query:
 1. `SELECT GBLite__Controlling_Field__c, GBLite__Grid_Name__c, GBLite__Object_API_Name__c, GBLite__Object_Dot_Field_Name__c, GBLite__Original_Record_Id__c, GBLite__Picklist_Meta__c, GBLite__Request_Status__c, GBLite__Response_Message__c, GBLite__Scope__c, GBLite__Summary__c, GBLite__Type__c FROM GBLite__GB_Global_Meta__c WHERE GBLite__Type__c = 'Tabbed Page'`
- e. Save this file as a CSV file with the name `GBGlobalMetaToInsert.csv`

4. Import GridBuddy Settings Definitions to Target Environment

- a. Use Data Loader to **INSERT** `GridBuddySettings` (`GBLite__GridBuddySettings__c`) using the CSV created earlier (`GridsToInsert.csv`).

5. Import GB Global Meta Definitions to Target Environment

- a. Use Data Loader to **INSERT** `GB Global Meta` (`GBLite__GB_Global_Meta__c`) using the CSV created earlier (`GBGlobalMetaToInsert.csv`).
- b. On subsequent Production deployments, only net new artifacts (custom code, tabbed page definition) should be deployed

6. Refresh GridBuddy Metadata

- a. Navigate to the Grid Wizard
- b. In the Manage Grid Meta Data, click on the “Refresh All Grid Meta Data” link

7. Assign GridBuddy Licenses to Users (Prod only)

- a. Note: This step does not exist in a Sandbox environment - only Production.
- b. GridBuddy will not be visible to users until this step is complete.
- c. *Setup > Installed Packages > GridBuddy > Manage Licenses.*

8. Future: Upgrade Steps

- a. Upgrade notification email will be sent out for new releases.
- b. To upgrade, simply install over the existing version from the AppExchange.
- c. Do not uninstall GridBuddy in this process. This will erase any configuration. Simply

install over the existing version.

- d. Release notes: <http://www.appbuddy.com/release-notes.html>

9. Future: GridBuddy Support / Granting Login Access

- a. Log support cases with support@appbuddy.com.
- b. To granting login access to AppBuddy Support for troubleshooting, follow these steps:
Setup > My Personal Information > Grant Login Access > choose AppBuddy Support > 5 days > Save.

****For Reference****

¹To grant Visualforce page access to a profile:

1. Go to Setup > Manage Users > Profiles
2. Click on the Profile name to open the Profile view screen.
3. Scroll to the bottom of the page and click the **Edit** button next to **Enabled Visualforce Page Access**.
4. In the **Available Visualforce Pages** section, select the Visualforce pages indicated above and move them to the **Enabled Visualforce Pages** section by clicking the "Add" arrow.
5. Click Save.

²To grant Visualforce page access to using permission sets:

6. Go to Setup > Manage Users > Permission Sets.
7. Click "New" and populate the Label and select the User License (most often, it's "Salesforce").
8. Click on "Visualforce Page Access" the click "Edit".
9. In the **Available Visualforce Pages** section, select the Visualforce pages indicated above and move them to the **Enabled Visualforce Pages** section by clicking the "Add" arrow.
10. Click Save.

Assign Profile or Permission Set access to GridBuddy Enabled Visualforce Page Access

- c. Modify each profile¹, OR create two permission sets² for GridBuddy Administrators and GridBuddy End Users.
- d. GridBuddy Administrators (*need access to the Grid Wizard so they can configure grids*)
 - i. GBLite.GridWizard1
 - ii. GBLite.GridWizard2
 - iii. GBLite.GridWizard3
 - iv. GBLite.ManageActions
 - v. GBLite.ManageFolders
 - vi. **GBLite.AllGrids**
 - vii. GBLite.Grid
 - viii. **GBLite.GridSave**
 - ix. GBLite.GridExport

- x. `GBLite.GridLoad`
 - xi. `GBLite.LookupAjaxResponder`
 - xii. `GBLite.ManageTabbedPages`
 - xiii. `GBLite.UserFilter`
 - xiv. `GBLite.ManageCustomCode`
 - xv. `GridAjaxResponder`
 - xvi. `GBTabs_Employee_Workspace`
 - xvii. `GBTabs_Supervisor_Grid`
- e. End Users (*need access to grids*)
- i. `GBLite.AllGrids`
 - ii. `GBLite.Grid`
 - iii. `GBLite.GridExport`
 - iv. `GBLite.GridLoad`
 - v. **`GBLite.GridSave`**
 - vi. `GBLite.LookupAjaxResponder`
 - vii. `GBLite.UserFilter`
 - viii. **`GridAjaxResponder`**
 - ix. `GBTabs_Employee_Workspace`
 - x. `GBTabs_Supervisor_Grid`

Custom code files

- [AppBuddy To Do] add JIRA Links to all the custom code files

Meta Data Deployments

- If new meta data is updated that needs to be reflected on the grid:
 - Dependent picklists
 - Record Type picklists
 - Lookup Filters
 - Lookup Layout Dialog
- Then the `GB_Global_Meta__c` records of that Type will need to be migrated from a lower environment by refreshing the meta data in said environment (Grid Wizard > Refresh All Grid Meta Data) and migrating the GB Global Meta records to Production

Post Migration checklist

1. Confirm Production grids have migrated successfully
2. Navigate to the “Configuration Supervisor Grid New” and confirm on Grid Wizard step 1 I that the correct custom code files are associated to the grid
3. Confirm Meta Data migration was successful by testing the controlling/dependent picklists on the grid: Reason, Sub-Reason
4. Validate list of artifacts on *Grid Wizard > Manage Custom Code*