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IDX Workbench Configuration for Migration

Vlocity™

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IDX Workbench Configuration for Migration

Before you can migrate components, you must specify the source, the target, and the objects to be migrated. The source can be an org, a Project object in an org, a JSON file, the Vlocity Process Library, or a Git repository. The target can be an org or a Git repository.

You can also save to a JSON file when you migrate. See Save Objects to a JSON File.

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Configure for Migration Between Orgs

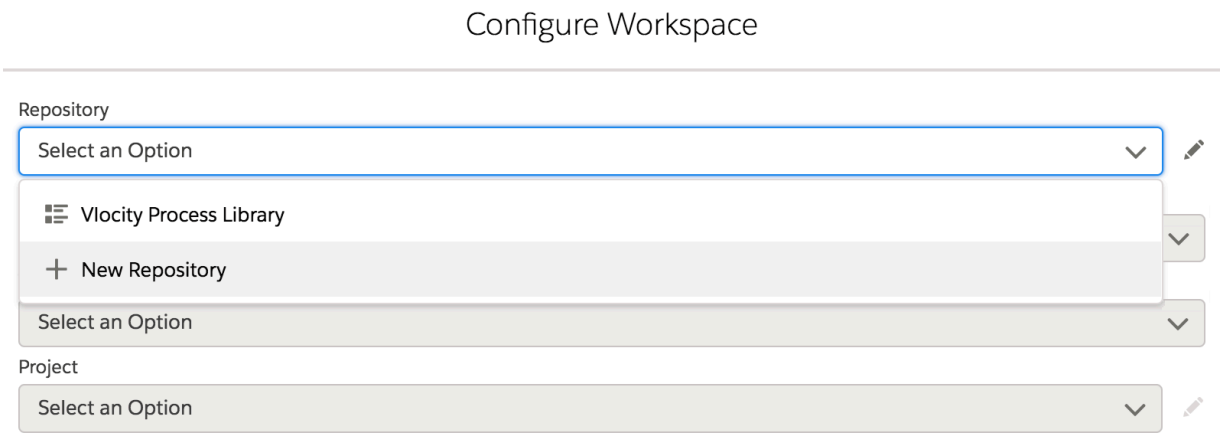
You must configure a Source org and a Target org. Both must be Vlocity orgs.

NOTE

You can import DataPacks of some older OmniStudio for Vlocity (formerly Digital Interaction Platform) objects into an OmniStudio org. DataRaptor, Integration Procedure, and LWC-enabled OmniScript objects are automatically converted to OmniStudio objects.

Importing DataPacks of OmniStudio objects into an OmniStudio for Vlocity org isn't supported. Importing Cards between OmniStudio and OmniStudio for Vlocity orgs isn't supported.

1. In the org you plan to use as your Source, make sure the correct versions of Salesforce objects you want to migrate are active.
   Some objects, such as OmniScripts and Integration Procedures, have versions that can be activated and deactivated. Only active versions of such objects are migrated.
2. Open IDX Workbench. If no projects exist, the Configure Workspace dialog appears.
   If other projects exist and you want to create a new project, click the Edit icon on the main IDX Workbench screen to open the Configure Workspace dialog.
3. From the Repository drop-down list, select **New Repository**.
   You must create a repository for the project even if both your source and target are orgs.



4. In the New Repository dialog, specify a **Name** and a **Repository Folder**. If the folder doesn't exist, it's created. Click **Save**.

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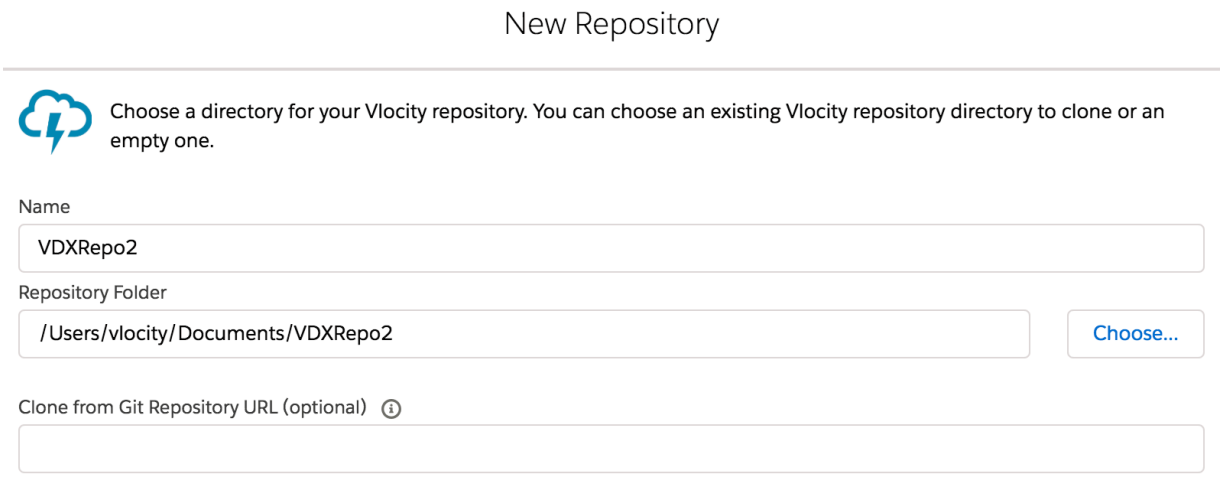
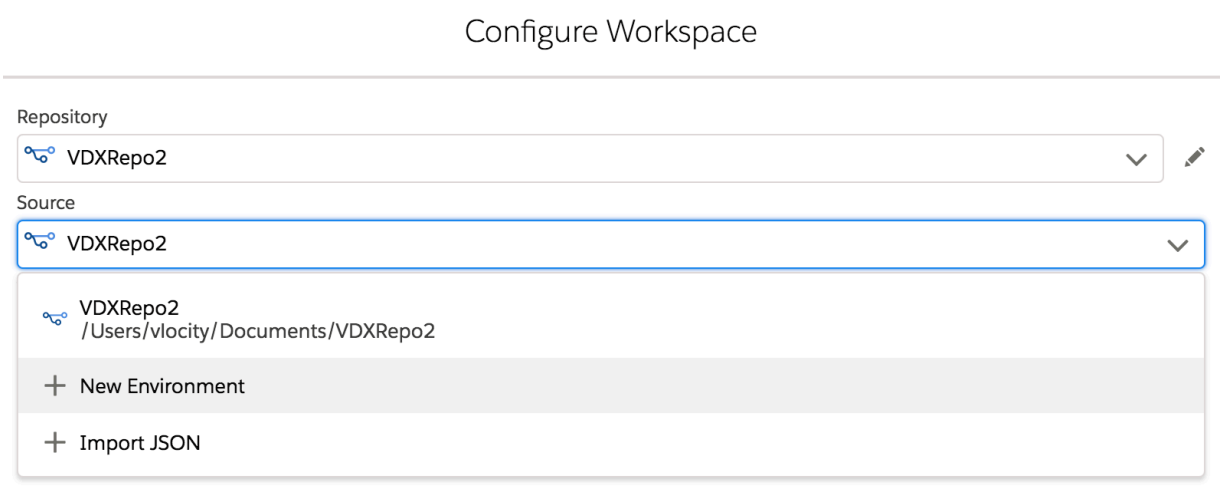


5. From the Source drop-down list, select **New Environment**. (An environment is an org.)



To configure limited access to an org, see Configure an Org Using a Community User Login.

6. In the New Salesforce Org dialog, specify a **Name**.

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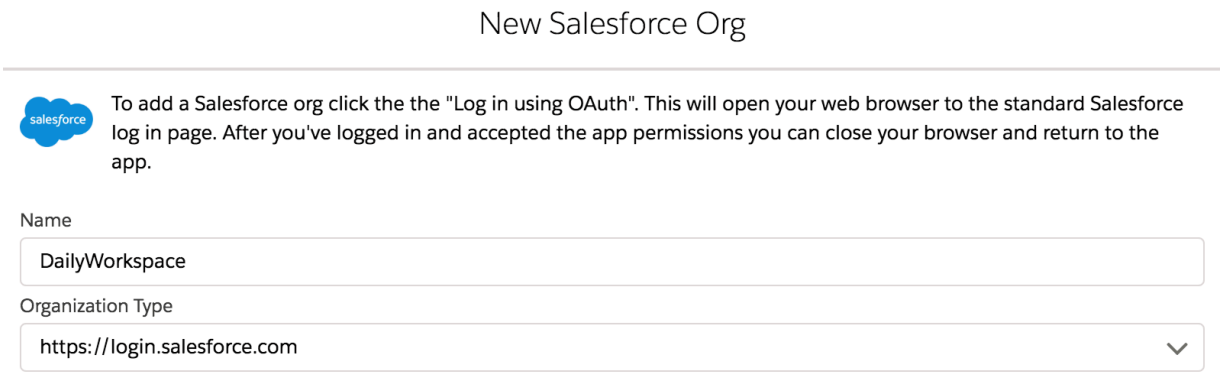
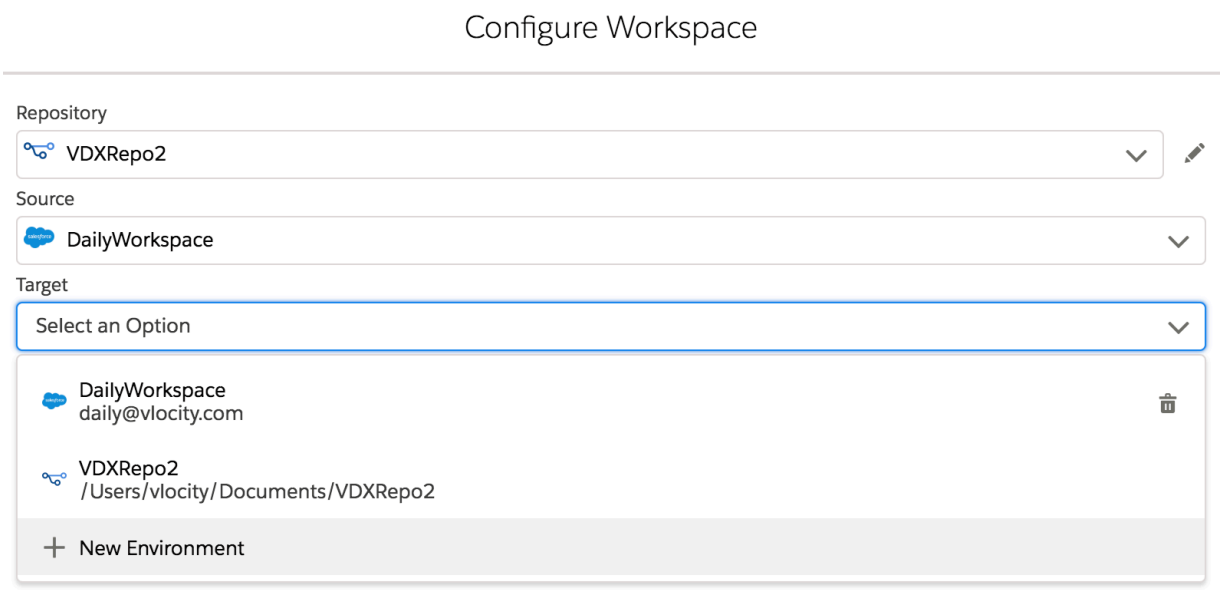


7. If your Source is a sandbox org, change the **Organization Type** to **https://test.salesforce.com**.
8. Click **Log in using OAuth**. The Salesforce login window appears. Log in to the org.
   If the Allow Access window appears, click **Allow**.
9. From the Target drop-down list, select **New Environment**.



Repeat the same steps.

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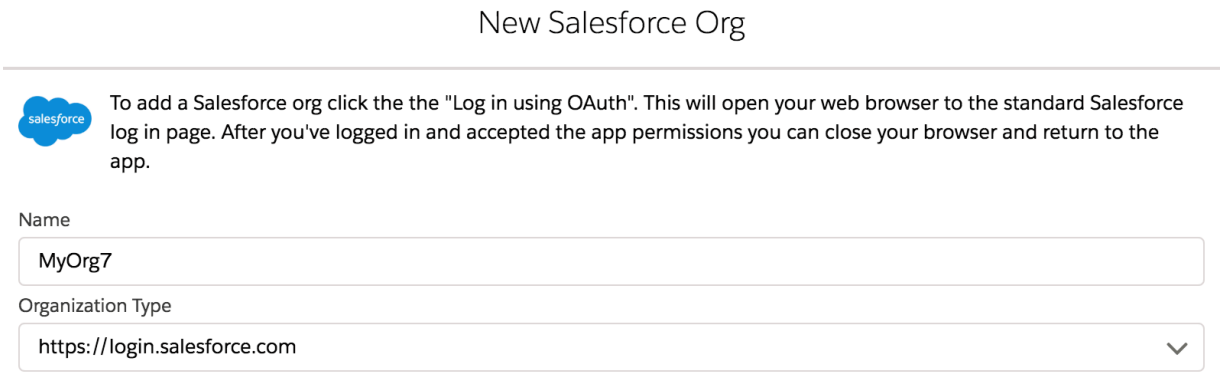
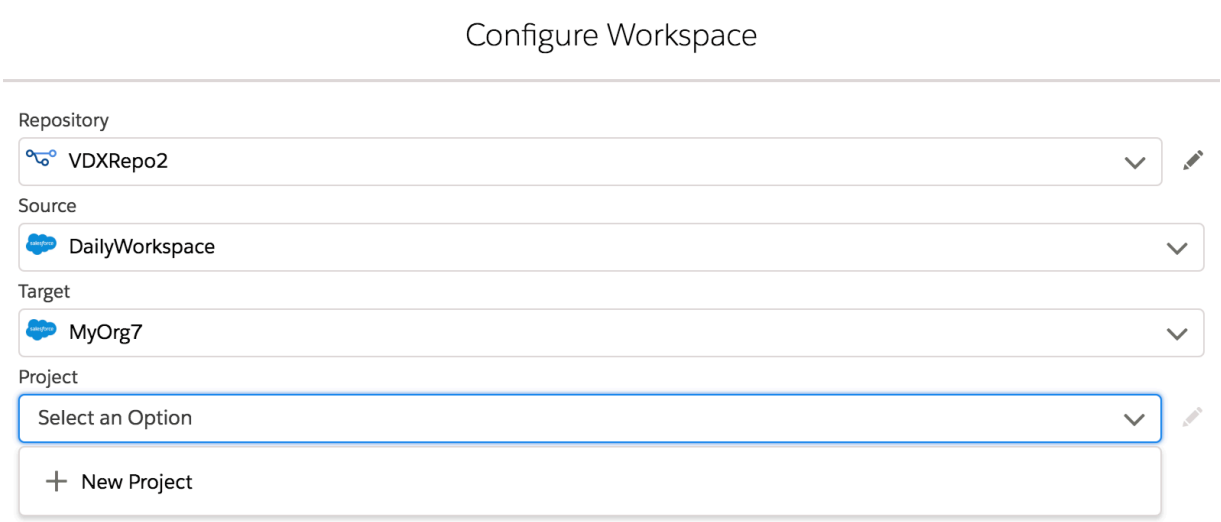


To configure limited access to an org, see Configure an Org Using a Community User Login.

10. From the Project drop-down list, select **New Project**.



To use a Project object instead of configuring a project, see the next section.

11. In the New Project dialog, specify a **Name** for your project.
12. Select the types of Vlocity and/or Salesforce objects to migrate. You can use the Search field to filter the list. Select all the types you need.

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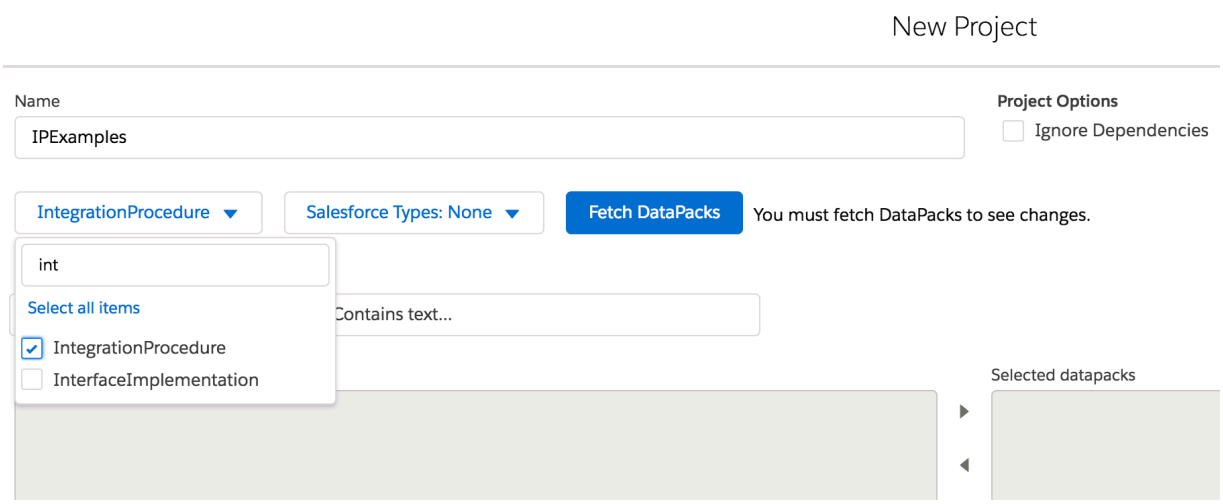
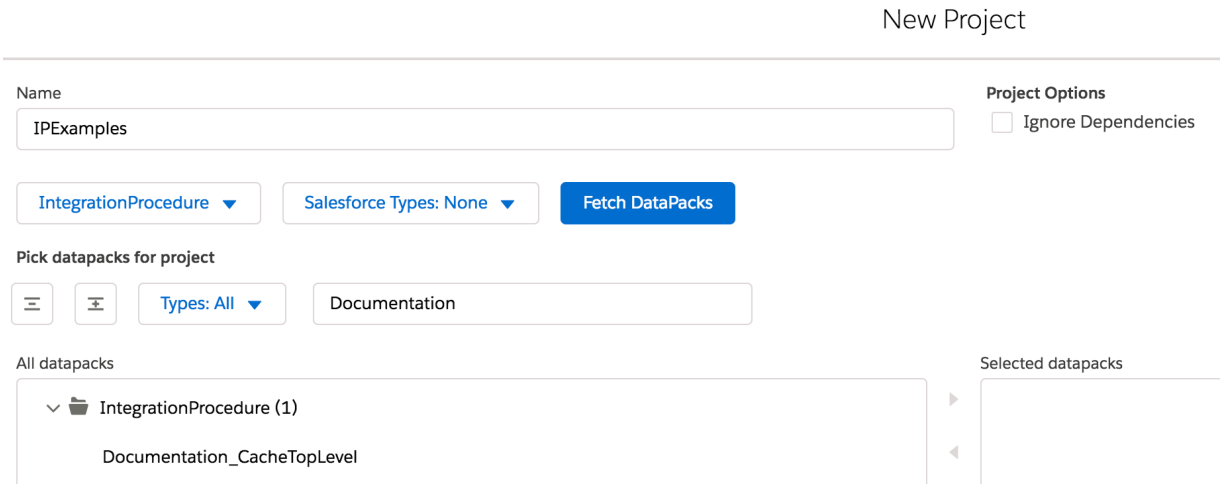


13. Click **Fetch DataPacks**.
14. Under **Pick datapacks for project**, you can optionally enter text to filter the names of the fetched objects.



15. Move the objects you want to migrate from the **All datapacks** list to the **Selected datapacks** list. You can use the Shift key to select multiple items in either list.

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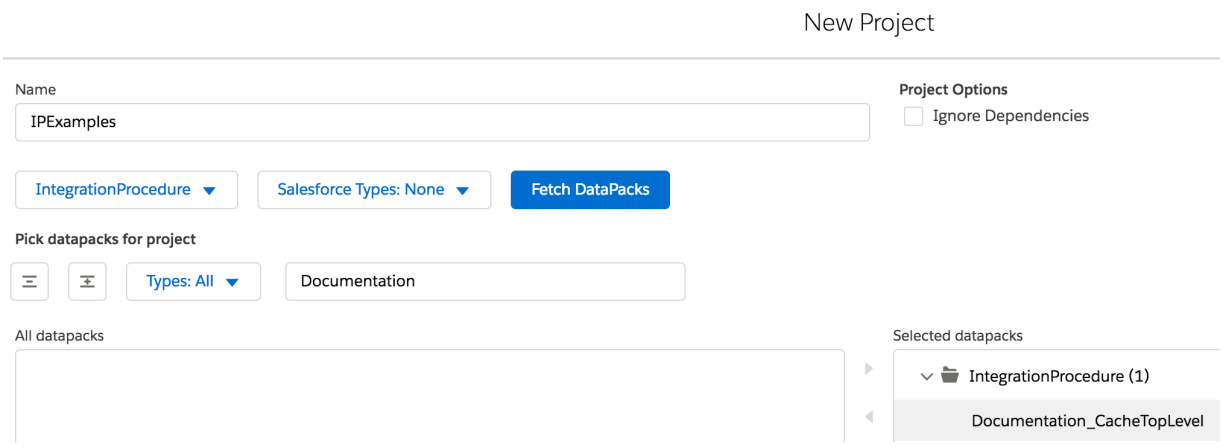
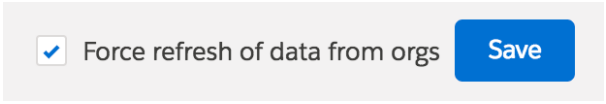
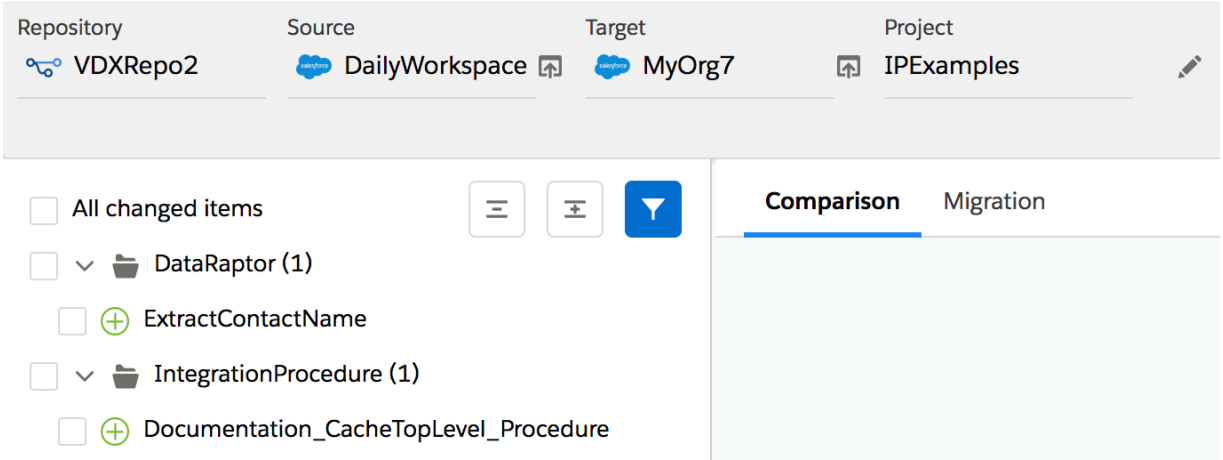


You can click **Ignore Dependencies** to exclude dependent objects from migration.

16. Click **Save**. The Configure Workspace dialog reappears.
17. To refresh comparison data whenever you save the workspace, make sure the **Force refresh of data from orgs** box is checked.



18. Click **Save** to save the workspace.
    Messages appear as objects are fetched. To cancel, press Command-R on the Mac or Control-R on other operating systems.
19. When the listing is complete, IDX Workbench looks like this:



The green + icons indicate that the objects are new in the Source org.

20. To edit the repository:
    a. Click the Edit icon on the main IDX Workbench screen to reopen the Configure Workspace dialog.
    b. Click the Edit icon next to the Repository drop-down list to open the Repository Settings.

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c. Edit the **Expansion Path** if you want to change the subfolder of the repository folder in which DataPacks are stored.
d. Specify **Additional DataPack Query Filters** if you want to filter objects of the specified type in all projects that use the repository. Click **Add New Filter** to add as many filters as you need.
   For example, setting **DataPack Type** to **Product2** and **Additional Query Filter** to `RecordTypeId != null` excludes non-Vlocity products.
e. Click **Save**.

21. To add objects to the project:
    a. Click the Edit icon on the main IDX Workbench screen to reopen the Configure Workspace dialog.
    b. Click the Edit icon next to the Project drop-down list to reopen the Project dialog.
    c. Repeat steps 12 through 18 above.

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Configure an Org Using a Community User Login

When you configure an org for running Test Procedures, you can specify a Salesforce Community and authenticate as a Community user. This is especially useful for running Test Procedures in which user access affects the results.

You must set up the Community user to have access to all Integration Procedure related objects, the Tracking Service, and the Apex class `ProcedureTestFramework`.

Before You Begin
For assistance with these tasks, see Set Up and Manage Salesforce Communities. 1. Set up a Salesforce Community. 2. Create a Community user with the required Permission Sets. 3. Know the username and password for this user.

1. In the org, go to Setup.
2. In Setup, in the Quick Find box, type **`communities`**, then select **All Communities**.
3. Copy the **URL** of the Community you want to use.
4. In IDX Workbench, select **New Environment** from the Source, Target, or Test User drop-down list.
5. Specify the **Name** of the user or another descriptive name.
6. Click the **+** to the right of the **Organization Type** field.
7. Paste the URL of the Community into the **Enter a new Login URL** field.
8. Click **Log in using OAuth**. The Salesforce login window appears. Log in to the org using the user's username and password.
   If the Allow Access window appears, click **Allow**.

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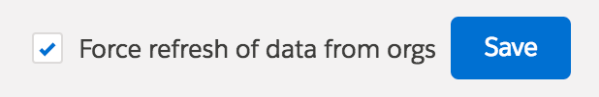
Configure a Project Object

To create a Project object, see the Vlocity Success Community Documentation.

1. Configure the Source and Target. See steps 1 through 9 of Configure for Migration Between Orgs.
2. From the Project drop-down list, select **Load Projects from Source**.
   This retrieves active Project objects in the Source org that have a Status of Released.
3. When the Project objects finish loading, select a Project object.
4. To refresh comparison data whenever you save the workspace, make sure the **Force refresh of data from orgs** box is checked.



5. Click **Save**.

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Configure for Migration from a JSON File

You can specify a DataPack as a Source and migrate to either an org or a Git repository Target. The DataPack must include all the objects you want to migrate in a single JSON file.

1. Follow the instructions for migrating between orgs. See Configure for Migration Between Orgs.
2. In step 5, select **Import JSON** from the Source drop-down list and browse for the file.

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Configure for Migration from the Salesforce Industries Process Library

You can migrate DataPacks from the Salesforce Industries Process Library to a Vlocity org.

To create a project using the Salesforce Industries Process Library as its Source:

1. Open IDX Workbench. If no projects exist, the Configure Workspace dialog appears.
   If other projects exist and you want to create a new project, click the Edit icon on the main IDX Workbench screen to open the Configure Workspace dialog.
2. Select **Vlocity Process Library** from the Repository drop-down list.
3. Click **Login with different username**.
4. Click **Continue** to open the Vlocity Process Library in a browser tab.
5. In the browser tab, log into the Vlocity Process Library using your Vlocity Success Community username and password.
6. If you see the Allow Access? window, click **Allow**.
7. After successful login, return to IDX Workbench and click the Refresh button under **Vlocity Process Listing**.
8. From the Process Listing drop-down list, select the desired listing.
9. From the Target drop-down list, select a previously configured org or **New Environment**.
   For a new org, follow steps 5 through 8 in Configure for Migration Between Orgs.
10. Click **Save**.

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Configure for Migration Between a Repository and an Org

You can use a Git repository as a Source or Target in IDX Workbench, migrating DataPacks from the repository to a Vlocity org or the reverse.

Before You Begin

Before you can set up a project with a Git repository as a Source or Target, you must:

1. Install Git on your computer. See Installing Git.
2. Set up your identity for using Git. See First-Time Git Setup.
3. Ensure that IDX Workbench has access to the Git repository.

Instructions differ depending on the type of repository and whether you use a password or SSH — see the documentation for your repository. If you use Bitbucket with password access, see Give a Bitbucket Git Repository Access to IDX Workbench.

To create a project using a Git repository as its Source or Target:

1. Follow the instructions for migrating between orgs. See Configure for Migration Between Orgs.
2. In step 4, in the New Repository dialog, paste the cloning URL into the **Clone from Git Repository URL** field.
3. In step 5, select the repository as the Source, or in step 9, select the repository as the Target.

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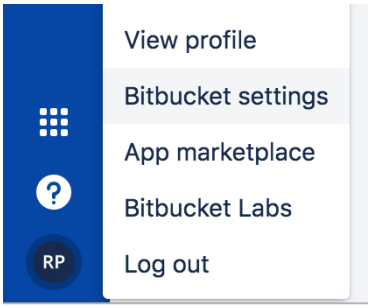
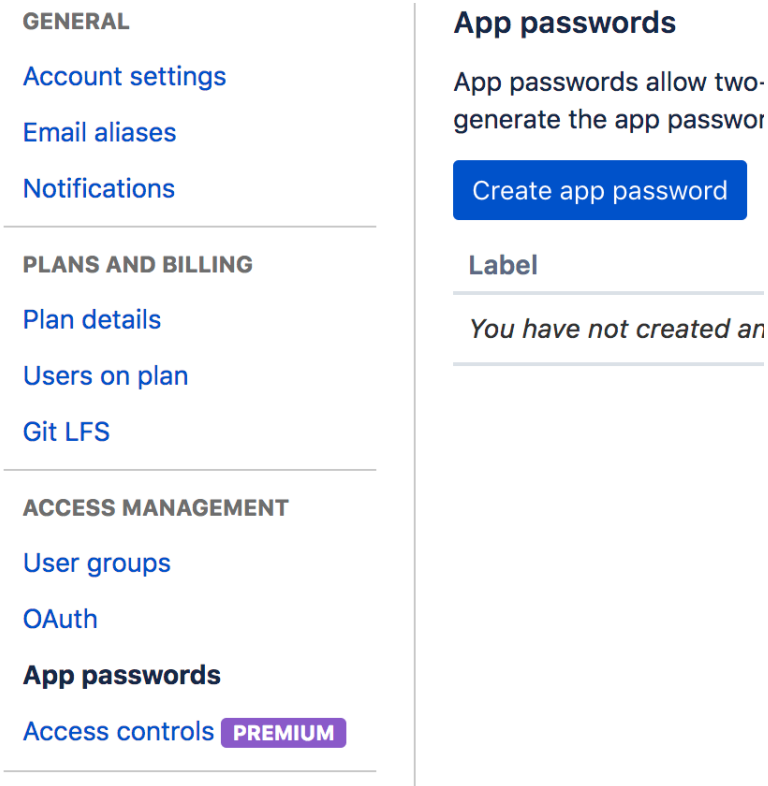
Give a Bitbucket Git Repository Access to IDX Workbench

You can give IDX Workbench access to a Bitbucket repository using a password.

1. Go to Bitbucket in your browser.
2. Click the icon with your initials and select **Bitbucket settings**.



3. Under ACCESS MANAGEMENT, click **App passwords**.



4. Click **Create app password**.

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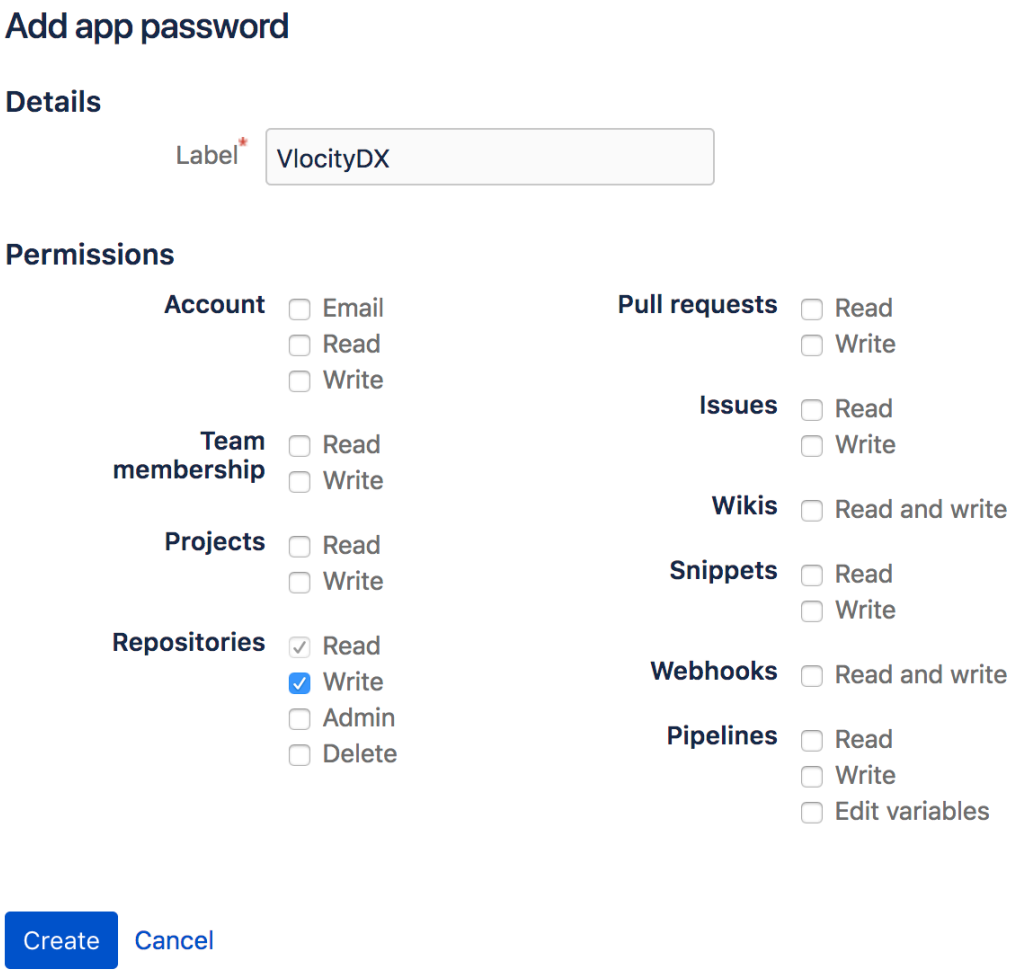
5. For the **Label**, specify **`VlocityDX`**.
6. Under Repositories, check the level of access you have to the repository.
   For example, if you have write access, check **Write**.



7. Click **Create**.
8. Copy the displayed password to a place from which you can copy it again, such as a text file.

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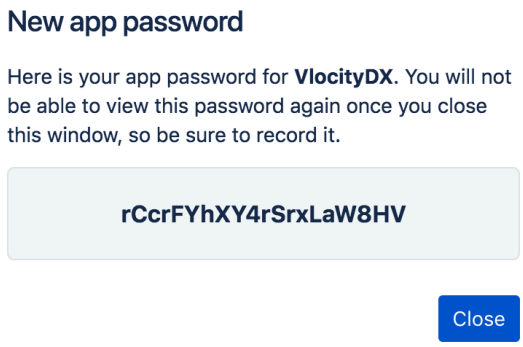

9. Go to the repository you want to use as the Source.
10. Click **Clone**.
11. In the **Clone this repository** dialog, change **SSH** to **HTTPS**.
12. Copy the URL to a place from which you can copy it again, such as a text file. It should look something like this:

    ```
    https://username@bitbucket.org/company/reponame.git
    ```
13. Edit the URL to add a colon and the password after the username. For example:

    ```
    https://username:rCcrFYhXY4rSrxLaW8HV@bitbucket.org/company/reponame.git
    ```

    This is the URL you will paste into the **Clone from Git Repository URL** field when you create the Repository used as the Source.
14. Click **Close**.

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Create Additional Projects

After you have created your first project, you can create additional projects.

1. Click the Edit icon on the main IDX Workbench screen to reopen the Configure Workspace dialog.
2. Change the Repository, Source, and Target as needed.
3. For the Project drop-down list, select New Project.
4. Configure the project.
5. In the Configure Workspace dialog, click **Save**.

See Also

- Configure for Migration Between Orgs

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Switch Between Projects

You can switch from your current project to another existing project.

1. Click the Edit icon on the main IDX Workbench screen to reopen the Configure Workspace dialog.
2. From the Repository drop-down list, select the Repository for the project. You must do this even if your project migrates between orgs and your repository is just a folder.
3. For the Project drop-down list, select the project.
4. Verify that the Source and Target are correct. Change them if necessary.

See Also

- Configure for Migration Between Orgs

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Handle a Login Failed Message

If you refresh a Source or Target org and see a `Login Failed ... Please Login Again` message, you can fix the error.

1. If the Configure Workspace dialog isn't open, click the Edit icon on the main IDX Workbench screen to open it.
2. Don't delete the Source or Target org, but select **New Environment** from the Source or Target drop-down list.
3. Follow steps 6 through 8 of the instructions for migrating between orgs above.
4. In the Configure Workspace dialog, click **Save**.

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Use a .vlocityignore File to Exclude Objects

You can specify a list of object types and/or objects to ignore in all the projects that use the same repository.

A `.vlocityignore` file follows all the rules for `.gitignore` files. For more information, see Ignoring Files.

1. Place a file named `.vlocityignore` in the top level of your repository folder.
2. Open this file in a text editor.
3. Add the names of object types and/or objects to ignore, each on a separate line.
   For example, the following file ignores all CalculationMatrix objects except the one named Matrix1:

   ```
   CalculationMatrix
   !CalculationMatrix/Matrix1
   ```
4. Save the file.

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