Configuration Transfer

Planon Software Suite

Version: L104

Planon
Building Connections

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About this Document

Intended Audience

This document is intended for *Planon Software Suite* users.

Contacting us

If you have any comments or questions regarding this document, please send them to: support@planonsoftware.com.

Document Conventions

Bold
Names of menus, options, tabs, fields and buttons are displayed in bold type.

Italic text
Application names are displayed in italics.

CAPITALS
Names of keys are displayed in upper case.

Special symbols

	Text preceded by this symbol references additional information or a tip.
	Text preceded by this symbol is intended to alert users about consequences if they carry out a particular action in Planon.

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About Configuration Transfer

Transferring the configuration of a Planon ProCenter environment can be done, typically, by exporting/importing the configuration components from one environment (Test) to another (Production). The primary aim of this feature is to facilitate an easy, quick and smooth implementation of all the configuration components ranging from navigation items, TSIs, layouts, BOs & fields, filters, forms and reports.

The Configuration Transfer import will not remove items from a Production environment in the Loose mode. For example, if a layout, a pick list or a record within a pick list is present in the Production and not in Test, when the package is imported (in the Loose mode) from Test to Production, it will not be removed from the Production environment.

However, when you import in the strict mode, the package (source environment) rules and all pick list items that are present in the target environment but are no longer present in the package will be removed. Similarly, TSI levels/steps may be removed if they are not present in the TSI of the package.

Planon ProCenter also offers, through the **Enterprise Talk** TSI, the possibility to import DATA from another application or data source into Planon ProCenter and to export data from Planon ProCenter to an xml/csv file. Using **Enterprise Talk**, you can maintain the Planon ProCenter data structure and import the configured set up from a test environment to a production environment.

For more information, refer to *Enterprise Talk*.

Planon provides Configuration Transfer as a web based solution through its Web Client. A dedicated TSI called **Configuration Transfer** enables the **Export**, **Import** and **Preview** of a configuration via a wizard.

Following is the list of configuration components in Planon ProCenter that are included/ not included in the export/import:

Configuration components included in export/import	**Configuration components NOT included in export/import**
navigation groups	Files of template forms
TSIs	Files of user extensions
Layouts	Files of extended actions
Business objects *	Standard orders 1
Display types	Data such as trades, order groups etc.
Picklists	
Selection step filters	
User filters	

Configuration components included in export/import	Configuration components NOT included in export/import
Customizable lists	
Aler definitions	
Alert conditions	
Forms	
Reports	
Authorization filters	
Authorization links	
ProCenter filters	
System Settings	
Web Services	

Notes

- 1: Must be done using Enterprise Talk.

Business object settings

***** The business object settings of the following BOs are exported:

- BaseMaintenanceActivityDefinition
- ParkingArea
- BaseContract
- FinancialYear
- KnowledgeBaseItem
- BaseOrder
- MeasurementPointSummarizedReading
- BaseBudgetCategory
- CompactGaugeReading
- Invoice
- KeyDefinition
- LockDefinition
- BaseMeterReading
- SessionData
- BaseSLASearchPriority
- Space
- SSPDemand

Following is the list of configuration components in Planon ProCenter that are not included in the export/import:

- Files, such as: Template form files, User extension files, Extended actions files, Web service definition files and more.
- Standard orders *
- Data like Trades, Order groups and more *

* Must be done using Enterprise Talk.

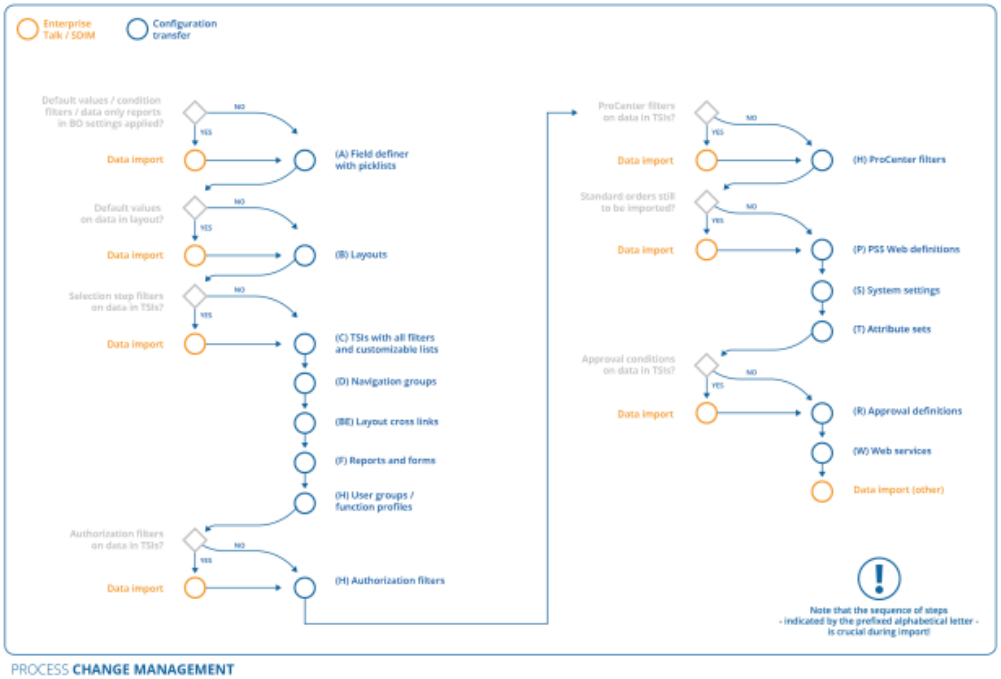
Process

When transferring configuration to another environment by using Configuration Transfer, it is likely that you run into and need to resolve dependencies.

The following overview lists the steps in the process of transferring configuration. From this overview it is apparerent that specific data needs to be imported first in order to be able to use Configuration Transfer successfully.

In order to transfer data as well as configuration, the following tools come into play:

- Enterprise Talk
- Data onboarding / SDI
- Configuration Transfer



You can automatically remove completed records by creating an action definition in the Alerts TSI on Configuration transfer- and Configuration label definitions. After creating a meaningful filter, for example on the status of the BO definition, the completed records can automatically (scheduled) be deleted.

Configuration transfer - Concepts

This section describes the concepts available in **Configuration transfer** and how they interact with each other.

See the links below for more information:

- Configuration job
- Package
- Strict export mode
- Loose export mode
- Loose import mode
- Strict import mode
- Differences between the two modes of configuration transfer
- Preview mode

Configuration job

When you perform an export/import/preview, a corresponding job is created together with its details.

The configuration job registers actions carried out during export/import/preview of a configuration.
Every Configuration job in the element list displays an icon that indicates the job that you performed.

For example, indicates an export job, indicates a preview job and indicates an import job.
On a registered Configuration job, you can view the information such as **Start/end date-time**, **Job type**, Package > name, **Status**, **Inserted by** and so on. You can search for a job using the search bar. You can also generate a user report for a Configuration job.

Configuration job > details

The Configuration job > details provides information about what components are exported/imported/previewed and the progress of a job. You can also cleanup/delete the configuration transfer jobs when you no longer need them.

Package

A single zip file containing the exported configuration components for an easy transfer from one environment to the other.

During the export, a configuration package (a zip) file is created on the Planon application server which can be downloaded later on your local file system.

During the export you can define a name for the package file. The comments you enter at the time of export are registered in the zip file. Every new package (as it is a secure document) is set in it's own folder on the designated file location and the existing packages with the same name are NOT overwritten.

Strict export mode

Exports an entire hierarchical business object (BO) along with its subs.
In this mode, the complete sets of configurable business objects on the highest level (base, system and user-defined) including all their available display types are selected. For example, Base Order BO.

This mode is generally used to export a configuration to a production environment.

Loose export mode

Exports the configurable BOs at the lowest level and can be used to export individual user defined BOs.
Loose export is very handy in exporting a specific process involving user-defined business objects.
The Loose mode is generally used to export a configuration to a development environment.

Loose import mode

An import used for an initial import into the Development environment which can be modified later, if required.
Loose import allows the import even when there are certain errors. For example, during the import, a TSI will be imported successfully, even if a configuration component such as a Step filter is missing.
Loose import can be used in a development environment which can be adapted at a later moment for implementation.

Strict import mode

Imports just everything that is in the exported package so that the configuration in the target environment will be exactly as in the package. Strict import is useful when you want to export the exact set of the configuration from the source to replace in the target environment. In contrast with the Loose import, if a single configuration component is missing, the import will not be carried out.
For instance, if a filter criterion of a TSI step cannot be imported, then in strict mode the entire filter is not imported. As a result, the involved TSI is not imported either. However, other filters/TSIs without problems will be imported though.

In the Loose mode, the filter is imported without the failing criterion and the TSI is imported as well.

A Strict import (entire hierarchical BO) of a Loose export (only userdefined BO (s)) cannot be done as this can corrupt the target configuration inadvertently.

In Strict mode, configuration components like UDBOs, pick list items are deleted from the target environment in case they are no longer present in the package.

Differences between the two modes of configuration transfer

Planon ProCenter supports two modes of configuration transfer:

- Strict export/import mode
- Loose export/import mode
- Differences between the two modes:

Strict export/import mode	Loose export/import mode
Useful for export/import into production environment	Useful for export/import into test/ development environment
Export/import done with restrictions.	Export/import done with fewer restrictions.
Enables 100% matching packages to be imported to production.	Enables importing a not 100% matching package into a develop/ test environment.
Any import error will result in stopping the import of the configuration component (other components will be imported).	In case of an error, the loose import will try to import the component whenever possible However, sometimes even in the Loose mode an error can result in no import. For example, when one filter criterion fails, you can still import a filter, but when all criteria fail, the filter cannot be imported as it is not allowed to have a filter without criteria.
Configurable hierarchical BOs are imported including all lower system BOs and user defined BOs. For example, entire Base Order is imported.	Only configurable BOs at the lowest level are imported. For example, the usrWorkorders.

Strict export/import mode	Loose export/import mode
All display types related to the selected (base) BO are exported.	Only those that have been explicitly selected by the user are exported.
The entire BO-tree is replaced by that in the imported package. Any user-defined BOs that are present in the target environment, but are not present in the package are removed.	The UDBOs are added to the existing environment.
WorkFlow diagram position data that exists in the target environment but not in the import file, will be removed from the target environment.	WorkFlow diagram position data that exists in the target environment but not in the import file, will be left as it is in the target environment.

Preview mode

Previewing allows you to test the import of a configuration without actually importing the configuration. So, in the Preview mode no changes to the database are made.

Exporting configuration

Prerequisite

- Enter a valid path for the server upload location (file location for secure documents).

> For more information, see Specifying secure file locations (System Settings).

- Ensure that no BO to be exported is set to **Under construction**. Even if a BO is not exported, it should not be under construction.

Procedure

1. Go to **Jobs**.
   This level has two steps:
   - Transfer jobs: here you find all 'regular' Configuration Transfer jobs.
   - Labels: here you find jobs that are specific to Configuration labels.
2. Select the appropriate step and click **Export configuration** on the action panel.

   The **Configuration export** wizard appears.
   Perform the following mandatory steps in the wizard:
   - Specify the package
   - Specify the export mode
3. Fill out and complete the optional steps. You can skip these steps by clicking the **To Summary** button next to the **Next** button to jump to the final summary.
4. Confirm the export.

Specify package

1. On this screen, you can:
   - create/define a new package for export.
   (or)
   - load and modify an existing package for export.
   - If you select **Create new package**, specify a name for the package in the **Package name** field. The package name will be displayed on all the subsequent screens of the wizard.

- If you select **Load existing package**, click the file upload button to select the package file that you want to export

2. Enter comments, if any, in the Comments field.

If you select **Load existing package**, then all the current configuration components **In use**, if any, will be removed and will be prefilled with the various configuration components as present in the package.

The **Package name**, **Comment** and **Export mode** are set as defined in the selected package.

3. Click Next.

Specify export mode

Procedure

1. On this screen, select an export mode.
   - Select Loose, to export the configurable BOs on the lowest level (of the hierarchical BO, e.g. the user-defined, configurable BOs.)
   - Select Strict, to export the configurable BOs on the highest level (of the hierarchical BO).

   For more information, refer to Loose export mode & Strict export mode.

2. Select Allow remapping of free business objects:
   - Select **Yes**, to remap free user-defined BO fields during import into alternative free user-defined BO fields of the same Free BO.
   - Select **No**, to import free user-defined BOs into the same free user-defined BO of the same Free BO. Remapping of free UDBOs to alternative free UDBOs of the same Free BO is not allowed.

Remapping of free UDBOs to alternative free UDBOs of the same Free BO is allowed only in Loose export mode.

3. Click Next.

Select the navigation groups

Procedure

1. On this screen, the navigation groups that are present are all listed. Select the navigation groups in the Available list and move them to the Selected list.

In this step, note that an entire group is exported and it is not possible to export individual group parts.

The following filter options can be used alike across the wizard:

2. Click All to select all navigation groups in the list at once. Click None to deselect.

   You can also use the quick search bar, to quickly find a specific navigation groups for export.

3. Click Next.

Select the TSIs

Procedure

1. In this screen, the TSIs of the selected navigation groups (in the previous screen) are automatically set to In use. If you do not want to export a specific TSI, move it back to the Available list.

   You can also select TSIs that are NOT part of the previously selected navigation groups by selecting the “All” filter option.

The general behavior is that when you go to the next step, the components are automatically preselected based upon the selection in the previous step. When you go back to a previous step and return to the next step, you have to add/remove the components manually.

When you export a TSI, all the TSI specific layouts of the TSI are exported as well.

2. Click Next.

Select the reusable layouts

Procedure

1. In this screen, all the generic TSI layouts, linked to the TSIs selected in the previous screen are automatically pre-selected.
2. Click Next.

Select the business objects

Procedure

1. In this screen, all the involved configurable BOs of the selected layouts/ TSIs in the previous screen are pre-selected for the export.

The availability of the BOs to be exported depends on the selected export policy in the Define export policy screen.

- If you select **Strict export** policy, only the configurable BOs on the highest level are displayed. BOs on all the underlying levels are not displayed but will be exported along.
- If you select **Loose export** policy, only the configurable BOs on the lowest level are displayed.

For each business object that is exported, the following data is also exported:

- Condition filters:
  - **Strict export**: all condition filters
  - **Loose export**: only those condition filters that are linked to either the "Readonly if", "Mandatory if" or "Invisible if" of any field in the business object.
- System name (for unique field identification)
- Field properties that can be configured by the user
- Actions
- Status transitions
- All pick lists that are used/referred to in the BO
- User links
- Solution extensions
- Extended actions
- Workflow diagram position data
- Translated field names in all defined languages

However, during the import, only the translations of the fields that are set to **In use** are carried out. This is done to prevent unintended overwriting of the existing translations.

2. If you want to export the business object settings, select the Include settings check box at the bottom of the screen to include these in the package. This is only available in strict mode.
   - If **Knowledge base item settings** are exported and the **Copy to** fields are set, BO Order is selected in this step.
   - If **Invoice settings** are exported and the **Communication log** field is set, the Communication log BO is selected in this step.
   - When **Order settings** are exported and activity **Bar texts** are set, the corresponding data only reports are automatically selected in the **Reports** step.
3. Click Next.

Select the attribute sets

1. In this screen you can select the attribute sets to be exported.
2. Click Next.

Select the picklists

1. In this screen the picklists that they were either selected for a (free) field or for a user link (multiple select free field) of the BOs selected in the previous screen are automatically pre-selected. You can also select the picklists that are not part of previously selected BOs by selecting “All” filter option.
2. Click Next.

Select the display types

This screen is available ONLY in the **Loose** export mode.
In the **Strict** mode, this screen is skipped, as all display types of the selected BOs are exported automatically.

In this screen you can select only those display types that have been changed. Note that, the display types are not set to **In use** automatically, you must move them manually.

For every display type that is exported, the following data will be present in the package:

- System name
- Code
- Translated name in every defined language

Select the selection step filters

This screen enables you to export selected (step) filters in one go, so that you don't have to define these filters manually in the target environment.

For every TSI step filter that is exported, the following data will be registered in the package

- System name
- Business object (system name)
- Filter criteria

Select the user filters

This screen enables you to export user (group) filters in one go.

For every TSI user (group) filters that is exported, the following data will be registered in the package:

- Code
- Business object (system name)
- Filter criteria
- Translated name in EVERY defined language

If a reference field is present in the filter criteria, the unique identification of the reference BO can be found which could be the field or set of fields that uniquely identifies the BO. If the reference field is not present, the system checks if a field was made user unique. If the unique identifier was still not found, then the look-up value is used.

Select the customizable lists

This screen enables you to export the customizable lists into a package.

The following data is exported into the package for every customizable list (UDBO list) that is exported:

- Description
- Applicable BO
- Selected fields
- Display value

If the customizable list contains a (free) field that is no longer in use or whose field type has been changed, an error message is added to the comments of the **Job Details** and the export of the customizable list is NOT carried out. However, the export continues with the next customizable list.

Select alert definitions

This screen enables you to export all kinds of alert definitions into a package.

For each alert definition that is exported, the following data is included in the package:

- Code
- Name
- Alert condition
- Communication log

- Action
- Check at login
- Icon
- Log successful alerts
- Log to communication log
- Mail template
- Priority
- Recipient report
- Run account
- Schedule
- Sender email address
- Start date time
- System type
- TSI selection step
- Use reference date
- Links to account
- Links to user groups

Select alert conditions

This screen enables you to export alert conditions into a package. If you selected alert definitions in the previous step, the corresponding alert conditions will automatically be pre-selected in this step. You can of course deselect them if it is not required to transfer them.

For each alert condition that is exported, the following data is included in the package :

- Code
- Name
- Business object
- Filter

Select the forms

This screen enables you to export forms in one go from one environment to another. Forms can only be defined for orders. If the **Base order** BO is selected, in the **Strict mode**, all forms that are present in the source environment are set in use.

In the **Loose mode**, only those forms are shown that are linked to the status transition (State-TO) as present on the selected (UD)BOs.

For every form (BO ticket usage) that is selected to be exported, the following data is exported into the package:

- Code
- Name
- Addressee
- Add Ticket Name To Email Subject
- Copy To Persons
- Email subject report
- Order State
- Save file copy
- Forms (involved user report (identified by its name and BO)
- Free fields

Select the reports

This screen enables you to export reports in one go into a single package, so that you can easily transfer a report from one environment to another.

On selecting a BO for an export, all involved reports are automatically set to in use. These pre-filled reports originate from the highest level parent BO of the selected BOs.

Reports used in the selected alert definitions are also automatically set to use.

For each report selected to be exported, the general report data such as BO, title, fields, expressions, report settings are exported.

Select the user groups

This screen enables you to export the user groups in one go into a single package.

By using a boolean field you can indicate whether to include the links to product definitions and solution licenses. If you include the link to solution licenses, make sure the same license is loaded in the target environment so that you will have sufficient licenses to make the solution license connection.

On exporting a navigation group and also exporting user groups, the link to the navigation group is exported, so that this link does not need to be created in the target environment.

On selecting an alert definition for an export, all involved user groups are automatically set to use.

On exporting, the following user group data will be included in the package:

- System name
- Description, comment, Ignore max.no. of BOs and logging entry fields
- Reference to the function profile
- Links to product definition
- Links to solution license
- Each navigation group to which it is linked
- Each related action filter

Select the task user extensions

This screen enables you to export task user extensions in one go.

Procedure

1. Use the available filter options to pinpoint the task user extensions to be exported.

You can only filter on Class name Code or System status.

2. Move the task user extensions to Selected in order to export them.
3. Click **Next** to continue.

Select the function profiles

This screen enables you to export the function profiles in one go. On the **Select the function profiles to be exported** screen, all function profiles linked to the user groups that have been selected on the **Define user groups** page are set to **In use**.

On exporting, the following function profile data will be exported into the package:

- System name
- Description
- Permission type

Each linked BO Right including their **BO Right details**, is also exported.

Select the authorization filter

This screen enables you to export the authorization filters in one go.

In the **Select the authorization filters to be exported** screen, you can select:

- **All**: exports all available authorization filters.

- **Linked to the selected User groups authorization filters**: exports the authorization filters linked to the user groups that have been selected in the **User groups** step.

> If you select this option, it also includes the authorization action filters for the user group - authorization filter combination.

- **Include linked action filters**: if you select this option -
  - Your export will include linked action filters available for the authorization filters you selected.
  - Only add the *link* to the user groups used by the authorization action filters, if they have not been selected earlier on the **User groups** step.
  - For authorization filters for which no user group was selected earlier, the user groups are expected to be already present in the target system.

On exporting, the following authorization filter data will be exported into the package:

- System name
- Business object (system name)
- Filter criteria

The authorization filters are exported similar to exporting TSI user/step filters. In case the filter contains reference fields, the unique information that identifies the reference is exported.

Select the authorization links

This screen enables you to export the authorization links in one go. On the **Select the authorization links to be exported** screen, all authorization links that are defined for the (base BO) of the BOs that have been selected on the **Define business objects** page are set to **In use**.

On exporting, the following authorization links data will be exported into the package:

- System name
- Business object (system name)
- Field definition
- IsActive

> As authorization links can only be defined for Base BOs, in **Loose** export mode, the authorization links that are defined for the base BO of the selected BOs on the **Define business objects** page are considered.

Select the ProCenter filters

This screen enables you to export the ProCenter filters in one go.

1. Using the available filter options, you can pinpoint the filters you want to export.
2. Subsequently, you can indicate whether you want to list All filters, or only those Linked to selected user groups.

   The filters are displayed in the Available list.
3. Move them to selected and click Next to continue.

Select the PSS web definitions

This screen enables you to export the PSS web definitions in one go.

1. Using the available filter options, you can pinpoint the web definitions you want to export.
2. Subsequently, you can indicate which web definitions you want to list:
   - All
   - Linked to selected BOs
   - Linked to selected navigation panels
   - Linked to selected user groups

   The web definitions are displayed in the Available list.
3. Move them to Selected and click Next to continue.

You can also export the configuration of the Planon Live app in this screen.

For PSS web definitions that already exist in the target and source systems, make sure that the code of the web definition is not changed. The code is used as identifier for web definitions during the import. Changing the code will either result in new web definition or in an error, but will not update the existing web definition.

Select external data storage

This screen enables you to export all the external data storage credentials in one go.

1. The data storage credentials are displayed in the Available list.

Using the filter option, you can select the credentials you want to export.

2. Move them to Selected in order to export them.
3. Click Next to continue.

Select the System Settings

This screen enables you to export System Settings in one go.

On exporting, the following data will be exported into the package:

- Alert settings
- CAD Integrator threshold values
- CI/Asset viewer settings
- General
- Security
- Performance monitoring
- PMFS settings
- WebDAV settings
- Approved messages
- File locations
- Authorization settings
- Email settings
- Exchange settings
- Web application

- In general, single elements are exported except for Approved messages. When exporting Approved messages, all messages are exported.
- File locations and WebDAV settings cannot be exported when using a Cloud environment

Procedure

1. Use the available filter options to pinpoint the system settings to be exported.
2. Move the system settings to Selected in order to export them.
3. Click **Next** to continue.

Select the system images

This screen enables you to export system images in one go.

In the process, the system images are exported as WebDAV file references.

Procedure

1. Use the available filter options to pinpoint the system images to be exported.

You can only filter on Name.

2. Move the system images to Selected in order to export them.

3. Click **Next** to continue.

Select the approval definitions

This screen enables you to export approval definitions in one go.

Procedure

1. Use the available filter options to pinpoint the approval definitions to be exported.

You can filter on Name Code, Remarks System status and Time window for approval.

2. Move the approval definition(s) to Selected in order to export them.
3. Click **Next** to continue.

Select the approval conditions

This screen enables you to export approval conditions in one go.

Procedure

1. Use the available filter options to pinpoint the decision models to be exported.

You can filter on Business object definition Code, Name.

2. Move the decision model(s) to Selected in order to export them.
3. Click **Next** to continue.

Select the decision models

This screen enables you to export decision models in one go.

Procedure

1. Use the available filter options to pinpoint the decision models to be exported.

You can filter on Name Code, Remarks and decision model Statuses.

2. Move the decision model(s) to Selected in order to export them.
3. Click **Next** to continue.

For each decision model that is exported a validation of its decision rules (attribute sets and condition rules) will be carried out. If either of these fail, the whole model will not be exported (same for *Strict* and *Loose* export mode).

The exported data contains:

- All fields
- Linked decision rules (fields, attribute definition sets and all attributes)

Select the app settings

This screen enables you to export the available app settings in one go.

Procedure

1. Use the available filter options to pinpoint the app (settings) you want to export.
2. Move the app (settings) to Selected in order to export them.
3. Click **Next** to continue.

The package will include:

- App (UUID & App name & PartnerID)
- Module (name of the module)
- Settings class name
- Settings field
- All linked user groups
  - App (UUID & App name)
  - User group system name (uniquely identifies the user group)

The package will not include the *App account* nor the *Log level settings*because these will usually be different in the source and target.

Import

When importing a package, keep in mind the following:

- If the user group is not present in the target environment, and an error (Strict) or warning (Loose) is logged.
- If the app-user group link is present in the target environment, but not in the package, a warning (Loose) is logged or the link is removed from the target (Strict).

Additional validation is available that will result in warnings or errors when triggered.

Select the CAD drawing definitions to be exported

This screen enables you to export CAD drawing definitions.

Procedure

1. Under **Available**, select the CAD drawing definition(s) you want to export.

If necessary, use the filter options to find the required CAD drawing definitions.

2. Click the arrow to move the selected CAD drawing definition(s) to **Selected**.

Or click All to move all CAD drawing definitions to Selected.

3. Click **Next** to continue.

Please note that importing CAD-related business objects has specific Limitations.

Select the CAD import definitions to be exported

This screen enables you to export CAD import definitions.

Procedure

The CAD import definitions that are **Linked to selected CAD drawing definitions** are selected by default, but you can opt to include **All** CAD import definitions.

1. Under **Available**, select the CAD import definition(s) you want to export.

If necessary, use the filter options to find the required CAD import definitions.

2. Click the arrow to move the selected CAD import definition(s) to **Selected**.

Or click All to move all CAD import definitions to Selected.

3. Click **Next** to continue.

Please note that importing CAD-related business objects has specific Limitations.

Select the Mappings between drawing & floor to be exported

Procedure

1. Under **Available**, select the Mappings between drawing & floor you want to export.

If necessary, use the filter options to find the required mapping.

2. Click the arrow to move the selected mappings to **Selected**.

Or click All to move all mappings to Selected.

3. Click **Next** to continue.

Please note that importing CAD-related business objects has specific Limitations.

Reference fields

For reference fields, the following rules apply:

- If the `FloorCodeRef` field references an `ETAGECODE` picklist item that isn't available in the target system, a warning will be generated and the mapping will be *skipped*.
- If the `PropertyRef` field references a property that isn't available in the target system, a warning will be generated and the mapping will not be *skipped*.

Select the web services

This screen enables you to export web services in one go.

Procedure

1. Use the available filter options to pinpoint the web services you want to export.
2. Move the web services to Selected in order to export them.
3. Click **Next** to continue.

Confirm the export

This screen displays a summary of the configuration components to be exported.

- Click **Complete**. The configuration export is finished and the following updates are recorded:
  - A configuration transfer job is created.

> You are notified that the job is run as a background action. For more information about background actions, see Supporting data .

    The information on the (success of) the export of the individual components can be found on the **Job details** level.
  - Any errors/warnings that may occur during an export are listed in the **Comments** section of the related configuration job detail step.
  - After the export is completed, the **Package** field is updated with the location of the package (zip file) on the application server.

    Download the zip file to your local file system, by clicking on the download button. The copied file will have the same name as the package on the server (<packagename>.zip).
  - The status of the Configuration transfer job is set to **Finished**.

Previewing configuration import

Previewing configuration import is nothing but simulating an import from a single package file containing the configuration components (exported earlier) so as to check the import results. However, the preview of import configuration is done without changing the configuration in the target environment and without blocking production.

Preview configuration is primarily useful to see if an import will be successful and to correct any mistakes, in the selected configuration components before executing the actual import.

As previewing is only a simulation and does not affect the target configuration, you can do it during the office hours.

The preview output is the same as a regular import and is registered on the **Jobs** level. The **Job details** displays all the components included in the preview.

Previewing configuration import

To simulate the import of a configuration without actually making any changes to the target environment.

Procedure

1. Go to Jobs.
2. Click Preview configuration on the action menu.

   The **Configuration preview wizard** appears.

   Perform the steps in each wizard screen.

   - Select package
   - Define preview mode
   - Confirm preview

Preview of selected package

Procedure

1. On this screen, select a package file (for uploading) that you want to preview.
2. Click the upload button and browse for the zip (package) file you want to preview.
3. Click OK. The file name and the package name are displayed in the corresponding fields.
4. Click Next.

Define preview mode

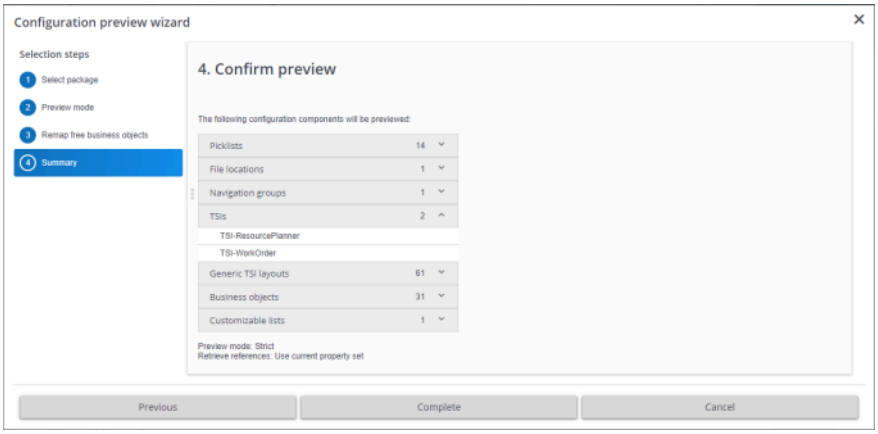
1. On this screen, select a preview mode - you can select **Loose**/**Strict** depending on your choice of import.

Note that you cannot do a strict import from a package that is created in a loose export.

2. Select the method of retrieving references for the property set. You can select from:
   - Use property set from package – This mode is used in a multi-property set environment whereby the package contains data (filters, default values) that refer to business objects in different data sections. On importing the configuration, the system will retrieve the reference in the same data section as present in the package.
   - Use current property set – This mode is used for importing a configuration into a single (current) property set. On importing the configuration, the system will only retrieve the reference within the current property set. In case of an import from a different property set, these references need to be imported earlier in order to be retrieved.
3. Click **Next**.

Confirm preview

1. This screen displays an overview of the various components whose import is to be simulated. You can expand the list to view the package details.



2. Click **Complete**. A **Configuration Transfer Job** is registered on the **Jobs** level with the job type as Preview.
   Any errors/warnings that may occur during a preview are listed in the Comments section of the related Configuration job detail step.

Note that although this is a preview, the details will state 'import' in their name as they actually describe the results of an import excepting that the import is not actually carried out in the database.

Importing configuration

Importing checks and validations

Planon ProCenter prevents any incompatible configuration transfers through several checks and validations.
On detecting errors, the Configuration transfer > job details > **Comments** section is updated with the error message(s) and the import is terminated.

It is not possible to import a package, if the package file is:

- Corrupted.
- Changed manually by the user (xml files) for adding/removing components.
- Imported with the individual components that are changed (e.g. changed xml file).
- Created from an export of R17 or older release.

It is also not possible to import a package, if:

- The measurement unit in the package differs from that in the environment in which the package is imported.
- Any BO (in FieldDefiner) is **Under construction**.
- A Loose export is imported in a Strict mode.

Importing PSS web definitions across property sets

When exporting PSS web definitions, the corresponding site is also exported. When importing into another property set, the site and web definitions are recreated. Take the following steps if you want to import the web definitions into an existing site of another property set.

1. Go to Layout Manager > Sites business object and add the Import - export code field to the layout.
2. Go to PSS Manager > Edit sites.
3. Change the value of the Import - export code field to the site code of the property set into which you want to import the web definitions.
4. Go to Configuration Transfer and export the web definitions (for more information, see Select the PSS web definitions.
5. Switch to the destination property set and go to Configuration Transfer.
6. Import the zip file containing the export package.

Select the option Use current property set.

Your web definitions are imported into the existing site.

Importing references of PSS web definitions

When a reference of a PSS web definition (for example, a standard order) is not available, no error will be shown (not even when the field is mandatory). Instead, a warning is shown.

Importing Approved messages

When importing approved messages, all the existing approved messages will be removed first so that the list of approved messages in the import environment looks exactly like the list in the exported environment.

Importing File locations and WebDAV settings

File locations and WebDAV settings cannot be imported when using a Cloud environment.

Importing system images

When importing system images, these are put back on WebDAV. If a file with the same name already exists, it will be overwritten by the import process.

Importing configuration

As import affects/changes the target configuration, it should be done beyond office hours.

Procedure

1. Go to **Jobs**.

   This level has two steps:

   - Transfer jobs: here you find all 'regular' **Configuration Transfer** jobs.
   - Labels: here you find jobs that are specific to **Configuration labels**.

2. Select the appropriate step and click **Import configuration** on the action menu.

   The **Configuration import wizard** appears.

3. Perform the following steps in each wizard screen:

- Select package
- Define import mode
- Confirm import

Select package

Procedure

1. On this screen, select a package file (for uploading), that you want to import. Its name and contents are displayed in the corresponding fields on the wizard.
2. Click the upload button and browse for the zip (package) file you want to upload.
3. Click OK. The file name and the package name are displayed in the corresponding fields.
4. Click Next.

Define import mode

Procedure

1. On this screen, select an import mode - you can select Loose/Strict depending on your choice of import.

> Note that you cannot do a strict import from a package that is created in a loose export.

2. Select the method of retrieving references for the property set. You can select from:
   - Use property set from package – This mode is used in a multi-property set environment whereby the package contains data (filters, default values) that refer to business objects in different data sections. On importing the configuration, the system will retrieve the reference in the same data section as present in the package.
   - Use current property set – This mode is used for importing a configuration into a single (current) property set. On importing the configuration, the system will only retrieve the reference within the current property set. In case of an import from a different property set, these references need to be imported earlier in order to be retrieved.
3. Click Next.

Remapping user-defined free BOs

When enabled, you can remap the fields of a free user-defined BO during import into alternative fields of the same Free BO.

Procedure

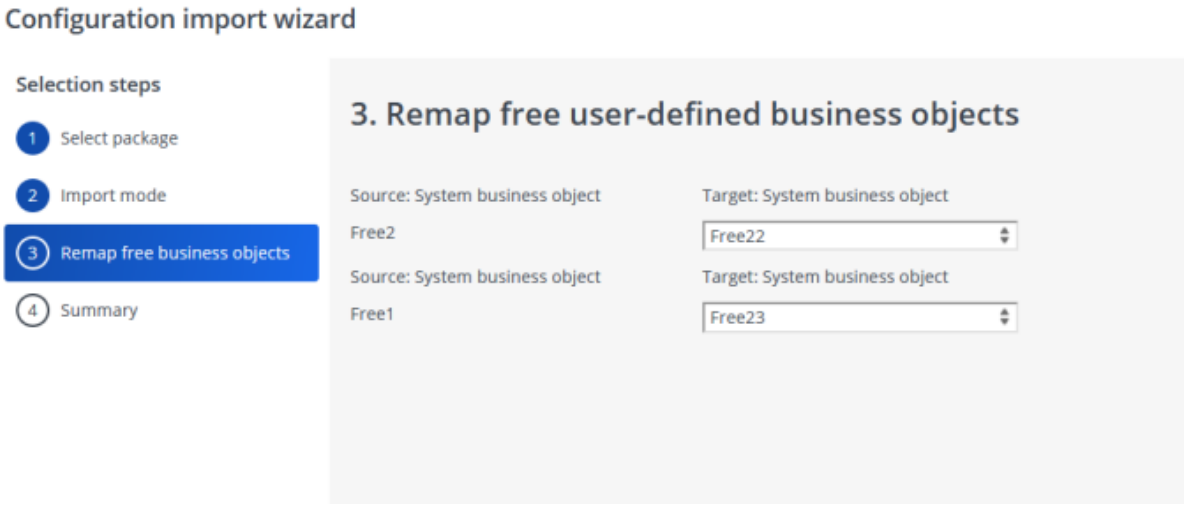
1. In this screen, select the Target: User defined BO for the Source: User defined BO.
2. Select the system BO; the available fields will be shown under Source: User defined BO.

3. For each Source: User defined BO field, you can see the allowed alternative fields for remapping under Target: User defined BO

Remapping of UDBO is possible only if the UDBOs in the source and target fields are the same system Free BO.

4. If the target field does not contain any free UDBO, you can set the default value to *No UDBO available, the system will create it*.

Before importing, you can create the free UDBO in the target field with the same system name of the source . When you do so, it is your responsibility to keep the UDBO field empty. This UDBO field can then be used for remapping.



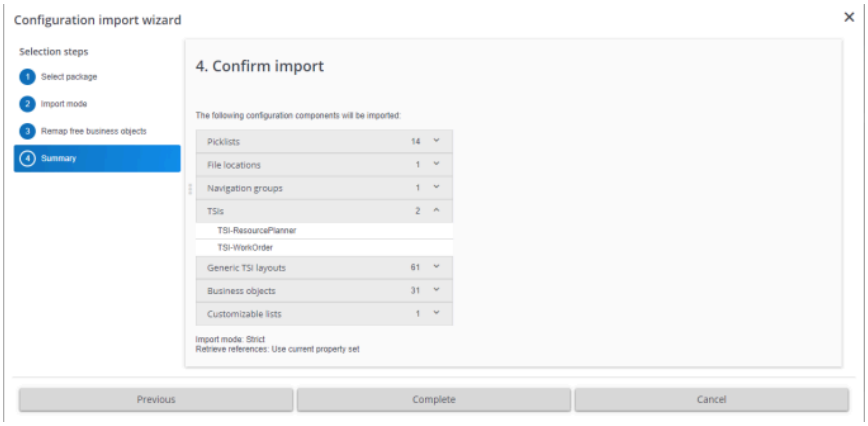
5. Click Next.

Make sure that all UDBO fields are remapped, or an error message is displayed.

Confirm import

Procedure

1. This screen displays an overview of the various components for the import. You can expand the list to view the package details.



2. Click Complete.

You are notified that the job is run as a background action. For more information about background actions, see Supporting data .

A **Configuration transfer job** is registered on the **Jobs** level with the job type as Import. The details of the imported configuration components are registered in the **Job details** level.

After the import, all changes are directly visible for the user (client) who performed the import.
However, for other users (clients) a 'Refresh all' is needed in order to see all the changes due to the import.

The following changes are done when importing translated names from a package into a target environment:

- For all languages that are present in both the environments (target and the package), the translated name as present in the package is set.
- Any errors/warnings that may occur during an import are listed in the **Comments** section of the related configuration job detail step.
- For all languages that are present in the target environment but not in the package:
- For new translations: the translated name as defined in the System setting > Default translation of the language is set.
- For existing translations: leave the translated name as it is.

Importing CAD-related business objects

When importing CAD-related business objects (drawing definitions, import definitions and mappings) the following limitations apply:

- WebDAV content (e.g. referenced CAD drawings) will not be handled by *Configuration Transfer*.

- An imported CAD drawing definition will always be in status 'Under construction'.
- Importing a CAD drawing definition will fail when the target system already contains a CAD drawing definition with an identical name that is in status 'Completed'.
- Importing a CAD drawing definition will create and update child BOs (e.g. CAD Field Mappings) but will not delete them.
- Behavior will be undefined when certain business objects are not uniquely identifiable. This is the case in the following situations:
  - When multiple CAD linked business objects have the same *name*, the same *subtype*, and reference the same *CAD drawing definition.*
  - When multiple CAD business object mappings have the same *subtype*, reference the same CAD Layer, and reference the same CAD linked business object.
  - When multiple CAD field mappings reference the same business object and **Business Object** field, and reference the same CAD linked business object.
  - When multiple CAD import definitions have the same *code* and *name*.
  - When a CAD import definition references a user report through the fields **Additional floor info** (AdditionalFloorInfo) or **Additional space info** (AdditionalSpaceInfo) **and** multiple user reports with that name exist.

Troubleshooting

The following topic(s) describe(s) specific information that is important to keep into account.

Filtering on system name

The navigation group and TSI each have their own system name. This name is unique across environments.

When moving a configuration from one environment to another by using Configuration Transfer, errors will appear if the combination is not unique. You can subsequently fix this by altering the combination in the target system.

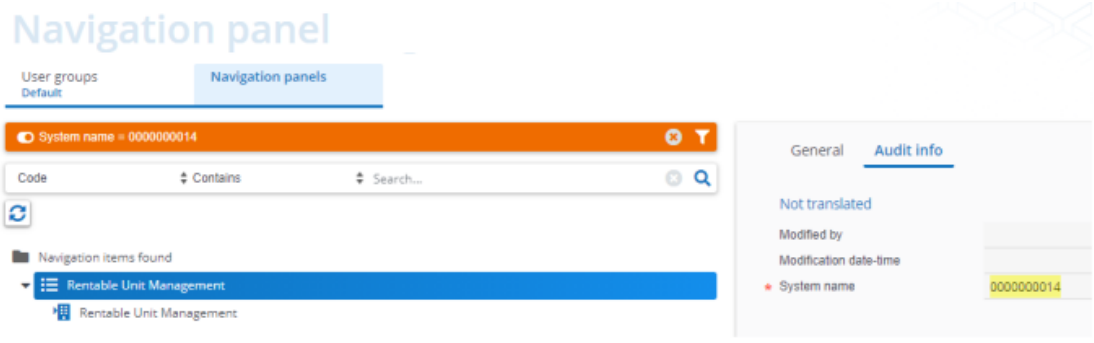
By filtering on system name you can get a list of navigation group and TSI combination. This will enable you to identify and fix the issue in the target system.

How to find this unique combination?

The navigation group as well as the linked TSI both have a **System name** field:

Component	Location
Navigation group	**Audit info** tab > **System name**
Navigation item	**General** tab > **System name**

By using the quick filter options on top of the navigation panel's element list, you can filter on the navigation group's **System name**.



However, this does not give you the unique combination of navigation group and navigation item.

You can solve this by creating a user report that includes both fields (using a sub-report for the underlying item):

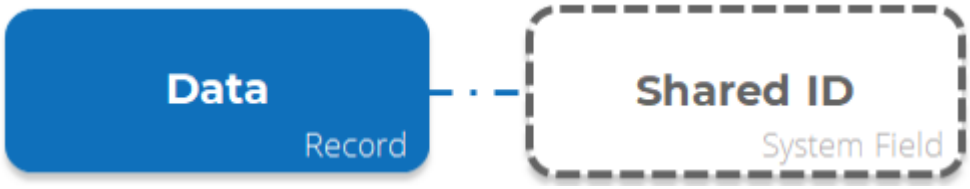
Group - System name	Name	TSI - System name	Name
0000000014	Rentable Unit Management	0000000032	Rentable Unit

This allows you to identify the items in your target system and take appropriate action to resolve the import.

Synchronizing records

A **Shared ID** is a unique, mandatory, and insert-only system field.

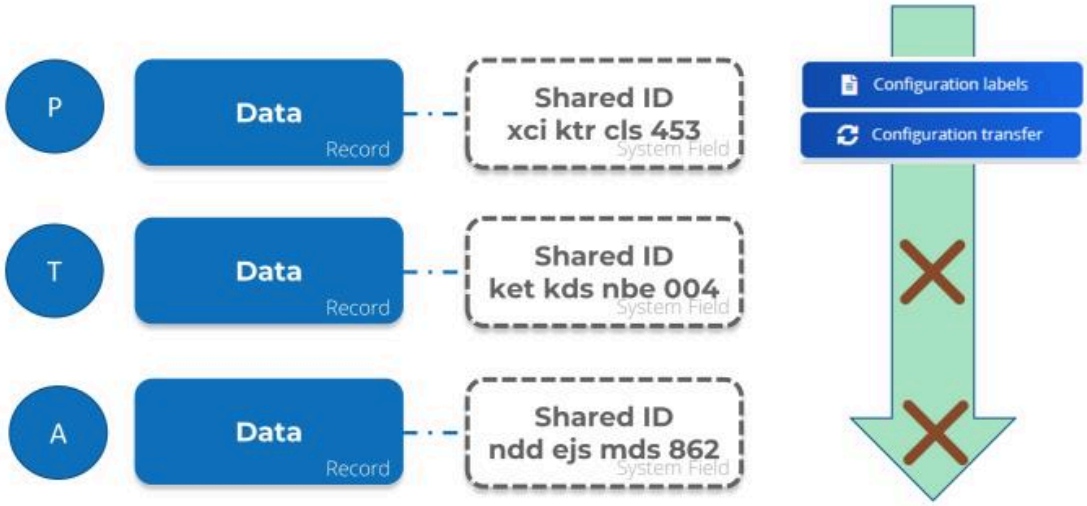
It's purpose is technical: to uniquely identify a record. This is why, while creating a record, the user is not aware of it or needs to worry about it: it is auto-generated during record creation and it cannot be updated later.



Problem

Because of its technical nature, this field is not enabled in GUI and - thus - the user cannot supply a value while creating record via the user interface.

This is problematic when synchronizing data across DTAP environments. If there is no way to synchronize data along with their **Shared IDs**, then the same record in Dev and Test will have different **Shared IDs**, which is functionally incorrect.



This - in turn - is problematic for Configuration Transfer/ Configuration labeling and CAD drawings: it will fail to match the data record with its **Shared ID** in the source and target environments.

Solution

To solve this issue, the **Shared ID** field has been enabled for Enterprise Talk and SDI.

This means that it is now possible to supply the **Shared ID** value while creating a new record using these tools (it needs to be unique, or it will fail).

If you do not provide any value in Enterprise Talk/SDI document or do not include the field in the Enterprise Talk/SDI document, then it will have a unique default value.

How does this work

The **Shared ID** field was introduced in L69. Consequently, when upgrading to L69 (or later) all the relevant records will have this new field, populated with a unique default value.

So, when upgrading DTAP environments separately to L69 this will result in the same records in Dev, Test, Acceptance and Prod having different **Shared IDs** - as already explained.

To solve this issue, we strongly recommend that after the upgrade to L69 is completed to copy the Prod DB to all the lower DTA(P) environments so that for all the existing records the **Shared ID** is in sync across all the DTAP environments.

Technically, it is required only once to copy the Prod DB to lower DTA(P) when you first-time upgrade to L69.

Once all the DTAP environments are in sync you can use the environments as usual.

Going forward, any time if you create a new record in let's say a Dev environment, then you must import that record along with its **Shared ID** to Test and other environments using Enterprise Talk or SDI. Otherwise, records will not be in sync in the DTAP environments, and this will create issues in Configuration Transfer/Configuration Labeling as discussed.

However, synchronizing the **Shared ID** via Enterprise Talk and SDI only works from L75 onwards. So, any new record can be imported to other environments with its **Shared ID** only from L75 onwards. This means that between L69 to L74 there is no way to sync the **Shared ID** for new records and for that you must upgrade to L75. But existing records will work fine between L69 to L74 - provided you copied the Prod DB to lower DTA(P) environments during the upgrade for L69.

Recap

- When you first-time upgrade to L69 then do not forget to copy the Prod DB to the lower DTA(P) environments.
- If you are below L75, then there is no way to sync the **Shared ID** for the new records.
- From L75 onwards, if you create a new record then you must always first import the data with **Shared ID** to other DTA(P) environments before using Configuration Transfer/Configuration Labeling to avoid the **Shared ID** issues.

As always: first import data, then configuration.

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