KMD WORKZONE
_export/import

2021.1

WorkZone Export/Import

Contents

1. WorkZone Export/Import 2021.1
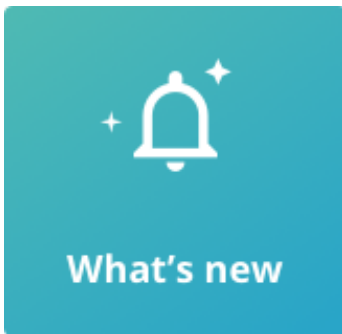
WorkZone links

- [WorkZone documentation](#)
- [WorkZone support](#)
- [WorkZone website](#)
- [WorkZone portal](#)

2. What's new

This is the first release of the WorkZone Export/Import.

3. About WorkZone Export/Import

WorkZone Export/Import is a tool that you can use to move a WorkZone configuration from one WorkZone instance to another.

There are many different scenarios where it can be useful to set up a configuration in one WorkZone instance, and reuse the same configuration in another WorkZone instance.

WorkZone Export/Import it is a command line tool that can export a configuration from WorkZone to a JSON file. The configuration stored in the JSON file can then be imported in to another instance of WorkZone.

In this first version, not all WorkZone configurations are covered by the tool, and all the covered configurations are always included in both the export and the import. In other words, it is not possible to select only a specific part of the configuration for export or import. More configurations will be supported in coming releases with the long-term goal to support all configurations.

See Supported configurations.

Usage scenarios

Deploy verticals

In KMD, we use the Export/Import tool for deployment purposes. For example, WorkZone can be configured for specific vertical markets. As an example, we have one Contract Lifecycle Management (CLM) vertical. If we need a new environment setup for a new CLM customer, we will use this tool to apply the configuration.

Move configurations between environments

You can also use the Export/Import tool in existing running WorkZone systems. A typical usage may be that you have several different WorkZone instances that you use for staging and production. In this case, you can use the tool to move the configuration from the staging environment to the production environment.

4. Supported configurations

WorkZone Export/Import supports export and import of the following configurations:

Client configuration Org
Office configuration
Case categories
Case custom fields
Contact custom fields
Document custom fields
All roles for all relations
Case number (taxonomy)
Validation rules
Custom droplist
Custom Types with properties
Saved searches
Retention policies

5. Prerequisites

1. Windows operation system - versions compatible with .NET Core 3.x, see [Install .NET on Windows](#) in the Microsoft documentation

2. Credentials to access OData.

3. Access to OData with read permissions for all data to export configuration.

4. Access to OData with read/write permissions for all data to import configuration.

Credentials to access OData can be described differently depending on authentication mode:

NTLM

- OData user name

- OData user password

- OData user domain name

OAuth2

- OAuth client id

- OAuth client secret

OAuth client can be configured using WZ Configurator under Global -> OAuth2 settings. It should be configured with the following settings:

- Enabled = true

- Allow Access Token Via Browser = false

- Allow offline access = false

- Require proof key for code exchange = false

- Grant type = CLNTCRED, Client credentials

- User = <any user with access rights described in step 3 and 4 about>

6. Execute

WorkZone Export/Import has a command line interface based on verbs. The commands must follow a specific structure:

`WZImportExport.exe <verb> <option>`

where the verb specifies the main action, which is import or export.

Options can be used by their whole names or short one letter names. The hierarchy of parameters can be described as follows:

export–Exports WorkZone configuration from the database to a text file

- `contentServerUri [short name: o]` - URI to content server

- `filepath [f]` - Path of the exported file

- `oAuthClientId [i]` - OAuth client id

- `oAuthClientSecret [s]` - OAuth client secret

- `username [u]` - OData username

- `password [p]` - OData user password

- `domain [d]` - OData user domain name

import–Imports a WorkZone configuration from a text file to the database

- `contentServerUri [short name: o]` - URI to content server

- `rollbackOnError [r]` - Specify if rollback should be performed in case of certain import errors, default=False

- `filepath [f]` - Path of the exported file

- `oAuthClientId [i]` - OAuth client id

- `oAuthClientSecret [s]` - OAuth client secret

- `username [u]` - OData username

- `password [p]` - OData user password

- `domain [d]` - OData user domain name

help– displays a help page, which resembles the hierarchy (the first page displays verbs and after providing a verb it displays help page for the specific verb), for example help import.

Version–displays version of the tool (currently not supported).

The user should provide either oAuthClientId with oAuthClientSecret or username with password and domain. If user wants to use the current user account on NTLM setup, the application can be launched without authentication info, like:

Rollback

`.\WZImportExport.exe export --contentserveruri <url> --filepath <path>`

A **RollbackOnError** option exports the current database configuration to a temporary location before doing the import. You will be notified about the path and in case of errors, it will try to restore the database to its original state. If the import is successful and you have turned on the **RollbackOnError** option, the temporary backup file will be deleted at the end. The import file is stored in the current user's temporary folder (usually `C:\Users\<USER>\AppData\Local\Temp`) with a name containing the exported file name, the date of the export, and a unique ID:

Examples

`import_<exportedFileName>_<dd.MM.yyyy_HH.mm.ss>_<8-letters GUID>.json`

Export configuration from an NTLM environment

Exports the configuration from an NTLM environment (being logged in to this environment). The The address of the WorkZone database is `http://db01/`, the path to the exported file is `C:\temp_user\config4.json`.

Note that you must launch the application with administrative rights to be able to write to destinations other than user specific destinations such as for example MyDocuments.

```
.\WZImportExport.exe export --contentserveruri http://db01/ --
filepath C:\exported\config4.json
```

Export configuration from a remote NTLM environment

Exports a configuration from a remote NTLM environment to a file on a local drive using short names for options and a user name with password.

```
.\WZImportExport.exe export --o https://sandbox.connectzone.dk/ --f
C:\exported\config4.json --u testUserName -p testUserPassword
```

Import configuration to local environment

Imports a configuration to a local environment named `db01` using OAuth2 authentication with `WZIE_Client` as the client ID and `testPswd` as password.

```
.\WZImportExport.exe import --contentserveruri http://db01/ --filepath
C:\exported\config4.json --oAuthClientId WZIE_Client --oAuthClientSecret
testPswd
```

Import configuration to local environment with rollback

Imports a configuration to a local environment named `db01` using OAuth2 authentication with `WZIE_Client` as the client ID and `testPswd` as password with the **rollbackOnError** option turned on, and using short names.

```
.\WZImportExport.exe import --o http://db01/ --f C:\exported\config4.json --i
WZIE_Client --s testPswd --r
```

7. Terms and conditions

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