KMD WORKZONE

_export/import

2021.3

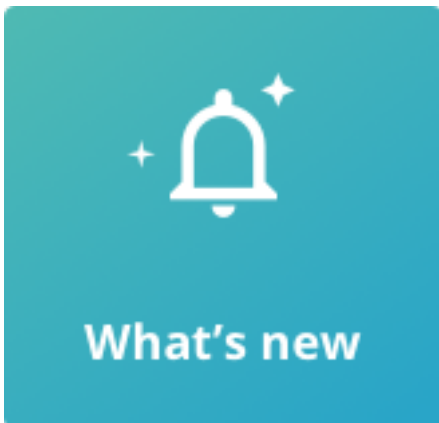WorkZone Export/Import

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WorkZone links

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What's new

No changes in this release.

WorkZone Export/Import 2021.1

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

About 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 several different scenarios where it is useful to set up a configuration in one WorkZone instance, and then reuse the same configuration in another WorkZone instance.

WorkZone Export/Import 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 to another instance of WorkZone.

In this first version, the tool does not support export and import of all WorkZone configurations. See the list of Supported configurations. More configurations will be supported in coming releases with the long-term goal of supporting all configurations. Please note that all the sup-ported configurations are always included in both the export and the import. In other words, it is not possible to select only specific configurations for export or import.

Usage examples

Deploy verticals

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

Move configurations between environments

You can also use the Export/Import tool in existing running WorkZone systems. For example, if you have different WorkZone instances that you use for staging and production respectively, you can use the tool to move the configuration from the staging environment to the production environment.

Supported configurations

This topic outlines the WorkZone Configurator and WorkZone Client configurations that can be exported and imported using WorkZone Export/Import.

WorkZone Configurator configurations

The following configurations can be exported and imported:

Configuration		Read more
Office configuration	Exports WorkZone for Office configurations such as configurations on the **Office** > **Outlook configuration** and **Office template path** pages.	WorkZone for Office settings
Case categories	Exports case categories that are configured on the **Case** > **Properties** page.	Properties and About cases
Custom fields	Exports custom fields on cases, documents, contacts, and addresses that are configured on the following pages: • **Case** > **Custom fields** • **Document** > **Custom fields** • **Contact** > **Custom fields** • **Addresses** > **Custom fields**	Custom fields
All roles for all relations	Exports case, document, and contact parties and references that are configured on the following pages: • **Case** > **Case parties and references** > **Case party roles**, **Case references**, and **Document references** • **Document** > **Document parties and references** > **Document party roles** and **Document references** • **Contact** > **Contact reference roles**	Parties and references
Case number format	Exports the case number format that is configured on the **Taxonomy** > **Case number format** page.	Case number format

Configuration		Read more
Validation rules	Exports validation rules associated with text custom fields. The validation rules are configured on the **Global** > **Validation rules** page.	Validation rules
Custom droplist	Exports custom droplists that are configured on the **Global** > **Custom droplists** page.	Custom droplists
Custom types with properties	Exports custom types with properties that are configured on the **Global** > **Custom types** page.	Custom types
Retention policies	Exports retention policies that are configured on the **Retention** > **Retention policies** page and the default retention police specified on the **Default retention policy** page.	Rentention policies Define default retention policy

WorkZone Client configurations

The following configurations can be exported and imported:

Configuration		Read more
Organizational WorkZone Client configurations	Exports WorkZone Client organizational configurations that an administrator has distributed to a whole organization.	About WorkZone Client configuration
Saved searches	Exports searches that have been saved in WorkZone Client.	Save and reuse saved searches

Prerequisites

Prerequisites for running the Export/Import tool are:

1. Windows operation system–versions must be 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

You can configure the OAuth client using WorkZone Configurator. Click **Global** > **OAuth2 settings**. You must configure the OAuth client with the following settings:

- **Enabled**–Turned on

- **Allow Access Token Via Browser**–Turned off

- **Allow offline access**–Turned off

- **Require proof key for code exchange**–Turned off

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- **Grant type**– CLNTCRED, **Client credentials**

- **User**–<any user with the correct access rights>–See steps 3 and 4 above.

See Create a new OAuth2 setting in the WorkZone Configurator Administrator Guide.

Run the Export/Import tool

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

```
WZImportExport.exe <verb> <option>
```

where the verb specifies the main action. The verb can be either `import` or `export`.

You can use options by their whole names or short one-letter names. The hierarchy of parameters can be described as follows:

Export

export exports a WorkZone configuration from the database to a text file.

- `contentServerUri [short name: o]` - URI to the 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

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 the help page for the specific verb), for example help import.

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

You must provide either `oAuthClientId` with `oAuthClientSecret` or `username` with `password` and `domain`. If you want to use the current user account in the NTLM setup, the WorkZone Export/Import can be launched without authentication info, for example:

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

Rollback

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:\User-s\<USER>\AppData\Local\Temp`) with a name containing the exported file name, the date of the export, and a unique ID:

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

Examples

Export configuration from an NTLM environment

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

> **Note:** You must launch the application with administrative rights to be able to write to destinations other than user specific destinations such as 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://sand-
box.connectzone.dk/ --f C:\exported\config4.json --u testUser-
Name --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 client secret.

```
.\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 client secret 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
```

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