

Migrate Lasetnet CE Connector Configurations between Environments

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Introduction

When working with Lasetnet CE connector, configurations will likely need to be migrated between environments for testing. A number of different options are available:

- Configuration migration tool: This is the standard tool for migrating data between Customer Engagement apps. It is supported by Microsoft® and is Formpipe's recommended solution. We provide a schema for migrating all Lasetnet CE Connector configurations. To migrate individual entities, the user will need to create a custom schema.
- XrmToolBox data transporter tool: This is a custom third-party tool. Several users find it simpler than the Configuration migration tool. Formpipe does not provide templates. However, the tool can be easily used to migrate individual entities or configured to migrate all entities in order.
- Excel templates: These can be hard to set up but can still be used to export/import data from CE apps or to make changes to the data in Excel.

Configuration Migration Tool

For more information on Microsoft's® standard tool for migrating data between Customer Engagement applications, visit [this link](#).

This utility does not require extra licenses and can be run from the desktop client, command line, or as part of a build.

It is recommended that the destination environment be backed up first and the configuration wiped before every import, as the utility only inserts new entities and updates fields for existing entities if the record is included and the field contains a value in the backup.

The tool does not remove excess entities, relationships between entities, or field values if no value is supplied.

If you are manually deleting all Lasetnet records from the UI, we recommend deleting relationships between every Group and Flyout/OData Dialog/HTTP method/OData Direct Submit before moving on to the other entities.

This article includes a schema for migrating Lasernet CE Connector 1.1 configurations. The file can be found at the end of this article.

The schema uses the records' ID to find existing records, except for HTTP Method, OData Dialog, and OData Direct Submit, which all use the records' Name. The Button entity uses the Control ID.

Therefore, existing records with the same Name/Control ID will be overwritten in the destination environment.

Only links between Group and Flyout/OData Dialog/HTTP method/OData Direct Submit containing a value for the group and the action will be imported. Links serve no purpose without both values and will only hinder performance.

Installation

1. Ensure that .NET is installed (version 6.0 is currently recommended):

<https://dotnet.microsoft.com/download>.

2. Download and install the Power Platform CLI from the command line: **dotnet tool install --global Microsoft.PowerApps.CLI.Tool**

a. If the following error occurs, the standard NuGet source may be missing:

Error

error NU1101: Unable to find package microsoft.powerapps.cli.tool. No packages exist with this id in source(s): Microsoft Visual Studio Offline Packages

b. Run the following command to display NuGet sources: **dotnet nuget list source**.

You should be able to find [nuget.org](https://api.nuget.org/v3/index.json) [Enabled] within the list:

<https://api.nuget.org/v3/index.json>.

c. If the source is missing, the following command will add it: **dotnet nuget add source https://api.nuget.org/v3/index.json -n nuget.org**.

d. If the source is disabled, the following command will enable it: **dotnet nuget enable source nuget.org**.

It is recommended that the CLI be updated regularly using the following command: **dotnet tool update --global Microsoft.PowerApps.CLI.Tool**.

3. Install and start the Configuration Migration Tool (CMT) using the following command: **pac tool cmt**.

Export Data

1. Navigate to the start menu and search for **Configuration Migration Tool**.

2. Click **Export data** and then **Continue** to export data from the source environment.

3. A wizard will be shown. Select **Office 365**.
4. Select the **Display list of available organizations** checkbox.
5. If the same account is used for exporting and importing, it is recommended to check the **Show Advanced** checkbox and then enter your credentials when prompted.
6. Click **Login** and follow the steps.
7. Select the source environment from which data needs to be extracted and click **Login**.
8. In the **Schema file** field, select the schema supplied by Formpipe. This will migrate all of the Lasernet CE Connector configurations using the logic explained above.
9. In the **Save to data file** field, specify a path and filename for the export.
10. Click **Save** and then **Export Data**.

The system will show you the entities which are being exported:

11. Validate that the exported records match your expectations.
12. Click **Exit**.

Import data

1. Navigate to the start menu and search for **Configuration Migration Tool**.
2. Import data from the source environment by clicking **Import data** and then **Continue**.

The login for import uses the same setup as with export.

3. Click **Login** and select the destination environment.
4. In the **Zip File** field, select the previously exported file.
5. Click **Open** and then **Import Data**.

The configuration has been successfully imported.

XrmToolBox Data Transporter Tool

This is a third-party tool used by many CE developers. Formpipe always recommends using the default Microsoft ® solution. However, if you are familiar with the XrmToolBox, it can be a quick and easy solution.

Download XrmToolBox

Download the latest version of the XrmToolBox from [this link](#) and run through the simple installation steps.

Create a Connection

1. To connect the XrmToolBox to your environment, click **Connect**.
2. Click **New**.
3. Click **Connection Wizard**.
4. Add the URL of your environment.
5. Clear the **AD and IFD instances only** checkbox and then click **Next**.
6. Provide the credentials.

The wizard will try to connect.

7. When the connection is successfully established, the system will ask you to provide a name for the connection. Once you are done, click **Finish**.

The connection is now created:

8. Repeat the process for your source and destination environments.

Use the Data Transporter Tool

1. In the **Tools** tab, search for the **Data Transporter**.
2. Open the tool.
3. Click **Connect** to select the data source from which you wish to extract data.
4. Click **OK** and then select the **Tools** for which you want to update the connection. In this instance, the **Data Transporter**.
5. Click **Checked tabs**, and your connection will be updated.
6. To connect to the target, click **Select target** and select the target environment in the same way as the source.

Select the Entities

1. In the **Filter**, search for **Lasernet**.
2. To migrate an individual entity, select it from the list under **Available Entities**.
3. Click **Transfer Data**.

This will copy the data from that source entity to the destination. The tool provides options

to control the create/update/delete settings.

4. To copy multiple entities, for example, the whole configuration from one environment to another, select the entities you wish to migrate and click the **Download** symbol.

5. Save them in a sensible location.

6. Once you have saved all the configurations, navigate back to the Data Transporter Tool and click **Playlist**.

7. Click **Add Configuration** and then select all the entities you wish to migrate.

8. Click **Open** and the entities will show in the playlist.

9. Use the arrows to modify the sequence. When you are happy with it, click **Transfer Data**.

The tool will migrate the data for you:

10. Click **Close** and then **Open environment**.

11. Ensure that the data is in the new environment as expected.

Excel Templates

Users also have the option to create Excel templates to import/export data from CE environments.

Follow [this link](#) to consult Microsoft ® documentation.

This tool can be useful for migrating data for only one entity or for making some changes to the data before it is loaded into the target system.

Attachments

- [Lasernet_1_1_0_0_CMT_Schema.xml \(16.14 KB\)](#)