Change Management

Saturday, September 19, 2015 4:36 PM

You can create a Sandbox through Setup -> Sandbox: Create
Sandboxes can reflect the Data after refreshes.

Metadata - The API name, data type, and field label for a custom field
Data - Values of the field

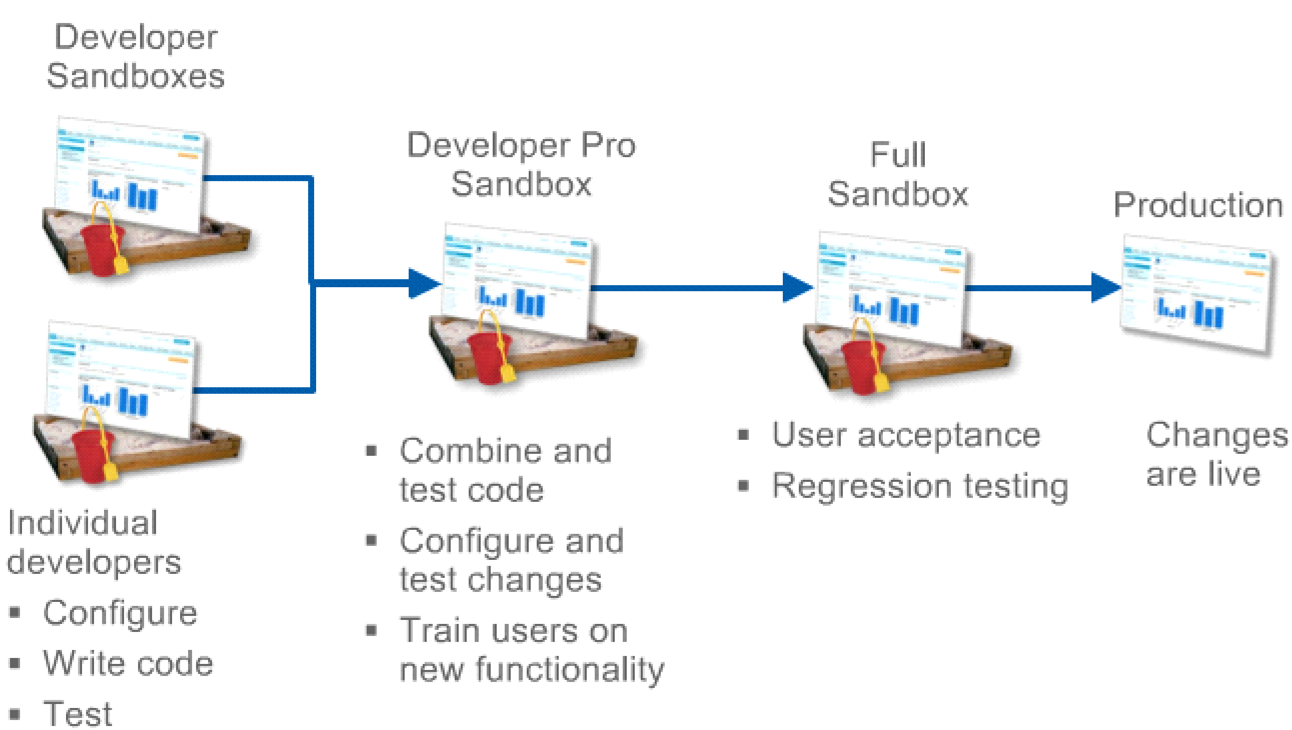
Sandboxes:

Full	Copies metadata and data. Storage limit based on production organization. Can be refreshed every 29 days.
Partial Data Sandbox	Copies metadata and data. Storage limit of 5 GB of data and a maximum of 10,000 records per selected object. Can be refreshed every 5 days.
Developer Pro Sandbox	Copies only metadata. Does not copy data, but can load up to 1 GB of data separately. Can be refreshed once per day.
Developer Sandbox	Copies only metadata. Does not copy data, but can load up to 200 MB of data separately. Can be refreshed once per day.

Sandbox template:

When the full sandbox is created with a template, the objects an administrator wants replicated are selected.
When a sandbox template is applied to a Partial Data sandbox, Salesforce samples a subset of the production data and loads it into the sandbox org.

Recommended Sandbox setup:



Different Tools to Deploy Metadata

Change Sets	Used to deploy metadata from a Sandbox organization to either another Sandbox organization or Production.
Force.com IDE	Standard development environment used to move metadata from one organization to a related or unrelated organization. Allows developers to modify or delete metadata before deploying it to another organization, and manage changes in a source code control system.
Force.com Migration Tool	Used to move metadata from one organization to a related or unrelated organization using an Apache ANT script. Allows developers to modify or delete metadata before deploying it to another organization, and manage changes in a source code control system.

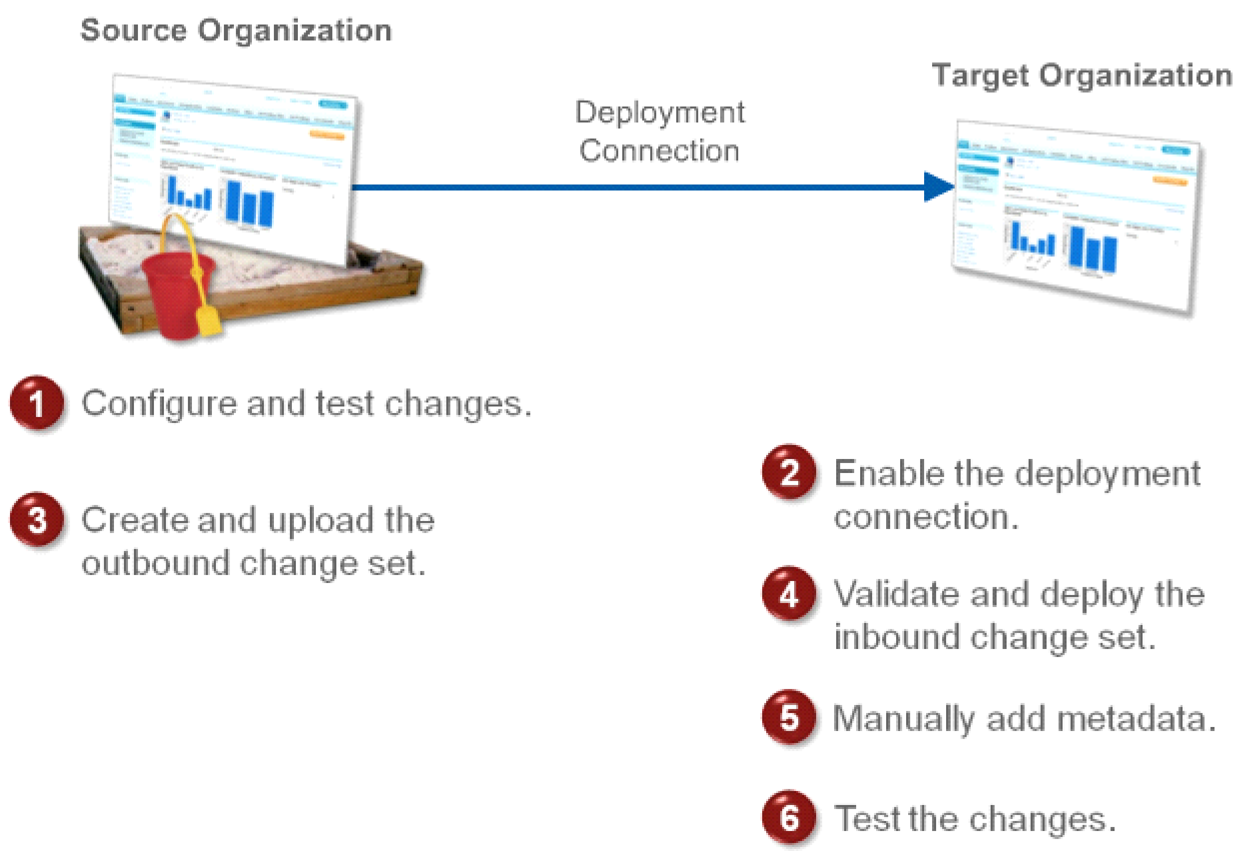
Distribute Components using Unmanaged packages

Collection of application components that are uploaded to the app exchange, then deployed to another organizations.
Primarily used for companies that have multiple production organizations. Once it has been deployed, any changes made to the organization will not be broadcasted to other organizations.

Change Sets Overview

Sending a change set between two organizations requires a ***Deployment Connection***, which is automatically generated every time a sandbox is created. Change sets allow for sets of changes to be moved to production from a sandbox. Only specific users are authorized to do change sets and must have 'Deploy Change Sets' and 'Create and Upload Change Sets' profile permissions.

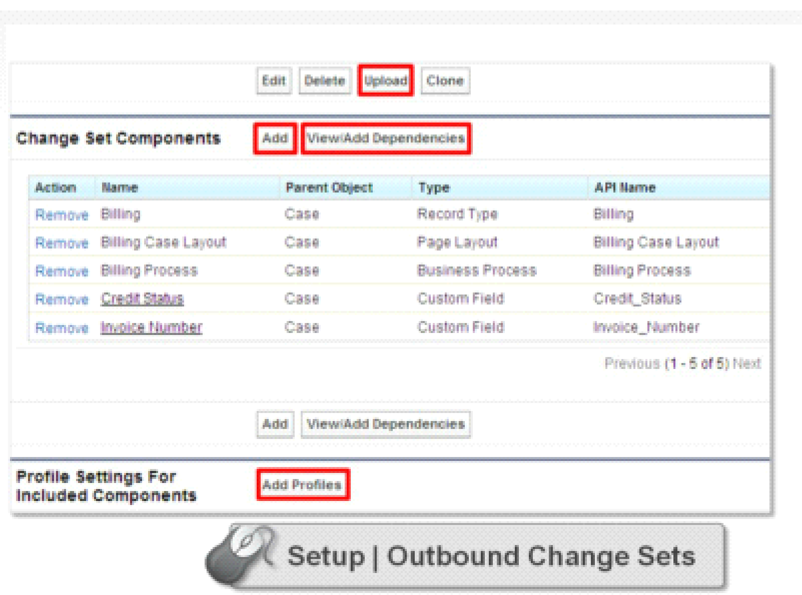
Source Organization = Sandbox
Target Organization = Production Environment



Track these changes using the Audit Trail:

Setup -> Security Controls -> View Setup Audit Trail

In order to enable a deployment connection, you must enable the 'Allow Inbound Changes' field in the Production organization.



Add Components (**Add**) - Select the Component Type, then add the Name of the Type that you need to the change set.

Add Dependent Components (**View/Add Dependencies**) - A dependency is a relationship where one component must exist for another component to exist, such as a record type and a business process. The outbound change set must contain all interdependent components that don't exist in the target organization, otherwise, the deployment will fail.

Add Profiles (**Add Profiles**) - The profile settings associated with the selected components will be added to the change set. Change sets only support some profile settings. The do not support standard object permissions, standard field permissions, and user permissions. However, you can include permission sets in a change set.

Upload Change Set (**Upload**) - Once a change set is uploaded, you will not be able to edit or recall the change set from production. However, you can clone the change set, then edit it.

You can **Validate** a change set in the Target Organization by navigating to Setup -> Inbound Change Sets. Validating allows you to view the success or failure messages that are received with an actual deploy. A change set is deployed in a single transaction. If the deployment is unable to complete for any reason, the entire transaction is rolled back. All changes after deployment are committed to the organization and the change set can't be rolled back.

Installed metadata never merges with existing metadata. It always overwrites existing metadata. Renamed metadata components are seen by the incoming system as new components. Change sets cannot be used to delete metadata components in the target organization. These components must be deleted manually.