Deploy DAM configuration to PRD

This document contains checklist of items that you would need to take into account when moving configuration from DAM SB to DAM PRD.

**Please know that provided list is not a comprehensive example!** The Application Consultant is ultimately responsible for keeping track of what configuration is performed in SB during the duration of the Activation project and therefore needs to be moved to production. So doublecheck the list below, add items that pertain to your project or remove the ones that do not seem necessary for your deployment.

**Items that are absolutely necessary for each deployment are**:

* Keeping logs saved from tooling for each import
* Doing manual checks/validations to confirm import is successful
* Exporting configuration from SB and PRD at the end, and comparing exported workbooks

# Part 1: General DAM Configuration – using DAM Configuration Mover export/import and manual methods

## Preparation

* 1. Enable all feature flags - use cloud manager to check (can be done at the beginning of the project, or before the production deployment is completed, add feature flags to the list below as needed, or remove ones that are not applicable)
  2. Export
     1. To use the deployment tools, make note of the following in SandBox and in Production:
        1. Registration/domain of environment
        2. Username for the user who is running the import. For the import to be successful, that needs to be user with system administration privileges
        3. Create and copy user token (<https://developers.aprimo.com/marketing-operations/rest-api/authorization/>)
        4. Customer registration ID (<https://developers.aprimo.com/marketing-operations/rest-api/authorization/>)
     2. Export all objects from already setup environment (SB1)
     3. Make note of the folder path that the XML's are saved (it will be used for the import)
     4. Remove (as needed) any lines from the XML that do not need to be imported:
        1. Example: remove OOTB workflow classification entries (approved, default, approvedWichChanges and rejected) because they already exist in PRD

## Running Import

 Make sure to follow the checklist and close the executable after every import

As each import is completed, save the log files to review errors by using “Save Log To File”

1. Field groups
2. Classifications - check first box
3. Field definitions:
   1. Check all default values once import is complete
   2. Manually verify triggers for field definitions that have default values (make sure to check all fields that have trigger = On Field Change)
   3. Manually assign the Summary Title field again in Record Link fields, e.g. to DisplayTitle
   4. Manually verify all Duration, Hyperlink, Rich Content, Language List, User Group list, Record List, Record Link, and Date field definitions
4. Classifications part 2 - check both boxes (Import Classifications and Import classification field values boxes)
5. Setting Values
   1. Click on the “Select settings” button next to the Export Settings checkbox, select the settings you’re interested in exporting, as well as user groups if setting is changed on user group level (you should highlight all settings in both columns if you are doing a full prod migration)
   2. Select setting . draftRecordDefaultClassification to be exported for any user groups that have it configured in SB – this setting does not have a value on System level, only on user group level!
   3. User level settings will need to be configured manually as needed (not common as most setting are set to the system or user group level)
   4. Manually update facets config. After uploading Settings, these would be "Configured" partially – facets linked to fields will have wrong field ID references, facets linked to Classifications will have wrong classification ID references
   5. Manually update Assets UI spaces config. After uploading Settings, these would be "Configured" partially - references will have wrong IDs of objects from SB
6. Create Content Types manually in system
7. Create Watermarks manually in system
8. Rules
   1. Not all rules will get pulled over - manually check each rule in PROD and compare to sandbox (Watermarks for example – if the watermark has not been created in the system prior to the import of watermarks, the rule won’t get imported)
9. Translations recreated manually (follow the naming convention from SB1)
   1. Menu items
   2. Actions items
10. For configuration items where you might have used relative URL to SB1 environment (such as default values of fields, notification settings, rules), make sure to note them down prior to deployment and correct relative URL to point to PRD environment.
11. ☐ For Classifications under Workflow branch:
    1. Manually delete those classifications if you have copied them over from SB
    2. Find OOTB classifications default, approved, approvedWithChanges, rejected and change parent for them – instead of being top level classifications, they should be placed under Workflow classification

# Part 2: **Security** export/import (security exporter and security importer tooling)

## Preparation

 Make sure to follow the list and close the app after ever import

 As each import is completed, save the log files to review errors

1. Ensure that you have the following handy for SandBox and Production:
   1. Registration/domain of environment
   2. Username for the user who is running the import. For the import to be successful, that needs to be user with system administration privileges
   3. Create and copy user token (<https://developers.aprimo.com/marketing-operations/rest-api/authorization/>)
   4. Customer registration ID (<https://developers.aprimo.com/marketing-operations/rest-api/authorization/>)
2. Export User groups/Functional Permissions/Classification Permissions from SandBox
3. Clean up the User Group spreadsheet prior to importing into Production. Do the following:
4. Delete all ADMIN groups from spreadsheet - **Do not attempt to update security** (domain rights) **for Admin/Sys Admin groups**
   1. Note: If ADMIN groups are imported, support will need to get involved to help fix the issue
5. Never import user groups or permissions for OOTB DAM or PM groups – exclude these from import files, or any PM only related groups:
   1. DAM Administrators Groups
   2. DAM Operators Group
   3. Band portal anonymous access
6. Delete all IDs associated with user groups, do not remove the column though in the export file!
7. Spreadsheet should have User Group Names and Domain Rights
8. The export for user groups from one environment might not include the Descriptions column for those user groups, but it is necessary (even if it’s empty) for correct import
9. Spreadsheet must contain these columns and in this order: User Group ID, User Group Name, DAM User Group ID, Status, Finance Group, Description, Domain Rights
10. Worksheet tab name needs to match what you are doing (e.g. User Groups)

5. Clean up the Functional permissions spreadsheet prior to importing into Production. Do the following:

1. LEAVE the values in column A (Functional Permission Name)
2. Column B needs to be the label of the functional permission
3. Remember to delete OOTB user groups and any other user group that does not have functional permissions (classification permission groups) and the import will do the rest
4. Worksheet tab name needs to match what you are doing (DAM Functional Permissions)

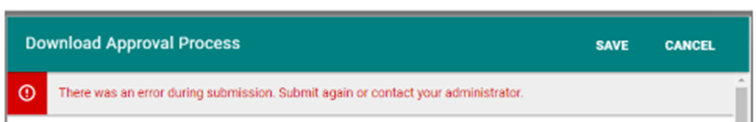
## Running Import

1. Import User Groups
2. Enter the credentials mentioned in Step 1 under Preparation
3. Select the location of the cleaned up spreadsheet for importing user groups
4. Save the log files to review errors once the import has finished
5. Import Functional Permissions
6. Enter the credentials mentioned in Step 1 under Preparation
7. Select the location of the cleaned up spreadsheet for importing functional permissions
8. Save the log files to review errors once the import has finished
9. Classification permissions
10. Admin permissions can be imported - nothing will break on it
11. Enter the credentials mentioned in Step 1 under Preparation
12. Select the location of the cleaned up spreadsheet for Classification Permissions

# Part 3: Manual copying of Content Workspace configuration

1. Recreate Spaces manually in Content Workspace
   1. For spaces based on Brand Guidelines, recreate Brand Guidelines first
   2. For spaces based on Collections, recreate the collection first
   3. Copy over the following:
      1. Search expressions
      2. Information – Title and Descriptions
      3. Space tile image
      4. Facets
      5. audience
2. Copy the JSON manually into Content Workspace for each Content Type
   * 1. Fields configuration per content types - /dam/management/contenttypes
     2. Menu Action definitions - /dam/management/actions
     3. Manually configure content type icons
3. Recreate Branding and Brand Portals
   1. Logos
   2. Primary and Secondary Accent Colors
   3. Homepage Banner
   4. Legal Links and Statements
   5. Text/Descriptions/Titles
4. For OOTB DAM workflows to work, there needs to be default Digital Asset Type configured. Check if there is already, if not, create one.

# Part 4: Finalization and checks

1. Create project team users in PROD and make sure they are in the correct user groups
2. Note: SSO might take this step away if it is already setup in PROD
   1. Enable notification service in production via SNOW
   2. Generate a new workbook from Sand Box and Production - use the DAM Config Workbook Generator
      1. Compare the two to each other – focus on comparing only the items that you configured/deployed on this project! Know that workbook will contain all configuration (OOTB items as well that you did not deploy).
      2. Compare to the customer facing workbook
   3. Enable the “PBI: DAM Dashboard Report” ID: 101000071 in Production once any asset migrations have finished by emailing Derek Sebenste
   4. Validate that the report looks accurate
   5. ☐ Double check that there is a Default Digital Asset Type otherwise the Download Approval and the OOTB workflows will not work properly.
      1. 
      2. To add a Digital Asset Type à Go to Admin à System Types à Digital Asset
      3. Click New and ensure that default = yes.
      4. 