DX PROJECT SHELL SCRIPTS

Shells scripts to assist the DX process

Abstract

There is a lot of information contained (and tangled) in Salesforce Orgs. In understanding those dependencies and relationships one can better slice components into manageable chunks to maintain and service.

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Table of Contents

DX Project Shell Scripts	3
Assumptions	3
Shell Commands	3
SFDX CLI	3
Manifest	3
Tools Used	2
Configuration	2
Standalone Shell Scripts	
analyzeOrg.sh	2
Command-line Arguments	
General Comments	5
Output	
Created files and directories	6
Example File Output for SObjects-counts.txt	6
Example File Output for packages-installed.txt	6
Force-app and mdapi Directory	
CsvSheets Directory	
Data Directory	C
Parsed Directory	C
PNG Directory	C
When to Use?	10
buildScratchOrg.sh	10
Command-line Arguments	11
General Comments	11
When to Use?	12
createProject.sh	12
Command-line Arguments	12
When to Use?	12
dotGen.sh	12
Command-line Arguments	13
General Comments	14
When to Use?	14

md_used.sh	
_	1
	10
	10
	1
Appendix: Comments	



DX Project Shell Scripts

This document outlines the shells scripts defined to support the DX Project initiative. These scripts (bash) provide a means to accelerate and encapsulate common behavior. It should be noted, these scripts are very much dependent upon SFDX command line (CLI) behavior and will likely change over the evolution of SFDX CLI.

Assumptions

Shell Commands

It is assumed the users whom maintain these scripts have a general understanding of shell scripts and shell tools (*awk*, *grep*,*sed*, *cut*, etc.). All main scripts have the ability to turn on debug mode (via the command line parameter *-d*).

SFDX CLI

Understanding general functionality of SFDX CLI is needed. This comes into play when authorizing access to a non-ScratchOrg or ScratchOrg. Many of the commands expect a username/target-name (-u) to reference the Org. For example, a common command to see what Orgs (and Scratch Orgs) one has available, sfdx force:org:list -all:

ALI	AS	USERNAME		(ORG ID	CONNECTED STATUS
streamapi william.anderson.sf02 wf-dx william.anderson.crv@				00D2D0000008znluAA 00D2i0000008dUMEAY	Connected Connected	
ALIAS	USERNAME		ORG ID	STATUS	EXPIRATION DATE	
	test-5ic test-d7c	jioj3haqjw@example.com		Expired Expired	2020-05-13	

Manifest

Below are a list of the shell scripts defined for the DX Project.

Script name	Description
analyzeOrg.sh	Utility analyzes a Salesforce Org
buildScratchOrg.sh	Utility builds a Scratch Org with needed packages (i.e. FSC)
createProject.sh	Utility creates a VS Code Project; seeded with an unmanaged Package from Sandbox
dotGen.sh	Utility to pull metadata dependencies and create a visualization (Graphviz)
md_used.sh	Utility to pull down the metadata used in an Org
sfdxUrlEncrpt.sh	Utility to encrypt a SFDX URL stored token
packConfig.sh	Utility to set environment variables
setScratchOrgJSON.sh	Utility to create a project definition file for a scratch Org
csvSheets.sh	Utility to create CSV files [awk]
filterPackages.sh	Utility to get installed package names and corresponding package Ids [awk]

Note, the scripts marked in **red**, indicate a stand-alone script. Scripts marked in **black**, are utility scripts.

Tools Used

In order to limit the dependencies of these shell scripts, all shell scripts (bash) utilize the following (tools natively found in Unix environments) aspects:

- awk,
- grep
- sed,
- cut
- bash (shell script)

The two non-standard tools utilized are:

- SFDX CLI
- Graphviz (dot)

Configuration

Each user is required to add the DX *bin* path to their PATH environment variable. At the time of this writing it is not certain where these scripts will reside. However, for example, if the DX project resides in the following directory (and assuming a git-bash shell installation on Windows),

/c/salesforce/workspaceDXProject. One would add the following to their resource file (either ~/.bashrc or ~/.bash_profile):

```
# add DX Project to path
export PATH="/c/salesforce/workspace/DXProject/bin":$PATH
```

Standalone Shell Scripts

Below are the list of standalone scripts and their respective functionality. All standalone scripts provide general help (-h) and debug (-d).

analyzeOrg.sh

```
Usage: analyzeOrg.sh [ -u <username|target-org> | -l <directory-location-write-data> | -r | -d | -h ]

-u <username>
-l <directory-location-write-data> [defaults to current directory]
-r run the metadata dependencies
-d debug
-h the help
```

This script analyzes a **non ScratchOrg** placing the results into either the current working directory or user specified directory (-I) into a directory named **orgAnalysis**. The script performs the following tasks:

- Counts the Standard and Custom Objects (placing results in user specified directory)
- With the -r option, [md_used.sh] pulls metadata dependency information and [dotGen.sh] creates Graphviz (dot) files and PNG file (for visualized dependencies).

Command-line Arguments

Name	Comments
-u <target-org></target-org>	The target-org name (or alias). This is the Org which you are analyzing. You can get a target-org (or alias) by using the sfdx force:auth command (sfdx force:auth –help for more information)
-l <directory></directory>	The option specifies where to create the directory <i>orgAnalysis</i> . By default, it creates the directory (<i>orgAnalysis</i>) in your current directory. For example, if you specify, -I myCRV, it will create myCRV in your current directory, and then create <i>orgAnalysis</i> , underneath (./myCRV/orgAnalysis)
-r	Run the metadata dependency to gather metrics. This invokes the md_used.sh and dotGen.sh scripts placing metadata dependency information in orgAnalysis/data , and Graphviz files in orgAnalysis/png and orgAnalysis/parsed . The png directory creates SVG files open in your browser (especially, Chrome browsers).
-d	Runs the script using set -xv
-h	Help

General Comments

- The script uses a large package.xml to pull most metadata from the target Org.
- The script **does not create a project** (but has to include *sfdx-project.json* in order to run sfdx cli).
- Uses the converted source in order to gather statistics and create CSV file(s).
- Because there is a large amount of metadata to pull from the target Org, this script will take 10-30 minutes to run (though, the times will vary based on network, system, etc.)
- When the script runs, it will create a directory, **orgAnalysis**, in the user defined location. Results from the analysis are placed there.

Output

The output of this script are as follows (assuming -I orgAnalysis as the current directory) [assuming -r option as well] (analyzeOrg.sh -u wf-dx -I.-r):

```
Starting Analyzes for user: 'wanders'

Running ...

[Step 2] ... Initializing directory for Analyzes ... results will be placed in './orgAnalysis' ...

[Step 3] ... sfdx [Validation] ...

[Step 4] ... scripts 'md_used.sh' and 'dotGen.sh' [Validation] ...

[Step 5] ... Retrieving metadata from Org [pushing to /c/salesforce/workspace/orgAnalysis], please wait ...

Retrieving source...

=== Status

Status: InProgress
jobid: 09S210000001iBWEAY
```

After completion, the above files and directories are created

```
540 wanders:orgAnalysis $
csvSheets/
data/
force-app/
mdapi/
package.xml
packages-installed.txt
parsed/
png/
sfdx-project.json
SObjects-counts.txt
```

Created files and directories

Name	Type	Comments
data/	D	Metadata Dependencies files are placed here
force-app/	D	Common force-app directory to hold converted metadata
csvSheets/	D	All created CSV files
parsed/	D	Data parsed from the metadata (used to assist in debug, if needed)
png/	D	SVG or PNG files and DOT (Graphviz) files
mdapi/	D	Metadata source from Source Org
package.xml	F	Metadata resources to pull from Source Org
sfdx-project.json	F	Used to allow SFDX CLI (if <i>sfdx</i> sees this file it assumes project)
SObjects-counts.txt	F	Custom and Standard Object Count
packages-installed.txt	F	List of packages installed in Source Org
csvSheets/MetadataCounts.txt	F	Holds counts per metadata

Example File Output for SObjects-counts.txt

Number of Standard SObjects: 878 Number of Custom SObjects: 164 Number of ALL SObjects: 1042

Example File Output for packages-installed.txt

Package ID Package Name	Namespace Package Version ID Version Name Version
G6A000000PQwMSAW 0331a000000Luv7AAC MyTa: 16A000000HgA8SAK 033300000000ndAAC Knowle 16A000000PQlzSAG 0333000000wDAbAAM Salesfo 16A000000H5J3SAK 03341000000Q2XAAU Salesfo 16A000000HbEUSAO 0334B000000D21UQAW ACT 16A000000Hg9ySAC 0338000000AqsRAAS Financia 16A000000Hg9tSAC 0338000000FSQMAA4 Financia 16A000000Hg9oSAC 03380000000U1CPAAO Financia	## dedge Base Dashboards & Reports SK

Force-app and mdapi Directory

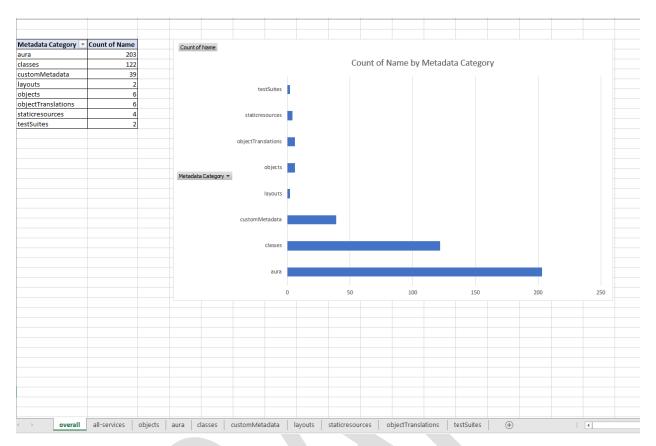
These directories are created to pull statistics and cull information for analysis. These directories can be deleted if necessary.

CsvSheets Directory

This directory holds the CSV files created from the Force-app directory. There is a main CSV file, *allCRVmetadata.csv*, which holds all the metadata. Each Metadata Category, i.e. *applications*, *appMenus*, etc. is created in a separate CSV file. You can bring these separate CVS files into the *allCRVmetadata.csv* individually or via a script.

Name	Metadata Category	Development Team	Package
Card_Services.app-meta.xml	applications	TBD	Happy Soup
ContactUs.app-meta.xml	applications	TBD	Happy Soup
Gateway_Reporting.app-meta.xml	applications	TBD	Happy Soup
MAAEMMA.app-meta.xml	applications	TBD	Happy Soup
standardAllTabSet.app-meta.xml	applications	TBD	Happy Soup
standardAppLauncher.app-meta.xml	applications	TBD	Happy Soup
standardChatter.app-meta.xml	applications	TBD	Happy Soup
standardCommunity.app-meta.xml	applications	TBD	Happy Soup
standardContent.app-meta.xml	applications	TBD	Happy Soup
standardInsights.app-meta.xml	applications	TBD	Happy Soup
standardInsuranceConsole.app-meta.xml	applications	TBD	Happy Soup
standard_LightningSales.app-meta.xml	applications	TBD	Happy Soup
standardLightningSalesConsole.app-meta.xml	applications	TBD	Happy Soup
standardLightningScheduler.app-meta.xml	applications	TBD	Happy Soup
standardLightningService.app-meta.xml	applications	TBD	Happy Soup
standardMarketing.app-meta.xml	applications	TBD	Happy Soup
standardPlatform.app-meta.xml	applications	TBD	Happy Soup
standardSales.app-meta.xml	applications	TBD	Happy Soup
standard SalesforceCMS.app-meta.xml	applications	TBD	Happy Soup
standardService.app-meta.xml	applications	TBD	Happy Soup
standardServiceConsole.app-meta.xml	applications	TBD	Happy Soup
Store_Vision_Platform.app-meta.xml	applications	TBD	Happy Soup
TLS1_0_Warning.app-meta.xml	applications	TBD	Happy Soup
WellsFargoCRV.app-meta.xml	applications	TBD	Happy Soup
WellsFargoCRVAdmin.app-meta.xml	applications	TBD	Happy Soup
WF_CRV_20_CONSOLE.app-meta.xml	applications	TBD	Happy Soup
WF_CRV_FSC.app-meta.xml	applications	TBD	Happy Soup
AppSwitcher.appMenu-meta.xml	appMenus	TBD	Happy Soup
Salesforce1.appMenu-meta.xml	appMenus	TBD	Happy Soup
Account.Book Reassignment Contact Center.approvalProcess-meta.xml	approvalProcesses	TBD	Happy Soup

As another example, looking at services group, it was possible to bring in the related CSV files and gain further analysis.



Finally, this directory contains a file, *MetadataCounts.txt*, which holds the number of metadata components.

```
2 : dataSources
   2 : assignmentRules
  27 : applications
  96 : settings
 101 : topicsForObjects
   1 : lightningExperienceThemes
   1 : weblinks
   4 : installedPackages
   1 : samlssoconfigs
   2 : autoResponseRules
  59 : permissionsets
   3 : cachePartitions
   3 : testSuites
   4 : roles
  19 : customPermissions
  54 : quickActions
   3 : cleanDataServices
  30 : flows
   1 : customHelpMenuSections
   8 : 1wc
   1 : pathAssistants
   2 : brandingSets
  10 : reportTypes
   9 : workflows
  62 : tabs
1944 : objectTranslations
   2 : queues
1356 : objects
   4 : matchingRules
5675 : staticresources
   1 : datacategorygroups
   1 : notificationTypeConfig
1306 : classes
   1 : labels
  27 : profileSessionSettings
   7 : globalValueSets
1073 : aura
   6 : duplicateRules
  82 : pages
   2 : appMenus
```

Figure 1MetadataCounts.txt

Data Directory

This directory holds metadata dependencies. These files are used to map the dependencies of related components and used to provide a visualization (Graphviz). The data can be further analyzed after the script is done. This information utilizes the SFDX guery mechanism as outlined by Andy Fawcett, here.

Parsed Directory

This directory holds parsing information and used to allow for debugging, if needed.

PNG Directory

This directory contains all the converted dot files into SVG. The dot files (i.e. *apex_dot.dot*) are left in for further manipulation (as you can also generate PNG files, PDF, files etc.).

SVG files are easier to work with as you can show the visualization via a browser (i.e. Chrome). For example, a partial display of visual-force SVG file (within a Chrome Browser):

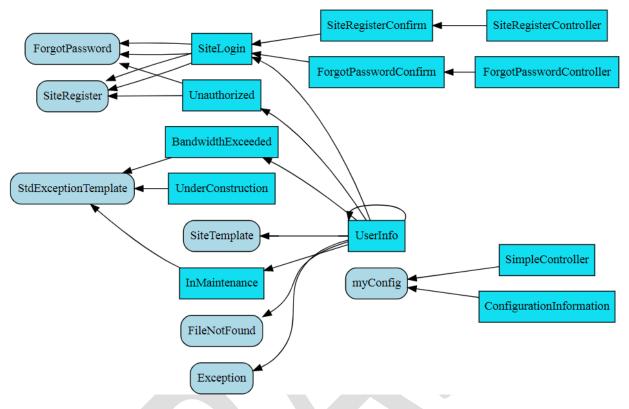


Figure 2 Partial Display of Static Resource SVG

When to Use?

Use this script to get an overview of a Source Org. The spreadsheets and visualization will help assist in breaking the metadata into appropriate areas of the Capability Squads.

buildScratchOrg.sh

```
Usage: buildScratchOrg.sh [ -u <source|username> | -s <scratch-org-user>| -f | -d | -h ]
-s <scratch-org-user>
-u <source|username> [Source of a NON-Scratch-Org, if any]
-f [ensures the FSC package is installed]
-d debug
-h the help
```

This script builds a scratch org based on installed source Org. A Scratch Org can contain many features and required packages (i.e. FSC). Instead of guessing how and what to do, this script builds a scratch org for the user. At the time of this writing, *data is NOT loaded into the Scratch Org – TBD*.

The script takes a scratch-org user (-s <test*>), if known, otherwise, it creates a scratch org and applies the features and installs required packages into the scratch Org.

Command-line Arguments

Name	Comments
-s <test*></test*>	If an scratch org has already been created, you can pass that user-id (test-flfhb460d6df@example.com) and it will install into that scratch org. However, any features not enabled may cause a conflict. The scratch Org will expire after 2 days.
-u <source-org></source-org>	If there is a source Org (non-scratch Org) which contains installed packages you want in your scratch Org; include it via the -u option. The script will read all the installed packages are attempt to replicate in your scratch org. Note, it ignores the package ID for the Financial Service Cloud to used ensure you are using the latest.
-f	Ensures the latest Financial Service Cloud (FSC) package is installed. You would ONLY need this flag if: 1) Your source org did not contain the FSC package, or 2) The common install package file did not include the FSC package name
-d	Runs the script using set -xv
-h	Help

General Comments

• The script pulls from a list of packages names (res/installPackages.txt). Note, there has to be an empty (new-line) at the end of this file. If the package id is known (04t*) it would appear first (followed by semi-colon [:]). If there is a source org specified, the script will use the org as a reference and determine the package id, if not present. For example, the installPackage.txt (below) does not specify the Financial Services Cloud, as it pulls the latest.

04t3000000bqOuAAI:Knowledge Base Dashboards & Reports
04t4B000000Dxh1QAC:ACT
04t30000001DUvrAAG:Salesforce Connected Apps
04t410000009jsfAAA:Salesforce Adoption Dashboards
:Financial Services Cloud
:Financial Services Ext

- The script will check for the latest version of FSC (Financial Services Cloud) and install it. This is
 done because an FSC extension or feature may be deprecated. Thus, does not depend on the
 package id of the non-Scratch Org.
- The script does not require a VS Code Project Folder nor sfdx-project.json file as is the case for many of the SFDX CLI commands.
- The script uses a non-scratch org instance (if included -u <source-org>) to determine what packages to be included. It uses the SFDX command (force:package:installed:list) along with the file, installPackages.txt, to determine what packages are required
- Depending on the number of packages to install, the script may take well over 20 minutes to install. For example, the list found in the example above, the installation took ~20 minutes.

When to Use?

Use this script to initialize a Scratch Org for development. Some development teams require features and packages to be installed in order to test and validate. For example, many financial companies use Financial Service Cloud (FSC) which must be installed before installing dependent components.

createProject.sh

```
Usage: createProject.sh [ -u <username> | -d <project> | -p <unmanaged-package-name> | -l <root-directory-of-project> | -o | -t | -v | -h ]

-u <username>
-d <project> which contains the unmanaged package
-p <unmanage-package-name> Unmanaged Package information ( this had to have been done FIRST!)
-l <root-directory-of-project> The root directory location; location to place project (i.e. <root-directory-of-project>/myproject)
-o overwrite project (if it exists)
-t run unit tests in scratch Org
-v turn on debug
-h the help
```

This script will build a VS Code Project. It provides the ability to bring down an unmanaged package as a starting point. However, if there is no pre-defined package just enter return when prompted.

Command-line Arguments

Name	Comments
-u <source-org></source-org>	The source Org (non-scratch Org) which contains the unmanaged package, if any. This Org is the non-scratch Org you VS Code project will authenticate/attach to.
-d <project></project>	The project name which will contain your Visual Studio Code project.
-p <unmanaged-package-name></unmanaged-package-name>	If a unmanaged package was created in the Source Org the script pulls down the package into your Visual Studio Code project
-l <root-directory></root-directory>	Root directory location for the Visual Studio Code project and related information
-0	Overwrite information in the project directory
-t	Run Unit Tests when the metadata is pulled down.
-v	Runs the script using set -xv
-h	Help

When to Use?

Use this script to initialize a Visual Studio Code project from a unmanaged package in a non-scratch Org.

dotGen.sh

```
Usage: dotGen.sh [ -u <username> | -t <filter-type> | -x <data-location> | -a | -c | -d | -f | -g | -i | -l | -o | -r | -s | -v | -z | -h ]

-u <username>
-t <filter-type> , where '<filter-type>' is 's' for service, 'g' for growth, 'c' for core
-x <data-location>
-a Apex
-c custom object
-d debug
-f flows
-g global set values
-i custom fields
-l lightning/lwc/aura
-o orchestration
-r static resource
-s custom settings
-v visual force
-z [run ALL]
-h the help
```

This script parses the metadata dependency files (generated by **md_used.sh**, and called from **analyzeOrg.sh**) to generate a visual dependency SVG graph (from a dot file). This script will be used to support filtering of metadata (i.e. search for Services related metadata, **CR_** prefix). The SVG files are placed in data location (-**x** < **directory>**).

This script will create two directories:

- png holds the SVG files and DOT related file
- parsed holds the parsed data used to generate the DOT file

This script will read from a data directory (either in the current directory or the -x < root-dir>).

It is expected that either **md_used.sh** or **analyzeOrg.sh** are run prior to this script. Why? The script looks for the metadata dependency information in the **data** directory. For example, if you run this command from your current directory, and there is a ./**data** directory (i.e. ./data) which contains information previously created by either **md_used.sh** or **analyzeOrg.sh**.

Command-line Arguments

Name	Comments
-u <source-org></source-org>	The source Org (non-scratch Org) which contains the Org
	you want to run analysis on.
-t [c s]	Filters the data pulled from the Org. At the time of this
	writing it supports :
	• c for Core components
	s for Service components
-x <root-directory></root-directory>	The root directory where it will find the metadata
	dependency information directory, data . For example, if
	you run the script from a directory (/c/myHome), it will
	look for /c/myHome/data to hold the metadata
	dependency information. [-x/c/myHome].
-a	Process Apex related data (generate SVG files placed in
	png directory). Parsed data from the metadata files are
	placed in parsed directory.
-с	Process Objects related data (generate SVG files placed in
	png directory). Parsed data from the metadata files are
_	placed in parsed directory.
-g	Process Global Set Values related data (generate SVG files
	placed in png directory). Parsed data from the metadata files are placed in parsed directory.
-i	Process Custom Fields related data (generate SVG files
•	placed in png directory). Parsed data from the metadata
	files are placed in parsed directory.
-1	Process Lightning related data (generate SVG files placed
	in png directory). Parsed data from the metadata files are
	placed in parsed directory.
-0	Process orchestration related data (generate SVG files
	placed in png directory). Parsed data from the metadata
	files are placed in parsed directory.

Name	Comments
-r	Process Static Resources related data (generate SVG files placed in png directory). Parsed data from the metadata files are placed in parsed directory.
-S	Process Custom Settings related data (generate SVG files placed in png directory). Parsed data from the metadata files are placed in parsed directory.
-v	Process VisualForce related data (generate SVG files placed in png directory). Parsed data from the metadata files are placed in parsed directory.
-z	Process ALL metadata information
-d	Runs the script using set -xv
-h	Help

General Comments

• The script uses Graphviz (dot) to generate SVG files. Note, from a dot file (i.e. apex.dot) you can also generate other output (PNG, PDF, etc.). More information of what you can do with DOT files can be found here.

```
# To generate a SVG file from a dot file (i.e. apex.dot)

• dot -Tsvg -o apex.svg apex.dot

# To generate a PNG file from a dot file (i.e. apex.dot)

• dot -Tpng -o apex.png apex.dot
```

- The script reads generated metadata dependencies (see **md_used.sh** script) found in **data** directory.
- The script visual output can be modified as needed. One could got to the **png** directory and change the data in the dot file (i.e. *apex.dot*).

When to Use?

Use this script when you want to create graph dependency visualizations from metadata dependency files from a Salesforce Org. Note, it looks for specific names to know how to process. Use this script after you ran **md_used.sh** or invoked via **analyzeOrg**.sh

md_used.sh

```
Usage: md_used.sh [ -u <username|target-org> | -l <data-location> | -d | -h ]
-u <username|target-org>
-l <data-location> [will create, if not present]
-d debug
-h the help
```

This script pulls the metadata dependency information from the specified Org. By default, the script with create a data directory (data) in the current working directory (./data).

For example, (assuming I have already authenticated to the an Org with an alias of **wf-dx** and my current working directory is **/c/salesforce/workspace**:

```
371 wanders:workspace $ md_used.sh -u wf-dx
      [Step 0] ... SFDX [Validation] ...
      >>>>'sfdx' command found...<
      [Step 1] ... Initializing directory for Analyzes ... results will be placed in '/c/salesforce/workspace/data' ...
      >>>>Gathering Metdadata [may take a while]...
      >>>>> Gathering Apex Classes...<
      >>>>> Gathering Custom Labels...<
      >>>>> Gathering Lightning Components...<
      >>>>> Gathering Static Resources...<
      >>>>> Gathering Visual Force Pages...<
      >>>>> Gathering Custom Settings...<
      >>>>> Gathering Flows...<
      >>>>> Gathering Custom Fields...<
      >>>>> Gathering Custom Objects...
      >>>>> Gathering Global Value Sets...<
      >>>>> Gathering Orchestration Context...<
      >>>>> Gathering Reports...<
      >>>>> Gathering Report Types...<
```

After the script finishes, there will be a number of files (.txt) placed in ./data directory, as shown below:

```
3376 wanders:data $ pwd
/c/salesforce/workspace/data
3377 wanders:data $ ls -1
apex_classess.txt
custom_fields.txt
custom_label.txt
custom_objects.txt
flows_used.txt
global_value_sets.txt
lightning_comp.txt
orchestration_used.txt
report_types.txt
reports.txt
static_res.txt
vf_pages.txt
```

The script, **dotGen.sh**, will read this information and create a dependency graph.

When to Use?

Use this script to generate metadata dependency files of a Salesforce Org. Note, it generates specific files that **dotGen.sh** looks for.

sfdxUrlEncrpt.sh

This script encrypts/decrypts the **sfdx** stored-url (ascii file). The data contained in this file allows a tokenized access to an Org.

When to Use?

Use this script to generate a protected/encrypted stored-url file.

Appendix: Comments

Below are some general comments:

- The scripts will evolve over time. For example, **md_used.sh** will be updated to pull more metadata.
- The script **dotGen.sh** does not create a dependency graph for ALL metadata. This is a work in progress [WIP]
- SFDX CLI is evolving and some scripts may need to be adjusted
- The scripts could be refactored; placing commonly functionality into a separately source shell script.

