Automation org setup

# Commission new org

If you are creating a new org the instructions for this can be found in the assembla wiki. Otherwise you can skip this step.

# Login and session security

Make sure your login and session security settings are loose enough to accommodate automatically login in from cloudbees or the like without getting verification emails etc.

Navigate to ‘Profiles > System Administrator > Login IP Ranges’ and set the range to 0.0.0.0 – 255.255.255.255

Navigate to ‘Security Controls > Session Settings’. Check the Disable session timeout warning popup, deselect ‘Lock sessions to the IP address from which they originated’ and at the bottom of the page set the only High Assurance to Username Password

Navigate to ‘Security Cotrols > Password Policies’. Set the passwords to never expire and set maximum invalid login attempts to ‘No Limit’

# Perform a config copy

Go into the org that you want to copy and navigate to the page apex/configurationdatamanagement and create a new configuration data export !Remember to include All Resources!

Save the export file to a place where you can find it from.

Go into the org that you want to copy to and navigate to apex/datacleardown. Copy the org name into the confirmation field and run all the clear down jobs.

Navigate to apex/configurationdatamanagement and create a new configuration data import and give it a name. Attach the export file from the previous org to the import. When you’re done click import.

When the ConfigurationDataImport page has finished all analysis, delete all the configuration data – remember to check the allow delete of all configuration data checkbox.

* You might have a problem clearing out some data - in this case
  + Go to setup > search for ‘user interface’ and click > select Enable Custom Object Truncate and save
  + Now you can manually truncate all the tables that ConfigurationDataImport is unable to clear out

When the page has finished deleting all configuration data you can import the configuration data you extracted from the first org.

* You might have problems importing some objects due to missing field definitions, or other discrepancies, in the target org – in this case
  + Fix the discrepancies by looking at the first org and copying over all the needed definitions in to the target org

When the import has completed : There are two scripts in the automation svn repository at:

* src\test\scripts\LoadAutomation\_UKPublicHolidays.txt
* src\test\scripts\LoadAutomation\_USPublicHolidays.txt

Run these in execute anonymous in the dev console

Navigate to apex/referencedataload and extend the time periods starting from 01/01/2013 and extend by 48 months if it’s currently 2016 or 60 months if it’s 2017 etc..

When all the time periods have been extended navigate back to apex/datacleardown and reset the resource schedule information and after that has completed navigate to run all the created jobs via the link which appeared.

# Manual setup

In setup go and customize the account layout assignments. Clone the Kimble Account Layout and add the ‘is supplier’ field to it. Then set the System Administrator assignment to cloned layout.

Add two new users to the org with standard salesforce licenses. Make sure the other user is a System Administrator, doesn’t have a forename and has the surname: ‘UK Co 1 x'x x&x Employee One’. Disable triggers in the org and navigate to the tab Resources. Make sure the page displays 50 or more results when you click go! (at the bottom of the resource list). Set the org admin user (the user you’re logged in as) as the user for resource ‘[US Co 1 x'x x&x Employee Four](https://eu5.salesforce.com/a3N24000000HRVx)’. Then set the resource ‘UK Co 1 x'x x&x Employee One’ to user ‘UK Co 1 x'x x&x Employee One’. And then set all other resources of type Associate or Employee to the second new user you created. Now remember to !Enable triggers!

Navigate to ‘Setup’ > ‘Custom Labels’ and add an English translation with the value ‘true’ to the label ‘ConfigurationSetting7’

Navigate to ‘Setup’ > ‘Workflow & Approvals’ > ‘Workflow Rules’ and deactivate the workflow rules: ‘TimesheetApproved’ and ‘ExpenseClaimApproved’

# Packaged org considerations

Go into ‘Setup > Develop > Custom Settings’ and click on ‘Operational (Setting)’ then ‘Manage’ and ‘New’. Make sure only the ‘**Recognise Expenses On Incurred Date**’ checkbox is ticked and press ‘Save’. Make the license for the org active and stop it from expiring by logging into K4K and logging into the Customer Organisation called ‘Kimble - Customer Organisation Management (SuppDev)’. Navigate to the tab Licenses and edit the view ‘ById’ replace the id in the filter with the org id of the org you installed the package into. Save the changes and when the license appears in the listview click on the license name and then click ‘Modify License’. Select ‘Does not Expire’, set the Status to ‘Active’ and click ‘Save’