AGILELIGHTFORMS DEPLOYMENT GUIDE

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AgileLightForms Deployment Guide

1. Introduction

It is very common having to move forms from one environment to other. Apart from moving the forms, some adjustments could be needed due to servers having different URLs in each environment.

Follow the steps in this guide to learn to use ApFormsMover to migrate forms between environments.

ApFormsMover is a wizard-like tool that can be used to move AgileLightForms from a CRM Organization or a disk file to another CRM Organization or disk file.

ApFormsMover can also be used to automate recurring migrations, such as moving AgileLightForms from Development environment to Production environment.

1.1   Disclaimer of warranty

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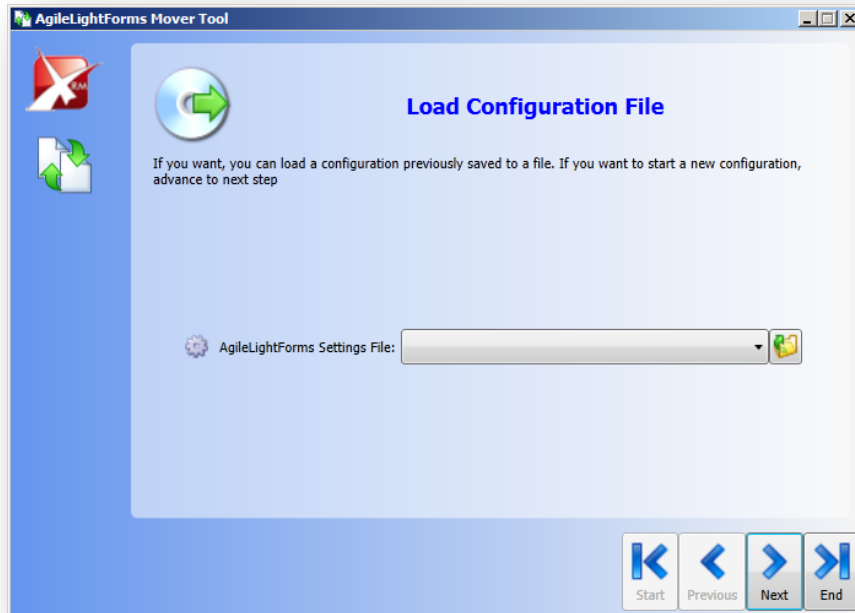
2. Exporting AgileLightForms from a CRM Organization to a file

When you open AgileLightForms Mover Tool, the first screen allows you to load a previously saved configuration file to reuse the settings you used when you saved this configuration file.


Next screen allows you to select the source for the AgileLightForms to be moved. You can choose to move forms from either a **CRM Organization** or a previously saved **AgileLightForms Collection file**. In this case, we will select CRM Organization.
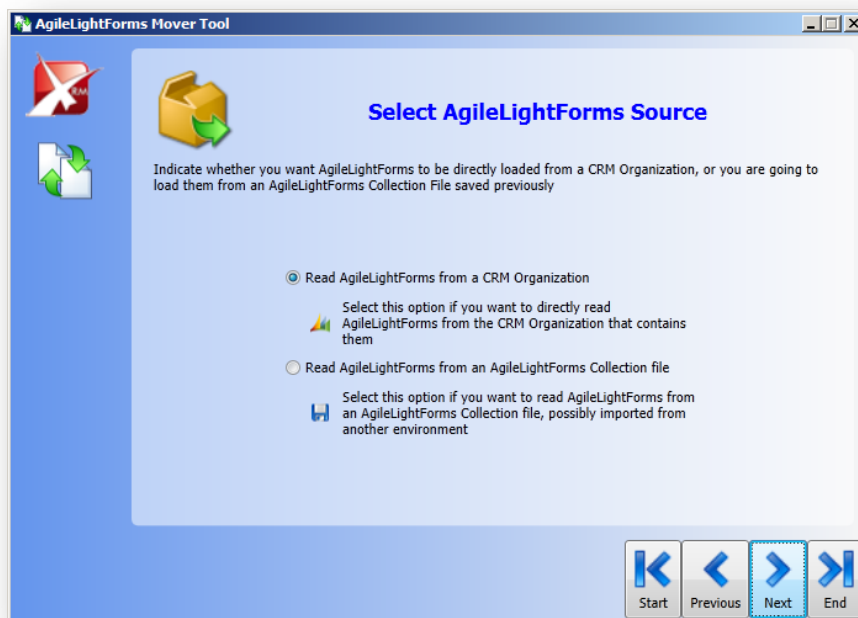
If we specified that forms are stored in a CRM Organization, the next screen asks for the **CRM Server URL**. If you have previously connected to that server, just select it in the **CRM Connection** drop-down list. If the server is not in the drop-down list, type the server address in the **CRM Server Url** textbox. If you want AgileLightForms Mover Tool to connect to that server using the credentials of the currently logged-on user, do not check the **Credentials** check-box. If you want to use a different CRM user, check the **Credentials** check-box. Three text boxes will appear, allowing you to specify the **Domain name, User name, and password** to use to connect to CRM Server.
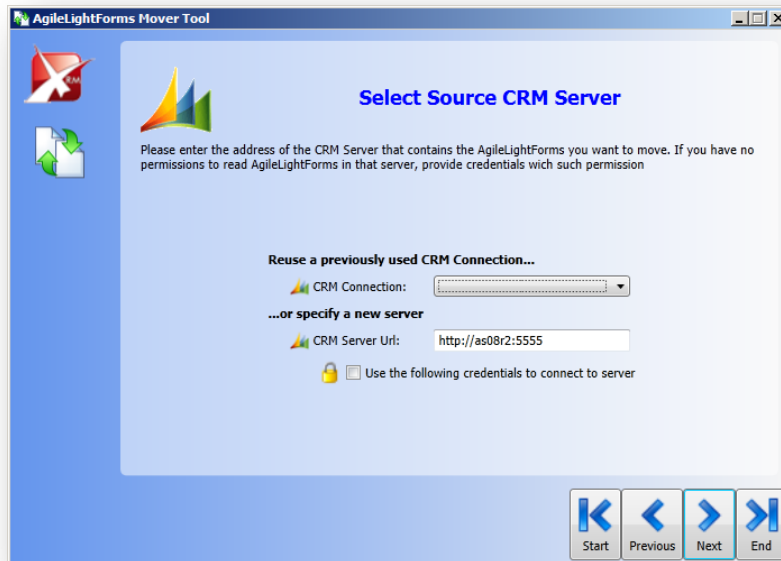

AgileLightForms Mover will connect to the specified server, with the provided credentials, to enumerate the CRM Organizations it contains. In the next screen, you will be able to select one of the organizations in the specified CRM Server.
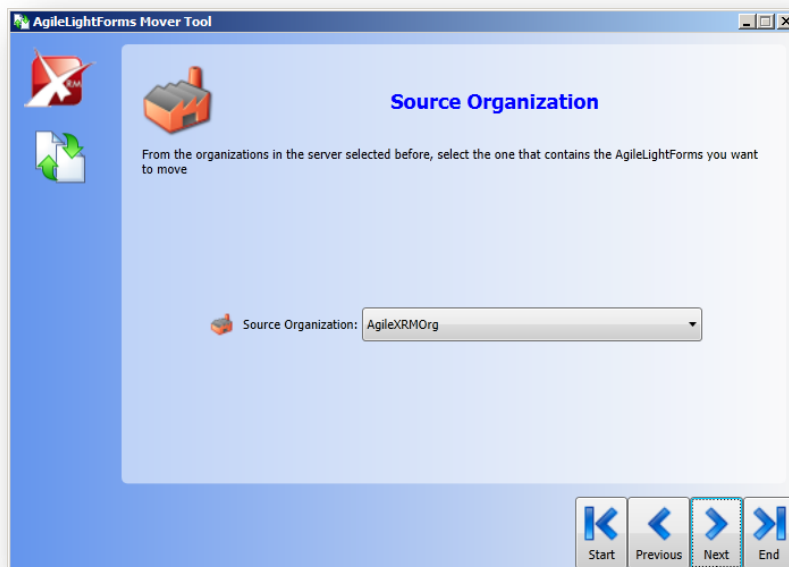
The next screen will allow you to filter the forms to move based on their **Categories**. If you want to move all forms in the selected organization, select **All Categories**. The other two options allow you to select the categories to include or exclude, respectively.
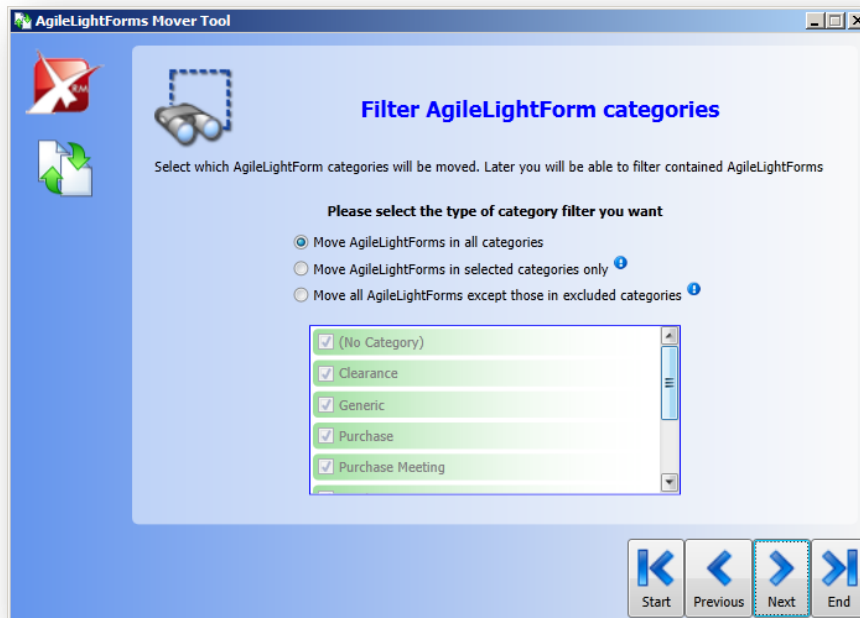

The following screen allows you to further filter the forms to move, in this case individually. If you want to move all forms in the selected categories, select **All Forms**.
The other two options allow you to select the AgileLightForms to include or exclude, respectively.
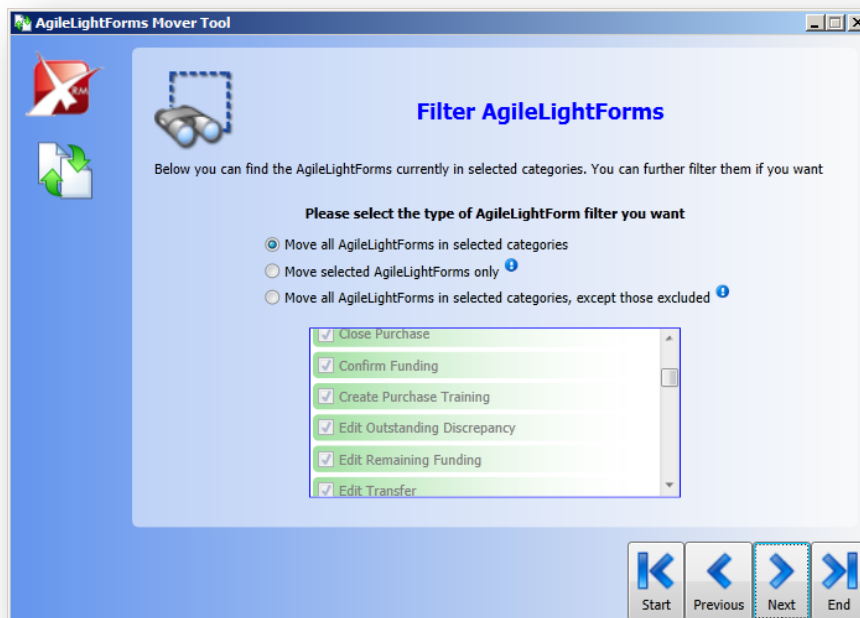
After you have selected the Forms to move, you must select whether you want to move them to another **CRM Organization**, or to an **AgileLightForms Collection file** (.alfc). If you select a file, you can move that file to the target environment to import them to an organization that is accessible there.
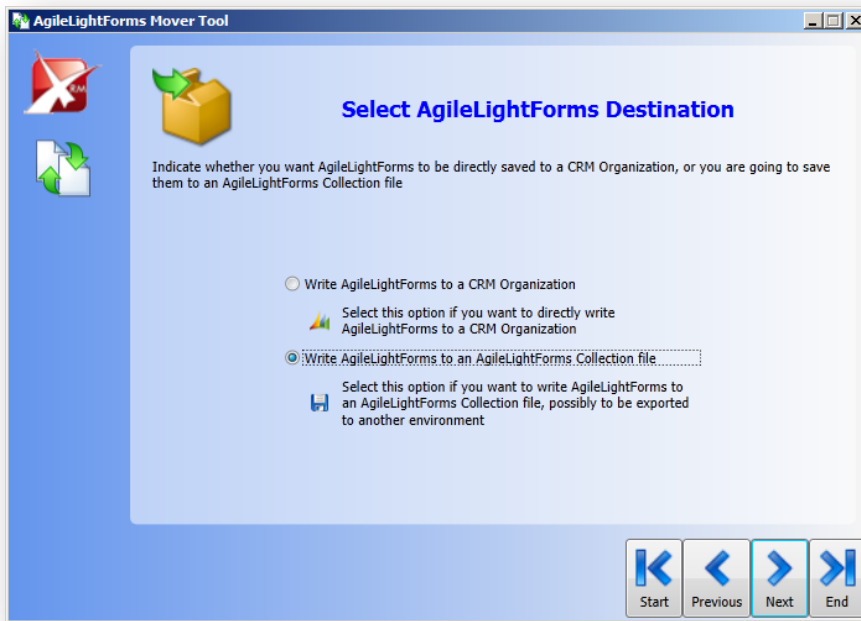
Because we have selected to move the forms to a collection file, the next screen allows you to specify the files to move the forms to. Just browse for its location.
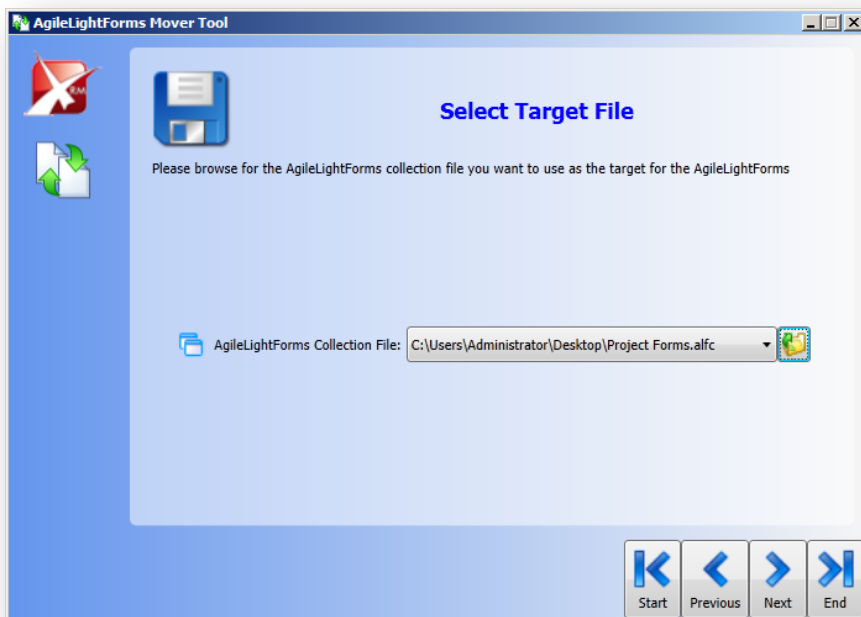
After this step, the collection file will be created and the forms will be stored inside it. The last screen allows you to save the settings you have used in an AgileLightForms Settings File. You can later reuse this file to repeat the same migration procedure.
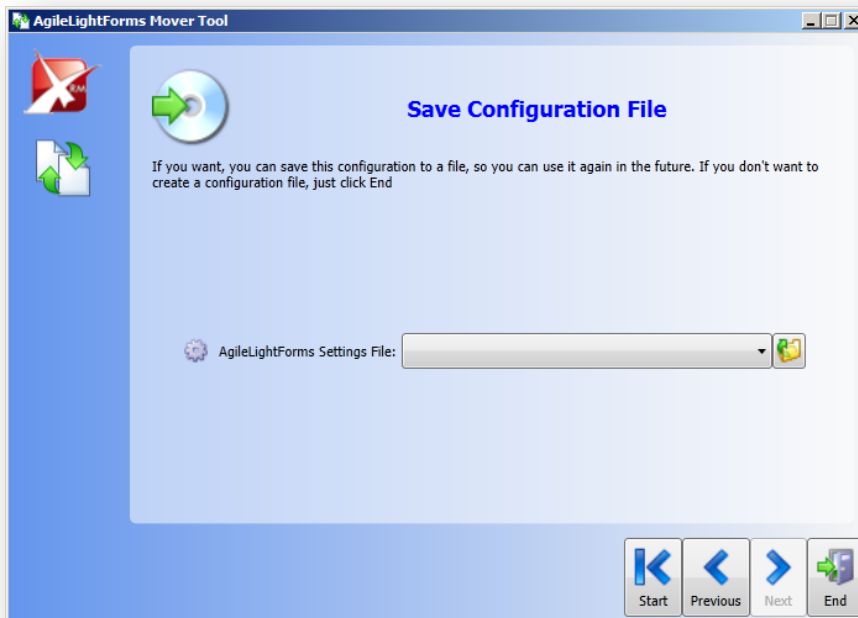
3. Importing AgileLightForms from a file to a CRM Organization

To perform the import, just change the Source and Target in the wizard screens. The screens will be adjusted to ask for a source file name and a target CRM server and organization.

When you move AgileLightForms to a CRM Organization, server names in the forms will be adapted to the ones in the target environment. Only CRM and AgilePoint server URLs pointing to the default CRM and AgilePoint servers in the source environment will be translated to the default CRM and AgilePoint servers in the target environment.

If your forms contain CRM or AgilePoint server URLs other than the default in the source environment, you will have to manually translate the URLs by editing the AgileLightForms collection file. This is an XML file you can edit with any text editor. You can also double-click the AgileLightForms Collection file to make the wizard automatically open the file and take you directly to the filter screens.

4. Automating the Migration Process

To automate a migration process, just complete the wizard using the desired settings, and save these settings in an AgileLightForms Settings File. You can later open this file in the first screen of the wizard, or just double-click the file to complete the process without user interaction. You can also call the tool from a command-line shell, batch file, or script, providing the route to the settings file.