

iHub - Sandbox refresh

During the Sandbox refresh process, all existing Clarizen Sandbox information relating to iHub is deleted and copied over by that from the Production environment.

The following information is overridden by the refresh process:

- ✔ **Linked accounts (Clarizen-SFDC/JIRA/Intacct)**
- ✔ **Mappings**
- ✔ **Events**
- ✔ **Synced objects information**
- ✔ **Settings**

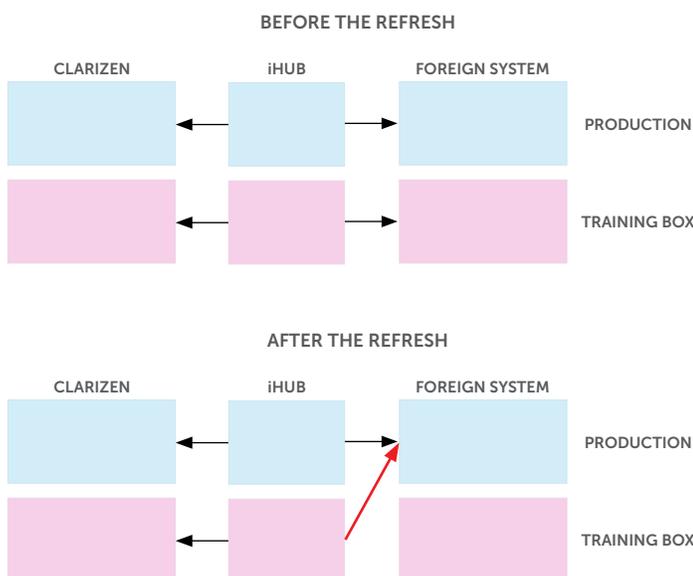
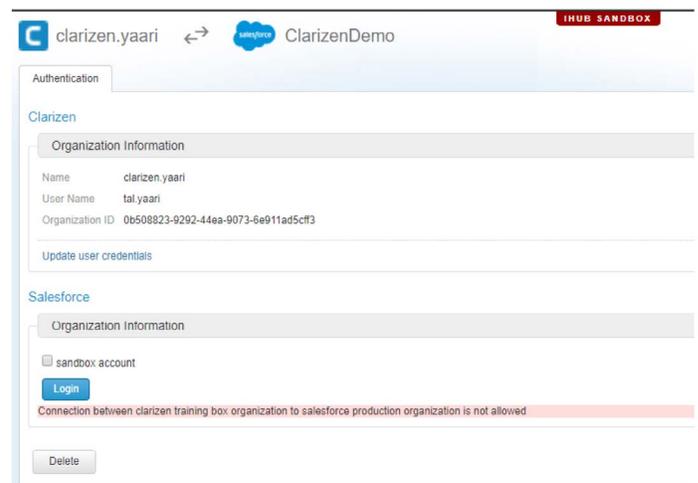
After Refresh, as Sandbox now reflects the Production settings, Sandbox iHub's "foreign system" (e.g. Salesforce, Jira, etc.) now points to Production account.

ACTION REQUIRED

After each refresh, Administrators should re-connect their Clarizen Sandbox Account to match the foreign system account.

iHub Integrations are disabled during the Refresh process to prevent a situation in which Sandbox data could be unintentionally synced to a Production account.

For a secondary level of protection when using Clarizen-Salesforce integration, Clarizen Sandbox is blocked from connecting to Salesforce Production servers:



Mappings and events

You may be building a new integration process in Sandbox which you are not ready to deploy on Production, but don't want to have overwritten.

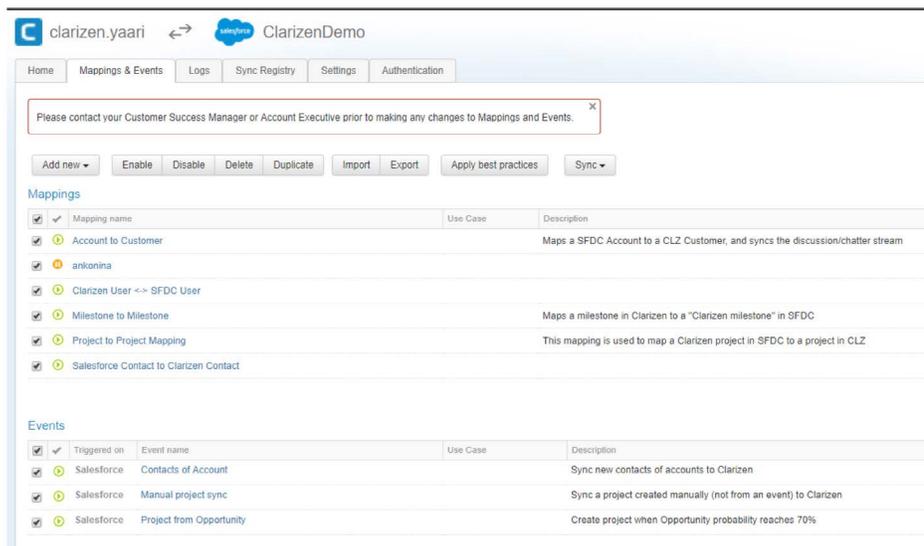
If your Sandbox settings differ from those in Production, and needs to be backed up before and restored after Sandbox Refresh, follow the instructions below.

Backing up & restoring mappings & events

To be able to restore the iHub configuration back to the point prior to the refresh, follow the following steps:

BEFORE REFRESH

1. Log in to your Clarizen Sandbox account
2. Go to: <https://app.clarizentb.com/Clarizen/Pages/Admin/AdminIntegrations.aspx>
3. Choose the open relevant integration (SFDC, Jira, Intacct)
4. Choose "Mappings & Events" tab
5. Mark all mappings and events and press the Export button
6. A JSON file will be created and downloaded to your local machine
7. Important Note: the Sandbox Refresh process does not delete or modify the foreign system triggers (Jira's Webhooks / SFDC Workflow Rules / Intacct smartrules) and they remain unaffected by iHub, but still will be triggered by foreign side. So, select all Events and press the Delete button.



clarizen.yaari ←→ Salesforce ClarizenDemo

Home Mappings & Events Logs Sync Registry Settings Authentication

Please contact your Customer Success Manager or Account Executive prior to making any changes to Mappings and Events.

Add new Enable Disable Delete Duplicate Import Export Apply best practices Sync

Mappings

Mapping name	Use Case	Description
Account to Customer	Maps a SFDC Account to a CLZ Customer, and syncs the discussion/chatter stream	
ankonina		
Clarizen User ↔ SFDC User		
Milestone to Milestone	Maps a milestone in Clarizen to a "Clarizen milestone" in SFDC	
Project to Project Mapping	This mapping is used to map a Clarizen project in SFDC to a project in CLZ	
Salesforce Contact to Clarizen Contact		

Events

Triggered on	Event name	Use Case	Description
Salesforce	Contacts of Account		Sync new contacts of accounts to Clarizen
Salesforce	Manual project sync		Sync a project created manually (not from an event) to Clarizen
Salesforce	Project from Opportunity		Create project when Opportunity probability reaches 70%

AFTER REFRESH

1. Log in to your Clarizen Sandbox account
2. Go to: <https://app.clarizentb.com/Clarizen/Pages/Admin/AdminIntegrations.aspx>
3. Select the "Authentication" tab
4. Press the Delete button (will clear the Sync Registry information).
5. Connect the Clarizen account to the desired foreign system account
6. Select the "Mappings & Events" tab
7. [Optional] If not needed, delete all out of the box mapping and events
8. Press Import button and choose the JSON file that you exported before the refresh

Notes:

1. Refresh process will keep the SyncRegistry as it was in Production. This means that the foreign side of SyncRegistry holds production data, which cannot and should not be in used in Sandbox. SyncRegistry data will be deleted once you delete the integration.
2. If your Mappings reference custom fields on the foreign system which exist in Production systems but not in Sandbox, your mapping will no longer work properly.
3. Since JIRA has no Sandbox environments, iHub can't detect and prevent Sandbox from reaching JIRA Production automatically. It means that Clarizen Sandbox can sync with JIRA Production systems. Enabling the integration can cause unexpected and undesired results. It is highly recommended to avoid this scenario.

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