Colligo - Integrate Azure Boards with Salesforce

Installation & Configuration Manual

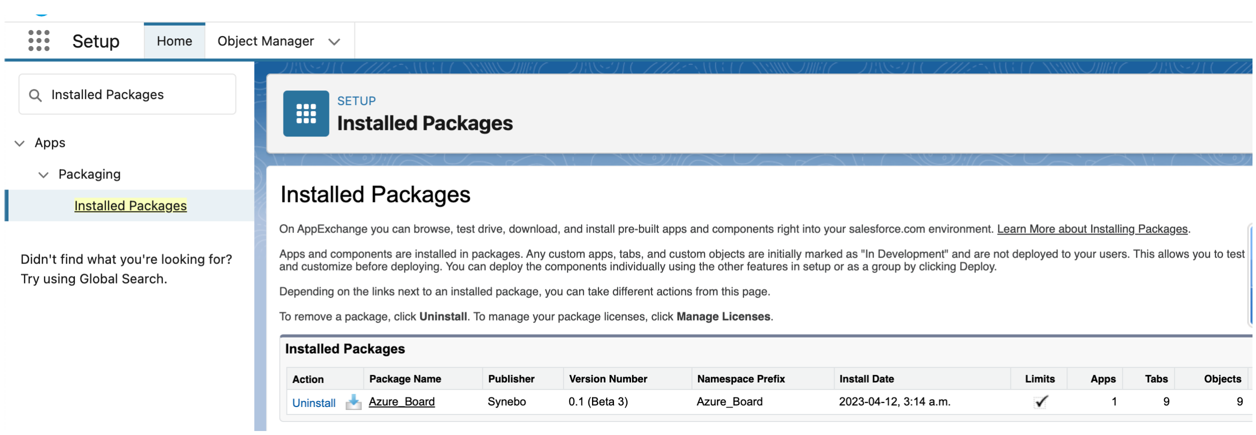
INSTALLATION

In Salesforce, users can install the latest package/App in a Salesforce instance.

Perform the following steps:

1. Open a browser and enter the installation URL. The Salesforce Login page opens.
2. Enter your credentials and click Login.
3. Select Admin/Users/Profiles as per the requirement.
4. Click Done.

The installed app can be found in Setup → Installed Packages.



Notes:

- Install for Admin Only: When selecting this option it is necessary to set the appropriate user and object permissions on the custom profiles. This is relevant for the Enterprise, Performance, Unlimited or Developer editions. This setting must be done manually.
- Install for All Users: Use this option if the Colligo Package is available to all users.
- Install for Specific Profiles: Use this option for profiles which are already defined where the use of Colligo Package is limited to these profiles.

To install the Colligo Package, select the Install for All Users option.

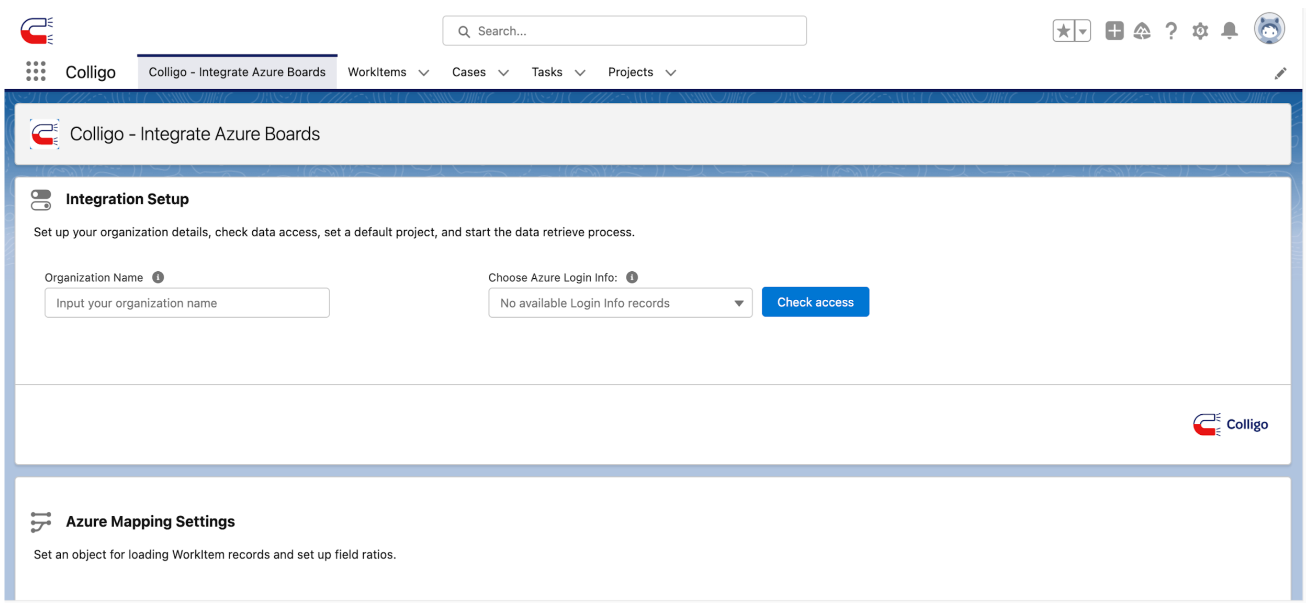
Note: If Install for Admins Only is selected, Colligo Package will work for users with System Administrator profile only. Any other profile will require manual configuration as described in this article.

COLLIGO - GETTING STARTED

Colligo contains an "Colligo - Integrate Azure Boards" Tab, which contains the components for all the necessary configuration of the package.

Each component contains instructions and help text in order to simplify the setup process.

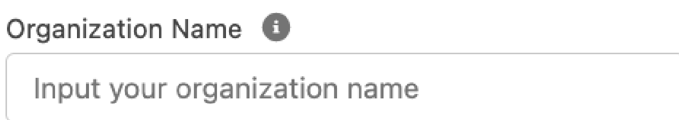
1. Go to App Launcher and search for Colligo. The "Colligo - Integrate Azure Boards" Tab appears.



Integration Setup Component

Set up your organization details, check data access, set a default project, and start the data retrieve process.

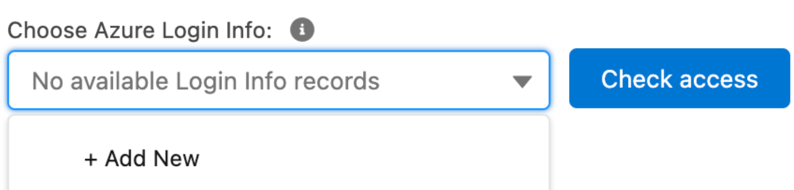
1. User needs to enter the name of the Organization. An Organization name must exactly match the name of your organization in Azur.



2. Choose Azure Login Info. To access Azure Organization, user need to create an Azure Login Info record using Personal Access Token. To get Personal Access Token, follow the instructions from the "Create a PAT" section by clicking on the following link:

Use personal access tokens - Azure DevOps

3. When a user has received a Personal Access Token, return to the Integration Setup Component and by clicking on the input field select the "+ Add New" option.



After clicking on the "+ Add New" option you will see a pop-up window with a form to create your Azure Login Info record.

Fill in the following fields:

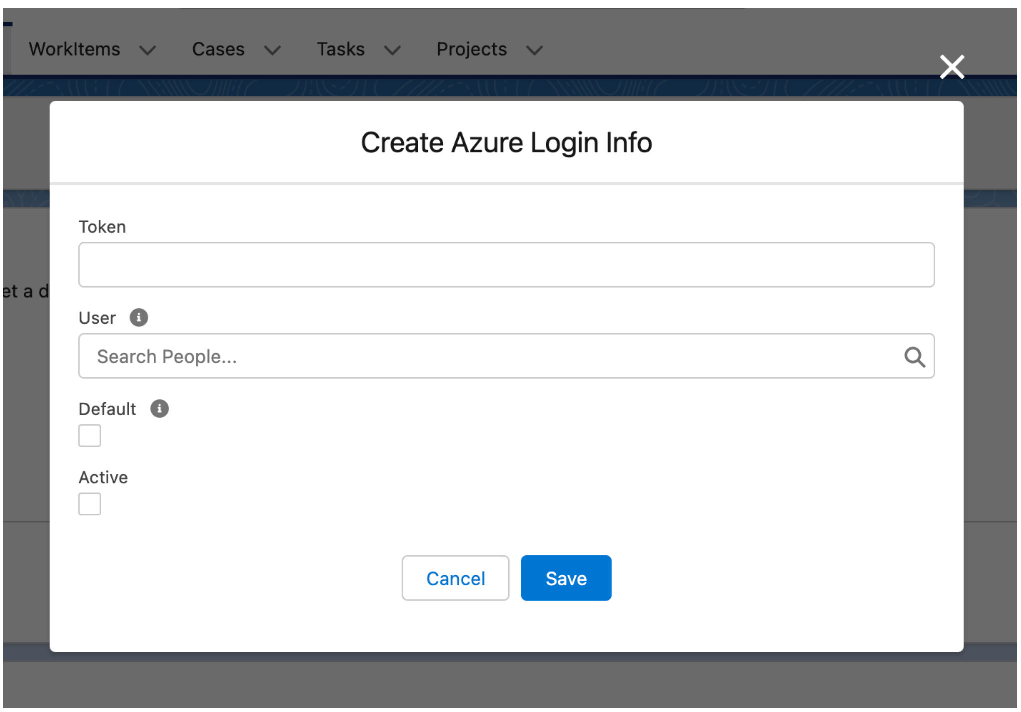
- Token - enter your PAT here.

- User - Select the user that this token will be associated with.

  Important: the current user will only see the token that was associated with him. Each user can have only one Azure Login Info record.

- Default - Select this checkbox if you are using the token if you want the request to be retried using the current one (If a request using a different token was unsuccessful). There can be only one default token, so when filling in this field, the previous default token automatically ceases to be one.
- Active - Select this checkbox if your token is valid and not expired. If your token is invalid, when you try to use it, it will be deactivated.

Click "Save" to add a new entry. Click "Cancel" to clear the form.



Note: When a user tries to start a process with an incorrect token, the user will receive a notification and the token will be deactivated. To correct the entry and activate the token again - go to the "Azure login info" tab and edit the record.

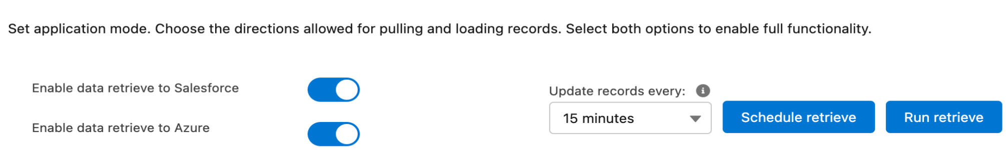
4. If the Organization Name and Token were filled in correctly, the "Set the Default Project" field will appear in the component. Select a project name to be used by default when creating entries where no project is specified. Also, from the default project, Work Item Type objects will be created that will correspond to the existing types in Azure.

5. After selecting the Default Project, user needs to determine the direction of the application processes.

- Select the option "To Azure": creation, updating and deleting records in Azure Organization will be available. If the user changes records in Salesforce Org, the changes will also be made in the Azure Organization.
- Select the "To Salesforce" option: creation, updating and deleting records in Salesforce Org. If a user makes changes to a record in their Azure Organization, the changes will also be made to the corresponding record in Salesforce.
- Select both options to enable package functionality in both directions.

5. User can automate the process of data retrieval by selecting a frequency from the "Update records every:" picklist and clicking the "Schedule retrieve" button. The data will be retrieved automatically with the specified time interval.

Note: If the user needs to retrieve the data once, pressing the "Run retrieve" button will start this process.

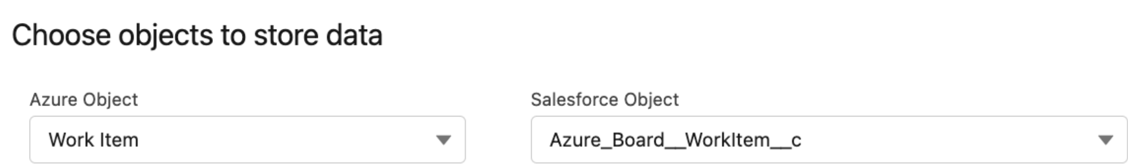


CONFIGURATION

Azure Mapping Settings

In the "Azure Mapping Settings" component, user can select an object in Salesforce, which will be used for data retrieval. The Work item object is set by default.

In the "Choose objects to store data" section, user selects which object on his org will be used to record and store data from Azure.



If the user chooses to use not an Azure_Board_Work_Item__c object, you need to manually configure the mapping fields.
To do this, go to the table "Field Mapping Setup".

1. The "Azure Field Title" column represents the names of the fields in Azure.
2. The "Field Type" column contains picklists with field types available for selection on your Salesforce org.
3. The "Salesforce Field Name" column contains picklists with fields of the previously selected type available for writing.
4. If you have selected the Lookup field type, the “Lookup Field” column will display the writable fields on the Lookup object.

The object must match Work item and have the following fields:

- Parent ID - can be a String or Lookup field.
- URL - can be a URL type field only.
- Description - For correct display of formatting, the field must be of type Rich Text Area. When using the Task object, it is not possible to create a field of the Rich Text Area type - therefore, the original text formatting may not be preserved.
- Title - can be a field of type String only.
- Effort - can be a RecordType, String or Lookup field.
- Priority - can be a RecordType, String or Lookup field. Values for this field can only be "1", “2”, “3” and “4”. When using a Picklist type field, make sure the Picklist contains the required values.
- Target date - can be a field of type DateTime only.
- Start date - can be a field of type DateTime only.
- Reason - can be a RecordType, String or Lookup field.
- State - can be a RecordType, String or Lookup field. Values for this field can only be "To Do", “Doing” and “Done”. When using a Picklist type field, make sure the Picklist contains the required values.
- Assigned to - can be a String or Lookup field only. For a correct data entry, this field must be filled in with the email of the user to whom this work item was assigned.
- Work Item Type - field can be of type Lookup only. For correct functioning, it is recommended to use only the standard set of types: "Issue" , "Task", "Epic". Use the Name field on the custom object "Work Item Type" to store this value.
- Project - field can be of type Lookup only. Use the Name field on the custom object "Project" to store this value.
- Azure ID - the field must be of type "String" and configured as "External Id".

Field Mapping Setup

Azure Field Title	Field Type	Salesforce Field Name	Lookup Field
Parent ID	Lookup	Azure_Board__Parent__c	Azure_Board__Azure_Id__c
URL	URL	Azure_Board__Azure_URL__c	
Description	String (Rich)	Azure_Board__Description_Ric...	
Title *	String	Name	
Effort	String	Azure_Board__Effort__c	
Priority	String	Azure_Board__Priority__c	
Target date	DateTime	Azure_Board__TargetDate__c	
Start date	DateTime	Azure_Board__StartDate__c	
Reason	String	Azure_Board__Reason__c	
State	String	Azure_Board__State__c	
Assigned to	Lookup	Azure_Board__AssignedTo__c	Email
Work Item Type *	Lookup	Azure_Board__Work_Item_Type...	Name
Project	Lookup	Azure_Board__Project__c	Name
Azure ID *	External Id	Azure_Board__Azure_Id__c	

After field configuration, click the "Save changes" button at the bottom of the component. If your setting was incorrect, the button will be inactive. Make sure that the selected fields are not repeated.

Note: If the user needs to reset the configuration to default, press the "Set default settings" button. If the user needs to reset the object"s settings to the last save - press the "Reset changes" button.

THE PROCESS OF CREATING AND MODIFYING DATA (query tab)

After a user sets up a scheduled data pull or starts a one-time retrieve, an asynchronous data retrieve process will start.

If a user uses one of the following objects in configuration - Work Item, Case, Task - such operations as update, delete and create on your org will run automatically. When creating, updating or deleting records of the Task, Case or Work Item object the data will be automatically transferred to your Azur Organization.

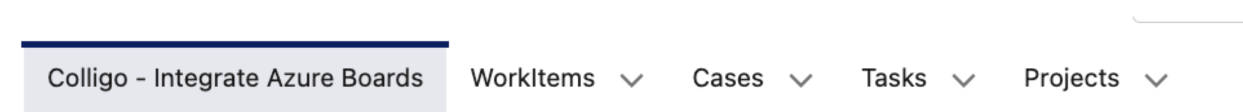
Note: Make sure you select the "To Azure" option in the Integration Setup component.

When selecting any other custom object,automatic data retrieval process is not available. The process of creating or deleting requires a Scheduled job or pressing the "Run retrieve" button. The operation of updating information on such objects in the "To Azure" direction is not provided.

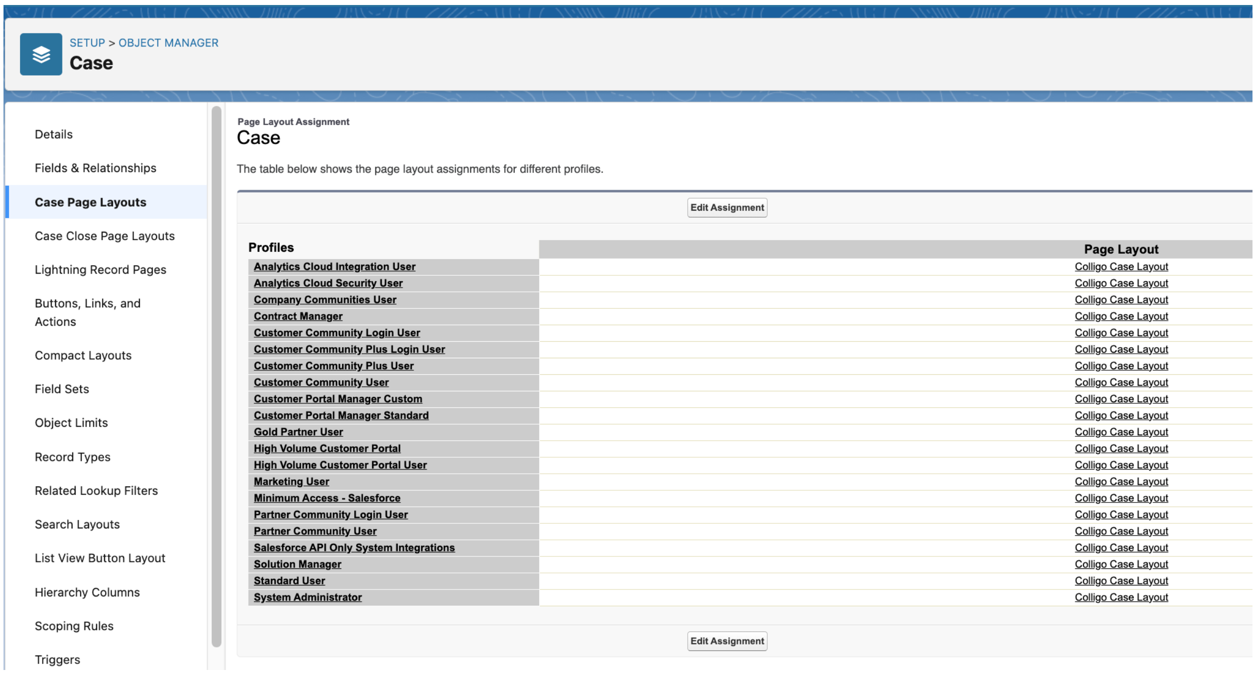
The process of information retrieved from the Azur Organization to your Salesforce Organization is the same for all objects.

Note: Make sure you have selected the "To Salesforce" option in the Integration Setup component.

The user can view his records in one of the tabs of the application.



Note: To view the required fields on the Task and Case objects, the user must set the appropriate layouts. Choose the Colligo Case/Task Layout in Case/Task Page Layouts Assignment.

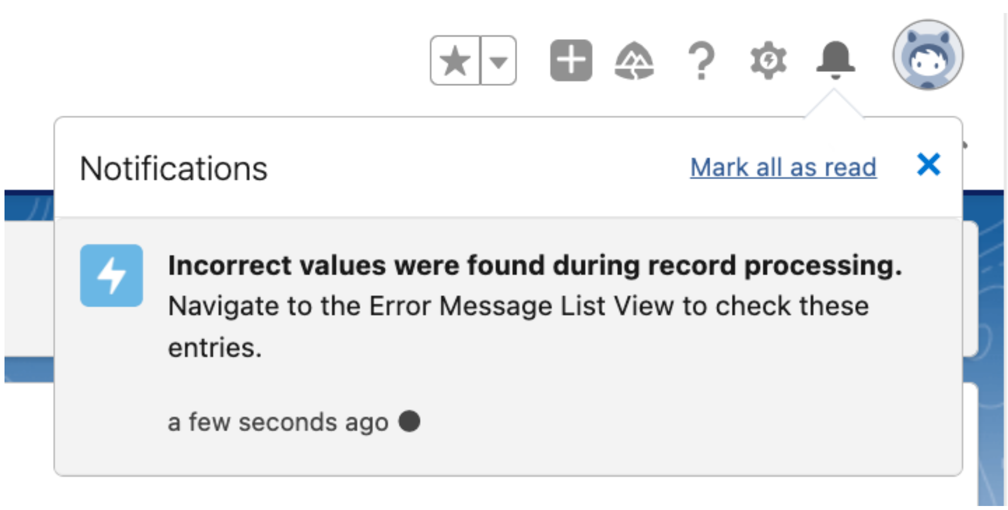


ERROR REPORTING

In case the user uses the Task, Case or Work Item object and one of the following fields was filled in incorrectly:

1. Priority - the field can only contain the values :
   - 1
   - 2
   - 3
   - 4
2. State - the field can only contain the values :
   - To Do
   - Doing
   - Done
3. Work Item Type - the field can only be of type:
   - Issue
   - Task
   - Epic

In case of incorrect filling of the indicated fields the user will receive a custom notification. When clicking on the notification, the user will be redirected to the "Error Status Message" layout, where all records with incorrect values will be displayed.



Details about the error can be viewed by the user in the "Status Message" field.