

Title

After building your configurator or making other settings, you deploy your creations into another environment so they can be tested and used. Learn about the 3 environments that separate the tasks of developing, testing, and using your work. Then see what is moved from one environment to the next... and what remains behind. Finally, see the specific steps required to deploy code into another environment.

Objectives

- Learn about the three environments that separate the tasks of developing, testing, and using your work.
- Then discover what is moved from one environment to the next... and what remains behind.
- Finally, see the specific steps required to deploy code into another environment. Topic 4

Environment Basics

Each company like yours that uses Epicor CPQ has three environments in our CPQ cloud: dev, test, and prod.

Dev is where you have spent your time as a company administrator developing your application.

Once ready, a configurator can be deployed to the test environment, where your testers will confirm things are working correctly. There are only production candidates here: no experimental prototypes clutter this space.

After testing, your application will be deployed from the showroom of the test environment into the real world of the production environment.

Also called “prod”, production is where your users will request actual configurations they want configured, priced, and quoted.

Your creations always flow from the workshop of Dev to the laboratory of Test to the real world of Production.

For security and easier administration, all your development work is done in dev. Changes cannot be made directly to test or production. Rather, you’ll make changes in dev, then deploy that change into those other environments. In this way, you have a safe “workshop” for building... your business colleagues can confidently test in a separate showroom... and your users can configure and quote in production with no distractions.

These three environments have different URLs. Each environment starts with the name of your organization, but the development and test environments have the words “dev” and “test” added to them.

As a company administrator, you can see which environment you’re connected to by looking at the URL in your browser as you work. You can also see a color-coded drop-down list in the upper right, next to the link to the administrator interface. You can use this menu to jump easily between environments.

What’s a Deployment?

When your designs move through three environments, the movement itself is called a deployment.

Think of it like a recipe, or a set of instructions. Given all the things that have been built in one environment, a deployment can gather up just the changes you want, so they are applied the same to the next environment.

Just about anything you create in the administrative menu can be deployed, from configurators and 3D scenes to resources, workflows, and even the general settings of an organization.

But there are other things you create as you build in dev, or review in test, which are not deployed. You may create a quote, with some custom products in it. Or an entry in the server logs. Or a user who will perform testing.

These other things are not included in a deployment. Simply because they are not necessary, and would only confuse things.

Keep this in mind: your deployment will only include the structures you've built. It won't include the transactions or other data that were generated as a result of your designing or testing.

There's one more kind of data that is excluded from deployment. Database tables and database views are not deployed.

These optional components are not used by every company, so you may not have any database tables or views. You may only use the tables shown in the resources tab. These tables, like any other resource, are deployed. Database tables and views are not.

If your design includes database tables or views, you must move your database updates yourself. You can do this manually by connecting to the database, or automatically through a business integration tool.

Separating database items from deployment gives your company more flexibility.

Performing a Deployment

Deployments are how you can release your design for testing, or for actual use by real customers. Let's see how it's done.

First, ensure your work is complete and is working well. If you are deploying from test into production, you should be sure you have the necessary approvals from your testers first.

Connect to your dev environment, and select infrastructure > deploy from the administrative menu.

A new deploy window appears.

At the top of the window, you can start to define a new deployment. At the bottom of the window, you see a list of all deployments in the past.

To create a new deployment, first choose your source and destination environments. For example, you may deploy from dev to test, or from test to production. You cannot deploy backwards.

Give your deployment a name. Usually, this would be some identifier that helps you find more information about the deployment in your internal documentation. You can add a helpful phrase as well.

Leave the "deploy all changes" tickbox unchecked. If you turn this on, everything from one environment will be deployed to the next. Rarely is this a good idea. Leave it off.

Finally, click the "compare" button to begin selecting the items you want to include in the deployment. If you don't see the "compare" button, check your settings again.

The system calculates the changes between the source and destination.

A new deployment comparison window appears.

All items in this list are sorted first by the type of object, and then by the ID of the object.

Here, for example, we see some product categories.

Note the colorful icons listed next to each item you can deploy. The green plus symbol means that this item does not exist in the target environment. A deployment will add it.

The red bar icon means the item has been deployed to the target environment some time in the past, and since then has been deleted in the source environment. A deployment will delete it from the target environment.

Finally, the black pencil icon means that an older version of the item already exists in the target environment. A deployment will update it.

Clicking any row in the table will open an information pane. Here you can see the detailed difference between the item in both source and target environments. For example, if we click on an item that will be updated, we see details of the change that would be applied.

Click the checkbox next to any item to include it in the deployment.

Note that some items have a plus symbol next to them. This means the item has dependencies. It cannot be deployed unless other related components it depends on are also deployed.

Click the plus symbol to open and close the list of that item's dependencies.

Adding an item to the deployment without adding the dependent items blocks the deployment.

To complete your deployment, select the items you wish to deploy, and include any dependencies. Carefully review each item's details, so you are aware of the changes you are deploying.

Once you're happy with the items you've added, and there are no errors, then you can start the deployment by clicking the "deploy" button.

Your deployment starts. You automatically return to the list of deployments. This screen refreshes every few seconds, and you can see your deployment at the top of the list. The status changes as your deployment completes.

In this list, you can click any entry to see the details of what was deployed.

Recap

in summary, a deployment is a collection of changes you make in one environment that you want to apply to another environment. You have reviewed the three environments that separate the tasks of developing, testing, and using your work.

You discovered what is moved from one environment to the next... and what remains behind.

Finally, you saw the specific steps required to deploy code into another environment.

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