Migrata Installation and Setup

Salesforce data migration for Revenue Cloud, CPQ and custom objects. Published by Selegic Inc.

1. Before you start

- You can sign in as a **System Administrator** in the Salesforce org where Migrata will be installed. This is called the **console org**.
- The org uses **Lightning Experience**. Migrata is not supported in Salesforce Classic.
- **API access** is enabled in the org.
- You have the Migrata listing on AppExchange, or an install link from Selegic.
- The Migrata server is set up for you. Selegic hosts and maintains it. To get set up, contact **ddas@selegic.com**.

2. Install the package

1. Sign in to the console org as a System Administrator.
2. Open the Migrata listing on AppExchange and choose **Get It Now**, or open the install link from Selegic. To install into a sandbox, use `test.salesforce.com` instead of `login.salesforce.com` in the link.
3. Check the package name, the version and the publisher, **Selegic Inc.**
4. Under **Install for**, choose **Install for Admins Only**. This is the recommended choice. You can give other people access later with permission sets.
5. Click **Install**. Salesforce shows a third-party access warning, because Migrata sends requests to the Migrata server. Click **Continue**.
6. Wait for the install to finish. For larger packages it can take several minutes, and Salesforce may email you when it is done.
7. Check the result in `Setup > Apps > Packaging > Installed Packages`. Migrata should be listed as Installed.

3. Give people access

Migrata includes two permission sets. Without one of them, a user cannot see the Migrata app.

Permission set	Who needs it
Migrata Admin	Administrators and migration specialists who set up batches, connect orgs and run migrations.
Migrata API Access	Users in the console org who need full API-level access. Migrata also assigns it automatically to the integration user in each target org when you use **Deploy**

	Metadata and **Assign Permission**.

To assign one: `Setup > Users > Permission Sets`, open the permission set, choose **Manage Assignments**, then **Add Assignments**.

4. First-time setup inside Migrata

1. Open **Migrata** from the App Launcher, then open the **Admin Console**.
2. Go to **Scope Definition**. Under Data Object Scope, click **Reset Default** once. Then click **Update List** to fill in the default values.
3. Go to the **Prepare** tab and click **Prepare Metadata**. Wait until every step shows as completed.
4. Go to **Registered Orgs** and click **Add New Org**. Choose Production or Sandbox, then click **Login** and sign in with the normal Salesforce login. Do this for your source org and your target org.
5. For each source and target org, open the org card and click **Deploy Metadata**, then **Assign Permission**.

> If you reinstall Migrata, repeat this setup.

5. What to do next

Create a **Data Batch**, set the order of your objects, choose the external IDs, create a **Data Schedule** and run the migration. These steps are explained in the Migrata documentation, which is also available on this listing.
