IBM OpenPages with Watson
Version 8.2.0.1

Wolters Kluwer Upgrade ReadMe

NOTE
Before using this information and the product it supports, read the information in the “Notices” section of this document.

Product Information

This document applies to IBM OpenPages with Watson 8.2.0.1 and may also apply to subsequent releases.

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RCM 8.2.0.1 Wolters Kluwer Upgrade Cookbook

Introduction

The RCM Wolters Kluwer (WK) feature has three parts:

- **Wolters Kluwer Regulatory Events Import**: This feature enables clients to import Regulatory Events from Wolters Kluwer into IBM® OpenPages with Watson. The import creates WKRegEvents for the incoming regulatory events.
- **Wolters Kluwer Regulatory Events rules and workflows**: Out-of-the-box rules and workflows are included. These workflows and rules provide a simple set of workflows for incoming Regulatory Events from the Wolters Kluwer feed.
- **Regulatory Library** This feature provides new standardized associations and system views for RCM content: Mandates, SubMandates, and Requirements.

Prerequisites

Wolters Kluwer provides a subscription service, which is sold separately from OpenPages. Customers must have a subscription and meet its prerequisites before they set up the Wolters Kluwer feature in OpenPages. For example, customers must know the API connection information for the Wolters Kluwer XML feeds.

Determining an upgrade strategy

This cookbook assumes that you are familiar with developing and deploying OpenPages solutions and that you know how to use the related technologies, such as ObjectManager, XML, and server access.

This cookbook combines a number of loader steps and manual procedures. It's up to the Services team to determine what steps need to be done in a client engagement. **For a customer engagement, it is likely that you'll refactor the loader XML files into your own deliverable package** to simplify the manual steps and to work around any differences due to a client's customizations.

Please note that the automated scripts and manual instructions set the ObjectManager setting, `configuration.manager.vendor.mode = true`, which will override any changes you may have made to existing profiles, views, etc in the package. If you do not want this, please refactor the loader XML files to suit your needs.

In general, clients can choose to load only some of the following Wolters Kluwer capabilities or all of them. In some cases, a client's existing solutions might not work with the new dependencies. You'll need to perform remediation on a case-by-case basis.

Wolters Kluwer import

With this feature, clients can retrieve data from a Wolters Kluwer *feed* by using the API configuration that is provided to each client when they purchase a subscription. The feature is hard coded to create a `WKRegEvent` object for incoming regulatory events. The WKRegEvent object type has a required set of non-configurable fields. Clients can add additional fields, however. For example, clients can add fields for their own taxonomies.

For this feature to work end-to-end, you must set up OpenPages with:

- Schema
  - The new WKRegEvent object type
  - Field groups

- CSV fileType and the association of fileType to `SysXMLDocument`
- Relationships
- Registry settings
- Profiles that include the new object type, field groups, and fields
- System views for the new and updated object types
- Role templates that include permissions for the new object type
- A default business entity structure

Notice: Unlike solutions updates that you've done in the past, due to the technical and legal specifics for the Wolters Kluwer data feed import, many of the schema elements that are required for this feature **are not configurable**. The fields, object types, and certain other settings are mandatory and cannot be configured to other values.

Wolters Kluwer workflows and rules

Rules are used by the Wolters Kluwer import to perform some operations automatically when the rule criteria are met. (For example, a rule can start a workflow or send a notification.) Rules are configured through a new page in the Task Focused UI. OpenPages provides out-of-the-box rules for WKRegEvents.

The Wolters Kluwer import feature does not require the out-of-the-box rules or workflows. However, the end-to-end RCM solution expects that the Wolters Kluwer data will feed the workflows that the customer defines.

Updated Regulatory Library objects

The *Regulatory Library* is the set of six object types that the client uses to maintain their regulatory information. In 8.1.0.1, three of these object types were updated. The changes include new field groups, fields, and relationships. Version 8.1.0.1 also added system views specifically for the RCM Master profile in addition to the default system views.

The object types that are part of the Regulatory Library are:

- Mandate
- SubMandate
- Requirement
- Policy [Unchanged in 8101]
- Procedure [Unchanged in 8101]
- Control [Unchanged in 8101]

These updates are not required for the Wolters Kluwer regulatory event import. But they are required for the Wolters Kluwer regulatory library import.

Loading the Wolters Kluwer object types in 8.2.0.1

The loader files are not on the installation media. The OpenPages Support team can give clients access to a package that contains the 8.2.0.1 loader files.

All the changes for Wolters Kluwer in 8.2.0.1 are documented in later sections in this cookbook. To simplify the update and to save time, we've provided a shell script that loads all the files. You can choose to load the changes automatically or manually select the changes as appropriate for your client's environment.

You can load the files remotely using the ObjectManager client or, for non-Cloud Pak for Data environments, load the files from the application server.

Loading files remotely

As of 8.2.0.1, you can now import the loader files remotely by using the ObjectManager client tool, which you download separately. For instructions on how to set up the ObjectManager tool, see the *Administrator's Guide*: https://www.ibm.com/support/knowledgecenter/SSFUEU_8.2.0/op_grc_admin/t_remote_utils.html.

To load the feeds remotely, you must:

- Download the package and expand it to your local machine, later referred to as the `FEED_FOLDER_LOCATION`
- Set up the environment variable, `OPC_BIN_DIR`, to point to the tools' bin folder.
- Set up the URL of the remote server in openpages-tools-client.properties: `rest.url.path=https://<host:port>/grc/api`.

Note: To set up the feed on IBM OpenPages for IBM Cloud Pak for Data, you must use the ObjectManager client remotely.

Loading files from the application server

To set up the feed from the application server, you must download the package and expand the package contents to your application server at the location: `PATH_IN_OP_SERVER/Upgrade-Accelerators/RCM`, later referred to as the `FEED_FOLDER_LOCATION.`

8.2.0.1 package

The 8.2.0.1 package contains all the changes for Wolters Kluwer support since its initial release in 8.1.0.1. Each folder contains the release-specific changes, which can be loaded into 8.2.0.1 as follows:

RCM_WK_8101_Loader_Files	Folder containing the 8.1.0.1 changes only
RCM_WK_8200_Loader_Files	Folder containing the 8.2 changes only
RCM_WK_8201_Loader_Files	Folder containing the 8.2.0.1 changes only

Which changes to apply depends on the current version of RCM that you have.

Pre 8.1.0.1 → 8.2.0.1	Load the changes in all the folders.
8.1.0.1 → 8.2.0.1	Load the changes in the RCM_WK_8200_Loader_Files folder.
	Then load the changes in the RCM_WK_8201_Loader_Files folder.
8.2.0.0 → 8.2.0.1	Load the changes in the RCM_WK_8201_Loader_Files folder.

Note: Use only the 8.2.0.1 package to load the changes across releases. Do not attempt to use previously published packages to load or upgrade to 8.2.0.1.

Loading Wolters Kluwer object changes automatically

Upgrading from a pre-8.1.0.1 install or a fresh 8.2.0 install with fix pack 8.2.0.1

Go to the location where you copied the Wolters Kluwer package on the application server.

Follow these steps:

1. Go to your `FEED_FOLDER_LOCATION`.

2. Do one of the following steps:
    - If running from a Linux system:
        - Run: `chmod +x Run_RCM_WK_Full.sh`
        - `./Run_RCM_WK_Full.sh OpenPagesAdministrator PASSWORD`
    - If running on a Microsoft Windows system:
        - Run: `Run_RCM_WK_Full.bat OpenPagesAdministrator PASSWORD`

Upgrading from an 8.1.0.1 install

Go to the location where you copied the Wolters Kluwer package on the application server.

Follow these steps:

3. Go to the `FEED_FOLDER_LOCATION` folder.
4. Go to the `RCM_WK_8200_Loader_Files` directory and do one of the following steps:
    - If running from a Linux system:
        - Run: `chmod +x RCM_WK_8200_loader.sh`
        - `./RCM_WK_8200_loader.sh OpenPagesAdministrator PASSWORD`
    - If running on a Microsoft Windows system:
        - Run: `RCM_WK_8200_loader.bat OpenPagesAdministrator PASSWORD`

Loading Wolters Kluwer object changes manually

In this section, we go over all the commands that are run and explain the changes. You can run the commands in this section instead of using the shell or batch scripts.

Upgrading from a pre-8.1.0.1 install or a fresh 8.2 install with fix pack 8.2.0.1

Do these steps if you upgraded or migrated from a pre-8.1.0.1 release or if you did a fresh installation of 8.2.0 and then applied fix pack 8.2.0.1.

Loading the WKRegEvent object type schema and its labels (8.1.0.1)

1. Set the `ObjectManager.properties` flags
   `configuration.manager.vendor.mode = true`
   `configuration.manager.force.update.object.strings=true`
   `configuration.manager.force.update.application.strings=true`

2. Load the files with ObjectManager

```
./ObjectManager.sh l c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_WK_8101_Loader_Files/Schema/ WK_object_schema
./ObjectManager.sh l c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_WK_8101_Loader_Files/Text/
WK_object_schema_strings_en_US
```

3. Set the `configuration.manager.vendor.mode`, `configuration.manager.force.update.object.strings`, `configuration.manager.force.update.application.strings` flags back to false

The schema in these files is referenced from the code and *cannot* be modified or renamed. Clients can only rename the labels or add additional fields to these objects. The schema contains the following field groups:

- `RCM-WK-RegEv` Contains the main fields for the WKRegEvent object type.
- `RCM-WK-Taxonomy` Contains the taxonomy fields for WKRegEvent.
- `RCM-RegEv-Shared` Contains shared fields that are used by all RegEvent objects.

The RCM-WK-Taxonomy field group is also assigned to the Mandate, SubMandate, and Requirement object types. This assignment is required for the Regulatory Library Import feature to work.

If the client does not have one of these object types, remove the association from the loader file.

A query is also included in this file, My WK Regulatory Events. This query filters WKRegEvent objects that are owned or assigned to the current logged in user. This query is used in the dashboard.

Loading the RCM shared schema and its labels (8.1.0.1)

1. Set the ObjectManager.properties flags
   configuration.manager.vendor.mode = true
   configuration.manager.force.update.object.strings=true
   configuration.manager.force.update.application.strings=true

2. Load the files with ObjectManager

```
./ObjectManager.sh l c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_WK_8101_Loader_Files/Schema/
RCM_wk_shared_schema
./ObjectManager.sh l c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_WK_8101_Loader_Files/Text/
RCM_wk_shared_strings_en_US
```

3. Set the configuration.manager.vendor.mode, configuration.manager.force.update.object.strings, configuration.manager.force.update.application.strings flags back to false

The schema in these files are referenced from the code when loading the Wolters Kluwer Regulatory Library and *cannot* be modified or renamed. Clients can only rename the labels or add additional fields to these objects.

The schema contains the following field group:

- RCM-WK-Shared Contains shared fields that are used for Wolters Kluwer regulatory library object types. This field group is assigned to the Mandate, SubMandate, and Requirement object types.

Loading registry settings (8.1.0.1)

```
./ObjectManager.sh l c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_WK_8101_Loader_Files/Registry/ WK_registry_entries
```

This file creates all the registry settings that are required to configure the loading of WKRegEvent objects from the feed. These values cannot be customized. The WKRegEvent object type must already exist before you load this file.

Loading permissions (8.1.0.1)

```
./ObjectManager.sh l c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_WK_8101_Loader_Files/Registry/ WK_permissions
```

The Wolters Kluwer feed can be configured from the WKRegEvent grid page. To see the gear icon on the top of the grid, users must have this application permission.

Load the base required relationships for Wolters Kluwer import (8.1.0.1)

```
./ObjectManager.sh l c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_WK_8101_Loader_Files/Schema/ WK_object_relationships
```

(Optional) Load the extended relationships for the Wolters Kluwer object types. This is not required by the Wolters Kluwer Import feature, but it is required for the Regulatory Library and RCM workflows.

> **Note:** You might need to do some manual rework before you load this file. Pre-8.1 out-of-the-box solutions had an object model that was incompatible to this loader. Pre-8.1, the RegChange and RegTask object types were an ancestor or parent of other objects: Policy, Procedure, Control. This would result in a loop. You must disable these relationships before loading this file, if they exist.

Example: For a client with the 7.4 OOB solutions schema, you need to disable the following object associations manually: RegTask -> Policy association, Policy -> Requirement, Procedure -> Requirement, and Control -> Mandate / SubMandate / Requirement. If you do not, you will see errors like this:

```
Loader EXCEPTION (Line: 37 Column: 38): An unexpected exception occurred.
Please see ObjectManager.log for details.
Error Message: OP-06028: Hierarchy structure rule of relation type "1" between
object types "141" and "105" for the hierarchy type "1" creates a loop.
Indicator if rule is supported is "1". [T94KCZOO0HRN]
```

Warning If you see the above error, then you won't be able to load the new relationships even after you disable the object associations. This is a known issue that is being investigated. To work-around the issue, you might need to manually drop "orphaned" tables from the reporting schema in order to reset the database to a clean state.

Loading other strings (8.1.0.1)

These strings are used by the Wolters Kluwer import. The strings include email templates, dashboard, and UI text strings.

1. Set the `ObjectManager.properties` flags
   `configuration.manager.vendor.mode = true`
   `configuration.manager.force.update.application.strings=true`

2. Load the file with ObjectManager

   ```
   ./ObjectManager.sh l c OpenPagesAdministrator <password>
   FEED_FOLDER_LOCATION/RCM_WK_8101_Loader_Files/Text/ Other_strings
   ```

3. Set the `configuration.manager.vendor.mode`, `configuration.manager.force.update.application.strings` flags back to false

Loading the Wolters Kluwer taxonomy mapping (8.1.0.1)

Before loading the taxonomy mapping file, you need to add the text/csv file type to OpenPages and make sure that text/csv is added to the file upload content types.

You can load the following file to do so:

```
./ObjectManager.sh l c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_WK_8101_Loader_Files/Schema/ RCM_wk_file_type
```

Note: If you don't have this file (it was added later), you can use this XML to add the new content type:

```
<openpagesConfiguration xmlFormatVersion="1.31">
        <systemAdminMode enabled="false"/>
    <fileTypes>
        <fileType name="csv (text/csv)" mimeType="text/csv"
fileExtension="csv" searchEnabled="false"/>
    </fileTypes>

    <systemAdminMode enabled="true"/>
    <fileUploadContentTypes>
        <contentType name="SysXMLDocument" description="System Object Type"
rootFolder="/" category="System" multiVersionable="true"
searchEnabled="false">
            <fileTypeAssignment name="csv (text/csv)"/>
        </contentType>
    </fileUploadContentTypes>
</openpagesConfiguration>
```

This file loads the default mapping file.

```
./ObjectManager.sh l c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_WK_8101_Loader_Files/Schema/ WK_taxonomy_map
```

This file loads the default mapping file.

Loading Wolters Kluwer entities (8.1.0.1)

These files create the default business entity hierarchy for Wolters Kluwer imported data. The Wolters Kluwer import expects the following business entity paths to exist so that it can create objects underneath them: `BusinessEntity/Library/RCM/RegEvents/WKRegEvents` for regulatory events and `BusinessEntity/Library/RCM/RegLibrary/WKRegLibrary` for regulatory library objects.

Note: For a loader file that contains these entity resources for fresh installs, see the following files `RCM_WK_8101_Loader_Files/Schema/WK_parent_entity-op-config.xml`, `RCM_WK_8101_Loader_Files/Schema/WK_reg_library_entity-op-config.xml`

Here are the commands to load the files:

```
./ObjectManager.sh l c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_WK_8101_Loader_Files/Schema/ WK_parent_entity
./ObjectManager.sh l c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_WK_8101_Loader_Files/Schema/ WK_reg_library_entity
```

Loading WKRegEvent system views (8.1.0.1)

This file includes the grid and task views for the WKRegEvent object. The file also adds a default creation view, although creation is disabled by default for WKRegEvent.

1. Set the `ObjectManager.properties` flags
   `configuration.manager.vendor.mode = true`
   `configuration.manager.force.update.application.strings=true`

2. Load the files with ObjectManager

```
./ObjectManager.sh l c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_WK_8101_Loader_Files/View/ sv-WKRegEvent
./ObjectManager.sh l c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_WK_8101_Loader_Files/View/ sv-app-string-keys-
WKRegEvent
```

3. Set the `configuration.manager.vendor.mode`, `configuration.manager.force.update.application.strings` flags back to false

Loading the new RegChange system view for Wolters Kluwer regulatory events (8.1.0.1)

This file includes the new RegChange view that's used with the WKRegEvent object. The view is also used in the workflows.

1. Set the `ObjectManager.properties` flags
   `configuration.manager.vendor.mode = true`
   `configuration.manager.force.update.application.strings=true`

2. Load the files with ObjectManager

```
 ./ObjectManager.sh l c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_WK_8101_Loader_Files/View/ sv-RegChange
 ./ObjectManager.sh l c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_WK_8101_Loader_Files/View/ sv-app-string-keys-
RegChange
```

3. Set the `configuration.manager.vendor.mode`, `configuration.manager.force.update.application.strings` flags back to false

Loading the new Mandate system view for the Wolters Kluwer library objects (8.1.0.1)

This file includes the new Mandate view that's used for the Wolters Kluwer Regulatory Library.

1. Set the `ObjectManager.properties` flags
   `configuration.manager.vendor.mode = true`
   `configuration.manager.force.update.application.strings=true`

2. Load the files with ObjectManager

```
 ./ObjectManager.sh l c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_WK_8101_Loader_Files/View/ sv-Mandate
 ./ObjectManager.sh l c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_WK_8101_Loader_Files/View/ sv-app-string-keys-
Mandate
```

3. Set the `configuration.manager.vendor.mode`, `configuration.manager.force.update.application.strings` flags back to false

Loading the new SubMandate system view for Wolters Kluwer library objects (8.1.0.1)

This file includes the new SubMandate view that's used for the Wolters Kluwer Regulatory Library.

1. Set the `ObjectManager.properties` flags
   `configuration.manager.vendor.mode = true`
   `configuration.manager.force.update.application.strings=true`

2. Load the files with ObjectManager

```
 ./ObjectManager.sh l c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_WK_8101_Loader_Files/View/ sv-Submandate
 ./ObjectManager.sh l c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_WK_8101_Loader_Files/View/ sv-app-string-keys-
Submandate
```

3. Set the `configuration.manager.vendor.mode`, `configuration.manager.force.update.application.strings` flags back to false

Loading workflows and rules (8.1.0.1)

Load this file after you have loaded the new system views for the WKRegEvent and RegChange object types.

```
   ./ObjectManager.sh l c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_WK_8101_Loader_Files/Schema/ WK_rules_workflows
```

Loading role templates (8.1.0.1)

After you load the `WK Feed` permission, you need to associate it to a role template in order to use it in the application.

In Role Templates, include the `WKRegEvent` object in the role templates for users who will interact with the Wolters Kluwer data. Also, for those users who will configure and import the Wolters Kluwer feed, add the `<roleApplicationPermission name="All/SOX/Administration/WK Feed"/>`

Customize this file based on the client's role templates. The sample file that's included with the fresh install can be found here: `RCM_WK_8101_Loader_Files/Schema/WK_8101_roleTemplates-op-config.xml`

The command to load the file is:

```
   ./ObjectManager.sh l c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_WK_8101_Loader_Files/Schema/ WK_8101_roleTemplates
```

Wolters Kluwer Task Focused UI dashboard (8.1.0.1)

For the Task Focused UI dashboards, you might want to include the `My WK RegEvents` filter as a widget in your RCM users` default dashboard.

For example, see the loader file that contains the RCM dashboard for fresh install. It's here: `RCM_WK_8101_Loader_Files/ViewRCM_wk_dashboard_views-op-config.xml.`

1. Set the `ObjectManager.properties` flags
   `configuration.manager.vendor.mode = true`
   `configuration.manager.force.update.object.strings=true`
   `configuration.manager.force.update.application.strings=true`

2. Here's the command to load the file:

```
   ./ObjectManager.sh l c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_WK_8101_Loader_Files/View
RCM_wk_dashboard_views
   ./ObjectManager.sh l c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_WK_8101_Loader_Files/View
RCM_wk_dashboard_view_string_keys
```

3. Set the `configuration.manager.vendor.mode`, `configuration.manager.force.update.object.strings`, `configuration.manager.force.update.application.strings` flags back to false

New Content Source field value (8.1.0.1)

This update adds a new value `Wolters Kluwer` to the field. This update assumes that the schema has the `OPSS-Mand:Content Source` and `OPSS-SubMand:Content Source` property types. There's also a dependency defined between the new value and the existing values. Refer to the `RCM_wk_content_source-op-config.xml` file for all the details.

1. Set the `ObjectManager.properties` flags
   `configuration.manager.vendor.mode = true`
   `configuration.manager.force.update.object.strings=true`
   `configuration.manager.force.update.application.strings=true`

2. Load the new enum value for the Content Source field by running this command:

```
   ./ObjectManager.sh l c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_WK_8101_Loader_Files/Schema
RCM_wk_content_source
   ./ObjectManager.sh l c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_WK_8101_Loader_Files/Text
RCM_wk_content_source_strings_en_US
```

3. Set the `configuration.manager.vendor.mode`, `configuration.manager.force.update.object.strings`, `configuration.manager.force.update.application.strings` flags back to false

Apply changes from 8.2.x

Follow the steps for manually loading the 8.2-specific changes in the “Upgrading from an 8.1.0.1 Install” section below.

Upgrading from an 8.1.0.1 install

In 8.2, Wolters Kluwer introduced a new REST API for getting event and library updates. The changes in this release add the necessary configuration to support the new API, as well as some changes to the regulatory change review workflows.

Do these steps if you upgraded or migrated from 8.1.0.1 to 8.2.0, and then applied fix pack 8.2.0.1.

Loading registry settings (8.2)

```
./ObjectManager.sh l c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_WK_8200_Loader_Files/Registry/ WK_registry_entries
```

This file creates all the registry settings that are required to configure the loading of Wolters Kluwer regulatory events and library.

Loading Regulatory Change Review Workflows (8.2)

```
./ObjectManager.sh l c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_WK_8200_Loader_Files/Schema/
RegulatoryChangeReviewWorkflow
```

```
./ObjectManager.sh l c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_WK_8200_Loader_Files/Schema/
WKRegulatoryChangeReviewWorkflow
```

The WK Regulatory Change Review Workflow is triggered whenever a regulatory change (RegChange) object is created from a WKRegEvent object.

Apply changes from 8.2.0.1

Follow the steps for manually loading the 8.2.0.1-specific changes in the “Upgrading from an 8.2 Install” section below.

Upgrading from an 8.2 install

Do these steps after you install fix pack 8.2.0.1.

(Optional) Load the updated solution object model for Wolters Kluwer (8.2.0.1)

The changes in 8.2.0.1 do not require an update to the RCM model. The change in this version is to update the solution definition for RCM with WK.

1. Set the `ObjectManager.properties` flags
   `configuration.manager.vendor.mode = true`
   `configuration.manager.force.update.application.strings=true`
2. Load the file with ObjectManager:

   ```
   ./ObjectManager.sh l c OpenPagesAdministrator <password>
   FEED_FOLDER_LOCATION/RCM_WK_8201_Loader_Files/Schema/
   RCM_WK_solution_object_types
   ```

3. Set the `ObjectManager.properties` flags
   `configuration.manager.vendor.mode = false`
   `configuration.manager.force.update.application.strings=false`

Updating OpenPages profiles with Wolters Kluwer objects

In the following sections, we'll walk through the profile configuration and customization for the WKRegEvent object.

Loading the entire RCM profile automatically

The changes for the WKRegEvent object and library objects should also be applied to the client's specific profile. For example, the RCM profile file in `RCM_WK_8200_Loader_Files/Schema/RCM_8200_master-profile-op-config.xml` contains the default RCM profile that's included in the fresh install with all the above changes. You can load that profile completely by using this command:

```
./ObjectManager.sh b c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_WK_8200_Loader_Files/Schema/ RCM_8200_master-profile
```

Loading the Wolters Kluwer profile manually

1. In the Standard UI, include the `WKRegEvent` object type in the profiles of users who need to see these objects.

   After you include the new types in the profile, ensure that the **Navigational Views > Filtered List** view is enabled. Also ensure that the **Object Views > Detail** view is the default view.

- Update the display type and read-only properties for the included fields on `WKRegEvent`:

Field	Display Type	Read Only
System Fields:Name	Text	**False**
System Fields:Description	Text Area	**False**
System Fields:Location	Text	True
System Fields:Creation Date	Date	True
System Fields:Created By	Integer	True
System Fields:Last Modification Date	Date	True
System Fields:Last Modified By	Integer	True
RCM-WK-RegEv:Content Date Time	Date	True
RCM-WK-RegEv:Notes	Text	True
RCM-WK-RegEv:Deleted	Text	True
RCM-WK-RegEv:Workflows	On Demand	True
RCM-WK-RegEv:Document ID	Text	True
RCM-WK-RegEv:Document PDF Link	Rich Text	True
RCM-WK-RegEv:Document Link URL	URL	True
RCM-WK-RegEv:Document Name	Text	True
RCM-WK-RegEv:Document Language	Text	True
RCM-WK-RegEv:Regulator Loader ID	Text	True
RCM-WK-RegEv:Document Title	Text	True
RCM-WK-RegEv:Material Change	Text	True
RCM-WK-RegEv:Summary	Text	True
RCM-WK-RegEv:As Category 1 ID	Text	True
RCM-WK-RegEv:As Category 1 Name	Text	True
RCM-WK-RegEv:As Category 2 ID	Text	True
RCM-WK-RegEv:As Category 2 Name	Text	True
RCM-WK-RegEv:As Category 3 ID	Text	True
RCM-WK-RegEv:As Category 3 Name	Text	True
RCM-WK-RegEv:Authoritative Source ID	Text	True
RCM-WK-RegEv:Authoritative Source Name	Text	True
RCM-WK-RegEv:Citation ID	Text	True
RCM-WK-RegEv:Citation Name	Text	True

Field	Display Type	Read Only
RCM-WK-RegEv:Mentioned Full	Rich Text	True
RCM-WK-RegEv:Introduced Full	Rich Text	True
RCM-WK-RegEv:Amended Full	Rich Text	True
RCM-WK-RegEv:Repealed Full	Rich Text	True
RCM-WK-RegEv:Referenced Full	Rich Text	True
RCM-WK-RegEv:Mentioned	Rich Text	True
RCM-WK-RegEv:Introduced	Rich Text	True
RCM-WK-RegEv:Amended	Rich Text	True
RCM-WK-RegEv:Repealed	Rich Text	True
RCM-WK-RegEv:Referenced	Rich Text	True
RCM-WK-RegEv:Filing Date	Date	True
RCM-WK-RegEv:Effective Date	Date	True
RCM-WK-RegEv:Effective Date Type	Tet	True
RCM-WK-RegEv:Comments Due Date	Date	True
RCM-WK-RegEv:Release Date	Date	True
RCM-WK-RegEv:Item ID	Text	True
RCM-WK-RegEv:Error	Text	True
RCM-WK-RegEv:webNonweb	Text	True
RCM-RegEv-Shared:Applicability	List	True
RCM-RegEv-Shared:Analysis	Text	True
RCM-RegEv-Shared:Owner	User Selector	**False**
RCM-RegEv-Shared:Assignees	Multi Valued User Selector	**False**
RCM-RegEv-Shared:	Comments	True
RCM-WK-Taxonomy:Jurisdiction	*List	True
RCM-WK-Taxonomy:Industry	*List	True
RCM-WK-Taxonomy:Filing Status	*List	True
RCM-WK-Taxonomy:Update Type	*List	True
RCM-WK-Taxonomy:Document Type	*List	True
RCM-WK-Taxonomy:Regulator	*List	True

*The profile display type is List, but these fields use the "hierarchical enum" field data type and they're displayed differently in the Task Focused UI.

2. For the **Navigational Views > Filtered List** for `WKRegEvent`, click it and go to **Associated Filters**. Include the filter `My WK Regulatory Events`. This step is required to make the filter available in the Task Focused UI dashboards.

3. In the Standard UI, include the new `RCM-WK-Shared` and `RCM-WK-Taxonomy` field groups to the `Mandate`, `SubMandate`, and `Requirement` object types for any profiles that need to see these objects.

    - Update the display type and read-only properties for included fields. Do this for `Mandate`, `Submandate`, and `Requirement`.

Field	Display Type	Read Only
RCM-WK-Shared:AS Types	*List	**False**
RCM-WK-Shared:Status	Text	**False**
RCM-WK-Shared:Content Date Time	Date	**False**
RCM-WK-Shared:RC Record Type	Text	**False**
RCM-WK-Shared:RC Deleted	Text	**False**
RCM-WK-Shared:AS Description	Text	**False**
RCM-WK-Shared:AS Category 1 ID	Text	**False**
RCM-WK-Shared:AS Category 2 ID	Text	**False**
RCM-WK-Shared:AS Category 2 Name	Text	**False**
RCM-WK-Shared:AS Category 3 ID	Text	**False**
RCM-WK-Shared:AS Category 3 Name	Text	**False**
RCM-WK-Shared:Authoritative Source ID	Text	**False**
RCM-WK-Shared:Authoritative Source Name	Text	**False**
RCM-WK-Shared:Citation ID	Text	**False**
RCM-WK-Shared:Citation Name	Text	**False**
RCM-WK-Shared:Citation Description	Text	**False**
RCM-WK-Shared:Common Name	Text	**False**
RCM-WK-Shared:Codify	Text	**False**
RCM-WK-Shared:Primary Reference ID	Text	**False**
RCM-WK-Shared:Primary Reference URL	URL	**False**
RCM-WK-Shared:Secondary Reference ID	Text	**False**
RCM-WK-Shared:Secondary Reference URL	URL	**False**

Field	Display Type	Read Only
RCM-WK-Shared:Sort Order	Text	**False**
RCM-WK-Shared:Originator	Text	**False**
RCM-WK-Shared:Issuer	Text	**False**
RCM-WK-Shared:Issued Date	Date	**False**
RCM-WK-Shared:Rescinded Date	Date	**False**
RCM-WK-Taxonomy:Jurisdiction	*List	True
RCM-WK-Taxonomy:Industry	*List	True
RCM-WK-Taxonomy:Filing Status	*List	True
RCM-WK-Taxonomy:Update Type	*List	True
RCM-WK-Taxonomy:Document Type	*List	True
RCM-WK-Taxonomy:Regulator	*List	True

*The profile display type is List, but these fields use the "hierarchical enum" field data type and they're displayed differently in the Task Focused UI.

Add New Wizard

In a fresh install of RCM, the Add New feature is disabled for the WKRegEvent object by default.

To disable the button manually:

1. Open the Settings page in the Task Focused UI or in the Standard UI.
2. Go to `/Application/GRCM/Add New Wizard/Disable Add New Filtered List View Page Global Launch Points`.
3. Edit the value and add `WKRegEvent` to the list. Click Save.

Post-Install Steps

Views

All new views loaded are disabled by design. Before enabling them, evaluate what their priority should be with respect to the customer's existing views.

Scheduling

If you had Wolters Kluwer in 8.1.0.1, your schedule will have been removed by the 8.2 installer. Go to the Wolters Kluwer configuration screen and set that schedule again.

Reporting Framework

Because new fields have been added and changed in the OpenPages schema, it's a good idea to regenerate the reporting framework as a post-install step. Note that this step isn't required to run a Wolters Kluwer import or to use the workflows.

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