



Packaging

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RSA Archer 5x Migration Working Group

Speaker Info



Jonathan Kitchin
Professional Services – Migration Team
jonathan.kitchin@rsa.com
913-239-1827



Session Overview

- Review the brand new options offered by the Packaging feature
- Discuss impacts to your existing Dev/Test/Prod environments
- Offer time for questions





New Features

- Packaging 101
- Great Leap Forward
- Included Elements
- Demonstration

Packaging 101

- Migrate groups of applications and questionnaires in a single action.
- Make and test updates in development, then migrate the changes.
- Transfer settings for user and group information.



Purpose of Packaging

- Many companies maintain separate development and production hardware
- Updates to applications may be tested on a non-production server
- Can easily roll updates into applications currently in production

The Great Leap Forward



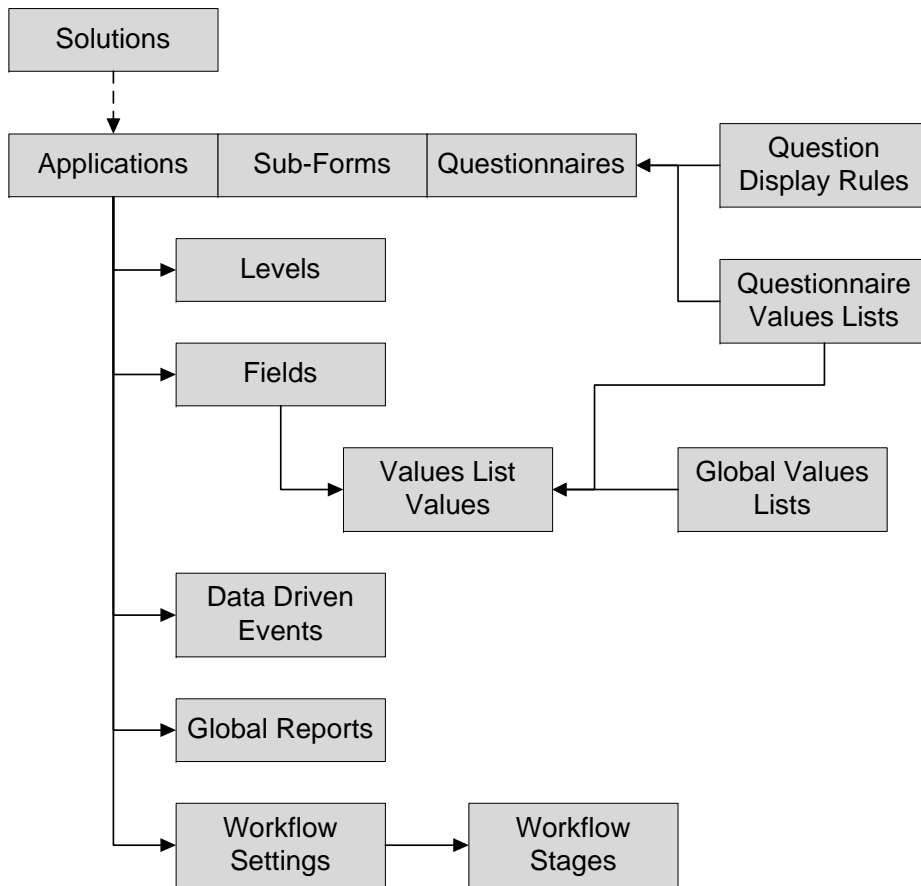
4x Options

- Download/upload applications one at a time
- Questionnaires NOT included
- User/Group selections and definitions NOT included
- Creates new objects every time NO updates

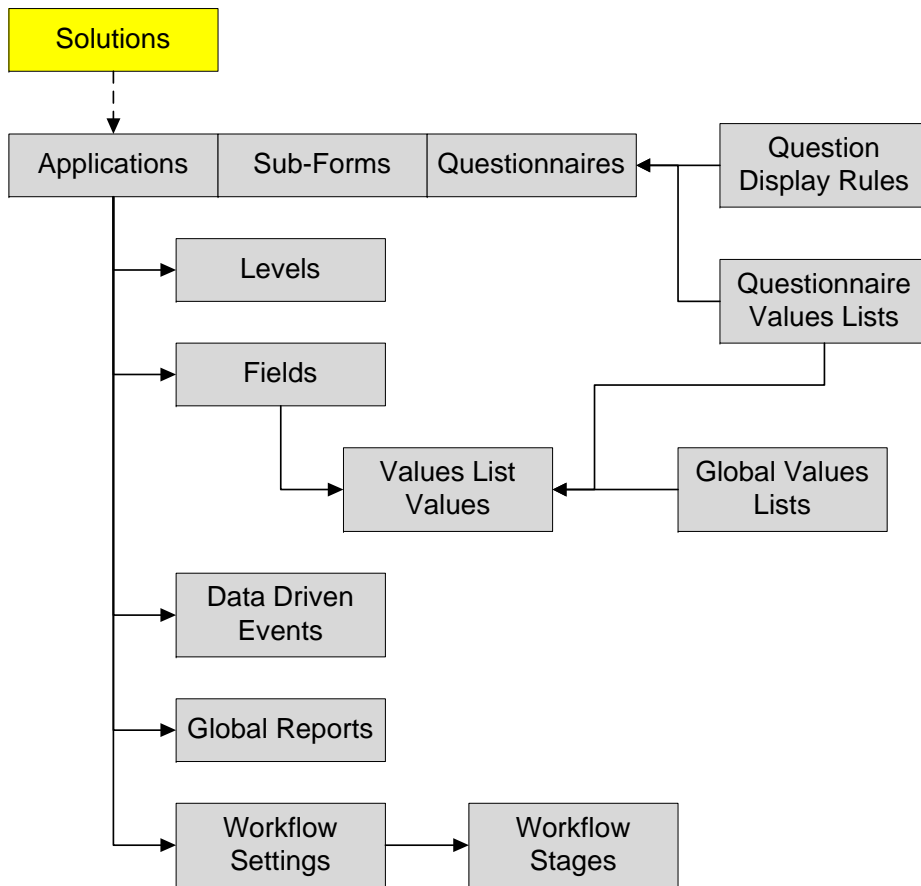
5x Options

- Combine multiple applications into one download/upload
- Questionnaires included
- User/Group selections and definitions included
- Creates new objects OR updates existing objects

Packaging Supported Entities

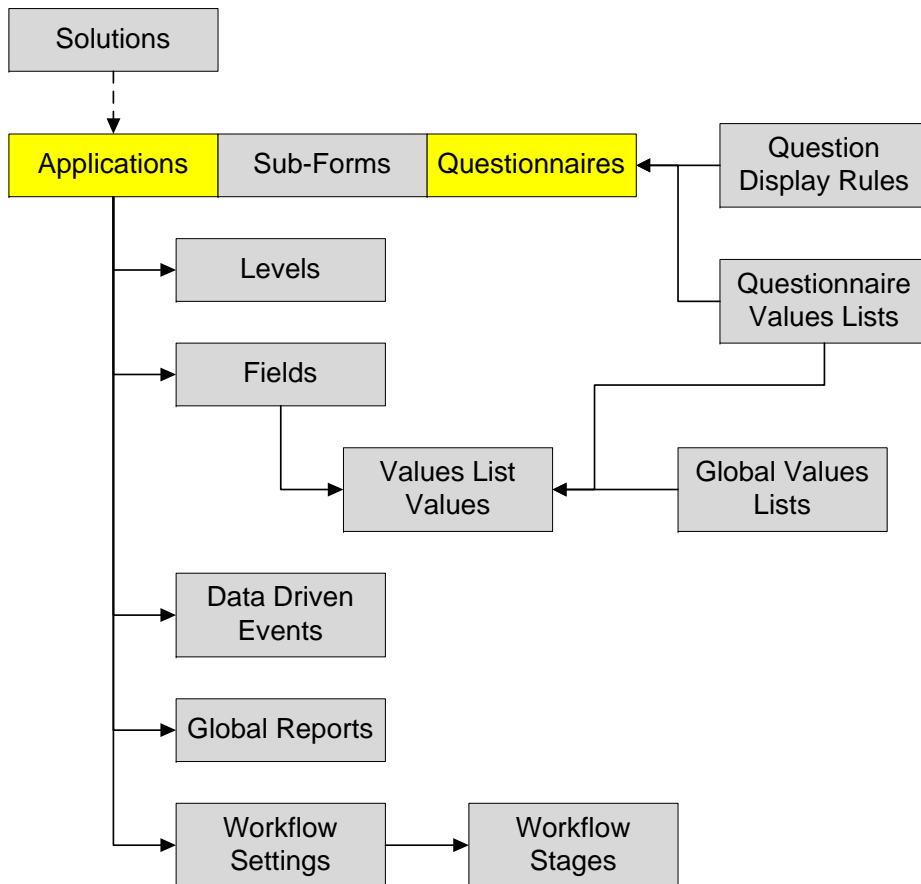


Packaging Supported Entities



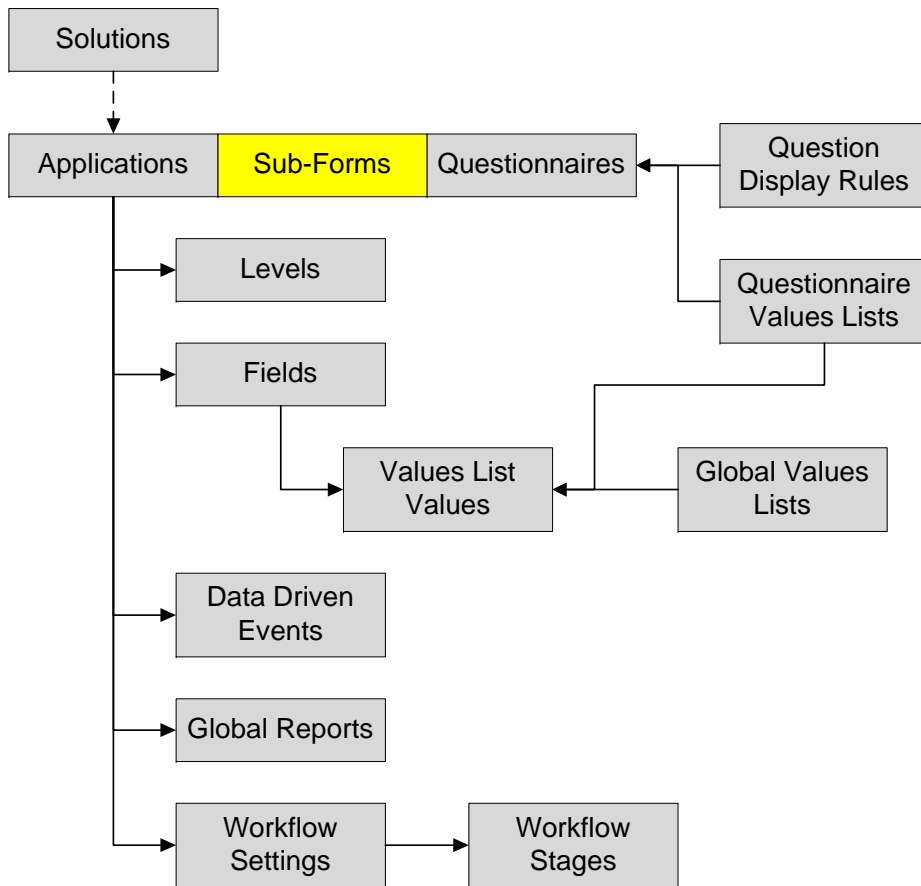
- New Solution(s) will not be created
- Applications/ Questionnaires will retain their solution relationships
- New Applications/ Questionnaires will be associated with their Solution(s) if they exist in the target system

Packaging Supported Entities



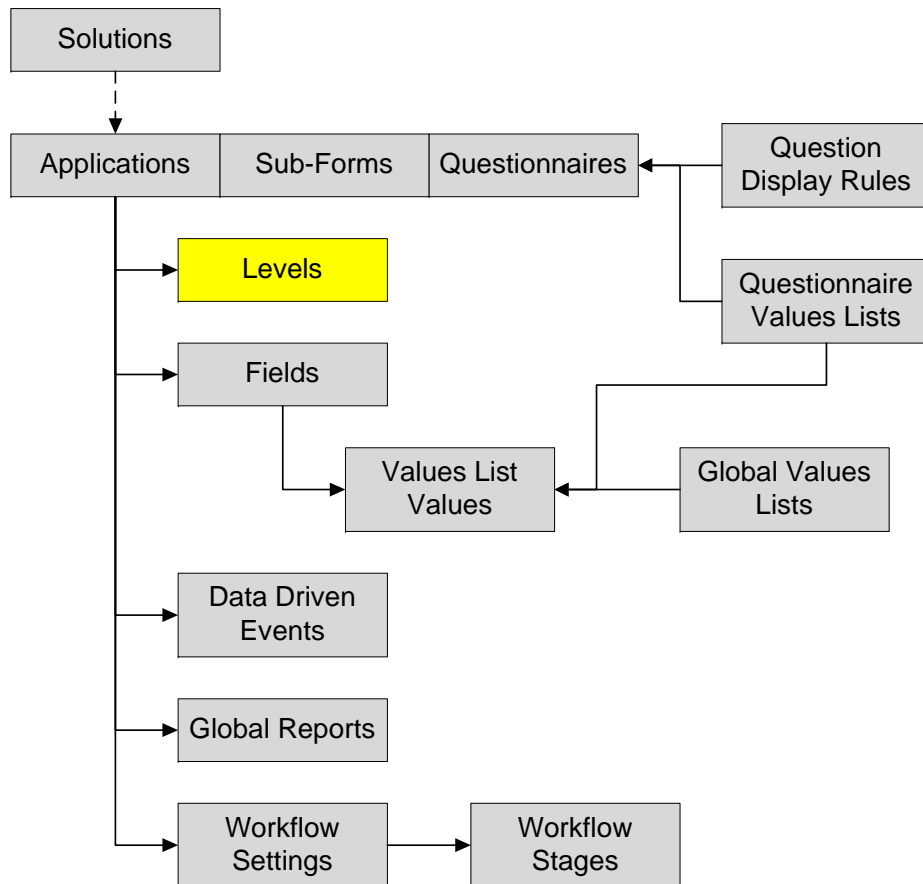
- Multiple Applications and Questionnaires can be included in a single package
- Administrators choose which Applications and Questionnaires to install during the Package installation

Packaging Supported Entities



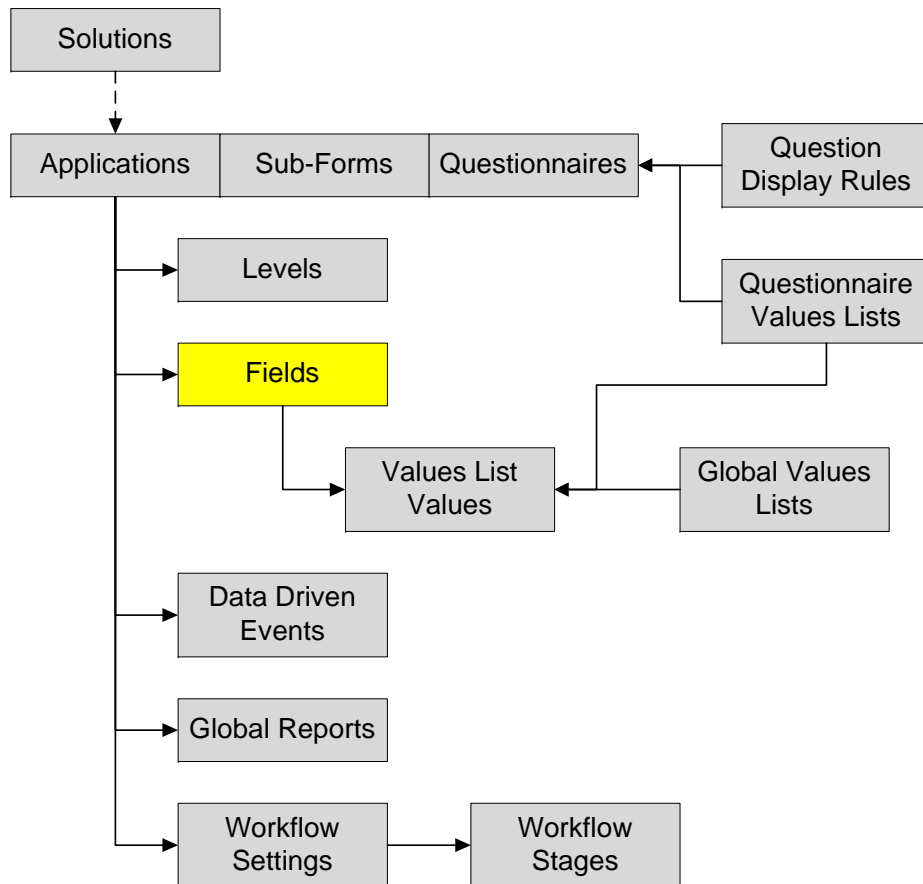
- Sub-Forms are only included if they are referenced by a Sub-Form field in an included Application/ Questionnaire

Packaging Supported Entities



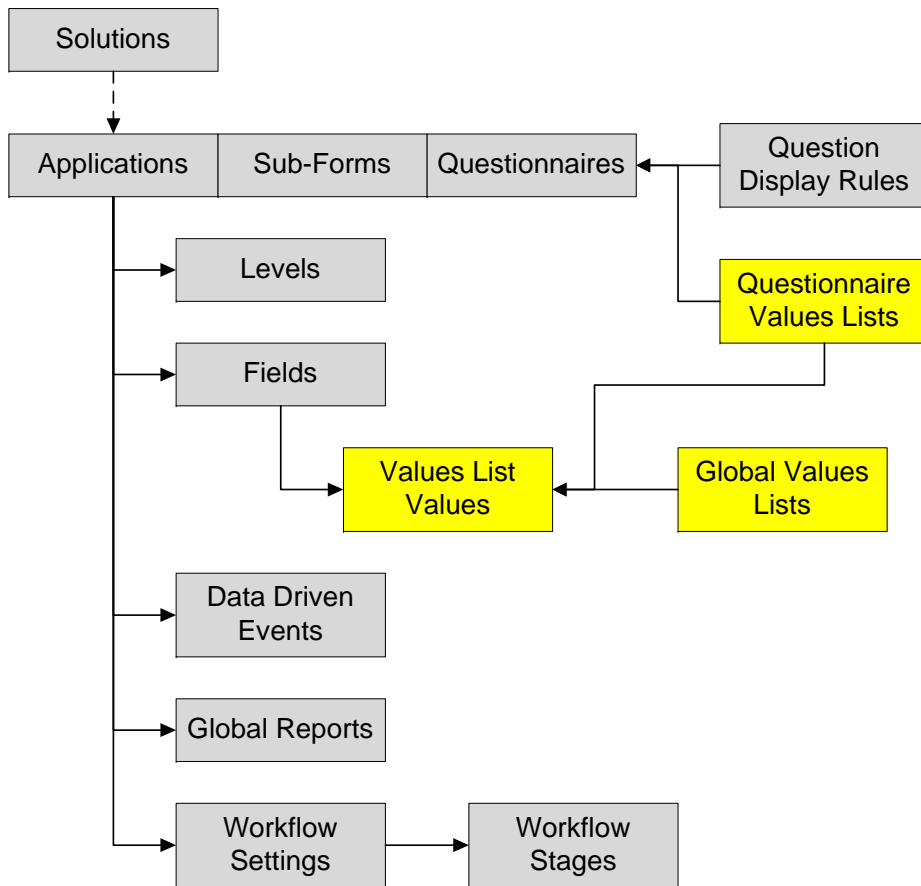
- For Leveled Applications, the Levels are included in the Package
- If the Package contains more Levels than the target Application, new Levels are created
- If the Application is missing intermediate Levels, an error is logged and the Application is not installed

Packaging Supported Entities



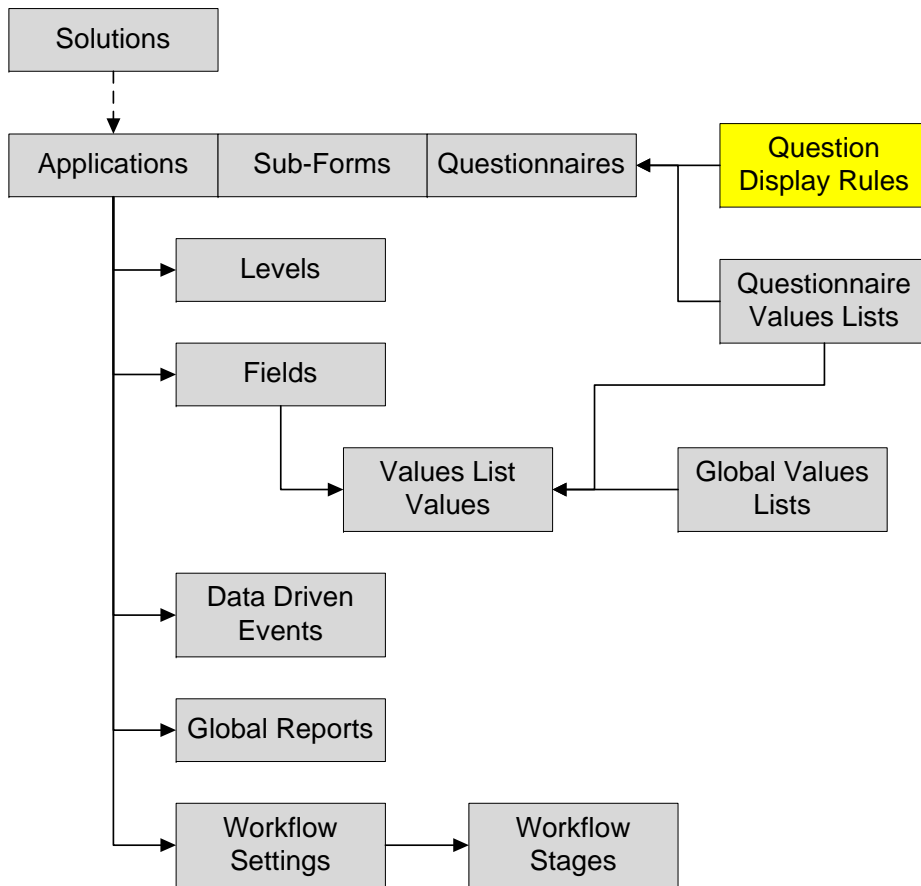
- All fields from the Applications and Questionnaires are included in the Package
- New fields will be created and existing fields will be updated (required, search results, formulas, etc.)
- Key field property will not transfer

Packaging Supported Entities



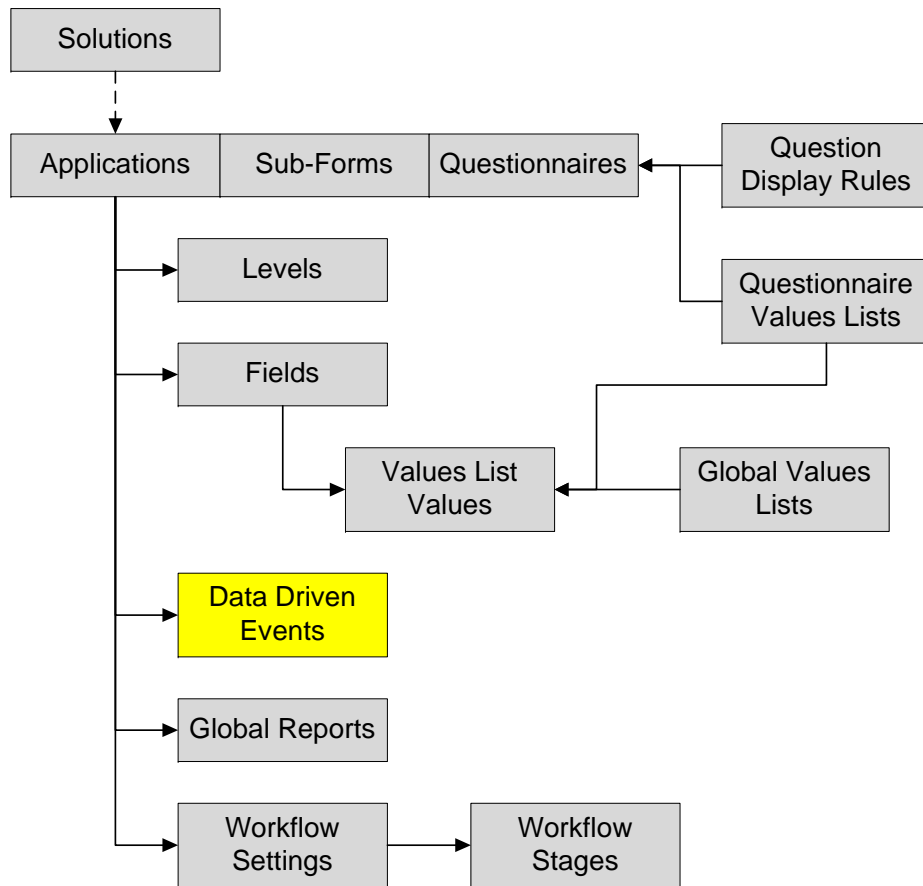
- Values List fields and values within the list associated with the fields are included in the Package
- Includes field-specific, Questionnaire and Global Values List
- For Custom Ordered lists, new values are added to the bottom of the list

Packaging Supported Entities



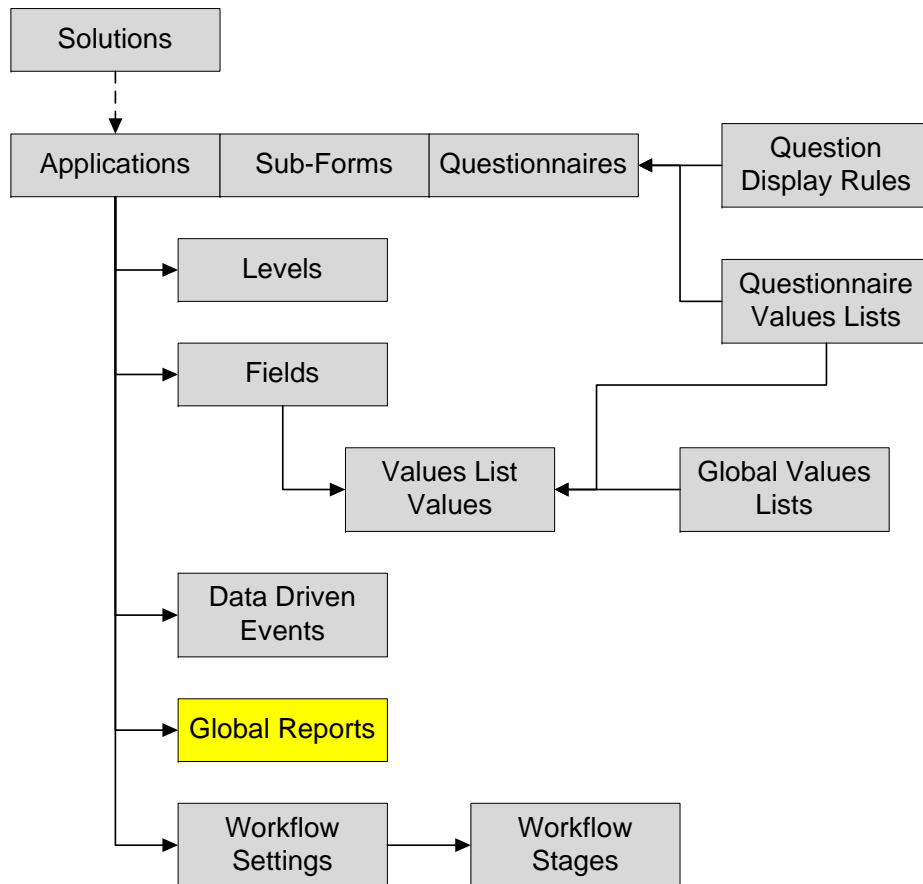
- Question Display Rules for Questionnaires are included in the Package

Packaging Supported Entities



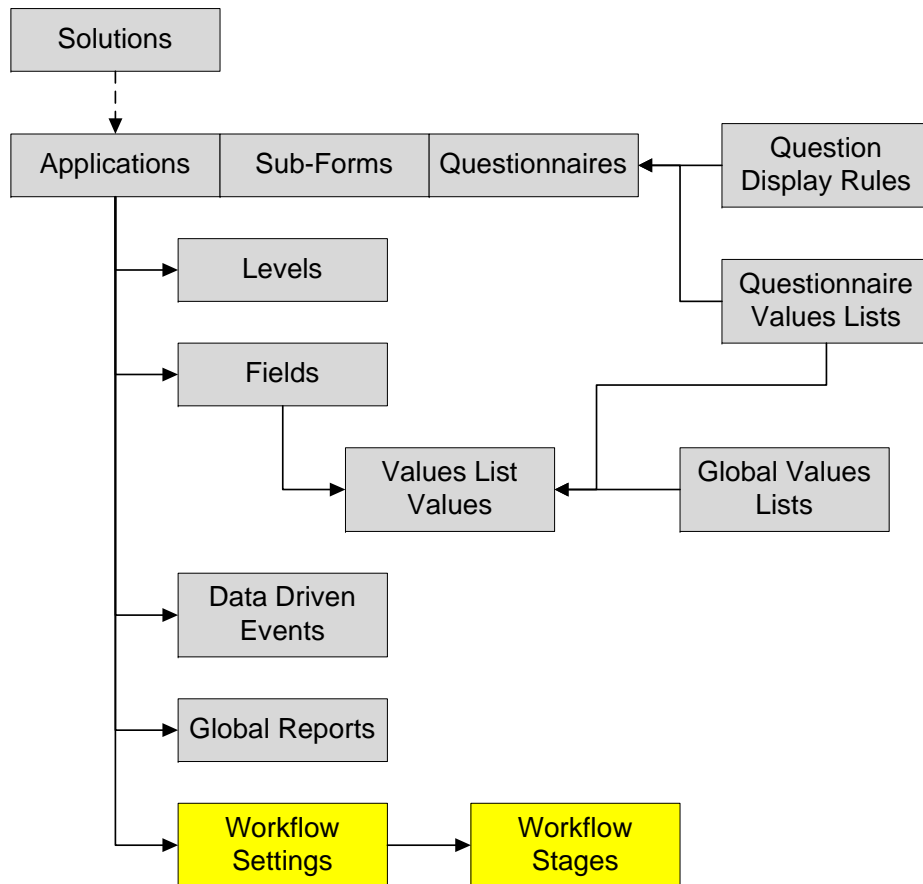
- Data Driven Event Rules and Actions are included in the Package
- **Exception:** Generate Notification Actions
- Also note, other notifications (built through the Notifications feature) are NOT included

Packaging Supported Entities



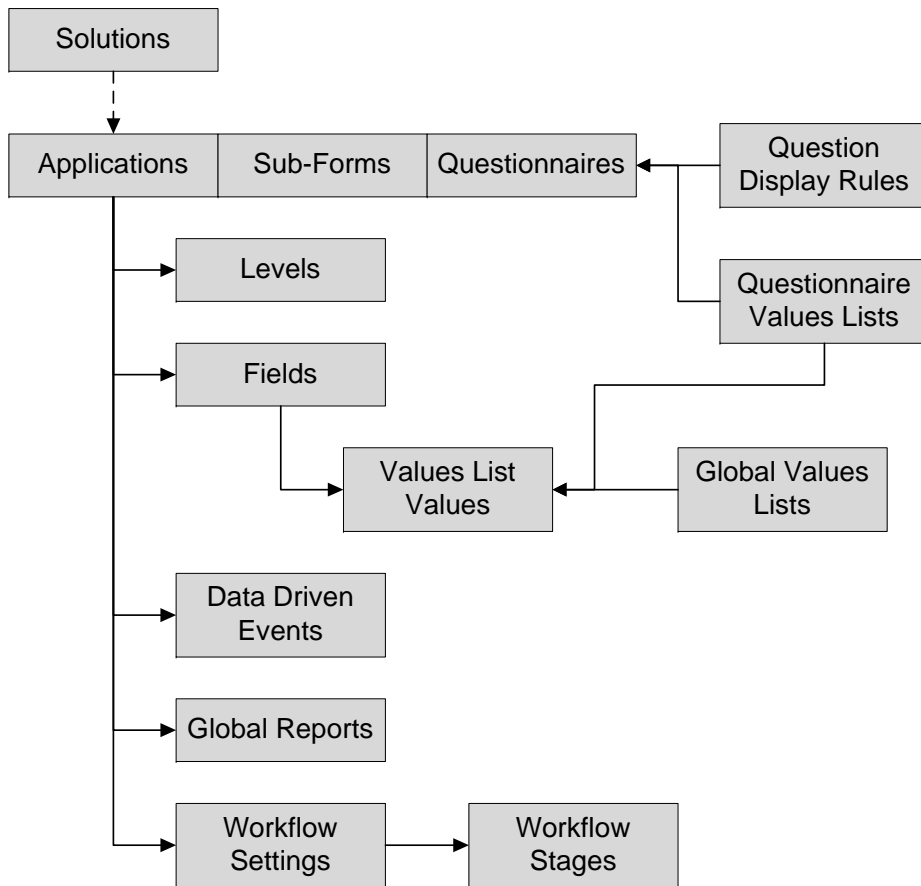
- All Global Reports defined for the Applications and Questionnaires are included in the Package
- **Tip:** Remember, global reports in the 5x universe automatically become single report iViews

Packaging Supported Entities



- Workflow Settings and the Associated Workflow Stages are included in the Package
- Workflow Stage Assignment Rules are also included
- No Workflow Notifications

Packaging Supported Entities



Even though data is not included in a package, you can still extract the records from an application.

Run an advanced search, select to display all fields and then export the results to .CSV.

Creating Packages

- Manage Packages feature included under Application Builder
- Select the application(s) to be included in the package
- Generate the package
 - Package will include the current state of the application(s)
 - Package will be generated as a .zip file



Installing Packages

- Upload .zip file into destination instance
- Select the applications to install
- Select options:
 - Create New Only
 - Create New and Update
 - Override Layout
 - Do Not Override Layout
- Package Installation Log maintains history and status of all installation attempts



Migration Considerations

1. Migrating Updates - Implications
2. Migrating User Definitions
3. Understanding Errors
4. Future Possibilities

Migrating Updates

- Many companies maintain separate development and production hardware
- Packaging makes it easy to roll updates from one environment to another
- Updates to applications may be tested on a non-production server and then transferred
- How does RSA Archer manage creates/updates?

Object Mapping - GUIDs

- RSA Archer references the object GUID to match items between the package and the destination environment.
- Globally Unique Identifiers – GUIDs
 - Applications, Questionnaires, Fields, Sub-Forms, etc.
- GUID match = update
- No GUID match = new object

Development

Widgets Application

GUID: 12345678-1234-1234-123456789



Development

Widgets Application

GUID: 12345678-1234-1234-123456789



Production

Widgets Application

GUID: 12345678-1234-1234-123456789



Update

Production

Widgets Application

GUID: 12345678-1234-1234-987654321



Migration Considerations - Synchronize

- Out of synch elements
 - Existing 4x implementations will have questionnaires with non-matching GUIDs
 - Fields added to an application after the initial import will also be out of synch from a GUID perspective
- To take advantage of the new Packaging features, you will need to “synch” your various RSA Archer environments
- Refresh your Test and Development environments with a scrubbed backup of Production to ensure consistency of GUIDs



User and Group Matching

1. IF LDAP, RSA Archer analyzes distinguished name
2. Review the domain/username combination
3. Review the user's Last, First, Middle name
4. No match, selection dropped

-
1. IF LDAP, RSA Archer analyzes distinguished name
 2. Group name
 - If two groups have the same name, the match is dropped. Must be a 1:1 relationship



Understanding Errors

- Packaging will generate a detailed log of the Package installation

Type of Error	Description
Critical Failure	<ul style="list-style-type: none">• Package Installation is cancelled; all package actions are rolled back• Failed app/questionnaire creation
Minor Failure	<ul style="list-style-type: none">• Failure to create or update a specific entity; review these items following the installation• Failed field updated, DDE creation, etc.
Warnings	<ul style="list-style-type: none">• Items remediated by the installation; review these items• Unable to locate a cross-referenced application, user or group did not exist

Future Planning Packaging

- Notifications – Standard, DDE and Workflow
- Access Roles
- Workspaces, Dashboards, iView (not personal)
- Ability to export Installation Errors report
- Mail Merge Templates





Upcoming Calendar

- Next Week's Session
- New Time
- Migration Discussion Board

Final Thoughts

- A recording of today's User Group Training session will be available for viewing within the Archer Community site:
 - Migration Discussion Forum

- Next week's topic:
 - August 26
Searching and Reporting

5x Migration Working Group		
Thread	Replies	
 Week 3: Migrating Notifications, Part I Last Post by Jonathan Kitchin , 08-11-2011 3:10 PM	4	<input type="checkbox"/>
 Week 2: Migrating Calculations Last Post by Jonathan Kitchin , 08-01-2011 1:11 PM	2	<input type="checkbox"/>
 Week 1: Migrating Data-Driven Events Last Post by Jonathan Kitchin , 07-13-2011 2:51 PM	0	<input type="checkbox"/>
 5.0 Migration Working Group - Kickoff Call  Last Post by Jonathan Kitchin , 07-11-2011 11:23 AM	2	<input type="checkbox"/>
 Welcome to the 5.0 Migration Working Group Last Post by Jonathan Valina , 06-24-2011 12:36 PM	1	<input type="checkbox"/>

THANK YOU

