



# **Immune Systems**

## **Module Installation Guide**

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### Revision History

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XX Aug 2023	Release of AFA Module Installation guide

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## Introduction to Immune Modules

Immune modules are special types of packages, usually developed by Wolters Kluwer or an authorized vendor, containing extended features and enhanced functionality. Customers can purchase individual modules and use them to extend their standard Immune Matter and Spend Management application.

Modules are delivered as packages containing new objects, pages, and business logic that are added to the base application. Modules are generally available to Immune customers and include feature sets such as the Immune Accruals Collaboration Module. Modules do not modify the base Immune functionality.

For more information about installing a new module package or upgrading a module version, refer to [Installing an Immune Module](#).

## Overview

The installation guide provides a comprehensive list of what you must do to install the Immune Accruals Collaboration Module successfully.

If you are installing the module for the first time or you are installing an upgrade from a previous version, you will perform a Full Installation.

For more information, refer to [Installing an Immune Module](#).

## Installing an Immune Module

This section provides instructions for installing the Immune Accruals Collaboration Module. Use these instructions if you are installing the module for the first time or you are installing an upgrade from an earlier version of the module.

### Prerequisites

To install the module, you must comply with the following prerequisites:

- You must log in to Immune as a user with Administrator access.
- You must have a working installation of Immune.

For more information about certified Immune releases, refer to the [Immune Accruals Collaboration Module](#).

### Release Notes

- You must install the Immune Collaboration Management Module bundle first. Proper functioning of the Immune Accruals Collaboration Module depends on the Immune Collaboration Management Module bundle. For more information, refer to the [Immune Collaboration Management Module Release Notes](#).
- If you want to install this module into an Immune environment where the High Availability Option is installed, you must install the bundle on the master server only. For more information about installing bundles with the High Availability Option, refer to the [Installing Additional Packages section in the Immune High Availability Option Guide](#).
- If you are installing the Accruals Collaboration Module for the first time and you want to enable person level security, you must install a data package that switches the security type. For more information, refer to [Enabling Person-Level Security Features for the Immune Accruals Collaboration Module](#).
- If you want to install the Accruals Collaboration Module Report Pack, you must ensure that your Immune environment meets certain requirements to support this product. For more information, refer to the [Immune Data Warehouse Report Pack for Accruals Collaboration Module Release Notes](#).

### Installation Overview

The following overview summarizes the steps that you must complete to install a new version of an Immune module:

1. Complete all pre-installation steps. For more information, refer to [Pre-Installation Steps](#).
2. If you are installing a new module or upgrading an existing module, you must import and install the bundle. For more information, refer to [Importing the Immune Module Bundle and Installing the Immune Module Bundle](#).
3. Complete all post-installation steps. For more information, refer to [Post-Installation Steps](#).

4. If an Immune client has enabled person-level security for Interactive Collaboration when installing the Immune Collaboration Management Module, enable person-level security for the Accruals Collaboration Module. For more information, refer to [Enabling Person-Level Security Features for the Immune Accruals Collaboration Module](#).

## Pre-Installation Steps

Before installing a new version of the module, perform the following steps:

5. Verify that your current installation is the correct Immune version. In the Administration application, click **MENU** and under the **APPLICATION SETTINGS** category, select **System Information**.
6. The Framework Version indicates the version of your current Immune installation and the build number (version.buildnumber).
7. Stop the following services:
  - Apache Tomcat Immune
  - Apache-Immune
8. If legacy OMA is installed, stop the following services:
  - ObjectBroker
  - MessageClient
  - TaskService
9. Back up the Immune database.
10. Start the following services:
  - Apache Tomcat Immune
  - Apache-Immune
11. As a best practice, create an Immune snapshot of your current Immune configuration.
12. For more information about working with snapshots, refer to [topics in the Immune Designer Help](#).
13. Locate the Immune module installation files that are provided by Wolters Kluwer.

## Importing the Immune Module Bundle

You import a bundle to install module functionality and configuration, including the required menus, objects, pages, commands, scheduled jobs, and other necessary components. For more information about managing bundles, refer to [Immune Designer Help](#).

To import the Immune module bundle for a new or upgrade installation, perform the following steps:

14. Log in to Immune as a user with Administrator access.
15. To import the module bundle into the system, perform the following steps:

- In the Administration application, click **MENU** and under the **PACKAGING** category, select **Bundles**.
- Click **Upload**. The Upload drop-down form is displayed.
- Under **File**, click Select **file**.
- Navigate to the release location, and select the following bundle file:  
*accruals-collaboration-module-VersionNumber.bundle*
- Click **Open**.
- Click **UPLOAD**.

Immune imports the bundle file that is displayed on the Bundles list page.

## Installing the Immune Module Bundle

After you import the bundle, you must install the bundle's contents.

To install the Immune module bundle for a new or upgrade installation, perform the following steps:

16. In the Administration application, click **MENU** and under the **PACKAGING** category, select Bundles.
17. The Bundles page is displayed, showing a list of available bundles.
18. On the Bundles list page, click **accruals-collaboration-module** to install the module bundle file.
19. The Bundle Details summary page is displayed.

### 20. NOTE:

21. This page displays bundle details, contents, and dependencies for the Immune Accruals Collaboration Module bundle.
22. Review the bundle details, contents, and dependencies.

The following table lists the packages that are included in the accruals-collaboration-module VersionNumber.bundle file. You can find this list of packages in the Contents section.

Package Name	Description
MC-24712 RTD_defectfix_persontype_change_ tk_history.cpf	Contains a fix that resolves Timekeeper Rate Classification RTD issue, when changing person type from "external other" to "external timekeeper" and saved in the Organizations >Person and Person >Organizations tabs.
MC-24819- Primary_Accrual_Reviewer_Fix.cpf	Contains a fix that resolves an issue in viewing Primary Accrual Reviewer check box in Organization>Person and Person>Organization List Item pages.



Module Guide	Adds the Immune Accruals Collaboration Module.
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**NOTE:**

- If you are upgrading your current installation of the Immune Accruals Collaboration Module, the Include in Bundle column in the Dependencies section displays "No" for the previous version of the module.
- If you are performing a new installation, any dependencies required by this version of the module are included in the bundle file.

23. Click **Install**.

24. While Immune is installing the bundle components, the following notice is displayed.

25. When bundle installation is complete, the Immune login page is displayed, stating that the system update is complete.

26. Restart the **Apache Tomcat Passport** service.

27. Continue the installation process by performing post-installation steps in the next section.

**Post-Installation Steps**

After you install the Immune bundle, perform the following steps to verify the immune module installation:

28. Log in to Passport as a user with Administrator access.

29. Verify that the following packages were installed successfully.

The following table lists the packages installed by the Immune Accruals Collaboration Module bundle.

Order Number	Package Name
1	MC-24712 RTD_defectfix_persontype_change_tk_history.cpf
2	MC-24819-Primary_Accrual_Reviewer_Fix.cpf
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30. In the Administration application, click MENU and under the PACKAGING category, click Bundles.

31. In the Bundles list, verify that all bundles are in the list with an expected Last Imported At date and time.

32. **IMPORTANT:**

33. No Rollback after this point.

34. Ensure that you want to retain the installed module before proceeding.

35. To disable validators, perform the following steps:

- In the Designer application, click **MENU** and under the **DESIGNER SETTINGS** category, click **Designer Settings**.

The Designer Settings page is displayed.

- In the Disabled Validator(s) field, add the following text.

If the field already contains validators, add a comma to separate them from the new ones for the Passport Accruals Collaboration.

com.datacert.apps.mattermanagement.presentation.model.impl.MatterAccrualValidator,com.datacert.apps.mattermanagement.presentation.model.impl.MatterAccrualErrorValidator,com.datacert.apps.mattermanagement.presentation.model.OrganizationValidator

- Click **SAVE**.

36. Execute the Reset Workflow Template for Workflow Object scheduled job, by performing the following steps:

- In the Administration application, click **MENU** and, under the **APPLICATION SETTINGS** category, select **Scheduled Jobs**.  
The Schedule Jobs page is displayed.
- Select the check box next to the Reset Workflow Template for Workflow Object scheduled job.
- If the scheduled job is in Suspended status, click **Execute Job**.
- If the scheduled job is in Active status, click **Suspend** and then click **Execute Job**.

37. If you are installing the module for the first time, perform the following steps:

- Review any new roles that were added by the module, and create groups to make use of the roles.

For more information, refer to the [Passport Accruals Collaboration Module Guide](#).

38. If legacy OMA is installed, start the following services:

- ObjectBroker
- MessageClient
- TaskService