

IBM OPENPAGES GRC PLATFORM
VERSION 7.4

Reverse AFCON 7.4

Reverse Automated Forms Configuration User Manual



NOTE

Before using this information and the product it supports, read the information in *Appendix C: Notices* of this document.

Author	Modified	Comments
Julia Reynolds	4/17/2008	Initial Version
Julia Reynolds	7/25/2008	Added Home Page and Computed Fields sections
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Product Information

This document applies to IBM OpenPages GRC Platform 7.4 and may also apply to subsequent releases.

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I. What is Reverse AFCON?

Reverse AFCON stands for Reverse Automated Forms Configuration, and was designed to be used as an efficient way of reconstructing an AFCON template from a live system. Reverse AFCON reads OP-XML files extracted using ObjectManager and creates a Microsoft® Excel® template in a format that AFCON can process.

Reverse AFCON is a standalone Java program developed in Java™ 1.8. Later versions of Java have not been tested, and it is recommended to use 64-bit Java™ 1.8 each time Reverse AFCON is used.

Reverse AFCON 7.4 may be used to generate AFCON templates for OpenPages 7.4+.

II. What's New in this Release?

Reverse AFCON 7.1:

- a. Reverse AFCON now supports Field Level Security Rules.
- b. Reverse AFCON now supports Encryption.
- c. Properties files have been updated to include all field level security default attributes and new encryption attribute for a field.

Reverse AFCON 7.2:

- a. Reverse AFCON now supports Global Search
- b. Reverse AFCON now supports Creation Views
- c. Reverse AFCON now supports Read-Only in Filtered List View

Reverse AFCON 7.2.0.2:

- a. Reverse AFCON now supports Field Type Properties
- b. Reverse AFCON now supports Business Entity Selector

Reverse AFCON 7.3:

- a. Reverse AFCON now supports configuration for Dashboard home page.
- b. Reverse AFCON now supports configuration for Business Process Portal home page.

Reverse AFCON 7.3.0.1:

- a. Reverse AFCON now supports Classifier field type.
- b. Reverse AFCON now supports Classifier worksheet.

Reverse AFCON 7.4:

- a. Reverse AFCON now supports Java 8.
- b. Reverse AFCON now supports a new computation handler attribute called "Package Name".
- c. Added Enumeration worksheet support.

III. The Reverse AFCON Schema Template

Reverse AFCON creates an AFCON schema template that contains a series of worksheets used to capture requirements about various aspects of UI configuration.

a. The *INSTRUCTIONS* Worksheet

The first worksheet in the schema template is the *INSTRUCTIONS* worksheet (see Figure III.a below), which contains general information about the template.

AFCON 7.4	
Customer Name:	OpenPagesModules
Managing Consultant:	OpenPagesModules
Customer Abbreviation:	OpenPagesModules
Number of Entity Levels:	5
Base Currency Code:	USD
FastMap Date Format:	MM/dd/yyyy
Profile Name:	OpenPages Modules 7.4.0 Master
Fallback Profile:	false
Default Profile:	false

Template v7.4

Figure III.a: The *INSTRUCTIONS* worksheet.

NOTE: Reverse AFCON will automatically populate only the “Profile Name”, “Fallback Profile”, and “Default Profile” fields. The remaining information must be entered manually for use with AFCON.

b. The Object Type Worksheets

Next is a series of worksheets that contain information about objects that are included in the Object Profile you have extracted. The forms for all these objects can be configured using AFCON. The ‘Data Entry Encrypted’ column specifies if the value of a field is encrypted in database.

	A	B	N	Z	AA	AB	AC	AD	AP	AQ	AR	AS	AT	AU	AV	AW	AX	AY	AZ	BA	BB
1	Field Group	Field Name	Field Description	Field Type	Field Type Properties	Read-Only in Detail	Read-Only in Filtered	Possible Values	Default	Data Entry Required	Data Entry Encrypte	Span Columns	Include in Detail View	Include in List View	Include in Folder View	Include in Filtered	Include in Context	Include in Home Page	Is Dimension	Is Fact	Global Search
2	Section	General Info	The name of this object.	Text Box	maxLength=4000 columns=30	No	No		No	No	No	Yes	No	No	No	No	No	No	No	No	No
3	System Fields	Name	Descripti or edit a description	Text Area	rows=5	No	No		Yes	No	No	Yes	Yes	Yes	Yes	Yes	No	No	No	No	No
4	System Fields	Description	Use to assign a	User Selector	includeSubGroups=true	No	No		No	No	No	Yes	Yes	Yes	Yes	Yes	No	No	No	No	No
5	OPSS-LossEv	Owner	Outcome What Happened	Radio	columns=60 rows=5	No	No	Near	No	No	No	Yes	No	No	No	No	No	No	No	No	Yes
6	OPSS-LossEv	Opss-LossEv d	Use to enter or edit a description	Text Area	columns=60 rows=5	No	No		No	No	Yes	Yes	No	No	No	No	No	No	No	No	Yes
7	OPSS-LossEv	Your Contact		Text Area	maxLength=4000 columns=30	No	No		No	No	Yes	Yes	No	No	No	No	No	No	No	No	Yes
8	Section	OPSS-LE-Contact	Your Name	Text Box	maxLength=4000 columns=30	No	No		No	No	No	Yes	No	No	No	No	No	No	No	No	No
9	OPSS-LE-Contact	Your Phone		Text Box	maxLength=4000 columns=30	No	No		No	No	No	Yes	No	No	No	No	No	No	No	No	Yes
10	OPSS-LE-Contact	Your Email		Text Box	maxLength=4000 columns=30	No	No		No	No	No	Yes	No	No	No	No	No	No	No	No	Yes
11	OPSS-LE-Contact	Info Yours Status	indicate if you are	Drop Down		No	No	No	Yes	No	No	No	Yes	No	No	No	No	No	No	No	Yes
12	OPSS-LE-Contact	Yours Status		Radio		No	No		No	No	No	Yes	No	No	No	No	No	No	No	No	Yes

Figure IV.a: Object Type Worksheet

c. The Computed Fields Worksheet

The *Computed Fields* worksheet defines the computed field formulas for all computed fields included in the profile.

d. The Reporting Fragments Worksheet

The *Reporting Fragments* worksheet defines the report fragment definitions for all report fragment fields included in this profile.

e. The Classifier Worksheet

The Classifier worksheet defines the classifier field definitions for all the fields included in the profile.

f. The Filters Worksheet

The *Filters* worksheet displays the available filters in the system for each object type, and specifies whether each filter should be visible in the profile represented by this worksheet. The information on this tab is global except for the “Include In...” columns, which are profile-specific.

g. The Activity View Worksheets

Next is a series of worksheets that contain information about activity views. If there are no activity views defined for a profile, no worksheets of this type will be created. Each worksheet specifies the information needed to create one activity view in the application. The worksheet names begin with “AV - ”.

h. The Grid View Worksheets

Next is a series of worksheets that contain information about grid views. Each worksheet specifies the information needed to create one grid view in the application. The worksheet names begin with “GV - ”.

i. **The Creation View Worksheets**

Next is a series of worksheets that contain information about creation views. Each worksheet specifies the information needed to create one creation view in the application. The worksheet names begin with "CV -".

j. **The Dependent Picklists Worksheet**

The *Dependent Picklists* worksheet defines dependent picklists for the system. With this worksheet you can configure a list of items (drop-down or list box) so that the items in the list are dynamically filtered based upon some value selected by a user in another list. The dynamic filtering of lists can be used to help guide users in the selection of relevant values from lists during the creation or editing of an object.

This worksheet is global, not profile specific.

k. **The Enumerations Worksheet**

The *Enumerations* worksheet defines enumerations for the system. In this worksheet you can configure hierarchical fields that are defined in the system. Also some multi-select fields can have their values defined in this worksheet.

This worksheet is global, not profile specific.

l. **The Dependencies Worksheet**

The *Dependencies* worksheet defines field dependencies for the system. With this worksheet, you can configure a field so that its behavior - Visible, Editable, or Required - is dynamic based upon some value(s) selected by a user in another field or set of fields. The dynamic behavior of dependent fields can be used to help guide users during the creation or editing of an object.

This worksheet is global, not profile specific.

m. **The Field Exclusions Worksheet**

The *Field Exclusions* worksheet defines field exclusions for the system. With this worksheet, you can configure a field so that it does or does not appear in certain 'subsystems'. The 'subsystems' supported at this time are Workflow and the Reporting Framework.

This worksheet is global, not profile specific.

n. **The Labels – Object Types Worksheet**

The worksheet *Labels – Object Types* allows the user to enter locale-specific labels for each locale in OpenPages. Each locale has a column in this worksheet; the text entered in the locale column is the display label of the relevant object type for that locale.

o. **The Home Page Tabs Worksheet**

The *Home Page Tabs* worksheet defines what tabs should appear on the home page and what order they should appear in. These tabs can be the Classic Home Page, Report (JSP, CommandCenter etc.), Dashboard or Business Process Portal. The ordering of the rows on this sheet will match the ordering of tabs of the home page.

p. **The Classic Home Page Worksheet**

The *Classic Home Page* worksheet defines what reports or predefined filters will appear on the Classic Home Page for a given profile. This tab can be blank if the Classic Home Page is disabled on the

previous tab. Reports can either be *Embedded*, which means that the report will run and display on the home page each time it is viewed, or *Listing*, which means the report will display as a link.

q. **The Default Views Worksheet**

The *Default Views* worksheet defines what the default navigational, object and creation views are for each object type visible in a profile.

r. **The Overviews Worksheet**

The *Overviews* worksheet defines the overviews for each object type.

s. **The Recursive Object Levels Worksheet**

The *Recursive Object Levels* worksheet defines hierarchies for recursive object types for the reporting framework.

t. **The Object Type Dimensions Worksheet**

The *Object Type Dimensions* worksheet represents the object type hierarchy dimensions for the reporting framework.

u. **The Date Dimension Types Worksheet**

The *Date Dimension Types* worksheet represents the date dimension types that you can associate to fields on the *Date Dimension Associations* worksheet. This information is used in the reporting framework.

v. **The Date Dimension Associations Worksheet**

The *Date Dimension Associations* worksheet represents associations between date dimension types and fields. A field can be associated to zero or more date dimension types. This information is used in the reporting framework.

w. **The Security Rules Worksheet**

The *Security Rules* worksheet represents the rules that implement the Record Level Security feature.

x. **The Field Level Security Rules Worksheet**

The *Field Level Security Rules* worksheet represents the rules that implement the new Field Level Security feature.

y. **The Navigational Views Order Worksheet**

The *Navigational Views Order* worksheet represents the new ordering for Navigational Views. Navigational views orders include Folder, Filtered List and Grid Views.

z. **The Object Views Order Worksheet**

The *Object Views Order* worksheet represents the new ordering for Object Views. Object Views orders include Detail and Activity Views.

IV. Using Reverse AFCON

a. Creating the Input schema XML file

Reverse AFCON requires an XML file that contains the state of your current configuration.

Instructions:

1. On the application machine, navigate to:
<OP drive>:\OpenPages\bin
2. Edit the file ObjectManager.properties in Notepad
3. Update the setting:
configuration.manager.migrate.configuration.objects = true
4. Save the file
5. Open a command prompt and navigate to:
<OP drive>:\OpenPages\bin
6. At the prompt, type on one line:
ObjectManager d c OpenPagesAdministrator <OpenPagesAdministrator password>
<path to file> <file name to create>

e.g. ObjectManager d c OpenPagesAdministrator OpenPagesAdministrator
"C:\Reverse AFCON" current-schema

Optional

If the file created with the above steps is too large, the following changes can be made to ObjectManager.properties in lieu of the changes listed in step 3:

```
configuration.manager.migrate.configuration.objects = false
```

Set the following to true (and everything else like configuration.manager.dump.* to false):

```
configuration.manager.dump.bundle.types=true
configuration.manager.dump.file.upload.content.types=true
configuration.manager.dump.jsp_based.content.types=true
configuration.manager.dump.admin.objectprofile.views=true
configuration.manager.dump.form_based.content.types=true
configuration.manager.dump.object.profiles=true
configuration.manager.dump.application.strings=true
configuration.manager.dump.object.strings=true
configuration.manager.dump.query.definitions=true
configuration.manager.dump.field.dependency=true
configuration.manager.dump.field.dependency.picklist=true
configuration.manager.dump.recursive.hierarchy=true
configuration.manager.dump.date.dimension.type=true
configuration.manager.dump.object.type.dimension=true
configuration.manager.dump.date.dimension.type.associations=true
configuration.manager.dump.recursive.hierarchy.strings=true
configuration.manager.dump.date.dimension.type.strings=true
configuration.manager.dump.object.type.dimension.strings=true
configuration.manager.dump.subsystem.exclusion.fields=true
```

Note: The file created by ObjectManager will have the text "-op-config" appended to the name specified in step 6. The file extension will be "xml".

b. **Starting Reverse AFCON**

To run Reverse AFCON, extract the Reverse AFCON zip file to your machine and double-click RAFCON.exe.

The window shown in Figure IV.b.1 will then appear. Follow the instructions on the next page to complete the forms configuration.

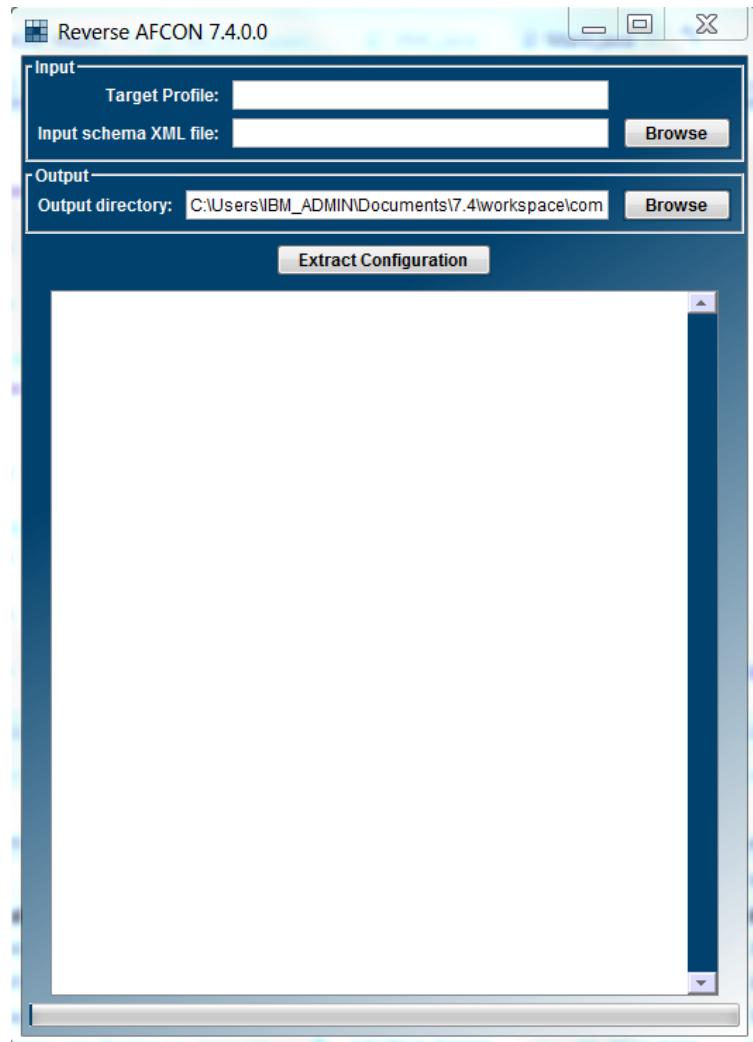


Figure V.b.1 The Reverse AFCON user interface.

Instructions:

1. **Input:**

- In the **Target Profile** text box, type the name(s) of the Object Profile(s) you would like to extract into an AFCON template, in a comma separated list. If you want to extract all profiles, type “**ALL**”.
- In the **Input schema XML file** text box, browse to or type the name of file created in section IV.a above.

2. **Output:**

- In the **Output directory** text box, browse to or type the name of the directory in which the output files should be created. The value for this field is initially set to the directory from which Reverse AFCON is run.

3. **Complete Forms Configuration**

- Click the button to execute Reverse AFCON.

c. **Notes and Errors**

During execution, you may see notes and errors displayed. These messages will appear in the text area at the bottom of the window.

A note is preceded by the word “NOTE” and an error is preceded by the word “ERROR”. Notes often serve as warnings that the schema template may not have been properly completed. Errors, however, must be addressed before Reverse AFCON can create a valid output file.

When an error occurs, the interface will turn red. If the window stays blue, then the output files were successfully created. However, even if you receive only notes (and no errors), it is suggested that you review them all.

All errors will explain the nature of the problem, and will direct the user to any relevant properties files.

Known Error: RAFCON adds a SingleFile field to QuestionTemplate worksheet which is only for internal use for workflow jobs and cannot be added to the profile. AFCON tool does not support SingleFile field type and may throw errors, in which case remove the complete row for SingleType field and run the tool again.

See *Appendix B. Notes and Errors Glossary* for more information.

d. **Understanding the Output Files**

After successful execution of Reverse AFCON one or more Excel AFCON templates will be created in the output directory; one per profile specified in the “Target Profile” field. These files can be updated (to add, update, or remove fields) and processed by the AFCON utility.

Appendix A: Configurable Properties

Reverse AFCON uses two properties files, both of which are expected to be in the *properties* folder of the directory from which Reverse AFCON is run.

1. **contentType.properties** – contains a mapping of content type names to the labels Reverse AFCON understands for worksheet names, Object Type columns, and the Labels and Overview worksheets.
2. **general.properties** – contains general properties related to Reverse AFCON:
 - a. input.AFCON.template – the name of an Excel spreadsheet (with path relative to Reverse AFCON\input) to be used as the basis for the AFCON template.
 - b. output.file.format – The format of the input AFCON template. This can be xls or xlsx.
 - c. locale – locale in which Reverse AFCON should run (governs UI text and error messages/notes)
 - d. font.X - specific fonts for each language (country-independent). If not specified, 12pt Dialog will be used.
 - e. suppress.hidden.fields – Determines whether or not fields that are not visible in at least one view of a profile should be included in the AFCON template for that profile. Value should be "true" to suppress these fields, and "false" otherwise.
 - f. suppress.unrelated.filters - Determines whether or not filters that are not included in the Filtered List, Activity, or Home Page views of a profile should be included in the AFCON template for that profile. Value should be "false" to include all filters in the system and "true" to include only those used by that profile.
 - g. suppress.unrelated.picklists - Determines whether or not dependent picklists for fields that are not included in any views of a profile should be included in the AFCON template for that profile. Value should be "false" to include all picklists in the system and "true" to include only those used by that profile.
 - h. suppress.unrelated.dependencies - Determines whether or not dependencies for fields that are not included in any views of a profile should be included in the AFCON template for that profile. Value should be "false" to include all dependencies in the system and "true" to include only those used by that profile.
 - i. suppress.unrelated.subsystem.exclusions – Determines whether or not field exclusions for fields that are not included in any view of a profile should be included in the AFCON template for that profile. Value should be "false" to include all field exclusions and "true" to include only those used by that profile.

Appendix B: Notes and Errors Glossary

Known Error: RAFCON adds a SingleFile field to QuestionTemplate worksheet which is only for internal use for workflow jobs and cannot be added to the profile. AFCON tool does not support SingleFile field type and may throw errors, in which case remove the complete row for SingleType field and run the tool again.

Code	Category	Message	Explanation
AG-001	Fatal Error	The following exception occurred: [exception trace]	A general exception occurred during execution of Reverse AFCON. Refer to the exception trace for details, and contact OpenPages for assistance.
AG-002	Fatal Error	The following error occurred: [error name]	A general error occurred during execution of Reverse AFCON. Refer to the error name for details, and contact OpenPages for assistance.
DU-002	Fatal Error	File found, but could not be read: [file name] See error.log for details.	The input XML file could not be read. Make sure you provide a valid value for the input xml file in the Reverse AFCON interface; it is suggested to Browse to the desired file to prevent typing errors. This error may also occur if the input XML is malformed.
EW-001	Error	Could not create template: [file name] Make sure the file is not currently open. See error.log for details.	An exception occurred while creating the output file for the AFCON template. See error.log for details.
EW-002	Note	Could not file input AFCON template “[template name]”. AFCON template will be created without an Instructions sheet.	Make sure the file exists in the input directory.
EW-003	Note	No entry for Object Type “[object type]” found in contentType.properties.	Add an entry in contentType.properties for the content type and a singular label. If you don’t, the system name of the object type will be used in the AFCON template.
EW-004	Error	Could not create worksheet “[worksheet name]”. See [log file] for details	The worksheet could not be created. See the log file for a stack trace.
EW-005	Error	Could not create worksheets for object type “[object type name]”. See [log file] for details	The worksheet could not be created. See the log file for a stack trace.
MA-001	Fatal Error	Could not create output directory: [directory name] [exception trace]	The output directory does not exist, and a general exception occurred while trying to create it. This can occur if the output directory’s parent directory is read-only.
MA-002	Error	Could not create template: [file name] Make sure the file is not currently open. See error.log for details.	An exception occurred while creating the output file for the AFCON template. See error.log for details.
MA-003	Note	The label [label] for object type [object type name] is listed twice in the contentType.properties. Excel will display an error for any profile that uses both of these object types.	Tabs in Excel need to be uniquely named. The first time you open your generated AFCON template after seeing this Note Excel will display an error message. To fix, make sure all object types have unique

Code	Category	Message	Explanation
MA-004	Fatal Error	File not found: [file name]	label names. The specified properties file could not be found. Make sure the "properties" folder of AFCON contains all the properties files defined in Appendix A.
MA-005	Fatal Error	File found, but could not be loaded: [file name] See error.log for details.	A general exception occurred while loading the properties file. Refer to error.log for an exception trace.
XR-001	Error	The Object Profile "[profile name]" could not be found in the input file.	Check the <objectProfiles> tag and <objectProfileViewsSet> tag in the input schema file; both tags need to be present and the profile must be listed in both. No data will be written in the AFCON template for this profile unless this error is resolved.
XR-002	Note	No entry for Object Type "[object type]" found in contentType.properties.	Add an entry in contentType.properties for the content type and a singular label. If you don't, the system name of the object type will be used in the AFCON template.
XR-003	Error	Could not create worksheet "[worksheet name]". Data may be missing in the input schema file. See [log file] for details	The worksheet could not be created. This might occur if the input XML file is missing part of the definition of the worksheet in question. See the log file for a stack trace. To minimize the chance of seeing this error, make sure the input schema XML file has been generated from a version of OpenPages compatible with this version of Reverse AFCON.
XR-004	Note	Could not create worksheets for object type "[object type name]". Data may be missing in the input schema file. See [log file] for details	The worksheet(s) could not be created that contain information about the object type mentioned. This might occur if the input XML file is missing part of the definition of the object type in question. See the log file for a stack trace. To minimize the chance of seeing this error, make sure the input schema XML file has been generated from a version of OpenPages compatible with this version of Reverse AFCON.
XR-005	Error	Cannot find full definition for Field "[field name]" in Field Group "[field group name]" for Object Type "[object type name]"	Reverse AFCON could not find all of the information needed for this field in the input XML. The field details in the AFCON template for this field will be incomplete/incorrect.
XR-006	Note	Cannot find hidden fields for Object Type "[object type name]"	Reverse AFCON could not find information about all of the fields that exist in the system that are not visible in this profile. Some hidden fields may be missing from the template.
XR-007	Note	Cannot find hidden fields for Field Group "[field group name]" for Object Type "[object type name]"	Reverse AFCON could not find information about all of the fields that exist in the system that are not visible in this profile. Some hidden fields may be missing from the template. If the field groups mentioned are internal currency field groups (which typically have an "_" in the name), this warning can be ignored.
XR-008	Error	Cannot create workbook. Data may be missing in the input schema file.See [log file] for details.	Some data might be missing or RAFCON did not find the required data in the input schema.

Code	Category	Message	Explanation
XR-009	Error	Error while creating the worksheet [sheet name] The JSON Config may be missing or invalid in the input schema file.\r\nSee {1} for details.	The JSON Config for the homepageTab of type TILES is either missing or is not in a valid JSON format.

Appendix C: Notices

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