# Archer Scripts Save Confirmation

The Archer Scripts Save Confirmation Tool & Utility is an offering provided through the Archer Exchange to enhance your existing Archer implementation. The Archer Exchange provides offerings to expand the use of Archer solutions into new business processes and address specific industry, geographic, regulatory, or technical requirements.

Archer Scripts does not provide an installation package on the Archer Exchange. To learn more about the Archer Scripts Save Confirmation Tool & Utility or obtain the installation package, please contact Archer Scripts at [info@ArcherScripts.com](mailto:info@archerscripts.com).

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## About Archer Scripts Save Confirmation Tool & Utility

Archer Scripts LLC is offering the Archer community a suite of custom objects, free of charge. These are designed to streamline common operational functionalities, thereby improving efficiency and the user experience. The Archer Scripts Save Confirmation Tool & Utility was created to provide an extra layer of verification to confirm that a user is ready to proceed with saving a record. End users may unintentionally save records that could lock the record or advance the record to the next stage in the workflow.

This offering allows Archer administrators to easily configure a save confirmation feature, prompting users with a confirmation message to either proceed with or cancel their save action. This is crucial in scenarios where saving a record may lock it or advance it to the next stage, providing users with an extra layer of confirmation.

The Archer Scripts Save Confirmation Tool & Utility is environment and field ID agnostic, ensuring a seamless experience.

### Key features and benefits

The Archer Scripts Save Confirmation Tool & Utility enables organizations to:

* Prompt the end user with a pop-up message allowing the user to confirm the record should be saved or cancel
* Inform users of save scenarios, such as record locking or workflow implications
* Configure messages by Archer Admins to ensure the end user understands the specific implications of the Save action

### Prerequisites

The following table lists the components and prerequisites for the Archer Scripts Save Confirmation Tool & Utility.

| Components | Prerequisites |
| --- | --- |
| Archer Solution Area(s) | N/A |
| Archer Use Case(s) | N/A |
| Archer Applications | N/A |
| Uses Custom Objects | Yes. Script can be applied to any application or questionnaire. |
| Requires Archer On-Demand License | This offering requires zero (0) ODA's but does use one (1) ODA to host the custom object to showcase examples in which is optional. |
| Archer Platform Requirements | Archer Platform Release 2024.03 and later |
| Supported Archer Environments | * On-Premises * SaaS |
| Partner/Vendor Requirements | Valid Archer Scripts license is required, free of charge. |
| Operating System | All |
| Database Server | All |
| Services Server | All |

#### Additional Resources

The following additional resources are available for this offering:

* <https://www.archerscripts.com/>

## Archer Scripts Save Confirmation Tool & Utility components

### Architecture diagram

This solution is powered by a custom object, which can be deployed to any applications or questionnaires.

### Applications

**Note:** The “Archer Scripts LLC UI Enhancement Toolkit” On-Demand Application (ODA) is ONLY used to host these custom objects and provide already configured examples to showcase the functionality. No ODA license is required for this solution.

The following table describes the Archer Scripts Save Confirmation Tool & Utility applications.

| Application | Description |
| --- | --- |
| Archer Scripts UI Enhancement Toolkit | This application is used to host the custom object. It has sample fields built which can be used to test the various features provided by the custom object. |

## Installing Archer Scripts Save Confirmation Tool & Utility

### Security considerations

The information in this publication is provided "as is". Archer makes no representations or warranties of any kind with respect to the information in this publication, and specifically disclaims implied warranties of merchantability or fitness for a particular purpose. Client is solely responsible for ensuring that the installation of the application is performed in a secure manner. Archer recommends clients perform a full security evaluation prior to implementation.

### Installation overview

The solution consists of a custom object, designed for easy integration into your existing applications. The ODA Archer Scripts LLC UI Enhancement Toolkit is not required to be installed if you wish to apply the Custom Object directly to your Archer applications.

To facilitate a clear understanding of its capabilities, we offer the "Archer Scripts LLC UI Enhancement Toolkit" ODA that serves exclusively as a demonstration tool. This ODA showcases the functionalities through pre-configured examples. Please follow the subsequent steps to install the ODA, which hosts the script for demonstration purposes only, no ODA license is required for this solution.

#### Step 1: Prepare for the installation

1. Ensure that your Archer system meets the following requirements:
   * Archer Platform version 2024.03 and later.
2. Read and understand "Packaging Data" in the [Archer Platform Help](https://help.archerirm.cloud/archer_suite_help/Default.htm).

#### Step 2: Install the package

Installing a package requires that you import the package file, map the objects in the package to objects in the target instance, and then install the package.

#### Task 1: Back up your database

This step is optional as the ODA is a new one and is not interacting with any existing use case applications.

There is no Undo function for a package installation. Packaging is a powerful feature that can make significant changes to an instance. Back up the instance database before installing a package. This process enables a full restoration if necessary.

An alternate method for undoing a package installation is to create a package of the affected objects in the target instance before installing the new package. This package provides a snapshot of the instance before the new package is installed, which can be used to help undo the changes made by the package installation. New objects created by the package installation must be manually deleted.

#### Task 2: Import the package

1. From the menu bar, click Admin menu > Application Builder > Install Packages.
2. In the Available Packages section, click Import.
3. Click Add New, then locate and select the package file that you want to import.
4. Click OK.

* The package file is displayed in the Available Packages section and is ready for installation.

#### Task 3: Map objects in the package

**Important:** This step is required only if you are upgrading to a later version of Archer Scripts LLC UI Enhancement Toolkit.

1. From the menu bar, click Admin menu > Application Builder > Install Packages.
2. In the Available Packages section, locate the package you want to map.
3. In the Actions column, click Map package for that package.

* The analyzer examines the information in the package. The analyzer automatically matches the system IDs of the objects in the package with the objects in the target instance and identifies objects from the package that are successfully mapped to objects in the target instance, objects that are new or exist but are not mapped, and objects that do not exist (the object is in the target but not in the source).
* When the analyzer is complete, the Advanced Package Mapping page lists the objects in the package file and corresponding objects in the target instance.

1. On the Advanced Mapping page, click to open each category and review the icons next to each object to determine which objects you must map manually.

The following table describes the icons.

| Icon | Name | Description |
| --- | --- | --- |
| Awaiting mapping review | Awaiting Mapping Review | Indicates that the system could not automatically match the object or one of its children to a corresponding object in the target instance.  Objects marked with this icon must be mapped manually.  New objects should not be mapped. Select Do Not Map from the drop-down menu to clear this icon for an individual object, or click Do Not Map to clear the icon for all unmapped objects. |
| Mapping completed | Mapping Completed | Indicates that the object and all children are mapped to objects in the target instance, or that they have been marked as Do Not Map. Nothing more needs to be done with these objects in Advanced Package Mapping. |

* **Note:** You can run the mapping process without mapping all objects. The Awaiting mapping review icon is for informational purposes only.

1. For objects awaiting mapping review, do one of the following:
   * To map each object individually, use the drop-down menu in the Target column to select the object in the target instance to which you want to map the source object. To leave an object unmapped, select Do Not Map in the Target column.
   * To automatically map all objects in a category that have different system IDs but the same object name as an object in the target instance, click Auto Map. Select whether to ignore case and spaces when matching object names. Click OK.
   * To mark all unmapped objects as Do Not Map, click Do Not Map.
2. (Optional) Click Filter to enable filter fields that you can use to find specific objects in each mapping category. To undo your mapping selections, click Undo, then select whether to undo all mappings in the category or only the mappings on a single page. If you choose to undo all mappings, you will be returned to the categories list.
3. (Optional) To save your mapping selections and return to the categories list without committing changes to the target instance, click RSA.
4. After you review and map all objects, click Execute.
5. Select I understand the implications of performing this operation. Click OK.

* When the mapping is complete, the Import and Install Packages page displays.
* **Important:** Advanced Package Mapping modifies the system IDs in the target instance. You must update any Data Feeds and Web Service APIs that use these objects with the new system IDs.

#### Task 4: Install the package

1. From the menu bar, click Admin menu > Application Builder > Install Packages.
2. In the Available Packages section, locate the package file that you want to install, and click the file name or Import at end of the row to open the Options menu.
3. In the Selected Components section, click the Lookup button to open the Package Selector window.
   * To select all components, select the top-level checkbox.
   * To install only specific global reports in an already installed application, select the checkbox associated with each report that you want to install.

* **Note:** Items in the package that do not match an existing item in the target instance are selected by default.

1. Under the Translation Option drop-down menu, select an option for each selected component. To use the same Translation Option for all selected components, select a method from the top-level drop-down list.  
   **Note:** The Translation Option is enabled only when a language is selected.

The following table describes the options.

| Option | Description |
| --- | --- |
| Full Install | Installs the component and its translations from the selected languages. |
| Translations Only | Only installs the translations from the selected languages. |

1. Under the Install Method drop-down menu, select an option for each selected component. To use the same Install Method for all selected components, select a method from the top-level drop-down list.

The following table describes the options.

| Option | Description |
| --- | --- |
| Create New Only | Only creates new fields and other elements in the applications, questionnaires, workspaces, data feeds, and dashboards specified in the package file. This option does not modify any existing elements on your instance of Archer. This is useful when you want to add functionality to an existing application, questionnaire, workspace, dashboard, data feed, or access role, but you do not want to risk making any unwanted changes to the existing elements of workspaces, data feeds, or dashboards. iViews that are not currently on the dashboards that are selected for the package install are created.  **Note:** The Create New Only option does not apply to access roles or languages. |
| Create New and Update | Updates all elements in the applications, questionnaires, workspaces, data feeds, and dashboards as specified in the package file. This includes adding new elements and updating existing elements. Existing iViews on the dashboards that are selected for the package install are updated, and iViews that are not currently on the dashboards that are selected for the package install are created.  **Note:** The Create New and Update option does not apply to access roles or languages. |

1. Under the Install Option drop-down menu, select an option for each selected component. To use the same Install Option for all selected components, select an option from the top-level drop-down list.

The following table describes the options.

| Option | Description |
| --- | --- |
| Do not Override Layout | Installs the component, but does not change the existing layout. This is useful if you have a lot of custom fields and formatting in your layout that you do not want to risk losing.  You may have to modify the layout after installing the package to use the changes made by the package.  **Note:** The Do not Override Layout option does not apply to access roles or languages. |
| Override Layout | Updates the layout as specified in the package file, overwriting the existing layout.  **Note:** The Override Layout option does not apply to access roles or languages. |

1. Click Continue to advance to the next object category in the Package Selector, and repeat steps 4 to 6. After reviewing all object categories, click OK.
2. To deactivate target fields and data-driven events that are not in the package, in the Post-Install Actions section, select the Deactivate target fields and data-driven events that are not in the package checkbox. To rename the deactivated target fields and data-driven events with a user-defined prefix, select Apply a prefix to all deactivated objects, and enter a prefix. This can help you identify any fields or data-driven events that you may want to review for cleanup post-install.
3. Click Install.
4. Click OK.

#### Task 5: Review the package installation log

1. From the menu bar, click Admin menu > Application Builder > Install Packages.
2. In the Package Installation Log section, click the package that you want to view.
3. In the Package Installation Log page, in the Object Details section, click View All Errors.

* **Note:** To view individual logs, in the Errors column of the log you want to view, click the Failures link or Warnings link. Clicking View All Errors, Failures, or Warnings opens the specific errors on a different page.

1. Click the Export icon to export the log file.
2. Click Close.

For a list of packaging installation log messages and remediation information for common messages, see Package Installation Log Messages.

#### Step 3: Test the installation

Test the application according to your company standards and procedures, to ensure that the use case works with your existing processes.

## Configuring Archer Scripts Save Confirmation Tool & Utility

Step 1: Locate the custom object confirm-before-save under DESIGNER section.

Step 2: Expand the custom object and review the Code section. The “config" section is where all the configurations reside. See the definition below.

const config ={

isDev : false,

warningText : 'You are about to save the record, once saved you will no longer have edit access, are you sure?',

};

Update the warningText as needed based on your use case.

## Using Archer Scripts Save Confirmation Tool & Utility

Task 1: Test script in the Archer Scripts UI Enhancement Toolkit ODA from the package

User:

1. Locate the Archer Scripts UI Enhancement Toolkit ODA.
2. Create a new record, click SAVE and see the confirmation message.

Task 2: Using the script in your own applications.

Admin:

1. Go to Application Builder and Archer Scripts UI Enhancement Toolkit ODA, locate the custom object and copy the code into your application where you want to deploy the save confirmation feature.
2. Update the confirmation message as needed.

## Certification environment

Date Tested: July 2024

| Product Name | Release Information | Operating System |
| --- | --- | --- |
| Archer | 2024.03 | Windows |