# Installing the Policy Program Management Packages

Complete the tasks to install the Policy Program Management packages.

On this page

* [Package Installation Sequence](#PackageInstallationSequence)
* [Task 1: Back Up Your Database](#Task1BackUpYourDatabase)
* [Task 2: Import the Package](#Task2ImportthePackage)
* [Task 3: Map Objects in the Package](#Task3MapObjectsinthePackage)
* [Task 4: Install the Package](#Task4InstallthePackage)
* [Task 5: Review the Package Installation Log](#Task5ReviewthePackageInstallationLog)
* [Post-Installation Checklist](#PostInstallationChecklist)
* [Next steps](#Nextsteps)

## Package Installation Sequence

You must complete the tasks for each package in the following order:

1. Install the Enterprise Catalog package.
2. Install the Policy Program Management use case package.
3. Re-install the Enterprise Catalog package to resolve dependencies.

**Note:** If you are using the Issues Management use case, install the Issues Management use case package before you install the Policy Program Management use case package. Some reports used in the Policy Program Management dashboards are from the Issues Management use case.

## Task 1: Back Up Your Database

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

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).
* **Note:** This process can take several minutes or more, especially if the package is large, and may time out after 60 minutes. This time-out setting temporarily overrides any IIS time-out settings set to less than 60 minutes.
* 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 Map Review Icon 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.

**Important:** Re-install the Enterprise Catalog package to resolve dependencies between applications. Failure to re-install the package may generate errors for end users.

## Post-Installation Checklist

After completing the installation process for each package, use the following checklist to verify that you have completed all of the required package installation tasks in order:

1. Install the Enterprise Catalog package.
2. Install the Policy Program Management use case package.
3. Re-install the Enterprise Catalog package to resolve dependencies.

## Next steps

After verifying that you have completed all required installation tasks, go to [Performing Use Case Cleanup Post-Installation](../usecase_postinstall_cleanup.htm).