

IBM OpenPages with Watson  
Version 8.2.0.1

## *Thomson Reuters Upgrade ReadMe*



**NOTE**

Before using this information and the product it supports, read the information in the "Notices" section of this document.

**Product Information**

This document applies to IBM OpenPages with Watson 8.2.0.1 and may also apply to subsequent releases.

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## RCM 8.2.0.1 Thomson Reuters Upgrade Cookbook

### Introduction

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In the 8.1 release, the RCM solution was enhanced to add new features for Regulatory Changes and Horizon Scanning based on the partnership between IBM® and Thomson-Reuters\*. This feature was further enhanced in 8.1.0.1, 8.2, and 8.2.0.1.

As is the case for past releases, solutions (whether out of the box or customized) are not upgraded automatically when performing an upgrade install. An upgrade requires a Services engagement to analyze a customer's existing solutions and determine the best approach on how to use the product solution assets to deliver the solution to the customer.

The RCM Thomson Reuters feature in 8.2.0.1 consists of:

- **Thomson-Reuters Regulatory Events Import (TRRI)** enables clients to import Regulatory Events as a new object type in IBM OpenPages
- **Thomson-Reuters Regulatory Library Import** enables clients to import the TRRI Regulatory Library into OpenPages. The import creates Sub-Mandates for the incoming regulatory library objects.
- **Regulatory Change and Horizon Scanning workflows** include rules and out of the box workflows that provide a simple set of workflows for Regulatory Events from the TRRI feed which drive RegChange and RegTask workflows.
- **Regulatory Library** includes standardized associations and system views for RCM content: Mandates, Submandates, Requirements, Policy, Procedures, and Controls.

\*Thomson-Reuters provides a subscription service, which is sold separately from OpenPages. Customers must have this subscription and its prerequisites in-place (SFTP destination for TRRI XML feeds).

### What's new per release

#### 8.2.0.1

- Running Thomson-Reuters feeds on IBM OpenPages for IBM Cloud Pak for Data
- Updated Sub-Mandate View for Thomson-Reuters feeds
- Updated Solution Object Model for Thomson-Reuters feeds

#### 8.2

- **Thomson-Reuters Document Summary** This feature enables clients to view the document contents without leaving OpenPages.
- **Thomson-Reuters Regulatory Events rules and workflows** The out-of-the-box rules and workflows have been updated. These updates provide a simple set of workflows for incoming Regulatory Events from the TRRI feed.

#### 8.1.0.1

- **Thomson-Reuters Regulatory Library Import** This feature enables clients to import the TRRI Regulatory Library into OpenPages. The import creates Sub-Mandates for the incoming regulatory library objects.

## 8.1

- **Thompson-Reuters Regulatory Events Import (TRRI)** With this new feature, customers can import Regulatory Events as a new object type in OpenPages
- **Regulatory Change and Horizon Scanning workflows** New rules and out of the box workflows provide a simple set of workflows for Regulatory Events from the TRRI feed which drive RegChange and RegTask workflows.
- **Regulatory Library** New standardized associations and system views are provided for RCM content: Mandates, Submandates, Requirements, Policy, Procedures, and Controls.

## Prerequisites

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Only clients who have upgraded to OpenPages 8.2 can use these loader files. Clients must have a Thomson Reuters Regulatory Intelligence license.

## Determining an upgrade strategy

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This cookbook assumes that you are familiar with developing and deploying OpenPages solutions and that you know how to use the related technologies, such as ObjectManager, XML, and server access.

This cookbook combines several loader steps and manual procedures. It's up to the Services team to determine which steps need to be done in a client engagement. **For a customer engagement, it is likely that you'll refactor the loader XML files into your own deliverable package** to simplify the manual steps and to work around any differences due to a client's customizations.

**Please note that the automated scripts and manual instructions set the ObjectManager setting, `configuration.manager.vendor.mode = true`, which will override any changes you may have made to existing profiles, views, etc. in the package. If you do not want this, please refactor the loader XML files to suit your needs.**

In general, clients can choose to load only some of the following RCM capabilities or all of them. In some cases, a client's existing solutions might not work with the new RCM solution's dependencies. You'll need to perform remediation on a case-by-case basis.

Which version to load depends on the client's current solution version.

## TRRI feature overview

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Introduced in release 8.1, this group of features involves the capability to retrieve Thompson-Reuters data from a "feed" of XML files on an SFTP server hosted by each customer. The capability is hard-coded to create TRRIRegEvent and TRRIRegSeries object types, which have non-configurable fields that must be present at minimum (customer can choose to add additional fields for their own taxonomies for example). In order for this feature to work end-to-end, you must set up OpenPages with:

- Schema
  - New TRRIRegEvent object types
  - Field groups
  - CSV fileType and fileType association to SysXMLDocument
- Relationships
- Registry entries
- Profiles that include the new types and fields
- System views for the new types

- Role templates that include permissions for the new types
- A default business entity structure

**Notice** Unlike many past solutions, due to the technical and legal specifics for the TRRI data feed import, many of the schema elements that are required for this feature to work **are not configurable**. The fields, object types, and certain other settings are mandatory and cannot be configured to other values.

## RCM workflows and rules

---

Rules are a capability introduced in 8.1. Rules are used by the TRRI Import feature to perform some operations automatically when criteria are met (for instance starting a workflow or sending a simple notification). This can be configured through a new UI admin page. There are out of the box rules for TRRIRegEvents that start the Regulatory Change or Horizon Scanning workflows.

*This is not needed for the TRRI Import feature to work, but the end-to-end RCM solution expects that the TRRI data is used to feed to Regulatory Change or Horizon Scanning workflows defined by the customer.*

## Regulatory Library

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The Regulatory Library is a term referring to six object-types that the customer will use to maintain the Regulatory information. This includes new field groups, fields, and relationships. In 8.1 solutions, updated system views specific to the OpenPages RCM Master profile were provided for these object types, in addition to the default system views. The object types that are part of the Regulatory Library are:

- Mandate
- SubMandate
- Requirement

In 8.1.0.1, the Mandate, SubMandate, and Requirement object types were updated. The updates included new field groups, fields, and relationships. Version 8.1.0.1 also added RCM-specific system views for the three updated object types.

*This is not needed for the TRRI Import feature to work.*

## Thomson Reuters Regulatory Library updates

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With this feature, clients can retrieve regulatory library data from a Thomson Reuters *feed* by using the SFTP configuration that is provided to each client when they purchase a subscription. For this feature to work end-to-end, you must set up OpenPages with:

- New field groups and fields
- New registry entries
- Profiles that include the new object types and fields
- New and updated system views
- Updated rules and workflows

**Notice** Unlike solutions updates that you've done in the past, due to the technical and legal specifics for the TRRI regulatory library data feed import, many of the schema elements that are required for this feature **are not configurable**. The fields, object types, and certain other settings are mandatory and cannot be configured to other values.

*These updates are not required for the TRRI regulatory event import. But they are required for the TRRI regulatory library import.*

## Loading TRRI in 8.2.0.1

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The 8.2.0.1 loader files are not on the installation media. The OpenPages Support team can give clients access to a package that contains the 8.2.0.1 loader files.

All the changes for the various releases of Thomson Reuters integration are documented in later sections in this cookbook. To simplify the update and to save time, we've provided a script that loads all the files. You can choose to load the changes automatically or you can manually select the changes as appropriate for your client's environment.

Additionally, you can load the files remotely using the ObjectManager client or, for non-Cloud Pak for Data environments, load the files from the application server.

## Loading files remotely

As of 8.2.0.1, you can now import the loader files remotely by using the ObjectManager client tool, which you download separately. For instructions on how to install the ObjectManager client tool, see the *Administrator's Guide*: [https://www.ibm.com/support/knowledgecenter/SSFUEU\\_8.2.0/op\\_grc\\_admin/t\\_remote\\_utils.html](https://www.ibm.com/support/knowledgecenter/SSFUEU_8.2.0/op_grc_admin/t_remote_utils.html).

To load the feeds remotely, you must:

1. Download the package and expand it to your local machine, later referred to as the `FEED_FOLDER_LOCATION`
2. Set up the environment variable, `OPC_BIN_DIR`, to point to the tools' bin folder.
3. Set up the URL of the remote server in `openpages-tools-client.properties`:  
`rest.url.path=https://<host:port>/grc/api`.

**Note:** To set up the feed on IBM OpenPages for IBM Cloud Pak for Data, you must use the ObjectManager client.

## Loading files from the application server

To set up the feed from the application server, you must download the package and expand the package contents to your application server at the location: `PATH_IN_OP_SERVER/Upgrade-Accelerators/RCM`, later referred to as the `FEED_FOLDER_LOCATION`.

## 8.2.0.1 Package

The provided package in 8.2.01 contains all the changes for Thomson Reuters support since its initial release in 8.1. Each folder contains the release-specific changes, which can be loaded into 8.2 as follows:

<code>RCM_TRRI_Base_Loader_Files</code>	Folder containing the 8.1 changes
<code>RCM_TRRI_8101_Loader_Files</code>	Folder containing the 8.1.0.1 changes only
<code>RCM_TRRI_8200_Loader_Files</code>	Folder containing the 8.2 changes only
<code>RCM_TRRI_8201_Loader_Files</code>	Folder containing the 8.2.0.1 changes only

Which changes to apply depends on the current TRRI version that is loaded.

Pre 8.1 → 8.2.0.1      Load the changes in all the folders as per instructions below



8.1 → 8.2.0.1	Load the changes in the RCM_TRRI_8101_Loader_Files, RCM_TRRI_8200_Loader_Files, and RCM_TRRI_8201_Loader_Files folders as per instructions below
8.1.0.1 → 8.2.0.1	Load the changes in the RCM_TRRI_8200_Loader_Files folder and RCM_TRRI_8201_Loader_Files folders as per instructions below
8.2 → 8.2.0.1	Load the changes in the RCM_TRRI_8201_Loader_Files folder as per instructions below

**Note:** Use only this 8.2.0.1 package for loading the changes across releases. Do not attempt to use previously published packages to load/upgrade to 8.2.0.1.

## Loading Thomson Reuters changes automatically

### Upgrading from a pre-8.1 install or new 8.2 install

Go to the location where you copied the Thomson Reuters package.

Please note that there might be an error due to a model issue in 7.4 as described in the section “(Optional) Load the extended relationships for the TRRI object types.” Please resolve as described before starting the process.

Follow these steps:

1. Go to your FEED\_FOLDER\_LOCATION
2. Do one of the following steps:
  - If running from a Linux system:
    - Run: `chmod +x Run_RCM_TRRI_Full.sh`
    - `./Run_RCM_TRRI_Full.sh OpenPagesAdministrator PASSWORD`
  - If running on a Microsoft Windows system:
    - Run: `Run_RCM_TRRI_Full.bat OpenPagesAdministrator PASSWORD`

### Upgrading from an 8.1 install

3. Go to your FEED\_FOLDER\_LOCATION
4. Go to the RCM\_TRRI\_8101\_Loader\_Files directory and do one of the following steps:
  - If running from a Linux system:
    - Run: `chmod +x RCM_TRRI_8101_loader.sh`
    - `./RCM_TRRI_8101_loader.sh OpenPagesAdministrator PASSWORD`
  - If running on a Microsoft Windows system:
    - Run: `RCM_TRRI_8101_loader.bat OpenPagesAdministrator PASSWORD`

Then follow the steps in the section “Upgrading from an 8.1.0.1 install” below.

### Upgrading from an 8.1.0.1 install

5. Go to your FEED\_FOLDER\_LOCATION
6. Go to the RCM\_TRRI\_8200\_Loader\_Files directory and do one of the following steps:
  - If running from a Linux system:
    - Run: `chmod +x RCM_TRRI_8200_loader.sh`
    - `./RCM_TRRI_8200_loader.sh OpenPagesAdministrator PASSWORD`
  - If running on a Microsoft Windows system:
    - Run: `RCM_TRRI_8200_loader.bat OpenPagesAdministrator PASSWORD`

## Loading Thomson Reuters changes manually

In this section, we go over all the commands that are run and explain the changes. You can run the commands in this section instead of using the shell or batch scripts.

### Upgrading from a pre-8.1 install or a new 8.2 install

To load the changes manually from a pre-8.1 install or for a new 8.2 install, please follow the steps from the following sections:

- Manually loading changes for 8.1
- Manually loading changes for 8.1.0.1
- Manually loading changes for 8.2
- Manually loading changes for 8.2.0.1

### Upgrading from an 8.1 install

To load the changes manually to a TRRI upgrade from 8.1, please follow the steps from the following sections:

- Manually loading changes for 8.1.0.1
- Manually loading changes for 8.2
- Manually loading changes for 8.2.0.1

### Upgrading from an 8.1.0.1 install

To load the changes manually to a TRRI upgrade from 8.1.0.1, please follow the steps from the following sections:

- Manually loading changes for 8.2
- Manually loading changes for 8.2.0.1

### Manually loading changes for 8.1

This section contains the manual steps for loading all the TRRI changes that were introduced in release 8.1.

#### ***Loading the TRRIRegEvent object type schema and its labels***

1. Set the ObjectManager.properties flags  
`configuration.manager.vendor.mode = true`  
`configuration.manager.force.update.object.strings=true`  
`configuration.manager.force.update.application.strings=true`

```
./ObjectManager.sh 1 c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_TRRI_Base_Loader_Files/Schema/
OPS_Modules_Master_schema

./ObjectManager.sh 1 c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_TRRI_Base_Loader_Files/Text/
OPS_Modules_Master_object-strings-en_US
```

2. Set the `configuration.manager.vendor.mode`,  
`configuration.manager.force.update.object.strings`,  
`configuration.manager.force.update.application.strings` flags back to false

**Load the base required relationships for TRRI import**

1. Set the ObjectManager.properties flags  
configuration.manager.vendor.mode = true  
configuration.manager.force.update.object.strings=true  
configuration.manager.force.update.application.strings=true

```
./ObjectManager.sh 1 c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_TRRI_Base_Loader_Files/Schema/
RCM_first-class-schema

./ObjectManager.sh 1 c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_TRRI_Base_Loader_Files/Schema/
OpenPagesModules-object-relationships
```

2. Set the configuration.manager.vendor.mode,  
configuration.manager.force.update.object.strings,  
configuration.manager.force.update.application.strings flags back to false

**(Optional) Load the extended relationships for the TRRI object types**

This is not required by the TRRI Import feature, but it is required for the Regulatory Library and RCM workflows.

**Note:** This step might require manual rework because pre-8.1 out-of-the-box solutions had an object model that is incompatible with this loader, due to the RegChange/RegTask objects being an ancestor/parent of other objects: Policy, Procedure, Control. This would result in a loop. You will need to disable those relationships, if they exist, before loading this file.

Example: For a customer on 7.4 OOB solutions, you need to manually disable the RegTask -> Policy association, and the Policy -> Requirement and Procedure -> Requirement, also Control -> Mandate / SubMandate / Requirement. If not fixed, you will see an error similar to:

```
Loader EXCEPTION (Line: 37 Column: 38): An unexpected exception occurred.
Please see ObjectManager.log for details.
Error Message: OP-06028: Hierarchy structure rule of relation type "1" between
object types "141" and "105" for the hierarchy type "1" creates a loop.
Indicator if rule is supported is "1". [T94KCZ000HRN]
Load command
```

```
./ObjectManager.sh 1 c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_TRRI_Base_Loader_Files/Schema/ RCM_TRRI-extended-
relationships
```

**Warning** If you see the above error, then you will be unable to load the new relationships even after you disable the relationships. This is a known issue/defect that is being investigated. To work around the issue, you might need to drop "orphaned" tables from the reporting schema manually in order to reset the database to a clean state.

**Load the TRRI business entity hierarchy**

Create the default business entity hierarchy for TRRI data. The TRRI data expects a business entity path to exist to create objects underneath: /BusinessEntity/Library/RCM/RegEvents/TRRIRegEvents.

```
./ObjectManager.sh 1 c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_TRRI_Base_Loader_Files/Schema/ OpenPagesModules-
sample-data
```

**Load the role templates**

1. Set the ObjectManager.properties flags  
configuration.manager.vendor.mode = true  
configuration.manager.force.update.object.strings=true  
configuration.manager.force.update.application.strings=true

```
.\ObjectManager 1 c OpenPagesAdministrator password
FEED_FOLDER_LOCATION\RCM_TRRI_8200_Loader_Files\RCM_TRRI_Base_Loader_Files\
Schema\ OPS_RCM_roleTemplates
```

2. Set the configuration.manager.vendor.mode,  
configuration.manager.force.update.object.strings,  
configuration.manager.force.update.application.strings flags back to false

**Load the default TRRI taxonomy mapping**

1. Set the ObjectManager.properties flags  
configuration.manager.vendor.mode = true  
configuration.manager.force.update.object.strings=true  
configuration.manager.force.update.application.strings=true

```
./ObjectManager.sh 1 c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_TRRI_Base_Loader_Files/Schema/
trri_taxonomy_map
```

2. Set the configuration.manager.vendor.mode,  
configuration.manager.force.update.object.strings,  
configuration.manager.force.update.application.strings flags back to false

**Load the registry entries for new TRRI object types**

```
./ObjectManager.sh 1 c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_TRRI_Base_Loader_Files/Registry/ CascadeDelete
```

```
./ObjectManager.sh 1 c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_TRRI_Base_Loader_Files/Registry/ ObjectPrefix
```

```
./ObjectManager.sh 1 c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_TRRI_Base_Loader_Files/Registry/ ObjectTypes
```

```
./ObjectManager.sh 1 c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_TRRI_Base_Loader_Files/Registry/ OpenPages-
actionmenu-registry-entries
```

```
./ObjectManager.sh 1 c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_TRRI_Base_Loader_Files/Registry/ OpenPages-core
```

```
./ObjectManager.sh 1 c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_TRRI_Base_Loader_Files/Registry/ OpenPages-core-
registry-entries
```

```
./ObjectManager.sh 1 c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_TRRI_Base_Loader_Files/Registry/ OpenPagesModules-
first-class-registry-entries
```

```
./ObjectManager.sh 1 c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_TRRI_Base_Loader_Files/Registry/ OpenPagesModules-
first-class-schema
```

```
./ObjectManager.sh 1 c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_TRRI_Base_Loader_Files/Registry/ RCM_first-class-
registry-entries
```

```
./ObjectManager.sh 1 c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_TRRI_Base_Loader_Files/Registry/ set-Lock-button
```

### ***Load the application text***

1. Set the ObjectManager.properties flags  
configuration.manager.vendor.mode = true  
configuration.manager.force.update.object.strings=true  
configuration.manager.force.update.application.strings=true
2. Load the files with ObjectManager

```
.\ObjectManager 1 c OpenPagesAdministrator password
FEED_FOLDER_LOCATION\RCM_TRRI_8200_Loader_Files\RCM_TRRI_Base_Loader_Fil
es\Text\ common-app-string-keys
```

```
.\ObjectManager 1 c OpenPagesAdministrator password
FEED_FOLDER_LOCATION\RCM_TRRI_8200_Loader_Files\RCM_TRRI_Base_Loader_Fil
es\Text\ OpenPagesModules-first-class-object-strings-en_US
```

```
.\ObjectManager 1 c OpenPagesAdministrator password
FEED_FOLDER_LOCATION\RCM_TRRI_8200_Loader_Files\RCM_TRRI_Base_Loader_Fil
es\Text\ OPS_Modules_Master_object-strings
```

```
.\ObjectManager 1 c OpenPagesAdministrator password
FEED_FOLDER_LOCATION\RCM_TRRI_8200_Loader_Files\RCM_TRRI_Base_Loader_Fil
es\Text\ RCM_first-class-object-strings-en_US
```

3. Set the configuration.manager.vendor.mode,  
configuration.manager.force.update.object.strings,  
configuration.manager.force.update.application.strings flags back to false

### ***Load Task UI system views for TRRIRegEvent and TRRIRegSeries & labels***

1. Set the ObjectManager.properties flags  
configuration.manager.vendor.mode = true  
configuration.manager.force.update.object.strings=true  
configuration.manager.force.update.application.strings=true
2. Load the files with ObjectManager

```
./ObjectManager.sh 1 c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_TRRI_Base_Loader_Files/View/ sv-TRRIRegEvent
```

```
./ObjectManager.sh 1 c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_TRRI_Base_Loader_Files/View/string-keys/ sv-
app-string-keys-TRRIRegEvent

./ObjectManager.sh 1 c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_TRRI_Base_Loader_Files/View/ sv-TRRIRegSeries

./ObjectManager.sh 1 c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_TRRI_Base_Loader_Files/View/string-keys/ sv-
app-string-keys-TRRIRegSeries
```

3. Set the configuration.manager.vendor.mode,  
configuration.manager.force.update.object.strings,  
configuration.manager.force.update.application.strings flags back to false

### ***Load Task UI system views for Regulatory Library and labels***

1. Set the ObjectManager.properties flags  
configuration.manager.vendor.mode = true  
configuration.manager.force.update.application.strings=true
2. Load the files with ObjectManager:

```
./ObjectManager.sh 1 c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_TRRI_Base_Loader_Files/View/ sv-Mandate

./ObjectManager.sh 1 c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_TRRI_Base_Loader_Files/View/string-keys/ sv-
app-string-keys-Mandate

./ObjectManager.sh 1 c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_TRRI_Base_Loader_Files/View/ sv-Submandate

./ObjectManager.sh 1 c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_TRRI_Base_Loader_Files/View/ /string-keys/ sv-
app-string-keys-Submandate

./ObjectManager.sh 1 c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_TRRI_Base_Loader_Files/View/ sv-RegChange

./ObjectManager.sh 1 c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_TRRI_Base_Loader_Files/View/string-keys/ sv-
app-string-keys-RegChange

./ObjectManager.sh 1 c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_TRRI_Base_Loader_Files/View/ sv-Policy

./ObjectManager.sh 1 c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_TRRI_Base_Loader_Files/View/string-keys/ sv-
app-string-keys-Policy

./ObjectManager.sh 1 c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_TRRI_Base_Loader_Files/View/ sv-Procedure
```

```
./ObjectManager.sh 1 c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_TRRI_Base_Loader_Files/View/string-keys/ sv-
app-string-keys-Procedure

./ObjectManager.sh 1 c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_TRRI_Base_Loader_Files/View/ sv-SOXControl

./ObjectManager.sh 1 c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_TRRI_Base_Loader_Files/View/string-keys/ sv-
app-string-keys-SOXControl

./ObjectManager.sh 1 c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_TRRI_Base_Loader_Files/View/ sv-Requirement

./ObjectManager.sh 1 c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_TRRI_Base_Loader_Files/View/string-keys/ sv-
app-string-keys-Requirement
```

3. Set the `configuration.manager.vendor.mode`,  
`configuration.manager.force.update.application.strings` flags back to false

### ***Loading the localized object text labels for the TRRI object types***

The localized strings for the object types are located in the locale-specific directories under the `FEED_FOLDER_LOCATION/RCM_TRRI_Base_Loader_Files/Text` directory.

### ***Loading the localized text labels for the views***

The localized strings for the object types are located in the locale-specific directories under the `FEED_FOLDER_LOCATION/RCM_TRRI_Base_Loader_Files/View` directory.

### ***Load the OOB rules & workflows***

Load the schema changes for RegChange and RegTask used by the workflows

```
./ObjectManager.sh 1 c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_TRRI_Base_Loader_Files/Schema/
RCM_rules-workflows-schema
```

Load the rules and workflows for processing regulatory events

```
./ObjectManager.sh 1 c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_TRRI_Base_Loader_Files/Schema/ RCM_81-rules-workflows
```

### ***Manually loading changes for 8.1.0.1***

This section contains the manual steps for loading all the TRRI changes that were introduced in release 8.1.0.1.

### ***Loading the TRRI shared schema and its labels***

1. Set the `ObjectManager.properties` flags  
`configuration.manager.vendor.mode = true`  
`configuration.manager.force.update.object.strings=true`  
`configuration.manager.force.update.application.strings=true`

2. Load the files with ObjectManager

```
./ObjectManager.sh 1 c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_TRRI_8101_Loader_Files/Schema/
RCM_trri_shared_schema

./ObjectManager.sh 1 c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_TRRI_8101_Loader_Files/Text/
RCM_trri_shared_strings_en_US
```

3. Set the `configuration.manager.vendor.mode`,  
`configuration.manager.force.update.object.strings`,  
`configuration.manager.force.update.application.strings` flags back to false

The schema in these files is referenced from the code when loading the TRRI Regulatory Library and *cannot* be modified/renamed. Clients can only rename the labels or add additional fields to these objects. The schema contains the following field groups:

- RCM-TRRI-Shared Contains shared fields that are used for TRRI Regulatory Library objects. This field group is assigned to the Mandate, SubMandate, and Requirement object types.
- RCM-TRRI-Taxonomy This is an existing field group from 8.1. This update adds it to the Mandate, SubMandate, and Requirement object types.

### **Loading registry settings**

```
./ObjectManager.sh 1 c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_TRRI_8101_Loader_Files/Registry/
TRRI_registry_entries
```

This file creates all of the registry entries that are required to configure a TRRI Regulatory Library import.

### **Loading new business entities**

This entity is required to import regulatory library (SubMandate) contents from TRRI. The TRRI data ingestion expects two business entity paths:  
BusinessEntity/Library/RCM/RegEvents/TRRIRegEvents (already exists) for regulatory events  
and BusinessEntity/Library/RCM/RegLibrary/TRRIRegLibrary (new) for the regulatory library.

Load the new business entity path with ObjectManager:

```
./ObjectManager.sh 1 c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_TRRI_8101_Loader_Files/Schema/
TRRI_reg_library_entity
```

### **Loading new RegChange system view for the TRRIRegEvent object**

This file includes the new RegChange system view. The system view is used for the TRRIRegEvent object and is used in the out-of-the-box workflows.

1. Set the `ObjectManager.properties` flags  
`configuration.manager.vendor.mode = true`  
`configuration.manager.force.update.application.strings=true`
2. Load the files with ObjectManager:  

```
./ObjectManager.sh 1 c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_TRRI_8101_Loader_Files/View/ sv-RegChange
```



```
./ObjectManager.sh l c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_TRRI_8101_Loader_Files/View/ sv-app-string-
keys-RegChange
```

3. Set the `configuration.manager.vendor.mode`,  
`configuration.manager.force.update.application.strings` flags back to false

### ***Loading the new SubMandate system view for regulatory library objects***

This file includes the new SubMandate system view, which is used for the TRRI Regulatory Library.

1. Set the `ObjectManager.properties` flags  
`configuration.manager.vendor.mode = true`  
`configuration.manager.force.update.application.strings=true`
2. Load the files with ObjectManager:

```
./ObjectManager.sh l c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_TRRI_8101_Loader_Files/View/ sv-Submandate

./ObjectManager.sh l c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_TRRI_8101_Loader_Files/View/ sv-app-string-
keys-Submandate
```

3. Set the `configuration.manager.vendor.mode`,  
`configuration.manager.force.update.application.strings` flags back to false

### ***Loading the updates to workflows and rules***

The out-of-the-box workflow **Regulatory Change Review Workflow**, which was installed in 8.1, is now replaced by the **TRRI Regulatory Change Review Workflow**. This new workflow is a rename of the original one, to distinguish it from the workflows for other regulatory event providers. Also, the new workflow specifies a new task view to use when determining applicability for a regulatory change. If you choose to load this update, you must disable the old workflow, **Regulatory Change Review Workflow**, first. Otherwise, the two workflows will attempt to start on the same regulatory change object and fail.

1. Disable the old workflow, **Regulatory Change Review Workflow**.
2. Load the updated workflow with ObjectManager:

```
./ObjectManager.sh l c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_TRRI_8101_Loader_Files/Schema/
RCM_81_rules_workflows
```

There are no other updates to rules and workflows in 8.1.0.1.

### ***New content source field value***

This update adds a new value Thomson Reuters to the field. This update assumes that the schema has the `OPSS-Mand:Content Source` and `OPSS-SubMand:Content Source` property types. There's also a dependency defined between the new value and the existing values. Refer to the `RCM_trri_content_source-op-config.xml` file for all the details. Load the new enum value for the Content Source field.

1. Set the `ObjectManager.properties` flags  
`configuration.manager.vendor.mode = true`

```
configuration.manager.force.update.object.strings=true
configuration.manager.force.update.application.strings=true
```

```
./ObjectManager.sh 1 c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_TRRI_8101_Loader_Files/Schema/
RCM_trri_content_source

./ObjectManager.sh 1 c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_TRRI_8101_Loader_Files/Text/
RCM_trri_content_source_strings_en_US
```

2. Set the configuration.manager.vendor.mode,  
configuration.manager.force.update.object.strings,  
configuration.manager.force.update.application.strings flags back to false

### **Loading other strings**

These strings are used by the TRRI import. These strings include email templates, dashboard, and UI text strings.

1. Set the ObjectManager.properties flags  
configuration.manager.vendor.mode = true  
configuration.manager.force.update.application.strings=true

```
./ObjectManager.sh 1 c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_TRRI_8101_Loader_Files/Text/ Other_strings

.\ObjectManager 1 c OpenPagesAdministrator password
FEED_FOLDER_LOCATION\RCM_TRRI_8200_Loader_Files\RCM_TRRI_8101_Loader_Fil
es\View RCM_trri_dashboard_views

.\ObjectManager 1 c OpenPagesAdministrator password
FEED_FOLDER_LOCATION\RCM_TRRI_8200_Loader_Files\RCM_TRRI_8101_Loader_Fil
es\View RCM_trri_dashboard_view_string_keys

.\ObjectManager 1 c OpenPagesAdministrator password
FEED_FOLDER_LOCATION\RCM_TRRI_8200_Loader_Files\RCM_TRRI_8101_Loader_Fil
es\Text\en_US\ RCM_dashboard-view-strings-en_US
```

2. Set the configuration.manager.vendor.mode,  
configuration.manager.force.update.object.strings,  
configuration.manager.force.update.application.strings flags back to false

### **Manually loading changes for 8.2**

This section contains the manual steps for loading all the TRRI changes that were introduced in release 8.2.

### **Loading registry settings**

```
./ObjectManager.sh 1 c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_TRRI_8200_Loader_Files/Registry/
TRRI_registry_entries
```

This file creates all the registry settings that are required to configure the loading of Thomson Reuters regulatory events and library objects.

### ***Loading Regulatory Change Review Workflows***

```
./ObjectManager.sh 1 c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_TRRI_8200_Loader_Files/Schema/
RegulatoryChangeReviewWorkflow
```

```
./ObjectManager.sh 1 c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_TRRI_8200_Loader_Files/Schema/
TRRIRegulatoryChangeReviewWorkflow
```

```
./ObjectManager.sh 1 c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_TRRI_8200_Loader_Files/Schema/
TriggerChangeHorizonScanningWorkflow
```

The TRRI Regulatory Change Review Workflow gets triggered whenever a regulatory change (RegChange) object is created from a TRRIRegEvent object.

### **Manually loading changes for 8.2.0.1**

This section contains the manual steps for loading all the TRRI changes that were introduced in release 8.2.0.1.

### ***Loading the updated SubMandate system view for regulatory library objects***

This file includes an updated SubMandate system view, which is used for the TRRI Regulatory Library.

1. Set the ObjectManager.properties flags  
configuration.manager.vendor.mode = true  
configuration.manager.force.update.application.strings=true
2. Load the files with ObjectManager:

```
./ObjectManager.sh 1 c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_TRRI_8201_Loader_Files/View/ sv-Submandate

./ObjectManager.sh 1 c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_TRRI_8201_Loader_Files/View/ sv-app-string-
keys-Submandate
```

3. Set the configuration.manager.vendor.mode,  
configuration.manager.force.update.application.strings flags back to false

### ***(Optional) Load the updated Solution Object Model for TRRI***

This is not required by the TRRI Import feature to run. It is used for display purposes to show the TRRI Reg Series and TRRI Reg Event objects and their associations within the RCM object model

1. Set the ObjectManager.properties flags  
configuration.manager.vendor.mode = true  
configuration.manager.force.update.application.strings=true

2. Load the file with ObjectManager:

```
./ObjectManager.sh l c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_TRRI_8201_Loader_Files/Schema/
RCM_TRRI_solution_object_types
```

3. Set the configuration.manager.vendor.mode,  
configuration.manager.force.update.application.strings flags back to false

## Updating OpenPages profiles with Thomson Reuters Regulatory Library objects

In the following sections, we'll walk through the profile configuration and customization for the new field groups that have been added to the Mandate, SubMandate, and Requirement object types.

### Loading the entire RCM profile automatically

The changes for Mandate, SubMandate, and Requirement should also be applied to the specific profiles that clients use for RCM. For example, the RCM profile file in RCM\_TRRI\_8200\_Loader\_Files/Schema/RCM\_8200\_master-profile-op-config.xml contains the default RCM profile that's included in the fresh install with all the above changes. You can load that profile completely by using this command:

```
./ObjectManager.sh b c OpenPagesAdministrator <password>
FEED_FOLDER_LOCATION/RCM_TRRI_8200_Loader_Files/Schema/ RCM_8200_master-
profile
```

Or, you can update the profiles manually. See the next section in this document.

### Loading the RCM profile for Thomson Reuters manually

#### *Load the 8.1 profile changes*

1. Include the TRRIRegEvent and TRRIRegSeries object types into any profiles for users that need to see these objects.
  - o Ensure that after including the new types in the Profile that the **Navigational Views > Filtered List** view is enabled, and also that the **Object Views > Detail** view is made default.
  - o Fix display types and read only for included fields on TRRIRegEvent:

Field	Display Type	Read Only
RCM-TRRI-RegEv:Feed	Text	True
RCM-TRRI-RegEv:Feed ID	Text	True
RCM-TRRI-RegEv:Assignees	Multi Valued User Selector	<b>False</b>
RCM-TRRI-RegEv:Owner	User Selector	<b>False</b>
RCM-TRRI-RegEv:Title	Text	True
RCM-TRRI-RegEv:Summary	Text Area	True
RCM-TRRI-RegEv:TR Link	URL	True

Field	Display Type	Read Only
RCM-TRRI-RegEv:Ext Link	URL	True
RCM-TRRI-RegEv:TR Root Id	Text	True
RCM-TRRI-RegEv:Citation	Text	True
RCM-TRRI-RegEv:Applicability	List	<b>False</b>
RCM-TRRI-RegEv:CommDate	Date	True
RCM-TRRI-RegEv:PubDate	Date	True
RCM-TRRI-RegEv:EffDate	Date	True
RCM-TRRI-RegEv:FilingDate	Date	True
RCM-TRRI-RegEv:AdoptedDate	Date	True
RCM-TRRI-RegEv:Affected	Rich Text	True
RCM-TRRI-RegEv:Breached	Rich Text	True
RCM-TRRI-RegEv:Interpreted	Rich Text	True
RCM-TRRI-RegEv:Related	Rich Text	True
RCM-TRRI-RegEv:Analysis	Text Area	<b>False</b>
RCM-TRRI-RegEv:ApprovalDate	Date	True
RCM-TRRI-RegEv:BreadcrumbTrail	Text	True
RCM-TRRI-RegEv:Comments	Text	<b>False</b>
RCM-TRRI-RegEv:DocDate	Date	True
RCM-TRRI-RegEv:EnactedDate	Date	True
RCM-TRRI-RegEv:ExpDate	Date	True
RCM-TRRI-RegEv:ExpFutureDate	Date	True
RCM-TRRI-RegEv:SrcId	Text	True
RCM-TRRI-RegEv:TR Version Id	Text	True
RCM-TRRI-RegEv:TRPubDate	Date	True
RCM-TRRI-RegEv:ExecDate	Date	True
RCM-TRRI-RegEv:DataCaptureDate	Date	True
RCM-TRRI-RegEv:FileName	Text	True
RCM-TRRI-Taxonomy:ContentType	List*	True
RCM-TRRI-Taxonomy:Geography	List*	True

Field	Display Type	Read Only
RCM-TRRI-Taxonomy:Issuer	List*	True
RCM-TRRI-Taxonomy:Sector	List*	True
RCM-TRRI-Taxonomy:Themes	List*	True

\*Profile display type is List, but these fields are the "hierarchical enum" field data type and display differently in the Task Focused UI.

- For the **Navigational Views > Filtered List** of TRRIRegEvent click it and go to **Associated Filters** and include the filter My TRRI Regulatory Events. This is required for the filter to be available in the Task UI dashboards.
- Also include the new RCM-Mand|SubMand|Req:Citation fields for Mandate, SubMandate, and Requirement.

**Note:** For an example profile loader file that contains these object types for fresh installs, refer to the file  
FEED\_FOLDER\_LOCATION/RCM\_TRRI\_8200\_Loader\_Files/Schema/RCM\_8200\_master-profile-op-config.xml

2. In Role Templates, include the TRRIRegEvent and TRRIRegSeries object types in any applicable role template with permissions that are required by the users that will need to interact with the data. Also, to be able to configure and import the TRRI feed the user must have the permission <roleApplicationPermission name="All/SOX/Administration/TRRI Feed"/>

**Note:** For an example role template loader file that contain these object types for fresh installs, refer to the FEED\_FOLDER\_LOCATION/RCM\_TRRI\_8200\_Loader\_Files/Schema/OPS\_RCM\_roleTemplates-op-config.xml

### **Load the 8.1.0.1 profile changes**

For any Task UI views for the Mandate, SubMandate, and Requirement object types, include the new Citation field.

1. For the Task UI configurable dashboards, you might want to include the My TRRI RegEvents filter as a widget in your RCM users' default dashboard.

**Note:** For an example loader file that contains the RCM Dashboard for fresh installs, refer to the FEED\_FOLDER\_LOCATION/RCM\_TRRI\_8200\_Loader\_Files/Schema/OPS\_RCM\_roleTemplates-op-config.xml

2. By default, in a fresh install of RCM we disable the Add New feature for the TRRI Regulatory Event objects. To disable the button manually.
  - In the Task UI/Standard UI go to **Manage Settings**. Find /Applications/GRCM/Add New Wizard/Disable Add New Filtered List View Page Global Launch Points. Edit the value, append TRRIRegEvent, and save.
3. Add the new RCM-TRRI-Shared and RCM-TRRI-Taxonomy field groups to the Mandate, SubMandate, and Requirement object types for any profiles that need to see these objects.
  - Update the display type and read-only properties of the included fields. Do this for Mandate, SubMandate, and Requirement:

Field	Display Type	Read Only
RCM-TRRI-Shared:Breadcrumb Trail	Text	<b>False</b>
RCM-TRRI-Shared:TR Link	URL	<b>False</b>
RCM-TRRI-Shared:Pub Date	Date	<b>False</b>
RCM-TRRI-Shared:TR Pub Date	Date	<b>False</b>
RCM-TRRI-Shared:TR Root Id	Text	<b>False</b>
RCM-TRRI-Shared:Src Id	Text	<b>False</b>
RCM-TRRI-Shared:TR Version Id	Text	<b>False</b>
RCM-TRRI-Shared:File Name	Text	<b>False</b>
RCM-TRRI-Shared:Feed	Text	<b>False</b>
RCM-TRRI-Shared:Feed Id	Text	<b>False</b>
RCM-TRRI-Shared:Exec Date	Text	<b>False</b>
RCM-TRRI-Shared:Data Capture Date	Text	<b>False</b>
RCM-TRRI-Taxonomy:ContentType	*List	True
RCM-TRRI-Taxonomy:Geography	*List	True
RCM-TRRI-Taxonomy:Issuer	*List	True
RCM-TRRI-Taxonomy:Sector	*List	True
RCM-TRRI-Taxonomy:Themes	*List	True

\*The profile display type is List, but these fields use the "hierarchical enum" field data type and they're displayed differently in the Task Focused UI.

## Post-install steps

---

### Views

Most views loaded are disabled by design. Before enabling them, evaluate what their priority should be with respect to the customer's existing views.

### Scheduling

If you had added schedules for TRRI prior to upgrading to 8.2, your schedule will have been removed by the 8.2 installer. Go to the Thomson Reuters configuration screen and set that schedule again.

### Reporting framework

Because new fields have been added and changed in the OpenPages schema, it's a good idea to regenerate the reporting framework as a post-install step. Note that this step isn't required to run a TRRI import or to use the workflows.

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