

Configuration Management FAQs

Sam Menown - 2022-10-14 - Comments (0) - Autoform DM FAQs

Autoform DM

This article will answer some common questions related to the configuration management of Autoform DM (versions 9 and 10).

What are some common use cases for this feature?

Support may want to use the export tool to get extracts of customer configuration in order to triage issues. Implementation can be streamlined by building configuration locally ahead of time, testing, and then finally exporting ready for installation on the customer site.

Change rollout between environments can be reproduced automatically to reduce human error. The configuration .json file can be easily backed up or stored in version control (separate from the Autoform DM database), and used in cases of system replication.

What happens if an import contains breaking changes?

The import process ensures that Autoform DM never ends up in a 'broken' state; if there are any failures during the import, all changes will be rolled back. However, we still recommend using the Validate feature before importing to review what will be changed and ensure it matches expectations.

If the wrong changes are applied or the export contained something unintended, we recommend applying changes in a 'fix-forward' (ensuring the object is updated and maintained in the future after the initial launch) style approach. However, if the previous version of the full configuration is stored in version control, it can be re-applied using the following strategies in order to revert back:

- **Existing Item Strategy** - DELETE
- **Existing Relationship Strategy** - REPLACE

Is there anything configuration management does not handle?

Configuration management in Autoform DM is focused on the core configuration set, this excludes document state and anything relevant to that. For this reason, any changes that

would result in the destruction of document data, such as the deletion of 'in use' document definitions, will result in a validation/import failure.

Client applications contain a large binary component and therefore cannot be installed via configuration management. However, user/group access to them can be exported and updated.

Users also require some manual interaction within CREATE to provide a temporary password.

The following configuration is not currently included:

- Address book entries
- Email settings
- Print settings

Are pre-built configuration packs available?

We will provide base configuration packs to ease the configuration of specific functionality such as Autoform DM Client applications. These packs will be documented as part of the application configuration manual and provided with each release of the app.

If a pack is not provided for your required feature, or you have a pack that you think should be shared, [contact us](#)