



WeWebU OpenWorkdesk 3.1.0.0
Community Edition

Create Solutions with OpenWorkdesk

Tutorial

Copyright

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Typographical Conventions used in this Manual

Convention	Example
Standard	Standard Text
Important terms	OpenECM-Framework
Classes	OwApplicationContext
Methods	<code>getName()</code>
Source Code	<code>public void myMethod() {}</code>
Comments in Source Code	<code>// simple source code comment</code>
Java Package	<code>com.wewebu.server.app</code>
Plugins	<code>com.wewebu.ow.server.plug.owdemo.owmain</code>
Path	<code>com/wewebu/ow/server/...</code>
XML Tag	<code><VirtualFolderDescription></code>
XML Attribute	<code>name=</code>
XML value	<code>search</code>
Internal link to other chapters in the document	Introduction
External link to other documents	[INST_GUIDE], chapter 2 Installing the Configurator
External link to a web resource	www.OpenWorkdesk.org/guides
<i>Product-specific terms</i>	<i>Add Document</i>

Formatting legend for brackets in Source Code, Paths, File Names, etc.:

Ellipsis (...): Parameter the user must supply

Between brackets [...]: Optional items

Between braces {...}, choices separated by pipe |, example: {even|odd}: Set of choices from which the user must choose only one

The following placeholders are used in this document:

- (Delivery) The downloaded OWD Community Edition
- (OpenWorkdesk) Root directory of OWD deployment
- (Tomcat) Installation directory of your Apache Tomcat application server



1. Welcome

Thank you for using WeWebU OpenWorkdesk Community Edition. This tutorial is designed to help you building up your own business applications with OpenWorkdesk in a few steps and to enable you to quickly set up several different configurations.

This document describes step by step the configuration and building process for setting up your own solution containing eFile Management, Search and Retrieval and a personal inbox.

This tutorial provides a general approach about how to create your own solution. It references to the OpenWorkdesk documentation to get more and deeper information. The documentation can be obtained at

<http://openworkdesk.org/guides>

after registration as described below.

If you have any problems, please visit our forum at

<http://openworkdesk.org/phpbbforum>

and browse the different threads.

However, if you want get the most out of your OpenWorkdesk installation please register and become an active member of the OpenWorkdesk community.

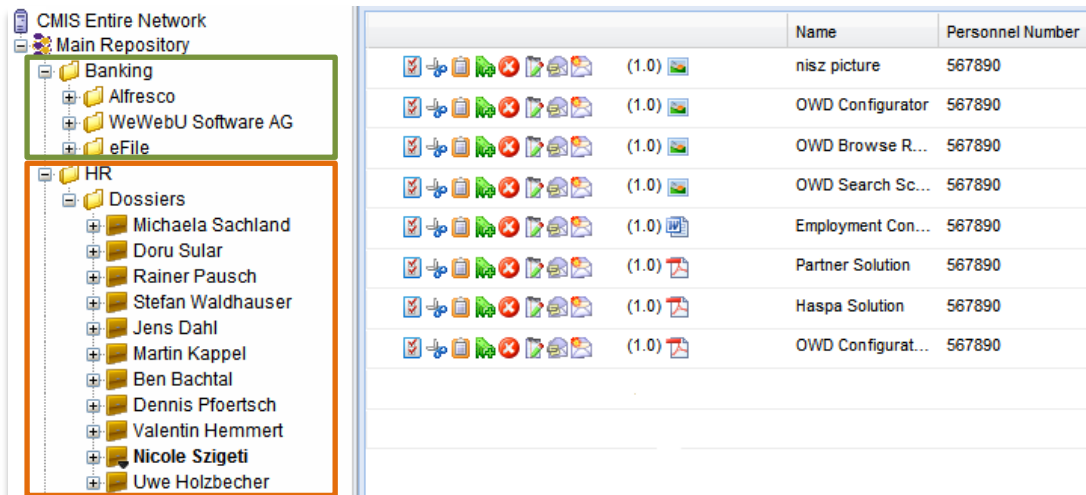
It is quite easy and takes just a few seconds. Just use the "REGISTER" button top right on the page, fill out the form and submit the registration. Shortly afterwards you'll receive a confirmation e-mail with your account information. Once you are logged in, you will be given permission to post your own questions and suggestions in the forum and even the possibility to comment on other community members' posts.

Please keep in mind that this tutorial can only provide a first impression of OpenWorkdesk configuration but does not cover all features and capabilities of OpenWorkdesk. For getting a deeper insight use the documentation or use the forum.



2. Goal

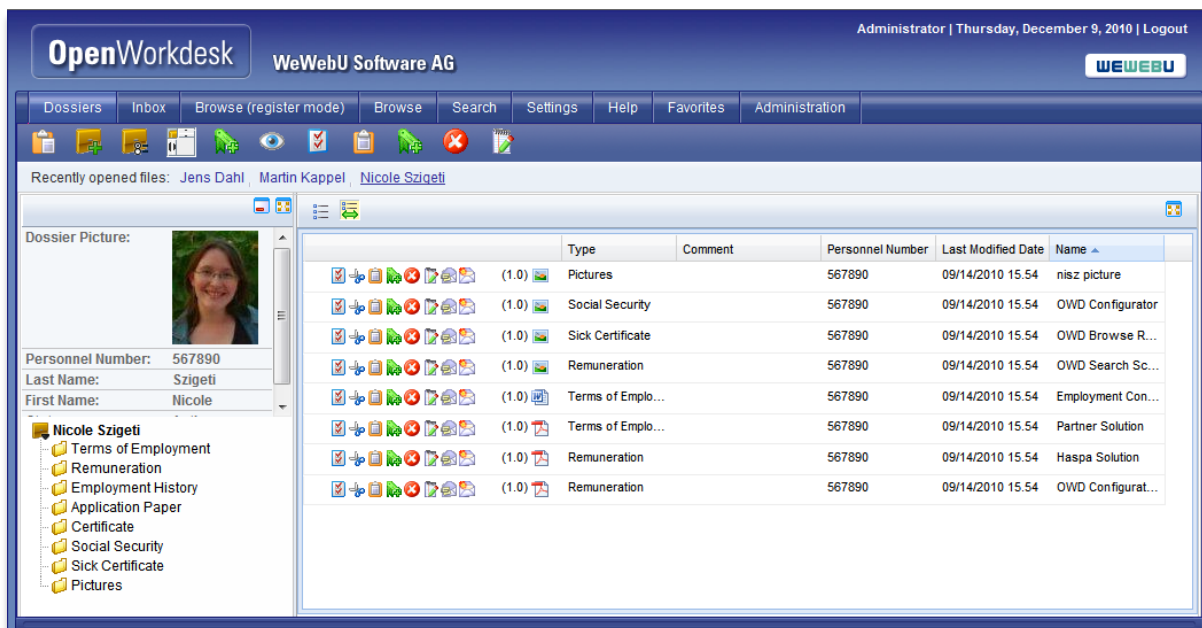
Let's imagine that a running instance of Alfresco already contains an existing file structure which consists of files and related documents like the following view. This could be a structure in context of HR, Banking, Insurance or anything else.



	Name	Personnel Number
(1.0) [Icons]	nisz picture	567890
(1.0) [Icons]	OWD Configurator	567890
(1.0) [Icons]	OWD Browse R...	567890
(1.0) [Icons]	OWD Search Sc...	567890
(1.0) [Icons]	Employment Con...	567890
(1.0) [Icons]	Partner Solution	567890
(1.0) [Icons]	Haspa Solution	567890
(1.0) [Icons]	OWD Configurat...	567890

Figure 1: Existing File Structure


The goal of this tutorial is to create an own business application in the context of Human Resources (HR) Management, but can be adapted to every other solution like Credit Files and so forth.



OpenWorkdesk WeWebU Software AG Administrator | Thursday, December 9, 2010 | Logout

Navigation: Dossiers | Inbox | Browse (register mode) | Browse | Search | Settings | Help | Favorites | Administration

Recently opened files: Jens Dahl | Martin Kappel | Nicole Szigeti

Dossier Picture: 

Personnel Number: 567890
Last Name: Szigeti
First Name: Nicole

File List:

Type	Comment	Personnel Number	Last Modified Date	Name
(1.0) Pictures		567890	09/14/2010 15.54	nisz picture
(1.0) Social Security		567890	09/14/2010 15.54	OWD Configurator
(1.0) Sick Certificate		567890	09/14/2010 15.54	OWD Browse R...
(1.0) Remuneration		567890	09/14/2010 15.54	OWD Search Sc...
(1.0) Terms of Emplo...		567890	09/14/2010 15.54	Employment Con...
(1.0) Terms of Emplo...		567890	09/14/2010 15.54	Partner Solution
(1.0) Remuneration		567890	09/14/2010 15.54	Haspa Solution
(1.0) Remuneration		567890	09/14/2010 15.54	OWD Configurat...

File Structure (Left Panel):

- Nicole Szigeti
 - Terms of Employment
 - Remuneration
 - Employment History
 - Application Paper
 - Certificate
 - Social Security
 - Sick Certificate
 - Pictures

Figure 2: eFile View – Human Resource View



3. Prerequisites

Before starting you should check the prerequisites which are recommended for working with this tutorial.

3.1. Alfresco Knowledge

You should already have experiences with Alfresco backend repository, specifically regarding the data model of Alfresco.

3.2. First touches with OpenWorkdesk

This tutorial should assist you getting experienced with OpenWorkdesk but you should have made the first steps working through the [Quickstart Guide](http://www.OpenWorkdesk.org) available on <http://www.OpenWorkdesk.org>.

3.3. Running OpenWorkdesk

Prerequisite for this tutorial is a deployed instance of at least OpenWorkdesk Community Edition, but also users of OpenWorkdesk Professional or Enterprise Edition can work with this tutorial.

To get more information about the differences of the three editions of OpenWorkdesk check the Edition Matrix at <http://www.openworkdesk.org/editions>.

Nevertheless OpenWorkdesk must have access to an in-house Alfresco repository. In some cases it could be that some modifications on backend's data model are necessary so an administrative access to the Alfresco repository is recommended but not mandatory.

You can download the OpenWorkdesk Community Edition on <http://www.OpenWorkdesk.org>. Either the [Quickstart Guide](#) will assist you by setting up a running OpenWorkdesk environment with access to an Alfresco repository or you can use the [Installation Guide](#) – available at <http://www.OpenWorkdesk.org/guides> – to install an instance of OpenWorkdesk from scratch. Advantage of using the [Installation Guide](#) is that you get more useful knowledge concerning how to build solutions.

3.4. Existing Data Model in Alfresco

A business application is always based on an existing data model and structure consisting of files and folders in the backend. This means - as mentioned in [chapter 2](#) - that the backend must contain a structure in a context like Banking, Insurance, Human Resources or something else. In some cases



there are some modifications in the data model necessary so administrative access to Alfresco backend is recommended.

4. Basic Configuration

OpenWorkdesk's functionality is provided at the user interface level via a set of **Plugins** which are highly configurable and can furthermore be instantiated in different configurations.

To get more information about the **Plugin Concept** please consult the [\[CONF_GUIDE\] chapter 4.1 Plugin Concept](#).

The basic configuration of OpenWorkdesk Community Edition contains and provides the complete set of plugins with default settings.

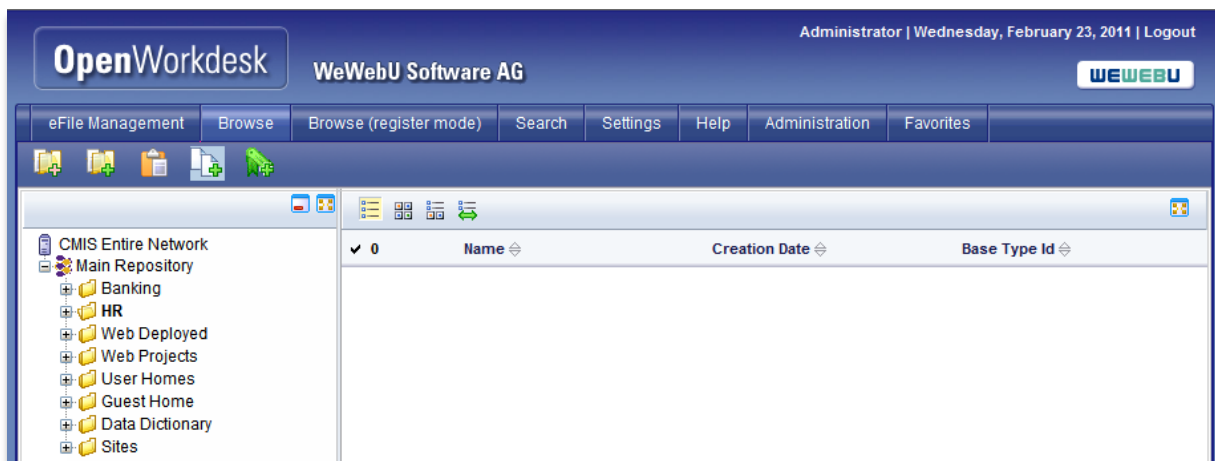


Figure 3: *Browse Plugin*

OpenWorkdesk serves a set of different **Master Plugins** but one type of master plugin can have multiple instances with different configurations and functional focus.

The default configuration offers the plugins *eFile Management* and *Browse* which are in fact instances of the same *plugin* (see picture above). Both provides access to folders, documents and other objects of the underlying ECM system(s); through configuration it can be specified per instance how these contents are presented to the user, e.g. within hierarchies of folder objects or within virtual folder structures, as physical or virtual eFiles, displaying preview information of an eFile and so forth.



Plugin	Description
eFile Management	Provides both view and context of an eFile, e.g. the Employee Dossier (see also http://www.openworkdesk.org/screenshots)
Browse	Allows browsing through the whole repository or even multiple repositories, dependent on the connection configuration of OpenWorkdesk. Support for multiple repositories is only supported with Enterprise Edition (see also http://www.openworkdesk.org/editions).
Browse Register Mode	Provides the same functionality as the Browse Plugin above but in slightly a different presentation.
Search	Provides search templates configured by an administrative user. Search templates can be designed to search for folders, documents or other objects.
Settings	Allows the user to specify some user-specific settings like window positions, clipboard behavior, plugin-specific settings, etc.
Help	Provides context-sensitive help.
Favorites	Users can bookmark documents, folders, objects and can save a query. These bookmarked artifacts are saved and listed in this plugin.

Table 1: Types of Plugins



5. Create new Scenario

The OpenWorkdesk manages its configuration in 3 configuration files and additional custom files like search templates.

Since we want to create a new solution beside the existing ones (for example HR Scenario) we need to create a new configuration. The following chapter describes the structure and how to create a new one.

For more information regarding the folder structure required by OpenWorkdesk see also [\[DEV_MAN\] chapter 4.1.1 Overview of Directory Structure](#).

5.1. Description of Configuration Structure

OpenWorkdesk maintains the configuration in 3 configuration files.

owbootstrap.xml

This file contains settings for

- Connection to the ECM repository (in this case Alfresco)
→ see also [\[INST_GUIDE\] chapter 5.2 ECM Adapter Activation](#)
- Field Controls
→ see also [\[CONF_GUIDE\] chapter 11.7 Standard Field Controls](#)
→ see also [\[DEV_MAN\] chapter 9.1 Field Manager](#)
- Database Connections
→ see also [\[INST_GUIDE\] chapter 5.4 Database Connection](#)
- Different Managers
→ see also [\[DEV_MAN\] chapter 9.2 History Manager](#)
→ see also [\[DEV_MAN\] chapter 9.3 MIME Type Manager](#)
- Role Manager (Professional and Enterprise Edition only)
→ see also [\[INST_GUIDE\] chapter 6.2 Role Manager](#)
→ see also [\[CONF_GUIDE\] chapter 6.4 Role Manager](#)
→ see also [\[DEV_MAN\] chapter Create and Extend Role Manager](#)
→ see also Edition Matrix at <http://www.openworkdesk.org/editions>
- Provided Languages
→ see also [\[CONF_GUIDE\] chapter 5.2 Language Support and 4.2.5 Custom Localization](#)
→ see also [\[DEV_MAN\] chapter 10.2 Support of additional Languages](#)



owplugins.xml

This file contains all provided and instantiated plugins including their settings and configurations.

See also [\[CONF_GUIDE\] chapter 4.1 Plugin Concept](#).

owmimetable.xml

This file defines what is supposed to happen, when a user clicks on an object. For more information see [\[CONF_GUIDE\] chapter 11.9 owmimetable.xml](#).

All these files reside by default in a folder location corresponding with the enabled ECM Adapter respectively in the folder defined in *web.xml*.

```
<web-app>
  <context-param id="OwResourceFilePath">
    <param-name>OwResourceFilePath</param-name>

    <!-- Configuration "dummy": Test environment -->
    <!--<param-value>deploy#WEB-INF/conf/dummy</param-value>-->

    <!-- Configuration CMIS: Example for CMIS adapter. -->
    <param-value>deploy#WEB-INF/conf/cmis</param-value>

    <!-- Configuration CMIS: HR Scenario. -->
    <!--<param-value>deploy#WEB-INF/conf/cmis_hr</param-value>-->

    <!-- Configuration CMIS: Banking Scenario. -->
    <!--<param-value>deploy#WEB-INF/conf/cmis_banking</param-value>-->
  </context-param>
  <!-- Use OwResourceFilePathEnvironmentVarName to retrieve the path to t
  from a System.properties() environment variable instead reading it
  If set, this path override the OwResourceFilePath param.
  Please see the documentation of OwResourceFilePath for general con
```

Figure 4: Adapter Configuration in *web.xml*

According to the definition in the code fragment provided above the configuration files are located in the following folder:

(OpenWorkdesk)\WEB-INF\conf\cmis

Beside the configuration OpenWorkdesk maintains search forms and definitions for virtual folder structures and are defined in so-called search templates. These search templates are managed in



OpenWorkdesk. In the configuration file **owbootstrap.xml** – already mentioned above – is defined, where these templates are located.

```
<OwApplicationObjectBaseDir>WEB-INF\cmis</OwApplicationObjectBaseDir>
```

In the default configuration the templates reside at

(OpenWorkdesk)\WEB-INF\cmis\.

Each of these configuration folders – of course there can be multiple instances of these folders – contains three subfolders

Folder	Description
owsearchtemplates	Contains the search templates which appear in OpenWorkdesk's Search Plugin . See also Figure 7 . Creating a new search template will be also part of chapter 8 Create a Search Template .
other	A physical folder in an eFile view can be extended by a virtual folder substructure. This substructure is defined in XML and these templates reside in this folder. Creating a virtual structure will be part of chapter 6.2 Extending the eFile View with a virtual substructure .
owpreferences	Some of the user preferences are stored in this folder, but you don't have to care about it.

Table 2: Template Folder Structure

5.2. Create new Configuration

Since we want to create our own business application we have to create a new configuration area where we can create a new scenario beside and independent from the existing ones.

Step 1:

Navigate to path **(OpenWorkdesk)\WEB-INF\conf** and copy the existing folder **cmis** and paste it in the same directory. Rename this folder with a name you want like **"MyFirstScenario"**.

Step 2:

Navigate to path **(OpenWorkdesk)\WEB-INF** and open the file **web.xml**.

Adapt the following section according to your naming, in the example **"MyFirstScenario"**.



```
<context-param id="OwResourceFilePath">
  <param-name>OwResourceFilePath</param-name>

  <!-- Configuration CMIS: My own first configuration. -->
  <param-value>deploy#WEB-INF/conf/MyFirstScenario</param-value>
</context-param>
```

Step 3:

Create a new folder in directory **(OpenWorkdesk)WEB-INF** which will contain the search and virtual templates and name it for example **"MyFirstScenarioTemplates"**.

In this new folder please create the following three folders. Please ensure correct spelling.

```
└─ [MyFirstScenarioTemplates]
   └─ other
      └─ owpreferences
         └─ owsearchtemplates
```

In the next chapters these folders will be filled with templates you will create.

Step 4:

Navigate to folder you created in step 1, open the file **owbootstrap.xml** and adapt the following element according to the folder name you chose in step 3, in this example **MyFirstScenarioTemplates**.

```
<OwApplicationObjectBaseDir>
  WEB-INF/MyFirstScenarioTemplates/
</OwApplicationObjectBaseDir>
```

Finished

We created a new configuration area where we can build up our own business application. The following chapter will assist you.



6. Create new eFile Master Plugin

This chapter describes how to create and configure a new eFile master plugin for managing and working with electronic files and get a focused view of an HR File.

For more Information about plugins and its concept please consult the [\[CONF_GUIDE\] chapter 4.1](#) and [chapter 4.4](#) for detailed information about eFile concept.

6.1. Create a new Plugin

The first step is the creation of a new eFile plugin to be able to provide a focused view on a specific context, in this case an HR File.

For creating a master plugin we will use the *WeWebU OpenWorkdesk Configurator*. For more information about using the Configurator please consult first the

[\[INST_GUIDE\] chapter 8 Installing the OWD Configurator](#)

and then

[\[CONF_GUIDE\] chapter 2 WeWebU OpenWorkdesk Configurator.](#)

There are two options for creating a new plugin. Either you use an existing plugin as template and copy its instance or you can use the wizard for creating a complete new instance of a master plugin

6.1.1. Option 1: Copy existing instance

You can use an existing plugin and adapt it to your needs. Just do a right click on an existing master plugin, in this case *eFile Management* and copy and paste it.

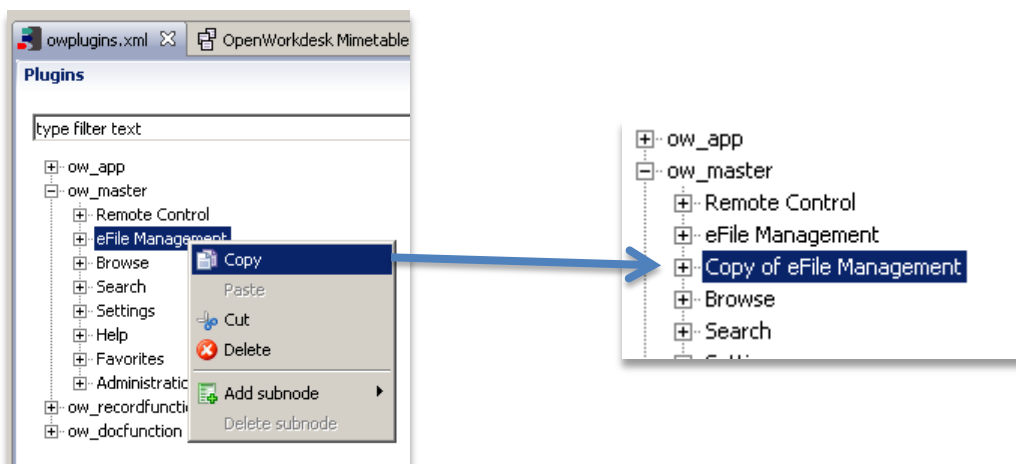



Figure 5: New Plugin Instance with OpenWorkdesk Configurator



Afterwards the new instance of the copied plugin can be configured (see [chapter 6.1.3](#))

6.1.2. Option 2: Create new instance

A new plugin can also be created by using the wizard. Use the green plus () in the top. Afterwards a dialog appears for specifying the parameters of the plugin.

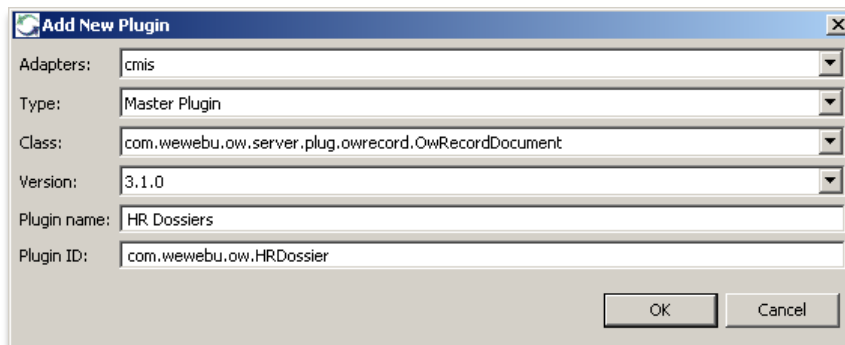


Figure 6: *Plugin Wizard*

Use a descriptive name and ID for the parameters Plugin name and Plugin ID. After the creation of a new instance the plugin can be configured in the next chapter.

6.1.3. Configuration of Plugin

The purpose of the new plugin should be to view files of functional context for example customer files, application files, HR Dossiers and so forth. Typically these files are contained in a specific folder in the backend like **/HR/Dossiers**.

For this reason to display these files in the new plugin we define the *StartupFolder* where the files are located, according to the following screenshot.



Details...	
<input type="checkbox"/> HR Dossiers	
Name	HR Dossiers
id	com.wewebu.ow.HRDossier
Description	Manage HR Dossiers
Vendor	WeWebU Software AG
Version	3.0.0
ClassName	com.wewebu.ow.server.plugin.owrecord.OwRecordDocument
ViewClassName	com.wewebu.ow.server.plugin.owrecord.OwRecordView
helppath	
icon	
RecentRecordList	<input checked="" type="checkbox"/>
showDisabledRecordFunctions	<input checked="" type="checkbox"/>
LockObject	<input checked="" type="checkbox"/>
StartupFolder	/Main Repository/HR/Dossiers/
MaxChildSize	200
MaxSizeMax	200
MaxRecentRecordSize	4
JspForm	
DisplayFoldersInResultList	<input type="checkbox"/>
@type	ow_master

Figure 7: Plugin Parameter

The WeWebU OpenWorkdesk Configurator contains a very comprehensive online help which describes all the parameters of a plugin. Consult the integrated help by simply selecting the root node of the plugin and press *F1* to get information about the specific parameters and subnodes of a plugin. For more information about configuration see also [\[CONF_GUIDE\] chapter 4.1.2 Instantiation and Configuration](#).

After changes to the configuration have been saved, the new settings have to be reloaded to make them available to OpenWorkdesk.

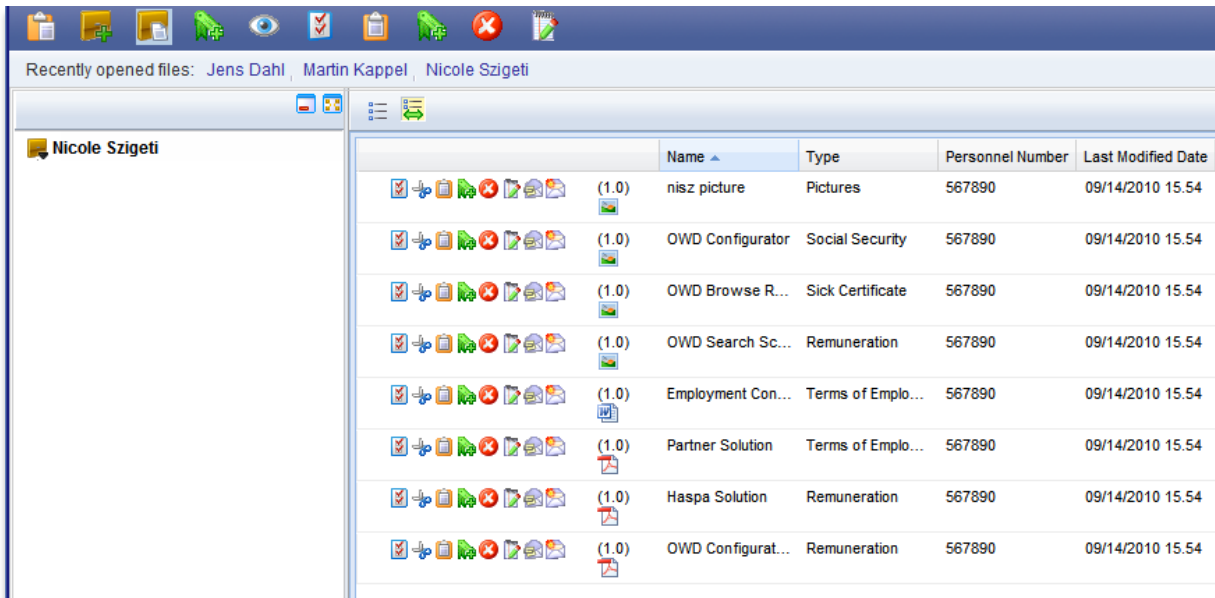
All configuration settings are cached in OpenWorkdesk so after any changes to configuration files (e.g. [owplugins.xml](#), [owbootstrap.xml](#), [owmimetable.xml](#)) you have to make it available to OpenWorkdesk by updating the changes. Just click on the appropriate button in the **Settings Plugin** in OpenWorkdesk according to following screenshot and logout/login.

Configuration:	<p>Plugin and MIME Configuration</p> <p><input type="button" value="Update"/> After editing Plugin and MIME configurations (owplugins.xml and owmimetable.xml), they must be updated in OpenWorkdesk. Reload the changes here. The changes will then be available to all users with the next log-in.</p> <p>Boot Configuration</p> <p><input type="button" value="Update"/> After changing the boot configuration (owbootstrap.xml), it must be updated in OpenWorkdesk. Reload the changes here. They are then available to all users after the next log-in.</p>
----------------	---

Figure 8: Reloading of Settings in OpenWorkdesk



After reloading you can find the new master plugin with a simple view on an eFile. At this time there's no context-specific view but we passed the first step for creating a focused presentation. The current view should look like the following picture.



Recently opened files: Jens Dahl, Martin Kappel, Nicole Szigeti

Nicole Szigeti

	Name	Type	Personnel Number	Last Modified Date
(1.0)	nisz picture	Pictures	567890	09/14/2010 15.54
(1.0)	OWD Configurator	Social Security	567890	09/14/2010 15.54
(1.0)	OWD Browse R...	Sick Certificate	567890	09/14/2010 15.54
(1.0)	OWD Search Sc...	Remuneration	567890	09/14/2010 15.54
(1.0)	Employment Con...	Terms of Emplo...	567890	09/14/2010 15.54
(1.0)	Partner Solution	Terms of Emplo...	567890	09/14/2010 15.54
(1.0)	Haspa Solution	Remuneration	567890	09/14/2010 15.54
(1.0)	OWD Configurat...	Remuneration	567890	09/14/2010 15.54

Figure 9: Created eFile Plugin

⚠ If you use the Professional or Enterprise Edition of OpenWorkdesk and using the Role Manager you additionally have to assign the new master plugin to a role or group. See [CONF_GUIDE] chapter 6.4 Role Manager to get more information.

To obtain a more specific file structure we will extend the HR File with a virtual file structure in the next chapter.

6.2. Extending the eFile View with a virtual substructure

The created master plugin shall provide the focused view in the right context (HR, Banking, etc.).

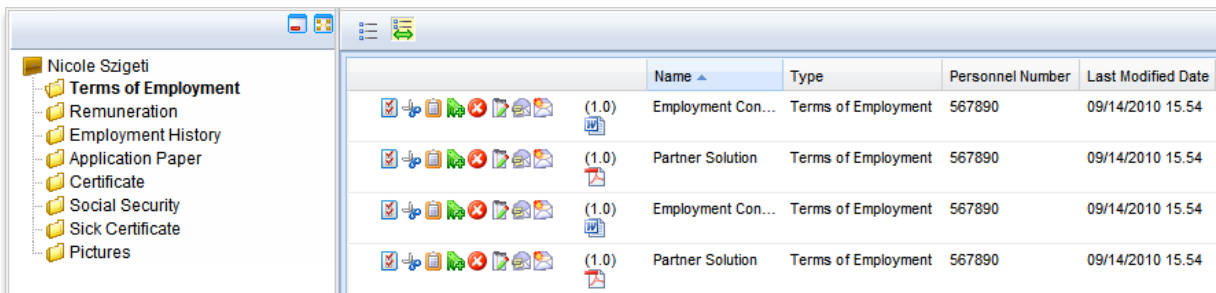
OpenWorkdesk supports different concepts for the implementation of eFiles :

- Physical eFiles
- Semi-Virtual eFiles
- Virtual eFiles

For detailed information about physical, semi-virtual and virtual file structures please consult the [CONF_GUIDE] chapter 4.4 eFiles.



In the next step we want to extend the physical root node with a virtual substructure, so we will create a so called Semi-Virtual eFile. This means in dependence of document properties, for example a document type, the documents should be filed into a respective virtual folder. Relating to the following screenshot documents with type *Terms of Employment* appears in the respective virtual sub-folder *Terms of Employment*.



Name	Type	Personnel Number	Last Modified Date
Employment Con...	Terms of Employment	567890	09/14/2010 15.54
Partner Solution	Terms of Employment	567890	09/14/2010 15.54
Employment Con...	Terms of Employment	567890	09/14/2010 15.54
Partner Solution	Terms of Employment	567890	09/14/2010 15.54

Figure 10: Virtual Folder Structure

Such templates are defined in XML. The chapter 4.4.3 Setup in [CONF_GUIDE] describes how to setup a semi-virtual eFile and you can find the sample template **dossiertemplate.xml** from the screenshot above either in your deployment at (OpenWorkdesk)\WEB-INF\cmis_hr\other\ or in the OpenWorkdesk Community Edition download package.

6.3. Define Preview Properties

Commonly every traditional paper file provides information about the contents on top of the file.

In OpenWorkdesk this information is referred to as so-called *Preview Properties* which are provided above the folder hierarchy.

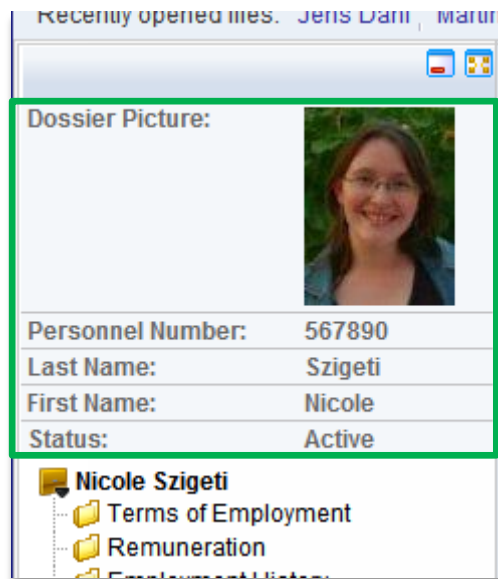


Figure 11: Preview Properties

This definition is performed per master plugin in the Configurator. In the subnode (*MasterPlugin*) → *settingset* → *previewproperties* you can define all the properties you want to view at a glance but of course only properties which are part of the folder definition in the backend's data model can be specified as preview properties.

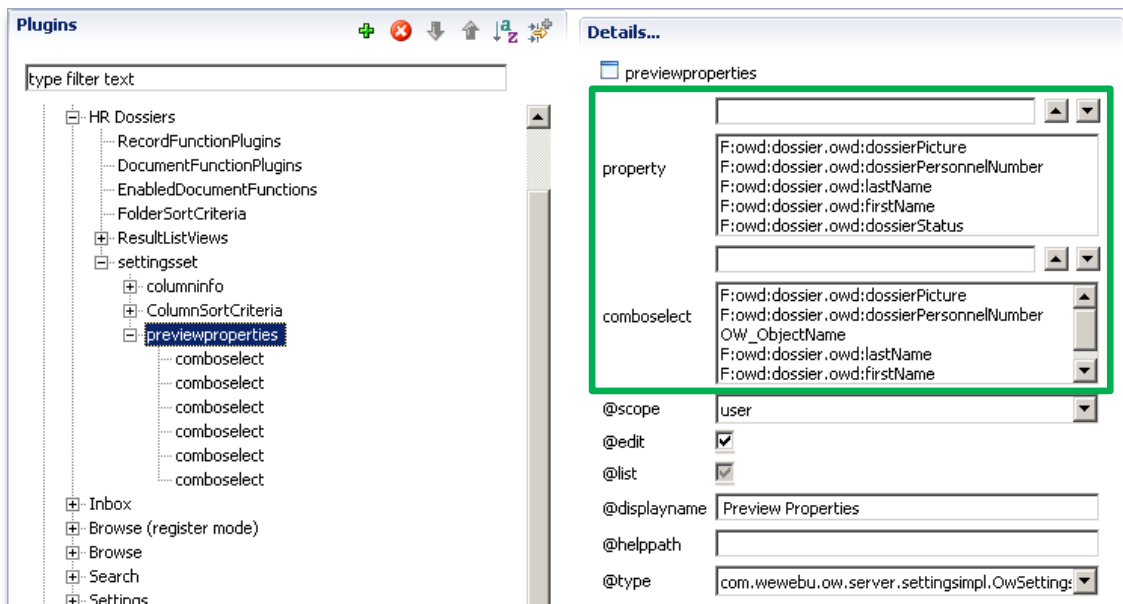


Figure 12: Configure Preview Properties

For more information consult the integrated help pages of OpenWorkdesk. Select master plugins root node and press F1, chose *subnodes* and look for the category *previewproperties*.



Figure 13: *OpenWorkdesk Configurators detailed help*

Afterwards we have created a functional focused eFile view.

7. Define Mime Types

As known from operating systems like Windows it defines the behavior how a specific file type respectively format is handled. A MS Word document for example opens with MS Word or Open Office Writer, a JPEG file opens with an image application, etc.


OpenWorkdesk can maintain such relationships of Mime Type behaviors for documents but also for folders. This means for example that a folder respectively eFile of type *HRDossier* has to be opened with the master plugin *HR Dossiers* and not with another plugin like *Browse* or *Contract Files*.

Imagine that you do a search and it returns a list of HR Dossiers. You click on one result and expect that it opens in the respective master plugin *HR Dossiers*. This behavior has to be defined also in OpenWorkdesk Configurator in the configuration file **owmimetable.xml**. See also [\[CONF_GUIDE\] chapter 4.2.2.1 Master Plugins and eFile Plugins](#).

For more information about using Configurator see [\[CONF_GUIDE\] chapter 2 WeWebU OpenWorkdesk Configurator](#).

For more information about file **owmimetable.xml** see [\[CONF_GUIDE\] chapter 11.9 owmimetable.xml](#).

Open the file **owmimetable.xml** from your configuration folder **(OpenWorkdesk)\WEB-INF\Conf-Folder** defined in **web.xml** (see chapter [5.2 Create new Configuration](#)) by using the Configurator.

Use the green plus button () in the top to add a new Mime Type.



According to the following screenshot start with `ow_folder/` and type the name of the folder class defined in backend's data model.



Figure 14: Add Mime Type

Select as *Mime Type Action* the *Master Plugin ID*. With the three dots button on the right side you can select the master plugin with which the eFile respectively the folder class defined above should be opened.

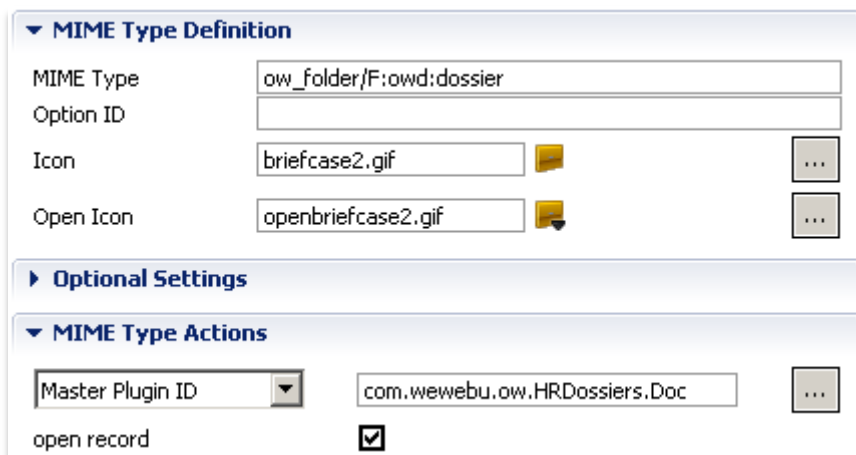


Figure 15: Mime Type Parameter

Refer also to the help system of Configurator by pressing F1 to get more information about the other parameters.

- ⚠ **Always reload the settings after changing the OWD configuration by using the Settings master plugin!**



8. Create a Search Template

One of the main purposes of an ECM System is of course search and retrieving documents, folders and other objects.

For this reason this chapter supports you by creating a new search template.

First of all consult the [\[CONF_GUIDE\] chapter 4.8 Search Templates](#) which describes quite comprehensively which options are available for a search template. [\[CONF_GUIDE\] chapter 11.8 Setting up Search Templates](#) describes the structure of a search template.

The OpenWorkdesk download package also contains a lot of examples in

[WEB-INF\dummy\owsearchtemplates\](#)

The search templates used for the HR Application are located at

[WEB-INF\cmis_hr\owsearchtemplates\](#)

and can also be used as examples.

After creating and saving the search template in its respective configuration folder it is available in OpenWorkdesk.

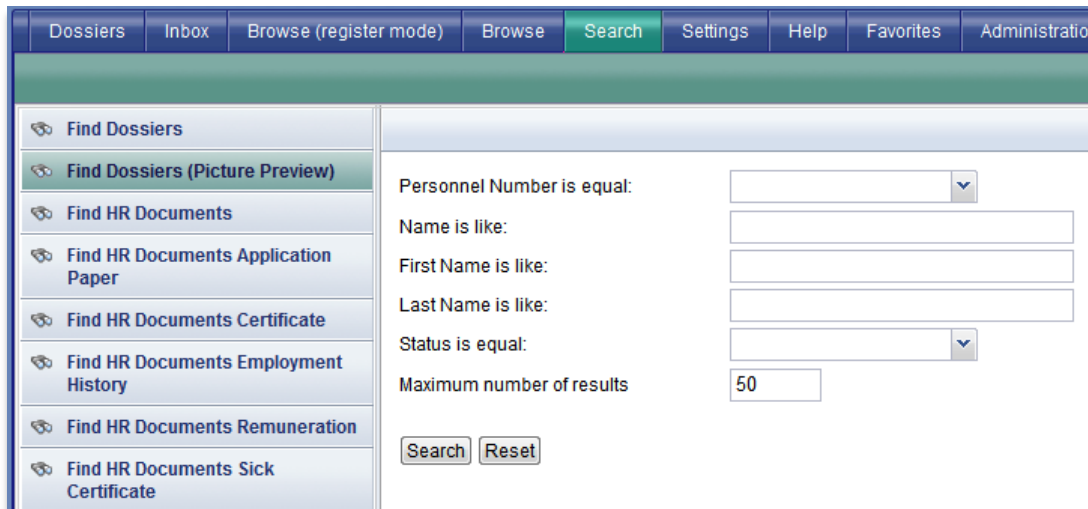


Figure 16: Search Templates

⚠ If you use the Professional or Enterprise Edition of OpenWorkdesk and using the Role Manager you additionally have to assign the new master plugin to a role or group. See [\[CONF_GUIDE\] chapter 6.4 Role Manager](#) to get more information.



If you created a search template for searching eFiles like HR Dossiers, Customer Files or something like this do a search and try to open this eFile. According to [chapter 7 Define Mime Types](#) should open in the master plugin defined in the Mime Type.

9. Create new Record Plugin

We also want to be able to create a new eFile like an HR File. For this purpose we have to create and configure a new **Record Plugin** for creating in this case a new HR File.

More information about different types of plugins is provided in [\[CONF_GUIDE\] chapter 4.1.1 Types of Plugins](#).

As you already know for creating a new record plugin we use the *OpenWorkdesk Configurator*. See [chapter 6.1 Create a new Plugin](#) how to create a new plugin, in this case of type record plugin.

Specify an appropriate *Plugin Name*, *ID* and *Description*. Additionally specify the *ObjectClass* which defines of which type the new folder is. This specification relates to the data model defined in the backend. At last specify where the new files shall be created respectively saved by specifying the *ParentObject*.

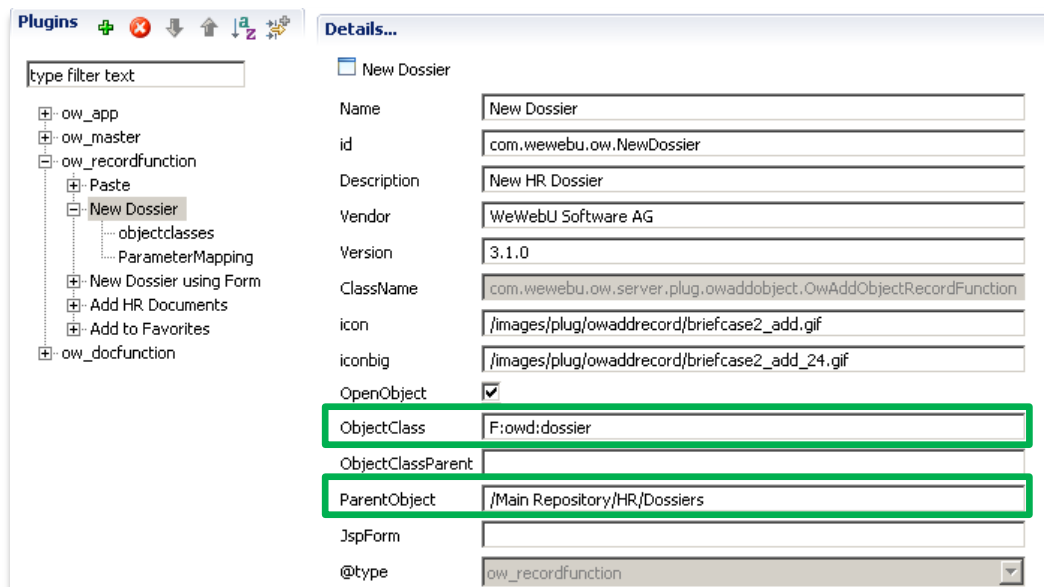


Figure 17: Configuration of new Record Plugin for creating an eFile



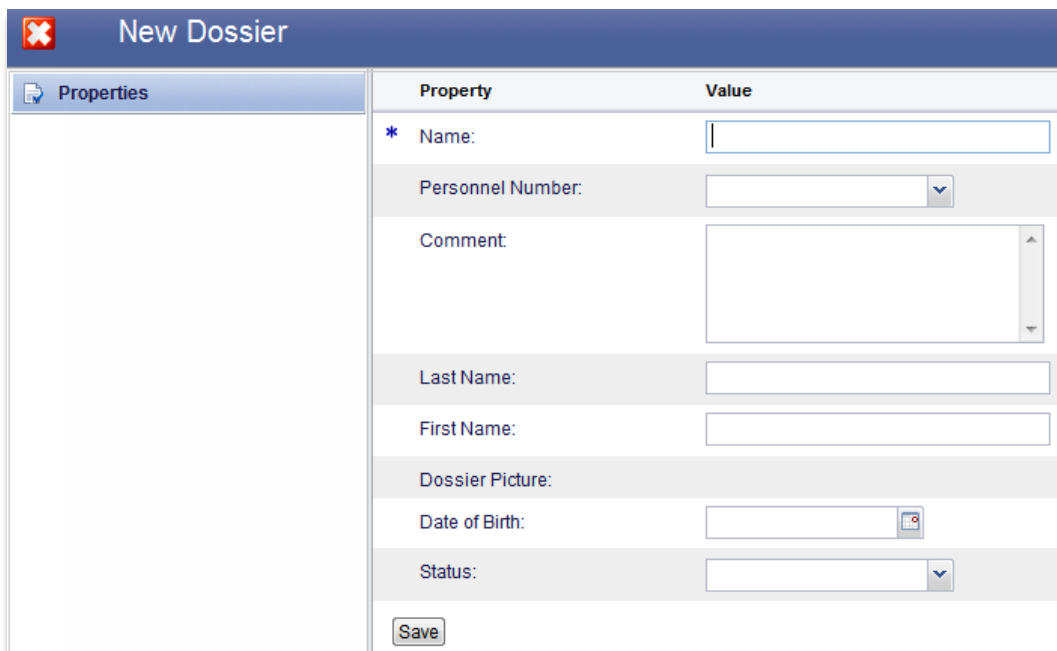
Consult also the integrated help of Configurator to get more information about all the other parameters.

After configuring the new record plugin – in this case “New Dossier” – there appears a new icon in the *Record Plugins Bar* below the *Master Plugins Bar*.



Figure 18: Record Plugin available in OpenWorkdesk

After clicking on this plugin a new dialog opens where the parameters of the new eFile can be specified.



Property	Value
* Name:	<input type="text"/>
Personnel Number:	<input type="text"/>
Comment	<input type="text"/>
Last Name:	<input type="text"/>
First Name:	<input type="text"/>
Dossier Picture:	<input type="text"/>
Date of Birth:	<input type="text"/>
Status:	<input type="text"/>

Figure 19: Creation form for new eFile

Depending on the configuration of this plugin (Parameter *OpenObject*) the new eFile opens directly after saving. Otherwise it can be found by a search and can be opened.

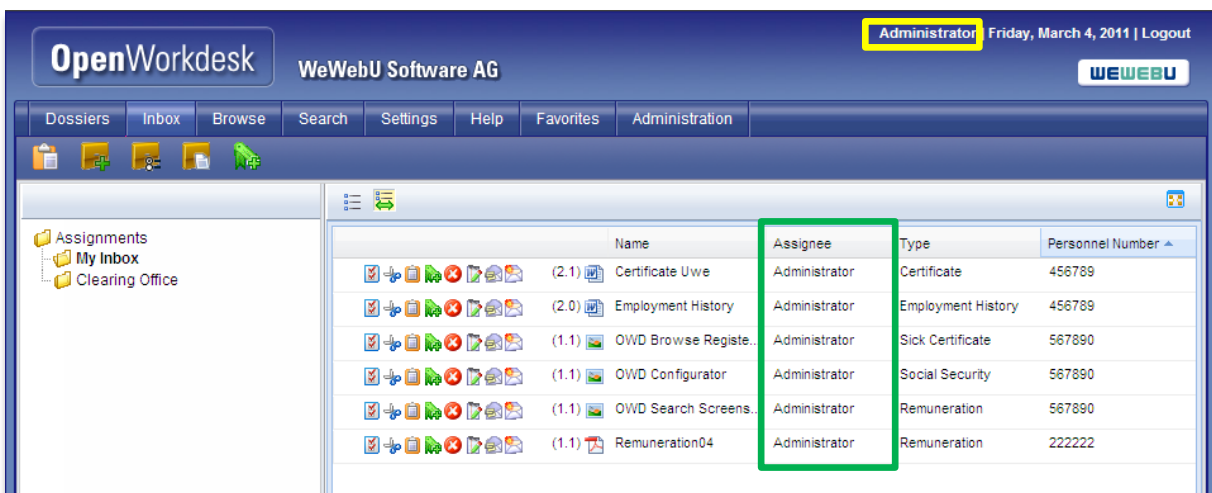


10. Create a personal Inbox by using virtual folders

By using and creating a master plugin which represents only virtual nodes and folders it is possible to provide a consolidated view of files and documents from different sources. For example in a virtual folder all documents from all HR Files of type “Terms of Employment” are listed in one view.

See also the [\[CONF_GUIDE\] chapter 4.5 and 4.6](#) for more information about virtual folders and the concept.

It is also possible to create a master plugin which provides a personal inbox so documents from eFiles like HR Dossiers or Customer Files can be assigned from others or yourself to a personal or group inbox. In the personal inbox all documents which are assigned to you appears in your personal inbox as you can see in the following picture.



Name	Assignee	Type	Personnel Number
(2.1) Certificate Uwe	Administrator	Certificate	456789
(2.0) Employment History	Administrator	Employment History	456789
(1.1) OWD Browse Registe..	Administrator	Sick Certificate	567890
(1.1) OWD Configurator	Administrator	Social Security	567890
(1.1) OWD Search Screens..	Administrator	Remuneration	567890
(1.1) Remuneration04	Administrator	Remuneration	222222

Figure 20: Personal Inbox

All the folder elements which are available on the left side of the screenshot above are purely virtual. None of these folders exist in the backend repository. The documents appear in dependence of the documents' metadata.

Example: One virtual node is defined that all documents respectively objects which have the value *Contract* for the metadata *Document Type* appears in the virtual node/folder *Contracts*.

First of all we start with creating a template which represents the virtual folder structure. This template is very comparable with a search template (see also [chapter 8](#)



Create a Search Template). For more information see also [CONF_GUIDE] chapter 11.8.3 Virtual Folder Definition.

We will create a new template defined in XML. You can use the following example as a template for the definition of your virtual folder structure. The following example uses the metadata `D:owd:hrdocument.owd:Assignee` as indicator to whom the document is assigned to. This metadata is referenced with a constraint which appears as drop down list in OpenWorkdesk.

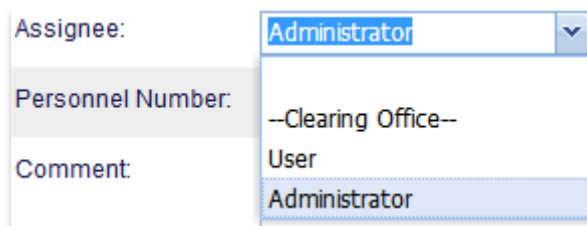


Figure 21: Constraint / Drop Down

If your current data models does not contains such a metadata like *Assignee* it has to be added or you also can use another metadata like *document type*, *priority*, *policy id*, *agency id*, *processing status* and so forth. Nevertheless metadata you've chosen should be referenced with a constraint.

```
<?xml version="1.0" ?>
<VirtualFolderDescription>

  <root name="Assignments" containsdocs="false">

    <search versionselection="currentversion">

      <objectstores mergeoption="union">
        <objectstore name="Main Repository" />
      </objectstores>

      <from>
        <class symname="document" />
        <!-- <class symname="folder" /> -->
      </from>

      <select>
        <selectprops>
          <selectprop symname="cmis:document.cmis:name" />
          <selectprop symname="D:owd:hrdocument.owd:documentPersonnelNumber"/>
          <selectprop symname="D:owd:hrdocument.owd:hrDocumentType" />
          <selectprop symname="D:owd:hrdocument.owd:Assignee" />
          <selectprop symname="cmis:document.cmis:lastModificationDate" />
          <selectprop symname="D:owd:hrdocument.owd:documentComment" />
        </selectprops>
      </select>

      <where>
```



```

        <and>
          <like>
            <whereprop editproperty="hidden"
              symname="D:owd:hrdocument.owd:Assignee">
            </whereprop>
          </like>
        </and>
      </where>

      <subclasses>
        <subclass objecttype="document" symname="D:owd:hrdocument" />
      </subclasses>

    </search>

    <node name="My Inbox" containsdocs="true">
      <refinecriteria>
        <literal symname="D:owd:hrdocument.owd:Assignee">{username}</literal>
      </refinecriteria>
    </node>
    <node name="Clearing Office" containsdocs="true">
      <refinecriteria>
        <literal symname="D:owd:hrdocument.owd:Assignee">
          --Clearing Office--
        </literal>
      </refinecriteria>
    </node>
  </root>
</VirtualFolderDescription>

```

After creating your template save it according to [chapter 5.2 Create new Configuration](#) in your template directory in folder **other**. You can choose a name you want like **Assignments.xml**.

The next step is the creation of a new master plugin according to [chapter 0](#)



Create new eFile Master Plugin.

Since we do not access a physical folder we specify for parameter *StartupFolder* the value *vf=[TemplateName.xml]*, in accordance to the example above *vf=Assignments.xml*.

Additionally disable the option *RecentRecordList* and disable the *RecordFunctionPlugins* by unchecking the *enable* option below the list of record plugins (see following picture).

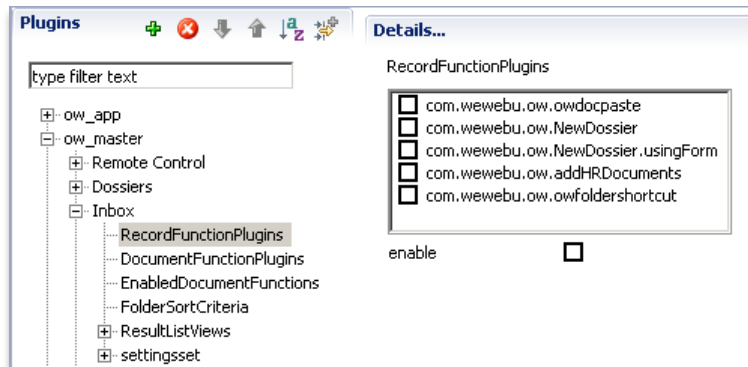


Figure 22: Disable RecordFuntionPlugins

Your new master plugin is ready for use. As already mentioned in chapter [6.1.3 Configuration of Plugin](#) remember to load the new settings in OpenWorkdesk.

11. Other Plugins

OpenWorkdesk provides a set of useful plugins out of the box which equips OpenWorkdesk with a wide range of functionality.

The following table lists some of the standard plugins and should give you an overview of features included in the Community Edition of OpenWorkdesk.

Plugin	Description
Add to Favorites	Allows you to bookmark documents, folders or other objects. These bookmarks appear in the master plugin Favorites.
Check-in Check-out Cancel Check-out	Allows you to check out a document, modify it and check it in again. If you made no changes or don't want to check in the document you can cancel the check-out and keep the content in its former version.
Copy	OpenWorkdesk contains a built-in clipboard. This allows you to copy selected documents and paste them at another location.
Cut	Same as Copy but creates no new instance of object but moves it to another location.
Delete	Deletes selected document(s), folder(s) or object(s) but only if you have the needed permission from backend.
Download	Download one or more selected files to your local system. If more than



	one document is selected the documents will be downloaded in a zip file.
E-Mail Link	Send an URL Link or more links in case of multiple selected documents as email via MS Outlook or Lotus Notes. These links point directly to the documents. The recipient can call these links; OpenWorkdesk opens and asks for the credentials (unless in Single Sign-On scenarios). After login the document opens directly. The advantage of sending a link is that only the recipient which has the permission to view the content can access and open the document. The second is of course preventing duplicates so everybody works on the same version and no duplicates will be created.
Enter Note	Configure one meta data field as note field. This plugin use this metadata field to store notes, saves and views the previous notes and adds the username and timestamp to each entry.
Mass Edit Properties	If you want to modify one or more properties of multiple documents at once you can use this plugin. Simply select multiple documents, call the plugin, and modify for example the metadata field <i>Processing Status</i> from <i>New</i> to <i>Completed</i> and the <i>Processing Status</i> will be assigned to all selected documents.
...	...

Table 3: Useful Plugins

The Professional and Enterprise Version of OpenWorkdesk contain additional plugins which are not available in the Community Version.

Plugin	Description
Drag & Drop	You simply select documents from your Desktop, drag and drop them directly into the OpenWorkdesk user interface. A dialog opens where you can provide the metadata for the added document(s).
Send as Attachment	Allows you to send selected document(s) as attachment via MS Outlook or Lotus Notes either as zip file in case of multiple documents or unzipped in case of a single document.
...	...

Table 4: Professional and Enterprise Plugins

To get more information about the differences between the three OpenWorkdesk editions please consult the homepage at <http://www.openworkdesk.org/editions>. A Matrix compares the provided features in Community, Professional and Enterprise Edition.

12. Conclusion

Now after your walk through of the Quickstart Guide and this tutorial you have made first experiences with OpenWorkdesk and saw how easy it is to work with OpenWorkdesk and even building and configuring your own solutions.



But of course that's not all. OpenWorkdesk provides a lot of more in the standard. Consult also the Installation Guide and Configuration Guide to learn more about the standard features of OpenWorkdesk and the added values of both the OpenWorkdesk Pro and Enterprise Editions.

With OpenWorkdesk's incorporated OpenECM Framework and UI Framework you're able to extend the functionalities and its layout. You can write new plugins, interface with other applications, retrieve information from another databases, and much more.

The extensibility is only limited by your fantasy.

And of course the highly skilled staff of WeWebU professionals services or of WeWebU partners can help you getting out the most of your installation of OpenWorkdesk. (Licensing of either OpenWorkdesk Pro or Enterprise Edition required.)

Get in contact with WeWebU by sending a mail to contact@wewebu.de and or giving us a call at +49 (9132) 836600 or select one of our partners listed at <http://www.wewebu.de/en/partner/consulting.html>





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15. Bibliography

The following documentation is used in this tutorial and available at
<http://www.openworkdesk.org/guides>

[INST_GUIDE] → OpenWorkdesk Installation Guide
[CONF_GUIDE] → OpenWorkdesk Configuration Guide
[DEV_MAN] → OpenECM-Framework Developer Manual