

WeWebU OpenWorkdesk 3.0.0.0

Configuration and Planning Guide

Copyright

WeWebU Software AG
Hauptstr. 14
91074 Herzogenaurach
Germany

Phone: +49 (9132) 83660 - 0

E-Mail: contact@wewebu.de

<http://www.wewebu-software.com>



Version 1.0

Status: Approved

Author: WeWebU Software AG

Typographical Conventions Used in This Manual

Convention	Example
Standard	Standard Text
Important terms	OpenECM-Framework
Classes	OwAppContext
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 Attribute	<code><node></code>
XML value	<code>value</code>
Internal link to other chapters in the document	Introduction
External link to other documents	INST, chapter "Installing the Configurator"
<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:

- (OpenWorkdesk) - root directory of OWD deployment.
- (Workplace) - root directory of IBM FileNet P8Workplace deployment.
- (Websphere) - installation root of Websphere application server.
- (Tomcat) - installation root of Tomcat application server.
- (JBoss) - installation root of JBoss application server.
- (ContentManager) - installation root of IBM Content Manager.

Table of Contents

1	Introduction	5
1.1	ABOUT THIS DOCUMENT	6
2	WeWebU OpenWorkdesk Configurator (OWD Configurator)	7
2.1	HOW TO USE THE CONFIGURATOR	8
3	Overview	10
3.1	ARCHITECTURE	10
4	GUI Layer	12
4.1	PLUGIN CONCEPT.....	12
4.1.1	Types of Plugins	12
4.1.2	Instantiation and Configuration	13
4.2	GENERAL UI CONCEPTS	15
4.2.1	Design.....	15
4.2.2	Layout	16
4.2.3	Clipboard.....	22
4.2.4	Warnings and Error Messages	23
4.2.5	Custom Translation and Localization	24
4.2.6	Highlighting and Priority Rules.....	25
4.2.7	Touch Indicator Plugin (Only for OWD Enterprise and Professional Edition)	26
4.2.8	Property Field Order	27
4.3	REMOTE CONTROL INTERFACE (ONLY FOR OWD ENTERPRISE AND PROFESSIONAL EDITION)....	28
4.3.1	Standard Remote Control URL Format	28
4.3.2	Short Remote Control URL Format	30
4.4	EFILES.....	31
4.4.1	eFiles and Roles (Only for OWD Enterprise and Professional Edition).....	32
4.4.2	Comparison between different Implementations	33
4.4.3	Setup.....	34
4.5	VIRTUAL FOLDERS.....	37
4.6	DOCS@WORK	38
4.7	BPM (ONLY FOR OWD ENTERPRISE EDITION)	38
4.7.1	Setting Up the BPM Master Plugin	38
4.7.2	Setting Up Exposed Fields	39
4.7.3	Virtual Queues and Forwarding	39
4.7.4	Priority Rules.....	41
4.7.5	Metadata Filters	42
4.7.6	Step Processors	42
4.7.7	Proxy Mechanism	44
4.7.8	Resubmission of Work Items	44
4.7.9	Providing Notelogs.....	45
4.8	SEARCH TEMPLATES	46
4.8.1	Areas where Search Templates are used	46
4.8.2	Cross Adapter Support (Only for OWD Enterprise or Professional Edition)	48
4.8.3	Format, Generation and Location	50
4.8.4	Availability per Role (Only for OWD Enterprise or Professional Edition)	51
4.9	CUSTOM JSPS AND HTML FORMS.....	51



4.9.1	Creating custom JSPs	53
4.9.2	HTML Layout	54
5	Core Application Layer	55
5.1	DESIGNS	55
5.2	LANGUAGE SUPPORT	55
5.3	RELABELING	55
5.3.1	Maintenance of String Resources	56
5.3.2	Debug Mode	56
5.3.3	Adjusting Strings	57
6	Generic ECM Layer	59
6.1	CONTROLLING FIELDS	59
6.2	HISTORY MANAGER (ONLY FOR OWD ENTERPRISE OR PROFESSIONAL EDITION)	60
6.2.1	DB History Manager	61
6.3	MIME TYPE MANAGER	62
6.4	ROLE MANAGER (ONLY FOR OWD ENTERPRISE OR PROFESSIONAL EDITION)	63
6.4.1	Master Roles	64
6.5	TENANT MANAGER (ONLY FOR OWD ENTERPRISE OR PROFESSIONAL EDITION)	65
6.5.1	Selective Configuration	66
7	ECM Adapter Layer	67
8	List of Figures	68
9	List of Tables	69
10	List of Code Fragments	70
11	Appendix	71
11.1	ECM APPLICATION DESIGN & DEPLOYMENT PROCESS	71
11.2	CONFIGURATION OF THE DEPLOYMENT	72
11.3	CONFIGURATION OF THE SOLUTION	72
11.4	FORMAT OF DMS IDS	74
11.4.1	DMS ID of FNCM Adapter	74
11.4.2	DMS ID of FNIM Adapter	76
11.4.3	DMS ID of IBMCM Adapter	76
11.4.4	DMS ID of IBMOD Adapter	77
11.4.5	DMS ID of JCR Adapter	78
11.4.6	DMS ID of Dummy Adapter (for testing and development)	78
11.5	STANDARD PLUGINS	78
11.6	FIELDS FOR DIFFERENT CONFIGURATIONS OF HISTORY MANAGER	79
11.7	STANDARD FIELD CONTROLS	80
11.7.1	Example	80
11.8	SETTING UP SEARCH TEMPLATES	84
11.8.1	Embedding XML Structure	85
11.8.2	The SELECT Block	88
11.8.3	Virtual Folder Definition	93
11.9	OWMIMETABLE.XML	93
12	Bibliography	95



1 Introduction

WeWebU OpenWorkdesk (OWD) is a suite of Enterprise Content Management (ECM) applications with a web-based, intuitively usable ECM front-end.

Using OWD, even users who have no or little experience with ECM systems can use state-of-the-art ECM functionalities without much training effort. OWD application is accessible via any internet browser, thus it is not necessary to install the framework on every client machine. Within one browser frame window, users can comfortably switch between document retrieval, eFile management and case management and easily access data from integrated external third-party applications. According to the fine-granular security and user roles concept, the user is provided with functions for which he is authorized and needs them to complete his tasks. OWD provides a series of features which make working with the ECM system more productive, e.g. shortcuts, context menus, import of documents via drag & drop, multiple languages and a complete online help. Its standard functions can easily be customized according to the individual needs of the customers.



WeWebU OpenWorkdesk is available in three editions. The Community Edition provides user-friendly applications for eFile management and retrieval and supports all CMIS-enabled ECM systems. It can be downloaded for free and is licensed under the GNU Public License. The early availability of Community Edition releases allows using the latest features very fast. Customers can use the Community Edition to develop their own solutions and system integrators can build their own vertical applications on top of WeWebU OpenWorkdesk.

Who ever needs professional assistance, service and support or is searching for an ECM solution with little pre-invest can subscribe for WeWebU OpenWorkdesk Pro Edition. It is licensed according to a subscription model based on the number of processors used in the application server. Customers subscribing to the Pro Edition get full professional support from either WeWebU directly or our highly qualified reselling partners. Both WeWebU's or a partners' professional services organisation efficiently help to create a complete solution that exactly fulfils the customer's needs. WeWebU OpenWorkdesk Pro Edition comes with support for one single CMIS repository, powerful role management, drag & drop and e-mail integration. WeWebU Zero-Install Office Integration and an advanced document viewing option are available as billable add-ons.

The highest demands on functionality, versatility, security, and performance are fulfilled by WeWebU OpenWorkdesk Enterprise Edition. It provides additional native adapters for IBM ECM and BPM systems as well as CMIS and JCR. Furthermore, it includes enterprise features like multitenancy, federation and audit trail, WeWebU Zero-Install Office Integration, advanced document viewing

options and broad support from WeWebU. If you want to get the most out of your ECM systems and have a large number of users, this is the edition of choice.

1.1 About this Document

This Configuration Guide describes how to plan and configure an installation of WeWebU OpenWorkdesk. It is assumed that you have a profound knowledge of the ECM-related requirements of your projects and a general understanding of the technical environment in which OpenWorkdesk is to be deployed. This Configuration and Planning Guide is a prerequisite for both, the Installation Guide [INST] and the Development Guide [DEV] of OpenWorkdesk.

Most of the configuration for WeWebU's OpenWorkdesk is done with the OpenWorkdesk Configurator, a software utility that is briefly described in chapter 2 **WeWebU OpenWorkdesk Configurator (OWD Configurator)**.

Chapter 3 **Overview** provides a basic introduction of the OpenWorkdesk's architectural foundation, the Open ECM Framework. You can use this chapter as a quick reference, as for each of its tiers and components detailed information can be found in subsequent chapters and sections. A general overview of OpenWorkdesk's GUI Layer is given in chapter 4 **GUI Layer**. Chapter 5 discusses the **Core Application Layer**. The **Generic ECM Layer** is described in chapter 6. In chapter 7, the **ECM Adapter Layer** is explained.

In the Appendix you can find the chapter **11.1 ECM Application Design & Deployment Process**, which outlines the typical steps in the course of an implementation of an ECM solution.

This document has been written to support you in your planning and configuration activities.

We would be grateful to receive your feedback, questions or remarks at contact@wewebu.de in order to continuously improve it – thank you!



2 WeWebU OpenWorkdesk Configurator (OWD Configurator)

In many cases, customer requirements can be met just by configuration. The OWD Configurator provides you with a graphical interface which allows you to conveniently perform the upcoming configuration tasks such as:

- for **owplugins.xml**:
 - create new instances of plugins
 - configure existing plugins
 - define the order in which plugins appear
- for **owmimetable.xml**:
 - define actions for MIME types



Fig. 1) WeWebU OpenWorkdesk Configurator startup screen

Further information about the OWD Configurator is available at [\[INST, chapter “Installing the Configurator”\]](#).

⚠ Be aware: You can also edit [owplugins.xml](#) and [owmimetable.xml](#) directly with some text editor, but you might accidentally corrupt these XML files.

2.1 How to Use the Configurator

Open the OWD Configurator, navigate to the desired configuration, e.g. **(Deployment Root)/WEB-INF/conf/fncm/owplugins.xml** and double-click on **owplugins.xml** or **owmimetable.xml** in order to open/edit them.

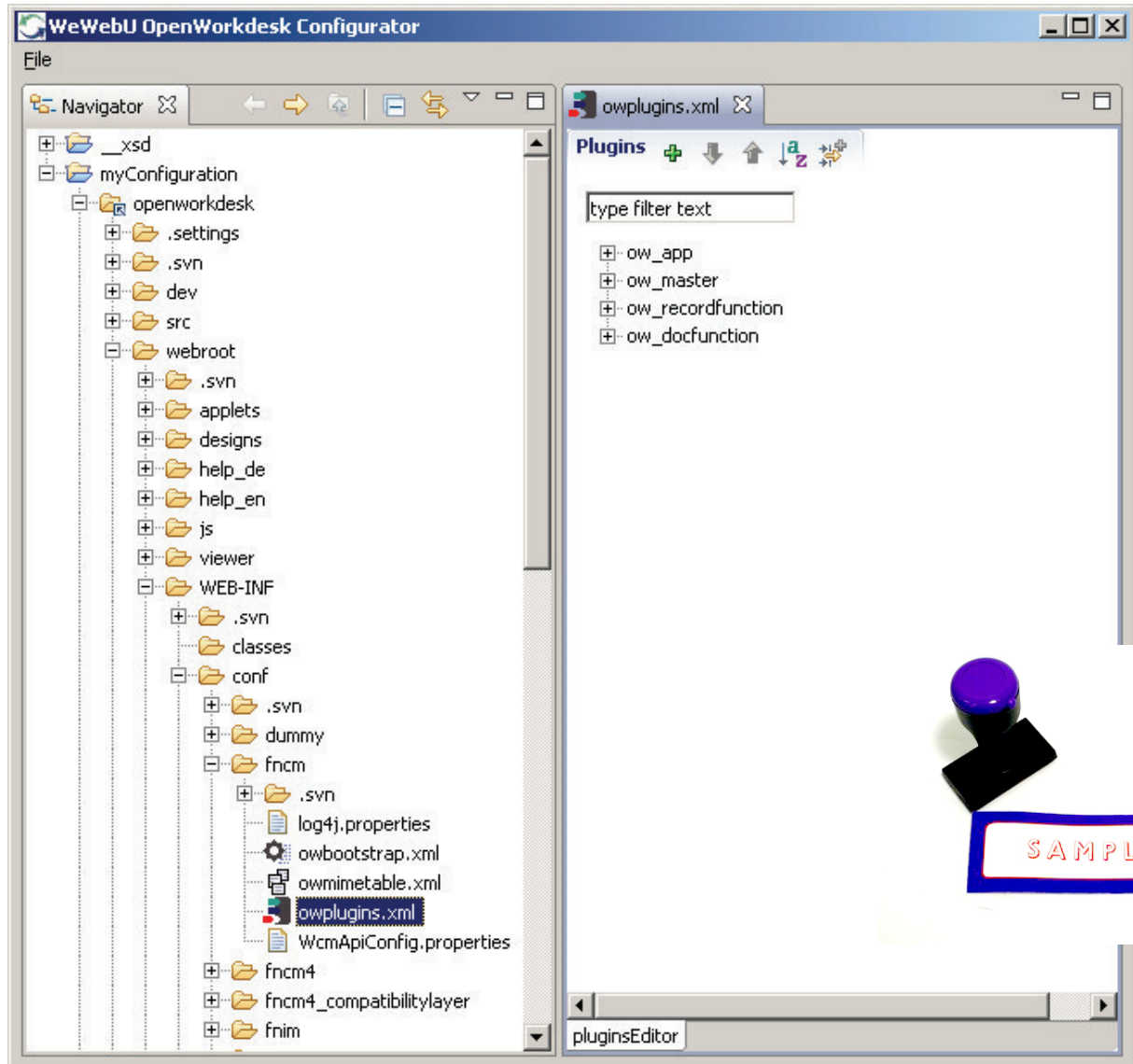


Fig. 2) Configurator with opened owplugins.xml

You can now edit existing plugins, add new ones (+) or modify the display order (sort plugins); change grouping of plugins).

By using the arrows () , you can define the order of appearance in the deployed application.

Note: The move plugin up and down buttons (↓ ↑) only work if grouping is disabled.

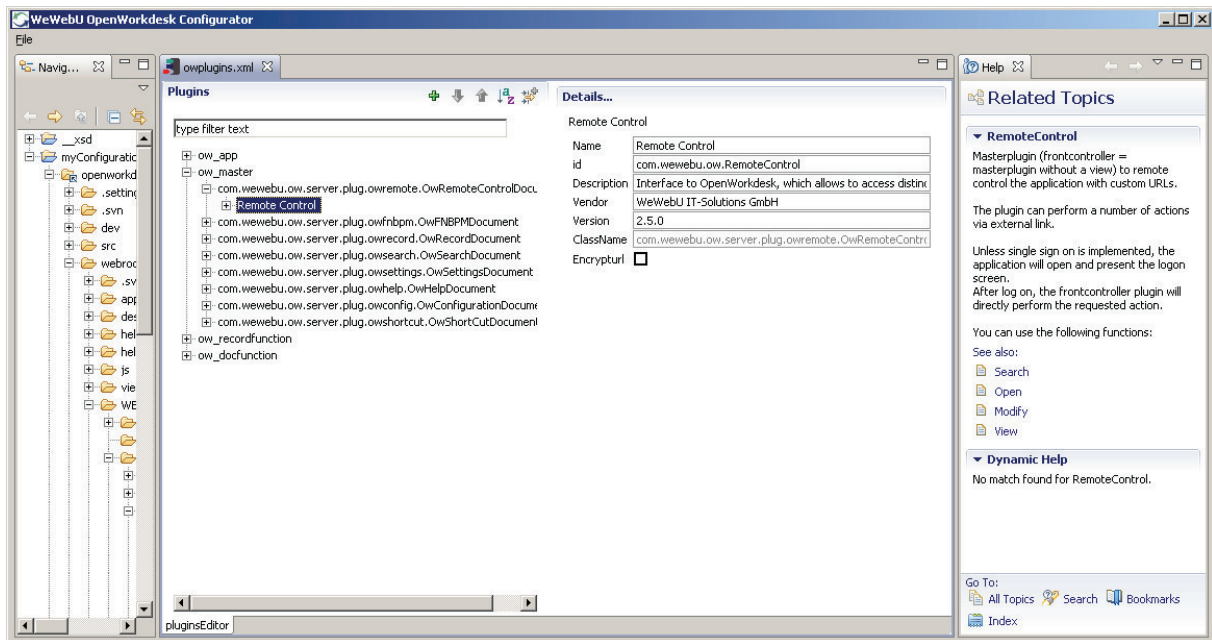


Fig. 3) Change a plugin with the Configurator

Note: You can obtain help for a specific plugin by pressing F1 if and only if this plugin itself is selected.

The Configurator provides a tree view, which allows to browse within the virtual structure defined by the grouping, down to the level of plugins and even below to the element level. The selected plugin is displayed on the “Details...” panel where the configuration parameters can be changed.

The “Details...” panel always displays only configuration elements which have simple content. This means, if an element or a subnode of a plugin has got a complex structure then it is displayed in the tree view as a selectable tree node.



If you want to read more and want to get the most out of your OpenWorkdesk installation go to <http://www.openworkdesk.org/> and register by clicking at the "REGISTER" button on the top right side of the page. Afterwards you can download the full version of this document and other documentation from <http://www.openworkdesk.org/guides> . Furthermore you can post comments and questions in the forum at <http://www.openworkdesk.org/phpbbforum> . Give it a try!

