Content Manager

Software Version 23.3

WebDrawer

opentext™

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Introduction

WebDrawer is a sample implementation of a Web Application built on top of the Content Manager Service API. It is simply an installable set of Razor templates giving users the ability to search, browse, retrieve, view, request and complete actions on records in the Content Manager database.

WebDrawer is composed of the following parts:

- Content Manager database
- Razor templates
- hptrim.config file
- CSS and JavaScript files
- Client browser

The WebDrawer Server transfers requests from the browser to the database and then returns the results using the templates to the browser, which displays them.

This section describes the requirements for installing and running the Content Manager WebDrawer Server and for creating and modifying the template files.

Supported Platforms and Prerequisites

See **CM23.3_Spec.pdf** in your Content Manager installation folder for the hard- and software requirements for Content Manager WebDrawer Server.

Installation Methods

You can choose to install the WebDrawer in the following ways:

- By using an interactive, graphical user interface. This can be run from:
  - the Setup Wizard or
  - an .msi package
- By using the command line or a command line script to run an .msi package

The interactive, graphical user interface (GUI), installation method is best suited to smaller or demonstration environments where you have a limited number of machines.

The command line method is suited to situations where you have to roll out Content Manager to a large organisation and you're using a deployment tool like Active Directory.

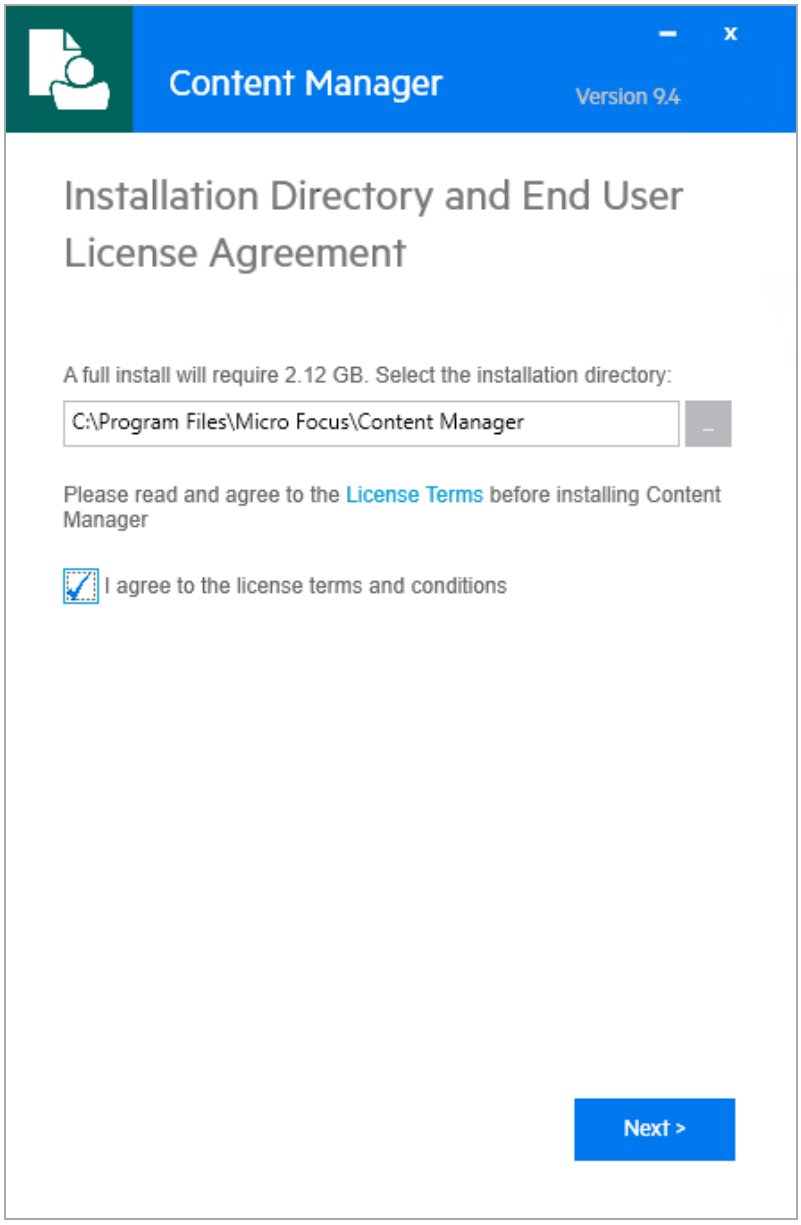
Install the WebDrawer

Before you attempt to install the WebDrawer, you'll need to make sure all the prerequisites are in place.

The Content Manager Specifications and Limitations document outlines most of them which is included in your release package.

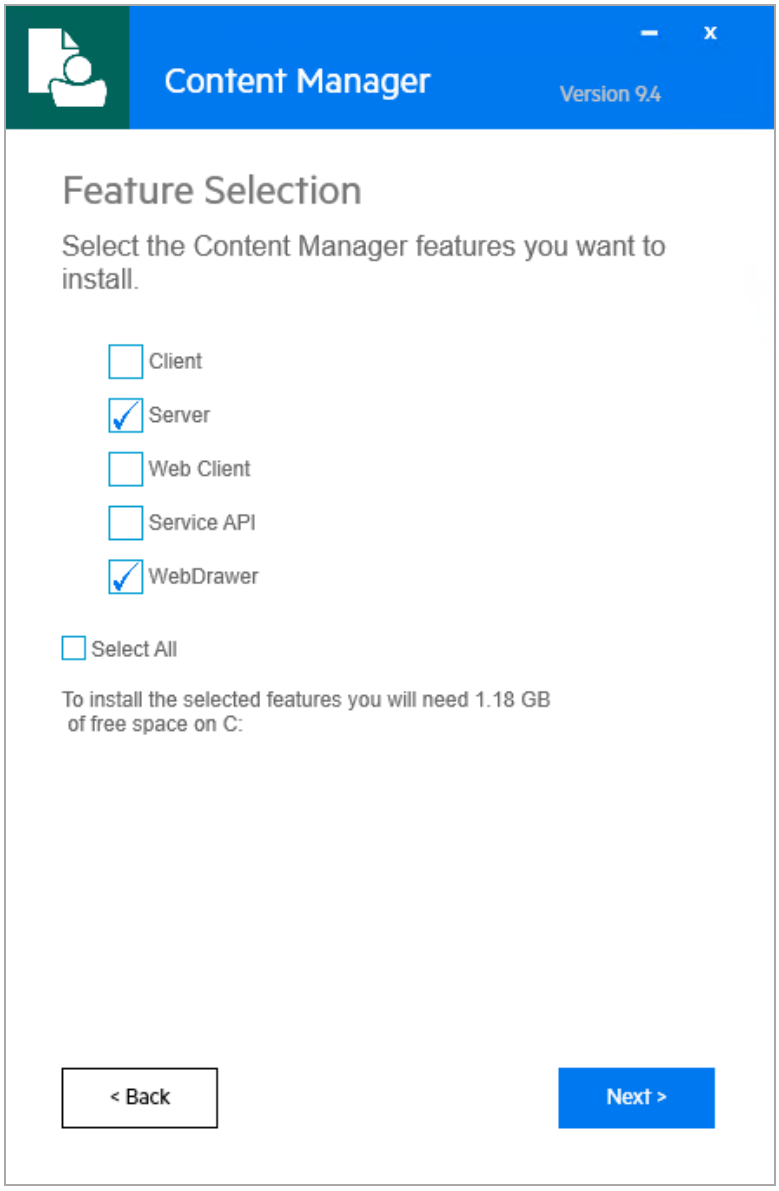
Using the Setup Wizard GUI

1. Run the 64-bit Setup package to launch a GUI wizard that guides you through the installation process.
2. Within the first screen, select the directory for the installation and agree to the license terms and conditions.



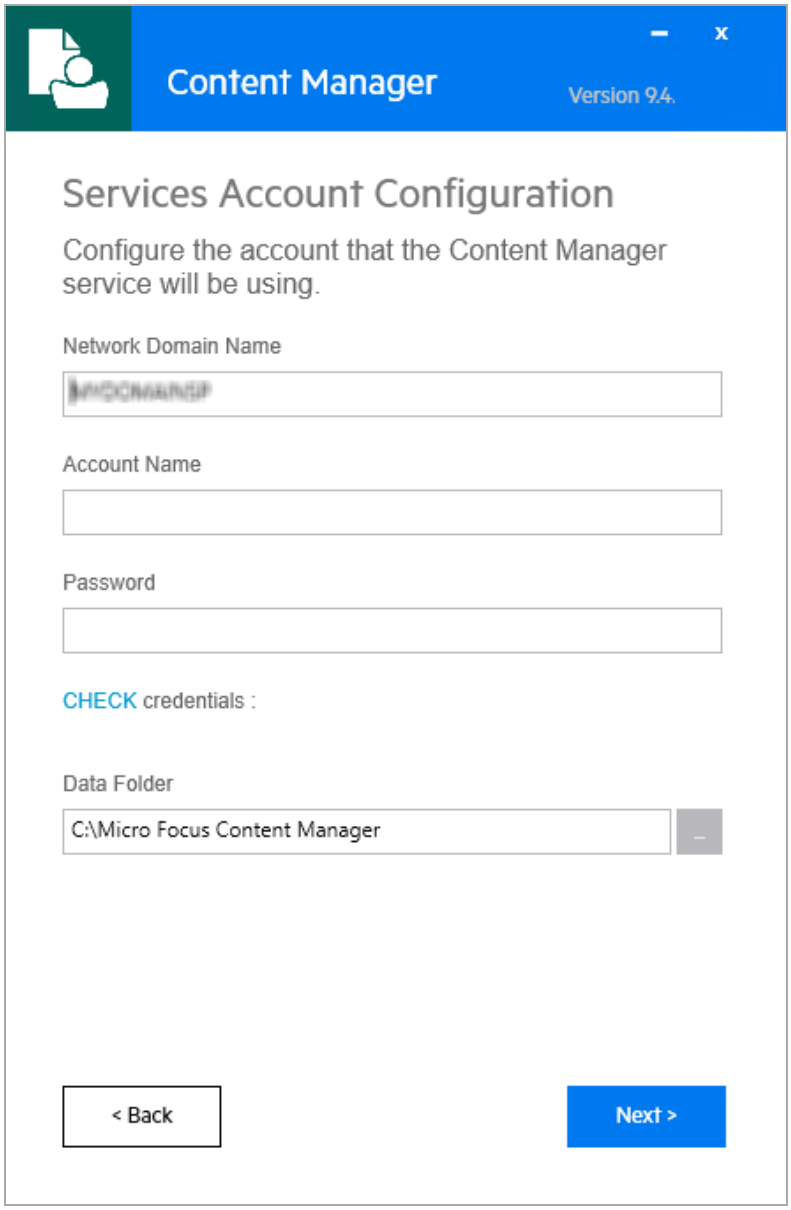
3. Select **Server** and **WebDrawer** from the feature list.

> **NOTE:** If the feature you've selected is highlighted in red text the Setup Wizard has determined you don't have the required prerequisites in place. For example, Web Client, Service API, and WebDrawer all require IIS to be installed.

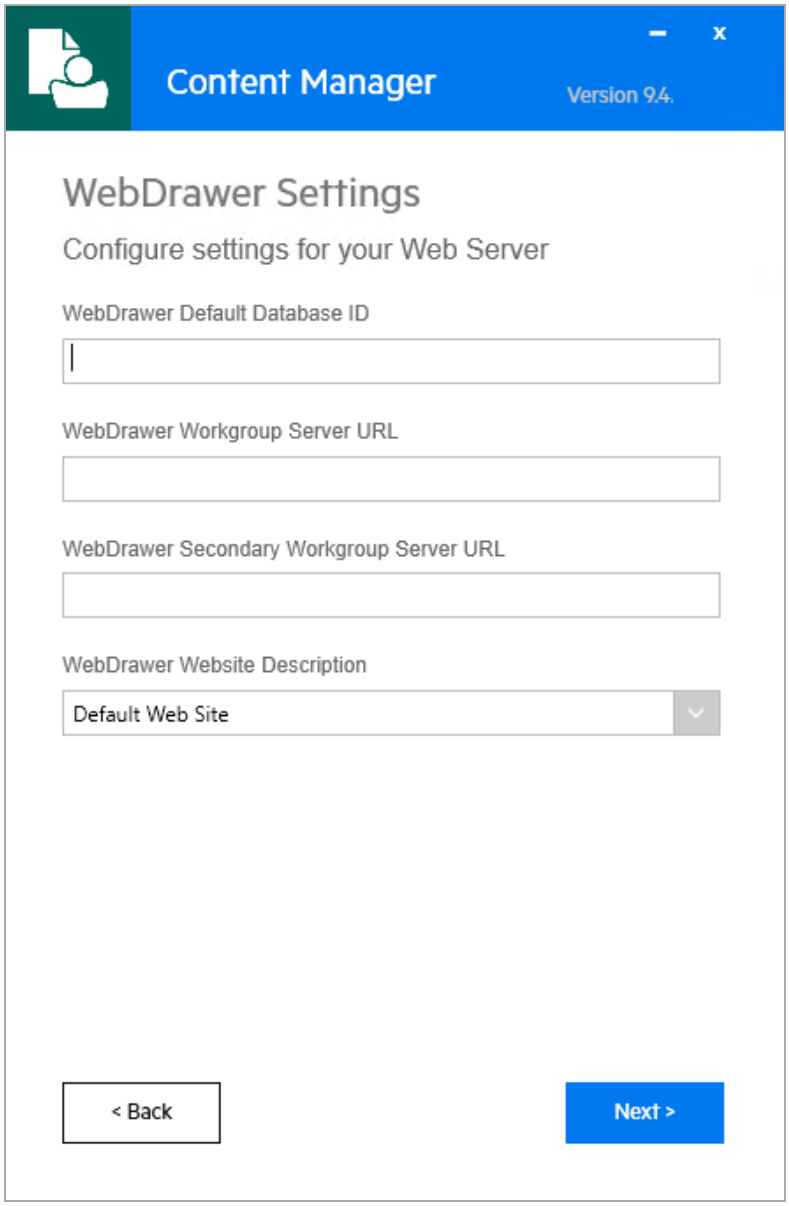


4. Enter the **Domain Name** and **User Account**. These credentials will be used to run the Workgroup Server service.

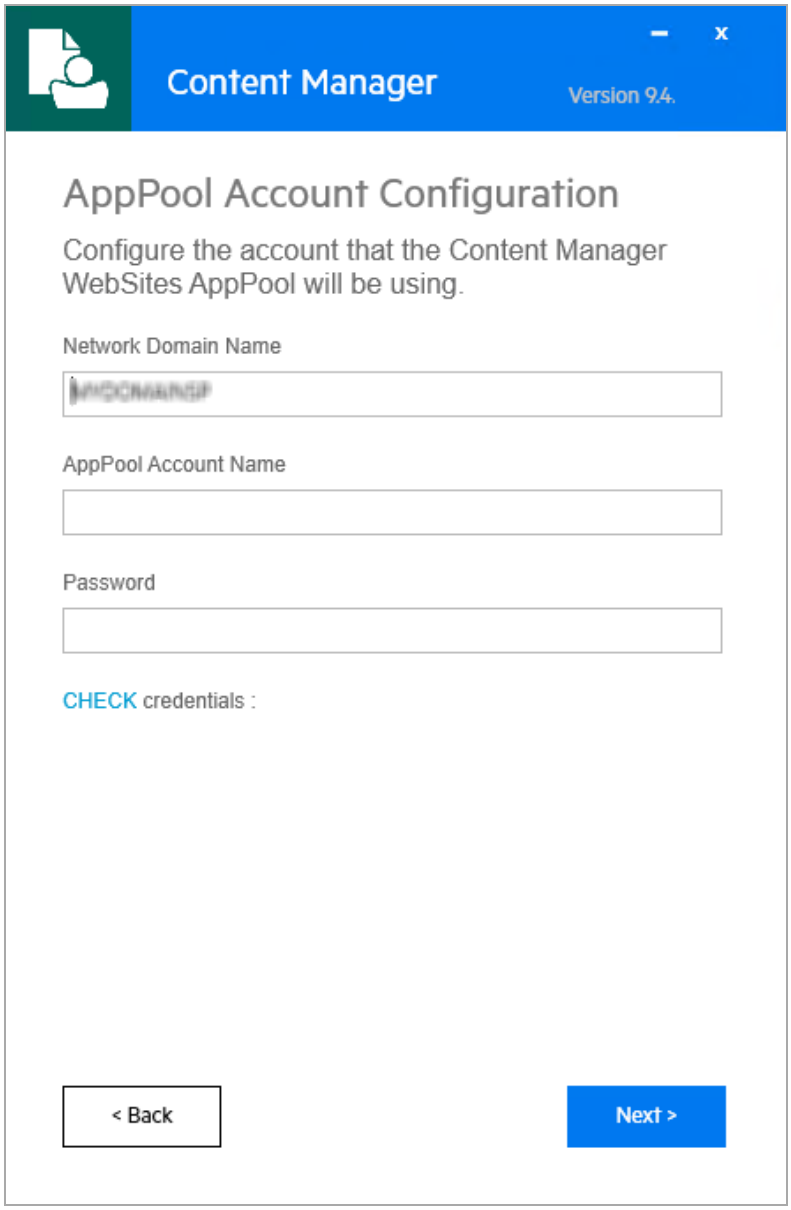
   You can check the credentials to ensure you've entered the correct username and password. At this point, you can also specify an alternative location for the data folder.



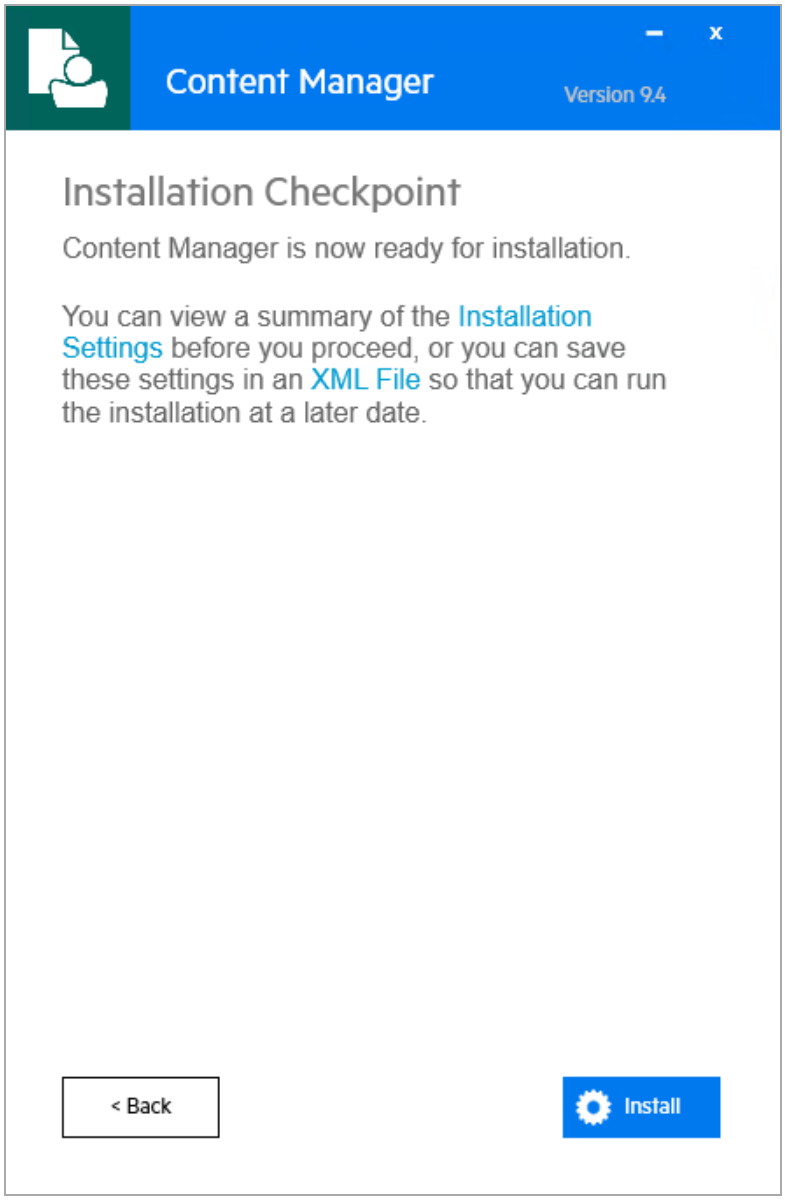
5. Enter the webdrawer settings:
   - **WebDrawer Default Database ID**
   - **WebDrawer Workgroup Server URL**
   - **WebDrawer Secondary Workgroup Server URL**
   - **WebDrawer Website Description**



6. Enter the AppPool configurations. You can check the credentials to ensure you've entered the correct username and password.



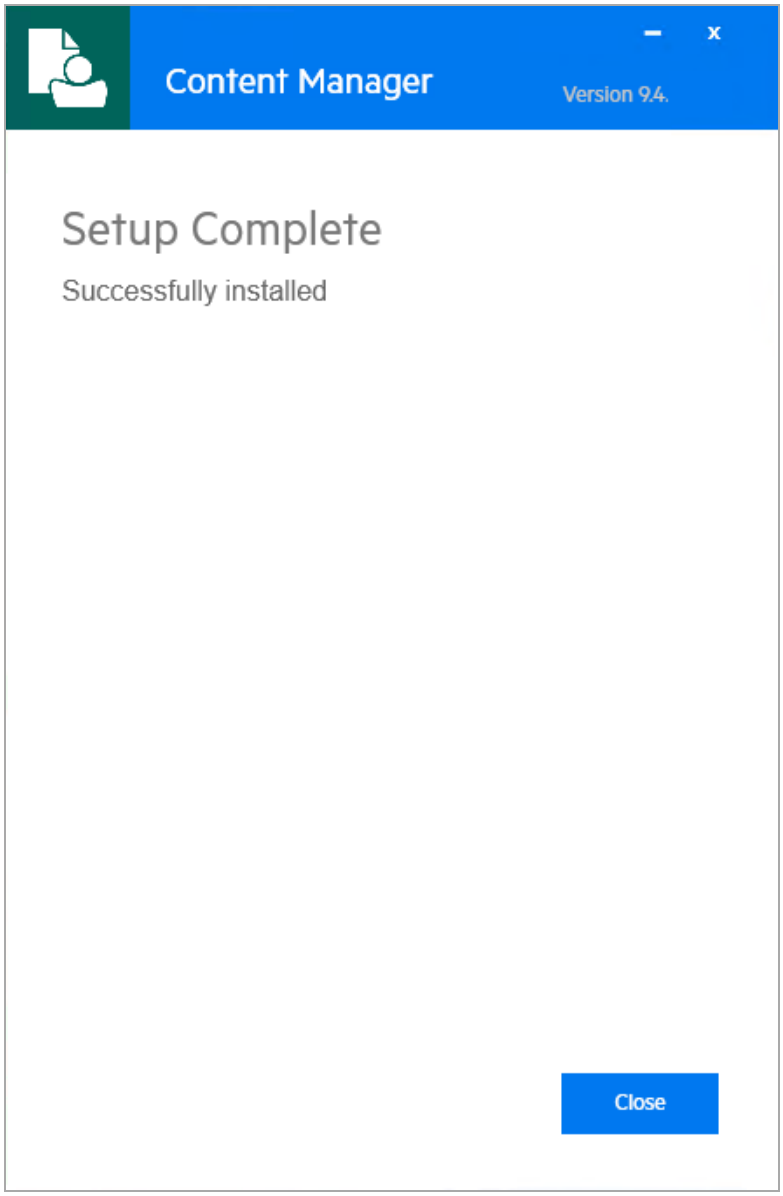
7. Click **Next** in the **Installation Checkpoint** page.



8. Click **Install** to begin the installation. Alternatively, you can review the Installation Settings and if needed, go back and make changes.

   Progress activity is displayed as the Setup Wizard works its way through the installation.

A message indicating setup status is displayed. Click **Close** to exit the setup wizard.



Click **Close** to exit the setup wizard.

Using the command line

Installing the WebDrawer using the command line uses the same approach as the Setup Wizard GUI. That is, you'll have to install a Workgroup Server and then the WebDrawer for it to complete successfully.

Firstly, run the Workgroup Server installation from the command line as an administrator:

```
start /wait msiexec.exe /i CM_Server_x64.msi /qn /l wgsinstall.log
```

When this is complete, run the WebDrawer installation:

```
start /wait msiexec.exe /i CM_WebDrawer_x64.msi /qn /l webclientinstall.log
```

The available command line arguments for the WebDrawer .msi installation are:

WD_WEBSITE_DESCRIPTION	WebDrawer default web site address
WD_DBID	default dataset ID for WebDrawer
WD_PORT	default WebDrawer port
WD_WG	default WebDrawer Workgroup Server
WD_WEBSITE_IDENTITY_DOMAIN	domain name
WD_WEBSITE_IDENTITY_NAME	WebDrawer app pool user name
WD_WEBSITE_IDENTITY_PASSWORD	WebDrawer app pool user password

Upgrading WebDrawer

NOTE:

- WebDrawer ISAPI is not supported in Records Manager 8.x or Content Manager.
- TRIM WebDrawer ISAPI customized templates do not work with Records Manager 8 .x or Content Manager WebDrawer. You will need to re-create your templates using Records Manager 8.x/Content Manager WebDrawer.
- After creating your templates for Records Manager 8.x/Content Manager WebDrawer, upgrading to a new version of WebDrawer overwrites and updates all default templates. Create custom templates in new folders which are not named **Root** or **Template**, and give the folders unique names.

IMPORTANT: When upgrading to Content Manager 9.3, due to the changes in installation paths, the configuration files from the previous version installation paths are not copied into the new C:\Micro Focus Content Manager workpaths. These files will be available in the original installation path and any modifications will need to be copied from these files into the newly installed configuration files installed to, by default, C:\Program Files\Micro Focus\Content Manager.

As a part of the Content Manager upgrade process the WebDrawer web configuration files, **hptrim.config** and **web.config**, which are installed as a part of the Content Manager installation process are copied to the WebDrawer work path folder, by default, C:\Micro Focus Content Manager\WebDrawerWorkpath.

These copied files have the date and time of the upgrade prepended to the file name for easy identification, for example, 04_25_2015_2_23_WebDrawer_web.config

After upgrading any additional configuration fields that were added to the WebDrawer configuration files can be copied out of these backup files and pasted into the new configuration files installed as a part of the upgrade.

User Guide

Database security in WebDrawer

Access to a Content Manager database through the WebDrawer Server is controlled by the same security systems as a standard Content Manager database. Users logged in to the Content Manager database through WebDrawer are subject to all the existing security filters, levels, caveats and group access controls.

Templates

The WebDrawer Server uses configurable templates to return data to your Web browser. Your WebDrawer administrator may have altered the Content Manager-supplied templates, which means they may not look the same as the images in this document.

Logging on to the Content Manager database through WebDrawer

Start your Web browser, type the WebDrawer Server address, press **ENTER**

Your WebDrawer administrator will supply the address of the WebDrawer Server.

Your Web browser connects to the WebDrawer search page.

You may be asked to enter your network user name and password to get access to the Content Manager database.

Searching Using WebDrawer

The HTML search pages provided with the WebDrawer Server provide two methods of searching a Content Manager database:

- quick search
- advanced search

Your WebDrawer administrator may have altered these templates to allow you to search in a different manner. If your interface differs significantly from that in this document, then check with your administrator for instructions on how to search the WebDrawer Server.

1. Select a search method from the **Search for** list.
2. Type the text to search for in the **Equal To** text box.

By default, the quick search method searches for records by their title words or Record Number.

> The Quick Search accepts any string search.

Quick search

Quick search returns records based on title words you choose.

1. Type the title word or words to search for in the **Quick Search** text box
2. Click **Search**

A list of records matching your words appears.

Location search

A Location search returns all Locations with that name.
A prefix search, e.g. **Smith** will find all people with that surname.

1. Type the Location to search for in the **Location Search** text box
2. Click Search

A list of Locations matching your search terms appears.

Advanced search

Advanced searches combine multiple search methods and search text by using the AND and OR operators in the power search section of the search screen.

1. In the **search for** list, click the drop-down button to select the search method.
   You may enter up to three search methods in the standard search template supplied with WebDrawer. If you need more than three criteria, you need to get the administrator to modify the search page.
   For each search method you select, type the text you wish to search for in the **equal to** text box. Some types of search allow you to search by ranges. Use a comma to designate a range of values. For example, searching by **Date Registered 7/22/04**, **8/22/04** returns all the records in the range including the dates specified.
2. Click **AND** if the results of the search must contain all of the search terms you choose
3. Click **OR** if you would like to display records which contain at least one of the search terms you choose
4. Click **Do Search**

A list of records matching your search terms appears.

Searching by date

When you search the Content Manager database for dates or date ranges, the WebDrawer Server recognizes dates that are consistent with the regional settings of the server that WebDrawer is installed on.
For instance, if the date format used by the WebDrawer Server is MM-dd-yy, a search using mm/dd/yy will return the correct items; however, a search for dd/mm/yy may not.
If you have doubts about the date format that your WebDrawer Server is using, ask your WebDrawer administrator.

Searching by range

Some types of search enable you to search by ranges. Use a comma (,) to designate a range of values. For example, searching for **7/22/03,8/22/03** returns all the records in the range including the dates specified.

Saving search criteria

After performing a successful search, you can save the search as a bookmark. When you reload this bookmark in your Web browser, the WebDrawer Server will perform the search and return the search results as if you had entered the search from the search page.

Browsing results

When WebDrawer displays the results of a search, you can use the links in the page for more information.

For example, a successful search may return multiple pages of records.

To check the next or previous page of records:

1. Use the page numbers at the bottom of the page

To view more information on a particular record:

1. Click the title of the record link

Working with records

Once you have found the record you were searching for, use WebDrawer to view, request or complete actions associated with it.

Viewing electronic documents

1. Open the Record and use the Links / Actions menu to download the document.

You can only view electronic documents in WebDrawer. WebDrawer does not update the Content Manager database or change the location of the file when you view it using WebDrawer. You cannot return edited documents to the Content Manager database through the WebDrawer interface.

To view the rendition using WebDrawer, update the **hptrim.config** by adding a new parameter in the **routeDefaults** attribute.

Open the **hptrim.config** file in a text editor, located in your installation folder, for example C:\Program Files\Micro Focus\Content Manager\WebDrawer. Locate the **routeDefaults** attribute and add the **RenditionDownload** parameter.

For example,

```
<routeDefaults omitBuiltInRoutes="true">
<clear />
<add name="RenditionDownload" model="RenditionDownload" />
</routeDefaults>
```

Requesting records

A record request is a request to change the physical location of a record. The relocation of the record is usually made to the person making the request, e.g. you might request a folder box stored in Operations to be transferred to you.

You can make record requests using WebDrawer. Your organization’s own internal procedures will determine how a record request is processed.

1. Display the record details of the record you wish to request
2. Use the Links / Actions menu to use **Make a Request**

> **NOTE:** Document requests through the WebDrawer Server use the date and time on the server when making the request.

Completing current Actions

If a Content Manager action tracking Action has been assigned to you, it is possible to register the completion of that action through the WebDrawer interface.

1. Display the details of the record with the Action assigned to you
2. Use the Links / Actions menu to use **Complete the Action**

Administrator's Guide

WebDrawer templates

Introduction

The WebDrawer Server uses templates to structure data from the Content Manager database objects in the user's browser. The templates supplied with the WebDrawer Server are written in ASP.NET Razor.

Operation

WebDrawer passes requests from the user to the Content Manager database using the Content Manager Service API.

The data from the Content Manager database is passed back to WebDrawer.

The templates work in conjunction with some standard Web pages and graphic objects which are normally located on the same Web Server. The example templates supplied with WebDrawer include some HTML files and graphics that are located in the **images** folder.

Templates in the Views folder

WebDrawer ships with a set of Razor templates, in the Views folder.

The following is a list of these templates.

List templates

The following templates cause a list to be rendered for each of the associated object types. Their main function is to map to the associated route (e.g. /Record or /Location) and reference the shared templates used to render the lists.

- **WDRecordList.cshtml**
- **WDSpaceList.cshtml**
- **WDRequestList.cshtml**
- **WDLocationList.cshtml**
- **WDJurisdictionList.cshtml**
- **WDClassificationList.cshtml**
- **WDKeywordList.cshtml**

Details templates

The following templates render the detailed property page for each related object type. Similarly to the List templates, their main function is to point to the shared template.

- **WDRecordDetails.cshtml**
- **WDSpaceDetails.cshtml**
- **WDRequestDetails.cshtml**
- **WDLocationDetails.cshtml**
- **WDJurisdictionDetails.cshtml**
- **WDClassificationDetails.cshtml**
- **WDKeywordDetails.cshtml**
- **WDHoldDetails.cshtml**
- **WDScheduleDetails.cshtml**

Other templates

The following other templates are required for WebDrawer.

- **WDCompleteActions.cshtml** – displays the response page when an action is completed.
- **WDEnumItemJS.cshtml** – renders Content Manager enum item values as a JavaScript object. Used by the search page to fetch captions for the search groups.
- **WDRecordPreview.cshtml** – displays a record along with the HTML rendition of its electronic document.
- **WDSearchClauseDefDetails.cshtml** – builds the search clause help page.
- **WDSearchClauseDefJS.cshtml** – Renders a JavaScript file containing all the Search Clauses. Allows the search clause SELECT fields to be populated and sorted.

Shared templates

Located in the Views\Shared folder the shared templates contain code shared across multiple other templates, the include:

- **Layout.cshtml** – the overall layout applied to each page in the site. Specifies common things such as the HTML head element, script and CSS tags etc.
- **childList.cshtml** – lays out lists of child objects within a details page. For example Record Renditions.
- **detailsView.cshtml** – lists the properties of an object (e.g. a Record) to display the detail property sheet.
- **ErrorLayout.cshtml** – similar to _Layout.cshtml except used by the error page.
- **inlineSearch.cshtml** – the details page included a search component allow a user to search for other objects using the currently selected object. This template defines that component.
- **propertyRow.cshtml** – used by detailsView,cshtml and WDCompleteActions.cshtml to render a property Caption and value.
- **recordBanner.cshtml** – despite its name used to display the title and ‘Links / Actions’ menu for all object types.

- **scriptLayout.cshtml** – used to give WDSearchClauseDefJS.cshtml a simple layout.
- **searchBanner.cshtml** – includes the 'SearchResults' banner in the list pages.
- **searchResults.cshtml** – renders the list of objects (e.g. Records) in a list, or search results page.

Editing existing templates

1. Before editing your templates, make sure you have a copy of the default templates. When you experience problems with your custom templates, go back to using the default templates.
2. Open the copy of the template with a Razor editor (e.g. Visual Studio or Microsoft WebMatrix.
3. Edit the Razor as you wish and save your changes to the file

Replacing images

Editing the graphics in the supplied templates, e.g. by changing background image and logos in the pages, is the easiest way of altering them to suit your organizational needs.

The image files are in the WebDrawer **images** folder.

1. Before you replace the default images, make sure you have a backup copy of them stored in a safe place so you can always revert back to using them
2. Change the name of your image file to be the same as the existing one you want to replace
3. Copy the files into the WebDrawer images folder.

The templates will not resize your images; so it is important to make sure your images are similar in size to the originals, or the templates may not appear correctly.

Advanced editing of templates

WebDrawer is an instance of the Service API with the JSON capability switched off. You can access more advanced help for customizing it by installing the Service API and reading the online documentation that comes with it. All the Razor techniques described in the Service API documentation are available in WebDrawer.

Viewing Electronic Documents

To maximize both the fidelity and performance of document viewing in WebDrawer uses three different viewing techniques for different file types:

- Text files are rendered as text, large text files are viewed in roughly page size chunks to reduce download time for large files.
- All other compatible file types are converted to file HTML.
- File types that are not suitable for viewing (such as EXE and ZIP file types) will display an error in the viewer.

Troubleshooting

Checklist

Check after each step whether WebDrawer is working correctly.

Move on to the next step only if it is not working correctly.

1. Check that the Web Drawer Application Pool Identity is either the CMServices account or a user that is listed in the Content Manager Trusted server accounts.
2. Check that the Web Drawer Application Pool Identity has **write** access to the folder **C:\Micro Focus Content Manager\WebDrawerWorkpath**
3. In the computer's **Services** list, make sure the service **Content Manager Workgroup Service** is listed and running.
   If it is not running and you cannot start it, verify that its logon account can run as a service and it is a member of the local computer's **Administrators** group.
4. In a DOS command window, type **iisreset** and press **Enter** to reset IIS.

WebDrawer ISAPI and Records Manager 8 WebDrawer

TRIM 7 WebDrawer ISAPI is not supported in Records Manager 8. Records Manager 8 WebDrawer is an entirely new application.

TRIM 7 WebDrawer ISAPI customized templates do not work with Records Manager 8 WebDrawer.

The recommended steps:

1. Take a note of all WebDrawer ISAPI configuration details.
2. In a controlled environment, install and configure Records Manager 8 WebDrawer according to your requirements.
3. Remove WebDrawer ISAPI 7.
4. Install new Records Manager 8 WebDrawer.

My browser cannot find the WebDrawer Server

- Ensure that you have the appropriate Internet software and TCP/IP protocols installed.
- Ensure the WebDrawer IIS Application is correctly configured.
- Ensure you have entered the correct address in the address bar of your browser.

My browser cannot view electronic documents

- Make sure the appropriate software application or plug-ins have been installed in your browser
- If your browser cannot view a downloaded document then your browser may prompt you to save the file to disk.
  Save the file and then use the appropriate viewer to view the file.
- For more information on saving and viewing documents through your Web browser, please consult your Web browser documentation.

Date searches

If your searches on dates fail or return incorrect records, check with your WebDrawer administrator to see what date format the WebDrawer Server is configured to use in the **Regional Settings** of **Control Panel**. The WebDrawer Server will generally understand dates in the correct order, i.e. **mm/dd/yy or dd/mm/yy** etc.

Search returns no result

If a user has not had a **Security Level** defined for them in Content Manager, then WebDrawer searches will return no results for that user's searches.

Time-based clean-up of previewed documents in Webdrawer is failing

The time-based clean-up of previewed documents in Webdrawer is failing with an error in the log. To clear the folder periodically without any issues, add the **uploadBasePath** parameter and set the value as path of the **WebDrawerWorkpath** folder in the **hptrim.config** file.

To add the parameter, perform the following:

1. Navigate to installation folder. For example, C:\Program Files\Micro Focus\Content Manager\WebDrawer.
2. Open the **hptrim.config** file in a text editor.
3. Add the **uploadBasePath** parameter and set the value as path of the **WebDrawerWorkpath** folder.

   For example,

   ```
   <hptrim poolSize="1000" uploadBasePath = "C:\Micro Focus Content
   Manager\WebDrawerWorkpath" preFetchFiles = "true" highResPDFThumbnails="false"
   indexPagePath="~/Search" autoPoolClean="true" serviceFeatures="Html,Razor,Json"
   xmlns="http://HP.HPTRIM.Service/WebDrawer"
   xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
   xsi:schemaLocation="http://HP.HPTRIM.Service/WebDrawer hptrimConfig.xsd">
   ```

4. Save the configuration file.

Viewing location properties fail with an error

After a location search, viewing the location properties fail with the following error:

```
Error retrieving data for property LocationSecurityString. You do not have
permission to view the property 'Security'.
```

To prevent this issue, add the property **ignorePropertyErrors** and set it to **true** in the **hptrim.config** file.

To add the parameter, perform the following:

1. Navigate to installation folder. For example, C:\Program Files\Micro Focus\Content Manager\WebDrawer.
2. Open the **hptrim.config** file in a text editor.
3. Add the **ignorePropertyErrors** parameter and set it to **true**.

   For example,

   ```
   <hptrim poolSize="1000" ignorePropertyErrors = "true" preFetchFiles = "true"
   highResPDFThumbnails="false" indexPagePath="~/Search" autoPoolClean="true"
   serviceFeatures="Html,Razor,Json" xmlns="http://HP.HPTRIM.Service/WebDrawer"
   xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
   xsi:schemaLocation="http://HP.HPTRIM.Service/WebDrawer hptrimConfig.xsd">
   ```

4. Save the configuration file.