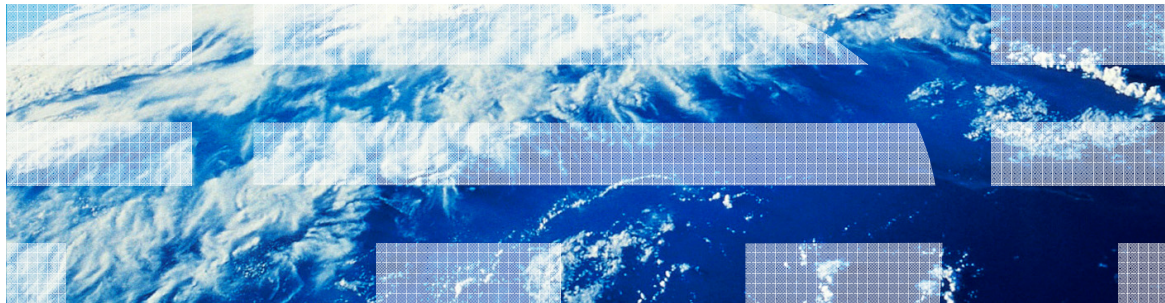




Configure IBM FileNet Workplace XT



Configure Workplace XT appearance

Site preferences help configure Workplace XT

- Workplace XT can be configured in a number of ways.
 - The *site preferences* method is used for a lot of configuration.
 - Site preference values determine default behavior of Workplace XT.
 - The most basic configuration is done by setting preference values on the *General* page.
 - Other Site Preference pages include Object Stores, Favorites, Tasks
- Only members of the Application Engine Administrators role can access the Site Preferences page.
- *General Settings* on the General page includes the following types of preferences:
 - Workplace XT application settings, including enabling or disabling the “drag and drop” document add feature
 - Author settings
 - Task-related settings
 - Add-on configuration settings

Site preferences for the user interface

- These preferences define the default display settings for all users.
 - Individual user preferences can override these site preferences.
- Locations
 - Tools > Administration > Site Preferences > General
 - Tools > Administration > Site Preferences > Object Stores
- General preferences include the following:
 - Default home page
 - Date and time format
 - Enable external drag and drop feature
- Object store specific settings include the following:
 - Property used for Document Name display
 - Columns displayed in list view pages
 - Details in System Properties pages

Configure author site preferences



- These preferences are used when adding folders and adding and checking in documents.
- Location
 - [Tools > Administration > Site Preferences > General > General Settings > Author](#)
- Can set default behavior to add or check in documents as a major version.
 - [Setting can be overridden on add or check-in wizard.](#)
- Can force folder selection during add or check-in.
 - [Requires users to file a document in a folder.](#)
- Can set Security page visibility during add or check-in.
 - [Hide the page to prevent users from changing default security.](#)

The bootstrap.properties file

- Stores the information specified on the Bootstrap page of Site Preferences.
 - Identifies object store where the site preferences are stored.
 - Identifies documentation path for help in Workplace XT.
 - Is updated when the bootstrap preferences are modified using the Site Preferences > Bootstrap page.
- Created and initialized during installation.
 - Default location at installation:
<Workplace XT_install_path>/FileNet/Config/WebClient/
- Resides in a shared location for web farms.
- Can be edited manually.

The Site Preferences file

- An XML file that controls some behavior, appearance, and connectivity within Workplace XT
 - Saved as a versionable, document object in an object store.
 - Stored in the object store specified on Bootstrap page.
 - Name of object is set in *Preference name* field on Bootstrap page.
 - Visible in Enterprise Manager at Root Folder > Preferences.
- Accessed each time a user signs in to Workplace XT.
 - In order to log in to Workplace XT, a user must have View access to the object store holding the Site Preferences file.
- Updated when a site preference is modified from a Site Preferences page.
- Change of name or location on Bootstrap page causes a new file to be created with default values.
- Each instance of Workplace XT has its own Site Preferences file.

Backup or move the Site Preferences file

- An administrator might need to do two things with the site preferences file.
 - Back up the preferences file as a precaution against data loss.
 - Move the site preferences file to a new object store.
- How to back up the site preferences document object:
 - Use Enterprise Manager to save the contents as a file on your file system.
 - All Tasks > Save Content To File
- How to move it to the desired object store:
 1. Create a site preference file in the new object store if necessary.
 2. Use Enterprise Manager to check out the site preferences document object in the new object store.
 3. Check in the saved content file as a new version of the site preferences document object.

Configure Workplace XT appearance

Customize Workplace XT general appearance

- You can customize the following parts of Workplace XT:
 - Banner and global menu
 - Logo, banner, and global menu images
 - Login page
 - Login banner and background images, background colors, and font colors
 - List view pages
 - Color of the column header and font
 - Colors used for highlighting
- To customize these items, do the following:
 1. Modify the settings in SkinGen.properties file at `<WPXT_install_path>/FileNet/WebClient/Skinning`
 2. Use SkinGen.sh or SkinGen.bat to generate new style sheets.
 3. Deploy the new style sheets.
 4. Restart Workplace XT.

Customize Workplace XT labels

- You can customize user interface labels and system property names for Workplace XT.
 - Edit *ConfigurableLabels.xml* file.
 - Located in `<WorkplaceXT_install_path>/FileNet/Config/WebClient/`
- Example for English used in United States:

```
<label key="ObjectStore"
  localizationKey="server.ConfigurableLabels_xml.ObjectStore">
  <resource>Object Store</resource>
  <resource locale="en_US">Library</resource>
```
- Can be customized for non-English locales.
 - Localized labels are included for Workplace XT for many languages.
 - Label to be displayed is determined by browser language setting.
- Example for German used in Germany:

```
...
<resource locale="de_DE">Bibliothek</resource>
```

Configure Workplace XT appearance

Change icons displayed in Workplace XT

- Document icons are predefined in Workplace XT.
 - The document MIME type determines which icon is displayed.
- Edit *icons.properties* file to add or change icon mappings.
 - Add or modify the MIME type-to-image mapping.
 - Example: `application/msword=images/mime/Doc`
 - This file is in `<Workplace XT_install_path>/FileNet/Config/WebClient/`.
- Put new icons in `<Workplace XT_deploy_path>/images/mime/`.
 - Add one icon for each new MIME type.
 - Icon must be created at 16x16 pixels size.
 - Icon must be named `Xxx16.gif`, where *Xxx* matches what is specified in the *icons.properties* file.

Reloading configuration files



- Settings in these and other configuration files can be reloaded from Workplace XT without having to restart the Workplace XT application:
 - [bootstrap.properties](#)
 - [icons.properties](#)
 - See Help for complete list.
- How to reload the configuration files:
 1. Sign in to Workplace XT as a user in the Application Engine Administrators role.
 2. Go to Tools > Administration > Site Preferences > Refresh.
 3. Click *Reload configuration files*.
- Site preferences changed through the Site Preferences pages do not need to be reloaded.

Access roles

- Function
 - Control user access to Workplace XT features.
- Membership
 - Members are selected from the users and groups defined in the directory service.
 - Multiple groups can be added into one access role.
 - Example: Clerks group and Managers group are both in the Accounting access role.
- Administering
 - Create and maintain using the Access Roles Site Preferences page.
- Location
 - Definitions are stored in the object store specified on the Bootstrap page.

Configure access roles



- Default access roles
 - These are administrative or process-related roles.
 - You cannot delete them.
 - You can add or delete members from them.
- Custom access roles
 - You can create access roles.
 - You can add or delete members from them.
- Configure access roles
 - Access roles can have either explicit allow or deny access.
- Access roles control access to these features:
 - Primary views
 - Advanced tools
 - Actions
 - Downloads
 - Multi-select actions

Application Engine Administrators role



- Most important default access role
 - This role must have at least one member.
 - It determines which users can set the Site Preferences.
 - Only members of this access role can define access roles and membership.
 - Members of this access role are implicitly members of all defined access roles.
- Denying users access to this role
 - No explicit *deny access* to this role exists for security principals.
 - Users and groups are implicitly denied access unless they are specifically added as members to this role.

Resolving access role control



- The default access setting is to allow access.
 - You must change access to *deny access* if needed.
- *Allow access* in one role overrides *deny access* in another role.
 - Example: Clara has access to the Search page even though she is a member of the Clerks role (which does not have access to this page) because she is also a member of the Search role (which does have access).
- #AUTHENTICATED-USERS in an access role grants membership in the role to all users.
- Object store administrators have View access to all objects in the object store.
 - Regardless of access role membership

Access roles and primary views

- Primary views
 - [My Workplace](#), [Browse](#), [Search](#), and [Tasks](#) pages
 - [Advanced Tools](#) and [Downloads](#) options from Tools menu
- Access primary views from the toolbar and the Tools menu in Workplace XT.



- You can apply access roles to primary views.
 - [Determines which users and groups can access the primary view](#)
 - [Set in Site Preferences > Primary Views](#)

Control access to Workplace XT actions



- Actions on Content Engine objects include the following:
 - Check in, check out, file, unfile, delete, download
- Workplace XT actions are available from the following locations:
 - Tools menu
 - Actions menu
 - Pop-up menus
 - Properties information pages
- Use Site Preferences > Actions to control access to actions.
 - You can assign multiple access roles to each action.
 - Only members of the allowed access roles can access the action.
 - Most actions have default access set to *Everyone*.
- Use MenuActions.xml and Actions.xml files for finer control.
 - For example, you can hide actions for all users or for certain classes.

Configure Workplace XT behavior

Modify MenuActions.xml and Actions.xml files

- MenuActions.xml file
 - Defines actions displayed in List View context menus in Browse and Search mode.
 - Defines actions displayed on the Workplace XT Actions menu.
 - Can be configured to control actions by object class, MIME type, version status, and so on.
- Actions.xml file
 - Controls the *More Information* JSP pages and the *My Workplace* context menus.
- After changing either file, reload the configuration files from Site Preferences.
 - No need to restart the web application.

Change which image types use the Image Viewer

- The Image Viewer is provided with Workplace XT to open many types of image files.
 - Enables working with IBM FileNet P8 native annotations
- By default, all image types supported by the Image Viewer are listed in this XML file.
 - `<WorkplaceXT_install_path>/FileNet/Config/WebClient/content_redir.properties`
- To prevent an image from being opened using the Image Viewer, remove image types from the file.
 - Example entries:
 - `image/jpg=/WcmJavaViewer.jsp?{JSP_QUERY_STRING}`
 - `image/bmp=/WcmJavaViewer.jsp?{JSP_QUERY_STRING}`
 - `image/tiff=/WcmJavaViewer.jsp?{JSP_QUERY_STRING}`
 - `image/gif=/WcmJavaViewer.jsp?{JSP_QUERY_STRING}`
- Restart the Workplace XT application on the web server after editing the file.

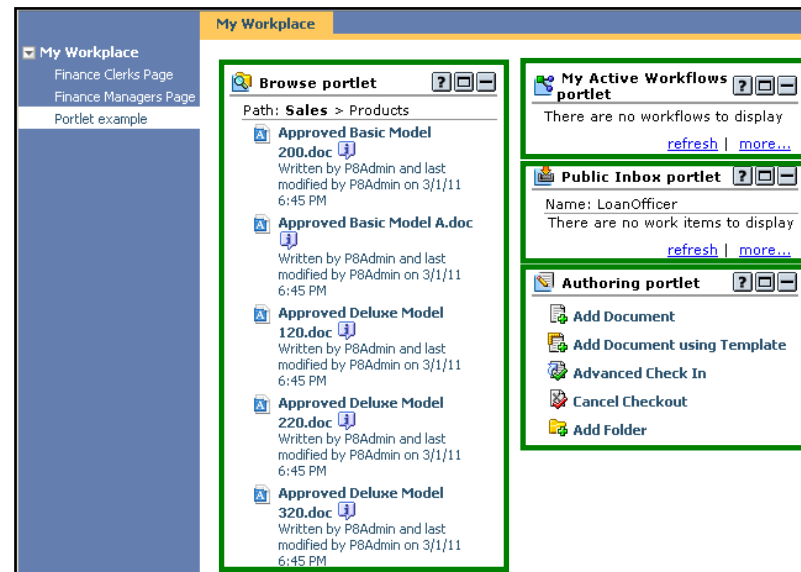
My Workplace pages



- Provide a way for users to access multiple Workplace XT views from a single page.
- Group pages
 - Administrator configures and maintains these My Workplace pages in Site Preferences.
 - Administrator determines which user groups can access these pages.
- Personal pages
 - User creates and maintains them in User Preferences.
 - Only the user who created the page can access or modify a personal page.
- My Workplace page definitions are stored in the corresponding site preferences or user preferences file.
 - Group pages are stored in the site preferences file.
 - Personal pages are stored in the user preferences file.

Workplace XT portlets

- A portlet is a web component designed to be used as part of a composite web page.
- Portlets can provide several Workplace XT functions on one page.



This page contains four portlets.

Each portlet is identified here by a green box.

Create a group My Workplace page

- Location
 - [Tools > Administration > Site Preferences > My Workplace > Pages](#)
- Only Application Engine Administrator access role members can add, modify, and delete group pages.
- To build group pages, configure the page layout first.
 - [Click Add New > Design Page wizard > Design Page.](#)
 - [Specify the column widths.](#)
 - [Select the portlets for the page.](#)
 - [Arrange the portlets within the columns.](#)
- Specify which access roles can see the page.
- Save the page, and then configure each portlet.

Configure a portlet on a My Workplace page

- The same portlet on two different pages is configured separately.
 - Example: Show up to 10 items in a Browse portlet on one page, and 4 items in another Browse portlet on a second page.
- On one page, each portlet is configured separately.
 - You can adjust the portlet display properties in many ways.
 - Examples: Set Browse to start at any subfolder, set Public Inbox to any queue, and set Search to any search template.
- Some portlets must be configured before they are visible on the page.
 - Example: You must select a public work queue for the Public Inbox portal before items can be displayed.

Configure My Workplace pages

Configure Browse and Search portlets



- Configure the Browse portlet to display the following:
 - Items from a specific object store and folder
 - Items from a stored search
 - A list of stored searches from a specific folder
- Configure the Quick Search portlet to display the following:
 - The Quick Search entry field
 - One selected search template

Configure My Workplace pages

Configure External URL and Authoring portlets



- Configure the External URL portlet.
 - Enter the URL of the external web site to be displayed.
- Configure the Authoring portlet.
 - Select the authoring tools that your users need most often.
 - Access roles can limit which tools end users can access.