HRE –AUXILIARY (NON-DATABASE) FILE OVERVIEW

Revision history

2018-06-01	Robin Lamacraft	Original draft
2018-06-25	Don Ferguson	Revised throughout and added detail of how/when files created, and their content.
2018-10-16	Nils Tolleshaug	User authentication for remote server access
2019-03-07	Don Ferguson	Minor edits to tighten language/definitions
2019-04-23	Don Ferguson	Minor revisions and alignment with document *03.32.01*

SCOPE

HRE is an application that may be considered to be in 2 parts; an HRE Client process and an HRE Server process. The GUI is controlled by the HRE Client process and makes requests to the HRE Server process(es). The Server's processes' main functions are to update HRE Project databases.

In the simplest model the HRE Client and Server processes are being executed in the same computer (the 'local' case). In the other case the Server processes are executing on another computer that may be in the same location or be accessed by internet communications (the 'remote' case). When the Client and Server processes are executing in the same computer HRE is a single-user at a time configuration. When the Server and Client are not running in the same computer then more than one user can operate on a HRE project at the same time.

A Client process may access several HRE Projects that are served by different physical computers (local or remote). To be able to access a number of different Servers the Client process needs to maintain information about which Project is served by a particular Server and the communication path to the Server.
Likewise, a Server needs to maintain information on which Clients can access a project and whether they are currently doing so.

To provide the required functionality for the above scenarios, the HRE system requires the use of auxiliary (non-database) files.

AUXILIARY (NON-DATABASE) FILES

There are 2 types of auxiliary (AUX) files – one aligned to each HRE User and one aligned to each Project database. Each holds specific information, also divided into 2 groups. Their layouts may be described at a high-level as follows:

User AUX File
User related information, such as: • User preferences • Accessibility data (vision, motor action, etc) • Default Viewpoints • other data as may be required.
Project related information (per Project): • Project name, database filename, location • " • other data as may be required.

Project AUX File
Project related information, such as: • Project name, location • Associated data folders (external, e.g., for image files, etc • other data as may be required.
User related information, such as: • Username, email address, language, last access • " • other data as may be required.

Basic Concepts and Rules

1. The AUX files need to be stored at a known file path in the appropriate computer
2. To maintain flexibility in possible content the files will be in XML format
3. Every installation of HRE, regardless of where databases will eventually reside, MUST have 1 local database (the 'seed' database)
4. All Users who have opened an HRE database will always have a local User AUX file with a list of projects successfully connected to
5. As per rule 3, remote Servers must also have had an HRE installation and a 'seed' database installed. This is essential, as the only way to create a project database with its corresponding AUX Database file is to run HRE on that server.

CREATION OF AUX FILES

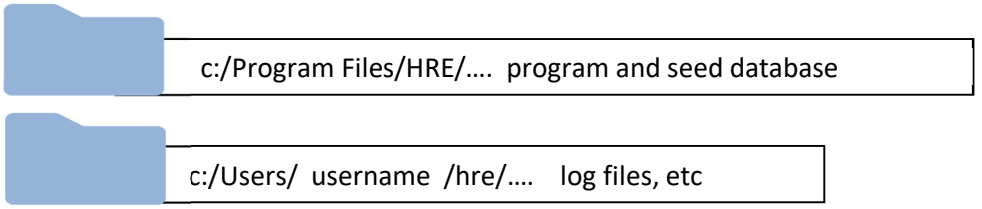
This section describes an initial HRE install and identifies the various steps that must take place to ensure the creation and population of the required data in the AUX files through the use of the HRE ProjectNew, ProjectOpen and ProjectAdmin routines.

First Installation of HRE

Assume we start with the first install of HRE on a computer (we will use the Windows environment for this explanation, but equivalent processes must take place for Linux and Mac machines).

The program is installed into C:/Program Files/HRE/……
A 'seed' database is also installed with the program (over time there may be multiple types of seed databases made available to users). This seed database has basic preloaded data that ensures the integrity of the database indexes, etc.

HRE INSTALLATION FILES



First Use of HRE

There are 3 possibilities:

- User wishes to create a new Project on this computer (so User chooses Project New)
- User wishes to connect to a pre-existing remote project created by the administrator of a remote Server, who has supplied appropriate login/connection information (so User chooses Project Open)
- There is a local project database (created by a previous user of HRE on this or another computer) (so User chooses Project Open).

First use of GUI_ProjectNew

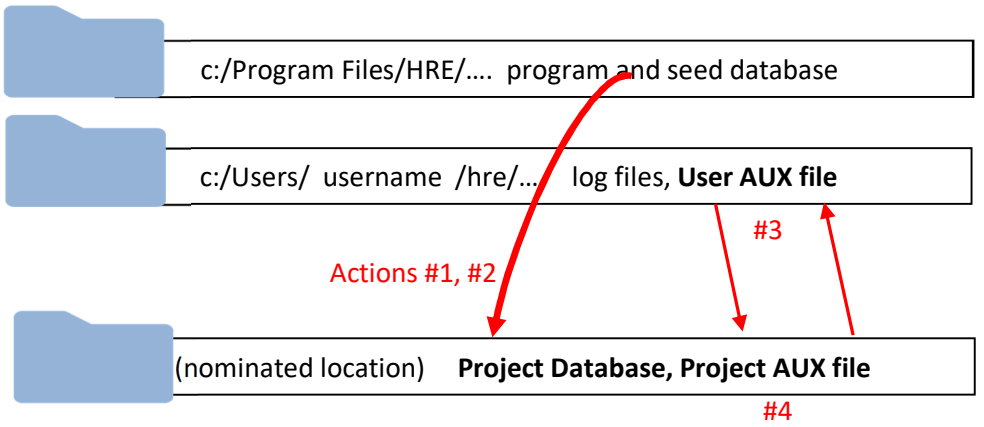
This routine creates a new HRE database (and project) from the 'seed' database supplied during installation and creates the required AUX files.

NB: if the user wished to create a new project using his or her own starting data (pre-defined sources, repositories, events, roles, and so on), they would use ProjectCopyAs applied to their own starter database, thus creating a new project/database.

The user first needs to select the folder in which the new database/project is to reside (which may be an internal or external local device or mapped NAS server).
When the location is chosen, ProjectNew then:

1. copies the seed database to the chosen location with the requested filename
2. initialises the Project within the database with the requested project name (which may be different from the database filename)
3. creates the User AUX file in C:/Users/username/hre/…. and populates it with the project database info (database filename, project name, location, etc) and all other required data
4. creates the Project AUX file in the same location as the new database file, and populates it with the Username, email, language data (also supplied by the User)
5. opens the Project and checks the User table for the presence of any Users. If and only if there are none, then add this User to the project with full administrative rights.

HRE FILES AFTER FIRST USE OF PROJECTNEW



NB: this representation is the same for both a local database/project and the setup of a project on a remote server by the server Admin, as the database/project is 'local' to the Admin..

NB: a User may not attempt to create a new project on a remote (IP addressed) server – this must be executed on the server itself by an administrator using the local HRE installation. Once created, the administrator can then advise the User how to access the database and the remote User would use Project Open with the information supplied by the project administrator.

Use of ProjectOpen

There are three possible scenarios:

1. Any Project; has been opened by this User: we are opening a project already known to this User, based on data in the User AUX files. If there is only 1 project in the User AUX file, the project should be automatically opened without requesting further input.
   Otherwise, the User is presented with a list of all Projects from the User's AUX file and can then choose the one to open. Selecting a project should immediately open that project, whether local or remote (subject, for remote projects to the required server login process)
2. Local Project; not used by this User: this covers the situation of there being a Project on this computer originally created by some other user of the same computer, OR the importation of a project from some other system, OR the possible case of the User AUX file having been deleted (and needing to be re-created).

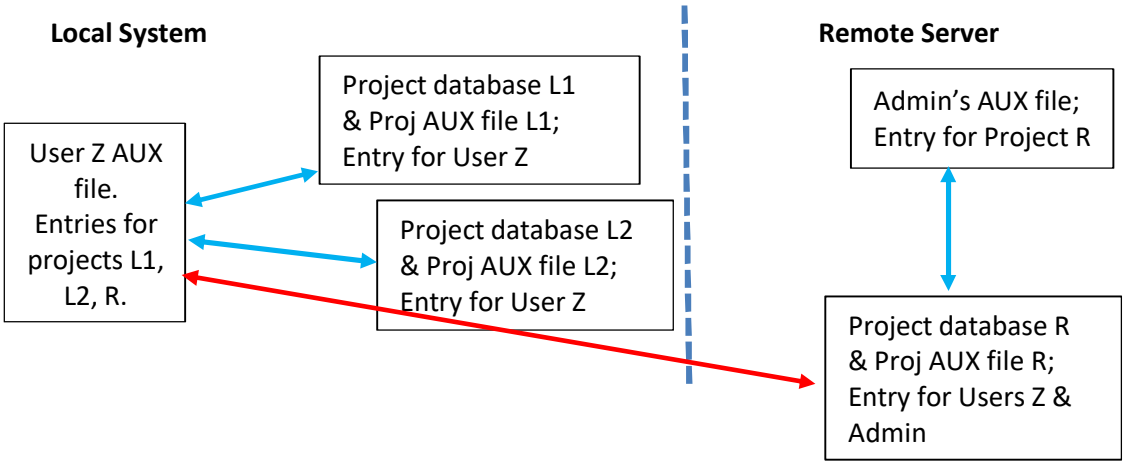
The User may browse (using the OS file explorer) to find such a local project, previously not used by this User, but resident on this computer. If a local project is found and selected, ProjectOpen creates the User's AUX file (if one does not exist), adds the project to the User AUX file, and adds this User to the Project AUX file. However, as this User will NOT be in the project's User tables, the User must be added into the project with full administrative rights, regardless of the User rights already present – this is 'safe' in this case only, as this is a local project.
The User should also be requested to use ProjectAdmin to edit the project User tables to remove any other registered users

3. Remote Project, not used by this User: if this is a first-time use of this remote project the User must have been told how to access the remote server, the database and project names and the Username the remote Server administrator has setup for him to use, and this Username and rights must have been added into the project User tables already by the administrator.
If the User has connected to this remote project from a different computer, the connection details will need to be added to this User's AUX file, from when access will then work, as his details will already be stored in the Project AUX file and project User tables.
In either case, if connection is successful, then open the project.

Accordingly, the ProjectOpen module has to adapt to each of these modes. Connection to local projects requires no login capability but accessing remote shared projects does require user authentication. To achieve this, the ServerLogin module as described in *09.01 CC_RemoteServerConnection* has to provide user authentication and the business rules including appropriate warning and error messages to control these aspects.

Finally, on Open, the routine should populate the User's AUX file with default settings for a new project, then overlay these with the User's personal settings from this User's last use of this project (if there was one).

AUX FILE CONNECTIONS WITH MULTIPLE LOCAL AND ONE REMOTE PROJECT
(Local connections shown in blue, Remote connection in red)



On Subsequent HRE Startup

As HRE has been used before, there is now project history (i.e., there has been at least one previous Project Open and Project data exists in the User AUX file). It is thus possible to use Project Open to select the project the User wishes to open (as above in option 1).