



Guide

Profile management

[PRF]

TERMS AND CONDITIONS

Documentation

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Conventions followed in this manual



Information

Additional Information about the current topic



Caution

Special warning on a particular point of usage which could lead to a serious malfunction.



In case of difficulty...

Technical solution to a problem.



Reference

Reference to another EverSuite guide.



See

Link to an another paragraph

1 INTRODUCTION

The idea of profiles was introduced into EverSuite applications in order to establish relationships between a document, its origins and its storage. Profiles simplify management of the whole document lifecycle, which is particularly important in solutions incorporating ES-HDS, ES-MMS and ES-Compliance.

ES-PRF enables you to:

- define a **data taxonomy** based on their origin, retention period, and their use in one or more EverSuite services.
- configure data lifecycles globally in EverSuite, with traceability related to each action or event in the application's services.
- manage **different data sets** in the same table.

1.1 WHAT IS A PROFILE?

A **profile** is a set of data in a table for whose records a life cycle has been defined. This table is often referred to as a SQL table or data table throughout this guide.

It is possible to associate with this dataset Workflow processes (creation, modification, deletion or archiving), a lifespan (notion of purge) and an "end of life" destination profile.

1.2 PROFILE RULES

- A data table record is **associated with one and only one profile**.
- A data table may be governed by several profiles.
- A profile is for one data table only.

1.3 LINKS

Links between profiles and data are recorded in intermediate tables, link tables, with a name based on the profile code, in the form **PRF<code_profile>**.

For example: PRFPublic (where "Public" is the profile code).

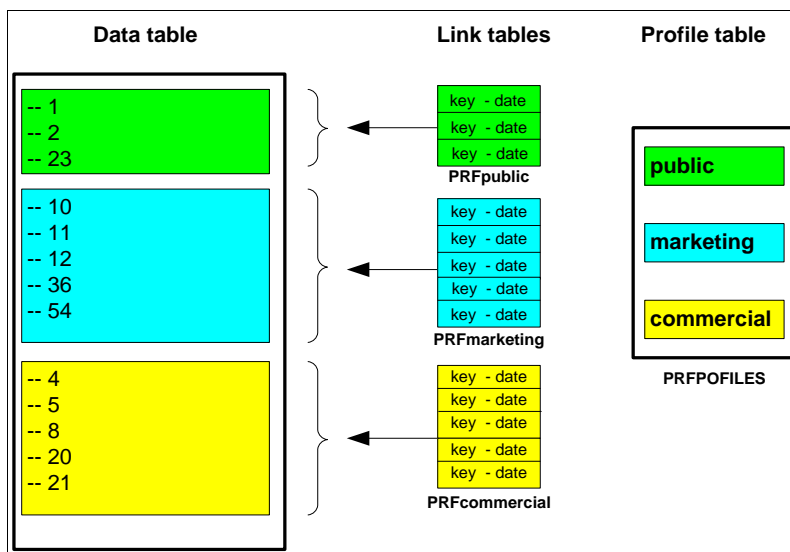


Figure 1: Links between profiles and data

These **links** may also be recorded specifically for a service, in link tables specific to that service. They are then handled by each service. The link table is then named **PRF<service><code_profile>**, for example PRFMMSPublic.

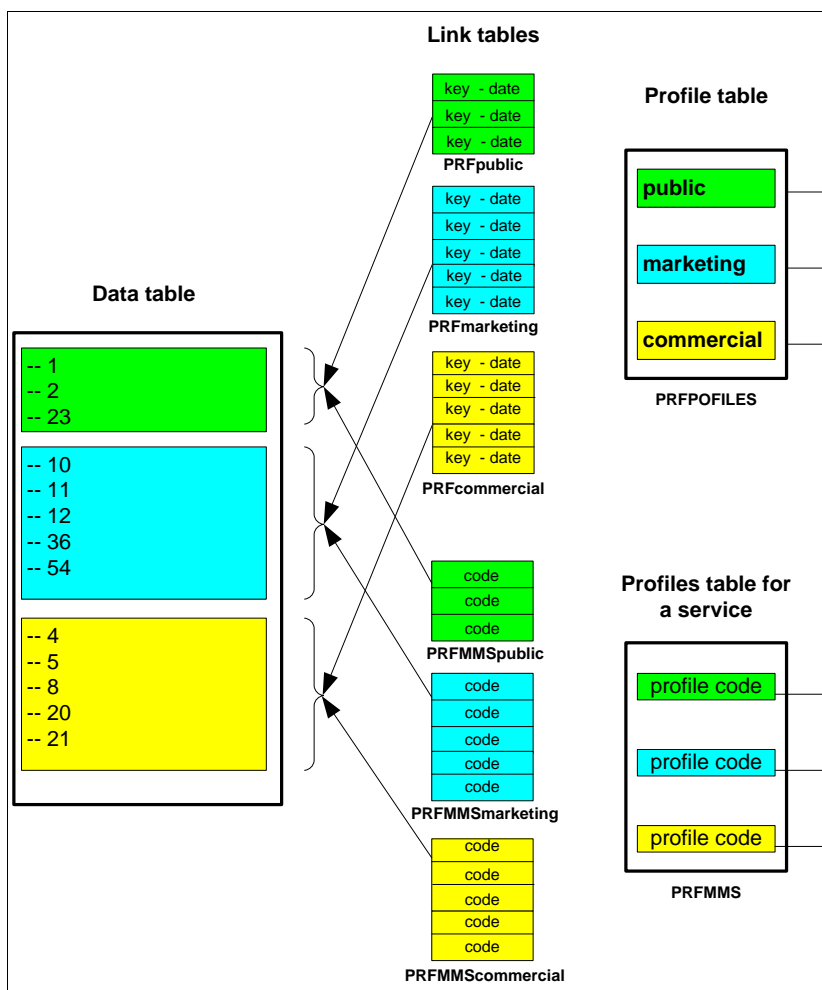


Figure 2: Specific links between profiles and data

The **lifespan of a record** in a SQL data table is managed in the profile. On the other hand, its **availability** in a service is handled by that service.

1.4 WHAT IS A PURGE?

The deletion or **purge** of a record depends on a condition declared in the profile - a time limit or a SQL condition. When the condition is met, the record is then marked as a **candidate for deletion**.

This deletion is done automatically via an order issued by the **ScheduleManager**, an ES-CORE module, or directly by the administrator with an URL.

If profiles are being managed by a service, the purge declared for this service affects only the availability of the record for consultation in this service, without it becoming a candidate for deletion in EverSuite.

2 OVERVIEW

2.1 MENUS

To access ES-PRF profile management features, click on the **Services > ES-PRF** menu.

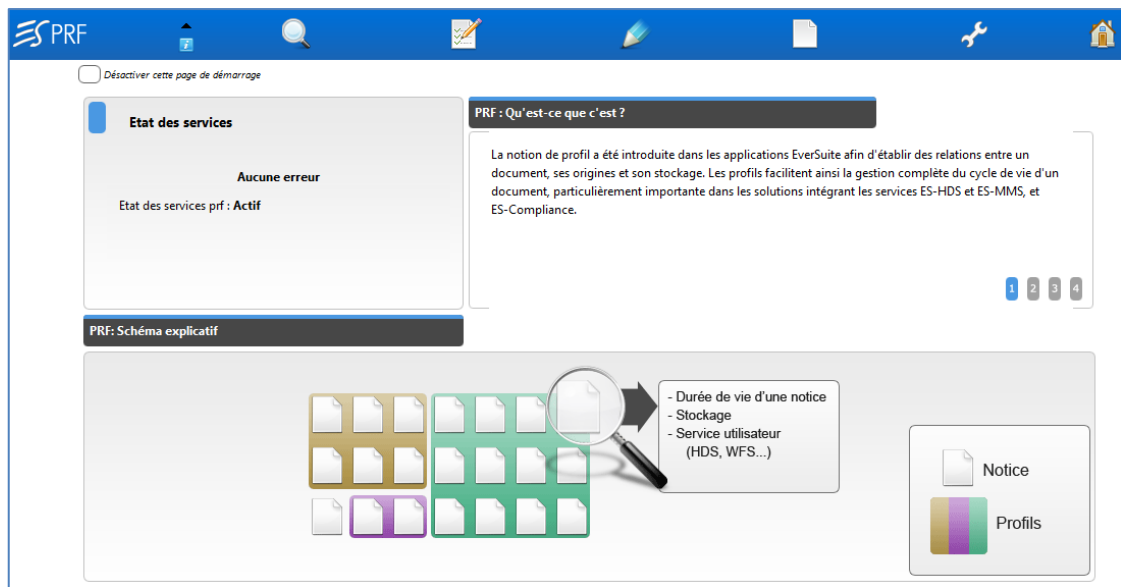


Figure 3: ES-PRF home page

The main features are accessible from the toolbar menus:



Search



Relational profiles



Insert



Consult



Configuration: access to profile configuration and administration menus:

- Configuration
 - Initialize profiles
 - Initialize automatically
 - Add records to profiles
 - Parameters

- Profile table migration
- Administration
 - Profiles
 - Profiles for service
 - Profile rules
 - Transfer records
 - Relational
 - Mirror
 - Security

Apart from the **Configuration** menu (whose options have their own chapters), the other menus (**Search**, **Relational profiles**, **Insert**, **Consult**) are discussed below.

2.2 SEARCH BY PROFILE AND VIEW

Searching a table using profiles lets you access the data more rapidly. They act as filters. Searching is based on EverSuite **views** on the table, which determine how the results table is displayed ("min" fields) and records are viewed.

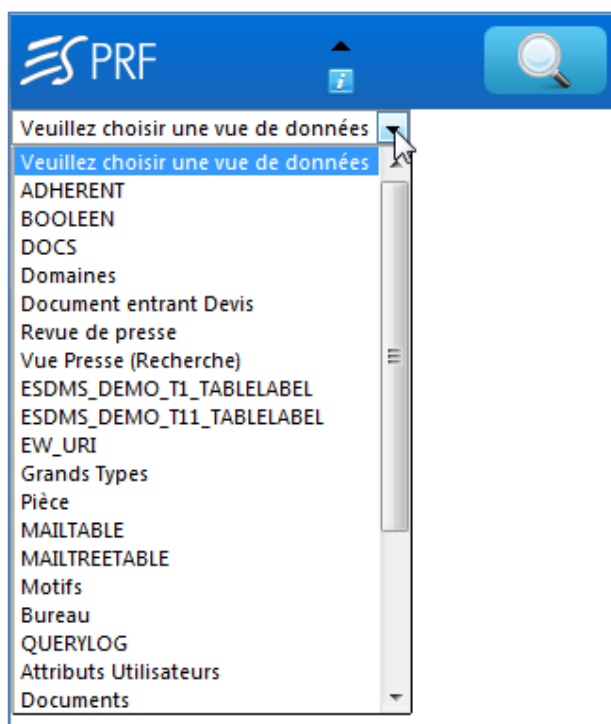


Figure 4 : Search by view and by profile




2.3 RELATIONAL PROFILES

Tools for input, viewing and profile searching by profile or by profile linked to a service are offered:



| Code du profil | Base de données | Description | Actions |
|----------------|-----------------|------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Profils | | | |
| EDEVIS | dPortal | Document entrant Devis |    |
| SDEVIS | dPortal | Document sortant Devis |    |
| SAEDOC | dPortal | Documents |    |
| SAEVEROBJ | dPortal | Eléments de Versements |    |
| AUTO757 | dPortal | Coupure de presse |    |
| SAEVERSE | dPortal | Versements |    |
| HDS | | | |
| FLD | | | |
| ESNET | | | |
| MMS | | | |
| SAE | | | |
| CFS | | | |

Figure 5: Relational profiles

-  Add a record associated with the profile
-  List the records associated with the profile
-  Search the records associated with the profile.

2.4 INSERT

The record is associated directly with a profile, depending on the view selected.

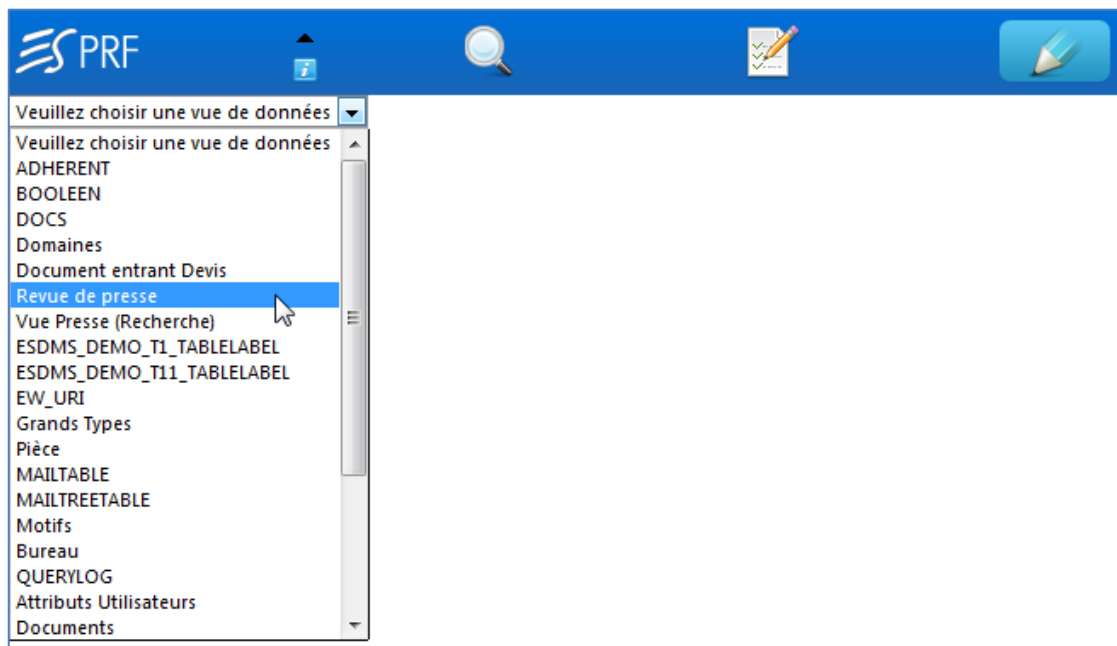


Figure 6: Entering a record associated with a profile

2.5 CONSULT

How all the records linked to a profile are displayed depends on the view queried (main table or a particular EverSuite view).

Example:

Administration > Data source > Relational ⇒ on the main table: TFOLD_DO (Purchase order)

| N° | Date | Type de document | Code affaire | Client | Projet | Auteur |
|----|----------|------------------|--------------|---------|--------|-----------|
| 1 | 20050701 | Bon de livraison | 2165-2 | VIVALDI | | EVER TEAM |
| 2 | 20050503 | Bon de livraison | 2389-4 | FLOW | | EVER TEAM |
| 3 | 20052704 | Bon de livraison | 5421-4 | DUS | | EVER TEAM |
| 4 | 20051005 | Bon de livraison | 5496-2 | LORCA | | EVER TEAM |
| 5 | 20052706 | Bon de livraison | 8798-6 | KAYA | | EVER TEAM |

Figure 7: Viewing records linked to a profile

| 1 - Commun | | 2 - Caractéristiques | | *. Informations Systèmes | |
|--------------------|------------------|----------------------|--|--------------------------|--|
| Date : | 20051005 | | | | |
| Type de document : | Bon de livraison | | | | |
| Code affaire : | 5496-2 | | | | |
| Client : | LORCA | | | | |
| Auteur : | EVER TEAM | | | | |

Figure 8: Displaying a record using the main table definition

If these data are listed using a view not linked to the profile:

Administration > Data source > Relational ⇒ on the view: PO (reduced)

| N° | Date | Client | Code affaire |
|----|----------|---------|--------------|
| 1 | 20050701 | VIVALDI | 2165-2 |
| 2 | 20050503 | FLOW | 2389-4 |
| 3 | 20052704 | DUS | 5421-4 |
| 4 | 20051005 | LORCA | 5496-2 |
| 5 | 20052706 | KAYA | 8798-6 |

Figure 9: Viewing records in a view not linked to the profile

| ** 1 - Commun | Champs sans groupe | *. Informations Systèmes |
|----------------|--------------------|--------------------------|
| 1 - Commun | | |
| Date : | 20051005 | |
| Code affaire : | 5496-2 | |
| Client : | LORCA | |

Record view using the
"PO (reduced)" view

Figure 10: Displaying a record using the "PO (reduced)" view definition



Reference

If you display data in a view not linked with a profile, EverSuite is capable of finding the profile corresponding to the record and displaying it in the correct profile. It does this when the parameter `&ContextParams=R.VerifProfileURI=yes`

For more on customizing menus, please refer to the EverSuite CORE Administration – Applications and data guide.

3 CONFIGURATION

3.1 INITIALIZE PROFILES

The functional administrator is guided through the entire profile initialization procedure, to make it easy to implement profiles for the first time.

Click on the **Configuration** menu, and then on **Initialize profiles**:



Figure 11: Initialization steps

3.1.1 First step: initialize ES-PRF

First, choose the database where the profiles will be created. In the standard application, profiles are installed in the application's system database, *dPortal*.

Select the installation database for profiles then click on the **[Save]** button.

EverSuite confirms that the **PRFPROFILES** table exists or has been created, ready to receive the characteristics of each profile. The ES-PRF system tables are: **PRFPROFILES**, **PRFRULES**, **CSTRFCFG**, **CSTRFMAP**.



Information

These tables' counter is always managed by the database and not by EverSuite.

3.1.2 Second step: initialize links between ES-PRF and the other services

Next, define which links are possible between the profiles and particular EverSuite services working with profiles, like ES-HDS or ES-MMS. These profile/service tables must be **installed in the same database** as the corresponding **PRFPROFILES** table. In the standard application, profile/service link tables are installed in the system database, *dPortal*.

Select the service which uses the profiles, then the installation database (the same as for **PRFPROFILES**).



Figure 12: Example of initialization set-up

Click on the **[Save]** button. The system confirms that the profile/service link tables exist or have been created, as appropriate.

For example:

Links between the profiles and the ES-MMS \Rightarrow PRFMMS table

Links between the profiles and the ES-HDS \Rightarrow PRFHDS table

The messages are as follows:

Either the tables did not exist:

dPortal.PRFMMS doesn't exist.

dPortal.PRFMMS created.

or the tables existed already:

dPortal.PRFHDS exists.

3.2 LOCATION OF ES-PRF SYSTEM TABLES

EverSuite supports several configurations as described below. The ES-PRF system tables may be initialized in the application's system database (e.g. *dPortal*) or in the application database (e.g. *data*). However, they must always ALL be in the same database:

- General ES-PRF system tables: **PRFPROFILES**, **PRFRULES**, **PRFTRSDOCS**, **CSTRFCFG**, **CSTRFMAP**
- ES-PRF system tables for services (e.g. **PRFHDS**)

All these tables' location is determined by the **prfDBName** parameter.

On the other hand, the secondary link tables are created automatically in the same database as the associated data tables.

In the setups presented below as examples, the database is called DEMO_PRESSE and the two profiles created are PRES (Press) and DOC (Documentation).

3.2.1 First configuration

The ES-PRF system tables are created in the EverSuite system database: **prfDBName** = *dPortal*.

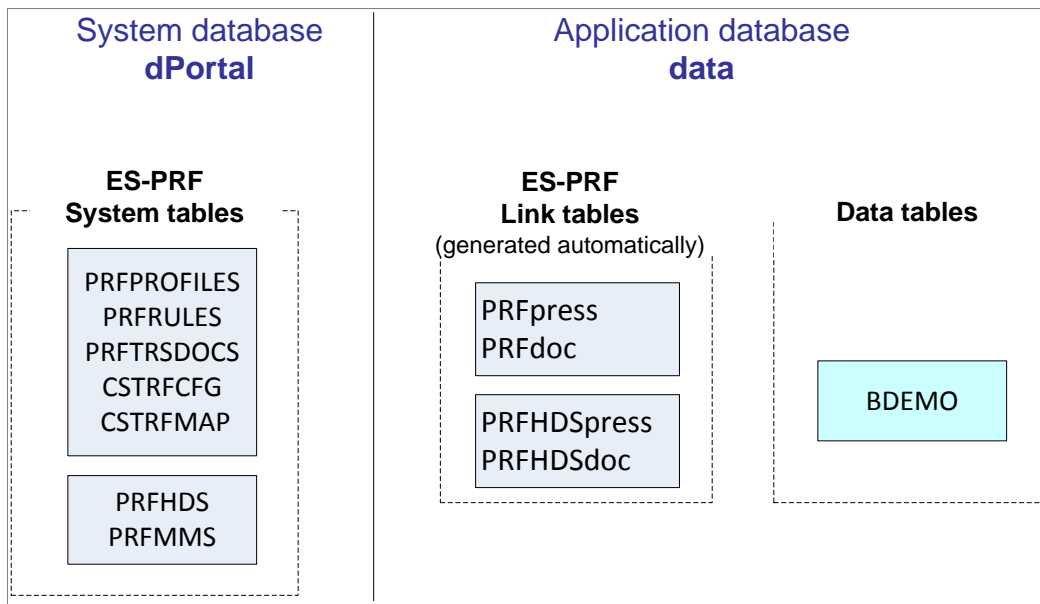


Figure 13: Example of configuration with two databases

3.2.2 Second configuration

The ES-PRF system tables are created in the application database: **prfDBName** = **data**.

The link tables are still created in the "data" database where the BDEMO_PRESSE data table is.

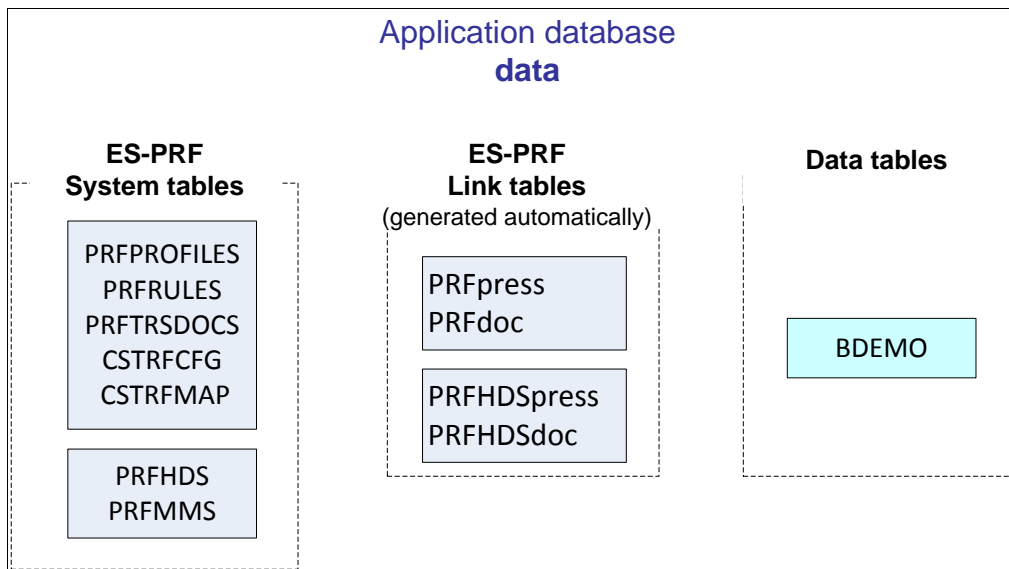


Figure 14: Example of configuration with one database

3.3 DATA MODEL

| PRFPROFILES | |
|--------------|-----|
| PRFDKEY | (*) |
| PRFCODE | |
| PRFLABEL | |
| PRFDBNAME | |
| PRFDBTABLE | |
| PRFPURGDELAY | |
| PRFPURGSQ | |
| PRFPURGCOMB | |
| PRFTARGPRFL | |
| PRFSTORAGE | |

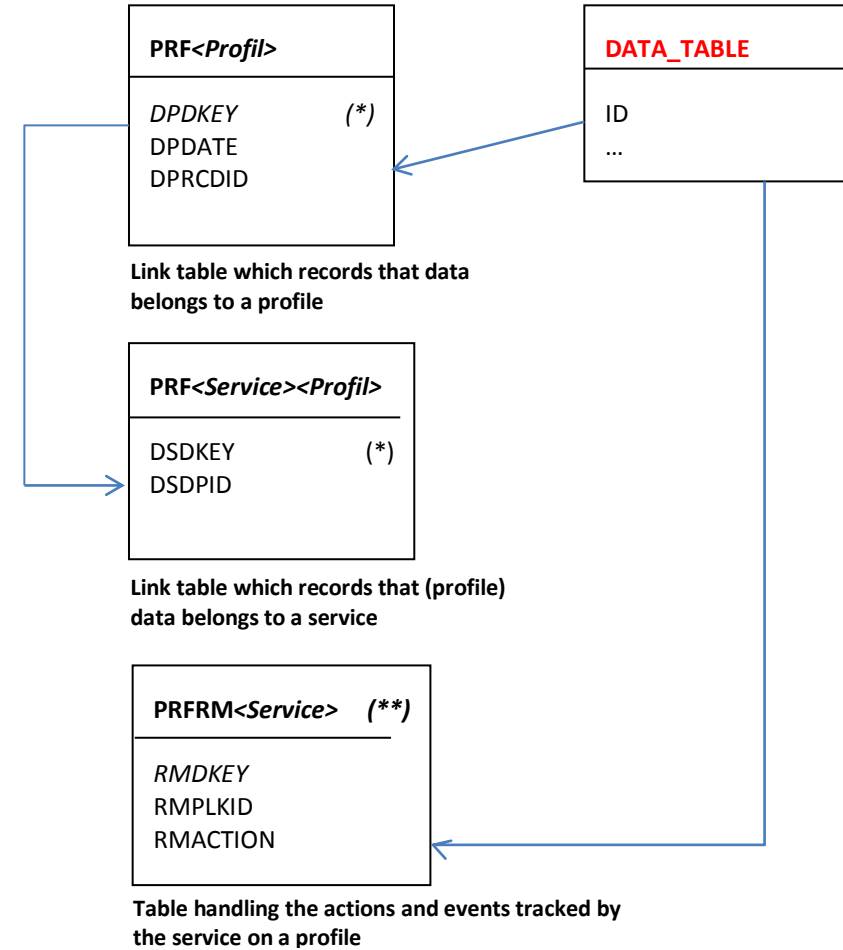
Profile management table

(*) Profile and service codes in the table names allow links to be made

(**) Record Management by service is an upcoming feature.

| PRF<Service> | |
|----------------|-----|
| PLKDKEY | (*) |
| PLKPRFCODE | |
| PLKTBNAME | |
| PLKTYPE | |
| PLKINFOS | |
| PLKPURGDELAY | |
| PLKPURGSQ | |
| PLKPURGCOMB | |
| PLKWKFPSCREATE | |
| PLKWKFPSMODIF | |
| PLKWKFPSSTORE | |
| PLKWKFPSDEL | |
| PLKARGSTORE | |
| PLKSTORETODO | |

Table managing Service / Profile links



CONFIGURATION

Parameters specific to ES-PRF are accessible in the ES-PRF **Parameters** menu.

This screen contains all the parameters which the administrator can modify for his/her application.



Reference

For a detailed explanation of all the ES-PRF parameters, please refer to the **CORE Parameters** guide.

| Parameter | Description | Default value |
|--------------------------------|-----------------------------------------------------------------------------------------------------------------------------|------------------|
| prfActionThreaded | Execute profile tasks in another Thread <i>true / false</i> | <i>false</i> |
| prfAllowModifyPurgeDate | Allow purge date to be modified <i>true / false</i> | <i>false</i> |
| prfCodesExcept | Codes of profiles for which link tables are not used, separated by ',') | <i>Empty</i> |
| PrfDBName | Name of database containing the PRFPROFILES profile table used for the current application | <i>dPortal</i> |
| prfNFZ42013 | Prevent bringing forward a retention date (NF Z42-013 standard) <i>true / false</i> | <i>false</i> |
| prfPath | ES-PRF service path | <i>/apps/prf</i> |
| prfRcdIdLike | DPRCDID column type <i>true</i> (identical to the original table) / <i>false</i> (Varchar) | <i>true</i> |
| PrfRulesMode | Activate record transfer rules <i>true / false</i> | <i>false</i> |
| prfTrsfDeleteOld | When transferring a record profile with its documents, delete related documents on the original profile's storage partition | <i>false</i> |
| prfTrsfDocs | Transfer attached documents when a record changes profile <i>true / false</i> | <i>false</i> |
| prfTrsfRealTime | Transfer attached documents when a record changes profile <i>true / false</i> | <i>false</i> |

| | | |
|----------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------|
| prfUseFor | Profiles usage level: 0: None 1: Links updated 2: Links used for searching updated 3: All links (Profile/service) used for searching updated | 2 |
| prfUseDynCacheTable | Some PRF tables may not be declared even if they are sometimes used for specific processing. These parameters allow them to be used without declaring them, as this can be heavy. <i>true / false</i> | <i>false</i> |
| prfUseOSS | Use OSS partitions <i>true / false</i> | <i>false</i> |

Figure 15: ES-PRF parameters

3.4 INITIALIZE AUTOMATICALLY

3.4.1 Configuration

Profiles can be initialized automatically by the functional 'administrator'.

This option lets you create automatically a profile corresponding to a non-system table. This profile may be directly associated with one or more services.



Caution

If the table is already associated with a non-automatic profile, it no longer appears in the table list.

Click on the **Configuration** menu, then on **Initialize automatically**:

Initialisation automatique des profils

Base de données

Table

Services


☒ HDS
☐ FLD
☐ ESNET
☐ MMS
☐ SAE
☐ CFS

Figure 16: Initializing profiles automatically

All the records in the table are associated with this profile. If the number of records exceeds the threshold of 1000 records, you are again invited to initialize, until all the records have been processed. The number of links created is shown: **Number of records: xx**.



Information

This tool is not identical to the option in the results list  [Automatic profile declaration], which creates the new profile but does not generate any associations with existing records.

Database

This field contains the name of the database containing the SQL table associated with the profile. It is selected from the databases defined in EverSuite.

Table


This field contains the name of the data table associated with the profile. It is selected from the tables in the database selected in the previous field, apart from system tables.

Services

The services for which profiles must be created are selected using the check boxes.

3.4.2 Example

When initializing the **DEMO_REVUE** table, in the *dPortal* database, the following traces are displayed:



Initialisation automatique des profils

Base de données:

Table:

Services: ☐ DRM ☐ HDS ☐ FLD ☐ ESNET ☐ MMS ☐ SAE ☐ CFS

Messages

AUTO1347 doesn't exist.
 AUTO1347 created.
 Number of records : 22

Figure 17: Automatic initialization traces

The profile is created and named automatically, with an "AUTO" prefix followed by a number incremented by the software, here *AUTO1347*.

3.5 ADD RECORDS TO PROFILE

When defining new profiles, you may - as administrator - want to associate them with data which already exists in the database. In ES-PRF you can automatically associate a batch of records with a new profile depending on the query defined in the interface.

Click on the **Configuration** menu, then on **Add records to profiles** menu:

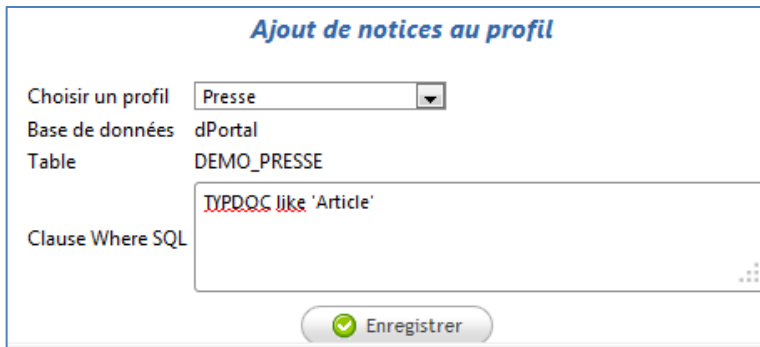


Figure 18: Adding records to a profile

Query examples (SQL Where clause):

DKEY > 0 AND DKEY < 300

TYPE like 'validated'

In the example above: a "Press" profile has been declared in the dportal database, which includes records of type "Article" in the DEMO_PRESSE table.

The following traces are displayed to confirm that the query has been run:

```
<?xml version="1.0" encoding="ISO-8859-1" ?>
  <PRFMngDatas>
    <Done>114</Done>
    <Info>
      <Command> <![CDATA[ QryAddToProfile ]]> </Command>
      <Return> <![CDATA[ true ]]> </Return>
    </Info>
  </PRFMngDatas>
```

Number of records attached to the profile

This indicates that the operation was successful

The records are now associated with the new profile and can be viewed via the **Relational Profiles** menu:































| Code du profil | Base de données | Description | Actions |
|---------------------------------------------|-----------------|------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <div> <div></div> <div>Profils</div> </div> | | | |
| AUTO1347 | dPortal | Revue |    |
| EDEVIS | dPortal | Document entrant Devis |    |
| SDEVIS | dPortal | Document sortant Devis |    |
| DOC | dPortal | Documentation |    |
| SAEDOC | dPortal | Documents |    |
| SAEVEROBJ | dPortal | Eléments de Versements |    |
| EXPLMAIL | dPortal | Exploded Mail |    |
| MAIL | dPortal | Courriels |    |
| PRES | dPortal | Presse |    |
| SAEVERSE | dPortal | Versements |    |

Figure 19: Relational profiles menu



Caution

This administration tool does not check whether a record is already associated with another profile on the table.

It cannot therefore be used if there is already an automatic profile on the whole table (previous scenario).

The tool only checks that the record is not already associated to the current profile (to avoid duplicate references in a profile).



Information

There can be two types of duplicate:

- *Duplicate reference: a record referenced twice in the same profile (check carried out by the service in the tool described above)*
- *Duplicate association: a record associated with several profiles (impossible during normal processing, but not checked by this tool).*

4 ADMINISTRATION

The **Configuration > Administration** menu gives access in particular to profile management, profiles for services, profile rules and record transferring.

4.1 PROFILES

Profiles are managed by the application's functional administrator.






Click on the **Configuration** menu, then on the **Administration > Profiles** menu: the list of all the profiles (regardless of services) is displayed:



| Listes des profils | | |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------|------------------------|
| Actions | Code interne | Libellé |
|    | EDEVIS | Document entrant Devis |
|    | SDEVIS | Document sortant Devis |
|    | SAEDOC | Documents |
|    | SAEVEROBJ | Eléments de Versements |
|    | AUTO757 | Coupure de presse |
|    | PRES | Presse |
|    | SAEVERSE | Versements |

Figure 20: Managing profiles

The following actions are available:

| | |
|-------------------------------------------------------------------------------------|------------------------------------------|
|  | Update the profile list after adding one |
|  | Add a new profile |
|  | View/Modify profile |
|  | Delete profile |
|  | Check purge |



Information

This menu lists all the profiles in the profile table, [PRFPROFILES] in the EverSuite database declared in the prfDBName parameter.


An application may have several PRFPROFILES tables in different databases, but only ever works on one table PRFRPROFILES table at a time.

4.1.1 Add/Modify a profile

To add a profile:

⇒ Click on the  button.

To modify or complete the definition of an existing profile:

⇒ Click on the  icon [View/Modify profile]



Caution

A profile's code is assigned when it is created and cannot be modified later.


The profile input form is displayed: three types of information are accessible in the tabs:

- Information relating to the profile
- Information relating to its purge
- Information relating to its storage



Figure 21: Creating/updating a profile

A click on  restores the last values saved.

A click on  empties the contents of the link tables between records and the current profile.

A click on  saves the changes made.

Profile

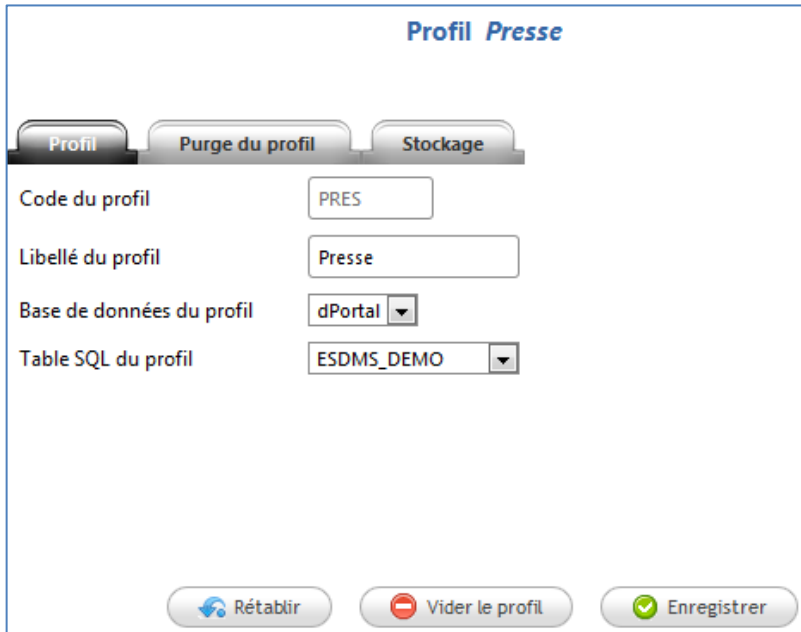


Figure 22: Creating/updating a profile: System attributes tab

Profile code

The profile's internal code enables it to be identified outside the EverSuite application. It is an alphanumeric string with up to 9 characters. This code must not be modified, as it is used to name the link tables created between a profile and a data table.

In addition, this code is used as an identifier during imports and exports. Modifying this code can lead to serious errors during external processing.

Profile label

The logical name of the profile is displayed in selection lists. This label must correspond to a code which is then translated into different languages. If this code is not translated, it will be displayed as is in all the different interfaces.

Profile database

The database containing the SQL table associated with the profile is selected from the databases defined in EverSuite.

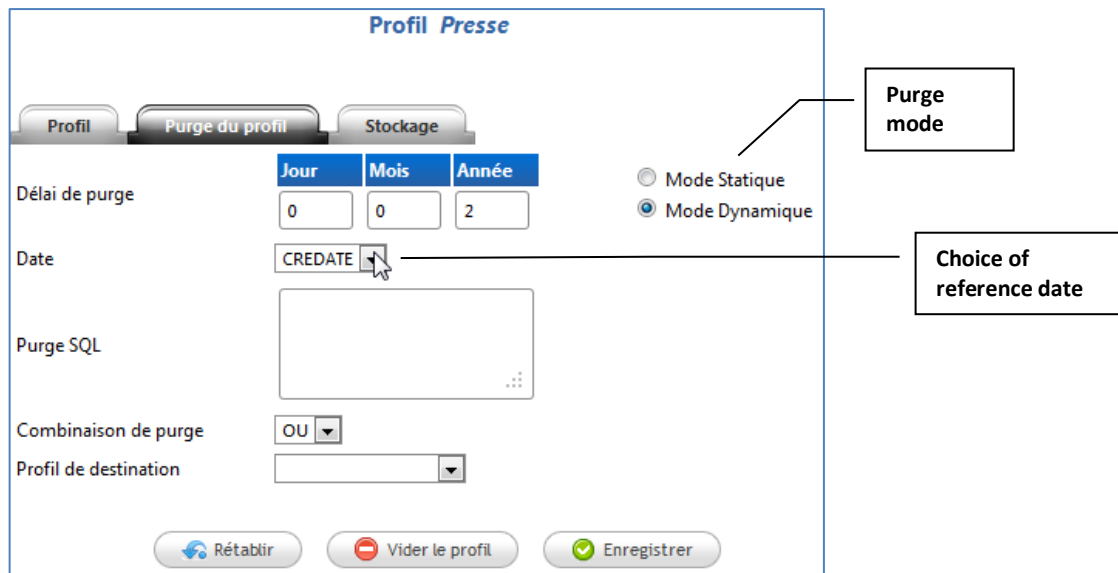
Profile SQL table

The data table associated with the profile is chosen from the tables in the database selected above, except system tables.

The attributes of a record correspond to the fields in the SQL table, declared in EverSuite.

Profile purge

The lifespan of a SQL record depends on the **purge interval** given in the profile. This interval is based either on a date, or on a query, or on a combination of the two.



The screenshot shows the 'Profil Presse' interface with the 'Purge du profil' tab selected. The 'Délai de purge' section has three input fields: 'Jour' (0), 'Mois' (0), and 'Année' (2). The 'Date' section has a dropdown menu showing 'CREDATE'. The 'Purge SQL' section has a text area. The 'Combinaison de purge' section has a dropdown menu showing 'OU'. The 'Profil de destination' section has a dropdown menu. The 'Purge mode' section has two radio buttons: 'Mode Statique' and 'Mode Dynamique'. Callouts point to the 'Purge mode' and 'Choice of reference date'.

Figure 23: Creating/updating a profile: Profile purge tab

Purge interval and Date

This interval is calculated in one of two modes, *Static* or *Dynamic*, using the information in the profile declaration:

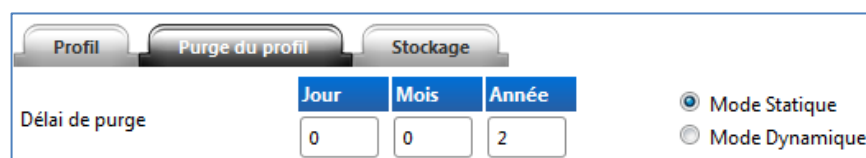
Static mode

The interval is calculated as the duration expressed as a number of days, months or years added to the **date the record was inserted** into EverSuite.

Dynamic mode (default)

The interval is calculated as the duration expressed as a number of days, months or years added to the **date** in the given field.

For a two-year purge interval:



The screenshot shows the 'Profil Presse' interface with the 'Purge du profil' tab selected. The 'Délai de purge' section has three input fields: 'Jour' (0), 'Mois' (0), and 'Année' (2). The 'Date' section has a dropdown menu showing 'CREDATE'. The 'Purge SQL' section has a text area. The 'Combinaison de purge' section has a dropdown menu showing 'OU'. The 'Profil de destination' section has a dropdown menu. The 'Purge mode' section has two radio buttons: 'Mode Statique' (selected) and 'Mode Dynamique'.

The reference data is the date the record was inserted into the database with this profile.

Figure 24: Purge interval in static mode

Figure 25: Purge interval in dynamic mode

The reference date is the date in the **Date** field, selected in the profile from the list of the record's **date** fields.



Caution

The date used for calculating the purge interval is the date in the field when the record is inserted into the profile. If this date is changed later, its new value will not be taken into account when calculating the purge interval.

SQL purge

This field is available in dynamic mode.

The query runs a **select** on the primary key of the table and not a **select ***.

Example 1: To delete e-mails received in a distribution list, xml-tech+xmlfr.org, you can use a query like this:

```
select MAILTABLE.TMAIL_DKEY from MAILTABLE
where MAILTABLE.TMAIL_SUBJECT like 'ES Risk workshop'
```

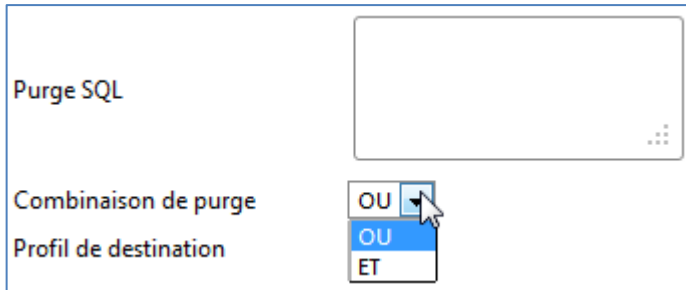
Example 2: To move records to another profile when they are updated (e.g... when the NUM field is set to '99').

Here is the definition of the purge criterion for the **Archimag** profile:

Figure 26: SQL purge and destination profile

Combining purge conditions

The two criteria, **Purge interval** and **SQL purge**, may be combined. When the condition is met, the SQL record becomes a candidate for deletion (see below). These parameters can be using one of the **Purge combination** options: **OR** or **AND**.



Purge SQL

Combinaison de purge

Profil de destination

Figure 27: Combining purge conditions

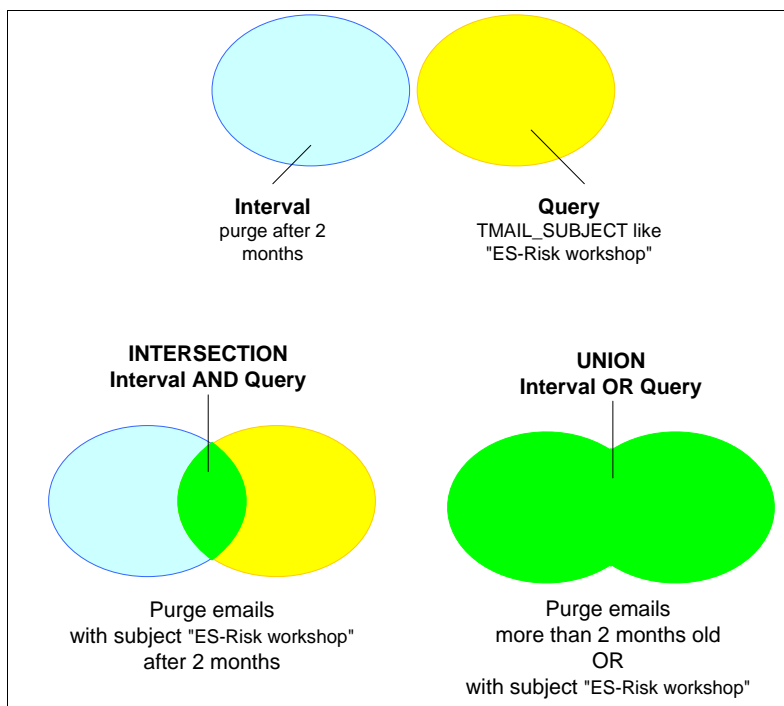


Figure 28: Diagram - Combining purge conditions

Running the purge

A purge can be triggered globally or for one of the profiles or services given. There are two purge modes.

Using a URI

For example:

`http://[server]:[port]/[appl]/PRFMngProfiles?PRFService=Purge&Command=Purge&OnlyServices=false&ServicesNames=All&ProfilesCodes=All`

ServicesNames: **All** or list of services to purge separated by a /

ProfilesCodes: *All* or list of profiles to purge separated by a /

OnlyServices: *true* to purge only the services

Using the ScheduleManager with the following parameters as arguments

1st argument <arg> *All*

or list of services to purge separated by a /

2nd argument <arg> *All*

or list of profiles to purge separated by a /

3rd argument <arg> *true*

to purge only the services

Example:

```
<?xml version="1.0"?>
<param>
  <notask>
    <class>es.cls.portal.voffice.clsDiffList</class>
    <periodicity>300000</periodicity>
  </notask>
  <task>
    <class>es.cls.prf.prfPurge</class>
    <periodicity>60000</periodicity>
    <entrypoint>purge</entrypoint>
    <session>
      <usercode>admin</usercode>
    </session>
    <args>
      <arg>All</arg>
      <arg>All</arg>
    </args>
  </task>
</param>
```

Destination profile

This option allows a record to be associated with another profile, when the purge conditions are met. At the end of a document's life, if a destination profile has been configured, the data is not destroyed, but instead now belongs to this destination profile and may possibly be managed by one or more other services. The data may be associated with an electronic archiving profile, for example.

The destination profile is selected from the list of profiles defined in the application for this SQL data table or on another table's profile if a profile transfer to this table has been configured.

Storage

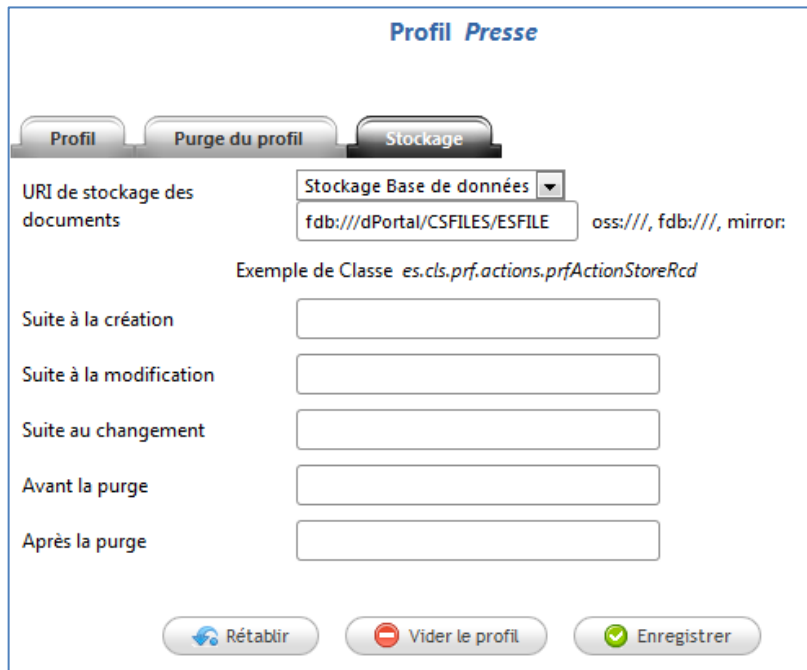


Figure 29: Creating/updating a profile: Storage tab

Two URIs are permitted for storing attached documents. File storage can be handled by:

- ES-OSS, for storage in a specified partition:
OSS:///site number/storage partition name or number/
Example: OSS:///1/3/

The documents associated with the record are automatically stored in the partition or table specified by the URI, at the time they are attached.

- ES-CORE, for storage in a database:
fdb:///dPortal/CSFILES/ESFILE
Example: fdb:///dPortal/CSFILE/ESFILE

The **CSFILES** table is proposed by default, but storage may be adapted to your environment, provided that the storage field (e.g. ESFILE) is a **Blob** or **VARBINARY**. These are "string" data types for storing character strings with encoding.

The name of the document is automatically copied into the **FILE_NAME** field if there is one in the table.

| | + | - | Ordre | Nom | Type SQL | Type | Min | Objet | Taille | Ins | Mod | Rech | Vis | Champ d'unicité | Contrôle |
|--|---|---|-------|-------------|-----------|---------|-----|-------------|--------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|----------|
| | + | - | 1 | DKEY | INTEGER | Numeric | | ES_TextBox | 0 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | |
| | + | - | 2 | ESFILE | VARBINARY | String | | ES_TextArea | 80 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | |
| | + | - | 3 | DATE_INSERT | VARCHAR | String | 1 | ES_TextBox | 50 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | |
| | + | - | 4 | TIME_INSERT | VARCHAR | String | 2 | ES_TextBox | 30 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | |
| | + | - | 5 | FILE_NAME | VARCHAR | String | 3 | ES_TextArea | 80 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | |
| | + | - | 6 | ESFILEXML | VARCHAR | String | | ES_TextArea | 80 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | |

Figure 30: Description of the CSFILES table

When an end-of-life destination profile indicates another partition (different URI), the documents are then transferred to this new partition. If the destination profile does not indicate any other partition (no URI), the documents remain in the original storage partition.

4.1.2 Delete a profile

It is only possible to delete a profile if it is no longer linked to any record in the data table (see above).

⇒ Click on the icon  [Delete profile]

If this is not the case, a message is displayed and deletion is not permitted:

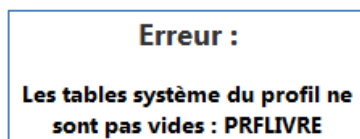



Figure 31: Error message when deleting a profile

4.1.3 Check the purge

By clicking on the icon  for the profile in the list, you access the tool for checking the purge on the profile. It lets you check how many records associated with this profile are affected by the purge, for a range of dates.

Example: How many records in the BDEMO table, associated with the "Press" profile will be deleted between now and 1st February 2013?



Figure 32: Checking the purge

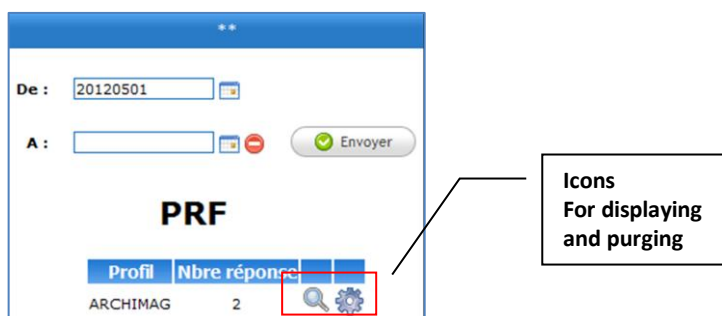


Figure 33: Display and purge icons

The [Display] icon displays records which match the criterion:

| N° | Clé | Périodique | Auteur | Titre | Numéro | Mots-clés | Version | Résumé |
|----|-----|------------|------------------|----------------------------------------------------|--------|------------------------------------------|---------|--------|
| 1 | 38 | ARCHIMAG | ROUMIEUX Olivier | Rencontres de l'ADBS : l'emploi en ligne ... de mi | 99 | emploi/documentation/internet | | oui |
| 2 | 39 | ARCHIMAG | REMIZE Michel | EUROPE : Les bibliothèques en leur siècle | 99 | europe/bibliothèque/technologie/histoire | | oui |

Figure 34: Result of a search / purge

The [Purge] icon runs the purge, that is, the change of profile: the records previously displayed are moved to the *Garbage* profile (Purge destination profile) and are no longer associated with the *Archimag* profile.

4.2 PROFILES FOR SERVICES

EverSuite allows you to refine profiles for the purposes of a particular service, by providing more options which relate to how the profile is used by a service.

Among the extra options are the following:

- define a special view on the data table corresponding to the profile,
- define Workflow processes,
- add an extra purge condition which only applies to the service.

Example:

An email (i.e. a record in the MAILTABLE table) may only be in the ES-HDS tree view for two months, but can be consulted in the email folder for one year in ES-MMS.

Click on the **Configuration** menu, then on the **Administration > Profiles for services** menu. The first thing to do is to select the service.

Example:

Service: HDS (selected)

Base de données: dPortal

System table database: PRFPROFILES, PRFHDS, etc.


Actualiser


Ajouter un profil

| Actions | Code interne | Libellé | Type |
|---------|--------------|-------------------|-----------|
| | SAEDOC | Documents | Inutilisé |
| | AUTO757 | Coupure de presse | Objet |

Figure 35: Managing profiles and services

4.2.1 Add a profile for a service

To add a profile to use in a service, click on 

To modify or complete the definition of an existing profile, click on the  icon [View/Modify profile]

The form is organized along the same lines as for a standard profile standard, with information specific to the service.

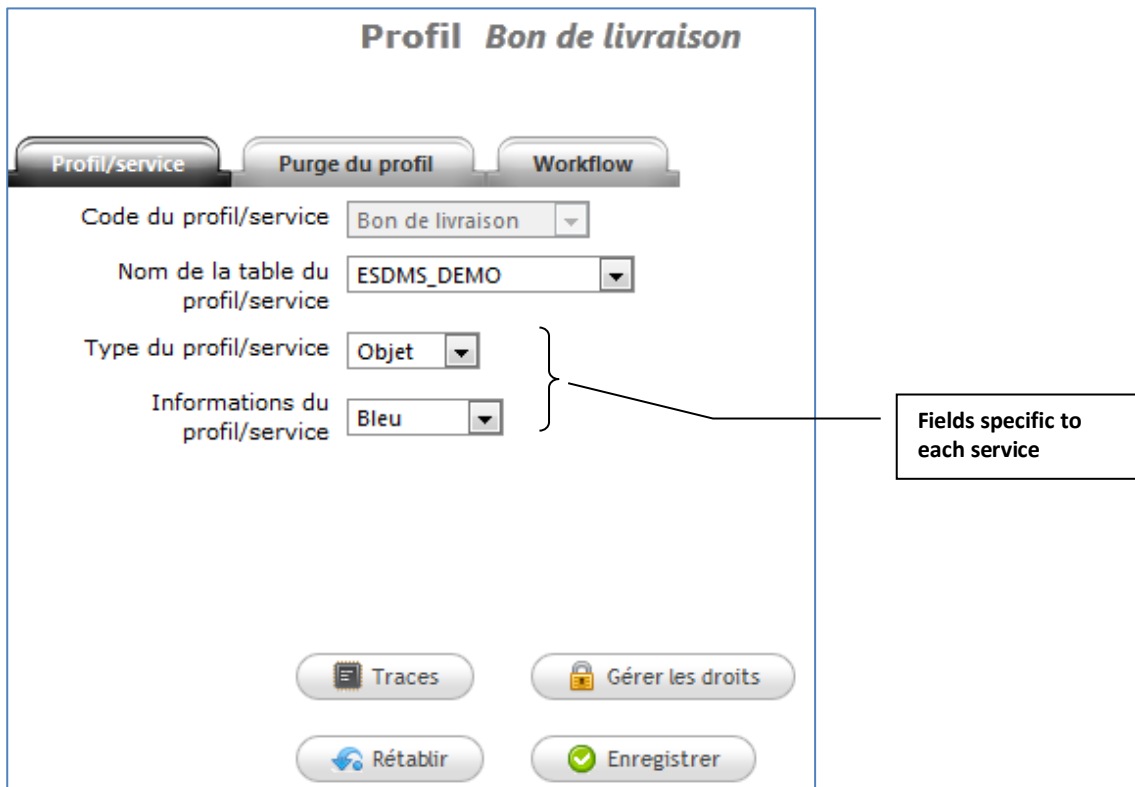
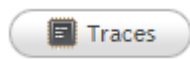
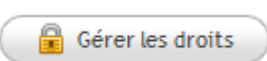

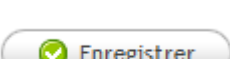


Figure 36: Creating/updating a profile for ES-HDS: Profile/Service tab

-  **Traces** allows you to select the logs you wish to display.
-  **Gérer les droits** lets you configure special rights on this profile.
-  **Rétablir** restores the last values saved.
-  **Enregistrer** saves the changes made.

Profile/service tab

Profile/service code

The profile is chosen from the list of profiles which already exist in the application, and not already in the list on the left for this service.

Profile/service table name

The name of the table is selected from the tables and views associated with the profile.

Fields specific to the service

Two fields in the table are managed specifically for each service: the **Profile/service Type** (PLKTYPE), and the **Profile/service Information** (PLKINFOS).

Thus, **ES-HDS** uses them to give the type of element handled and a qualifier on the element (**PRFHDS table**). **ES-MMS** does not use them (**PRFMMS table**).

Profile/service type

This is for specifying the type of the profile (profile on an object, folder or group) and affects how the next field is displayed (Profile information).



Figure 37: Profile/service type

Profile/service information

- If it is a profile for an object or a folder, this field is for specifying the color used to display the objects/folders targeted by a profile.

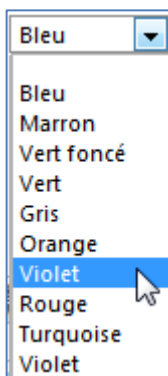


Figure 38: Profile/service information for an object

- For a "Group" profile on a group of profiles:

A "group" profile is for grouping profiles together for a specific purpose, for instance for an ES-HDS folder to allow documents with different profiles to be filed in the same folder.

A "Group" profile does not have to be attached to one particular table (like an empty shell). This means it can group profiles which apply to different tables.

Profil Profils HDS

Profil/service | **Purge du profil** | **Workflow**

Code du profil/service: Profils HDS

Nom de la table du profil/service: [dropdown]

Type du profil/service: Groupe

Informations du profil/service:

- ☒ Bon de livraison
- ☒ Fiche technique d'intervention
- ☒ PV Recette
- ☒ Dossier de lancement

Figure 39: Profile/service information for a group of profiles

When defining a folder, it is then possible to choose this grouped profile (instead of a particular profile).

Profil de l'élément: Profils HDS

Profil du dossier: Pas de type spécifié

Figure 40: Choosing a grouped profile

Profile purge tab

In this context, a purge only affects consulting data in the service and does not actually delete any data.

As for standard profiles, two options are given: purge interval or purge based on a SQL query, as well as a combination of the two conditions.

Profil Bon de livraison

Profil/service | **Purge du profil** | **Workflow**

Délai de purge:

| Jour | Mois | Année |
|------|------|-------|
| 0 | 0 | 1 |

Purge SQL: TFOLD_PROJECT like 'Projet 2012'

Combinaison de purge: ET

Figure 41: Creating/updating a profile for ES-HDS: Profile purge tab

Workflow tab

A Workflow process makes it possible to define a set of tasks to carry out automatically during a document's lifecycle.



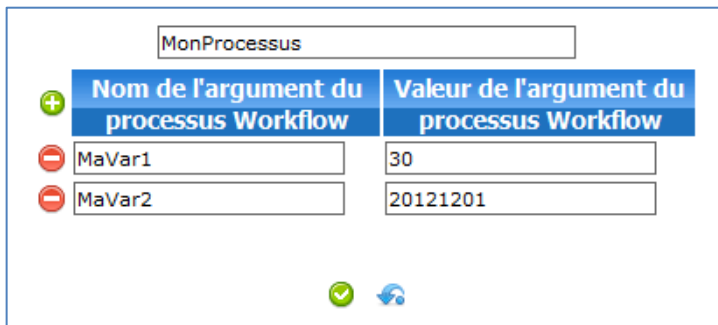


Figure 42: Parameters of a profile four ES-HDS (3)- List of associated processes


A click on the  button opens a window where you can define a process.





| Nom de l'argument du processus Workflow | Valeur de l'argument du processus Workflow |
|-----------------------------------------|--------------------------------------------|
| MaVar1 | 30 |
| MaVar2 | 20121201 |

Figure 43: Example of declaration of variables for a process

A process must be identified by its name. You can assign values to variables which are reserved for it.

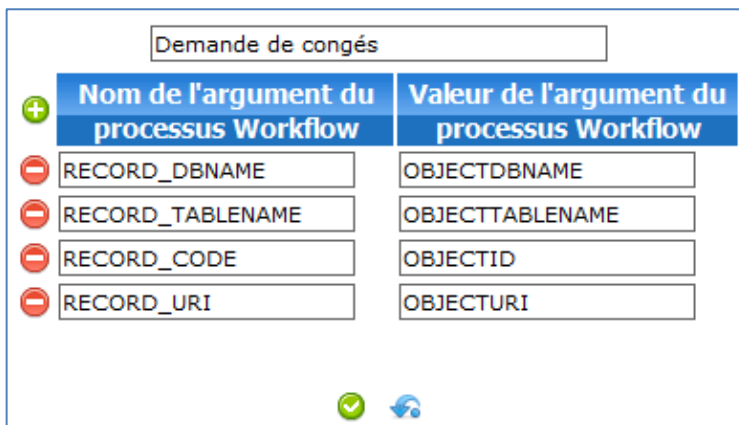
The  icon is for adding a variable line

The icon  deletes a line.

A click on  saves the process information. A click on  restores the last values saved.

Six static variables are automatically recognized by EverSuite. They may be used as "argument values":

- *OBJECTURI*
- *OBJECTID*
- *OBJECTDBNAME*
- *OBJECTTABLENAME*
- *OBJECTDBTABLE*
- *OBJECTPROFILE*



| Demande de congés | |
|-----------------------------------------|--------------------------------------------|
| Nom de l'argument du processus Workflow | Valeur de l'argument du processus Workflow |
| RECORD_DBNAME | OBJECTDBNAME |
| RECORD_TABLENAME | OBJECTTABLENAME |
| RECORD_CODE | OBJECTID |
| RECORD_URI | OBJECTURI |

Figure 44: Example of a process declaration for a profile

4.2.2 Manage rights on a ES-HDS profile

In the **ES-HDS** service, it is possible to configure specific rights on profiles, for users or roles (groups of users). A profile may be applied to several users with different rights.

These profiles can only be for *Object* type elements. The rights are then applied for all the records in the table, which are linked to this profile.

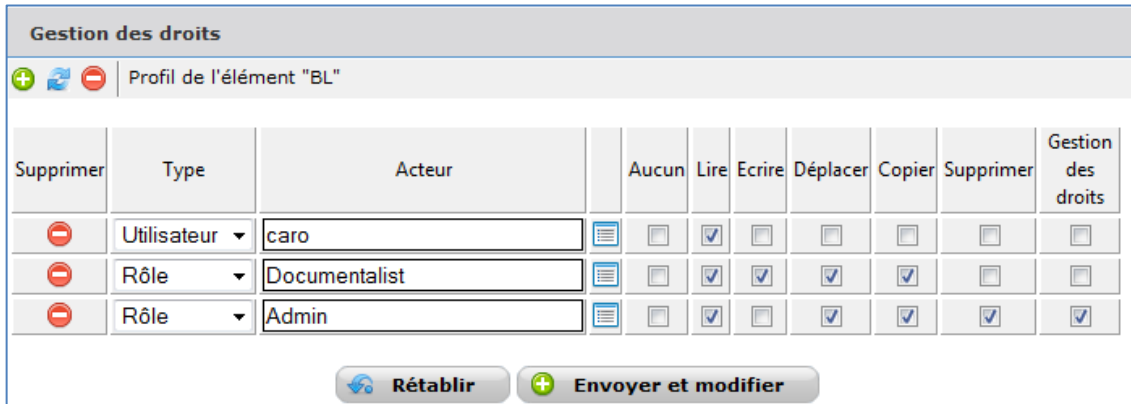


Information

The rights defined on these profiles are in addition to the ones defined on the elements themselves in the SQL table in ES-HDS. These rights may be wider or more restrictive. The combination between the two sets of rights is then configured as either a UNION or an INTERSECTION.

See documentation on the rights in the ES-HDS service and on configuring the API.

Click on the  button in the profile record:



| Supprimer | Type | Acteur | Aucun | Lire | Ecrire | Déplacer | Copier | Supprimer | Gestion des droits |
|-----------|-------------|---------------|-------|--------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| | Utilisateur | caro | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| | Rôle | Documentalist | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| | Rôle | Admin | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

Rétablir Envoyer et modifier

Figure 45: Configuring rights

Each line of the table corresponds to the rights of a particular user or a role (group of users).

Managing the rights list

Add an actor

⇒ Click on the icon [Add] in the toolbar.

Rights are for a particular user or group of users in a role (**Type** field). The name of the user or role is selected from the list which opens when you click on the icon [List] next to the **Actor** field.

Refresh the list

⇒ Click on the icon [Refresh] in the toolbar.

This restores the last values saved and deletes all the lines added or modified since the last save.

Initialize the list

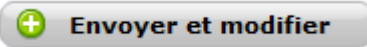
⇒ Click on the icon [Clear] in the toolbar.

This deletes all the special rights set up for users or roles: all the rights are cleared, after confirmation.

Delete an actor

⇒ Click on the icon on the line to be deleted: the special rights for this user or role are deleted.

Save the list

⇒ Click on  .

Restore the list

⇒ Click on  .

This clears all the rights while keeping the identified actors.

Characteristics of a line of rights

⇒ Check the boxes corresponding to the rights you wish to assign to the selected actor.

- | | |
|-------------------------------|--------------------------------------------|
| ■ Read | Right to consult the element |
| ■ Write | Right to modify the element's attributes |
| ■ Move | Right to move the element in the tree view |
| ■ Copy | Right to copy the element |
| ■ Delete | Right to delete the element |
| ■ Manage access rights | Right to manage rights on the element |



Information

Double-click a box to select all the rights. To deselect everything, click on "None" or uncheck "Read".

4.3 PROFILE RULES

Profiles are managed by the application's functional administrator.

This option lists all the rules which exist in EverSuite. It lets you **transfer** a record between two profiles on the same table based on a SQL condition, when adding or updating this record. If the rule applies, the record is filed in the corresponding profile.



Information

Note: The profile rule also applies when inserting a record in the Administration > Data sources -> Relational menu (Mode: Insert).

However the rule does not apply when updating in the Administration > Data sources -> Relational menu. For it to apply, you must choose the Administration > Data sources -> Relational by profile menu, or use a function which takes profiles into account.

Click on the Configuration menu, then on the Administration > Profile rules menu.





| <div>  Actualiser  Ajouter une règle de profil </div> | | |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|---------------|
| Règles de profil | | |
| Actions | Nom interne | Libellé |
|   | BLToBLbis | BL vers BLbis |

Figure 46: Rules management

4.3.1 Add/Modify a profile rule

To add a rule:

⇒ Click on the icon 

To modify or complete the definition of an existing rule:

⇒ Click on the  icon [View/Modify profile rule]



Caution

1 - A rule's code is assigned when it is created and cannot be modified later.

2 - For a rule to apply, the *prfRulesMode* parameter must be set to **true**.

Règle de profil *BL vers BLbis*

Code

Libellé

Règle SQL

TFOLD_DOKEY > 0

Mode

Modifier

Profil source

Bon de livraison

Profil destination

BLbis

Rétablir

Enregistrer

Figure 47: Creating/updating a profile rule

A click on  Valeurs par défaut restores the last values saved.

A click on  saves the changes made.

Code

The rule's internal code enables it to be identified outside the EverSuite application. It is an alphanumeric string with up to 9 characters. This code must not be modified, as this can lead to serious errors during external processing.

Label

The logical name of the profile is displayed in selection lists. This label must correspond to a code qui which is then translated into different languages. If this code is not translated, it will be displayed as is in all the different interfaces.

SQL rule

The transfer between two profiles on the same table is conditional on this SQL query. This field contains the condition which comes after the "where" in a SQL query.

Mode

Determines whether the profile transfer is done when adding or updating.


Source profile

Name of the profile which is the source of the transfer.

Destination profile

Name of the profile which is the destination of the transfer.

4.3.2 Delete a profile rule

Click on the  icon to delete a profile rule.

4.4 TRANSFER RECORDS

Record transfers are managed by the application's functional administrator.

Whereas the profile rules make it possible to change the profile of records belonging to the same table, the transfer feature allows profiles to be changed for records belonging to different tables. They may be used after defining a profile for transferring a record to another profile on another table.

Transferring records to another table depends on two configurations:

- a transfer configuration (*mapping*)
- a profile rule and its condition (see above).

Click on the **Configuration** menu, and then on the **Administration > Transfer records** menu.

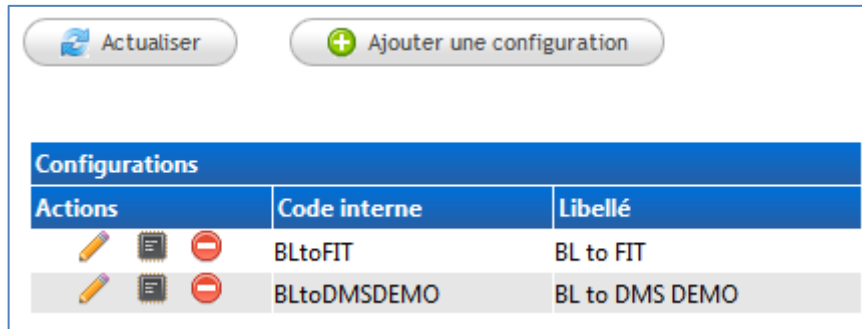
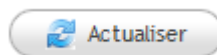
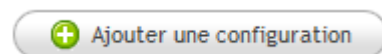


Figure 48: Managing record transfers

The following actions are available:



Update the list of transfers after adding one



Configure a new transfer



View/modify a configured transfer



Map fields

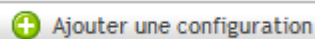


Delete a configuration.

4.4.1 Add/Modify a record transfer

To configure a new transfer:

⇒ Click on the icon



To modify or complete the definition of an existing configuration:

⇒ Click on the  icon **View/Modify**



Caution

A configuration code is assigned when it is created and cannot be modified later.

Configuration de transfert *BL to FIT*

| | |
|------------------------------------------------|----------------------------------------------------------------------------------------------------|
| Code | <input type="text" value="BLtoFIT"/> |
| Libellé | <input type="text" value="BL to FIT"/> |
| Base de données associée au profil source | <input type="text" value="dPortal"/> |
| Profil source pour le transfert | <input type="text" value="Bon de livraison"/> |
| Table associée au profil source | <input type="text" value="ESDMS_DEMO"/> |
| Base de données associée au profil destination | <input type="text" value="dPortal"/> |
| Profil destination pour le transfert | <input type="text" value="Fiche Technique d'Intervention"/> |
| Table associée au profil destination | <input type="text" value="ESDMS_DEMO_T1"/> |
| Interpréteur | <input type="text" value="es.cls.core.tools.Interpreter"/> <i>es.cls.core.tools.Interpreter</i> |

Figure 49: Characteristics of a configured transfer

A click on  restores the last values saved.

A click on  saves the changes made.

Code

The internal code of the configuration must not be modified.

Label

The logical name of the configuration is displayed in selection lists. This label must correspond to a code qui which is then translated into different languages. If this code is not translated, it will be displayed as is in all the different interfaces.

Database associated with the source profile

The database containing the SQL table associated with the source profile is selected from the databases defined in EverSuite.

Source profile for the transfer

The profile selected as the source for the transfer determines which table is associated with the source profile.

Table associated with the source profile

The data table displayed is the one associated with the source profile selected above.

Database associated with the destination profile

The database containing the SQL table associated with the destination profile is selected from the databases defined in EverSuite.

Destination profile for the transfer

The profile selected as the destination for the transfer determines which table is associated with the destination profile.

Table associated with the destination profile


The data table displayed is the one associated with the destination profile selected above.

Interpreter

This parameter makes it possible to initialize destination fields by concatenating several source fields. It is not necessary for a simple *Mapping* between two identical tables.

4.4.2 Field mappings

To transfer records belonging to tables with different structures, a mapping has to be defined between the fields in the two tables.

⇒ Click on the  icon [Map fields] for the configuration in question.

1st case: the Interpreter field is empty

For each field in the target table (on the right), all the fields in the source table (on the left) are available in a drop-down list. The fields in the destination are organized in tabs, as for the table description.

Correspondance des champs : Transfert vers DEMO_PRESSE

1. Description 2. Auteurs 3. Intervenants 4. Informations complémentaires

1. Description

→ Type de document

→ Revue

→ Site web

→ N° revue

→ Titre

→ Date

→ Mots-clés

→ Description

→ Langue

→ Résumé

→ Support

→ Nouveauté

Figure 50: Mapping fields for a transfer with no interpreter

2nd case: the Interpreter field is not empty (es.cls.core.tools.Interpreter)

The interpreter offers to map the fields it has been able to identify. In the same way, fields in the destination table are organized in tabs, as for the table description.

Correspondance des champs : Transfert vers DEMO_PRESSE

1. Description 2. Auteurs 3. Intervenants 4. Informations complémentaires

1. Description

→ Type de document

→ Revue

→ Site web

→ N° revue

→ Titre

→ Date

→ Mots-clés

4. Informations complémentaires

→ Version

→ Commentaires

→ Modifié le

→ Saisi par

→ Modifié par

→ Compteur Presse




Figure 51: Mapping fields for a transfer with an interpreter

Field recognition is based solely on field names. It is up to the administrator to check that the data to be transferred is compatible, based on the controls declared in the destination table.

Input Help

If the **Interpreter** field contains the value `es.cls.core.tools.Interpreter`, help is provided on initializing the destination fields with concatenations of source fields.

A click on the  icon the help completes the form for the following table:

 Rétablir
 Enregistrer


| Mot-clé | Description |
|-------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------|
| <code>concat(String1,String2, ...)</code> | Concaténation de toutes les chaînes en argument |
| <code>date(yyyyMMdd)</code> | Date du jour avec le format spécifié |
| <code>date_format(StringDate,OldFormat,NewFormat)</code> | Transforme une date chaîneDate formatée dans le format chaîneFormatOrigine vers le format chaîneFormatDestination |
| <code>first(String1,String2, ...)</code> | Donne la première chaîne non vide |
| <code>text_substring(String,IndexBegin,IndexEnd)</code> | Donne l'extrait de la chaîne compris entre le caractère numéro « IndexBegin » et « IndexEnd ». Le premier caractère est d'indice 0 |
| Champs | |
| / EXTRAITDE / AUTEUR / TITRE / NUM / MOTSCLES / VERSION / DKEY / ACCORD / CREDATE / | |

Syntaxe et mots clés acceptés dans le champ cible

Liste des champs sources employés

Figure 52: Input help

4.4.3 Delete a configured transfer

Click on the  icon to delete a transfer configuration.

5 RELATIONAL MENU




The **Relational** menu in ES-PRF gives direct access to data tables via profiles. In other words, any processing which is dependent on the profile will only be done in this context or in the equivalent menu, **Administration > Data source > Relational by profile**.



Caution

If you access data in the Administration > Data source > Relational menu, without specifying a profile, no profile-dependent processing will be carried out.

It is for listing all the profiles in the application or by service with the three basic functions:

-  [Add]: add a record associated with the profile
-  [List]: list all the records associated with the profile
-  [Search]: search records associated with the profile.





























































| Code du profil | Base de données | Description | Actions |
|----------------|-----------------|------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Profils | | | |
| AUTO1347 | dPortal | Revue |    |
| EDEVIS | dPortal | Document entrant Devis |    |
| SDEVIS | dPortal | Document sortant Devis |    |
| DOC | dPortal | Documentation |    |
| DOCDMS | dPortal | Documentation ESDMS |    |
| SAEDOC | dPortal | Documents |    |
| SAEVEROBJ | dPortal | Eléments de Versements |    |
| EXPLMAIL | dPortal | Exploded Mail |    |
| LIVRE | dPortal | Livres |    |
| MAIL | dPortal | Courriels |    |
| POUB | dPortal | Poubelle |    |
| PRES | dPortal | Presse |    |
| GROUP | dPortal | Profils hds |    |
| SAEVERSE | dPortal | Versements |    |
| CUSTNODE | dPortal | Dossier client |    |
| BL | dPortal | hdsSolDO |    |
| FIT | dPortal | hdsSolFIT |    |
| PV | dPortal | hdsSolRVRec |    |
| DOSSLCT | dPortal | hdsSolStartDocs |    |
| TYPEDOC | dPortal | typedoc |    |
| DRM | | | |
| HDS | | | |
| FLD | | | |
| ESNET | | | |
| MMS | | | |
| SAE | | | |
| CFS | | | |

Figure 53: List of all profiles

























































| Code du profil | Base de données | Description | Actions |
|----------------|-----------------|--------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Profils | | | |
| BLbis | dPortal | BLbis |    |
| BL | dPortal | Bon de livraison |    |
| EDEVIS | dPortal | Document entrant Devis |    |
| SDEVIS | dPortal | Document sortant Devis |    |
| SAEDOC | dPortal | Documents |    |
| SAEVEROBJ | dPortal | Eléments de Versements |    |
| FIT | dPortal | Fiche Technique d'Intervention |    |
| PRTRASH | dPortal | Poubelle |    |
| AUTO757 | dPortal | Coupure de presse |    |
| PRES | dPortal | Presse |    |
| SAEVERSE | dPortal | Versements |    |
| HDS | | | |
| SAEDOC | dPortal | Documents |    |
| BL | dPortal | Bon de livraison |    |
| AUTO757 | dPortal | Coupure de presse |    |
| FLD | | | |
| ESNET | | | |
| MMS | | | |
| SAE | | | |
| SAEDOC | dPortal | Documents |    |
| SAEVEROBJ | dPortal | Eléments de Versements |    |
| SAEVERSE | dPortal | Versements |    |
| CFS | | | |
| EDEVIS | dPortal | Document entrant Devis |    |
| SDEVIS | dPortal | Document sortant Devis |    |

Figure 54: List of profiles by service



Reference

For more information on these features, please refer to the *EverSuite CORE Administration - Applications and data guide*.

5.1 CUSTOMIZED MENU

When creating a customized application menu, for profiles to be taken into account, you must add a specific parameter to the URL: **ContextParams**.

1. Define a profile for the data table
2. Add the **ContextParams** parameter to the URL of the customized menu

Any search, update or insertion done via these menus will use the profiles indicated in the URL.

The **ContextParams** parameter contains the following attributes:

| | |
|------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| R.ProfileURI | Name of the profile and the database |
| R.ProfileContext | Name of the service in which this profile is applied (e.g. HDS or MMS) or the general profile context (e.g. PRF) |
| R.SERVICENAME | Name of the service (if R.ProfileContext is not PRF). This attribute is used by CSS, logs, and when searching (see the values of the prfUseFor parameter: from 1 to 3). |

Example of URL for a "Record list" menu on the BDEMO table:
Define the "doc" profile on BDEMO, for records of type "Documentation"
Add the context parameters to the URL searching records of type "doc"

```
ShowPage?
Template=Search/frmSearchAndRecords.htm&CheckRight=false&DBName=esdts_data
&TableName=BDEMO&UseFM=yes
&ContextParams=R.ProfileURI=esprf:///esdts_data/doc/;R.ProfileContext=PRF;R.SERVICEN
ME=&ServiceName=
```

If this menu is part of the ES-HDS service (filing plan), HDS must be included:

```
ShowPage?
Template=Search/frmSearchAndRecords.htm&CheckRight=false&DBName=esdts_data
&TableName=BDEMO&UseFM=yes
&ContextParams=R.ProfileURI=esprf:///esdts_data/pres/;R.ProfileContext=HDS;R.SERVICEN
AME=HDS&ServiceName=HDS
```



Reference

For information on customizing menus, please refer to the *EverSuite CORE Administration - Applications and data guide*.

5.2 MIRROR

Display groups of mirrors in the **CSMIRGROUP** table.

| Nom de la vue : Definition of groups of mirror stores | | | | |
|-------------------------------------------------------|-----|-------------|-------------|----------------------------------|
| Nombre de réponses : 2 (0 Élément(s) sélectionné(s)) | | Pages : | 1 | Nombre de résultats par page 100 |
| N° | Clé | MirrorGroup | MirrorStore | |
| 1 | 1 | Groupe1 | oss:///1/1/ | |
| 2 | 2 | Groupe2 | oss:///2/1/ | |

Figure 55 : List of mirror groups

5.3 SECURITY

The **Services > ES-PRF > Configuration > Administration > Security** menu allows you to define permissions, in particular for the application manager.

The window displayed gives access to roles or to users in order to configure the interface.

In the Choose actor section, Role is selected by default and the roles appear in a drop-down list. To select a user, you just check *User* and select the code for the user (here *caro*), so that the window looks like this:











| | |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>1. Choix du service</p> <p>prf Base de données dPortal</p> <p>2. Choix de l'acteur</p> <p>Type <input checked="" type="radio"/> Utilisateur <input type="radio"/> Rôle</p> <p>caro</p> <p>3. Affiner la configuration</p> <p>Base de données < select ></p> <p>Nom de la table < select ></p> <p>Clé de l'enregistrement</p> <p>SuppID</p> <p>4. Cliquez ici pour rétablir les droits</p> | <p>Gérer les droits</p> <p>  </p> <p>  es_right</p> <p> Profils</p> <p> Gestion des profils</p> <p> Gestion des dates de rétention</p> <p> Suppression de configurations</p> |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

Figure 56: Declaring rights on the ES-PRF service

A click on the  icon selects or unselects all rights.

A click on [4. Click to restore rights] restores the values set when the rights were last saved.

A click on  [Save] saves the rights declared.

The list of functions to which the user has access appears in the column on the right; only checked items will be available.

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