

Deployment of the Contract Management Solution Template

# Alfresco Workdesk



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# **Table of Contents**

Introduction	
About this document	
Intended audience	
Typographical conventions used in this guide	
Abbreviations	
Checklist	
Deployment of the Solution Template	4
Applying Alfresco Module Packages	4
Setting up the database	
Database for Alfresco Workdesk	
Database for Alfresco Office Workdesk	
Deploying Workdesk	!
Deploying Office Workdesk	
Deploying the ROOT application	
Deploying the _vti_bin application	
Deploying the officeworkdesk application	
Additional client side requirements	
Additional client side requirements	
How to continue	10

## Introduction

Besides collaboration centric document challenges there are a lot of process centric business challenges. The goals of automating these processes are increased process efficiency, cost savings, increased customer or employee satisfaction, and achievement of compliance. Many of the analysts also call this Transactional Content Management. Alfresco Workdesk is a purpose-built solution for process centric or transactional content processes.

Alfresco Workdesk helps you streamline document centric business processes and cases. With its business role management feature it provides every user group with the right documents in the right business context and in the right application, that can be created by simple configuration rather than coding. Since documents, processes and cases can be accessed via any standard web browser, from within most Office applications and from mobile devices, processes do not stop at the boundary of an enterprise and users are optimally supported in their way of working. Thus processes are accelerated dramatically and compliance is assured.

Alfresco Workdesk provides **faster time-to-value** because it offers state of the art ECM functionality out of the box and makes the creation of customer specific business applications as easy as possible. Productivity enhancing features like dynamic folders, views and actions, which are determined by the user's role in the process allow that the very same document can live in many different views. Hence, **Alfresco Workdesk** helps your organization to **process cases**, **deals**, **loans**, **claims faster and more efficiently**.

There are 3 modules of Workdesk offering the same functionality on different devices:

- · Alfresco Workdesk Robust features and flexibility on any web browser
- Alfresco Office Workdesk Bypass the browser with seamless desktop integration
- Alfresco Mobile Workdesk Mobilize your business processes on iPads and iPhones

All Alfresco Workdesk products can be adapted to work as unique solution for lots of typical business use cases. Examples are a Case Management solution to work on cases often known as Contract Management, Claims Handling solutions, Loan Origination solutions, Employee Hiring solution and many more. The focus of this document shall be on a Contract Management solution based on Alfresco Workdesk, but other Solution Template documents for other Alfresco Workdesk solutions will be published soon.

### About this document

This guide is the entry point for administrators that want to deploy the Contract Management Solution based on an Alfresco Workdesk.

### Intended audience

This document is intended for administrators who have to install and manage a vital Alfresco Workdesk solution environment.

You need basic skills to manage

- the underlying Alfresco system
  - deployment of custom data models
- Alfresco Workdesk
  - basic configuration

- assigning business roles to pages and functions
- the Activiti process engine
  - deployment of custom workflow definitions

Furthermore it is recommended (if you are system administrator) to have experience with:

- Application servers:
  - Deploying web applications (on common application servers, e.g. Apache Tomcat)
  - Classpath configurations
  - o Configuration of the libraries used by your web application
  - o log4j configuration, reading of log files
  - o xml
- JDBC connections
- Database knowledge (running SQL scripts)
- Web applications in general
  - In general you must have the authorization to modify and create resources.

# Typographical conventions used in this guide

Convention	Example
Important terms	Alfresco
Classes	OwAppContext
Methods	getName()
Source Code	public void myMethod(){}
// Comments in Source Code	simple source code comment
Java Package	com.wewebu.server.app
Plugins	com.wewebu.ow.server.plug.owdemo.owmain
Path	com/wewebu/ow/server/
XML Attribute	<node></node>
XML value	value
Product-specific terms	Add Document

#### Formatting legend for brackets in Source Code, Paths, File Names, and so on:

Ellipsis (...): Parameter the user must supply

Between brackets [...]: Optional items

Between braces {...}, choices separated by pipe |, example: {even|odd}: Set of choices from which the user must choose only one

#### The following placeholders are used in this document:

- (Alfresco) root directory of Alfresco installation
- (Tomcat) installation root of Tomcat application server
- (Workdesk) root directory of AWD deployment

# **Abbreviations**

AMP Alfresco Module Package

AWD Alfresco Workdesk

AOWD Alfresco Office Workdesk
AMWD Alfresco Mobile Workdesk

BPM Business Process Management

CMIS Content Management Interoperability Services

ECM Enterprise Content Management

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# Checklist

Prerequisites and checks for initial configuration
 □ Did you obtain valid licenses for Alfresco Workdesk and Alfresco Office Workdesk?

# Deployment of the Solution Template

The Solution Template comes delivered as an all-in-one ZIP file, but there are several tasks to be done to install the contained artifacts. This section will guide you through the necessary steps to deploy the Solution Template.

# Applying Alfresco Module Packages

Your Alfresco instance has to be prepared for the Solution Template, e.g. you have to make the data model used in the Solution Template available in Alfresco. Furthermore, the required folder structures, users,groups and the workflow API have to be setup. All these steps don't have to be performed manually, but can be executed automatically by just applying two Alfresco Module Packages (AMP) to your Alfresco instance. One AMP file can be found in the extracted Solution Template under amps/workdeskCMGSolutionTemplate and the other AMP file is located under libs/alfrescobpm.

- 1. Copy the AMP files to the folder (ALFRESCO\_INSTALL\_DIR) /amps. Make sure that you remove any older existing versions of this AMP files, so that the module exists only once.
- 2. Stop the Alfresco server.
- 3. Execute the batch file (ALFRESCO\_INSTALL\_DIR)/bin/apply\_amps.bat for Windows environments or (ALFRESCO\_INSTALL\_DIR)/bin/apply\_amps.sh for UNIX environments, which will then install all AMP files located in the (ALFRESCO\_INSTALL\_DIR)/amps folder.
- 4. Start the Alfresco server.

# Setting up the database

To be able to use and store some persistent application data, the Solution Template respectively Alfresco Workdesk and Alfresco Office Workdesk need to have access to a database and some prefilled tables. This section will guide you how to setup the required database and tables.

Note 1: We assume using PostgreSQL as database in this guide, but any other database supporting JDBC connections could be used. If you want to use any other database, please refer to the Installation Guide for Alfresco Workdesk and Alfresco Office Workdesk.

Note 2: You don't have to use a new stand-alone instance of PostgreSQL, i.e. if you have Alfresco installed and running, you can use the PostgreSQL instance of Alfresco also for persisting the Solution Template data.

#### Database for Alfresco Workdesk

- 1. Ensure that you have mapped (ALFRESCO\_INSTALL\_DIR) /postgresql/bin to your PATH environment variable.
- 2. If you work with Alfresco Workdesk for the first time, you don't have setup the required database and the tables yet. You can create the database and required tables automatically by executing a batch script: Copy all OwPostrgre\*.sql files from db/workdesk/scripts to db/workdesk/scripts/create\_postgres\_databases. If your PostgreSQL admin user password is not "admin" adopt the first line in the batch file create OWDDB.bat using a text editor and then execute the saved file.

- Alternatively you could use the SQL script <code>Create\_PostgreSQL\_Database.sql</code> in the same folder to create the database manually and then you could use all <code>OwPostrgre\*.sql</code> files to create the required tables manually.
- 3. Run the batch file insert\_ow\_role\_ConctractManagementUserRoles.bat located under db/contractmanagement in the extracted Solution Template to update the database table OW\_ROLE and set some required values, e.g. users and roles with their permissions available for Role Management in the Solution Template.
- 4. If required, adopt the JDBC connection settings (i.e. username, password and url) for the java:/PostgresSQLDS data source in context.xml located under bin/workdesk-cmg/META-INF to match the settings for your PostgreSQL installation.

#### Database for Alfresco Office Workdesk

- 1. Ensure that you have mapped (ALFRESCO\_INSTALL\_DIR) /postgresql/bin to your PATH environment variable.
- 2. If you work with Alfresco Office Workdesk for the first time, you don't have setup the required database and the tables yet. You can create the database and required tables automatically by executing a batch script: Copy all ZidiPostrgre\*.sql files from alfresco-office-workdesk/db/scripts to alfresco-office-workdesk/db/scripts/create\_postgres\_databases. If your PostgreSQL admin user password is not "admin" adopt the first line in the batch file create\_ZIDIDB.bat using a text editor and then execute the saved file.
  - Alternatively you could use the SQL script <code>Create\_PostgreSQL\_Database.sql</code> in the same folder to create the database manually and then you could use all <code>ZidiPostrgre\*.sql</code> files to create the required tables manually.
- 3. Run the batch file insert\_ZIDI\_ow\_role\_ConctractManagementUserRoles.bat located under db/contractmanagement in the extracted Solution Template to update the database table OW\_ROLE and set some required values, e.g. users and roles with their permissions available for Role Management.
- 4. If required, adopt the JDBC connection settings (i.e. username, password and url) for the java:/PostgresSQLDS data source in context.xml located under alfresco-office-workdesk/bin/officeworkdesk/META-INF to match the settings for your PostgreSQL installation.

# **Deploying Workdesk**

The Solution Template is mainly based on an Alfresco Workdesk web application, which is delivered preconfigured with all plugins, search templates and virtual folder structure definitions. This section will tell you how to deploy Alfresco Workdesk as part of the Solution Template.

Note 1: We assume using Apache Tomcat as application server in this guide. If you want to deploy Alfresco Workdesk on any other application server please refer to the Installation Guide.

Note 2: You don't have to use a stand-alone instance of Tomcat, i.e. if you have Alfresco deployed in a Tomcat, you can use the same Tomcat instance to deploy Workdesk.

1. In case, that your Alfresco instance is not reachable from the Workdesk application server via http://localhost:8080/alfresco, correct the URL values in the nodes

- <AtomPub>, <BPM> and <Authentication> of the file owbootstrap.xml located
  under bin/workdesk-cmg/WEB-INF/conf/contractmanagement.
- 2. Ensure that you have a Java Development Kit (JDK) installed and that your JAVA\_HOME environment variable is pointing to the root of this JDK installation.
- 3. In the extracted Solution Template you will find an exploded Workdesk web application folder workdesk-cmg under bin. Create a deployable web archive (WAR) file by running create\_workdesk-cmg\_war.bat for Windows environments or by running create\_workdesk-cmg\_war.sh for UNIX environments.
- 4. Stop your Apache Tomcat server.
- 5. Place the generated WAR file from step 3 in the Tomcat/webapps folder.
- 6. Start your Apache Tomcat server.
- 7. The WAR file will be deployed and the Workdesk application can be accessed after some seconds by calling <a href="http://server:port/workdesk-cmg">http://server:port/workdesk-cmg</a> in any browser, whereas you have to replace the server and port placeholders with the values from your environment.

## **Deploying Office Workdesk**

In order to be able to open documents directly in Microsoft Office from inside Workdesk, you have to install Alfresco Office Workdesk, which means deploying three web applications (ROOT, \_vti\_bin, officeworkdesk). You can find the preconfigured deployable Alfresco Office Workdesk artifacts under alfresco-office-workdesk in the delivered Solution Template.

Note 1: We assume using Apache Tomcat as application server in this guide. If you want to deploy Alfresco Office Workdesk on any other application server please refer to the Installation Guide.

Note 2: You don't have to use a stand-alone instance of Tomcat, i.e. if you have Alfresco deployed in a Tomcat, you can use the same Tomcat instance to deploy Office Workdesk.

# Deploying the ROOT application

- 1. Stop your Apache Tomcat server.
- 2. If you don't have an existing ROOT application in the Tomcat/webapps folder, continue with step 6.
- 3. If you have an existing ROOT application in the Tomcat/webapps folder, you need to adopt the existing application and you need to go through the following steps after you have created a backup of the existing ROOT application.
- 4. Copy the file \_vti\_inf.html from alfresco-office-workdesk/bin/ROOT to Tomcat/webapps/ROOT.
- 5. Copy the file index.jsp from alfresco-office-workdesk/bin/ROOT/ to Tomcat/webapps/ROOT and configure this page as welcome page of your ROOT application in the web.xml file of the application.
  - If you cannot replace an existing welcome page in your root application, you have to extend the existing welcome page to intercept the two requests OPTIONS / and PROPFIND / as handled in the delivered index.jsp file. You just need to copy anything above the <a href="https://exit.org/ncbi.nlm.ncbi.nl

tag in the delivered index.jsp file and insert it to the top of your existing welcome JSP page.

After you finished the modifications above please continue with step 9.

- 6. Ensure that you have a Java Development Kit (JDK) installed and that your JAVA\_HOME environment variable is pointing to the root of this JDK installation.
- 7. In the extracted Solution Template you will find an exploded ROOT web application folder ROOT under alfresco-office-workdesk/bin. Create a deployable web archive (WAR) file by running create\_ROOT\_war.bat for Windows environments or by running create ROOT war.sh for UNIX environments.
- 8. Place the generated WAR file from step 7 in the Tomcat/webapps folder.
- 9. Start your Apache Tomcat server.
- 10. To verify a correct ROOT application deployment, open the Microsoft Internet Explorer and navigate to the following URL:

```
http://server:port/ vti inf.html
```

The server should respond with an empty page. Right click in this page and select "view page source". You should find some FrontPage configuration information in HTML comments, that is, enclosed in "<!--" and "-->".

To verify a correct working index.jsp in the server root, call the URL of the server root context:

```
http://server:port
```

The server should respond with a Alfresco Office Workdesk welcome page. If you extended an existing application, you should see the welcome page of your root application.

# Deploying the \_vti\_bin application

- 1. Stop your Apache Tomcat server.
- 2. Ensure that you have a Java Development Kit (JDK) installed and that your JAVA\_HOME environment variable is pointing to the root of this JDK installation.
- 3. In the extracted Solution Template you will find an exploded \_vti\_bin web application folder \_vti\_bin under alfresco-office-workdesk/bin. Create a deployable web archive (WAR) file by running create \_\_vti\_bin\_war.bat for Windows environments or by running create \_vti\_bin\_war.sh for UNIX environments.
- 4. Place the generated WAR file from step 4 in the Tomcat/webapps folder.
- 5. Start your Apache Tomcat server.
- 6. To verify a correct \_vti\_bin application deployment, open the Microsoft Internet Explorer and navigate to the following URL:

http://server:port/ vti bin/webs.asmx

The server should respond with a page identifying the Alfresco Office Workdesk web service.

## Deploying the officeworkdesk application

- 1. Stop your Apache Tomcat server.
- 2. In case, that your Alfresco instance is not reachable from the application server via <a href="http://localhost:8080/alfresco">http://localhost:8080/alfresco</a>, correct the URL values in the nodes <AtomPub> and <Authentication> of the file owbootstrap.xml located under alfresco- office-workdesk/bin/officeworkdesk/WEB-INF/conf/contractmanagement.
- 3. Ensure that you have a Java Development Kit (JDK) installed and that your JAVA\_HOME environment variable is pointing to the root of this JDK installation.
- 4. In the extracted Solution Template you will find an exploded Office Workdesk web application folder officeworkdesk under alfresco-office-workdesk/bin. Create a deployable web archive (WAR) file by running create\_officeworkdesk\_war.bat for Windows environments or by running create\_officeworkdesk\_war.sh for UNIX environments.
- 5. Place the generated WAR file from step 3 in the Tomcat/webapps folder.
- 6. Start your Apache Tomcat server.
- 7. Verify your installation by opening the following URL in MS Internet Explorer:

http://server:port/officeworkdesk/debug.jsp

If you are able to "Open the Repository Browsing Service" verify the availability in MS Office Applications by trying to open a file in Word. Use a valid Alfresco account when challenged for authentication. Select "File – Open..." and enter:

http://server:port/officeworkdesk

as filename.

## Additional client side requirements

In order to be able to use Alfresco Office Workdesk there are several additional client side requirements, depending on the operating system you are using. Please see also the supported stacks under <a href="http://www.alfresco.com/services/subscription/supported-platforms">http://www.alfresco.com/services/subscription/supported-platforms</a>

#### Windows client requirements

Here is a short list of client side requirements when using Alfresco Office Workdesk on a Windows client:

- MS Office with Sharepoint services enabled
- Java Runtime Environment installed.
- Java applets enabled in browser.
- Executed registry files (delivered under alfresco-office-workdesk/RegistrationFiles) to use basic authentication for Alfresco Office Workdesk. See also the related basic authentication sections in the Alfresco Office Workdesk Installation Guide available through <a href="http://docs.alfresco.com">http://docs.alfresco.com</a>.

 The URL of Alfresco Office Workdesk must be added to the Trusted Sites in the Internet Explorer security settings.

#### Mac OS client requirements

Here is a short list of client side requirements when using Alfresco Office Workdesk on a Mac OS client:

- MS Office 2011
- Java Runtime Environment installed.
- Java applets enabled in browser.
- Enabled basic authentication for MS Office 2011 by executing the terminal command

defaults -currentHost write com.microsoft.registrationDB
hkey\_current\_user\\hkey\_local\_machine\\software\\microsoft\\o
ffice\\14.0\\common\\internet\\basicauthlevel -int
[Authentication]

The placeholder value for [Authentication] should be 1 or 2, depending on your environmental restrictions:

- 0 Basic authentication disabled (Default value!)
- 1 Basic authentication enabled for SSL connections only
- 2 Basic authentication enabled for SSL and for non-SSL connections
- Install the OfficeLauncherPlugin to open Alfresco Office Workdesk respectively MS Office from out of the most common Mac OS browsers (Chrome, Safari, Firefox). The required plugin installer file OfficeLauncherPlugIn.dmg and a short setup guide can be found in alfresco-office-workdesk/OfficeLauncherPlugin.

# How to continue

After having deployed the Contract Management Solution Template successfully, please refer to the *Workdesk Contract Management User Guide*, which will give in-depth details about the out-of-the-box scenario and the available user logins.