technology services group

OpenContent High Performance Interface 1.1.5 Core

Installation Guide

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Last Updated:
May 19, 2009

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Revision History:

Version	Date	Author	Description of Change
1.0	05/2009	Daphne Kao	New document

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1.0 Executive Summary

The OpenContent High Performance Interface (HPI) is an intuitive, fast, and highly configurable web application that provides users with a simple way to manage their inboxes, search and view content, and process their workloads. It uses OpenContent Web Services to communicate with a back-end content management system. This isolates the application from a specific version of content management software or database, allowing for painless upgrades.

The configurable and extensible framework of HPI enables scalability for all sizes of organizations as well as adaptable to custom business processes and changing requirements. A design focus on streamlining the interface and utilizing the latest in high-performance coding techniques ensures that each business user's time can be spent efficiently even in high-volume, transaction-based environments.

Key Features:

- **User Interface Flexibility** – Configurability allows one application to meet the needs of diverse departments and users.
- **Efficiency** – Decreases time to production, reduces testing and validation cycles, and ensures a smaller impact due to HPI's configuration features, as well as the ability to adapt to changing business requirements.
- **Minimize Upgrade Impact** – Use of web services isolates the application from upgrade impacts, thus reduces upgrade costs.
- **High User Productivity** – An intuitive interface requires less user training, in addition to improved output capacity and fewer user errors.

This document details how to install and configure HPI with the following components:

- **Dashboard** – Displays the Documentum Inobox items that the user is currently managing. The types of items available:
  - **Workflow tasks**
    The user can view his/her assigned workflow tasks.
  - **Notifications**
    The user can view his/her notification messages and delete them.

- **Search** – Exposes dynamic, advanced search functionality to enable the user to efficiently find content in the system.

- **New Folder** – Allows the user to create folders in the repository based on specific permissions and criteria.

- **Desktop** – Provides core content management features.
  - **Document and folder management**
    The user can upload content and view/maintain versions and properties.
  - **Notes**
    The user can add and view comments on the current folder.
  - **Dual-pane viewer**
    The user can view and compare documents side-by-side.

1.1 References

Document Name
Documentum Administrator Guide

Documentum Content Server Installation Guide
HPI 1.1.5 Build Guide
HPI 1.1.5 Configuration Guide
OpenContent 1.5 Installation Guide

2.0 System Requirements

Please review the following system requirements to eliminate issues during the installation, configuration, and operation of HPI.

2.1 Hardware Requirements

The following are the minimum hardware requirements for OpenContent HPI on both the application server and the client machines accessing the application.

2.1.1 Application Server

- 800 MHz processor (1.0 GHz recommended)
- 1.0 GB of RAM
- 600 MB of free disk space

2.1.2 Client Machine

- 800 MHz processor
- 128 MB of RAM
- 1024 x 768 resolution or higher
- 256 colors

2.2 Software Requirements

These supporting packages must be installed and functioning before HPI is installed. For instructions on properly configuring these packages, view the next section: Pre-Installation Tasks.

2.2.1 Documentum Content Server

See the Documentum Content Server Installation Guide and OpenContent 1.4 documentation.

2.2.2 OpenContent Application Server

See OpenContent 1.4 documentation.

2.2.3 OpenContent HPI Application Server

- Apache Tomcat 5.5 or higher
- BEA Weblogic 9.1 or higher
- JDK 1.5 or higher

2.2.4 Client Machine

- Internet Explorer 6.0 or higher
- Firefox 2 or higher
- JRE 1.5 or higher

3.0 Environment Preparation

Please review and execute the following tasks prior to installing HPI. Follow the instructions included with each product to ensure proper installation.

3.1 Install and Configure Documentum Content Server

3.1.1 Install Documentum Content Server

Install the content server according to the Documentum Content Server Installation Guide. The server can reside on any machine that is accessible by the application server running HPI.

3.1.2 Create a new repository

Use the Documentum Server Manager to create and configure a new repository.

3.1.3 Configure Inherit Permission Sets

The repository must be updated to inherit permission sets from folder. This can be done through Documentum Administrator as a super user. Please refer to the Documentum Administrator Guide.

3.2 Install and Configure OpenContent Application Environment

See installation guide for Documentum Content Server and OpenContent 1.4 documentation.

3.3 Install and Configure OpenContent HPI Application Environment

OpenContent HPI is a web application, which uses OpenContent to connect to and interface with the content server.

3.3.1 Install JDK

If HPI will be running on Apache Tomcat, JDK 5.0 (v 1.5.6) must be installed. The JDK can be downloaded from Sun Microsystems' website at http://java.sun.com.

3.3.2 Install and Configure the Web Application Server

HPI can run on BEA WebLogic 9.2 or higher, or Apache Tomcat 5.5.25 or higher. Please view Installing BEA WebLogic Platform at http://www.bea.com or view Tomcat Setup at http://jakarta.apache.org/tomcat accordingly.

4.0 Installing HPI

It is assumed that you have already deployed OpenContent successfully and have also obtained the HPI war file. Refer to the HPI 1.1.5 Build Guide to create a war file.

4.1 Deploy HPI

Deploying HPI to an application server will make the interface available to client machines. After deployment, please follow the OpenContent HPI configuration guide to tailor HPI to the current environment.

4.1.1 BEA WebLogic

Exploded Deployment:

1. Unzip the hpi.war file into the domain server directory of your instance of WebLogic.
    - This should create a directory similar to the following: $WL_DOMAIN_HOME/<server-name>/hpi
2. Open a web browser and navigate to the console application for the current WebLogic domain and login.
3. Open the Web Application Modules section.

4. Select “Deploy a new Web Application Module.”
5. Browse to the HPI root directory and select it.
6. Click “Target Module.”
7. Specify any desired settings.
8. Click “Deploy.”

Un-exploded Deployment:

1. Drop the war file on the web server
2. Open a web browser and navigate to the console application for the chosen WebLogic domain and login.
3. Open the Web Application Modules section.
4. Select “Deploy a new Web Application Module.”
5. Browse to the hpi.war file and select it.
6. Click “Target Module.”
7. Specify any desired settings.
8. Click “Deploy.”

If you are deploying as an un-exploded war file, please remember to unzip the “out of war” zip and set the correct path properties.

4.1.2 Apache Tomcat

1. Move the hpi.war file into the webapps directory of your instance of Apache Tomcat.
2. Start Tomcat using the startup.bat script found in the bin directory of the Tomcat installation.

The war file will be expanded in the webapps directory. Do not stop Tomcat while this task is in progress.

5.0 Configuring the HPI Environment

In order to run HPI, security and users must be set up through Documentum Administrator and the HPI configuration files. Any changes made to the configuration files will require a restart of the HPI application. Please refer to the HPI 1.1.5 Configuration Guide for detailed instructions on XML changes.

5.1 Documentum Groups

HPI security is based on active Documentum group accounts. Refer to Documentum’s Administration Guide to learn how to create a group in Documentum. The naming convention used should consist of a prefix and a suffix (for write groups). For example, a marketing group could be named tsg_marketing_write; the prefix is “tsg_” and the suffix is “_write.” The prefix will be used as an indicator that the group is created for use in HPI, while the suffix will be used as an indicator that the members will have write permissions. For HPI security configuration, refer to the HPI Configuration Guide.

5.2 Documentum Users

Users will log into HPI using their active Documentum user accounts. Refer to Documentum’s Administration Guide to learn how to create a user in Documentum.

5.3 Access Control List (ACL)

Once the Documentum group accounts have been set up for HPI, ACLs must be created for each folder path specified in the HPI configuration file. For folder path

configuration, refer to the HPI Configuration Guide. Refer to Documentum's Administration Guide to learn how to create ACLs.

5.4 Registered Tables

Picklists used in the HPI forms are set up in a configuration file. While values can be stored directly in the XML file, they can also be stored in a registered table. Refer to the Documentum documentation to learn how to create registered tables.

5.5 Service Host for OpenContent

If the correct service host name was not specified in the OpenContent properties file, extract the war and update the /WEB-INF/classes/OpenContent.properties file to specify the correct application server and port number for the variable *service.host*.

6.0 Uninstalling HPI

Uninstalling HPI requires removing the directories created by the install. No removal of registry keys is necessary. Refer to the OpenContent 1.4 Installation Guide to uninstall OpenContent.

6.1 Remove HPI

Following are the instructions for removing the HPI from BEA WebLogic and Apache Tomcat. Please refer to the product documentation for any further cleanup required.

6.1.1 BEA WebLogic

- Open a web browser and navigate to the console application for the chosen WebLogic domain and login.
- Open the Web Application Modules section.
- Click the trashcan to the right of the HPI.

6.1.2 Apache Tomcat

- Shutdown Tomcat.
- Navigate to Tomcat's webapps directory.
- Delete the hpi.war file.
- Restart Tomcat.

7.0 Troubleshooting

7.1 HPI errors on application server startup

- Check that all required libraries are on the classpath or path.
- Check that there are not duplicate libraries interfering with the required libraries on the classpath or path.

