Electronic Well File

Configuration and Deployment

**October, 2015**

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# Assumptions

The current deployment guide assumes that the following preliminary steps have been completed:

1. SharePoint 2013 Farm installation
2. Installation of SharePoint Reporting Services Server (integrated mode) and SharePoint Add-In on, as well as creation of Reporting Service Application. See Appendix for installation details.

# EWF Solution Configuration

## Database Configuration

Restore the EWF and EWFBIData databases to the target database server.

Create SQL login for use by the application as follows:

* Username: ewfuser
* Password: ewfpassword

Ensure that ewfuser can access EWF database and reference EWFBIData tables through synonyms defined on EWF database.

## Farm Configuration

Perform the following farm-level configuration steps:

1. From Central Administration
2. Define the EWF Term Store
   1. From Central Administration, select the Application Management | Manage Service Applications.
   2. Select Managed Metadata Service Application and then the ‘Manage’ menu option.
   3. Set EWF Support as the Term Store Administrators.
   4. Create the ‘EWF’ group.
   5. Import the ‘Comment Category’ term set using the EWF TermStore - Comment Category.csv file.
   6. Import the ‘Document Subtype’ term set using the EWF TermStore – Document Subtype.csv file.
   7. Import the ‘Operator’ term set using the EWF TermStore – Operator.csv file.
   8. Import the ‘Partner’ term set using the EWF TermStore – Partner.csv file.
   9. Import the ‘Vendor’ term set using the EWF TermStore – Vendor.csv file.
   10. Set the EWF Support as the owner of all term sets.
   11. Set the ‘Operator’, ‘Partner’ and ‘Vendor’ terms sets as Open term sets.
3. Copy Bonavista.EWF.SharePoint.wsp and Bonavista.EWF.TimerJobs.wsp solution file to folder containing SharePoint deployment scripts.
4. For now run InstallEWF.ps1 and InstallEWFTimerJovSoln.ps1 powershell script to deploy the farm solutions.
5. Go to Site Settings | Site Collection features. Activate all custom Bonavista.EWF.\* features if these are not already activated.
6. Enable crawling for search:
   1. From Central Administration, select the Application Management | Manage Service Applications.
   2. Select Search Service Application and then the ‘Manage’ menu option.
   3. Select Content Sources | Local SharePoint Sites.
   4. Perform a full crawl. This may take a while to complete.
   5. Enable ‘Continuous Crawling’.
   6. Save changes.

## Web Application Configuration

Update the web.config file for Web Application hosting the EWF Solution. This file is usually located under C:\inetpub\wwwroot\wss\VirtualDirectories\<Web App>. Please be sure to make a back-up before editing.

1. Ensure that <modules> node contains entry for Session state module :

<modules runAllManagedModulesForAllRequests="true">

…

<add name="SessionState"

type="System.Web.SessionState.SessionStateModule" />

…

</modules>

1. Set enableSessionState to true:

<pages enableSessionState="true ..>

1. Ensure that customErrors is off:

<customErrors mode="Off" />

1. Ensure CallStack is enabled (set to True)

<SafeMode MaxControls="200" CallStack="True" DirectFileDependencies="10" TotalFileDependencies="250" AllowPageLevelTrace="false">

1. Comment out out-of-the-box <appSettings> node (if defined)

<!-- appSettings section moved to the end of the file to add entries for EWF

configuration -->

<!--appSettings>

<add key="aspnet:RestrictXmlControls" value="true" />

<add key="FeedCacheTime" value="300" />

<add key="FeedPageUrl" value="/\_layouts/15/feed.aspx?" />

<add key="FeedXsl1" value="/Style Library/Xsl Style Sheets/Rss.xsl" />

<add key="ReportViewerMessages"

value="Microsoft.SharePoint.Portal.Analytics.UI.ReportViewerMessages,

Microsoft.SharePoint.Portal, Version=15.0.0.0, Culture=neutral,

PublicKeyToken=71e9bce111e9429c" />

<add key="aspnet:AllowAnonymousImpersonation" value="true" />

</appSettings-->

1. Add EWF-specific settings at the end of the web.config file, just above the closing </configuation> tag. Adjust settings as needed for target environment:

<!-- EWF Configuration -->

<connectionStrings>

<add name="EWFConnectionString"

connectionString="Data Source=<servername>;Initial Catalog=EWF;

User ID=ewfuser;Password=ewfpassword"

providerName="System.Data.SqlClient" />

</connectionStrings>

<appSettings>

<add key="aspnet:RestrictXmlControls" value="true" />

<add key="FeedCacheTime" value="300" />

<add key="FeedPageUrl" value="/\_layouts/15/feed.aspx?" />

<add key="FeedXsl1" value="/Style Library/Xsl Style Sheets/Rss.xsl" />

<add key="ReportViewerMessages"

value="Microsoft.SharePoint.Portal.Analytics.UI.ReportViewerMessages,

Microsoft.SharePoint.Portal, Version=15.0.0.0, Culture=neutral,

PublicKeyToken=71e9bce111e9429c" />

<add key="aspnet:AllowAnonymousImpersonation" value="true" />

<add key="EWFDistrictImagePath" value="/\_layouts/15/images/Bonavista.EWF.SharePoint/sharepointfoundation16.png" />

<add key="EWFAreaImagePath" value="/\_layouts/15/images/Bonavista.EWF.SharePoint/area\_small.gif" />

<add key="EWFFacilityImagePath" value="/\_layouts/15/images/Bonavista.EWF.SharePoint/sitevariation.gif" />

<add key="EWFHomeButtonImageURL" value="/\_layouts/15/images/Bonavista.EWF.SharePoint/home.png" />

<add key="EWFHardCodedSiteName" value="wellSite" />

<add key="EWFSupportGroupEmail" value="records@bonavistaenergy.com" />

<add key="EWFIssueEmailSubject" value="Issue related to well " />

<add key="EWFCommentsListName" value="Well Comments" />

<add key="EWFOwnersGroupName" value="EWF Owners" />

<add key="EWFVisitorsGroupName" value="EWF Visitors" />

<add key="EWFITSupportGroupName" value="EWF IT Support" />

<add key="EWFContributeNoDeletePermissionName" value="Contribute No Delete" />

<add key="EWFITSupportPermissionName" value="IT Support" />

<add key="EWFTeamInfoListURLPattern" value="http://intranet/production/\_layouts/listform.aspx?PageType=4&amp;ListId={E173F5DC-5B73-4D78-88B5-B368AE755DAC}&amp;ID={0}" />

<add key="EWFTeamInfoHeight" value="640" />

<add key="EWFTeamInfoWidth" value="320" />

<add key="EWFSiteTemplate" value="WellboreSiteTemplate" />

<add key="FeatureGUIDs" value="94c94ca6-b32f-4da9-a9e3-1f3d343d7ecb" />

<add key="EWFWellDocumentsLibraryName" value="Well Documents" />

</appSettings>

## Site Collection / Top Level Site Configuration

For the most part, the following steps should be done at the top-level site for the site collection where the EWF solution. Additionally, some collection features also need to be activated.

### Enable Publishing Features

Publishing features need to be enabled to use a custom master page.

On the top-level site of the site collection:

1. Go to Site Settings | Site Collection Administration | Site Collection Features
2. Activate SharePoint Server Publishing Infrastructure feature
3. Go to Site Settings | Site Actions | Manage Site Features
4. Activate SharePoint Server Publishing feature

### Create ‘Contribute No Delete’ Permission Level

On the top-level site of the site collection:

1. Go to Site Settings | Permissions
2. Select Permission Levels
3. Select the Contribute Permission Level
4. Click the Copy Permission Level button in the bottom of the page.
5. Enter the following information to create the new permission level:
   1. Name: Contribute No Delete
   2. Description: Can view, add and update list items and documents.
   3. Uncheck Delete Items and Delete Versions.

### Create ‘IT Support’ Permission Level

Follow instructions in previous section to create the ‘IT Support’ permission level based on the ‘Full Control’ permission level.

In the initial rollout, the ‘IT Support’ permission level will have ‘Full Support’ access, but that may be changed at a later date.

### Grant Permissions

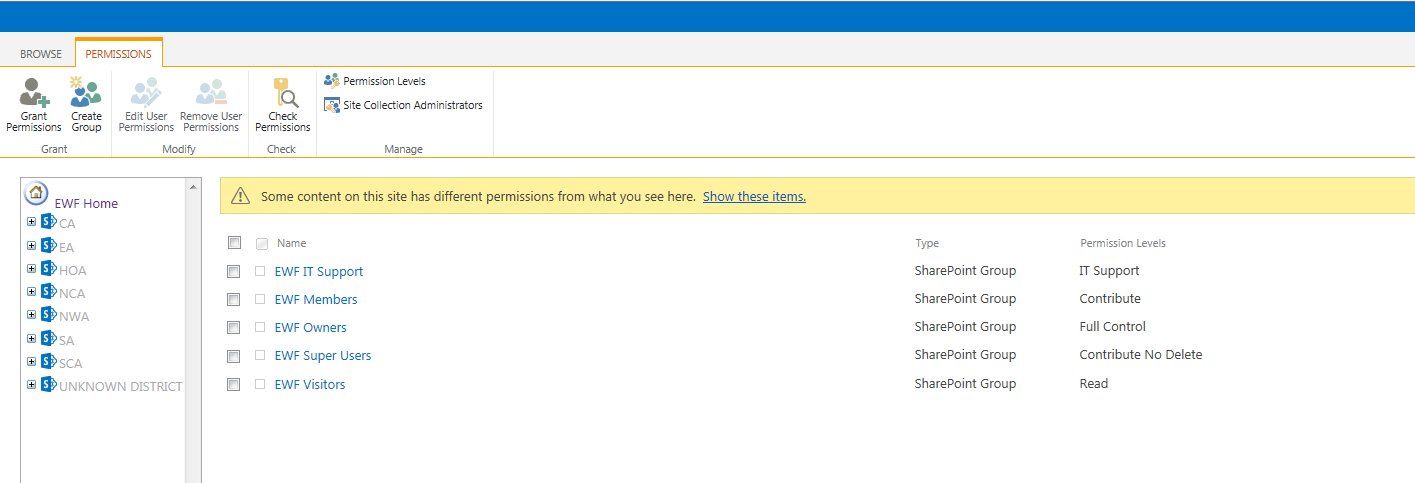
On the top-level site of the site collection:

1. Go to Site Settings | Permissions
2. Remove all permissions for associated groups and users, with the exception of Members, Owners and Visitors.
3. Make sure remaining groups are called EWF Members, EWF Owners and EWF Visitors. Rename and/or add groups if needed. To rename: select group and then select ‘Settings’ option.
   1. Make EWF Owners the owner of each group
4. Create EWF IT Support group.
5. Set members and permission levels for SharePoint groups according to the following table:

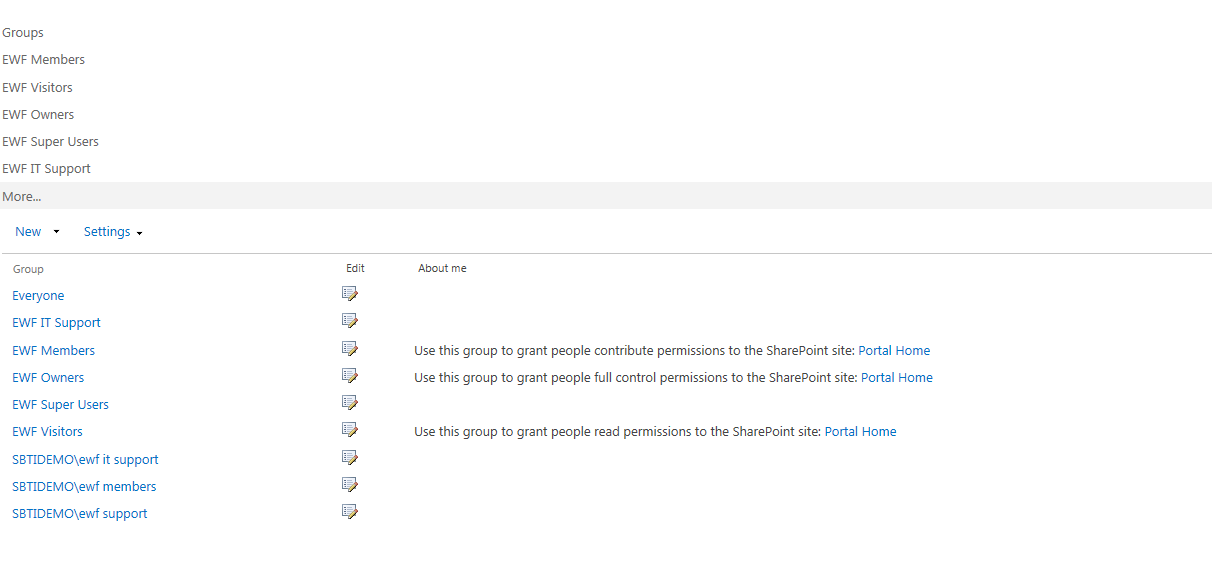
|  |  |  |  |
| --- | --- | --- | --- |
| SharePoint Group | Active Directory  Member Group |  | Permission  Level |
| EWF Owners | EWF Owners |  | Full Control |
| EWF Members | EWF Members |  | Contribute |
| EWF Super Users | EWF Super Users |  | Contribute No Delete |
| EWF IT Support | EWF IT Support |  | IT Support |
| EWF Visitors | Everyone |  | Read |

1. Remove any additional group that may be have been added to the site collection while performing the previous configuration steps.
2. Go to Site Settings | Site Collection Administrators
   1. Set Site Collection Administrators to EWF Support

Final site collection / top-level site permissions should look as follows:



Final site collection / top-level site users / groups should look as follows (it may not be possible to remove AD groups):



### Configure Production Report

On the top-level site of the site collection:

1. Next create one SharePoint document libraries: Report Contents.
2. In the library settings for the Report Contents library, go to advanced setting and change ‘Allow Management of content types to ‘Yes’.
3. Add from existing content types and in ‘SQL Server Reporting Service’ content type group select Report Builder Report and Report Builder Model, Report Data Source content types as shown below. Delete the Document content type and set Report Builder Report as a default content type.
4. Upload the Report data sources and Reports.
5. Now Update web.config file on web server with the following key in the AppSettings section (update the link to match the URL for current environment):

<add key="EWFSSRSReportURL" value="http://sp13/sites/ewf/\_vti\_bin/reportserver?http://sp13/sites/ewf/Report%20Contents/LiquidGasVolume\_1.rdl&amp;rc:Parameters=false&amp;wbid=" />

### Back-Scan Compliance Library

On the top-level site of the site collection:

1. Go to Site Contents
2. Add Back-Scan Compliance Document Library (App):
3. Go to Library Settings | Library Permissions
   1. Stop Inheritance
   2. Grant the following access:
      1. EWF Owners: Full Control
      2. EWF Members: Read

### Electronic Well File Solution Home Page

Create a separate site for search (e.g. http://<server/alias>/Search):

1. Go to Site Settings | Site collection features
   1. Activate Bonavista.EWF.SharePoint.WebParts feature
2. Go to Site Settings | Web Parts gallery
3. Edit the properties of the Bonavisat.WF.SharePoint\_HomeAndBack web part
   1. Associate to custom group ‘EWF’
4. Go to Site Settings | Look and Feel
   1. Select ‘Title, description, and logo’
   2. Select the Bonavista logo from the 15 hive C:\...\Microsoft Shared\Web Server Extensions\15\TEMPLATE\IMAGES\Bonavista.EWF.SharePoint (this is the file used by the solution).

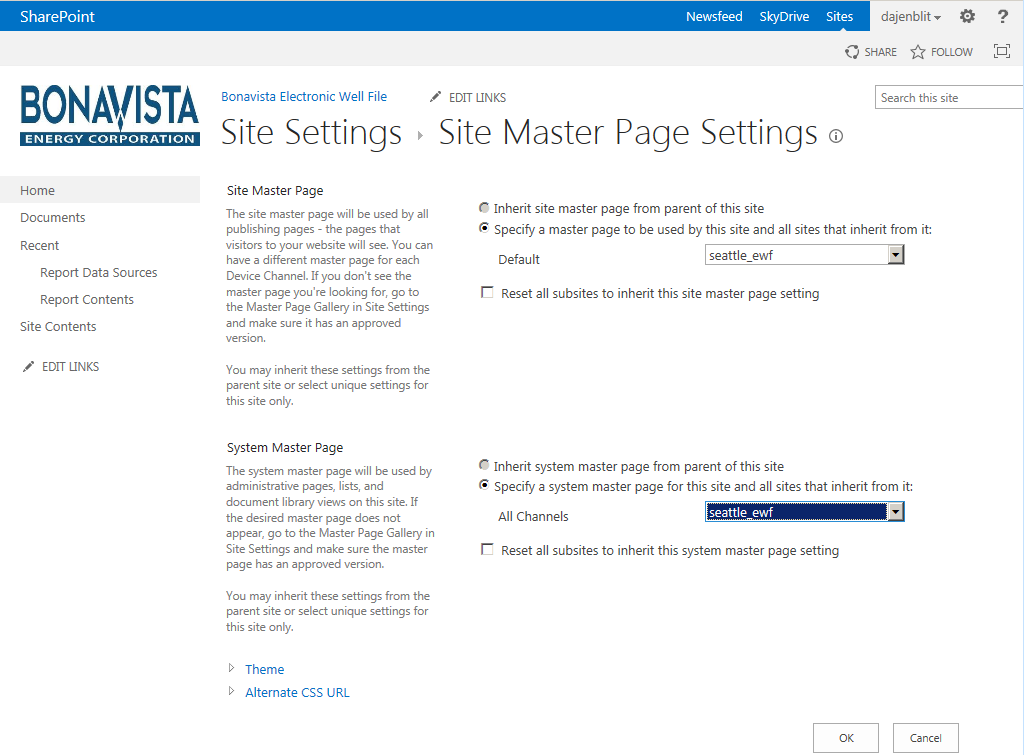
On the top-level site of the site collection (Search Site Collection if different than EWF, otherwise EWF):

1. Go to Site Settings | Web Parts gallery
2. Edit the properties of the Bonavisat.WF.SharePoint\_HomeAndBack web part
   1. Associate to custom group ‘EWF’
3. Go to Site Contents | Site Pages
4. Edit the properties of Home.aspx page
   1. Rename to EWFHome.aspx
   2. Save changes.
5. Search for any key word on Out of the box SharePoint search box
6. Copy the Url of the search result page without the query string.
7. Remove all web parts in the home page (EWFHome.aspx)
8. Change layout to single column
9. Insert a Search Box Web Part from Search web part category.
10. Edit the Search Box web part and expand ‘Which search results page should queries be sent to?’ on the search box edit window.
    1. Select the ‘Send queries to a custom results page URL’ radio button and paste the URL that is copied in step 2.
11. Expand Appearance on the edit window
    1. Set the title to ‘Document Search’ and Chrome Type to ‘Title Only’
12. Save changes to web part.
13. Save changes to page.
14. Exit edit mode.
15. Search for any key word on the new Search box web part
16. Edit the results page
    1. Insert Home and Back (custom) web part from EWF web part category just below the Search box and search navigation links.
17. Check in the changes. Publish the page.
18. If Search is on a different site collection, on the results page, click the logo to go to the Search Center home page. Edit the page
    1. From EWF group insert the Home and Back web part under the Search Box web part
    2. Check in and publish the page
19. Edit EWFHome.aspx
    1. Insert Well Search Web part from EWF group in Web Part gallery.
    2. Save changes.

### Set Custom Master Page

On the top-level site of the site collection:

1. Go to Site Settings | Look and Feel | Master Page
2. Select seattle\_ewf page as the Site and System master page.



## Additional Branding Settings

These steps are required to achieve a branding effect that is similar to the layout of the Bonavista Intranet site.

1. Using SharePoint Designer, manually import the ewf.css file into the Style Library.

This is located in: …TEMPLATE\LAYOUTS\1033\STYLES\Themable\ewf.css

In Designer, the Style Library is located in: All Files\Style Library\en-us\Themable\Core Styles

1. Using the right-click ‘Check-In’ menu option to publish a “major version” of ewf.css.

## Create Site Template

Several attempts were made during the development phase to define a ‘portable’ site template that could be used on different environments without success: some of the settings were not preserved and incorporating the items of the site template resulted in errors when the template was used in an environment / server different than the one used to create the template.

As a result, a Starter Template to contain ‘portable’ template elements and final adjustment will need to be specifically created for each environment:

1. Add WellboreSiteTemplate.wsp file to the Solutions gallery of the Site Collection (top-level site).
2. Create Wellbore site (with using ‘wellbore’ for URL) under the site collection based on the WellboreSiteStarter template.
3. Stop inheriting Edit the permissions for the Well Comments list on the Wellbore site. Include only the following two entries:
   1. Full Control for EWF Owners
   2. Contribute No Delete for EWF Visitors
4. Edit the Home page for the Wellbore site:
   1. Insert Well Header web part at the top of the page.
   2. Insert SSRS Web Part
      1. Set report data source as LiquidGasVolume\_1.rdl from the Report Contents library in the parent site. NOTE: If script errors occur when selecting the report from the Report Contents library, manually type the report path and name - /Report Contents/LiquidGasVolume\_1.rdl.
      2. Set title as ‘Production Graph’
      3. Under ‘View’ configuration section, elect to only display export/print menu and hide parameter and document map areas
   3. Insert Query String Filter web part:
      1. Add WBID as parameter
      2. Connect to Report web part
5. Save the Wellbore site as WellboreSiteTemplate site template

At this point, the SiteTemplate solution should be deleted (or at least de-activated) so that there is only one custom site template defined.

Note: If no WellboreSiteStarterTemplate is available, then create Wellbore site as a team site and manually create Well Documents and Back Scan Compliance libraries and Well Comments list.

## Admin Site

The Admin Site provides access to creating new wellbore sites. Additional functionality may be incorporated into this site at a later phase. From the top-level site:

1. Go to Site Contents
2. Click ‘New subsite’ link
   1. Set name to Administration
   2. Set URL to admin
   3. Choose Team Site Template

From the newly created admin site:

1. Go to Site Settings | Permissions
   1. Choose to ‘Stop Inheriting Permissions’
   2. Choose to use existing Visitors, Members and Owner groups
2. Go to Site Settings | Permissions
   1. Remove access for all groups but EWF Owners
3. Edit the Home page:
   1. Remove all web parts
   2. Change layout to one column
   3. Insert New Site Approver web part
4. Go to Site Settings | Site Actions | Manage Site Features
   1. Activate SharePoint Server Publishing Feature
5. Go to Site Settings | Look and Feel | Master Page Settings
   1. Select seattle\_ewf as the Site Master Page
   2. Select seattle\_ewf as the System Master Page

# Timer Job Configuration

1. Update OWSTIMER.EXE.config file on web and app servers with the following sections after updating the config file on both servers restart SharePoint Timer Services on both services:

<connectionStrings>

<add name="EWFConnectionString" connectionString="Data Source=<server name>;Initial Catalog=EWF; User ID=ewfuser;Password=ewfpassword" providerName="System.Data.SqlClient" />

</connectionStrings>

<appSettings>

<add key="EWFSiteCollectionURL" value="**<URL for Solution>**" />

<add key="EWFSiteTemplate" value="WellboreSiteTemplate" />

<add key="FeatureGUIDs" value="94c94ca6-b32f-4da9-a9e3-1f3d343d7ecb" />

<add key="EWFWellDocumentsLibraryName" value="Well Documents" />

<add key="EWFCommentsListName" value="Well Comments" />

<add key="EWFITSupportGroupName" value="EWF IT Support" />

<add key="EWFOwnersGroupName" value="EWF Owners" />

<add key="EWFVisitorsGroupName" value="EWF Visitors" />

<add key="EWFITSupportPermissionName" value="IT Support" />

<add key="EWFMembersGroupName" value="EWF Members" />

<add key="EWFContributeNoDeletePermissionName" value="Contribute No Delete" />

<add key="EWFSpecialUseSites" value="Wellbore;ewfsearch"/>

<add key="EWFSMTPServer" value="mail.bonavista.local" />

<add key="EWFSendSiteProvisioningNotifications" value="1" />

<add key="EWFSendSiteDeletionNotifications" value="1" />

<add key="EWFSendPendingSitesNotifications" value="1" />

<add key="EWFSiteProvisioningEmailFromAddress" value="**<email address>**" />

<add key="EWFSiteProvisioningErrorGroup" value="**<email address>**" />

<add key="EWFSiteProvisioningInfoGroup" value="**<email address>**" />

<add key="EWFPendingSiteEmailToAddress" value="**<email address>**" />

<add key="EWFPendingSiteEmailSubject" value="New wellbores ready for approval as EWF sites" />

<add key="EWFPendingSiteEmailBody" value="The following new wellbores are ready for approval as EWF sites:" />

<add key="EWFCreatedSitesEmailToAddress" value="**<email address>**" />

<add key="EWFCreatedSitesEmailSubject" value="New EWF well sites created" />

<add key="EWFCreatedSitesEmailBody" value="EWF well sites failed during creation:" />

<add key="EWFSendSiteDeletionNotifications" value="1" />

<add key="EWFFailedToCreateSitesEmailToAddress" value="ewfsiteprovision\_error@bonavistaenergy.com" />

<add key="EWFFailedToCreateSitesEmailSubject" value="New EWF well sites failed during creation" />

<add key="EWFFailedToCreateSitesEmailBody" value="The following EWF well sites failed during creation:" />

<add key="EWFDeletedSitesEmailToAddress" value="**<email address>**" />

<add key="EWFDeletedSitesEmailSubject" value="EWF well sites deleted" />

<add key="EWFDeletedSitesEmailBody" value="The following EWF well sites were deleted:" />

<add key="EWFFailedToDeleteSitesEmailToAddress" value="ewfsiteprovision\_error@bonavistaenergy.com" />

<add key="EWFFailedToDeleteSitesEmailSubject" value="EWF well sites failed during deletion" />

<add key="EWFFailedToDeleteSitesEmailBody" value="The following EWF well sites failed during deletion:" />

<add key="EWFDocumentCountSuccessNotification" value="1" />

<add key="EWFDocumentCountErrorNotification" value="1" />

<add key="EWFDocumentCountEmailFromAddress" value="**<email address>**" />

<add key="EWFDocumentCountEmailToAddress" value="**<email address>**" />

<add key="EWFDocumentCountEmailSubject" value="Document Count Timer Job" />

<add key="EWFDocumentCountEmailBody" value="Refer to the MessageLog table for additional information." />

</appSettings>

Please note that it is not necessary to enable e-mail notification. If this is not required, the following settings to 0:

<add key="EWFSendSiteProvisioningNotifications" value="0" />

<add key="EWFSendSiteDeletionNotifications" value="0" />

<add key="EWFSendPendingSitesNotifications" value="0" />

<add key="EWFDocumentCountSuccessNotification" value="0" />

<add key="EWFDocumentCountErrorNotification" value="0" />

## Create Timer Jobs

Go to Central Administration:

1. Go to Application Management | Manage Web Applications
2. Select EWF / Portal Web Application
3. Select Manage Features
4. Activate Bonavista.EWF.SharePoint.TimerJobs feature
5. Go to Monitoring | View Job definitions
6. Filter jobs for EWF Web Application
7. Ensure that Document Count and Site Provisioning timer jobs are listed.
8. Adjust schedule for jobs (if needed).

## Site Provisioning Actions

Once the timer job is activated, the following actions should be performed.

1. Validate site functionality (wellbore search, wellbore sites, library and comments)
2. Open EWF database in SQL and copy dbo.WellboreSite WBID info to dbo.PendingWellboreSite with the status of **Approved**.

USE [EWF]

GO

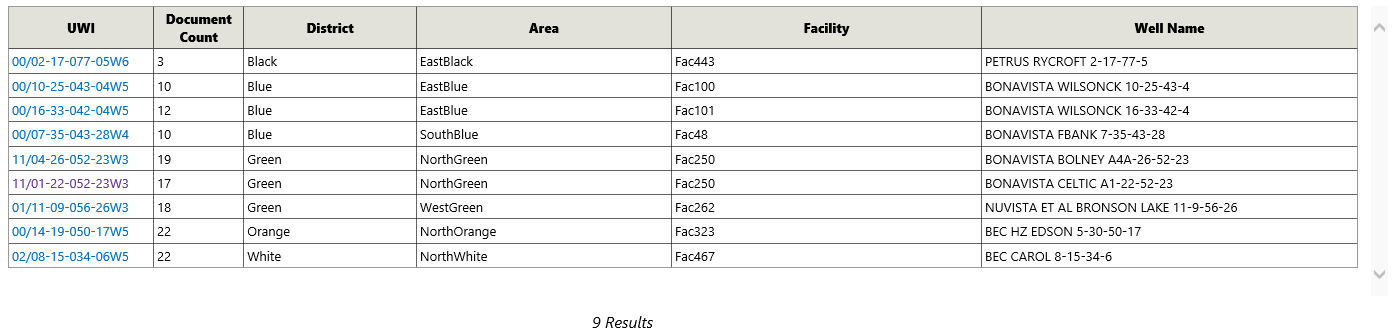
INSERT INTO dbo.PendingWellboreSite (WBID, PendingWellboreSiteStatus)

SELECT WBID

FROM DBO.WellboreSite

SET PendingWellboreSiteStatus = 'Approved'

1. Once Copied **remove** all the entries from dbo.WellboreSite
2. Run the Site Provisioning Timer job manually (the timer job approximately takes 2hours to finish)
   1. On Central Admin, go to Monitoring | Timer Jobs “ Review job definitions
   2. Select Bonavista EWF – Site Provisioning Timer Job
   3. Click “Run Now” button. The MessageLog table can be checked to ensure that the job was started.
3. Once the timer job has finished running; copy the following site well documents to the associated demo site well documents library



1. After uploading all the documents with associated demo site > Run Document Count timer job manually:
   1. On Central Admin, go to Monitoring | Timer Jobs “ Review job definitions
   2. Select Bonavista EWF – Document Count Timer Job
   3. Click “Run Now” button. The MessageLog table can be checked to ensure that the job was started.