

## AD30 – Management of the RMS Application

### **I. Purpose:**

This document captures information provided by Ovitass on 8 June 2012.

#### **WARNING!!!**

- Some of this information may be dated.
- Except for the few indicated (#1, 2, 3), the outlined procedures have NEVER been tested by LBNL personnel (neither IT nor RM PM).
- Attempting to do this without Ovitass is very high risk and jeopardizes the RMS Application.
- This document is reference only for persons not trained by Ovitass.

### **II. Who can do these procedures:**

Only Ovitass engineers or LBNL IT personnel who are fully qualified in the Ovitass/RMS application and/or server system architecture can execute these procedures.

Notes:

- As of December, 2014, **no** LBNL IT engineer is trained on the RMS application nor on the Ovitass Workpoint Designer (referenced in this procedure).
- LBNL-IT **does** support the servers and server architecture where the RMS application and the data reside.

### **III. RMS Database Management Topics**

#### **1. List of users by role.**

- a. Ovitass can do this.
- b. Ovitass supplied us with a SQL generator. M. Kremer (LBNL-IT Business) applied it successfully. See Appendix A of this document for details.
- c. An outstanding feature request (Issues Tracking #214) is enabling a RMS administrator to download the list of user roles.

#### **2. LDAP updates (also known as “people-picker” and “data warehouse”)**

- a. On Production RMS, Ovitass established the set up for LDAP information to be updated automatically and daily (approximately midnight).
- b. On QA RMS and Development RMS, LDAP information is out of date. QA was last updated approximately 2013; Dev was updated approximately Aug, 2014. LBNL IT-Business Systems may know how to do this. Ask for their assistance first, then ask Ovitass for help.
- c. Appendix B cites some historical correspondence on this topic.

### 3. CMIS server: start/stop and general support info

[LBNL IT-Business Systems know how to do manage this. *Note: the exact details displayed below were taken approximately January, 2012 and may have since changed.*]

This requires access to the Linux Server.

To see if the CMIS Tomcat server is running; execute the following command:

```
[ovitas@lbl-app-dev2 test-importer]$ ps -ef | grep tomcat
ovitas  11400  7845  0 11:43 pts/1    00:00:00 grep tomcat
ovitas  27917      1  0 Jun19 ?        00:02:51 /usr/java/jdk1.6.0_16/bin/java -
-Djava.util.logging.config.file=/opt/apache-tomcat-7.0.22/conf/logging.properties -
-Djava.util.logging.manager=org.apache.juli.ClassLoaderLogManager -
-Djava.endorsed.dirs=/opt/apache-tomcat-7.0.22/endorsed -classpath /opt/apache-
tomcat-7.0.22/bin/bootstrap.jar:/opt/apache-tomcat-7.0.22/bin/tomcat-juli.jar -
Dcatalina.base=/opt/apache-tomcat-7.0.22 -Dcatalina.home=/opt/apache-tomcat-7.0.22
-Djava.io.tmpdir=/opt/apache-tomcat-7.0.22/temp
org.apache.catalina.startup.Bootstrap start
```

If the CMIS Tomcat server is running you will see the java process that is the CMIS Tomcat server.

If that java process is missing, the server is not running.

To start the CMIS Server, execute the following command:

```
[ovitas@lbl-app-dev2 bin]$ /opt/apache-tomcat-7.0.22/bin/shutdown.sh
Using CATALINA_BASE:   /opt/apache-tomcat-7.0.22
Using CATALINA_HOME:   /opt/apache-tomcat-7.0.22
Using CATALINA_TMPDIR: /opt/apache-tomcat-7.0.22/temp
Using JRE_HOME:        /usr/java/jdk1.6.0_16
Using CLASSPATH:       /opt/apache-tomcat-7.0.22/bin/bootstrap.jar:/opt/apache-
tomcat-7.0.22/bin/tomcat-juli.jar
```

To stop the CMIS Server, execute the following command:

```
[ovitas@lbl-app-dev2 bin]$ /opt/apache-tomcat-7.0.22/bin/startup.sh
Using CATALINA_BASE:   /opt/apache-tomcat-7.0.22
Using CATALINA_HOME:   /opt/apache-tomcat-7.0.22
Using CATALINA_TMPDIR: /opt/apache-tomcat-7.0.22/temp
Using JRE_HOME:        /usr/java/jdk1.6.0_16
Using CLASSPATH:       /opt/apache-tomcat-7.0.22/bin/bootstrap.jar:/opt/apache-
tomcat-7.0.22/bin/tomcat-juli.jar
```

### 4. What are the Admin rights? – Can Admin override to close out items?

Admins cannot take over workflow tasks that are currently assigned to other users. The user that “opens” a workflow task becomes assigned to that task. Only that user can work on that task unless that user makes it available for other users by using that “Make Available” button. Alternatively, that user can assign the tasks to another user with the “Reassign Task” button.

*[12/2014 LJY comment: this means that any person who is leaving the Laboratory or is no longer in a RMC role MUST either re-assign or make available before he/she leave the role. Otherwise, Ovitass can help move workflows to the RM PM’s Inbox.]*

5. How to manage turn on of email notifications

This requires the Workpoint Designer. Request Ovitass assistance.

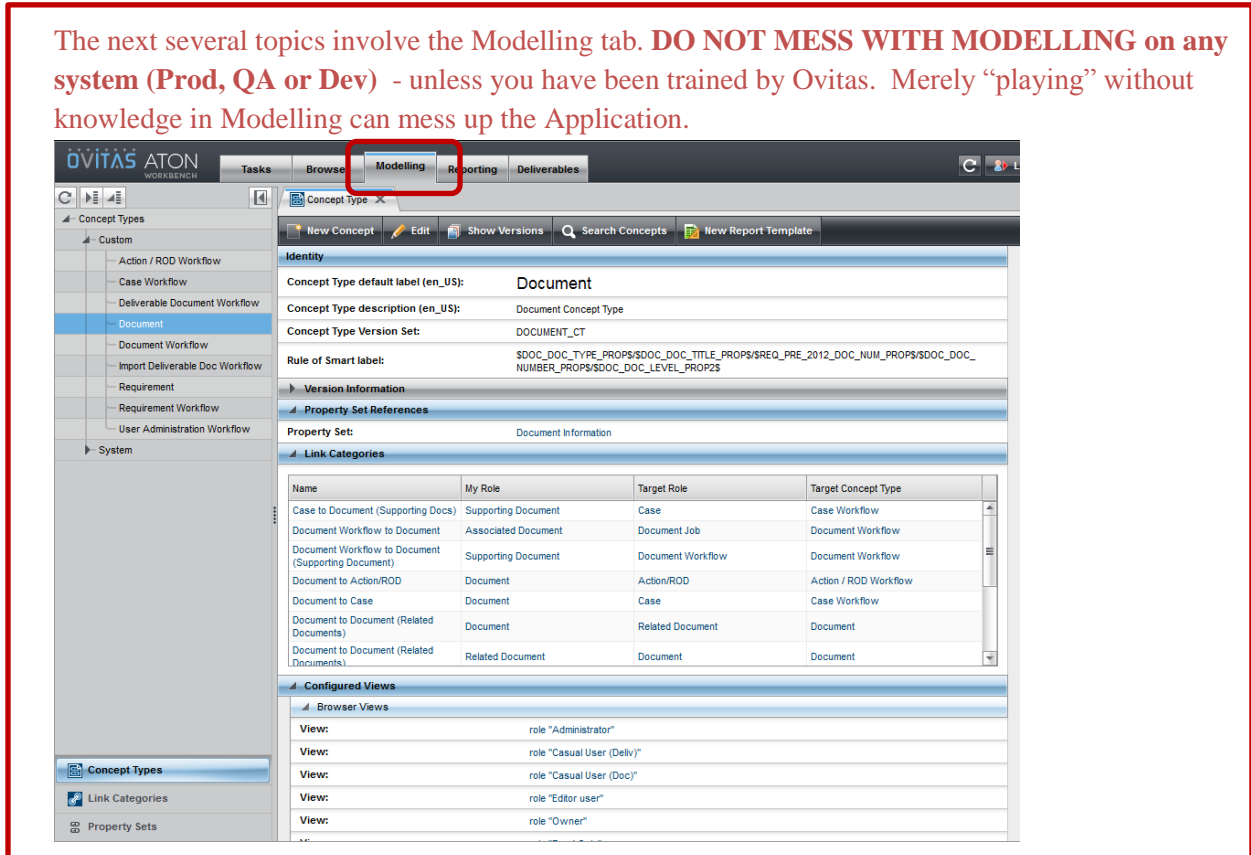
6. How to modify wording in an alert

This requires the Workpoint Designer. Request Ovitass assistance.

7. Workflow engine (Workpoint) – how to reset or stop workflows

This requires the Workpoint Designer. Request Ovitass assistance.

The next several topics involve the Modelling tab. **DO NOT MESS WITH MODELLING on any system (Prod, QA or Dev) - unless you have been trained by Ovitass.** Merely “playing” without knowledge in Modelling can mess up the Application.



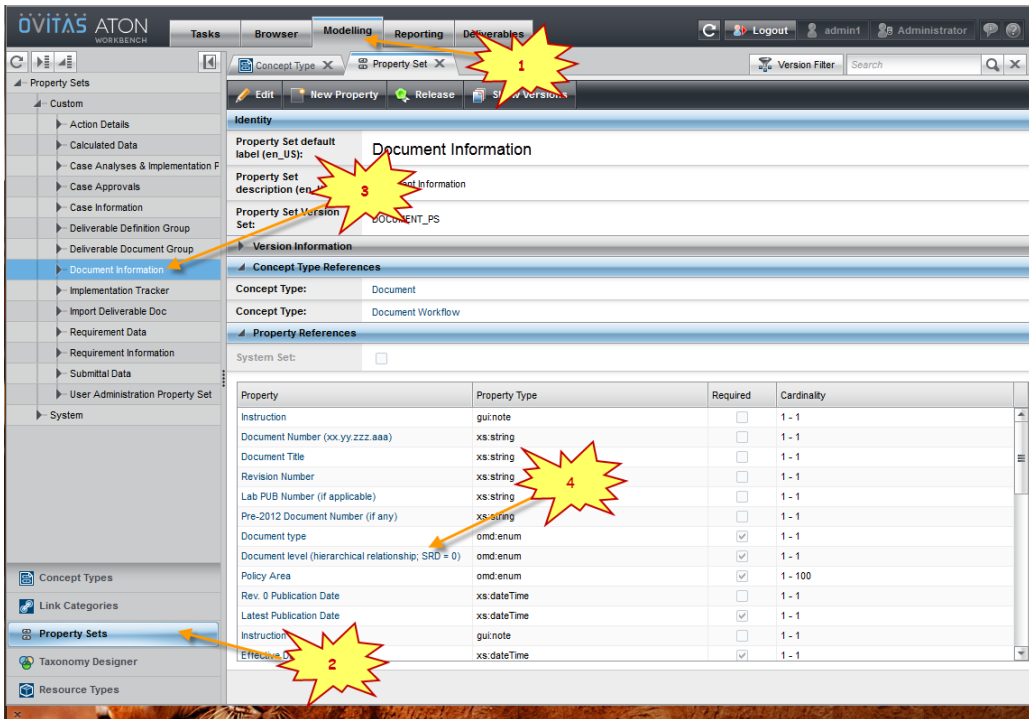
8. How to manage picklists.

[Comment: LJY did this once with Ovitass’s phone help....and we messed up royally because we didn’t think first, and changed an item that was a triggered workflow actions. Lesson learned: Persons who make changes must know the workflow architecture, dependencies, etc. intimately. Let Ovitass make these sorts of changes!!]

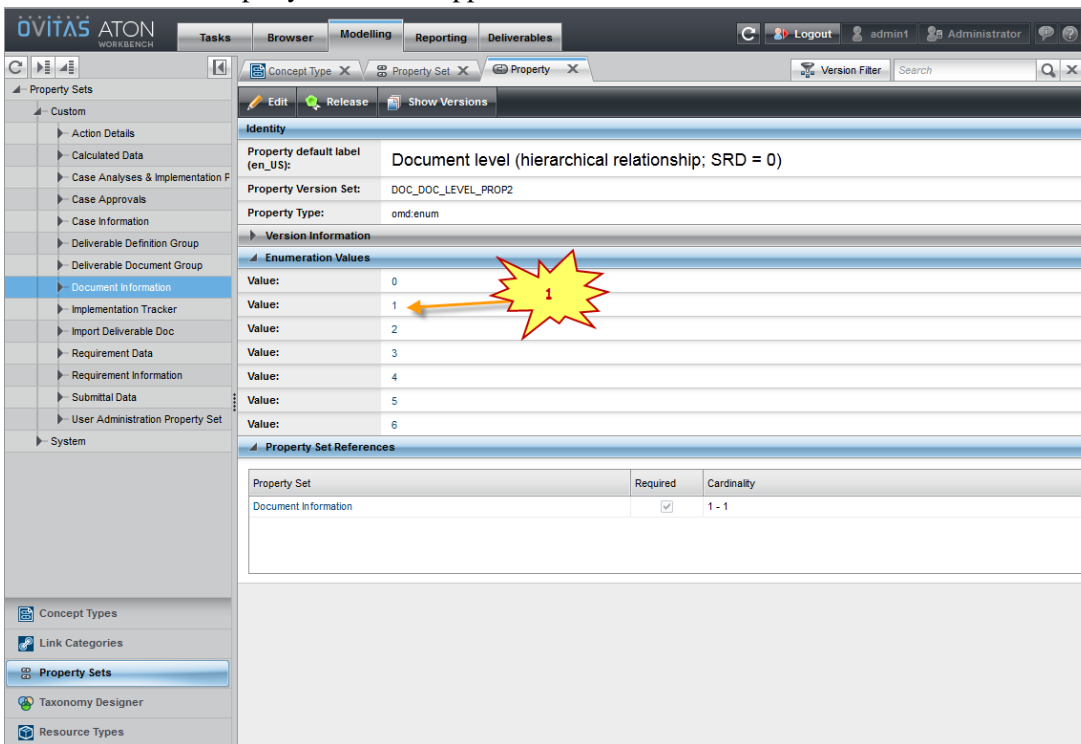
A picklist is simply a property of type “enum” or enumeration. To manage this type of property (or any type of property), you must first navigate to the enumerated property.

- a. Select the Modeling Tab
- b. Select “Property Sets”
- c. Select which property set you wish to manage. In this case we selected “Document Information”. The property set will appear as a tab.

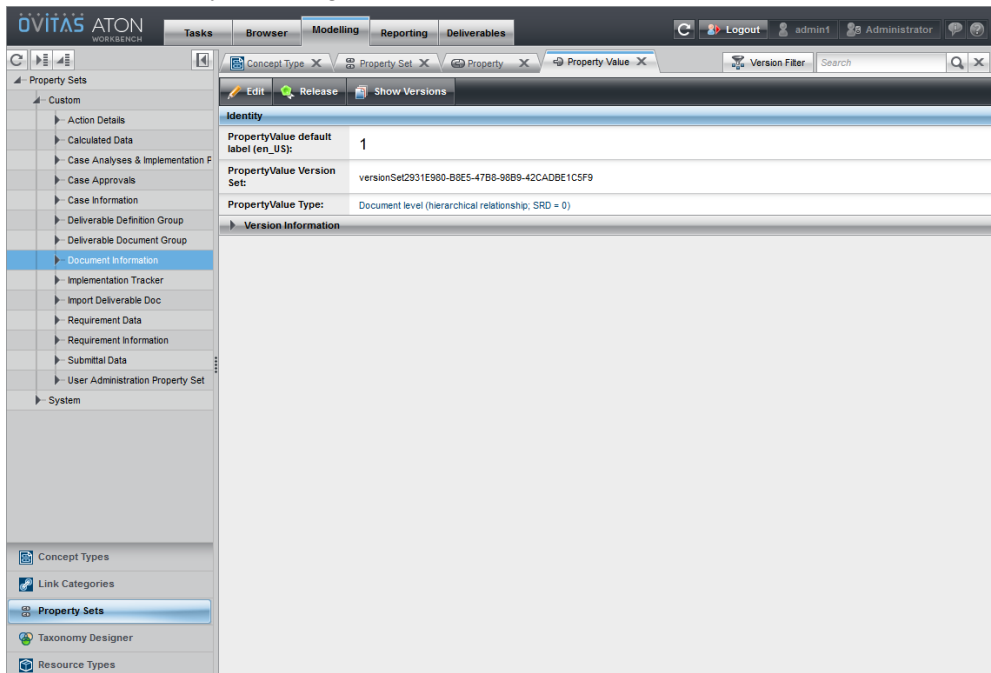
- d. Select which property you wish to manage. In this case, we selected “Document Level ...”. The property will appear as a tab.



- e. From the Property tab, you can edit the property, or view a property value.  
 f. To view or edit a property value, select the value you wish to edit from the property tab.  
 The Property Value will appear as a tab.



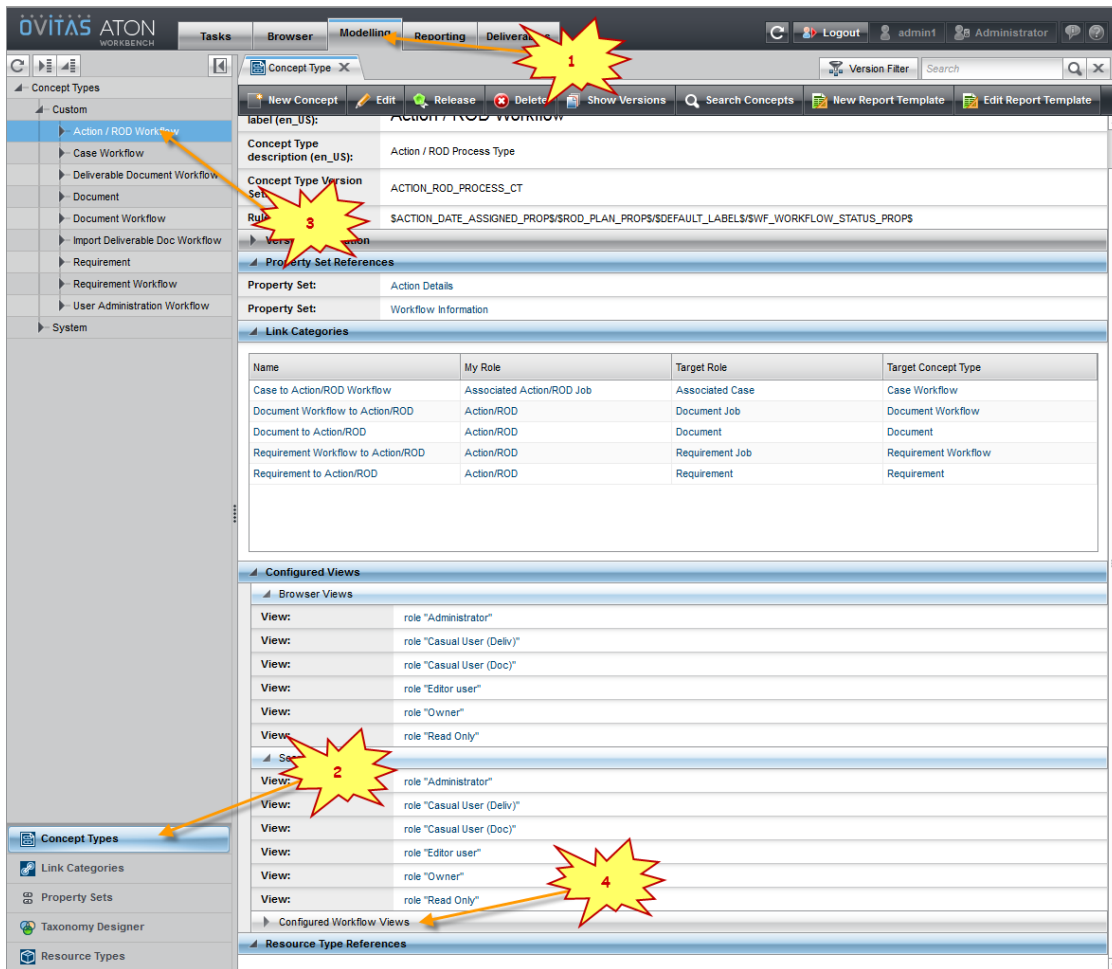
- g. From the Property Value tab, the only thing you can do is to edit the text of the property value.
- h. Click the “Edit” button to bring the property value into edit mode. Click “Submit” to save your changes.



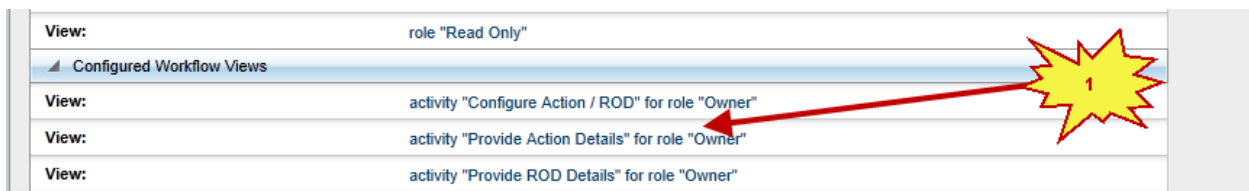
**9. Change parameter status (edit, req, read only)**

To change a property’s status to editable/required/read-only, you have to modify the view corresponding to the Workflow Step.

- a. Select the “Modeling” tab.
- b. Select “Concept Types” from the bottom of the left panel.
- c. Select the concept type from the concept type tree in the left panel.
- d. Expand “Configured Workflow Views” in the right panel. This will show all of the workflow views for the selected concept type. If the selected concept type is not a workflow concept type, this will not appear.



- e. Select the view that corresponds to the Workflow task you wish to modify. If you wish to change the property settings in all tasks you will have to modify each of the views.



- f. When you select a view, it will show you a read-only view of the view. Click on the “Edit” button to modify the view.
- g. To make the property hidden (or un-hide it if it is already hidden), use the “Hidden” checkbox for that property.
- h. To make the property required in that view (or not required if it is already required), use the “Required” checkbox for that property. Note that this will only modify the view. The Property Set can also denote whether a property in a property set is required or not. If a property is not required in ANY view then it should not be marked as required in the property set as this may cause the release operation to fail.

- i. To make the property editable or read-only, you have to modify the Edit Widget. Note that depending on the Type, only certain widgets make sense. For example, you wouldn't want to select the widget DateItemData for a field of type String, as that widget is only for the type dateTime. The following Edit Widgets are read-only:
  - i. RemoteStaticTextItem : this is the read-only people picker widget.
  - ii. StaticTextItemData: use this for most other properties.

The screenshot shows the 'View Parameters' section with the following details:

- View Name: ACTION\_ROD\_PROCESS\_CT - USER\_ROLE\_OWNER - 750a18543d
- View Id: com.ovitas.aton.medas.server.rmi.view.Viewconcepttypebd376956-c46d-11e1-a1b2-1f814751346aUSER\_ROLE\_OWNER\_750a18543d
- Concept Type: Action / ROD Workflow
- Role: Owner

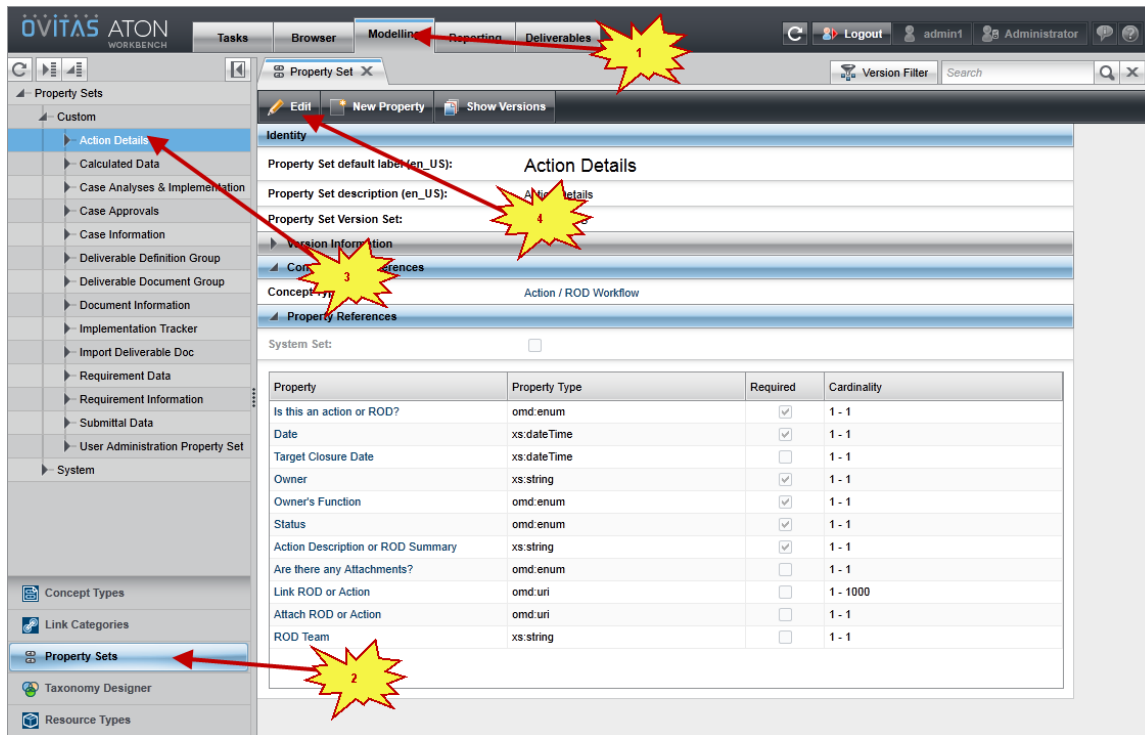
The 'Field Groups' section is expanded to show 'Action Details' with the following table:

Hidden	Property	Type	Label	Required	Cardinality min.	Cardinality max.	View Widget	Edit Widget
<input checked="" type="checkbox"/>	Is this an action	omd.enum		<input checked="" type="checkbox"/>	1	1	StaticTextItemData	ComboBoxItemData
<input type="checkbox"/>	Date	xs.dateTime		<input checked="" type="checkbox"/>	1	1	StaticTextItemData	DateItemData
<input type="checkbox"/>	Target Closure Date	xs.dateTime		<input checked="" type="checkbox"/>	1	1	StaticTextItemData	DateItemData
<input type="checkbox"/>	Owner	xs.string		<input checked="" type="checkbox"/>	1	1	RemoteStaticTextItem	RemoteAutoFillItem
<input type="checkbox"/>	Owner's Function	omd.enum		<input checked="" type="checkbox"/>	1	1	StaticTextItemData	ComboBoxItemData
<input type="checkbox"/>	Status	omd.enum		<input checked="" type="checkbox"/>	1	1	StaticTextItemData	RadioGroupItemData
<input type="checkbox"/>	Action Description	xs.string		<input checked="" type="checkbox"/>	1	1	StaticTextItemData	TextAreaItemData
<input type="checkbox"/>	Are there any Attachments	omd.enum		<input type="checkbox"/>	1	1	StaticTextItemData	RadioGroupItemData
<input type="checkbox"/>	Link ROD or Action	omd.uri		<input type="checkbox"/>	1	1000	ExternalLinkItem	LinkItemData
<input type="checkbox"/>	Attach ROD or Action	omd.uri		<input type="checkbox"/>	1	1	ExternalLinkItem	UploadItemData
<input checked="" type="checkbox"/>	ROD Team	xs.string		<input type="checkbox"/>	1	1	StaticTextItemData	TextAreaItemData

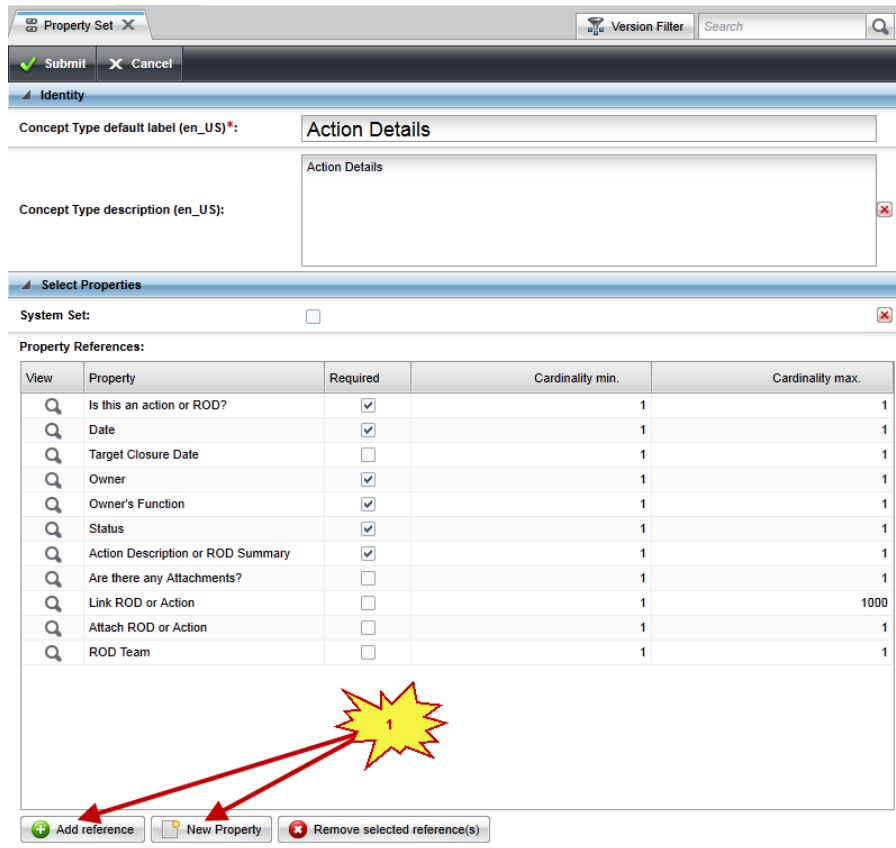
## 10. Add/modify Instructions

An Instruction is a property much like any other property. To add a property, you must modify the Property Set where that property will reside.

- a. Select the Modeling Tab
- b. Select "Property Sets" from the bottom of the left panel.
- c. Select the property set that you wish to modify
- d. Click the "Edit" button.

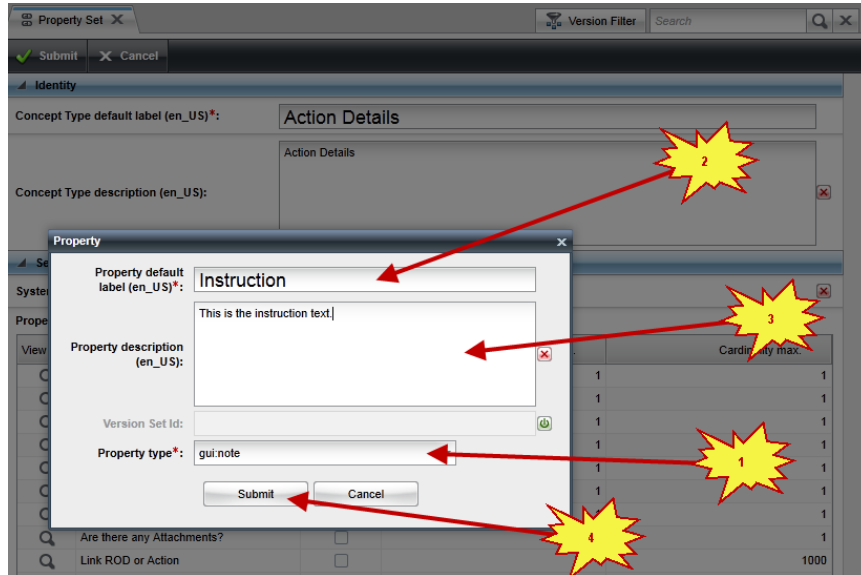


- e. To add a reference to an existing property, click the “Add reference” button. To add a new property, click the “New Property” button.





- f. When adding an instruction, set the Property Type to “gui:note”.
- g. The Property default label should be set to the label that appears next to the instruction. As a convention, I like to use “Instruction” or “Warning”.
- h. In the Property Description, put the instruction text.
- i. Click the Submit button.



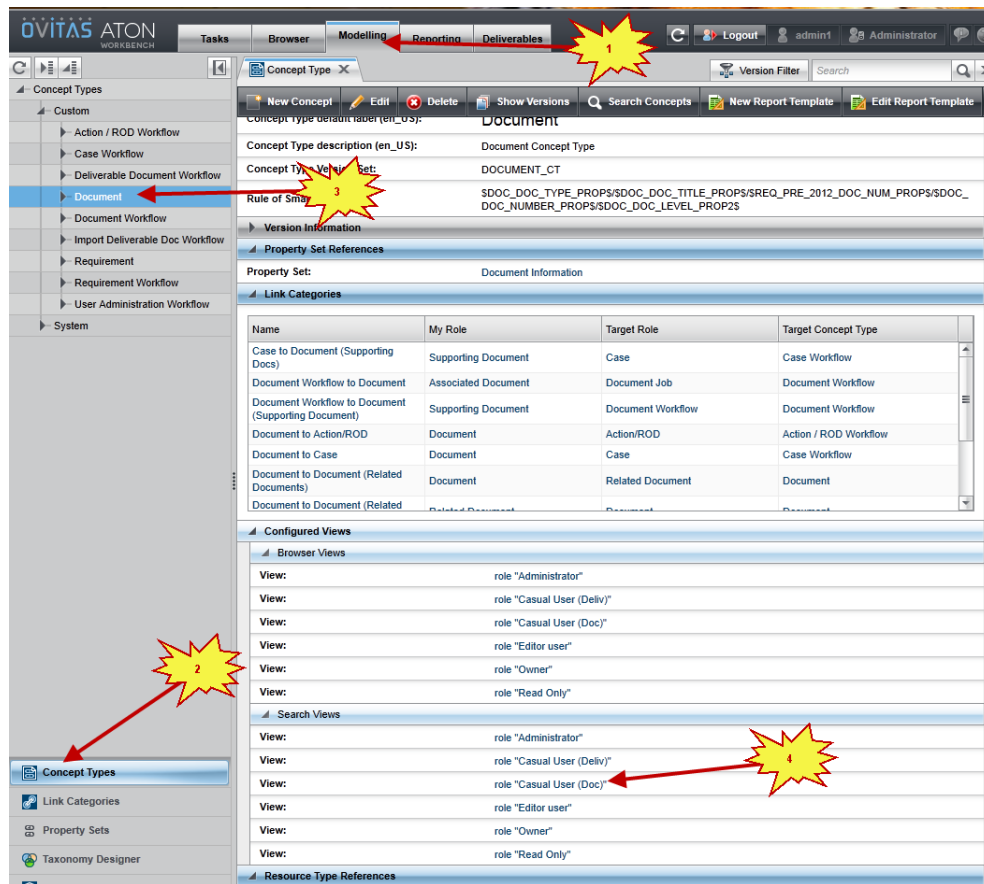
- j. When the new property appears in the Property Set, you will have to assign a min and max cardinality. For instructions, this will be 1 and 1. You can also specify if the property is required. For instructions you want to make sure that the Required checkbox is not checked.
- k. You can reorder the properties in the property set by dragging a property up and down the property set list. This will not change the views. After any property is added to a property set, each of the views will have to be modified to hide/unhide the property, change the widget from the default widget, etc.

**11. Set default view settings: (Job lists at top of screen). Want to set up a default for View-Only, other Casual folk**

The default job in the Tasks tab cannot contain a default. Each user may modify ordering of the columns by dragging them, or may hide columns by right-clicking on the header of the table.

The search results table is modified by changing the search view for each Concept/User Role combination.

- a. Select the Modeling Tab
- b. Select Concept Types from the bottom of the left panel.
- c. Select the Concept Type that you wish to modify from the Concept Type tree in the left panel.
- d. Select the view that corresponds to the Role that you wish to modify.



You can use the search view to hide which properties appear in the search masks for each Concept Type/User Role combination. This also restricts which properties appear in the Search Results table.

## 12. How to adjust reports

See Appendix C – this is rather cryptic and a draft. It may make little sense to a non-technical user.

## VI. Revision History

Revision	Date	Who	Description
0	12-27-2014	L.J. Young	Initial

Appendix A: Copy of 29August 2012 email threads on generating list of users by role. (Item III.1)

SQL to generate RM User reports RM database/After proj complete

8/29/12

Jeff Pouliot <Jeff.Pouliot@ovitas.com>  
to mckremer, me, Kavita

Hi Michael,

Here is the SQL to generate the RM user reports. There are two reports. They are basically the same except they order the results differently. The first reports on all the users registered in the system and lists the groups that they belong to. The second reports on all the groups in the system and the users that belong to that group.

```
-- report on the users and the groups they belong to
select usr_name,OWP_simple_db_user.usr_id,grp_name from
owp_simple_db_user_grp
left join OWP_simple_db_user on owp_simple_db_user_grp.usr_id = owp_simple_db_user.usr_id
left join owp_simple_db_group on owp_simple_db_user_grp.ug_id = owp_simple_db_group.grp_id
order by usr_name, grp_name;

-- report on the groups and the users contained in those groups.
select grp_name,OWP_simple_db_user.usr_id,usr_name from
owp_simple_db_user_grp
left join OWP_simple_db_user on owp_simple_db_user_grp.usr_id = owp_simple_db_user.usr_id
left join owp_simple_db_group on owp_simple_db_user_grp.ug_id = owp_simple_db_group.grp_id
order by grp_name, usr_name;
```

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8/31/12

Lydia Young <ljyoung@lbl.gov>  
to Michael

can you test and/or verify that these are sufficient to extract the RM user reports?

Let me know - so I can close the task.

Thanks.  
Lydia J. Young, Ph.D.  
Requirements Management Program Manager  
Office of Contractor Assurance  
Lawrence Berkeley National Laboratory  
(o) [510-486-6356](tel:510-486-6356)  
(e) [510-965-3467](tel:510-965-3467)

Create Task...

---

8/31/12

Michael Kremer <mckremer@lbl.gov>  
to me

Hello Lydia:

I tried the SQL statements in dev and they seem to work. Here is the output of the first one:

"USR_NAME"	"USR_ID"	"GRP_NAME"
"Abbott,Kim V"	"kvabbott"	"BSO POC"
"Administrator 1"	"admin1"	"Administrators"
"Amaden,Christopher"	"camaden"	"BSO POC"
"Basore,James D"	"jdbasore"	"Casual Docs"
"Bello,Madelyn"	"mtbello"	"RM Committee"
"Bello,Madelyn"	"mtbello"	"RMC Rep"
"Bonaguro,Joy Ellyn"	"jebonaguro"	"RM Committee"
"Byrd,Jacolyn L"	"jbyrd"	"RMC Rep"
"Carr,Michael A"	"macarr"	"Administrators"
"Young,Lydia J"	"ljyoung"	"RM Project Managers"
"Young,Lydia J"	"ljyoung"	"RMC Rep"
"Young,Lydia J"	"ljyoung"	"RMC Rep"
"view only"	"view_only"	"Casual View Only"

And here is the second one:

"GRP_NAME"	"USR_ID"	"USR_NAME"
"Administrators"	"admin1"	"Administrator 1"
"Administrators"	"mckremer"	"Kremer,Michael C"
"Administrators"	"dstein"	"Stein,David"
"Administrators"	"ljyoung"	"Young,Lydia J"
"BSO POC"	"kvabbott"	"Abbott,Kim V"
"BSO POC"	"camaden"	"Amaden,Christopher"
"BSO POC"	"pmburke"	"Burke,Patrick M"
"BSO POC"	"jbyrd"	"Byrd,Jacolyn L"
"BSO POC"	"macarr"	"Carr,Michael A"
"BSO POC"	"rwchapman"	"Chapman,Richard W"
"BSO POC"	"mdavies"	"Davies,Marcel"

LJY note: copy of email is cropped....

Appendix B: Past Correspondence on People-Picker Scheduled Updates (Item III.2)

Item	Issue Type	App Revision #	Date reported	Description	Date resolved/Comments	Ovitas Comments from Development Phase (pre-8 August)	Release Status
267	Tech - Support maintenance	2.2.9110.4022	8/6/12	Add "SmartLabel" column to Submit Deliverables list - make it first left column . [WF task/Scheduled Deliverables/Submit Deliverable --> List].	9/6 Jeff thinks he can handle same way as #206, and take about 1 day. 8/28 (LIV): SmartLabels are configured for	Right now, Can't put smartlabel in the inbox and there is no easy way to do this. Could be issues with some workflows because they start with no info (so smartlabel would be default label). We do the same	
32	change	2.2.1.10067.6032	6/4/13	Doc wf: insert non-LDAP approval			
33	new feature			Include ID numbers where names have been pulled from LDAP			
34	new feature			More complex logic in Search/LAND_OR_NOT in this logic			
271	Utility - Support maintenance	2.2.9110.4022	8/8/12	(Follow on to #261): As part of launching to broader set of users including alerts (#218 and #219), create utility that updates people-picker on some scheduled basis.	11/26 - "monitor" because we'd need a known change (like a new employee) to test 10/23 - test at "go live"	People Picker is updated when users are added to the groups associated with people picker. This should not be an issue.	No Action Required
248	Technical	2.2.9110.4022	7/27/12	Error in closing a scheduled deliverable - it is caught in an unreleased state. Selected "as required"		I am not seeing this here.	

Issues Tracker shows completion of scheduled updating of people-picker approximately 11/2012

On Mon, Aug 6, 2012 at 10:25 AM, Jeff Pouliot <Jeff.Pouliot@ovitas.com> wrote:  
Hi Lydia,

We are working on the fix for #248.

#261: We manually populated the people\_current table when the project started. We have not repopulated it as we want to preserve the emails as being set to your email. This issue will be resolved when we implement #219. When we implement #219 it will be updated from the data warehouse nightly. I can repopulate it again, but it will take some time.

I will update dev (with data from QA) but it might not happen until tomorrow morning.

We can easily strip the data out by doing an export and import. It requires one log into the Linux system and executing a couple of script files we have. I can send the instructions if you are interested.

Jeff Pouliot

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Jeff Pouliot  
jeff.pouliot@ovitas.com



Show details

12/2014: For historical tracing, Issue 261 and 271 were tied to Issue 219 and the original "Go-Live" milestone (August, 2012). "Go-Live" included permitting alerts to go to owners.

**Kavita Patil** <Kavita.Patil@ovitas.com>  
to me, Jeff, Michael  
See my replies inline  
**From:** Lydia Young [mailto:lyyoung@lbl.gov]  
**Sent:** Tuesday, October 23, 2012 1:09 PM  
**To:** Jeff Pouliot; Kavita Patil; Michael Kremer  
**Subject:** Issue #271 - update of people picker - question

- a. Is this on QA?
- à No. Only DEV has the syncing with the datawarehouse setup, that too in a temp table (not used by the app)
- b. What is frequency/schedule?
- à Every day at midnight.

I have to change my LDAP password soon, and so I might as well test #271.  
à The information synced with DW is Name, UserId and email address. Password is not stored in the people\_current table. So we won't be able to test this anyways. Also if we put this on QA and sync the people\_current table emails will start going to actual users.  
Currently ALL email addresses are set to yours. So I suggest we keep it that way till go live.

Lydia J. Young, Ph.D.  
Requirements Management Program Manager  
Office of Contractor Assurance  
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(o) 510-486-6116  
(c) 510-965-3467

People (3)

**Kavita Patil**  
kavita.patil@ovitas.com



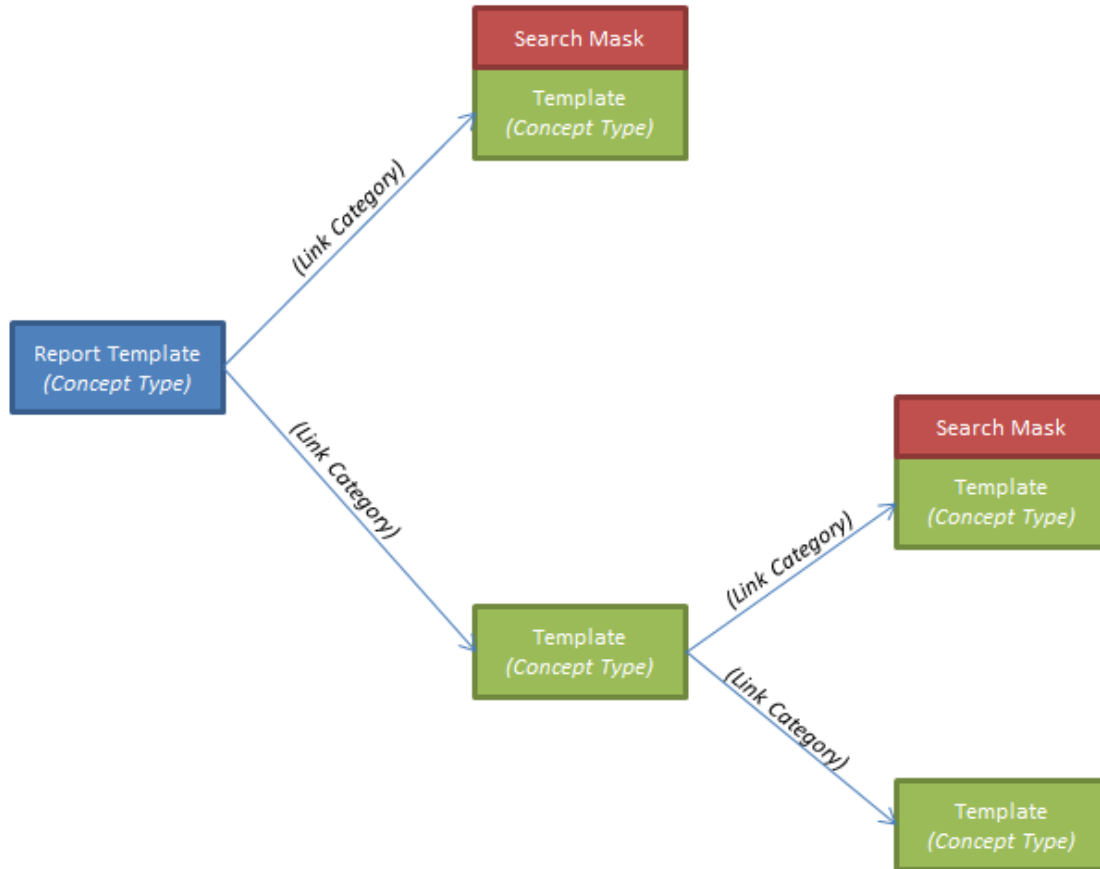
Show details

12/2014: DEV is not synch'ed.

**Appendix C: Copy of 9 July 2012 Ovitass explanation of “Reports” (Item III.12)**

**Reports**

Reports consist of a root **Report Template** defined for a specific Concept Type. This Report Template may also reference other **Templates** defined for specific Concept Types by specific Link Categories from the Report Template. Each of those Templates may in turn reference other Templates by additional Link Categories and so on. At any time a Template is referenced (with the exception of the root Report Template) an optional **Search Mask** may be applied in order to filter out specific content from the report. Below is a diagram showing the construction of a possible Report.



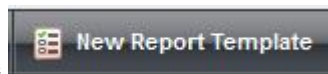
**Templates**

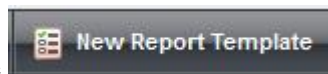
Templates, represented in the Report diagram above by the green boxes, always refer to a specific Concept Type. Users with appropriate permissions in the system can either **create** new Templates or **edit** existing Templates. Let’s take a look at both sets of functionality.

**Template Creation**

To create a Template for a specific Concept Type

1. Go to the **Modeling** tab
2. Select the **Concept Type** you want to create a Template for



3. Click the  button to open a editable template tab for your new template (note: this button will not appear if you do not have permissions to create a new Template)

Each Template requires a **template name** for the Template (to indicate what the template should be used for, such as “Open Case Template” or “Policy Document Template”), and allows the user

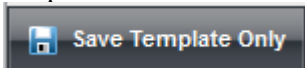
to select the **properties** you want to include in reports that use this Template (using the *include* checkboxes in the grid of properties), and define the **order** that those properties will be presented in reports that use this Template (by dragging and dropping properties into the order desired in the grid of properties).

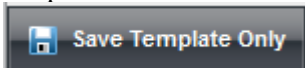
The real power of Templates, however, lies in the ability to **chain Templates together** and use **Search Masks** to filter out irrelevant data.

In the **Linked Concept Type Settings** section of the Template editor you should see the Link Categories from the selected Concept Type to other Concept Types (if any exist).

You may assign a **Template** to the **Specify Report Template** field of any of these Link Categories, and by doing so you are indicating that whenever this template is used in a report, links of that specific Link Category type will be traversed and the resulting data at the end of the link will be included in the report and formatted using the template you assigned to the Link Category.

You may additionally assign a **Search Mask** to any Link Category with a Template assigned using its **Filter Results by Search Mask** field, which will filter out any links where the data at the end of the link doesn't meet the Search Mask's criteria. In this way it becomes much simpler to report on "open" cases or documents owned by a specific person.

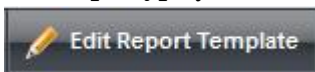


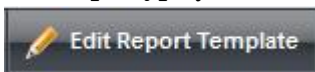
Once finished, you can save your Template by using the  button.

### Template Editing

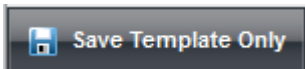
To edit an existing Template for a specific Concept Type

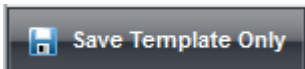
1. Go to the **Modeling** tab
2. Select the **Concept Type** you want to edit a Template for



3. Click the  button and select the template you want to edit to open an editable template tab for the existing template (note: this button will not appear if no Template for the Concept Type exists or if you do not have permissions to edit any of the existing Templates)

An editor similar to the creation editor should appear and can be used in similar fashion.

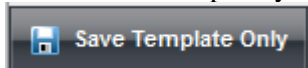


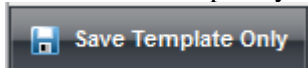
Once finished, you can save your Template by using the  button.

**Caution:** When editing a Template you may see a **Report Information** section at the top of the page (see below).

<b>Report Information</b>			
<b>Report Name:</b>	Closed Actions		
<b>Authorized Role:</b>	Administrator		
<b>Authorized Role:</b>	Editor user		
<b>Template Information</b>			
<b>Template Name*:</b>	Root for Closed Actions Report		
<b>Template Author:</b>	admin1		

This indicates that the Template you are editing is a **Report Template**. If you save this template



using the  button you will **lose the report information set for this**

*template*. This may be desirable in some cases, such as when you want to turn off a report but use the Template in other reports. If you want to preserve the report information for a Report

Template after editing, remember to select the  option instead.

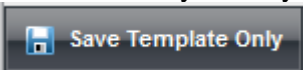
## Report Templates

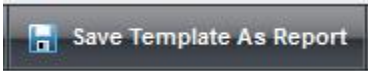
Report Templates, represented in the Report diagram above by the blue box, are Templates themselves with additional information to indicate

- That they can start a Report
- The users who have access to the Report

## Report Template Creation

Report Template Creation occurs exactly like any other Template Creation with the exception

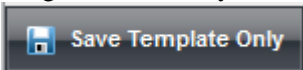
that instead of using the  button to save the Template, you use the

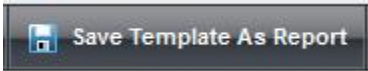
 button to save the Template as a Report Template.

A user saving a Template as a Report Template will need to specify a **report name** for the Report Template, as well as select the **User Roles** who have permission to access the Report Template.

## Report Template Editing

Report Template Editing occurs exactly like any other Template Editing with the exception that

instead of using the  button to save the Template, you use the

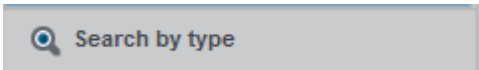
 button to save the Template as a Report Template

A user saving a Template as a Report Template will need to specify a **report name** for the Report Template, as well as select the **User Roles** who have permission to access the Report Template.


## Search Masks

Search Masks, represented in the Report diagram above by the red boxes, are filtering tools that allow you to select a subset Concepts from a specific Concept Type based on property values.

### Search Mask Creation

1. Go to the **Browser** tab
2. Click the  button
3. Select the **Concept Type** you want to create a Search Mask for to open an editable search tab

Each Search Mask requires the user to set the restrictions for the Concept Type's **properties**.

Once finished, the Search Mask can be saved using the  button.