

Kofax Customer Communications Manager

5.0

Administrative Manual

CCM Repository 5.0



Contents

Introduction to the CCM Repository Administrative Manual	4
Other manuals	4
Copyrights and trademarks	5
The administrative account	6
Password	6
I forgot the password	7
Method 1	7
Method 2	7
After installation	8
Enter licenses	8
Create user accounts	9
Set document template	11
Copy repository.dot to the file system	11
Set the path to the repository.dot	11
Using your own template	11
Set CCM Repository role	12
Purpose	12
Configuration	12
Revision number postfix:	13
CCM Repository role:	13
CCM Repository role signaling color:	13
Administrative tasks	15
User management	15
Managing	15
Unified logon	15
Create a user account	16
Rename a user account	17
Authorize a user account	18
Change a user's password	18
Delete a user's account	19
Manage user sessions	20
Role management	20
What is a Role	20
Predefined roles	20
Creating or editing roles	21
Lock breaking	21
Break a lock on a specific object	22
Break all locks of a user	22
Purging deleted items	22
Audit log	23
Licenses	23
Set document template	23
Set CCM Repository role	23
Handle accepted revisions as published	23
Configuration	25
General	25
Syntax	25

Ini file sections	25
Shared configuration	26
[Configuration]	26
Server configuration	26
[Server]	26
Unified logon	27
Licenses	27
[ODBC]	27
[Network]	28
Time-outs	28
Client configuration	29
[server]	29
Administrator menus	30
Administrator File menu	30
New	30
Edit role	30
Purge	31
Cleanup project	31
Administrator Action menu	31
Break lock	31
Change user password	31
Change Document Template	31
Installation properties	32
Administrator Report menu	32
User authorization	32
Administrator View menu	32
License	32
Sessions	32
Administrator tools	33
Repdump/reload	33
Repdump.exe: exporting the CCM Repository database	33
Repload.exe: loading an exported database	33
New database	34
Configure the CCM Repository	34
Restart the Server	34
Initializing database and uploading Reports	34
Backups	35
Interface translation table	36
Appendix	38
Configuration	38
Configure Authorization tab	38
Configure Characteristics tab	39
Configure DID/CC and Style document tabs	39
Configure Fields Set tab	39
Configure Project tab	39
Cut	40

Introduction to the CCM Repository Administrative Manual

The CCM Repository is a model development and document management system. The CCM Repository is developed to support the development of ITP Microsoft Word Models.

In this manual common administrative tasks and configuration of the CCM Repository are discussed.

Chapter [The administrative account](#) (page 6) explains the built-in administrative account and what to do if you have lost the password for it.

Steps to be taken after installation of the CCM Repository can be found in chapter [After installation](#) (page 8).

Chapter [Administrative tasks](#) (page 15) presents more detailed information about the specific administrator tasks.

The configuration files of both the CCM Repository Server and the CCM Repository Client can be edited by hand for fine-tuning or changing the configuration. Chapter [Configuration](#) (page 25) describes the options and settings of these configuration files.

The administrator of the CCM Repository has a slightly different menu than the other users. Chapter [Administrator menus](#) (page 30) describes the different menu items available to the administrator.

Chapter [Administrator tools](#) (page 33) provides an overview of the different tools available to the administrator.

In the CCM Repository user accounts can be given different roles. These roles list the actions that the role gives access to. Chapter [Appendix](#) (page 38) provides information about those actions that are not menu items.

Other manuals

You can find a general user's guide in the ITPMDKRepository_Manual.pdf, which is presented in the CCM Repository Client Start menu. For information on how to write your own reports on the CCM Repository, or adapt existing ones, check the ITPMDKRepository-Reports_Manual.pdf. The Text Block editor, ITP/Model Development Kit, (Q)Form Editor and configuration window come with an Help file.

All documentation can also be found on the Kofax Customer Communications Manager Knowledge Center (<http://ccmkc.kofax.com>).

Copyrights and trademarks

© 1993–2016 Lexmark. All rights reserved.

THIS SOFTWARE CONTAINS CONFIDENTIAL INFORMATION AND TRADE SECRETS OF KOFAX. USE, DISCLOSURE OR REPRODUCTION IS PROHIBITED WITHOUT THE PRIOR EXPRESS WRITTEN PERMISSION OF KOFAX.

Kofax, the Kofax logo, and the Kofax product names stated herein are trademarks or registered trademarks of Kofax in the U.S. and other countries. All other trademarks are the trademarks or registered trademarks of their respective owners.

U.S. Government Rights Commercial software. Government users are subject to the Kofax standard license agreement and applicable provisions of the FAR and its supplements.

You agree that you do not intend to and will not, directly or indirectly, export or transmit the Software or related documentation and technical data to any country to which such export or transmission is restricted by any applicable U.S. regulation or statute, without the prior written consent, if required, of the Bureau of Export Administration of the U.S. Department of Commerce, or such other governmental entity as may have jurisdiction over such export or transmission. You represent and warrant that you are not located in, under the control of, or a national or resident of any such country.

DOCUMENTATION IS PROVIDED "AS IS" AND ALL EXPRESS OR IMPLIED CONDITIONS, REPRESENTATIONS AND WARRANTIES, INCLUDING ANY IMPLIED WARRANTY OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE OR NON-INFRINGEMENT, ARE DISCLAIMED, EXCEPT TO THE EXTENT THAT SUCH DISCLAIMERS ARE HELD TO BE LEGALLY INVALID.

The administrative account

The CCM Repository has a special, built-in user account for administrative purposes, called ITP Admin. This special user has some privileges that are not normally available to the other, common user accounts. These include:

- Entering and reviewing CCM Repository licenses.
- Viewing, and possibly terminating, active user sessions.
- Managing user accounts, roles and global user authorization.
- Breaking users' locks.
- Setting some installation properties.
- Purging deleted items from the database.

On the other hand, the ITP Admin account cannot perform common model development or other primary tasks.

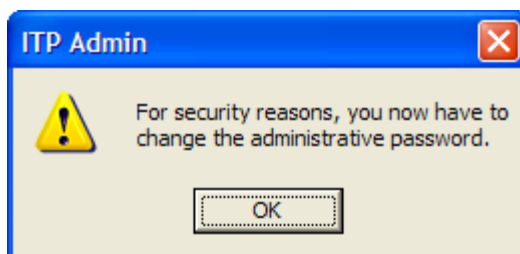
The ITP Admin account, and user sessions of the ITP Admin account, do not count against the number of users mentioned in the license. This implies that ITP Admin can also log in if the license is violated, which is needed to be able to enter a new license.

Other users can be granted the 'Allow login as Admin' right (on the Authorisation tab of the Configuration dialog of the user account). These users will then be able to login as administrator via the File menu. If they do so, they will have the same rights ITP Admin has, without their normal privileges. Note that such a user session does not count against the license.

Versions prior to 4.2.1 do not support ITP Admin rights for other user accounts.

Password

The built-in ITP Admin user account has the default built-in password `www.aia-itp.com`. For security reasons, the CCM Repository will force you to change this password when you first log in as ITP Admin.





I forgot the password

If the password to the ITP Admin account is lost you can use another user account with administrative rights to reset the ITP Admin password. If no user account is configured with administrative rights you will need a more drastic way to reset the password.

It is possible to have the CCM Repository regenerate the default password. To do this, you need access to the CCM Repository database, and you need a tool to execute SQL commands against that database.

Method 1

Enter and execute the following SQL statement:

```
DELETE FROM T1200 WHERE C1201=1
```

This will remove the ITP Admin account.

Locate the `cvc.exe` program that is installed in the program folder of the CCM Repository Server, either using the Windows Explorer or the command line. Now restart the CCM Repository Server and run the `cvc.exe` program within 10 seconds after starting the server. This will regenerate the ITP Admin account. After the `cvc` program has finished, start an CCM Repository Client and log in again as ITP Admin with the default password. You will again be prompted to change the password.

Method 2

Alternatively, you can also execute the following SQL statement:

```
UPDATE T1200 SET C1203='WxznduXnvZCsW6tArBO+0g==', C1207=NULL WHERE C1201=1
```

This will reset the password to its default value. Take care to copy the command exactly as shown.

After installation

This section is mainly of interest after a fresh install of the CCM Repository. If you performed an upgrade of an existing CCM Repository system, you probably already performed the steps mentioned here.

Warning

Please be aware that the database attached to CCM Repository contains important production data. Make sure that it is backed up on a regular basis.

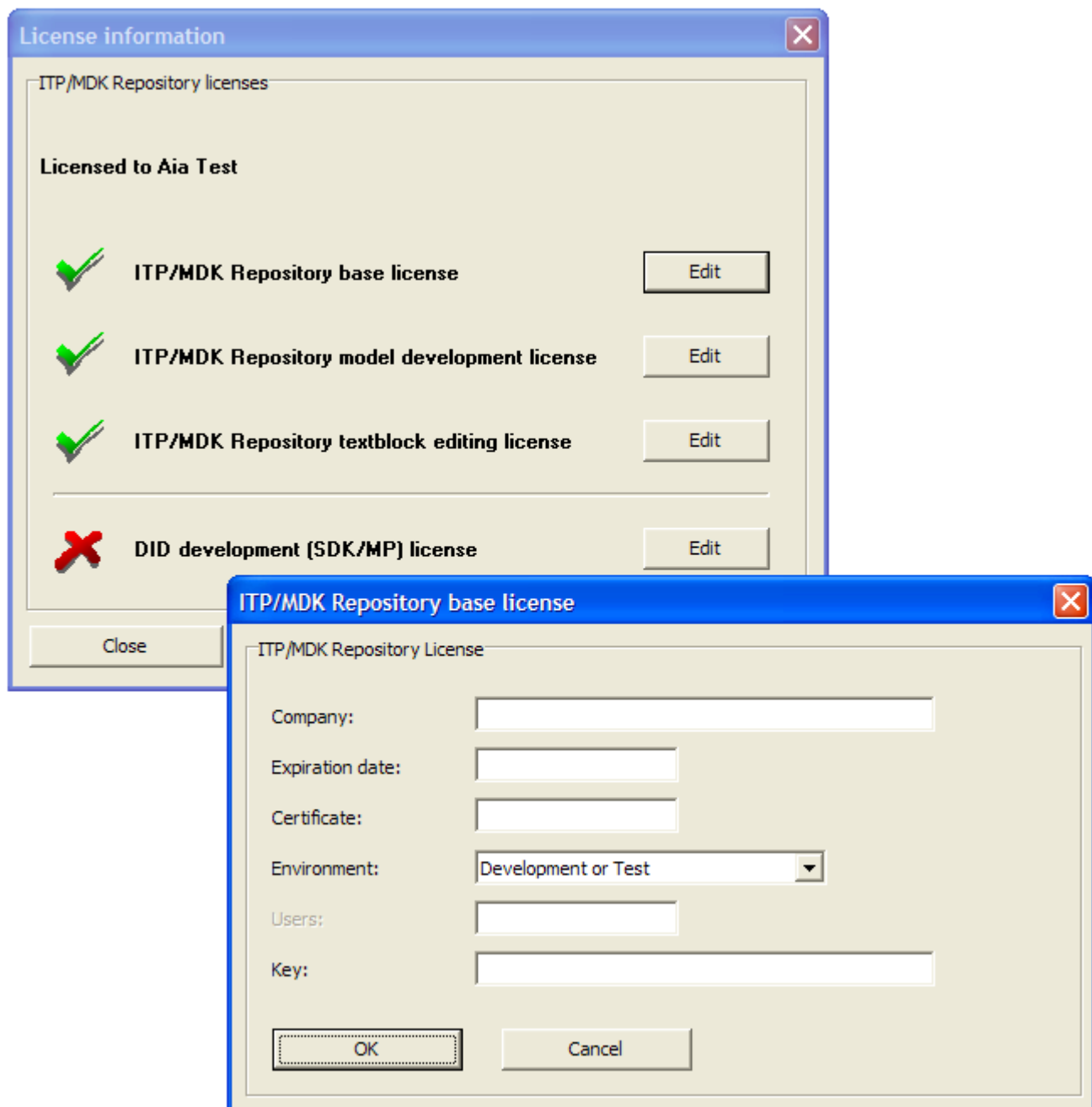
When you have installed the CCM Repository you need to perform the following steps. Not all of them are mandatory, and can be postponed to a convenient moment, when you want to configure the CCM Repository to match your needs more closely.

Enter licenses

To make the CCM Repository fully functional, you need to enter the licenses that you have obtained.

Login in as ITP Admin, with the default password (www.aia-itp.com). You will be prompted to change the password. Make sure to remember this password.

Select License... from the View menu. Click the button Edit to enter the license information for the Base license, the Model development license, and the Text Block editing license in turn. The DID development (SDK/MP) license is only needed if you want to develop DID in the CCM Repository.



The Model development license and Text Block editing license come with a number of users. These indicate the number of user accounts and simultaneous user sessions that are allowed for model development and Text Block editing, respectively.

Create user accounts

The built-in ITP Admin account is for administrative purposes only, and cannot participate in model development or other common CCM Repository tasks. You need to create one or more user accounts for this. After selecting the folder Users you can choose the option New user... from the

File or context menu. Enter a user name and password, which the user will need to log in. Also enter the full name.

New user...

Please enter the name and password for the new user, and press 'Add'.

Username:

Full name:

Password:

Repeat password:

At least one user account will need the right to create projects and assign authorization to users. To accomplish this, select the **Users** node in the tree view, and double-click the user on the right who you want to give this authorization. Alternatively, select **Configuration...** from the shortcut menu on that user.

user01 - Configuration

General Authorisation

Below you can check the roles that this user assumes regardless of project or other contexts.

Global roles

Name	Checked
<input type="checkbox"/> Deployer	
<input type="checkbox"/> DID developer	
<input type="checkbox"/> Field manager	
<input type="checkbox"/> Model developer	
<input checked="" type="checkbox"/> Project creator	✓
<input checked="" type="checkbox"/> Project manager	✓
<input type="checkbox"/> Test block manager	

Select the **Authorization** tab in the ensuing **Configuration** dialog, and mark the **Project Creator** role in the **Global Roles** panel. Click **OK** to close the dialog and **save** the changes.

The check box 'Allow login as Admin' will, if checked, allow the user to log in with the same rights as ITP Admin. The user can do so with the 'Log in as Administrator' option on the File menu to explicitly request this behavior.

Versions prior to 4.2.1 do not support ITP Admin rights for other user accounts.

Set document template

The next thing you need to do is install the Repository.dot template. This template will provide users with the ITP styles in their ITP/Model Development Kit. The function of this template is discussed elsewhere.

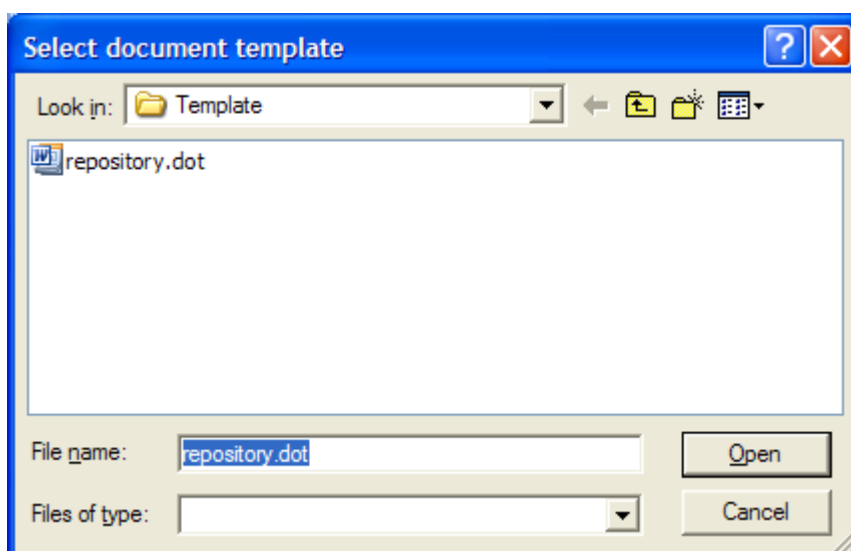
The Repository.dot template is only provided in the Extra folder in the install folder of the CCM Repository Server. It needs to be copied to the file system and the administrator must configure the path to it in the CCM Repository. This template contains the ITP styles and you are free to edit (a copy of) it. We recommend using the ITP styles but apart from that feel free to adjust the template to your needs.

Copy repository.dot to the file system

The Document Template is called repository.dot. It must be copied to a location on the network that is accessible to all CCM Repository Clients. If you already use an ITP template for all ITP users on your network this step can be omitted.

Set the path to the repository.dot

After the template has been copied, the path to it needs to be set in the CCM Repository. The item Change Document Template... in the Action menu of the administrator offers you a file select window in which the template can be located and selected.



Note that only the path is stored in the CCM Repository, not the template itself.

Using your own template

If you already use an ITP template on your network, you can set the path to it to keep using it.

Only .dot files are accepted and a content check will be performed on the selected template.

Note

The template will be used for new documents. It has no effect on existing documents.

Note

Any user of the CCM Repository can edit the repository.dot template. To prevent users from editing the template make it read only.

Set CCM Repository role

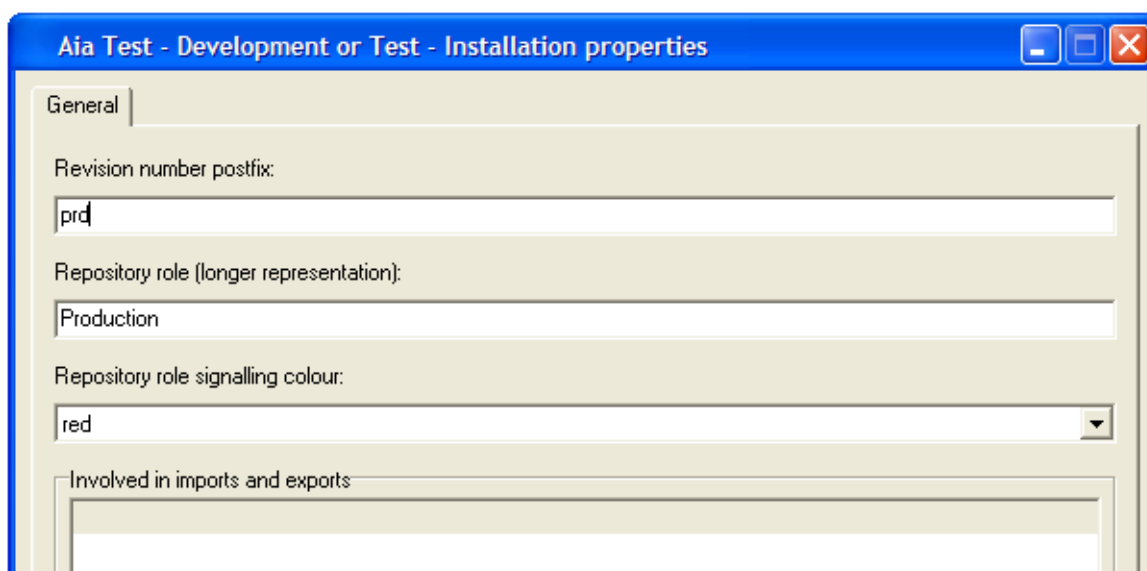
This step can be omitted if you are only using a single CCM Repository in your organization, or you do not plan to export (parts of) your projects to other CCM Repository installations.

Purpose

The CCM Repository supports and encourages separation of development steps, e.g., Development, Test, Acceptance, and Production into several CCM Repository installations. The role, or purpose, of such an CCM Repository installation can be configured in that installation, so that the CCM Repository Client can clearly show to the user with which installation he is currently working. Furthermore, objects and revisions that are exchanged between several such installations hereby can clearly show their origin.

Configuration

Select Installation properties from the Action menu. In the following dialog, provide the following information:



Aia Test - Development or Test - Installation properties

General

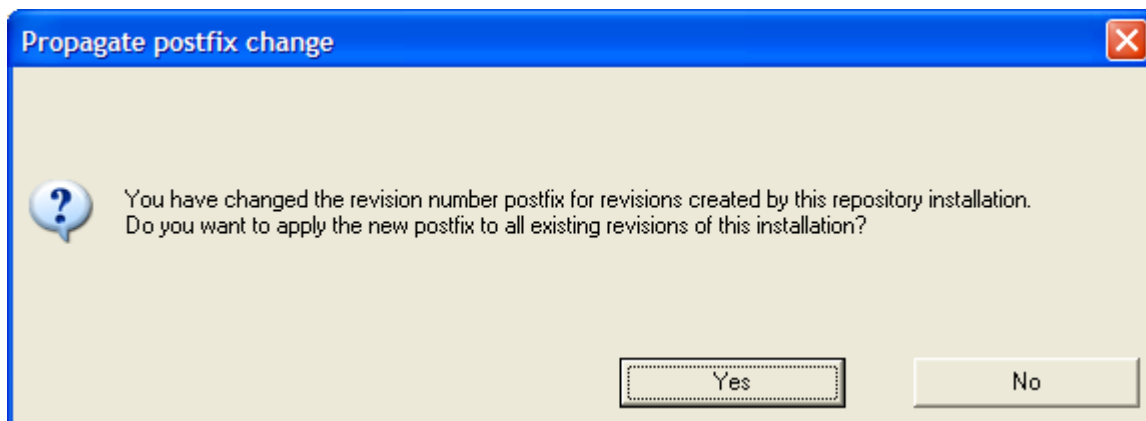
Revision number postfix:
prd

Repository role (longer representation):
Production

Repository role signalling colour:
red

Involved in imports and exports

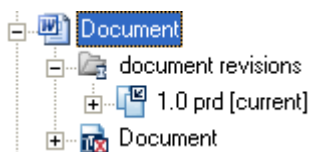
After filling in the desired fields, click **OK**. If you changed the revision number postfix, a dialog box will pop up asking you whether you want to apply the new postfix to all existing revisions.



Click **Yes** to have all existing revision get the new postfix, **No** if you want existing revisions to keep the postfix they already had. In a new installation, there are no revisions that are eligible for getting a postfix, so the choice will not matter in that case.

Revision number postfix:

Enter a very short (several characters) text here, that briefly describes the role of the CCM Repository installation. This may for instance be 'dev' or 'prd' for development or production repositories. This short text will be put behind every revision number of revisions created in this installation, yielding revision numbers like '1.2 prd'. This helps identifying the origin of revisions that are exported and imported into another installation.



CCM Repository role:

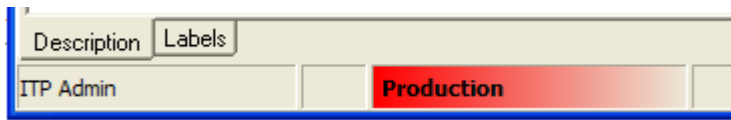
Essentially conveying the same information as the revision number postfix, this field contains a longer representation of the purpose of the CCM Repository installation. Enter e.g., 'Development' for a development installation. This text will be displayed in the status bar of all CCM Repository Client windows.

CCM Repository role signaling color:

Under circumstances that a user has access to several CCM Repository installations, and it is important that he is always aware of which installation he is working with, the signaling color can give some extra visual feedback. The color selected here will be used as background color of the part of the status bar that displays the CCM Repository role name. It can e.g., be used to warn the

user that he is working in the production installation, to make him extra careful.

Selecting a signaling color is optional.

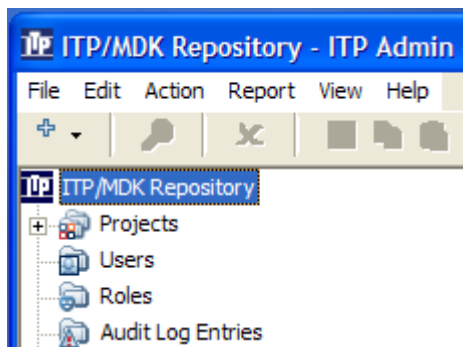


Administrative tasks

This section lists the tasks specific to the users with administrative rights or the ITP Admin user account.

When the CCM Repository logs in to the CCM Repository the following special Administrator folders are shown:

- Users
- Roles
- Audit log entries



These folders contain information and objects specific to the administrator. They will be addressed below, where applicable.

User management

Only ITP Admin or a user with administrative rights may create, delete or change user accounts. The user accounts can be found in the folder Users at the same level as the Projects folder. Only administrators have access to this folder.

Managing

The administrator can create new user accounts, and rename and delete existing ones. A user account has a login name, a password and a full name. The latter is used for identification purposes.

Note

If spaces are the only differences in names, they are considered to be the same. It is not possible to have users with the same name.

Unified logon

Normally the CCM Repository Client will prompt the user for his name and password when starting. Optionally 'unified logon' (also known as 'single sign-on') can be used. In that case the user name of the Microsoft Windows account, with which the user is logged on to Microsoft Windows, is also used to log on to the CCM Repository. This logon is performed automatically when the CCM Repository Client starts. In this case the password of the user is not used. To avoid that a local Microsoft Windows user inadvertently gains access, it is checked that the user name on

the client maps to the same account as on the server.

To use unified logon, user accounts must still be created in the CCM Repository. The names of these accounts must match those of the Microsoft Windows user accounts. Also the CCM Repository Server must be configured to allow unified logon. Add:

```
[Configuration]
AllowUnifiedLogon=Y
```

to the servers' itprep.ini file, as explained in the section [Configuration](#) (page 25). Contrary to most settings, you don't need to restart the CCM Repository Server after changing it.

When the CCM Repository Server is configured to use unified logon, it is still possible to force individual CCM Repository Clients to ask the user explicitly to login. You can do this by starting the CCM Repository Client with the `/asklogin` flag, or by adding the following line to the clients' itprep.ini file:

```
[Configuration]
Asklogin=Y
```

When you are already logged in into the CCM Repository Client you can easily switch to another user by choosing:

File > Switch user

Note

If you choose to switch to another user, your rights will also change.

Create a user account

The administrator can add a new user, by selecting *New > New User...* from the File or context menu, or by clicking the button with the + sign on the toolbar and select New User.... The window New User... is opened:

The screenshot shows a dialog box titled "New User...". Inside the dialog, there is a text prompt: "Please enter the name and password for the new user and click Add User." Below this prompt are four text input fields arranged vertically, labeled "User name:", "Full name:", "Password:", and "Repeat password:". At the bottom of the dialog, there are two buttons: "Add User" and "Cancel".

Enter a user name and password, which the user will use to log in to his account. Also provide a

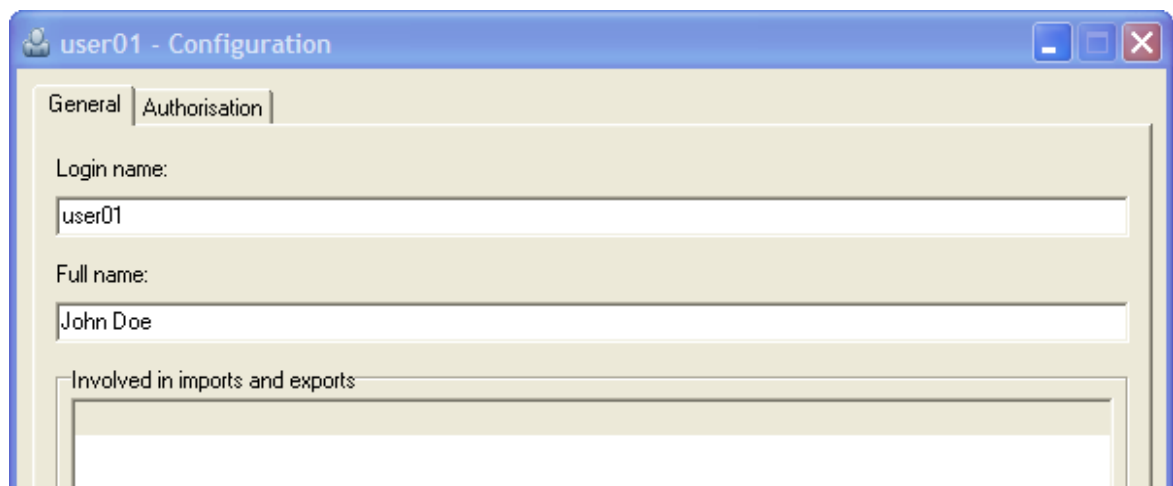
full name, identifying the user. The password must be at least six characters long.

Rename a user account

The administrator can change a user's login name.

Right-click on the user and select **Rename** or click on the users name and click again or press **F2**. The name will stay selected, a box will appear around the name and the cursor is positioned at the end of the name.

Select the **Users** node in the tree view and find the user account in the details pane. Select the **Configuration...** menu option from the context menu of a user account, or double-click the user account. The **Configuration** dialog shows up.

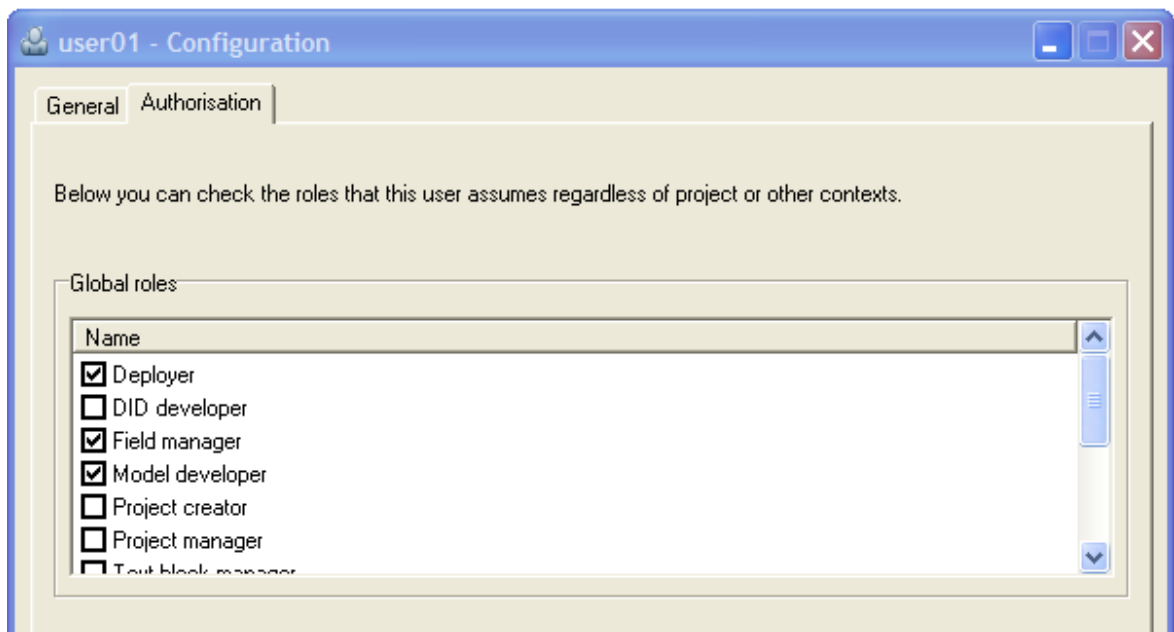


On the tab **General** the login name and full name of the user account can be changed.

Authorize a user account

Select the **Users** node in the tree view and find the user account in the details pane. Select the **Configuration...** menu option on the context menu of a user account, or double-click the user account. The **Configuration** dialog shows up.

The authorization of the user can be changed on the tab **Authorization**. This can be done by selecting or de-selecting roles in the **Global roles panel**. (Roles are described below.) To be able to create new projects, at least one user must have Project Creator authorization on global level, i.e., configured on the user account itself.



Note that roles assigned to the user account here are global, meaning that the user account has these roles for all projects in the CCM Repository installation. More fine-grained authorization can also be managed by non-administrative users with the proper authorization (e.g., Project Creator or Project Manager), allowing users to receive authorization for a specific project, folder or even document. When a user is not authorized for a specific folder or object, he will not see this information. This way it is possible to hide irrelevant folders and objects, e.g., for users that only have right to use the Text Block editor. Refer to the CCM Repository Manual, section Roles and Authorization for more information.

The check box 'Allow login as Admin' will, if checked, allow the user to log in with the same rights as ITP Admin. The user can do so with the 'Log in as Administrator' option on the File menu to explicitly request this behavior.

Versions prior to 4.2.1 do not support ITP Admin rights for other user accounts.

Note

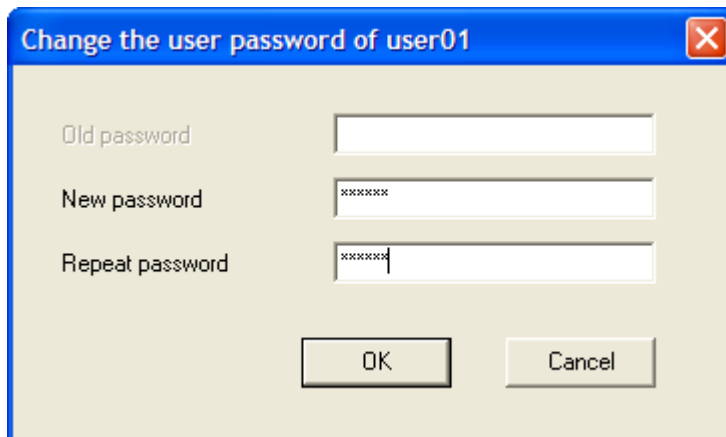
The user whose authorization has been changed must log out and log on again for the change to take full effect.

Change a user's password

A user can change his own password. In case this password is lost, the administrator can reset the password of other users.

Select the **Users** node in the tree view and find the user account in the details pane. Select the menu option **Change user password...** on the shortcut menu of a user account. The **Change user password** dialog shows up.

Enter the new password twice, to prevent typing errors. Note that you do not have to enter the old (possibly lost) password.



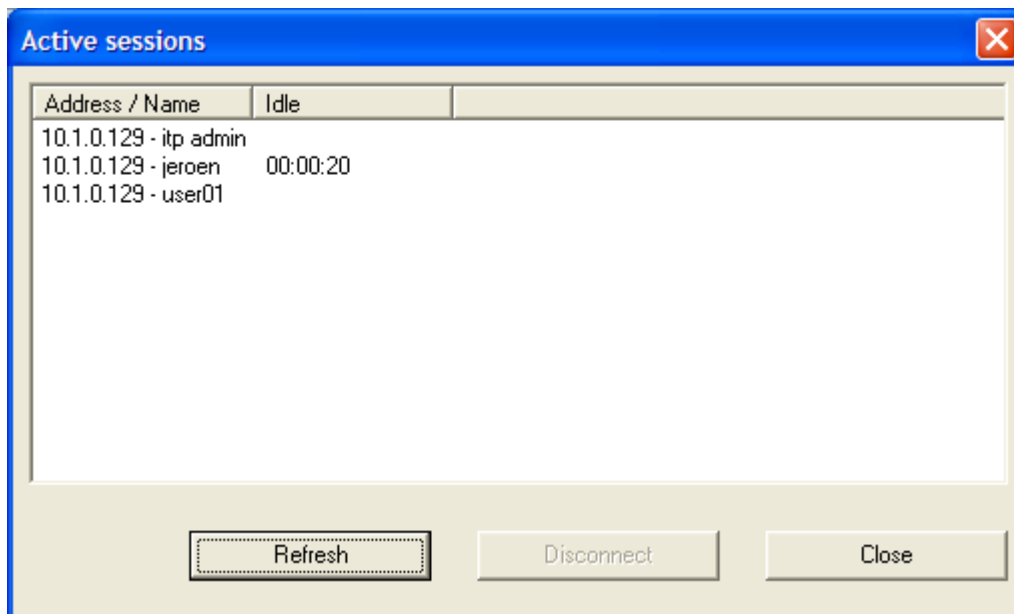
Delete a user's account

Select the **Users** node in the tree view and find the user account in the details pane. Click the button **Delete**, or select **Delete** from the shortcut menu of the user account to delete it. You will be asked to confirm deletion.

Deleting a user will not immediately remove it entirely. Instead, the user account is marked for deletion. This implies that the user account cannot be used anymore to log into the CCM Repository. It will also no more count against the maximum number of users in the license. However, the account stays available as reference information. e.g., models created by this user account will still list this user account in the column 'created by', provided that the **View** option **Show deleted items** is turned on.

Manage user sessions

The **Sessions...** option in the **View** menu displays a list of currently active user sessions. The administrator may elect to close a user session from this window, e.g., if that user session appears to hang.



Role management

What is a Role

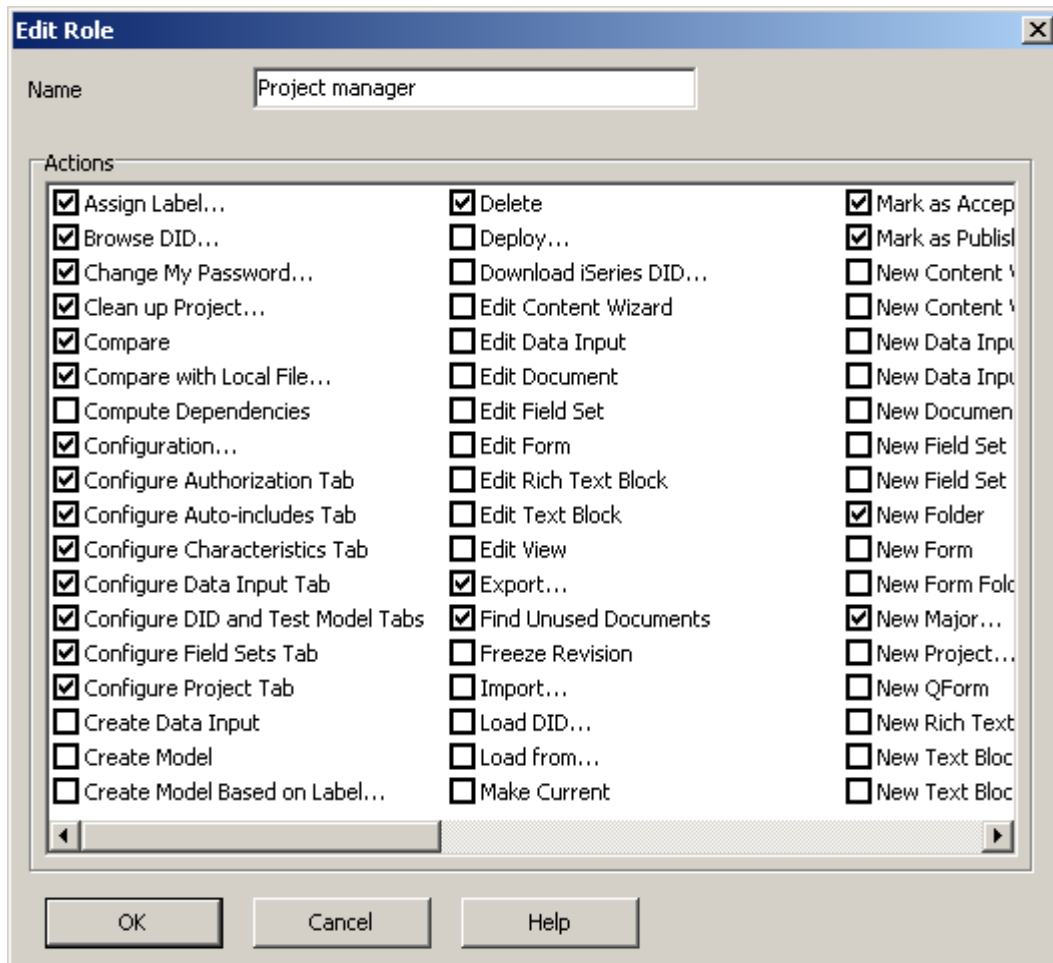
The CCM Repository uses a role-based authorization mechanism. In this, a user is assigned a number of roles, either globally, or in the context of a specific project, folder or document. A role consists of a listing of actions that the user is allowed to perform, if he has this role. These actions largely coincide with the menu actions that the CCM Repository provides. A few represent specific tabs in the Configuration dialog, thereby allowing authorization to be applied to e.g., project configuration or authorization itself.

Predefined roles

The CCM Repository creates a few standard roles upon installation. Normally, these standard roles should be sufficient for most purposes, thereby avoiding the need to create custom roles. These predefined roles can be changed or deleted.

Creating or editing roles

Only the administrator can change or create a role. To create a new role, select *New > New role...* from the File or context menu. To edit an existing role, select the Roles node in the tree view and double-click the role to edit. Alternatively, select *Edit role...* from the context menu of the role. Check the actions that you want to include in the role.



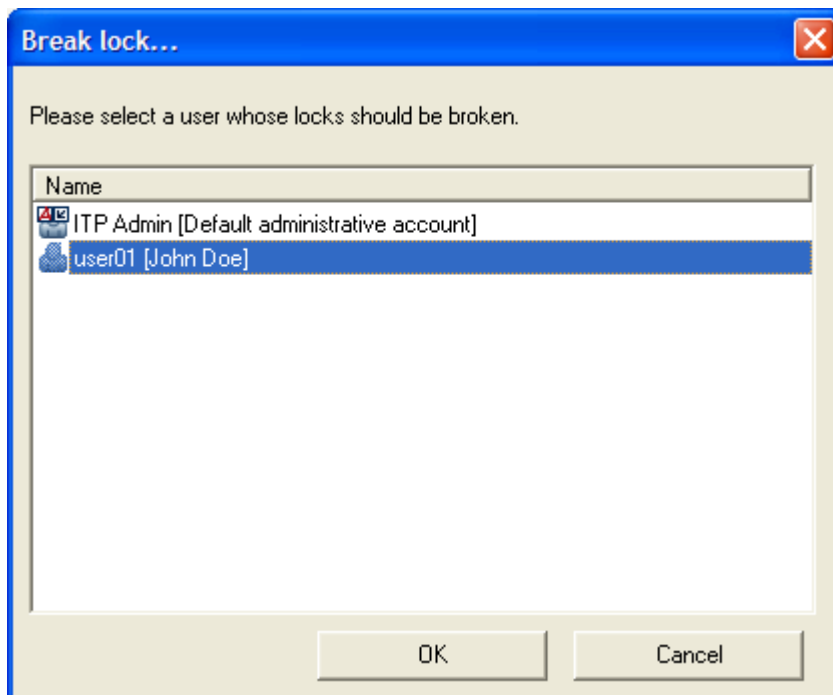
The appendix contains a list of selectable actions.

Lock breaking

A document, model, and so on, can be locked by a user. Normally, only that user can unlock the object again. If needed, also the administrator can break a lock on an object. Contrary to the normal case, the [in development] revision of the object is **not** made the [current] revision, if the lock is broken.

Break a lock on a specific object

Locate the object in the tree view or details pane. In the context menu of the object, select **Break Lock...** The lock will be removed from the object. If this **Break Lock...** action is selected on a folder or project, the CCM Repository will ask for the user whose lock should be broken. The locks of all objects in that folder, that are locked by that user, will be broken.



Break all locks of a user

Select the **Users** node in the tree view, and select **Break Lock...** in the context menu of the user account in the details view. All objects in the entire CCM Repository installation, locked by this user, will be unlocked.

Purging deleted items

Clients can delete objects. This does not mean that they actually get removed at that moment. Instead, they are marked as deleted, and hidden from the normal view. (The menu item View | Show Deleted Items displays them again.) Objects marked for deletion can be actually removed by choosing **Purge** from the File menu. Purging means that all removable items are deleted from the database. Purging is irreversible. Once an item has been purged, it cannot be recovered, except perhaps via external means such as a backup of the underlying database. To avoid that clients purge items by mistake, only the administrator is allowed to do this.

Purging will not necessarily remove all objects that are marked for deletion. Items that are somehow marked as 'useful' by the CCM Repository will not be removed. This is for example the case when a user deletes a source document, but not the model that has been created from it. The source document will not be purged until the model itself gets deleted too. The exact reasons for not purging an item can be rather intricate, so we will not elaborate on them here.

The Administrator, however, has a special sub node 'purging blocked by' that lists the objects that would prevent the revision from being purged. It may either be used by these objects, or be

configured in them (in case of folders and projects). The administrator can see this node under revisions and base objects marked for deletion, if he has enabled the option Show Deleted Items in the menu View.

Note

Every revision of a document is a complete version of that document, taking up the same amount of disk space as the original document. Deleting a revision and purging will delete that revision from the database and free up some space.

Audit log

An audit log entry is used to log some events that may be of interest to an administrator, such as failed login attempts. It can be viewed by selecting Audit log entries in the tree view.

Licenses

Only ITP Admin can enter the licenses. Refer to the [Enter licenses](#) (page 8) for details.

Set document template

ITP Admin or a user with administrative rights can set the global document template. Refer to [Set document template](#) (page 11) for details.

Set CCM Repository role

ITP Admin or a user with administrative privileges can set the CCM Repository role. Refer to [Set CCM Repository role](#) (page 12) for details.

Handle accepted revisions as published

Version 3.5.10 of the CCM Repository introduced the status [published] for object revisions. This status is used by default to determine which revisions of dynamic objects are used in a model run.

A compatibility option "Handle accepted revisions as published" was also introduced. If this option is set, the CCM Repository reverts to its previous behavior of returning [accepted] revisions for dynamic objects, instead of revisions with the new [published] status. This allows customers that already are using the [accepted] status in their processes and configuration to postpone the transition to using the [published] status. When a pre-3.5.10 version is upgraded, this option is turned on. New installations will have the option turned off.

Note

Do not to turn on the option when the status [published] on objects is already introduced. In this case, the runtime behavior of which revision will be selected for the production run is not defined.

The dialog under the Installation properties menu allows you to change the value of this option. The CCM Repository Server and Clients have to be restarted to make the change fully effective.

Note

The checked option "Handle Accepted revisions as Published revisions" even takes charge if CCM Core is configured to select runtime objects with the status published from the CCM Repository. Refer to the topic about the General tab in the Administrator's Help for more information about the configuration setting that can be used to set the status of the runtime objects that are retrieved from the CCM Repository, i.e., RepositoryObjectStatus.

Configuration

General

Both the CCM Repository Server as the CCM Repository Client uses a configuration file that can be used to do some extra configuration.

Settings are stored in the file `itprep.ini`. The client and the server have their own ini file. These files are located in the CCM Repository folders of respectively the client and the server. They can be edited with any text-editor.

Note

There are (at least) two `itprep.inis`: one for the server and one for each client.

Note

The configuration files are only read at start-up. Ergo:

Restart the CCM Repository on the client after you have edited the client configuration file.

Restart the CCM Repository Server if you have edited the server configuration file.

In normal circumstances, the configuration file is filled correctly and sufficiently by the installer program. Some fine-tuning, or changing configuration later, can be done by hand. Edit the configuration file in a plain text editor, such as Notepad.

Below, the example values given are the default values.

Syntax

Ini file sections

Options and settings are arranged in sections in the configuration file.

A section starts with the section name in square brackets on a separate line:

```
[Configuration]
```

Settings are added in 'Name=value' format.

Note

Not all settings are present in the ini file created at installation. If a setting is not present in the ini file it is set to its default.

Comment

A ; (semicolon) can be used to comment out a line in the configuration file. It must be the first character on a line.

Shared configuration

The following configuration options are valid for both client and server.

[Configuration]

```
logfile = itprep.log
logsize = 10485760
logrotate = 10
```

These set logging options. Relevant information is logged to the file specified by the log file setting.

With the logrotate setting it is possible to determine how many 'old' log files are kept (renamed to itprep.log.1, itprep.log.2 etcetera). A new log file is created every time the CCM Repository starts or when the size of the log file exceeds the value in bytes set with the logsize option.

```
language = eng
```

The screen language. Select 'eng' for English or 'nld' for Dutch. Default is English. For the client, this setting can be changed by using the Language item in the View menu. (This will only fully take effect after a restart of the CCM Repository client).

```
temppath = %TMP%
```

The folder where the CCM Repository will put temporary files. Defaults to the temp folder specified by Microsoft Windows. Another path can be specified as *c:\ <some dir>*. The CCM Repository extensively uses the temp folder. This means that there must be enough disk space available to the temp folder.

Server configuration

All required settings are configured during installation. If you do need to edit the configuration file there is an entry in the Microsoft Windows **Start** menu under Programs\CCM Repository Server called **Edit Configuration**, which will give you access to the server configuration file.

Note

Restart the CCM Repository after editing the ini file.

[Server]

In this section the port number is set used by the server to listen for requests. 2586 is the default value. Any port number below 65536 is valid.

```
[Server]
port=2586
host=<server name or IP address>
```

The 'host' value is not actually used by the CCM Repository server. It is added to the configuration file by the installer on behalf of other CCM Repository programs that may use the same configuration file.

Unified logon

Setting

```
[Configuration]
AllowUnifiedLogon=Y
```

in this section will allow the CCM Repository Client to log on the user using the Microsoft Windows' user account name. Without it, users will have to provide their user name and password.

Licenses

There are three license sections: [Base license], [Model development license], and [Text Block development license]. Normally, these are to be filled via the CCM Repository Client, by logging in as ITP Admin and selecting **License...** from the **View** menu.

The following keys occur for each of the three license sections. The values are provided by Aia Software on the license certificate. Please copy these verbatim.

```
company=
```

Given on the license certificate.

```
certificate=
```

Given on the license certificate.

```
environment=
```

Given on the license certificate.

```
date=
```

The expiration date for the license as found on the license certificate. Format: `yyyymmdd`

```
users=
```

This settings stands for the maximum number of users that can be created and be connected to the server at the same time. This number can be found on the license certificate. The administrator is not considered to be a user in terms of the license. For the base license, this value is 1.

```
key=
```

Given on the license certificate. Please copy verbatim.

[ODBC]

In this section the connection with the database is configured. The Connection String entry is set at installation.

```
connString = <connection string>
```

The connection string specifies the ODBC driver to use, the database to connect to, and various database options. Refer to the documentation of your database management system for more

information.

Alternatively, provide a Data Source Name.

```
DSN = <data source name>
```

The data source name for the database that is to store the CCM Repository data.

```
user = <user to connect to the ODBC DSN>
password = <password to connect to the ODBC DSN>
```

User and password are provided as separate settings. They do not need to be included in the connection string. This allows for encryption of the password in the configuration file.

If the password is present in the configuration file in plain text it will be encrypted the first time it is used, i.e., as soon as a connection with the database is created. You can recognize the encrypted password by its 'encrypted:' prefix. It is not possible to decrypt the password. If you want to change the database password in the configuration file replace the 'encrypted:' string with the new plain-text password. The CCM Repository will again encrypt the new password on the first run.

Note

Use a non-expiring password for the account used to connect to the database, especially when you use Client Access, because the Service used by the CCM Repository cannot become interactive. This means that when the connection tries to tell you that the password will expire, the CCM Repository will show an error and you will not be able to connect.

[Network]

This setting can be used to reduce the size of the packages sent over the network. This setting may be used if network load errors occur (which are signalled by error code 10055).

```
msgsize= <packet size in kilobytes>
```

If network load errors occur our advice is to start with a package size of 64 KB, if the problems still occur step back to 32, 16, etcetera. The default packet size limit is 512 KB.

Note

This setting must also be added to any client connecting to the CCM Repository server whose ini file you are editing.

Restart the CCM Repository after editing the ini file.

Time-outs

The time the CCM Repository takes for analyzing documents and compiling Master Templates is limited to respectively 1 minute and 15 minutes. Extremely large or complex documents may therefore encounter a timeout. These limits can be configured in the itprep.ini file of the CCM Repository service:

```
[ITP]
ConversionTimeout=60
CompilationTimeout=900
```

(Values shown are defaults.)

Increment the CompilationTimeout value if you encounter the message 'crtmdl timed out'.

Increment the ConversionTimeout value if you encounter one of the messages: 'idoc2unc timed out', 'Generation timed out', or 'Analysis timed out'.

The CCM Repository server must be restarted for these changes to have effect.

Client configuration

All required settings are configured during installation.

Close and restart the CCM Repository Client after editing the ini file.

[server]

This section contains the settings used to connect to the CCM Repository Server and contains 2 settings: host and port.

```
[Configuration]
port=2586
host=<server name or IP address>
```

The default value for 'host' is localhost. It indicates the computer on which the CCM Repository server is running.

'Port' is the TCP/IP port number used by the CCM Repository to send its requests to the CCM Repository Server. This port number should match the 'port' value is set in the [Server] setting of the CCM Repository Server ini file.

Administrator menus

Administrator File menu

The Administrator sees a different **File** menu from the users. His menu is geared to administrative tasks. The following menu items are only available to the Administrator.

New

New user

Creates a new user. The window **New User . . .** pops up. In the window **New User . . .** you must enter:

User name, which may have a maximum length of 254 characters. This will be the login name of the user. It will be most used in the CCM Repository so our advice is to enter something legible and meaningful.

Note

If spaces are the only differences in names, they are considered to be the same. It is not possible to have users with the same name.

Full name, which may have a maximum length of 79 characters. This name must be meaningful to you as user administrator because you will need it to identify users.

Password, which must have a minimum length of six characters. Enter a password of at least six characters and confirm in the confirm text box. This password in combination with the user name must be unique to the CCM Repository.

Notes

Every user, when authorized to do so, can change his own password; the administrator can reset all users passwords.

The administrator can change the login name and/or the full name of a user in that user's configuration window.

New role

Creates a new role. The new role window pops up.

Roles are the way in which authorization is managed in the CCM Repository. Each role is a bundle of permissions. You can select the permissions you want to be part of a role in the new role window. **Help** is available in the **New role** window.

Edit role

Opens a window in which Roles can be edited. Roles are the way in which authorizations are organized. Each role is a bundle of authorizations. In this window the specific authorizations of a role can be changed. Help is available in this window.

Purge

Selecting **Purge** will attempt to remove all objects from the database that are marked for deletion. Objects will not be deleted if they are somehow used by others that are not marked for deletion.

Cleanup project

This menu item comes available when a project is selected in the tree view. It allows the Administrator to free up disk space by deleting document revisions and labels from the selected project. The revisions are marked for deletion and can be restored, but labels are removed permanently. To permanently delete the labels, run the Purge command.

Note

We advice to back up your data before a clean up.

Help is available in the **Cleanup** window.

Administrator Action menu

The following items are only available to the administrator in the **Action** menu.

Break lock

If a user edits a document that document is locked. This means that no one else can edit this document. To prevent deadlocks an administrator can break all locks. When he does the in development revisions of the locking users will be turned into revisions but the current revision will remain the same. In other words work is saved but the current marker is not moved to it. This means that if a document is edited after its lock has been broken the revision before last (the current revision when it was locked) will be opened. This menu item is only available to the administrator.

Change user password

It opens the window **Change user password <selected user>**. A password of a specific user can be altered by selecting the user under **Users** in the tree view and selecting this menu item or by right-clicking on that user and choosing **Change user password**. The new password must be entered twice. A password must be at least six positions long.

Only ITP Admin or users with administrative rights are allowed change the passwords of all users.

Change Document Template

With this item the path to the Document template used by the ITP/Model Development Kit to create documents can be set in the CCM Repository. Any template file can be selected. With the CCM Repository Server installation the template repository.dot is placed in the install folder. We recommend using this template to start with because it contains the ITP/Model Development Kit Style bar. It can be altered as you see fit. The template needs to be copied to a network location accessible for all CCM Repository Clients before a path to it is set.

When a path is set only dot files are accepted and some content checking is performed.

Note

The file is not stored in the CCM Repository, only the path to it is.

Note

By default no path is set and all new documents are therefore based on the local 'normal.dot' of the client.

Installation properties

This action displays a dialog allowing you to set some system-wide properties of the CCM Repository installation. This includes:

- The revision number postfix and other identifying information. Refer to [Set CCM Repository role](#) (page 12) for more information.
- The compatibility option "Handle accepted revisions as published". Refer to [Handle accepted revisions as published](#) (page 23) for more information.

Administrator Report menu

The reports described in this chapter are all available reports. The **Report** menu allows you to generate reports of the content of the CCM Repository. These reports are implemented as ITP models. There are a number of predefined reports made with models that can be viewed in the project Repository Reports. All of these objects are owned by Aia. This means that you can create revision for them but you cannot delete them. You can however add your own reports. When you do they will appear in the Reports menu when you start a new CCM Repository browser window. Refer to the separate reports development guide for more information.

User authorization

This is an administrator-only report. It will list all roles of a selected user in all projects.

Administrator View menu

The following items are only available to the administrator in the **View** menu.

License...

This menu item opens the window **License information**. In this window the license can be edited.

Sessions...

This menu item opens the window **Active sessions**. All current sessions are listed in this window by address and name. A session can be terminated by selecting it and clicking the button **Disconnect**.

This feature can be used to free sessions of crashed clients.

Administrator tools

Repdump/reload

It is also possible to write the complete CCM Repository database to a file. This is done with a tool called repdump. To read this file in another database the tool reload is used.

Please note that this functionality is primarily intended to be used as a means to migrate the database to a different DBMS. It is not intended as a document life-cycle support mechanism. It can, however, be used to make a safety duplicate (back-up) of the database.

Note

The dumping CCM Repository version must be the same as the loading CCM Repository version.

Repdump.exe: exporting the CCM Repository database

Repdump.exe must be run on the server that runs the CCM Repository. It is installed in the root of the ITP/Model Development Kit Server installation and it must not be moved since it needs the Server Initialisation file that is located in that folder.

Repdump is used from the Command Line and takes just one parameter, i.e. the path/name of the file it will export the CCM Repository database to. If no path is provided the file will be written in the current folder.

Repdump writes a log, Repdump.log that can be found in the folder it is installed in.

```
Repdump "path\database dumpfile name"
```

Reload.exe: loading an exported database

Reload must be run on the server that runs the CCM Repository. It is installed in the root of the ITP/Model Development Kit Server installation and it must not be moved since it needs the Server Initialisation file that is located in that folder.

Use of reload.exe

Start the upload process by creating a new database or selecting an existing database that can be emptied and refilled. To load a file, the CCM Repository needs to be stopped. Stop the CCM Repository by selecting **Stop server** from the CCM Repository **Start** menu. Reload needs to be called from the ITP/Model Development Kit **Server root folder**, the folder where the itprep.ini is located as well. Reload takes just one parameter, the path/name of the file made with the Repdump tool.

If an existing database is used the flag -cleardatabase can be used to empty the database before loading the file. Note that it is not possible to add the content of a CCM Repository database dump file to the content of an existing CCM Repository database, reload will either use an empty database or replace the content of an existing one.

Note

Using -cleardatabase means that all content in the database of the loading CCM Repository will be destroyed. Use with care.

```
Repload "path\dumped file name" <-cleardatabase>
```

Repload.exe Log

Repload will write a log with the name Repload.log in the folder it resides in.

Database not empty error

If you started a client before using repload you will encounter an error because the database is no longer empty. The start of a client initiates the configuration of the database rendering it not empty. If you do encounter that error you can use the -cleardatabase flag with repload to empty the database before loading.

New database

The CCM Repository can use any multi-user database that can be created and controlled with ODBC.

It is also possible to change the database the CCM Repository is using. All you need is a new database and a connection string to connect to it.

Please refer to the Installation Guide for information on creating a database and a connection string or DSN.

Configure the CCM Repository

The new database must still be configured on the CCM Repository server. Choose **Edit Configuration** from the menu item **ITPMDK Repository Server** in the **Microsoft Windows Start** menu.

This will open the itprep.ini file in a text editor.

The entry that need to be changed is the [ODBC] entry. This entry looks something like this:

```
[ODBC]
ConnString=<connection string>
user=<db user>
password=<db user password>
```

The values after (=) must be changed. Provide a connection string for the new database after ConnString=. Also change the database user name and password if necessary.

Instead of a connection string you can also create a Data Source Name for the new database and configure that. Use the setting:

```
[ODBC]
DSN=<data source name>
```

Restart the Server

The next step is to restart the Server. This is done in 2 steps: stop the Server (if not already done so) and start the Server. Both commands can be found in the **Microsoft Windows Start menu > Programs > ITPMDK Repository Server**.

Initializing database and uploading Reports

The final step is to prepare the database and to upload the Reports. Reports are part of the functionality of the CCM Repository that is implemented as a project and as such they need to be

uploaded to the new database.

The cvc tool is used to do both database initialization and reports loading.

Uploading in steps:

- Start a command line prompt
- Change folder to the folder where you installed the ITP/Model Development Kit Server
- Run the following command:

```
cvc reportsdump
```

Note

that you can only see reports if one of your roles allows you to. If you do not see any reports, or only some reports, check your authorization.

After this step you can open a client and start working in the new database.

Backups

Be aware that the database attached to CCM Repository contains important production data. Make sure that it is backed up on a regular basis.

Interface translation table

It is possible to set the screen language to Dutch. In order to be able to use this English manual a translation table of the terms used in the interface is provided below.

English	Dutch
About...	Info...
Action	Actie
Authorization	Autorisatie
Break lock...	Vrijmaken...
Change Document Template...	Wijzig Document Sjabloon...
Change my password...	Mijn wachtwoord wijzigen...
Change user password...	Gebruikers wachtwoord wijzigen...
Cleanup project...	Project opruimen...
Clear	Wis
Close	Sluiten
Close browser	Sluit venster
Configuration...	Configuratie...
Configure authorization tab	Configureer autorisatie tab
Configure project tab	Configureer project tab
Configure DID/CC tab	Configureer DID/CC tab
Configure characteristics tab	Configureer kenmerken tab
Configure auto-includes tab	Configureer auto-includes tab
Configure field sets tab	Configureer VeldenSets tab
Copy	Kopiëren
Cut	Knippen
Delete	Verwijderen
Deploy...	Uitrollen...
Edit role...	Wijzig rol...
Exit	Afsluiten
File	Bestand
Help	Hulp
Language	Taal
License...	Licentie...

English	Dutch
Locked by...	Onderhanden bij...
Login	Aanmelden
New role...	Nieuwe rol...
New user...	Nieuwe gebruiker...
Open	Openen
Paste	Plakken
Purge	Definitief verwijderen
Refresh	Vernieuwen
Report	Rapport
Restore	Herstellen
Roles	Rollen
Select	Kies
Select All	Alles selecteren
Select Document Template	Selecteer Document Sjabloon
Sessions...	Sessies...
Set description...	Beschrijving wijzigen...
Show deleted items	Toon verwijderde items
Show details	Toon details
View my changes	Mijn wijzigingen bekijken

Appendix

Roles list the actions that the role gives access to. Most actions are normal menu items, and are explained in the user's manual. The following actions, however, are not menu items, and are explained here.

Configuration

Permission to edit the configuration of objects in the CCM Repository. This permission gives access to the **Configuration** window of an object.

Initially all that can be changed with this permission are the name and the description (in other words, the **General** tab of the **Configuration** window). The next permissions determine which of the other tabs of the **Configuration** window will be shown.

Note

The Configuration permission is needed for the Configure authorization, Configure auto-includes, Configure characteristics, Configure DID/CC, Configure field set and Configure project permissions. This permission implicitly allows a user to rename objects.

Note

A user whose roles have been changed must log out and log on for the change to take full effect.

Note

The **General** tab will be hidden for users that don't have permission to edit the tab.

Configure Authorization tab

The permission **Configuration** is needed for this permission to have an effect.

Permission to assign and revoke roles. When granted this permission the **Authorization** tab will be shown in the **Configuration** window. A user who has this permission cannot create roles, nor can he change the permissions contained in a role, but he can assign users to roles in a project or projects.

Note

A user whose roles have been changed must log out and log on for the change to take full effect.

Note

The **Authorization** tab will be hidden for users that don't have permission to edit the tab.

The permission **Configuration** is needed for this permission to have an effect.

Permissions to add and remove Field Sets from a Forms folder or a Text Block folder. In case of a Forms folder also permission to add and remove Views from the Forms folder.

Configure Characteristics tab

The permission **Configuration** is needed for this permission to have an effect. Permission to set characteristics for a project. This permission will show the **Characteristics** tab in the **Configuration** window.

Note

A user whose roles have been changed must log out and log on for the change to take full effect.

Note

The **Characterics** tab will be hidden for users that don't have permission to edit the tab.

Configure DID/CC and Style document tabs

The permission **Configuration** is needed for this permission to have an effect. Permission to set the DID and Connection Configuration for a project or folder as well as the Style Document. This permission will show the tabs **DID/CC** and **Style Document** in the configuration window of a project or a folder.

Note

A user whose roles have been changed must log out and log on for the change to take full effect.

Note

The **DID/CC** and **Style Document** tabs will be hidden for users that don't have permission to edit these tabs.

Configure Fields Set tab

The permission **Configuration** is needed for this permission to have an effect. Permissions to configure Field Sets on a Forms folder or Text Block folder.

Configure Project tab

The permission **Configuration** is needed for this permission to have an effect. This setting is the permission to configure a project. When this permission is granted the tab **Project** is visible in the **Configuration** window.

Note

A user whose roles have been changed must log out and log on for the change to take full effect.

Note

The **Project** tab will be hidden for users that don't have permission to edit the tab.

Cut

Permission to move a document from one project to another.

The permission to **Paste** is linked to the permission to **Cut**: when a user has the permission to **Cut** he can also **Paste**. The permission to **Paste** is not limited to any one project. In other words, a user can move a '**Cut**' document to any project in the CCM Repository.