Arbutus WebConnect

USER GUIDE

ARBUTUS

Drive Your Analytics

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About this Guide

This guide is provided to licensed users of Arbutus WebConnect to provide quick instructions on connecting and using it.

For more information about our products and services, visit our web site at:

www.ArbutusSoftware.com

Need Help?

Contacting Us

If you have suggestions for improvements or if you can not find a solution to a problem, you can contact technical support for assistance. Please include:

- Your Arbutus Analyzer serial number.
- A description of what you were doing when the problem occurred.
- The error message, if any enountered.

Support Center

Global Help Desk

- Phone: +1-604-437-7873 or +1-877-333-6336 ext. 333
- Fax: +1-604-437-7872
- E-mail: support@ArbutusSoftware.com

Or write to us at:

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CHAPTER 1 ADMINISTRATORS - CONFIGURING ARBUTUS WEBCONNECT

Logging In

Navigate to the hostname/IP of the Webconnect website with "admin" as the sub URL path. For example:

```
http://webconnect_demo.com/admin/
```

The authentication details for administration default to a username of 'admin' and a password of 'adminpassword'

After successfully logging in you will be redirected to the administration section of WebConnect, where you, as the administrator of WebConnect, provide the necessary meta data required for WebConnect and its users to successfully communicate with the commissioned WebApp Server.

Configuration

These are the primary configuration sections that are required to be populated with relevant data:

- Global configs
- Server profiles
- Shared folders
- User profiles
- Variable descriptions

All of these sections can be added to, edited or deleted. 'Global configs' is a special case in that there is only ever one instance (record) that can be edited.

Global Configurations

You must add a Global Configuration model and save it, even if you do not require modifying any of the available default options.

User Prepended Prefix

The first item to be edited in the 'Global configs' section is the User Prepended Prefix – this specifies a an optional default prepended prefix that can be used as the default prefix for all users. The advantage of this prefix is that it requires very little user specific setup, and makes WebConnect available quickly to users with just some minor folder setup conventions on the server file system. For example, as the administrator, if you specify a prepended prefix of 'C:\tmp' then all users will by default inherit a user prefix of 'C:\tmp\<username>', where <username> is the username used for authentication. The only prerequisite of this is that you

have in advance created all the necessary folders with appropriate permissions on the server. For example, using our example of a User Prepended Prefix of "C:\tmp":

```
C:\tmp\dewey
C:\tmp\huey
C:\tmp\louie
```

Where dewey, huey and louie are usernames that will be authenticating with WebConnect.

Corporate Logo

WebConnect allows the option to upload and display your corporate logo centered on WebConnect's web pages. Simply click Choose File to select the logo image to be displayed.

Show Data Tables

This option shows tables in the users shared folder. By default this is set on. Turn off if you do not want to display tables.

Show Private Folders

This option displays the users private shared folder. By default this is set on. Turn of if you do not want to display the users private shared folder.

Users

The Users section should be edited to specify the list of active directory users who will access the specified server profiles and the related content (table and procedures) when logged into WebConnect.

If an active directory user does not exist, you can create them by clicking the '+' icon. The created user can then be added to have access to specified server profiles.

Note:You can hold the CTRL key to mass select and associate multiple users to the specified server profile.

User Details

- Server Type – the list of supported Arbutus Server types. Select the appropriate platform type where your Arbutus Server is installed.
- Name – the server profile name label for the specified Arbutus Server.
- Port – the port number that the specified Arbutus Server is listening on for connections
- Timeout – the number of seconds that Arbutus Server will be idle before timing out

- Encryption – the level of encryption for data sent between WebConnect and Arbutus Server.
- Compression – the level of compression for data sent between WebConnect and Arbutus Server.
- WebApp server – see comments above, only one WebApp server can be designated at a time.

Server Profiles

The 'Server profiles' section should be edited to:

- specify the users for the server profile
- specify the default 'Webapp Server' for communication with WebConnect.
- specify the server profiles that WebConnect uses to communicate with any Arbutus servers that are referenced in your procedures.
- allow necessary server profiles to populate an internal server profiles file

Note:Currently, only one 'WebApp server' can be specified at this time. In a future release, we may support multiple WebApp servers being made available to WebConnect.

ODBC Profiles

The "ODBC profiles" section should be edited to:

- specify the DSN name
- specify the username
- specify the password
- specify the server profile (i.e. identify the location of the Arbutus Hub Server) for the specified DSN

Shared Folders

The Shared Folders section lists all shared folders that are located on the WebApp Server that an Arbutus Server and its users are associated. This is typically common folder locations shared among many users, or it could be restricted to a sub-group of users.

From the users perspective, the shared folders will dictate what the user will see in the left hand tree view when they log into WebConnect. As long as all users associated with the shared folder have the correct file permissions, they will see all folders, tables and procedures contained within each shared folder.

When selected:

- tables will be viewable in a scrollable grid view
- procedures will display an explanatory note (if any) on running the procedure and any required inputs, plus text boxes to enter any required vari-

ables (and to display any previously assigned values). Users can accept the pre-assigned values (if any) or enter relevant values

- procedures can be run by highlighting the procedure name and clicking the RUN button on the bottom of the left hand tree view

Shared Folder Details

- Users – a list of active directory users who will see this shared folder and its contents when logging into WebConnect. If an active directory user does not exist, you can create them by clicking the '+' icon. The created user can then be added to have access to specified server profiles.

  Note:You can hold the CTRL key to mass select and associate multiple users to the specified shared folder.

- Name – is the label that will be displayed in WebConnect for this shared folder

- Path – is the physical file path on the specified Arbutus Server

- Default – If selected, all newly added users will have this shared folder automatically associated with them

- Server Profile - displays selected server profile, allows choice of server profile and allows addition of new server profile. Also allows user to edit existing server profile.

Variable Descriptions

The variable descriptions section lists all global variable names that are made available to all assigned users and can be referenced in procedures run by users. Variables can be added and default values edited. When running a procedure, users can change a variables value as needed. Variables will display their prior values to aid efficiency.

Variable Details

- Column name – is not editable and is automatically assigned by WebConnect

- Column description – is the label for the variable and how it is to referenced within procedures

- Column title - is an optional descriptive title to display in place of the column description

- User editable – defaults to ON. When set to ON, the user is able to change this value when they select the procedure in WebConnect. If set OFF, they are unable to edit the variables value that was assigned by the administrator

- User viewable – defaults to ON. If set ON, the user is able to view this value when they select the procedure in WebConnect. If set OFF, they are unable to view it or edit the variables value that was assigned by the administrator
- Batches: If list is empty, all procedures will have access to this variable. If a procedure or list of procedures (separated by commas) are entered then ONLY those specified procedures will have access to this variable

There is also a special internal variable that can be referenced in procedures without being added to the variable descriptions shown below. It is called 'user_prefix' and is automatically populated from the value entered in the user profile prefix - see "User Profile Details" on page 5 for more details.

This allows you convenient access to each users output prefix value without having to set it up again in variable descriptions.

A common situation when you might want to use this variable is where the Notify command is used in a procedure and you need to specify the full attachment path for an output file, perhaps an exported file, that has been saved to the users output prefix folder.

```
ASSIGN attachment_path=user_prefix+"\EXCELFILE.XLSX"

NOTIFY SENDER "AUser@arbutussoftware.com" MAILBOX "localhost" PORT 25
ADDRESS "%batch_address%" SUBJECT "%batch_subject%" MESSAGE "%batch_
message%" ATTACHMENT "%attachment_path%"
```

User Profiles

The User Profiles section lists all valid users. Users can be added to this list or their information edited.

A user will automatically be added to the user profile section if they successfully authenticate with the Arbutus Hub Server. Once authenticated, a user will be able to see any default Shared Folders they have been granted access to by the administrator.

The administrator can also manually add users in advance of them logging into the WebConnect system successfully for the first time. This would allow the administrator to setup a customized shared folder and environment for them before they login.

User Profile Details

- Username – must be the exact same username that is their Active Directory Windows Server login. This is either entered upfront by the administrator or will be automatically populated if the user has already successfully logged in.
- Prefix – the private folder on the Arbutus Hub Server where all output from procedures run by the user will be placed by default. This is the user's private sandbox.

> *Note:If the admin has previously setup the Global configs with a prepended prefix, this value can remain blank. However if you want more granular control over each users private folders, the administrator can specify a private folder prefix here and it will be used instead.*

- The remaining items are a list of variables and their corresponding values that the user has permission to view and/or edit.

Setting up the Arbutus Server

For more detailed information on establishing Server Profiles for users and setting up Enterprise Shared Folders, see the following associated documentation:

- Analyzer Help
- Analyzer Installation Guide
- Arbutus Hub Server Installation Guide

Setting up Procedures (Scripts) For Use in WebConnect

There are some basic steps in setting up procedures (scripts) for use in WebConnect.

Adding User Variables To Procedures

Once you have established the variable inputs that are to be provided to the users (editable or not), these variable names must be referenced in the procedure for their values to be utilized. So the administrator must edit the procedures that are to use these variables and substitute in the variable names directly or via macro susbtitution as required to enable their usage.

It is important to note that the use of variable inputs is the intended best practice for user input in WebConnect.

Configuring A Single Simple Dialog Command In Procedures

Use of a single simplified Dialog command is allowed in WebConnect but is not a best practice. User Variables are the recommended best practice for user input.

Procedures in Web Connect are treated like scheduled jobs, so though a single simplified Dialog command is supported in a procedure, the Dialog command must be at the top of the procedure surrounded by Schedule Start and Schedule End commands - see the Analyzer Help for specific details.

> *Note:Accept and Pause commands are not supported in WebConnect scripts. These commands must be removed from any scripts you intend to use in WebConnect.*

CHAPTER 2 END-USERS - WORKING WITH ARBUTUS WEBCONNECT

Connecting to Arbutus WebConnect

Please contact your WebConnect administrator to obtain the web address for your Arbutus WebConnect server login.

This will normally be in the form:

```
www.yourdomain.com
```

or in the form:

```
www.yourdomain.com:xxxx
```

(where xxxx is the port number on the server).

When you enter this web address you will automatically be redirected to the WebConnect server Login page.

Once you are on the Login page you will be asked to login to WebConnect. You do this using your standard Active Directory user ID and password. If your login information is not correct you will be presented with an error message. You will not be able to proceed to a WebConnect session without a correct login.

Using Arbutus WebConnect

Once logged in you will be presented with the WebConnect session panel. This panel is broken into two main sections:

- On the left side is a tree view showing all of the folders, tables and scripts you have access to. Above this is a Search box, and below this is a Run button. (more detail on this below).
- On the right side is a larger area, which will display a portion of the selected table contents, or provide information to you about the selected script.

To expand or collapse a folder, just single click on the triangle to the left of the folder.

To select a script or table just single click on it.

Scripts

Scripts can prompt users for input in two ways (input variables or a single simple dialog command). Once entered, the script is run and results are generated (either an email is sent with results or a table is created that can be viewed in WebConnect).

Using Input Variables

When you select a script, the right side of the WebConnect session panel will show the input parameters for this script, together with the script's note. This note will typically give you instructions about the purpose of the script and information regarding entry of any required input parameters.

Some of these input parameters may be disabled. If this is the case then it is an input to the script that you are allowed to see, but not change. If an input value seems incorrect to you then you should contact your WebConnect administrator. If you have run this script before, then the input parameters will display the values from the last time you ran the script.

If you want to run the script, then complete the editable input parameters and press the Run button. You will immediately see a notice that the selected script has been submitted.

All input parameters will be stored as named variables that are used/referenced within the procedure.

> Note:Results will appear when the procedure completes - timing will vary based on the size of the data being processed, the complexity of the analytics being performed, and may also be affected by internal delays with your network and/or your e-mail server.

Using a Dialog Command

WebConnect is designed to be run optimally (as a best practice) using the variable inputs described above.

In addition to the on-screen input parameters, WebConnect also supports use of a single simplified user dialog in a script that prompts users for basic input. Currently, WebConnect treats scripts like scheduled jobs in Analyzer where the single user dialog occurs as the first command in a script surrounded with Schedule Start and Schedule End commands - see the Analyzer Help for more details. Any inputs to a Dialog command will not be remembered from the last time you ran the script.

> Note:Accept and Pause commands are not supported in WebConnect scripts. Only a single simplified Dialog command can be used.

Failure To Provide Necessary Inputs

If users fail to supply the requested input, or fail to input the data correctly (for instance, enter a date value using the wrong date format), the administrator will most likely have set up the script to validate all requested inputs and will send the user an e-mail indicating the script could not be run as the required inputs were invalid (i.e. missing or faulty).

Generating Results

Scripts will generally produce results in one of two ways:

- Emailed results will be automatically sent at the completion of the script, most typically as an attached file (like Excel). In this case, your email address is usually one of the script's required and remembered parameters.

   Note:If you don't see the sent e-mail in your e-mail software after a reasonable amount of time (this may vary depending on the run time of the chosen script), check your Junk e-mail folder. You may need to configure your e-mail to accept the sent e-mail from WebConnect via your e-mail server.

- Output tables will usually be created in your Private folder. Once you submit the script, give the script sufficient time to complete and then refresh your browser. Once the script has completed you can review the results by expanding your Private folder and selecting the appropriate table.

Tables

When you select a table, the right side of the WebConnect session panel will show some or all of the table. As tables are often very large, it is not always possible to view very large tables on a single page.

- If the table is small, then the entire contents will be shown.
- If the table is large, then you can use the vertical scroll bar to look at the first portion of the file (typically 100-1000 records).
- If you scroll all the way to the bottom of the vertical scroll bar, then the next portion of the table will automatically be loaded. You will see the record numbers change.
- If you are not at the top of the table and you move the vertical scroll bar to the top, then data from earlier in the table will automatically be loaded.

Exporting a Table

Above the table grid, WebConnect offers a button you can click to "Export to Excel". This option assumes you have Excel installed on your local machine and will export all of the data in the table to an Excel spreadsheet.

This option is meant for exporting a manageable number of records. If the table to be exported is very large, exporting to Excel make take a long time as WebConnect has to load the entire set of records prior to performing the export to Excel. In addition, depending on the limitations of the Web browser being used, when exporting large files to Excel, the Web browser may not allow all of the records can be exported. Always check the resulting exported table to ensure all intended records were exported.

For large files, as an alternative, we recommend you modify the script that creates the table to use the Export command to export the data to Excel and then use the Notify command to send the exported spreadsheet as an attachment to those who need it.

Folders

The folders shown in the display area are those folders that the network administrator has indicated your Active Directory account is authorized to use. If you don't see a folder you need, then please contact your network administrator.

Searching Folders for Scripts and Tables

Sometimes there are more available folders, scripts and/or tables than will conveniently fit on the screen.

Rather than having to navigate through a number of folders to locate the item you require, you can use the Search box to quickly select your item. Just start typing any portion of the name, and as you type the tree will shrink to show only those items that match.

For example, if you wanted to run the script "Even_Dollar_Invoices", then typing "dol" in the search box may be sufficient for it to be located and displayed on the page.