

## **Chapter 17 - TRIM WebDrawer**

### **Introduction**

WebDrawer uses Internet technology (TCP/IP, HTTP) to deliver TRIM database content across a computer network. Web based access to TRIM allows existing users of a TRIM database to access TRIM record data from any web browser enabled computer.

### **Overview**

Through WebDrawer, users can access a TRIM database using a web browser. Most web browsers are compatible with WebDrawer e.g. Netscape Navigator™, Microsoft® Internet Explorer etc. The WebDrawer server interprets requests from the browser and acts as an intermediary transferring data between the user and the TRIM database. Using WebDrawer, users have the ability to search, browse, retrieve, view, request and complete actions on records in the TRIM database.

## **WebDrawer User Guide**

### **Database security in WebDrawer**

Access to a TRIM database through the WebDrawer server is controlled by the same security systems as a normal TRIM database. Users logged in to the TRIM database through WebDrawer are subjected to all the existing security filters, levels, caveats and group access controls.

### **Templates**

The WebDrawer server uses configurable templates to return data to your web browser. Your WebDrawer administrator may have altered the templates supplied by TOWER Software so they may not look the same as the screenshots in this help topic.

## **Using WebDrawer**

### **To log on to the TRIM database through WebDrawer**

Start your web browser

Type the address of the WebDrawer server into the address bar of your web browser. Your WebDrawer administrator will supply the address of the WebDrawer server to you.

After entering the address, your web browser connects to the WebDrawer search page.

When you perform the first search of the database, you may be asked to enter your TRIM database user name and password. Entering both gives you access to the TRIM database.

## Searching a TRIM database through WebDrawer

**TRIM**  
CAPTURA

**TRIM WebDrawer Power Search**

Search for:                      Equal To:

Title Words                      [ ]

[ ]                                      [ ]

[ ]                                      [ ]

All must match (AND)

Any matches (OR)

Do Search    Start Again

Quick Search

[ ]

Search

[Help](#)

[Start Again](#)

[System Status](#)

Copyright © 1999 TOWER Software Engineering Pty. Ltd. All rights reserved. Comments to [WebMaster](#)

The HTML search pages provided with the WebDrawer server provide three methods of searching a TRIM database, a quick search, a simple search and an advanced search. Your WebDrawer administrator may have altered these templates to allow you to search in a different manner. If your interface differs significantly from that shown in this help file check with your administrator for instructions on how to search the WebDrawer server.

Searches are made by selecting a search method from the **search for** list, and typing the text to search for in the **equal to** text box.

By default the quick search method searches for records by their title words. For the other searches you need to select the method as well as type the text you want to search for.

### Quick searches

Quick search searches by words from the titles of all the records in the TRIM database.

#### To search the TRIM database using quick search

- Type the title word or words to search for in the quick search text box
- Click Search

A list of records matching your search terms is displayed.

### Simple searches

A simple search searches the TRIM database using the power search section of the search screen and a single search method.

#### To search the TRIM database using a simple search

- In the search for list, click on the drop-down button to select the search method
- Type the text you wish to search for in the equal to text box
- Click Do Search

A list of records matching your search terms is displayed.

### Advanced searches

Advanced searches combine multiple search methods and search text. This is achieved by using the AND and OR options on the power search section of the search screen.

#### To search the TRIM database using an advanced search

- In the search for list click on the drop-down button to select the search method. You may enter up to three types of search method in the standard search template supplied with WebDrawer.
- For each search method you select, type the text you wish to search for in the equal to text box.
- Click AND if the results of the search must contain all of the search terms you choose
- Click OR if you would like to display records which contain at least one of the search terms you choose
- Click Do Search

A list of records matching your search terms is displayed.

### Notes on searching

Description of available search methods

The search for list contains the following search methods:

| Search Method       | Result                                                                               |
|---------------------|--------------------------------------------------------------------------------------|
| Title Word          | Searches for records by the specified title word.                                    |
| Notes Word          | Searches for records by the specified notes word.                                    |
| Document Content    | Searches for records by words in associated documents                                |
| Date Created        | Searches for records by the specified date created.                                  |
| Record Number       | Searches for records by the specified record number.                                 |
| Actions by location | Searches for records by the specified location, and returns the actions in progress. |
| Container Number    | Searches for records by the specified container number.                              |
| Date Created        | Searches for records by the specified date created.                                  |
| Date Registered     | Searches for records by the specified date registered.                               |
| Date Modified       | Searches for records by the specified date modified.                                 |
| Contact             | Searches for records by the specified contact.                                       |
| Thesaurus Term      | Searches for records by the specified thesaurus                                      |

| Search Method       | Result                                                                                                                      |
|---------------------|-----------------------------------------------------------------------------------------------------------------------------|
|                     | term.                                                                                                                       |
| Record Plan Number  | Searches for records by the specified record plan number.                                                                   |
| Record Number Range | Searches for records by the specified record number. Record Number Range searches are done on expanded record numbers only. |
| External Reference  | Searches for records by the specified external reference.                                                                   |
| Current Location    | Searches for records by the specified current location.                                                                     |
| Home Location       | Searches for records by the specified home location.                                                                        |
| Owner Location      | Searches for records by the specified owner.                                                                                |

### Searching by range

Some types of search allow you to search by ranges. Use a semicolon (;) or a comma (,) to designate a range of values:

*For example searching for 7/22/99 , 8/22/99 is the same as 7/22/99 ; 8/22/99. This search returns all the records in the range including the dates specified.*

### Searching by date

When you search the TRIM database for dates or date ranges the WebDrawer server only recognizes dates which match its own date format.

*For instance if the date format used by the WebDrawer server is MMM-dd-yy, a search using mm/dd/yy will return the correct values, however a search for dd/mm/yy will not. If you have doubts about the date format that your WebDrawer server is using, ask your WebDrawer administrator.*

### Saving search criteria

After performing a successful search it is possible to save the search as a bookmark. When you reload this bookmark in your Web browser the WebDrawer server will perform the search and return the search results as if you had entered the search from the search page.

### Browsing Results

When the results of a search are displayed, use the links embedded in the page to browse for more information.

| Record Search Results                                                                                                                                                                      |                              | Page 1 - <a href="#">Next</a>    |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------|----------------------------------|
| <b>"reef" in Record Title</b>                                                                                                                                                              |                              |                                  |
| <b>RP96/3</b>                                                                                                                                                                              | <b>RESEARCH PROJECT FILE</b> | <b><a href="#">more info</a></b> |
| RESEARCH PROJECT - MARINE ANIMALS - Project [Terminator II] - Study into Potential Impacts of Fishing on the Social and Territorial Behaviour of Two Predatory Reef Fish at Orpheus Island |                              |                                  |

For example, a successful search may return multiple pages of records. To check the next page of records click the [Next](#) link at the top of the page, or to view more information on a particular record click the [more info](#) link.

### Working with records

Once you have found the record you were searching for, use WebDrawer to view, request or complete actions associated with it.

### Viewing electronic documents

|                                                 |                                               |                           |
|-------------------------------------------------|-----------------------------------------------|---------------------------|
| SM98/295                                        | <a href="#">Sales and Marketing Documents</a> | <a href="#">more info</a> |
| Benefits of an Electronic Record Keeping System |                                               |                           |

#### To view an electronic document or file

- Click on the record title to download the record.

A viewed document can only be displayed, WebDrawer does not update the TRIM database, or change the location of the file when you view it via WebDrawer. You cannot return edited documents to the TRIM database through the WebDrawer interface.

### Making record requests

|                         |                                                                           |
|-------------------------|---------------------------------------------------------------------------|
| <b>Locations</b>        |                                                                           |
| <b>Home Location</b>    |                                                                           |
| <b>Owner Location</b>   | <a href="#">Administrator</a>                                             |
| <b>Current Location</b> | <a href="#">Operations</a>                                                |
| <b>Movement History</b> | Thursday, 27 May 1999 16:00:01 Administrator                              |
| <b>Requests</b>         | <b>Click <a href="#">Here</a> to place a request for this FOLDER BOX.</b> |

A record request is a request to change the physical location of a record. The relocation of the record is usually made to the person making the request, e.g. you might request a folder box stored in operations to be transferred to you.

Record requests can be made through WebDrawer. Your organizations own internal procedures will determine how a record request is processed.

#### To make a record request

- Display the record details of the record you wish to request
- Click the request link found in the location section of the record details.

Note: Document requests made though the WebDrawer server use the current date and time on the server when making the document request.

## **Completing current actions**

If a TRIM workflow action has been assigned to you. It is possible to register the completion of that action through the WebDrawer interface.

### **To complete an action**

- Display the record details of the record containing the action assigned to you.
- Click the complete action link found in the workflow section of the record details.

## **Trouble shooting**

### **My web browser cannot find the WebDrawer server**

Ensure that you have the appropriate Internet software and TCP/IP protocols installed.

Ensure the WebDrawer server is operating.

Ensure you have entered the correct address in the address bar of your browser.

### **My web browser cannot view electronic documents**

Make sure the appropriate software application or plugins have been installed in your browser.

If your browser cannot view a downloaded document then your browser may prompt you to save the file to disk. Save the file and then use the appropriate viewer to view the file. For more information on saving and viewing documents through your web browser please consult your web browser documentation.

### **Maximum number of users exceeded**

If the WebDrawer server returns a message stating the maximum number of users has been exceeded then you will have to wait until other users log off the system before trying to access WebDrawer again. The maximum number of users who can be connected to the WebDrawer server is set by your WebDrawer administrator, and is limited to prevent excessive slowdown when accessing the TRIM database through the web.

### **Date searches**

If your searches on dates fail or return incorrect records check with your WebDrawer administrator to see what date format the WebDrawer server is using. The WebDrawer server will only understand dates in the correct order i.e. mm/dd/yy or dd/mm/yy etc.

## **WebDrawer Administrators guide**

### **Introduction**

WebDrawer is composed of three parts. The TRIM database, the WebDrawer server and templates, and the client browser. The WebDrawer server acts as an intermediary, transferring requests from the browser to the database and then returning the results via the templates to the browser for display.

This section describes the operation and administrative requirements for installing and running the TRIM WebDrawer server, and for creating and modifying the template files.

## System requirements

The WebDrawer system requires:

### Server

A computer running Microsoft Windows NT 4.0 Advanced Server.

- TRIM version 4.3 or higher
- Validated Third Party Database (RDBMS), WebDrawer does not support ISAM Databases

To use a RDBMS you will require an ODBC driver that supports multithreading. The following validated third party databases (RDBMS) have been validated for use with WebDrawer:

- IBM DB2 UDB 5.x
- Oracle 8.x
- Microsoft SQL Server 7.x
- A connection to a TCP/IP network capable of connecting to an Internet or intranet.
- The server machine requires a fixed IP address.
- 10 MB of hard disk working space.

### Client

- A computer with a connection to a TCP/IP network capable of connecting to an Internet or intranet.
- HTTP 1.0 compliant web browser.

## WebDrawer server installation

### Pre-installation checks

To minimize confusion, ensure the current date format on the server machine matches the standard date format used by your organization. The format of the current date on the server affects how users need to search for dates when using WebDrawer. For instance, if

the server date format is mm/dd/yy and the user searches for a date in the format dd/mm/yy they will receive incorrect results or an error from the WebDrawer server.

### **Check software installation and templates**

Check that the following software components have been installed on your server computer under your TRIM directory. In addition to the following files, the WebDrawer server also requires access to the DLL's supplied with TRIM to run correctly:

WebServ.exe – This is the TRIM WebDrawer Web server

WebCfg.exe – This is the WebDrawer configuration program

The templates are available in the following directories:

Advanced – These directories contain the advanced WebDrawer templates.

Moderate – These directories contain the moderate WebDrawer templates.

Simple – These directories contain the simple WebDrawer templates.

### **Loading the WebDrawer server**

The WebDrawer server runs as an NT service. If the WebDrawer server has not previously been installed as a system service then follow these steps. In order to load and run the WebDrawer server you must log into your NT server machine as the Administrator.

#### **To load WebDrawer as an NT system service**

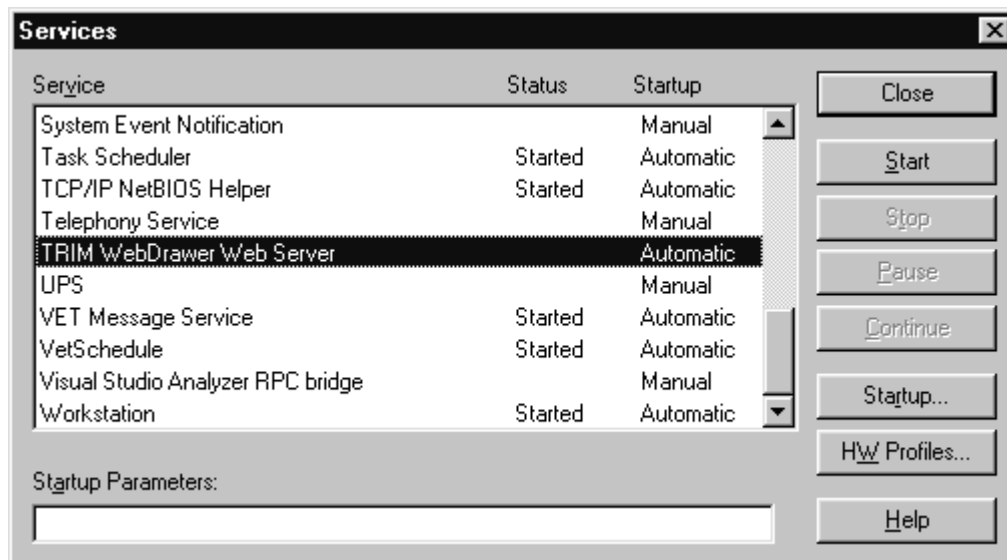
- From the command line type the following:  
[drive]:\[path to program]\Webserv.exe -install  
  
*E.g. "c:\program files\trim\Webserv.exe" -install*

This command adds the TRIM WebDrawer Web Server to the NT services list

#### **To configure the system service**

- From NT control panel click Services
- From the Services list select the TRIM WebDrawer Web Server service





- Click Startup
- Ensure that automatic is selected so that the WebDrawer service begins automatically when the service computer restarts.
- Select User account and type a valid user name and password. The default account must be altered because the standard system account does not provide the required access to the network to allow WebDrawer to run.

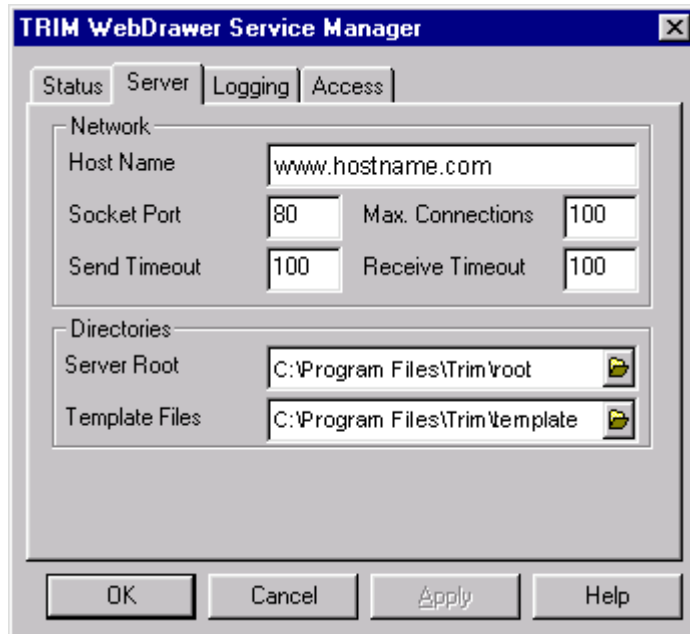
Do not start the WebDrawer server until it has been configured using the TRIM WebDrawer service manager.

- Click OK
- Click Close

### Configuring WebDrawer

#### To configure the WebDrawer server

- Start the TRIM WebDrawer service manager (WebCfg.exe)
- The WebDrawer Service Manager dialog appears



- Select the server tab

Configure the following fields

#### To configure the hostname

- In Host Name Type the IP address or the DNS host name of the computer. The host name can be given in a dot form e.g. 127.0.0.1 or as a fully qualified domain name e.g. www.hostname.com.

#### To configure the Port number

- Type the port number to run the WebDrawer server on.

The HTTP service at port 80 does not have to be specified in a Uniform Resource Locator. If you choose a port other than 80, all browser references to WebDrawer must append the new port number to the URL, e.g. if the server is located on port 5000 of the server www.hostname.com, then any references to the WebDrawer server must appear in the form <http://www.hostname.com:5000>

#### To set the Maximum number of connections

- Type the maximum number of users allowed to use the WebDrawer server at one time.

#### To set the Send timeout value

- Type the amount of time in milliseconds before the server waits before sending a timeout message and dropping an active connection.

The timeout value should be set to the lowest possible number. The higher the timeout value the longer the server has to maintain an active connection, reducing the number of available connections and processing time available to other more recent connections. The default value should only be moved higher if client browsers are constantly receiving timeout or server busy messages from the server.

#### To set the Receive timeout value

- Type the amount of time in milliseconds the server waits before dropping a connection when it receives a timeout.

The receive timeout value should be set to the lowest possible number. The higher the timeout number the longer the server waits, reducing the number of available connections

and processing time available to the server. The default value should only be increased if clients constantly receive timeout messages.

### **Configuring the WebDrawer server administration**

Configure the WebDrawer server directories:

#### **To set the root path**

- In the Server Root box, select the path to be the root directory.

This directory becomes the root directory for the WebDrawer server. When the server is run the index.htm HTML file in the root directory is the first page displayed to WebDrawer users. The default index.htm file is the WebDrawer search page found in the templates/[template detail]/root/ directory. The root directory must also contain any graphics referenced in the default templates.

#### **To set the template path**

- In the Template files box, select the path to the directory containing the templates.

This directory is the directory from which the WebDrawer server selects templates to be used when returning information to the users web browser.

Configure server logs:

Server logs contain information about the functioning of the server. The logs can contain information on the startup and shutdown of the server, requests from users, and responses sent back from the WebDrawer server. The WebDrawer server writes three separate log files.

**Access.log:** Records all successful accesses to the database. The values of the returned codes (200's, 300's) correspond to the codes given in the Hypertext Transfer Protocol (HTTP) RFC 1945.

**Error.log:** Records any client side errors in accessing the database. The values of the returned codes (400's) correspond to the codes given in the Hypertext Transfer Protocol (HTTP) RFC 1945.

**Server.log:** Records all server errors, including startup and shutdown of the server and any server error code (500's) corresponding to the codes given in the Hypertext Transfer Protocol (HTTP) RFC 1945.

#### **To set the server log directories**

- Click the logging tab



In Log Files Directory, select the path that will store the server log files.

#### To restrict the size of the log files

- Select the Cycle logs when they reach check box, type the maximum size for the each log file in the megabytes field.

Once a log file reaches the maximum size, the log files are renamed (as access.001, error.001 etc.) and stored in the same directory.

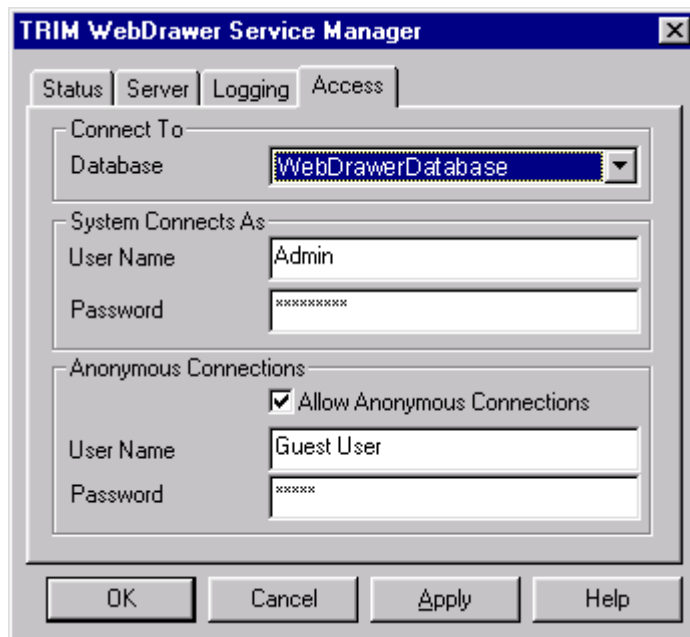
#### To select what information is stored in the server log files

- Select the Startup and Shutdown of server check box, to log the startup and shutdown of the WebDrawer server.
- Select the HTTP protocol request headers check box, to trace the HTTP requests made by browsers to the WebDrawer server. This setting is used for debugging purposes only and if left on will reduce the performance of the server.
- Select the HTTP protocol response headers check box, to trace the HTTP responses sent by the WebDrawer server to the browsers. This setting is used for debugging purposes only and if left on will reduce the performance of the server.

#### Configuring the interface between WebDrawer and the TRIM database

Configure the WebDrawer access to the TRIM database.

- Click the Access tab



#### To choose the database to connect the WebDrawer server to

- Select the TRIM database from the Connect to database drop-down list.

If no databases are displayed in the drop down menu list, then you will have to start TRIM (TRIM.exe) and configure a database.

Each WebDrawer server can only connect to a single database.

#### To set the WebDrawer servers login

In the System connects as box

- Type a TRIM user name and password in the User Name and Password fields.

The WebDrawer server will use the System connects as user name and password to start and maintain a connection to the TRIM database. When a user connects to the TRIM database through WebDrawer, that user's user name and password will be verified against the original database connection maintained by WebDrawer.

#### To allow anonymous logins to the TRIM database via WebDrawer

- Select the Allow Anonymous Connections check box
- Type a user name and password in the User Name and Password fields

When anonymous logins are allowed, users are not required to provide their own user name and password to log into the WebDrawer server. Instead, the user name and password given here are used.

Anonymous users cannot request, or complete actions for records in the database. These features are disabled because the TRIM database is unable to determine who is making the request or asking to complete the action.

#### Finalize the WebDrawer server configuration

##### To finalize the configuration of the WebDrawer server

- Click Apply

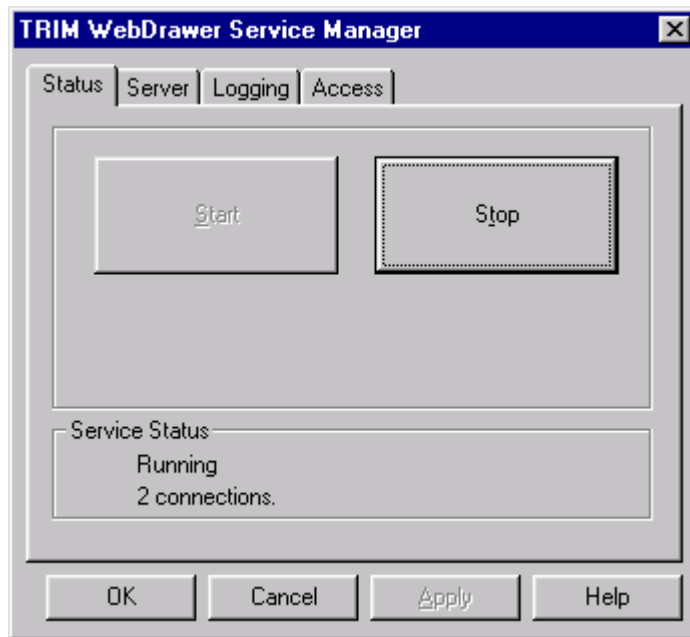
## Start the WebDrawer server running

Start the WebDrawer server only after it has been configured using the TRIM WebDrawer Service Manager.

### To start the WebDrawer server

- Click the TRIM WebDrawer Service Manager status tab

If there is no status tab on the TRIM WebDrawer Service Manager, then the WebDrawer server has not been loaded as an NT service.



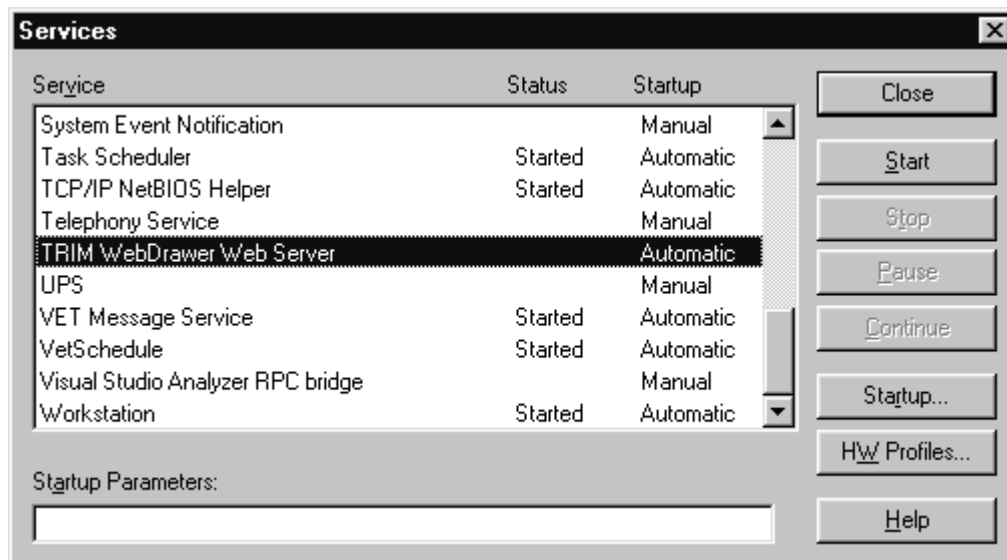
- Click Start to start the web server

The status screen indicates the number of active connections using the server.

- Click OK to close the Webcfg and finish the WebDrawer server setup.

**OR**

- From NT control panel click Services
- From the Services list select the TRIM WebDrawer Web Server service



- Click Start

Once started the WebDrawer server should be accessible through a client web browser.

## Reconfiguring the WebDrawer server

### To stop the WebDrawer server

- Start the WebCfg.exe program
- Click the Status Tab
- Click Stop to stop the WebDrawer server
- After stopping the WebDrawer server, change the appropriate configuration options through Webcfg.
- Click Apply

### To restart the WebDrawer server

- Click the Status Tab
- Click Start to restart the WebDrawer server
- Click OK to close the Webcfg dialog.

## Security

The ability to serve the contents of TRIM databases across a distributed TCP/IP network such as the Internet may introduce new security issues for your organization.

### Server and protocol security

WebDrawer uses the HTTP 1.0 Basic Authentication Scheme for user identification and authentication.

## **Client security issues**

Depending on your organization's security requirements the following client side security issues may need to be addressed:

### **Saving user names and passwords**

Some web browsers allow users to save their user name and passwords into the browser. Saving user names and passwords into a browser can allow unauthorized access to your database by anyone using that browser.

### **Caching of sensitive documents**

Some browsers cache local copies of web pages or downloaded documents. Cached documents can present a security risk, because they may be available over a network to unauthorized viewers. To prevent caching occurring, users can either flush their cache at the end of a WebDrawer session or set their cache size to 0.

### **Downloading of sensitive documents**

Once downloaded a document is accessible on the local machine's hard disk drive. To prevent unauthorized access to these sensitive documents users should save them in a private directory and delete them after use.

### **Logging out of WebDrawer**

The WebDrawer server only requires one login per session. This presents a security risk if a user leaves their web browser unattended. Users should log out after using WebDrawer to prevent another person using the computer to access the TRIM database.

## **WebDrawer server**

The WebDrawer server uses the concept of objects to serve and process requests from the client browser. An object in WebDrawer represents a table in the TRIM database. WebDrawer can work with and request information on the following objects:

Nam – A person

Org – An organization

Pln – A record plan

Pos – A position

Rec – A record

Sch – A retention schedule

Ths – A thesaurus term

Unt – A unit

The data that is returned from the TRIM database is formatted using the WebDrawer templates.

## **WebDrawer templates**

### **What are templates?**

Templates are used by the WebDrawer server to structure data returned from TRIM database objects to the user's browser. The templates supplied with the WebDrawer server are written in standard HTML and include specific WebDrawer tags that relate to information about the object in the database.

### **How do templates work?**



WebDrawer passes requests from the user to the TRIM database. The data from the TRIM database is passed back to WebDrawer. Depending on the type of object requested WebDrawer selects the appropriate template for the data from the templates available in the template directory. This template is then used to format the data for display in the web browser.

The templates work in conjunction with some standard web pages and graphic objects, which are normally located on the same web server. The example templates supplied with WebDrawer include some HTML files and graphics that are located in the root directory.

## **What templates are available?**

### **Templates in the Templates directory**

WebDrawer ships with three pre-generated sets of HTML templates. Each of the sets contain different WebDrawer tags, and will display more (advanced) or less (simple) of the data contained in the TRIM database depending on your requirements.

### **The advanced templates**

- Allow access to most of the data available to people using the standard TRIM database.
- Allow the completion of workflow actions
- Allow users to search for and view record details
- Allow users to download electronic records for viewing
- Allow users to request non-electronic records
- Allow users to read email records stored in the TRIM database through the web browser.

### **The moderate templates**




- Allow access to much of the TRIM database information
- Allow users to search for and view record details
- Allow users to download electronic records for viewing
- Allow users to request non-electronic records

### **The simple templates**

- Allow users to search for and view record details

### **List of templates**

The names of the HTML files are the same across the different types of templates because the templates used by the WebDrawer server are selected based on the name of the file, as opposed to the contents of the file. Because of this, the actual content of the HTML files is different. I.e. the Rec.htm in the simple directory is different to the rec.htm file in the moderate and advanced directories.

The following is a list of available templates. This list shows which of the objects the template relates to and if it is included in the simple  moderate  or advanced 

template directories. If you remove a template from the template directory you remove the support for that function. Similarly adding a template to the template directory will add that functionality to the WebDrawer server.

For a more detailed list of templates and what WebDrawer specific tags, and what data is permitted on each see WebDrawer Appendix 2.

## Object templates

### Record templates – REC object

#### Rec.htm



The default template to display the attributes associated with a single record. This template is used when there is no specific template available for the record type being viewed.

#### Reclist.htm



The default template used to display a list of records in the database.

#### Recreq.htm



Used to display information about a record that has just been requested by a client.

#### Recomp.htm



Used to display information about an action that has just been completed using the WebDrawer server.

### Name Templates – NAM object

#### Nam.htm



Used to display a persons details, either internal staff or people external to the organization.

#### Namlist.htm



Used to display a list of people related to another object e.g.. A list of names belonging to a unit.

### Organization template – ORG object

#### Org.htm



Used to display a single external organization.

### **Record Plan templates - PLN**

#### **Pln.htm**



Used to display a single record plan term.

#### **Plnlist.htm**



List of plans, related to another object. E.g. a list of plans belonging to a plan term.

### **Position templates - POS**

#### **Pos.htm**



A single job position.

#### **Poslist.htm**



A list of positions related to another object e.g. a list of positions belonging to a unit.

### **Retention Schedule template - SCH**

#### **Sch.htm**



Used to display a retention schedule.

### **Thesaurus templates - THS**

#### **Ths.htm**



Used to display a Thesaurus term.

#### **Thslist.htm**

Used to display a list of thesaurus terms.

### **Unit templates - UNT**

#### **Unt.htm**



Used to display information about a single unit.

#### **Untlist.htm**



Used to display a list of units within a parent unit. E.g. a list of units attached to an organization.

### **Name resolution template**

**Namepick.htm**



Used to display a list of people when the search matches more than one instance of that person in the database.

### **Mail Message template**

**Mail.htm**



Used to display an email message stored in the TRIM database.

### **TRIM Error template**

**Error.htm**



Used to display error conditions back to the client. E.g. title word does not exist.

### **System information template**

**Status.htm**



Used to display the system status of the WebDrawer server to a remote administrator.

### **Editing existing templates**

Before editing your templates make sure you have a copy of the default templates. TOWER Software will not support questions concerning any templates other than those supplied with the TRIM database system. If you have any problems with your own templates please return to using the default templates.

It is not recommended that you use a WYSIWYG HTML editor. Some of these editors strip out WebDrawer specific tags rendering the templates unusable.

### **Simple editing of the templates**

#### **Changing the Logos**

Editing the graphics in the templates supplied by TOWER software is the easiest way of altering the templates to suit your organizational needs. This can be done by altering the background image and logos found on the pages.

The existing templates use three logos,

logo.gif – The TOWER Software logo 96×167 pixels.

webd.gif – Copy 1 of the TRIM captura logo 74×104 pixels (most often occurring on the far left-hand side of the default templates).

wdsmall.gif – Copy 2 of the TRIM captura logo 74×104 pixels (most often occurring in the top right of the default templates).

#### **To replace these images with your own**

Change the name of your image file to be the same as the names above, then copy the files into the WebDrawer web server's root directory.

The templates will not resize your images, so it is important to make sure your images are close to the sizes given above, or the templates may not display correctly.

The background graphic used in the default templates is named bg.gif

#### **To alter the background graphic on the pages**

Change the name of your background graphic to bg.gif and copy it over the top of the existing bg.gif.

### **Advanced editing and creation of templates**

The WebDrawer server runs by responding to action requests made by a client. Actions are requested by generating specific universal resource locations (URL's). When these URL's are received by the WebDrawer server the server will return information from the TRIM database to the browser using specific WebDrawer template files.

In order to construct your own templates you need to understand:

- How to request actions to be performed on the TRIM database by the WebDrawer server.
- How to use the WebDrawer specific template syntax to structure data returned from the TRIM database.
- The templates and data that WebDrawer uses to display objects in the TRIM database.

Before editing your templates make sure you have a copy of the standard templates. TOWER Software will not support questions concerning any templates other than those supplied with the TRIM database system. If you have any problems with your own templates please return to using the default templates.

### **Performing actions in the WebDrawer server**

By constructing and submitting specific URL's to the WebDrawer server the following actions can be performed on objects in the TRIM database:

- Search the database for records
- View electronic documents, emails, email attachments and files
- Browse more record information e.g. thesaurus terms and schedules

- Complete a pending workflow action
- Request that a document should be sent to the user
- Check the status of the WebDrawer server

Once a URL corresponding to one of the actions is sent to the WebDrawer server, the server will respond with the object's data formatted using an appropriate template. WebDrawer Appendix 1 contains some example HTML code illustrating how to construct URL's and send them to the WebDrawer server.

## Searching

Search requests are made to the WebDrawer server using the following URL formats:

### Standard search

Standard searches use a single search method and search term.

#### URL format

`http://[address_of_WebDrawer_server]/WebDrawer/search?[search method]=[searchterm]`

*E.g. `http://www.hostname.com/WebDrawer/search?sm_titleword=reef`*

*This example searches the database for all record titles containing the word reef*

### Complex search

There are two methods to constructing a complex search. A paired search and a free search. A paired search uses a numbering system to pair search terms with search methods. This paired method is useful if you are generating searches using a Web based form. The free search evaluates a list of search terms their associated search methods and boolean operators in reverse polish to evaluate the search.

#### URL Format 1 – paired search

`http://[WebDrawer_Hostname]/WebDrawer/search?c1=[search method]&v1=[search term]&c2=[search method2]&v2=[searchterm2]&c3=[search method3]&v3=[searchterm3]&boolall=[boolean]`

*Using the above format the search method c1 is associated with the search term v1. With a paired search there can only be a single boolean operator which works across all of the statement. This operator is defined with the boolall= statement. For example:*

*`http://www.hostname.com/WebDrawer/search?c1=sm_titleword&v1=reef&c2=sm_titleword&v2=great&c3=sm_ftrBgd&v3=barrier&boolall=and`*

*This example searches the database for all records with a title word reef and a title word great and the word barrier in the freetext field.*

#### URL Format 2 – free search

`http://[WebDrawer_Hostname]/WebDrawer/search?[search method]=[search term]&[search method2]=[searchterm2]&bool=[boolean]&[search method3]=[searchterm3]&bool=[boolean]`

*Using the above format the search method is read by the WebDrawer server in reverse. I.e. Perform search 3 bool search 2 bool search 1. For example:*

*`http://www.hostname.com/WebDrawer/search?sm_titleword=reef&sm_titleword=great&bool=or&sm_ftrBgd=barrier&bool=and`*

*This example searches the database for all record titles containing the words barrier in the freetext fields, and the titleword great or the titleword reef.*

### Template

When a search is completed the return information will be formatted using the reclist.htm template.

### Codes for Search Methods

| Search Method       | Search Method Code   | Result                                                                                                                      |
|---------------------|----------------------|-----------------------------------------------------------------------------------------------------------------------------|
| Title Word          | sm_titleword         | Searches for records by the specified title word.                                                                           |
| Notes Word          | sm_notesword         | Searches for records by the specified notes word.                                                                           |
| Document Content    | sm_ftrBgd            | Searches for records by words in associated documents                                                                       |
| Date Created        | sm_creationDate      | Searches for records by the specified date created.                                                                         |
| Record Number       | sm_recordId          | Searches for records by the specified record number.                                                                        |
| Actions by location | sm_srhActProg        | Searches for records by the specified location, and returns the actions in progress.                                        |
| Container Number    | sm_srhNavInContainer | Searches for records by the specified container number.                                                                     |
| Date Created        | sm_creationDate      | Searches for records by the specified date created.                                                                         |
| Date Registered     | sm_regDate           | Searches for records by the specified date registered.                                                                      |
| Date Modified       | sm_reAdded           | Searches for records by the specified date modified.                                                                        |
| Contact             | sm_contact           | Searches for records by the specified contact.                                                                              |
| Thesaurus Term      | sm_tmtext            | Searches for records by the specified thesaurus term.                                                                       |
| Record Plan Number  | sm_fpterm            | Searches for records by the specified record plan number.                                                                   |
| Record Number Range | sm_recIdRange        | Searches for records by the specified record number. Record Number Range searches are done on expanded record numbers only. |
| External Reference  | sm_externalId        | Searches for records by the specified external reference.                                                                   |
| Current Location    | sm_currentLoc        | Searches for records by the specified current location.                                                                     |
| Home Location       | sm_homeLoc           | Searches for records by the specified home location.                                                                        |
| Owner Location      | sm_ownerLoc          | Searches for records by the specified owner.                                                                                |

### Displaying object details

It is possible to access the data of specific objects in the TRIM database through WebDrawer. Use the following URL format to return the details of a specific object:

`http://[WebDrawer_Hostname]/WebDrawer/[type of object]/[unique object number]/`

*E.g. <http://www.hostname.com/WebDrawer/rec/262>*

*This example is the URL for a record object with the unique identifier 262.*

You can view sub-objects that are parts of larger objects using the following URL format:

`http://[WebDrawer_Hostname]/WebDrawer/[type of object]/[unique object number]/[type of sub object]`

*e.g. <http://www.hostname.com/WebDrawer/org/262/nam>*

Will return a list of people associated with the organization object numbered 262.

### Templates

When the details of a single object are returned from the database, the data will be formatted using the template of that object. For example record details will be returned using the `rec.htm` template while a thesaurus object will be returned using the `ths.htm` template.

When a list of sub-objects which are parts of a larger object are requested from WebDrawer, the data will be formatted using the list template associated with the sub-object. For example if a URL is submitted with the following ending `/org/262/nam` WebDrawer will use `namlist.htm` to format the list of names associated with organization object 262.

### Requests

To lodge a request for a document in the TRIM database use the following URL format:

`http://[WebDrawer_Hostname]/WebDrawer/request/[unique object number]`

*E.g. <http://www.hostname.com/WebDrawer/request/262>*

This URL will generate a request for the record numbered 262 in the TRIM database.

### Template

When a request is completed through the WebDrawer server the response is formatted using the `recreq.htm` template.

### Complete actions

**To complete an action for a record use the following URL format:**

`http://[WebDrawer_Hostname]/WebDrawer/complete/[unique object number]`

*E.g. <http://www.hostname.com/WebDrawer/complete/262>*

This URL will complete the next workflow action associated with the record 262.

### Template

When an action is completed through the WebDrawer server the response is formatted using the `recomp.htm` template.

### View or download electronic files

**To view or download a file stored in the TRIM database use the following URL format:**



`http://[WebDrawer_Hostname]/WebDrawer/view/[unique object number]`

*E.g. `http://www.hostname.com/WebDrawer/view/262`*

When you make a view request the WebDrawer server redirects the URL to a specific file. For instance the above request will be redirected to a URL similar to the following:

`http://www.hostname.com/WebDrawer/view/262/document.doc`

This would return the `document.doc` file to the browser, if the browser can interpret this type of file then it will display it, otherwise the user will be prompted to save the file on their local harddisk for viewing later.

## Check the Server Status

**To check the status of the WebDrawer server use the following URL format:**

`http://[WebDrawer_Hostname]/WebDrawer/admin/status`

*E.g. `http://www.hostname.com/WebDrawer/admin/status`*

This returns the running details of the server running at `www.hostname.com`. This request requires that you log into the WebDrawer server as a TRIM database administrator.

### Template

When the server status is requested the information is formatted using the `status.htm` template.

## View an E-mail attachment

**To view an attachment to an email stored in the TRIM database use the following URL format:**

`http://[WebDrawer_Hostname]/WebDrawer/attach/[unique object number for record]/estoreuri/estoreid/filename`

*eg: `http://www.hostname.com/webdrawer/attach/262/123456/1/document.doc`*

This URL will return the `document.doc` file email attachment associated with object 262 located in the email storage numbered 123456 position 1.

## Templates

### Naming Templates

Because the WebDrawer server uses predetermined templates for responding to requests it is not possible to create new templates for any existing objects except for specific record types. To create a specific record for a record type the template must be given the same name as the record type in the TRIM database.

For example, when you create a template to display the details of a record type called `tender` in the TRIM database, you need to name the template `tender.htm`. This template needs to be placed in the WebDrawer templates directory.

## Including data in pages returned from the WebDrawer server

The web pages that are returned by the WebDrawer server are made from two separate parts, the TRIM data, and the formatting commands for that data. When constructing your own WebDrawer templates, or restructuring the existing templates you need to address two issues:

Template syntax – the structuring of the data

Data names – what data will be returned to the user.

### Template Syntax

#### WebDrawer template syntax.

The syntax for the WebDrawer templates is based on WebDrawer specific tags that resemble standard HTML. These WebDrawer specific tags can be inserted into any HTML file, and are used to format the data from objects in the TRIM database.

The WebDrawer specific tags allow for the following TRIM data to be included in WebDrawer templates:

- Captions - Allows the creation of headings based on column names returned from the database. The captions for fields will change depending on the record type they are displaying.
- Data - Data from the TRIM database about the object
- Hypertext links – Generates hypertext links based on data returned from the TRIM database.
- Inline images – allows the inclusion of images returned from the TRIM database
- Conditional branching – Simple if-then-else conditional branching based on the availability of data in the TRIM database.
- For looping – Simple looping based on the number of entities in a sub-object of the current object.

### A detailed description of template syntax

#### Captions

`wd.cap.col.wd`

`wd.cap.dataname.wd` is replaced by the caption given to the **dataname** for this object in the database.

*E.g. `Wd.cap.OwnerLoc.wd` will appear as *Owner Location**

#### Data

`wd.data.dataname.wd p`

`wd.data.dataname.wd` is replaced by the object data in the **dataname** field.

*E.g. On the record description template (rec.htm) Wd.data.OwnerLoc.wd may appear as "Storage Room" depending on what data is stored in the Owner Location in the TRIM database.*

## Hypertext Links

These tags allow you to create an HTML compliant URL link. The syntax provides for simple conditional branching. This branching depends on if the link generated is empty or not.

```
<wd.href.dataname.wd parameters>
  htmlBlock1
  {{ linkedBlock }}
  htmlBlock2
  ~ invalidLinkHtml
</wd.href.dataname.wd>
```

The link generated is based upon the **dataname** for the object being published.

**parameters** can be any text that would make sense when included inside an HREF link. E.g. TARGET="NewWindow". **Parameters** is inserted verbatim into any resulting HREF output.

If the link is valid:

- htmlBlock1 and htmlBlock2 will be part of the output but not part of the text enclosed within the link.
- linkedBlock will be part of the output and will be the only part inside the link.
- invalidLinkHtml will be ignored.

If the link is **not** valid:

- htmlBlock1, htmlBlock2 and linkedBlock will all be ignored.
- invalidLinkHtml will be part of the output, but will not be enclosed in a link.

If **invalidLinkHtml** is not present, e.g., no "~", then **invalidLinkHtml** is considered to be the string concatenation of **htmlBlock1**, **htmlBlock2** and **linkedBlock**

**htmlBlock1** and **htmlBlock2** are optional fields.

If **htmlBlock1** and/or **htmlBlock2** are omitted, then the corresponding "{" and/or "}" delimiters is optional.

## Inline Images

This allows for the generation of an HTML compliant inline image link. The syntax provides for some simple conditional branching based upon whether the link generated is empty or not.

```
<wd.img.dataname.wd parameters>
  validLinkHtml
  ~ invalidLinkHtml
</wd.img.dataname.wd>
```

The link generated is based upon the **dataname** for the object being published.

**parameters** can be any text that would make sense when included inside an "IMG SRC" link. E.g. ALT="DescriptionOfImage". **Parameters** are inserted verbatim into any resulting "IMG SRC" output.

**validLinkHtml** will be output immediately after a valid link.

**invalidLinkHtml** will be output if the link is invalid, and the link will not be generated.

If **invalidLinkHtml** is not present, i.e. no "~", then **invalidLinkHtml** is considered to be equal to **validLinkHtml**.

### Conditional Branching

This is a simple mechanism for the output one of two different blocks of HTML based on a simple text comparison between a literal value and a value extracted from the database:

```
<wd.if.dataname.wd operator value >
    trueHtmlBlock
  ~ falseHtmlBlock
</wd.if.dataname.wd>
```

**wd.if.dataname.wd** returns the value of the dataname from the object, this value is used as the left hand side of the comparison test.

**operator** indicates **equality** when it is "=" or "==" or omitted.

**operator** indicates **inequality** when it is "!=".

**value** is used as the right hand side of the comparison test and **must** be a literal string with optional double quotes, to allow for leading or trailing spaces. If **value** is omitted it is assumed to be "".

**trueHtmlBlock** is only output if the condition evaluates to **true**.

**falseHtmlBlock** is only output if the condition evaluates to **false**.

If only one htmlBlock is present, e.g., no "~", then that block is assumed to be **trueHtmlBlock**, and **falseHtmlBlock** is assumed to be "".

*E.g.*

```
<wd.if.OwnerLoc.wd != "Storage Room" >
<P>The owner is not located in the storage room</P>
~<P>The owner is located in the storage room</P>
</wd.if.OwnerLoc.wd>
```

### For Looping

This allows for a publishing loop within the scope of the tag. The main use is to repeat a section of HTML for each sub-entity within the entity being published. For example, to publish the list of all staff members within the unit being published:

```
<wd.for.dataname.wd>
    htmlBlock
</wd.for.dataname.wd>
```

**wd.for.dataname.wd** evaluates to a for loop, with the number of iterations equal to the number of entities corresponding to named **dataname** within the object being published.

**htmlBlock** is a block of HTML, which can include WebDrawer tags that will be evaluated in the context of the sub element being published rather than in the context of the outer entity. Template fields and configurations according to record types.

```
<wd.page.data.wd>
  htmlBlock
</wd.page.data.wd>
```

This is a special tag used in REC type templates. It specifies that for every occurrence of a REC object returned from a search the HTML code should execute.

*E.g.* `<wd.page.data.wd>`  
`<wd.href.view.wd>view document</wd.href.view.wd>`  
`</wd.page.data.wd>`

If this code is included in the reclist.htm document then for each positive match on a record a search request gets, a link will be generated to that document, the links will all be labeled view document.

### Template specific tags and data

For additional information on what WebDrawer tags are available in each of templates see WebDrawer Appendix 2.

### Data names

Each template can return information about the object that it references. Only certain types of information are available for each object in the TRIM database. This information is specified using data names. These data names appear inside the WebDrawer specific formatting tags.

For additional information on what specific data names are available in each of the WebDrawer templates see WebDrawer Appendix 2.

### Available data names for each object type

#### REC

Valid Tags for use in WD.DATA.\*.WD, WD.CAP.\*.WD and WD.IF.\*.WD:

| TAG          | CAPTION (default only)                 |
|--------------|----------------------------------------|
| Uri          | Unique record identifier               |
| Name         | Name ( same data as record Id)         |
| FullName     | Full Name ( same data as record title) |
| ReVersions   | Revision Number                        |
| RecordId     | Record Number                          |
| title        | Record Title                           |
| regDate      | Date Registered                        |
| creationDate | Date Created                           |
| closeDate    | Date Closed                            |
| rcDueDate    | Date Due                               |
| accessionNbr | Accession Number                       |
| externalId   | External Reference                     |

| <b>TAG</b>      | <b>CAPTION (default only)</b> |
|-----------------|-------------------------------|
| priority        | Priority                      |
| usrString1      | Field 1                       |
| usrString2      | Field 2                       |
| usrString3      | Field 3                       |
| usrFlag1        | Flag 1                        |
| usrFlag2        | Flag 2                        |
| usrFlag3        | Flag 3                        |
| usrDec1         | Cost 1                        |
| usrDec2         | Cost 2                        |
| usrDec3         | Cost 3                        |
| usrDate1        | Date 1                        |
| usrDate2        | Date 2                        |
| usrDate3        | Date 3                        |
| fullRecordId    | Expanded Record Number        |
| LastActionDate  | Date of Last Action           |
| consignment     | Consignment Number            |
| inactiveDate    | Date Inactive                 |
| usrLong1        | Number 1                      |
| usrLong2        | Number 2                      |
| usrLong3        | Number 3                      |
| recTypeName     | Record Type                   |
| currentLoc      | Current Location              |
| primaryContact  | Primary Contact               |
| prContType      | Primary Contact (+Type)       |
| prContPh        | Primary Contact (+Phone)      |
| prContPhAddr    | Primary Contact Details       |
| prContOrg       | Primary Contact Org'n         |
| prContAddr      | Primary Contact Address       |
| otherNames      | Other Contacts                |
| othNmPhone      | Other Contacts (+Phone)       |
| othNmPhAddr     | Other Contacts Details        |
| ownerRecordId   | Container Record              |
| ownerRecTitle   | Container Record (Title)      |
| relatedRecordId | Related To                    |
| seriesId        | Series Record                 |
| seriesContents  | Records within Series         |
| caveat          | Caveat                        |
| moveHist        | Movement History              |
| requests        | Requests                      |
| contains        | Records Within                |
| nextPart        | Next Part                     |
| prevPart        | Previous Part                 |
| latestPart      | Latest Part                   |
| rootPart        | First Part                    |
| allParts        | All Parts                     |
| allVersions     | All Versions                  |
| attached        | Enclosed?                     |
| erStore         | Document Store                |
| CurrentAction   | Current action                |
| overdueActions  | Overdue actions               |
| allActions      | All actions                   |
| topActions      | Procedures                    |
| currentDisp     | Current Disposition           |

| <b>TAG</b>              | <b>CAPTION (default only)</b> |
|-------------------------|-------------------------------|
| recArchiveAuth          | Retention Schedule            |
| filePlan                | Record Plan                   |
| allLinks                | All Linked Records            |
| allPendingEvents        | All Pending Events            |
| reModDate               | Date Modified                 |
| foreignBarcode          | Foreign Barcode               |
| rpCurrentLocWithDate    | Current Location + First Date |
| rpCurrentLocWithEndDate | Current Location + Last Date  |
| recordClass             | Record Class                  |
| edmDisplay              | Electronic Details            |
| destructionDue          | Destroy on                    |
| accessControl           | Access Control                |
| notes                   | Notes                         |
| terms                   | Thesaurus Terms               |
| homeLoc                 | Home Location                 |
| ownerLoc                | Owner Location                |
| security                | Security Level                |

Valid "HREF" tag types:

| <b>TAG</b>      | <b>ACTION</b>                   |
|-----------------|---------------------------------|
| VIEW            | View the electronic document    |
| 2.PLN           | Attached record plan.           |
| 2.SCH           | Attached schedule.              |
| HOMELOC         | Home Location.                  |
| OWNERLOC        | Owner Location.                 |
| CURRENTLOC      | Current Location.               |
| PRIMARYCONTACT  | Primary Contact                 |
| OWNERRECORDID   | Owner Record.                   |
| CONTAINS        | List of records within.         |
| RELATEDRECORDID | List of related records.        |
| SERIESCONTENTS  | records in same series.         |
| ROOTPART        | Root part of this part series.  |
| PREVPART        | Previous record in part series. |
| NEXTPART        | Next record in part series.     |
| LATESTPART      | Latest record in part series.   |
| ALLPARTS        | All Records in part series.     |
| fullRecordId    | Link to this record.            |
| recordId        | Link to this record.            |
| name            | Link to this record.            |

Valid "FOR" loop types:

| <b>TAG</b> |                               |
|------------|-------------------------------|
| THS        | All attached thesaurus terms. |
| NAM        | All attached contacts.        |

## **UNT**

Valid Tags for use in WD.DATA.\*.WD, WD.CAP.\*.WD and WD.IF.\*.WD:

| <b>TAG</b> | <b>CAPTION (default only)</b>  |
|------------|--------------------------------|
| uri        | Unique record identifier       |
| name       | Name ( same data as unitName ) |

|                |                                     |
|----------------|-------------------------------------|
| fullName       | Full Name ( same data as unitName ) |
| unitName       | Unit Name                           |
| unitAbbrev     | Unit Name Abbreviation              |
| pUnitName      | Parent Unit Name                    |
| PHONE          | Phone                               |
| PHONE2         | Alternate Phone                     |
| FAX            | Fax                                 |
| isUnitDeleted  | Is Unit Deleted?                    |
| barcode        | TRIM Barcode                        |
| foreignBarcode | Foreign Barcode                     |
| EMAIL          | Primary Email                       |
| ADDRESS        | Street or Postal Address            |
| SADDRESS       | Street Address                      |
| PADDRESS       | Postal Address                      |
| security       | Security Level                      |
| caveats        | Caveats                             |
| secProfile     | Security and Caveats.               |

Valid "HREF" tag types:

| TAG       | ACTION                                  |
|-----------|-----------------------------------------|
| name      | Link to this unit.                      |
| PUNITNAME | Link to Parent Unit.                    |
| EMAIL     | MailTo link to primary email.           |
| 1.UNT     | List of Units within this unit.         |
| 2.UNT     | Link to Parent Unit.                    |
| 1.POS     | List of positions within this unit.     |
| 1.NAM     | List of staff members within this unit. |
| 1.RCC     | List of Records currently at this unit. |
| 1.RCH     | List of Records at home at this unit.   |
| 1.RCO     | List of Records owned by this unit.     |
| 1.RCQ     | List of Records requested by this unit. |

Valid "FOR" loop types:

| TAG |                                         |
|-----|-----------------------------------------|
| UNT | List of Units within this unit.         |
| POS | List of positions within this unit.     |
| NAM | List of staff members within this unit. |
| RCC | Records currently at this unit.         |
| RCH | Records at home at this unit.           |
| RCO | Records owned by this unit.             |
| RCQ | Records requested by this unit.         |

### POS

Valid Tags for use in WD.DATA.\*.WD, WD.CAP.\*.WD and WD.IF.\*.WD:

| TAG            | CAPTION (default only)                 |
|----------------|----------------------------------------|
| uri            | Unique record identifier               |
| name           | Name( same data as positionName )      |
| fullName       | Full Name( same data as positionName ) |
| positionName   | Position Name                          |
| positionNumber | Position Number                        |
| phone          | Phone Number                           |



|                |                               |
|----------------|-------------------------------|
| phone2         | Phone Number                  |
| cLocFax        | Fax for this position's unit. |
| designation    | designation                   |
| isPosnDeleted  | deleted                       |
| isBoss         | Section head                  |
| email          | E-mail address                |
| barcode        | Barcode                       |
| foreignBarcode | Foreign Barcode               |
| security       | Security Level                |
| caveats        | Caveats                       |
| secProfile     | Security and Caveats.         |
| pUnitName      | Parent Unit or Organization   |
| pOrgName       | Parent Unit or Organization   |
| address        | Address                       |
| sAddress       | Street Address                |
| pAddress       | Postal Address                |

Valid "HREF" tag types:

| TAG   | ACTION                                      |
|-------|---------------------------------------------|
| name  | link to this position.                      |
| email | MailTo link to primary email.               |
| 2.UNT | Link to Parent Unit.                        |
| 1.NAM | List of staff members within this position. |
| 1.RCC | List of Records currently at this position. |
| 1.RCH | List of Records at home at this position.   |
| 1.RCO | List of Records owned by this position.     |
| 1.RCQ | List of Records requested by this position. |

Valid "FOR" loop types:

| TAG |                                     |
|-----|-------------------------------------|
| NAM | Staff members within this position. |
| RCC | Records currently at this position. |
| RCH | Records at home at this position.   |
| RCO | Records owned by this position.     |
| RCQ | Records requested by this position. |

## ORG

Valid Tags for use in WD.DATA.\*.WD, WD.CAP.\*.WD and WD.IF.\*.WD:

| TAG           | CAPTION (default only)             |
|---------------|------------------------------------|
| uri           | unique record identifier           |
| name          | Name ( same data as orgName )      |
| fullName      | Full Name ( same data as orgName ) |
| orgName       | Organization Name                  |
| companyNumber | Company Number                     |
| orgAbbr       | Abbreviation                       |
| phone         | Phone Number                       |
| phone2        | Alt Phone Number                   |
| fax           | Fax                                |
| email         | E-Mail Address                     |
| address       | Address                            |
| sAddress      | Street Address                     |

| TAG       | CAPTION (default only) |
|-----------|------------------------|
| pPostcode | Postal Code            |
| pAddress  | Postal Address         |

Valid "HREF" tag types:

| TAG   | ACTION                                          |
|-------|-------------------------------------------------|
| name  | link to this organization.                      |
| email | MailTo link to primary email.                   |
| 1.NAM | List of contacts at this organization.          |
| 1.RCC | List of Records currently at this organization. |

Valid "FOR" loop types:

| TAG |                                         |
|-----|-----------------------------------------|
| NAM | Contacts at this organization.          |
| RCC | Records currently at this organization. |

### NAM

Valid Tags for use in WD.DATA.\*.WD, WD.CAP.\*.WD and WD.IF.\*.WD:

| TAG            | CAPTION (default only)   |
|----------------|--------------------------|
| uri            | unique record identifier |
| name           | Name                     |
| fullName       | Full Name                |
| surname        | Last Name                |
| givenName      | First Name               |
| honorific      | Honorific                |
| postNominal    | Post Nominal             |
| initial1       | First Initial            |
| initial2       | Second Initial           |
| phone          | Phone Number             |
| phone2         | Alt Phone Number         |
| phoneAH        | After Hours Phone Number |
| fax            | Fax                      |
| gender         | Gender                   |
| isStaff        |                          |
| email          | E-Mail Address           |
| address        | Address                  |
| sAddress       | Street Address           |
| sState         | State                    |
| sSuburb        | Suburb                   |
| sPostcode      | Postcode                 |
| pAddress       | Postal Address           |
| pState         | State                    |
| pSuburb        | Suburb                   |
| pPostcode      | Postcode                 |
| taxFileNumber  | External Id Number       |
| employeeNumber | Employee Nbr             |
| userLogin      | Login                    |
| security       | Security Level           |
| caveats        | Caveats                  |
| secProfile     | Security profile         |

| <b>TAG</b>     | <b>CAPTION (default only)</b> |
|----------------|-------------------------------|
| isNameDeleted  | Deleted                       |
| userType       | User type                     |
| unitName       | Unit name                     |
| positionName   | Position name                 |
| barcode        | Barcode                       |
| foreignBarcode | Foreign Barcode               |

Valid "HREF" tag types:

| <b>TAG</b> | <b>ACTION</b>                               |
|------------|---------------------------------------------|
| name       | link to this person.                        |
| email      | Email Address                               |
| 2.UNT      | Link to Parent Unit.                        |
| 2.POS      | Link to Parent Position.                    |
| 1.RCA      | List of Records with this attached Contact. |
| 1.RCC      | List of Records currently at this Person.   |
| 1.RCH      | List of Records at home at this Person.     |
| 1.RCO      | List of Records owned by this Person.       |
| 1.RCQ      | List of Records requested by this Person.   |

Valid "FOR" loop types:

| <b>TAG</b> |                                     |
|------------|-------------------------------------|
| RCA        | Records with this attached Contact. |
| RCC        | Records currently at this Person.   |
| RCH        | Records at home at this Person.     |
| RCO        | Records owned by this Person.       |
| RCQ        | Records requested by this Person.   |

## **SCH**

Valid Tags for use in WD.DATA.\*.WD, WD.CAP.\*.WD and WD.IF.\*.WD:

| <b>TAG</b>          | <b>CAPTION (default only)</b>           |
|---------------------|-----------------------------------------|
| uri                 | unique record identifier                |
| name                | Name ( same data as scheduleName )      |
| fullName            | Full Name ( same data as scheduleName ) |
| scheduleName        | Title                                   |
| barcode             | Barcode                                 |
| longScheduleSubject | Description                             |
| longDisposalAction  | Disposal                                |
| isAgencySpecific    | Agency Specific?                        |
| schNotInUse         | Not in use                              |
| retainPermanent     | Retain Permanent                        |
| scheduleId          | Schedule Number                         |
| source              | Source                                  |
| destroyTriggers     | Disposal Triggers                       |
| custodyTriggers     | Custody Triggers                        |

Valid "HREF" tag types:

| <b>TAG</b> | <b>ACTION</b>                       |
|------------|-------------------------------------|
| name       | link to this schedule.              |
| 1.BRC      | List of Records with this schedule. |

Valid "FOR" loop types:

| TAG |                             |
|-----|-----------------------------|
| BRC | Records with this schedule. |

### FP

Valid Tags for use in WD.DATA.\*.WD, WD.CAP.\*.WD and WD.IF.\*.WD:

| TAG           | CAPTION (default only)            |
|---------------|-----------------------------------|
| Uri           | Unique record identifier          |
| name          | Name ( same data as fpterm )      |
| fullName      | Full Name ( same data as fpterm ) |
| fpterm        | Record Plan Text                  |
| expFullPlanId | Full Uncompressed Plan Number     |
| expPlanId     | Full Plan Number                  |
| fullPlanId    | Uncompressed Plan Number          |
| planId        | Plan Number                       |
| title         | Titling Prefix                    |
| homeLoc       | Home Location                     |
| ownerLoc      | Owner Location                    |
| SecProfile    | Security Profile                  |
| Security      | Security Level                    |
| Notes         | Notes                             |
| scheduleId    | Schedule Number                   |

Valid "HREF" tag types:

| TAG   | ACTION                                 |
|-------|----------------------------------------|
| name  | link to this term.                     |
| 1.FP  | List of Subordinate Terms.             |
| 2.FP  | Parent Record Plan Term.               |
| 2.SCH | Attached Retention Schedule.           |
| 1.BRC | List of Records attached to this term. |

Valid "FOR" loop types:

| TAG |                                |
|-----|--------------------------------|
| FP  | Subordinate Terms.             |
| BRC | Records attached to this term. |

### THS

Valid Tags for use in WD.DATA.\*.WD, WD.CAP.\*.WD and WD.IF.\*.WD:

| TAG       | CAPTION (default only)            |
|-----------|-----------------------------------|
| Uri       | unique record identifier          |
| Name      | Name ( same data as tmText )      |
| FullName  | Full Name ( same data as tmText ) |
| TmText    | Term Text                         |
| TmSource  | Source Defining Term              |
| TmId      | Term Identifier                   |
| TmRecords | Record Count                      |
| TmKeyword | Is Keyword?                       |
| TmAspect  | Is Aspect?                        |

|             |                 |
|-------------|-----------------|
| TmNotes     | Has Scope?      |
| TmForbidden | Forbidden Term? |
| Notes       | Notes.          |
| TmType      | Term Type       |

Valid "HREF" tag types:

| TAG   | ACTION                               |
|-------|--------------------------------------|
| Name  | link to this term.                   |
| 1.BRC | Records with this term attached.     |
| 1.REC | Records with this term in the title. |
| 1.TBT | List of Broader Terms.               |
| 1.TNT | List of Narrower Terms.              |
| 1.TRT | List of Related Terms.               |
| 1.TUF | List of Used For Terms.              |
| 1.TUS | List of Use Terms.                   |

Valid "FOR" loop types:

| TAG |                                      |
|-----|--------------------------------------|
| BRC | Records with this term attached.     |
| REC | Records with this term in the title. |
| TBT | List of Broader Terms.               |
| TNT | List of Narrower Terms.              |
| TRT | List of Related Terms.               |
| TUF | List of Used For Terms.              |
| TUS | List of Use Terms.                   |

## WebDrawer Appendix 1-HTML code samples

### Examples of constructing requests to perform actions

#### Searching

##### Searching the TRIM database

The HTML pages and templates supplied with WebDrawer use forms and embedded WebDrawer commands to generate search requests. Some examples illustrating how searches are composed are given below. In addition to these examples there are many other methods for generating WebDrawer search requests e.g. Java applets, active X components, CGI-scripts etc.

##### Saving searches as a bookmark.

Regular searches on the database can be performed by bookmarking a commonly used search. To include more functionality in bookmarked searches you might like to browse <http://www.bookmarklets.com/>. Bookmarklets are bookmarks that use JavaScript. This JavaScript adds functionality such as popup search boxes to your bookmarks.

#### Constructing Searches

Using the GET method and a form.

The search is made by making a call to the WebDrawer search method, using a form

### Example of a simple search

```
<HTML>
<HEAD>
  <TITLE>Simple Search Example</TITLE>
</HEAD>
<BODY>
<!--change sm_titleword to the search method you require-->
  <FORM METHOD="GET" ACTION="/WebDrawer/search">
    <P>Quick Search:<BR>
    <INPUT TYPE="TEXT" NAME="sm_titleword"><BR>
    <INPUT TYPE="SUBMIT" VALUE="Search"></P>
  </FORM>
</BODY>
</HTML>
```

### Example of an advanced search

This is an example of an advanced search using a multifield form.

```
<HTML>
<HEAD>
  <TITLE>Complex Search Example</TITLE>
</HEAD>
<BODY>
  <FORM METHOD="GET" ACTION="/WebDrawer/search">
    <P>Search for:
      <SELECT NAME="c1" SIZE="1">
        <OPTION SELECTED VALUE="sm_titleword">Title Words </OPTION>
        <OPTION value="sm_notesword">Notes Words </OPTION>
      </SELECT>
    <BR>Equal To:
      <INPUT TYPE="text" NAME="v1" SIZE="25">
    <BR>All must match (AND):
      <INPUT TYPE="RADIO" NAME="boolall" VALUE="and" CHECKED>
    <BR>Any matches (OR):
      <INPUT TYPE="RADIO" NAME="boolall" VALUE="or">
    <BR>
      <INPUT TYPE="submit" VALUE="Do Search">
    </P>
  </FORM>
</BODY>
</HTML>
```

### String searches

Searches can be included as static links within web pages:

```
<A HREF="[WebDrawer_Hostname]/webdrawer/search?sm_srhActProg=myname">Actions marked to me</a>
```

This HTML code will display Actions marked to me as a hyperlink. When the hyperlink is clicked the web browser will search for all actions marked to the user myname.

Using dynamic inclusion in WebDrawer templates you can use data returned from the TRIM database to create further searches. The example below uses the creation date of a returned record to search for more records created on that date.

```
<A HREF="[WebDrawer_Hostname]/webdrawer/search?sm_creationDate=WD.DATA.CREATIONDATE.WD,WD.DATA.CREATIONDATE.WD">WD.DATA.CREATIONDATE.WD</a>
```

This HTML code when returned through the WebDrawer server as part of an HTML page displays something like 10/23/99. Clicking this link will cause WebDrawer to search for all documents created on the 10/23/1999.

## Displaying object details

To display the details of a record you must supply the unique Record ID number for the record. This number is returned with the data name recordId when you make a successful search. To generate a link to the details of a series of records you can use the following code in the reclist.htm template that is the template returned after a successful search.

```
<WD.PAGE.DATA.WD><!--this generates one entry for every positive match found in the database
-->
<WD.HREF.RECORDID.WD>Record Information</WD.HREF.RECORDID.WD><BR>
</WD.PAGE.DATA.WD>
```

This HTML code will return a series of links each named Record Information. Each of these links will generate HTML code linking to the details of a separate record.

*E.g If the search returned three positive matches the following code may be generated in the Web page.*

```
<A HREF=http://www.hostname.com/WebDrawer/rec/262>Record information</A><BR>
<A HREF=http://www.hostname.com/WebDrawer/rec/263>Record information</A><BR>
<A HREF=http://www.hostname.com/WebDrawer/rec/264>Record information</A><BR>
```

## Requests

To generate a request for a document through WebDrawer you need to know the document's unique object number. This number needs to be referenced in the HTML code. The following code from the advanced rec.htm file illustrates how to construct a link that when clicked will generate a document request.

```
<A HREF="/WebDrawer/request/WD.DATA.URI.WD/">place a request for this document</A>
This code when returned with the details of a record (using the rec.htm template), will
generate a link place a request for this document.
```

*The HTML generated by this code might look something like:*

```
<A HREF="/WebDrawer/request/262/">place a request for this document</A>
```

## Complete actions

By including the unique object number in the HTML code it is possible complete pending actions for objects in the TRIM database.

The following HTML code from the rec.htm template illustrates how to do this:

```
<A HREF="/WebDrawer/complete/WD.DATA.URI.WD/">complete the current action</A>
This code when returned with the details of a particular record (using the rec.htm template),
will generate a link named complete the current action. When clicked, this link completes the
action pending on that record.
```

*The HTML code generated by using this code may look something like*

```
<A HREF="/WebDrawer/complete/262/">complete the current action</A>
```

## View or download electronic files

To download or view an electronic file stored in the TRIM database you need to know the electronic file's unique object number.

The following HTML code from the reclist.htm template illustrates how to do this:

```
<WD.PAGE.DATA.WD><!--this generates one entry for every positive match found in the database
-->
<WD.HREF.VIEW.WD>View this Document</WD.HREF.VIEW.WD>
</WD.PAGE.DATA.WD>
```

This code will generate a series of links named View this Document. When clicked, this link will display the electronic file it represents.

*E.g The HTML code generated by using these tags will look something like*

```
< A HREF="http://www.hostname.com/WebDrawer/view/262">View this Document</A>
< A HREF="http://www.hostname.com/WebDrawer/view/263">View this Document</A>
< A HREF="http://www.hostname.com/WebDrawer/view/264">View this Document</A>
```

## Check the Server Status

The following code will create a link named Check Status which will allow the checking of the server status from a remote location.

```
<A HREF="http://[WebDrawer_Hostname]/WebDrawer/admin/status">Check Status</A>
```

## View an E-mail attachment

By using data returned by a request that responds with the mail.htm template it is possible to download attachments to e-mails through the WebDrawer server. The following HTML code from the mail.htm template illustrates this:

```
<WD.FOR.ATTACHMENTS.WD>
<A HREF="WD.DATA.ATTPREFIX.WDWD.DATA.ATTSUFFIX.WD">download attachment</A>
</WD.FOR.ATTACHMENTS.WD>
```

This code will generate a series of links named download attachments. When clicked, these links allow the user to view or download the attachments to the email.

The HTML code generated by using these tags will look like:

```
<A HREF="http://www.hostname.com/WebDrawer/attach/262/123456/1/document.doc">download
attachment</A>
```

This URL will return the document.doc file email attachment associated with object 262 located in the email storage numbered 123456 position 1.

## WebDrawer Appendix 2-Detailed description of templates

### Name resolution template.

#### NAMEPICK.HTM

Used to display a list of People in the context of an ambiguous search by person, where there are probably duplicates.

Basic object is a "NAM" which is the abbreviation for a person.

Additional Tags:

|            |  |
|------------|--|
| <b>TAG</b> |  |
|------------|--|



| TAG                   |                                                                                                     |
|-----------------------|-----------------------------------------------------------------------------------------------------|
| WD.DATA.SEARCH_URL.WD | Returns the URL to repeat original search with this particular person instead of the ambiguous one. |

### Mail Message Template

#### MAIL.HTM

This special template just converts a mail message item out of a TRIM store, into a readable HTML format.

#### Tags for a Mail Message:

Valid Tags for use in WD.DATA.\*.WD, and WD.IF.\*.WD (Note: not captions)

| TAG            | CAPTION (default only) |
|----------------|------------------------|
| PRIMARYCONTACT | Sent From              |
| USRSTRING1     | Date Sent              |
| USRSTRING2     | Date Received          |
| NOTES          | Message Text           |

Valid "HREF" tag types:

| TAG   | ACTION                    |
|-------|---------------------------|
| EMAIL | link to person sent from. |

Valid "FOR" loop types:

| TAG         |                                       |
|-------------|---------------------------------------|
| TO          | List of "TO" Recipients. (see below)  |
| CC          | List of "CC" Recipients. (see below)  |
| BCC         | List of "BCC" Recipients. (see below) |
| ATTACHMENTS | List of Mail Attachments. (see below) |

Tags for a Mail Message Recipient:

Valid Tags for use in WD.DATA.\*.WD, and WD.IF.\*.WD (Note: not captions)

| TAG     |                                            |
|---------|--------------------------------------------|
| MATYPE  | Mail Address Type, e.g. "SMTP", "EX", etc. |
| CONTACT | Display Name, e.g. "Bill Smith".           |
| NAME    | Email, e.g. "smith@acme.com"               |

Valid "HREF" tag types:

|      |  |
|------|--|
| None |  |
|------|--|

Valid "FOR" loop types:

|      |  |
|------|--|
| None |  |
|------|--|

Tags for a Mail Message Attachment:

Valid Tags for use in WD.DATA.\*.WD, and WD.IF.\*.WD (Note: not captions)

| TAG |  |
|-----|--|
|-----|--|

|           |                                                           |
|-----------|-----------------------------------------------------------|
| NAME      | Display name of Attachment.                               |
| ATTPREFIX | First half of Attachment URL.                             |
| ATTSUFFIX | Second half of Attachment URL. (Use together with above). |

Valid "HREF" tag types:

|      |  |
|------|--|
| None |  |
|------|--|

Valid "FOR" loop types:

|      |  |
|------|--|
| None |  |
|------|--|

### TRIM Error template

#### ERROR.HTM

Used to display an error condition back to the client that does not come under the category of a "web error". Such as "title word does not exist".

Additional Tags:

|                     |                                             |
|---------------------|---------------------------------------------|
| No additional tags. | The error is passed through as the HEADING. |
|---------------------|---------------------------------------------|

### System Information Template

#### STATUS.HTM

Provides a way for the administrator to check on the status of the web server without having to be at the server machine. This template can only be viewed if the WebDrawer user has administrator access to the TRIM database.

Valid Tags for use in WD.DATA.\*.WD and WD.IF.\*.WD, (Note: not captions)

| TAG            |                                                       |
|----------------|-------------------------------------------------------|
| HOST           | Host Name of the Web Server, e.g. "acme.com"          |
| PORT           | Socket Port, e.g. "81"                                |
| ROOTURL        | Root URL of the Web Server, e.g. "http://acme.com:81" |
| SENDTIMEOUT    | Send Timeout.                                         |
| RECEIVETIMEOUT | Receive Timeout.                                      |
| CONNECTIONS    | Current Connections.                                  |
| MAXCONNECTIONS | Maximum Connections Allowed.                          |
| HICONNECTIONS  | Highest Number of Connections since started.          |
| ALLOWANON      | Allowing Anonymous logins.                            |
| ROOTPATH       | Path to Root directory.                               |
| TEMPLATEPATH   | Path to templates directory.                          |
| LOGPATH        | Path to log files.                                    |
| CYCLELOGS      | Cycle Logs?                                           |
| LOGSIZE        | When logs reach this many Megabytes.                  |
| TRACESTARTUP   | Are we tracing start up and shutdown?                 |
| TRACEREQUESTS  | Tracing Requests.                                     |
| TRACERESPONSES | Tracing Responses.                                    |

Valid "HREF" tag types:

|      |  |
|------|--|
| None |  |
|------|--|

Valid "FOR" loop types:

|      |  |
|------|--|
| None |  |
|------|--|