



White Paper

Fabasoft Folio Portlet

Fabasoft Folio 2023 Update Rollup 2

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1 Introduction

This document describes how to install and configure the Fabasoft Folio Portlet.

2 Prerequisites

System environment: All information contained in this document implicitly assumes a Microsoft Windows or Linux environment.

Supported platforms: For detailed information on supported operating systems and software see the software product information on the Fabasoft distribution media.

Descriptions contained in this document are based on the following software:

- Apache Tomcat 9.0.65
- Eclipse Temurin OpenJDK 8 Update 372 (JRE, HotSpot)
- Liferay Portal CE 7.4 GA51

In the Fabasoft Folio Domain the web service is part of the software product *Fabasoft Folio/eServices* that has to be installed.

3 Installation of the Fabasoft Folio Portlet

This chapter describes the installation of the Fabasoft Folio Portlet.

3.1 Installation and Configuration of Liferay Portal

Liferay Portal comes in a bundle with Apache Tomcat. You can download the package from <http://www.liferay.com>. You also can find additional information about how to install and configure the Liferay Portal at this web site.

3.1.1 Cluster Configuration

A description how to set up an Apache Tomcat cluster environment can be found here:

<http://tomcat.apache.org/tomcat-8.0-doc/cluster-howto.html>











3.2 Installation of the Fabasoft Folio Portlet

To install the Fabasoft Folio Portlet perform the following steps.

1. Run the Fabasoft Server Setup on the server where the Fabasoft Folio eService is installed or should be installed.

2. Select the feature "Fabasoft Folio Portlet". If you do not have installed a Fabasoft Folio eService so far select this service too. Click "Next".

Select Features to Install

- select / deselect all
-  Fabasoft Folio Web Services
-  Fabasoft Folio Conversion Services
-  Fabasoft Folio eService
-  Fabasoft Folio Portlet
-  Fabasoft Folio AT Services
-  Fabasoft Folio IMAP Service
-  Fabasoft Integration for Fabasoft Mindbreeze Enterprise
-  Fabasoft iArchive
-  Fabasoft iArchiveLink
-  Additional Fabasoft Product

3. If all required software is installed, the prerequisites check reports no missing tools.

Review Results of the Prerequisites Check

Status	
The prerequisites check passed.	
Fabasoft Folio eService	✓
Fabasoft Folio Portlet	✓
Fabasoft Integration for Fabasoft app.telemetry	✓

4. Specify an account which is used to run the Fabasoft Folio eService.

Configure Service Accounts

Service Account Details

Fabasoft Folio eService

Username: domain\eservice

Password: ●●●●●●

5. On the summary page in the *Fabasoft Folio eService* area click "Edit" to define the parameters. Afterwards click "OK".

Fabasoft Folio eService

Virtual directory: ESVC

Web site: Default Web Site

CA Certificate (X.509 PEM): Browse...

Server Certificate (PKCS#12): Browse...

Server Certificate Password:

- *Virtual Directory*
Define the name of the virtual directory for the Fabasoft Folio eService. This value is needed at the Folio Portlet configuration. Ensure that this value meets the settings of the Folio Portlet parameters.
- *Web Site*
Defines the web site where the Fabasoft Folio eService runs.
- *CA Certificate (X.509 PEM)*
If own certificates are used select your CA here.
- *Server Certificate (PKCS#12)*
Select the certificate for the web server here.
- *Server Certificate Password*
Type the password for the server certificate here.
Note: If you want that the eService Setup generates the CA and server certificate leave these three fields blank.

6. On the summary page in the Fabasoft Folio Portlet area click "Edit" to define the parameters. Afterwards click "OK".

Fabasoft Folio Portlet

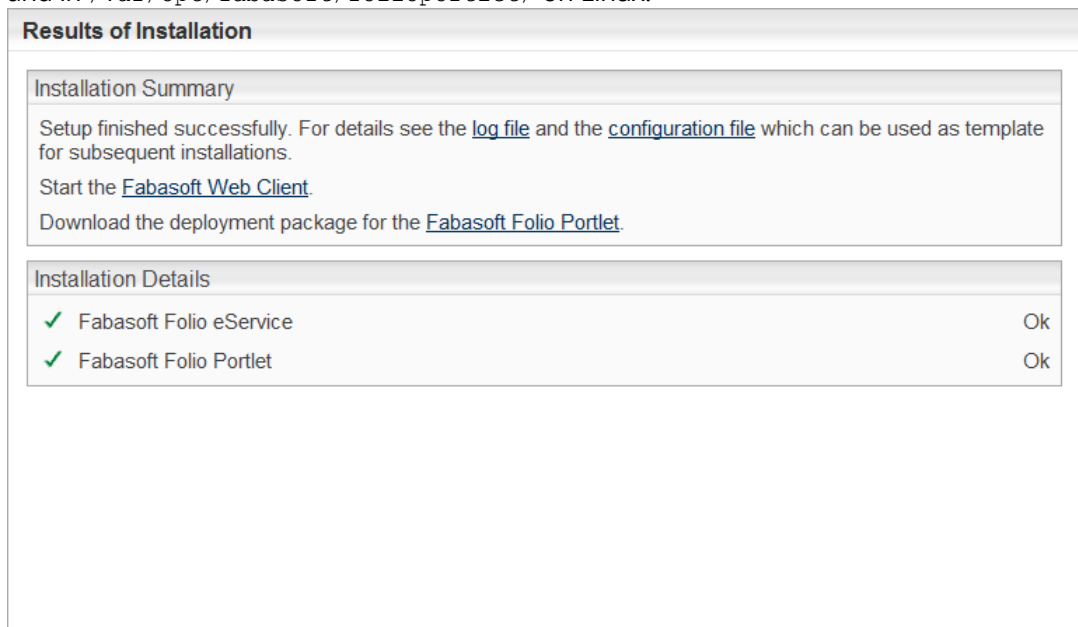
Configure Fabasoft Folio Portlet

Fabasoft Web Service URL	<input type="text" value="https://fscserver/esvc"/>
Folio Portlet Privileged User	<input type="text" value="liferaysvc"/>
Folio Portlet Privileged User Password	<input type="password" value="••••••••"/>
Portal Server IP Address	<input type="text" value="10.10.65.118"/>
Folio Portlet CA Certificate (X.509 PEM)	<input type="text"/> <input type="button" value="Browse..."/>
Folio Portlet Client Certificate (PKCS#12)	<input type="text"/> <input type="button" value="Browse..."/>
Folio Portlet Client Certificate Password	<input type="password"/>

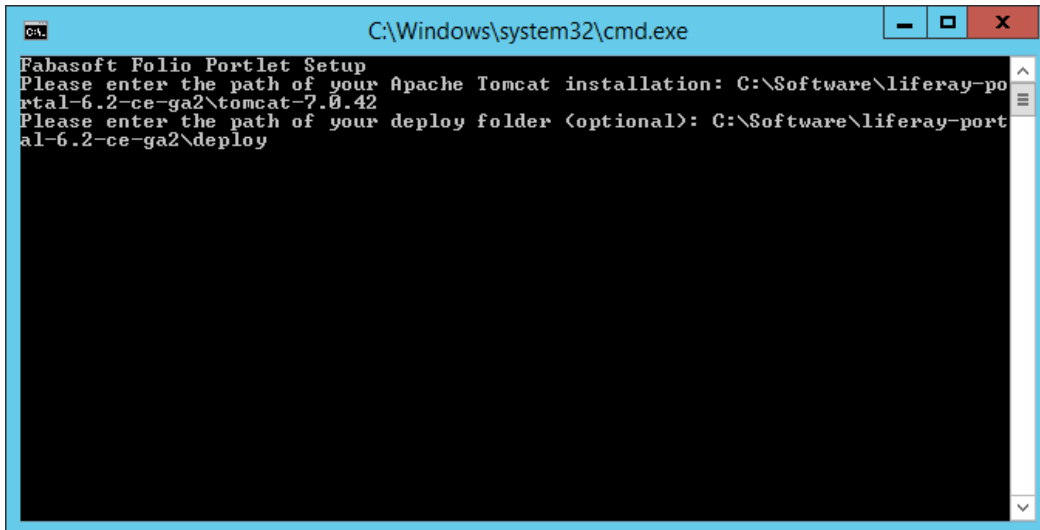
- *Fabasoft Web Service URL*
Specifies the URL to the Fabasoft Folio eService.
Note: The web service must be reachable over HTTPS using a certificate. A not encrypted connection is not accepted by the Fabasoft Folio Web Service. If the certificates should be generated automatically by the Fabasoft server setup define the fully qualified domain name (FQDN) here, otherwise a connection would fail due to a certificate error.
- *Folio Portlet Privileged User*
Specify a username which is used by the Folio Portlet to authenticate at Fabasoft. The Fabasoft server setup creates a *user* in the Fabasoft Folio Domain having this *userlogname*. This user is defined as *privileged user*. On a Microsoft Windows platform this user must exist on the web server.
Note: If the user does not exist as an operating system user the Fabasoft setup will create a local user automatically on Microsoft Windows platforms.
- *Folio Portlet Privileged User Password*
Specify the password of the Folio Portlet Privileged User. This parameter has to be specified only on Microsoft Windows platforms. Default value: *Password1*
- *Portal Server IP Address*
Specify the IP address or CIDR range of the server where the portal server is installed. If the portal server and the Fabasoft Folio eService are installed on the same server specify "127.0.0.1" on Linux or the hosts IP address (e.g. "10.10.x.x") on Microsoft Windows servers. To allow access from a subnet specify a CIDR range (e.g. 10.10.0.0/16). This IP address is necessary to ensure the security with remote user authentication.
- *Folio Portlet Client Certificate (PKCS#12)*
If own certificates are used select your client certificate here which the portal server uses to authenticate at the Fabasoft Folio eService.
Note: The login name of the Folio Portlet Privileged User has to be identical to the common name of the used client certificate for this user. In some cases this login name has to be added manually. See also chapter 5.1 "Portal Service User".

- *Folio Portlet Client Certificate Password*
Type the appropriate password for the client certificate.
- *Folio Portlet CA Certificate (X.509 PEM)*
Select your CA.
Note: If you want that the Folio Portlet Setup generates the client certificate leave these three fields blank.
If an existing SSL web service is used the certificates must be set here anyway. The SSL connection must be set as it requires client certificates and a mapping of the client certificate to the user must be configured.

7. After all parameters are set click "Install".
8. After the Fabasoft Server setup has finished there is a Link to the Fabasoft Folio Portlet deployment package. So you can store the kit to a specific directory. By default it is stored in C:\Program Files\Fabasoft\Components\Setup\Folio Portlet\ on Microsoft Windows and in /var/opt/fabasoft/folioportlet/ on Linux.



9. Extract the package on local directory on the server hosting the Apache Tomcat server.
10. Stop the Apache Tomcat server.
11. Open a command line and switch to the deployment directory. It is important to switch to the deployment directory because otherwise the scripts will not be able to find some necessary files.
12. Run the Fabasoft Folio Portlet deploy script (`portletdeploy.bat` file on Microsoft Windows, `portletdeploy.sh -i` on Linux).



```
C:\Windows\system32\cmd.exe
Fabasoft Folio Portlet Setup
Please enter the path of your Apache Tomcat installation: C:\Software\liferay-portal-6.2-ce-ga2\tomcat-7.0.42
Please enter the path of your deploy folder (optional): C:\Software\liferay-portal-6.2-ce-ga2\deploy
```

The deployment script prompts the user for the path to the Apache Tomcat installation. Specify the full path to the Apache Tomcat server's root directory.

Furthermore the deploy directory can be specified to deploy the Fabasoft Folio Portlet automatically when Apache Tomcat server is started. If this parameter is not specified the Fabasoft Folio Portlet in the `Portlets` subdirectory relatively to the deployment scripts can be used to deploy the portlet.

Note:

- o The `-Dsun.security.ssl.allowUnsafeRenegotiation=true` parameter is added to the `JAVA_OPTS` variable of Apache Tomcat.

13. Start the Apache Tomcat server.

Note: If a user with the given login name already exists, no new service user object is created. Verify that the service user in Fabasoft has got his default role as *Portal Service User*.

4 Configuration of Fabasoft Folio

This chapter describes the configuration of Fabasoft Folio for the usage of the Fabasoft Folio Portlet.

Note: After changing configurations on Fabasoft site as well as on portal server site restart the Apache Tomcat server.

4.1 Automatic User Creation

4.1.1 Fabasoft Folio Portlet Privileged User

Whenever a portal user signs up for an account or an existing portal user accesses a Fabasoft Folio Portlet for the first time, user synchronization automatically triggers the creation of a new Fabasoft Folio Domain user representing the portal user.

To enable communication between the Fabasoft Folio Domain and the portal server a portal service user only designed to connect to the Fabasoft Folio Domain has to be created. This portal service user has to be a privileged user of the Fabasoft Folio Domain.

Verify if a user object for the portal service user exists in the Fabasoft Folio Domain. Open the *Current Domain* object. In the *Privileged Users* property enter the user object of the portal service user.

If the Fabasoft Folio Portlet is installed by the Fabasoft server setup the user should be already defined as privileged user.

Note: If a user with the given login name already exists, no new service user object is created. Verify that the service user in Fabasoft has got his default role as *Portal Service User*.

4.1.2 Fabasoft Folio Group for Portal Users

A group with the login name defined in the `portal-ext.properties` file in the property `fabasoft.liferay.identifier` has to exist in the Fabasoft Folio Domain (see also chapter “6.3 Group Login Name”). If a new user object for a portal user has to be created it is a member of this group.

In this group object the following properties must be defined:

- *Object Class for Created User* (`COOSYSTEM@1.1:gruserclasstempl`)
If the creation of a new user is required an object of this object class is created.
- *Default Environment Template* (`COOSYSTEM@1.1:grenvirontempl`)
In this property the template of a default user environment can be specified.
- *Default Position Template* (`COOSYSTEM@1.1:grpositiontempl`)
In this property the default position for group members can be specified.
- *Domain* (`COOSYSTEM@1.1:objdomain`)
A new user object is created in the domain specified in this property.
Note: The environment variable `homedomain` can be used to define another domain.
If a client domain is specified, this client domain is the default domain of the newly created user object.

Note: This group is only required if user objects for portal users should be created automatically. If this is not desired the user objects can also be created manually.

Analogous to the group login name of the group associated with the portal server, an automatically created user is represented by a user login name `<userid>@<fabasoft.liferay.identifier>`.

`<userid>` is based on a portal server defined value that uniquely identifies a portal user and does not change throughout the portal user's lifetime.

Note: Using Liferay Portal, `<userid>` is based on the internal portal user identifier. The user identifier of a portal user can be determined by means of the so-called “Enterprise Admin” portlet or a database query.

4.2 User Data Synchronization

On the portal server, user data of a portal user can be modified by the user himself or an administrative user. User data synchronization automatically synchronizes available data with the respective user objects in the Fabasoft Folio Domain whenever data changes.

Note: Liferay Portal only provides access to the following user attributes:

- `user.name.family` (Last name)
- `user.name.given` (First name)

- `user.gender` (Gender)
- `user.bdate` (Birthdate)
- `user.home-info.online.email` (Home e-mail address)
- `user.business-info.online.email` (Business e-mail address; identical to home)

In the Fabasoft Folio Domain the synchronization process can be configured via the *Portal Configuration* (FSCPORTAL@1.1001:DefaultConfiguration).

In the *Portal Configuration* user attributes are mapped to Fabasoft Folio properties of the object class *User* (COOSYSTEM@1.1:User) or an alternative object class. The default configuration depends on the Fabasoft edition the Fabasoft Folio Domain is based on. Mappings of attributes to Fabasoft Folio properties can be done here.

The *Portal Configuration* contains a list of mapping aggregates in the property *Mapping List* (FSCPORTAL@1.1001:cfgmapping). This aggregate is comprised of the following properties:

- *Portal User Attribute Name* (FSCPORTAL@1.1001:cfgmappingportaluserattrname)
In this property the source value represented by a user attribute name can be specified. If this property is undefined and *Mapping Expression* (FSCPORTAL@1.1001:cfgmappingexpression) is defined, the source value is determined by the expression evaluation result.
- *Property Path* (FSCPORTAL@1.1001:cfgmappingattrpath)
In this property a list of property definitions can be specified that represent a path to the property that should be synchronized with the source value.
- *Expression to Determine a Property* (FSCPORTAL@1.1001:cfgmappingexpression)
In this property an expression can be specified. If this expression is defined, it can be used to modify or set the source value used for synchronization. The expression evaluation local scope (type: OBJECT) is the object the mapping should be applied to, the global scope (type: DICTIONARY) contains all portal user attribute names and values accessible by name.
- *Apply to* (FSCPORTAL@1.1001:cfgmappingcontexttype)
In this property the object the mapping should be applied to can be specified. "User Object" causes the mapping to be applied to the user object representing the portal user that is the subject of synchronization. "Context Expression" causes the mapping to be applied to an alternative context object determined by the expression *Expression to Determine Mapping Context Object* (FSCPORTAL@1.1001:cfgcontextexpression). The expression evaluation local scope (type: OBJECT) is the user object representing the portal user, the global scope is undefined.

Example:

The *Portal Configuration* contains a list of authorized portals in the property *Authorized Portals* (`FSCPORTAL@1.1001:cfgauthportallist`). In this list the IP address of the portal server and the client certificate of the authorized portal server (`*.cer`) has to be added.

A failure during the synchronization process causes a rollback of all changes.

The default HTTP header name used for passing an authenticated user from a portal server to Fabasoft Folio is "X-FSC-Authenticated-User" and is used by the Fabasoft Folio Portlet and referenced in the default portal configuration in Fabasoft Folio. The property *Header variable to Identify the Authorized User* represents a list of one or more server header variables the authenticated user is retrieved from during authentication. The authenticated user is read from the

first matching HTTP header of an HTTP request. A header must be specified using a "HTTP_" prefix, with special characters replaced by "_", in all-uppercase.

Please note that removing or replacing the default header variable affects the Fabasoft Folio Portlet, the default header variable is required by the integration.

Example: HTTP_X_FSC_AUTHENTICATED_USER

4.3 Configuration of Liferay Portal

The configuration `WEB-INF/classes/portal-ext.properties` contains Fabasoft specific configurations on Liferay Portal site.

The file contains following entries:

`fabasoft.server.urlhead`: Contains the complete web address of the Fabasoft Folio eService

`fabasoft.server.anonymoususer`: The username specified here is used to authenticate at Fabasoft if the user is not signed in at Liferay Portal.

`fabasoft.liferay.identifier`: This value is used to identify the username in Fabasoft. The Fabasoft login name of the user contains the suffix "@<identifier>".

`fabasoft.liferay.baseurl`: This property contains the base web address of the Liferay Portal installation.

`fabasoft.liferay.fschttpservlet`: This property defines how the URL is created, which is used by external user to access Fabasoft Folio objects (e.g. references).

`fabasoft.auth.keystore`: This property specifies the full path to the client certificate which the Liferay Portal service uses to authenticate at Fabasoft.

`fabasoft.auth.keystorepass`: This property contains the password of the certificate.

`fabasoft.auth.truststore`: This property specifies the full path to the store which contains the trusted certificates.

`fabasoft.auth.truststorepass`: This property contains the password of the trust store.

5 Security Aspects and Recommendations

It is recommended to use the following user roles in access control lists to manage the access rights of portal users to the objects in the Fabasoft Folio Domain.

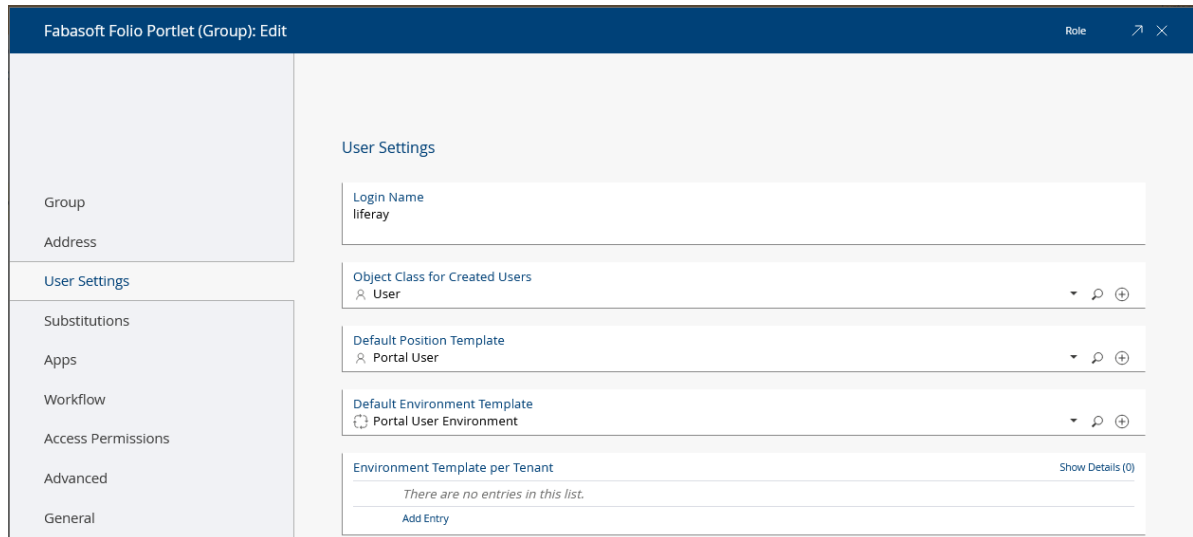
5.1 Portal Service User

To secure traffic between the portal server and Fabasoft Folio a valid user certificate for one specific service user which is trusted by the Fabasoft Folio Web Services is needed. The portal configuration in the Fabasoft Folio Domain contains a mapping between the portal server's IP address and the portal service user's certificate. The common name of this certificate is the login name of the portal service user in Fabasoft Folio. All requests from the portal server are executed in the context of the portal service user. To impersonate a portal user the portal service user has to be a privileged user as described in chapter 4.1.1 "Fabasoft Folio Portlet Privileged User".

5.2 Portal User

Use this position in access control lists for objects in Fabasoft Folio, portal users need to access to.

To make sure that every automatically created user has the *Portal User* role, define a default position template in the Fabasoft Folio group for portal users (see chapter 4.1.2 “Fabasoft Folio Group for Portal Users”).



5.3 Anonymous Portal User

It is highly recommended to assign the role *Anonymous Portal User* to the configured user for the anonymous access and to manage access rights with this position in access control lists for anonymous access to Fabasoft Folio.

Note: All requests originating from the portal server are being processed in the context of this user if the portal user is not logged in to the portal server.

6 Fabasoft Folio Portlet Configuration

The following chapters describe the Fabasoft Folio Portlet configuration.

6.1 How to Change Configuration Files

All the following configurations need to be done in the unpacked `fscportlet.war`. After you unzip the file and completed your changes, you need to create a new WAR file and copy it into the deploy folder.

To create a WAR file with the Java Development Kit, perform the following steps:

1. Open a command prompt.
2. Navigate to the folder containing the unpacked WAR file.
3. Execute the following command to create a new WAR file (make sure that the JDK `jar` command is available in the path or use the fully-qualified path for the command):

```
jar -cvf fscportlet.war *
```
4. Copy the created WAR file into the deploy folder of the Tomcat installation.

5. After deploying the new portlet, all existing portlet instances have to be removed and re-added.

6.2 Anonymous Access (Proxy User / Concurrent User License)

If write access is required, and a concurrent user license is in use, a proxy user can be configured by means of a *Login Name* (COOSYSTEM@1.1:userlogname). A single specific user can be configured in the `portlet.xml`.

```
<portlet>
  <portlet-preferences>
    <preference>
      <name>fabasoft.server.anonymoususerlogname</name>
      <value>projectspecificlogname</value>
    </preference>
  </portlet-preferences>
</portlet>
```

The user with this *Login Name* (COOSYSTEM@1.1:userlogname) must have a user environment (COOSYSTEM@1.1:userenvirons) assigned. All requests originating from a Fabasoft Folio Portlet are being processed in the context of this domain user if the portal user is not logged in to the portal server.

Note:

- As this user has write access to the system any persistent changes may affect all other anonymous users.
- A concurrent user license is required (for details see the license agreement).
- Virtual applications like the desk require a defined proxy user for anonymous access. Otherwise an error message "java.io.IOException: Server returned HTTP response code: 500" is displayed.

6.3 Group Login Name

By default, the Fabasoft Folio Portlet searches for a group in the Fabasoft Folio Domain with a group login name matching the host and port component of the URL the portal was accessed with (e.g. in case of `http://host:port/path`, the group login name is `host:port`). The group represents the given portal, all users created via user synchronization are members of the group.

To enforce a static group login name independent from the request URL, the group login name can be configured in the `portlet.xml`.

```
<portlet>
  <portlet-preferences>
    <preferences>
      <name>fabasoft.liferay.identifier</name>
      <value>projectspecificgrouplogname</value>
    </preferences>
  </portlet-preferences>
</portlet>
```

6.4 Certificates

The `<cacertificate>` file, the certificate of the certification authority, is required.

In a Linux environment the `cert.pem` and the `key.pem` files are required. `cert.pem` is the certificate for the web server. `key.pem` is the private key for the certificate.

In a Microsoft Windows environment a X.509 server certificate is necessary.

To see how to create a `truststore.jks` file refer to the documentation of Sun Microsystems <http://java.sun.com/j2se/1.3/docs/tooldocs/win32/keytool.html>.

In the `portlet.xml` file the following changes have to be taken:

- Under `<portlet-app><portlet><portlet-preferences><preference>`
`<name>fabasoft.auth.keystorepath</name>` type the path of the certificate in the `<value>` tag.
- Under `<portlet-app><portlet><portlet-preferences><preference>`
`<name>fabasoft.auth.keystorepass</name>` type the password of the certificate in the `<value>` tag.
- Under `<portlet-app><portlet><portlet-preferences><preference>`
`<name>fabasoft.auth.truststorepath</name>` type the path of the `truststore.jks` file in the `<value>` tag.
- Under `<portlet-app><portlet><portlet-preferences><preference>` `<name>fabasoft.auth.truststorepass</name>` type the password of the `truststore.jks` file in the `<value>` tag.

Note:

- The path must not end with `"/`.
- The settings in `portlet.xml` are read once when a Fabasoft Folio Portlet is added to a web page. So if you change settings in `portlet.xml` (e.g. the certificate) you have to remove the portlet from the page and add it again.

6.5 Portlet Title

By default, the title is "Fabasoft Folio Portlet". It can be configured in the `portlet.xml` by changing the `portlet-info` tag.

```
<portlet>
  <portlet-info>
    <title>Fabasoft Folio Portlet</title>
  </portlet-info>
</portlet>
```

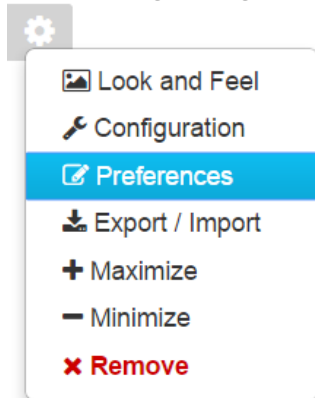
6.6 Error Message

If no connection to the Fabasoft Server can be established, by default the error message "`<portlet title>` is temporarily unavailable." (e.g. "Fabasoft Folio Portlet is temporarily unavailable.") is displayed. This message can be also configured in `portlet.xml`. The key of the related preference is called `fabasoft.portlet.errormsg` OR `fabasoft.portlet.errormsg.<language>` (e.g. `fabasoft.portlet.errormsg.en`) for a language specific message.

```
<portlet>
  <portlet-preferences>
    <preference>
      <name>fabasoft.portlet.errormsg.en</name>
      <value>This e-service is not available.</value>
    </preference>
    <preference>
      <name>fabasoft.portlet.errormsg.de</name>
      <value>Dieses E-Service ist nicht verfügbar.</value>
    </preference>
  </portlet-preferences>
</portlet>
```


6.7 Settings of the Fabasoft Folio Portlet

The following settings can be configured via the “Preferences” of a Fabasoft Folio portlet.



- Host
In this field the URL of the Fabasoft Folio web server has to be defined. For example `http://webserver/fsc`.
- Parameters
In this field the virtual application, which should be displayed in the Fabasoft Folio portlet, has to be specified. For example `ax=COO.1.1001.1.240419`.
- Portlet Width
In this field the width of the portlet can be defined in pixels. By default the portlet is 600 pixels wide.
- Portlet Height
In this field the height of the portlet can be defined in pixels. By default the portlet is 300 pixels high.
- CSS Class
In this field an own CSS class can be defined for the portlet. So it is possible to define portlet specific CSS styles.
- Use Anonymous User
Select this check box, if the portlet should be executed as anonymous user, even for logged in users.
- Display error on session expiration
Select this check box, if the portlet should only be accessible for logged in users. Make sure that the “Use Anonymous User” check box is not selected.

6.8 Session Replication

To enable session replication for the Fabasoft Folio Portlet make sure that the `web.xml` of the portlet contains the `<istributable/>` tag.

6.9 Configure a Special User for Calling a Friendly URL in Fabasoft Folio

The user who is used to call a friendly URL in Fabasoft Folio via the `FscHttpServlet` can be configured with an XML file. The path to the configuration XML file is specified in `web.xml`.

```
<servlet>
  <servlet-name>FscHttpServlet</servlet-name>
  <servlet-class>com.fabasoft.portlet.tools.FscHttpServlet</servlet-class>
```

```
<load-on-startup>1</load-on-startup>
<init-param>
  <param-name>config</param-name>
  <param-value>/WEB-INF/servlet-fshttpervlet.xml</param-value>
</init-param>
</servlet>
```

The XML configuration (`servlet-fshttpervlet.xml`) defines entries for the friendly URLs that should be executed in context of the defined user.

In the following example the friendly URLs `*/cmis$` and `*/demo$` are executed with the users who have the login strings `890@liferay` and `demo`.

Example:

```
<?xml version="1.0" encoding="UTF-8"?>
<!DOCTYPE properties SYSTEM "http://java.sun.com/dtd/properties.dtd">
<properties>
  <entry key="*/cmis$">890@liferay</entry>
  <entry key="*/demo$">demo</entry>
</properties>
```