

# Content Manager

Software Version 24.2

## Mobile App Setup

**opentext**<sup>™</sup>

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## Documentation updates

The title page of this document contains the following identifying information:

- Software Version number, which indicates the software version.
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Many areas of the portal require you to sign in. If you need an account, you can create one when prompted to sign in.

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# Introduction

This document includes high level configuration and setup details required by your organization to allow users to access and use the Content Manager Mobile app.

The Content Manager Mobile app is available as a native application and depending on your device operating system, it can be downloaded from the Google Play Store for Android devices or Apple App Store for Apple devices.

The Content Manager Mobile app allows you to:

- Search for records
- View electronic documents and record properties
- Create new records
- Check Out existing documents for editing using a native application, such as Microsoft Word
- Download documents for offline viewing
- Edit and view Office documents in OneDrive

## Mobile app setup prerequisites

Before you begin, make sure that the following configurations are complete:

- Service API is configured with HTTPS
- Mobile app feature in Content Manager **System Options > Features** tab is enabled
- Content Manager users accessing the integration must have their OpenID Connect details included in their **Location - Network Login** profile

## Supported software requirements

See *Content Manager Specifications and Limitations*, for the supported software requirements of Content Manager Mobile App.

## Setup overview

This section briefly describes the steps you need to perform to setup Content Manager Mobile app on your device.

- **Enable OpenID Connect authentication** - OAuth authentication is managed via OpenID Connect authentication. The authentication is configured in your Identity Provider (e.g. Azure AD) and then the appropriate details are stored in Content Manager in the `hptrim.config` file.
  - **Create or register an app with your Identity Provider** - the Content Manager Mobile app setup requires you to create or register a new app and add API permissions, certificates, secrets, and authentication details.
  - **Edit configuration file** - update the `hptrim.config` configuration file with details required for the Content Manager Mobile app.
- **Verify access to Service API URL** - after completing the setup, verify if you are able to access the Service API URL.

For enabling OpenID Connect authentication, see *Content Manager OpenID Connect authentication* document and configurations specific to Content Manager Mobile app, see [Configurations for Mobile App, below](#).

## Configurations for Mobile App

The Content Manager Mobile App requires an instance of the Service API configured to use OpenID Connect for authentication.

### Service API

The Service API must be installed and must have a valid HTTPS certificate, any HTTP errors will cause the Mobile App to fail.

### Setup script

The simplest way to setup Azure AD and the Service API is to run the setup script which will create:

- an Azure App, and
- sample authentication settings for the **Service API `hptrim.config`**.

To use the script,

1. Install the [Azure CLI](#).
2. [Download](#) and run the script.

**IMPORTANT: New setup script to create new Azure applications**

From 24.3 onwards, as part of Content Manager installation, a new setup script, **az\_install.ps1**, is available at the installation location (for example, **C:\Program Files\Microsoft Focus\ContentManager\Service\_API\office\AzureScript**) to create new Azure app for Content Manager MS Teams and ZFP Office/Outlook integrations.

The administrator must use/run the setup script, **az\_install.ps1**, to create new Azure app.

Once the script is complete there will be a new Azure AD App in your tenant and some sample configuration to be pasted into your **Service API hprim.config** file.

## Manual setup

### Service API configuration

The Service API must be configured to support OpenID Connect authentication. For details, see *Content Manager OpenID Connect authentication* document. In addition, the **hprim.config** file must contain an **add** element with the name **mobile** and the **redirectUri** set to **trimapp://mobile**.

For example,

```
<authentication corsAllowedOrigins="https://mydev.dev:3000" allowAnonymous=="false"
slidingSessionMinutes="30" redirectURI="">
<openIdConnect>
...
<addname="mobile" clientId="[YOUR CLIENT ID]" clientSecret="[YOUR SECRET]"
issuerURI="[YOUR ISSUER URI]" redirectUri="trimapp://mobile"/>
</openIdConnect>
</authentication>
```

### Azure app configuration

Ensure the Azure AD App created in the previous step has the following settings (both all in lower case):

- Authentication > Web > Redirect URIs - [SERVICEAPIURI]/auth/mobile. For example, <https://acme.com/cmserviceapi/auth/mobile>.
- Authentication > Mobile and desktop applications > Redirect URIs - trimapp://mobile.

## Log in to Content Manager Mobile app

To log in to Content Manager Mobile app, perform the following steps:

1. Download and install the Content Manager Mobile app from the Google Play Store or Apple App Store.
2. Open the Mobile app. The Connection URL screen is displayed.
3. Enter the Service API URL and click **Connect**. The Microsoft online log in page is displayed.
4. Enter the user credentials and sign in. The Content Manager Mobile app About page is displayed.