Perceptive Interact for Salesforce Enterprise

Installation and Setup Guide

Version: 3.7.x

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Documentation Notice

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About Perceptive Interact for Salesforce Enterprise

Salesforce is an online, web-based Customer Relationship Management (CRM) application that helps you streamline and automate your business processes. Perceptive Interact for Salesforce Enterprise offers you a web-based solution by combining Perceptive Content capabilities with the Salesforce portal. This solution enables you to manage documents within Salesforce through Interact viewer and perform many of the key tasks that you can perform in the system, such as view, capture and download a document.

Required components

This section provides information about prerequisites and licensing.

Prerequisites

You must have access to the following services before you download the Perceptive Interact package.

- Your organization profile in Salesforce.com with system administrator or equivalent privilege.
- Browser requirement for Interact is IE 11 or higher. Interact also supports the latest version of Chrome, Firefox and other leading browsers.

Before you set up Interact Salesforce Enterprise Viewer, you must have the following software installed on the server machine.

- Apache Tomcat, version 7 or higher
- **fileimageservice** to view and print various type of Microsoft Office documents in the interact viewer

  Note For details, see the *File Conversion Service* user help.
- Perceptive Content Server, version Foundation EP4

  Note For information on installing Perceptive Content server, see the *Perceptive Content Server Installation and Setup Guide* for your environment.
- Perceptive Integration Server, same version as Perceptive Content Server

  Note For information on installing Perceptive Integration Server, see the *Perceptive Integration Server Installation and Setup Guide*.

  Note To ensure that Interact for Salesforce 3.7.x runs smoothly, install the Foundation EP4 version of the Integration Server.You must open the Integration Server installation folder and then navigate to the **integrationserver.ini** file and change the **session.cookie.samesite.policy** property value to **NONE**.

Licenses

This procedure requires the following Perceptive licenses.

- Integration Server for Apps
- Perceptive Combo license

  Note To view forms inside the viewer, you must install the forms license. If the forms license is not installed, to avoid any forms license related issue, ensure that the Display form option under custom settings is deselected.

Install Interact viewer

To install Interact viewer, complete the following steps.

1. Install Perceptive Integration Server.

   Note To install the integration server, refer to the *Perceptive Integration Server Installation and Setup Guide*.

2. Obtain the required installation files from Hyland Software Technical Support group.
3. Unzip **SalesforceApp <*version number*>.zip** file.
4. Copy the files to the relevant directories.
5. Configure Tomcat for non-Single sign-on (SSO) Enterprise.
6. Restart Tomcat.

Obtain and copy the required files

To obtain the product installation files, contact the Hyland Software Technical Support group and then complete the following steps. For a list of Technical Support contact numbers, go to hyland.com/pswtscontact.

1. Get the installation files for Interact for Salesforce, version 3.7.x.
2. Place the **SalesforceApp <version number>.zip** file to a temporary directory on your computer where you have installed Apache Tomcat.
3. To extract the zip file, unzip the **SalesforceApp <version number>.zip** file and open the **SalesforceApp** directory.
4. From the extracted **SalesforceApp** directory, copy the contents of the **application** directory to **[*drive*:]\Program Files\Apache Software Foundation\Tomcat 7.0\webapps\<*appname*>**, where <*appname*> is name of the application. For example, the name of the application is “perceptive”.
5. From the extracted **SalesforceApp** directory, copy the contents of the **pifsauth** directory to **[*drive*:]\Program Files\Apache Software Foundation\Tomcat 7.0\webapps\pifsauth**, where **pifsauth** is name of the application.

Configure Tomcat for non-Single Sign-On Enterprise

To configure Tomcat for a non-Single Sign-On (SSO) Enterprise, complete the following steps.

1. From the extracted **SalesforceApp** directory, open the **tomcat** directory.
2. Copy the content of **lib** directory to the **lib** directory of your Tomcat server. For example, ***C:*\Program Files\Apache Software Foundation\Tomcat 7.0\lib**.
3. In your Tomcat server, open **web.xml** available in **conf** directory to edit.
4. Add the following code snippet at the end of the file and before the **</web-app>** tag.

```
<filter>
    <filter-name>InteractFilter</filter-name>
    <filter-class>com.lexmark.interact.InteractFilter</filter-class>
    <init-param>
      <param-name>SiteName</param-name>
      <param-value>perceptive</param-value>
```

```
    </init-param>
  </filter>
  <filter-mapping>
    <filter-name>InteractFilter</filter-name>
    <url-pattern>/index.html</url-pattern>
  </filter-mapping>
```

Note In the above code snippet, “perceptive” is the application name. Based on your requirement, you can change the application name.

Restart Tomcat

To restart the Tomcat, complete the following step.

- Restart the Tomcat server.

Install package

The Perceptive Interact Enterprise package contains the Interact viewer frame to enable Perceptive document management within Salesforce. After installing the package, you can view external content for configured entities as well as capture documents in context.

To install the package, complete the following steps.

1. Install **Interact for Salesforce** package from https://login.salesforce.com/packaging/installPackage.apexp?p0=04t3m000000kpds.

   Note In case you install the package in a Salesforce sandbox organization, use the link https://test.salesforce.com/packaging/installPackage.apexp?p0=04t3m000000kpds.

2. In the **Package Installation Details** page, complete the following substeps.
   1. Select **Continue** to approve package API access.
   2. Select **Next** to choose the security level.
   3. Under **Select security settings**, select an appropriate access level as per your organization.
   4. Select **Next**.
   5. Select **Install**.

Create connected apps

Create a canvas app to host the Perceptive Interact in Salesforce application.

To create a Perceptive Interact canvas app, complete the following steps.

1. After logging in to the Salesforce Environment with login credentials, at the top of the **Salesforce** page, select the down arrow next to your name and select **Setup** on the menu.
2. In the left pane, under **App Setup**, select **Create** > **Apps**.
3. In the **Apps** page, scroll down to the **Connected Apps** section, and select **New.**
4. In the **New Connected App** page, to specify the basic information, including the app name, logo and contact information, in the **Basic Information** section, perform the following substeps.
   1. In the **Connected App Name** box, type the application name. The name must be unique. You must not reuse an existing name or the name of a deleted connected app. For example, Perceptive Interact Enterprise Canvas App.

    2. In the **API Name** box, type `InteractCanvasAppEnterprise`.
    3. In the **Contact Email** box, type your email ID.
5. In the **API (Enable OAuth Settings)**, select **Enable OAuth Settings** and perform the following substeps to configure authentication settings.
    1. In the **Callback URL** box, type a callback URL. For example, `https://localhost:8443`.

       Note This field is not explicitly used by the application. However, this is a mandatory field. It is recommended that you enter the mentioned URL to prevent any form validation errors.
    2. Under **Selected OAuth Scopes**, select the following option and select .
        - **Manage user data via APIs (api).**
6. In the **Canvas App Settings** section, select **Canvas** check box and perform the following substeps.
    1. In the **Canvas App URL** box, type `https:// <entire server address with port where the Interact viewer is installed>/<webapps folder name>#interactviewer/SFCanvasEnterprise`. For example, type `https://test.perceptivedemo.com/perceptive/#interactviewer/SFCanvasEnterprise`.
    2. Under **Access Method**, select **Signed Request (POST)**. The **Access Method** specifies how the canvas application initiates the OAuth authentication flow.
    3. Under **Locations**, select the location where the canvas app appears to users. Select the **Visualforce Page** option for location.
    4. Click **Save**.

Manage connected app

To edit a connected app, complete the following steps.

1. After logging in to the Salesforce Environment with login credentials, at the top of the **Salesforce** page, select the down arrow next to your name. On the menu, select **Setup** > **Administration Setup** > **Manage Apps** > **Connected Apps**.
2. In the **Connected Apps** page, select the connected apps that you created for Perceptive Interact Enterprise. Select **Edit**.
3. In the **Connected App Edit** page, under **OAuth policies**, select the **Admin approved users are pre-authorized** option in the **Permitted Users** list.
4. In the **IP Relaxation** list, select **Relax IP restrictions**.
5. Click **Save**.
6. In the **Connected Apps** page, select the appropriate canvas app and perform the following substeps.
    1. Scroll down to **Profiles** section and select **Manage Profiles**.
    2. In the **Application Profile Assignment** page, select the appropriate profiles to grant permission to all users through profiles or custom permission set.
    3. Ensure all Salesforce users using this application have been granted the permission **API enabled**.
    4. Click **Save**.

Configure Interact custom settings

To configure Interact custom settings, complete the following steps.

1. At the top of the **Salesforce** page, select **Setup**.
2. In the left pane, under **App Setup**, select **Develop** > **Custom Settings**.
3. In the **Custom Settings** page, under the **Action** column, select **Manage**, available beside **Perceptive Interact Enterprise Settings**.
4. Click **New**.
5. In the **Perceptive Interact Enterprise Settings Edit** page, complete the following substeps.
    1. Optional. To allow downloading documents, select **Enable download document**.
    2. Optional. To view a document in a separate window, select **Open in new window**.
    3. Optional. To display the **@mention** functionality, select **Post capture notification**.
    4. Optional. To display document properties in the document view window, select **Display document properties**. By default, **Display document properties** is selected.
    5. Optional. To display forms in the document view window, select **Display form**.
    6. Optional. To display the thumbnail view in the document view window, select **Display thumbnail**. By default, **Display thumbnail** is selected.
    7. Optional. To work in restricted mode, select **Enable restricted mode**. In restricted mode, you have the following constraints.
        - You cannot view a document in a new window. **Open in new window** does not function.
        - During document capture, the **Capture Document** window does not display the capture properties.
        - In the document viewer, you can view the icon. You can rotate, zoom, adjust the width and height of your document, but you cannot save the changes to your document.
        - In the document viewer, the following buttons are not displayed: **Show or Hide Thumbnails, Show or Hide Forms, Show or Hide Properties, Download Document, Export to PDF, Print Document** and **Download Page.**
    8. Optional. To hide the header in Interact for Salesforce, select **Hide header**.
    9. Optional. To capture a document, select **Enable document capture**. By default, **Enable document capture** is selected.
    10. Optional. To allow null value for document fields, select **Allow null value**.
    11. Optional. To print a document, you must enable the print functionality. To do so, select **Enable print**.
    12. Optional. To view feed notifications after capture, select **Post capture notification**.
    13. Optional. To view documents related to a document displayed in the document view window, select **Display Related Documents**.
    14. Optional. To delete a page from a document displayed in the document view window, select **Enable Delete Page Action**.
    15. Optional. To view version control history for a document, select **Display Version Control History**.

16. Optional. To enable sending a document to ShareBase, select **Enable Send to Sharebase**.
17. Optional. To view tasks related to a document displayed in the document view window, select **Display Related Tasks**.
18. Optional. To add a page to a document displayed in the document view window, select **Enable Add Page Action**.
19. Optional. To enable adding a document to version control, select **Enable Add To Version Control**.
20. Optional. To enable sending a document via email, select **Enable Send Email**.
21. Click **Save**.

Configure the system environment for Salesforce entities

Perceptive Interact Configuration displays Salesforce documents in context of records related to different Salesforce entities. You can configure the view for different Salesforce entities. You can map Salesforce fields to document keys.

To configure the view for different Salesforce entities, complete the following steps.

1. In the **App Menu** list, select **App Launcher** > **Perceptive Interact Enterprise**. To view the Perceptive Interact Enterprise app, you must have **Perceptive Interact Enterprise Admin** permission. For details, refer to the Configure security settings section.

   Note To view Perceptive Interact viewer for a particular Salesforce entity, you need to have access to the specific Visualforce page that is created for that entity, in addition to the assigned permission set. For details, refer to the Configure security settings section.
2. To configure a separate connection with the Perceptive Content environment for Salesforce entities, on the **Perceptive Interact Configurations** tab, select **New**.
3. In the **Perceptive Interact Configuration** dialog box, in the **Tag Object** box, type the Salesforce entity name that you want to map to the Perceptive Interact Configuration record.
4. In the list that displays, select the actual name of the Salesforce entity. This is a required field. For example, if the tag object is Account, type **Acc**, and from the list, select **Account** as the Salesforce entity.

   Note Ensure that you select a valid Salesforce entity as the tag object.
5. In the **Information** section, in the **Capture Profile** list, select a profile to capture the document.
6. In the **Document Properties** section, in the **View** list, select the view in which the document displays.
7. In the **Properties** section, based on the settings you have configured in the **External Application Plan Designer** or **External User Application Plan Designer**, you can view fields. To select the **Filter** check box to select a filter condition during document capture, you must select **Dictionary** as the source in the **Application Plan Designer**.

   Note If the **Filter** check box is enabled, you can apply conditional filtering. By default, **AND** operation is performed.
8. In the **Dictionary Elements** section, perform the following actions.
   1. View the dictionary element names and the corresponding associated target names. For example, if the dictionary element D1 is associated with Field1 and custom property, under **Target**, the target names and the associated dictionary element name display under the **Dictionary**.

Note If Document Type is **Dictionary** which has Document Type as **Target**, the **Source** remains blank and under **Value**, a list appears from where you can select the document category.

2. In the **Source** list, select the type of source. Select one of the following source types as field source.

    - **Salesforce Field** - If you select **Salesforce Field** as source type in the **Source** list, all the relevant salesforce fields with type compatible with the respective custom property type appear in the for selection under **Value.** You must select the corresponding value for the **Salesforce Field** source type, based on the selected **Tag Object**.
    - **Literal**- If you select **Literal** as the source type in the **Source** list, in the **Value** box, provide the appropriate compatible value for the corresponding dictionary field. Select the date for date type custom property and number for number type. If the custom property is string type, type an appropriate value for string type custom property.
    - **Prompt** – If you select **Prompt** as the source type in the **Source** list, the **Value** remains blank and at the time of capturing document, in the **Capture Document** window, the user can provide value.

Note The **Prompt** option appears in the **Source** list, only for the fields that are mapped to dictionary and are marked as user modifiable in the **External User Application Plan**.

9. Click **Save**. A custom page where the Interact for Salesforce Enterprise is tagged for that entity is created automatically.

    Note Ensure that you have the relevant permission to create a Visualforce page in Salesforce. For every Salesforce object where the Interact is tagged, a separate Visualforce page is created automatically. For example, if you save the Interact Configuration details for Lead entity, a Visualforce page is created automatically for the Lead entity. The name of the Visualforce page appears in the following format. If the page is not created automatically, you need to create a page manually. For details, refer to Create a page in Salesforce section.

    - Interact_Ent_<Salesforce entity API name>_Page

Edit the page layout

You can customize the page layouts for record detail and edit pages. The enhanced page layout editor is a feature-rich WYSIWYG tool that allows you to customize the page layouts for your organization for detail and to edit pages in Salesforce.

1. After logging in to the Salesforce Environment with login credentials, you can edit the page layout of a Salesforce object. To edit the page layout of a particular Salesforce object, select any record of that Salesforce object and select the **Edit Layout** option available at the top of that Salesforce object's record page.
2. To add a section, select the category to which the section belongs on the left column of the pane. Drag the section from the pane to the page. On the **Section Properties** dialog box, in the **Section Name** box, type a suitable section name and complete the following substeps.
    1. Select the **1-Column** option as **Layout**.
    2. Clear the **Edit Page** check box.
    3. Click **OK**.
3. In the newly created section, drag the **Visualforce** page, that is, **Interact_Ent_<*Salesforce entity API name*>_Page**, select **Section Properties** and complete the following substeps.

1. In the **Visualforce Page Properties** dialog box, type `100%` in the **Width** (in pixels or percent) box and `650` in the **Height** (in pixels) box.
2. Select **Show scrollbars**.
3. Click **OK**.

Upgrade Interact for Salesforce to 3.7.x

You may need to upgrade if you are currently using an older version of Interact for Salesforce. The upgrade process includes both front end and back end upgrade.To upgrade the front end to 3.7.x, follow the steps as mentioned in the Upgrade the front end section. To upgrade the back end to 3.7.x, follow the steps mentioned in the Upgrade the back end section.

Upgrade the front end

To upgrade the front end of Interact for Salesforce from a lower version to 3.7.x, complete the following steps.

1. Copy the following install package link in the address bar of your browser: https://login.salesforce.com/packaging/installPackage.apexp?p0=04t3m000000kpds.

   Note In case you install the package in a Salesforce sandbox organization, use the link https://test.salesforce.com/packaging/installPackage.apexp?p0=04t3m000000kpds.

2. In the **Upgrade Perceptive Content Interact for Salesforce** page, click **Upgrade**.
3. Click **Done**.

Upgrade the back end

To upgrade the back end of Interact for Salesforce from a lower version to 3.7.x, complete the following steps.

1. Delete the **SalesforceApp** directory from the **webapps** folder where Apache Tomcat is installed.
2. Follow the steps as mentioned in the Install Interact viewer section.

Support for community pages

Community page is a space where you can share information and connect with people who are important to your business process. To get support for your community page, you need to create a new canvas app. According to your choice, you can provide a name for your canvas app.

Note To create a canvas app, follow the steps discussed in Create connected apps section. To manage the connected app, refer to Manage connected app section.

To show Interact for Salesforce in your community page, you need to add the following code snippet. For details, refer to Host Interact for Salesforce in a custom page section.

```
<pvi:interact4sfcomponent hostRecordId="<Record ID to be passed on>"
canvasAppDeveloperName="<Name of your newly created canvas app>"
></pvi:interact4sfcomponent>
```

Configure security settings

The Perceptive Interact package contains the following permission set that enables you view the Interact viewer and administrative section.

- **Perceptive Interact Enterprise Admin** – It is the basic permission set to grant administrative access rights to all Interact related classes and files, including the administrative pages. If this permission set is applied on a user, group, or profile, the particular user, group, or profile enjoys the administrative rights to view, edit, and configure the Interact Salesforce administrative section.

- **Perceptive Interact Enterprise User Base** – It is the base permission set for any Salesforce user to access the underlying Interact classes to view Interact viewer. This permission set will not grant any administrative rights.

To view the Perceptive Interact viewer for a particular Salesforce entity with either of the above permissions, you need to provide the access to the specific Visualforce page that is created for that entity, in addition to the assigned permission set.

For example, to view Interact viewer for the Lead entity, you need to provide access to the page that is created for the Lead entity along with the Perceptive Interact Enterprise User Base permission set.

Similarly, to view the Perceptive Interact viewer for a particular Salesforce entity, you need to provide the access to the specific Visualforce page that is created for that entity, in addition to the Perceptive Interact Enterprise Admin permission set.

Note If the Visualforce page for a particular entity is not created automatically, refer to Create a page in Salesforce.

Assign Permission Set to a user

To assign the either **Perceptive Interact Enterprise Admin** permission set or **Perceptive Interact Enterprise User Base** permission set, complete the following steps.

1. Select **Setup** > **Administration Setup** > **Manage Users** > **Permission Sets**
2. Select the appropriate permission set.
3. Select **Manage Assignments**.
4. Select **Add Assignments** to add a user.
5. From the **View** list, select an appropriate user view.
6. Select the appropriate users.
7. Select **Assign**.

Configure session settings

Salesforce Spring ‘19 release contains new security features that might restrict Perceptive Interact for Salesforce Enterprise from starting. To configure the security settings appropriately and allow the application to launch, complete the following steps.

1. Click **Setup** > **Administration Setup > Security Controls > Session Settings**
2. Under **Whitelisted Domains for Visualforce Inline Frames**, click **Add Domain**.
3. In the **Domain** box, type `https://*.lightning.force.com`.
4. Click **Save**.

   Note If your Salesforce site is mapped to any custom domain, add that domain URL in the Whitelisted Domains list as well.

Create a page in Salesforce

To create a page manually, complete the following steps.

1. After you log in to the Salesforce Environment with login credentials, at the top of the **Salesforce** page, select the down arrow next to your name. On the menu, select **Setup** > **App Setup** > **Develop** > **Visualforce Pages**.
2. In the **Visualforce Pages**, select **New**.
3. In the **Label** box, type the label name that identifies the page.
4. In the **Name** box, type the name of the page. This name must begin with an alphabet and can contain only underscores and alphanumeric characters. It must not include spaces, end with an underscore, or contain two consecutive underscores.
5. Optional. In the **Description** box, type a description for the page.
6. In the **Visualforce Markup** box, type the following code snippet.

```
<apex:page standardController="<standardController name>" showHeader="false" >
    <pvi:Interact4SFComponent canvasAppDeveloperName="
InteractCanvasAppEnterprise”></pvi:Interact4SFComponent>
</apex:page>
```

   For example, the Visualforce page that is used to tag the Product entity in Salesforce consists of the following snippet.

```
<apex:page standardController="Product2" showHeader="false" >
    <pvi:Interact4SFComponent canvasAppDeveloperName="
InteractCanvasAppEnterprise”></pvi:Interact4SFComponent>
</apex:page>
```

7. Click **Save**.

Extend Interact for Salesforce

After capture, arguments and target record ID are published to external Salesforce. To implement this event, complete the following steps.

1. Create one Salesforce apex class that implements the Interact for Salesforce interface. Following parameters are passed through the interface.
   - documentId
   - documentName
   - drawerName
   - field1
   - field2
   - field3
   - field4
   - field5
   - type
   - sfRecordId

- sfObjectType

2. At the top of the **Salesforce** page, select **Setup**.
3. In the left pane, under **App Setup**, select **Develop** > **Custom Settings**.
4. In the **Custom Settings** page, under **Action** column, select **Manage**, available beside **Perceptive Interact Enterprise Settings**.
5. Click **Edit**.
6. In the **Class name** box, type the name of the extended apex class.

   Note While creating the extended apex class, ensure that the apex class name is identical to the name provided in the **Class name** box. The extended apex class name is case sensitive.
7. Click **Save**.

Sample format for extended apex class

An extended apex class format is shown in the following example.

```
global with sharing class InteractApiHandler implements
pvi.InteractApiHandlerInterface {
    global void doPostCaptureTask(Map<string,string> argumentMap){
       system.Debug('Capture parameters -- documentId::' +
argumentMap.get('documentId') +
           ' and name:: ' + argumentMap.get('documentName')
                   + ' and recordId:: ' + argumentMap.get('sfRecordId')
           + ' and objectType:: ' + argumentMap.get('sfObjectType')
           + ' and field1:: ' + argumentMap.get('field1')
           + ' and field2:: ' + argumentMap.get('field2')
           + ' and field3:: ' + argumentMap.get('field3')
           + ' and field4:: ' + argumentMap.get('field4')
           + ' and field5:: ' + argumentMap.get('field5')
           + ' and type:: ' + argumentMap.get('type')
           + ' and drawer:: ' + argumentMap.get('drawerName'));
       }
}
```

Host Interact for Salesforce in a custom page

To host Interact for Salesforce in a custom Salesforce page, you need to provide the parameter name to tag the custom page. Using the `$CurrentPage` global variable, you can access the query string parameters for a page by specifying the parameter attribute, and access each individual parameter. For example, to view all documents related to a particular record in Interact for Salesforce, you must provide the specific record ID in the custom Salesforce page. Below is a sample URL for viewing documents related to a particular Salesforce record in Interact for Salesforce.

https://login.salesforce.com/Interact4CustomCommunityPage?id=001U000000xiUKC&cid=00QU000000L3MgQ

Sample code snippet to host custom component

The following is a sample code snippet for custom component hosting.

```
<pvi:Interact4SFComponent
  hostRecordId="{!$CurrentPage.parameters.cid}"
  canvasAppDeveloperName="<Name of your newly created canvas app>">
  </pvi:Interact4SFComponent>
```

Note In the above example, `cid` is the parameter name that you need to change based on your requirement. There must be a configuration entry for the parameter to tag the custom page.

Migrate Attachments

You can migrate attachments associated with Salesforce objects to Perceptive Content. To migrate attachments, complete the following steps.

1. At the top of the Salesforce page, click **Setup**.
2. In the left pane, under **Administration Setup**, select **Security Controls** > **CORS**.
3. In the **CORS** page, select **New**.
4. In the **Whitelist an Origin** page, type the server URL where the integration server is installed. The URL pattern must include https:// and a domain name, and mention the port number where Tomcat is configured.

Note If SSO is configured, port number is not required.

5. Select **Save**.
6. On the **Migrate Attachments** tab, under **Migrate Attachments To Perceptive Content** complete the following substeps.
    1. Select the relevant object in the **Tag Object** list. This list contains only those objects that are configured for Interact for Salesforce.
    2. Select the relevant file type in the **File Type** section.
    3. Select **Created after** to select the date after which the attachments are considered.
    4. Select **Created before** to select the date before which attachments are considered.
    5. Select **Created between** to select a date range for migrating attachments belonging to that particular date range.
    6. Select the number of days in **Attachments older than <> days**, to migrate attachments older than the number of days mentioned.
7. Select **Migrate**.

Additional setup for Single Sign On

If SSO is configured but fails for a non pop-up authentication, use a pop-up based authentication. You can modify the existing Perceptive Interact canvas connected app with the following additional configuration.

To edit the Perceptive Interact canvas app, complete the following steps.

1. After logging in to the Salesforce Environment with login credentials, at the top of the **Salesforce** page, select the down arrow next to your name and select **Setup** on the menu.
2. In the left pane, under **App Setup**, select **Create** > **Apps**.
3. On the **Apps** page, scroll down to the **Connected Apps** section**.**
4. Select the connected app and click **Edit.**
5. In the **Web App Settings** section, configure the SAML settings as per your organizational setup.
    1. In the Start URL box, type `https:// <entire server address with port where the Interact viewer is installed>/<webapps folder`

name>#interactviewer/SFCanvasEnterprise. For example, type https://test.perceptivedemo.com/perceptive/#interactviewer/SFCanvasEnterprise

6. In the **Canvas App Settings** section, select the **Canvas** check box and complete the following substeps.
    1. In the **Canvas App URL** box, type https:// <entire server address with port where the Interact viewer is installed>**/pifsauth?appId=**<webapps folder name>. For example, if perceptive is the name of the webapps folder, type https://test.perceptivedemo.com/pifsauth?appId=perceptive
    2. Under **Access Method**, select **Signed Request (POST)**. The **Access Method** specifies how the canvas application initiates the OAuth authentication flow.
    3. Under **Locations**, select the location where the canvas app appears to users. Select the **Visualforce Page** option for location.
    4. Click **Save**.

Additional setup for OIDC Connect authentication

OpenID Connect (OIDC) allows users to access the system by authenticating with an external identity provider. To enable OpenID Connect for Perceptive Experience, use a public client and complete the following steps.

Prerequisite

You must configure the Integration Server and Perceptive Content Server for bearer token login. For more information, see the *Perceptive Integration Server Installation and Setup Guide*.

The profile you use must be included in the Bearer Token Login Profiles section of the **integrationserver.ini** and **inserver.ini** files.

Note Hyland IdP, which allows authentication in an iframe, is supported at this time.

1. Stop the web application servers hosting the application.
2. Navigate to the folder on Tomcat/web server where you installed Perceptive Interact for Salesforce.
3. Open the **configs.json** file in a plain-text editor.

   This file is present in the web application installation folder.
4. Under **framework-core** section, change the **clientSession** value to **lesrdl-content-oidc-client:ClientSession**.
5. Under **lesrdl-content-oidc-client** section, complete the following substeps:
    1. Under **clientSession > [profileId]**, configure the bearer token login profile.
    2. Under **profiles > [profileId]**, add the bearer token login profile details.
    3. Update the `issuer` parameter to specify the URL where you can find the OpenID Provider Configuration Document.
    4. Update the `clientId` parameter to specify the unique identifier for your registered application.
    5. Update the `scope` parameter to specify the list of scopes to request while connecting to the Hyland IdP.

Example

```
"lesrdl-content-oidc-client": {
  "clientSession": {
    "profileId": "default"
  },
  "profiles": {
    "default": {
      "issuer": "https://[identity server]/identityprovider",
      "clientId": "[client id on identity server]",
      "scope": "openid profile [… additional scopes]"
    }
    }
}
```

Note: When adding parameters to the **config.json** file, add a comma between two parameters.

6. Save and close the **config.json** file.
7. Restart the web application servers.
8. On the Hyland IdP's client configuration, use the following value for **Redirect URI**:

   https://[server-url]/<perceptive-app-name>/packages/lesrdl-content-oidc-client/redirect/login.html
9. On the Hyland IdP's client configuration, use the following value for **Post Logout Redirect URI**:

   https://[server-url]/<perceptive-app-name>/packages/lesrdl-content-oidc-client/redirect/logout.html

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