



# BEA AquaLogic® Pathways

## Administrator Guide



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# Welcome to AquaLogic Pathways

This book describes how to perform various administration and maintenance tasks for Pathways 1.5.

## How to Use This Book

This book describes how to perform various administration and maintenance tasks for Pathways 1.5.

## Audience

This guide is written for Pathways administrators who are responsible for maintaining the Pathways system.

## Typographical Conventions

This book uses the following typographical conventions.

**Table 1-1** Typographical Conventions

Convention	Typeface	Examples/Notes
<ul style="list-style-type: none"> <li>Items you need to take action on (such as files or screen elements)</li> </ul>	<b>bold</b>	<ul style="list-style-type: none"> <li>Upload <b>Procedures.doc</b> to the portal.</li> <li>To save your changes, click <b>Apply Changes</b>.</li> </ul>
<ul style="list-style-type: none"> <li>User-defined variables</li> <li>New terms</li> <li>Emphasis</li> <li>Object example names</li> </ul>	<i>italic</i>	<ul style="list-style-type: none"> <li>The migration package file is located in <i>install_dir</i>\serverpackages.</li> <li><i>Portlets</i> are Web tools embedded in your portal.</li> <li>The URI <i>must</i> be a unique number.</li> <li>The example Knowledge Directory displayed in Figure 5 shows the <i>Human Resources</i> folder.</li> </ul>
<ul style="list-style-type: none"> <li>Text you enter</li> <li>Computer generated text (such as error messages)</li> <li>Code samples</li> </ul>	computer	<ul style="list-style-type: none"> <li>Type <code>Marketing</code> as the name of your community.</li> <li>This script may generate the following error: ORA-00942 table or view does not exist</li> <li>Example: <pre>&lt;setting name="SSOCookieIsSecure"&gt;     &lt;value       xsi:type="xsd:integer"&gt;0&lt;/value&gt; &lt;/setting&gt;</pre></li> </ul>
<ul style="list-style-type: none"> <li>Environment variables</li> </ul>	ALL_CAPS	<ul style="list-style-type: none"> <li>The default location of <code>BEA_HOME</code> is <code>C:\bea</code>.</li> </ul>

## BEA Documentation and Resources

This section describes other documentation and resources provided by BEA.

**Table 1-2** BEA Documentation and Resources

Resource	Description
Installation and Upgrade Guide	<p>This guide describes the prerequisites (such as required software) and procedures for installing or upgrading AquaLogic Pathways.</p> <p>It is available on <a href="http://edocs.bea.com/pathways/docs15">edocs.bea.com/pathways/docs15</a>.</p>



**Table 1-2 BEA Documentation and Resources**

<b>Resource</b>	<b>Description</b>
Installation Guide	<p>This guide describes the prerequisites (such as required software) and procedures for installing AquaLogic Pathways.</p> <p>It is available on <a href="http://edocs.bea.com/pathways/docs15">edocs.bea.com/pathways/docs15</a>.</p>
Installation Worksheet	<p>This worksheet allows you to record prerequisite information necessary for installing Pathways.</p> <p>It is available on <a href="http://edocs.bea.com/pathways/docs15">edocs.bea.com/pathways/docs15</a>.</p>
Release Notes	<p>The release notes provide information about new features, issues addressed, and known issues in the release.</p> <p>They are available on <a href="http://edocs.bea.com/pathways/docs15">edocs.bea.com/pathways/docs15</a> and on any physical media provided for delivering the application.</p>
Online Help	<p>The online help is written for all levels of Pathways users. It describes the user interface for Pathways and gives detailed instructions for completing tasks in Pathways.</p> <p>To access online help, click the help icon.</p>
Installation Guide for BEA AquaLogic Pathways Browser Plug-in	<p>This guide describes the prerequisites (such as required software) and procedures for installing the Pathways Browser Plug-in.</p> <p>It is available on <a href="http://edocs.bea.com/pathways/docs15">edocs.bea.com/pathways/docs15</a>.</p>
Release Notes for BEA AquaLogic Pathways Browser Plug-in	<p>The release notes provide information about new features, issues addressed, and known issues in the release.</p> <p>They are available on <a href="http://edocs.bea.com/pathways/docs15">edocs.bea.com/pathways/docs15</a> and on any physical media provided for delivering the application.</p>
Deployment Guide	<p>This guide is written for business analysts and system administrators. It describes how to plan your AquaLogic User Interaction deployment.</p> <p>It is available on <a href="http://edocs.bea.com/alui/deployment/index.html">edocs.bea.com/alui/deployment/index.html</a>.</p>
Developer Guides, Articles, API Documentation, Blogs, Newsgroups, and Sample Code	<p>These resources are provided for developers on the BEA dev2dev site (<a href="http://dev2dev.bea.com">dev2dev.bea.com</a>). They describe how to build custom applications using AquaLogic User Interaction and how to customize AquaLogic User Interaction products and features.</p>

**Table 1-2 BEA Documentation and Resources**

<b>Resource</b>	<b>Description</b>
AquaLogic User Interaction (ALUI) and AquaLogic Business Process Management (ALBPM) Support Center	<p>The ALUI and ALBPM Support Center is a comprehensive repository for technical information on ALUI and ALBPM products. From the Support Center, you can access products and documentation, search knowledge base articles, read the latest news and information, participate in a support community, get training, and find tools to meet most of your ALUI and ALBPM-related needs. The Support Center encompasses the following communities:</p> <p><b>Technical Support</b></p> <p>Submit online service requests, check the status of your requests, search the knowledge base, access documentation, and download maintenance packs and hotfixes.</p> <p><b>User Group</b></p> <p>Participate in user groups; view webinars, presentations, the CustomerConnection newsletter, and the Upcoming Events calendar.</p> <p><b>Product Center</b></p> <p>Download product updates, maintenance packs, and patches; view the Product Interoperability matrix (supported third-party products and interoperability between products).</p> <p><b>Developer Center</b></p> <p>Download developer tools, view code samples, access technical articles, and participate in discussions.</p> <p><b>Education Services</b></p> <p>Review the available education options, then choose courses by role and delivery method (Live Studio, Public Classroom Training, Remote Classroom, Private Training, or Self-Paced eLearning).</p> <p><b>Profile Center</b></p> <p>Manage your implementation details, local user accounts, subscriptions, and more.</p> <p>If you do not see the Support Center when you log in to <a href="http://one.bea.com/support">one.bea.com/support</a>, contact <a href="mailto:ALUISupport@bea.com">ALUISupport@bea.com</a> or <a href="mailto:ALBPMSupport@bea.com">ALBPMSupport@bea.com</a> for the appropriate access privileges.</p>

**Table 1-2 BEA Documentation and Resources**

<b>Resource</b>	<b>Description</b>
Technical Support	<p>If you cannot resolve an issue using the above resources, BEA Technical Support is happy to assist. Our staff is available 24 hours a day, 7 days a week to handle all your technical support needs.</p> <p>E-mail: <a href="mailto:ALUISupport@bea.com">ALUISupport@bea.com</a> or <a href="mailto:ALBPMSupport@bea.com">ALBPMSupport@bea.com</a></p> <p>Phone Numbers:</p> <p>USA, Canada +1 866.262.7586 or +1 415.263.1696</p> <p>EMEA +44 1494 559127</p> <p>Asia Pacific +61 2.9931.7822</p> <p>Australia/NZ +61 2.9923.4030</p> <p>Singapore +1 800.1811.202</p>

Welcome to AquaLogic Pathways

# Overview of Pathways

AquaLogic Pathways is a collaborative information discovery and recovery system that provides personal and collective management of enterprise content, helping users more effectively locate, organize, and share information.

Users organize content by using tags, which are meaningful keywords that users create and apply to items and people. If you, the administrator, have defined auto-tags and are running the Auto-Tagging Engine, the system automatically tags items and people that fit the auto-tagging criteria.

Users can search for items and people by creating search queries that can include a combination of text, tags, and properties.

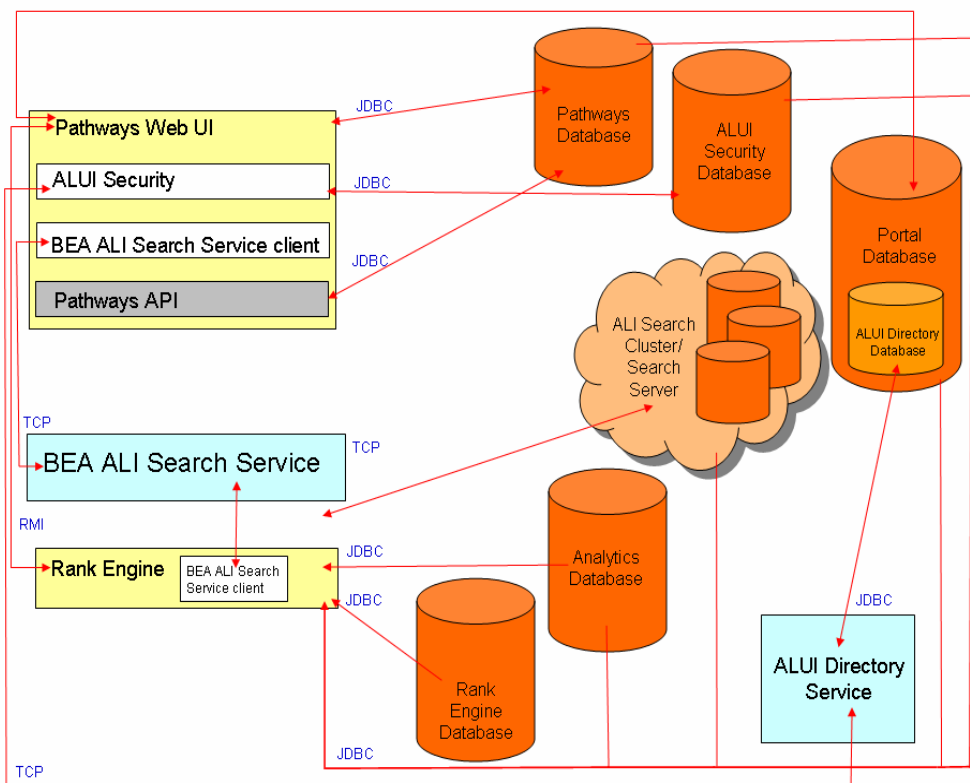
Pathways' system of activity-based ranking orders users' search results; items and people ranked highest appear at the top of users' results, followed by lower-ranked items and people. The rank of an item or person is determined by multiple ranking factors. You, the administrator, specify the relative weight that each ranking factor has on an item or person's rank. Activity-based ranking helps users easily determine which items and people they have collectively found to be useful.

Pathways is integrated with AquaLogic Interaction and AquaLogic Interaction Analytics, using their content aggregation, scanning, indexing, organizing, and identity management features. Optionally, Pathways can be integrated with AquaLogic Interaction Collaboration and AquaLogic Interaction Publisher, enabling users to access and tag their content.

# Components of Pathways

Pathways is comprised of the following components:

Figure 2-1 Pathways Architecture



# Overview of Pathways Components

The following table describes the components available in the Pathways installer. These components provide the functionality described in this guide. For information on installing these components, refer to the *Installation and Upgrade Guide for AquaLogic Pathways*.

**Table 2-1 Pathways components**

Component	Description
Pathways Web UI	<p>The core set of Web UI components that comprise the Pathways application. Pathways application data is stored in the Pathways database. The Pathways Web UI component includes the following:</p> <ul style="list-style-type: none"> <li>• Pathways user interface: Includes Pathways portlets, Simple UI, Enhanced UI, and Pathways Administration interfaces.</li> <li>• ALUI Security: Secures the Pathways application and Pathways objects using the portal's security system.</li> <li>• BEA ALI Search Service client: Integrates Pathways with the BEA ALI Search Service.</li> <li>• Pathways API: Allows a client application to query and manage Pathways objects through simple HTTP requests. For more information, see "About the Pathways API" at <a href="http://e-docs.bea.com/en/alui/devdoc/docs6x/aluidevguide/con_pathwaysapi.html">e-docs.bea.com/en/alui/devdoc/docs6x/aluidevguide/con_pathwaysapi.html</a></li> </ul>
Search Service	Installs the BEA ALI Search Service, which facilitates communication with ALI Search.
Rank Engine	Calculates the ActivityRank for each object in your system. Rank Engine data is stored in the Rank Engine database.
Portal Files (Not pictured in architecture diagram)	<p>The files that are necessary if you want to use adaptive tag libraries with Pathways.</p> <p>Pathways is delivered with a set of Adaptive Tags to add Pathways UI elements to the ALI portal UI, allowing users to access Pathways search from a portal page. For more information, see <a href="http://e-docs.bea.com/alui/devdoc/docs60/Content_Services/Customizing_Plumtree_Search/PathwaysNavigationTags.htm">e-docs.bea.com/alui/devdoc/docs60/Content_Services/Customizing_Plumtree_Search/PathwaysNavigationTags.htm</a></p> <p>This component is installed on the portal server.</p>
Image Service Files (Not pictured in architecture diagram)	The necessary images, styles, user interface controls, .js files, and online help for Pathways. This component is installed on the computer hosting the Image Service.

## Overview of AquaLogic Interaction Components

Pathways is designed to integrate with the AquaLogic Interaction portal. When Pathways is installed, a number of administrative objects, activity rights, and the Pathways Administration Utility are created in the portal.

The following table describes the AquaLogic Interaction components that are used by Pathways.

**Table 2-2 Summary of AquaLogic Components**

Component	Description
Portal Database	<p>The portal database stores portal objects, such as user and group configurations, document records, and administrative objects. The portal database does not store the documents available through your portal. Source documents are left in their original locations.</p> <p>For information on setting up the portal database, see the <i>Installation and Upgrade Guide for BEA AquaLogic Interaction</i>.</p>
Administrative Portal	<p>The administrative portal handles portal setup, configuration, and content. It enables administrative functions, such as creating and managing portlets and other web services.</p> <p>For information on installing the Administrative Portal, see the <i>Installation and Upgrade Guide for BEA AquaLogic Interaction</i>.</p>
Portal	<p>The portal serves end user portal pages and content. It enables end users to access portal content via My Pages, community pages, the Knowledge Directory, and search. The portal also enables some administrative actions, such as setting preferences on portlets or managing communities.</p> <p>For information on installing the portal, see the <i>Installation and Upgrade Guide for BEA AquaLogic Interaction</i>.</p>
Image Service	<p>The Image Service serves static content used or created by portal components. It serves images and other static content for use by the AquaLogic User Interaction system.</p> <p>Whenever you extend the base portal deployment to include additional components, such as portal servers or integration products, you may have to install additional Image Service files. For information on installing the Image Service files for those components, refer to the documentation included with the component software.</p> <p>For information on installing the Image Service, see the <i>Installation and Upgrade Guide for AquaLogic Interaction</i>.</p>



**Table 2-2 Summary of AquaLogic Components**

Component	Description
Search Service	<p>The Search Service returns content that is indexed in the AquaLogic User Interaction system from the portal, Collaboration, and Publisher. The indexed content includes documents, portlets, communities, and users as well as many other AquaLogic User Interaction objects.</p> <p>For information on installing the Search Service, see the <i>Installation and Upgrade Guide for AquaLogic Interaction</i>.</p>
ALUI Directory Service	<p>The ALUI Directory Service enables AquaLogic Interaction to act as an LDAP server, exposing the user, group, and profile data in portal database through an LDAP interface. This enables other ALUI products (and other third-party applications) to authenticate users against the portal database.</p>
Automation Service	<p>The Automation Service runs jobs and other automated portal tasks. You run jobs to perform tasks such as crawling documents into the Knowledge Directory, synchronizing groups and users with external authentication sources, and maintaining the search collection.</p> <p>For information on installing the Automation Service, see the <i>Installation and Upgrade Guide for AquaLogic Interaction</i>.</p>
Document Repository Service	<p>The Document Repository Service stores content uploaded into the portal, Collaboration, or Publisher.</p> <p>For information on installing the Document Repository Service, see the <i>Installation and Upgrade Guide for AquaLogic Interaction</i>.</p>
AquaLogic Notification Service	<p>The AquaLogic Notification Service sends e-mail notifications to users.</p> <p>For information on installing the AquaLogic Notification Service, see the <i>Installation and Upgrade Guide for AquaLogic Interaction</i>.</p>

## Overview of Pathways

# Defining Pathways Tag Behavior

This chapter provides information on defining Pathways tag behavior. It includes the following sections:

- [Restricting and Deleting Tags](#)
- [Defining Auto-Tags](#)
- [Installing and Configuring the Auto-Tag External Operation](#)
- [Performing a Tag Rebuild Operation](#)
- [Defining Tag Display Behavior](#)

## Restricting and Deleting Tags

This section discusses the following:

- [Restricting Tags](#)
- [Deleting Tags](#)

### Restricting Tags

You can restrict a tag to prevent users from creating a tag with a particular name. For example, you might want to restrict users from creating tags that include profane language or outdated product names. When you restrict a tag, you create a tag and assign the Restricted property to that tag.

**Note:** If you restrict a tag that has already been created, you must delete the tag to remove all of the tag's previously-applied instances from the system.

To restrict a tag:

1. Click **Administration**.
2. From the Select Utility drop-down list, click **Pathways Administration**.
3. Navigate to the **Tags** tab, **General** page.
4. Click **Add**.  
The Tag Details area of the page appears.
5. Type the name of the tag that you want to restrict into the **Tag Name** box.
6. Select **Restricted**.
7. Click **SAVE**.

## Deleting Tags

This section describes how to delete tags from the system. When you delete a tag using Pathways Administration, you delete all of the tag's associations to items and people.

To delete a tag:

1. Click **Administration**.
2. From the Select Utility drop-down list, click **Pathways Administration**.
3. Navigate to the **Tags** tab, **General** page.
4. In the Tags table, select the check box next to the tag name that you want to delete.
5. Click **Delete**.  
A confirmation dialog box appears.
6. Click **OK**.

## Defining Auto-Tags

Pathways Administration lets you create, edit, and delete the rules that Pathways uses to apply auto-tags to items and people. This section discusses:

- [Overview of Auto-Tags and Auto-Tag Rules](#)
- [Creating Auto-Tag Rules](#)
- [Running the Auto-Tagging Engine](#)
- [Removing Auto-Tags](#)

## Overview of Auto-Tags and Auto-Tag Rules

An auto-tag is a tag that Pathways automatically associates to items and people. Users can choose to display or hide auto-tags on the Pathways Preferences page.

An auto-tag rule is a rule that you create that defines the conditions for when Pathways applies a specific tag to an object.

When you create an auto-tag rule, you associate it to a target, which can be either a container or class of objects that Pathways analyzes and potentially auto-tags. Examples of targets are the Knowledge Directory (container of AquaLogic Interaction objects), Portlets (class of AquaLogic Interaction objects), Projects (container and class of Collaboration objects), and Discussions (class of Collaboration objects).

If you create a rule that is associated to a high-level target such as all Collaboration documents, Pathways applies tags to all Collaboration documents that meet the conditions in your rule. If you create a rule that is associated to a lower-level target such as a specific Collaboration document folder, Pathways applies tags to only the documents in the specified Collaboration document folder that meet the conditions in your rule. You can create multiple rules for the same target.

Following are some examples of how you can use auto-tagging:

- Apply a *Beverly Hills* tag to all people in a specific Admin Folder whose Postal Code is 90210.
- Apply a *BEA* tag to all Collaboration documents that contain the text *@bea.com*.
- Apply tags with the names of the managers of all AquaLogic Interaction users who do not work in the Human Resources department.

## Creating Auto-Tag Rules

This section discusses how to create rules that Pathways uses to associate auto-tags to items and people.

To create an auto-tag rule:

1. Click **Administration**.
2. From the Select Utility drop-down list, click **Pathways Administration**.
3. Navigate to the **Tags** page, **Auto-Tagging** page.
4. Click **Browse** to launch the Target Path dialog box.
5. Select the path to the target that contains the objects to which you want to apply the auto-tagging rule.

Selecting **All** adds every subobject to the target.

6. Click **OK**.

The path to the target is displayed in the Target box.

7. Perform the following steps to specify what you want Pathways to look for in the target objects:

- a. From the Rule row's first drop-down list, choose the property that you want Pathways to analyze.

For example, if you want Pathways to check if the target object has Chris Medinger as a particular author, first choose **Author** (this example will continue in Steps b and c).

**Note:** Choose **Full Text Content** if you want Pathways to search for a string in the target.

- b. From the Rule row's second drop-down list, choose **contains** or **does not contain** to apply a condition to the rule.

Using the example, choose **contains** for Pathways to check for objects that were authored by Chris Medinger.

- c. In the Rule row's text box, type the value that you want Pathways to search for in the target.

If the property that you chose either contains or does not contain the value that you type (depending on the option that you chose in Step b), Pathways will apply a tag to the object.

Using the example, type "Chris Medinger" to complete the process of specifying that Pathways search for Chris Medinger as the author of target objects.

8. Perform the following steps to specify the tag that you want Pathways to apply to objects that meet the criteria you specified in Step 4:

- a. From the Apply Tag row's drop-down list, choose the property whose value you want Pathways to use when generating the tag's value. (You can also choose **String** to specify the exact text of the tag.)
 

Using the example, if Chris Medinger was the author of an object and you want to want "Chris Medinger" to be the tag's value choose the **Author** property.
  - b. If you chose **String**, type the text that you want included in the tag.
9. Click **Preview** to display a table that includes all of the current objects that will be auto-tagged by this rule.
  10. Click **Save**.

## Previewing the Effected Objects of Auto-Tag Rules

For each auto-tag rule, you can view a table that includes all of the current objects that will be auto-tagged by that rule when you run the Auto-Tagging Engine.

To preview the effected objects of auto-tag rules:

1. Click **Administration**.
2. From the Select Utility drop-down list, click **Pathways Administration**.
3. Navigate to the **Tags** tab, **Auto-Tagging** page.
4. Click the name of the auto-tag rule whose effected objects you want to view.
5. The auto-tag rule appears in the **Rules** area.
6. Click **Preview**.

A window appears that displays the names of the objects that will be auto-tagged by the rule when you run the Auto-Tagging Engine.

## Running the Auto-Tagging Engine

The Auto-Tagging Engine applies auto-tags to objects by using the rules that you create.

When you run the Auto-Tagging Engine, Pathways deletes all auto-tags from the system, then re-applies all auto-tags again. For this reason, if you edited a rule since the last time you ran the Auto-Tagging Engine, Pathways deletes the auto-tags that were applied by the old rule and re-applies auto-tags using the updated rule.

**Note:** You cannot add or delete rules when the Auto-Tagging Engine is running.

To run the Auto-Tagging Engine:

1. Click **Administration**.
2. From the Select Utility drop-down list, click **Pathways Administration**.
3. Navigate to the **Tags** tab, **Auto-Tagging** page.
4. In the Status area, click **Start**.

## Removing Auto-Tags

When you remove auto-tags, you remove all of Pathways' currently-applied auto-tags.

To remove auto-tags:

1. Click **Administration**.
2. From the Select Utility drop-down list, click **Pathways Administration**.
3. Navigate to the **Tags** tab, **Auto-Tagging** page.
4. In the Remove All Auto-Tags area, click **Remove Auto-Tags**.

# Installing and Configuring the Auto-Tag External Operation

The Auto-Tagging Engine applies auto-tags to items and people using rules that you create on the Auto-Tagging page of Pathways Administration.

If you want the Auto-Tag Engine to run periodically as an Automation Service job, you must install the Auto-Tag external operation on the Automation Service host.

**Note:** This procedure is optional. If you do not perform this procedure, you can manually run the Auto-Tag Engine by clicking **Start** on the Tags tab, Auto-Tagging page in Pathways Administration. For details, see *AquaLogic Pathways Online Help*.

To install and configure the Auto-Tag external operation:

1. Log in to the Automation Service host computer as the local administrator (on Windows) or as a user with directory write privileges (on UNIX).
2. Copy the installer to the disk location from which you plan to launch it.
3. Launch the Pathways installer:



- On a Windows host, run **ALPathways\_v1-5.exe**.
  - On a UNIX host, run **ALPathways\_v1-5**.
4. Complete the installer wizard pages:
    - Choose to perform a custom installation.
    - Choose to install the Pathways Web UI component only.

**Note:** You only need to install the Pathways Web UI component to install the Auto-Tag external operation, which is included in the Pathways Web UI component. You do not need to use the Pathways user interface on the Automation Service host computer.
  5. Launch Configuration Manager and enter database and connectivity settings into the Pathways application sections (you do not need to enter settings for the Rank Engine section).  
 For details on accessing Configuration Manager, see *Installation and Upgrade Guide for BEA AquaLogic Pathways*.
  6. On the Automation Service host computer, copy the scripts located in *install\_dir\pathways\ProductVersion\scripts* to the following location: *install\_dir\ptportal\6.5\scripts*.
  7. Log in to the portal as a user with administrative privileges.
  8. In Administration, use the migration utility to import the **pathways\_autotags\_ext\_op.pte** migration package, located in *install\_dir\pathways\ProductVersion\serverpackages* on the Pathways host.
  9. Edit the **Pathways Auto-Tag** external operation, located in the **Pathways** administrative folder.
  10. In the **Operating System Command** box, perform the following:
    - **(UNIX only)** Change the extension of the PathwaysAutotag.bat file by replacing *.bat* with *.sh*.
    - If your API Service does not use the 11905 default port number, replace *11905* in *<localhost:11905>* with the correct port number.
    - If your API Service is not installed on the same computer as the Automation Service that will be assigned to execute the external operation job, replace *localhost* in *<localhost:11905>* with the fully-qualified domain name.

You can now use the Automation Service utility to schedule a job that periodically runs the Auto-Tagging Engine.

## Performing a Tag Rebuild Operation

If you are concerned that the Pathways database and search index are out of sync, you might want to perform a Tag Rebuild operation. A Tag Rebuild operation:

- Re-indexes tags in the search index by deleting then repopulating all tags in the search index.
- Removes tags that were applied to items that were subsequently deleted from the portal, Collaboration, and Publisher.

**WARNING:** Do not perform the Tag Rebuild operation before re-indexing the portal and/or Collaboration search indexes. If you perform the Tag Rebuild operation before re-indexing the portal and/or Collaboration search indexes, Pathways might permanently delete some tags.

Perform tasks in the following order: 1. Re-index the portal search index; 2. Re-index the Collaboration search index; 3. Perform the Tag Rebuild operation

To perform a Tag Rebuild operation:

1. Click **Administration**.
2. From the Select Utility drop-down list, click **Pathways Administration**.
3. Click the **General** tab.
4. In the Tag Rebuild area, click **Start**.

## Defining Tag Display Behavior

This section describes how to specify the number of top tagged search results that Pathways scans when determining the popular and related tags to display in the tag lists/tag clouds of the Search pages, Pathways Items portlet, and Pathways People portlet.

To define tag display behavior:

1. Click **Administration**.
2. From the Select Utility drop-down list, click **Pathways Administration**.
3. Click the **General** tab.

4. In the **Analysis Sample Size** box, type the number of tagged search results that you want Pathways to scan when determining the popular and related tags to display in the tag lists/tag clouds of the Search pages, Pathways Items portlet, and Pathways People portlet.  
**Note:** The Analysis Sample Size setting also specifies the number of user-clicked results -- regardless of tags -- that Pathways scans when determining subject matter experts.
5. Click **SAVE**.

## Defining Pathways Tag Behavior

# Defining ActivityRank and Search Results Behavior

This chapter provides information on managing the calculation of ActivityRank and how Pathways orders search results and determines subject matter experts. It includes the following sections:

## Defining ActivityRank Behavior

This section discusses the following:

- [Overview of ActivityRank and the Rank Engine](#)
- [Tuning Rank Factors](#)
- [Managing Click View Expiration](#)

## Overview of ActivityRank and the Rank Engine

The Rank Engine periodically queries various repositories in the system to gather historical activity data for each object. After saving this data, the Rank Engine uses the settings that you configure on the Rank Factors page to calculate the ActivityRank of the items and people in the Pathways system. The Rank Engine calculates ActivityRank using the settings that you tune on the Rank Factors page.

In Pathways, "value flows from one object to another". This statement means that the Rank Engine uses the ActivityRanks of source objects to calculate the ActivityRanks of target objects (where the source object performs the action on the target object).

For example, because John Hill (source object) authored (action) a Sales Spreadsheet document (target object), his ActivityRank impacts the ActivityRank of the Sales Spreadsheet document.

Note that items and people can be both source objects and target objects. Using the example, the ActivityRank of the Sales Spreadsheet document (source object) impacts the ActivityRank of John Hill (target object). If nobody views, edits, or tags the Sales Spreadsheet document, it will most likely have a lower ActivityRank than documents that have been viewed, edited, or tagged a number of times. In this case, the Sales Spreadsheet document is the source object and John Hill is the target object. Note that even though the Sales Spreadsheet did not perform a true action on John, Pathways registers an action from the spreadsheet to John in order to calculate the spreadsheet's influence on John's ActivityRank.

When working in the Rank Factors page, you would tune *The rank of the author* in the Items area of the Rank Factors page to adjust the amount of value that John Hill's ActivityRank will contribute towards calculating the ActivityRank of the Sales Spreadsheet document. You would tune *The rank and number of pages authored* in the People area of the Rank Factors page to adjust the amount of value that the Sales Spreadsheet's ActivityRank will contribute towards calculating John Hill's ActivityRank.

### Rank Engine Service

The Rank Engine is run as the **BEA AL Pathways Rank Engine** service in Windows. To run the Rank Engine in UNIX, run the following command from the command line:

```
<install_dir>/rankengine/<version>/bin/rankEngineService.sh
```

*Install\_dir* is the installation location of the **pathways** directory. By default, the value for *install\_dir* is:

- /opt/bea/alui (UNIX/Linux)
- C:\bea\alui (Windows)

## Tuning Rank Factors

A rank factor is an adjustable setting that determines the amount of influence that the ActivityRank of one object type has on the ActivityRank of another object type.

This topic describes how to adjust rank factors using the Rank Factors page.

Use the Rank Factors area on the Rank Factors page to adjust the global influence that each rank factor has on the ActivityRank of items and people. For each rank factor, adjust the slider or type a value from 0% 100%. For important information on how ActivityRank is calculated and the

relative relationship that rank factors have to each other, see [“Special Tuning Considerations” on page 4-6](#).

The following table lists each rank factor in the Items section of the Rank Factors page. For each rank factor, the table lists:

- The source object whose ActivityRank influences the ActivityRank of the target object.
- The action that the source object performs on the target object to influence its ActivityRank.
- The target object.

**Table 4-1 Items -- Rank Factor Activity Flow**

Rank Factor	Source Object	Action	Target Object
The rank of the author  <b>Note:</b> For this rank factor, Pathways considers authored items to be Collaboration discussion messages.	person	authors	item
The rank of the submitter (if author is unknown)  <b>Note:</b> For this rank factor, Pathways considers submitted items to be documents uploaded to Collaboration or manually submitted to the Knowledge Directory.	person	submits	item
The rank and number of people who edit  <b>Note:</b> For this rank factor, Pathways considers edited items to be documents edited in Collaboration.	person	edits	item
The rank and number of people who add as a favorite	person	Adds to My Favorites list	item

**Table 4-1 Items -- Rank Factor Activity Flow**

<b>Rank Factor</b>	<b>Source Object</b>	<b>Action</b>	<b>Target Object</b>
The rank and number of people who tag	person	applies tag	item
The rank and number of people who view	person	views	item

The following table lists each rank factor in the People section of the Rank Factors page. For each rank factor, the table lists:

- The source object whose ActivityRank influences the ActivityRank of the target object.
- The action that the target object performs on the source object.
- The target object.

**Note:** For the rank factors below, the ActivityRanks of the source objects influence the ActivityRanks of the target objects, even though the target objects actually perform the actions on the source objects. For example, when a person authors an item, the item's ActivityRank influences the author's ActivityRank.



**Table 4-2 People -- Rank Factor Activity Flow**

<b>Rank Factor</b>	<b>Source Object</b>	<b>Action</b>	<b>Target Object</b>
The rank and number of items authored	item	is authored by	person
<b>Note:</b> For this rank factor, Pathways considers items to be Collaboration discussion messages.			
The rank and number of items submitted	item	is submitted by	person
<b>Note:</b> For this rank factor, Pathways considers items to be documents uploaded to Collaboration or manually submitted to the Knowledge Directory.			
The rank and number of items edited	item	is edited by	person
<b>Note:</b> For this rank factor, Pathways considers items to be documents edited in Collaboration.			
The rank and number of people who have this person as contact	person	is added to Contacts list by	person
The rank and number of people who tag	person	is tagged by	person
The rank and number of people who view	person	is viewed by	person

### Recommended Process for Tuning Rank Factors

We recommend that you use the following iterative process to tune rank factors. Repeat this process until you are satisfied with the ActivityRanks of your search results:

1. Type a search query and perform a search.

Use the same search query each time you repeat this process.

2. Notice the order of your search results and their individual ActivityRanks.

To view an object's ActivityRank, ensure that the **Scores** check box is enabled on the Pathways Preferences page. In the search results, hover your mouse over an object's score. The object's ActivityRank appears as a tooltip.

3. Tune rank factors as desired.
4. Run an incremental update of the Rank Engine on the Schedule And Status page. For details, see [“Performing On-Demand Incremental Updates” on page 5-1](#).

**Note:** To save time, allow only the first incremental update to complete all stages. With each subsequent incremental update, use the option **Start over and skip the data gathering phase**.

## Special Tuning Considerations

Take careful note of these points when tuning the Rank Engine:

- When you tune any rank factor, you are adjusting the influence that the ActivityRanks of the source objects have when calculating the ActivityRanks of *all relevant target objects*.

For example, adjusting *The rank of the author* adjusts the ranks of all items that have been authored. In other words, the ActivityRanks of the authors impact the ActivityRanks of all items that they have authored.

- The tuning of rank factors is relative; this is the case no matter how many rank factors affect that item or person. When you tune a rank factor, you are adjusting its influence relative to the other rank factors that impact an item or person. The following table lists the rank factors that impact the ActivityRanks of Item A and Item B (tunings are in parenthesis):

**Table 4-3 Rank Factors Example**

Item A Rank Factors	Item B Rank Factors
The rank of the author (75%)	The rank of the author (75%)
The rank and number of people who edit (85%)	The rank and number of people who edit (85%)
The rank and number of people who tag (95%)	The rank and number of people who view (15%)

As you can see, the ActivityRank of Item A is most influenced by *The rank and number of people who tag*, which is set to 95%. The ActivityRank of Item B is most influenced by *The rank and number of people who edit*, which is set to 85%. Although *The rank and number of people who edit* is tuned to the same position globally, it has more influence on the ActivityRank of Item B than it has on the ActivityRank of Item A.

- In order for your rank factor tunings to take effect, you must use the Schedule And Status page to recalculate ActivityRanks. In many cases the **Start Over and skip the data gathering phase** option is the most efficient way to update your system's ActivityRanks. For details, see [“Performing On-Demand Incremental Updates” on page 5-1](#).
- Try to adjust as few rank factors at a time and adjust those rank factors in small increments. Depending on the history of actions in your system, making adjustments to the rank factors might greatly impact the ordering of result sets.

## Managing Click View Expiration

This topic discusses how to enable and disable click view expiration. When click expiration is enabled, the Rank Engine does not use item click views that are older than the specified number of weeks to calculate ActivityRank.

**Note:** Regardless of your click expiration settings, the Rank Engine calculates an item or person's ActivityRank by using only the most recent click of each person who has viewed that item or person. This restriction alleviates the chance of an item or person rising to the top of a result set due to multiple clicks by a single person.

To enable and disable the expiration of item click views:

1. Click **Administration**.
2. From the Select Utility drop-down list, click **Pathways Administration**.
3. Navigate to the **Rank Factors** tab, **Rank Factors** page.
4. In the **Click Expiration** area, perform one of the following:
  - To enable click expiration, click **Yes**. Then specify the period of time after which item click views expire by choosing a value from the **Number of Weeks** drop-down list.
  - To disable click expiration, click **No**.
5. Click **SAVE**.

## Defining Search Results Behavior

This section discusses the following:

- [Configuring User Properties in Search Results](#)
- [Defining Text Match Importance](#)
- [Defining the Calculation of Subject Matter Experts](#)

### Configuring User Properties in Search Results

Pathways lets you choose the user properties that you want to be displayed in search results of the People tab and Pathways People portlet.

To configure user properties in search results:

1. Click **Administration**.
2. From the Select Utility drop-down list, click **Pathways Administration**.
3. Click the **UI Preferences** tab, **People** page.
4. Click **Add/Remove User Properties**.

The Choose Properties dialog box appears.

5. Choose the user properties that you want to appear in search results.

**Note:** See AquaLogic Interaction documentation for instructions on how to change the user properties that are available in the Choose Properties dialog box. You must configure properties as searchable in their respective property editors.

6. Click **OK**.

You are returned to the People page.

7. Perform any of the following for any user properties, as desired:
  - In the **Order** column, click the buttons to arrange the order of how user properties appear in search results.
  - In the **Display Name** column, type an alias name that you would like to assign to the portal user property. This alias appears in the search results instead of the original portal user property name.

- In the **Hyperlink** column, view whether the user property is visible as a hyperlink or not. To change whether a user property is visible as a hyperlink or not, navigate to the property's Main Settings page in portal Administration, select **Treat this property like an URL**, and click **Finish**.
- In the **Image** column, select to display the property as an image. The value for this property must contain a valid image URL that is accessible by the user viewing the Pathways result set.
 

**Note:** When this option is cleared, Pathways displays the text of the property instead of its image. For example, Pathways displays the actual URL ending with .jpg instead of the image that exists at that URL.
- In the **Summary** column, select the properties which will be displayed as columns in the result sets for people (Enhanced Mode only). Users access an item or person's summary in their search results.

## Defining Text Match Importance

This section describes how to specify the relative weight that Pathways gives to a text match on the Tags search field when ordering search results. Applying more weight to the Tag search field increases its relevancy ranking; applying less weight to the Tag search field decreases its relevancy ranking.

To manage the relative weights for non-tag fields, and add and remove search fields, navigate to the **Administration>Search Results Manager>Banner Fields** page, and edit as desired.

To define the importance that text matches have on the order of search results:

1. Click **Administration**.
2. From the Select Utility drop-down list, click **Pathways Administration**.
3. Click the **General** tab.
4. In the table, type a weight for the **Tag** search field.
 

To attach more weight to the Tag search field, increase the weight number.
5. Click **SAVE**.

## Defining the Calculation of Subject Matter Experts

This section describes how to specify the number of user-clicked results that you want Pathways to scan when determining subject matter experts. Subject matter experts are the people that are displayed in the People tab and the Pathways People portlet.

To define subject matter expert calculation:

1. Click **Administration**.
2. From the Select Utility drop-down list, click **Pathways Administration**.
3. Click the **General** tab.
4. In the **Analysis Sample Size** box, type the number of results that you want Pathways to scan when determining subject matter experts.

**Note:** The Analysis Sample Size setting also specifies the number of tagged search results that Pathways scans when determining the popular and related tags to display in the tag lists/tag clouds of the Search pages, Pathways Items portlet, and Pathways People portlet.

5. Click **SAVE**.

# Managing the Rank Engine Database

This chapter provides information on using the Pathways Administration Utility. It includes the following sections:

- [Performing Incremental Updates of the Rank Engine Database](#)
- [Performing Full Updates of the Rank Engine Database](#)
- [Viewing the Status of a Rank Engine Database Update](#)
- [Stopping Rank Engine Database Updates](#)

## Performing Incremental Updates of the Rank Engine Database

Use the Incremental Update area to perform a partial update of the Rank Engine database, either on demand or on a schedule. When you run an incremental update, the Rank Engine's database is only updated with the data that has changed since the last Data Gathering phase occurred.

This section discusses:

- [Performing On-Demand Incremental Updates](#)
- [Scheduling Incremental Updates](#)

## Performing On-Demand Incremental Updates

To perform an on-demand incremental update:

1. Click **Administration**.
2. From the Select Utility drop-down list, click **Pathways Administration**.
3. Click the Rank Factors tab, **Schedule And Status** page.
4. In the Incremental Update area, click **Run Once Now**.
5. Click one of the following:
  - **Start over:** Start an incremental update beginning at the Data Gathering phase.
  - **Start where we left off:** Start an incremental update at the point where the previous incremental update stopped.

This option is useful when the BEA AL Pathways Rank Engine Service is stopped in the middle of an incremental update (when this occurs, the incremental update is immediately cancelled). After the BEA AL Pathways Rank Engine Service is restarted, choose this option and click **Go**. The incremental update restarts at the point at which it was cancelled.

- **Start Over and skip the data gathering phase:** Start an incremental update at the beginning of the reshaping phase. This option is only available if the Rank Engine successfully completed the data gathering phase the previous time it ran this phase.

This option can save you time when tuning rank factors. For details, see [“Recommended Process for Tuning Rank Factors” on page 4-5](#)

6. Click **Go**.

## Scheduling Incremental Updates

You can configure Pathways to perform an incremental update of the Rank Engine database on a regular schedule. To do this, you specify the next time you want to run an incremental update and how frequently you want to run incremental updates, after the first update is run.

To schedule an incremental update:

1. Click **Administration**.
2. From the Select Utility drop-down list, click **Pathways Administration**.
3. Click the Rank Factors tab, **Schedule And Status** page.
4. In the Incremental Update area, click **Run On a Schedule**.



5. Click the **Calendar** icon, then choose the date and time when you want to run the next incremental update.
6. In the **Run every X Day(s)** box, type the interval (in days) at which you want to run incremental updates, after the first update is run.

For example: the current date is November 9, 2007. You specify to start the next incremental update on November 12, 2007 at 2:00 am, and you schedule to run incremental updates every 7 days after the first update is run. The Rank Engine will run incremental updates on the following schedule:

- November 12, 2007 at 2:00 am
- November 19, 2007 at 2:00 am
- November 26, 2007 at 2:00 am, and so on.

7. Click **Go**.

## Performing Full Updates of the Rank Engine Database

This section describes how to perform a full update of the Rank Engine database.

**Note:** During a full rebuild, all of the data from the Rank Engine's database is deleted and rebuilt. This process might be very time-consuming. For this reason, you should only perform this procedure when absolutely necessary.

To perform an on-demand full update of the Rank Engine database:

1. Click **Administration**.
2. From the Select Utility drop-down list, click **Pathways Administration**.
3. Click the Rank Factors tab, **Schedule And Status** page.
4. In the Full Rebuild area, click **Go**.

## Viewing the Status of a Rank Engine Database Update

To view the status of a Rank Engine database update:

1. Click **Administration**.
2. From the Select Utility drop-down list, click **Pathways Administration**.
3. Click the Rank Factors tab, **Schedule And Status** page.

4. Look at the Status area.

The Status area displays the progress of each stage of an incremental update or full rebuild of the Rank Engine database. This progress information includes the date and time that each stage completed or failed.

## Stopping Rank Engine Database Updates

Pathways Administration lets you stop a full rebuild of the Rank Engine database when it is occurring, and stop the schedule for running incremental updates of the Rank Engine. To do either:

1. Click **Administration**.
2. From the Select Utility drop-down list, click **Pathways Administration**.
3. Click the Rank Factors tab, **Schedule And Status** page.
4. In the Status area, click **Stop**.

# Working with Pathways Security

This chapter provides information on

- [Activity Rights, Capabilities, and Roles](#)
- [Granting Access to Pathways User Interfaces](#)
- [Making the Pathways Tag Me Portlet Available to Users](#)

## Activity Rights, Capabilities, and Roles

This section discusses the activity rights, capabilities, and roles that are delivered Pathways. It includes the following sections:

- [Activity Rights](#)
- [Capabilities](#)
- [Roles](#)

## Activity Rights

Access to the Pathways application is managed through the use of portal activity rights. The following table describes the activity rights that are delivered with Pathways:

**Table 6-1 Pathways Activity Rights**

Activity Right	Description
Access Pathways	Allows users to see the Pathways application.

### Granting Activity Rights to Users

To grant an activity right to a user:

1. Log in to the portal.
2. Click the **Administration** tab.
3. From the Select Utility drop-down menu, select **Activity Manager**.
4. Click the activity right you want to edit.
5. Click **Add Groups**.
6. Select the group you want to add.
7. Click **OK**.
8. Click **Finish**.

For more information on using activity rights, see the *Administrator Guide for BEA AquaLogic Interaction*.

## Capabilities

When you create Pathways roles, you add capabilities to portal users and groups in order to grant the ability to perform different tasks in Pathways. The following table describes the capabilities

that are delivered with Pathways. For information on creating roles, see [“Creating Pathways Roles” on page 6-5](#).

**Table 6-2 Pathways Capabilities**

<b>Capability</b>	<b>Description</b>
Access Enhanced UI	Lets users view the Enhanced UI.
Add Favorites and Contacts	Lets users add items and people to their Favorites & Contacts view.
Add Tags	Lets users apply tags to items and people.
Administer Security	Lets users create Pathways roles.
Create Views	Lets users: <ul style="list-style-type: none"> <li>• Create Custom views.</li> <li>• Edit and delete views that they create.</li> </ul>
View Everyone's Tags	Lets users access the Everyone's Tags view from the View drop-down list.
View My Tags	Lets users access their My Tags view from the View drop-down list.
Prescribe Views	Lets users perform the following: <ul style="list-style-type: none"> <li>• Prescribe Custom views to other people.</li> <li>• Edit and delete Prescribed views that they create.</li> <li>• Remove views that were prescribed to them from their list of views.</li> </ul>
Save Searches	Lets users save queries.
Set User Preferences	Lets users access the Pathways Preferences page, which is used to override the preferences that the administrator sets on the Defaults page. For details on specifying the preferences that appear on the Pathways Preferences page, see <a href="#">“Specifying Default UI Preferences” on page 7-1</a> .

**Table 6-2 Pathways Capabilities**

Capability	Description
View People	<p>Lets users view people.</p> <p><b>Note:</b> If the Users result type is selected on a user's Pathways Preferences page, that user will be able to see users in their search results on the Items tab and Pathways Items portlet, regardless of whether or not that user has the View People capability.</p> <p>Pathways determines the users to display by employing the same method used for displaying all other items. User objects are not people as defined by Pathways; only people (displayed on the People tabs and Pathways People portlet) can be considered subject matter experts. For more information on how Pathways determines subject matter experts, see <a href="#">“Defining the Calculation of Subject Matter Experts”</a> on page 4-10.</p>
View Tags	Lets users view tags in tag lists/tag clouds and in search results.

## Roles

A portal user can access Pathways functionality only when assigned to a Pathways role. This section lists the roles that are delivered with Pathways and describes how to create custom Pathways roles.

### Delivered Roles

The following table describes the roles that are delivered with Pathways:

**Table 6-3 Pathways Delivered Roles**

Role	Description
Administrator	<p>Has all capabilities.</p> <p>By default, the portal's Administrators group and Administrator user are members of Pathways' Administrator role.</p>

**Table 6-3 Pathways Delivered Roles**

<b>Role</b>	<b>Description</b>
Views Administrator	Has the Create Views and Prescribe Views capabilities. By default, there are no portal groups or users that are members of the Views Administrator role.
Everyone	Has the Access Enhanced UI, Add Favorites and Contacts, Add Tags, View Everyone's Tags, View My Tags, Save Searches, Set User Preferences, View People, and View Tags capabilities. By default, the Everyone portal group is a member of the Everyone role.

## Creating Pathways Roles

To create a Pathways role:

1. Click **Administration**.
2. From the Select Utility drop-down list, click **Pathways Administration**.
3. Navigate to the **Security** page.
4. Click **Add**.
5. Click the **Role Name and Description** tab, then perform the following:
  - a. Type the role's name in the **Role Name** box.
  - b. Type the role's description in the **Description** box.
  - c. Click **OK**.
6. Click the **User & Group Assignments** tab, then perform the following:
  - a. Click **Add**  
The Select Users and Groups dialog box appears.
  - b. Choose the portal users and groups that you want to add to the role.

**Note:** If a user is a member of more than one role, Pathways checks all roles when deciding whether or not a user can see a given object, or perform a given task on that object. If a user belongs to multiple roles, they are granted the combination of capabilities that are included in those roles.

If a user is a member of a group that is added to a role, Pathways grants the user the capabilities that are associated with that role. If a user is a member of a group that is included in more than one role, Pathways checks all roles when deciding whether or not that user can see a given object, or perform a given task on that object.

- c. Click **OK**.
7. Click the Permission Assignments tab, then perform the following:
  - a. Click **Add**.  
The Select Capabilities dialog box appears.
  - b. Choose the capabilities that you want to add to the role.
  - c. Click **OK**.
8. Click **SAVE**.

## Granting Access to Pathways User Interfaces

The table below lists the Pathways user interfaces and the security that you must grant to users to provide them access to these user interfaces:

**Table 6-4 Security Required for Pathways User Interfaces**

Pathways User Interface	Security Required
Pathways Administration	<ul style="list-style-type: none"> <li>• Access Pathways activity right</li> <li>• Access Administration activity right</li> <li>• Access Utilities activity right</li> <li>• Read access to the Pathways Administration Web Service</li> </ul>
Simple UI	<ul style="list-style-type: none"> <li>• Access Pathways activity right</li> <li>• Read access to the Pathways Web Service</li> </ul>
Enhanced UI	<ul style="list-style-type: none"> <li>• Access Pathways activity right</li> <li>• Read access to the Pathways Web Service</li> <li>• Access Enhanced UI capability</li> </ul>
Pathways Items portlet	<ul style="list-style-type: none"> <li>• Access Pathways activity right</li> <li>• Read access to the Pathways Items Web Service</li> </ul>



**Table 6-4 Security Required for Pathways User Interfaces**

<b>Pathways User Interface</b>	<b>Security Required</b>
Pathways People portlet	<ul style="list-style-type: none"> <li>• Access Pathways activity right</li> <li>• Read access to the Pathways People Web Service</li> <li>• View People capability</li> </ul>
Pathways Results portlet	<ul style="list-style-type: none"> <li>• Access Pathways activity right</li> <li>• Read access to the Pathways Results Web Service</li> </ul>
Pathways Tag Cloud portlet	<ul style="list-style-type: none"> <li>• Access Pathways activity right</li> <li>• Read access to the Pathways Tag Cloud Web Service</li> <li>• View Tags capability</li> </ul>
Pathways Tag Me portlet	<ul style="list-style-type: none"> <li>• Access Pathways activity right</li> <li>• Read access to the Pathways Tag Me Web Service</li> <li>• View Tags capability</li> </ul>
Pathways Search portlet	<ul style="list-style-type: none"> <li>• Access Pathways activity right</li> <li>• Read access to the Pathways Search Web Service</li> </ul>

## Making the Pathways Tag Me Portlet Available to Users

This section discusses how to make the Pathways Tag Me portlet available to end users. The Pathways Tag Me portlet lets users view tags that have been applied to the user whose profile they are viewing. When users click a tag in the Pathways Tag Me portlet, their search results appear in the Items and People tabs of the Enhanced UI.

This procedure is optional. If you do not want any of your users to view the data in this portlet, you do not need to perform this procedure. When you perform this procedure, you make the Pathways Tag Me portlet available to all of your users who have the required security granted to access the Pathways Tag Me portlet. For details on the required security, see [“Granting Access to Pathways User Interfaces” on page 6-6](#).

Note, however, that you can make this portlet available to only some of your users by performing this procedure, then editing the Pathways Tag Me portlet’s security to specify the users and groups that can access the portlet. For details on managing portlet security, see *AquaLogic Interaction Online Help*.

To make the Pathways Tag Me portlet available to end users, you must use the User Profile Manager to add the portlet to the General Information (Home) page. After you perform this procedure, users can view their own Pathways User Profile portlet by clicking **My Account**, then clicking **View User Profile**.

To make the Pathways User Profile portlet available to users, perform the following:

1. Navigate to **Administration**.

The Admin Objects Directory appears.

2. From the Select Utility menu, select **User Profile Manager**.

The User Profile Manager appears.

3. Click **General Information (Home) page**.

The Edit Page: General Information page appears.

4. Click **Add Portlets**.

The Add Portlets: General Information page appears.

5. Select **Pathways Tag Me Portlet**.

6. Click **Finish**.

You are returned to the Edit Page: General Information page.

7. Click **Finish**.

You are returned to the User Profile Manager.

8. Click **Finish**.

You are returned to the Admin Objects Directory.

For more information on the Pathways User Profile portlet, see *AquaLogic Pathways Online Help*.

# Administering the User Interface

This chapter includes the following topics:

- [Specifying Default UI Preferences](#)
- [Configuring Pathways to Allow Content Submission From a Local File Source](#)
- [Defining Saved Search Email Notification Sending Time](#)
- [Configuring Pathways Pagelets](#)

## Specifying Default UI Preferences

This topic discusses how to choose the default selections that appear on the Pathways Preferences page.

This topic includes the following sections:

- [Specifying Default Actions to Display in Activity Streams](#)
- [Specifying the Default Folder for Knowledge Directory Uploads](#)
- [Specifying the Default Number of Popular and Related Tags to Display](#)
- [Specifying the Default Number of Search Results to Display](#)
- [Specifying Default Search Result Object Types](#)

## Specifying Default Actions to Display in Activity Streams

To specify the default actions that appear in users' activity streams:

1. Click **Administration**.
2. From the Select Utility drop-down list, click **Pathways Administration**.
3. Click the **UI Preferences** tab, **Defaults** page.
4. In the **Activity Stream** area, choose the default actions that you want to be displayed in users' Activity Streams.
5. Click **SAVE**.

If users have the Set User Preferences capability, they can access the Pathways Preferences page and override the defaults that you set. Users can also restore the defaults that you specify.

## Specifying the Default Folder for Knowledge Directory Uploads

You can specify the default Knowledge Directory folder into which you want users to submit content and upload bookmarks. Users submit content and upload bookmarks by using either the **Submit a Document** or **Import Bookmarks** tabs, which are accessible by clicking either **Submit Content** on the Search page, or **Submit** on the Pathways Browser Plug-in. Users can override the default Knowledge Directory folder that you specify.

**Note:** Users must have Admin access level privileges to the Knowledge Directory folder into which they submit content or bookmarks for their content or bookmarks to be automatically approved. Users who do not have these privileges must have their content and bookmarks approved by a portal administrator before they appear in Pathways search results. For details on approving directory content, see *AquaLogic Interaction Online Help*.

To specify the default folder for Knowledge Directory uploads:

1. Click **Administration**.
2. From the Select Utility drop-down list, click **Pathways Administration**.
3. Click the **UI Preferences** tab, **Defaults** page.
4. In Default Upload Folder area, click **Choose a Portal Folder**.

The Default Upload Folder dialog box appears.

5. Choose the Knowledge Directory folder into which you want users to submit content and upload bookmarks.
6. Click **OK**.

You are returned to the Defaults page.

7. Click **SAVE**.

If users have the Set User Preferences capability, they can access the Pathways Preferences page and override the defaults that you set. Users can also restore the defaults that you specify.

## Specifying the Default Number of Popular and Related Tags to Display

To specify the default number of popular and related tags to display in users' search results:

1. Click **Administration**.
2. From the Select Utility drop-down list, click **Pathways Administration**.
3. Click the **UI Preferences** tab, **Defaults** page.
4. In the Number of Items to Display area, choose a value from the **Tags** drop-down list.

The value that you choose specifies the default maximum number of popular and related tags that are displayed in Pathways pages, tabs, and portlets.

5. Click **SAVE**.

If users have the Set User Preferences capability, they can access the Pathways Preferences page and override the defaults that you set. Users can also restore the defaults that you specify.

## Specifying the Default Number of Search Results to Display

To specify the default number of search results to display in users' search results:

1. Click **Administration**.
2. From the Select Utility drop-down list, click **Pathways Administration**.
3. Click the **UI Preferences** tab, **Defaults** page.
4. In the Number of Items to Display area, choose a value from the **Results per Page** drop-down list.

The value that you choose specifies the default maximum number of search results that you want displayed on each page of Pathways' tabs and portlets.

5. Click **SAVE**.

If users have the Set User Preferences capability, they can access the Pathways Preferences page and override the defaults that you set. Users can also restore the defaults that you specify.

## Specifying Default Search Result Object Types

To specify the default object types that you want to be included in users' search results on the Items tab and Pathways Items portlet:

1. Click **Administration**.
2. From the Select Utility drop-down list, click **Pathways Administration**.
3. Click the **UI Preferences** tab, **Defaults** page.
4. In the **Results Types** area, select the defaults object types that you want to include in search results.

**Note:** If you select the Users result type, end users will be able to see users in their search results on the Items tab and Pathways Items portlet, regardless of whether or not those users have the View People capability.

Pathways determines the users to display by employing the same method used for displaying all other items. User objects are not people as defined by Pathways; only people (displayed on the People tabs and Pathways People portlet) can be considered subject matter experts. For more information on how Pathways determines subject matter experts, see [“Defining the Calculation of Subject Matter Experts” on page 4-10](#).

5. Click **SAVE**.

If users have the Set User Preferences capability, they can access the Pathways Preferences page and override the defaults that you set. Users can also restore the defaults that you specify.

# Configuring Pathways to Allow Content Submission From a Local File Source

By default, Pathways allows users to submit only Web pages to the Knowledge Directory. To submit a Web page, users click the Submit a Document tab, then submit the Web page using the World Wide Web option.

If you want users to be able to submit content to the Knowledge Directory from their local file system, you must configure a Content Upload content source to make the My Computer option on the Submit a Document tab available to users. This section describes how to configure Pathways to make the My Computer option available to end users.

This section contains the following task subsections, in the order in which you should perform them:

1. [Prerequisites](#)
2. [Locating the Content Upload Web Service URL and Content Source ID](#)
3. [Configuring the Content Upload Content Source](#)

## Prerequisites

You must complete the following steps before configuring Pathways to allow local file source content submission:

- Verify that the Content Upload Service is installed with your AquaLogic Interaction installation.
- Verify that the **contentupload.ptc** server package file has been imported into your portal.

For more information, see the *Installation Guide for AquaLogic Interaction*.

## Locating the Content Upload Web Service URL and Content Source ID

To locate the Content Upload Web Service URL and Content Source ID:

1. Log into the portal.
2. Click **Administration**.
3. Open the **Portal Resources** folder.

4. Expand the **Web Service** category and click **Content Upload Web Service** to open the Content Web Service editor.
5. On the Main Settings page, under **Content Web Service Settings**, view and note the **Upload URL**.

It should look something like this:

`http://server name:11910/ptupload/upload.`

You will use this Portal Upload URL when performing the procedure [Configuring the Content Upload Content Source](#).

6. Click **Cancel** to exit the Content Web Service editor and return to the Administration directory.
7. In the **Portal Resources** folder, expand the **Content Source** category.
8. Click **Content Upload** to open the Remote Content Source editor.
9. On the Properties and Names page of the Remote Content Source editor, view and note the **Object ID** value.

You will use this Content Source ID value when performing the procedure [Configuring the Content Upload Content Source](#).

## Configuring the Content Upload Content Source

To configure Content Upload content source for Pathways:

1. Log into AquaLogic Configuration Manager.
2. In the Pathways section, select **Content Sources**.
3. Select **Enable Portal Upload** to make the Content Upload settings appear.
4. In the **Portal Upload Content Source ID** field, enter the Content Source ID that you noted in [Locating the Content Upload Web Service URL and Content Source ID](#).
5. In the **Portal Upload Service URL** field, enter the Upload URL that you noted in [Locating the Content Upload Web Service URL and Content Source ID](#).
6. Click **Save** to store the settings.
7. Restart Pathways.



## Defining Saved Search Email Notification Sending Time

Users can choose to receive an email notification with the results of a saved search. Users specify how frequently they receive email notifications on the Pathways Preferences page. This section describes how to define the time that Pathways sends saved search email notifications each day.

To define the time when Pathways sends saved search email notifications:

1. Click **Administration**.
2. From the Select Utility drop-down list, click **Pathways Administration**.
3. Click the **General** tab.
4. In the **Notification** drop-down box, choose the time that you want saved search email notifications to be sent each day.
5. Click **SAVE**.

## Configuring Pathways Pagelets

You can edit the variables in the `pagelet_config.js` file to configure the behavior of and add specific query restrictions to the following Pathways pagelets and portlets:

- Pathways Search
- Pathways Results
- Pathways Tag Cloud
- Pathways Tag Me

Pathways pagelets are surfaced in non-portal applications; Pathways portlets are surfaced in the portal.

The `pagelet_config.js` file is located in:

- Windows: `install_dir\pathways\ptimages\imageserver\js\pagelets\`
- UNIX/Linux: `install_dir/pathways/ptimages/imageserver/js/pagelets/`

The following table describes the variables that you can edit:

**Table 7-1 Variables in pagelet\_config.js file**

Variable Group	Variable	Description
General Settings	PWY_REST_URL	The URL to the Pathways API.
	PWY_TAG_MAXLENGTH	The maximum number of characters allowed for tags that are created on the Pathways Results pagelet and Pathways Tag Me pagelet.
Pathways Search Pagelet	PWY_SEARCH_REDIRECT_URL	The URL to the page where the Pathways Search pagelet exists. Users are sent to this URL after clicking the <b>Search</b> button.  <b>Note:</b> This variable is only used for integrating with AquaLogic Ensemble 2.0, which is not yet available.
Pathways Results Pagelet	PWY_RESULTS_QUERY_RESTRICTIONS	Defines the display of search results in the Pathways Results pagelet. For details on the parameters used with this variable, see “About the Pathways API” at <a href="http://e-docs.bea.com/en/alui/devdoc/docs6x/aluidevguide/con_pathwaysapi.html">e-docs.bea.com/en/alui/devdoc/docs6x/aluidevguide/con_pathwaysapi.html</a> .
	PWY_RESULTS_PAGINATION_SIZE	The maximum number of pages that users can paginate through on the Pathways Results pagelet.
	PWY_RESULTS_PAGE_SIZE	The maximum number of items displayed per page in the Pathways Results pagelet.
	PWY_RESULTS_MAX_TAGS	The maximum number of tags displayed for each item on the Pathways Results pagelet.
	PWY_MAX_TITLE_LENGTH	The maximum number of characters allowed in search result names in the Pathways Results pagelet.
Pathways Tag Cloud Pagelet	PWY_TC_QUERY_RESTRICTIONS	Defines the display of tags in the Pathways Tag Cloud pagelet. For details on the parameters used with this variable, see “About the Pathways API” at <a href="http://e-docs.bea.com/en/alui/devdoc/docs6x/aluidevguide/con_pathwaysapi.html">e-docs.bea.com/en/alui/devdoc/docs6x/aluidevguide/con_pathwaysapi.html</a> .

**Table 7-1 Variables in pagelet\_config.js file**

Variable Group	Variable	Description
Pathways Tag Me Pagelet	PWY_TM_REDIRECT_URL	The URL to the page on which the Pathways Results pagelet exists. After clicking a tag in the Pathways Tag Me pagelet, users are sent to this URL.  <b>Note:</b> This variable is only used for integrating with AquaLogic Ensemble 2.0, which is not yet available.
	PWY_TM_ITEM_RESTRICTIONS	Defines the display of search results in the Pathways Tag Me pagelet. Configure this parameter to return exactly one item at one time.

Do not change values for the following variables in the **pagelet\_config.js** file:

- USER\_PROFILE\_COMMUNITYID
- PWY\_NAMESPACE
- jsonResultListPrefix
- jsonTagListPrefix
- jsonViewsListPrefix
- jsonIsItemFavoritePrefix
- jsonAccessDenied
- jsonRestExceptionPrefix
- jsonNoResultPrefix

## Administering the User Interface

# Troubleshooting

This appendix provides information on troubleshooting the Pathways in runtime. It includes the following topics:

- [Overview of Logs](#)
- [Troubleshooting Common Runtime Problems](#)
- [When to Use the Logging Utilities](#)

## Overview of Logs

This section provides the descriptions and locations of logs that you can use to troubleshoot the Pathways installation and Pathways in runtime. Individual log files are generated for each day's activity.

## Runtime Logs

**Table A-1** Logs Used to Troubleshoot Pathways in Runtime

Log	Description	Default Location and Platform
wrapper.log	<p>Provides additional activity and error details for the BEA AL Pathways service, including details for these user interfaces:</p> <ul style="list-style-type: none"> <li>• Simple UI</li> <li>• Enhanced UI</li> <li>• Pathways Administration</li> </ul> <p><b>Note:</b> Wrapper.log is most useful for troubleshooting startup problems. Otherwise, we recommend that you use Logging Spy instead of wrapper.log to troubleshoot Pathways. Logging Spy is an ALI logging utility. For details, see the Logging Utilities documentation at <a href="http://edocs.bea.com/ali/devtools">edocs.bea.com/ali/devtools</a>.</p>	<ul style="list-style-type: none"> <li>• <i>install_dir</i>\pathways\1.5\logs (Windows)</li> <li>• <i>install_dir</i>/pathways/1.5/logs (UNIX)</li> </ul>

Individual log files are generated for each day's activity.

## Troubleshooting Common Runtime Problems

The table in this section describes common runtime problems and provides solutions to them.

---

**Tip:** To find the version number of your Pathways application, use the following URL: [http://pathways\\_server\\_name:port\\_number/graffiti/ajax/version.do](http://pathways_server_name:port_number/graffiti/ajax/version.do). For details on using the Pathways API to find the version number of your Pathways application, see [e-docs.bea.com/en/alui/devdoc/docs6x/aluidevguide/con\\_pathwaysapi.html](http://e-docs.bea.com/en/alui/devdoc/docs6x/aluidevguide/con_pathwaysapi.html).

---

**Table A-2 Common Runtime Problems and Solutions**

Problem Description and Details	Cause and Solution
<ul style="list-style-type: none"> <li>Problem: Users cannot submit content to the Knowledge Directory from their computers.</li> <li>Details: Users can submit content from the Web, but not from their computers because the My Computer option is not visible.</li> </ul>	<ul style="list-style-type: none"> <li>Cause: You did not correctly configure Pathways to allow content submission from a local file source.</li> <li>Solution: Correctly configure Pathways to allow content submission from a local file source. For details, see “<a href="#">Configuring Pathways to Allow Content Submission From a Local File Source</a>” on <a href="#">page 2-5</a>.</li> </ul>
<ul style="list-style-type: none"> <li>Problem: Unable to access Configuration Manager.</li> </ul>	<ul style="list-style-type: none"> <li><b>Cause 1:</b> The Windows service for Configuration Manager is not running.</li> <li><b>Solution 1:</b> Ensure that the BEA AL Configuration Manager(<i>port_number</i>) service is running.</li> <li><b>Cause 2:</b> You are not accessing Configuration Manager by using the correct URL.</li> <li><b>Solution 2:</b> Access Configuration Manager by using the following URL: <a href="https://localhost:port_number">https://localhost:port_number</a>. Replace <i>port_number</i> with the port number used by Configuration Manager. By default, Configuration Manager uses port number 12345. If the person who installed Pathways specified a port number other than 12345 on the Configuration Manager - Port and Password installation wizard page, use the port number that the person specified.</li> </ul>

## When to Use the Logging Utilities

When the Pathways portlets or the Pathways Administration UI display either an error or the Pathways diagnostic checks, the Pathways application or one or more of its required services may not be configured correctly. Use ALI Logging Utilities to help identify the specific issue by enabling Pathways and the required services as message senders within Logging Spy.

For more information about the Logging Utilities, see the Logging Utilities documentation at [edocs.bea.com/alui/devtools](https://edocs.bea.com/alui/devtools).



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