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Web Parts User Guide

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Preface

Web Parts product technology enables users to interact with a Content Server using Microsoft's SharePoint technology by using web parts functionality, such as that provided by basic portlets.

Audience

This guide is intended for end users who will be accessing Web Parts product functionality as well as for system administrators who need to install and configure the system. If usage or tasks are limited to administrators, it is noted in text or in headings with **(Admin Only)**.

This guide assumes that the product has been installed correctly and that those administrators who are configuring the product are familiar with the architecture of Content Server.

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For more information, see the applicable documents in the Oracle Universal Content Management Release 10g documentation set:

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
<code>monospace</code>	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

Introduction to Web Parts

This chapter provides an overview of this document and contains the following topics:

- ["About This Guide"](#) on page 1-1
- ["Web Parts Product Overview"](#) on page 1-1

1.1 About This Guide

This document contains the following chapters:

- [Chapter 2, "Installation and Configuration"](#), which provides details concerning the installation of the Web Parts product.
- [Chapter 3, "Using Web Parts"](#), which explains how to use the Web Parts product functionality.
- [Chapter 4, "Customizing the Software"](#), which describes how to customize the Web Parts product technology.
- [Chapter 5, "Administering the Software"](#), which describes how to administer the Web Parts product technology.
- [Appendix A, "Modifying Configuration Settings"](#), which describes a configuration editor used to modify configuration settings. It also describes files that can be used for further customizations.
- [Appendix B, "Security Considerations"](#), which descriptions of file access permissions and user identity roles specific to the operation of Oracle Content Server Web Parts.

In addition, an Index is provided at the end of this document.

1.2 Web Parts Product Overview

Web parts is a term used to describe functionality such as that provided by basic portlets, similar to the Content Portlet Suite currently available. Web Parts product technology enables users to interact with a Content Server using Microsoft's SharePoint technology by using these web parts.

The major components involved in a typical installation include:

- **UCM:** Universal Content Manager, which allows organizations to manage their documents in a central repository known as a UCM Server.
- **Content Server:** A storage repository for content from various sources. It provides a solution for archiving and managing email, files, and other data types.

- **SharePoint Repository:** A storage repository for content using SharePoint technology and interface functions.
- **Web Parts product:** A way to communicate between UCM and the Enterprise Vault as well as the SharePoint Repository. The Web Parts product enables corporations to control content in the Enterprise Vault and the SharePoint Repository.

Two primary use cases exist for the combination of the Web Parts product and SharePoint:

- Using SharePoint to collaborate on documents then 'promoting' them to a Content Server for storage or use on the enterprise system. This allows users to manage content in SharePoint, including in workflows, collaboration projects, and so forth, but use Content Server for storage and retention.
- Using a SharePoint front end but storing the content behind SharePoint in a Universal Content Management (UCM) system. This allows users who are familiar with SharePoint to use that interface for many tasks.

The web parts also provide for the use of both a SharePoint content repository and a Content Server repository. Content items can be moved between the two systems. This allows consumers who are familiar with SharePoint to interact with the Content Server through a known interface, thus making it easier to contribute and search for content.

After installation, the Web Parts product provides a navigation tree on the SharePoint system with functionality available through web parts. The following is a brief description of this functionality. See [Chapter 3, "Using Web Parts"](#) for details on using each of these options.

- **My Saved Queries:** Displays a user's saved queries and subnodes, allowing the user to open a Content Server search form.
- **My Saved URLs:** Provides access to the user's saved URLs. After clicking the URL title, a new browser window opens with the URL target displayed.
- **My Workflow Assignments:** Provides information about the user's current workflow assignments.
- **My Checked-Out Content:** Provides access to the user's currently checked out content. This is only available if the user is logged in with the contributor, admin, or sysmanager role.
- **My Subscriptions:** Provides access to the user's Content Server subscriptions.
- **Contribution Folders** (available if the Folders component is enabled): Provides access to folders and subfolders.
- **Trash** (available if the Folders component is enabled): Provides access to the Trash folder.

The following menu items are also available to those users logged in as an Administrator:

- **Administration:** Provides access to Web Support Server (WSS) settings.
- **Content Server Users:** Allows access to a listing of all content server users.
- **External Mapped User:** Allows access to a list of all externally mapped users.
- **Search Form Definitions:** Allows administrators to design custom search forms for queries.

Many of these menu options have additional options available. For example, if a user clicks an item's icon a menu is displayed with actions available for that option. See [Chapter 3, "Using Web Parts"](#) for details about the functionality of each option.

Installation and Configuration

This section discusses how to install the Web Parts product. It covers the following topics:

Concepts

- ["Installation Overview"](#) on page 2-2

Tasks

- ["Using the Installer"](#) on page 2-2
- ["Installing Additional Components"](#) on page 2-4
- ["Adding Custom Fields to the Content Server"](#) on page 2-6
- ["Adding Content Server to Your SharePoint System"](#) on page 2-7
- ["Uninstalling the Software"](#) on page 2-20

Interface

- ["Select Installation Address Screen"](#) on page 2-9
- ["Specify Share Location Screen"](#) on page 2-11
- ["Automated Web Site Emails Screen"](#) on page 2-12
- ["Logging Options Screen"](#) on page 2-13
- ["Select Sign On Support Screen"](#) on page 2-14
- ["Select Installation Folder Screen"](#) on page 2-15
- ["Specify Oracle UCM Server URL Screen"](#) on page 2-16
- ["Administrator Name Screen"](#) on page 2-17
- ["SharePoint Main Screen"](#) on page 2-17
- ["SharePoint Site Listing Screen"](#) on page 2-18
- ["SharePoint Site Content Screen"](#) on page 2-18
- ["SharePoint Create Page Screen"](#) on page 2-19
- ["New Content Server Web Parts Page"](#) on page 2-19
- ["New Page Screen"](#) on page 2-20

2.1 Installation Overview

The Web Parts product is installed using an Installer program on the SharePoint server. You should choose the correct version of the installer for your Windows operating system. For x86 based operating systems, choose the folder WebPartsInstall. **If you are installing on a Windows 64bit based operating system, choose the folder "WebPartsInstall (64bit)".** This process installs the following components:

- The Web Support Server (WSS) which is the link between the Content Server and the Web Parts product. WSS is installed as a Windows service on the SharePoint server and it must be running in order for the Web Parts product to function.
- The Support Web Application which provides AJAX handlers for the Web Parts product. These AJAX handlers are SharePoint server side objects that handle asynchronous requests from the browser. This allows client code to communicate through WSS to the Content Server.
- The Content Server and Web Parts product integration points. These are described in SharePoint configuration files, overlaid on the SharePoint directory structure.

After running the Installer, you must also install and enable components on the Content Server in order to complete the installation and configure the system for use. See "[Installing Additional Components](#)" on page 2-4 for details.

After installing the Windows components steps must be taken to configure file level security access for Windows 2008 Server. This and other security related topics are covered in Appendix C: Security Considerations.

For complete details about supported software see your Content Server and SharePoint documentation.

The Web Parts product can only be used with SharePoint Server 2007. You must install Content Server version 10gR3 or newer..

For detailed information about supported operating systems, as well as special considerations for specific operating systems, see the Content Server installation guides.

2.2 Using the Installer

The installation process has several parts: installing the WebApp, installing the Content Server WSS, and installing the Web Parts product. One command initiates the entire sequence of installations.

Follow these steps to perform the Web Apps setup. Click **Cancel** at any time to stop the installation process:

1. Click on the Setup file in the root directory. A message is displayed indicating that files are being installed, then the welcome screen for the install wizard for Web Parts Installer 2007 is displayed. Click **Next** to continue.
2. On the License Agreement screen, use the default selection to accept the terms in the license agreement, and click **Next** to continue.
3. On the Customer Information screen, enter a user name and an organization name. Then specify whether to install the application for all users (the default) or only for yourself. Click **Next** to continue.
4. On the Setup Type screen, select a setup type. The default selection is `Complete`, which will install all program features. Click **Next** to continue.

5. The Ready to Install the Program screen indicates that the wizard is ready to begin the installation. Click **Install** to start the installation.
6. On the Welcome to the IPMExpress Setup Wizard screen, click **Next** to continue.
7. On the [Select Installation Address Screen](#), enter the web location (site) and the virtual directory. Click **Disk Cost** to view an estimate of the amount of space needed for the installation. The Web Parts product must be installed in the same location as the SharePoint Server. By default the screen is set to `Default Web Site`, but it should be set to the SharePoint Server site (for example, `SharePoint - 80`). Click **Next** to continue.
8. On the [Specify IIS Application Pool Screen](#), enter the application pool under which the WebApp will reside. The `App Pool` must be the same as SharePoint; by default this is `SharePoint - 80`.
9. On the [Specify Share Location Screen](#), enter the pathname to the directory that will be shared over the network. This is a temporary directory that will be shared between the web site and the Web Support Server and on the web for dynamic file output. If the directory does not exist, you can type the name of a new directory and it will be created. Click **Next** to continue.
10. On the [Automated Web Site Emails Screen](#) enter the email contact information for the person who will receive diagnostic messages. If left blank, no email is sent. Click **Next** to continue.
11. On the [Logging Options Screen](#) choose the type of logging that will be done. Logging configuration can be changed later by selecting an option from the Log menu. See "[Troubleshooting](#)" on page 5-3 for details. The default is **Logging Enable**. If you select **Timings Logging Enabled**, timing data will be kept on a per-request basis. This can create larger log files and slow the system. It should be used for diagnostic purposes only. Click **Next** to continue.
12. On the [Select Sign On Support Screen](#) choose the type of sign-on support to be used. If **Use Single Sign On** is selected, the information about the current user is used. If not selected, a user name and password form must be filled in for each login. Click **Next** to continue.
13. The Confirm Installation screen indicates that the installer is ready to install IPMExpress on your computer. Click **Next** to begin the `SCSWebSupportServerSetup` (Content Server WSS) installation.
14. On the [Select Installation Folder Screen](#) enter the location of the directory where the Content Server WSS will be installed. Click **Disk Cost** to view an estimate of the amount of space needed for the installation. Click **Everyone** if the Content Server WSS should be installed for anyone who uses the computer. Click **Just me** to install for yourself. Click **Next** to continue.
15. On the [Specify Oracle UCM Server URL Screen](#), enter the URL to the Content Server instance to be used as a data source for the server. Make sure to include the URL information up to and including the `/idcp1g` designation. Enter the SCS port number and the SCS socket number. Click **Next** to continue.

Important: By default, the Content Server port used to communicate through the socket layer is set to 4444. To change this value, you must change the configuration file for the WSS after this installation is completed. See "[App Settings](#)" on page A-8 for details about this file and the settings in it.

16. On the [Administrator Name Screen](#), enter the user names on the SharePoint and Content Server for the administrator, and enter the Content Server administrator user password. Click **Next** to continue.
17. An information confirmation screen is displayed, indicating the beginning of the Web Parts product portion of the installation. Click **Next** to continue.
18. A progress screen is displayed, showing the progress of the installation. When it completes, the software is installed and ready to use. A message is displayed regarding installation of SharePoint services. Click **Finish** to exit the installation wizard.
19. When the installation finishes, you can set up the Web Parts product configuration. See "[Post-Installation Configuration](#)" on page 2-6 for details.

2.3 Installing Additional Components

The Web Parts product requires the installation of several components on the Content Server. These components support the service calls made by the WSS and are stored in the WSS installation directory, typically named `C:\Program Files\Stellent\WSS:`

- `WebPartsWsdls.zip` (required): This contains WSDL (Web Service Definition Language) files that provide additional web services.
- `IntegrationSupportServices.zip` (required): This creates services that allow the Web Parts product to obtain user interface phrases from the Content Server for the user interface.
- `UserProxy.zip` (required): This allows an administrative user to proxy as a user from the Web Parts product. This allows some of the web services to be used in a single sign-in fashion.
- `Folders` (optional): In order to provide folders in the Web Parts product, you must install the Folders component on the Content Server.
- `OutputFormatter.zip` (required): This allows the Web Parts product to parse, print, and generate responses for various format types.

These components can be installed on the Content Server using the Component Manager or the Component Wizard. See "[Installing with Component Manager](#)" on page 2-4 and "[Installing With Component Wizard](#)" on page 2-5 for details.

2.3.1 Installing with Component Manager

To install the necessary components using Component Manager, complete the following steps:

1. Open a new browser window and log into Content Server as a system administrator.
2. Go to the Administration Applets page and click the **Admin Server** link.
3. On the Content Admin Server page click the button of the content server instance where you want to install the components.

The status page for the content server instance is displayed.

4. In the option list for the server instance, click the **Component Manager** link.
The Component Manager page is displayed.
5. Click the **Browse** button next to the **Install New Component** field.

6. Navigate to the appropriate component zip file, select it, and close the file selection dialog.
7. Click **Install**.
An overview page is displayed providing a list of the items that will be installed.
8. Click **Continue**. The required files will be installed. This might take a few minutes.
9. After all files have been copied, a message is displayed stating that the components were uploaded and installed successfully.
10. Continue installing other components by repeating steps 5 through 7. When you are done, click the link to enable the component and restart the server.
The content server status page is displayed.
11. Click the restart icon to restart the content server instance.
12. Rebuild the search index (if required).

Note: You can install and enable all components before restarting the Content Server. You do not need to restart the server after each installation.

2.3.2 Installing With Component Wizard

To install the components using Component Wizard, complete the following steps:

1. Start Component Wizard:
In Windows, choose **Start, Programs, Content Server, <instance>, Utilities, and Component Wizard**.
In UNIX, navigate to the `<install_dir>/bin` directory. At the command prompt, type **ComponentWizard**.
The Component Wizard main screen and the Component List screen are displayed.
2. Click **Install**. The Install dialog is displayed.
3. Click Select and navigate to the component zip file.
4. Double-click the zip file or click **Open**. The Install list displays the files that will be installed.
5. Click **OK**. All required files are now installed. This might take a few minutes.
6. After all files have been copied, you are prompted to confirm enabling the listed components. Click **Yes**.
7. Repeat steps 3 through 5 for additional components.
8. Close Component Wizard.
9. Restart the content server.
10. Rebuild the search index (if required).

2.3.3 Restarting the Content Server

Whenever you install and enable a new component, you need to restart the content server. If you prefer or require any down time, you might also choose to stop and then start Content Server with two separate commands.

You can restart the content server by reinitiating the services (Windows) or by reinitiating the processes (UNIX). You can also restart the content server by using the Admin Server. You need to have the 'sysmanager' role to access a content server through Admin Server.

To restart a content server using Admin Server, complete the following steps:

1. Log into Content Server as a system administrator.
2. Go to the Administration Applets page and click the **Admin Server** link.
3. On the Content Admin Server page, click the button of the content server instance that you want to restart.

The status page for the content server instance is displayed.

4. In the option list for the server instance, click the **Start/Stop Content Server** link.
5. Restart the content server by clicking the restart icon.

For more information about restarting content servers, see the administration guides provided with Content Server.

2.4 Post-Installation Configuration

After installing the Web Parts product software and component software on the Content Server, you must perform additional configuration tasks:

- Verify and add security rights to newly installed WebApp and WSS folders. For detailed instructions, see [Appendix B, "Security Considerations"](#).
- [Adding Custom Fields to the Content Server](#)
- [Adding the SharePoint IP Address](#)
- [Adding Content Server to Your SharePoint System](#)

In addition, you may want to customize the product for use at your site. See ["Customization Tasks"](#) on page 4-2 and [Appendix A, "Modifying Configuration Settings"](#) for details.

2.4.1 Adding Custom Fields to the Content Server

After installation, a custom field must be added to the Content Server to support SharePoint customizations. You must first change the length of the field type to be used for the custom field.

On the Content Server to be used with SharePoint, add the following to the <install_dir>/config/config.cfg file:

```
MemoFieldSize=2083
```

Restart the Content Server.

After the length of the field type is configured, follow these steps to add the custom field:

1. Log in as an administrator or subadministrator to your Content Server system.
2. Click **Administration** in the portal navigation bar.
3. Click **Admin Applets**.
4. Click the **Configuration Manager** icon.
5. Click **Add** on the Information Fields tab of the Configuration Manager.

The Add Metadata Field Name Screen is displayed.

6. Enter **SharePointUrl** as the new field name. Select Memo as the field type.
7. Click **OK**.

The Add/Edit Metadata Field Screen is displayed.

8. Uncheck the **Enable on User Interface** checkbox.
9. Click **OK**.
10. On the Configuration Manager screen, click **Update Database Design** (on the right side of the screen).

A new field has now been added to be used with SharePoint.

2.4.2 Adding the SharePoint IP Address

After installation, the IP address of the SharePoint server must be added to the Content Server's list of trusted IP addresses. You do not have to log in to the Content Server as an administrator to perform these actions.

Follow these steps to add the IP address:

1. Obtain the IP address of the SharePoint server where the web parts have been installed.
2. On the Content Server, from the **Start** menu, select **Programs, Content Server, instance, Utilities**, and then **System Properties**.

3. Click the Server tab.

The Server Configuration screen is displayed.

4. Add the IP address of the SharePoint server to the list of IP addresses in the IP Address Filter line.
5. Click **OK** when done.
6. Restart the Content Server.

The SharePoint server and the Content Server now have a trusted relationship established which allows WSS to access services.

2.4.3 Adding Content Server to Your SharePoint System

After configuring the Content Server, you need to make it available on your SharePoint system.

Follow this procedure to enable access to the Content Server.

1. On the [SharePoint Main Screen](#), click **Sites**.

The [SharePoint Site Listing Screen](#) is displayed.

2. Click the name of the site where the Content Server should be added.

The [SharePoint Site Content Screen](#) is displayed.

3. Click **Create** at the top of the page to create a new page in the site.

The [SharePoint Create Page Screen](#) is displayed.

4. Select **Content Server Web Parts** page.

The [New Content Server Web Parts Page](#) is displayed.

5. Enter the name to be displayed throughout the site. Consult your SharePoint documentation for details about naming conventions.
6. Select the type of layout to be used for the site. Click any template name to see a sample of the layout. Additional web parts can be added to each zone. If a web part is not added to a zone, the zone (unless it has a fixed width) and the other zones expand to fill unused space when you browse the page.
7. Choose a location where the Web Part Page will be saved. Any document libraries that were previously created are displayed in the list.
8. Click **Create** when done.

The [New Page Screen](#) is displayed with the layout options you selected. You can further customize this page by adding, removing, or moving parts to different areas of the page. See [Chapter 4, "Customizing the Software"](#) for details.

Important: If an error occurs during the placement of a web object on your newly created page, your SharePoint system is not compatible for use with Web Parts product. In this case, the Microsoft STS.msp SharePoint patch must be installed. Microsoft's STS.msp SharePoint patch is distributed with the Web Parts product, but is not installed by default. For more information, see ["Installing Microsoft SharePoint Patch"](#) on page 2-8.

2.4.4 Installing Microsoft SharePoint Patch

For the Web Parts product to work properly, it must be compatible with your SharePoint system. If an error occurred during the placement of a web object on a newly created page as instructed in [Adding Content Server to Your SharePoint System](#), then the SharePoint STS.msp patch must be installed on your SharePoint system to ensure compatibility. The STS.msp patch is placed in the Web Support Server's directory (WSS) at the time of the Web Parts product installation. By default, the Web Support Server's directory is located at C:\Program Files\Stellent\WSS.

For more information, see article ID number <http://support.microsoft.com/kb/915746> on the Microsoft support site (<http://support.microsoft.com/kb/915746>).

To install the patch, do these steps:

1. From the **Start** menu, select **Run**. The Run dialog box is displayed.
2. Enter `msiexec /p "<path to STS.msp file>"`. For example, if the STS.msp file is installed in the default location, you would enter the following:

```
msiexec /p "C:\Program Files\Stellent\WSS"
```

3. Click **OK**. The STS.msp patch is successfully installed.

2.5 Installation Interface Screens

The following screens are used to configure the Web Parts product on your SharePoint system:

- [Select Installation Address Screen](#)
- [Specify Share Location Screen](#)

- Automated Web Site Emails Screen
- Logging Options Screen
- Select Sign On Support Screen
- Select Installation Folder Screen
- Specify Oracle UCM Server URL Screen
- Administrator Name Screen
- SharePoint Main Screen
- SharePoint Site Listing Screen
- SharePoint Site Content Screen
- SharePoint Create Page Screen
- New Content Server Web Parts Page
- New Page Screen

2.5.1 Select Installation Address Screen

This screen is used to specify the web location for the software. See "[Using the Installer](#)" on page 2-2 for details.

The installer will install IPMExpress to the following web location.
To install to this web location, click "Next". To install to a different web location, enter it below.

Site:
SharePoint - 80

Disk Cost...

Virtual directory:
IPMExpress

Cancel < Back Next >

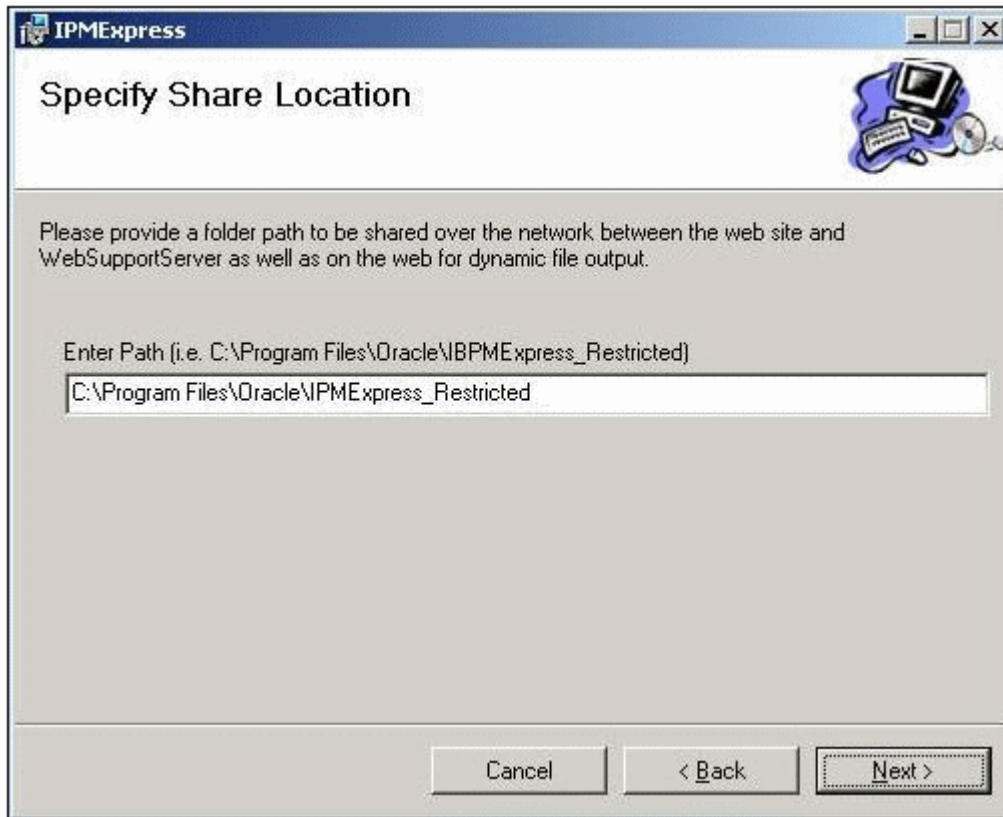
2.5.2 Specify IIS Application Pool Screen

This screen is used to specify the application pool under which the WebApp will reside. See "[Using the Installer](#)" on page 2-2 for details.



2.5.3 Specify Share Location Screen

This screen is used to provide a path to a directory that will be shared over the network. See "[Using the Installer](#)" on page 2-2 for details.



2.5.4 Automated Web Site Emails Screen

This screen is used to specify who will receive diagnostic emails. See ["Using the Installer"](#) on page 2-2 for details.

WebApp

Automated Web Site Emails

The web site sends automated messages for diagnosing issues on the system. Please enter the email contact info for the recipient(s) of this information. Note that all email addresses can be email@address.com or \"Display Name\" <email@address.com>.

Email "From" Name (who the automated emails are addressed "from"):

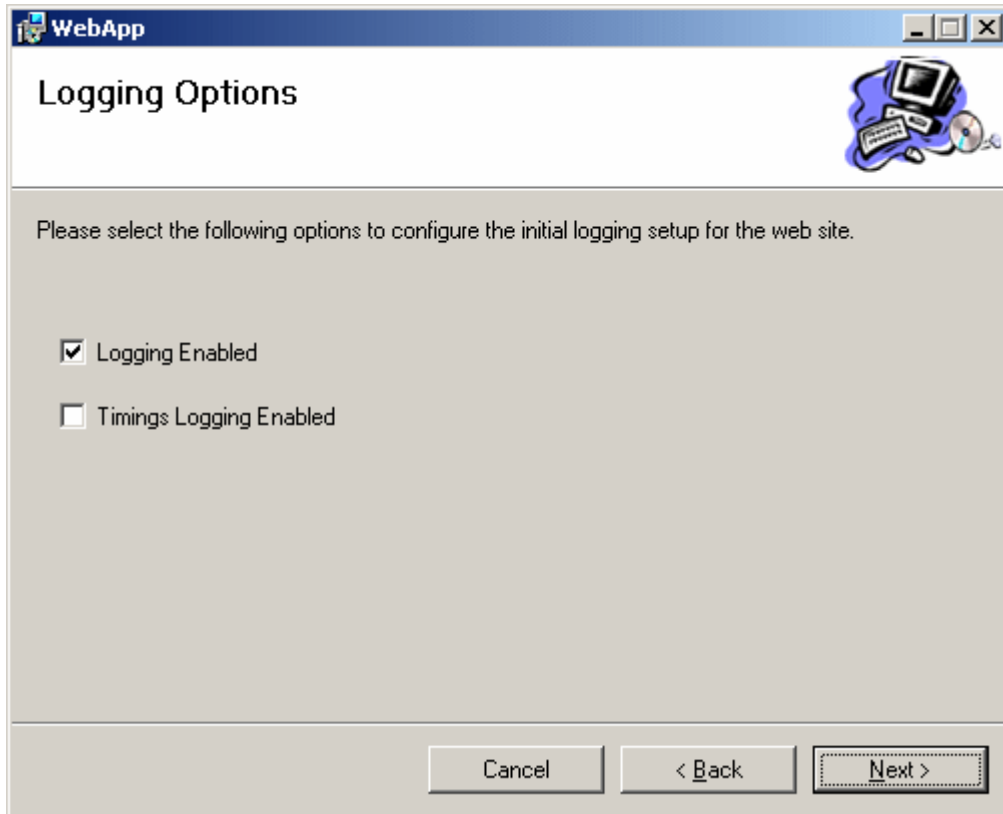
Email Server (the server to use to send the email):

Email Recipients (one or more people to receive the message, comma separated):

Cancel < Back Next >

2.5.5 Logging Options Screen

This screen is used to specify the type of logging that will be initially used. See ["Using the Installer"](#) on page 2-2 for details.



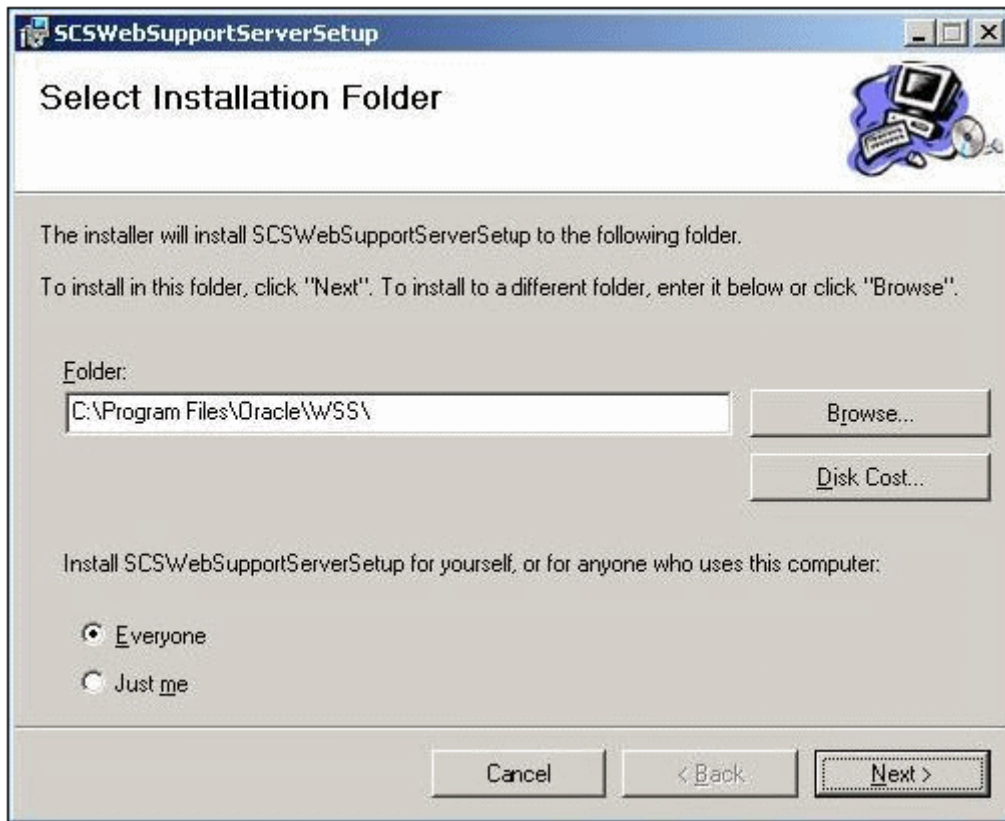
2.5.6 Select Sign On Support Screen

This screen is used to specify the type of sign on that is used. See ["Using the Installer"](#) on page 2-2 for details.



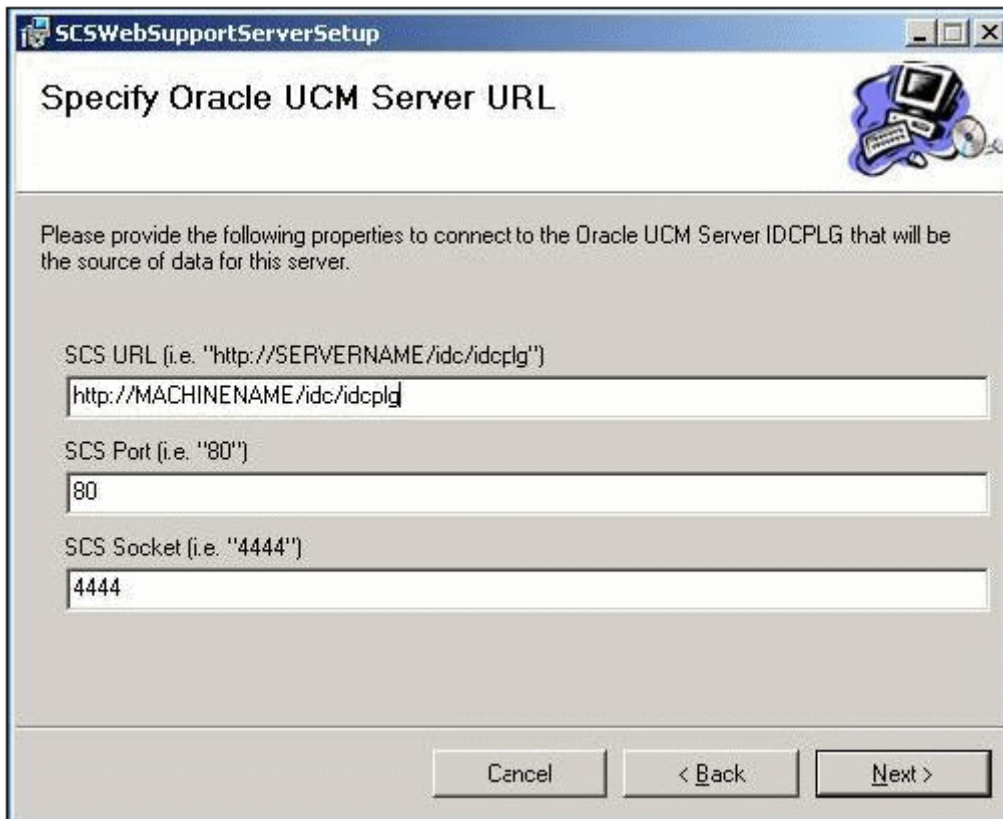
2.5.7 Select Installation Folder Screen

This screen is used to specify the location of software installation. See ["Using the Installer"](#) on page 2-2 for details.



2.5.8 Specify Oracle UCM Server URL Screen

This screen is used to specify the URL of the Oracle Content Server used. See ["Using the Installer"](#) on page 2-2 for details.



The screenshot shows a Windows-style dialog box titled "SCSWebSupportServerSetup". The main heading is "Specify Oracle UCM Server URL". Below the heading is an icon of a computer with a CD-ROM. The text reads: "Please provide the following properties to connect to the Oracle UCM Server IDCPLG that will be the source of data for this server." There are three input fields: "SCS URL (i.e. 'http://SERVERNAME/idc/idcplg')" with the value "http://MACHINENAME/idc/idcplg", "SCS Port (i.e. '80')" with the value "80", and "SCS Socket (i.e. '4444')" with the value "4444". At the bottom are three buttons: "Cancel", "< Back", and "Next >".

2.5.9 Administrator Name Screen

This screen is used to specify the user name of the SharePoint administrator and the Content Server administrator. See ["Using the Installer"](#) on page 2-2 for details.

Administrator User Name Association

You must provide a username for the SharePoint server administrator and a username for the Content Server administrator. These usernames will be linked by the web parts infrastructure so the SharePoint administrator will be logged in as the Content Server administrator.

SharePoint Administrator User Name (i.e. Doman\Username):

Content Server Administrator User Name (i.e. sysadmin):

Content Server Administrator User Password:

Cancel < Back Next >

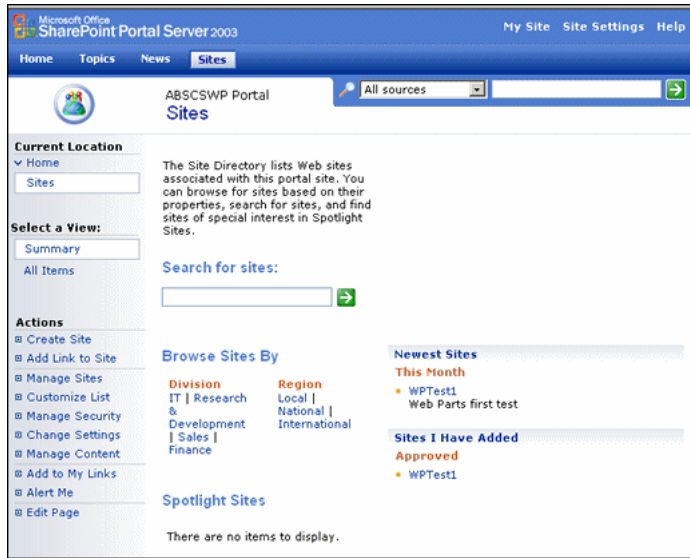
2.5.10 SharePoint Main Screen



The SharePoint Main Screen is the starting page for your SharePoint portal. To access this page, go to your SharePoint home page. To begin creating a page, click **Sites** at the top of the screen.

See your SharePoint documentation for complete details about accessing this screen and using other options on this screen.

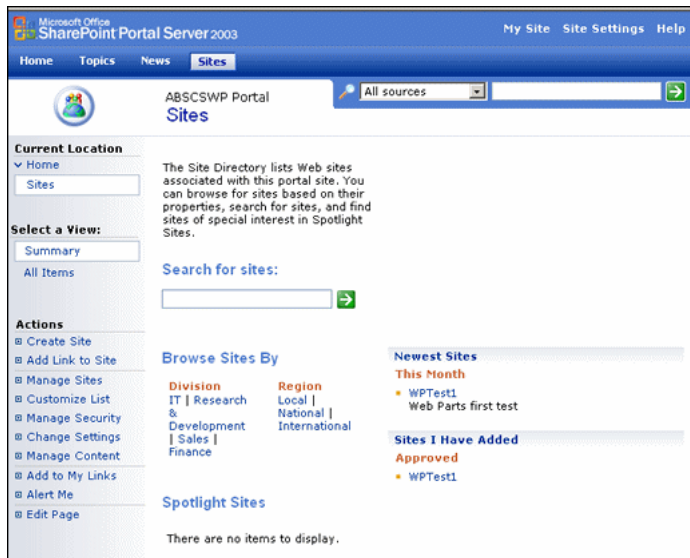
2.5.11 SharePoint Site Listing Screen



The Site Listing Screen displays all web sites available through the SharePoint portal. Use this page to add your Content Server to an existing site. To access this page, click **Sites** on the [SharePoint Main Screen](#).

See your SharePoint documentation for complete details about using other options on this screen.

2.5.12 SharePoint Site Content Screen



The Site Content Screen displays the content that is resident on the site to be used for the Content Server. Use this page to create a new page for your Content Server. You can add a variety of pages for the Content Server, as shown in the illustration. To access this page, click the name of the web site where the Web Parts product page will be installed on the [SharePoint Site Listing Screen](#).

See your SharePoint documentation for complete details about using other options on this screen.

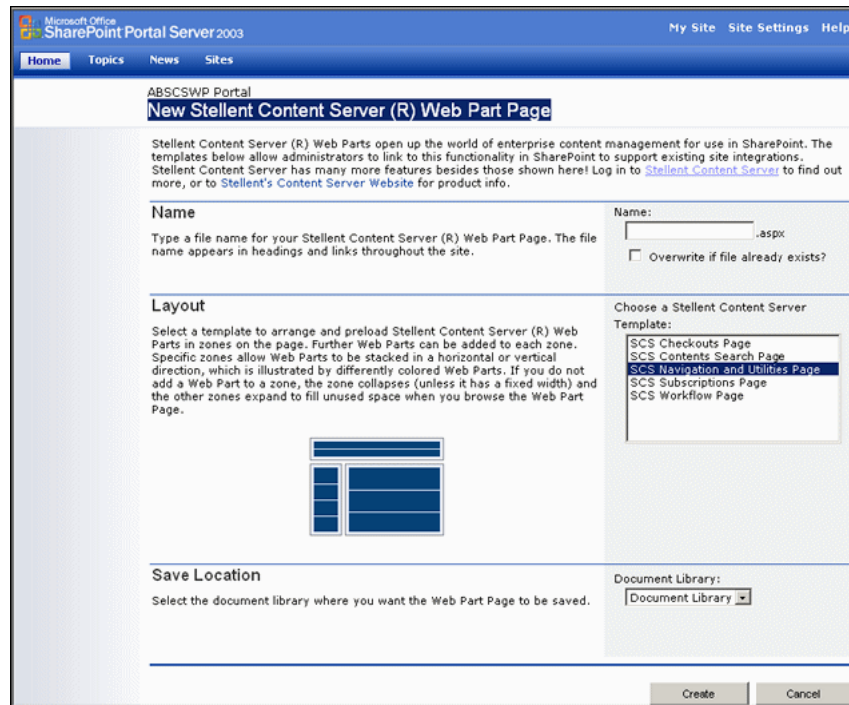
2.5.13 SharePoint Create Page Screen



The SharePoint Create Page Screen is used to add web pages or web part pages to your SharePoint site. To access this page, click **Create** on the [SharePoint Site Content Screen](#).

See your SharePoint documentation for complete details about using other options on this screen.

2.5.14 New Content Server Web Parts Page



The New Web Parts Page is used to configure the Web Parts product portal. To access this screen, select **Content Server Web Parts Page** from the [SharePoint Create Page Screen](#).

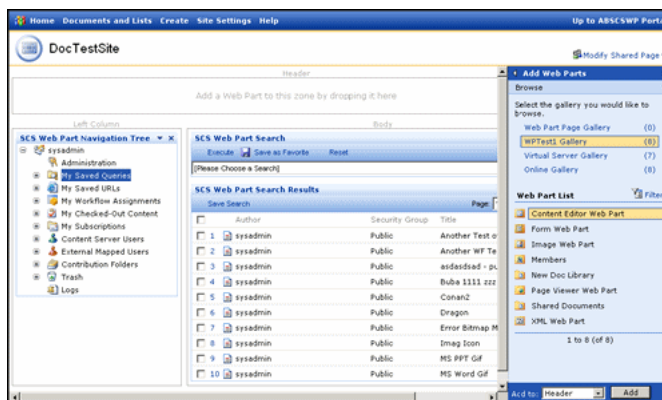
This screen is divided into three sections:

- **Name:** Enter a name for the page. This name will appear in headings, links, and in other areas throughout the Web Parts product site. Consult your SharePoint documentation for details about naming conventions.
- **Layout:** Choose from one of the available layouts. You can later add and subtract elements from each part.
- **Save Location:** Choose the document library from the list where the Web Parts product page will be stored. Any document libraries that were previously created are displayed in the list.

To exit without saving your change, click **Cancel**. When done, click **Create**.

The [New Page Screen](#) is displayed in the layout you selected.

2.5.15 New Page Screen



The New Page screen is displayed after you choose to create a new Web Parts product page. See [Chapter 3, "Using Web Parts"](#) for details about using the functionality on this page. See [Chapter 4, "Customizing the Software"](#) for details about customizing this page.

2.6 Uninstalling the Software

To uninstall the Web Parts product, uninstall the web parts on the SharePoint server. Uninstalling a component means that the content server no longer recognizes the component, but the component files are not deleted from the file system. See your SharePoint documentation for details.

To uninstall a Content Server component, perform these steps using either Component Wizard or Component Manager:

1. Disable the component.
2. Restart the content server.
3. Click **Remove** or **Uninstall**.
4. Restart the content server.

Using Web Parts

This chapter discusses how to use the Web Parts product product. It covers the following topics:

Concepts

- ["Searching and Viewing Content"](#) on page 3-3
- ["Accessing Frequently Used URLs"](#) on page 3-6
- ["Managing Workflows"](#) on page 3-7
- ["Managing Subscriptions"](#) on page 3-9
- ["Sharing Content on the Content Server"](#) on page 3-10

Tasks

- ["Searching Stored Content"](#) on page 3-3
- ["Creating a Query"](#) on page 3-5
- ["Executing a Saved Query"](#) on page 3-5
- ["Removing a Saved Query"](#) on page 3-6
- ["Storing a URL"](#) on page 3-6
- ["Using a Saved URL"](#) on page 3-6
- ["Removing a URL"](#) on page 3-7
- ["Managing Workflows"](#) on page 3-7
- ["Managing Content"](#) on page 3-8
- ["Subscribing to Content"](#) on page 3-9
- ["Viewing Subscription Details and Content"](#) on page 3-10
- ["Unsubscribing from Content"](#) on page 3-10

Interface

- ["Main Page"](#) on page 3-11
- ["Page Header"](#) on page 3-12
- ["Library Listing Screen"](#) on page 3-18
- ["Main Navigation Tree"](#) on page 3-12
- ["Main Page Search Section"](#) on page 3-14
- ["Content Viewer Screen"](#) on page 3-14

- ["Item Properties Screen"](#) on page 3-15
- ["My Saved Queries Folder"](#) on page 3-16
- ["My Saved URLs Folder"](#) on page 3-16
- ["Saved URL Dialog Screen"](#) on page 3-17
- ["My Subscriptions Folder"](#) on page 3-17
- ["Library Listing Screen"](#) on page 3-18
- ["Web Part Pulldown"](#) on page 3-19
- ["Content Check In Screen"](#) on page 3-18
- ["Promote to Oracle UCM Menu"](#) on page 3-19

Important: Your SharePoint system may use a different layout or options than the samples shown in this document. Therefore, the screen representations of pages may be different than those used at your site. Consult your system administrator if you are unsure about how to proceed.

3.1 Accessing the Functionality

To access the Web Parts product, click the appropriate menu option on your SharePoint system. The [Main Page](#) is displayed.

The Portal Page is divided into sections which have different functionality. In this documentation, the main page is divided into three sections:

- The [Main Navigation Tree](#) in the left section: Displays those options that are available to the logged-in user.
- The [Main Page Search Section](#) in the body section: Used to execute searches on stored content.
- The header at the top of the main page: Contains the site name and the Site Actions Menu on the top right corner of the screen. This menu is used to change the layout and number of items on your main page. See [Chapter 4, "Customizing the Software"](#) for details on its use.

3.1.1 General Use Tips

Several shortcuts can be used on the different sections of the page:

- Clicking an item number in a result list causes the default action for that item to occur.
- Clicking the icon next to an item displays a list of available actions for that item.
- Clicking on menu text in the [Main Navigation Tree](#) displays any available listings in the Search Results pane.
- The columns to be displayed can be changed by editing a configuration file. See [Appendix A, "Modifying Configuration Settings"](#) for details.

In addition to these usage shortcuts, a parts submenu is also available.

3.1.1.1 Parts Submenu

A menu is available for each page section. You can access this menu by clicking the down arrow in the top corner of any page section.

This menu contains the following options. When using the **Create** selection on the [Site Actions Menu](#), other options also appear on this menu. Those special options are noted below:

- **Login:** Logs you into the WSS and the Content Server.
- **Logout:** Logs you out of the Web Parts product portal page.
- **Minimize | Restore:** Hides the subsection or restores it if it is hidden.
- **Close:** Removes the section from the page. In order to use the section again, you must choose **Reset Page Content** from the Modify My Page menu. See "[Modifying Web Parts](#)" on page 4-5 for details.
- **Delete:** (Design This Page only): Available for Administrators only. Deletes the section. See "[Modifying Web Parts](#)" on page 4-5 for details.
- **Modify My | Shared Web Part:** Opens the appropriate modification screen, depending on the section of the page that is used.
- **Connections:** (Design This Page only): Used to allow web parts to share data. See your SharePoint documentation for more details.
- **Export:** Used to access a copy of the DWP for the web part. See your SharePoint documentation for more details.

3.2 Searching and Viewing Content

You can search for content in the Content Server in several different ways. This section describes the following tasks:

- [Searching Stored Content](#)
- [Viewing Content](#)
- [Viewing Content Details](#)
- [Creating a Query](#)
- [Executing a Saved Query](#)
- [Removing a Saved Query](#)

3.2.1 Searching Stored Content

Use the following steps to create a listing of **all** content that is available through the Web Parts product:

1. Select **All Fields** from either the Search Forms menu or from the menu in the Web Part Search portion of the [Main Page Search Section](#) in the [Main Page](#).
2. Click **Execute** to run the search.

A listing of all available documents is displayed.

Note: If the system administrator for your site created specialized search forms, these appear in the Search Profiles folder with a search form icon (Figure 3-1). To execute these searches, click the search name then click Execute in the Web Search portion to run the search. See your system administrator for details.

Figure 3-1 Search Form Icon



3.2.2 Viewing Content

Follow these steps to view content checked in to the system.

1. To view content, click one of the following icons:



My workflow assignments



My checked-out content



My subscriptions



Document in a search result

2. Select the method you want to use for viewing. You can view content in different ways:

- **View With Default Viewer:** Use this option to use the viewer that is the designated default for your site.

The following viewing types are available when you view a document from a search result:

- **Native File:** Use this option to view the file as it was originally added to the system.
- **Web Viewable:** Use this option to view the file as it will be viewed on a web site.
- **HTML Rendition:** Use this option to view an alternate file checked in with the item. If no alternate file is available, a message dialog is displayed.

3. When you choose a content item to view, the [Content Viewer Screen](#) is displayed.
4. When done viewing the content item, select **File, Close Window**.

3.2.3 Viewing Content Details

You can also view the metadata associated with a content item. *Metadata* is the data that describes the item, such as its check-in date, number of revisions, and other information.

1. To view an item's details, click one of the following icons:



My workflow assignments



My checked-out content



My subscriptions



Document in a search result

2. Select **Item Properties** from the displayed popup menu.
The [Item Properties Screen](#) is displayed.
3. When you finish viewing details, click **OK**.

3.2.4 Creating a Query

To quickly display search results for searches that you perform often, you can save links to those searches in the [My Saved Queries Folder](#) in the [Main Navigation Tree](#).

Use the following procedure to save a search as a query link:

1. Select **All Fields** from either the Search Forms menu or from the menu in the Web Search portion of the [Main Page Search Section](#) in the [Main Page](#).
2. Specify the search criteria you want to save in the desired fields. If you change your mind about the criteria to be used, click the **Reset** button to clear the entries you made.
3. Click **Execute** to run the search.
4. Click **Save Search** in the SCS Web Parts Search Results portion of the [Main Page Search Section](#).
A prompt dialog is displayed.
5. Enter a title for the saved query. This is the link that will be displayed in the [My Saved Queries Folder](#).
6. Click **OK**.
The new link is displayed in the [My Saved Queries Folder](#).

3.2.5 Executing a Saved Query

Queries that have been saved can be run in one of two ways:

- Click the name of the query in the [My Saved Queries Folder](#). Those queries that do not require a script for execution run immediately. Click **Execute** to run queries requiring a script.
- Select the query name from the list in the SCS Web Search portion of the [Main Page Search Section](#). Click **Execute** to run the query.

The results of the query are displayed in the Results area of the [Main Page Search Section](#).

Note: If the system administrator for your site created specialized search forms, these appear in the Search Forms menu with a search form icon ([Figure 3-1](#)). To execute these searches, click the search name then click **Execute** in the Web Search portion to run the search. See your system administrator for details.

3.2.6 Removing a Saved Query

To remove a query from the [My Saved Queries Folder](#), click the My Saved Query selection icon ([Figure 3-2](#)) for the query you want to remove. A popup menu is displayed. Select **Remove**. The query is removed from the [My Saved Queries Folder](#).

Figure 3-2 My Saved Query Selection Icon



3.3 Accessing Frequently Used URLs

You can use the stored URL function to save the location of web sites that are frequently accessed. This section describes the following tasks:

- [Storing a URL](#)
- [Using a Saved URL](#)
- [Removing a URL](#)

3.3.1 Storing a URL

You can use the stored URL function to save the location of web sites that you frequently access. The URLs are stored on the Content Server for later retrieval.

Use this procedure to save a URL for future use:

1. Click the My Saved URL icon ([Figure 3-3](#)) or on the icon for any previously saved URL.

Figure 3-3 My Saved URL Icon



2. Select **Create New URL** from the popup menu that is displayed.
The [Saved URL Dialog Screen](#) is displayed.
3. Enter the name for the saved URL. This will appear in the [My Saved URLs Folder](#) in the [Main Navigation Tree](#).
4. Enter the URL for the web site.
5. Click **OK** when done. To cancel the save, click **Cancel**.

The new link is displayed in the [My Saved URLs Folder](#).

3.3.2 Using a Saved URL

You can use a saved URL in two ways:

- Click the name of the saved URL in the [My Saved URLs Folder](#).
- Click the My Saved URL icon ([Figure 3-3](#)) next to the URL you want to access and select **View** from the displayed menu.

The target web site is displayed in a new browser window.

3.3.3 Removing a URL

To remove a URL from the [My Saved URLs Folder](#), follow this procedure:

1. Click the My Saved URL icon ([Figure 3-3](#)) next to the URL you want to remove.
A popup menu is displayed.
2. Select **Remove**.

3.4 Managing Workflows

A workflow specifies how content is routed for review and approval before it is released to the system. Users are notified by e-mail when they have a file in the workflow to review. Each workflow can include multiple review and notification steps, and multiple reviewers can be assigned to approve or reject the file at each step. For each step in a workflow, a set of users and a step type must be defined.

Use this procedure to view your workflow assignments and take action on the assignments, if needed:

1. Click the plus sign (+) next to the Workflow Assignment icon ([Figure 3-4](#)) in the [Main Navigation Tree](#).

A list of content items in workflows you are responsible for reviewing is displayed.

Figure 3-4 Workflow Assignment Icon



You can also click the **Workflow Assignment** text and a list of content items is displayed in the Search Results pane. The list in the Search Results pane contains column information about the workflow actions taken and the action date.

2. Click the Assigned Workflow icon ([Figure 3-5](#)) to display a menu for each workflow item.

Figure 3-5 Assigned Workflow Icon



The following options may appear on that menu:

- **Item Properties:** Displays the [Item Properties Screen](#) where you can view metadata for the item.
- **Approve:** If the item is awaiting your action, you can mark it as approved by clicking this option.
- **Reject:** If the item is awaiting your action, you can reject it by clicking this option.
- **Checkin | Checkout:** If the item is available to be checked in or out, you can click this option to perform the action.
- **Undo Checkout:** Used to reset the item status so it is not checked out. A message is displayed indicating that the item is no longer checked out to the current user.

- **View with default viewer:** Displays the [Content Viewer Screen](#) where you can view the item awaiting your action.
- **Workflow Review:** Opens a login screen where you can view details about the workflow review process. After logging in to the Content Server, the Content Server Workflow Review screen is displayed.

A Locked Item icon ([Figure 3–6](#)) indicates that the item has been checked out. It cannot proceed through the workflow review process until it has been checked in.

Figure 3–6 *Locked Item Icon*



3.5 Managing Content

With the Web Parts product you can check in items, check out items, and also change an item's status. This section discusses the following tasks:

- [Viewing Checked-Out Content](#)
- [Checking Out Content](#)
- [Changing an Item's Check-Out Status](#)

3.5.1 Viewing Checked-Out Content

Use this procedure to view your checked-out content:

1. Click the plus sign (+) next to the My Checked Out Content ([Figure 3–7](#)) icon in the [Main Navigation Tree](#).

A list of content items that you have checked out is displayed.

Figure 3–7 *My Checked Out Content Icon*



2. Click the Checked Out icon ([Figure 3–8](#)) in front of an item name to display a menu for each item:

Figure 3–8 *Checked Out Icon*



3. **Item Properties:** Displays the [Item Properties Screen](#) where you can view metadata for the item.
 - **Check In:** Displays the [Content Check In Screen](#) where you add specific details about the current check-in of the item.
 - **View with default viewer:** Displays the [Content Viewer Screen](#) where you can view the item awaiting your action.
 - **Undo Checkout:** Used to reset the item status so it is not checked out. A message is displayed indicating that the item is no longer checked out to the current user.

Tip: Click the item name to view the item's properties.

3.5.2 Checking Out Content

Use this procedure to check out a content item:

1. Locate the item to be checked out by running a search and listing the item. See ["Searching Stored Content"](#) on page 3-3 and ["Executing a Saved Query"](#) on page 3-5 for details.
2. Click the document icon next to the item you want to check out from the Search Results part of the [Main Page Search Section](#).
3. Select **Check-Out** from the displayed popup menu.

The content item name is displayed in the [My Checked-Out Content Folder](#).

3.5.3 Changing an Item's Check-Out Status

Follow these steps to remove the check-out status from a content item:

1. Click the Checked Out icon ([Figure 3-9](#)) in front of an item name in the [My Checked-Out Content Folder](#).

Figure 3-9 Checked Out Icon



2. Select **Undo Check-Out** from the displayed popup menu.

The content item name is removed from the [My Checked-Out Content Folder](#).

3.6 Managing Subscriptions

When you are subscribed to a content item, you are notified automatically whenever a new revision of that item has been checked in to the Content Server. These tasks are involved in managing subscriptions:

- [Subscribing to Content](#)
- [Viewing Subscription Details and Content](#)
- [Unsubscribing from Content](#)

3.6.1 Subscribing to Content

Follow these steps to subscribe to a content item:

1. Locate the item to be subscribed to by running a search and listing the item. See ["Searching Stored Content"](#) on page 3-3 and ["Executing a Saved Query"](#) on page 3-5 for details.
2. Click the document icon next to the item you want to subscribe to from the Search Results part of the [Main Page Search Section](#).
3. Select **Subscribe** from the displayed popup menu.
4. The first time you subscribe to an object, you are prompted to enter your email address. Email notifications will be sent to you when the item's status changes.

5. Click OK after entering your contact information.

The content item name is displayed in the [My Subscriptions Folder](#).

3.6.2 Viewing Subscription Details and Content

You can view details about the content items to which you are subscribed or view the content item itself. See "[Viewing Content](#)" on page 3-4 and "[Viewing Content Details](#)" on page 3-4 for information.

3.6.3 Unsubscribing from Content

Follow these steps to unsubscribe from a content item:

1. Click the subscription icon ([Figure 3-10](#)) next to the name of the subscribed item in the "[My Subscriptions Folder](#)" on page 3-17.

Figure 3-10 Subscription Icon



2. Select **Unsubscribe** from the displayed popup menu.

The content item name is removed from the [My Subscriptions Folder](#).

3.7 Sharing Content on the Content Server

When content is 'promoted' from the SharePoint server to the Content Server, it is checked out from the SharePoint server. The item remains in SharePoint, but it cannot be edited on the SharePoint system until it is returned.

Important: Pages are promoted from the SharePoint server, not from the Web Parts product page.

To promote an item to the Content Server, follow these steps:

1. Select the Document Library where the page is stored from the list on the [SharePoint Site Content Screen](#).

The [Library Listing Screen](#) is displayed.

2. Rest your cursor on the content item to be promoted.

The [Web Part Pulldown](#) is displayed.

3. Select **Promote to Oracle UCM** from the [Promote to Oracle UCM Menu](#).

The [Content Check In Screen](#) is displayed.

4. Fill in the appropriate information. Click **OK** when done.

When an item has been promoted to the Content Server, it can no longer be edited in the SharePoint system. The item is viewable, but cannot be changed until it is brought back for editing.

To return an item to SharePoint, follow these steps:

1. Select the Document Library where the page is stored from the list on the [SharePoint Site Content Screen](#).

- The [Library Listing Screen](#) is displayed.
2. Rest your cursor on the content item to be returned.
The [Web Part Pulldown](#) is displayed.
 3. Select **Return to SharePoint** from the [Promote to Oracle UCM Menu](#). This option appears for those items which have been promoted and are now available for return.

3.8 Interface Screens

The following screens are used when accessing the Web Parts product:

- [Main Page](#)
- [Page Header](#)
- [Library Listing Screen](#)
- [Main Navigation Tree](#)
- [Main Page Search Section](#)
- [Content Viewer Screen](#)
- [Item Properties Screen](#)
- [My Saved Queries Folder](#)
- [My Saved URLs Folder](#)
- [Saved URL Dialog Screen](#)
- [My Subscriptions Folder](#)
- [Library Listing Screen](#)
- [Web Part Pulldown](#)
- [Content Check In Screen](#)
- [Promote to Oracle UCM Menu](#)

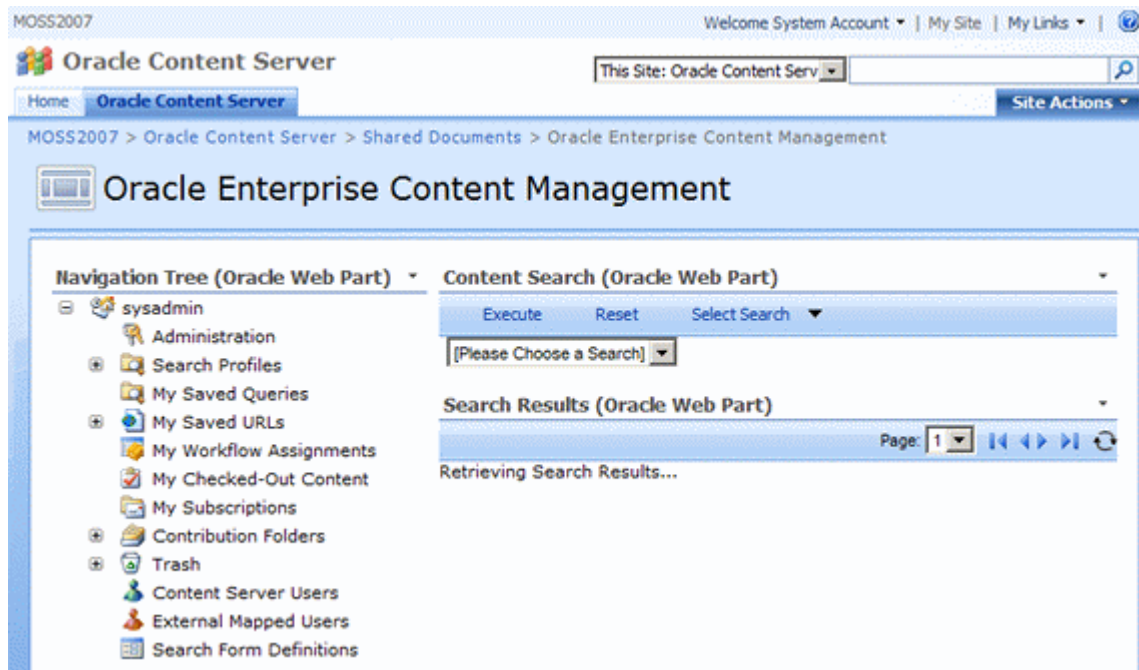
3.8.1 Main Page

The main page contains the elements of the Web Parts product that have been selected for use at your site. This screen can be customized to create a page that addresses the specific needs of users in your environment. Because of that, the screen shown here may differ than the one in use at your site.

This screen is divided into several different sections:

- [Page Header](#)
- [Main Navigation Tree](#)
- [Main Page Search Section](#)

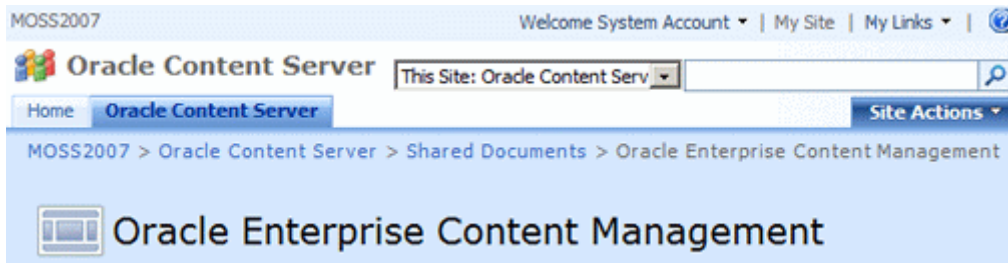
Click the section down arrow to display a menu containing options available for that portal section.



3.8.2 Page Header

The Page Header contains the customized icon and header text for your page. See ["Choosing a Page to Customize \(Admin Only\)"](#) on page 4-2 for details about customizing the header.

The [Site Actions Menu](#) is also available in the header section. See [Chapter 4, "Customizing the Software"](#) for details about using the options on this menu.
















3.8.3 Main Navigation Tree











The Main Navigation Tree contains those options which have been selected for use at your site. This provides you with a quick access point to all actions you are allowed to perform. The Navigation Tree shown here displays common options. Only those users who have the Administrative role will see all of these options.



Options on the Navigation Tree vary from site to site. Web parts can be added and removed, according to what is needed for each enterprise.

Tip: If you click the text next to the icons in the Navigation tree, a list of items is displayed in the Search Results portion of the [Main Page Search Section](#). For example, if you click My Saved URLs, a list of saved URLs is displayed in the Search Results pane.

Navigation Tree (Oracle Web Part) ▾

- [-]  sysadmin
 -  Administration
 - [+]  Search Profiles
 -  My Saved Queries
 - [+]  My Saved URLs
 -  My Workflow Assignments
 -  My Checked-Out Content
 -  My Subscriptions
 - [+]  Contribution Folders
 - [+]  Trash
 -  Content Server Users
 -  External Mapped Users
 -  Search Form Definitions

Icon	Description
	The home icon is accompanied by the name of the logged in user.
	Administration (Admin Only): Opens the Main Admin Screen where administrators can modify aspects of the system.
	My Saved Queries: Displays a list of queries that were created and saved. See " Creating a Query " on page 3-5 for more details.
	My Saved URLs: Displays a list of saved URLs. See " Storing a URL " on page 3-6 for details.
	My Workflow Assignments: Displays a list of content items currently in workflow and assigned to this user for review.
	My Checked Out Content: Displays the names of content items that are checked out by the logged in user.
	My Subscriptions: Displays the names of content items to which the user is currently subscribed. See " Subscribing to Content " on page 3-9 for details.
	Content Server Users: Displays a list of users who have a Content Server account.
	External Mapped Users: Displays a listing of users who are defined on the SharePoint server and who are mapped to a different Content Server user identity.
	Search Form Definition: Displays previously created search forms, which can be used to screen content. See " Choosing a Page to Customize (Admin Only) " on page 4-2 for details.

Icon	Description
	Contribution Folders: If folders are installed, accesses a list of folders.
	Trash: If folders are installed, accesses the folder trash directory.


3.8.4 Main Page Search Section

The Search Section of the main page is divided into two areas: the Web Parts Search and the Web Parts Search Results.

- The Web Parts Search area is used to select a saved search or to select **All Fields** in order to select fields for searching.
- The Web Parts Search Results area displays the result of the executed search.


See "[Searching Stored Content](#)" on page 3-3 and "[Creating a Query](#)" on page 3-5 for details.



Content Search (Oracle Web Part)

Execute  Save as Favorite Reset Select Search ▼

[Please Choose a Search] ▼





Search Results (Oracle Web Part)

Save Search Page: 1 

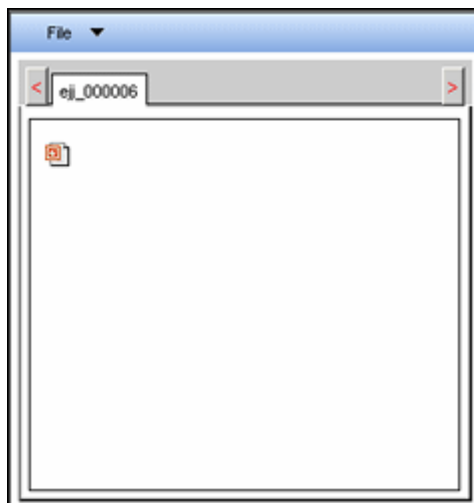
	Title	Author	Security Group	Content ID
1	 Editor screen Shot	sysadmin	Public	Editor
2	 WCM Roadmap	sysadmin	Public	WCMRoadmap

3.8.5 Content Viewer Screen

The Content Viewer screen is used to preview content items. To access this screen, select a viewing option after clicking any of the following icons:

-  My workflow assignments
-  My checked-out content
-  My subscriptions
-  Document in a search result

If you have previously viewed content, the screen displays tabs with the name of the previously displayed content item in each tab. Clicking on a tab displays a page with that content.



The following options are available from the File menu on this screen:

- **Open in New Window:** Displays the item in a new window.
- **Close Active Tab:** Closes the current content page.
- **Close All But Active Tab:** Closes all previously displayed content and keep only the active content page open.
- **Close All Tabs:** Closes all pages but keep the Content Viewer Screen open.
- **Close Window:** Closes the Content Viewer Screen.

3.8.6 Item Properties Screen

The Item Properties screen displays the metadata associated with the content item as well as information about revisions.

To access this screen, click any of the following icons:



My workflow assignments



My checked-out content

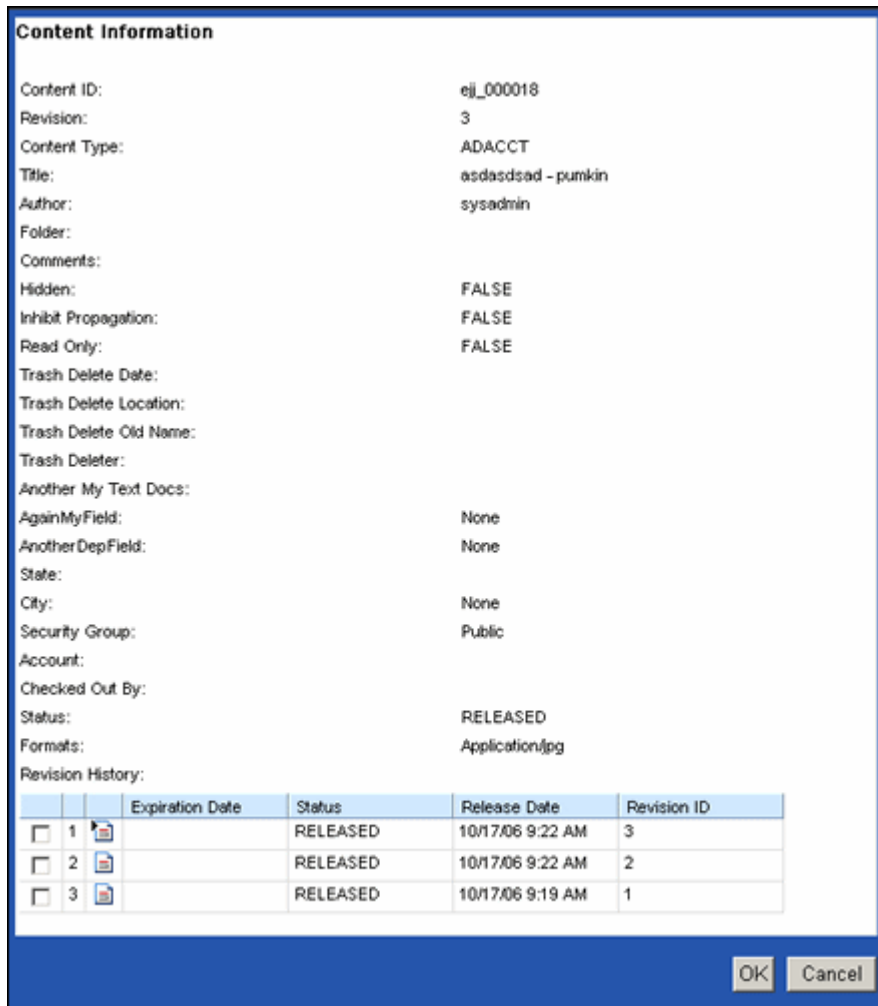


My subscriptions



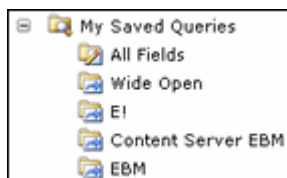
Document in a search result

Select Item Properties from the displayed menu. **Item Properties** is used to view the metadata about a content item, such as its content ID, check-in information, and revisions. It is not used to view the actual content item. When done, click **OK**.



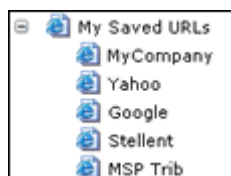
3.8.7 My Saved Queries Folder

The My Saved Queries portion of the [Main Navigation Tree](#) displays the queries that were created and saved for the logged-in user. See "[Creating a Query](#)" on page 3-5 for details.



3.8.8 My Saved URLs Folder

The My Saved URLs portion of the [Main Navigation Tree](#) displays the URLs that were saved for the logged-in user. See "[Storing a URL](#)" on page 3-6 for details.



3.8.9 Saved URL Dialog Screen

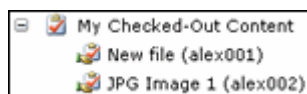
The Saved URL Dialog screen is displayed when a query is created. To access this screen, select **Create New URL** from the popup menu when an icon is clicked in the [My Saved URLs Folder](#). See "[Storing a URL](#)" on page 3-6 for details.



Field	Description
Name	The name for the link that will appear in the My Saved URLs Folder .
URL	The web site location for the URL to be associated with the name.

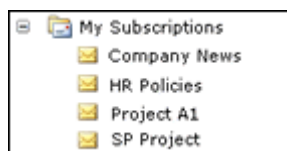
3.8.10 My Checked-Out Content Folder

The My Checked-Out Content portion of the [Main Navigation Tree](#) displays the content checked out to the current user. See "[Checking Out Content](#)" on page 3-9 for details.



3.8.11 My Subscriptions Folder

The My Subscriptions portion of the [Main Navigation Tree](#) displays the subscriptions created and saved for the logged-in user. See "[Subscribing to Content](#)" on page 3-9 for details.



3.8.12 Content Check In Screen

The Content Check In form is used to add information about items being checked into the Content Server. To access this screen, click **Check In** from the Checkout Out icon (Figure 3–11) menu.

Figure 3–11 *Checked Out Icon*



Content Check In Form

Content ID alex002

Title:

Content Type:

Formats:

Author:

Security Group:

Account:

dRevisionID:

Revision:

Release Date:

Expiration Date:

Original File Name:

Primary File:

Format:

Alternate File:

Format:

Comments:

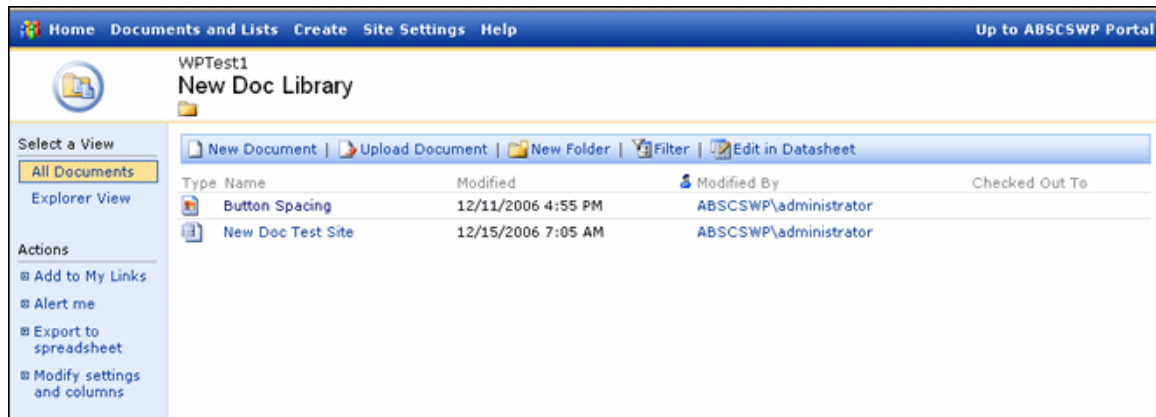
Release Date:

Expiration Date:

3.8.13 Library Listing Screen

The Library Listing screen shows those web parts that are available for use. To access this page, select the library name from the [SharePoint Site Content Screen](#).

See your SharePoint documentation for complete details about using other options on this screen.



3.8.14 Web Part Pulldown

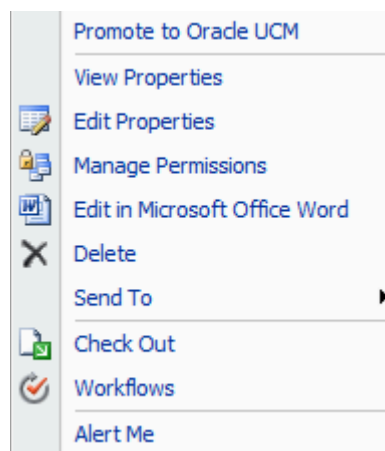
The Web Part Pulldown is available by resting the cursor on the web part name in the [Library Listing Screen](#). This menu is used to promote content for use in the SharePoint server. See "[Sharing Content on the Content Server](#)" on page 3-10 for details.

Type	Name	Modified	Modified By
	Button Spacing	12/11/2006 4:55 PM	ABSCSWP\administrator
	New Doc Test Site	12/15/2006 7:05 AM	ABSCSWP\administrator

3.8.15 Promote to Oracle UCM Menu

The Promote to Oracle UCM menu is used to store content on the Content Server for use on other sites. To access this menu, rest the cursor on a content name. The [Web Part Pulldown](#) is displayed. Click the down arrow to display the menu.

See your SharePoint documentation for complete details about using other options on this menu.



Customizing the Software

Both administrators and non-administrative users can customize the Web Parts product for their personal use. This chapter discusses how to customize the product for all users, which is an administrative function, and for personal use.

See [Chapter 5, "Administering the Software"](#) for details about administering the product, including changing directory paths, defaults, and troubleshooting information. See [Appendix A, "Modifying Configuration Settings"](#) for details about further customizations that can be performed by system administrators.

Tasks

- ["Choosing a Page to Customize \(Admin Only\)"](#) on page 4-2
- ["Designing Custom Search Forms \(Admin Only\)"](#) on page 4-3
- ["Adding Web Parts \(Admin Only\)"](#) on page 4-3
- ["Add Web Parts by Browsing"](#) on page 4-4
- ["Add Web Parts by Searching"](#) on page 4-4
- ["Add Web Parts by Importing"](#) on page 4-4
- ["Customizing the Title Bar \(Admin Only\)"](#) on page 4-6
- ["Customizing the Navigation Tree"](#) on page 4-6
- ["Customizing the Search Criteria Section"](#) on page 4-7
- ["Modifying the Layouts and Advanced Settings"](#) on page 4-8
- ["Customizing the Search Results Section"](#) on page 4-8
- ["Designing the Page"](#) on page 4-10
- ["Creating a Web Part Page \(Admin Only\)"](#) on page 4-10

Interface

- ["Site Actions Menu"](#) on page 4-11
- ["Search Form Options Screen \(Admin Only\)"](#) on page 4-12
- ["Define New Search Form Screen \(Admin Only\)"](#) on page 4-12
- ["Adding Web Parts \(Admin Only\)"](#) on page 4-3
- ["Add Web Parts \(Browse\) Screen \(Admin Only\)"](#) on page 4-14
- ["Add Web Parts \(Search\) Screen \(Admin Only\)"](#) on page 4-15
- ["Add Web Parts \(Import\) Screen \(Admin Only\)"](#) on page 4-16

- ["Change Page Title Screen \(Admin Only\)"](#) on page 4-17
- ["Change Navigation Tree Screen"](#) on page 4-18
- ["Change Search Criteria Screen"](#) on page 4-19
- ["Change Search Results Screen"](#) on page 4-20
- ["Layout Settings Screen"](#) on page 4-21
- ["Advanced Settings Screen"](#) on page 4-22
- ["WSS Data Settings Screen"](#) on page 4-23
- ["Create Screen \(Admin Only\)"](#) on page 4-24
- ["New Web Part Page Screen \(Admin Only\)"](#) on page 4-24

4.1 Customization Tasks

You can alter the layout, wording, and appearance of the different parts of your **Web Parts** product page. If you log in as an administrator, you can change the appearance for all users at your site. Users can also change the page to suit their personal preferences.

This section describes how to customize the **Web Parts** product page. Functionality that is only available to administrators is indicated by the words **Admin Only** in the title. This section covers the following topics:

- ["Choosing a Page to Customize \(Admin Only\)"](#) on page 4-2
- ["Designing Custom Search Forms \(Admin Only\)"](#) on page 4-3
- ["Adding Web Parts \(Admin Only\)"](#) on page 4-3
- ["Modifying Web Parts"](#) on page 4-5
- ["Customizing the Title Bar \(Admin Only\)"](#) on page 4-6
- ["Customizing the Navigation Tree"](#) on page 4-6
- ["Customizing the Search Criteria Section"](#) on page 4-7
- ["Customizing the Search Results Section"](#) on page 4-8
- ["Designing the Page"](#) on page 4-10

4.1.1 Choosing a Page to Customize (Admin Only)

If you log in as an Administrator, you have the option to modify the page for all users or only for yourself.

- To modify the page for all users, click **Edit Page** on the Site Actions Menu.
- To modify the page for your own use, click **Personalize this Page** on the "Welcome *username*" menu at the top of the Web Parts page.

A box is displayed around the shared icon ([Figure 4-1](#)) or the personal icon ([Figure 4-2](#)), indicating which option is selected.

Figure 4-1 Shared Icon



Figure 4–2 Personal Icon

4.1.2 Designing Custom Search Forms (Admin Only)

If you log in as an administrator, you can design a custom search form that limits the metadata seen by users. This enables you to minimize the data that users can see and also simplifies their search process.

Follow these steps to design a custom search form:

1. Click **Search Form Definitions** on the [Main Navigation Tree](#).
The [Search Form Options Screen \(Admin Only\)](#) is displayed.
2. From the list of display names and fields, select a definition to use for your search form. You can modify the fields that are included in the search.
3. Click **Create Form**.
The [Define New Search Form Screen \(Admin Only\)](#) is displayed.
4. Enter a name for the new search form.
5. Add or remove fields to be included in the search.

Click **Cancel** to exit without saving the search form. Click **OK** when done.

The new search is displayed in the Search Forms folder with a search form icon ([Figure 4–3](#)), which is different than the icon used for personally created queries ([Figure 4–4](#)).

Figure 4–3 Search Form Icon**Figure 4–4 Personally Created Queries Icon**

4.1.3 Adding Web Parts (Admin Only)

Administrators can delete or add web parts to the page. Any changes that are made will be available to all users who have access to the page.

Use this procedure to modify the content of the web parts page:

1. Click the [Site Actions Menu](#) and select **Edit Page**.
The [Add/Edit Web Parts Screen](#) is displayed.
2. Click **Add a Web Part** above a section of the Web Parts page that you want to modify.
The [Add Web Parts Options Screen \(Admin Only\)](#) is displayed.
3. You can select options from the list of web parts, and click **Add** when you are done.

Alternately, on the Add Web Parts Options List you can click **Advanced Web Parts gallery and options** to use one of the following methods to add web parts to any section of the page:

- [Add Web Parts by Browsing](#)
- [Add Web Parts by Searching](#)
- [Add Web Parts by Importing](#)

On any of these screens to widen the screen, click the arrow icon next to the title of the screen. When done, click the X icon at the top right corner of the screen. The screen closes.

4.1.3.1 Add Web Parts by Browsing

If you select **Advanced Web Parts gallery and options** on the [Add Web Parts Options Screen \(Admin Only\)](#), the [Add Web Parts \(Browse\) Screen \(Admin Only\)](#) is displayed. Use this screen to search through galleries for additional web parts to add to your page.

1. Select the gallery you want to use. A list of available elements is displayed at the bottom of the screen.

Tip: Rest the cursor on each gallery name. A brief description of the gallery and its contents is displayed.

2. Click the web part you want to use.
3. Use the **Add to** menu to select the area of the page where the element will be inserted. Available options depend on what type of layout you chose for your Web Parts product page.
4. Click **Add** when done to insert the web part.

The new element is added to the location you specified. Use this procedure to continue adding more elements to your page.

4.1.3.2 Add Web Parts by Searching

If you select **Advanced Web Parts gallery and options** on the [Add Web Parts Options Screen \(Admin Only\)](#), the [Add Web Parts \(Browse\) Screen \(Admin Only\)](#) is displayed. Use the arrow in the Browse header to select **Search**. The [Add Web Parts \(Search\) Screen \(Admin Only\)](#) is displayed. Use this screen to search for a specific element to include on your page.

1. Enter the search term to use.
2. Click **Go**.
3. All available galleries are searched.
4. Use the **Add to** menu to select the area of the page where the element will be inserted. Available options depend on what type of layout you chose for your Web Parts product page.
5. Click **Add** when done to insert the web part.

4.1.3.3 Add Web Parts by Importing

If you select **Advanced Web Parts gallery and options** on the [Add Web Parts Options Screen \(Admin Only\)](#), the [Add Web Parts \(Browse\) Screen \(Admin Only\)](#) is displayed.

Use the arrow in the Browse header to select **Import**, the [Add Web Parts \(Import\) Screen \(Admin Only\)](#) is displayed. Use this screen to import customized web parts, such as titles and help links.

1. Enter the file name with the .dwp extension or use the Browse button to search for a web part.
2. After selecting a file to import, click **Upload**.
3. Select the area of the page where the element will be inserted. Available options depend on what type of layout you chose for your Web Parts product page.
4. Click **Add** when done.

4.1.4 Modifying Web Parts

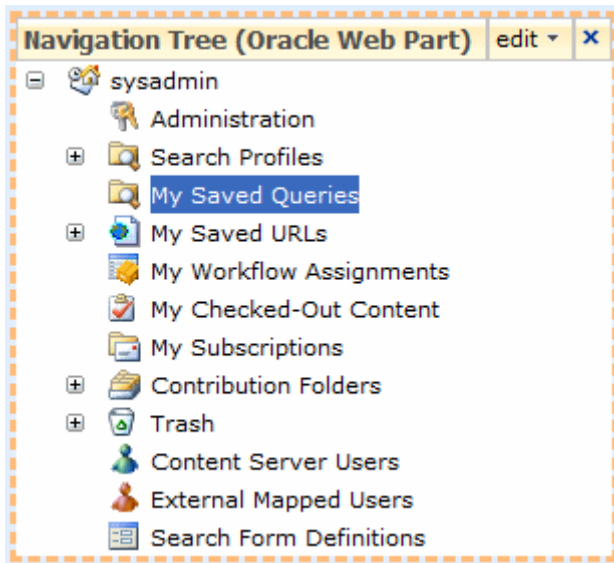
You can modify individual sections of the Web Parts product page by selecting **Edit Parts** on the [Site Actions Menu \(Admin Only\)](#), or by selecting **Show Personal View** on the **Welcome username** menu and then selecting **Edit Parts** on the [Site Actions Menu](#) to modify your personal page.

Administrators can change the title bar on the Web Parts product page. All users can change the navigation tree, search criteria pane, and the search result pane for their personal use. This section describes the following tasks:

- "[Customizing the Title Bar \(Admin Only\)](#)" on page 4-6
- "[Customizing the Navigation Tree](#)" on page 4-6
- "[Customizing the Search Criteria Section](#)" on page 4-7
- "[Customizing the Search Results Section](#)" on page 4-8

Note:: If you modified shared web parts and closed a web part using the [Parts Submenu](#), that web part no longer appears on the Change Web Parts menu. Only active web parts appear on the menu. In addition, if you checked Hidden on the Layout portion for the section, (Hidden) is displayed in front of the title.

When you modify a section of the page, highlighting is displayed around the section, indicating which area is being changed. For example, [Figure 4-5](#) shows My Saved Queries highlighted, indicating that the Search Results section of the web parts page is being changed.

Figure 4–5 Modification highlighting

Clicking the down arrow next to **edit** in the header displays the [Parts Submenu](#), which can be used to quickly change aspects of the section. Clicking the **X** closes the screen.

4.1.4.1 Customizing the Title Bar (Admin Only)

Follow this procedure to customize the title bar of the **Web Parts** product page.

1. Select **Edit Title Bar Properties** from the **Web Parts** page in Edit Mode.
The [Change Page Title Screen \(Admin Only\)](#) is displayed.
2. Enter the title to be displayed at the top of the page.
3. Enter a caption to appear above the title.
4. Enter a description. This description is displayed on any listings of the page.
5. To use an alternate icon to appear with the title, enter the pathname where the image is located.
6. To view the results of your changes, click **Apply**. To save the changes, click **OK**. To cancel the changes, click **Cancel**.

4.1.4.2 Customizing the Navigation Tree

Follow this procedure to customize the navigation section of the **Web Parts** product page.

1. Select **edit** in the header for the **Navigation Tree (Oracle Web Part)** section of the **Web Parts** page in Edit Mode. If the **Navigation Title** has been previously changed, that title appears on the menu in place of **Navigation Tree (Oracle Web Part)**.
The [Change Navigation Tree Screen](#) is displayed.
2. Enter the title to be displayed at the top of the navigation section.
3. Select a height for the section. Click **Yes** if you want to enter a specific height for the navigation section. Click **No** to adjust the height to fit the designated section.
4. Select a width for the section. Click **Yes** if you want to enter a specific width for the navigation section. Click **No** to adjust the width to fit the designated section.

5. Select a Chrome State for the section. If you want to have the section always minimized, click **Minimized**. If you want the section to always be available, click **Normal**. Minimized sections can be maximized by clicking on the maximize icon.
6. Select a Chrome Type for the section. The options include:
 - **Default**: The default for your SharePoint system.
 - **None**: no frame will appear around the navigation section.
 - **Title and Border**: A colored title bar and thin border is displayed around the section.
 - **Title Only**: A colored title bar is displayed with no border.
 - **Border Only**: A thin border is displayed around the section.
7. Change the layout and link information. See "[Modifying the Layouts and Advanced Settings](#)" on page 4-8 for details.
8. To view the results of your changes, click **Apply**. To save the changes, click **OK**. To cancel the changes, click **Cancel**.

4.1.4.3 Customizing the Search Criteria Section

Follow this procedure to customize the navigation section of the Web Parts product page.

1. Select edit in the header for the Content Search (Oracle Web Part) section of the Web Parts page in Edit Mode. If the Content Search section title has been previously changed, that title appears on the menu in place of **Content Search (Oracle Web Part)**.

The [Change Search Criteria Screen](#) is displayed.
2. Enter the title to be displayed at the top of the section.
3. Select a height for the section. Click **Yes** if you want to enter a specific height for the section. Click **No** to adjust the height to fit the designated zone.
4. Select a width for the section. Click **Yes** if you want to enter a specific width for the section. Click **No** to adjust the width to fit the designated zone.
5. Select a Chrome State for the section. If you want to have the section always minimized, click **Minimized**. If you want the section to always be available, click **Normal**. Minimized sections can be maximized by clicking on the maximize icon.
6. Select a Chrome Type for the section. The options include:
 - **Default**: The default for your SharePoint system.
 - **None**: no frame will appear around the section.
 - **Title Bar and Border**: A colored title bar and thin border is displayed around the section.
 - **Title Bar Only**: A colored title bar is displayed with no border.
 - **Border Only**: A thin border is displayed around the section.
7. Change the layout and link information. See "[Modifying the Layouts and Advanced Settings](#)" on page 4-8 for details.

To view the results of your changes, click **Apply**. To save the changes, click **OK**. To cancel the changes, click **Cancel**.

4.1.4.4 Customizing the Search Results Section

Follow this procedure to customize the search results section of the **Web Parts** product page.

1. Select edit in the header for the Search Results (Oracle Web Part) section of the Web Parts page in Edit Mode. If the Search Results title has been previously changed, that title appears on the menu in place of **Search Results (Oracle Web Part)**.
The [Change Search Results Screen](#) is displayed.
2. Enter the title to be displayed at the top of the section.
3. Select a height for the section. Click **Yes** if you want to enter a specific height for the section. Click **No** to adjust the height to fit the designated zone.
4. Select a width for the section. Click **Yes** if you want to enter a specific width for the section. Click **No** to adjust the width to fit the designated zone.
5. Select a Chrome State for the section. If you want to have the section always minimized, click **Minimized**. If you want the section to always be available, click **Normal**. Minimized sections can be maximized by clicking on the maximize icon.
6. Select a Chrome Type for the section. The options include:
 - **Default**: The default for your SharePoint system.
 - **None**: no frame will appear around the section.
 - **Title Bar and Border**: A colored title bar and thin border is displayed around the section.
 - **Title Bar Only**: A colored title bar is displayed with no border.
 - **Border Only**: A thin border is displayed around the section.
7. Change the layout and link information. See "[Modifying the Layouts and Advanced Settings](#)" on page 4-8 for details.
8. Click the Maximize button (+) next to **WSS Data** to change the WSS Data information. See "[Modifying WSS Data](#)" on page 4-9 for details.

To view the results of your changes, click **Apply**. To save the changes, click **OK**. To cancel the changes, click **Cancel**.

4.1.4.5 Modifying the Layouts and Advanced Settings

If you click the Maximize button (+) next to Layout or Advanced on a customization page, the [Layout Settings Screen](#) or [Advanced Settings Screen](#) are displayed.

Use the Layout portion of the edit screen to change the following information:

- **Hidden**: Check this box to hide the section on the page. If this box is unchecked, the section is visible.
- **Direction**: Select the direction in which text will flow. Options include:
 - Left to right: Icons appear on the left of menu text
 - Right to left: Icons appear on the right side of menu text
 - None: The default for your system is used.
- **Zone Index**: Select the location for the section in relation to other web parts in that zone.
 - Header: The section is displayed in the top portion of the page.

- Left column: The section is displayed in the left portion of the page.
- Body: The section is displayed in the center, larger portion of the page.

Use the Advanced portion of the edit screen to change the following information. This information is retained with the web part if it is exported at a later time:

- **Allow Minimize:** If checked, this option is displayed on the section's submenu, enabling users to minimize the section and display only the title.
- **Allow Close:** If checked, this option is displayed on the section's submenu, enabling users to close the section. If a section is closed, it is no longer accessible and must be inserted again by modifying the web parts. See "[Adding Web Parts \(Admin Only\)](#)" on page 4-3 for details.
- **Allow Hide:** If checked, this option is hidden on the section's submenu.
- **Allow Zone Change:** If checked, this option is displayed on the section's submenu, enabling users to move the section to a different zone.
- **Allow Connections:**
- **Allow Editing in Personal View:** If checked, this option enables users to edit the section for their personal view of the web page.
- **Export Mode:** Enables exporting for re-use in other pages. Options include the following:
 - Export all data
 - Non-sensitive data only
- **Title URL:** Link to detail information.
- **Description:** A description of the web part used in the section.
- **Help URL:** A link to the help file for this web part.
- **Help Mode:** The help mode to use. Options include the following:
 - Modal
 - Modeless
 - Navigate
- **Catalog Icon Image URL:** The pathname to the icon file to be used for the web part.
- **Title Icon Image URL:** The pathname to the icon file to be used for the web part.
- **Import Error Message:** The error message displayed if the web part for this section is missing.
- **Target Audiences:** Specifies the audiences for this web part. Icons are provided to enable you to check names, or to Browse for names by using a Select Audiences screen.

To view the results of your changes, click **Apply**. To save the changes, click **OK**. To cancel the changes, click **Cancel**.

4.1.4.6 Modifying WSS Data

If you click the Maximize button (+) next to WSS Data on the [Change Search Results Screen](#), the [WSS Data Settings Screen](#) is displayed. Use this portion of the edit screen to change the search stack, the search name, the context menu folder, and to indicate whether the search is dynamic. See your SharePoint documentation for more details.

To view the results of your changes, click **Apply**. To save the changes, click **OK**. To cancel the changes, click **Cancel**.

4.1.5 Designing the Page

Additional menu options are available on the [Parts Submenu](#) in the top right corner of each section. Those special options are noted below:

- **Login:** Logs you into the WSS and the Content Server.
- **Logout:** Logs you out of the Web Parts product portal page.
- **Minimize | Restore:** Hides the subsection or restores it if it is hidden.
- **Close:** Removes the section from the page. You can also close a section by clicking the X in the upper right corner of the section. To add the section back, click **Reset Page Content** on the Modify My Page menu. If you are an administrative user and closed the section for all users (Shared View), add the section back by using the **Add Web Parts** option on the Modify My Page menu. The section is made available in the Galleries list in the Browse option.
- **Delete:** (Admin Only): Deletes the section. If the section was imported, it is no longer accessible and a DWP file describing it must be imported again. If the section came from an available gallery accessible through the Browse option, it will still be there for later use.
- **Modify My | Shared Web Part:** Opens the appropriate modification screen, depending on the section of the page that is used.
- **Connections:** (Admin Only): Used to allow web parts to share data. See your SharePoint documentation for more details.
- **Export:** (Admin Only): Used to access a copy of the DWP for the web part. See your SharePoint documentation for more details.

4.1.6 Creating a Web Part Page (Admin Only)

Administrators can create a new Web Part Page, which is a collection of web parts. Administrators can design the layout and content of a Web Part Page for all users, and the web parts can optionally be personalized by individual users.

To create a new Web Part Page, follow these steps:

1. Click **Site Actions**, then click **Create**. The [Create Screen \(Admin Only\)](#) is displayed.
2. In the Web Pages column, click **Web Part Page**. The [New Web Part Page Screen \(Admin Only\)](#) is displayed.
3. Enter a name for the new Web Part Page. If you have an existing file with the same and want to overwrite it, check the box for **Overwrite if the file already exists?**
4. Select a layout template from the list of available templates. This arranges web parts in sections on the Web Part Page.
5. Select the document library in which to store the Web Part Page from the Document Library menu.
6. Click **Create**.

4.2 The Customization Interface

The following screens are used when customizing the Web Parts product page:

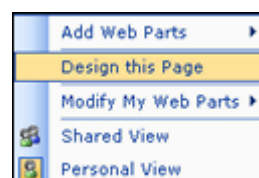
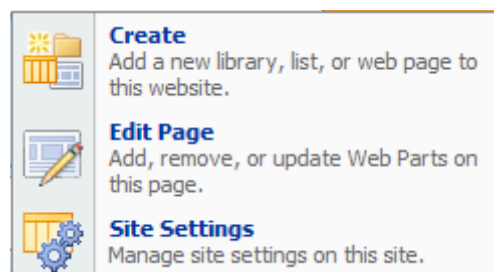
- [Site Actions Menu](#)
- [Search Form Options Screen \(Admin Only\)](#)
- [Define New Search Form Screen \(Admin Only\)](#)
- [Adding Web Parts \(Admin Only\)](#)
- [Add Web Parts \(Browse\) Screen \(Admin Only\)](#)
- [Add Web Parts \(Search\) Screen \(Admin Only\)](#)
- [Add Web Parts \(Import\) Screen \(Admin Only\)](#)
- [Change Page Title Screen \(Admin Only\)](#)
- [Change Navigation Tree Screen](#)
- [Change Search Criteria Screen](#)
- [Change Search Results Screen](#)
- [Layout Settings Screen](#)
- [Advanced Settings Screen](#)
- [WSS Data Settings Screen](#)
- [Create Screen \(Admin Only\)](#)
- [New Web Part Page Screen \(Admin Only\)](#)

4.2.1 Site Actions Menu

The Site Actions menu is used manage a Web Parts website and page. To access the menu selections, click the **Site Actions** tab above the Page Header.

The following options are available:

- **Create:** Add a new library, list, or web page to this website.
- **Edit Page:** Add, remove, or update Web Parts on this page.
- **Site Settings:** Manage site settings on this site.



4.2.2 Search Form Options Screen (Admin Only)

The Search Form Options screen is used to help define a new Search Form. To access this screen, click **Search Form Definitions** in the [Main Navigation Tree](#). The Search Form Options Screen is displayed in the [Main Page Search Section](#).

See "[Designing Custom Search Forms \(Admin Only\)](#)" on page 4-3 for details about creating a custom search form.

Create Form		Page: 1
	DisplayName	FieldList
1	All Fields	*
2	By Title	dDocTitle
3	By Author	dDocAuthor
4	By Author and Title	dDocAuthor,dD...

4.2.3 Define New Search Form Screen (Admin Only)

The Define New Search Form Screen is used to create a title for a defined search and to alter any fields used in the search. To access this page, click **Create Form** on the [Search Form Options Screen \(Admin Only\)](#). See "[Designing Custom Search Forms \(Admin Only\)](#)" on page 4-3 for details about creating a custom search form.

Define the new Search Form.

Displayed Name

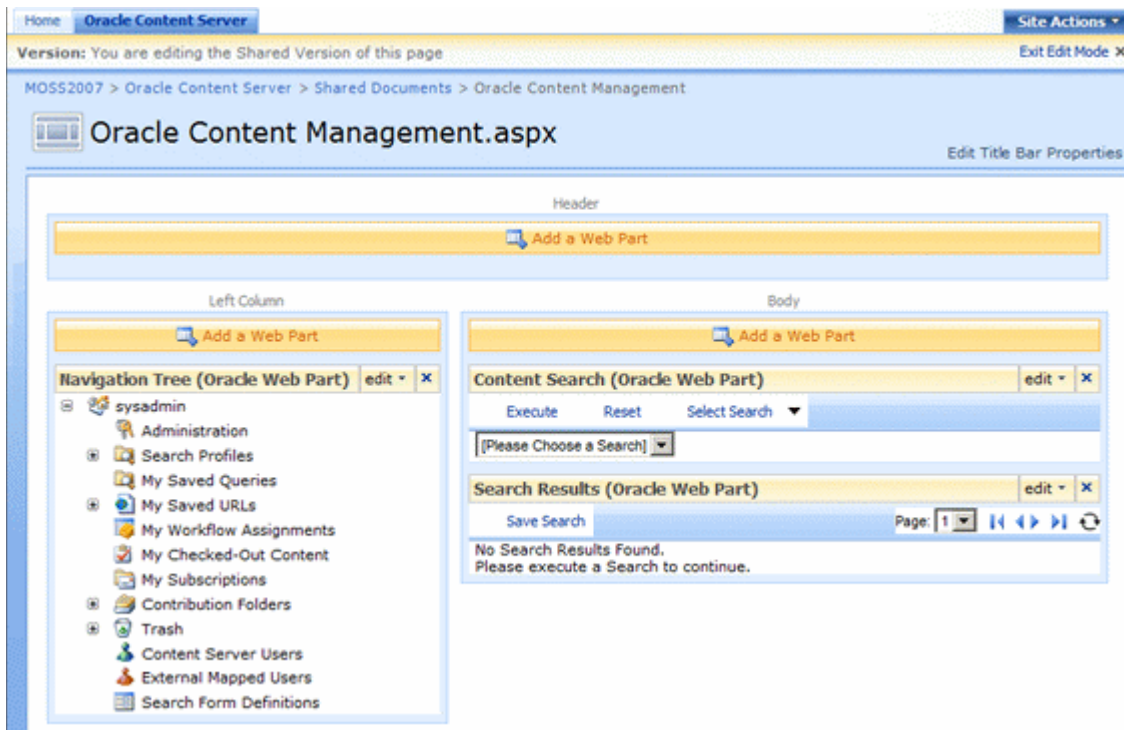
Field List (Comma Delimited)

4.2.4 Add/Edit Web Parts Screen

The Add/Edit Web Parts screen is used to add, remove, or update the appearance of the Web Parts page. Administrators can customize the Web Parts page used by all users (the shared view). Individual users can personalize their own Web Parts page.

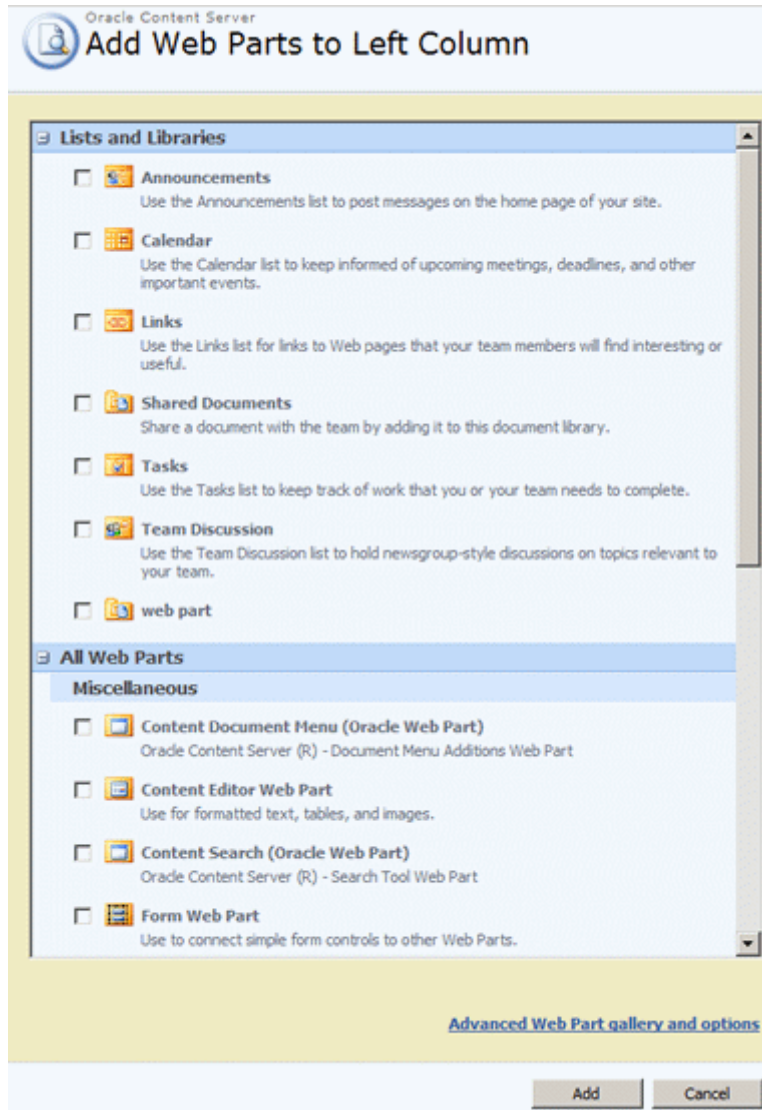
To access this page as an administrator, select **Edit Page** from the **Site Actions** menu in the Page Header.

To access this page as a non-administrative user, click **Personalize this Page** from the "Welcome *username*" menu above the Page Header.



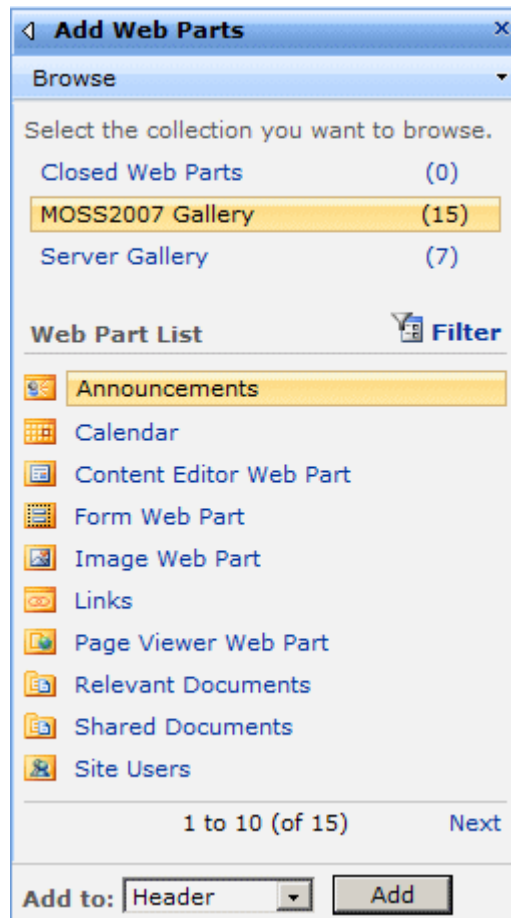
4.2.5 Add Web Parts Options Screen (Admin Only)

The Add Web Parts options screen is used to add web parts to a section of the Web Pages page. The available options depend on which section is modified: Header, Left Column, Body. Scroll through the options list to view all options. To access this list, select **Add A Web Part** above the section to be modified.



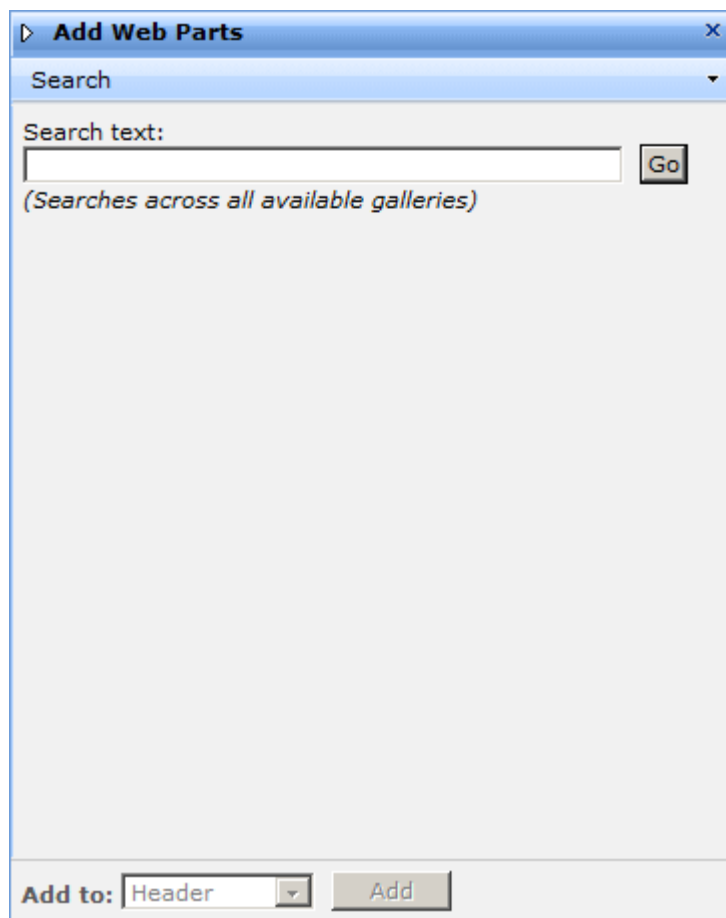
4.2.6 Add Web Parts (Browse) Screen (Admin Only)

The Add Web Parts (Browse) Screen is used to browse existing galleries for web parts to include on your page. To access this screen, click **Edit Page** on the [Site Actions Menu](#). Click **Add a Web Part** above the section to be modified, then click **Browse** in the [Add/Edit Web Parts Screen](#).



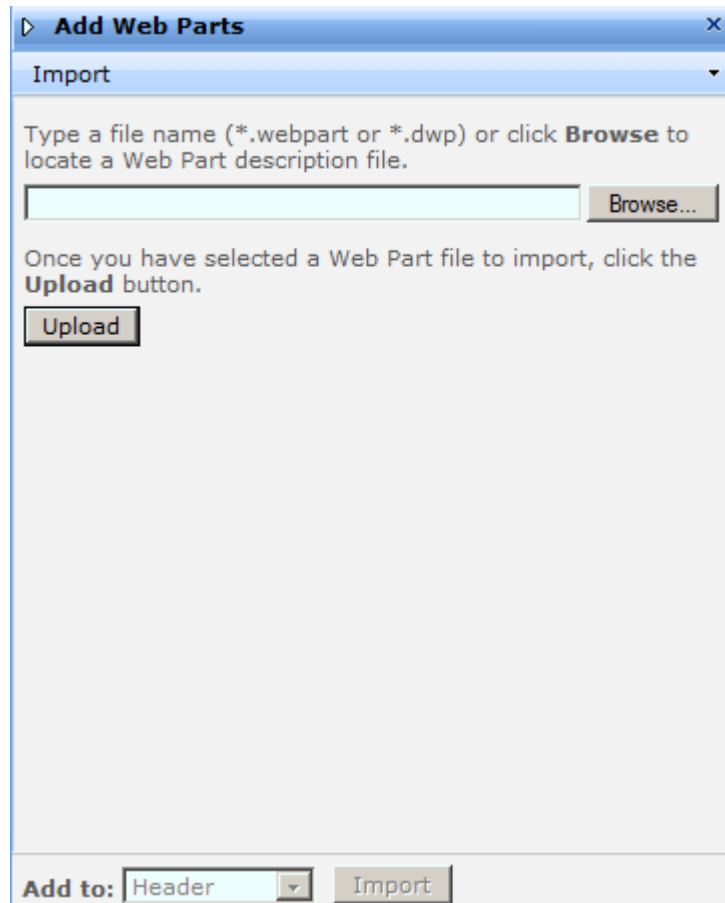
4.2.7 Add Web Parts (Search) Screen (Admin Only)

The Add Web Parts (Search) Screen is used to find web parts to include on your page by using a keyword search. To access this screen, click **Edit Page** on the [Site Actions Menu](#). Click **Add a Web Part** above the section to be modified, then click **Search** in the [Add Web Parts \(Search\) Screen \(Admin Only\)](#).



4.2.8 Add Web Parts (Import) Screen (Admin Only)

The Add Web Parts (Import) Screen is used to add new web parts on your page. To access this screen, click **Edit Page** on the [Site Actions Menu](#). Click **Add a Web Part** above the section to be modified, then click **Import** in the [Add Web Parts \(Import\) Screen \(Admin Only\)](#).



4.2.9 Change Page Title Screen (Admin Only)

The Change Page Title Screen is used to change the title bar information at the top of the Web Parts product page. To access this screen, click **Edit Parts** on the [Site Actions Menu](#) then click **Edit Title Bar Properties** in the Page Header.

Web Part Page Title Bar

Title
Oracle Content Management.aspx

Caption

Description

Image Link
To link to an image file, type a URL or path.
/_layouts/images/wpicon.gif

OK Cancel Apply

4.2.10 Change Navigation Tree Screen

The Change Navigation Tree Screen is used to change the information in the navigation portion of the Web Parts product page. To access this screen, click **Edit Page** in the [Site Actions Menu](#). Click **edit** in the header bar for the Navigation Tree (Oracle Web Part) section, then select **Modify Shared Web Part.** or **Modify My Web Parts.**

The Change Navigation Tree screen contains three parts: Appearance settings (expanded by default), Layout, and Advanced.

If the Navigation Title has been previously changed, that title appears on the menu in place of **Navigation Tree (Oracle Web Part)**. In addition, if you checked **Hidden** on the Layout portion for the section, **(Hidden)** appears in front of the title.

Navigation Tree (Oracle Web Part)

Appearance

Title

Height
 Should the Web Part have a fixed height?
 Yes Pixels
 No. Adjust height to fit zone.

Width
 Should the Web Part have a fixed width?
 Yes Pixels
 No. Adjust width to fit zone.

Chrome State
 Minimized
 Normal

Chrome Type

Layout

Advanced

OK Cancel Apply

4.2.11 Change Search Criteria Screen

The Change Search Criteria Screen is used to change the information in the Search criteria section of the Web Parts product page. To access this screen, click **Edit Page** from the [Site Actions Menu](#). Click **edit** in the header bar for the Content Search (Oracle Web Part) section, then select **Modify Shared Web Part** or **Modify My Web Parts**.

If the Web Part Content Search Title has been previously changed, that title appears on the menu in place of **Content Search (Oracle Web Part)**. In addition, if you checked **Hidden** on the Layout portion for the section, **(Hidden)** appears in front of the title.

Content Search (Oracle Web Part)

Appearance

Title
Content Search (Oracle Web Part)

Height
Should the Web Part have a fixed height?
 Yes Pixels
 No. Adjust height to fit zone.

Width
Should the Web Part have a fixed width?
 Yes Pixels
 No. Adjust width to fit zone.

Chrome State
 Minimized
 Normal

Chrome Type
Default

Layout

Advanced

WSS Data

OK Cancel Apply

4.2.12 Change Search Results Screen

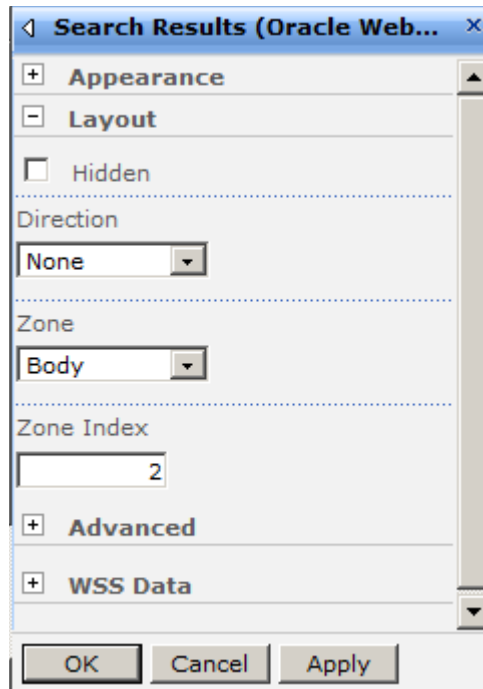
The Change Search Result Screen is used to change the information in the Search Result section of the Web Parts product page. To access this screen, click **Modify Shared Web Parts** or **Modify My Web Parts** from the [Site Actions Menu](#). Click **edit** in the header bar for **Search Results (Oracle Web Parts)**.

If the Web Part Search Results Title has been previously changed, that title appears on the menu in place of **Search Results (Oracle Web Part)**. In addition, if you checked **Hidden** on the Layout portion for the section, **(Hidden)** appears in front of the title.

The screenshot shows a configuration dialog box titled "Search Results (Oracle Web Part)". The "Appearance" tab is selected and expanded. The "Title" field contains "Search Results (Oracle Web Part)". Under the "Height" section, the question "Should the Web Part have a fixed height?" is followed by two radio button options: "Yes" (with an empty text box and a "Pixels" dropdown) and "No. Adjust height to fit zone." (which is selected). The "Width" section has a similar structure with "Should the Web Part have a fixed width?" and "No. Adjust width to fit zone." selected. The "Chrome State" section has "Normal" selected over "Minimized". The "Chrome Type" dropdown is set to "Default". Below the "Appearance" tab are three collapsed tabs: "Layout", "Advanced", and "WSS Data". At the bottom are "OK", "Cancel", and "Apply" buttons.

4.2.13 Layout Settings Screen

The Layout settings for any of the Change Web Part screens is used to set the layout of elements on the web part page. To access Layout settings, click the Maximize button (+) next to **Layout** in the edit screen for the section of the web parts page to be modified.



4.2.14 Advanced Settings Screen

The Advanced settings for any of the Change Web Part screens is used to set the layout of elements on the web part page. To access Advanced settings, click the Maximize button (+) next to **Advanced** in the edit screen for the section of the web parts page to be modified.

Search Results (Oracle Web Part)

Advanced

Allow Minimize

Allow Close

Allow Hide

Allow Zone Change

Allow Connections

Allow Editing in Personal View

Export Mode

Export all data

Title URL

Description

Oracle Content Server (R) - Search Results List We

Help URL

/WebApp/MembersOnly/Help/webparts/wh_start.ht

Help Mode

Modeless

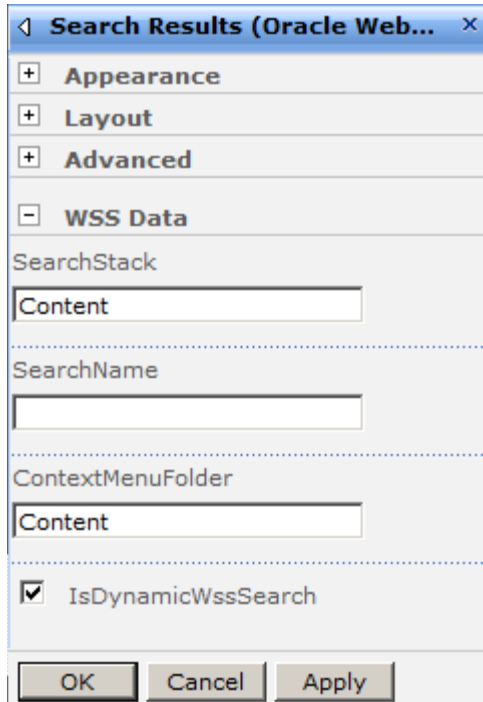
Catalog Icon Image URL

Title Icon Image URL

OK Cancel Apply

4.2.15 WSS Data Settings Screen

The WSS Data settings for a Change Web Part screen is used to alter WSS data criteria. To access WSS Data settings, click the Maximize button (+) next to **WSS Data** in the edit screen for the section of the web parts page to be modified.



4.2.16 Create Screen (Admin Only)

The Create screen provides access to numerous administrative functions, including creating a new Web Parts Page. To access this page, click **Site Actions**, then click **Create**. To create a new Web Parts Page, in the Web Pages column click **Web Part Page**.

For more information refer to "[Creating a Web Part Page \(Admin Only\)](#)" on page 4-10.



4.2.17 New Web Part Page Screen (Admin Only)

The New Web Part Page screen is used to specify the name, layout, and document location for a new Web Parts Page. To access this page, click **Site Actions**, then click **Create**. In the Web Pages column click **Web Part Page**.

For more information refer to "Creating a Web Part Page (Admin Only)" on page 4-10.

MOSS2007 > Oracle Content Server > Create > New Web Part Page

New Web Part Page

A Web Part Page is a collection of Web Parts that combines list data, timely information, or useful graphics into a dynamic Web page. The layout and content of a Web Part Page can be set for all users and optionally personalized by each user.


Name
Type a file name for your Web Part Page. The file name appears in headings and links throughout the site.

Name: .aspx
 Overwrite if file already exists?

Layout
Select a layout template to arrange Web Parts in zones on the page. Multiple Web Parts can be added to each zone. Specific zones allow Web Parts to be stacked in a horizontal or vertical direction, which is illustrated by differently colored Web Parts. If you do not add a Web Part to a zone, the zone collapses (unless it has a fixed width) and the other zones expand to fill unused space when you browse the Web Part Page.

Choose a Layout Template:

- Full Page, Vertical
- Header, Left Column, Body
- Header, Right Column, Body
- Header, Footer, 3 Columns
- Header, Footer, 2 Columns, 4 Rows
- Header, Footer, 4 Columns, Top Row
- Left Column, Header, Footer, Top Row, 3 Columns
- Right Column, Header, Footer, Top Row, 3 Columns



Save Location
Select the document library where you want the Web Part Page to be saved.

Document Library

Administering the Software

This section covers the following topics:

Concepts

- ["Administration Options"](#) on page 5-1
- ["Other Admin-Only Functionality"](#) on page 5-2
- ["Troubleshooting"](#) on page 5-3

Tasks

- ["Automatic User Logging"](#) on page 5-3

Interface

- ["Main Admin Screen"](#) on page 5-4

5.1 Administration Options

The Administration option on the [Main Navigation Tree](#) is used to configure system specific elements of the Web Parts product.

When you click this option, the [Main Admin Screen](#) is displayed. This Administration Screen is divided into three general categories:

- [Default User Setting](#)
- [Standard Information](#)
- [Diagnostic Information](#)

To access this screen, log in as an administrator. Select **Administration** from the [Main Navigation Tree](#). The [Main Admin Screen](#) is displayed.

After making edits, click **Save** to save your changes. Click **Reset** to clear your changes and reinstate the previously saved configuration. Click **Reset WSS** cache to clear the Web Support Server cache directory but leave all other configuration unchanged.

5.1.1 Default User Setting

You can set a default for users that is applicable for all web pages designed using the Web Parts product. **Content Page Row Count** sets the default size for the number of rows used when returning search results.

5.1.2 Standard Information

The following options can be set to determine how the Content Server is used by others at your site:

- Paged Resource Retriever - Used Saved Column Widths: If checked, uses saved width for additional resource.
- Session Timeout (minutes): Sets the number of minutes until the system times out after inactivity.
- Content Server - End Point Socket: Sets the address of the end point socket.
- Content Server - Trusted System User Name: Sets the administrator's login name.
- Content Server - Use Sockets: Sets how many sockets to use.
- Content Server - Web Service Connection URL: Sets the URL for the web service.
- Stellent.Scs.WebServiceSupport.SystemUserName: Sets the administrator's name for WSS.
- Stellent.Scs.WebServiceSupport.UseProxy: If set to true, proxies are used. If set to false, proxies are not used.
- StellentConterServer.WebServiceConnectionPort: Sets the port number for the Web Service connection.
- WebSupportServer.DefaultUserSetting.WSS.Logs.PageRowCount: Sets the number of rows on a WSS log file.
- Web Support Server.Session.Store.GlobalCacheTimeoutMinutes: Sets the number of minutes until the cache times out after inactivity.

5.1.3 Diagnostic Information

The following diagnostic information can be edited on this screen:

- Trace all available reporting points: If checked, all reporting points will be added to log files.
- Trace Key Points: If checked, key or main entry points into WSS are added to the log files.
- Use console output: If checked, console output will be added to log files.

5.2 Other Admin-Only Functionality

Several menu options are available only to those users who have administrative privileges. These include:

- Administration: Clicking this displays the [Main Admin Screen](#) where administrators can set WSS information, defaults, and content server information. See "[Administration Options](#)" on page 5-1 for details.
- Content Server Users: Clicking this node option displays a list of users in the Search Results pane who are assigned Content Server accounts and their email addresses.
- External Mapped Users: Clicking this node option displays a list of users in the Search Results pane who have been externally mapped to use the SharePoint server. The list displays the source name of the user and the target name.

- **Search Form Definitions:** Clicking this node option displays a list of search forms in the Search Results pane. The list displays the name of the search form and the fields used as search criteria. For more details about creating search forms, see "[Choosing a Page to Customize \(Admin Only\)](#)" on page 4-2.

5.3 Troubleshooting

You can use configuration file changes to troubleshoot the performance of the Web Parts product system.

5.3.1 Automatic User Logging

It may be useful to turn logging on when a person with a particular user name logs in to WSS (for example, if that user is experiencing intermittent problems that can't be reproduced reliably).

To do this, modify the UserLogDefinitions section of the WSS configuration file. The following sample code illustrates the changes you can make:

```
<!--User Log Definitions: Used to determine which users should be logged even if
the logging is off. To log a user's activity when they in even if logging is off,
add the user's name here. The compare is case-insensitive-->
<UserLogDefinitions>
  <Items>
    <clear />
    <!-- Name must be unique across all names -->
    <add Name='sysadmin' />
  </Items>
</UserLogDefinitions>
```

5.4 Administration Interface

The following screen is used by administrators to manage the Web Parts product product:

- [Main Admin Screen](#)

5.4.1 Main Admin Screen

The Main Admin screen is used to set defaults and alter directory paths. To access this screen, click **Administration** from the [Main Navigation Tree](#).

Administration Options	
Default User Setting	
Page Row Count - Content	<input type="text" value="10"/>
Standard	
Paged Resource Retriever - Used Saved Column Widths	<input checked="" type="checkbox"/>
Session Timeout (minutes)	<input type="text" value="20"/>
Stellent Content Server - End Point Socket	<input type="text" value="4444"/>
Stellent Content Server - Trusted System User Name	<input type="text" value="sysadmin"/>
Stellent Content Server - Use Sockets	<input type="text" value="1"/>
Stellent Content Server - Web Service Connection URL	<input type="text" value="http://cs10g-doc/idc/idcplg"/>
Stellent.Scs.WebServiceSupport.SystemUserName	<input type="text" value="sysadmin"/>
Stellent.Scs.WebServiceSupport.UseProxy	<input type="text" value="true"/>
StellentContentServer.WebServiceConnectionPort	<input type="text" value="80"/>
WebSupportServer.DefaultUserSetting.WSS.Logs.PageRowCount	<input type="text" value="50"/>
WebSupportServer.SessionStore.GlobalCacheTimeoutMinutes	<input type="text" value="480"/>
Diagnostics	
Trace all available reporting points	<input checked="" type="checkbox"/>
Trace Key Points	<input checked="" type="checkbox"/>
Use console output	<input type="checkbox"/>

Modifying Configuration Settings

Many configuration tasks can be accomplished using the interface provided and described in [Chapter 4, "Customizing the Software"](#). This appendix describes other configuration options that can be performed by altering configuration files.

Caution: Do not alter portions of the configuration file that are not documented here. Altering the wrong portion can have unforeseen consequences.

This section covers the following topics:

- ["Using the WSS Config Editor"](#) on page A-1
- ["The Web Config File"](#) on page A-2
- ["The WebSupportServer.exe.config file"](#) on page A-4

It is strongly recommended that you use the WSS Config Editor to edit any configuration parameters for the system.

A.1 Using the WSS Config Editor

The WSS Config editor can be used to change configuration information for your system. The editor is located (by default) at:

```
c:\Program Files\Oracle\WSS\WSSConfigEditor.exe
```

To use the editor, click the file name. The Config Editor screen is displayed. Six tabs indicate screens of information containing configuration details that can be changed. All configuration options are represented by name-value pairs. To change a setting, right click on the setting and select **Edit** to change the value.

The Settings tab contains configuration settings that are specific to the Web Support Server. The last item in the Settings list is the encrypted password for the system.

The remainder of this chapter discusses the settings that can be changed. Many settings can be changed using the configuration editor, and when possible that tool should be used. However, not all functionality can be changed with the WSS Config Editor. Some configuration settings, such as mapped users, must be manually changed in configuration files.

See the ["Configuration Interface Screens"](#) on page A-9 for screen shots of the WSS Config Editor configuration screens that can be used to change configuration settings.

A.2 The Web Config File

The Web.Config file is used to configure Oracle Web Application functionality. This file is typically installed in the `c:\Inetput\wwwroot\WebApp` directory.

This section describes settings in the top-level WebApp Web.Config file. Each portion of the file is described by an XSLT 'path' to the section with a brief description of the content. Example snippets are also provided for each portion. **Portions of this file that are not listed here should not be modified.**

This section describes the following portions of the Web.Config file:

- [EmailFromName](#)
- [EmailServerName](#)
- [ErrorEmailRecipients](#)
- [DiagnosticSetting.Logging](#)
- [DiagnosticSetting.Timer](#)
- [DefaultUserTheme](#)

A.2.1 EmailFromName

This setting configures the FROM email address and optional name from which diagnostic web server emails are sent.

XML Path: `//configuration/appSettings/add[@key="EmailFromName"]`

The value can be in one of two formats:

- If specifying only the email address, use the email address:
`"first.last@mycompany.com"`
- If using a specific name and an email address, use the following format:
`value=""From Name" <first.last@mycompany.com>";`

Example:

```
<configuration xmlns="http://schemas.microsoft.com/.NetConfiguration/v2.0">
  <appSettings>
    <add key="EmailFromName" value="&quot;WebApp System Monitor&quot;
      &lt;some.name@somecompany.com&gt;"; />
    ...
  </appSettings>
</configuration>
```

A.2.2 EmailServerName

This setting configures the outgoing email (SMTP) server to use when sending diagnostic web server emails. The EmailFromName must be an authorized sender on that server.

XML Path: `//configuration/appSettings/add[@key="EmailServerName"]`

Example:

```
<configuration xmlns="http://schemas.microsoft.com/.NetConfiguration/v2.0">
  <appSettings>
    <add key="EmailServerName" value="smtp.someserver.com" />
    ...
  </appSettings>
</configuration>
```

A.2.3 ErrorEmailRecipients

This setting configures the TO email address(es) and optional name(s) to which diagnostic web server emails will be sent.

XML Path: //configuration/appSettings/add[@key="ErrorEmailRecipients"]

Separate values using commas (,) or semicolons (;). Values can be in one of two formats:

- If specifying only the email address, use the email address:
"first.last@mycompany.com"
- If using a specific name and an email address, use the following format:
value=""To Name" <first.last@mycompany.com>";

Example:

```
<configuration xmlns="http://schemas.microsoft.com/.NetConfiguration/v2.0">
  <appSettings>
    <add key="ErrorEmailRecipients" value="first.recipient@somecompany.com,
      &quot;Second Recipient&quot; &lt;second.recipient@somecompany.com&gt;" />
    ...
  </appSettings>
</configuration>
```

A.2.4 DiagnosticSetting.Logging

This setting enables / disables all event logging for the WebApp web server. If this is set to off, the DiagnosticSetting.Timer setting is ignored. If set to on, error dumps are output to the Application Event Log with the Source name of WebApp.

XML Path: //configuration/appSettings/add[@key="DiagnosticSetting.Logging"]

Setting a value to 1 enables logging. Setting to 0 disables all logging.

Example:

```
<configuration xmlns="http://schemas.microsoft.com/.NetConfiguration/v2.0">
  <appSettings>
    <add key="DiagnosticSetting.Logging" value="1" />
    ...
  </appSettings>
</configuration>
```

A.2.5 DiagnosticSetting.Timer

This setting enables or disables diagnostic timings logging for the WebApp web server. If enabled, timings are output to the WebApp.Timings Event Log with source names related to web server operations, and time settings (HH:MM:SS.mmm) of actions (such as "WSS Call", "[Client] Download", etc) in the descriptions.

XML Path: //configuration/appSettings/add[@key="DiagnosticSetting.Timer"]

Setting a value to 1 enables timing logging. Setting to 0 disables the logging.

Example:

```
<configuration xmlns="http://schemas.microsoft.com/.NetConfiguration/v2.0">
  <appSettings>
    <add key="DiagnosticSetting.Timer" value="0" />
    ...
  </appSettings>
</configuration>
```

A.2.6 DefaultUserTheme

This setting controls which theme will be shown to users by default when logging into the main WebApp portal. Themes may be hard-coded for items served in other contexts such as Content Server Web Parts that use the SharePoint theme. The theme name maps to a directory name under the WebApp install directory, which is typically stored at `c:\Inetpub\wwwroot\WebApp\Styles\[Theme Name]`.

XML Path: //configuration/appSettings/add[@key="DefaultUserTheme"]

Example:

```
<configuration xmlns="http://schemas.microsoft.com/.NetConfiguration/v2.0">
  <appSettings>
    <add key="DefaultUserTheme" value="Outlook" />
    ...
  </appSettings>
</configuration>
```

A.3 The WebSupportServer.exe.config file

The WebSupportServer.exe.config file is used to configure elements such as the user names, navigation tree, and the search stack. This file is typically installed in the `c:\Program Files\Stellent\WSS`.

Each portion of the file is described by an XSLT 'path' to the section with a brief description of the content. Example snippets are also provided for each portion.

Portions of this file that are not listed here should not be modified.

This section describes the following portions of the WebSupportServer.exe.config file:

- [Mapped Users](#)
- [Profile Proxies Users](#)
- [Activation Stack](#)
- [Navigation Tree Content](#)
- [Search Stack Definitions](#)
- [User Log Definitions](#)
- [App Settings](#)

A.3.1 Mapped Users

This setting lists all users who are mapped from external users to Content Server users.

XML Path: \configuration\ContentServer\SCSMappedUsers\Users

Example:

```
<SCSMappedUsers>
  <Users>
    <clear />
    <add SourceName="ABSCSWP2\Administrator" TargetName="sysadmin"
      Password="idc" />
  </Users>
</SCSMappedUsers>
```

A.3.2 Profile Proxies Users

This setting lists all Search Forms defined by the administrator. This has several example forms initially. If not needed, they can be removed and replaced with custom versions.

XML Path: \configuration\ContentServer\SCSProfileProxies\Profiles

Example:

```
<SCSProfileProxies>
  <Profiles>
    <clear />
    <add ProfileName="AllFields" DisplayName="All Fields" FieldList="*" />
    <add ProfileName="DocTitle" DisplayName="By Title" FieldList="dDocTitle" />
    <add ProfileName="Author" DisplayName="By Author" FieldList="dDocAuthor" />
    <add ProfileName="AuthorAndTitle" DisplayName="By Author and Title"
      FieldList="dDocAuthor,dDocTitle" />
  </Profiles>
</SCSProfileProxies>
```

A.3.3 Activation Stack

This setting describes which object will be used in the activation of a WSS session. The example shows the mapped user feature commented out by using the `<!-- -->` XML comment.

Important: Do not remove the "Web Support Server - Session Initialization" or the "Content Server User Validation" elements. They are needed to create a WSS session and verify the user's Content Server roles.

XML Path: \configuration\WebSupportServer\ActivationProviderStack

Example:

```
<ActivationProviderStack>
  <SynchronousItems>
    <clear />
    <!-- add Name="Content Server User Map"
ActivationProviderType="Stellent.Wss.Scs.ActivationProviders.SCSMappedUser
Provider,Stellent.Wss.Scs" / -->
    <add Name="Web Support Server - Session Initialization"
ActivationProviderType="Stellent.IPM.Web.WebSupportServerObjects.
ActivationProviders.WebSupportSessionIdProvider,WebSupportServerObjects"
Configuration="WebSupportUserName=IPMUserName;WSS_AdminRoleName=WebAdmin" />
    <add Name="Content Server User Validation"
ActivationProviderType="Stellent.Wss.Scs.ActivationProviders.SCSActivation
Provider,Stellent.Wss.Scs" />
  </SynchronousItems>
  <AsynchronousItems>
    <clear />
  </AsynchronousItems>
  <ChangePasswordItems>
    <clear />
  </ChangePasswordItems>
</ActivationProviderStack>
```

A.3.4 Navigation Tree Content

This setting determines which nodes are loaded into the navigation tree web part. Customization could include removing tree items or changing the required roles to determine the existence of the elements. The example section here contains only the SavedQueries nav tree node.

XML Path:

```
\configuration\WebSupportServer\NavTreeDefinitions\Items
```

Example:

```
<NavTreeDefinitions>
  <Items>
    <clear />
    <add Name="SavedQueries"
      NavTreeType="Stellent.Wss.Scs.NavigationTree.SCSNavTreeSavedSearches,
      Stellent.Wss.Scs" />
  </Items>
</NavTreeDefinitions>
```

A.3.5 Search Stack Definitions

The search stack defines where WSS will obtain data for presentation to users. Most of these items should not be altered or removed. However, some items specify `Stellent.IPM.Web.WebSupportServerObjects.FolderFilters.FilterAndOrderFields` as a value for `ResultsListPageFilterType`. This defines the column content of the search results and the order of those columns.

To change the column set and search results order, alter the `ResultsListPageFilterConfig` attribute which has a setting value of `ColumnList`. The column list contains the names of the columns to include in the search results. For example, the standard Content Server search results use a column list of the form:

```
"ColumnList=dDocTitle,dDocAuthor,dSecurityGroup,dDocName"
```

which specifies the names of the columns to show.

Additionally, if `ResultsListPageFilterConfig` has a setting value of `UseOrder=1` the order of the columns specified by `ColumnList` are used.

XML Path:

```
\configuration\WebSupportServer\NavTreeDefinitions\Items
```

Example:

```
<SearchStackDefinitions>
  <Items>
    <clear />
    <add Name="Content.ProfileProxies"
      ResultsListSourceType="Stellent.Wss.Scs.ResultsListSources.SCSProfile
      ProxiesResultsList, Stellent.Wss.Scs"
      CreateResultsListWhenMissing="true"
      ResultsListPageFilterType="Stellent.IPM.Web.WebSupportServerObjects.Folder
      Filters.FilterAndOrderFields"
      ResultsListPageFilterConfig="ColumnList=DisplayName,FieldList;UseOrder=1" />
    <add Name="WSS.Logs"
      ResultsListSourceType="Stellent.IPM.Web.WebSupportServerObjects.
      ResultsListSources.WSSLogViewer"
      CreateResultsListWhenMissing="true" ResultsListPageFilterType=
      "Stellent.IPM.Web.WebSupportServerObjects.FolderFilters.FilterAndOrderFields"
      ResultsListPageFilterConfig="ColumnList=Msg,Time,
      Elapsed,ThreadId;UseOrder=1" />
    <add Name="Content" NameListSourceType="Stellent.Wss.Scs.NameListSources.
      SCSProfileNameListSource, Stellent.Wss.Scs" PromptsListSourceType=
      "Stellent.Wss.Scs.PromptListSource.SCSSearchFormPromptListSource,
      Stellent.Wss.Scs" ResultsListSourceType=
      "Stellent.Wss.Scs.ResultsListSources.SCSContentResultsListSource,
```



```

Stellent.Wss.Scs" ResultsListPageFilterType=
"Stellent.IPM.Web.WebSupportServerObjects.FolderFilters.
FilterAndOrderFields" ResultsListPageFilterConfig="ColumnList=
dDocTitle,dDocAuthor,dSecurityGroup,
dDocName;UseOrder=1" CreateResultsListWhenMissing="true" />
<add Name="Content.Subscriptions" NameListSourceType=
"Stellent.Wss.Scs.NameListSources.SCSSubscriptionsNls,Stellent.Wss.Scs"
PromptsListSourceType="Stellent.Wss.Scs.PromptListSource.SCSDetailsViewPls,
Stellent.Wss.Scs" ResultsListSourceType="Stellent.Wss.Scs.ResultsListSources.
SCSSubscriptionsResultsList,Stellent.Wss.Scs" ResultsListPageFilterType=
"Stellent.IPM.Web.WebSupportServerObjects.FolderFilters.FilterAndOrderFields"
ResultsListPageFilterConfig="ColumnList=dDocTitle;UseOrder=1"
CreateResultsListWhenMissing="true" />
<add Name="Content.CheckedOut"
NameListSourceType="Stellent.Wss.Scs.NameListSources.SCSCheckInsNls,
Stellent.Wss.Scs"
PromptsListSourceType="Stellent.Wss.Scs.PromptListSource.SCSDetailsViewPls,
Stellent.Wss.Scs"
ResultsListSourceType="Stellent.Wss.Scs.ResultsListSources.
SCSCheckInsResultsList,Stellent.Wss.Scs" ResultsListPageFilterType=
"Stellent.IPM.Web.WebSupportServerObjects.FolderFilters.FilterAndOrderFields"
ResultsListPageFilterConfig="ColumnList=dDocTitle,dCheckoutUser,dDocName;
UseOrder=1" CreateResultsListWhenMissing="true" />
<add Name="Content.MyWorkflow"
NameListSourceType="Stellent.Wss.Scs.NameListSources.SCSWorkflowNls,
Stellent.Wss.Scs"
PromptsListSourceType="Stellent.Wss.Scs.PromptListSource.SCSDetailsViewPls,
Stellent.Wss.Scs"
ResultsListSourceType=
"Stellent.Wss.Scs.ResultsListSources.SCSWorkflowResultsList,Stellent.Wss.Scs"
ResultsListPageFilterType="Stellent.IPM.Web.WebSupportServerObjects.
FolderFilters.FilterAndOrderFields"
ResultsListPageFilterConfig=
"ColumnList=dDocTitle,dDocName,wfQueueLastActionTs,wfQueueActionState,wfQueueEnterTs;
UseOrder=1" CreateResultsListWhenMissing="true" />
<add Name="Content.Users"
NameListSourceType="Stellent.Wss.Scs.NameListSources.SCSUserNls,
Stellent.Wss.Scs" PromptsListSourceType=
"Stellent.Wss.Scs.PromptListSource.SCSDetailsViewPls,Stellent.Wss.Scs"
ResultsListSourceType=
"Stellent.Wss.Scs.ResultsListSources.SCSUserNameResultsList,Stellent.Wss.Scs"
ResultsListPageFilterType=
"Stellent.IPM.Web.WebSupportServerObjects.FolderFilters.FilterAndOrderFields"
ResultsListPageFilterConfig="ColumnList=dName,dFullName,dEmail;UseOrder=1"
CreateResultsListWhenMissing="true" />
<add Name="Content.MappedUsers"
NameListSourceType="Stellent.Wss.Scs.NameListSources.SCSUserNls,
Stellent.Wss.Scs" PromptsListSourceType=
"Stellent.Wss.Scs.PromptListSource.SCSDetailsViewPls,Stellent.Wss.Scs"
ResultsListSourceType="Stellent.Wss.Scs.ResultsListSources.SCSUser
MapResultsList,Stellent.Wss.Scs" CreateResultsListWhenMissing="true" />
<add Name="Content.MyUrls"
ResultsListSourceType="Stellent.Wss.Scs.ResultsListSources.SCSPersonalUrlsResults
List,Stellent.Wss.Scs" CreateResultsListWhenMissing="true" />
<add Name="Content.ContributionFolders"
ResultsListSourceType="Stellent.Wss.Scs.ResultsListSources.
SCSContributionFolderResultsList,Stellent.Wss.Scs" ResultsListPageFilterType=
"Stellent.IPM.Web.WebSupportServerObjects.FolderFilters.FilterAndOrderFields"
ResultsListPageFilterConfig="ColumnList=
wssDisplayedName,dReleaseDate,dDocAuthor;

```

```

    UseOrder=1" CreateResultsListWhenMissing="true" />
<add Name="Content.DocumentRevisions"
    ResultsListSourceType="Stellent.Wss.Scs.ResultsListSources.
    SCSRevisionResultsList, Stellent.Wss.Scs" ResultsListPageFilterType=
    "Stellent.IPM.Web.WebSupportServerObjects.FolderFilters.FilterAndOrderFields"
    ResultsListPageFilterConfig="ColumnList=
    dStatus,dInDate,dOutDate,dStatus,dRevision
    ID;UseOrder=1" CreateResultsListWhenMissing="true" />
</Items>
</SearchStackDefinitions>

```

A.3.6 User Log Definitions

This setting lists the users that will have active logging. To activate WSS logging for a particular username, add that username to this list. The example causes the session logging to turn on for any user logged in as "sysadmin" or "RRogers".

XML Path:

```
\configuration\WebSupportServer\UserLogDefinitions\Items
```

Example:

```

<UserLogDefinitions>
  <Items>
    <clear />
    <!-- Name must be unique across all names -->
    <add Name="sysadmin"/>
    <add Name="RRogers"/>
  </Items>
</UserLogDefinitions>

```

A.3.7 App Settings

Several other AppSettings used by WSS and the Web Parts can be changed, including cache folder location, WSS session timeout, and Content Server port. The following example shows several of these configuration. The text in **bold font** indicates the pertinent section.

Example:

```

<appSettings>
<!-- The Cache folder used to cache global and user session data -->
  <add key="WebSupportServer.CacheDirectory" value=
  "C:\Program Files\Stellent\WSS\WebSupportServerCache" />

  <!-- Debug and Tracing - This turns logging on for all WSS Activity -->
  <add key="WebSupportServer.Trace" value="false" />
  <!-- Debug and Tracing - If logging is on this should be turned on -->
  <add key="WebSupportServer.UseConsole" value="false" />
  <!-- Debug and Tracing - This turns on logging for Entry points into WSS-->
  <add key="WebSupportServer.KeyPoints" value="false" />

  <!-- Session Infrastructure - This is the WSS Session timeout. Any session with
  no activity for this number of minutes is cleaned up on WSS -->
  <add key="WebSupportServer.SessionStore.SessionTimeoutMinutes" value="20" />

  <!-- Session Infrastructure - This is the WSS Global Cache timeout. After this
  number of minutes WSS will flush its cache causing any access of global cache to
  be refreshed. Things like Folder Structure in the Contribution folders or Field
  Definitions are cached at WSS for efficiency. -->
  <add key="WebSupportServer.SessionStore.GlobalCacheTimeoutMinutes" value="480" />

```

```

<!-- List Row Counts - These are the default row counts in the pages presented to
the user -->
<add key="WebSupportServer.DefaultUserSetting.Content.PageRowCount" value="10" />
<add key="WebSupportServer.DefaultUserSetting.WSS.Logs.PageRowCount" value="50" />

<!-- Stellent Content Server Settings - This is the URL to the Content Server web
services used by WSS -->
<add key="StellentContentServer.WebServiceConnectionUrl"
value="http://cos-jjumper/stellentcs/idcplg" />

<!-- Stellent Content Server Settings - This is the System user used for Web
Services User Proxy along with that password used for the user -->
<add key="Stellent.Scs.DirectServiceSupport.StellentRequest.Communication.
SystemUser" value="sysadmin" />
<add key="Stellent.Scs.WebServiceSupport.SystemUserName" value="sysadmin" />
<add key="Stellent.Scs.WebServiceSupport.SystemUserPassword" value="idc" />

<!-- Stellent Content Server Settings - This is the Content Server port used to
communicate through the socket layer to content server -->
<add key="Stellent.Scs.DirectServiceSupport.StellentRequest.Communication.
EndPoint" value="4444" />

<!--Stellent Content Server Settings - Use this setting to control whether WSS will
send the users Windows domain as part of the user name when requesting services
from Content Server. This is usually set to 'false', however, in environments
where Content Server security precludes the use of domain information, setting
this value to 'true' will cause WSS to strip the relevant domain information
before making Content Server requests -->
<add key="Stellent.Scs.WebServiceSupport.StripDomainFromUserName" value="false" />

```

A.3.8 Special App Setting

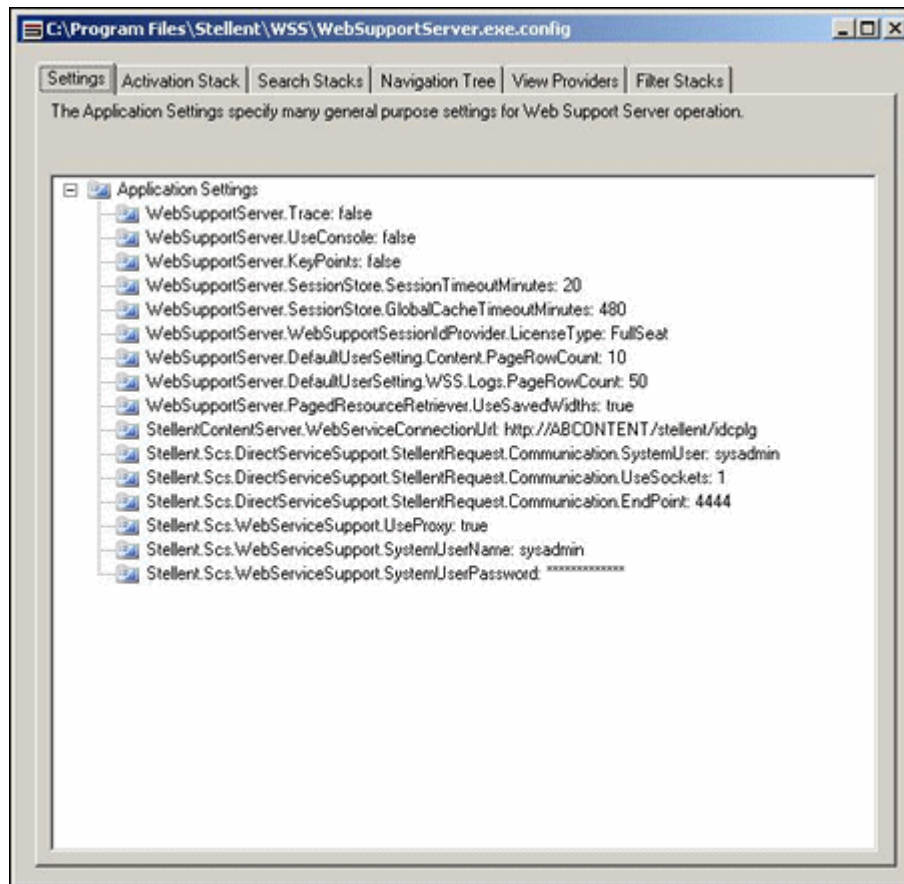
A new key was added to afford the administrator the opportunity to disable default behavior and NOT include active directory groups when mapping roles and accounts. This setting is located in the WEB.CONFIG file for the WebApp installation. A likely use for this option is when users might belong to Active directory groups that would map to roles and accounts inappropriate for your environment. Please refer to ["Changing the Web Configuration Setting"](#) on page B-4 for details about how to find this file and how changing this setting could affect your users' permissions.

A.4 Configuration Interface Screens

The following screens are used with the WSS Config Editor to configure the Web Parts product system:

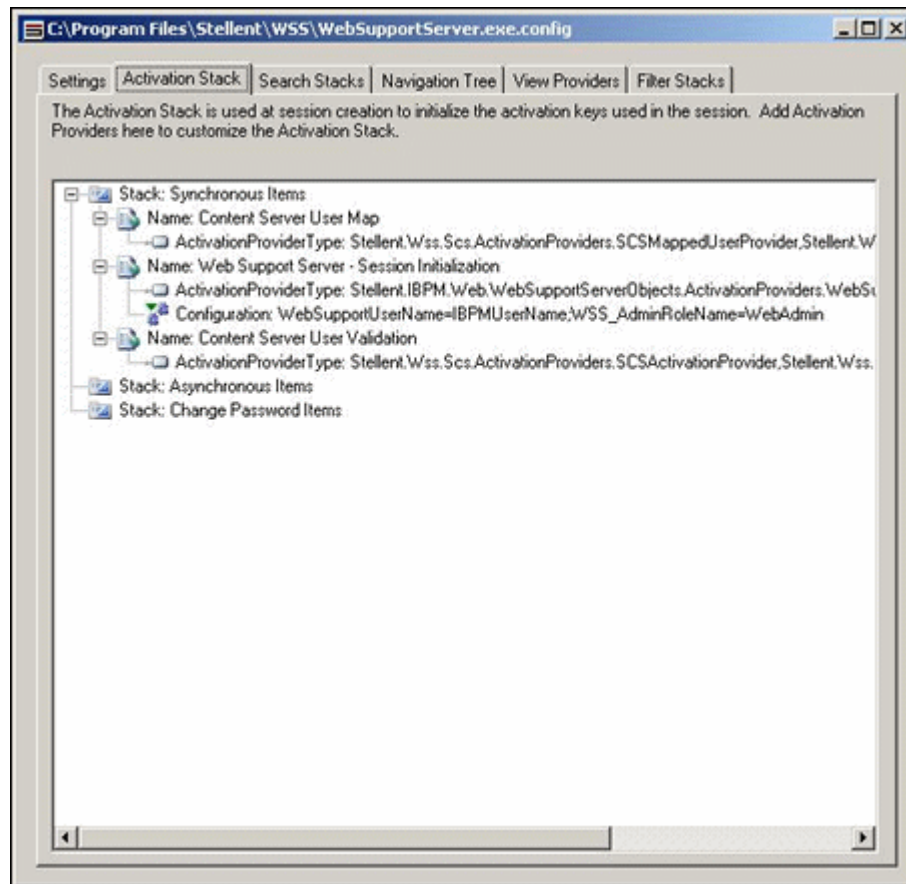
- [Application Settings Screen](#)
- [Activation Stack Screen](#)
- [Search Stack Screen](#)
- [Navigation Tree Screen](#)
- [View Providers Screen](#)
- [Filter Stacks Screen](#)

A.4.1 Application Settings Screen



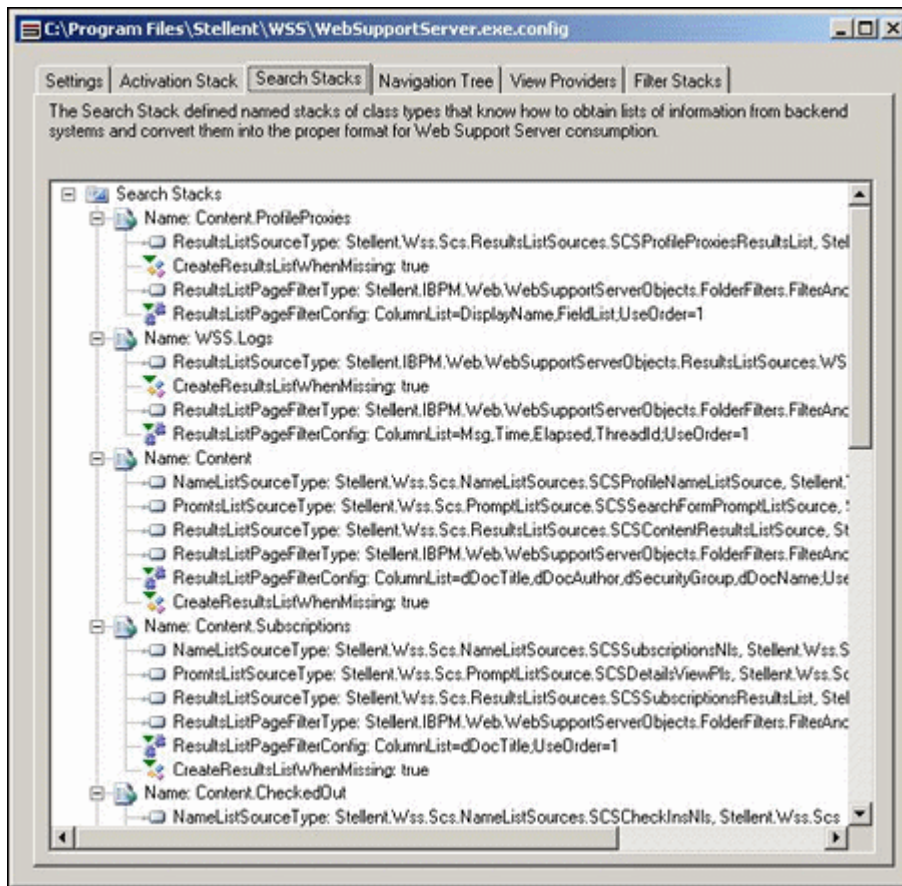
The Application Settings screen is used to change configuration values for the session timeout, the connection URL for the Content Server and other configuration for Web Support Server operation. To access this screen, click the **Settings** tab on the WSS Config Editor window.

A.4.2 Activation Stack Screen



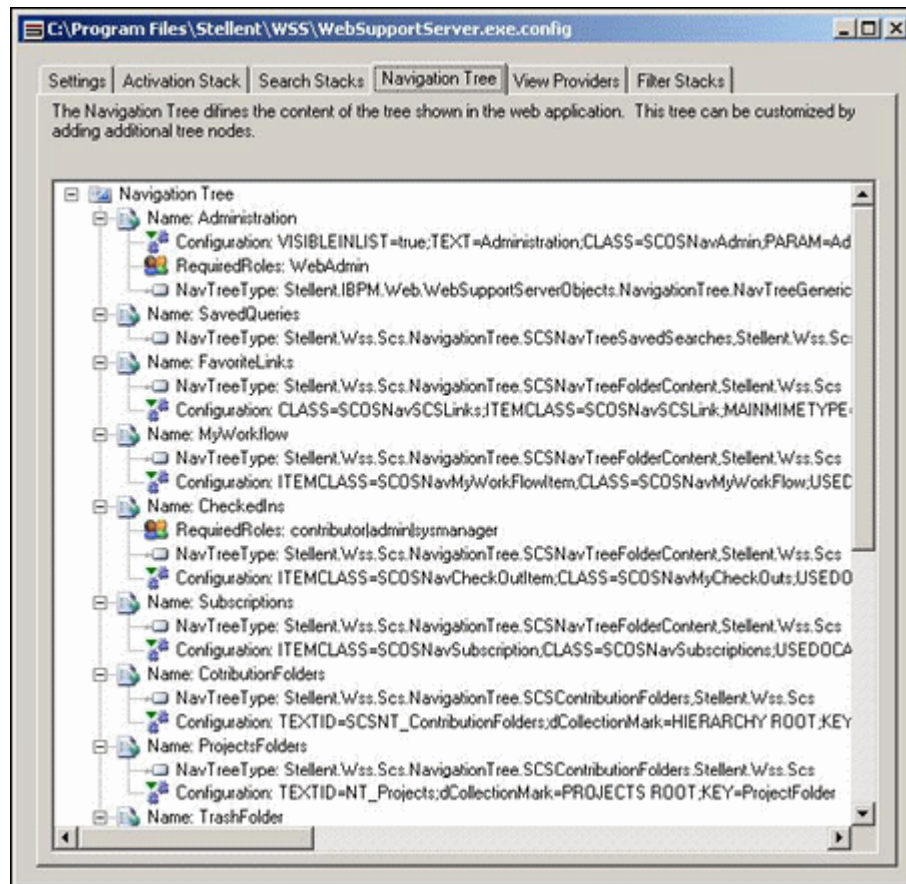
The Activation Stack screen is used to initialize the activation keys and customize the Activation Stack. To access this screen, click the **Activation Stack** tab on the WSS Config Editor window.

A.4.3 Search Stack Screen



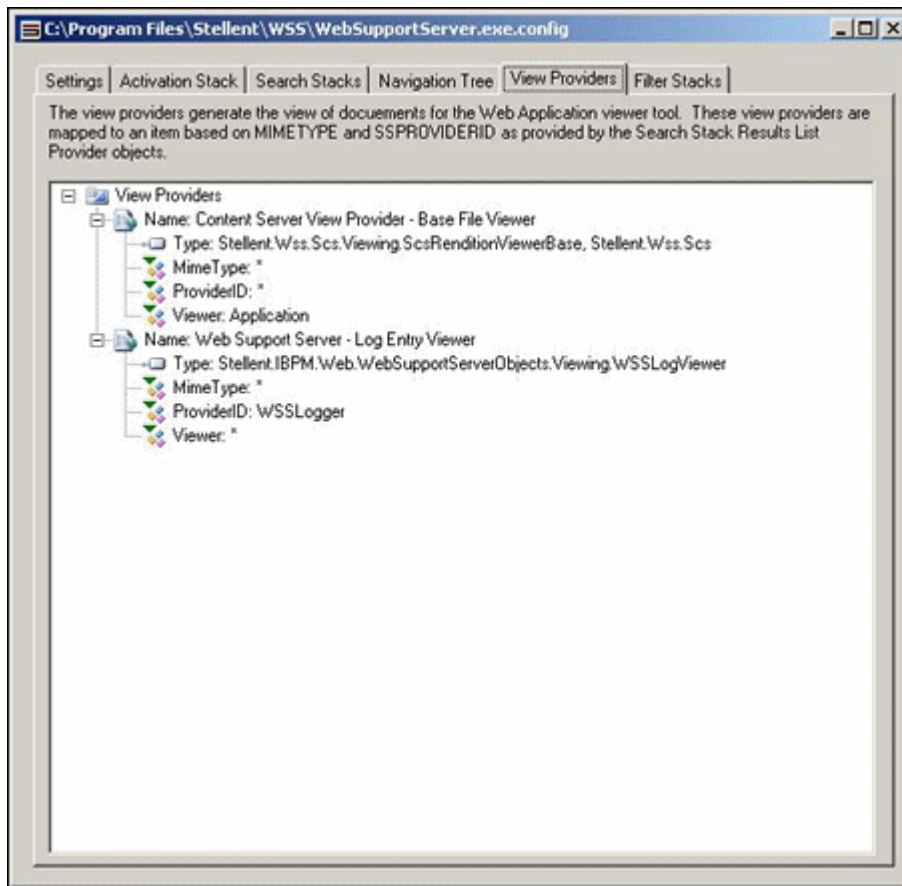
The Search Stack screen defines the named stacks of class types used to obtain information from the back end system. To access this screen, click the **Search Stack** tab on the WSS Config Editor window.

A.4.4 Navigation Tree Screen



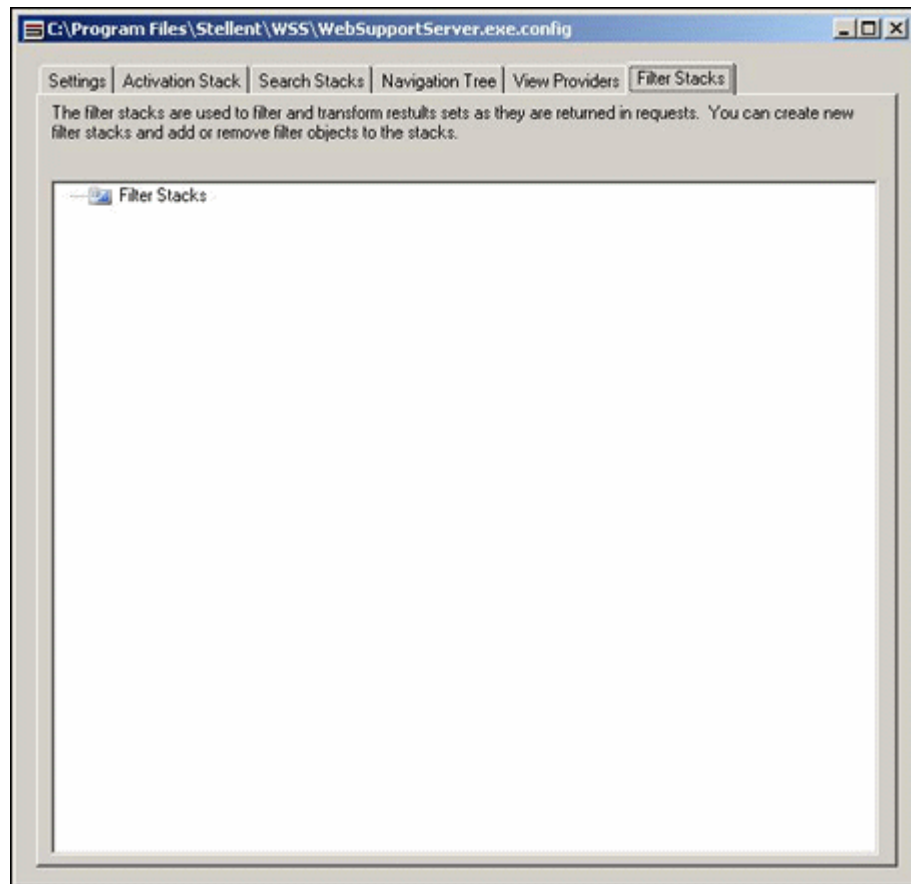
The Navigation Tree screen defines the content of the Navigation list shown in the web application. You can customize this tree by adding or removing nodes. To access this screen, click the **Navigation Tree** tab on the WSS Config Editor window.

A.4.5 View Providers Screen



The View Providers screen shows a list of providers that are mapped to items. To access this screen, click the **View Providers** tab on the WSS Config Editor window.

A.4.6 Filter Stacks Screen



The Filter Stacks screen filter and transform result sets as they are returned in requests. To access this screen, click the **Filter Stacks** tab on the WSS Config Editor window.

Security Considerations

This appendix includes descriptions of file access permissions and user identity roles specific to the operation of Oracle Content Server Web Parts. It is not intended for use as a description security use and protocols beyond the needs of this application.

This section covers the following topics:

- ["Verifying and Adding Windows Group Permissions"](#) on page B-1
- ["Settings for Content Server Security Integration"](#) on page B-4

B.1 Verifying and Adding Windows Group Permissions

After installing the Windows components as described in sections 2.1 through 2.3, you should verify and if necessary add the appropriate file access rights to the newly installed web application folder and the shared Web Support Server (WSS) folder. This is especially important if you are using Windows Server 2008 because the rights are not applied by the installer.

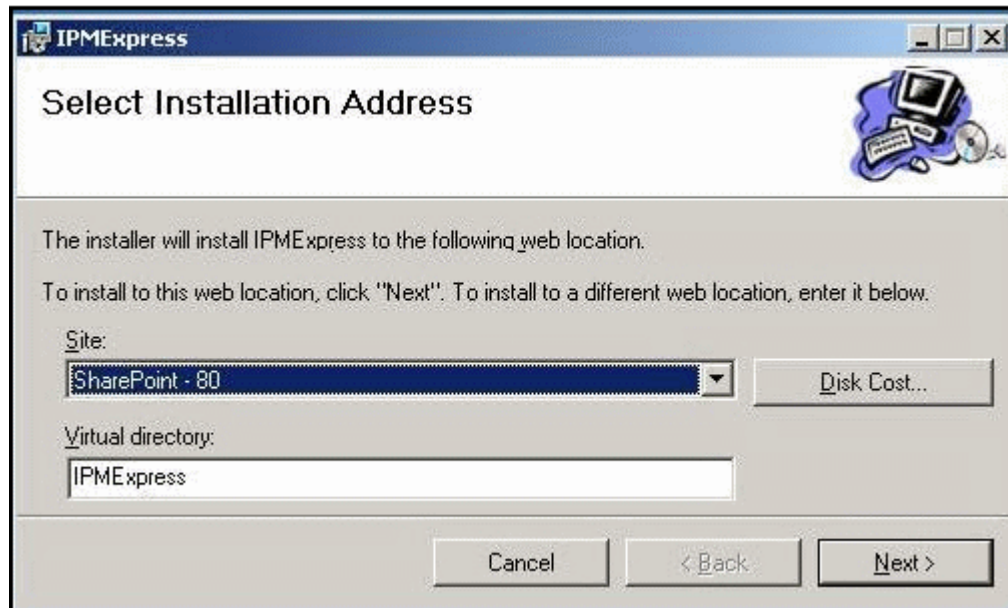
This section covers the following topics:

- ["Applying Access Permissions for Groups"](#) on page B-1
- ["Applying Access Rights to the WSS Share Location"](#) on page B-3

B.1.1 Applying Access Permissions for Groups

To add these access rights:

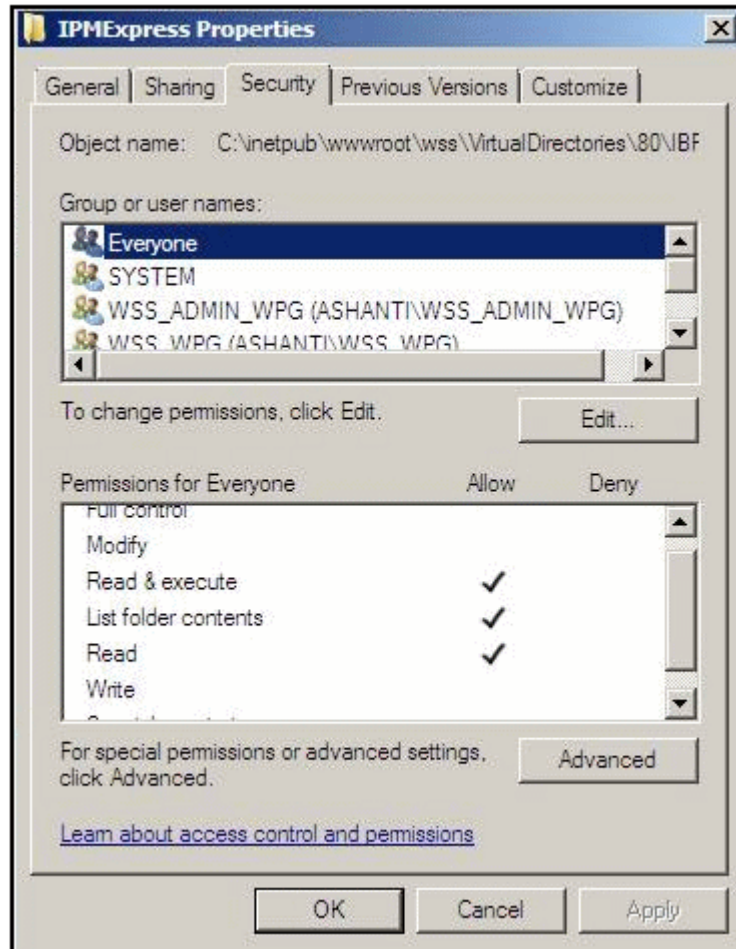
1. The path to the WebApp is based on the web application you specified during the setup procedure for ["Using the Installer"](#) on page 2-2 (shown in the graphic below).



Generally this location is:

C:\INETPUB\WWWROOT\WSS\VIRTUALDIRECTORIES\80

2. The folder used to select properties is named as specified during the installation. Typically the name is `IPMExpress`. Activate the properties dialog for the folder (using right click menu).
3. Using the security tab (shown in the graphic below), ensure the groups and users that will need access are given the following permissions:
 - Read & execute
 - List folder contents
 - Read

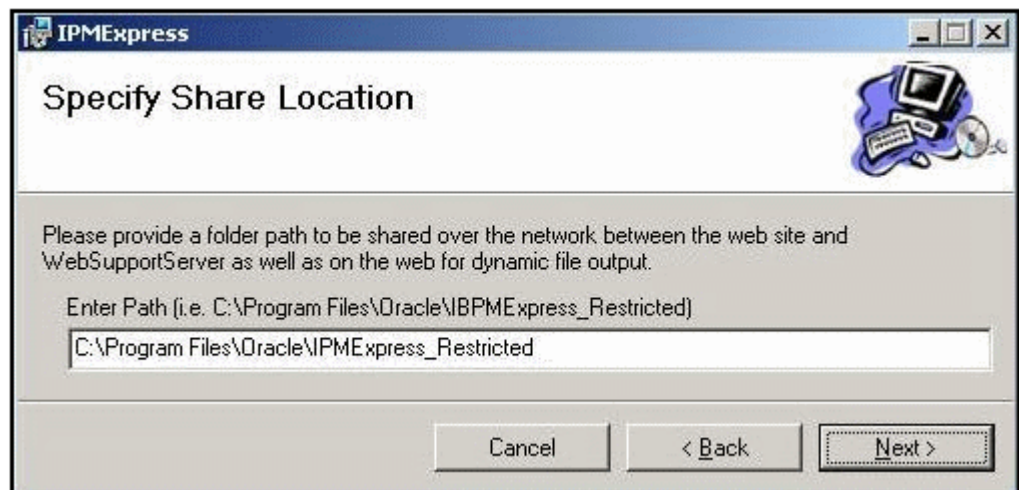


4. Apply these permissions to all files and subfolders.

B.1.2 Applying Access Rights to the WSS Share Location

To add these access rights:

1. Find the WSS 'Share Location' as specified during the installation process (shown in the graphic below).



2. As described in the process for [Applying Access Permissions for Groups](#), access the folder's security properties and give the appropriate users full control of this folder.

This share is used to temporarily store transaction data which must be created, read, updated, deleted and listed.

B.2 Settings for Content Server Security Integration

For fine grain control and better integration with Content Server security, administrators can modify configuration variable settings as follows:

- ["Changing the Web Configuration Setting"](#) on page B-4
- ["Removing the Domain Portion of User Names"](#) on page B-4

B.2.1 Changing the Web Configuration Setting

To change this setting:

1. This variable is in the WEB.CONFIG file contained in the WebApp folder (see ["Applying Access Permissions for Groups"](#) on page B-1 for the path information).
2. Locate the setting named:

```
Stellent.Scs.WebServiceSupport.UseExternalRolesAndAccounts
```

It is located in the XML file's <appSettings> section.

3. The default value of this setting is `true`. Change this value to `false`.

The user's Windows groups will not be included with their identity when accessing Content Server services.

A likely use for this option is when users might belong to Active directory groups that would map to roles and accounts inappropriate for your environment.

B.2.2 Removing the Domain Portion of User Names

When Content Server security is based on a provider that does not use domain information, such as when the LDAP provider is non-domain passed, and yet a match between the Windows domain user's domain-less user name is needed, the administrator is afforded the ability to remove the domain portion of the user name before WSS uses a Content Server service.

To change this setting:

1. Using the WSS Config Editor (see [Appendix A, "Modifying Configuration Settings"](#)), locate the setting named:

```
Stellent.Scs.WebServiceSupport.StripDomainFromUserName
```

The default setting is `false`.

2. Change the setting to `true`.

The change will only affect service calls between WSS and Content Server. The net effect is to allow Content Server to match names from non-domain security with Windows users.

Third Party Licenses

This appendix includes a description of the Third Party Licenses for all the third party products included with this product.

- "Apache Software License" on page C-1
- "W3C Software Notice and License" on page C-1
- "Zlib License" on page C-2
- "General BSD License" on page C-3
- "General MIT License" on page C-3
- "Unicode License" on page C-3
- "Miscellaneous Attributions" on page C-4

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```

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```
* zlib.h -- interface of the 'zlib' general purpose compression library version
1.2.3, July 18th, 2005
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