

Oracle Universal Content Management
Web Parts User Guide
10g Release 3 (10.1.3.3.0)

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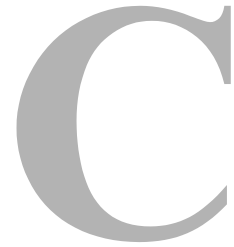
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INTRODUCTION

OVERVIEW

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

- ❖ [About This Guide](#) (page 1-1)
- ❖ [Product Overview](#) (page 1-2)
- ❖ [Conventions](#) (page 1-4)

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.

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

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.

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.
- ❖ **Logs:** Provides access to WSS logs. The WSS is a link between Content Server and SharePoint. See [Chapter 2 \(Installation and Configuration\)](#) for details.
- ❖ **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.

CONVENTIONS

The following conventions are used throughout this guide:

- ❖ The notation *<Install_Dir>/* is used to refer to the location on your system where the content server instance is installed.
- ❖ Forward slashes (/) are used to separate the directory levels in a path name. A forward slash will always appear after the end of a directory name.
- ❖ Notes, technical tips, important notices, and cautions use these conventions:

Symbols	Description
	This is a note. It is used to bring special attention to information.
	This is a technical tip. It is used to identify information that can be used to make your tasks easier.
	This is an important notice. It is used to identify a required step or required information.
	This is a caution. It is used to identify information that might cause loss of data or serious system problems.

INSTALLATION AND CONFIGURATION

OVERVIEW

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

Concepts

- ❖ [Installation Overview](#) (page 2-2)

Tasks

- ❖ [Using the Installer](#) (page 2-3)
- ❖ [Installing Additional Components](#) (page 2-4)
- ❖ [Adding Custom Fields to the Content Server](#) (page 2-7)
- ❖ [Adding Content Server to Your SharePoint System](#) (page 2-9)
- ❖ [Uninstalling the Software](#) (page 2-24)

Interface

- ❖ [Select Installation Address Screen](#) (page 2-11)
- ❖ [Specify Share Location Screen](#) (page 2-12)
- ❖ [Automated Web Site Emails Screen](#) (page 2-13)

- ❖ [Logging Options Screen](#) (page 2-14)
- ❖ [Select Sign On Support Screen](#) (page 2-15)
- ❖ [Select Installation Folder Screen](#) (page 2-16)
- ❖ [Specify URL Screen](#) (page 2-17)
- ❖ [Administrator Name Screen](#) (page 2-18)
- ❖ [SharePoint Main Screen](#) (page 2-19)
- ❖ [SharePoint Site Listing Screen](#) (page 2-20)
- ❖ [SharePoint Site Content Screen](#) (page 2-21)
- ❖ [SharePoint Create Page Screen](#) (page 2-22)
- ❖ [New Content Server Web Parts Page](#) (page 2-23)
- ❖ [New Page Screen](#) (page 2-24)

INSTALLATION OVERVIEW

the Web Parts product is installed using an Installer program on the SharePoint server. 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. The AJAX handlers are SharePoint server side objects that handle asynchronous requests from the browser. This allows client code to communicate with WSS through 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](#) (page 2-4) for details.

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

The Web Parts product can only be used with SharePoint Portal Server 2003 and Content Server version 7.5.2 and later.

USING THE INSTALLER

The installation process has three 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 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 a welcome screen is displayed.

2. Click **Next** to continue.

The [Select Installation Address Screen](#) (page 2-11) is displayed.

3. Enter the web location and the virtual directory. Click **Disk Cost** to view an estimate of the amount of space needed for the installation. Click **Next** to continue.

The [Specify Share Location Screen](#) (page 2-12) is displayed.

4. 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 Sever 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.

The [Automated Web Site Emails Screen](#) (page 2-13) is displayed.

5. Enter the email contact information for the person who will receive diagnostic messages. If left blank, no email is sent. Click **Next** to continue.

The [Logging Options Screen](#) (page 2-14) is displayed.

6. Choose the type of logging that will be done initially. Logging can be changed later by selecting an option from the Log menu. See [Troubleshooting](#) (page 5-4) for details. The default is **Enable Logging**. 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.

The [Select Sign On Support Screen](#) (page 2-15) is displayed.

7. Choose the type of sign-on support to be used. If **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.
8. Click **Next** to continue. Click **Next** again to begin the WebApp installation.

9. A message screen is displayed, indicating the installation is finished. Click **Close** to continue the installation process and install the Content Server WSS.

The [Select Installation Folder Screen](#) (page 2-16) is displayed.

10. 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 the Content Server WSS should be installed for anyone who uses the computer. Click **Just me** to install for yourself. Click **Next** to continue.

The [Specify URL Screen](#) (page 2-17) is displayed.

11. 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 /idcplg designation.

The [Administrator Name Screen](#) (page 2-18) is displayed.

12. Enter the user names on the SharePoint and Content Server for the administrator. Click **Next** to continue.

13. An information screen is displayed, indicating the beginning of the Web Parts product portion of the installation. Click **Next** to continue.

14. 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.

15. When installation finishes, you can set up the Web Parts product configuration. See [Post-Installation Configuration](#) (page 2-7) for details.



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. See [App Settings](#) (page A-11) for details about this file and the settings in it.

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.

These components can be installed on the Content Server using the Component Manager or the Component Wizard. See [Installing with Component Manager](#) (page 2-5) and [Installing With Component Wizard](#) (page 2-6) for details.

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.

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—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).

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.

POST-INSTALLATION CONFIGURATION

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

- ❖ [Adding Custom Fields to the Content Server](#) (page 2-7)
- ❖ [Adding the SharePoint IP Address](#) (page 2-8)
- ❖ [Adding Content Server to Your SharePoint System](#) (page 2-9)

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

Adding Custom Fields to the Content Server

After installation, a custom field must be added to the Content Server to support SharePoint customizations. 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.

Now 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.

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, select System Properties from the Windows Start menu:
Start—Programs—Content Server—instance—Utilities—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.

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.

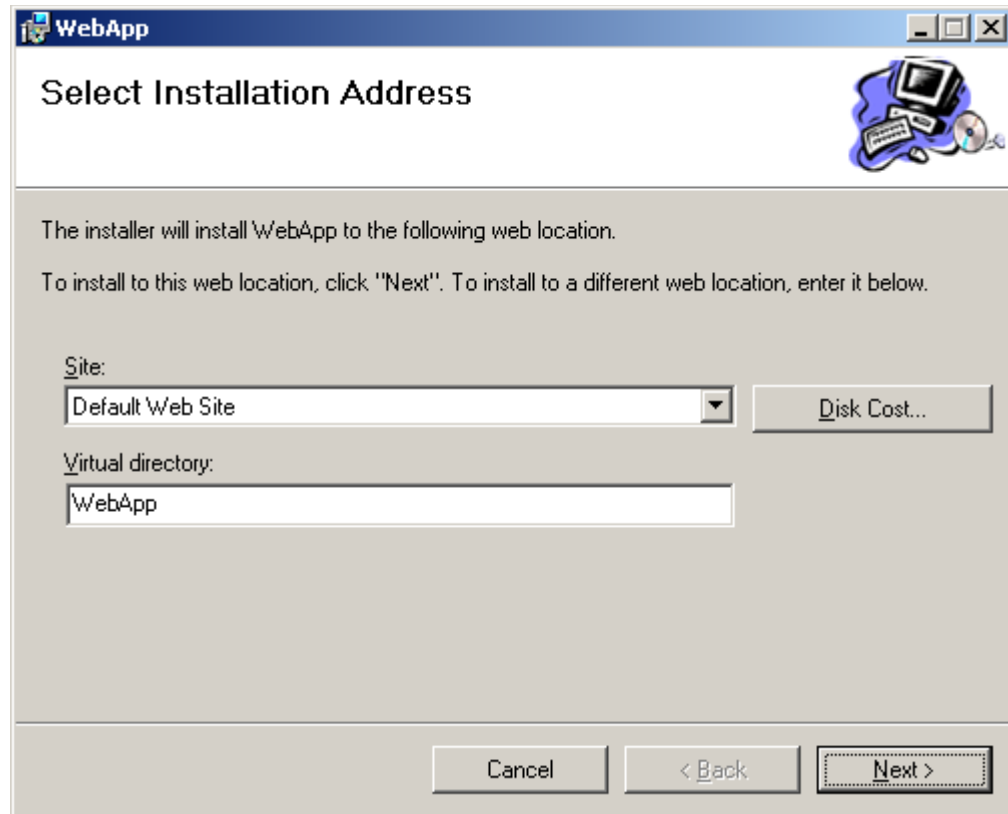
1. On the [SharePoint Main Screen](#) (page 2-19), click **Sites**.
The [SharePoint Site Listing Screen](#) (page 2-20) is displayed.
2. Click the name of the site where the Content Server should be added.
The [SharePoint Site Content Screen](#) (page 2-21) is displayed.
3. Click **Create** at the top of the page to create a new page in the site.
The [SharePoint Create Page Screen](#) (page 2-22) is displayed.
4. Select **Content Server Web Parts page**.
The [New Content Server Web Parts Page](#) (page 2-23) 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](#) (page 2-24) 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.

INSTALLATION INTERFACE SCREENS

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

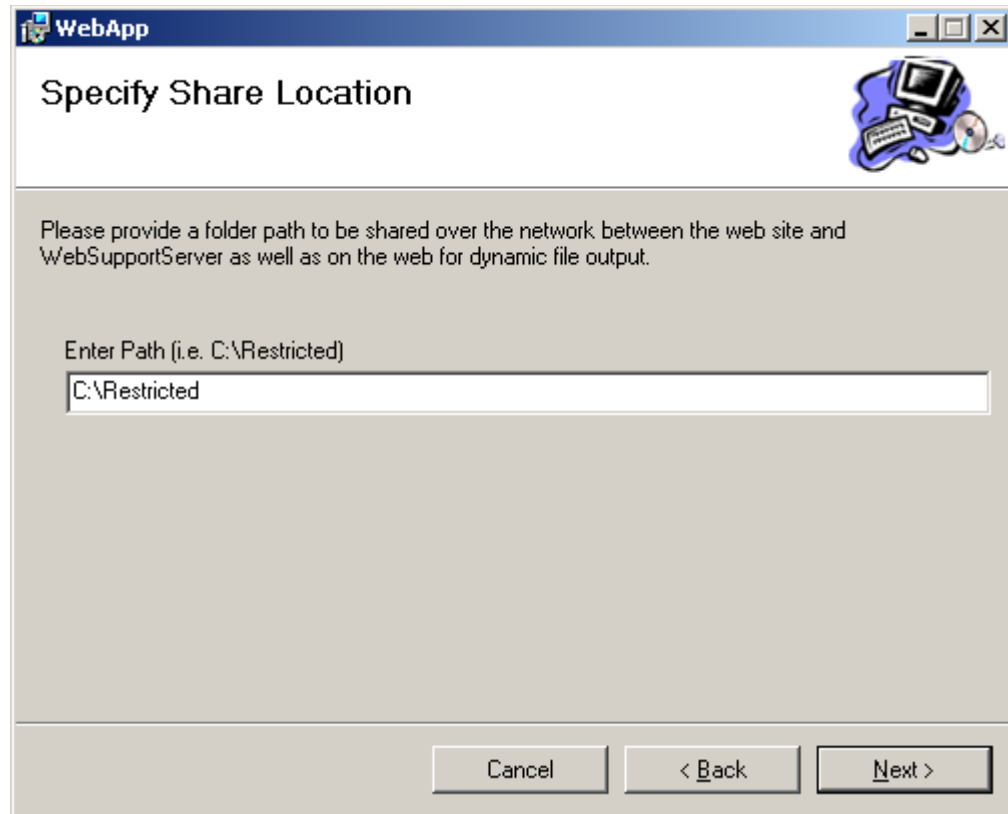
- ❖ [Select Installation Address Screen](#) (page 2-11)
- ❖ [Specify Share Location Screen](#) (page 2-12)
- ❖ [Automated Web Site Emails Screen](#) (page 2-13)
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- ❖ [SharePoint Site Listing Screen](#) (page 2-20)
- ❖ [SharePoint Site Content Screen](#) (page 2-21)
- ❖ [SharePoint Create Page Screen](#) (page 2-22)
- ❖ [New Content Server Web Parts Page](#) (page 2-23)
- ❖ [New Page Screen](#) (page 2-24)

Select Installation Address Screen



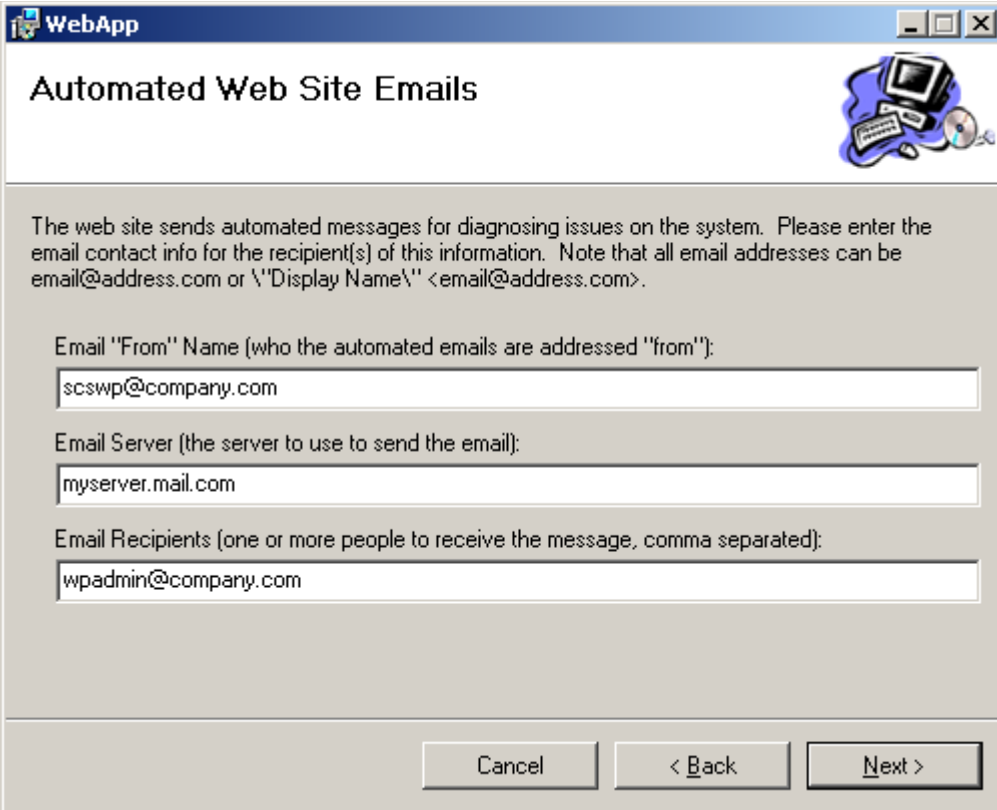
This screen is used to specify the web location for the software. This is the second screen in the installation series. See [Using the Installer](#) (page 2-3) for details.

Specify Share Location Screen



This screen is used to provide a path to a directory that will be shared over the network. This is the third screen in the installation series. See [Using the Installer](#) (page 2-3) for details.

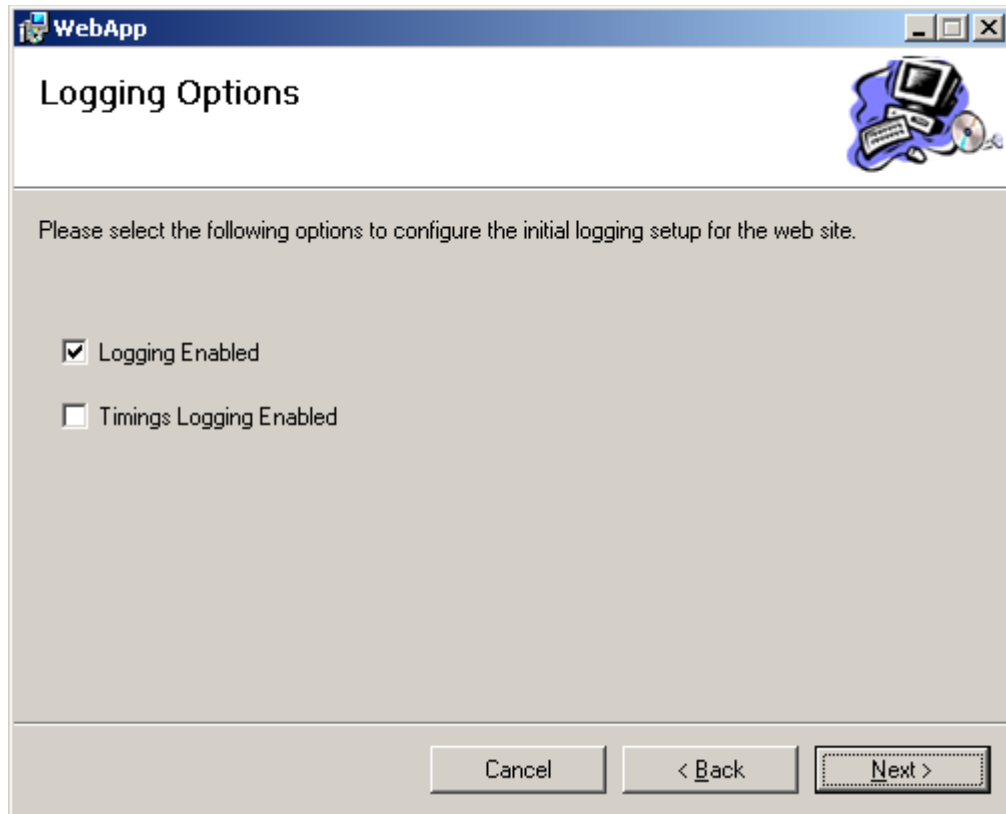
Automated Web Site Emails Screen



The screenshot shows a Windows-style dialog box titled "Automated Web Site Emails" within a window labeled "WebApp". The dialog has a title bar with standard minimize, maximize, and close buttons. In the top right corner of the dialog, there is an icon depicting a computer monitor, keyboard, mouse, and a CD-ROM. The main text area contains the following instructions: "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>." Below the text are three text input fields. The first field is labeled "Email 'From' Name (who the automated emails are addressed 'from'):" and contains the text "scswp@company.com". The second field is labeled "Email Server (the server to use to send the email):" and contains "myserver.mail.com". The third field is labeled "Email Recipients (one or more people to receive the message, comma separated):" and contains "wpadmin@company.com". At the bottom of the dialog, there are three buttons: "Cancel", "< Back", and "Next >".

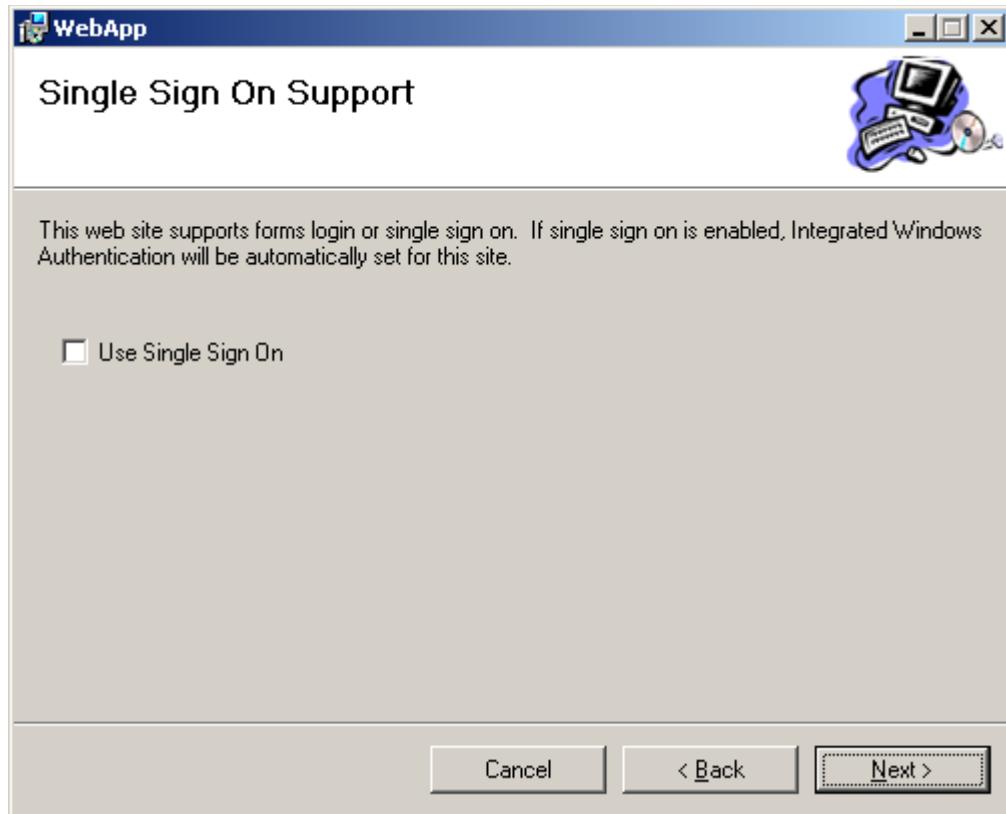
This screen is used to specify who will receive diagnostic emails. This is the fourth screen in the installation series. See [Using the Installer](#) (page 2-3) for details.

Logging Options Screen



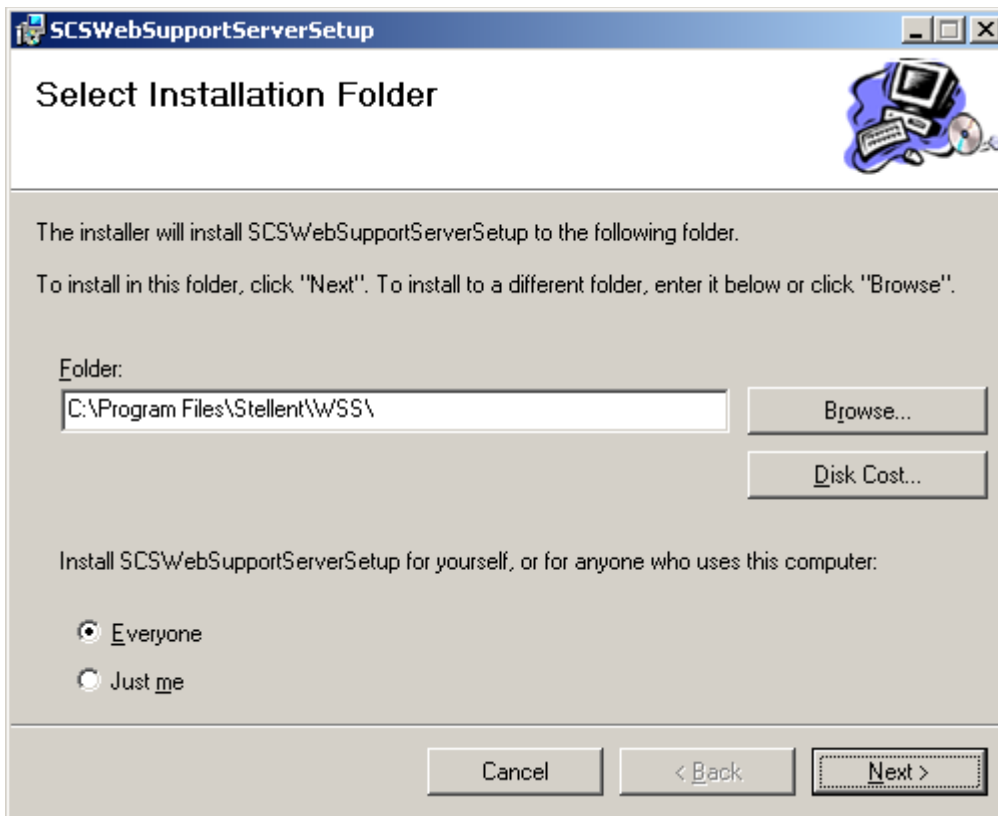
This screen is used to specify the type of logging that will be initially used. This is the fifth screen in the installation series. See [Using the Installer](#) (page 2-3) for details.

Select Sign On Support Screen



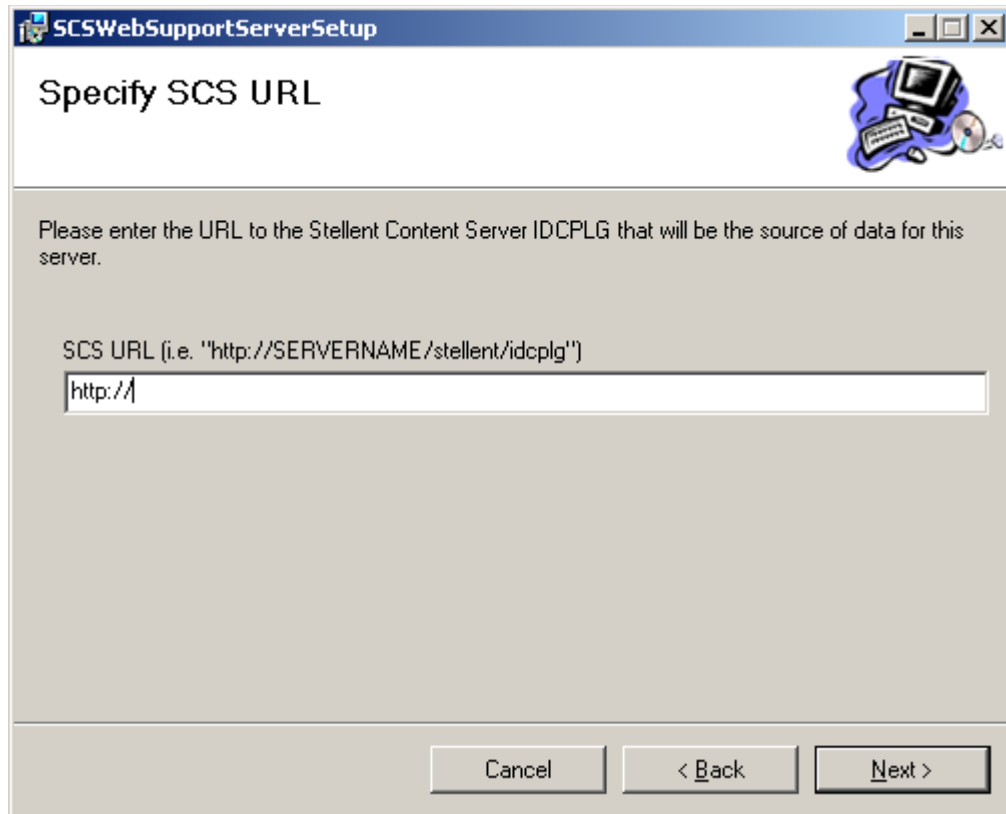
This screen is used to specify the type of sign on that is used. This is the sixth screen in the installation series. See [Using the Installer](#) (page 2-3) for details.

Select Installation Folder Screen



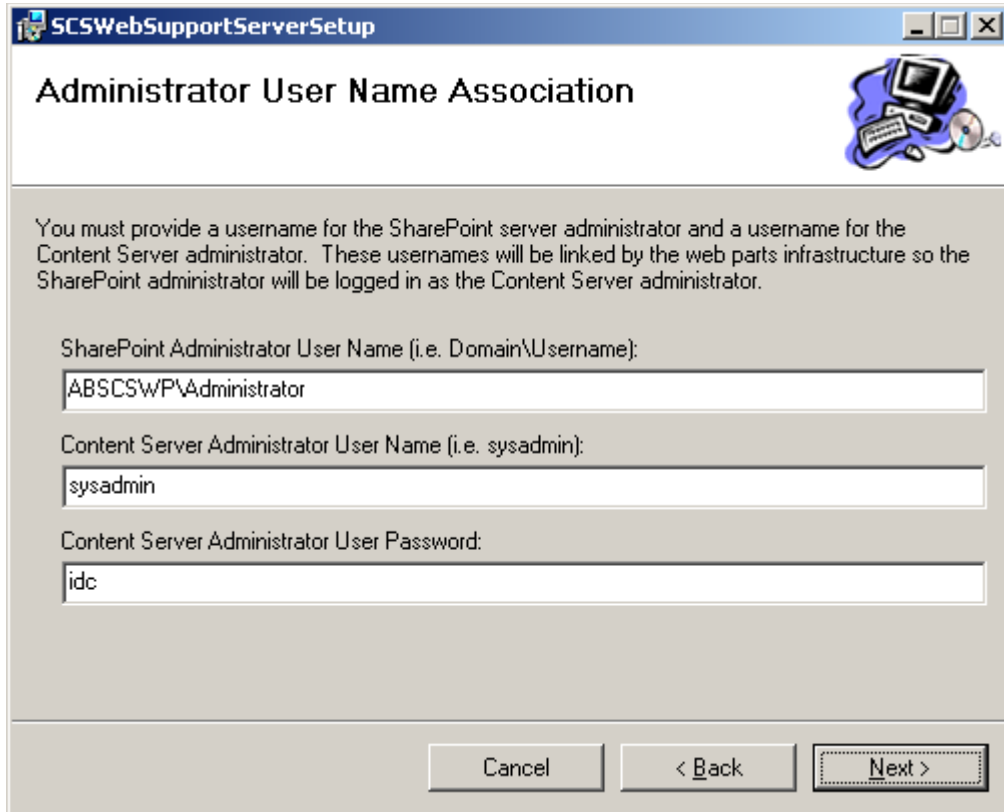
This screen is used to specify the location of software installation. This is the tenth screen in the installation series. See [Using the Installer](#) (page 2-3) for details.

Specify URL Screen



This screen is used to specify the URL of the Content Server used. This is the eleventh screen in the installation series. See [Using the Installer](#) (page 2-3) for details.

Administrator Name Screen



The screenshot shows a Windows-style window titled "SCSWebSupportServerSetup" with a standard title bar (minimize, maximize, close). The main heading is "Administrator User Name Association" with a small icon of a computer and a CD-ROM to the right. Below the heading is a paragraph of instructions: "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." There are three text input fields: "SharePoint Administrator User Name (i.e. Domain\Username):" containing "ABSCSWP\Administrator", "Content Server Administrator User Name (i.e. sysadmin):" containing "sysadmin", and "Content Server Administrator User Password:" containing "idc". At the bottom are three buttons: "Cancel", "< Back", and "Next >".

This screen is used to specify the user name of the SharePoint administrator and the Content Server administrator. This is the twelfth screen in the installation series. See [Using the Installer](#) (page 2-3) for details.

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.

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](#) (page 2-19).

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

SharePoint Site Content Screen

The screenshot displays the SharePoint Site Content Screen for a site named 'WPTest1'. The interface includes a navigation menu on the left with options like 'Documents', 'Shared Documents', 'New Doc Library', 'Pictures', 'Lists', 'Discussions', and 'Surveys'. The main content area shows a 'Web Parts first test' section with a 'Shared Documents' list. This list contains several documents, including 'Jumper1', 'Jumper15', 'Jumper2', and various 'Stellent Content Server' documents. Below this is an 'SCS Web Part - Workflow Assignments' table with columns for Content ID, Title, Last Action, Last Action Date, and Enter Date.

Type	Name	Modified	Modified By	Checked Out To
	Jumper1	12/8/2006 3:20 PM	ABSCSWPAdministrator	
	Jumper15	12/11/2006 4:45 PM	ABSCSWPAdministrator	
	Jumper2	12/8/2006 3:36 PM	ABSCSWPAdministrator	
	Stellent Content Server - Checkouts	12/4/2006 11:37 AM	ABSCSWPAdministrator	
	Stellent Content Server - Content Search	12/4/2006 11:37 AM	ABSCSWPAdministrator	
	Stellent Content Server - Main	12/4/2006 11:38 AM	ABSCSWPAdministrator	
	Stellent Content Server - Subscriptions	12/4/2006 11:39 AM	ABSCSWPAdministrator	
	Stellent Content Server - Workflow	12/4/2006 11:39 AM	ABSCSWPAdministrator	
	WebParts_0_0_MRD	12/5/2006 1:05 PM	ABSCSWPAdministrator	

	Content ID	Title	Last Action	Last Action Date	Enter Date
<input type="checkbox"/>	1	gdfgdfgd	CHECKOUT	11/29/06 1:05 ...	10/17/06 9:24 ...
<input type="checkbox"/>	2	esj_000005	MS Word GIF	11/27/06 11:5...	11/27/06 11:5...
<input type="checkbox"/>	3	esj_000004	My First Folder	11/27/06 11:5...	11/27/06 11:5...
<input type="checkbox"/>	4	sdfsd	UNDO_CHECK...	11/17/06 11:3...	10/19/06 2:50 ...
<input type="checkbox"/>	5	dfsd	UNDO_CHECK...	11/13/06 12:5...	10/17/06 9:24 ...

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](#) (page 2-20).

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

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](#) (page 2-21).

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

New Content Server Web Parts Page

Microsoft Office
SharePoint Portal Server 2003

My Site Site Settings Help

Home Topics News Sites

ABSCSWP Portal
New Stellent Content Server (R) Web Part Page

Stellent Content Server (R) Web Parts open up the world of enterprise content management for use in SharePoint. The templates below allow administrators to link to this functionality in SharePoint to support existing site integrations. Stellent Content Server has many more features besides those shown here! Log in to [Stellent Content Server](#) to find out more, or to [Stellent's Content Server Website](#) for product info.

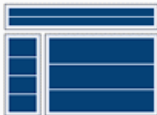
Name

Type a file name for your Stellent Content Server (R) Web Part Page. The file name appears in headings and links throughout the site.

Name: .aspx
 Overwrite if file already exists?

Layout

Select a template to arrange and preload Stellent Content Server (R) Web Parts in zones on the page. Further 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 Stellent Content Server

Template:

- SCS Checkouts Page
- SCS Contents Search Page
- SCS Navigation and Utilities Page**
- SCS Subscriptions Page
- SCS Workflow Page

Save Location

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

Document Library:

Create Cancel

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](#) (page 2-22).

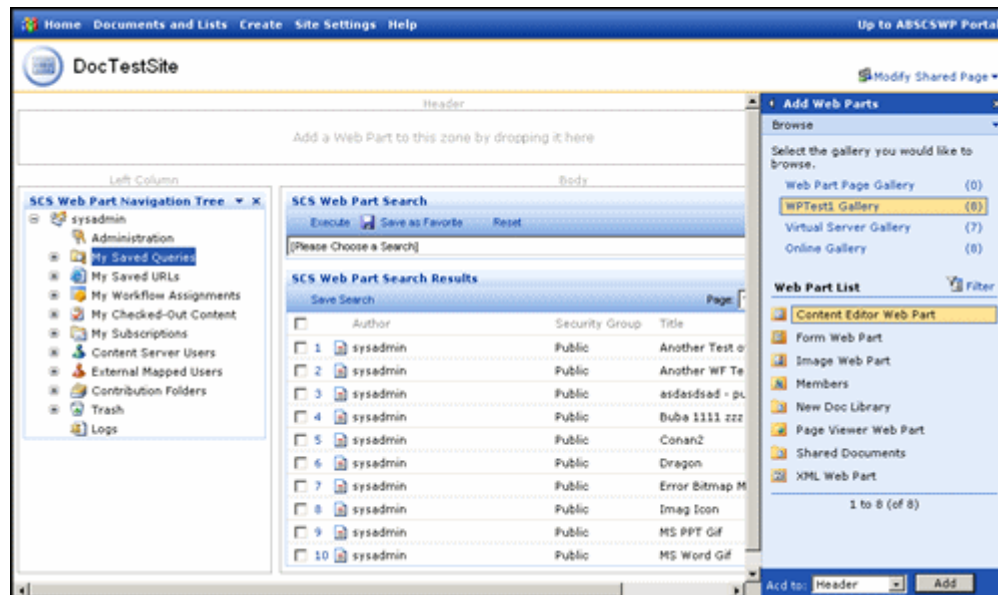
This screen is divided into three sections:

- ❖ **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](#) (page 2-24) is displayed in the layout you selected.

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.

UNINSTALLING THE SOFTWARE

To uninstall the Web Parts product, uninstall the web parts on the SharePoint server. 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.



Note: Uninstalling a component means that the content server no longer recognizes the component, but the component files are not deleted from the file system.

USING WEB PARTS

OVERVIEW

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

Concepts

- ❖ [Searching and Viewing Content](#) (page 3-4)
- ❖ [Accessing Frequently Used URLs](#) (page 3-7)
- ❖ [Managing Workflows](#) (page 3-8)
- ❖ [Managing Subscriptions](#) (page 3-11)
- ❖ [Sharing Content on the Content Server](#) (page 3-12)

Tasks

- ❖ [Searching Stored Content](#) (page 3-4)
- ❖ [Creating a Query](#) (page 3-6)
- ❖ [Executing a Saved Query](#) (page 3-7)
- ❖ [Removing a Saved Query](#) (page 3-7)
- ❖ [Storing a URL](#) (page 3-7)
- ❖ [Using a Saved URL](#) (page 3-8)
- ❖ [Removing a URL](#) (page 3-8)

- ❖ [Managing Workflows](#) (page 3-8)
- ❖ [Managing Content](#) (page 3-9)
- ❖ [Subscribing to Content](#) (page 3-11)
- ❖ [Viewing Subscription Details and Content](#) (page 3-12)
- ❖ [Unsubscribing from Content](#) (page 3-12)

Interface

- ❖ [Main Page](#) (page 3-14)
- ❖ [Page Header](#) (page 3-14)
- ❖ [Library Listing Screen](#) (page 3-23)
- ❖ [Main Navigation Tree](#) (page 3-15)
- ❖ [Main Page Search Section](#) (page 3-17)
- ❖ [Content Viewer Screen](#) (page 3-17)
- ❖ [Item Properties Screen](#) (page 3-19)
- ❖ [My Saved Queries Folder](#) (page 3-20)
- ❖ [My Saved URLs Folder](#) (page 3-20)
- ❖ [Saved URL Dialog Screen](#) (page 3-21)
- ❖ [My Subscriptions Folder](#) (page 3-22)
- ❖ [Library Listing Screen](#) (page 3-23)
- ❖ [Web Part Pulldown](#) (page 3-23)
- ❖ [Content Check In Screen](#) (page 3-22)
- ❖ [Promote to Enterprise Menu](#) (page 3-24)



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.

ACCESSING THE FUNCTIONALITY

To access the Web Parts product, click the appropriate menu option on your SharePoint system. The [Main Page](#) (page 3-14) 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](#) (page 3-15) in the left section: Displays those options that are available to the logged-in user.
- ❖ The [Main Page Search Section](#) (page 3-17) in the body section: Used to execute searches on stored content.
- ❖ The header at the top of the screen: Contains the site name and the Modify Menu on the top right corner of the screen. This menu is used to change the layout and number of items on your screen. See [Chapter 4 \(Customizing the Software\)](#) for details on its use.


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](#) (page 3-15) 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.

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 **Design This Page** selection on the [Modify Menu](#) (page 4-12), 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](#) (page 4-5) for details.
- ❖ **Delete:** (Design This Page only): Available for Administrators only. Deletes the section. See [Modifying Web Parts](#) (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.

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](#) (page 3-4)
- ❖ [Viewing Content](#) (page 3-5)
- ❖ [Viewing Content Details](#) (page 3-6)
- ❖ [Creating a Query](#) (page 3-6)
- ❖ [Executing a Saved Query](#) (page 3-7)
- ❖ [Removing a Saved Query](#) (page 3-7)

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 [My Saved Queries Folder](#) (page 3-20) or from the menu in the Web Search portion of the [Main Page Search Section](#) (page 3-17) in the [Main Page](#) (page 3-14).

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 [My Saved Queries Folder](#) (page 3-20) with a search form icon (). 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.

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](#) (page 3-17) is displayed.
 4. When done viewing the content item, select **File—Close Window**.

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](#) (page 3-19) is displayed.
3. When you finish viewing details, click **OK**.

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](#) (page 3-20) in the [Main Navigation Tree](#) (page 3-15).

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

1. Select **All Fields** from either the [My Saved Queries Folder](#) (page 3-20) or from the menu in the Web Search portion of the [Main Page Search Section](#) (page 3-17) in the [Main Page](#) (page 3-14).
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](#) (page 3-17).
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](#) (page 3-20).
6. Click **OK**.
The new link is displayed in the [My Saved Queries Folder](#) (page 3-20).


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](#) (page 3-20). 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 drop down list in the SCS Web Search portion of the [Main Page Search Section](#) (page 3-17). Click **Execute** to run the query.

The results of the query are displayed in the Results area of the [Main Page Search Section](#) (page 3-17).



Note: If the system administrator for your site created specialized search forms, these appear in the [My Saved Queries Folder](#) (page 3-20) with a search form icon (). 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.

Removing a Saved Query

To remove a query from the [My Saved Queries Folder](#) (page 3-20), click the My Saved Query selection icon () for the query you want to remove. A popup menu is displayed. Select **Remove**. The query is removed from the [My Saved Queries Folder](#) (page 3-20).

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](#) (page 3-7)
- ❖ [Using a Saved URL](#) (page 3-8)
- ❖ [Removing a URL](#) (page 3-8)

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 () or on the icon for any previously saved URL.
2. Select **Create New URL** from the popup menu that is displayed.
The [Saved URL Dialog Screen](#) (page 3-21) is displayed.
3. Enter the name for the saved URL. This will appear in the [My Saved URLs Folder](#) (page 3-20) in the [Main Navigation Tree](#) (page 3-15).
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](#) (page 3-20).

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](#) (page 3-20).
- ❖ Click the My Saved URL icon () 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.

Removing a URL


To remove a URL from the [My Saved URLs Folder](#) (page 3-20) , follow this procedure:

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

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 () in the [Main Navigation Tree](#) (page 3-15).

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

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 () to display a menu for each workflow item. The following options may appear on that menu:
 - **Item Properties:** Displays the [Item Properties Screen](#) (page 3-19) 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](#) (page 3-17) 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 () indicates that the item has been checked out. It cannot proceed through the workflow review process until it has been checked in.


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](#) (page 3-10)
- ❖ [Checking Out Content](#) (page 3-10)
- ❖ [Changing an Item's Check-Out Status](#) (page 3-11)

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 ( icon in the [Main Navigation Tree](#) (page 3-15).

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

2. Click the Checked Out icon () in front of an item name to display a menu for each item:
 - **Item Properties:** Displays the [Item Properties Screen](#) (page 3-19) where you can view metadata for the item.
 - **Check In:** Displays the [Content Check In Screen](#) (page 3-22) where you add specific details about the current check-in of the item.
 - **View with default viewer:** Displays the [Content Viewer Screen](#) (page 3-17) 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.



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

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](#) (page 3-4) and [Executing a Saved Query](#) (page 3-7) 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](#) (page 3-17).
3. Select **Check-Out** from the displayed popup menu.

The content item name is displayed in the [My Checked-Out Content Folder](#) (page 3-21).

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 () in front of an item name in the [My Checked-Out Content Folder](#) (page 3-21).
2. Select **Undo Check-Out** from the displayed popup menu.

The content item name is removed from the [My Checked-Out Content Folder](#) (page 3-21).

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](#) (page 3-11)
- ❖ [Viewing Subscription Details and Content](#) (page 3-12)
- ❖ [Unsubscribing from Content](#) (page 3-12)

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](#) (page 3-4) and [Executing a Saved Query](#) (page 3-7) 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](#) (page 3-17).
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. If you log out and log back in, you will need to enter your contact information again.
5. Click OK after entering your contact information.


The content item name is displayed in the [My Subscriptions Folder](#) (page 3-22).

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](#) (page 3-5) and [Viewing Content Details](#) (page 3-6) for information.

Unsubscribing from Content

Follow these steps to unsubscribe from a content item:

1. Click the subscription icon () next to the name of the subscribed item in the [My Subscriptions Folder](#) (page 3-22).
2. Select **Unsubscribe** from the displayed popup menu.

The content item name is removed from the [My Subscriptions Folder](#) (page 3-22).

SHARING CONTENT ON THE CONTENT SERVER

When content is ‘promoted’ from the SharePoint server to the Content Server, it is removed from the SharePoint server. A link remains to the item in SharePoint so the user can access it in the Content Server from SharePoint. However, once it has been promoted, it is now stored in the Content Server. 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](#) (page 2-21).
The [Library Listing Screen](#) (page 3-23) is displayed.
2. Rest your cursor on the content item to be promoted.
The [Web Part Pulldown](#) (page 3-23) is displayed.
3. Select **Promote to Enterprise** from the [Promote to Enterprise Menu](#) (page 3-24).
The [Content Check In Screen](#) (page 3-22) 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](#) (page 2-21).

The [Library Listing Screen](#) (page 3-23) is displayed.

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

The [Web Part Pulldown](#) (page 3-23) is displayed.

3. Select **Bring Back to SharePoint** from the [Promote to Enterprise Menu](#) (page 3-24). This option appears for those items which have been promoted and are now available for return.

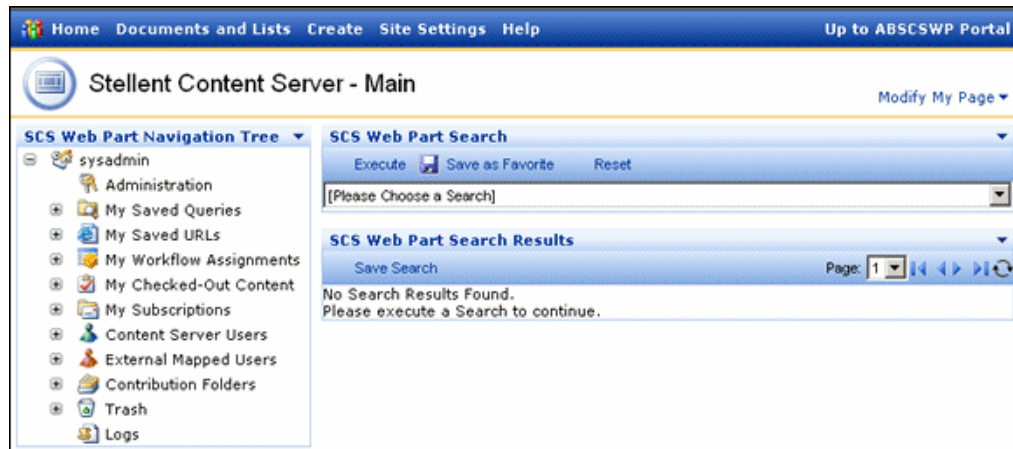
INTERFACE SCREENS

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

- ❖ [Main Page](#) (page 3-14)
- ❖ [Page Header](#) (page 3-14)
- ❖ [Library Listing Screen](#) (page 3-23)
- ❖ [Main Navigation Tree](#) (page 3-15)
- ❖ [Main Page Search Section](#) (page 3-17)
- ❖ [Content Viewer Screen](#) (page 3-17)
- ❖ [Item Properties Screen](#) (page 3-19)
- ❖ [My Saved Queries Folder](#) (page 3-20)
- ❖ [My Saved URLs Folder](#) (page 3-20)
- ❖ [Saved URL Dialog Screen](#) (page 3-21)
- ❖ [My Subscriptions Folder](#) (page 3-22)
- ❖ [Library Listing Screen](#) (page 3-23)
- ❖ [Web Part Pulldown](#) (page 3-23)
- ❖ [Content Check In Screen](#) (page 3-22)

- ❖ [Promote to Enterprise Menu](#) (page 3-24)


Main Page



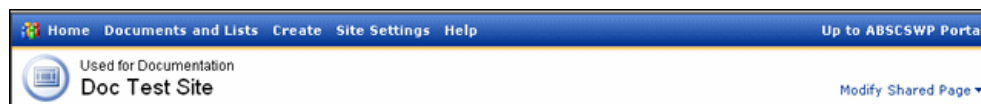
The main page contains the elements of the Web Parts product that have been selected for use at your site. This screen can be customized to create a page that addresses the specific needs of users in your environment. Because of that, the screen shown here may differ than the one in use at your site.

This screen is divided into several different sections:

- ❖ [Page Header](#) (page 3-14)
- ❖ [Main Navigation Tree](#) (page 3-15)
- ❖ [Main Page Search Section](#) (page 3-17)

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

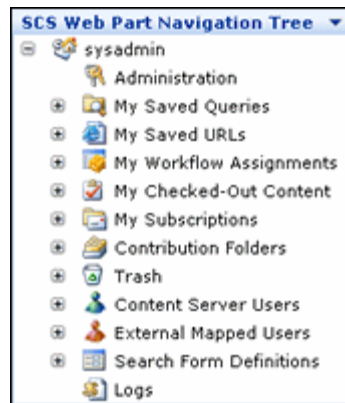
Page Header



The Page Header contains the customized icon and header text for your page. See [Customizing the Title Bar \(Admin Only\)](#) (page 4-6) for details about customizing the header.

The [Modify Menu](#) (page 4-12) is also available in the header section. See [Chapter 4 \(Customizing the Software\)](#) for details about using the options on this menu.

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 all possible 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.



Tech 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](#) (page 3-17). For example, if you click My Saved URLs, a list of saved URLs is splayed in the Search Results pane.

Icon	Description
	The home icon is accompanied by the name of the logged in user.
	Administration (Admin Only): Opens the Main Admin Screen (page 5-6) where administrators can modify aspects of the system.

Icon	Description
	My Saved Queries: Displays a list of queries that were created and saved. See Creating a Query (page 3-6) for more details.
	My Saved URLs: Displays a list of saved URLs. See Storing a URL (page 3-7) 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 (page 3-11) 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 Designing Custom Search Forms (Admin Only) (page 4-3) for details.
	Contribution Folders: If folders are installed, accesses a list of folders.
	Trash: If folders are installed, accesses the folder trash directory.

Icon	Description
	Logs: Displays the Log Menu Screen (page 5-7). See Troubleshooting (page 5-4) for details about using log files.

Main Page Search Section

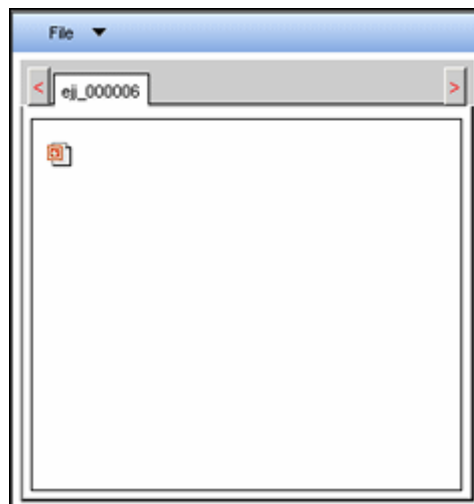


The Search Section of the main page is divided into two areas: the Web Parts Search and the Web Parts Search Results.





- ❖ 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](#) (page 3-4) and [Creating a Query](#) (page 3-6) for details.

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.

Item Properties Screen

Content Information





Content ID: ejj_000018
Revision: 3
Content Type: ADACCT
Title: asdasdsad - pumkin
Author: sysadmin
Folder:
Comments:
Hidden: FALSE
Inhibit Propagation: FALSE
Read Only: FALSE
Trash Delete Date:
Trash Delete Location:
Trash Delete Old Name:
Trash Deleter:
Another My Text Docs:
AgainMyField: None
AnotherDepField: None
State:
City: None
Security Group: Public
Account:
Checked Out By:
Status: RELEASED
Formats: Application/jpg
Revision History:

		Expiration Date	Status	Release Date	Revision ID
<input type="checkbox"/>	1		RELEASED	10/17/06 9:22 AM	3
<input type="checkbox"/>	2		RELEASED	10/17/06 9:22 AM	2
<input type="checkbox"/>	3		RELEASED	10/17/06 9:19 AM	1

OK Cancel

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:

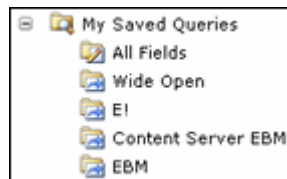
- My workflow assignments ()
- My checked-out content ()
- My subscriptions ()
- Document in a search result ()

Select **Item Properties** from the displayed menu. When done, click **OK**.



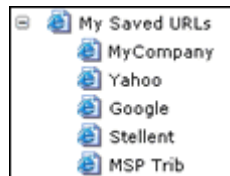
Note: Item Properties is used to view the metadata about a content item, such as its content ID, checkin-in information, and revisions. It is not used to view the actual content item.

My Saved Queries Folder



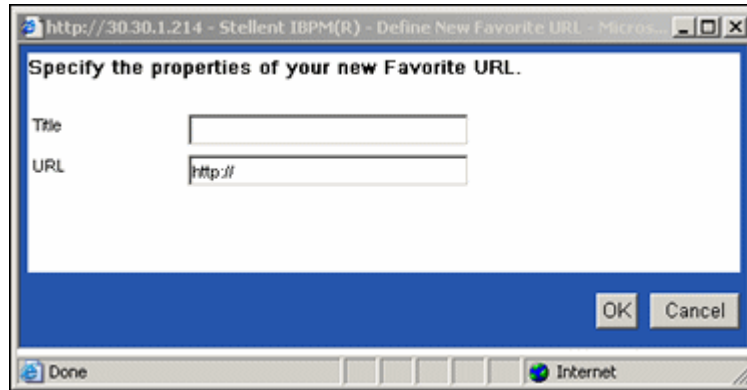
The My Saved Queries portion of the [Main Navigation Tree](#) (page 3-15) displays the queries that were created and saved for the logged-in user. See [Creating a Query](#) (page 3-6) for details.

My Saved URLs Folder



The My Saved URLs portion of the [Main Navigation Tree](#) (page 3-15) displays the URLs that were saved for the logged-in user. See [Storing a URL](#) (page 3-7) for details.

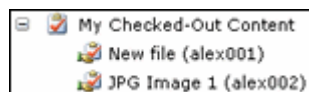
Saved URL Dialog Screen



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](#) (page 3-20). See [Storing a URL](#) (page 3-7) for details.

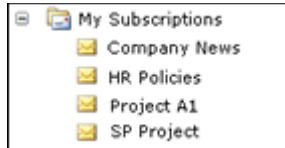
Field	Description
Name	The name for the link that will appear in the My Saved URLs Folder (page 3-20).
URL	The web site location for the URL to be associated with the name.

My Checked-Out Content Folder



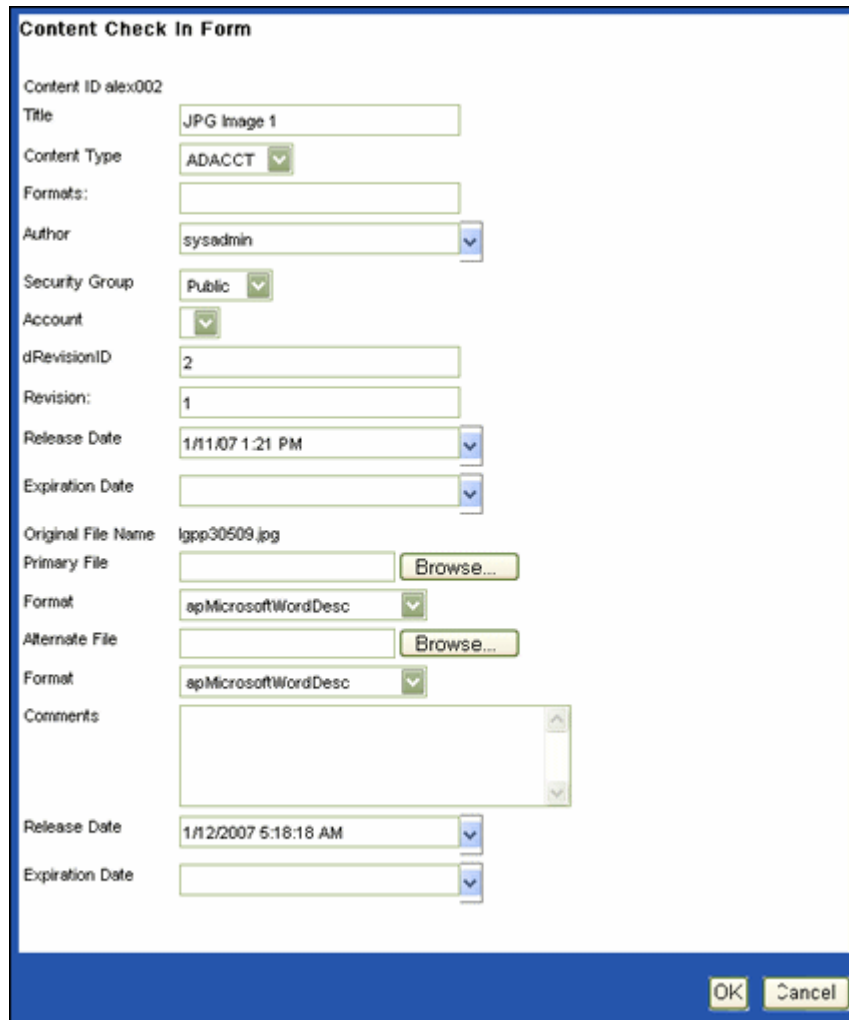
The My Checked-Out Content portion of the [Main Navigation Tree](#) (page 3-15) displays the content checked out to the current user. See [Checking Out Content](#) (page 3-10) for details.

My Subscriptions Folder




The My Subscriptions portion of the [Main Navigation Tree](#) (page 3-15) displays the subscriptions created and saved for the logged-in user. See [Subscribing to Content](#) (page 3-11) for details.

Content Check In Screen

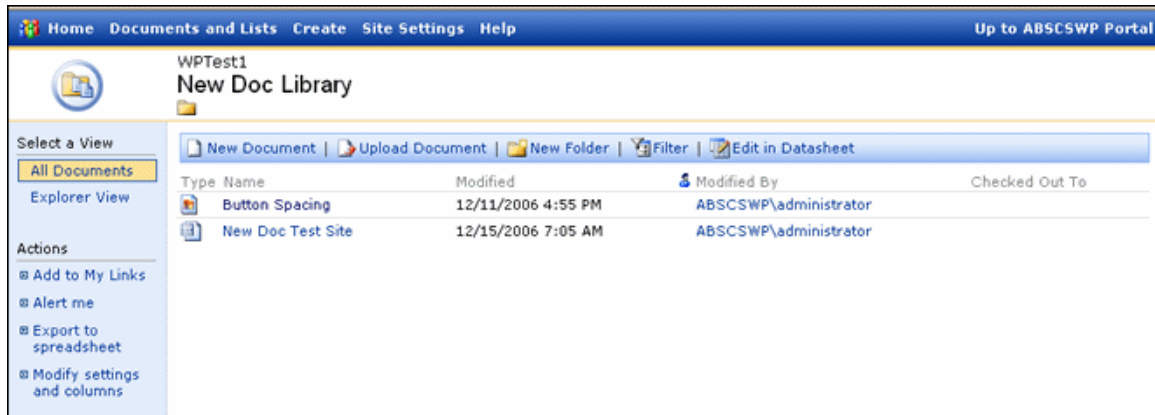
A screenshot of a 'Content Check In Form' window. The form contains the following fields and controls:

- Content ID: alex002
- Title: JPG Image 1
- Content Type: ADACCT (dropdown)
- Formats: (empty text box)
- Author: sysadmin (dropdown)
- Security Group: Public (dropdown)
- Account: (dropdown)
- dRevisionID: 2
- Revision: 1
- Release Date: 1/11/07 1:21 PM (dropdown)
- Expiration Date: (dropdown)
- Original File Name: lgpp30509.jpg
- Primary File: (text box) with a 'Browse...' button
- Format: apMicrosoftWordDesc (dropdown)
- Alternate File: (text box) with a 'Browse...' button
- Format: apMicrosoftWordDesc (dropdown)
- Comments: (text area)
- Release Date: 1/12/2007 5:18:18 AM (dropdown)
- Expiration Date: (dropdown)

At the bottom right of the form are 'OK' and 'Cancel' buttons.

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 () menu.


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](#) (page 2-21).

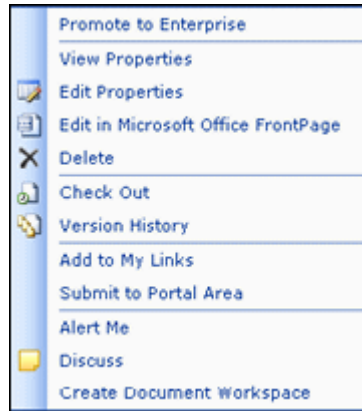
See your SharePoint documentation for complete details about using other options on this screen.


Web Part Pulldown

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

The Web Part Pulldown is available by resting the cursor on the web part name in the [Library Listing Screen](#) (page 3-23). This menu is used to promote content for use in the SharePoint server. See [Sharing Content on the Content Server](#) (page 3-12) for details.

Promote to Enterprise Menu



The Promote to Enterprise 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](#) (page 3-23) 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

OVERVIEW

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 \(Admin Only\)](#) (page 4-3)
- ❖ [Designing Custom Search Forms \(Admin Only\)](#) (page 4-3)
- ❖ [Adding Web Parts \(Admin Only\)](#) (page 4-4)
- ❖ [Add Web Parts by Browsing](#) (page 4-4)
- ❖ [Add Web Parts by Searching](#) (page 4-5)
- ❖ [Add Web Parts by Importing](#) (page 4-5)
- ❖ [Customizing the Title Bar \(Admin Only\)](#) (page 4-6)
- ❖ [Customizing the Navigation Tree](#) (page 4-7)
- ❖ [Customizing the Search Criteria Section](#) (page 4-8)
- ❖ [Modifying the Layouts and Advanced Settings](#) (page 4-9)

- ❖ [Customizing the Search Results Section](#) (page 4-8)
- ❖ [Designing the Page](#) (page 4-11)

Interface

- ❖ [Modify Menu](#) (page 4-12)
- ❖ [Search Form Options Screen \(Admin Only\)](#) (page 4-13)
- ❖ [Define New Search Form Screen \(Admin Only\)](#) (page 4-14)
- ❖ [Add Web Parts Menu \(Admin Only\)](#) (page 4-14)
- ❖ [Add Web Parts \(Browse\) Screen \(Admin Only\)](#) (page 4-15)
- ❖ [Add Web Parts \(Search\) Screen \(Admin Only\)](#) (page 4-16)
- ❖ [Add Web Parts \(Import\) Screen \(Admin Only\)](#) (page 4-17)
- ❖ [Modify Web Parts Screen](#) (page 4-17)
- ❖ [Change Page Title Screen \(Admin Only\)](#) (page 4-18)
- ❖ [Change Navigation Tree Screen](#) (page 4-19)
- ❖ [Change Search Criteria Screen](#) (page 4-20)
- ❖ [Change Search Results Screen](#) (page 4-21)
- ❖ [Layout and Advanced Screen](#) (page 4-22)

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 \(Admin Only\)](#) (page 4-3)
- ❖ [Designing Custom Search Forms \(Admin Only\)](#) (page 4-3)
- ❖ [Adding Web Parts \(Admin Only\)](#) (page 4-4)
- ❖ [Modifying Web Parts](#) (page 4-5)

- ❖ [Customizing the Title Bar \(Admin Only\)](#) (page 4-6)
- ❖ [Customizing the Navigation Tree](#) (page 4-7)
- ❖ [Customizing the Search Criteria Section](#) (page 4-8)
- ❖ [Customizing the Search Results Section](#) (page 4-8)
- ❖ [Designing the Page](#) (page 4-11)

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 **Shared View** on the [Modify Menu](#) (page 4-12).
- ❖ To modify the page for your own use, click **Personal View** on the [Modify Menu](#) (page 4-12).

A box is displayed around the shared icon () or the personal icon (), indicating which option is selected.



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](#) (page 3-15).
The [Search Form Options Screen \(Admin Only\)](#) (page 4-13) is displayed.
2. Select a definition to use for your search form. You can modify the fields that are included in the search.
The [Define New Search Form Screen \(Admin Only\)](#) (page 4-14) is displayed.
3. Enter a name for the new search form.
4. 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 [My Saved Queries Folder](#) (page 3-20) with a search form icon (), which is different than the icon used for personally created queries ().



Note: The search form does not appear in the folder until you log out and log back in.

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.

There are three ways to add web parts to the page:

- ❖ [Add Web Parts by Browsing](#) (page 4-4)
- ❖ [Add Web Parts by Searching](#) (page 4-5)
- ❖ [Add Web Parts by Importing](#) (page 4-5)

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

1. Click the [Modify Menu](#) (page 4-12).
2. Click the horizontal arrow next to Add Web Parts.
The [Add Web Parts Menu \(Admin Only\)](#) (page 4-14) is displayed.
3. Select the method you want to use to add web parts.

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.

Add Web Parts by Browsing

If you select **Browse**, the [Add Web Parts \(Browse\) Screen \(Admin Only\)](#) (page 4-15) 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



Tech 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. 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.

Add Web Parts by Searching

If you select **Search**, the [Add Web Parts \(Search\) Screen \(Admin Only\)](#) (page 4-16) 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. 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.

Add Web Parts by Importing

If you select **Import**, the [Add Web Parts \(Import\) Screen \(Admin Only\)](#) (page 4-17) 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.

Modifying Web Parts

You can modify individual sections of the Web Parts product page by using the **Modify My Web Parts** or **Modify Shared Parts** options on the [Modify Menu](#) (page 4-12). **Modify Shared Parts** is only available on menus when the user has Administrative privileges.

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:

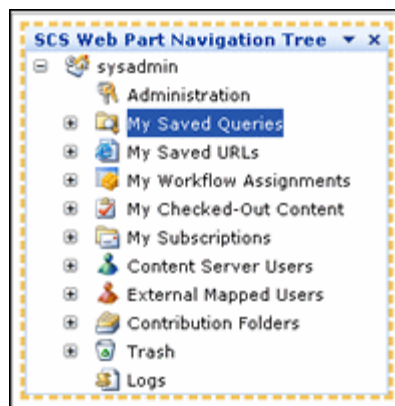
- ❖ [Customizing the Title Bar \(Admin Only\)](#) (page 4-6)
- ❖ [Customizing the Navigation Tree](#) (page 4-7)
- ❖ [Customizing the Search Criteria Section](#) (page 4-8)
- ❖ [Customizing the Search Results Section](#) (page 4-8)




Note: If you modified shared web parts and closed a web part using the [Parts Submenu](#) (page 3-3), that web part no longer appears on the Modify Web Parts menu. Only active web parts appear on the menu. In addition, if you unchecked **Visible on Page** 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.

Figure 4-1 Modification highlighting



Clicking the down arrow () displays the [Parts Submenu](#) (page 3-3), which can be used to quickly change aspects of the section. Clicking the X closes the screen.

Customizing the Title Bar (Admin Only)

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

1. Select **Web Part Page Title Bar** from the [Modify Web Parts Screen](#) (page 4-17).
The [Change Page Title Screen \(Admin Only\)](#) (page 4-18) 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**.

Customizing the Navigation Tree

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

1. Select **SCS Web Part Navigation Tree** from the [Modify Web Parts Screen](#) (page 4-17).



Note: If the Navigation Title has been previously changed, that title appears on the menu in place of **SCS Web Part Navigation Tree**.

The [Change Navigation Tree Screen](#) (page 4-19) 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 Frame 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 Frame Style for the section. The options include:
 - **None:** no frame will appear around the navigation 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.
 - **Default:** The default for your SharePoint system.
7. Change the layout and link information. See [Modifying the Layouts and Advanced Settings](#) (page 4-9) for details.
8. To view the results of your changes, click **Apply**. To save the changes, click **OK**. To cancel the changes, click **Cancel**.

Customizing the Search Criteria Section

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

1. Select **SCS Web Part Search** from the [Modify Web Parts Screen](#) (page 4-17).



Note: If the Search Section Title has been previously changed, that title appears on the menu in place of **SCS Web Part Search**.

The [Change Search Criteria Screen](#) (page 4-20) 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 Frame 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 Frame Style for the section. The options include:
 - **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.
 - **Default:** The default for your SharePoint system.
7. Change the layout and link information. See [Modifying the Layouts and Advanced Settings](#) (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**.

Customizing the Search Results Section

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

1. Select **SCS Web Part Search Results** from the [Modify Web Parts Screen](#) (page 4-17).



Note: If the Search Results Title has been previously changed, that title appears on the menu in place of **SCS Web Part Search Results**.

The [Change Search Results Screen](#) (page 4-21) 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 Frame 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 Frame Style for the section. The options include:
 - **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.
 - **Default**: The default for your SharePoint system.
7. Change the layout and link information. See [Modifying the Layouts and Advanced Settings](#) (page 4-9) for details.
8. Click the Maximize button (+) next to **WSS Data** to change the WSS Data information. See [Modifying WSS Data](#) (page 4-10) for details.

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

Modifying the Layouts and Advanced Settings

If you click the Maximize button (+) next to Layout or Advanced on a customization page the [Layout and Advanced Screen](#) (page 4-22) is displayed.

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

- ❖ **Visible on Page**: Check this box to make the section visible on the page. If this box is unchecked, the section is hidden.
- ❖ **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
 - Default: The default for your system is used.

- ❖ **Zone:** Select the location for the section. Options include:
 - 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.
- ❖ **Part Order:** Select the location for the section in relation to other web parts in that zone.

Use the Advanced portion of this 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 \(Admin Only\)](#) (page 4-4) for details.
- ❖ **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 Export Sensitive:** Enables exporting for re-use in other pages.
- ❖ **Detail Link:**
- ❖ **Description:** A description of the web part used in the section.
- ❖ **Help Link:** A link to the help file for this web part.
- ❖ **Icon File (Large):** The pathname to the icon file to be used for the web part.
- ❖ **Icon File (Small):** The pathname to the icon file to be used for this web part.
- ❖ **Missing Assembly Error:** The error message displayed if the web part for this section is missing.

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

Modifying WSS Data

If you select **Modify WSS Data** from the [Change Search Results Screen](#) (page 4-21), the [Change WSS Data Screen](#) (page 4-23) is displayed. Use this screen to change the search stack, the search name, and the context menu folder. 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**.

Designing the Page

The Design This Page option on the [Modify Menu](#) (page 4-12) can be used to move web part sections on the page. After selecting this option, move the cursor to the title portion of any section. The cursor changes to a four-way directional arrow. Drag the section to the new location. When finished, select **Design This Page** from the Modify Menu to return to normal usage.

Additional menu options are also available on the [Parts Submenu](#) (page 3-3) in the top right corner of each section. Those special options are noted below:

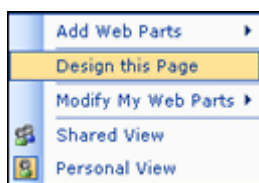
- ❖ **Login**: Logs you into the WSS and the Content Server.
- ❖ **Logout**: Logs you out of the Web Parts product portal page.
- ❖ **Minimize|Restore**: Hides the subsection or restores it if it is hidden.
- ❖ **Close**: Removes the section from the page. You can also close a section by clicking the 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.

THE CUSTOMIZATION INTERFACE

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

- ❖ [Modify Menu](#) (page 4-12)
- ❖ [Search Form Options Screen \(Admin Only\)](#) (page 4-13)
- ❖ [Define New Search Form Screen \(Admin Only\)](#) (page 4-14)
- ❖ [Add Web Parts Menu \(Admin Only\)](#) (page 4-14)
- ❖ [Add Web Parts \(Browse\) Screen \(Admin Only\)](#) (page 4-15)
- ❖ [Add Web Parts \(Search\) Screen \(Admin Only\)](#) (page 4-16)
- ❖ [Add Web Parts \(Import\) Screen \(Admin Only\)](#) (page 4-17)
- ❖ [Modify Web Parts Screen](#) (page 4-17)
- ❖ [Change Page Title Screen \(Admin Only\)](#) (page 4-18)
- ❖ [Change Navigation Tree Screen](#) (page 4-19)
- ❖ [Change Search Criteria Screen](#) (page 4-20)
- ❖ [Change Search Results Screen](#) (page 4-21)
- ❖ [Layout and Advanced Screen](#) (page 4-22)

Modify Menu



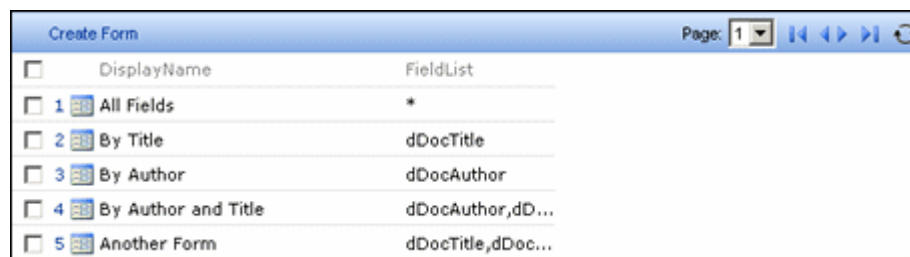
The Modify Menu is used to customize the appearance of the web parts page. If you select **Shared View**, the **Design this page** option is grayed out because that is only available to individual users. In addition, the **Modify My Web Parts** option is changed to Modify Shared Web Parts.

To access this menu, click **Modify Shared Page** or **Modify My Page** in the [Page Header](#) (page 3-14).

The following options are available on this menu:

- ❖ **Add Web Parts:** Used to add additional web parts to the page. See [Adding Web Parts \(Admin Only\)](#) (page 4-4) for details.
- ❖ **Design This Page:** Used to rearrange elements on the page. See [Designing the Page](#) (page 4-11) for details.
- ❖ **Modify My|Shared Web Parts:** Used to modify specific sections of the page. See [Modifying Web Parts](#) (page 4-5) for details.
- ❖ **Shared View (Admin Only):** Used to specify that any changes made will take place to the shared view.
- ❖ **Personal View:** Used to specify that any changes made will take place to the user's personal view.

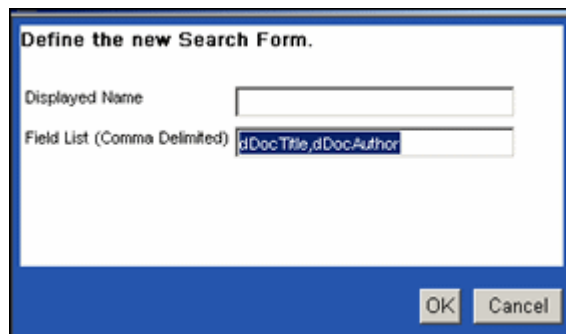
Search Form Options Screen (Admin Only)



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](#) (page 3-15). The Search Form Options Screen is displayed in the [Main Page Search Section](#) (page 3-17).

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

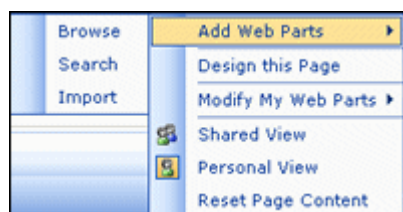
Define New Search Form Screen (Admin Only)



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 \(Admin Only\)](#) (page 4-13). See [Designing Custom Search Forms \(Admin Only\)](#) (page 4-3) for details about creating a custom search form.

Add Web Parts Menu (Admin Only)



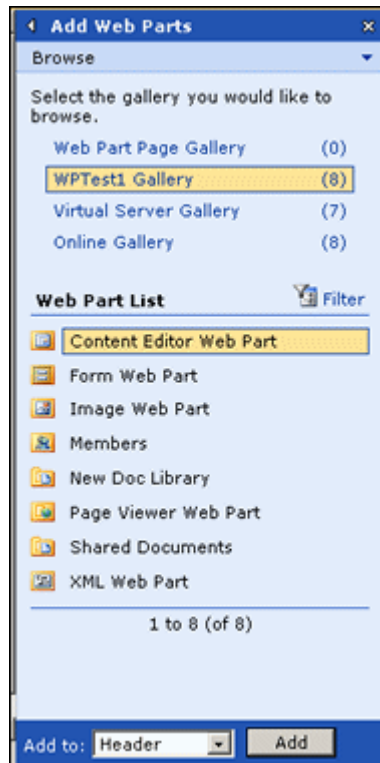
The Add Web Parts Menu is used to change the web parts available on the [Main Page](#) (page 3-14).

To access this menu, click **Add Web Parts** on the [Modify Menu](#) (page 4-12) near the top of the [Main Page](#) (page 3-14).

The following options appear on this menu:

- ❖ **Browse:** Opens the [Add Web Parts \(Browse\) Screen \(Admin Only\)](#) (page 4-15) where you can browse for parts to add to the page.
- ❖ **Search:** Opens the [Add Web Parts \(Search\) Screen \(Admin Only\)](#) (page 4-16) where you can enter search terms to find parts to add to the page.
- ❖ **Import:** Opens the [Add Web Parts \(Import\) Screen \(Admin Only\)](#) (page 4-17) where you can browse for parts outside your site then upload them to the page.

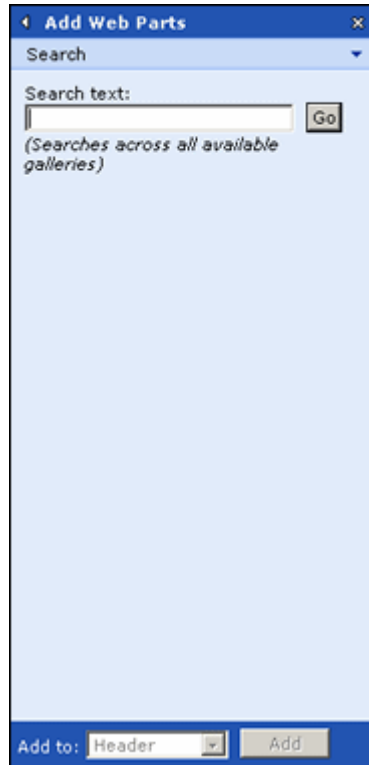
Add Web Parts (Browse) Screen (Admin Only)



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 **Add Web Parts** on the [Modify Menu](#) (page 4-12). Select **Browse** from the [Add Web Parts Menu \(Admin Only\)](#) (page 4-14).

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 **Add Web Parts** on the [Modify Menu](#) (page 4-12). Select **Search** from the [Add Web Parts Menu \(Admin Only\)](#) (page 4-14).

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 **Add Web Parts** on the [Modify Menu](#) (page 4-12). Select **Import** from the [Add Web Parts Menu \(Admin Only\)](#) (page 4-14).

Modify Web Parts Screen



The Modify Shared Web Parts|Modify My Web Parts screen is used to alter the web parts used on the Web Parts product page. Administrators can change the title bar on the page. All users can change the navigation tree, search criteria pane, and the search result pane.

To access this menu, click the [Modify Menu](#) (page 4-12). Select Modify My Web Parts or Modify Shared Web Parts.

Change Page Title Screen (Admin Only)



Web Part Page Title Bar

Title
DocTestSite

Caption
Site used to test this product

Description
Not for public use

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

OK Cancel Apply

The Change Page Title Screen is used to change the header information at the top of the Web Parts product page. To access this screen, click **Add Web Parts** on the [Modify Menu](#) (page 4-12) then click **Web Part Page Title Bar**.

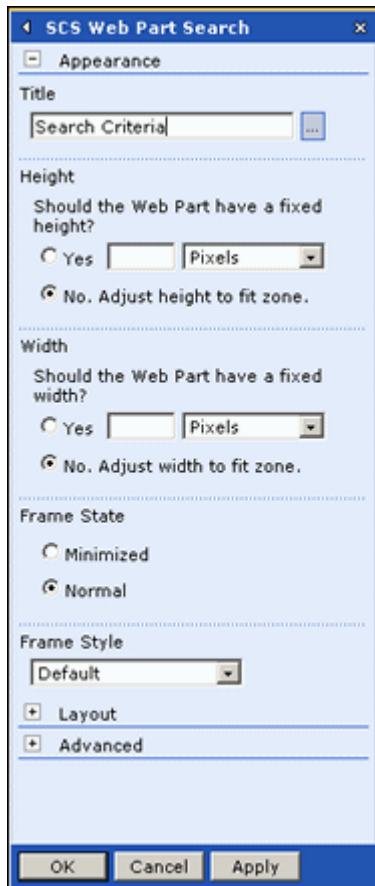
Change Navigation Tree Screen

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 **Modify Shared Web Parts** or **Modify My Web Parts** from the [Modify Menu](#) (page 4-12). Click **SCS Web Part Navigation Tree**.



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

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 **Modify Shared Web Parts** or **Modify My Web Parts** from the [Modify Menu](#) (page 4-12). Click **SCS Web Part Search**.



Note: If the Web Part Search Title has been previously changed, that title appears on the menu in place of **SCS Web Part Search**. In addition, if you unchecked **Visible on Page** on the Layout portion for the section, **(Hidden)** appears in front of the title.

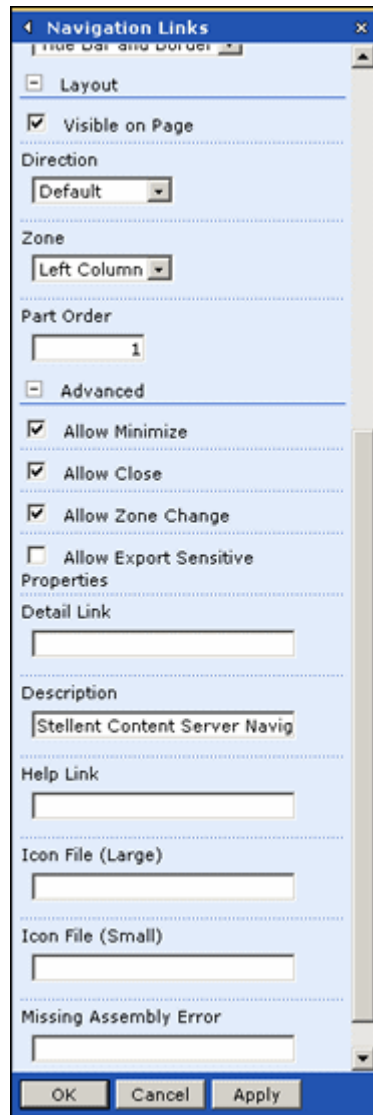
Change Search Results Screen

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 [Modify Menu](#) (page 4-12). Click **SCS Web Part Search Results**.



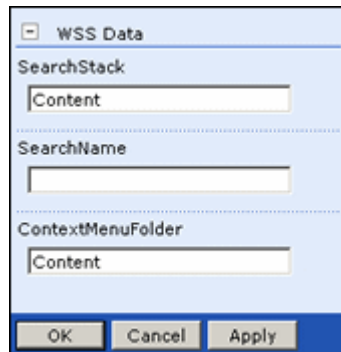
Note: If the Web Part Search Results Title has been previously changed, that title appears on the menu in place of **SCS Web Part Search Results**. In addition, if you unchecked **Visible on Page** on the Layout portion for the section, **(Hidden)** appears in front of the title.

Layout and Advanced Screen



The Layout and Advanced screen is used to set the layout of elements on the web part page. To access this screen, click the Maximize button (+) next to Layout or Advanced on a customization page.

Change WSS Data Screen

The image shows a dialog box titled "WSS Data". It contains three text input fields. The first field, labeled "SearchStack", contains the text "Content". The second field, labeled "SearchName", is empty. The third field, labeled "ContextMenuFolder", contains the text "Content". At the bottom of the dialog box, there are three buttons: "OK", "Cancel", and "Apply".

The WSS Data Screen is used to alter WSS data criteria. To access this screen, click **Modify WSS Data** from the [Change Search Results Screen](#) (page 4-21).

ADMINISTERING THE SOFTWARE

OVERVIEW

This section covers the following topics:

Concepts

- ❖ [Administration Options](#) (page 5-1)
- ❖ [Other Admin-Only Functionality](#) (page 5-3)
- ❖ [Troubleshooting](#) (page 5-4)

Tasks

- ❖ [Automatic User Logging](#) (page 5-4)
- ❖ [Using Log Files](#) (page 5-4)

Interface

- ❖ [Main Admin Screen](#) (page 5-6)
- ❖ [Log Results Screen](#) (page 5-9)

ADMINISTRATION OPTIONS

The Administration option on the [Main Navigation Tree](#) (page 3-15) is used to configure system specific elements of the Web Parts product.

When you click this option, the [Main Admin Screen](#) (page 5-6) is displayed. This Administration Screen is divided into three general categories:

- ❖ [WSS Information](#) (page 5-2)
- ❖ [Defaults](#) (page 5-2)
- ❖ [Content Server Information](#) (page 5-3)

To access this screen, log in as an administrator. Select **Administration** from the [Main Navigation Tree](#) (page 3-15). The [Main Admin Screen](#) (page 5-6) 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.

WSS Information

The following Web Support Server information can be edited on this screen:

- ❖ Web Support Server Diagnostics - Trace all available reporting points: If checked, all reporting points will be added to log files.
- ❖ Web Support Server Diagnostics - Use console output: If checked, console output will be added to log files.
- ❖ Web Support Server Diagnostics - Trace Key Points: If checked, key or main entry points into WSS are added to the log files.
- ❖ Web Support Server - Session Timeout (minutes): Sets the number of minutes until the system times out after inactivity.
- ❖ Web Support Server.Session.Store.GlobalCacheTimeoutMinutes: Sets the number of minutes until the cache times out after inactivity.
- ❖ WebSupportServer.DefaultUserSetting.WSS.Logs.PageRowCount: Sets the number of rows on a WSS log file.

Defaults

You can set several different defaults for users. These defaults are applicable for all web pages designed using the Web Parts product.

The following defaults can be set:

- ❖ Default User Setting - Content Page Row Count: Sets the default size for the number of rows used when returning search results.

- ❖ Paged Resource Retriever - Used Saved Column Widths: Sets the default column width for search columns.

Content Server Information

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

- ❖ Stellent Content Server - Web Service Connection URL: Sets the URL for the web service.
- ❖ Stellent Content Server - Trusted System User Name: Sets the administrator's login name.
- ❖ Stellent Content Server - Use Sockets: Sets how many sockets to use.
- ❖ Stellent Content Server - End Point Socket: Sets the address of the end point socket.
- ❖ Stellent.Scs.WebServiceSupport.UseProxy: If set to true, proxies are used. If set to false, proxies are not used.
- ❖ Stellent.Scs.WebServiceSupport.SystemUserName: Sets the administrator's name for WSS.

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](#) (page 5-6) where administrators can set WSS information, defaults, and content server information. See [Administration Options](#) (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 [Designing Custom Search Forms \(Admin Only\)](#) (page 4-3).

- ❖ **Logs:** Clicking this node option displays all log files that have been created. These log files can be filtered for display according to specific criteria. See [Troubleshooting](#) (page 5-4) for more details.

TROUBLESHOOTING

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

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>
```

Using Log Files

The Log files available from the [Main Navigation Tree](#) (page 3-15) can be used to assist in debugging and monitoring your Web Parts product. Follow this procedure to use log files:

1. Click **Logs** in the [Main Navigation Tree](#) (page 3-15).
2. Click Filter in the Search Results pane.
The [Log Menu Screen](#) (page 5-7) is displayed.
3. Select the type of log you want to use. The following options are available from this menu:

- **ErrorsOnly:** Error log files list the type of error received and possible corrective action.
- **Keys Only:** Key points in the log file are entry points to the Web Support Server (WSS). They denote at the highest level what calls are made into the content server. Use these log files to determine a specific location where errors are occurring.
- **Keys and Errors Only:** A Key and Error log file combines both types of log reports into one larger report.
- **Show All:** This option shows all log files not filtered by a type or a user. This can generate log files that may be too complete for easy use.
- **Activate Session Log:** Activates logging for the active session. If logging is turned off, you can use this menu item to force logging to occur for the current session. Logging continues until the user who initiated the logging logs out or until Deactivate Session Log is selected. This option has no effect if logging is turned off for the entire Web Support Server.
- **Deactivate Session Log:** Deactivates logging for the active session. If logging is turned off and you selected **Activate Session Log**, select this menu item to deactivate session logging. This menu option has no effect if logging is turned on for the entire Web Support Server.

4. Choose a log type.

The [Log Filter Screen](#) (page 5-7) is displayed.

5. Enter your filter values. Only items with values containing all the filter values will be displayed. The filter does not match your entries exactly so you can enter only part of a value if you do not know the entire value. **Click OK** when done.

The [Log Results Screen](#) (page 5-9) is displayed.



Tech Tip: When logging for all logins, set the Message Filter to **CreateSessionFor**. All logins will be displayed. Session IDs can then be determined from those entries.

6. Select a log to view by clicking on the log item number.

The [Log Details Screen](#) (page 5-8) is displayed showing metadata about the log file.

7. When done viewing the information, click **OK**.

ADMINISTRATION INTERFACE

The following screens are used by administrators to manage the Web Parts product product:

- ❖ [Main Admin Screen](#) (page 5-6)
- ❖ [Log Menu Screen](#) (page 5-7)
- ❖ [Log Filter Screen](#) (page 5-7)
- ❖ [Log Details Screen](#) (page 5-8)
- ❖ [Log Results Screen](#) (page 5-9)

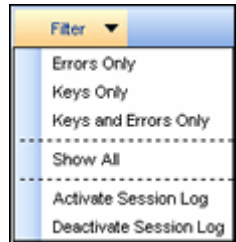
Main Admin Screen

The screenshot shows a web-based administration interface with a blue header bar containing 'Save', 'Reset WSS Cache', and 'Reset' buttons. Below the header, the page is titled 'Administration Options'. The interface lists several configuration items, each with a label and a corresponding input field or checkbox:

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

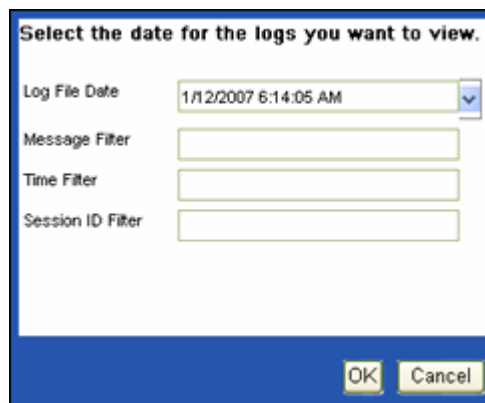
The Main Admin screen is used to set defaults and alter directory paths. To access this screen, click **Administration** from the [Main Navigation Tree](#) (page 3-15).

Log Menu Screen



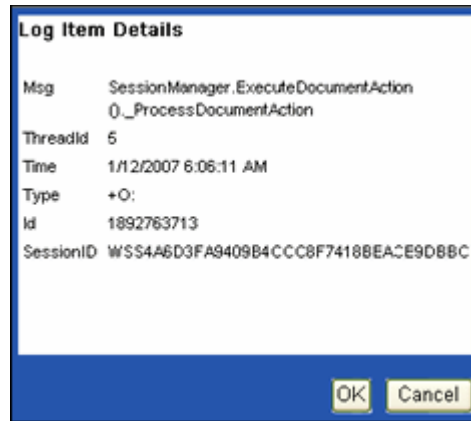
The Log Menu screen is used to select the type of log you want to generate. To access this screen, click **Log** on the [Main Navigation Tree](#) (page 3-15).

Log Filter Screen



The Log Filter Screen is used to narrow the results returned for logging. To access this screen, select a log type from the Logs menu.

Log Details Screen



The Log Details Screen is used to view metadata about a log file. To access this screen, click any log file name icon on the [Log Results Screen](#) (page 5-9).

Log Results Screen

Search Results (WSS.Logs.ShowAll-28.12.2006) Logout

View Filter Page: 1

	Msg	Time	Elapsed	ThreadId
<input type="checkbox"/>	1 Create Session	12/27/2006 4:35:1...		4
<input type="checkbox"/>	2 SessionManager.CreateSession()	12/27/2006 4:35:1...		4
<input type="checkbox"/>	3 SessionInformationStore.CreateSession-UserToken()	12/27/2006 4:35:2...		4
<input type="checkbox"/>	4 SessionInformationStore.CreateSession-UserToken().Lock List	12/27/2006 4:35:2...		4
<input type="checkbox"/>	5 SessionInformationStore.CreateSession-UserToken().Add Session	12/27/2006 4:35:2...		4
<input type="checkbox"/>	6 SessionInformationStore.CreateSession-UserToken().Add Session	12/27/2006 4:35:2...	00:00:00	4
<input type="checkbox"/>	7 SessionInformationStore.CreateSession-UserToken().Lock List	12/27/2006 4:35:2...	00:00:00	4
<input type="checkbox"/>	8 SessionInformationStore.CreateSession-UserToken().Lock Reserve ...	12/27/2006 4:35:2...		4
<input type="checkbox"/>	9 SessionInformationStore.CreateSession-UserToken().Remove Rese...	12/27/2006 4:35:2...		4
<input type="checkbox"/>	10 SessionInformationStore.CreateSession-UserToken().Remove Rese...	12/27/2006 4:35:2...	00:00:00	4
<input type="checkbox"/>	11 SessionInformationStore.CreateSession-UserToken().Lock Reserve ...	12/27/2006 4:35:2...	00:00:00	4
<input type="checkbox"/>	12 SessionInformationStore.CreateSession-UserToken()	12/27/2006 4:35:2...	00:00:00	4
<input type="checkbox"/>	13 SessionManager.CreateSession().UserActivity:WSSA8007FF68275...	12/27/2006 4:35:2...		4
<input type="checkbox"/>	14 SessionManager.CreateSession()	12/27/2006 4:35:2...	00:00:06.9538370	4
<input type="checkbox"/>	15 Create Session	12/28/2006 8:47:0...		4
<input type="checkbox"/>	16 SessionManager.CreateSession()	12/28/2006 8:47:0...		4
<input type="checkbox"/>	17 SessionInformationStore.CreateSession-UserToken()	12/28/2006 8:47:0...		4
<input type="checkbox"/>	18 SessionInformationStore.CreateSession-UserToken().Lock List	12/28/2006 8:47:0...		4
<input type="checkbox"/>	19 SessionInformationStore.CreateSession-UserToken().Add Session	12/28/2006 8:47:0...		4
<input type="checkbox"/>	20 SessionInformationStore.CreateSession-UserToken().Add Session	12/28/2006 8:47:0...	00:00:00	4
<input type="checkbox"/>	21 SessionInformationStore.CreateSession-UserToken().Lock List	12/28/2006 8:47:0...	00:00:00	4
<input type="checkbox"/>	22 SessionInformationStore.CreateSession-UserToken().Lock Reserve ...	12/28/2006 8:47:0...		4
<input type="checkbox"/>	23 SessionInformationStore.CreateSession-UserToken().Remove Rese...	12/28/2006 8:47:0...		4
<input type="checkbox"/>	24 SessionInformationStore.CreateSession-UserToken().Remove Rese...	12/28/2006 8:47:0...	00:00:00	4
<input type="checkbox"/>	25 SessionInformationStore.CreateSession-UserToken().Lock Reserve ...	12/28/2006 8:47:0...	00:00:00	4
<input type="checkbox"/>	26 SessionInformationStore.CreateSession-UserToken()	12/28/2006 8:47:0...	00:00:00	4
<input type="checkbox"/>	27 SessionManager.CreateSession().UserActivity:WSE4AF8042903D...	12/28/2006 8:47:0...		4
<input type="checkbox"/>	28 SessionManager.CreateSession()	12/28/2006 8:47:0...	00:00:00.0781330	4

The Log screens are used to view error reports. To access these reports, click **Logs** from the [Main Navigation Tree](#) (page 3-15). A list of reports is displayed in the Search Results pane. To view the report, click the report name.



MODIFYING CONFIGURATION SETTINGS

OVERVIEW

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](#) (page A-2)
- ❖ [The Web Config File](#) (page A-2)
- ❖ [The WebSupportServer.exe.config file](#) (page A-5)

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

USING THE WSS CONFIG EDITOR

The WSS Config editor is stored in c:\Program Files\stellent\wss\WSSConfigEditor.exe. You can use this editor to change configuration information for your system.

To use the editor, click on the file name. The Config Editor screen is displayed. Six tabs indicate screens of information containing configuration details that can be changed. The configuration consists of a name and value pair. 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.



Important: When you first install the software, the system password is not encrypted. Use the Settings tab to encrypt the password used for the system.

The remainder of this chapter discusses the different settings which can be changed. Many of these can be changed in the configuration editor, and where 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 changed in configuration files.

See the [Configuration Interface Screens](#) (page A-12) for screen shots of the WSS Config Editor configuration screens that can be used to change configuration settings.

THE WEB CONFIG FILE

The Web.Config file is used to configure the Web App 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](#) (page A-3)
- ❖ [EmailServerName](#) (page A-3)
- ❖ [ErrorEmailRecipients](#) (page A-3)
- ❖ [DiagnosticSetting.Logging](#) (page A-4)
- ❖ [DiagnosticSetting.Timer](#) (page A-4)

- ❖ [DefaultUserTheme](#) (page A-5)

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>
```

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>
```

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;"; />  
    ...
```

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" />  
    ...
```

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" />  
    ...
```

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>
```

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](#) (page A-6)
- ❖ [Profile Proxies Users](#) (page A-6)
- ❖ [Activation Stack](#) (page A-6)
- ❖ [Navigation Tree Content](#) (page A-7)
- ❖ [Search Stack Definitions](#) (page A-8)
- ❖ [User Log Definitions](#) (page A-10)
- ❖ [App Settings](#) (page A-11)

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>
```

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>
```

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.IBPM.Web.WebSupportServerObjects.
ActivationProviders.WebSupportSessionIdProvider,WebSupportServerObjects"
Configuration="WebSupportUserName=IBPMUserName;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>

```

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>

```

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.IBPM.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.IBPM.Web.WebSupportServerObjects.Folder
    Filters.FilterAndOrderFields"
    ResultsListPageFilterConfig="ColumnList=DisplayName,FieldList;UseOrder=1" />
  <add Name="WSS.Logs"
    ResultsListSourceType="Stellent.IBPM.Web.WebSupportServerObjects.
    ResultsListSources.WSSLogViewer"
    CreateResultsListWhenMissing="true" ResultsListPageFilterType=
    "Stellent.IBPM.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.IBPM.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.IBPM.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.IBPM.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.IBPM.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.IBPM.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.
    SCSContributionFolder ResultsList, Stellent.Wss.Scs"
    ResultsListPageFilterType=
    "Stellent.IBPM.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.IBPM.Web.WebSupportServerObjects.FolderFilters.FilterAndOrderFields"
    ResultsListPageFilterConfig="ColumnList=
    dStatus,dInDate,dOutDate,dStatus,dRevision
    ID;UseOrder=1" CreateResultsListWhenMissing="true" />
</Items>
</SearchStackDefinitions>

```

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>

```

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" />
```

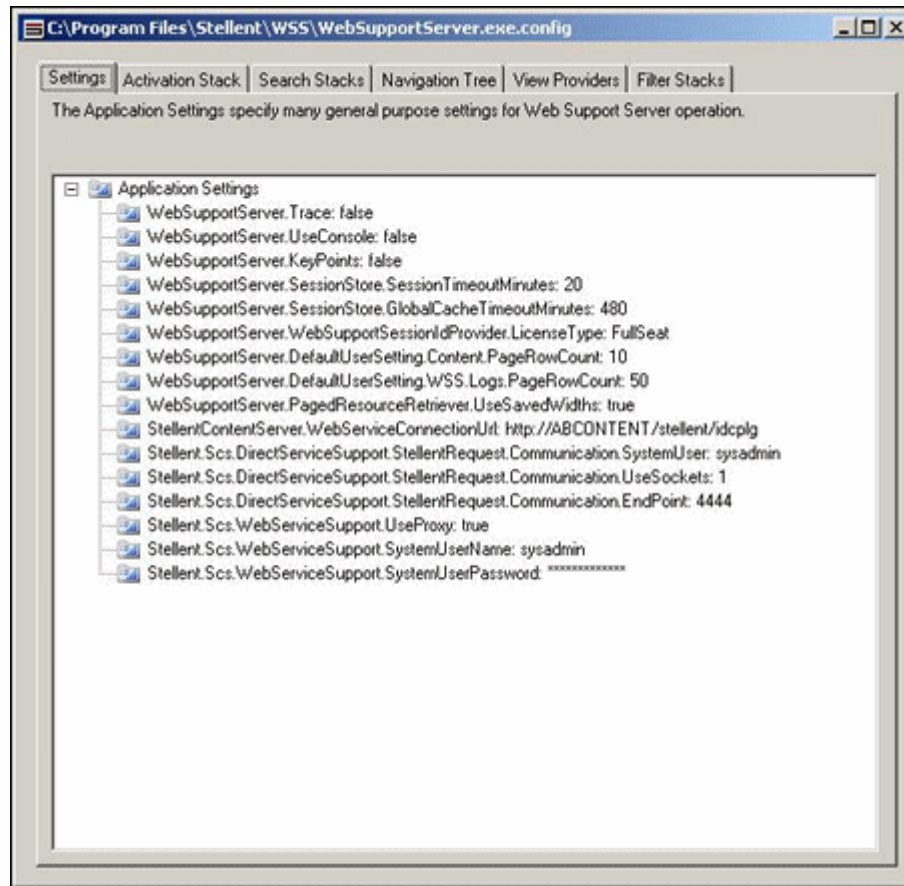
```
<!-- Stellent Content Server Settings - This is the Content Server port used  
to communicate through the socket layer to content server -->  
<add key="Stellent.Scs.DirectServiceSupport.StellentRequest.Communication.  
EndPoint" value="4444" />
```

CONFIGURATION INTERFACE SCREENS

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

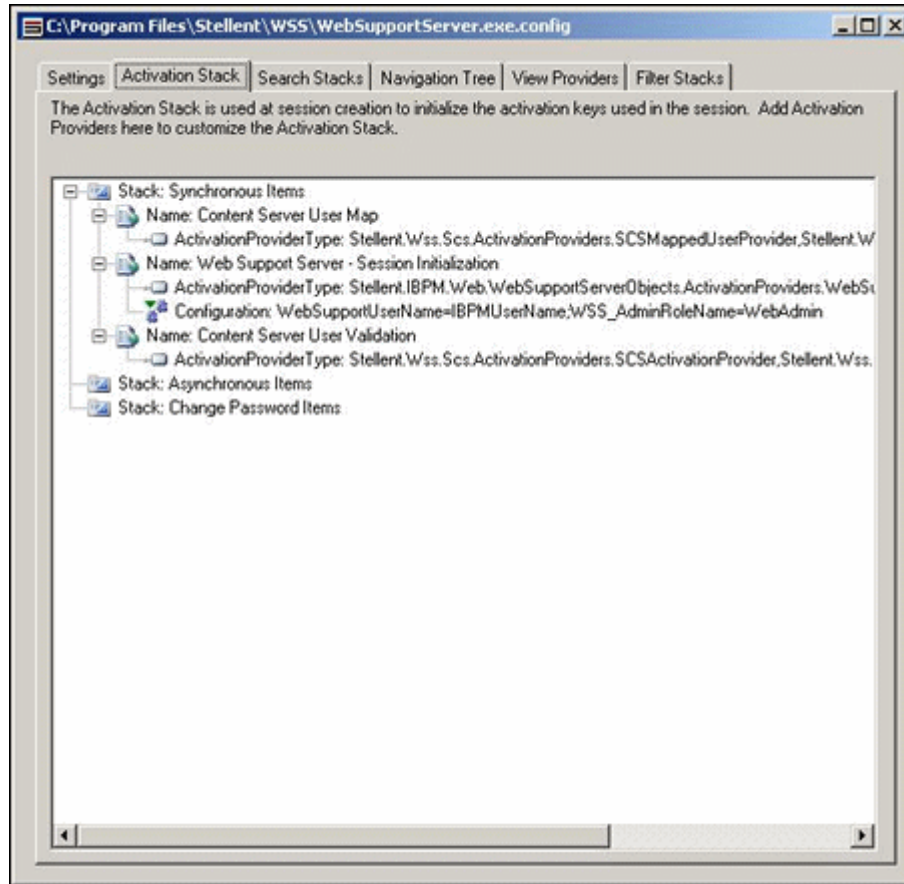
- ❖ [Application Settings Screen](#) (page A-13)
- ❖ [Activation Stack Screen](#) (page A-14)
- ❖ [Search Stack Screen](#) (page A-15)
- ❖ [Navigation Tree Screen](#) (page A-16)
- ❖ [View Providers Screen](#) (page A-17)
- ❖ [Filter Stacks Screen](#) (page A-18)

Application Settings Screen



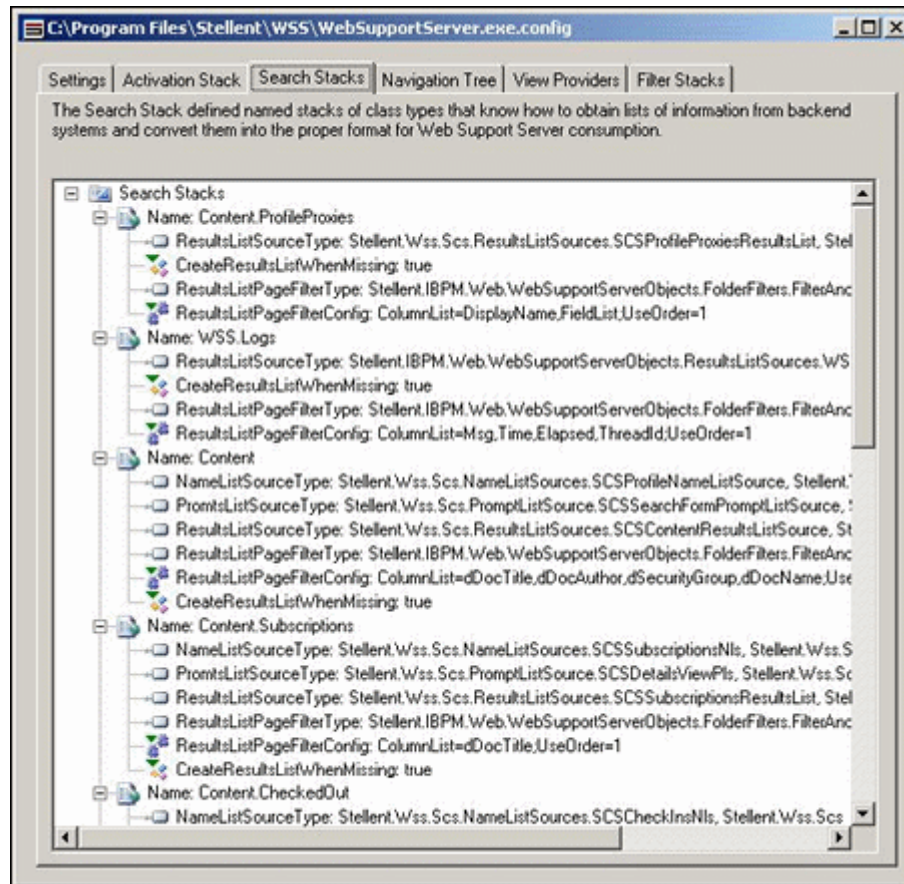
The Application Settings screen is used to change configuration values for the session timeout, the connection URL for the Content Server and other configuration for Web Support Server operation. To access this screen, click the **Settings** tab on the WSS Config Editor window.

Activation Stack Screen



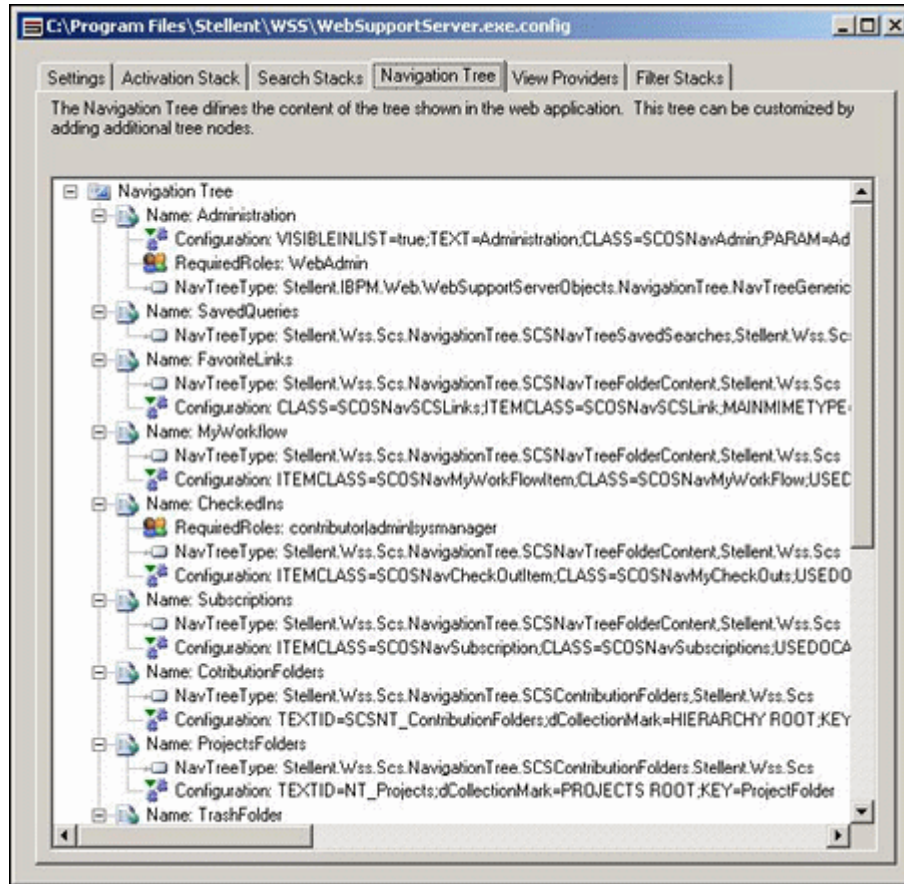
The Activation Stack screen is used to initialize the activation keys and customize the Activation Stack. To access this screen, click the **Activation Stack** tab on the WSS Config Editor window.

Search Stack Screen



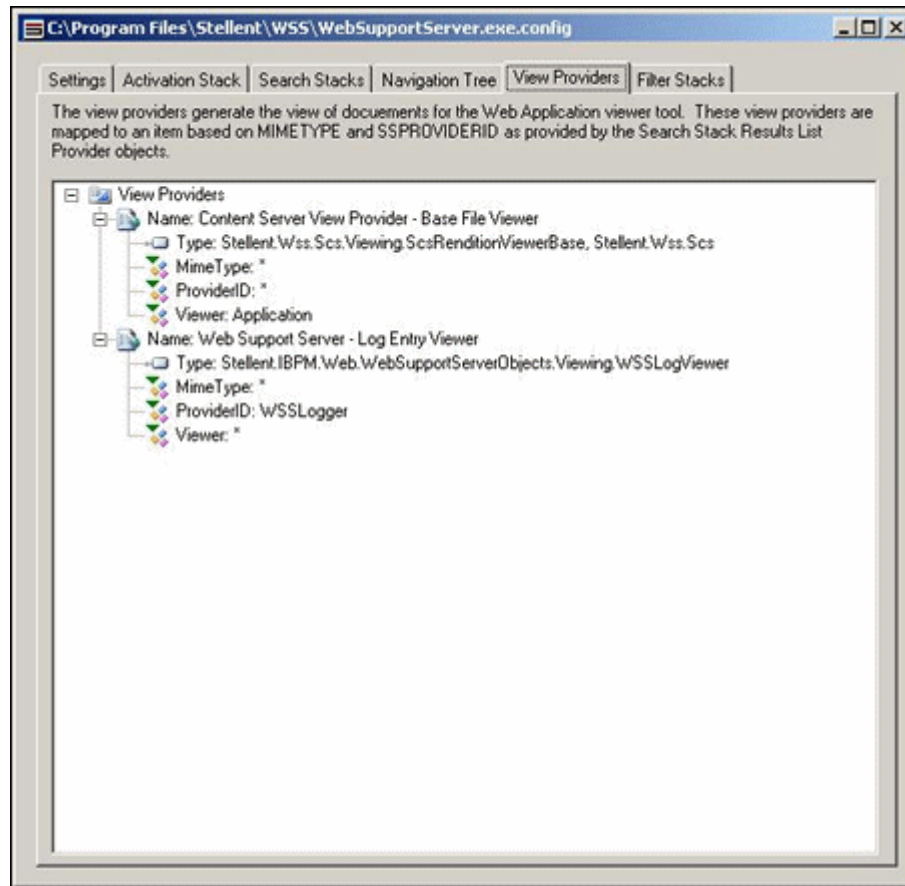
The Search Stack screen defines the named stacks of class types used to obtain information from the back end system. To access this screen, click the **Search Stack** tab on the WSS Config Editor window.

Navigation Tree Screen



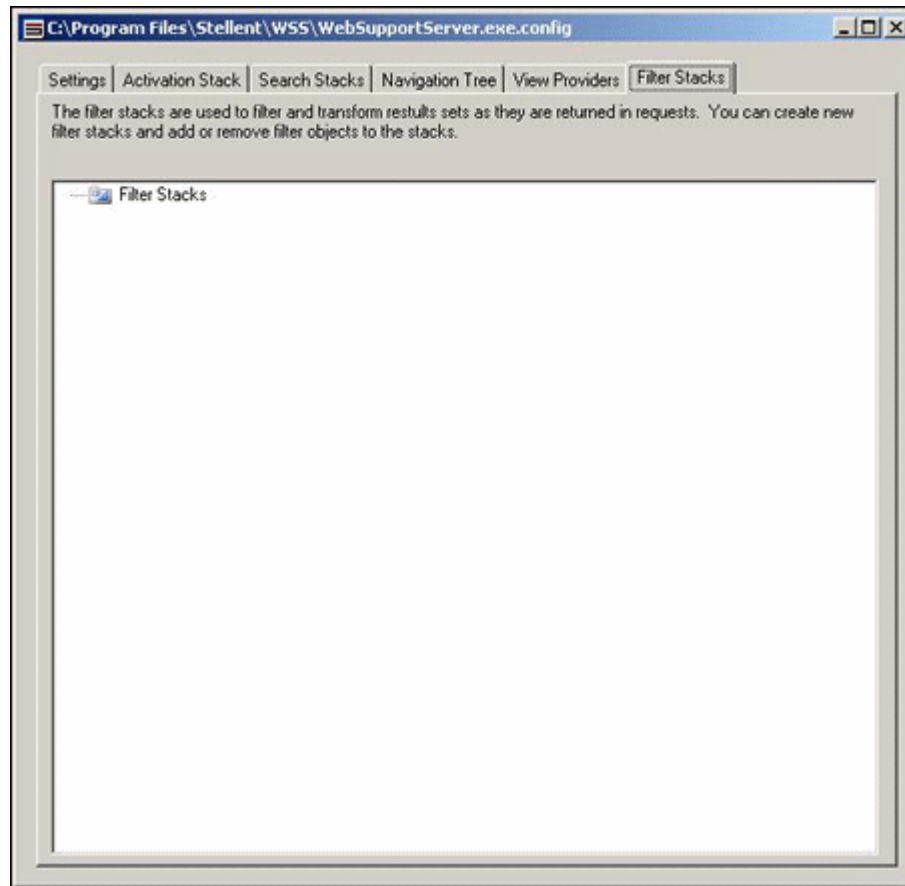
The Navigation Tree screen defines the content of the Navigation list shown in the web application. You can customize this tree by adding or removing nodes. To access this screen, click the **Navigation Tree** tab on the WSS Config Editor window.

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.

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.

B

THIRD PARTY LICENSES

OVERVIEW

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

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- ❖ [W3C® Software Notice and License](#) (page B-2)
- ❖ [Zlib License](#) (page B-4)
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ZLIB LICENSE

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

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