# Oracle® WebCenter Console for SharePoint

Administrator Guide

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CHAPTER 1

# Welcome

This guide is written for administrative users who are responsible for managing Oracle Webcenter Console for SharePoint content in the portal.

This guide describes how to perform initial and ongoing Oracle Webcenter Console for SharePoint administrative tasks. When you first install Oracle Webcenter Console for SharePoint, you can use this guide to perform the following setup tasks:

1. Create and configure content sources.
2. Create and configure content crawlers.

When you have completed your initial Oracle Webcenter Console for SharePoint installation, you can use this guide as a reference for tasks that you repeat or tasks that do not apply during initial installation but might apply later when you extend your base Oracle Webcenter Console for SharePoint installation.

# Typographical Conventions

This book uses the following typographical conventions.

**Table 1-1 Typographical Conventions**

| Convention | Typeface | Examples/Notes |
|---|---|---|
| • Items you need to take action on (such as files or screen elements) | **bold** | • Upload **Procedures.doc** to the portal.<br>• To save your changes, click **Apply Changes**. |
| • User-defined variables<br>• New terms<br>• Emphasis<br>• Object example names | *italic* | • The migration package file is located in *install_dir*\serverpackages.<br>• *Portlets* are Web tools embedded in your portal.<br>• The URI *must* be a unique number.<br>• The example Knowledge Directory displayed in Figure 5 shows the *Human Resources* folder. |
| • Text you enter<br>• Computer generated text (such as error messages)<br>• Code samples | `computer` | • Type `Marketing` as the name of your community.<br>• This script may generate the following error: `ORA-00942 table or view does not exist`<br>• Example:<br>`<setting name="SSOCookieIsSecure">`<br>`<value xsi:type="xsd:integer">0</value>`<br>`</setting>` |
| • Environment variables | ALL_CAPS | • ORACLE_HOME specifies the directory where Oracle products are installed. |

# Oracle Documentation and Resources

This section describes other documentation and resources provided by Oracle.

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

| Resource | Description |
|---|---|
| Installation and Upgrade Guide | This guide describes the prerequisites (such as required software) and procedures for installing or upgrading Oracle Webcenter Console for SharePoint.<br>It is available on the Oracle Technology Network at http://download.oracle.com/docs/cd/E13158_01/alui/integration/sharepointconsole/docs103/index.html and on any physical media provided for delivering the application. |
| Release Notes | The release notes provide information about new features, issues addressed, and known issues in the release.<br>They are available on the Oracle Technology Network at http://download.oracle.com/docs/cd/E13158_01/alui/integration/sharepointconsole/docs103/index.html and on any physical media provided for delivering the application. |
| Online Help | The online help is written for all levels of Oracle Webcenter Console for SharePoint users. It describes the user interface for Oracle Webcenter Console for SharePoint and gives detailed instructions for completing tasks in Oracle Webcenter Console for SharePoint.<br>To access online help, click the help icon. |
| Oracle Technology Network (OTN) | The Oracle Technology Network is the world's largest community of developers, DBAs, and architects using Oracle products and industry-standard technologies. Every day, members collaborate via OTN to share real-world insight, expertise, and best practices on how to build, deploy, manage, and optimize applications.<br>As a member of the Oracle Technology Network you will enjoy access to software downloads, discussion forums, documentation, wikis, podcasts, blogs, plus much more.<br>Access the Oracle Technology Network at http://www.oracle.com/technology/index.html. |
| Oracle Support | The Oracle Support site provides access to all Oracle support resources including online support, software and patches, technical articles, and contact numbers.<br>Access the Oracle Support site at http://www.oracle.com/support/index.html. |

CHAPTER 2

# Crawling and Indexing SharePoint Items

This chapter discusses how to use Oracle Webcenter Console for SharePoint to crawl and index SharePoint items within your portal. This is accomplished by creating the following objects within the portal:

1. One or more content sources using the SharePoint CWS Web service.
2. One or more crawlers using your created content source.
3. One or more jobs to run the crawlers.

## Introduction

Oracle Webcenter Console for SharePoint allows you to crawl and index items from a Microsoft Office SharePoint Server (MOSS) or Windows SharePoint Services (WSS) site or site collection. It also allows you to crawl a list of MOSS or WSS sites specified by an RSS feed. Crawling SharePoint items into your portal requires the configuration of a content source, a crawler, and a job. Depending on your needs, more than one content source and/or crawlers may need to be created.

A SharePoint content source is configured with authentication information and default clickthrough behavior. The authentication information is the Windows credentials necessary to access the desired SharePoint site or site collection. If multiple sites are accessible with the same authentication credentials, only one SharePoint content source is required. If sites require different authenticating credentials, create an SharePoint content source for each set of credentials.

Each SharePoint content source can have one or more SharePoint crawlers associated with it. A SharePoint crawler describes which SharePoint site or site collection is to be crawled, what to crawl on that SharePoint site, and where the crawled items should be put. Note that the crawler does not import the SharePoint items themselves, but rather indexes them within the portal.

# Creating a SharePoint Content Source

Oracle Webcenter Console for SharePoint comes with a default content source, **SharePoint Content Source**, that can be updated with your MOSS or WSS information. To create a SharePoint content source:

1. In portal Administration, go to the folder where you want to create the SharePoint content source.
2. From the **Create Object…** drop-down, select **Content Source - Remote**.
3. In the **Choose Web Service** dialog box, select the **SharePoint CWS Web Service** and click **OK**.
4. In the URL Type section, select **Does not use the Gateway to open documents**.

   **Caution:** The portal cannot gateway SharePoint documents. The gateway interferes with authentication and WebDAV features of SharePoint.

5. Under SharePoint User Settings, enter the login information for a user that has access to all of the SharePoint content that you wish to crawl into the portal. If the crawler will use a site feed, the user must have access to each of the sites specified by the site feed.

   When the crawler accesses the desired SharePoint site, it will run as this user. The user must have the following rights on the site:

   – **Microsoft Office SharePoint Server 2007**: Browse Directories, Manage Lists, Use Remote Interfaces

   – **Windows SharePoint Services 2.0**: Browse Directories, Manage List Permissions

   – **Windows SharePoint Services 3.0**: Browse Directories, Manage Lists, Use Remote Interfaces

     To crawl Form Template folders in MOSS 2007 and WSS 3.0, the View Application Pages and View Versions rights are also required.

   **Note:** The authentication information configured in the content source is used only by the crawler. These credentials will not be passed to the SharePoint site when a user clicks

on an item in the portal. Authentication of the user to access that item is handled by MOSS or WSS.

6. Choose **Document Clickthrough Settings** from the menu on the left.

   Select the radio button next to the default clickthrough behavior you would like for SharePoint documents. Clicking on a SharePoint document can either open the document directly, or take the user to the SharePoint properties page for that document. This setting affects clickthrough behavior in the Knowledge Directory, general search results, the Most Recently Used SharePoint Items portlet, and the default mode of the SharePoint Search portlet. When the Most Recently Used SharePoint Items portlet is used in a community, community preferences can be used to change the clickthrough behavior.

   **Note:** This setting only affects documents. All other SharePoint items open their default display page which is the properties page.

7. Click **Finish** to name and save the content source.

# Creating SharePoint Crawlers

Once you have created one or more SharePoint content sources, you can create SharePoint crawlers:

1. In portal Administration, go to a folder where you want to create the SharePoint crawler.
2. From the **Create Object…** drop-down, select **Content Crawler – Remote**.
3. In the **Choose Content Source** dialog box, select the content source you created.

4. On the **Main Settings** page, configure the SharePoint crawler settings:

**Table 2-1 Oracle Webcenter Console for SharePoint Crawler Configuration - Main Settings**

| Setting | Description |
|---|---|
| **Crawler Configuration Settings** | |
| SharePoint Site | Select **Site URL** to crawl a SharePoint site or site collection. Type the URL of the site that you wish to crawl and click **Validate**. This URL should end in "/".<br>– The crawler will validate that the URL entered is a valid SharePoint site or site collection and display the name of the starting subsite. If the URL entered does not end in "/" but a valid site collection can be extracted from the URL, the crawler will discard any extraneous trailing information from the URL and update the URL shown in the UI accordingly.<br>– The subsite name may be listed as "/" if the starting site is the root site of the site collection itself. If the starting SharePoint URL points to a subsite of the site collection, the subsite will be listed.<br>Select **Feed** to crawl a list of WSS sites specified by an RSS feed. Type the path to the site feed.<br>– The path must return a valid RSS 2.0 document. For more information about crawling RSS feeds, see "Crawling RSS Site Feeds" on page 2-6. |

**Table 2-1 Oracle Webcenter Console for SharePoint Crawler Configuration - Main Settings**

| Setting | Description |
|---|---|
| Crawl Depth | Select the depth of the crawl.<br>It is recommended that you choose **Selected Site and All Subsites** to simplify indexing of SharePoint sites. If you do not choose this setting, you will have to create a separate crawler for each subsite. You should choose **Selected Site Only** if you want to tightly control what SharePoint sites are indexed. |
| **Destination Folders** | |
| Folder Path | Select the folder or folders where you would like to import SharePoint content. |
| Settings | Select how you would like to import the SharePoint items.<br>It is recommended that you choose to mirror the folder structure, approve imported documents, and import security. If you choose to mirror the folder structure, the crawler will mirror the SharePoint site structure. Importing security means that only those users who can view the source item in MOSS or WSS can see the corresponding document in the portal and search results. For more information on importing security, see the *Administrator Guide for Oracle WebCenter Interaction*. |
| **Document Access Privileges** | Specify the access rights for the imported content. |

5. On the **List Settings** page, check the box next to each type of SharePoint item you want to crawl. To crawl documents attached to attached to the list items, select **Crawl documents attached to list items**.
6. On the **Document Settings** page, specify how documents should be expired and refreshed when you run the crawler.

   You can use the **Document Expiration** settings, along with the select **Apply these settings to existing documents created by this crawler** option, to delete all documents previously crawled by this crawler.

   For more information about the Document Settings page, see the Oracle WebCenter Interaction online help.
7. On the **Content Type** page, specify how content types should be assigned to the documents imported into the Knowledge Directory.

For more information about content types, see the *Administrator Guide for Oracle WebCenter Interaction* or the Oracle WebCenter Interaction online help.

8. On the **Advanced Settings** page, select settings for content language, handling of documents rejected by the crawler, handling of documents previously crawled into the Knowledge Directory, and runtime configuration. The settings available here will vary depending on whether or not you chose to mirror the source folder structure.

   For more information about advanced crawler settings, see the Oracle WebCenter Interaction online help.

9. On the **Set Job** page, assign or create a job to run this crawler.

   You must also register the administrative folder that contains the job with the Automation Service.

   For more information about setting up crawler jobs, see the *Administrator Guide for Oracle WebCenter Interaction* or the Oracle WebCenter Interaction online help.

# Crawling RSS Site Feeds

In addition to crawling SharePoint sites and site collections, SharePoint content crawlers can also be used to import content from a list of sites provided by an RSS feed.

The path to a site feed can be a URL (http://, file:///), a local file path on the SharePoint machine (c:\feed.xml), or a UNC file path on the SharePoint network (\\server\feeds\feed.xml). Secured sites (https://) and FTP sites (ftp://) cannot be crawled.

The Oracle Webcenter Console for SharePoint installer creates a virtual directory named **SiteFeed** that can be used to deploy a simple RSS feed. For example, you can put a well-formed, valid XML feed document or an .aspx file that generates a site feed into the sitefeed folder on the file system and then access it via HTTP.

The site feed document should conform to the RSS 2.0 specification. The link element of each item must contain the URL to a valid SharePoint site. The title element of an item is optional. If provided, it should be a valid Knowledge Directory folder name, as it will be used as the Knowledge Directory folder name for the site for a mirroring crawl. If the title element is omitted, the folder name will be retrieve from the SharePoint site for a mirroring crawl.

Example site feed document:

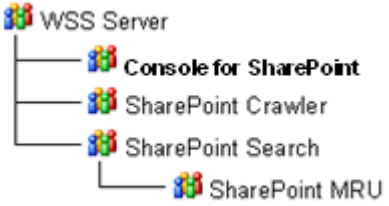
```
<?xml version="1.0" encoding="utf-8" ?>
<rss version="2.0">
        <channel>
                <title>SharePoint Site List</title>
                <link>#</link>
               <description>List of SharePoint sites to be crawled by Oracle WebCenter Console for SharePoint </description>
                <item>
                   <title>MOSS TeamSite at mySPServer:17938/sites/MainSiteCollection</title>
                        <link>http://mySPServer:17938/sites/MainSiteCollection/</link>
                </item>
                <item>
                        <link>http://SharePointServer:9167/</link>
                </item>
        </channel>
</rss>
```

# Representing SharePoint Items in the Portal

SharePoint items crawled into the portal are represented as standard portal folders and documents, and can be viewed and accessed like any other document that has been imported into the portal. The SharePoint crawler does apply some special properties to SharePoint items to help differentiate them from other items.

## SharePoint Site Structure and Portal Knowledge Directory Folders

Assume your SharePoint site is structured as depicted below. In addition to the subsites represented by each node, each site by default also contains announcements, discussions, documents, events, and tasks.




If the crawler was set to mirror folder structure of the SharePoint site, each SharePoint site is represented as a folder with the prefix **[Site]**, differentiating folders representing SharePoint sites from folders representing SharePoint list types. Each **[Site]** folder contains subfolders for each

list type found on that SharePoint site. For example, all documents in the **SharePoint Crawler** site are located in the **Shared Documents** folder under the **[Site] SharePoint Crawler** site folder.

If the crawler is configured not to mirror the source folder structure, all of the items will be stored in the same folder. SharePoint site or list item type subfolders will not be created.

# SharePoint Items and Portal Documents

In addition to crawling in document properties, the SharePoint crawler adds special SharePoint specific properties to SharePoint content crawled into the portal. This facilitates searching for SharePoint items in the portal. The properties added are:

- **WSS Document URL** – The URL of the item in the SharePoint site.
- **WSS Icon** – Used to display appropriate SharePoint icon in the portal.
- **WSS Last Modified** – The date and time the SharePoint item was last modified in SharePoint.
- **WSS Object Type** – The type of SharePoint item represented by this document.
- **WSS Property Page URL** – The URL of the properties page of the item in the SharePoint site. This value is the same as the WSS Document URL for all SharePoint items except for documents.
- **WSS Site** – The name of the host SharePoint site.

CHAPTER 4

# Accessing SharePoint Items and the Console for SharePoint Community

SharePoint items crawled into the portal can be accessed using standard portal methods, such as browsing the Knowledge Directory or using search. If a user runs a general search in the portal, they will see SharePoint items along with results from other sources.

The Console for SharePoint community is provided to allow users to run simple searches that return only SharePoint items.

## Console for SharePoint Community

The Console for SharePoint community contains portlets to search and access SharePoint items. It is meant as a starting point to access SharePoint resources; however, the Oracle WebCenter Console for SharePoint portlets are not bound to the Console for SharePoint community. The portlets can be used in any community or user My Page.

The Console for SharePoint community can be customized like any other portal community.

## SharePoint Search Portlet

The SharePoint Search portlet allows users to enter a search term and returns the results in the portlet body itself.

- The portlet displays 10 results at a time.
- The icon to the far left identifies the type of SharePoint item that is returned.
- The Name column displays the name of the document as stored in the portal.

- The Site column displays the SharePoint site where the source item is stored.
- The details icon always points to the properties page of the SharePoint item regardless of the click-through setting of the associated content source or portlet itself.
- The **Next>>** link at the bottom right pages to the next 10 results.

# Opening SharePoint Items Through the Portlet

When users click on the name of a SharePoint item in the portlet, the SharePoint item is opened using the WSS Document URL property. How the SharePoint item is finally displayed is controlled by MOSS or WSS and not the portal. Security is also handled by the interaction of the browser and MOSS or WSS and is not controlled by the portal or portlet.

**Note:** This portlet does **not** follow the Document Display Options setting in My Account -> Display Options. This is to mimic the behavior of WSS and MOSS more closely.

## SharePoint Search Portlet and Overriding Click-through Options

If the SharePoint Search portlet is accessed through a community, the portlet can be configured to override the clickthrough behavior specified in the SharePoint content source and set by the crawler. This can be set in the portlet's community preferences.

Since this a community preference, the setting can be different for each community where this portlet is used. This setting only applies when the portlet is accessed from a community: if the portlet is on a My Page, it will follow the setting on the documents' content source.

## Customizing the SharePoint Search Portlet

The SharePoint Search portlet is essentially a pre-concerted advanced search portlet that allows end users to specify the actual search term. These search settings can be configured via the administrative preferences of the SharePoint Search portlet. The search settings can be modified to meet the specific needs of the deployment.

While most of the criteria that can be specified are the same as in an advanced search, the default WSS Site criteria is special to this portlet. The criteria "**WSS Site Contains Text**" indicates that only items where the value WSS Site is not blank are returned. The SharePoint crawler automatically populates the WSS Site property during import. Non-SharePoint items will not have the WSS Site value populated. If this criteria is removed, searches from this portlet will return non-SharePoint items as well.

Results can be narrowed even further by adding criteria such as WSS Object Type. For example, if the criteria "**WSS Object Type Contains Document**" is added, only SharePoint documents will be returned.

Administrative preferences are specific to an instance of a portlet, and can be different for different copies of the portlet. For example, if there are five copies of the portlet object, they can all be configured to search based on different criteria.

# Most Recently Used SharePoint Items Portlet (MRU)

The Most Recently Used SharePoint Items portlet displays the last ten items that were accessed by a specific user through all SharePoint Search portlets or the MRU portlet itself. The last item accessed will be placed at the top of the list. The portlet displays the last ten items accessed by the current user, not by all users who access SharePoint items through the portal.

- The portlet displays the last ten items accessed.
- The icon to the far left identifies the type of SharePoint item that was accessed.
- The Name column displays the name of the document as stored in the portal.
- The Site column displays the SharePoint site where the source item is stored.
- The details icon always points to the properties page of the SharePoint item regardless of the click-through setting of the associated content source or portlet itself.

Clickthrough behavior is determined by the content source. The clickthrough behavior overrides settings of the SharePoint Search portlet do not apply to the MRU portlet.

**Note:** This portlet does **not** follow the Document Display Options setting in My Account -> Display Options. This is to mimic the behavior of WSS and MOSS more closely.

Even though there can be more than one SharePoint Search portlet, there should only be one MRU portlet. The MRU portlet will display the last items accessed by a user from all SharePoint Search portlets.

APPENDIX A

# Opening SharePoint Documents

The portal allows the clickthrough behavior for SharePoint documents to be either directly to the document itself or to the properties page of the document.

The default clickthrough behavior of SharePoint content sources is to open the SharePoint item's properties page. The properties page gives the end user more information and functions than opening the document directly. The SharePoint properties page gives access to the following options:

- The document can be opened and edited by clicking on the Name link.
- The document properties can be edited, the document deleted, discussion can be started, etc.
- Version information is displayed, for example user, time, and so on.
- The WSS Site and the folder that the document is located is displayed.
- The URL to go directly to the document is available in the address bar of the browser.

The drawback to clicking through to this page is that it requires an extra click by the end user to view the document.

The benefit to opening the document directly on clickthrough from the SharePoint Search or MRU portlet is that documents are displayed immediately. The drawback is that it is more difficult to determine where the document is located (which folder in which site) or perform the actions available from the properties page.

A compromise could be to set the SharePoint content source to open to the properties page and set SharePoint Search portlets to open documents directly. This allows users to access SharePoint

items from the Knowledge Directory or general search and still get the necessary SharePoint object information. Users who access the document from the SharePoint Search portlet open the document directly and can access the properties by clicking the details icon on the portlet results.

APPENDIX B

# Customizing Oracle WebCenter Console for SharePoint Portlets

The UIs of the Oracle WebCenter Console for SharePoint portlets can be controlled by a custom stylesheet that is loaded with the banner in the Console for SharePoint community. The styles that control the portlets are:

```
/* column controls */
.MRUIconColumn {width: 25px;}
.MRUNameColumn {width: 70%;}
.MRUSiteColumn {width: 30%}
.MRUPropColumn {width: 20px;}

.SearchIconColumn {width: 25px;}
.SearchNameColumn {width: 70%;}
.SearchSiteColumn {width: 30%;}
.SearchPropColumn {width: 20px;}
```

While it is not possible to add new columns, it is possible to remove columns by changing the styles. For example, to remove the “Site” column, replace the value {width: 30%} to {display: none} for that style.

The stylesheet is located in the following folder:

**PT_HOME\ptimages\imageserver\sharepoint\private\css**

You can copy the styles to your custom style sheets for use in areas where the Console for SharePoint banner is not used.

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