BEA AquaLogic SharePoint Console™

Administrator Guide

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CHAPTER 1

Welcome

This book describes how to administer the SharePoint Console 1.0.

Audience

This book is intended for portal administrators with knowledge of basic portal objects and tasks, including creating and configuring content sources, crawlers, and jobs. For more information on these tasks, see the portal administration guide appropriate for your version of the portal.

Typographical Conventions

This book uses the following typographical conventions.

Convention	Typeface	Example
• File names • Folder names • Screen elements	**bold**	• Upload **Procedures.doc** to the portal. • Open the **General** folder. • To save your changes, click **Apply Changes**.
Text you enter	`computer`	Type `Marketing` as the name of your community.

Convention	Typeface	Example
Variables you enter	*italic computer*	Enter the base URL for the Portlet Server. For example, `http://my_computer/.`
• New terms • Emphasis • Portal object example names	*italic*	• *Portlets* are Web tools, embedded in your portal. • The URI *must* be a unique number. • The example Knowledge Directory displayed in Figure 5 shows the *Human Resources* folder.

BEA Documentation and Resources

This section describes the documentation and resources provided by BEA.

Resource	Description
Installation Guide	This book describes how to install the SharePoint Console. It is available in electronic form (PDF) in the release package and the AquaLogic User Interaction Product Center.
Release Notes	These files are written for SharePoint Console administrators. They include information about new features and known issues in the release. They are available in electronic form (HTML) in the AquaLogic User Interaction Product Center.
Online Help	The online help is written for all levels of SharePoint Conosle users. It describes the user interface for SharePoint Console. To access online help, click **Help** in the upper-right corner of the banner or dialog box.

Resource	Description
AquaLogic User Interaction Support Center	The AquaLogic User Interaction Support Center is a comprehensive repository for technical information on AquaLogic User Interaction products. From the Support Center, you can access products and documentation, search knowledge base articles, read the latest news and information, participate in a support community, get training, and find tools to meet most of your AquaLogic User Interaction-related needs. The Support Center encompasses the following communities: **Technical Support Center** Submit and track support incidents and feature requests, search the knowledge base, access documentation, and download service packs and hotfixes. **Deployment Center** Find the tools you need to roll out, drive, and maintain a successful deployment. Collaborate with peers on strategic business and technical objectives, learn application best practices, download portal launch examples, and calculate your return on investment (ROI). **Product Center** Download products, read Release Notes, access recent product documentation, and view interoperability information. **Developer Center** Download developer tools and documentation, get help with your development project, and interact with other developers via discussion forums. **Education Center** Find information about available training courses, purchase training credits, and register for upcoming classes. If you do not see the Support Center when you log in to http://portal.plumtree.com, contact support@plumtree.com for the appropriate access privileges.

Resource	Description
Technical Support	If you cannot resolve an issue using the above resources, BEA Technical Support is happy to assist. Our staff is available 24 hours a day, 7 days a week to handle all your technical support needs. E-mail: support@plumtree.com Phone Numbers: U.S. and Canada+1 415.263.1696 or +1 866.262.PLUM (7586) Asia Pacific+61 2.9931.7822 Europe and U.K.+44 (0)1628 589124 France+33 1.46.91.86.79 Singapore+65 6832.7747

CHAPTER 2

Crawling and Indexing Windows SharePoint Services Items

This chapter discusses how to use the SharePoint Console to crawl and index Windows SharePoint Services items within your portal. This is accomplished by creating two objects within the portal:

1. One or more WSS content sources using the SharePoint CWS Web Service.
2. One or more WSS crawlers using your created WSS content source.

Introduction

At a minimum, crawling WSS items into your portal requires the configuration of a content source (or data source, in Plumtree Portal 5.x), a crawler, and a job. Depending on your needs, more than one content source and/or crawlers will need to be created.

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

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

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

item in the portal. For more details on clickthrough authentication, see Appendix B, "Synchronizing WSS Security and Portal Security."

Creating a WSS Content Source

To create a WSS content source:

1. In portal Administration, go to a folder where you want to create the WSS content source.
2. From the **Create Object…** dropdown, select **Content Source - Remote**.
3. On the **Choose Web Service** page select the **SharePoint CWS Web Service** and click **OK**.
4. In the URL Type section, select the radio button **"Does not use the Gateway to open documents"**.

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

5. Under SharePoint User Settings, enter the login information for a user that has access to all of the WSS site content that you wish to crawl into the portal. When the crawler accesses the desired WSS site, it will run as this user. If this user cannot access the desired WSS sites, the crawler that uses this content source will fail.
6. Choose **Document Clickthrough Settings** from the menu on the left.
7. Select the radio button next to the default clickthrough behavior you would like for WSS documents. Clicking on a WSS document can either open the document directly, or take the user to the WSS properties page for that document. This setting affects clickthrough behavior in the Knowledge Directory, general search results, the Most Recently Used SharePoint Resources portlet, and the default mode of the SharePoint Search portlets.

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

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

Creating WSS Crawlers

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

1. In portal Administration, go to a folder where you want to create the WSS crawler.
2. From the **Create Object…** dropdown, select **Content Crawler – Remote**.

3. On the **Choose Content Source** page, select the content source you created.
4. On the **Main Settings** page of the **Create Remote Content Crawler** editor, under **SharePoint Site**, enter the URL of the WSS server or site that you wish to crawl and click **Validate**.
   - The crawler will validate that the URL entered is a valid WSS site collection and display the name of the starting sub site. There can be multiple WSS site collections on a single WSS server, and each site collection can have multiple subsites.
   - The sub site name may be listed as "/" if the starting WSS site is the root site of the site collection itself. If the starting WSS URL points to a subsite of the site collection. the subsite will be listed.
5. Select the depth of the crawl. It is recommended that you choose "**Selected Site and all Subsites**" to simplify indexing of WSS 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 WSS sites are indexed.
6. Under **Destination Folders**, select the folder or folders where you would like to store the crawled WSS items.

   Note: The crawler does not import the WSS items themselves, but rather indexes them within the portal.
7. Select how you would like to import the WSS items.

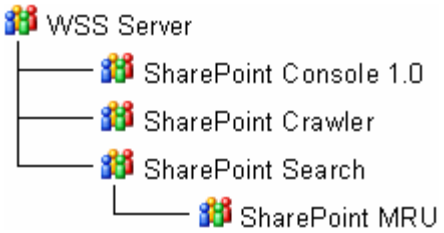
   Note: It is recommended that you choose to mirror the folder structure, approve imported documents, and import security. If you choose to mirror the folder structure, this crawler will also mirror the WSS site structure. Importing security means that only those users who can view the source item in WSS can see the corresponding document in the portal and search results. For details, see Appendix B, "Synchronizing WSS Security and Portal Security."
8. Choose **List Settings** from the menu on the left. This will take you to the **List Settings** page.
9. Check the box next to each type of WSS item you want to crawl.
10. Configure all other crawler settings as desired. These settings are standard across all crawlers. For details, see the Administration guide appropriate for your version of the portal.
11. Click **Finish** to name and save the crawler.
12. Create a job to run the crawler.

Representing WSS Items in the Portal

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

WSS Site Structure and Portal Knowledge Directory Folders

Assume your WSS server is structured as depicted to the left. Each site contains announcements, events, discussions, documents, and tasks.



If the crawler was set to mirror folder structure of the WSS site, the items will be imported as shown:

Each WSS site is represented as a folder with the prefix **[Site]**, differentiating folders representing WSS sites from folders representing WSS list types. Each **[Site]** folder contains subfolders for each list type found on that WSS site. For example, all documents in the **SharePoint Crawler** WSS site are located in the **Shared Documents** folder under the**[Site] SharePoint Crawler** site folder.

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

WSS Items and Portal Documents

In addition to crawling in document properties, the WSS crawler also tags crawled in portal documetns with special WSS specific properties. This facilitates searching specifically for WSS items in the portal. The properties added are:

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

CHAPTER 4

Accessing WSS Items and the SharePoint Console

WSS 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 WSS items along with results from other sources.

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

SharePoint Console

The SharePoint Console is a community that contains portlets to search and access WSS items. It is meant as a starting point to access WSS resources; however, the SharePoint Console portlets are not bound to the console community. The portlets can be used in any community or user MyPage.

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

SharePoint Search

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 WSS item that is returned.
- The Name column displays the name of the document as stored in the portal.

- The Site column displays the WSS site where the source item is stored.
- The  details icon always points to the properties page of the WSS 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 WSS Items Through the Portlet

When users click on the name of a WSS item in the portlet, the WSS item is opened using the WSS Document URL property. How the WSS item is finally displayed controlled by WSS and not the portal. Security is also handled by the interaction of the browser and WSS itself 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 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 behavoir specified in the WSS 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 MyPage, it will follow the setting on the documents' content source.

Customizing the SharePoint Search Portlet

The SharePoint Search portlet is essentially a preconfigured 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 WSS crawler automatically populates the WSS Site property during import. Non-WSS items will not have the WSS Site value populated. If this criteria is removed, searches from this portlet will return non-WSS 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 WSS 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 Most Recently Used 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 WSS items through the portal.

- The portlet displays the last ten items accessed.
- The icon to the far left identifies the type of WSS item that was accessed.
- The Name column displays the name of the document as stored in the portal.
- The Site column displays the WSS site where the source item is stored.
- The  details icon always points to the properties page of the WSS 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 override settings of the SharePoint Search portlet do not apply to the Most Recently Used 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 more closely.

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

APPENDIX A

Opening Documents Directly vs. Opening the Properties Page

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

The default clickthrough behavior of WSS content sources is to open the WSS item's properties page. The the properties page gives the end user more information and functions that simply opening the document directly. The WSS 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 e.g. user, time, etc.
- 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 click-through from the SharePoint Search or Most Recently Used Portlets 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 WSS content source to open to the properties page and set the SharePoint Search portlets to open documents directly. This allows users to access WSS items from the Knowledge Directory or general search and still get the necessary WSS object

information. Users who access the WSS document from the SharePoint Search portlet open the document directly and access the properties just as quickly by clicking the details icon on the portlet results.

APPENDIX B

Synchronizing WSS Security and Portal Security

An important concept to remember when importing security from WSS, or from any content repository, is that source security and portal security do not mean the same thing. For example, if a user has Administrator rights on a document in the portal, the user does not necessarily have administrator rights on the document in WSS. The Administrator right on a portal document means that the user can manage the properties of the document in the portal; however, since the document is just a point to the source document in WSS, changing the document in the portal does not change the source WSS document in any way. Deleting the document in the portal does not delete the document in WSS. This is important in understanding how ACLs are applied when importing the security of source documents.

When the crawler imports the security of an item in WSS into the portal, the crawler will give all users who can at least see the item in WSS, regardless of the actual level, the same Read right on the corresponding document in the portal. If the user does not have any rights to the item in WSS, the crawler will not give that user any rights to the document in the portal. When a user clicks on the document in the portal, the user is passed to WSS which will perform its own authentication and authorization of the user.

For example, if a user has administrator rights on a WSS document, and the crawler import security of the each document:

- That user will have Read rights to the corresponding document in the portal.
- When the user clicks through to the document, WSS will authenticate the users and give that user administrator rights on the document in WSS.

APPENDIX C

WSS and Authentication on Clickthrough

It is important to remember when accessing a WSS item through the portal, it is as if a user simply pastes the URL to the WSS item in a browser. Authentication of the user into WSS to access that item is handled entirely by WSS; however, how WSS handles authentication is dependent on both the configuration of the WSS site itself and the browser that is being used to access that site. It also differs based on what browser the user is using i.e. Internet Explorer vs. everything else.

By default WSS sites are configured to accept Windows Integrated Authentication (WIA). That means that a user who accesses a WSS site through Internet Explorer can be authenticated as the user logged into the Windows client. However, this can be affected by the User Authentication setting in Internet Explorer for each user.

- If the setting is Anonymous Logon, the user will not be able to access the WSS site.
- If the setting is Automatic logon only in Intranet zone or Automatic logon with current username and password, the user will be logged is using the credentials used to log in last time to the WSS site when Remember my password was also set. If the user has never been challenged for a username and password, it will be the Windows login user.
- If the option is set to Prompt for user name and password, WSS will challenge the user to provide a user name and password and authenticate the user with those credentials regardless of the credentials the user used to log into Windows.

It is the last option that can cause issues. These credentials will be used from the entire session on WSS. If the user also happens to select Remember my password, those credentials will be used even if the user switches the option back to one of the automatic logon settings. For example, if user A logs into windows as user A, then logs into WSS site X as user B and also selects remember my password, and then changes the authentication back to automatic, user A

will always log into WSS site X as user B. In order to get out of it, user A will have to set authentication back to prompt for username and password, log in as user A AND select remember my password, then change the authentication method back to automatic logon. The login information is stored per WSS site.

The other issue that could occur is that the user accessing the WSS item may not be the same user that is logged into the portal. For example, if user A logs into the portal from user B's computer, and the clicks through to a WSS item, user A will be authenticated by WSS as user B. If user B does not have access to the item in WSS, user A may receive a message saying that the item in not accessible. This is because the portal does not pass its authentication to WSS and authentication to the WSS site is handled by WSS itself through the methods described above.

Customizing the UI of the SharePoint Console Portlets

The UI of the SharePoint Console portlets can be controlled by custom stylesheet that is loaded with the banner in the SharePoint Console. 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>\imageserver\SharePoint\private\css

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

APPENDIX E

Snapshot Queries and WSS Integration

The SharePoint Search Portlets are essentially running preformatted advanced searches. Snapshot queries also allow portal managers to create preformatted advanced searches as well. Since snapshot queries do not require end user input e.g. they don't require an end user to enter a search term, they can be useful to present information such as a list of all the latest WSS items created. In the AquaLogic Interaction G6, snapshot queries also control which properties i.e. columns are returned.

To create snapshot queries that mimic the SharePoint Search Portlet in the AquaLogic Interaction G6, enter the condition "WSS Site contains *" in the snapshot query search criteria. Also make sure that the query portlet displays search fields so that end users can enter their search terms if you wish to allow users to enter a search term.

However, the behavior of snapshot queries will not behave exactly like that of the SharePoint Search Portlets in the following ways:

- The click through behavior to WSS documents will only follow the setting of the content source.
- If you include the WSS Properties URL as a displayed property, the entire URL will be displayed and not just the properties icon. This URL can be very long.
- Results clicked on from snapshot queries will not be listed in the SharePoint Console Most Recently Used Portlet.

For 5.0, you can only enter conditions to return items from specific WSS sites. For example, the condition "WSS Site contains WSS" will return items from all WSS sites that contain the string WSS in the name. This is because in 5.0 the wildcard '*' also includes 'blank' or 'no value'. So

the condition “WSS Site contains *” will return more than just WSS items. Also, many of the advanced functions of the G6 snapshot queries are not available in the Plumtree Corporate Portal 5.0. While a 5.0 snapshot query can be made to return results, end users will not be able to enter their own search terms and the properties that are displayed are not configurable.