

Stellent<sup>®</sup> Content Portlet Suite

# CPS for WebSphere Portal Server



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## CHAPTER 1

# Introduction

The information contained in this guide is subject to change as the product technology evolves and as hardware and operating systems are created and modified.

Due to the technical nature of browsers, databases, web servers, and operating systems, Stellent, Inc. cannot warrant compatibility with all versions and features of third-party products.

In this section:

- About this guide
- Product overview
- Conventions used in this guide
- CIS Administration Application Help system

## About this guide

This guide documents the steps required to deploy and configure the Stellent Content Portlet Suite for WebSphere Portal Server. The guide assumes the reader is familiar with the WebSphere Administrative Console and administrative functions.

**Note:** While the Content Portlet Suite for WebSphere Portal Server may be deployed on any WebSphere-supported operating system, this deployment guide assumes a Windows environment.

This guide is intended for application developers and integrators who wish to access Stellent Content Server functions via the Stellent Content Portlet Suite deployed on IBM WebSphere Portal Server.

## Product overview

As organizations search for ways to improve their efficiency, access to corporate knowledge has become crucial. A key area is implementing a corporate portal to provide a secure, personalized way to aggregate data for consumption and processing. To provide the best possible combination of a portal solution and a content management solution, Stellent has created the Stellent Content Portlet Suite for Plumtree Portal Server.

The Content Portlet Suite provides access to Stellent Content Server, enabling users to update, search, and view portal content in a way that is efficient and easy to use. Stellent provides the ability to manage content creation and the distribution process through a set of easy-to-use portlets. These portlets can be enabled for different users based on their roles and permissions within the organization, and they can be easily customized for specific uses. Users can browse or search content based on their permissions, contribute new content (with the appropriate level of access), and view the progress of their content through workflow.

## **Content Portlet Suite: keeping portals up to date**

Because of the ease of use of the Content Portlet Suite, a key issue is addressed with corporate portals—how to keep their content up to date. By driving content updates and additions through the portal interface, the process of updating the portal becomes part of using the portal, as opposed to a separate task performed outside of the portal.

### **Ease of use: contribution**

With Stellent, content contribution is simple. Users can contribute content by checking in a document. Stellent takes care of normalizing the data with its ability to convert files through templates to your specified markup for viewing in the portal.

### **Ease of use: workflow**

After checking in or updating content, users can track the content status through the portal. Users are notified right in the portal of their workflow status—to review, edit, and approve content—with links right to the content from the workflow item. They can click on the item, view it, and approve or edit it, and then send it on its way for further workflow or publishing. When content is approved, it is published and made available for viewing. Approved content can be published at a predetermined time as well, and expired at a predetermined time (e.g., in the case of a promotional offer or classified ad).

### **Ease of use: browsing**

Content can be presented to users based on their role in the organization. The support team may log in to see a portlet that shows new updates and fixes, with another portlet that shows current cases. These are automatically updated through the Stellent Content Management System and require no manual intervention. They appear to the users as titles with a link to the content; they may also have a short summary of the content.

### **Ease of use: searching**

Content can be easily searched based on metadata categories or full text content, or both, through a provided Stellent portlet. For instance, users may search for a “support note” content type containing the word “policy,” which removes the need to search through all other occurrences of the word “policy” in other content types. Stellent provides separate portlets for basic or authenticated search. Stellent even provides a portlet that allows users to save searches that they use regularly.

### **Easy to administer**

Stellent Content Server and the Content Portlet Suite are easy to administer. They can be set up and left to run indefinitely. Once you have decided your metadata model and workflow paths, Stellent can be installed and linked to the portal, and users can begin contributing and viewing content.

### **Metadata Admin portlet**

The Content Portlet Suite comes with a Metadata Admin portlet that allows you to modify properties of the content server metadata fields, which affects the behavior of the Contribution Portlet. With the Metadata Admin portlet, an administrator can define which metadata fields users see, as well as the default metadata value for each field. Administrators can even hide metadata fields and specify what values should be set for those items.

## High performance

The Stellent Content Portlet Suite is built on top of the Stellent Content Integration Suite. This powerful integration layer offers speedy asynchronous access to content.

## Easy to customize

The portlets in the Stellent Content Portlet Suite are written to be easily customized. If you want to create a new portlet to show content of a certain metadata value, copy the existing Browse portlet, tweak one simple parameter, and publish the portlet. Written in JSP, they are standards-based and easily customizable, even by business users. Customizing the portlets will help you make the most of your portal investment

By integrating Stellent Content Server and a portal server with the Content Portlet Suite, you provide an easier way to keep your portal up to date, increase efficiency, lower costs, and increase your return on your portal investment.

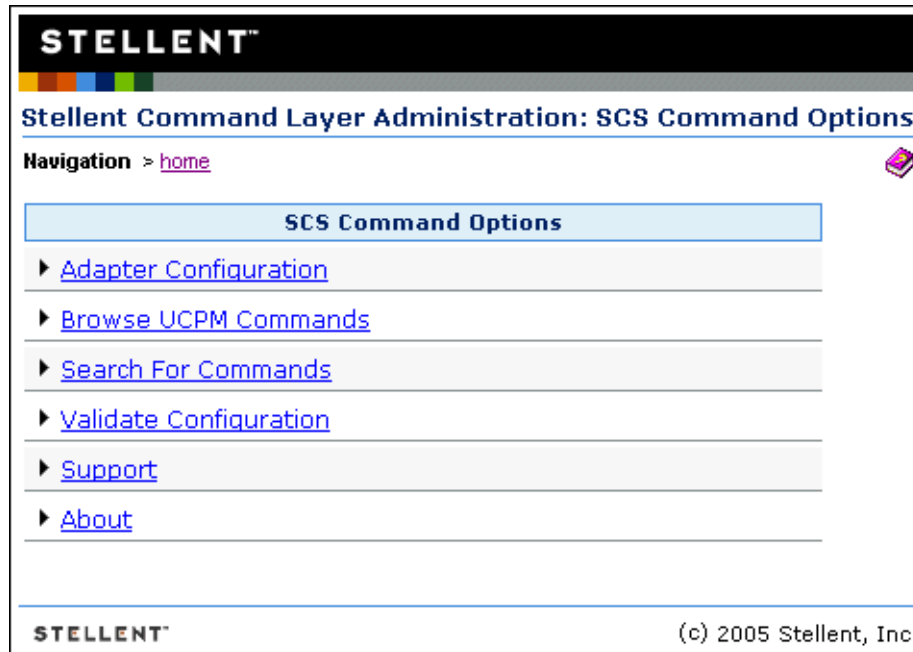
# Conventions used in this guide


This guide contains the following conventions:


Convention	Definition
<b>Bold</b>	Indicates an item that you select in the interface, such as a button or menu, in order to perform a specific task. For example, "Click <b>OK</b> ."
>	Indicates a menu choice. For example, "Choose <b>File &gt; Open</b> " means "Click the <b>File</b> menu, and then click <b>Open</b> ."
Code	Indicates the actual code used.

## CIS Administration Application Help system

If you need assistance with the CIS Administration Application, the installation guide is available in both online Help and PDF. The Help system consists of individual Help topics in HTML format. You can view the Help system in a web browser such as Internet Explorer or Netscape Navigator, and you can use conventional web browser controls to navigate and view the Help topics (Back, Forward, Refresh, and so on).



Click the **Help**  icon to view the online help. Each dialog box has a Help button that takes you directly to a topic that provides descriptive information on the functionality of that dialog box.

On the Help topic, click the **Show Navigation**  button in the navigation bar to view the complete CIS Installation Guide online (includes the contents of the Help system in the appendix).








The online Help contains the following navigation options:

- **Contents:** The Contents tab contains an expandable list of Help topics. Click a book icon to expand or collapse that section of the Help system and then select the desired Help topic to view a topic.
- **Index:** The Index tab provides immediate access to individual Help topics by keyword.
- **Search:** The Search tab provides a full-text search of the Help system. Type the word or phrase you are looking for and then click **Go** (or press Enter on your keyboard).
- **Favorites:** The Favorites tab provides a means to save topics that you have found useful and anticipate viewing again. (When viewing such a topic, click **Favorites** and then click **Add** to add the topic to your Favorites list.)

**Note:** The Favorites tab does not display if your browser doesn't support the Java applet used by the Help system (see).



The online Help also includes a toolbar with the following options:

Toolbar	Definition
	Highlights the title of the topic currently being viewed in the Contents tab. <b>Note:</b> If you open a Help topic by clicking the Help button in a dialog box, the Show Navigation button will be displayed instead.
	Displays the topic that precedes the currently displayed topic. (The order of topics can be seen on the Contents tab.)
	Displays the topic that follows the currently displayed topic. (The order of topics can be seen on the Contents tab.)
	Opens a new, blank email message with the name of the Help topic in the Subject line, addressed to Stellent Technical Support. Please use this feature to provide feedback to Stellent on the topic itself or how the topic is documented.
	Prints the currently displayed topic by using your web browser print feature.
	Opens a PDF version of the CIS Installation Guide (includes the contents of the Help system in the appendix). You can read the PDF version online or print it out, if you prefer.
	Connects to the Stellent web site ( <a href="http://www.stellent.com">www.stellent.com</a> ), where you can learn more about Stellent products, upcoming events, and technical support.

### Notes

- The Help systems use a secure Java applet to display the Contents, Index, Search, and Favorites tabs. If the Java applet is not installed or enabled in the web browser used to view Help, a JavaScript rendition of Help will display, instead. If both Java and JavaScript are disabled in the web browser, the browser will not be able to display Help.
- The Java applet is not supported by Internet Explorer on UNIX, Netscape 4.x on Macintosh, Netscape 6.x on any platform, or by any machine running a newer version of the Java Runtime Environment (JRE) 1.3.1\_02. For these browsers and operating systems, the JavaScript rendition of Help will display (assuming it is not disabled in the browser).

## CHAPTER 2

## Conceptual information

This section describes the Stellent Content Portlet Suite for WebSphere Portal Server and covers the following topics:

- Portlet descriptions
- Internationalization (cross-locale implementations)
- Integration architecture
- Portlet request-handling

**Important:** CIS version 7.6 must be installed. The Universal Content and Process Management API (UCPM API) replaces the architecture used in CIS 7.2 and is not compatible. See “Migrating from version 7.2” in the UCPM API Developer’s Guide for more information ([ucpm-developers-guide.pdf](#)).

**See also:**

- See the CIS Installation Guide for information on the CIS framework ([cis-install-guide.pdf](#)).
- See the UCPM API Developer’s Guide for information on command invocation, execution, and extending commands ([ucpm-developers-guide.pdf](#)).
- See the Portlet Developer’s Guide for information on the portlet framework and the portlet software development kit ([cps-developers-guide.pdf](#)).

## Portlet descriptions

The Content Portlet Suite implements the following set of portlets that interact with Stellent Content Server and/or Stellent Image Server:

### Content server

- **Library portlet:** Content can be presented to users based on their role in the organization.
- **Search portlet:** Allows the user to perform a keyword or full-text search on the content server and permits read-only access to the returned content
- **Saved Search portlet:** Allows the user to save frequently used queries.
- **Contribution portlet:** Allows the user to contribute content to the content server.
- **Workflow Queue portlet:** The workflow portlet notifies users of their workflow tasks.
- **Authenticated Library portlet:** Presents content to users based on their role in the organization, and provides read/write access to the returned content.
- **Authenticated Search portlet:** Allows the user to perform a selected metadata and keyword search on the content server and provides read/write access to the returned content.
- **Metadata Admin portlet:** Allows the user to modify the properties of custom metadata.

### Image server

- **Image Server Search Portlet:** This search portlet queries the image server. Allows the user to perform a search on the image server and permits read-only access to the returned content.

### Content server & image server

- **Federated Search Portlet:** This search portlet queries both the content server and the image server repositories. This portlet provides an integration between an image server and a content server or multiple content servers, etc.

Each of these portlets requires that the Stellent Content Integration Suite (CIS) is installed and available. The Content Integration Suite provides a Java API into the content server and/or image server and is capable of running inside a J2EE application server environment (e.g., WebSphere or WebLogic) or a servlet container environment (e.g., Tomcat).

The portlets are consumers of standard content server services (IdcCommand services), such as CHECKIN\_UNIVERSAL and GET\_SEARCH\_RESULTS. However, these services are not called directly by the dispatch handlers from the portlet controller. Rather, the Universal Content and Process Management API [UCPM API] abstracts the portlets from the details of talking to the server. The UCPM API allows for rigid parameter validation, dynamic command selection, and standardized integration with a J2EE environment.

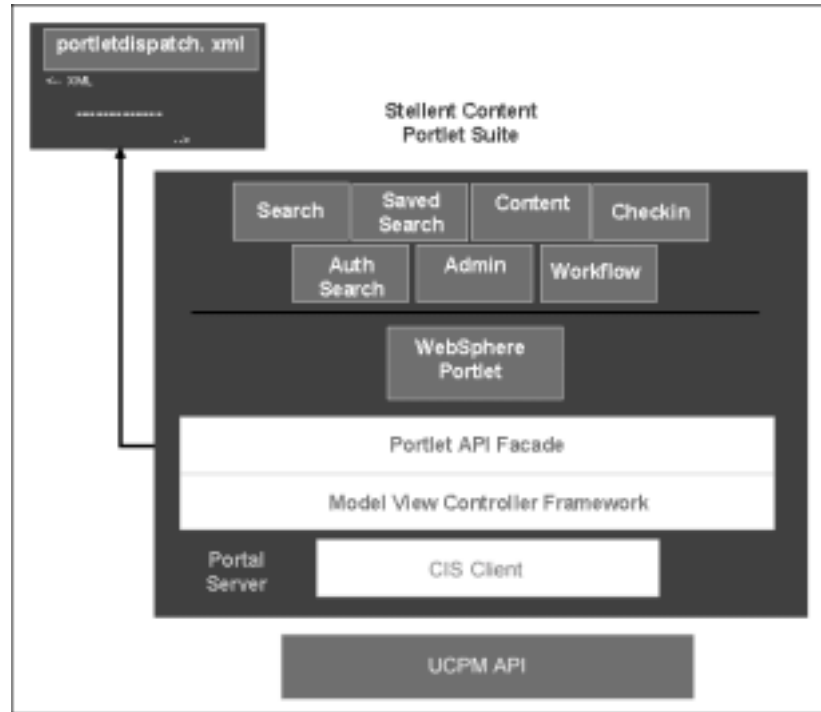
**Note:** See the UCPM API Developer's guide for more information ([ucpm-developers-guide.pdf](#)).

## Internationalization (cross-locale implementations)

The portlets will only support the locale of the Java Virtual Machine that is running the Portal Server. There is currently no support for managing cross-locale implementations on the same Portal Server.

## Integration architecture

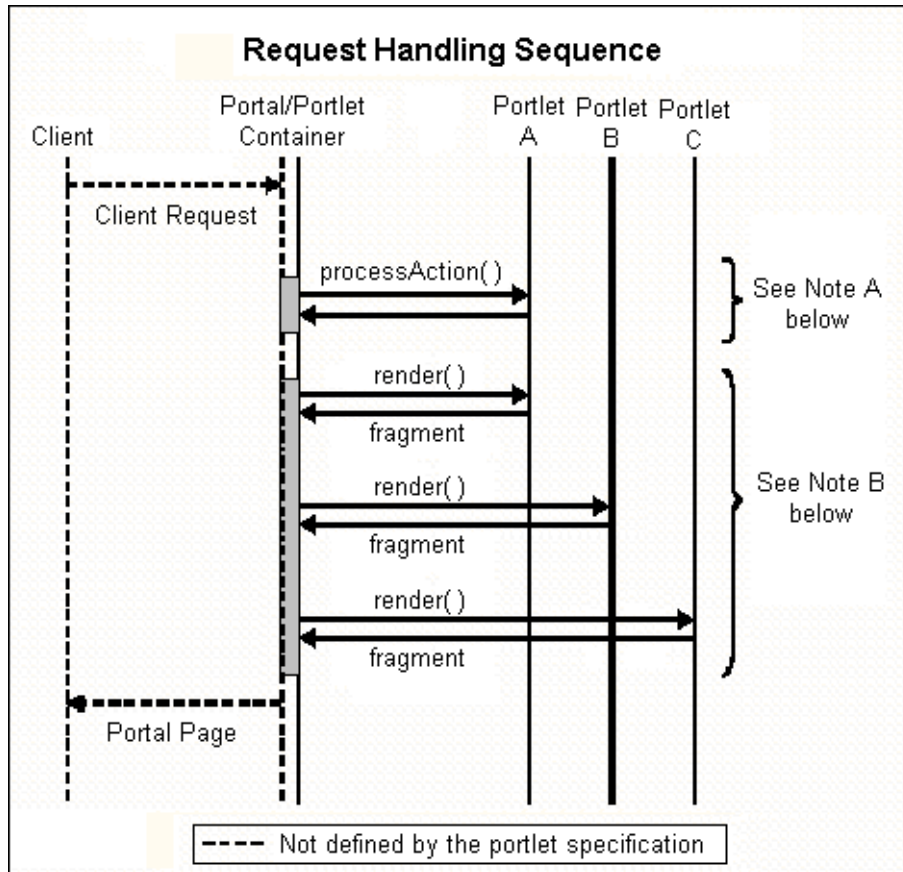
The Stellent Portlets are developed using the JSR 168 standard (within the WebSphere framework) and uses the UCPM API within the CIS distribution to communicate back to the content server and/or image server. The Portlet API facade abstracts the common operations within portlet containers so our framework will work on a variety of platforms (WebSphere, WebLogic, Plumtree, and SunONE) using the same handler code. Portlet Actions are mapped to a custom MVC framework that uses the UCPM API to perform the desired task.



## Portlet request-handling

This is the high-level sequence of events for portlet request-handling (based on the Search portlet):

1. A user enters a query and clicks the Search button.
2. An 'action' URL is built and routed to the portlet container, which, in turn, routes the command to the appropriate portlet (in this case, the search portlet).
3. A processAction' is called on the Search portlet.
4. The Search portlet retrieves the search parameters (they are part of the URL that was built), and calls the 'search' method on the Stellent Content Integration Suite API.
5. The Stellent Content Integration Suite queries Stellent Content Server via the Resource Pool (a pool of socket connections), retrieves the data, and passes the data object (LWDataBinder) to the Search portlet.
6. The portlet container calls *render* on each of the portlets on the page (including the Search portlet), and each portlet uses the received data, or refreshes the data, and displays HTML fragments to the user.



**Note A:** The *action* request must finish before the *render* requests begin.

**Note B:** The *render* requests are not triggered in any specific order. They may be executed sequentially or simultaneously.

### Portlet API facade

Not every portal vendor supports the standard completely or in exactly the same way, so each action handler has access to a facade object that provides an interface that protects the user of the facade from code incompatibilities between various portal vendors.

**Note:** See the Stellent Portlets Developer's Guide for a presentation of the portlet dispatch framework and information on using the Stellent Portlet SDK ([cps-developers-guide.pdf](#)).

## CHAPTER 3

# Installing the Stellent Content Portlet Suite

This chapter provides information required for the installation of the Stellent Content Portlet Suite for WebSphere Portal Server and covers the following topics:

- Installation prerequisites
- Installation steps
- Defining the Federated Search portlet mapping
- Recommended access settings

**Note:** Content Integration Suite 7.6.1 must be installed. The Universal Content and Process Management API (UCPM API) replaces the architecture used in CIS 7.2 and is not compatible. See “Migrating from version 7.2” in the UCPM API Developer’s Guide for more information ([ucpm-developers-guide.pdf](#)).

**See also:**

- See the CIS Installation Guide for information on the CIS framework ([cis-install-guide.pdf](#)).
- See the UCPM API Developer’s Guide for information on command invocation, execution, and extending commands ([ucpm-developers-guide.pdf](#)).
- See the Portlet Developer’s Guide for information on the portlet framework and the portlet software development kit ([cps-developers-guide.pdf](#)).

## Installation prerequisites

**Convention:** This guide uses the forward slash ( / ) to separate directories. Depending on your operating system, you may need to change the separation markers when defining directories.

**Note:** While the Content Portlet Suite may be deployed on any WebSphere-supported operating system, this guide assumes a Windows NT Server environment.

### Required servers and components

These servers and components are required for the installation of CPS for WebSphere:

- WebSphere Portal Server 5.0.2.
- Stellent Content Server 6.2 or later or Stellent Image Server 7.5 or later (or both).
- Stellent Content Portlet Suite distribution file ([stellent-cps-7.6.1.zip](#)).

## Preliminary Setup

The following must be completed before installing the Stellent Content Portlet Suite for WebSphere:

- Configure Stellent Content Server for Verity search.
- Install WebSphere Portal Server or choose an existing installation for Stellent Portlet deployment. This guide refers to the WebSphere Portal Server installation directory as WPS\_HOME.

For example:

C:/Program Files/WebSphere/PortalServer/

**Important:** UserIDs on the content server must correspond with UserIDs on the portal server.

- Install or enable Embedded Messaging / JMS Server for servlet deployment.

Follow these steps if you do not have Embedded Messaging / JMS Server installed on your WebSphere Application Server instance:

1. Stop WebSphere Application Server.
2. Install the WebSphere MQ embedded messaging component.

**Tech Tip:** The WebSphere MQ Install.exe executable is located in the /was/win/ directory (for Windows) of the WebSphere Portal Server CD: DISC 1-1.

3. Select **Add options to my existing Application Server Installation**.
4. Select **Custom**.
5. Select the **Embedded Messaging** option and enable both **Client** and **Server**.

## Installation steps

You must have completed the preliminary setup described above before installing and configuring the Content Portlet Suite.

**Important:** Stellent Content Server must be configured for Verity search.

This section covers the following topics:

- Install CPS for WebSphere
- Display the Stellent portlets

## Install CPS for WebSphere

1. Unpackage the CPS distribution file (stellent-cps-7.6.1.zip) and save to a location on your local server.

For example:

C:/stellent-cps-7.6.1/

2. Start WebSphere Application Server and WebSphere Portal Server.
3. With a web browser, navigate to the default portal page.

For example:

http://testserver.stellent.com:9081/wps/portal.

4. Log in as a valid WebSphere Portal Server administrator.

For example:

User ID: **wpsadmin**

Password: **wpsadmin**

5. Click **Administration** and wait for the new page to load.
6. On the Portal Administration page, click **Portlets** and wait for the new page to load.
7. Click **Install** and wait for the new page to load.
8. Click **Browse** and navigate to the websphere directory of the unpackaged CPS distribution file.

For example:

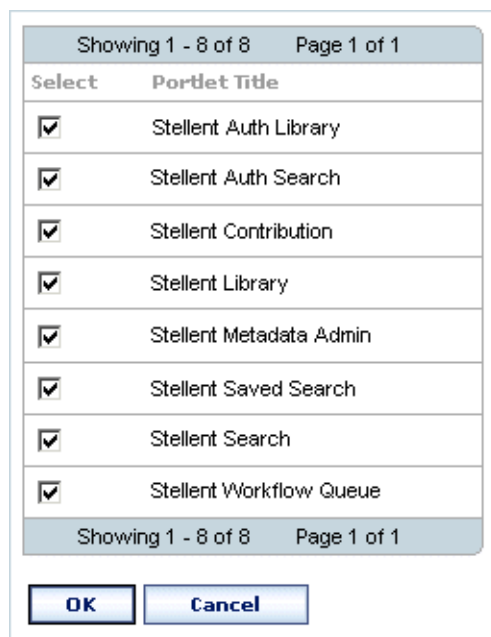
`C:/stellent-cps-7.6.1/portlets/weblogic/`

9. Select the StellentPortlets.war file.
10. Click **Open**.
11. Click **Next**.
12. Click **Install**. It may take several minutes for WebSphere Portal Server to load the WAR file. When complete, a confirmation message is displayed.

## Display the Stellent portlets

1. On the Portal Administration page, click **Portal User Interface**.  
**Note:** To access the Portal Administration page, navigate from the default portal page by clicking Administration and then Portlets.
2. Click **Manage Pages**.
3. Select **My Portal** and then **Welcome** (or another portal page you wish to modify).
4. Click the **Edit Page Layout** icon.
5. On the Edit Layout page, click **Add Portlets**.
6. Search for the Stellent portlets: from the "Search on" drop-down list, select **Title Contains**.
7. In the "Search for" field, enter **Stellent**.
8. Click **Search**.  
The Stellent portlets are listed.
9. Select all of the Stellent portlets (see Figure 3-1).





**Figure 3-1** *Stellent portlet list.*

**Note:** Also select the Image Server Search portlet and the Federated Search portlet if you are connecting to a Stellent Image Server instance.

10. Click **OK**.
11. Arrange the portlets as desired on the page and then click **Done**.

## Defining the Federated Search portlet mapping

The Federated Server Search portlet queries both the Stellent Image Server and the Stellent Content Server databases (or multiple content servers, etc.). This portlet provides an integration between an image server and a content server or multiple content servers.

**Note:** Each content server and/or image server instance must be configured (for example, the IP address of the application server must be enabled on the image server). See the CIS Installation Guide for more information.

This portlet enables your portal users to search both the content server and the image server for business content. Users can search by subject and/or keyword. The results of the search are delivered to the user in a list format.

The common metadata map defines the Federated Search portlet mapping. This XML file is located in the `StellentPortlets/WEB-INF/config/` directory as is called `ucpmcommon-metamap.xml`.

This example illustrates a common metadata map:

```
<!--
  Default metadata map for the different adapter types. These values will be used
  if a metadata map is not specified. The name attribute corresponds to the adapter
  type (i.e. " scsadapter " is a Stellent Content Server Adapter and " sisadapter " is
  a Stellent Image Server adapter)
-->
<metamap>
```

```

<adapter name="scsadapter">
  <common>
    <map name="Title" native="dDocTitle" />
    <map name="Author" native="dDocAuthor" />
    <map name="Date" native="dInDate" />
    <map name="ID" native="dID" />
  </common>
  <contribution>
    <!-- native fields are used only for contribution -->
    <native name="comments" default="" override="true" />
    <!-- common fields refer back to common map, can also be tagged
         with default and override attributes -->
    <common name="title" />
    <common name="author" />
  </contribution>
</adapter>
<adapter name="sisadapter">
  <common>
    <map name="Title" native="DocType" objectClass="SImageHRAppIndex" />
    <map name="Author" native="EmployeeName" objectClass="SImageHRAppIndex" />
    <map name="Date" native="DocDate" objectClass="SImageHRAppIndex" />
    <map name="ID" native="SSN" objectClass="SImageHRAppIndex" />
  </common>
</adapter>
</metamap>

```

This metadata map defines both a content server ('scsadapter') and an image server ('sisadapter'). The <metamap> node can contain any number of <adapter> nodes.

The <adapter> node takes a name attribute, this name should correspond to the adapter configured in the adapter config xml for the repository you want to define. Each <adapter> node can tag in two sub nodes, <common> and <contribution>. The <common> node indicates that you are going to create some metadata field mappings. To create one, you need only to create a sub node <map> and provide a common name attribute 'name' and a 'native' attribute.

The common name should be one that you will define on each adapter you configure which you expect to make common calls on. The native name is the name of the metadata field as seen by the specific repository. For example, in the above example, we have mapped the common name "title" to dDocTitle on a content server instance.

The default entries are "scsadapter" and "sisadapter". To change the default entries simply edit the XML file. For example, this defines "contentserver7":

```
<adapter name="contentserver7">
```

There is one more piece of information to make a similar mapping on an image server. An image server repository allows different metadata models to be present in the same repository and separates them by Application type. The 'objectClass' attribute to the <map> node corresponds to this Application type. For example, the same common name "title" is mapped to the native DocType of the application 'SImageHRAppIndex' in the image server repository defined by the adapter name 'sisadapter'.

To add or edit the adapter entry for the image server simply edit the <adapter> node and the objectClass attribute of the <map> node.

For example, this defines "imageserver7" and the "SImageDevIndex" objectClass:

```
<adapter name="imageserver7">
```

```

<common>
  <map name="Title" native="DocType" objectClass="SImageDevIndex" />
  <map name="Author" native="EmployeeName" objectClass="SImageDevIndex" />
  <map name="Date" native="DocDate" objectClass="SImageDevIndex" />
  <map name="ID" native="SSN" objectClass="SImageDevIndex" />
</common>
</adapter>

```

**Note:** See the “Common metadata maps” in the UCPM API Developer’s Guide for more information ([ucpm-developers-guide.pdf](#)).

## Recommended access settings

By default, portlet security is set to allow access by only the system administrator. You must configure security to allow other users to access the portlets, too.

You should assign permissions based on the access requirements you establish for users. However, some security settings are recommend for authenticated users and for anonymous users:

Groups	Recommended Access
Authenticated Users	<p>These security settings are recommend for authenticated users:</p> <ul style="list-style-type: none"> <li>■ Stellent Library: <b>edit</b></li> <li>■ Stellent Search: <b>edit</b></li> <li>■ Stellent Saved Search: <b>edit</b></li> <li>■ Stellent Contribution: <b>edit</b></li> <li>■ Stellent Workflow Queue: <b>view</b></li> <li>■ Stellent Authenticated Library: <b>edit</b></li> <li>■ Stellent Authenticated Search: <b>edit</b></li> <li>■ Stellent Metadata Admin: <b>view</b></li> <li>■ Image Server Search Portlet: <b>edit</b></li> <li>■ Federated Search Portlet: <b>edit</b></li> </ul> <p><b>Note:</b> The Stellent Metadata Admin portlet is an administration portlet and should be restricted to admin- level users.</p>
Anonymous Users	<p>These security settings are recommend for anonymous users:</p> <ul style="list-style-type: none"> <li>■ Stellent Library Portlet: <b>view</b></li> <li>■ Stellent Search Portlet: <b>view</b></li> <li>■ Image Server Search Portlet: <b>view</b></li> <li>■ Federated Search Portlet: <b>view</b></li> </ul>

## CHAPTER 4

# *Stellent Portlet functionality*

This chapter provides information on the Stellent portlets, including a tutorial and instructions on how to customize the Library and Authenticated Library portlets.

In this section:

- Using the Stellent portlets
- Customizing the Library and Authenticated Library portlets

**Important:** It is assumed that all of the installation steps have been performed and that all of the Stellent portlets are accessible to the home page.

## Using the Stellent portlets

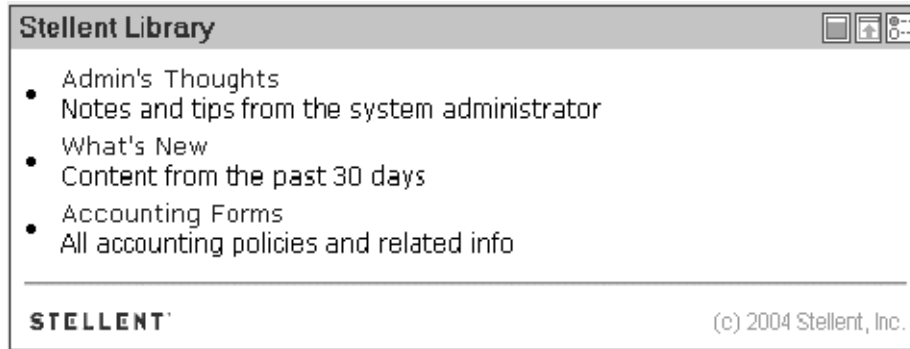
This section provides a brief tutorial of each of the Stellent Portlets:

- Stellent Library portlet
- Stellent Search portlet
- Stellent Saved Search portlet
- Stellent Contribution portlet
- Stellent Workflow Queue portlet
- Stellent Authenticated Library portlet
- Stellent Authenticated Search portlet
- Stellent Metadata Admin portlet
- Stellent Image Server Search portlet
- Stellent Federated Search portlet

**Note:** The portlet images in this section are examples only. The actual look (icons, colors, etc.) may be different on your portal server instance.

## Stellent Library portlet

The Stellent Library portlet enables your portal users to view content that matches criteria pre-defined by the portlet administrator. The results of the pre-defined search are delivered to the user in a list format. By selecting a hyperlink item in the list, the user can view the content. The user can also view the content item information page. The content displayed to the user is defined by the administrator.



The Stellent Library portlet displays the queries pre-defined by the portal administrator.

### Using the Stellent Library portlet

1. On the Stellent Library portlet, click the **Edit** icon.

The user personalization functionality allows user to modify the displayed results from a search:

- **Results per Page:** Enter the number of results to display per page.
- **Sort Field:** Select the field to sort on (title, author, status, etc.)
- **Sort Order:** Options are *Ascending* or *Descending*.



2. Modify the settings as desired.
3. Click **Save** when edits are complete.
4. Select a search query (for example, "What's New").

5. Click **Back**.

## Stellent Search portlet

The Stellent Search portlet enables your portal users to search the content server for business content. Users can search by subject and/or keyword. The results of the search are delivered to the user in a list format. By selecting a hyperlink item in the list, the user can view the content. This portlet also enables users to save queries for display in the Stellent Saved Search portlet.

The screenshot shows a web browser window titled "Stellent Search". Inside the window, there are two text input fields: "Subject" and "Keywords". Below these fields is the "STELLENT" logo in a bold, sans-serif font. To the right of the logo is a "Submit" button. In the top right corner of the window, there are three small icons: a square, a square with an upward-pointing arrow, and a square with a double arrow.

### Using the Stellent Search Portlet

1. On the Stellent Search portlet, click the **Edit** icon.

The user personalization functionality allows user to modify the displayed results from a search:

  - **Results per Page:** Enter the number of results to display per page.
  - **Sort Field:** Select the field to sort on (title, author, status, etc.)
  - **Sort Order:** Options are *Ascending* or *Descending*.
2. Modify the settings as desired.
3. Click **Save** when edits are complete.
4. Enter a subject or keyword and click **Search** (e.g., "test").

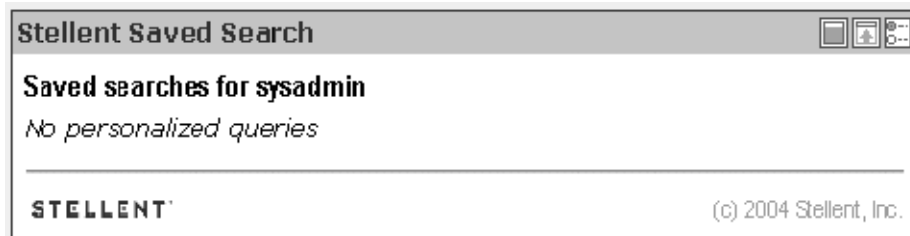
**Note:** There must be content checked into your content server that contains the specified subject or keyword for items to be retrieved.
5. On the search results screen, click **Save**.

The save search query screen is displayed. This functionality saves a search to the saved searches list of the Stellent Saved Search portlet.

The keyword used to perform the search is displayed in the *Keywords* field. To save a search, enter a title for the query, the content item title and click **Add New Query**.
6. Click **Back** to return to the search results page.

## Stellent Saved Search portlet

The Stellent Saved Search portlet enables your portal users to view previously saved searches. Saved searches are delivered to the user in a list format. By selecting a hyperlink item in the list, the user can view the content of the saved search. Saved searches can be saved to the list by performing a search using the Stellent Search portlet and saving that search or by directly defining search parameters on the Stellent Saved Search portlet.



### Using the Stellent Saved Search portlet

**Note:** Saved searches can be saved to the saved searches list by performing a search using the Stellent Search portlet and saving that search, or by directly defining search parameters on the Stellent Saved Search portlet.

1. On Stellent Saved Search portlet, click **Edit**.

The search criteria page is displayed. On this page you can edit your standard search parameters, view or delete items from your saved search list, and create a new query.

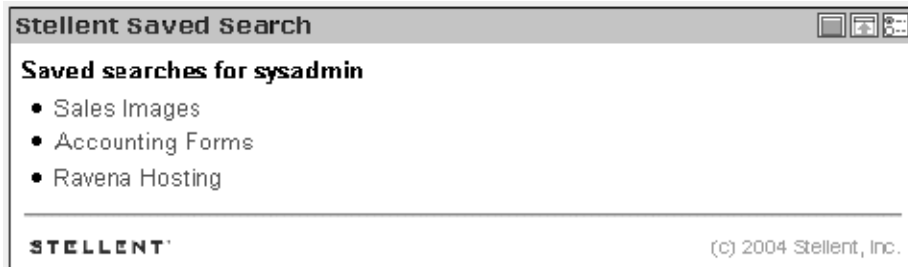
**Important:** Rather than entering a query string, you can perform a standard search using the Stellent Search portlet, click **Save**, and then click **Add New Query**.

2. Enter the information for the new query:
  - Query Title (e.g., "Sales Images")
  - Query Description (e.g., "Sales Department Images")
  - Query Text (e.g., dDocTitle <substring> `salesimage`)

**Important:** Rather than entering a query string, you can perform a standard search using the Stellent Search portlet, click **Save**, and then click **Add New Query**.

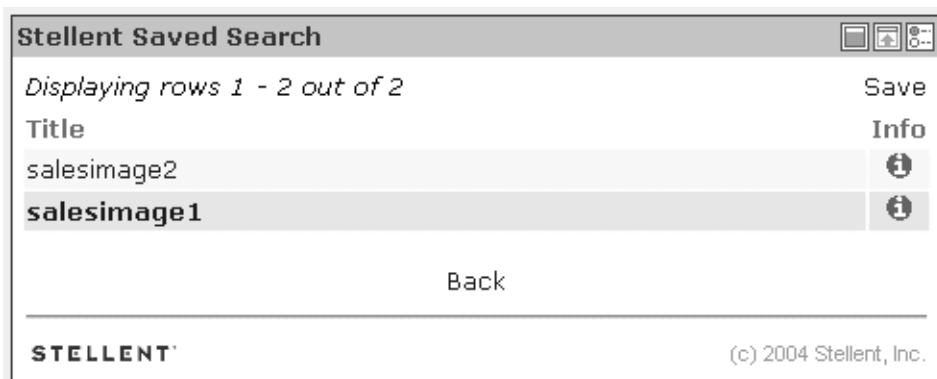
3. Click **Add New Query**.

This example includes the Query Titles "Sales Images," "Accounting Forms," and "Ravena Hosting."



4. Click a saved search title.

The saved search results are displayed.



5. Click **Back**.



## Stellent Contribution portlet

The Stellent Contribution portlet enables your portal users to submit native business content for management and publishing purposes. The content submission can trigger automatic indexing, workflow routing, subscription services, and security. When the required add-on modules are used with the content server, content categorization and publishing in multiple formats (HTML, XML, WML, cHTML, and PDF) can be performed.

The screenshot shows a web browser window titled "Stellent Contribution". Inside the window is a form titled "Content Check In Form". Below the title is a dashed line and a paragraph of text: "The Content Check In Form page is used by contributors to check files into Stellent Content Server. Please note that some fields are optional." The form contains the following fields and controls:

- Content ID**: A text input field.
- Type**: A dropdown menu with "ADACCT - Acme Account" selected.
- Title**: A text input field.
- Author**: A text input field.
- Security Group**: A dropdown menu with "Public" selected.
- Primary File**: A text input field followed by a "Browse..." button.
- Comments**: A large text area with a vertical scrollbar.

At the bottom of the form are two buttons: "Check In" and "Clear". The footer of the window contains the "STELLENT" logo on the left and "(c) 2004 Stellent, Inc" on the right.

### Using the Stellent Contribution portlet

1. On the Stellent Contribution portlet, enter any required metadata and any desired optional metadata.

The Stellent Contribution portlet enables users to submit business content created in native applications for publishing and revision control.

**Note:** Metadata fields are defined by the content server administrator.

2. In the File field, enter the complete path or click **Browse** to select the business content for check in.
3. Click **Check In** to submit the business content.

## Stellent Workflow Queue portlet

The Stellent Workflow Queue portlet enables your portal users to quickly access content that is waiting for their review. This portlet provides users direct access to their workflow in-boxes for the review and approval of business content. A workflow must be defined for this portlet to provide functionality. The portlet lists the content item title, workflow step information, the last action performed, and the actions allowed, and provides a link to content item information.



### Using the Stellent Workflow Queue portlet

A workflow must be defined for this portlet to provide functionality. See the content server online Help for instructions on defining a workflow. This example assumes a criteria workflow with these properties:

- Name: WorkflowTest
- Security Group: Public
- Has Criteria Definition: ENABLED
- Field: Type
- Operator: Matches
- Value: ADSALES

And it assumes a workflow step with these properties:

- Name: StepOne
- Type: Reviewer
- User: User1

To use the Stellent Workflow Queue portlet:

1. Locate the Stellent Workflow Queue portlet.
2. After creating a workflow, log in as a workflow reviewer (e.g. user1) and check in a content item matching the specified criteria.
3. Review the workflow item.

The Stellent Workflow Queue portlet provides this functionality:

- **Title:** Lists the content item. Click to download file.
- **Workflow Info:** Lists the active step. Click to view workflow step information.
- **Last Action:** Lists the last action the user performed on the workflow.
- **Action:** Users defined as Reviewers can *Approve* or *Reject* content. Users defined as Reviewer/Contributor can *Approve*, *Reject*, or *Contribute* content.
- **Info:** Provides content item information.

Stellent Workflow Queue				
Title	Workflow Info	Last Action	Actions	Info
WorkflowTest	StepOne		Approve / Reject	

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4. Click the *Workflow Queue* step name to view the workflow step information
5. Click **Back**.
6. Click **Approve** or **Reject**.

## Stellent Authenticated Library portlet

The Stellent Authenticated Library portlet enables your portal users to perform a selected metadata and keyword search on the content server, and provides read/write access to the returned content.

Stellent Authenticated Library
<ul style="list-style-type: none"> <li>• Admin's Thoughts Notes and tips from the system administrator</li> <li>▪ What's New Content from the past 30 days</li> <li>▪ Accounting Forms All accounting policies and related info</li> </ul>

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### Using the Stellent Authenticated Library portlet

1. On the Stellent Authenticated Library portlet, click the **Edit** icon.  
The user personalization functionality allows user to modify the displayed results from a search:
  - **Results per Page:** Enter the number of results to display per page.
  - **Sort Field:** Select the field to sort on (title, author, status, etc.)
  - **Sort Order:** Options are *Ascending* or *Descending*.



**Stellent Authenticated Library**

**Standard search parameters**

Results Per Page

Sort By

Sort Order

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2. Modify the settings as desired.
3. Click **Save** when edits are complete.
4. Select a search query (e.g., "What's New").  
The search results are displayed.
5. In the Info column, click the **Actions** icon.  
These Action options are displayed:
  - Content Information
  - Check Out
  - Check in Similar
  - Send Link by Email
  - HTML Rendition
6. Click **Back**.

## Stellent Authenticated Search portlet

The Stellent Authenticated Search portlet enables your portal users to perform a selected metadata and keyword search on the content server and provides read/write access to the returned content.

### Using the Stellent Authenticated Library portlet

1. On the Stellent Authenticated Library portlet, enter a search query (for example, "sample").

**Note:** Metadata fields are defined by the content server administrator. The search query is returned.

2. In the Info column, click the **Actions** icon. These Action options are displayed:
  - Content Information

- Check Out
  - Check in Similar
  - Send Link by Email
  - HTML Rendition
3. Click the **Info** icon  
The Content Info page is displayed.

**Stellent Authenticated Search** ☐ ☒ ☰

---

### Content Info

**Actions:**

Title	dc_sample [Native File] [HTML]
Content ID	DC_SAMPLE
Revision	1
Type	ADMFG
Author	rwd
Folder	
Comments	
Read Only	false
Hidden	false
Security Group	Public
Checked out by	
Status	RELEASED
Format	application/msword

---

### Revision History

Revision	Release Date	Expiration Date	Status	Action
[ 1 ]	4/21/04 2:03 PM	None	RELEASED	Delete

[Back](#)

---

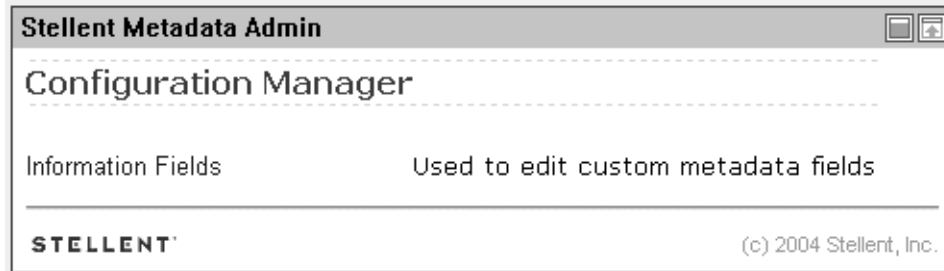
**STELLENT'** (c) 2004 Stellent, Inc.

**Note:** Actions can also be selected from the drop-down list on this page.

4. Click **Back**.

## Stellent Metadata Admin portlet

The Stellent Metadata Admin portlet enables the user to modify the properties of custom metadata.



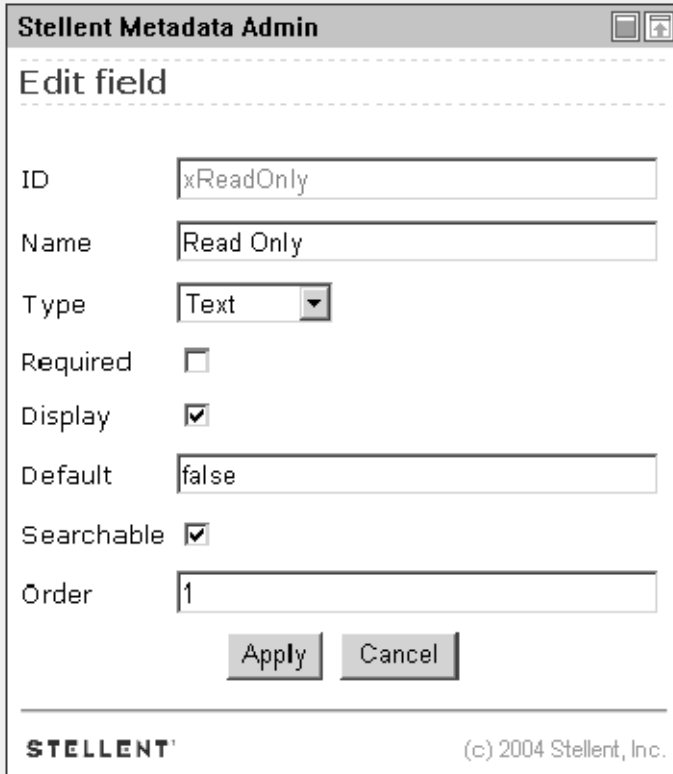
### Using the Stellent Metadata Admin portlet

1. On the Stellent Metadata Admin portlet, click **Information Fields**.  
**Note:** Information Fields are defined by the content server administrator.  
 The Information Fields list is displayed.

Property	Type	Required	Display	Default	Searchable
<b>Folder</b>	<b>Int</b>	<b>no</b>	<b>yes</b>		<b>yes</b>
Inhibit Metadata Update	Text	no	yes	false	yes
<b>Comments</b>	<b>Memo</b>	<b>no</b>	<b>yes</b>		<b>yes</b>
Trash Delete Date	Date	no	yes		no
<b>Trash Delete Location</b>	<b>Int</b>	<b>no</b>	<b>yes</b>		<b>no</b>
Trash Delete Old Name	Memo	no	yes		no
<b>Trash Deleter</b>	<b>Text</b>	<b>no</b>	<b>yes</b>		<b>no</b>
Hidden	Text	no	yes		yes
<b>Read Only</b>	<b>Text</b>	<b>no</b>	<b>yes</b>	<b>false</b>	<b>yes</b>
TemplateType	Text	no	yes		yes
<b>Website Object Type</b>	<b>Text</b>	<b>no</b>	<b>yes</b>		<b>yes</b>
Websites	Memo	no	yes		yes
<b>Exclude From Lists</b>	<b>Memo</b>	<b>no</b>	<b>yes</b>		<b>yes</b>
Searchable	Text	yes	yes	true	yes

Back

2. Select an Information Field (e.g., "Read Only").  
 The Edit Field page is displayed.



The screenshot shows a window titled "Stellent Metadata Admin" with a sub-header "Edit field". The form contains the following fields and controls:

- ID: xReadOnly
- Name: Read Only
- Type: Text (dropdown menu)
- Required:
- Display:
- Default: false
- Searchable:
- Order: 1

At the bottom of the form are two buttons: "Apply" and "Cancel". The footer of the window displays the "STELLENT" logo and the copyright notice "(c) 2004 Stellent, Inc.".

3. Make changes as desired and click **Apply** or **Cancel**.

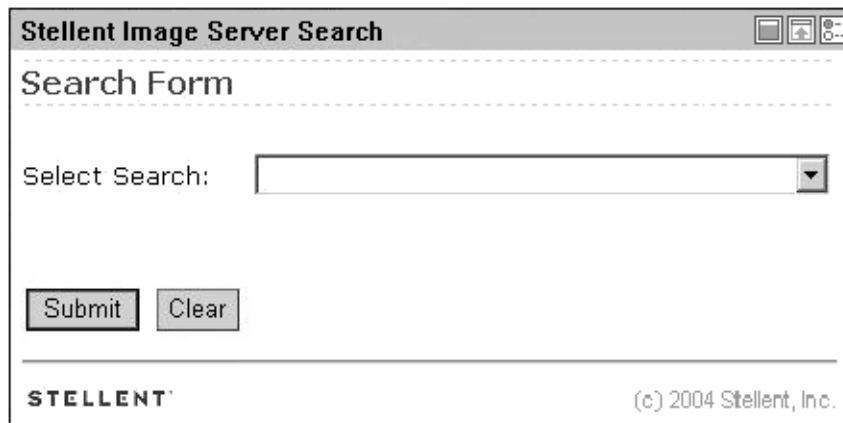


## Stellent Image Server Search portlet

The Image Server Search portlet queries the Stellent Image Server database and returns matching results. This allows the user to perform a search on the image server and permits read-only access to the returned content.

**Note:** An Stellent Image Server instance must be installed and configured (for example, the IP address of the application server must be enabled on the image server). See the CIS Installation Guide for more information.

This portlet enables your portal users to search the image server for business content. Users can search by pre-defined criteria. The results of the search are delivered to the user in a list format.



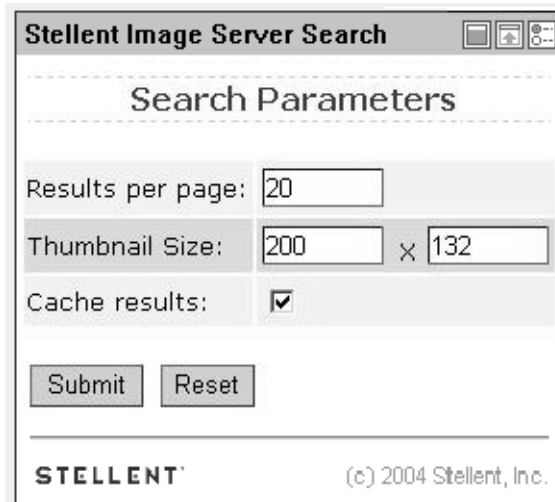
The screenshot shows a web browser window titled "Stellent Image Server Search". The window contains a "Search Form" section with a "Select Search:" label and a dropdown menu. Below the dropdown are two buttons: "Submit" and "Clear". At the bottom of the window, the "STELLENT" logo is on the left and "(c) 2004 Stellent, Inc." is on the right.

### Using the Stellent Image Server Search portlet

1. Click Stellent Image Server Search portlet, click the **Edit** icon.

This functionality allows the user to edit parameters that modify the displayed results from a search:

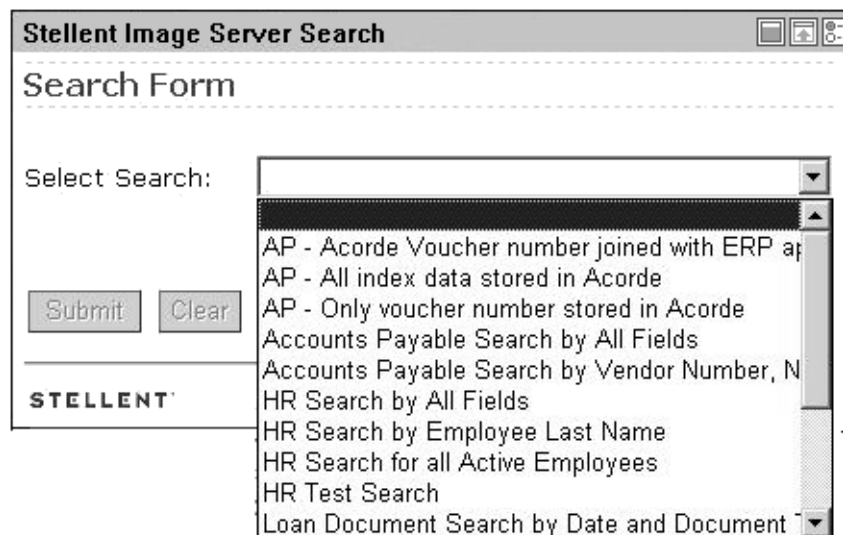
- **Results per page:** Enter the number of results to display per page.
- **Thumbnail Size:** Enter the HEIGHT and WIDTH in pixels.
- **Cache Results:** Enable the check-box if you want images to be cached.



The screenshot shows a web browser window titled "Stellent Image Server Search". Below the title bar is a section titled "Search Parameters" with a dashed border. It contains three rows of input fields: "Results per page:" with a text box containing "20"; "Thumbnail Size:" with two text boxes containing "200" and "132" separated by an "x"; and "Cache results:" with a checked checkbox. Below these fields are "Submit" and "Reset" buttons. At the bottom left is the "STELLENT" logo and at the bottom right is the copyright notice "(c) 2004 Stellent, Inc."

2. Modify the settings as desired.
3. Click **Submit** to change your settings or **Reset** to return to the default settings.
4. On the search form, select a choice from the drop-down list. In this example, the 'HR Search by All Fields' query is selected.

**Note:** The search form shows the list of predefined queries. This predefined criteria is defined in the image server. See your Stellent Image Server Installation Guide for more information.



The screenshot shows a web browser window titled "Stellent Image Server Search". Below the title bar is a section titled "Search Form" with a dashed border. It contains a "Select Search:" label next to a dropdown menu. The dropdown menu is open, showing a list of predefined queries. Below the dropdown are "Submit" and "Clear" buttons. At the bottom left is the "STELLENT" logo.

AP - Acorde Voucher number joined with ERP ap  
AP - All index data stored in Acorde  
AP - Only voucher number stored in Acorde  
Accounts Payable Search by All Fields  
Accounts Payable Search by Vendor Number, N  
HR Search by All Fields  
HR Search by Employee Last Name  
HR Search for all Active Employees  
HR Test Search  
Loan Document Search by Date and Document

5. Click **Submit**.  
A list of options associated with your selected choice from the drop-down list is displayed.

**Stellent Image Server Search**

Search Form

Select Search: HR Search by All Fields

Employee Last Name	Begins with	<input type="text"/>
Employee Number	=	<input type="text"/>
SSN	=	<input type="text"/>
Employee Status	=	<input type="text"/>
Document Date (mm/dd/yyyy)	>=	<input type="text"/>
Document Type	=	<input type="text"/>

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- Enter a query and click **Submit**.

**Note:** There must be content checked into your image server that matches the query for items to be retrieved.

The search results page is displayed.

**HR Test Search**

Displaying rows 2 - 3

EmployeeName	EmployeeNumber	SSN	EmployeeStatus	DocDate	DocType	Info
Farley, Jackson E.	10010	117904896	Active	2001-09-01T00:00:00	Medical Enrollment Form	
Farley, Jackson E.	10010	117904896	Active	2001-09-01T00:00:00	Dental Enrollment Form	
Farley, Jackson E.	10010	117904896	Active	2001-08-25T00:00:00	Personnel Action Form	
Farley, Jackson E.	10010	117904896	Active	2001-10-10T00:00:00	ESPP	
Farley, Jackson E.	10010	117904896	Active	2001-10-10T00:00:00	Stock Purchase Agreement	

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- Click **Back**.
- Click the **Info** icon.

The information page is displayed. This shows the content data and thumbnail of a specific document.



9. Click **Back**.

## Stellent Federated Search portlet

The Federated Server Search portlet queries both the Stellent Image Server and the Stellent Content Server databases (or multiple content servers, etc.). This portlet provides an integration between an image server and a content server or multiple content servers.

**Note:** Each image server or content server instance must be configured (for example, the IP address of the application server must be enabled on the image server). See the CIS Installation Guide for more information.

This portlet enables your portal users to search both the content server and the image server for business content. Users can search by subject and/or keyword. The results of the search are delivered to the user in a list format.

### Using the Stellent Federated Search portlet

1. On the Federated Search portlet, click the **Edit** icon. the Edit page shows the list of configured adapters, authentication status, and some display properties.

Adapters / Type: This allows the user to select the content servers and/or image servers to query:

- **Active Adapter:** Each content server instance is listed as an “active” adapter.
- **Fixed Adapter:** Each image server instance is listed as an “fixed” adapter.

Search Options: This allows the user to edit parameters that modify the displayed results from a search:

- **Sort By:** Select the sort criteria from the drop-down list. For example, Title, Author, Date, etc.
- **Results per adapter:** The number of results returned from each enabled adapter.
- **Results per page:** The number of results returned on each page. If more results are returned than the number defined, those results will be displayed on additional pages.

**Note:** The “Sort By” options are by the administrator in the Common Metadata Map. See the UCPM API Developer’s Guide for more information.

Adapters	Type	
<input checked="" type="checkbox"/> <a href="#">scsadapter</a>	Active Adapter	<a href="#">Logged in as 'sysadmin'</a>
<input checked="" type="checkbox"/> <a href="#">sisadapter</a>	Fixed Adapter	<a href="#">Logged in as 'sysadmin'</a>

**Search Options**

Sort By:

Results per adapter:

Results per page:

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2. Enable the desired adapters to query and modify the Search Options as desired.
3. Click **Submit**.  
The search page is displayed. This page shows a list of common metadata fields defined between adapters.
4. Enter a search query. This example uses the search query of "Farley" as author.

**Common Search Names**

Date:

Author:

Title:

ID:

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5. Click **Submit**.  
**Note:** There must be content checked into your selected content servers and/or image servers that matches the specified query for items to be retrieved.  
The search results page is displayed. This page shows the result list, the columns are defined by the common metadata fields.

Date	Author	Title	ID	Adapter	Info
2001-09-01T00:00:00	Farley, Jackson E.	Dental Enrollment Form	117904896	sisadapter	
2001-10-10T00:00:00	Farley, Jackson E.	ESPP	117904896	sisadapter	
10/20/2004 12:53 AM	Farley	Folder Test Plan	475	scsadapter	
10/20/2004 12:53 AM	Farley	JSR 170 Specification	476	scsadapter	
2001-09-01T00:00:00	Farley, Jackson E.	Medical Enrollment Form	117904896	sisadapter	
2001-08-25T00:00:00	Farley, Jackson E.	Personnel Action Form	117904896	sisadapter	
10/20/2004 12:52 AM	Farley	Portlet Whitepaper	474	scsadapter	
10/26/2004 1:04 AM	Farley	Stellent Portlet Development	476	scsadapter	
2001-10-10T00:00:00	Farley, Jackson E.	Stock Purchase Agreement	117904896	sisadapter	
10/20/2004 12:53 AM	Farley	Verity Language Docs	477	scsadapter	

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- Click the **Info** icon.

The content information page is displayed. This shows the metadata and provides access to content streams of a specific piece of content.

Content Information	
Property	Value
EmployeeName	Farley, Jackson E.
EmployeeNumber	10010
SSN	117904896
EmployeeStatus	Active
DocDate	2001-09-01T00:00:00
DocType	Dental Enrollment Form
Content Pages	
Content Name	Content Description
<a href="#">Page Number: 1</a>	Section Number: 1
<input type="button" value="Ok"/>	

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- Click **Ok**.

# Customizing the Library and Authenticated Library portlets

This section provides information on customizing the Library portlet and the Authenticated Library portlet. These portlets display the queries pre-defined by the administrator.

**Note:** These procedures are performed by an administrator and are not user configurable.

Administrators can define the business content displayed to users in the content portlet by editing the *portlet.xml* file (in the WEB-INF directory). A query string defines the parameters to search on, and any metadata field can be used to define the search query.

## To customize the Library and Authenticated Library portlets

1. Locate the StellentPortlets.war file in the WEB-INF directory.
2. Unpackage the StellentPortlets.war file (any utility such as WinZip may be used).
3. Open the portlet.xml file in a text-only editor.
4. Locate the <portlet> entries for the Library and Authenticated Library portlets (see Figure 4-1 and Figure 4-2).

---

```
<portlet>
  <description>Stellent Library Portlet</description>
  <portlet-name>stellentLibrary</portlet-name>
```

---

**Figure 4-1** The portlet.xml file: Library portlet.

---

```
<portlet>
  <description>Stellent Authenticated Library Portlet</description>
  <portlet-name>stellentAuthLibrary</portlet-name>
```

---

**Figure 4-2** The portlet.xml file: Authenticated Library portlet.

5. For either the Library or the Authenticated Library portlet, locate the <preference> entries that provide the query definitions (see Figure 4-3). To customize the portlet, you must edit the <value> entries.

---

```
<preference>
  <name>query1.title</name>
  <value>What's New</value>
</preference>
<preference>
  <name>query1.description</name>
  <value>Content from the past 30 days</value>
</preference>
<preference>
  <name>query1.query</name>
  <value>dInDate &gt; `&lt;$dateCurrent(-30)$&gt;`</value>
</preference>
```

---

**Figure 4-3** The portlet.xml file: fields to edit.



6. Edit the *title* and *description* entries (see Figure 4-4 and Figure 4-5): *title* is the search title displayed to the user; *description* is the short search description displayed to the user.

For example:

“Important Notices”

“Important messages from the president.”

---

```
<name>query3.title</name>
<value>Important Notices</value>
```

---

**Figure 4-4** The portlet.xml file: title entry edited.

---

```
<name>query3.description</name>
<value>Important messages from the company president.</value>
```

---

**Figure 4-5** The portlet.xml file: description entry edited.

7. Edit the *query* entry defined by a query string using standard XML notation (see Figure 4-6). To code a query string, use a pre-defined metadata parameter, a query string modifier, and an appropriate metadata value.

For example, define a query string that returns content items checked in by author 'president' (dDocAuthor matches president):

---

```
<name>query3.query</name>
<value>dDocAuthor &lt;matches&gt; &apos;president&apos;</value>
```

---

**Figure 4-6** The portlet.xml file: query entry edited.

Any predefined metadata parameter can be used to create commands.

For example:

- **dInDate**: the content item release date (the date the content item was released to the web).
- **dDocAuthor**: the content item author such as 'user1' or 'sysadmin'.
- **dDocType**: the content item type such as 'ADACCT' or 'FILES'.

**Note:** You must use the metadata parameter, not the field title (e.g., "dDocAuthor," not "Author").

These query string modifiers can be used:

- contains
- matches
- starts
- ends
- substring

8. When your edits are complete, save the portlets.xml file.
9. Repackage the StellentPortlets.war file.
10. Remove the currently installed portlet (if applicable).

11. Install the updated version of the edited portlet. See "Installation steps" on page 15 for more information.

**Note:** See the Stellent Portlets Developer's Guide for a presentation of the portlet dispatch framework and information on using the Stellent Portlet SDK (cps-developers-guide.pdf).

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