

STELLENT™

Content Server

**Installing and Configuring
Stellent Portlets on WebLogic®
Portal Server**

EJB-EN3-610

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INTRODUCTION

OVERVIEW

The information contained in this guide is based on Stellent Content Server 6.1. The information 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.

This section contains these topics:

- ❖ [About This Guide](#) (page 1-1)
- ❖ [Stellent Product Distinctions](#) (page 1-3)
- ❖ [If You Need Assistance](#) (page 1-4)

ABOUT THIS GUIDE

This guide documents the steps required to deploy and configure Stellent Portlets on WebLogic Portal Server. The guide assumes the reader is familiar with the WebLogic E-Business Platform. This includes the WebLogic Application Server, the WebLogic Portal Server, and the WebLogic eBusiness Control Center.

While Stellent Portlets for WebLogic Portal Server may be deployed on any WebLogic supported operating system, this deployment guide assumes a Windows NT Server

environment. In addition, this guide assumes that the sample applications included in the WebLogic Portal Server, specifically the *stockportal* application, has been installed.






Audience

This guide is intended for application developers and integrators who wish to access Stellent Content Server functions from portlets deployed on BEA WebLogic® Portal Server

Conventions

The following conventions are used throughout this guide:

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

Symbol	Description
	This is a note. It brings special attention to information.
	This is a tech tip. It identifies information that can be used to make your tasks easier.
	This is an important notice. It identifies a required step or critical information.
	This is a caution. It identifies information that might cause loss of data or serious system problems.
	This is a notice that the information is new for this release.

STELLENT PRODUCT DISTINCTIONS

In this guide, the term “content server” is used generically to refer to both the Content Server and the Collaboration Server. The following table lists the distinctions of these two Stellent content management solutions:

Product	Description
Stellent Content Server	A fully functional content management system providing end-to-end content management and personalized delivery of that content.
Stellent Collaboration Server	A fully functional content management system providing end-to-end content management and personalized delivery of that content. Additionally, a Stellent Collaboration Server license enables project-level security for collaborative authoring environments.

IF YOU NEED ASSISTANCE

If you need assistance with the installation, implementation, or use of the Stellent family of products, you can rely on a full range of support options to meet your needs.

Technical support is available from the Support Hotline at 1-888-688-TECH (1-888-688-8324). This hotline is toll-free world-wide. Callers outside the U.S. and Canada need to dial a country-specific access code. To find the access code for the country you are dialing from, go to the following Internet address:

http://www.att.com/international_business/dialing_guide/country-diallist.cgi.

You can also contact technical support by e-mail at support@stellent.com, or visit the website at <http://support.stellent.com>. You will be prompted for a username and password.

To obtain a username and password, contact the Support Hotline at 1-888-688-TECH (1-888-688-8324).

CONCEPTUAL INFORMATION

OVERVIEW

This chapter provides basic conceptual information about the integration architecture and descriptions of the available Stellent portlets.

This chapter contains these topics:

- ❖ [Integration Architecture](#) (page 2-1)
- ❖ [Stellent Portlets for WebLogic Portal Server](#) (page 2-2)

INTEGRATION ARCHITECTURE

Integration with WebLogic Portal Server

WebLogic Portal Server users access Stellent Content Server using the Service Provider Interface (SPI). This SPI enables developers to make calls to the content server from Stellent Portlets served by WebLogic Portal Server by interfacing with the integrated Stellent IdcServerBean via BEA's JSP tags (see figure 2-1). This interface enables users and developers to retrieve Stellent content based upon full text or metadata searches.

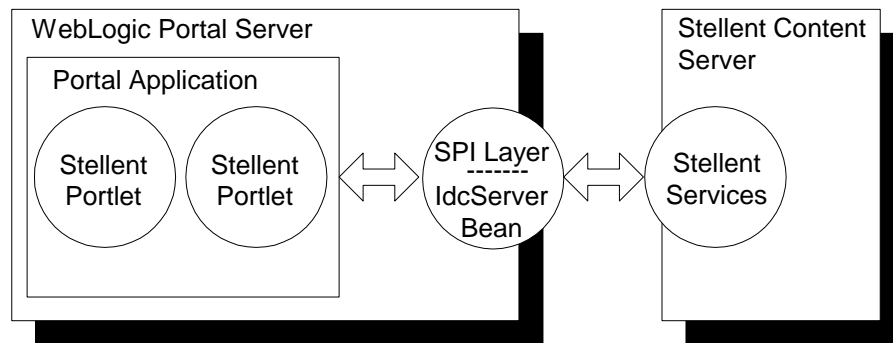


Figure 2-1 WebLogic Portal Server and Stellent Content Server integration.

STELLENT PORTLETS FOR WEBLOGIC PORTAL SERVER

Stellent Portlet Descriptions

These Stellent Portlets are available for WebSphere Portal Server:

- ❖ [Stellent Content Administration Portlet](#) (page 2-2)
- ❖ [Stellent Content Portlet](#) (page 2-3)
- ❖ [Stellent Search Portlet](#) (page 2-4)
- ❖ [Stellent Personal Search Portlet](#) (page 2-5)
- ❖ [Stellent Contribution Portlet](#) (page 2-6)
- ❖ [Stellent Workflow Inbox Portlet](#) (page 2-7)

Stellent Content Administration Portlet

The `StellentContentAdmin` portlet (see figure 2-2) enables WebLogic Portal Server administrators to define the business content displayed to the user in the `StellentContent` portal. The administration page provides fields to define business content including the result set size, sort field, sort order, and the search name to be displayed to the user. The query string defines the parameters to search on. Any metadata field can be used to define the search results. For example: *title contains 'test'* (see figure 2-3) or *Comments contains 'Updated for 2002'*.



Figure 2-2 The StellentContentAdmin portlet.

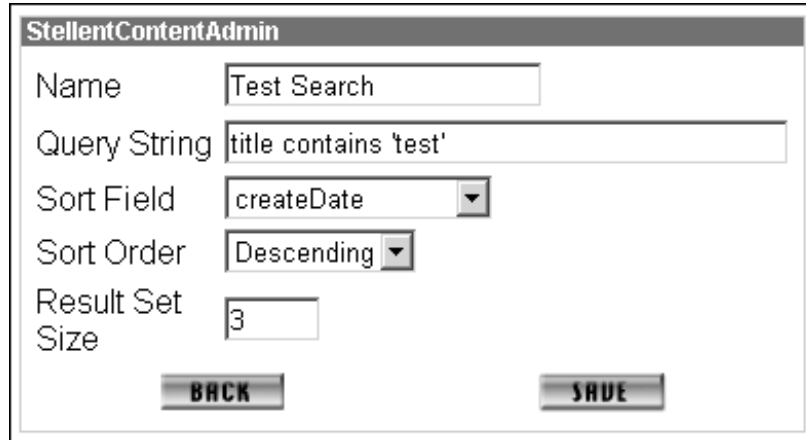


Figure 2-3 The StellentContentAdmin portlet—defined query.

Stellent Content Portlet

The StellentContent portlet (see figure 2-4) enables WebLogic Portal Server users to view content that matches criteria pre-defined by the portlet administrator. The results of the pre-defined search is 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 using the StellentContentAdmin portlet.



Figure 2-4 The StellentContent portlet.

Stellent Search Portlet

The StellentSearch portlet (see figure 2-5) enables WebLogic Portal Server users to search the Stellent Content Management repository for business content. Users can search using the content item name and/or full-text keywords. The results of the search are delivered to the user in a list format (see figure 2-6). 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 StellentPersonalSearch portlet.

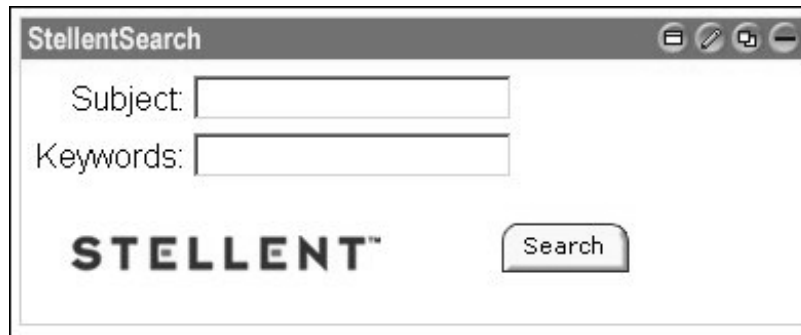


Figure 2-5 The StellentSearch portlet.

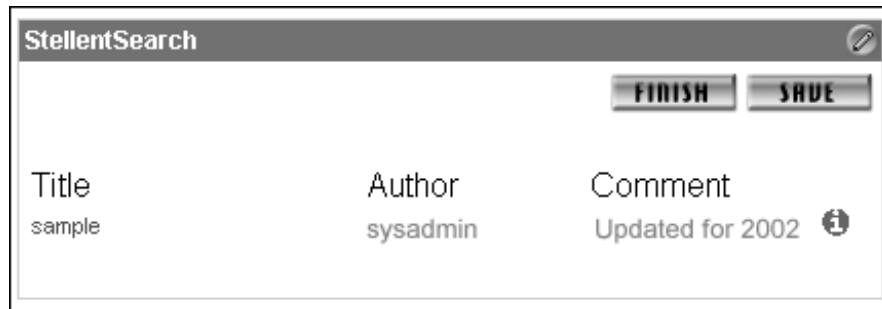


Figure 2-6 Stellent Search Portlet—search results with content.

Stellent Personal Search Portlet

The StellentPersonalSearch portlet (see figure 2-7) enables WebLogic Portal Server 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 personal search (see figure 2-8). Personal searches can be saved to the list by performing a search using the StellentSearch portlet and saving that search or by directly defining search parameters on the StellentPersonalSearch portlet.



Figure 2-7 The StellentPersonalSearch portlet—saved search.

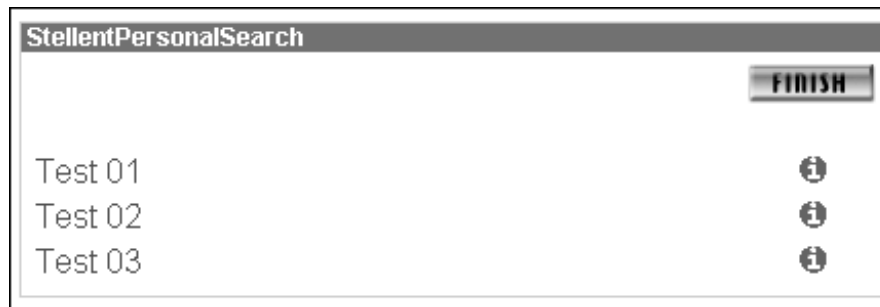


Figure 2-8 The StellentPersonalSearch portlet—saved search results.

Stellent Contribution Portlet

The StellentContribution portlet (see figure 2-9) enables WebLogic Portal Server 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 Stellent Content Server, content categorization and publishing into multiple formats (HTML, XML, WML, cHTML, and PDF) can be performed.

The screenshot shows a web form titled "StellentContribution". The form contains the following fields and controls:

- Content ID:** A text input field containing "workflowInbox".
- Type:** A dropdown menu with "Acme Sales Department" selected.
- Title:** A text input field containing "Workflow Test".
- Group:** A dropdown menu with "Public" selected.
- Account:** A dropdown menu.
- File:** A text input field containing "C:\workflowInbox.txt" and a "Browse..." button.
- Comments:** A text area containing "Updated for 2002".
- Buttons:** "Check In" and "Reset" buttons at the bottom.

Figure 2-9 The StellentContribution portlet—content submission.

Stellent Workflow Inbox Portlet

The `StellentWorkflowInbox` portlet (see figure 2-10) enables WebLogic Portal Server 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, the actions allowed, and content item information.

StellentWorkflowInbox				
Title	Workflow Info	Last Action	Actions	Info
Workflow Test	StepOne		Approve / Reject	

Figure 2-10 The `StellentWorkflowInbox` portlet— workflow item listed.

INSTALLATION ON WEBLOGIC 6

OVERVIEW

This chapter provides information required for the installation of Stellent portlets on WebLogic Portal Server version 6.0.



Note: For installation on WebLogic Portal Server version 7.0 see [Installation on WebLogic 7](#) (page 4-1).

This section covers the following topics:

- ❖ [Installation Prerequisites](#) (page 3-1)
- ❖ [Installation and Configuration](#) (page 3-3)

INSTALLATION PREREQUISITES

The following prerequisite software is required:

- ❖ Stellent™ Content Server 6.1
Refer to the *Stellent Content Server Installation Guide*.
- ❖ BEA WebLogic Application Server 6.0
- ❖ BEA WebLogic Portal Server 4.0
- ❖ BEA E-Business Control Center 4.0
- ❖ Stellent Service Provider Interface component for Weblogic 6.0 (SPI component)

❖ Stellent Portlets for BEA WebLogic Portal Server 6.0



Note: If you previously installed SPI component version 2.5 See [Uninstalling a Previous Version](#) (page 6-1) before installing the current SPI component.



Note: For testing and demonstration purposes, Stellent provides a remote Stellent Content Server located at the Stellent headquarters. This content server instance is *testportal.stellent.com* with a port of 4444. See [Using the Remote Stellent Content Server](#) (page A-1) for additional information.

Installation Notes

Follow these steps to install the required software components:

1. Install the Stellent Content Server and record the Stellent Content Server URL and Stellent User ID to use to connect to the content server.
2. Install the WebLogic Server, WebLogic Portal Server, and E-Business Control Center products using the default installation parameters.
3. Record the locations of the following application locations for future reference:
 - ❖ WebLogic Server home directory (e.g., C:/bea/wlserver6.0/).
 - ❖ WebLogic Portal Server home directory (e.g., C:/bea/wlportal4.0/).
 - ❖ WebLogic Portal Server sub-directory of the target webapp you will be installing the portlet to (e.g., C:/bea/wlportal4.0/applications/portal/stockportal/).
 - ❖ Weblogic E-Business Control Center applications directory (e.g., C:/bea/ebcc4.0/applications/).



Note: While Stellent Portlets for WebLogic Portal Server may be deployed on any WebLogic supported operating system, this deployment guide assumes a Windows NT Server environment.

INSTALLATION AND CONFIGURATION

These are the steps required to deploy the Stellent WebLogic Search portlet:

- ❖ [Configure the Portal Server](#) (page 3-3)
- ❖ [Deploy the SPI Component](#) (page 3-4)
- ❖ [Deploy the Portlets](#) (page 3-9)
- ❖ [Configure the Portal](#) (page 3-14)

Configure the Portal Server

1. Configure the WebLogic Portal Server to operate in *Development* mode by editing the *set-environment* batch file (see Figure 3-1). Set the production mode (WLS_PROD_MODE) to FALSE.

For example:

```
C:/bea/wlportal4.0/bin/win32/set-environment.bat
```

```
REM -- WLS_PROD_MODE configures WLS to run in Production
REM -- or Development mode.
REM -- It toggles the weblogic.ProductionModeEnabled.
SET WLS_PROD_MODE=false
```

Figure 3-1 The set-environment.bat file.

2. Start WebLogic Portal Server and verify that they are operating correctly.

For example:

```
C:/bea/wlportal4.0/config/portalDomain/startPortal.cmd
```

3. Launch the BEA E-Business Control Center.
4. On the E-Business Control Center, select **File—Open Application**.
The *Open Application* dialog box is displayed.
5. Using the Open Application dialog, navigate to the “portal” application.

For example:

```
C:/bea/ebcc4.0/applications/portal/
```

6. Click **Open**.

7. On the E-Business Control Center, select **Tools—Synchronize**.

The *Synchronization Setup* dialog box is displayed.

8. Select the **Connections** tab and define the display name, application name, server location, username and password.

For example:

Display Name:	Portal_Connection
Application Name:	portal
Server:	http://localhost:7501
User Name:	system
Password:	weblogic

9. Select the **Synchronization** tab, choose the appropriate Scope, and click **Connect**.

The *Synchronizing* status box is displayed.

10. When the synchronization is finished, click **Close**.

Deploy the SPI Component



Note: If you previously installed SPI component version 2.5 See [Uninstalling a Previous Version](#) (page 6-1) before installing the current SPI component.

Deploying the SPI component 6.0 consists of these steps:

- ❖ [Unpackage the SPI Component ZIP File](#) (page 3-4)
- ❖ [Install the SPI Integration Component](#) (page 3-5)
- ❖ [Edit the Associated Files](#) (page 3-6)

Unpackage the SPI Component ZIP File

Follow these steps to unpackage the SPI component:

1. Unpackage the `Stellent_BEASPI_60.zip` file to a temporary location.

For example (this example location is referenced throughout this section):

`C:/bea-spi/`

2. Review the unbundled files.

- ❖ **document.jar** - Contains the BEA standard classes and additional classes added by Stellent.
- ❖ **idc_beasys.properties** - Sample properties file. This file needs to be edited before deploying.
- ❖ **idc_mimetypes.properties** - Sample mime-type mapping file. This file is referenced in the `idc_beasys.properties` file. This file may be edited depending on your requirements.
- ❖ **BEA_INTEGRATION.zip** - The Stellent component to be installed on the Content Server. This must be installed for the integration to successfully communicate with Stellent Content Server.
- ❖ **MultiSort.zip** - The Stellent component to be installed on the Content Server to enable sorting by multiple fields. This is an optional component.

The MultiSort Component enables the standard search page to sort the search results by multiple fields. For example, it can sort the list first by title, then by release date for content with the same title.

By default, the only fields that can be searched against are the release date, the title, and the 'score'. This can be easily extended to enable sorting by custom metadata fields. To do so, follow the steps in *readme.txt* provided with the MultiSort.zip file.

Install the SPI Integration Component

The SPI integration component (`BEA_INTEGRATION.zip`) can be installed on your Stellent Content Server instance using the Component Wizard or the Admin Server Component Manager web page.

Follow these steps to install the `BEA_INTEGRATION.zip` component from the Component Manager web page:

1. Log into the content server as the system administrator and click **Administration**.
2. Under *Administration Pages*, click **Admin Server**.
3. Click the desired content server instance (e.g., `Master_on_localhost`).
4. Under *Options*, click **Component Manager**.

The *Component Manager* screen is displayed.

5. For Upload New Component, click **Browse** and navigate to the `BEA_INTEGRATION.zip` component and click **Open**.

For example:

C:/bea-spi/BEA_INTEGRATION.zip

6. Click **Upload**.
7. Select BEA_INTEGRATION from the component list and click **Enable**.



Note: At this time the MultiSort.zip component can be installed on the Content Server to enable sorting by multiple fields. This is an optional component.

8. Under *Options*, click **Stop/Start Content Server**.

The *Content Server Current Status* screen is displayed.

9. Stop and restart the content server.

Edit the Associated Files

Follow these steps to include and edit the associated SPI component files:

1. Copy the *idc_beasys.properties* and *idc_mimetypes.properties* files to the WebLogic Portal Server home directory.

For example:

Copy

C:/bea-spi/idc_beasys.properties

C:/bea-spi/idc_mimetypes.properties

to

C:/bea/wlportal4.0/

2. Open the *idc_beasys.properties* file in a text-only editor and modify these entries as needed (see Figure 3-2):
 - ❖ **xcs.url** - The URL where Stellent content server is listening. This is the Content Server URL (socket:hostname:portnumber) NOT the web server URL. Modify as needed.
 - ❖ **xcs.host** - The hostname of the machine where Stellent Content Server is running. Modify as needed.

```
xcs.url=socket:localhost:4444
xcs.host=localhost
```

Figure 3-2 The *idc_beasys.properties* file.

3. Conditional—Depending on your configuration you may need to modify the following entries. You may also add any other metadata fields that exist in your content server to this file.



Important: Custom metadata that is defined as a required field must be added to this file.

- ❖ **xcs.mode** - Determines the method in which files are transferred from the Stellent Content Server to WebLogic Portal Server. Possible values are FILE or STREAM.
 - If set to FILE, the file contents are directly retrieved and stored to a temporary location. If this value is set, *xcs.tempdir* must also be set.
 - If set to STREAM, the file contents are retrieved via the web server where Stellent Content Server is running. If this value is set, *xcs.password* must also be set.
 - ❖ **xcs.user** - The User ID used to connect to the Stellent Content Server.
 - ❖ **xcs.password** - The password for *xcs.user*. This is needed only if *xcs.mode* is set to STREAM.
 - ❖ **xcs.tempdir** - The location where temporary files are stored during file transfers. This is used only when *xcs.mode* is set to FILE. Otherwise it is ignored.
 - ❖ **xcs.dateformat** - The date format used (and sent back) by content server.
 - ❖ **xcs.refreshSchema** - Sets the time interval (in seconds) in which the Stellent schema is updated.
 - ❖ **xcs.maxResult** - Sets the maximum number of results to return in case one is not specified by the query.
 - ❖ **log.verbose** - Determines the log levels. Possible values are true, false or none.
4. Open the *idc_mimetypes.properties* file in a text-only editor and edit the mime type mappings as needed (see Figure 3-3).

For example:

C:/bea/wlportal4.0/idc_mimetypes.properties

```
# Sample mime type entries
doc=application/msword
pdf=application/pdf
xls=application/excel
```

Figure 3-3 The `idc_mimetypes.properties` file.

5. Copy the `document.jar` file into the appropriate application directory. Overwrite or delete any previous versions of `document.jar` in that directory,

For example:

```
Copy
C:/bea-spi/document.jar
to
C:/bea/wlportal4.0/applications/portal/
```

6. Open the `application-config.xml` file for your application in a text-only editor.

For example:

```
C:/bea/wlportal4.0/applications/porta/META_INF/application-config.xml
```

7. Edit the default `DocumentConnectionPool` entry in the `application-config.xml` file (see Figure 3-4).

- ❖ Change URL to “`jdbc:beasys:docmgmt:com.idc.beasys.IdcDocumentProvider`”
- ❖ Change Properties to “`idc.beasys.properties=idc_beasys.properties`”
- ❖ Change InitialCapacity to “20” (or any desired number)
- ❖ Change MaxCapacity to “20” (or any desired number)
- ❖ Change CapacityIncrement to “0” (or any desired number)

```
<DocumentConnectionPool
  Name="default "
  DriverName=" com.bea.pl3n.content.document.jdbc.Driver"
  URL=" jdbc:beasys:docmgmt:com.idc.beasys.IdcDocumentPro
  vider "
  Properties=" idc.beasys.properties=idc_beasys.propertie
  s"
  InitialCapacity=" 20 "
  MaxCapacity=" 20 "
  CapacityIncrement=" 0 "
/>
```

Figure 3-4 The application-config.xml file.

8. Save the *application-config.xml* file.
9. Stop and restart WebLogic Server.
10. Start WebLogic Portal Server.

Deploy the Portlets

Deploying the portlets consists of these steps:

- ❖ [Unpackage the Portlets ZIP File](#) (page 3-9)
- ❖ [Install the Server Component](#) (page 3-9)
- ❖ [Edit the web.xml File](#) (page 3-10)
- ❖ [Install the eBusiness Control Center Component](#) (page 3-12)

Unpackage the Portlets ZIP File

Follow these steps to unpackage the Portlets ZIP file:

1. Unpackage the Stellent Portlets for BEA WebLogic Portal Server 6.0 ZIP file (Stellent_BEA_Portlets_60.zip) to a temporary location.

For example (this example location is referenced throughout this section):

C:/bea-portlets/

2. Review the contents from the unpackaged Portlets ZIP file:
 - ❖ **svr_dist** - The server component installation folder containing JSPs and Java class files.
 - ❖ **ebcc_dist** - The eBusiness Control Center component installation folder containing the portlets and configuration files.



Note: See [Stellent Portlets for WebLogic Portal Server](#) (page 2-2) for information on portlet functionality.

Install the Server Component

Follow these steps to install and configure the required server components:

1. Copy the *applications* folder (and contents) from the *svr_dist* directory to the WebLogic Portal Server home directory. This will place the JSPs and the Java class files for the portlets into their appropriate directory.

For example:

```
Copy
C:/bea-portlets/svr_dist/applications/
to
C:/bea/wlportal4.0/
```

2. Click **Yes to All** on the *Confirm Folder Replace* dialog box. This adds new files to the WebLogic Portal Server *applications* directory without deleting existing files.

Edit the web.xml File

Follow these steps to edit the stockportal *web.xml* file:

1. Open the WebLogic Portal Server *web.xml* file for the stockportal application in a text-only editor.

For example:

```
C:/bea/wlportal4.0/applications/portal/stockportal/WEB-INF/web.xml
```

2. Add the complete web location (HttpWebRoot), the content server connection information (IdcReference), and the content server user (IdcUser) as context parameters to the *web.xml* file (see Figure 3-5).

For example:

```
HttpWebRoot:      http://localhost/stellent/
IdcReference:     socket:localhost:4444
IdcUser:          guest
```



Note: Enter parameter values appropriate for the Stellent Content Server instance that will be serving the portal content.



Note: For testing and demonstration purposes, Stellent provides a remote Stellent Content Server located at the Stellent headquarters. This content server instance is *testportal.stellent.com* with a port of 4444. See [Using the Remote Stellent Content Server](#) (page A-1) for additional information.



Important: Do not overwrite existing `<context-param>` entries.

```

<!-- Stellent Parameters -->
<context-param>
  <param-name>HttpWebRoot</param-name>
  <param-value>http://localhost/stellent/</param-value>
</context-param>
<context-param>
  <param-name>IdcReference</param-name>
  <param-value>socket:localhost:4444</param-value>
</context-param>
<context-param>
  <param-name>IdcUser</param-name>
  <param-value>guest</param-value>
</context-param>

```

Figure 3-5 The `web.xml` file *Stellent Content Server* parameters.

3. Add the Stellent Tag Library URI and location to the `taglib` parameters of the `web.xml` file (see Figure 3-6).



Important: Do not overwrite existing `<taglib>` entries.

```

<!-- Stellent Tag Libraries -->
<taglib>
  <taglib-uri>stellent.tld</taglib-uri>
  <taglib-location>/WEB-INF/stellent.tld
  </taglib-location>
</taglib>

```

Figure 3-6 The `web.xml` file *Stellent Tag Library* parameters.

4. Add the Stellent GetFile Servlet name, class, and mapping information to the servlet parameters of the `web.xml` file (see Figure 3-7).



Note: Adding this reference to the *web.xml* file enables GetFileServlet to establish a connection to the Stellent Content Server instance and download a content item through the portal interface.



Important: Do not overwrite existing `<servlet>` entries.

```
<!-- Stellent GetFile Servlet-->
<servlet>
  <servlet-name>getfile</servlet-name>
  <servlet-class>idcbean.taglib.GetFileServlet
  </servlet-class>
</servlet>
<servlet-mapping>
  <servlet-name>getfile</servlet-name>
  <url-pattern>/getfile/*</url-pattern>
</servlet-mapping>
```

Figure 3-7 The *web.xml* file *Stellent GetFile Servlet* parameters.

5. Save the *web.xml* file.
6. Restart WebLogic Portal Server

Install the eBusiness Control Center Component

Follow these steps to install and configure the required eBusiness Control Center components:

1. Copy the *applications* folder (and contents) from the *ebcc_dist* directory to the EBCC home directory. This will place the portlets and configuration files into their appropriate directory.

For example:

```
Copy
C:/bea-portlets/ebcc_dist/applications/
to
C:/bea/ebcc14.0/
```

2. Click **Yes to All** on the *Confirm Folder Replace* dialog box. This will add new files to the WebLogic Portal Server applications directory without deleting existing files.

3. Open the stockportal applications main configuration file in the E-Business Control Centers applications directory with a text editor.

For example:

```
C:/bea/ebcc4.0/applications/portal/application-
sync/webapps/stockportal/StockPortal.portal
```

4. Add the Stellent entry to the <property-set-pool> tag (see Figure 3-8).



Important: Do not overwrite existing <property-set-pool> entries.

```
<property-set-pool>
  <property-set-name>StockPortal</property-set-name>
  <property-set-name>Stellent</property-set-name>
</property-set-pool>
```

Figure 3-8 The StockPortal.portal file <property-set-pool> tag.

5. Add the Stellent portlet names as entries to the <portlet-pool> tag (see Figure 3-9).



Important: Do not overwrite existing <portlet-pool> entries.

```
<portlet-pool>
  <portlet-name>StellentSearch</portlet-name>
  <portlet-name>StellentContent</portlet-name>
  <portlet-name>StellentContribution</portlet-name>
  <portlet-name>StellentPersonalSearch</portlet-name>
  <portlet-name>StellentWorkflowInbox</portlet-name>
  <portlet-name>StellentContentAdmin</portlet-name>
</portlet-pool>
```

Figure 3-9 The StockPortal.portal file <portlet-pool> entry.

6. Save the *StockPortal.portal* file.

Configure the Portal

Use the E-Business Control Center to complete portal configuration.

Configuring the portal consists of these steps:

- ❖ [Open the Portal Application](#) (page 3-14)
- ❖ [Edit the Home Page](#) (page 3-14)
- ❖ [Configure the Page Layout](#) (page 3-15)
- ❖ [Synchronize the Configuration](#) (page 3-15)

Open the Portal Application

1. Launch the BEA E-Business Control Center.
2. On the E-Business Control Center, select **File—Open Application**.
The *Open Application* dialog box is displayed.
3. Using the Open Application dialog, navigate to the “portal” application.
For example:
C:/bea/ebcc4.0/applications/portal/
4. Click **Open**.
5. Display the list of available portals by clicking on the **Portal** icon.
6. Open the *stockportal* portal by clicking on **StockPortal** from the list of available portals.
The *Portal Editor* is displayed with information for StockPortal.

Edit the Home Page

1. On the *Editor [Portal StockPortal]* screen, display the list of the available pages in the portlet by clicking on **Pages**.
2. Open the definition for the *home* page by selecting it and clicking **Edit**.
The *Page Definition* dialog box is displayed.
3. Add all of the Stellent Portlets to the *home* page by selecting the portlets from the *Available portlets* list and clicking **Add**.
4. Optional—remove the non-Stellent portlets by selecting those portlets from the *Selected portlets* list and clicking **Remove**.

5. Save the page definition by clicking **OK**.

Configure the Page Layout

1. On the *Editor [Portal StockPortal]* screen, display the portal defaults by clicking on **Defaults**.
2. Display the defaults for the home page by selecting *home* from the list of portal pages.
3. Edit the *home* page defaults by enabling the **Available** and **Visible** options.
4. Select the desired Default Layout from the list.
5. Click **OK** to save the page layout.
6. Save the file by selecting **File—Save** from the EBCC main menu.

Synchronize the Configuration

1. Select **Tools—Synchronize** from the EBCC main menu.

This deploys the portal configuration changes to the server by synchronizing with the Weblogic Portal Server webapp.

2. When the synchronization is finished, click **Close**.
3. Close the file by selecting **File—Close** from the EBCC main menu.
4. Exit the E-Business Control Center by selecting **File—Exit** from the EBCC main menu.



Note: See [Using the Stellent Portlets \(page 5-1\)](#) to explore the functionality of the portlets.

INSTALLATION ON WEBLOGIC 7

OVERVIEW

This chapter provides information required for the installation of Stellent portlets on WebLogic Portal Server version 7.0.



Note: For installation on WebLogic Portal Server version 6.0 see [Installation on WebLogic 6](#) (page 3-1).

This section covers the following topics:

- ❖ [Installation Prerequisites](#) (page 4-1)
- ❖ [Content Server Configuration](#) (page 4-2)
- ❖ [WebLogic Configuration](#) (page 4-5)

INSTALLATION PREREQUISITES

The following prerequisite software is required:

- ❖ Stellent™ Content Server 6.1
Refer to the *Stellent Content Server Installation Guide*.
- ❖ BEA WebLogic Portal Server 7.0 and BEA E-Business Control Center
- ❖ Stellent Service Provider Interface component for WebLogic 7.0 (SPI component)
- ❖ Stellent Portlets for BEA WebLogic Portal Server 7.0



Note: For testing and demonstration purposes, Stellent provides a remote Stellent Content Server located at the Stellent headquarters. This content server instance is *testportal.stellent.com* with a port of 4444. See [Using the Remote Stellent Content Server](#) (page A-1) for additional information.



Note: While Stellent Portlets for WebLogic Portal Server may be deployed on any WebLogic supported operating system, this deployment guide assumes a Windows NT Server environment.

CONTENT SERVER CONFIGURATION

These are the steps for configuring the content server to integrate with the Stellent portlets on WebLogic:

- ❖ [Set the IP Filter and Security](#) (page 4-2)
- ❖ [Install the SPI Component ZIP File](#) (page 4-3)

Set the IP Filter and Security

A trust relationship between your JSP server/servlet engine and your content server instance needs to be established by setting the IP Address Filter for your content server. This allows the JSP server/servlet engine to validate the user, and the content server to trust that the user has been validated.

If the JSP server/servlet engine is running on the same computer as the content server, the trust is implied, and probably will not need to be explicitly set. However, because some networks are not set up with robust DNS support, you may still need to perform these steps.

Follow these steps to define the IP address of the BEA server:

1. Determine the IP address of your JSP server/servlet engine.
2. Open the **System Properties** utility for your content server.
3. Select the **Server** tab.
4. Add the IP address of the BEA server to the IP Address Filter.

When defining an IP address, the asterisk (*) can be used as a wildcard. However the IP address must take the form "x.x.x.x" regardless of wildcards. In addition, each IP address must be separated by a vertical bar.

For example:

12.34.56.*|12.34.57.*|12.34.58.*|12.34.59.*

5. Select the **Content Security** tab.
6. Enable the **Allow get copy for user with read privilege** option.

If this option is not enabled, content items cannot be downloaded and an error message that the user does not have appropriate privilege will be displayed.

7. Click **OK**.



Important: You must also synchronize usernames between the content server and the portal server by creating a user in the content server for every user in the portal server. Refer to the *Stellent Content Server Administration Guide* for information on adding users.

8. Stop and restart the content server.

Install the SPI Component ZIP File

The SPI integration component (BEA_INTEGRATION.zip) can be installed on your Stellent Content Server instance using the Component Wizard or the Admin Server Component Manager web page.

Follow these steps too unpackage and to install the SPI component from the Component Manager web page:

1. Unpackage the `Stellent_BEA_SPI_70.zip` file to a temporary location.

For example (this example location is referenced throughout this section):

`C:/stellent-spi/`

2. Review the unbundled files.
 - ❖ **document.jar** - Contains the BEA standard classes and additional classes added by Stellent.
 - ❖ **idc_beasys.properties** - Sample properties file. This file needs to be edited before deploying.
 - ❖ **idc_mimetypes.properties** - Sample mime-type mapping file. This file is referenced in the `idc_beasys.properties` file. This file may need to be edited depending on your requirements.

- ❖ **BEA_INTEGRATION.zip** - The Stellent component to be installed on the Content Server. This must be installed for the integration to successfully communicate with Stellent Content Server.
- ❖ **MultiSort.zip** - The Stellent component to be installed on the Content Server to enable sorting by multiple fields. This is an optional component.

The MultiSort Component enables the standard search page to sort the search results by multiple fields. For example, it can sort the list first by title, then by release date for content with the same title.

By default, the only fields that can be searched against are the release date, the title, and the 'score'. This can be easily extended to enable sorting by custom metadata fields. To do so, follow the steps in *readme.txt* provided with the MultiSort.zip file.

- ❖ **test.jsp** - A simple JSP page that shows the basics for running an SPI query. It can be used to test the integration, or test the performance of a SPI query.

3. Log into the content server as the system administrator and click **Administration**.
4. Under *Administration Pages*, click **Admin Server**.
5. Click the desired content server instance (e.g., Master_on_localhost).
6. Under *Options*, click **Component Manager**.

The *Component Manager* screen is displayed.

7. For Upload New Component, click **Browse** and navigate to the BEA_INTEGRATION.zip component and click **Open**.

For example:

C:/stellent-spi/BEA_INTEGRATION.zip

8. Click **Upload**.
9. Select BEA_INTEGRATION from the component list and click **Enable**.



Note: At this time the MultiSort.zip component can be installed on the Content Server to enable sorting by multiple fields. This is an optional component.

10. Under *Options*, click **Stop/Start Content Server**.

The *Content Server Current Status* screen is displayed.

11. Stop and restart the content server.

WEBLOGIC CONFIGURATION

Follow these steps to install and configure the stellent portlets and associated files:

- ❖ [Edit the Integration Files](#) (page 4-5)
- ❖ [Install the Portlets and Server Components](#) (page 4-8)
- ❖ [Configure the Page Display and Synchronize](#) (page 4-9)
- ❖ [Edit the web.xml File](#) (page 4-11)
- ❖ [Define Portal Groups and Administrator](#) (page 4-13)

Edit the Integration Files

Follow these steps to include and edit the associated integration files:

1. Stop WebLogic Portal Server 7.0.
2. Copy the *idc_beasys.properties* and *idc_mimetypes.properties* files to the directory for the appropriate portal application and domain

For example:

```
Copy
C:/stellent-spi/idc_beasys.properties
C:/stellent-spi/idc_mimetypes.properties
to
C:/bea/weblogic700//samples/portal/sampleportalDomain/
```



Note: These steps assume that the *Stellent_BEA_SPI_70.zip* file was unpackaged to a temporary location (e.g., *C:/stellent-spi/*) and that the SPI integration component has been installed. See [Content Server Configuration](#) (page 4-2) for additional information.

3. Open the *idc_beasys.properties* file in a text-only editor and modify these entries as needed (see figure 4-10):
 - ❖ **xcs.url** - The URL where Stellent content server is listening. This is the Content Server URL (socket:hostname:portnumber) NOT the web server URL. Modify as needed.
 - ❖ **xcs.host** - The hostname of the machine where Stellent Content Server is running. Modify as needed.

```
xcs.url=socket:localhost:4444  
xcs.host=localhost
```

Figure 4-10 The `idc_beasys.properties` file.

4. Conditional—Depending on your configuration you may need to modify the following entries. You may also add any other metadata fields that exist in your content server to this file.



Important: Custom metadata that is defined as a required field must be added to this file.

- ❖ **xcs.mode** - Determines the method in which files are transferred from the Stellent Content Server to WebLogic Portal Server. Possible values are FILE or STREAM.
 - If set to FILE, the file contents are directly retrieved and stored to a temporary location. If this value is set, *xcs.tempdir* must also be set.
 - If set to STREAM, the file contents are retrieved via the web server where Stellent Content Server is running. If this value is set, *xcs.password* must also be set.
 - ❖ **xcs.user** - The User ID used to connect to the Stellent Content Server. This entry defines access to the StellentContent portlet via the SPI layer.
 - ❖ **xcs.password** - The password for *xcs.user*. This is needed only if *xcs.mode* is set to STREAM.
 - ❖ **xcs.tempdir** - The location where temporary files are stored during file transfers. This is used only when *xcs.mode* is set to FILE. Otherwise it is ignored.
 - ❖ **xcs.dateformat** - The date format used (and sent back) by content server.
 - ❖ **xcs.refreshSchema** - Sets the time interval (in seconds) in which the Stellent schema is updated.
 - ❖ **xcs.maxResult** - Sets the maximum number of results to return in case one is not specified by the query.
 - ❖ **log.verbose** - Determines the log levels. Possible values are true, false or none.
5. Open the *idc_mimetypes.properties* file in a text-only editor and edit the mime type mappings as needed (see figure 4-11).

For example:

```
C:/bea/weblogic700//samples/portal/sampleportalDomain/idc_mimetypes.properties
```



```
# Sample mime type entries
doc=application/msword
pdf=application/pdf
xls=application/excel
```

Figure 4-11 The `idc_mimetypes.properties` file.

6. Copy the `document.jar` file into the appropriate application directory. Overwrite or delete any previous versions of `document.jar` in that directory,

For example:

Copy

`C:/stellent-spi/document.jar`

to

`C:/bea/weblogic700/samples/portal/sampleportalDomain/beaApps/sampleportal/`

7. Open the `application-config.xml` file for your application in a text-only editor.

For example:

`C:/bea/weblogic700/samples/portal/sampleportalDomain/beaApps/sampleportal/META-INF/application-config.xml`

8. Edit the default `DocumentConnectionPool` entry in the `application-config.xml` file (see figure 4-12).



Note: Depending on your configuration, there may be several `DocumentConnectionPool` entries. Edit the `DocumentConnectionPool` entry for `Name="default"`.

- ❖ Change URL to “`jdbc:beasys:docmgmt:com.idc.beasys.IdcDocumentProvider`”
- ❖ Change Properties to “`idc.beasys.properties=idc_beasys.properties`”
- ❖ Change `InitialCapacity` to “20” (or any desired number)
- ❖ Change `MaxCapacity` to “20” (or any desired number)
- ❖ Change `CapacityIncrement` to “0” (or any desired number)

```
<DocumentConnectionPool
  Name="default "
  DriverName="com.bea.pl3n.content.document.jdbc.Driver"
  URL="jdbc:beasys:docmgmt:com.idc.beasys.IdcDocumentProvider"
  Properties="idc.beasys.properties=idc_beasys.properties"
  InitialCapacity="20"
  MaxCapacity="20"
  CapacityIncrement="0"
/>
```

Figure 4-12 The application-config.xml file.

9. Save the *application-config.xml* file.
10. Start WebLogic Portal Server 7.0.

Install the Portlets and Server Components

Follow these steps to install and configure the portlets and server components:

1. Unpackage the Stellent Portlets for BEA WebLogic Portal Server 7.0 ZIP file (Stellent_BEA_Portlets_70.zip) to a temporary location.

For example (this example location is referenced throughout this section):

C:/stellent-portlets/

2. Copy the *samples* folder (and contents) to the WebLogic Portal Server 7.0 directory. This will place the JSPs, Java class files, and portlets into their appropriate directory.

For example:

Copy

C:/stellent-portlets/samples/

to

C:/bea/weblogic700/

3. Click **Yes to All** on the *Confirm Folder Replace* dialog box. This adds new files to the appropriate sub-directories without deleting existing files.

Configure the Page Display and Synchronize

Follow these steps to add the portlets to the portal application, set the page defaults and the displayed portlets, and synchronize the configuration.

1. Launch the BEA E-Business Control Center.
2. On the E-Business Control Center, select **File—Open Application**.
The *Open Application* dialog box is displayed.
3. Using the Open Application dialog, navigate to the portal application.
For example:
C:/bea/weblogic700/samples/portal/sampleportalDomain/beaApps/sampleportal-project/sampleportal-project.eaprx
4. Click **Open**.
5. Select the **Presentation** tab.
6. Expand the **General** pane.
7. Display the list of available portals by clicking on the **Portal** icon.
8. Open the *sampleportal* portal by clicking on **sampleportal** from the list of available portals.
The *Portal Editor* is displayed with information for the sampleportal.
9. Select a Stellent portlet and add it to the portal application. Continue adding Stellent portlets until all portlets are added.
For example:
StellentSearch
StellentContent
StellentContribution
StellentPersonalSearch
StellentWorkflowInbox
StellentContentAdmin
10. On the *Editor [Portal sampleportal]* screen, display the list of the available pages in the portlet by clicking on **Pages**.
11. Open the definition for the *home* page by selecting it and clicking **Edit**.
The *Page Definition* dialog box is displayed.

12. Add all of the Stellent Portlets to the *home* page by selecting the portlets from the *Available portlets* list and clicking **Add**.
13. Optional—remove the non-Stellent portlets by selecting those portlets from the *Selected portlets* list and clicking **Remove**.
14. Save the page definition by clicking **OK**.
15. On the *Editor [Portal sampleportal]* screen, display the portal defaults by clicking on **Defaults**.
16. Display the defaults for the home page by selecting *home* from the list of portal pages.
17. Edit the *home* page defaults by enabling the **Available** and **Visible** options.
18. Select the desired Default Layout from the list.
19. Click **OK** to save the page layout.
20. Optional—Enable the **Login required** option to restrict access to selected portlets.



Tech Tip: Depending on your configuration, you may choose to enable the **Login required** option for all portlets except the StellentSearch and StellentContent portlets.

21. Save the file by selecting **File—Save** from the EBCC main menu.
22. Select **Tools—Synchronize** from the EBCC main menu.

This deploys the portal configuration changes to the server by synchronizing with the Weblogic Portal Server webapp.
23. Click **Cancel** when prompted to reset the campaign.
24. When the synchronization is finished, click **Close**.
25. Close the file by selecting **File—Close** from the EBCC main menu.
26. Exit the E-Business Control Center by selecting **File—Exit** from the EBCC main menu.

Edit the web.xml File

Follow these steps to edit the sampleportal *web.xml* file:

1. Open the WebLogic Portal Server *web.xml* file for the sampleportal application in a text-only editor.

For example:

```
C:/bea/weblogic700/samples/portal/sampleportalDomain/beaApps/sampleportal/sampleportal//WEB-INF/web.xml
```

2. Add the complete web location (HttpWebRoot), the content server connection information (IdcReference), and the content server user (IdcUser) as context parameters to the *web.xml* file (see figure 4-13).

For example:

```
HttpWebRoot:      http://localhost/stellent/
IdcReference:     socket:localhost:4444
IdcUser:         guest
```



Note: Enter parameter values appropriate for the Stellent Content Server instance that will be serving the portal content.



Note: For testing and demonstration purposes, Stellent provides a remote Stellent Content Server located at the Stellent headquarters. This content server instance is *testportal.stellent.com* with a port of 4444. See [Using the Remote Stellent Content Server](#) (page A-1) for additional information.



Important: Do not overwrite existing `<context-param>` entries.

```
<!-- Stellent Parameters -->
<context-param>
  <param-name>HttpWebRoot</param-name>
  <param-value>http://localhost/stellent/</param-value>
</context-param>
<context-param>
  <param-name>IdcReference</param-name>
  <param-value>socket:localhost:4444</param-value>
</context-param>
<context-param>
  <param-name>IdcUser</param-name>
  <param-value>guest</param-value>
</context-param>
```

Figure 4-13 The web.xml file *Stellent Content Server* parameters.

3. Add the Stellent Tag Library URI and location to the taglib parameters of the *web.xml* file (see figure 4-14).



Important: Do not overwrite existing <taglib> entries.

```
<!-- Stellent Tag Libraries -->
<taglib>
  <taglib-uri>stellent.tld</taglib-uri>
  <taglib-location>/WEB-INF/stellent.tld
  </taglib-location>
</taglib>
```

Figure 4-14 The web.xml file *Stellent Tag Library* parameters.

4. Add the Stellent GetFile Servlet name, class, and mapping information to the servlet parameters of the *web.xml* file (see figure 4-15).



Note: Adding this reference to the *web.xml* file enables GetFileServlet to establish a connection to the Stellent Content Server instance and download a content item through the portal interface.



Important: Do not overwrite existing `<servlet>` entries.

```

<!-- Stellent GetFile Servlet-->
<servlet>
  <servlet-name>getfile</servlet-name>
  <servlet-class>idcbean.taglib.GetFileServlet
  </servlet-class>
</servlet>
<servlet-mapping>
  <servlet-name>getfile</servlet-name>
  <url-pattern>/getfile/*</url-pattern>
</servlet-mapping>

```

Figure 4-15 The web.xml file *Stellent GetFile Servlet* parameters.

5. Save the web.xml file.
6. Restart WebLogic Portal Server 7.0.



Note: See [Using the Stellent Portlets](#) (page 5-1) to explore the functionality of the Stellent portlets.

Define Portal Groups and Administrator

Follow these steps to define the portal groups and administrator:

1. On your BEA server, open the WebLogic Administration Tools Home Page.

For example:

`http://localhost:7501/sampleportalTools`

2. Enter an Administrator ID and Password.

The WebLogic Portal defaults are *administrator* (Administrator ID) and *password* (Password).

3. Click **OK**.

The sample portal administrative page is displayed.

4. Click the **Portal Management** link.

5. On the Portal Management Home page, click **Avitek Portal (everyone)**.
6. Click **Manage Pages and Portlets**.
7. For the *Home* page, click **Edit Portlets**.
8. Set the attributes for the user portlets by selecting each stellent portlet and clicking **Set Attributes**. Do not select the StellentContentAdmin portlet.
9. Select the **Available** and **Visible** attributes and any additional attributes for your configuration.
10. Click **Save**. Repeat these steps to set the attributes for all of the user portlets.



Note: Do not include the StellentContentAdmin portlet. This is an administration portlet.

11. When the attributes have been set for each user portlet, click the **Portal Management** link to return to the Portal Management Home page.
12. Click **Avitek Users**.
13. Click **Manage Pages and Portlets**.
14. For the *Home* page, click **Edit Portlets**.
15. Set the attributes for the user portlets by selecting each stellent portlet and clicking **Set Attributes**. Do not select the StellentContentAdmin portlet.
16. Select the **Available** and **Visible** attributes and any additional attributes for your configuration. Repeat these steps to set the attributes for all of the user portlets.
17. Click **Save**. Repeat these steps to set the attributes for all of the user portlets.



Note: Do not include the StellentContentAdmin portlet. This is an administration portlet.

18. When the attributes have been set for each user portlet, click the **Portal Management** link to return to the Portal Management Home page.
19. Click **Create Group Portal**. These steps create a secure portal group that has access to the Content Admin portal.
20. Assign a Display Name (e.g., *Avitek Admins*).
21. Click **Browse User Groups**.

22. Select an Administrator group (e.g., *Administrators*).
23. Click **Browse Templates**.
24. Click **Avitek Users**.
25. Enable the **Copy Entitlements from Avitek Users** and **Copy Group Administrators from Avitek Users** options.
26. Click **Save**.
27. On the Portal Management Home page, click **Avitek Admins (Administrators)**.
28. Click **Manage Pages and Portlets**.
29. For the *Home* page, click **Edit Portlets**.
30. Set the attributes for the administrative portlet by selecting the *StellentContentAdmin* portlet and clicking **Set Attributes**.
31. Select the **Available** and **Visible** attributes.
32. Click **Save**.



Tech Tip: Depending on your configuration, it may also be desirable to restrict the Workflow and Contribution portlets in a similar fashion.

The *StellentContentAdmin* portlet is now accessible when logged in as an administrator (i.e., 'system'). Other users can be given permission to administer this portal group by accessing the Group Portal Management Home page, clicking the *Edit Delegated Administration Settings for Group Administrators* link, and clicking **Create New Administrator**. Any users added as an administrator must be a part of a delegated administrator group



Note: See [Using the Stellent Portlets](#) (page 5-1) to explore the functionality of the Stellent portlets.

USING THE STELLENT PORTLETS

OVERVIEW

This chapter provides information for the test of the Stellent portlets configured in the BEA sample stockportal. 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 (defined in the EBCC portal editor).

This section covers the following topics:

- ❖ [Access the Sample Portal](#) (page 5-1)
- ❖ [Explore the Administration Portlet](#) (page 5-3)
- ❖ [Explore the User Portlets](#) (page 5-7)



Note: See [Stellent Portlets for WebLogic Portal Server](#) (page 2-2) for descriptions of Stellent portlet functionality.

ACCESS THE SAMPLE PORTAL

1. Open the WebLogic Portal example (sample portal).

This can be accessed using any of these methods:

- ❖ From the Start menu (BEA WebLogic E-Business Platform—BEA WebLogic Portal—WebLogic Portal Example).









- ❖ From the *Welcome to WebLogic Portal* default page opened in a browser (e.g., <http://localhost:7501/index.jsp>) by clicking on **View the basic sample portal**).
- ❖ From a browser by entering the complete URL to the default page (e.g., <http://localhost:7501/sampleportal/index.jsp>).

2. On the example portal default page, click **LOGIN**.

The *Portal Login* screen is displayed.

Portlet Controls

These icons are used by the portlets for navigation:

Icon	Name	Description
	Help	Opens a Help window.
	Maximize	Maximizes the Portlet to the full size of the browser window.
	Unmaximize	Returns a maximized portlet to its original size.
	Edit	Opens the portlet for editing.
	Finished	Closes the portlet from editing.
	Float	Opens the portlet in a separate browser window.
	Minimize	Minimizes the portlet so that only the Title is displayed.
	Restore	Returns the minimized portlet to its original size.

EXPLORE THE ADMINISTRATION PORTLET

Configure the Administration Portlet

Follow these steps to log in as an administrator and configure the Stellent administration portlet:

1. On the *Portal Login* screen, enter an Administrator ID and Password.
The WebLogic Portal defaults are *administrator* (Administrator ID) and *password* (Password).
2. Click **Login**.
The sample portal default page is displayed.
3. Click **CUSTOMIZE MY PORTAL**.
4. For the *home* page click **Portlets**.
The *Select and Order Portlets* screen is displayed.
5. Select StellentContentAdmin portlet from the *Available Portlets* list and click the arrows to move the portlet to the desired column of the *Visible Portlets* list.
6. Click **SAVE**.
7. Click **RETURN TO PORTAL**.
8. Click the **HOME** tab to view the displayed Stellent Content Administration portlet.

Test the StellentContentAdmin Portlet

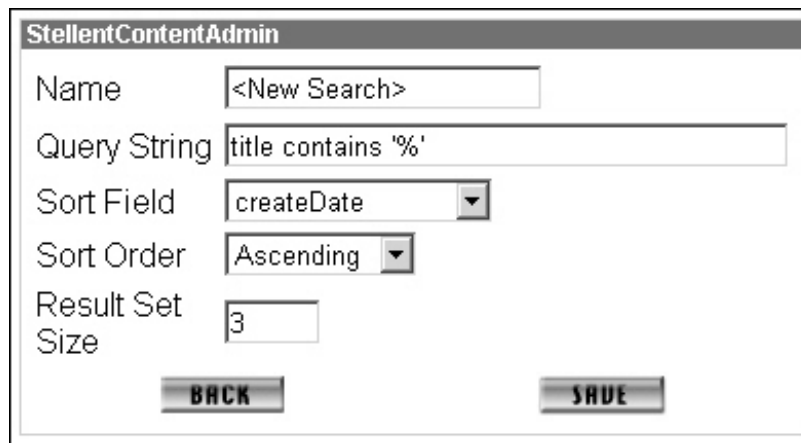
The Stellent Content Administration portlet enables an administrator to define business content to be displayed to the user (see figure 5-16).



Figure 5-16 The StellentContentAdmin portlet.

1. Click the StellentContentAdmin **CREATE** button.
These values can be modified by the administrator to define how the business content is displayed to the user (see figure 5-17).
 - ❖ **Name** - Enter the search name to be displayed to the user.

- ❖ **Query String** - The query string to search on. Any metadata field can be used to define the search results.
For example:
title contains 'test'
Comments contains 'Updated for 2002'
- ❖ **Sort Field** - Select the field to sort on (e.g., title, author, status, etc.)
- ❖ **Sort Order** - Options are *Ascending* or *Descending*.
- ❖ **Result Set Size** - The number of search results displayed.



The screenshot shows a web form titled "StellentContentAdmin". It contains the following fields and controls:

- Name:** A text input field containing "<New Search>".
- Query String:** A text input field containing "title contains '%'" (with a closing quote).
- Sort Field:** A dropdown menu with "createDate" selected.
- Sort Order:** A dropdown menu with "Ascending" selected.
- Result Set Size:** A text input field containing the number "3".
- Buttons:** Two buttons labeled "BACK" and "SAVE" are located at the bottom of the form.

Figure 5-17 The StellentContentAdmin portlet—saved search settings.

2. Enter a query name, a query string, and define the search results display settings. This example query searches for content items with the word *test* in the title (see figure 5-18).

Figure 5-18 The StellentContentAdmin portlet—defined query.



Note: To have results returned you must define a query that references content actually checked in to your content server instance.

3. Click **SAVE** when edits are complete.

These options are displayed (see figure 5-19):

- ❖ **Activate Search** - Enables the business content saved search on the user StellentContent portlet.
- ❖ **Properties** - Provides the business content saved search settings.
- ❖ **Delete** - Deletes this business content saved search.

Figure 5-19 The StellentContentAdmin portlet—saved search.

4. Click the StellentContentAdmin **CREATE** button.
5. Enter a query name, a query string, and define the search results display settings. This example query searches for content items with the string *Updated for 2002* in the Comments (see figure 5-20).

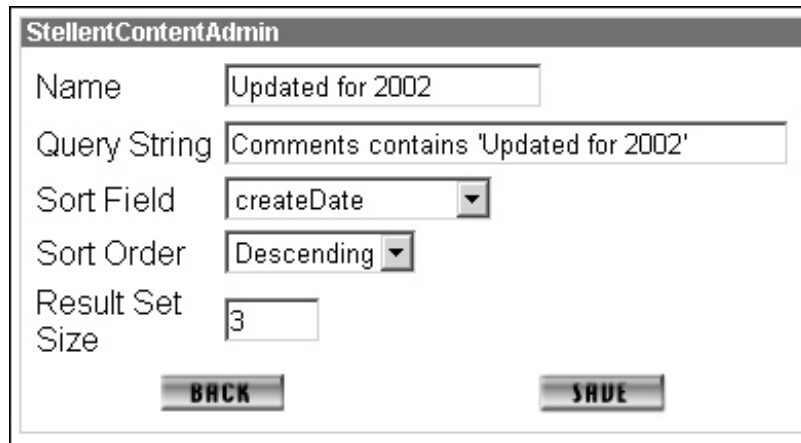


Figure 5-20 The StellentContentAdmin portlet—defined query.



Note: To have results returned you must define a query that references content actually checked in to your content server instance.

6. Click **SAVE** when edits are complete.
7. Enable the **Activate Search** options for the defined queries (see figure 5-21).



Figure 5-21 The StellentContentAdmin portlet—*Activate Search* options enabled.

8. Click **LOGOUT**.

EXPLORE THE USER PORTLETS

Configure User Portlets

Follow these steps to log in as a new user and configure the Stellent user portlets:

1. On the *Portal Login* screen, click **Sign up now**.
The *New User Registration* screen is displayed.
2. Enter a User ID and Password.
For example:
User ID: user1
Password: user1
3. Click **Submit**.
The sample portal default page is displayed.
4. Click **CUSTOMIZE MY PORTAL**.
5. For the *home* page click **Portlets**.
The *Select and Order Portlets* screen is displayed.
6. Select each of the Stellent user portlets from the *Available Portlets* list and click the arrows to move each portlet to the desired column of the *Visible Portlets* list.



Note: Do not include the StellentContentAdmin portlet. This is an administration portlet.

7. Click **SAVE**.
8. Click **RETURN TO PORTAL**.
9. Click the **HOME** tab to view the displayed Stellent portlets.

StellentContent Portlet

1. Locate the StellentContent portlet.
The StellentContent portlet displays the searches that the administrator defined using the StellentContentAdmin portlet (see figure 5-22).



Figure 5-22 The StellentContent portlet.

2. Click the **Content Information** icon.

The Content Information page is displayed in a new window (see figure 5-23).



Note: The actual data of the Content Information page will vary depending on the metadata defined when the content item was checked in to the content server.



Figure 5-23 Content Information data.

3. Close the Content Information window.

StellentSearch Portlet

1. Locate the StellentSearch portlet (see figure 5-24).

The StellentSearch portlet enables users to find business content using metadata or full text searches.



Figure 5-24 The StellentSearch portlet.

2. Click the StellentSearch **Edit** icon.

The user personalization functionality allows user to modify the displayed results from a search (see figure 5-25):

- ❖ **Quantity of search results to display** - Enter the number of results to display per page.
- ❖ **Sort Field** - Select the field to sort on (e.g., title, author, status, etc.)
- ❖ **Sort Order** - Options are *Ascending* or *Descending*.
- ❖ **Fields Displayed** - Select the field to display on the search results page (e.g., author, comments, version, etc.). Multiple fields can be selected.

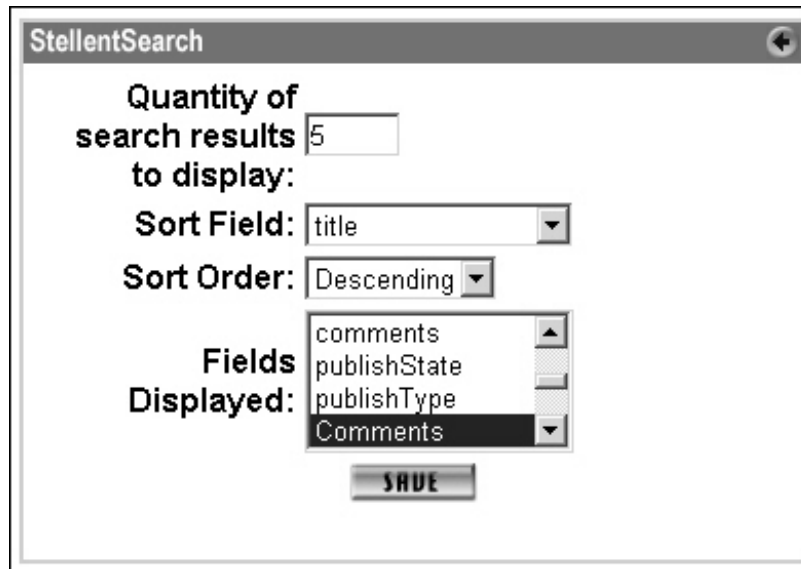


Figure 5-25 Stellent Search portlet—search results personalization page.

3. Modify the settings as desired (the example adds the Comments field)
4. Click **SAVE** when edits are complete.
5. Click the **Finish** icon to return to the sample portal page.
6. Test the StellentSearch portlet by entering a keyword and clicking **Search**.

There must be content checked into your content server that contains the specified keyword for items to be retrieved (see figure 5-26).

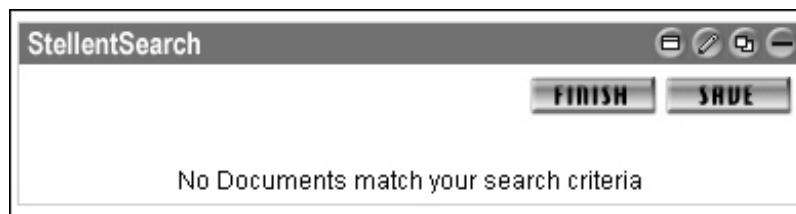


Figure 5-26 Stellent Search portlet—search results no content.

This example searched on the keyword *sample* and returned a content item matching that keyword. (see figure 5-27).

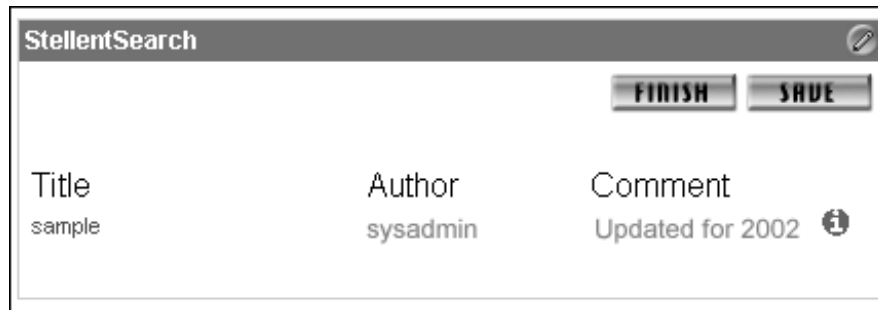


Figure 5-27 Stellent Search Portlet—search results with content.

7. On the search results screen, click **SAVE**.

The save search query screen is displayed (see figure 5-28). This functionality saves a search to the personal saved searches list of the StellentPersonalSearch portlet.

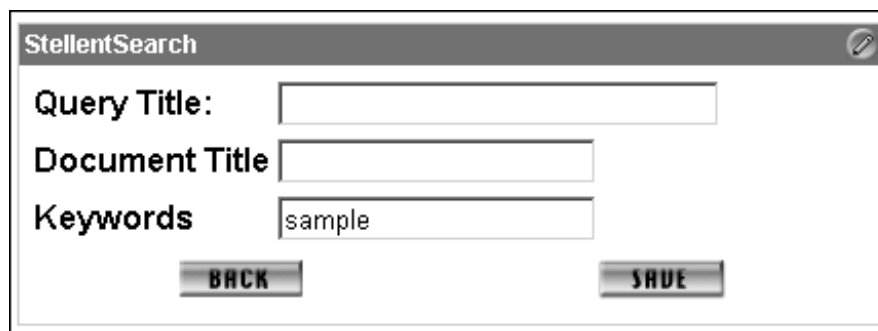


Figure 5-28 Stellent Search portlet—saving a search.

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 **SAVE**.

8. Click **BACK** to return to the search results page.
9. Click **FINISH** to perform a new search.

StellentPersonalSearch Portlet

1. Locate the StellentPersonalSearch portlet (see figure 5-29).

The StellentPersonalSearch portlet enables users to create business content searches based on user defined queries.



Figure 5-29 The StellentPersonalSearch portlet.



Note: Personal searches can be saved to the personal searches list by performing a search using the StellentSearch portlet and saving that search or by directly defining search parameters on the StellentPersonalSearch portlet.

2. Click **CREATE**.

The StellentPersonalSearch portlet search criteria page is displayed.

3. Define the search criteria (see figure 5-30).

These metadata fields can be used to define a search for business content:

- ❖ **Search Name** - Define a search name to be displayed.
- ❖ **Document Name** - (optional) Enter the content item name to search on.
- ❖ **Title** - (optional) Enter the content item title to search on.
- ❖ **Author** - (optional) Enter the author to search on.
- ❖ **Effective Date** - (optional) Enter the effective date range to search on.
- ❖ **Expiration Date** - (optional) Enter the expiration date range to search on.
- ❖ **Sort Field** - Select the field to sort on (e.g., title, author, status, etc.)
- ❖ **Sort Order** - Options are *Ascending* or *Descending*.
- ❖ **Result Set Size** - The number of search results displayed.

StellentPersonalSearch

Search Name

Document Name

Title

Author

Effective Date to

Expiration Date to

Sort Field

Sort Order

Result Set Size

BACK **SAVE**

Figure 5-30 The StellentPersonalSearch portlet—search criteria.

4. Click **SAVE**.

These icons are displayed (see figure 5-31):

Properties - Displays the defined settings for the personal search. These settings can be modified.

Delete - Removes the personal search.

StellentPersonalSearch

Test Search  

CREATE

Figure 5-31 The StellentPersonalSearch portlet—saved search.

5. Click the search name (personal saved search link).

The saved search results are displayed (see figure 5-32):

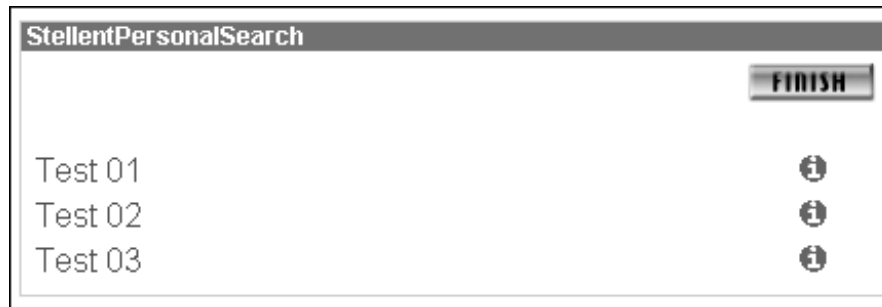


Figure 5-32 The StellentPersonalSearch portlet—saved search results.

6. Click **FINISH**.

StellentContribution Portlet

1. Locate the StellentContribution portlet (see figure 5-33).

The StellentContribution 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.

The screenshot shows a web form titled "StellentContribution". It contains the following elements:

- Content ID:** A text input field.
- Type:** A dropdown menu with "Acme Accounting Department" selected.
- Title:** A text input field.
- Group:** A dropdown menu with "Public" selected.
- Account:** A dropdown menu.
- File:** A text input field followed by a "Browse..." button.
- Comments:** A large text area with vertical scrollbars.
- Buttons:** "Check In" and "Reset" buttons at the bottom.

Figure 5-33 The StellentContribution portlet.

2. Enter any required metadata and any desired optional metadata.
3. In the File field, enter the complete path or click **Browse** to select the business content for check in.

This example checks in content that has been defined as part of a workflow. (see figure 5-34).

The screenshot shows a web form titled "StellentContribution". It contains several input fields and buttons:

- Content ID:** A text input field containing "workflowInbox".
- Type:** A dropdown menu with "Acme Sales Department" selected.
- Title:** A text input field containing "Workflow Test".
- Group:** A dropdown menu with "Public" selected.
- Account:** A dropdown menu with an empty selection.
- File:** A text input field containing "C:\workflowInbox.txt" and a "Browse..." button.
- Comments:** A text area containing "Updated for 2002".
- Buttons:** "Check In" and "Reset" buttons at the bottom.

Figure 5-34 The StellentContribution portlet—content submission.

4. Click **Check In** to submit the business content (see figure 5-35).

The screenshot shows a confirmation message in a box titled "StellentContribution". The message reads:

Successfully Checked In **workflowInbox**
File: workflowInbox.txt
Title: Workflow Test
Checked In By: user1

At the bottom of the message is a "BACK" button.

Figure 5-35 The StellentContribution portlet—content submission confirmation.

StellentWorkflowInbox Portlet

1. Locate the StellentWorkflowInbox portlet (see figure 5-36).

The StellentWorkflowInbox portlet provides users direct access to their workflow inboxes for the review and approval of business content.



Figure 5-36 The StellentWorkflowInbox portlet—no workflow items.



Note: A workflow must be defined for this portlet to provide functionality. Refer to the Stellent Content Server online help for instructions on defining a workflow.

This example assumes a criteria workflow with these properties:

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

This example assumes a workflow step with these properties:

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

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 StellentWorkflowInbox portlet provides this functionality (see figure 5-37):

- ❖ **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.



Figure 5-37 The StellentWorkflowInbox portlet— workflow item listed.

4. Click the *Workflow Info* step name to view the workflow step information (see figure 5-38).

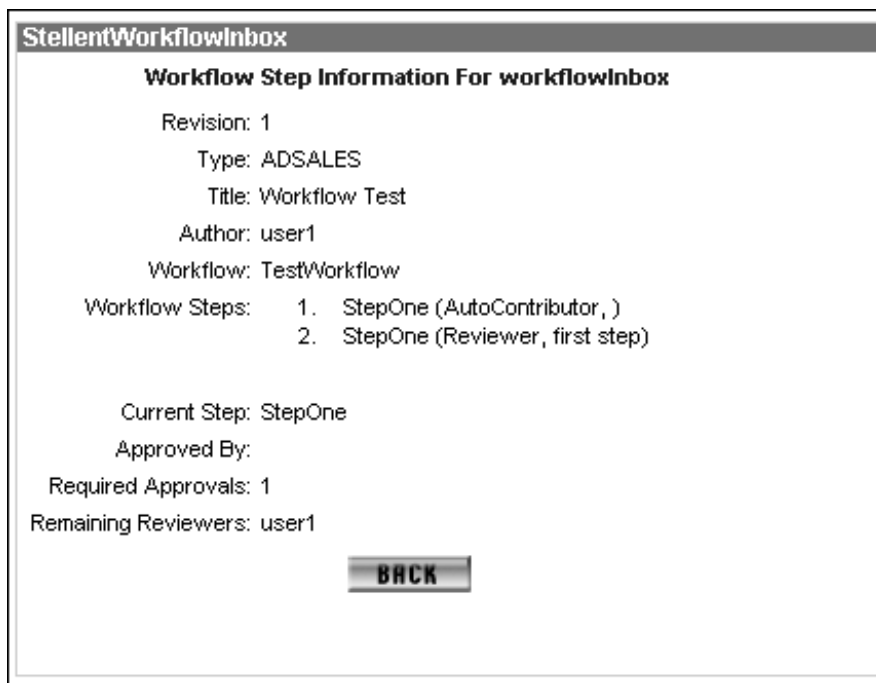


Figure 5-38 The StellentWorkflowInbox portlet— step information.

5. Click **BACK**.
6. Click **Approve** or **Reject**.

UNINSTALL PROCEDURE

OVERVIEW

This chapter provides information required for the removal of Stellent portlets from WebLogic Portal Server.

This section covers the following topics:

- ❖ [Uninstalling a Previous Version](#) (page 6-1)
- ❖ [Uninstall Steps](#) (page 6-2)

UNINSTALLING A PREVIOUS VERSION

To uninstall a previous installation that used the Stellent Service Provider Interface component (SPI component) version 2.5.0 follow the regular uninstall steps and the additional steps labeled as *SPI 2.5 Only*.

The installation of the previous version of the SPI component required the deployment of the Stellent Content Server Enterprise JavaBean (EJB) on WebLogic Server. The current version of the SPI component does not require an EJB deployment.

UNINSTALL STEPS

This section provides the steps for uninstalling an installation that included the Stellent Service Provider Interface component (SPI component) version 6.0.

Follow the additional steps labeled as *SPI 2.5 Only* to uninstall a previous installation that included the Stellent SPI component version 2.5.0.

Uninstalling consists of these steps:

- ❖ [Remove the Portlets](#) (page 6-2)
- ❖ [Remove Associated Files](#) (page 6-3)
- ❖ [Edit Configuration Files](#) (page 6-4)
- ❖ [SPI 2.5 Only—Remove the EJB](#) (page 6-6)
- ❖ [SPI 2.5 Only—Edit the set-environment File](#) (page 6-7)



Important: When done, restart WebLogic Server and WebLogic Portal Server.

Remove the Portlets

Follow these steps to remove the previously installed Stellent Portlets.

1. Start WebLogic Server and WebLogic Portal Server.
2. Launch the BEA E-Business Control Center.
3. On the E-Business Control Center, select the **Presentation** tab and click the **Portlets** icon.
4. Select each of the installed Stellent Portlets and click the **Delete** icon.
5. Select **Tools—Synchronize** from the main menu.

This deploys the portal configuration changes to the server by synchronizing with the WebLogic Portal Server webapp.

6. When the synchronization is finished, click **Close**.
7. Save the file by selecting **File—Save** from the main menu.
8. Close the file by selecting **File—Close** from the main menu.
9. Exit the E-Business Control Center by selecting **File—Exit** from the main menu.

Remove Associated Files

Follow these steps to replace or remove Stellent files:

1. Replace the *document.jar* file in the application directory with an unmodified version from the */lib/* folder or other application directory. The Stellent version of *document.jar* previously installed in that directory can be overwritten or deleted.

For example WebLogic 6 (replace file):

```
C:/bea/wlportal4.0/applications/portal/document.jar
```

For example WebLogic 7 (replace file):

```
C:/bea/weblogic700/samples/portal/sampleportalDomain/beaApps/sampleportal/
document.jar
```



Tech Tip: If you are unsure which directory contains an unmodified version, perform a file search for *document.jar* and order the results by date modified.

2. Remove the *idc_beasys.properties* file and the *idc_mimetypes.properties* file from the WebLogic Portal Server home directory.

For example, on WebLogic 6 (delete files):

```
C:/bea/wlportal4.0/idc_beasys.properties
C:/bea/wlportal4.0/idc_mimetypes.properties
```

For example, on WebLogic 7 (delete files):

```
C:/bea/weblogic700/samples/portal/sampleportalDomain/idc_beasys.properties
C:/bea/weblogic700/samples/portal/sampleportalDomain/idc_mimetypes.properties
```

3. Remove the Stellent directory and associated subdirectories from the WebLogic Portal Server stockportal *portlets* subdirectory

For example, on WebLogic 6 (delete directory):

```
C:/bea/wlportal4.0/applications/portal/stockportal/portlets/Stellent/
```

For example, on WebLogic 7 (delete directory):

```
C:/bea/weblogic700/samples/portal/sampleportalDomain/beaApps/sampleportal/s
ampleportal/portlets/Stellent/
```

4. Delete the Stellent JAR file from the WebLogic Portal Server stockportal *lib* subdirectory.

For example, on WebLogic 6 (delete file):

```
C:/bea/wlportal4.0/applications/portal/stockportal/WEB-INF/lib/stellent.jar
```

For example, on WebLogic 7 (delete both files):

```
C:/bea/weblogic700/samples/portal/sampleportalDomain/beaApps/sampleportal/sampleportal/WEB-INF/lib/IdcServerBean.jar
```

```
C:/bea/weblogic700/samples/portal/sampleportalDomain/beaApps/sampleportal/sampleportal/WEB-INF/lib/IdcServerBeanTaglibs.jar
```

Edit Configuration Files

Follow these steps to edit or delete Stellent references in the configuration files:

1. Open the WebLogic Portal Server *application-config.xml* file for your application in a text-only editor.

For example, on WebLogic 6:

```
C:/bea/wlportal4.0/applications/portal/META_INF/application-config.xml
```

For example, on WebLogic 7:

```
C:/bea/weblogic700/applications/porta/META_INF/application-config.xml
```

2. Edit the URL and Properties for the default *DocumentConnectionPool* entry in the *application-config.xml* file (see figure 6-1).

For example (replace these entries):

```
URL=" jdbc:beasys:docgmt:com.idc.beasys.IdcDocumentProvider "  
Properties="idc.beasys.properties=idc_beasys.properties"
```



Tech Tip: Reference an unmodified version of this file for the appropriate URL and Properties entries. If you are unsure which directory contains an unmodified version, perform a file search for *application-config.xml* and order the results by date modified.


```

<DocumentConnectionPool
  Name="default "
  DriverName="com.bea.pl3n.content.document.jdbc.Driver"
  URL="jdbc:beasys:docmgmt:com.bea.pl3n.content.document
.ref.RefDocumentProvider "
  Properties="jdbc.dataSource=weblogic.jdbc.pool.commerc
ePool;schemaXML=C:/bea/wlportal4.0/dmsBase/doc-
schemas;docBase=C:/bea/wlportal4.0/dmsBase "
  InitialCapacity="20 "
  MaxCapacity="20 "
  CapacityIncrement="0 "
/>

```

Figure 6-1 The application-config.xml file (edited).

3. Save the *application-config.xml* file.
4. Open the WebLogic Portal Server *web.xml* file in a text-only editor.

For example, on WebLogic 6:

```
C:/bea/wlportal4.0/applications/portal/stockportal/WEB-INF/web.xml
```

For example, on WebLogic 7:

```
C:/bea/weblogic700/samples/portal/sampleportalDomainbeaApps/sampleportal/s
ampleportal//WEB-INF/web.xml
```

5. Remove the references to the Stellent web location (HttpWebRoot), content server connection information (IdcReference), and content server user (IdcUser) from the context parameters of the *web.xml* file.

For example (delete content-param values):

```

<context-param>
  <param-name>HttpWebRoot</param-name>
  <param-value>http://localhost/stellent/</param-value>
</context-param>
<context-param>
  <param-name>IdcReference</param-name>
  <param-value>socket:localhost:4444</param-value>
</context-param>
<context-param>

```

```
<param-name>IdcUser</param-name>  
<param-value>guest</param-value>  
</context-param>
```

6. Remove the Stellent Tag Library *taglib* reference from the *taglib* parameters of the *web.xml* file.

For example (delete *taglib* values):

```
<taglib>  
  <taglib-uri>stellent.tld</taglib-uri>  
  <taglib-location>/WEB-INF/stellent.tld</taglib-location>  
</taglib>
```

7. Remove the Stellent GetFile Servlet *servlet* and *servlet-mapping* reference from the *servlet* parameters of the *web.xml* file.

For example (delete *servlet* and *servlet-mapping* values):

```
<servlet>  
  <servlet-name>getfile</servlet-name>  
  <servlet-class>idcbean.taglib.GetFileServlet</servlet-class>  
</servlet>  
<servlet-mapping>  
  <servlet-name>getfile</servlet-name>  
  <url-pattern>/getfile/*</url-pattern>  
</servlet-mapping>
```

8. Save the *web.xml* file.

SPI 2.5 Only—Remove the EJB



Note: Perform these steps to uninstall a previous installation that used the Stellent Service Provider Interface component (SPI component) version 2.5.0.

Follow these steps to remove the Stellent Content Server Enterprise JavaBean:

1. Stop WebLogic Server and WebLogic Portal Server.

2. Remove the *IdcEjb.jar* file from your WebLogic Server instance.

For example (development mode):

`C:/bea/wlserver6.1/config/mydomain/applications/IdcEjb.jar`



Note: If the EJB is deployed in production mode or if it is configured in the *config.xml* file of any of the domains in your WebLogic Server `/config/<yourdomain>` directory, you will need to remove the related entries from the *config.xml* file.

SPI 2.5 Only—Edit the set-environment File

1. Open the WebLogic Portal Server *set-environment* file in a text-only editor.

For example (on Windows):

`C:/bea/wlportal4.0/bin/win32/set-environment.bat`

For example (on UNIX):

`/usr/bea/wlportal4.0/bin/unix/set-environment.sh`

2. Remove the directory path for the *IdcEjb.jar* file and the directory path referencing the *IdcEjb* stub classes from the CLASSPATH entry (see figure 6-2).

For example (delete these entries):

`C:/bea/wlserver6.1/config/mydomain/applications/IdcEjb.jar`

`C:/bea/wlserver6.1/tmp_ejbtst187001/IdcEjb_IdcEjb/`



Important: Do not delete other directory path information.

```
REM ----- CLASSPATH -----
SET
CLASSPATH=%P13N_DIR%\lib\patches.jar;%JAVA_CLASSPATH%;
%EXT_CLASSPATH%;%DB_CLASSPATH%
```

Figure 6-2 The *set-environment.bat* file (edited).

3. Save the *set-environment* file.



Important: When done, restart WebLogic Server and WebLogic Portal Server.



USING THE REMOTE STELLENT CONTENT SERVER

OVERVIEW

For testing and demonstration purposes, Stellent provides a remote Stellent Content Server located at the Stellent headquarters. This content server instance is *testportal.stellent.com* with a port of 4444.

This section provides instructions on the steps required to [Reference the Remote Content Server](#) (page A-1)

REFERENCE THE REMOTE CONTENT SERVER

To use the Stellent Content Server located remotely at Stellent corporate headquarters the *web.xml* file and *idc_beasys.properties* file must be edited.

Referencing the remote content server consists of these steps:

- ❖ [Edit the web.xml File](#) (page A-1)
- ❖ [Edit the idc_beasys.properties File](#) (page A-2)

Edit the web.xml File

1. Open the WebLogic Portal Server *web.xml* file with a text-only editor.

For example (WebLogic 6):

C:/bea/wlportal4.0/applications/portal/stockportal/WEB-INF/web.xml

For example (WebLogic 7):

C:/bea/weblogic700/samples/portal/sampleportalDomainbeaApps/sampleportal/sampleportal/WEB-INF/web.xml

2. Modify these entries (see figure A-1):

HttpWebRoot: http://testportal.stellent.com/
IdcReference: socket:testportal.stellent.com:4444
IdcUser: *See note below.*



Note: Obtain a Stellent Content Server IdcUser name from Stellent Technical Support. See [If You Need Assistance](#) (page 1-4) for additional information.

```
<!-- Stellent Parameters -->
<context-param>
  <param-name>HttpWebRoot</param-name>
  <param-value>http://testportal.stellent.com/
</param-value>
</context-param>
<context-param>
  <param-name>IdcReference</param-name>
  <param-value>socket:testportal.stellent.com:4444
</param-value>
</context-param>
<context-param>
  <param-name>IdcUser</param-name>
  <param-value>guest</param-value>
</context-param>
```

Figure A-1 The web.xml file *idcbean* parameters.

Edit the `idc_beasys.properties` File

Follow these steps to edit the file:

1. Open the `idc_beasys.properties` file in a text-only editor.

For example (WebLogic 6):

C:/bea/wlportal4.0/idc_beasys.properties

For example (WebLogic 7):

C:/bea/weblogic700//samples/portal/sampleportalDomain/

2. Modify these entries (see figure A-2):



Note: See [Edit the Associated Files](#) (page 3-6) for additional information on these entries.

xcs.url:	testportal.stellent.com:4444
xcs.host:	testportal.stellent.com
xcs.mode	Set to STREAM
xcs.user:	<i>See note below.</i>
xcs.password:	<i>See note below.</i>



Note: Obtain a Stellent Content Server User ID and Stellent Content Server password from Stellent Technical Support. See [If You Need Assistance](#) (page 1-4) for additional information.

```
xcs.url=socket:testportal.stellent.com:4444
xcs.host=testportal.stellent.com
xcs.modw=Stream
xcs.user=
xcs.password=
```

Figure A-2 The idc_beasys.properties file.



Important: When done, restart WebLogic Server and WebLogic Portal Server.

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