

STELLENT™

Content Server

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

JSP-EN5-610

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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 1-2)
- ❖ [Stellent Product Distinctions](#) (page 1-3)
- ❖ [If You Need Assistance](#) (page 1-4)

ABOUT THIS GUIDE

This guide discusses the steps required to deploy and configure Stellent Portlets for WebSphere Portal Server.

Audience

This guide is intended for application developers and integrators who need to access Stellent Content Server functions from a Java Server Page on IBM WebSphere® Portal Server v.4.1.








Important: This guide describes the integration of Stellent Portlets/Tag Libraries with WebSphere Portal Server v.4.1. For information on the integration of Stellent Portlets using the Stellent ContentServerBean Enterprise JavaBean (EJB) with WebSphere Portal Server v.1.2 refer to *Deploying Stellent Portlets/EJB on WebSphere Portal Server 1.2*.

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.

Symbol	Description
	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 section provides basic conceptual information about the integration architecture and descriptions of the available Stellent portlets.

This section covers the following topics:

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

INTEGRATION ARCHITECTURE

WebSphere Portal Server users access Stellent Content Server through the Stellent Portlets interface. This architecture enables calls to the content server from Stellent Portlets by interfacing with the integrated Stellent IdcServerBean JavaBean via the Stellent JSP Tag Libraries. (see figure 2-1). This interface enables users and developers to retrieve Stellent content based upon full text or metadata searches. In addition, the provided Stellent GetFileServlet class is used to establish a connection to a Stellent Content Server instance for the downloading of content items through the portal interface.

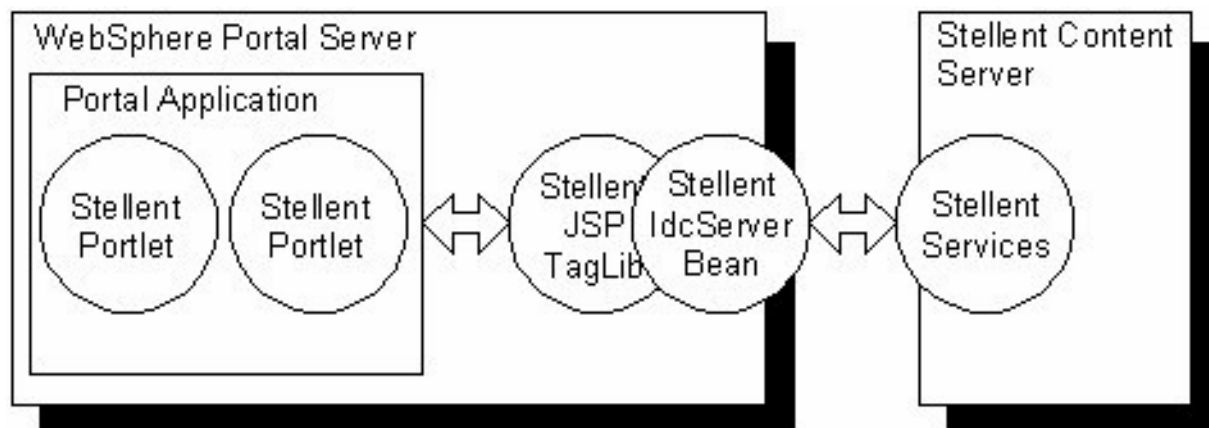


Figure 2-1 WebSphere Portal Server and Stellent Content Server integration.

STELLENT PORTLETS FOR WEBSHERE PORTAL SERVER

These Stellent Portlets are available for WebSphere Portal Server:

- ❖ [Stellent Content Portlet](#) (page 2-2)
- ❖ [Stellent Search Portlet](#) (page 2-3)
- ❖ [Stellent Saved Searches Portlet](#) (page 2-4)
- ❖ [Stellent Contribution Portlet](#) (page 2-6)
- ❖ [Stellent WorkflowInbox Portlet](#) (page 2-7)

Stellent Content Portlet

The Stellent Content portlet (see figure 2-2) enables WebSphere 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 information and metadata on the content items displayed in the list. The content displayed to the user is defined by the administrator on the associated Java Server Page.



Figure 2-2 The Stellent Content portlet.

Stellent Search Portlet

The Stellent Search portlet (see figure 2-3) enables WebSphere 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 2-4). 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.



Figure 2-3 The Stellent Search portlet.

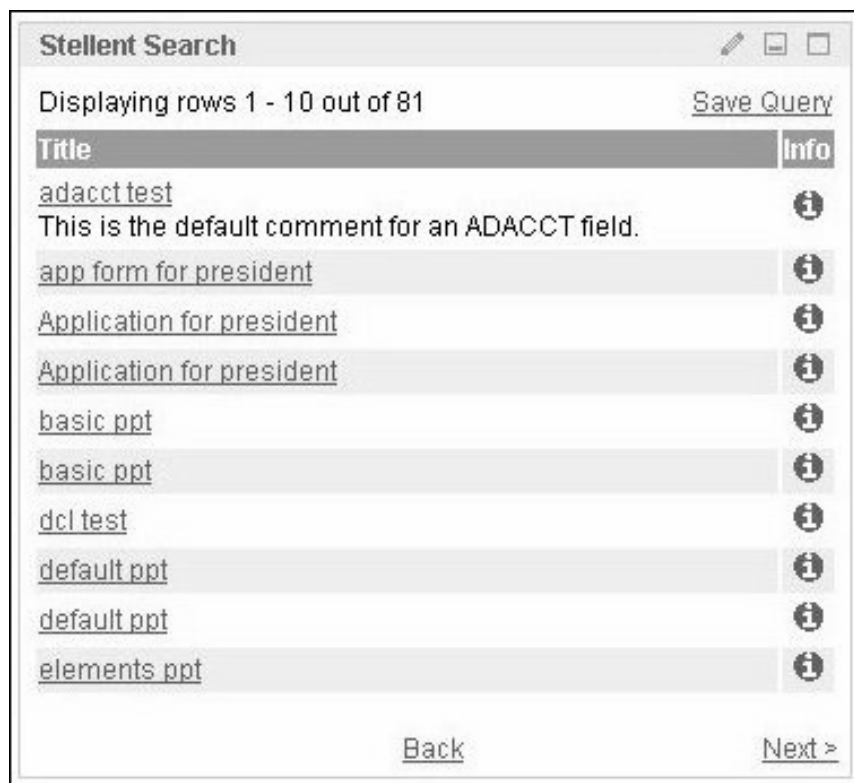


Figure 2-4 Stellent Search Portlet—search results with content.

Stellent Saved Searches Portlet

The Stellent Saved Searches portlet (see figure 2-5) enables WebSphere 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 2-6). Personal 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 Searches portlet.



Figure 2-5 The Stellent Saved Searches portlet—searches defined.

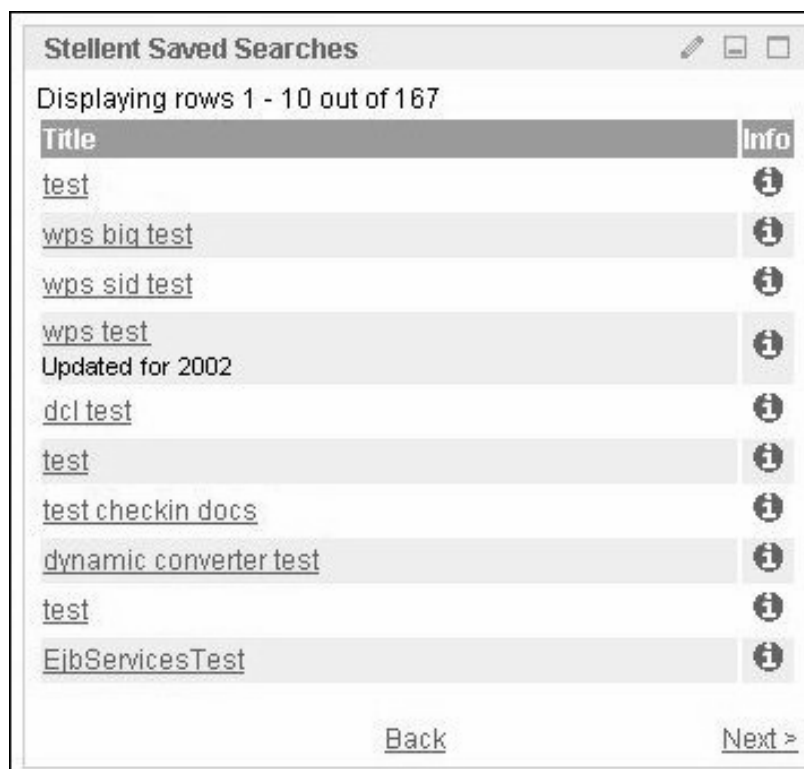
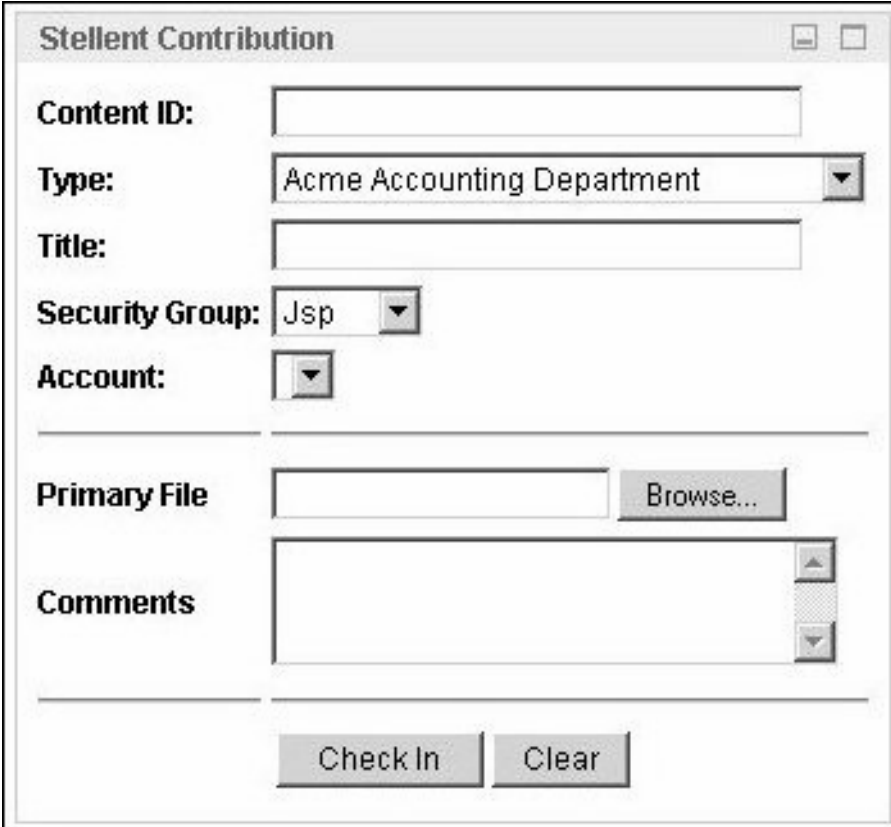


Figure 2-6 The Stellent Saved Searches portlet—saved search results.

Stellent Contribution Portlet

The Stellent Contribution portlet (see figure 2-7) enables WebSphere 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.



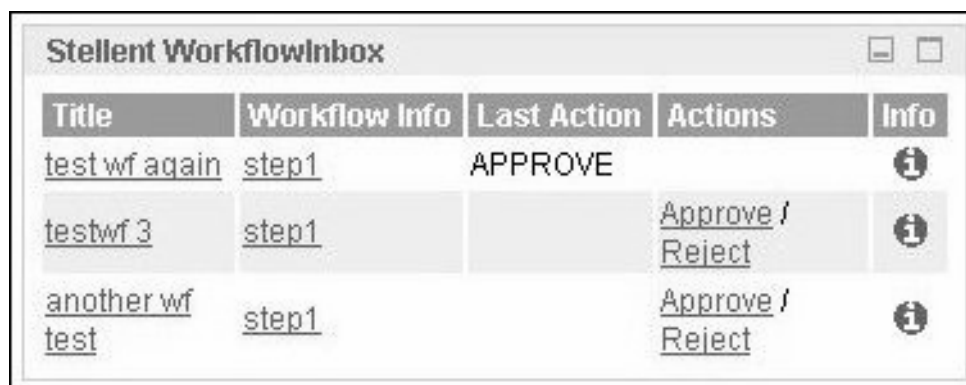
The screenshot shows a web form titled "Stellent Contribution" with a standard window border. The form contains several input fields and buttons:

- Content ID:** A text input field.
- Type:** A dropdown menu with "Acme Accounting Department" selected.
- Title:** A text input field.
- Security Group:** A dropdown menu with "Jsp" selected.
- Account:** A dropdown menu.
- Primary File:** A text input field followed by a "Browse..." button.
- Comments:** A large text area with up and down arrow buttons on the right side.
- Buttons:** At the bottom, there are two buttons: "Check In" and "Clear".

Figure 2-7 The Stellent Contribution portlet—content submission form.

Stellent WorkflowInbox Portlet

The Stellent WorkflowInbox portlet (see figure 2-8) enables WebSphere 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 (see figure 2-9), the last action performed, the actions allowed, and content item information.



The screenshot shows a portlet titled "Stellent WorkflowInbox" with a table of workflow items. The table has five columns: Title, Workflow Info, Last Action, Actions, and Info. There are three rows of data. The first row shows "test wf again" with workflow step "step1" and last action "APPROVE". The second row shows "testwf 3" with workflow step "step1" and allowed actions "Approve / Reject". The third row shows "another wf test" with workflow step "step1" and allowed actions "Approve / Reject". Each row has an information icon in the Info column.

Title	Workflow Info	Last Action	Actions	Info
test wf again	step1	APPROVE		
testwf 3	step1		Approve / Reject	
another wf test	step1		Approve / Reject	

Figure 2-8 The Stellent WorkflowInbox portlet—workflow items listed.

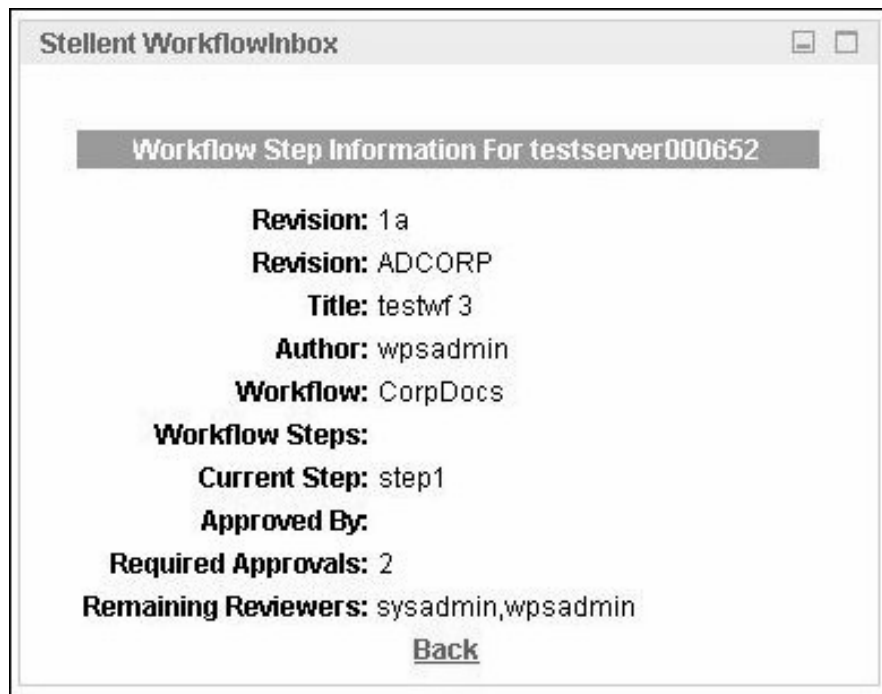


Figure 2-9 The Stellent WorkflowInbox portlet—workflow step information.

INSTALLATION AND CONFIGURATION

OVERVIEW

This section provides information required for the installation of Stellent portlets on WebSphere Portal Server.

This section covers the following topics:

- ❖ [Installation Prerequisites](#) (page 3-1)
- ❖ [Portlet Installation and Configuration](#) (page 3-3)
- ❖ [Uninstall Procedure](#) (page 3-13)

INSTALLATION PREREQUISITES

Ensure that you have the following servers and software packages installed before beginning the installation and configurations of Stellent Portlets on WebSphere Portal Server:

Parameter	Description
Content Management System	Stellent Content Server 6.1 Refer to the <i>Stellent Content Server Installation Guide</i> .

Parameter	Description
Deployment Servers	These servers are required: <ul style="list-style-type: none"> ❖ IBM WebSphere® Application Server ❖ IBM WebSphere® Portal Server v.4.1
HTTP Server	IBM HTTP Server v.1.3.12 (or other supported HTTP server). The IBM HTTP Server can be installed during the WebSphere Application Server installation.
LDAP Directory (For a full LDAP installation)	SecureWay Directory v.3.1.1.5 (or other LDAP directory supported by WebSphere Portal Server).
Relational Database	IBM DB2 Universal Database v.7.1 with fixpack 2a.



Important: This guide describes the integration of Stellent Portlets/Tag Libraries with WebSphere Portal Server v.4.1. For information on the integration of Stellent Portlets using the Stellent ContentServerBean Enterprise JavaBean (EJB) with WebSphere Portal Server v.1.2 refer to *Deploying Stellent Portlets/EJB on WebSphere Portal Server 1.2*.

In addition to Stellent Content Server 6.1, you must have all of the software and servers required for a WebSphere Portal Server instance. If this is a new installation, install and configure the software and servers in the order shown below:

1. IBM DB2 Universal Database v.7.1 with fixpack 2a.
2. IBM HTTP Server v.1.3.12 (or other HTTP Server supported by WebSphere Portal Server).
3. SecureWay Directory v.3.1.1.5 (or other LDAP directory supported by WebSphere Portal Server).



Important: For a full LDAP installation, you must install the *LDAP Provider Component* located in the \extras directory of the Stellent Content Server CD. Contact your Stellent Account Executive for information on using Stellent Consulting Services.

4. IBM WebSphere Application Server

- ❖ WebSphere Application Server must be installed and configured for use with WebSphere Portal Server. If you are already running a version of WebSphere Application Server that supports WebSphere Portal Server, you do not need to reinstall WebSphere Application Server.
 - ❖ Install the WebSphere Application Server e-fixes and log.jar.
 - ❖ Add the fully-qualified host name to the virtual host, configure the Web path for your portal, and (if applicable) configure for an existing LDAP directory.
5. IBM WebSphere Portal Server v.4.1

PORTLET INSTALLATION AND CONFIGURATION

These are the steps required for the installation and configuration of Stellent portlets:

- ❖ [Install the Portlets](#) (page 3-3)
- ❖ [Configure the Portlets](#) (page 3-5)
- ❖ [Display the Portlets](#) (page 3-7)
- ❖ [Configure Security](#) (page 3-10)

Install the Portlets

Follow these steps to install the Stellent portlets:

1. Unpackage the Stellent_IBM_Portlets_61.zip file and save to a location on your local server.



Note: This file contains the StellentContent, StellentContribution, StellentSavedSearches, StellentSearch, and StellentWorkflowInbox WAR files.

For example:

C:/StellentPortlets/

2. Start "IBM WS Admin Server 4.0" using the services control panel.
3. With a web browser, navigate to the default portal page.

For example:

http://testserver17/wps/portal

4. Click the WebSphere portal page log in icon (located in the upper right corner).
5. Log in as a valid WebSphere Portal Server administrator.

For example:

User ID: wpsadmin

Password: wpsadmin

6. Click **Log in**.
7. From the drop-down list, select **Portal Administration**.
8. Select the **Portlet** tab and then the **Install Portlets** sub-tab (see figure 3-1).



Figure 3-1 Portlets and Install Portlets tabs.

9. Click **Browse** and navigate to the directory where the WAR files were unpackaged (see figure 3-2).

For example:

C:\Stellent_IBM_Portlets\StellentSearch.war



Note: The contents of the Stellent_IBM_Portlets_61.zip file should have been previously unpackaged and saved to a location on your local server.



Tech Tip: If installing a new version of a portlet or an edited portlet, you must first uninstall any previous version of that portlet. See [Uninstall Procedure](#) (page 3-13) for additional information.



Figure 3-2 Install portlets.

10. Click **Next**.

A confirmation message is displayed.

11. Click **Install**. It may take several minutes for WebSphere Portal Server to load the WAR file.
12. Repeat the portlet installation steps for each of the remaining Stellent WAR files.

For example:

C:\Stellent_IBM_Portlets\StellentContent.war
 C:\Stellent_IBM_Portlets\StellentContribution.war
 C:\Stellent_IBM_Portlets\StellentSavedSearches.war
 C:\Stellent_IBM_Portlets\StellentWorkflowInbox.war

Configure the Portlets

Follow these steps to configure the Stellent portlets:

1. From the drop-down list, select **Portal Administration**.
2. Select the **Portlet** tab and then the **Manage Portlets** sub-tab (see figure 3-3).



Figure 3-3 Portlets and Manage Portlets tabs.

3. Select the **Stellent Content Portlet** entry in the list box and click **Modify Parameters**. (see figure 3-4).

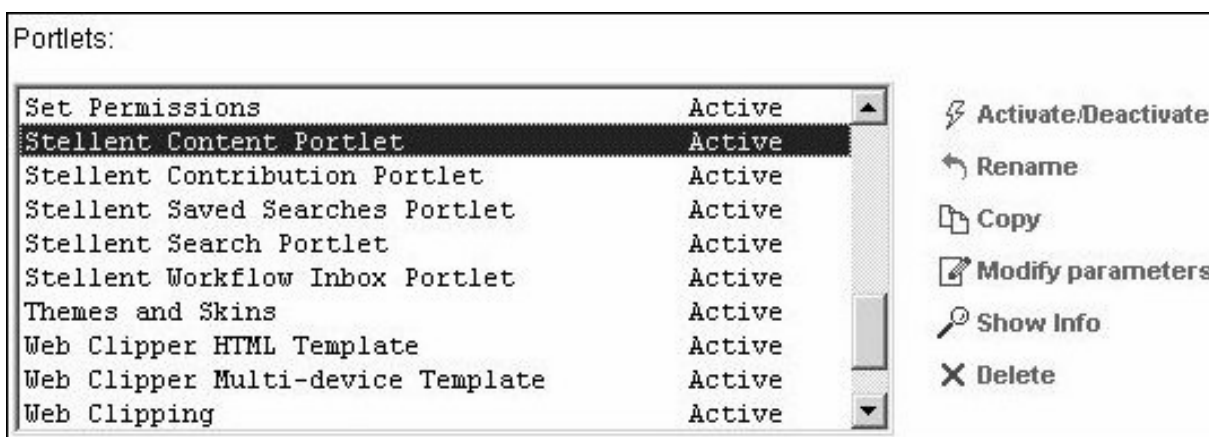


Figure 3-4 Stellent Content Portlet entry.

4. Edit the values to define the complete web location (HttpWebRoot) and the content server connection information (IdcReference) so that they reference your content server instance (see figure 3-5).

For example:

HttpWebRoot: http://localhost/stellent/

IdcReference: socket:localhost:4444



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



Note: Refer to the Javadoc for the IdcServerBean for additional information on these parameters (accessible on the Stellent Content Server CDROM).

Portlets Portal Settings | Users and Groups | Security | Portal Content

Install Portlets Manage Portlet Applications **Manage Portlets** Web Clipping

Configure parameters and titles

Save | Close

Portlet Name: Stellent Content Portlet

Edit Parameters:

Parameter	Value	
<input type="checkbox"/> IdcReference	socket:localhost:4444	Delete
<input type="checkbox"/> ActionMapFile	com.stellent.portlet.resources.St	
<input type="checkbox"/> SessionMapFile	com.stellent.portlet.resources.Se	
<input type="checkbox"/> ActionSessionName	scs.content.action	
<input type="checkbox"/> IdcUser	guest	
<input type="checkbox"/> DefaultJSP	/content.jsp	
<input type="checkbox"/> HttpWebRoot	http://localhost/stellent/	
<input type="text"/>	<input type="text"/>	Add

Figure 3-5 Edit Stellent portlet parameters.

5. Click **Save**.
6. Click **Close**.
7. Repeat the steps to configure each Stellent portlet.

Display the Portlets

Follow these steps to display the Stellent portlets:

1. From the drop-down list, select **Work With Pages**.
2. Select the **Edit Layout and Content** tab.
3. From the Page Group list, select **Home**.
4. From the newly displayed Page list, select **Welcome** (see figure 3-6).



Figure 3-6 Edit Layout and content tab.

5. Click **Get Portlets** (see figure 3-7).



Figure 3-7 Get portlets.

6. Enable the **Search for Portlets** and **Name Contains** options.
7. In the Name Contains text field enter Stellent (see figure 3-8).

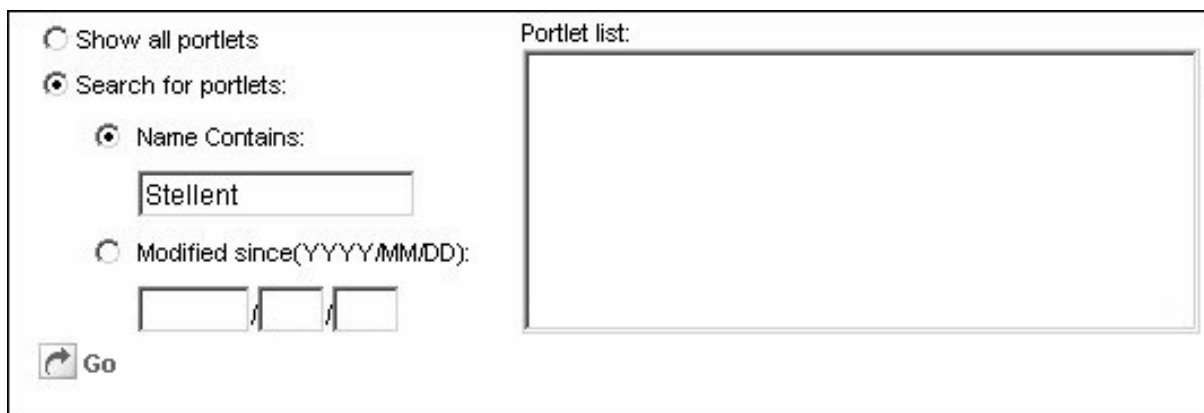


Figure 3-8 Search for Stellent portlets.

8. Click **Go**.

A list of available Stellent portlets is returned.

9. For each Stellent portlet click the **Add to portlet list** icon (see figure 3-9).

Search Results:			
	Name	Title	Description
	Stellent Content Portlet	Stellent Content	Runs predefined queries against the cont
	Stellent Contribution Portlet	Stellent Contribution	Enables contribution of files to the reposit
	Stellent Saved Searches Portlet	Stellent Saved Searches	Runs predefined queries against the cont
	Stellent Search Portlet	Stellent Search	Runs an ad hoc search against the conte
	Stellent Workflow Inbox Portlet	Stellent WorkflowInbox	Runs predefined queries against the wor
<input checked="" type="checkbox"/> OK Cancel			

Figure 3-9 List of Stellent portlets.



Note: The **Add to portlet list** icon is the “plus symbol” adjacent to each Stellent portlet listing.

10. Click **OK**.
11. Use the WebSphere controls to position the Stellent portlets for the desired page layout (see figure 3-10)

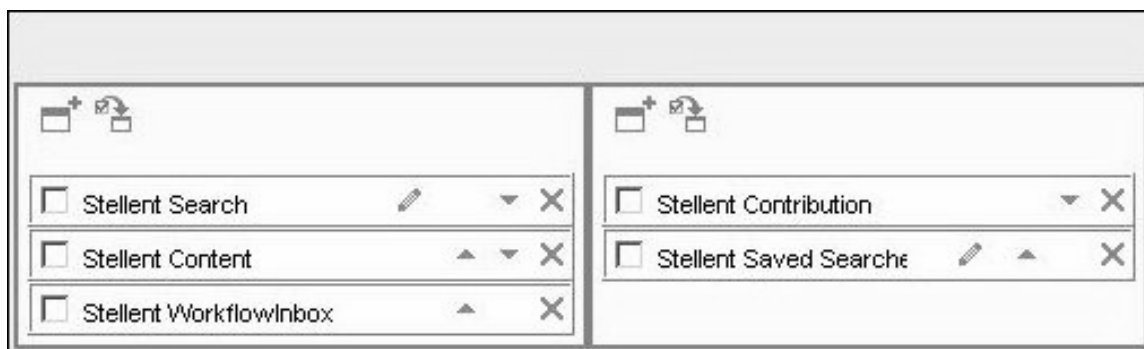


Figure 3-10 Position the Stellent portlets.

12. Click **Activate**.



Important: This page will be deactivated when you begin working on it. Please remember to activate when you are done.

Configure Security

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

1. From the drop-down list, select **Portal Administration**.
2. Select the **Security** tab and then the **Access Control List** sub-tab (see figure 3-11).



Figure 3-11 Access Control List tab.

3. Enable the Special Groups option.
4. From the drop-down list, select **All authenticated users**.
5. Enable the **Search On** and **Name Contain** options.
6. In the Name Contains text field enter "Stellent" (see figure 3-12).

☒ Special groups:

All authenticated users

Select the objects for the permissions:

portlets

☐ Show All

☒ Search On

☒ Name contains:

Stellent

☐ Modified since:

yyy mm dd

Go

Save | Reset

Figure 3-12 Defining special groups and searching on Stellent.

7. Click **Go**.
8. Using the displayed Stellent portlet list, assign permissions based on the access requirements you establish for users (see figure 3-13).

These security settings are recommend for authenticated users:

StellentContent - view
 StellentContribution - view
 StellentSavedSearches - edit
 StellentSearch - edit
 StellentWorkflowInbox - view

Name	Active				Minimum					
	View	Edit	Manage	Delegate	None	View	Edit	Manage	Delegate	
Select All					<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	
Stellent Content Portlet	✓				<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	⇒
Stellent Contribution Portlet	✓				<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	⇒
Stellent Saved Searches Portlet		✓			<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	⇒
Stellent Search Portlet		✓			<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	⇒
Stellent Workflow Inbox Portlet	✓				<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	⇒
Select All					<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	


 **All authenticated users** permissions for portlets whose name contains Stellent.

Figure 3-13 User access permission settings—authenticated users.

9. Click **Save**.
10. From the drop-down list, select **All anonymous users**.
11. Search on “Stellent” and click **Go**.
12. Using the displayed Stellent portlet list, assign permissions based on the access requirements you establish for users (see figure 3-14).

These security settings are recommend for anonymous users:

Stellent Content Portlet - view

Stellent Search Portlet - view

Name	Active				Minimum					
	View	Edit	Manage	Delegate	None	View	Edit	Manage	Delegate	
Select All					<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	
Stellent Content Portlet	✓				<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	⇒
Stellent Contribution Portlet					<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	⇒
Stellent Saved Searches Portlet					<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	⇒
Stellent Search Portlet	✓				<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	⇒
Stellent Workflow Inbox Portlet					<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	⇒
Select All					<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	


 **All anonymous users** permissions for portlets whose name contains Stellent.

Figure 3-14 User access permission settings—anonymous users.

13. Click **Save**.
14. Stop and restart WebSphere Portal Server.

UNINSTALL PROCEDURE

Follow these steps to uninstall the Stellent portlets:



Important: These steps are not part of the Stellent portlet installation and configuration procedure—this is an uninstall procedure for removing all Stellent portlets from WebSphere Portal Server.

1. Log in to WebSphere Portal Server as a valid administrator.
2. From the drop-down list, select **Portal Administration**.
3. Select the **Portlet** tab and then the **Manage Portlets** sub-tab (see figure 3-15).



Figure 3-15 The Portlets and Manage Portlets tabs.

4. Enable the **Search for portlets** option.
5. Enable the **Active/Inactive portlets** option.
6. In the Name Contains text field enter “Stellent” (see figure 3-16).

The image shows a search dialog box for portlets. It has two radio buttons at the top: 'Show all portlets' and 'Search for portlets'. The 'Search for portlets' option is selected. Below this is a text field labeled 'Name contains:' with the word 'Stellent' entered. Underneath the text field is a 'Show:' section with three radio buttons: 'Active portlets', 'Inactive portlets', and 'Active/inactive portlets'. The 'Active/inactive portlets' option is selected. At the bottom left of the dialog box is a 'Go' button with a magnifying glass icon.

Figure 3-16 Search for Stellent portlets.

7. Click **Go**.
The list of Stellent portlets is displayed.
8. Select a Stellent Portlet from the list and click **Delete** (see figure 3-17).

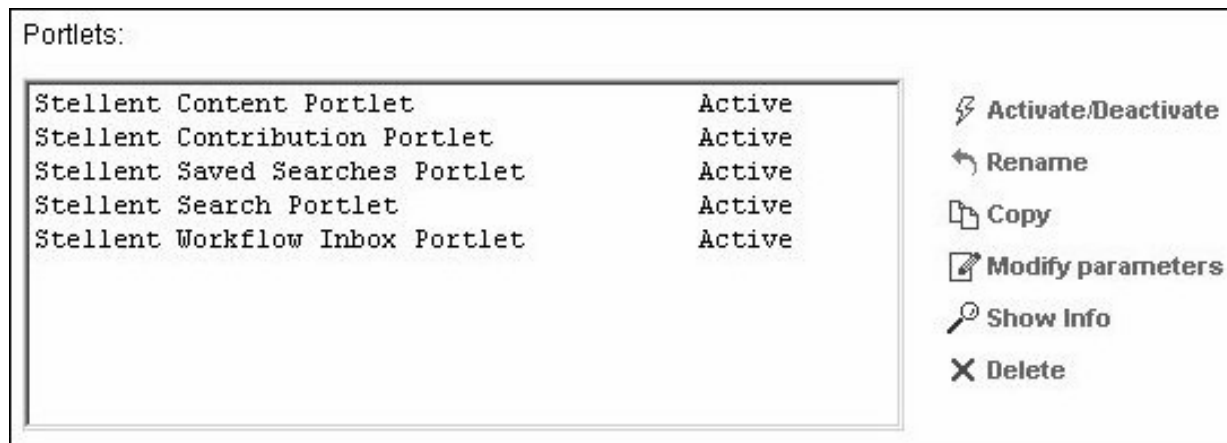


Figure 3-17 List of Stellent portlets.

9. A confirmation box is displayed, click **OK**.
10. Repeat the previous steps for each Stellent portlet.
11. Stop and restart WebSphere Portal Server.

USING THE STELLENT PORTLETS

OVERVIEW

This chapter provides information on using Stellent portlets configured on WebSphere Portal Server. It is assumed that all of the installation steps have been performed and that all of the Stellent portlets are accessible.

This section covers the following topics:

- ❖ [Access the Stellent Portlets](#) (page 4-1).
- ❖ [Explore the Stellent Portlets](#) (page 4-3).



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

ACCESS THE STELLENT PORTLETS

Follow these steps to access the Stellent portlets:



Important: It is assumed that the Stellent portlets have been installed and configured. See [Portlet Installation and Configuration](#) (page 3-3) for additional information.

1. With a web browser, navigate to the default portal page.

For example:

`http://testserver17/wps/portal`

2. Click the WebSphere portal page log in icon (located in the upper right corner).
3. Enter a User ID and Password for a valid WebSphere Portal Server administrator.

For example:

User ID: wpsadmin

Password: wpsadmin






4. Click **Log in**.


If the page design defined in the Installation and Configuration steps were followed the *Home—Welcome* page is displayed with the Stellent portlets assigned to that page.

If a different page layout was used, select the assigned WebSphere portal page that the Stellent portlets were configured on.

Portlet Controls

These icons are used by the portlets for navigation:

Icon	Name	Description
	Edit	Opens the portlet for editing.
	Minimize	Minimizes the portlet so that only the Title is displayed.
	Maximize	Maximizes the portlet to the full size of the browser window.
	Restore	Returns the portlet to its original state.
	Back	Returns the portlet to the previous page.

Icon	Name	Description
	Info	Opens the content item information page.

EXPLORE THE STELLENT PORTLETS

Follow these steps to test the Stellent portlets and become familiar with the functionality of each portlet.

Stellent Saved Searches Portlet

1. Locate the Stellent Saved Searches portlet (see figure 4-1).

The Stellent Saved Searches portlet enables users to create business content searches based on user defined queries.

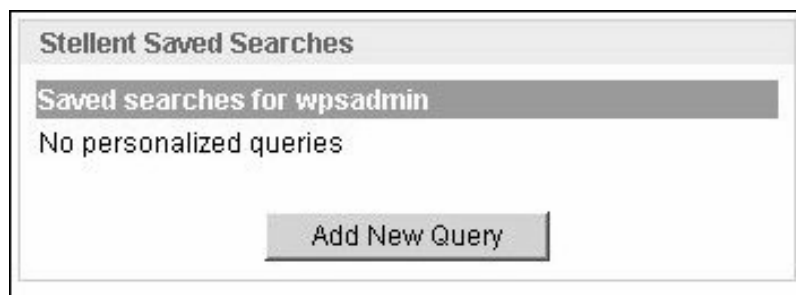


Figure 4-1 The Stellent Saved Search portlet—no content defined.



Note: 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 Searches portlet.

2. Click **Add New Query**.

The Stellent Saved Searches portlet new query page is displayed.

3. Define your search criteria (see figure 4-2).

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

- ❖ **Results Per Page** - The number of search results displayed on each page (e.g., 5, 10, 15, etc.).
- ❖ **Sort By** - The sort criteria for the search results (e.g., Date, Title, Author, etc.).
- ❖ **Sort Order** - The sort order. Options are *Ascending* or *Descending*.
- ❖ **Query Title** - The user defined name for the search (e.g., My Search, Accounting Forms, etc.).
- ❖ **Query Text** - The text used to define the search (e.g., Stellent, Forms, Employees, etc.).

The screenshot shows a web browser window titled "Stellent Saved Searches". It contains two main sections. The first section, "Standard search parameters", has a "Results Per Page" input field set to "10", a "Sort By" dropdown menu set to "Date", and a "Sort Order" dropdown menu set to "Descending". Below these are "Save" and "Done" buttons. The second section, "Saved searches for wpsadmin", has a "Query Title" input field containing "Stellent Saved Search" and a "Query Text" input field containing "Stellent". Below these are "Add New Query" and "Done" buttons.

Figure 4-2 The Stellent Saved Searches portlet—search criteria defined.

4. Click **Done**. (Optional—click **Add New Query** to add an additional query.)
5. Click the **Back** icon to view the added query (see figure 4-3).



Figure 4-3 The Stellent Saved Search portlet—with saved searches.

6. Click the search name (e.g., the Stellent Saved Search link).

The search results for that query are displayed (see figure 4-4).



Figure 4-4 The Stellent Saved Search portlet—saved search results.

7. Click the **Info** icon of any content item.

The content item information page is displayed (see figure 4-5).

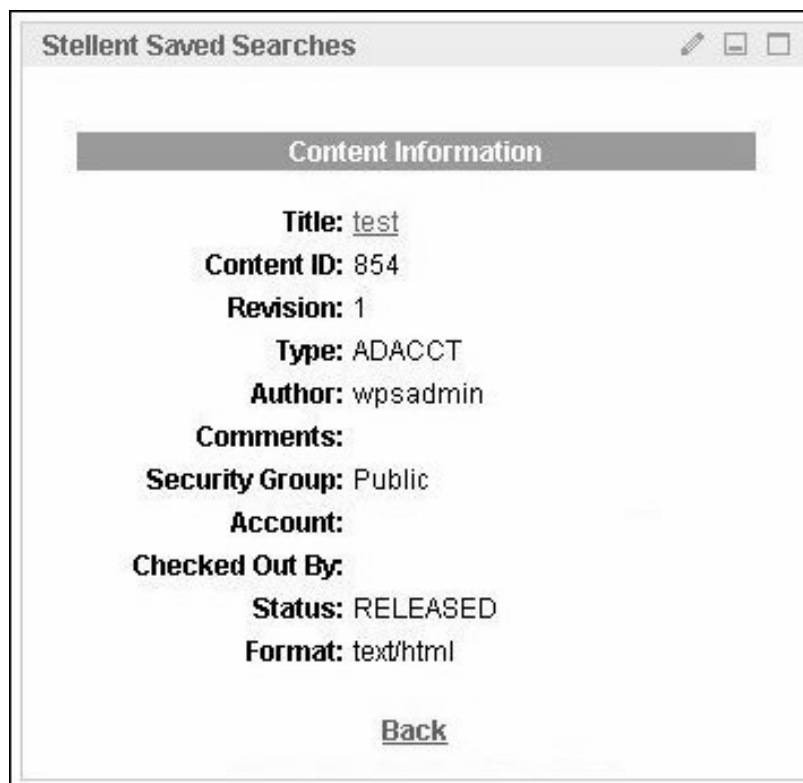


Figure 4-5 The content item information page.

8. Click **Back**.

Stellent Content Portlet

1. Locate the Stellent Content portlet (see figure 4-6).

The Stellent Content portlet displays the queries pre-defined by the WebSphere Portal Server administrator.



Note: See Customize the Stellent Content Portlet (page 5-1) for information on customizing the Stellent Content portlet.



Figure 4-6 Stellent Content portlet.

2. Click a query title (e.g., the Accounting Forms link).

The query results are displayed (see figure 4-7). The actual content will vary depending on the content items residing on the content server.

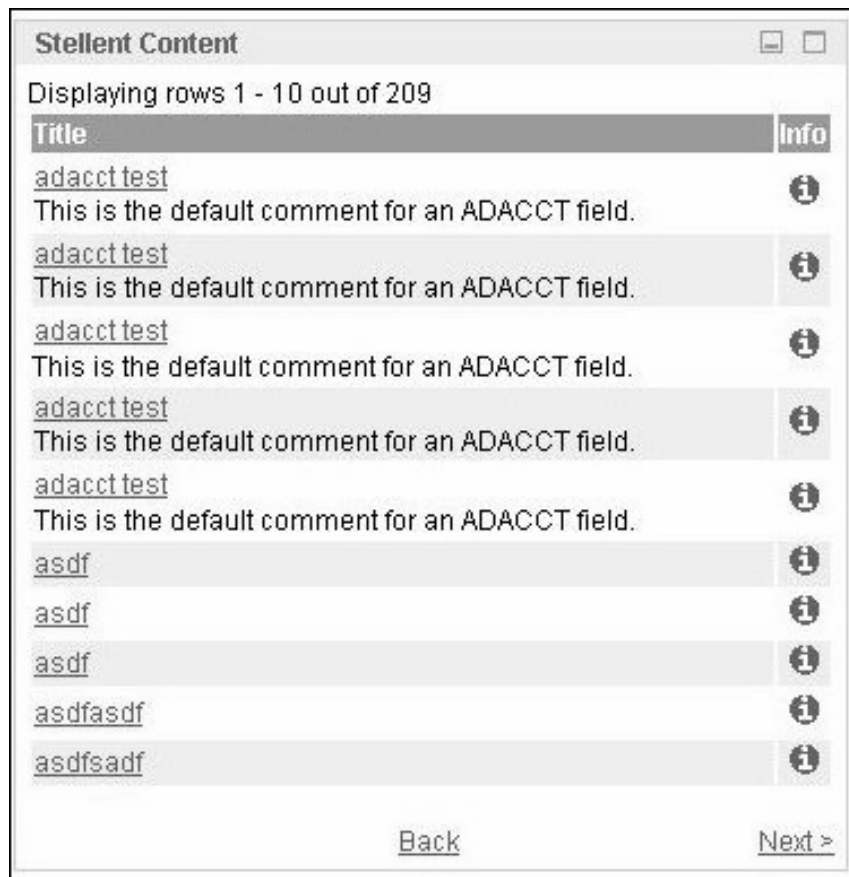


Figure 4-7 The Stellent Content portlet—query results.

3. Click **Back**.

Stellent Search Portlet

1. Locate the Stellent Search portlet (see figure 4-8).

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

The screenshot shows a web portlet titled "Stellent Search". It features two input fields: "Subject:" and "Keywords:". Below these fields is the "STELLENT™" logo in a large, bold, sans-serif font. To the right of the logo is a rectangular button labeled "Submit". The portlet has a standard window-like border with a title bar and three small icons (edit, maximize, close) in the top right corner.

Figure 4-8 The Stellent Search portlet.

2. Enter a keyword and click **Submit** to search for content items (see figure 4-9).

There must be content checked into your content server that contains the specified keyword for items to be retrieved.

This screenshot is identical to the one in Figure 4-8, but the "Keywords:" input field now contains the text "test". The "Subject:" field remains empty. The "STELLENT™" logo and the "Submit" button are still present in the same positions.

Figure 4-9 The Stellent Search portlet—with defined keyword.

The search results are displayed (see figure 4-10). The actual content will vary depending on the content items checked in to your content server instance.

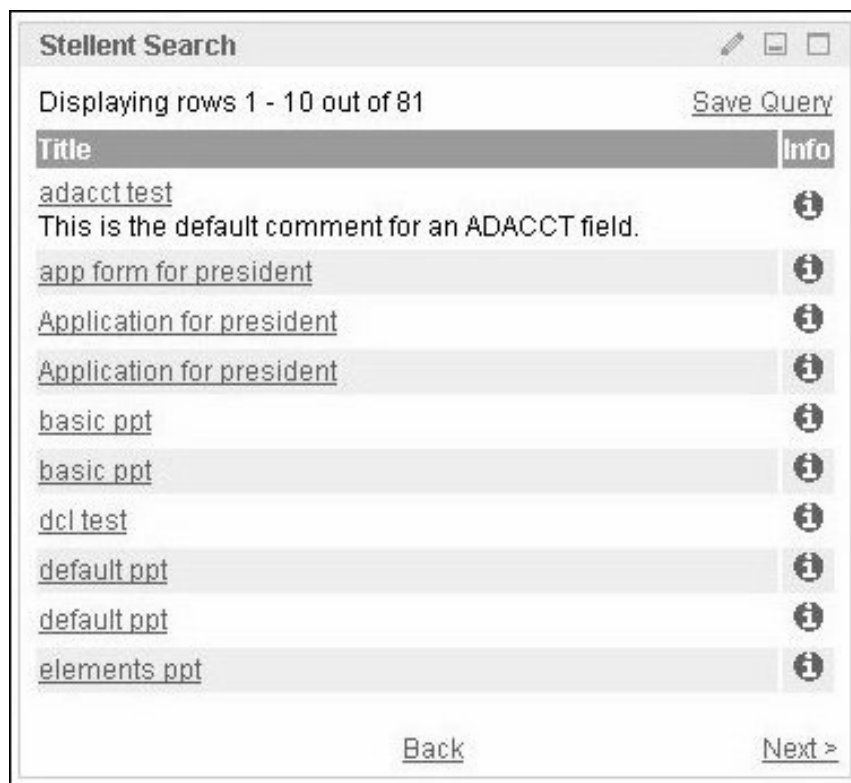


Figure 4-10 The Stellent Search portlet—search results.

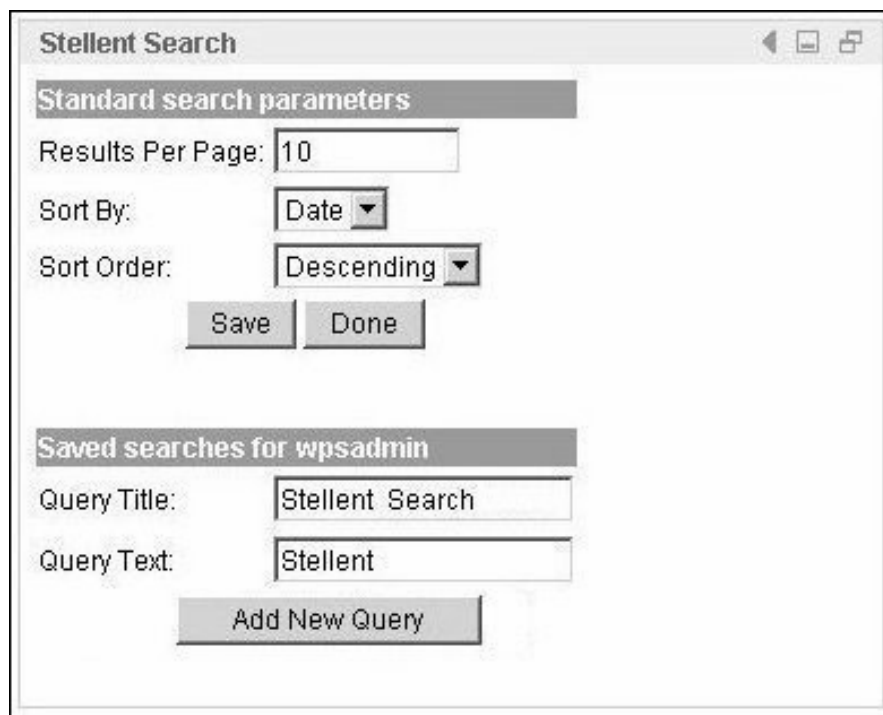
3. Click **Back**.
4. Click the **Edit** icon.

The Stellent Search portlet edit page is displayed.

5. Define your search criteria (see figure 4-11).

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

- ❖ **Results Per Page** - The number of search results displayed on each page (e.g., 5, 10, 15, etc.).
- ❖ **Sort By** - The sort criteria for the search results (e.g., Date, Title, Author, etc.).
- ❖ **Sort Order** - The sort order. Options are *Ascending* or *Descending*.
- ❖ **Query Title** - The user defined name for the search (e.g., My Search, Accounting Forms, etc.).
- ❖ **Query Text** - The text used to define the search (e.g., Stellent, Forms, Employees, etc.).



The screenshot shows a web browser window titled "Stellent Search". Inside the window, there are two main sections. The first section, titled "Standard search parameters", contains three input fields: "Results Per Page:" with the value "10", "Sort By:" with a dropdown menu showing "Date", and "Sort Order:" with a dropdown menu showing "Descending". Below these fields are two buttons: "Save" and "Done". The second section, titled "Saved searches for wpsadmin", contains two input fields: "Query Title:" with the value "Stellent Search" and "Query Text:" with the value "Stellent". Below these fields is a button labeled "Add New Query".

Figure 4-11 The Stellent Search portlet—search criteria defined.

6. Click **Save**.
7. Click the **Back** icon to return to the search page.

Stellent Contribution Portlet

1. Locate the Stellent Contribution portlet (see figure 4-12).

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

Figure 4-12 The Stellent Contribution portlet.

2. Enter any required metadata and any desired optional metadata.



Note: Metadata fields are defined by the Stellent Content Server administrator.

3. In the Primary File field, enter the complete path to the content item or click **Browse** to select the business content for check in.

This example checks in content that will be included in a pre-defined workflow. (see figure 4-13).

The image shows a web form titled "Stellent Contribution". It contains several input fields and buttons:

- Content ID:** A text input field.
- Type:** A dropdown menu with "Acme Accounting Department" selected.
- Title:** A text input field containing "testwf 3".
- Security Group:** A dropdown menu with "Jsp" selected.
- Account:** A dropdown menu.
- Primary File:** A text input field containing "C:\workflow\inbox.txt" and a "Browse..." button.
- Comments:** A text area containing "Updated for 2002".
- Buttons:** "Check In" and "Clear" buttons at the bottom.

Figure 4-13 The Stellent Contribution portlet—content submission.

4. Click **Check In** to submit the business content.

Stellent WorkflowInbox Portlet

1. Locate the Stellent WorkflowInbox portlet (see figure 4-14).

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

The image shows a web portlet titled "Stellent WorkflowInbox". It contains a table with the following headers:

Title	Workflow Info	Last Action	Actions	Info

Figure 4-14 The Stellent WorkflowInbox portlet—no workflow items listed.



Important: 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.

For example, a criteria workflow could be created with these properties:

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

Example workflow step properties:

- Name: StepOne
- Type: Reviewer
- User: wpsadmin
- Workflows are configured by the Stellent Content Server administrator using the Workflow Admin applet.



Note: Workflows are configured by the Stellent Content Server administrator using the Workflow Admin applet.

2. After creating a workflow, access the Stellent portlets on WebSphere Portal Server.
3. Log in as a workflow reviewer (e.g., user1, wpsadmin, etc.) and check in a content item matching the specified criteria.
4. Review the entries listed in the Stellent WorkflowInbox portlet (see figure 4-15).

The Stellent WorkflowInbox portlet provides this functionality:

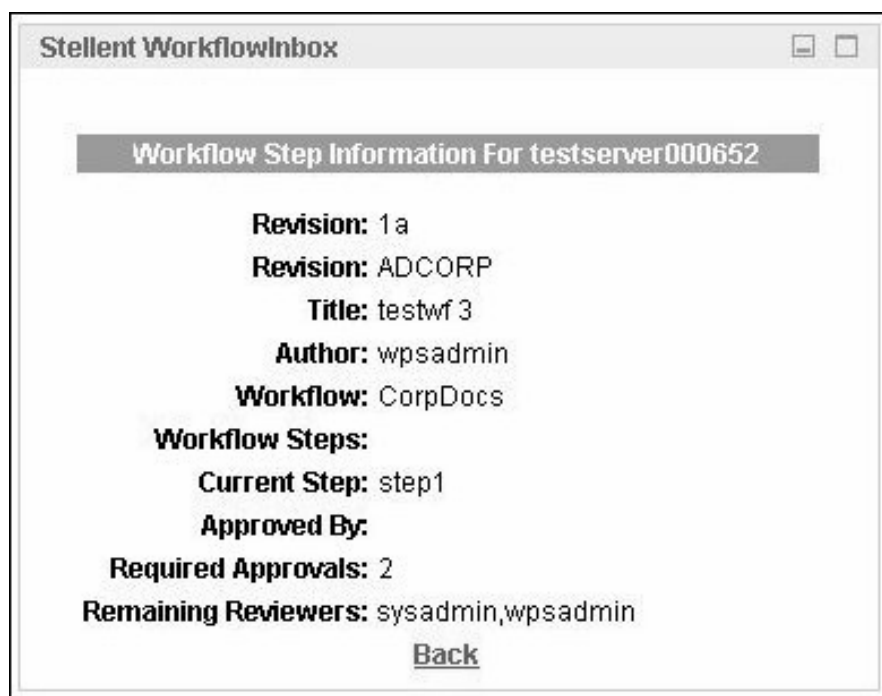
- ❖ **Title** - Lists the content item. Click to download file.
- ❖ **Workflow Info** - Lists the active step. Click to view workflow step information.
- ❖ **Last Action** - Lists the last action the user performed on the workflow.
- ❖ **Action** - Users defined as Reviewers can *Approve* or *Reject*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



Title	Workflow Info	Last Action	Actions	Info
test wf again	step1	APPROVE		
testwf 3	step1		Approve / Reject	
another wf test	step1		Approve / Reject	

Figure 4-15 The Stellent WorkflowInbox portlet—workflow items listed.

- Click the Workflow Info step on any of the workflow items (e.g., the step1 link).
The workflow step information is displayed (see figure 4-16).



Workflow Step Information For testserver000652

Revision: 1a

Revision: ADCORP

Title: testwf 3

Author: wpsadmin

Workflow: CorpDocs

Workflow Steps:

Current Step: step1

Approved By:

Required Approvals: 2

Remaining Reviewers: sysadmin,wpsadmin

[Back](#)

Figure 4-16 The Stellent WorkflowInbox portlet—step information.

- Click **Back**.

CUSTOMIZE THE STELLENT CONTENT PORTLET

OVERVIEW

This chapter provides information on customizing the Stellent Content portlet. This portlet displays the queries pre-defined by the WebSphere Portal Server administrator. It is assumed that all of the installation steps have been performed and that the Stellent Content portlet is accessible.

This section covers the following topics:

- ❖ [Define Business Content for the Stellent Content Portlet](#) (page 5-2).
- ❖ [Load the Edited Stellent Content Portlet](#) (page 5-6).
- ❖ [Java Server Page Example](#) (page 5-10).



Note: These procedures are performed by a WebSphere Portal Server administrator and are not user configurable.

DEFINE BUSINESS CONTENT FOR THE STELLENT CONTENT PORTLET

WebSphere Portal Server administrators can define the business content displayed to users in the Stellent Content portlet. The fields in the content.jsp page (in the StellentContent.war file) can be edited to define business content such as the sort order, sort field, and the search name to be displayed to the user. A query string defines the parameters to search on. Any metadata field can be used to define the search query.

Follow these steps to access the content.jsp file:

1. Locate the unpackaged Stellent_IBM_Portlets_61.zip file on your local server.

This zip file was unpackaged prior to the installation and configuration of Stellent Portlets. See [Portlet Installation and Configuration](#) (page 3-3) for additional information.

For example:

C:/StellentPortlets/



Note: This directory contains the StellentContent, StellentContribution, StellentSavedSearches, StellentSearch, and StellentWorkflowInbox WAR files.

2. Unpackage the StellentContent.war file (any utility such as WinZIP may be used).
3. Open the content.jsp file in a text-only editor.

Edit the Content JSP Page

Customizing the Stellent Content portlet consists of editing these entries on the content.jsp page (in the StellentContent.war file):

- ❖ QueryName
- ❖ QueryDesc
- ❖ QueryText

If desired, the sortOrder, resultCount, or sortField entries for the Stellent Content portlet can also be edited (see figure 5-1):

- ❖ sortOrder - The sort order. Allowed values are “asc” (ascending) and “des” (descending).
- ❖ resultCount - The number of results to return. For example, “5” or “10”.

- ❖ **sortField** - The name of the metadata field to sort on. For example, “dInDate”, “dDocTitle”, or “alternateFile”.

```
String sortOrder = "asc";
String resultCount = "10";
String sortField = "dDocTitle";
```

Figure 5-1 The content.jsp file—optional fields to edit.

Any metadata field can be used for the **sortField** entry. However, the actual parameter name not the title must be used.

For example:

- ❖ **dInDate** **not** Release Date
- ❖ **dDocAuthor** **not** Author
- ❖ **dDocType** **not** Type



Important: Do not directly edit the listed **queryName**, **queryDesc**, or **queryText** entries. These entries are the values you define for **QueryName**, **QueryDesc**, and **QueryText** and are passed in as string values (see figure 5-2).

```
String queryName = "";
String queryDesc = "";
String queryText = "";
String sortOrder = "asc";
String sortField = "dDocTitle";
String resultCount = "10";
```

Figure 5-2 The content.jsp file—query return information defined.

Edit QueryName and QueryDesc Entries

Edit the **QueryName** and **QueryDesc** entries (see figure 5-3). The **QueryName** is the search title displayed to the user and the **QueryDesc** is the short search description displayed to the user (see figure 5-4).

For example:

- ❖ "What's New"
"Content from the past 30 days"
- ❖ "Admin's Thoughts"
"Notes and tips from the system administrator"
- ❖ "Accounting Forms"
"All accounting policies and related info"

```
Properties pC = new Properties();  
pC.setProperty("QueryName", "Accounting Forms");  
pC.setProperty("QueryDesc", "All accounting policies and related  
info");
```

Figure 5-3 The content.jsp file—QueryName and QueryDesc entries.



Figure 5-4 The Stellent Content portlet—with pre-defined queries.

Edit the QueryText Entry

Edit the QueryText entry by defined the query string using standard IdocScript notation (see figure 5-5). To code a query string, use a pre-defined metadata parameter, a query string modifier, and an appropriate metadata value or IdocScript function.

```
pC.setProperty("QueryText", "dDocType <matches> `ADACCT`");  
content.add(pC);
```

Figure 5-5 The content.jsp file—QueryText entry.

Any predefined metadata parameter can be used to create commands.

For example:

- ❖ dInDate - The content item release date. This is 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'.

These query string modifiers can be used:

- ❖ contains
- ❖ matches
- ❖ starts
- ❖ ends
- ❖ substring

Any appropriate metadata value or IdocScript function can be used to create commands.

For example:

- ❖ Returns content items checked in within the past thirty days:

```
("QueryText", "dInDate > <$dateCurrent(-30)$>");
```

- ❖ Returns content items checked in by author sysadmin:

```
("QueryText", "dDocAuthor <matches> `sysadmin`");
```

- ❖ Returns content items checked in as type ADACCT:

```
("QueryText", "dDocType <matches> `ADACCT`");
```

IdocScript has a number of built-in functions. Functions perform actions and also can return results. Sometimes these are the results of calculations or comparisons. IdocScript functions perform various string comparison and manipulation routines, date formatting and ResultSet manipulation.

Information is passed to functions by enclosing the information in parentheses after the name of the function. Pieces of information that are passed to a function are called parameters or arguments. Some functions do not take parameters; some functions take one parameter; some take several. There are also functions for which the number of parameters depends on how the function is being used. Some of the most commonly used functions are those relating to string manipulation and retrieving the current system date.

The dateCurrent IdocScript function returns the current date and time. It can also be used to create commands using date evaluations. An optional parameter can be used to adjust the date by the number of days.

For example:

- ❖ Returns the current date and the current time (e.g., 9/12/01 1:55 PM):
`<$dateCurrent ()$>`
- ❖ Returns the date ten days in the future and the current time (e.g., 9/22/01 1:55 PM):
`<$dateCurrent (10)$>`
- ❖ Returns the date ten days in the past and the current time (e.g., 9/2/01 1:55 PM):
`<$dateCurrent (-10)$>`



Note: Refer to the *IdocScript Reference Guide* and the *IdcCommand Reference Guide* for additional information.

LOAD THE EDITED STELLENT CONTENT PORTLET

Follow these step after the content.jsp page (in the StellentContent.war file) has been edited to define new business content queries or customized searches.

Perform these steps to load the edited Stellent Content portlet:

- ❖ Re-bundle the edited content.jsp file and all associated files as a new StellentContent.war file.



Tech Tip: Rename the old StellentContent.war for use as a backup copy (e.g., old_StellentContent.war.).

- ❖ Uninstall the old Stellent Content portlet.
- ❖ Install the new Stellent Content portlet.

Uninstall the Old Stellent Content Portlet

Follow these steps to install the edited Stellent Content portlet:

1. Log in to WebSphere Portal Server as a valid administrator.
2. From the drop-down list, select **Portal Administration**.
3. Select the **Portlet** tab and then the **Manage Portlets** sub-tab (see Figure 5-6).



Figure 5-6 The Portlets and Manage Portlets tabs.

4. Enable the **Search for portlets** option.
5. Enable the **Active/Inactive portlets** option.
6. In the Name Contains text field enter “Stellent” (see Figure 5-7).

 A screenshot of a search dialog box titled 'Search for portlets'. It contains several options:

- Three radio buttons for search criteria: 'Show all portlets' (unselected), 'Search for portlets' (selected), and 'Name contains:' (unselected).
- A text input field below 'Name contains:' with the text 'Stellent' entered.
- A label 'Show:' followed by three radio buttons: 'Active portlets' (unselected), 'Inactive portlets' (unselected), and 'Active/inactive portlets' (selected).
- A 'Go' button at the bottom left, represented by a magnifying glass icon and the text 'Go'.

Figure 5-7 Search for Stellent portlets.

7. Click **Go**.
The list of Stellent portlets is displayed.
8. Select the Stellent Content Portlet from the list and click **Delete** (see Figure 5-8).

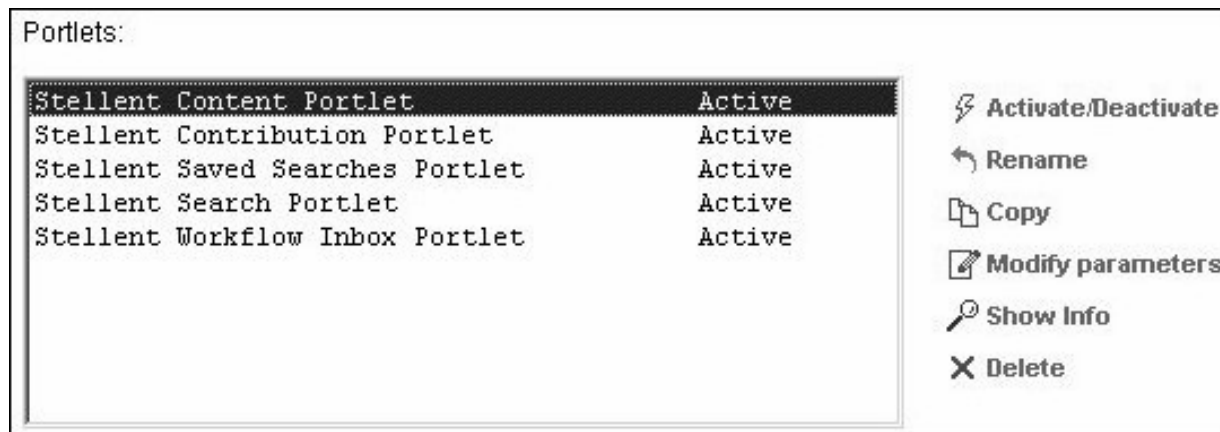


Figure 5-8 List of Stellent portlets.

9. A confirmation box is displayed, click **OK**.
10. Select the **Portlet** tab and then the **Manage Portal Applications** sub-tab (see Figure 5-9).



Figure 5-9 The Portlets and Manage Portlets tabs.

11. Select the StellentContent.war file and click **Uninstall**.
12. Stop and restart WebSphere Portal Server.

Install the New Stellent Content Portlet

Follow these steps to install the new Stellent Content portlet:

1. Ensure that you are logged in as a valid WebSphere Portal Server administrator.
2. From the drop-down list, select **Portal Administration**.
3. Select the **Portlet** tab and then the **Install Portlets** sub-tab (see Figure 5-10).



Figure 5-10 The Portlets and Install Portlets tabs.

4. Click **Browse** and navigate to the directory where the new `StellentContent.war` file is located (see Figure 5-11).

For example:

`C:\Stellent_IBM_Portlets\StellentContent.war`



Note: The edited `content.jsp` file should have been re-bundled as a new `StellentContent.war` file and saved to a location on your local server.

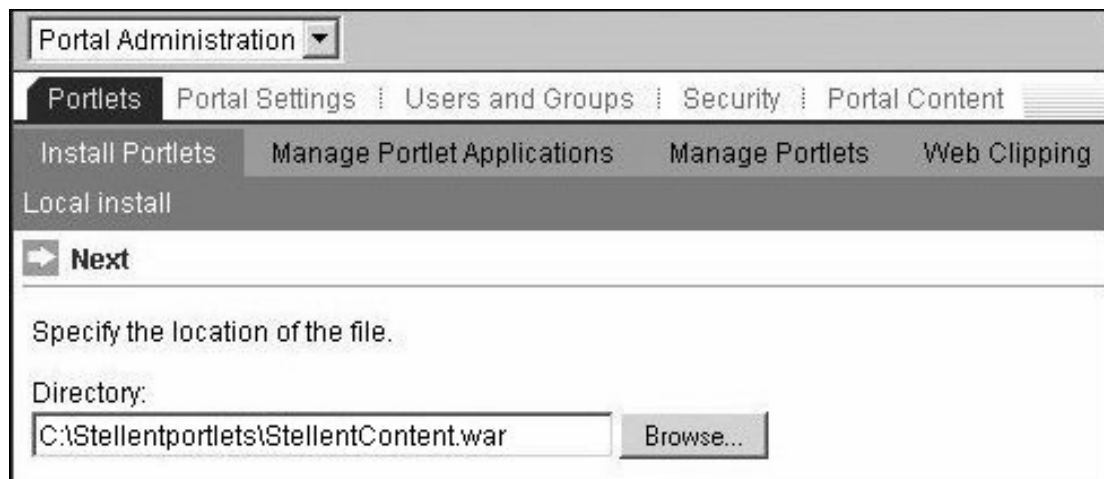


Figure 5-11 Install the new `StellentContent.war` file.

5. Click **Next**.

A confirmation message is displayed.

6. Click **Next**. It may take several minutes for WebSphere Portal Server to load the WAR file.
7. Stop and restart WebSphere Portal Server.

JAVA SERVER PAGE EXAMPLE

```

<%
Properties stateData =
(Properties)session.getAttribute("scsPortalState");
if (stateData != null)
    System.out.println("action = " +
stateData.getProperty("scs.content.action"));

String queryName = "";
String queryDesc = "";
String queryText = "";
String sortOrder = "asc";
String sortField = "dDocTitle";
String resultCount = "10";

// personalization content for edit
Vector content = new Vector();

Properties pA = new Properties();
pA.setProperty("QueryName", "What's New");
pA.setProperty("QueryDesc", "Content from the past 30 days");
pA.setProperty("QueryText", "dInDate > <$dateCurrent(-30)$>");
content.add(pA);

Properties pB = new Properties();
pB.setProperty("QueryName", "Admin's Thoughts");
pB.setProperty("QueryDesc", "Notes and tips from the system
administrator");
pB.setProperty("QueryText", "dDocAuthor <matches> `sysadmin`");
content.add(pB);

Properties pC = new Properties();
pC.setProperty("QueryName", "Accounting Forms");
pC.setProperty("QueryDesc", "All accounting policies and
related info");

```



```
pC.setProperty("QueryText", "dDocType <matches> `ADACCT`");
content.add(pC);

int index, size = content.size();
for(index = 0; index < size; index++)
{
    Properties temp = (Properties)content.elementAt(index);
    queryName = temp.getProperty("QueryName");
    queryDesc = temp.getProperty("QueryDesc");
    queryText = temp.getProperty("QueryText");
%>
```




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