



# **BEA AquaLogic™ Interaction Collaboration**

## **Administrator Guide**



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# Welcome

This book is written for BEA AquaLogic Interaction Collaboration (“Collaboration”) and portal administrators who are responsible for maintaining the portal system, getting information into the portal, creating places for users to collaborate on projects, managing projects, and other tasks that improve the usefulness of the portal.

**Note:** “BEA AquaLogic Interaction Collaboration” is the updated product name for “Plumtree Collaboration”. Additionally, “BEA AquaLogic Interaction” is the updated product name for “Plumtree Foundation” (version 6.x), and “Plumtree Corporate Portal” (version 5.0.x). Some portal objects are still referred to by their old Plumtree names.

# Typographical Conventions

This book uses the following typographical conventions.


**Table 1-1 Typographical Conventions**

Convention	Typeface	Example
<ul style="list-style-type: none"> <li>File names</li> <li>Folder names</li> <li>Screen elements</li> </ul>	<b>bold</b>	<ul style="list-style-type: none"> <li>Upload <b>Procedures.doc</b> to the portal.</li> <li>Open the <b>General</b> folder.</li> <li>To save your changes, click <b>Apply Changes</b>.</li> </ul>
<ul style="list-style-type: none"> <li>Text you enter</li> </ul>	<code>computer</code>	<ul style="list-style-type: none"> <li>Type <code>Marketing</code> as the name of your community.</li> </ul>
<ul style="list-style-type: none"> <li>Variables you enter</li> </ul>	<i>italic</i> <code>computer</code>	<ul style="list-style-type: none"> <li>Enter the base URL for the Portlet Server. For example, <code>http://my_computer/</code>.</li> </ul>
<ul style="list-style-type: none"> <li>New terms</li> <li>Emphasis</li> <li>Portal object example names</li> </ul>	<i>italic</i>	<ul style="list-style-type: none"> <li><i>Portlets</i> are Web tools, embedded in your portal.</li> <li>The URI <i>must</i> be a unique number.</li> <li>The example Knowledge Directory displayed in Figure 5 shows the <i>Human Resources</i> folder.</li> </ul>

# BEA Documentation and Resources

This section describes the documentation and resources provided by BEA.

**Table 1-2 BEA Documentation and Resources (Sheet 1 of 3)**

Resource	Description
Installation Guide	<p>This book is written for Collaboration administrators. It describes how to install and upgrade Collaboration.</p> <p>It is available in electronic form (PDF) in the release package and on <a href="http://edocs.bea.com">edocs.bea.com</a>.</p>
Release Notes	<p>These files are written for Collaboration administrators. They include information about new features and known issues in the release.</p> <p>They are available in electronic form (HTML) on <a href="http://edocs.bea.com">edocs.bea.com</a>.</p>
Developer Guides, Articles, API Documentation, Blogs, Newsgroups, and Sample Code	<p>These resources are provided for developers on the BEA dev2dev site (<a href="http://dev2dev.bea.com">dev2dev.bea.com</a>). They describe how to build custom applications using AquaLogic User Interaction and how to customize AquaLogic User Interaction products and features.</p>
Deployment Guide	<p>This document is written for business analysts and system administrators. It describes how to plan your BEA AquaLogic User Interaction deployment.</p> <p>It is available in electronic form (PDF) on <a href="http://edocs.bea.com">edocs.bea.com</a>.</p>
Online Help	<p>The online help is written for all levels of Collaboration users. It describes the user interface for Collaboration and gives detailed instructions for completing tasks in Collaboration.</p> <p>To access online help, click  <b>Help</b> in the upper-right corner of the portal banner or portlet.</p>

**Table 1-2 BEA Documentation and Resources (Sheet 2 of 3)**

Resource	Description
AquaLogic User Interaction Support Center	<p data-bbox="434 390 1059 621">The AquaLogic User Interaction Support Center is a comprehensive repository for technical information on AquaLogic User Interaction products. From the Support Center, you can access products and documentation, search knowledge base articles, read the latest news and information, participate in a support community, get training, and find tools to meet most of your AquaLogic User Interaction-related needs. The Support Center encompasses the following communities:</p> <p data-bbox="434 638 700 664"><b>Technical Support Center</b></p> <p data-bbox="434 678 1059 760">Submit and track support incidents and feature requests, search the knowledge base, access documentation, and download service packs and hotfixes.</p> <p data-bbox="434 777 588 803"><b>News &amp; Events</b></p> <p data-bbox="434 817 1059 899">The News &amp; Events Center features information on rolling-out a successful deployment. Visit the Super User Group page to collaborate with peers and view upcoming meetings.</p> <p data-bbox="434 916 592 942"><b>Product Center</b></p> <p data-bbox="434 956 1036 1012">Download products, read Release Notes, access recent product documentation, and view interoperability information.</p> <p data-bbox="434 1029 615 1055"><b>Education Center</b></p> <p data-bbox="434 1069 1005 1124">Find information about available training courses, purchase training credits, and register for upcoming classes.</p> <p data-bbox="434 1138 1038 1220">If you do not see the Support Center when you log in to <a href="http://portal.plumtree.com">http://portal.plumtree.com</a>, contact <a href="mailto:ALUISupport@bea.com">ALUISupport@bea.com</a> for the appropriate access privileges.</p>

**Table 1-2 BEA Documentation and Resources (Sheet 3 of 3)**

Resource	Description
dev2dev.bea.com	Download developer tools and documentation, get help with your development project, and interact with other developers via BEA's dev2dev Newsgroups.
Technical Support	<p>If you cannot resolve an issue using the above resources, BEA Technical Support is happy to assist. Our staff is available 24 hours a day, 7 days a week to handle all your technical support needs.</p> <p>E-mail: <a href="mailto:ALUISupport@bea.com">ALUISupport@bea.com</a></p> <p>Phone Numbers:</p> <p>U.S. and Canada+1 415.263.1696 or +1 866.262.PLUM (7586)</p> <p>Asia Pacific+61 2.9931.7822</p> <p>Europe and U.K.+44 (0)1628 589124</p> <p>France+33 1.46.91.86.79</p> <p>Singapore+65 6832.7747</p>

Welcome



# Overview of Collaboration

This chapter provides a basic overview of Collaboration. It describes the components of Collaboration and how they interact with the portal. It includes the following sections:

- [What is Collaboration](#)
- [AquaLogic Interaction Components](#)
- [Collaboration Basics](#)

## What is Collaboration

Collaboration is a component of BEA AquaLogic Interaction. Collaboration integrates directly with AquaLogic Interaction to provide security, search, and other functionality provided by the portal. Collaboration extends this functionality to provide online work spaces that let users work together on a collaborative level.

Some of the features Collaboration provides include:

- Document management and library services
- Notifications, subscriptions, and alerts
- Project and process management
- Task assignment and calendars
- Threaded discussions

## AquaLogic Interaction Components

This section describes the components of AquaLogic Interaction that are used by Collaboration.

### Portal

The portal lets users access portal content via My Pages, Community pages, the Knowledge Directory, and search. It also lets users perform some administrative actions such as view portlet preferences and manage communities.

### Portal and Collaboration Databases

The portal database stores the data used by the portal. This includes information about user profiles, security, and all portal objects. The portal database does not store the documents available through the portal. Source documents are left in their original locations.

The Collaboration database stores the data used by Collaboration. This includes calendar, task, discussion, and subscription information. It also includes information about the documents used by Collaboration. The Collaboration database does not store these documents; they are stored in the Document Repository Service.

### Image Service

The Image Service serves images and other static content used by the portal system. You can connect multiple Administrative Portals and Portals to one installation of the Image Service, or each Administrative Portal or Portal can connect to its own installation of the Image Service. You can also combine these approaches.

If you host the Image Service on a computer different from the portal and Collaboration, users' browsers do not need to send security information for every image request, greatly increasing the efficiency of your portal system.

### Search Service

The Search Service hosts the search engine and search collection, which contains text and metadata indexes for objects in the portal (for example: documents, communities, and portlets). If your portal indexes many documents, the search index can grow to be quite large. At times, this

collection of files can be equal in size to the sum of the ASCII-representations of all of the documents indexed by your portal. Though this is not generally the case, the computer hosting the search index does need sufficient disk space to handle this. As more documents are brought into your portal, the number of unique words (words not already listed in the index) decreases. Therefore, as the number of documents in your portal increases the index size will slow in its growth.

## Document Repository Service

The Document Repository Service stores content uploaded into the portal system such as images used by the Branding Engine or documents uploaded into Collaboration or Publisher.

# Collaboration Basics

This section describes the core functionality of Collaboration.

## Collaboration Projects

Projects are the core element of Collaboration. Projects contain the tasks and documents that facilitate collaborative work among users. Projects are composed of the following functional areas:

- Calendar
- Tasks
- Documents
- Discussions

## Project Explorer

The Project Explorer lets system administrators and project leaders manage multiple projects from a single window.

# Collaboration Portlets

Collaboration contains a set of portlets that provide access to projects and the Project Explorer. The following sections describe the two types of portlets.

## Community Portlets

These portlets are placed in communities and allow group access to projects, providing access to multiple projects or functional areas within a project:

**Table 2-1 Types of Community Portlets**

Portlet Name	Description
Community Announcements	Displays important announcements about a project.
Community Calendar	Displays the events, tasks, and milestones of a project.
Community Discussions	Displays a project’s discussions, which facilitate online communication among project users.
Community Documents	Displays documents associated with a project.
Community Projects	Lets users see all of the projects assigned to a community.
Community Tasks	Displays project tasks and task lists.
Project Search	Lets users search the content of text documents and object properties within a project.

User access to projects and functional areas within a project depend on the roles and access levels assigned to each user. For information on security within functional areas, see [“Access Levels in Functional Areas” on page 3-16](#).

## My Page Portlets

These portlets can be placed on My Pages by individual users:

**Table 2-2 Types of My Page Portlets**

Portlet Name	Description
My Announcements	Lets users view project announcements.
My Calendar	Lets users add calendar items from various projects.
My Discussions	Lets users view selected discussions.
My Documents	Displays documents from selected projects.
My Project Search	Lets users search for items in multiple projects.
My Projects	Displays a list of selected projects.
My Tasks	Displays all tasks assigned to a user.

## Collaboration Profile Portlet

The Collaboration Profile portlet is added to user profile pages to add Collaboration functionality. It should not be added to communities or My Pages.

## Advanced Collaboration Features

The following advanced features allow Collaboration to be used with the Windows desktop and other common applications:

**Table 2-3 Descriptions of Advanced Collaboration Features**

Advanced Feature	Description
Groupware Integration	Lets you configure and test a back-end groupware server so users can integrate Microsoft Exchange or Lotus Notes calendars with Collaboration.
Desktop Integration	Lets users integrate Collaboration with the Windows desktop.
Microsoft Project Import	Lets users import Microsoft Project files into a Collaboration calendar.

## Overview of Collaboration

For more information on using and configuring these features, see [“Integrating Collaboration” on page 5-1](#).

# Administering Collaboration

This chapter provides information on the tasks required to administer and maintain Collaboration. It includes the following sections:

- [Working with the Collaboration Administration Utility](#)
- [Configuring Collaboration for Importing Files into the Knowledge Directory](#)
- [Working with Collaboration Security](#)
- [Working with My Account Settings](#)
- [Working with Collaboration Configuration Files](#)
- [Setting Up Collaboration Logging](#)

## Working with the Collaboration Administration Utility

This section outlines the tasks that can be performed using the Collaboration Administration utility. It includes the following sections:

- [Accessing the Collaboration Administration Utility](#)
- [Performing Diagnostic Tests](#)
- [Configuring Miscellaneous Settings](#)
- [Restricting the Size of Single File Uploads](#)
- [Setting Up Collaboration for Publishing](#)

- [Configuring Groupware Servers](#)
- [Changing Collaboration Notification Settings](#)
- [Working with the Search Service](#)
- [Granting Portal Access to Collaboration](#)

## Accessing the Collaboration Administration Utility

To access the Collaboration Administration utility:

1. Log in to the portal.
2. Click the **Administration** tab.
3. Select **Collaboration Administration Utility**.

## Performing Diagnostic Tests

The Diagnostics page provides diagnostic and configuration information about the various components of Collaboration. To access this page, you must be in the Collaboration Administrators portal group.

If there is a failure with one of the components, the Diagnostics page displays the failure, related settings, and a possible resolution. We recommend that you check diagnostics:

- After you have installed Collaboration
- After the system has failed. For example, you can check the Diagnostics page to confirm that the Notification Service is down if users have stopped receiving notification messages for subscriptions

Each test returns one of these messages to the Status column:

- **OK:** The installation or startup was successful, or the component is functioning correctly
- **FAIL:** The installation or startup was not successful, or the component is not functioning correctly.

The message provides a reason for failure and might provide troubleshooting recommendations.

- **NOT ENABLED:** The component is not enabled. This is not necessarily an error if the component is not being used



This table describes the diagnostics that are provided for Collaboration's components:

**Table 3-1 Collaboration Diagnostics**

Test	Description
Collaboration Startup and DB	Verifies that Collaboration started up successfully.
Collaboration Notification Service	Verifies that the Notification Service is enabled and running.
Document Repository Service	Verifies that the Document Repository Service is running.
Search Service	Verifies that the Search Service is running.
Groupware Exchange SOAP Service	Verifies that the Groupware Exchange SOAP service is running.  <b>Note:</b> For this test to run, you must enable Groupware Exchange SOAP Service and configure Microsoft Exchange as the back-end server. If Groupware Exchange SOAP Service is not enabled, a Not Enabled message appears.
JSControls ( <i>version_number</i> ) Configuration and JavaScript Files from the Image Service	Verifies that you have correctly installed the JSControls component. In the application, the version number of JSControls appears instead of <i>version_number</i> .
Portal Connection through PTAPI	Verifies that the API Service is running.

If the portal is down, you can access the Diagnostics page by typing the following URL in a browser's address bar: `http://<server_name>:<port_number>/collab/admin/diagnostic/index.jsp`. For example: `http://brettg-gx:8080/collab/admin/diagnostic/index.jsp`.

**Note:** When you access the Diagnostics page by typing the URL, the JS Controls and Portal Connection tests are not visible.

You can also perform diagnostic tests on the groupware servers that are integrated with Collaboration. For information on testing groupware servers, see [“Testing Groupware Servers” on page 3-9](#)

## Configuring Miscellaneous Settings

The following sections describe configuration options on the Miscellaneous Settings page.

### Enforcing the Maximum Size of Projects

If you want to limit the size of projects, select **Enforce a Maximum Project Size**, then type the size limit in megabytes. Set the storage space according to the anticipated number and size of documents or files and their revisions.

By default, Collaboration does not limit the size of projects. If a project size limit was previously set and you want to go back to the original setting of unlimited project sizes, clear the check box.

The size limit is for individual projects, not the entire collection of projects in Collaboration. This setting affects every project in Collaboration. A project administrator can define the maximum size for a specific project in that project's General Settings page; the size defined on that page cannot exceed the value that you type into the box next to the **Enforce a Maximum Project Size** check box.

**Note:** Collaboration includes objects in the Project Recycle Bin in its calculation of a project's memory usage.

### Enabling Personal Projects

The personal projects feature lets users create and maintain their own personal project. A personal project contains documents, task lists, notes, and calendar features. To enable this feature, select **Enable Personal Projects**. To restrict the size of each personal project, type the size in megabytes.

By default, Collaboration does not limit the size of personal projects. If a project size limit was previously set and you want to go back to the original setting of unlimited project sizes, clear the check box.

After you have performed these steps, you must grant the correct activity rights to the groups you want to let use this feature by performing the following:

1. Click the **Administration** tab.
2. Select the **Activity Manager** utility.
3. Click **Own Collaboration Personal Project**.

4. Click **Add Group**.
5. Select the groups you want to add.
6. Click **OK**.
7. Click **Finish**.

## Enabling WebDAV

If you want your users to use Collaboration's desktop integration features, select **Enable WebDAV**. To be able to select and clear this check box, you must set the *fullWebDAVAccessToThisServer* node in the config.xml file to *yes*. Config.xml also includes other nodes that you must set for WebDAV. Changes that you make to this option are never carried over to config.xml.

## Enabling WebEdit

If you want your users to edit Microsoft Office documents on their desktop, select **Enable WebEdit**. To be able to select and clear this check box, you must set the *webEdit enabled* node in the config.xml file to *yes*. Config.xml also includes other nodes that you must set for WebEdit. Changes that you make to this option are never carried over to config.xml.

## Enabling Bulk Upload

If you want your users to upload multiple files and folders or map Web folders to Collaboration, select **Enable bulk upload**. To be able to select and clear this check box, you must set the *bulkUpload enabled* node in the config.xml file to *yes*. Config.xml also includes other nodes that you must set for Bulk Upload. Changes that you make to this option are never carried over to config.xml.

## Enabling Zip Download

If you want your users to be able to download folders and multiple documents as .zip files, select **Enable zip download**. Type the size limit for the .zip file in the box. The download aborts if the .zip file exceeds the size limit.

## Hiding Unused Project Folders

If you want to hide project folders that contain only projects that users cannot access, select **Hide project folders that contain only projects a user cannot access**. By default, this check box is cleared.

**Note:** Enabling this option might cause the Project Explorer to perform more slowly due to the added security checks.

## Restricting the Size of Single File Uploads

If you want the maximum size of an uploaded file to be anything other than the default, type a number from 1 to 999 into the **Maximum single file upload in MB** box. The default is 10 MB. Collaboration always uses the setting that you configure here except during upgrade, when it uses the *maxUploadMegabytes* node in config.xml. Changes that you make to this option are never carried over to config.xml.

## Restricting the Size of Discussion Messages

If you want the maximum number of characters in a message to be anything other than the default, type a number from 1000 to 99999 into the **Maximum discussion message in characters** box. The default is 16000. Collaboration always uses the setting that you configure here except during upgrade, when it uses the *maxMessageChars* node in config.xml. Changes that you make to this option are never carried over to config.xml.

## Creating, Editing and Deleting Holidays

The Holidays page lets you create, change the properties of and delete holidays from Collaboration's calendar. You can create a maximum of one holiday per day. Holidays appear on and affect every project calendar in Collaboration. You cannot create, edit or delete holidays from the Calendar portlets or projects.

## Setting Up Collaboration for Publishing

You can set up Collaboration so that users can manually publish files into the Knowledge Directory (“KD”) by configuring the Collaboration KD Content Source. The Collaboration KD content source must be configured before any publishing activity can take place. This section discusses how to configure the Collaboration KD content source. For more information on setting up crawlers for automatic importing of files into the Knowledge Directory, see [“Configuring Collaboration for Importing Files into the Knowledge Directory” on page 3-12](#)

To configure a content source for publishing to the Knowledge Directory:

1. Go to the **Collaboration Administration** utility.
2. Click **Publish to Directory**.
3. Click **Configure a Content Source**.
4. In the Content Source dialog box, select **Collaboration KD**.
5. Click **OK**.
6. Click **Finish**.

**Note:** Once a document is published to the Knowledge Directory, access to the published version from the KD inherits the access settings of the parent KD folder. For example, if the Everyone group has Read access to the Knowledge Directory folder, the version of the Collaboration document published will be accessible from the KD by all users, including Guest Users.

## Configuring Groupware Servers

To configure a new groupware server:

1. Go to the **Collaboration Administration** utility.
2. Click **Groupware Servers**.
3. Click **Add Server**.
4. Enter the configuration information:

If you are configuring a Microsoft Exchange back-end server, enter the following configuration information:

**Table 3-2 Microsoft Exchange Configuration Parameters**

Parameter	Description
Server Name/IP/URL	<p>The server name, IP address, or URL of the groupware server.</p> <p><b>Note:</b> If you are upgrading Collaboration from 3.x, you should use the value of the <b>serverURL</b> element in the 3.x version of the configuration file and add the http:// protocol prefix.</p> <p><b>Example:</b> http://mail.company.com/exchange</p>
Alias	An optional descriptive name for this groupware server.

If you are using a Lotus Domino back-end server, enter the following configuration information:

**Table 3-3 Lotus Domino Configuration Parameters**

Parameter	Description
Server Name/IP/URL	<p>The server name, IP address, or URL of the groupware server.</p> <p><b>Note:</b> If you are upgrading Collaboration from 3.x, you should use the value of the <b>serverURL</b> element in the 3.x version of the configuration file and add the http:// protocol prefix.</p> <p><b>Example:</b> http://mail.company.com/exchange</p>
Alias	<p>An optional descriptive name for this groupware server, which will be available to end users.</p> <p><b>Example:</b> MyCompany Exchange Server</p>
Server Port	If your server port number is other than 80, type a port number; otherwise leave this blank.
Proxy Host/Firewall Port	If you are using a proxy server or a firewall, type the host name; otherwise leave this blank.
Use SSL	If you are using https, select the check box.
HTTPS Port	If you are using an https port number other than 443, type the port number; otherwise leave this blank.

**Table 3-3 Lotus Domino Configuration Parameters**

Session Based Authentication	If you are using form-based authentication (cookies), select this; if you are using basic authentication, clear the check box.
Notes Server Temp Dir	Type the local directory of the Lotus Domino server that stores the attachments.
Notes Server Temp UNC	Type the UNC path of the directory of the Lotus Domino server that stores the attachments. This should be the same directory that you typed in the Notes Server Temp Dir box. For example: \\<Lotus Domino server name>\<folder name>.

**Note:** Other tasks are required for groupware integration besides configuring this page. For complete information, see [“Integrating Collaboration and Groupware” on page 5-12](#)

## Testing Groupware Servers

You can perform a diagnostic test on all of the groupware servers that are integrated with Collaboration.

To test groupware servers:

1. Go to the **Collaboration Administration** utility.
2. Click **Groupware Servers**.
3. Click **Test Servers**.

**Note:** This button does not appear in Linux and other UNIX platforms.

Test results appear in the Status column for each groupware server. Each test returns one of these messages:

- **OK:** The groupware server is functioning correctly
- **FAIL:** You incorrectly added the groupware server, or the groupware server is not functioning correctly

The message provides a reason for failure and might provide troubleshooting recommendations. The detailed error information can be found in the Collaboration log. You can find the log at:

- The top of the Diagnostics page in the Collaboration Administration Utility (click the **here** link)

– <collab\_install\_directory>\<version\_number>\settings\logs\collaboration.log

## Changing Collaboration Notification Settings

You can specify the time when Collaboration Notification generates and mails summary notifications to project users. The summary job time is executed according to the machine time on which Collaboration is installed.

To configure the summary job time:

1. Go to the **Collaboration Administration** utility.
2. Click **Collaboration Notification**.
3. Select the hour and minute for the summary job time.
4. Click **Finish**.

Additionally, end users can set the format (plain text or HTML) of notification e-mails that are sent to them by navigating to My Account, Collaboration Settings, Subscriptions and selecting the desired format. For details see Collaboration Online Help.

## Working with the Search Service

The Collaboration Administration utility lets you monitor the status of the Search Service and rebuild its data.

### Viewing Search Service Status

Collaboration provides the following information about the Search Service:

**Table 3-4 Descriptions of Search Service Statuses**

Status	Description
Uptime	The length of time the Search Service has been running.
Installation Directory	The location where the Search Service is installed.



**Table 3-4 Descriptions of Search Service Statuses**

Status	Description
Objects Currently Indexed	The number of Collaboration items in the Search Service index.
Pending Index Requests	The number of requests outstanding for indexing Collaboration objects.

## Rebuilding the Search Collection

Rebuilding reconciles data between the Collaboration database and Search Service index. Since this is a lengthy and computationally expensive process, use the rebuild operation only when absolutely necessary.

To rebuild the Search Service database:

1. Go to the **Collaboration Administration** utility.
2. Click **Search Service**.
3. Click **Rebuild Search Collection**.
4. Click **OK**.

## Granting Portal Access to Collaboration

When Collaboration is configured, it is associated with a primary portal, known as the *owning portal*. Collaboration has a direct relationship with its owning portal, including access to the owning portal's database.

Every portal accessing Collaboration sends an authentication name and password. Collaboration uses this authentication information to ensure that the attempted access is coming from the owning portal. The owning portal is assigned a unique authentication identifier so that Collaboration can identify each portal.

## Changing the Owning Portal

Collaboration determines its owning portal based on the values specified in config.xml. However, you can also change the owning portal using the Collaboration Administration utility by performing the following:

1. Access the **Collaboration Administration** utility.
2. Click **Portal Access**.
3. Manually enter the values for the following fields:
  - Web Service ID
  - Gateway Page URL
  - Collaboration Service URL
4. Click **Finish**.

## Configuring Collaboration for Importing Files into the Knowledge Directory

You can configure crawlers to automatically import files from Collaboration into the Knowledge Directory. This section discusses:

- [Configuring Content Crawlers for Importing Files](#)
- [Configuring Collaboration Document Properties](#)

For more information on setting up Collaboration so that users can manually publish files into the Knowledge Directory, see [“Setting Up Collaboration for Publishing” on page 3-7](#)

**Note:** Collaboration Content Crawlers are only supported with Foundation 6.0.

## Configuring Content Crawlers for Importing Files

You create content crawlers from the Collaboration Crawler Content Source to import files from Collaboration into the Knowledge Directory. You must use the Collaboration Crawler Content Source with Collaboration content crawlers. The authentication settings for the Collaboration Crawler Content Source must match the authentication settings in the Collaboration Remote Server object.

The API Service and the Automation Service must be installed for Collaboration files to be imported into the Knowledge Directory. For more information about installing them, see the *Installation Guide for BEA AquaLogic Interaction* (Plumtree Foundation).

To configure a content crawler for importing files from Collaboration into the Knowledge Directory, perform the following on the content crawler's Main Settings page:

- Click **Browse** next to the Project icon to choose the project that contains the folder that you want the content crawler to access. You can only select projects for which you are a Project Leader.
- Click **Browse** next to the Folder icon to choose a folder. You must have Admin access to the folder. Additionally, you must make this folder content crawler-accessible by selecting **Accessible to Content Crawlers** in the folder's properties. Content crawler accessibility settings are passed down to child folders.

By default, the maximum number of levels within the folder that the content crawler can access is unlimited. You can change this number using the **Maximum number of levels to crawl** drop-down list.

We recommend the following settings for content crawlers that import files into the Knowledge Directory:

- On the content crawler's Main Settings page, select the **Mirror the source folder structure** option
- On the content crawler's Advanced Settings page:
  - Select the **from this Content Source** option
  - Select the **refresh them** option
  - Select the **regenerate deleted links** option

Error information about content crawler jobs can be found in:

- The job history for each content crawler job
- The Collaboration log, which can be found at:
  - The top of the Diagnostics page in the Collaboration Administration Utility (click the **here** link)
  - <collab\_install\_directory>\<version\_number>\settings\logs

For more information about creating content crawlers, see *Administrator Guide for BEA AquaLogic Interaction* (Plumtree Foundation).

## Configuring Collaboration Document Properties

Documents that are published and crawled into the Knowledge Directory contain the Checked In By property, which is a Collaboration property that contains the name of the user who checked in the version of the document that is accessible in the Knowledge Directory. In order for the Checked In By property to be displayed, you must add it to the Global Document Property Map by performing the following:

1. Log in to the portal.
2. Click the **Administration** tab.
3. From the Utilities drop-down list, select **Global Document Property Map**.  
The Global Document Property Map appears.
4. Click **Add Property**.
5. In the Add Property window, select **Checked In By**.
6. Click **OK**.  
The Checked In By property is added to the Global Document Property Map page.
7. Click the **Checked In By** link.
8. In the Document Attributes column of the Checked In By Row, type: *CheckedInBy* .
9. Click **Finish**.

## Working with Collaboration Security

This section describes the security model used by Collaboration. Collaboration security is based on the concept of roles, access levels, and activity rights. These are described in the following sections.

## Roles

Collaboration security is set and managed through project roles. A portal user can access a project only when assigned a role in that project. Collaboration contains the following roles:

**Table 3-5 Descriptions of Project Roles**

Role	Description
Project Leader	<p>The Project Leader role has read/write access for the project and its objects. Project Leaders can:</p> <ul style="list-style-type: none"><li>• create, edit, and delete the project and its objects</li><li>• set permissions for project objects</li><li>• perform all project tasks</li></ul> <p><b>Note:</b> Portal administrators are default members of the Project Leader role and cannot be removed.</p>
Project Member	<p>By default, the Project Member role has write permission for Collaboration objects.</p>
Project Guest	<p>By default, the Project Guest role has read permission for project objects, but cannot make any changes.</p>

Role assignments are project-specific, and the same portal user can have different roles in different projects.

Additionally, under the same role, users can have different permissions in different projects, because the role itself can have one set of permissions in one project and a different set of permissions in another.

## Access Levels

All Collaboration objects have five levels of access that can be assigned to them. These access levels are:

- Admin
- Edit
- Write

- Read
- No Access

Each access level inherits the rights of all lower access levels. By default, users inherit access levels directly from the project based on the roles they have been granted. Users who create objects are given Admin access to the object. Project leaders have the ability to remove owners from any object in the project.

### Access Levels in Functional Areas

Each role has an associated access level in each functional area of Collaboration. The following table shows what permissions each access level allows in each functional area:

**Table 3-6 Permissions Matrix**

	<b>Discussions</b>	<b>Task Lists</b>	<b>Documents</b>	<b>Folders</b>	<b>Calendar</b>
Read	Read	Read	Read	Read	Read
Write	Post	Claim Task Create Task Update Status	Check in/out	Insert Documents Create Folders	Create Events
Edit	Copy Edit Create Discussions Attach Links	Copy Edit Create Task Lists Attach Links Assign Owners	Copy Edit Create Shortcuts Publish Revert Versions	Copy Edit Insert Folders Rename	Edit Attach Links
Admin	Delete Move Security	Delete Move Security	Delete Move Security Check-out Override	Delete Move Security	Delete Security

## Activity Rights

Collaboration uses the following activity rights to grant access to various functionality:

**Table 3-7 Descriptions of Activity Rights**

Activity Right	Description
Ability to View Instant Messaging Presence	Allows users to see the instant messaging presence icon on Collaboration pages.
Bulk Upload to Collaboration	Allows users to: <ul style="list-style-type: none"> <li>• Upload multiple files and folders at the same time</li> <li>• Map Web folders to Collaboration</li> </ul>
Manage Collaboration	Allows users to create project folders, delete existing project folders, move existing project folders, edit existing project folders and use the Project Recycle Bin.
Manage Collaboration Projects	Allows users to create projects, archive projects, manage project templates, remove projects from the Recycle Bin System Folder and undelete projects out of the Recycle Bin System Folder.
Own Collaboration Personal Project	Allows users to have a personal project.

## Granting Activity Rights to Users

To grant an activity right to a user:

1. Log in to the portal.
2. Click the **Administration** tab.
3. From the Select Utility drop-down menu, select **Activity Manager**.
4. Click the activity right you want to edit.
5. Click **Add Groups**.
6. Select the group you want to add.
7. Click **OK**.
8. Click **Finish**.

For more information on using activity rights, see the *Administrator Guide for BEA AquaLogic Interaction* (Plumtree Foundation).

### Default Project Security

Collaboration provides default security settings that are automatically applied to a project when it is created. A system administrator can change these defaults across the entire Collaboration instance. However, Project Leaders can change default security settings for their individual projects.

Project security is a combination of:

- Access levels to Collaboration objects
- Individual activity permissions for Collaboration objects

## Working with My Account Settings

This section describes the My Account settings that are specific to Collaboration. To access these settings:

1. Log in to the portal.
2. Click **My Account**.
3. Click **Collaboration Settings**.



The following pages are available from the Collaboration Settings page:

**Table 3-8 Collaboration Settings Pages**

Collaboration Settings Page	Description
Subscriptions	<p>Lists all of a user's subscriptions. Users can manage their subscriptions, deleting the ones they no longer want and specifying the types of notification e-mail they want for each subscription. Users add notification subscriptions to documents and discussions by subscribing to them. Notification about tasks is managed by the person who creates the tasks, not by the subscribing user. Users can choose to receive:</p> <ul style="list-style-type: none"> <li>• Immediate notification</li> <li>• Summary notification of all messages for the day</li> <li>• Both types of notification</li> </ul> <p>If users want to delete a subscription, they must clear all relevant check boxes. Users can browse their subscriptions by project or view them all by clicking <b>All Projects</b>.</p>
Display Settings	<p>This page lets users to define their own pagination preferences and set display mode options. Explorer Pagination lets users define pagination preferences for Collaboration explorers. Display Mode lets users choose from Standard or Simple display mode.</p>
Calendar Synchronization	<p><i>Available to users if you have enabled the <code>calendar.AutoSynch</code> node of <code>config.xml</code>.</i> This page lets users configure settings that enable Collaboration to synchronize calendar information with Microsoft Exchange server or IBM Lotus Notes server.</p>

For more information on these settings see the *Collaboration Online Help*.

## Working with Collaboration Configuration Files

Collaboration uses multiple configuration files that let you customize and expand your deployment. These files are structured XML files. All of these XML files are located in: `<collab_install_directory>\<version_number>\settings\config`.

**Note:** Notification Service configuration files are located in  
 <PT\_HOME>\ptnotification\<version\_number>\settings\config.

For detailed information on configuration nodes contained in these files, see [“Working with Configuration Files” on page A-1](#)

The following table provides a general overview of the configuration files:

**Table 3-9 Collaboration Configuration Files**

Collaboration Configuration File	Description
config.xml	The main configuration file for Collaboration. This file allows you to configure various advanced Collaboration settings, including connection information to other components that Collaboration uses (such as search and notification) and advanced settings for features such as bulk upload and WebDAV. By default, it is installed in <PT_HOME>\ptcollab\4.1\settings\config, where <PT_HOME> is, by default, C:\Program Files\plumtree\ . For more information, see <a href="#">“config.xml” on page A-4</a>
documentTemplates.xml	Sets the document templates that are recognized by Collaboration. By default, it is installed in <PT_HOME>\ptcollab\4.1\settings\config, where <PT_HOME> is, by default, C:\Program Files\plumtree\ . For more information, see <a href="#">“documentTemplates.xml” on page A-14</a>
filetypes.xml	Lists file types in Collaboration. By default, it is installed in <PT_HOME>\ptcollab\4.1\settings\config, where <PT_HOME> is, by default, C:\Program Files\plumtree\ . For more information, see <a href="#">“filetypes.xml” on page A-15</a>
database.xml	Configures Collaboration database settings. The configuration file is automatically updated during the installation of Collaboration. By default, it is installed in <PT_HOME>\ptcollab\4.1\settings\config, where <PT_HOME> is, by default, C:\Program Files\plumtree\ . For more information, see <a href="#">“database.xml” on page A-18</a>

**Table 3-9 Collaboration Configuration Files**

<b>Collaboration Configuration File</b>	<b>Description</b>
dr.xml	<p>Configures the connection to the Document Repository Service. By default, it is installed in &lt;PT_HOME&gt;\ptcollab\4.1\settings\config, where &lt;PT_HOME&gt; is, by default, C:\Program Files\plumtree\.</p> <p><b>Note:</b> dr.xml is automatically updated during the installation of Collaboration. Do not modify this file.</p>
audit.xml	<p>Controls the logging and profiling functionality of Collaboration. By default, it is installed in &lt;PT_HOME&gt;\ptcollab\4.1\settings\config, where &lt;PT_HOME&gt; is, by default, C:\Program Files\plumtree\.</p> <p><b>Note:</b> The contents of this file are generated by Collaboration. They should not be modified.</p>
cache.xml	<p>Manages Collaboration caches. By default, it is installed in &lt;PT_HOME&gt;\ptcollab\4.1\settings\config, where &lt;PT_HOME&gt; is, by default, C:\Program Files\plumtree\.</p> <p><b>Note:</b> The contents of this file are generated by Collaboration. They should not be modified.</p>
cluster.xml	<p>Configures settings for Collaboration that is set up in a clustered network environment. By default, it is installed in &lt;PT_HOME&gt;\ptcollab\4.1\settings\config, where &lt;PT_HOME&gt; is, by default, C:\Program Files\plumtree\.</p>
application.xml	<p>Configures Web application deployment settings, such as http and https ports, for Collaboration. By default, it is installed in &lt;PT_HOME&gt;\ptcollab\4.1\settings\config, where &lt;PT_HOME&gt; is, by default, C:\Program Files\plumtree\.</p>
object-migration.xml	<p>Controls object migration in Collaboration. By default, it is installed in &lt;PT_HOME&gt;\ptcollab\4.1\settings\config, where &lt;PT_HOME&gt; is, by default, C:\Program Files\plumtree\.</p> <p><b>Note:</b> The contents of this file are generated by Collaboration. They should not be modified.</p>

**Note:** You create holidays by using the Holidays page in the Collaboration Administration Utility. If you used a pre-4.1 version of Collaboration, you can refer to the holidays.xml configuration file when creating holidays. This configuration file is disabled and only exists for your reference.

## Setting Up Collaboration Logging

Collaboration writes log messages to:

- Collaboration.log, which is the local Collaboration log file. This log file exists in <collab\_install\_directory>\<version\_number>\settings\logs. No setup is required to enable logging to the Collaboration log file and view the log.
- ALI Logging Spy (formerly “Plumtree Logging Spy”), which is the primary log message receiver in the ALI Logging Utilities (formerly “Plumtree Logging Utilities”). ALI Logging Spy provides a graphical user interface for displaying log messages as they stream in from Collaboration and other log message senders (such as the portal or Publisher).

This section discusses:

- [Setting Up Logging Utilities for Collaboration Logging](#)
- [Configuring ALI Logging Spy to Display Collaboration Messages](#)

**Note:** You must set up logging utilities for Collaboration logging before you configure ALI Logging Spy to display Collaboration messages.

## Setting Up Logging Utilities for Collaboration Logging

To set up Collaboration logging, you use the OpenLog section of the audit.xml file. By default, the audit.xml file is installed in <PT\_HOME>\ptcollab\4.1\settings\config, where <PT\_HOME> is, by default, C:\Program Files\plumtree\ . The following is an example of this section and a description of each of the nodes in the section:

```
<openlog enabled="yes">
    <serverName value=""/>
    <restrictToLocalMachine value="no"/>
</openlog>
```

**<openlog enabled> Node**

This node enables or disables OpenLog. By default, *openlog enabled* is set to *yes*.

**<serverName value> Node**

This node:

- Defines the Collaboration logging name, which distinguishes it from all other BEA AquaLogic Interaction applications that use the logging framework
- Facilitates the viewing of Collaboration log messages

During installation, the Collaboration installer sets the Collaboration logging name to:

```
collab.[machine-name].[user-name]
```

In this default, *machine-name* is the name of the machine on which Collaboration is installed. *user-name* is the name of the user who runs the installer.

You can override the default Collaboration logging name by typing your own string into the *<serverName value>* node. The string that you enter must meet these criteria:

- The logging name can contain only visible ASCII characters and the space character. It cannot contain invisible ASCII characters such as tabs, carriage returns, and so on. It also cannot contain the forward slash character (/).
- The logging name cannot exceed 128 characters in length

**<restrictToLocalMachine value> Node**

The *<restrictToLocalMachine>* XML node enables or disables remote spying of Collaboration log messages. When the value is *no*, instances of ALI Logging Spy that run on other machines on the network can receive log messages from Collaboration. When the value is *yes*, only instances of ALI Logging Spy that run on the machine on which Collaboration is installed can receive log messages from Collaboration. The default value is *no*.

For successful remote spying of Collaboration log messages, you must configure the network to allow UDP multicast messages between the machine on which Collaboration is installed and the machine on which ALI Logging Spy is installed. For help with this, see your network administrator.

## Configuring ALI Logging Spy to Display Collaboration Messages

This section discusses how to configure ALI Logging Spy (formerly “Plumtree Logging Spy”) to display Collaboration messages.

**Note:** You must set up logging utilities for Collaboration logging before you configure ALI Logging Spy to display Collaboration messages. For more information, see [“Setting Up Logging Utilities for Collaboration Logging” on page 3-22](#)

To configure ALI Logging Spy to display Collaboration messages:

1. Launch ALI Logging Spy by navigating to **Start | All Programs | Plumtree | PT Logging Utilities | Plumtree Logging Spy**. For more information on using ALI Logging Spy, see the online help provided with ALI Logging Spy.
2. Open the **Filter Settings** dialog box by selecting **View | Set Filters**.
3. To add a logging server, right-click anywhere in the Filter Settings window. The context menu appears.
4. Select **Add Message Sender**. The Add Message Sender dialog box appears.
5. Type a server name or select it from the list of names and click **OK**.

Server names exist in the `<serverName>` nodes of the openLog section in the audit.xml file.

When you add a server as a message sender, it appears as a tree structure in the Filter Settings window. Click the plus sign to expand the server and see a list of its message-sending components.

6. In the **Filters Settings** window, expand each component under a server to see the selected logging levels for that component.

The checkbox next to each component has three states:

- Gray with a check mark: the initial four logging levels (listed above) are selected
- Clear with a check mark: all of the logging levels are selected
- Clear: none of the logging levels are selected

You can toggle through these states by clicking the checkbox next to the component.

7. You can perform the following additional actions in the Filter Settings window:

- To remove a message-sending server and its components, right-click on the server name, and select **Remove Message Sender**
  - To enable a selected logging level for all components of a server, right-click on the server name, and select Enable *<LoggingLevel>*, for example, **Enable Performance**
  - To enable or disable logging levels for a single component, expand the component, and select or clear the checkbox next to the logging level
  - To clear all logging levels for all components of a server, right-click on the server name, and select **Clear All Filters**. Then click **OK** when asked to confirm. This prevents those components from sending logging messages to this instance of ALI Logging Spy
  - To reset logging levels for all components of a server to the original four levels, right-click on the server name, and select **Reset Filters**. Then click **OK** when asked to confirm
8. Click **OK** when finished.

## Filter Settings and Debugging

The filter settings in ALI Logging Spy are independent of the logging levels specified in Collaboration's audit.xml file. The settings in audit.xml affect only the messages written to the collaboration.log file and do not affect the messages that appear in ALI Logging Spy. Conversely, the settings in ALI Logging Spy have no effect on the messages written to the collaboration.log file.

Because the filter settings in ALI Logging Spy are independent of the settings in audit.xml, you can use ALI Logging Spy to debug problems with Collaboration without changing the logging level in audit.xml and restarting Collaboration. To do this, launch ALI Logging Spy and enable the Debug logging level on all relevant components to view debug messages from Collaboration.

**Note:** When you enable the Debug logging level in ALI Logging Spy, you affect Collaboration performance. Do not leave debug logging enabled in ALI Logging Spy for long periods of time when it is used with an installation of Collaboration that is used in a production context.

## Backing Up and Restoring Collaboration

This section discusses how to back up and restore Collaboration.

### Backing Up Collaboration

To back up Collaboration:

1. To ensure that the Collaboration database, portal database, and Document Repository are in sync, perform the following at the same time:
  - Back up the Collaboration database that you created when you installed Collaboration. For details, refer to the instructions for your database type
  - Back up the portal database
  - Back up all of the Document Repository files. By default, they are located in:  
<PT\_HOME>\ptdr\documents\PTCollab
2. Back up Collaboration's configuration files.
3. (Optional) Back up the Search index, which you can rebuild when you restore Collaboration.
4. (Optional) Back up any customizations that exist in your deployment.

### Restoring Collaboration

To restore Collaboration:

1. Shut down the portal and Collaboration.
2. Restore the Collaboration and portal databases.
3. Restore the Document Repository files.
4. Restore Collaboration's configuration files.
5. (Optional) If you backed up the Search index, restore the Search index.
6. (Optional) If you backed up any customizations that exist in your deployment, restore them.
7. Restart the portal and Collaboration.



# Managing Projects

This chapter provides a overview of Collaboration projects and outlines the basic steps required to create and manage projects. This chapter is intended for system administrators who are responsible for creating and maintaining projects in Collaboration. It includes the following sections:

- [Overview of Projects](#)
- [Overview of the Project Explorer](#)
- [Overview of the Project Application View](#)
- [Creating and Managing Projects](#)
- [Providing Access to Projects](#)
- [Working with Project Templates](#)
- [Archiving and Restoring Projects](#)
- [Exporting Projects](#)

## Overview of Projects

Collaboration lets portal users work together by sharing documents, calendars, discussions, and task lists. These elements are combined together to form a Collaboration project, which is the main unit of Collaboration.

Collaboration lets you create multiple projects that are customized to the needs and goals of individual users. After you have set up a series of projects, users can select the projects they need to accomplish their work.

When a user selects a project, Collaboration displays information about that project and makes the project's functional areas available to the user. Functional areas are designed to facilitate teamwork among project members.

Each Collaboration project has its own set of objects and properties that are not shared with other projects. For example, documents added to Project A belong only to that project. Users in Project B have their own set of documents, and do not see those that belong to Project A. Similarly, each project has its own task lists, discussions, messages, and calendar.

## Overview of the Project Explorer

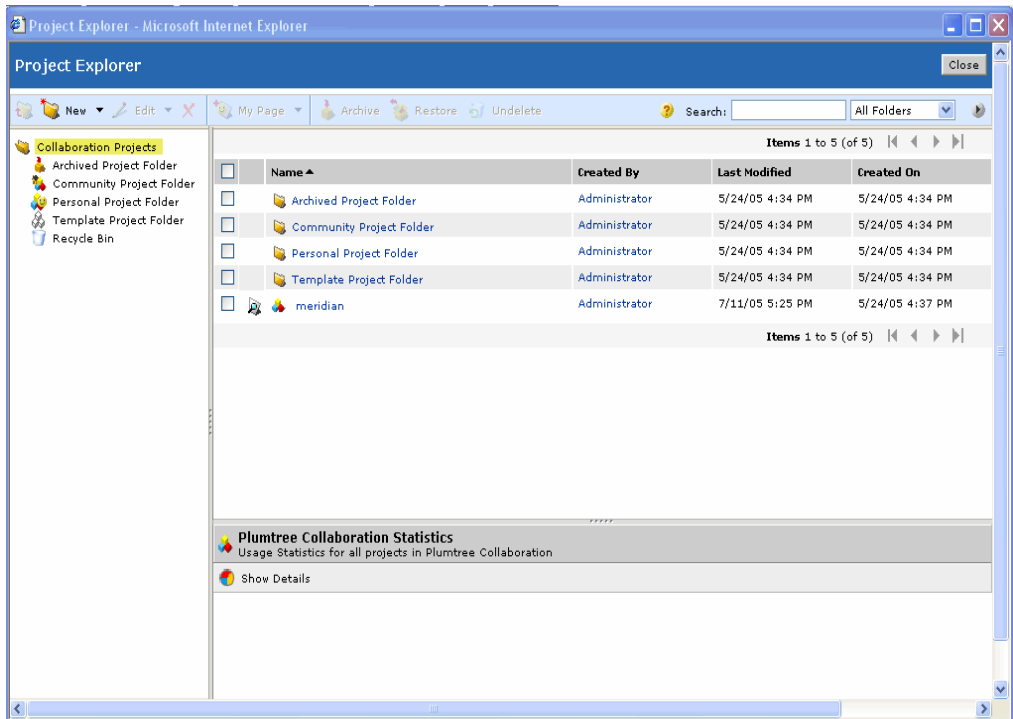
The Project Explorer lets you perform all project management activities in a single window. Based on levels of access, different project functionality is accessible within a universal toolbar. If a user does not have permissions to perform a certain task, that task is unavailable in the toolbar.

The Project Explorer contains the following areas:

**Table 4-1 Project Explorer Areas**

Project Explorer Area	Description
Toolbar	Provides access to all of the Project Explorer functionality
Folder Tree Window	Displays the Project Folder hierarchy within Collaboration
Details Window	Displays information about the selected Project or Project Folder
List Window	Displays the contents of the selected Project Folder

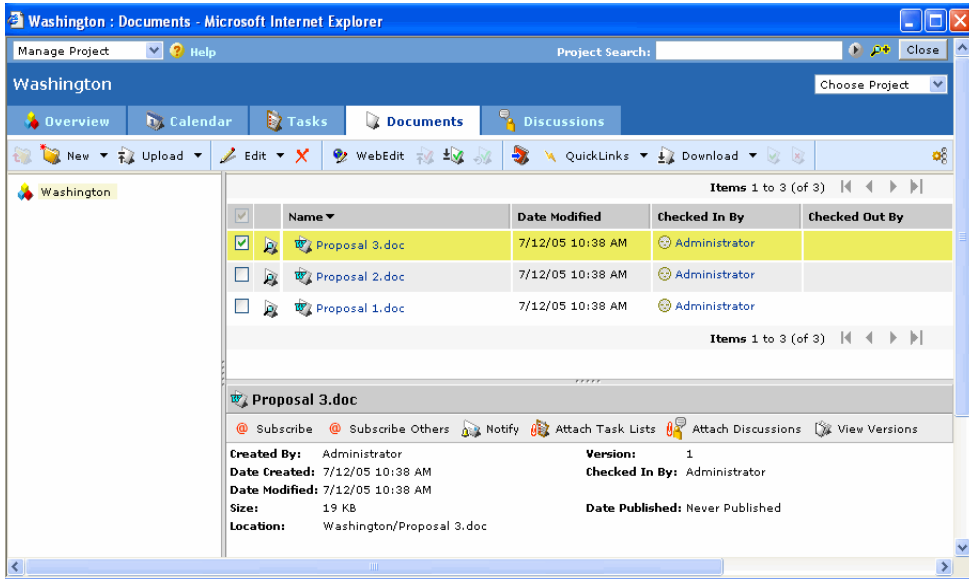
Figure 4-1 Project Explorer



The Project Explorer is accessible from the **My Projects** portlet. Community managers can add this portlet to a community. Users can add this portlet to their My Page.

## Overview of the Project Application View

Figure 4-2 Example of a Project's Application View



The application view can contain the following tabbed panes corresponding to the functional areas of a project:

- Overview
- Calendar
- Tasks
- Documents
- Discussions

Only the functional areas that are included in the project appear in the project's application view. For more information on setting the functional areas of a project see [“Selecting the Functional Areas for a Project”](#) on page 4-6.

# Creating and Managing Projects

This section describes the basic tasks required to create and manage Collaboration projects. It includes the following sections:

- [Creating Projects](#)
- [Setting Up Projects](#)
- [Managing Projects with Project Explorer](#)

## Creating Projects

To create a project, you should perform the following basic tasks:

1. [Creating a New Project](#)
2. [Setting Roles and Permissions](#)
3. [Selecting the Functional Areas for a Project](#)

### Creating a New Project

To create a project, a user must be granted the **Manage Collaboration Projects** activity right. For general information on activity rights, see the *Administrator Guide for BEA AquaLogic Interaction* (Plumtree Foundation). For information on granting Collaboration activity rights, see [“Activity Rights” on page 3-17](#).

To create a new project:

1. Go to the **Project Explorer**.
2. Select **New | Project**.
3. Click **General Settings**.
4. Decide if you want to base your new project on an existing Project Template.

**Note:** After you have created a project, you cannot change the project template.

- If you do not, click **Create empty project**.
- If you do, click **Create template-based project**. Then click **Browse**. Then choose a project template. Then click **Finish**.

5. Enter a name for the project.
6. Choose the default language for the project.

The Search Service uses this information when indexing Collaboration objects.

7. Click **Finish**.

For more information on general project settings, see the *Collaboration Online Help*. For more information on granting and restricting access to a project and other security related topics, see [“Providing Access to Projects” on page 4-10](#).

## Setting Roles and Permissions

After you have created a project, you must determine who has access to it. For information on adding users to a project and setting project security, see [“Providing Access to Projects” on page 4-10](#).

## Selecting the Functional Areas for a Project

Collaboration lets you control which functional areas are included in a project. To choose the functional areas of a project:

1. Go to the **Project Explorer**.
2. Click the check box of the project you want to edit.
3. Select **Edit | Edit Properties**.
4. Click **Functional Areas**.
5. Choose the functional areas you want to include in the project.
6. Click **Finish**.

## Setting Up Projects

After you have created a project and determined who has access to it, you should add content to each of the functional areas. The types of tasks you might need to perform include:

- Adding calendars

- Adding discussions
- Uploading documents

# Managing Projects with Project Explorer

After you have created and set up projects, you can manage them using the Project Explorer. This section describes the tasks you might need to perform to manage projects.

## Editing Project Properties

Once a project has been created, you can edit the following project properties:

Table 4-2 Descriptions of Project Properties

General Setting	Allows you to modify basic project settings.
Roles and Permissions	<p>Allows you to:</p> <ul style="list-style-type: none"><li>• add and delete portal users, groups, and community members to and from the project</li><li>• set default access levels and permissions for the roles: Project Members and Project Guests</li><li>• manually synchronize the project's user information keep it current with the portal database</li></ul> <p>By default, Collaboration synchronizes user information with the portal once a day.</p>
Functional Areas	Allows you to customize what functional areas are used in the project.

To edit project properties:

1. Go to the **Project Explorer**.
2. Click the check box of the project you want to edit.
3. Select **Edit | Edit Properties**.

4. Click **General Settings**.
5. Decide if you want to base your new project on an existing one.
  - If you do not, Choose **Create empty project**.
  - If you do, click **Create template-based project**. Then click **Browse**. Then choose the project template you want to use. Then click **Finish**.
6. Enter a name for the project.
7. Choose the default language for the project.

The Search Service uses this information when indexing Collaboration objects.
8. Click **Finish**.

### Creating Project Folders

Collaboration lets you organize projects in a hierarchical series of folders and subfolders. To create a new project folder:

1. Go to the **Project Explorer**.
2. Select **New | Project Folder**.
3. Enter the name of the new project folder.
4. Click **Finish**.



## Moving Projects to Project Folders

To move a project to a project folder:

1. Go to the **Project Explorer**.
2. Click the check box of the project you want to edit.
3. Select **Edit | Move**.
4. Click **Browse**.
5. Choose a project folder.
6. Click **Finish**.
7. Click **Finish**.

You can use the same procedure to move a project folder to another project folder.

## Deleting Projects and Project Folders

To delete a project or a project folder:

1. Go to the **Project Explorer**.
2. Click the check box of the project that you want to delete.
3. Click **Delete**.
4. Click **OK**.

Collaboration places deleted projects in the Recycle Bin System Folder, which you use to remove and undelete projects that have been deleted.

If you want to disable a project that you might need to access later, you should archive the project instead of delete it. For more information on archiving projects, see [“Archiving and Restoring Projects” on page 4-14](#).

## Removing and Undeleting Projects from the Recycle Bin System Folder

Collaboration stores deleted projects in the Recycle Bin System Folder. This folder lets you remove and undelete projects that have been deleted. Only users with the **Manage Collaboration Projects** activity right can remove or undelete projects from the Recycle Bin System Folder.

Projects that are removed from the Recycle Bin System Folder are permanently removed from the system. Projects that are undeleted from the Recycle Bin System Folder are made available to users.

**Note:** Collaboration contains two types of recycle bins. Project Leaders use the Project Recycle Bin to remove and restore specific *items* that were deleted from projects, rather than specific *projects*.

To remove and restore deleted projects from the Recycle Bin System Folder:

1. Go to the **Project Explorer**.
2. Click the **Recycle Bin** button in the navigation pane of Project Explorer.
3. Choose one or more projects in the table pane.
4. Perform one of the following:
  - Click **Delete**
  - Click **Undelete**

## Providing Access to Projects

This section outlines the procedures required to provide access to a Collaboration project. For general security information about Collaboration see [“Working with Collaboration Security” on page 3-14](#)

### Adding Users to Projects

This section describes the procedures to control who has access to a project. Collaboration lets you assign users to each of the security roles. Each role has its own set of Edit permissions. User types are portal users, groups, and community members.

To allow access to a project:

1. Go to the **Project Explorer**.
2. Click the check box of the project you want to edit.
3. Click **Edit | Edit Properties**.
4. Click **Roles and Permissions**.
5. Determine the security role where you want to add users.

For more information on security roles, see [“Working with Collaboration Security” on page 3-14](#)

6. Click the appropriate button for the type of user you want to add. You can choose one of the following:
  - Add Users
  - Add Groups
  - Add Community Members
7. Choose the users you want to add.
8. Click **OK**.

## Changing Default Permissions for Roles

Collaboration lets you change the default security settings for Project Members and Project Guests.

1. Go to the **Project Explorer**.
2. Click the check box of the project you want to edit.
3. Choose **Edit | Edit Properties**.
4. Click **Roles and Permissions**.
5. Click **Edit Permissions**.
6. Select the desired security settings.

For information on how these settings affect each functional area of the project, see [“Providing Access to Projects” on page 4-10](#).

7. Click **Finish**.

## Removing Users From Projects

To remove a portal user, group, or community member:

1. Go to the **Project Explorer**.
2. Click the check box of the project you want to edit.
3. Choose **Edit | Edit Properties**.
4. Click **Roles and Permissions**.
5. Click **Delete** next to the user, group, or community member you want to remove.
6. Click **OK**.
7. Click **Finish**.

## Working with Project Templates

Project templates lets users create projects that are similar. Project managers and system administrators can use project templates to maintain consistency among the projects used within an organization.

## Creating Project Templates

To create a project template:

1. Go to the **Project Explorer**.
2. Choose the **Template Project Folder**.
3. Choose **New | Project Template**.
4. Click **General Settings**.
5. Decide if you want to base your new project template on an existing one.
  - If you do not, click **Create empty project**.
  - If you do, click **Create template-based project**. Then click **Browse**. Then choose the project template you want to use. Then click **Finish**.
6. Enter a name for the project template.

7. Choose the default language for the project template.

The Search Service uses this information when indexing Collaboration objects.

8. Select the date-shifting method you want to use.

9. Enter the template base day.

For more information on date-shifting methods and template base dates, see [“Setting Project Template Base Dates” on page 4-13](#).

10. Click **Finish**.

## Setting Project Template Base Dates

The dates of tasks, milestones, and events in a project template are not significant on their own; their importance is based on the relative position between the dates in template and the base date.

When a new project is created from a project template, you specify a project start date. When the tasks, milestones, and events from the project template are copied to the new project, their dates are set relative to the project start date. This process is called *date-shifting*.

Collaboration lets you specify the following types of date-shifting when creating a project template:

**Table 4-3 Types of Date Shifting Methods**

Date Shifting Method	Description
Copy dates directly from the project template	This method copies the dates directly from the project template into the new project.
Specify project start day: skip weekends and holidays	This method is used when the number of working days from the start of the project is important.
Specify project start week: preserve day of the week	This method is used when the number of weeks from the start of the project and the day of the week is important.
Specify project start month: preserve working day of the month	This method is used when the number of months from the start of the project and the working day of the month is important.

## Defining Security for Project Templates

You can assign the following access levels to project templates to control who has access to projects created from project templates:

**Table 4-4 Types of Access Levels**

Access Level	Description
Project Leader	Projects created using project templates with this access level are accessible only by Project Leaders.
Project Member	Projects created using project templates with this access level are accessible only by Project Members and Project Leaders.
Project Guest	Projects created using project templates with this access level are accessible to all users.

It is also possible to control access to the project template itself. The Project Leader role can be used to:

- Specify access control on projects created from a project template
- Control access to the project template itself

Users assigned to the Project Leader role have full access to all parts of the project template. Users not assigned to the Project Leader role do not have access to any parts of the project template.

## Archiving and Restoring Projects

A Project Leader or system administrator can archive a project to make it inaccessible to project users. When a project is archived, it cannot be searched and notifications referencing it cannot be sent.

Archiving a project lets you remove inactive or completed projects without losing project data. When a project is archived, it is not removed from the Collaboration database. You can restore projects from the Archived Project folder to make them accessible to users.

Only users with the **Manage Collaboration Projects** activity right can archive projects or restore projects from the Archived Project folder.

## Archiving Projects

To archive a project:

1. Go to the **Project Explorer**.
2. Click the check box of the project you want to archive.
3. Click **Archive**.
4. Click **OK**.

The project is moved to the Archived Project folder.

## Restoring Projects from the Archived Project Folder

To restore a project from the Archived Project folder:

1. Go to the **Project Explorer**.
2. Click the Archived Project folder.
3. Click the checkbox of the project you want to restore.
4. Click **Restore**.
5. Click **OK**.

The project is restored to top level of the Collaboration folder hierarchy.

## Exporting Projects

The Collaboration Resources page lets you choose the projects that you want to export, and whether to export either all of their content (including their metadata) or their metadata only. Metadata includes the project's security information and other data such as the project's name, description, date created, and so on.

After you have configured this page and clicked **Finish**, the system generates .pte and .zip files of the projects. After this process has completed, a dialog box appears that contains a link to the .pte file, which contains portal and Collaboration objects. Click on this link to download the .pte

file to your computer. The .zip file contains only Collaboration objects. You can access the .zip file in: <collab install>/migration/export

To access the Collaboration Resources page:

1. Click **Administration**.
2. From the Select Utility drop-down list, choose **Migration - Export**.
3. Under Resources on the left, click **Collaboration Resources**.

**Note:** You cannot use the ptmigration command line tool to create migration packages that contain Collaboration objects.



# Integrating Collaboration

This chapter describes the features that let you use Collaboration with the Microsoft Windows desktop, back-end groupware server, and Microsoft Project. This helps users work more efficiently by integrating Collaboration into a single work environment. It includes the following sections:

- [Integrating Collaboration and the Desktop](#)
- [Integrating Collaboration and Groupware](#)
- [Integrating Collaboration and Instant Messaging](#)
- [Configuring Microsoft Project Import](#)
- [Configuring E-mail a Project](#)

## Integrating Collaboration and the Desktop

This section describes the configuration and administration of Collaboration features that provide integration with the Microsoft Windows desktop. It includes the following sections:

- [Overview of WebDAV Protocol](#)
- [Configuring Web Folders](#)
- [Configuring WebEdit](#)

## Overview of WebDAV Protocol

Collaboration's desktop integration features require the Web-Based Document Authoring and Versioning (WebDAV) protocol. WebDAV is an extension to the HTTP protocol. During installation, the Collaboration installer lets you install and configure a WebDAV service.

**Note:** If you did not choose to install the WebDAV service during Collaboration installation, you must re-run the installer and choose to install the WebDAV service in order to enable this feature.

## Configuring Web Folders

Collaboration lets users manage Collaboration documents directly from their desktop using Microsoft Windows Explorer. After mapping a Web folder, users can access, edit, and share documents in a Collaboration project or create new Collaboration projects. The Web Folder Settings page in Collaboration Settings lets users select the projects whose documents they want to access with Microsoft Windows Explorer.

Documents opened through Windows Explorer are automatically opened in edit mode and checked out in Collaboration. This helps users work more efficiently by removing the need to check out and download the document. All security and version control operations are performed by Collaboration.

## Adding Activity Rights

To map a Web folder to Collaboration, users must belong to a group that is granted the **Bulk Upload to Collaboration** activity right. This activity right also lets users employ the Bulk Upload feature.

To add this activity right to a group:

1. Click the **Administration** tab.
2. Select the **Activity Manager** utility.
3. Click **Bulk Upload to Collaboration**.
4. Click **Add Group**.
5. Select the groups you want to have this activity right.
6. Click **OK**.
7. Click **Finish**.

For more information on managing activity rights, see the *Administrator Guide for BEA AquaLogic Interaction* (Plumtree Foundation).

## Using IIS with Web Folders

If you are using the Map a Web Folder feature when the portal is running IIS, you must ensure that the Front Page server extensions are disabled on the IIS Web site where the portal is deployed.

1. Choose **Start | Programs | Administrative Tools | Internet Service Manager**.
2. Right-click on the Web site used by the portal.
3. Select **Properties**.
4. Select the **Server Extensions** tab.

If you receive a message stating that the server has not been configured to use server extensions, then IIS is configured correctly.

If the **Enable authoring** checkbox exists, ensure that it is not checked.

## Making the Collaboration Office Tools Add-In Installer Available to End Users

The Collaboration Office Tools Add-In lets end users choose from several check-in options and type additional check-in comments. The Add-In dialog appears after users edit and close a document either from WebEdit or within the Web folder on their personal computer.

The Collaboration Office Tools Add-In must be installed on the machine of each user who may want to use the Add-In. WebEdit, however, still functions correctly without the installation of the Add-In. You can either push out the Add-In's installer to your users or have them download it.

To push out the installer to end users, use the .msi file appropriate to your language:

- ALICollaborationOfficeTools.msi (English and other European languages)
- ALICollaborationOfficeTools\_ja (Japanese)
- ALICollaborationOfficeTools\_ko (Korean)
- ALICollaborationOfficeTools\_zh (Chinese)

- ALICollaborationOfficeTools\_zh-tw (Traditional Chinese)

All .msi files are located in:

```
<ImageService>/plumtree/collab/private/applets
```

To make the installer available to be downloaded by end users, set the **docman.webEdit.installOfficeTool-sPopUp.enabled** parameter in **config.xml** to **yes**.

The installer, **ALICollaborationOfficeTools.exe**, is located in:

```
<ImageService>/plumtree/collab/private/applets
```

## Mapping Web Folders

This section describes how to map a Web folder. You should test these procedures before rolling out a production version of Collaboration.

**Note:** Mapped Web folders should not contain Windows folders whose names include the # or : characters. Windows folder names that include these characters appear incorrectly within Collaboration projects.

**Note:** When you move a Windows folder within a project subfolder, a Windows dialog prompts you to confirm whether you want to *delete* the folder. Click Yes. The folder is moved to the desired location, even though a message appears that Windows is unable to delete the folder. This is expected Windows behavior.

To map a Web folder in Windows 2000:

1. Copy the URL in the **Web Folder Location** box.
2. Open **My Network Places** on your desktop.
3. Double-click **Add Network Place**. The Add Network Place Wizard appears.
4. In the **Type the location of the Network Place** box, paste the URL, then click **Next**.
5. If prompted, enter your name and password, then click **OK**.
6. In the **Enter a name for this Network Place** box, type a name, then click **Finish**.

A new network place is created and Collaboration is mapped on Windows Explorer.

To map a Web folder in Windows XP:

1. Copy the URL in the **Web Folder Location** box.
  2. Open **My Network Places** on your desktop.
  3. Double-click **Add Network Place**. The Add Network Place Wizard appears.
  4. Click **Next**.
  5. Select **Choose another network location**.
  6. In the **Internet or network address** box, paste the URL, then click **Next**.
  7. If prompted, enter your name and password, then click **OK**.
  8. In the **Type a name for this network place** box, type a name, then click **Finish**.
- A new network place is created and Collaboration is mapped on Windows Explorer.

To map a Web folder in Windows 2003:

1. Copy the URL in the **Web Folder Location** box.
  2. Open **My Network Places** on your desktop.
  3. Double-click **Add Network Place**. The Add Network Place Wizard appears.
  4. Click **Next**.
  5. Select **Choose another network location**.
  6. In the **Internet or network address** box, paste the URL, then click **Next**.
  7. If prompted, enter your name and password, then click **Next**.
  8. In the **Type a name for this network place** box, type a name, then click **Next**.
  9. Click **Finish**.
- A new network place is created and Collaboration is mapped on Windows Explorer.

## Working with Web Folder Configuration File Settings

This section explains the configuration file settings for the Web Folder feature.

**Table 5-1** config.xml Nodes for Web Folder Feature

Node	Description
fullWebDAVAccessToThisServer	Enables or disables the use of WebDAV. Valid values are: <b>yes</b> : Causes Collaboration to accept WebDAV requests. This is the default. <b>no</b> : Causes Collaboration to reject WebDAV requests.
requestsAreGatewayed	Enables or disables WebDAV communication between Windows Explorer and Collaboration. Valid values are <b>true</b> and <b>false</b> .
uiDisplaysServerConfigInfo	Controls how Collaboration displays the <b>New   Web Folder</b> dialog in the <b>Documents</b> tab. Valid values are: <b>yes</b> : Displays the Web Folder dialog box. This is the default. <b>no</b> : Does not display the Web Folder dialog box.

**Table 5-1 config.xml Nodes for Web Folder Feature**

Node	Description
useNonGatewayedURL	<p>Determines whether the Web Folder dialog box displays instructions for mapping a gatewayed network drive.</p> <p>Valid values are:</p> <p><b>no:</b> Cause the Web Folder dialog to display information for mapping between Windows Explorer and Collaboration through the gateway. This is the default.</p> <p><b>yes:</b> Causes the Web Folder dialog to display information for mapping directly between Windows Explorer and Collaboration.</p> <p><b>Note:</b> If the connection between Windows Explorer and Collaboration is gatewayed, this instance of Collaboration continues to function as the WebDAV service. Therefore, this instance of config.xml must have <b>fullWebDAVAccessToThisServer.enabled</b> set to <b>true</b> and <b>fullWebDAVAccessToThisServer.requestsAreGatewayed</b> set to <b>true</b>.</p>
serverURL	<p>Provides the base URL to Collaboration that acts as the WebDAV service if Collaboration is configured to communicate directly with Windows Explorer.</p>

Following is an example of the Web Folder section of config.xml:

```
<webDAV>

  <fullWebDAVAccessToThisServer enabled="yes">

    <requestsAreGatewayed>false</requestsAreGatewayed>

  </fullWebDAVAccessToThisServer>

  <uiDisplaysServerConfigInfo enabled="yes">

    <useNonGatewayedURL enabled="yes">

      <serverURL>http://server.yourco.com:8080/collabserver</serverURL>

    </useNonGatewayedURL>

  </uiDisplaysServerConfigInfo>

</webDAV>
```

## Configuring WebEdit

WebEdit lets Collaboration users directly edit Microsoft Office documents on their desktop. Users can edit a document directly without having to explicitly check-out and download the document to their machine. Collaboration handles the process of checkouts and security.

Users must be running Microsoft Internet Explorer 5.0 or later. The following types of documents are supported by WebEdit:

- Microsoft Word
- Microsoft Excel
- Microsoft Office

## Using IIS with WebEdit

If you are using the WebEdit feature when the portal is running IIS, you must ensure the Front Page server extensions are disabled on the IIS Web site where the portal is deployed.

1. Choose **Start | Programs | Administrative Tools | Internet Service Manager**.



2. Right-click on the Web site used by the portal.
3. Select **Properties**.
4. Select the **Server Extensions** tab.

If you receive a message stating that the server has not been configured to use server extensions, then IIS is configured correctly.

If the **Enable authoring** checkbox exists, ensure that it is not checked.

## Working with WebEdit Configuration File Settings

This section explains the configuration file settings for the WebEdit feature.

### config.xml

The following nodes and attributes are located in **config.xml**.

**Table 5-2 config.xml Nodes for WebEdit Feature**

Node or Attribute	Description
webEdit	Enables or disables WebEdit. Valid values are <b>yes</b> and <b>no</b> .
nonGatewayedAccess	<p>Determines if HTTP communication between Microsoft Office and Collaboration is gatewayed through the portal. Valid values are:</p> <p><b>yes:</b> HTTP communication is gatewayed through the portal. This is the default.</p> <p><b>no:</b> HTTP communication is not gatewayed through the portal.</p>
serverURL	<p>The base URL Microsoft Word uses to communicate with Collaboration. This attribute is used if enable is set to <b>true</b>.</p> <p><b>Example:</b> http://collab.myco.com:8080/collabserver</p>

**Table 5-2 config.xml Nodes for WebEdit Feature**

Node or Attribute	Description
tokenBasedAuthentication	<p>Determines if token-based authentication is used. In a normal Collaboration implementation, there is no need to change these values. Valid values are:</p> <p><b>true:</b> Enables token-based authentication. This is the default.</p> <p><b>false:</b> Disables token-based authentication. This setting can only be used when HTTP communication is gatewayed and some other authentication method is being used.</p>
useClustering	<p>Controls the use of message clustering with token-based authentication. Valid values are:</p> <p><b>yes:</b> Enables message clustering. This is the default.</p> <p><b>no:</b> Disables message clustering. This setting should only be used when message clustering is not required and would degrade performance.</p> <p><b>Note:</b> This setting has no effect if general clustering functionality has been disabled for Collaboration. Therefore we recommend that you enable <b>useClustering</b> at all times.</p>
maxWaitSeconds	<p>Determines how long Collaboration waits for a response from other servers in the cluster. This setting is applicable only if token-based authentication and message clustering are enabled.</p> <p><b>Default:</b> 30</p>
truncateFileNames	<p>The number of characters that are allowed in the file name displayed in WebDAV before the characters are truncated.</p>
clsid	<p>Specifies the class ID of the COM object.</p> <p><b>Note:</b> This value should not be modified.</p>

**Table 5-2 config.xml Nodes for WebEdit Feature**

Node or Attribute	Description
fileSpec	Specifies the name of the distribution file and information about the component.  <b>Note:</b> This value should not be modified unless a more recent version of the object needs to be deployed.
installOfficeToolsPopUp enabled	Enables or disables the Collaboration Office Tools Add-In installer. Valid values are <b>yes</b> and <b>no</b> .

Following is an example of the WebEdit section of **config.xml**:

```
<webEdit enabled="yes">
  <nonGatewayedAccess enabled="no">
    <serverURL>@WEB_EDIT_COLLAB_SERVER_BASE_URL@</serverURL>
  </nonGatewayedAccess>
  <tokenBasedAuthentication enabled="true">
    <useClustering enabled="yes">
      <MaxWaitSeconds>30</maxWaitSeconds>
    </useClustering>
  </tokenBasedAuthentication>
  <truncateFileNames>75</truncateFileNames>
  <clientControl>
    <clsid>68473829-414C-A45B-ABEE249E704A</clsid>
    <fileSpec>PTCollabWebEditControl.CAB#version=1,0,0,0</fileSpec>
  </clientControl>
</installOfficeToolsPopUp enabled="yes" />
</webEdit>
```

## filetypes.xml

The following configuration nodes and attributes are located in **filetypes.xml**:

**Table 5-3 filetypes.xml Nodes**

Node or Attribute	Description
webEdit	Specifies whether this type of file is WebEditable. Unless serious modifications are made to the code, only Microsoft Office applications are WebEditable. Valid values are <b>yes</b> and <b>no</b> .
appCode	Represents the application that opens the document in a WebEdit session. Valid values are: <ul style="list-style-type: none"> <li>• <b>1</b> (for Microsoft Word)</li> <li>• <b>2</b> (for Microsoft Excel)</li> <li>• <b>3</b> (for Microsoft PowerPoint)</li> </ul>

Following is an example of the WebEdit section of **filetypes.xml**:

```
<webEdit enabled="yes">
  <appCode>1</appCode>
</webEdit>
```

## Integrating Collaboration and Groupware

Collaboration lets you integrate back-end groupware servers. The Groupware Integration feature lets users:

- Access items on a groupware calendar using the My Calendar portlet
- Create appointments and meeting requests
- Synchronize a Collaboration calendar with a groupware calendar

**Note:** Groupware Integration is not necessary for users employ the E-mail a Project feature. For more information about the E-mail a Project feature, see [“Configuring E-mail a Project” on page 5-21](#). Additionally, the Notification Service -- which is used to generate and send e-mail notifications from projects to users -- is not required to employ Groupware Integration capabilities (however, if the Notification Service is not running the E-mail a Project feature is less useful).

Back-end groupware connections are configured by Collaboration administrators. If no groupware server is configured, no Groupware Integration functionality is available to end users.

The following groupware servers are supported:

- Microsoft Exchange 2000 SP3 and above
- Microsoft Exchange 2003
- Lotus Domino 5.0.11

## Performing Basic Groupware Integration Tasks

This section describes the basic configuration required for enabling groupware integration. You must:

- Edit config.xml

**Note:** After initial product installation, you should disable groupware integration in config.xml if you are going to wait to configure your back-end servers. This prevents the integration-related graphical user interface elements from appearing to end users.

You must configure the following fields in config.xml to enable groupware integration:

- groupware.enabled
- groupware.type
- groupware.soapServerURL

**Note:** groupware.soapServerURL is applicable only to Microsoft Exchange.

For more information on these fields and config.xml, see [“Working With Auto-Synchronization” on page 5-15](#). If you chose to integrate groupware during installation, these fields were configured by the Collaboration installer.

- Configure a groupware server
  - a. Log in to the portal.
  - b. Click the **Administration** tab.
  - c. Select the **Collaboration Administration** utility.
  - d. Click **Groupware Servers**.
  - e. Click **Add Server**.

f. Enter the configuration information

If you are using Microsoft Exchange, enter the following:

**Table 5-4 Collaboration Administration Microsoft Exchange Integration Values**

Node or Attribute	Description
Server Name/IP/URL	<p>The server name, IP address, or URL of the groupware server.</p> <p><b>Note:</b> If you are upgrading Collaboration, you should use the value of the <b>serverURL</b> element in the 3.x version of the configuration file and add the http:// protocol prefix.</p> <p><b>Example:</b> http://mail.company.com/exchange</p>
Alias	An optional descriptive name for this groupware server.

If you are using Lotus Domino, enter the following:

**Table 5-5 Collaboration Administration Lotus Domino Integration Values**

Node or Attribute	Description
Server Name/IP/URL	<p>The server name, IP address, or URL of the groupware server.</p> <p><b>Example:</b> http://mail.company.com/notes</p>
Alias	<p>An optional descriptive name for this groupware server, which will be available to end users.</p> <p><b>Example:</b> MyCompany Notes Server</p>
Server Port	If your server port number is other than 80, type a port number; otherwise leave this blank.
Proxy Host/Firewall Port	If you are using a proxy server or a firewall, type the host name; otherwise leave this blank.
Use SSL	If you are using https, select the check box.
HTTPS Port	If you are using an https port number other than 443, type the port number; otherwise leave this blank.
Session Based Authentication	If you are using form-based authentication (cookies), select this; if you are using basic authentication, clear the check box.

**Table 5-5 Collaboration Administration Lotus Domino Integration Values**

Notes Server Temp Dir	Type the local directory of the Lotus Domino server that temporarily stores new attachment files.  <b>Example:</b> C:\Temp
Notes Server Temp UNC	Type the UNC path of the directory of the Lotus Domino server that stores the attachments. This should be the same directory as in the Notes Server Temp Dir. For example: \\<Lotus Domino server name>\<folder name>.

- User account setup

In order to use groupware integration, each user must perform the following steps to configure their account:

- Log-in to the portal.
- Click **My Account**.
- Click **Collaboration Settings**.
- Click **Calendar Synchronization**.
- Enter the required account information.
- Click **Finish**.

## Working With Auto-Synchronization

Collaboration can perform automatic synchronization between groupware and Collaboration calendars for individual users. When groupware appointments are imported or calendar items are exported, Collaboration creates a link between them and updates the entries on the groupware server if they are different from the Collaboration calendar entries.

Users can manually synchronize the groupware and calendar entries using the **Synchronize** button on the calendar toolbar. Collaboration administrators can also enable automatic synchronization by setting the **calendarAutoSynch** element to **yes**. After this feature is enabled, users can specify which calendar items are auto-synchronized from the My Account page.

When automatic synchronization is enabled, Collaboration runs a nightly process to update the specified entries for each user.

**Note:** For Microsoft Exchange, the speed at which users' free/busy information is updated to the groupware server and made available to the Collaboration calendars is dependent on the interval that the user sets in their Microsoft Exchange calendar's free/busy options.

## Limiting Attachment Size

Collaboration administrators can set a size limit on the attachments each appointment or meeting request can have. This limit applies to the total size of all attachments, not individual attachments. When the total size of the attachments exceeds the size limit, a warning is displayed and the upload process is canceled.

## Working with Configuration File Settings for Groupware Integration

This section describes the configuration file settings for groupware integration contained in **config.xml**.

**Table 5-6 config.xml Nodes for Groupware Integration**

Node or Attribute	Description
groupware	This node is used to configure groupware integration. Valid values are:  <b>yes:</b> Enables groupware integration.  <b>no:</b> Disables groupware integration. If this setting is used, all other settings in this section are ignored.
type	Indicates the type of back-end server used. Valid values are:  <b>notes:</b> Enables the Lotus Domino groupware server.  <b>exchange:</b> Enables Microsoft Exchange groupware server.
soapServerURL	Specifies the SOAP server URL specified during Collaboration installation.



**Table 5-6 config.xml Nodes for Groupware Integration**

Node or Attribute	Description
timeoutInMilliSecond	<p>Specifies the amount of time, in milliseconds, that Collaboration waits for responses from the SOAP server. If the SOAP server does not respond in this amount of time, the current operation is aborted and an exception is returned.</p> <p><b>Note:</b> Due to the performance constraints and the fact that large attachments might be transferred between Collaboration via Exchange, the attribute should be set to a value greater than 10000 (10 seconds).</p>
calendarCachePeriod	Specifies the cache time-out period, in seconds, for groupware items on the My Calendar portlet. When the My Calendar portlet is refreshed, Collaboration checks if the current items have timed out. If they have, Collaboration retrieves the entries from the back-end server. Otherwise, the entries are retrieved from memory.
addressBookReturn	The maximum number of returned addresses from the address search operation.
maxAttachmentSizeinKB	<p>The maximum attachment file size, in kilobytes, that a meeting request or appointment can contain.</p> <p><b>Note:</b> This limit is the total file size of all attachments an item can have.</p>
calendarAutoSynch	<p>The following values are supported:</p> <p><b>yes:</b> Enables automatic synchronization between a user's project calendar and their Exchange or Notes calendar.</p> <p><b>no:</b> Disables automatic synchronization between a user's project calendar and their Exchange or Notes calendar.</p>
month.Range	The range of months auto-synchronization covers, starting from the current month.
email	This node is used to configure settings to let users send an e-mail directly to a project from their groupware.

Following is an example of the groupware integration section of **config.xml**:

```
<groupware enabled="yes" type="exchange">
  <soapServerURL timeoutInMiliSecond="10000">http://server.
mycompany.com/GroupwareService/GroupwareService.asmx</soapServerURL>
  <calendarCachePeriod>600</calendarCachePeriod>
  <addressBookReturn>50</addressBookReturn>
  <maxAttachmentSizeinKB>2048</maxAttachmentSizeinKB>
  <calendarAutoSynch enabled="yes">
    <monthRange>2</monthRange>
```

## Integrating Collaboration and Instant Messaging

To integrate Yahoo! Instant Messaging with Collaboration, you need to:

- Configure the instant-messaging section of config.xml.
- Provide each user who wants to employ instant messaging functionality with the **Ability to View Instant Messaging Presence** activity right.

This section describes the configuration file settings for instant messaging integration in config.xml.

**Table 5-7 config.xml Nodes for Instant Messaging Integration**

Node or Attribute	Description
instant-messaging enabled	This node is used to enable instant messaging.
presence-url	This node returns an image to indicate whether the user is online or not.
send-url	This node includes the URL from which messages are sent. The <i>\$user</i> variable includes the e-mail address of the individual user.
contact-url	This node includes the URL at which messages can be received. The <i>\$user</i> variable includes the e-mail address of the individual user.
presence-poll-interval	This node includes the number of seconds between presence polls.

## Setting Up the IM Handle Property

If your users are required to have an IM handle value that is different than their e-mail address, follow this procedure to create the IM Handle property and add the property to the portal's General Information page for each user profile. After you have added this property, you can add each user's IM handle to their user profile; you can also have each user perform this task on their own.

1. Log in to the portal as the Administrator.
2. Navigate to **Administration | Administrative Resources Folder**. Then, from the Create Object drop-down list, choose **Property**.
3. On the Main Settings page, leave the default values and selections.
4. Click **Finish**.  
The Save Object dialog box appears.
5. Make sure that the Administrative Resources folder is selected and name the object *IM Handle*.
6. Click **Save**.
7. Click **Close**.  
You are returned to the Administrative Resources folder.
8. From the Select Utility drop-down list, choose **Global Object Property Map**.
9. On the Main Page, click **Edit** for the User object.
10. In the Choose Property dialog box, select the **IM Handle** property, then click **OK**.  
You are returned to the Main Page.
11. Click **Finish**.
12. From the Select Utility drop-down list, choose **User Profile Manager**.
13. Under Edit Object Settings, click the **User Information - Property Map** link.
14. If the IMUser user information attribute is assigned to the Email Address property, perform the following in sequence:
  - Click **Edit** for the property
  - Delete *IMUser*, along with the comma that precedes it

Do not delete any other user information attributes that are assigned to the Email Address property.

- Click **Edit** for the Email Address property to return it to a non-editable state

15. Click **Add**.

16. In the Choose Property dialog box, select the IM Handle property, then click **OK**.  
You are returned to the **User Information - Property Map** page.

17. Click **Edit** for the IM Handle property.

18. Delete *IMHandle*, then replace it with *IMUser*.

19. Click **Edit** for the IM Handle property to return it to a non-editable state.

20. Click **Finish**.

21. Navigate to **Administration | Portal Resources Folder**.

22. Click the **Portlet** link.

23. Click the **General Information** portlet link.

24. In the Edit Portlet: General Information page, click **Edit**.  
The User Profile Portlet Configuration dialog box appears.

25. Click **Add Property**.

26. Select the **IM Handle** property name, then click **OK**.  
You are returned to the User Profile Portlet Configuration dialog box.

27. Click **Finish**.  
You are returned to the Edit Portlet: General Information page.

28. Click **Finish**.  
You are returned to the Portal Resources Folder. The IM Handle property is added to the portal's user profile, General Information page.

## Configuring Microsoft Project Import

The following configuration parameters can be set to customize Microsoft Project imports:

**Table 5-8 Configuration Parameters for Customizing Microsoft Project Imports**

Node or Attribute	Description
project-import	Contains parameters that are specific to Microsoft Project import.
number-of-tasks-limit	The total number of tasks allowed in an import. The default is 1000.

## Configuring E-mail a Project

This section describes how to configure the E-mail a Project feature. The E-mail a Project feature lets users:

- E-mail a message to a discussion within a project
- E-mail a document to a folder within a project
- Reply to a message post notification

This section discusses the following:

- [Performing a Basic Configuration](#)
- [Example: Relaying E-mail to Collaboration](#)

The “Relaying E-mail to Collaboration” section provides an example of configuring sendmail on a Linux machine that is also running Collaboration. You can use this example as a guideline for configuring your mail host if it is running on the same machine as Collaboration.

**Note:** Groupware Integration is not necessary for users to employ the E-mail a Project feature. Groupware Integration is only necessary if users want to employ the capabilities that are described in “[Integrating Collaboration and Groupware](#)” on page 5-12. Additionally, the Notification Service -- which is used to generate and send e-mail notifications from projects to users -- is not required to employ the E-mail a Project feature. However the E-mail a Project feature is less useful if the Notification Service is not running.

## Performing a Basic Configuration

This section discusses how to configure E-mail a Project if you are running your mail host and Collaboration on separate machines.

To configure Collaboration to use the E-mail a Project feature:

- An IT or network operations employee at your organization needs to add a DNS MX (mail exchange) record that points to Collaboration
- The users' e-mail address must be registered in their portal user profile  
 Either the administrator or user can perform this task. The e-mail address in the portal user profile must exactly match the user's e-mail address; this is case-sensitive.
- Optional: If you do not want to use the default values, you can configure the following nodes in the email section of config.xml:

**Table 5-9 config.xml Nodes for E-mail a Project Configuration**

Node	Description
domain	The e-mail domain. For example: <i>mail.buttercut.plumimap.com</i> Most likely, you configured this node when you ran the Collaboration Installer.
connection-pool	The number of socket handlers for incoming connections. The default value is 10.
mail-processors	The number of threads devoted to processing incoming e-mails. The default value is 5.
maximum-message-size	The maximum size of incoming e-mails. -1 indicates that Collaboration does not perform size checks. When this is the case, the Collaboration API enforces size limits for message bodies and files. The default value is -1.
authorized-connections	The names or IP addresses of hosts, in a comma-delimited format, that are allowed to connect to the SMTP handler. We recommend creating this list of names to enforce security. See the config.xml file for an example of this list. The default value is *, which indicates no limit.
idle-timeout	The time (in minutes) that an incoming connection can remain idle. The default value is 20.

Following is an example of the email section in config.xml:

```
- <email enabled="@EMAIL_ENABLED@" port="25">
<domain>@EMAIL_DOMAIN@</domain>
<connection-pool>10</connection-pool>
<mail-processors>5</mail-processors>
<maximum-message-size>-1</maximum-message-size>
    <authorized-connections>*</authorized-connections>
<idle-timeout>20</idle-timeout>
```

## Example: Relaying E-mail to Collaboration

If you are running your e-mail host on the same machine as Collaboration, you need to configure your e-mail host to relay e-mail to Collaboration. This section provides an example of configuring sendmail to relay e-mail to Collaboration, which you can use as a guideline for configuring your own e-mail host.

In this example, Collaboration uses port 2525 (by default, Collaboration uses port 25, which is the same port that sendmail uses. For this reason, Collaboration's port must be changed.)

**Note:** The steps that are required for you to set up your e-mail host to relay mail to Collaboration may differ than the example, depending on your production environment.

## Prerequisites

These prerequisites provide an example of the tasks that should be completed before configuring sendmail.

1. The sendmail-cf rpm package must be installed. To determine if it is installed, run the following as root:

```
rpm -qa | grep sendmail
```

The return should appear as follows:

```
sendmail-8.12.11-4.RHEL3.1
sendmail-cf-8.12.11-4.RHEL3.1
```

2. Create a subzone/subdomain under your current domain. For example, collabmail.yourcompany.com.

3. Create a host entry that points to your Collaboration server.

```
MX      10      mail.collabmail.yourcompany.com
```

4. Create a MX (mail exchange) record so that anything that gets sent to `*@collabmail.yourcompany.com` goes to the host record that you just created:

```
MX      10      mail.collabmail.yourcompany.com
```

The value 10 in the above example represents the priority that allows you to have more MX records. It assures that e-mails go to the higher priority first.

**Note:** An alternative to Step 2 (above) is to specify `mx 10 X.X.X.X` under your subzone.

## Configuring Sendmail

These instructions provide an example for configuring sendmail to relay incoming mail to Collaboration:

1. Log in as root.
2. Stop the sendmail processes:

```
/etc/rc.d/init.d/kudzu stop
/etc/rc.d/init.d/sendmail stop
/etc/rc.d/init.d/apmd stop
```
3. Verify file “relay-domains” is in `etc/mail`.

- a. Add your domain:

```
[machine].[yourimap].com
```

For example, `collab-x5.plumimap.com`.

4. Edit the `etc/mail/access` file.
  - a. Add the following to the **access** file:

```
To: [machine].[yourimap].com      RELAY
```

```
To: collab-x5.plumimap.com        RELAY
```

- b. From your terminal, rehash to update the **access.db** file:

```
/usr/sbin/makemap hash /etc/mail/access.db < /etc/mail/access
```

5. Edit the **sendmail.mc** file to relay e-mails to Collaboration using a different port.



```
/etc/mail/sendmail.mc
```

- a. Add the following before the MAILER lines at end of the file:

```
FEATURE(`mailertable')
define(`confRELAY_MAILER', `esmtplib')
define(`RELAY_MAILER_ARGS', `TCP $h 2525')
```

- b. Look for the following line in the file:

```
DAEMON_OPTIONS(`Port=smtp,Addr=127.0.0.1, Name=MTA')dnl
```

Comment the above line out so that it appears as follows:

```
dnl DAEMON_OPTIONS(`Port=smtp,Addr=127.0.0.1, Name=MTA')dnl
```

- c. In your terminal, type the following:

```
m4 /etc/mail/sendmail.mc > /etc/mail/sendmail.cf
```

6. Edit the **mailertable** file as follows.

```
/etc/mail/mailertable
```

- a. Add the following to the **mailertable** file:

```
[machine].[yourimap].com    relay:mail.[machine].[yourimap].com
```

For example:

```
Collab-x5.plumimap.com    relay:mail.[machine].plumimap.com
```

- b. Then rehash to update the **mailertable.db** file by typing the following in your terminal:

```
/usr/sbin/makemap hash /etc/mail/mailertable.db <
/etc/mail/mailertable
```

7. Start sendmail as follows:

```
/etc/rc.d/init.d/apmd start
/etc/rc.d/init.d/sendmail start
/etc/rc.d/init.d/kudzu start
```

8. Edit the Collaboration **config.xml** file to enable e-mail and to use port 2525:

```
email enabled="yes" port="2525"
```

9. Restart Collaboration.

The **collaboration.log** file should show the E-mail Service has started on port 2525 with no errors.

10. A Telnet to the machine port should return something similar to the following:

```
220 Collaboration 4.1 Build:198844.20050824 0720.0 SMTP Server (Messaging
Server ) ready Wed, 24 Aug 2005 14:50:36 -0700 (PDT)
```

## Working With Collaboration E-mail Errors

If an error occurs when a user sends an e-mail to a Collaboration project:

- Collaboration rejects the e-mail and does not reply with an error notification if it cannot verify:
  - The identification of the user who sent the e-mail
  - The format of the e-mail address
- Collaboration replies with an error notification if it is able to verify:
  - The identification of the user who sent the e-mail
  - The format of the e-mail address

If Collaboration is down, the mail server queues the e-mail and attempts redelivery a few times before quitting. Collaboration sends an error e-mail to the user who sent the e-mail, then redelivers the e-mail when Collaboration is back up.

# Working with Configuration Files

This appendix contains a detailed description for each of the Collaboration configuration files that you can edit to customize your installation. It includes the following sections:

- [Overview of Collaboration and Notification Service Configuration Files](#)
- [config.xml](#)
- [documentTemplates.xml](#)
- [filetypes.xml](#)
- [database.xml](#)

## Overview of Collaboration and Notification Service Configuration Files

This section provides overviews of Collaboration and Notification Service configuration files. The following table provides a general overview of the Collaboration configuration files.

**Table A-1 Collaboration Configuration Files**

Collaboration Configuration File	Description
config.xml	The main configuration file for Collaboration. This file allows you to configure various advanced Collaboration settings, including connection information to other components that Collaboration uses (such as search and notification) and advanced settings for features such as bulk upload and WebDAV. By default, it is installed in <PT_HOME>\ptcollab\4.1\settings\config, where <PT_HOME> is, by default, C:\Program Files\plumtree\ . For more information, see <a href="#">“config.xml” on page A-4</a>
documentTemplates.xml	Sets the document templates that are recognized by Collaboration. By default, it is installed in <PT_HOME>\ptcollab\4.1\settings\config, where <PT_HOME> is, by default, C:\Program Files\plumtree\ . For more information, see <a href="#">“documentTemplates.xml” on page A-14</a>
filetypes.xml	Lists file types in Collaboration. By default, it is installed in <PT_HOME>\ptcollab\4.1\settings\config, where <PT_HOME> is, by default, C:\Program Files\plumtree\ . For more information, see <a href="#">“filetypes.xml” on page A-15</a>
database.xml	Configures Collaboration database settings. The configuration file is automatically updated during the installation of Collaboration. By default, it is installed in <PT_HOME>\ptcollab\4.1\settings\config, where <PT_HOME> is, by default, C:\Program Files\plumtree\ . For more information, see <a href="#">“database.xml” on page A-18</a>
dr.xml	Configures the connection to the Document Repository Service. By default, it is installed in <PT_HOME>\ptcollab\4.1\settings\config, where <PT_HOME> is, by default, C:\Program Files\plumtree\ .  <b>Note:</b> Dr.xml is automatically updated during the installation of Collaboration. Do not modify this file.

**Table A-1 Collaboration Configuration Files**

<b>Collaboration Configuration File</b>	<b>Description</b>
audit.xml	<p>Controls the logging and profiling functionality of Collaboration. By default, it is installed in &lt;PT_HOME&gt;\ptcollab\4.1\settings\config, where &lt;PT_HOME&gt; is, by default, C:\Program Files\plumtree\.</p> <p><b>Note:</b> The contents of this file are generated by Collaboration. They should not be modified.</p>
cache.xml	<p>Manages Collaboration caches. By default, it is installed in &lt;PT_HOME&gt;\ptcollab\4.1\settings\config, where &lt;PT_HOME&gt; is, by default, C:\Program Files\plumtree\.</p> <p><b>Note:</b> The contents of this file are generated by Collaboration. They should not be modified.</p>
cluster.xml	<p>Configures settings for Collaboration that is set up in a clustered network environment. By default, it is installed in &lt;PT_HOME&gt;\ptcollab\4.1\settings\config, where &lt;PT_HOME&gt; is, by default, C:\Program Files\plumtree\.</p>
application.xml	<p>Configures Web application deployment settings, such as http and https ports, for Collaboration. By default, it is installed in &lt;PT_HOME&gt;\ptcollab\4.1\settings\config, where &lt;PT_HOME&gt; is, by default, C:\Program Files\plumtree\.</p>
object-migration.xml	<p>Controls object migration in Collaboration. By default, it is installed in &lt;PT_HOME&gt;\ptcollab\4.1\settings\config, where &lt;PT_HOME&gt; is, by default, C:\Program Files\plumtree\.</p> <p><b>Note:</b> The contents of this file are generated by Collaboration. They should not be modified.</p>

**Note:** You create holidays by using the Holidays page in the Collaboration Administration Utility. If you used a pre-4.1 version of Collaboration, you can refer to the holidays.xml configuration file when creating holidays. This configuration file is disabled and only exists for your reference.

For information on creating, editing and deleting holidays, see [“Creating, Editing and Deleting Holidays” on page 3-6](#)

The following table provides a general overview of the Notification Service configuration files.

**Table A-2 Notification Service Configuration Files**

Notification Service Configuration File	Description
config.xml	The main Notification Service configuration file. This file lets you configure various Notification Service settings. By default, it is installed in <PT_HOME>\ptnotification\4.1\settings\config, where <PT_HOME> is, by default, C:\Program Files\plumtree\.
database.xml	Lets you configure Notification Service database settings. By default, it is installed in <PT_HOME>\ptnotification\4.1\settings\config, where <PT_HOME> is, by default, C:\Program Files\plumtree\.
audit.xml	Controls the logging and profiling functionality of the Notification Service. By default, it is installed in <PT_HOME>\ptnotification\4.1\settings\config, where <PT_HOME> is, by default, C:\Program Files\plumtree\.  <b>Note:</b> The contents of this file are generated by Collaboration. They should not be modified.
cache.xml	Manages Notification Service caches. By default, it is installed in <PT_HOME>\ptnotification\4.1\settings\config, where <PT_HOME> is, by default, C:\Program Files\plumtree\.  <b>Note:</b> The contents of this file are generated by the Notification Service. They should not be modified.

## config.xml

The following table provides a detailed description of the configuration parameters in Collaboration's config.xml file.

**Note:** Do not change nodes that are not documented in this table.

**Table A-3 Nodes in config.xml**

Node	Description
portal version	Displays the version of the owning portal.
audit	Filename of the audit runtime configuration file.

**Table A-3 Nodes in config.xml**

<b>Node</b>	<b>Description</b>
database	Filename of the database connectivity configuration file.
cache	Filename of the managed cache configuration file.
search enabled	Enables and disables communication between Collaboration and the Search Service. Valid values are <b>yes</b> and <b>no</b> .
servername	The host name of the Search Service. This value should be a fully-qualified domain name.
port	The port where the Search Service listens for communication.
defaultLanguage	The default language of the Search Service.
languages_dir	The pathname to the location where language information is stored by the Search Service.
textExtraction	The path and filename of the application used to perform text extraction.
maxTextBytesToIndex	The maximum size for each object that is indexed by the Search Service.
temp_dir	The pathname of the temporary directory used by the Search Service.
enableLogging	Enables and disables Search Service logging. Valid values are <b>true</b> and <b>false</b> .
runReconcileThread	This should be set to <b>true</b> on the machine on which Collaboration is installed. In a load balancing environment, set to <b>false</b> on all servers except one. In a global deployment environment, set to <b>false</b> on all satellite nodes and set to <b>true</b> on exactly one server at the master node.
realTimeIndexing	If not in a global deployment, set this value to <b>true</b> on all machines on which Collaboration is installed. If in a global deployment, set to <b>false</b> on all machines on which Collaboration is installed, including the master node.

**Table A-3 Nodes in config.xml**

<b>Node</b>	<b>Description</b>
fileTypeRegister	Filename of the filetypes configuration file.
maxUploadMegaBytes	The maximum size for a single file upload.
bulkUpload	Enables and disables the Bulk Upload feature. Valid values are <b>yes</b> and <b>no</b> .
nonGatewayedUploads	<p>Determines if uploads are gatewayed through the Portal server. Valid values are:</p> <p><b>yes:</b> Uploads are gatewayed through the Portal server.</p> <p><b>no:</b> Uploads are not gatewayed through the Portal server.</p>
url	<p>The base URL Microsoft Word uses to communicate with Collaboration. This attribute is used if enable is set to <b>true</b>.</p> <p><b>Example:</b> http://collab.myco.com:8080/collabserver</p>
tokenBasedAuthentication	<p>Determines if token-based authentication is used. In a normal Collaboration implementation, there is no need to change these values. Valid values are:</p> <p><b>true:</b> Enables token-based authentication. This is the default.</p> <p><b>false:</b> Disables token-based authentication. This setting can only be used when HTTP communication is gatewayed and some other authentication method is being used.</p>
useClustering	<p>Controls the use of message clustering with token-based authentication. Valid values are:</p> <p><b>yes:</b> Enables message clustering. This is the default.</p> <p><b>no:</b> Disables message clustering. This setting should only be used when message clustering is not required and would degrade performance.</p> <p><b>Note:</b> This setting has no effect if general clustering functionality has been disabled for Collaboration. Therefore we recommend that you enable useClustering at all times.</p>



**Table A-3 Nodes in config.xml**

<b>Node</b>	<b>Description</b>
maxWaitSeconds	Determines how long Collaboration waits for a response from other servers in the cluster. This setting is applicable only if token-based authentication and message clustering are enabled.  <b>Default:</b> 30
webEdit	Enables or disables WebEdit. Valid values are <b>yes</b> and <b>no</b> .
nonGatewayed Access	Determines if HTTP communication between Microsoft Office and Collaboration is gatewayed through the portal. Valid values are:  <b>yes:</b> HTTP communication is gatewayed through the portal. This is the default.  <b>no:</b> HTTP communication is not gatewayed through the portal.
serverURL	The base URL Microsoft Word uses to communicate with Collaboration. This attribute is used if enable is set to <b>true</b> .  <b>Example:</b> http://collab.myco.com:8080/collabserver
truncateFileNames	The number of characters that are allowed in the file name displayed in WebDAV before the characters are truncated.
clsid	Specifies the class ID of the COM object.  <b>Note:</b> This value should not be modified.
fileSpec	Specifies the name of the distribution file and information about the component.  <b>Note:</b> This value should not be modified unless a more recent version of the object needs to be deployed.
installOfficeToolsPopUp	Enables or disables the Collaboration Office Tools Add-In installer. Valid values are <b>yes</b> and <b>no</b> .
webDAV	Contains WebDAV settings.

**Table A-3 Nodes in config.xml**

<b>Node</b>	<b>Description</b>
fullWebDAVAccessToThisServer	Enables or disables the use of WebDAV. Valid values are: <b>yes</b> : Causes Collaboration to accept WebDAV requests. This is the default. <b>no</b> : Causes Collaboration to reject WebDAV requests.
requestsAreGatewayed	Enables or disables WebDAV communication between Windows Explorer and Collaboration. Valid values are <b>true</b> and <b>false</b> .
uiDisplaysServerConfigInfo	Controls how Collaboration displays the <b>New   Web Folder</b> dialog in the <b>Documents</b> tab. Valid values are: <b>yes</b> : Displays the Web Folder dialog box. This is the default. <b>no</b> : Does not display the Web Folder dialog box.
useNonGatewayedURL	Determines whether the Web Folder dialog box displays instructions for mapping a gatewayed network drive. Valid values are: <b>no</b> : Cause the Web Folder dialog to display information for mapping between Windows Explorer and Collaboration through the gateway. This is the default. <b>yes</b> : Causes the Web Folder dialog to display information for mapping directly between Windows Explorer and Collaboration.  <b>Note:</b> If the connection between Windows Explorer and Collaboration is gatewayed, this instance of Collaboration continues to function as the WebDAV service. Therefore, this instance of config.xml must have <b>fullWebDAVAccessToThisServer.enabled</b> set to <b>true</b> and <b>fullWebDAVAccessToThisServer.requestsAreGatewayed</b> set to <b>true</b> .
serverURL	Provides the base URL to Collaboration that acts as the WebDAV service if Collaboration is configured to communicate directly with Windows Explorer.

**Table A-3 Nodes in config.xml**

<b>Node</b>	<b>Description</b>
imageServer	Specifies the relative paths to the folders in Image Service where the Collaboration images, help, and javascript can be found.
baseURL	The base URL of the image service used with Collaboration. By default, this node is empty and Image Service is used. We recommend that you leave this node empty; however, if necessary, you can use this node for debugging purposes or to point to an image service other than the Image Service.
images	The relative path where the images are stored.
javascript	The relative path where the javascript source files are stored.
misc	The relative path to where miscellaneous source files are stored.
help	The relative path where the Collaboration online help files are stored.
help508	The relative path where online help files for 508-mode are stored.
portal_common	The location of common portal images.
applets	The relative path where java applets are stored.
messaging	Configuration section for communicating with the Notification Service.
notification	Enables or disables the Notification Service. Valid values are <b>yes</b> and <b>no</b> .
host	The host of the Notification Service.
port	The port where the Notification Service listens for communication.

**Table A-3 Nodes in config.xml**

<b>Node</b>	<b>Description</b>
max-queue-size	Maximum number of notification events that can be queued at any one point in time. Generally this value should not be increased but can be decreased to throttle the number of notification events being sent out.
name	The owning portal name as specified during Collaboration installation.
password secure	<p>Indicates whether or not the owning portal password is encrypted (and secure). If you are using an encrypted password, set to <b>yes</b>.</p> <p>Valid values are:</p> <p><b>yes:</b> Indicates that the owning portal password is encrypted and secure.</p> <p><b>no:</b> Indicates that the owning portal password is not encrypted and not secure.</p>
gateway-entry https:	Defines the main access point for the portal. If the portal has been configured to use https but this is not set in the portal PTSERVERCONFIG table, you can set the attribute https to <b>yes</b> to force https.
cluster	Enables and disables clustering. Valid values are <b>yes</b> and <b>no</b> .
http-caching portlet	Enables and disables portlet caching. Valid values are <b>yes</b> and <b>no</b> .
web-services	Enables and disables Collaboration Web services. Valid values are <b>yes</b> and <b>no</b> .
administration	Enables and disables Collaboration Administration pages.
object-migration	Enables and disables object migration functionality. Valid values are <b>yes</b> and <b>no</b> .
jscontrols	Settings for the jscontrols components.
imageServerConnectionURL	Alternative non-SSL URL to access jscontrols if Image Service is running on SSL.

**Table A-3 Nodes in config.xml**

<b>Node</b>	<b>Description</b>
debugLevel	Internal debug level for the jscontrols component.
calendar-cache	Enables and disables calendar caching. Valid values are <b>true</b> and <b>false</b> .
calendar-trace	Enables and disables trace for debugging of calendar problems. Valid values are <b>true</b> and <b>false</b> . Do not modify this node unless instructed to do so by BEA Technical Support.
explorer	Settings for Collaboration Explorer controls.
serverSidePagination	Enables and disables server-side pagination of Explorer controls to improve performance when there are many items. Valid values are <b>yes</b> and <b>no</b> .
upgrade	Refers to a copy of the old config.xml file after an upgrade.
browserMode	Do not modify this node. BEA supports only Normal mode.
richTextEditor	Enables and disables the rich text editor for discussion messages and announcements. Valid values are <b>yes</b> and <b>no</b> .
activityRight	Determines whether to check community roles for managing Collaboration projects.
checkCommunityRoles	<p>If enabled, this node performs extra checks to verify whether a user has Project Leader access to a community project. Valid values are <b>true</b> and <b>false</b>.</p> <p><b>Note:</b> Enabling this node may slow down the performance of Project Explorer.</p>
globalDeployment	<p>Enables and disables global deployment features. Valid values are <b>yes</b> and <b>no</b>.</p> <p><b>Note:</b> We recommend that you do not modify this node, as BEA does not support global deployment in Collaboration 4.1.</p>

**Table A-3 Nodes in config.xml**

<b>Node</b>	<b>Description</b>
auto-create-community project	Valid values are:  <b>yes:</b> Causes Collaboration to automatically create community projects on Community pages.  <b>no:</b> Disables automatic create community project functionality.
groupware	This node is used to configure groupware integration. Valid values are:  <b>yes:</b> Enables groupware integration.  <b>no:</b> Disables groupware integration. If this setting is used, all other settings in this section are ignored.
type	Indicates the type of back-end server used. Valid values are:  <b>notes:</b> Enables the Lotus Domino groupware server.  <b>exchange:</b> Enables Microsoft Exchange groupware server.
soapServerURL	Specifies the SOAP server URL specified during Collaboration installation.
timeoutInMilliSecond	Specifies the amount of time, in milliseconds, that Collaboration waits for responses from the SOAP server. If the SOAP server does not respond in this amount of time, the current operation is aborted and an exception is returned.  <b>Note:</b> Due to the performance constraints and the fact that large attachments might be transferred between Collaboration via Exchange, the attribute should be set to a value greater than 10000 (10 seconds).
calendarCachePeriod	Specifies the cache time-out period, in seconds, for groupware items on the My Calendar portlet. When the My Calendar portlet is refreshed, Collaboration checks if the current items have timed out. If they have, Collaboration retrieves the entries from the back-end server. Otherwise, the entries are retrieved from memory.

**Table A-3 Nodes in config.xml**

Node	Description
addressBookReturn	The maximum number of returned addresses from the address search operation.
maxAttachment SizeinKB	<p>The maximum attachment file size, in kilobytes, that a meeting request or appointment can contain.</p> <p><b>Note:</b> This limit is the total file size of all attachments an item can have.</p>
calendarAutoSynch	Enables or disables automatic synchronization between a user's project calendar and their Exchange or Notes calendar. Valid values are: <b>yes</b> and <b>no</b> .
monthRange	The range of months auto-synchronization covers, starting from the current month.
instant-messaging	This node is used to enable instant messaging.
presence-url	This node returns an image to indicate whether the user is online or not.
send-url	This node includes the URL from which messages are sent. The <i>\$user</i> variable includes the e-mail address of the individual user.
contact-url	This node should include the URL at which messages can be received. The <i>\$user</i> variable includes the e-mail address of the individual user.
presence-poll-interval	This node includes the number of seconds between presence polls.
project-import	Contains parameters that are specific to Microsoft Project import.
number-of-tasks-limit	The total number of tasks allowed in an import. The default is 1000.
email	This node is used to configure settings to let users send an e-mail directly to a project from their groupware.
domain	The e-mail domain. For example: <i>mail.buttercut.plumimap.com</i>

**Table A-3 Nodes in config.xml**

Node	Description
connection-pool	The number of socket handlers for incoming connections.
mail-processors	The number of threads devoted to processing incoming e-mails.
maximum-message-size	The maximum size of incoming e-mails. -1 indicates that Collaboration does not perform size checks. When this is the case, the Collaboration API enforces size limits for message bodies and files.
authorized-connections	The names or IP addresses of hosts, in a comma-delimited format, that are allowed to connect to the SMTP handler. We recommend creating this list of names to enforce security. See the config.xml file for an example of this list.
idle-timeout	The time (in minutes) that an incoming connection can remain idle.
transaction-manager	This node includes database-specific settings. Only database experts should modify these settings.

## documentTemplates.xml

You can define the system-wide document templates that appear in the user interface when creating a new Microsoft Office document by adding entries to **documentTemplates.xml**. By default, this file only includes document templates for empty Microsoft Office documents. You can add additional entries to allow custom document templates to appear in the interface.



The following table provides a detailed description of the configuration parameters in Collaboration's documentTemplates.xml file.

**Table A-4 Nodes in documentTemplates.xml**

Node	Description
templateFile cache	The name of a file located in <collab-directory>/settings/documentTemplates. Valid values are:  <b>True:</b> Set for smaller files that should be cached in memory. <b>False:</b> Set for very large files that should not be cached in memory.
fileType	The name of one of the filetypes from filetypes.xml for which inPlaceEdit is enabled.
displayString	The string to appear in the drop-down list in the graphical user interface. Not used unless the next field below is empty.
displayStringIndex	Index into the Collaboration localized string files of a string to use in the drop-down list. If this field is not empty, the previous field above is not used.
defaultDocName	Default document name for new documents created from this template. Not used unless the next field below is empty.
defaultDocNameIndex	Index into the Collaboration localized string files of a string to use as the default document name for documents created from this template. If this field is not empty the previous field above is not used.

## filetypes.xml

You can define filetypes corresponding to the types of documents that are used in your implementation. New filetypes can be added to the configuration file **filetypes.xml**.

Creating filetypes lets you have more control over indexing and search. It also lets you specify icons for each filetype, thereby customizing the Collaboration user interface. The following types of documents have filetypes defined by default:

- HTML
- Microsoft Excel

- Microsoft PowerPoint
- Microsoft Project
- Microsoft Word
- Microsoft Visio
- PDF
- text
- zip

To define new filetypes, you must create a new entry in **filetypes.xml**. Place the entries in the order in which you want them to appear in the user interface. You can define multiple content types and extensions for each filetype. You should ensure that the preferred content type and extension are defined first. Use the following guidelines when changing the contents of filetypes.xml:

- Do not modify the <UNKNOWN index> node. However, you may modify the other nodes and add new entries
- Put the entries in the order in which they should appear in a drop-down list
- You may use multiple contentType and extension fields in each index
- You should place the preferred content type as first in the list for each index
- No content type or extension should appear in more than one fileType entry

The following table provides a detailed description of the configuration parameters in Collaboration's filetypes.xml file.

**Table A-5 Nodes in filetypes.xml**

Node	Description
UNKNOWN index	<b>Note:</b> Do not modify this node or its subnodes.
html index	Specifies whether html documents should be indexed for searching. Valid values are <b>yes</b> and <b>no</b> .
msexcel index	Specifies whether Microsoft Excel documents should be indexed for searching. Valid values are <b>yes</b> and <b>no</b> .

**Table A-5 Nodes in filetypes.xml**

<b>Node</b>	<b>Description</b>
mspowerpoint index	Specifies whether Microsoft PowerPoint documents should be indexed for searching. Valid values are <b>yes</b> and <b>no</b> .
msproject index	Specifies whether Microsoft Project documents should be indexed for searching. Valid values are <b>yes</b> and <b>no</b> .
msword index	Specifies whether Microsoft Word documents should be indexed for searching. Valid values are <b>yes</b> and <b>no</b> .
msvisio index	Specifies whether Microsoft Visio documents should be indexed for searching. Valid values are <b>yes</b> and <b>no</b> .
pdf index	Specifies whether .pdf documents should be indexed for searching. Valid values are <b>yes</b> and <b>no</b> .
text index	Specifies whether .txt documents should be indexed for searching. Valid values are <b>yes</b> and <b>no</b> .
gzip index	Specifies whether .zip files should be indexed for searching. Valid values are <b>yes</b> and <b>no</b> .
displayString	This string is used directly in the graphical user interface to describe this type of document if no displayStringIndex occurs.
shortcutDisplayString	This string is used directly in the graphical user interface to describe this type of document shortcut if no shortcutDisplayStringIndex occurs.
displayStringIndex	If a displayStringIndex entry occurs, it is used as a key into Collaboration's localized language files.
templateDisplayString	This string is used directly in the graphical user interface to describe this type of document template if no templateDisplayStringIndex occurs.
shortcutDisplayStringIndex	If a shortcutDisplayStringIndex entry occurs, it is used as a key into Collaboration's localized language files.
templateDisplayStringIndex	If a templateDisplayStringIndex entry occurs, it is used as a key into Collaboration's localized language files.
portalDisplayStringIndex	This string is used as a key into the portal's localized language files. The resulting string appears on the Search Results page.

**Table A-5 Nodes in filetypes.xml**

<b>Node</b>	<b>Description</b>
imageFile	The name of the file icon in <ImageService>/plumtree/collab/private/img.
shortcutImageFile	The name of the file shortcut icon in <ImageService>/plumtree/collab/private/img.
templateImageFile	The name of the file temaplate icon in <ImageService>\plumtree\collab\private\img.
contentType	The value of the Content-Type header sent to the browser for this type of file. More than one contentType subnode may appear for each fileType node, but the same contentType should not be used for more than one fileType.
extension	The file extension for this type of file. More than one extension subnode may appear for each fileType node, but the same extension should not be used for more than one fileType.
webEdit	Specifies whether this type of file is WebEditable. Unless serious modifications are made to the code, only Microsoft Office applications are WebEditable. Valid values are <b>yes</b> and <b>no</b> .
appCode	Represents the application that opens the document in a WebEdit session. Valid values are: <ul style="list-style-type: none"> <li>• <b>1</b> (for Microsoft Word)</li> <li>• <b>2</b> (for Microsoft Excel)</li> <li>• <b>3</b> (for Microsoft PowerPoint)</li> </ul>

## database.xml

This section provides information about the <linked-database-alias> node in database.xml.

When using a SQL Server database for Collaboration, the <linked-database-alias> node should appear like the following:

```
<linked-database-alias>PORTAL_DB_NAME.PORTAL_DB_OWNER.</linked-database-alias>
```

Both periods ( . ) in the linked database alias are required. The PORTAL\_DB\_OWNER must be the owner of the database who created the portal tables; it is not adequate to have db\_owner permission on the database.

To verify that you are using the correct user:

1. Open the portal database in SQL Server Enterprise Manager.
2. Click **Tables**.
3. Check the login name that appears in the Owner column of the tables. This login name is the owner that should appear in the <linked-database-alias> node.

If you used the *sa* login to create the portal tables, the database owner is *dbo*. To confirm this, verify the database owner in Enterprise Manager.

**Note:** If you edit database.xml, you must stop and start Collaboration for the changes to take effect.



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