



# **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.

## Typographical Conventions

This book uses the following typographical conventions.

**Table 1-1** Typographical Conventions

Convention	Typeface	Examples/Notes
<ul style="list-style-type: none"><li>Items you need to take action on (such as files or screen elements)</li></ul>	<b>bold</b>	<ul style="list-style-type: none"><li>Upload <b>Procedures.doc</b> to the portal.</li><li>To save your changes, click <b>Apply Changes</b>.</li></ul>
<ul style="list-style-type: none"><li>User-defined variables</li><li>New terms</li><li>Emphasis</li><li>Object example names</li></ul>	<i>italic</i>	<ul style="list-style-type: none"><li>The migration package file is located in <i>install_dir\serverpackages</i>.</li><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>

Table 1-1 Typographical Conventions

Convention	Typeface	Examples/Notes
<ul style="list-style-type: none"><li>Text you enter</li><li>Computer generated text (such as error messages)</li><li>Code samples</li></ul>	computer	<ul style="list-style-type: none"><li>Type Marketing as the name of your community.</li><li>This script may generate the following error: ORA-00942 table or view does not exist</li><li>Example: <pre>&lt;setting name="SSOCookieIsSecure"&gt;     &lt;value         xsi:type="xsd:integer"&gt;0&lt;/value&gt; &lt;/setting&gt;</pre></li></ul>
<ul style="list-style-type: none"><li>Environment variables</li></ul>	ALL_CAPS	<ul style="list-style-type: none"><li>The default location of BEA_HOME is C:\bea.</li></ul>

# BEA Documentation and Resources

This section describes other documentation and resources provided by BEA.

Table 1-2 BEA Documentation and Resources

Resource	Description
Installation Guide	<p>This guide describes the prerequisites (such as required software) and procedures for installing BEA AquaLogic Interaction Collaboration.</p> <p>It is available on <a href="http://edocs.bea.com/alui/collaboration/docs42">edocs.bea.com/alui/collaboration/docs42</a>.</p>
Installation Worksheet	<p>This worksheet allows you to record prerequisite information necessary for installing Collaboration.</p> <p>It is available on <a href="http://edocs.bea.com/alui/collaboration/docs42">edocs.bea.com/alui/collaboration/docs42</a>.</p>
Release Notes	<p>The release notes provide information about new features, issues addressed, and known issues in the release.</p> <p>They are available on <a href="http://edocs.bea.com/alui/collaboration/docs42">edocs.bea.com/alui/collaboration/docs42</a> and on any physical media provided for delivering the application.</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 the help icon.</p>

**Table 1-2 BEA Documentation and Resources**

Resource	Description
Deployment Guide	This guide is written for business analysts and system administrators. It describes how to plan your AquaLogic User Interaction deployment. It is available on <a href="http://edocs.bea.com/alui/deployment/index.html">edocs.bea.com/alui/deployment/index.html</a> .
Developer Guides, Articles, API Documentation, Blogs, Newsgroups, and Sample Code	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.

**Table 1-2 BEA Documentation and Resources**

Resource	Description
AquaLogic User Interaction (ALUI) and AquaLogic Business Process Management (ALBPM) Support Center	<p>The ALUI and ALBPM Support Center is a comprehensive repository for technical information on ALUI and ALBPM 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 ALUI and ALBPM-related needs. The Support Center encompasses the following communities:</p> <p><b>Technical Support</b></p> <p>Submit online service requests, check the status of your requests, search the knowledge base, access documentation, and download maintenance packs and hotfixes.</p> <p><b>User Group</b></p> <p>Participate in user groups; view webinars, presentations, the CustomerConnection newsletter, and the Upcoming Events calendar.</p> <p><b>Product Center</b></p> <p>Download product updates, maintenance packs, and patches; view the Product Interoperability matrix (supported third-party products and interoperability between products).</p> <p><b>Developer Center</b></p> <p>Download developer tools, view code samples, access technical articles, and participate in discussions.</p> <p><b>Education Services</b></p> <p>Review the available education options, then choose courses by role and delivery method (Live Studio, Public Classroom Training, Remote Classroom, Private Training, or Self-Paced eLearning).</p> <p><b>Profile Center</b></p> <p>Manage your implementation details, local user accounts, subscriptions, and more.</p> <p>If you do not see the Support Center when you log in to <a href="http://one.bea.com/support">one.bea.com/support</a>, contact <a href="mailto:ALUISupport@bea.com">ALUISupport@bea.com</a> or <a href="mailto:ALBPMSupport@bea.com">ALBPMSupport@bea.com</a> for the appropriate access privileges.</p>

Table 1-2 BEA Documentation and Resources

Resource	Description
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> or <a href="mailto:ALBPMSupport@bea.com">ALBPMSupport@bea.com</a></p> <p>Phone Numbers:</p> <p>USA, Canada +1 866.262.7586 or +1 415.263.1696</p> <p>EMEA +44 1494 559127</p> <p>Asia Pacific +61 2.9931.7822</p> <p>Australia/NZ +61 2.9923.4030</p> <p>Singapore +1 800.1811.202</p>

Welcome

# Overview of Collaboration

This chapter provides an overview of Collaboration and the administrative tasks you perform to manage Collaboration projects and objects. It includes the following topics:

- [What is Collaboration](#)
- [Overview of Collaboration Components](#)
- [Overview of AquaLogic Interaction Components](#)
- [Overview of Collaboration Security](#)
- [Overview of the Collaboration Browsing User Interface](#)
- [Overview of the Collaboration Administrative Objects and Tools](#)

## What is Collaboration

Collaboration is part of the BEA AquaLogic User Interaction suite of products. Collaboration integrates directly with the AquaLogic Interaction portal to take advantage of portal functions such as search, user identification and authentication, and group management. Collaboration extends the portal functionality by providing online work spaces that enable users to collaborate on projects.

Some of the features Collaboration provides include:

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



# Overview of Collaboration Components

The following table describes the Collaboration components you must install and configure before you can use the procedures provided in this guide to manage Collaboration projects and objects.

**Table 2-1 Summary of Collaboration Components**

Component	Description
Collaboration Database	<p>Stores Collaboration data such as calendar, task, discussion, and subscription information. It also stores information about the documents used by Collaboration. The Collaboration database does not store these documents; they are stored in the Document Repository Service.</p> <p>For information on setting up the Collaboration database, see the <i>Installation and Upgrade Guide for BEA AquaLogic Interaction Collaboration</i>.</p>
Collaboration Web Application	<p>Enables end users to access Collaboration projects and their contents via the Collaboration portlets. The Collaboration web application also enables some administrative actions, such as configuring access to projects and their objects.</p> <p>For information on installing the Collaboration web application, see the <i>Installation and Upgrade Guide for BEA AquaLogic Interaction Collaboration</i>.</p>
Image Service Files	<p>Include all necessary images, styles, user interface controls, Java applets, and online help for Collaboration. Install these files on the same machine on which the portal's Image Service is installed.</p> <p>For information on installing the Image Service Files, see the <i>Installation and Upgrade Guide for BEA AquaLogic Interaction Collaboration</i>.</p>
Groupware Service	<p>Enables integration with the following groupware servers:</p> <ul style="list-style-type: none"> <li>• Microsoft Exchange</li> <li>• Lotus Domino</li> </ul> <p>When Collaboration is integrated with a groupware server, users can synchronize their Collaboration calendar with a groupware calendar and perform various groupware tasks from within Collaboration.</p> <p>For information on installing the Groupware Service, see the <i>Installation and Upgrade Guide for BEA AquaLogic Interaction Collaboration</i>.</p> <p>For information on groupware integration and groupware server version support, see <a href="#">“Integrating Collaboration and Groupware” on page 6-12</a>.</p>

# Overview of AquaLogic Interaction Components

Collaboration is designed to integrate with the AquaLogic Interaction portal. When Collaboration is installed, a number of administrative objects, activity rights, and the Collaboration Administration Utility are created in the portal.

The following table describes the AquaLogic Interaction components that are used by Collaboration.

**Table 2-2 Summary of AquaLogic Components**

Component	Description
Portal Database	<p>The portal database stores portal objects, such as user and group configurations, document records, and administrative objects. The portal database does not store the documents available through your portal. Source documents are left in their original locations.</p> <p>For information on setting up the portal database, see the <i>Installation and Upgrade Guide for BEA AquaLogic Interaction</i>.</p>
Administrative Portal	<p>The administrative portal handles portal setup, configuration, and content. It enables administrative functions, such as creating and managing portlets and other web services.</p> <p>For information on installing the Administrative Portal, see the <i>Installation and Upgrade Guide for BEA AquaLogic Interaction</i>.</p>
Portal	<p>The portal serves end user portal pages and content. It enables end users to access portal content via My Pages, community pages, the Knowledge Directory, and search. The portal also enables some administrative actions, such as setting preferences on portlets or managing communities..</p> <p>For information on installing the portal, see the <i>Installation and Upgrade Guide for BEA AquaLogic Interaction</i>.</p>
Image Service	<p>The Image Service serves static content used or created by portal components. It serves images and other static content for use by the AquaLogic User Interaction system.</p> <p>Whenever you extend the base portal deployment to include additional components, such as portal servers or integration products, you may have to install additional Image Service files. For information on installing the Image Service files for those components, refer to the documentation included with the component software.</p> <p>For information on installing the Image Service, see the <i>Installation and Upgrade Guide for AquaLogic Interaction</i>.</p>

**Table 2-2 Summary of AquaLogic Components**

Component	Description
BEA ALI Search Service	<p>The Search Service returns content that is indexed in the AquaLogic User Interaction system from the portal, Collaboration, and Publisher. The indexed content includes documents, portlets, communities, and users as well as many other AquaLogic User Interaction objects.</p> <p>For information on installing the Search Service, see the <i>Installation and Upgrade Guide for AquaLogic Interaction</i>.</p>
ALUI Directory Service	<p>The ALUI Directory Service enables AquaLogic Interaction to act as an LDAP server, exposing the user, group, and profile data in portal database through an LDAP interface. This enables other ALUI products (and other third-party applications) to authenticate users against the portal database.</p>
Automation Service	<p>The Automation Service runs jobs and other automated portal tasks. You run jobs to perform tasks such as crawling documents into the Knowledge Directory, synchronizing groups and users with external authentication sources, and maintaining the search collection.</p> <p>For information on installing the Automation Service, see the <i>Installation and Upgrade Guide for AquaLogic Interaction</i>.</p>
Document Repository Service	<p>The Document Repository Service stores content uploaded into the portal, Collaboration, or Publisher.</p> <p>For information on installing the Document Repository Service, see the <i>Installation and Upgrade Guide for AquaLogic Interaction</i>.</p>
API Service	<p>The API Service provides access to the SOAP API.</p> <p>For information on installing the API Service, see the <i>Installation and Upgrade Guide for AquaLogic Interaction</i>.</p>
AquaLogic Notification Service	<p>The AquaLogic Notification Service sends e-mail notifications to users.</p> <p>The AquaLogic Notification Service is not required for users to employ the Email a Project feature. However, if the AquaLogic Notification Service is not running, the Email a Project feature is less useful. For more information about Email a Project, see <a href="#">“Configuring Email a Project” on page 6-23</a>.</p> <p>For information on installing the AquaLogic Notification Service, see the <i>Installation and Upgrade Guide for AquaLogic Interaction</i>.</p>

## Overview of Collaboration Security

Collaboration involves managing access to Collaboration functionality as well as managing access to Collaboration projects and their content. This includes:

- Activity security, in the form of activity rights. For more information, see [“Activity Rights” on page 4-10](#).
- Project roles, which are used to control access to Collaboration projects. For more information, see [“Project Roles” on page 4-2](#)
- Access levels, which are used to control access to functional areas and objects in Collaboration projects. For more information, see [“Access Levels” on page 4-2](#).

In addition to the security available through Collaboration, you must also secure your hardware and back-end systems (for example, your portal and Collaboration databases) to fully protect your portal. You should follow all security guidance provided in your hardware and software documentation.

## Overview of Collaboration 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.

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.

Collaboration objects are defined as the following:

**Table 2-3 Types of Collaboration Objects**

<b>Collaboration Object</b>	<b>Description</b>
Project	Common work spaces for online collaboration for project teams. Projects are the containers for the other Collaboration objects.
Announcement	A way to convey important information to project members.
Discussion	A virtual forum where project users can hold online conversations. Discussions are comprised of messages.
Document Folder	A container used to organize documents, similar to folders on a file system.
Document	A file of any type that have been uploaded to Collaboration.
Event	An occurrence of importance in a project.
Task List	A set of tasks that define units of work to be completed by an assigned user.

## Overview of the Collaboration Browsing User Interface

This section describes the user interface for Collaboration browsing users. It includes the following topics:

- [Collaboration Portlets](#)
- [Project Explorer](#)
- [Application View](#)
- [Advanced Collaboration Features](#)

## 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 2-4 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 access levels, see [“Access Levels” on page 4-2](#).

### My Page Portlets

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

**Table 2-5 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.

**Table 2-5 Types of My Page Portlets**

Portlet Name	Description
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 community pages or My Pages.

## Project Explorer

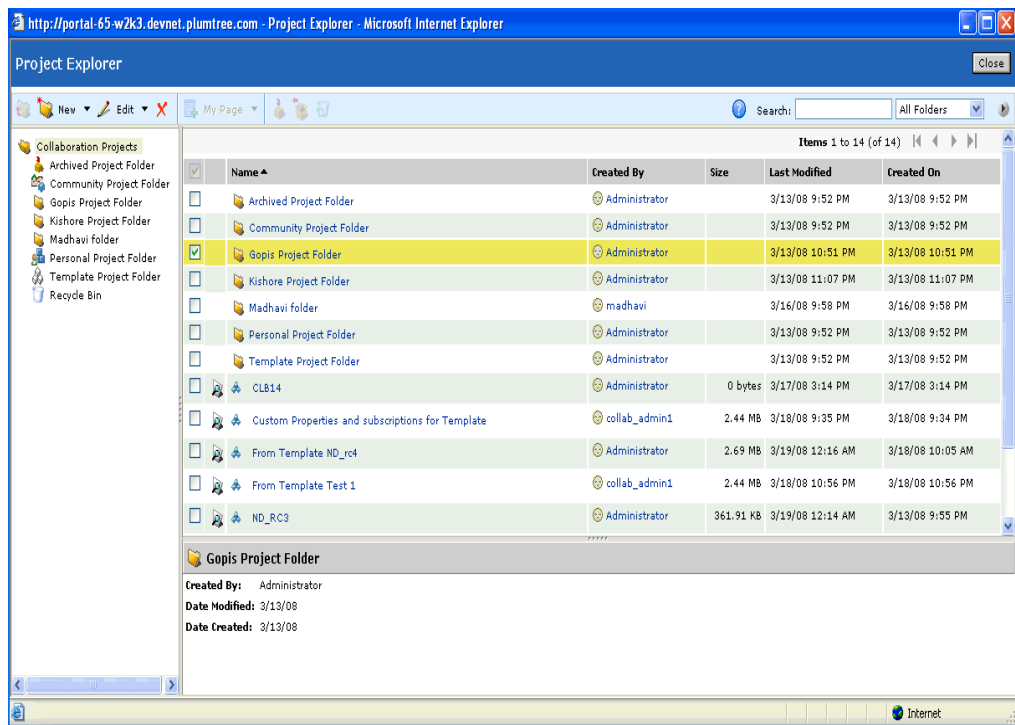
The Project Explorer lets users view all projects to which they have access in a single window. Based on levels of access, different project functionality is accessible within a universal toolbar. If a user does not have permissions to perform a certain task, that task is unavailable in the toolbar.

The Project Explorer contains the following areas:

**Table 2-6 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 2-1 Project Explorer



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

## Application View

The application view displays the functional areas and objects of a single project in one window. Selecting a tab changes the view. Each functional area has specific actions that can be enabled or disabled for a given role by assigning a Collaboration access level.

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

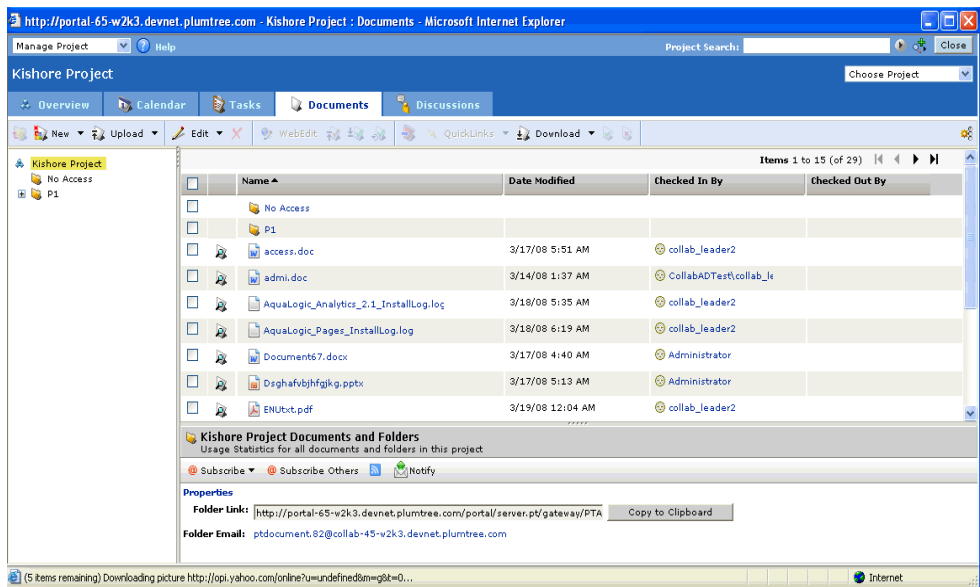


**Table 2-7 Types of Application View Tabbed Panes**

<b>Application View Tabbed Pane</b>	<b>Description</b>
Overview	Displays a summary of the project, including recent announcements, documents, and discussion messages.
Calendar	Displays project events and tasks.
Tasks	Displays the task lists in the project.
Documents	Displays documents that have been uploaded to the project.
Discussions	Displays the discussions in the project.

The following image displays an example of the application view of a project:

Figure 2-2 Example of a Project’s Application View



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 5-5](#).

# Advanced Collaboration Features

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

Table 2-8 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.

**Table 2-8 Descriptions of Advanced Collaboration Features**

Advanced Feature	Description
Desktop Integration	Lets users integrate Collaboration with the Windows desktop.
Microsoft Project Import	Lets users import Microsoft Project files into a Collaboration calendar.

For more information on using and configuring these features, see [“Integrating Collaboration” on page 6-1](#).

## Overview of the Collaboration Administrative Objects and Tools

This section describes the administrative objects, activity rights, and tools that are created in the portal when Collaboration is installed. It includes the following topics:

- [Collaboration Administrative Objects](#)
- [Collaboration Activity Rights](#)
- [Collaboration Administration Utility](#)

### Collaboration Administrative Objects

Collaboration uses the following types of administrative objects:

- Content Source
- Group
- Portlet
- Property
- Remote Server
- Web Service

These objects are created when the Collaboration migration package is imported during the installation process and are accessed through the Administration section of the portal. By default, they are created in a folder named Collaboration. If you have upgraded from an earlier version of Collaboration, these objects may be located in a different administrative folder.

For information on each object type, see the *Administrator Guide for AquaLogic Interaction*.

For information on each individual Collaboration administrative object and how it is used, see the description of each object in the portal.

## Collaboration Activity Rights

Collaboration uses activity rights to control access to Collaboration functionality. The Collaboration activity rights are created when the Collaboration migration package is imported during the installation process. Activity rights are accessed and managed through the Activity Manager in the Administration section of the portal. For more information on the Collaboration activity rights and how to assign activity rights to portal users, see [“Granting Activity Rights to Users” on page 4-11](#).

## Collaboration Administration Utility

The Collaboration Administration Utility is used to manage global settings that affect the functionality of Collaboration across all Collaboration projects. The Collaboration Administration Utility is created in the portal during installation and is accessed through the **Select Utility** drop-down list in the Administration section of the portal. For more information on using the Collaboration Administration Utility, see [“Working with the Collaboration Administration Utility” on page 3-2](#).

# Administering Collaboration

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

- [Default Administrator Groups](#)
- [Working with the Collaboration Administration Utility](#)
- [Configuring Collaboration for Importing Files into the Knowledge Directory](#)
- [Setting Up Collaboration Logging](#)
- [Backing Up and Restoring Collaboration](#)
- [Configuring the Notification Service for Working with Experience Definitions](#)

For details on assigning moderators to folders and discussions, see [“Assigning Moderators” on page 4-8](#).

For details on clustering Collaboration, see *AquaLogic User Interaction Networking and Authentication Guide*.

## Default Administrator Groups

When Collaboration is installed, two default Collaboration administrator groups are created in the portal as follows:

- **Collaboration Project Administrators:** By default, this group contains the portal Administrators group and has the following activity right:
  - Manage Collaboration Projects
- **Collaboration Administrators:** Initially, this group does not have any members. An authorized portal administrator must add the first user and/or group to this new group. By default, this group is installed with the following activity rights:
  - Access Administration
  - Access Utilities
  - Manage Collaboration
  - Manage Collaboration Projects

**Collaboration Project Administrators** can create and manage projects and project templates.

**Collaboration Administrators** can configure global settings that apply to all Collaboration projects by using the Collaboration Administration Utility. They can also manage the Collaboration project folder hierarchy.

For more information on the activity rights granted to the default administrator groups, see [“Activity Rights” on page 4-10](#).

## Working with the Collaboration Administration Utility

The Collaboration Administration Utility controls global settings that affect the functionality of Collaboration across all Collaboration projects.

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

- [Accessing the Collaboration Administration Utility](#)
- [Performing Diagnostic Tests](#)
- [Configuring Miscellaneous Settings](#)

- [Creating, Editing and Deleting Holidays](#)
- [Setting Up Collaboration for Publishing](#)
- [Configuring Groupware Servers](#)
- [Monitoring Notification Health](#)
- [Working with the Search Server](#)
- [Granting Portal Access to Collaboration](#)

## Accessing the Collaboration Administration Utility

Collaboration Administrators can access the Collaboration Administration Utility via the portal from the Select Utility drop-down list.

To access the Collaboration Administration utility:

1. Log in to the portal.
2. Click the **Administration** tab.
3. In the Select Utility drop-down list, click **Collaboration Administration Utility**.

## Performing Diagnostic Tests

The Diagnostics page provides diagnostic and configuration information about the various components of Collaboration. 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 Server	Verifies that the Search Server 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 3-12](#)

## 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 Leader can define the maximum size for a specific project in that project's General Settings page. Project Leaders with the Manage Collaboration Projects activity right can set a project size that exceeds the maximum set here.

**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.

### Enabling Add to My Page

If you want your users to be able to add projects to their My Page, select the **Enable Add To My Page** check box. By default, this check box is selected.

## Enabling Portal Group Notifications

If you want your users to be able to select individual users within portal groups or entire portal groups at once to receive notifications, select the **Enable portal group notifications** check box. By default, this check box is cleared.

## 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.

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

## 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

WebEdit simplifies the process of editing a document in Collaboration. Using this feature a user can edit a Microsoft Office document “in-place,” without having to perform check-ins, check-outs, uploads, and downloads.

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.

To use WebEdit, an end user's browser must **not** be configured to disable Microsoft ActiveX controls. Users can still employ the features of WebEdit without having the Collaboration Office Tools Add-In installed on their machines.

## Enabling Bulk Upload

The Bulk Upload feature allows users to upload multiple documents or to copy a directory hierarchy from a local machine to Collaboration. To enable this feature:

1. If you did not choose to enable the Bulk Upload feature during installation, you must edit **config.xml** and set the **bulkUpload.enabled** element to **yes**.

Alternatively, you may enable Bulk Upload by using the Collaboration Administration utility.

- a. Click the **Administration** tab.
  - b. Select the **Collaboration Administration** utility.
  - c. Click **Miscellaneous Settings**.
  - d. Click **Enable bulk upload**.
2. Grant the corresponding activity rights by performing the following:
    - a. Click the **Administration** tab.
    - b. Select the **Activity Manager** utility.
    - c. Click **Enable bulk upload**.
    - d. Click **Add Group**.
    - e. Select the groups you want to add.
    - f. Click **OK**.
    - g. Click **Finish**.

## Client Requirements for Using Bulk Upload

This section describes the client settings required to use the Bulk Upload feature. After Bulk Upload has been enabled, the following software must be installed on the client machine:

- Java Runtime Environment (JRE), version 1.4.2 or higher
- Java Plug-in, version 1.4 or higher
- The Bulk Upload Applet

When a user attempts to use the Bulk Upload feature, the browser verifies if the Java Runtime Environment and the Java Plug-in are installed. If they are not, the user will be prompted to download and install them.

If they are installed, the Java Plug-in attempts to load the Bulk Upload applet. If the applet is not found, it is downloaded from the Image Service. The user is then prompted to trust the applet. Users should answer “Always” when prompted to trust the applet.

## 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.

## Setting the Number of Document Versions

If you want to limit the number of document versions that Collaboration manages, select the **Enable system-wide control of document versions** check box and type a number from 3 to 999 into the **Maximum number of versions allowed** box. Collaboration keeps the most recent specified number of versions and permanently removes the extra versions.

For example: Collaboration has 25 versions of a document. You specify 10 as the maximum number of versions allowed. Collaboration removes versions 1-15 of the document, keeping versions 16-25 (which are the 10 most recent versions). A user creates version 26 of the document. As a result, Collaboration removes version 16, keeping versions 17-26 (again, Collaboration keeps the 10 most recent versions). This process continues for as long as users create new versions of the document.

**Note:** Collaboration removes versions on a nightly basis. For this reason, users can access all versions before Collaboration removes them. You cannot recover document versions after Collaboration has removed them.

In addition, Collaboration always keeps:

- The working version of the document. If the working version is older than the first version that you allow, Collaboration keeps the number of versions that you specify, plus the working version.
- The version of the document that has been published to the Knowledge Directory. If it is older than the first version that you allow, Collaboration keeps the number of versions that you specify, plus the published version.

**Note:** This setting does not affect document versions that are in the Project Recycle Bin.

## 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 number of characters in a discussion message** 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.

## Enabling Custom Properties

If you want to allow users to add custom properties to Collaboration documents, select **Enable Custom Properties**. When a Collaboration document is crawled or published to the Knowledge Directory, custom properties are attached to the corresponding document in the Knowledge Directory. Project leaders can define project-wide properties that exist for all documents in a project. Additionally, a project-wide property can be designated as required for publishing to the Knowledge Directory.

## Enabling RSS Feeds

If you want to allow users to view RSS feeds for objects in Collaboration, select **Enable RSS**. Users can view RSS feeds for all objects that they have permission to access. Users also have a personal RSS feed which lets them view the contents of all RSS feeds to which they have subscribed.

## 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 Publishing Content Source. The Collaboration Publishing content source must be configured before any publishing activity can take place. This section discusses how to configure the Collaboration Publishing 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 3-15](#)

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 Publishing**.

This data source is pre-configured when the **Collaboration6.ptc** file is loaded into the portal.

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**

Parameter	Description
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>\<directory name>.

**Note:** Other tasks are required for groupware integration besides configuring this page. For complete information, see [“Integrating Collaboration and Groupware” on page 6-12](#).

## 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).
- `install_dir\ptcollab\<version_number>\settings\logs\collaboration.log`.

By default, `install_dir` is **C:\bea\alui**. However, if you upgraded to Collaboration 4.5, `install_dir` is the same as in the previously installed version of Collaboration.

## Monitoring Notification Health

The Notification Health Monitor sends a notification email to an administrator when there is a problem contacting or using the Notification Service. The administrator at the specified email address is alerted when the Notification Service experiences an error, requires a restart, or is able to be contacted after a failure.

To configure notification health monitoring:

1. Go to the **Collaboration Administration** utility.
2. Click **Collaboration Notification**.
3. Specify the email host used by the Notification Service, the email address of the administrator to be contacted, and the frequency at which the notification health check is performed.
4. Click **Finish**.

## Working with the Search Server

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

### Viewing Search Server Status

Collaboration provides the following information about the Search Server:

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

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

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

Status	Description
Objects Currently Indexed	The number of Collaboration items in the Search Server 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 Server index. Since this is a lengthy and computationally expensive process, use the rebuild operation only when absolutely necessary.

To rebuild the Search Server database:

1. Go to the **Collaboration Administration** utility.
2. Click **Search Server**.
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 content crawlers to automatically import files from Collaboration into the Knowledge Directory. You must have the proper activity rights in the portal to be able to create and configure content crawlers. For information on the necessary activity rights, see the *Administrator Guide for BEA AquaLogic Interaction*.

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 3-10](#).

## 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*.

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).
  - `install_dir\ptcollab\<version_number>\settings\logs\collaboration.log` .

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

## 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**.

## Setting Up Collaboration Logging

Collaboration writes log messages to:

- Collaboration.log, which is the local Collaboration log file. This log file exists at *install\_dir\ptcollab\<version\_number>\settings\logs\collaboration.log*. No setup is required to enable logging to the Collaboration log file and view the log.
- ALI Logging Spy, which is the primary log message receiver in the ALI 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 *install\_dir*\ptcollab\4.5\settings\config, where *install\_dir* is, by default, C:\bea\alui. 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 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 3-18](#).

To configure ALI Logging Spy to display Collaboration messages:

1. Launch ALI Logging Spy by navigating to **Start | All Programs | BEA | ALI Logging Utilities | Logging Spy**. For more information on using ALI Logging Spy, see the online help provided with ALI Logging Spy.

**Note:** If you upgraded to Collaboration 4.5, the path to ALI Logging Spy is the same as in the previously-installed version of Collaboration.

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. Ensure that the Collaboration database, portal database, and Document Repository are in sync by performing 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: *install\_dir\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.

## Configuring the Notification Service for Working with Experience Definitions

Notification Service-generated emails can include user-specific URLs that point to Experience Definitions. To enable the Notification Service to include links to Experience Definitions, edit the Notification Service's config.xml and set the <experience-definitions enabled> node to yes.

**Note:** You must restart the Notification Service for this change to take effect.

# Working with Collaboration Security

This chapter describes the security model used by Collaboration. Collaboration security is based on the use of roles and access levels. Additionally, activity rights are used to manage access to Collaboration functionality. These concepts are described in the following sections.

- [Project Security](#)
- [Activity Rights](#)

## Project Security

Access to Collaboration projects is set and managed through project roles. Roles control access levels and permissions for Collaboration objects. Users are assigned to a project role, and the access level of the role determines the actions that the user can perform.

### Project Roles

A portal user can access a project only when assigned a role in that project.

Collaboration contains the following roles:

**Table 4-1 Descriptions of Project Roles**

Role	Description
Project Leader	<p>The Project Leader role has Admin access for the project and its objects. Project Leaders can:</p> <ul style="list-style-type: none"><li>• Create, edit, and delete project 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 access for the project and its objects.</p>
Project Guest	<p>By default, the Project Guest role has Read access for the project and its objects.</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 includes the rights of all lower access levels.

Each role in a project has an associated access level for each object type. A user's access level to an object or functional area is determined by his or her assigned role in the project.

## Access Level Permissions Matrix

The following table shows what permissions each access level allows for each object type:

**Table 4-2 Permissions Matrix**

	Read	Write	Edit	Admin
<b>Projects</b>	<ul style="list-style-type: none"> <li>• View project</li> <li>• View announcements</li> </ul>	<ul style="list-style-type: none"> <li>• View project</li> <li>• View announcements</li> </ul>	<ul style="list-style-type: none"> <li>• View project</li> <li>• View announcements</li> </ul>	<ul style="list-style-type: none"> <li>• Create, edit and delete announcements</li> <li>• Subscribe others</li> </ul>
<b>Events</b>	<ul style="list-style-type: none"> <li>• View events</li> <li>• Notify other users about an event</li> </ul>	<ul style="list-style-type: none"> <li>• Create events</li> </ul>	<ul style="list-style-type: none"> <li>• Attach files, task lists, and discussions</li> <li>• Edit event properties</li> </ul>	<ul style="list-style-type: none"> <li>• Configure event security</li> <li>• Delete events</li> </ul>

**Table 4-2 Permissions Matrix**

	Read	Write	Edit	Admin
<b>Tasks</b>	<ul style="list-style-type: none"> <li>• View task lists</li> <li>• Notify other users about a task list or task</li> </ul>	<ul style="list-style-type: none"> <li>• Claim tasks</li> <li>• Create tasks</li> <li>• Order tasks</li> <li>• Update task status for assigned tasks</li> </ul>	<ul style="list-style-type: none"> <li>• Assign owners to tasks</li> <li>• Attach files and discussions</li> <li>• Copy task lists</li> <li>• Create task lists</li> <li>• Import and export task lists</li> <li>• Edit task list and task properties</li> </ul>	<ul style="list-style-type: none"> <li>• Configure task list security</li> <li>• Delete task lists and tasks</li> <li>• Generate overdue task alerts</li> <li>• Move task lists</li> <li>• Subscribe others</li> </ul>
<b>Document Folders</b>	<ul style="list-style-type: none"> <li>• View folders</li> <li>• Notify other users about changes to folder contents</li> </ul>	<ul style="list-style-type: none"> <li>• Create new Microsoft Office documents directly in the project</li> <li>• Upload documents to folders</li> </ul>	<ul style="list-style-type: none"> <li>• Assign a moderator to a folder</li> <li>• Copy folders</li> <li>• Create folders</li> <li>• Edit folder properties</li> <li>• Rename folders</li> </ul>	<ul style="list-style-type: none"> <li>• Moderate a folder even though a different user is assigned as the moderator.</li> </ul> <p><b>Note:</b> Users with Admin access to document folders cannot perform this task on document folders that are not moderated.</p> <ul style="list-style-type: none"> <li>• Configure folder security</li> <li>• Delete folders</li> <li>• Move folders within the project</li> <li>• Subscribe others</li> </ul>

Table 4-2 Permissions Matrix

	Read	Write	Edit	Admin
<b>Document Files</b>	<ul style="list-style-type: none"> <li>• View documents</li> <li>• Notify other users about documents</li> <li>• View versions</li> </ul>	<ul style="list-style-type: none"> <li>• Check documents in and out</li> <li>• Undo check-out</li> <li>• WebEdit</li> </ul>	<ul style="list-style-type: none"> <li>• Attach task lists and discussions</li> <li>• Copy documents</li> <li>• Create shortcuts</li> <li>• Edit document properties</li> <li>• Publish documents to the Knowledge Directory</li> <li>• Revert documents to previous versions</li> </ul>	<ul style="list-style-type: none"> <li>• Configure document security</li> <li>• Delete documents</li> <li>• Delete previous versions of the document</li> <li>• Move documents</li> <li>• Remove owner security settings from a document</li> <li>• Subscribe others</li> </ul>

Table 4-2 Permissions Matrix

	Read	Write	Edit	Admin
Discussions	<ul style="list-style-type: none"><li>• View Discussions</li><li>• Notify other users about discussions</li></ul>	<ul style="list-style-type: none"><li>• Post messages</li><li>• Reply to messages</li></ul>	<ul style="list-style-type: none"><li>• Assign a moderator to a discussion</li><li>• Attach task lists and files</li><li>• Copy discussions</li><li>• Create new discussions</li><li>• Export discussions</li><li>• Edit discussion properties</li></ul>	<ul style="list-style-type: none"><li>• Moderate a discussion even though a different user is assigned as the moderator</li></ul> <p><b>Note:</b> Users with Admin access to discussions cannot perform this task on discussions that are not moderated.</p> <ul style="list-style-type: none"><li>• Configure discussion security</li><li>• Delete discussions and messages</li><li>• Edit messages</li><li>• Subscribe others</li></ul>

Default Project Security Settings

Collaboration provides default security settings for the Project Members and Project Guests roles that are automatically applied to a project when it is created. However, Project Leaders can change the default security settings for their individual projects. For more information, see [“Changing Default Permissions for Roles” on page 5-4.](#)



## Object-Level Security Settings

By default, all Collaboration objects derive their security from the project security settings. Changes made to the project security settings apply immediately to all objects that are configured to inherit the default settings. These changes apply to the objects retroactively. Project Leaders can choose to disable this setting and configure security directly on an object. When this setting is disabled, an object retains its security setting regardless of the security settings of the rest of the functional area.

The access levels that can be assigned to Collaboration objects are the same as those that can be set as the default security settings. Object-level security can be set for events, task lists, document folders, documents, and discussions.

To set security on a Collaboration object:

1. Navigate to the object in the project application view.
2. Select the object in the table pane.
3. Click **Edit Properties** in the action bar.
4. Click the **Security** tab.
5. Clear the **Inherit Default Security Settings** check box.
6. Select the access level for Project Members and Project Guests.
7. Click **Finish**.

## Object Properties

This section discusses:

- [Default Document Owner Security](#)
- [Setting Content Crawler Access to Folders](#)
- [Assigning Moderators](#)

### Default Document Owner Security

A user who uploads a document, or other file, to a document folder is the owner of that file. By default, an owner has full control of the file and can perform all actions on the file.

Project leaders can remove default owner security settings from any file in the project.

Additionally, users with Admin access to a file can remove default owner security settings from

the file. You may want to remove owner security settings from a file if the owner is no longer participating in the project and consequently should not have high-level access privileges to the file.

To remove owner security settings from a file:

1. In the **Documents** application view page, select the check box of a file in the table pane.
2. From the Edit menu, select **Properties**.  
The Property Editor appears.
3. Click the **Security** tab.
4. Select **Permanently remove owner security settings from this document**.
5. Click **Finish**.

## Setting Content Crawler Access to Folders

By default, the contents of a folder -- including the contents of all of its subfolders -- are visible to Collaboration content crawlers for importing into the Knowledge Directory. When a folder is inaccessible to content crawlers, its contents can still be manually published to the Knowledge Directory.

To set content crawler accessibility for a folder:

1. Select a project in the My Projects or Community Projects portlet.
2. Click the **Documents** tab in the application view.
3. Select the check box of a folder in the table pane.
4. From the Edit menu, select **Properties**.
5. Perform one of the following:
  - To make the document folder accessible to content crawlers, select **Accessible to Content Crawlers**.
  - To make the document folder inaccessible to content crawlers, clear **Accessible to Content Crawlers**.
6. Click **Finish**.

## Assigning Moderators

This section discusses:

- [Assigning Moderators to Folders](#)
- [Assigning Moderators to Discussions](#)

### Assigning Moderators to Folders

To manage the contents of a folder, you can assign a collection of users or a single user to moderate the folder. Folder moderators can approve or reject documents. Folder moderators with Admin access to the folder can edit documents before approving them. Documents in a moderated folder do not become publicly available unless approved by a moderator.

If a user has checked in changes to a document in a moderated folder, those changes will not be visible until a moderator approves the changes. If a user has uploaded a document to a moderated folder, the document will not be visible until a moderator approves the document.

When at least one moderator is set for a folder, that folder is marked as a moderated folder and anyone with Admin access to the folder can also act as a moderator.

When you assign moderators to a parent folder, all subfolders inherit the moderator list. If a subfolder of the parent folder already has a moderator list, the subfolder inherits changes made to the parent folder's moderator list. If all moderators are removed from a parent folder, the parent folder and all of its subfolders are no longer moderated.

When you add or remove a moderator from a folder, the moderator is subscribed to or unsubscribed from that folder.

To assign a moderator:

1. In the **Documents** application view page, right-click a folder in the navigation pane.
2. Click **Edit Properties**.
3. Make sure the **Properties** tab is selected in the Folder Editor.
4. Click **Moderators**.
5. In the Choose Users dialog box, select the project personnel whom you want to make moderators of this folder and click **Finish**.
6. In the Folder Editor, click **Finish**.

## Assigning Moderators to Discussions

To manage the posting of messages in a discussion, you can assign a collection of users or a single user to moderate the discussion. Discussion moderators can approve or reject messages.

Discussion moderators with Admin access to a discussion can edit messages before approving them. Messages posted in moderated discussions do not appear to users in the discussions unless approved by a moderator.

If a user has posted a message to a moderated discussion, that message will not be visible until a moderator approves the message. If a user has edited a message in a moderated discussion, the changes will not be visible until a moderator approves the change.

When at least one moderator is set for a discussion, that discussion is marked as a moderated discussion and anyone with Admin access to the discussion can also act as a moderator.

To assign a moderator to a discussion:

1. In the **Discussions** application view page, right-click a discussion in the navigation pane.
2. Click **Edit**.
3. Make sure the **Properties** tab is selected in the Folder Editor.
4. Click **Moderators**.
5. In the Choose Users dialog box, select the project personnel whom you want to make moderators of this folder and click **Finish**.
6. In the Folder Editor, click **Finish**.

## Activity Rights

Access to certain Collaboration functionality is managed through the use of portal activity rights. Collaboration Administrators who have been granted the **Create Activities** and **Delegate Activities** activity right can assign the Collaboration activity rights to users.

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

**Table 4-3 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 directories at the same time</li> <li>• Map Web folders to Collaboration</li> </ul>
Manage Collaboration	Allows users to perform the following tasks: <ul style="list-style-type: none"> <li>• Access the Collaboration Administration utility (when the necessary ALI activity rights are also granted).</li> <li>• Manage Collaboration project folder hierarchy. This includes the ability to perform the following operations on the Collaboration project folders: <ul style="list-style-type: none"> <li>– Create</li> <li>– Delete</li> <li>– Move</li> <li>– Edit</li> <li>– Use the Project Recycle Bin</li> </ul> </li> </ul>
Manage Collaboration Projects	Allows users to perform the following tasks: <ul style="list-style-type: none"> <li>• Create Collaboration projects.</li> <li>• Archive Collaboration projects.</li> <li>• Remove projects from the Recycle Bin System Folder.</li> <li>• Restore (undelete) projects from the Recycle Bin System Folder.</li> </ul>

## 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*.

# Managing Projects

This chapter outlines the basic steps required for Collaboration Project Administrators to create and manage projects. It includes the following sections:

- [Creating Projects](#)
- [Managing Project Settings](#)
- [Managing the Project Application Overview](#)
- [Using Project Explorer](#)
- [Working with Community Projects](#)
- [Working with Project Templates](#)
- [Exporting Projects](#)

## Creating Projects

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*. For information on granting Collaboration activity rights, see [“Activity Rights” on page 4-10](#).

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 Server uses this information when indexing Collaboration objects.
  7. Configure additional properties on the General Settings page. For more information on the General Settings page, see *Collaboration Online Help*.
  8. Under Settings on the left-hand side of the Project Editor, click **Roles and Permissions**.
  9. Configure project roles and default access levels. For more information on configuring project access, see [“Providing Access to Projects” on page 5-4](#).
  10. Under Settings on the left-hand side of the Project Editor, click **Functional Areas**.
  11. Choose the functional areas you want to include in the project. If a functional area has content associated with it, you cannot hide its tab. For more information on enabling functional areas for a project, see [“Selecting the Functional Areas for a Project” on page 5-5](#).
  12. Click **Finish**.



# Managing Project Settings

After a Collaboration Project Administrator has created a project, Project Leaders can edit the project's properties and update the access levels and permissions of the project. Project Members and Project Guests with Admin access to the project cannot change project settings.

## Editing Project Properties

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

**Table 5-1 Descriptions of Project Properties**

Project Property	Description
General Settings	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. If a functional area has content associated with it, you cannot hide its tab.

To edit project properties:

1. Go to the **Project Explorer**.
2. Select the check box of the project you want to edit.
3. Select **Edit | Edit Properties**. The Project Editor is displayed.
4. Configure properties on each of the Project Editor pages.
5. Click **Finish**.

## Providing Access to Projects

This section outlines the procedures required to provide access to a Collaboration project. For more information about project security, see [Chapter 4, “Working with Collaboration Security.”](#)

### 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 project roles. Each role has its own set of permissions.

To grant access to a project:

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

For more information on roles, see [“Project Roles” on page 4-2](#).

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

For more information about Community Members, see [“About Community Members” on page 5-5](#).

7. Select 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. Select 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 access levels.
7. Click **Finish**.

## Removing Users From Projects

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

1. Go to the **Project Explorer**.
2. Select 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**.

## About Community Members

Community Members are groupings generated by Collaboration and are defined as follows:

- Community Managers: Portal users who have either the Admin or the Edit access privilege for a selected community.
- Community Members: Portal users who have the Select access privilege for a selected community.
- Community Guests: Portal users who have the Read access privilege for a selected community.

On the Roles and Permissions page of the Project Editor, you can add, as a group, Community Managers, Community Members, or Community Guests to a role.

## Selecting the Functional Areas for a Project

Project Leaders can select the functional areas to be displayed in a project's application view. If a functional area has content associated with it, you cannot hide its tab. In community projects,

if the community portlet corresponding to a functional area is used by the community, you cannot hide the tab for the functional area.

To select the functional areas for a project:

1. Go to the **Project Explorer**.
2. Select the check box of the project you want to edit.
3. Choose **Edit | Edit Properties**.
4. Click **Functional Areas**.
5. Select the check box next to each functional area you want to display in the project application view.
6. Click **OK**.
7. Click **Finish**.

## Managing the Project Application Overview

The Overview tab of a project's application view is composed of modules. Project Leaders can select which modules are displayed and how the modules are arranged on the page.

### Project Overview Modules

The following modules are available for use on the Overview tab:

:

**Table 5-2 Descriptions of Project Overview Modules**

Module	Description
<b>Project Information</b>	Displays the project name, description, and status.
<b>Announcements</b>	Displays the announcements for the project.
<b>Updated Documents</b>	Displays the five most recently updated documents.
<b>Recent Messages</b>	Displays the five most recently modified messages.
<b>Project Image</b>	Displays an image selected by the Project Leader.

**Table 5-2 Descriptions of Project Overview Modules**

Module	Description
<b>Upcoming Tasks</b>	Displays the next five upcoming tasks.
<b>Project Members</b>	Displays the Project Leaders, Project Members, and Project Guests.
<b>Overdue Tasks</b>	Displays the five most overdue tasks.

If a functional area has been disabled for a project, the corresponding modules cannot be added to the Overview tab. For example, if the Documents tab has been disabled, the Updated Documents module cannot be added to the Overview tab.

To select which modules are displayed in the Overview tab:

1. Open a project's application view.
2. On the Overview tab, click **Add Module**.
3. Select the modules to display.
4. Click **Finish**.

## Overview Layout

Project Leaders can choose where the modules are placed on the Overview tab. Any module can be placed in any position. To reposition a module on the page, drag the module to the desired position (by clicking the title bar of the module, holding down the mouse button, and moving the mouse), then release the mouse button. A red dashed line indicates where the module will be placed.

## Using Project Explorer

After Collaboration Project Administrators 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. The **Manage Collaboration Projects** activity right is required for all tasks unless otherwise noted.

## Creating Project Folders

Users with the **Manage Collaboration** activity right can 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. Select 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

Only users with the **Manage Collaboration** activity right can delete project folders. To delete a project or a project folder:

1. Go to the **Project Explorer**.
2. Select the check box of the project or project folder 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 [“Exporting Projects” on page 5-13](#).

## 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.

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**.

## Archiving and Restoring Projects

Collaboration Project Administrators 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.

## Archiving Projects

To archive a project:

1. Go to the **Project Explorer**.
2. Select 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.

## Working with Community Projects

The first time a Community Manager adds a Collaboration portlet to a community, a community project with the same name as the community is automatically created. By default, auto-detect is enabled on the Functional Areas page of the Community Project Editor. When this setting is enabled, only the functional areas pertaining to the community portlets that are used in the community are enabled. Project Leaders can choose to disable this setting and manually select which functional areas are displayed for the community project. If a functional area has content associated with it, or if the corresponding community portlet is used in the community, the functional area cannot be disabled.



# Working with Project Templates

Project templates facilitate the creation of projects that are similar. Users with the Manage Collaboration Projects activity right 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 Server 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 5-11.
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 the 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 5-3 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

As with regular projects, project templates are associated with three roles:

- Project Leader
- Project Member
- Project Guest

In a project template, these roles are used to control access in the projects that are created from the template. For example, if a user has the Project Member role on a project template, the user will then have the Project Member role on any project created from the template. Project Leaders can modify access levels on projects created from project templates at any time.

It is also necessary to control access to the project template itself. Only users with the Project Leader role on a project template can edit the template. Additionally, only users with the Project Leader role on a project template can create projects from the template. A user must have the **Manage Collaboration Projects** activity right in order to manage project templates.

## Exporting Projects

The Collaboration Resources page lets Collaboration Administrators choose projects 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: *install\_dir\ptcollab\4.5\settings\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.

## Managing Projects

# 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](#)
- [Integrating Collaboration and AquaLogic BPM](#)
- [Integrating Collaboration and AquaLogic Pathways](#)
- [Integrating Collaboration and AquaLogic Interaction Analytics](#)
- [Configuring Microsoft Project Import](#)
- [Configuring Email 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.

### 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 an 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*.

## Using IIS with Web Folders

If you are using the Map a Web Folder feature when the portal is deployed on 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 selected.

## 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 file appropriate to your language:

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

All .exe files are located in:

*install\_dir\ptimages\imageserver\plumtree\collab\private\applets*

To make the installer available to be downloaded by end users, set the **installOfficeToolsPopUp enabled** parameter in config.xml to **yes**.

## 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.

The Map a Web Folder feature allows a user to map a Network Place on their personal computer running Microsoft Windows to the document hierarchy in Collaboration. This allows the user to view the document hierarchy using Windows Explorer. Folders and files on Collaboration appear as directories and files in Explorer.

**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 XP or Windows 2003:

1. In the portal, click **My Account**.
2. Click **Collaboration Settings**.
3. Under Settings on the left, click **Web Folders**.
  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 Microsoft Vista:**

1. In the portal, click **My Account**.
2. Click **Collaboration Settings**.
3. Under Settings on the left, click **Web Folders**.
4. Copy the URL in the **Web Folder Location** box.
5. Open **Map Network Drive** on your desktop.
6. Click **Connect to a Web site that you can use to store your documents and pictures**.
7. Click **Next**.
8. Select **Choose a custom network location**, then click **Next**.
9. In the **Internet or network address** box, paste the URL; then click **Next**.
10. If prompted, enter your name and password, then click **Next**.
11. In the **Type a name for this network place** box, type a name, then click **Next**.
12. Click **Finish**.

A new network place is created and your 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 6-1** 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 6-1 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 6.0 or later. The following types of documents are supported by WebEdit:

- Microsoft Word
- Microsoft Excel
- Microsoft Office
- Microsoft PowerPoint

## Using IIS with WebEdit

If you are using the WebEdit feature when the portal is deployed on 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 6-2 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>
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>

**Table 6-2 config.xml Nodes for WebEdit Feature**

Node or Attribute	Description
useClustering	<p>Controls the use of message clustering (also known as <i>load balancing</i>) 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/load balancing 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>
fileSpec	<p>Specifies the name of the distribution file and information about the component.</p> <p><b>Note:</b> This value should not be modified unless a more recent version of the object needs to be deployed.</p>
installOfficeToolsPopUp enabled	<p>Enables or disables the Collaboration Office Tools Add-In installer. Valid values are <b>yes</b> and <b>no</b>.</p>

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 6-3 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 to employ the Email a Project feature. For more information about the Email a Project feature, see [“Configuring Email a Project” on page 6-23](#). Additionally, the AquaLogic Notification Service, which is used to generate and send email notifications from projects to users, is not required to employ Groupware Integration capabilities (however, if the AquaLogic Notification Service is not running the Email 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. Groupware integration tasks include the following procedures:

- [“Enabling Groupware Integration” on page 6-13](#)
- [“Configuring Groupware Servers” on page 3-10](#)
- [“Setting Up User Accounts for Groupware Integration” on page 6-13](#)



This section describes how to enable groupware integration and set up user accounts. See [“Configuring Groupware Servers” on page 3-10](#) for details on configuring groupware servers.

## Enabling Groupware Integration

This section describes how to use the Configuration Manager to enable groupware integration.

**Note:** Groupware integration is disabled by default. Do not enable groupware integration until you have configured your back-end servers. This prevents the integration-related graphical user interface elements from appearing to end users.

To enable groupware integration:

1. Launch the Configuration Manager.
2. In the application list on the left, under Collaboration, click **Groupware**.
3. Under Enable Groupware with Collaboration, select **Enabled**.
4. Under General Groupware, select the type of groupware server you are using.
5. In the Server URL box, type the SOAP Server URL of the groupware server.
6. Click **SAVE**.

For more information on these fields and config.xml, see [“Working With Auto-Synchronization” on page 6-14](#).

## Setting Up User Accounts for Groupware Integration

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

1. Log in to the portal.
2. Click **My Account**.
3. Click **Collaboration Settings**.
4. Click **Calendar Synchronization**.
5. Enter the required account information.
6. 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 Groupware Integration Configuration File Settings

This section describes the settings for groupware integration contained in **config.xml**. Enable or disable groupware integration and configure groupware server settings using the Configuration Manager.

**Table 6-4 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	<p>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.</p>
addressBookReturn	<p>The maximum number of returned addresses from the address search operation.</p>
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>

**Table 6-4 config.xml Nodes for Groupware Integration**

Node or Attribute	Description
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 email 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

The Instant Messaging feature allows users who have been assigned the **Ability to View Instant Messaging Presence** activity right to see which project collaborators are currently logged in to their Yahoo! Instant Messaging client. For details on assigning activity rights to users, see [“Granting Activity Rights to Users” on page 4-11](#).

To integrate Yahoo! Instant Messaging with Collaboration complete the following procedures:

- [“Enabling Instant Messaging Integration” on page 6-17](#)
- [“Configuring Instant Messaging in config.xml” on page 6-18](#)

### Enabling Instant Messaging Integration

This section describes how to use the Configuration Manager to enable instant messaging integration.

To enable instant messenger integration:

1. Launch the Configuration Manager.
2. In the application list on the left, under Collaboration, click Collaboration Settings.
3. Under Enable Instant Messaging, select **Enabled**.
4. Click **SAVE**.

## Configuring Instant Messaging in config.xml

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

**Table 6-5 config.xml Nodes for Instant Messaging Integration**

Node or Attribute	Description
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 email 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 email 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 email 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:
  - a. Click **Edit** for the property.
  - b. 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.
  - c. 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.

## Integrating Collaboration and AquaLogic BPM

Collaboration can be integrated with AquaLogic BPM, allowing users to attach a Collaboration document to a WorkSpace process instance and then initiate the process from the document in the Collaboration UI.

To enable AquaLogic BPM integration:

1. Launch the AquaLogic Configuration Manager.
2. In the application list on the left, under Collaboration, click **Collaboration Settings**.
3. Under Enable ALBPM Integration, select **Enabled**.
4. Click **SAVE**.



The following table describes the nodes in config.xml that are used to enable integration with AquaLogic BPM:

**Table 6-6 config.xml nodes for AquaLogic BPM Workspace Extensions integration**

Node or Attribute	Description
ALIPIntegration enabled	This node is used to enable integration with AquaLogic BPM. Valid values are <b>yes</b> and <b>no</b> .
processPortletUUID	<p>The UUID for the Process - Application portlet. By default, the value is <b>E1F1B56E-0563-4397-9544-223AD1885C16</b>. You do not need to change this value.</p> <p>Only users with access to the Process - Application portlet are able to use the <b>Initiate Process</b> feature in Collaboration.</p>
requestTimeoutInMilliSecond	Specifies the amount of time, in milliseconds, that Collaboration waits to receive the names of available processes from AquaLogic BPM. If Collaboration does not receive these names in the specified amount of time, Collaboration stops waiting for process names. By default, the value is <b>60000</b> (60 seconds).

## Integrating Collaboration and AquaLogic Pathways

Collaboration can be integrated with AquaLogic Pathways, allowing users with the **Access Pathways** activity right to apply Pathways tags to Collaboration objects so that they can be searched on and accessed from within the Pathways UI.

To enable Pathways integration:

1. Launch the AquaLogic Configuration Manager.
2. In the application list on the left, under Collaboration, click **Pathways**.
3. Under Enable Pathways, select **Enabled**.
4. Under Pathways Communication, type the URL to Pathways in the **Pathways URL** text box:
  - a. From the Pathways Items or Pathways Users portlet click **Display in Pathways**.
  - b. Copy URL from the Address field of the browser.
  - c. Paste the URL in the **Pathways URL** text box.

5. Click **SAVE**.

# Integrating Collaboration and AquaLogic Interaction Analytics

Collaboration can be integrated with AquaLogic Interaction Analytics to send events to Analytics as a user is browsing and using Collaboration. This allows Analytics to have an accurate event data collection at any given time.

To enable Analytics integration:

1. Launch the AquaLogic Configuration Manager.
2. In the application list on the left, under Collaboration, click **Analytics**.
3. Under Enable Analytics, select **Enabled**.
4. Click **SAVE**.

For instructions on using the OpenUsage API to send Collaboration events to Analytics, see [Using the AquaLogic Interaction Analytics 2.0 OpenUsage API](#) on the BEA dev2dev site.

# Configuring Microsoft Project Import

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

**Table 6-7 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 Email a Project

This section describes how to configure the Email a Project feature. The Email a Project feature lets users:

- Email a message to a discussion within a project.
- Email 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 Email to Collaboration](#)

The “Relaying Email 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 Email 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 6-12. Additionally, the Notification Service -- which is used to generate and send email notifications from projects to users -- is not required to employ the Email a Project feature. However the Email a Project feature is less useful if the Notification Service is not running.

## Performing a Basic Configuration

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

To configure Collaboration to use the Email 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’ email address must be registered in their portal user profile.

Either the administrator or user can perform this task. The email address in the portal user profile must exactly match the user’s email 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 6-8 config.xml Nodes for Email a Project Configuration**

Node	Description
domain	The email 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 emails. The default value is 5.
maximum-message-size	The maximum size of incoming emails. <i>-1</i> 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 <i>-1</i> .
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 <i>*</i> , 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 Email to Collaboration

If you are running your email host on the same machine as Collaboration, you need to configure your email host to relay email to Collaboration. This section provides an example of configuring sendmail to relay email to Collaboration, which you can use as a guideline for configuring your own email 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 email 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 emails 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 emails 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 email and to use port 2525:

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

9. Restart Collaboration.

The **collaboration.log** file should show the Email 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 4.5 Build:198844.20050824 0720.0 SMTP Server (Messaging
Server) ready Wed, 24 Aug 2005 14:50:36 -0700 (PDT)
```

## Working With Collaboration Email Errors

If an error occurs when a user sends an email to a Collaboration project:

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

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



# Troubleshooting

This appendix lists common problems that may occur during Collaboration runtime.

# Troubleshooting Common Runtime Problems

**Table A-1 Common Runtime Problems and Solutions**

Problem Description and Details	Cause and Solution
<ul style="list-style-type: none"> <li>• <b>Problem:</b> Document content does not appear.</li> <li>• <b>Details:</b> In the Collaboration application, the list of documents in a project appears, but you cannot access the document links.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Cause:</b> In Configuration Manager, either the path to the Document Repository Service is incorrect or the port associated with the Document Repository Service is incorrect.</li> <li>• <b>Solution:</b> Edit the Document Repository Service component's settings in Configuration Manager. Enter the correct values into the Host and Port settings, then click <b>Save</b>.  To verify that the Document Repository Service is up and running, go to the Windows Command Prompt. Type the following command:  <code>Telnet &lt;Document_Repository_computer&gt; &lt;port_number&gt;</code>  If the Windows Command Prompt displays a blank screen with no errors, the Document Repository Service is up and running.</li> </ul>
<ul style="list-style-type: none"> <li>• <b>Problem:</b> Portlets time out.</li> <li>• <b>Details:</b> When you start Collaboration, the portlets time out and time-out errors display. These errors are most likely to occur when you start up Collaboration the first time after it is installed.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Cause:</b> The Java Server Pages (.jsp pages) in your application server were not precompiled before you started Collaboration for the first time.</li> <li>• <b>Solution:</b> The Collaboration portlets need to be refreshed. Refresh the page. If you are running Collaboration for the first time, you might need to refresh the page a couple of times, because the .jsp pages are compiled when Collaboration is first accessed.</li> </ul>
<ul style="list-style-type: none"> <li>• <b>Problem:</b> Portlets do not load.</li> <li>• <b>Details:</b> When you start up Collaboration, the Collaboration portlets do not start or fail to preload on startup. Various errors might display.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Cause 1:</b> The Web application server is not up and running.</li> <li>• <b>Solution 1:</b> Restart the Windows service named BEA Collaboration. Wait for two or three minutes to allow the application server to start, then refresh the page.</li> </ul>

**Table A-1 Common Runtime Problems and Solutions**

Problem Description and Details	Cause and Solution
	<ul style="list-style-type: none"> <li>• <b>Cause 2:</b> The port used to access the Web application server is incorrect.</li> <li>• <b>Solution 2:</b> Follow these steps: <ol style="list-style-type: none"> <li>1. In the Portal, click the <b>Administration</b> tab.</li> <li>2. Click the <b>Collaboration</b> administrative folder.</li> <li>3. Click <b>Remote Server</b>.</li> <li>4. Click the <b>Collaboration</b> remote server.</li> <li>5. Check that the base URL for Collaboration is correct. This URL should include the following information:  http://&lt;Collaboration_Computer_Name&gt;:  &lt;Application_Server_Port&gt;/collab  where:  &lt;Collaboration_Computer_Name&gt; is the name of the computer on which Collaboration is installed.  &lt;Application_Server_Port&gt; is the port number used by the Collaboration application server. You can find the HTTP and HTTPS port numbers that are used by Collaboration application server in Configuration Manager's Collaboration application, Application Settings component.</li> </ol> </li> </ul>
	<ul style="list-style-type: none"> <li>• <b>Cause 3:</b> A database exception occurred. For example, the application server cannot connect to the database.</li> <li>• <b>Solution 3:</b> Open the <b>collaboration.log</b> log file and look for any exceptions.</li> </ul>
	<ul style="list-style-type: none"> <li>• <b>Cause 4:</b> An exception occurred in the application server that resulted in Collaboration failing to start up. In the application server log file, a "failed to preload on startup" error displays.</li> <li>• <b>Solution 4:</b> Restart the Windows service named <b>BEA ALI Collaboration</b>.</li> </ul>

**Table A-1 Common Runtime Problems and Solutions**

Problem Description and Details	Cause and Solution
<ul style="list-style-type: none"> <li>• <b>Problem:</b> A Database Role-Reconciliation Error Occurs.</li> <li>• <b>Details:</b> A database role-reconciliation error occurs, and Collaboration cannot connect to the portal database.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Cause:</b> The wrong value was specified in the Configuration Manager, Collaboration application, Collaboration Settings component, <b>Linked database alias</b> setting.</li> <li>• <b>Solution:</b> To find the correct value that should you should type into the Linked database alias setting: <ul style="list-style-type: none"> <li>– <b>Oracle:</b> Navigate to Configuration Manager, Portal Service application, Portal Database component. The value you should type into the Linked database setting is specified in the <b>User name</b> setting.</li> <li>– <b>MSSQL:</b> Navigate to Configuration Manager, Portal Service application, Portal Database component. The value you should type into the Linked database setting is specified in the <b>User name</b> setting. Add <i>.dbo.</i> to the end of the user name value. For example, if the user name is <i>alidbuser</i>, the value that you type into the Linked database alias setting should be <i>alidbuser.dbo</i>.</li> <li>– <b>DB2:</b> Navigate to Configuration Manager, Portal Service application, Portal Database component. The value you should type into the Linked database setting is specified in the <b>User name</b> setting.</li> </ul> </li> </ul> <p>In Configuration Manager, navigate to the Collaboration application, Collaboration Settings component, <b>Linked database alias</b> setting. Type the correct value, then click <b>Save</b>.</p>
<ul style="list-style-type: none"> <li>• <b>Problem:</b> Error 400 Page from Notify</li> <li>• <b>Details:</b> Links from Notify mail return an Error 400 page.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Cause:</b> This occurs when the portal and Collaboration are running on the same port on the same machine.</li> <li>• <b>Solution:</b> Ensure that Collaboration and portal are running on different ports or on different machines.</li> </ul>
<ul style="list-style-type: none"> <li>• <b>Problem:</b> Grant Rights and Portal vs. System User</li> <li>• <b>Details:</b> If you use SQL Plus through Enterprise Manager, grant rights scripts fail.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Cause:</b> The Collaboration or portal user does not have the proper grant rights.</li> <li>• <b>Solution:</b> If using Enterprise Manager, run grant rights scripts as an Oracle system user rather than a portal user.</li> </ul>

**Table A-1 Common Runtime Problems and Solutions**

Problem Description and Details	Cause and Solution
<ul style="list-style-type: none"> <li>• <b>Problem:</b> Invalid URLs for Experience Definitions appear in Notification Emails.</li> <li>• <b>Details:</b> When a user clicks on a URL for an Experience Definition in a Notification email, they are taken to a previous version of the Experience Definition.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Cause:</b> Experience Definition URLs include user-specific fragments that preserve the correct look and feel of Experience Definitions for individual users. These URLs are cached by the Notification Service. If a portal user changes his or her login domain, the cached Experience Definition URLs for that user become invalid. There are other, less-common reasons why Experience Definition URLs can become invalid. If you are experiencing the same problem for a different reason, restarting the Notification Service will most likely resolve the problem for you, too.</li> <li>• <b>Solution:</b> Restart the Notification Service.</li> </ul>
<ul style="list-style-type: none"> <li>• <b>Problem:</b> Error message appears when user tries to access Collaboration Administration, pages, or portlets.</li> <li>• <b>Details:</b> See <a href="#">Troubleshooting Error Message</a> for the error message that appears.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Cause:</b> You did not restart the portal after scripting the Collaboration database.</li> <li>• <b>Solution:</b> Restart the portal. If restarting the portal does not resolve the issue, make sure that the portal's tables are owned by the portalduser, and Collaboration's tables are owned by the collabdbuser -- not dbo.</li> </ul>

## Troubleshooting Error Message

Following is the error message that corresponds to the last Troubleshooting problem in the above table:

```
java.lang.NoClassDefFoundError

at com.plumtree.collaboration.api.portalaccess.PortalAccessManager.
getGuestPortals(PortalAccessManager.java:279)

at com.plumtree.collaboration.api.portalaccess.PortalAccessManager.
fillMap(PortalAccessManager.java:388)
```

## Troubleshooting

# 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 Configuration Files](#)
- [config.xml](#)
- [documentTemplates.xml](#)
- [filetypes.xml](#)
- [database.xml](#)

## Overview of Collaboration 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 B-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 <i>install_dir</i> \ptcollab\4.5\settings\config, where <i>install_dir</i> is, by default, C:\bea\alui. For more information, see <a href="#">“config.xml” on page B-3</a> .
documentTemplates.xml	Sets the document templates that are recognized by Collaboration. By default, it is installed in <i>install_dir</i> \ptcollab\4.5\settings\config, where <i>install_dir</i> is, by default, C:\bea\alui. For more information, see <a href="#">“documentTemplates.xml” on page B-12</a> .
filetypes.xml	Lists file types in Collaboration. By default, it is installed in <i>install_dir</i> \ptcollab\4.5\settings\config, where <i>install_dir</i> is, by default, C:\bea\alui. For more information, see <a href="#">“filetypes.xml” on page B-13</a> .
database.xml	Configures Collaboration database settings. The configuration file is automatically updated during the installation of Collaboration. By default, it is installed in <i>install_dir</i> \ptcollab\4.5\settings\config, where <i>install_dir</i> is, by default, C:\bea\alui. For more information, see <a href="#">“database.xml” on page B-16</a> .
dr.xml	Configures the connection to the Document Repository Service. By default, it is installed in <i>install_dir</i> \ptcollab\4.5\settings\config, where <i>install_dir</i> is, by default, C:\bea\alui.  <b>Note:</b> dr.xml is automatically updated during the installation of Collaboration. Do not modify this file.
audit.xml	Controls the logging and profiling functionality of Collaboration. By default, it is installed in <i>install_dir</i> \ptcollab\4.5\settings\config, where <i>install_dir</i> is, by default, C:\bea\alui.  <b>Note:</b> The contents of this file are generated by Collaboration. They should not be modified.



**Table B-1 Collaboration Configuration Files**

Collaboration Configuration File	Description
cache.xml	<p>Manages Collaboration caches. By default, it is installed in <i>install_dir</i>\ptcollab\4.5\settings\config, where <i>install_dir</i> is, by default, C:\bea\alui.</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 <i>install_dir</i>\ptcollab\4.5\settings\config, where <i>install_dir</i> is, by default, C:\bea\alui.</p>
object-migration.xml	<p>Controls object migration in Collaboration. By default, it is installed in <i>install_dir</i>\ptcollab\4.5\settings\config, where <i>install_dir</i> is, by default, C:\bea\alui.</p> <p><b>Note:</b> The contents of this file are generated by Collaboration. They should not be modified.</p>

For information on creating, editing and deleting holidays, see [“Creating, Editing and Deleting Holidays” on page 3-9](#)

## 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 B-2 Nodes in config.xml**

Node	Description
portal version	Displays the version of the owning portal.
audit	Filename of the audit runtime configuration file.
database	Filename of the database connectivity configuration file.
cache	Filename of the managed cache configuration file.

**Table B-2 Nodes in config.xml**

<b>Node</b>	<b>Description</b>
search enabled	Enables and disables communication between Collaboration and the Search Server. Valid values are <b>yes</b> and <b>no</b> .
servername	The host name of the Search Server. This value should be a fully-qualified domain name.
port	The port where the Search Server listens for communication.
defaultLanguage	The default language of the Search Server.
languages_dir	The pathname to the location where language information is stored by the Search Server.
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 Server.
temp_dir	The pathname of the temporary directory used by the Search Server.
enableLogging	Enables and disables Search Server 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.
fileTypeRegister	Filename of the filetypes configuration file.
maxUploadMegaBytes	The maximum size for a single file upload.
temporaryZipFolder	
bulkUpload	Enables and disables the Bulk Upload feature. Valid values are <b>yes</b> and <b>no</b> .

Table B-2 Nodes in config.xml

Node	Description
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 Office uses to communicate with Collaboration. This attribute is used if enable is set to <b>true</b>.</p> <p><b>Note:</b> This value is set by Configuration Manager and should not be updated by editing config.xml directly.</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 (also known as <i>load balancing</i>) 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>
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/load balancing are enabled.</p> <p><b>Default:</b> 30</p>
webEdit	<p>Enables or disables WebEdit. Valid values are <b>yes</b> and <b>no</b>.</p>

**Table B-2 Nodes in config.xml**

<b>Node</b>	<b>Description</b>
nonGatewayed Access	<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>Note:</b> This value is set by Configuration Manager and should not be updated by editing config.xml directly.</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>
fileSpec	<p>Specifies the name of the distribution file and information about the component.</p> <p><b>Note:</b> This value should not be modified unless a more recent version of the object needs to be deployed.</p>
installOfficeToolsPopUp	<p>Enables or disables the Collaboration Office Tools Add-In installer. Valid values are <b>yes</b> and <b>no</b>.</p>
webDAV	<p>Contains WebDAV settings.</p>
fullWebDAVAccessToThisServer	<p>Enables or disables the use of WebDAV. Valid values are:</p> <p><b>yes:</b> Causes Collaboration to accept WebDAV requests. This is the default.</p> <p><b>no:</b> Causes Collaboration to reject WebDAV requests.</p>
requestsAreGatewayed	<p>Enables or disables WebDAV communication between Windows Explorer and Collaboration. Valid values are <b>true</b> and <b>false</b>.</p>
uiDisplaysServerConfigInfo	<p>Controls how Collaboration displays the <b>New   Web Folder</b> dialog in the <b>Documents</b> tab. Valid values are:</p> <p><b>yes:</b> Displays the Web Folder dialog box. This is the default.</p> <p><b>no:</b> Does not display the Web Folder dialog box.</p>

Table B-2 Nodes in config.xml

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> Causes 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> <p>This value is set by Configuration Manager and should not be updated by editing config.xml directly.</p>
imageServer	Specifies the relative paths to the directories in the 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.

**Table B-2 Nodes in config.xml**

<b>Node</b>	<b>Description</b>
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> .
cache-subscriptions	Increases the efficiency of the Notification Service by caching subscriptions every hour. Valid values are <b>yes</b> and <b>no</b> . Default is yes. We recommend that you keep this setting enabled unless your system has a performance or memory issue.
host	The host of the Notification Service.
port	The port where the Notification Service listens for communication.
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	Configured through Configuration Manager.
password secure	Indicates whether or not the owning portal password is encrypted (and secure). If you are using an encrypted password, set to <b>yes</b> .  Valid values are:  <b>yes:</b> Indicates that the owning portal password is encrypted and secure.  <b>no:</b> Indicates that the owning portal password is not encrypted and not secure.
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.
collaboration-remote-server-uuid	Do not modify this value.

**Table B-2 Nodes in config.xml**

<b>Node</b>	<b>Description</b>
collaboration-web-service-uuid	Do not modify this value.
collaboration-config-web-service-uuid	Do not modify this value.
collaboration-remote-datesource-uuid	Do not modify this value.
cluster	Enables and disables clustering. Valid values are <b>yes</b> and <b>no</b> .
http-caching application-view	Enables and disables caching of http requests to increase efficiency of application views. Valid values are <b>yes</b> and <b>no</b> .
portlet-enabled	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.
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.

**Table B-2 Nodes in config.xml**

<b>Node</b>	<b>Description</b>
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>
auto-create-community project	<p>Valid values are:</p> <p><b>yes:</b> Causes Collaboration to automatically create community projects on Community pages.</p> <p><b>no:</b> Disables automatic create community project functionality.</p>
groupware	This node is used to configure groupware integration. Enabled and server settings are configured through Configuration Manager.
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.



**Table B-2 Nodes in config.xml**

Node	Description
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	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	Instant messaging is enabled through Configuration Manager.
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 email 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 email address of the individual user.
presence-poll-interval	This node includes the number of seconds between presence polls.
ALIPIntegration	AquaLogic BPM integration is enabled through Configuration Manager.
processPortletUUID	The UUID for the Process - Application portlet. By default, the value is <b>E1F1B56E-0563-4397-9544-223AD1885C16</b> . You do not need to change this value.
requestTimeoutInMilliSecond	Specifies the amount of time, in milliseconds, that Collaboration waits to receive the names of available processes from AquaLogic BPM Workspace Extensions. If Collaboration does not receive these names in the specified amount of time, Collaboration stops waiting for process names. By default, the value is <b>60000</b> (60 seconds).
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.

**Table B-2 Nodes in config.xml**

Node	Description
expand-tasklists-by-default	Displays expanded tasklists by default. Valid values are <b>yes</b> and <b>no</b> . When disabled, only root tasks appear in tasklists by default.
email	Email a project is enabled through Configuration Manager.
connection-pool	The number of socket handlers for incoming connections.
mail-processors	The number of threads devoted to processing incoming emails.
maximum-message-size	The maximum size of incoming emails. <i>-1</i> indicates that Collaboration does not perform size checks. When this is the case, the Collaboration API enforces size limits for message bodies and files.
enable-summary-list	This node is used to expose the email summary list feature through the UI. This feature is not supported. Valid values are <b>true</b> and <b>false</b> .
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 B-3 Nodes in documentTemplates.xml**

Node	Description
templateFile cache	The name of the file located in <i>install_dir\ptcollab\&lt;version&gt;\settings\documentTemplates</i> . 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 B-4 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> .
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> .

Table B-4 Nodes in filetypes.xml

Node	Description
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.
imageFile	The name of the file icon in <i>install_dir\ptimages\imageserver\plumtree\collab\private\img</i>
shortcutImageFile	The name of the file shortcut icon in <i>install_dir\ptimages\imageserver\plumtree\collab\private\img</i>

**Table B-4 Nodes in filetype.xml**

Node	Description
templateImageFile	The name of the file template icon in <i>install_dir\ptimages\imageserver\plumtree\collab\private\img</i> .
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 able to be WebEdited. Unless serious modifications are made to the code, only Microsoft Office applications are able to be WebEdited. 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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