How To... Configure the Who is Who iView

Applicable Releases:

SAP NetWeaver 7.0

IT Practice:

User Productivity Enablement

IT Scenario :

Enterprise Knowledge Management

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Document History

Document Version	Description
1.10	A limitation added
1.00	First official release of this guide

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1. Business Scenario

You want to create an iView where the users should be able to search for other portal users and their profiles (address, phone, Job Title,…) within the user persistence.

This Guide describes How-to Configure a TREX based User-Search. As you can verify, this guide is dealing with cross issues like TREX, PCD and KM. From the technical point of view, the following actions will be performed:

- Indexing the UME-Repository

- Defining an Option Set for the Search-Result-List

- Verify the Search-Result Layout Set

- Configure the WhoisWho-iView

- Possible business scenario (additional information)

2. Prerequisites and Limitations

Background of this guide was the idea to implement a Portal-User-Directory in an easy way, with the default content and without customer development. This User-Directory should be implemented in a role where the user is also able to perform a simple Self Service for its own, like maintaining the profile, administer the contacts and upload a user photo. The detailed description of this role is maintained in the chapter 4 'Additional Information'.

This scenario is based on an example where the customers need is to configure a User-Search-iView (WhoisWho) and also to display the search-results (Users) in an appropriate way.

You need the role of a super administrator in order to carry out the tasks described in this guide.

Please also consider the following prerequisites respectively limitations:

- TREX is installed and configured for KMC

- TREX index for LDAP is only complete if LDAP property MAXHITS is larger than number of users in LDAP (this setting has to be recognized for customers using an MS ADS or LDAP for their user persistence, TREX will only index until the MAXHITS-number is reached).

  ### 🔔 Note
  This limitation ends with NW2004S SP06.

- For user resources coming from an LDAP, the property {http://sapportals.com/xmlns/cm} modified is missing. Therefore you have to provide an appropriate mapping from LDAP property to User property in UME configuration xml file (see note 1239132). Otherwise changes of user data won't be recognized and updated in the index.

- Works only on UME principal types (Verify the principle types under *System Administration → System Configuration → Knowledge Management → Content Management → Repository Managers → UME Object Settings → UME Principals*)

- TREX index on all users might impose a security risk.

- „Like Search" without wildcards is not possible.

- No further navigation in search result list.

- Scheduler-Task for Index has to be defined (if a new user is added or properties from a user get changed, there is no event created for the index management. To keep the user-directory up to date, it is needed to perform a scheduled incremental update regularly for the index).

- Service-Users will be also retrieved (the EP uses some service-users to perform tasks in the background, like index_service. These users are no dialog-users).

3. Step-by-Step Procedure

The steps 3.1 to 3.4 show you the needed processes you have to perform to implement this scenario. Each step builds up on the step before so please fulfill the required tasks one after another to avoid problems or misunderstandings

3.1 Creating the index

This step describes how you can define the needed user index, which is needed to retrieve the maintained user data.

1. Open *System Administration → System Configuration → Knowledge Management → Content Management → Index Administration*

2. Choose 'Create' and insert the following properties:

    ID   = ume

    Name   = ume

    Group (Add)   = UME

    Service   = SearchItems to Index = Documents

    Enter a custom property „searchhidden" with value „true" and choose „Add":

    Searchhidden   =   true
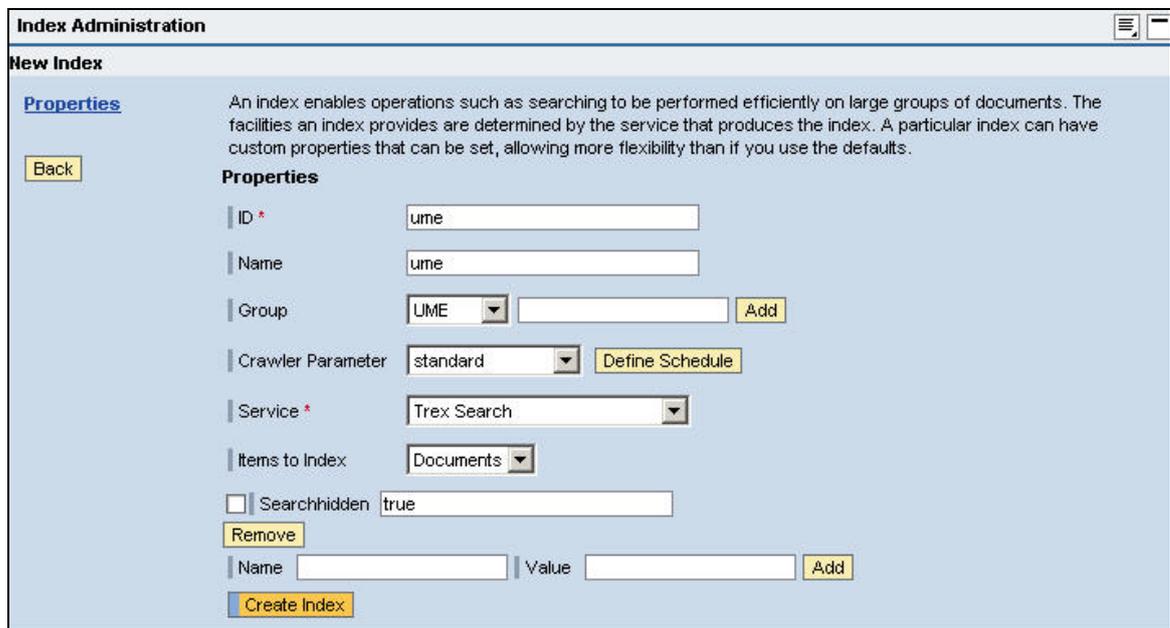
Figure 1: Creating the Index Properties

3. Choose 'Create Index'

4. Go to Data Sources and choose 'Add'. Assign the following data source to the index:

    Root – ume – Users

5. Choose 'Save'

3.2 Creating a Search Option Set

The following steps describe how you can modify the Search Options Set. The Options Set allows you to define in detail which search parameters are used for the search and which are displayed in the Search Options. In Figure 2 you can see a modified User-Search iView where only a certain index and other special search parameters are displayed.

Figure 2: Modified Search-iView

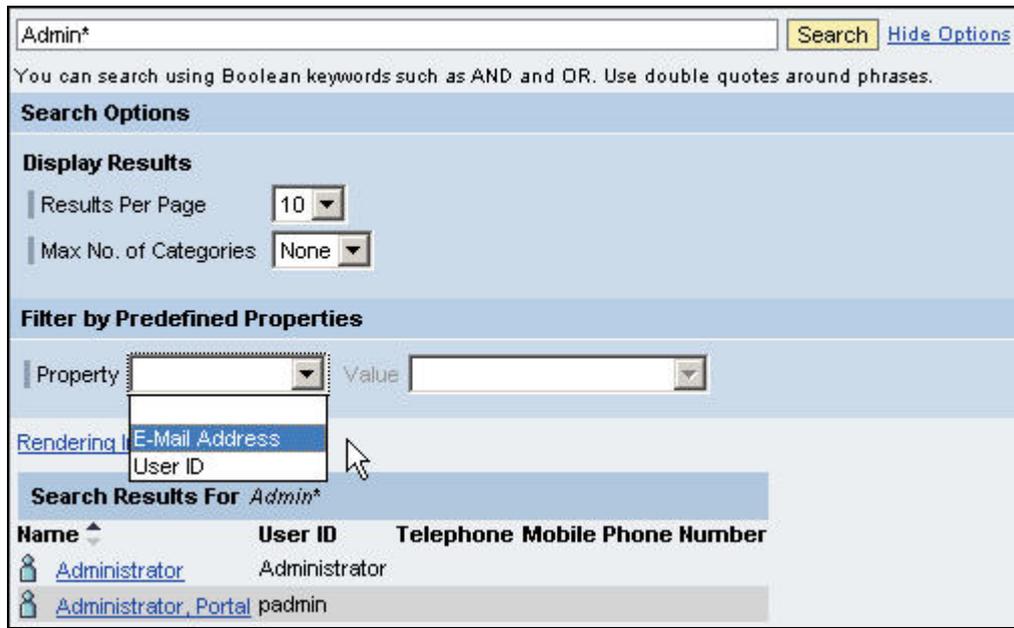In this example we want to define the User-Search-iView like it is displayed in Figure 2. This means we have the following requirements:

- Only the ume-Index is used in this search

- The additional 'search-options' shall be displayed initially

- No selection for the Index/Groups or Folders

- Disable Standard Properties and Custom properties

- Enable Predefined Properties (Enable an attribute-search)

- Enabling correct Sorting of Search Results:

    o Define cm_displayname_as_string as Default Property for Sorting. Choose cm_displayname_as_string as the only Allowed Sort Property.

Note

This is recommended (see Note 891776) to have a consistent sorting behaviour. Initially the search results are sorted by display name considering the complete search result. For later - manual triggered - column sorting all entries displayed in the pager are considered.

To create a Search Options Set performs the following steps:

1. Open *System Administration → System Configuration → Knowledge Management → Content Management*

2. Make sure that the advanced view is activated in the Configuration iView. You can check this via Mode – Advanced in the menu bar. (The advanced view displays all configuration classes and parameters.)
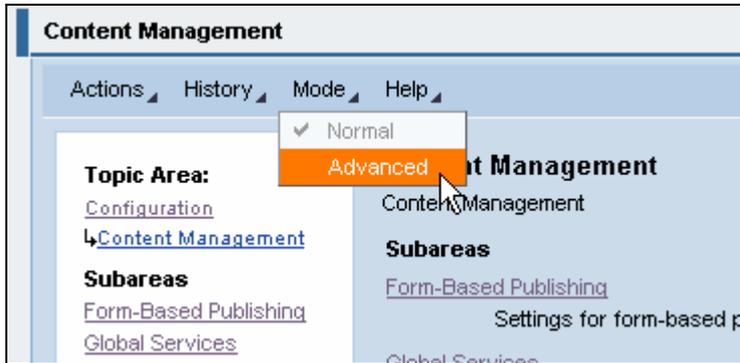
Figure 3: Change to Advanced Mode

3. Go to *User Interface → Search → Search Options Set*

4. Choose UISearch and Duplicate it and enter a name for your new Options Set (e.g. UserDetails)

5. Edit your Options Set with the following parameter:
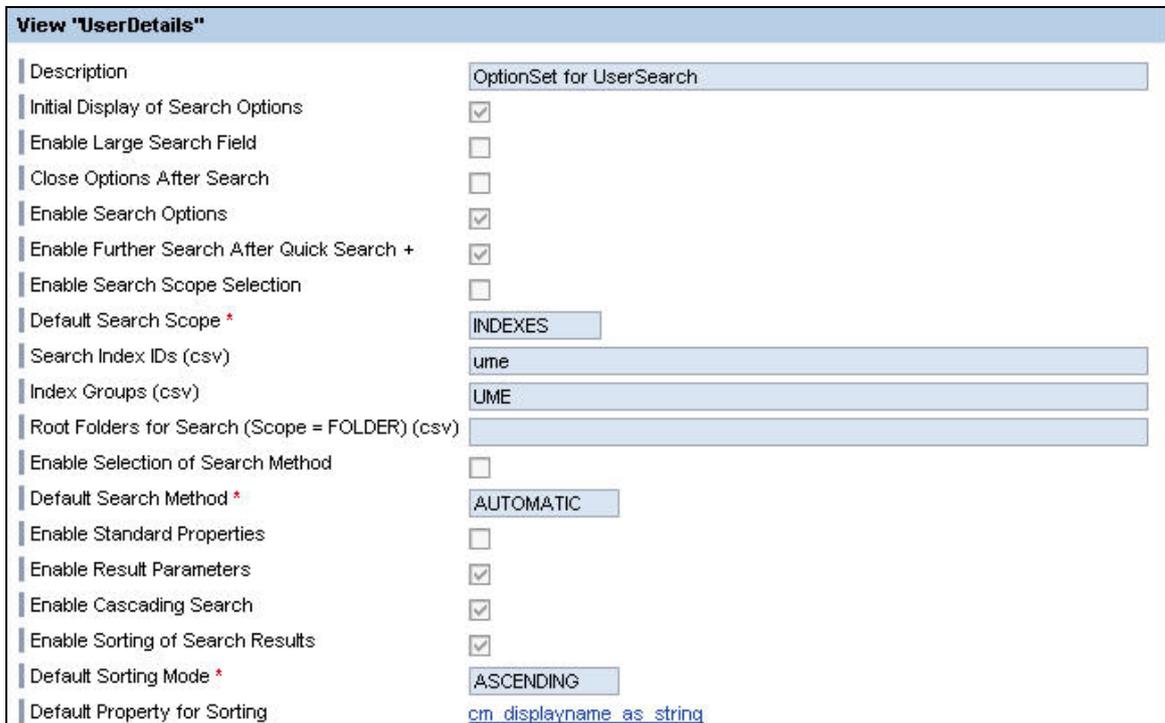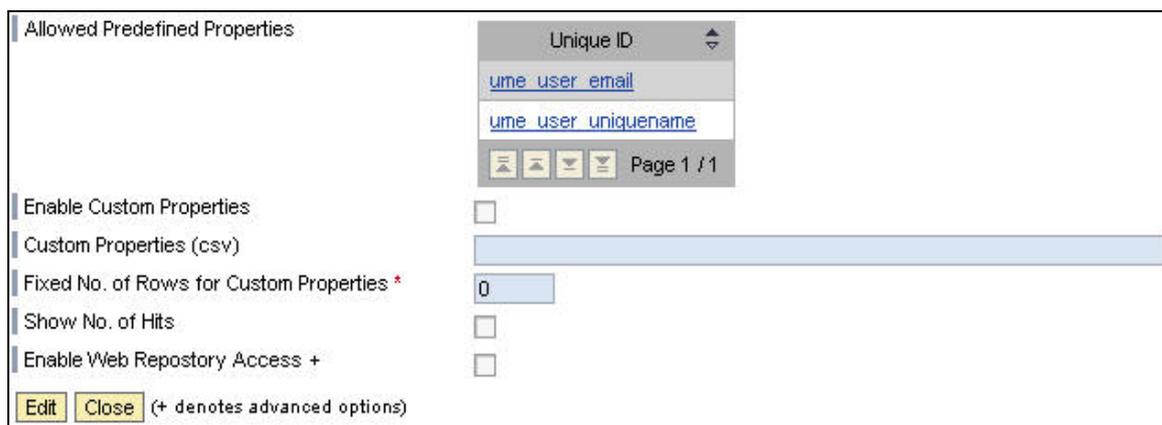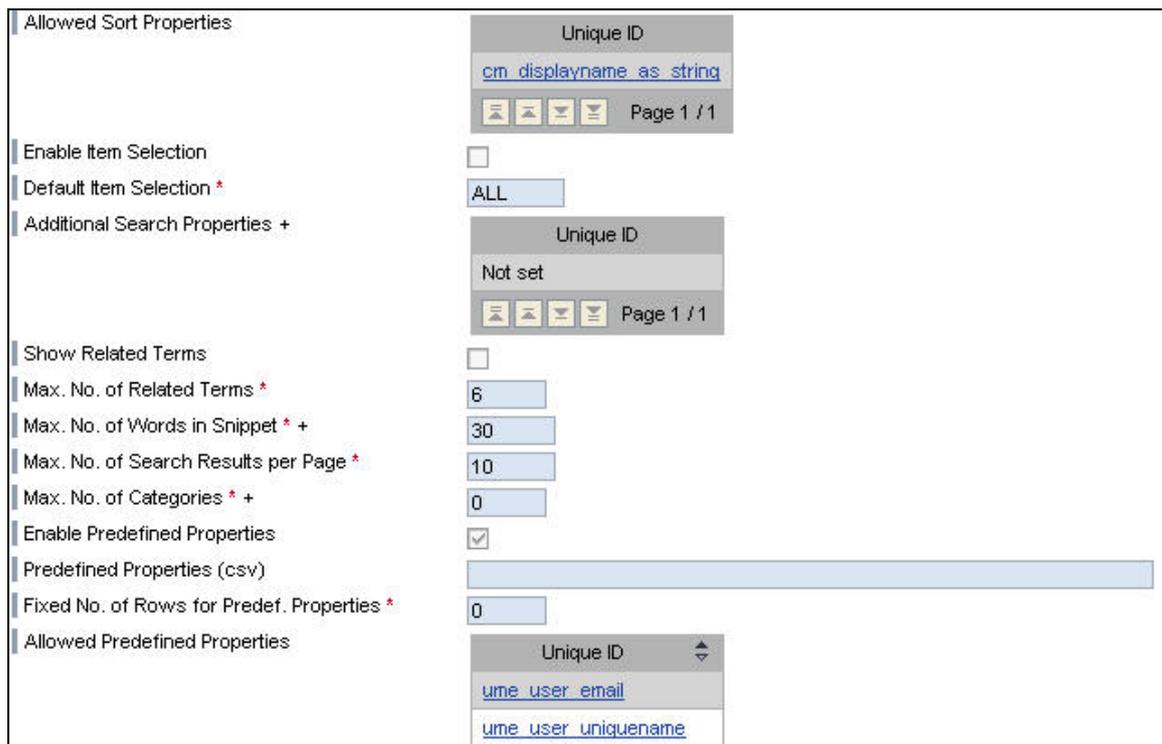
Figure 4: Settings for the Options Set

6. Under Allowed Predefined Properties, choose the properties you also want to search for.

   - You can verify these properties via *Global Services → Property Metadata → Properties*

   - Please filter the properties by performing a search for ume*

   - All ume*-properties with the flag 'indexable' can be used in the Options Set within the Predefinded Properties

   - You can also choose own custom attributes – therefore please see the homepage of the How-To-Guides (http://service.sap.com/nw-howtoguides) → How to Extend User Details

7. Save your changes

3.3 Verify the existing Layout Sets for the Search Result List

Without defining a special Layout Set for the Search Results (=Users) we will receive an inadequate Search Result List, as the default information for rendering Results is used. You can verify this in Figure 5 that this View as a Users-Result List shall not appear. (E.g. Open Folder, Details, Html Version, no context menu…).

Figure 5: Rendering Information without a defined Layout Set

There are two default existing Layout Sets which can be used for rendering the User-Information. These two Layout Sets are called *WhoIsWhoLayoutSet* and *WhoIsWhoNarrowLayoutSet*. You can find them under the following navigation structure:

System Administration → System Configuration → Knowledge Management → Content Management → User Interface → Settings → Layout Set

In the next step we will use the default Layout Set: *WhoIsWhoLayoutSet*

3.4 Creating the User-Search-IView

The following chapter combines all the previous task which has been performed before. The Intention now is to create an explicit search-IView for the User-Search.

1. Open Content Administration → PortalContent

2. Navigate to your custom folder where you can create PCD-Objects

3. Right-Click on your folder and choose New iView

4. Select **KM Search iView** and enter the general properties for the iView. After that please open the iView for editing.

   General Properties:

   iView Name   =   UserSearch

   iView ID   =   UserSearch

   iView ID Prefix   =   com.customer

   Description   =   WhoisWho-iView

5. In the *'Edit-Mode'* please choose in the dropdown-box '*Property Category'* and the value '*Show All'.*

6. Please verify that the following attributes for the iView are maintained with the following values:

   Overrule Search Configuration   =   No

   Search Options Set   =   UserDetails

   Search Result Layout Set   =   WhoIsWhoLayoutSet

7. Please save your changes and perform a preview of the created iView afterwards.
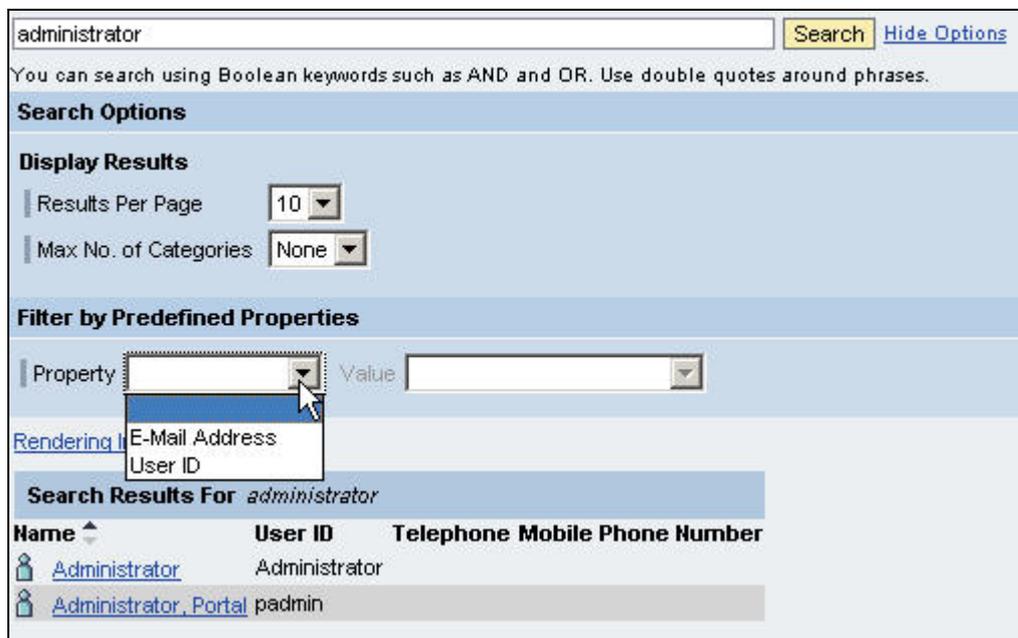
Figure 6: Rendering Information with defined Layout Set

As you can verify in Figure 6, the Result List is rendered with the needed User Information like User ID, Telephone and also a context menu with collaborative commands can be used.

Also own defined attributes like 'Expert Area' and 'Skills' (see How to Guide Extend User-Details) can be displayed (defined in the Layout Set) and it is possible to search for these predefined properties too.

4. Additional Information

This chapter is used for additional information concerning the whole business-scenario beside this How to Guide.

As already addressed in Chapter 2, the background for this How to Guide was the intention of a User Self Service-Role which can be created. The 'Collaboration-Demo'-Role already contains parts of the described scenario and can be used as an example. Based on this role the user should be able to use the complete collaborative functionality to find, use and store user based-information in an easy way. Also the user should be able to maintain its own data on that point of entry.

Therefore some examples for the user's intention to use such a scenario:

4.1 Portal-User-Search

This Page (iView) was explained within this How-to-Guide (WhoisWho). The user gets the possibility to use this page as kind of PortalUser-Directoy. The result-list displays the users in a appropriate way and with the context menu, the user is able to collaborate within the result list. (Figure 6)

Example 1: (find and use)

The user A is looking for a certain employee getting general user-information. Also the user wants to know if this user is online to interact or the user is on vacation.
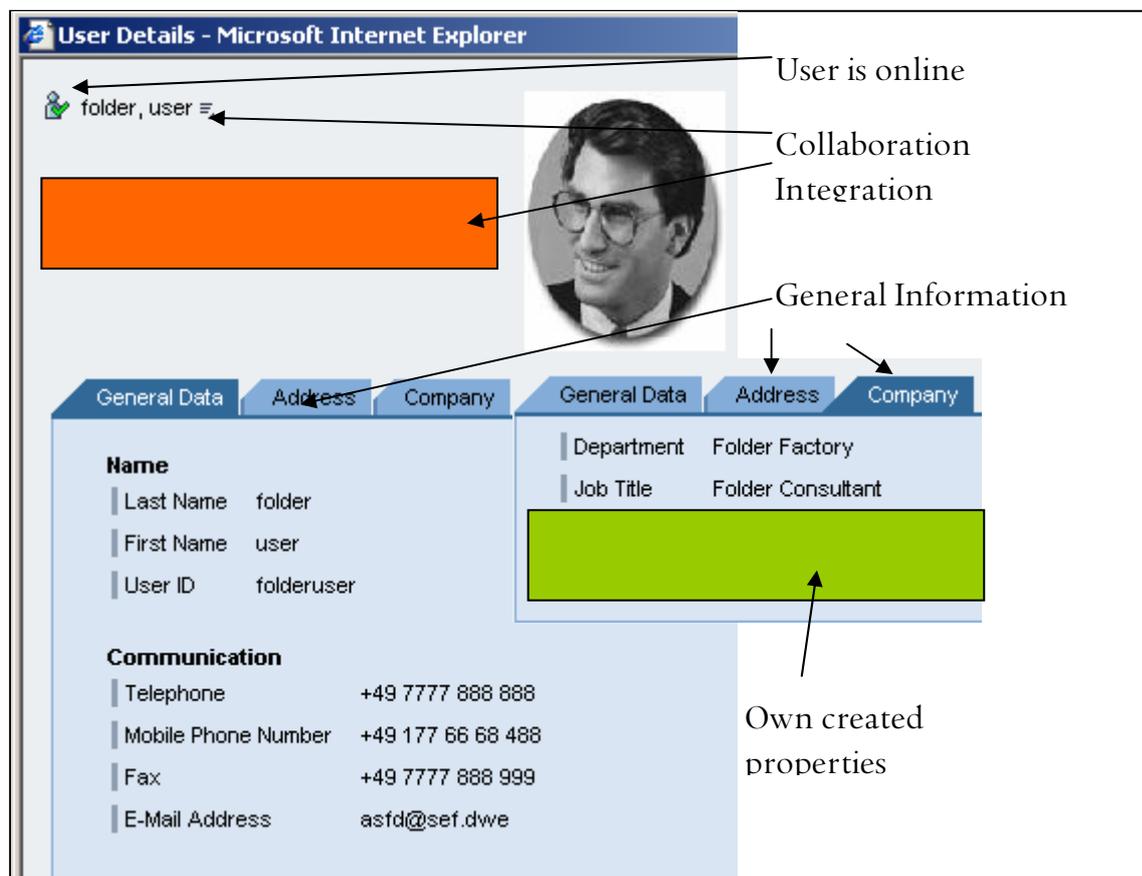

Figure 7: User-Details-Dialog with user information

Example 2: (find and use)

The user A needs information about a special topic (e.g. EP-KM). Therefore the user wants to search for dedicated employees who are experts in this area.

Figure 8: User-Search-Page with Result List

4.2 Contact List

This page is based on the Collaboration Launch Pad – iView. Within this View (Page) the user is able to maintain its contacts and to use the default collaboration-functionality.

Example 3: (store)

The user A retrieved the relevant user and is now able to store this user information within its contact list.

The iView is based on portalarchive (par) ***com.sap.netweaver.coll.shared.ui*** and the component ***CollaborationLaunchPad.***

Figure 9: Collaboration-Launch-Pad

4.3 Profile Maintenance

Within the Profile-Maintenance-Page the user is able to administrate its Profile and also to upload its photo. This Page contains two iViews.

Example 4: (maintain own data)

The user A recognizes that its own profile needs to be updated. Also he wants to change its photo.

The Maintenance of the own profile can be done with Personalize -> User Profile

1. UserProfile based on par **com.sap.portal.usermanagement.admin** with component **UserProfile** (Figure 10):

Figure 10: UserProfile

2. PhotoUpload based on par **com.sap.netweaver.kmc.people** with component **ChangePhoto**.

⬆ **Tip**

In the iView-Properties there is an attribute 'Administrative Mode' with the values 'YES' and 'NO'. For the 'normal' portal-user please choose 'no'. (Figure 11)
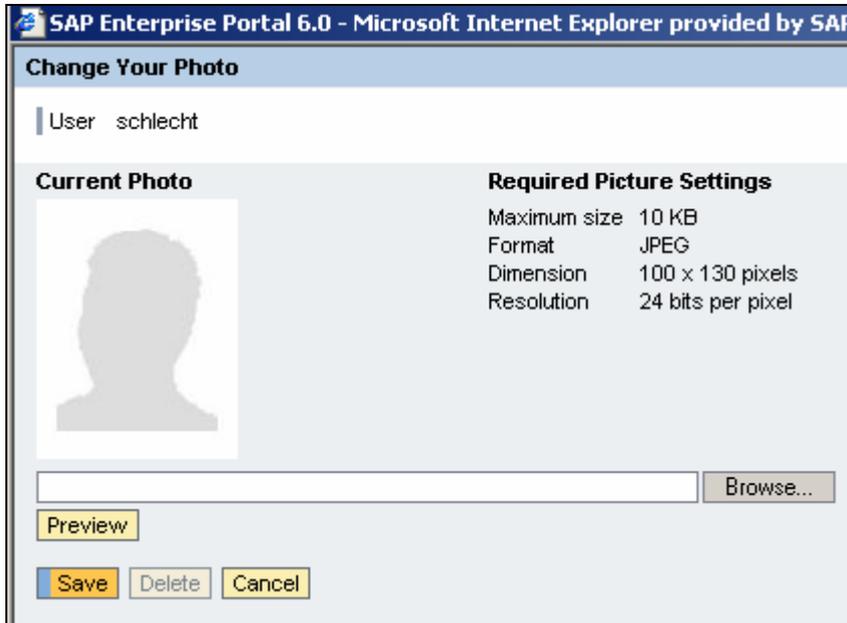

Figure 11: User Photo Maintenance (Self Service)

3. The 'Administrative Mode' with value 'YES' enables the iView to search for different portal users and upload the photo for them. This iView should only be used from a user administrator. (Figure 12)
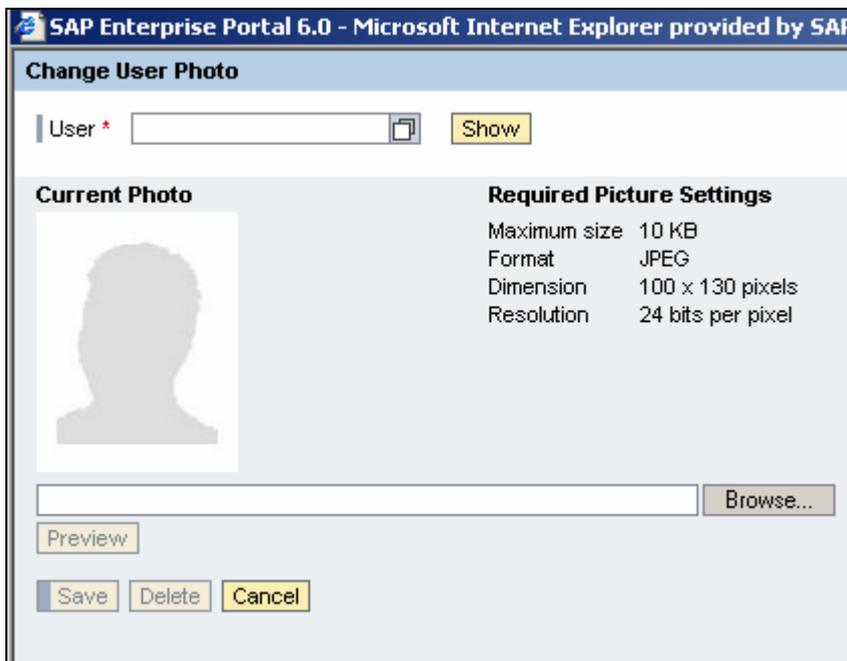

Figure 12: User Photo Maintenance (Administration)

www.sdn.sap.com/irj/sdn/howtoguides