

**How-to Guide
SAP NetWeaver '04**



How To... configure the WhoisWho- iView

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1 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 userphoto. 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 userpersistence, TREX will only index until the MAXHITS-number is reached).
Please Note! This limitation ends with Netweaver04 SPS15 and NW2004S SP06.
- 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 indexmanagement. 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 The Step By Step Solution

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	=	Search
Items to Index	=	Documents

enter a custom property „searchhidden“ with value „true“ and choose „Add“:
Searchhidden = true

Index Administration

New Index

Properties

An index enables operations such as searching to be performed efficiently on large groups of documents. The facilities an index provides are determined by the service that produces the index. A particular index can have custom properties that can be set, allowing more flexibility than if you use the defaults.

Properties

ID *

Name

Group

Crawler Parameter

Service *

Items to Index

Searchhidden

Name Value

Figure01: 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 Figure02 you can see a modified User-Search iView where only a certain index and other special search parameters are displayed.

The screenshot shows a search interface with the following elements:

- Search input field containing "Admin*" and buttons for "Search" and "Hide Options".
- Instructional text: "You can search using Boolean keywords such as AND and OR. Use double quotes around phrases."
- Search Options** section:
 - Display Results**: "Results Per Page" set to 10, "Max No. of Categories" set to None.
 - Filter by Predefined Properties**: A "Property" dropdown menu is open, showing "E-Mail Address" and "User ID". A "Value" dropdown menu is also present.
- Search Results For Admin*** table:

Name	User ID	Telephone	Mobile	Phone Number
Administrator	Administrator			
Administrator, Portal	padmin			

Figure02: Modified Search-iView

In this example we want to define the User-Search-iView like it is displayed in Figure02. 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:
 - 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 displayname 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.)

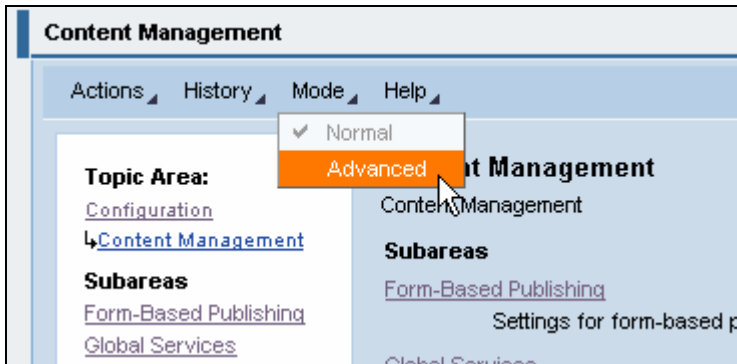
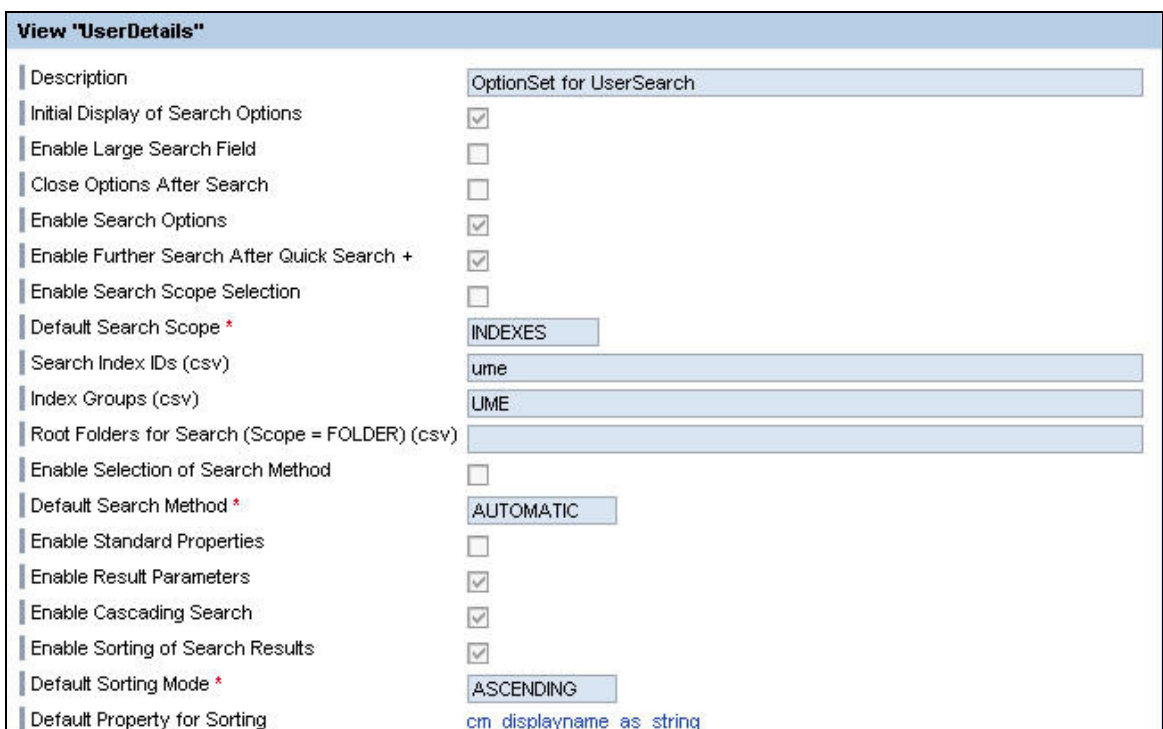


Figure03: Change to Advanced Mode

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:



Allowed Sort Properties	<div style="border: 1px solid gray; padding: 2px;"> <p style="text-align: center;">Unique ID</p> <p>cm_displayname as string</p> <p style="text-align: right;">Page 1 / 1</p> </div>
Enable Item Selection	<input type="checkbox"/>
Default Item Selection *	ALL
Additional Search Properties +	<div style="border: 1px solid gray; padding: 2px;"> <p style="text-align: center;">Unique ID</p> <p>Not set</p> <p style="text-align: right;">Page 1 / 1</p> </div>
Show Related Terms	<input type="checkbox"/>
Max. No. of Related Terms *	6
Max. No. of Words in Snippet * +	30
Max. No. of Search Results per Page *	10
Max. No. of Categories * +	0
Enable Predefined Properties	<input checked="" type="checkbox"/>
Predefined Properties (csv)	
Fixed No. of Rows for Predef. Properties *	0
Allowed Predefined Properties	<div style="border: 1px solid gray; padding: 2px;"> <p style="text-align: center;">Unique ID</p> <p>ume_user_email</p> <p>ume_user_uniquename</p> </div>

Allowed Predefined Properties	<div style="border: 1px solid gray; padding: 2px;"> <p style="text-align: center;">Unique ID</p> <p>ume_user_email</p> <p>ume_user_uniquename</p> <p style="text-align: right;">Page 1 / 1</p> </div>
Enable Custom Properties	<input type="checkbox"/>
Custom Properties (csv)	
Fixed No. of Rows for Custom Properties *	0
Show No. of Hits	<input type="checkbox"/>
Enable Web Repository Access +	<input type="checkbox"/>
<input type="button" value="Edit"/> <input type="button" value="Close"/> (+ denotes advanced options)	

Figure04: 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 Predefined 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 you 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 Figure05 that this View as a users' result list shall not appear. (E.g. Open Folder, Details, HTML Version, no context menu...).

The screenshot shows a search interface with the following sections:

- Search Options**
 - Display Results**
 - Results Per Page: 10
 - Max No. of Categories: None
 - Filter by Predefined Properties**
 - Property: [] Value: []
- Rendering Information**
- Search Results For a***
 - action_inbox_service** (98%)
 - uniqueusername: action_inbox_service
 - 0 Bytes [HTML Version](#)
 - Administrator** (95%)
 - uniqueusername: Administrator
 - 0 Bytes 9/30/05 1:53:53 PM [HTML Version](#)

Figure05: 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:

Override 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.

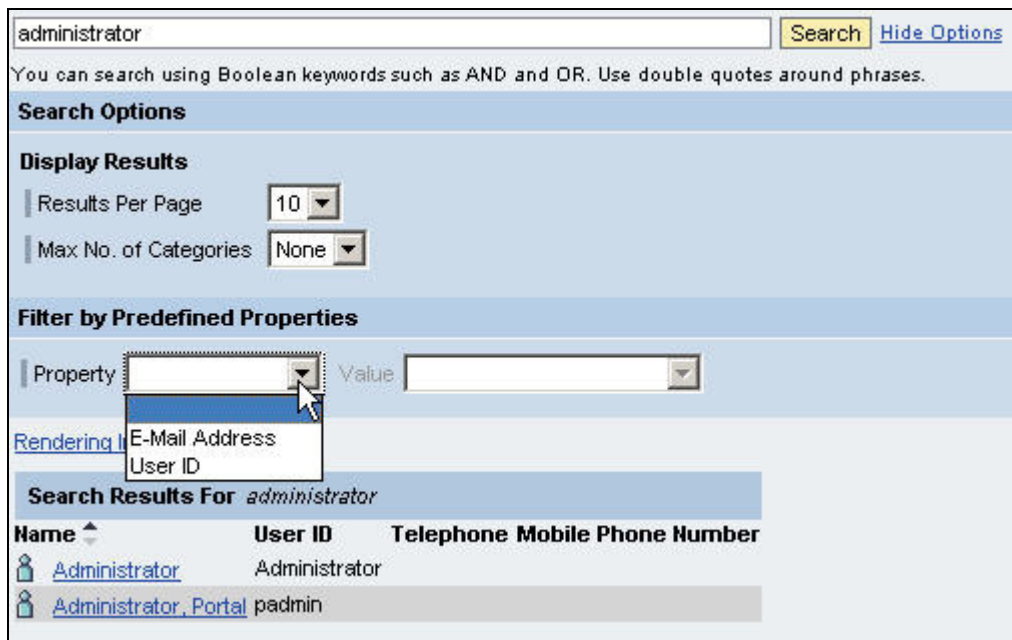


Figure06: Rendering Information with defined Layout Set

As you can verify in Figure06, 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. (Figure06)

- **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.

The screenshot displays a 'User Details' dialog box with the following information:

- User Status:** User is online (indicated by a green icon).
- Collaboration Integration:** Context menu options: Send E-mail..., Create Appointment..., Show Availability, Send Instant Message...
- General Information:** Profile picture of a man with glasses.
- General Data:**
 - Name: Last Name: folder, First Name: user, User ID: folderuser
 - Communication: Telephone: +49 7777 888 888, Mobile Phone Number: +49 177 66 68 488, Fax: +49 7777 888 999, E-Mail Address: asfd@sef.dwe
- Address and Company:**
 - Department: Folder Factory
 - Job Title: Folder Consultant
 - Vacation: 07/03/2005 - 27/03/2005
 - ExpertArea: EP-U ME

Figure07: 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.

SearchRequest for an EP-Expert

Search [Show Options](#)

Filter by Predefined Properties

Property: ExpertArea Value: EP*

Property: Value

Search Results Items: All

Name	User ID	Telephone	Mobile Phone Number	ExpertArea	Vacation
folder.user	folderuser	+49 7777 888 888	+49 177 66 68 488	EP-UWE	07/03/2005 - 27/03/2005
Schlecht, Alexander	schlecht			EP-KM	06/04/05 - 22/05/05

Link to User-Details

Collaboration Integration

Own created properties

Figure08: 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*.

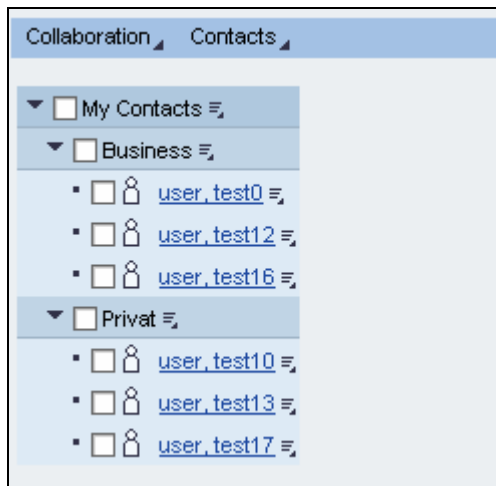


Figure09: Collaboration-Launch-Pad

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

UserProfile based on par *com.sap.portal.usermanagement.admin* with component *UserProfile* (Figure10)

The screenshot shows a web form titled 'User Profile' with a sub-header 'Modify My Profile'. Below the title is a brief instruction: 'This form allows you to modify your profile. You can use the expand/minimize icon on the fa'. The form is divided into two main sections: 'General Information' and 'Contact Information'. The 'General Information' section includes fields for 'User ID' (readuser), 'Last Name' (read), 'First Name' (user), 'E-Mail Address' (read.user@company.com), 'Form of Address', 'Account Status' (Active), and a checkbox for 'Activate Accessibility Features'. The 'Contact Information' section includes fields for 'Telephone', 'Fax', 'Mobile', 'Street', 'City', 'State/Province', 'Zip/Postal Code', 'Country' (a dropdown menu), and 'Time Zone' (a dropdown menu).

User Profile	
Modify My Profile	
This form allows you to modify your profile. You can use the expand/minimize icon on the fa	
General Information	
User ID:	readuser
Last Name:*	<input type="text" value="read"/>
First Name:*	<input type="text" value="user"/>
E-Mail Address:*	<input type="text" value="read.user@company.com"/>
Form of Address:	<input type="text"/>
Account Status:	Active
Activate Accessibility Features: (Screen reader required)	<input type="checkbox"/>
Contact Information	
Telephone:	<input type="text" value="+49 12 345 6789"/>
Fax:	<input type="text" value="+49 12 345 6780"/>
Mobile:	<input type="text" value="+49 178 345 6780"/>
Street:	<input type="text"/>
City:	<input type="text"/>
State/Province:	<input type="text"/>
Zip/Postal Code:	<input type="text"/>
Country:	<input type="text" value="-Select-"/>
Time Zone:	<input type="text" value="-Select-"/>

Figure10: UserProfile

- PhotoUpload based on par `com.sap.netweaver.kmc.people` with component `ChangePhoto`.

Hint:s:

In the iView properties there is an attribute 'Administrative Mode' with the values 'YES' and 'NO'. For the 'normal' portal user please choose 'no'. (Figure11)

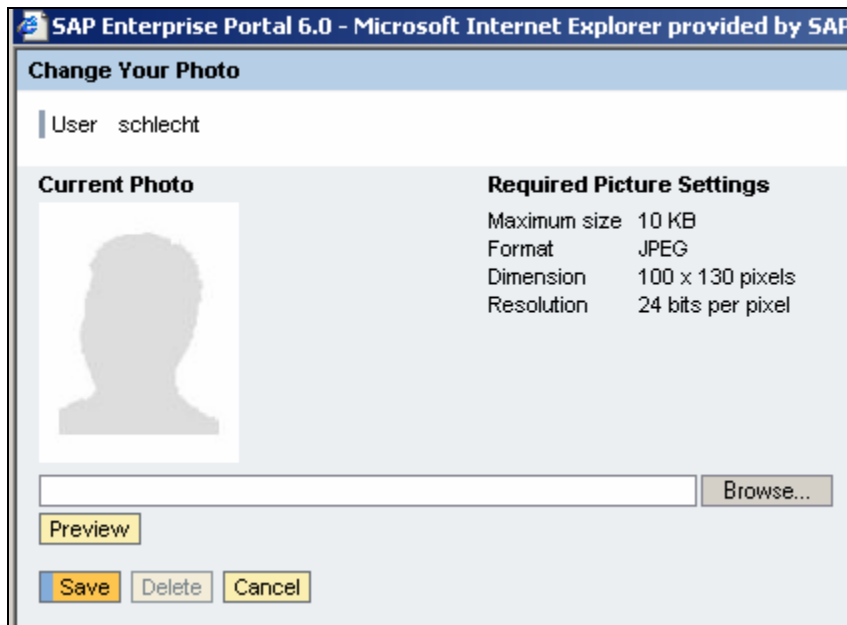


Figure11: User Photo Maintenance (Self Service)

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. (Figure12)

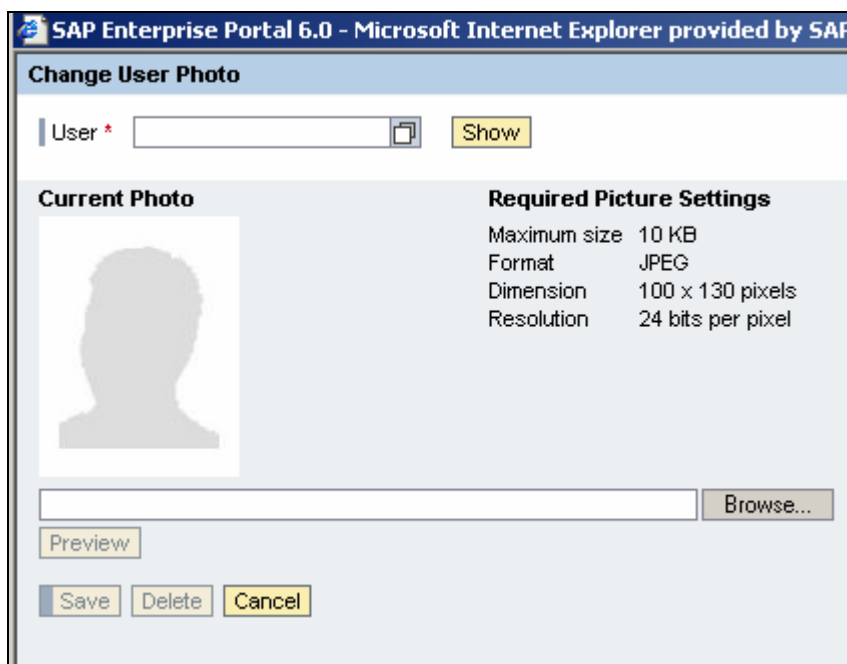


Figure12: User Photo Maintenance (Administration)

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