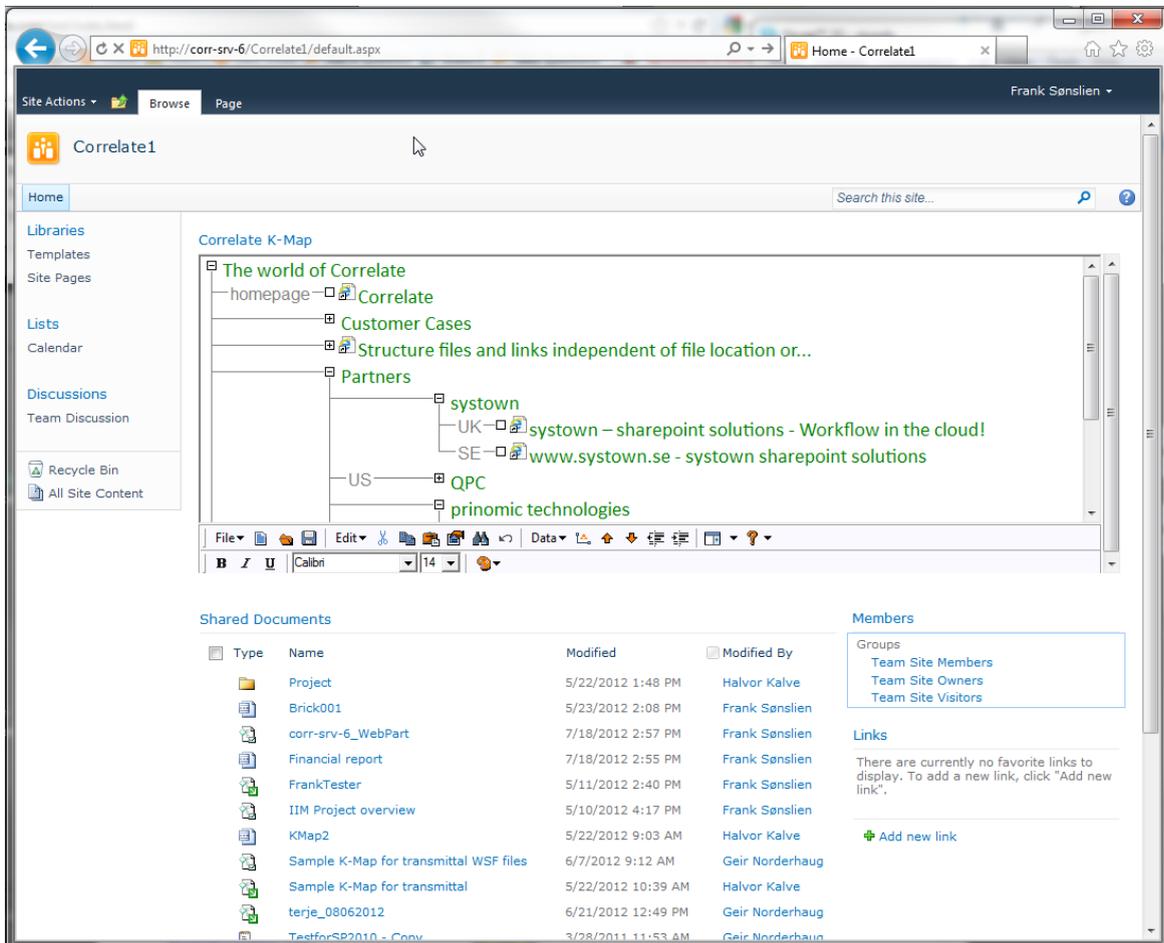


Correlate

Web Part Admin Guide for Microsoft SharePoint 2010





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Introduction

Correlate for Microsoft Office SharePoint Portal Server 2010 and WSS 3.0 includes three parts:

- Correlate Web Service
- Correlate Web Part
- Correlate Client

Correlate Web Part

The Correlate Web Part enables the administrator (or a user with sufficient rights) to add Correlate to any web part page on the server. This is a standard Windows SharePoint Services web part, created using ASP.NET.

Correlate Client

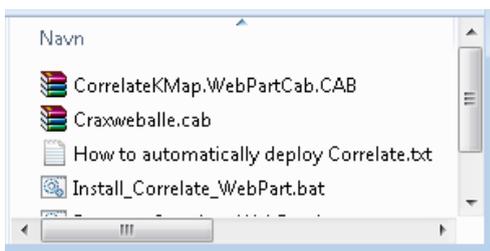
This is the software package running on the client side, giving the user the “rich client” user-experience. It includes all the standard Correlate components, as well as the customized add-ins required to use Correlate together with the MS SharePoint Foundation 2010.

The Correlate client can access documents, folders and metadata on MS SharePoint Foundation 2010.

Installing the Correlate Web Part

The files to be installed are:

- CorrelateKMap.WebPartCab.CAB
- Craxweballe.cab



Deploying the Web Part

The easy way to do the installation is just run the bat file:

Install_Correlate_WebPart.bat

which you will find in the installation package you all ready has opened.

After the installation is complete, you may have to reset the IIS server. Do that using the command **iisreset** from the command prompt.

*If you followed the suggestions above, you can skip to the section, **Adding the Correlate Client CAB file to the server***

The rest of can continue the installation here: The Correlate web part is deployed using the standard Microsoft Office SharePoint Server 2010 mechanism for deployment of web parts, using the **stsadm** tool. With the current installation of Microsoft Office SharePoint Server 2010, this tool can be found at **C:\Program Files\Common Files\Microsoft Shared\web server extensions\14\BIN\stsadm**

The command parameters used for deployment are:

-o addwppack -force -globalinstall -filename X:\correlatewebpartcab.cab

This instructs the tool to add the Correlate web part package to the server.

Use parameter **-force** to ensure replacement of any current installation of the Correlate web part that may exist on the server.

Use parameter **-globalinstall** to install the package to the GAC (Global Assembly Cache). This ensures that the web part can run under the right permissions (the Correlate web part is a "strongly named assembly", so it can run from the Global Assembly Cache), and will be available for all the virtual servers you may have.

For instance, the command used for the deployment of the Correlate web part when you start in command prompt in the directory of the web part cab may be:

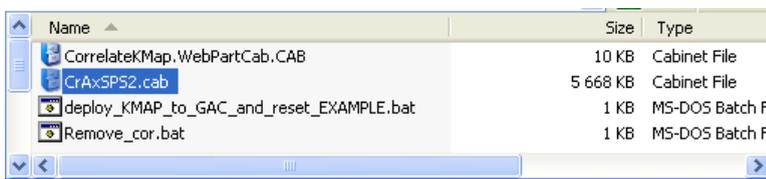
"C:\Program Files\Common Files\Microsoft Shared\web server extensions\14\BIN\stsadm" -o addwppack -force -globalinstall -filename CorrelateKMap.WebPartCab.CAB

Note: If you install the web part, and then add another virtual server, you will need to deploy the web part again, so that it becomes available to users of this virtual server.

After the installation is complete, you may have to reset the IIS server. Do that using the command **iisreset** from the command prompt.

Adding the Correlate Client CAB file to the server

To be able to enjoy the automatic installation of the Correlate Client software, you will need to add the Correlate Client CAB file to the Sharepoint server. The cab file for Sharepoint is usually named Craxweballe.cab and can be found in the Web Part directory. Copy this file to the virtual server path and make a note of the filename for use when configuring the Web Part.



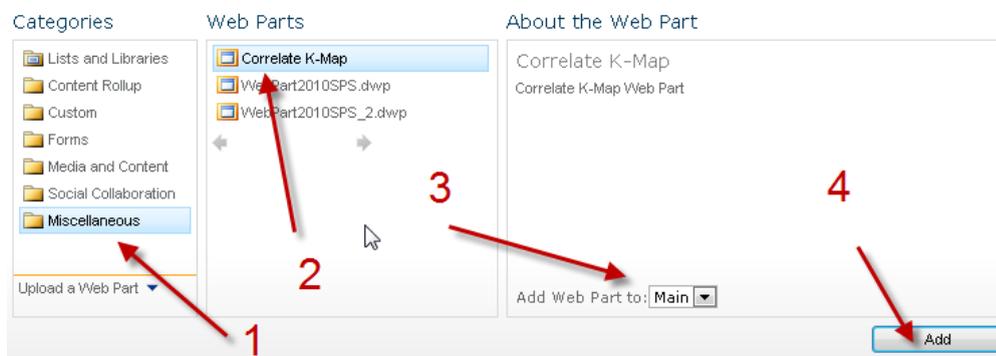
With MS SharePoint Foundation 2010, this virtual path is mapped to the following physical folder on disk.

C:\Program Files\Common Files\Microsoft Shared\web server extensions\14\ISAPI\.

Adding the Correlate Web Part to a Web Part Page

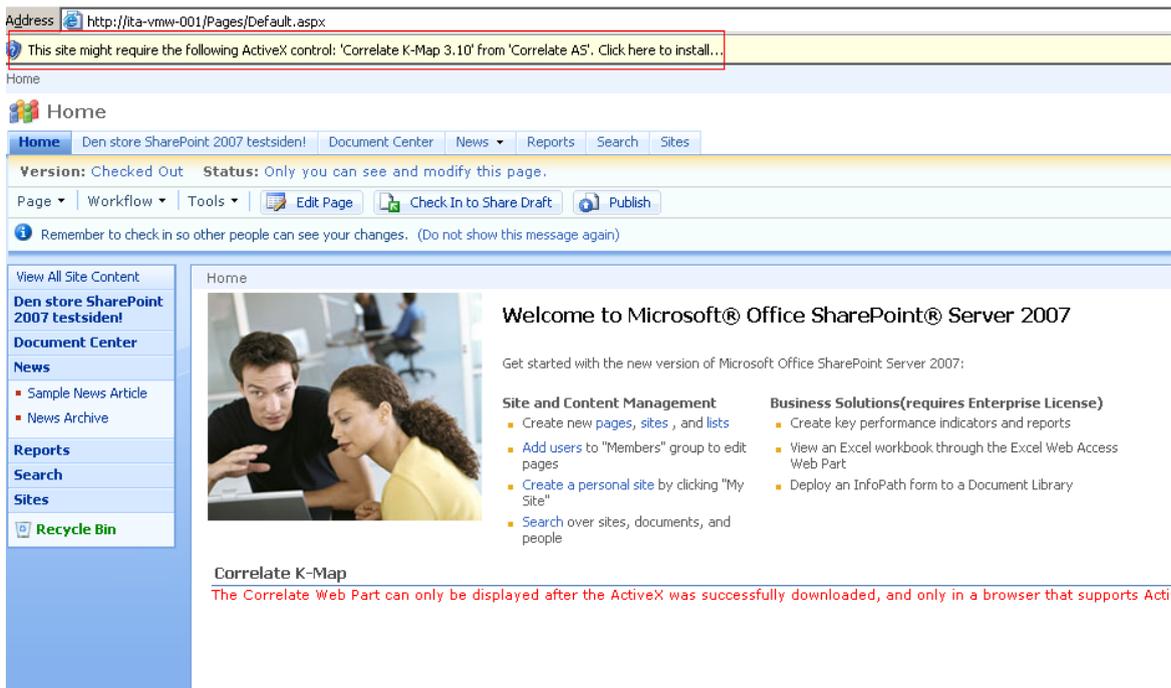
Once the Correlate web part is deployed, you can add it to any page on your server. Take the following steps:

1. Go to the designated web part page, and click the **Site Actions** link.
2. From the **Site Actions** menu, choose the **Edit Page** option
3. Click the **Add a Web Part** link in the zone you wish to add the K-Map web part.
1 Select Miscellaneous, 2 Select Correlate K-Map 3 Select the part of the page where you wants to install the web part., 4 add

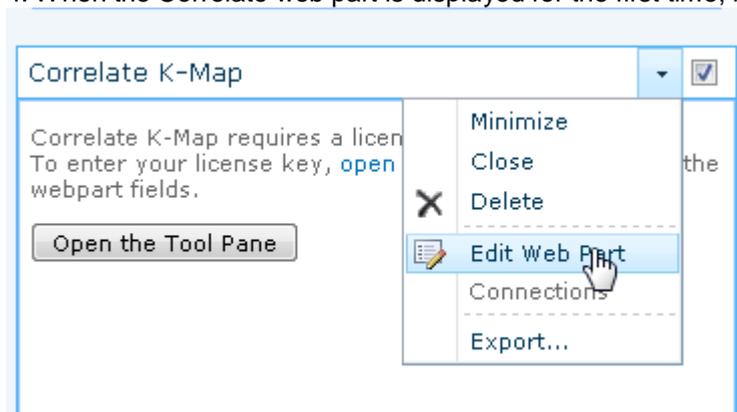


You can now close the **Add Web Parts** pane.

If you have not installed the Correlate client software, and your site is not registered as safe in your browser, you will get a red text informing you that the ActiveX need to be downloaded and installed. Click the yellow bar in internet explorer that will enable you to install the ActiveX control (shown with a red outline in the picture below).



4. When the Correlate web part is displayed for the first time, it looks like this:



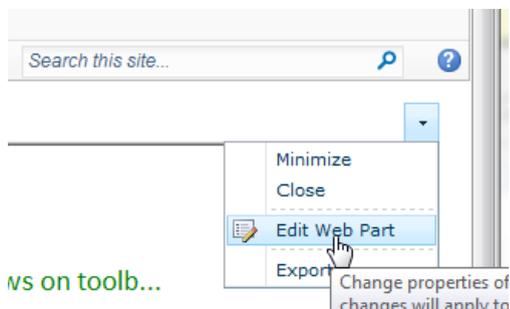
Please click on the little black arrow in the upper right corner and select Edit Web Part. Now you can enter the license key, and configure how you want the Web Part to work.

Setting up the web part

The Correlate web part has several settings to control the overall functionality. You can leave several of the fields blank. Correlate then uses the cached values from previous settings or from the installation. All urls used by Correlate web part must be absolute.

Edit web part

When updating license key or deploying a Correlate client side upgrade using a new CAB version, you will need to access the tool pane.



To open the Web Part tool pane, click the Edit drop box (in the upper right corner of the Correlate web part) and choose: "**Edit Web Part**".

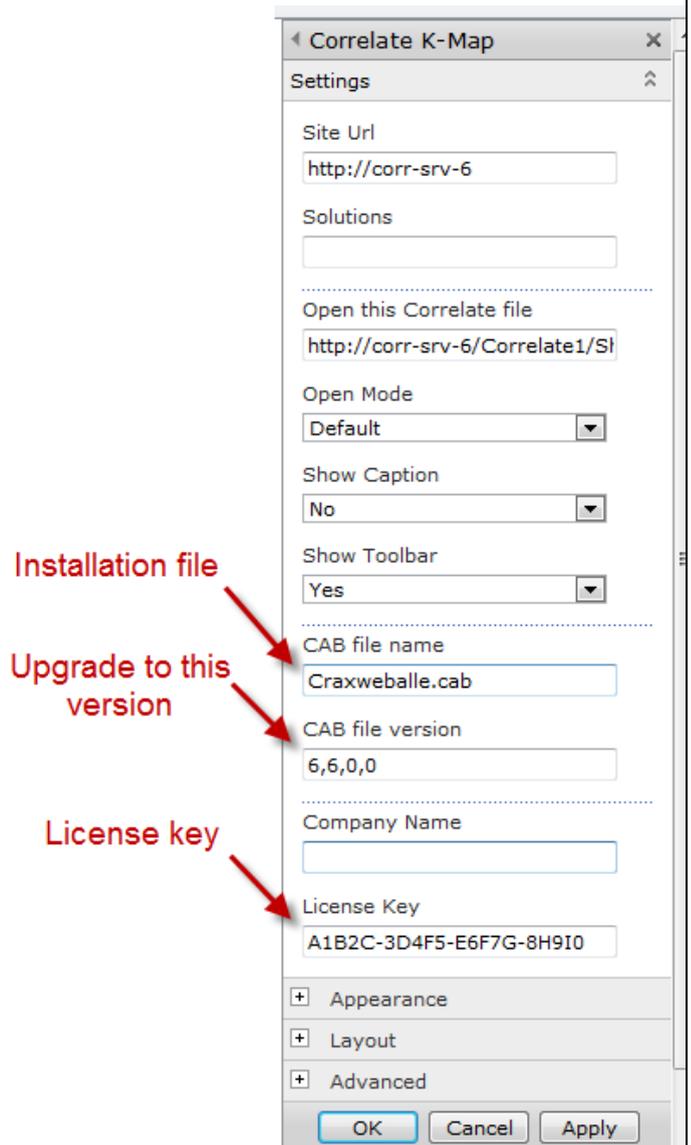
Edit web part

The menu on the right will appear. Here you can choose which K-Map the web part shall open. You can select what and how Correlate shall display the K-Map. Noraml, read-only or viewer. Tollbar can be hidden. Sizes and other parameters for the K-Map can also be chosen.

CAB File name: Installation file must be copied to **C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\14\SAPI**.

CAB File version: The version must reflect the version which should be installed.

License key: Enter your license key here.



Example settings for Correlate web part

Detailed web part settings

- The **Site Url** is an editable field that holds the root of navigation for Correlate. Setting this field blank is the same as keeping the cached setting in the client. All urls should be absolute.
 - Example: http://correlate.demo.com/mysite_collection Mind that the url is without slash at the end and no .aspx file at the end.
- The **Solutions** field is used to instruct the client to fetch pre-defined solutions from the server. Setting this field blank is the same as keeping the cached setting in the client or no server side solutions at all.
 - Example <http://correlate.demo.com/sites/mysite/kmapSolutions>).
- Use the **Open this K-Map** field to instruct the client to open a specific Correlate K-map when loaded. Use the **Open Mode** selection box to define the mode this initial Correlate K-Map file is opened. Use absolute url to the K-Map to open.
 - Example: http://correlate.demo.com/mysite_collection/documents/mykmap.kma
- Use the **Show Caption** to turn on and off the caption in the Correlate web part.
- Use the **Show Toolbar** to turn on and off the Correlate toolbar.
- Use the **CAB file name** and **CAB file version** fields when upgrading the clients to the next version. The name of the cab file is the same as the one you copied to the virtual server earlier. It is usually Craxweballe.cab for users using Outlook and CrAxSPS2Notes.cab for users using Lotus Notes. If left blank, the application will not check versions and update old version, but use the version installed on the client computer.
- **Company Name** is the name given together with the license key. If you leave this field blank, Correlate will use the cached value from previous installation. If you have a mismatch between this value and the license key, you will get an unauthorized message on the about correlate dialog.
- **License Key** determines the version of Correlate installed (Full or Viewer). If left blank in the web part, Correlate first tries to use a cached version, if no one is provided, the application asks the user to add a license key before starting to use the application.

When done, click the **OK** button to close the **Correlate** tool pane.

Setting up server based solutions

First you have to create a new document library to hold the solution on the server. All users needs at least read access to this document library. You can create or copy .kms (K-Map solutions) files to the root of the library or create your own folders to hold the solutions. All .kms files at the root will be added at a tab with the same name as the library, and each of the folders get its own tab. Only K-Map solution files (.kms) will show in the new K-Map dialog.

Licensing

- A common pattern of using Correlate is to have a predefined site to deal with license keys and installation and leave all other web parts with no information of version and keys.
- This makes you able to deploy **full version** to the ones needing to edit K-Maps and **viewers to other users**.
- When doing this, you usually also leave the CAB file name and CAB file version fields blank as well in all but the installation site web part.
- To be able to deploy different keys for different users, simply hide the full key web part for viewer users and the viewer web part for the full users in the deployment site.

Installing the Correlate Client

The Correlate client software package uses Microsoft's CAB mechanism for the installation. When a user for the first time accesses a page where Correlate has been integrated, the CAB mechanism will **automatically** download and install the required software components. At this time it is necessary to uninstall previous versions before the client can be updated. Recent files list and other things will be kept during this operation.

This will also occur when upgrading the client software. If the **CAB file version** specified on the **Correlate** tool pane (see previous section) is newer than the version currently installed on the client, the newest version will be automatically downloaded and installed.

Please observe that on the present releases it is necessary to uninstall before installing the new version.

If for some reason the automatic cab installation routines can not be used, alternative installation methods are available. The Correlate standalone installer is available as an EXE file for individual installation. Individual files and documentation for repackaging of client software are also available. For download of these files and instructions, please contact Correlate support at support@correlate.com.

To avoid the blocking of the Correlate ActiveX control you should put the server in your trusted zone list by doing the following:

- In I.E., browse to the SharePoint page on which the Correlate web part is set up
- Note the ActiveX installation prompt, click it and choose "Install ActiveX Control..."
- Go to Tools -> Internet options -> Security and select the Trusted sites icon
- Click Sites and Add your site to the list using the Add button

Installing the Correlate Icons on the SharePoint server

To acquire the correct Correlate icons in the native SharePoint web interface, two icon files need to be added to the server as well as editing of a settings file with references to the new icon files.

1. Copy `correlatekma.gif` and `correlatekms.gif` to `C:\Program Files\Common Files\Microsoft Shared\web server extensions\14\TEMPLATE\IMAGES`
2. Add the following to `DOCICON.xml` in `C:\Program Files\Common Files\Microsoft Shared\web server extensions\14\TEMPLATE\XML` to the section showed below.

```
<DocIcons>
...
<ByExtension>
  <Mapping Key="asax" Value="icasax.gif"/>
  <Mapping Key="ascx" Value="icascx.gif"/>
  ...
  <Mapping Key="kma" Value="correlatekma.gif"/>
  <Mapping Key="kmp" Value="correlatekma.gif"/>
  <Mapping Key="kms" Value="correlatekms.gif"/>
  ...
  <Mapping Key="xslt" Value="icxslt.gif"/>
  <Mapping Key="zip" Value="iczip.gif"/>
</ByExtension>
...
</DocIcons>
```

Upgrades

Below is described how to upgrade Correlate for SharePoint.

1. Check if the version of the web part that comes with the new version has changed. It is not necessary to do the upgrade of the web part to update the Correlate Client. If you need to update the web part you must first remove the old one.

This is done by run the following command:

```
"C:\Program Files\Common Files\Microsoft Shared\web server
extensions\14\BIN\stsadm" -o deletewppack -name correlateKmap.Webpartcab.cab
```

Or

you may run „**Remove_cor.bat**“

Now you can deploy the Web part as described in section „Deploying the Web Part“ above. Remember that you have to reconfigures all the web parts when you have a version change. See section „Adding the Correlate Web Part to a Web Part Page“ above.

2. To update the Correlate Client cab, just copy the new Client CAB file into the virtual server directory (described in “Adding the Correlate Client cab to the server”) and change the version to check for in the web part configuration (described in “Setting up the web part”).