

# Novell Teaming + Conferencing

1.1

June, 2007

INSTALLATION AND  
CONFIGURATION GUIDE

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ICEcore

ICEcore

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# About This Guide

This guide covers the installation and initial configuration of ICEcore.

## Audience

This guide is intended for ICEcore administrators.

## Contents of this Manual

This manual provides information about the following:

- ♦ Installing ICEcore
- ♦ Configuring ICEcore
- ♦ Controlling Access

## Conventions

This manual uses the following conventions:

A greater-than symbol (>) is used to separate actions within a step and items in a cross-reference path.

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When a single pathname can be written with a backslash for some platforms or a forward slash for other platforms, the pathname is presented with a backslash. Users of platforms that require a forward slash, such as Linux or UNIX, should use forward slashes as required by your software.

What you see	What it means
Click the <i>Add toolbar</i> item.	References to toolbar items, links, menu items, and buttons are presented in <i>italic</i> font.
Click the <i>Getting Started</i> link.	
Click the <i>Add Document</i> menu item.	
Click <i>Close</i> .	
Type <i>status</i> , then press Enter.	Text that you must type and file names are presented in <i>Courier</i> font.
Open the <i>ManagerGuide.pdf</i> file.	

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## Documentation Updates

For the most recent version of the ICEcore Installation and Configuration Guide, visit the [Novell Web site \(http://www.novell.com/documentation/\)](http://www.novell.com/documentation/).

## Additional Documentation

You may find more information in the ICEcore documentation, which is accessible from links within ICEcore:

- ♦ ICEcore Help system
- ♦ ICEcore Quick Start Guide
- ♦ ICEcore User Guide
- ♦ ICEcore Installation and Configuration Guide

The ICEcore online documents may be found from within the ICEcore Help system. To access the ICEcore Help system, after logging in (described later in this manual), click the *Help* link.

In the ICEcore Help system, click the *Getting Started Manuals* link to access copies of the online documents listed above.

# Installing ICEcore

# 1

This chapter describes how to initially install and configure ICEcore:

- ♦ [Section 1.1, “Prerequisites,” on page 7](#)
- ♦ [Section 1.2, “Steps for Installing ICEcore,” on page 8](#)
- ♦ [Section 1.3, “Database Planning,” on page 8](#)
- ♦ [Section 1.4, “File System Planning,” on page 9](#)
- ♦ [Section 1.5, “Editing the Installer \(.xml\) File,” on page 9](#)
- ♦ [Section 1.6, “Run the Installer: Sample Installer Sequence,” on page 15](#)
- ♦ [Section 1.7, “Starting and Stopping ICEcore,” on page 18](#)
- ♦ [Section 1.8, “Initial Logon,” on page 19](#)
- ♦ [Section 1.9, “Adding Users,” on page 19](#)
- ♦ [Section 1.10, “Mail Setup,” on page 21](#)
- ♦ [Section 1.11, “Memory Guidelines,” on page 23](#)
- ♦ [Section 1.12, “Document Support,” on page 24](#)

## 1.1 Prerequisites

You need a few things before you install ICEcore:

1. Computer:
  - ♦ Minimum 2Ghz processor
  - ♦ Multi-CPU systems preferred
  - ♦ Minimum 2GB RAM
2. JDK 1.5.x installed (do not use 1.6).
3. A Database Server:
  - ♦ MySQL 5.0.37 for Linux or MySQL 5.0.36 Windows
  - ♦ SQL Server for Windows (2000 or 2005)

---

**NOTE:** You may potentially run with less RAM for specific development and testing configurations without simultaneous users, lots of database traffic, etc.

---

See [“Memory Guidelines” on page 23](#) for details.

See [“Database Planning” on page 8](#) for details.

### How much disk do you need?

This depends on how much data you plan to put into the system.

The software takes about 250 MB.

## 1.2 Steps for Installing ICEcore

The following sequence shows the steps you want to follow to install ICEcore:

- 1 Install JDK and Set Path
- 2 Install and Configure the Database Server
- 3 Download the appropriate ICEcore kit
- 4 Edit the installer.xml file (see [Editing the Installer \(.xml\) File](#))
- 5 Run the installer (on Linux, do a `chmod +x installer.linux` to make the installer executable)
- 6 Start and Stop ICEcore
- 7 Login
- 8 Add Users

## 1.3 Database Planning

ICEcore and LifeRay use separate dedicated databases within your database server.

A set of SQL configuration scripts are used to initialize the databases (creating the necessary tables, etc.).

ICEcore's default database is MySQL. It also supports SQL Server on Windows

ICEcore's database requirements are relatively modest. The bulk of the data uploaded to ICEcore is stored in a file repository (see [File System Planning](#) - the database is primarily used for storing metadata and descriptive text.

Because the amount of data stored in the database is highly sensitive to the usage patterns of ICEcore (which are highly variable) there is no reliable formula for determining disk space usage, but the following can be used as a guideline:

- ♦  $\text{numberAttachments} \times \text{averageAttachmentSize} = \text{totalAttachmentSpace}$
- ♦  $\text{totalAttachmentSpace} \times .04 = \text{sqlDataSpace}$
- ♦  $\text{sqlDataSpace} \times 5 = \text{sqlStorageSpace}$

### MySQL

- ♦ MySQL 5 is required
- ♦ Specify `root` for the administrator password (or make commensurate changes in the ICEcore `installer.xml` file)
- ♦ Set the default character set to UTF-8 by selecting “*Best support for Multilingualism*”

### Microsoft SQL Server

- ♦ You can use SQL Server 2000 or SQL Server 2005
- ♦ Make sure to select SQL Server and Windows for authentication (the default is Windows only)
- ♦ Set the administrator password to “`sa`” (or make commensurate changes in the ICEcore `installer.xml` file)



## 1.4 File System Planning

ICEcore software and configuration files are stored in a tree shared with LifeRay, Tomcat, etc. There are some temporary files also located here, but mainly locks, etc.

ICEcore data is stored in the database (see “[Database Planning](#)” on page 8) and on the file system. The file system usage is divided up into several functional areas:

- ♦ `filerepository` - This is where all attachment files are located, so it tends to be a large consumer of disk space. The tree is roughly organized by zone, binder (folder/workspace), and entry.
- ♦ `archiveStore` - Only activated in the Enterprise version of ICEcore, this is where previous versions of files are stored. The files are stored here to meet compliance and archival goals.
- ♦ `cachefilestore` - This tree holds information derived from the attachments, such as thumbnails, scaled images, text, and HTML renderings. Depending on the nature of the attachments this tree consumes somewhat less space than the file repository (but it can, conceivably, store more).
- ♦ `lucene` - This tree holds the search index for the data. It tends to be a fraction of the space consumed by the file repository, but it is also sensitive to the type of information stored.
- ♦ Other trees - These are other trees that you cannot configure which typically consume a small amount of space (relatively speaking).
  - ♦ `rss` - Caches of RSS feeds for folders
  - ♦ `temp` - Temporary files
  - ♦ `definitions` - Custom definitions are stored here

## 1.5 Editing the Installer (.xml) File

The `installer.xml` file provides the ICEcore installer with detailed configuration information regarding network, memory, database, file system, e-mail, presence, and other settings. Edit this file with your specific data.

**For a quick installation edit the following sections:**

- 1 Change the Host name in the Network section. Change the port number to 80 and the `securePort` to 443 if this is a dedicated server.
- 2 Consider changing the `JavaVirtualMachine` setting in the Memory section if you have a large installation.
- 3 Use the default file system configuration. This stores the files in `/home/icecoredata`
- 4 The default database configuration is MySQL, with the default MySQL passwords.
- 5 Use the default Lucene configuration.
- 6 Modify the Email section with your SMTP and POP/IMAP servers.
- 7 This initial beta release does not come with the Novell Conferencing software, so use the default Presence configuration.

**An example installer.xml file is shown below:**

```
<!--                                     -->
<!--             ICEcore Installation Configuration File             -->
<!--                                     -->

<ICEcoreConfig>

    <!--                                     -->
    <!--             Network Settings                                     -->
    <!--                                     -->
    <!-- The host name or IP address of the server must be             -->
    <!-- specified here. The default, localhost, is only             -->
    <!-- appropriate for test configurations with no remote         -->
    <!-- access.                                                     -->
    <!--                                     -->
    <!-- If you have a dedicated server, setting the port           -->
    <!-- to "80" and/or securePort to "443" will avoid having       -->
    <!-- to specify a port number in browser URLs.                 -->
    <!--                                     -->

    <Network>
        <Host name="localhost" port="8080" securePort="8443" />
        <WebServices endpoint="http://localhost:8080" />
    </Network>

    <!--                                     -->
    <!--             Memory (RAM) Settings                               -->
    <!--                                     -->
    <!-- ICEcore requires a minimum of 512m to operate.             -->
    <!-- 1g is recommended for basic production.                   -->
    <!-- More is better.                                             -->
    <!--                                     -->

    <Memory>
        <JavaVirtualMachine mx="1g" />
    </Memory>

    <!--                                     -->
    <!--             File System Configuration                           -->
    <!--                                     -->
    <!-- Modify the configName to your desired configuration         -->
    <!-- in the FileSystem element below. You must set the           -->
    <!-- configName to the exact configuration in the file:         -->
    <!--     basic          - Simple one-directory setup             -->
    <!--     advanced       - Advanced multiple-directory setup      -->
    <!--                                     -->
    <!-- NOTE: Only basic is supported for alpha test.              -->
    <!--                                     -->

    <FileSystem configName="basic">

        <!-- The basic configuration only requires that you -->
        <!-- specify a root directory for the data and       -->
        <!-- we'll take care of the rest.                    -->

        <Config id="basic">
            <RootDirectory path="/home/icecoredata" />
        </Config>
    </FileSystem>
</ICEcoreConfig>
```

```

<!-- The advanced configuration requires that you -->
<!-- specify individual directory locations. -->

<Config id="advanced">
  <RootDirectory path="/home/icecoredata" />
  <FileRepositories />
  <ArchiveStore />
  <CacheStore />
  <LuceneIndex />
  <Other />
</Config>

</FileSystem>

<!-- -->
<!-- Database Configuration -->
<!-- -->
<!-- Modify the configName to your desired configuration -->
<!-- in the Datatabase element below. You must set the -->
<!-- configName to the exact configuration in the file: -->
<!-- MySQL_Default - For MySQL -->
<!-- SQLServer_Default - For Microsoft SQL Server -->
<!-- -->
<!-- Change the Resources for the configuration you chose -->
<!-- (the defaults are pretty good for a simple configuration -->
<!-- with the database running locally, but you'll probably -->
<!-- have different passwords!). -->

<Database configName="MySQL_Default">

  <!-- -->
  <!-- MySQL_Default -->
  <!-- -->

  <Config id="MySQL_Default" type="MySql">
    <Resource for="liferay"
      driverClassName="com.mysql.jdbc.Driver"
      url="jdbc:mysql://localhost:3306/
lportal?useUnicode=true&characterEncoding=UTF-8"
      username="root"
      password="root"
    />
    <Resource for="icecore"
      driverClassName="com.mysql.jdbc.Driver"
      url="jdbc:mysql://localhost:3306/
sitescape?useUnicode=true&characterEncoding=UTF-8"
      username="root"
      password="root"
    />
  </Config>

```

```

<!--                                     -->
<!--             SQLServer_Default      -->
<!--                                     -->

<Config id="SQLServer_Default" type="SQLServer">
  <Resource for="liferay"
    driverClassName="net.sourceforge.jtds.jdbc.Driver"
    url="jdbc:jtds:sqlserver://localhost/
lportal;SelectMethod=cursor"
    username="sa"
    password="sa"
  />
  <Resource for="icecore"
    driverClassName="net.sourceforge.jtds.jdbc.Driver"
    url="jdbc:jtds:sqlserver://localhost/
sitescape;SelectMethod=cursor"
    username="sa"
    password="sa"
  />
</Config>

</Database>

<!--                                     -->
<!--             Lucene Configuration Settings      -->
<!--                                     -->
<!--                                     -->
<!--                                     -->
<!--       The Lucene index can be run "local" (within
<!--       the context of this application) or "server"
<!--       (run as it's own server).  Additionally it
<!--       can be run as it's own server on this system
<!--       or on a remote system.
<!--                                     -->
<!--                                     -->

<Lucene luceneLocation="local">
  <Resource
    lucene.index.hostname="localhost"
    lucene.flush.threshold="100"
    lucene.max.booleans="10000"
    lucene.max.merge.docs="1000"
    lucene.merge.factor="10"
  />
</Lucene>

<!--                                     -->
<!--             Email Configuration Settings      -->
<!--                                     -->
<!--       Edit the Outbound and Inbound settings as required.
<!--                                     -->
<!--                                     -->
<!--       For inbound mail (postings) you need to specify either
<!--       pop3 or imap, and fill out the settings for which one
<!--       you choose.  These settings are not used until you
<!--       enable incoming email within the product.  If you do
<!--       not plan on using inbound email, you can ignore these
<!--       settings.
<!--                                     -->
<!--                                     -->

```

```

<EmailSettings>

  <Outbound>
    <Resource
      mail.smtp.host="mailhost.yourcompany.com"
      mail.smtp.user="icecore@yourcompany.com."
      mail.smtp.password=""
      mail.smtp.auth="false"
      mail.smtp.port="25"
    />
  </Outbound>

  <Inbound>
    <Resource
      mail.store.protocol="pop3"

      mail.pop3.host="localhost"
      mail.pop3.auth="true"
      mail.pop3.user="popEmailUserId"
      mail.pop3.password="passwordHere"
      mail.pop3.port="110"

      mail.imap.host="localhost"
      mail.imap.auth="true"
      mail.imap.user="imapEmailUserId"
      mail.imap.password="passwordHere"
      mail.imap.port="143"

      mail.smtp.user="icecore@sitescape.com"
      mail.transport.protocol="smtp"
      mail.smtp.host="localhost"
      mail.smtp.port="25"
    />
  </Inbound>
</EmailSettings>

<!--                                     -->
<!--           Presence Configuration Settings           -->
<!--                                     -->

<Presence>
  <Resource
    presence.service.enable="false"
    presence.service.jabber.server="zon-server.yourcompany.com"
    presence.broker.admin.id="admin"
    presence.broker.admin.passwd="admin"
    presence.broker.jabber.domain="newzon"
    presence.broker.default.community.id="yourcommunity"
    presence.broker.zon.url="http://zon-server.yourcompany.com:8000/
imidio_api/"
  />
</Presence>

```

```

<!--                                                    -->
<!--          Mirrored Folders Configuration Settings      -->
<!--                                                    -->

<MirroredFolders>

    <MirroredFolder enabled="false" type="file"
                    id="fs1" title="Shared Files 1"
                    rootPath="k:/somedir">
        <AllowedUsers idList="administrator,u1,u2,u3" />
        <AllowedGroups idList="g1,g2,g3" />
    </MirroredFolder>

    <MirroredFolder enabled="false" type="file"
                    id="fs2" title="Shared Files 2"
                    rootPath="/sharedFiles/someDirectory">
        <AllowedUsers idList="administrator,u1,u2,u3" />
        <AllowedGroups idList="g1,g2,g3" />
    </MirroredFolder>

    <MirroredFolder enabled="false" type="sharepoint"
                    id="sp1" title="Sharepoint 1"
                    rootPath="/Shared Documents/cool-dir">
        <WebDAVContext hostUrl="http://hostname" user="accessId"
password="pass" />
        <AllowedUsers idList="administrator,u1,u2,u3" />
        <AllowedGroups idList="g1,g2,g3" />
    </MirroredFolder>

</MirroredFolders>

<!--                                                    -->
<!--          Custom Configuration Settings                -->
<!--                                                    -->
<!-- Custom properties set here will be placed in the     -->
<!-- ssf-ext.properties file.                             -->
<!--                                                    -->

<CustomProperties>
    <Resource
    />
</CustomProperties>
</ICEcoreConfig>

```

## 1.6 Run the Installer: Sample Installer Sequence

```
LED-SLES10:~ # ./installer.linux

Novell Teaming and Conferencing Enterprise Installer 0.1.2

Checking license key...

License Summary

  Product:   Novell Teaming and Conferencing Enterprise
  Version:   1.0
  UID:       1
  Effective: 2007-04-01
  Expires:   2007-04-01
  Users:     1000

Installing this software requires agreement to the
terms and conditions set forth in the:
  Novell EULA and Export Compliance Notice

You can review this agreement again at the download site or
type "REVIEW" below.

Note: You must answer "YES" to install the software.

Have you read and agree with the license? : yes

Starting installation...

JAVA_HOME is set to: /usr/java/jdk1.5.0_11
  Loading installer.xml...
Creating installer working directory: /root/temp-installer

Enter the type of installation:

  1. Novell Teaming and Conferencing Enterprise with Liferay/Tomcat - FULL
INSTALL
  2. Novell Teaming and Conferencing Enterprise with Liferay/Tomcat - UPDATE
  3. Novell Teaming and Conferencing Enterprise Lucene Server      (Not
Available)
  4. Apply settings only      (Use with care)

Installation type [1]:

We have to install the software into a dedicated directory
Install directory: [/usr/local/icecore-team-0.1.0]:
  Directory /usr/local/icecore-team-0.1.0 does not exist.  Creating...
  Checking database settings...
  Database type is: MySQL
  Checking MySQL version and access for LifeRay
    mysql --user=root --password=root --port=3306
  -----
mysql Ver 14.12 Distrib 5.0.37, for pc-linux-gnu (i686) using readline 5.0

Connection id:          1
Current database:
Current user:           root@localhost
```

```

SSL:                                Not in use
Current pager:                      stdout
Using outfile:                      ''
Using delimiter:                    ;
Server version:                     5.0.37-community MySQL Community Edition (GPL)
Protocol version:                   10
Connection:                         Localhost via UNIX socket
Server characterset:                latin1
Db      characterset:                latin1
Client characterset:                latin1
Conn.  characterset:                latin1
UNIX socket:                        /var/lib/mysql/mysql.sock
Uptime:                             12 min 16 sec

Threads: 1  Questions: 4  Slow queries: 0  Opens: 12  Flush tables: 1  Open
tables: 6  Queries per second avg: 0.005
-----

```

```

    Checking MySql version and access for Novell Teaming and Conferencing
Enterprise
    mysql --user=root --password=root --port=3306
-----
mysql Ver 14.12 Distrib 5.0.37, for pc-linux-gnu (i686) using readline 5.0

```

```

Connection id:                      2
Current database:
Current user:                        root@localhost
SSL:                                Not in use
Current pager:                      stdout
Using outfile:                      ''
Using delimiter:                    ;
Server version:                     5.0.37-community MySQL Community Edition (GPL)
Protocol version:                   10
Connection:                         Localhost via UNIX socket
Server characterset:                latin1
Db      characterset:                latin1
Client characterset:                latin1
Conn.  characterset:                latin1
UNIX socket:                        /var/lib/mysql/mysql.sock
Uptime:                             12 min 16 sec

Threads: 1  Questions: 8  Slow queries: 0  Opens: 12  Flush tables: 1  Open
tables: 6  Queries per second avg: 0.011
-----

```

```

    NOTE: Minimum database requirement is 5.0.37
    We see Server version: 5.0.37

```

Please review above notes.

Enter Y to continue, enter N to cancel installation [Y]:

```

Copying deployment kits to work directory...
  (this takes about a minute)
  ... done

```

```

Ready to apply kits to the installation directory
Enter Y to install, enter N to cancel installation [Y]:

```



```
Installing Novell Teaming and Conferencing Enterprise (LifeRay/Tomcat)
... this will take a minute or so ...
Installing Novell Teaming and Conferencing Enterprise converters ...
... done
```

Applying installation settings...

```
Loading current configuration files...
Database settings...
  using database configuration: MySQL_Default
  Database type is: MySQL
File system settings...
  using configuration: basic
File system root path: /home/aspendata
Email settings...
Network settings...
Lucene...
Custom settings...
Startup files...
Writing all settings...
Settings applied.
```

New installation selected. Getting database creation scripts....

```
Creating Liferay database for MySQL ...
mysql --user=root --password=root --port=3306 < /root/temp-installer/liferay/
create/create-mysql.sql
Creating Novell Teaming and Conferencing Enterprise database for MySQL ...
mysql --user=root --password=root --port=3306 < /root/temp-installer/aspn/
create/create-database-mysql.sql
```

Databases created.

```
Customizing Liferay database for MySQL ...
mysql --user=root --password=root --port=3306 --database=lportal < /root/temp-
installer/changeAdministrator-lportal.sql
Customizing Novell Teaming and Conferencing Enterprise database for MySQL
...
mysql --user=root --password=root --port=3306 --database=sitescape < /root/
temp-installer/changeAdministrator-sitescape.sql
```

Databases have been customized for this product installation.

Installation completed.

You can start Novell Teaming and Conferencing Enterprise/Liferay by running the startup script  
in: /usr/local/icecore-team-0.1.0/liferay-portal-tomcat-jdk5-4.1.2/bin

## 1.7 Starting and Stopping ICEcore

### Starting ICEcore

On Windows:

```
C:\yourinstall\liferay-portal-tomcat-jdk5-4.1.2\bin\startup.bat
```

On Linux:

```
/yourinstall/liferay-portal-tomcat-jdk5-4.1.2/bin/startup.sh
```

---

**NOTE:** While this is dependent on your system configuration, it can take upwards of 60 seconds before ICEcore/Liferay starts accepting web transactions. Initial transactions also tend to be slower as various caches load into RAM. These delays are amplified somewhat when working with a new installation or updated software as the JSPs are recompiled as they are referenced.

In Windows, startup is complete when the Tomcat window displays:

```
INFO:Server Startup in ##### ms
```

---

### Setting up ICEcore to start on system startup

On Windows:

- 1 C:\yourinstall\liferay-portal-tomcat-jdk5-4.1.2\bin\service.bat  
install icecore
- 2 Use the Services Control Panel to configure the service to your needs.

On Linux, from the root account:

- 1 cd /etc/init.d
- 2 ln -s /yourinstall/liferay-portal-tomcat-jdk5-4.1.2/bin/  
icecore
- 3 chkconfig --add icecore

### Log Files/Monitoring

On Windows:

A Tomcat window appears when you issue the `startup.bat` command. Messages (good and bad) appear here.

On Linux:

Unlike Windows, the Tomcat process starts as a background process and no window appears. To monitor the messages in real time:

```
tail -f /yourinstall/liferay-portal-tomcat-jdk5-4.1.2/logs/  
catalina.out
```

### Stopping ICEcore

On Windows:

```
/yourinstall/liferay-portal-tomcat-jdk5-4.1.2/bin/shutdown.bat
```

On Linux:

```
/yourinstall/liferay-portal-tomcat-jdk5-4.1.2/bin/shutdown.sh
```

## 1.8 Initial Logon

After installing ICEcore/Liferay you need to log in. ICEcore installation creates one system administrator account and a default format for users.

1. Access your installation with a browser via the following URL:

`http://yourhost.name.here:8080`

2. At the login screen enter: administrator

3. Enter the following Password: test

This brings up the initial LifeRay portal window.

4. To add more portlets, click on the “*Add Content*” link in the upper-right-hand corner. This brings up a panel of portlets along the left-hand margin:

- ♦ Expand the “ICEcore” section to add more ICEcore features, such as the *Administration* portlet.
- ♦ Expand the “Admin” section to add useful LifeRay features such as the *Admin* and *Enterprise Admin* portlets.

The portlets are placed in the narrow column on the left side. To move a portlet to the wider right column, mouse down on the title and drag it over the right-hand column and release when you see a blue bar with arrows on each side appear.

## 1.9 Adding Users

As this is a teaming product, you probably want to add some people besides yourself.

There are two methods of managing users:

1. Basic User Management - create and manage individual accounts manually
2. LDAP/eDirectory - synchronize user account management to a corporate directory

Regardless of which method you choose it is important to realize that because ICEcore is embedded within LifeRay, a portion of user management is delegated to the LifeRay. For example, LifeRay is responsible for all user authentications.

### Basic User Management

This capability comes “out of the box” with the product - no additional setup is required.

Using the Liferay “*Enterprise Admin*” portlet, click on the *Users* tab. (Note: Liferay has two portlets, “*Enterprise Admin*” and “*Admin*.” Both have “*Users*” tabs, but they do very different things. Make sure you are using the correct portlet.) This brings up a list of current Liferay accounts. You can refer to the Liferay documentation for more advanced management, but the basic steps needed are:

1. Click *Add*.
2. Fill in the *First*, *Last Name*, assign a *User ID*, specify the e-mail address, and then click *Save*.
3. Liferay shows an extended form.
4. In the second section set the timezone and portal window size. While ICEcore can operate in an 800x600 pixel window, we recommend the 1024x768 or Full Screen option.
5. Click *Save*.
6. Click on the *Password* tab, type in the password, and then click *Save*.

The account is now ready for use, but not fully created. The administrator and other users cannot see the new user until after the user logs in for the first time. Once the new user logs in, ICEcore creates their user workspace, including a blog, calendar, and file area.

## User Management with LDAP/eDirectory

If you want to use a corporate directory as the master reference for user accounts you need to configure both Liferay and ICEcore in a similar manner. ICEcore's LDAP configuration pages are designed to look and work in a similar fashion to Liferay, easing this task significantly. You can refer to the Liferay documentation for more detailed information, but the basic steps needed are:

1. Using the Liferay “*Admin*” portlet, click on the *Users* tab.

---

**NOTE:** The Liferay “*Enterprise Admin*” and “*Admin*” portlets both have “*Users*” tabs, but they do very different things. Make sure you are using the correct portlet.

---

2. Click on the *Authentication* tab.
3. Click on the *LDAP* tab.
4. Fill out the form with the values needed to map to your corporate directory.
5. Click *Save*.
6. Using the ICEcore *Administration* portlet, click on “*Configure LDAP*.”
7. Fill out the form using the corresponding values that were used to configure Liferay. (See below for details on this form).
8. Click *Apply*.

## The ICEcore LDAP Configuration Form

This form is similar to the Liferay form but includes additional information on scheduling synchronization of all users and, optionally, groups.

Connection settings:

- ♦ URL: `ldap://host:port/dc=foo,dc=bar`
  - ♦ e.g., `ldap://192.168.3.3:389/dc=sleepy,dc=com`
- ♦ Principal: LDAP principal to authenticate access with
  - ♦ e.g., `cn=admin,o=itdepartment`
- ♦ Credentials: Above principal's password or authenticating token

Users settings:

- ♦ Ldap attribute that identifies the user
  - ♦ e.g., `uid`
- ♦ Attribute mapping - This is how you map the LDAP attribute names of the user record to the ICEcore internal identifiers. Syntax is: `aspenId=ldapAttName`
  - ♦ e.g., `lastName=sn`
  - ♦ e.g., `name=uid`
  - ♦ `AspenIds: lastName, firstName, name, description, email, Address, phone`
- ♦ Select “*Synchronize user profiles*” (recommended)
- ♦ Select “*Register LDAP user profiles automatically*” (recommended)
- ♦ Select others as appropriate

Groups settings:

- ♦ Register LDAP group profiles automatically (recommended)
- ♦ Synchronize group membership (recommended)

## Secure LDAP/eDirectory Setup

To connect to a secure LDAP server, you need to import the server's certificate into ICEcore's keystore. If the LDAP server is `ldap.company.com`, and it's running on the usual ldaps port (636), then you can follow these steps:

- 1 Make sure you have `openssl` available.
- 2 Type: `openssl s_client -connect ldap.company.com:636`
- 3 Copy everything from the '-----BEGIN CERTIFICATE-----' to the '-----END CERTIFICATE-----' lines (inclusive) into a file, say `cert.ldap` (the name does not matter).
- 4 Type:  

```
keytool -import -alias ldap.company.com -keystore /sitescape-team-0.1.0/liferay-portal-tomcat-jdk5-4.1.2/conf/.keystore -file cert.ldap
```

The path to the keystore depends on your install path.

- 5 Restart Tomcat.

---

**NOTE:** This technique only works for real certificates. If the LDAP server is using a self-signed certificate, you also need to get the certificate for the "fake" CA and add it to the `cacerts` file on the ICEcore machine. The code at [http://blogs.sun.com/andreas/entry/no\\_more\\_unable\\_to\\_find](http://blogs.sun.com/andreas/entry/no_more_unable_to_find) to get the other certificate appears to be a good example.

---

- 6 Make sure you use `ldaps://ldap.company.com:636` as the LDAP URL, rather than the default `ldap://ldap.company.com:389` (note protocol and port number changes).

## 1.10 Mail Setup

ICEcore e-mail integration is divided into two primary functions:

1. Notification - e-mail messages generated by ICEcore to inform people of events (e.g., new entries, changes) occurring within ICEcore.
2. Posting - the processing of e-mail messages sent to ICEcore with the intent of having the e-mail content added to a particular folder (as a new entry or reply).

### System Configuration

As part of installing and configuring ICEcore, the system administrator must supply information related to the address and access to the mail system. E-mail integration is not required and you can configure the level of integration.

The `installer.xml` file contains sections on e-mail configuration for both notification (Outbound) and posting (Inbound).

Outbound configuration requires the basic information for generating SMTP mail messages: server, port, and optional authentication information.

ICEcore posting works by the system accessing a single e-mail account (sometimes referred to as the “posting account”). Using your e-mail system, multiple e-mail addresses (aliases) can be mapped to this account. ICEcore periodically reads e-mail sent to this account and forwards the messages to individual folders (more on this below).

Create the account using your normal e-mail system management tools. You can configure the posting account to use either POP3 or IMAP. ICEcore needs a host, port, e-mail account id, and password for the posting feature to work.

### **Setting up Incoming Mail schedule**

In the ICEcore *Administration* portlet, click on the “*Configure site incoming email schedule*” link. This brings up a form that instructs ICEcore how when to check the posting e-mail account. You may choose to poll at specific times during the day or at some regular frequency.

The right-hand side of the setup page lists any aliases and the folder that is using that alias. You set up the alias address to folder mapping within the folders themselves (see next section).

### **Associating an E-mail Address with a Folder**

If you enable incoming e-mail the final step that you need to take is to associate a particular e-mail alias address with a folder. When this is done, e-mail sent to that address is “read” by the folder and turned into entries (or replies).

1. Navigate to the folder you want to receive e-mail and click on the “*Manage this folder*” menu item, then select “*Email settings*”.
2. Enter the e-mail alias address you want to associate with this folder. Click on the *Apply* button to save the address.

You can optionally set up the notification schedule for this folder at the same time (see next section).

### **Establishing a Notification Schedule for a Folder**

You can configure each folder to send out e-mail messages highlighting activity within the folder.

1. Navigate to the folder you want to receive e-mail and click on the “*Manage this folder*” menu item, then select “*Email settings*”.
2. Enable outgoing mail and select the type of schedule you want for notification. You can configure the schedule for specific times of the day or a regular frequency. You also need to specify who is to receive the e-mail. This can be a combination of users, groups, and arbitrary e-mail addresses.
3. Click the *Apply* button to save the schedule.

## 1.11 Memory Guidelines

Java virtual machine uses a memory pool that you can configure at startup time. (You can see `catalina.bat/.sh` for all of Tomcat's startup options).

Memory settings are defined in the `installer.xml` file. The default configuration assumes 1GB is available for the Java virtual machine.

Virtual memory configurations in excess of 2GB for large production environments are common, therefore 64-bit server systems are recommended.

LifeRay has its own (non-trivial) memory pools that needs to be factored in when determining overall memory demands. These are not accounted for in great detail here.

ICEcore memory usage factors:

1. Number of sessions (users logged in)
2. Number of active/concurrent sessions
3. Hibernate cache (database)
4. Lucene cache

The largest and most important of these are the Hibernate and Lucene caches.

### Hibernate Cache

Hibernate is a software framework that manages the mapping between Java objects and relational databases. Consequently, it has a sophisticated cache system that works on top of any database caching mechanisms.

By default ICEcore uses the `ehcache` plug-in, which is a non-clustering cache manager. Fine tuning of the Hibernate cache is done through `ehcache.xml`.

### Lucene Cache

Lucene has a number of tuning parameters. At this time, we have not done any work with them.

## 1.12 Document Support

When a file is uploaded into ICEcore it is processed in a number of ways:

1. Textual content is extracted and sent to the search engine. For some file types (e.g., word processing documents) the textual content is obvious. For others, such as graphics files, there may be little or no textual content beyond basic metadata.
2. If possible, a thumbnail (and scaled image - somewhat larger than a thumbnail) of the file is created. The thumbnail of a multi-page document shows the first page.
3. If possible, an browser-only renderable (HTML) version of the file is created. This allows people who do not have the ability to open the file with its native application to get an idea of what is in the file. The rendering is on a “best effort” basis and the level of detail and fidelity of the rendering varies greatly.

The Open and Enterprise versions of ICEcore vary greatly in their ability to perform the above tasks.

The Open version uses OpenOffice to provide access to common Microsoft and OpenOffice document formats, and that is about it.

The Enterprise version uses a licensed technology from the Stellent\* company (now part of Oracle\*) which provides processing capabilities to a wide spectrum of file types (over 200).

### Editing Support

There are two ways of editing files stored in ICEcore:

1. Download the file to your desktop. Edit the file. Upload the file to the entry (as an attachment). A new version of the attachment is created reflecting your changes. It is possible to manually “lock” the entry if you want to prevent other people from modifying any of the attached files.
2. Certain file types provide an [Edit] button which allows for “edit in place”. When available, clicking on the [Edit] button will launch a small Java applet which, in turn, launches the associated edit program for the file. The program accesses the file stored in ICEcore through WebDAV and is subject to the individual file locking protocols that WebDAV provides. Saving the file (or exiting the application) creates a new version of the attachment - no interaction with the browser is needed.

Because the “edit in place” option requires the WebDAV URL support by the application, which is not universally supported by the operating systems, ICEcore must be configured to know which applications are “WebDAV-aware”.

The following table shows the planned default configuration of file/document support in ICEcore.



Ext	Description	HTML View		Thumbnails		Application		Edit via	Search	
		Open	Ext	Open	Ext	Windows	Linux	WebDAV	Open	Ext
doc	MS Word	?	X		X	winword	ooffice	X	X	X
xls	MS Excel	?	X		X	excel	ooffice	X	X	X
ppt	MS Powerpoint	?	X		X	powerpnt	ooffice	X	X	X
ods	OO Calc	X	X		X	soffice	ooffice	X	X	X
odg	OO Draw	X	X		X	soffice	ooffice	X	X	X
odp	OO Impress	X	X		X	soffice	ooffice	X	X	X
odf	OO Math	X	X		X	soffice	ooffice	X	X	X
odt	OO Writer	X	X		X	soffice	ooffice	X	X	X
sww	OO Text	?	X		X	soffice	ooffice	X	X	X
docx	MS Word 2007		X		X	winword	?	W		X
xlsx	MS Excel 2007		X		X	excel	?	W		X
pptx	MS Powerpoint 2007		X		X	powerpnt	?	W		X
123	Lotus 1-2-3		X		X					X
avi	Windows Multimedia		X		X					X
bmp	Bitmap Graphic		X		X					X
cdr	Corel Draw		X		X					X
cgm	Computer Graphics Metafile		X		X					X
dsf	Micrographix Designer		X		X					X
dwg	AutoCAD Drawing Format		X		X					X
dxf	AutoCAD Exchange Format		X		X					X
gif	Graphics			?	X					X
hpgl	HP Graphics Language		X		X					X
htm	HTML		X		X					X
html	HTML		X		X					X
jpg	Graphics			X	X					X
lwp	Lotus WordPro		X		X					X
mdb	MS Access		X		X					X
mov	QuickTime Movie		X		X					X
mp3	Audio		X		X					X
mpeg	Movie		X		X					X
mpg	Movie		X		X					X
mpp	MS Project		X		X					X
pdf	Adobe Portable Document		X		X					X
png	Graphics			?	X					X
pps	MS Powerpoint		X		X	powerpnt		?		X
ps	Postscript		X		X					X
psd	Adobe Photoshop		X		X					X
qt	QuickTime Movie		X		X					X
rm	Real Movie		X		X					X
rtf	Rich Text Format		X		X					X
tif	Graphics		X		X					X
tiff	Graphics		X		X					X
txt	Text		X		X				X	X
vsd	MS Visio		X		X	??		?		X
wav	Windows Wave Audio		X		X					X
wk1	Lotus Worksheet		X		X					X
wk3	Lotus Worksheet		X		X					X
wk4	Lotus Worksheet		X		X					X
wpd	WordPerfect		X		X					X
xbm	X-Windows Bitmap		X		X					X
xm1	XML		X		X					X
xpm	X-Windows Pixmap		X		X					X
zip	Compressed files (PKZIP)		X		X					X



# Configuring ICEcore

# 2

Before using ICEcore, you need to perform the initial configuration tasks described in this chapter to set up ICEcore so that all default features are operable:

1. [Section 2.1, “Log in as a Manager,” on page 28](#)

After you log in to the management account, you can perform all of the management tasks for ICEcore and the current workspace.

2. [Section 2.2, “Set Access Roles for the Site,” on page 32](#)

You need to decide who can view the zone workspace, which is the initial workspace in the zone's hierarchy.

3. [Section 2.3, “Specify the Outgoing E-Mail Server,” on page 32](#)

You must specify an outgoing e-mail server to be able to invite users to the zone, and to use features such as “I forgot my password,” e-mail notifications, and more.

4. [Section 2.4, “Optional Configuration Choices,” on page 33](#)

There are various optional features that you can enable or disable to change the zone appearance and functionality to meet the needs of your organization's teams.

5. [Section 2.5, “Enable E-mail Notifications,” on page 34](#)

After you provide the e-mail addresses of your users, the software sends users a link to pages that guide them through the registration process.

6. [Section 2.6, “Invite Users to the Zone,” on page 34](#)

Users cannot receive e-mail notification of new or modified entries in a discussion forum until you enable this feature.

7. [Section 2.7, “Facilitate Forum Use,” on page 35](#)

SiteScape provides additional configuration, information-design, and customization information that you can use to enhance your teams' experience of Forum.

## 2.1 Log in as a Manager

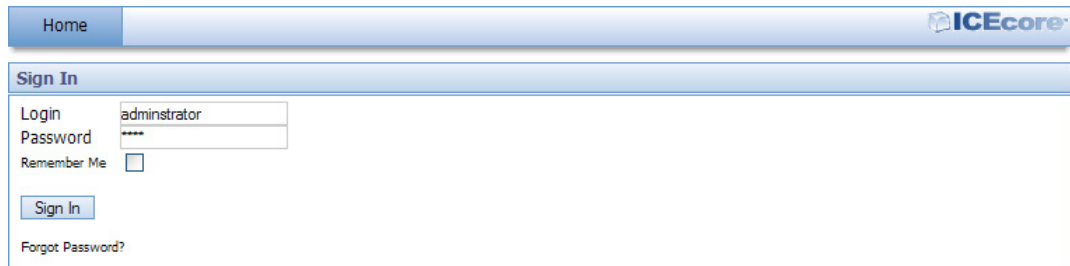
You need to log in using an administrator account in order to set up ICEcore for your users.

### 2.1.1 To Log In Using the Administrator Account:

- 1 Type the ICEcore URL for your company into the browser window:

`http://<yourCompany.com>/ICEcore-site>`

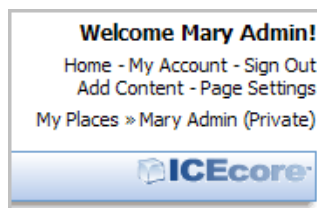
The *Sign In* page appears.



- 2 In the *Login* field, type:  
`administrator`
- 3 In the *Password* field, type:  
`test`
- 4 Click the Login button.

The ICEcore Home Page appears. You are now logged in as administrator.

The LifeRay portal management links are in the upper-right corner of the page below the *Welcome Mary Admin!* text. This is the name associated with the default administration account (*administrator*). When the name appears in the upper-right corner, you are logged into the system. (You can change the name "Mary Admin" by modifying the user profile for the *administration* account.)



When you begin managing ICEcore, there are only two management levels: site managers (who manage the server machine) and portal managers.

By default, *administrator* is the only member of the Administrators group for the LifeRay portal Administrators group. Members of the Administrators group have the right to perform portal management tasks. If you choose, you can add other members to this group, so that they can help manage the portal.

## 2.1.2 Management Levels

Although it is possible have members of the Administrators group manage everything, this strategy becomes problematic as you create more workspaces and folders. At some point, it is helpful to delegate workspace management and the management of individual resources.

The management levels and the default tasks that managers at those levels may perform are:

- ♦ ICEcore Administration

Primarily responsible for working with the ICEcore software so that everything runs smoothly. Tasks include updating the installation on the server, managing users and groups, managing the database server, enabling e-mail for the system, and other technical tasks that come up.

- ♦ Site Managers

Primarily responsible for performing the initial setup of the site, managing users and groups, creating workspaces, delegating management, customizing the site using templates, and assisting the discussion folder managers with the creation of initial custom commands and workflow processes.

- ♦ Team Managers

Responsible for creating and deleting folders in a workspace, determining which folders appear in the workspace, viewing auditing information about the workspace, customizing the workspace using templates, and creating or deleting additional workspaces.

- ♦ Folder Managers

Responsible for managing a single folder. The responsibilities vary according to the type of folder being managed (discussion, calendar, tasks, and so on). Folder managers can modify access controls for the folder and allow or prevent viewing, participation, and other actions.

Managing a discussion folder requires more effort than managing other kinds of folders. These managers are responsible for auditing activity, deleting or moving entries, defining global keywords for users, managing the schedule for e-mail notifications, defining new commands and workflow processes, adding or removing columns in the list of entries, customizing the folder using templates, running reports about content in the discussion folder, and managing the e-mail posting of folder entries.

Additional information about delegating management is available in the online Help system, in the Workspace Organization section.

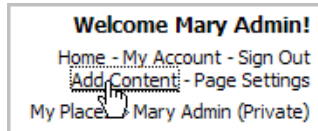
## 2.1.3 Using ICEcore Management Menus

The ICEcore management options are designed to provide you with a maximum amount of flexibility when managing resources for your teams.

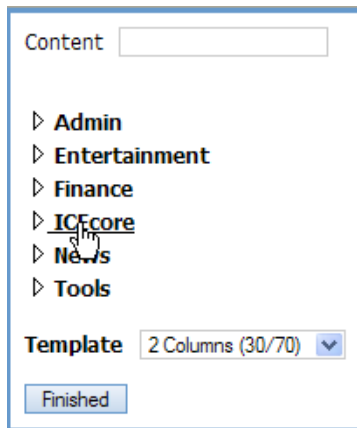
Access the ICEcore management options via the ICEcore *Administration* portlet.

### To Add the ICEcore Administration Portlet to Your Home Page:

- 1 Click *Add Content* in the upper-right corner.



- 2 In the portlet access frame that appears in the upper-left corner, click ICEcore to view the available ICEcore portlets that you can add.

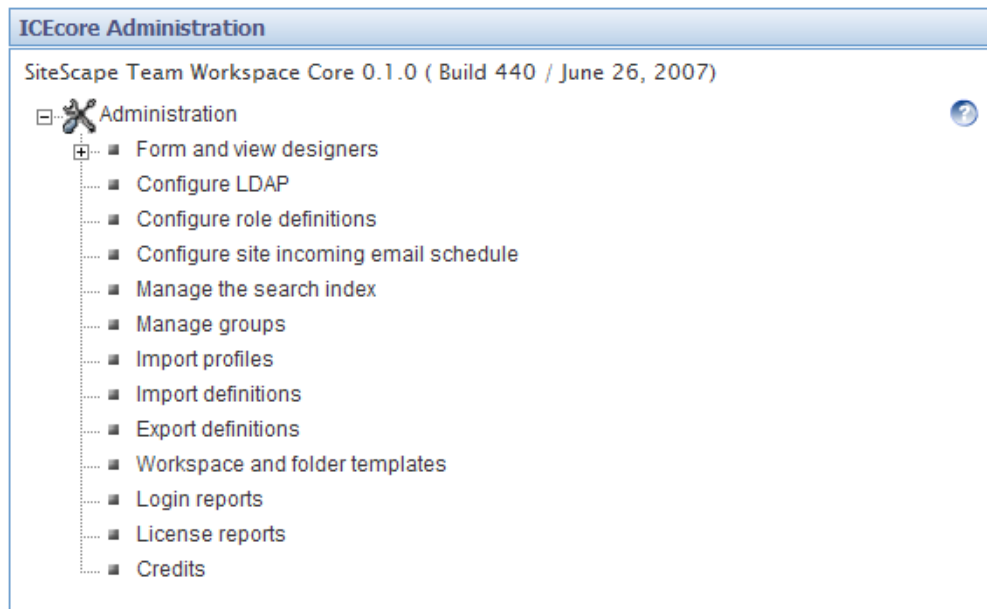


- 3 Click the *Add* button next to ICEcore *Administration* to add this portlet to your Home Page.

---

**NOTE:** The portlet access frame closes automatically and the ICEcore *Administration* portlet appears on your home page. When you add LifeRay portlets (any portlet not under ICEcore) the portlet access frame does not automatically close as it does when you add ICEcore portlets.

---



The ICEcore *Administration* options provides you with access to all the administration tasks controlled by the the ICEcore software.

---

**NOTE:** Because ICEcore is embedded within LifeRay, a portion of user management is delegated to the LifeRay. For example, LifeRay is responsible for all user authentications using the Enterprise Admin portlet.

---

## 2.2 Set Access Roles for the Site

One of your first tasks as a site manager is to set the access roles to control how different users can view and participate in the site workspaces according to what access role they are assigned. For example, you may choose to prevent any visitor from viewing any entries in the site.

### 2.2.1 To Change the Default Access to the Site Workspace:

- 1 From the zone-workspace page, click the *Manage* toolbar item and choose *This workspace*. The zone-management page appears.
- 2 In the "Manage access control" section of the page, click *Set workspace access control*.
- 3 In the *Visitors* column, deselect the *Anonymous users* option to disable anonymous access.
- 4 Click *Remove* selected groups from roles.  
The "*Role-based access control*" page reappears. Anonymous users are no longer in the Visitors role, so they cannot view any pages in the zone.  
To return to the zone-workspace page, click the title at the top of the page.

## 2.3 Specify the Outgoing E-Mail Server

You must specify information about the outgoing e-mail server to enable the following Forum features:

- ♦ I forgot my password (Forum e-mails you a new password)
- ♦ Invite users to the zone
- ♦ Send mail
- ♦ E-mail notifications from discussion forums
- ♦ E-mail notifications related to workflow processes
- ♦ E-mail notifications related to tasks and reminders

### 2.3.1 To specify the outgoing e-mail server:

- 1 From the zone-management page (*Manage > This Workspace*), select *Manage outgoing e-mail settings* in the *Manage e-mail settings* section.
- 2 Specify the name of the computer that runs the outgoing SMTP e-mail server software.  
If you do not know the name, contact your system or network administrator. If the computer on which you installed Forum also runs an e-mail server, specify:  
`localhost`
- 3 Change the default port number if necessary.  
When you complete the form, Forum checks if the server and port information is valid. If it is not correct, contact your system or network administrator.
- 4 Enter a default "from" e-mail address.  
If the SMTP e-mail server determines that it cannot deliver an e-mail message, it returns the message to this address.  
If Forum fails to contact the SMTP e-mail server after one day, an e-mail error log is created. (You can check the error logs from the zone-management page, using the View e-mail error logs link.)
- 5 Click *OK*.



## 2.4 Optional Configuration Choices

There are additional, optional ways that you can configure your zone so that it reflects the values or working style of your organization. You may also want to add greetings or instructions to the pages, so that your zone is more inviting to users. Consider using these management pages:

### **Select features for this zone** (zone-management page)

Allows you to prevent anonymous users from accessing the zone or registering, to prevent users from uploading files, to prevent the use of bookmarks, to disable the "To-do lists" tab, and more.

### **Modify zone name, graphic, fonts, and colors** (zone-management page)

Allows you to change the name of the zone, upload your company logo for display in the banner, set the color theme, and set the font size.

### **Modify workspace appearance** (workspace-management page)

Allows you to change the name of the current workspace, add different greetings for anonymous and registered users, and add text at the bottom of the workspace page.

You can use this page to provide text to orient your users to the zone-workspace page. For example, if you disable anonymous access to the zone, you may want to provide a greeting for anonymous users that includes the e-mail address of the person who can register a username and password for them.

### **Set the message of the day** (workspace-management page)

Allows you to set a brief message for your users that expires after a specified period of time.

### 2.4.1 Making the Forum Inviting for New Users:

- ♦ In the discussion forum, modify the folder abstract to include a welcome to users, a description of the purpose of the forum, and instructions for users about which links to click on. Then, add an introductory entry outlining the subjects to be discussed and perhaps some rules for the forum. Add another entry inviting users to "sign in" by adding replies to introduce themselves.
- ♦ Add some new usage tips to the User Tutorial forum, such as practical advice about using Forum to accomplish tasks specific to your organization.
- ♦ If you are using the version of Forum that includes Zon support, you can create a discussion topic for those who wish to participate in an online meeting, post information to be read or discussed before the meeting, use the UI to start the meeting from Forum, and then post the meeting log and materials back into the topic when the meeting is complete.

## 2.5 Enable E-mail Notifications

One of the most effective ways for users to track new and changed entries in a discussion forum is to have Forum send them e-mail notifications. E-mail notifications provide a summary of recent activities in the forum, along with links to the new or changed entries.

To configure the discussion forum to send e-mail notifications:

- 1 From the discussion forum, access the *Tools* toolbar option, and then click *Administration*.
- 2 In the *E-mail operations* section, click *Set e-mail notification schedule*.
- 3 In the "Set notification message content level" section, click the Send titles only or the Send titles and summaries radio button.

If you choose Send titles and summaries, the e-mail message includes a few lines from the entry. You must specify the number of lines to be included. SiteScape recommends that you specify not more than 10 lines so as not to overload the server.

- 4 In the "Set the mail notification schedule" section, click the checkboxes of the days on which Forum is to send notifications.
- 5 In the same section, specify the time Forum is to send notifications. The times that you specify apply to each day that you selected. Use 24-hour format, and separate the hour value from the minute value using a colon ( : ).

For example, this schedule sends notifications every hour and a half during an average working day, according to the time on the server:

09:00    10:30    12:00    13:30    15:00    16:30

- 6 You can add users to the distribution list. Users can also enable their own notifications from the discussion forum by choosing Set notification from the Tools menu as described in the user Help system.
- 7 At the bottom of the form, click OK.

The e-mail notification schedule is set for this forum.

## 2.6 Invite Users to the Zone

- 1 If your user profile does not include an e-mail address, you must add one so that users can reply to your invitations if they have questions.
- 2 From the workspace page or the "My summary" page, click the Wizards toolbar item.
- 3 On the wizard menu, click the Invite users to join the zone link.

---

**NOTE:** If this link does not appear on the Wizard menu and you are running Forum, you must specify your e-mail server.

---

- 4 Optionally, you can change the default wording of the e-mail message.
- 5 Enter the e-mail addresses of the people you want to invite to the zone. Use one or both of the following methods:
  - ♦ Enter individual addresses in the "E-mail address" text boxes. To add boxes, click More e-mail addresses.
  - ♦ To add a list of e-mail addresses, copy and paste the list to the "You may also enter multiple e-mail addresses..." text box, then separate the addresses with commas.
- 6 Click Next.

**7** Review the information on the Summary page, and then click Finish.

**8** Click Close to exit the Congratulations page.

Your users receive an e-mail invitation with the text you specified and a link to the Forum registration wizard. They use this wizard to provide a username, password, and additional information. After users register, they are logged in to Forum.

## 2.7 Facilitate Forum Use

Now that you have set up your zone, SiteScape recommends that you learn more about facilitating and optimizing the long-range use of Forum by reading the following online manuals:

- ♦ Making Teams Work

This manual covers issues that go beyond management and configuration, to address how to optimize your teams' use of Forum. One primary concept is to balance providing your teams with structure (such as a workspace hierarchy and dedicated applications created before team members ever access the zone) with a more informal, organic process (one in which teams create norms for Forum use and have input to workflow-process definitions). After deployment of Forum, the result should be an online space that your teams find intuitive, helpful in completing work effectively, flexible in ways that match a team's natural agility, and appropriately open to sharing information within the team and across the organization's matrix of teams.

- ♦ Getting Started with Workflow

This tutorial teaches you how to automate your teams' common business processes, and how to use discussion forums to create powerful, dedicated applications.

To access these manuals, open the Help system and click Getting Started Manuals.



# Controlling Access

# 3

SiteScape software provides two methods for controlling access to the zone, workspaces, and forums.

The default method is called role-based access control. Role-based access control associates groups with a set of access rights.

SiteScape's legacy method for controlling access is called managing by rights. This method allows you to map individual rights directly to one or more groups.

This chapter provides information about each type of access-control:

- ♦ [Section 3.1, “Managing by Roles,” on page 37](#)
- ♦ [Section 3.2, “Managing by Rights,” on page 39](#)

More detailed information is available in the Access Control topic in the Manager Help.

## 3.1 Managing by Roles

Role-based access control associates groups with a set of related rights; together, this set of rights defines a role. Each role gives the users in the associated groups permission (or rights) to perform each of the tasks in the set. Role-based access control simplifies and speeds access control, because it allows you to assign a broad, general level of access without requiring you to apply every right individually.

To manage using roles, click the access-control link on the management pages for discussions, chat rooms, calendars, and workspaces.

The default access roles, with their default rights are:

- ♦ Visitors (read only)  
Can view information in the resource (forum, workspace, calendar, and so on), but cannot add information or use other tools that are reserved for higher-level roles.
- ♦ Participants (write)  
Can view information, add information (such as a topic or reply in a discussion forum), and send e-mail to another registered user.
- ♦ Moderators (manage, modify, and delete)  
Can view, modify, or delete all entries, add information, send e-mail to another registered user, and create team workspaces.
- ♦ Managers (manage, modify, and delete)  
Can perform management tasks for the resource, such as using the management menu, controlling access to the resource, creating additional resources such as workspaces, and using advanced tools (such as the tool to send e-mail to all registered users).

Each type of resource has a default set of rights for each role. For example, in a zone, Participants can view forums, send e-mail to registered users, and more; in a discussion forum, Participants can add entries and reply to entries.

You can change the set of rights allowed to each role (the role definition) locally, from within an individual resource, by clicking the Modify rights button, located in the header row of each column. For example, in a discussion forum, you may want to remove the right to send e-mail from the Participants role. Local changes to the role definition apply only to the current forum.

**NOTE:** It is also possible to modify role definitions for all forums of a certain type. For more information, click Access Control in the Manager Help table of contents, and then click Manage Role Definitions.

You can allow a resource to inherit membership (the groups in each role) from its parent workspace. Changes will be applied automatically through the inheritance hierarchy. For example, if you create a new workspace, it can inherit its role definitions from the main workspace.

The following is an example of a "Manage by roles" page, as accessed from the workspace management page:

**SiteScope Forum Access Control**  
 Role-based access control for [SiteScope Forum Workspace](#)

---

A role is defined by a set of access rights, which are allowed to the users in the groups associated with that role. Any changes you make here to role membership (adding or removing groups) or to role rights are local to this forum. To view the sets of rights for all roles in this forum, click the View rights button. [i](#)

Inheritance: This is the top-level workspace. By definition, the top workspace does not inherit role definitions.

Forum owner: [SiteScope Forum Manager](#)

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[View rights](#) | [Define a new role](#) | [Change the forum owner](#) | [Change the session guard settings](#) [i](#) | [Manage by rights](#) [i](#)

Roles: group associations				
Visitors <a href="#">Add groups</a> <a href="#">Modify</a>	Participants <a href="#">Add groups</a> <a href="#">Modify</a>	Moderators <a href="#">Add groups</a> <a href="#">Modify</a>	Managers <a href="#">Add groups</a> <a href="#">Modify</a>	Cinnamon Role <a href="#">Add groups</a> <a href="#">Modify</a>
<input type="checkbox"/> Anonymous users	<input type="checkbox"/> Anonymous users	<input type="checkbox"/> All registered users	<input type="checkbox"/> Forum owner	<input type="checkbox"/> Forum owner
<input type="checkbox"/> All registered users	<input type="checkbox"/> All registered users	<input type="checkbox"/> Forum owner	<input type="checkbox"/> Administrators ( <a href="#">avf_admin</a> )	<input type="checkbox"/> Administrators ( <a href="#">avf_admin</a> )
<input type="checkbox"/> Forum owner	<input type="checkbox"/> Forum owner	<input type="checkbox"/> Administrators ( <a href="#">avf_admin</a> )		
<input type="checkbox"/> Administrators ( <a href="#">avf_admin</a> )	<input type="checkbox"/> Administrators ( <a href="#">avf_admin</a> )			

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[Remove selected groups from roles](#) [i](#)

[Close](#) [Help](#)

For more information about inheriting role membership, view the Access Control topic in the online Manager Help system.

## 3.2 Managing by Rights

Managing by rights is another method for controlling access to resources. When you manage by rights, you work with an "Access Rights" table within an individual resource, such as a workspace or a forum. In the left-most column of the table, group names appear, one group in each row. (Some of the "groups" may be specially defined individual users.) The top row of each table displays the access rights available in that resource, one right in each column. At the intersection of each row and column is a checkbox. When you select or clear the checkbox, you allow or suspend that right for that group.

This method of access control allows you to assign to users the same set of rights you can assign using role-based access control. However, you must use the checkboxes in the table to group similar rights manually. This method is more labor-intensive, and does not offer the inheritance feature.

You can manage any set of resources using this method of access control.

---

**NOTE:** If you upgrade to Version 7.0 from an earlier version, managing by rights is the default method. To use role-based access control, click manage by roles, located toward the top of the page.

---

Below is an example of a "Manage by rights" page, as accessed from the workspace management page:

### 3.2.1 Default Users and Groups

Both methods of access control use a default set of users and groups:

- ♦ Registered Users  
Users who have a registered username.
- ♦ Forum Creator  
The user who created the forum. In this context, a "forum" could be a discussion forum, a specialized forum, a calendar, a workspace, or any of the built-in forums such as tasks or calendars.
- ♦ Forum Owner  
Initially, this is the same person who created the forum. It is possible to assign a new forum owner. You cannot assign a group as the forum owner.
- ♦ Anonymous Users  
Users who are not logged in. These users share one account, whose username is Anonymous.
- ♦ Administrators  
Users who have the right to access the management menus in all resources in the zone. By default, the first members of the Administrators group are the wf\_admin user and the user who created the zone.
- ♦ Entry Creator  
The user who created an entry. In this context, an "entry" could be an entry in a discussion forum, calendar, chat room, meetings forum, or task forum.
- ♦ Entry Owner  
The user who owns an entry. By default, this is the person who created the entry, but a new owner can be assigned.





# ICEcore Glossary

**buddy list**

A list of people that you contact frequently.

**entry**

An item, such as a wiki topic, file, or photo, that is contained in a folder.

**folder**

A container for entries and other folders. Each folder has a type, such as blog, wiki, or calendar, that determines its appearance and features.

**presence**

The state of being connected to a communications service and available for communication. Presence information is indicated by status icons.

**tag**

A keyword that anyone can add to a place to make it easier to find that and related places. Community tags are shared. Personal tags are private.

**tag cloud**

A weighted list of tags in which frequently used tags are displayed in larger type.

**workspace**

A container for folders and other workspaces.