



QuickApps for SharePoint® 6.8 Configuration Editor Guide

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AgreeYa Solutions, Inc.

605 Coolidge Dr.

Folsom, CA 95630


USA


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Legend

 **CAUTION:** A CAUTION icon indicates potential damage to hardware or loss of data if instructions are not followed.

 **WARNING:** A WARNING icon indicates a potential for property damage, personal injury, or death.

 **IMPORTANT NOTE, NOTE, TIP, MOBILE, or VIDEO:** An information icon indicates supporting information.

Contents

| | |
|--|-----------|
| About this Guide | 4 |
| Configuration Editor | 4 |
| Configuring the Web.Config file | 4 |
| Opening the Web.Config file | 5 |
| Configuring the SI Configuration File | 10 |
| Adding a New System | 10 |
| Configuring System Provider Properties | 10 |
| Adding a New Service | 11 |
| Connecting to External Systems | 11 |
| Managing Web Parts in the Configuration Editor | 15 |
| Creating the Complex Category Indexer List | 16 |
| Managing Licenses in the Configuration Editor | 18 |
| About AgreeYa | 20 |
| Contacting AgreeYa | 20 |
| Technical support resources | 20 |

About this Guide

This guide allows you to use Configuration Editor to properly use QuickApps for SharePoint®. For detailed information required to use QuickApps for SharePoint in a commercial environment, see QuickApps for SharePoint User Guide.

This guide is intended for network administrators, consultants, analysts, and any other IT professionals who use the product.

Configuration Editor

QuickApps for SharePoint® require a few modifications in the Web.Config file to operate properly. The Configuration Editor can help you make modifications easily and to prevent errors while doing so.

- NOTE:** Many of the required modifications can be done automatically through the “QuickApps for SharePoint - Configuration” feature accessible from the SharePoint Central Administration page. The required web.config changes happen automatically during feature activation and the changes are removed upon feature de-activation. This method does not support System Integration metadata configuration and other advanced features available in the Configuration Editor tool.

You can perform the following functions using the Configuration Editor:

- [Configuring the Web.Config file](#)
- [Configuring the SI Configuration File](#)
- [Managing Web Parts in the Configuration Editor](#)
- [Creating the Complex Category Indexer List](#)
- [Managing Licenses in the Configuration Editor](#)

Configuring the Web.Config file

The Web.Config file is edited in the Web.Config tab of the Configuration Editor. This tab contains the following sections:

Table 1. Web.Config sections

| Section | Description |
|----------------|---|
| Drop down Menu | Contains menu items to execute operations inside the Configuration Editor. You can also active certain menu item using the shortcut key specified in the menu item, such as Ctrl+O to open the Web.Config file. |
| Toolbar | Gives you shortcuts to frequently used actions within the Configuration Editor. |
| File Tabs | Enable you to switch between the Web.Config file and the System Integration Configuration file. |

Table 1. Web.Config sections

| Section | Description |
|----------------|---|
| Message Window | Informs you if there is an error or missing entries in your configuration file. To fix the error or to add the missing entries, select the error message and click the Fix button. To undo the fix, select the message that describes the fix and click the Undo button |
| Edit Pane | Shows you the content of the file and enables you to edit the content of the file manually |

Opening the Web.Config file

To open the Web.Config file

- 1 Open the Web.Config file.
- 2 Browse to the root folder of your SharePoint application and select the Web.Config file. You can find out the physical path of the root folder of your SharePoint application by following these steps:
 - a Select **Start | Control Panel | Administrative Tools | Internet Information Services (IIS) Manager**.
 - b Expand the node with your computer name.
 - c Expand the Web Sites folder.
 - d Find the node that represents your site. The SharePoint site should contain `_layouts`, `_vti_bin` and `_wpressources` underneath it.
 - e Right-click on the node and select **Properties**.
 - f Select **Home Directory** tab. The value in the Local path tells you the physical path of your root folder.

The file opens in the web.config tab of the editor.

Depending on the state of your Web.Config file, you might see one or more messages in the Message Window. To fix the error or to add the missing element specified by the message, select the message and click the **Fix** button. To undo the fix, select the message that describes the fix and click the **Undo** button.

Enabling Session State

You must enable the session state in your Web.Config for the QuickApps for SharePoint to operate properly. If the session state functionality is turned off, you see the following message in the Message Window:

You must enable session state in your web.config.

To turn the session state functionality on

- Select this message in the window and click **Fix**.

The following line is edited:

```
<pages enableSessionState="false" enableViewState="true"
enableViewStateMac="true" validateRequest="false" />
```

The value of `enableSessionState` is changed from `false` to `true`. The resulting line looks like:

```
<pages enableSessionState="true" enableViewState="true"
```

Enabling Session

In addition to enabling the session state, you must enable the SessionStateModule. If the SessionStateModule is not enabled, the editor displays the following in the Message Window:

The session state module element in the web.config file is missing or invalid.

To enable the SessionStateModule

- Select this message in the window and click **Fix**.

The following line is added and highlighted:

```
<add name="Session" type="System.Web.SessionState.SessionStateModule" />
```

Defining Custom Settings Editor

QuickApps for SharePoint refers to some settings in the Custom Settings Editor in the Web.Config file. Before adding the Custom Settings Editor section, define the Custom Settings Editor section group.

If this section group does not exist in your web.config file, the editor displays the following in the Message Window:

Your web.config file has no Custom Settings Editor section group defined in <configSections>.

To define the Custom Settings Editor section group

- Select the above message in the window and click **Fix**.

The following lines are added and highlighted:

```
<sectionGroup name="Custom Settings Editor">
  <section name="MailSettings"
    type="System.Configuration.SingleTagSectionHandler, System,
    Version=1.0.5000.0, Culture=neutral, PublicKeyToken=b77a5c561934e089" />
  <section name="SystemIntegration"
    type="System.Configuration.SingleTagSectionHandler, System,
    Version=1.0.5000.0, Culture=neutral, PublicKeyToken=b77a5c561934e089" />
</sectionGroup>
```

Defining Custom Settings Editor Section

QuickApps for SharePoint refers to some settings in the Custom Settings Editor section in the Web.Config file. If this section does not exist in your web.config file, the editor displays the following in the Message window:

Your web.config file has no <Custom Settings Editor> section defined.

To define the Custom Settings Editor section

- Select this message in the window and click **Fix**.

OR

Select **Edit | Custom Settings Editor**.

The Custom Settings Editor window appears.

The Custom Settings Editor contains the following:

Table 2. Custom Settings Editor tabs

| Tab | Description |
|------------------|--|
| General | <ul style="list-style-type: none"> Do not display the QuickApps Ribbon: If selected, the Ribbon is not shown. By default, the Ribbon is shown. For more information on the Ribbon, see the Ribbon Group Help chapter of the QuickApps for SharePoint User Guide. In List-mode queries, limit the 'People or Group' field to Users and Groups in the current site: This option affects how the 'People or Group' field is populated in List-mode queries. When selected, only Users and Groups in the current site are included. When not selected (the default), Users and Groups in the Site Collection are included. This option does not affect how users are selected in the People Picker. |
| Email | <p>The computer name or IP address of your outgoing SMTP server. This setting is used by the qListView and qListForm web part's email panel.</p> |
| Rollup and Query | <ul style="list-style-type: none"> Max Rollup Depth: This attribute defines the maximum number of recursive rollup levels that the data viewer web parts can do. The data viewer web parts include qListView, qCalendarView, qChartView, and qExcelViewer. The recursive rollup happens when you set the IncludeSubSites attribute in the Viewed Lists property to true. By default, this causes the data viewer web parts to traverse all the subsites under the site specified by the SiteUrl attribute. If you define a number bigger than 0 in the MaxRollupDepth attribute, the data viewer web part only goes down as many levels as the specified number. Say you have the following site structure: <ul style="list-style-type: none"> Site 1 <ul style="list-style-type: none"> Site 1.1 <ul style="list-style-type: none"> Site 1.1.1 <p>If you specify MaxRollupDepth of 2 and you start the recursive rollup from Site 1, only Site 1 and Site 1.1 are included in the rollup.</p> Max Rollup List Count: This attribute defines the maximum number of lists that can be included in the rollup operation by the data viewer web parts. The data viewer web parts include qListView, qCalendarView, qChartView and qExcelViewer. The value for this attribute must be a number bigger than 0. For example, if you specify MaxRollupListCount of 2, the data viewer web part only rolls up the first 2 lists that are specified in the Viewed Lists property if there are more. This is true regardless what rollup method you use in the Viewed Lists property (specifying the lists manually, recursive rollup or rollup list). Max Query Row Count: This attribute defines the maximum number of rows that can be retrieved during any query to the SharePoint server. The default value is 2000. Entering another value will override the default value and if you enter 0 then it will show all the list values. Query All Fields: If selected, Web Parts will query all fields, except Lookup Fields. If cleared, the Web Part will use the Query All Fields setting in ezEdit to decide how to query the fields. |
| Editor | <ul style="list-style-type: none"> Maximum Image Size: the maximum file size in bytes allowed when inserting images using the rich text editor. Supported File Extensions: The list of file extensions allowed when uploading and adding documents using the enhanced rich text editor. The list of extensions need to be separated by commas. If no input is given, the default file extensions are used; these are *.doc, *.txt, *.docx, *.xls, *.xlsx, *.pdf. |

Table 2. Custom Settings Editor tabs

| Tab | Description |
|--------------------|---|
| System Integration | <ul style="list-style-type: none"><li data-bbox="547 275 1382 360">• SI Config File: The full path to the system integration configuration file. The relative path does not work. If the file has not been created, select the path as to which you would like it to reside.<li data-bbox="547 371 1382 573">• Dynamic Assembly Path: During its operation, the SI Web Parts need to generate proxy DLLs for the Web Services (if you connect to your external service using Web Services). By default, these DLLs are generated in c:\Windows\Temp folder. If you want the DLLs to be generated in another location, you can specify the full path of the folder name here. The user identity that you specify in the web application pool in IIS must have full access to this folder.<li data-bbox="547 584 1382 640">• Enable Trace: If you turn this on, the SI Web Parts generate additional information when an error occurred during its operation. |

Once the above fields are filled out, select **OK**.

If the SI Configuration file specified in the Editor does not exist, the editor displays the following error in the Message Window:

"The SI Configuration file specified in the metadata attribute does not exist. Select this message and click Fix to create it."

To create the file, select this message in the window and click Fix.

Table 2. Custom Settings Editor tabs

| Tab | Description |
|------------------|---|
| Complex Category | <p>The category name is case sensitive: If this setting is checked, "CATEGORY" and "category" are considered two different categories. If not defined, the default value of this setting is false.</p> <p>Trim the white spaces in the category name: If this setting is checked, "Category", " Category", "Category " and " Category " are considered identical categories. If not defined, the default value of this setting is false.</p> <p>Default Blank Category Name: This entry displays in the qDiscussionView when it encounters a discussion with a blank category name. The default for this field is "(Not Categorized)" if it is not set in the web.config.</p> <p>The first two settings affect how the qDiscussionView and qListForm match the values of the complex category field with the categories that are defined in the index list. It also affects the creation of the new category. For example:</p> <ul style="list-style-type: none"> If the category name is case sensitive, the user cannot create a new category called "Category1" if "CATEGORY1" already exists in the index list. This setting does not modify the new category name that you enter when saving it. It does not modify the name that you enter into all lower case or upper case. This setting affects the comparison with the existing category name in the index list. <p>If the trim white spaces is set to true, the user cannot create a new category called " Category1 " if "Category1" already exists in the index list. This setting trims the leading and trailing white spaces from the category name that you enter when saving it.</p> <p>How the qDiscussionView and the qListForm handles white spaces in the category name is important when the "Trim White Spaces" settings is set to false and multiple categories are specified in the complex category field. Consider the following examples and see how the qDiscussionView and the qListForm web parts tokenize the complex category values:</p> <ol style="list-style-type: none"> Category1,Category2 (there is not a space after the comma) The category names are "Category1" and "Category2" Category1, Category2 (there is one space after the comma) The category names are "Category1" and "Category2". This means the first space after the comma is ignored because it is customary that people put one space after the comma for readability purpose. Category1, Category2 (there are two spaces after the comma) The category names are "Category1" and " Category2" (there is one space in front of Category2). This is because the first space after comma is ignored. This means that if you have three spaces after the comma, the category name has two spaces in front of it, and so on. Category1\Category2 (there is not a space after the back slash) The first level category name is "Category1" and the second level category name is "Category2" Category1\ Category2 (there is one space after the back slash) The first level category name is "Category1" and the second level category name is " Category2". Unlike the spaces after the comma, all the spaces after the back slash counts. <p>The option, Delete the existing categories from the index list, controls whether all the list items in the Complex Category Index List are deleted or just reset (clear or reset Discussions and Discussion Count field). This option is not saved to the web.config.</p> |

Configuring the SI Configuration File

The SI Configuration file contains the information about the external systems you want to integrate with and the services that are available within the systems. The SI configuration file may contain one or more System elements. A System may consist of one or more Service elements.

The SI Configuration File is automatically opened when you open a Web.Config file that contains the full path to the SI Configuration File in its System Integration Config Settings, or by selecting File | Open | SI Configuration File.

This tab contains the following sections:

Table 3. SI Configuration File sections

| Section | Description |
|---------------------|---|
| Design and XML Tabs | Enable you switch between the Design mode and XML mode when editing the SI Configuration file. The Design mode provides a graphical user interface to edit you SI Configuration file. The XML mode shows you the content of your SI Configuration file and lets you edit the content manually |
| Tree Panel | Shows the tree representation of the content of your SI Configuration file. |
| Property Panel | Shows you the properties of the selected element. For example, when you select a System node in the tree panel, the Property Panel shows you the properties for that system. |

Adding a New System

To add a new system

- 1 Right-click the Systems node in the Tree Panel.
- 2 Click **Add System**. The new System node is highlighted.
When you create a new SI Configuration file, a new System node called Untitled is created automatically.
- 3 Use the default built-in system provider to use the services provided by the System type configured in the web.config file
OR
Clear this check box to specify your own custom provider implementation. See the System Integration Developer Guide for more information.

Configuring System Provider Properties

The DAOProvider Property Name, Property Type, and Property Value are automatically filled in when you select a system. You can add properties from your custom provider.

To add new properties

- 1 Right-click the Properties node in the Tree Panel.
- 2 Click **Add Property**. The new Property node is highlighted.
For each property node, you must define:
 - Property Name: The name of the property as dictated by your DAO Provider.
 - Property Type: The type of the property as dictated by your DAO Provider, for example.: System.String.
 - Property Value: The value of the property as dictated by your DAO Provider.

Adding a New Service

To add a new service

- 1 Right-click the Services node in the Tree Panel.
- 2 Click **Add Service**.

The services available depend on the system type you have selected.

Connecting to External Systems

You can connect to the following system types:

- [SQL Server®](#)
- [WebServices](#)
- [DominoXMLOverHTTP](#)
- [Oracle®](#)
- [K2®Server](#)
- [Salesforce®](#)
- [Custom](#)

SQL Server®

Use this system type to connect to SQL Server using ADO.NET. You must specify the Connection String in the Service Settings when you use this type.

The service settings available with the SQL Server system type include:

Table 4. SQL Server Service Settings

| Service Settings | Description |
|-------------------|--|
| Service Name | The name for the service |
| Connection String | A connection string that includes the source database name, and other parameters needed to establish a connection. NOTE: If you want to connect to SQL Server with a specific user name and password, enter the following as the Connection String: Data Source=serverName;Initial Catalog=databaseName. Afterward, enter the User ID and Password. NOTE: If you want to connect to SQL Server using the credential of the logged in user to connect to SQL Server 2005, enter the following as the Connection String: Data Source=serverName;Initial Catalog=databaseName;Integrated Security=SSPI;. You should leave the User ID and Password blank for the trusted connection string. If your SharePoint server is installed in a separate computer than your SQL Server, you must have Kerberos setup in your network environment and SharePoint. Otherwise, you cannot connect to the SQL Server due to the double hop issue. |
| User ID | The User ID of your SQL Server login account. |
| Password | The password of your SQL Server login account. |

WebServices

Use this system type to connect to a web service interface in your external system. You must define the system settings and proxy settings for the WebServices system type. Use this system type if you are integrating with Dell Boomi™. For more information, see the SI Developer Guide.

Table 5. WebServices System Properties

| System Settings | Description |
|---------------------|--|
| Authentication Mode | The authentication mode that is used when the DAO Provider connects to the external system. Can be: <ul style="list-style-type: none"> • Passthrough: The credential of the current user is used to authenticate to the external system. • WindowsCredential: If you select this option, you must define the Domain, User and Password that is used to authenticate to the external system. The Password is encrypted in your SI Configuration File. |
| Domain | Domain of the external system account |
| User | The user name of the external system account |
| Password | The password of the external system account |

Table 6. WebServices Proxy Settings

| Proxy Settings | Description |
|----------------------|--|
| Proxy Server Address | The computer name or IP address of your proxy server, for example.: proxy.mydomain.com |
| Proxy Server Port | The port number to connect to your proxy server, for example: 8080 |
| Domain | Domain of the proxy server account |
| User | The User name of the proxy server account |
| Password | The password of the proxy server account |

Table 7. WebServices Service Settings

| Service Settings | Description |
|------------------|---|
| Service Name | The name for the service |
| WSDL | The URL to get the Web Service Definition Language (WSDL) document. You need to specify this if you select the System Type of WebServices. The value is normally in this format: http://...?WSDL. You can test the validity of the URL by clicking the Test Connection button. If the WSDL and the Authentication Mode in the System are specified correctly, you should see Connection Successful message. |
| Protocol | Select either SOAP for SOAP 1.1 or SOAP12 for SOAP 1.2. NOTE: For Boomi, select SOAP. |

Table 8. WebServices Advanced Settings

| Advanced Setting | Description |
|--------------------------------------|--|
| Generate Dynamic Proxy Automatically | This is the default behavior to automatically generate the proxy assembly for a web services system. To manually generate the proxy assembly, clear this check box. If cleared, the following are shown: <ul style="list-style-type: none"> • Proxy Assembly Path - the web services proxy assembly path. To browse to the assembly path, click the Browse button. You can also build the proxy manually by clicking the Generate Proxy Assembly button. This builds the proxy assembly similar to the dynamic proxy assembly building. <p>When Generate Dynamic Proxy Automatically is cleared and a valid path to the proxy assembly DLL is specified, the SI system/service is invoked using the specified DLL instead of being dynamically generated.</p> <p>NOTE: If you want to change the proxy assembly path, you can specify a different path by selecting Edit Custom Settings Editor. Select the System Integration tab. Enter a different path in the Dynamic Assembly Path field.</p> |

DominoXMLOverHTTP

Use this system type to connect to the Domino® Server using XML over HTTP protocol. You must specify the URL to your Domino Server in the Service Settings when you use this type.

Table 9. DominoXMLOverHTTP System Settings

| System Settings | Description |
|---------------------|---|
| Authentication Mode | The authentication mode that is used when the DAO Provider connects to the external system. Can be: <ul style="list-style-type: none">• Passthrough: The credential of the current user is used to authenticate to the external system.• WindowsCredential: If you select this option, you must define the Domain, User and Password that is used to authenticate to the external system. The Password is encrypted in your SI Configuration File. |
| Domain | Domain of the external system account |
| User | The User name of the external system account |
| Password | The password of the external system account |

Table 10. DominoXMLOverHTTP Proxy Settings

| Proxy Setting | Description |
|----------------------|---|
| Proxy Server Address | The computer name or IP address of your proxy server, for example.: proxy.agreeya.com |
| Proxy Server Port | The port number to connect to your proxy server, for example: 8080 |
| Domain | Domain of the proxy server account |
| User | The User name of the proxy server account |
| Password | The password of the proxy server account |

Table 11. DominoXMLOverHTTP Service Settings

| Service Settings | Description |
|------------------|---|
| Service Name | The name for the service |
| URL | The URL for the Domino server. You do not have to enter the full URL. You only have to enter the static part of your URL., for example: http://mydomino.net/Invoice. The remainder of the URL (the dynamic part) is specified in the Catalog property of your SI Web Parts. |

Oracle®

Use this system to connect to Oracle using dotConnect for Oracle. You must specify the Connection String in the Service Settings when you use Oracle.

Table 12. Oracle Service Settings

| Service Settings | Description |
|-------------------|--|
| Service Name | The name for the service |
| Connection String | A connection string that includes the source database name, and other parameters needed to establish a connection. NOTE: If you want to connect to Oracle with a specific user name and password, enter the following as the Connection String: Host=xxx;SID=xxx;Direct=true. Afterwards, enter the User ID and Password. If you have the Oracle client installed, you can use the "Direct=false" flag. If you do not have the Oracle client installed, make sure "Direct=true" is specified in the connection string. NOTE: If you want to connect to Oracle using Windows® authentication, you may use the same connection string as above and leave the User ID and Password blank. |
| User ID | The User ID of your Oracle login account. |
| Password | The password of your Oracle login account. |

K2® Server

Use this system type to integrate with K2 blackpearl® - a platform which allows you to create comprehensive business process applications for SharePoint without coding. For more information on configuring SI web parts with the K2, see the SI Developer Guide.


 **NOTE:** The K2Server system type is available on SharePoint 2010 only.

Table 13. K2 Service Settings

| Service Settings | Description |
|------------------|--------------------------|
| Service Name | The name for the service |
| Server Name | The K2 Server name. |

Salesforce®

Use this system type to integrate with Salesforce.com®. For more information on configuring SI web parts with the Salesforce, see the System Integration Developer Guide.

Table 14. Salesforce Proxy Settings

| Proxy Setting | Description |
|----------------------|---|
| Proxy Server Address | The computer name or IP address of your proxy server, for example.: proxy.agreeya.com |
| Proxy Server Port | The port number to connect to your proxy server, for example: 8080 |
| Domain | Domain of the proxy server account |
| User | The User name of the proxy server account |
| Password | The password of the proxy server account |

Table 15. Salesforce Service Settings

| Service Settings | Description |
|------------------|---|
| Service Name | The name for the service |
| User ID | The user ID for the Salesforce account |
| Password | The password for the Salesforce account |

Table 15. Salesforce Service Settings

| Service Settings | Description |
|------------------|--|
| Security Token | The security token tied to your Salesforce account. This is optional. See the System Integration Developer Guide for more information. |
| Enterprise WSDL | The Enterprise Web Services Description Language (WSDL) document generated from Salesforce. |

Table 16. Salesforce Advanced Settings

| Advanced Settings | Description |
|--------------------------------------|---|
| Generate Dynamic Proxy Automatically | <p>This is the default behavior to automatically generate the proxy assembly for a Salesforce system. To manually generate the proxy assembly, clear this check box. If cleared, the following are shown:</p> <ul style="list-style-type: none">Proxy Assembly Path - the web services proxy assembly path. To browse to the assembly path, click the Browse button. You can also build the proxy manually by clicking the Generate Proxy Assembly button. This builds the proxy assembly similar to the dynamic proxy assembly building but it fixes issues with systems such as SAP web services. <p>When Generate Dynamic Proxy Automatically is cleared and a valid path to the proxy assembly DLL is specified, the SI system/service is invoked using the specified DLL instead of being dynamically generated.</p> <p>NOTE: If you want to change the proxy assembly path, you can specify a different path by selecting Edit Custom Settings Editor. Select the System Integration tab. Enter a different path in the Dynamic Assembly Path field.</p> |

Custom

Use this system type to add your own custom system and services. You must add the custom system provider and a service name.

Managing Web Parts in the Configuration Editor

By default, when you install QuickApps for SharePoint and activate the QuickApps for SharePoint - Web Parts Library, we add Web Parts to the web part gallery making it available for site designers to use. All web parts that are allowed by the user license are available.

As the Farm Administrator, you can further refine what Web Parts are available using the Web Parts Manager.

You can access the Web Parts Manager from Tools | Web Parts Manager.

Table 17. Web Parts Manager Options

| Options | Description |
|---|---|
| Manage Web Parts by Web Application | Allows you to control what web parts become available to the selected SharePoint Web Application. If you clear all the web parts, none of the web parts is available to the specified SharePoint Web Application and all its site collections and subsites. Even though the QuickApps for SharePoint - Web Parts Library is still displayed in the Site Feature list, activating it does not make these web parts available to the site designer. |
| Manage Web Parts by Site Collection | Allows you to manage web parts at the Web Application/Site Collection level. You need to pick the SharePoint Web Application first, then pick the site collections. The display shows you what web parts are available based on your license type and bundle. The checked web parts are the ones available to the site designer. If you chose the option 'Manage Web Parts by Site Collection', select which SharePoint Web Application and Site Collection you want to use. Once you have made your selection, you can configure QuickApps for SharePoint now or later. |
| Manage Web Parts by Multiple Site Collections | Allows you to manage web parts at the Web Application/Site Collection level. You need to pick the SharePoint Web Application first, then pick the site collections. The display shows you what web parts are available based on your license type and bundle. The checked web parts are the ones available to the site designer. If you chose the option 'Manage Web Parts by Multiple Site Collection', select which SharePoint Web Application and Site Collections you want to use. Once you have made your selections, you can configure QuickApps for SharePoint now or later. |
| Backup QuickApps for SharePoint - Web Parts Library | Allows you to backup and save your existing site collections. When you uninstall QuickApps for SharePoint, all features are deactivated. After you upgrade or install a new version of QuickApps for SharePoint, your features are reactivated when you deploy QuickApps for SharePoint. If you choose this option, you can choose a file name and location of where to save your site collections. |

Creating the Complex Category Indexer List

The goals of the Complex Category Indexer are to:

- 1 Create the initial complex category index list for the new discussion lists that were migrated from another system, such as Lotus Notes.
- 2 Repair the complex category index list (deletes the existing contents of the index list and repopulates it).

The Indexer is accessed from the top menu Tools | Complex Category Indexer.

The Complex Category Indexer menu item allows you to create or repair the index list. Clicking the Complex Category Indexer menu item opens the Complex Category Indexer wizard.

The Search tab walks you through the steps of selecting the discussion lists from SharePoint that need to be included in the complex category index and creating the index. The Tasks tab allows you to rerun an index that was previously defined in order to recreate or repair the existing index.

To use the Complex Category Indexer

- 1 From the Search tab, select the starting URL of the site collection or web application that contains the discussion lists to be indexed. You can either select from the SharePoint web application dropdown list or from the site collection dropdown list.
- 2 Enter the search criteria to match the list names on. Select one of the operators in the dropdown: "equals to" and "contains".
- 3 Enter text to match the list name. This search criteria is optional.

4 Click **Next**.

All matched lists in a tree hierarchical structure are displayed. From the top of the tree is the SharePoint web application node, then site collection node, then site and subsite and matched discussion lists nodes.

5 Select the lists that need to be added to the index. You can select the parent node which automatically selects all child nodes. You can check and clear nodes to make your final selection.

6 Click **Next**.

7 Select your options.

- The category name is case sensitive: If this setting is checked, "CATEGORY" and "category" are considered two different categories. If not defined, the default value of this setting is false.
- Trim the white spaces in the category name: If this setting is checked, "Category", " Category", "Category " and " Category " are considered identical categories. If not defined, the default value of this setting is false.
- Default Blank Category Name: This entry displays in the qDiscussionView when it encounters a discussion with a blank category name. The default for this field is "(Not Categorized)" if it is not set in the web.config.
- These three settings are saved into the DellSoftware\ComplexCategory section of the web.config.
- Delete the existing categories from the index list: controls whether all the list items in the Complex Category Index List are deleted or just reset (clear or reset Discussions and Discussion Count field). This option is not saved to the web.config.
- For more detailed information on these settings, see [Configuring the SI Configuration File](#) on page 10.

8 Click **Next**.

Discussion lists display, as well as the options you have chosen.

9 Review your selections before proceeding. Use the **Back** button to go back and make any changes. Once you are satisfied with your selections, click **Next** to continue.

10 Either:

- Click **Start Now** to index all of the lists now.

OR

Click **Schedule** to run it at a later date/time.

You may make changes in this list by clicking the "Action" column. Depending on the current status of the list, you can choose "Create", "Repair" or "None". "None" means bypass the action and do not perform a "Create" or "Repair" on the selected discussion list.

If you choose to schedule the job to run at a later time by clicking **Schedule**, the Index Schedule window appears.

The Scheduled Task(s) tab allows you to view index processes that are already scheduled.

The Completed Task(s) tab allows you to view index processes that have already been run.

You can view the process log by clicking the link in the Result column.

NOTE: If you close the Configuration Editor and there is a scheduled job pending, the application minimizes to the system tray icon with a tool tip indicating that the application is still running. You may click the context menu of the system tray icon to "Restore" or "Exit". When "Exit" is clicked, the application exits and the scheduled job does not run. When "Restore" is clicked, it displays information about the job (running, completed).

The Log tab of the Indexer Log Viewer, shows the log and its details.

The Search tab of the Indexer Log Viewer, allows you to search for logs using several different criteria.

Managing Licenses in the Configuration Editor

You can import multiple license files or single license file to a farm and apply licenses to your servers within that farm.

NOTE: If no license is provided, you will automatically have a 30-day trial license. QuickApps for SharePoint will work for 30 days from the installation date as a fully bundled package. After 30 days QuickApps for SharePoint will display a “License Expired” message.

When removing a license, you can either revoke the license from a server and reapply it later, or remove the license file from the farm.

NOTE: An iisreset occurs automatically every time you apply, revoke, or remove a QuickApps for SharePoint license. These actions will cause SharePoint applications running on the concerned servers in the farm to go down for a while. This may cause a downtime for SharePoint applications during these licensing activities.

To import a valid license file

- 1 You can access the QuickApps for SharePoint License Management window from **Tools | License Manager**.

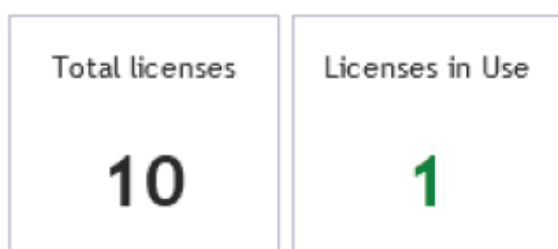
The License window opens and contains two tabs:

- the License View tab which allows you to import a multi-license file or a single license file to a farm, and then select which servers are licensed with the license file
- Server View tab which allows you to view the licenses applied to a server. You can remove or revoke licenses from either tab.

- 2 Search for and select a license file (*.dly), then click **Import**.
- 3 Select the license file from the drop-down list.
- 4 Select which servers you want to license or select the **Servers available to be licensed** check box to select all servers listed. Click **Apply**.

You can see the total number of licenses within the selected license file and the number of servers that have a license (from the selected license file) applied.

Figure 1. Total Number of Licenses vs Licenses in Use



To revoke a license from a server

- 1 From the License View tab, select the server whose license you want to remove, or select the **Servers licensed with this file** check box to select all servers which currently use the license file.
- 2 Click **Revoke**.

OR

- 1 From the Server View tab, select a server.
- 2 Click **Revoke** from the license details section.

If you have multiple licenses, you will see all the licenses in the farm. Click **Revoke** on any or all of the licenses.

To remove a license file

- 1 From the License View tab, select a license file from the drop-down list.
- 2 Click **Remove License File**.

The license file and associated licenses within that file are removed from all servers in the farm.

About AgreeYa

AgreeYa Solutions is a global provider of software, solutions, and services focused on deploying business-driven, technology-enabled solutions that create next-generation competitive advantages for customers. Headquartered in Folsom, California, AgreeYa is a growing and dynamic organization with 15 offices in 8 countries employing more than 1,300 professionals. Over the last 15 years, AgreeYa has worked with 200+ companies ranging from Fortune 100 firms to small and large businesses, delivering solutions for variety of industries including telecommunications, BFSI, healthcare, high-tech, manufacturing, utility and government. AgreeYa's software portfolio includes SocialXtend (intranet and enterprise social collaboration), VDIXtend (Desktop-on-Cloud), Onvelop (enterprise mobility productivity suite), Edvelop (single window collaboration and communication solution for 21st century learning) and Cogent (comprehensive end-to-end case management solution for collections agencies and law firms). As part of its solutions and services offerings, AgreeYa provides intranet and enterprise collaboration on SharePoint, cloud and infrastructure, enterprise mobility, product engineering, application development and management, independent software testing, and staffing (IT and risk/compliance) solutions. For more information visit www.agreeya.com

Contacting AgreeYa

Technical support:

[Online support](#)

Product questions and sales:

1-800-AGREEYA

Email:

quickapps@agreeya.com

Technical support resources

Technical support is available to customers who have purchased AgreeYa software with a valid maintenance contract and to customers who have trial versions. To access the Support Portal, go to <http://www.quickapps.agreeya/support/>.

The Support Portal provides self-help tools you can use to solve problems quickly and independently, 24 hours a day, 365 days a year. In addition, the portal provides direct access to product support engineers through an online Service Request system.

The site enables you to:

- Create, update, and manage Service Requests (cases)
- View Knowledge Base articles
- Obtain product notifications
- Download software. For trial software, go to [Trial Downloads](#).
- View how-to videos
- Engage in community discussions
- Chat with a support engineer