



ONTOLICA SEARCH & PREVIEW 2010 QUICK START GUIDE

INSTALLATION

Before beginning the installation, please take a moment to review the hardware and software requirements in the document called “Hardware and Software Requirements for Ontolica”. It outlines the requirements and prerequisites for all Ontolica products.

To install the Ontolica Suite or individual solutions, run the **Setup.exe** program from the main folder of the installation package on one of the Web front-end servers in your SharePoint farm, preferably where the SharePoint Central Administration site is hosted. Please note, the Ontolica Preview solution requires the Ontolica Search solution also to be installed. Uninstalling the Ontolica Search solution automatically uninstalls the Ontolica Preview solution. Ontolica solutions can be installed to some or all Web applications that exist in a SharePoint farm. Ontolica features will be available only to those Web applications to which they are deployed.

To deploy an Ontolica solution to an additional Web application at a later time go to **Central Administration > System Settings > Manage farm solutions**. Click on an Ontolica WSP solution file to be deployed. On the **Solution Properties** page click the **Deploy Solution** link to deploy the solution to a selected Web application.

The Ontolica Preview solution requires the Ontolica Preview **Gatherer** and **Conversion** services to be installed. Installer for these services is located in the **Preview Back-end Installer** folder. These services handle crawling, creating preview images of documents, extracting text, as well as live creation of preview images for documents with highlighting search terms. You need to run this installer on one of the farm servers and install the Gatherer service. It is recommended to install it on an application server. Furthermore, one or more conversion services need to be installed. They can either be located on the farm or on servers outside the farm. Please verify that the installed conversion services are registered by Ontolica, by logging into the Central Administration and go to “General Application Settings -> Manage Ontolica Modules -> Manage Load Balancing”.

These services must be running for the proper operation of the Ontolica Preview. (See the Ontolica Preview section below).

Please note that this Quick Start Guide is not the full documentation of the Ontolica products. For the complete documentation please visit <http://support.surfray.com>

ONTOLICA SEARCH

ACTIVATING ONTOLICA FEATURES

All Ontolica farm-wide features are automatically activated at the SharePoint farm level and this can be verified at **Central Administration > System Settings > Manage farm features**. If you are upgrading Ontolica solutions from earlier versions, then after you have run the Ontolica setup, you will need to deactivate and then reactivate the Ontolica features.

The farm-wide Ontolica configuration pages can be accessed via the **Central Administration > General Application Settings > Manage Ontolica Modules** page. Links to the Ontolica Search site collection and site level configuration pages are located in the **Site Settings** pages of site collections and sites. Configuration settings at higher levels are automatically inherited at lower levels in the hierarchy, but those settings can be overridden.

SETTING ACTIVE LICENSE

The installation process automatically activates the free evaluation license that comes with the installer. This license enables Ontolica Search for 30 days. To apply a production or development license go to **General Application Settings > Manage Ontolica Licenses**. Please remember to set the license as active after uploading, as well as to backup your licenses in a safe location.

CREATING ONTOLICA SEARCH CENTER

An Ontollica Search Center can be created in a given site collection after activating the **Ontollica Search** feature for that site collection. The feature is activated at **site collection root site > Site Actions > Site Settings > Site collection features**.

To create an Ontollica Search Center, please go to the root site of site collection. Then click **Site Actions** and select **New Site** or **More Options**. On the **Create** window locate one of the Ontollica site templates: **Ontollica Search Center** or **Ontollica Search Center Publishing**. The publishing version allows easy creation of additional search and search results pages for an Ontollica Search Center if needed. Please note, to be able to use the Ontollica Search Center Publishing template you need to make sure that the **SharePoint Sever Publishing Infrastructure** feature is enabled at the site collection level. If Ontollica templates are not available in the list of templates, please make sure that Ontollica features are enabled as described above and an appropriate SharePoint language pack is installed according to the list of languages supported by Ontollica (see full documentation).

CONFIGURING ONTOLICA SEARCH BOX

To enable the Ontollica Search Box, please go to **Central Administration > Application Management > Manage Web Application**. Select the Web application from the list and then click on the **Manage Features** option on the ribbon. On the **Manage Web Application Features** window click on the **Activate** button next to the **Ontollica Search Box** feature.

To associate the Ontollica Search Box with already created Ontollica Search Center go to **Central Administration > General Application Settings > Manage Ontollica modules > Manage Search Box Settings**. On the Search Box Settings page click on the **Settings** button on the toolbar, and make sure that **Site URL** field in the Target Search Center is set to: **~sitecollection/<Ontollica Search Center Path>**. To modify Ontollica Search Box inherited settings at the site collection or site level go to **Site Actions > Site Settings > Ontollica search box scopes**.

CONFIGURING ONTOLICA CUBE FEATURE

The following steps are required to configure the **Ontollica Cube**, which is needed by the Ontollica Search context-aware features: **Auto-suggestions, Related Queries Web Part, and Tag Cloud Web Part**. Ontollica Cube can also provide reporting functionality if the Microsoft SQL Server Analysis Services (SSAS) is available. Using the SSAS Ontollica Cube enables creating custom reports on search, storage and related statistics from SharePoint that can be viewed using third party software such as Microsoft Excel. If the Ontollica Cube feature is to be used only for Ontollica search context-aware features, the SSAS support is not required. Please check the system requirements document.

To start please go to **Central Administration > General Application Settings > Manage Ontollica Modules > Manage Ontollica Cube Database** and install the Cube database by providing appropriate database access credentials.

To enter information about the domains, from which users will be accessing Ontollica Search pages, go to **Manage Ontollica Modules > Data Processing Settings**. If domains have alternative NetBIOS names, these names also need to be entered with the same IDs as for the fully qualified domain names. This will indicate that the same domain/sub-domain can be referred to using two alternative names. The default domain entries listed on the page should be kept.

To be able to use the context-aware features, all data providers need to be processed. To schedule data providers go to **Manage Ontollica Modules > Schedule Data Providers**. On the **Schedule Data Providers** page either choose the **Start Processing Now** option for each listed provider or click on the **Process All** option to process all providers at once. Data providers can also be scheduled for automatic processing on the same page. It is recommended to processes providers not more than once per day. However some providers may initially need to be processed twice to ensure that all data is processed completely. Note that data for some providers is logged at 24 hour intervals.

You can observe the data processing status on the **Data Processing Status** page. The **Data Import Status** table displays rows of data for each provider. After successful processing, all values from the **Row Count** column in the **Temporary Database Usage** table will be set to 0, and **Data Warehouse** usage table will be filled with processed data counts. In case data values persist in the temporary table, make sure to check the configurations done on the **Data Processing Settings** page and also the **User Profile Synchronization** has been properly configured in SharePoint.

ONTOLICA AGGREGATE

ONTOLICA AGGREGATE INTRODUCTION

Ontolica Aggregate is a virtual library solution for SharePoint that provides functionality to present views of documents from entire SharePoint farm and also from external content sources indexed by SharePoint. By default Ontolica Aggregate Center displays documents from document libraries residing in all Web applications in a farm. But you can configure it to show all content from all Web applications and also from external content sources. Results can also be filtered to show documents from certain Web application(s), site collections or even sites. Furthermore, by using fixed queries you can configure Ontolica Aggregate Center to display documents, for example, only with a certain file extension or by a certain author, etc. Although the Ontolica Aggregate is a part of the Ontolica Search solution, it is a separate product. To be able to use the Ontolica Aggregate you will need a license that supports this product.

ONTOLICA AGGREGATE CENTER

Ontolica Aggregate Center is created like any other SharePoint site. Activating the Ontolica Search feature at the site collection level makes the Ontolica Aggregate Center site template available for that site collection. To create an Ontolica Aggregate Center, please go to the root site of the site collection. Then click **Site Actions** and select **New Site** or **More Options**. On the **Create** window locate the **Ontolica Aggregate Center**. If the template is not available in the list of templates, please make sure that the **Ontolica Search** feature is enabled as described above and an appropriate SharePoint language pack is installed according to the list of languages supported by Ontolica.

Please note that an Ontolica Aggregate Center can be created without having a valid license that supports this product. But you will be able to use the center only after obtaining a valid license that supports the Ontolica Aggregate and setting it as active in the **Central Administration > General Application Settings > Manage Ontolica licenses**.

ONTOLICA AGGREGATE ADMINISTRATION

Ontolica Aggregate farm level configurations are done in **Central Administration > General Application Settings > Manage Ontolica Modules > Manage Aggregate Configuration**. Here you can find configuration pages with default property settings for search result actions and also searchable, search result as well as refiner properties that will be used by all Ontolica Aggregate Centers in your farm. In addition to default properties you can also define custom properties. Site collections and sites in Web applications, where you deployed the Ontolica Search solution, will also have those configuration settings in their Site Settings pages. Lower level configurations inherit settings from higher levels, which means that custom properties defined at the farm level will be available at the site collection and site levels. Those settings can be overwritten in lower levels.

EDITING ONTOLICA AGGREGATE CENTER

In addition to configuring settings in the farm, site collection and site levels you can also configure Ontolica Aggregate Center Web Parts. The core Web Part of an Ontolica Aggregate Center is the **Ontolica Aggregate Results** Web Part, which contains some key settings such as selection of Web applications, content types to be displayed, result templates, language selection, etc. To make changes go to an Ontolica Aggregate Center and click **Site Actions > Edit Page**. Then locate the **Ontolica Aggregate Result** Web Part and click on the **Configure this Ontolica Aggregate Result** Web Part link. That will open the **Aggregate Result Web Part Settings** page. The most important settings of the Web Part are located in the **Fixed Search** section.

ONTOLICA PREVIEW

INTRODUCTION

After the **Ontolica Preview** solution has been installed and deployed, the Ontolica Preview feature will be added to the list of farm features and by default it is activated automatically. The site collections features list will contain three Ontolica Preview features, each of which is in fact a separate product. The **Ontolica Preview for Search** feature adds visual search functionality to Ontolica Search, SharePoint Search, and also to FAST Search for SharePoint. Visual content navigation functionality can be added to Ontolica Aggregate and also to SharePoint document libraries by the **Ontolica Preview for Aggregate** and **Ontolica Preview for Libraries** features, respectively. Please make sure your license supports the products you would like to use.

ONTOLICA PREVIEW BACK-END INSTALLATION

After installing the Ontolica Preview solution you can proceed with the installation of the **Preview Back-end Installer**. Open the **Preview Back-end Installer** folder (installation package) and run the installer. You need to run this installer on all Web front-end machines in your farm. If your farm consists of more than one Web front-end server, select the **Complete** installation option (Gatherer and Conversion services) **only on one of them** and **Typical** installation option (only the Conversion service) on the others. The **Complete** installation option will prompt you for the SharePoint farm account credentials. The provided account must be SharePoint farm account and also local machine administrator account and will be indicated in the installer. In some scenarios it might be necessary to provide the Fully Qualified Domain Name (FQDN) instead of the NetBios domain name in the **Service Doman** filed.

INSTALLING ONTOLICA PREVIEW DATABASE

Ontolica Preview database needs to be installed to store first-page-preview images of documents and Web pages indexed by SharePoint. This database will also be used to temporarily store (cache) preview images from live conversion when the full-document-preview option is selected. If the first-page-preview option is not preferred then the Ontolica Preview database does not need to be installed.

To install the database go to **Central Administration > General Application Settings > Manage Ontolica Modules > Manage Ontolica Preview Database** page. Type the name of your SQL server, user name and password. The account, associated with provided credentials, needs to have the right to create databases on the selected database server instance. Click the **Connect** button and when connected click the **Install** button to create the database.

DEFAULT CONTENT ACCESS ACCOUNT

On this page you will need to provide credentials for the default content access account. This account will be used by the Ontolica Preview on Web front-end servers to create full document preview images. It is recommended for this account to have access to widest range of content in your SharePoint farm.

MANAGING CONTENT SOURCES

Ontolica Preview uses crawl logs of SharePoint Search Service Application(s) as content sources to crawl and create preview images. In the **Manage Content Sources** page you will need to add one or more Search Service Applications as content providers.

When you click the **New Content Source** button on the toolbar the **Add Content Source** page will be opened. You will need to provide a name for the content source in the **Content Source Name** section. Ontolica Preview detects all available Search Service Applications in your farm and provides them in a drop-down list. In the **Select Service Application** section you will need to select a Search Service Application that will be used.

In the **Default Content Access Account** section you will need to provide credentials for an account that has **Open, Read and Execute** rights on the content from the selected Search Service Application. By default Ontolca Preview automatically gets the username of the default content access account for the selected Search Service Application, which can be found in the **Central Administration >**

Application Management > Manage Service Applications > Search Service Application > Default content access account. The username of the account will be displayed in the **Account** textbox. You will need to provide the password for that account if you would like to use that account. You can also use another account. As Web page content and rendering is dependent on the account they are opened by, you can create two different content sources, one for documents and another one for Web pages. Then you can use two separate accounts for content sources. Alternatively this can be achieved by using Preview crawl rules.

On the same page you can furthermore configure Ontolca Preview performance settings, types of content to be crawled and also schedule time when the Ontolca Gatherer service will be crawling the content source. Each of these settings includes short description, along with instructions and also recommended settings. The **Manage Content Source** page contains short summary for each added content source. You can edit settings of a content source by clicking its name and selecting the **Edit** option from the drop-down list. The drop-down list also provides the **Delete** option to remove the content source.

MANAGE CRAWL RULES

Crawl rules can be configured for crawling content placed in locations where the default content access account has no access, e.g. file shares. To define a crawl rule you will need to provide the path to the content and also the username and password for a content access account.

GATHERER SERVICE STATUS

This page shows the list of items being processed and queued when the Gatherer service is crawling documents. In case you encounter the **“Unable to connect to Ontolca Preview Gatherer service”** error when accessing the page, make sure you have completed Preview Back-end installation first. You will see the same error if the **Ontolca Gatherer service** is not running. In that case start the service in Windows Services console. The processing operation can also be temporarily stopped in this page. Please note that restarting the Gatherer service re-crawls content sources.

CRAWL LOG

The **Ontolca Preview Crawl Log** page allows viewing processed items in different categories: **All items, Crawled items and Failed items**. In this page you can search for and check if a certain document has been processed by the Ontolca Preview Gatherer service. This page also provides information on how many total pages each processed item consists of, the number of pages Ontolca Gatherer service created preview images for, type of items processed and the time when an item has been crawled.

ADDING THE ONTOLICA PREVIEW WEB PART TO A SEARCH CENTER

To add visual search functionality to your search center, first of all, please make sure that the **Ontolca Preview for Search** feature is activated in the **Site Actions > Site Settings > Site collection features**. That will make the **Ontolca Preview for Search** Web Part available for that site collection. Then please go to the search result page of your search center, where you want to add the Web Part and select **Site Actions > Edit Page** option. While in the edit mode, click **Add a Web Part** link on any Web part zone. Locate the **Ontolca Preview** folder under the **Categories** column, select the **Ontolca Preview for Search Web Part** under the **Web Parts** column and then click the **Add** button. Note: first-page-preview images of documents will not be available until the Ontolca **Gatherer service** processes documents in question.

ADDING THE ONTOLICA PREVIEW WEB PART TO AN AGGREGATE CENTER

You will need to activate the **Ontolca Preview for Aggregate** feature in the site collection features list to be able to add the Web part to an Ontolca Aggregate Center. Then go to your Ontolca Aggregate Center and select **Site Actions > Edit Page** option. Locate the

Ontolica Preview folder under the **Categories** column, select the **Ontolica Preview for Aggregate Web Part** under the **Web Parts** column and then click the **Add** button. A column with a small magnifier image (default) for each row will be added to the existing list of columns in the Ontolica Aggregate Center. The color of the magnifier icon for a document will be grey until it gets crawled by the Ontolica Preview Gatherer service and its color gets changed to blue after it is crawled. In the Ontolica Preview configuration pages the magnifier image can be replaced by a small thumbnail image of an actual document. Please note that even if the default magnifier icon has been changed to the small thumbnail image you will see the magnifier icon before the document in question gets crawled by the Ontolica Preview Gatherer service. Placing the mouse over the magnifier/thumbnail will display the first-page-preview image of a document/page and clicking that image will show full-document-preview images for that document/page. To close the pane with full document preview images you need to click the magnifier/thumbnail preview image again.

ADDING THE ONTOLICA PREVIEW WEB PART TO A DOCUMENT LIBRARY

To add visual document navigation functionality to a SharePoint document library you will need to create a column of type **Ontolica Preview Column for Libraries**. Activating the **Ontolica Preview for Libraries** feature in the site collection features list makes the **Ontolica Preview Column for Libraries** column type available to all document libraries in that site collection. This column is added to a document library like any other column and the Ontolica Preview Web Part will be added automatically.

To proceed go to the document library to which you would like to add the functionality and select the **Library** link from the top link bar and select the **Library Settings** in the **Settings** of the **Library** ribbon. In the **Document Library Settings** page click on the **Create column** link under the **Columns** heading and that will open the **Create Column** page. Give a name to the column and select the **Ontolica Preview Column for Libraries** option in the **Name and Type** section. If you select the Ontolica Preview column type before giving a name to the column then Ontolica gives the default name for column as Preview. But if you type a name first and then select the column type then the selected name will be preserved. When you select the type for the column you will see a warning/information regarding possible lack of support for this type of column by earlier versions of client programs on the page.

A column with a small magnifier image (default) for each row will be added to the existing list of columns in document library. The color of the magnifier icon for a document will be grey until it gets crawled by the Ontolica Preview Gatherer service and its color gets changed to blue after it is crawled. In the Ontolica Preview configuration pages the magnifier image can be replaced by a small thumbnail image of an actual document. Please note that even if the default magnifier icon has been changed to the small thumbnail image you will still see the magnifier icon before the document in question gets crawled by the Ontolica Preview Gatherer service. Placing the mouse over the magnifier/thumbnail will display the first-page-preview image of a document/page and clicking that image will show full-document-preview images for that document/page. To close the pane with full document preview images you need to click the magnifier/thumbnail preview image again.

Please note that if you are using the **Group By** feature for your document library view then you will not see the Preview magnifier/thumbnail image, although you will see the title of the column. To be able to see the Preview image the value for the Group By setting should be set to **None**.

ENABLING PREVIEW OF WEB PAGES

By default displaying Web page preview images is disabled to maintain confidentiality and restrict access to underprivileged users. This feature can be modified via the Ontolica Preview Front End Configuration pages in the Central Administration for an entire farm, individual Web applications or even separately for each site collection via the **Site Settings** page of site collections. To enable this feature go to the **Ontolica Preview Front End Configuration** page. Click the **First Page Preview** link and select the **Enabled Content** option. Check the **Enable first page preview on web pages** checkbox and click **OK** button to save the changes. To enable preview of Web pages for the full document previews, click the **Full Document Preview** link and select the **Enabled Content** option. Check the **Enable full document preview on web pages** checkbox and click **OK** button to save the changes.

ENABLING FULL DOCUMENT PREVIEW

The full-document-preview functionality of the Ontolica Preview Web Parts is enabled by default. This feature can be modified via the Ontolica Preview Front End Configuration pages in the Central Administration for an entire farm, individual Web applications or even separately for each site collection via the **Site Settings** page of site collections. To make changes for this functionality, go to the **Ontolica Preview Front End Configuration** page. Click the **Full Document Preview** link and select the **Enabled Content** option. A closely related option is to allow users to open multiple preview panes simultaneously, which is very useful feature to visually compare documents side by side. To enable or disable this feature, open the **Preview Pane** option. Note: opening too many preview panes simultaneously will decrease the browser speed.

UPGRADING ONTOLICA

UPGRADING ONTOLICA MODULES

To upgrade Ontolica modules you will need to run the **Setup.exe** program from the main folder of the installation package on one of the Web front-end servers in your SharePoint farm, preferably where the SharePoint Central Administration site is hosted. If the version that is being installed is later than existing one the Ontolica installer automatically detects it and provides the **Upgrade** option, which will be selected by default. Remaining two options are **Keep** and **Remove**. The installer does not make any changes if the **Keep** option is selected to for the selected module and it deletes the current version of the module completely if the **Remove** option is selected.

After upgrading you will need to deactivate and then re-activate the Ontolica features first at the SharePoint farm level **Central Administration > System Settings > Manage farm features** and then at the site collection level **site collection root site > Site Actions > Site Settings > Site collection features**.

The upgrade process automatically sets the free evaluation license, which comes with the installer, as active. You will need to go to **General Application Settings > Manage Ontolica Licenses** and production or development license as active. Please remember that with most upgrades you will need a new license file, which can be requested at support.surfray.com.

UPGRADING ONTOLICA PREVIEW BACK-END

The upgrade process of the Ontolica Preview Back-end involves removing the existing version and installing a later version of the Ontolica Preview **Gatherer** and **Conversion** services. Removing the Ontolica Preview Back-end requires either the previous or later version of the Ontolica Preview module to be installed. To uninstall the Ontolica Preview Back-end you will need to go to **Control Panel > Program and Features**, locate **Ontolica Preview** from the list of installed programs and features, right-click and select the **Uninstall** option. Then you will need to run the Windows installer located in the **Preview Back-end Installer** folder as described in the **Ontolica Preview** section of this guide.