d.velop

d.velop enterprise search:
Administrator

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1. d.velop enterprise search

1.1. Basic information on the application and the manual

This chapter contains general product information and conventions regarding documentation.

1.1.1. About d.velop enterprise search

An ECM system enables structured data storage. As a rule, information objects are not only present in structured in your ECM system, but are also created in other systems and platforms. For example, the correspondence in your Exchange server also contains a lot of information in e-mails that could be relevant for a business transaction. With enterprise search, you can overcome data silos and find information not just in your ECM system, but in your heterogeneous business landscape using providers.

1.2. Installing and Uninstalling

This chapter provides information on installing d.velop enterprise search.

1.2.1. System requirements

Please refer to the central system requirements for d.velop products (on-premises). You can find deviating or more extensive system requirements in the documentation.

1.2.2. Installing d.velop enterprise search

You install the software exclusively using d.velop software manager. If an application is required for different products, the corresponding software packages are also installed automatically.

For further information on installing the software, see the d.velop software manager manual.

1.2.3. Updating an Installation of d.velop enterprise search

You can only update the software using d.velop software manager.

For further information on updates, see the d.velop software manager manual.

1.2.4. Uninstalling d.velop enterprise search

The software you installed using d.velop software manager can only be uninstalled with d.velop software manager. If the software to be uninstalled has dependencies with other software packages, you must resolve these conflicts accordingly.

For further information on uninstallation, see the d.velop software manager manual.

1.3. Configuring d.velop enterprise search

This chapter provides further information on settings and configuration options.

1.3.1. Managing Access Permissions

This chapter describes how you can manage access permissions for administrators and users.

Adding Administrators

When using enterprise search, a distinction is made between administrators and users. Administrators must be members of a group defined for this purpose.

Administrators have the right to manage search providers, for example. The group requires access to a d.3 repository.

This section describes how you can define a group as d.velop enterprise search administrators.

This is how it works

1. Click **Configuration** on the start page.
2. Under **Enterprise search**, choose the entry **Access permissions**.
3. Click **Group of administrators** and select the one group that has access to a d.3 repository.
4. Confirm your selection with **Save**.

You have now set up an administrator group.

Adding Users

When using enterprise search, a distinction is made between administrators and users. Users must be members of their own defined group.

This section describes how you can define a group as d.velop enterprise search users.

This is how it works

1. Click **Configuration** on the start page.
2. Under **Enterprise search**, choose the entry **Access permissions**.
3. Click **Group of users** and choose a group.
4. Confirm your selection with **Save**.

You have now set up a user group.

1.3.2. Managing search providers

This chapter will provide you with information about managing search providers.

System requirements for search providers

Please refer to the central system requirements for d.velop products (on-premises). You can find deviating or more extensive system requirements in the documentation.

Enabling a search provider

To use a search provider that has already been created in enterprise search, you must first enable the search provider.

This is how it works

1. Click **Configuration** on the start page.
2. Under **Enterprise search**, choose the entry **Search provider**.
3. Enable the search provider.
4. As an option, you can choose the menu item **Explicitly authorize a group** in the context menu to make the search provider available only to a specific group.
5. Click **Save** to enable the search provider.

You have successfully enabled your search provider.

Disabling a search provider

You can exclude a search provider for end users in enterprise search. End users can no longer use the search provider after they have been disabled. A saved configuration is retained.

This is how it works

1. Click **Configuration** on the start page.
2. Under **Enterprise search**, choose the entry **Search provider**.
3. Remove the checkmark for the search provider.
4. Click **Save** to disable the search provider.

You have successfully disabled your search provider.

Deleting a search provider

If you no longer need a configured search provider, you can remove the search provider from the enterprise search configuration. End users can no longer use search providers after they have been deleted. This operation will cause a saved configuration to be lost.

This is how it works

1. Click **Configuration** on the start page.
2. Under **Enterprise search**, choose the entry **Search provider**.
3. Click the context menu of the search provider.
4. Click **Delete** to remove the search provider.

You have successfully removed your search provider.

1.3.3. Configuring custom search providers (OpenSearch)

In this chapter, you will learn more about configuring custom search providers using OpenSearch.

Adjusting a custom search provider

You can customize search providers that have already been created if, for example, you want to change the search query for connected systems.

This is how it works

1. Click **Configuration** on the start page.
2. Under **Enterprise search**, choose the entry **Search provider**.
3. Click the cog icon for the **Custom search provider** group and click **Managing custom search providers**.
4. Choose the desired search provider, click the pen icon and customize the entries according to your new requirements.
5. Click **Save** to adopt your customization.

> **Note**
>
> You can find a precise description of the structure of the OSDX on the following website: OpenSearch description
>
> An example is provided at the end of the article. Please see the instructions for the corresponding system to determine how to access the OpenSearch description.

You have successfully customized the search provider. Update the search provider in search provider management.

Google OSDX

```xml
<?xml version="1.0" encoding="utf-8"?>
<OpenSearchDescription xmlns="http://a9.com/-/spec/opensearch/1.1/">
  <ShortName>Live system (D)</ShortName>
  <Description>Live system(D)</Description>
  <Url type="application/rss+xml" template="https://(mycompany).d-velop.de/dms/r/(myrepsoitoryid)/sr?
fulltext={searchTerms}&amp;page={startPage}&amp;pagesize={count}&amp;format=opensearch" />
</OpenSearchDescription>
```

Deleting a custom search provider

You can remove custom search providers that you no longer need from the configuration.

This is how it works

1. Click **Configuration** on the start page.
2. Under **Enterprise search**, choose the entry **Search provider**.
3. Click the three-dot menu and the trash can icon in the line of the required search provider.
4. Click **Delete**.

You have successfully deleted the search provider.

Creating a custom search provider

You have the option to connect systems that have an OpenSearch interface. This section describes how to connect a user-defined system.

This is how it works

1. Click **Configuration** on the start page.
2. Under **Enterprise search**, choose the entry **Search provider**.
3. Click the cog icon for the **Custom search provider** group and then click **Custom search provider**.
4. Click the plus sign to add a custom search provider.
5. Specify the desired name.
6. Specify the URL for the desired icon. It must be possible to access the URL from a browser. You have the option to make static content available in d.velop enterprise search and to use it here.
7. Enable **Open search results in a new window**, if a view is not possible within an iFrame.
8. Under **OpenSearch Description (.osdx)**, specify the OpenSearch description for the system.

> **Note**
>
> You can find a precise description of the structure of the OSDX on the following website: OpenSearch description
>
> An example is provided at the end of the article. Please see the instructions for the corresponding system to determine how to access the description.

9. Click **Add** to save the search provider.

You have successfully created your search provider. Update and activate the search provider in search provider management.

OSDX

```xml
<?xml version="1.0" encoding="utf-8"?>
<OpenSearchDescription xmlns="http://a9.com/-/spec/opensearch/1.1/">
  <ShortName>Live system (D)</ShortName>
  <Description>Live system (D)</Description>
  <Url type="application/rss+xml" template="https://(mycompany).d-
velop.de/dms/r/(myrepsoitoryid)/sr?
fulltext={searchTerms}&amp;page={startPage}&amp;pagesize={count}&amp;format=
opensearch" />
</OpenSearchDescription>
```

1.3.4. Deploying Static Content

You can deploy static content and access it via the enterprise search in a web-based format. For example, you can deploy your own image files or logos to customize the appearance according to your own needs.

This is how it works

1. Open the installation directory of d.velop enterprise search. The path is usually:

   ```
   C:\d3\d.velop enterprise search
   ```
2. Create a **files** subfolder. The path is usually as follows:

   ```
   C:\d3\d.velop enterprise search\files
   ```
3. Store the desired files in the **files** subfolder.

You have now stored your files and made them accessible in a web-based format via d.velop enterprise search. The files can be called in the browser with the following path:

```
https://<Base address>/enterprisesearch/static/*
```

When you deploy a file **Logo.png** in the folder**C:\d3\d.velop enterprise search\files** , the logo can be accessed in the browser with the following call:

```
https://<Base address>/enterprisesearch/static/Logo.png
```

1.3.5. Customizing the Appearance

You can customize the appearance of the enterprise search.

You can customize the following logos and icons to match your corporate design:

- The logo of the start page.
- The logo of the mobile start page. This logo has a more compact design.
- The logo of the result list.
- The icon that is displayed if no results were found for your search (this is called the "empty-state image").

This is how it works

1. Click **Configuration** on the start page.
2. Under **Enterprise search**, choose the entry **Appearance**.
3. Click the pen icon for the logo or image that you want to customize.
4. You have two options for integrating an image.
   a. Enter the URL for the file.
   b. Upload the file.

Entering the URL

1. Choose **Specify URL**.
2. Enter the URL for the image. If the URL is correct and accessible, a preview of the image is displayed.
3. Click **Save**.

Uploading the file

1. Choose **Upload file**.
2. Click the image plus icon and choose a file. After the upload, the image is available for selection.
3. Choose the desired image and click **Save**.

You have customized the logo. Click the reset icon at any time to return to the default image.

1.3.6. Managing available extensions

You have the option of viewing the available extensions. Extensions are modules such as context menus that are added by installing additional search providers.

This is how it works

1. Click **Configuration** on the start page.
2. Under **Enterprise search**, choose the entry **Extensions**.
3. You can now view all the available and registered extensions.
4. If you have installed additional search providers, click the refresh icon to read and register the included extensions. The registration is carried out automatically.

In certain constellations, extensions are not registered automatically after a provider is installed. In such cases, the registration is carried out by pressing the refresh icon once. For example, d.velop connect for Microsoft SharePoint implicitly includes context actions for d.velop enterprise search that can be registered through this process.

1.3.7. Implementing the enterprise search in other applications

You can integrate the enterprise search as an iFrame in other applications, e.g. in your intranet as a central entry point to your organizational knowledge.

All you need for the implementation is the following URL:

<d.velop cloud tenant>.d-velop.cloud/enterprisesearch/search/

You can influence the behavior of the implementation with parameters.

Parameter	Description	Example
q	With the parameter **q** you can pass a search term that is immediately searched for in the enterprise search when opened. You must pass the search term URL-encoded.	/enterprisesearch/search?q=Example
p	With the parameter **p** you can limit the search provider to be used for the search. You can view the ID of the search provider in the search provider management.	/enterprisesearch/search?p=<search provider ID>
minimal-View	With the parameter **minimalView** you can specify that the search display should be lightweight and minimalistic. No logo is displayed.	/enterprisesearch/search?minimalView
hideProviderSelection	With the parameter **hideProviderSelection** you can specify whether the search provider selection should be displayed. These are the possible values: • **start**: The search provider selection on the start page is hidden. • **all**: The search provider selection on the start page and on the result list page is hidden.	/enterprisesearch/search?hideProviderSelection=start
newTab	With the parameter **newTab** you can specify that after a search the result list opens in a new tab.	/enterprisesearch/search?newTab
provider-View	With the parameter **providerView** you can define how the search provider selection is displayed on the result list page. These are the possible values: • **dropdown** (default value) • **smallcards** • *bigcards*	/enterprisesearch/search?providerView=bigcards

Example URL: /enterprisesearch/search?q=Example&p=598238e4ed7df5505cdc9304e3371b88-7f0b4762571d05f45f62e4d43b8f6f05&hideProviderSelection&newTab&minimalView

Possible uses of the parameter p - This is how it works

With the parameter **p** you can limit the search provider to be used for the search. How to determine the concrete ID in the configuration interface of the enterprise search:

1. Go to **Managing search providers**.
2. Click the context menu of the search provider.
3. Copy the ID.

You can pass multiple search providers with a hyphen as separator, for example: /enterprisesearch/search?q={search term}&p={providerID1-providerID2}

If you pass the parameter **p** without values (p=""), all search providers are searched.

If you do not specify the **p** parameter, the enterprise search will search with the user's last custom search provider selection.

Configuring d.ecs http gateway

By default, d.ecs http gateway is configured in such a way that it prevents IFRAME from embedding sites from registered apps into other websites. The two headers **Content-Security-Policy** and **X-Frame-Options** prevent embedding. If, however, you want to integrate another application is d.ecs http gateway, you need to adjust the values in the two headers.

Let's assume that you want to integrate d.ecs http gateway into an application run from https://server01.d-velop.de. In this case you state the URL in the header:

1. Add **https://server01.d-velop.de** to the value **frame-ancestors 'self'** in the header **Content-Security-Policy**.
2. Add **https://server01.d-velop.de** to the value **ALLOW-FROM** in the header **X-Frame-Options**.

You can, if needed, adjust the HTTP headers **Content-Security-Policy** and **X-Frame-Options** or add a new header. The header is automatically defined by d.ecs http gateway for each forwarded response.

If you make changes, you will need to restart d.ecs http gateway.

This is how it works

1. Open the d.ecs http gateway configuration screen and select **Configuration**.
2. Use **Add header** to add a header line or delete the header.
3. Confirm this action by clicking **Yes, save and restart**.

1.4. Additional information sources and imprint

If you want to deepen your knowledge of d.velop software, visit the d.velop academy digital learning platform at https://dvelopacademy.keelearning.de/.

Our E-learning modules let you develop a more in-depth knowledge and specialist expertise at your own speed. A huge number of E-learning modules are free for you to access without registering beforehand.

Visit our Knowledge Base on the d.velop service portal. In the Knowledge Base, you can find all our latest solutions, answers to frequently asked questions and how-to topics for specific tasks. You can find the Knowledge Base at the following address: https://kb.d-velop.de/

Find the central imprint at https://www.d-velop.com/imprint.