swoosh

M365 Administration Install
User Guide For Swoosh.cloud

Contents

Getting to know Swoosh DocConnect

As you know by now, Swoosh as a platform has a number of different applications that you can deploy into Microsoft 365 environments allowing quick productivity gains. On the Swoosh platform, there are a number of applications that connect to the Microsoft 365 platform including Microsoft Teams, Microsoft SharePoint, Microsoft Dynamics, etc.

As a GOLD application on the Swoosh platform, DocConnect is categorised as highly configurable.

Today we're looking at getting you up and running with Swoosh DocConnect. This document aims to help you install DocConnect, show you where to find the settings you can configure around DocConnect and also a FAQ on how to get support if you need it.
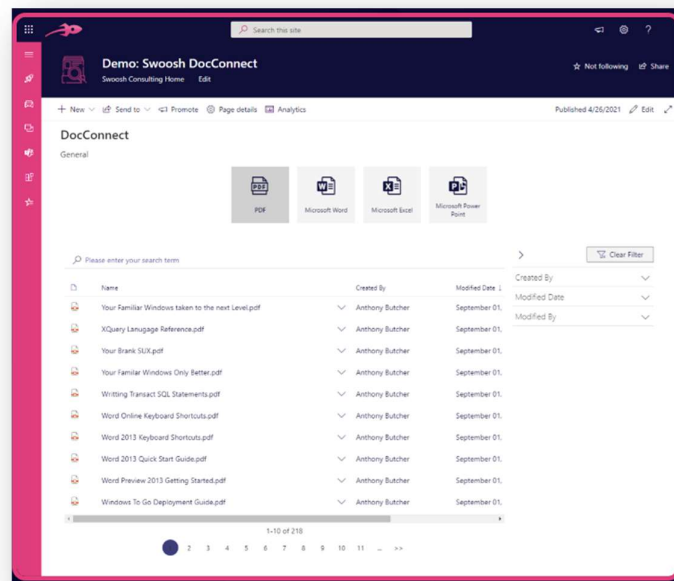
As one of the native Swoosh applications, DocConnect is supported directly by the Swoosh team, if you need a hand reach out and we can get you sorted.

Microsoft SharePoint Support

Swoosh DocConnect has been created as a Microsoft SharePoint-based application. The current version relies upon the core Microsoft search engine built into Microsoft 365 to operate. The following is a list of currently supported versions of Microsoft SharePoint for DocConnect.

Supported: Microsoft SharePoint Online

Unsupported: Microsoft SharePoint 2019, Microsoft SharePoint 2016, Microsoft SharePoint 2013

We note that the DocConnect package can be deployed into various versions of Microsoft SharePoint noted as unsupported, however Swoosh as the software provider cannot guarantee operation or functionality.

Installing Swoosh DocConnect

The first step we need to do to get you up and running is to download and install Swoosh DocConnect into your Microsoft 365 tenant.

We're going to assume up front the following:

- You're organisation is already a Swoosh Partner or supported end-user
- An authorised user or your nominated partner has already approved the purchase of Swoosh DocConnect within Swoosh Mission Control
- You have the correct permissions in your Microsoft 365 tenant to install, deploy and activate applications for your organisation

If your response to all of the above is yes, then lets get started.

1. Log into Swoosh Mission Control at www.swoosh.cloud and locate the Swoosh DocConnect application within the application marketplace.
2. Click the 'Download App' button to take you to the download page
3. Swoosh will provide you with all the various versions of DocConnect available. Select the latest version from the list and click the 'Download' link on the right-hand side of the page.
   Note: at some points, you may require an earlier version of the application, if instructed or required, select the correct version of the application and click download.
4. Clicking the link will download 'doc-connect.sppkg' to your default download location. This is most likely the 'downloads' folder in your windows explorer window.

Deploy Swoosh DocConnet into your Microsoft 365 tenant

5. Next, open your tenants Application Catalogue at: **https://{tenant name}.sharepoint.com /sites/appcatlog/_layouts/15/tenantAppCatalog.aspx/manageApps**
   Note: your application may have a different name if it does substitute the word 'appcatlog' for your application catalogue name.
6. Click the 'Upload' button and navigate to the download folder where you saved the DocConnect package from Mission Control
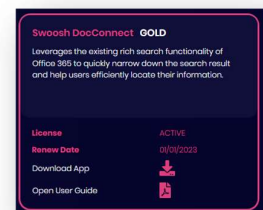
7. Once the package is finished uploading, Microsoft 365 will ask you about the permissions for the application within your tenant. Swoosh recommends that you enable DocConnect for the entire tenant, this way DocConnect can be added and configured for any site.

   Note: This screen is shown (right) in the 365 Modern interfaces. It may look different if your tenant is still using the 365 classic interfaces.

   Congratulations, you now have Swoosh DocConnect installed and ready to configure.
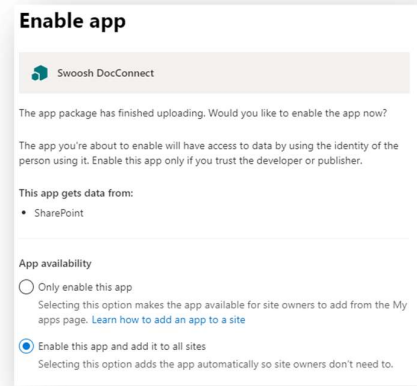
Activating and configuring Swoosh DocConnect

8. Next we activate the licensing for DocConnect, to do this go to the Swoosh 365 Command module page at /sites/swooshadmin, there you will find the DocConnect configuration page with only the 'About' function enabled.

9. Click the 'Visit Product Page' which will directly open a page to activate the DocConnect license.

10. On the license activation page, click the 'Active' button
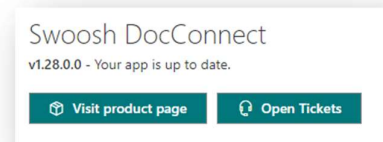
Configuring Swoosh DocConnect

With DocConnet now deployed and activated into your target Microsoft 365 tenant, it's now time to understand the configuration options available to you.

As a GOLD Swoosh application, DocConnect is a highly configurable app that can give you any number of numerous options to make search results shine.

Swoosh DocConnect can be deployed multiple times into your environment, with each time the DocConnect web part being deployed giving your tenant a different configuration so that your search results are tailored to your needs.

With the number of options available, it's recommended that the behind-the-scenes configuration be handled by an IT Administrator within your environment. For example, this could be Swoosh IT Partner or your Internal IT Manager.

So let's take a look at configuring Swoosh DocConnect including:

- Display Configuration
- Search Results
- Refiners
- Column Management
- Display Types
- Web Part Configuration

Swoosh 365 Command Module Configuration

The Swoosh 365 Command Module (or Swoosh Admin in older tenants) allows for the configuration of any Swoosh-managed application depending on the options provided by the developer. For DocConnect the following options are configured globally:

Default Settings

Due to the complexity of what can be configured with DocConnect. there are multiple variables to be taken into account. You can view these settings by:

1. Opening up the 365 Command Module
2. Clicking Settings (it will be at the bottom of your list of applications)
3. Scroll through the application settings until you find the app "Name": "Swoosh DocConnect"

If your settings for DocConnect are blank then ensure that your tenant has purchased the application and click the 'Ensure Lists' button on the Settings page and the correct settings and license details will be downloaded from Swoosh Mission Control.

WARNING: Modifying settings on this page can cause unexpected results, note that the JSON includes settings for all Swoosh-managed applications, not just DocConnect.

If you encounter an issue, you can clear JSON settings and click 'Ensure Lists' to reload all default settings for all applications.

Should you modify a setting from its default then just click 'Save' at the bottom of the page to have the change take effect.

About Tab

The About tab provides the core information about DocConnect including

- Version of the app deployed
- The license information (including expiry date)
- Any information that the developer needs to update you on
- A "Visit Product Page' allowing you to view/manage details of the DocConnect license
- A "Open Tickets" button, allowing

Items to Include Tab

The items to include tab allows for the configuration of how search functions with will within the Swoosh DocConnect web parts when they are deployed on the various pages of a Microsoft 365 tenant.

Results Source

Select the Microsoft Search Result source that you wish to apply a filter against, this includes Microsoft SharePoint and Microsoft Teams functions. As Microsoft release more source filters they will be added to this list. Current sources are shown (Right)
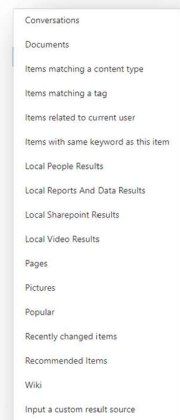
Property Filter

Enter your Keyword Query Language (KQL) syntax to apply the filter across the related search.

Link KQL Syntax Reference (Microsoft): https://docs.microsoft.com/en-us/sharepoint/dev/general-development/keyword-query-language-kql-syntax-reference

General Settings Tab

The general settings tab allows for the management setting of global behaviours of DocConnect including:

Drag & Drop Feature

When enabled the drag & drop feature of DocConnect will allow a user to manipulate external files through the DocConnect search interface. By default, this function is turned off. When enabled (Left) files can be uploaded into 'approved locations only (Right).
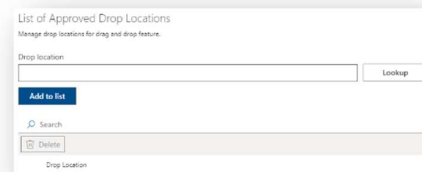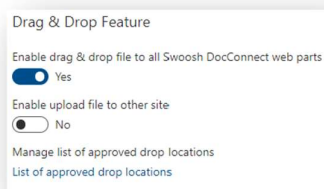
Should cross-site uploading be required then 'Enable upload file to other site' must be enabled.

<u>Web Part Security</u>

The web part security settings, enable or disable functions in the DocConnect web parts for users, (including admins). The options include:

- Prevent users to update Advanced Configuration through all Swoosh DocConnect web parts
  Default Setting: No
- Prevent users to reset web part configurations through all Swoosh DocConnect web parts
  Default Setting: No
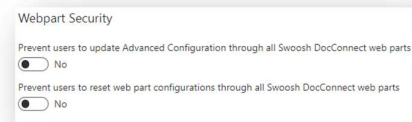
These default settings mean that users that can deploy and configure web parts will have access to configure DocConnect settings within a deployed Web Part.

Search Results Tab

The Search Results tab, allows for the setting of how search results are displayed through DocConnect, the field values include:

Field	Value
Title	A unique title for the current *Search Result* configuration
Rows per page	Determine the total items (rows) to be displayed on each page
Initial Sorting	Default sorting when page first loads or in the initial state
Search Sorting	Sorting that will be applied when keywords or refiners are used
Trim Duplicates	Remove duplicated items and only show unique ones
Enable Partial Search	Allow partial search which allows users to provide only part of the word instead full word to search using keyword
Limit Search to Current Site	Limit scope of the search only to the current site (a site where **Swoosh DocConnect** web part is used
Allow User to Personalize View	Users can show/hide and reorder columns in the **Swoosh DocConnect** web part and it's saved in the browser as his/her own personalized view

Refiners Tab

The refiner's tab within Swoosh DocConnect allows the user to add/remove search refiners that can be used within the deployed web part in any area of a SharePoint site.

In general terms, refiners work as filters for specific search results and are presented as input controls or options within a drop-down.

The following are example configurations of refiners
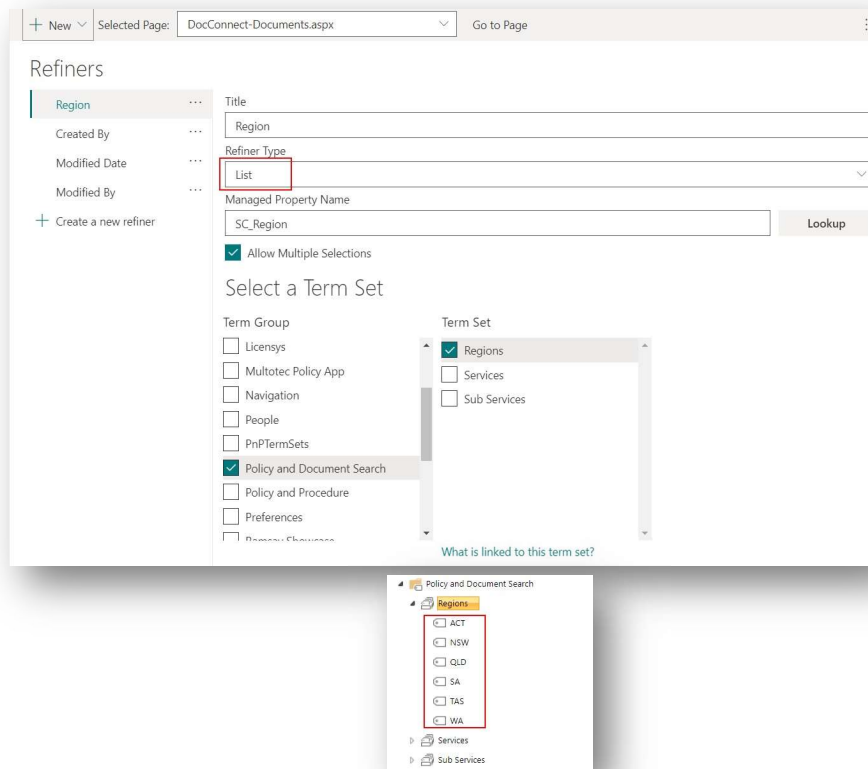
This type of refiner will display a list of terms under the selected term set and presents them in a list box.
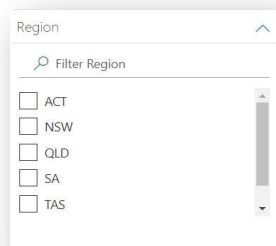
The search results will be refined based on Managed Property Name provided in the configuration and the selected item in the refiner.

Refiner type: List of List/Libraries
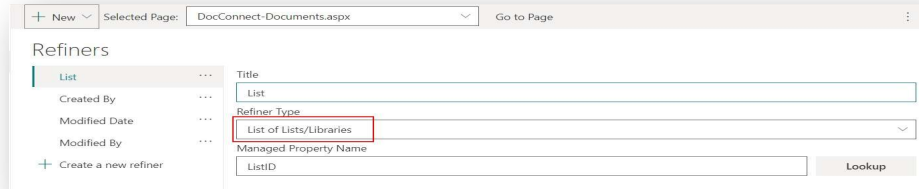

This type of refiner will display lists/libraries as refiner options. Usually, this refiner type will use **ListID** as **Managed Property Name**.
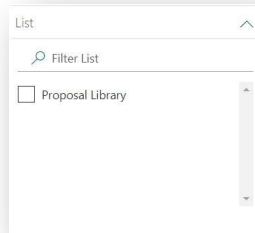
Refiner type: List of Site Collections
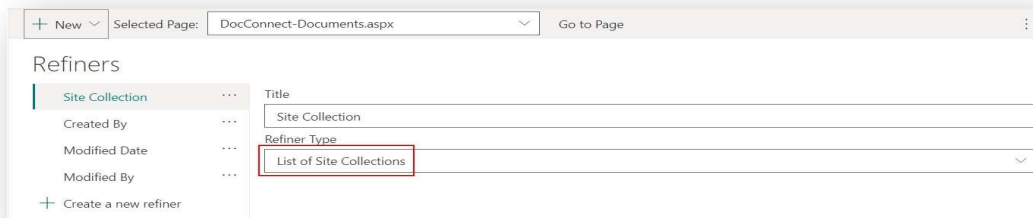
This type of refiner will display list of site collections as refiner options.
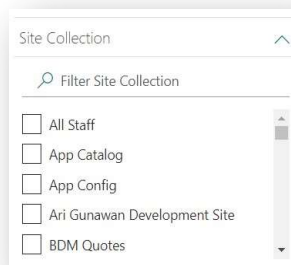
There is no need to specify **Managed Property Name** for this type since it internally uses its own managed property.

Refiner type: List of Sites
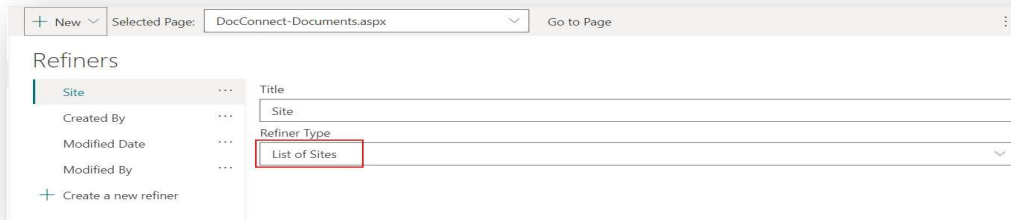
This type of refiner will display a list of sites as refiner options.
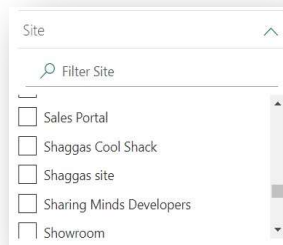
There is no need to specify **Managed Property Name** for this type since it internally uses its own managed property.

Refiner type: List of Refiner Queries
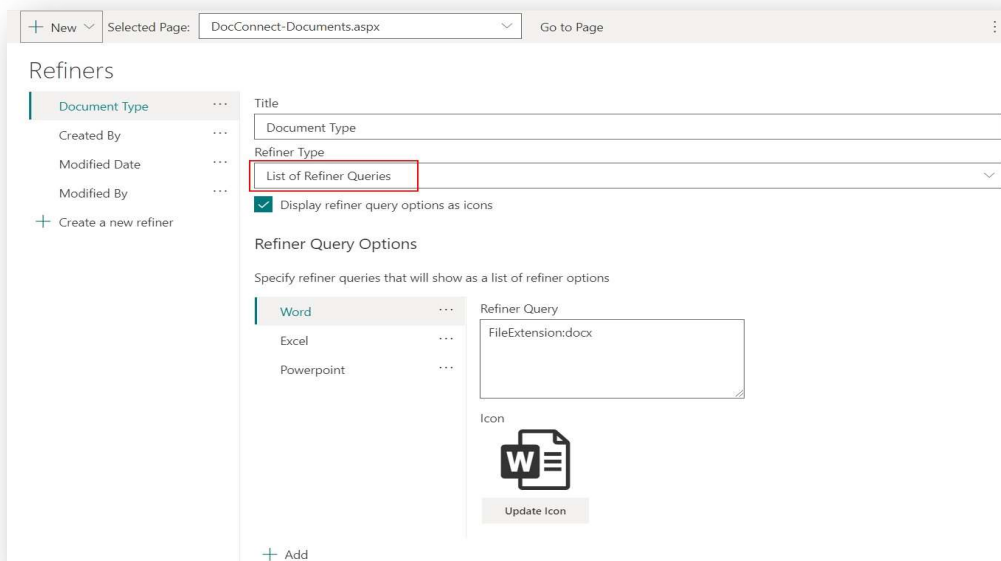
This type of refiner will display user-defined queries as refiner options. It allows you to have a dynamic filter because it lets you define your own refiner query. There is a checkbox to display refiner queries as icons, if it's checked then refiner queries will be displayed as icons placed above the search result:
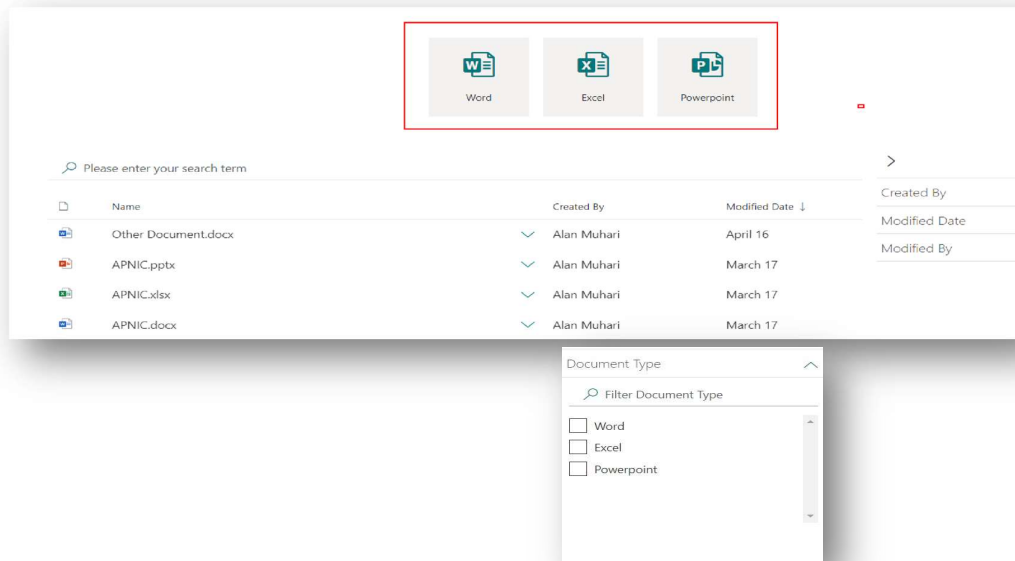
And if the display refiner query checkbox is not checked, it will display the refiner as a common refiner but still have the same functionality.

Refiner type: List of Library Root Folders
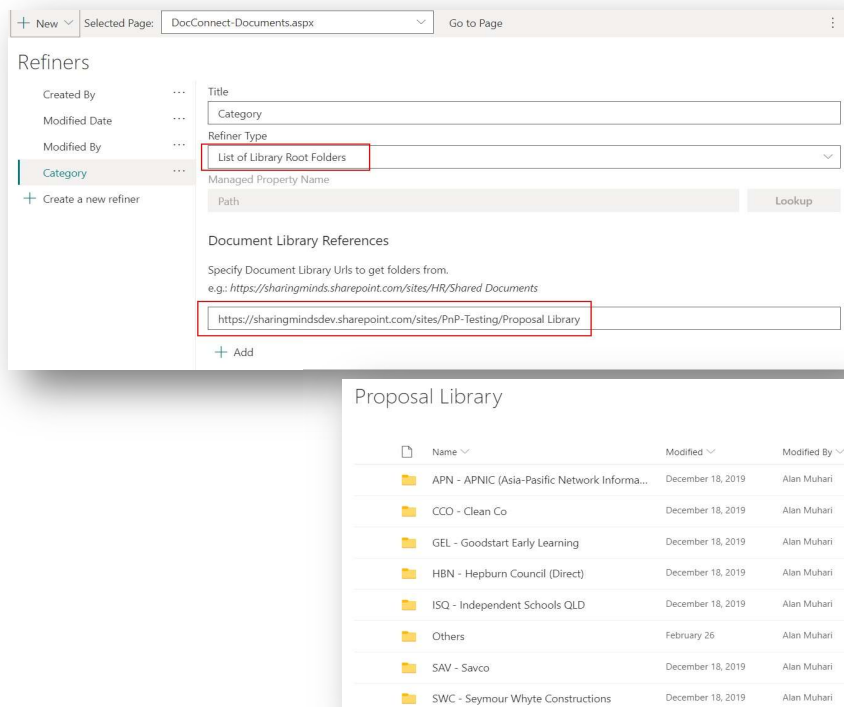
This type of refiner will display a list of root folders from libraries provided in the configuration.
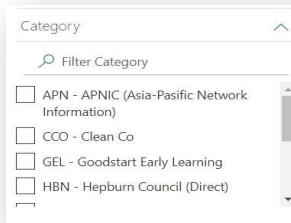
Clicking on an option (folder) will display sub-option (subfolders) and refine the search result based on **the** selected option.
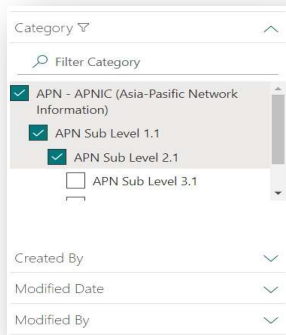
Refiner type: **Search Box**
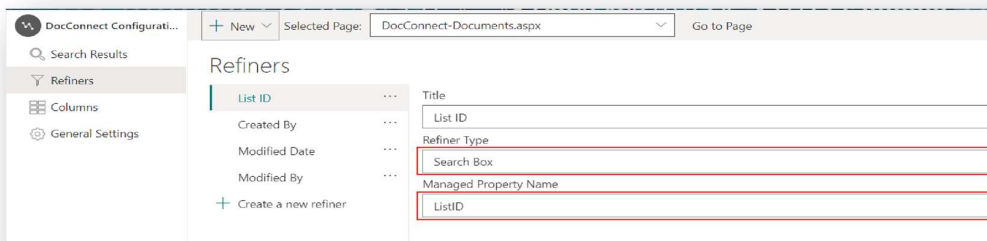
This type of refiner will provide a search box to refine search results based on provided Managed Property Name. In this example, the refiner will refine the search result based on **List ID**.
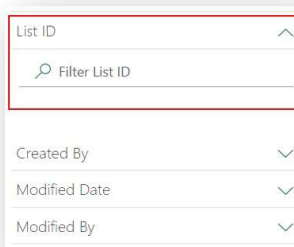
Refiner type: **Combo Box**
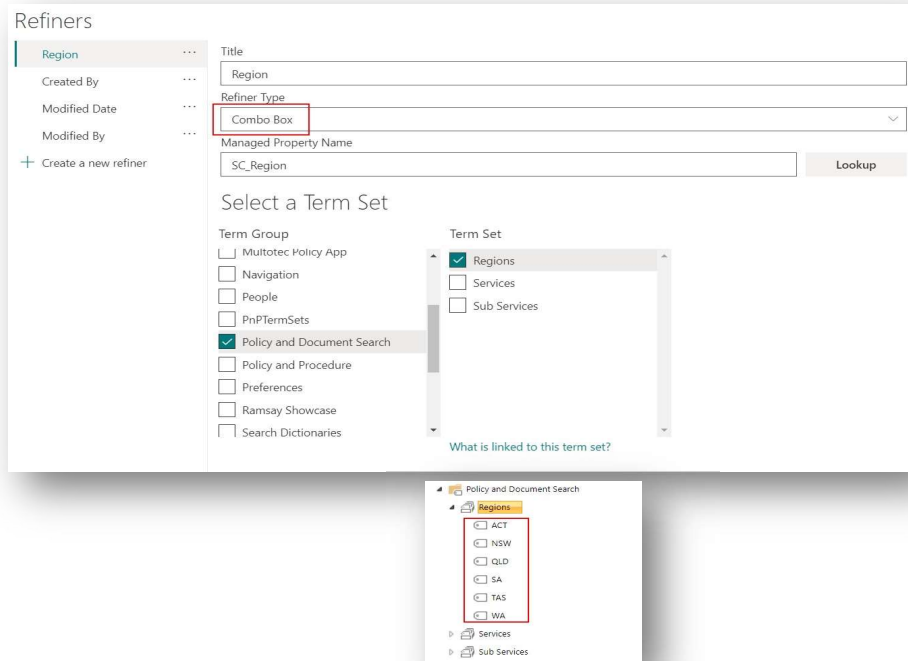
This type of refiner will display the list of terms under the selected term set and presents them in a combo box.
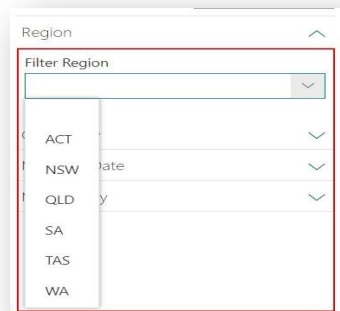
The search result will be refined based on Managed Property Name provided in the configuration and the selected item in the refiner.

Refiner type: Date
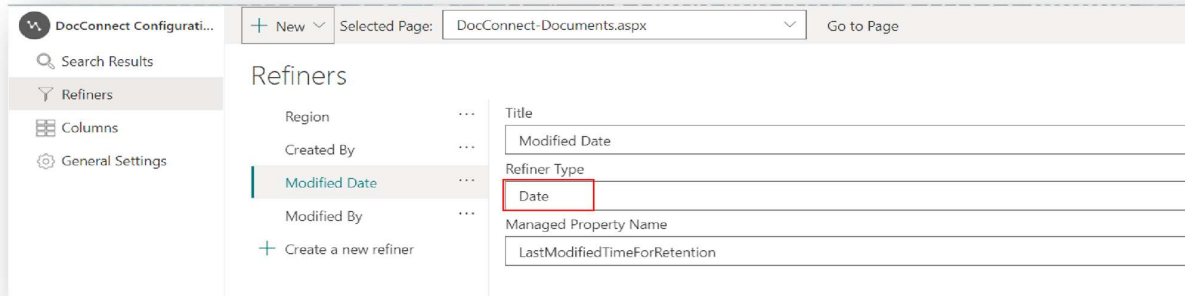
This type of refiner will provide a ranged date picker to refine search results based on provided **Managed Property Name** and the selected date.
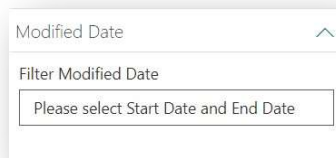
In this example, it will refine search results based on **LastModifiedTimeForRetention** with selected **Start Date** and **End Date**.
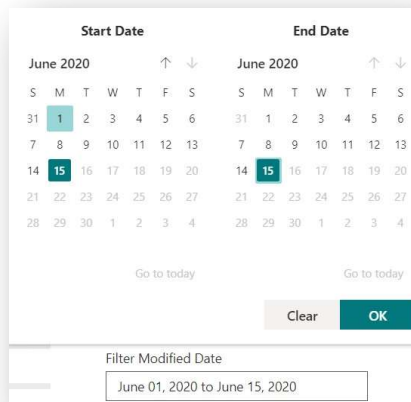
Refiner type: **People**
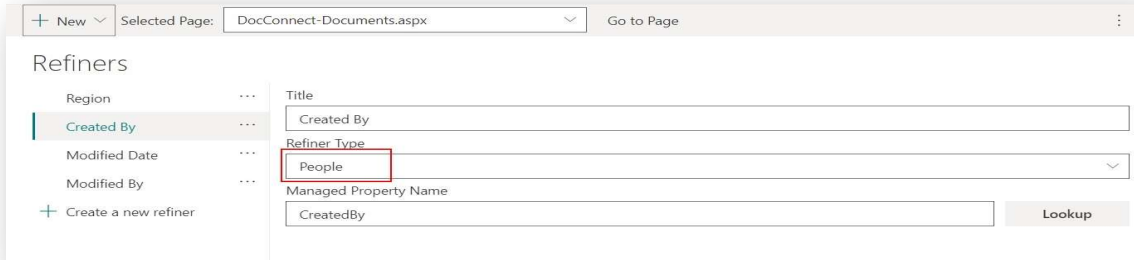
This type of refiner will provide a people picker to refine search results based on provided **Managed Property Name** and selected people. In this example, it will refine search results based on **CreatedBy** with value **Alan Muhari**.

It also supports multiple people selection.

Refiner type: SharePoint Refiner
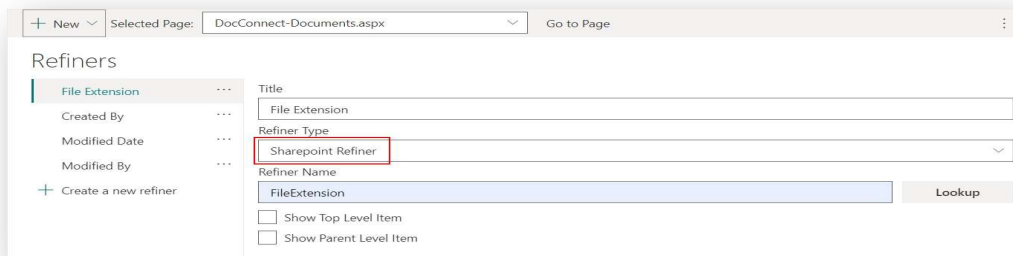
This type of refiner will display a list of options based on the selected **Refiner Name.** In this example, it will create a list of file extensions as a refiner. It also supports multiple people selection.
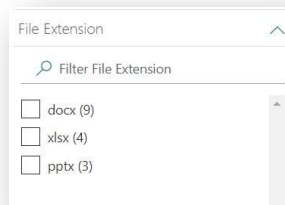
Columns Tab

This section will explain how to add/remove **Columns** to use in **Swoosh DocConnect** web part, each type of column will also be explained in detail. Columns work to display information about an item in a certain format.

Columns configuration:
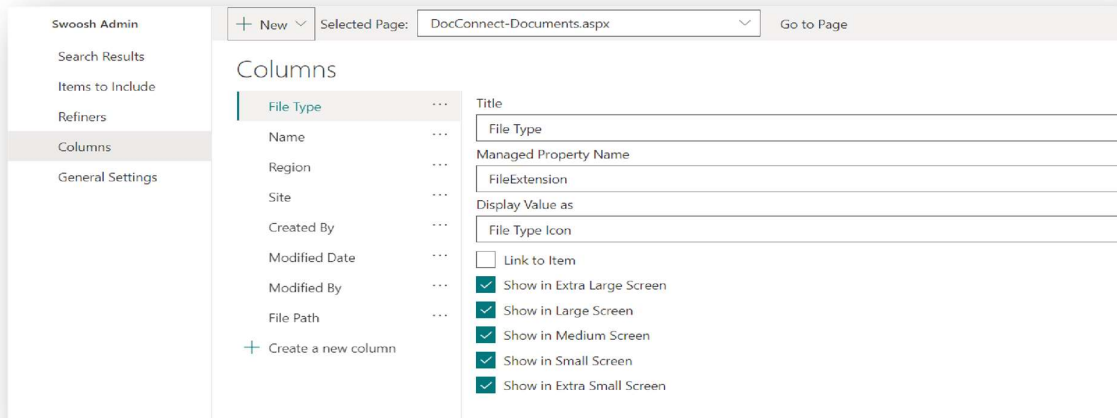
When viewed through Swoosh DocConnect columns look similar to the following screen:
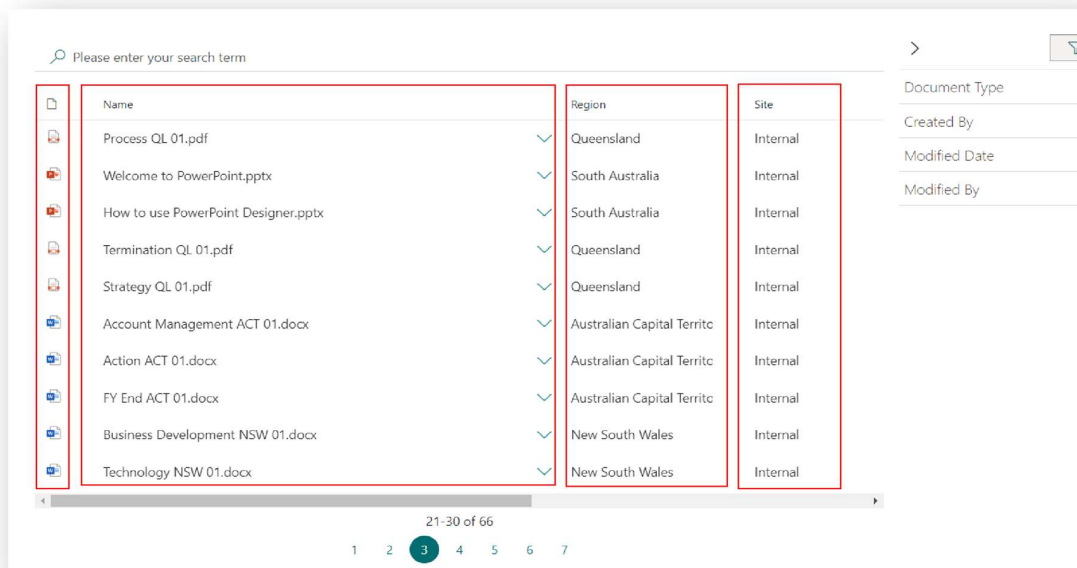
ADD OR REMOVE COLUMNS

Open Columns Configuration Page

There are two ways to open this page. First is through **Swoosh DocConnect** web part:

- Open web part properties

- Click on **Advanced Configuration**
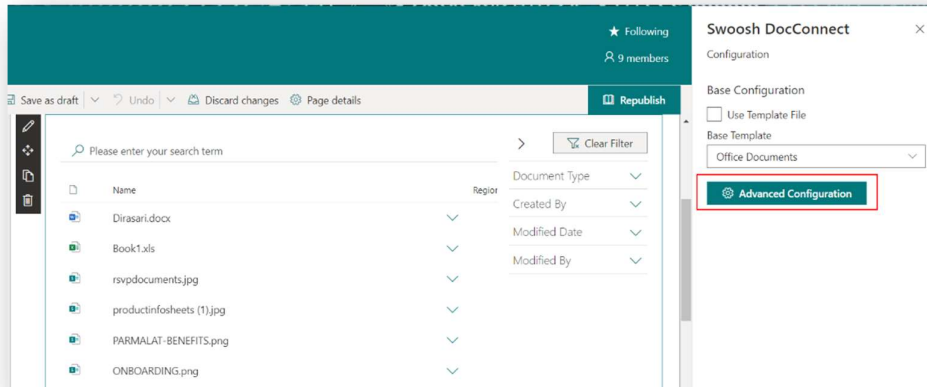
- Click on Columns
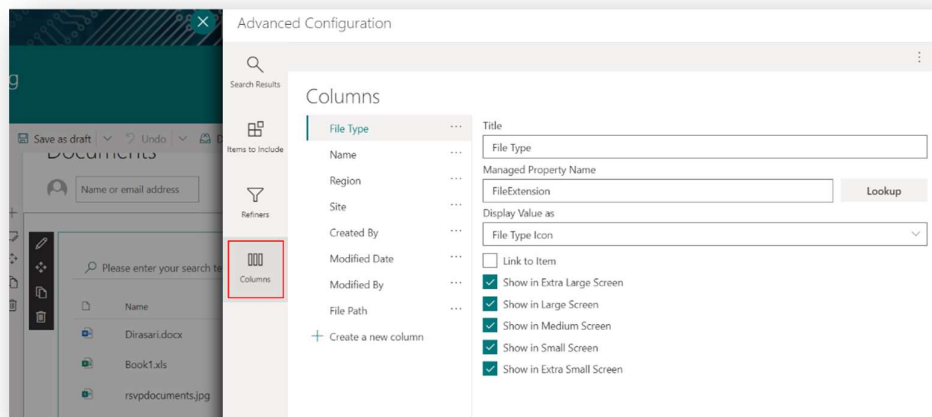
The second one is through the **Swoosh Admin** app:

- Open the Swoosh Admin app

- Click Columns under DocConnect on the left-hand side menu
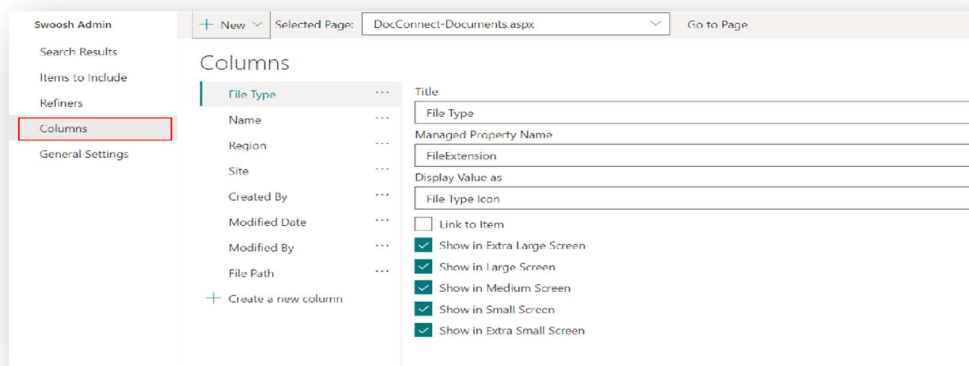
Add Column

- Open Columns configuration page

- Select site where the page is located
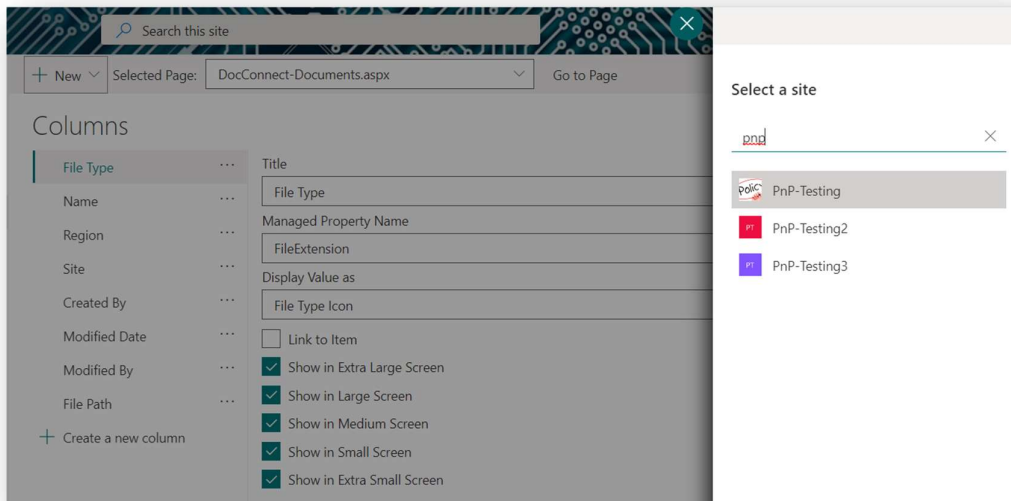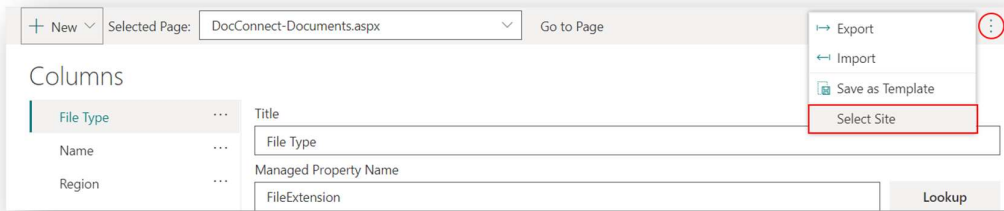
- Select the page which has Swoosh DocConnect web part that will be updated
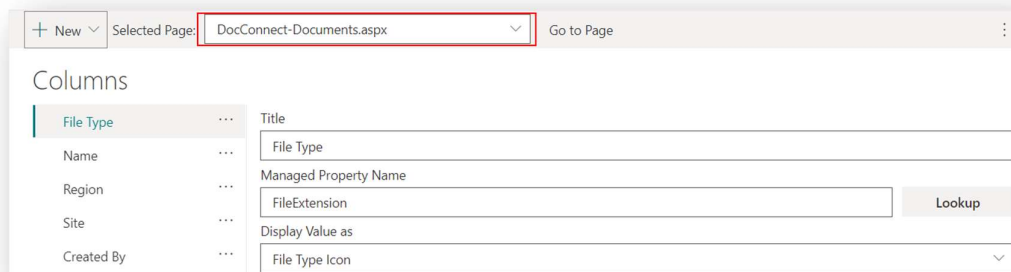
- Click on **Create new column**
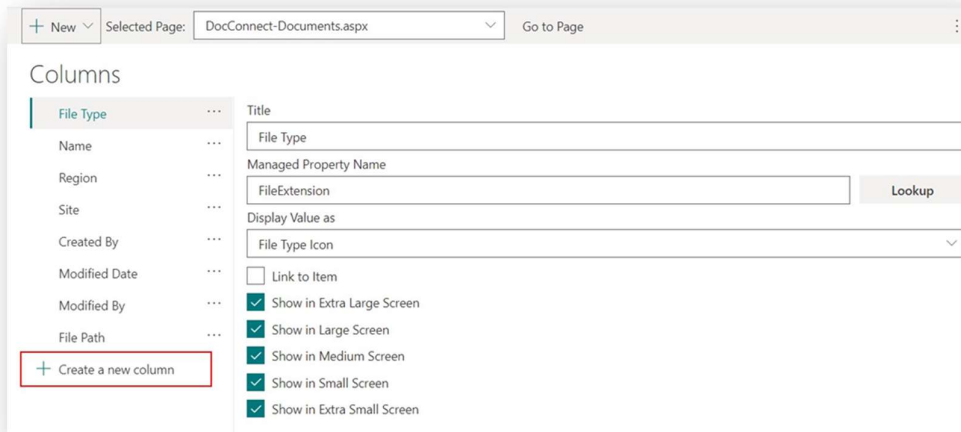
- Input column information such as Title, Display Value as (Display Type), Managed Property Name and other necessary fields. These inputs will vary based on the selected display type.

Remove Column

- Removing columns can be done using the **Delete** option available on the three dots menu.
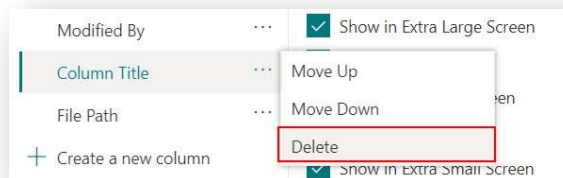
- Save to update the changes.

Display Types

Display Type: File Type Icon

This type of column will display value as an icon based on the file extension. The header uses an icon as well for this display type.

Display Type: Plain Text

This type of column will display value as plain text (without any formatting).

Display Type: Clean Managed Metadata

This type of column will extract managed metadata labels from raw taxonomy values, removing GUID and another part.

Display Type: Formatted Date

This type of column will display the date value as a relative time format for dates that are within a month. E.g.: **36 minutes ago**, **a week ago**, **two weeks ago**, etc. As for dates more than a month and still within the current year then it will be displayed in **MMMM DD** format (e.g.: **April 16**). For the longer dates, it will be displayed in **"MMMM DD, YYYY"** format (e.g. **December 18, 2019**).

Display Type: Formatted Date Time

This type of ask MMMM DD, YYYY

Display Type: Link

This type of column will generate a link based on the value from provided **Managed Property Name**.

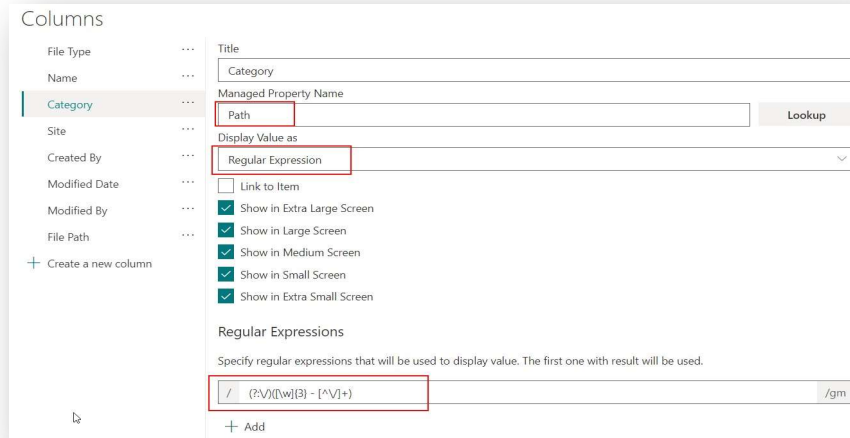## Display Type: List/Library Name

This type of column will display the list/library name related to the item. It will use **List Id** to get list information. So, make sure to provide **Managed Property Name** that will return **List ID** (GUID).

Display Type: Regular Expression

This type of column will result in regular expression based on input from provided managed property. In this example, it's grabbing a certain string from **Path**.
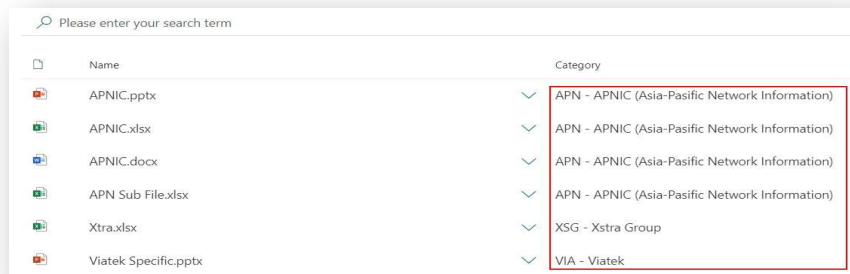
Note: *It supports multiple regular expressions. The first regular expression with the result will be displayed.*

There is also a feature to test regular expressions before saving the column (move the cursor over the regular expression textbox to see the option):
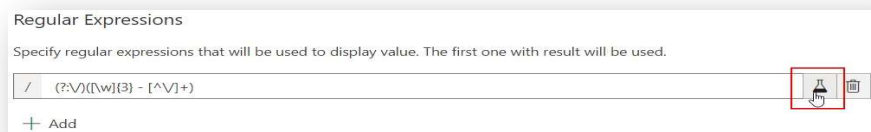
Test window:
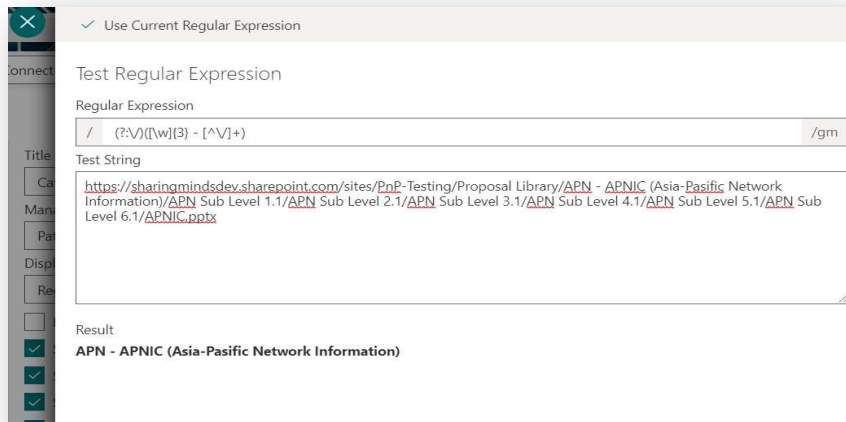
Display Type: Site Collection
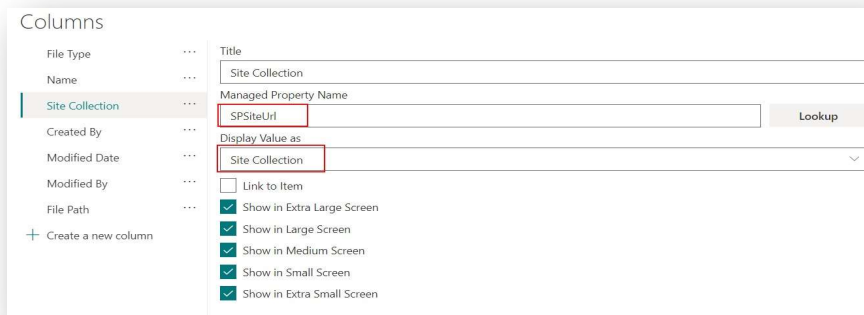
This type of column will display the site collection name related to the item. It will use a URL to get the site collection name. So, make sure to provide **Managed Property Name** that will return a site collection URL.

Display Type: **Site**

This type of column will display the site name related to the item. It will use a URL to get the site name. So, make sure to provide **Managed Property Name** that will return a site URL.

Adding DocConnect to Microsoft Teams

One of the key features of Swoosh DocConnect is that you can also use it within Microsoft Teams; this also means that by using DocConnect, you can bring your SharePoint Intranet into the Teams environment without having to open new windows or refresh browsers.

Once activated, the same options of filters, refiners & search options within SharePoint will also be available as an app within Microsoft Teams.

To enable DocConnect within your Microsoft Teams environment:

1. Within the AppCatalog where you deployed DocConnect, select the DocConnect application and click the 'Add to Teams' button.

Once the application has been successfully added to Teams, go into Microsoft Teams (teams.microsoft.com) and add the application, by clicking Apps and searching 'DocConnect'.

Swoosh DocConnect – Frequently Asked Questions

As much as we like to think that software applications are intuitive and easy to understand, there will always be questions from IT departments and end-users. This Frequently Asked Questions section for Swoosh DocConnect aims to answer some of the most common questions our team get.

Question 1 – Where can I find the latest version of the DocConnect application?

Log onto Swoosh Mission Control, locate the Swoosh DocConnect app, click Download and you will then be able to update your Swoosh DocConnect application to the latest version.

Question 2 – Swoosh has sent me an email that my DocConnect license is about to expire, do I need to do anything?

No you don't need to do anything. One of the best things about Swoosh is that it's an automated licensing engine; Swoosh is emailing you so you know that DocConnect licensing is due. If they haven't already, your nominated IT Service Partner will be providing you with an invoice for the upcoming license renewal. If you have paid it, Swoosh assigns DocConnect an updated license and there is no disruption to your use of DocConnect.

Question 3 – I'm having trouble activating my Swoosh DocConnect license, what do I do?

One of the first things that our Technical Team will check is that your organisation has accepted the license agreement for Swoosh DocConnect. To do this, go to Swoosh Mission Control and look at your licensed applications page. If you can't see DocConnect, then you will need to purchase a license before Swoosh will allow you access to the application.

Question 4 – I've placed the DocConnect application onto my Intranet home page, where do I configure the links and options available?

Good question. Like most Swoosh-managed applications, the options configurable for Swoosh DocConnect are found within the 365 Command module or Swoosh Admin; navigate to the Swoosh administration site for your Microsoft 365 tenant (see right).
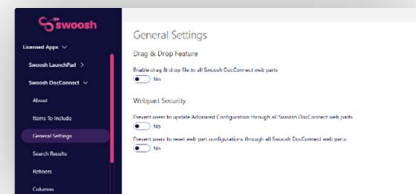
Question 5 – I've read that DocConnect is integrated with other Swoosh-managed applications, what are the applications?

As one of the first native Swoosh applications on the platform, the Swoosh Applications Team have created an integration with other solutions like LaunchPad, Calendar and People Search. However, the Swoosh DocConnect API can allow any Developer to integrate with DocConnect, bringing functionality into the launch window, and allowing dynamic interaction with search results across the Microsoft 365 platform.

If you have an application that you want deeper integration with on the Swoosh DocConnect, we encourage you to reach out to our Applications Team at: applications@swoosh.cloud and start a discussion.

THANK YOU