



Coveo Platform 7.0

Aha! Connector Guide

Notice

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1. Aha! Connector

CES 7.0.7711+ (December 2014)



Aha! provides Web-based product management tools and roadmapping software for agile product managers (see www.aha.io). The Coveo connector for Aha! allows Coveo administrators to index and integrate the Aha! content into the Coveo unified index and make it easily searchable by end-users.

The connector indexes the permissions on `Product lines` and `Products` so that in the Coveo search interfaces, an authenticated user can easily find any but only content to which he has access in the Aha! user interface.

1.1 Features

The Aha! connector features are:

Content indexing

The connector can retrieve and index exclusively the following Aha! content type:

- Product line
- Product
- Idea
- Feature
- Release
- Requirement
- Task
- Comment
- Attachment

1.2 Limitation

- Incremental refresh is not supported.

Feature History

CES version	Monthly release	Features
7.0.7338	January 2015	Adding default mapping file, field set, and JavaScript Search UI.
7.0.7711	December 2014	Connector introduction

What's Next?

Review the steps to deploy the Aha! connector (see "[Aha! Connector Deployment Overview](#)" on page 3).

2. Aha! Connector Deployment Overview

The following procedure outlines the steps needed to deploy the Aha! connector. The steps indicate the order in which you must perform configuration tasks on the Coveo server.

To deploy the Aha! connector

1. Validate that your environment meets the requirements (see ["Aha! Connector Requirements" on page 4](#)).
2. In Aha!, create and register an OAuth2 application to get an access token to be used by the Coveo connector (see ["Granting the Connector Access to Your Aha! Content" on page 5](#)).
3. On the Coveo server, in the Coveo Administration Tool:
 - a. **CES 7.0.7338+ (January 2015)** Create an Aha! field set to take advantage of the available Aha! metadata.
 - i. It is recommended to start by importing the default Aha! field set file (`[CES_Path]\Bin\Coveo.CES.CustomCrawlers.Aha.FieldSet.xml`) to create fields for all the metadata available by default from the Aha! content.
 - ii. When you created custom metadata for your Aha! content, add corresponding fields to the field set.
 - b. Configure and index an Aha! source.

The connector must know how to access your Aha! content to be able to index it (see ["Configuring and Indexing a Aha! Source" on page 7](#)).

3. Aha! Connector Requirements

Your environment must meet the following requirements to be able to use the Aha! connector:

- **CES 7.0.7256+ (December 2014)**

The connector was introduced with the CES 7.0.7256 December 2014 release.

- Coveo license for the Aha! connector

Your Coveo license must include support for the Aha! connector to be able to use this connector.

What's Next?

Get an access token to be used by the connector to gain access to your Aha! content (see ["Granting the Connector Access to Your Aha! Content" on page 5](#)).

4. Granting the Connector Access to Your Aha! Content

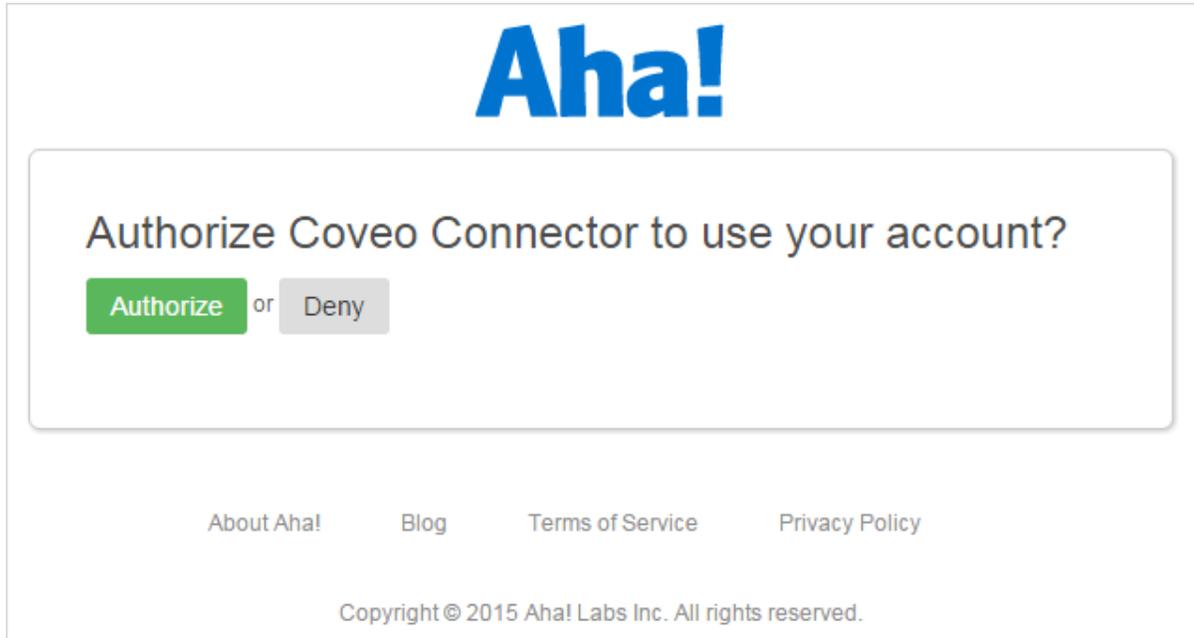
The Coveo Aha! connector needs an OAuth2 access token to gain access to and index your Aha! content. This is done from the Aha! web site by creating and registering an OAuth application and then get an OAuth access token (see the Aha! document [OAuth2 Authentication](#)).

To grant the connector access to your Aha! content

1. Using an Aha! account that has read permissions on all the items that you want to index, connect to Aha! (`[YourDomain].aha.io`).
2. Access the [applications](#) page to create and register your application:
 - a. Under **OAuth applications you have created**, click register a new application.
 - b. In the **Name** box, enter an application name that indicates its purpose, such as `Coveo Connector`.
 - c. In the **Redirect uri** box, enter `urn:ietf:wg:oauth:2.0:oob` to be able to receive and view the access token value directly in your browser address bar in [step 6](#).
 - d. Click **Save**.
3. In the **Application: [YourAppName]** page, copy the URL from the **Authorize URL** parameter.

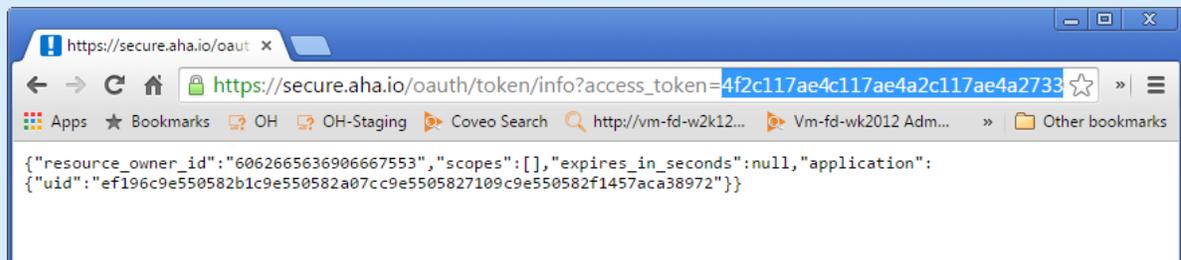


4. In a browser, paste the copied URL in the address box, and press enter.
5. In the **Authorize Coveo Connector to use your account?** page that appears, click **Authorize**.



6. In the next browser page displaying a JSON output returned by Aha!, in the browser address box, copy the access token value (string after `?access_token=`).

Example: In your browser address box, the URL looks like the following image. Copy the highlighted part, the access token value.



What's Next?

Create a Aha! source that will use the access token obtained in the above procedure (see ["Configuring and Indexing a Aha! Source"](#) on page 7).

5. Configuring and Indexing a Aha! Source

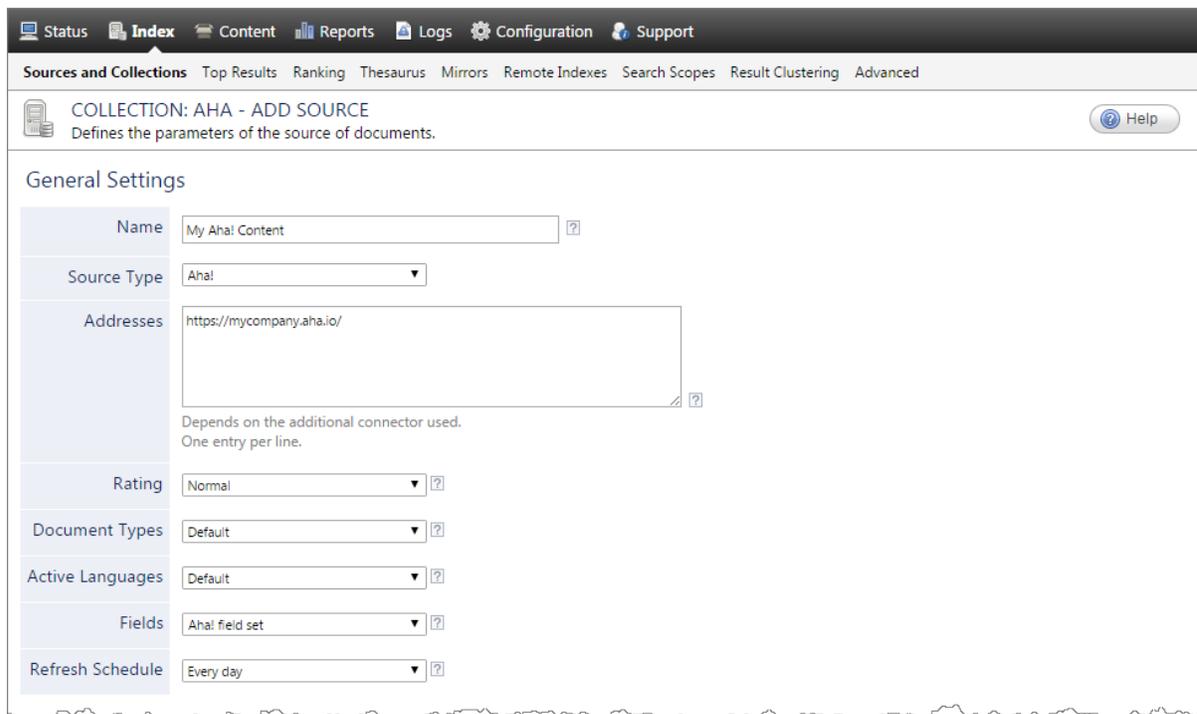
A source defines a set of configuration parameters for indexing the content of a specific Aha! account.

To configure and index an Aha! source

1. On the Coveo server, access the Administration Tool.
2. Select **Index > Sources and Collections**.
3. In the **Collections** section:
 - a. Select an existing collection in which you want to add the new source.
 - OR
 - b. Click **Add** to create a new collection.
4. In the **Sources** section, click **Add**.

The **Add Source** page that appears is organized in three sections.

5. In the **General Settings** section of the **Add Source** page:



The screenshot shows the 'Add Source' page in the Coveo Administration Tool. The page title is 'COLLECTION: AHA - ADD SOURCE' and it defines the parameters of the source of documents. The 'General Settings' section includes the following fields:

- Name:** My Aha! Content
- Source Type:** Aha!
- Addresses:** https://mycompany.aha.io/
- Rating:** Normal
- Document Types:** Default
- Active Languages:** Default
- Fields:** Aha! field set
- Refresh Schedule:** Every day

- a. Enter the appropriate value for the following required parameters:

Name

A descriptive name of your choice for the connector source.

Example: My Aha! Content

Source Type

The connector used by this source. In this case, select **Aha!**.

Addresses

The URL to access your Aha! content, typically in the form:

```
https://[domain].aha.io/
```

where you replace `[domain]` by your Aha! domain.

Fields

If you created an Aha! field set, select it.

Refresh Schedule

Time interval at which the index is automatically refreshed to keep the index content up-to-date. By default, the **Every day** option instructs CES to refresh the source everyday at 12 AM.

Because the Aha! connector does not support incremental refresh, keep this value. Consider using a shorter interval when your Aha! content changes frequently within a day and you need to have a better search result freshness.

Note: You can create a new or modify an existing source refresh schedule.

- b. Review the value for the following parameters that often do not need to be modified:

Rating

Change this value only when you want to globally change the ranking associated with all items in this source relative to the rating of other sources.

Example: If this source is for a legacy PLM, you may want to set this parameter to **Low**, so that in the search interface, results from this source appear later in the list compared to those from other sources.

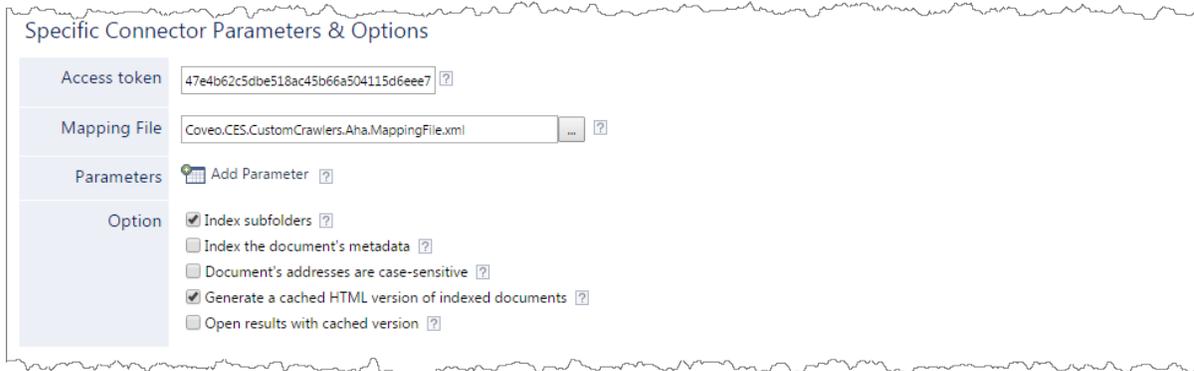
Document Types

If you created a custom document type set for this source, select it. Otherwise, leave **Default**.

Active Languages

If you defined custom active language sets, ensure to select the most appropriate for this source.

6. In the **Specific Connector Parameters & Options** section of the **Add Source** page:



Specific Connector Parameters & Options

Access token: 47e4b62c5dbes18ac45b66a504115d6eee7

Mapping File: Coveo.CES.CustomCrawlers.Aha.MappingFile.xml

Parameters: Add Parameter

Option:

- Index subfolders
- Index the document's metadata
- Document's addresses are case-sensitive
- Generate a cached HTML version of indexed documents
- Open results with cached version

- a. In the Access token box, paste the `access_token` value that you obtained previously (see "Granting the Connector Access to Your Aha! Content" on page 5).
- b. In the **Mapping File** box, leave the default mapping file name (`Coveo.CES.CustomCrawlers.Aha.MappingFile.xml`) unless you created a custom mapping file, in which case, enter the full path of your valid mapping file.
- c. In the **Option** section, the state of check boxes generally does not need to be changed:

Index Subfolders

Check to index all subfolders below the specified starting addresses.

Index the document's metadata

When selected, CES indexes all the document metadata, even metadata that are not associated with a field. The orphan metadata are added to the body of the document so that they can be searched using free text queries.

When cleared (default), only the values of system and custom fields that have the **Free Text Queries** attribute selected will be searchable without using a field query.

Example: A document has two metadata:

- `LastEditedBy` containing the value `Hector Smith`
- `Department` containing the value `RH`

In CES, the custom field `CorpDepartment` is bound to the metadata `Department` and its **Free Text Queries** attribute is selected.

When the **Index the document's metadata** option is cleared, searching for `RH` returns the document because a field is indexing this value. Searching for `hector` does not return the document because no field is indexing this value.

When the **Index the document's metadata** option is selected, searching for `hector` also returns the document because CES indexed orphan metadata.

Generate a cached HTML version of indexed documents

When you select this check box (recommended), at indexing time CES creates HTML versions of indexed documents and saves them in the unified index. In the search interfaces, users can then more rapidly review the content by clicking the **Quick View** link to open the HTML version of the item rather than opening the original document with the original application.

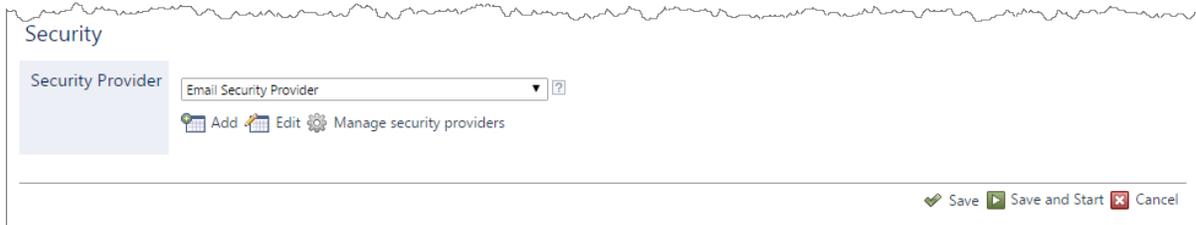
Consider clearing this check box only if you do not want to use **Quick View** links or to save resources when building the source.

Open results with cached version

Leave this check box cleared (recommended) so that in the search interfaces, the main search result link opens the original document with the original application. Consider selecting this check box only when you do not want users to be able to open the original document but only see the HTML version of the document as a Quick View. When this option is selected, you must also select the **Generate a cached HTML version of indexed documents** check box.

d. Click **Save** to save the source configuration.

7. In the **Security** section of the **Add Source** page:



- a. In the **Security Provider** drop-down list, select a security provider such as **Email** that resolves permissions to emails (like the Aha! connector does) so that users authenticated with their email address in a Coveo search interface can see the Aha! content to which they have the read permission.
- b. Click **Save and Start** to save your source configuration and start indexing.