

# **BEST PRACTICES**

## In Cosmetics Design

2016 Workshop

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# 1. Overview of eXo Platform

eXo began as an open source project in 2001, as the industry's first Java portlet container. This open source project grew into a company in 2003 as a response to client demand. That client -- the U.S. Department of Defense -- kicked off a tradition that continues to this day: Building great software in partnership with our clients. We can do this because we release our code to the markets which is how the U.S. Department of Defense found us, and at the same time, provide our clients with ongoing Enterprise-class maintenance, support and services. We opened the floodgates to **choice** in this market, and clients came.

Today, eXo Platform combines the intelligence and robustness of enterprise portal technology with the user experience design of modern enterprise social networks (ESN) to create the industry's first open source driven **Enterprise Social Collaboration Platform**.

Its commercially backed on-premise, cloud-ready and mobile software provides organizations with an easy way to deliver key applications and services their employees use every day.

It does this within a **unified, secure and user-friendly environment** to generate maximized user engagement, collaboration and productivity.

eXo is committed to **open standards** and to developing and leveraging best-of-breed open source technology. This enables enterprises to extend their software investments to create **rich and modern intranet solutions** that meet today's content-driven, social-enabled and collaborative computing needs while supporting multiple deployment models, including cloud and mobile. In short: to build the best **User Experience Platform**.



## 2. Feature Requirements

Sprague is seeking an intranet software that offers but is not limited to the following features:

### 2.1. User-friendly Interface

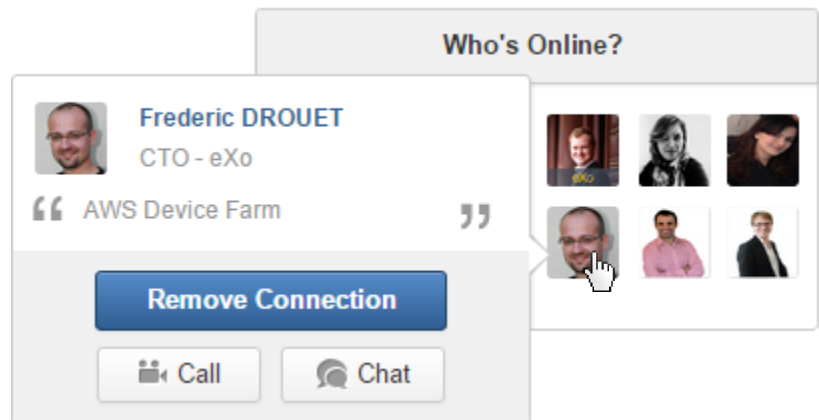
*“User-friendly interface for both end users and admins updating the site.”*

eXo Platform is a user-centered solution listed by industry experts (e.g. Gartner) as a User Experience Platform (UXP). Today, our Product team reports that the User Interface and the User Experience is among the highest rated features in our customer survey results. We believe this is due to the fact our user interface focuses on introducing elements of convenience and ease of use by end users.

- 1) **Convenience:** This can be experienced in many places. One example is the following scenario: A user can go to the Contact Directory to look for and connect with another user, or to the Chat application to find them there when he wants to message them privately. However, the user can also simply hover over the other user's name from anywhere inside the platform (e.g. after seeing an interesting comment they left, or from the “Who’s online?” box).

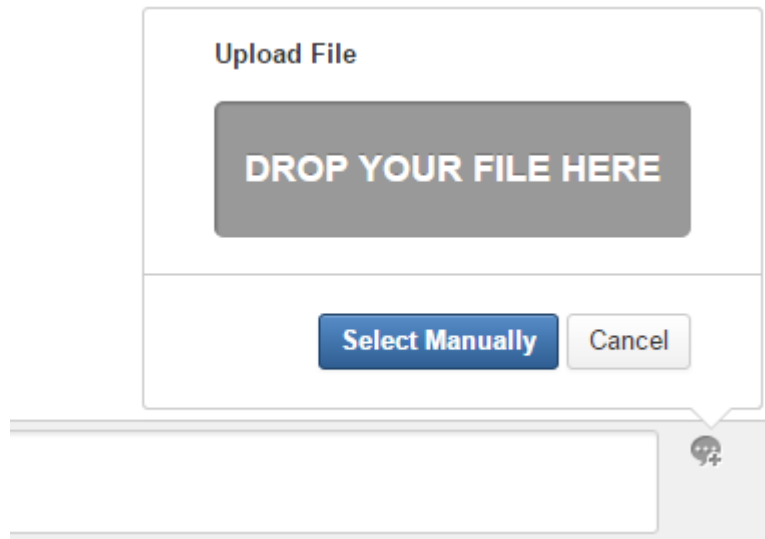
When the user hovers over their name, a little popup badge will appear to always provide the possibility to quickly Connect or Chat with them.

We believe that it is important to not only have a nice looking and clean interface, but also to make the interface behave in ways that are convenient to the end-user.



- 2) **Ease of Use:** There are many examples of this. Let us pick a collaborative scenario: The user is having a real-time discussion with another user or group and decides to share a file in real-time. Instead of following the typical procedure of clicking on the "Collaborative Actions" menu then selecting and clicking on "Share File", etc... The user simply drags the file from his computer into

the browser. The file upload popup shows up automatically where the user is instructed to drop his file, and the upload is done, thus skipping all of the above steps. The system here intelligently adapted to a nowadays common user behavior and promoted an easier way of doing things while keeping classical options available if needed. In other words, often times even what we believe is the easy way is not enforced as *the* only option: we understand that at times it is the end-user who should get to decide what is easy for him/her.



- 3) **Administrators Are End-users Too:** From site or page management, to user and group management, performing backups (thanks to our *Staging Extension*), tracking performance, and more, administrators can get things done from the platform's user-friendly interface.

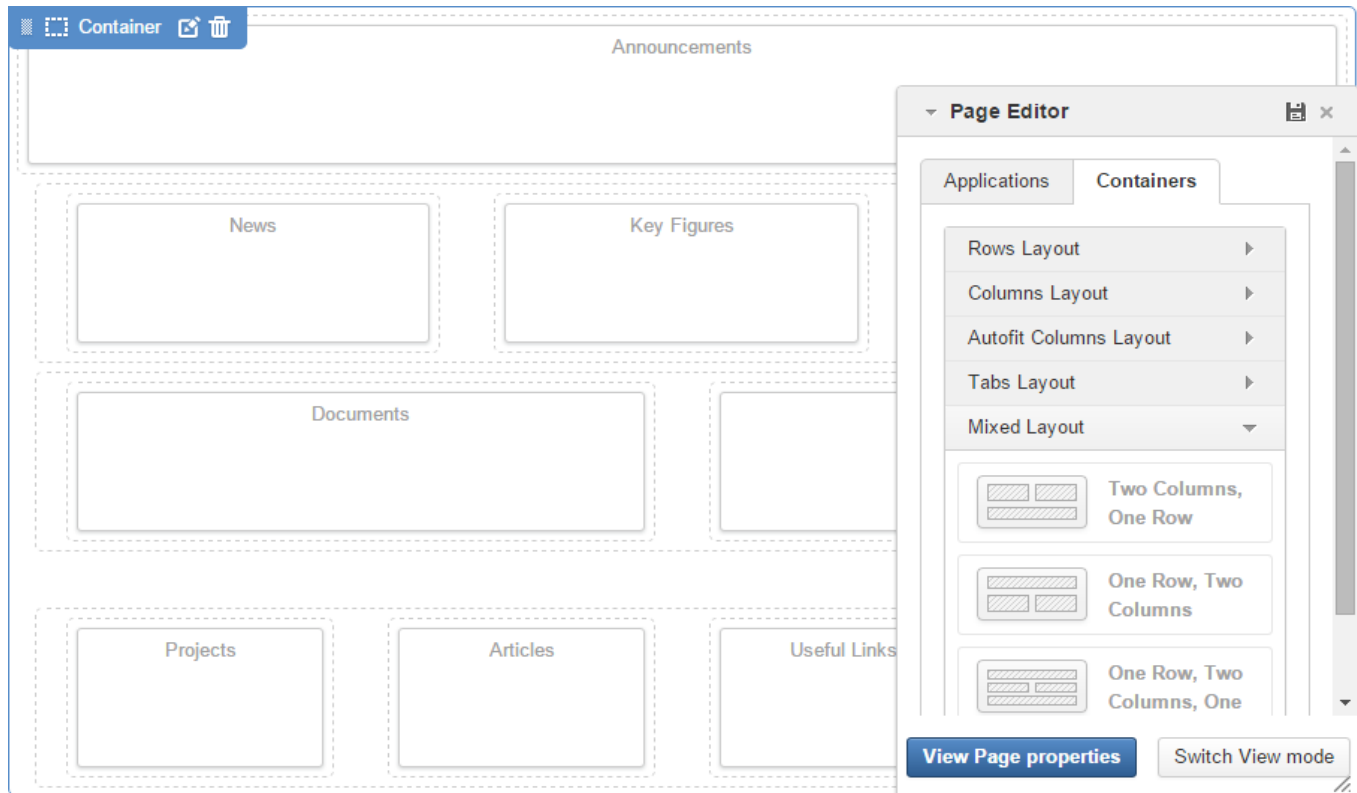
<span>User Management</span> <span>Group Management</span> <span>Membership Management</span>				
Search: <input type="text"/> User Name <input type="button" value="Search"/>				
User Name	Last Name	First Name	Email	Action
daisy	Smith	John	DaisyDocWriter@gmail.com	<input checked="" type="checkbox"/> <input type="checkbox"/>
jack	Miller	Jack	jack.miller@company.com	<input checked="" type="checkbox"/> <input type="checkbox"/>
james	Davis	James	james.davis@company.com	<input checked="" type="checkbox"/> <input type="checkbox"/>
john	Smith	John	JohnSmith@gmail.com	<input checked="" type="checkbox"/> <input type="checkbox"/>
kelvin	Aristote	Kelvin	Kelvin@intranet.com	<input checked="" type="checkbox"/> <input type="checkbox"/>
marine	Smith	Marine	MarSmith@gmail.com	<input checked="" type="checkbox"/> <input type="checkbox"/>
mary	Williams	Mary	mary@gmail.com	<input checked="" type="checkbox"/> <input type="checkbox"/>
micheal	Scotfield	Micheal	micheal@gmail.com	<input checked="" type="checkbox"/> <input type="checkbox"/>
root	Root	Root	root@localhost	<input checked="" type="checkbox"/> <input type="checkbox"/>

## 2.2. Templates

***“Ability for admins to customize pages within templates.”***

eXo provides an easily accessible page Layout Editor allowing admins to clearly see the page’s layout and the different sections and content containers within it. It is a “*what you see is what you get*” (WYSIWYG) type of editor where admins can:

- Drag and drop to add a new page layout to the page from the list of templates.
- Drag and drop to add content apps inside the different sections of this new layout (such as adding a news list app, an RSS feed app, a documents app, etc.).
- Set specific view permissions on these different sections and apps if they need to target specific audiences depending on their role in the organization.
- And more...



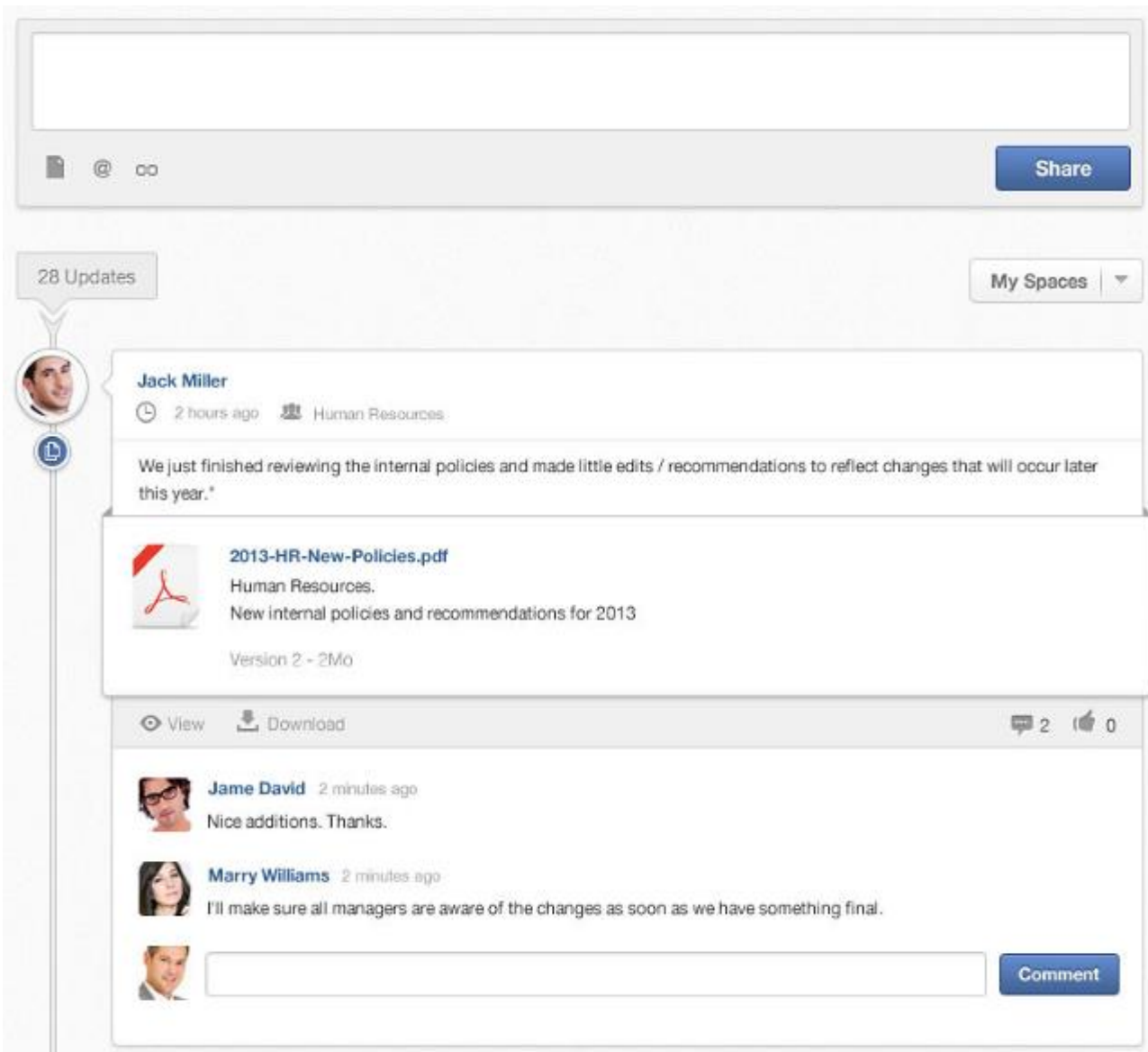
At a content level, eXo platform admins can also create and use content templates for rendering content inside pages in a way that is suitable for the company (see [section 3.17](#) about custom templates).

## 2.3. Message Posting

a) “Allow for recent posts/main news feed showing updates throughout the site.”

eXo provides both a social activity stream, as well as a traditional news feed.

The activity stream allows composing updates and sharing them with colleagues. It has features such as ‘@ mentions’, attaching files, liking, commenting, embedding both internal media content (such as videos, audio and images) and external content (such as Youtube/Vimeo videos, Slideshare slideshows, etc.) inside posts, and more.



The social activity stream doesn't only allow manual posting, it also automatically aggregates activity coming from different sources, such as other applications in the intranet, the activity of colleagues the user is connected with and activity within spaces the user is a member of.

The screenshot shows a social activity stream interface. On the left is a vertical sidebar with a user profile picture and a list icon. The main content area displays a post by Adam Smith, dated 'about 27 days ago', from the 'CAS Employees' group. The post is a poll titled 'Next Yearly Executive Meeting: Where should we do it?' with 10 voters. The poll results are shown as horizontal bars: San Francisco Office (30.00%, 3 votes), New York Office (20.0%, 2 votes), London Office (40.0%, 4 votes), and Singapore Office (10.0%, 1 vote). Below the poll is a 'Vote' button and a comment count of 1. A section titled 'You and 7 others liked this.' shows eight user profile pictures. At the bottom, a comment by Holly Jefferson, dated 'about 20 days ago', says 'Looks like London is winning this one!'.

Location	Percentage	Votes
San Francisco Office	30.00%	3 votes
New York Office	20.0%	2 votes
London Office	40.0%	4 votes
Singapore Office	10.0%	1 vote

A more traditional news feed is provided thanks to the “Content List Viewer” application which can be deployed on any page. It aggregates and displays news posts/articles in a dynamic feed. The style in which these posts are rendered in this feed would depend on the content template selected by admins.

**b) “Allow important messages to be ‘sticky’ until person sees message – with email notification option; tracking, confirmations.”**

eXo provides both **on-site** and **email** notifications.

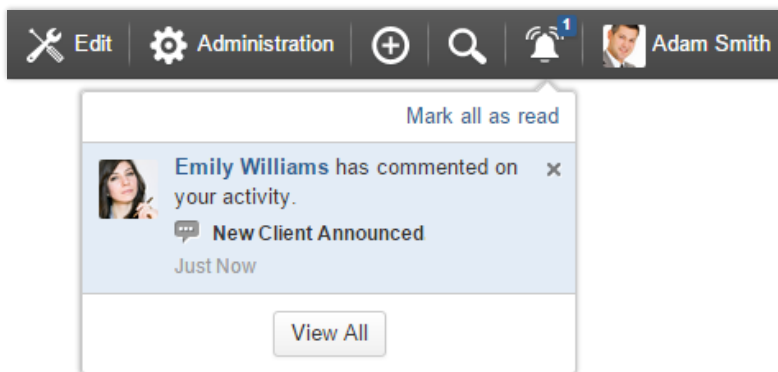


**On-site notifications** alert the user about important events in the system such as important posts. These notifications are “stickied” on the system’s (always visible) toolbar until the user marks them as read.

Any user can access his notification settings easily. The notification settings page shows a list of types of activities/events in the system, and allows the user to decide how to get notified about each one of them. For each even type, the user can select:

- Whether he would like an on-site notification, and/or:
- Whether he would like an immediate email notification, and/or:
- Whether he would like to include it in a single daily/weekly digest email.

Many users are already familiar with such notification system due to social media sites.



## Notification Settings

We will notify you whenever something involving you happens. The settings below will let you control how you want to be notified.

☒ YES ☐ Notify me by email ☒ YES ☐ Notify me on-site

Notify me when	How to get notifications
<b>General</b>	
Someone joins the social intranet	<input checked="" type="checkbox"/> Send me an email right away Send me a digest email <span>Daily</span> <input type="button" value="Save"/> <input checked="" type="checkbox"/> See on site
<b>Connections</b>	
Someone sends me a connection request	<input checked="" type="checkbox"/> Send me an email right away Send me a digest email <span>Daily</span> <input type="button" value="Save"/> <input checked="" type="checkbox"/> See on site
<b>Spaces</b>	
Someone requests to join one of my spaces	<input checked="" type="checkbox"/> Send me an email right away Send me a digest email <span>Weekly</span> <input type="button" value="Save"/> <input checked="" type="checkbox"/> See on site
I receive a Space invitation	<input checked="" type="checkbox"/> Send me an email right away Send me a digest email <span>Weekly</span> <input type="button" value="Save"/>

Additionally, and like many applications in eXo, this notification system has been created with developers in mind: in response to growing business needs, clients can decide to extend it by adding to the list a new activity type that will trigger a notification, as well as adding a new notification channel other than on-site and email (example: SMS notifications for field employees who don’t always have an internet connection).

c) “Allow for scheduled messages (to be pre-scheduled).”

A content publication lifecycle is available in eXo. It has up to 5 steps, from ‘Draft’ to ‘Published’ (and it is programmatically extensible with more steps depending on business needs).

After creating the content, the user can, instead of publishing it, put it in the ‘Staged’ status and pre-schedule it to be published and unpublished at pre-defined dates and times.

The 'Manage Publication' dialog has three tabs: 'Revision', 'Scheduled', and 'History'. The 'Revision' tab is active, showing a lifecycle diagram with five stages: Draft, Pending, Approved, Staged, and Published. The 'Staged' stage is selected and marked with a blue checkmark. An orange arrow points to the 'Scheduled' tab. Below the diagram is a table of revisions.

Revisions	Date	Author	Status	Action
Revision: eXo Platform 4.0 Release	Apr 12, 2013 3:01:04 PM	john	Staged[Current Revision]	
Revision: 1	Apr 12, 2013 3:46:15 PM	__system	Published	

Close

The 'Manage Publication' dialog has three tabs: 'Revision', 'Scheduled', and 'History'. The 'Scheduled' tab is active, showing a scheduling interface. It includes a text prompt, 'From' and 'To' date/time input fields, 'Save' and 'Reset' buttons, and a 'Close' button at the bottom.

You can schedule the publication of your document. Select the dates you would like to see your document published

From  To

Close

d) “Allow for message recurrence for important messages.”

The Enterprise Content Management module in eXo allows us to configure an ‘action’ to allow users to create recurrent messages.

**Manage Actions**

Available Actions **Add Action**

Create Action of Type exo:addMetadataAction

**Add/Edit Action**

Name:

Lifecycle: User Action  
Content Addition  
Property Addition  
Property Removal  
Property Modification

Metadata: dc:elementSet

Is Deep: ☒

Node Types:  + Q

Description:

Affected Node Types:  + Q

Save Back

e) “Allow for targeted messaging to certain user groups (management etc).”

For posts on the social activity stream, each group can have its own ‘space’ and each space can have its own activity stream. Any posts on a space’s activity stream target and notify only members of that space.

For messages on a content app (such as the content list viewer displaying a news feed, or a single content viewer displaying a banner/announcement, etc.) it is possible to set specific permission on each content that is created and published. This allows messages to target specific users and groups such as management, HR, developers, etc.

- Read rights allows the target group to see the message.
- Modify rights allow the target group to also edit the message.
- Remove rights allow the target group to also delete the message.

**Permission Management** ×

User Or Group	Read	Modify	Remove	Action
*:/developers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
*:/platform/users	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
any	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
john	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

**Add a permission to that node**

**Save** **Reset**

Read Right ☐    Modify Right ☐    Remove Right ☐

**Close**