



# GateIn User Guide

Version 3.1

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# 1 Preface

## 1.1 Overview

Beginning as an open source project in the year 2002, eXo is well-known as the industry's first Java portlet container. With the aim of dominating the potential portal market through robust and easy-to-use applications, eXo Project succeeded in attracting consumers in the whole world. eXo actually opened the floodgates to various options in many markets, and customers have been choosing eXo as the best method for their success.

The eXo Project grew into a company in 2003, as a response to customer demands. We can do this because we release our code in the open environment. It's how the DoD found us, when we were just university students hacking away, and it's how we choose to do business with our customers.

Today, eXo is a rapidly growing global company, with U.S. headquarters in San Francisco, California, global headquarters in France, and offices in Tunisia, Ukraine, and Vietnam. The Corporate has established technology leadership and proven values by their large European installed base and strategic partnerships with Red Hat, Capgemini, Atos Origin, and Bull.

GateIn is the perfect merge between Red Hat and eXo Platform in creating a new generation of Open Source portal that is robust and intuitive. With GateIn, both normal users and enterprises can enjoy many personalization and collaboration applications wherever and whenever. Advantages generated in GateIn, such as the interactive user interface, customizable look and feel, flexible internationalization and localization, facilitate the birth of many useful applications with a variety of rich utilities in the world market.

## 1.2 Purpose of the guide

The guide was written as a handbook, aiming at instructing step-by-step on how to use and to implement this application to the utmost. The information included herein will give basic steps that makes easy for users to follow through in-depth examples and clear explanations about the eXo Platform technology. Whether you major in technology or not, you are able to learn about or to work on GateIn 3.1 easily and efficiently.

The information provided in the guide is arranged into such a way that ensures readers to search and implement quickly and easily. We hope that readers can know more and master almost key strengths when using the GateIn 3.1.

The guide is an in-depth manual. This guide will focus on the followings:

- Define the basic concepts in GateIn 3.1.
- Provide step-by-step instructions to master GateIn 3.1.

## 1.3 References

### Information

- eXo Platform Home Page: <http://www.exoplatform.com/portal/public/website/>
- eXo Platform Wiki: <http://wiki.exoplatform.com/xwiki/bin/view/Main/>

### Support

- Forums: <http://forums.exoplatform.org>
- FAQ: <http://faq.exoplatform.org>



## 2 Getting Started

### 2.1 Glossary

#### 2.1.1 Portal

Portal can be defined as a key environment for making and implementing many applications and contents. In other words, the portal is a web-based application providing means to gather and personalize information via specific portlets with an interactive and consistent look and feel. Users and administrators are able to integrate information, people and processes via a web-based user interface.

#### 2.1.2 Portlet

Portlet is a pluggable component in a portal through which users can access some specific information, including supports, updates, or mini-applications). The portlet produces fragments of a markup code that are aggregated into a portal page. Typically, a portal page is displayed as a non-overlapping portlet windows collection, where each portlet window displays a portlet. Content generated by a portlet can be customized, depending on the configuration set by each user.

Portlets can be divided into two following types:

- Functional Portlet
- Interface Portlet

#### 2.1.3 Toolbar

Toolbar is a set of icons or buttons that is considered as a part of interface. It spans the top of the portal application and provides links to users and administrative actions.



If the current user logged in as an administrator or manager, the extra navigation so-called Site Editor will be displayed in the toolbar. In case of the user as user or demo, there are only three navigation types, including Site, Group, and Dashboard in the toolbar.

#### 2.1.4 Navigation

Navigation is a nodes set (menus) that helps users visualize the site structure and provides hyperlinks to move from one page to another quickly. Each node contains an internal name and a label which is shown on the menu. For any node, you can define either sub-nodes. The horizontal menu at the top of page is called the navigation bar. The GateIn's navigation is established to three levels: portal, group and user. On each level, any node can be defined. The navigation structure of one particular user is made up of portal navigation nodes (that are valid to all users), the nodes of all groups the user belongs to and individual nodes. The users' and groups' nodes are valid for all portals that are defined on the same eXo Portal server.

#### 2.1.4.1 Portal/Site's administration

This navigation level is to keep links to separate sites and/or portals of the parent portal. Each portal/site has only one navigation and it is automatically generated when a portal/site is created. Only users, who have the edit permission on a portal, can add nodes on this navigation level.

The name of a portal navigation looks like *portal:[portal name]'s nav*

For example, a portal navigation's name is *portal:classic's nav*”:

- ✓ 'portal' is the navigation level, meaning navigation nodes are defined for all users of a portal.
- ✓ 'classic' is the name of portal.
- ✓ 'nav' stands for 'navigation'.

#### 2.1.4.2 Group's navigation

All registered users are organized into groups. There is a navigation keeping the links to all pages of each group, called a group navigation. The content of this navigation differs, depending on the login account. The group's navigation is created manually by users who have the highest right in a group. Before adding nodes or creating pages for a group, you must create the group navigation. Also, there are nodes only applied to members with certain memberships.

The name of group navigation looks like *group:[group name]'s nav*.

For example, the group navigation name is “*group:platform/administrators's nav*”:

- ✓ 'group' is a type of navigation, meaning nodes are defined for a group.
- ✓ 'platform/administrators' is the path of a group, meaning navigation nodes are defined for the 'administrators' - the group that is a sub-group of 'platform' group.
- ✓ 'nav' stands for 'navigation'.

#### 2.1.4.3 User's navigation

Each user has its own navigation that contains links and portlets (or gadgets) selected by the user. A user's navigation is created or deleted automatically when the user is registered or deleted respectively. By default, the user navigation is empty.

The name of user's navigation has the format *user:[user name]'s nav*.

For example, the user navigation name is “*user:john's nav*”.

- ✓ 'user' is a navigation level, meaning navigation nodes are defined for one individual user.
- ✓ 'john' is the name of user.
- ✓ 'nav' stands for 'navigation'.

### 2.1.5 Gadget

Gadget is a mini web application running on a platform that a user can integrate and customize in the website.

To further see default gadgets in Gateln 3.1, please refer to the section "Use the Dashboard Workspace".

### 2.1.6 Access mode

Gateln has offered two modes by default:


- **Public mode** is for guest users (visitors) who have not registered yet. This mode is not

required to sign in, so guests can only visit the public pages in a portal. Visitors can also register to get an account. After having registered, they can use the private mode and have to contact their administrators to get more rights or the group manager if they want to become a member of that group.

- **Private mode** is for registered users who will apply their usernames and passwords to sign in. This mode supports users in taking many actions such as: managing private resources (creating private pages, editing or deleting them), "borrowing" pages from others by creating hyperlinks, changing the language for individual needs, managing private information.

## 2.1.7 Preview mode

In the preview mode, you can only view.

You can see this mode when you click the **Preview Page** icon  at step 3 of creating a page by wizard or editing a page by wizard.

## 2.1.8 Layout mode

In the layout mode, you are provided with some layout templates of portal or the page and you can use these templates to edit a portal or a page.

## 2.1.9 Permission

Permission is one of the most important factors on a portal. Permission settings control actions of user within the portal and set by the portal administrators.

### Permission types

Permission types define what a user can do within the portal. There are two available types as follows:

**Access Permission** enables users to utilize portal contents (signing in, viewing contents, rearranging portlets, and more). This permission can be set for multiple member groups.

**Edit Permission** enables users to change portal contents (changing portal or page information, deleting a portal/page). The edit permission is set for only one group at one time.

By default, **root** is set as the super user or the administrator of GateIn. He can do everything, while the others must get the appropriate rights (permissions) at first.

Rights in GateIn are not assigned to a single user but to a users group with specific membership types.

Similarly, the permission structure is always established as follows: *[membership type]:/[group path]*.

For example: *manager:/platform/administrators*. It means the right is set for users who are "manager" of the group "administrators". "Platform" is the parent group of "administrators".

Seemingly, groups are managed based on a hierarchy structure; but in fact, a sub-group does not have any inheritance from the parent group.

For example: we have a group structure as follows:

```
+ platform
  - administrators
  - guest
  - user
```

If users in the group “platform” can perform a function A, it does not mean that users in “administrator” or “guest” can do function A. The roles of users in groups are independent.

### Permission levels

Permission levels specify where the users's permission types can be applied into the portal. GateIn offers three permission levels as follows:

**Portal:** The permission at portal level includes actions permitted in all pages within the portal. Users with the **access** permission can view (but not edit) all the pages within the portal. Meanwhile, users with the **edit** permission at the portal level can change any page in the portal.

**Page:** The permission at page level restricts users to several particular pages. Users are only able to see and/or edit pages they have been given access to, depending on each permission type assigned to them.

**Portlet:** The permission at portlet level enables users to create a page through dragging and dropping portlets into a page. Some portlets are only used for administrators, while some are for individuals. Thus, administrators need to set proper access permissions for each specific group.

Permission types and levels can be effectively implemented to control who can do and what can be performed within the portal.

## 2.2 Initial implementation

### 2.2.1 Requirements

#### 2.2.1.1 Software

GateIn is a Java application. The GateIn trial version is free download. However, new functions are usually updated without testing and guaranty in trial versions. In order to purchase a full version with guaranty and tested functions, please contact to us at [sales@exoplatform.com](mailto:sales@exoplatform.com).

You can get the latest trial version package from this link:

<http://forge.objectweb.org/projects/exoplatform>. After downloading, you also need to download the following software which supports running GateIn:

- Download JDK (Java Development Kit) with version 1.5 or later.
- Application Server: GateIn Portal is a web application using the client–server model. So we need a server browser. You can use Jboss Application Server, Jonas Application Server or Apache Tomcat.
  - ✓ Jboss Application Server version 4.2.0 : <http://labs.jboss.com/>
  - ✓ Jonas Application Server version 4.8.4: <http://wiki.jonas.objectweb.org/>
  - ✓ Apache Tomcat version 6.x <http://tomcat.apache.org>
- A database is required. By default, HSQL is delivered with GateIn Portal so that you do not need to install a database. GateIn Portal can be used with the following databases:
  - HSQL (used by default)
  - My SQL
  - SQL Server
  - Oracle
  - PostgreSQL

- DB2

### 2.2.1.2 Hardware

Processor: 2.0 Ghz or higher

RAM : at least 512MB

## 2.2.2 Setup

### 2.2.2.1 Establish a base structure

To establish a base structure, do as follows:

**Step 1:** Create a "java" directory which is called \$EXO\_BASE\_DIRECTORY. By default, the \$EXO\_BASE\_DIRECTORY directory will be in your \$HOME directory in Linux and in D: drive in Windows.

**Step 2:** Install JDK and maven2 in the java directory.

**Step 3:** Set environment variable: JAVA\_HOME= EXO\_BASE\_DIRECTORY/JDK.

**Step 4:** Create an "exo-dependencies" and "exo-working" directories in the "java" directory.

**Step 5:** Copy a desired template application server directory to exo-dependencies. The directory name should have the form name of application server -**\${version}**. So the name of the directory may be **(tomcat-\$, jboss-\$, jonas-\$)**.

By the end, you have to have the following directory structure:

```
java/
    exo-dependencies/
        tomcat-${version}
        jboss-${version}
        jonas-${version}
    exo-working
    jdk1.5
    maven2
```

### 2.2.2.2 Configure an environment

To configure a suitable environment for GateIn implementation, do as follows:

**Step 1:** Copy \$EXO\_BASE\_DIRECTORY/eXoProjects/tools/trunk/config/maven2/template-settings.xml to your \$HOME/.m2/settings.xml and adapt the configuration to your environment. If you do this, the maven2/conf/settings.xml will be ignored. This step is mandatory for window environment.

**Step 2:** For Linux or Cygwin environment, you can bypass this step as the exoenv.sh script can copy and configure the settings.xml file automatically for you;

**Step 3:** In Linux or Cygwin environment:

-Copy

\$EXO\_BASE\_DIRECTORY/eXoProjects/tools/trunk/build/src/main/resources/linux/exoenv.

sh to your \$HOME or \$EXO\_BASE\_DIRECTORY directory.

- Backup the old one if you have one.

*In Window and DOS Environment:*

- Copy

\$EXO\_BASE\_DIRECTORY/eXoProjects/tools/trunk/build/src/main/resources/window/exoenv.bat to your \$HOME or EXO\_BASE\_DIRECTORY directory.

- Backup the old one if you have one.

**Step 4:** Update the Configuration: Edit exoenv.sh or exoenv.bat file to adapt it to your environment. You should only have to change the PORTABLE\_DIR variable at the beginning.

**Step 5:** Run the command to setup the environment: In linux or cygwin: source exoenv.sh. To check that it has worked well, open \$EXO\_BASE\_DIRECTORY/maven2/conf/settings.xml and check that the file corresponds to your environment, especially the definition of the repositories.

On window and dos prompt: exoenv.bat

### 2.2.2.3 Run commands

- Launch Tomcat

*In Linux or Cygwin Environment*

- Go to \$EXO\_BASE\_DIRECTORY/exo-working/exo-tomcat/bin directory.
- Change the rights on .sh files to make them executable : chmod +x \*.sh
- Run the command : gatein-dev.sh run or gatein.sh run

- Launch Jonas

*On Command line (Windows)*

- Run exoenv.bat in java directory.
- Go to \$EXO\_BASE\_DIRECTORY/exo-working/exo-jonas/bin/nt directory
- Run the command exo.bat start -fg

- Launch Jboss

*On Cygwin*

- Go to \$EXO\_BASE\_DIRECTORY/exo-working/exo-jboss/bin directory,
- Run the command: run.sh

## 2.3 Accounts

### 2.3.1 Register a new account

Unregistered users visiting the portal will be limited in the contents and several applications which are not set as public. Meanwhile, users who want to access in-depth contents or perform some actions in various applications, they should register by themselves, then contact the portal administrators to gain certain rights or permissions. To register a new account, do as follows:

**Step 1:** Click **Register** on the upper right corner of the GateIn homepage. The **Register New Account** form will appear.

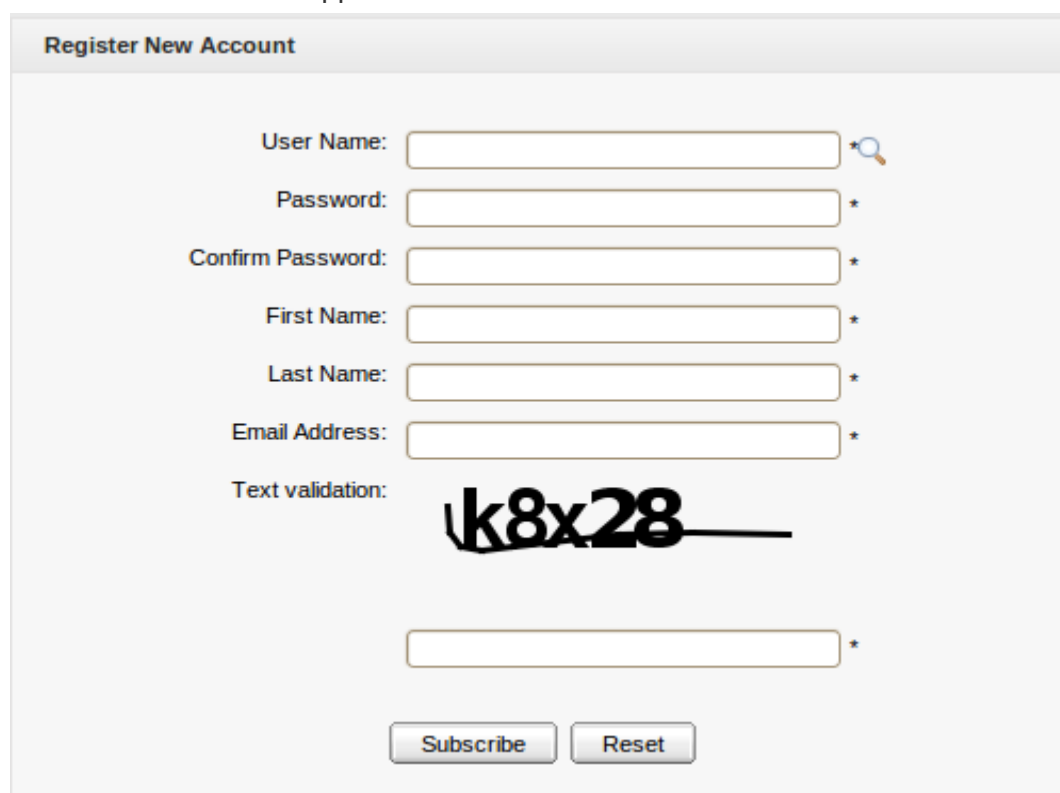


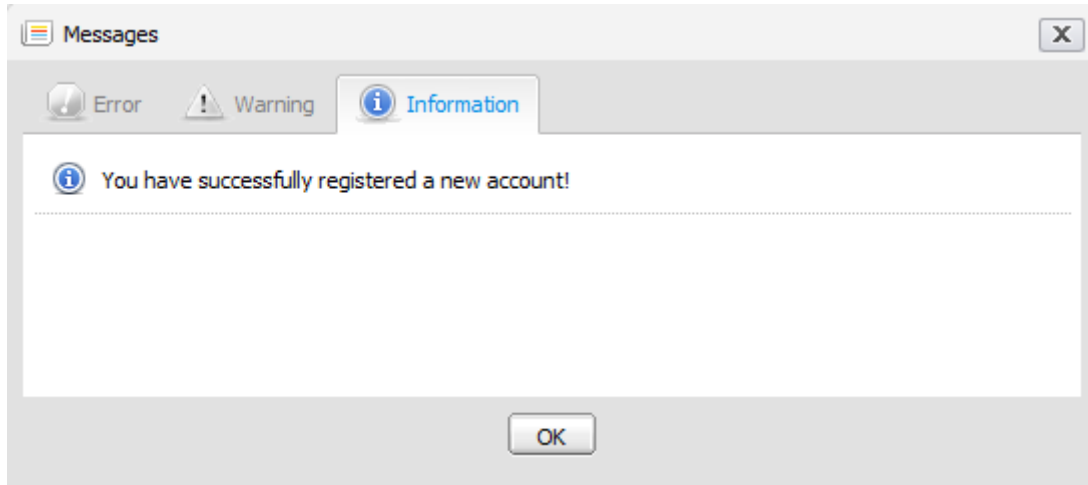
Illustration 1: The Register New Account form

Details:

- User Name:** The user's login name that must be unique with at least 3 characters. Only alpha, digit, and underscore characters are allowed.
- Password:** The password used to login that must have at least 6 characters.
- Confirm Password:** The re-typed password. The **Password** and **Confirm Password** must be the same.
- First Name:** The user's first name. This field must start with a character.
- Last Name:** The user's last name. This field must start with a character.
- Email Address:** The user's email that must be in the right format, for example *username@abc.com*.
- Text validation:** The text which is required to input to validate the registration.  
(\*) Required.

**Step 2:** Enter values for fields in this form.

**Step 3:** Click **Subscribe** to accept adding a new account, or **Reset** to clear the entered values. After you have clicked **Subscribe**, there will be a message which informs that you have registered your account successfully.



**Step 4:** Click **OK** to finish creating your account.

You cannot add a new account if one of alert messages appears:

- **User name** is existing or **User Name** is invalid.
- **Password** has less than 6 characters.
- **Password** and **Confirm Password** are not the same.
- **Email Address** is in a invalid format.
- Required fields are blank (empty).
- Text verification isn't correct.

After adding a new account, contact with your administrator to get rights or only be a visitor.

**Note:**


1. The magnifying glass icon is used to search whether the entered User Name exists or not. Once a user has registered by himself or the administrator has created a new account, the new user will become a part of the group "/platform/users" with membership by default.
2. The portal's administrator can allow the text validation field to appear or not. Follow these steps:

**Step 1:** Enter the portal as an administrator.

**Step 2:** Go to the **Register** portlet by entering the following URL:  
***http://localhost:8080/portal/private/classic/register.***

**Step 3:** Hover your mouse over **Site Editor** on the toolbar.

**Step 4:** Click **Edit Page** under the **Site Editor**.

**Step 5:** Hover your mouse over the area of **Register Portlet** and choose  .  
The **Edit Mode** will appear:



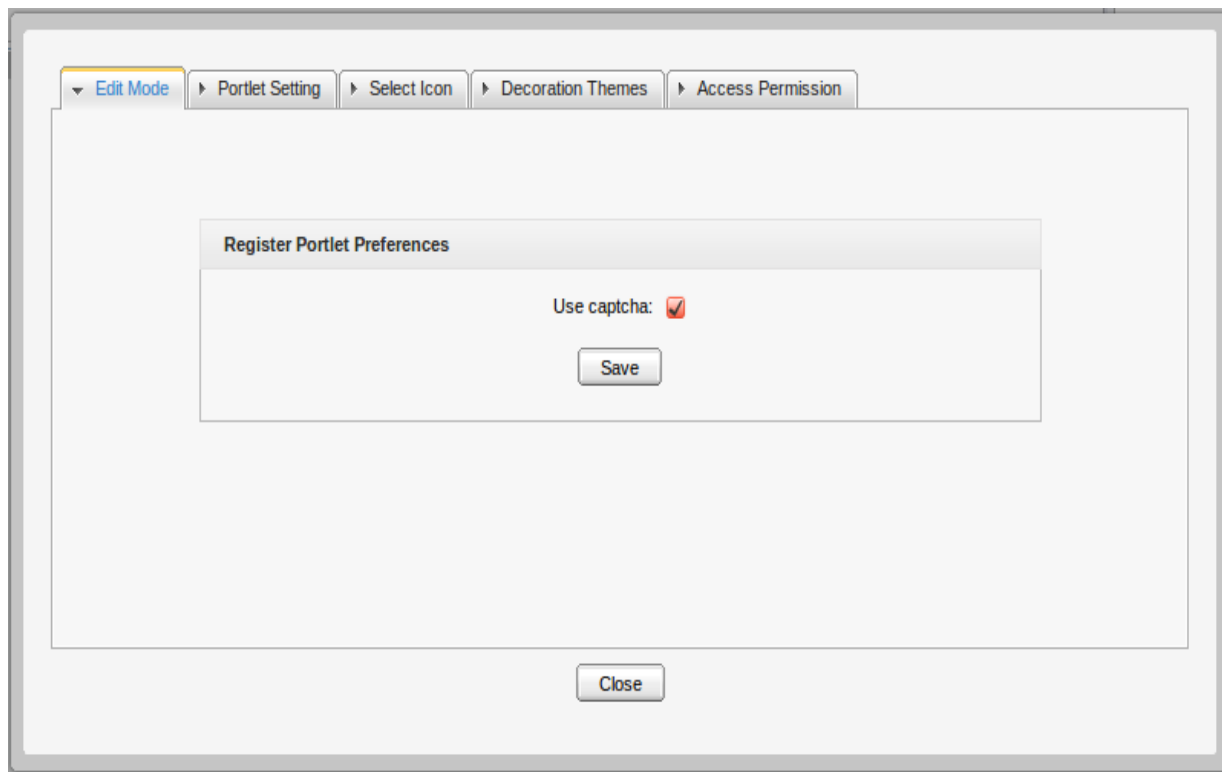



Illustration 2: Edit mode of register portlet

**Step 6:** Deselect the **User captcha**. Click **Save** if you want the Text validation field not to exist in the **Register New Account** form.

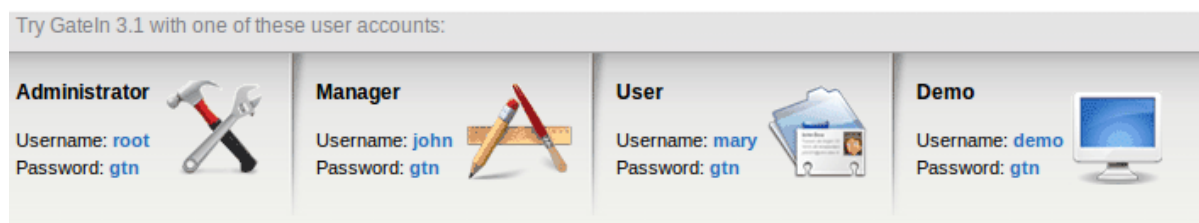
**Step 7:** Click **Close**, then click the Finish icon  on the top right of **Page Editor** to take effect.

Note that you can enter the Register portlet through another ways. For example, select **Site | Edit Navigation** (of the classic portal). Then, right-click the **Register** node and select **Edit Node's Page | the edit icon**.

## 2.3.2 Sign in & sign out

### 2.3.2.1 Sign in

By default, GateIn initializes some users with specific rights.



Details:

- Being an administrator, **root** has the highest right in any portal. Root controls all resources, such as users, groups, memberships, pages, navigations, portlets. Root can do anything in a portal except the private resources of another users.
- Being a manager, **john** can take some actions that are supported only for a manager.
- Being a visitor, **marry** is like a freedom user, so she can only visit and read news.

GateIn may be accessed by using a browser with a regular connection (HTTP). If you are using a default bundle installation in your local computer, you can access it through the URL. By default, the address `http://localhost:8080/portal/` runs into a portal named “classic”. Otherwise, you will have to contact your administrator to ask for the initial URL.

With GateIn 3.1, users can sign in the portal via 2 ways:

**The 1<sup>st</sup> way:**



**Illustration 3: The main screen of GateIn Portal**

**Step 1:** Click the **Sign in** link at the top right of the page. The **Sign in** form appears:

**Illustration 4: The Sign in form**

Details:

**User Name:**

To input the registered user name.

**Password:**

To give the password of your user name.

**Remember My Login:**

To allow you to return to the GateIn and to be automatically authenticated based on the cookie value provided by the browser. Thus, you do not have to perform an explicit authentication again.

**Forgot your User Name:**

To follow some steps to get the forgotten user name or password.

**Sign in**

To sign into the GateIn by the inputted user name and password.

**Discard**

To close the **Sign In** form.

**Step 2:** Input your registered **User name** and **Password**.

**Step 3:** Select the **Remember My Login** checkbox when you sign in GateIn 3.1 at the first time if you want to automatically return to GateIn 3.1 without signing in again. You can see the section "Remember User Account" for more details.

**Step 4:** Click the **Sign in** button to submit the form or the **Discard** button to quit.

Note that in case the user name does not exist or the user name/password is invalid, you will be returned to the **Sign In** form with an alert message. Type your user name or password again.

After signing in successfully, you will be redirected to the homepage and welcomed with

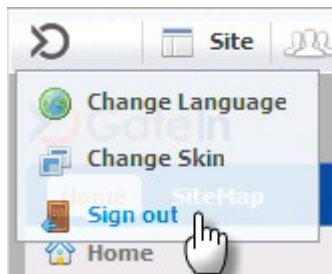


your full name on the top right corner of the page.

**The 2<sup>nd</sup> way:** Click directly the default user accounts at the lower of screen. You will be redirected to the portal.

### 2.3.2.2 Sign out

This feature ends the authenticated session and returns the user to the anonymous portal. To sign out, just hover your mouse over the **Sign Out** icon on the top right corner and click that icon.



### 2.3.3 Remember user account

Users who regularly return to GateIn 3.1 can be automatically authenticated to avoid doing an explicit authentication each time they access the portal. Follow these steps:

**Step 1:** Input your registered user name and password.

**Step 2:** Select **Remember My Login** when logging in GateIn 3.1 for the first time.

**Step 3:** Click **Sign In** to submit the form.

To be authenticated for the next time you sign in automatically, donot select to sign out when leaving the portal.

### 2.3.4 Change account settings

The function is to change your account information. To do so, click directly your account after logging in to open the **Account Profiles** form.



The **Account Profiles** form will be shown:

The screenshot shows a web-based dialog box titled 'Account Profiles'. It features two tabs at the top: 'Account Profiles' (which is active and highlighted in blue) and 'Change Password'. The 'Account Profiles' tab contains four text input fields, each followed by an asterisk indicating a required field. The fields are labeled 'User Name', 'First Name', 'Last Name', and 'Email'. The 'User Name' field contains the text 'root'. The 'First Name' field contains 'Root'. The 'Last Name' field contains 'Root'. The 'Email' field contains 'root@localhost'. Below these fields are two buttons: 'Save' and 'Reset'. At the bottom center of the dialog is a 'Close' button.

Illustration 5: The Account Profiles Dialog

***To change your Account Profiles, do as follows:***

**Step 1:** Select the **Account Profiles** tab.

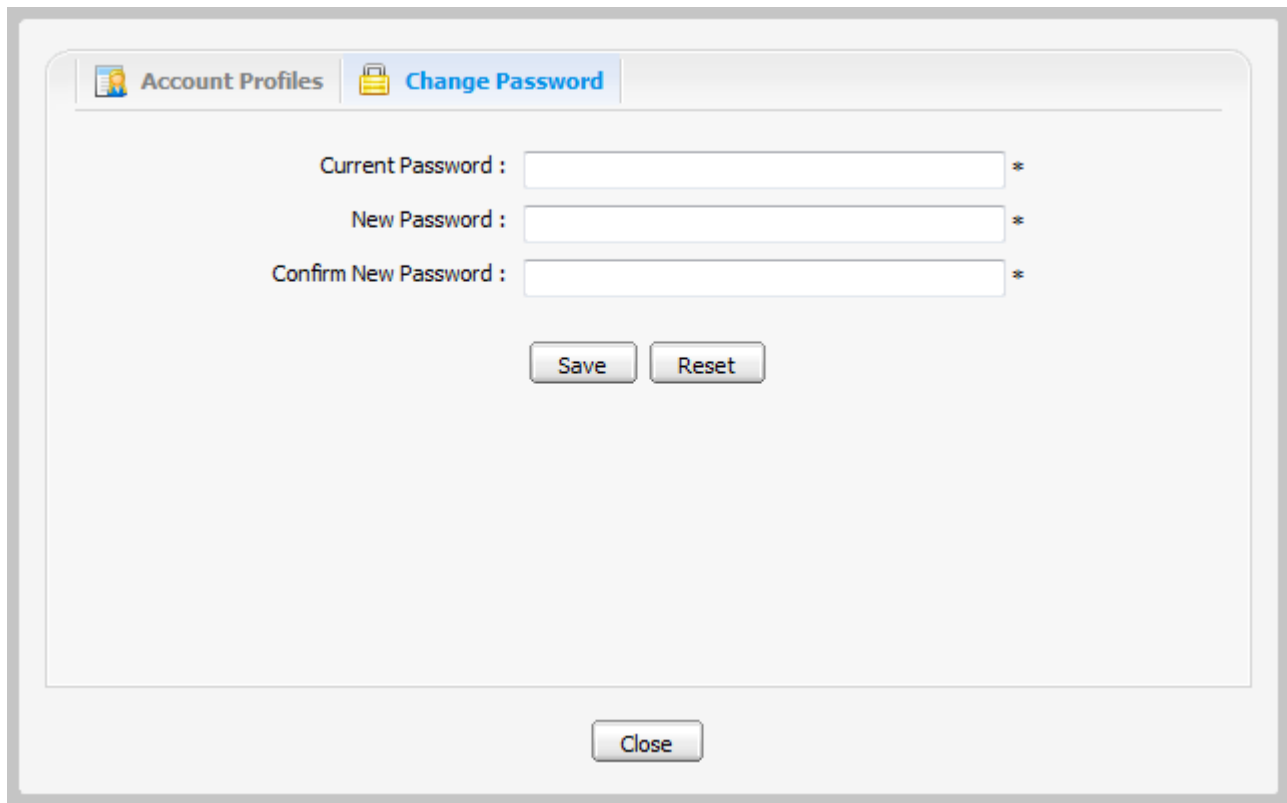
This tab displays current basic information about the current user.

**Step 2:** Change your **First Name**, **Last Name**, **Email**. Your **User Name** can not be changed.

**Step 3:** Click **Save** to accept changes.

***To change your Password, do as follows:***

**Step 1:** Select the **Change Password** tab.



The screenshot shows a web application window with two tabs: 'Account Profiles' and 'Change Password'. The 'Change Password' tab is selected. It contains three text input fields labeled 'Current Password', 'New Password', and 'Confirm New Password'. Each field has a small asterisk icon to its right. Below the fields are two buttons: 'Save' and 'Reset'. At the bottom center of the window is a 'Close' button.

Illustration 6: The Change Password tab

**Step 2:** Enter your current password to identify that you are the owner of this account.

**Step 3:** Enter your new password which must have at least 6 characters.

**Step 4:** Enter your new password again in the **Confirm New Password** field.

**Step 5:** Click **Save** to accept changes.

**Note:** If the default accounts' passwords have been changed, the user can no longer sign in the portal by clicking the default accounts directly in the lower of the page.

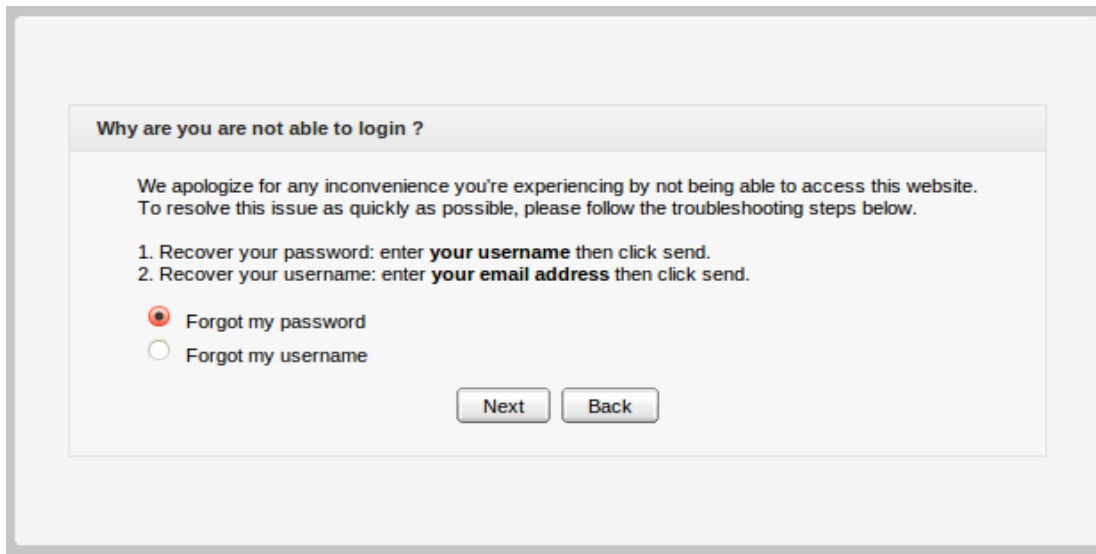
## 2.3.5 Retrieve account & password

In case you forget your account or password, you can recover following these steps:

**Step 1:** Click the link '**Forget your User Name/Password?**' beneath the **Password** field in the **Sign in** form.

This form offers two options:

- **Forgot my password.**
- **Forgot my username.**

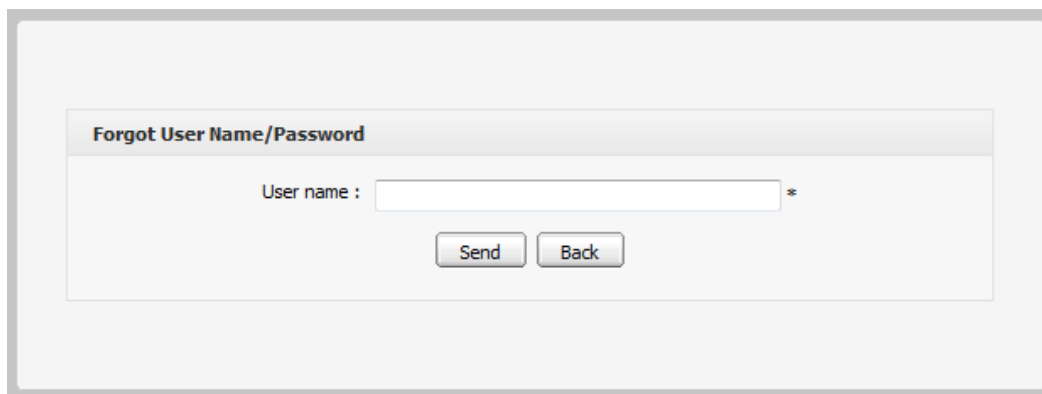


The screenshot shows a web-based dialog box with a light gray background. At the top, there is a title bar that reads "Why are you are not able to login ?". Below the title bar, the main content area contains the following text: "We apologize for any inconvenience you're experiencing by not being able to access this website. To resolve this issue as quickly as possible, please follow the troubleshooting steps below." This is followed by two numbered steps: "1. Recover your password: enter **your username** then click send." and "2. Recover your username: enter **your email address** then click send." Below these steps are two radio button options: "Forgot my password" (which is selected, indicated by a red dot) and "Forgot my username" (which is unselected, indicated by a white dot). At the bottom right of the dialog box, there are two buttons: "Next" and "Back".

**Step 2:** Select one appropriate option.

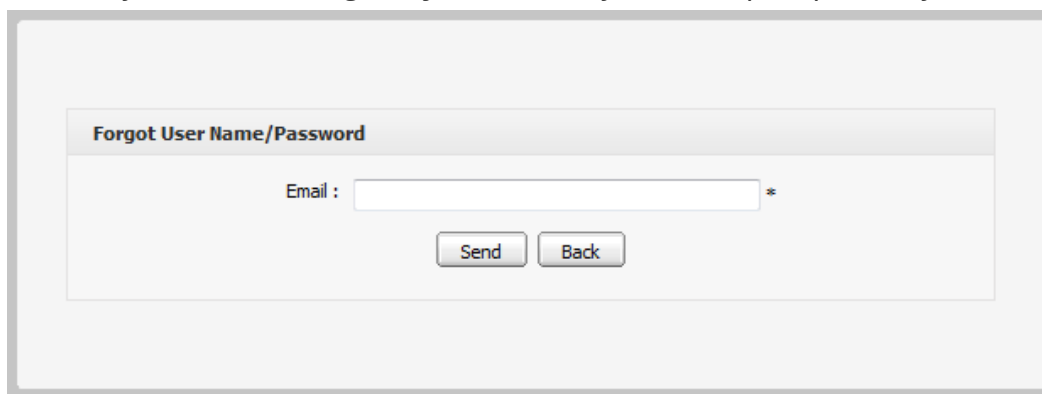
**Step 3:** Click **Next** to go the next step. You will be prompted to provide identification information, depending on your choice.

- If you select **Forgot my password**, you will be prompted for your user name:



The screenshot shows a web form titled "Forgot User Name/Password". Inside the form, there is a label "User name :" followed by a text input field. To the right of the input field is an asterisk (\*). Below the input field are two buttons: "Send" and "Back".

- If you selected **Forgot my username**, you will be prompted for your email:



The screenshot shows the same web form titled "Forgot User Name/Password". In this version, the label is "Email :" followed by a text input field. To the right of the input field is an asterisk (\*). Below the input field are two buttons: "Send" and "Back".

**Step 4:** Enter your **Username** or **Email** in the field of the above form.

**Step 5:** Click **Send** to submit the entered values.

After the form has been submitted, an email will be sent to your email address with the requested information.

- **If you forgot Username:** when retrieving Username, your old **Username** is still remained and reused.
- **If you forgot Password:** you will be sent a new password (as temporary), then you will be redirected to change password when you sign in.

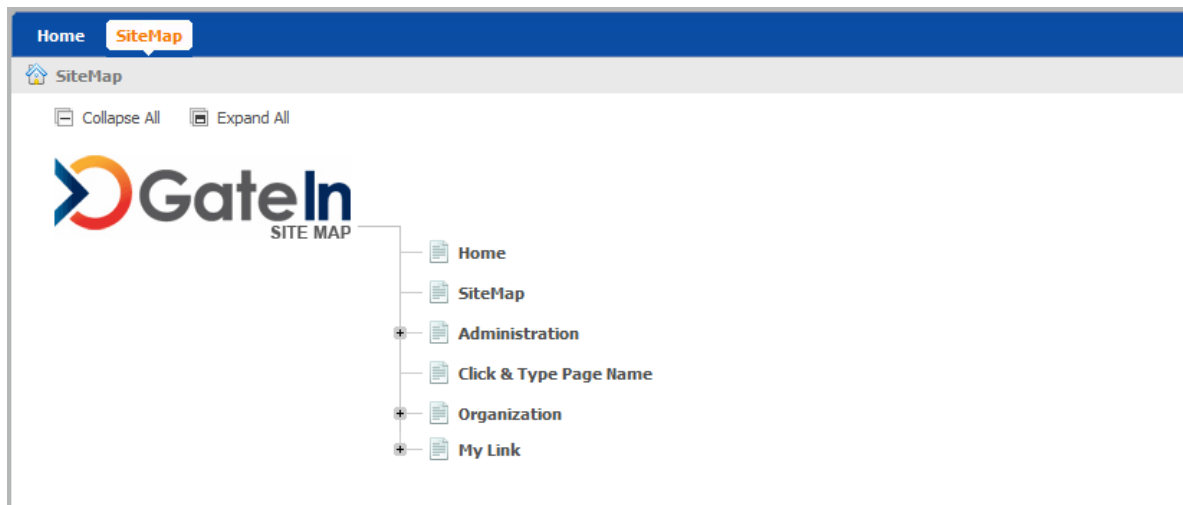
Note that the User name/Password that you received only takes effect for one day. It means that if the current duration is over one day from the receipt day, you cannot use the received User name/Password. Thus, you have to get another active email.

## 2.4 Manage sitemap

GateIn Site Map provides users with overall view of GateIn. Users can go directly pages through the SiteMap without going through the Administration toolbar.

**Step 1:** Go directly to the GateIn SiteMap on the navigation bar; or go to **Site | Classic | SiteMap**. The SiteMap page will appear:





**Step 2:** Click **Expand All** to see all pages inside (**Collapse All** enables you to back to the initial display).

**Step 3:** Click directly the title of page you want to manipulate.

## 2.5 Manage language

The priority order of display language is 1. User's language 2. Browser's language 3. Portal's language. Thus, to display your preferred language, you should pay attention to this order to change the language type appropriately.

### 2.5.1 Change the display language permanently


Do as any of following ways:

**The 1<sup>st</sup> way:**

**Step 1:** Click **Site** on the administration toolbar and select the portal that you want to edit.

**Step 2:** Click  **Edit Layout** which corresponds to the portal that you want to edit.

The portal will be displayed under the edit mode.

**Step 3:** Click  **Portal Properties** to edit portal properties.

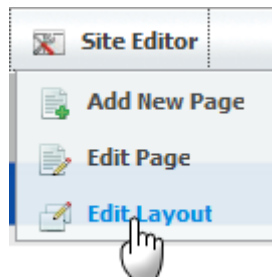
**Step 4:** In the **Portal Setting** tab: You can change display language of Portal by selecting another language in the **Locale** field.

**Step 5:** Click **Save** and **Finish** icon  to take affect.


**The 2<sup>nd</sup> way:**

**Step 1:** Click **Site** on the administration toolbar to open the portal list

**Step 2:** Click **Site Editor** and select **Edit Layout** in the menu:



The portal will be displayed under the edit mode.

**Step 3:** Click the button  **Portal Properties** to edit portal properties.

**Step 4:** In the **Portal Setting** tab, you can change the display language of Portal by selecting another language in the **Locale** field.


**Step 5:** Click **Save** and **Finish** icon  to take affect.

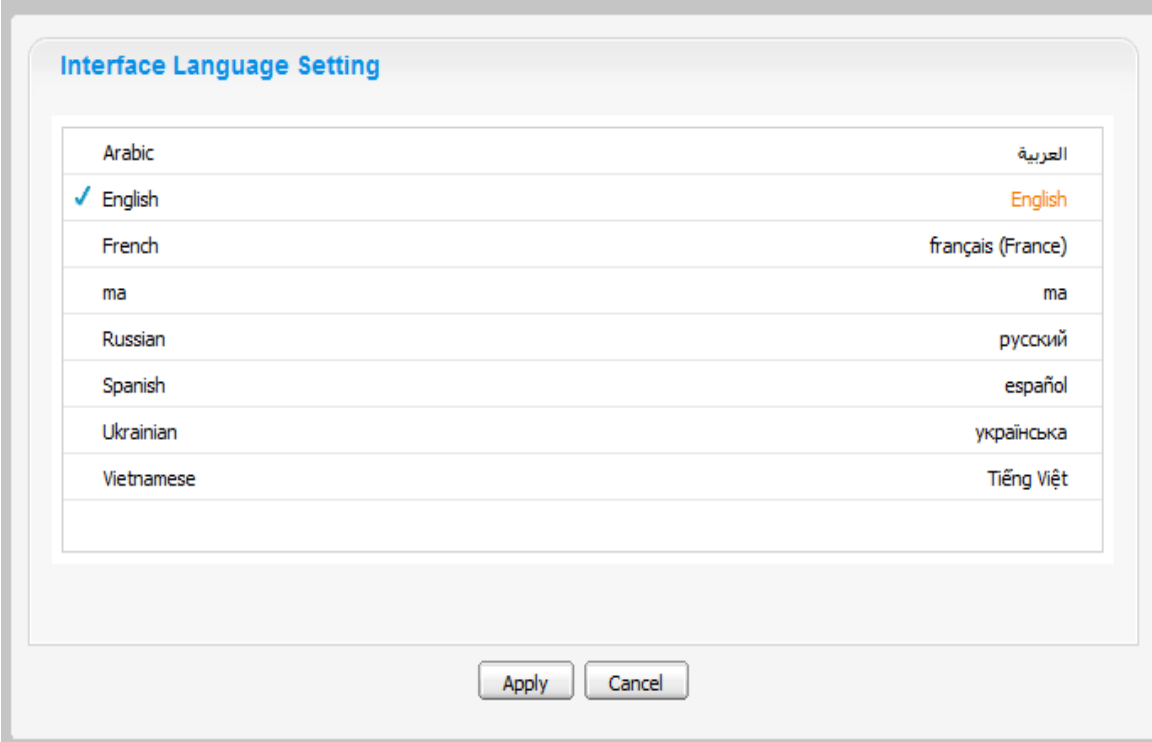
**The 3<sup>rd</sup> way:** This way is used to set the display language for yourself, not for displaying the language of Portal.

Only users having administration role can do this:

**Step 1:** Go to **Star | Change Language**.



The **Interface Language Setting** form is displayed with a list of all supported languages. The currently used language is marked by the icon .



Language	Native Script
Arabic	العربية
✓ English	English
French	français (France)
ma	ma
Russian	русский
Spanish	español
Ukrainian	українська
Vietnamese	Tiếng Việt

Apply Cancel

Illustration 7: The Interface Language Setting form

**Step 2:** Select another one by clicking the name of that language.

**Step 3:** Click **Apply** and wait for few seconds to take affect.

**Note:**

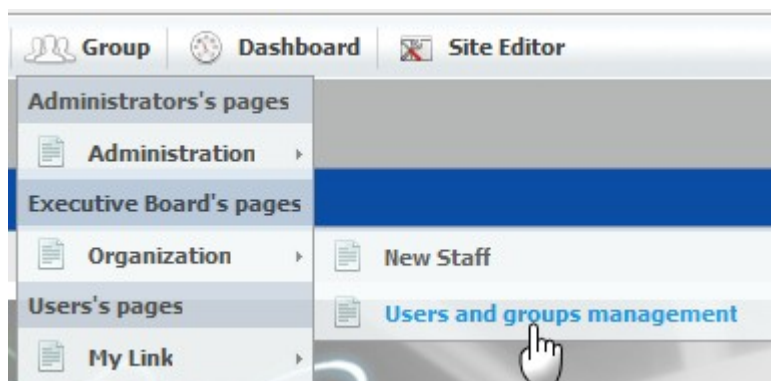
- *This display language will be kept permanently till you change your display language by another one.*
- *When you change from other language to Arabic or set the display language is Arabic. The display language on Portal will be changed to Right to Left (RTL) direction because when Arabists read, they usually read from Right to left.*


## 2.5.2 Change the display language for another user

By this way, you can change not only your display language but also the display language of another users if you have the access right in the **Organization** portlet.

Do as follows:

**Step 1:** Go to **Group | Organization | Users and groups management**



**Step 2:** Show the form to edit a user in list by clicking the edit icon  which corresponds to the user that you want to change the display language.

**Step 3:** Select the **User Profile** tab:

**Step 4:** Change the display language of this user by changing the value of the **Language** field.

**Step 5:** Click **Save** to accept changes, or **Cancel** to quit.

Thus, for the next time when the selected user signs in, the display language will be the language changed by the administrator.

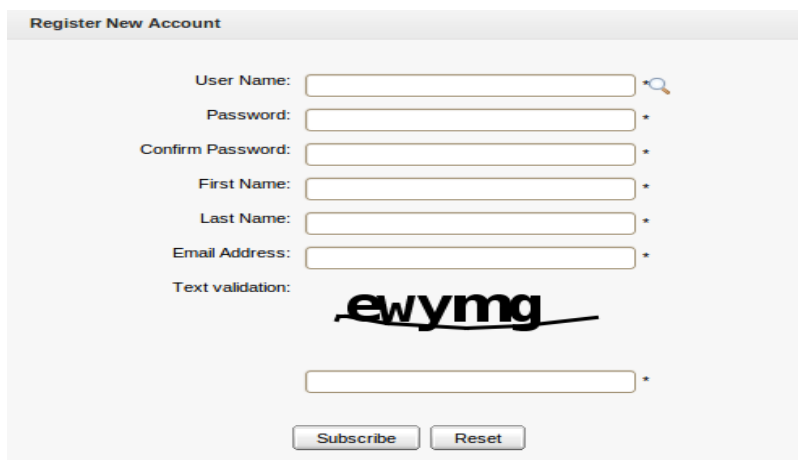
## 3 Portlets

### 3.1 Functional portlets

Functional portlets support all functions of a portal. They are built into the portal and accessed via toolbar links when the portal-related tasks are performed.

#### 3.1.1 Register portlet

This portlet is used to register a new account, including User Name, Password, Confirm Password, First Name, Last Name, Email Address, and Text validation.



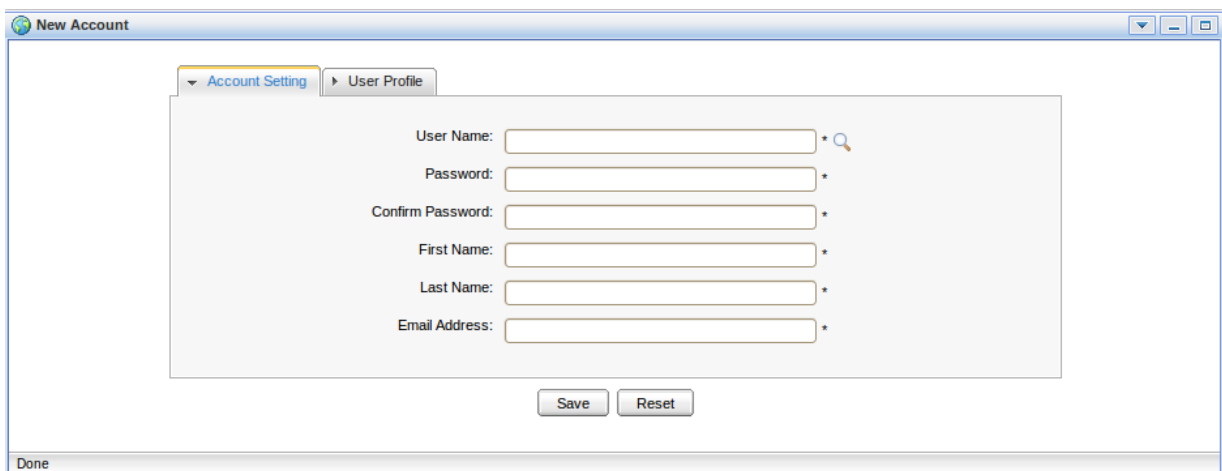
The 'Register New Account' form contains the following fields and controls:

- User Name:  (with a search icon)
- Password:  \*
- Confirm Password:  \*
- First Name:  \*
- Last Name:  \*
- Email Address:  \*
- Text validation:  (containing the text 'ewymg' with a signature-like underline)
- Buttons: 'Subscribe' and 'Reset'

Illustration 8: Register Portlet

#### 3.1.2 Account portlet

This portlet enables users to add a new account and choose their preferred languages for displaying the portal interface.



The 'New Account' window features a tabbed interface with two tabs: 'Account Setting' (selected) and 'User Profile'. The 'Account Setting' tab contains the following fields and controls:

- User Name:  \*
- Password:  \*
- Confirm Password:  \*
- First Name:  \*
- Last Name:  \*
- Email Address:  \*
- Buttons: 'Save' and 'Reset'

The window has a 'Done' button at the bottom left.

### 3.1.3 Organization portlet

This portlet is to manage user information, users groups and memberships. The form of this portlet is shown like:

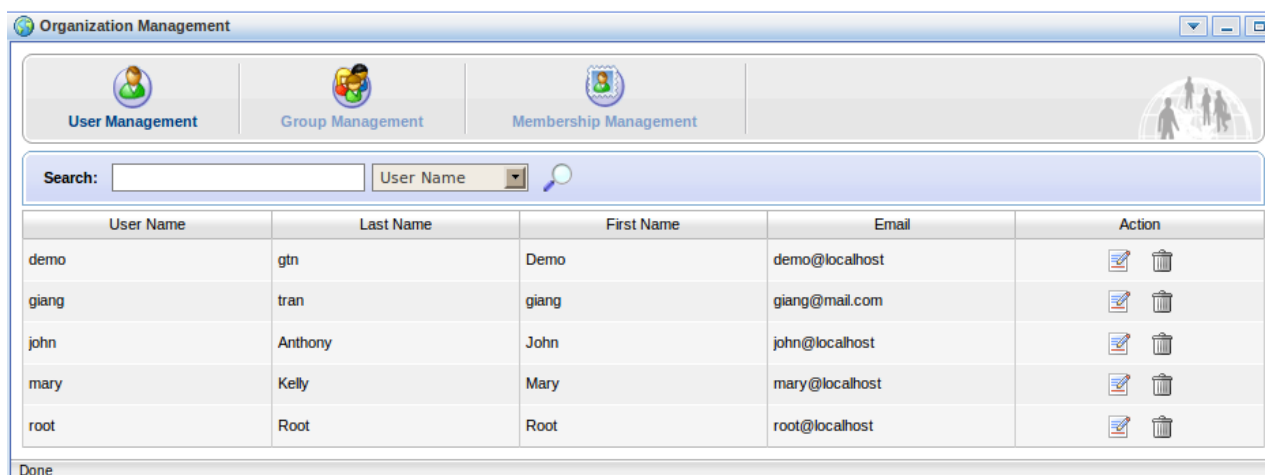


Illustration 9: The Organization Portlet interface

- **User Management:** To edit, delete, search and view existing users.
- **Group Management:** To view, add new, edit and delete a users group.
- **Membership Management:** To add, edit and delete memberships.

### 3.1.4 Application registry portlet

This portlet is used to manage different application categories. You can add, edit, set permissions, or delete categories, applications. The form of this portlet is shown as below:

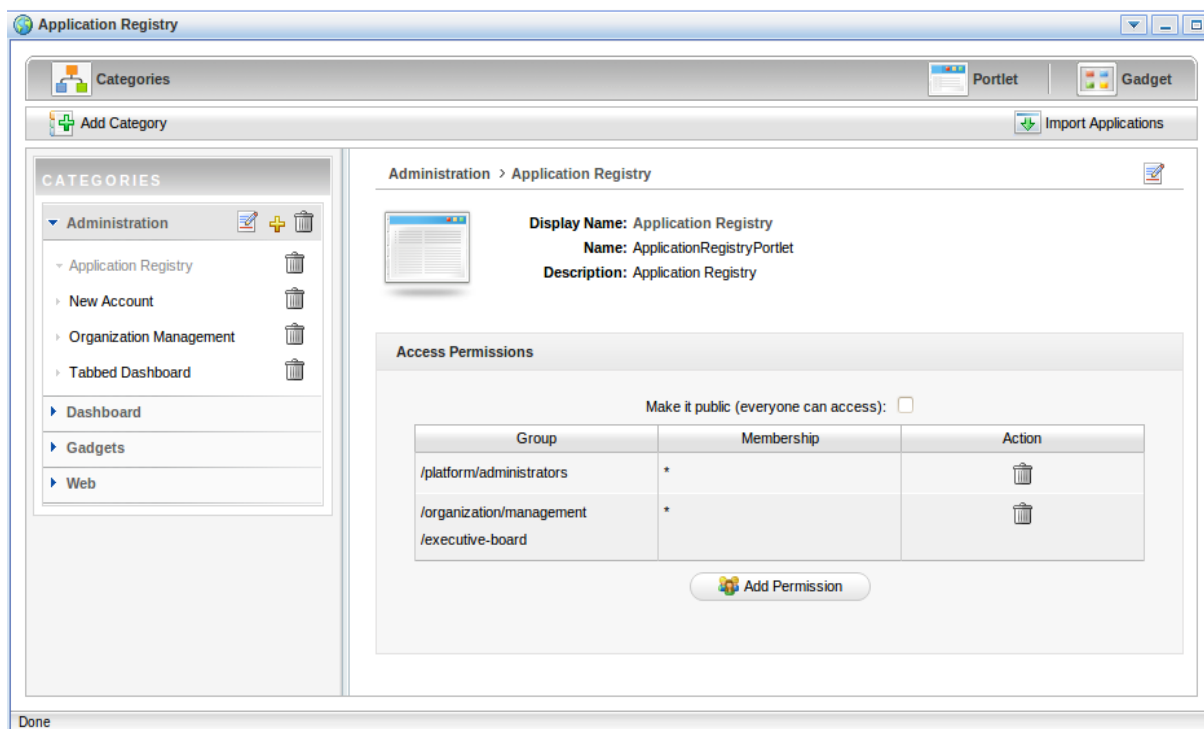


Illustration 10: The Application Registry Portlet

This portlet includes the following functions:

- Organize portlets/gadgets into different categories, such as creating a new category, importing default portlet categories, adding a portlet/gadget into a specific category, adding permission to a portlets category, and more.
- List portlets and view detailed information regarding to a specific portlet.
- Manage gadgets, including adding a remote gadget, creating a new gadget or deleting a gadget from the list.

### 3.1.5 Group navigation portlet

The Group Navigation portlet is to manage the navigation of different groups. In this portlet, you can add, edit, or delete a specific navigation.

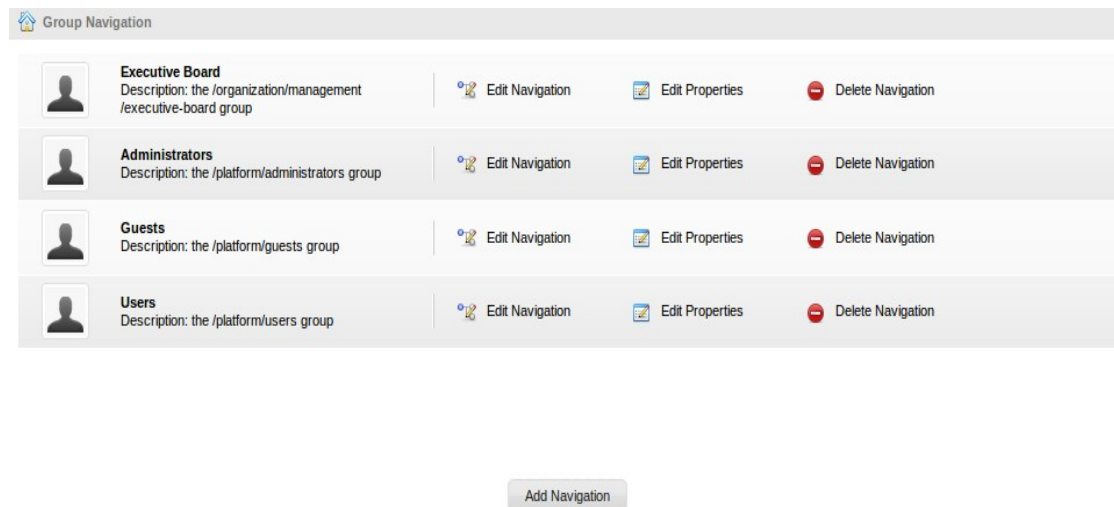


Illustration 11: Group Navigation Portlet

### 3.1.6 Page management portlet

The Page Management portlet is used to manage all pages on the portal. In the Page Management portlet, you can add, edit, or delete a specific page.

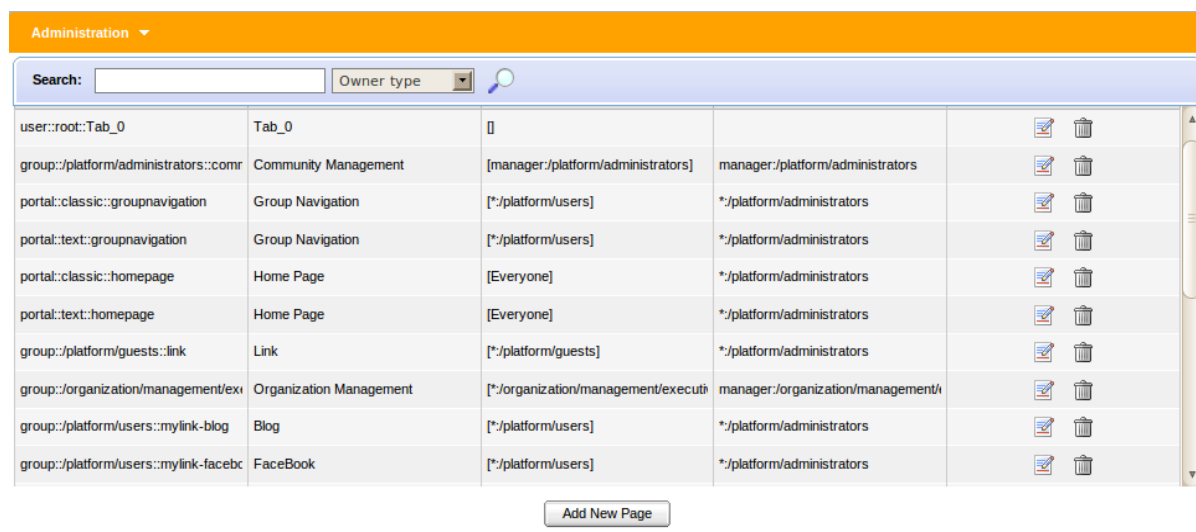


Illustration 12: Page Management Portlet

### 3.1.7 Portal navigation portlet

The portlet is to manage all portals in the GateIn. In the Portal Navigation portlet, you can add, edit, or delete a portal.



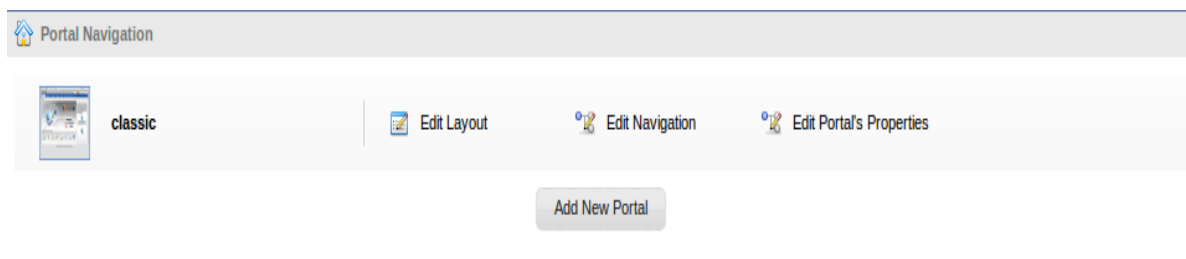


Illustration 13: Portal Navigation Portlet

### 3.1.8 Star toolbar portlet

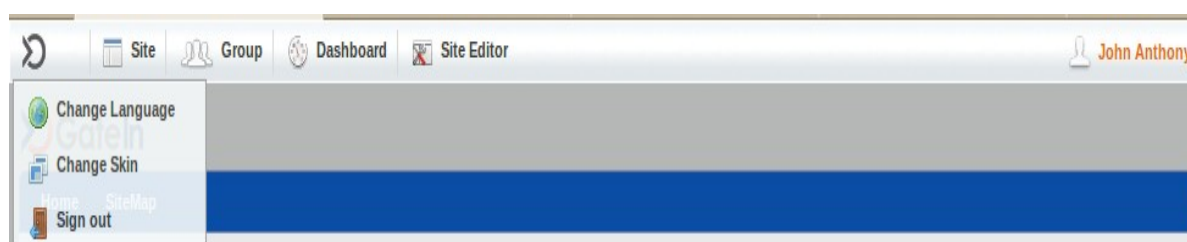


Illustration 14: Star Toolbar Portlet

The portlet displays a list of actions, such as Change Language, Change Skin, Sign Out.

### 3.1.9 Tabbed dashboard



The portlet displays Dashboard tabs that you can add gadgets inside by dragging and dropping them.

### 3.1.10 User info portlet

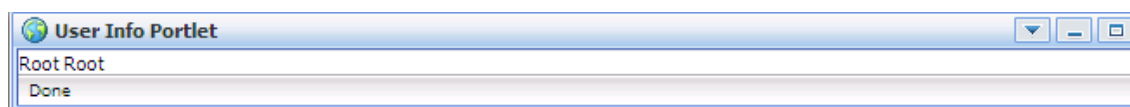


Illustration 15: The User Info Portlet Interface

The portlet displays personal information of a specific user that can be viewed and edited.

### 3.1.11 User toolbar dashboard portlet

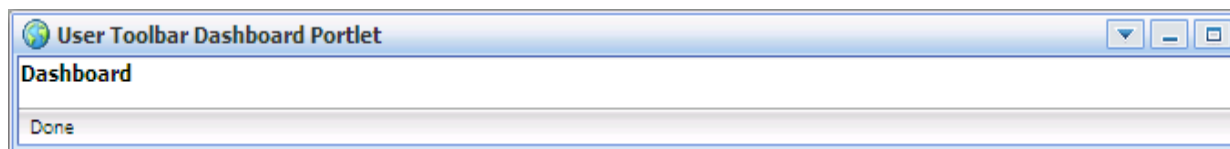


Illustration 16: The User toolbar dashboard portlet interface

The portlet displays the main dashboard menu that you can go inside to create dashboard tabs, add, or remove gadgets for each tab.

### 3.1.12 User toolbar group portlet

The portlet display the main group menu that you can go inside to create, edit and delete a specific group and the navigation for each group.

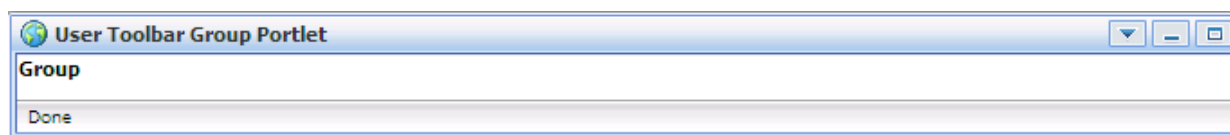


Illustration 17: The User toolbar group portlet interface

## 3.2 Interface portlet

Interface portlets constitute the interface of the GateIn portal that are the front-end components of the portal. They provide users with ways to interact with the portal. GateIn 3.1 provides the following Interface portlets:

### 3.2.1 Banner portlet



Illustration 18: The Banner portlet interface

The portlet is the welcome gateway of a portal. It contains slogan, logo and icon of an organization.

### 3.2.2 Breadcrumbs portlet

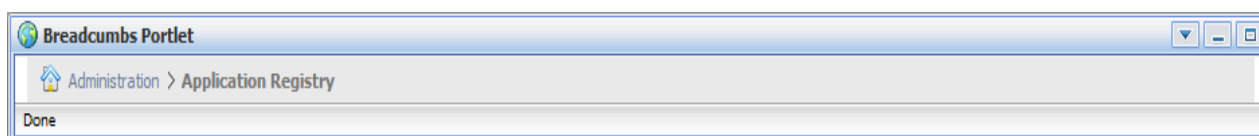


Illustration 19: The Breadcrumbs portlet interface

The portlet displays the navigation path of the selected page:

### 3.2.3 Footer portlet

Copyright © 2010. All rights reserved, Red Hat, Inc and eXo Platform SAS

Illustration 20: The Footer Portlet interface

The portlet provides a footer for a site. This footer can be a text, images that are displayed at the bottom of a website. It provides information about author/institutional sponsor, revision date, copyright, comments form, and navigational links.

### 3.2.4 HomePage portlet

The portlet is the homepage for a portal. The homepage is a main page (default page) which is the first page displayed when you visit the portal.



Illustration 21: The HomePage Portlet interface

### 3.2.5 IFrame portlet

The portlet is used to create IFrame elements for a site. The IFrame is an HTML element which can embed a different HTML document into a HTML document. So, the embedded document is displayed inside a sub-window of the browser window. This doesnot mean the full inclusion, the embedded document is independent and both documents are considered as separated documents.



Illustration 22: The IFrame Portlet interface

## 3.2.6 Navigation portlet

The portlet provides a navigation bar. A navigation bar is a menu that helps users visualize the site structure and provide links to quickly move from page to page:



Illustration 23: The Navigation Portlet interface

### Note:

When you create a new page that contains this portlet:

In the Preview mode: the portlet will be viewed as a normal page like above.

In the Save mode: the Navigation portlet will not be displayed normally when you open the page containing this portlet, because only the portal's navigation can be shown. It means that two navigations cannot be shown concurrently.

## 3.2.7 SiteMap portlet

The portlet displays a sitemap page of website. It is a graphical representation of a website. It lists pages on a website, typically organized in the hierarchical architecture to help visitors easily find pages on the site.

There are two options:

Collapse All: The sitemap will be displayed with the parent path only.

Expand All: The sitemap will be displayed with the parent paths and all their children paths.

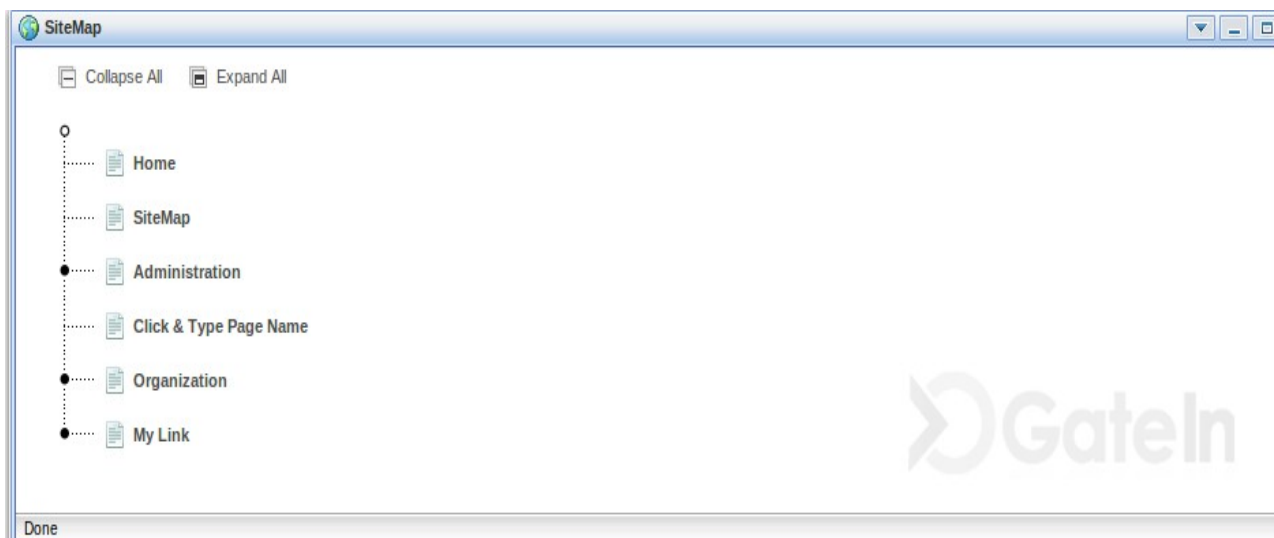


Illustration 24: The SiteMap Portlet interface

### 3.2.8 Web browser portlet

The portlet provides a web-browser-like application for users. It enables users to connect to other sites over Internet.



Illustration 25: The Browser Portlet interface

### 3.2.9 Dashboard portlet

The portlet is used for hosting mini-applications known as gadgets. The dashboard uses a variety of graphical effects for displaying, opening, and using gadgets. Gadgets can be moved around, rearranged, deleted and recreated in the dashboard. More than one instances of the same gadget can be opened at the same time, possibly with different settings.

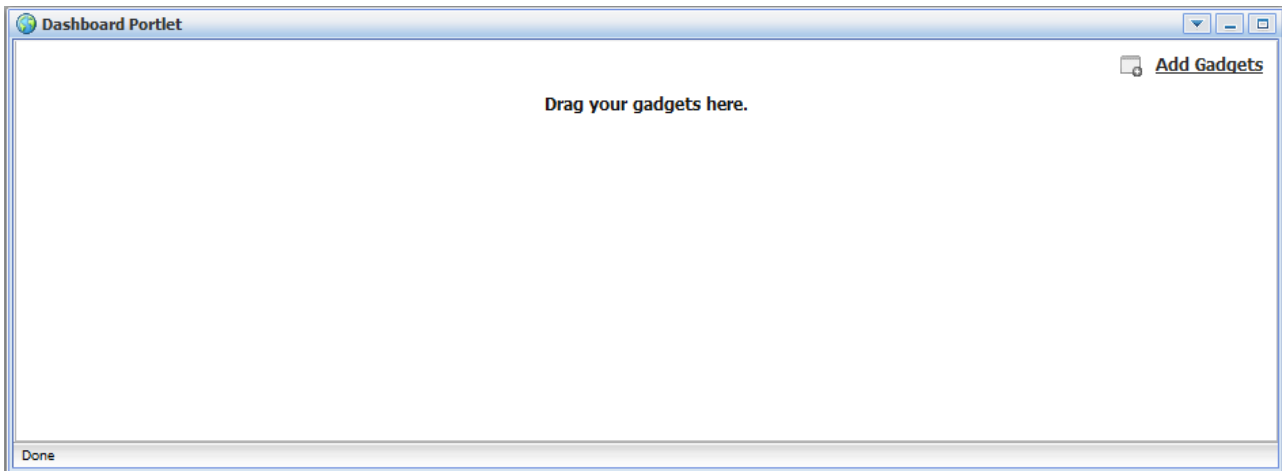


Illustration 26: The Dashboard portlet interface

### 3.2.10 Gadget wrapper portlet

This portlet allows users to view a gadget in the canvas mode.

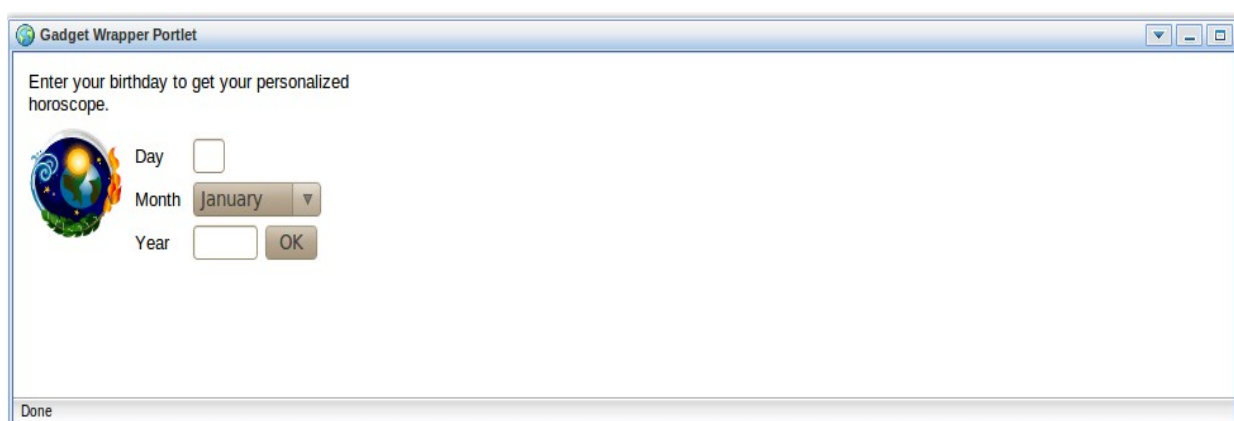


Illustration 27: Gadget Wrapper Portlet

## 3.3 Dashboard portlet

The dashboard portlet is to host mini-applications known as gadgets. The dashboard uses a variety of graphical effects for displaying, opening and using gadgets. Gadgets within the Dashboard portlet may be moved, or rearranged. Users can create new gadgets and delete unnecessary ones. Also, users can open many gadgets with different settings at one time.

### 3.3.1 Use the dashboard workspace

To use the Dashboard Workspace, do as follows:

**Step 1:** Click **Dashboard** on the toolbar.

**Step 2:** Click **Add Gadgets** to open the **Dashboard Workspace**.

The **Dashboard Workspace** lists all available gadgets. Four default gadgets are provided in GateIn 3.1; but you can add more.

The followings are default gadgets:

**Calendar** is to keep track of date in style. You also can switch easily between daily, monthly and yearly views and change the skin as you like.

**Todo** helps you organize your day and work group keeping track of your tasks in a convenient way. You can highlight tasks with different colors.

**Calculator** lets you perform most basic arithmetic operations. This mini-application can be themed to match your portal.

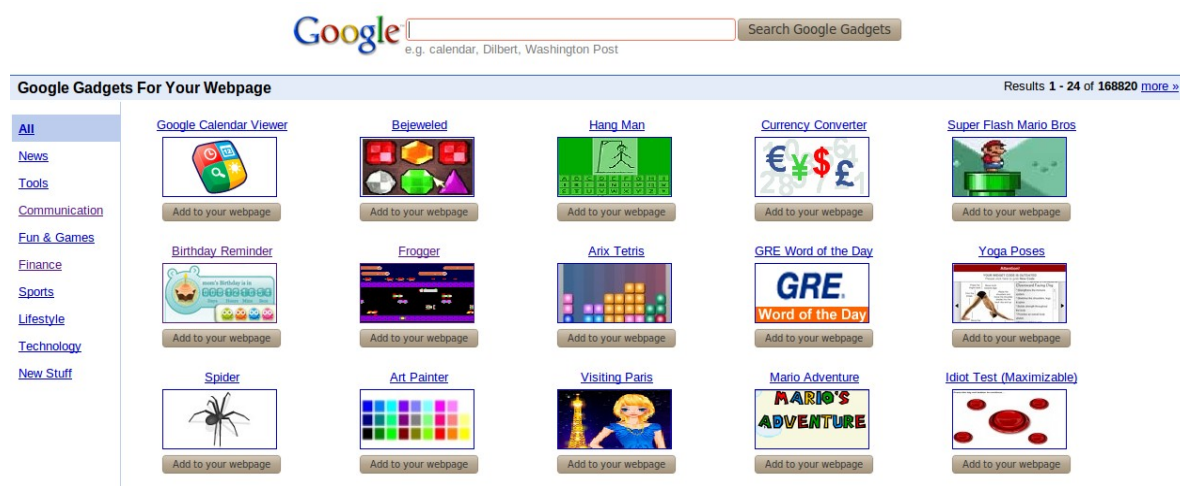
**RSS Reader** lets you get a sneak preview of your favorite feeds in one location. This content includes, but not limit to, news, posts, emails, all in one gadget. This gadget is a web-based one for receiving and viewing RSS feeds.

**Step 3:** Select a gadget in the Dashboard Workspace.

**Step 4:** Drag and drop the selected gadget into the Workspace.

In addition, many more gadgets can be found at the website:

<http://www.google.com/ig/directory?synd=open>. GateIn 3.1 is compatible with most gadgets available here.



### 3.3.2 Add more gadgets

To add more gadgets from external sources, do as follows:

**Step 1:** Open the URL (.xml or .rss) of your desired gadget.

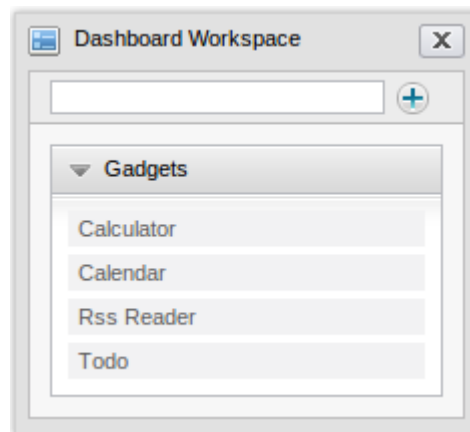
For example, <http://bejeweledg.googlecode.com/svn/trunk/bejeweled.xml>.

**Step 2:** Return to your portal, and click **Dashboard** on the toolbar.

**Step 3:** Click **Add Gadgets** in the **Dashboard** to open the **Dashboard Workspace**.

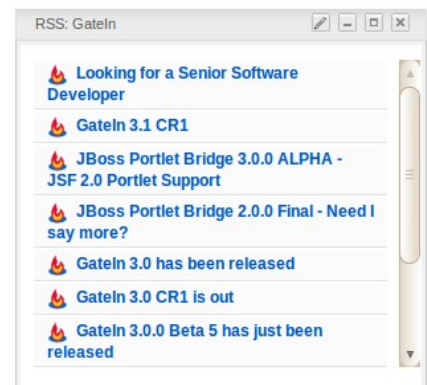
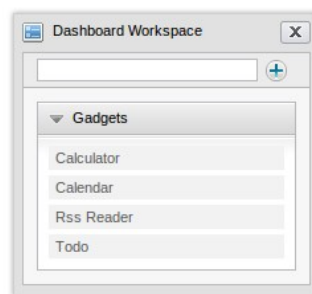
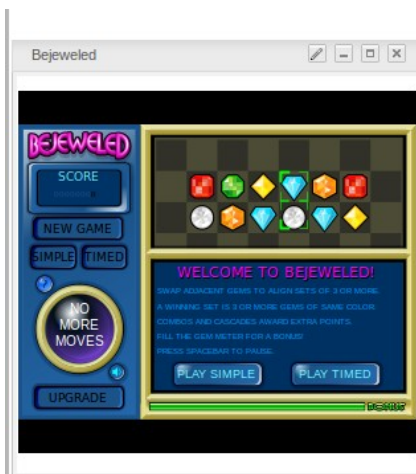
The **Dashboard Workspace** will appear:





**Step 4:** Paste the URL achieved in step 1 into the text box next to the icon  .

**Step 5:** Click the plus icon to add the new gadget to the page.





## 4 Administration Guide

*Note that functions stated in the part are advanced, so only users as administrators can use them.*

### 4.1 Manage GateIn

#### 4.1.1 Manage portals

##### 4.1.1.1 Create a new portal

In the current version, only users of at least one of the groups /platform/administrators or /organization/management/executive board can perform this function.  
This permission is set in the portal-configuration.xml file.

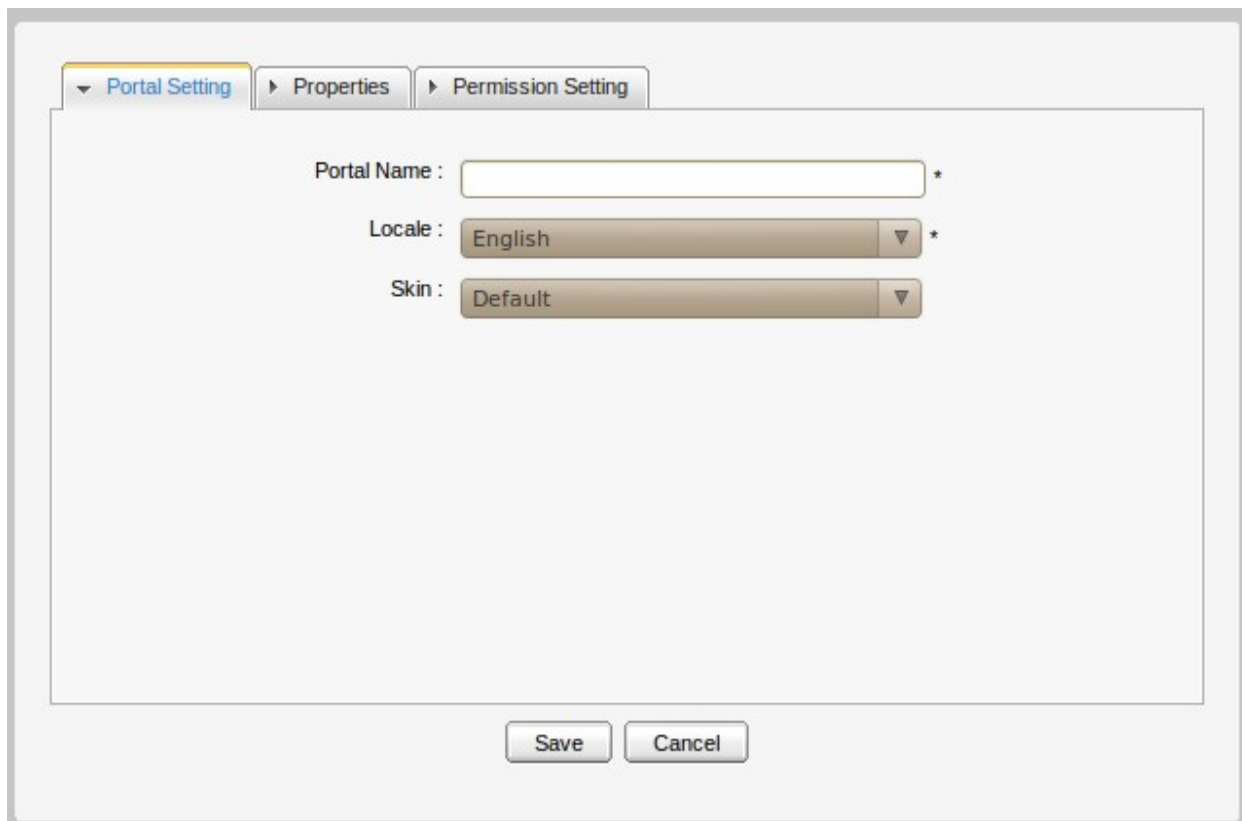
```
<value-param>
  <name>portal.creator.groups</name>
  <description>groups with membership type have permission to manage
portal</description>
  <value>*:/platform/administrators,*:/organization/management/executi
ve-board</value>
</value-param>
```

You need a special permission to create a new portal. An administrator can only give you this permission.

**Step 1:** Click **Site** on the toolbar to visit the **Portal Navigation** page.

**Step 2:** Select the button  .

By default, the **Create New Portal** window which contains the **Portal Setting** tab will open:



The screenshot shows a web-based configuration window for a portal. At the top, there are three tabs: 'Portal Setting' (which is selected and highlighted with a blue border), 'Properties', and 'Permission Setting'. Below the tabs, the 'Portal Setting' section contains three fields: 'Portal Name' with a text input box and an asterisk indicating it is required; 'Locale' with a dropdown menu currently set to 'English' and an asterisk; and 'Skin' with a dropdown menu currently set to 'Default'. At the bottom of the window, there are two buttons: 'Save' and 'Cancel'.

Illustration 28: The Portal Setting tab

**Step 3:** Enter a value for the **Portal Name** field. This field is required and must be unique. ONLY alphabetic, numeric and underscore characters are allowed for this field and the name must have at least 3 characters.

**Step 4:** Select the default display language for the portal in the **Locale** list.

**Step 5:** Select a skin for the portal by selecting one type. Currently, there are two skin types available, including Default and SimpleSkin.

**Step 6:** Click the **Properties** tab to select **Keep session alive**. There are 3 options:

- **Never:** The session will never timeout, even if an application requests it.
- **On-demand:** The session will timeout if an application requests it.
- **Always:** The session will timeout after a set period.

**Step 7:** Click the **Permission Setting** tab and set the permissions for the portal.

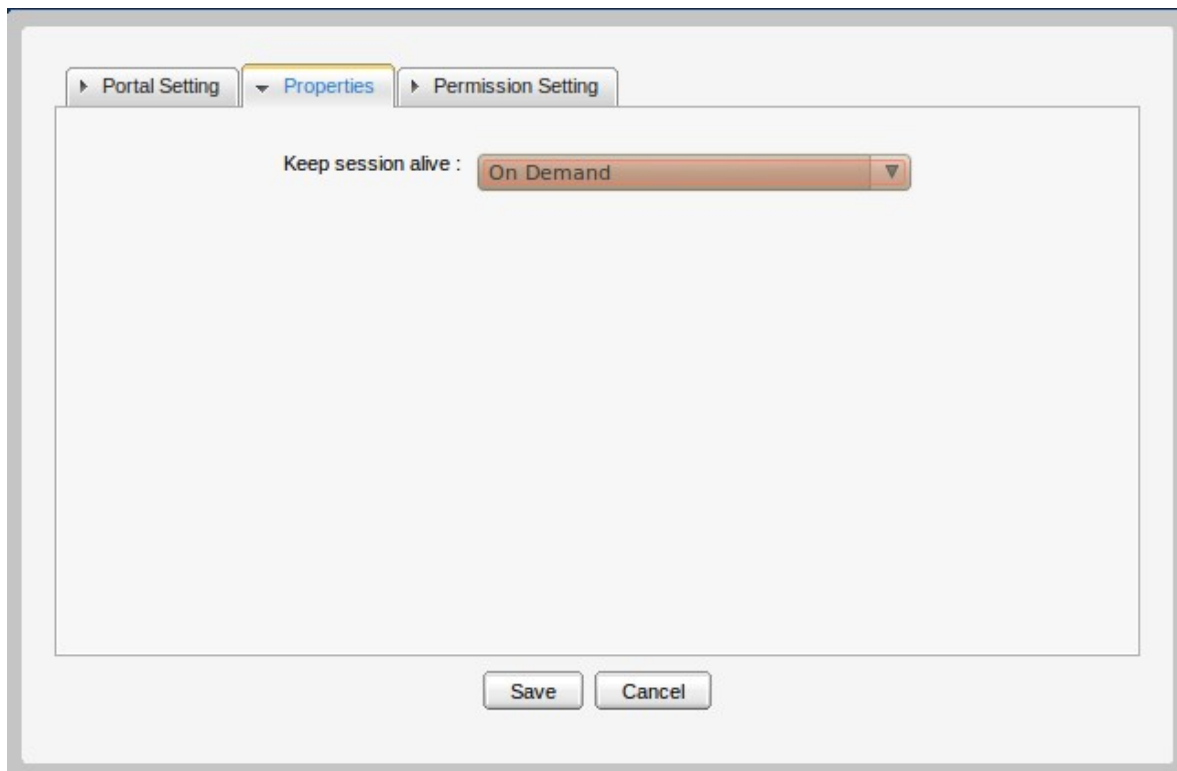


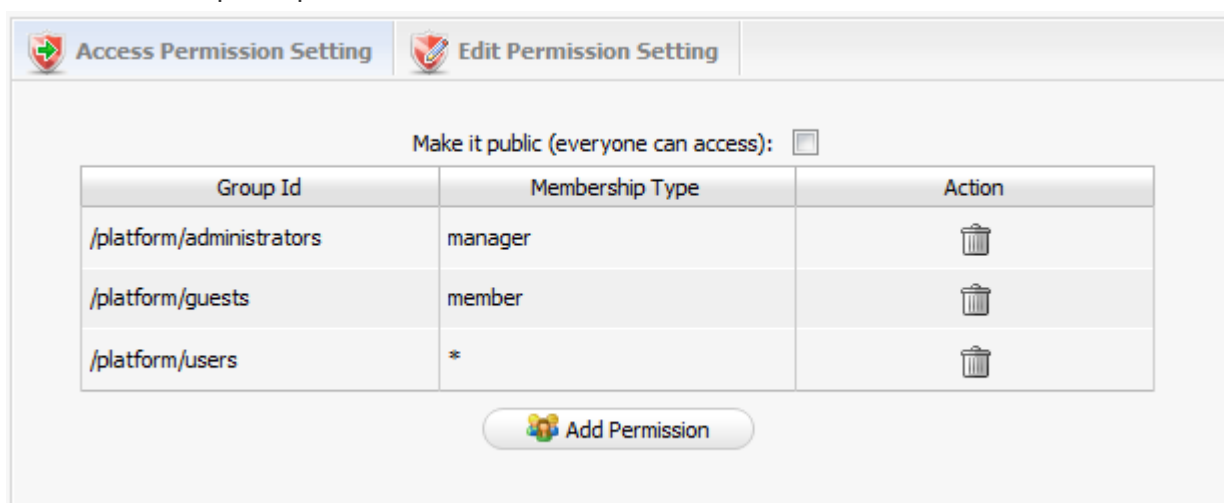
Illustration 29: The Properties tab

- By default, the access permission list for portal is empty. You have to select at least one or check **Make it public** to set access permission to everyone.
- Edit permission is also empty and you have to select one.

**Step 8:** Click **Save** to accept creating the new portal, or **Cancel** to quit.

#### 4.1.1.2 Access a portal



If you want to access a portal, you must be in the Access Permissions list of that portal.  
For example: a portal's Access Permission list:



To access this portal, a user must be a “manager” of group /platform/administrators or a

“member” of /platform/guests or a user in /platform/user with any membership type. To add more access rights, click the **Add Permission** button and then select the desired group and membership type.

There is a flexible option for you to choose if you want everyone can access the portal by just selecting **Make it public**. In this case, the detailed access permission list disappears:

 <b>Access Permission Setting</b>	 <b>Edit Permission Setting</b>
Make it public (everyone can access): <input checked="" type="checkbox"/>	

After setting the access permission for the portal, users who have access right can go into that portal in public mode by typing the public URL in browser (for example, <http://localhost:8080/portal> or [http://localhost:8080/portal/public/\[new-portal-name\]](http://localhost:8080/portal/public/[new-portal-name])). Furthermore, users can access to that portal in private mode by signing in the public mode. There is also a direct URL for the private mode: (for example, [http://localhost:8080/portal/private/\[new-portal-name\]](http://localhost:8080/portal/private/[new-portal-name])). Users who only have the access permission on the portal can view pages but they cannot change any information of that portal.

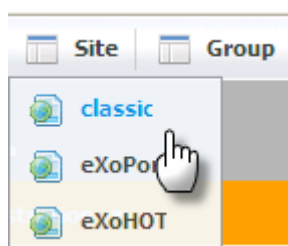
You can set access permissions for a portal when you create or edit it.

#### 4.1.1.3 Edit/Delete a portal

The function is to change information of the current portal, such as properties, or layouts.

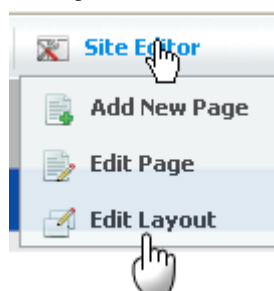
To do this, you must have the edit permission. Please contact your Administrator to get more permissions. When you have the edit permission, follow one of two ways below to edit the current portal:

**The 1<sup>st</sup> way:**




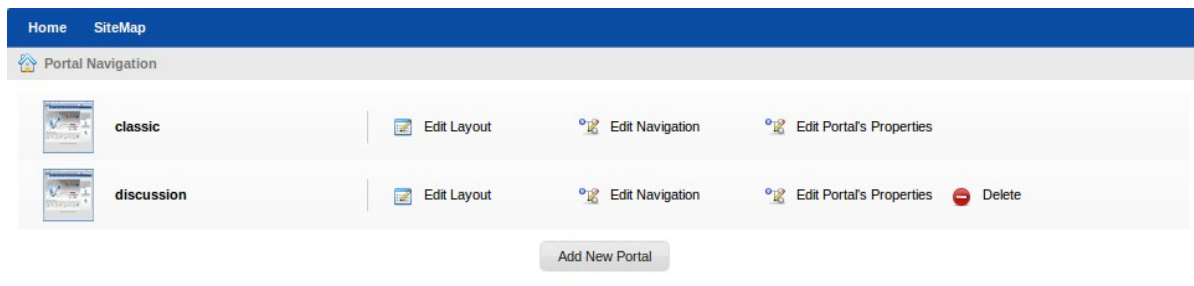
**Step 1:** Go to the portal that you want to edit.

**Step 2:** Go to **Site Editor | Edit Layout:**

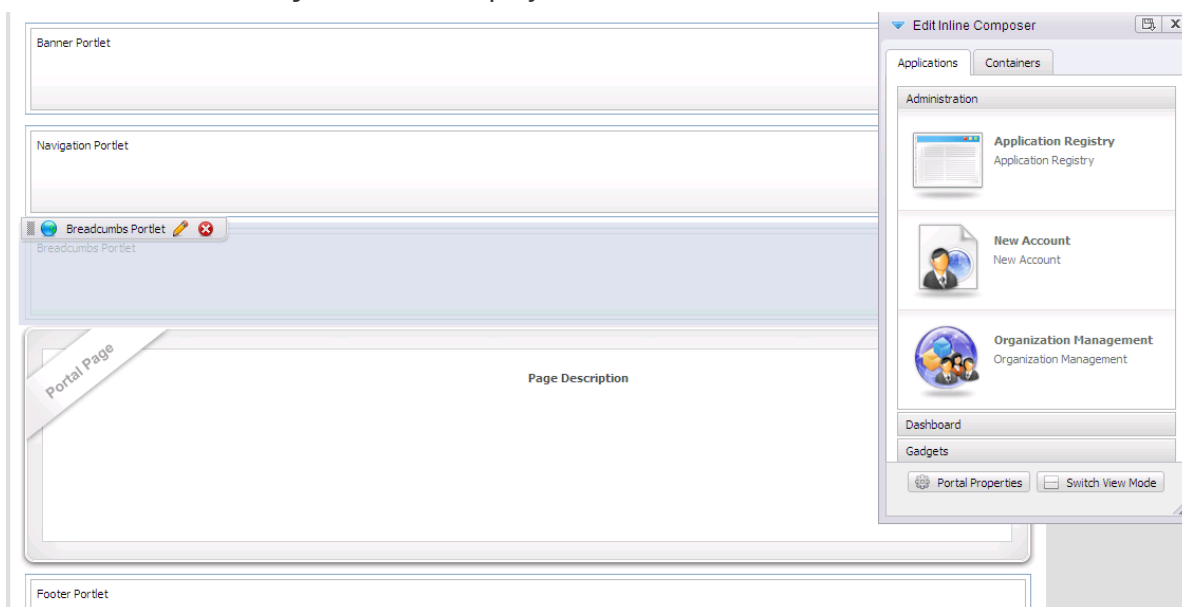


**The 2<sup>nd</sup> way:**

**Step 1:** Click **Site**, then click  **Edit Layout** that corresponds to the portal that users want to edit.



The **Edit Site Layout** will be displayed:




**Step 2:** Click  **Portal Properties** to edit portal properties.  
The form to edit the portal properties will appear:

Illustration 30: The Portal Setting tab of the portal properties form

**Step 3:** Change the properties of the current portal settings, properties or modify permissions:



For example: a portal's Edit Permission looks like:

It means any user of the *group /platform/administrators* can perform this action.


To change any permission, click **Select Permission**, then select a group with the Membership type you want. Only one group can have the **Edit Permission** on the portal.

You can set **Edit Permission** for the portal when you create or edit it.

**Step 4:** Click the **Containers** tab to edit the portal container layout by selecting, dragging and dropping it.

**Step 5:** Click the edit icon  to edit the portlet in the portal or the delete icon  to remove the existing portlet.

**Step 6:** Add other portlets by selecting, dragging and dropping from the **Applications** tab of the **Edit Inline Composer** form to the main pane.

**Step 7:** Click the Finish icon  to save changes.

## **Delete a portal**

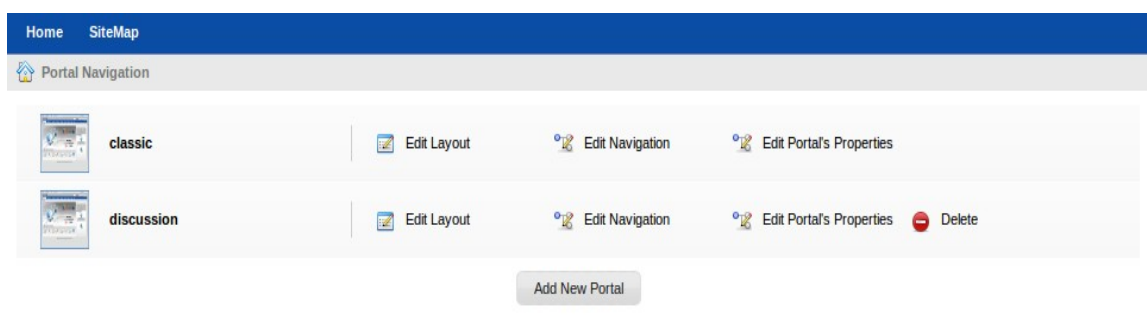
To delete a portal, users must be in the group that has the **Edit Permission** on that portal.

Follow these steps:

**Step 1:** Click **Site** on the administration toolbar.



The **Portal Navigation** page will appear with a list of all portals:



**Illustration 31: Portal Navigation**

**Step 2:** Click **Delete** that corresponds to the portal you want to delete.

**Step 3:** Click **OK** on the confirmation message box to accept deleting, or **Cancel** to quit.

**Note:** The default portals cannot be deleted by any user, including the administrator.

### **4.1.1.4 Access a specific portlet**

Portlets are used as content bricks of a page. For individual needs, users can compose their pages using any portlet that they have access permission. Some portlets are designed for administrators only, therefore you should restrain the access to these portlets.

Users, including administrators, only have access permissions to portlets other than edit permission. You can give access permission to any group.

Access Permissions

Make it public (everyone can access): ☐

Group	Membership	Action
/platform/administrators	*	
/organization/management	*	
/executive-board		

Add Permission

Illustration 32: The Access Permissions form

The access permission enables performing these followings:

1. When you create/edit a page by wizard, at step 3, all portlets under your access permission will be displayed in the **Applications** tab of the **Page Editor** form that is ready for you to drag and drop into the page area in the main pane.
  2. When you edit a node's page in Edit Page and Navigation, all portlets under your access permission will be displayed in the **Applications** tab of the **Page Editor** form that are ready for you to drag and drop into a page area in the main pane.
  3. When you edit a page in **Manage Pages**, all portlets under your access permission will be displayed in the **Applications** tab of the **Page Editor** form that are ready for you to drag and drop into page area in the main pane.
- When you edit the current portal, all portlets under your access right will be displayed in the **Applications** tab of the **Page Editor** form that are ready for you to drag and drop into the page area on the right pane.

#### 4.1.1.5 Edit a specific portlet

This section tells you how to access the edit mode of a portlet and edit it.

**Step 1:** Create or edit a page by following above steps. In this step, there is a container that contains and arranges portlets as contents of that page. You can add a portlet into that page by dragging it from the left pane and dropping it into this container space.

**Step 2:** Open the form to edit a portlet by clicking the edit portlet icon at the upper left corner of that portlet:

New Account

Account Portlet

Edit Portlet

**Step 3:** Enter new values that you want to edit in this form, then click the **Save** button to save new values:



The screenshot shows a web-based configuration window for a portlet. At the top, there are four tabs: 'Portlet Setting' (which is active and highlighted in blue), 'Select Icon', 'Decoration Themes', and 'Access Permission'. The main content area contains the following fields and controls:

- Display Name:** Account Portlet
- Portlet Title:** A text input field containing 'New Account'.
- Width:** An empty text input field.
- Height:** An empty text input field.
- Show Info Bar:** A checkbox that is checked.
- Show Portlet Mode:** A checkbox that is checked.
- Show Window State:** A checkbox that is checked.
- Description:** A text area containing 'New Account'.

At the bottom of the window, there are two buttons: 'Save And Close' and 'Cancel'.

**Illustration 33: The Portlet Setting tab**

Normally, a portlet has 4 components: the **Portlet Setting** tab, the **Select Icon** tab, the **Decoration Themes** tab and the **Access Permission** tab. In addition, some portlets may also have a **Edit Mode** tab or a **Preferences** tab. The administrator can change the interface of a portlet by changing values in the **Edit Mode** tab or in the **Preferences** Tab.

The **Portlet Setting** tab includes:

<b>Display Name:</b>	The display portlet name
<b>Portlet Title:</b>	The portlet title. The length must be between 3 and 30 characters.
<b>Width:</b>	The portlet's vertical size. The value of this field must be in numeric format. This field is not required.
<b>Height:</b>	The portlet's horizontal size. The value of this field must be in numeric format. This field is not required .
<b>Show Info Bar:</b>	The option allows showing or hiding the information bar.
<b>Show Portlet Mode:</b>	The option allows whether showing the portlet mode or not.
<b>Show Window State:</b>	The option allows whether showing the portlet's window state or not.
<b>Description:</b>	The brief information about the portlet. The length must be between 0 and 255 characters.

**Note:** If Show Info Bar is not checked, portlet mode and window state will not be displayed in that portlet.

The **Select Icon** tab enables you to select an icon for the portlet. By clicking **Get Default**, you donot have to choose any icon from the list, it will be automatically gotten the suitable icon.

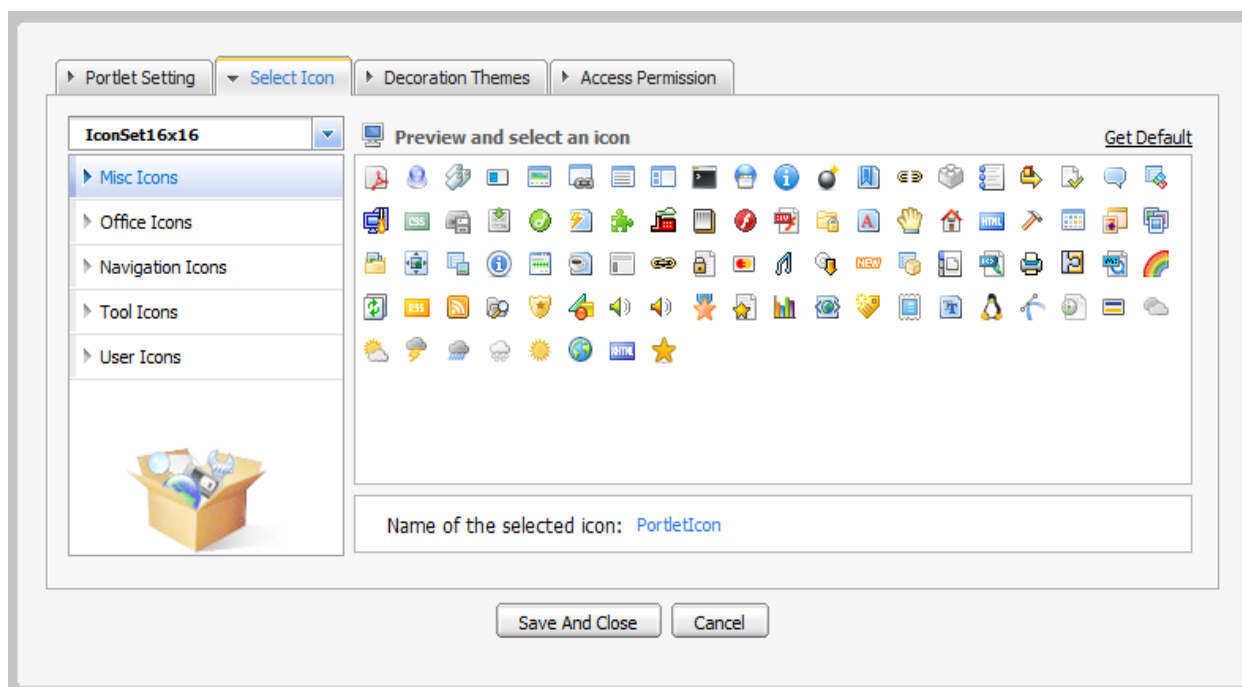


Illustration 34: The Portlet Icon tab

- The **Decoration Themes** tab enables you to select a theme for the portlet from a theme list. By clicking **Get Default**, you do not have to choose any theme, it will be automatically set:

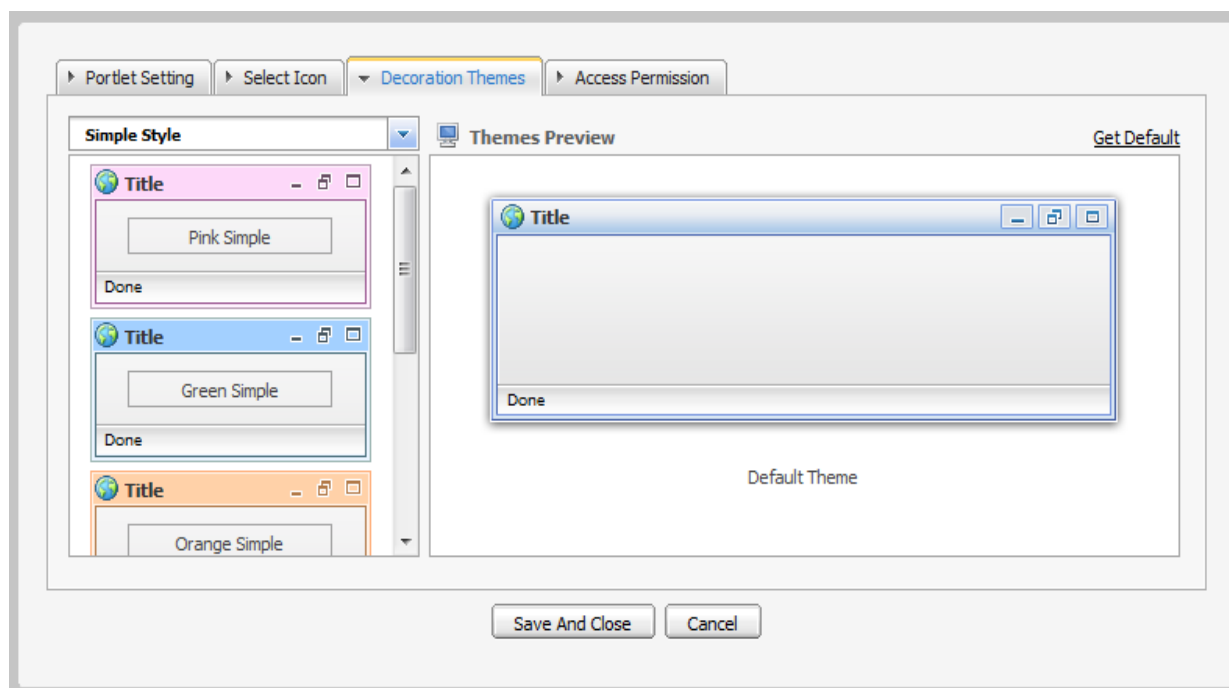


Illustration 35: The Decoration Themes tab

- The **Access Permission** tab enables you to set access permission on the portlet. The portlet can be made public to everyone or restricted to specific groups. To allow more groups to have access permission, simply click **Add Permission** to select more groups.

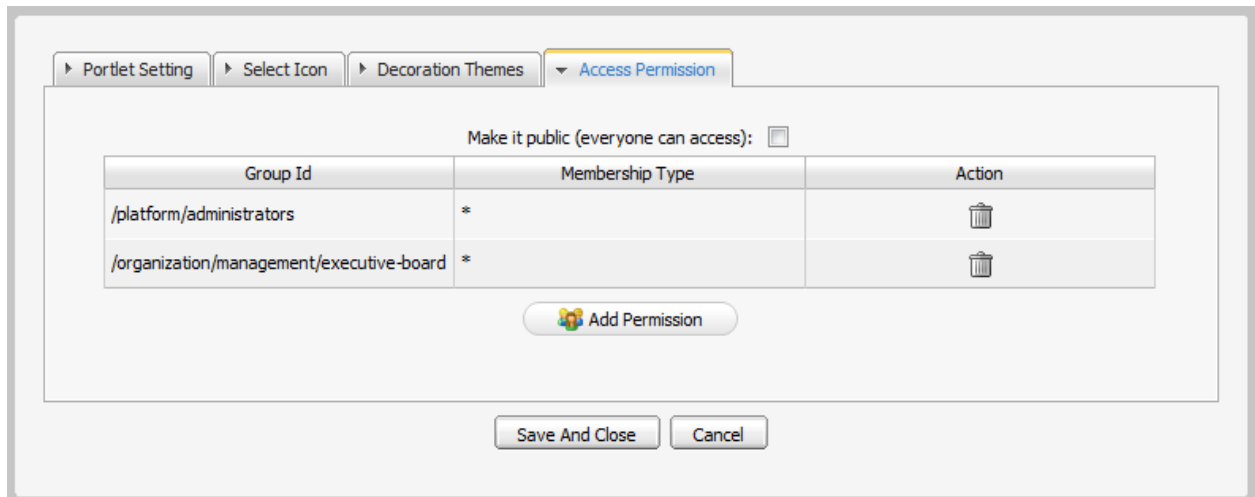


Illustration 36: The Access Permission Tab

- Some portlets have a **Edit Mode** and **Preferences** tab:  
*Example:*
  - IFrame and Dashboard portlets have the **Edit Mode**, the administrator can define the interface details in the **Edit Mode** tab:

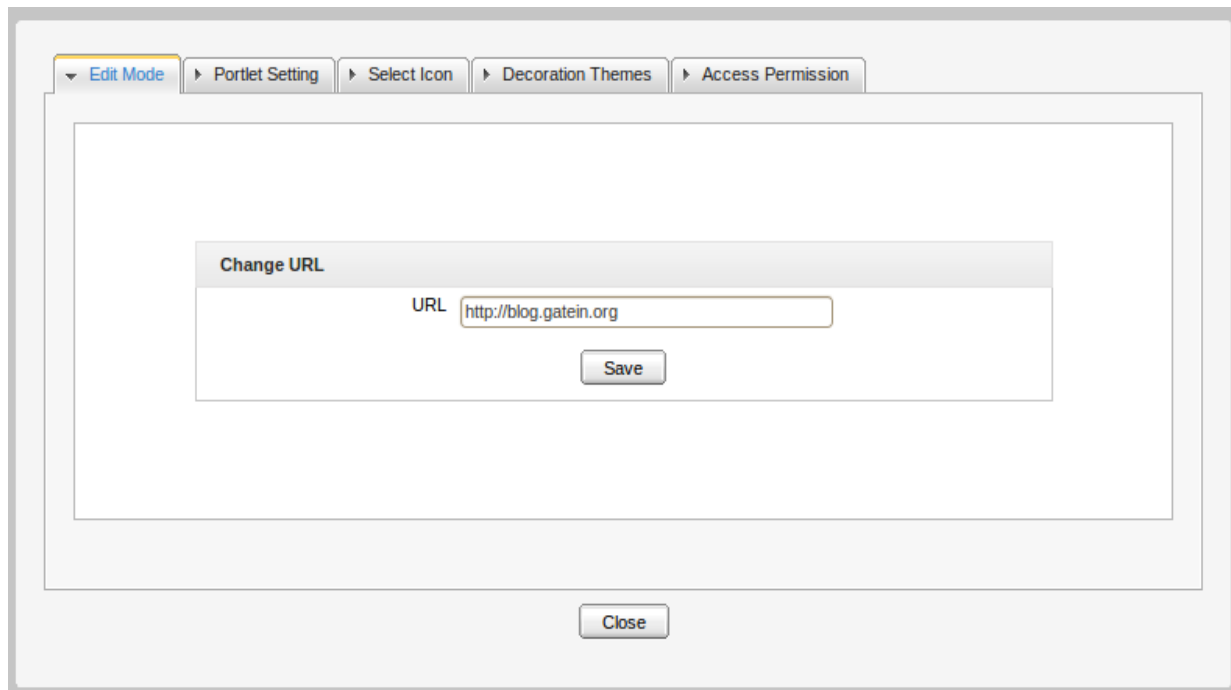


Illustration 37: The Edit Mode tab of the IFrame Portlet

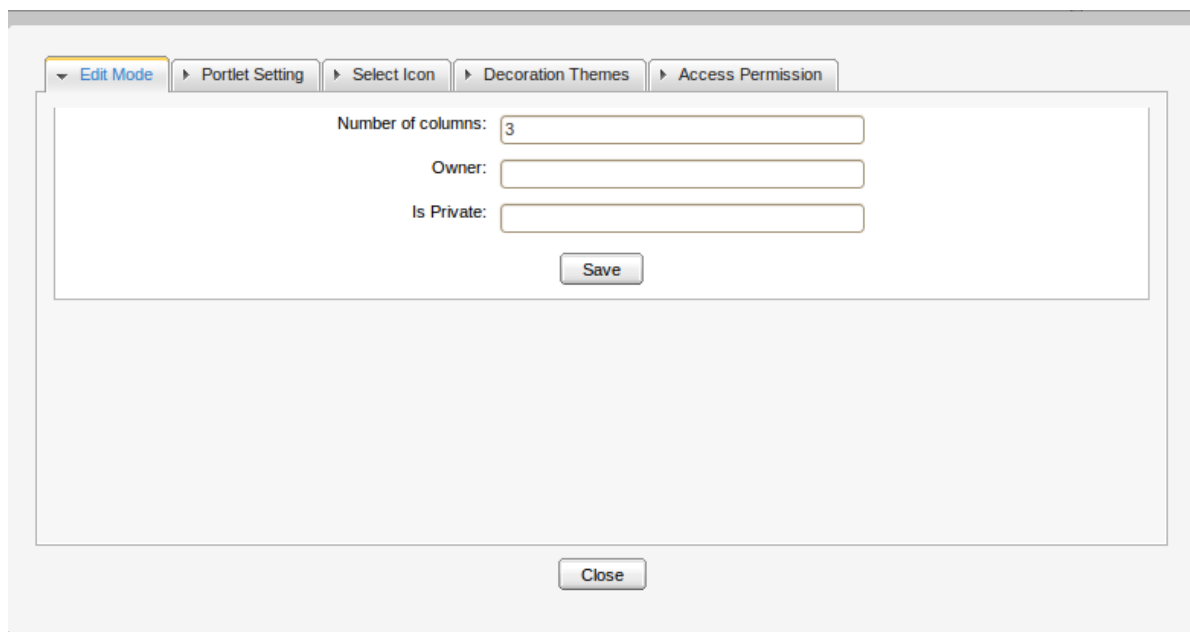


Illustration 38: The Edit Mode of the Dashboard Portlet

#### 4.1.1.6 Edit portal's navigation

The function enables you to edit the navigation of portal.

Do as follows:



**Step 1:** Click **Site** on the toolbar:

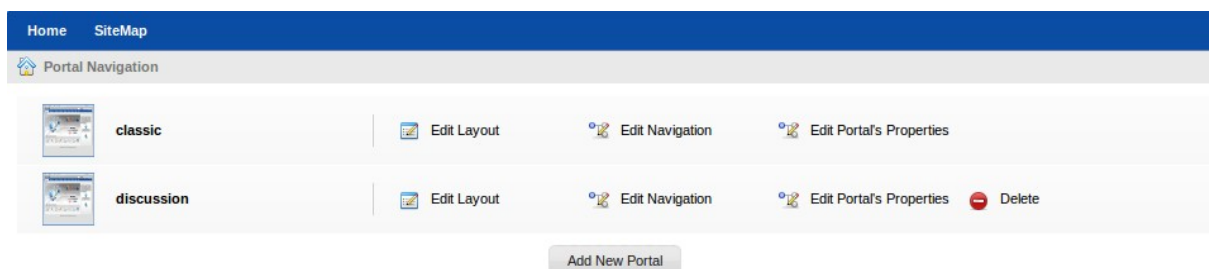
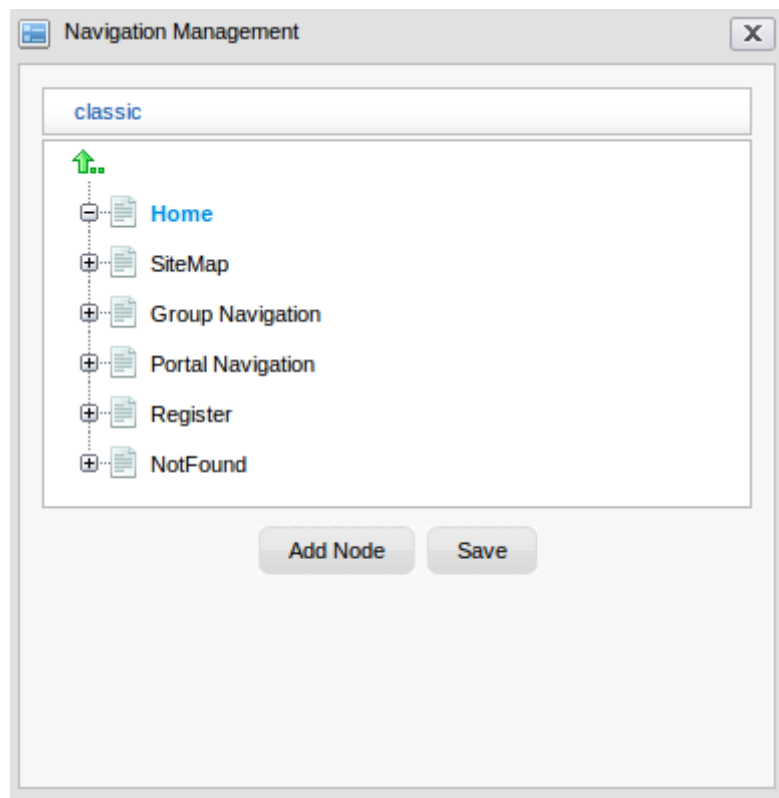


Illustration 39: Portal Navigation

The **Portal Navigation** page will appear with a list of all portals:

**Step 2:** Click the **Edit Navigation** link that corresponds to the portal you want to edit. The **Navigation Management** form will be displayed:



**Step 3:** Select the navigation that you want to edit.

**Step 4:** Click **Add Node** to add or change the node for a specific navigation.

**Step 5:** Click **Save** to accept changes.

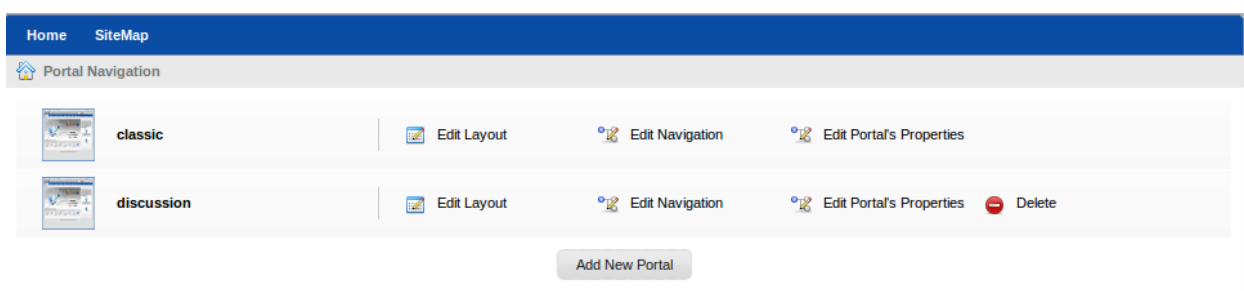
#### 4.1.1.7 Edit portal's properties

Portal properties such as language, skin and permissions can be set by following these steps:

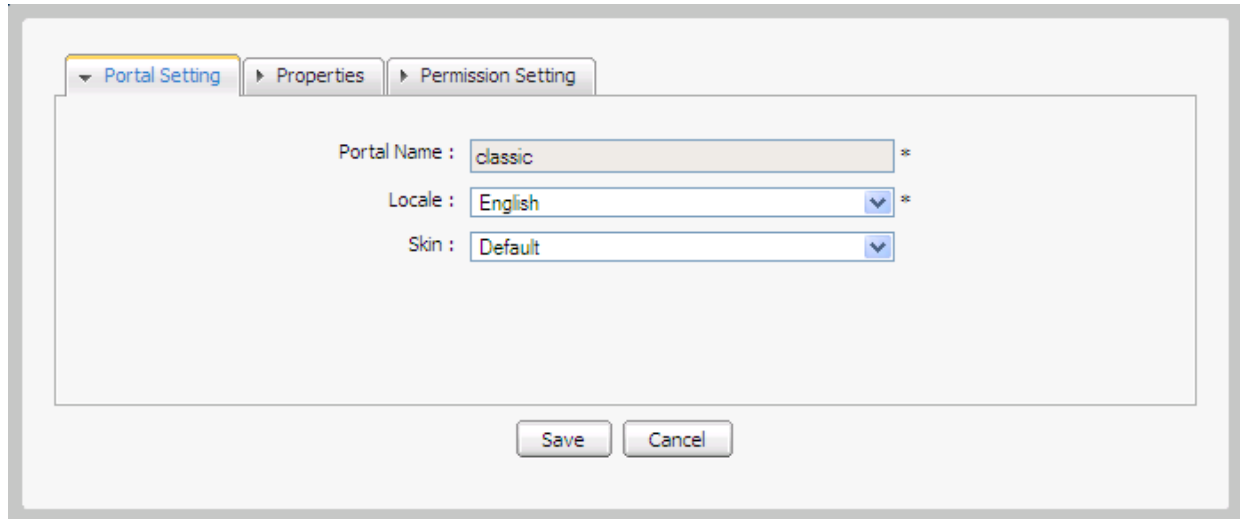


**Step 1:** Click **Site** on the toolbar:

The **Portal Navigation** page will appear with a list of all portals:



**Step 2:** Click **Edit Portal's Properties** corresponding to the portal that you want to edit. The form used to edit portal's properties will be displayed below.



**Step 3:** Make changes in the Portal properties form.

**Step 4:** Click **Save** to accept the changes, or **Cancel** to discard any change.


#### 4.1.1.8 Change portal skin


GateIn skins are graphic styles that help displaying attractive user interfaces. Each skin has its own characteristics with different backgrounds, icons, and other visual elements, etc. In order to be user-friendly and flexible in use, users are allowed to change skin without editing the portal right.

The skins can be changed permanently or temporarily.

##### Change the skin permanently

**Step 1:** Click **Site** on the toolbar and select the portal that you want to edit.

**Step 2:** Click  **Edit Layout** which corresponds to the portal that you want to edit. The portal will be displayed under the edit mode.

**Step 3:** Click  **Portal Properties** to edit portal properties.

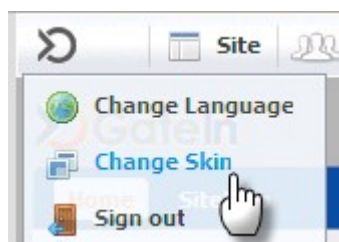
**Step 4:** Select one skin type in the **Skin** lists field to change in the **Portal Setting** tab. Currently, there are two supported types, including **Default** and **SimpleSkin**.

**Step 5:** Click **Save** and select  to take affect.

**Note:** The display skin which is changed by this way will be kept permanently till you change the skin when you edit the current portal again.

##### Change the skin temporarily

**Step 1:** Mouser over the **Star** menu and click **Change Skin**.



The **Skin Setting** form is displayed with a list of all supported skins. The left pane contains the skin list and the right pane is used to display the selected skin's template.

**Step 2:** Select one by clicking the skin type in the combo box. Currently, GateIn 3.1 supports two skin types, including **Default** and **SimpleSkin**.

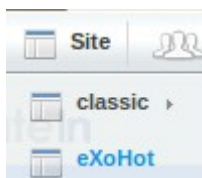
**Step 3:** Click **Apply** and wait for a few seconds to take effect.

**Note:** Changing the skin by this way only takes effect on the current session. The next time you sign in, it will return to the portal default skin.

#### 4.1.1.9 Switch between portals

This function enables users to select and use another portal (gateway, starting site). Only the users who got the appropriate permission by the administrators can perform this action.

To switch between portals, simply click **Site** on the administration tool bar and click the portal name you want to switch.



### 4.1.2 Manage nodes

If you are the portal administrator or the portal administrator has granted you the appropriate permission privileges, you can execute some special actions related to portal nodes, including copying, editing, cutting, cloning, deleting, adding existing nodes.


#### 4.1.2.1 Add a new node

Follow these steps:

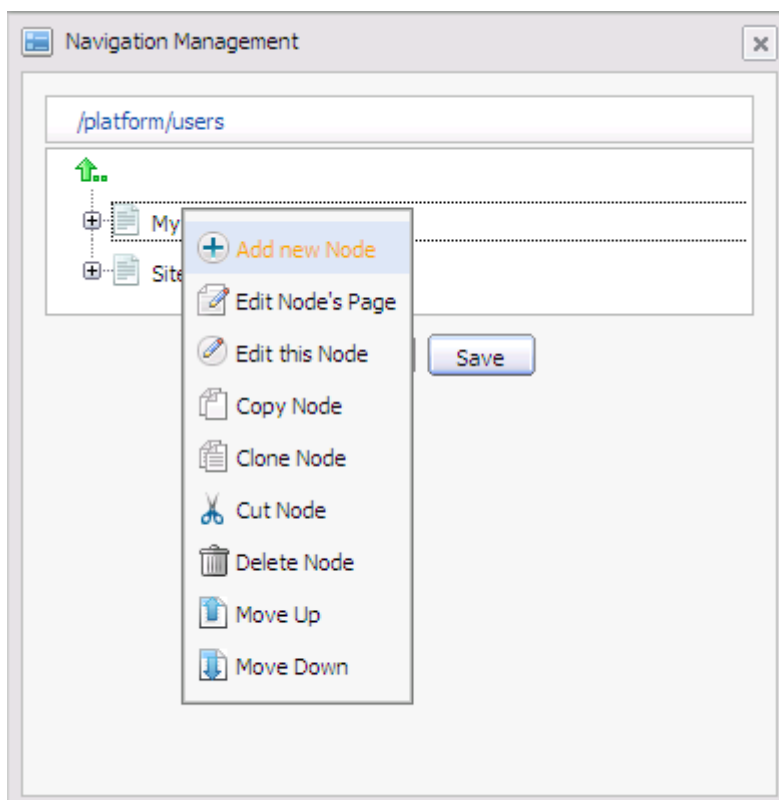
**Step 1:** Click **Site** on the toolbar. The **Portal Navigation** will be displayed.

**Step 2:** Click **Edit Navigation** that corresponds to the portal you want to add a new node.

**Step 3:** Select a navigation from the navigation list.

**Step 4:** Select a node from the list to create a node as a sub-node of the selected node or click the arrow up icon  to create a new node at the root level of the portal.

**Step 5:** Right-click the selected navigation or node and select **Add new Node**.



The **Add new node** form appears:

The screenshot shows a window titled "ADD/EDIT PAGE NODE" with a close button (X) in the top right. It has three tabs: "Page Node Setting" (selected), "Page Selector", and "Icon". The "Page Node Setting" tab contains the following fields and controls:

- Uri:
- Node Name:  \*
- Label:
- Visible: ☒
- Publication date & time: ☒
- Start Publication Date:
- End Publication Date:

At the bottom are "Save" and "Back" buttons.

**Illustration 40: The Page Node Setting tab of the Add/Edit Page Node form**

Details:

The **Page Node Setting** tab includes:

**Uri:**

The node's identification. The Uri is automatically created once a new node has been created.

**Node Name:**

The node name which must be unique. Only alphabetic, numeric and underscore characters are allowed and it must contain at least 3 characters.



**Label:** The node's display name on the screen. This field may be changed and its length must be between 3 and 60 characters.

**Visible:** This checkbox allows the page and its node to be shown or hidden at the navigation bar, the page navigation bar and the sitemap. See above for more details.

**Publication date & time:** This option enables this node to be published for a period of time. Two fields, including '**Start Publication Date**' and '**End Publication Date**' only display when this option is checked.

**Start Publication Date:** The start date and time to publish the node.

**End Publication Date:** The end date and time to publish the node.

In the **Page Selector** tab, you can select a page or not for this node.

**Illustration 41: The Page Selector tab of the Add Page Node form**

Details:

**Page Id:** The identification string of the page.

**Name:** The selected page's name.

**Title:** The selected page's title.

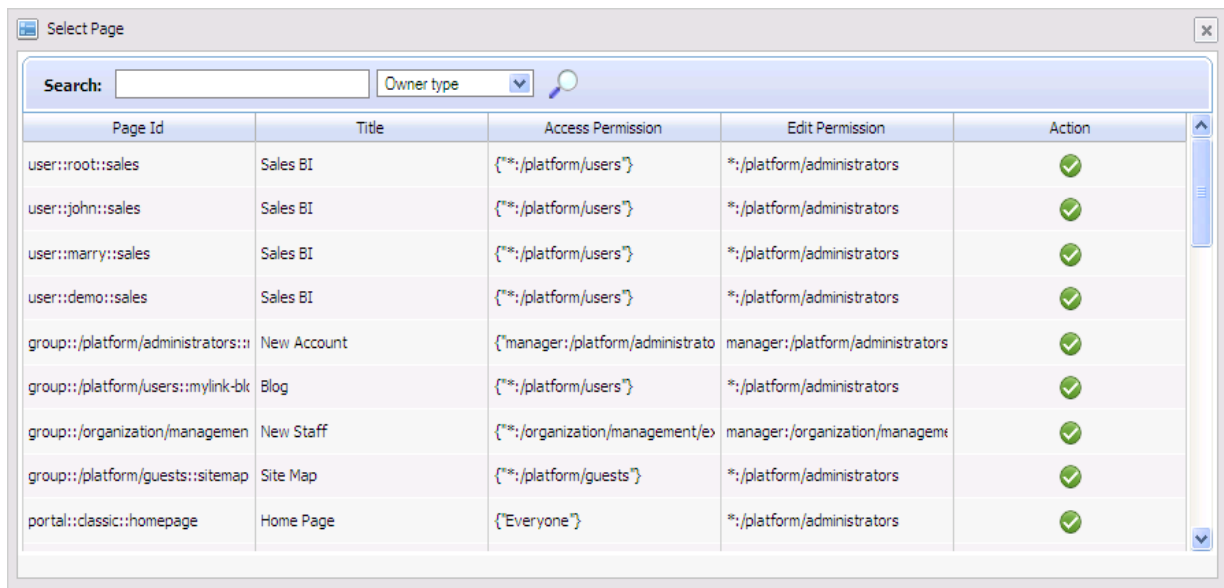
**Clear Page:** This is to remove the inputted page information in the fields

**Create Page:** This is to create a new page with the inputted name and the title.

**Search and Select Page:** This is to search and select an existing page.

You donot have to input values in these fields. They are automatically displayed after you have selected an exiting page by clicking **Select and Select Page**.

The **Select a page** form appears:

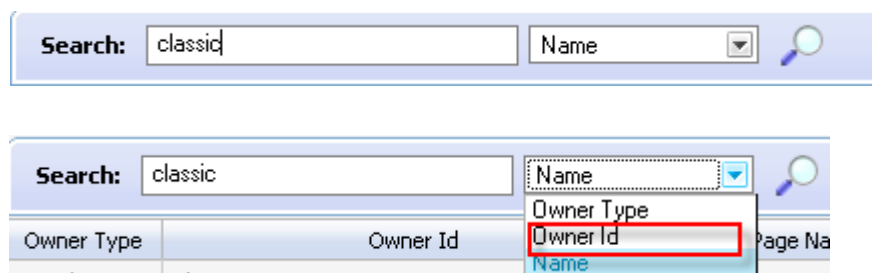


Page Id	Title	Access Permission	Edit Permission	Action
user::root::sales	Sales BI	{"/platform/users"}	*/platform/administrators	✓
user::john::sales	Sales BI	{"/platform/users"}	*/platform/administrators	✓
user::marry::sales	Sales BI	{"/platform/users"}	*/platform/administrators	✓
user::demo::sales	Sales BI	{"/platform/users"}	*/platform/administrators	✓
group::/platform/administrators::	New Account	{manager:/platform/administrato	manager:/platform/administrators	✓
group::/platform/users::mylink-blk	Blog	{"/platform/users"}	*/platform/administrators	✓
group::/organization/managemen	New Staff	{"/organization/management/e	manager:/organization/managemen	✓
group::/platform/guests::sitemap	Site Map	{"/platform/guests"}	*/platform/administrators	✓
portal::classic::homepage	Home Page	{Everyone}	*/platform/administrators	✓

**Illustration 42: The Select Page form**

The list of all existing pages is displayed with basic information. To select a page for creating a node, do as follows:

**Step 1:** Select a page from the list or search a specific page.





Search: classic Name [v]

Owner Type Owner Id Owner Id Name

**Step 2:** Enter a search term related to the page that you want to search.

**Step 3:** Choose the field you wish to search in:

**Step 4:** Click the magnifying icon  to perform the search. All pages matching with the search term will be listed.

**Step 5:** Click the icon  on the row of the desired page.

After selecting a page, the details of this page will be displayed in the **Page Selector** form.

**Note:**

*To select a page, you must be a member in the Access Permission or Edit Permission list of the selected pages. When the page type is 'User', you can not select a page of another users. If you do not have the access permission for any page in the list, please contact your administrator to get appropriate permissions.*

**Step 6:** Choose one icon in the **Icon** tab.

**Step 7:** Click **Save** to accept the new node page, or **X** to close the form.

#### 4.1.2.2 Edit a node

This function is used to edit the node setting and re-select a page for a node.

Follow these steps:

**Step 1:** Click **Site** on the toolbar. The **Portal Navigation** will be displayed.

**Step 2:** Click **Edit Navigation** of the portal you want to modify.

**Step 3:** Right-click the selected node and select **Edit this Node** in the menu.

The **Editing Node** form appears with all fields as you saw it when you create a node, the current node's details are displayed in a form.

**Step 4:** Change values in fields of the current node. Note that the node name can not be changed.

**Step 5:** Click **Save** to complete changing or **X** to quit.

#### 4.1.2.3 Copy/Paste a node

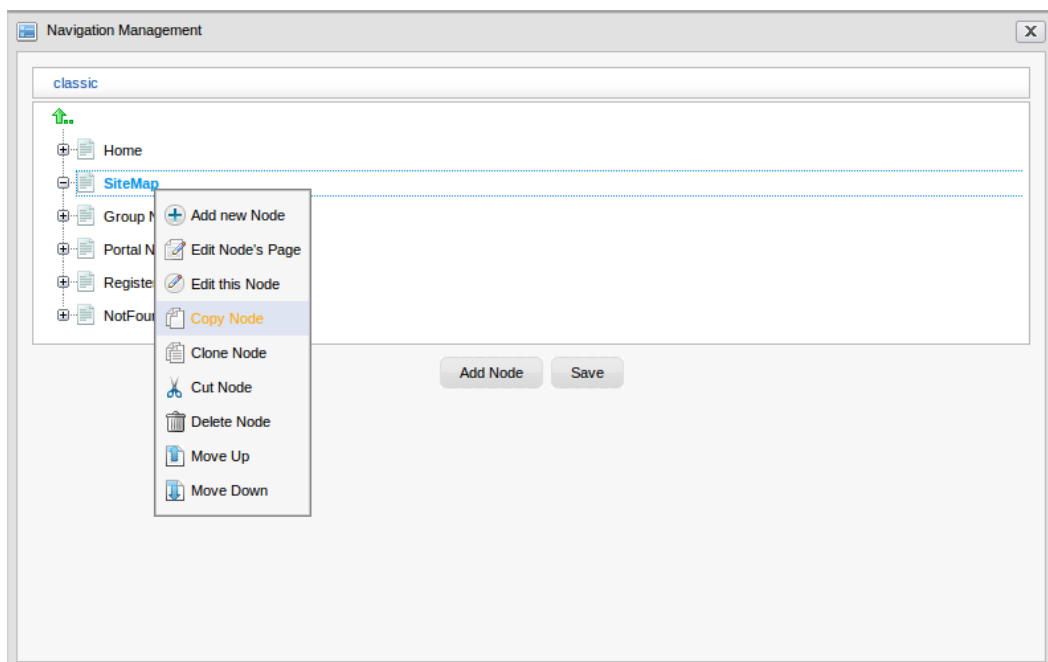
These functions are used to reproduce a node to another place.

Do as follows:

**Step 1:** Click **Site** on the toolbar. The **Portal Navigation** will be displayed.

**Step 2:** Click **Edit Navigation** of the portal you want to modify.

**Step 3:** Right-click the selected node and select **Copy Node** in the menu.



**Step 4:** Select the position you want to paste this node and select **Paste Node**.

The node selected at step 3 will be reproduced in a new place.

**Step 5:** Click **Save** to make change.

**Note:** Existing two same node names in the same place is not allowed.

#### 4.1.2.4 Clone a node

This function allows you to make a node copy. The difference between clone node and copy node is that the clone node has its own page with the same content as the selected node. Therefore, there will be a new page that has the same name as the cloned node's page shown in the page list when you access **Manage Pages**.

Do as follows:

- Step 1:** Click **Site** on the toolbar. The **Portal Navigation** will be displayed.
- Step 2:** Click **Edit Navigation** of the portal you want to modify.
- Step 3:** Right-click the selected node and select **Clone Node** in the menu.
- Step 4:** Select the position you want to paste this node and select **Paste Node**.  
The node cloned at step 3 will be reproduced in a new place.
- Step 5:** Click **Save** to make change.

#### 4.1.2.5 Cut a node

This function allows users to change the position on a specific node (like changing the page path).

Follow these steps:

- Step 1:** Click **Site** on the toolbar. The **Portal Navigation** will be displayed.
- Step 2:** Click **Edit Navigation** of the portal you want to modify.
- Step 3:** Right-click the selected node and select **Cut Node** in the menu.
- Step 4:** Select the position you want to paste this node and select **Paste Node**.  
The node cut at step 3 will be moved to the new position.
- Step 5:** Click **Save** to make change.  
The node at step 3 is moved to a new place.

**Note:** It is not allowed for two same node names to exist in the same path (node).  
Four navigations, including Group Navigation, Portal Navigation, Register, and NotFound can not be cut, including administrators. Also, the above system nodes which have been copied, or cloned can not be cut in the new position. However, you can cut them through cutting the node which contains them, excluding the system nodes.

#### 4.1.2.6 Delete a node

The function is used to remove a node (link to page).

Follow these steps:

- Step 1:** Click **Site** on the toolbar. The **Portal Navigation** will be displayed.
- Step 2:** Click **Edit Navigation** of the portal you want to modify.
- Step 3:** Right-click the selected node and select **Delete Node** in the menu.
- Step 4:** Click the **Ok** to accept the deletion or **Cancel** to discard.
- Step 5:** Click the **Save** to make change.  
A confirmation message will be displayed.
- Step 6:** Click **OK** to confirm deleting or **Cancel** to quit.

**Note:** When you delete a node, you delete the link to page but the page still exists. Four navigations, including Group Navigation, Portal Navigation, Register, and NotFound can not be deleted by any users, including administrators. Also, the above system nodes which have been copied, or cloned can not be deleted in the new position. However, you can delete them through deleting the node which contains them, excluding the system nodes.

#### 4.1.2.7 Change nodes order

This function is used to change the position of a node up/ down.

Follow these steps:

- Step 1:** Click **Site** on the toolbar. The **Portal Navigation** will be displayed.
- Step 2:** Click **Edit Navigation** of the portal you want to modify.
- Step 3:** Right-click the selected node and select **Move Up** or **Move Down** in the menu.  
The selected node will be moved up/down.
- Step 5:** Click **Save** to make change.

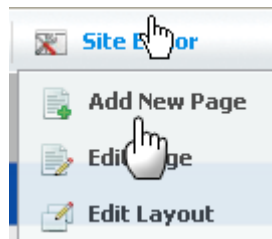
## 4.1.3 Manage pages

### 4.1.3.1 Create a new page

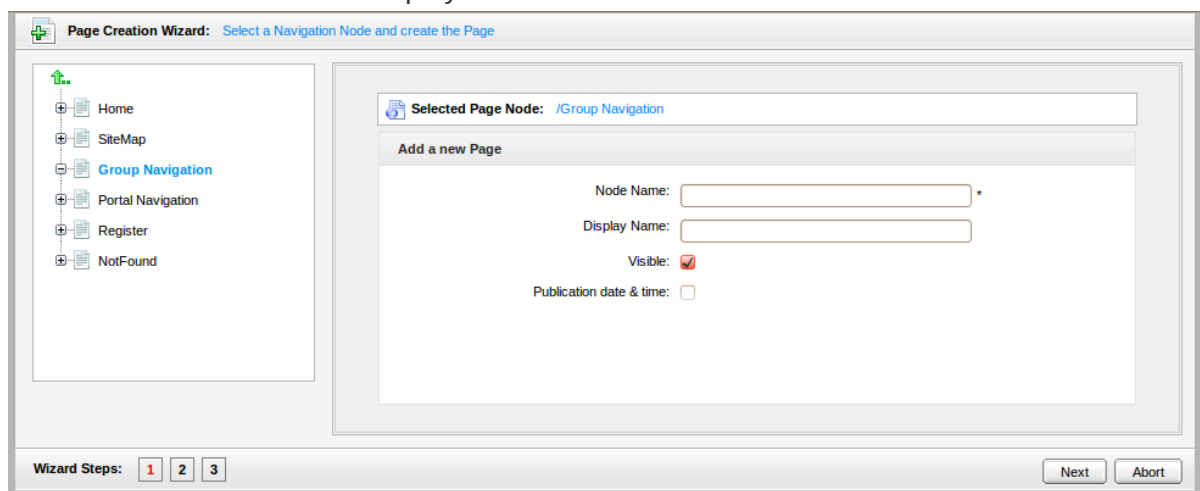
#### Create a new page using Page Creation Wizard

A page creation wizard is available to the portal's administrators that facilitates them to create and publish portal pages quickly and easily. To do so, follow these steps:

**Step 1: Go to Site Editor | Add New Page.**



The wizard will be displayed below:



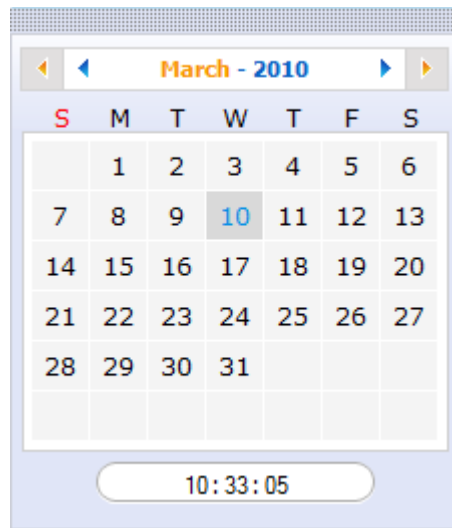
**Illustration 43: Page Creation Wizard: Select a Navigation Node and create the Page**

The **Page Creation Wizard** is divided into two sections: the left pane contains the existing pages and the right pane displays the **Page Editor**.

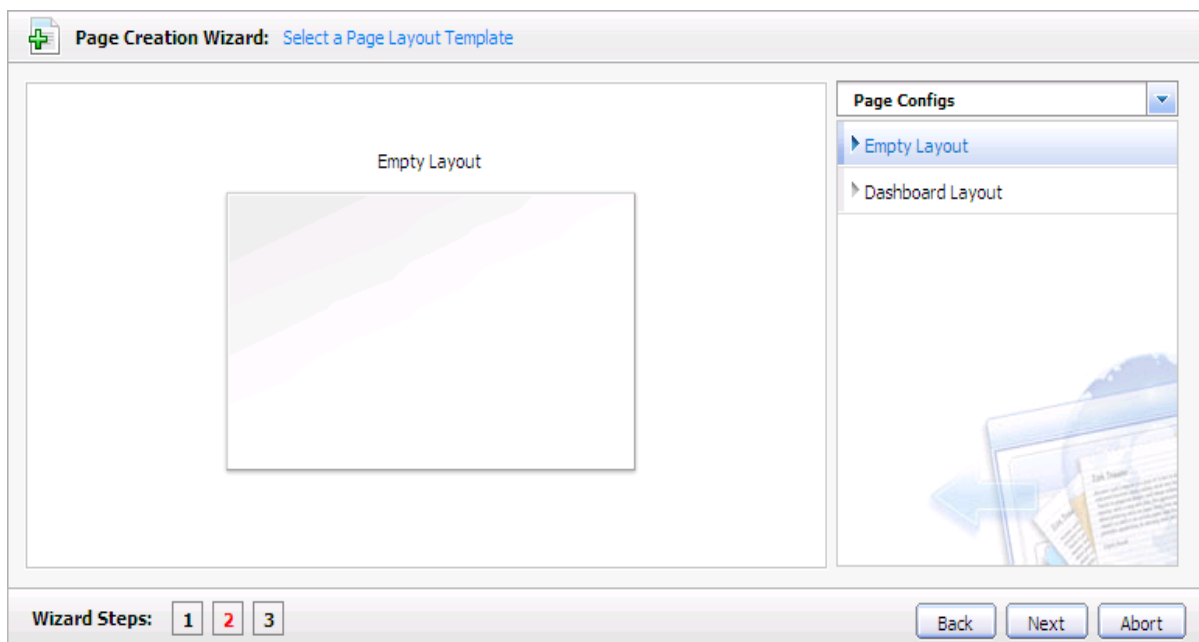
- The left pane is to navigate up and down the node/page structure.
- The right pane is to put parameters for a new page, in which:

<b>Selected Page Node:</b>	The path of the selected node to add a new sub page.
<b>Node name:</b>	The node name of the added page. This field must start with a character and have length between 3 and 30 characters (required).
<b>Display name:</b>	The display name of the node which contains the added page and must have length between 3 and 30 characters.
<b>Visible:</b>	This checkbox allows this page (node) on the Navigation bar, Page Navigation and Site Map to be shown or not. By default, the checkbox is checked and it means that this page is shown in <b>Navigation, Page Navigation and Sitemap</b> . If "visible" is checked, the visibility will depend on the "publication date and time" option.
<b>Publication date &amp; time:</b>	This option allows the page to be published for a period of time. If this option is checked, the visibility of a page will depend on the publication period start and end date.
<b>Start Publication Date:</b>	The start date and time to publish the page.

**End Publication Date:** The end date and time to publish the page.  
**Note:** You can set date and time by clicking the **Start Publication Date** field and the **End Publication Date** field and select a date in a calendar pop up



**Step 2:** Enter values in fields.



**Illustration 44: Page Creation Wizard: Step 2- Setting a Page Layout Template**  
**Step 3:** Click **Next** or number '2' of the wizard steps to go to **step 2**.

**Step 4:** Select **Empty Layout** or click the icon  to see more templates.



**Illustration 45: The Page configurations type**

**Step 5:** Click **Next** or number '3' of the wizard step to go to step 3.

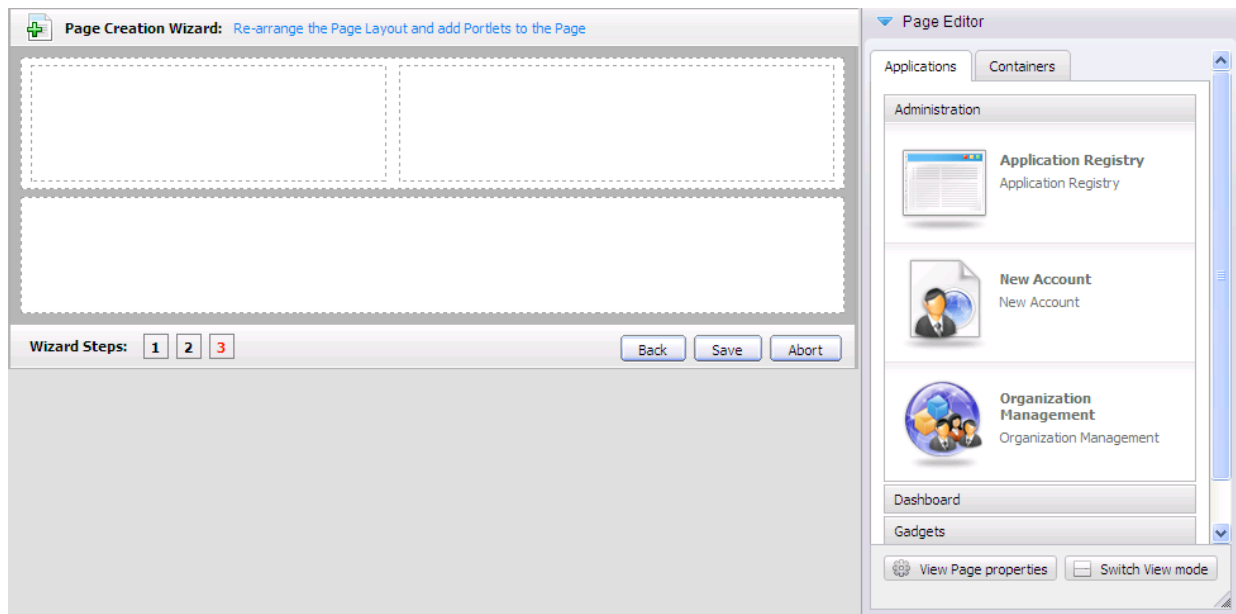


Illustration 46: Re-arrange Page Layout and add portlets into the page

The **Applications** tab lists all the categories and their portlets that you can drag and drop in your page area.

The **Containers** tab lists the existing containers to re-select the page layout.

- Add a container into the page area by dragging and dropping the container from user's workspace into the page's area.
- With each selected container, you can:
  - Change the position by pressing icon at the left-top corner of a container, then drag and drop the container to a new position.
  - Edit the selected container by clicking the edit icon; or
  - Delete the selected container by clicking the deletion icon.

**Step 6:** Click **Save** to complete the page's creation, or **Abort** to discard.

### Create a new page using Page Management

**Step 1:** Go to **Group** on the toolbar, highlight **Administration**, then select **Page Management**.

The **Manage Page** form appears:



Administration ▾

Search:  Owner type: ▾ 🔍

Page Id	Title	Access Permission	Edit Permission	Action
user::root::sales	Sales BI	{"/platform/users"}	*/platform/administrators	
user::john::sales	Sales BI	{"/platform/users"}	*/platform/administrators	
user::marry::sales	Sales BI	{"/platform/users"}	*/platform/administrators	
user::demo::sales	Sales BI	{"/platform/users"}	*/platform/administrators	
group::/platform/administrators::new	New Account	{"/platform/administrators"}	manager:/platform/administrators	
group::/platform/users::mylink-blog	Blog	{"/platform/users"}	*/platform/administrators	
group::/organization/management/ex	New Staff	{"/organization/management/execu	manager:/organization/management/	
group::/platform/guests::sitemap	Site Map	{"/platform/guests"}	*/platform/administrators	
portal::classic::homepage	Home Page	{"/Everyone"}	*/platform/administrators	

**Illustration 47: The Manage pages form**

**Step 2: Click Add New Page.**

▾ Page Setting    ▶ Page Layout

Page Id :

Owner type:

Owner Id:

Page name:  \*

Page title :

Show Max Window : ☐

**Step 3: Enter values for the Page Setting tab.**

Details:

- Page Id:** The page's identification string. It is automatically generated when you finish creating the page.
- Owner type:** If the page's **Owner type** is portal, the page is created for a portal. Therefore, only users who have edit permissions at the portal level can create this page type.  
The name of the current portal is automatically selected for **Owner id**, ensuring that the edit permissions are assigned to users who can edit the current portal.  
If the page's **Owner type** is group, the page is created for a group. As a result, only users who have manage permissions for that group can create this page type.
- Owner Id:** The identification name of the page's owner. When the owner type is "group", there will be a list of groups of which you have to select one.
- Page Name:** The page name. This field is required and must be unique. Only alphabetic, numeric and underscore characters are allowed and its length must be between 3 and 30 characters.
- Page title:** The page title. This field is optional and must have the length between 3 and 30 characters.
- Show Max Window:** The option allows whether the page is shown at maximum size or not.
- The **Page Layout** tab enables defining the page layout:

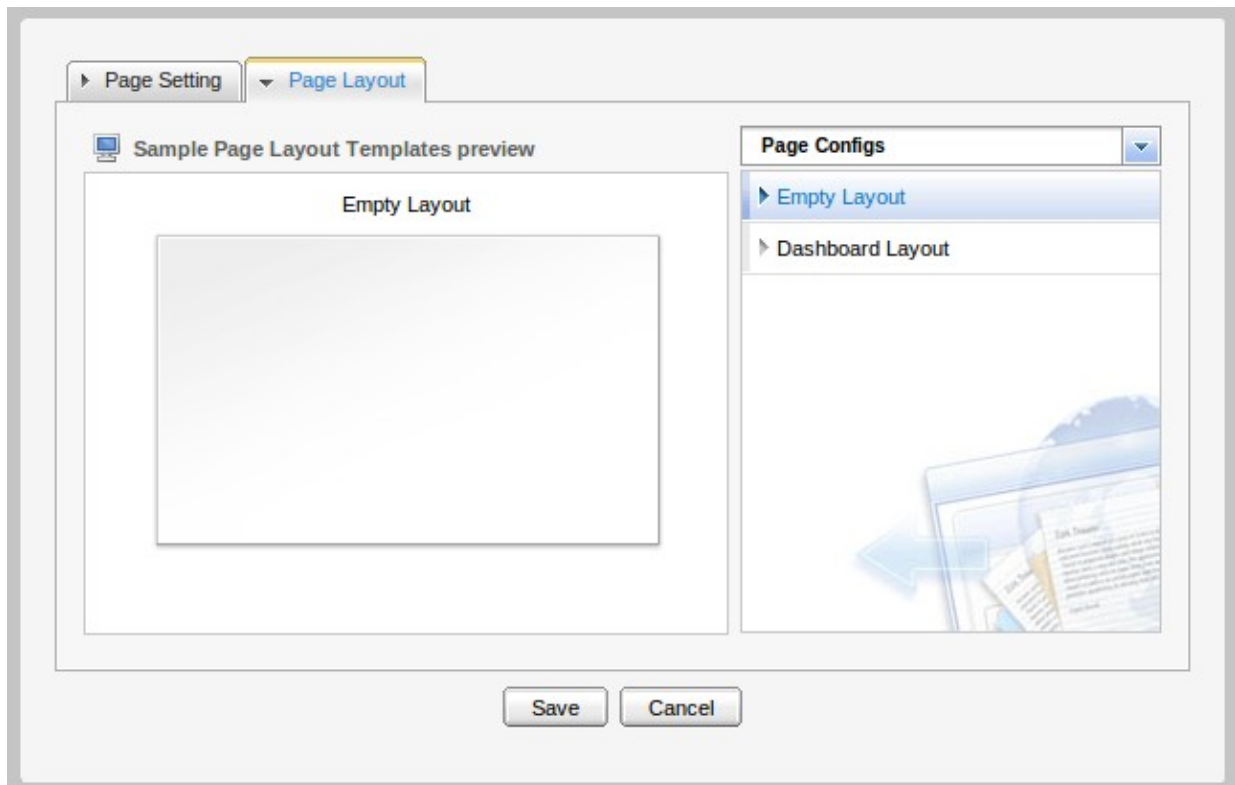


Illustration 48: The Page Layout tab of the Add New Page form

**Step 4:** Click **Save** to accept creating a new page, or **Cancel** to quit the form.

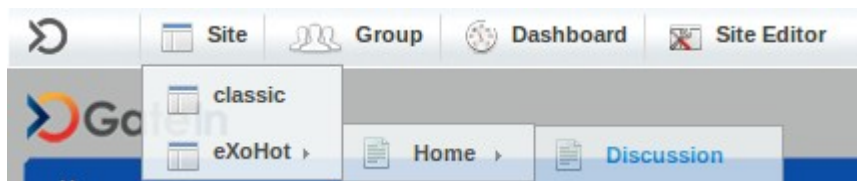
#### 4.1.3.2 Edit a page

Users who have the edit permission of a page can edit and/or delete that page.

##### Edit a page using Site Editor

To edit a page from the **Site Editor**, do as follows:



**Step 1:** Go to the page that you want to edit.



**Step 2:** Click **Site Editor**, then highlight **Edit Page**.

The page will be displayed in the edit mode with the Page Editor that allows to add more portlets or to edit the container. Besides, you can edit the existing port properties or all page properties.

**Step 3:** Make changes on the page.

**Step 4:** Click  to accept changes or  to quit without saving any change.

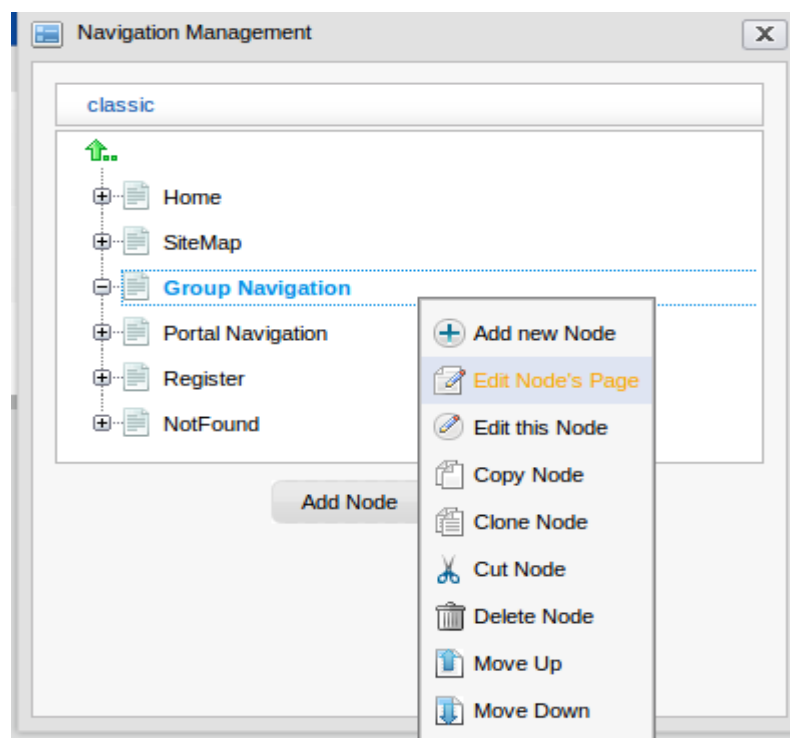
### Edit a page using Edit Portal's Navigation

**Step 1:** Click **Site** on the administration toolbar, then select **Edit Navigation** in the **Portal Navigation**.

**Step 2:** Select a navigation from the navigation list on the left pane.

**Step 3:** Select a node.

**Step 4:** Right-click that node and select **Edit node's page** in the menu.



After selecting a node, if users have the edit permission, there will be the **Page Editor** form.

**Step 5:** Click  **View Page properties** in the **Page Editor** form to edit page properties:

The screenshot shows a web form titled 'Page Setting' with a 'Permission Setting' tab also visible. The 'Page Setting' tab contains the following fields: 'Page Id' with the value 'portal::classic::homepage', 'Owner type' with a dropdown menu showing 'portal', 'Owner Id' with the value 'classic', 'Page name' with the value 'homepage' and an asterisk indicating it is required, 'Page title' with the value 'Home Page', and a 'Show Max Window' checkbox which is currently unchecked. At the bottom of the form are 'Save' and 'Cancel' buttons.

Illustration 49: The Page Setting tab of the Portal Properties form

Details:

The **Page Setting** tab includes:

- Page Id:** The page's identification string which can not be changed.
- Owner type:** The page type (portal or group or user) which can not be changed.
- Owner Id:** The identification of the page's owner. It can not be changed.
- Page name:** The page name which can not be changed.
- Page title:** The page title which can be changed and must have the length between 3 and 30 characters.
- Show Max Window:** If checked, the page's portlets will be displayed in the whole page space in a way that no tree space is left.

The **Permission Setting**: This form is to support for pages of a group or a portal. Because a page of a user is private, no one else can access or edit the user's page, except the creator so you do not have to set permission for it. Permission on each page is set in two levels: **Access Permission** and **Edit Permission**.

- **Access Permission:** It allows users to see content of a page or "borrow" that page for individual needs by selecting a page for their node. Page Access permission can be set to some user groups or set to everyone (also including unregistered users). The **Access Permission Setting** sub-tab in the **Permission Setting** tab is shown:

The screenshot shows a web interface for setting permissions. At the top, there are three tabs: 'Page Setting', 'Page Layout', and 'Permission Setting'. The 'Permission Setting' tab is active. Below it, there are two sub-tabs: 'Access Permission Setting' (active) and 'Edit Permission Setting'. The 'Access Permission Setting' sub-tab contains a checkbox labeled 'Make it public (everyone can access):' which is currently unchecked. Below this is a table with three columns: 'Group Id', 'Membership Type', and 'Action'. The table has one row with the following data: Group Id is '/platform/guests', Membership Type is '\*', and the Action column contains a trash can icon. Below the table is a button labeled 'Add Permission' with a plus icon. At the bottom of the form are 'Save' and 'Cancel' buttons.

Group Id	Membership Type	Action
/platform/guests	*	

☐ Make it public (everyone can access):

Add Permission

Save Cancel

**Illustration 50: The Access permission setting form of the Permission Setting tab**

- There is a list of current access permissions on a page. You can click the delete icon to remove the permission or click the **Add Permission** button to add more or check the **Make it public** to allow all users to access.
- **Edit permission:** It allows users to change information of a page. The edit permission is only set for one single group.  
The edit permission on a page can be set for one group with one specific membership type (or \* means all membership types in group). If you want to re-assign this permission to another group, click the **Select Permission** to choose another one. The **Edit Permission Setting** sub-tab in the **Permission Setting** tab is shown:

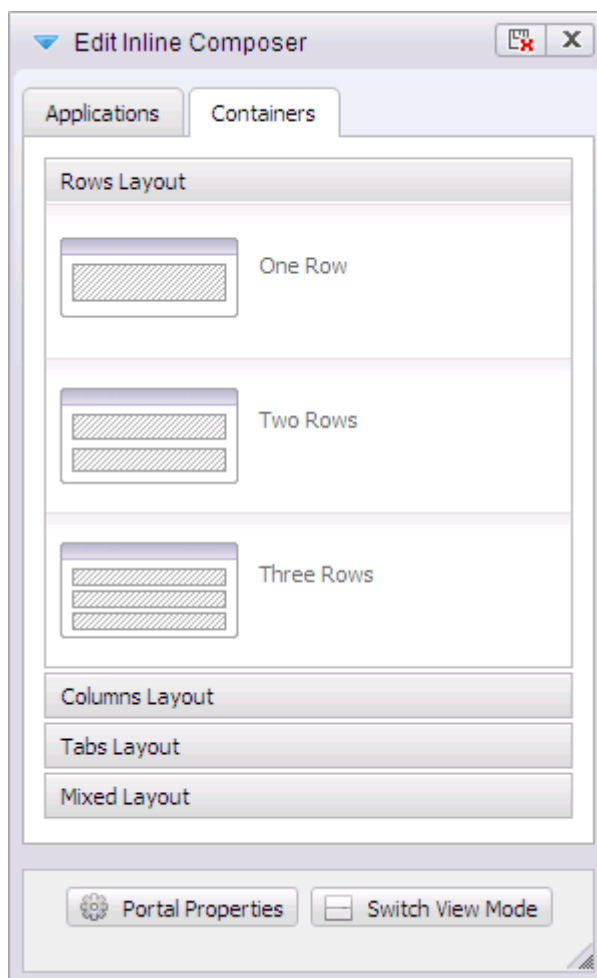
The screenshot shows a web-based administration interface. At the top, there are three tabs: 'Page Setting', 'Page Templates', and 'Permission Setting'. The 'Permission Setting' tab is active. Below this, there are two sub-tabs: 'Access Permission' and 'Edit Permission'. The 'Edit Permission' sub-tab is active. The main content area is titled 'Current Selected Permission Info' and displays the following information: 'Group Id : /platform/administrators' and 'Membership : manager'. Below this information, there are two buttons: 'Delete Permission' (with a trash icon) and 'Select Permission' (with a plus icon). At the bottom of the form, there are 'Save' and 'Cancel' buttons.

Illustration 51: The Edit Permission form

### Edit a page container layout

Click the **Container** tab of the **Edit Inline Composer** form to show the current container layout and the list of all available container layouts is shown.

If you want to change the current layout, select the layout type from the list on the left pane and then move the cursor to the template you want, then left-click, drag and drop it into the display pane. A new container will be displayed on the destination pane. You can change the position of the current container by clicking the upper-left corner, then drag and drop it to another place on the pane.



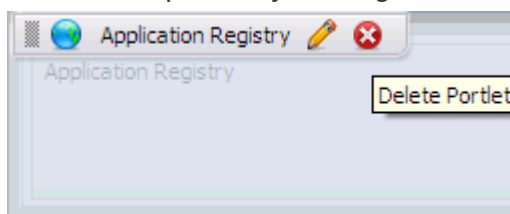
You can remove the current container by clicking the delete icon on the right corner.



### Edit the portlet layout of a page

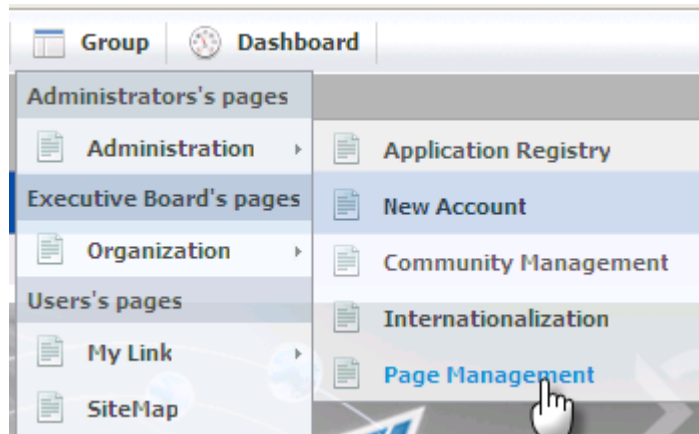
In the main pane of the page, you can drag and drop to change the position of the portlets. Besides, you can click the **Applications** tab of the **Edit Inline Composer**, then select, drag and drop new portlets into the main pane.

You can also remove the current portlet by clicking the delete icon.





















## Edit a page using Page Management

**Step 1:** Go to **Group | Administration | Page Management**.




**Step 2:** Click the icon  in the row of a page that you want to edit in the existing page.

Administration ▾				
Search: <input type="text"/>		Owner type ▾		
Page Id	Title	Access Permission	Edit Permission	Action
user::root::sales	Sales BI	{*: /platform/users }	*/platform/administrators	 
user::john::sales	Sales BI	{*: /platform/users }	*/platform/administrators	 
user::marry::sales	Sales BI	{*: /platform/users }	*/platform/administrators	 
user::demo::sales	Sales BI	{*: /platform/users }	*/platform/administrators	 
group::/platform/administrators::new	New Account	{manager: /platform/administrators }	manager: /platform/administrators	 
group::/platform/users::mylink-blog	Blog	{*: /platform/users }	*/platform/administrators	 
group::/organization/management/ex	New Staff	{*: /organization/management/exec }	manager: /organization/management/	 
group::/platform/guests::sitemap	Site Map	{*: /platform/guests }	*/platform/administrators	 
portal::classic::homepage	Home Page	{Everyone }	*/platform/administrators	 

[Add New Page](#)

The edit page will be displayed with the **Page Editor** form.

**Step 3:** Click  **View Page properties** in the **Page Editor** form.

The form to edit the page will appear below:



Page Setting    Permission Setting

Page Id : group::/platform/administrators::communityMana

Owner type: group

Owner Id: /platform/administrators

Page name: communityManagement \*

Page title: Community Management


Show Max Window : ☐

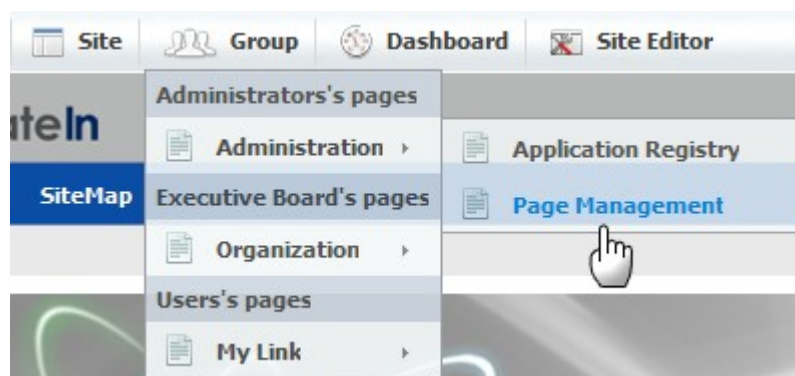
Save Cancel

#### 4.1.3.3 Delete a page

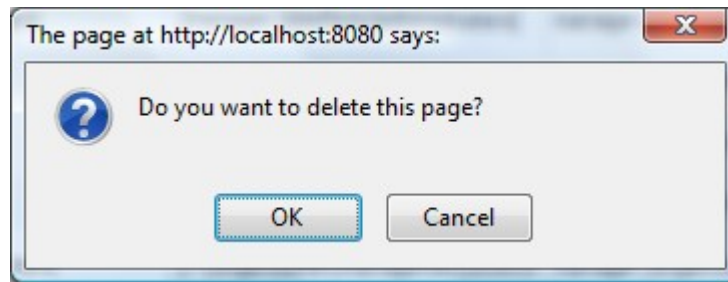
**Step 1:** Go to **Group | Administration | Page Management**.

There is a list of all existing pages.

**Step 2:** Click the trash icon  in the row of the page that you want to delete.



There will be a confirmation message whether you accept deleting a page or not:




**Step 3:** Click **OK** in the confirmation message to accept the deletion, or **Cancel** to discard.

#### 4.1.3.4 Preview a page

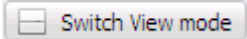
The function allows a page to be seen in the preview mode. Only users who have page's access permission can perform this action. Page access permission's information is displayed in the **Access Permission** column in the page list. If you are a member of **Access group**, you can take this action.

Follow these steps:

**Step 1:** Go to **Group | Administration | Page Management**.

**Step 2:** Click the Edit icon  in the row of the page that you want to see.

The page will be displayed with the edit mode. You can make change if you want.

**Step 3:** To preview the page, click  in the **Page Editor** form.

The page content is displayed in the preview mode.

#### 4.1.3.5 Edit page container layout

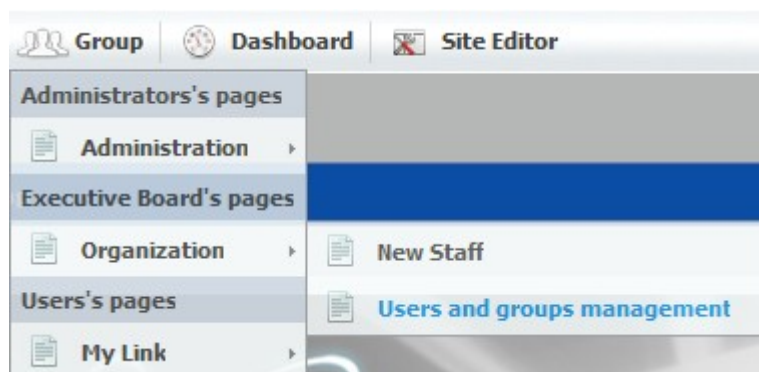
Click the **Containers** tab of the **Page Editor** form. The list of container will be displayed. If you want to change the current layout, select a layout type from the list, then left-click the template that you want, drag and drop it into the main pane. The new container will be displayed on the destination pane. You can change position of the current container by left-clicking, dragging and dropping it to another place on the pane or remove current container by clicking the delete icon on the right corner.

#### 4.1.3.6 Edit page portlet layout

If you want to change the current layout, you can select, then drag and drop to change its position or select another portlets in the Applications tab of the Page Editor form. Next, drag and drop it into the destination pane. The new portlet will be added and displayed in the selected pane. You can remove the current portlet by clicking the delete icon.

### 4.1.4 Manage users and groups

Select **Group | Organization | Users and groups management**.



The **Organization** form is shown:

User Name	Last Name	First Name	Email	Action
root	Root	Root	root@localhost	
john	Anthony	John	john@localhost	
mary	Kelly	Mary	mary@localhost	
demo	gtn	Demo	demo@localhost	

Illustration 52: The Organization form

#### 4.1.4.1 Manage users

Select the **User Management** tab in the **Organization** form. By default, all existing registered users are shown.

Administrators can see, search, edit or even delete them. Each users group or membership in these groups are also available. You can not add a new user but can remove one user from the group.

##### Search for users

Administrators can use this function to search for specific users by User Name, First Name, Last Name or Email Address. To search for a specific user, do as follows:

**Step 1:** Type the **Search** term related to the user that you want to search. You do not need to enter an exact term.

**Step 2:** Select the information type you want to search against.

User Name	Last Name	
demo	exo	
john	Anthony	John
marry	Kelly	Marry
root	Root	Root

Search:  User Name User Name Last Name First Name Email

**Step 3:** Click the magnifying glass icon to perform the search.

## Edit users

**Step 1:** Click the edit icon  corresponding to the user that you want to edit.

**Step 2:** Select the **Account Info** tab to view and change the essential user information.

Account Info

User Profile

User Membership

User Name: demo \*

First Name: Demo \*

Last Name: gtn \*

Email Address: demo@localhost \*

Change Password: ☒

New Password: \*

Confirm Password: \*

Save

Cancel

Illustration 53: The Account Info tab of the Edit User Info form

The **User Name** field can not be changed:

The **Change Password** option allows the user to make a new password when he/she forgets his/her password. When the **Change Password** option is unchecked, **New Password** and **Confirm Password** are hidden. Passwords must contain at least 6 characters (letters, numbers and punctuation marks)

**Step 3:** Select the **User Profile** tab to view and change profile information. The **Language** field is used to set the display language of that user.

Illustration 54: The User Profile tab of the Edit User Info form

**Step 4:** Select the **User Membership** tab to see user's information in groups.

User Name	Group Id	Membership Type	Action
demo	/platform/guests	member	
demo	/platform/users	member	

Illustration 55: The User Membership tab of the Edit User Info form

- The **User Membership** tab indicates to which group the selected user belongs. In the above figure, **demo** is a member of two groups: **guests** and **users**. The parent group of both is **platform**.
- To remove a user from a group, click the trash icon in the row that corresponds with the user who you want to remove.

**Step 5:** Click **Save** to accept changes.

#### Delete a user

Do as follows:

**Step 1:** Click the trash icon which corresponds to the user who you want to delete in the main User Management form.

**Step 2:** Click **OK** in the confirmation message to accept or **Cancel** to quit.

#### 4.1.4.2 Manage groups

Select the **Group Management** tab in the **Organization** form. This tab is used to add new, edit or delete a group.

User Name	First Name	Last Name	Membership Type	Email	Action
root	Root	Root	*	root@localhost	
john	John	Anthony	member	john@localhost	
root	Root	Root	manager	root@localhost	

**Add member**

User Name  \*

Membership manager

Illustration 56: Group Management form

By default, all existing groups will be displayed on the left pane. The right pane shows information about the selected group, including information about members in a specific group and a small form to add a new user to a group.

#### Add a new group

**Step 1:** Choose the path to create a new group by selecting the group from the list on the left pane or clicking the arrow up icon if you want to create a group in a higher level. The selected path is displayed in the breadcrumb bar.

**Step 2:** Click **Add New Group** icon . The **Add New Group** form will be displayed on the right pane.

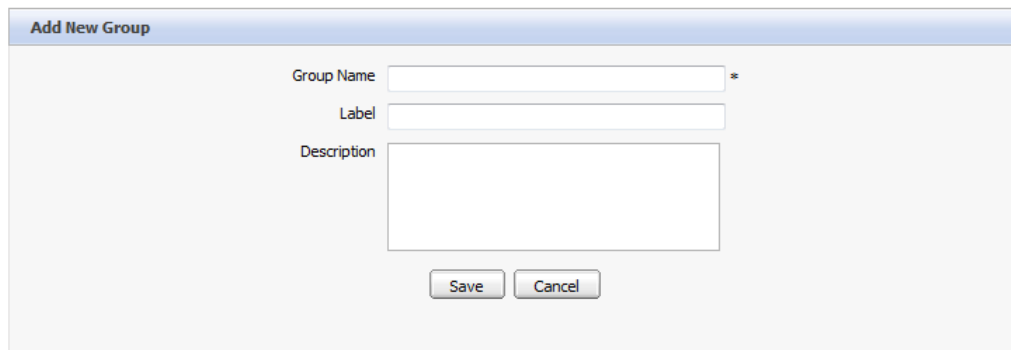
The 'Add New Group' form is a dialog box with a light blue header. It contains three input fields: 'Group Name' (required, marked with an asterisk), 'Label', and 'Description'. Below the fields are 'Save' and 'Cancel' buttons.

Illustration 57: The Add New Group form

Details:

- Group Name:** The new group's name. This field is required and its length must be between 3 and 30 characters.
- Label:** The group's display name. Any length between 3 to 30 characters is allowed.
- Description:** The description about the group. Any length between 3 to 30 characters is allowed.


**Step 3:** Fill in the required fields. Only alphabetic, numeric and underscore characters are allowed and it must be unique.

**Step 4:** Click **Save** to accept entered values, or **Cancel** to quit.

**Note:** When a new group is added, the group creator will become the manager of that group. The creator's user name will be added in the created group with the "manager" membership.

### Edit a group

**Step 1:** Find the group in the existing tree and click the label.

**Step 2:** Click the edit icon  to show the **Edit Current Group** form of the selected group.

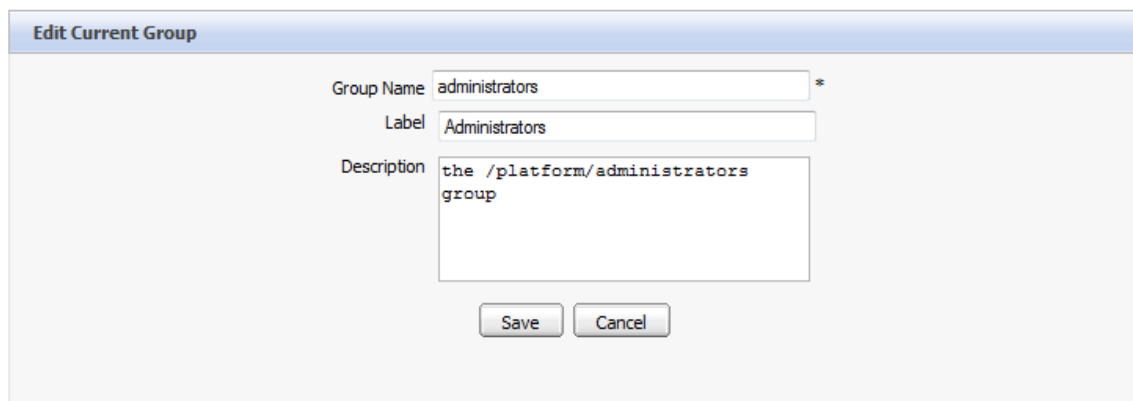
The 'Edit Current Group' form is a dialog box with a light blue header. It contains three input fields: 'Group Name' (containing 'administrators', marked with an asterisk), 'Label' (containing 'Administrators'), and 'Description' (containing 'the /platform/administrators group'). Below the fields are 'Save' and 'Cancel' buttons.

Illustration 58: The Edit Current Group form

This form is identical with the **New Group** form. The **Group Name** can not be changed by any user.

**Step 3:** Make change to the **Label** or **Description** fields.

**Step 4:** Click **Save** to accept changes, or **Back** to return to the **Group Infor** form without any changes.

### Add a new user to a group

**Step 1:** Select the path to the group which you want to add a new user to that group by

selecting that group from the list on the left pane. The group's information is displayed, including the user list and a form which allows adding a new user.

**Group Info**

User Name	First Name	Last Name	Membership Type	Email	Action
root	Root	Root	manager	root@localhost	
john	John	Anthony	member	john@localhost	

**Add member**

User Name  \*

Membership

**Illustration 59: The Add member form**

**Step 2:** Enter the exact **User Name** of the user that you want to add to the selected group or you can enter some characters if you are not sure about the exact spelling.

- Click the magnifying glass icon to search by the characters you entered.
- After you click the magnifying icon , there will be a list of all existing users whose User Names include the entered characters. For example, you enter the letter 'o', you will get the following result.

**Select User**


Search :  User Name

<input type="checkbox"/>	User Name	First Name	Last Name	Email
<input type="checkbox"/>	root	Root	Root	root@localhost
<input type="checkbox"/>	john	John	Anthony	john@localhost
<input type="checkbox"/>	mary	Mary	Kelly	mary@localhost
<input type="checkbox"/>	demo	Demo	gtn	demo@localhost

**Illustration 60: The Select User form**

- Select the checkbox of the user(s) that you would like to add to the group.
- After clicking the **Add** button, you will see the complete User Name(s) in the **Add member** form.




- Select the membership for the user in a group from Memberships list. The refresh icon  can be used to update the membership list in case there are any change.
- Click **Save** to accept adding the selected user to a specific group with the selected membership type.

**Note:**

- *By default, the “manager” membership has the highest right in a group.*
- *A user can have several membership types in a group. To do that, you have to use the Add member form for each membership type.*
- *After adding, the user's membership information is also updated. You can check it by opening the User Management form and editing the user you just added.*

### Edit a user membership in a group

**Step 1:** Click the Edit icon  corresponding to a specific user with a membership in the **Action** column:

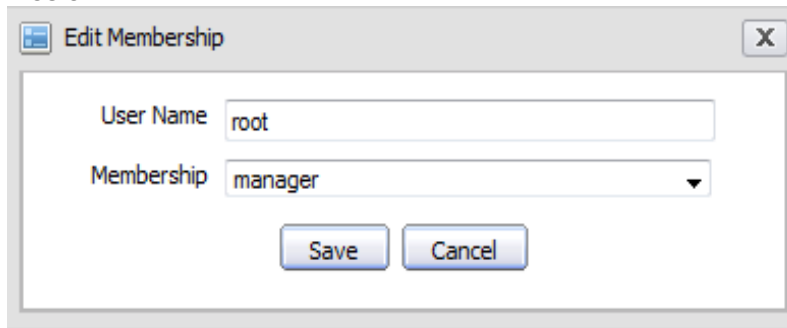


Illustration 61: The Edit Membership form

**Step 2:** Change the membership of the selected user by selecting another value in the **Membership** list box.

**Step 3:** Click **Save** to complete changing.

### Delete a group

**Step 1:** Find the group in the tree.

**Step 2:** Click the trash icon  to delete.

**Step 3:** Click **OK** in the confirmation message box to accept deleting, or **Cancel** to quit without deleting.

**Note:**







- *After being deleted, all information related to that group is also deleted (users and navigation related to this group).*
- *These following groups are mandatory in the portal, so you cannot delete: Platform; Platform/guests; Platform/users.*

### 4.1.4.3 Manage memberships

The user's role in a specific group is managed by using **Membership Management**.

By default, there are three membership types: Manager, Member and Validator. By default, Manager has the highest right in a group. You can add new, edit or delete a membership type.

Select the **Membership Management** tab in the **Organization** portlet. There will be a membership type list and a form to add new/edit:

Membership name	Created date	Modified date	Description	Action
member	13:43:00 2010-03-09	13:43:00 2010-03-09	member membership type	 
manager	13:43:00 2010-03-09	13:43:00 2010-03-09	manager membership type	 
validator	13:43:00 2010-03-09	13:43:00 2010-03-09	validator membership type	 

**Add/Edit Membership**

Membership name  \*

Description

Illustration 62: The Membership Management form

### Add a new membership type

**Step 1:** Input values for the **Membership name** field (required) and the **Description** field (optional) in the **Add/Edit Membership** form at the bottom. Only letters, digits, dots, dashes and underscores are allowed for the **Membership name**. Note that no space is allowed in the **Membership name**.

**Step 2:** Click **Save** to accept adding a new membership, or click **Reset** to clear the entered values.

### Edit a membership type


**Step 1:** Click the edit icon  in the **Action** column.

**Step 2:** Make desired changes in this form.

**Step 3:** Click **Save**.

### Delete a membership type

Do as follow:

**Step 1:** Click  in the row of the membership type you want to delete.

**Step 2:** Click **OK** in the confirmation message to accept the deletion.

## 4.1.5 Manage navigation

### 4.1.5.1 Portal's page navigation

#### Create a navigation

The page navigation of portal is created automatically when a portal is created.

#### Delete a navigation

No one can create the portal's page navigation. Thus, no one can delete it. A navigation will be deleted automatically after you have deleted its portal.

#### 4.1.5.2 User's page navigation

##### **Create a navigation**

The page navigation of a user is created automatically when a user is created (registered). You donot have to create it.

##### **Edit a navigation**

Only the user who is the owner of the user page navigation can edit it.

##### **Delete a navigation**

No one can create a user page navigation so that no one can delete it. A navigation is deleted automatically when its user is deleted.

#### 4.1.5.3 Group's page navigation

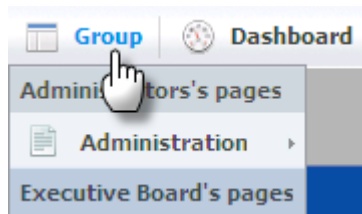
Each group has only one page navigation. Only users of that group have the “manager” membership can create/edit/delete navigation for that group. This right is set in the *portal-configuration.xml* file.

```
<value-param>  
  <name>navigation.creator.membership.type</name>  
  <description>specific membership type have full permission with group  
  navigation</description>  
  <value>manager</value>
```

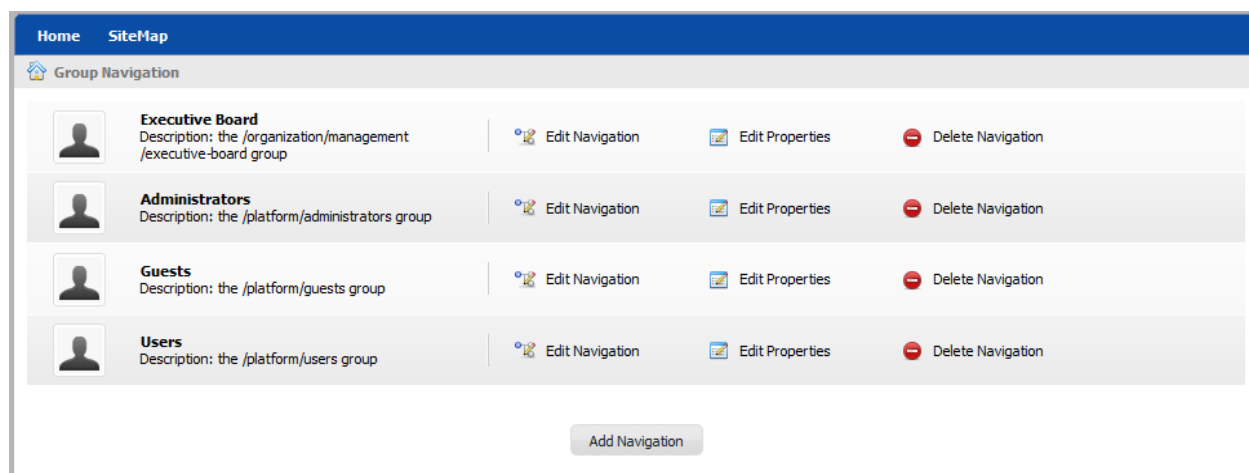
#### Edit group's page navigation

Follow these steps:


**Step 1:** Click **Group** on the administration toolbar:



The **Group Navigation** page will appear:



**Illustration 63: The Group Navigation page**

**Step 2:** Click  **Edit Properties** which corresponds to the group you want to edit its page navigation.

The form to edit the page navigation will appear:

**Step 3:** Make change to values in this form.

**Step 4:** Click **Save** to accept any change, or **Cancel** to quit.

**Note:** *The priority value determines the display position of the page navigation.*

### Create a new page navigation

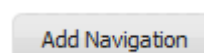
Who can create pages for a group?

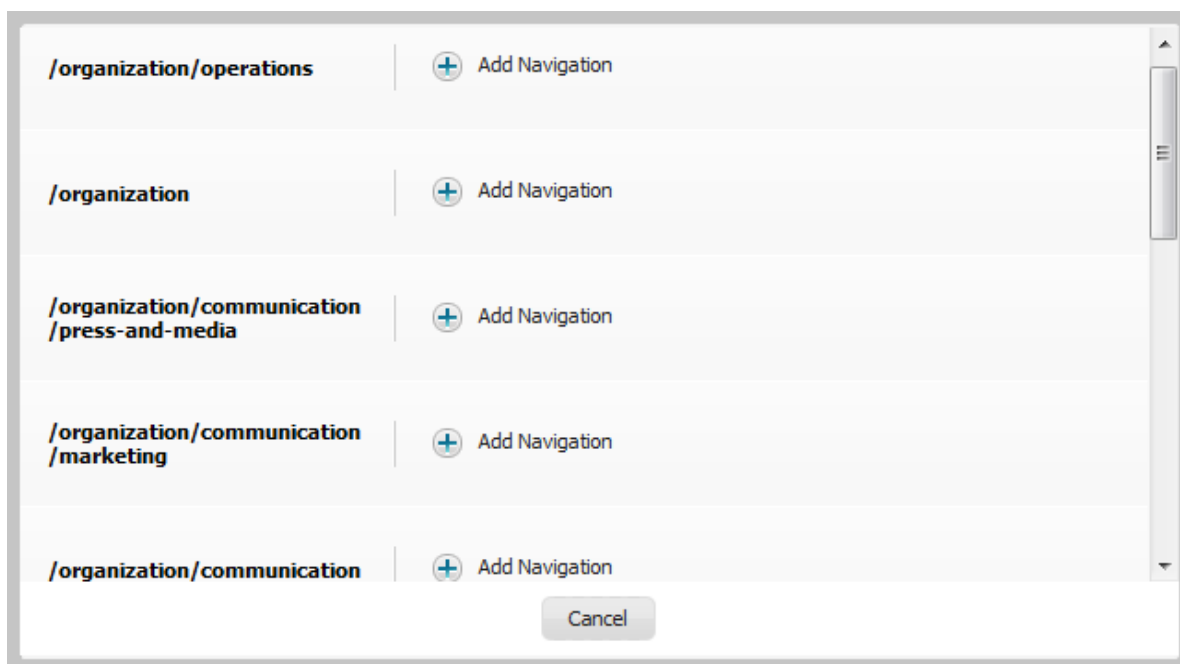
Only users who are “manager” of a group can create new pages for that group while the others in this group can not.


To create a page navigation, do as follows:

**Step 1:** Click **Group** on the administration toolbar, then select

The Group list form will be displayed with the **Add Navigation** button.






**Step 2:** Select the **Group** that you want to add Navigation and click the button  Add Navigation . The new group navigation will be added to the group navigation list.

After being added, the new group navigation is displayed in the group navigation list on the left and ready to be added nodes or pages.

Each group has only one navigation. If you add a new group navigation that exists, an alert message will appear to show that you can not create that navigation.

### Edit group's navigation properties

This function is to change the priority of a navigation. Only users who have the right can take this action.

**Step 1:** Click **Group** on the administration toolbar, then click  Edit Properties of the navigation you want to edit. The **Page Navigation Form** enabling you to change the priority of this navigation will appear:

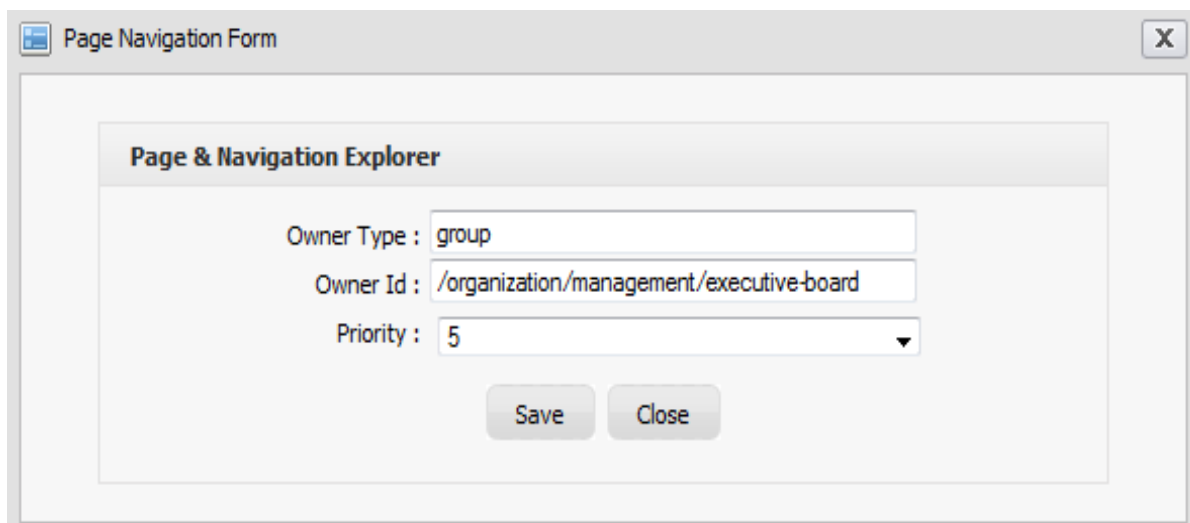


Illustration 64: The Edit Navigation form


**Step 2:** Change the priority of this navigation for the **Priority** field.

**Step 3:** Click **Save** to accept changes, or **Close** to quit.

### Delete a group's navigation

This function is used to delete an existing navigation. It is only supported for a group navigation. A user navigation or a portal navigation will be automatically deleted when the owner user or portal is deleted.

Follow these steps:

**Step 1:** Click **Group** on the administration toolbar and click  **Delete Navigation** of the navigation you want to delete.

**Step 2:** Click **OK** to confirm deleting, or **Cancel** to quit without deleting.

After the navigation deletion has been confirmed, the selected navigation is removed from the list and its nodes (hyperlinks to pages) are also deleted.

## 4.1.6 Manage permissions

### How to see a page in public

Seeing a page in public means that you can access that page without signing in. To make a page accessible to the public, you have to follow these instructions:

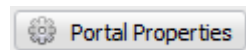
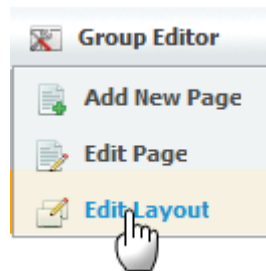
- The current portal in use must be public (everyone can access).
- The node containing the page that you want to see must belong to the public portal.
- The page which is selected by the node above must be in public (everyone can access).

#### 4.1.6.1 Set an access permission on a portal

To set access permission for the portal, do as follows:

- For new portals: click **Site | Create New Portal | Permission Setting** tab | **Access Permission Setting** sub-tab.
- For existing portals: Go to the portal that you want to change the edit permission

by selecting **Site Editor | Edit layout:**



Then click  in the **Edit Inline Composer**, go to **Permission Setting** tab | **Access Permission Setting** sub-tab.

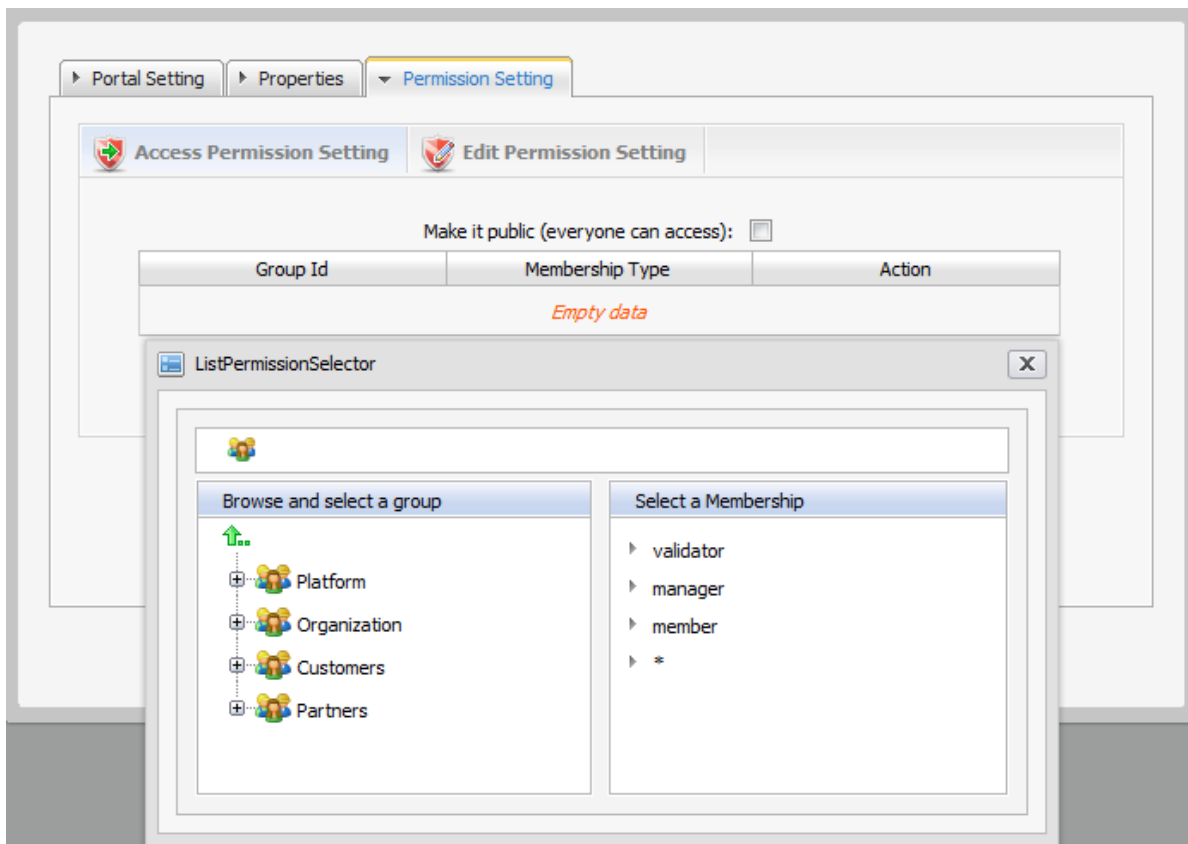
To assign an access permission to users in the public mode (without signing in), you have to set the access permission on a portal. To do that, in the **Access Permission Setting** sub-tab, check **Make it public**.

If you do not want everyone to access to the portal, do not check **Make it public** and you have to select group by group. Follow these steps:

**Step 1:** Click **Add Permission**.

**Step 2:** Select the group that you want to add on the left and then select a membership type on the right. In the membership type list, the sign \* means enabling any membership type.

**Step 3:** After you have selected a membership type, the selected permission is displayed in the access right list. Each time you only can select one group with one membership type. If you want to add more, click **Add Permission** and select again.




#### 4.1.6.2 Set an edit permission on a portal

Only users who are in the portal editor group can edit that portal. Access permission can be set for several groups but the edit permission can only be set for a group with a membership type (or every membership type by selecting \*). To assign an edit permission to a user, you must add him to the editor group of that portal.

**Step 1:** To assign permission on a portal, do as follows:

- For new portals: click **Site | Create New Portal | Permission Setting tab | Edit Permission Setting** sub-tab.
- For existing portals: Go to the portal you want to change the edit permission selecting **Site Editor | Edit layout**:

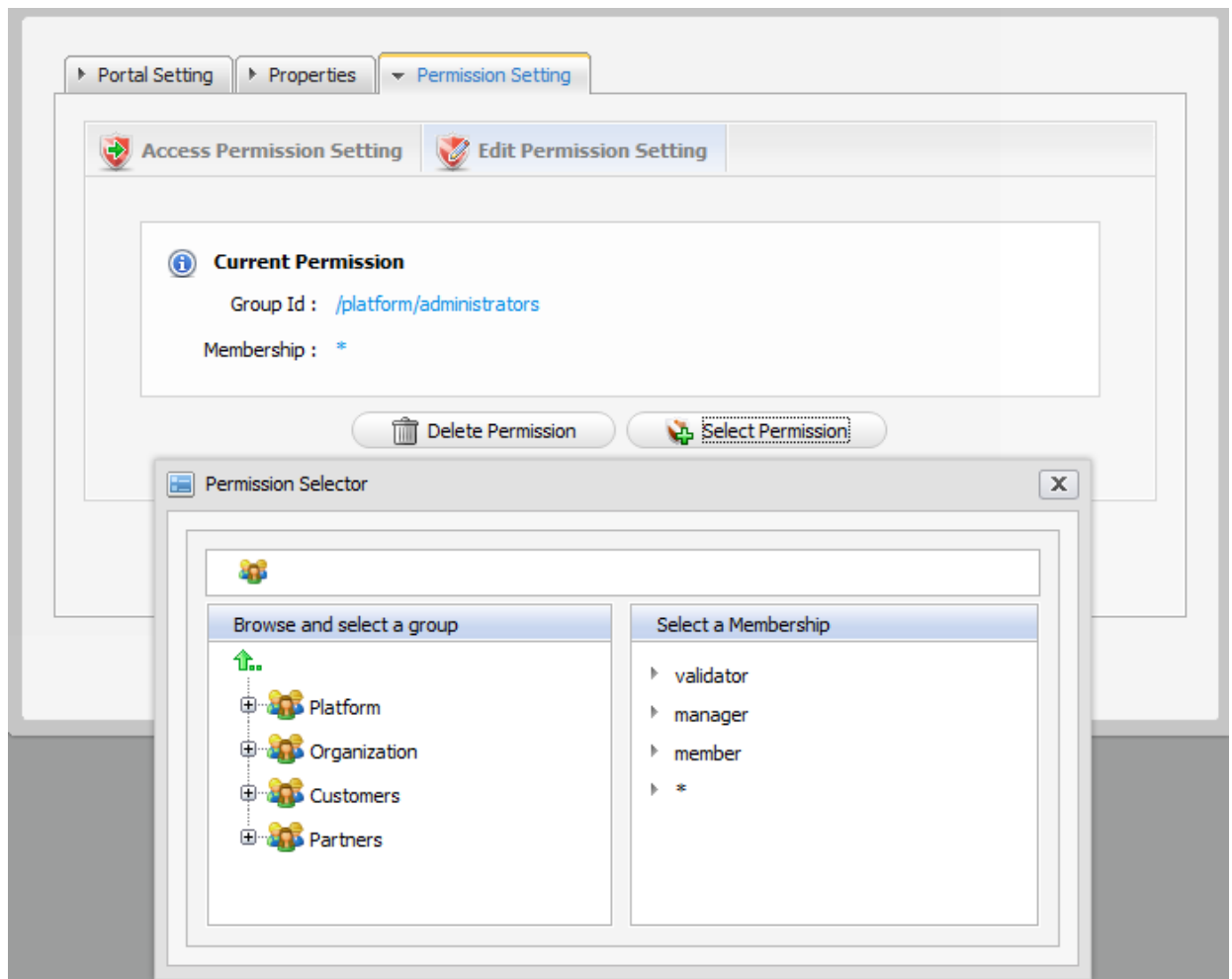
Then, click  **Portal Properties** in the **Edit Inline Composer**, go to **Permission Setting tab | Edit Permission Setting** sub-tab.

**Step 2:** Click **Select Permission** to choose a group.

**Step 3:** Select a group and a membership type (select \* if you want to assign all membership types in the selected group). After a membership has been selected from the right, the selected information is displayed.

**Step 4:** Click **Save** to accept.





#### 4.1.6.3 Set a permission on a page

In some cases, some rights on a page are initialized and users who have the edit permission can change the page.

- If the owner type of a page is “user”, you don’t have to set permission, no one except the creator has the access and edit permission.
- If the owner type of a page is “group”, initial permissions on page are:
  - *Access permission*: everyone in that group.
  - *Edit permission*: the manager of that group.
- If the owner type of a page is portal, initial permissions are:
  - *Access permission*: users who can access that portal.
  - *Edit permission*: users who can edit that portal.

#### Set an access permission on a page

Do as follows:

- Click **Group | Administration | Page Management | Add New Page**, select **Owner type** which is group or portal | **Permission Setting** tab | **Access Permission Setting** sub-tab.

- Click **Group | Administration | Page Management | the edit icon | View page properties** (of the **Page Editor** form) | **Permission Setting** tab | **Access Permission Setting** sub-tab.
- Click **Group** (on the administration toolbar) | **Edit Navigation**. Then, select and right-click the node which contains the page you want to edit. Select **Edit Node's Page | View page properties** of the **Page Editor** form | **Permission Setting** tab | **Access Permission Setting** sub-tab.

To access to a page (read the page content or perform an action on a page), users have to be in one of the groups that have access permission to that page. There may have several groups that have access permission to a page. If you wish anyone could access to the page, check **"Make it public"**, otherwise you have to select the groups one by one.

- Click **Add Permission**.
- Select the group that you want to add on the left and then select a membership type on the right. In the membership type list, \* means allowing any membership type.
- After a membership type has been selected, the selected permission is displayed in the access right list. For each time, you can only select one group with one membership type. If you want to add more, click the **Add Permission** button and select again.

#### Set an edit permission on a page

Only users who are in the page's editor group can edit it. The access permission can be assigned to several groups but the edit permission only can be set for one single group. To assign edit permission on page to a user, you must add him to the editor group of that page.

**Step 1:** Select:

- **Group | Administration | Page Management | Add New Page | Owner type** (which is group or portal) | **Permission Setting** tab | **Edit Permission Setting** sub-tab.
- **Group | Administration | Page Management | the edit icon | View page properties** of the **Page Editor** form | **Permission Setting** tab | **Edit Permission Setting** sub-tab.
- **Group | Edit Navigation**. Select and right-click the node which contains the page you want to edit. Then, select **Edit Node's Page | View page properties** of the **Page Editor** form | **Permission Setting** tab | **Edit Permission Setting** sub-tab.

**Step 2:** Click **Select Permission** to set new or change another groups.

**Step 3:** Select a group with a membership type (select \* if you want all membership type in the selected group)

After selecting a specific membership from the right, the selected information is displayed.

**Step 4:** Click **Save** to accept.

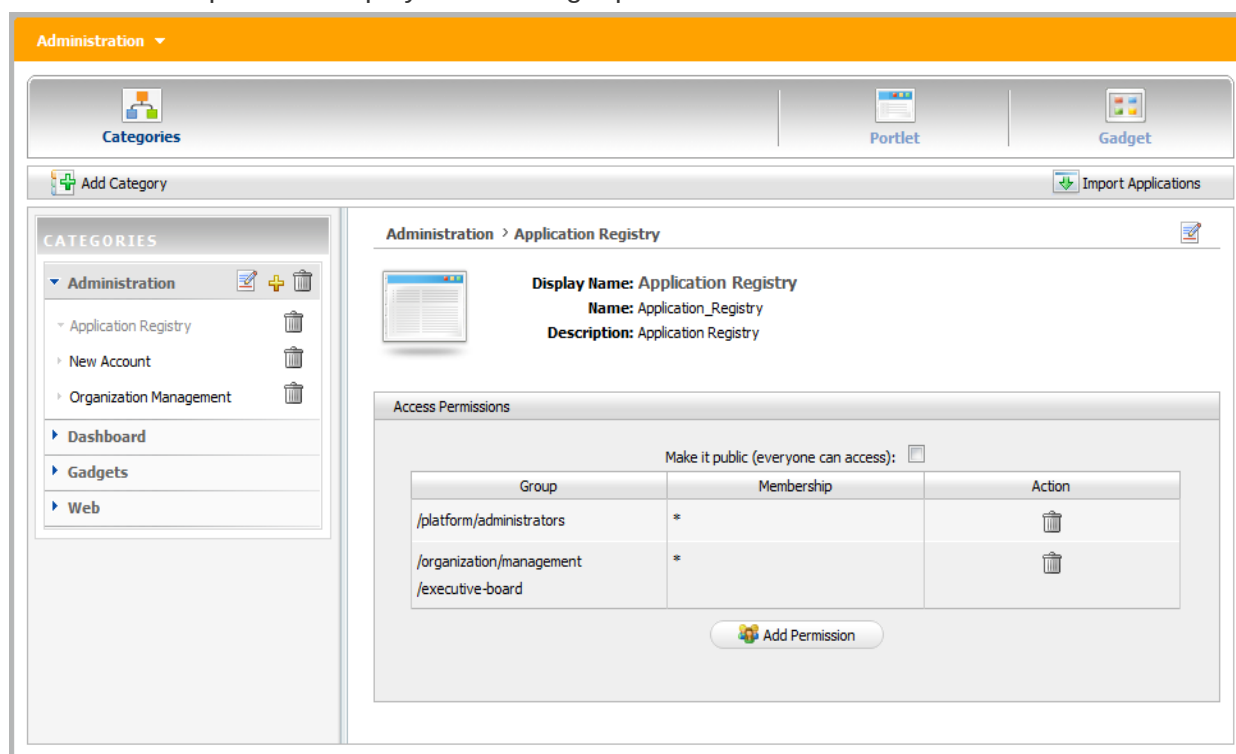
#### 4.1.6.4 Set an access permission on a portlet

Follow these steps:

**Step 1:** Go to **Group | Administration | Application Registry** on the administration toolbar.

**Step 2:** Select a category on the left pane that includes the portlet you want to set right.

Then all portlets of the selected category are listed immediately and detailed information of each portlet is displayed on the right pane.




- To set a permission for a portlet:
  - Click the Add Permission button to add access permissions to more groups; or check Make it public to allow everyone to access.

## 4.2 Manage portlets/gadgets/categories

### 4.2.1 Add a portlet/gadget to a specific category

This function helps you add portlets to a specific category. Follow these steps:

**Step 1:** Click the Add icon  on the title bar of a category to which you want to add portlets. The form to add a portlet into a category will appear on the right pane:

Display Name:   
Application Type: Portlet

Choose	Display Name	Description
<input checked="" type="radio"/>	Organization Portlet	Organization Portlet
<input type="radio"/>	Navigation Portlet	Navigation Portlet
<input type="radio"/>	Site Map Portlet	SiteMap Portlet
<input type="radio"/>	User Toolbar Group Portlet	User Toolbar Group Portlet
<input type="radio"/>	Application Registry	Application Registry
<input type="radio"/>	Administration Toolbar Portlet	Administration Toolbar Portlet
<input type="radio"/>	Tabbed Dashboard	Tabbed Dashboard Portlet
<input type="radio"/>	Gadget Wrapper Portlet	Gadget Wrapper Portlet
<input type="radio"/>	User Toolbar Site Portlet	User Toolbar Site Portlet
<input type="radio"/>	Footer Portlet	Footer Portlet

Total pages: 3
<< < 1 2 3 > >>

Add Cancel

Details:

**Display name:** The display name of a portlet/gadget that you want to add to a category.

**Application Type:** The type of the selected object.


**Step 2:** Select a portlet and/or gadget.

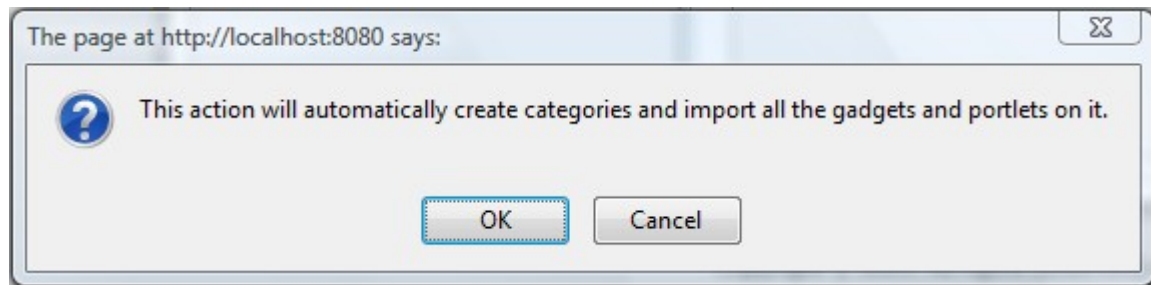
**Step 3:** Enter the display name and select a type for the selected portlet/gadget.

Click **Save** to accept adding a portler and/or gadget to a category.

### 4.2.2 Auto-import default portlets/gadgets

This function supports users auto-import default portlets/gadgets into different categories and these portlets/gadgets will be listed in left pane. Follow these steps:

**Step 1:** Click  Import Applications at the right corner on the action bar. A dialog will appear:



**Step 2:** Click **OK** on this message to accept importing portlets and gadgets automatically.  
All portlets and gadgets of all categories will be imported and listed on the left pane.

### 4.2.3 View detailed information of a specific portlet

Follow these steps:

**Step 1:** Go to the **Group | Administration | Application Registry** page in the Administration toolbar. The form for viewing all portlets will appear, details:

- **Left pane:** lists all portlets in two parts: Local and Remote
- **Right pane:** shows detailed information about a portlet: Name, Display name, Description and Access permission.

**Step 2:** Select one portlet in the list on the left pane. The detailed information of that portlet will be shown on the right pane.

### 4.2.4 Manage gadgets

#### 4.2.4.1 Where you can use a gadget

A gadget is a mini web application running on a platform and you can put it in a web page. Only users who are member can use these applications for their individual needs. You can use gadgets in two places:

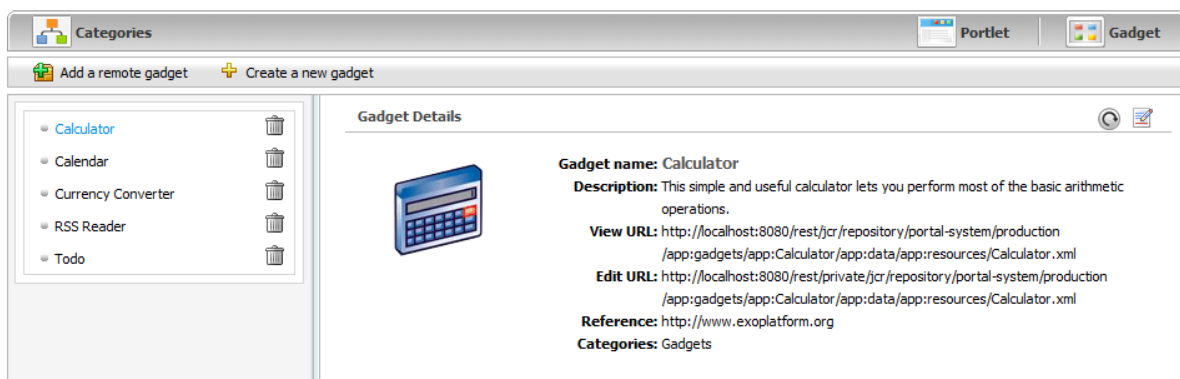
1. Add gadgets to Dashboard.
2. Add gadgets to Desktop page (for WebOS).

#### 4.2.4.2 Add a gadget

This function helps you add a gadget into the gadget list.

Follow these steps:

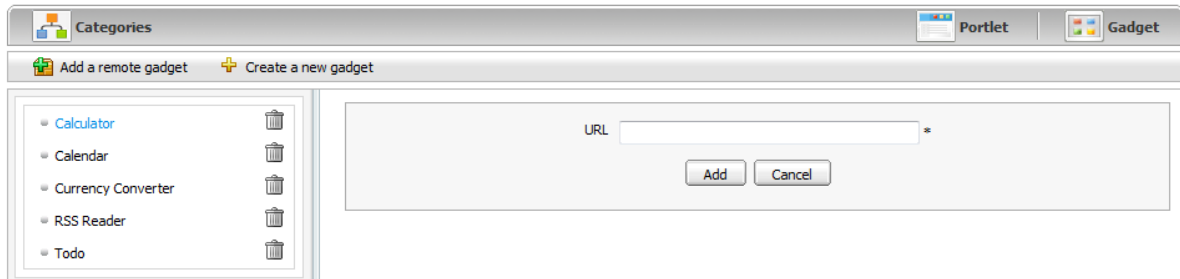
Go to the **Group | Administration | Application Registry** page (on the Administration toolbar) | **Gadget**:



You can add a remote gadget or create a new gadget into the list.

## Add a remote gadget



**Step 1:** Show the form to add a remote gadget by clicking **Add a remote gadget**:



**Step 2:** Enter a link to a .xml file in the **URL** field.

**Step 3:** Click **Add** to accept the inputted url, or **Cancel** to quit. The added gadget will be added into gadget list on *left pane* of the Dashboard portlet

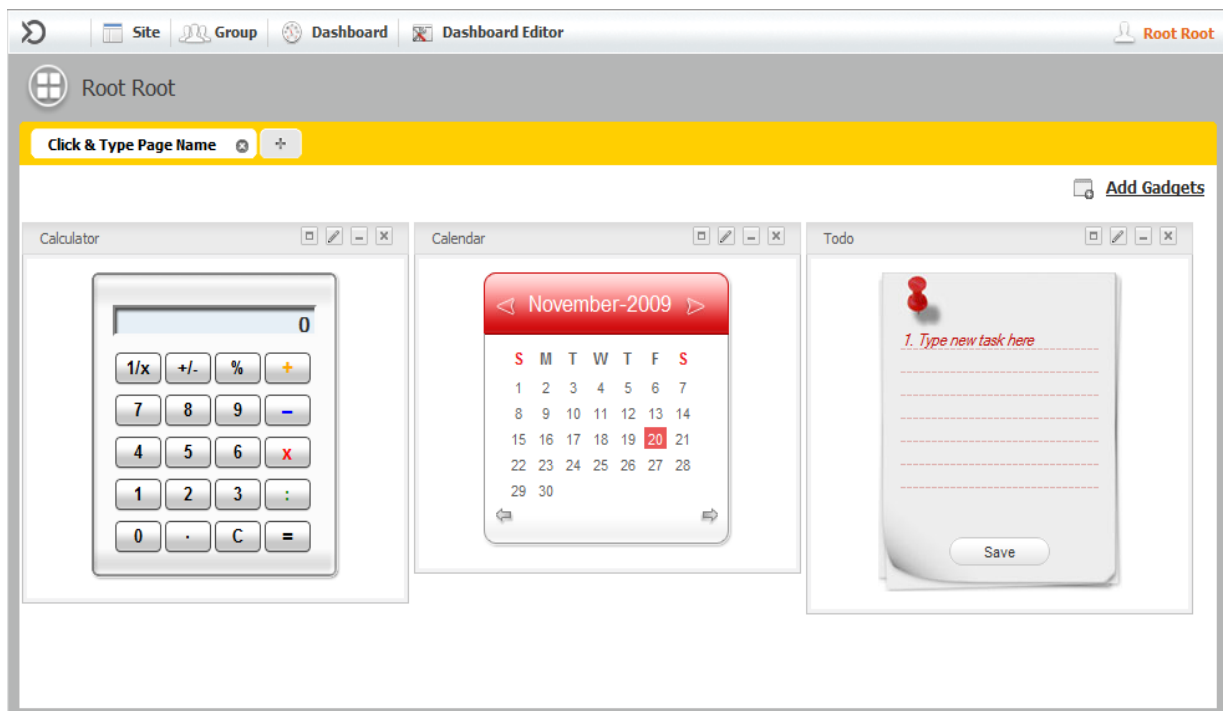
**Note:**

1. To refresh the remote gadget: Click the Refresh information icon  on the upper-right corner of the Gadget Details form to renew and update any changes from the remote gadget.
2. To edit the remote gadget: Click the edit icon  to edit the source code of this gadget .

## Add a gadget to the Dashboard

This function allows adding gadgets to a specific dashboard by dragging and dropping actions.

When clicking the Dashboard of the main administration toolbar, the Dashboard will appear with the current gadgets in the default tab.

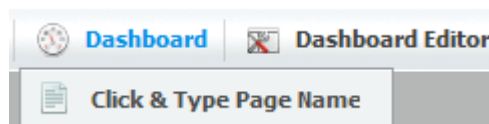


**Illustration 65: The Dashboard main screen**

You can use ready-to-use gadgets in your Dashboard. The gadgets of your Dashboard are organized in the dashboard tab. A dashboard task can contain one or more gadgets. You can create new a tab and add new gadgets to an existing tab.

**To add new a dashboard tab, follow these steps:**

**Step 1:** Click **Dashboard** | **Click & Type Page Name** tab:

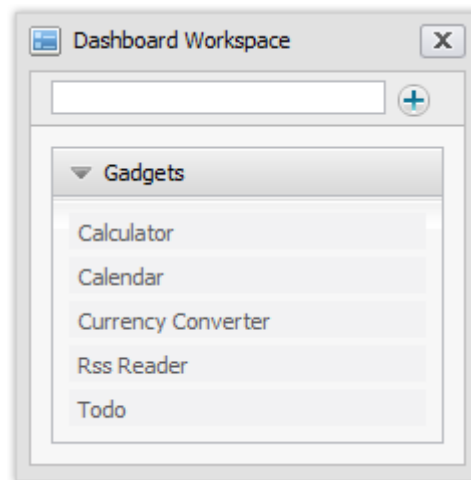


or click the plus icon:

**Step 2:** Enter a tab name and enter to accept add a new dashboard tab.

**To add a new gadget, do as follows:**

**Step 1:** Go to a dashboard tab and click  **Add Gadgets**.




**Step 2:** Enter the HTML link of the gadget that you want to add to your homepage.

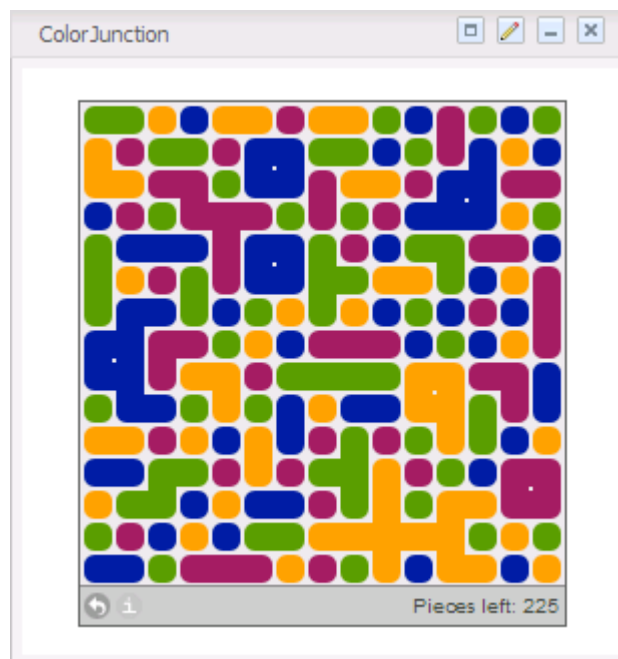
**Step 3:** Click  to add.

For example:

Add the link below in to the text box :

<http://www.google.com/ig/modules/colorjunction.xml>

Click  to add. The gadget will be added below:



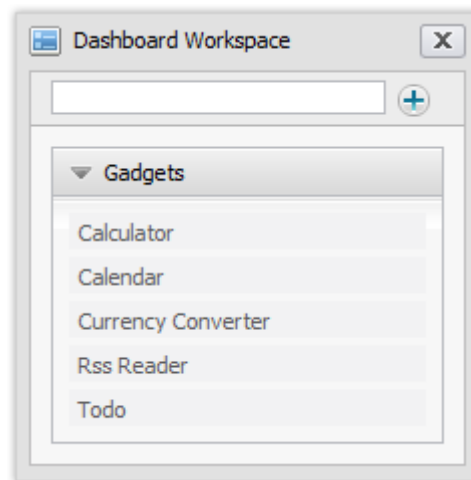
To drag and drop to add gadgets into a dashboard tab, follow these steps:

**Step 1:** Go to the tab that you want to add gadgets

**Step 2:** Click  **Add Gadgets**

The gadget list will be displayed:

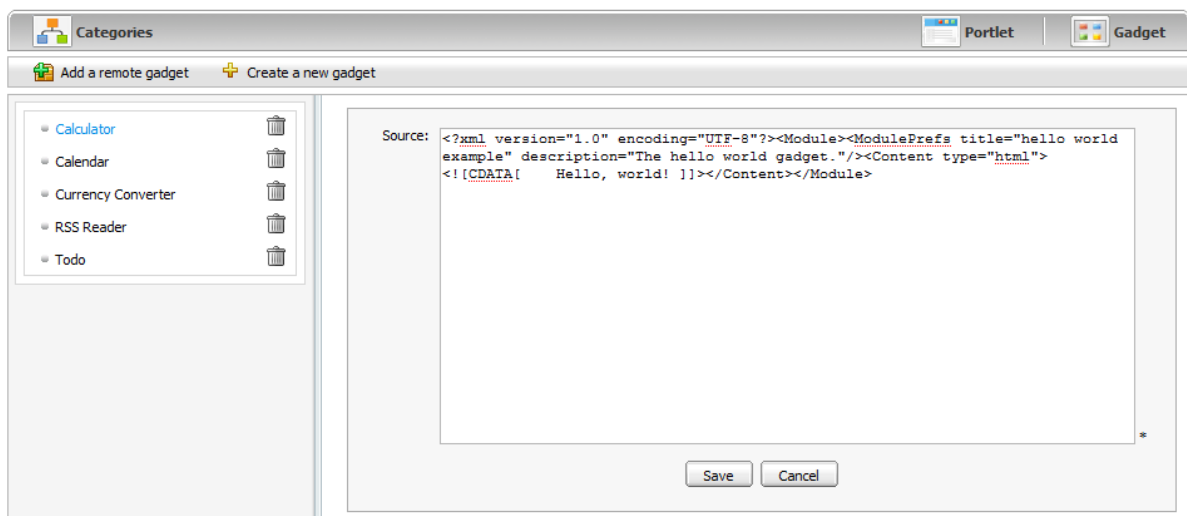




**Step 3:** Drag and drop the gadget that you want to add into the tab. Similarly, at the Dashboard Editor, you can add a new page, edit a page, and edit the layout of current dashboard which is being viewed.

#### 4.2.4.3 Create a new gadget

**Step 1:** Show the form to add a new gadget by clicking **Create a new gadget**:



Details:

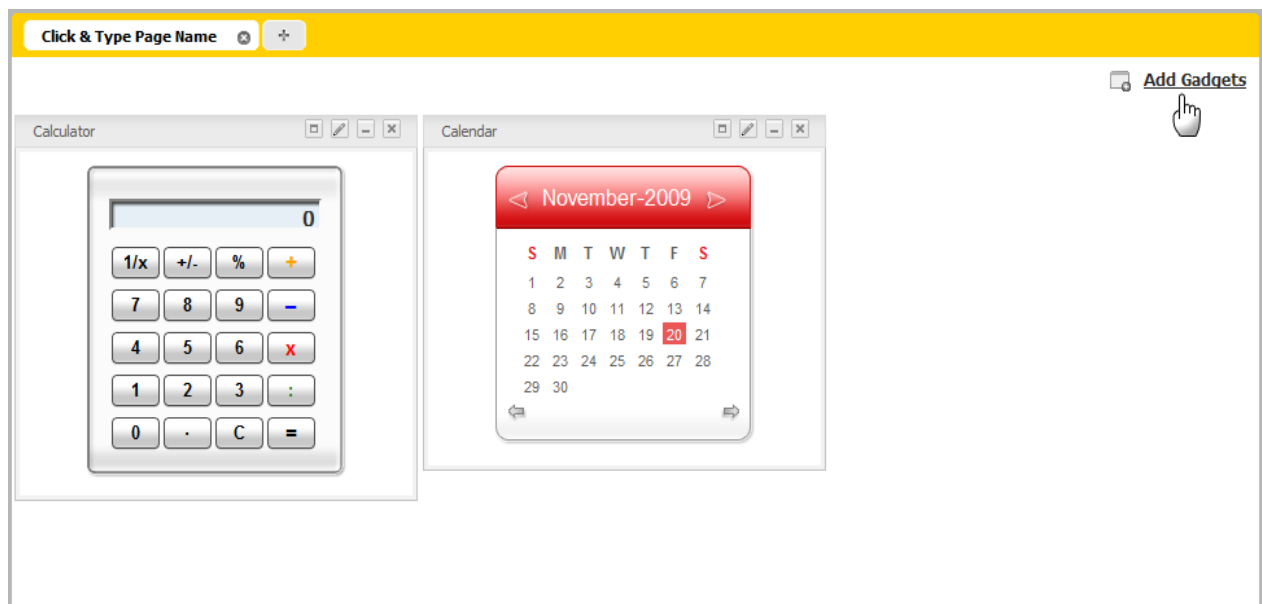
**Source:** The source code to create a new gadget. This source will be a .xml file.

**Step 2:** Enter a value for the **Source** field in this form.

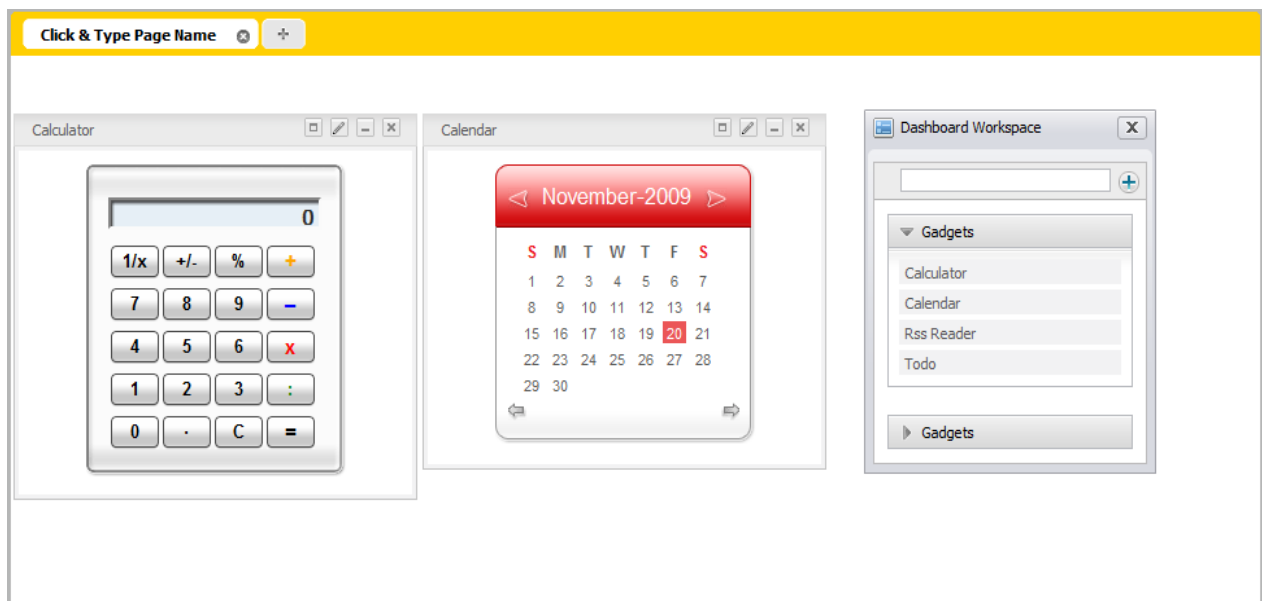
**Step 3:** Click **Save** to create a new gadget.

The created gadget will be added to the gadget list on *left pane* of the Dashboard portlet.

Furthermore, you also can add a new gadget to the gadget list of the Dashboard portlet by clicking the **Add Gadgets** link:



The form to add a new gadget will be shown:



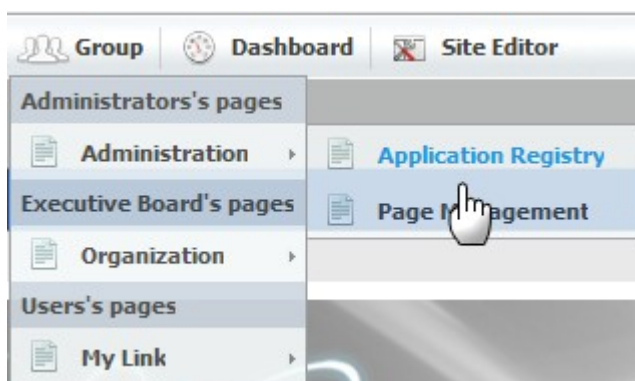
**Step 4:** Enter a link (remote or local) to a .xml file in text box at the left pane.

**Step 5:** Click  to add a new gadget to the gadget list underneath.

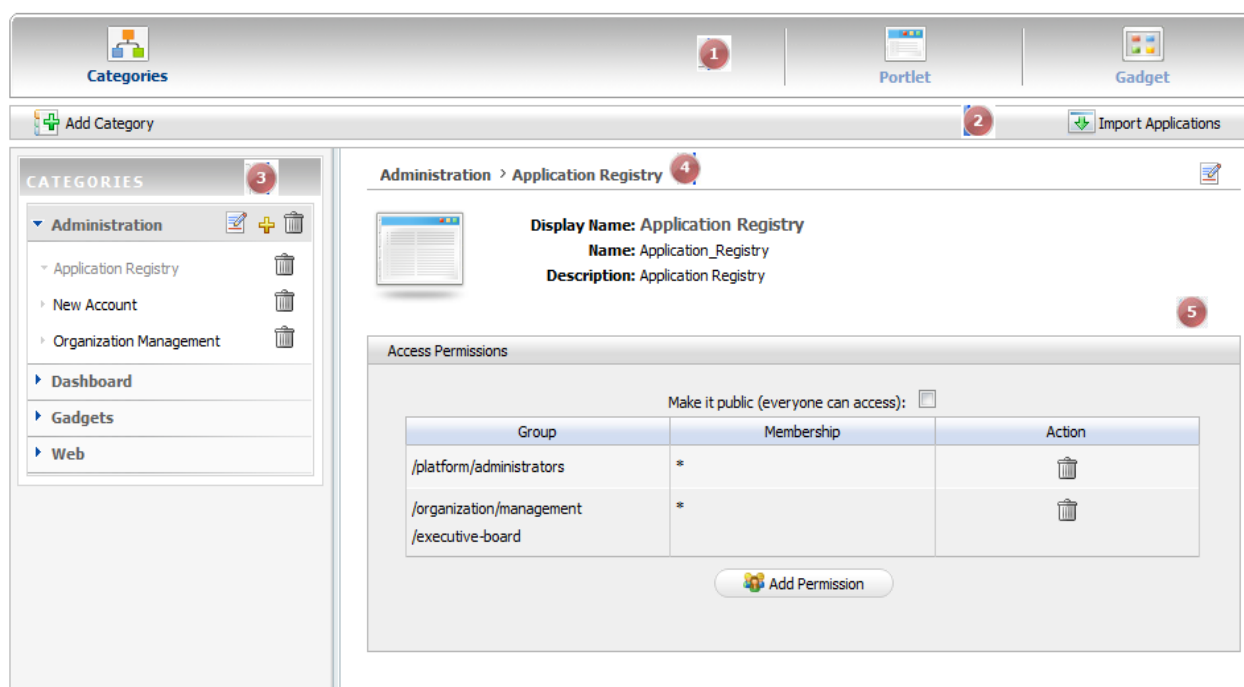
## 4.2.5 Manage categories

### 4.2.5.1 Add a new category

First, you have to go to **Administration | Application Registry** page.



The form to organize portlets/gadgets into different categories will be displayed:

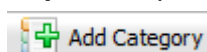


The form includes the following parts:

Indicator	Meaning
1	<b>Tab bar:</b> includes three main items.
2	<b>Action bar:</b> includes some actions related to a category.

3	<b>Left pane:</b> lists all categories and portlets in each category.
4	<b>Breadcrumb bar:</b> the path from a specific category to a specific portlet in that category.
5	<b>Right pane:</b> detail information of a specific portlet.

**Step 1:** Open a form to add a new category in the right pane by clicking



on the action bar:

The **Category Setting** tab includes common information about a category.

**Category name:**

The name of the category which you want to add. This field is required and its length must be between 3 and 30 characters.

**Display name:**

The display name of the category in list and its length must be between 3 and 30 characters.

**Description:**

The brief description of the category with any length from 0 to 255 characters.

The **Permission Setting** tab is used to set the access permission for a category.

Category Setting | **Permission Setting**

Make it public (everyone can access): ☐

Group	Membership	Action
Empty data		

Add Permission

Save Cancel

**Step 2:** Enter values for the required fields in this form.

**Step 3:** Click **Save** to accept adding a new category to the category list. The new category will be added to the list in the left pane.

#### 4.2.5.2 Set permissions for a new category

To set a permission for a new category, follow these steps:

**Step 1:** Do step 1 to add a new category.

**Step 2:** Select the **Permission Setting** tab.

**Step 3:** Check the **Make it public** check box to allow all users to access to the category. For more finer permission assignments, go to step 4.

**Step 4:** Click Add Permission to show the Group and Membership Selector form.

Select Permission

**Browse and select a group**

- Platform
- Organization
- Customers
- Partners

**Select a Membership**

- validator
- manager
- member
- \*

**Step 5:** Select a specific group on the left pane, then select a membership on the right pane (select \* to select all membership types of that group).

The selected group and membership will be shown in a table. It means all users with the membership of the selected group can access this category.

#### **4.2.5.3 Edit a category**

To edit a category in list, follow these steps:


**Step 1:** Click the edit icon  on the title bar of the category that you want to edit.

**Step 2:** Change the information of the selected category.

**Step 3:** Click **Save** to accept changes.

#### **4.2.5.4 Delete a category**

To remove a category from the list, follow these steps:

**Step 1:** Click the trash icon  on the title bar of a category that you want to delete. A confirmation message box will be displayed.

**Step 2:** Click **OK** to delete, or **Cancel** to quit.