

# User Guide

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The intended readers of this document are users using eXo Platform. This user guide explains all the basic and advanced features of eXo Platform by providing a series of in-depth examples and clear explanations which help users easily benefit from the eXo Platform capabilities and features.

This documentation is divided into the following chapters:

- **Get Started**

A list of glossaries commonly used in applications of eXo Platform, interface of eXo Platform 3.5, and how to manage your accounts and language.

- **Build Your Social Network**

Instructions on how to manage your profiles and spaces, build networks and follow activities in your network.

- **Organize Your Knowledge**

Instructions on how to perform actions in Wiki, Forum, and FAQs.

- **Collaborate With Your Colleagues**

Instructions on how to perform actions to enhance communication and collaboration through emails, address books, chat and calendars.

- **Organize Your Content**

Instructions on how to structure your content, manage content, newsletters and workflows.

- **Manage Your Organization**

Instructions on how to manage users, groups and memberships in eXo Platform.

- **Manage Your Portals**

A collection of portal-based actions, allowing you to manage permissions, sites/portals, navigation nodes, pages and applications.



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# Get Started

eXo Platform is a full-featured application for users to have many experiences in building and deploying transactional websites, authoring web and social content, creating gadgets and dashboards with reliable capabilities of collaboration and knowledge.

This chapter covers the following topics:

- **Glossary**

Terms which are commonly used in eXo Platform applications.

- **eXo Platform 3.5 interface**

Introduction to the default page of eXo Platform 3.5, and ways to enter the sample portals built in eXo Platform 3.5 before using functions.

- **Manage accounts**

How to register new accounts, sign in and out, change account settings, and retrieve your account and password.

- **Manage language**

Instructions on how to change the display language permanently and for another users.



## Note

Some accounts will not include all features stated in this guide due to limitations of user role. Check with your administrator to assure which features are enabled for your account or ask for more appropriate rights.

## 1.1. Glossary

This section provides a number of terms that you will encounter when implementing eXo Platform.

### Portal

A web-based environment which is used for aggregating and personalizing information via specific applications 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.

### Portlet

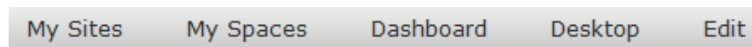
An applicative component pluggable to a portal through which users can access some specific information, including supports, updates, or mini-applications. The portlet produces fragments of a markup code that are aggregated into a portal page. Typically, a portal page is displayed as a non-overlapping 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 portlets** which support all functions of a portal. They are built into the portal and accessed via toolbar links when the portal-related tasks are performed.
- **Interface portlets** which constitute the eXo Platform interface as front-end components of the portal.

## Navigation

A node tree (so-called menus) which contains hyperlinks to other parts of a portal. The default navigation menus in eXo Platform are located in the **Administration** bar with the following navigation types:



- **My Sites:** This menu lets you access the different sites hosted by the portal. The navigation of the current portal is displayed as a sub-menu. This functionality allows different sites to individually control some portal-related aspects, such as portlets, while maintaining other content standardized with the parent portal.
- **My Groups:** This menu contains the navigations binding to groups that you belong to. When being out of the box, this menu does not appear, but a portal administrator can assign you to a functional group. It means that you are granted the access to restricted pages of this group.
  - If you are logged in as a user account, this navigation holds personal links set up by yourself.
  - If you are logged in as a manager account, this navigation contains links to pages for registered users and administrative tasks and personal links.
  - If you are logged in as an administrator account, the navigation adds further management capabilities, such as Internationalization and community management.
- **My Spaces:** This menu lets you access spaces that you created or spaces that you are a member. The navigation of a space is displayed as a sub-menu which lets you access the space's applications.
- **Dashboard:** This navigation contains links and portlets (or gadgets) selected by yourself. This user navigation is created automatically when your account registration is successful. This navigation only can be deleted when you are removed.
- **Desktop:** The desktop gives you access to applications of the portal in a free-form windowed layout.
- **Edit:** This navigation type appears when you logged in as an administrator or a web-contributor. In spaces, it also appears when you are a space manager. This navigation contains links to add new pages to a portal, to edit a page or to change the portal's layout and navigation.
- **User Menu:** The main menu (located under your display name) to change your account information, the portal language or to sign out, and more.



## Gadget

A mini web application which is run on a platform and can be integrated and customized in the website. You can add these gadgets to your dashboards by yourself.

## Modes

eXo Platform offers two access modes by default:

- **Public mode** is for guest users (visitors) who are not registered. In this mode, you are not required to sign in, but limited to public pages in the portal. After being registered successfully, you can use the private mode, but must contact the Portal administrators to get more rights or the group manager to become the member and gain the access to the 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 creating private pages, editing or deleting them, "borrowing" pages from others by creating hyperlinks, changing languages to their individual needs, managing private information.

## Permission

**Permission** settings control actions of a user within the portal and are set by the portal administrators.

- **Permission types** define what a user can do within the portal.
  - **Access permission** enables users to utilize portal content, such as signing in, viewing content, rearranging portlets. This permission can be set for multiple member groups.
  - **Edit permission** enables users to change portal content (changing portal or page information, deleting a portal/page). The edit permission is set for only one group at one time.
- **Permission levels** specify where the users' permission types can be applied in the portal.
  - **Portal:** The permission at the 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 modify any page of the portal.
  - **Page:** The permission at the 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 the 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 regular users. 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.

## Repository

A locus where content or digital data are maintained. Users can access without traveling across a network.

## Drive

A shortcut to a specific location in the content repository that enables administrators to limit visibility of each workspace for groups of users. It is also a simple way to hide the complexity of the content storage by showing only the structure that is helpful for business users.

In details, a drive consists of:

- A configured path where the user will start when browsing the drive.
- A set of allowed views that will allow the user to limit the available actions, such as editing or creating content while being in the drive.
- A set of permissions which limits the access and view of the drive to a specified number of people.
- A set of options to describe the behavior of the drive when the users browse it.

## Node

An abstract unit used to build linked data structures, such as linked lists and trees, and computer-based representation of graphs. Nodes contain data and/or links to another nodes. Links between nodes are often implemented by pointers or references.

Also, a node can be defined as a logical placeholder for data. It is a memory block which contains some data units, and optionally a reference to some other data. By linking one node with other interlinked nodes, very large and complex data structure can be formed.

### WebDAV

This term stands for Web-based Distributed Authoring and Versioning. In eXo Platform, it is used as a mean to access the content repository directly from the **Sites Explorer**.

### Postcast

An audio file which you can download and listen to on your device, such as a computer, or a MP3 player.

### File Plan

A type of document which is used for planning the primary records management. Although file plans can differ across organizations, their typical functions are to:

- Describe types of items which are acknowledged to be records.
- Describe what broader category of records to which the items belong.
- Indicate where records are stored.
- Describe the retention periods for records.
- Delineate who is responsible for managing the various types of records.

### Symlink

A special file which contains a reference to a document or a folder. By using symlinks, you can easily access specific nodes (target) to which symlinks point. In **Sites Explorer**, a symlink has a small chain symbol next to its icon.



### See also

- [eXo Platform 3.5 interface](#)
- [Manage accounts](#)
- [Manage language](#)

## 1.2. eXo Platform 3.5 interface

After starting eXo Platform 3.5 successfully, open a browser window and enter the URL provided by your administrator, for example, <http://mycompany.com:8080/portal/default>.

You will be directed to the default page of eXo Platform 3.5.

Here, you have an overview of eXo Platform through default content displayed in this page. With eXo Platform, you can do almost everything, especially building social intranets and websites. From the default interface of eXo Platform 3.5, you are provided with two sample portals of a fictitious company named "ACME" where you can discover key features and customizability of eXo Platform. Therefore, before doing any actions, you first need to go to either of the provided portals (ACME website or ACME social intranet) by clicking one of the following links:

- At the top of the default page's body:

- Or, at the bottom of default page's body:



### Note

There are also direct links to login as regular users or superusers in the sample portals.

### See also

- [Glossary](#)
- [Manage accounts](#)

- [Manage language](#)

## 1.3. Manage accounts

- [Register new account](#)

Steps to create a new account before working on eXo Palatform.

- [Sign in and Sign out](#)

Ways to sign in and sign out with your registered account.

- [Change account settings](#)

Instructions on how to change your account settings, including account profiles and password.

- [Retrieve account and password](#)

Steps to recover you username and password when you forget.

### See also

- [Glossary](#)
- [eXo Platform 3.5 interface](#)
- [Manage language](#)

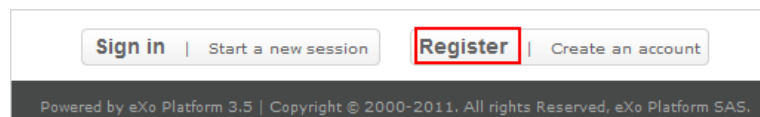
### 1.3.1. Register new account

As a guest user, you can visit eXo Platform but are limited to a lot of content and applications. To access more content or perform some actions in various applications, you first need to register by yourself and contact the portal administrator to gain certain permissions.

1. Click **Register** on the top of the portal if you are in the ACME sample site.



If you are in the ACME Social intranet, click **Register** at the bottom of the portal.




The **Create a New Account** form appears as below:

 A screenshot of the 'Create a New Account' registration form. The form includes fields for Username (filled with 'mary'), Password (masked with dots), Confirm Password (masked with dots), First Name (filled with 'Mary'), Last Name (filled with 'Smith'), Email Address (filled with 'mary@gmail.com'), and Text Validation (filled with 'dhb88'). A red box highlights the Username field, and a red arrow points to it from the text 'Check the availability of the username'. To the right of the form is a yellow information box with an 'i' icon and the text: 'Fill this form to register your user account. Then [click here to login](#)'. At the bottom of the form are 'Subscribe' and 'Reset' buttons.

### Details:



Field	Description
<b>Asterisk (*)</b>	This mark next to each field indicates that it is required to input values in this field.
<b>Username</b>	<p>The name used to log in. The username must be:</p> <ul style="list-style-type: none"> <li>• Lowercase (a - z), digit (0 - 9), underscore (_), and dot (.) characters, but consecutive underscore (_) and dot (.) are not allowed.</li> <li>• From 3 to 30 characters in length.</li> <li>• Lowercase for its first character.</li> <li>• Lowercase or digit for its last character.</li> </ul>
<b>Password</b>	The authentication string which must be between 6 and 30 characters, including spaces.
<b>Confirm Password</b>	Retype the password above. Values in both <b>Password</b> and <b>Confirm Password</b> fields must be the same.
<b>First Name</b>	The user's first name which must start with a character. Its length must be between 1 and 45 characters.
<b>Last Name</b>	The user's last name which must start with a character. Its length must be between 1 and 45 characters.
<b>Email Address</b>	<p>The user's email address that must be in the correct form, such as <code>username@abc.com</code>.</p> <p>There are two parts in the email address, called local part and domain (for example, <code>local_part@domain</code>):</p> <ul style="list-style-type: none"> <li>• Local part: Only lowercase (a - z), digit (0 - 9), underscore (_), dash (-) and dot (.) characters are allowed, and the first and last characters of this part must be lowercase or digit ones.</li> <li>• Domain: Only lowercase (a - z), digit (0 - 9), dash (-) and dot (.) characters are allowed, and the first and last characters of this part must be lowercase or digit ones. Note that the dot (.) character is required.</li> </ul>
<b>Text Validation</b>	The text to verify your registration.

2. Fill values into fields.
3. Click **Subscribe** to accept your new account, or **Reset** to clear all your entered values. If your registration is not successful, there will be warning messages which indicate invalid fields.
  - After adding a new account, you should contact your administrator to get appropriate permissions for your account.
  - Click  to check if your entered username already exists or not.



#### Note

Be sure you enter your email address carefully. Should you forget your username or password, you can recover it from this email address.

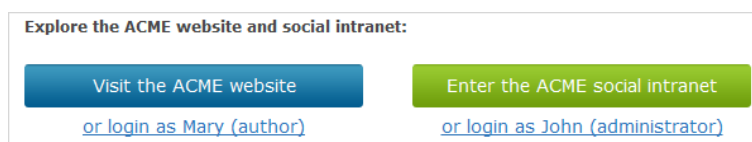
## 1.3.2. Sign in & Sign out

### Sign in a portal

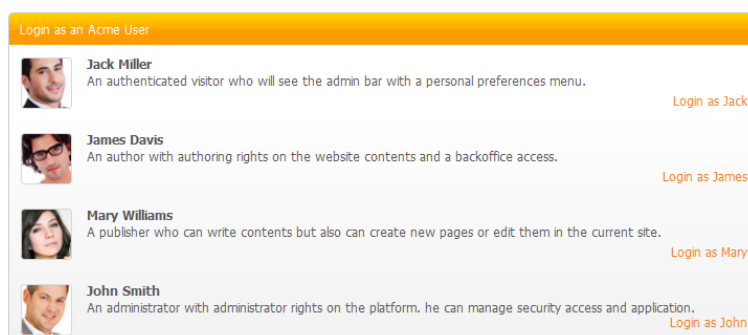
To enter the portal in the private mode, you just need to use your registered account. In eXo Platform 3.5, you can sign in the portal via two ways:

#### The first way

- Click directly one of the default user accounts at the lower of screen right in the welcome page or after entering your selected page.



- Or, after entering your selected portal, for example ACME website, click one of the default users at the bottom of body as below.



#### The second way

- Click the **Login** link to open the **Sign in** form.

- Input your registered **Username** and **Password** in the **Sign in** form.
- Select the **Remember My Login** checkbox for the first time if you want to automatically return to this portal without signing in again. This feature enables you to be automatically authenticated to avoid doing an explicit authentication when you access the portal.
- Click **Sign in** to submit the form, or **Discard** to quit.

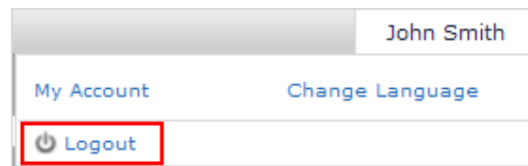


#### Note

After selecting **Remember My Login**, if you do not sign out when you leave the portal, you will be automatically authenticated for your next visit.

## Sign out a portal

This feature ends your authenticated session and returns you to the anonymous portal. To sign out, simply hover your cursor over your display name at the top right corner of the site, then select **Logout** from the drop-down menu.



### 1.3.3. Change account settings

To change your account information, hover your cursor over the account name at the top right corner of the site and click **My Account** from the drop-down menu.



The **Account Profiles** form appears.

A screenshot of the 'Account Profiles' form. The form has two tabs: 'Account Profiles' (selected) and 'Change Password'. Under the 'Account Profiles' tab, there are four input fields: 'Username' (with the value 'john'), 'First Name' (with the value 'John'), 'Last Name' (with the value 'Smith'), and 'Email' (with the value 'john.smith@acme.exoplatform.com'). Each field has an asterisk (\*) to its right. Below the input fields are two buttons: 'Save' and 'Reset'. At the bottom of the form, there is a 'Close' button.

## Change your profile information

1. Select the **Account Profiles** tab.
2. Change your **First Name**, **Last Name**, **Email**. Your **Username** cannot be changed.
3. Click **Save** to submit your changes.



### Note

The email address changed must be in the valid format. See details about the **Email Address** format [here \[6\]](#).

## Change your password

1. Select the **Change Password** tab to go to the following form.

2. Input your current password to identify that you are the owner of this account.
3. Input your new password which must have at least 6 characters.
4. Re-enter your password in the **Confirm New Password** field.
5. Click **Save** to accept your changes.



#### Note

If the default accounts' passwords have been changed, you can no longer sign in the portal by clicking the default accounts directly as stated in the [first way](#). [8]

### 1.3.4. Retrieve account and password

In case you forget your account or password, you can recover your username or password as follows:

1. Click the '**Forgot your Username/Password?**' link beneath the **Password** field when signing in.

There will be two options for you to select.

2. Select the appropriate option, then click **Next**.

You will be prompted to provide identification information, depending on your choice.

- If you select the **Forgot My Password** option, you will be prompted for your username.

- If you select the **Forgot My Username** option, you will be prompted for your email address.

3. Enter your **Username/Email** in the form above.
4. Click **Send** to submit your entered values.
  - After you have submitted the form, an email will be sent to your email address with the requested information, either your username or password.
  - If you forget your password, you will be sent a temporary password. Your original password will not be valid after this email is sent. You will be directed to a page to update your password for your next log-in.

## 1.4. Manage language

In eXo Platform, the priority order of the display language decreases to the arrow direction from left to right:

**User's language --> Cookies' language --> Browser's language --> Portal's language**

It means that the language set by the user will be at the highest level, and the portal's language at the lowest level.

Accordingly, you should pay attention to this order when selecting your preferred display language.




### Note

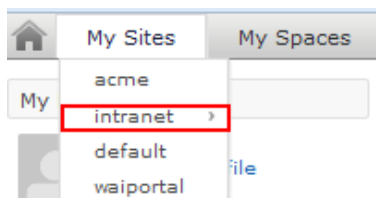
At present, eXo Platform only supports two languages: English and French.

### Change the display language permanently

eXo Platform supports 3 ways to change the display language permanently.

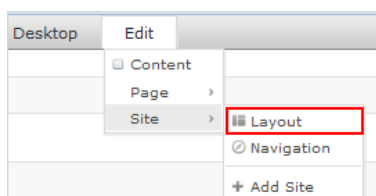
#### The first way

1. Hover your cursor over **My Sites** on the **Administration** bar and select your desired site where you want to change the display language. The currently selected site is marked with .



You will be directed to your selected site.

2. Hover your cursor over **Edit --> Site --> Layout** from the drop-down menu.













Your selected site will be displayed in the **Edit** mode.


3. Click  **Site's Config** in the **Edit Inline Composer** form. The **Site Settings** form appears.

### 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 right to access the **Organization** portlet.

1. Hover your cursor over , then select **Users --> Group and Roles** from the drop-down menu to open the **User Management** form.

User Name	Last Name	First Name	Email	Action
demo	Miller	Jack	jack.miller@acme.exoplatform	 
james	Davis	James	james.davis@acme.exoplatform	 
john	Smith	John	john.smith@acme.exoplatform	 
mary	Williams	Mary	mary.williams@acme.exoplatform	 
root	Root	Root	root@localhost	 

2. Click  corresponding to the user with the display language you want to change.
3. Select the **User Profile** sub-tab, then change the display language for this user from the **Language** field.

4. Click **Save** to accept your changes.

#### See also

- [Glossary](#)
- [eXo Platform 3.5 interface](#)
- [Manage accounts](#)

# Build Your Social Network

**Social** is an application of eXo Platform, which gives users rich experiences with many features that are similar to social networks, such as Facebook, and LinkedIn. With **Social**, you can establish more meaningful connections and improve your communication and collaboration. **Social** allows you to add details, including experiences, skills, and team information, to your own profile. Besides, **Social** supports the OpenSocial API standard that allows developers to write social gadgets intuitively and easily for displaying and mashing up activity information for contacts, applications, services and social networks.

This chapter presents the following topics:

- **Manage your profile**

Step-by-step instructions on how to build your profile with full personal information, such as contact information, work experience, current position, and more.

- **Manage spaces**

How to create/edit/join/leave/delete a space, or to view its details, or to search for spaces and to accept/deny invitations.

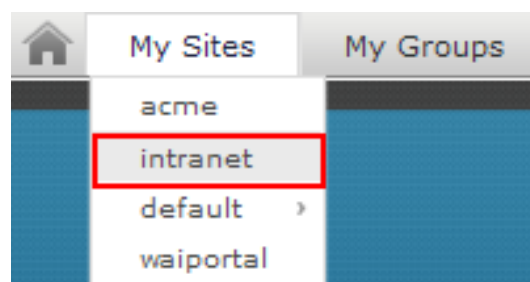
- **Manage connections**

Actions related to searching for contacts and sending connection requests.

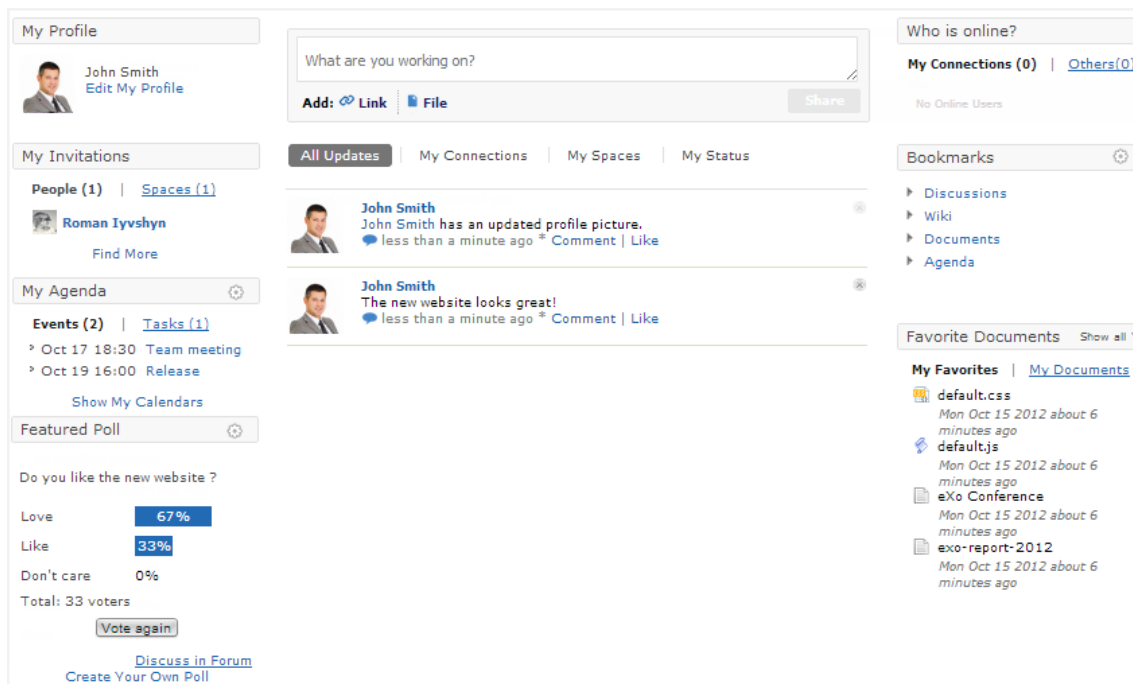
- **Follow activities in your organization**

How to update status, share links, delete activities/comments, comment on activities, or like/unlike activities.

In this chapter, most Social-related actions are demonstrated through the **Intranet** site which is a default social portal built in eXo Platform.



After entering **Intranet**, you will be directed to the **Intranet** homepage as below.



Find more information in [Intranet gadgets](#).

## 2.1. Manage your profile

- [Edit your information](#)

Steps to change your information, and details of basic information, contact and experience.

- [Upload your profile avatar](#)

Steps to upload a photo to your profile or to the spaces which you have created or have the Manage permission.

- [Update your current position](#)

Steps to update your current working position information.

By default, your profile is just initialized with the basic account information entered in the **Registration** form. Therefore, if you only want to view or edit the basic information on account and password, simply hover your cursor over your display name on the top right corner of the page, and select **My Account**.



The **Account Profiles** form is displayed with information you have set previously.



Here, you can change your account information in the **Account Profiles** tab, except for **Username**. These changes will be automatically synchronized with details in the **Basic information** in your **Profile** and vice versa. Also, you can change your password by clicking the **Change Password** tab.

If you want to view and update more details, go to the **My Profile** page by following either of 3 ways:

#### The first way

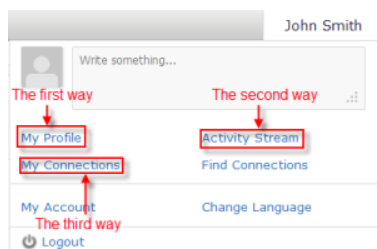
Hover your cursor over your display name at the top right corner of the page, then select **My Profile** from the drop-down menu.

#### The second way

Go to the **Activity Stream** page first, then select the **My Profile** tab in the left pane.

#### The third way

Go to the **My Connections** page first, then select the **My Profile** tab in the left pane.



The **My Profile** page is displayed that allows you to [edit your information](#), [upload your profile avatar](#), or [update your current position](#).

See also

- [Manage spaces](#)
- [Manage connections](#)
- [Follow activities in your organization](#)

### 2.1.1. Edit your information

Your own information is visible to all people using the network. You can change your information as follows:

1. Click **Edit** at the top of each corresponding section in the right pane of the [My Profile](#) page.
2. Change your desired information. In both **Contact** and **Experience** sections, click **Add** corresponding to one field you want to add more or **Remove** to delete your input information.

3. Click **Save** to accept all changes, or **Cancel** to close the **Edit** form without any changes.

The followings are changeable information in each pane.

#### Basic Information

Field	Description
<b>First name</b>	The first name which is required with the length from 1 to 45 characters.
<b>Last name</b>	The last name which is required with the length from 1 to 45 characters.
<b>Email</b>	The email address which must be in a valid format, for example, johnsmith@exoplatform.com. (See more details about the <b>Email Address</b> format <a href="#">here [6]</a> .)

#### Contact

Field	Description
<b>Gender</b>	The gender of user. Select your gender from the select box, either male or female.
<b>Phone</b>	The phone numbers at work, home or at other sites which must be from 3 to 20 numeric characters.
<b>IMs</b>	The nickname of either IM services that must be between 3 to 60 characters.
<b>Urls</b>	The website address which must be in the correct format, for example, <a href="http://exoplatform.com/">http://exoplatform.com/</a> .

#### Experience

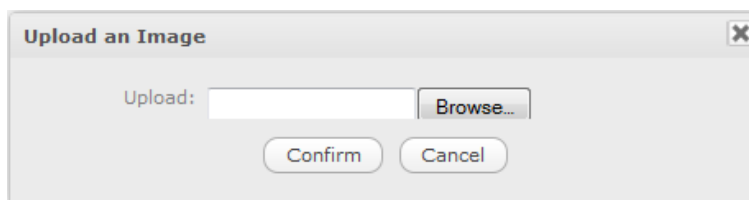
Field	Description
<b>Organization</b>	

Field	Description
	Where you have worked. The field's length is limited from 3 to 90 characters.
<b>Position</b>	The job title which is limited from 3 to 90 characters.
<b>Job Details</b>	Brief description of your job without any character-related limitations.
<b>Skills Used</b>	Skills used without any limitations.
<b>Start Date</b>	The start date of your work.
<b>End Date</b>	The end date of your work.
<b>Still in this position</b>	Indicate that you are currently at the described position.

### 2.1.2. Upload your profile avatar

You easily upload a photo to your profile or to the spaces which you have created or have the **Manage** permission.

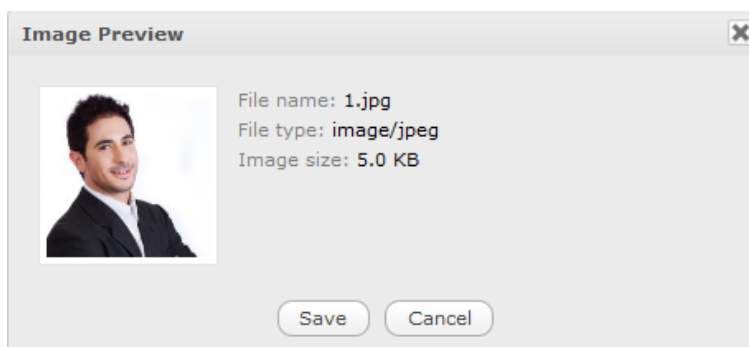
1. Click the **Change Picture** link, or directly click your current avatar in the left pane to open the **Upload an Image** form.



2. Click **Browse...** to select an image from your local device.

3. Select your desired image, then click the **Open** button or double-click the image to upload it. The uploaded image must be smaller than 2 MB.

4. Click **Confirm** to open the **Image Preview** form to see some related information, such as file name, file type, and image size.



5. Click **Save** to accept your changes.



#### Note

Your image will be automatically resized to a specified value.

### 2.1.3. Update your current position

1. Click the **Edit** link.



The form to update the current information will appear.

2. Enter your new position which is limited from 3 to 30 characters and click **Save**. Your current position will be immediately updated.



#### Note

The information entered in the **Position** field will be retrieved when you do the [Search](#) function.

## 2.2. Manage spaces

- [Create a space](#)

Steps to create a new space with new settings, permission and members.

- [Edit a space](#)

Ways to access **Space Settings** and steps to modify the space information and visibility, to manage members and space applications, or to edit space navigation.

- [Join/Leave a space](#)

Instructions on how to join/leave a space, or to revoke your request.

- [View details of a space](#)

Ways to view the detailed page of spaces where you are the member or manager.

- [Search for spaces](#)

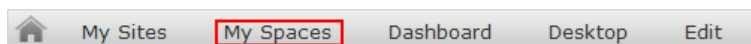
Steps to find spaces by Name and Description or Alphabets.

- [Accept/Ignore invitations](#)

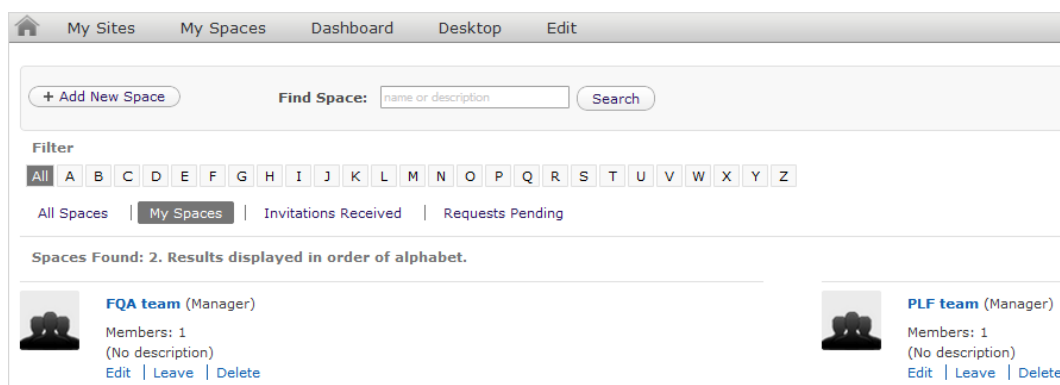
Steps to accept or ignore a request/invitation.

The "team work" concept becomes very familiar in business environment. By establishing one specific team or group, you and your collaborators can work together on important projects. Based on the importance of team working, eXo Platform develops the **Space** application, allowing you to collaborate with specific people. This means that if you want to work on a team project, you can create a space for your team members to make organizations, share links and information related to the project.

To access a space, click **My Spaces** on the **Administration** bar.



The **My Spaces** page appears as below.



The **Space** navigation includes the following tabs:

- **All Spaces**: all spaces, including your spaces, [visible spaces](#), and [hidden spaces](#) where you are invited to become members.
- **My Spaces**: spaces where you have the role as a member or a manager.
- **Invitations Received**: spaces where you are invited to become members by space managers.
- **Requests Pending**: spaces where you have requested for becoming their members.



#### Note

Administrator, who has the highest permission, can see all spaces regardless of the member role.

#### See also

- [Manage your profile](#)
- [Manage connections](#)
- [Follow activities in your organization](#)

### 2.2.1. Create a space

After redirecting to the **Space** application, you can add a new space so that you and your collaborators can work together or discuss specific topics as follows:

1. Click [+ Add New Space](#) at the left corner of the **Space** page.
2. Enter a space name, description and select the priority level in the **Settings** tab of the **Add New Space** form. There are 3 levels: **High**, **Intermediate**, and **Low** with textual explanations corresponding to each selected preference value.

**Add New Space**

Settings   Access & Edit   Invite users from group

Name  \*

Priority

(Space will be listed in the middle of the space list)

Description

Create

3. Select an access level in the **Access & Edit** tab.

**Add New Space**

Settings   Access & Edit   Invite users from group

Visibility ☒ Visible ☐ Hidden

Registration ☐ Open ☒ Validation ☐ Close

(Space membership requires validation)

Create

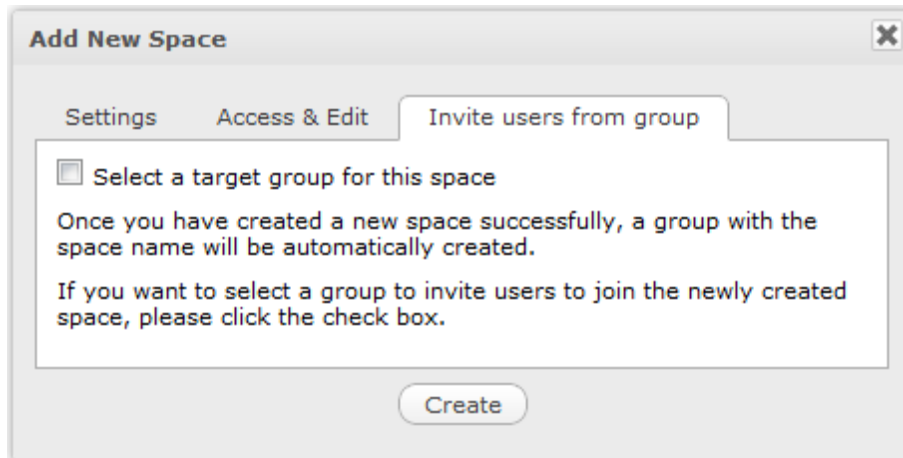
- **Visibility:** By default, the **Visibility** value is set to be **Visible**.
  - Visible: The space is always visible in the public spaces list.
  - Hidden: The space is not visible in the public spaces list.
- **Registration:** By default, the **Registration** value is set as **Validation**.
  - Open: The users sending their requests can join the space without any validation.
  - Validation: The membership must be validated by the space manager.
  - Close: The user cannot request for joining, but only the space manager can invite him.

4. Select all members of a specific group for your space where you are already 'manager' in the **Invite users from group** tab.

One of the two following cases occurs when you select this tab.

- **The first instance:** You have been already the manager of a group. It means that you have created at least a space.

The **Invite users from group** tab will be displayed as below.



**Add New Space**

Settings   Access & Edit   Invite users from group

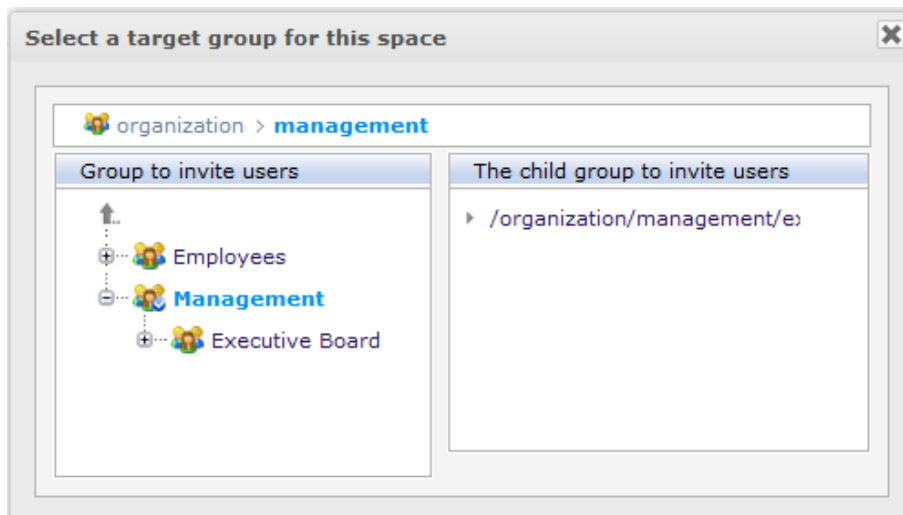
☐ Select a target group for this space

Once you have created a new space successfully, a group with the space name will be automatically created.

If you want to select a group to invite users to join the newly created space, please click the check box.

Create

- i. Tick the **Select a target group for this space** checkbox to open the selection form.
- ii. Select the group in the left pane, then its child group in the right pane.

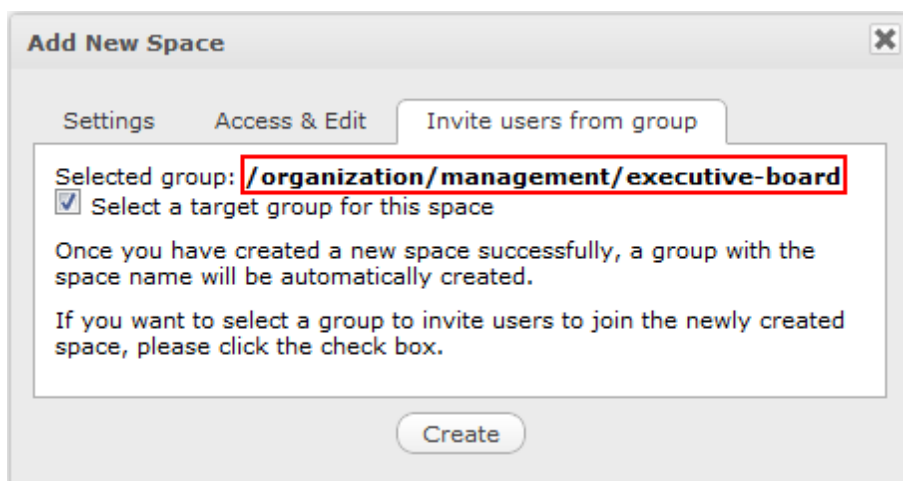


**Select a target group for this space**

organization > management

Group to invite users	The child group to invite users
<ul style="list-style-type: none"> <li>Employees</li> <li><b>Management</b></li> <li>Executive Board</li> </ul>	<ul style="list-style-type: none"> <li>/organization/management/e</li> </ul>

You will see your selected group as below.



**Add New Space**

Settings   Access & Edit   Invite users from group

Selected group: **/organization/management/executive-board**

☒ Select a target group for this space

Once you have created a new space successfully, a group with the space name will be automatically created.

If you want to select a group to invite users to join the newly created space, please click the check box.

Create

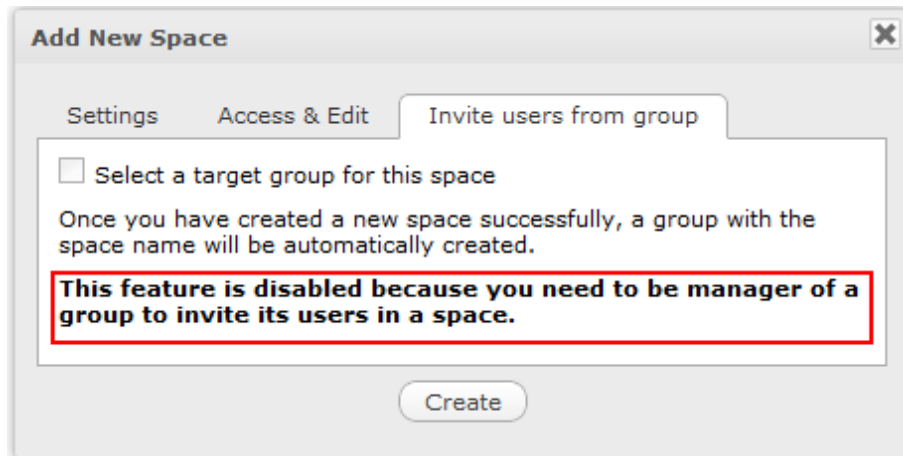


#### Note

To remove the selected groups, untick the **Select a target group for this space** checkbox.

After you have selected one existing group, all users in that group will be invited to join your newly created space.

- **The second instance:** You have not been a manager of any group yet. It means that this is the first time you create a space, so you cannot select a target group.



5. Click **Create** to finish adding your new space.

The new space appears.



- Click each application on the space **Navigation** bar to use its functions.
- When a new space is created, a forum with the same name as this space is also created in the **Forum** application. In case this forum is removed from the **Forum** application, all members of the space cannot see the space's forum anymore when clicking **Discussions** on the space **Navigation** bar.



#### Note

When more than two space characters are input between words in the space name, these spaces will be converted to ONLY ONE space when being displayed. With space characters at the beginning and end of space names, these space characters will be also omitted.

After being created, your space will be automatically added to the **My Spaces** button on the **Administration** bar. Therefore, you can access your space by clicking **My Spaces** --> **[Space Name]** from the drop-down menu.

## 2.2.2. Edit a space

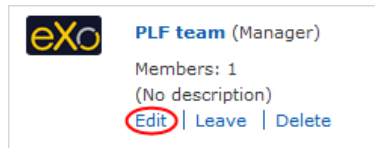
This function allows you to change the initial settings of a space if you are the creator or have the **Manage** permission on it.


To edit a space, first access the **Space Settings** by following one of 2 ways:

#### The first way

1. Click **My Spaces** on the **Administration** bar to direct to the **My Spaces** page.
2. Click **Edit** corresponding to the space which you have the **Edit** permission.






3. Click  next to the space name.


### The second way

1. Hover your cursor over **My Spaces** on the **Administration** bar, then select one space from the drop-down menu.

2. Click  next to the space name.



### Note

You only see  for spaces which you have the Edit permission.

## 2.2.2.1. Change space information/visibility

### Change space information


This function allows you to edit the basic information of a space.

1. Select the **Settings** tab in the **Space Settings** page.

 A screenshot of the 'Space Settings' page for 'exo PLF team'. The left sidebar has tabs: 'Settings' (selected), 'Access & Edit', 'Members', 'Applications', and 'Navigations'. The main area shows:
 

- A space avatar (exo logo) with a small edit icon.
- 'Name: PLF team' with a red asterisk.
- 'Description: (No description)' with a text area.
- 'Priority: Intermediate' with a dropdown menu.
- A 'Save' button at the bottom right.

2. Change information in the **Description** and **Priority** fields, and the space avatar.

- To change the space avatar, click , or directly click the current space avatar to open the **Upload an Image** form. For more details, see the [Upload your profile avatar](#) section.



### Note

You cannot change the space name.

3. Click **Save** to accept your changes.

### Change visibility

1. Select the **Access & Edit** tab in the left pane of the **Space Settings** page.
2. Change values of **Visibility** and **Registration** if you want. For more details, see [here](#).
3. Click **Save** to accept your changes.

### 2.2.2.2. Manage members

Select the **Members** tab in the left pane of the **Space Settings** page to open the **Manage members** form.

Pending	Actions
Jack Miller	<input type="button" value="Validate Invitation"/> <input type="button" value="Decline Invitation"/>


Members	Actions
John Smith	<input type="button" value="Revoke Manager"/> <input type="button" value="Remove Member"/>

Here, you can do many actions on members as follows:

#### Invite new members

You can invite other users to join your spaces as follows:

##### The first way

- If you know the username of a person, simply enter his/her username in the textbox, then click .

To invite multiple people, use commas to separate your multiple entered usernames.


##### The second way


1. Click  to open the **Select Users** form.

	Username	First Name	Last Name	Email
<input type="checkbox"/>	demo	Jack	Miller	jack.miller@acme
<input type="checkbox"/>	james	James	Davis	james.davis@acn
<input type="checkbox"/>	john	John	Smith	john.smith@acme
<input type="checkbox"/>	mary	Mary	Williams	mary.williams@ac
<input type="checkbox"/>	root	Root	Root	root@localhost

2. Select your desired users by ticking their corresponding checkboxes, and click **Add**.

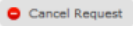
You can also search for your desired members in eXo Platform, do as follows:

- i. Enter a search term into the **Search** box.
- ii. Select a criterion you want to find in the combo box next to the **Search** box.
- iii. Click  to perform searching.

3. Click  to invite your selected users.

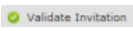

After that, you will see the list of invited users.

### Revoke your invitations

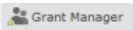
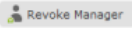
If your invited users have not accepted your requests yet, you can revoke your invitations by clicking . The users will be removed from the **Invited** list.

### Validate/Decline request

As a manager or creator of a space, you can validate other users' requests for joining your space.

- To accept a user's request for joining your space, click  in the **Action** column.
- To decline a user's request for joining your space, click  in the **Action** column.

### Promote/Demote a member

- To promote a member to the manager position, click  in the **Manager** column. The user will be automatically promoted as a manager in the current space.
- To demote a member, click .



#### Note

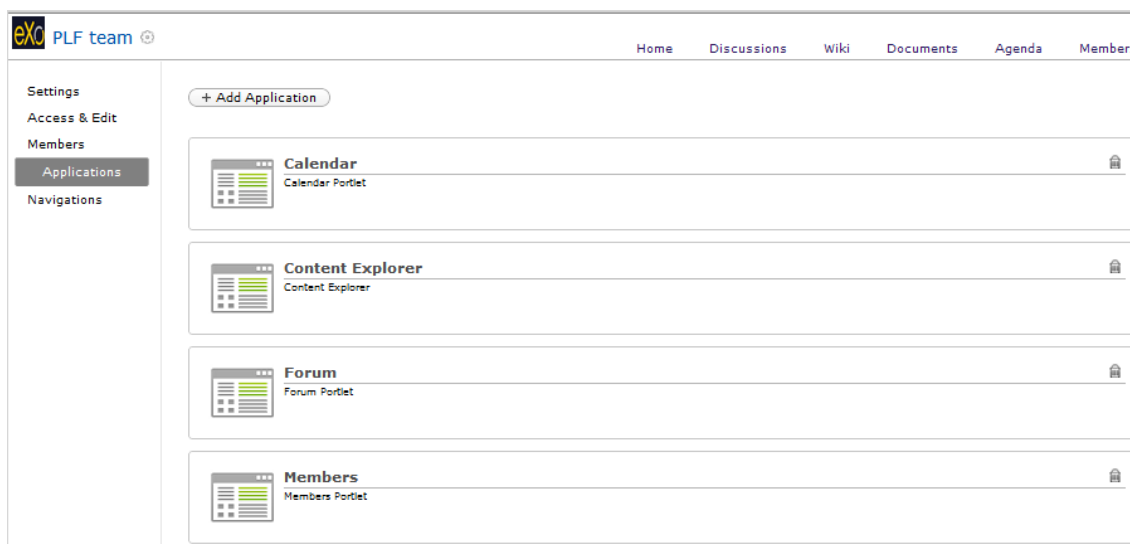
Be careful not to remove the rights for yourself; otherwise, you will not be able to edit your space's settings anymore, except that you are an administrator.

### Remove a member

Click  corresponding to the member you want to delete in the **Members** list.

## 2.2.2.3. Manage space applications

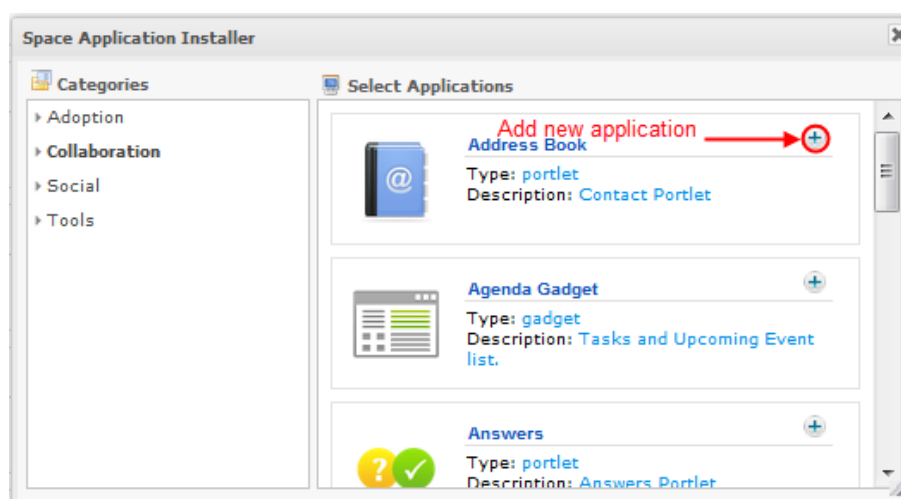
Select the **Applications** tab to go the **Applications** page which allows you to manage space applications.




Here, you can:

### Add a new space application


1. Click **Add Application** to open the **Space Application Installer** form.



2. Select the application you want to add by clicking .

If there is no available application, ask your system administrator to gain the access right.

### Delete an application

To remove an application, click  corresponding to the application name.



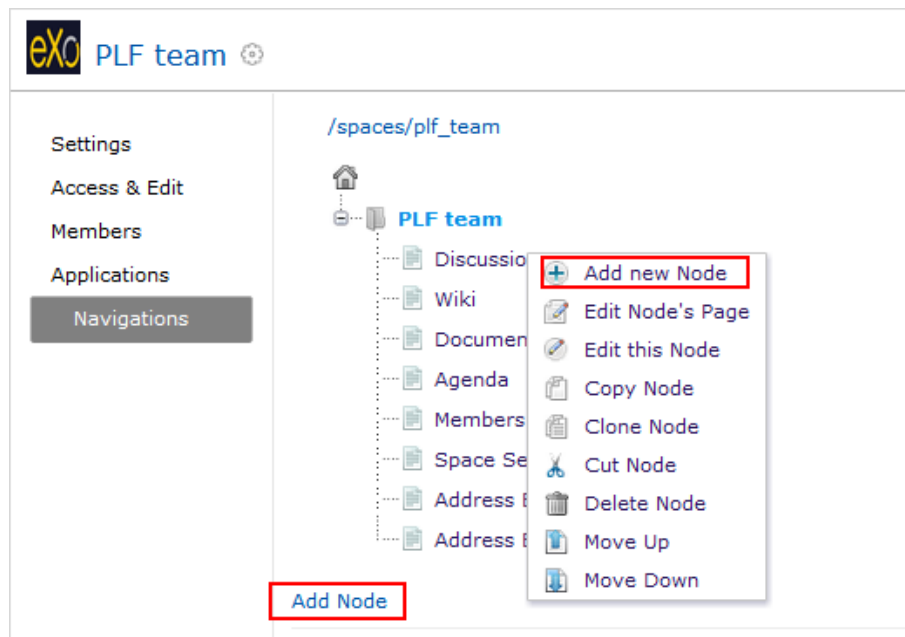
#### Note

You cannot delete the **Space Setting** application because it is configured as a mandatory space application.


### 2.2.2.4. Edit space navigation

You can easily edit a space navigation, such as adding a new node, editing a node, replacing in the navigation, moving up/down a node, and taking other actions in the context menu as follows:

1. Click the **Navigations** tab to open the space navigation.



You can take the following actions:

- Right-click a node name (space name) and take actions in the context menu, such as adding/editing/deleting a node, editing a node's page, copying/cloning a node, and more.
- Click **Add node**; Or right-click any white area to display , then select this button. The **Add/Edit Page Node** form appears and allows you to add information to your new node.

For more details, see the [Manage Navigation Nodes](#) section.

2. Click **Save** to accept all changes.

### 2.2.3. Join/Leave a space

#### Join a space

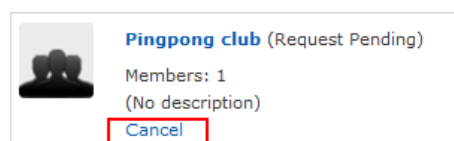
Click **My Spaces** on the **Administration** bar, then click the **All Spaces** tab to display all your spaces and ones whose **Visibility** is set to "Visible".

There are two cases to join a space:

- **The first instance:** For spaces without validation required, click **Request to join** corresponding to your desired space. You will automatically become their members.
- **The second instance:** For spaces with validation required, after clicking **Request to join**, you have to wait for the validation from the space's owner who can accept or deny your request.

#### Revoke your request

- To revoke your request for joining a space that has not been validated by its owner, simply click **Cancel**.

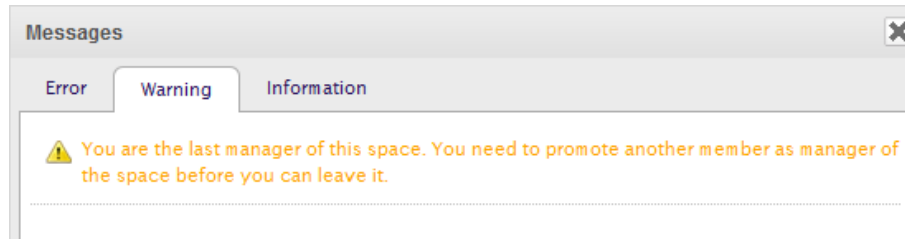


#### Leave a space

- To leave a space, simply click **Leave**.



If you are the only leader of that space, the message which informs that you cannot leave a space will appear as below.



#### Note

After you have left a space, the space will not exist in the **My Spaces** tab, but in the **All Spaces** tab (for the "visible" space only).

## 2.2.4. View details of a space

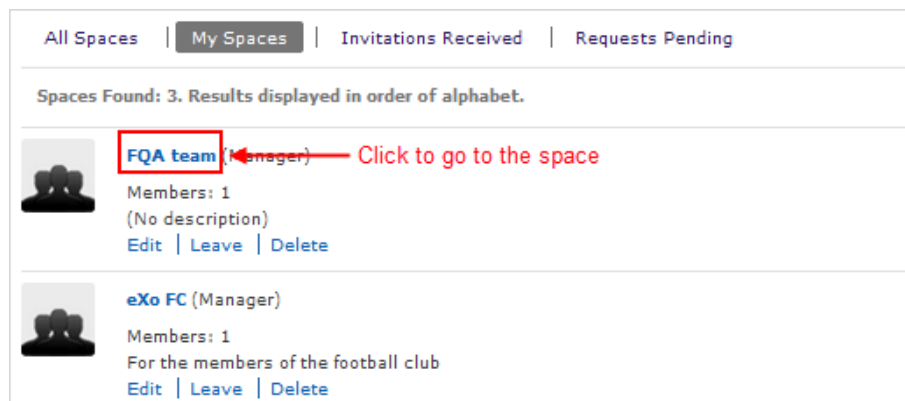
To view one detailed page of a space, you must become its member first. Then, do either of the two following ways to view the space.

#### The first way

- Hover your cursor over **My Spaces** on the **Administration** bar, and select your desired space from the drop-down menu.

#### The second way

- After entering the **My Spaces** pane within the **Spaces** application, click the name of your desired space.



The detailed page of the space displays information about the space. The functions you can perform depend on your granted permissions or whether you are the space's creator or not.

As a normal user, you can:

- [Ask for joining the public space or leaving the space.](#)
- [Accept or deny to join a space.](#)
- [Invite new members to take part in your space \[24\].](#)

Besides the actions above, as a space manager or creator, you can:

- [Edit the space settings, including description, priority level, and avatar.](#)
- [Change the visibility of your space \[24\].](#)
- [Promote/Demote roles of space members \[25\].](#)
- [Remove members from your space \[25\].](#)
- [Delete a space \[29\]](#)

### Delete a space

Only the space managers can delete their spaces by clicking [Delete](#) under the space name. All information and navigations related to that space are also deleted.

## 2.2.5. Search for spaces

The **Search** function in the **Spaces** application helps you easily find spaces from one of the tabs in the [Space navigation](#).

After accessing your desired spaces tab, you can search for spaces by **Name** and **Description** or **Alphabets**.

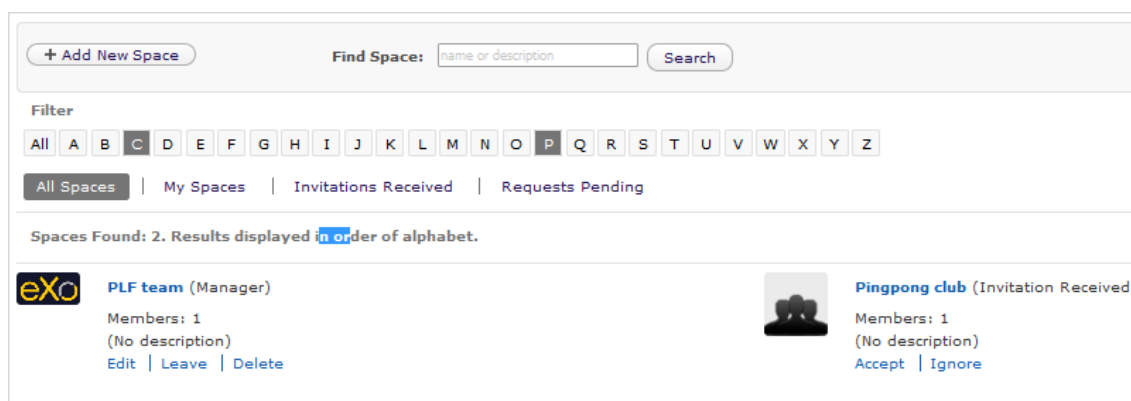
### Search by name/description

1. Enter the key word into the **Find Space** field.
2. Press the **Enter** key or click **Search**.

Only spaces whose names start with the search letter are listed in the **Found** pane.

### Search by alphabets

Simply click a specific letter.



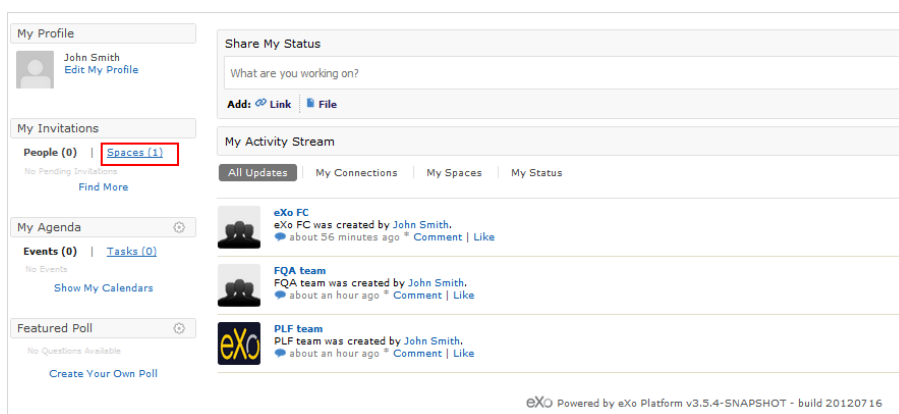
Only spaces whose names start with the search letter are listed in the **Spaces Found** pane.

## 2.2.6. Accept/Ignore invitations

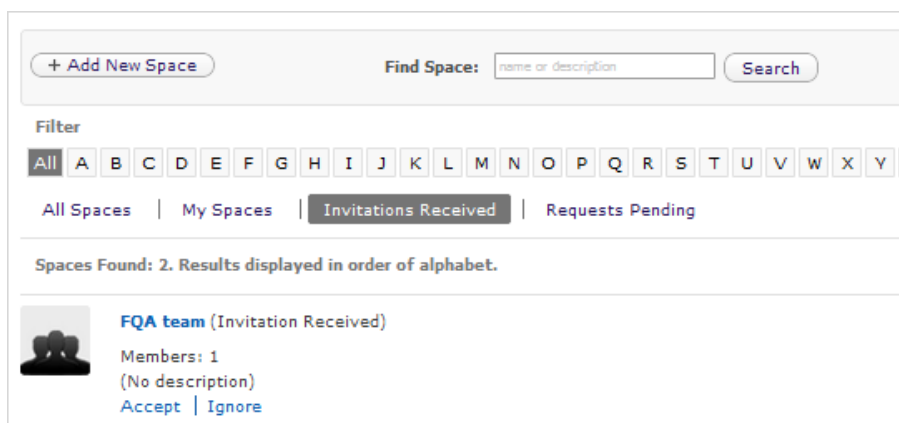
This function allows you to accept and/or deny invitations that you received from others. You can see all spaces which are being waited for your acceptance in the **Invitations Received** tab, or in the **My invitations** tab in the left pane of the Intranet homepage.

1. [Access the Intranet homepage](#), then click **Space** in the **My Invitations** tab on the left of the Intranet homepage. A list of spaces which you are invited to join appears.

A list of spaces which you are invited to join appears.



2. Click the space name to open the **Invitations Received** tab.



- Click **Accept** to accept joining the space.
- Click **Ignore** to deny joining the space.



#### Note

You can also go to the **Invitations Received** tab by clicking **My Space --> Invitations Received**.

## 2.3. Manage connections

### • Search for contacts

Steps to find your desired contacts quickly by searching by name, by role (by position, and/or work skills), and by alphabets.

### • View profiles of other contacts

Simple instructions on how to view profiles of one contact, including his/her activities and connections.

### • Send connection requests

Ways to send connection request to other people.

### • Revoke a connection request

Ways to revoke your sent request.

### • Accept/Deny a connection request

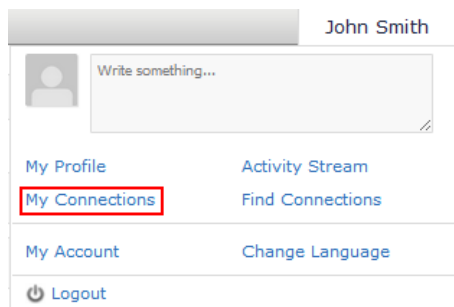
Ways to accept/deny a connection request.



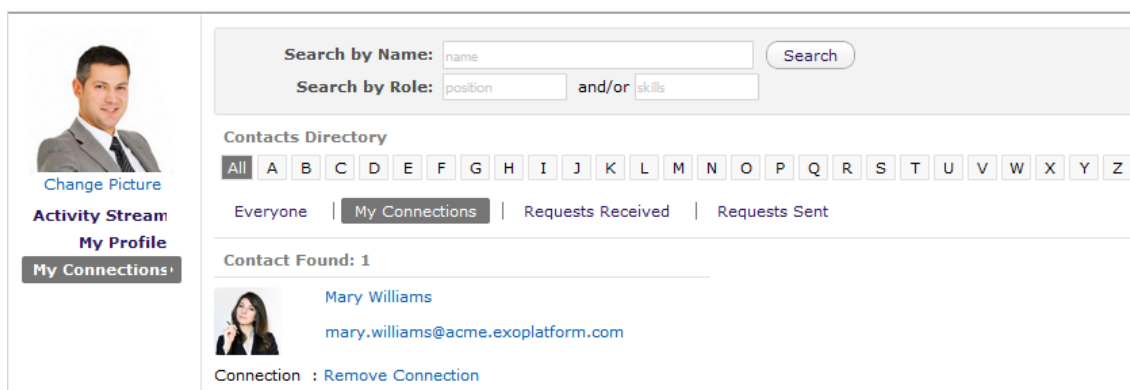
- [Disconnect from your contacts](#)

Ways to remove the connections between you and the users who are your contacts.

To build your connections, you first need to hover your cursor over the display name on the **Administration** bar and select **My Connections** from the drop-down menu.



The **Connections** page appears.



This page consists of the following tabs:

- **Everyone**: lists users who have registered in the eXo Platform system.
- **My Connections**: lists users who have established connections with you. You can remove these connections by clicking **Remove Connection**.
- **Requests Received**: lists users who have sent you connection request. You can click **Confirm** to accept being as his/her contact or **Ignore** to refuse.
- **Requests Sent**: lists users to whom you have sent connection requests. You can also click **Cancel Request** to revoke your request.

#### See also

- [Manage your profile](#)
- [Manage spaces](#)
- [Follow activities in your organization](#)

### 2.3.1. Search for contacts

This function allows you to find your desired contact quickly by searching by name, and/or searching by role (by position, and/or work skills), and searching by alphabets.

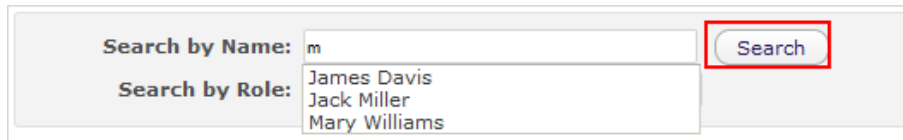
1. Select the relevant tab in which you want to do your search.

- To search across all users in eXo Platform, select the **Everyone** tab. Alternatively, you can hover your cursor over your display name and select **Find Connections** from the drop-down menu.

- To reduce the returned search results, select the appropriate tab before using the search box. For example, to search for contacts with whom you have established connections, you need to select the **My Connections** tab.

2. Select the search criteria:

- **Search by name:** Enter the contact name you want to search into the **Search by Name** field. When you type, the application automatically suggests contact names containing your entered letter. You just need to select one of suggested names from the drop-down list.



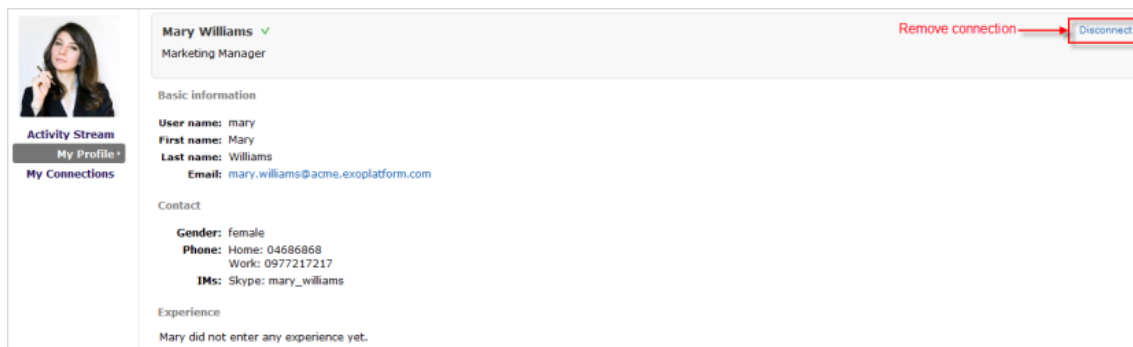
- **Search by role:** Enter the position, and/or skills of the contacts you want to search for.
- **Search by alphabets.** See details in the [Search by alphabets \[29\]](#) section. (If you search by this criteria, skip **Step 3**).

3. Hit the **Enter** key, or click **Search** to find your desired contacts. The results will be listed in the **People Found** pane.

- When searching by alphabets, only contacts whose last names start with the search letter are listed in the **Connections Found** pane.
- The search results are also ordered by the last name.

## 2.3.2. View profiles of other contacts

To view the profile of a contact, simply click the contact name. You will be directed to his/her profile.



From his/her profile, you can see all his/her activities and connections.

- To see his/her activities, click **Activity Stream** on the left pane.
- To see his/her connections, click **My Connections** on the left pane.
- To return his/her profile page, click **My Profile** on the left pane.



### Note

Regardless of being an administrator, you do not have right to edit profiles of other contacts.

## 2.3.3. Send connection requests

After [specifying your desired contact](#), you can send a connection request via one of two ways.

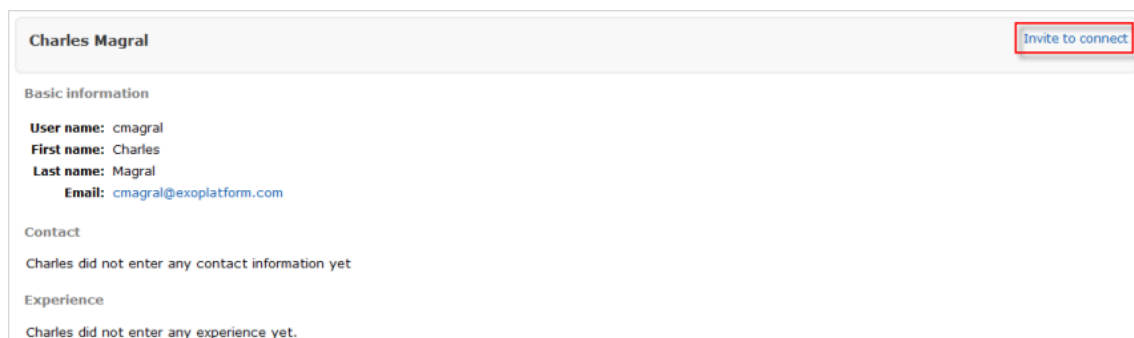


### The first way

Click **Connect** to send your connection request.

### The second way

Access the profile page of the contact to whom you want to send a connection request, then click **Invite to connect** at the right corner of the profile page.



### Note

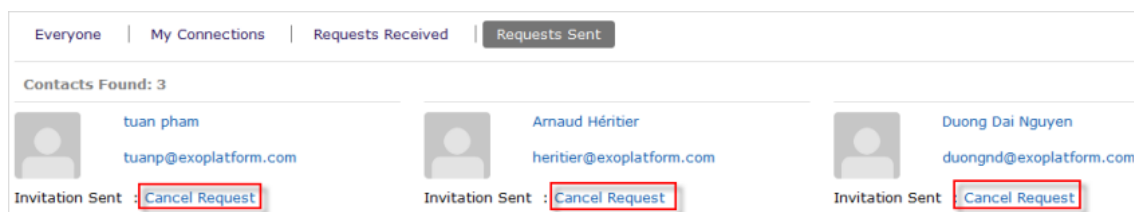
If you follow the first way, the **Connect** text will become **Cancel Request**. Meanwhile, if you follow the second way, the **Invite to connect** text will be turned into **Revoke**.

## 2.3.4. Revoke a connection request

After sending connection requests to other users, you still can remove the requests by selecting the **Requests Sent** tab and do one of two following ways.

### The first way

Click **Cancel Request** to revoke the connection request.



### The second way

Access the profile page of the contact to whom you sent a connection request, then click **Revoke** at the right corner of the profile page.

**tuan pham** Revoke

Basic information

**User name:** tuanp  
**First name:** tuan  
**Last name:** pham  
**Email:** [tuanp@exoplatform.com](mailto:tuanp@exoplatform.com)

Contact

tuan did not enter any contact information yet.

Experience

tuan did not enter any experience yet.

### 2.3.5. Accept/Deny a connection request

You can perform these actions via one of the following way:

#### The first way

Select the **Requests Received** tab to see the list of all connection requests sent to you

- Click **Confirm** to accept the request.
- Click **Ignore** to deny the request.

#### The second way

1. [Access the Intranet homepage](#) to see the list of all connection requests sent to you in **My Invitations** on the left pane.

**My Profile**

John Smith  
[Edit My Profile](#)

**Share My Status**

What are you working on?

Add: [Link](#) | [File](#) Share

**My Invitations**

**People (1)** | [Spaces \(1\)](#)

**James Davis**  
[Find More](#)

**My Agenda** Events (0) | [Tasks \(0\)](#)

**My Activity Stream**

All Updates | My Connections | My Spaces | My Status

**Mary Williams**  
 James Davis is now connected with Mary Williams.  
 less than a minute ago \* [Comment](#) | [Like](#)

2. Click the contact name in the list to go to his/her profile page.

- Select **Connect** to accept the request.
- Click **Deny** to deny the request.

### 2.3.6. Disconnect from your contacts

In the **My Connections** or **Everyone** tab, you can remove the connections between you and the users who are as your contacts via one of two following ways.

**Contacts Directory**

All | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z

Everyone | **My Connections** | Requests Received | Requests Sent

**Contacts Found: 2**

	<b>James Davis</b> <a href="mailto:james.davis@acme.exoplatform.com">james.davis@acme.exoplatform.com</a>		<b>Mary Williams</b> <a href="mailto:mary.williams@acme.exoplatform.com">mary.williams@acme.exoplatform.com</a>
Connection	<a href="#">Remove Connection</a>	Connection :	<a href="#">Remove Connection</a>

*The first way* points to the 'Remove Connection' link for James Davis.

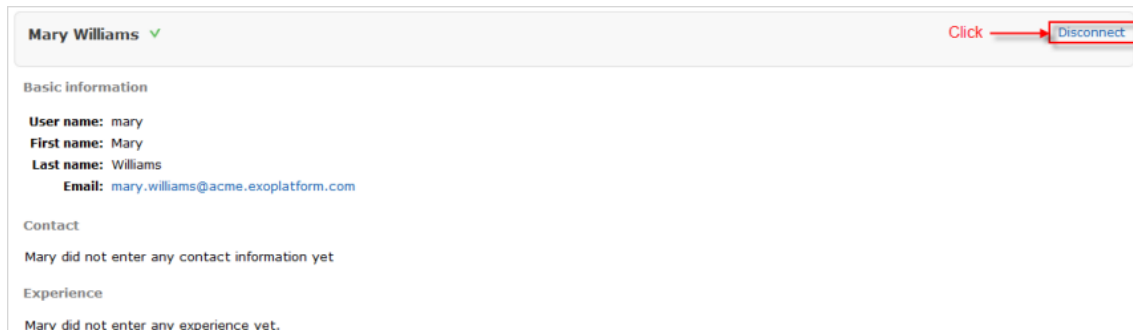
*The second way* points to the 'Mary Williams' name in the contact list.

**The first way**

Click **Remove Connection** to remove your established connection.

**The second way**

Accessing the [profile page of the contact](#) who is your connection, then click the **Disconnect** link at the right corner of the profile page.



## 2.4. Follow activities in your organization

- [Update status](#)

Ways to post your new status on **Activity Stream**.

- [Share a link](#)

Steps to add a link to your status and share it on **Activity Stream**.

- [Share a file](#)

Steps to add a file to your status and share it on **Activity Stream**.

- [Delete activities/comments](#)

Steps to remove activities or comments from **Activity Stream**.

- [Comment on activities](#)

Steps to comment on an activity that allows you to get ideas, answers, and any additional information.

- [Like/Unlike activities](#)

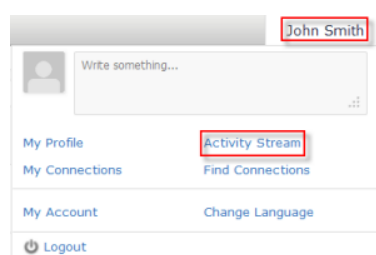
Steps to show you reaction (like/unlike) towards an activity.

- [Create rich activities with allowed HTML tags](#)

Introduction to the HTML tags which you can use to create rich activities.

All activities of a user are displayed in **Activity Stream** of a user and **Space**.

To enter the **Activity Stream** page, hover your cursor over your display name (for example, John Smith) on the **Administration** bar and select **Activity Stream**.



The **Activity Stream** page consists of the following tabs:

- **All Updates:** lists all updates of yours, of your connections, and of your spaces.
- **Network Updates:** lists all updates of users who have established their connections with you.
- **Space Updates:** lists all updates of spaces where you are a member or a manager.
- **My Status:** lists all your own activities, such as your profile updates, link updates or another activities pushed by yourself.

You can see activities of any registered people by clicking their display name to go their profile page, then select **Activity Stream** on the left pane. However, for people to whom you have not connected, you only can view their activities but cannot post any **activities, comments** or **like** on their activity streams.

In addition, you can keep track of activities of a space application. For example, whenever there is a new post in the **Forum** application, it will be updated in the activity stream.

The actions described in this section are those which you can do on activity streams of yours, of your connections or of any spaces where you are a member or manager, depending on the accessed tab.

#### See also

- [Manage your profile](#)
- [Manage spaces](#)
- [Manage connections](#)

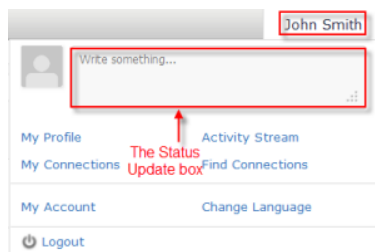
### 2.4.1. Update status

By entering your status message, you can tell people what are you doing on or ask for their helps or ideas. Thereafter, your colleagues who are connected with you can see your updates in their connections.

There are 2 ways to post your status.

#### The first way

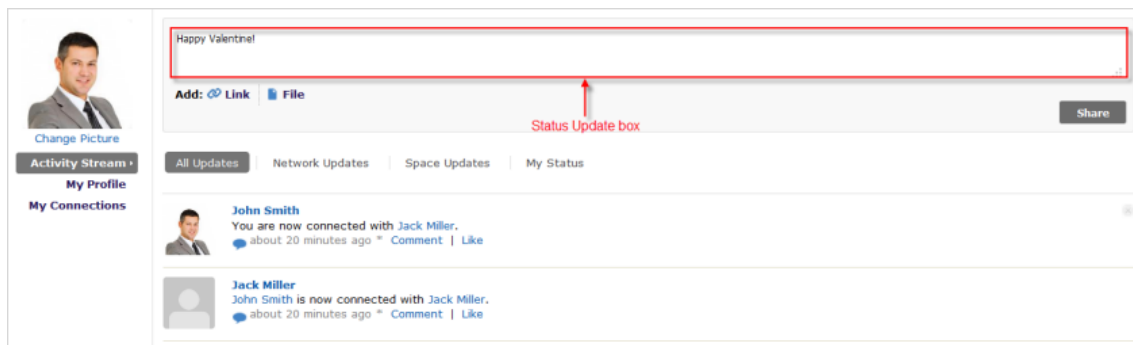
1. Hover your cursor over your display name on the right corner of the page.



2. Input your status into the **Status Update** textbox from the drop-down menu, then hit the **Enter** key to accept updating your status.

#### The second way

1. Go into the **Activity Stream** page as [here](#).
2. Enter your current status in the **Status Update** box.



3. Click **Share** to accept sharing your status.

Your new status will be updated in two tabs: **All Updates** and **My Status**.

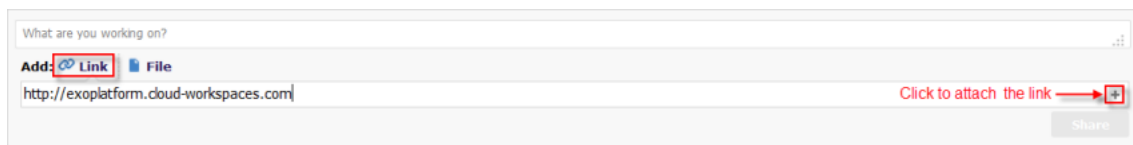



### Note

You can use some HTML tags when updating your status. See more details in the [Create rich activities with allowed HTML tags](#) section.

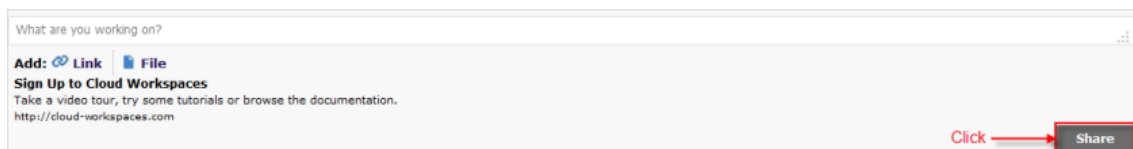
## 2.4.2. Share a link

1. Click  **Link**.



2. Enter the link and click .


If the link address is correct, it will be attached, then shown with the overall content of the link.



- If you do not want the thumbnail to be displayed, select the **No thumbnail** checkbox.
- If there is more than one thumbnail, you can click blue arrows to go through all available thumbnails.
- If you want to edit the link content, double-click the content and edit.

3. Click **Share** to share your entered link with your connections, or click  **Link** again to remove your entered link.

## 2.4.3. Share a file

1. Click  **File** to open the **Select File** box.



2. Click **Select File** to open the **Select File** form.

3. Select the relevant drive category from the **Select Drive** drop-down menu.

4. Select the folder and the server file, then click **Select** to finish uploading your selected file.




#### Note

You can also click  to select a file from your local device; Or click  to create a new folder.

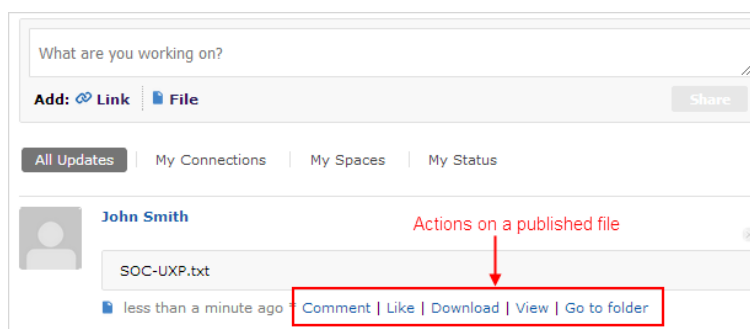
You will see your uploaded file in the **Select File** box as below.

5. Click **Share** to share your uploaded file with your connections.

- To remove your uploaded file, simply click  next to your selected file, or click  again.

The shared file is published on the activity stream.





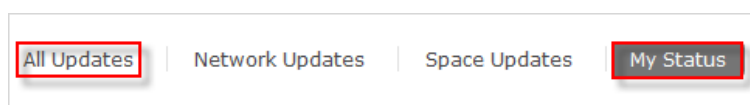
You can do some actions on the shared file as follows:

- Give your idea about the shared file by clicking **Comment**.
- Show your interest in the shared file by clicking **Like**.
- Download the published file to your local device by clicking **Download**.
- View the published file on a pop-up window by clicking **View**. You can also download it from this window.
- Navigate to the folder containing the published file in **Sites Explorer** by clicking **Go to folder**.

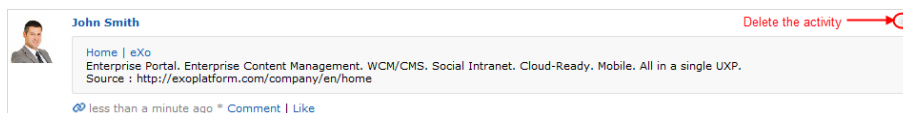
#### 2.4.4. Delete activities/comments

You are allowed to delete your activities/comments that you created, and those in your activity stream and in the space where you are the manager.

1. Select **All Updates** or **My Status** to view all your own activities.



2. Select the activity you want to delete, then click .

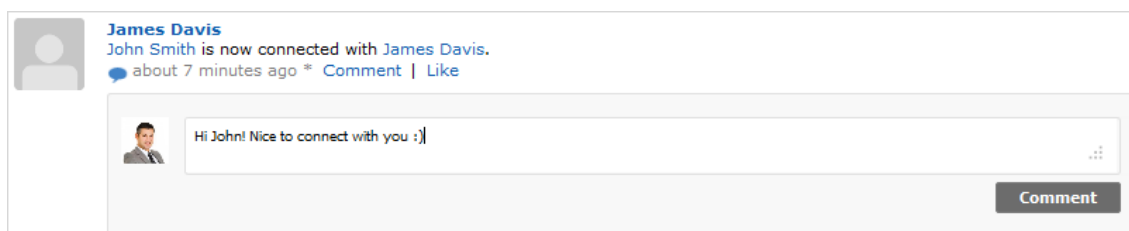


3. Click **OK** in the confirmation message to accept your deletion.

#### 2.4.5. Comment on activities

This action allows you to get ideas, answers, and any additional information when your collaborators respond to your status updates. Besides, you yourself give your ideas about any contacts' status update as follows:

1. Select an activity on which you want to comment.
2. Click **Comment** in the bottom line of the profile to open the **Comment** form.



3. Enter your comment into the **Comment** form and press the **Comment** button. Your comment will be displayed right below the profile.

Your comment will be displayed right below the profile.



#### Note

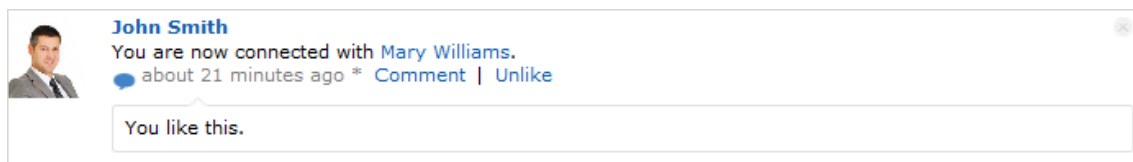
You can use some HTML tags when commenting on activities. See more details in the [Create rich activities with allowed HTML tags](#) section.

## 2.4.6. Like/Unlike activities

The function allows you to show your interest by selecting **Like** and/or **Unlike** activities.

### Like activities

1. Select the profile containing the activity you want to like.
2. Click **Like** beside the activity.



### Unlike activities

You only can **Unlike** an activity after you liked it.

1. Select an activity that you clicked **Like**.
2. Click **Unlike** beside the activity.

## 2.4.7. Create rich activities with allowed HTML tags

When updating the status or writing a comment, you can use the following HTML tags:

Tags	Description
<b>&lt;b&gt;</b>	Render as bold text. For example: <code>&lt;b&gt;Bold text&lt;/b&gt;</code>
<b>&lt;i&gt;</b>	Render as italic text. For example: <code>&lt;i&gt;Italic text&lt;/i&gt;</code>
<b>&lt;a&gt;</b>	Refer to an external link by using the <i>href</i> attribute. For example: <code>&lt;a href="http://cloud-workspaces.com"&gt;Cloud Workspace&lt;/a&gt;</code>
<b>&lt;span&gt;</b>	Group inline-elements in a document.
<b>&lt;em&gt;</b>	Render as emphasized text. For example: <code>&lt;em&gt;Emphasized text&lt;/em&gt;</code>

Tags	Description
<b>&lt;strong&gt;</b>	Render as strong (highlighted) text.
<b>&lt;p&gt;</b>	Define a paragraph.
<b>&lt;ol&gt;</b>	Define an ordered list. An ordered list can be numerical or alphabetical.
<b>&lt;ul&gt;</b>	Define an unordered or bulleted list.
<b>&lt;li&gt;</b>	<p>Define a list item. The &lt;li&gt; tag is used in both ordered (&lt;ol&gt;) and unordered (&lt;ul&gt;) lists.</p> <p>For example:</p> <pre>&lt;ul&gt; &lt;li&gt;Bullet 1&lt;/li&gt; &lt;li&gt;Bullet 2&lt;/li&gt; &lt;/ul&gt;</pre>
<b>&lt;br&gt;</b>	Insert a single line break.
<b>&lt;img&gt;</b>	<p>Define an image in an HTML page. The &lt;img&gt; tag has an required attribute named <i>src</i> which specifies the URL of the image.</p> <p>For example:</p> <pre>&lt;img src="http://t2.gstatic.com/images?q=tbn:AND9GcR59KE-1tJTWbaNBpB3K_uOJYMGE0HaQ0x4htrm8DML6lUj90t4" /&gt;</pre>
<b>&lt;blockquote&gt;</b>	Define a long quotation.
<b>&lt;q&gt;</b>	Define a short quotation.



# Organize Your Knowledge

In eXo Platform, you can manage your knowledge base easily through the **Knowledge** application. **Knowledge** includes 3 main portlets: **Forum**, **Answers** and **Wiki**. With **Knowledge**, you can share information, seek supports throughout helpful answers and post your ideas.

This chapter covers the following topics:

- **Build a wiki**

The **Wiki** application provides the content productivity to portal users as a tool to forge the unstructured knowledge. With **Wiki**, you can create and edit pages by using a simplified markup language or a WYSIWYG editor. Also, your company can use **Wiki** as an internal reference, such as work policy or a public wiki for a comprehensive product information. **Wiki** along with **Answers** and **Forum** will complete the ideal combination that helps users enhance their experiences on collaboration activities and build valuable knowledge center for clients.

- **Build a forum**

The **Forum** application is designed for the group discussion and user-generated content in which participants with common interests can exchange their opinions on a subject. While **Answers** is an ideal site for you to find answers quickly, **Forum** gives deep discussion through your posted topics.

- **Build an Answers & FAQs system**

The **Answers** application is a collaborative Question & Answer system similar to Yahoo! Answers or StackOverflow.com but for your own enterprise, where the collaboration is encouraged. With this application, you and your collaborators can post a series of common questions and find answers on a specific topic. Here, you can edit questions, provide answers and edit them. **FAQs** takes this content as input and publishes it in a clean and quickly browsable manner. You can point a **FAQs** portlet to one or several **Answers** categories. As a publishing portlet, it is impossible to edit questions and answers in **FAQs**.

## 3.1. About user roles

In the **Knowledge** application, each user group has different privileges to perform actions. Some actions can be limited to some specific user groups. Advanced users have the ability to control and assign functions or features that other users can and cannot do within the application. There are five user groups: administrator, moderator, regular user, banned user and guest.

- **Administrator** is an advanced user, who typically has the highest right when using Knowledge. The Administrator can manage user privileges and he has rights to perform all possible capabilities. For example, in Forum, an administrator can create categories, close/delete, lock/unlock forums; promote a regular user to moderator or create a category that is restricted to a specific user group.
- **Moderator** obtains a subset of administrator's rights. It means that he has certain allowed capabilities and may perform these advanced actions in a specific area only. For example, a moderator of a category in Forum can only perform advanced actions in the category that he is assigned as the moderator. The moderator role is assigned by the administrator.
- **Regular user** is defined as a logged-in user who can only use the basic features of Knowledge. The regular user can be promoted to the advanced user by the administrator.

- **Banned user** is a regular user, that abuses the forum functions or violates the forum rules and policies, cannot use the basic features of Knowledge. The role of the banned user is similar to an anonymous user's.
- **Guest** (anonymous user) is an unregistered/unlogged-in user who is often limited to a very few features only of Knowledge. For instance, a guest can view topics in Forum but he cannot reply or create new topics.

Notice that there will be no section dedicated to anonymous users. You can refer to the table that summarizes all the actions that different user roles can perform in each application.

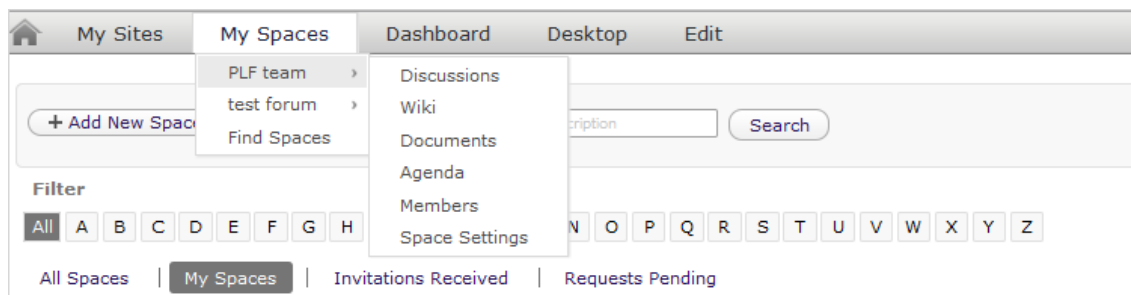
#### See also

- [Access Knowledge applications](#)
- [Build a wiki](#)
- [Build a forum](#)
- [Build an Answers & FAQs system](#)

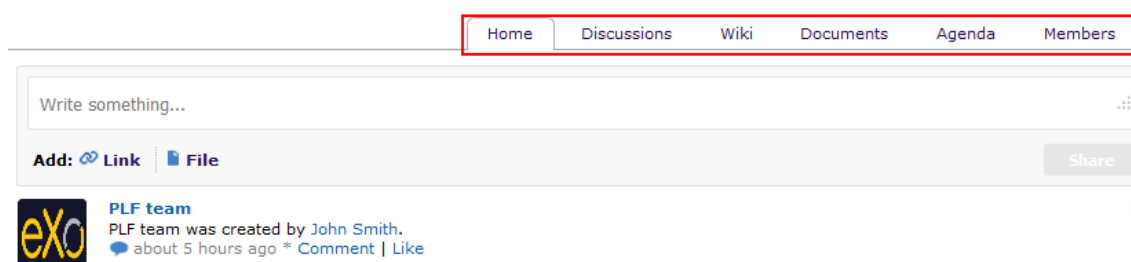
## 3.2. Access Knowledge applications

There are 2 ways to access either of the Knowledge applications of a space:

Hover your cursor over **My Spaces** --> **SpaceName**, then click the application that you want to access.



Or, hover your cursor over **My Spaces**, then select your space name and click the application name on the Space navigation.



#### Note

In case you do not see the **Forum**, **Answers** or **Wiki** applications, it means that they are not activated or not added to the current page or space. To use these applications, you need to add them to a page by dragging and dropping them from **Page Editor/Edit Inline Composer** --> **Applications** --> **Collaboration** --> **Forum/Answers/Wiki** to the main page. This can be done when [creating a new page](#), [editing an existing page](#), or [editing the layout of a portal](#). You can also configure the portlets as in the [edit a specific portlet](#) section.

#### See also

- [About user roles](#)
- [Build a wiki](#)

- [Build a forum](#)
- [Build an Answers & FAQs system](#)

### 3.3. Build a wiki

- [Work with Wiki pages](#)

Steps to perform actions on a Wiki page, including: creating, editing, moving, deleting, viewing page information and watching a page.

- [Work with attachments](#)

Instructions on how to perform actions related to attachments: viewing all attachments in a page, adding attachments, and inserting images.

- [Use the WYSIWYG Editor \(Rich Text editor\)](#)

Introduction to the **WYSIWYG** editor that allows you to edit a wiki page using the **Rich Text** editor.

- [Syntax Help](#)

Introduction to the **Syntax Help** feature of Wiki.

- [Work with Macros](#)

Steps to use Macros to apply extra formatting, functionality and customization to your content.

- [Work with page versions](#)

Introduction to the **Page History** view, and steps to view versions of a page, compare different versions of a page, or restore pages to a version.

- [Work with Spaces](#)

Introduction to the permanent bookmarkable URLs to all wiki pages.

- [Search](#)

Steps to do **Quick Search** and **Advanced Search** supported in the **Wiki** application.

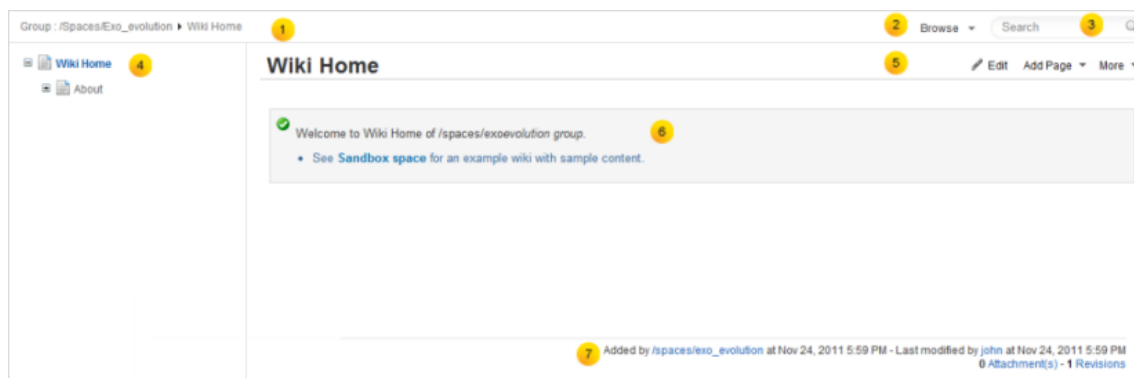
- [WebDAV support in Wiki](#)

Introduction to the **WebDAV** support in **Wiki**, steps to access your workspace and to edit a page by using **WebDAV**.

- [Wiki Administration](#)

Steps to change Space settings and manage Permissions that are for administrators only.

This section provides you with instructions on how to use all **Wiki** features and configure the **Wiki** application to make it work in your desired way. Before going further, you should know some basic concepts about **Wiki** through [accessing the Wiki application](#). You will be directed to the **Wiki** homepage as below:



**Details:**

Item	Description
1	The <b>Breadcrumb</b> which shows the page hierarchy.
2	The Wiki administration area which allows administrators only to configure the space settings.
3	The <b>Search</b> box.
4	The pages tree view.
5	The <b>Page Control</b> area which helps users take actions with the current page.
6	The page content.
7	The page information. Click <b>View Change</b> to see changes in the latest versions. Click <b>Attachment(s)</b> and <b>Revisions</b> links to open the <b>Attachments</b> details pane and the <b>Revisions</b> pane respectively. These two panes can be collapsed by clicking the relevant links again.

### Page hierarchy in Wiki

The **Wiki** content is organized as a page tree in which each page may contain many sub-pages. The hierarchy is reflected on UI by the **Breadcrumb** and the page tree in the left pane. When a page is added, it is always defined as a sub-page to the current one. You can have wikis for portals, wikis for groups or users.

### Wiki Spaces

Space is a set of pages, so the spaces partitioning means that spaces are independent trees. This separation enables **Wiki** to provide knowledge spaces for different groups.

There are 3 space types:

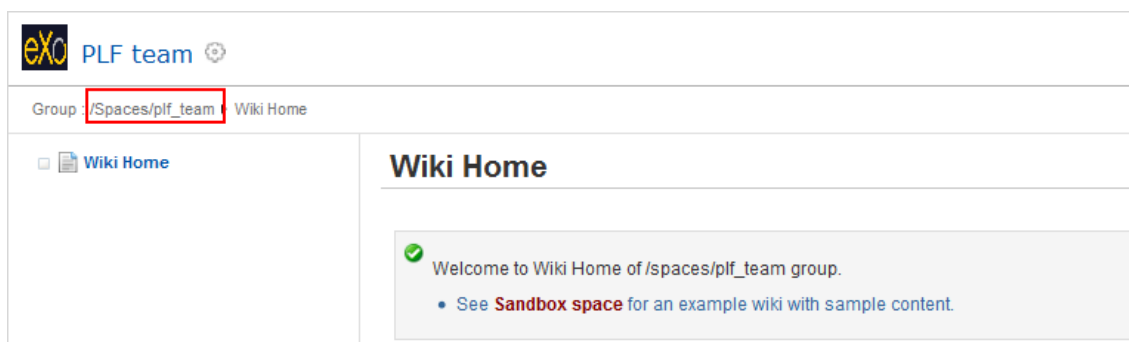
- **Portal wiki**: The global wiki of a portal.

A portal wiki is published for every user who can access that portal.

- **Group wiki**: The wiki of a space.

A group wiki can be understood as a space wiki. The wiki application of a space works as a group wiki for that space ("[/Spaces/name\\_of\\_space](#)" group). The group wiki can be accessed by members of that group.

For example:

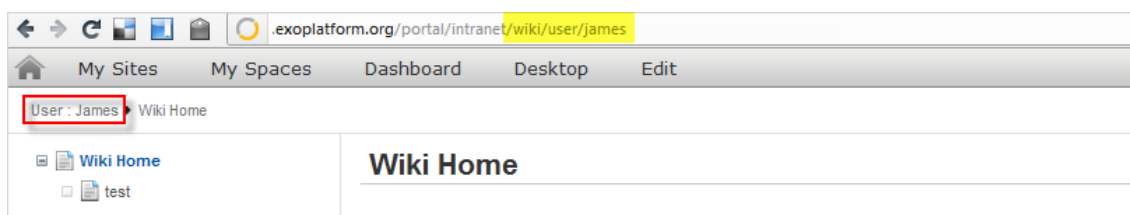


- **User wiki**: The wiki of an individual user.

Every user has his own wiki. The URL to an user wiki is in the following format: [.../wiki/user/name\\_of\\_user](#).

For example:





### Note

In this document, Spaces are referred as wikis, particularly portal wikis, group wikis and user wikis. Any space which has an implicit root page is named Wiki Home.

### See also

- [About user roles](#)
- [Access Knowledge applications](#)
- [Build a forum](#)
- [Build an Answers & FAQs system](#)

## 3.3.1. Work with Wiki pages

Pages are places where information in **Wiki** is stored and shared. Pages are stored within a space. Actions that a user can perform on a specific wiki page depends on permissions assigned by the administrator. See the [Page Permissions](#) for detailed permissions.

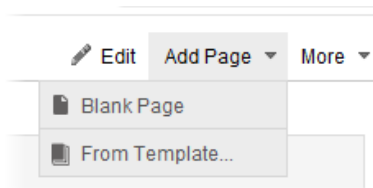
### 3.3.1.1. Create a page

There are two ways to create a page:

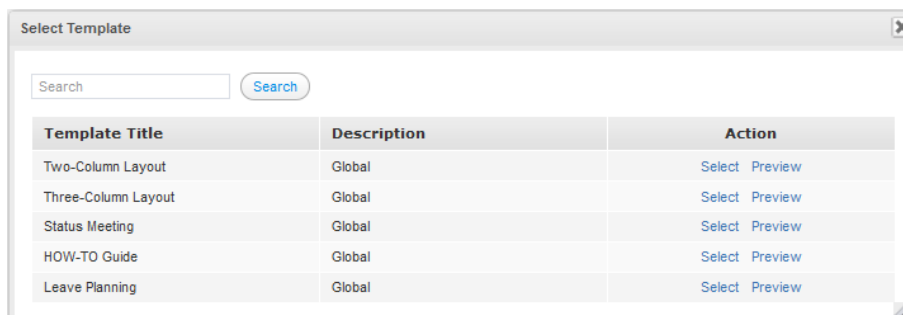
#### The first way

In this way, you need to use the toolbar.

1. Go to a Wiki space in which you want to create a page.
2. Click **Add Page**, then select **Blank Page** or **From Template...** to add a page with a template.

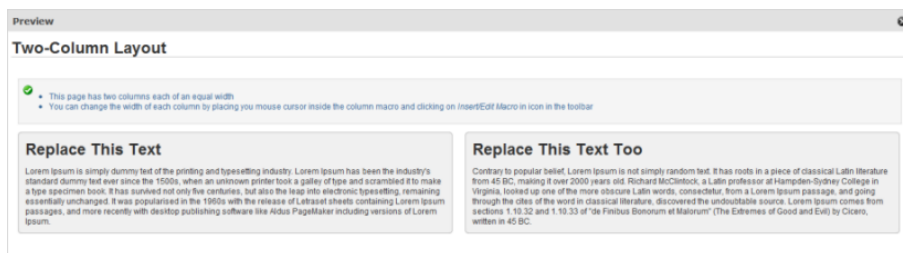


If you select **From Template...**, a list of available templates will appear.

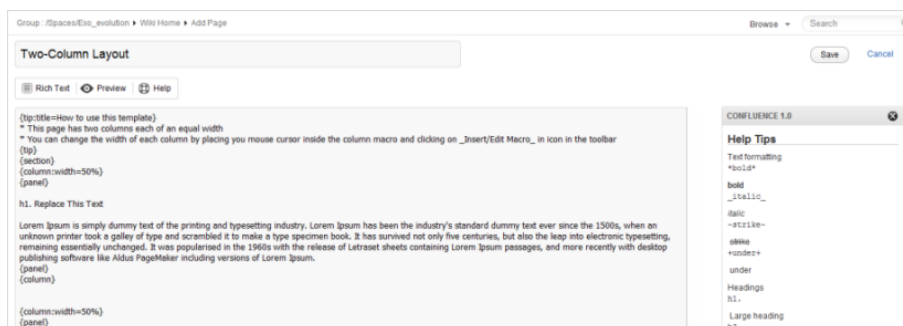


You can:

- i. Click **Preview** corresponding to the template you want to see. The template preview appears.



- ii. Click **Select** corresponding to the template you want to select for your new page. The selected template appears.



3. Enter the title for your page. The page title must be unique.
4. Enter the content of your page by using **Wiki Markup** or the **WYSIWYG** editor.
5. Click **Preview** if you want to see how your page looks like.
6. Click **Save** to finish.

### The second way

In this way, you need to use the undefined link in a page.

In the **Wiki** application of eXo Platform, you can add a link pointing to a page which you are going to create later. Such links are called undefined links. These links are often used to remind other **Wiki** users to create the page.

#### Add an undefined link for creating a page later

1. Add a link by typing the page title between square brackets '[... ]' into your page body.

For example:

What you type	What you get
[eXo User Guide]	<u>eXo User Guide</u>

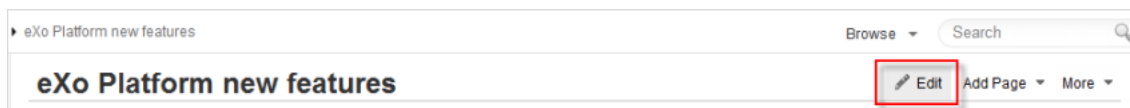
2. Click **Save** to save the page containing the link. The undefined link is underlined.
3. Click this link to open the **Add Page** form.
4. Follow the steps stated [above](#) to enter the page title, content and save the page.

### 3.3.1.2. Edit a page

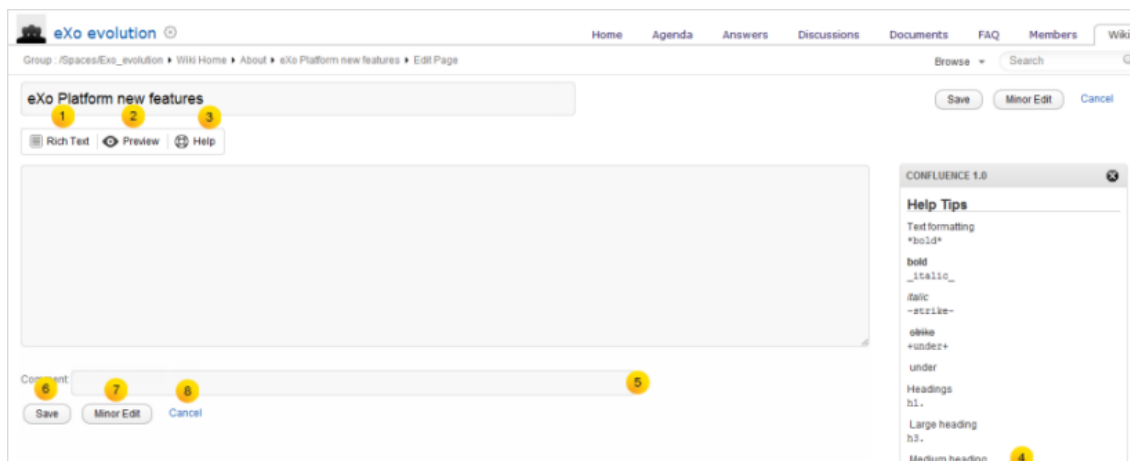
You can edit a page at any time if you have the **Edit** permission on that page.

#### Edit the whole page content

To edit the whole page content, click **Edit** in the **Page Control** area. Your page will be switched to the **Edit** mode.



Now, you can rename the page and edit the page content. In the **View** mode, hover your cursor over the page title and double-click to edit it. The toolbar in the **Edit** mode will be changed to activate the following actions.

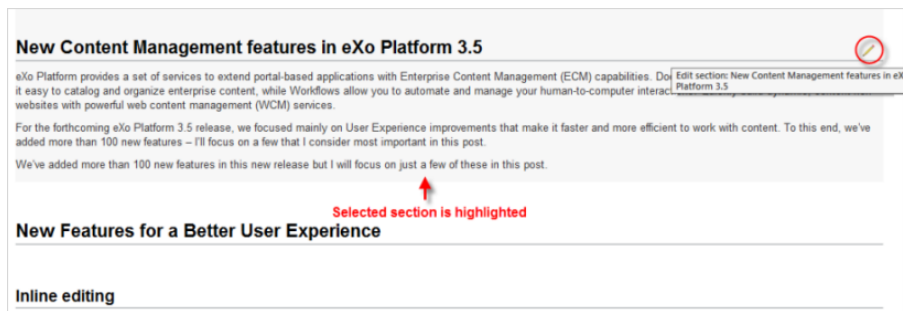


#### Details:

Item	Description
1	Switch to the <b>Rich Text (WYSIWYG)</b> editor.
2	Display the preview mode of the currently edited content. Previewing a page helps you verify the result of rendering the markup you just entered without saving.
3	Open the Wiki syntax help pane.
4	Show more syntax help.
5	Input the edit reason if necessary.
6	Save the current page and go back to the view mode. Changes will be sent to watchers via mail notification.
7	Save the current page without sending notification to the watcher.
8	Discard the current changes and go back to the <b>View</b> mode.

#### Edit a page section

To edit only a section in the whole page content, hover your cursor over the title of the section you want to edit, then click .



The selected section will be switched to the **Edit** mode.

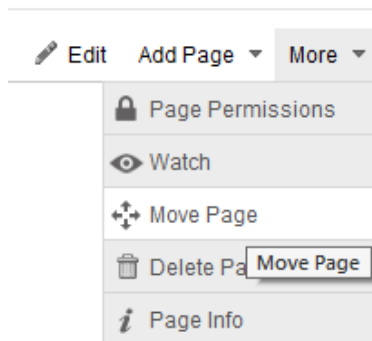


#### Tip

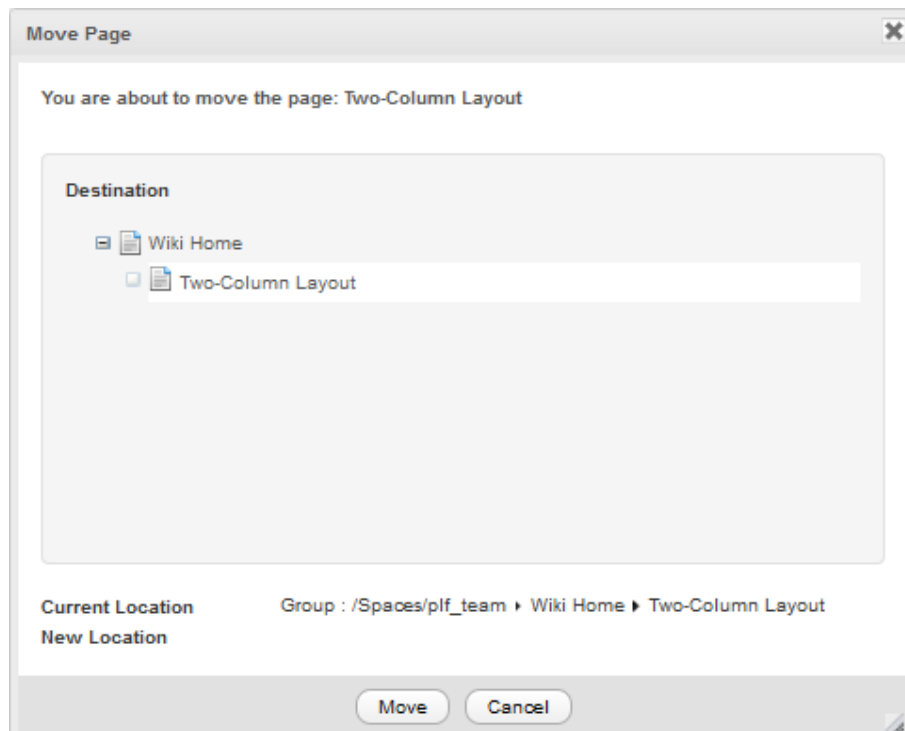
In the **View** mode, you can quickly edit the page title by double-clicking it, then press **Enter** when finishing.

### 3.3.1.3. Move a page to another location

1. Select a page that you want to move.
2. Click **More** in the **Page Control** area, then select **Move Page** from the drop-down menu.



The form to select the destination page appears.



3. Select the destination page.

4. Click **Move**.

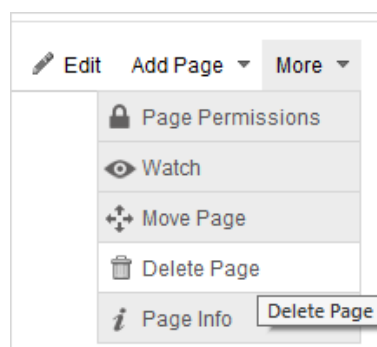


#### Note

The **Move page** action is not displayed when you are at the Wiki Home. You can only move pages inside a wiki space and not between spaces.

### 3.3.1.4. Delete a page

1. Open the page you want to delete, then select **More** in the **Page Control** area.



2. Click **Delete Page** from the drop-down menu.

3. Click **OK** in the confirmation message to accept your deletion.



#### Note

The **Delete page** action is not displayed when you are in the Wiki Home.

### 3.3.1.5. View page information

Viewing page information is accessible to users who have the View permission on that page. The page information provides details about related pages of the current page, the hierarchy structure of the current page, the page history, and more.

1. Select the page you want to view the information.
2. Click **More** from the page toolbar, then select **Page Info** from the drop-down menu.

All information of the opening page, including page summary, related pages, page hierarchy, recent changes will be displayed.

Summary		
Title	Wiki Home	
Author	intranet	Jul 19, 2012 5:20 PM
Last	john	Jul 19, 2012 5:20 PM
Changed by		

Related Pages		
Wiki	Related Pages	Actions
<input type="button" value="Add More Relations"/>		

Hierarchy	
Child Pages	

Recent Changes	
Time	Editor
CURRENT (v. 1)	john
<a href="#">View Page History</a>	

Here, you can do the following actions:

- [Add a related page](#)
- [View a page history](#)

#### 3.3.1.5.1. Add a related page

This feature allows you to add pages related to your page. This function can be done in the **Page Info** view and is activated to users with the Edit permission.

1. Click **Add More Relations** in the [Page Info](#) view, then select the related pages in the **Select a page** window.
2. Click **Select** to add the selected page to the list of the **Related Pages**.

Select a page

Wiki Home

About

eXo Platform 3.5

Introduction

Documentations

Resources

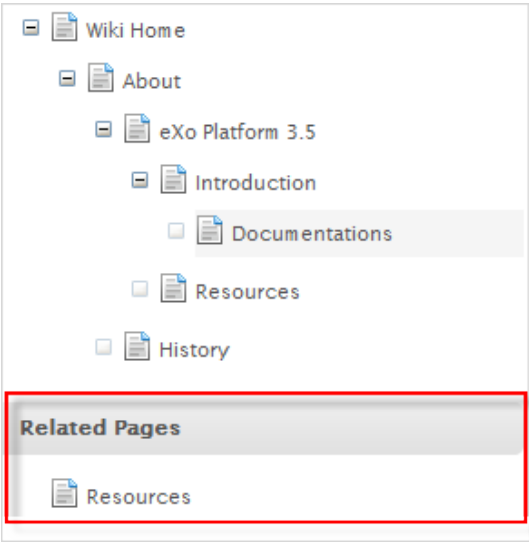
History

current page

Cancel

Select

The related pages of the opening page are displayed in the side pane as below.



3.3.1.5.2. View a page history

To access the page history, just click **View Page History** in the [Page Info](#) view.

The **History Page** appears.

Page History						
Compare Selected 1						
2	Revision 3	Date 4	Author 5	Summary 6	Action 7	
<input type="checkbox"/>	CURRENT (v. 9)	Nov 24, 2011 6:53 PM	john			
<input checked="" type="checkbox"/>	v. 8	Nov 24, 2011 6:45 PM	john		Restore	
<input checked="" type="checkbox"/>	v. 7	Nov 24, 2011 6:33 PM	john		Restore	
<input type="checkbox"/>	v. 6	Nov 24, 2011 6:33 PM	john		Restore	
<input type="checkbox"/>	v. 5	Nov 24, 2011 6:22 PM	john		Restore	
<input type="checkbox"/>	v. 4	Nov 24, 2011 6:19 PM	demo		Restore	
<input type="checkbox"/>	v. 3	Nov 24, 2011 6:18 PM	john		Restore	
<input type="checkbox"/>	v. 2	Nov 24, 2011 6:17 PM	mary		Restore	
<input type="checkbox"/>	v. 1	Nov 24, 2011 6:10 PM	john		Restore	

Details:

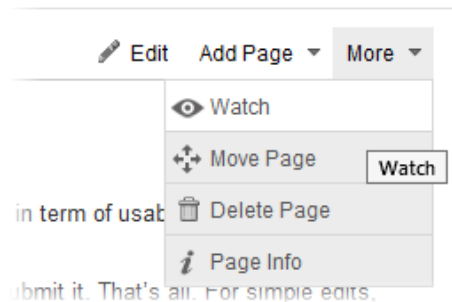
Item	Function
1	Compare selected page versions [62].
2	Allow you to select two versions that you want to compare.
3	Allow you to specify the version labels of the page and <a href="#">link to view a specific version</a> [61].
4	The date and time when the page is changed.
5	The authors who make changes of the page.
6	The reasons why the changes are made (optional).
7	<a href="#">Restore a page to the selected version.</a>

3.3.1.6. Watch a page

Watching a page allows you to receive a notification message about any changes in the page.

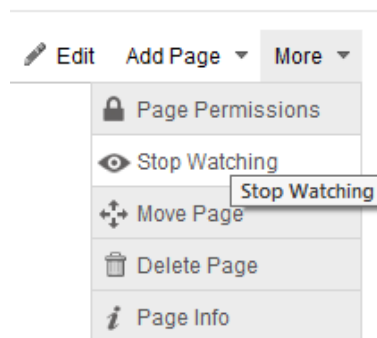
### Watch a page

1. Open the page you want to watch.
2. Click **More** in the **Page Control** area, then select **Watch** from the drop-down menu.



### Stop watching a page

1. Open the page which you are watching.
2. Click **More** in the **Page Control** area, then select **Stop Watching** from the drop-down menu.



## 3.3.2. Work with attachments

Attachments are any files enclosed with your pages. The attachments may be images, documents, presentation or multimedia files.

### View all attachments of a page

1. Open the page you want to view attachments.
2. Click the **Attachment(s)** link in the **Page info** area.

Added by [john](#) at Nov 24, 2011 6:10 PM - Last modified by [john](#) at Nov 24, 2011 6:53 PM ([View Change](#))  
[3 Attachment\(s\)](#) - [9 Revisions](#)

The **Attachment** pane of that page will appear:

Attachments			
File	Creator	Last Update	
<a href="#">Devguide-structure.txt</a>	John Smith	Jul 18, 2012 10:13 AM	
<a href="#">product-offerings.pdf</a>	John Smith	Jul 18, 2012 10:14 AM	
<a href="#">Upload New File</a> <span style="color: red; font-weight: bold;">← Upload new attachment</span>			

Here, you can:

- Download an attachment by simply clicking the attachment name.



- Delete an attachment by simply clicking .

### Add an attachment to a page

There are two ways to add an attachment to a page:

#### The first way

In this way, you need to open the **Attachment** pane of the page.




1. Click the **Upload New File** in the attachment list pane. The upload window will appear.
2. Select a file from your local device, then click **Open**. The file will be uploaded automatically then.

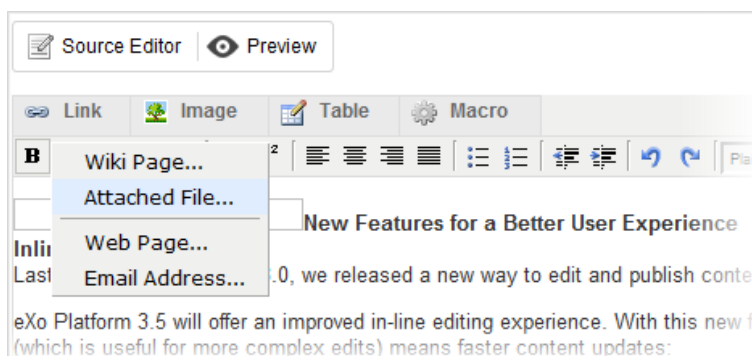
#### The second way

You can use this method when editing the page content by **WYSIWYG** editor (Rich Text editor).

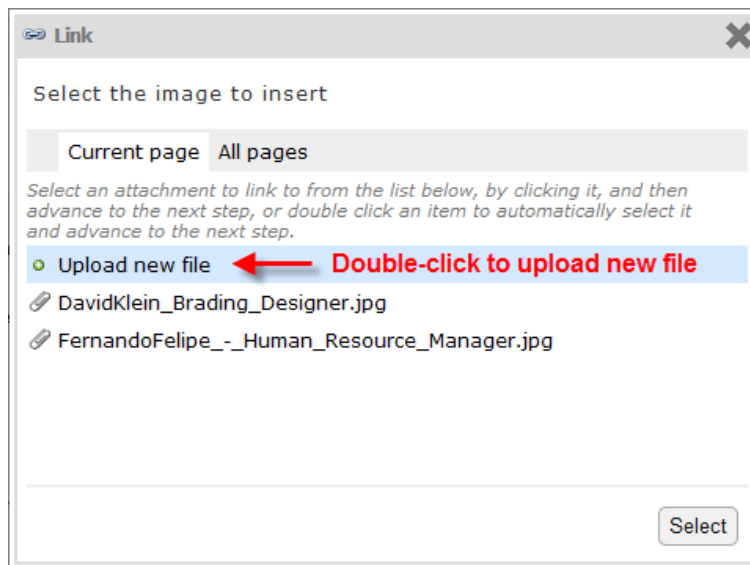
1. Select a page to which you want to add an attachment.
2. Select **Edit** at the **Page Control** area. For more details, see the [Edit a page](#) section.
3. Select the **Rich Text** editor on the page toolbar.



4. Click  **Link** on the toolbar of the **Rich Text** editor, then select **Attached File...** from the drop-down menu.



The **Link** form is displayed as below.



5. Select a file to upload. Now you can upload a new file or select one file from existing files.

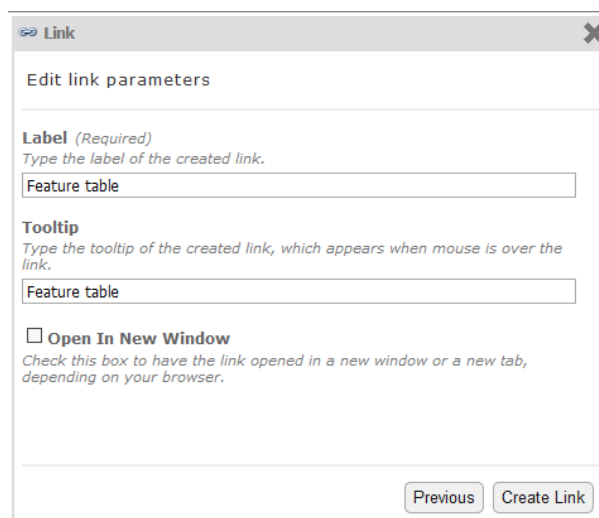
- **Upload a new file:**

i. Double-click **Upload new file**, or click **Upload new file** --> **Select** in the **Current page** or **All pages** tab.

ii. Click **Browse** to select a file from your local device, then select **Upload**.

- **Select from existing files:** Click the file, then select **Select**.

The form to edit the link parameters appears.

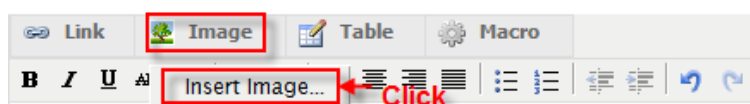


6. Provide the link label and tooltip.

7. Click **Create Link** to update the link.

### Insert an image




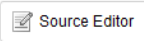
1. Click  **Image** on the text editor, then select **Insert Image...**

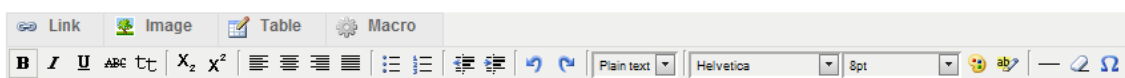


2. Select an inserted image of the current page, or click the **All Pages** tab to select an image attached to another page in the space.
3. Click the **Insert Image...** button.

### 3.3.3. Use the WYSIWYG Editor (Rich Text editor)

**WYSIWYG** stands for What You See Is What You Get. The **WYSIWYG** editor allows you to edit a wiki page directly in the wiki markup language. This has the advantage of being faster than the Rich Text Editor for some formatting tasks.

You can switch between the **Source** and **WYSIWYG** editors at any time by clicking  **Rich Text**  **Preview**  **Help** or  **Source Editor**. In the **Source** editor, which is selected by default when you edit a page, you have to use the wiki markup language for text formatting, while the **WYSIWYG** editor enables the content to be appeared during editing that is very similar to the published result. Thanks to available tools on this editor, you can format your content visually without using wiki markups.






#### Note

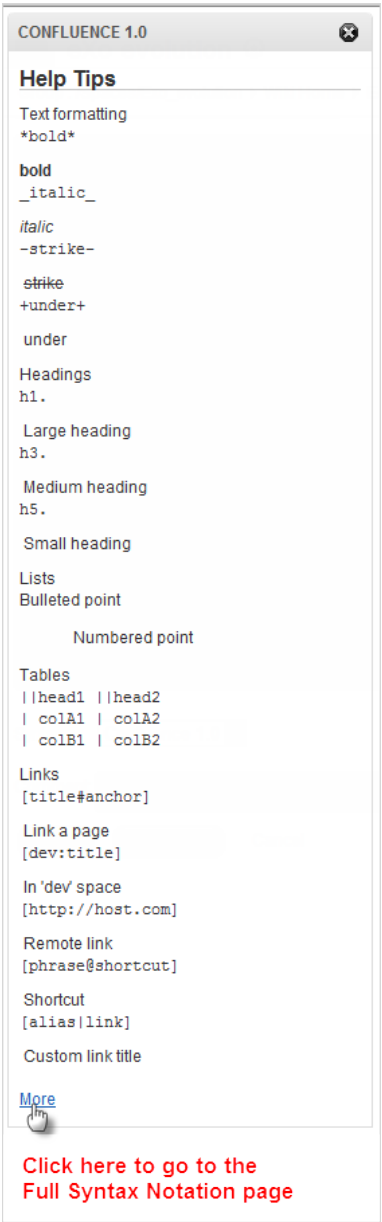
If the final result is not similar to what you wish when editing a page by the **WYSIWYG** editor, you can go back to the **Source** editor and use **Wiki** markups to edit the content.

When using the **WYSIWYG** editor, examples of commonly used markup are displayed in a lateral panel with a link to the [Full Syntax Notation](#) page for more details.

To learn more about the **WYSIWYG** editor, you can refer to the [WYSIWYG editor user guide](#).

### 3.3.4. Syntax Help

If you do not know how to use a syntax, you can use the **Syntax Help** function. The **Syntax Help** is displayed by clicking  **Help** from the page toolbar. When being clicked, a lateral pane beside the editing area will show all the Confluence syntax information. The lateral pane can be hidden by clicking  in the upper right corner or by clicking  **Help** again.



You can click [More](#) at the bottom of the short **Help Tips** form to open the **Full Syntax Notation** page.

You can insert icons, emoticons to emphasize the content. The usage is described in the **Full Syntax Notation** page with example so you can easily remember and use them.

**Example of emoticons and icons**

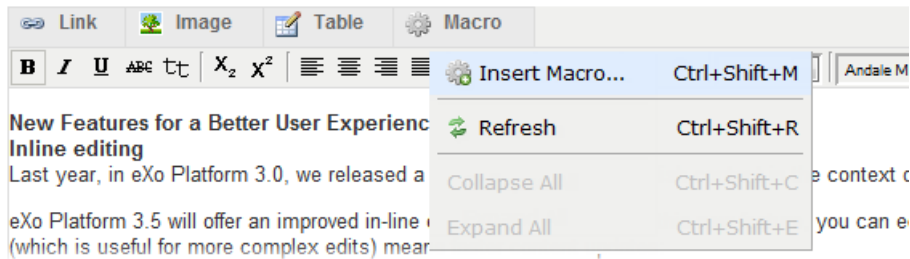


**3.3.5. Work with Macros**

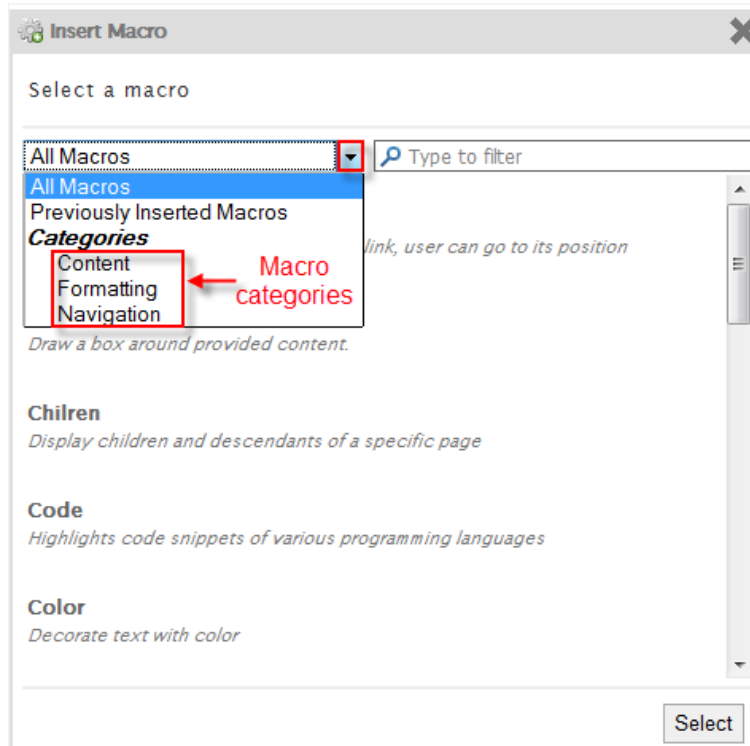
By using macros, you can apply extra formatting, functionality and customization to your content. You can easily add macro tags by using the **Rich Text** editor.

1. Switch to **Rich Text** editor.

2. Click **Macros**, then select **Insert Macros...** from the drop-down menu.



The **Insert Macros** form appears.



The macro is classified into different categories: **Content**, **Formatting**, **Navigation**.

3. Select a macro category.

4. Select your desired macro from the selected categories list, then click the **Select** button, or simply double-click it. For example, if you select the **Box** macro, you will go to the macro parameters form.

**Macro: Box**  
*Draw a box around provided content.*

**CssClass**  
*A CSS class to add to the box element*

**Image**  
*The reference to the image to display in the message box*

**Title**  
*The title which is to be displayed in the message box*

**Width**  
*An optional width for the box, expressed in px or %*

Previous Insert Macro

5. Enter parameters into the corresponding fields for your selected macro. Click **Insert Macro** to perform your macro insertion, or click **Previous** to return to the initial **Insert Macro** form.

The following table describes specific functions of common macros.

Macro	Function
<b>Excerpt</b>	Create additional information for the current page and it can be set to "hidden" in the current page, but displayed to add more information as the summary about the page when it is used with the Page Tree macro.
<b>Include Page</b>	Include the content of another page in the current page.
<b>Box</b>	Draw a box around the provided content.
<b>Color</b>	Change the text color.
<b>Code</b>	Highlight code snippets of various programming languages.
<b>Error Message</b>	Display an error message note.
<b>Float</b>	Allow content to 'float' on the left or the right.
<b>Info Message</b>	Display an info message.
<b>No Format</b>	Keep the content displayed like you type.
<b>Note Message</b>	Display a note message.
<b>Panel</b>	Embrace a block of text within a fully customizable panel.
<b>Table</b>	Inset a table.
<b>Table cell</b>	Insert a table cell.
<b>Table row</b>	Insert a table row.
<b>Tip Message</b>	Display a tip message block.

Macro	Function
<b>Warning Message</b>	Display a warning message block.
<b>Anchor</b>	Create an anchor in a page.
<b>Children</b>	Display the children and descendants of a specific page in the current page.
<b>Page Tree</b>	Display the hierarchy of a page in the current page.
<b>Related Pages</b>	Render the related pages of the current page.
<b>Table of Content</b>	Generate a table of content for the current page.
<b>Section &amp; Column</b>	Write the content in columns.

### 3.3.6. Work with page versions

When editing the content of a page, **Wiki** will automatically create a version of that page after it is saved. Thanks to the page versions, you can make changes on the page safely and roll back to an earlier version without worrying about messing things up.

In the [Page History](#) view, you can see all versions of a page.

Each version includes the following information:

- Revision numbers.
- Author making changes.
- Date and time when changes are made.
- Summary (if any).

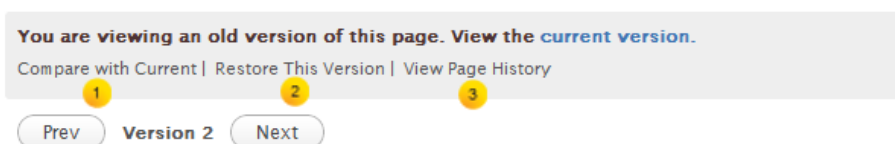


#### Note

All functions, including viewing, comparing and restoring, can also be done by clicking the **Revisions** link at the **Page Info** bar. One pop-up pane appears right under this bar, allowing you to do the same steps as described below.

#### View versions of a page

To view a specific version of a page, just click a version label in the **Page History** page. The selected version of that page will be displayed.



At a version of the page, you can do the following actions:

- Compare the current version with the selected one **1**.
- Replace the current version with the selected version **2**.
- Go to the **Page History** page **3**.
- View content of the previous version by selecting **Prev**.
- View content of the next version by selecting **Next**.

## Compare page versions

**Wiki** keeps track of histories of changes on a page by maintaining a version of the page each time it is modified. To compare two versions, select two checkboxes corresponding to each relevant version, then click [Compare Selected](#).

Page History				
<a href="#">Compare Selected</a>				
	Revision	Date	Author	Summary
<input type="checkbox"/>	CURRENT (v. 7)	Nov 24, 2011 6:33 PM	john	
<input checked="" type="checkbox"/>	v. 6	Nov 24, 2011 6:33 PM	john	
<input checked="" type="checkbox"/>	v. 5	Nov 24, 2011 6:22 PM	john	
<input type="checkbox"/>	v. 4	Nov 24, 2011 6:19 PM	demo	
<input type="checkbox"/>	v. 3	Nov 24, 2011 6:18 PM	john	

A page which shows the changes between these two versions will be displayed.

Version 5 by [john](#)  
on Nov 24, 2011 6:22 PM.  
[<< Changes from 4 to 5](#)

Compared With

Version 6 by [john](#)  
on Nov 24, 2011 6:33 PM.  
[Changes from 6 to 7 >>](#)

**Key**  
~~This line was removed.~~  
This word was removed. This word was added.  
This line was added.

**Changes (1)** [View Page History](#)

~~"David Klein Broding Designer.jpg"~~New Features for a Better User Experience"

"Inline editing"

Last year, in eXo Platform 3.0, we released a new way to edit and publish content in the context of a website. This was a major step forward in term of usability but also a great improvement in term of product reliability.

eXo Platform 3.5 will offer an improved in-line editing experience. With this new feature, you can edit a specific individual content item then submit it. That's all. For simple edits, bypassing the redirection to the Content Editor (which is useful for more complex edits) means faster content updates:

<http://paillereau.com/blog/wp-content/uploads/2011/10/blog1.png>

Double-click on the text you wish to change; edit, save and you're done.

What would be the advantage of in-line editing if you still needed to go to the Content Editor to push your changes live? We therefore added a new action to allow content publication from the front-end. It's fully dynamic and relies on the existing content publication workflow. Only users with publisher rights will see the publish button while making in-line edits to content:

<http://paillereau.com/blog/wp-content/uploads/2011/10/blog2.png>

The changes between two versions will be marked with colors:

- Words/lines which are red-highlighted with strike-throughs indicate that they were removed.
- Words/lines highlighted in green indicate that they were added.



### Note

Only two revisions can be selected at one time.

## Restore a page version to the current version

When you notice that there are changes in the current page version that you are not satisfied, you can rollback to an older version of that page quickly.

To restore an older version, click [Restore](#) corresponding to your desired version in the **Page History** page.



**Note**

Restoring an older version will create a copy of that version. For example, if the [current version (v.2)] is restored to the [older version (v.1)], **Wiki** will create a new version (v.3) containing content of v.1. The version v.3 will become the current version.

### 3.3.7. Work with Spaces

**Wiki** provides permanent bookmarkable URLs to all wiki pages. **Wiki** will resolve wiki pages by inspecting the URL used to call it. URLs are in the following form:

```
http://hostname/$CONTAINER/$SITE/$NAV_URI/[$OWNER_TYPE/$OWNER]/$WIKI_PAGE_URI
```

Item	Description
\$CONTAINER\$	The portal container.
\$SITE	The portal site (e.g,'classic').
\$NAV_URI	The URI of navigation bound to a page containing the <b>Wiki</b> portlet.
\$OWNER_TYPE	May be 'group' or 'user'.
\$OWNER	The wiki owner which can be name of user or of group.
\$WIKI_PAGE_URI	The URI inferred automatically from the wiki page name.

Any wiki page should be accessed by a friendly URL. For example:

- Portal wiki URL: <http://hostname/portal/classic/wiki/eXo+Wiki+Specification>.
- Group wiki URL: <http://hostname/portal/classic/wiki/group/platform/Administrators/Admin+Guide>.
- Personal wiki page URL: <http://hostname/portal/classic/wiki/user/john/Sandbox>.

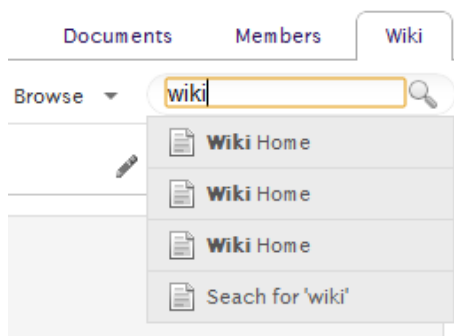
### 3.3.8. Search

In **Wiki**, you can search for spaces, or pages in a space, or attached files via either of 2 types:

- [Quick Search \[63\]](#)
- [Advanced Search \[64\]](#)

#### Quick Search

1. Enter a keyword into the search box.



2. Select your desired page from the drop-down menu. You will be redirected to the selected page.

**Note**

If you are in the portal wiki, your quick search will be performed on all wiki spaces, otherwise it will only be performed on the current wiki.

**Advanced Search**

The Advanced Search function allows you to search with a keyword in a specific space. This mode helps you limit the search results.

1. Enter a key term into the search box, then hit the **Enter** key.


The search results are displayed like the illustration below.

Search results for **wiki** in space **/spaces/exo\_evo**:

Showing 1 - 1 of 1 for **wiki**

**Wiki Home**  
 \_\_system text/plain UTF-8 {tip} Welcome to **Wiki Home** of /spaces/exo\_evolution group. \* See \*[Sandbox ...  
**group wiki:** /spaces/exo\_evolution  
 Created: Sep 29, 2011 5:21 PM - Last Modified: Sep 29, 2011 5:21 PM

If no results matched with the keywords, the search screen informs "**there is no search result...!**"

2. Click  to select a space from the drop-down menu to define a scale where to search for the entered word.
3. Click **Search**.

**3.3.9. WebDAV support in Wiki**

The WebDAV enables you to use the third party tools to communicate with hierarchical content servers via HTTP. It is possible to add and remove documents or a set of documents from a path on the server.

**Access your workspace using WebDAV**

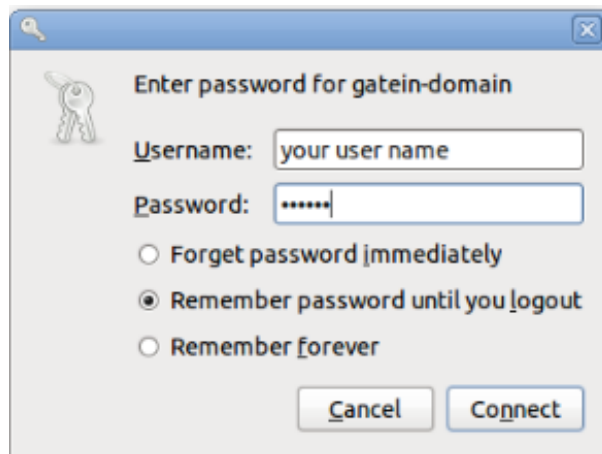
To access any workspaces of your repository, you can use the following URL format:

```
dav://host:port/rest/jcrwiki/{RepositoryName}/{WorkspaceName}/{Path}
```

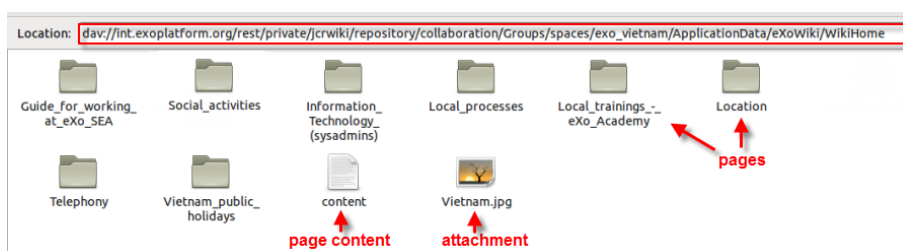
For example, to access the Wiki Home of the "exo vietnam" space, enter the following URL in the address bar of your OS's explorer (Nautilus is used in this example):

Location: `dav://int.exoplatform.org/rest/private/jcrwiki/repository/collaboration/Groups/spaces/exo_vietnam/ApplicationData/eXoWiki/WikiHome`

You will be asked to enter your username and password.



After login successfully, you will see all content in that Wiki space.



- Each folder is a wiki page. The folder name is the same as the wiki page title.
- The "Content" file is the file storing the page content.

### Edit a page using WebDAV

1. Go to the folder that contains the content you want to edit.
2. Use your text editor to edit the "Content" file in this folder. You can use the wiki syntax to format content as normal.
3. Save the file.



#### Note

- You can copy/move/delete a page by copying/moving/deleting the corresponding folder.

## 3.3.10. Wiki Administration



#### Note

This section is for administrators only.

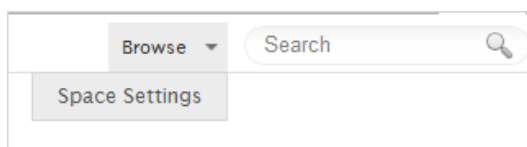
The administrator has the highest right in **Wiki**. The administrator can delete a page, change the space settings, set the Edit permission for users and more.

### 3.3.10.1. Set up space settings

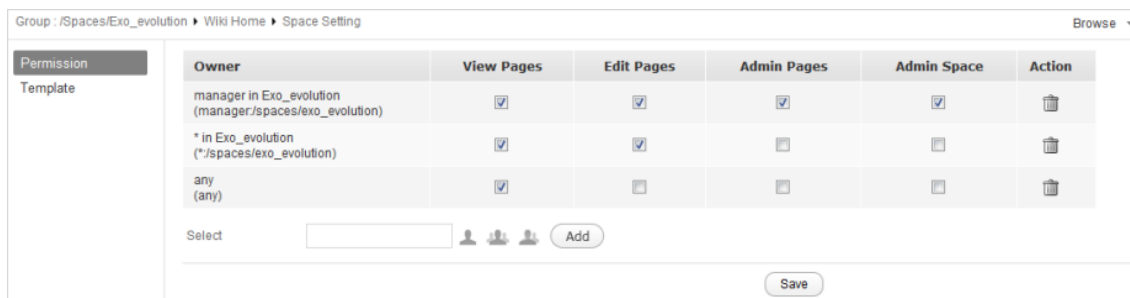
For each space, you can manage page templates.

#### Access the Space Settings page

1. Open a **Wiki** space.
2. Click **Browse**, then select **Space Settings**.



The **Space Settings** page appear.



Now, you can:

- [Manage permissions on spaces and pages](#)
- [Manage a page template](#)

### 3.3.10.2. Manage Permissions

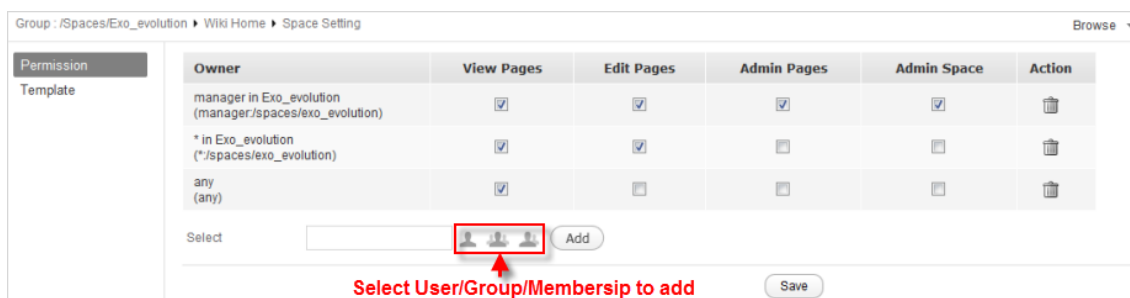
**Wiki** gives you the choice to make a space or an individual page to be open or restricted to specific users, groups or memberships. There are two levels of permissions in **Wiki**:

- [Space Permissions](#)
- [Page Permissions](#)

#### 3.3.10.2.1. Space Permissions

Each space may have its own permissions. Space permissions determine which actions a user can do within the space. A permission can be assigned to any users, groups or memberships.

To change the space permission, open a space, then click **Browse** and select **Space Settings** from the drop-down list. Click **Permission** in the **Space Settings** page that appears.



There are some permissions on a space as follows:

Permission	Description
<b>View Pages</b>	Specify who can view and watch pages of this space, its attachments and history.
<b>Edit Pages</b>	Specify who can edit pages of this space.




Permission	Description
<b>Admin Pages</b>	Specify who have the administration rights on pages of this space.
<b>Admin Space</b>	Specify who can administrate the space permissions and settings

In the **Space Permissions** form, you can:

- [Add space permissions of the users, groups and memberships.](#)
- [Delete space permissions of the users, groups and memberships.](#)

#### 3.3.10.2.1.1. Add space permissions

In the **Space Permissions** form, you can add permissions for individual users, groups of users or memberships.

1. Click    to assign permissions to a user, a group or a membership respectively.

The form to select the user, the group and the membership appears.

2. Select a user, a group or a membership, then click **Add**.

3. Click  to add the selectors to the **Owner** column in the **Space Permissions** form.

4. Tick the checkboxes corresponding to each permission you want to assign to the selectors.


5. Click **Save** to commit.



#### Note

View, Edit, Admin Pages permissions are applied by default to any pages of the space unless specific page permissions are set. The super user has all permissions implicitly.

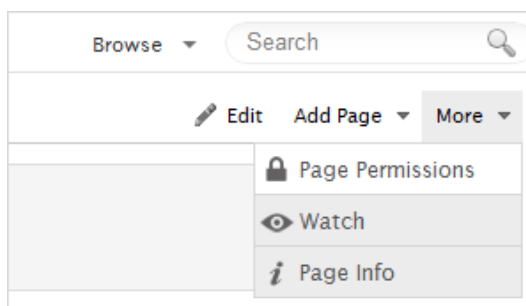
#### 3.3.10.2.1.2. Delete space permissions

To delete the permissions of a user, group or a membership in a space, just click  corresponding to a user or group or membership in the **Space Permissions** form.

#### 3.3.10.2.2. Page Permissions

The **Page Permissions** allows you to set the View and Edit permissions for a specific page of a space.

1. Open a page of the space that you want to set the permissions.
2. Click **More** and select **Page Permissions** from the drop-down menu.



The **Page Permissions** form appears.

Owner	View Pages	Edit Pages	Action
manager in Exo_evolution (manager/spaces/exo_evolution)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
* in Exo_evolution (*:/spaces/exo_evolution)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
any (any)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

Pages are viewable/editable according to the space permission. On each page, a user with the **Admin Pages** permission will be able to override the view and edit permissions on this specific page.

A **Page Permissions** action appears in the page action menu when the user has the **Admin Pages** permission.

You can add and delete the **View Pages Permission** or the **Edit Pages Permissions** for the page. Do the same as [Add space permissions](#) and [Delete space permissions](#).

### 3.3.10.2.3. Manage a page template

When adding a new page, you are not required to write the content from scratch. You can start by selecting a page template which is actually a **Wiki** page with predefined content.

In the **Space Settings** form, select the **Template** tab and the form to manage templates appears.

Portal : Intranet ► Wiki Home ► Space Setting

Permission  
**Template**  
 Syntax

Search 1  2 [Add more](#)

Template Title	Description	Action
Two-Column Layout	Global	
Three-Column Layout	Global	
Status Meeting	Global	
HOW-TO Guide	Global	
Leave Planning	Global	

3 4

Here, you can:

- [Search for a template](#) 1
- [Create a new template](#) 2
- [Edit a template](#) 3
- [Delete a template](#) 4

#### 3.3.10.2.3.1. Search for a template

This feature allows you to find your desired template quickly from the existing list as follows:

1. Input a word included in the title of your desired template in the **Search** textbox.
2. Press the **Enter** key, or click the **Search** button next to the textbox to start your search.

All matching results which contain your entered search term are displayed right below the textbox.

**Note**

The **Search** function is only performed by the template titles and you must enter a complete word into the **Search** textbox. For example, to find the template whose title contains "daily report", you can input "report" rather than "repo", or "daily" rather "ly".

### 3.3.10.2.3.2. Create a new template

1. Click **Add more...** in the **Space Settings** page and the sample template form appears.

The form contains a text input field labeled "Sample Template Title...", a text input field labeled "Description...", and two buttons: "Preview" and "Help".

2. Add the title for the template.
3. Write the description in the **Description....**
4. Write the content for the template.
5. Click **Save Template** at the **Page Control** area. A message will inform your successful template creation.

### 3.3.10.2.3.3. Edit a template

1. Click the **Edit** icon corresponding to the template you want to edit.
2. Change the title, the description or the content as you want.
3. Click **Save Template** at the **Page Control** area.

### 3.3.10.2.3.4. Delete a template

1. Click corresponding to the template you want to delete.
2. Click **OK** in the confirmation message to accept your deletion.

## 3.4. Build a forum

- [Regular users](#)

Detailed instructions on how to do common actions that are for regular users, such as creating topics and posts, subscribing, using BBCode, or changing user settings.

- [Moderator](#)

Introduction to the Moderation tasks that are for moderators, and steps to perform them, including: moderating forums/topics/posts, viewing all pending moderation tasks, or banning IPs.

- [Administrator](#)

Introduction to a list of common tasks which are for administrators only, and steps to manage categories/forums/users and other administrative tasks.

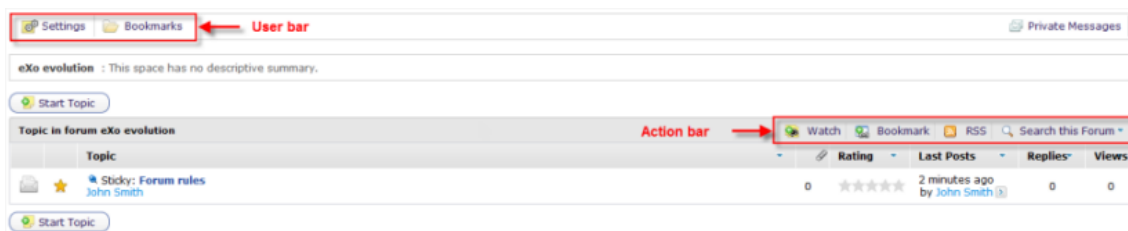
The section provides you a guide to use all **Forum** features or to configure the **Forum** portlet to make it work in your desired manner.

In **Forum**, the role of each user group is clear and very important. Each role has a set of tasks that they can execute. Administrators and moderators are responsible for setting up and maintaining **Forum**. With the highest rights, the administrators are in charge of the entire management tasks, including form configurations, users management,

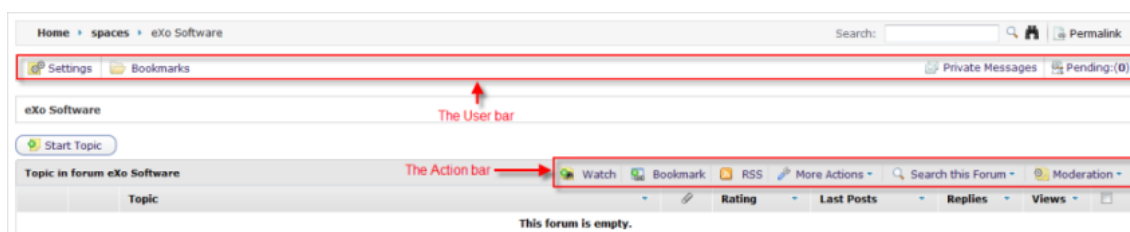
permissions, categories, forums, topics and messages. With sub-sets of administrative permissions, the moderators will manage the respective sub-sets of the forum.

The user interface will indicate which features are available to you, based on your role.

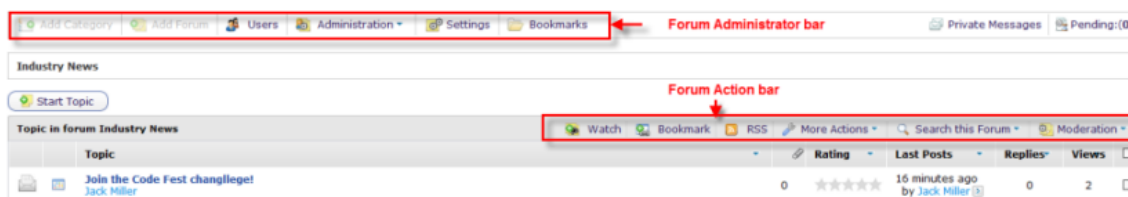
- As a regular user, you will have the **User** bar and **Action** bar with the basic actions.



- As a moderator, you will have the **User** bar and **Action** bar with a sub-set of certain capabilities.



- As an administrator, you will have the **Administration** bar which is basically the **User** bar with more administrative actions. You also see the **Action** bar with the advanced actions on forums and categories. Most of management tasks are shown via these bars.



To have an overall look of actions which users of each role can do in the **Forum** application, see the following table:

Features	Description	Administrator	Moderator	Regular user	Guest
View details of Forum	View categories, forums and many another information.	✓	✓	✓	✓
Subscribe to RSS feeds	Provide the link to <b>Forum</b> for easy sharing.	✓	✓	✓	✓
Attach a file	Upload attachments to a topic/post, preview and download attachments.	✓	✓	✓	✓
Search	Do the simple and advanced search.	✓	✓	✓	✓
Bookmark		✓	✓	✓	✗



Features	Description	Administrator	Moderator	Regular user	Guest
	Bookmark category, forum, topic.				
Add a post	Post reply, quote, private post, quick reply.	✓	✓	✓	✗
Edit your post	Edit post, quote and private post.	✓	✓	✓	✗
Delete your post	Delete post inside specific topic.	✓	✓	✓	✗
Add a topic	Start a new topic.	✓	✓	✓	✗
Edit a topic	Edit topic in a specific forum.	✓	✓	✓	✗
Delete a topic	Delete topic inside a specific forum.	✓	✓	✓	✗
Lock/Unlock topic	Lock/Unlock topics inside a specific forum.	✓	✓	✗	✗
Add a poll & Vote	Add a poll to topic and vote poll.	✓	✓	✓	✗
Rate a topic	Evaluate a topic by rating star.	✓	✓	✓	✗
Add a tag	Create new tags and tag a topic.	✓	✓	✓	✗
Private message	Send or receive private messages.	✓	✓	✓	✗
Watch	Subscribe to categories, forums, topics to receive notification mails of new posts or topics.	✓	✓	✓	✗
User Settings	Change profile settings, personal forum settings.	✓	✓	✓	✗
Stick/unstick topic	Stick/unstick topics inside a specific forum.	✓	✓	✓	✗
Lock/unlock topic	Close/open topic inside a specific forum.	✓	✓	✗	✗
Split a topic	Divide one topic into two separate topics.	✓	✓	✗	✗

Features	Description	Administrator	Moderator	Regular user	Guest
Merge topics	Combine two or more topics into one.	✓	✓	✗	✗
Manage a poll	Create, edit, delete, close and reopen polls.	✓	✓	✗	✗
Move a topic/post	Move one topic/post from a forum/topic to the other forum/topic.	✓	✓	✗	✗
Approve a topic/post	Change new topics/posts from pending status to normal status so that guest, normal user can view.	✓	✓	✗	✗
Uncensor a post	Allow a topic which has censored content to be displayed.	✓	✓	✗	✗
Show/hide a post	Allow posts to be shown/hidden.	✓	✓	✗	✗
Manage pending tasks	Manage all topics/posts waiting for moderation in one place.	✓	✓	✗	✗
Manage a watch [95]	Manage the subscription (watch). Edit and delete subscribed email.	✓	✓	✗	✗
Ban a user	Ban users from accessing specific forums or categories	✓	✗	✗	✗
Add a forum [111]	Add a new forum to a specific category.	✓	✗	✗	✗
Edit a forum	Change the title, description, moderator, permissions of a forum. However, moderators cannot set moderators for a forum.	✓	✓	✗	✗

Features	Description	Administrator	Moderator	Regular user	Guest
Delete a forum [113]	Delete forums from a specific category.	✓	✗	✗	✗
Lock a forum	Lock a forum so that it can be viewed only.	✓	✓	✗	✗
Unlock a forum	Unlock a locked forum that allow doing basic action on unlocked forum.	✓	✓	✗	✗
Close/open a forum	Close/open a forum. Closed forum are still manageable by administrator and moderators.	✓	✓	✗	✗
Move a forum	Move forum from one category to the other category.	✓	✗	✗	✗
Export a forum	Export a forum in the format of a .zip or .xml file.	✓	✓	✗	✗
Import a forum	Import a forum from .zip/.xml file into the <b>Forum</b> application.	✓	✗	✗	✗
Add a category	Add a new category.	✓	✗	✗	✗
Edit a category	Edit a category and change properties.	✓	✗	✗	✗
Export a category	Export categories in the format of a s.zip or .xml file.	✓	✗	✗	✗
Import a category	Import categories from .zip/.xml file into the <b>Forum</b> application.	✓	✗	✗	✗
Delete a category	Delete a category and all forum, topic, post inside it.	✓	✗	✗	✗
Administrate Sorting	Sort forums, topics according	✓	✗	✗	✗

Features	Description	Administrator	Moderator	Regular user	Guest
	to specific conditions.				
<a href="#">Administrate Censor</a>	Define keywords that will be censored in forum.	✓	✗	✗	✗
<a href="#">Customize the notification template</a>	Define the content of the notification mails.	✓	✗	✗	✗
<a href="#">Customize BBCode</a>	Add, edit and delete the BBCode tags used in writing posts/topics.	✓	✗	✗	✗
<a href="#">Add a topic type</a>	Add topic types that help users easily know what topics are about at a glance .	✓	✗	✗	✗
<a href="#">Set up auto-pruning</a>	Set up auto-pruning to clean a large amount of obsolete and inactivate topics based on criteria.	✓	✗	✗	✗
<a href="#">Ban IPs</a>	Ban IPs on the whole <b>Forum</b> application (only administrators) and on only specific forums (administrators and moderators).	✓	✓	✗	✗
<a href="#">Manage users</a>	Manage user's profile, promote users, ban users, view topic and post of a specific user.	✓	✗	✗	✗

**Note**

(\*): Regular users can only edit/delete their own posts/topics.

Before reading, please notice that this document is divided into 3 parts which correspond to different user roles:

- Forum user guide for [Regular users](#)
- Forum user guide for [Moderators](#)

- Forum user guide for [Administrators](#)

#### See also

- [About user roles](#)
- [Access Knowledge applications](#)
- [Build a wiki](#)
- [Build an Answers & FAQs system](#)

### 3.4.1. Regular users

This section describes actions that a regular user can perform in the **Forum** application of eXo Platform.

#### 3.4.1.1. View details of the Forum application

Once clicking **Forum** on the **Administration** bar, you will be directed to the **Forum** homepage. Here, you can see categories of **Forum**, forums in each category, forum statistics as shown below:

Home

Search:

[Permalink](#)

[Settings](#) [Bookmarks](#)

[Private Messages](#)

General Discussion

	Forums	Last Posts	Topics	Posts
	<a href="#">Industry News</a>	<a href="#">Join the Code Fest changlelegel</a> by <a href="#">James Davis</a> (15 hours ago)	1	6
	<a href="#">Caffeine Lounge</a>	<a href="#">SanSan is a copycat company?</a> by <a href="#">Mary Williams</a> (16 hours ago)	1	1
	<a href="#">Introduce Yourself</a>	<a href="#">Hi there!</a> by <a href="#">John Smith</a> (15 hours ago)	4	11

Mobile development

	Forums	Last Posts	Topics	Posts
	<a href="#">Android Development</a>	<a href="#">How to root Samsung Galaxy S i9000?</a> by <a href="#">John Smith</a> (15 hours ago)	1	5
	<a href="#">iOS Development</a>	<a href="#">New SDK released</a> by <a href="#">Mary Williams</a> (16 hours ago)	1	1
	<a href="#">Windows Phone Development</a>	<a href="#">eXo apps for Windows Phone released</a> by <a href="#">Jack Miller</a> (16 hours ago)	2	2

eXo FC

	Forums	Last Posts	Topics	Posts
	<a href="#">Announcement</a>	<a href="#">eXo FC members</a> by <a href="#">Mary Williams</a> (16 hours ago)	1	1
	<a href="#">Activities</a>	<a href="#">New uniform design</a> by <a href="#">James Davis</a> (15 hours ago)	3	3

spaces

	Forums	Last Posts	Topics	Posts
	<a href="#">eXoEvolution</a> This space has no descriptive summary.	Not Available	0	0
	<a href="#">eXo evolution</a> This space has no descriptive summary.	<a href="#">Forum rules</a> by <a href="#">John Smith</a> (17 hours ago)	1	1

What's Going on?

Maximum number of online users was : 3, at Thu,Nov 17,2011, 07:49 AM  
Online Users : [John Smith](#), [James Davis](#), [Mary Williams](#)

Forums Statistics  
Total Topics: 15, Total Posts: 31, Total Members: 5, Active Members: 4  
Welcome: [Jack Miller](#)

No recent post Has recent posts Forum is locked Forum is closed Has unread posts All read

#### 3.4.1.2. Search

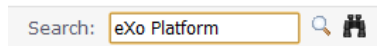
Like in **Answers**, you can do either of two search types (**Quick Search** or **Advanced Search**) anywhere in the **Forum** application, right on the homepage or inside each specific forum or topic that makes it easy to find the expected information.

##### 3.4.1.2.1. Quick search

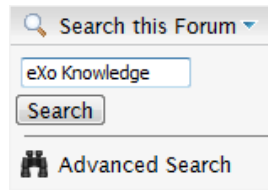
With **Quick Search**, users can directly type a search term in the textbox. All the categories, forums, topics and posts that have the keyword matching the search term will be quickly displayed in the **Search Result** form.

For example:

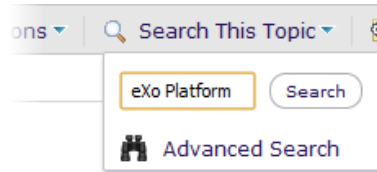
- The **Search** function on the main bar to search for items related to categories, forums, topics and posts.




- The **Search** function inside one specific forum to find topics and posts in the forum only.



- The **Search** function inside one specific topic to find posts related to the topic only.



### Do a quick search

1. Enter a search term into the relevant search textbox.
2. Click  or press the **Enter** key to perform your search, or click the **Search** button if you want to search in one forum or topic.

Depending on your selected object, the results which contain the matching keyword will be displayed in the **Search Result** form.


#### See also

- [View details of the Forum application](#)
- [Advanced search](#)

### 3.4.1.2.2. Advanced search

The **Advanced Search** allows users to make a search with particular criteria corresponding to the object you want to find.

#### Perform your advanced search

1. Click  at the top right of the **Forum** homepage when being in the **Forum** application or in the search pop-up or in the **Search this category/Search this forum/Search this topic/** on the **Action** bar of each selected object.

Based on the criteria you want to search, such as category, forum or post, the search criteria will be changed accordingly.

2. Enter the search criteria.
3. Click **Search** to do search. Also, click **Clear Fields** to reset the inputted values.

Matched results will be shown in the **Search Result** form. There will be an alert message when there is no object matching with the search criteria.

#### Find in categories

Select **Category** from the **Search in** drop-down menu.

Terms

Search in

Scope ☒ Full ☐ Titles

Username

Created between  and

Moderator

**Details:**

Field	Description
<b>Terms</b>	The search keyword.
<b>Scope</b>	The search scale. With the "Full" option selected, returned results are those with both titles and content matching the keyword. With the "Titles" option selected, returned results are those with titles matching the keyword.
<b>Username</b>	Filter search results by the category creator. Input the name manually, or click  to select users from a specific group.
<b>Created between - and</b>	Filter search results by categories created within an interval. Input the date manually, or click  to select a date from the mini calendar.
<b>Moderator</b>	Filter search results by the category moderator. Input the name manually, or click  to select users from a specific group.

**Find in forums**

Select **Forum** from the **Search in** drop-down menu.

Terms

Search in

Scope ☒ Full ☐ Titles

Username

Status ☐ Locked ☐ Unlocked

State ☐ Open ☐ Closed


Created between  and

Posts

Topics

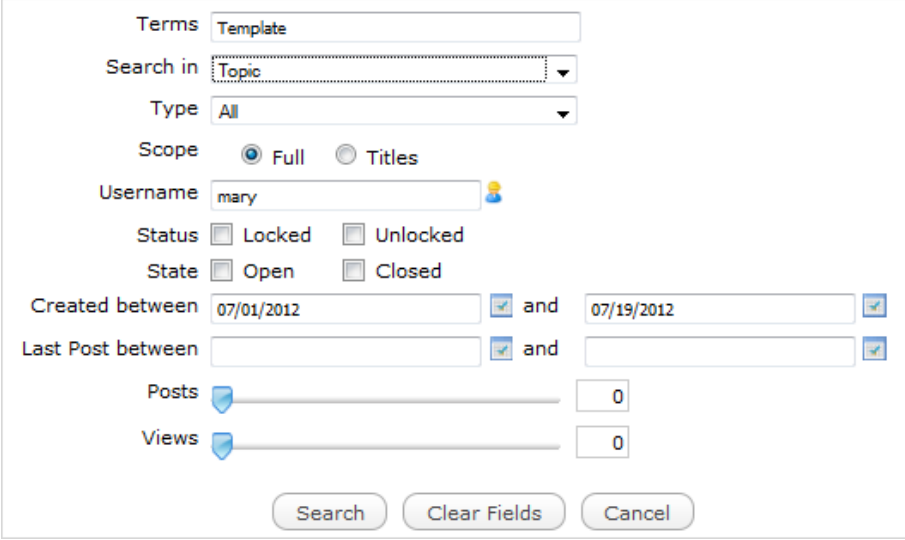
Moderator

**Details:**

Field	Description
<b>Terms</b>	The search keyword.
<b>Status</b>	The status of the forums ("Locked" or "Unlocked").
<b>State</b>	The state of the forums ("Open" or "Closed").
<b>Posts</b>	Filter search results by the minimum number of posts in the forum. Click and drag the slider bar to set the number of posts.
<b>Topics</b>	Filter search results by the minimum number of topics in the forum. Click and drag the slider bar to set the number of topics.
<b>Moderator</b>	Filter search results by the forum moderator. Input the name manually, or click  to select users from a specific group.

### Find in topics



Select **Topic** from the **Search** in drop-down menu.



The screenshot shows a search form with the following fields and options:

- Terms:** A text input field containing "Template".
- Search in:** A dropdown menu with "Topic" selected.
- Type:** A dropdown menu with "All" selected.
- Scope:** Radio buttons for "Full" (selected) and "Titles".
- Username:** A text input field containing "mary" with a user selection icon.
- Status:** Checkboxes for "Locked" and "Unlocked".
- State:** Checkboxes for "Open" and "Closed".
- Created between:** Two date input fields with "07/01/2012" and "07/19/2012", each with a calendar icon.
- Last Post between:** Two empty date input fields, each with a calendar icon.
- Posts:** A slider bar and a numeric input field set to "0".
- Views:** A slider bar and a numeric input field set to "0".
- Buttons:** "Search", "Clear Fields", and "Cancel".

**Details:**

Field	Description
<b>Terms</b>	The search keyword.
<b>Type</b>	The type of the topic specified by the topic type name and its icon. It can be selected from the existing list.
<b>Status</b>	The status of the topics ("Locked" or "Unlocked").
<b>State</b>	The state of the topics ("Open" or "Closed").
<b>Created between - and</b>	Filter search results by topics created within an interval. Input the date manually, or click  to select a date from the mini calendar.
<b>Last Post between - and</b>	Filter search results by the last post's created date in the topic. You can input the date manually, or click  to select a date from the mini calendar.



Field	Description
<b>Posts</b>	Filter search results by the minimum number of posts in the topic. Click and drag the slider bar to set the number of posts.
<b>Views</b>	Filter search results by the minimum number of topic views. Click and drag the slider bar to set the number of views.

### Find in posts

Select **Post** from the **Search in** drop-down menu.

The screenshot shows a search form with the following fields and values:

- Terms:** Template
- Search in:** Post (selected from a dropdown menu)
- Scope:** Full (selected with a radio button), Titles (unselected)
- Username:** mary (with a user icon button)
- Created between:** 07/01/2012 and 07/19/2012 (with calendar icons)

At the bottom are three buttons: Search, Clear Fields, and Cancel.

### Details:

Field	Description
<b>Term</b>	The search keyword.
<b>Scope</b>	The scale for searching. With the "Full" option selected, returned results are those with both title and content matching the keyword. With the "Titles" option selected, returned results are those with post titles matching the keyword.
<b>Username</b>	Filter search results by the posters' usernames. Input the name manually, or click  to select users from a specific group.
<b>Created between - and</b>	Filter search results by posts created within an interval. You can input the date manually, or click  to select a date from the mini calendar.

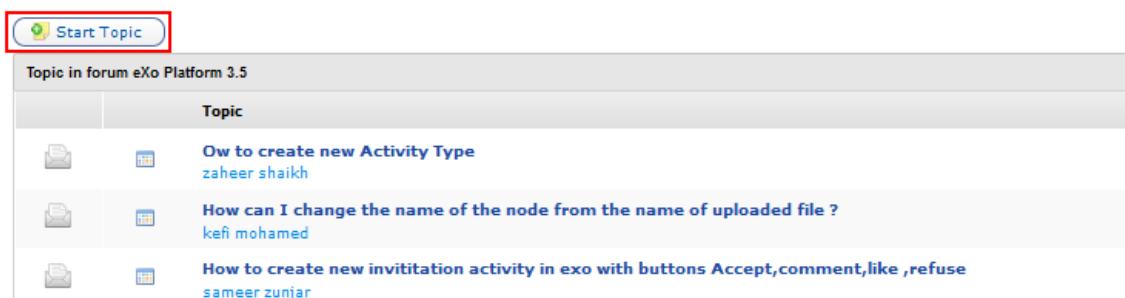
### See also

- [View details of the Forum application](#)
- [Quick search](#)

## 3.4.1.3. Topics

### 3.4.1.3.1. Start a topic

1. Go into the forum where you want to start a new topic.
2. Click .



3. Enter the topic title and its content. The title must be less than 100 characters (special characters are accepted). You may set [other optional properties](#) if you want.

- Click the **Attach files** link to attach files to your message. The maximum size for the attachment is 20Mb. Click next to the attachment to remove it.
- Use [BBCodes](#) to format text, or to insert images, videos and links.

The screenshot shows the 'New Topic' form with tabs for 'Content', 'Icon', 'Options', and 'Permissions'. The 'Content' tab is active. It contains a 'Title' field with the text 'BB code' and a 'Message' text area with the following text:

BB code is a set of tags based on the HTML language that you may already be familiar with. They allow you to add formatting to your messages in the same way as HTML does, but have a simpler syntax and will never break the layout of the pages you are viewing. The ability to use BB code is set on a forum-by-forum basis by the administrator, so you should check the forum rules when you post a new message.

Below is a list of the BB code tags you can use to format your messages.

At the bottom of the form, there is a 'Files' section with an 'Attach files' link and three buttons: 'Preview', 'Submit', and 'Cancel'.

4. Click **Preview** to see before submitting, or **Submit** to complete your topic.



#### Note

In a forum that enables moderation, new topics will need reviewing and approving by moderators before being published.

When creating a topic, you can also add extra properties to this topic:

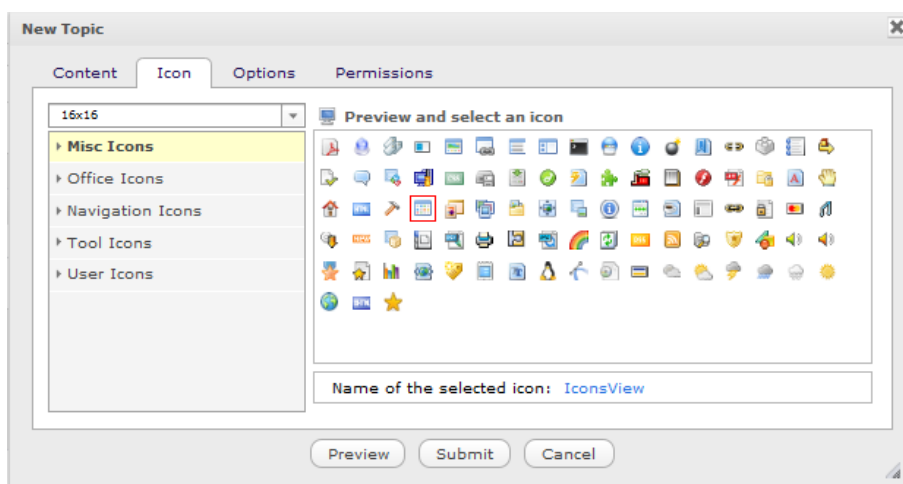
- [Select a topic icon.](#)
- [Set the topic options.](#)
- [Control who can view or post in your topic.](#)

#### 3.4.1.3.1.1. Select a topic icon

When posting a new topic, you may also assign an icon to the topic for the quick visual identification.

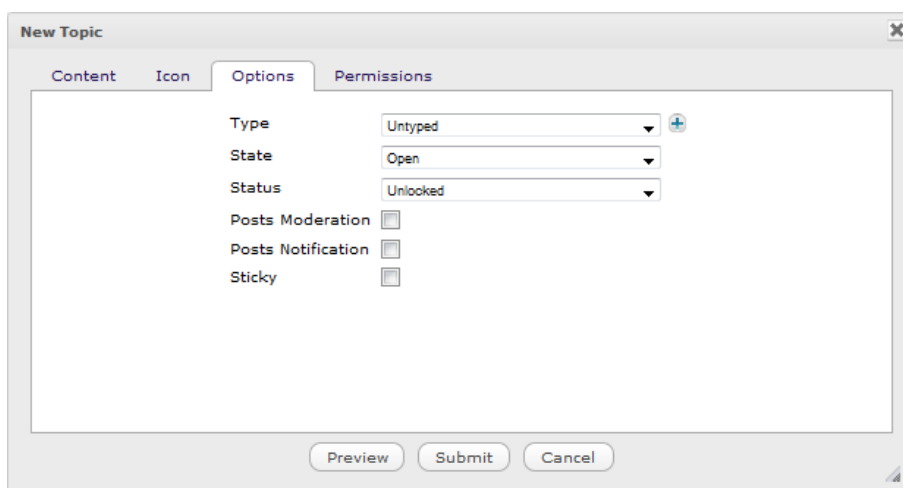
1. Go to the **Icon** tab in the **New Topic** form.

2. Select an icon category, then click your desired icon in the right pane. The selected icon is surrounded with the red border with its name shown below.





#### 3.4.1.3.1.2. Set the topic options

Going to the **Options** tab, you can select status, state, type of the topic and more.



**Details:**

Field	Description
<b>Type</b>	Type of the topic specified by the topic type name and its icon. You can select it from the existing types. The administrator can add a new one by clicking  (Note that only administrators can see  .
<b>Posts Moderation</b>	Check this option if you want posts to be moderated before being viewed.
<b>Posts Notification</b>	Check this option to enable the notification email when there are new posts in your topic.
<b>Sticky</b>	Check this option to stick the topic. A sticky topic will be located at the top of the topics list. A sticky topic will not fall down in the list if any new posts are added.

### 3.4.1.3.1.3. Set topic permissions

Go to the **Permissions** tab, you can set rights to view and post on your topic for another users. By default, all users can view and reply on a topic.

To set the permission to certain users, you can enter their usernames manually or:

- Click to select users.
- Click to select users defined by specific roles.
- Click to select groups.

### 3.4.1.3.2. Edit a topic

Regular users can only edit their own topic.

1. Click on the **Action** bar. For regular users, this button is only shown when you are the creator.
2. Click **Edit** from the drop-down menu to open the **Edit Topic** form.

3. Make changes to your desires. Also, leave the reason in the **Reason** field if needed.

4. Click **Submit** to finish.

### 3.4.1.3.3. Create a poll

Each topic may have a poll question with pre-defined options for users to select. As a regular user, you can only add a poll question to your own topic. Meanwhile, administrator and moderator can add the poll to any topics.


1. Go to the topic you want to add a poll.

2. Click **More Actions** on the **Action** bar, then select **Add Poll** from the drop-down menu.

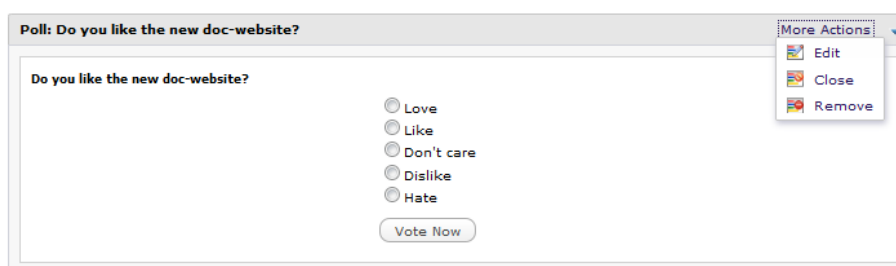
3. Enter the poll question and options.

**Details:**

Field	Description
<b>Poll Question</b>	Question raised for polling that is required.
<b>Poll Options</b>	Options which allow users to select as their answers.
<b>Close Poll After</b>	Period after which the poll is closed.
<b>Users may change their votes</b>	Allow users to change their votes or not.
<b>Allow Multiple Choices</b>	Allow users to vote for multiple options or not.

4. Click **Submit Poll** to complete. After adding a poll to the topic,  is then displayed in the topics list.


To perform further actions on this poll, simply left-click **More Actions** on the Poll pane to open the drop-down menu. Here, you can edit, close/reopen or remove the poll by clicking the relevant button.



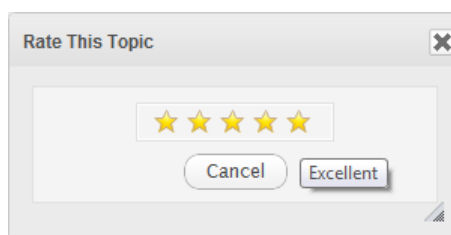
#### 3.4.1.3.4. Rate a topic

The **Forum** application provides an intuitive rating experience through a five-star scale. Your choice of five stars means the highest rating for the topic.

1. Go to the topic you want to vote.

2. Click  **Rate** on the **Action** bar.

The **Rate This Topic** form will appear.



3. Rate the topic by clicking the star. The number of selected stars will be changed from grey into yellow.




#### Note

Each user can only vote for a topic once. The function is disabled in closed topics and with banned users.

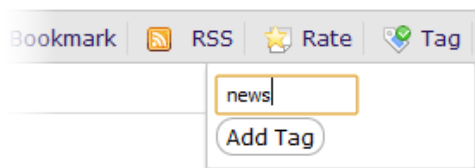
#### 3.4.1.3.5. Tag/Untag a topic

This function is for all logged-in users. Tags are keywords which are used as labels to describe or categorize the topic content. One topic may have several tag names. Using tags allows you to categorize topics based on the actual content. Even, it can be a better way to find a specific topic than a full-text search.

#### Tag a topic

1. Click  **Tag** on the **Action** bar.

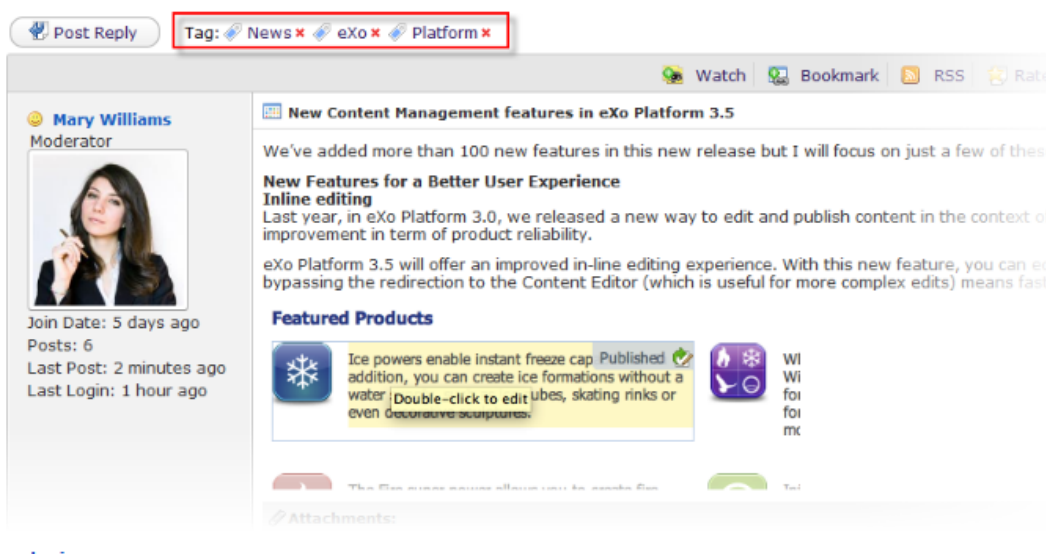
An input text box will pop up.



2. Enter a tag name or multiple tags separated by a space or select existing tags in the suggestion list that appears when typing.

3. Press **Enter** or click **Add Tag**.

Tags assigned to the topic appears as follows.




## Untag a topic

### The first way

- Simply click  next to that tag.

### The second way

This way allows you to untag one or multiple topics.

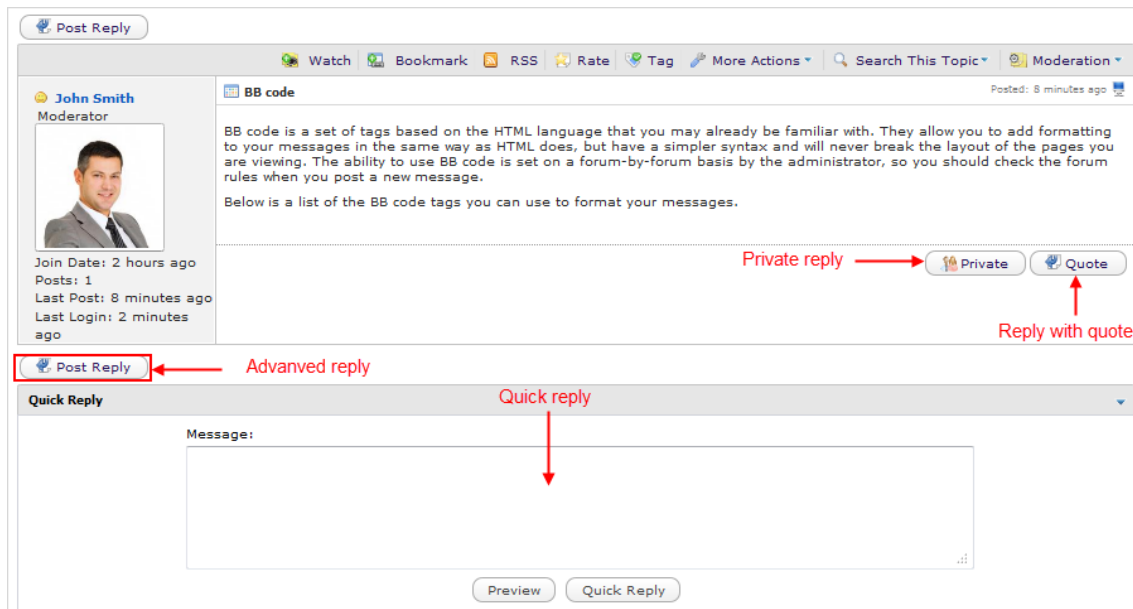
1. Click the tag name to be directed to the tags management page.
2. Tick your desired topic checkboxes from the topics list.
3. Click  **Manage Tag** on the **Action** bar, then select **Untag** from the drop-down menu.

<div>Manage Tag</div>						
		Rating	Last Posts	Rep	Untag	
	0	★★★★★	1 week ago by <a href="#">John Smith</a>	0	6	
	0	★★★★★	1 week ago by <a href="#">John Smith</a>	1	9	

### 3.4.1.4. Post

To post a reply, select the topic you want to reply to. You can reply to any topic as long as it is not closed and restricted. While you are viewing the topic, you can reply to it via either of the following ways:

- Type a message in the Quick Reply box at the bottom of the topic.
- Click the Post Reply button which is on the top or bottom of the topic.
- Post a private reply, or reply with a quote.



Also, you can:

- [Edit your post](#)
- [Delete your post](#)

#### 3.4.1.4.1. Post a quick reply

You can post a reply quickly with plain texts without taking into account its format.

1. Scroll down to the bottom of the topic to see the **Quick Reply** box.

2. Enter your message. Use [BB Codes](#) to format text, insert images, videos, or links.
3. Optionally, click **Preview** to view your reply before submitting it.
4. Click **Quick Reply** to send your message.

After posting your post, it will be highlighted, so you can notice it easily.


See also

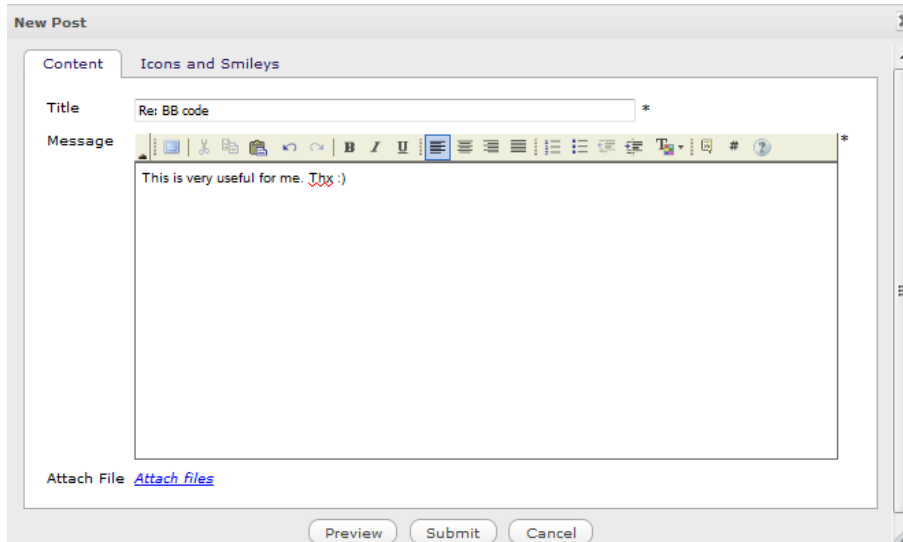
- [Edit your post](#)



### 3.4.1.4.2. Post an advanced reply

You can post a reply with the full editor as follows:


1. Go to the topic you want to post a reply.
2. Click  **Post Reply** on the top or bottom of the topic.
3. Enter your message in the textbox. Use **BBCodes** to format texts, or insert images, videos and links.



Optionally, you can:

- Attach files to the topic by clicking the **Attach files** link. The attachment size must be less than 20Mb.
  - Select an icon or smiley for the post in the **Icons and Smileys** tab.
4. Optionally, click **Preview** to view your reply before submitting it.
  5. Click **Submit** to finish.

If your post is the last one, its information will be shown at the **Last Posts** column of the forum.


The  icon in the topic title allows you to jump to the last read post in that topic.

See also

- [Edit your post](#)

### 3.4.1.4.3. Post a private reply

You can send a private reply in a topic, which only allows the responded user to view the message content.

1. Go into the topic you want to post the reply.
2. Click  **Private** under the post to open the **Private Post** form.
3. Enter your message and send it as described in the [Post an advanced reply](#) section.




#### Note

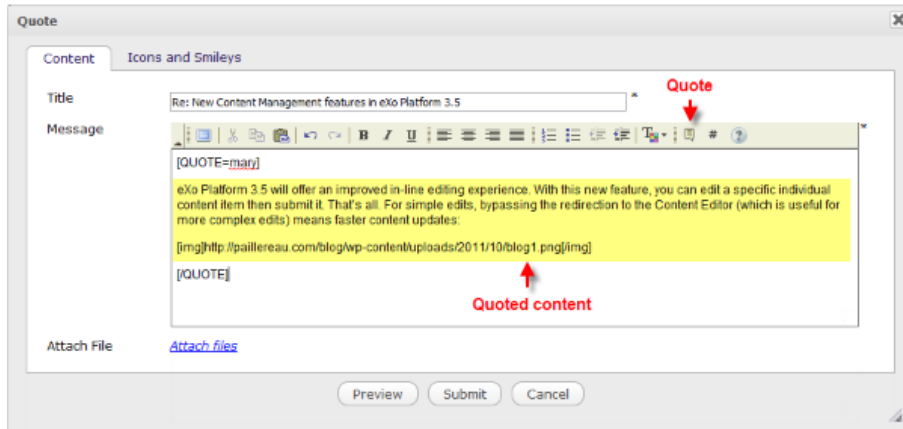
Private posts will not be checked for approval when it is posted in a topic that has the 'Posts moderation' enabled. Private posts are displayed with the 'Post private!' label.

#### 3.4.1.4.4. Reply with a quote


You can include a quote from the previous message in your reply to a specific post. This may substantially increase the readability of the discussion topics when it is used correctly.

1. Click  **Quote** under the post you want to quote.

This will bring up the "Quote" form, with the previous message already quoted in the textbox.



2. Enter your message. Edit the quotation if necessary.

i. In the **Content** tab, the quoted content is wrapped between BBcodes tags `[QUOTE=man]` and `[/QUOTE]` which is automatically generated. Add your message content before or after this quoted content. You can create a quoted content manually by clicking  from the **WYSIWYG** editor toolbar.




This will generate the quotation BBcodes tag for your message. After getting the quotation tag, enter your quotation between `[QUOTE]` and `[/QUOTE]`.

ii. In the **Icons and Smileys** tab, select an icon for your reply here.


3. Click **Submit** to finish.

#### 3.4.1.4.5. Edit your post

This function is to make changes on the post which has been submitted.

1. Click  **Edit** under the post you want to edit.
2. Make changes on the post, then click **Submit** to accept your changes. When you edit your post, you also can upload attachments, or delete an existing ones.

#### 3.4.1.4.6. Delete your post


1. Click  **Delete** under your post that want to delete.
2. Click **OK** in the confirmation message to accept your deletion.

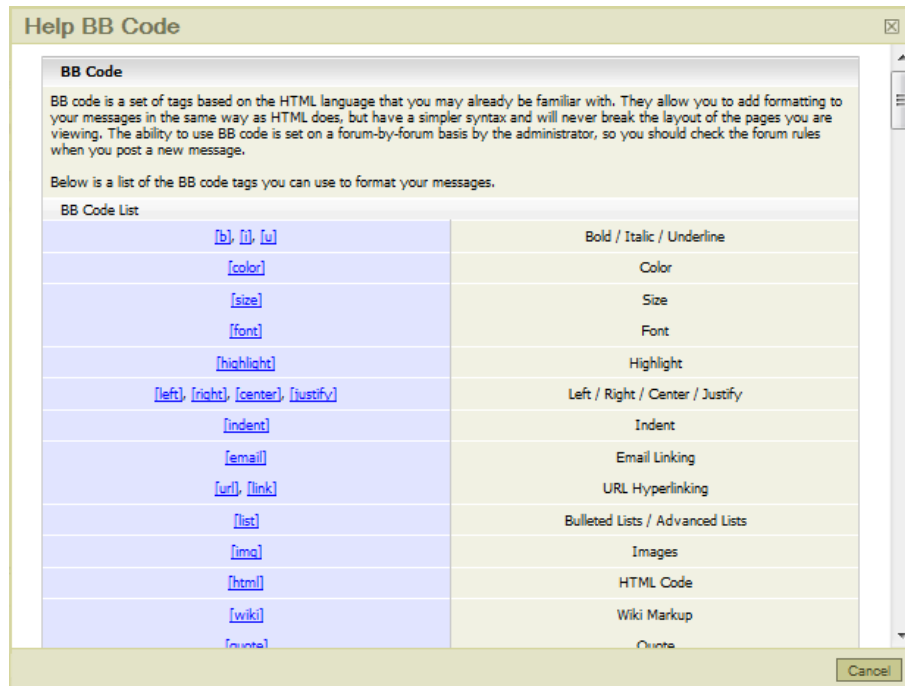
#### 3.4.1.5. Use BBcodes

BBcodes (Bulletin Board Codes) are special tags in bulletin boards that help users enrich their posts with formatting and inclusions. They are useful to provide guarded formatting capabilities to the forum users without the risk of breaking the HTML markup of the page. BBCode itself is similar in style to HTML: tags are enclosed in square braces "[" and "]" rather than "<" and ">" and it offers greater control over what and how something is displayed.

Depending on the [BBCode template customized](#) by administrators only, you may find it very easy to add BB Codes to your posts through a toolbar above the message area on the posting form. You can either type the BBCode tags manually or use the toolbar in the posting form. To easily get the BBCode tags without typing them, simply click the respective icon which is shown on the toolbar above the message area.



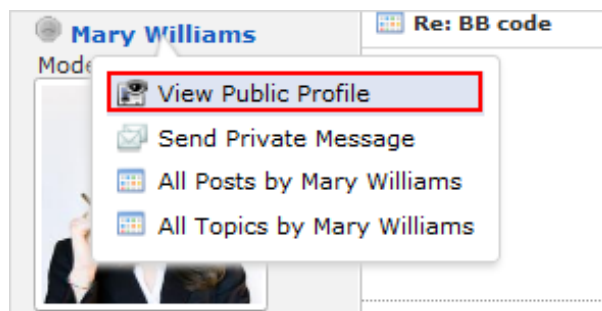
Click  on the toolbar to get the full list of built-in BBCode explanations and examples.



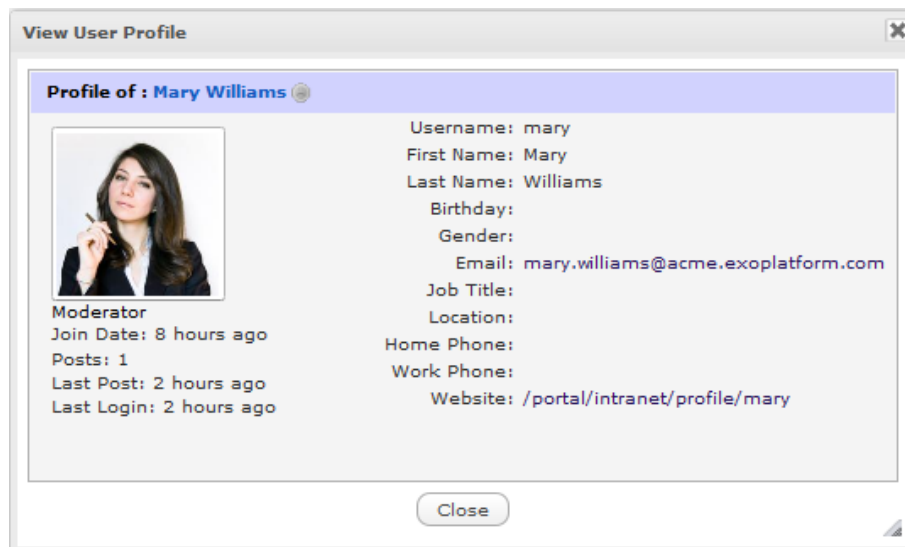
### 3.4.1.6. Public user profile

Every forum member has a publicly viewable profile. This includes information provided by the member, either during the registration process or later via the [User settings](#).

Whenever you see a member's name in a topic, you can view his public profile quickly by clicking his username or avatar and select **View Public Profile** from the drop-down menu.



The **View User Profile** form will be displayed.

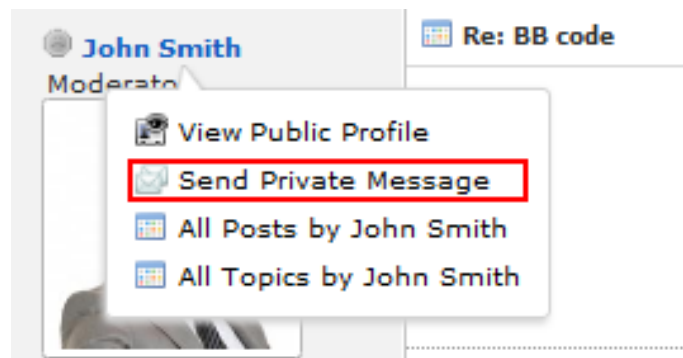


### 3.4.1.7. Private messages

Private messages will not be moderated and only viewable for recipients. Only logged-in users can do the following actions on private messages:

#### Send a private message

1. Click the username or avatar of the user you want to send message, then select **Send Private Message** from the drop-down menu.



The **Private Messages** form will appear.

The screenshot shows a 'Private Messages' window. It has a 'Send to' field containing 'john', a 'Title' field, and a large 'Message' text area with a rich text editor toolbar. At the bottom are 'Send' and 'Close' buttons.

2. Enter the username of the other recipients;

Or, click the icons next to the **Send to** field to select more others (if you want to send to many users at the same time).

3. Type your message title and content.

4. Click **Save** to send the message.

#### Receive a private message

When you have received a private message, there will be a notification on your **User** bar.



Click **Private Messages** to open the **Private Messages** form.

The screenshot shows the 'Private Messages' window with the 'Inbox' tab selected. It displays a table with columns 'Message', 'From', and 'Received on'. The message 'Why is my topic locked?' is shown, sent by 'james' 1 minute ago.

Details:

Tab	Description
<b>Inbox</b>	All received messages which can be viewed and deleted.
<b>Sent Messages</b>	All sent messages which can be forwarded and deleted.
<b>Compose New Message</b>	Where to compose new messages.


#### 3.4.1.8. Bookmarks

In the **Forum** application, the **Bookmark** function is to collect links to a category, forum or topic you have visited, so that you can return to that category, forum or topic directly. Bookmarks can be created and managed by yourself through the following actions:

### Add a bookmark


This function is for all logged-in users to save links to categories, forums or topics into the Forum Bookmark.

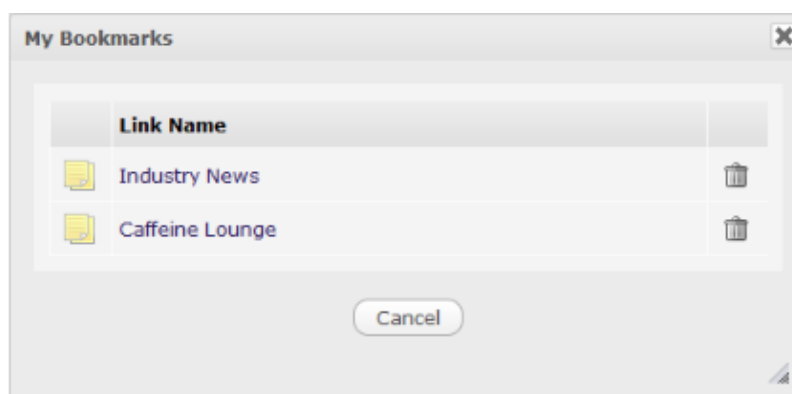
1. Go into the object (category, forum or topic) you want to bookmark.

2. Click  **Bookmark** on the **Action** bar;


Or, right-click the object title and select **Bookmark** from the drop-down menu. The bookmarked link will be added to your bookmarks list.

### View a bookmark

To view a bookmark, click  **Bookmarks** on the **Action** bar. This will bring up the **My Bookmarks** form, with the list of your bookmarked links. To view the bookmark, click a desired bookmark title from the list.




### Delete a bookmark

Simply click  corresponding to the link that you want to delete.

The selected bookmarks will be removed from the bookmarks list.

## 3.4.1.9. Subscribe to RSS feeds

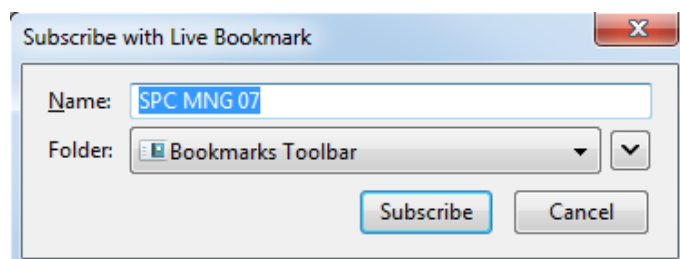
This function is for all users to subscribe to a specific category, forum, topic. If there are any changes, the feed of the subscribed category, forum or topic will be updated. To get the RSS feed, click  **RSS** on the **Action** bar.



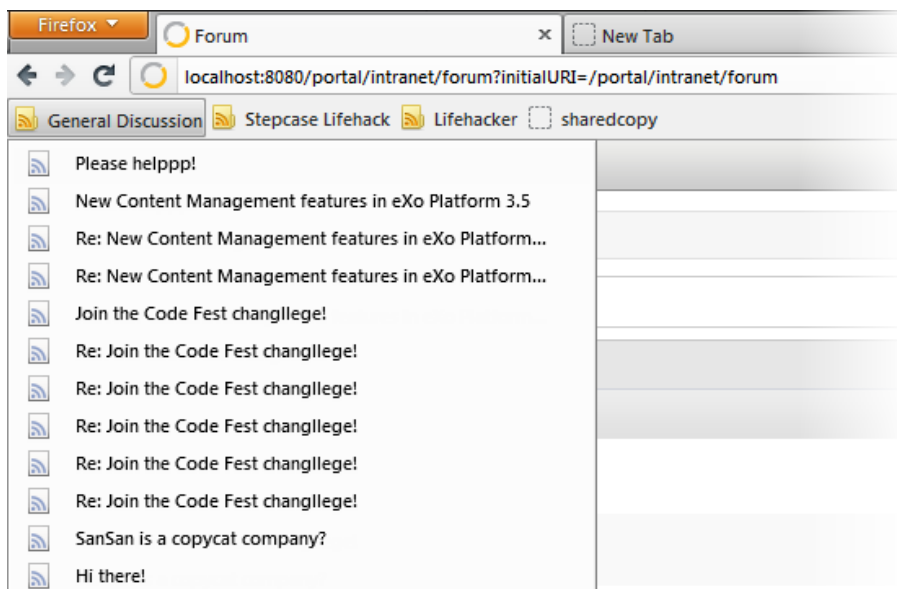
Or right-click the item you want to subscribe to.



The detailed information of the category/forum/topic is displayed on another tab. Depending on which browser you are using, this page may look different. The browser used in this example is Firefox 8.0.



The following illustration demonstrates the RSS feed subscription using the Firefox Live Bookmark.



- Category feeds contain all posts from all topics in all forums in a category. The category feeds shows the title (title of the category), description (category description), link (permalink to the category), pubdate (creation date of the category).
- Forum feeds contain all posts in all topics in a forum. The forum feeds show title (name of the forum), description (description of the forum), link (permalink of the forum), pubdate (creation date of the forum).
- Topic feeds contain all posts in a topic. The topic feeds show title (title of the topic), description (the content of the topic's initial post), link (permalink to the topic), pubdate (the creation date of the topic).

### 3.4.1.10. Watch

This function is for all logged-in users to keep track of changes in categories, forums or topics via notification emails. Whenever there are new changes, such as new categories, topics, posts created, you will receive a notification.

#### Watch a desired object

Go into the object (category, forum or topic), then click  **Watch** on the **Action** bar;

Or, right-click the object title and select **Watch** from the drop-down menu.



The watched objects are also listed in the **My Subscriptions** tab in the **Settings** form. When being unwatched, they also have been existed in this list.

You will receive the notification message of the successful watching. You will receive the email notifications about new posts/replies of the forum that you are watching as well. In the notification email, you will be provided links that help you go directly to the topic or go to reply to the post. After clicking this link, the new posts in your watched topic will be highlighted.

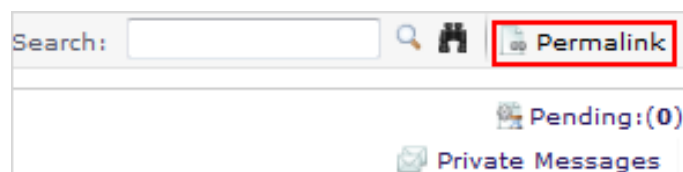
**Note**

Once a category/forum or a topic has already been watched, the **Unwatch** option will appear in the right-click menu or on the **Action** bar, so you can unsubscribe from the object.

### 3.4.1.11. Permanent links

This function is for all users to view and copy the link to a specific forum/topic and share it with others.


1. Go into a forum/topic which you want to share link.
2. Click the **Permalink** label at the right corner.

**Note**

The page link you want to share is displayed in the address bar of the web browser. You can copy and share it to others.

### 3.4.1.12. User settings

You may configure your settings yourself, such as personal profile, forum settings and subscriptions.

Click  **Settings** on the **User** bar to go to the **Settings** form. Once you opened the **Settings** form, you can control your personal settings, options and preferences via the following actions:

#### Edit your profile

By selecting the **Profile** tab, you can see your personal information and other preferences.



Here, you can:

- Edit your screen name and title displayed in forums in the **Screen Name** and **User Title** fields.
- Edit your signature which will be displayed at the bottom of your post. Enter your signature in the **Signature** textbox. Tick/Untick the **Display Signature** checkbox to enable/disable your signature.
- Change your avatar by clicking the **Update** link. Tick/Untick the **Display Avatar** checkbox to show/hide your avatar.
- Follow your created topics by selecting the **Watch topics I start** checkbox. You will receive email notifications when there are any new posts added to your topics.
- Follow topics which you have posted by ticking the **Watch topics I post in** checkbox. You will receive email notifications when there are any new posts added to your created topic.

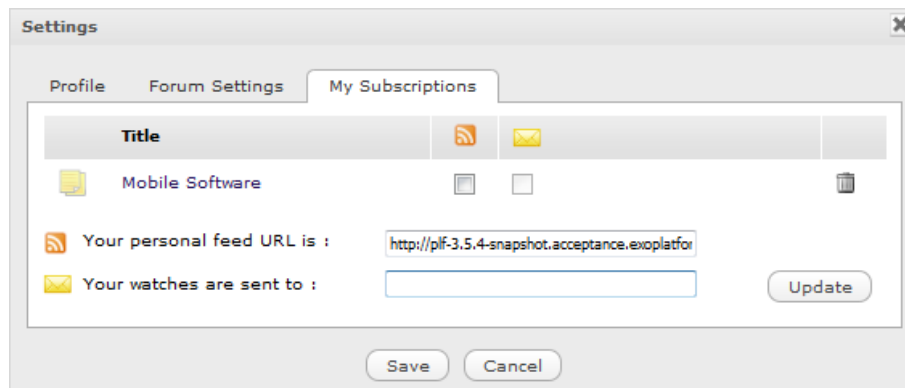
### Change forum settings






Go to the **Forum Settings** tab in the **Settings** form. You can change preferences, such as time zone, date and time formats, and other display options.

Check/Uncheck the **Show Forum Jump** if you want to show/hide the **Forum quick navigation** at the bottom of the **Forum** page.

### Edit your subscription

Go to the **My Subscriptions** tab in the **Settings** form, where you can update or delete existing subscriptions.



- In the  column, you can subscribe or unsubscribe your subscriptions by selecting/deselecting the respective checkboxes, then click **Save**. The selected objects (categories, forums, topics) will be updated to the **Your personal feed URL** is field. You can use this link to view the content of your subscriptions.
- In the  column, you can edit or delete your subscription email. Select an email, then click  to delete. Enter a new email address into the **Your watches are sent to** field. Click **Update** to add your entered email addresses in the  column.
- Click  to remove your watched category, topic, post. After being removed, you will no longer receive any email notifications of the removed object.

Next, click **Save** to accept your changes.

### 3.4.2. Moderator

Moderators in **Forum** are responsible for managing content of posts and replies before and after they are posted to the category where they are assigned as moderators.


#### 3.4.2.1. Moderate forums



##### Note

Moderators can manage all the forums inside their assigned categories.


##### 3.4.2.1.1. Edit a forum

1. Go into the relevant forum.
2. Click  **More Actions** on the **Action** bar, then click **Edit** from the drop-down menu.
3. Edit the forum properties.

4. Click **Save** to save all the changes.


#### 3.4.2.1.2. Lock/Unlock a forum

Locking a forum will prevent all members from creating new topics and posting replies in this forum. All topics in a locked forum will be locked also, but their content is still viewable. Moderators can only lock/unlock the forum that they manage.

1. Go into the forum.
2. Click  **More Actions** on the **Action** bar, then click **Lock/Unlock** from the drop-down menu.


#### 3.4.2.1.3. Close/Open a forum

Closed forums are invisible to regular users. To administrators and moderators, the content in a closed forum is still viewable, but creating topics and comments is disabled. Moderators can only close the forum that they are assigned to manage.

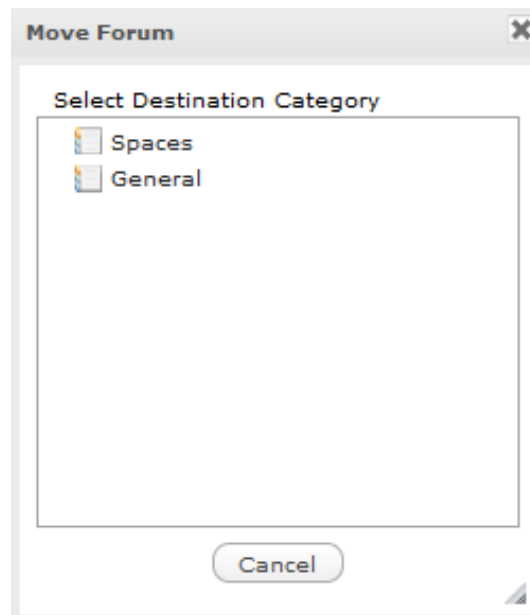
1. Go into the forum you want to close or open.
2. Click  **More Actions** on the **Action** bar, then select **Close** or **Open** from the drop-down menu.

#### 3.4.2.1.4. Move a forum

You can move a forum into another category as follows:

1. Go into the forum you want to move.
2. Click  **More Actions** on the **Action** bar, then select **Move** from the drop-down menu.

A list of existing categories will appear. Select a destination category to which your selected forum will be moved.

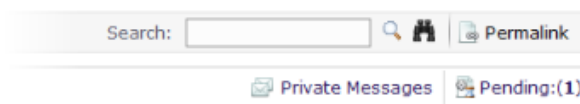


### 3.4.2.2. Moderate topics

#### 3.4.2.2.1. Approve a topic

Moderators can approve pending topics in forums that enable the '[Moderate Topic](#)' option. All new topics added to these forums will be pending for approval. It means that nobody can view these topics except administrators and moderators of the forums. Pending topics are only viewable when they are approved.

The administrator and moderator will know the total number of pending topics at the right corner of their **Forum Administration** bar and **User** bar.



Moderator can view the list of topics to be moderated. See [View all pending moderation tasks](#) for more details.

#### [Approve a topic](#)

##### The first way

1. Select topics by ticking their relevant checkboxes, then click  **Moderation** on the **Action** bar if you are in a list of topics;

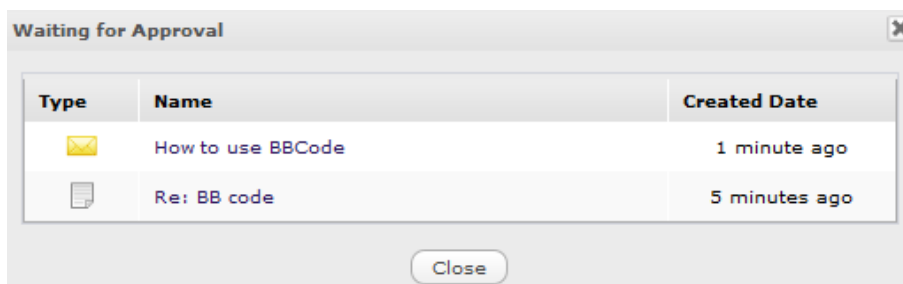
Or, if you are in a topic, simply click  **More Actions** on the **Action** bar.

2. Click **Approve** from the drop-down menu.

##### The second way

1. Click  **Moderation** on the **Action** bar, then click **Approve** from the drop-down menu. The **Waiting for Approval** form opens.

2. Select checkboxes corresponding to the posts you want to approve. You can preview the post when hovering your cursor over the post title.



3. Click **Approve** to accept your approval. Approved posts are shown normally for regular users to view and take some actions.

### 3.4.2.2.2. Edit a topic

1. Select a topic to edit by ticking its respective checkbox.
2. Click **Moderation** on the **Action** bar, then click **Edit** from the drop-down menu that appears.



3. Make changes on the topic. Leave the reason for editing in the **Reason** field if needed.

### 3.4.2.2.3. Close/Open a topic

Only administrators and moderators can perform these actions. Closed topics will be invisible to regular users. Moderator can only close or open topics in the category that he manages.

1. Select a topic by ticking its relevant checkbox, then click **Moderation** on the **Action** bar if you are in a topics list;

Or, click **More Actions** on the **Action** bar if you are in a topic.

2. Click **Close** or **Open** from the drop-down menu.

The icon of the closed topic will be changed to automatically.

### 3.4.2.2.4. Move a topic

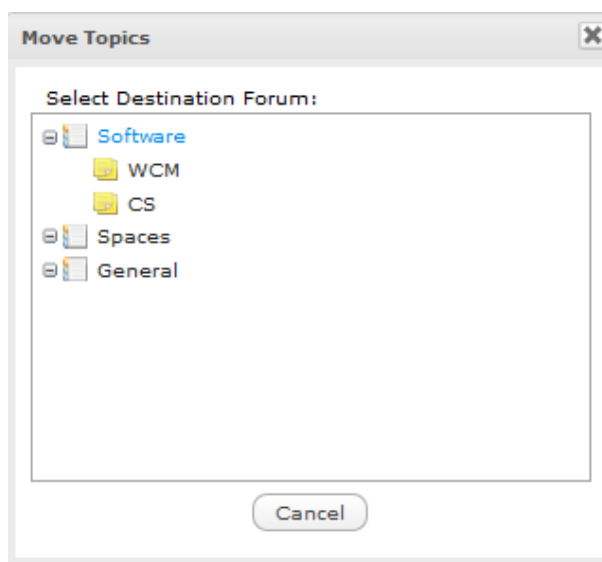
Only administrators and moderators can perform this action. This function is used to move topics from a forum to another one. Moderator can only move topics between forums that he manages.

1. Select a topic by ticking its relevant checkbox, then click **Moderation** on the **Action** bar if you are in a topics list;

Or, click **More Actions** on the **Action** bar if you are in a topic.

2. Click **Move** from the drop-down menu.

3. Click a destination forum to move.

**Note**


The moderator of a forum will be checked for permission. The moderator cannot move topics to:  
Closed/locked forums that he does not manage.

Forums to which he does not have the right to add topics.

Forums which are in categories that he is restricted.

Therefore, only the forums which the moderator can move topics are shown in the list of destination forums.

### 3.4.2.2.5. Delete a topic

1. Select topics by ticking their corresponding checkboxes, then click  **Moderation** on the **Action** bar if you are in a topics list;


Or, click  **More Actions** on the **Action** bar if you are already in a topic.

2. Click **Delete** from the drop-down menu.

3. Click **OK** in the confirmation message to accept your deletion.

### 3.4.2.2.6. Lock/Unlock a topic

This function is for administrators and moderators only to lock inappropriate topics. All posts in a clocked topic are still viewable, but posting replies will be disabled.


1. Select a topic by ticking its corresponding checkbox, then click  **Moderation** on the **Action** bar when you are in a topics list;


Or, click  **More Actions** on the **Action** bar when you are in a topic.

2. Click **Lock** or **Unlock** from the drop-down menu.

### 3.4.2.2.7. Stick/Unstick a topic

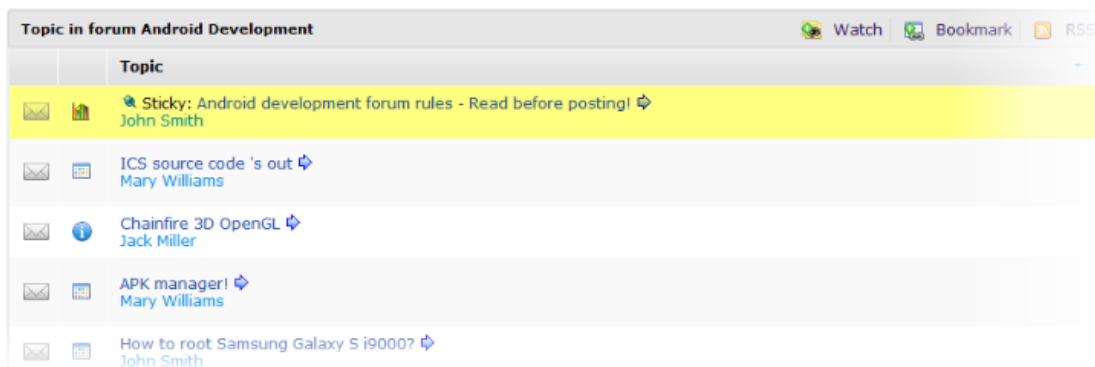
This function is for administrators and moderators only to stick topics which will be located at the top of the topics list. The topics will not fall down the list if any new posts are added.

1. Select a topic by ticking the corresponding checkbox, then click  **Moderation** on the **Action** bar when you are in a topics list.

Click  **More Actions** on the **Action** bar if you are already in a topic which you want to stick/unstick.

2. Click **Stick** or **Unstick** from the drop-down menu that appears.


You can see the stuck topic in the top of the topics list.



When creating a new topic, you can also make this topic stuck by ticking the **Sticky** checkbox in the [Options tab](#).

#### 3.4.2.2.8. Merge topics

When there are two or more related topics, you may want to merge these topics into one.


1. Go to the topics list.
2. Select more than two topics to be merged by ticking their checkboxes.
3. Click  **Moderation** on the forum **Action** bar.
4. Click **Merge** from the drop-down menu that appears. The **Merge Topics** form opens.

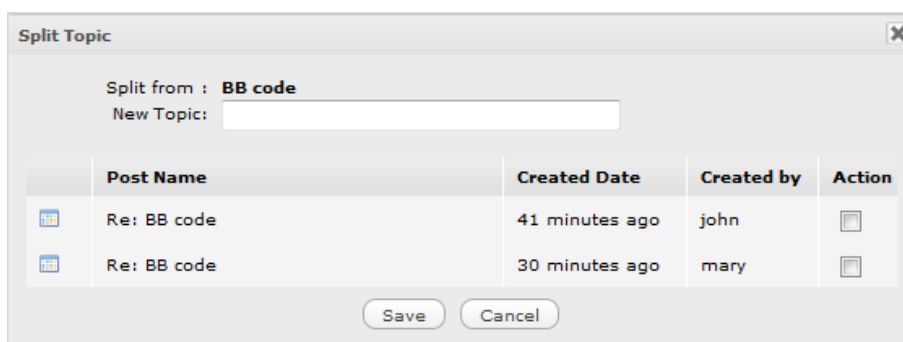
5. Select a destination topic which will be the main entry of the merged topic from the list of the existing topics.
6. Give one name for the new topic in the **New Topic Title** field if you want.
7. Click **Save** to accept.

After being merged, selected topics will be joined into one topic. All posts of the other topics are displayed as posts below the main entry.

#### 3.4.2.2.9. Split a topic

A topic with more than two posts can be split into separate topics.

1. Go into the topic you want to split.
2. Click  **More Actions** on the **Action** bar, and select **Split** from the drop-down menu. The **Split Topic** form opens.



Split Topic

Split from : **BB code**

New Topic:

	Post Name	Created Date	Created by	Action
<input checked="" type="checkbox"/>	Re: BB code	41 minutes ago	john	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Re: BB code	30 minutes ago	mary	<input type="checkbox"/>

Save Cancel

3. Enter the name for the new topic in the **New Topic** field.

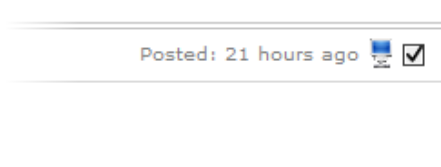
4. Select posts by ticking their respective checkboxes.


5. Click **Save** to complete.

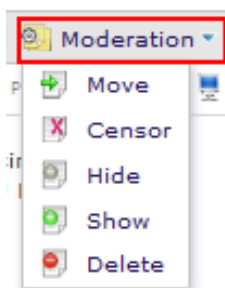
The new topic will be displayed in the topics list with the new name. The last selected post will become the main entry of the new topic.

### 3.4.2.3. Moderate posts

As a moderator, you have some specific rights on a post. To moderate a post, you need to select that post first by ticking its relevant checkbox.

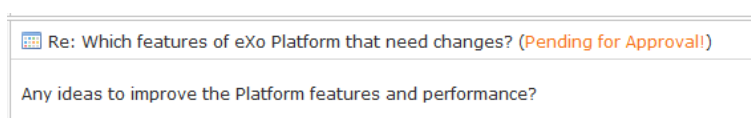


Next, click  **Moderation** on the **Action** bar and select your desired action from the drop-down menu. All the moderation actions will be reached via this menu.



#### 3.4.2.3.1. Approve a post

All posts in a topic that requires **post moderation** will not be viewable before approval. This function is to approve posts which are pending for approval.




You can select to approve a single post or multiple posts at the same time. The moderator can view the list of tasks to be moderated. See [View all pending moderation tasks](#) for more details.


#### The first way

1. Select the posts to approve.



- Click  **Moderation** on the **Action** bar, and select **Approve** from the drop-down menu.


#### The second way

- Click  **Moderation** on the **Action** bar, and click **Approve** from the drop-down menu. The **Unapproved Topics List** form opens.
- Select checkboxes corresponding to the posts you want to approve. You will see the preview of the post when hovering your cursor over the post title.
- Click **Approve** to accept your approval.


Approved posts are shown normally for regular users to view and take some actions.

### 3.4.2.3.2. Delete a post

#### The first way


- Tick the checkbox corresponding to the post you want to delete.
- Click  **Moderation** on the **Action** bar, then select **Delete** from the drop-down menu.
- Click **OK** in the confirmation message to accept your deletion.

#### The second way

- Click  **Delete** under the post you want to delete.
- Click **OK** in the confirmation message to accept your deletion.

### 3.4.2.3.3. Move a post

You can move posts to a topic of your choice.

- Select the post that you would like to move.
- Click  **Moderation** on the **Action** bar, then select **Move** from the drop-down menu.
- Select a destination topic in the topics list that appears.

The moderator will be checked for "Move" permission. He can only move posts inside the forum that he manages. Therefore, at the destination topics list, only the topics which the Moderator has the "move" permission, are listed.

### 3.4.2.3.4. Hide a post

When a post is hidden, only administrators and moderators can view and manage it.

To hide a post, select  **Moderation** on the **Action** bar, and click **Hide** from the drop-down menu.




After being hidden, the hidden post is marked with the 'Post Hidden!' label which cannot be viewed by regular users.


### 3.4.2.3.5. Show a post

You can show a single or multiple hidden posts at the same time:

#### The first way

- Select the post to be unhidden and click  **Moderation** on the **Action** bar, then click **Show** from the drop-down menu.


#### The second way

- Follow this method to show multiple posts.
- Click  **Moderation** on the **Action** bar, then select **Show** from the drop-down menu.
  - Select hidden posts by ticking their checkboxes.
  - Click **Show**.

### 3.4.2.3.6. Uncensor a post

The administrators and moderators can uncensor all topics, posts containing censored keywords. These censored keywords are [specified by Administrator](#). All topics and posts containing these keywords will be labeled with 'Pending and Censored' respectively.

#### The first way

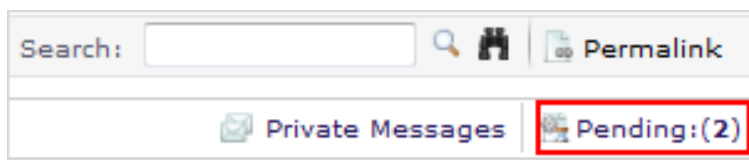
- Follow this method to uncensor a specific post/topic.
- Select censored posts/topics by ticking their checkboxes.
  - Select  **Moderation** on the **Action** bar, then click **Censor** from the drop-down menu.

#### The second way

- Follow this method to uncensor posts/topics in the list of existing hidden posts/topics.
- Click **Moderation** on the **Action** bar, then select **Censor** from the drop-down menu. A list of hidden posts appears.
  - Select hidden posts by ticking their relevant checkboxes.
  - Click **Show**.

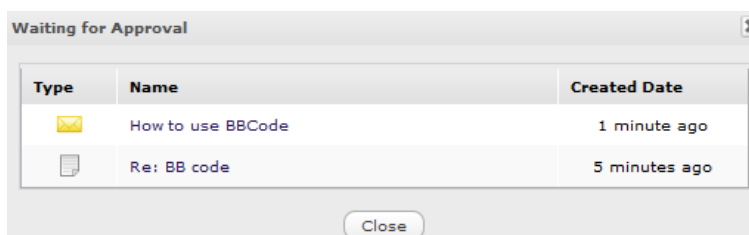
### 3.4.2.4. View all pending moderation tasks

Administrators and moderators can manage all pending tasks in **Forum** easily. The total number of pending topic/posts that need to be moderated are shown right on the **User bar/Forum Administration** bar.



To open the list of pending tasks, click **Pending** on the **User** bar.

The pending topics and posts are shown in the **Waiting for Approval** form.



This form lists all the pending topics, posts and the created dates. From here, you can approve or delete topics/posts.

### Approve a pending topic/post

1. Click the topic/post title in the list.



2. Click **Approve** to accept approving topic/post.

### Delete a pending topic/post


Simply click the **Delete This Topic/Delete This Post** button. The pending topic/post will be removed completely from the pending list and its forum.

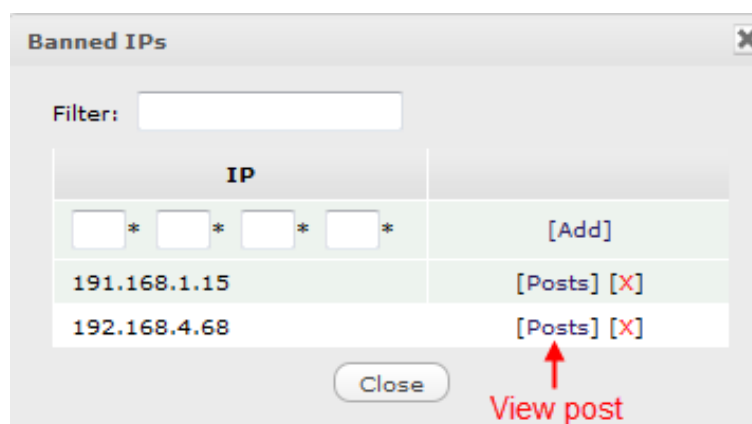
## 3.4.2.5. Ban IPs

This function allows banning IPs that may be used by users who abuse the forum functions or violate the forum rules and policies.

This function is similar to the [Ban IPs tool used by administrators](#). However, the Ban IPs tool used by administrators can ban IP from all forums, while moderators can only ban IP from forums which he manages.

### Ban IP on a specific forum

1. Go to the forum you want to ban IP.
2. Click  **More Actions** on the **Action** bar, then select **Banned IPs** from the drop-down menu. The **Banned IPs** form opens.



3. Do the [same actions](#) as the **Ban IPs** section of Administrators.

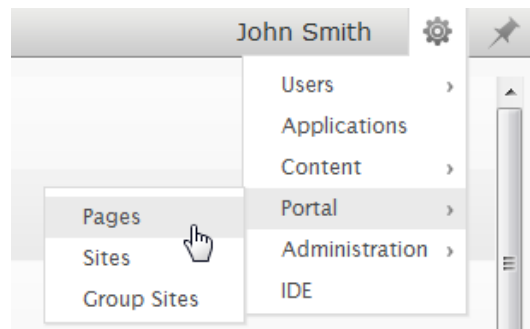
## 3.4.3. Administrator

With the highest rights, administrators are in charge of the entire management tasks. In another words, administrators have the global role of doing significant jobs, including: configuring and customizing the **Forum** portlet, backing up data, managing users and granting permissions, managing categories and forums.























### 3.4.3.1. Set up the Forum portlet


After adding the application to your **Space**, you have to configure the portlet settings to make it work in your desired way.

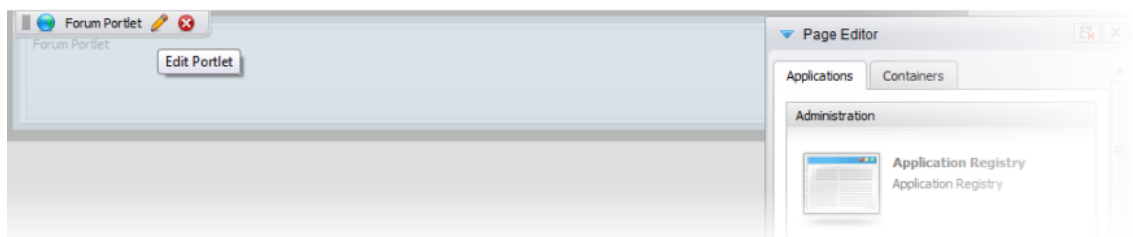
1. Click  **Portal** --> **Pages**.




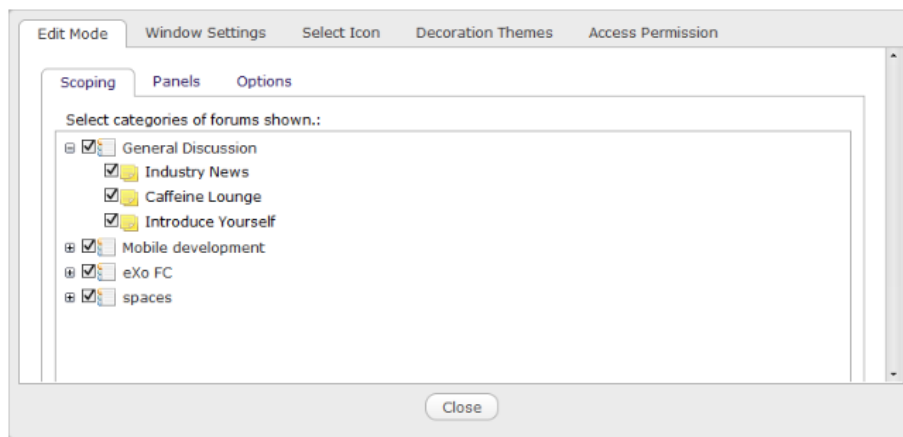
The **Page Manager** page will be displayed.

Title	Site Name	Type	portal	
Page Id	Title	Access Permission	Edit Permission	Action
portal::acme::overview	Overview	[Everyone]	editor:/platform/web-contri	 
portal::acme::news	News	[Everyone]	editor:/platform/web-contri	 
portal::acme::products	Products	[Everyone]	editor:/platform/web-contri	 
portal::acme::searchResult	SearchResult	[Everyone]	editor:/platform/web-contri	 
portal::acme::detail	Detail	[Everyone]	*:/platform/administrators	 
portal::acme::catalog	Catalog	[Everyone]	*:/platform/administrators	 
portal::acme::printviewer	Print viewer	[Everyone]	*:/platform/administrators	 
portal::acme::pclv	Parameterized Content List	[Everyone]	*:/platform/administrators	 
portal::acme::category	Category navigation portlet	[Everyone]	*:/platform/administrators	 
portal::acme::clv	Content List Viewer Portlet	[Everyone]	*:/platform/administrators	 
portal::intranet::homepage	Home Page	*:/platform/users	*:/platform/administrators	 

2. Click  that corresponds to the **Forum** page in the pages list.



3. Hover your cursor over the **Forum** portlet, then click  in the quick toolbar to open the **Edit Mode**.



This form allows you to configure the **Forum** portlet in various aspects via the following actions:

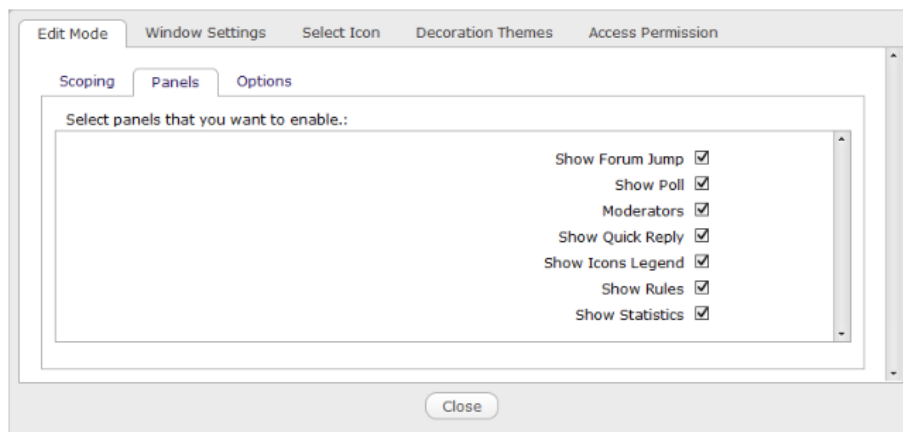
### Specify the category scoping

In the **Scoping** tab, you can show/hide categories and forums in the **Forum** portlet by selecting or deselecting their respective checkboxes.

### Enable/Disable Forum components

In the **Panels** tab, you can enable/disable some components in the Forum portlet.

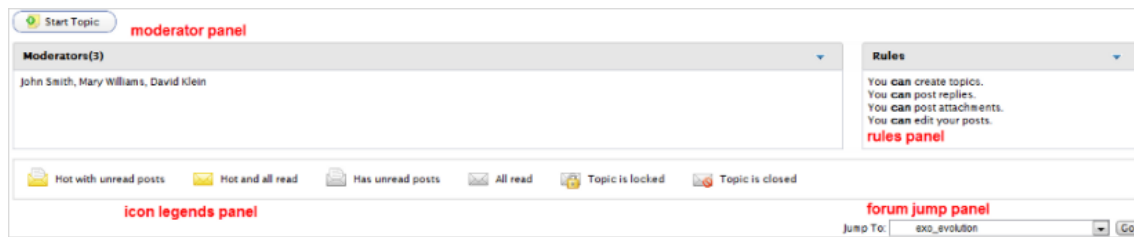
Simply select/deselect checkboxes of the components that you want to enable or disable.



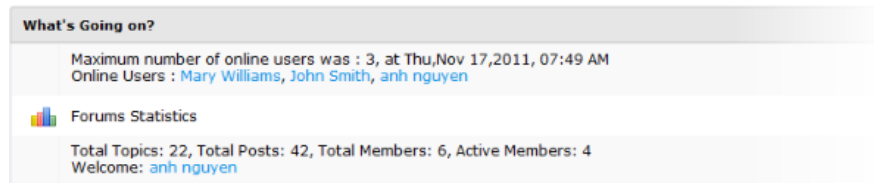
The following components can be enabled/disabled:

- Show Forum Jump
- Show [Poll](#)
- Moderators
- Show [Quick Reply](#)
- Show Icons Legend
- Show Rules
- Show Statistics

For example, if you have the **Moderators** or **Show Statistics** panel enabled, you will see it as below:

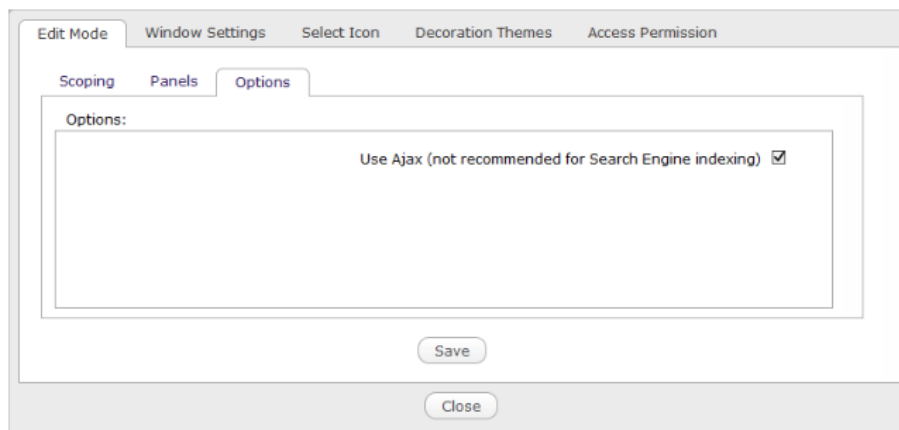


## Forum Statistics



## Enable/Disable a bookmarkable Forum URL

Before doing this function, you first need to have a knowledge of Ajax. Ajax (Asynchronous JavaScript and XML) is used in the **Forum** application, aiming at updating a whole webpage or a part of the webpage.

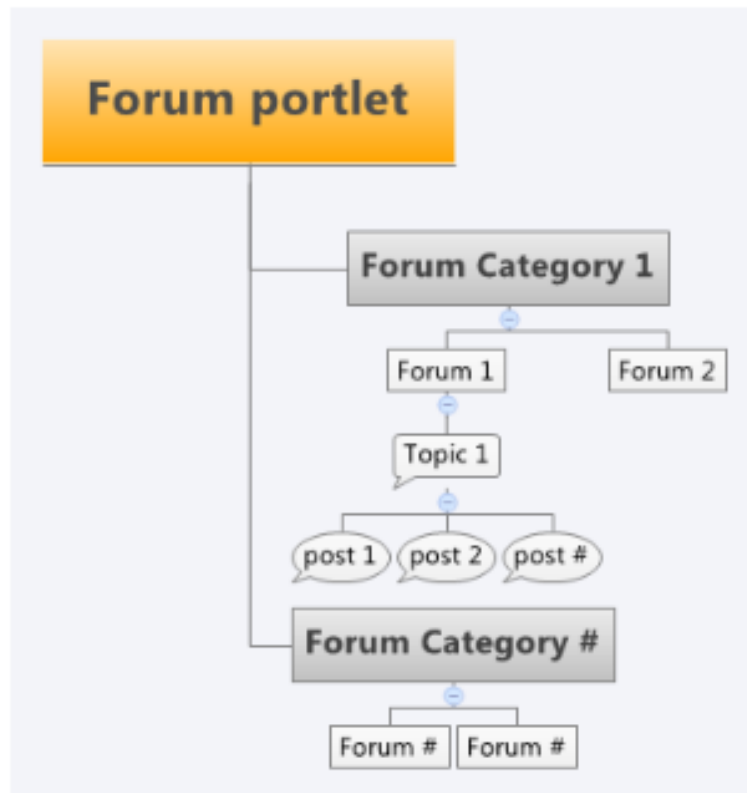


This feature defines how the links are generated in the **Forum** portlet. You can select to use Ajax or not.

- By not using Ajax, the **Forum** will generate plain URLs in the links. The added benefit will be bookmarkability and better SEO as the links will be permalinks.
- Using Ajax, the links will be Javascript based and generate Ajax calls. This makes your browsing faster because the whole page is not reloaded.

### 3.4.3.2. Manage categories

Only administrators can do categories-related management tasks. To manage forums better, the administrators usually build a good forum structure using categories. So, a category is a set of forums containing all discussions about the same subject. See the following diagram to learn about one typical **Forum** structure.



#### 3.4.3.2.1. Add a new category

Only when you are assigned as an **administrator**, you can do this function. Normally, one category is created as public and it allows everyone to access without any restrictions. Meanwhile, one **restricted category** only allows specific users/groups/memberships to access. Also, you can assign moderators to your category and specify a set of permissions for members in the category.

1. Click  on the **Forum Administration** bar. The **Category** form will be displayed.

The screenshot shows the 'Category' form with two tabs: 'Category' and 'Permissions'. The 'Category' tab is active. It contains the following fields:

- Title:** A text field containing 'Manager zone'.
- Order:** A text field containing '0'.
- Restricted Audience:** A large text area with a small icon of three people.
- Description:** A text area containing 'For Forum Administrators and Moderators only'.

At the bottom of the form are 'Save' and 'Cancel' buttons.

2. Enter the category title into the **Title** field which is required. Its length must be between 1 and 100 characters (Special characters and spaces are accepted).

In the **Category** tab, optionally you can also:

- Enter the order of category in the numeric format into the **Order** field.

- Give a brief description for your category into the **Description** field.
- Create a category restricted by limiting the number of audiences via one of the following ways:

#### The first way

Enter names of users/groups/memberships that can access this category into the **Restricted Audience** textbox. The different values are separated by commas.

#### The second way

Use selectors next to the **Restricted audience** textbox.

- Click 👤 to select a specific user from the groups list.
- Click 👤👤 to select all users with the specific membership in a group.
- Click 👤👤👤 to select a group of users.

Optionally, select the **Permissions** tab to specify the category permissions.

- Do the same ways as setting the "**Restricted audiences**" of a category.


3. Click **Save** to finish.



#### Note


In eXo Platform 3.5, each space forum belongs to a category named "spaces" and there is only one forum per space. You cannot therefore create new categories within each space forum.

### 3.4.3.2.2. Edit a category

1. Select a category to edit from the **Forum** homepage, then click  on the **Action** bar when you are in the categories list.
2. Click **Edit** from the drop-down menu.
3. Make changes on the category properties.
4. Click **Save** to save your changes.



### 3.4.3.2.3. Delete a category

1. Select a category to delete from the **Forum** homepage, then click  **Manage Category** on the **Action** bar.
2. Click **Delete** from the drop-down menu.
3. Click **OK** in the confirmation message to accept your deletion.





#### Note

When a category is removed, all its forums are also removed.

### 3.4.3.3. Manage forums

Managing forums can be performed through the following actions:

#### Add a new forum to a specific category

1. Go into the category to which you want to add a new forum.
  2. Click  **Add Forum** on **Forum Administration** bar;
- Or, click  **Manage Category** on the **Action** bar and select **Add Forum**.



3. Enter the forum title which is required. Its length must be less than 50 characters, including spaces.

Optionally, you can:

- Enter the order for your forum that must be in the positive integer format.

- Select the forum state.
- Select the forum status.
- Give brief description for your forum.

4. Click **Save** to finish.

The administrators and moderators of a forum may want to get updated of what is new in forums under their management. This can be done when creating a new forum.

### Configure the moderation settings

When creating a forum, you can set moderation-related options.

1. Select the **Moderation Options** tab in the **Forum** form.
2. Do actions in the relevant fields.


Details:

Field	Description
<b>Moderators</b>	The username of the moderators.
<b>Auto-fill the moderator's email</b>	Check this option if you want the moderator's email is auto-filled. The email address will be taken from in moderator profile.
<b>Email addresses to notify when there is a new post</b>	Enter the list of email addresses which will get the notification if any new post is created. This field will be filled automatically if the <b>Auto-fill the moderator's email</b> is checked.
<b>Email addresses to notify when there is a new topic</b>	Enter the list of email addresses which will get the notification if any new topic is created. This field will be filled automatically if the <b>Auto-fill the moderator's email</b> is checked .
<b>Moderate Topics</b>	

Field	Description
	By default, new topics must be always approved and visible to everyone. If this option is selected, new topics will be pending for approval before being viewable.

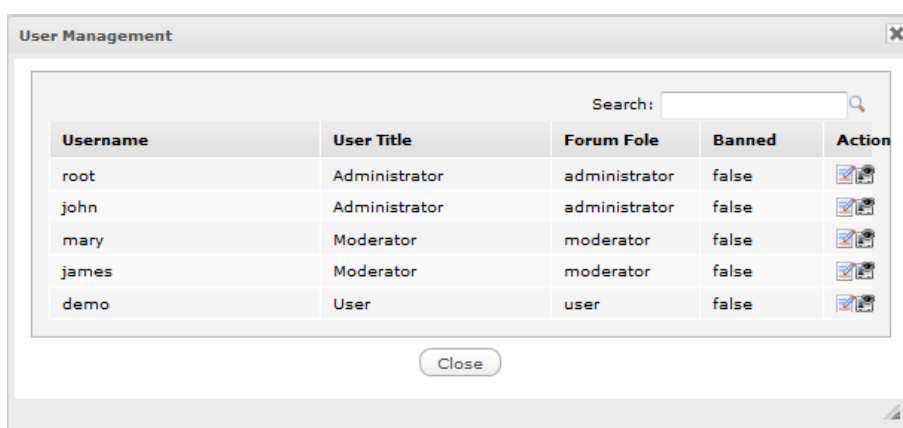
### Delete a forum

Only administrators can perform this action. When a forum is removed, all of its topics will then be deleted.


1. Go into the forum you want to remove.
2. Click  **More Actions** on the **Action** bar, then select **Delete** from the drop-down menu.
3. Click **OK** in the confirmation message to accept your deletion.

### 3.4.3.4. Manage users

To take this action, click  **Users** on the **Forum Administrator** bar. The **User Management** form will be displayed.



Username	User Title	Forum Fole	Banned	Action
root	Administrator	administrator	false	
john	Administrator	administrator	false	
mary	Moderator	moderator	false	
james	Moderator	moderator	false	
demo	User	user	false	

Here, by clicking  corresponding to the relevant user, you can do the following management actions:

- [Promote a user](#)
- [Modify user's forum settings](#)
- [Ban users](#)



#### Note

You can first search for your desired users to do the management actions quickly.

### 3.4.3.4.1. Promote a user

In the **Profile** tab, you can promote your selected user to an administrator or a moderator by editing the following fields:

Field	Description
<b>Forum Administrator</b>	Grant the Administrator role to a selected user or not. The Administration role of the default administrator cannot be edited in the <b>User Management</b> form.
<b>Moderator of Categories</b>	The list of categories moderated by the selected user. Click  to select a category.
<b>Moderator of Forums</b>	The list of forums moderated by the selected user. Click  to select a forum.

Also, you can modify the user's profile in the following fields:

Field	Description
<b>Screen Name</b>	The name displayed in <b>Forum</b> .
<b>User Title</b>	The title representing the role of user, by default. However, you can enter anything you want.

### 3.4.3.4.2. Modify user's forum settings

You can modify the forum settings set by your selected user by going to the **Settings** tab in the **User Management** form.

For the detailed descriptions in the **User Settings** form, see [User settings](#).

### 3.4.3.4.3. Ban users

This function is to ban users from the **Forum** application or specific forums and categories. To do so, go to the **Ban User** tab and tick the **Banned** checkbox.


Details:

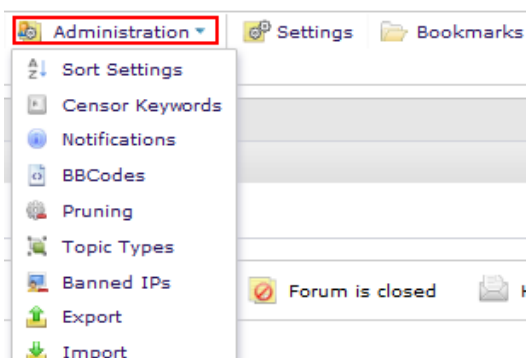
Field	Description
Duration	The interval during which the user will be banned. This field is only edited when you ban this user in the 'Banned' field. In the ban duration, the banned user only can view forums and topics but he/she cannot post replies or send messages.
Reason	The reason for banning this user.
Ban Count	The ban times of the user.
Bans Log	Other log information.
Ban Date	The date when the ban takes effect.

See also

- [Ban IPs for moderators](#)
- [Ban IPs for administrators](#)

### 3.4.3.5. Administrative tasks

All of administrative tasks can be reached via the menu that appears after clicking  **Administration** on the **Forum Administration** bar. You can select a desired action from the following drop-down menu.




The administrative tasks include the following actions:

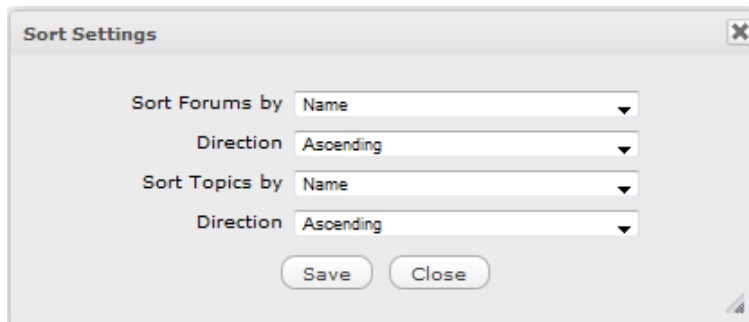
- [Set up Sort Settings](#)
- [Define censored keywords](#)

- [Customize an email notification template](#)
- [Customize a BBCode](#)
- [Set up auto-pruning](#)
- [Create a topic type](#)
- [Ban IPs](#)
- [Back up a category/forum](#)

#### 3.4.3.5.1. Set up Sort Settings

Click  **Administration** on the **Forum Administration** bar, then click **Sort Settings** from the drop-down menu. The **Sort Settings** form opens. Now, you can set properties for how forums and topics are sorted in **Forum**.

Now, you can set properties for how forums and topics are sorted in **Forum**.




The **Sort Settings** dialog box contains the following fields:

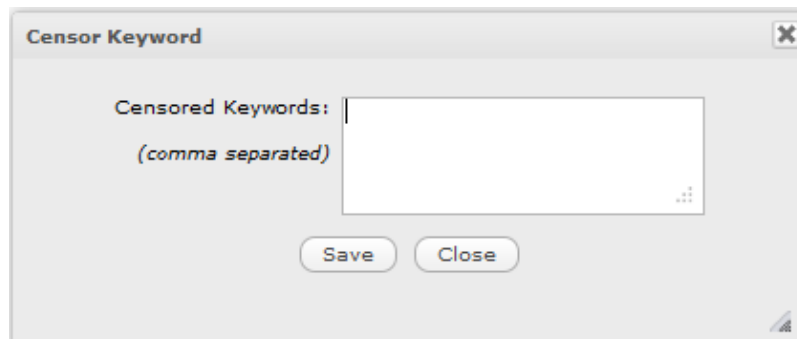
- Sort Forums by:** A dropdown menu with **Name** selected.
- Direction:** A dropdown menu with **Ascending** selected.
- Sort Topics by:** A dropdown menu with **Name** selected.
- Direction:** A dropdown menu with **Ascending** selected.

At the bottom, there are **Save** and **Close** buttons.

- **Sort Forums by:** Sort forums by several criteria: name, order, lock status, creation date, modification date, topic count and post count.
- **Direction:** Sort forums in the Ascending or Descending order.
- **Sort Topics by:** Sort topics by name, lock status, creation date, modification date, date of last post, post count, view count, attachments count.
- **Direction:** Sort topics in the Ascending or Descending order.

#### 3.4.3.5.2. Define censored keywords

Censored keywords are those which are specified as inappropriate in the **Forum** application. If any topics or posts contain censored keywords, they will be hidden until being verified by Administrators or Moderators. Click  **Administration** on the **Forum Administration** bar and click **Censor Keywords** from the drop-down menu. The **Censor Keyword** form will be displayed.



The **Censor Keyword** dialog box contains the following field:

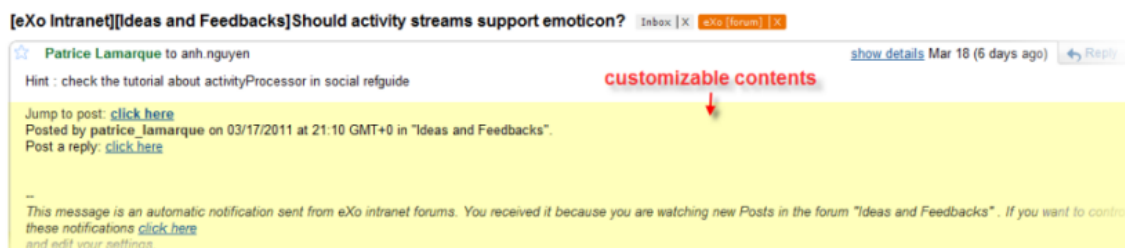
- Censored Keywords:** A text input field with the placeholder text *(comma separated)*.

At the bottom, there are **Save** and **Close** buttons.


Enter censored keywords in the **Censored Keywords** field. Keywords are separated by commas.

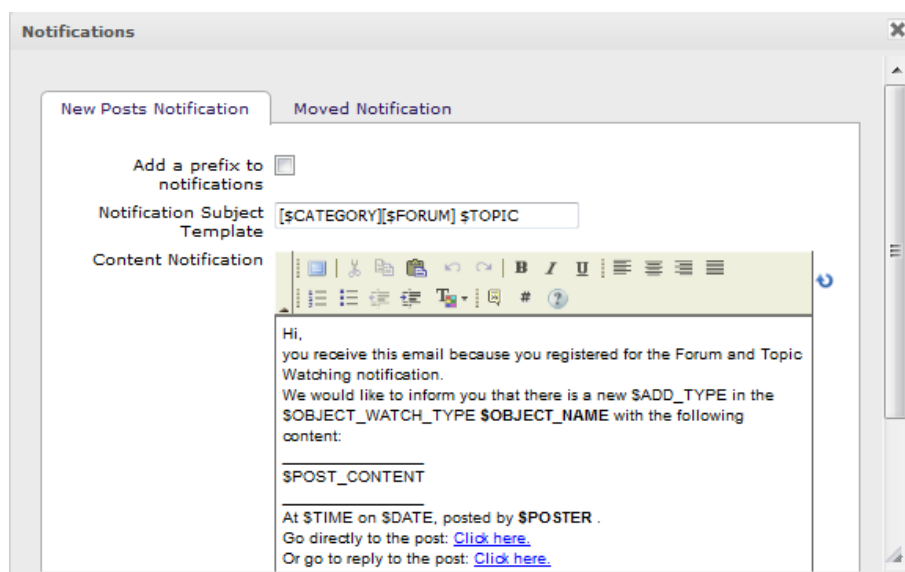
#### 3.4.3.5.3. Customize an email notification template

If there are new posts in the category or topic that a user has watched, the user will receive the email notification like this.



This section will describe how to create and edit the email templates that can be used to send email notifications to users.

Click  Administration on the **Forum Administration** bar and click **Notifications** from the drop-down menu to open the **Notifications** form.



The **Notifications** form consists of two tabs:

- **New Posts Notification:** allow you to customize the template of the email notification when there is a new post/topic in categories/forums/topics that users are watching.
- **Moved Notification:** allow you to customize the template of the email notification when a category/forum/topic/post which is being watched is moved to another location.

#### Details:

- **Notification Subject Template:** The template for the notification subject.
- **Add a prefix to notifications:** Tick the checkbox to add a prefix to the email notification.
- **Content Notification:** The template content of the email notification of new topics/posts that can be modified with the built-in Editor.

The followings are variables which can be used in the template:

#### The common variables for both tabs:

- **VIEWPOST\_LINK:** Will be replaced by the public link referring to the new topic/post.
- **\$VIEWPOST\_PRIVATE\_LINK:** Will be replaced by the private link referring to the new topic/post.
- **\$REPLYPOST\_LINK:** Will be replaced by the private link referring to the topic and a form to reply will be automatically opened.


#### The variables used in the New Post Notification tab:

- **\$OBJECT\_WATCH\_TYPE:** Will be replaced by the watched object type (category/forum/topic).

- **\$OBJECT\_NAME**: Will be replaced by the name of the watched object (category/forum/topic).
- **\$ADD\_TYPE**: Will be replaced by the newly added object type (topic/post).
- **\$ADD\_NAME**: Will be replaced by the newly added object name (topic name/post name).
- **\$POSTER**: Will be replaced by the topic/post owner.
- **\$POST\_CONTENT**: Will be replaced by the topic/post content.
- **\$TIME**: Will be replaced by the time when the topic/post was added.
- **\$DATE**: Will be replaced by the date when the topic/post was added.
- **\$CATEGORY**: Will be replaced by the category name.
- **\$FORUM**: Will be replaced by the forum name.
- **\$TOPIC**: Will be replaced by the topic name.


#### The variables used in the Moved Notification tab:

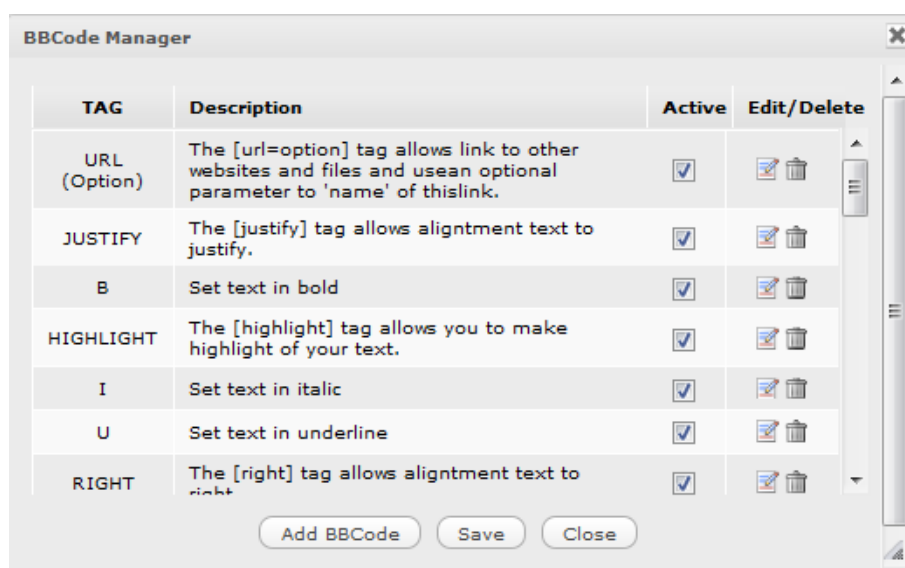
- **\$OBJECT\_PARENT\_NAME**: Will be replaced by the forum name (if moving topics) or the topic name (if moving posts).
- **\$OBJECT\_PARENT\_TYPE**: Will be replaced by the type of the moved parent object, such as forum (if moving topics) or topic (if moving posts).
- **\$OBJECT\_NAME**: Will be replaced by the name of the moved object (topic name/post name).
- **\$OBJECT\_TYPE**: Will be replaced by the type of the moved object (topic/post).

These variables are used to load the content dynamically. Thus, you should not edit them. In case the template is changed unexpectedly, you can go back to the default template by clicking . You can use the text editor to format the template as you wish.

#### 3.4.3.5.4. Customize a BBCode

By default, there are some default BBCode tags that are initialized via plugins: "[B]", "[I]", "[U]", "[FONT]", "[HIGHLIGHT]", "[IMG]", "[CSS]", "[URL]", "[GOTO]", "[QUOTE]", "[LEFT]", "[RIGHT]", "[CENTER]", "[JUSTIFY]", "[SIZE]", "[COLOR]", "[CSS]", "[EMAIL]", "[CODE]", "[LIST]", "[WIKI]", "[SLIDESHARE]". You can add, edit or delete the BBCode tags.

Click  Administration on the **Forum Administration** bar, then select **BBCodes** from the drop-down menu to open the **BBCode Manager** form.



Here, you can do the following actions:

- [Add a new BBCode](#)




- [Edit a BBCode](#)
- [Delete a BBCode](#)
- [Activate/Deactivate a BBCode](#)

3.4.3.5.4.1. Add a new BBCode

1. Click **Add BBCode** in the **BBCode Manager** form to open the **Add BBCode** form.
2. Input values into the **Add BBCode** form.

Details:

Field	Description
Tag	This is the text for BBCode, which goes inside the square bracket.
Replacement	The HTML codes that replace the user-entered BBCode.
Description	The brief description about this BBCode tag.
Example	The sample of the BBCode in use.
Use {option}	Allow BBCode tag to have option or not.
Preview	Click this button to preview your rendered BBCode.
	Click this icon to see descriptions of each field.

3. Click **Save** to finish or **Reset** to clear all input fields.


3.4.3.5.4.2. Edit a BBCode

1. Click  corresponding to the relevant BBCode tag in the **BBCode Manager** form.

2. Make changes on the BBCode tag.





3. Click **Save** to finish your changes.

#### 3.4.3.5.4.3. Delete a BBCode

Simply click  corresponding to the BBCode you want to delete in the **BBCode Manager** form, then select **OK** in the confirmation message to accept your deletion.

#### 3.4.3.5.4.4. Activate/Deactivate a BBCode


Any BBCode can be activated/deactivated.

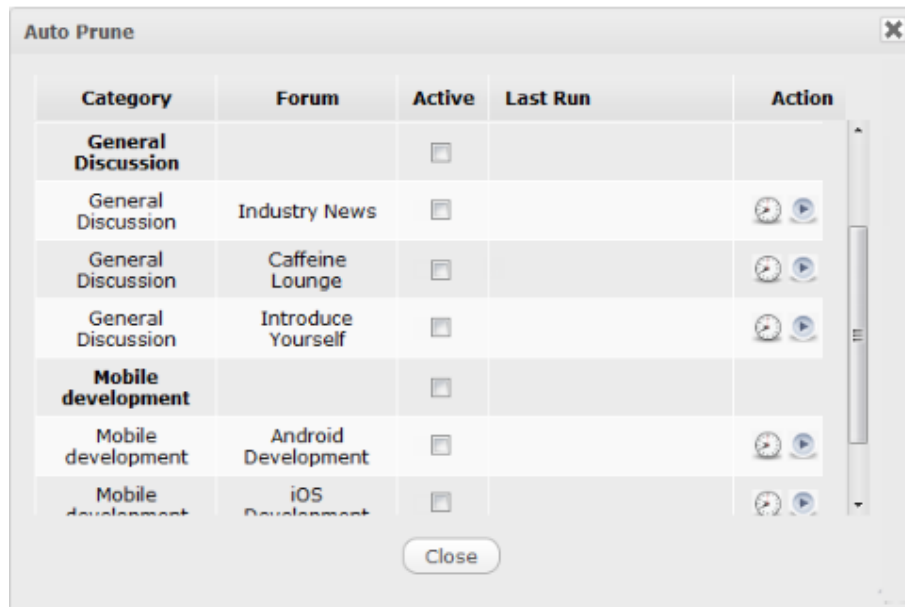
TAG	Description	Active	Edit/Delete
URL (Option)	The [url=option] tag allows link to other websites and files and use an optional parameter to 'name' of this link.	<input checked="" type="checkbox"/>	 
JUSTIFY	The [justify] tag allows alignment text to justify.	<input checked="" type="checkbox"/>	 

- To activate an existing BBCode tag, tick the relevant checkbox.
- To deactivate an existing BBCode tag, simply deselect the relevant checkbox. The entered BBCode will be displayed as the plain text.

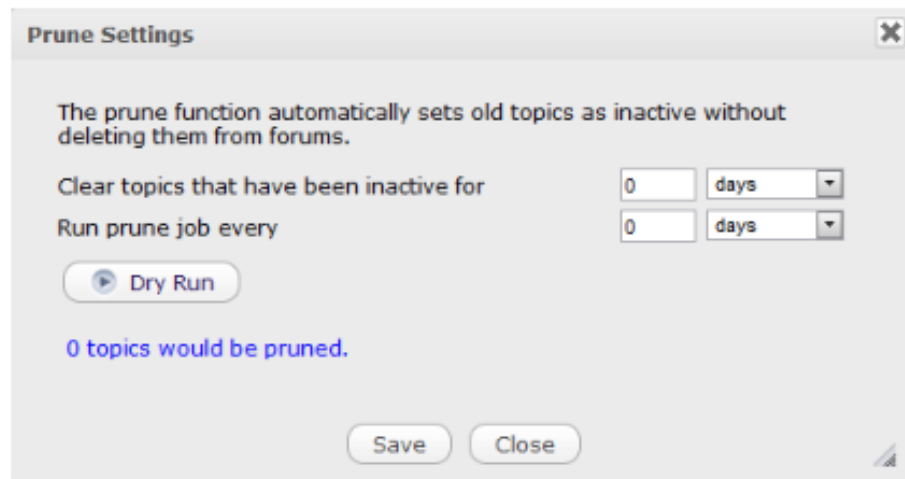
#### 3.4.3.5.5. Set up auto-pruning

The pruning allows you to clean a large amount of obsolete and inactive topics based on criteria.

1. Click  **Administration** on the **Forum Administration** bar and click **Pruning** from the drop-down menu to open the **Auto Prune** form.



2. Click corresponding to the forum you want to set the prune settings.



3. Specify the criteria.

4. Click Dry Run to check how many topics will be pruned.

5. Click **Save** to accept settings.

After setting the prune successfully, the auto-prune will be run automatically on the forum that has been set to check for the inactivate topics.

### 3.4.3.5.6. Create a topic type

The topic type is the visual indication for other users to know what is topic about at a glance. When creating a new topic, users can select the topic type that they are going to start. The administrator can define these topic types.

		Topic		Rating
		Sticky: Android development rules - Read before posting! David Klein	0	☆☆☆☆☆
		How i can change my avatar? ↗ James Davis	0	☆☆☆☆☆
		New Nebula ROM - fast and furious ↗ Mary Williams	0	☆☆☆☆☆
		Please help!!! (Pending) Jack Miller	0	☆☆☆☆☆
		News Jack Miller	0	☆☆☆☆☆

Click Administration on the **Forum Administration** bar and click **Topic Types** from the drop-down menu to open the **Topic Type Manager** form.

Topic Type Manager

Icon	Type Name	Action
	News	
	Forum Announcement	
	Important	
	PDF file	
	Rain	

Add Topic Type
Close

Click Administration on the **Forum Administration** bar and click **Topic Types** from the drop-down menu to open the **Topic Type Manager** form.

### Add a topic type

The **Topic Type Manager** form lists all topic types and allows you to add new topic types, edit or delete the existing ones.

- **The first way**

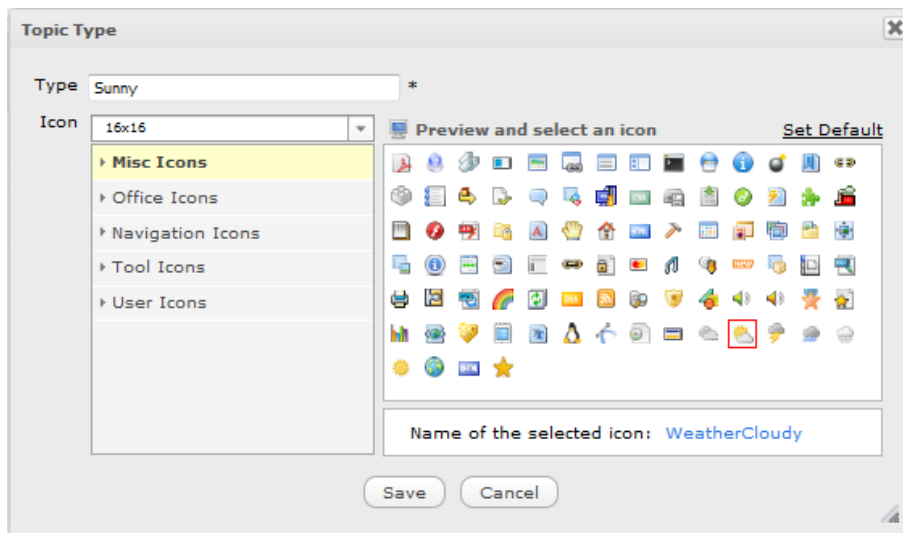
Click **Add Topic Type** in the **Topic Type Manager** form.

- **The second way**

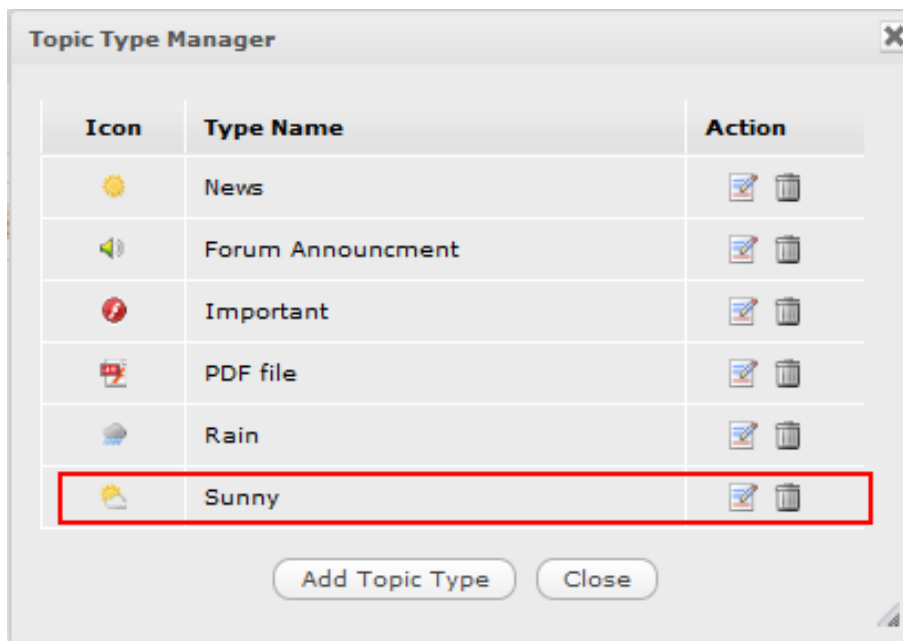
Click next to the **Type** field in the **Option** tab of the **New Topic** or **Edit Topic** form.

(Note that only administrators can see .)

2. Enter the topic name in the **Type** field, then select an icon for this topic type.



3. Click **Save** to accept adding your new topic type. You will see the new topic type added.

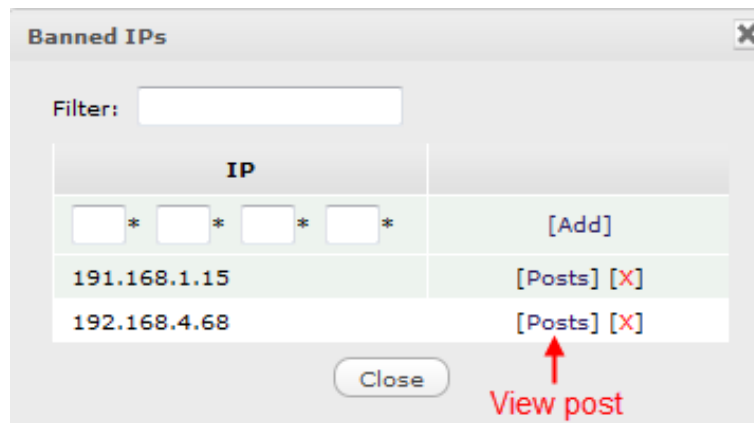


- To edit the topic type, click .
- To delete the topic type, click .

### 3.4.3.5.7. Ban IPs

Administrators can ban IP addresses used by users who abuse the forum functions or violate the forum rules and policies. All banned IPs cannot be used to add posts to all forums in the **Forum** application. Any users who use banned IPs to add post, will be recognized as the banned user. As the result, the banned user can only view in Forum.

Click **Administration** on the **Forum Administration** bar then click **Banned IPs** from the drop-down menu. The **Banned IPs** form appears.



- To ban an IP, simply enter the IP address into the IP textboxes and click **[Add]**. All banned IPs will be listed in the banned IPs table. You can view all posts which are posted from the specific banned IP or delete them from the banned IPs list.
- To view all posts submitted from a specific IPs, click the **[Posts]** link of the respective IP. These posts can be viewed and deleted by the administrator.
- To remove banned IPs from the banned IP list, click the **[x]** icon of the respective IP.

Besides, you can also filter the banned IPs if there are so many banned IPs.

To filter banned IPs, enter a part of the IPs address into filter textbox, all IPs matching with filter term will be displayed.


#### 3.4.3.5.8. Back up a category & forum

The **Export** function is a best way to back up data in the **Forum** application. This function allows you to export categories and forums in the **Forum** application into the .zip or .xml file. When a category/forum is exported, all of its forum, topics, posts and properties are also exported. This exported file can be used to import into the **Forum** application.

Backing up a category & forum includes the following actions:

- [Export a category](#)
- [Export a forum](#)
- [Import a category](#)
- [Import a forum](#)

##### 3.4.3.5.8.1. Export a category

1. Click  **Administration** on the **Forum Administration** bar.
2. Click **Export** from the drop-down menu to open the **Export Categories** form.

**Details:**

Field	Description
<b>File Name</b>	Enter the name of the exported file.
<b>Export All</b>	Check this option to export all data in <b>Forum</b> , such as all categories, user profiles and forum statistics.
<b>Only Categories</b>	Check this option to export the selected categories only.


3. Select categories and enter the file name into the **File Name** field.

4. Click **Save**.

### 3.4.3.5.8.2. Export a forum

This function is used to export forums and all topics inside the **Forum** application into the .xml or .zip file.

#### The first way

1. Go into a forum and click  **More Actions** on the **Action** bar.
2. Click **Export Forum** from the drop-down menu to open the **Export Forums** form.


3. Input the file name.

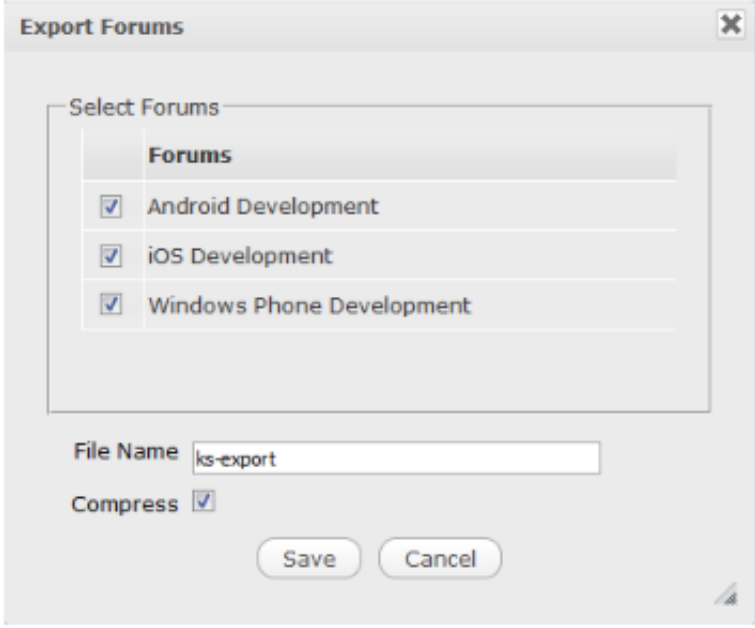
4. Tick the **Compress** checkbox to export the file into the .zip file or leave it blank to export into .xml file.

5. Click **Save** to get and store the exported file in your local device.

#### The second way

1. Go into a category containing the forum you want to export.

- Click  **Manage Category** on the **Action** bar, then click **Export Forums** from the drop-down menu.



The **Export Forums** dialog box contains a section titled **Select Forums** with a table of forums. All three forums are selected with checkboxes. Below the table is a **File Name** text box containing 'ks-export' and a **Compress** checkbox which is checked. At the bottom are **Save** and **Cancel** buttons.

	Forums
<input checked="" type="checkbox"/>	Android Development
<input checked="" type="checkbox"/>	iOS Development
<input checked="" type="checkbox"/>	Windows Phone Development


File Name:

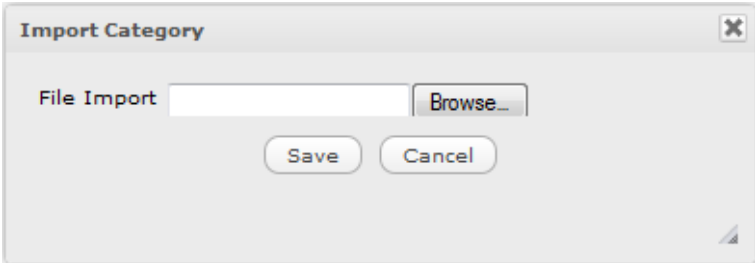
Compress: ☒

**Save** **Cancel**

- Select a forum you want to export by ticking the relevant checkbox.
- Select the **Compress** checkbox to export the file in the .zip format or leave it blank to export in the .xml format.
- Click **Save** to get and store the exported file in your local device.

#### 3.4.3.5.8.3. Import a category

- Click  **Administration** on the **Forum Administrator** bar, then click **Import** from the drop-down menu to open the **Import Category** form.




The **Import Category** dialog box has a **File Import** text box followed by a **Browse...** button. At the bottom are **Save** and **Cancel** buttons.

File Import:  **Browse...**

**Save** **Cancel**

- Click **Browse...** or the **Upload Files** field to open the **File Upload** form. Browse and select the file to import.
- Click **Save**.

#### 3.4.3.5.8.4. Import a forum

- Go into one category, then click  **Manage Category** on the **Action** bar.
- Click **Import Forum** from the drop-down menu.
- Browse and upload the selected file in the **Import Forum** form.
- Click **Save** to accept importing.

After being imported successfully, the forum and topic data will be displayed properly in the **Forum** homepage.



## 3.5. Build an Answers & FAQs system

- [Regular user](#)

Introduction to the common actions that are for regular users and step-by-step instructions on how to perform them, such as submitting/answering/commenting/sharing questions, searching, or editing user settings.

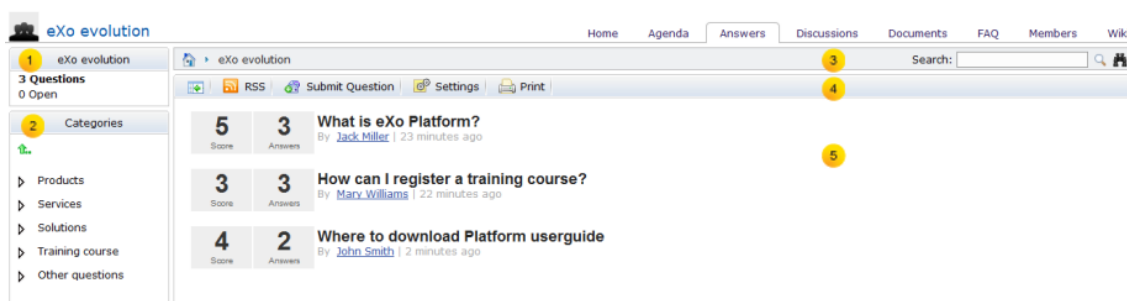
- [Moderator](#)

Introduction to tasks that are for moderators and steps to perform them, such as managing categories, moderating questions and answers.

- [Administrator](#)

Introduction to actions that are for administrators only and steps to perform them, such as setting up **Answers** and **FAQ** portlets.

Before using the features in **Answers**, you should get familiar with the **Answers** interface. Once you have logged in and accessed **Answers**, the interface looks like this:



1	The <b>Status</b> pane displays information of the currently viewed category, including the total number of open questions, pending questions and the total questions.
2	The <b>Categories</b> pane lists all categories in the hierarchical system. With one click on your desired category, you will be directed to the Answers viewing pane.
3	The <b>Breadcrumb</b> bar is to navigate between categories and sub-categories easily. This bar also includes the search box with simple and advanced options.
4	The <b>Action</b> bar is to add categories, questions, and to manage questions, import, export, print, and do settings.
5	The <b>Answers Viewing</b> pane displays all questions and information about score and the number of answers of each question in the selected category.























Remember that this interface may look different for each user group. Some actions for advanced users will not be shown in the interface when you log in as a regular user.

The following table summarizes actions which each user group can execute in Answers.

Features	Description	Administrator	Moderator	Owner	User	Guest
<a href="#">View details of the Answers application</a>	See all categories in Answer and their activated	✓	✓	✓	✓	✓

Features	Description	Administrator	Moderator	Owner	User	Guest
	questions, details of a question (its content, its answers, uploaded files, image preview).					
<a href="#">Submit question</a>	<a href="#">a</a> Submit a question with an attachment in multiple languages.					
<a href="#">Send question</a>	<a href="#">a</a> Send a question via email.					
<a href="#">Print</a>	Print all questions with their answers of a category and of its sub-categories, or print details of a question.					
<a href="#">Search</a>	Simple and advanced searches for a specific category or question.					
<a href="#">Watch/Unwatch category</a>	<a href="#">a</a> Watch a category to receive email notifications on new questions or any changes. If you do not want to receive email notifications any longer, unwatch the category.					
<a href="#">RSS</a>	Subscribe by RSS.					
<a href="#">View user profile</a>	View the profile of a specific user:					

Features	Description	Administrator	Moderator	Owner	User	Guest
	questions, answers or comments.					
User settings	Define user preferences: Sort type, Sort by.	✓	✓	✓	✓	✗
Comment on a question	Give opinions on a specific question in multiple languages.	✓	✓	✓	✓	✗
Vote	Vote for questions and answers by rating stars.	✓	✓	✓	✓	✗
Discuss in forum	Discuss a question in the forum. When a question is discussed, it becomes a topic in Forum.	✓	✓	✓	✓	✗
Manage category	Add, edit, delete and move categories.	✓	✓	✓	✗	✗
Export	Export answers in the format of a .xml or .zip file to back up data.	✓	✓	✗	✗	✗
Import	Import data into Answers from a .xml or .zip file.	✓	✓	✗	✗	✗
Moderate question	Add or edit a question in multiple languages, delete and move questions.	✓	✓	✗	✗	✗
Answer question	Give an answer for a question in the rich text format.	✓	✓	✗	✗	✗

Features	Description	Administrator	Moderator	Owner	User	Guest
<a href="#">Edit an answer</a>	A question could have multiple answers in multiple languages that can be edited separately.					
<a href="#">Activate/Deactivate a question</a>	Activate/inactivate a specific question. Inactivated questions are hidden and regular users cannot view.					
<a href="#">Approve/Disapprove a question [150]</a>	Set the approved/disapproved status to a specific question. The disapproved question is hidden in the Approve mode and normal users cannot view the unapproved question.					
<a href="#">Activate/Deactivate an answer [150]</a>	Set the activated/inactivated status to a specific answer. The inactivated answer is hidden and normal users cannot view the inactivated answer.					
<a href="#">Approve/Disapprove an answer [150]</a>	Approve/disapprove a specific answer. The					

Features	Description	Administrator	Moderator	Owner	User	Guest
	disapproved answer is also hidden and regular users cannot view.					
Promote a comment to answer	Promote a comment to be an answer of a question.	✓	✓	✗	✗	✗
Initialize Answers	Create a category and assign the moderator role.	✓	✗	✗	✗	✗
Set properties of Answers	Define basic properties (for example, Order Type, Order by, Notify content, theme, icon) and advanced properties (for example, enabling RSS, vote, comment) and more.	✓	✗	✗	✗	✗
Set up the FAQ portlet	Add and configure the FAQ portlet on the page.	✓	✗	✗	✗	✗

**Note**


**Owners** are those posting questions or answers. Actually, they are regular users but can perform some extra actions on their questions or answers.

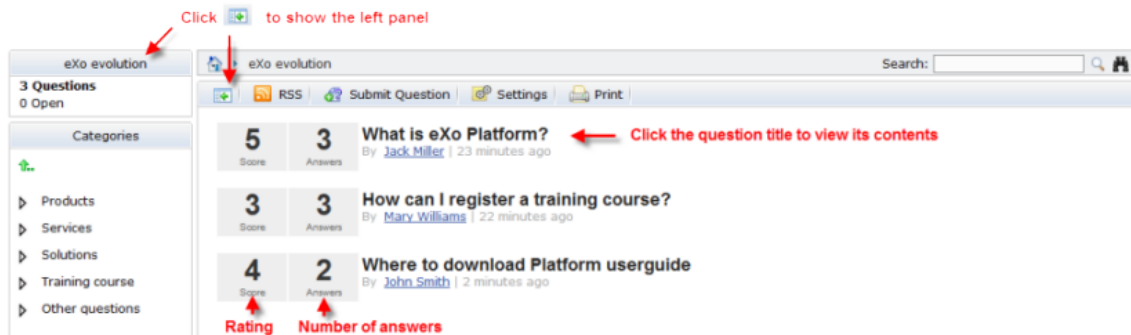
**See also**

- [About user roles](#)
- [Access Knowledge applications](#)
- [Build a wiki](#)
- [Build a forum](#)

### 3.5.1. Regular user

#### 3.5.1.1. View details of Answers

After accessing **Answers**, the left pane is hidden by default. To toggle the left pane, click  on the **Action** bar. To view details of a category, simply left-click it to open its details in the right pane.



Here, you can view all activated questions of this category, some basic information of questions, such as authors, scores, number of answers.


To view details of a question, simply click it to open its details, including its content, answers and comments, uploaded files. Here, you can also preview the attached image, or download the attached files.


See also

- [Search](#)
- [Print](#)

#### 3.5.1.2. Submit a question

The **Answers** application allows you to raise your questions on any issues and helps you find the best answer.

1. Right-click the category/sub-category where you want to submit your question, then select  **Submit Question** from the drop-down menu;

Or, go into the category that you want to submit questions, then click  **Submit Question** on the **Action** bar.

The **Submit Question** form appears as below.

**Submit Question**

Question : How can subscribe to eXo news letter?

Details : Anyone knows how can I get news letters from eXo Platform?

Language : English (Default)

Author : demo

Email : jack.miller@acme.exoplatform.com

Attach Files : [Attach a file](#)

Save Cancel

2. Type your question into the **Question** field.

In this form, you can also:

- i. Give details to your question into the **Details** field.
- ii. Select your desired language in the **Language** drop-down list.
- iii. Enter your email in the valid format, such as *username@abc.com* into the **Email** form.
- iv. Attach different-typed files to your question by clicking the **Attach a file** link. The max size for the attachment is 20Mb.

To remove the attached files, click respective  next to the file attachments.

3. Click **Save** to complete submitting your question.

A message will inform that your question has been added successfully.

If you submit a question to the [moderated category](#), a message informs that your question needs to be approved before being displayed in that category.

#### See also

- [View details of Answers](#)
- [Edit a question](#)
- [Answer a question](#)
- [Comment on a question](#)
- [Send a question to others](#)
- [Discuss a question in forum](#)
- [Rate a question](#)

### 3.5.1.3. Edit a question


Regular users can only edit their own questions.

1. Open the **Edit Question** form by following one of these ways:

#### The first way

- Right-click the question that you want to edit, then select **Edit** from drop-down menu.

**The second way**

- Click a question, then select  as below.



2. Make changes on your question. You can add more or remove the language options, attach files, approve or disapprove the question and its answers.

3. Click **Save** to accept your changes.

**See also**

- [View details of Answers](#)
- [Submit a question](#)
- [Comment on a question](#)
- [Send a question to others](#)
- [Discuss a question in Forum](#)
- [Rate a question](#)

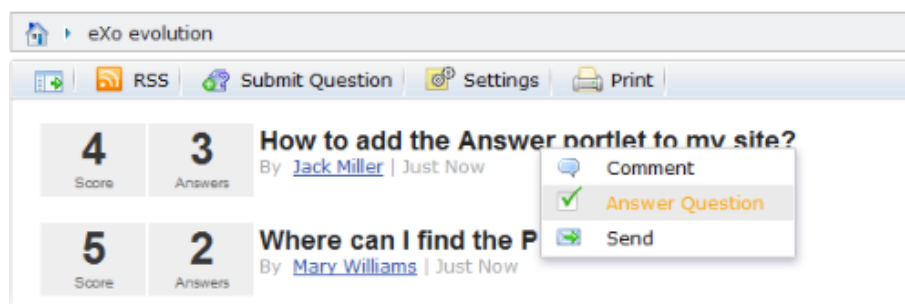
**3.5.1.4. Answer a question**

A question may have multiple answers and each can be moderated separately.

1. Open the **Answer** form by following one of these approaches:

**The first way**

- Right-click the question you want to answer, then select **Answer Question**.

**The second way**

- Open a question, then click **Answer**.
2. Enter your answer into the **Answer** field.
3. Click **Save** to submit your answer.


**See also**

- [View details of Answers](#)
- [Submit a question](#)
- [Edit an answer](#)
- [Vote for an answer](#)



### 3.5.1.5. Edit an answer

Regular users can only edit their answers.

1. Click  on the top right of the answer that you want to edit.
2. Make changes on your selected answer.
3. Click **Save** to accept your changes.

See also

- [View details of Answers](#)
- [Answer a question](#)
- [Vote for an answer](#)

### 3.5.1.6. Comment on a question

You can leave comments on a question when you are not sure about the answer, or want to give your ideas. Then, the moderator can promote your comment to answer if necessary.

1. Follow one of these following ways:

#### The first way

- Click the question you want to leave comments, then select the **Comment** button.

#### The second way

- Right-click a specific question, then select **Comment** from the drop-down menu.
2. Type your comment in the text-input field.
  3. Click **Save** to finish.



#### Note

Comments can be written in different languages. However, you only can put comments on a question in multiple languages only when the question has been posted in multiple languages.

See also

- [View details of Answers](#)
- [Submit a question](#)
- [Answer a question](#)
- [Send a question to others](#)
- [Discuss a question in Forum](#)
- [Rate a question](#)

### 3.5.1.7. Send a question to others


When you find a question interesting, you can share it with others easily. Regular users cannot send pending questions.

1. Follow one of these following ways:

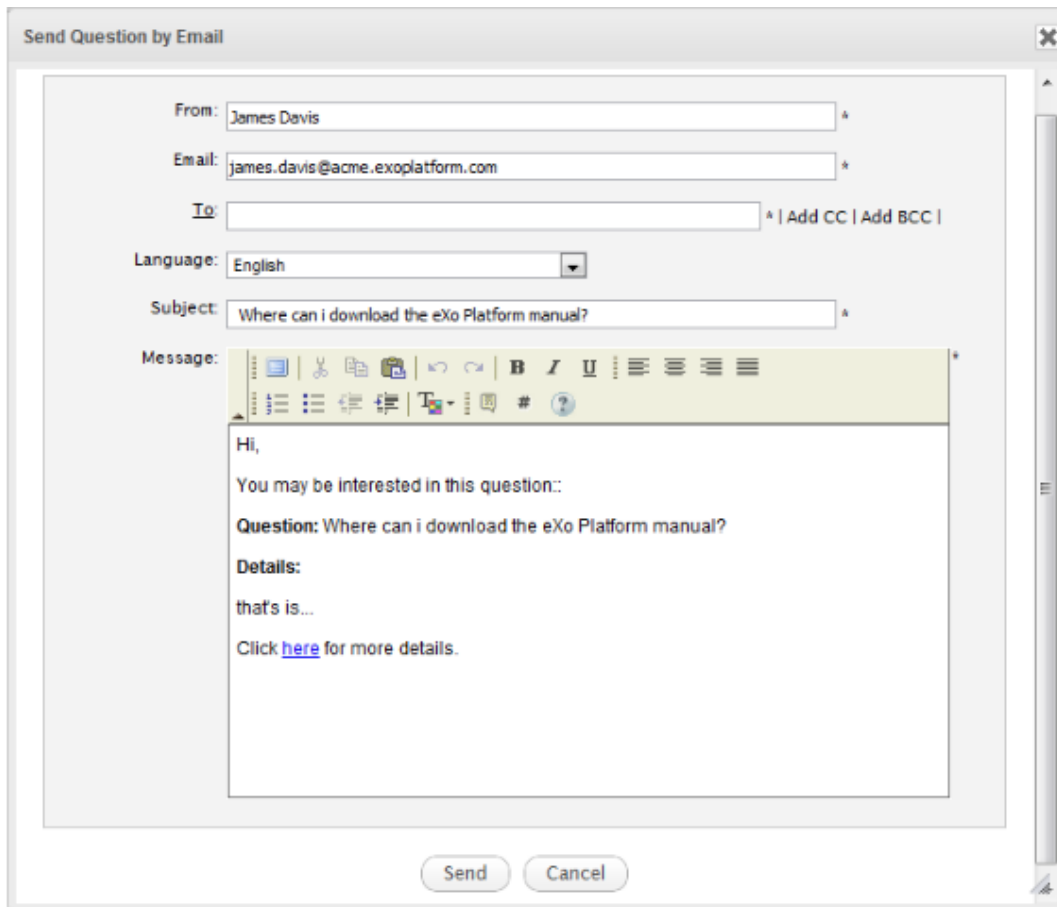
#### The first way

- Right-click the question that you want to send, then select **Send** from the drop-down menu.

#### The second way

- Click your desired question, then select .

2. Enter the receiver's email address into the **To** field.



Send Question by Email

From: James Davis \*

Email: james.davis@acme.exoplatform.com \*

To: \* | Add CC | Add BCC |

Language: English

Subject: Where can i download the eXo Platform manual? \*

Message:

Hi,  
 You may be interested in this question:  
**Question:** Where can i download the eXo Platform manual?  
**Details:**  
 that's is...  
 Click [here](#) for more details.

Send Cancel

3. Select the display language for the question content. English is set by default.

4. Click **Send**.



#### Note

**Add CC/Add BCC** allows you to send this message to multiple receivers. Use **Add CC** if you want all receivers to refer to this message. Use **Add BCC** if you want all receivers to get this message but cannot see email addresses of other receivers.

If the submitted question has been existing in another language, you can select your desired language from the **Language** drop-down list. If you change the language, the question's subject and the message content will be changed accordingly.

The users with email addresses in the **To**, **CC** and **BCC** fields will receive this message. The receivers can click the **here** link in the content of the message to view the question in details in the **Answers** application.

#### See also

- [View details of Answers](#)
- [Submit a question](#)
- [Answer a question](#)
- [Comment on a question](#)

- [Discuss a question in forum](#)
- [Rate a question](#)


### 3.5.1.8. Discuss a question in forum

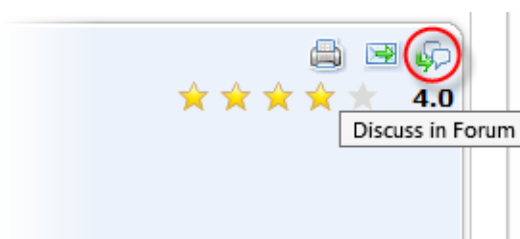
This feature is not enabled by default. Only **Administrators** can activate this feature.

When you want further discussion on a question rather than getting quick replies from **Answers**, you can make that question posted in **Forum** as a new topic. The topic created in **Forum** will have the same title and content as your question in **Answers**. All the comments will become posts in that topic. Once there is a new reply in that **Forum** topic, your question in **Answers** will be updated correspondingly.

[Discuss or view the question discussion](#)

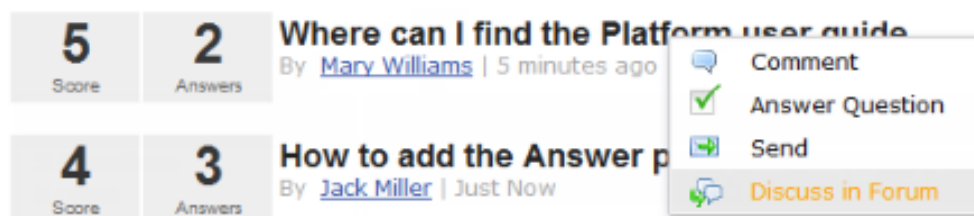
#### The first way

- Open the question and click  on the top right of the question pane.

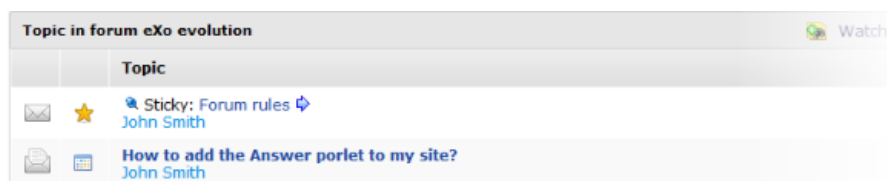


#### The second way

- Right-click a specific question and select **Discuss in Forum**.



The topic posted in **Forum** needs to be approved by the administrators or moderators before you can view it. To go to that topic, right-click the question title and select **Discuss in Forum** from the drop-down menu again.



#### See also

- [View details of Answers](#)
- [Submit a question](#)
- [Answer a question](#)
- [Comment on a question](#)
- [Send a question to others](#)
- [Rate a question](#)

### 3.5.1.9. Rate a question

If you want to evaluate the quality of the question, you can use the intuitive rating feature provided by **Answers** to the five-star scale with the ascending level from the left to the right.

1. Open the question which you want to rate.
2. Click the star on the top right of the question content.



After being rated, the vote statistics will be updated.



#### Note

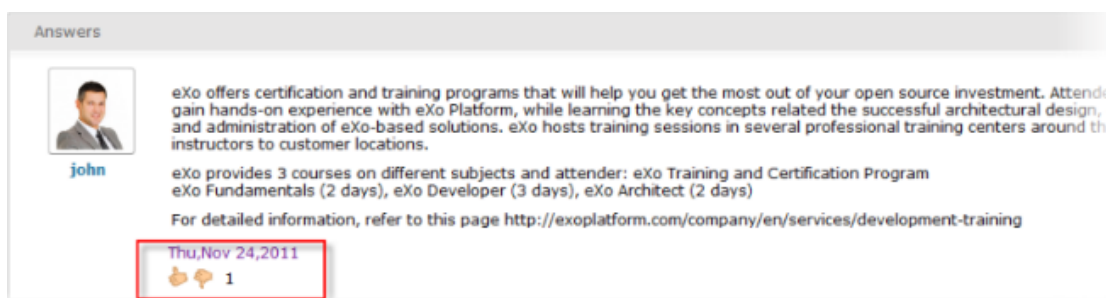
Each user can only rate a question once. Rating is not available to anonymous users.

#### See also

- [View details of Answers](#)
- [Submit a question](#)
- [Answer a question](#)
- [Comment on a question](#)
- [Send a question to others](#)
- [Discuss a question in forum](#)

### 3.5.1.10. Vote for an answer

You can vote for an answer that you find interesting and useful.



If you think the answer is good, click the thumb-up icon. If you think the answer is not good, click the thumb-down icon.



#### Note

You cannot vote both (+1 and -1) for an answer at the same time. By clicking either of thumb icons, your voting will accordingly be changed.


#### See also

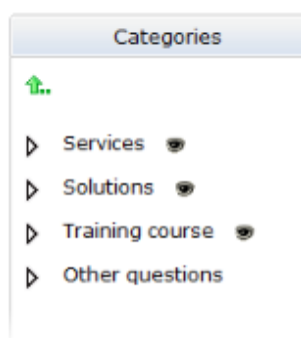
- [View details of Answers](#)

- [Answer a question](#)
- [Edit an answer](#)

### 3.5.1.11. Watch/Unwatch a category

The **Watch** feature allows you to keep track of all changes in specific categories. You will get all the updates via mail notifications if you enable the **Watch** function on a category.

To watch a category, right-click a category in the categories list and select **Watch** from the drop-down menu. For the administrator/moderator, the watched category will be marked with .



If you do not want to receive any email notifications about the watched categories, right-click your desired category in the **Categories** pane, then select **Unwatch** from the drop-down menu.

See also

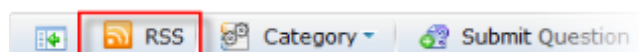
- [View details of Answers](#)

### 3.5.1.12. Subscribe to RSS feeds

You can get the latest questions in a category by getting the corresponding feed links, then use your favorite RSS client to read.

**Get the RSS link of a category**

1. Click the category you want to get the RSS feed.
2. Click the **RSS** button on the **Action** bar.



The RSS information page will appear on another tab. Depending on the browser you are using, this page may be displayed differently. Use the RSS link provided in this new page to put in the RSS reader of your choice.

See also


- [View details of Answers](#)

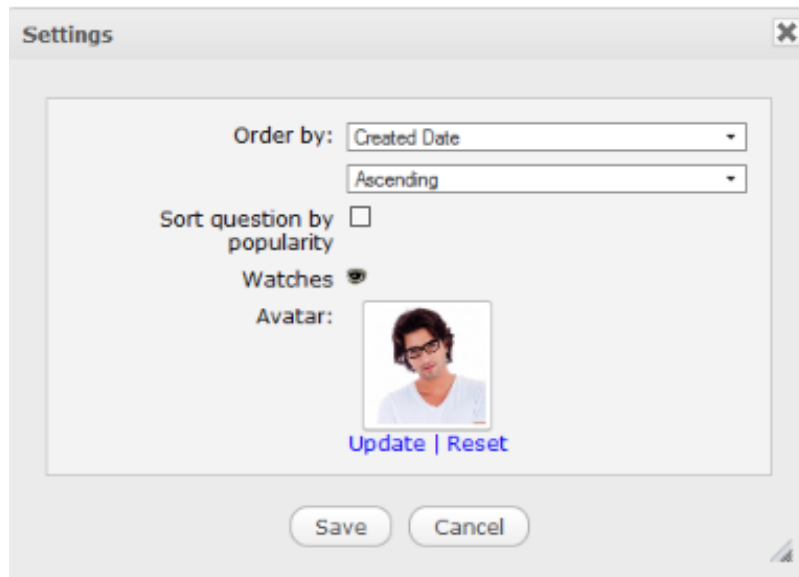
### 3.5.1.13. Edit user settings

When going to user settings, you can:

- [Change how Answers will display the entries \[140\]](#)
- [Manage your subscriptions \[140\]](#)
- [Change your avatar \[140\]](#)

**Change your user settings**

Click  on the **Action** bar. The **Settings** form will appear.



The **Settings** dialog box contains the following elements:

- Order by:** A dropdown menu set to **Created Date**.
- Ascending:** A dropdown menu set to **Ascending**.
- Sort question by popularity:** An unchecked checkbox.
- Watches:** An icon representing a watch.
- Avatar:** A square image of a man with glasses and a blue shirt.
- Update | Reset:** A blue link below the avatar.
- Save** and **Cancel** buttons at the bottom.

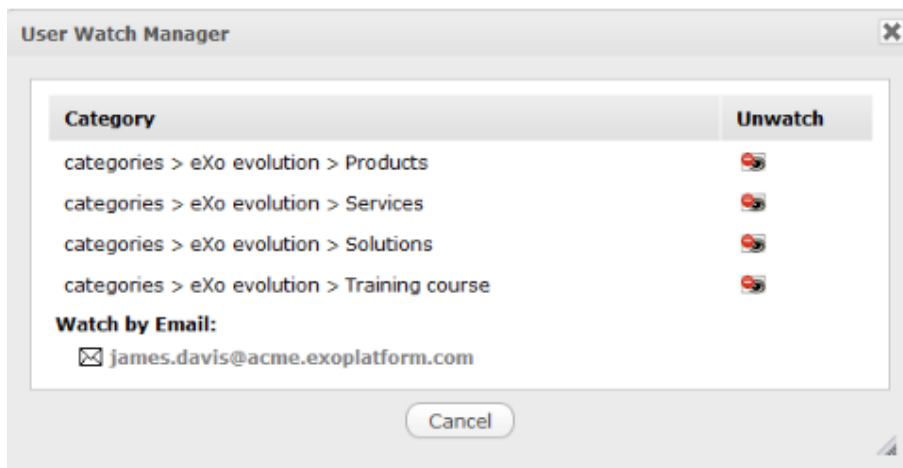
Now you can:

#### Change the display settings





You can select to display entries by created date/alphabetical order and sorted by ascending/descending type or by popularity.

#### Manage watches

1. Click  to open the **User Watch Manager** form.




The **User Watch Manager** dialog box displays a table of watched categories and an email watch option.

Category	Unwatch
categories > eXo evolution > Products	
categories > eXo evolution > Services	
categories > eXo evolution > Solutions	
categories > eXo evolution > Training course	

**Watch by Email:**  
☒ james.davis@acme.exoplatform.com

**Cancel** button at the bottom.

2. Click the category title if you want to view its details, or click  to unwatch the corresponding category.

#### Change your avatar

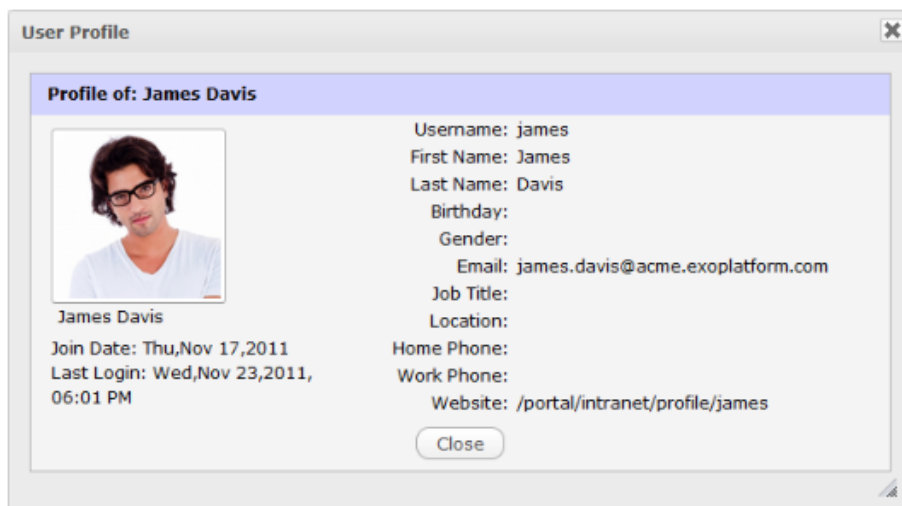
1. Click the **Update** link to open the **Upload File** form.
2. Locate and upload your desired file.
3. Click **Save** to save the changes.

See also

- [View details of Answers](#)


### 3.5.1.14. View public user profile

The function is for all logged in users. To view a specific user's profile, click his username. The profile of that user will be displayed.



**User Profile**

**Profile of: James Davis**

 James Davis Join Date: Thu, Nov 17, 2011 Last Login: Wed, Nov 23, 2011, 06:01 PM	Username: james
	First Name: James
	Last Name: Davis
	Birthday:
	Gender:
	Email: james.davis@acme.exoplatform.com
	Job Title:
	Location:
	Home Phone:
	Work Phone:
	Website: /portal/intranet/profile/james

Close

This form shows the selected user's profile, including the join date and the last login time.

See also

- [View details of Answers](#)

### 3.5.1.15. Search

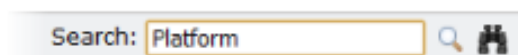
With the **Search** function, you can find your desired item, such as categories, questions, answers, or comments easily. In the **Answers** application, you can do your searches to specific search conditions easily through two types:



- [Quick search \[141\]](#)
- [Advanced search \[142\]](#)

#### Do a quick search

You can do quick searches easily by entering specific keywords into the **Search** area. All items containing the text matching your search term will be returned in the **Search Results** form.

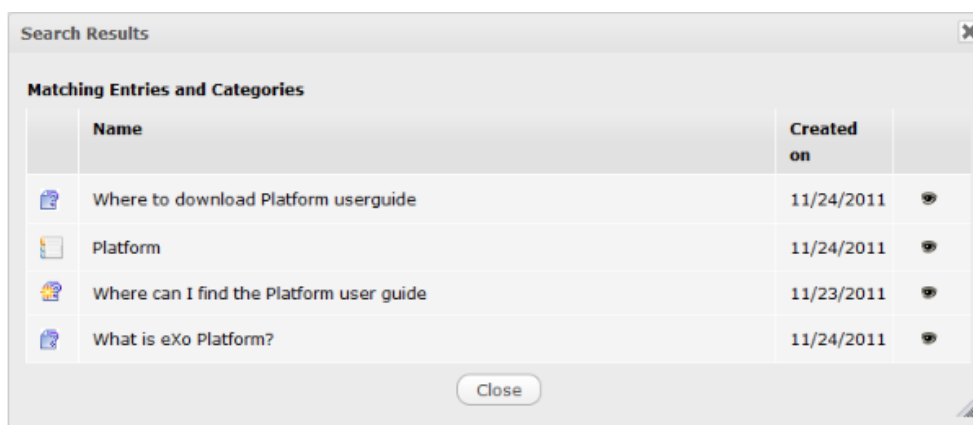
1. Enter a keyword into the **Search** field at the right corner of the breadcrumb.



Search:   

2. Click , or press the **Enter** key to perform your search.

The **Search Results** window will open with all matching categories and questions.

**Details:**

Item	Description
	The question has been answered.
	The question has not been answered.
	The category containing your entered keywords.
	Click this icon to go into a question or a category.

**Do an advanced search**

The **Advanced search** allows you to do a search with multiple criteria corresponding to the object that is expected to be found. Using the advanced search, you can find questions/categories more exactly.

1. Click on the **Search** area.
2. Define some search criteria in the **Advanced Search** form. The criteria may vary, depending on where you want to search.
  - Search in both categories and entries/questions by deselecting the categories or entries from the "**Search in**" drop-down menu. This form is set by default.

The 'Advanced Search' dialog box contains the following fields and controls:

- Term:** A text input field containing the word "Platform".
- Search in:** A drop-down menu.
- Created between:** A date input field containing "02/03/2012".
- And:** A date input field containing "02/16/2012".
- Buttons:** "Search" and "Close" buttons at the bottom.

- Search in categories by selecting **Category** from the drop-down menu. You will do a search with some specific criteria to find expected categories. Search results will only include categories.



The 'Advanced Search' dialog box shows the following search criteria:

- Term: Platform
- Search in: Categories (selected from a dropdown menu)
- Name: (empty text field)
- Is Moderate: No (selected from a dropdown menu)
- Moderator: (empty text field)
- Created between: 02/03/2012
- And: 02/16/2012

Buttons at the bottom: Search, Close.

- Search in entries/questions to find your expected questions, answers or comments by selecting **Entries** from the drop-down menu.

The 'Advanced Search' dialog box shows the following search criteria:


- Term: Platform
- Search in: Entries (selected from a dropdown menu)
- Author: (empty text field)
- Author's Email: (empty text field)
- Language: English (selected from a dropdown menu)
- Question: (empty text area)
- Answer: (empty text area)
- Comment: (empty text area)
- Created between: 02/03/2012
- And: 02/16/2012

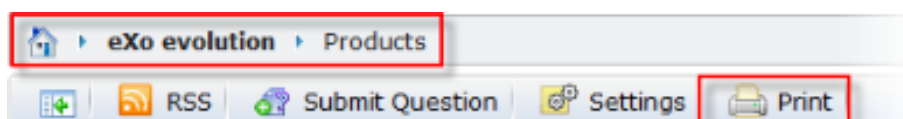
Buttons at the bottom: Search, Close.

3. Click **Search** to launch the search. All items matching your criteria will be listed in the search results pane below the **Search** form.

### 3.5.1.16. Print


**Print all questions with their answers of a category and its sub-categories**

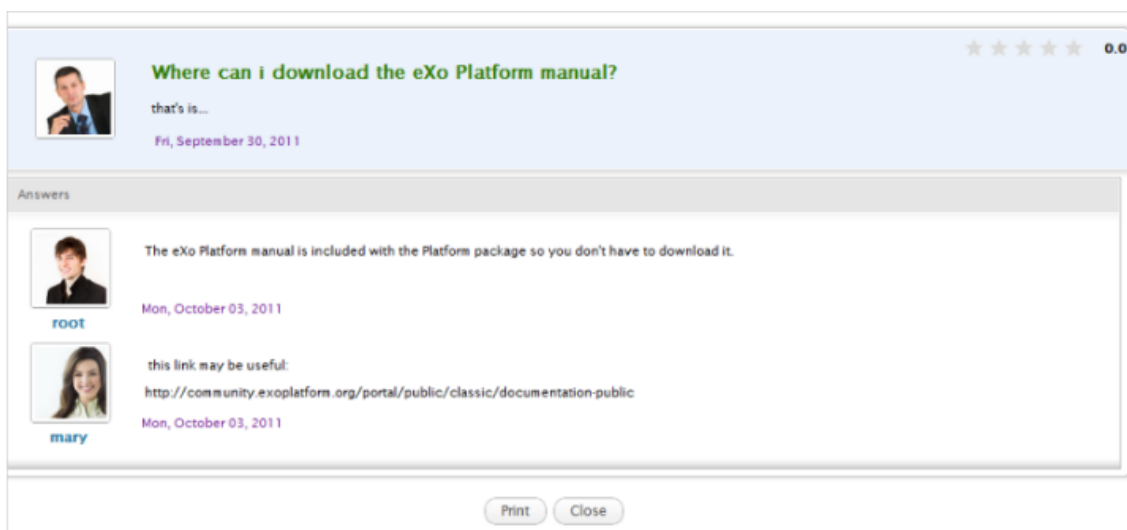
1. Select one parent category from the **Categories** list on the left pane.
2. Click  on the action bar under the selected category.



3. Click **Print** to accept printing or **Close** to quit the **Print Preview** form without printing.

### Print details of a question

1. Click your desired question.
2. Click  on the top right of the question pane. You will see the question and its details as below.



3. Select the **Print** to start printing.

### See also

- [View details of Answers](#)

## 3.5.2. Moderator

Moderators in **Answers** manage the content of questions and answers before and after they are posted to a moderated category. The Moderator can read new content (editing or removing if necessary), approve or activate answers, and more. The moderator has the category-specific role.

### 3.5.2.1. Manage categories

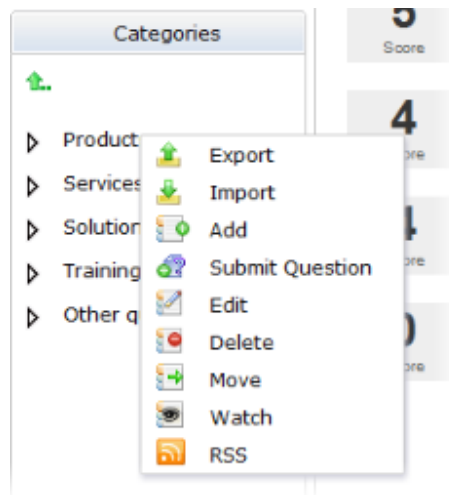
Moderator can only manage categories that he moderates.

In this section, you will learn how to manage categories. With a category, you can group all questions of a specific subject into one place.


To perform an action on a category, you can select one of these approaches:

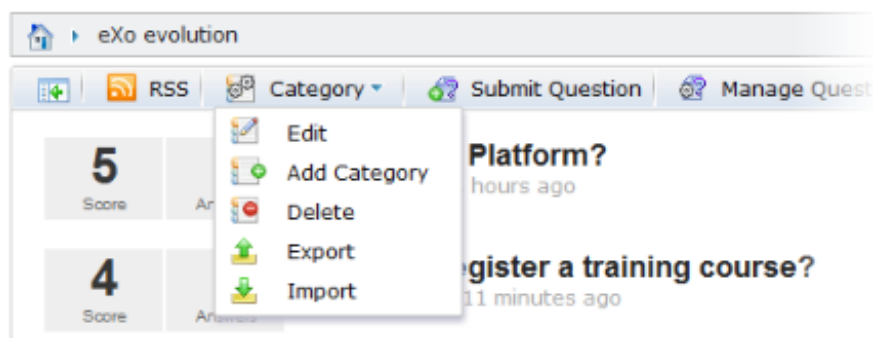
#### The first way

1. Right-click a category from the categories list.
2. Select an appropriate action from the drop-down menu.



### The second way

If you are already in a category that you moderate, you can perform all actions on this category by clicking  **Category** on the **Action** bar, then select an action from the drop-down menu.



See also

- [View details of Answers](#)

#### 3.5.2.1.1. Add a new category

Notice that only administrators can initialize **Answers** by creating first categories and assigning to moderators for each category. Moderator can only add new sub-categories in a category that he moderates.

#### Add a new category

1. Click **Category** on the **Action** bar, and select **Add Category** from the drop-down menu. The **Add Category** form will be displayed.

**Add Category**

Category  \*

Order

Restricted Audience

Description

Moderate New Questions ☒

View Question Authors ☐

Moderate Answers ☐

Moderator  \*

**Details:**

Field	Description
<b>Asterisk (*)</b>	This mark next to each field means that it is required to enter values in the field.
<b>Category</b>	The name of the category.
<b>Order</b>	The order of the category which must be in the positive integer format.
<b>Restricted Audience</b>	Select specific users/groups to be restricted from the category.
<b>Moderate New Questions</b>	Check this option if you want to moderate all newly posted questions before they are viewable.
<b>View Question Authors</b>	Check this option if you want information of the question poster to be shown.
<b>Moderate Answers</b>	Check this option to moderate all answers before they are viewable.
<b>Moderator</b>	The moderator of the category.

2. Do the same as the [Step 2](#) of adding a new category in the **Forum** application.

3. Click **Save** to complete.

### 3.5.2.1.2. Edit category properties


1. Follow one of the approaches described in [Manage categories](#).

2. Select .


3. Edit the category properties.

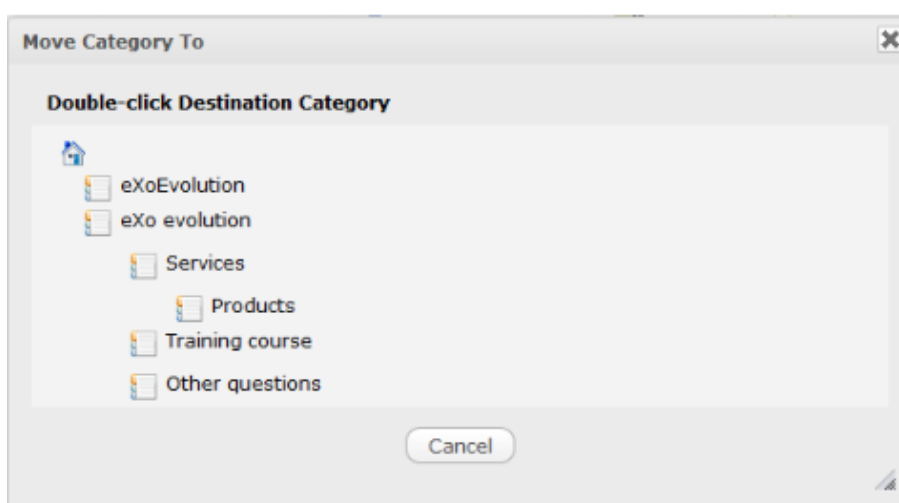
4. Click **Save** to accept your changes.

### 3.5.2.1.3. Delete a category

1. Follow one of the approaches described in the [Manage categories](#) section.
2. Select  **Delete** from the drop-down menu.
3. Click **OK** in the confirmation message to accept your deletion.

### 3.5.2.1.4. Move a category

1. Follow one of the approaches described in [Manage categories](#) to open the drop-down menu.
2. Select  **Move** .
3. Select the destination category from the list.



### 3.5.2.1.5. Export/Import a category


Both functions can be executed on all categories and questions in the **Answers** home or a specific category in **Answers**.

#### Export categories and questions

1. Click  **Export** to open the **Export** form.
2. Input the file name to export.
3. Click **Save** to accept exporting all categories and questions.

The exported file is in the .zip format and it can be used to import to **Answers** or keep it as backup.

#### Import categories and questions


1. Click  **Import** to open the **Import** form.
2. Locate the file to import, then upload the selected file.
3. Click **Save** to finish.

After being imported, all categories and questions will be displayed in the **Answers** homepage.



### 3.5.2.2. Moderate questions

#### 3.5.2.2.1. View all questions

Each question may be displayed in different ways, depending on the preset properties when it is created or edited.

Each question may be displayed in different ways, depending on the preset properties when it is created or edited. To view all posted questions, click  [Manage Questions](#) on the **Action** bar to open the **Manage Questions** form. Here, you can have the overview of all the posted questions in the category you manage.

#### 3.5.2.2.2. Edit a question

1. Select  [Manage Questions](#) on the **Action** bar to view all the open questions.
2. Click  next to the question that you want to edit and scroll down to see the **Edit Question** form.
3. Make changes on your question.
4. Click **Save** to save all changes.

#### 3.5.2.2.3. Approve/Disapprove a question

In a category that requires question to be moderated, any new questions will be in the unapproved status and need to be approved before being published.

There are two options when approving/disapproving questions:

- **All**: all approved and unapproved questions are displayed and visible for all users.
- **Approved**: only the approved questions are displayed while the unapproved questions are hidden.




If you select **Approved**, the **Moderate Question** function will determine the unapproved questions to display or not.

#### Approve/Disapprove a question

##### The first way

1. Right-click the question title, then select **Edit** from the drop-down menu to open the **Edit** form.
2. Select/Deselect the **Approved** checkbox.

##### The second way

1. Click  [Manage Questions](#) on the **Action** bar to open the **Manage Questions** form.
2. Click  or  to disapprove or approve the question respectively.




#### 3.5.2.2.4. Activate/Deactivate a question

When a question is activated, it will be displayed and visible to all users. If not, it will be hidden and invisible.

##### The first way

1. Edit a question to open the **Edit Question** form.
2. Select/Deselect the **Activated** checkbox.

##### The second way

1. Click  [Manage Questions](#) on the **Action** bar.
2. Click  or  to activate or deactivate the question respectively.

### 3.5.2.2.5. Delete a question

There are several ways to delete questions:

#### The first way

- Right-click your desired question, then select **Delete** from the drop-down menu.

#### The second way

- Click  **Manage Questions** on the **Action** bar, then click  corresponding to the question you want to delete.

#### The third way

- Click your desired question, then click . Next, click **OK** in the confirmation message to accept your deletion.


### 3.5.2.2.6. Move a question

1. Open the **Move Question** form by following one of two ways:

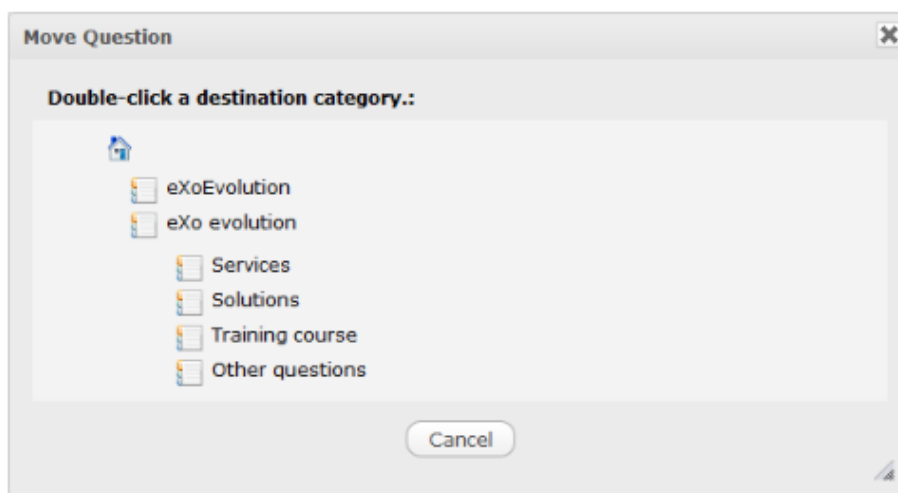
#### The first way

- Right-click your desired question, then select **Move to** from the drop-down menu.

#### The second way

- Select your desired question, then click .

2. Select the category to which you want to move your selected question.



#### Note

Only the Administrator can move questions to any areas in **Answers**.

The Moderator will be checked for permission when moving questions. The Moderator can only move questions to the category where he is also the moderator.

A notification will be only sent to the creator of the question that has been moved.

### 3.5.2.3. Moderate an answer



#### Note

On the top right of an answer, you will see icons that represent actions you can do on that answer.

#### Approve/Disapprove an answer

Click / on the top right of the answer content to approve/disapprove that answer.



#### Note

The approved answer is visible to regular users while the unapproved question is invisible.

#### Activate/Deactivate an answer

Click / on the top right of the answer content to activate/deactivate that answer.



#### Note

The deactivated answer is hidden to the regular users while the activated question is shown.

#### Delete an answer

To delete an answer, click on the top right of the answer content, then click **OK** in the confirmation message.

#### Leave a comment

This function enables users to log in and give comments on specific questions.

1. Follow one of the following two ways:

##### The first way

- Click the question you want to leave comments, then select .

##### The second way

- Right-click a specific question, then select **Comment** from the drop-down menu.

2. Enter your comment in the text-input field.

3. Click **Save** to finish.

#### Promote a comment as answer

If the comment is considered as the best answer for the question, it can be promoted to the answer. To do this, simply click on the top right of the comments panel.



#### Note

Comments can be written in different languages. However, you can only put comments on a question in multiple languages only when the question has been posted in multiple languages.



### 3.5.3. Administrator



#### Note

The administrators have the global role and take care of the entire management tasks.

#### 3.5.3.1. Set up the Answers portlet

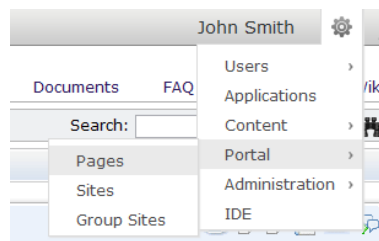
When adding the **Answers** portlet to a page, you have to configure this portlet to make it work in your desired way.


##### Configure the Answers portlet























1. Open the page edit mode via one of the following ways:

- **The first way**

i. Click  --> **Portal** --> **Page** on the **Administration** bar.



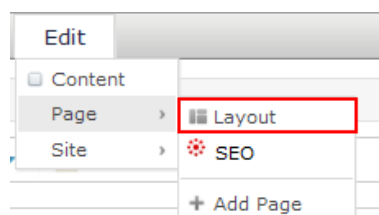
ii. Click  that corresponds to the page containing the **Answers** portlet in the **Page Management** page.

Title	Site Name	Type	portal	
Page Id	Title	Access Permission	Edit Permission	Action
portal::acme::overview	Overview	[Everyone]	editor:/platform/web-contri	 
portal::acme::news	News	[Everyone]	editor:/platform/web-contri	 
portal::acme::products	Products	[Everyone]	editor:/platform/web-contri	 
portal::acme::searchResult	SearchResult	[Everyone]	editor:/platform/web-contri	 
portal::acme::detail	Detail	[Everyone]	*:/platform/administrators	 
portal::acme::catalog	Catalog	[Everyone]	*:/platform/administrators	 
portal::acme::printviewer	Print viewer	[Everyone]	*:/platform/administrators	 
portal::acme::pclv	Parameterized Content List	[Everyone]	*:/platform/administrators	 
portal::acme::category	Category navigation portlet	[Everyone]	*:/platform/administrators	 
portal::acme::clv	Content List Viewer Portlet	[Everyone]	*:/platform/administrators	 
portal::intranet::homepage	Home Page	[*/platform/users]	*:/platform/administrators	 

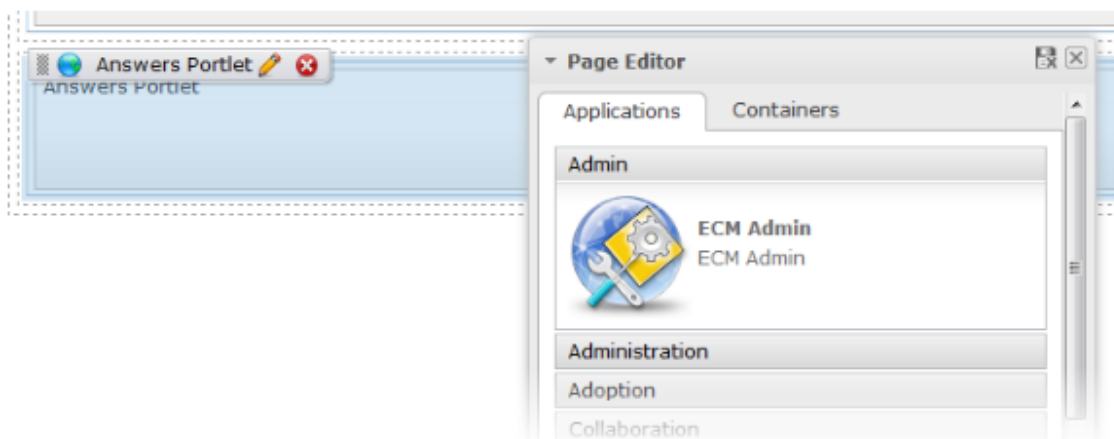
- **The second way**


i. Select a portal that contains a page with the **Answers** portlet, then open the page.

ii. Hover your cursor over **Edit** --> **Page** --> **Layout**.



Now, you should be in the **Edit** mode of the page.



3. Hover your cursor over the **Answers** portlet, then click  on the quick toolbar that appears.

4. Make changes in the **Answer Portlet** form.

 The image shows a dialog box titled 'Edit Mode' with several tabs: 'Edit Mode', 'Window Settings', 'Select Icon', 'Decoration Themes', and 'Access Permission'. The 'Edit Mode' tab is active, showing sub-tabs for 'Display Mode', 'Email Notifications', 'Discussion', and 'Category Scoping'. The 'Display Mode' sub-tab is selected, displaying the following settings:
 

- Display: All (dropdown menu)
- Order by: Created Date (dropdown menu)
- Ascending (dropdown menu)
- Enable Votes and Comments ☒
- Anonymous users may submit questions ☒
- Enable Automatic RSS ☒
- Display Avatars ☒
- Allow users to post questions in the root category ☒

 A 'Close' button is located at the bottom right of the dialog.

In this form, you can:

- [Change the display mode](#)
- [Customize the email notification template](#)
- [Enable the "Discuss in Forum" feature](#)
- [Define the default category for discussions](#)

### 3.5.3.1.1. Change the display mode

In the **Display Mode** tab, you can set all the default display properties of the **Answers** application, including:

- **Display:** Display all entries in the **Answers** application for administrators and moderators.
  - **All:** All entries, including approved and unapproved entries/questions, are displayed in a list when administrators and moderators view.
  - **Approved:** Only approved entries are displayed in the list when administrators and moderators view.
- **Order by:** The order to display all questions in the **Answers** application.
  - **Created Date:** Entries in the list are displayed to the entries's created date order.
  - **Alphabet/Index:** Entries in the list are displayed to the alphabet order.

The type of sorting entries in the list may be: **Ascending** or **Descending**.

- **Enable Votes and Comments:** Enable votes and comments to be available in **Answers**. If this checkbox is selected, users can comment and vote in **Answers**. If not, these functions are disabled.
- **Anonymous users may submit questions:** Enable anonymous users to submit questions in **Answers** or not. If this checkbox is selected, anonymous users are entitled to submit questions. If not, they cannot submit questions.
- **Enable Automatic RSS:** Enable the RSS feeds function to be available in Answers or not. If this option is selected, users can get RSS information in **Answers**.
- **Display Avatars:** Enable avatars to be viewed in **Answers** or not. If this checkbox is selected, the avatar of eXo members are shown in **Answers**.
- **Allow users to post questions in the root category:** Enable users to post questions in the root category or not.

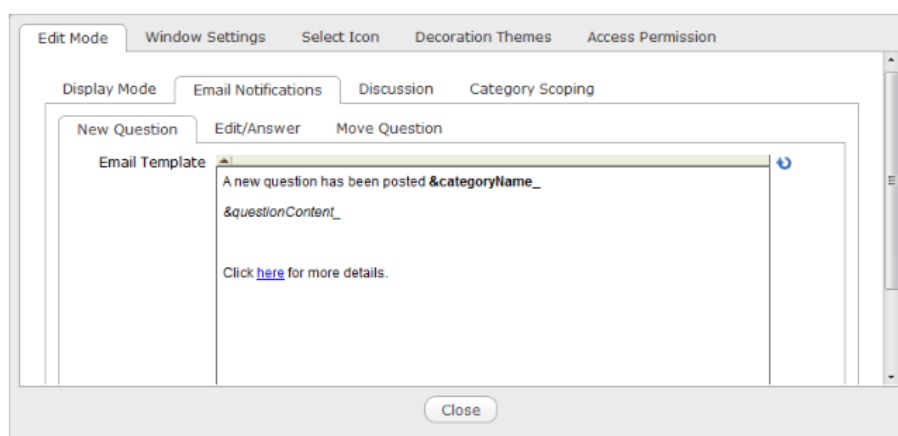
#### See also

- [View details of Answers](#)
- [Customize the email notification template](#)
- [Enable the "Discuss in Forum" feature](#)
- [Define the default category for discussions](#)

### 3.5.3.1.2. Customize the email notification template

When there are new questions or answers in the category or topic that a user has watched, the user will receive the email notification.

In the **Email Notifications** tab, change the content of the email notification manually or edit the template for each email notification.



- **New Question** tab: The content of the email notification.
- **Edit/Answer** tab: The content of the email notification that has been answered or edited.
- **Move Question** tab: The content of the email notification that notifies about the question that has been moved to another category.

The followings are variables that you can use in your template:


**&categoryName\_**: will be replaced with the watched category.

**&questionContent\_**: will be replaced with the content of the new question.

**&questionResponse\_**: will be replaced with the content of the new question's reply.

**&questionLink\_**: will be replaced with the link for going to new questions.

**&answerNowLink\_**: will be replaced with the link for going to new questions and open a pop-up form which allows you to answer the question.

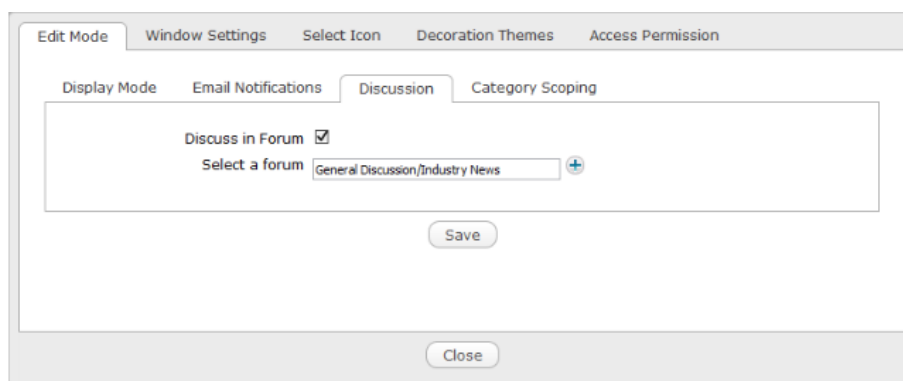
These variables are used to load the content dynamically. Thus, you should not edit them. In case the template is changed unexpectedly, you can go back to the default template by clicking . You can use the text editor to format the template as you wish.

#### See also

- [View details of Answers](#)
- [Change the display mode](#)
- [Enable the "Discuss in Forum" feature](#)
- [Define the default category for discussions](#)

### 3.5.3.1.3. Enable the "Discuss in Forum" feature

In the **Discussion** tab, enable/disable the **Discuss in Forum** function in **Answers** and set the default forum for this function by selecting/deselecting the checkbox.




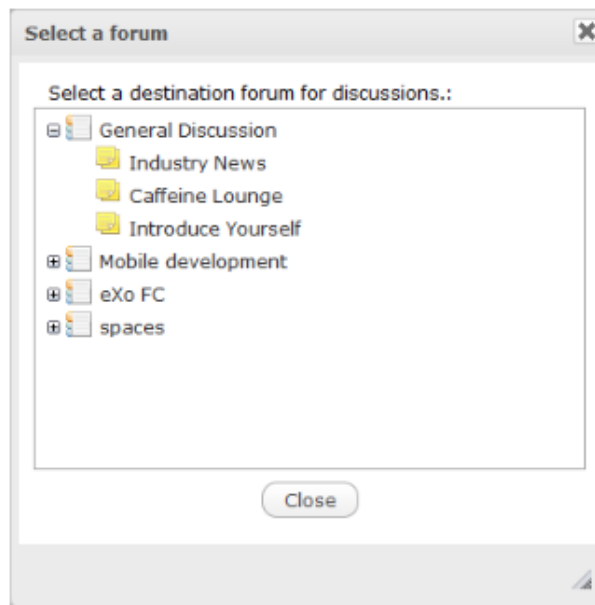
The screenshot shows a configuration window with tabs: Edit Mode, Window Settings, Select Icon, Decoration Themes, and Access Permission. The 'Discussion' tab is active. Inside, there are sub-tabs: Display Mode, Email Notifications, Discussion, and Category Scoping. The 'Discussion' sub-tab is selected. It contains a 'Discuss in Forum' checkbox which is checked. Below it is a 'Select a forum' dropdown menu with 'General Discussion/Industry News' selected. A plus icon is to the right of the dropdown. At the bottom of the window are 'Save' and 'Close' buttons.

#### See also

- [View details of Answers](#)
- [Change the display mode](#)
- [Customize the email notification template](#)
- [Define the default category for discussions](#)

### 3.5.3.1.4. Define the default category for discussions

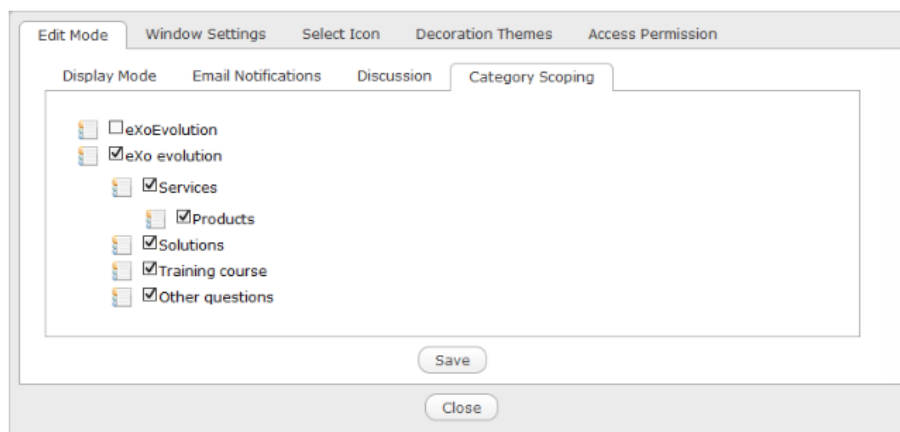
1. Click  next to the **Select a forum** field to open the **Select a forum** form in the **Discussion** tab.



2. Click a specific category/forum title to select it.
3. Click **Save** to accept saving changes in the **Discussion** tab.

#### Select the category scoping

In the **Category Scoping** tab, show/hide categories in **Answers**. The hidden category is not displayed in **Answers**.



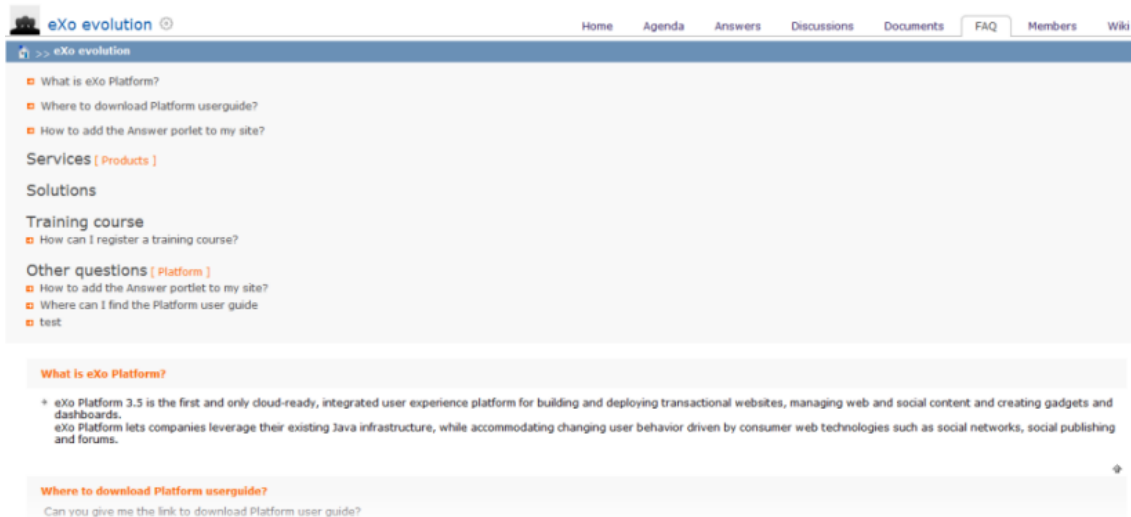
To hide/show any category, simply deselect/select its checkbox and click **Save**.

#### See also

- [View details of Answers](#)
- [Change the display mode](#)
- [Customize email notification template](#)
- [Enable the "Discuss in Forum" feature](#)

### 3.5.3.2. Set up the FAQ portlet

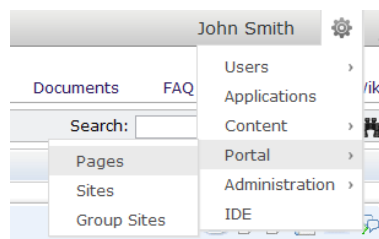
The **FAQ** portlet can be added to a page for users to view questions and answers quickly and easily.



The **Edit Mode** of the **FAQ** portlet allows you to set the properties to display questions and answers in the View mode.

### Configure the FAQ portlet

#### 1. Click **Portal** --> **Pages**.

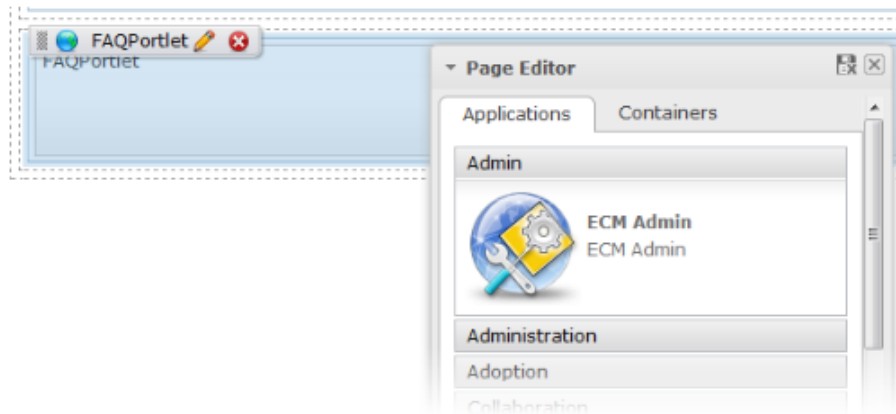


The **Page Manager** page will be displayed.

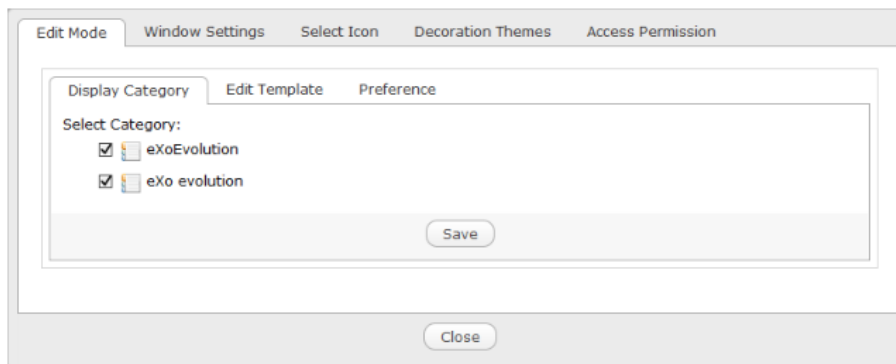
Title	Site Name	Type	portal	
Page Id	Title	Access Permission	Edit Permission	Action
portal::acme::overview	Overview	[Everyone]	editor:/platform/web-contri	
portal::acme::news	News	[Everyone]	editor:/platform/web-contri	
portal::acme::products	Products	[Everyone]	editor:/platform/web-contri	
portal::acme::searchResult	SearchResult	[Everyone]	editor:/platform/web-contri	
portal::acme::detail	Detail	[Everyone]	*:/platform/administrators	
portal::acme::catalog	Catalog	[Everyone]	*:/platform/administrators	
portal::acme::printviewer	Print viewer	[Everyone]	*:/platform/administrators	
portal::acme::pclv	Parameterized Content List	[Everyone]	*:/platform/administrators	
portal::acme::category	Category navigation portlet	[Everyone]	*:/platform/administrators	
portal::acme::clv	Content List Viewer Portlet	[Everyone]	*:/platform/administrators	
portal::intranet::homepage	Home Page	[*/platform/users]	*:/platform/administrators	

2. Click that corresponds to the **FAQ** page in the page list. Now, you should be in the page edit mode.

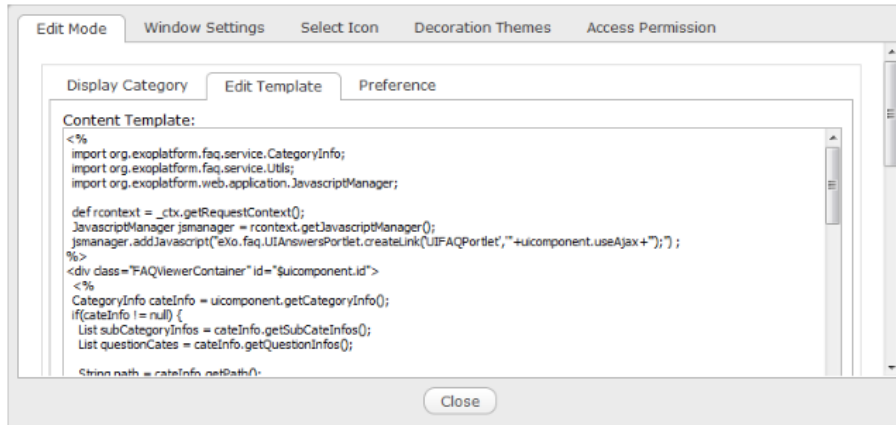
3. Hover your cursor over the **FAQ** portlet and click in the quick edit toolbar that appears.



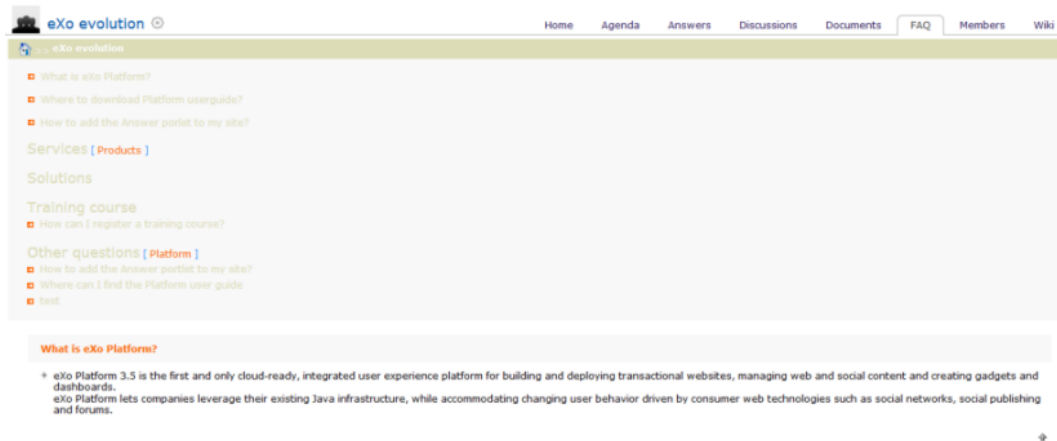
i. In the **Display Category** tab, you can control what categories will be displayed.



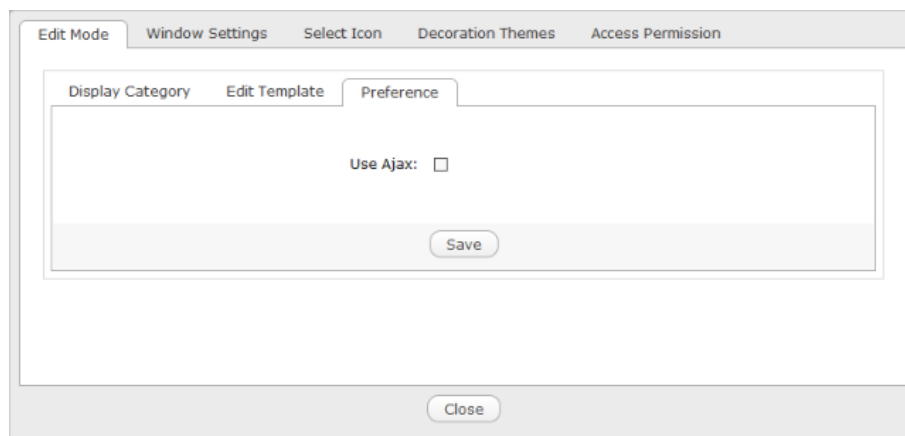
ii. In the **Edit Template** tab, you can use CSS to customize the **FAQ** template.



This is an example of the **FAQ** template after applying the new style.



iii. In the **Preference** tab, you can enable or disable the bookmarkable URLs in **FAQ**.



By not using Ajax, the **FAQ** will generate plain URLs in the links. The added benefit will be bookmarkability and better SEO as the links will be permalinks. Using Ajax, the links will be JavaScript-based and generate Ajax calls. This should make browsing faster because the whole page is not reloaded.

#### See also

- [View details of Answers](#)
- [Set up the Answers portlet](#)



# Collaborate With Your Colleagues

eXo Platform provides a set of collaborative applications which help you achieve your goals and enhance your productivity in the corporate environment. This chapter presents the following topics:

- **Manage your calendar**

Introduction to the **Calendar** application and its actions. **Calendar** allows you to schedule appointments and meetings, establish recurring activities, create multiple calendars and share calendars with others. With **Calendar**, it is easy to keep track of all important events/tasks and collaborate with other people, all in one place.

- **Manage your contacts**

Introduction to the **Address Book** application and its actions. **Address Book** is a contact manager, allowing you to organize all the contact information. You can use the contact information with other applications, such as **Mail**, **Calendar** and **Chat**. The integration between **Address Book** and other applications will help you enhance your group productivity in the collaborative environment.

- **Email your contacts**

Introduction to the **Mail** application and its actions. **Mail** is a webmail application which is smoothly integrated with **Address Book** and **Calendar**. Besides typical features of the **Mail** application, you can also add contacts, create address books or schedule your work right in **Mail**.

- **Chat with your contacts**

Introduction to the **Chat** application and its actions. **Chat** allows you to communicate with other users in your contact book quickly with an easy-to-use integrated text messaging application. You can chat with other people in real time, create chat rooms and add contacts from your **Address Book** to your friends list. This will save time and enhance the productivity when you want to have an instant communication with your contact without sending mails.

## 4.1. Manage your calendar

- **Calendar views**

Introduction to the Calendar interface and its components.

- **Manage a calendar group**

Steps to create, edit and remove a calendar group.

- **Create a calendar**

Steps to create a personal calendar, calendar for a group or a remote calendar.

- **Edit a calendar**

Steps to edit details and properties of a calendar, to set the calendar color, and to delete a calendar.

- **Export/Import a calendar**

Steps to import calendars or export calendars to a calendar application that supports ICalendar format.

- **Share a personal calendar**

Information about setting permissions on your shared calendar, steps to share your personal calendar with other users so that they can participate in all activities of this calendar.

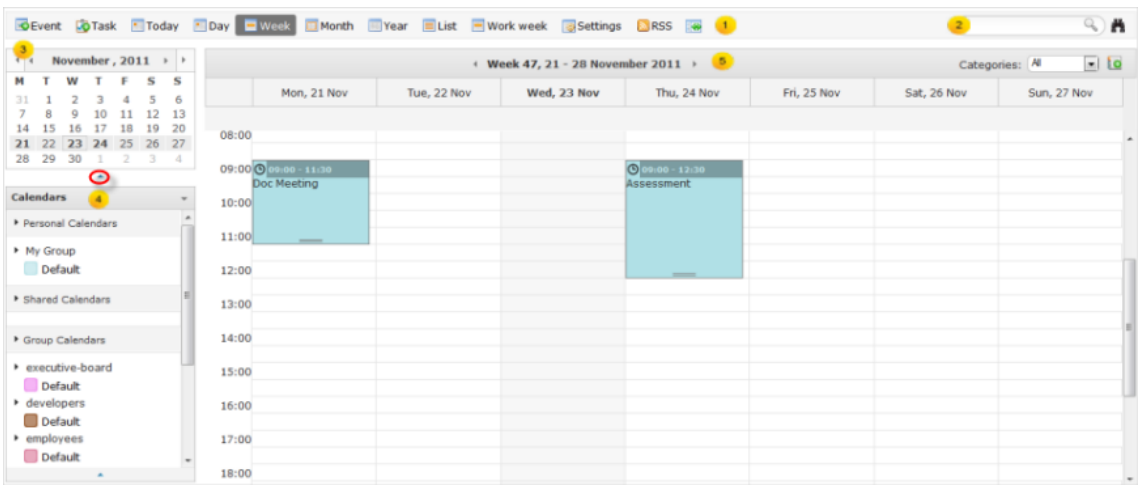
- [Schedule an event](#)  
Steps to perform common actions with events in Calendar: Create, edit, delete, import and export events.
- [Schedule a task](#)  
Steps to perform common actions with events in Calendar: Create, edit, delete, import and export tasks.
- [Search for events/tasks](#)  
Steps to find existing events/tasks according to specific search conditions.
- [More actions](#)  
Steps to perform other useful actions in Calendar to take advantage of all productivity features.
- [Add My Agenda gadget to your page](#)  
Steps to add **My Agenda** gadget to your page to list upcoming events and tasks from your personal calendar.
- [Add My Tasks gadget to your page](#)  
Steps to add the **My Tasks** gadget to your page to list upcoming tasks of the current day from your personal calendar.

See also


- [Manage your contacts](#)
- [Email your contacts](#)
- [Chat with your contacts](#)

### 4.1.1. Calendar views

The Calendar interface has 5 basic components.



Details:

Number	Description
1	The <b>Toolbar</b> contains most of actions in Calendar, such as adding an event/task, switching between view modes and more.
2	The <b>Search Pane</b> where you can perform quick and advanced searches.
3	The <b>Mini calendar</b> which can be hidden by clicking  .
4	

Number	Description
	The <b>Calendars pane</b> which includes 3 categories: Personal Calendars, Shared Calendars, and Group Calendars. Each category may include various calendar groups.
5	The <b>Calendar View pane</b> where you can create tasks/events quickly and view your own tasks/events.

**Note**

In eXo Platform, the left pane of **Calendar** is hidden by default. To show this pane, select **Toggle Left Pane** on the toolbar.


If a calendar is not selected, its events and tasks will be hidden from the **Calendar View Pane**. You can show/hide the events/tasks by simply clicking the calendar name.

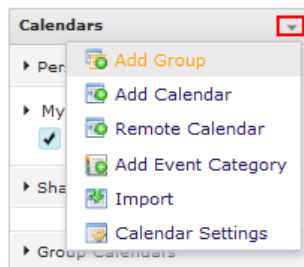
### 4.1.2. Manage a calendar group

The calendar groups allow you to categorize your calendar types easily. Each calendar group may contain one or more calendars added by users. There will be a default calendar group named **My Group** in the **Personal Calendars** category.



#### Add a new calendar group

This function allows you to organize and personalize calendars in your own way.

1. Click  at the right of the **Calendars** pane, then select **Add Group** from the drop-down menu.



2. Enter the group name, and its description in the respective fields.

Group	Actions
My Group	 

Group Name:  \*

Description:

Save Reset Close


3. Click **Save** to finish.

After you have created a Space for a group, one calendar with the same name as that of your group will be created automatically in the **Group Calendars** pane.

**Note**


After you have created a Space for a group, one calendar with the same name as that of your group will be created automatically in the **Group Calendars** pane.

The calendar group without any calendars inside it will not be displayed in **Personal Calendars**.

You can also add a new calendar group by clicking  next to the **Group** field when [creating a personal calendar \[162\]](#).

**Edit a calendar group**


This function allows you to change the name and description of a specific calendar group.

1. Hover your cursor over the calendar group that you want to edit, then click  that appears.
2. Click **Edit** from the drop-down menu to open the **Calendar Groups** form.
3. Make changes on the **Group Name** or on the **Description** fields, then click **Save** to accept your changes.


**Delete a calendar group**

Once a calendar group is deleted, all calendars inside it are also deleted.

**The first way**

1. Hover your cursor over the calendar group that you want to delete, then click  that appears.
2. Click **Delete** from the drop-down menu.
3. Click **OK** in the confirmation message to accept your deletion.

**The second way**

1. Open the **Calendar Groups** form by [adding a new calendar group \[161\]](#) or by [editing a calendar group. \[162\]](#)
2. Click  corresponding to the calendar group you want to delete in the **Groups** table.
3. Click **OK** in the confirmation message to accept your deletion.

The deleted calendar group will be removed from the **Groups** table.

### 4.1.3. Create a calendar

You may create a [personal calendar \[162\]](#) or [group calendar \[164\]](#) that can be shared with specific users or groups to your desires. You can also create a calendar which is synchronized with a [remote calendar \[165\]](#).

**Create a personal calendar****Note**


All personal calendars will be put in the **Personal Calendars** pane.

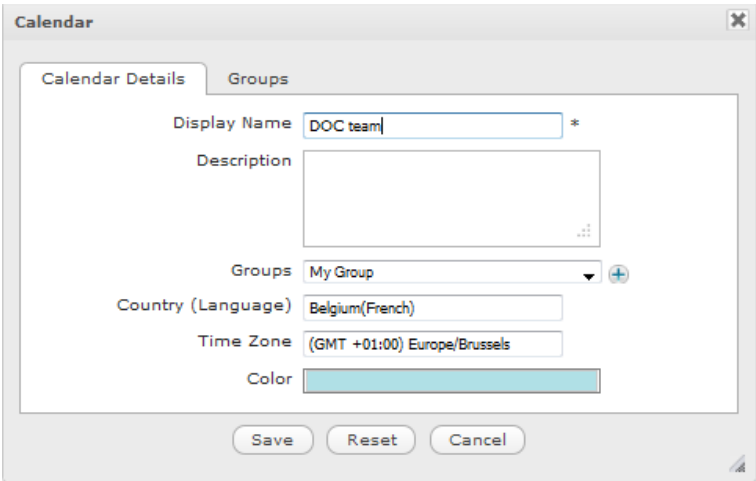
1. Follow either of the following ways to open the **Calendar** form.

The first way



Click , then select **Add Calendar** from the drop-down menu.

The second way

- i. Hover your cursor over the calendar which you want add calendar, then click  that appears.
  - ii. Click **Add Calendar** from the drop-down menu. By this way, the group that contains your new calendar is already selected.
2. Fill in fields of the **Calendar Details** tab.



Details:

Field	Description
Display Name	The calendar name which is displayed.
Description	The brief description of the calendar.
Groups	The list of groups under the <b>Personal Calendars</b> category. Click  to select one existing group that contains your calendar from the drop-down list. Or, click  to create a new group that contains your calendar. The newly created group is only displayed in the <b>Personal Calendars</b> category after you finish creating the calendar.
Country (Language)	The location and language of the calendar. You can change the default value by following steps in the <a href="#">Edit Calendar settings</a> section.
Time Zone	The display time zone for the calendar activities. You can personalize your calendar time zone by following steps in the <a href="#">Edit Calendar settings</a> section.
Color	The display color of the calendar activities that can be personalized.



Warning

If you select the **Groups** tab and tick either of the checkboxes, your added calendar will be put in the **Group Calendars** category, NOT in the **Personal Calendars** category.

3. Click **Save** to finish your creation.

### Create a group calendar



#### Note

All group calendars will be put in the **Group Calendars** pane.

1. Follow steps as stated in the [Create a personal calendar \[162\]](#) section to give details for your new calendar.
2. Select the **Groups** tab.

Show in Groups	Edit Permission
/platform/users <input type="checkbox"/>	<input type="text"/>
/organization/management /executive-board <input type="checkbox"/>	<input type="text"/>
/platform/administrators <input type="checkbox"/>	<input type="text"/>
/platform/web-contributors <input type="checkbox"/>	<input type="text"/>
/developers <input type="checkbox"/>	<input type="text"/>
/organization/employees <input type="checkbox"/>	<input type="text"/>

Buttons: Save, Reset, Cancel

3. Tick checkboxes corresponding to groups that contain your created calendar. The users of the selected groups can only view this calendar.

- Grant the **Edit** permission to specific users of your selected group as follows:

i. Click to open the **User Selector** form. This form will help you select a specific user you want to share.

Select User

- demo
- james
- john
- mary
- root

ii Click the user you want to share the **Edit** permission.

- Grant the **Edit** permission to membership types of your selected group.

i. Click to open the **User Selector** form.

ii. Select a membership type of each group. Select \* if you want to assign the **Edit** permission to all memberships of each group.



#### Note

You can select more users/memberships by repeating the above steps. The selected users/memberships will be updated in corresponding textboxes.

You can delete your selected users/memberships manually in each textbox.

4. Click **Save** to finish creating your new group calendar.

Your newly added calendar will appear in the shared groups.

### Create a remote calendar




#### Note


To create a remote calendar in the **Calendar** application successfully, you need to learn about the calendar settings of the relevant provider. For more information about types of remote calendars, refer to [this section](#).

1. Open the **Subscribe Calendar** form via one of the following ways.

#### The first way

Click , then select **Remote Calendar** from the drop-down menu.

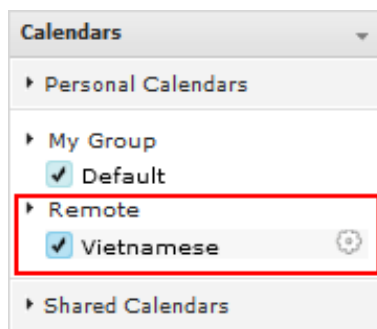
#### The second way

- i. Hover your cursor over the personal calendar which you want to add remote calendars, then click  that appears.
- ii. Click **Remote Calendar** from the drop-down menu.

2. Select the type of the remote calendar: iCalendar or CalDAV.
3. Enter the URL linking to your calendar server in the **URL** field.
4. Click **Next** to go to the **Remote calendar** form.

5. Fill in the fields. The asterisk (\*) next to each field means that it is required to enter value in the field.
6. Tick the **Use Authentication** checkbox, then enter the username and password of your remote calendar server if the remote server requires verification.
7. Click **Save** to accept your creation.

After setting up the remote calendar, you will see one auto-generated group named **Remote** in the **Personal Calendars** pane. The **Remote** group contains your remote calendars.



#### Note

After creating a remote calendar, you can **ONLY VIEW** all events and tasks which are created in the remote calendar server right in the **Calendar** application by clicking it and selecting **Refresh** from the drop-down menu.

#### More information about types of remote calendars:

- **iCalendar**: iCalendar provides a link to an online .ics file from another calendar servers, such as Google Calendar, Yahoo Calendar, or eXo Calendar (including public URL or private URL).

An example of a Google Calendar URL:

<http://www.google.com/calendar/ical/Webdesignteam%40gmail.com/public/basic.ics>

- **CalDAV**: CalDAV is an open protocol that allows you to access calendars via WebDAV. With CalDAV, you can publish and subscribe to calendars, share them collaboratively, synchronize among multiple users or devices.

**Google**: [https://www.google.com/calendar/dav/your\\_gmail\\_account@gmail.com/events/](https://www.google.com/calendar/dav/your_gmail_account@gmail.com/events/)

**Yahoo**: [https://caldav.calendar.yahoo.com/dav/your\\_yahoo\\_account@yahoo.com/Calendar/calendar\\_name/](https://caldav.calendar.yahoo.com/dav/your_yahoo_account@yahoo.com/Calendar/calendar_name/)

For example:

<https://www.google.com/calendar/dav/hoavuvn@gmail.com/events/>


### 4.1.4. Edit a calendar



#### Note

You can **ONLY** edit personal calendars and group calendars which have been created by yourself.

For group calendars which are created by another users, you can **ONLY** edit them if you are granted the **Edit** permission. Meanwhile, for shared calendars, you cannot edit them. If you are granted the **Edit** permission on them by the calendar creators, you can **ONLY** have the right on their tasks or events (for example, adding/modifying/deleting, exporting/importing).


1. Hover your cursor over the calendar which you want to edit, then click  that appears.



2. Click **Edit** from the drop-down menu. The form to edit the calendar will be different, depending on your selected calendar type. For example, if you select a personal calendar, the form only contains the **Calendar Details** tab.
3. Make changes on the calendar, then click **Save** to accept your changes.

#### Set the calendar color

The **Calendar** application allows you to select different colors for all types of calendars to recognize them easily.

1. Hover your cursor over the calendar which you want to set the color, then click  that appears.
2. Select one color from the available 32-color palette.


#### Delete a calendar

This function allows you to remove any calendars and all their events/tasks.



#### Note

You cannot delete group calendars created by ANOTHER users if you are not granted the **Edit** permission.

1. Hover your cursor over the calendar which you want to delete, then click  that appears.
2. Select **Remove** from the drop-down menu.
3. Click **OK** in the confirmation message to accept your deletion.

### 4.1.5. Export/Import a calendar




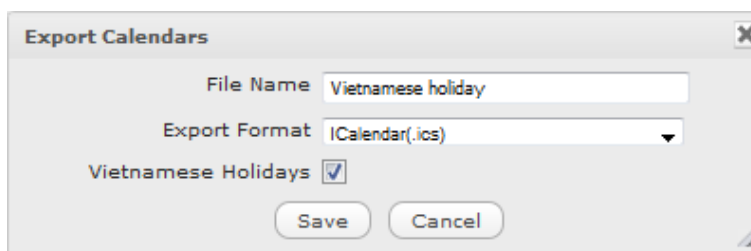
#### Note

You can only export the calendar which contains at least one event or task. Besides, for shared and group calendars, you can only export/import them if you have the **Edit** permission.

#### Export a calendar

This function allows you to export a calendar and its events/tasks into a separate file on your device.

1. Hover your cursor over the calendar which you want to export, then click  that appears.
2. Click **Export** from the drop-down menu to open the **Export Calendars** form.



3. Enter the exported file name in the **File Name** field and select its format from the **Export Format** drop-down menu. At present, only the **ICalendar(.ics)** format is supported.

**Note**

Your selected calendar cannot be exported if you untick the checkbox next to its display name.

4. Click **Save** to finish your export.

**Note**


You can only open the exported file if you have an application installed on your device that supports its format.

### Import a calendar


This function allows you to import one or more calendars stored in a file from your device to a selected calendar in the **Calendar** application.

1. Open the **Calendar** form via one of the following ways.

#### The first way

Click  at the right top of the calendars list, then select **Import** from the drop-down menu.


#### The second way

- i. Hover your cursor over the personal calendar group which you want to import, then click  that appears.
- ii. Click **Import** from the drop-down menu.

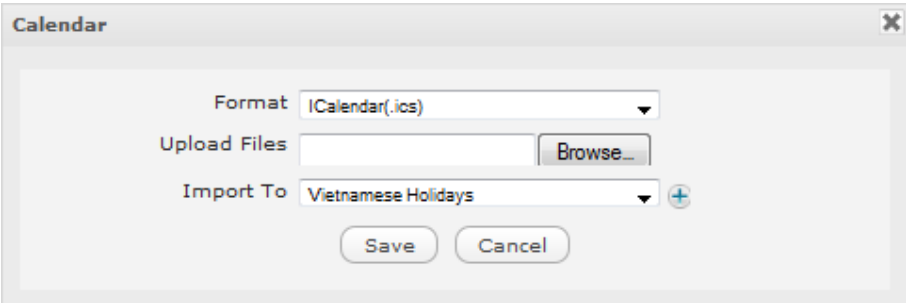
**Note**

This way is only activated for calendar groups under the **Personal Calendars** category.

#### The third way

- i. Hover your cursor over the calendar which you want to import, then click  that appears.
- ii. Click **Import** from the drop-down menu.




The **Calendar** form will appear differently, depending on your selected way.

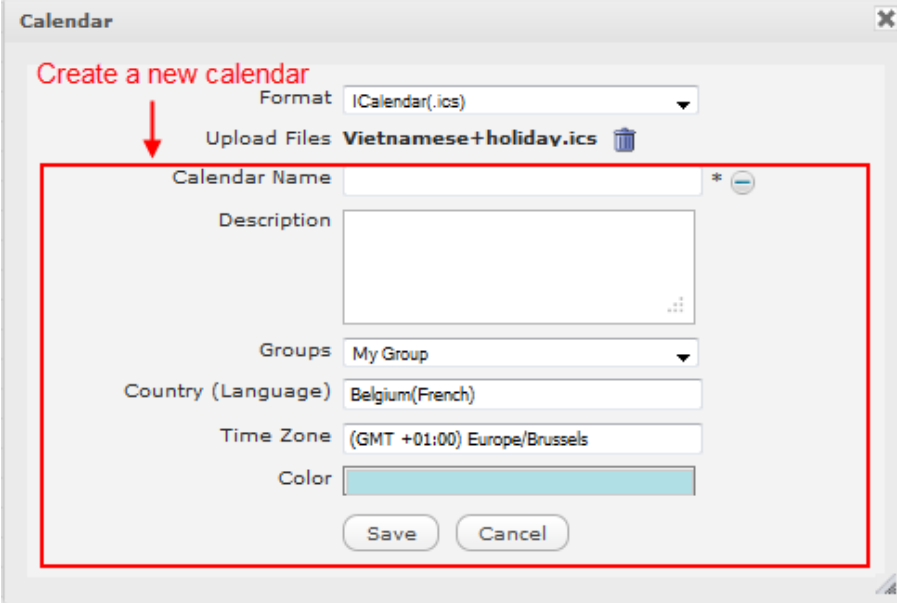



2. Select a format type from the **Format** drop-down menu. At present, the **Calendar** application only supports the **.ics** and **.csv** formats.

3. Click **Browse...** or click directly the **Upload Files** field to open the **File Upload** form.

4. Select a file from your device, then click **Open** to upload your selected file.

- Click  next to the name of your uploaded file if you want to remove it and upload again.
5. Click  next to the **Import To** field, then select the calendar to which you want to import your uploaded file from the drop-down list.
- Also, you can create a totally new calendar to which your uploaded file will be imported by clicking . The **Calendar** form now turns into the below form.



- Create the new calendar by following similar steps as stated in the [Create a personal calendar \[162\]](#) section.
    - If you select another calendar of the **Group Calendar** type, the **Edit Permission** field will appear right under the **Groups** field. For more details, see [here](#).
  - Click  to narrow the form which allows you to import your uploaded file to either of existing calendars.
6. Click **Save** to complete.

#### 4.1.6. Share a personal calendar

This function allows you to share your personal calendar with other users, so that they can participate in all activities of this calendar.

You can set permissions on your shared calendar to two levels:


- View permission** allows shared users to view the shared calendar and its events/tasks, but cannot change any information. It means that the shared users cannot add/edit/delete events or tasks, or edit, import and export the shared calendar.
- Edit permission** allows shared users to view, import and export the shared calendar or add, edit, delete events/tasks inside the shared calendar. However, you cannot edit detailed information of a shared calendar, such as its display name.

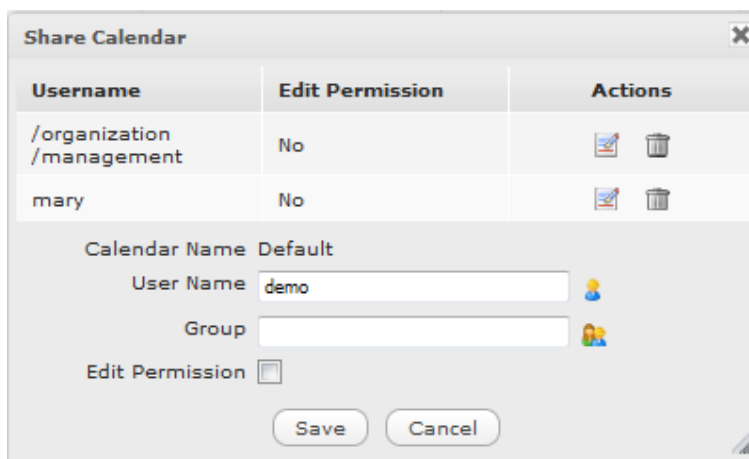


#### Note





If other users share their calendars with you, you will see shared calendars in the **Shared Calendars** category.

#### Share a personal calendar

1. Hover your cursor over the calendar which you want to share, then click  that appears.
2. Click **Share** from the drop-down menu to open the **Share Calendar** form.



The **Share Calendar** dialog box contains a table with the following data:

Username	Edit Permission	Actions
/organization /management	No	 
mary	No	 



Below the table, there are input fields for:

- Calendar Name: Default
- User Name: demo
- Group: (empty)
- Edit Permission: ☐

At the bottom are **Save** and **Cancel** buttons.

#### Details:

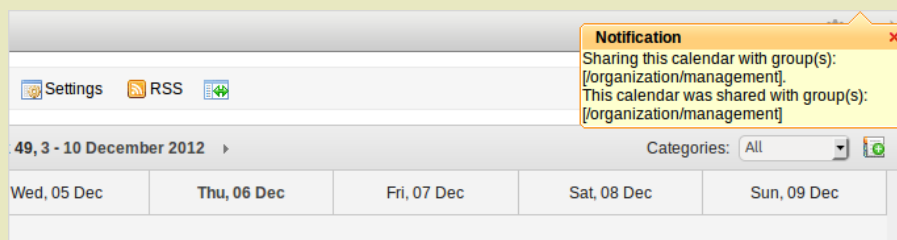
Field	Description
<b>Calendar Name</b>	The name of the calendar which you have selected to share.
<b>User Name</b>	The name of the users with whom you want to share your calendar.
<b>Group</b>	The name of the groups with whom you want to share your calendar.
<b>Edit Permission</b>	This option allows granting the edit permission on the calendar to the selected users/groups.

3. Select users or groups by manually entering the correct names into the textboxes;
- Or, click  or  to open the forms to select users or groups respectively.
4. Click the **Edit Permission** checkbox if you want to grant the **Edit** permission to your selected users/groups.
5. Click **Save** to accept sharing your personal calendar.



#### Note

- If you select to share with any group, you will see a popup showing the sharing process:




- You cannot abort your sharing till the process is finished.

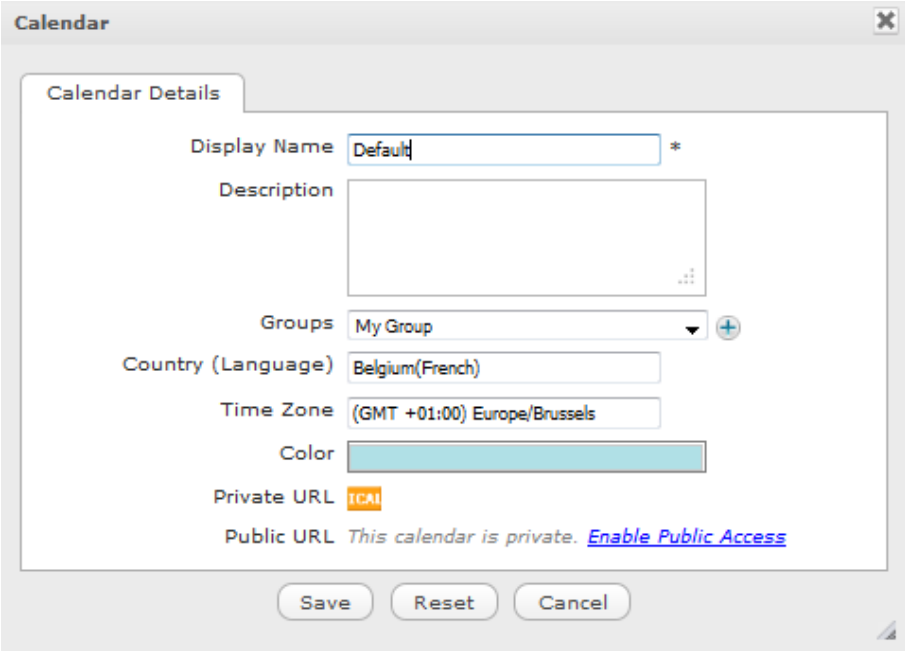
#### Share a calendar using iCal

iCal provides a link that allows users to download a \*.ics file which contains all events and tasks of a calendar. iCal is supported by many popular products, such as Microsoft Outlook, Google Calendar, Apple iCal.


- **Public URL:** The Public URL link allows you to share your calendar with other users. They do not need to have Calendar accounts to download the file, but they must use a calendar application which supports the .ics to open and view it. By default, Public URL is empty and it is only accessible when public access is explicitly enabled.
- **Private URL:** iCal is used for personal use. It means that as the creator of the calendar, you can download it to your computer and use any calendar applications which support .ics format to open it. You can also import it into another calendar.

#### Get the link to download iCal

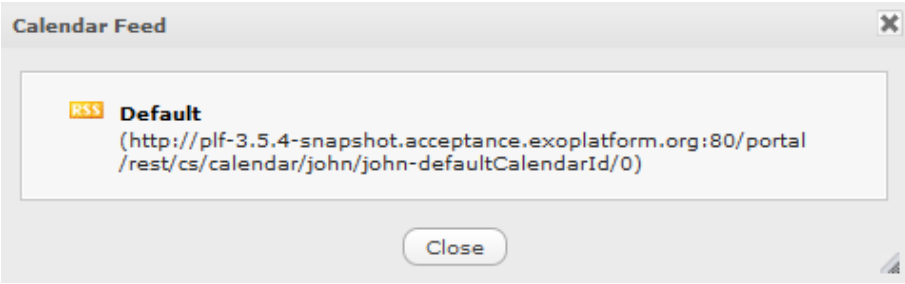
1. Hover your cursor over the calendar which you want to get iCal, then click  that appears.
2. Click **Edit** from the drop-down menu to open the **Calendar** form.



The image shows a 'Calendar' dialog box with a 'Calendar Details' tab. It contains several input fields: 'Display Name' (Default), 'Description' (empty text area), 'Groups' (My Group), 'Country (Language)' (Belgium(French)), 'Time Zone' ((GMT +01:00) Europe/Brussels), 'Color' (a blue color bar), 'Private URL' (ICAL), and 'Public URL' (This calendar is private. [Enable Public Access](#)). At the bottom are 'Save', 'Reset', and 'Cancel' buttons.

3. Get a Public URL or Private URL by clicking . For Public URL, you must assure that the iCal is public. If it is not public, simply click the "Disable Public Access" link.

One **Calendar Feed** form will pop up.



The image shows a 'Calendar Feed' dialog box. It contains an 'RSS' icon, the text 'Default', and a URL: (http://plf-3.5.4-snapshot.acceptance.exoplatform.org:80/portal/rest/cs/calendar/john/john-defaultCalendarId/0). At the bottom is a 'Close' button.

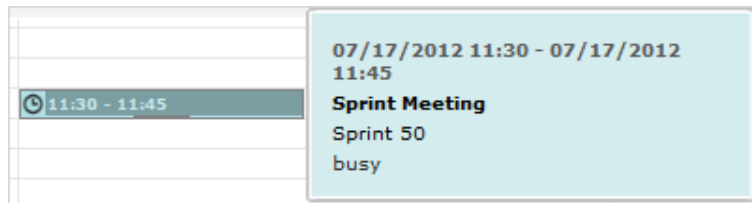
4. Copy the link in the **Calendar Feed** form, then send it to another users. The shared users can use this link to download the .ics file which can be opened in popular calendar applications, such as Microsoft Outlook, Google Calendar, Apple iCal.

### 4.1.7. Schedule an event

Before learning to schedule an event, you should know how to view an event of a specific calendar with its details:

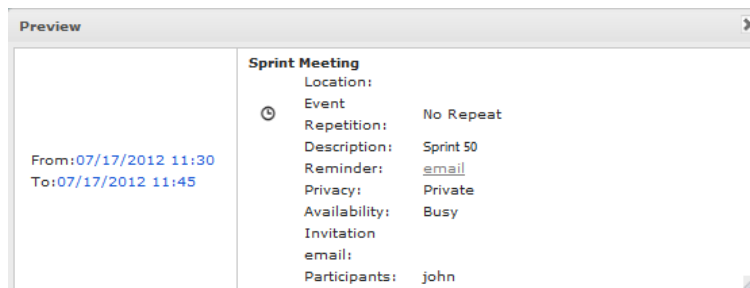
### The first way

Hover your cursor over the event to see its detailed view.



### The second way

Right-click the event in the **Calendar View** pane, then select **View** from the drop-down menu.



The **Preview** form will appear.



At the **Preview** form, if the event includes attachments, you can download them by directly clicking its title. If the attachment is an image, you can also click **View** to preview it.

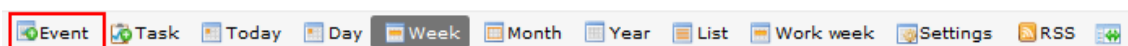
## 4.1.7.1. Create a new event

### 4.1.7.1.1. Quick add an event

1. Open the **Quick Add Event** form via either of 4 ways:

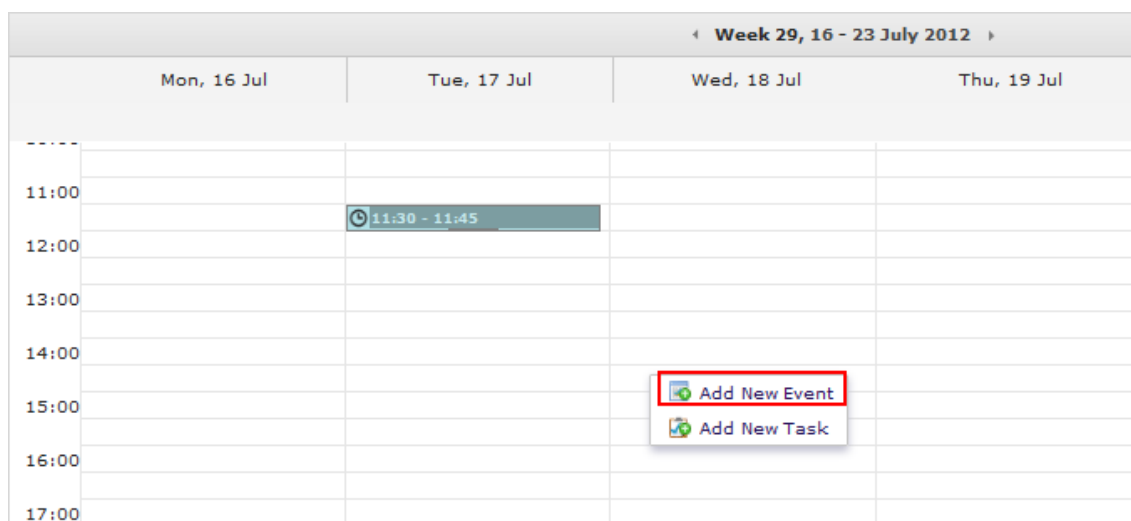
#### The first way

Click **Event** on the toolbar.




#### The second way

Right-click the **Calendar View** pane, then select **Add New Event** from the drop-down menu.



### The third way

- i. Hover your cursor over the calendar which you want to add new events, then click  that appears.
- ii. Click **Add Event** from the drop-down menu.

### The forth way

Click the appropriate time slot in the calendar view pane. Drag your cursor to alter the length of the event. For more details, see the [Drag and drop an event](#) section.

The **Quick Add Event** form will appear.

### Details:

Field	Description
<b>Event Summary</b>	The event title which is required.
<b>Description</b>	The detailed description of the event.
<b>From</b>	The starting time of the event.
<b>To</b>	The ending time of the event.
<b>All Day</b>	If the event does not have a specific time, select the <b>All Day</b> option. This option allows setting the event duration

Field	Description
	to be all day or not. If you do not check this option, you have to define the starting date/time and ending date/time. By default, the starting date and ending date is the current date.
<b>Calendar</b>	The calendar which contains the event.
<b>Event Category</b>	The category which contains the event.

2. Give information for your event. Click **More Details** to show the event in more details that allows you to define more properties of the event.

3. Click **Save** to complete.

#### 4.1.7.1.2. Add a detailed event

With a detailed event, you can:

- Save time by [creating a recurring event \[175\]](#) rather than entering each instance separately.
- [Create a reminder for upcoming events \[176\]](#) with your own notification settings.
- [Add participants to an event \[177\]](#).
- [View the availability time of participants \[178\]](#).

#### Add a detailed event


1. Open the **Quick Add Event** form, then click **More Details** to open the **Add/Edit Event** form.

2. Give details of your event in fields of tabs.

i. In the **Detail** tab, you can:

- Follow similar steps as stated in the **Quick Add Event** section.
- Also,
  - Enter the location name where the event will take place in the **Location** field.



- Select the priority level of this event, including None, Normal, High and Low, in the **Priority** field.
- Tick the **Repeat** checkbox if you want to create a recurring event. For more details, see the [Create a recurring event \[175\]](#) section.
- Click  to open the **Attach Files** form if you want to attach any files, such as map, or invitation card, with your event.

ii. In the **Reminders** tab, you can create a reminder for your event. For more details, see the [Create a reminder for upcoming events \[176\]](#) section.

iii. In the **Participants** tab, you can add participants to your event by selecting the system users or contacts from your Address Book. For more details, see the [Add participants to an event \[177\]](#) section.

iv. In the **Schedule** tab, you can view the availability time of users, or change date and time for your event and apply them into the **Details** tab. For more details, see the [View the availability time of participants \[178\]](#) section.

3. Click **Save** to finish creating your detailed event.

There will be a confirmation message. Click **Save and Send** to save and send the invitation, or **Save** to only save.

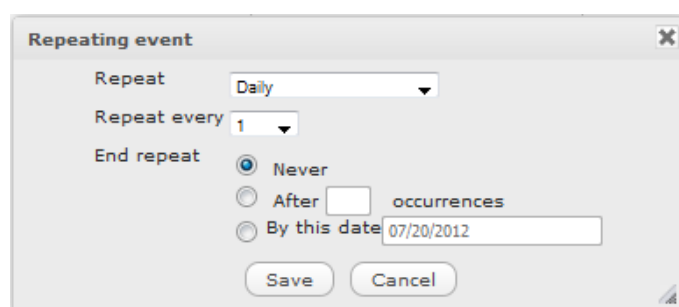
You will see the event updated in your Activity Stream of your Space or Group Space.



The event will be updated in your **Activity Stream** with its brief information, such as description, location, start time and end time. You can even deny or accept participating in this event directly in **Activity Stream** without going to the **Calendar** application.

### Create a recurring event

In the **Detail** tab, tick the **Repeat** checkbox to open the **Repeating event** form.



Here, you can define the repeating time for your event as follows:

1. Select the type for your repeating event from the **Repeat** option.

- **Daily**: The event will be repeated every day.
- **Weekly**: The event will be repeated every week.
- **Monthly**: The event will be repeated every month.
- **Yearly**: The event will be repeated every year.

2. Select the frequency for repeating your event in the **Repeat Every** option. The selected frequency will work on the **Repeat** value. For example, if you set **Weekly** in the **Repeat** option and **5** in the **Repeat every** option, the event will be repeated every 5 weeks.

3. Select the option for ending your repeating event by ticking the relevant checkbox.

- **Never:** Your repeating event will never end.
- **After [X] occurrences:** Your repeating event will end after X occurrences.
- **By this date** Your repeating event will end before your specified date. Point your cursor over the textbox and select the date from the drop-down calendar.

### Create a reminder for upcoming events

The **Calendar** application provides 2 options for reminding users who will take part in events. A reminder includes the summary information of the event, such as title, time and location. To use this feature, go to the **Reminders** tab.

#### Details:

- **Remind by Email:** This option is to remind users of upcoming events via emails. This option is set default. If you do not use this option, simply untick the checkbox.

Field	Description
Send an mail before the event starts in	The interval time that the reminder will be repeated before an event starts.
Repeat	Tick the checkbox to set the frequency for sending the email reminder before the event takes place.
Also send reminders to	The list of email addresses to which the reminder will be sent. The default value is the email address of the event creator. Click <a href="#">+ Add More</a> to add more email addresses. To delete an email address, simply click  corresponding to it.

- **Show a notification pop-up:** This option is to remind users of upcoming events via pop-up messages.

Field	Description
When the event starts in next	The interval time that the pop-up reminder will be repeated before the event starts.
Repeat	Tick the checkbox to set the frequency for sending the pop-up message before the event takes place.

### Add more emails

1. Click [+ Add More](#) to open the **Select an Email** form.

2. Tick checkboxes corresponding to email addresses you want to select;

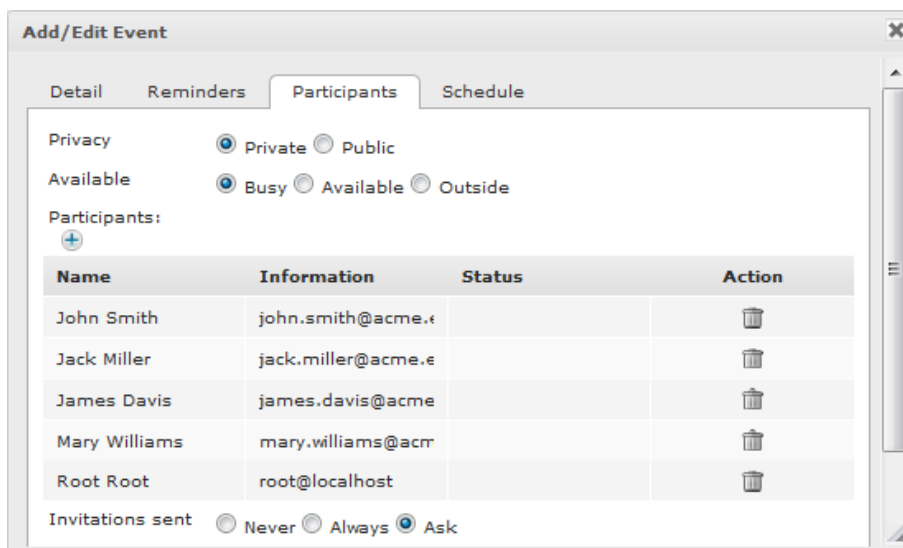
Or, use the **Search** function to search for your expected email addresses. Also, to narrow your search results, select the address book where you want to perform your search from the **Address Books** drop-down menu.

3. Click **Add** to add your selected emails, or click **Replace** to replace existing emails with your selected emails.

The list of your selected email addresses are displayed right below the **Also send reminders to** field of the **Reminders** tab.

### Add participants to an event

If you want to invite people to attend an event, go to the **Participants** tab. This tab contains options to add participants and to send invitation mails.



**Add/Edit Event**

Detail Reminders **Participants** Schedule

Privacy ☒ Private ☐ Public

Available ☒ Busy ☐ Available ☐ Outside

Participants: +

Name	Information	Status	Action
John Smith	john.smith@acme.e		
Jack Miller	jack.miller@acme.e		
James Davis	james.davis@acme		
Mary Williams	mary.williams@acm		
Root Root	root@localhost		

Invitations sent ☐ Never ☐ Always ☒ Ask

1. Select the privacy of your event by ticking the **Private** or **Public** checkbox. At present, public or private has informative meaning only.

2. Set the status of participants during the time when your event takes place.

- If **Busy** or **Outside** is ticked, the time when the participants take part in the event/task will be in red when viewing the event/task schedule.
- If **Available** is ticked, the time when the participants take part in the event/task will be in white.

3. Select participants who will take part in the event by clicking to open the **Invitations** form.

Here, you can select contacts from your Address Book or users who have registered in the system as follows:


i. Click or respectively.

ii. Select your desired contacts/users by ticking the checkboxes, or do the **Search** function to find out your contacts/users quickly. Then, click **Add** to add your selected contacts/users to the **Participants** pane.

iii. Enter your invitation message into the **Invitation Message** pane.

iv. Click **Save** to add your selected contacts/users to the **Participants** table.

- If the **Invitation Sent** checkbox is ticked, participants will receive invitations via emails. Your selected participants will be updated in the the **Participant** table. Their statuses, which may be **Yes**, **No** or **Pending**, are listed in the **Status** column. These statuses depend on the participants' confirmation when they receive invitations: **Yes**, **No** or **Not sure**.
- If the participants answer **Yes**, their statuses will be **Yes**. It means that the participants accept to join the event.

- If the participants answer **No**, their statuses will be **No**. It means that the participants will not join the event.
- If the participants answer **Not sure**, their statuses will be **Pending**. It means that the participants have not decided to take part in the event or not yet.
- Click  in the **Action** bar to remove one participant from the **Participants** list.

4. Tick one checkbox corresponding to your desired option of sending invitations to participants in the **Invitations sent**. This option is loaded by default with the value defined in the Calendar Settings.

- **Never**: Never send the invitation to any participants.
- **Always**: Automatically send the invitation to the participants.
- **Asked**: There will be a confirmation message for you to select.

The participants will receive an invitation mail, for example with the following content, which allows you to import the event directly into their calendars.



- **Agree and Import**: Accept attending at the event in the invitation mail and importing it into the calendars to remind them of this event.
- **Yes**: Accept attending at the event without importing it into the calendar.
- **No**: Refuse to attend at the event.

#### View the availability time of participants

Go to the **Schedule** tab to check the availability of the participants in a defined slot time. By default, it is the start and end time of the event which you define in the **Detail** tab. You can easily detect the schedule conflicts to manage the alternate meeting time that works best for all participants.




#### Note

This function is only for checking the availability of participants, who are the system users. It means that you cannot see the availability of participants who are selected from your **Address Book**.

#### Add participants

Click  in the left pane to select users from the **Select Users** form.

#### Delete participants

Tick the checkboxes corresponding to users in the **Participants** list, then click . The deleted users will be removed from the participants list of both **Schedule** and **Participants** tabs.

#### Apply selected date



#### Note

It is required to have at least 1 user in the **Participants** list.



1. Enter the time manually into the **From** and **To** fields;

Or, tick the **All Day** checkbox if your event will be hold for all day;

Or, hover your cursor over the time pane to visually select the available time of users. The selected period will become green and the corresponding time will be automatically updated into the **From** and **To** fields.



#### Note

If you do not see any available time for your selected date in the time pane, you can switch to another dates by clicking  /  to check another time availability of users.

2. Click the **Apply Selected Date** checkbox to accept applying the selected date and time into the **Detail** tab.

### 4.1.7.2. Edit an event

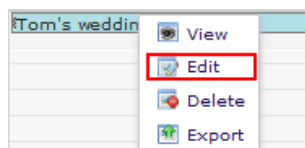
1. Open the **Add/Edit Event** form by doing one of two following ways:

#### The first way

Double-click the event you want to edit.

#### The second way

Right-click the event that you want to edit and select **Edit** from the drop-down menu.



The **Add/Edit Event** form is displayed with information that is similar when adding your event.

2. Edit information of the selected event to your desires.

3. Click **Save** to complete.



#### Note

For shared and group calendars, you can only edit their events if you have the edit permission.



#### Tip

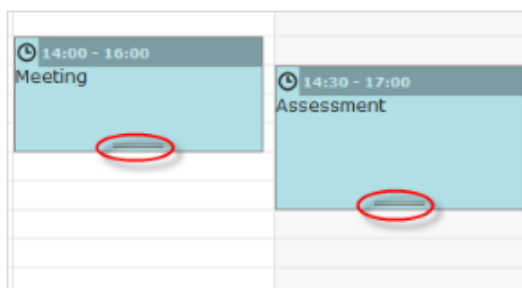
When editing an event, you can add/remove the attachment files or download them by directly clicking their titles.

If you only want to change the starting date and time of the event, you can also use the drag-and-drop feature to edit the time for the event directly on the **Calendar View pane**.

### 4.1.7.3. Drag and drop an event

The drag-and-drop feature helps you change the starting date and time of an event more conveniently. You only need to click the event, drag and drop it into another date or new time area in the **Calendar View pane**.

You also can hover your cursor over the **Scroll** button to alter the event period.



According to the features of the Calendar pane view, the drag-and-drop feature can be applied to the date and time differently.

- In the **Day** view, all events are shown in a day, so you can change the time of the event in one day only.
- In the **Week** and **Work Week** views, all events are shown in a week, so you can change both the event time and the event date.

- In the **Month** view, all events are shown in a month, so you can change the event date only. You can also change more events at the same time by ticking their checkboxes and using the drag-and-drop feature.

**Note**

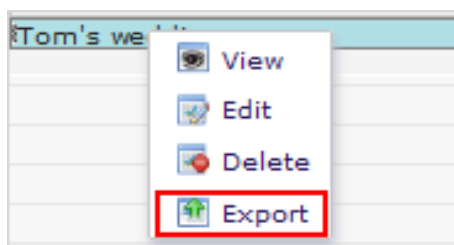
For shared and group calendars, you can only drag and drop their events if you have the **Edit** permission on these calendars. If you drag and drop an event of one calendar on which you do not have the edit permission, you will get a warning message.

#### 4.1.7.4. Export/Import an event

##### Export an event

This function allows you to export one event into a file on your device. This file can be imported to use in another **Calendar** application.

1. Right-click the event that you want to export, then select **Export** from the drop-down menu.



The **Export Calendars** form will appear.

2. Enter a file name, and select the export format.
3. Click **Save** to accept exporting the event.
4. Click **OK** in the confirmation message to save the exported file into your device.

**Note**

In fact, exporting an event means exporting a calendar with one event only. Therefore, the exported file format and the way to export an event is similar to the way to export a calendar with multiple events and tasks.

##### Import an event


You can import an event into a specific calendar. The process to import an event is similar to importing a calendar. For more details, see the [Import a calendar \[168\]](#) section.

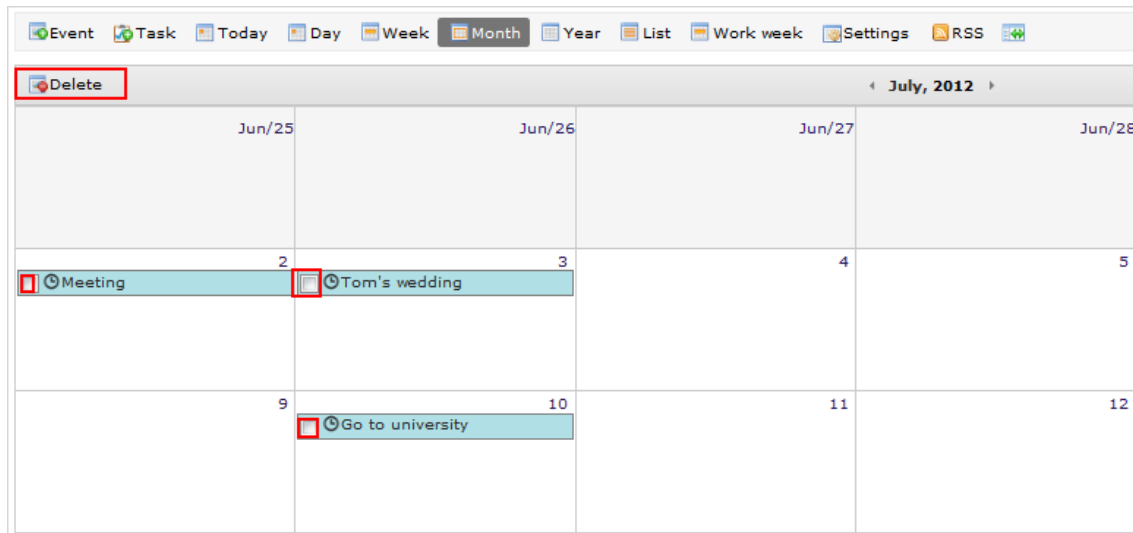
### 4.1.7.5. Delete an event

This function allows you to remove events from a calendar.

1. Right-click the event you want to delete, then click **Delete** from the drop-down menu.
2. Click **OK** in the confirmation message to accept your deletion.

#### Delete an event in the Month view

1. Tick the checkboxes corresponding to the events you want to delete.
2. Click  on the **Month** information bar.



3. Click **OK** in the confirmation message to accept your deletion.



#### Note

For shared and group calendars, you can only delete their events if you have the **Edit** permission on these calendars.

### 4.1.8. Schedule a task

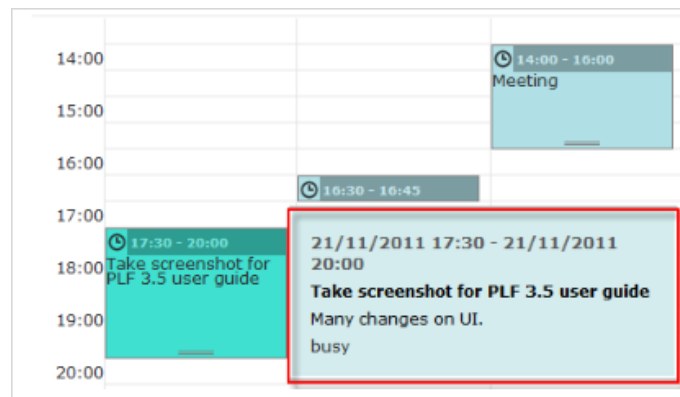
Before learning to schedule a task, you should know how to view a task with its details.

To view details of a task, do one of the following ways:

#### The first way

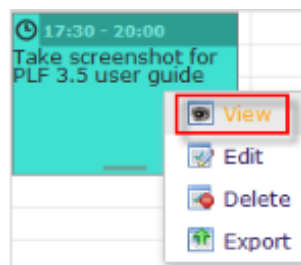
Hover your cursor over the task to open the task preview pane.



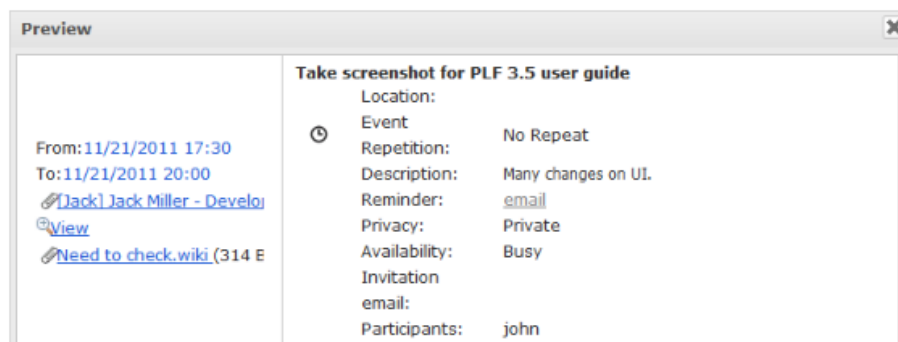


### The second way

Right-click the task in the **Calendar View** pane, then select **View** from the drop-down menu.



The **Preview** form will be displayed.



At the **Preview** form, if the task includes attachments, you can download them by directly clicking its title. If the attachment is an image, you can also click **View** to preview it.

### 4.1.8.1. Create a new task

You have 2 ways to add a new task:

- **Quick add:** allows you to create the most basic event details.
- **Detailed add:** allows you to create events with advanced details.

#### 4.1.8.1.1. Quick add a task

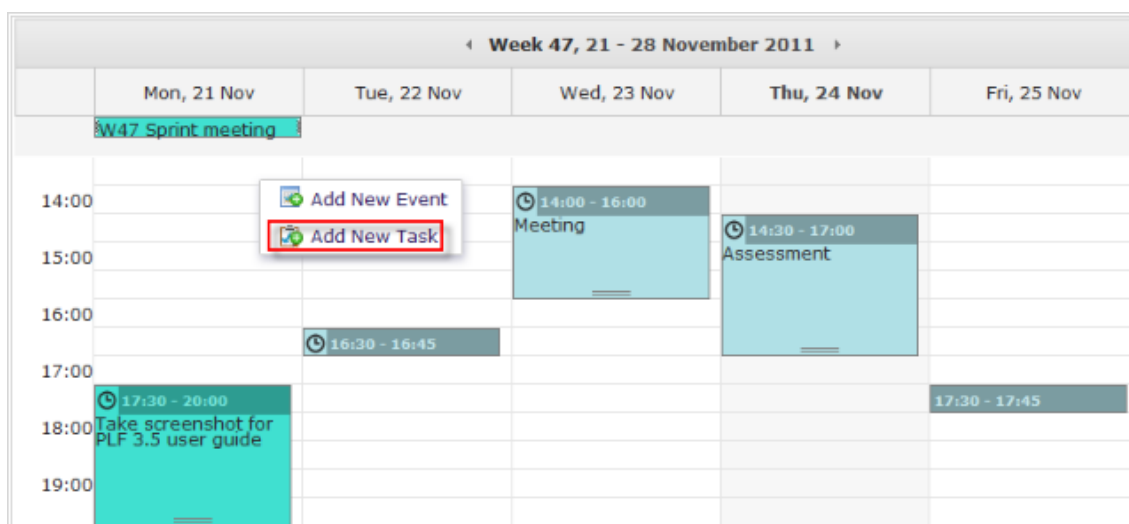
1. Open the **Quick Add Task** form via the following ways:

##### The first way


Select  on the **Toolbar**.

##### The second way

Right-click the **Calendar View** pane, then select **Add New Task** from the drop-down menu.



### The third way

- i. Hover your cursor over the calendar which you want add tasks, then click  that appears.
  - ii. Click **Add Task** from the drop-down menu.
2. Fill in fields of the **Quick Add Task** form.

### Details:

Field	Description
<b>Task</b>	The name of the task.
<b>Note</b>	The note of the task.
<b>From</b>	The starting date/time of the task.
<b>To</b>	The ending date/time of the task.
<b>All Day</b>	Tick the checkbox to set the task duration to be all day. If you do not check this option, you have to select the starting date/time and ending date/time. By default, the starting and ending dates are the current ones.
<b>Calendar</b>	The calendar which includes the task.
<b>Task Category</b>	The category which includes the task.



3. Click **Save** to finish creating your new task; or click **More Details** to open the [Add a detailed task](#) form.

### 4.1.8.1.2. Add a detailed task

1. Open the **Quick Add Task** form by following steps as stated in the [Quick add a task](#) section.
2. Click **More Details** in the **Quick Add Task** form to open the **Add/Edit Tasks** form.


3. Give details of your task in the fields of tabs.

i. In the **Detail** tab, you can:

- Follow the [Step 2](#) to provide basic information for your task.
- Also,
  - Select the user to whom you want to delegate the task in the **Task Delegations** tab. For more details, see the [Assign a task delegation \[185\]](#) section.
  - Select the priority level of the task from the **Priority** drop-down menu.
  - Select the category of the task from the **Task Category** drop-down menu. You can add a new category by clicking .
  - Select the status of the task from the **Task Status** drop-down menu: Need Action, In Process, Completed or Canceled.
  - Attach files to your task by clicking .

ii In the **Reminders** tab, you can create one notification to remind you of your task. For more details, see the [Create a reminder \[185\]](#) section.

#### Assign a task delegation

This function is done in the the **Detail** tab. To delegate a task to users, simply enter their names manually, or click  to select users from the **Select Users** form.

#### Create a reminder

The reminder function is used to remind users of their tasks. A reminder includes the summary information of the task, such as title, time, and place where the task will happen.

This function is done in the **Reminders** tab. To create a reminder for a task, see the [Create a reminder for upcoming events \[176\]](#) section for more details.

### 4.1.8.2. Edit task details

1. Right-click the task you want to edit, then select **Edit** from the drop-down menu.

The **Add/Edit Tasks** form will be displayed.

2. Modify the information of your selected task, then click **Save** to finish.



#### Note

For shared and group calendars, you can only edit their tasks if you have the **Edit** permission on these calendars.



#### Tip

When editing the task, you can add, remove or download attachments by directly clicking their titles.

If you only want to change the starting date and time of the task, you can also use drag-and-drop feature to edit the time for the task directly on the **Calendar View pane**.

### 4.1.8.3. Drag and drop a task

Like dragging and dropping an event, **drag-and-drop** is a feature to change the starting date and time of a task conveniently. You only need to click and hold your cursor over the task, drag and drop it to a new day and a new time area in Calendar View pane.

- To change a task duration (in the Day, Week and Work Week views only), point your cursor to the **Scroll** button at the bottom of the task and drag it.
- To change the date and time of a task, simply drag and drop the task to another area.

- In the **Day** view, all tasks are shown in 1 day, so you can change the task time in one day only.
- In the **Week** and **Work Week** views, all tasks are shown in 1 week, so you can change both the task time and date.
- In the **Month** view, all tasks are shown in 1 month, so you can change the task date only. You can also change the date for multiple tasks at the same time by ticking their checkboxes and using the drag-and-drop feature.

**Note**

For shared and group calendars, you can only drag and drop their tasks if you have the **Edit** permission on these calendars. If you drag and drop the task that you do not have the **Edit** permission, you will receive a warning message informing that you are not allowed to edit this task.

#### 4.1.8.4. Export/Import a task

**Note**

Exporting/Importing a task means exporting/importing a calendar with one task only. Therefore, the exported/imported file format and the way to export/import a task is similar to the way to export/import a calendar with multiple events and tasks.

##### Export a task

1. Right-click the task that you want to export, then select **Export** from the drop-down menu.

The **Export Calendars** form will appear.

Export Calendars

File Name: Travel Plan

Export Format: iCalendar (.ics)

Contacts Birthday: ☒

Save Cancel

2. Enter the file name and export format.
3. Click **Save** to accept exporting the task.
4. Click **OK** in the confirmation message to save the exported file into your local disk.


##### Import a task

This function allows importing a task from your local device into a specific calendar. For more details, see the [Import Calendar \[168\]](#) section.

#### 4.1.8.5. Delete a task

1. Right-click the task you want to delete, then click **Delete** from the drop-down menu.
2. Click **OK** in the confirmation message to accept your deletion.

##### Delete a task in the Month view

1. Tick the checkboxes corresponding to the task you want to delete, then click  **Delete** on the **Month** information bar.

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



#### Note

For shared or group calendars, you can only delete their tasks if you have the **Edit** permission on these calendars.

### 4.1.9. Search for events/tasks

This function allows finding existing events/tasks according to specific search conditions easily. There are 2 search types: **Quick search** and **Advanced search**.

#### Perform a quick search

This function allows you to do a quick search with specific keywords in all your events/tasks. All events/tasks having the text matching with your search term will be returned.


1. Enter a word in the **Search** field at the right corner of the toolbar.



2. Click  to perform your search.

#### Perform an advanced search

This function allows you to make a search with multiple criteria.

1. Click  next to the search box.
2. Define your search criteria in the **Advanced Search** form.

The Advanced Search dialog box contains the following fields and values:

- Text:** user guide
- Type:** Task
- Calendar:** EXO (exo)
- Category:** Meeting
- Task Status:** In Process
- Priority:** High
- From Date:** 07/01/2012
- To date:** 07/20/2012

Buttons: Search, Cancel

#### Details:

Field	Description
<b>Text</b>	The search term or keyword for searching.
<b>Type</b>	The type you want to search with 3 options. If you leave this field "blank", both events and tasks are retrieved. If you select <b>Task</b> , you will see one more field named <b>Task Status</b> right after <b>Category</b> .

Field	Description
<b>Calendar</b>	The calendar on which you want to perform your search.
<b>Category</b>	The category of event/task to conduct your search.
<b>Task Status</b>	The status of the task: Need Actions, Completed, In Process, Canceled.
<b>Priority</b>	The priority of your needed tasks/events: Normal, High or Low. If you leave <b>blank</b> in the field, your search will be done to all priority levels.
<b>From Date</b>	Only the events/tasks having 'To date' greater than or equal the date entered in the <b>From Date</b> field are listed in the results form. You can manually input or select the date from drop-down calendar.
<b>To Date</b>	Only the events/task having 'From date' less than or equal to the date entered in the <b>To date</b> field are listed in the results form. You can input the date manually or select the date from the mini calendar.

3. Click **Search** to perform your search. All events/tasks matching with your criteria will be listed in the results form.



#### Note

At the **Search Result** form, you can also view, edit or delete one event/task by right-clicking it and selecting one action from the drop-down menu.

## 4.1.10. More actions

In Calendar, you can perform other actions that will help you take advantage of all Calendar productivity features. You can keep track of all events with RSS, change the Calendar settings to your own preferences or use categories to manage tasks and events.

### 4.1.10.1. Generate RSS

This function allows you to publish your calendar as an RSS feed. It will build a URL that helps you keep track of all events via the RSS reader.

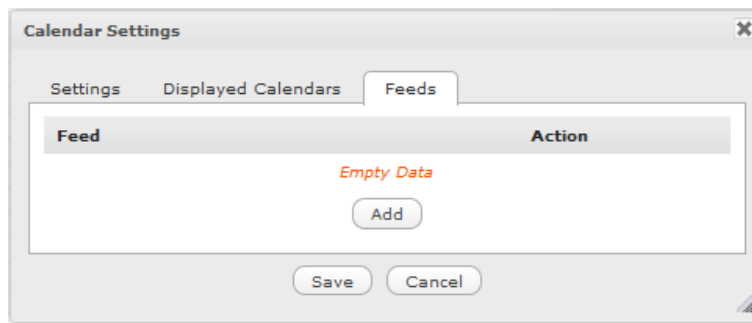
1. Open the **Feeds** tab by following either of the ways:

#### The first way

Click directly  on the toolbar.

#### The second way

Click  on the toolbar to open the **Calendar Settings** form, then select the **Feeds** tab.






2. Click **Add** to open the **Edit Feed** form.

**Details:**

Field	Description
<b>Name</b>	The name of the feed which is required.
<b>URL</b>	The link of the feed which is required.
<b>Calendars</b>	The calendars into which your created feed is applied.
<b>Add more</b>	Add the calendar that you want to get RSS feed.

3. Input the name of RSS in the **Name** field.

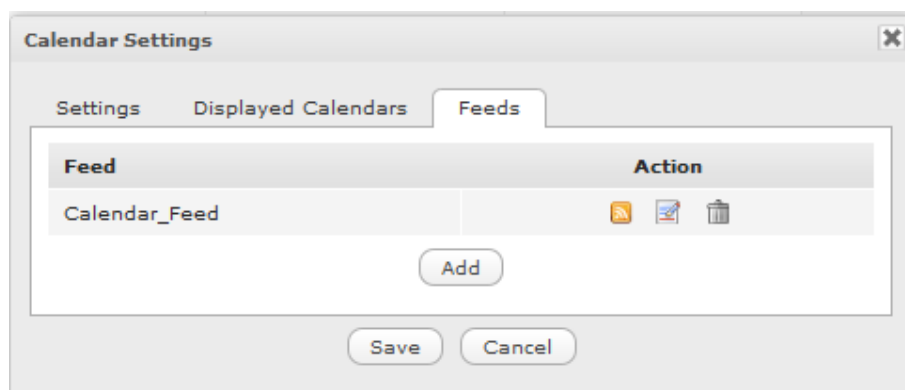
4. Click  to generate the RSS link. The URL will be automatically generated into the **URL** field. Click  to reset the RSS link.

5. Input the calendar name that you want to get the RSS feed in the **Add more** field, then click  to add your selected calendar.


- Click  corresponding to the calendar name to delete your added calendar.

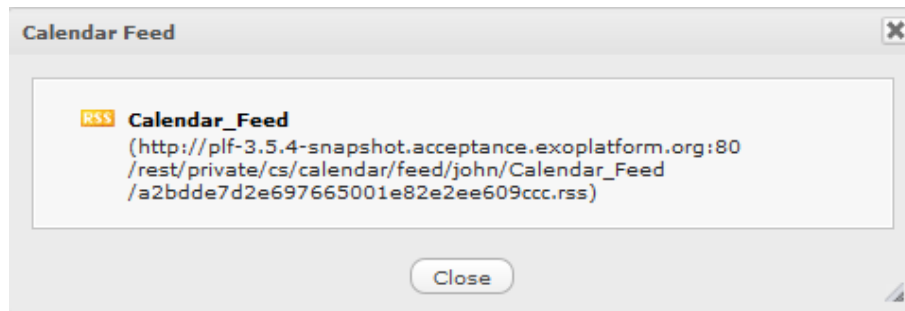
6. Click **Save** to accept generating the feed, then click **OK** in the notification message.

The created feed will be shown like the illustration below.





- Here, you can get the RSS link by clicking . Copy and paste this address link into another Calendar products which support RSS to directly view this calendar in that application.



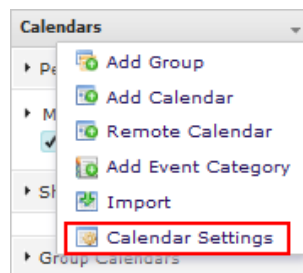
#### 4.1.10.2. Edit Calendar settings

In the **Calendar** application, you can change default values for its settings.

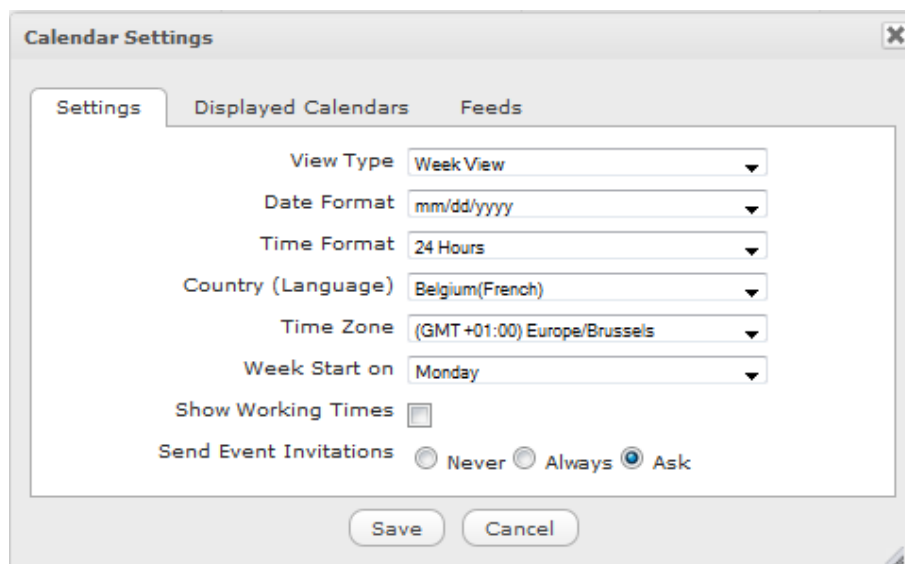
- Open the **Calendar Settings** form via either of the following ways:

**The first way:** Click  on the **Toolbar**.

**The second way:** Click , then select **Calendar Settings** from the drop-down menu.



- Make changes on your calendar settings.



- In the **Settings** tab, you can change values in the following fields:

Field	Description
View Type	

Field	Description
	The view type of Calendar View Pane. You can define the default view type when you start the <b>Calendar</b> application (Day, Week, Work Week, Month, Year, List).
<b>Date Format</b>	The date format which is displayed in Calendar, such as Starting date, Ending date of events/tasks.
<b>Time Format</b>	The time format which is displayed in Calendar, such as the time of Starting date, or Ending Date and the time displayed in Calendar View Pane.
<b>Country (Language)</b>	The default geographical location displayed in Calendar.
<b>Time Zone</b>	The default time zone displayed in Calendar.
<b>Week Start On</b>	The first day of the week displayed in the <b>Week</b> and <b>Work Week</b> views.
<b>Show Working Times</b>	Click the checkbox to display the working times when viewing the calendar. The working time can be defined by selecting Starting and Ending time.
<b>Send Event Invitations</b>	<p>Tick one checkbox to set the default value for sending an email event invitation when you create an event. There are 3 options:</p> <p>Never: The event invitation will not be sent to any participants.</p> <p>Always: The event invitation will automatically be sent to the participants.</p> <p>Asked: There will be a confirmation message to ask whether you want to send the invitation or not.</p>


ii. In the **Displayed Calendars** tab, you can define which calendars to be displayed in the **Calendar** application by simply ticking checkboxes.

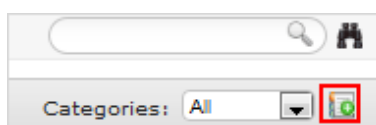
iii. In the **Feeds** tab, you can generate an RSS feed as stated in the [Generate RSS](#) section.

### 4.1.10.3. Manage categories

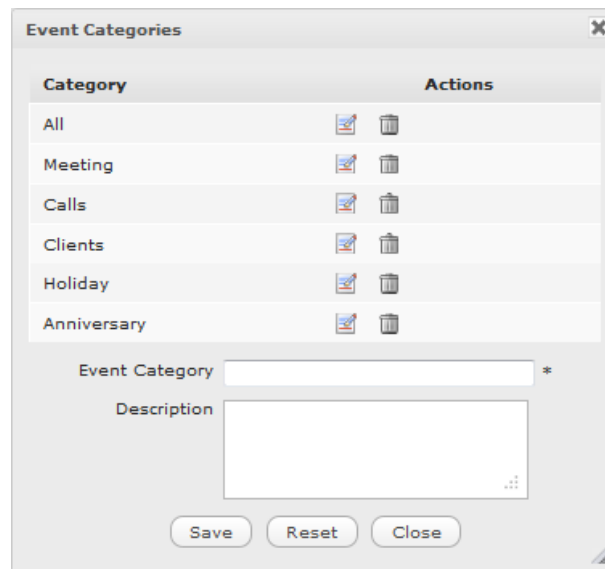
Categories are used to classify events and tasks. For example, you could use a 'Meeting' category for all meetings with your colleagues or customers in your company. By default, Calendar provides 5 available categories: Calls, Meeting, Holiday, Clients, Anniversary. You can add and view events/tasks in default categories. In addition, you also can edit, delete default categories or create new categories by yourself.

#### 4.1.10.3.1. Add a new category

1. Click  at the right corner of the **Toolbar**.



The **Event Categories** form will appear.



The 'Event Categories' dialog box contains a table with the following data:

Category	Actions
All	[Edit] [Delete]
Meeting	[Edit] [Delete]
Calls	[Edit] [Delete]
Clients	[Edit] [Delete]
Holiday	[Edit] [Delete]
Anniversary	[Edit] [Delete]




Below the table, there are two input fields: 'Event Category' (with a dropdown arrow) and 'Description' (a text area). At the bottom are three buttons: 'Save', 'Reset', and 'Close'.

2. Enter the category name and its description in the **Event Category** and **Description** fields respectively, then click **Save** to finish.

Your newly created category then appears in the Categories table.

#### 4.1.10.3.2. Edit/Delete a category

This function allows you to change name and description of a selected category.

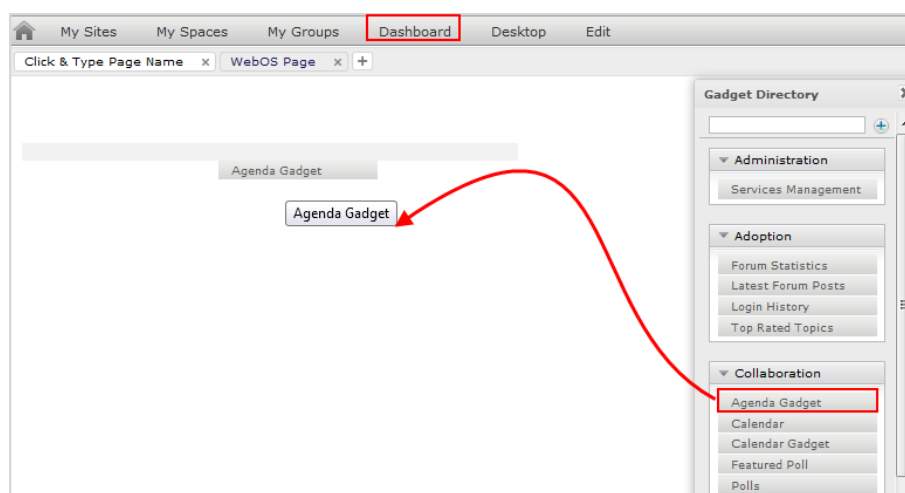
1. Click  on the information bar to open the [Event Categories form](#).
2. Click  or  corresponding to the category which you want to edit or delete respectively in the Categories table.
3. Click **Save** to finish editing/deleting your selected category.

### 4.1.11. Add My Agenda gadget to your page

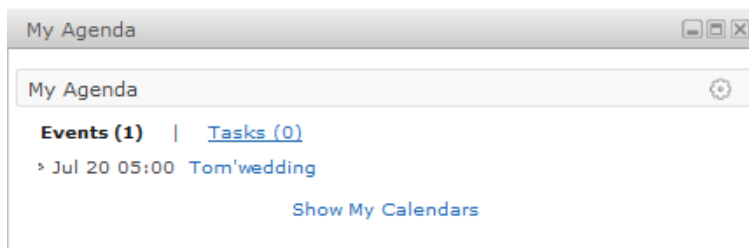
The **My Agenda** gadget is a utility associated with the **Calendar** application. This gadget is used for listing upcoming events and tasks from your personal calendar.

#### Add My Agenda gadget to your Dashboard

1. Click the **Add Gadgets** link on your Dashboard to open the **Gadget Directory**.
2. Drag and drop the **My Agenda** gadget to you Dashboard. You can rearrange this gadget to get different layouts.

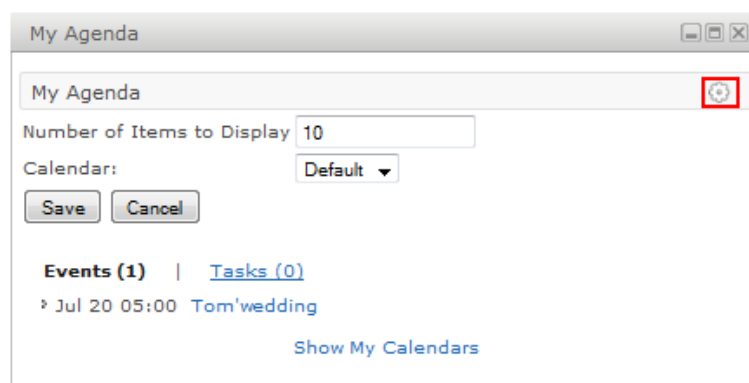


You will see the **My Agenda** gadget in the Dashboard as below:



### Configure the My Agenda gadget

1. Click  to open the **Agenda** gadget settings.



Field	Description
Number of Items to Display	The maximum number of the events and tasks which will be shown.
Calendar	Name of your personal calendar.

2. Select your desired preferences.
3. Click **Save** to accept your changes.



#### Tip

By clicking the **Show My Calendars** link, you will go to the Portal page that contains the **Calendar** application.

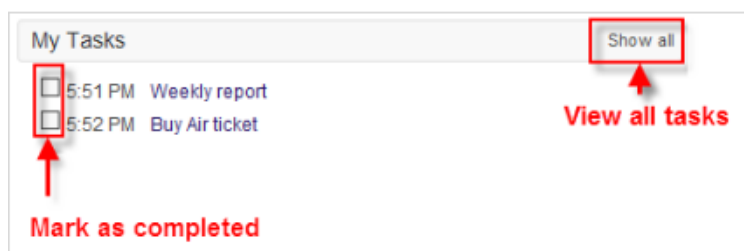
### 4.1.12. Add My Tasks gadget to your page

The **My Tasks** gadget is a utility associated with the **Calendar** application. This gadget is used for listing upcoming tasks of the current day from your personal calendar.

#### Add My Tasks gadget to your Dashboard

The procedure is similar to [adding Agenda gadget to your Dashboard](#)

You will see the **My Tasks** gadget in the Dashboard as below:



## 4.2. Manage your contacts

- [View contacts](#)

Introduction to the view modes in **Address Book**.

- [Create a new contact](#)

Ways to create and add the new contact to **Address Book**.

- [Edit contact details](#)

Steps to update the contact's information.

- [Tag a contact](#)

Ways and steps to use the tag to categorize contacts, including adding/editing/deleting a tag.

- [Send a mail to a contact](#)

Steps to compose and send mails to contacts in **Address Book**.

- [Copy/Paste a contact](#)

Ways and steps to copy/paste contacts.

- [Move a contact](#)

Ways and steps to move contacts between personal address books.

- [Delete a contact](#)

Ways and steps to remove contacts from address books.

- [Export contacts](#)

Step-by-step instructions on how to export one or more contacts into a file to be used in another address book applications.

- [Import contacts](#)

Step-by-step instructions on how to import one or more contacts from your device to a selected address book.

- [Print contacts](#)

The ways to print information of one or more selected contacts.

- [Print an Address Book](#)

Steps to print the summary information of contacts of an address book in the form of name cards.

- [Share contacts](#)

Steps to share contacts with other users or groups. The shared users/groups may have **View or Edit permissions** on the shared contacts.

- [Search for contacts](#)

Steps to use **Quick Search** and **Advanced Search** to find contacts.

- [Manage Address Books](#)

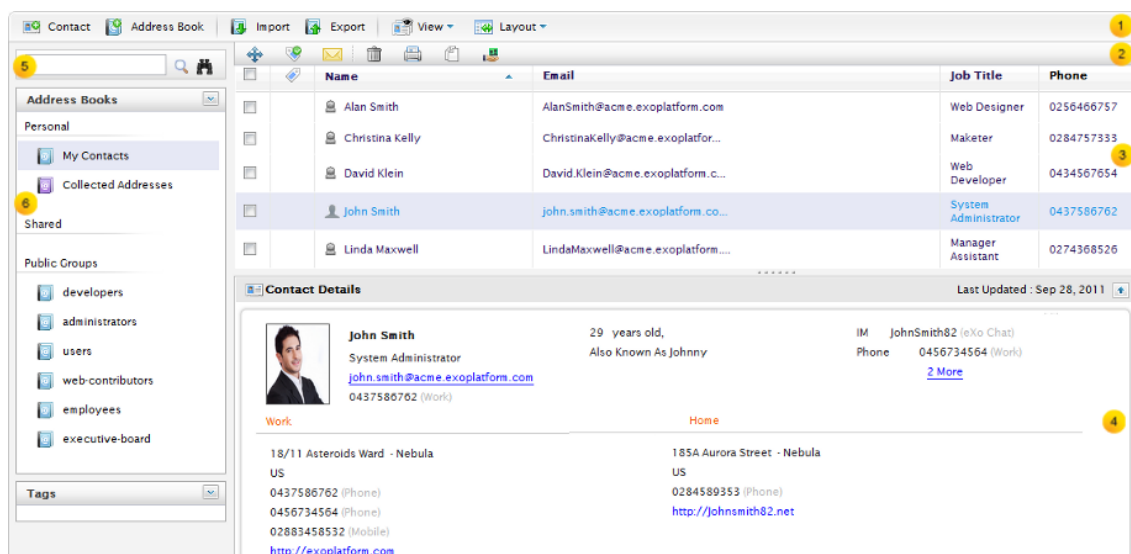
Steps to perform common actions for the **Address Book** management: creating, editing, removing, exporting/importing, sharing address books and granting permission.




### Note

The **Address Book** portlet and its services are deprecated. It remains fully supported for eXo customers, however it will not receive any enhancement and will be removed from the product scope in the future.

Before starting to use **Address Book**, you should familiarize yourself with the **Address Book** interface, which has six basic elements.



Number	Details
1	The <b>Toolbar</b> allows you to add a new contact/address book, import/export an address book, view and customize the layout.
2	The <b>Action bar</b> allows quick access to actions on contacts, such as moving, deleting, copying, printing, adding tags to selected contacts.
3	The <b>Contacts list</b> shows all contacts in a specific address book.
4	The <b>Contact view pane</b> displays details of the selected contact.
5	The <b>Search pane</b> which allows you to do the quick and advanced searches to find contacts.
6	The <b>Navigation pane</b> contains search pane, address books list and tags list.

The layout can also be customized. You can hide or show specific parts of the **Address Book** interface. To change the layout, click  **Layout** on the main toolbar, then select the layout you want to hide or display from the drop-down menu.

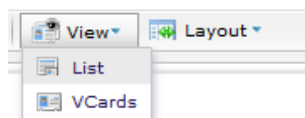
### See also

- [Manage your calendar](#)
- [Email your contacts](#)

- Chat with your contacts


### 4.2.1. View contacts

At present, your contacts can be viewed in 2 modes: **List** or **VCards**.



#### List view:

The list view displays all contacts in the list pane and detailed information of the selected contact in the Contact view pane.

On the toolbar, click , then select **List** from the drop-down menu.

The contacts are displayed in a list as below.

	Name	Email	Job Title	Phone
	Fernando Felipe	Fernando@exoplatform.com	Human Resource Manager	—
	James David	—	—	—
	John Smith	john.smith@acme.exoplatform.co...	—	—
<input checked="" type="checkbox"/>	Marry Williams	Williams@gmail.com	Content Manager	—

**Marry Williams**  
Content Manager  
[Williams@gmail.com](mailto:Williams@gmail.com)

Work

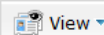
Note

Male  
Also Known As Marry

Home

Last Updated : Nov 24, 2011

#### VCards view:

VCard is a file format standard for electronic business cards. It is a powerful new means of Personal Data Interchange that is automating the traditional business card. On the **Toolbar**, click , then select **VCards** from the drop-down menu.

The contacts are displayed in separate cards as below:

**Fernando Felipe**  
Human Resource Manager  
Email 1 : [Fernando@exoplatform.com](mailto:Fernando@exoplatform.com)  
[View Details](#)

**James David**  
[View Details](#)

**John Smith**  
Email 1 : [john.smith@acme.exoplatform.co...](mailto:john.smith@acme.exoplatform.co...)  
[View Details](#)

**Marry Williams**  
Content Manager  
Email 1 : [Williams@gmail.com](mailto:Williams@gmail.com)  
[View Details](#)

### 4.2.2. Create a new contact

1. Open the **Add/Edit Contact** form by following either of two ways:

#### The first way

Click  on the **Toolbar**.

**The second way**

Right-click an address book in the **Address Books** pane, then select **Add** from the drop-down menu.

**Tip**

You can also add a new contact from the **Mail** application as covered in the [Add a new contact \[243\]](#) section.

2. Input information into fields of each tab in the **Add/Edit Contact** form.

**Details:****i. The Profile tab**



Field	Description
<b>Asterisk (*)</b>	This mark next to each field means that it is required to enter values in the field.
<b>First Name</b>	The first name of your contact which must be between 1 and 40 characters.
<b>Last Name</b>	The last name of your contact. Its length must be between 1 and 40 characters.
<b>Nick Name</b>	The nick name of your contact with any unlimited length.
<b>Gender</b>	Gender of your contact. Simply tick the two available checkboxes: Male or Female.
<b>Birthday</b>	Birthday of your contact. Click the relevant down arrows to select the day, month and year from the drop-down menu.
<b>Job Title</b>	The job title of your contact. Its length must be between 0 and 40 characters.
<b>Email</b>	The email address of your contact.

**Change contact's avatar**



- Click **Update** below the avatar to upload photos from your device.
- Remove your uploaded image by simply clicking **Delete** below the avatar.

#### Add contact's email address


- Enter the email address into the **Email** field. If you want to add more email addresses, simply click  to show another **Email** field.
- Remove your email address by clicking .

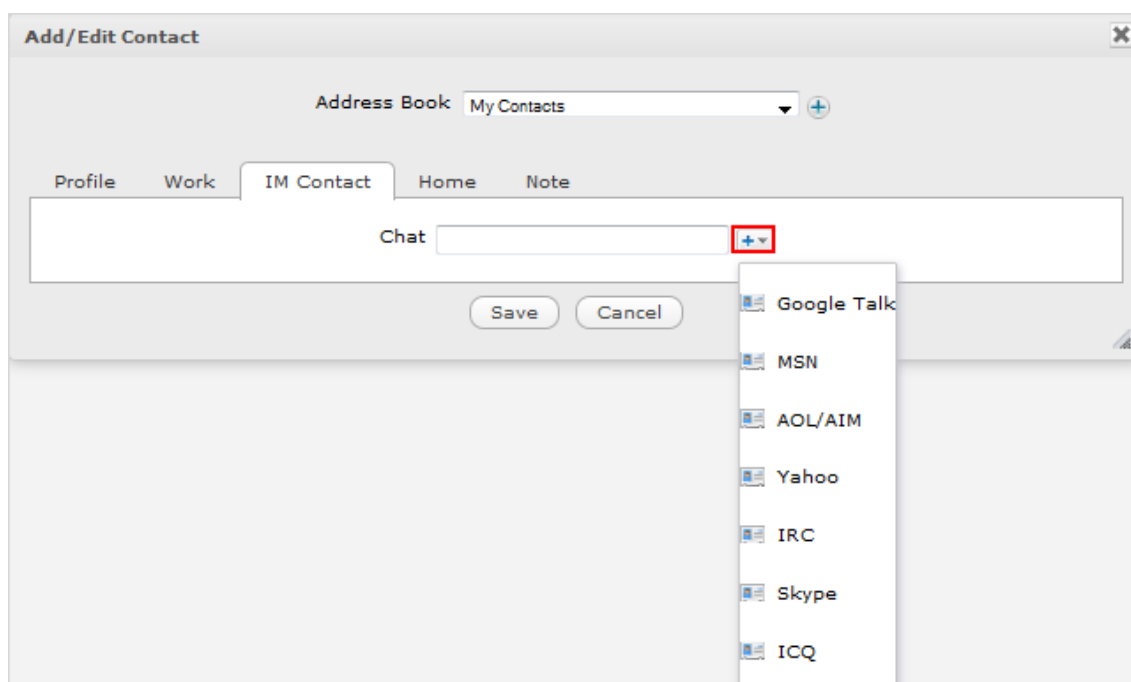
#### Add contact's instant message information

- The **Work** tab

All fields in this tab are optional. In this tab, you can provide the contact's job-related information without any limitations of character types or length.

- The **IM Contact**

In this tab, you can enter information about the contact chat identity (IM stands for Instant Message). The default text messaging service is the **Chat** application of eXo Platform, but you can select other services by clicking  to open the drop-down menu.



The screenshot shows the 'Add/Edit Contact' window with the 'IM Contact' tab active. The 'Chat' field is highlighted with a red box around the plus icon, and a dropdown menu is open showing various instant messaging services: Google Talk, MSN, AOL/AIM, Yahoo, IRC, Skype, and ICQ. The 'Save' and 'Cancel' buttons are visible below the field.

- The **Work**, **Home** and **Note** tabs

In these tabs, you can further provide many information related to the contact's work, home and note.

3. Click **Save** to accept adding a new contact.

### 4.2.3. Edit contact details

This function allows you to update information of contacts whenever you like.

1. Right-click your desired contact in the list, then select **Edit** from the drop-down menu. The **Add/Edit Contact** form will appear with the selected contact's current information that is similar when [creating a new contact](#).
2. Make your desired changes on fields, then click **Save** to accept.

**Note**

You can only edit a contact of your personal and shared address books (if you have the **Edit** permission).

**Tip**


You can also edit contact details in Mail. For more information, see the [Edit contact details \[244\]](#) section.

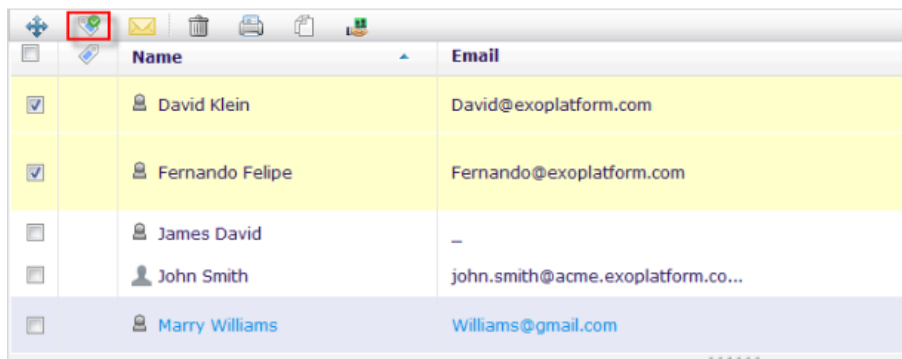
## 4.2.4. Tag a contact

### The first way

Right-click the relevant contact, and select **Tag** from the drop-down menu.

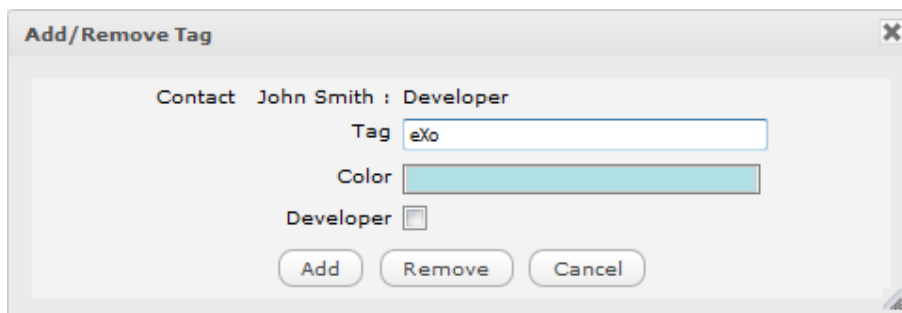
### The second way

Select the contacts by ticking their respective checkboxes, then click  on the **Action** bar.



### The third way

Drag and drop contacts to a specific tag in the **Tags** list in the left pane to open the **Add/Remove Tag** form.



In this form, you can add a new tag, remove or reassign a tag to a contact.

**Tip**

To add a new tag quickly, click **Add** in the **Tag** pane.



### Edit a tag

1. Right-click a tag in the tag area, then select **Edit** from the drop-down menu.
2. Make changes in the **Edit Tag** form, then click **Save** to accept your changes.

#### Delete a tag

1. Right-click a tag you want to delete, then click **Delete** from the drop-down menu.
2. Click **OK** in the confirmation to accept your deletion.

### 4.2.5. Send a mail to a contact



#### Note

This function allows you to send a mail directly to one or more contacts in your address book. To take this action, you first need to:

Have at least one account in **Mail**.

Have the email address of the contact which you want to send mail.

Email address of the selected account will be used to send mail to a contact.

#### Send a mail to a contact

1. Open the **Email** function by following either of 3 ways:

##### The first way

Right-click the contact to whom you want to send mail, then select **Email** from the drop-down menu.

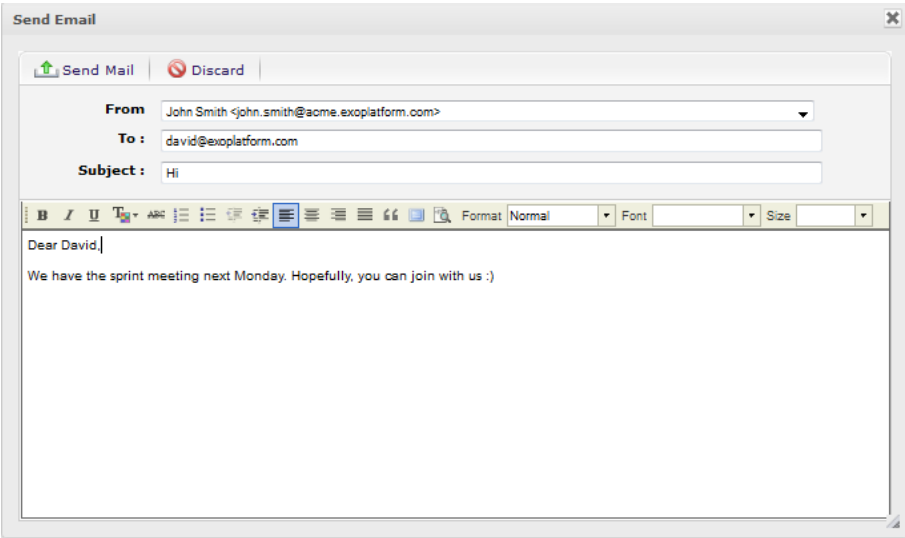
##### The second way

Select the contacts that you want to send mail by ticking their respective checkboxes, then click  on the **Action** bar.

##### The third way

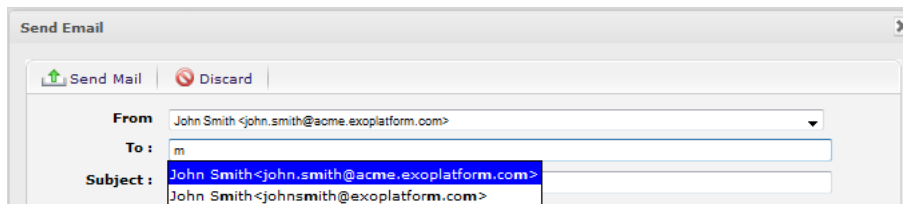
Right-click the address book and select **Email** from the drop-down menu. By this way, you will send mail to all contacts in that address book.

The **Send Email** form will appear.



2. Input the recipients' email addresses in the **To** field if needed.

You just need to enter one character included in your desired email address. There will be a list of addresses matching your entered character for you to select quickly.



3. Enter the subject and content of your message in the **Subject** field and mail body respectively.


4. Click the **Send Mail** button.

### 4.2.6. Copy/Paste a contact

This function allows you to make the copies of contacts from an address book and to store in another ones.

#### Copy a contact

##### The first way

1. Select contacts by ticking their respective checkboxes.
2. Click  on the **Action** bar.

##### The second way



#### Note

This way is to copy all contacts of an address book.

1. Right-click one address book.
2. Select **Copy** from the drop-down menu.

#### Paste a contact



#### Note

The **Paste** action is only activated after your desired contacts have been copied.

1. Right-click one destination address book to which you want to move your copied contacts.
2. Click **Paste** to accept moving your contacts.


### 4.2.7. Move a contact

It is simple to move one or more contacts from one address book to another.

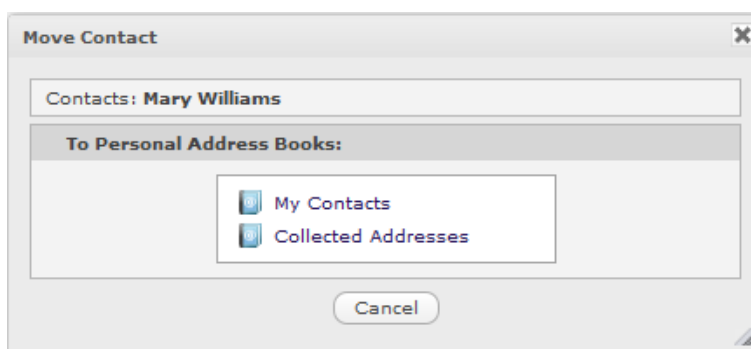
##### The first way

Right-click a contact and select **Move** from the drop-down menu.

##### The second way

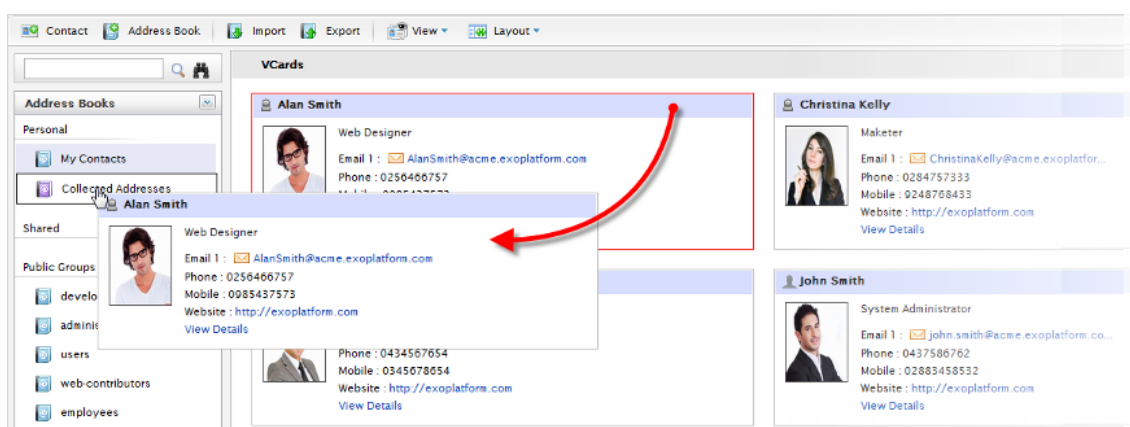
Select contacts you want to move, then click  on the **Action** bar.

The **Move Contact** form will appear, allowing you to select a destination address book where your moved contacts are stored.



### The third way

Use the drag-and-drop function to move one or more contacts to a new address book.



The drag-and-drop function is done more easily in the VCards view.



#### Note

You can only move contacts of a personal or shared address book if you have the **Edit** permission. You cannot move contacts in the address book which you do not have the **Edit** permission or contacts in a public address book.

## 4.2.8. Delete a contact

### The first way


1. Right-click a contact you want to remove, then select **Delete** from the drop-down menu.
2. Click **OK** in the confirmation message to accept your deletion.

### The second way



#### Note

This way allows you to delete multiple contacts.

1. Tick checkboxes corresponding to contacts you want to delete, then click  on the **Action** bar.
2. Click **OK** in the confirmation message to accept your deletion.

## 4.2.9. Export contacts

This feature allows you to export one or more contacts into a file to be used in another address book applications. These exported contacts will have the same information in all address books you use. You can export a single contact or multiple contacts flexibly.

1. Right-click one contact, or address book if you want to export all contacts of the address book, then select **Export** from the drop-down menu.

The **Export Address Books** form will appear.

2. Select contacts to export by ticking their respective checkboxes.
  3. Enter the file name and select the export format. At present, only **x-vcard** is supported.
  4. Click **Export All** to export all contacts in all pages;
- Or, click **Export Selected Only** to export your selected contacts only.

## 4.2.10. Import contacts

This function allows you to import one or more contacts from your device to a selected address book.

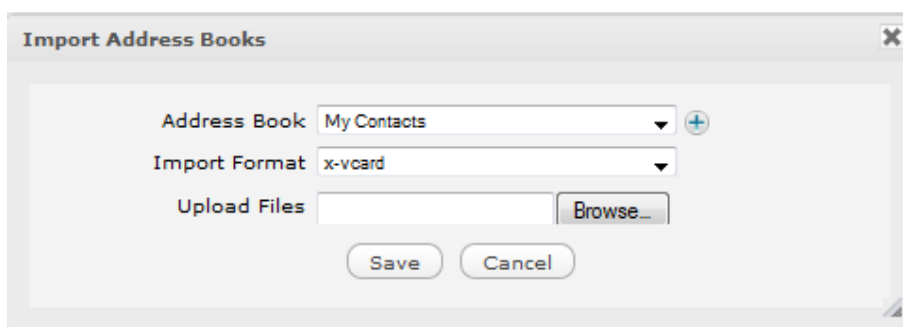
1. Open the **Import Contacts** form via either of the following ways:


### The first way


Click  on the toolbar.

### The second way

Right-click a personal or shared address book which you have the **Edit** permission, then click **Import** from the drop-down menu. By this way, you can quickly select the destination address book for the imported contacts.



2. Click  in the **Address Book** field, then select your desired address book into which you want to import your contacts from the drop-down menu;

Or, click  to quickly create a new address book.

3. Select the file format in the **Import Format** field. At present, only **x-vcard** is supported.

4. Click **Browse...** to open the **File Upload** form.

5. Select the file you want to import from your device, then click **Open** to upload your selected file.

6. Click **Save** to finish your import.

## 4.2.11. Print contacts

The **Print** function allows you to print information of your selected contacts. You can print one or more contacts at the same time.

### Print one contact

1. Right-click the contact you want to print, then select **Print** from the drop-down menu.

The single Contact Print Preview will appear with the detailed information:

	<b>Linda Maxwell</b> Manager Assistant LindaMaxwell@acme.exoplatform.com 0274368526 (Work)	25 years old, Male  IM Linda.maxwell (eXo Chat) Phone 0345345587 (Work) 0938458734 (Work)
<div> <div>Work</div> <div>18/11 Asteroids Street - Nebula Aurora - US 0274368526 (Phone) 0345345587 (Phone) 0938458734 (Mobile) http://exoplatform.com</div> </div> <div> <div>Home</div> <div>http://LindaMaxwell.blog.com</div> </div>		
<div>Note</div>		
<div>Print Cancel</div>		


2. Click **Print** to print.

**Note**

When you are in the **VCards** view, the print process is a quite different. You first need to click **View Details** to display the contact's details. After that, click **Print Preview** to open the Preview page, then select the **Print** button.


**Print multiple contacts**


1. Select contacts you want to print by ticking their respective checkboxes, then click  on the **Action** bar.


		Name	Email
<input checked="" type="checkbox"/>		Alan Smith	AlanSmith@acme.exoplatform.com
<input checked="" type="checkbox"/>		Christina Kelly	ChristinaKelly@acme.exoplatform...
<input checked="" type="checkbox"/>		Fernando Felipe	FernandoFelipe@acme.exoplatform...
<input type="checkbox"/>		John Smith	john.smith@acme.exoplatform.co...


The **Print Preview** page will appear with their summary information.


VCards




**Alan Smith**  
Web Designer  
Email 1 :  AlanSmith@acme.exoplatform.com  
Phone : 0256466757  
Mobile : 0985437573  
Website : http://exoplatform.com



**Christina Kelly**  
Marketer  
Email 1 :  ChristinaKelly@acme.exoplatform.com  
Phone : 0284757333  
Mobile : 9248768433  
Website : http://exoplatform.com



**Fernando Felipe**  
Web Developer  
Email 1 :  FernandoFelipe@acme.exoplatform.com  
Phone : 0434567654  
Mobile : 0345678654  
Website : http://exoplatform.com

2. Click **Print** to print information of your selected contacts.

## 4.2.12. Print an Address Book

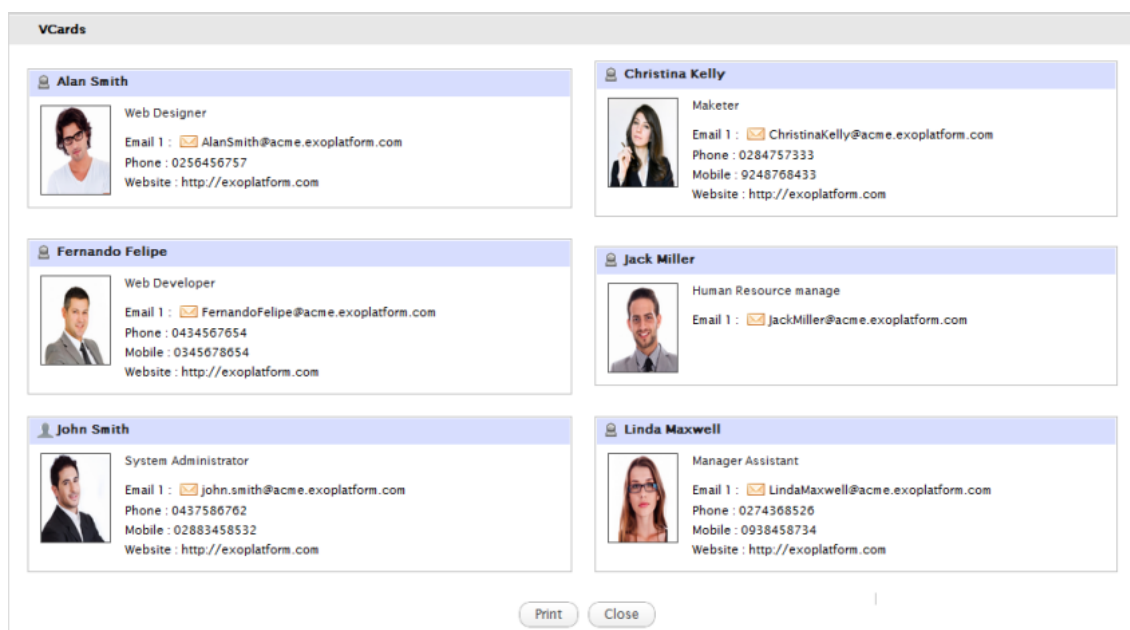
This function allows you to print the summary information of contacts in form of name cards. You can also print all contacts in an address book at the same time.

**Print an address book**

1. Right-click the address book which you want to print, and select **Print** from the drop-down menu.

The **Print Preview** page will appear.





2. Click **Print** to start printing.

### 4.2.13. Share contacts

This function allows you to share contacts with other users or groups. The shared users/groups may have **View** or **Edit** permissions on the shared contacts.

- The **View** permission allows users to view, copy, export, print, delete but cannot move your shared contacts. The shared users cannot make changes on the information of the shared contacts or move your shared contacts if they only have the **View** permission.
- The **Edit** permission allows users to view, copy, export, print, move, delete and edit the shared contacts. If you have the **Edit** permission on the shared contacts, you can share them with another users.

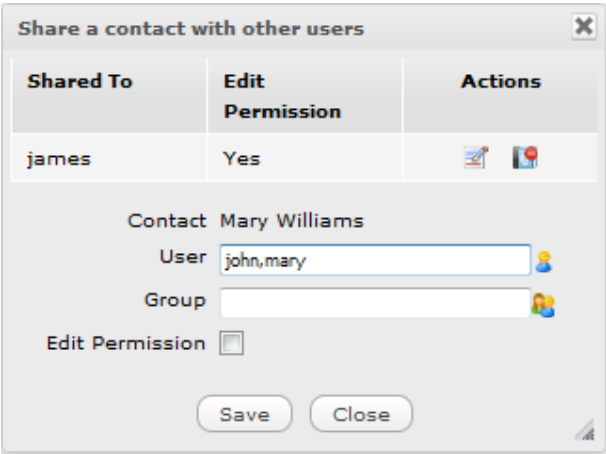


#### Note



The shared users can move or delete the shared contact only from their address books. It means that the shared contact still exists in the **Shared** address book of another shared users and of the creator/author. The shared contact will be permanently deleted in the **Shared** address books of the shared users or cannot be shared with other users if it is removed by the creator/author.

#### Share contacts with other users


1. Right-click the contact you want to share, then select **Share** from the drop-down menu;  
Or, drag and drop this contact to the **Shared** address book in the **Address Books** pane.  
The **Share a contact with other users** form will appear.




Share a contact with other users

Shared To	Edit Permission	Actions
james	Yes	 

Contact: Mary Williams

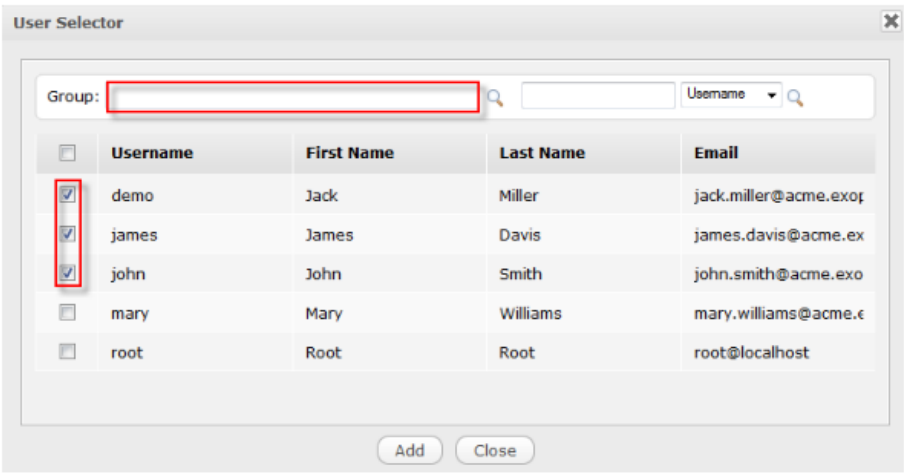
User:  

Group:  



Edit Permission: ☐

2. Select users or groups that you want to share.

i. Click  to open the **User Selector** form;



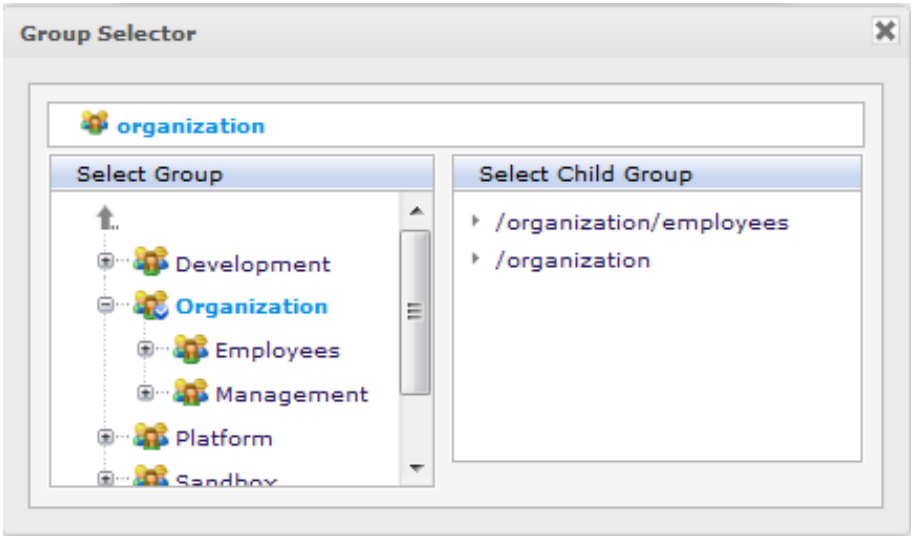
User Selector

Group:   Username  


<input type="checkbox"/>	Username	First Name	Last Name	Email
<input checked="" type="checkbox"/>	demo	Jack	Miller	jack.miller@acme.exo
<input checked="" type="checkbox"/>	james	James	Davis	james.davis@acme.ex
<input checked="" type="checkbox"/>	john	John	Smith	john.smith@acme.exo
<input type="checkbox"/>	mary	Mary	Williams	mary.williams@acme.e
<input type="checkbox"/>	root	Root	Root	root@localhost

In this form, tick the checkboxes corresponding to your desired users, then click **Add**. Also, you can use the **Search** function to look for your desired users quickly.







ii. Or, click  to open the **Group Selector** form.



Group Selector

 organization

Select Group

- ↑
-  Development
-  Organization
-  Employees
-  Management
-  Platform
-  Sandbox



Select Child Group

- ▶ /organization/employees
- ▶ /organization

In this form, select the group in the left pane, and its child group in the right pane.

3. Tick the **Edit Permission** checkbox if you want to grant the edit permission to your selected users or groups.

The shared users/groups will be updated in the Shared Users/Groups table of the [Share a contact with other users](#) form.

- Click  if you want to change the **Edit** permission of specific users/groups. Click  to remove the shared users/groups.

4. Click **Save** to accept your sharing.


## 4.2.14. Search for contacts

This function allows you to find contacts easily and quickly via 2 types:

- [Quick search \[209\]](#)
- [Advanced search \[209\]](#)

### Do a quick search


This function allows you to do a quick search with specific keywords in all your contacts. All contacts having the text matching your search term will be displayed in the **Search Result** dialog.

1. Enter your search term in the **Search** textbox in the left pane.
2. Click  to perform your search.

Your search results will be displayed in the right **Search Result** pane.

### Do an advanced search

With this mode, you can refine your search by using a variety of criteria. Your search results will be limited as follows:

1. Click  next to the search box to open the **Advanced Search** form.
2. Define your search criteria. You can set the search criteria by: Text, Full Name, First Name, Last Name, Nick Name, Job Title, Email and Gender.
3. Click **Search** to perform your search. All contacts matching your criteria will be shown in the **Search Result** dialog.

## 4.2.15. Manage Address Books

By default, there are 3 Address Book categories:

- **Personal** contains contacts/address books which are created by yourself. Each group may contain more than one contact.
- **My Contacts** is the default group which contains your own default contact generated from your registration information.
- **Collected Addresses** contains all contacts with information updated automatically when you send any message to a new email address from the Mail, Address Book and Calendar applications. That is, when you send an email to a new address, this address will be automatically added to **Collected Addresses**.
- **Shared** contains contacts/address books which have been shared with you by another users. You can view and update the shared contacts if you are granted the **Edit** permission.
- **Public Groups** contains address books of groups to which you belong. Each group contains all default contacts of group members that can be viewed only.


### Create an address book

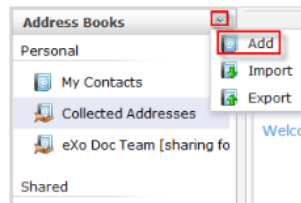
1. Open the **Add/Edit Address Book** form via one of the following ways.

### The first way

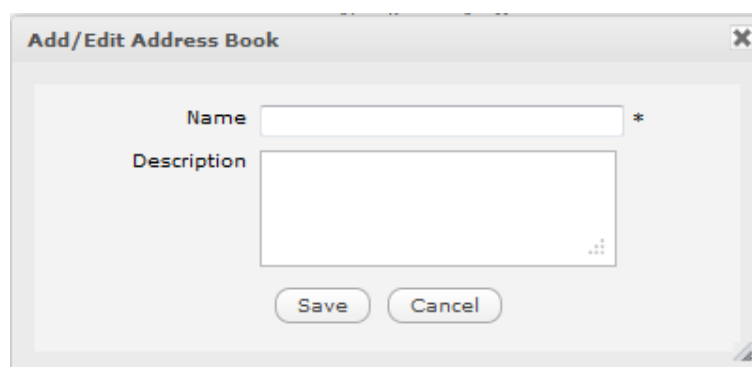
Click  **Address Book** on the **Toolbar**.

### The second way

Click  in the **Address Book** pane, and select **Add** from the drop-down menu.



2. Type name and description for your new address book in the **Name** and **Description** fields respectively in the **Add/Edit Address Book** form.

A screenshot of the 'Add/Edit Address Book' dialog box. It has a title bar with the text 'Add/Edit Address Book' and a close button. Inside the dialog, there are two text input fields: 'Name' and 'Description'. The 'Name' field has a red asterisk next to it, indicating it is required. Below the input fields are two buttons: 'Save' and 'Cancel'.

3. Click **Save** to accept adding your address book.



#### Tip

You can also create a new address book from **Mail**. For more information, see the [Add a new address book \[243\]](#) section in **Mail**.

### Edit an address book

1. Right-click an existing address book, and select **Edit** from the drop-down menu.
2. Make changes on information of your address book in the [Add/Edit Address Book form](#).
3. Click **Save** to accept your changes.



#### Note

You can only edit a Personal or Shared address book that you have the **Edit** permission. You cannot edit a Group address book.

### Remove an address book

1. Right-click an existing address book, then select **Delete** from the drop-down menu.
2. Click **OK** in the confirmation message to accept your deletion.


**Note**

You cannot delete your default and group address books.

**Export an address book**

1. Open the **Export Address Books** form via one of the following ways.

**The first way**

Click  **Export** in the **Toolbar**.

**The second way**

Click  in the **Address Books** pane, and select **Export** from the drop-down menu.

The **Export Address Books** form will appear with a list of all existing address books.

2. Tick checkboxes corresponding to address books that you want to export. If you want to select all the address books, tick the checkbox next to **Name**.

3. Enter the file name in the **Name** field, and select the export format from the **Export Format** form. At present, only **x-vcard** is supported.

4. Click **Export All** to start exporting all the address books or click **Export Selected Only** to export your selected ones only.

**Import an address book**

Once you have exported your address books, you can retrieve them easily at any time. Others can also import your address book to store in their address book. The process to import address books is simple as exporting address books.

1. Open the **Import Address Books** form via one of the following ways.

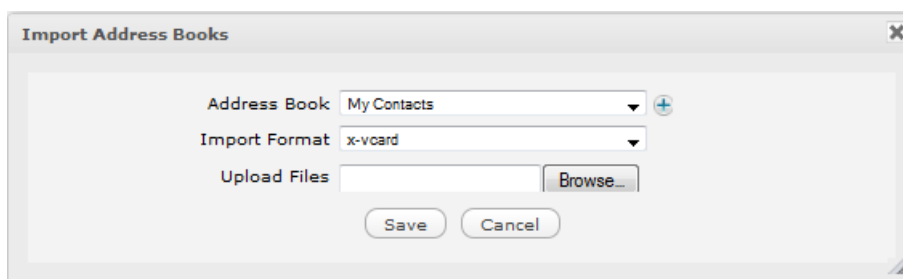
**The first way**

Click the **Import** button in the **Toolbar**.

**The second way**

Click  in the **Address Books** pane, then select **Import** from the drop-down menu.

The **Import Address Books** form will be displayed.



2. Select the address book which stores your imported address book contact from the **Address Book** drop-down menu;

Or, click  to [create a new address book \[209\]](#).

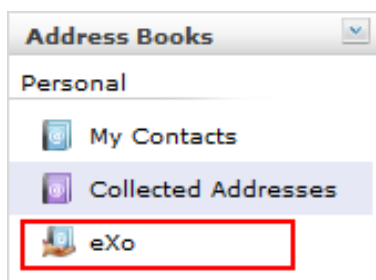
3. Select the import format. At present, only **x-card** is supported.

4. Click **Browse...** to open the **File Upload** form.

5. Select the address book file to import from your device, then click **Open** to upload your selected file.
6. Click **Save** to finish. You will see a notification of your successful import on the top right corner.

### Share a personal address book

This feature allows you to share personal address books with specific users or groups. The shared users/groups can view, export, add, edit or delete a shared address book (if they have the **Edit** permission). The shared address book is distinguished from other address books by a hand symbol.



1. Right-click the address book you want to share, and select **Share** from the drop-down menu.

The **Share an Address Book with other users** form will appear.

Shared To	Edit Permission	Actions
demo	No	
james	No	

Address Book: eXo

User:

Group:

Edit Permission: ☐

2. Select users or groups that you want to share. For more details, see [here](#).
  - The shared users/groups will be updated in the Shared Users/Groups table of the [Share an Address Book with other users](#) form.
  - Click to change the **Edit** permission or to remove specific users/groups from the Share Users/Groups table.
3. Tick the **Edit Permission** checkbox if you want to grant the **Edit** permission to your selected users/groups.
4. Click **Save** to finish.

### Grant permissions on a public address book

You can grant the **Read/Manage** permission on your managed public address books to specific users, groups or memberships.

- A user with the **Read** permission can see the address book.
- A user with the **Manage** permission can view/edit/rename and manage permissions on the address book.

By default, any member of a group has the **Read** permission and the group manager has the **Manage** permission.

### Grant a permission on a public address book

1. Right-click your managed public address book, and select **Permission** from the drop-down menu.

The **Permissions** form appears.

The screenshot shows a 'Permissions' dialog box with a table and form fields. The table lists permissions for two address books: '/platform/administrators' (Can manage? No) and '/platform/administrators:\*.manager' (Can manage? Yes). Below the table, there are fields for 'Address book: administrators', 'User' (with a user icon), 'Group' (with a group icon), and a 'Can manage?' checkbox. At the bottom are 'Save' and 'Close' buttons.

Shared to	Can manage?	Actions
/platform/administrators	No	
/platform/administrators:*.manager	Yes	

Address book: administrators

User

Group

Can manage? ☐

2. Select certain users or groups you want to grant permissions. For more details, see [here](#).
3. Tick the **Can manage?** checkbox if you want to grant the **Manage** permission to your selected users/group.

## 4.3. Email your contacts

- [Create a Mail account](#)

Steps to create a mail account that connects to another mail POP3 or SMTP supported servers and ways to edit/delete your account as well further information about Incoming and Outcoming mail server settings.

- [Get mails](#)

Steps to fetch messages from the remote mail servers and forward them via SMTP, so it can be read in **Mail**.

- [Mail views](#)

Introduction to the different view modes in **Mail**.

- [Read an email](#)

Instructions on how to open an email and to perform other actions, such as downloading attachments, marking as read, starring messages, moving to folder, marking as spam, deleting messages.

- [Compose a new message](#)

Steps to compose a new message and to perform other actions: adding attachments, saving as draft, setting priority level, changing message signatures and message preferences.

- [Reply to a message](#)

Steps and ways to reply to the sender only or to all recipients of the message.

- [Forward a message](#)

Steps to re-send messages to other people.

- [Print a message](#)

Steps to take a hard copy of the message, provided that your device is connected to a printer, either directly or through a network connection.

- [Export a message](#)

Steps to back up your messages, then import them into your another accounts.

- [Import a message](#)

Steps to import a message from your device to your selected folder.

- [Categorize messages by folders/tags/filters](#)

Ways to manage message by using folders, tags or by creating a filter to categorize message.

- [Search for messages](#)

Introduction to 2 search modes (Quick and Advanced) supported by the **Mail** application, and ways to use them.

- [Add an event](#)

Steps to invite your colleagues to join events. You can create events, invite them by sending message or make email notifications to receive reminders right in the **Mail** application.

- [Manage Address Book in Mail](#)

Introduction to some actions related to managing contacts and address books in **Mail**, and steps to perform them, including: adding a new address book/contact, editing contact details and deleting a contact.

- [Change Mail settings](#)

Steps and details to change the **Mail** settings to your preferences, including basic information, options when **Mail** gets a "Return Receipt" request, the **Mail** layout, and delegation of your account to any registered user in the system.



#### Note


The **Mail** portlet and its services are deprecated. It remains fully supported for eXo customers, however it will not receive any enhancement and will be removed from the product scope in future.

#### See also

- [Manage your calendar](#)
- [Manage your contacts](#)
- [Chat with your contacts](#)

### 4.3.1. Create a Mail account

To get mails from other mail services, you first need to create a mail account in the **Mail** application which connects to another mail POP3 or SMTP supported servers, such as Gmail, Yahoo! Mail, Hotmail, GMX, Cyrus, Exchange Server. The **Mail** application allows you to get mails from different mail services at one place.

To create one mail account, you first need to click , then select **Add Account** from the drop-down menu to open the **Create New Account** form. In the **Create New Account** form, there are 5 steps with clear instructions at each step. After completing information at each step, you can:

- Click **Next** to go to the next step, or directly left-click any number box at the left bottom of the **Create New Account** form to go to your desired step.

Steps: 1 2 3 4 5

- Click **Back** to return to the previous step.



#### Note

The asterisk (\*) next to each field indicates the required field.



1. Fill your account name and brief description in Step 1.

**Create New Account**

**Step 1: Account Name & Description**

- Enter a name to identify this account. For example, "Marry at work".
- Give a short description about the account. For example, "Emails at work".

Account Name  \*

Description

Steps: **1** 2 3 4 5

Next Cancel

2. Configure identification settings for your mail in Step 2.

**Create New Account**

**Step 2: Mail Identity Settings**

- The mail identity is the display name and the email address used in your emails. Each mail account has an identity which is displayed to the recipients of your emails.

Your Display Name  \*

Email Address  \*

Reply-to Address

Signature

Steps: 1 **2** 3 4 5

Back Next Cancel

Details:

Field	Description
<b>Your Display Name</b>	The name to be displayed when you use the account. This name will be displayed with your email address when you compose a new message.
<b>Email Address</b>	The email address corresponding to your created account. It must be in a valid format. (See more details about the <b>Email Address</b> format <a href="#">here [6]</a> .)
<b>Reply-to Address</b>	The email address which receives all replies.
<b>Signature</b>	The identification text which is automatically inserted at the bottom of your sending messages.

3. Give the server information in Step 3.

**Create New Account**

**Step 3: Server Information**

- Select the type of the mail service that you are using.
- Enter the incoming and outgoing mail servers, for example, mail.yourcompany.com.
- If in doubt, contact your system administrator.

Service type:

Incoming Mail Server:  \*

Use Incoming SSL: ☒

Outgoing Mail Server:  \*

Use Outgoing SSL: ☒

Steps: 1 2 3 4 5

Back Next Cancel

**Details:**

Field	Description
<b>Server type</b>	<p>Type of the mail server. Select either of two types supported by your mail server:</p> <ul style="list-style-type: none"> <li>- POP3 (Post Office Protocol - Version 3) which is a protocol to get emails from a remote server. This type is selected by default.</li> <li>- IMAP (Internet Message Access Protocol) which retrieves emails from a remote server over a TCP/IP connection.</li> </ul>
<b>Incoming Mail Server &amp; Outgoing Mail Server</b>	<p>The Incoming Mail Server (POP3) and Outgoing Mail Server (SMTP) of your current email provider. Each email provider has different Incoming Mail Server and Outgoing Mail Server settings. By default, the value of this field is "pop.gmail.com" and "smtp.gmail.com" which are the settings for Gmail. For settings of other mail servers, you can find the information on their websites. See <a href="#">More about Incoming &amp; Outgoing mail server settings</a> for more information.</p>
<b>Use Incoming SSL</b>	<p>This option allows using SSL (Secure Sockets Layer) or not. SSL is a cryptographic protocol which provides secure communication on Internet, such as web browsing, email, Internet faxing. The Incoming SSL allows using SSL to check incoming emails.</p>
<b>Use Outgoing SSL</b>	<p>This option is to use SSL to send mail in the <b>Mail</b> application.</p>

**4. Configure another account properties in Step 4.**

**Create New Account**

**Step 4: User Name & Password**

- Enter your username and password to connect to the mail server. For example, "mary@gmail.com" and "password".

Username:  \*

Password:  \*

Save Password: ☒

Do not download all messages (IMAP only): ☒

Limit to Messages Arrived Since:

Steps: 1 2 3 4 5

Back Next Cancel

**Details:**

Field	Description
<b>Username</b>	The email address which is used in the <b>Mail</b> application.
<b>Password</b>	The password of your email address. It will be used to get your messages of the email address entered in the <b>Username</b> field.
<b>Save Password</b>	Tick the checkbox to avoid entering your password again for each mail check.
<b>Do not download all messages (IMAP only)</b>	Check this option if you do not want to download all messages.
<b>Limit to Messages Arrived Since</b>	Select the time to limit the downloaded messages from the drop-down calendar.

5. Verify your inputted information in Step 5.

**Create New Account**

**Step 5: Verify Information**

- Please verify that the information below is correct before completing the setup and exiting the Account Wizard.

Account Name: JohnSmith

Your Display Name: John Smith

Email Address: john.smith@exoplatform.com

Incoming Mail Server: imap.gmail.com

Service type: imap

Fetch New Messages From: Inbox

Start Downloading Messages Now: ☐


Steps: 1 2 3 4 5


Back Finish Cancel

- Tick the **Start Downloading Messages Now** checkbox to get messages automatically right after your account is successfully created.

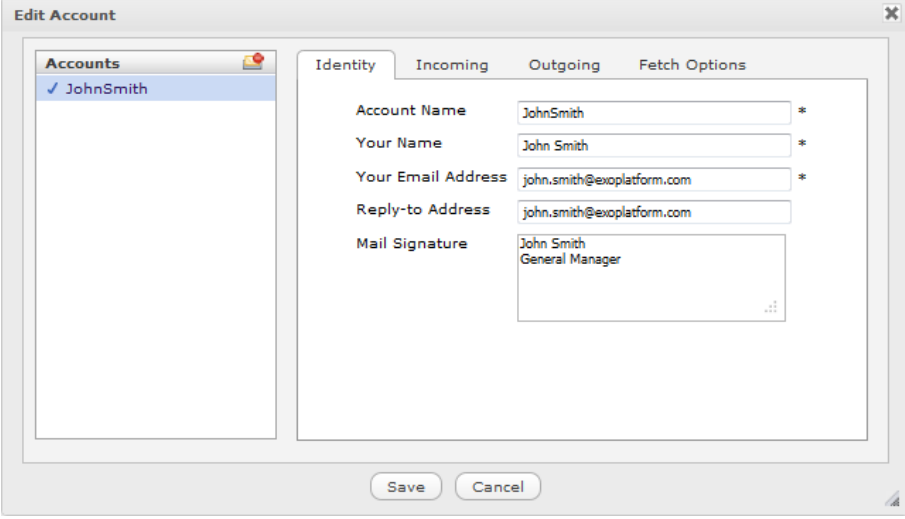
6. Click **Finish** to complete your registration.

### 4.3.1.1. Edit your account details

To make changes on your account, simply click  in the left pane, then select **Edit Account** from the drop-down menu;

Or, select  **Accounts** on the **Toolbar**.

The **Edit Account** form will appear, allowing you to change information in the **Identity**, **Incoming**, **Outgoing** and **Fetch Options** tabs.



**Edit Account**

**Accounts**

- ✓ JohnSmith

**Identity** | Incoming | Outgoing | Fetch Options

Account Name: JohnSmith \*

Your Name: John Smith \*

Your Email Address: john.smith@exoplatform.com \*

Reply-to Address: john.smith@exoplatform.com

Mail Signature: John Smith  
General Manager

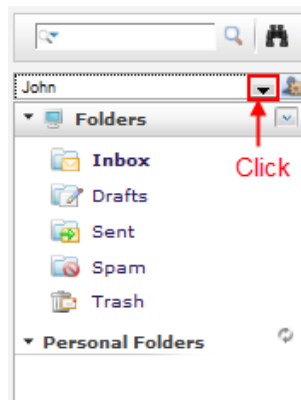
Save Cancel

### 4.3.1.2. Delete your account

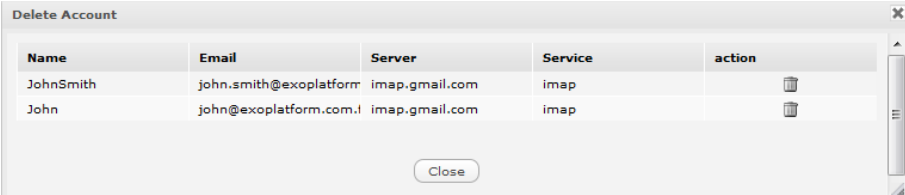
If you use multiple accounts, you can delete any unused mail accounts via either of the following ways:

#### The first way



1. Select the account from the accounts list in the left pane.



2. Click  in the left pane and select **Delete Account** from the drop-down menu.





**Delete Account**

Name	Email	Server	Service	action
JohnSmith	john.smith@exoplatform.com	imap.gmail.com	imap	
John	john@exoplatform.com	imap.gmail.com	imap	

Close

3. Click  corresponding to the account, then click **OK** in the confirmation message to accept your deletion.

#### The second way

1. Open the **Edit Account** form as stated in [Edit your account details](#).
2. Select the account you want to delete in the left pane. Your currently selected account is marked with .
3. Click  to delete your marked account.

### 4.3.1.3. More about Incoming & Outgoing mail server settings

The following reference introduces some common Incoming and Outgoing Mail Server settings. Provided that you are aware of the server type and name, you can start creating your mail accounts quickly. If you do not see your mail service in this list, find these settings on the mail provider websites. Remember that the **Mail** application only supports POP3 and SMTP mail servers.

#### Yahoo! Mail settings

- Yahoo Incoming Mail Server (POP3): pop.mail.yahoo.com (port 110)
- Yahoo Outgoing Mail Server (SMTP): smtp.mail.yahoo.com (port 25)
- Gmail (Google Mail) settings
- Gmail Incoming Mail Server (POP3): pop.gmail.com (port 995)
- Gmail Outgoing Mail Server (SMTP): smtp.gmail.com (port 465)

#### Hotmail settings

- Hotmail Incoming Mail Server (POP3): pop3.live.com (port 995)
- Hotmail Outgoing Mail Server (SMTP): smtp.live.com (port 25)

#### MSN Mail settings

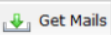
- MSN Incoming Mail Server (POP3): pop3.email.msn.com (port 110)
- MSN Outgoing Mail Server (SMTP): smtp.email.msn.com

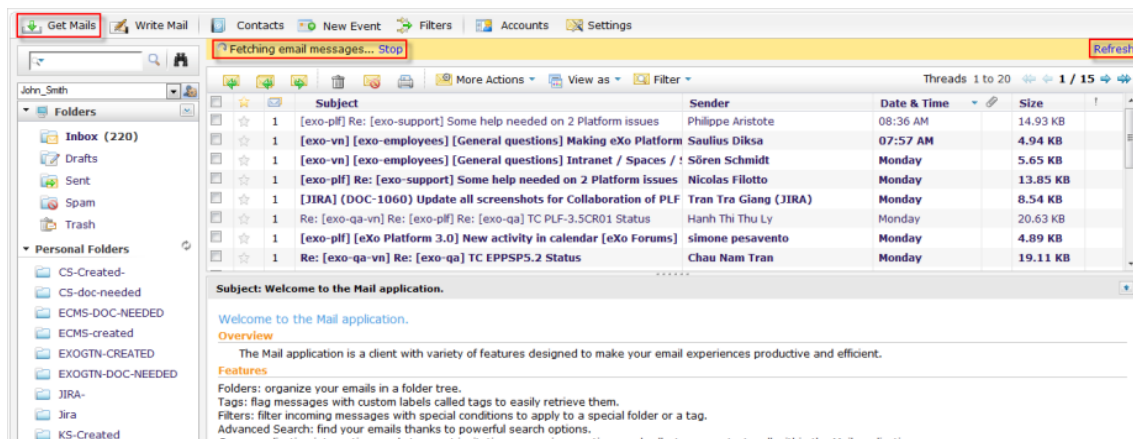
#### AOL Mail settings

- AOL Incoming Mail Server (IMAP) - imap.aol.com (port 143)
- AOL Outgoing Mail Server - smtp.aol.com


### 4.3.2. Get mails

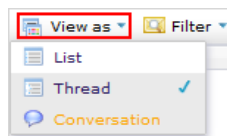
This function is used to receive messages from the remote mail servers and forward them via SMTP, so it can be read in Mail. It supports any mail servers with POP3, IMAP, SMTP, such as Gmail, Hotmail, Yahoo! Mail, GMX, MS Exchange.

1. Click the folder you want to check for new mails. If no folder is selected, the default folder will be **Inbox**.
2. Click  on the **Toolbar**. The status notification with '**Fetching email messages...**' shows that emails are being loaded. All arrived mails are shown in the messages pane. Click **Refresh** if you want to refresh the fetching mails.



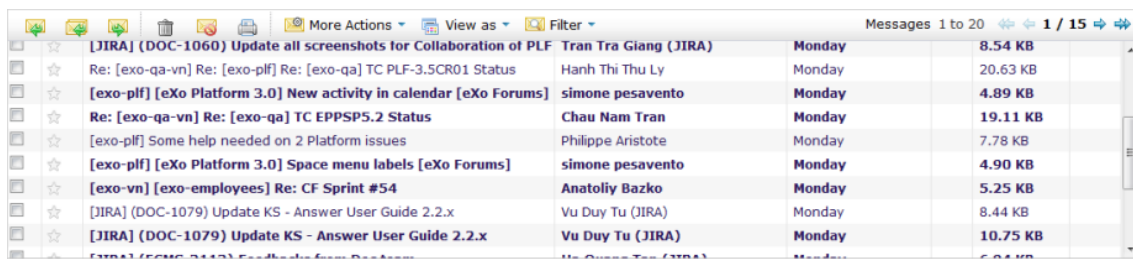
### 4.3.3. Mail views

This function offers three options for viewing messages in your mailbox. Messages are displayed by date, where receipt hours are for today mails and dates are for mails received in previous days. You simply toggle between 3 views by clicking **View as** and selecting either of the views. The selected view is marked with .



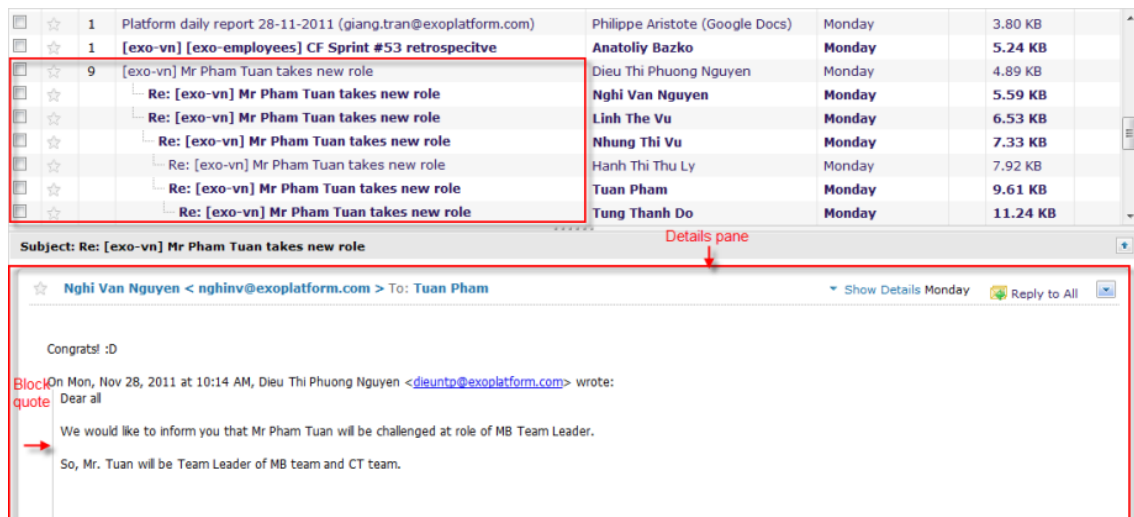
#### List view

In this view mode, all messages are arranged as a list.



#### Thread view

Messages are arranged as a tree structure. All replies are shown as sub-nodes. When you click one message, its content is displayed in the message details pane with block quotes containing content of the parent messages.



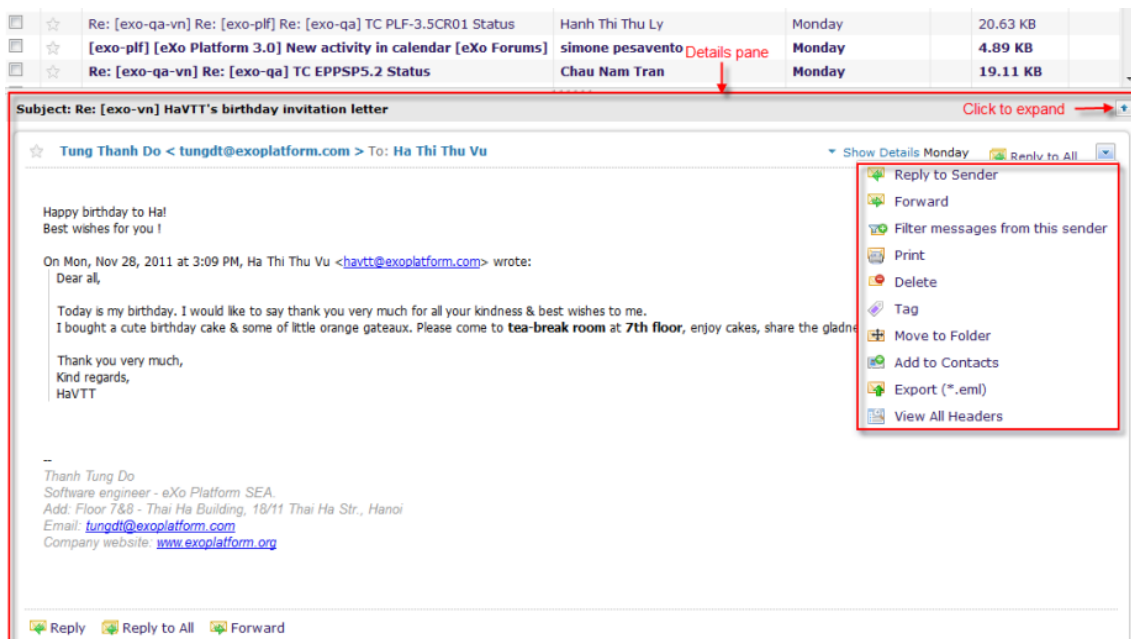
### Conversation view

When this view mode is selected, only the subject of parent message and the number of replies in the conversation are displayed in the messages list pane. When being opened, all messages are shown in the message details pane with separate reading pane which can be expanded by left-clicking the relevant reading pane.



### 4.3.4. Read an email



If you want to read an email, simply click your preferred mail in the mails list and scroll down to read your selected email in the details pane.



#### 4.3.4.1. Download an attached file

This function offers three options for viewing messages in your mailbox. Messages are displayed by date, where receipt hours are for today mails and dates are for mails received in previous days. You simply toggle between 3 views by clicking **View as** and selecting either of the views. The selected view is marked with ☒.

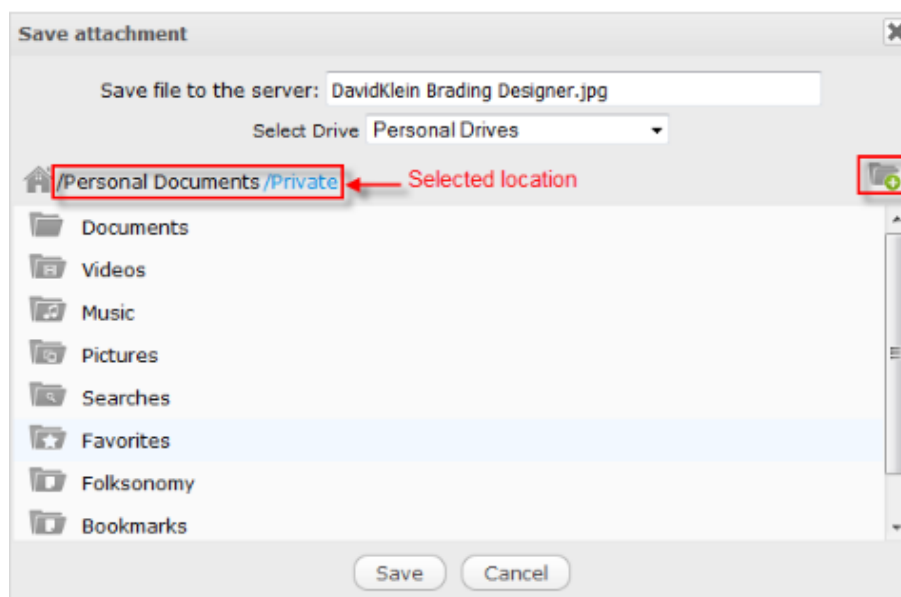


Click  **Download** to download an attachment to your local system. If the uploaded file is image, you can also click  **View** to preview the image without downloading.

#### Download and save attachments to server

1. Open the mail with attachments.
2. Click **Save to server** to open the **Save attachment** form.





3. Change the name of the downloaded file in the **Save file to the server** field if needed.
4. Select a drive category from the **Select Drives** drop-down menu. The number of shown drive categories depends on your role.
5. Select one drive from the drives list to open a list of folders.
6. Select one folder which stores your downloaded file from the folders list.
  - Click to create a new folder in your selected drive.



#### Note

Your selected location is shown in the breadcrumb.

7. Click **Save** to finish downloading the attachment to the server.

### 4.3.4.2. View all headers of a message

By default, the header's information shows email addresses of the sender and recipients and the mail subject. If you want to view full headers of a message, do as follows:

1. Open the message which you want to view its full headers.
2. Click at the right corner of message's content and select **View All Headers** from the drop-down menu. All message headers are then appeared in the pop-up window.

### 4.3.4.3. Mark/Unmark a message as read

In the **Mail** application, the unread mails will be recognized in the bold format in the mails list pane, meanwhile the read mails will be unbold.

#### Mark a message as read

##### The first way

1. Select checkboxes corresponding to messages you want to mark as read.
2. Click **More Actions**, then select **Mark as Read** from the drop-down menu.

### The second way



#### Note

This way is used to mark all unread messages in a specific folder.

1. Right-click the folder which contains messages you want to mark as read.
  2. Select **Mark all as read** from the drop-down menu.
- After being marked as read, all unread messages inside the folder will be marked as read.

### Mark as unread

1. Select the messages you want to mark as unread.
2. Select **Mark all as read** from the drop-down menu.


## 4.3.4.4. Star/Unstar a message

### Star a message

#### The first way

2. Click **More Actions**, then select **Mark as Unread** from the drop-down menu.


#### The second way

In the messages list pane, click  next to the message you want to add a star.

After being marked, the selected messages will be appended with , so that you can recognize them quickly.

### Unstar a message

Simply select **Unstar** from the **More Actions** drop-down menu on the action bar;

Or, click  next to the message.

## 4.3.4.5. Move a message to other folders

#### The first way


1. Open the **Move Message** form via one of the following ways.

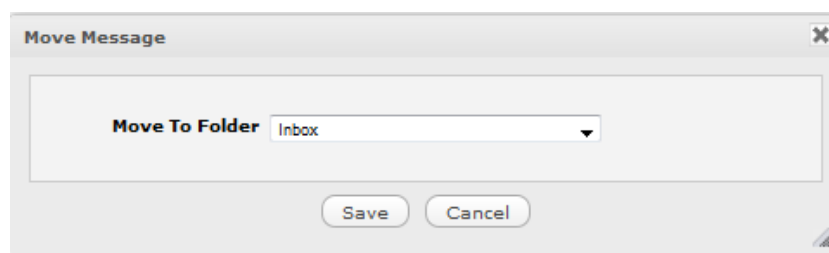
#### The first way

Right-click the message you want to move to another folder in the messages list pane, and select **Move to Folder** from the drop-down menu;

#### The second way

Tick the checkbox corresponding to the message you want to move, then click **More Actions** on the action bar and select **Move** from the drop-down menu.

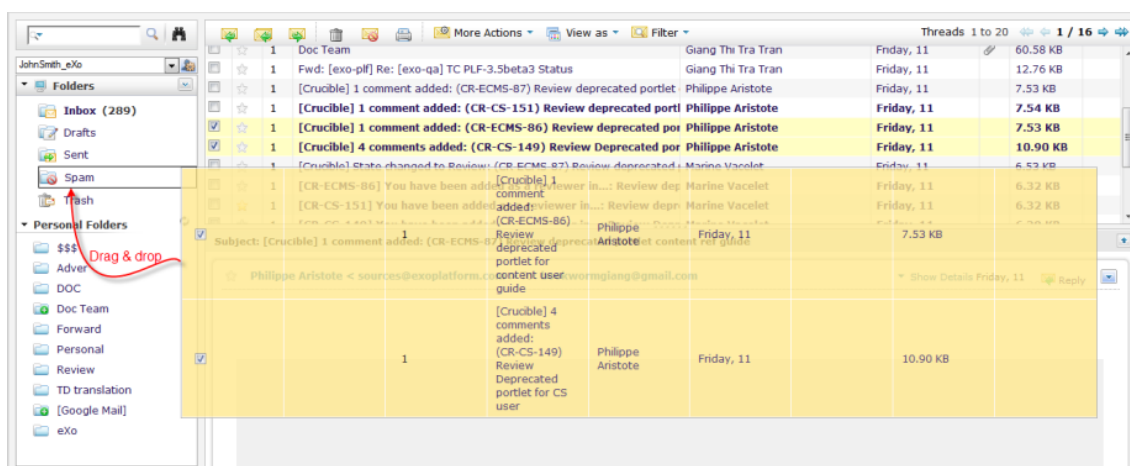
2. Tick  next to the **Move To Folder** field to select your desired destination folder from the drop-down menu.



3. Click **Save** to move messages to your selected folder.


### The second way

In the mails list pane, tick the message you want to move, then drag and drop it into your desired destination folder in the left pane.



### 4.3.4.6. Report a message as spam

#### The first way

Simply tick the checkbox corresponding to the message you want to report as spam, then click  on the **Action** bar.


#### The second way

Drag the message in the right mails list pane and drop it into the **Spam** folder in the left pane.

- The selected email will be moved to the **Spam** folder. Go into the **Spam** folder to verify that the selected message has been moved to it.
- All messages marked as spam will be moved to the **Spam** folder.

### Unspam a message

1. Go to the **Spam** folder, then tick the checkbox corresponding to the relevant message.

2. Click  on the **Action** bar.

The spam message will be removed from the **Spam** folder. All messages from this sender will be received normally.


### 4.3.4.7. Delete a message

#### Delete a message temporarily

#### The first way

Right-click the message, then select **Delete** from the drop-down menu.

### The second way

Tick the checkbox corresponding to the message you want to delete, then select  on the **Action** bar.

### The third way

Drag the message in the mails list pane and drop it into the **Trash** folder in the left pane.

- All temporarily deleted messages will be in the **Trash** folder.

### Delete a message permanently



#### Note

All messages which have been deleted permanently cannot be restored any longer. To delete a message permanently, the message should first be in the **Trash** folder. It means that the message should [have been deleted \[225\]](#) temporarily.

1. Select the **Trash** folder in the left pane to see all messages in this folder.
2. Right-click the relevant message, then select **Delete** from the drop-down menu;

Or, tick the checkbox corresponding to the relevant message, and click  on the action bar.

### Undelete a message



#### Note

This function is only for messages which have been TEMPORARILY deleted.

### The first way

1. Select the **Trash** folder in the left pane to see the list of temporarily deleted messages in the right mails list pane.
2. Tick the checkbox corresponding to the message you want to undelete.
3. Drag and drop the message into another folder.

### The second way


Open the **Trash** folder, then use the [Move](#) function to remove the message from the **Trash** folder.

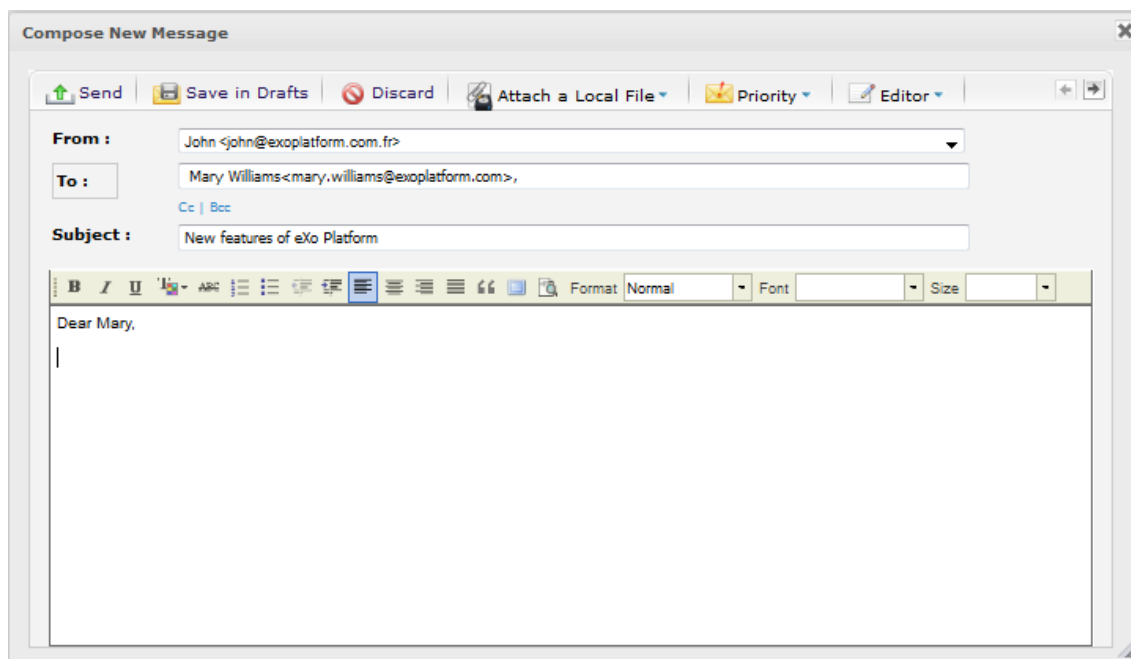
## 4.3.5. Compose a new message

In this section, you will know to [compose a message \[226\]](#), [send message to multiple recipients \[228\]](#) and perform useful tasks when composing a message:

- [Attach a file to a message \[229\]](#)
- [Save a message as draft \[230\]](#)
- [Set a priority level \[230\]](#)
- [Change the message signature \[230\]](#)
- [Change message preferences \[230\]](#)

### Compose a message

1. Click  on the **Toolbar** to open the **Compose New Message** form.



2. Specify the sender's email address from the **From** field.



3. Enter email addresses of recipients into the **To** field.

The **To** box must always contain at least one address; everyone who receives your message can see the addresses in the **To** box.



### Note

You can use **CC** and **BCC** to send mail to more than one person easily and quickly.


Use the **CC** (Carbon Copy) box for the addresses of people you want to send a copy of the message to other recipients. Everyone who receives your message can also see the addresses in the CC box. If someone responds to your message using "Reply to all", the carbon-copied recipients also receive the message.

**BCC** (Blind Carbon Copy) mails are private to the sender and the BCC recipients. Use BCC when you want to send the message to undisclosed recipients. It means you send the message to people and they do not know about other recipients. Addresses listed in the BBC box will not receive replies sent to this message.

4. Enter a few words into the **Subject** box to give the general topic to recipients.

5. Enter your message in the text-input field. You can use this toolbar to format the message text.



Click  on the Mail toolbar to switch between **Rich Text** and **Plain Text** editors. If **Rich Text** is selected, the message text can be composed with format tools, meanwhile **Plain Text** only allows you to compose a message with the simple text format.

6. Click  to send your message. Click  to discard composing your new message.

**Note**

Sent mails will be saved in the **Sent** folder. In case emails of recipients do not exist in your Address Book, they will be added automatically to the **Collected Address** in the **Contact** application.

**Send message to multiple recipients****The first way**

Type more email addresses by separating them with commas.

The screenshot shows the 'From' field with 'John <john@exoplatform.com.fr>' and the 'To' field with 'Mary Williams<mary.williams@exoplatform.com>, John Smith<john.smith@acme.exoplatform.com>,'.

If your typed address matches one or more addresses in your Address Book, the list of matching addresses will appear and you can click one address to select.

The screenshot shows the 'To' field with a dropdown list of matching addresses: 'John Smith<john.smith@acme.exoplatform.com>', 'John Smith<johnsmith@exoplatform.com>', and 'Mary Williams<mary.williams@exoplatform.com>'.

**The second way**

Select one or more contacts from your Address Book.

1. Click the **To** button.

The screenshot shows the 'To' button highlighted with a red box and a red arrow pointing to it. The text 'Click' is written next to the arrow.

The **Contacts** window listing all of your contacts will appear.

The screenshot shows the 'Contacts' window with a search bar, a 'Send To All' checkbox, and a dropdown menu for 'Address Book' set to 'All Contacts'. The list of contacts is as follows:

Name	Email
<input type="checkbox"/> James Davis	james.davis@acme.exoplatform.com
<input type="checkbox"/> Root Root	root@localhost
<input type="checkbox"/> Mary Williams	mary.williams@acme.exoplatform.com
<input type="checkbox"/> Jack Miller	jack.miller@acme.exoplatform.com
<input type="checkbox"/> John Smith	john.smith@acme.exoplatform.com
<input type="checkbox"/> John Smith	johnsmith@exoplatform.com
<input type="checkbox"/> Mary Williams	mary.williams@exoplatform.com

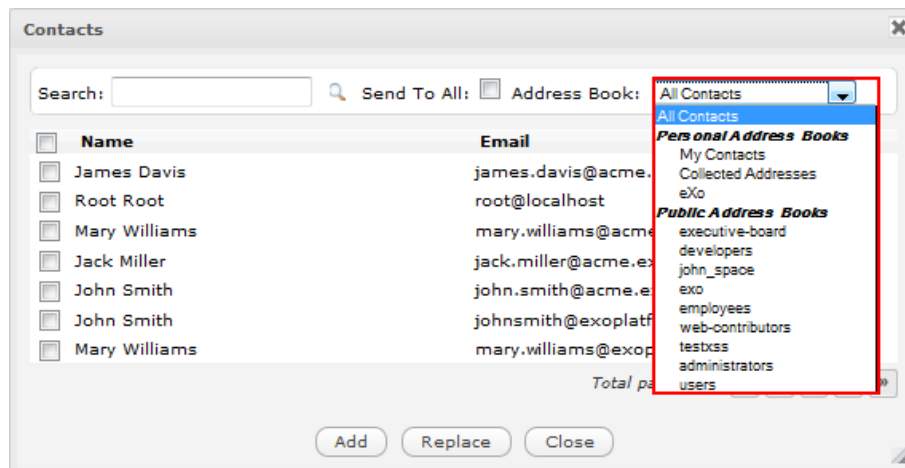
At the bottom, there are buttons for 'Add', 'Replace', and 'Close', and a pagination bar showing 'Total pages: 1'.

2. Tick the checkboxes corresponding to the contacts who will receive your message.

Also, you can

- Search for email addresses in a specific address book as follows:

- i. Type the contact name in the search box.
- ii. Define the address book where you want to search for your entered contact name to limit the search results in the **Address Book** select-box.




iii. Click  to perform your search.

- Tick the **Send To All** checkbox if you want to send the email to the contacts defined in the **Address Book** select-box.

3. Click **Add** to add your selected email addresses to the **To** box, or **Replace** to replace the current email addresses in the **To** field with your newly selected ones.



### Attach a file to a message

#### Attach a local file

1. Click  in the **Compose New Message** form to open the **Attach Files** window.
2. Click **Browse...** to open the **File Upload** form.
3. Browse the file from your device, then click **Open** to upload your selected file.
  - Open more **Attach File** fields by simply clicking [\[Add More\]](#).
4. Click **Save** to accept your attachments and go back to the **Compose New Message** form.

You will see your uploaded files in the **Attachments** area of the **Compose New Message** window.

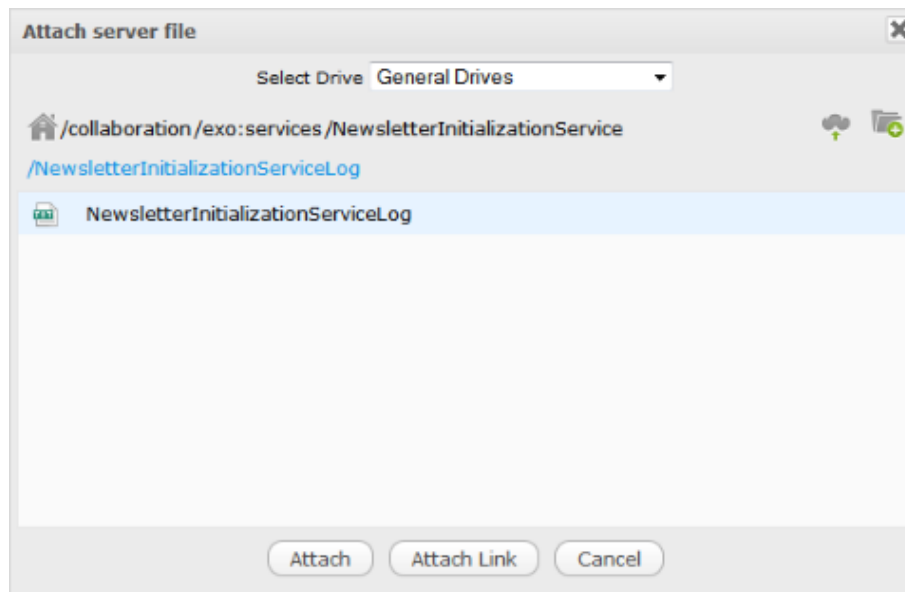


- Click  to download or see if your uploaded file is correct or not without browsing the file on your device.
- Click  next to the attached file to remove it from your message.

#### Attach a server file

This function is only featured in eXo Platform 3.5, allowing you to browse and attach one file from your server as follows.

1. Click  next to the **Attach a Local File** in the **Compose New Message** form, then select **Attach a Server File** from the drop-down menu.



2. Follow steps 4, 5, and 6 as stated in the [Download and save attachments to server](#) section.

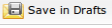
3. Click the server file from the files list of your selected folder.

- Click  if you want to upload a file from your device.

4. Click **Attach** to upload your selected source file into the message;

Or, click **Attach Link** to get the link pointing to the selected source file that is shown in your message body. The **Attach Link** function allows your mail recipients to download the attached source file just clicking the relevant link.

#### Save a message as draft

If you are not ready to send your composed message, click  to save it as draft. Your draft message will be in the **Drafts** folder for you to send whenever you like.


#### Set a priority level

The priority levels set to a message allow recipients to define if one received message is at a high, or normal, or low importance level. It means that when a message is set at the high priority level, its recipients need to read as soon as possible.

This useful tool can be done with a few clicks when you are composing a new message.

1. Click  in the **Compose New Message** form.

2. Select your preferred priority from the drop-down menu.

- **Low**: The exclamation icon corresponding to the mail is marked in grey in the  column.
- **Normal**: There is no the exclamation icon. By default, the message is sent with the **Normal** priority.
- **High**: The exclamation icon is marked in red.


#### Change the message signature

A message signature is an identification text which is automatically inserted at the bottom of your sending messages. You can change this signature by [editing your account details](#).

#### Change message preferences



At present, this function only allows you to receive a notification message that the recipient has already read your message or not.


1. Click  **Options** in the **Compose New Message** form.
2. Select the **Return Receipt** option from the drop-down menu. However, seeing the notification message or not also depends on the **Return Receipts** configuration of the recipient in the **Change Mail settings** section.

### 4.3.6. Reply to a message

#### Reply to the sender only

1. Open the **Reply** form via either of 3 ways:


##### The first way

Tick the checkbox corresponding to the message you want to reply in the mails list pane, then click  on the action bar.

##### The second way

Right-click the message you want to reply, then select **Reply** from the drop-down menu.


##### The third way

Click the message that you want to reply to display its content, then select  at the upper right corner of the message content.

2. Compose the content in the **Compose New Message** window.

3. Click  **Send** to send your reply.

#### Reply to all recipients of the message

1. Tick the checkbox corresponding to the message you want to reply, then click  on the **Action** bar;

Or right-click the message, then select **Reply to All** from the drop-down menu.

2. Compose your reply message in the **Compose New Message** window, then click  **Send** to send your reply.


### 4.3.7. Forward a message

This function allows you to resend a message, which has been delivered to your email address, to another email addresses.

1. Open the **Compose New Message** window via either of 3 ways.


- i. Tick the checkbox corresponding to the message which you want to forward, then click  on the action bar.

- ii. Or, right-click the message, then select **Forward** from the drop-down menu;

iii. Or, open the message which you want to forward, then click  at the upper right corner of the message content, and select **Forward** from the drop-down menu.

The **Compose New Message** window will be displayed with the original content of the message you want to forward.

2. Enter the recipient's email address in the **To** field.

3. Click  **Send** to forward the message.



#### Note

Before forwarding a message, you can edit it to your desires that is similar to [composing a new message](#).


### 4.3.8. Print a message

This function helps you take a hard copy of the message, provided that your device is connected to a printer, either directly or through a network connection.


#### The first way

Right-click the message which you want to print and click **Print** from the drop-down menu.

#### The second way

Tick the checkbox corresponding to the message, then click  on the action bar.

#### The third way

Open the message, then click  at the upper right corner of the message content and select **Print** from the drop-down menu.

You will be directed to the **Print Preview** page. Here, click **Print** to start printing.


### 4.3.9. Export a message

This function allows you to back up your messages, then import them into your another accounts. Messages are exported in the \*.eml file.

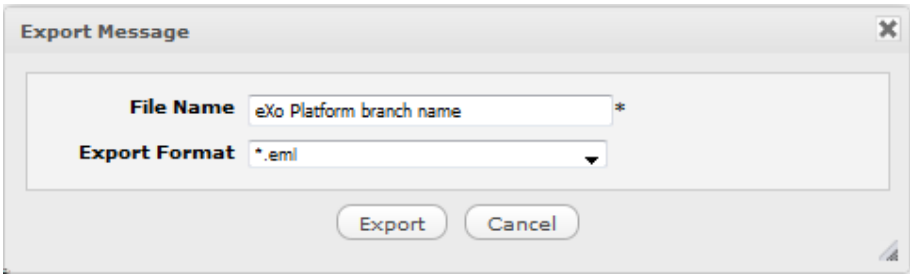
1. Open the **Export Message** form via either of 3 ways.

i. Right-click the message that you want to export, then select **Export** from the drop-down menu;

ii. Or, tick the checkbox corresponding to the message, then click **More Actions** on the action bar and select **Export** from the drop-down menu;

iii. Open the message, then click  at the upper right corner of the message content and select **Export (\*.eml)** from the drop-down menu.

The **Export Message** form will appear.



2. Change the file name in the **File Name** field if needed, and select the export format. At present, only the \*.eml format is supported.

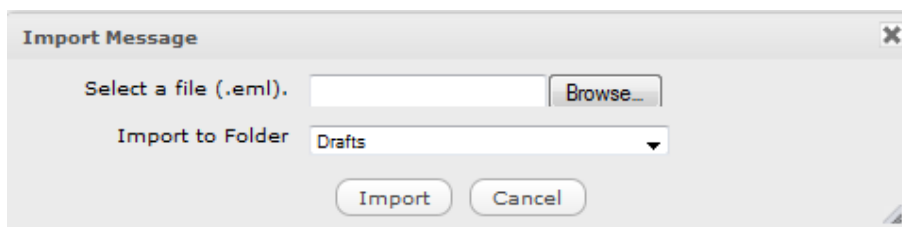
3. Click **Export** to accept exporting your selected message.

### 4.3.10. Import a message

The function is used to import a message from your device to your selected folder in **Mail**.

1. Click **More Actions** on the action bar and select **Export** from the drop-down menu.

The **Import Message** form will appear.



2. Click **Browse...** to get one *.eml* file from your device.

3. Select the folder into which you want to import the message in the **Import to Folder** field.

4. Click **Import** to accept importing your selected file.



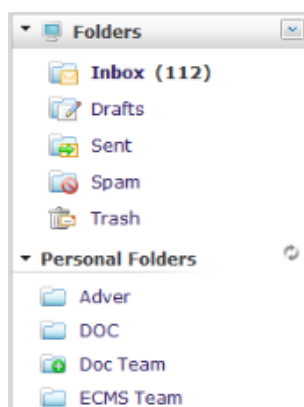
#### Note

By default, your imported file must be in the \*.eml format.

### 4.3.11. Categorize messages by folders/tags/filters

#### 4.3.11.1. Categorize by folder

Folders help you manage your messages more easily and flexibly. Once your new mail account is created successfully, five default folders, including **Inbox**, **Drafts**, **Sent**, **Spam**, **Trash**, will be automatically generated. You cannot delete, rename or move these folders.




**Details:**

Folder	Description
<b>Inbox</b>	Store all incoming messages.
<b>Drafts</b>	Store all messages which have been composed but not sent yet.
<b>Sent</b>	Store all sent messages.

Folder	Description
<b>Spam</b>	Store all messages suspected of being unwanted messages.
<b>Trash</b>	Store temporarily deleted messages.
<b>Personal Folders</b>	Store folders which are created by yourself.

Categorizing by folders can be performed via the following actions:

#### Create a new folder

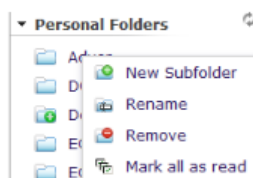
1. Click  on the **Folders** pane, then select **Add** from the drop-down menu.
2. Enter the folder name into the **Folder name** field. Special characters are not accepted in this field.
3. Click **Save** to complete adding your new folder.



#### Note

Your created folder will be displayed in the **Personal Folders** pane.

By right-clicking any folder under the **Personal Folders** pane, you will see the drop-down menu as follows.



Here you can manage personal folders through the following actions:

- [Create a sub-folder \[234\]](#)
- [Rename a folder \[234\]](#)
- [Remove a folder \[234\]](#)
- [Mark a folder as read \[235\]](#)



#### Note

All above actions are only for folders/sub-folders under the **Personal Folders** pane.

#### Create a sub-folder

1. Select **New Subfolder** from the drop-down menu.
2. Follow steps as stated in the [Create a new folder \[234\]](#) section.

#### Rename a folder

1. Select **Rename** from the drop-down menu.
2. Enter a new name in the **New Folder Name** field of the **Remove Folder** form.
3. Click **Save** to finish your removal.

#### Remove a folder

1. Select **Remove** from the drop-down menu.
2. Click **OK** in the confirmation message to accept your deletion.

#### Mark a folder as read

This function is to mark all mails of a personal folder as read by clicking **Mark all as read** from the drop-down menu.

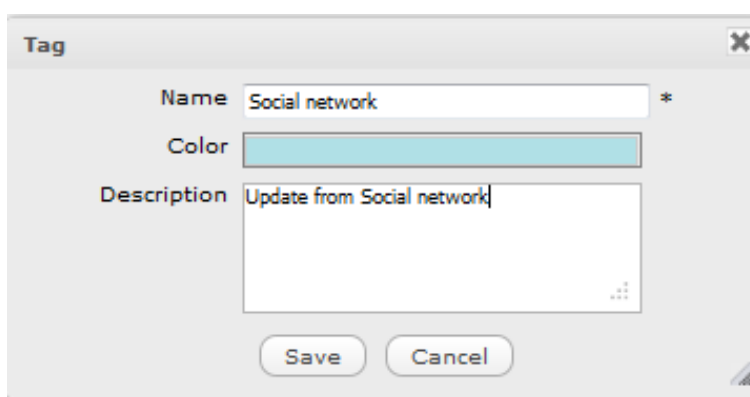
#### 4.3.11.2. Categorize by tag

Tags are used as labels for filtering or categorizing messages from different folders. You can add more than one tag to a message. Using tags makes easy for you to find messages independently from the folder where they are stored.

You can categorize by tags through the following actions:

#### Create a tag

1. Click  on the **Tags** pane of the right pane and select **Add New Tag** from the drop-down menu to open the **Tag** form.



#### Details:

Field	Description
<b>Name</b>	The new tag name.
<b>Color</b>	The tag color.
<b>Description</b>	The brief description of the tag.

2. Fill in required fields, then click **Save** to finish.

Your newly selected tag will be updated in the **Tags** pane.

#### Assign a tag to a message



#### Note

You can assign a tag to many messages simply by ticking their checkboxes first.

1. Open the **Tag Message** form via one of the following ways.

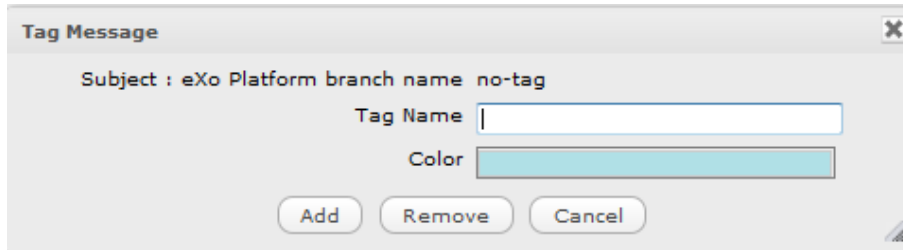
#### The first way

- i. Tick the checkbox corresponding to the message to which you want to assign a tag, then click **More Actions** on the **Action bar**.
- ii. Select **Tag** from the drop-down menu.

#### The second way

Right-click your selected message, then select **Tag** from the drop-down menu;

The **Tag Message** form will be displayed.



The **Tag Message** dialog box is shown. It has a title bar with a close button. Inside, the **Subject** is "eXo Platform branch name no-tag". There is a **Tag Name** text field and a **Color** dropdown menu. At the bottom are **Add**, **Remove**, and **Cancel** buttons.

2. Give a new tag name in the **Tag Name** field. This field contains words and keywords which are used to describe the same messages.

Or, tick the checkboxes corresponding to your desired tags from the tags list.

3. Select one color for the tag from the **Color** drop-down menu.

4. Click **Add** to finish assigning the tags to your selected messages;

#### Untag a message

1. Select a message which has been tagged, then follow [Step 1](#) to open the **Tag Message** form.

2. Click **Remove** to remove the assigned tag from your selected message.



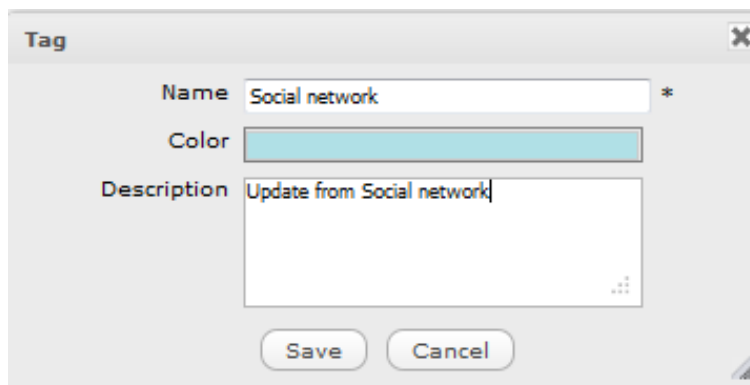
#### Note

To remove one tag from all messages, simply use the [Empty function](#). [236]

#### Edit a tag

1. Right-click a tag name in the **Tags** pane, and click **Edit** from the drop-down menu.

The **Tag** form will appear.



The **Tag** dialog box is shown. It has a title bar with a close button. Inside, there is a **Name** text field with "Social network" and an asterisk, a **Color** dropdown menu, and a **Description** text area with "Update from Social network". At the bottom are **Save** and **Cancel** buttons.

2. Make changes on the tag, then click **Save** to save your changes.

#### Remove a tag

Right-click the tag that you want to remove in the **Tags** pane, then select **Remove** from the drop-down menu.

The selected tag will be removed from the tags list and from all messages.

#### Empty a tag

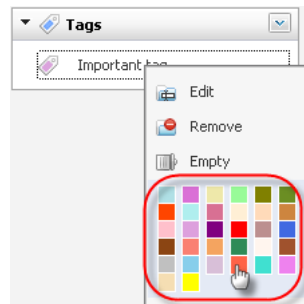
By using this function, you can remove one tag from all messages.

1. Right-click the tag in the **Tags** pane.

2. Select **Empty** from the drop-down menu.

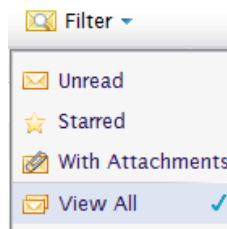
#### Change the tag color

Right-click the tag in the **Tags** pane, then select your desired color from the 32-color palette.



### 4.3.11.3. Categorize by filter

By default, the messages list shows all of your received messages in your inbox but you can filter to specify which message to be displayed.




You can filter messages according to the following criteria:

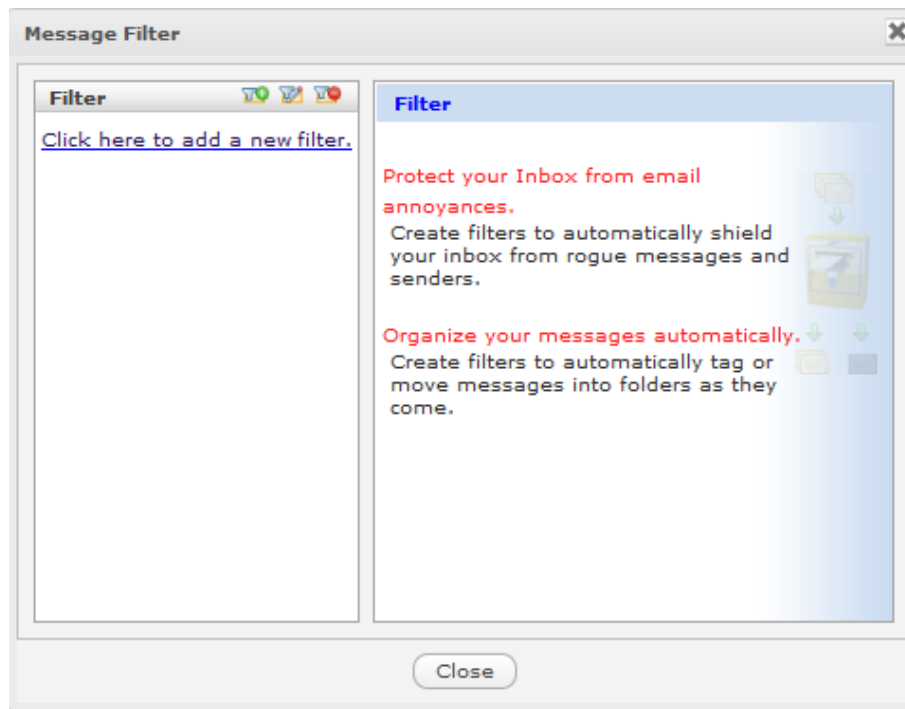
- **Unread:** Only show unread messages.
- **Starred:** Only show starred messages.
- **With Attachments:** Only show messages with attachments.
- **View All:** Show all types of messages.


You can categorize by filter through the following actions:

#### Create a new filter by defining all filter rules

By this way, you need to manually define conditions for the new message filter.

1. Click  **Filters** on the **Toolbar** to open the **Message Filter** form.



2. Click  or the "Click here to add a new filter" link to create a new filter.

The Add/Edit Message Filter will appear.

Details:

Field	Description
Filter Name	The filter name.
From	Filter the email address of sender.
To	Filter the email address of recipient.
Subject	Filter the subject of incoming messages.
Body	Filter the body of incoming messages.
Move the message to folder	The folder to which the filtered messages will be moved.



Field	Description
<b>Apply Tag</b>	Assign the tag to messages matching the filter rules.
<b>Execute now</b>	Take the action right after editing the filter.

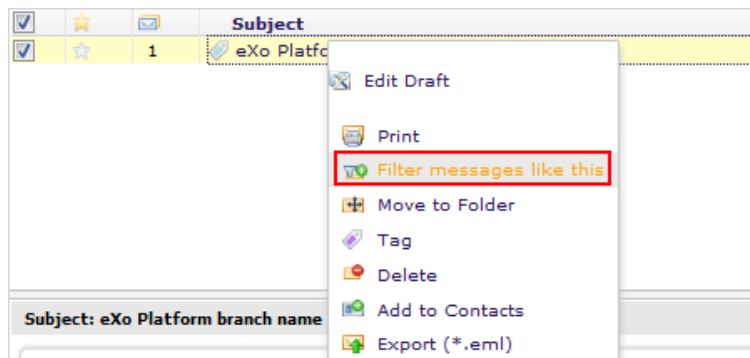
3. Define the rules for the new filter.

4. Click **Save** to finish creating your new filter.

### Create a filter from a message

By this way, you could create a filter which is based on existing conditions of one existing message without defining the filter rules.

1. Right-click a message containing the criteria you want to include in your new filter.





The **Add/Edit Message Filter** form will appear with some pre-defined filter conditions of the current selected message.

2. Modify the rule if necessary, then click **Save** to finish.

The created filter will be displayed in the list. All messages matching the defined filter rules will be affected.

### Edit a filter



1. Click  on the **Toolbar** to open the **Message Filter** form.

2. Click the filter you want to edit in the left pane. Your selected filter is marked with .

3. Click  on the filter bar to open the **Add/Edit Message Filter** form.

4. Change the filter conditions to your desires.
5. Click **Save** to complete your changes.

#### Delete a filter

1. Click  **Filters** on the **Toolbar** to open the **Message Filter** form.
2. Click the filter you want to delete, then select  on the filter bar.
3. Click **OK** in the confirmation message to accept your deletion.

### 4.3.12. Search for messages

The **Mail** application supports two search modes: [Quick search \[240\]](#) or [Advanced search \[240\]](#).















#### Quick search

Quick search allows you to conduct a search with specific keywords in all of your messages. All messages from the different folders that match with your search term will be displayed.

1. Enter your search term into the search box in the left pane.



2. Click . All messages containing the search term will be listed in the search results.

		Subject	Sender	Date & Time 	Size	
		[Inbox] Nexus: Staging Completed.	Nexus Repository Ma	Wednesday	48.72 KB	
		[Inbox] Nexus: Staging Repository Dropped.	Nexus Repository Ma	Thursday	6.00 KB	
		[Inbox] Nexus: Staging Completed.	Nexus Repository Ma	Thursday	6.68 KB	
		[Inbox] Nexus: Staging Completed.	Nexus Repository Ma	Wednesday	79.58 KB	
		[Inbox] Nexus: Promotion Completed.	Nexus Repository Ma	Wednesday	71.49 KB	




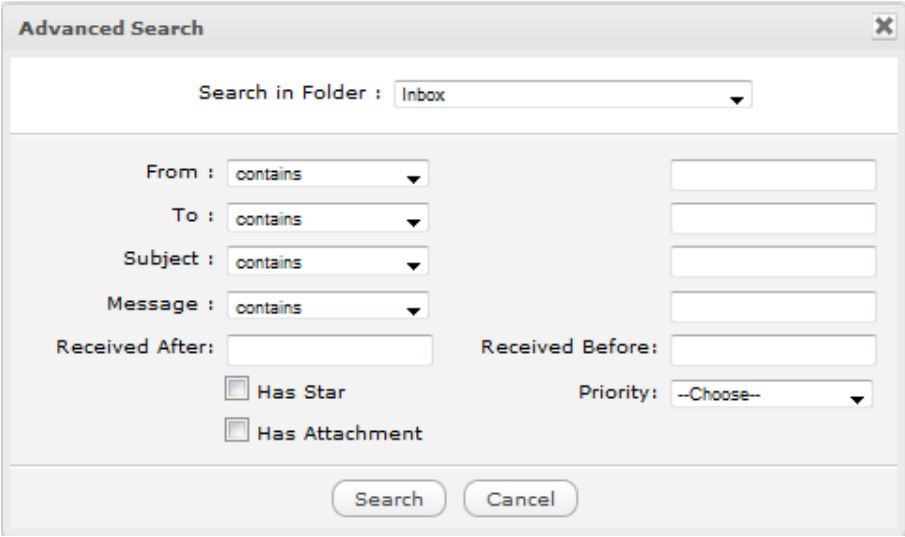
#### Note

By default, the **Quick Search** function of the **Mail** application does not retrieve messages of the **Spam** and **Trash** folders. To do **Quick Search** on these folders, simply select these folders before searching.

#### Advanced search

The Advanced Search allows you to specify criteria to narrow your search results.

1. Click  in the left pane to open the **Advanced Search** form.
2. Define the search conditions to your details, including:



The image shows a screenshot of the 'Advanced Search' dialog box. At the top, there is a 'Search in Folder' dropdown menu set to 'Inbox'. Below this, there are four rows of search criteria, each with a label, a dropdown menu, and a text input field. The labels are 'From:', 'To:', 'Subject:', and 'Message:', all with 'contains' selected in the dropdown. To the right of these are two date fields labeled 'Received After:' and 'Received Before:'. Below these are two checkboxes: 'Has Star' and 'Has Attachment'. At the bottom right is a 'Priority:' dropdown menu set to '--Choose--'. At the bottom center are 'Search' and 'Cancel' buttons.

- **Search in Folder:** The folder in which you want to search in the.
- **From:** The condition corresponding to the sender's name or mail address. There are some further conditions:


Condition	Function
<b>contains</b>	Include the term in the search box.
<b>doesn't contain</b>	Not include the term in the search box.
<b>is</b>	Include exactly the term in the search box.
<b>is not</b>	Not include exactly the term in the search box.
<b>starts with</b>	Start with the term in the search box.
<b>does not start with</b>	Not start with the term in the search box.

- **To:** The condition corresponding to the recipient's name or mail address.
- **Subject:** This condition which corresponds to the message subject.
- **Message:** This condition which corresponds to the message content.
- **Received Before & Received After:** The interval time when the searched messages were receipted.
- **Has Star:** Search for messages with star.
- **Has Attachment:** Search for messages that have the attachment.
- **Priority:** The priority of the search messages.

3. Click **Search** to perform your search.

### 4.3.13. Add an event

If you want to invite your colleagues to join a conference or a meeting, you can create an event, invite them or make email notifications to receive reminders right in the **Mail** application.

1. Click  **New Event** on the **Toolbar** to open the **Add Event** form.
2. Give basic information for your event in the **Event Detail** tab, such as setting the event priority, creating repeating events, attaching files.

The 'Add Event' dialog box is shown with the 'Event Detail' tab selected. It contains the following fields and options:

- Event Summary:** Rock Party \*
- Description:** Annual rock party at Halo Exhibition
- Location:** 12 A 3 Halo Exhibition
- From:** 09/07/2011 18:00
- To:** 09/07/2011 23:45
- All Day:** ☐
- Priority:** None
- Repeat:** No Repeat
- Calendar:** Default
- Event Category:** Music event
- Attachments:** map.JPG-(5.76 MB)

At the bottom are 'Save' and 'Cancel' buttons.

3. Select the **Reminders** tab to create the event reminder via an email. This step is optional.

The 'Add Event' dialog box is shown with the 'Reminders' tab selected. It contains the following fields and options:

- Remind by Email:** ☒
- When the event starts in next:** 5 minutes
- Repeat:** No Repeat
- every:** 5 minutes
- Send reminders to:** David Klein

At the bottom are 'Save' and 'Cancel' buttons.


4. Click **Save** to finish adding your event.

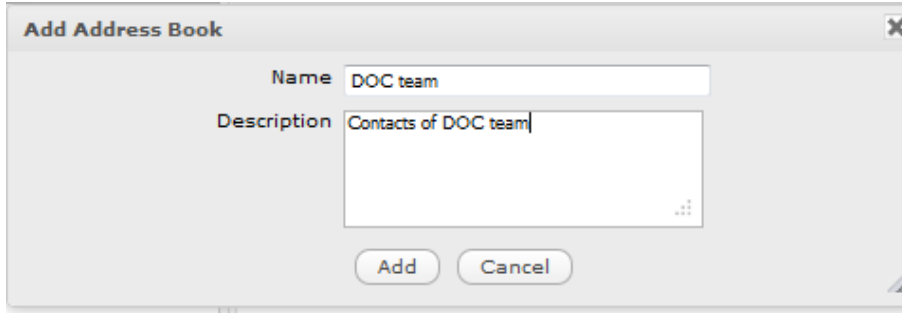
#### 4.3.14. Manage Address Book in Mail

**Address Book** in the **Mail** application provides you with a list of contacts which can be retrieved for sending your mails. This section will explain some actions related to managing contacts and address books in **Mail** via the following topics:

- [Add a new address book \[243\]](#)
- [Add a new contact \[243\]](#)
- [Edit contact details \[244\]](#)
- [Delete a contact \[244\]](#)

### Add a new address book

1. Click  on the **Toolbar** to open the **Contacts** form.
2. Click **Add Address Book** to add a new address book.
3. Enter values in fields of the **Add Address Book** form.



#### Details:

Field	Description
<b>Name</b>	The name of your address book that is required.
<b>Description</b>	The brief description of your address book.

3. Click **Add** to finish adding your address book.

### Add a new contact

The function is used to add a new contact to a group.

1. Open the **Add New Contact** form via the following ways.

#### The first way

Click , then select  on the **Contacts** form.

#### The second way

Right-click a message, then select **Add to Contacts** from the drop-down menu.



#### Note



This way is used to add the message sender to a specific address book.

The **Contact** form will appear.

2. Enter information for your contact. For more details, see the [Create a new contact](#) section.
3. Click **Save** to finish adding your contact.



#### Edit contact details

The function is used to edit a contact in a specific group.

1. Open the **Contacts** form by clicking  **Contacts** on the **Toolbar**.
2. Select the contact whom you want to edit in the left pane.
3. Click .
4. Change the contact details, then click **Save** to finish.

#### Delete a contact

The function is used to delete a contact from a specific group. This contact will be removed from your address book as well.

1. Open the **Contacts** form by clicking  **Contacts** on the **Toolbar**.
2. Select the contact whom you want to delete in the **Address Book** form.
3. Select , then click **OK** in the confirmation message to accept your deletion.




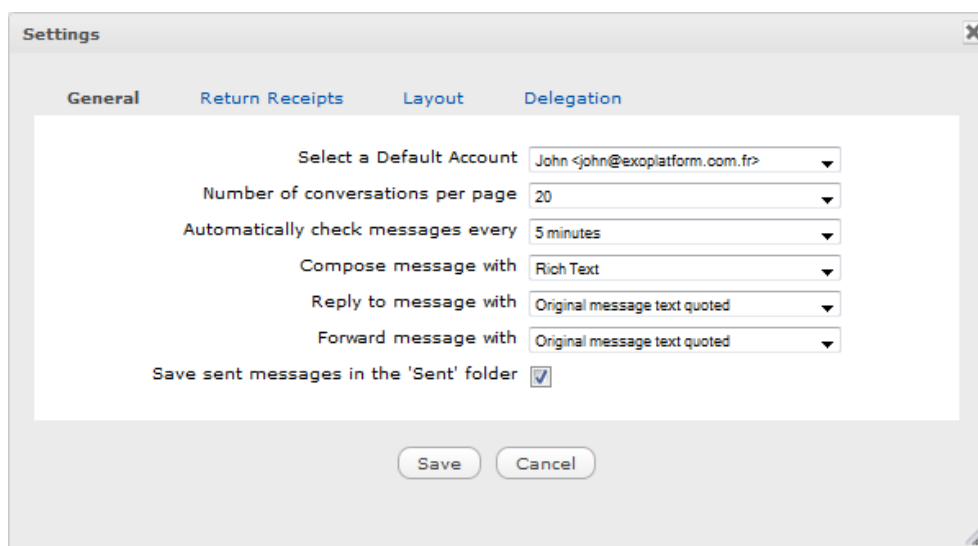
#### Note

You cannot delete your own contact from your address book.

### 4.3.15. Change Mail settings

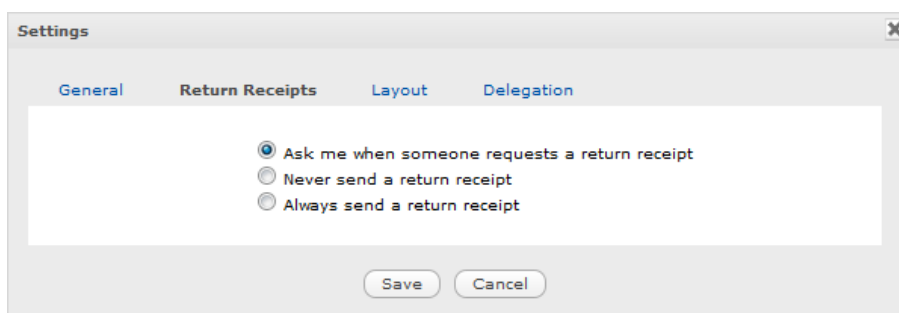
The function allows you to change the behavior and the layout of **Mail** to your needs.

1. Click  **Settings** on the **Toolbar** to open the **Settings** form.
2. Change settings for the **Mail** application in 4 tabs: General, Return Receipts, Layout and Delegation.
  - i. In the **General** tab, change basic information.

**Details:**

Field	Description
<b>Select a Default Account</b>	Set the default account if you use multiple accounts.
<b>Number of conversations per page</b>	Select the number of conversations which will be displayed per page from the list: 10, 20, 30, or 70 messages.
<b>Automatically check messages every</b>	Select the time interval to automatically check the system, including 6 available options: Never, 5 minutes, 10 minutes, 20 minutes, 30 minutes and 1 hour.
<b>Compose message with</b>	Select the editor type for composing messages, including <b>Rich Text</b> and <b>Plain Text</b> .
<b>Reply to message with</b>	Select the message type to reply, including <ul style="list-style-type: none"> <li>- <b>Original message as attachment:</b> Reply to messages with attachments.</li> <li>- <b>Original message text quoted:</b> Reply to messages with text only.</li> </ul>
<b>Forward message with</b>	Select the message type to reply, including <ul style="list-style-type: none"> <li>- <b>Original message as attachment:</b> Forward messages with attachment.</li> <li>- <b>Original message text quoted:</b> Forward messages with text only.</li> </ul>
<b>Save sent messages in the 'Sent' folder</b>	Tick this checkbox to save sent messages in the 'Sent' folder.

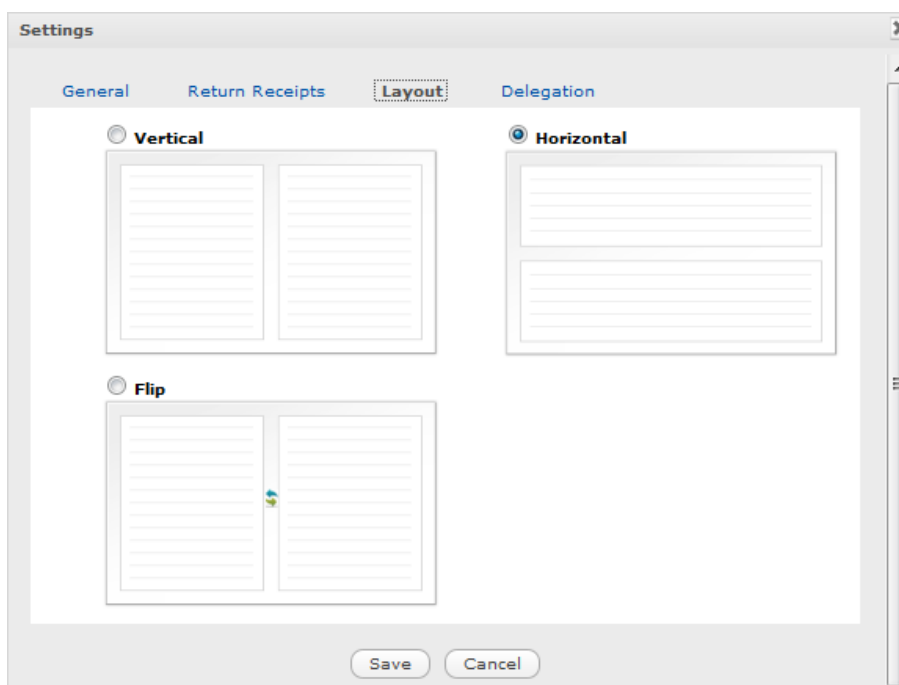
ii. In the **Return Receipts** tab, set options to specify what the **Mail** application should do when it gets a "[Return Receipt \[230\]](#)" request. It means that you can determine whether to send a notification of having read the message to the sender or not.



**Details:**

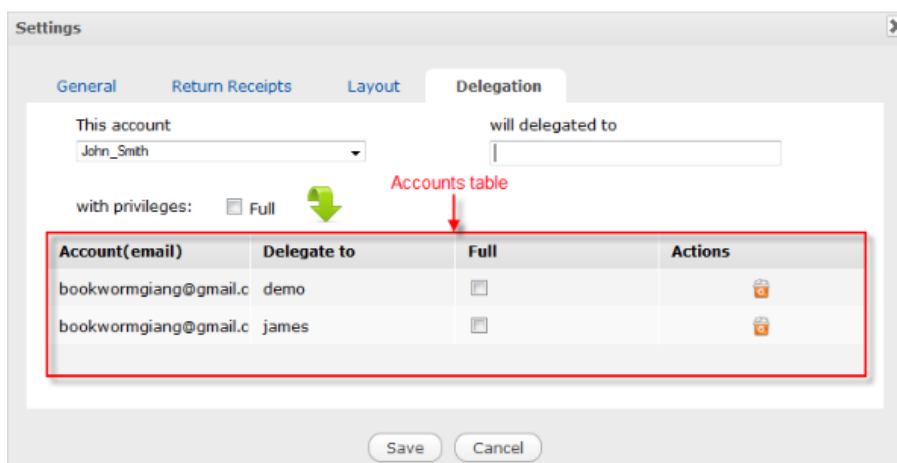
Field	Description
<b>Ask me when someone requests a return receipt</b>	If you receive a message with the <b>Return Receipt</b> request, the <b>Mail</b> application will show a pop-up message for you to decide sending a notification of having read the message to the sender or not.
<b>Never send a return receipt</b>	The <b>Mail</b> application will ignore all <b>Return Receipt</b> requests from senders.
<b>Always send a return receipt</b>	If you receive a message with the <b>Return Receipt</b> request, the <b>Mail</b> application will automatically send a notification of having read the message to the sender without asking for your permission.

iii. In the **Layout** tab, personalize the **Mail** layout by ticking another checkbox corresponding to your desired layout. The **Horizontal Split** type is set by default.



iv. In the **Delegation** tab, delegate your account to any registered user in the system as follows:





- Select the account you want to delegate from the **This account** list by clicking .
- Enter the name of user to whom you want to delegate your selected account in the **will be delegated to** field.
- Tick the **Full** checkbox next to if you want to assign all permissions, which can be done on your selected account, to the delegated user. If this checkbox is not selected, the user can only view mails of the delegated account.
- Click to accept adding your delegated user. The delegated user will be updated in the Accounts table. In this table, you can revoke the **Full** permission or add the **Full** permission to your delegated accounts by unticking or ticking the relevant checkbox respectively in the **Full** column of the Accounts table.

3. Click **Save** to accept your changes.

## 4.4. Chat with your contacts

### • Add contacts to your friend list

Steps to add a contact to your contact list.

### • Remove a contact

Steps to remove a contact from your contact list.

### • Chat with a contact

How to start a conversation with a contact and to perform many related actions, such as setting the online status, sending files, exporting or showing the chat history.

### • Create a chat room

Steps to create a chat room and perform many related actions, including: adding people, joining/leaving a chat room and changing the chat room preferences.

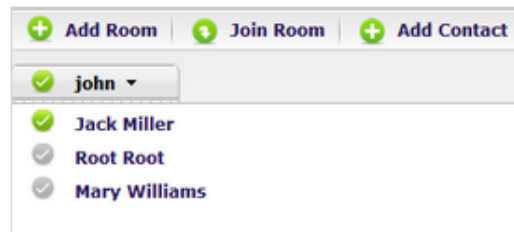


#### Note

Two portlets, including **Chat** and **Chatbar**, and their services are deprecated. They remain fully supported for eXo customers, however they will not receive any enhancement and will be removed from the product scope in the future.

The **Chat** feature is used through the **Chat** or **Chatbar** portlet. The only difference between these portlets is the arrangement of common actions. In particular, actions of the **Chat** portlet are arranged in a window, meanwhile actions of the **Chatbar** portlet are put in one bar. Also, the **Chatbar** holds shortcuts to your **Calendar**, **Contact**, **Mail**.

#### Chat portlet

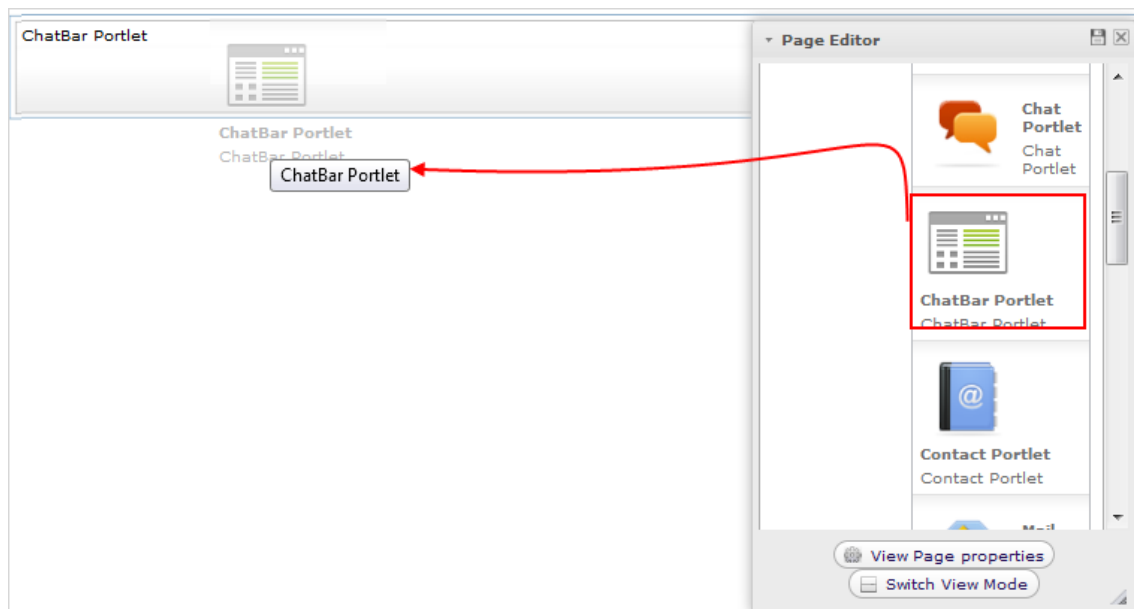



## Chatbar

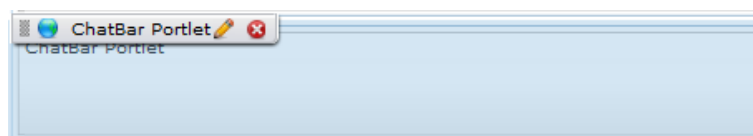


To use the **Chat** feature, you first need to add the Chat portlet or the Chatbar to a specific site or page as follows:

1. Drag and drop the application called **Chat Portlet** or **ChatBar Portlet** from the **Edit Inline Composer/Page Editor --> Applications --> Collaboration** to the body of your selected site/page. You can do this step while [creating a new page](#), or [editing an existing page](#), or [editing the portal layout](#). For example, drag and drop the **Chatbar** portlet as the below illustration.




2. Edit the **Chatbar** portlet by hovering your cursor over it, then clicking .



3. Go to the **Windows Settings** tab and uncheck the following options: **Show Info Bar**, **Show Portlet Mode**, **Show Window State**. By unchecking these options, the portlet border will be hidden. This may help the Chatbar portlet look homogeneous with other components of your site/page.

4. Click **Save And Close** to finish your changes and quit the Edit form of the **ChatBar Portlet**.

5. Click  to save all changes on the page/site and quit the **Edit Inline Composer/Page Editor** form. After that, you will see the **Chatbar** in your site/page.



#### Note

Steps 2, 3 and 4 are optional, but you are recommended to follow these steps.

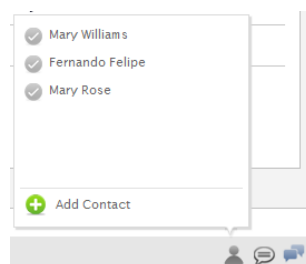
#### See also

- [Manage your calendar](#)
- [Manage your contacts](#)
- [Email your contacts](#)

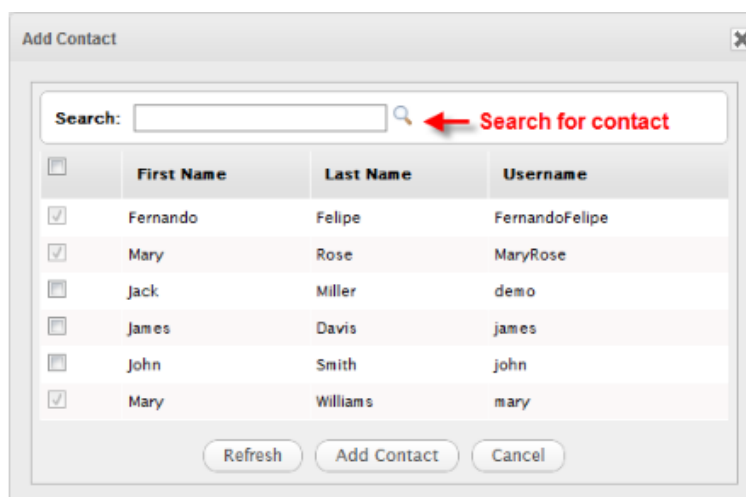
### 4.4.1. Add contacts to your friend list

You can search for contacts in your **Address Book** and add them to your friend list.

1. Click  on the **Chatbar**, then click  **Add Contact** from the pop-up menu.



The **Add Contact** form will appear.



2. Select the contacts from the list by ticking their respective checkboxes.

You can use the **Search** function to search for a specific contact.

3. Click **Add Contact** to add your selected contacts to your friend list.

Your invited contacts will receive the request messages.

After the contacts have accepted your requests, you will receive the confirmation messages. Click **OK** to allow your contacts to see your status and add contacts to your contacts list.

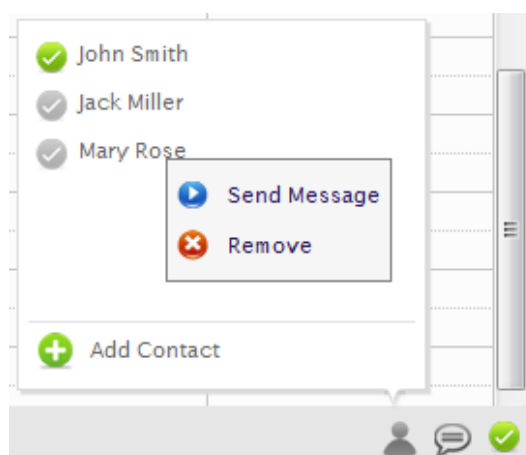
After adding your contacts successfully, the added contacts will be shown in your friend list.

### 4.4.2. Remove a contact

This action is to remove a contact from your friend list.

1. Click  on the Chatbar to show your friend list.

2. Right-click the contact that you want to remove, then select **Remove** from the drop-down menu.



3. Click **OK** in the confirmation message to accept your removal.

### 4.4.3. Chat with a contact

#### 4.4.3.1. Send messages

Sending messages in **Chat** is as simple as typing and clicking, so it is easy for you to start a conversation.

**Send instant messages**

1. Open the **Conversation** window via one of the following ways:

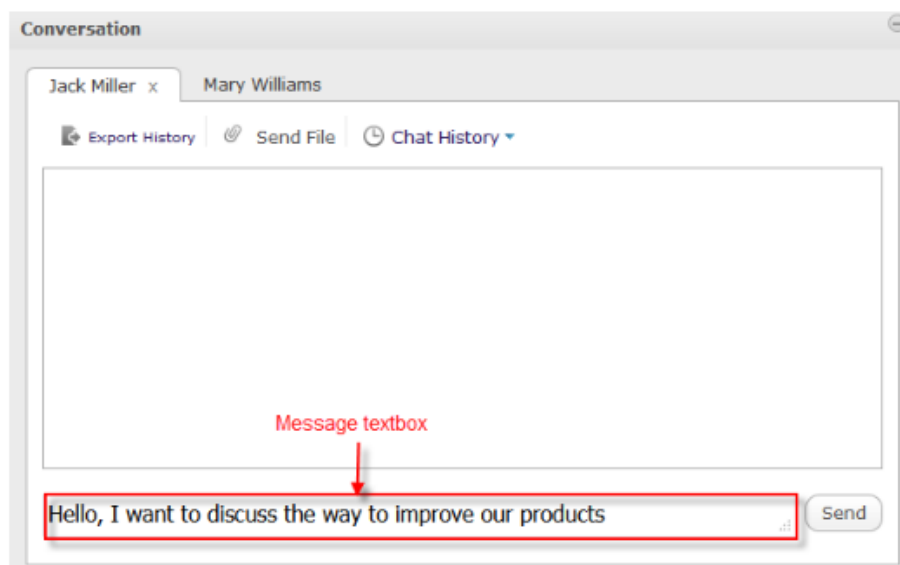
**The first way**

Click the contact name that you want to chat from your friend list.



**The second way**

Click  on the Chatbar to show your friend list, then right-click your desired contact and select **Send Message** from the drop-down menu.

2. Type the message that you want to send into the message textbox, then click the **Send** button or hit the Enter key to send your message.



**Minimize the chat window**

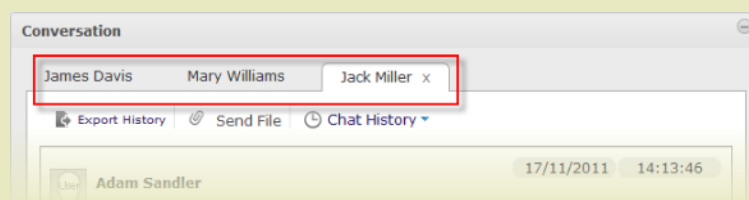
Click  at the right corner of the **Conversation** window to minimize it to the Chatbar. To restore the window, simply click the minimized window () on the Chatbar.




**Note**

When you send a message to offline contacts, they will receive your message at their next logins.

You can chat with several contacts at the same time. Each conversation is displayed in its own tab. You can switch between tabs to follow different ongoing conversations.



### 4.4.3.2. Set your status

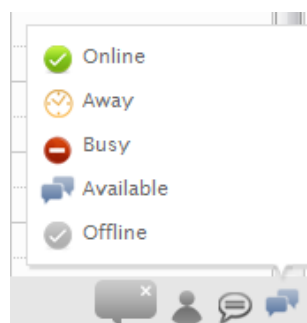
When you signed in **Chat**, by default, your logged-in status is available and your friends will see the online icon  appending to your account name in their friend lists.

There will be a notification about your friend's status if they are available to chat or go offline.








#### Change your status

1. Click the account icon on the **Chatbar**.



2. Select your desired status from the drop-down list.

**Details:**

Icon	Description
 <b>Online</b>	This status means you are available to chat.
 <b>Away</b>	This status means you are away from your local device. Other users still can send instant messages to you.
 <b>Busy</b>	This status means you are away from your local device for an extended period of time.
 <b>Available</b>	This status means you are free to chat with everyone.
 <b>Offline</b>	With this status, you are invisible to other users. This means everyone will see you offline even though you are actually online.

### 4.4.3.3. Send a file

The **Chat** application allows you to send files to your contact, such as holiday pictures, or documents needed for the incoming meeting.

#### Send a file to a contact

1. Click  **Send File** on the **Conversation** window.

You will be prompted to select a file from your local device.

2. Locate and select the file you want to send in the **File Upload** form, then click **Open**.

Your contacts may cancel or accept the file transfer.

#### 4.4.3.4. Export the Chat history

The **Chat** application can archive your chat conversation and allows you to export and save your conversation history to your local device.

1. Click  **Export History** on the **Conversation** window.

You will be prompted to select the location to save the exported file.

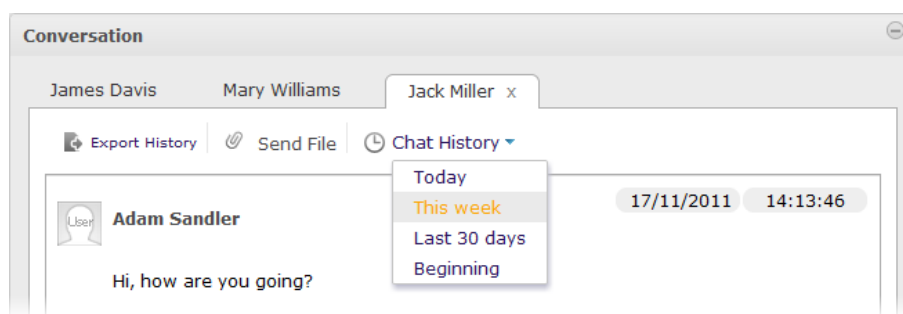
2. Select the location to save the file, then click **Save** to accept the exported file to your local device.

You will have a text file containing all of your conversation messages.

#### 4.4.3.5. Show chat history at a specific time

Your chat messages history can be shown in a specific time interval.

1. Select a contact that you want to show the message log.
2. Select a time interval.



Currently, the **Chat** application shows messages in the following time ranges:

- **Today**: All messages of the current date.
- **This week**: All messages of the current week.
- **Last 30 days**: All messages during the last 30 days.
- **Beginning**: All instant messages from the beginning to the current time.

All messages with the created time and date will be shown in the **Conversation** window.

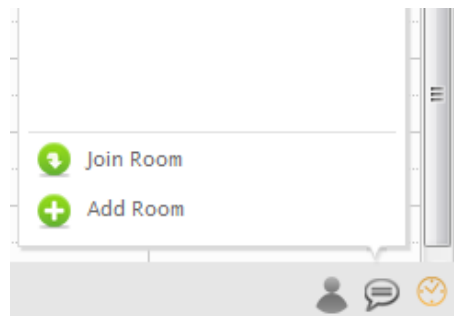
#### 4.4.4. Create a chat room

A chat room is a place where people with similar interests can meet and communicate with each other. People can often enter an unmoderated chat room without any verification of who they are.

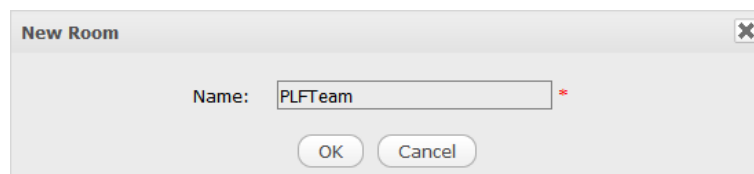
With **Chat**, you also create a chat room and invite other users to join your room. In this way, you can organize and manage your group activities efficiently. It is convenient in the corporate environment when you can communicate in multiple chat rooms, each may have different topics and members. **Chat** supports up to 30 users to join a chat room.

[Create a chat room](#)

1. Click  on the **Chatbar**, then click  **Add Room** from the pop-up menu.



The **New Room** form will appear.

A screenshot of the 'New Room' dialog box. It has a title bar with a close button. Inside, there is a 'Name:' label followed by a text input field containing 'PLFTeam'. To the right of the input field is a red asterisk. Below the input field are two buttons: 'OK' and 'Cancel'.

2. Enter the room name in the **Name** field without any spaces, then click **OK** to accept adding your new room.

After that, the **Conversation** window and **Room Configuration** form appears.

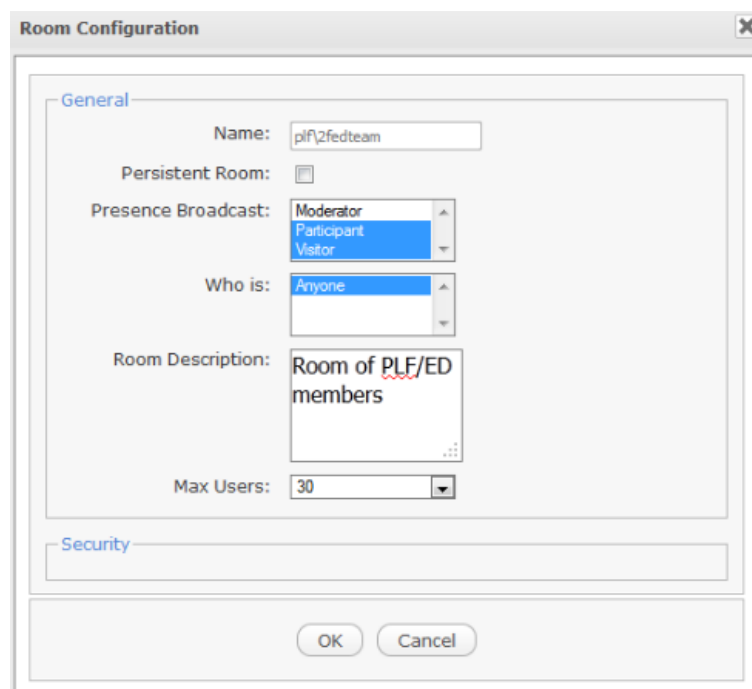
3. Configure your chat room to your desires, including **General** and **Security** settings.



#### Note

If you cancel this step, the default configuration will be used.

- i. Set the **General** settings.

A screenshot of the 'Room Configuration' dialog box. It has a title bar with a close button. The dialog is divided into two sections: 'General' and 'Security'. The 'General' section contains several fields: 'Name' with the value 'plf2fedteam', 'Persistent Room' with an unchecked checkbox, 'Presence Broadcast' with a dropdown menu showing 'Moderator', 'Participant', and 'Visitor' (with 'Moderator' selected), 'Who is' with a dropdown menu showing 'Anyone', 'Room Description' with a text area containing 'Room of PLF/ED members', and 'Max Users' with a dropdown menu showing '30'. The 'Security' section is currently empty. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

**Details:**



Field	Description
<b>Persistent Room</b>	Tick the checkbox if you want to set your room always exist even if no participant takes part.
<b>Presence Broadcast</b>	By default, a room is configured without any invisible members. In this field, you can select any groups (Moderator, Participant, and Visitor) to be visible or not. Moderator is the user who has created the room or a participant who is granted the moderation right. If you want users of one group are hidden in the room, simply unselect the group. For example, if you only select the <b>Participant</b> and <b>Visitor</b> groups, users who are moderators of this room will not appear in the participants list of the chat room. Users of the hidden group only take part as "listeners" who can supervise the whole conversation of this room, although users of other groups do not know their presence.
<b>Who is</b>	Specific users from the selected group in the <b>Presence Broadcast</b> field. At present, there is only the "anyone" option.
<b>Room Description</b>	The brief description of the chat room.
<b>Max Users</b>	The maximum number of participants in the chat room.

ii. Set the **Security** settings.

Click **Show Security** in the **Room Configuration** form to show the **Security** option.

The screenshot shows the 'Room Configuration' dialog box with the 'Security' tab selected. The 'Show General' tab is also visible at the top. The 'Security' section contains the following options:

- Public Room:** ☒ (checked)
- Members Only:** ☐ (unchecked)
- Allow Invitations:** ☐ (unchecked)
- Reserved Nickname:** ☐ (unchecked)
- Password Protected Room:** ☐ (unchecked)
- Moderated Room:** ☐ (unchecked)
- Room Admins:** John Smith (selected in a dropdown list)
- Room Owners:** John Smith (selected in a dropdown list)

At the bottom of the dialog box are 'OK' and 'Cancel' buttons.

**Details:**


Field	Description
<b>Public Room</b>	When this option is checked, your room is listed in the chat rooms list for everyone to see and join this room.

Field	Description
<b>Member Only</b>	Tick this option to limit the number of participants. It means that users need to be invited to participate in the room.
<b>Allow Invitations</b>	This option is only available if the "Member Only" option is checked. If checked, the room's participants can invite others to join chat room.
<b>Reserved Nickname</b>	Tick this option to prevent anonymous users from joining the chat room. If this option is checked, only registered users can enter the room.
<b>Password Protected Room</b>	This option is to change the public room to a locked, secure protected room accessible only to specific individuals with the right password.
<b>Moderated Room</b>	The room is moderated or not. With the moderated room, you can select the room administrators.
<b>Room Admins</b>	This option is to select the administrators for the created chat room. It is only available when the <b>Moderated Room</b> option is selected. At present, there is no difference between the room moderator and regular participants.
<b>Room Owners</b>	This option is to select the room's creator.

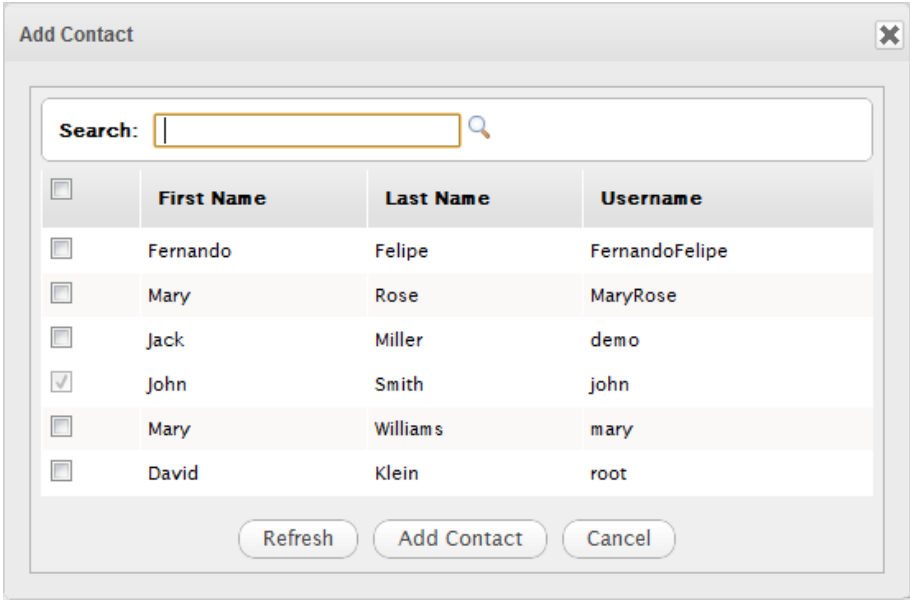
4. Click **OK** to complete the room configuration.

#### 4.4.4.1. Add people to a room

This function is to add people to a chat room where you already participated.

1. Click  **Add** on the chat room conversation window.

The **Add Contact** form will appear:



	First Name	Last Name	Username
<input type="checkbox"/>	Fernando	Felipe	FernandoFelipe
<input type="checkbox"/>	Mary	Rose	MaryRose
<input type="checkbox"/>	Jack	Miller	demo
<input checked="" type="checkbox"/>	John	Smith	john
<input type="checkbox"/>	Mary	Williams	mary
<input type="checkbox"/>	David	Klein	root

2. Select contacts you want to add by ticking their respective checkboxes.

Also, you can search for contacts through your **Address Book** simply entering the search term in the Search textbox. It can be the first name, last name or user name. All contacts matching the search term will be displayed in the results list.

3. Click **Add Contact** to finish. The contacts you want to add will receive your invitation message.

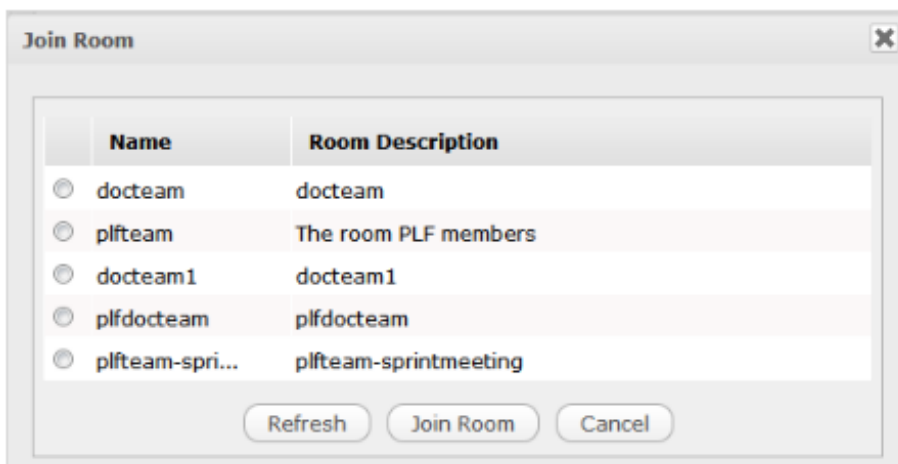
#### 4.4.4.2. Join/Leave a chat room

##### Join a chat room

When joining a chat room, you can learn more about a subject, ask questions and talk with others having common interests. Joining a chat room is just few clicks away.

1. Click  on the Chatbar, then select  from the drop-down menu.

The **Join Room** form will appear.



The **Join Room** dialog box displays a table with two columns: **Name** and **Room Description**. Below the table are three buttons: **Refresh**, **Join Room**, and **Cancel**.

	Name	Room Description
<input type="radio"/>	docteam	docteam
<input type="radio"/>	plfteam	The room PLF members
<input type="radio"/>	docteam1	docteam1
<input type="radio"/>	plfdocteam	plfdocteam
<input type="radio"/>	plfteam-spri...	plfteam-sprintmeeting

2. Select a room in the list by checking the appropriate radio button.

3. Click **Join Room** to join the selected room. Click the **Refresh** button if you want to clear the selected rooms.

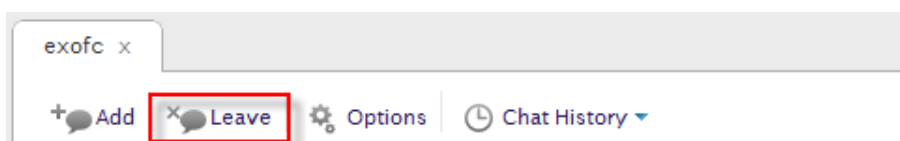


##### Note

You can join several chat rooms at the same time. Each chat room will be displayed in its own tab and you can easily switch between different rooms.

##### Leave a chat room

Click  on the room conversation window.



Your conversation window of this room will be closed and you will not receive messages from the chat room any more.

#### 4.4.4.3. Configure a chat room

When creating a chat room, you are required to configure it before you can start the chat room conversation. However, after the chat room was created, you can also update the room configuration at any time.

1. Click  in the **Conversation** form of the chat room.

2. Set values for the fields in this form. For more details, see [here](#).

**Note**

The chat room configuration is available only if you are the owner or administrator of the chat room. You can change the room owner and select the room administrator in the [Set the Security settings](#) section.

# Organize Your Content

This chapter focuses on how to manage, store, preserve, and deliver content, and more, via the following main topics:

- **Structure content**

Introduction to types of drives and views, functions on action tabs, actions on folders and documents, and content administration.

- **Manage content**

How to contribute content, and to manage content (for example, creating/editing/publishing/deleting content).

- **Manage newsletters**

Information about the newsletter viewer and manager, and actions which can be done on the newsletter manager.

- **Manage workflows**

Introduction to the default processes, including holiday and pay raise, and how to create and manage these processes. Also, this section also focuses on how to upload or view details of a process.

## 5.1. Structure content

- **Access Sites Explorer**

Instructions on how to access **Sites Explorer**.

- **Drives**

Information about private, public, Personal Documents, and group drives.

- **Views**

Introduction to different view modes in **Sites Explorer**.

- **Functions on action tabs**

Introduction to all functions on action tabs of **Sites Explorer** and detailed steps to do them.

- **Actions on folders and documents**

Introduction to all actions on folders and documents and detailed steps to do them.

- **Content Administration**

The way to access the **Content Administration** page where you can manage workspaces, drives, node types, metadata, templates, queries.

**Content** is a main part of a website that may consist of various elements, such as texts, images, sounds, videos, animations, and more. In eXo Platform, you can manage both structured and unstructured content.

To create and manage the content more effectively and dynamically, you need to pay attention to the structure of each content, including:

- **Main content** contains all key content, such as texts, images, links, tables, and more.
- **Illustration** is an image which is used to clarify or explain the content. Also, a summary also can be added to this image.


- **default.css** contains CSS data which are used to present the web content, such as layout, font, color, and more.
- **default.js** contains JS data which are used to make web content more animating and dynamic.

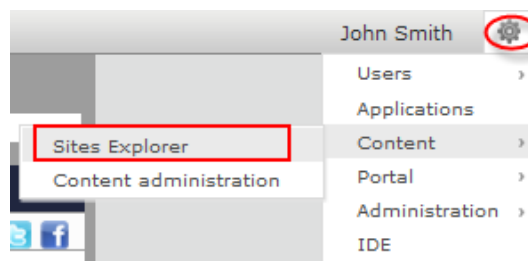
#### See also

- [Manage content](#)
- [Manage newsletter](#)
- [Manage workflows](#)

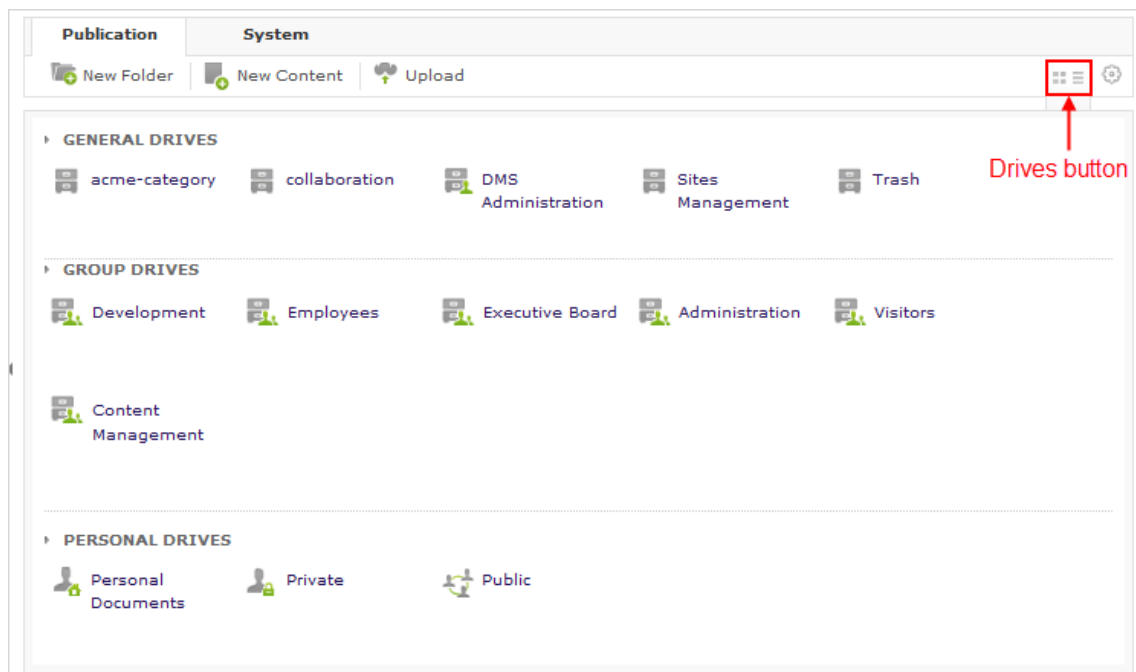
### 5.1.1. Access Sites Explorer

This page is used to manage all documents in different drives. This is really a flexible way because you can do through Internet whenever and wherever. By default, anyone can access **Sites Explorer**, but the ability to do actions on **Sites Explorer** depends on the role of each user.

- Hover your cursor over  on the **Administration** bar, then select **Content --> Sites Explorer** from the drop-down menu.



A list of all drives organized in groups (**Personal** drives, **Group** drives and **General** drives) in the **Sites Explorer** are displayed.



#### Personal drives

This is the working space of a user. If you want to do in private, select the **Private** drive, no one else can access or get your private resources. If you want to create resources and share them with others, work in the **Public** drive.

#### Group drives

The working space of users of a specific group.

In the following example, the user "root" joins in three groups: "executive-board", "administrators" and "users" so he has the right to access these groups' drives.

### General drives

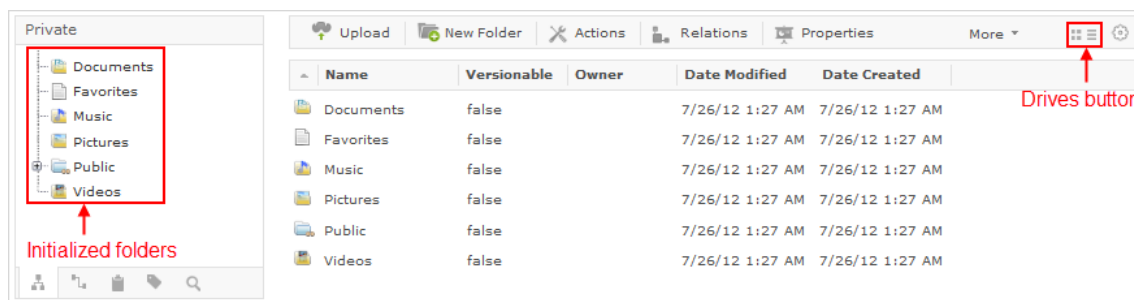
This is the working space for everyone but your access right in different drives depends on your role. If you access as an administrator role, you can see all drives; otherwise, you can see some drives only as a web contributor role.

## 5.1.2. Drives

Drive is a shortcut to a specific location in the content repository that enables administrators to limit visibility of each workspace for groups of users. It is also a simple way to hide the complexity of the content storage by showing only the structure that is helpful for business users. For information about how to manage drives, you can read the [Manage drives](#) section.

### 5.1.2.1. Private drive

The **Private** drive contains personal data of registered users. Hence, only these individuals can access data in this drive type.



By default, there are some initialized folders to store private resources of users.

In **Private** drive, there are many functions on the **Action** bar, including:

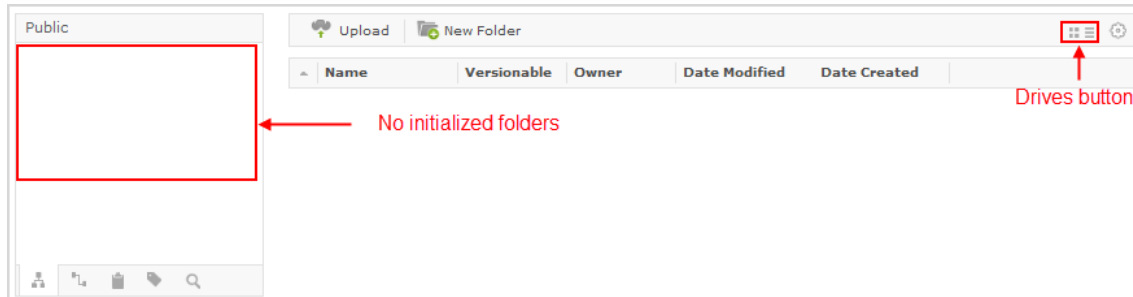
- Create new folders/documents.
- Upload files from your computer.
- Add Symlinks.
- Overload Thumbnails.
- Watch/Unwatch documents.
- Add tags to a document.
- Set multiple languages for a document.
- Vote for a document.
- Comment on a document.
- By selecting the Search tab, you can:
  - Do the simple search.
  - Do the advanced search with more constraints, or by adding new queries to search.
  - Do search by existing queries.
- In addition, you can:
  - Set up your browse preferences.
  - Cut/Copy/Paste/Delete nodes.
  - Lock nodes.
  - Rename nodes.
  - View document content by the WebDAV function.

- Download documents (folders) to your machine.

### 5.1.2.2. Public drive

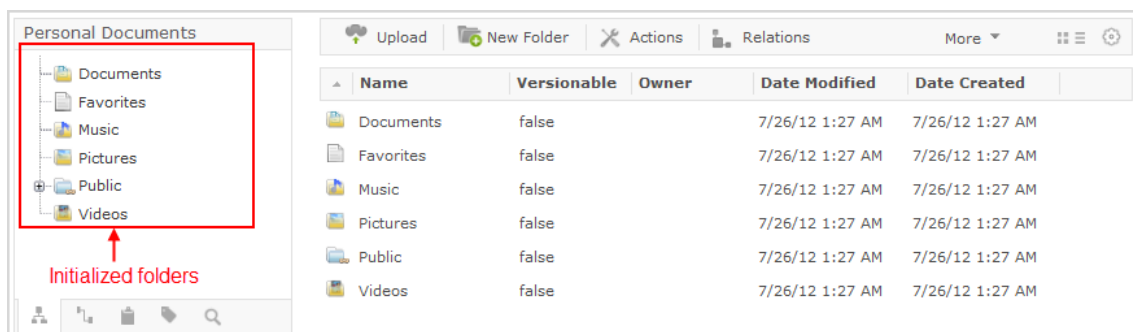
With the **Public** drive, there is no initialized folder but you can create by yourself.

In the **Public** drive, you also can take similar actions to those in the **Private** drive.



### 5.1.2.3. Personal Documents drive

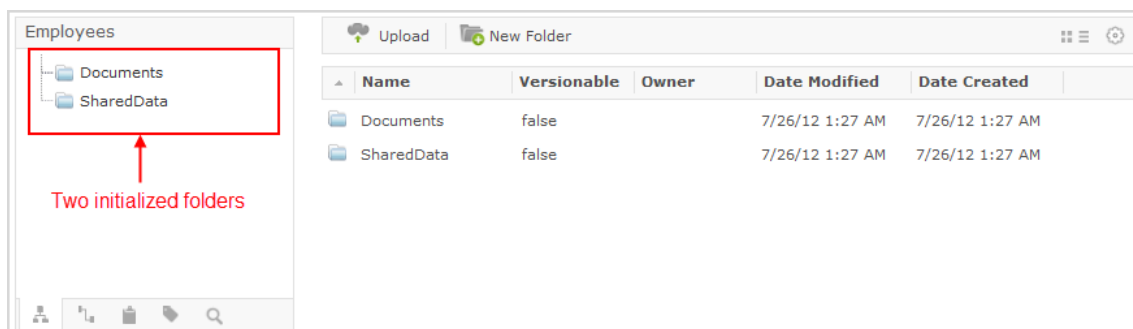
This drive consists of some initialized folders as the **Private** drive.



In the **Personal Documents** drive, you also can take similar actions to those in the **Private** drive.

### 5.1.2.4. Drive of a specific group

By default, there are two initialized folders but you also can add more and take actions that is similar in the **Private** drives. Only users in a specific group can access its drive.



#### Note

Drives which are created during [space creation](#) are visible and accessible by their members only.

The space drives only can be deleted when the spaces are deleted by the space manager.




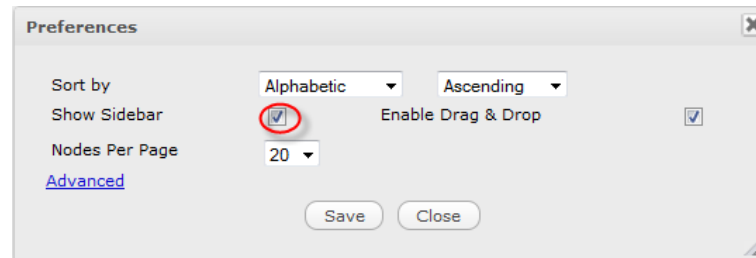
### 5.1.2.5. Hide/Show the sidebar in a drive

The sidebar is used to show nodes like a tree or show the related documents, tags, clipboard and saved searches.

You can hide/show the sidebar in two ways:

#### The first way


1. Click  to open the **Preferences**.

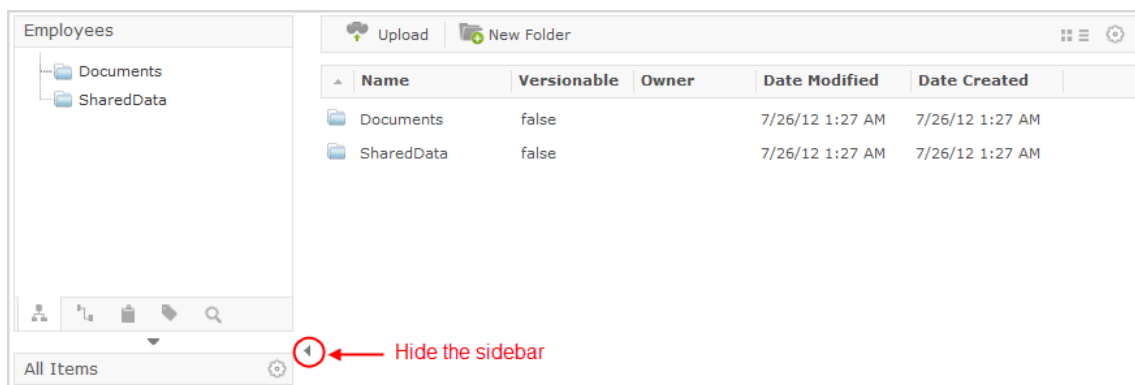


2. Deselect the **Show sidebar** checkbox, then click **Save** to accept your changes.

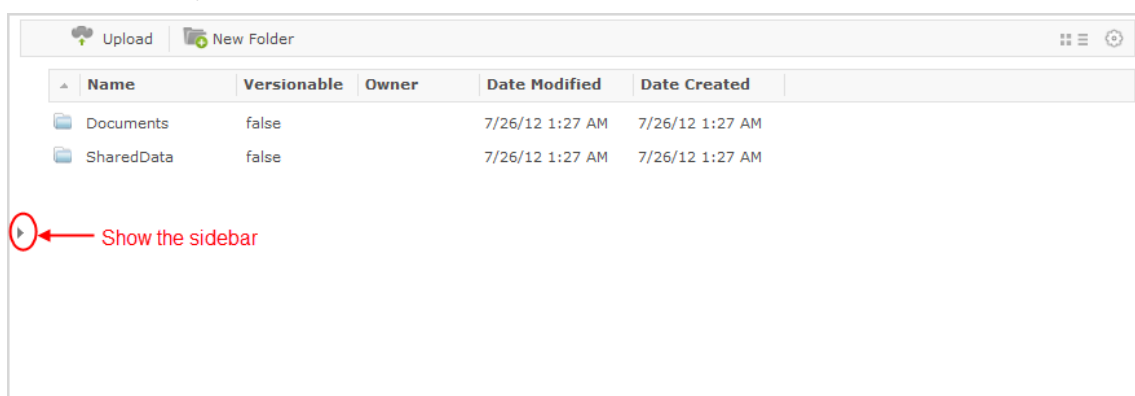
- To show the sidebar, tick the **Show Sidebar** checkbox in the **Preferences** form.

#### The second way

- Simply click  to hide the sidebar as the illustration below.



The drive will be displayed like the illustration below.



- Click  to show the sidebar.


### 5.1.3. Views

There are many drives in **Sites Explorer**. Each drive has some views that enable you to view data in the drive in a particular way. Each view has some action tabs and each action tab contains some functions.

eXo Platform supports you some ways to view nodes in a specific folder and show actions of corresponding tab on the **Action bar**.

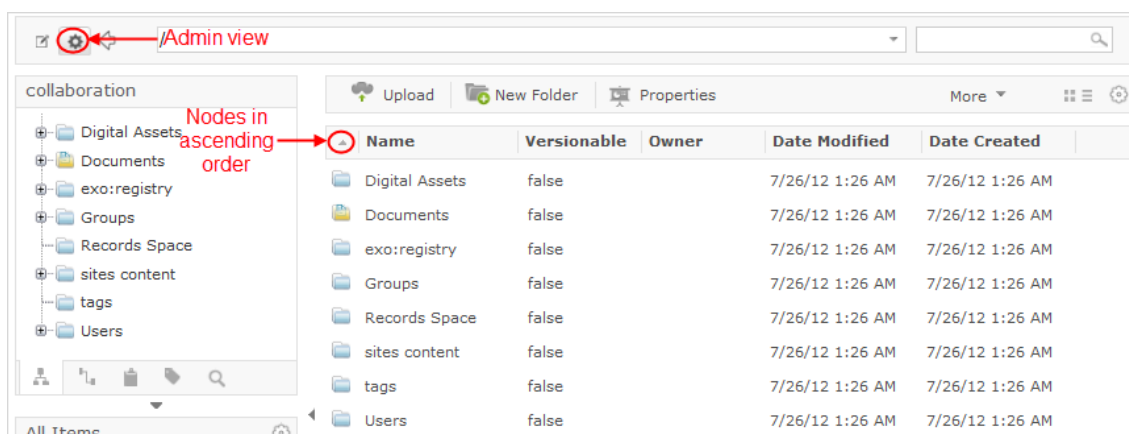


### Note

The number of view types depends on which drive you are browsing. In eXo Platform, you can manage view types by selecting  --> **Content** --> **Content Administration** --> **Content Presentation** --> **Manage View**. See the [Manage views](#) section for more details.

### 5.1.3.1. Admin view

In this view, each item in the list includes following information: **Name**, **Versionable**, **Owner**, **Date Modified**, and **Date Created**. These information will help you manage nodes easily.

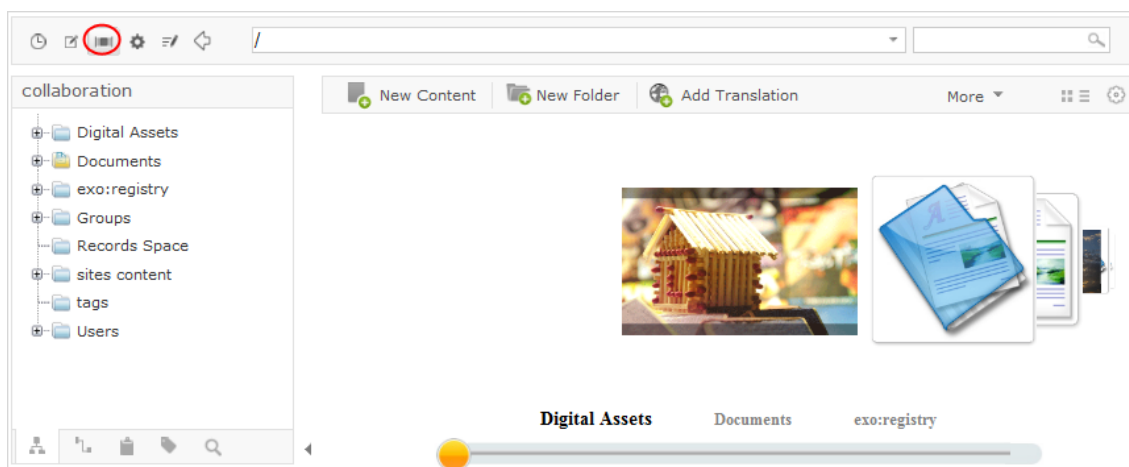


You also can sort nodes to the nodes information by clicking the label of corresponding column.

- ▲ indicates that nodes are ordered in the ascending order.
- ▼ means nodes are in the descending order.

### 5.1.3.2. Cover Flow view

This view is defined as a dynamic one with the side-scrolling view to nodes in a folder. In this view, when a node is selected, its name is set with bold effect to more outstanding than others.



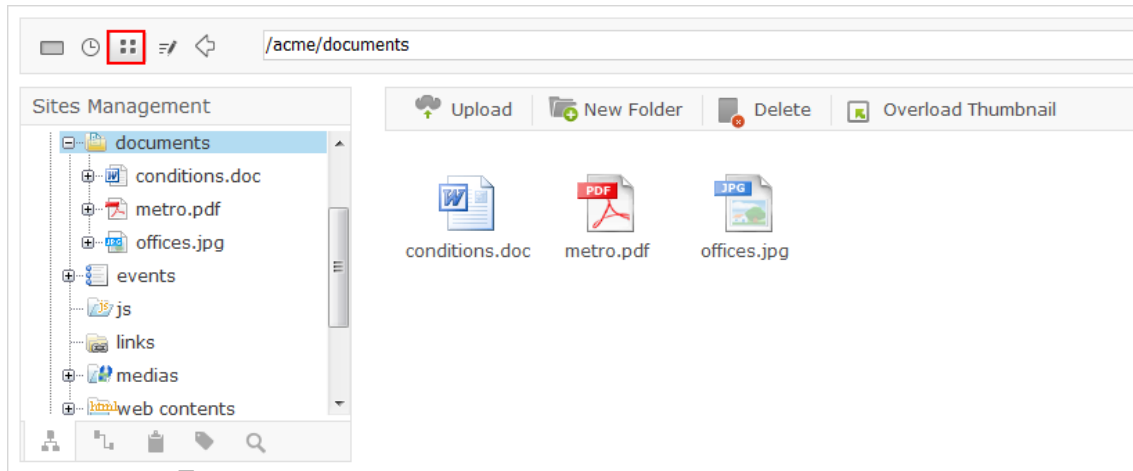
To move from one node to another one, you can do one of these ways:

- Use the mouse wheel.
- Hold and move the yellow circle button to the left or the right.

- Click the folder/document name that you want to select.

### 5.1.3.3. Icons view

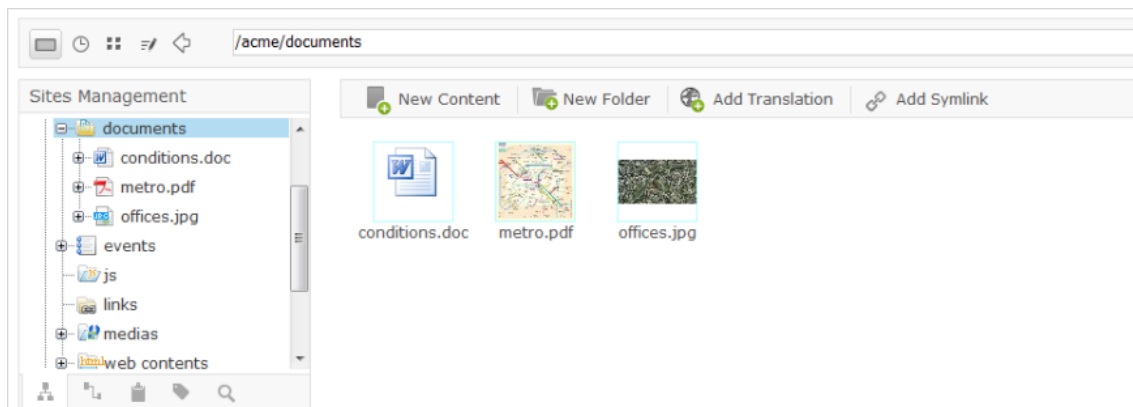
In this view type, nodes in a specific folder will be viewed as icons. The name of each node will be shown under its icon.



### 5.1.3.4. Thumbnails view


By using the **Thumbnails** view, nodes in a specific folder are viewed as icons bounded by frames. Name of each node is shown under its icon.

If nodes are image files, their thumbnails will be shown like the screenshot below.



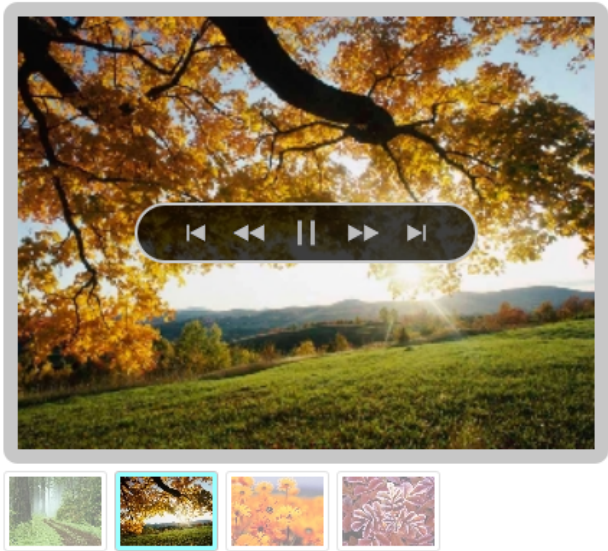
### 5.1.3.5. Slide Show view

In this view type, pictures in folders are viewed in the slide show.

To view pictures in the slide show, click .




If nodes are pictures, they are displayed like the following illustration.



The **Slide Show** view automatically shows all picture nodes. Users can control this slide show by clicking the below buttons.

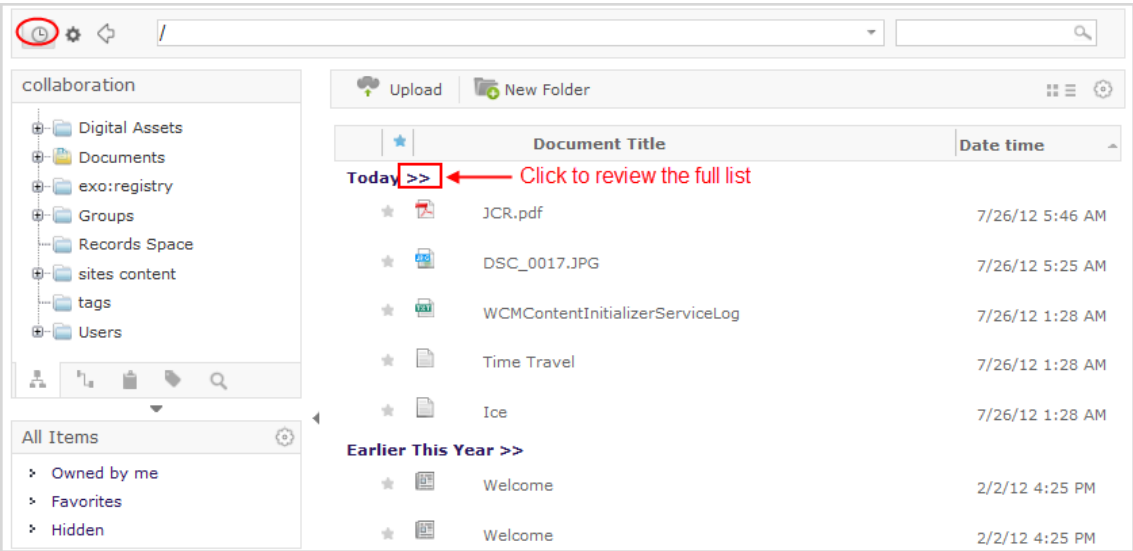
Button	Function
	Go to the first picture node.
	View the previous picture node.
	Pause the slide show. After clicking this button,  will become  . Click  to continue viewing the pictures node.
	View the next picture node.
	View the last picture node.



5.1.3.6. Timeline view

This view enables users to view all document nodes created and uploaded by simply clicking .



All the document nodes, which have been created and uploaded, will be displayed.



- Click the node name to view its content in details.
- Click a timeline category, such as **Today**, **Yesterday**, **Earlier This Week**, **Earlier This Month**, and **Earlier This Year** to review all the nodes of the category. Click it again to return to the default.
- Click  to mark your item as favorite, or  of a favorite node again to remove it from favorites.

### 5.1.4. Functions on action tabs




#### Note

Functions are added to tabs in **Sites Explorer** by administrators. The number of displayed actions depends on each tab and each drive you are browsing and your role.

#### 5.1.4.1. Add a category


























































This function enables you to add a category to a node.

1. Select a node to which you want to add a category.
2. Select  **Add Category** on the **Action** bar to open the **Add Category** form.
3. Enter a name for the category in the **Category Name** field.
4. Click **Save** to accept creating the new category.

#### 5.1.4.2. Add a document

There are several types of document in eXo Platform, such as **File**, **Article**, **Podcast**, **Sample node**, **File Plan**, **Kofax**, and more.

The table below shows types of nodes which can be added to various document types. The rows indicate which nodes in the left column can be added. The columns indicate which nodes at the top can contain.

	File	Article	Podcast	Sample node	File Plan	Kofax document	Content folder	Document folder
File								
Article								
Podcast								
Sample node								
File Plan								
Kofax								
Uploaded file								
Content folder								
Document folder								


**Note**

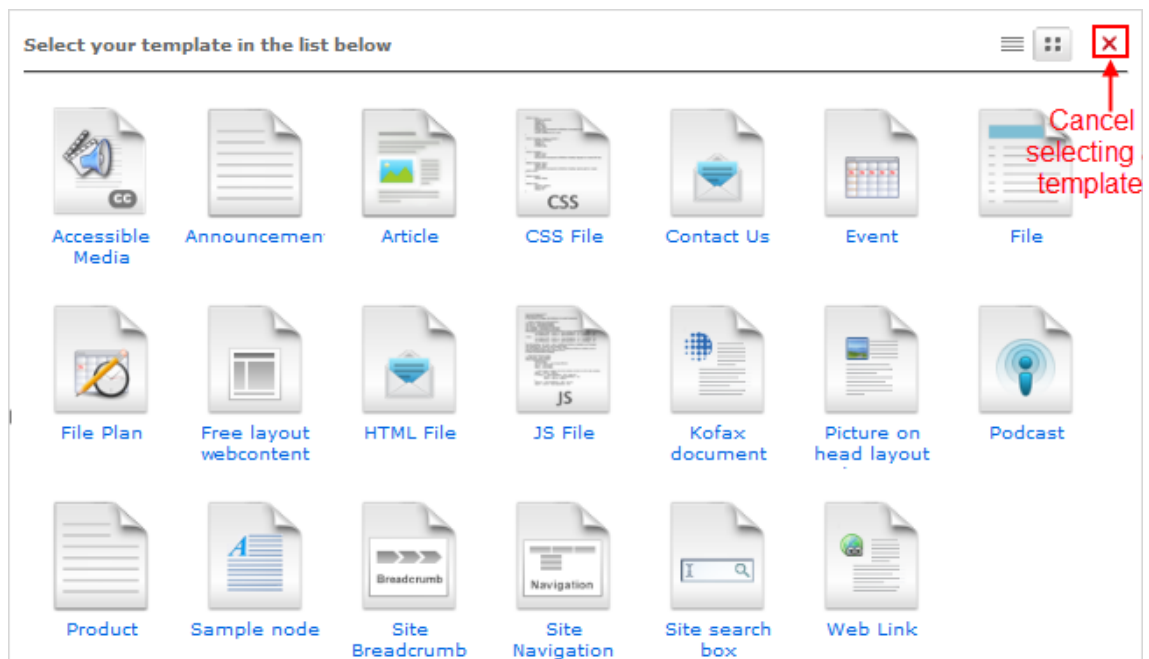
indicates that the corresponding document can be added into. A blank entry means that the corresponding document cannot be added into.

Following the horizontal, you will know which nodes can be added.

Following the vertical, you will know which node can be included.


**Add a new document**


1. Select a folder from the left pane where you want to add a new document.
2. Click  **New Content** on the **Action** bar to open a list of content templates.



3. Click your desired template. See more details in [Step 3 \[345\]](#) of the [Add content](#) section.  
Each document (except Article) must be added to categories when being created.

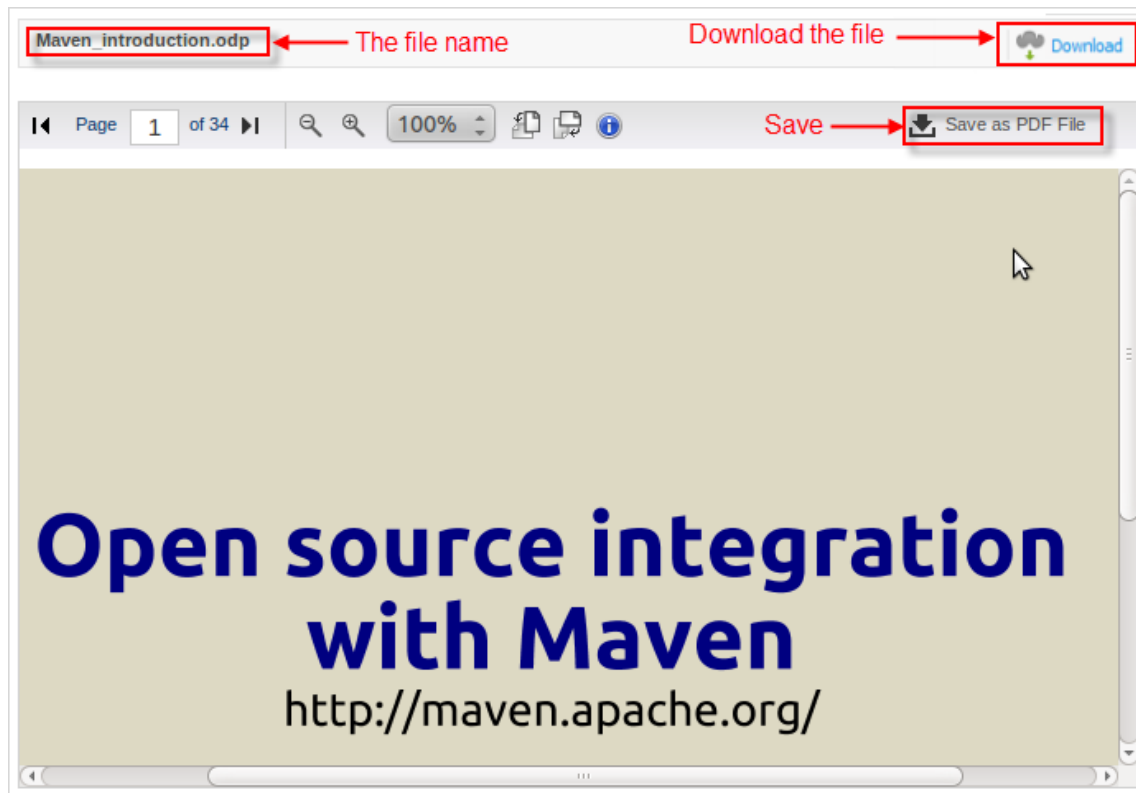
**Attach files to a document**

1. Select a document or a folder that you want to attach files, and click  **Upload** on the **Action** bar.  
The **Upload File** form will appear.

2. Enter a name into the **Name** field. If not, the **Name** field is automatically filled with the file name.
3. Click **Browse...** to select the attachment file. You can click  to add more files.

- Click **Save** to attach the files.


To view the attached file directly in **Sites Explorer**, simply click its name.



#### Note

eXo Platform enables you to view all types of documents, such as Open Office, Microsoft Office in the PDF format.

### Create a new File document

- Follow the steps in the [Add a new document \[268\]](#) section to open the corresponding form to add a **File** document.
- Input a name for the file document in the **Name** field. Some special characters (@ # % & \* ( ) " ' ; [ ] { } / !) cannot be used in the **Name** field.
- Click the **Mime Type** field and select one type. There are three types of **File** document:
  - text/html**: when creating a text/html File document, you can input values like source code (HyperText Markup Language HTML) in the **Content** field. After being created, it will generate the content you want, then you can see both the input source code and the generated content in that document.
  - text/plain**: after a text/plain File document is created, it will display exactly what you input in the **Content** field.
  - application/x-groovy+html**: it indicates your file as a groovy file.
- Input a value in the **Content** field:
  - text/html** or **application/x-groovy+html**: if you want to create a **File** document with a source code and generated content, click the  **Source** button in the **Editor** bar.
  - text/plain**: if you select text/plain type, the content field will be displayed like the following illustration.

Form fields for creating a new file document:

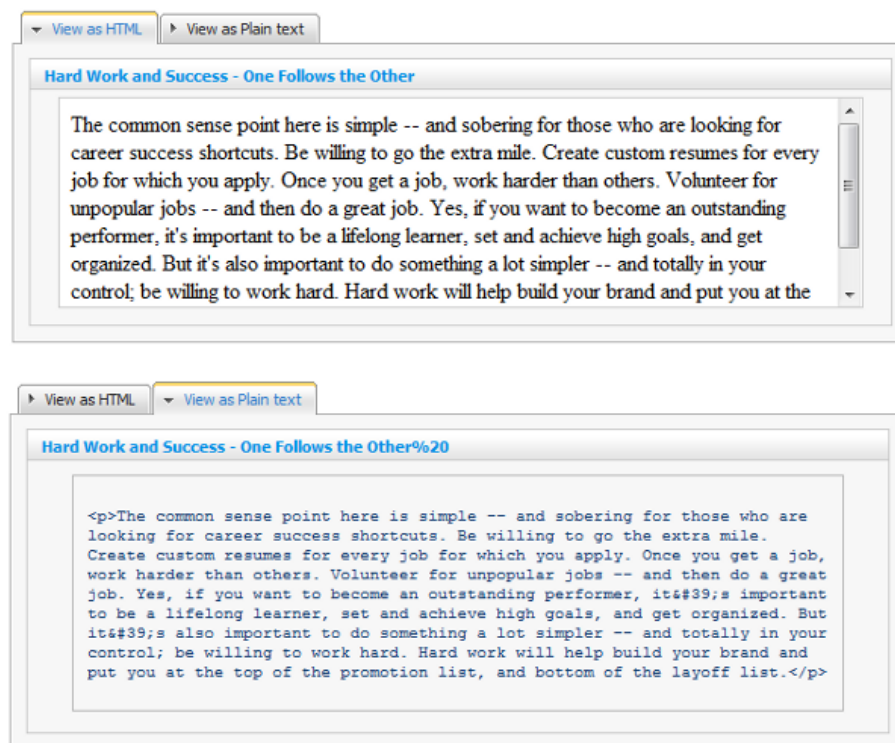
- Name:
- Categories:  +
- Mime Type:
- Language:
- Content:
- Title:  +
- Description:  +
- Creator:  +
- Source:  +

- Optionally, fill values in all the rest fields, including **Title**, **Description**, **Creator** and **Source**.

Click + to open more fields.

- Click **Save** or **Save & Close** to accept creating a new file document.

After being created successfully, a file document with the `text/html` type will be displayed like the illustration below.

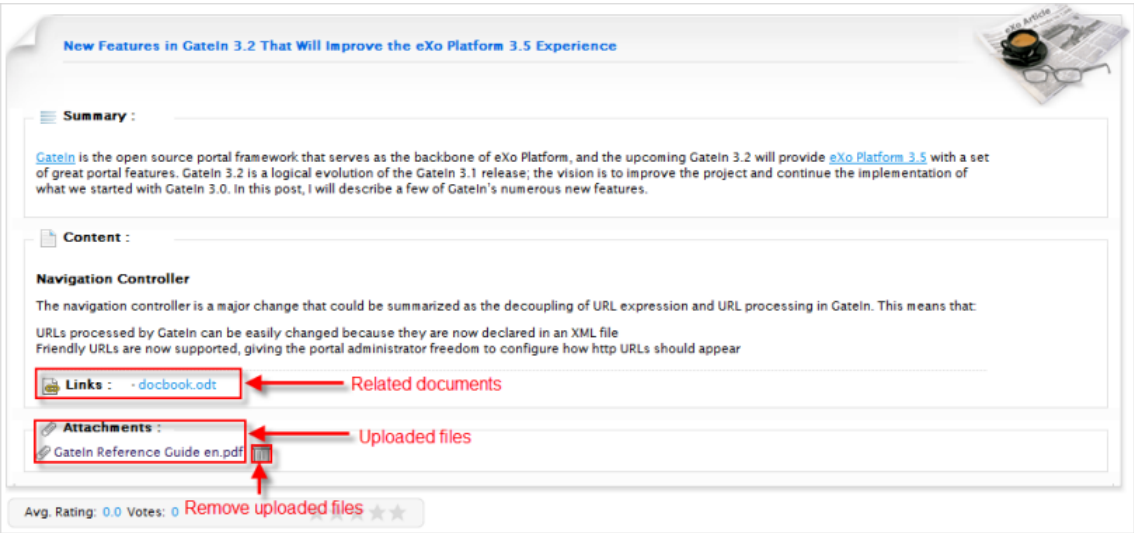


### Create a new article


- Follow the steps in the [Add a new document \[268\]](#) section to open the corresponding form to add a new Article document.
- Input name and title of the Article in the **Name** and **Title** fields. Special characters (@ # % & \* ( ) ' ' ; [ ] { } / !) are not allowed in the **Name** field.
- Input values for both fields: **Summary** and **Content**.
- Click **Save** or **Save & Close** to accept the inputted values.

After being created, your newly added Article document will be shown as below.





The **Links** area lists all its related documents. After adding relations to a document, Article will be displayed. You can click these links to view the content of the related documents. For more details about how to add a relation to a document, refer to the [Add a relation \[291\]](#) section.

The **Attachments** area lists all its uploaded files/documents which are attached with the Article. You can remove the attachments by clicking .

For more details about how to add an attachment, see the [Attach files to a document \[268\]](#) section.



**Note**

The name of document may be as the same to that of the existing one. When a new document is created with the same name as other existing document, a numeric index will be added to the name (for example, test [2]).

**Create a new Podcast**

1. Follow the steps in the [Add a new document \[268\]](#) section to open the corresponding **Podcast** form.

Name	<input type="text"/>
Categories	<input type="text"/>
Title	<input type="text"/>
Link	<input type="text"/>
Author	<input type="text"/>
Explicit	<input type="text" value="No"/>
Category	<input type="text"/>
Keyword	<input type="text"/>
Publish Date	<input type="text"/>
Language	<input type="text" value="en"/>
Description	<div></div>
Upload File	<input type="text"/> <input type="button" value="Browse..."/>
Mime Type	<input type="text" value="audio/mp3"/>
Length	<input type="text"/>

**Details:**

Field	Description
Name	

Field	Description
	The document name which is required. Special characters (@ # % & * ( ) " ' : ; [ ] { } / !) are not allowed in the <b>Name</b> field.
<b>Categories</b>	Categories of a document.
<b>Title</b>	The display name of a document.
<b>Link</b>	The link to the source path of the uploaded media file that is required.
<b>Author</b>	The author of the uploaded media file.
<b>Explicit</b>	It is used to indicate if your Podcast episodes contain an explicit content or not.
<b>Category</b>	The category of the uploaded media file, for example music, film, or short clip.
<b>Keyword</b>	This field allows you to search your Podcast files more quickly. You can use commas to separate between keywords.
<b>Publish Date</b>	The date when an episode was released.
<b>Description</b>	Information about the uploaded media file.
<b>Mime Type</b>	The type of the uploaded media file.
<b>Length</b>	The length of the uploaded media file.

- Input values for fields. To upload a media file, click **Browse...** and select the media file from your device.
- Click **Save** or **Save & Close** to finish.

Once being created, a Podcast will be displayed.


<b>Podcast:</b>	Proud of you
<b>Title:</b>	Proud of you
<b>Link:</b>	youtube.com
<b>Author:</b>	
<b>Explicit:</b>	no
<b>Category:</b>	
<b>Keywords:</b>	Proud, love
<b>Publish Date:</b>	November 28 2011
<b>Mime Type:</b>	audio/mp3
<b>Length:</b>	
<b>Description:</b>	My favorite song :)
	★★★★★
	Avg. Rating: 0.0 Votes: 0

### Create a new Sample node

- Follow the steps in the [Add a new document \[268\]](#) section to open the **Sample node** form.
- Complete the appropriate fields.
- Click **Browse...** to locate your desired image, and upload it.

- Click **Save** or **Save & Close** to finish.

After being created, a new sample node will be displayed.

<b>Node Name</b>	mau-son-mountain
<b>Title</b>	Mau Son mountain
<b>Date</b>	July 26 2012
<b>Date Time</b>	July 26 2012 06:20:03
<b>Description</b>	One of the best sight-seeings in Vietnam
<b>Image</b>	
<b>Summary</b>	The fresh and peaceful atmosphere
<b>Content</b>	It is a very good place to relax with your family and friends :)
<b>Relations</b>	
<b>Attachments</b>	

The **Relations** area is used to list all its related documents. See the [View a relation \[292\]](#) section.

You can click the links to view content of the related document.

The **Attachments** area is used to list all its uploaded files. See the [Attach files to a document \[268\]](#) section for more details.

### Create a new File Plan


- Follow the instructions in the [Add a new document \[268\]](#) section to open the corresponding form to add a **File Plan** document.

Name	Record Properties	Process Properties
Name	<input type="text"/>	*
Categories	<input type="text"/>	+
Language	en	▼
File Plan Note	<div></div>	

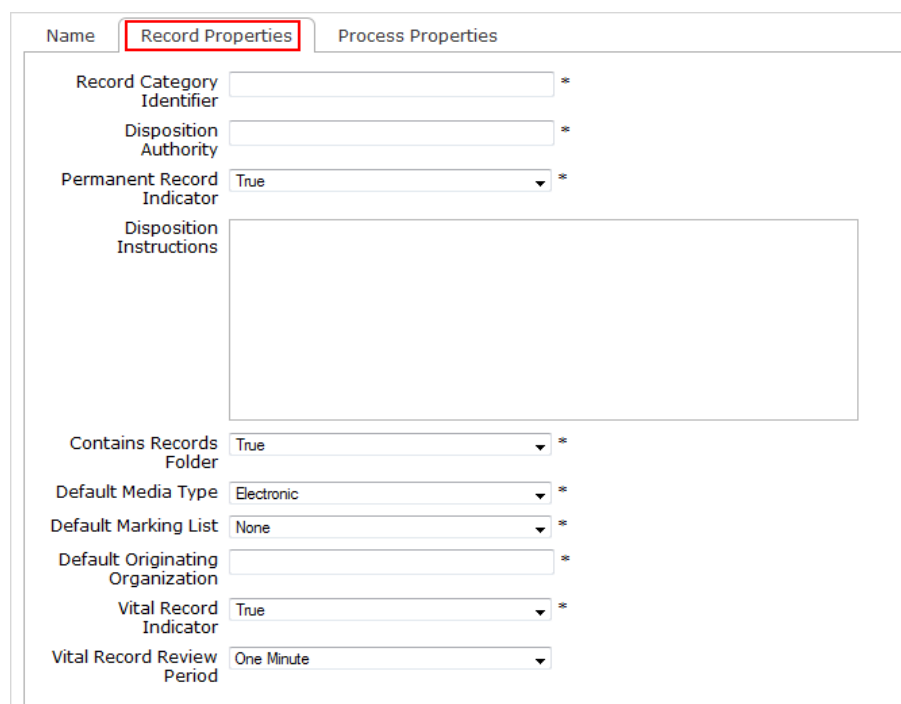
#### Details:

- The **Name** tab

Field	Description
<b>Name</b>	The name of the file plan.
<b>Categories</b>	

Field	Description
	Categories of your file plan. Select the categories for your file plan by clicking  .
<b>Language</b>	The language of the File Plan document.
<b>File Plan Note</b>	Note for presenting any other information for users.

- The Record Properties tab



The screenshot shows the 'Record Properties' tab selected. The form includes the following fields:

- Record Category Identifier**: Text input field with an asterisk.
- Disposition Authority**: Text input field with an asterisk.
- Permanent Record Indicator**: Dropdown menu with 'True' selected and an asterisk.
- Disposition Instructions**: Large text area.
- Contains Records Folder**: Dropdown menu with 'True' selected and an asterisk.
- Default Media Type**: Dropdown menu with 'Electronic' selected and an asterisk.
- Default Marking List**: Dropdown menu with 'None' selected and an asterisk.
- Default Originating Organization**: Text input field with an asterisk.
- Vital Record Indicator**: Dropdown menu with 'True' selected and an asterisk.
- Vital Record Review Period**: Dropdown menu with 'One Minute' selected.

Field	Description
<b>Record Category Identifier</b>	The alphanumeric identifier indicates a unique record category. This must be a unique ID. If this field is left blank, it will be created automatically by the system.
<b>Disposition Authority</b>	A reference number to the regulations that govern the disposition.
<b>Permanent Record Indicator</b>	A type of record indicators which should never be deleted.
<b>Disposition Instructions</b>	A readable guideline on how to handle the records associated with the file plan.
<b>Contains Records Folder</b>	The confirmation is about whether the records folder is contained or not.
<b>Default Media Type</b>	The choice for preset media types which are made available to simplify the data entry for the record. The frequently-chosen value is "electronic" or paper.
<b>Default Marking List</b>	Handling and classifying information that is printed at the bottom of the record, such as UNCLASSIFIED, or NOCONTRACT.
<b>Default Originating Organization</b>	This option is to enter the original arrangement as default which is made available to simplify the data

Field	Description
	entry for the record and to assume that originating organizations are the same for the information in the file plan.
<b>Vital Record Indicator</b>	This flag is to allow tracking or reminding you of the record as essential or not.
<b>Vital Record Review Period</b>	The choice for the interval of time between vital record reviews.

- The Process Properties tab

Name
Record Properties
Process Properties

Process Cutoffs

True

\*

Event Trigger

\*

Cutoff Period

One Minute

Cutoff on Obsolete

True

Cutoff on Superseded

True

Process Hold

True

\*

Hold Period

One Minute

Discretionary Hold

True

Process Transfer

True

\*

Default Transfer Location

Transfer Block Size

Process Access

True

\*

Access Location

Access Block Size

Process Destruction

True

\*


Field	Description
<b>Process Cutoffs</b>	The Boolean data type is used to break a process. If the process cutoff flag is set in the file plan, the record is cutoff after the expiration, or after it has been obsolete or superseded, depending on the information in the file plan.
<b>Event Trigger</b>	The text data type is an automatic executing code which is used to tell the event to perform some actions.
<b>Cutoff Period</b>	The duration for the record cutoff performance.
<b>Cutoff on Obsolete</b>	The record is cutoff when it is obsolete.
<b>Cutoff on Superseded</b>	The record is cutoff when it is removed or replaced.
<b>Process Hold</b>	This boolean data type is used when a record process may be held before the further disposition is handled.
<b>Hold Period</b>	The duration when a record may be held after cutoff which is normally measured in Years.
<b>Discretionary Hold</b>	The Boolean data type is used when a hold may be discretionary, such as after a command change. So, the discretionary hold flag allows the records management module to track these manual checks.
<b>Process Transfer</b>	

Field	Description
	The boolean data type is used to determine how a record process will be transferred.
<b>Default Transfer Location</b>	The text data type is used to determine where a record is transferred by default.
<b>Transfer Block Size</b>	The float data type is used to determine in what size blocks for organizational purposes that is normally measured in Years.
<b>Process Access</b>	The Boolean data type is flagged when a record, which is held permanently, must be ultimately transferred to the national records authority.
<b>Access Location</b>	The text data type is flagged to specify an area for the access transfer.
<b>Access Block Size</b>	The text data type is flagged to determine the blocks size for organizational purposes which is normally measured in Years.
<b>Process Destruction</b>	The Boolean data type is flagged if there is any record to be destroyed. After that, the record is marked in the Alfresco system to be permanently destroyed so that all information, metadata and physical traces are removed and cannot be recovered.

- Fill in the appropriate fields of the tabs in the form.
- Click **Save** or **Save & Close** to finish.

### Create a new Kofax document

- Follow the instructions in the [Add a new document \[268\]](#) section to open the **Add Kofax Document** form.

- Input a name for a Kofax document in the **Name** field which is required. Special characters (@ # % & \* ( ) " ' : ; [ ] { } / !) are not allowed in this field.
- Select categories for a Kofax document by clicking .
- Click **Save** or **Save & Close** to finish.

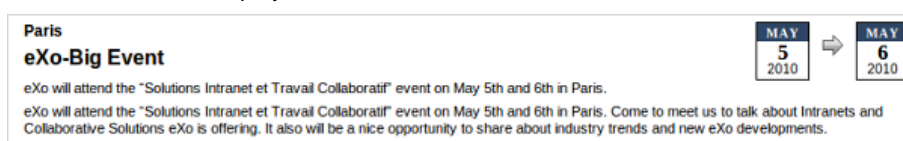
After being created, a Kofax document will be displayed.

- The **File View** tab is used to display all added nodes in that Kofax. Besides, all added files in Kofax are also displayed in the **Document View** tab.

### Create a new event

1. Follow the instructions in the [Add a new document \[268\]](#) section to open the **Add an event document** form.
2. Enter a title for the event.
3. Input the location where the event will take place in the **Location** field. Select the **Google Maps** checkbox if you want the location of the event to be shown on Google Maps.
4. Enter the **Start** and **End Date/Time** of the event.
5. Fill the **Summary** and **Content** fields.
6. Click **Save** or **Save & Close** to finish.

After being created, the event will be displayed like the illustration bellow.



### Create an accessible media

1. Follow the instructions in the [Add a new document \[268\]](#) section to open the content template list, and select the **Accessible Media** template.

**Details:**

Field	Description
Name	

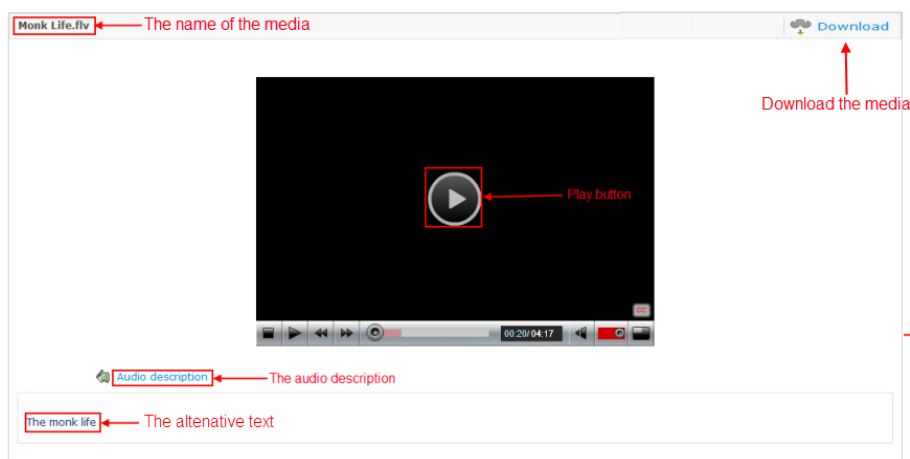
Field	Description
	The document name which is required. Special characters (@ # % & * ( ) " ' : ; [ ] { } / !) are not allowed in the <b>Name</b> field.
<b>Categories</b>	The name of the selected categories.
<b>Language</b>	The language of the media.
<b>Content</b>	The content of the media which is required.
<b>Title</b>	The display name of the media.
<b>Creator</b>	The creator of the media.
<b>Source</b>	The source of the media.
<b>Captions</b>	Provide the text of the dialogue and important sounds.
<b>Audio description</b>	Provide the narrate track of the media. You can browse and upload another media file from your local device to set it as the audio description.
<b>Alternative text</b>	Provide the descriptive information about the media.

2. Input the information in the fields, and attach existing files from your local device to the following fields:

- **Content:** It must be a *.flv* or *.mp3* file.
- **Captions:** It must be a *.srt* or *.mp3* file.
- **Audio description:** It must be a *.flv* or *.mp3* file.

3. Click **Save** or **Save & Close** to finish.


The accessible media can be played right after being created.



**Details:**

Button	Function
	Stop the media.
	Play the media. After clicking this button,  will become  and vice versa.
	Play the previous media.
	Play the next media.
Audio description	



Button	Function
	Listen to the audio description. This icon only appears if you attach another media with the audio description to the <b>Audio description</b> field. After opening the audio description, to back to the original media, click <a href="#">Original video &lt;&lt;</a> .
	Activate/Deactivate the media caption. If you attach an <b>.srt</b> or <b>.xml</b> file to the <b>Captions</b> field, the caption will appear when you clicking this button.

**Note**

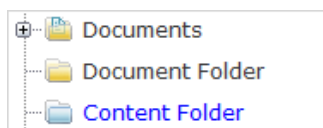
You can also attach **Captions** and **Audio description** to the uploaded media when [editing this document](#). To know how to upload a file, see the [Attach files to a document \[268\]](#) section.

### 5.1.4.3. Add a folder

You can create a document immediately in a specific drive. However, adding a document to a specific folder enables you to manage documents better.

There are two types of folder:

- Content folder.
- Document folder.



In the default skin, the icon for a content folder node is displayed in blue and the icon for a document folder node is displayed in yellow.

#### File and folder types in a folder


##### Content folder

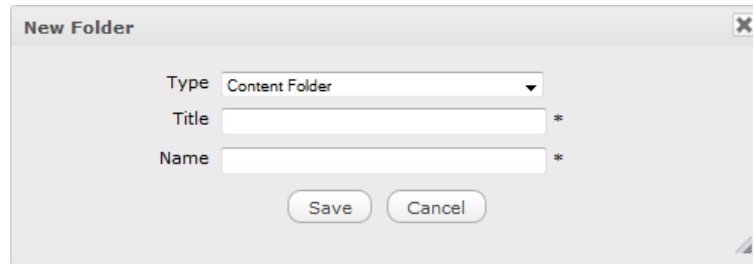
- Add a Content folder to a Content one.
- Add a Document folder to a Content one.
- Add documents to a Content folder.
- Upload files (images, MS Word documents, Open Office documents, .pdf files, .txt files, .xml file, and more) into a Content folder.
- Import sub-nodes which were exported into a Content folder.

##### Document folder

- Add a new Document folder to a Document folder.
- Add File, Podcast, File Plan documents to a Document folder.
- Upload files (images, MS Word documents, OpenOffice documents, .pdf files, .txt files, .xml file, and more) into a Document folder.
- Cannot add a Content folder to a Document folder.
- Cannot import an exported Content folder into a Document folder.
- Cannot import an exported Article, Sample node, Kofax into a Document folder.

#### Create a folder

1. Select the path to create a folder.
2. Click  **New Folder** on the **Action** bar to open the **New Folder** form.



The **New Folder** dialog box has a title bar with a close button. It contains a **Type** dropdown menu set to **Content Folder**. Below it are two text input fields: **Title** and **Name**, both followed by an asterisk (\*) indicating they are required. At the bottom are **Save** and **Cancel** buttons.

3. Select a folder type.
4. Input values for both **Name** and **Title** fields which are required. Special characters (@ # % & \* ( ) " ' : ; [ ] {} / !) are not allowed in these fields.
5. Click **Save** to accept creating a new folder.



#### Note

The name of a folder may be the same as that of the existing one. When a new folder is created with the same name as other existing folders, an index will be added to the name of your newly created folder (for example, test[2]).

You can only create a content folder in another content folder.


You can create a document folder in a content folder or a document folder.

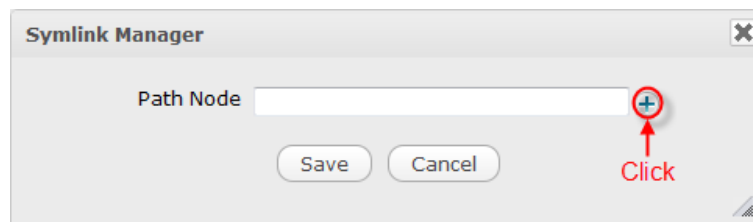
### 5.1.4.4. Add translations to a document

This function enables users to add multiple languages for a document. This action is similar to adding a language.


1. Select a document to which you want to add the translation. For example, select an **Article** in *English*.

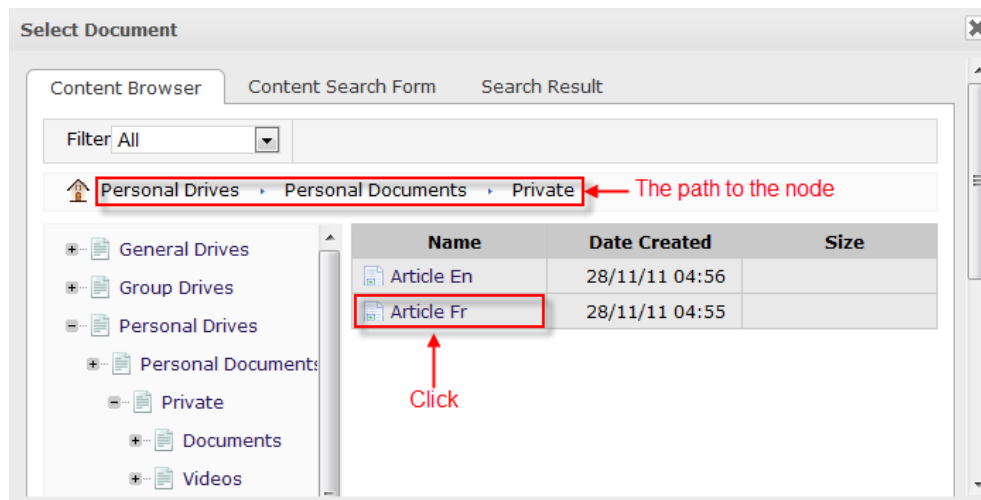


2. Click  **Add Translation** on the **Action** bar to open the **SymLink Manager** form.



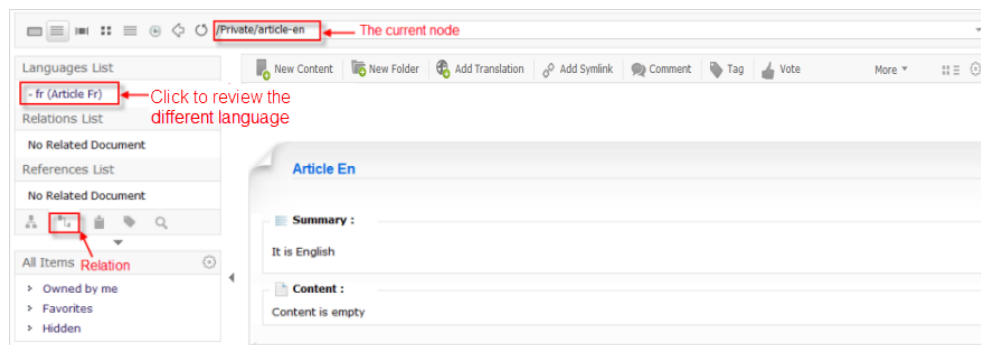
The **SymLink Manager** dialog box has a title bar with a close button. It contains a **Path Node** text input field. To the right of the input field is a red circular button with a white plus sign (+). Below the input field are **Save** and **Cancel** buttons. A red arrow points to the red circular button with the text **Click** below it.

3. Click , then browse to the target document that has different language with the first document. For example, the **Article** version in French.



4. Click **Save** on the **SymLink Manager** form.
5. Select the document to which you have added the translation, then click the **Relation** button on the **Filter** bar.


You will see the available language for the selected document. Click the language on this pane to view the document in the corresponding language version.



#### 5.1.4.5. Add a SymLink

A symlink in Content works like shortcut to a directory or file. To add a Symlink, you can follow one of these ways.


##### The first way

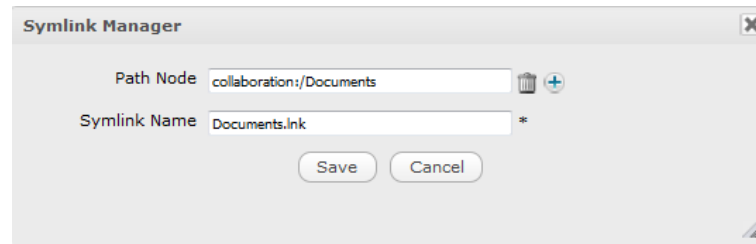
1. Select a node where you want to add a Symlink.
2. Click  **Add Symlink** on the **Action** bar to open the **SymLink Manager** form.

##### Details:

Field	Description
<b>Path Node</b>	The path to the target node.
<b>Symlink Name</b>	The name of the Symlink.

3. Click  to open the **Select Target Node** form.

- Select the workspace which contains the node that you want to add a Symlink.
- Click  in the row of the node that you want to add. The path that the node will appear in the **Path Node** field and the name of the node is set by the name of the selected node. You can also edit this name.



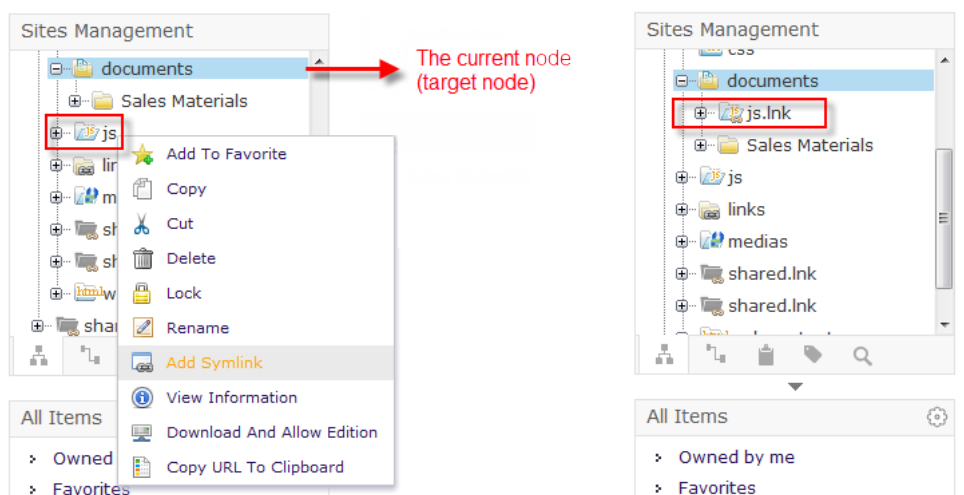
- Click **Save** to finish adding a Symlink.

Name	Versionable	Owner	Date Modified	Date Created
Digital Assets	false		7/26/12 1:26 AM	7/26/12 1:26 AM
Documents	true		7/26/12 9:05 AM	7/26/12 1:26 AM
Documents.Ink	true	john	7/26/12 9:05 AM	7/26/12 9:05 AM
exo:registry	false		7/26/12 1:26 AM	7/26/12 1:26 AM
Groups	false		7/26/12 1:26 AM	7/26/12 1:26 AM
Records Space	false		7/26/12 1:26 AM	7/26/12 1:26 AM
sites content	false		7/26/12 1:26 AM	7/26/12 1:26 AM
tags	false		7/26/12 1:26 AM	7/26/12 1:26 AM
Users	false		7/26/12 1:26 AM	7/26/12 1:26 AM

### The second way

- Right-click a node that you want to create a Symlink. Note that if you follow this way, the Symlink will be created to the current node.
- Click **Add Symlink** from the drop-down menu.

This node will become a Symlink to the current node.



### Note

You should notice the different behaviour between adding a Symlink via the **Action** bar and the right-click menu.

- After you have right-clicked a node, then selected **Add Symlink**, a Symlink to the current node is created.
- Meanwhile, when you select **Add Symlink** on the **Action** bar, a **Symlink Manager** form will appear to let you select the target node.



### Warning

You will get an error message if you create a Symlink inside the following content types: Article, CSS, Event, HTML, JS, Kofax, Podcast, Sample node, Weblink.


## 5.1.4.6. Comment

This function is used to comment on a document.




### Note

You cannot comment on a **File Plan** document.

1. Select a document to which you want to add your comment.
2. Click  **Comment** on the **Action** bar to open the **Comment** form.
3. Add your comment to the **Comment** field.
4. Click **Save** to commit.

The comments are shown at the bottom of the document.



## The best places for summer 2011

**Summary :**

If you're on the lookout for a fantastic deal on summer holidays in 2011, you've come to the right place. With plenty of low cost package holidays available, we've got something for everyone. Whether you're a couple looking to get away for a relaxing break, a group of friends in search of some fun in the sun or a family planning a child-friendly trip abroad, there are a host of cheap summer holidays on offer in 2011.

**Content :**

If you're on the lookout for a fantastic deal on summer holidays in 2011, you've come to the right place. With plenty of low cost package holidays available, we've got something for everyone. Whether you're a couple looking to get away for a relaxing break, a group of friends in search of some fun in the sun or a family planning a child-friendly trip abroad, there are a host of cheap summer holidays on offer in 2011.

**Links :**

**Attachments :**

Avg. Rating: 0.0 Votes: 0

★★★★★

Last comment posted by *mary* at 11:44 AM. Thu, Jul 14, 2011

1 Comment(s) [Show comments](#)

To view your comment, click the **Show comments** link:




You can edit your comment by clicking  or delete it by clicking .

### 5.1.4.7. Edit a document

There are 2 ways to edit a document.

#### The first way

1. Select a document you want to edit in the left panel.
2. Click  **Edit** on the **Action** bar.

#### The second way


1. Select a folder that contains the document you want to edit.
2. Right-click the document you want to edit and select **Edit** from the menu.

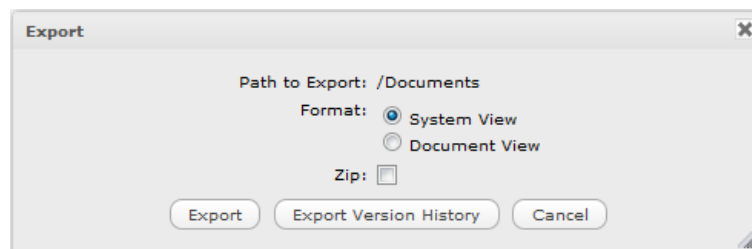
The form to edit the document will appear. All information of the selected document will be displayed in this form and ready for you to change except the **Name** field.

3. Click **Save** to commit your changes.

### 5.1.4.8. Export nodes

Nodes can be exported into either *.xml* or *.zip* file types.

1. Select a node that you want to export.
2. Click  **Export** on the **Action** bar to show the **Export** form.



#### Details:

Fields	Description
<b>Path to Export</b>	The path of the node being exported. This field will be pre-populated.
<b>Format</b>	The format of the original node.
<b>System View</b>	Each node and each property of that node is included in a different tag.
<b>Document View</b>	Each node is a tag and properties of that node are considered to be elements of that tag.
<b>Zip</b>	If this field is checked, the node will be exported as a <i>.zip</i> file.

3. Click **Export** and select a location to save the exported file.


**Note**

The **Export** form can contain **Export Version History** if the exported node or any of its child nodes is versioned.

This action exports all of the node's version history.

### 5.1.4.9. Import nodes

Nodes which are in the *.xml* file format can be imported into the JCR Explorer system.

1. Select the location where you want to import the new node.
2. Click  **Import** on the **Action** bar. The **Import** form appears.

3. Click **Browse...** next to the **Upload File** field and navigate to the file you want to import.
4. Select one value from the **UUID Behaviour** drop-down menu, including:

#### Create New

If you select this behavior, the imported nodes receive new UUIDs which are completely independent of any existing nodes. As the imported nodes get new UUIDs, there are no UUID conflicts with the existing nodes in the workspace. The existing nodes in the workspace are not moved, modified or deleted. The imported nodes are considered as new nodes and therefore, do not have a version history. You cannot import a version history for these nodes.

#### Remove Existing

If you select this behavior, the imported nodes in a selected path receive the same UUIDs of the exported nodes. As the result, there is UUID conflicts with the existing nodes. Therefore, the existing nodes are removed from the workspaces and the new nodes will have the same version history as the existing nodes.

#### Replace Existing

If you select this behavior, you only can import the exported nodes into their original workspaces where they are exported. When the new nodes are created with the same UUIDs of the existing nodes, causing UUID conflicts with the existing nodes in the workspaces. Therefore, the existing nodes are replaced by the new ones in the same location and the new nodes have the same version history as the existing nodes.

#### Throw Exception

If you select this behavior, there is a message which will alert that you can not import this node in case this node has been existing in the workspace. If this node has not existed, a new node will be created.

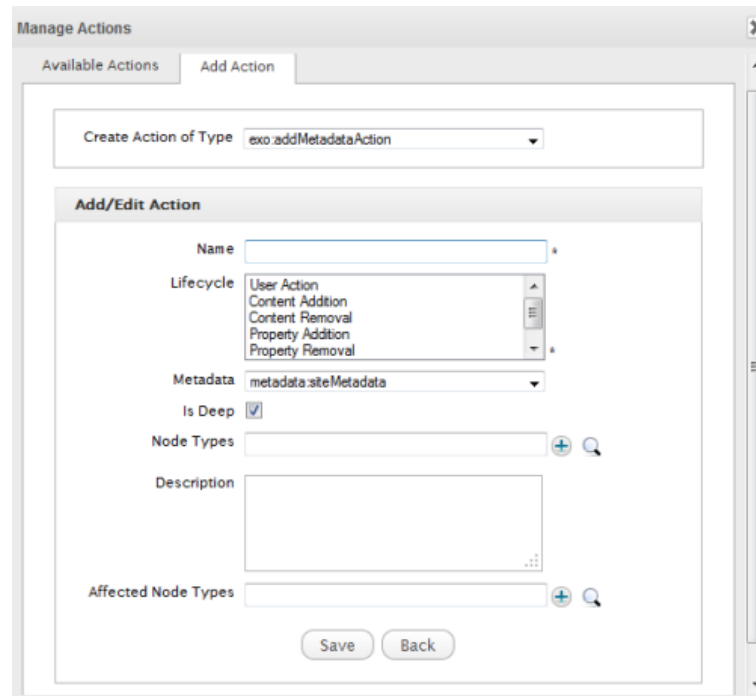
5. Click **Browse...** next to **Version History** to select a version to import.
6. Select a format.
7. Click **Import** to import the file's selected version.

### 5.1.4.10. Manage actions

#### 5.1.4.10.1. Add an action

1. Select the node to which you want to add an action.

2. Click  **Actions** on the **Action** bar.  
The **Manage Actions** form will appear.
3. Select the **Add Action** tab.



The screenshot shows the 'Manage Actions' dialog box with the 'Add Action' tab selected. The 'Create Action of Type' dropdown is set to 'exo.addMetadataAction'. The 'Add/Edit Action' section contains the following fields:

- Name:** A text input field.
- Lifecycle:** A list box with options: User Action, Content Addition, Content Removal, Property Addition, and Property Removal.
- Metadata:** A dropdown menu set to 'metadata:siteMetadata'.
- Is Deep:** A checked checkbox.
- Node Types:** A text input field with a search icon.
- Description:** A large text area.
- Affected Node Types:** A text input field with a search icon.

At the bottom of the dialog are 'Save' and 'Back' buttons.

**Details:**

Field	Description
<b>Name</b>	The name of this action. This name is internal to the JCR explorer.
<b>Lifecycle</b>	<p>Select the lifecycle for this action. The action will be executed, depending on the lifecycle:</p> <ul style="list-style-type: none"> <li>• <b>'User Action'</b>: The action is executed when right-clicking the folder and then selecting the action.</li> <li>• <b>'Content Addition'</b>: The action will be executed on a new document, but not on a subfolder when the document or the subfolder is created in the folder to which an action has been added. It is also applied to a new document in the subfolder of the folder.</li> <li>• <b>'Content Removal'</b>: The action will be executed on a document, but not on a subfolder in the folder when the document or the subfolder is moved.</li> <li>• <b>'Property Addition'</b>: The action will be executed on a document when a property is added to the document.</li> <li>• <b>'Property Removal'</b>: The action will be executed on a document when a property is removed from the document.</li> </ul>



Field	Description
	<ul style="list-style-type: none"> <li>• <b>'Property Modification'</b>: The action will be executed on a document when a property of the document is modified.</li> <li>• <b>'Schedule'</b>: The action is done at specific time.</li> </ul> <p>If you need the same action to be executed in several lifecycles, you have to create several actions.</p>

4. Select one type for your action from the **Create Action of Type** drop-down menu.

```
exo:addMetadataAction
exo:autoVersioning
exo:createRSSFeedAction
exo:enableVersioning
exo:getMailAction
exo:populateToMenu
exo:sendMailAction
exo:taxonomyAction
exo:transformBinaryToTextAction
```

#### Details:

Field	Description
<b>exo:AddMetadataAction</b>	Add metadata.
<b>exo:autoVersioning</b>	Add a version automatically.
<b>exo:createRSSFeedAction</b>	Create an RSS file.
<b>exo:enableVersioning</b>	Enable versioning.
<b>exo:getMailAction</b>	Fetch mails.
<b>exo:populateToMenu</b>	This type is not supported.
<b>exo:sendMailAction</b>	Send mails.
<b>exo:taxonomyAction</b>	Create categories.
<b>exo:transformBinaryToTextAction</b>	Convert <i>.pdf</i> or <i>.doc</i> file types into plain text.

5. Complete all the fields in the form. The **Name** and **Lifecycle** fields are required.  
 6. Click **Save** to commit the action.

All actions of a node are listed in the **Available Actions** tab.

Once an action is added to a node, it is auto-added to any child nodes of the selected node.


If an action is added with the lifecycle named 'User Action', it will be applied to the current node. If an action is added with other lifecycles, it will be applied to the child nodes.



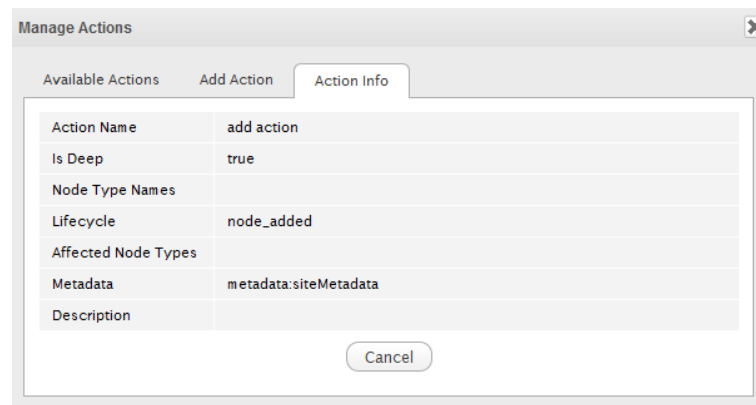
#### Note

Not all actions are listed in a right-click menu of nodes. Some actions can be performed immediately when that action is added.

#### 5.1.4.10.2. View an action

1. Open the **Manage Actions** form and select the **Available Actions** tab.
2. Click  that corresponds to the action you want to view.

The details will be displayed in the **Action Info** tab.



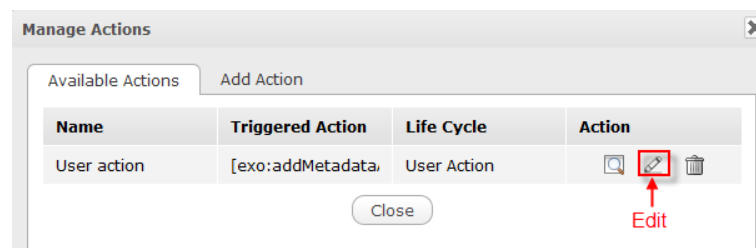
The 'Manage Actions' dialog box is shown with the 'Action Info' tab selected. It contains a table with the following data:

Action Name	add action
Is Deep	true
Node Type Names	
Lifecycle	node_added
Affected Node Types	
Metadata	metadata:siteMetadata
Description	




A 'Cancel' button is located at the bottom right of the dialog.

### 5.1.4.10.3. Edit an action


1. Open the **Manage Actions** form and select the **Available Actions** tab.

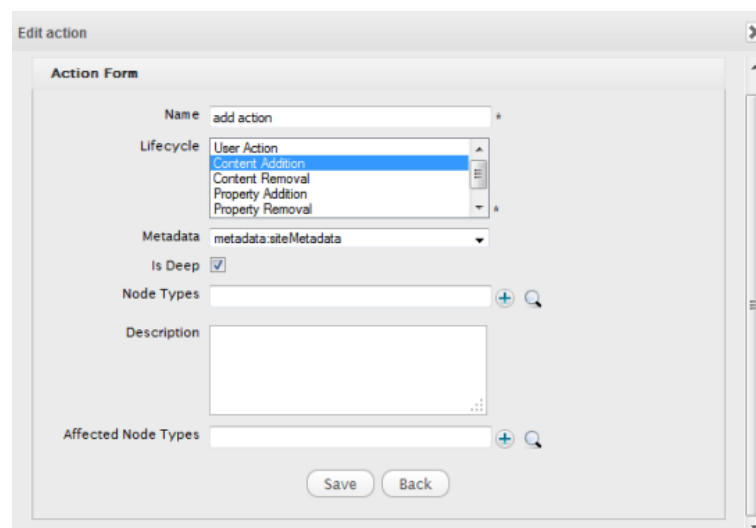


The 'Manage Actions' dialog box is shown with the 'Available Actions' tab selected. It contains a table with the following data:

Name	Triggered Action	Life Cycle	Action
User action	[exo:addMetadata]	User Action	  

A red box highlights the 'Edit' icon (pencil) in the 'Action' column, with a red arrow pointing to it and the word 'Edit' written below. A 'Close' button is at the bottom center.

2. Click  that corresponds to the action you want to modify.
3. Edit properties in the **Action Form**.



The 'Edit action' dialog box is shown. It contains the following fields:

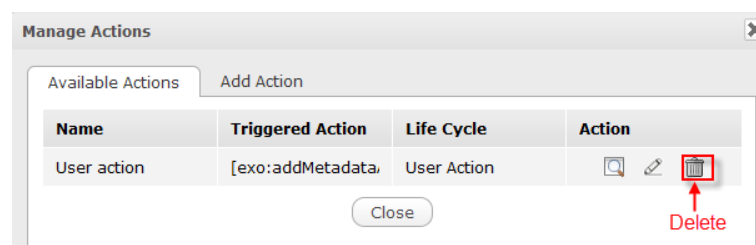
- Name:** add action
- Lifecycle:** User Action (selected in a dropdown menu with options: User Action, Content Addition, Content Removal, Property Addition, Property Removal)
- Metadata:** metadata:siteMetadata
- Is Deep:** ☒
- Node Types:** (empty text field with a search icon)
- Description:** (empty text area)
- Affected Node Types:** (empty text field with a search icon)

'Save' and 'Back' buttons are at the bottom.




4. Click **Save** to accept your changes.

### 5.1.4.10.4. Delete an action


1. Open the **Manage Actions** form and select the **Available Actions** tab.



The 'Manage Actions' dialog box is shown with the 'Available Actions' tab selected. It contains a table with the following data:


Name	Triggered Action	Life Cycle	Action
User action	[exo:addMetadata]	User Action	  

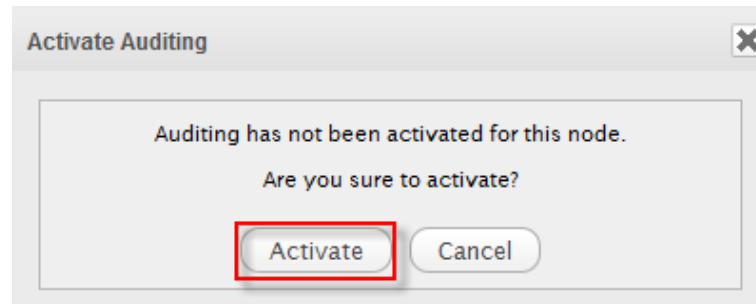
A red box highlights the 'Delete' icon (trash) in the 'Action' column, with a red arrow pointing to it and the word 'Delete' written below. A 'Close' button is at the bottom center.


2. Click  that corresponds to the action you want to modify.
3. Click **OK** in the confirmation message to delete the action.

### 5.1.4.11. Manage auditing

This function logs property changes in nodes.

1. Select a node.
2. Click  on the **Action** bar. The **Activate Auditing** message appears.



3. Click **Activate** to enable auditing on the selected node.
4. Click  again to view the audit information of the selected node.

The **Auditing Information** list appears.

Auditing Information			
Operation	Username	Date	Version
Property added	john	09/30/2011 18:22:17	No Version
Close			


If the node has no audit information, the form will appear as below.

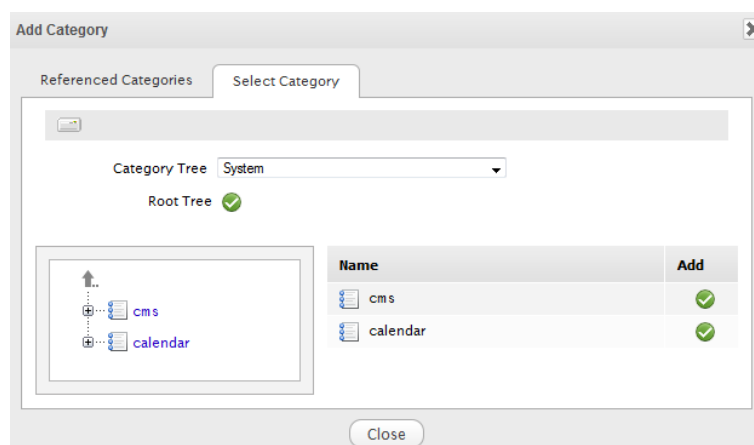
Auditing Information			
Operation	Username	Date	Version
Empty Data			
Close			

### 5.1.4.12. Manage categories

#### Assign a category to a node

You can add categories to the document type nodes only.

1. Select the node to which you want to add a category.
2. Click  on the **Action** bar.  
The **Add Category** form appears.
3. Select the **Select Category** tab to show the available categories.



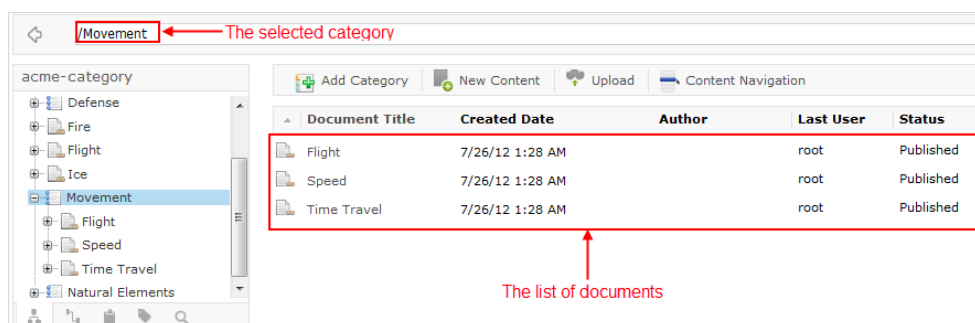
- Click to add the corresponding category to the node.

The category, which has been added to a node, is listed in the **Referenced Categories** tab.

All nodes, which belong to a category, can be viewed as follows:

#### View a category

- Go to the drive which contains the category you have added. There will be a list of categories available.
- Select your desired category. The documents in that category will be listed.



#### Note

When copying and pasting a node in a drive, a new node with the same content will be created with a different name.

When copying and pasting a node in the category tree, a reference to the original node will be created. This reference is a link rather than a copy. This feature is used to preserve the disk space.


#### Delete a category

- Select a categorized node.
- Click Categories.
- Select the **Referenced Categories** tab.
- Click that corresponds to the category you want to delete.

#### 5.1.4.13. Show/Hide content

Nodes can be hidden or shown easily.

#### Hide a node

1. Select the node you want to hide.
2. Click  **Show/Hide Content** on the **Action** bar to hide the node.


A confirmation message, which notifies that the node has been hidden, will appear.

### Show a node

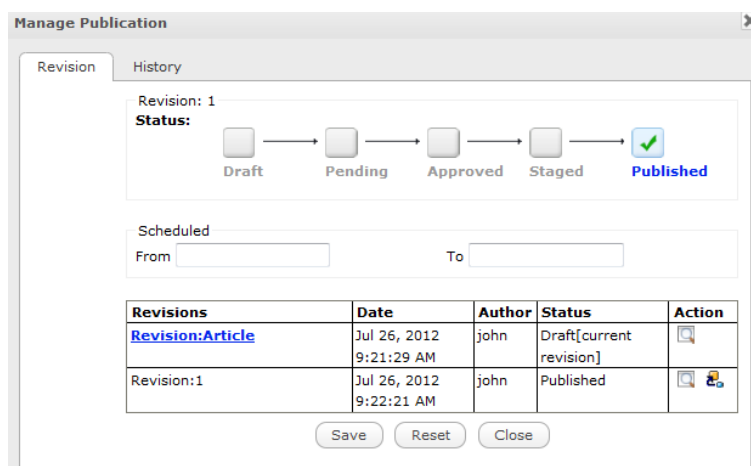
To show a hidden node, click  **Show/Hide Content** again.

### 5.1.4.14. Manage publication



This function is used to manage node publication.

1. Select a node (on the left or right pane) which you want to manage its publication.
2. Click  **Publications** on the **Action** bar.

The **Manage Publication** form appears.





The screenshot shows the 'Manage Publication' dialog box with two tabs: 'Revision' and 'History'. The 'Revision' tab is active, showing 'Revision: 1' and a status flow from Draft to Pending to Approved to Staged to Published. Below this is a 'Scheduled' section with 'From' and 'To' date pickers. At the bottom is a table of revisions.

Revisions	Date	Author	Status	Action
<a href="#">Revision:Article</a>	Jul 26, 2012 9:21:29 AM	john	Draft[current revision]	
Revision:1	Jul 26, 2012 9:22:21 AM	john	Published	

Buttons at the bottom: Save, Reset, Close.

The **Revision** tab displays some basic information and the current state of the selected node.

3. Click  to view the content of the node or click  to restore a version (refer to the [Manage versions](#) section for information about versioning).
4. Select the **History** tab to view the publications history of the node.
5. Click **Save** to accept your changes.




#### Note

See the [Publication process](#) section to understand more **Manage Publication**.


### 5.1.4.15. Add/Delete/View relations

#### Add a relation

You can use this function to create relations between nodes.

1. Select the node you want to add a relation to.
2. Click  **Publications** on the **Action** bar.



The **Add Relation** form appears.

3. Select the **Select Relation** tab to see a list of other documents.
4. Click  that corresponds to the documents related to the document selected in the **Step 1**.  
Documents linked to the original via a relation will be listed in the **Relation List** tab.

**Note**


Relations can only be added to document and uploaded file node types.  
A node cannot have a relation to itself.

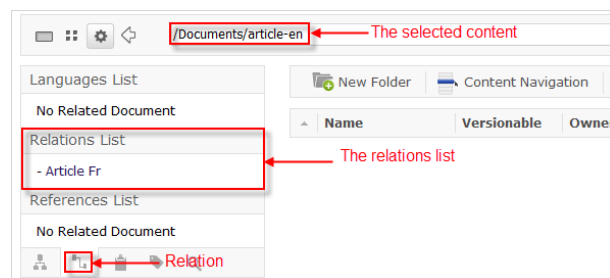
**Delete a relation**

1. Select a node that has links to related documents.
2. Click the  button on the **Action** bar.
3. Select the **Relation List** tab to view relations of the selected node.
4. Click  corresponding to the relation you want to remove.
5. Click **OK** in the confirmation message to accept your deletion.

The related document will be removed from the list.

**View a relation**


1. Select a node that has links to related documents.
2. Click  on the **Filter** bar.



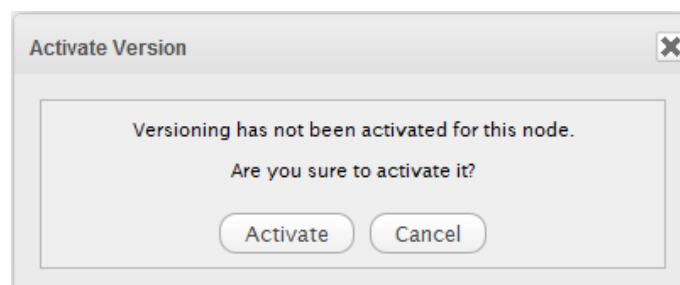
All nodes related to the selected node will be displayed in the **Relations List** in the left pane.

3. Click the name of the related node to view the document.

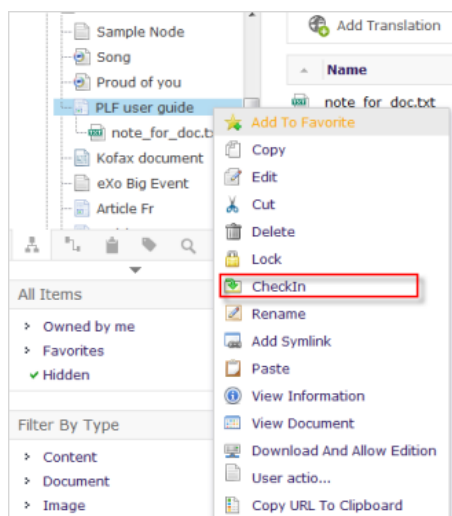
**5.1.4.16. Manage versions****5.1.4.16.1. Add versions to a node**


1. Select a node to add a version to.
2. Click  on the **Action** bar.

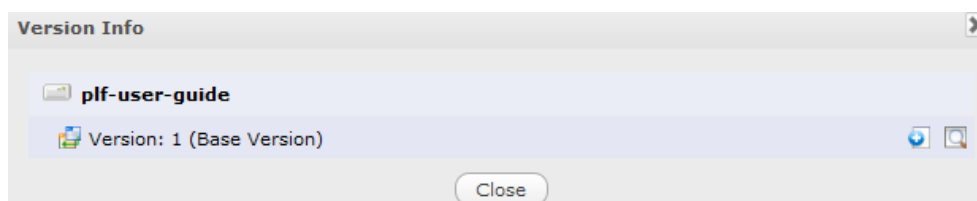
The following message will appear.



- Click **Activate** to enable a version for the node.
- Right-click the selected node and select **CheckIn** from the drop-down menu.



- Click  again to open the **Version Info** window.



The node selected in Step 1 has been added as the *Base version*..

- Right-click the node again and select **CheckOut** to obtain a version of this node.





#### Note

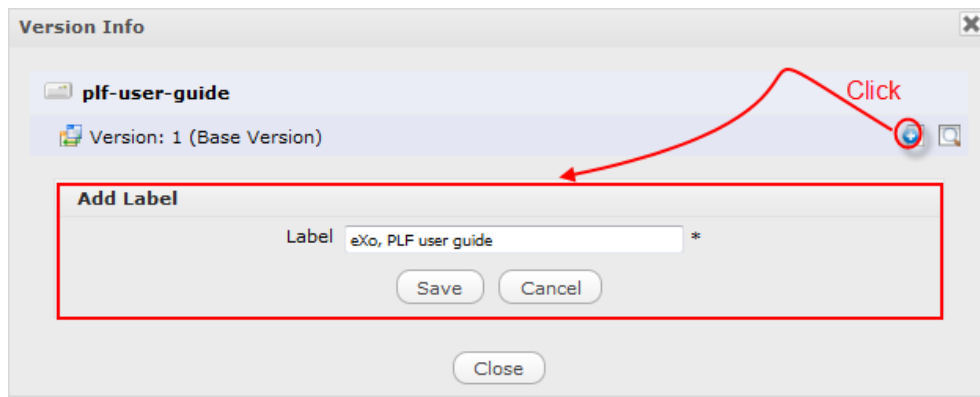
No actions (copying/cutting/rename) can be taken on a node in the **CheckIn** status. You must check it out before you can perform any actions on it.

If you want to add more versions to a node, right-click the selected node above and select **CheckIn** and then **CheckOut**.

### 5.1.4.16.2. Add/Remove labels for versions



#### Add a label

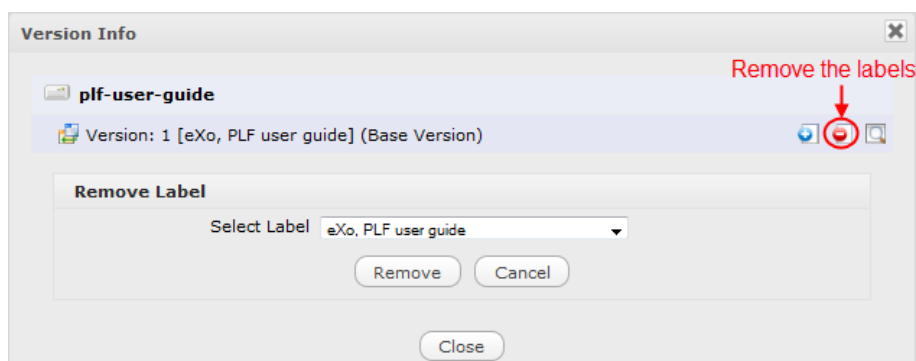
- Select a versioned node.
- Click  on the **Action** bar.
- Click  on the **Version Info** window to show the **Add Label** field under the version list.



4. Enter a value into the **Label** field.  
The label must be unique without containing any special characters, such as @, #, \$.
5. Click **Save** to submit the new label.



#### Remove a label

1. Select a versioned node which has at least one label.
2. Click  **Versions** on the **Action** bar.
3. Click  on the **Version Info** window to show the **Remove Label** field under the versions list.

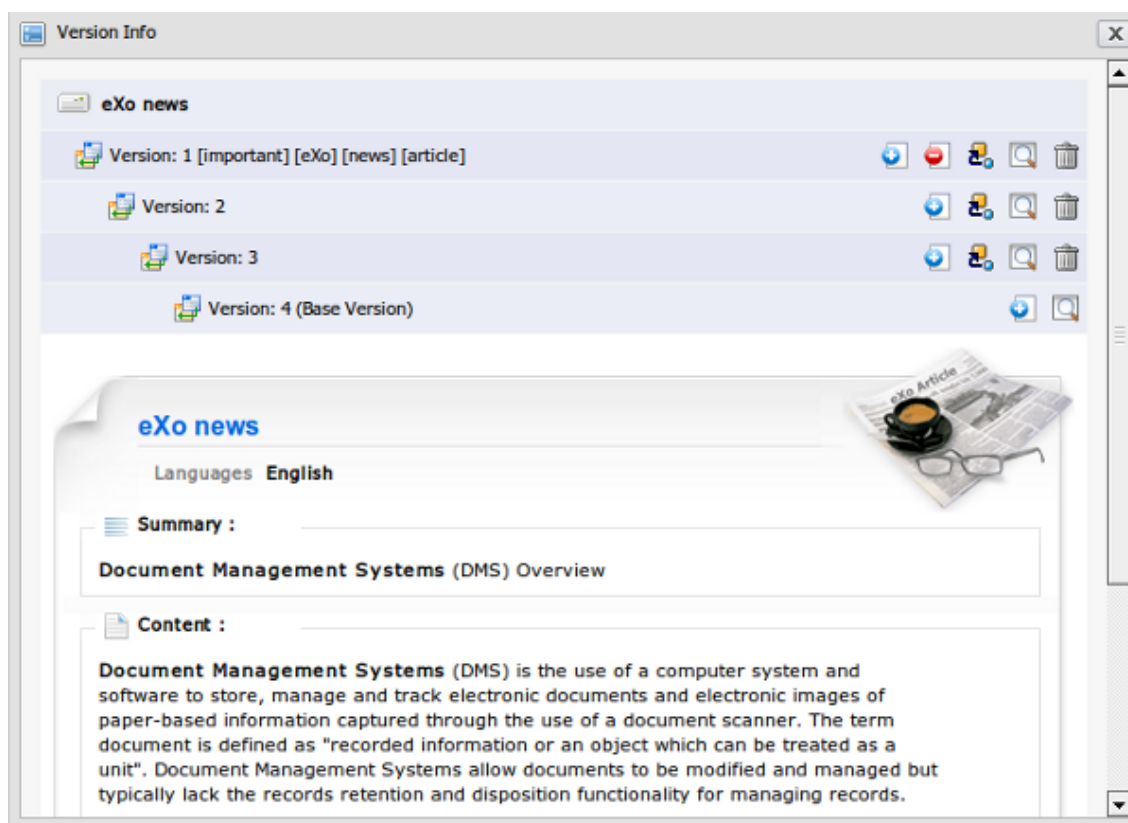


4. Select the label you want to remove from the drop-down menu.
5. Click the **Remove** button to remove the selected label.


#### 5.1.4.16.3. View versions

1. Select a versioned node.
2. Click  **Versions**.
3. Click  to see the current versions of the selected node.





**Note**



Version viewing is not supported on folder nodes.

If you click  while the selected node is a folder, a message will appear.

**5.1.4.16.4. Restore a version**

1. Select a node which has at least two versions stored.
2. Click  **Versions**.
3. Select the version that you want to restore as the base version.
4. Click  to restore the selected version.

**5.1.4.16.5. Delete a version**


1. Select a node which has at least two versions.
2. Click  **Versions**.
3. Click  corresponding to the version you want to delete.
4. Click **OK** in the confirmation message to accept your deletion.

**Note**

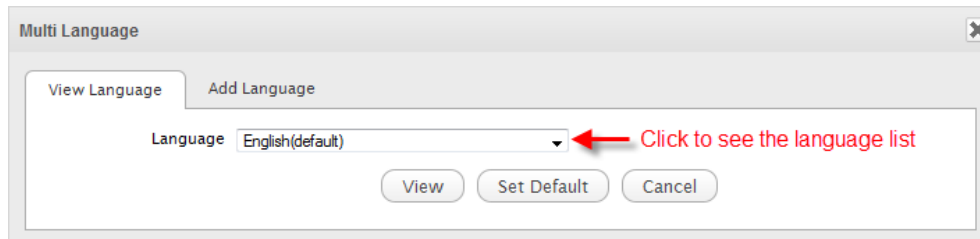
You cannot delete a base version.

### 5.1.4.17. Multi-Languages

This function is used to add multiple languages to a document. Each document can be displayed in many languages.

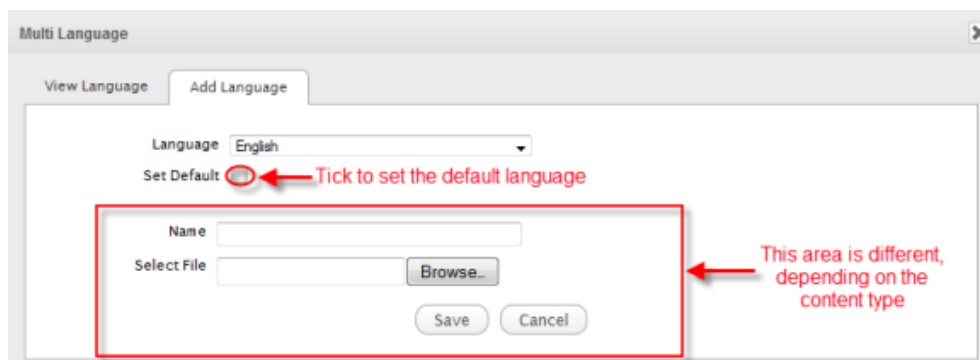
1. Select a document that you want to add languages.
2. Click  on the **Action** bar.

The **Multi Language** form will appear.



The **View Language** tab contains a list of all languages. The default language for the document will be automatically populated.

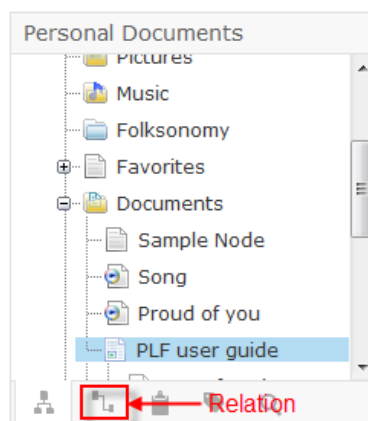
3. Select the **Add Language** tab. This tab will be displayed differently, depending on which file you selected. However, the area where you can add languages to a document is the same. The below illustration shows the **Add Language** tab for a **Sample node** file:



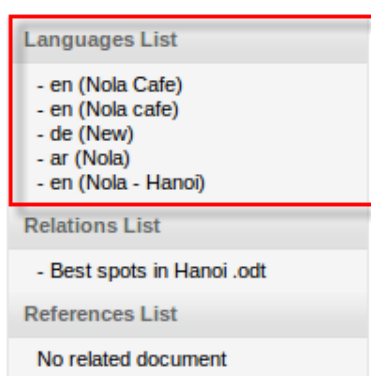
4. Select a language you want to add from the **Language** drop-down list.  
If the selected language has not been added to the current document, the content field will be blank.  
Select the **Set Default** checkbox if you want to set your selected language as a default language.
5. Click **Save** to be returned to the **View Language** tab. Your selected language is now added to the **Language** field.  
You can view this document in your newly added language by selecting that language from the **Language** drop-down list, then click the **View** button.

#### View the languages list of a document

1. Select a document that you want to view the languages list, then click the **Relation** button on the **Filter** bar:



- The list of language (and all related documents) will be displayed in the left pane.



You can view the document in the new language by clicking the corresponding link in **Languages List**.

For more details about **Relations**, refer to the [Views relations \[292\]](#) section.




#### Note

You cannot add multiple languages to a **File Plan** document.

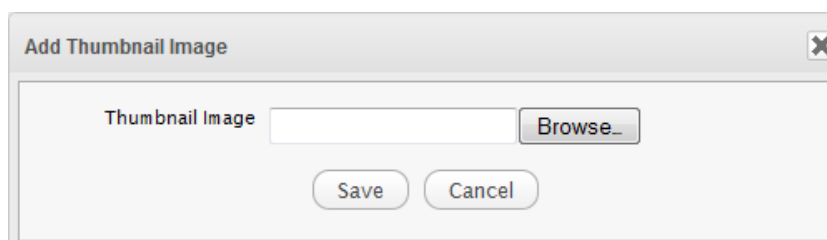
When a document is a sub-node of **File Plan**, you also cannot add language to it.

### 5.1.4.18. Overload thumbnails

You can overload a thumbnail image for a folder. Overloading allows a folder to be represented by a thumbnail image, rather than a folder icon (see the [Thumbnail view](#) section).

- Select the folder you wish to overload with a thumbnail image.
- Click  **Overload Thumbnail** on the **Action** bar.


The **Add Thumbnail Image** form appears.



- Click **Browse...** to select the image which will be used as the display icon for the selected folder.
- Click **Save** to accept your changes. The node will be stored in an *exo:thumbnails* folder.

### 5.1.4.19. Request approval


If you want to publish one created content but you do not obtain the 'Publish' right, you must send a request for approving your content.

1. Select the content that you want to send the request for publishing it.
2. Click  **Request Approval** on the **Action** bar.

The content is displayed at the bottom of the **Sites Explorer** of the people who have the right to approve content.

### 5.1.4.20. Approve content


When content is created by users, it is possible to approve the publication if there is an approval request. To approve content, do the followings:

1. Select content that needs approving.
2. Click  **Approve Content** on the **Action** bar and the content is ready to be published.




#### Note

The **Approve Content** button is only visible for users who have the right to approve content.  
By default, this button is not displayed on the **Action** bar.

Enable this function by selecting  --> **Content** --> **Content Administration** --> **Content Presentation** --> **Manage Views**. See the [Manage views](#) section to know how to add the **Approve Content** button to the tabs on the **Action** bar in **Sites Explorer**.

### 5.1.4.21. Publish content


After the content is approved, it can be published by people who have the "Publish" permission.

1. Select content that you want to publish.
2. Click  **Publish** on the **Action** bar. The content will be published as the schedule that you set up.





#### Note

The **Publish** button is only visible for users who have the "Publish" right.  
By default, the button is not displayed on the **Action** bar.

Enable this function by selecting  --> **Content** --> **Content Administration** --> **Content Presentation** --> **Manage Views**. See the [Manage views](#) section to know how to add the **Publish Content** button to the tabs on the **Action** bar in **Sites Explorer**.

### 5.1.4.22. Show drives

This function enables you to show or hide all the drives in **Sites Explorer**.

- To show drives, click  **Show/Hide Drives** on the **Action** bar.
- To hide drives, click  **Show/Hide Drives** again.


### 5.1.4.23. Show/Hide content structure

This function allows you to view document nodes in a tree structure.

#### Show the JCR Structure

1. Select a document.
2. Click  **Show/Hide Content Structure** on the **Action** bar.


#### Hide the JCR Structure

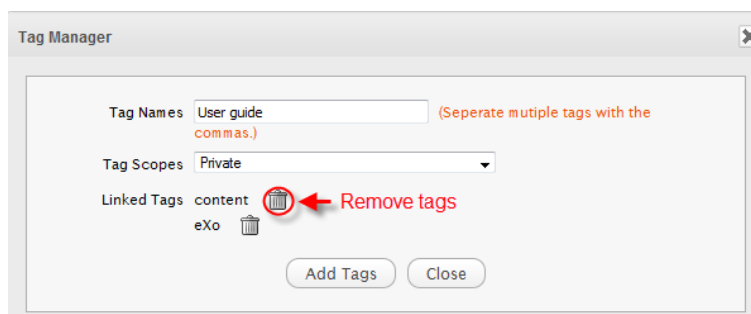
1. Select a document which is showing the JCR structure.
2. Click  **Show/Hide Content Structure** again.

### 5.1.4.24. Tag documents

A tag is a keyword or term associated with or assigned to a piece of information (a picture, a geographic map, a blog entry, a video clip, and more). Each tag describes one item and enables the keyword-based classification and search of information.


#### Add a new tag to a document

1. Select a document to which you want to add tags.
2. Click  **Tag** on the **Action** bar. The **Tag Manager** will be displayed.





#### Details:

Field	Description
<b>Tag Names</b>	The tag names that users want to add tags to documents.
<b>Tag Scopes</b>	Classify the tags. There are four tag types: private, public, group, and site. Currently, the two first types are activated ("Private" means that a user who creates tags can view and edit tags; "Public" means that all users can view and edit tags).
<b>Linked Tags</b>	List all tags of a document after the <b>Add Tags</b> button has been clicked.


3. Input a value into the **Tag Names** field. Several tags can be added to a document at a time. To do that, input all tag names in the **Tag Names** field and separate by commas.
4. Select a value for the **Tag Scopes** field.
5. Click **Add Tags** to accept, or **Close** to quit. Only you can see this tag in this document.
6. Click  to delete tags.

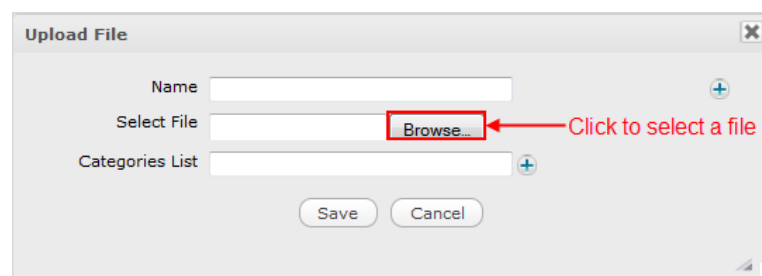
## Remove tags from a document

1. Select a document with tags that you want to delete the tags.
2. Click  on the **Action** bar to open the **Tag Manager** form.
3. Click  corresponding to the tags you want to delete.
4. Click **OK** in the confirmation message to delete the tags.


### 5.1.4.25. Upload files into folders

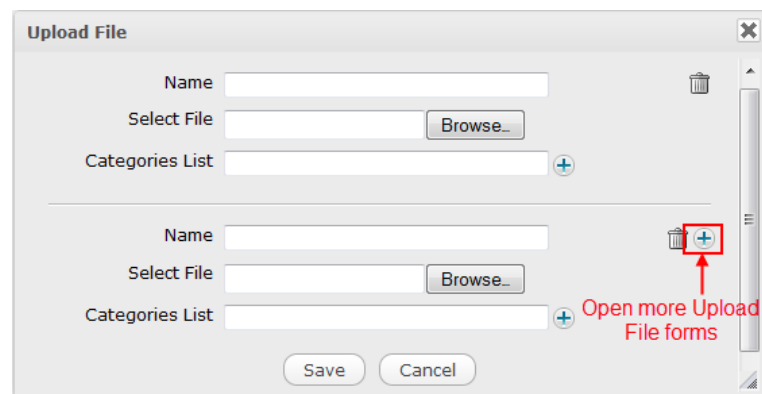
This function allows you to upload a file from your device. All file types can be uploaded. Special characters (! @ \$ % & [ ]) are not allowed.

1. Select the folder that you want to upload a file into from the left/right pane.
2. Click  on the **Action** bar to open the **Upload File** form.




3. Browse and select a file on your device by clicking the **Browse...** button. The selected file name will be displayed in the **Select File** field.

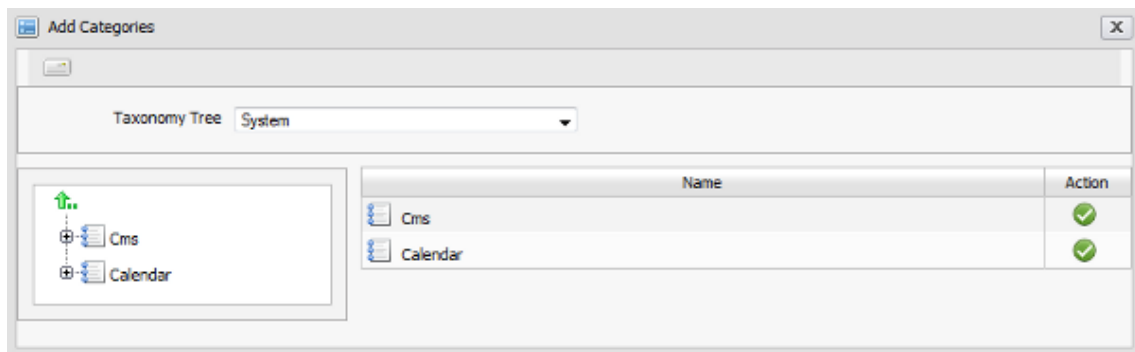
If you want to upload multiple files at the same time, click  to open more **Upload File** forms.




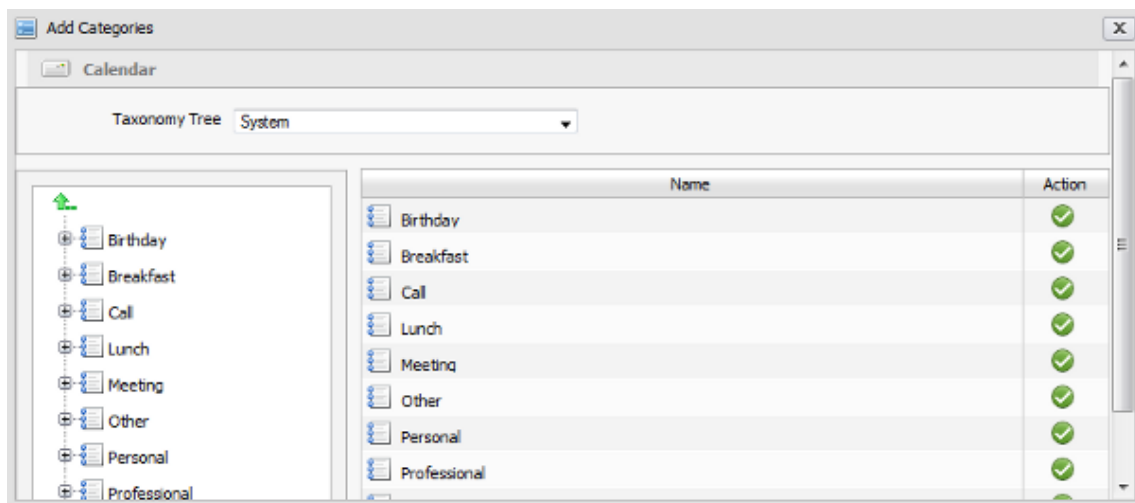
Click  to close a **Upload File** form.

To change the uploaded file, click  in the **Select File** field and select **Browse...** again to select another one.


4. Optionally, type a name in the **Name** field which is not required. Special characters (! @ \$ % & [ ]) are not allowed in this field. If not, the name of the uploaded file will be kept as original.
5. Click  next to the **Categories List** field to select categories to which you want to add this file.




- i. Select a category in the left pane to open its child nodes in the right pane.
- ii. Click  corresponding to a child node that you want.



### Note

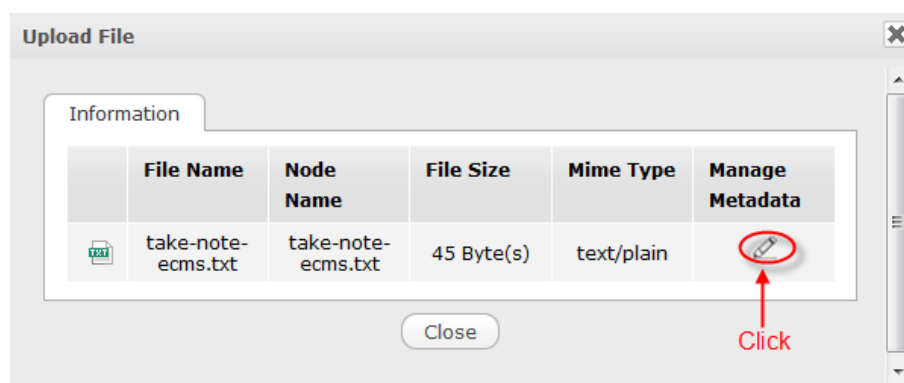
You can add more categories to a file by clicking  again to open the **Add Categories** form.


Click  to delete a category in **Upload File** form.

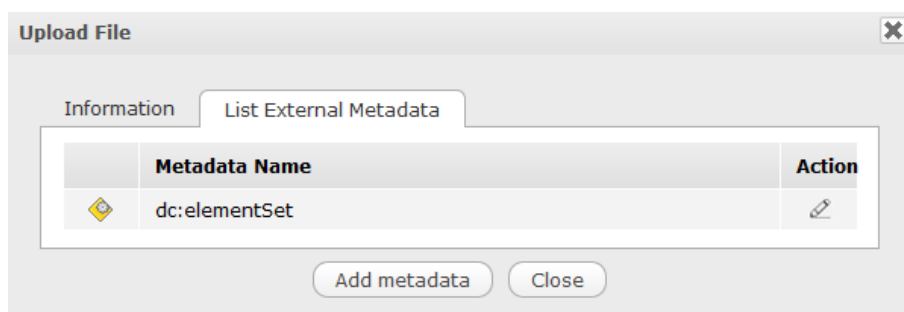
You also manage categories which have been added to files by using the **Manage Categories** function. See the [Manage categories](#) section.




6. Complete uploading file by clicking **Save**.

After being saved, the main information of the uploaded file will be displayed.




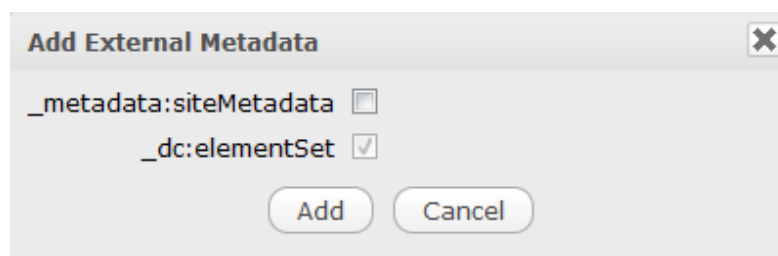
7. Optionally, click  to see more details about its external metadata information. The **List External Metadata** tab will be enabled and you can do some actions in this tab.



Information	List External Metadata				
	<table border="1"> <thead> <tr> <th>Metadata Name</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>dc:elementSet</td> <td></td> </tr> </tbody> </table>	Metadata Name	Action	dc:elementSet	
Metadata Name	Action				
dc:elementSet					

Add metadata Close

- Click  corresponding metadata that you want to edit.
- Click **Add metadata** to add more metadata to the uploaded file. Then, tick the checkbox, and click **Add**.



**Add External Metadata**

☐ \_metadata:siteMetadata

☒ \_dc:elementSet

Add Cancel

The new metadata are displayed in the **List External Metadata** tab.

8. Click **Close** to quit the **Upload File** form.

After being uploaded, the tree is displayed in the left pane.




#### Note

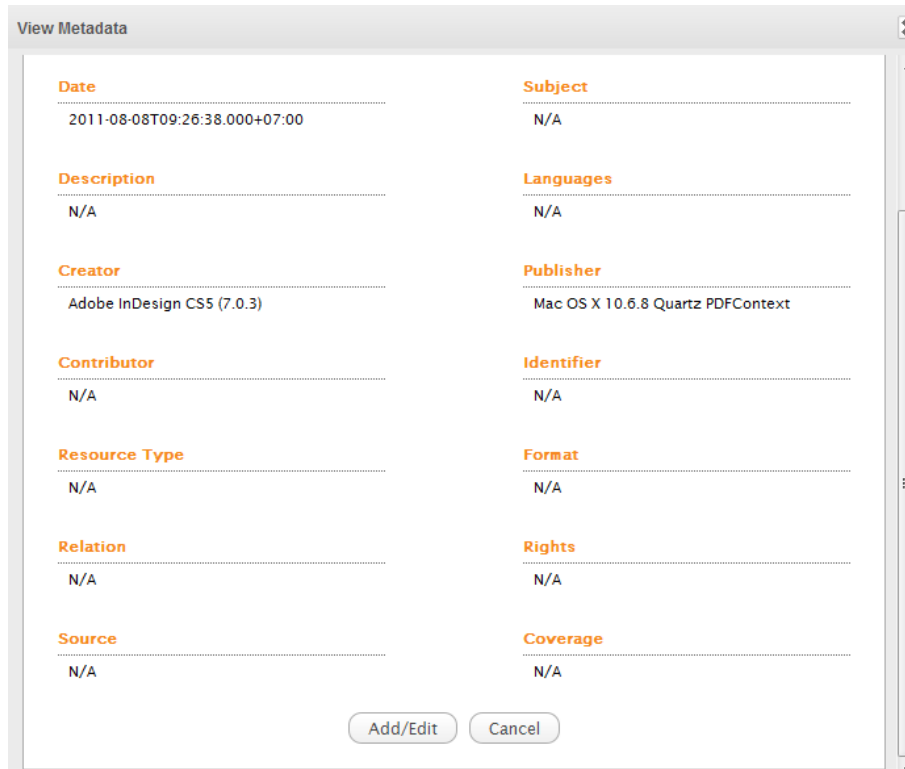
The size of the uploaded file depends on the size limit of the uploaded file that you set up in the 'Edit' mode of **Sites Explorer**. If your file size exceeds the limit, the alert message will appear.

### 5.1.4.26. View metadata

This function allows you to view metadata attached to File nodes, Podcast nodes, File Plan child nodes and uploaded file nodes (**nt:file** nodes).


1. Select an appropriate node (**nt:file**).
2. Click  **Metadata**. The **View Metadata** form appears.

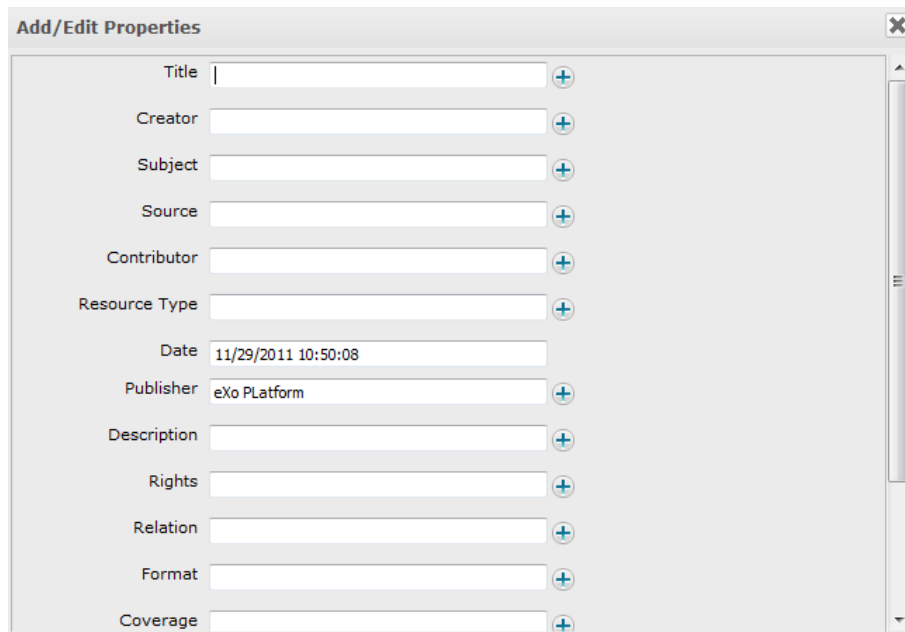




The 'View Metadata' dialog box displays a table of metadata fields and their values. The fields are arranged in two columns. At the bottom, there are 'Add/Edit' and 'Cancel' buttons.

Field	Value
Date	2011-08-08T09:26:38.000+07:00
Subject	N/A
Description	N/A
Languages	N/A
Creator	Adobe InDesign CS5 (7.0.3)
Publisher	Mac OS X 10.6.8 Quartz PDFContext
Contributor	N/A
Identifier	N/A
Resource Type	N/A
Format	N/A
Relation	N/A
Rights	N/A
Source	N/A
Coverage	N/A

- Click the **Add/Edit** button at the bottom of the **View Metadata** form to add metadata.
- Complete the desired fields in the **Add/Edit Properties** form. Click  to add further metadata.




The 'Add/Edit Properties' dialog box shows a list of metadata fields, each with a text input field and a plus icon to the right. The 'Date' field is pre-filled with '11/29/2011 10:50:08' and the 'Publisher' field is pre-filled with 'eXo Platform'.

Field	Value
Title	
Creator	
Subject	
Source	
Contributor	
Resource Type	
Date	11/29/2011 10:50:08
Publisher	eXo Platform
Description	
Rights	
Relation	
Format	
Coverage	

- Click **Save** to accept the new metadata values.

#### 5.1.4.27. View node types

This function allows you to view the detailed information of a node.

- Select a node that you want to view its detailed information.
- Click  **Types** to view detailed information about the selected node.

The Properties Management dialog box displays a table of properties. The table has four columns: Name, Multi Value, Value, and Action. The properties listed include jcr:primaryType, jcr:mixinTypes, jcr:uuid, and several exo: properties like dateCreated, dateModified, index, language, lastModifiedDate, and lastModifier. Each row has a corresponding icon in the Action column (pencil for edit, trash for delete).

Name	Multi Value	Value	Action
jcr:primaryType	false	nt:file	
jcr:mixinTypes	true	exo:datetime; exo:sortable; exo:modifiable; mix:referenceable; exo:ownable; mix:i18n; mix:votable; mix:commentable; exo:rss-enable; publication:authoring; publication:authoringPublication; mix:versionable	
jcr:uuid	false	ed6de0a6c0a801263ef07637c631	
exo:dateCreated	false	2011-11-29T10:46:00.999+07:00	
exo:dateModified	false	2011-11-29T10:46:01.118+07:00	
exo:index	false	1000	
exo:language	false	en	
exo:lastModifiedDate	false	2011-11-29T10:52:15.436+07:00	
exo:lastModifier	false	john	
	false		

3. Click the tabs at the top of the form to view categorized information.

#### 5.1.4.28. View permissions

This function allows administrators to manage the permissions for nodes.

1. Select a node.
2. Click . The **Permission Management** form appears.

The Permission Management dialog box displays a table of permissions for different user groups. The table has six columns: User Or Group, Read, Add Node, Set Property, Remove, and Action. Below the table is a section titled 'Add a permission to that node' with a form to add a new permission.

User Or Group	Read	Add Node	Set Property	Remove	Action
root	true	true	true	true	
*:/platform/administrators	true	true	true	true	
*:/platform/web-contributors	true	true	true	true	
any	true	false	false	false	

**Add a permission to that node**

User Or Group  \*

Read Right ☐

Add Node Right ☐


Set Property Right ☐

Remove Right ☐

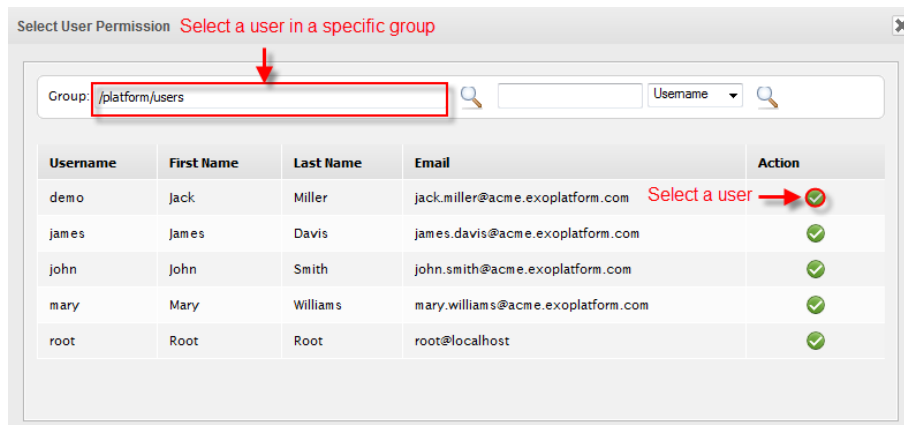
By opening the **Permission Management** form, you can perform the following actions:

- [Add permissions \[305\]](#)
- [Edit permissions \[306\]](#)
- [Delete permissions \[306\]](#)


## Add permissions

1. Select a user or a group to whom you want to assign permissions.
  - Click  next to the **User Or Group** field to add permission for a specific user.

The **Select User Permission** form appears.




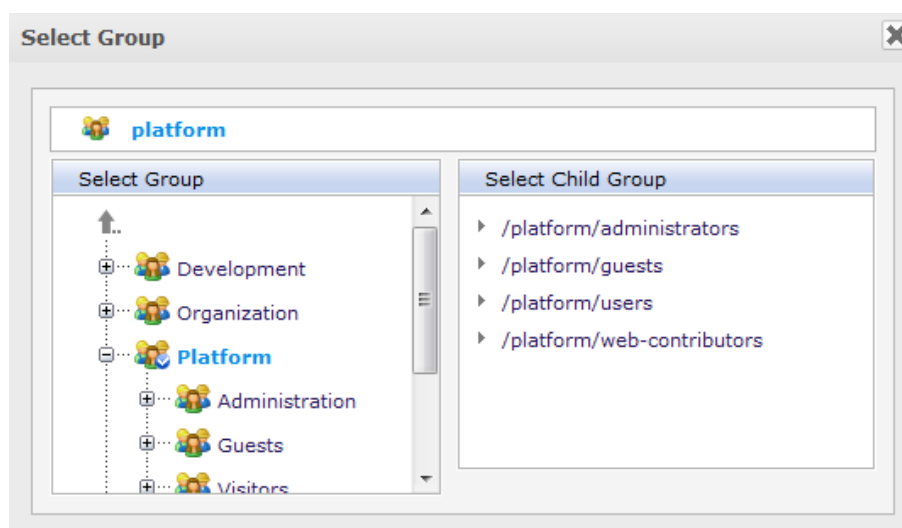
Username	First Name	Last Name	Email	Action
demo	Jack	Miller	jack.miller@acme.exoplatform.com	Select a user → ✓
james	James	Davis	james.davis@acme.exoplatform.com	✓
john	John	Smith	john.smith@acme.exoplatform.com	✓
mary	Mary	Williams	mary.williams@acme.exoplatform.com	✓
root	Root	Root	root@localhost	✓

Click  corresponding to your desired user. Also, you can use the **Search** function to look for your desired users quickly.



### Search for users

#### Search for a user in a specific group


- Enter a group name in the **Group** field at the top of the form (for example, **/platform/users**). Then press **Enter**. All users in the nominated group will be displayed.
- Or, click  beside the **Group** field to open a form that lists groups and their sub-groups. Select a sub-group and all users of the sub-group will be displayed.




#### Search for a user in any groups by Username, First Name, Last Name, or Email

- Enter the information of the user into the textbox.
- Click  to search for users matching with your selected information.
- Click  next to the **User Or Group** field to add permissions based on memberships.


Then, select a group in the left pane, and membership types in the right pane in the **Select Membership** form.

- Click  next to the **User Or Group** field to assign the "read" permission to all users/groups.
2. Select the permission you want to grant the selected users or groups by ticking the corresponding checkboxes beside rights you want to add.
  3. Click **Save** to accept your changes. The new permissions will appear in the permissions table above.

#### Edit permissions


1. Select the permission of a user or a group in the permissions table.
2. Click .
3. Change the permissions as desired.
4. Click **Save** to accept your changed permissions.

#### Delete permissions

1. Select the permission of a user or a group in the permissions table.
2. Click .
3. Click **OK** in the confirmation message to remove the permission.

### 5.1.4.29. View properties

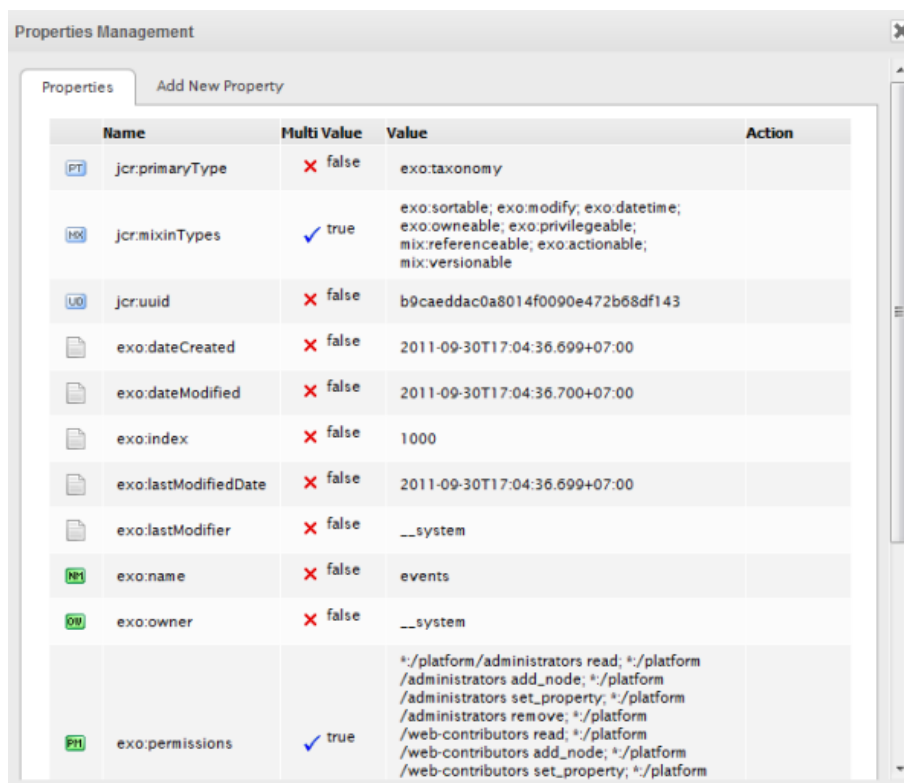
This function allows users to review all the properties and values of a node. It can also be used to add values to a node.

1. Select the node you want to review or add values to.
2. Click  **Properties** to show the **Properties Management** form.

This form has two tabs:

#### Properties

This tab displays all properties and values for the selected node.

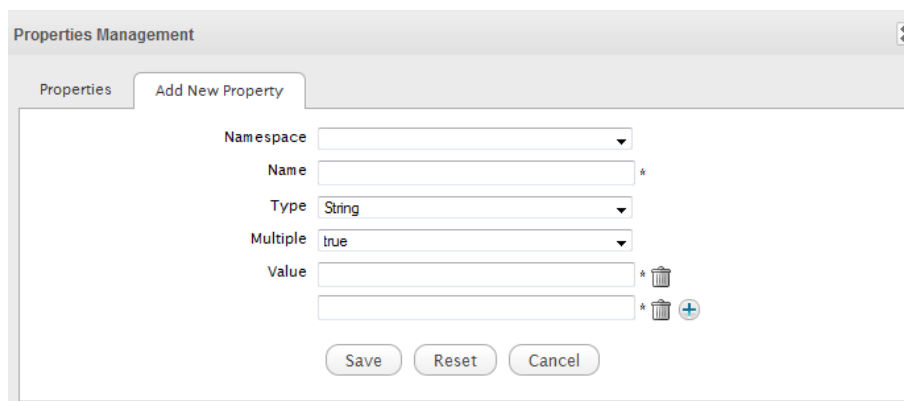


The screenshot shows the 'Properties Management' window with the 'Properties' tab selected. It displays a table of properties for a selected node. The table has four columns: Name, Multi Value, Value, and Action. The properties listed are:

Name	Multi Value	Value	Action
jcr:primaryType	false	exo:taxonomy	
jcr:mixinTypes	true	exo:sortable; exo:modify; exo:datetime; exo:ownable; exo:privilegeable; mix:referenceable; exo:actionable; mix:versionable	
jcr:uuid	false	b9caeddac0a8014f0090e472b68df143	
exo:dateCreated	false	2011-09-30T17:04:36.699+07:00	
exo:dateModified	false	2011-09-30T17:04:36.700+07:00	
exo:index	false	1000	
exo:lastModifiedDate	false	2011-09-30T17:04:36.699+07:00	
exo:lastModifier	false	__system	
exo:name	false	events	
exo:owner	false	__system	
exo:permissions	true	*/platform/administrators read; */platform /administrators add_node; */platform /administrators set_property; */platform /administrators remove; */platform /web-contributors read; */platform /web-contributors add_node; */platform /web-contributors set_property; */platform	

### Add New Property

This tab contains fields to add new properties to the selected node.



The screenshot shows the 'Properties Management' window with the 'Add New Property' tab selected. It contains the following fields and controls:

- Namespace:** A dropdown menu.
- Name:** A text input field with an asterisk (\*) indicating it is required.
- Type:** A dropdown menu with 'String' selected.
- Multiple:** A dropdown menu with 'true' selected.
- Value:** A text input field with an asterisk (\*) indicating it is required. Below it is another text input field with a plus (+) icon, suggesting multiple values can be added.
- Buttons:** 'Save', 'Reset', and 'Cancel' buttons at the bottom.

3. Select the **Add New Property** tab to add new properties to the selected node.
4. Select the namespace for the property.
5. Enter a name for the new property in the **Name** field.
6. Select the property type from the **Type** drop-down menu.
7. Enter a value for the property in the **Value** field.

To add multiple new values, click and repeat the above steps.

To remove a value, click .

8. Click **Save** to accept your new values, or **Reset** to clear all modified fields.


After you have made changes on new properties, you will be returned to the **Properties** tab. The newly added values will be displayed.

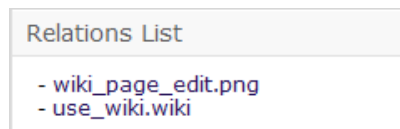
In this form, you can edit a property by clicking , or delete it by clicking .

### 5.1.4.30. View a relation

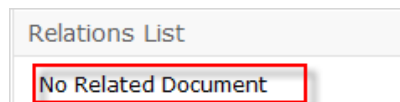
This function shows/hides documents related to a selected node.

- **View a relation**

Select a node, then click  **Show/Hide Relations**. Documents related to the selected node will be shown in the **Filter** bar.



If the node does not have any related documents, the message **No Related Document** will appear instead.




- **Hide relations**

Click  **Show/Hide Relations** again to hide relations.


### 5.1.4.31. Vote for a document

This function is used to vote for a document.

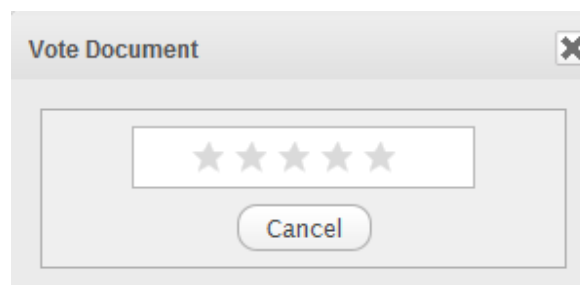


**Note**

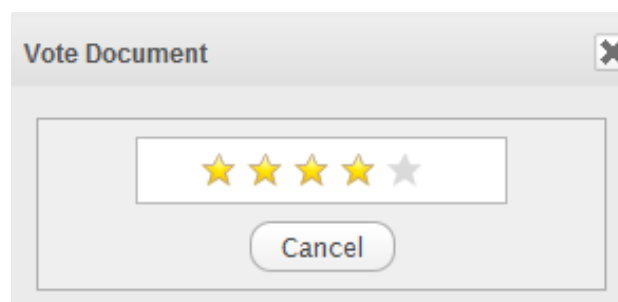
You cannot vote for a **File Plan** document.

1. Open the document you want to vote for.
2. Click  **Vote** on the **Action** bar.

The **Vote Document** form will appear.



3. Rate the document by clicking the appropriate star level.



After a vote has been added, the rating will appear at the bottom of the document:


Avg. Rating: 4.0 Votes: 1



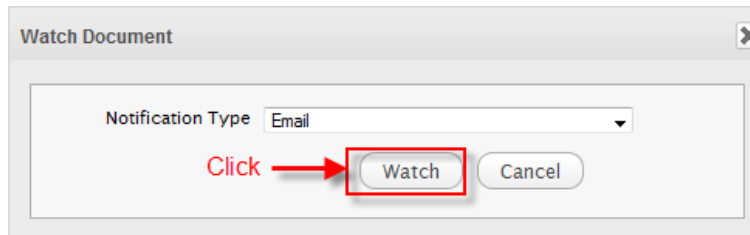
### 5.1.4.32. Watch/Unwatch documents

By using this function, whenever any change is made on the document, a notification message will be sent to your email address. To receive that email, you must configure in your mail server.


#### Watch a document

Select the document you want to watch and click  Watch/Unwatch.

The **Watch Document** form will appear. Click the **Watch** button to finish.

A dialog box titled "Watch Document" with a close button (X) in the top right corner. Inside the dialog, there is a "Notification Type" dropdown menu currently set to "Email". Below this, there are two buttons: "Watch" and "Cancel". A red arrow points to the "Watch" button, with the word "Click" written in red text next to it.

#### Stop watching a document

Select the document and click  Watch/Unwatch.

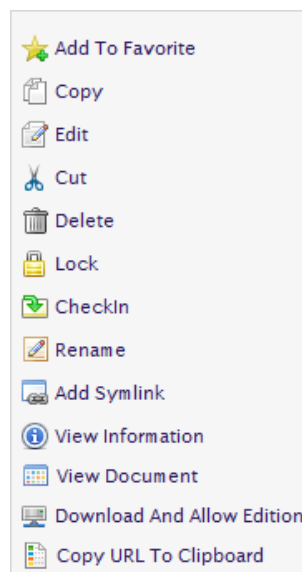
A message will appear to confirm the action.

### 5.1.5. Actions on folders and documents

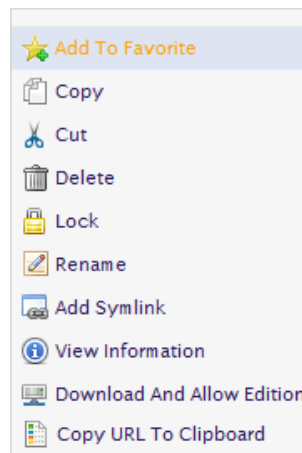
This section represents actions on folders and documents through the right-click menu (Adding to favorites, copying, cutting, pasting, adding Symlink, locking/unlocking, viewing/renaming/downloading document, and allowing edition and copying URL to clipboard) and other actions (dragging and dropping folders or documents).

Depending on the actions on folders or documents, the right-click menu (drop-down menu) will be different.

- **Actions in the right-click menu for documents:**




- **Actions in the right-click menu for folders:**



### 5.1.5.1. Add to favorites

This function helps users easily add nodes (documents, folders or files) as favorite.

1. Right-click a node you want to add as a favorite.
2. Click  **Add To Favorite** from the drop-down menu.

A symlink of your favorite nodes (folders, documents, files) will be created in the **Favorite** folder.

### 5.1.5.2. Copy/Paste & Cut/Paste

This function is used to make a copy of a node (including sub-nodes) to other places.

There are two ways to cut/copy & paste the node:

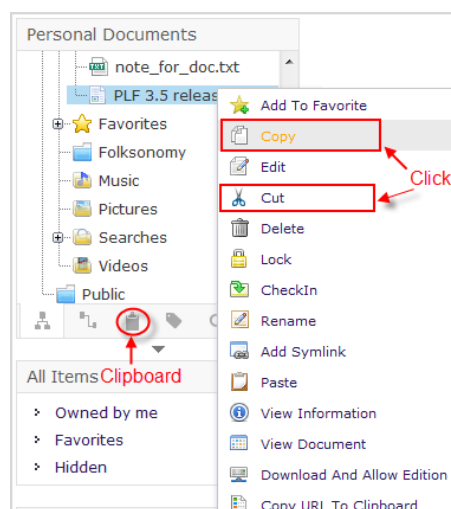
#### The first way

1. Right-click the node, then select **Copy** or **Cut** from the drop-down menu.
2. Right-click a destination node that you want to be the parent node of the copied/cut node, then select **Paste** from the drop-down menu. Note that the **Paste** function is enabled in the menu only after selecting the **Copy/Cut** action.

The copied/cut folder (and its sub-folders) will be pasted into the new selected path.

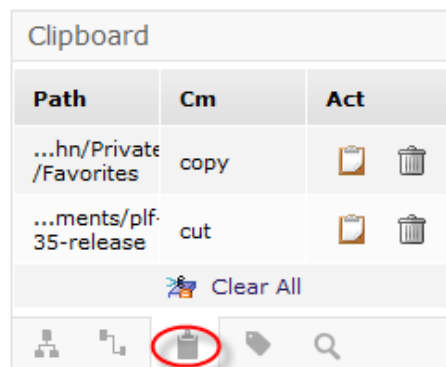
#### The second way



1. Right-click the node and select **Copy/Cut** from the drop-down menu.
2. Select the destination node that you want to be the parent node of the copied node.
3. Select the *Clipboard* icon on the **Filter** bar.





The **Clipboard** window will appear.



4. Click  in the clipboard window to paste the copied/cut node into the selected destination node in Step 3.
  - You can click  to delete a specific waiting statement.
  - You can also click the **Clear All** link to delete all waiting statements in the list.
  - After the action has been taken, a confirmation message will appear with detailed information about the destination path.



#### Note

You only can take the **Copy** action if you have this right on the source node.

You only can take the **Paste** action if you have the right on the destination node.

If the destination node has the same name with the copied node, after being pasted, an index will be added to the name of the pasted node, for example *Live* and *Live[2]*.

You cannot copy a content folder into a document folder.

After taking the **Copy** action, you can take the **Paste** action on different nodes before taking another **Copy** action.

### 5.1.5.3. View/Edit document

#### View a document

The **View Document** item is visible in the drop-down menu when you right-click a document. This function allows you to view the document on another tab with the link containing the document path.

To view a document, simply right-click it, and select **View Document** from the drop-down menu. The document is opened in another tab.

#### Edit a document

To edit a document, refer to the [Edit web content \[359\]](#) section.

### 5.1.5.4. Delete folders and documents

This function helps you remove folders/documents from their locations easily. Do the same steps as in the [Delete web content \[360\]](#) section.




#### Note

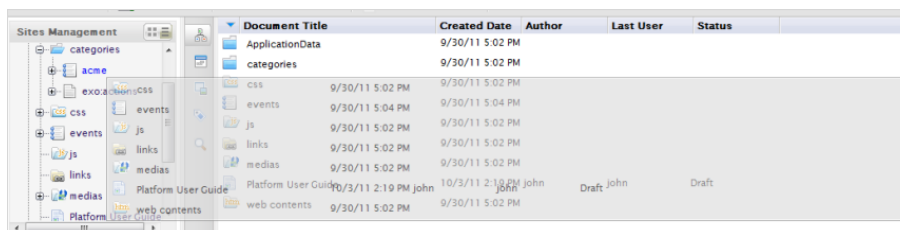
You can only take the **Delete** action if you have the right on a node.

If the deleted node contains sub-nodes, these sub-nodes will be deleted, too.

### 5.1.5.5. Drag and drop folders and documents

This function allows you to move folders/documents from a current location to another one by using the drag and drop feature.

1. Hover your cursor over folders/documents in the right pane, or hold the **Ctrl** or **Shift** key to select multiple folders/documents at once until the cursor changes to .
2. Press the left-mouse button and drag the selected folders/documents.



3. Drop them into another folder in either the right or left pane by releasing the left-mouse button. The "dragged" folders/documents will be relocated to the destination folder.

### 5.1.5.6. Lock/Unlock folders and documents

This function is to avoid changes on specific folders/documents and actions by others, during a specific time.

#### Lock folders/documents

Just right-click a folder/document (on either the right or left window pane) and select **Lock** from the drop-down menu. The selected folder/document will be locked.



#### Note

Only users with appropriate rights can lock folders/documents.

After being locked, other users can only view the folders/documents.

The lock will be kept as current for a session only. If the locking user signs out, the node will be unlocked.

Other users can copy the locked node (by using the **Copy/Paste** functions outlined above); however, the original node cannot be removed or altered.

If no action is taken on a locked node within 30 minutes, the lock will be automatically removed.

#### Unlock folders/documents

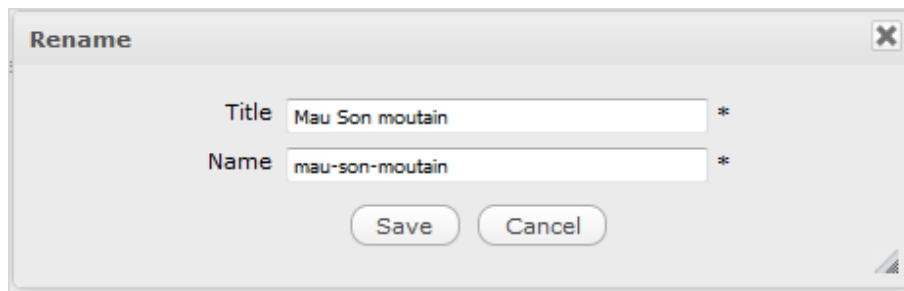
To unlock the locked folder/document, right-click it and select **Unlock** from the drop-down menu. The folder/document will then be unlocked and other users can take actions on it.

### 5.1.5.7. Rename folders and documents

This function is used to change the folder/document name.

1. Right-click a folder/document that you want to rename, then select **Rename** from the drop-down menu.

The **Rename** form will appear.



2. Input a new name in the **Name** field. You can also change the its title by entering a new one in the **Title** field.
3. Click **Save** to accept your changes.

#### 5.1.5.8. Add a Symlink

A symlink embedded into a node allows you to quickly access the node even if you are in other nodes.

To add a symlink, simply right-click a document that you want to add a Symlink, and select **Add Symlink** from the drop-down menu. The symlink will be added to the selected document immediately. To view its content, simply click the symlink.

#### 5.1.5.9. View WebDAV

WebDAV enables users to access files, folders, and read/write documents over the web. Thanks to its benefits of easy, quick and flexible manipulations and time-saving, WebDAV is used to view nodes.

1. Select the path of node you want to view WebDAV or open that folder from the left/right pane.
2. Right-click the node and select **Download And Allow Edition** from the drop-down menu.

With each type of node, the form to view in WebDAV will be different:

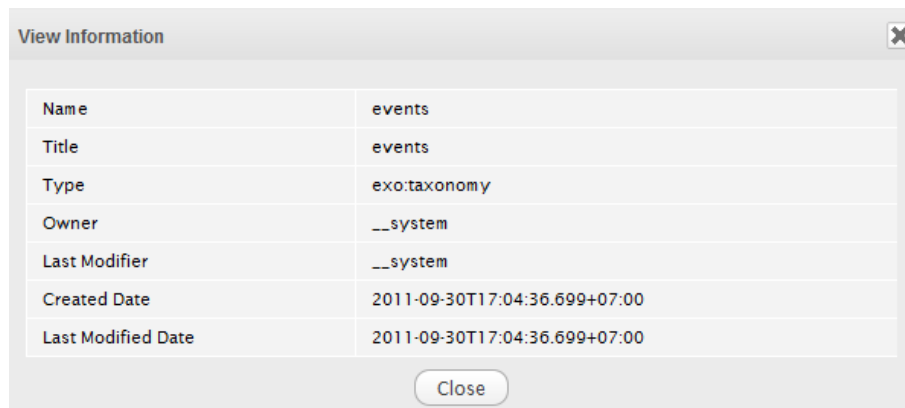
- **Folder**: The sub-nodes list of the current folder will be displayed in WebDAV.
- **nt:file**: The content of the document will be shown.
- **Article**: This node type does not, by default, list any folders. However, if the Article includes actions, added language or other data, all folders will be listed and named; *exo:actions*, *exo:language* and so on.
- **Podcast**: Being viewed in WebDAV, this node type will be attached a form which must be completed to download this document.
- **Sample Node**: This node lists folder names as *exo:images*. Like **Article**, if the **Sample Node** contains actions or added languages, folders will be named as *exo:actions*, *exo:language*, and more.
- **File Plan**: This node behaves the same way as **Article** and **Sample Node**.
- **Kofax**: This node behaves the same way as **Article** and **Sample Node**.

#### 5.1.5.10. View information

eXo Platform supports you to view all information of a document, such as name, title, creator, and publication state of the document.

To view information of a document, simply right-click the document, and select **View Information** from the drop-down menu.

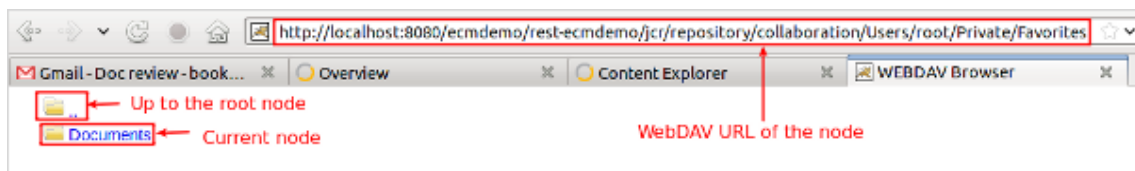
The **View Information** form appears as below.



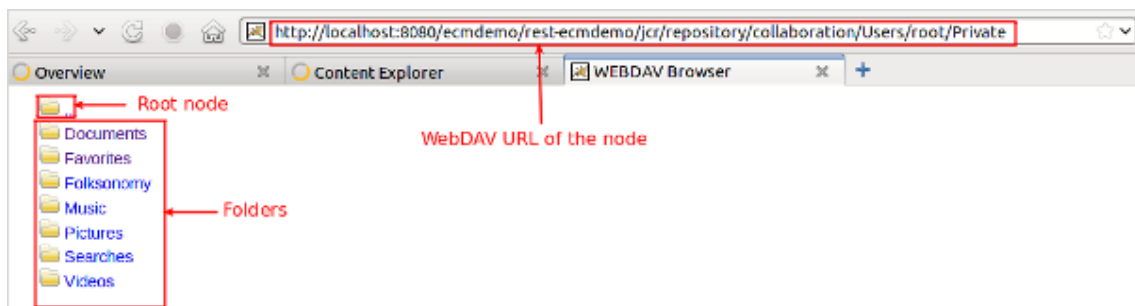
### 5.1.5.11. Copy a URL to the clipboard

The **Copy URL To Clipboard** enables you to copy the WebDAV URL of a selected folder or a document. You then can view it with the WebDAV view on a browser.

1. Right-click a folder/document, and select **Copy URL To Clipboard**.
2. Paste the URL on another tab.




You can view the folders of the node you copied its URL or download documents to your computer. You also view other nodes by clicking ... above the current folder to go up the root node as below.

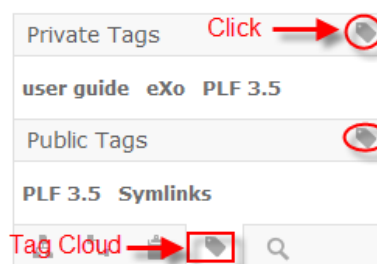


### 5.1.5.12. Manage tags

Tags are easily managed by editing or deleting them with the **Tag Manager**.

#### Edit a tag

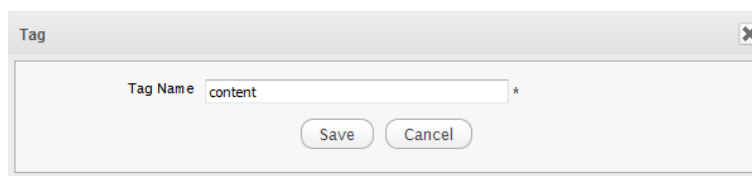
1. Click **Tag Cloud** on the **Filter** bar, then click  at the upper-right corner of the tags pane.



The **Edit Tag** form will appear.



- Click that corresponds to the tag you want to edit.
- Edit the tag to your desires.



- Click **Save** to accept your changes.

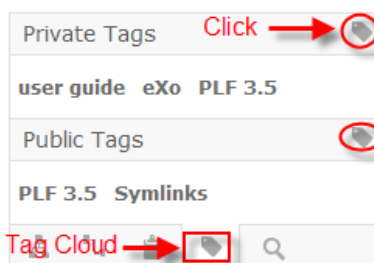
### Delete a tag

- Do [Step 1 \[314\]](#) from the procedure above.
- Click .
- Click **OK** in the confirmation message to delete the tag.

### Use your created tags

- Click .

You will see all existing tags which are listed and classified by private or public tags.



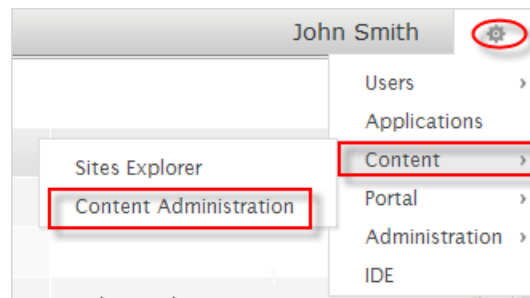
Depending on the popularity of tag, the display of each tag will be different from others by font-size, font-weight, color, font-family, and text-decoration. For example, when a tag is added to over 10 documents, it will be displayed in red color, size:20px, bold. This can also be configured in the [Manage Tag](#) tab.

- Each tag is similar to a link listing all documents to which it is added. To display the documents list in the right pane, click a tag name.

## 5.1.6. Content Administration

This page is used to manage all workspaces, drives, node types, metadata, templates, queries, and more. Only administrators can access the **Content Administration** page.

To access the **Content Administration** page, hover your cursor over --> **Content** --> **Content Administration** on the **Administration** bar.



The **Content Administration** page will appear.

Manage ECM Main Functions

Categories & Tags

Manage Categories

Manage Tags

Content Presentation

Content Types

Advanced Configuration

Manage Categories

Name	Workspace	Home Path	Permissions	Action
System	dms-system	/exo:ecm /exo:taxonomyTrees /storage /System	...erty;__system remove	
acme	collaboration	/sites content /live /acme /categories /acme	...erty;__system remove	
events	collaboration	/sites content /live /acme /events	...erty;__system remove	
intranet	collaboration	/sites content /live /intranet /categories /intranet	...erty;__system remove	
default	collaboration	/sites content /live /default /categories /default	...erty;__system remove	

Add Category Tree

From this page, you can access:

- **Categories & Tags:** Manage categories and tags.
- **Content Presentation:** Manage template, metadata, views, and drives.
- **Content Types:** Manage namespace registry, and nodetype.
- **Advanced Configuration:** Manage queries, scripts, and create an action type.

### 5.1.6.1. Tags

The **Manage Tags** function enables you to manage tag styles. The tag styles will change, depending on the number of documents in a tag.

By selecting **Categories & Tags --> Manage Tags**, you will be directed to the **Manage Tags** page as below:

Manage ECM Main Functions

Categories & Tags

Manage Categories

Manage Tags

Content Presentation

Content Types

Advanced Configuration

Manage Tags

Tag Manager

Tag Permission Manager

Style Name	Document Range	Tag Style	Action
normal	0..2	font-size: 12px; font-weight: bold; color: #6b6b6b; font-family: verdana; text-decoration: none;	
interesting	2..5	font-size: 13px; font-weight: bold; color: #5a66ce; font-family: verdana; text-decoration: none;	
attractive	5..7	font-size: 15px; font-weight: bold; color: blue; font-family: Arial; text-decoration: none;	
hot	7..10	font-size: 18px; font-weight: bold; color: #ff9000; font-family: Arial; text-decoration: none;	
hottest	10..*	font-size: 20px; font-weight: bold; color: red; font-family: Arial; text-decoration: none;	

Add a new tag

Add Style

### 5.1.6.1.1. Add a tag style

1. Click **Add Style**. The **Edit Tag Style Configuration** form will appear.

The screenshot shows a dialog box titled "Edit Tag Style Configuration". It has three input fields: "Style Name" with the value "normal", "Document Range" with the value "0..2", and "HTML Style" with the value "font-size: 12px; font-weight: bold; color: #6b6b6b; font-family: verdana; text-decoration: none;". Each field has an asterisk (\*) indicating it is required. At the bottom of the dialog are two buttons: "Update" and "Cancel".

#### Details:

Field	Description
<b>Asterisk (*)</b>	This mark next to each field means that it is required to input values.
<b>Style Name</b>	Give the tag name which cannot be edited.
<b>Document Range</b>	Give the number of document assigned to a tag.
<b>HTML Style</b>	Include font-size, font-weight, color, font-family, and text-decoration.

2. Input values in the fields: **Style Name**, **Document Range**, and **HTML Style**.
3. Click **Update** to accept adding a new tag style.



#### Note


The format of valid range must be: a..b where 'a', 'b' are positive integers. You can use \* instead of 'b' to indicate it is unlimited. For example, 0..2 (means 0-2 documents assigned to a tag), 10..\* (means at least 10 documents assigned to a tag).

The 'HTML style' textbox cannot be empty. You can change values of font-size, font-weight, color, font-family, and text-decoration.

### 5.1.6.1.2. Edit/Delete a tag style

#### Edit an existing tag

The **Tag Manager** tab enables you to edit the existing tags.

1. Click  corresponding to the tag name which you want to edit in the **Action** column to edit the tag style configuration. The **Edit Tag Style Configuration** form appears which is similar to that of adding a tag style.
2. Change values in the fields, including **Document Range** and **HTML Style**, except **Style Name**.
3. Click **Update** to save new changes.

#### Delete a tag style

To delete one tag style, simply click the corresponding **Delete** icon and select **OK** in the confirmation to accept your deletion.

### 5.1.6.1.3. Set permissions on public tags

The Tag Permission Manager tab helps you set permissions regarding to editing and deleting public tags.

**Manage Tags**

Tag Manager Tag Permission Manager

Memberships	Action
*/platform/administrators	

**Add Permission**

Memberships:  \* ← Select membership

Save

#### Set Permission To Tag Management

1. Click beside the **Memberships** field to select memberships to add a permission to those memberships. The **Select Membership** form will appear.

Select Membership

**Select Group**

- ↑
- developers
- organization
- platform
- sandbox
- spaces

**Select Membership**

- member
- author
- editor
- manager
- redactor
- validator
- \*

2. Select a group on the left and the corresponding membership on the right. The selected membership will appear in the **Memberships** field.
3. Click **Save** to accept adding a permission for the membership to the **Memberships** column.

**Manage Tags**

Tag Manager Tag Permission Manager


Memberships	Action
*/platform/administrators	
member:/developers	← Delete membership

**Add Permission**

Memberships:  \*

Save













You can also delete memberships that have permissions by clicking  regarding to that membership, then click **OK** in the confirmation message.

### 5.1.6.2. Categories

A category can be understood as a classification practice and science. It is used to sort documents, aiming at facilitating searches. The category management includes adding, editing and deleting a category tree.

By selecting **Categories & Tags --> Manage Categories**, you will be directed to the **Manage Categories** page as below:

Manage Categories				
Name	Workspace	Home Path	Permissions	Action
System	dms-system	/exo:ecm /exo:taxonomyTree /storage /System	...erty;__system remove	 
acme	collaboration	/sites content /live /acme /categories /acme	...erty;__system remove	 
events	collaboration	/sites content /live /acme /events	...erty;__system remove	 
intranet	collaboration	/sites content /live /intranet /categories /intranet	...erty;__system remove	 
default	collaboration	/sites content /live /default /categories /default	...erty;__system remove	 
<div> Add Category Tree </div>				

← Add a new category tree

#### 5.1.6.2.1. Add a category tree

1. Click the **Add Category Tree** button to add a new category. The **Add Category Tree** form will appear.

Add Category Tree

Specify the category name, workspace and home path.


Name
Platform

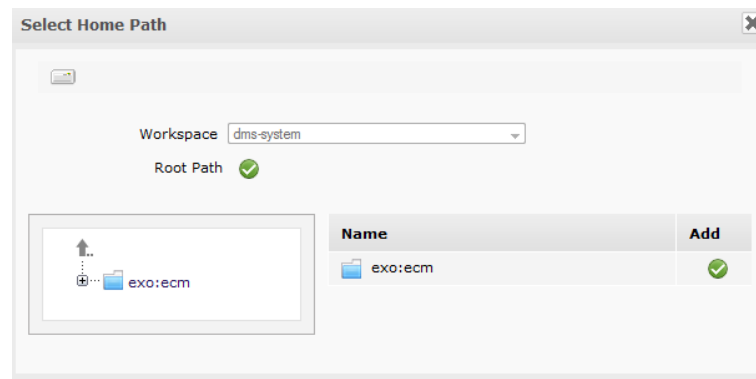
Workspace
dms-system

Home Path
/

Reset
Next
Close

← Click to next step

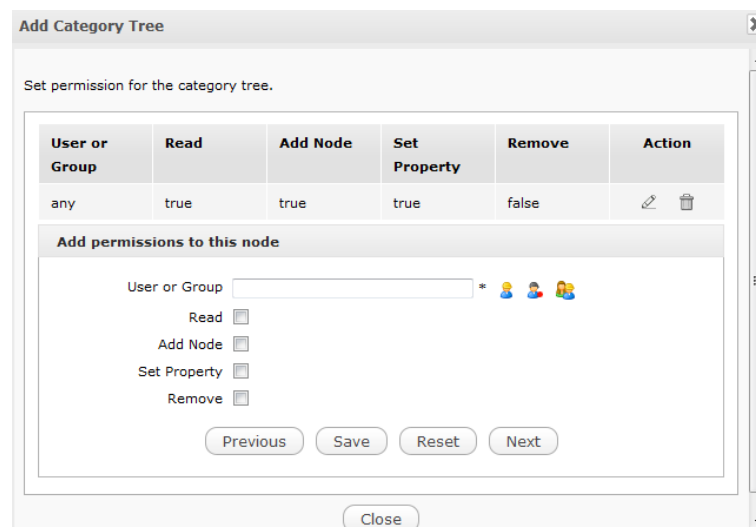
2. Enter the category tree name in the **Name** field which is required.
3. Select the workspace you want to work with.
4. Select the home path by clicking . The **Select Home Path** form will appear.



- Click next to **Root Path** if you want to select the root path or;
- Click the arrow icon to go to the up level path and click the plus sign to expand the folder in the left pane.

Click corresponding to the path that you want to select as a home path.

5. Click **Reset** if you want to reset values that have just been selected or **Next** to select permissions for a category tree.



- i. Click to select a user or to select memberships or to select everyone to set permissions. The user or membership that you have just selected will be displayed in the **User or Group** field.
- ii. Check at least one of these below options to set rights for the selected user to membership:

Field	Description
<b>Read Right</b>	Select the <b>Read</b> right or not.
<b>Add Note Right</b>	Select the <b>Add Node</b> right or not.
<b>Set Property Right</b>	Select the <b>Set Property</b> right or not.
<b>Remove Right</b>	Select the <b>Remove</b> right or not.

6. Click **Save** to save all values, or **Reset** to change values that have just been set. After clicking **Save**, click **Next** to go to the next step.

7. Enter the name for an action of the category tree in the **Name** field which is required.
8. Select values for **Lifecycle**, **Node Types**, **Target Workspace**, **Target Path**, **Affected Node Types** which are required.
9. Click **Save** to save all values, then select **Next** to go to the next step.




### Note


Do not input some special characters into the **Name** field, such as: !, @, #, \$, %, &, \*, (, ).

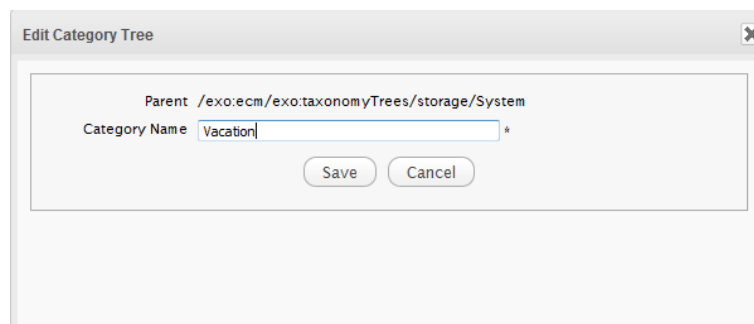
Do not add a category which has the same name and level with existing taxonomies in a node.

The category name must contain less than 30 characters.

### 5.1.6.2.2. Edit a category tree

1. Click  corresponding to the category tree you want to edit.

2. Click  in the **Add** column to add more category trees. The **Edit Category Tree** form will appear.




Parent /exo.ecm/exo.taxonomyTrees/storage/System

Category Name  \*

3. Enter a category name in the **Category Name** field which is required.
4. Click **Save** to save the category name.
5. Click **Previous** to return to the previous steps.
6. Click **Save** to save all changes, or **Previous** or **Next** if you want to edit more.



### Note

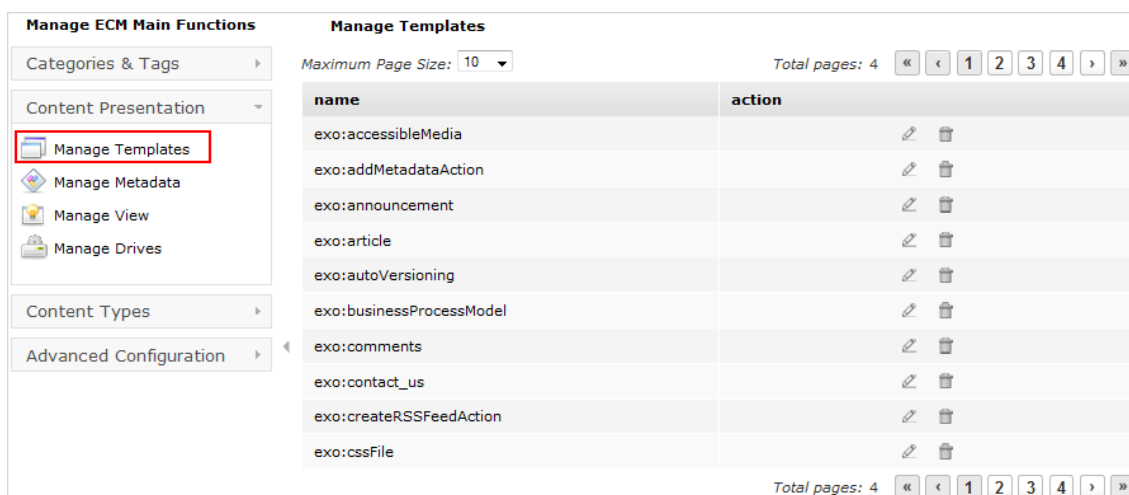
You can delete a category by clicking  corresponding to the category that you want to delete. Click **OK** in the confirmation message to accept your deletion.

You cannot delete categories that have been referenced.





















## 5.1.6.3. Content Presentation

### 5.1.6.3.1. Manage a template

When creating a node in eXo Platform, you must set its properties. Thus, each node needs to have a form to enter data for their properties (called the **Dialog** template), and display the existing values (called the **View** template). The template management allows users to view, delete and modify the predefined templates or to add a new template.





The interface shows the 'Manage ECM Main Functions' sidebar with 'Content Presentation' expanded and 'Manage Templates' selected. The main area displays a table of templates with columns 'name' and 'action'.

name	action
exo:accessibleMedia	 
exo:addMetadataAction	 
exo:announcement	 
exo:article	 
exo:autoVersioning	 
exo:businessProcessModel	 
exo:comments	 
exo:contact_us	 
exo:createRSSFeedAction	 
exo:cssFile	 


### Add a new template

1. Click **Content Presentation --> Manage Templates**.
2. Click **Add** in the **Manage Templates** form to open the **Template Form**.

3. Select the template type from the **Name** drop-down menu.
4. Specify a name for the template in the **Label** field. It is required.
5. Select the **is Document Template** checkbox if you want your created template to become a template for a document.
6. Click  next to the **Permission** field to open the **Select Permission** dialog. It is required.
  - Select the group from the left pane and the membership from the right pane;
  - Or, you can set permissions for everyone by clicking  next to **Any Permission**.

7. Optionally, select the **Dialog** tab and enter the value in the **Dialog Content** field.
8. Optionally, select the **View** tab and enter the value in the **View Content** field.
9. Optionally, select the **CSS** tab and enter the value in the **CSS Content** field.
10. Click **Save** to create the template.


### Edit a template

1. Click **Content Presentation --> Manage Templates**.
2. Click  in the **Action** column, corresponding to the template you want to edit.
3. Make changes on the values of each tab, including:
  - In the **Template** tab, you can edit the label of the template.
  - In the **Dialog** tab, you can do the followings:


#### Add a dialog

- i. Input content for this dialog in the **Content** field.
- ii. Input the name for this dialog that is required.
- iii. Select permissions for a group that can use this dialog that is required.

### Edit an existing dialog

- i. Click  in the dialog row you want to edit.
- ii. Edit the dialog properties.
- iii. Click **Save** to accept all changes in the **Dialog** tab.

### Delete an existing dialog

- i. Click  in the dialog row you want to edit.
- ii. Click **OK** to accept your deletion.



#### Note


You cannot delete the default dialog. You must create a new one before you can delete the current default dialog.

- In the **View** tab, you can do the followings:

### Add a view

- i. Enter content into the **Content** field.
- ii. Input name for this view that is required.
- iii. Select permissions for a group that can use this view that is required.

### Edit an existing view

- i. Click  in the **Actions** column, corresponding to the view you want to edit.
- ii. Edit the view properties.
- iii. Click **Save** to accept all changes in the **View** tab.




#### Note

You cannot change the view name.


If you click **is Enable Version** checkbox, this view automatically increments one version after you have clicked **Save**. It is displayed at **Version** column in the **View** tab.

If the dialog has at least two versions, in the **View** tab, it displays the **Restore** button. You can use **Restore** to roll back to the previous View.

### Delete an existing view

- i. Click  in the **Actions** column, corresponding to the view you want to delete.
- ii. Click **OK** to accept your deletion.
- iii. Click **Save** to accept all changes.

### Delete a template























































1. Click  corresponding to the template you want to remove in the **Manage Templates** page.
2. Click **OK** in the confirmation message to accept your deletion.


### 5.1.6.3.2. Manage metadata

Metadata is generally defined as "data about data". Metadata is information which describes, or supplements the central data. In the **Manage Metadata** tab, you can manage nodes in the metadata format in the eXo Platform system. The metadata may be considered as information used to describe the data. When data are provided to end-users, the metadata allows users to understand about information in more details. All metadata nodes can combine with other nodes to create a new node (add mix).















#### View metadata

1. Click **Content Presentation --> Manage Metadata**.

Manage ECM Main Functions		Manage Metadata				
Categories & Tags		Maximum Page Size: 10				
Content Presentation						
Manage Templates						
<b>Manage Metadata</b>						
Manage View						
Manage Drives						
Content Types						
Advanced Configuration						
Icon	Metadata Name	Internal Use		Mixin Type		Template's Actions
	dc:elementSet		false		true	  
	metadata:siteMetadata		false		true	  
	rma:accessionable		true		true	  
	rma:cutoffable		true		true	  
	rma:destroyable		true		true	  
	rma:holdable		true		true	  
	rma:record		true		true	  
	rma:transferable		true		true	  
	rma:vitalRecord		true		true	  

2. Click  corresponding to the metadata you want to view.

The **Metadata Information** form will open.

Metadata Information			
Metadata Information			
Metadata Name	Is Mixin Type		Orderable children
 dc:elementSet		true	 false
Elements			
	Element Name	Type	Description
	dc:coverage	String	Description
	dc:resourceType	String	Description
	dc:creator	String	Description
	dc:description	String	Description
	dc:language	String	Description
	dc:publisher	String	Description
	dc:subject	String	Description
	dc:contributor	String	Description
	dc:source	String	Description
	dc:rights	String	Description
	dc:title	String	Description

#### Edit metadata

1. Click  in the **Template's Actions** column, corresponding to the metadata you want to edit.

The **Edit Metadata's Template** form will open.

2. Change the required properties of the metadata.




#### Note

You cannot edit the metadata name.

3. Click **Apply** to save all metadata changes.

#### Delete metadata

1. Click  corresponding to the metadata you want to delete.
2. Click **OK** in the confirmation message to accept your deletion.

### 5.1.6.3.3. Manage views

The **Manage View** function is used to control view ways of a user. It has 2 tabs: **View** and **ECM Templates**

To open the **Manage View** function, click **Content Presentation** --> **Manage View**. The **Manage View** form displays.

Name	Permissions	Action Tab	Base Version	Action
Admin View	*:/platform /administrators	[ Admin ]		
Authoring View	*:/platform /web-contributors	[ Publication ] [ Collaboration ]		
Cover Flow	*:/platform/users	[ CoverFlow ]		
Icon View	*:/platform/users	[ Icons ]		
List View	*:/platform/users	[ List ]		
Simple View	*:/platform/users	[ Actions ] [ Collaboration ]		
thumbnail view	author:/developers	[ Admin ]		
Timeline View	*:/platform/users	[ Timeline ]		
WCM Category View	*:/platform /web-contributors	[ Publication ] [ Collaboration ]		
WCM View	*:/platform /web-contributors	[ Publication ] [ Collaboration ] [ System ]		

Add View

Here, you can do many actions through 2 tabs:

- [Views tab](#)
- [ECMS Templates tab](#)

#### 5.1.6.3.3.1. Views tab

In this tab, you can add, edit, delete, and preview views.

#### Add a view

1. Click **Add View** located at the bottom of the **Manage View** form.



The **Add View** form will open.

The screenshot shows the 'Add View' dialog box with the 'View Form' tab selected. It includes input fields for 'Name' (marked with an asterisk), 'Permission' (marked with an asterisk and a plus icon), 'Tabs', and 'Templates' (set to 'List View'). At the bottom are buttons for 'Save', 'Reset', 'Cancel', and 'Add Tab'.

2. Specify the view name in the **Name** field that must be unique, and only contains standard alphanumeric characters. It is required.
3. Set permissions for the view by clicking the plus icon. It is required.

The screenshot shows the 'Select Permission' dialog box. It features a search bar at the top, a '+ Any Permission' button, and two main sections: 'Select Group' on the left with a tree view of groups (Development, Organization, Platform, Sandbox, Spaces) and 'Select Membership' on the right.

- Click next to **Any Permission** to assign permission to every one;
  - Or, select a group from the left pane and the membership from the right pane.
4. Click the **Templates** field and select a template from the drop-down menu for this view.
  5. Click **Add Tab** to create a functional tab on this view. It is required.


The screenshot shows the 'Add View' dialog box with the 'Tab Form' tab selected. The 'Name' field is highlighted with a red box and labeled 'The tab name' with a red arrow. Below it is a list of functions with checkboxes. A red arrow points to the 'Add Symlink' checkbox, labeled 'Specify functions on the tab'. The functions listed are: Add Category (checked), Add Document (checked), Add Folder (checked), Add Translation (unchecked), Add Symlink (unchecked), Comment (unchecked), Navigation by Content (unchecked), deleteNode (unchecked), Edit Document (unchecked), Export Node (checked), Import Node (checked), Manage Actions (unchecked), and Manage Auditing (unchecked).

- i. Enter the name for the tab in the **Name** field.
  - ii. Specify functions to add to the tab.
  - iii. Click **Save** to finish creating a tab;
- Or, click **Reset** to clear the **Tab** form;
- Or, click **Back** to return to the **View Form** tab of the **Add View** form.

The newly created tab is displayed on the **Tab**s field.

- Click **Save** to apply all settings and close the form.

### Edit a View

- Click  in the **Action** column, corresponding to the view you want to edit.

- Edit the view properties.



#### Note


You cannot change the view name.

If you select the **Enable Version** checkbox, this view automatically increases to one version after you click **Save**. It is displayed at the **Base Version** column in the **View** tab.

If the dialog has at least two versions, in the **View** tab, it displays the **Restore** button. You can use **Restore** to roll back to the previous View.

- Optionally, click **Add Tab** to open the **Tab Form** tab that allows you to add more Tabs to the View.
- Optionally, click an added **Tab** to add or remove functions on it. Note that you cannot change the tab name.
- Click **Save** to apply all changes in the **View** tab.

### Delete a view


- Click  corresponding to the view you want to delete in the **Manage View** page.
- Click **OK** to delete the view in the confirmation message.



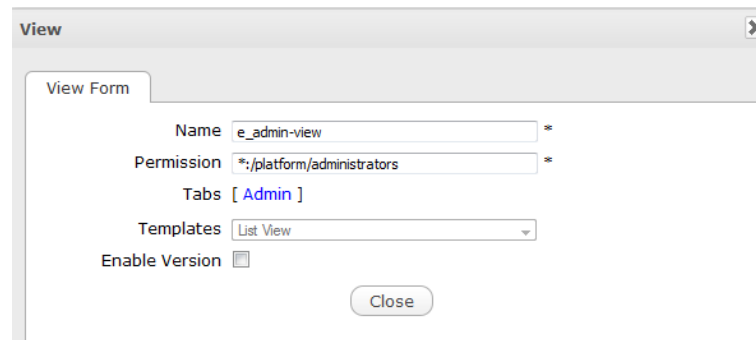
#### Note

You cannot delete a view which is in use.

## Preview a view

1. Click  in the **Action** column of the view you want to preview.

The **View** form will open.



The **View** form is a modal dialog box with a title bar and a close button. It contains the following fields:

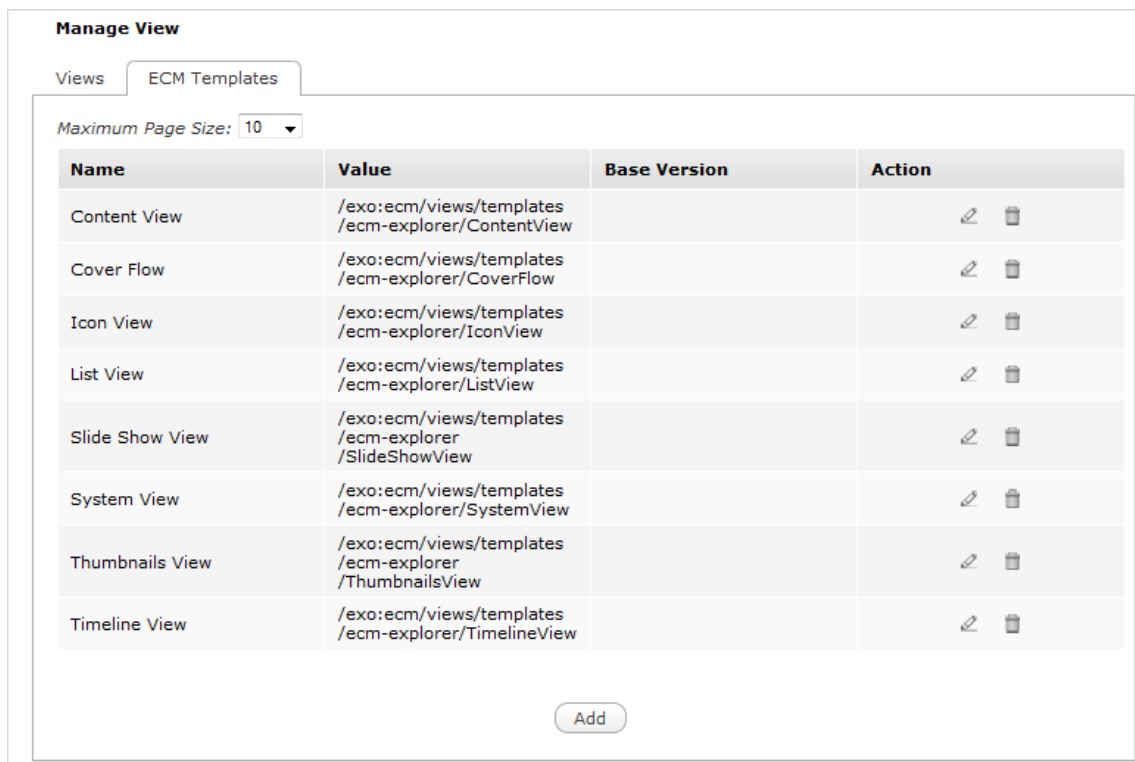
- Name:** e\_admin-view \*
- Permission:** \*/platform/administrators \*
- Tabs:** [ Admin ]
- Templates:** List View (dropdown menu)
- Enable Version:** ☐
- Close** button

2. Click **Close** to exit the **View** form.

















### 5.1.6.3.3.2. ECM Templates tab

#### Add a new ECM Template

1. Select the **ECM Templates** tab.




The **Manage View** dialog box has two tabs: **Views** and **ECM Templates**. The **ECM Templates** tab is selected. It shows a table of templates with the following columns: **Name**, **Value**, **Base Version**, and **Action**. The **Action** column contains edit and delete icons. Below the table is an **Add** button.

Name	Value	Base Version	Action
Content View	/exo:ecm/views/templates /ecm-explorer/ContentView		 
Cover Flow	/exo:ecm/views/templates /ecm-explorer/CoverFlow		 
Icon View	/exo:ecm/views/templates /ecm-explorer/IconView		 
List View	/exo:ecm/views/templates /ecm-explorer/ListView		 
Slide Show View	/exo:ecm/views/templates /ecm-explorer/SlideShowView		 
System View	/exo:ecm/views/templates /ecm-explorer/SystemView		 
Thumbnails View	/exo:ecm/views/templates /ecm-explorer/ThumbnailsView		 
Timeline View	/exo:ecm/views/templates /ecm-explorer/TimelineView		 

2. Click **Add** to open the **Add ECM Template** form.

3. Input the content of the template in the **Content** field.
4. Input a name for the template in the **Name** field.
5. Select a type for the template in the **Template Type** field.
6. Click **Save** to accept adding a new template.

#### Edit a template

1. Click  next to the template you want to edit.
2. Change the current template's properties.
3. Click **Save** to accept all changes.




#### Note

You cannot edit the template name.

If you tick the **Enable Version** checkbox, this template will automatically increase to 1 version after you have clicked **Save**. It is displayed at the **Base Version** column in the **ECMS Template** tab.

If the template has at least two versions, in the **Edit ECM Template** form, it displays **Restore** that allows restoring the template version.

















#### Delete a template

1. Click  corresponding to the template you want to delete.
2. Click **OK** in the confirmation message to accept your deletion.

#### 5.1.6.3.4. Manage drives

The function supports you to manage drives in **Sites Explorer**. It allows adding, editing and deleting drives.

Go to **Content Presentation --> Manage Drives**.

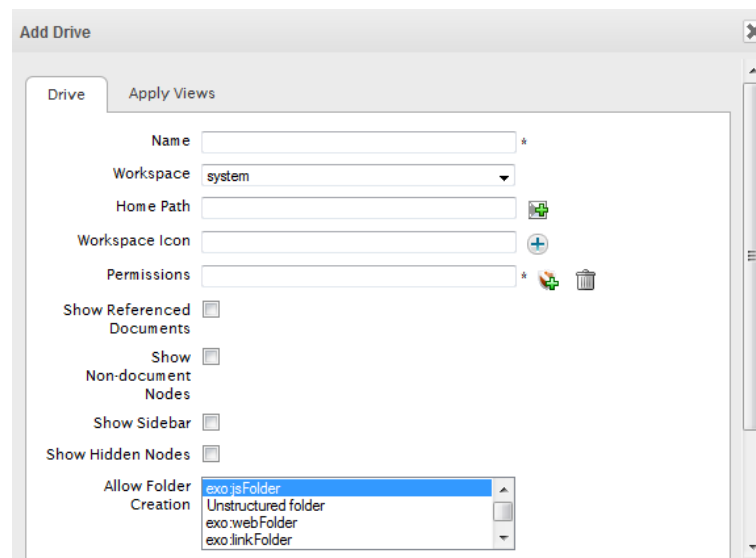
Manage Drives						
Maximum Page Size: 10						
Icon	Name	Workspace	Home Path	Permissions	View	Action
	acme-category	collaboration	/sites content /live /acme /categories /acme	*:/platform /web-contributors	WCM Category View	 
	collaboration	collaboration	/	*:/platform /web-contributors,*; /platform /administrators	Timeline View, Admin View, thumbnail view	 
	DMS Administration	dms-system	/	*:/platform /administrators	Icon View, Simple View, Admin View	 
	Groups	collaboration	/Groups\${groupId}	*:\${groupId}	List View, Icon View	 
	Managed Sites	collaboration	/sites content /live	*:/platform /administrators,*; /platform /web-contributors	WCM View, thumbnail view	 
	Personal Documents	collaboration	/Users /\${userId} /Private	*:/platform/users	List View, Icon View, Admin View	 
	Private	collaboration	/Users /\${userId} /Private	\${userId}	List View, Icon View, Admin View	 
	Public	collaboration	/Users /\${userId} /Public	*:/platform/users	List View, Icon View	 
<div> <div>Add Drive</div> <div>Add a new drive</div> </div>						

Here, you can do certain actions on the drives as follows:

- [Add a new drive](#)
- [Edit a drive](#)
- [Delete a drive](#)

#### 5.1.6.3.4.1. Add a new drive

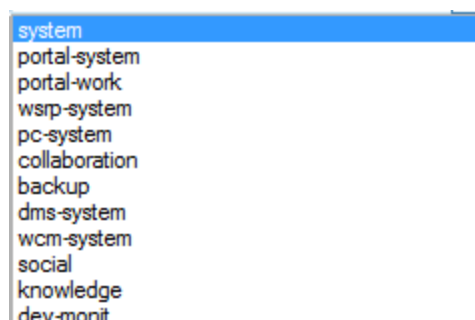
1. Click **Add Drive** in the **Manage Drives** page to open the **Add Drive** form.




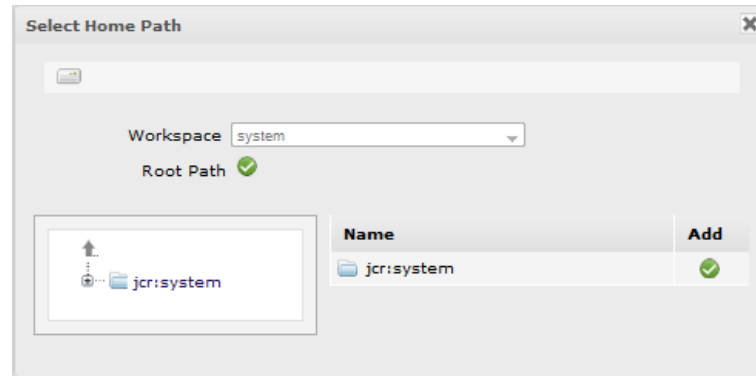
The 'Add Drive' form is displayed with the following fields and options:

- Name:** A text input field with an asterisk indicating it is required.
- Workspace:** A dropdown menu currently showing 'system'.
- Home Path:** A text input field with a folder icon.
- Workspace Icon:** A text input field with a plus icon.
- Permissions:** A text input field with an asterisk, a plus icon, and a trash icon.
- Show Referenced Documents:** A checkbox.
- Show Non-document Nodes:** A checkbox.
- Show Sidebar:** A checkbox.
- Show Hidden Nodes:** A checkbox.
- Allow Folder Creation:** A dropdown menu with options: 'exo.jsFolder' (selected), 'Unstructured folder', 'exo.webFolder', and 'exo.linkFolder'.


2. Input a name for the new drive in the **Name** field that is required.
3. Select a workspace for the drive from the drop-down menu by clicking the **Workspace** entry.

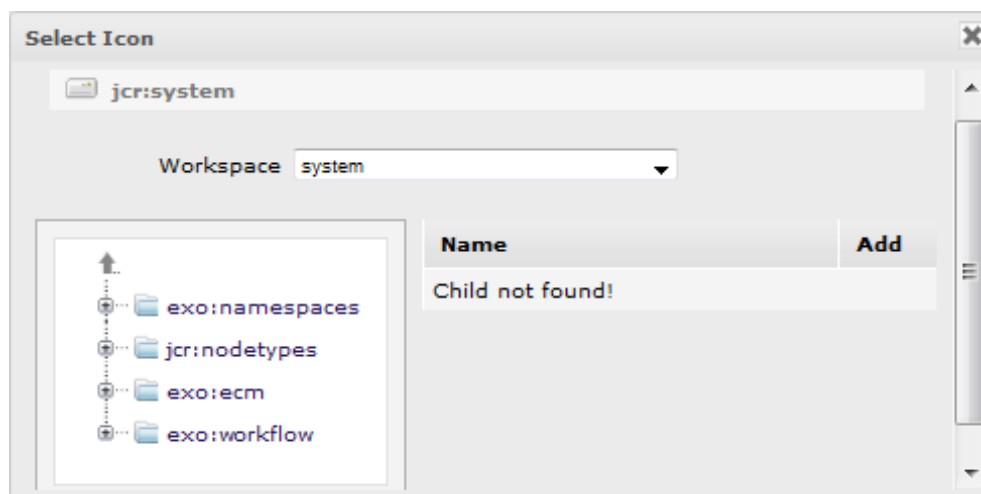



4. Select the home path for the drive by clicking  beside the **Home Path** entry.



5. Browse an icon for the workspace by clicking  beside the **Workspace Icon** entry.

Select an icon by clicking  corresponding to your desired icon file.



6. Select permissions for groups that have access rights to this drive by clicking  beside the **Permissions** entry.
7. Select or deselect the various checkboxes to hide or show the drive elements respectively.

**Show Referenced Document**

Allow viewing preference documents.

**Show Non-document Nodes**

Allow viewing non-documents.

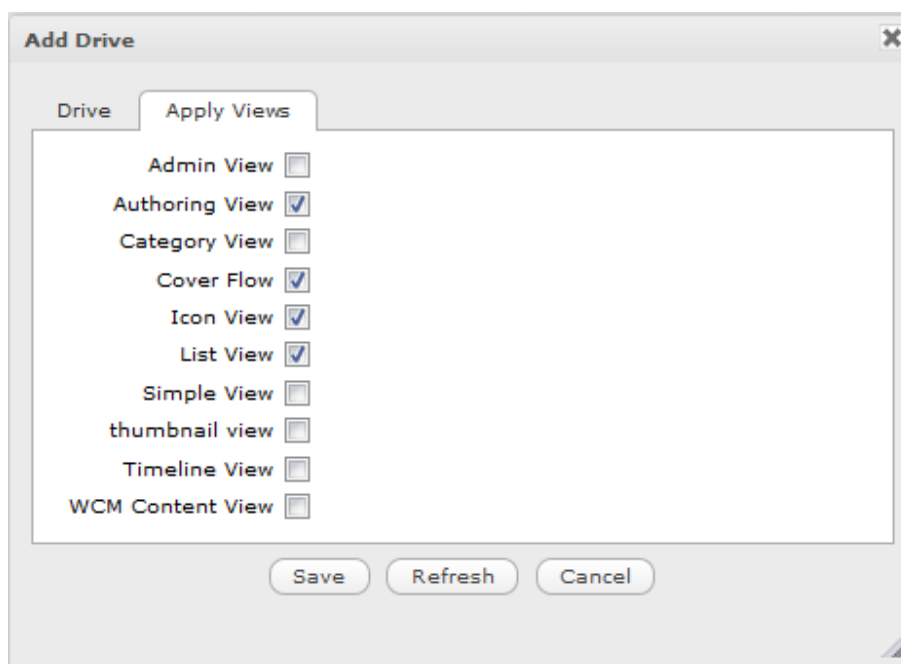
**Show Sidebar**

Allow showing the sidebar.

**Show Hidden Node**

Allow showing the hidden nodes.

8. Select the document type that will be created in this drive.
9. Select the **Apply Views** tab and select the view types you want to be available in the drive.



The 'Add Drive' dialog box has two tabs: 'Drive' and 'Apply Views'. The 'Apply Views' tab is active, showing a list of view options with checkboxes:

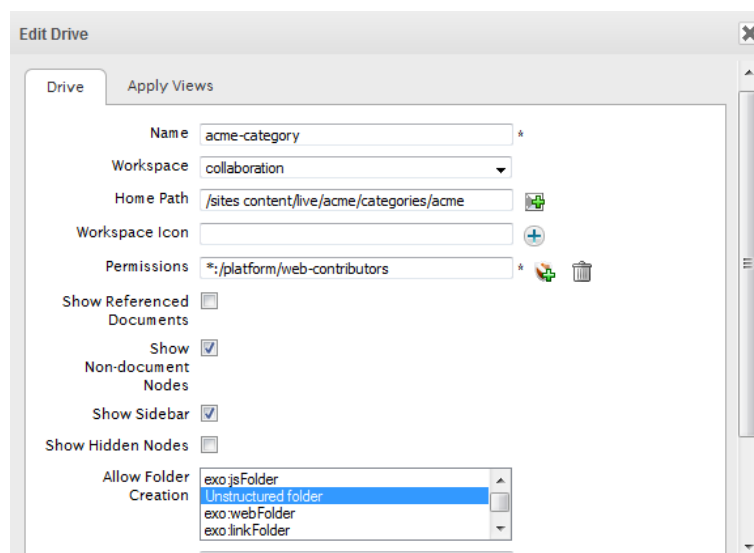
- Admin View ☐
- Authoring View ☒
- Category View ☐
- Cover Flow ☒
- Icon View ☒
- List View ☒
- Simple View ☐
- thumbnail view ☐
- Timeline View ☐
- WCM Content View ☐

At the bottom are three buttons: 'Save', 'Refresh', and 'Cancel'.

10. Click **Save** to complete creating the new drive, or **Refresh** to clear the form.

#### 5.1.6.3.4.2. Edit a drive

1. Click  corresponding to the drive you want to edit. The **Edit Drive** form will appear.



The 'Edit Drive' dialog box has two tabs: 'Drive' and 'Apply Views'. The 'Drive' tab is active, showing various fields for editing a drive:

- Name:  \*
- Workspace:
- Home Path:
- Workspace Icon:
- Permissions:  \*
- Show Referenced Documents: ☐
- Show Non-document Nodes: ☒
- Show Sidebar: ☒
- Show Hidden Nodes: ☐
- Allow Folder Creation: 
  - Unstructured folder
  - exo.webFolder
  - exo.linkFolder


2. Edit the properties as required.
3. Click **Save** to commit the changes.



#### Note

The drive name cannot be edited in this form.

#### 5.1.6.3.4.3. Delete a drive

1. Click  that corresponds to the drive you want to delete.
2. Click **OK** to delete the drive in the confirmation message.

## 5.1.6.4. Content Types

### 5.1.6.4.1. Namespace registry

The namespace is a prefix in the node type name. It enables you to create node types without fearing any conflict with existing node types. The registry helps you manage the namespaces used in the system.

Select **Content Types** --> **Namespace Registry** to open the **Namespace Registry** form.

Prefix	Namespace URI
app	http://www.gatein.org/jcr/application-registry/1.0/
cmis	http://www.exoplatform.com/jcr/cmisis/1.0
dc	http://purl.org/dc/elements/1.1/
exo	http://www.exoplatform.com/jcr/exo/1.0
exoide	http://exoplatform.org/ide/1.1.x/
fn	http://www.w3.org/2005/xpath-functions
fn_old	http://www.w3.org/2004/10/xpath-functions
Fwd	http://www.exoplatform.com/jcr/Fwd/1.1/
gtn	http://www.gatein.org/jcr/gatein/1.0/
jcr	http://www.jcp.org/jcr/1.0

#### Register a namespace

1. Click **Register** on the **Namespace Registry** form to register a new namespace.

2. Enter the value for the **Namespace Prefix** field that is required.
3. Enter the value for the **URI** field which must be unique and required.



#### Note

The namespace must not contain special characters, such as !, @, #, \$, %, &, \*, (, ).

### 5.1.6.4.2. Manage node types

This function is used to control all node types in eXo Platform.



**Manage ECM Main Functions**

Categories & Tags

Content Presentation

Content Types

Namespace Registry

**Manage Node Type**

Advanced Configuration

**Manage Node Type**

Node Type Name \*

Total pages: 40

Icon	Node Type	Mixin Type	Orderable Child Nodes	Description	Action
	app:application	✗ false	✗ false	nothing	
	app:applicationre	✗ false	✓ true	nothing	
	app:category	✗ false	✓ true	nothing	
	app:gadgetdata	✗ false	✗ false	nothing	
	app:gadgetdefinit	✗ false	✗ false	nothing	
	app:gadgetregist	✗ false	✗ false	nothing	
	app:localgadgetd	✗ false	✗ false	nothing	
	app:remotegadg	✗ false	✗ false	nothing	
	cmis:document	✓ true	✗ false	nothing	
	cmis:folder	✓ true	✗ false	nothing	

Total pages: 40

Add Import Export

## View node types

- Click that corresponds to the node you want to view. The **View Node Type Information** form will appear.

**View Node Type Information**

Node Type

Name Space: app

Node Type Name: application \*

Is Mixin Type: false

Orderable Child Nodes: false

Primary Item Name:

Super Types: gtn:protectedresource, mix:referenceable, gtn:cmis \*

Property Definitions: [jcr:primaryType], [app:creationdate], [app:lastmodificationdate], [gtn:edit-permissions], [gtn:description], [gtn:name], [gtn:access-permissions]

- Click **Close** to exit this form.

## Add a node type

- Open the **Add/Edit Node Type Definitions** form by clicking **Add** on the **Manage Node Type** page.

**Add/Edit Node Type Definitions**

Node Type

Name Space:

Node Type Name: \*

Is Mixin Type: false

Orderable Child Nodes: false

Primary Item Name:

Super Types: \*

Property Definitions:

Child Node Definitions:


Save Save as Draft Cancel

- Select a namespace for the node.

- Enter a name in the **Node Type Name** field. This field is mandatory and its value must be unique.

**Note**

The name must not contain special characters, such as !, @, #, \$, %, &, \*, (, ).

- Select a value for the **Is Mixin Type** field.
  - True: This node is Mixin type.
  - False: This node is not Mixin type.
- Select a value for the **Orderable Child Nodes** field.
  - True: Child nodes are ordered.
  - False: Child nodes are not ordered.
- Enter a value for the **Primary Item Name** field.
- Click  to add more parent types in the **Super Types** field.
  - Property Definitions:** List all definition names of the **Property** tab.
  - Child Node Definitions:** List all definition names of the **Child Node** tab.
- Click **Save** to accept adding a new node type, or **Save as Draft** to save this node type as draft.

### Export Node Types

- Open the **Export Node Types** form by clicking the **Export** button at the bottom of the **Manage Node Type** page.

Node Type	Export
soc:relationshipdefinition	<input checked="" type="checkbox"/>
nt:folder	<input checked="" type="checkbox"/>
exo:linkable	<input checked="" type="checkbox"/>
exo:trashFolder	<input checked="" type="checkbox"/>
nt:childNodesDefinition	<input checked="" type="checkbox"/>
exo:tagHome	<input checked="" type="checkbox"/>
exo:answerHome	<input checked="" type="checkbox"/>
exo:article	<input checked="" type="checkbox"/>
exo:portalFolder	<input checked="" type="checkbox"/>
rma:destroyable	<input checked="" type="checkbox"/>

Export Cancel Uncheck all

- Click **Uncheck all** if you do not want to export all node types. After clicking **Uncheck all**, this button becomes the **Check all** button.
- Select nodes that you want to export by ticking the checkboxes.
- Click the **Export** button in this form.
- Select the location in your device to save the exported node.

**Note**

You must select at least 1 node type to be exported. If you do not want to export the node, click **Cancel** to quit this pop-up.

**Import Node Types**

1. Open the **Import Node Type From XML File** form by clicking the **Import** button at the bottom of the **Manage Node Type** page.


2. Click **Browse...** to upload a file.

**Note**

You must upload an XML file. This file is in the node type's format.

3. Click the **Upload** button.

**Note**

If you want to upload another file, click  to delete the file which has just been uploaded, then upload other files.

4. Tick the checkboxes corresponding to the nodes that you want to import.
5. Click **Import** to complete importing a node type.

### 5.1.6.5. Advanced Configuration

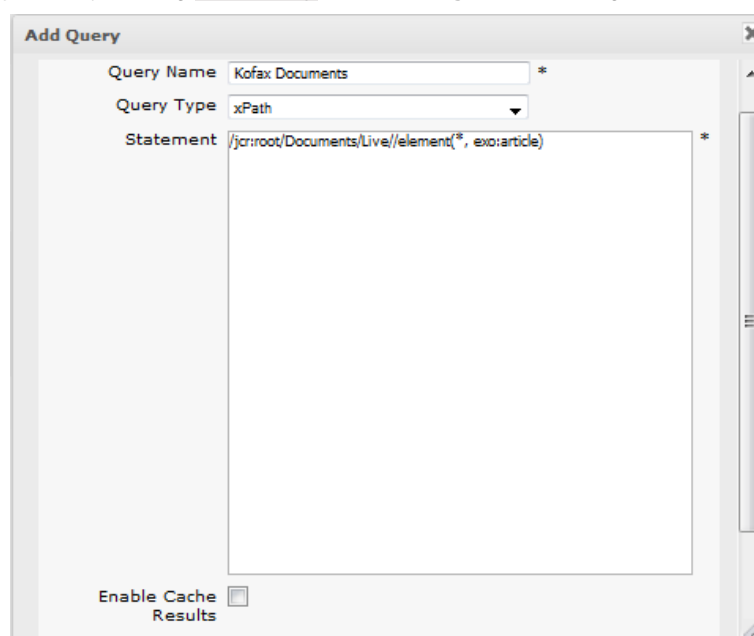
#### 5.1.6.5.1. Manage queries

The function enables you to add, edit and delete queries by going to **Advanced Configuration --> Manage Queries**.

Manage Queries				
Name	Type	Statement	Permissions	Actions
All Articles	xpath	<code>//element(*,exo:article) [not(@jcr:mixinTypes = 'exo:restoreLocation')] order by @exo:dateCreated descending</code>	*:/platform/users	 
Created Documents	xpath	<code>//*[(@jcr:primaryType = 'exo:article' or @jcr:primaryType = 'nt:file') and @exo:owner='{UserId}\$' and not(@jcr:mixinTypes = 'exo:restoreLocation')] order by @exo:dateCreated descending</code>	*:/platform/users	 
CreatedDocumentDayBefore	xpath	<code>//element(*,exo:article) [(@exo:dateCreated &lt; xs:dateTime('{Date}\$')) and not(@jcr:mixinTypes = 'exo:restoreLocation')] order by @exo:dateCreated descending</code>	*:/platform/users	 
<div style="text-align: right;">  <span style="color: red; font-weight: bold;">Add a new query</span> </div>				

### Add a new query

1. Open the **Add Query** form by clicking **Add Query** in the **Manage Queries** page.



**Add Query**

Query Name: Kofax Documents \*


Query Type: XPath

Statement: /jcr:root/Documents/Live//element(\*,exo:article) \*

Enable Cache Results ☐


2. Enter a query name into the **Query Name** field.
3. Select the query type from the drop-down **Query Type** menu.
  - **xPath** (XML Path Language) is a language for selecting nodes. For example, `/jcr:root/Documents/Live`.
  - **SQL** (Structured Query Language) is a database computer language.
4. Enter the statement for the query that must be unique.
5. Check or uncheck the **Enable Cache Results** option. If you tick this checkbox, for the first time you use this query to search, the result will be cached. For the second time you search using this query, it will show the cached results. After 45 minutes, the cache will be removed.

For example, you have the query **Test** with statement `//element (*, nt:file)`. In the File Explorer, you have a **nt:file** document named **File1**. When you execute the query **Test**, only document **File1** will be shown. After that, create a **nt:file** document named **File2** and execute query **Test**, only document **File2** document will be listed. After 45 minutes, the cache will be removed. When you execute the query **Test**, the documents **File1** and **File2** will be listed.


6. Select permissions for a group that can use this query by clicking .

- Click **Save** to finish adding a new query.

### Edit a query

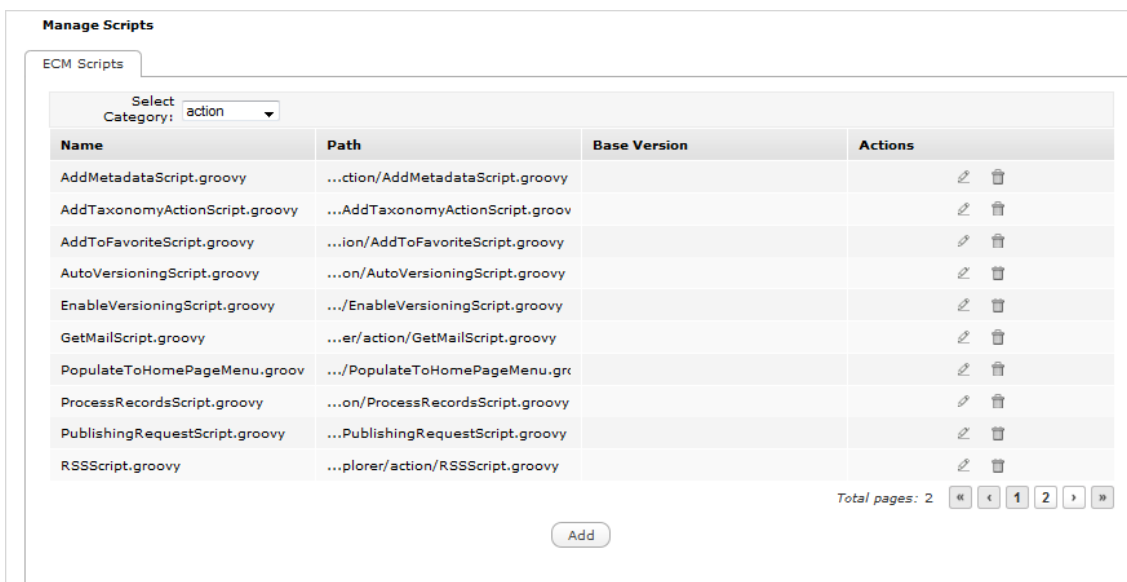
- Click  corresponding to the query you want to edit. The **Edit Query** form will appear.
- Edit the properties of the selected query.
- Click **Save** to accept all changes.

### Delete a query

- Click  corresponding to the query you want to delete.
- Click **OK** in the confirmation message to accept your deletion, or **Cancel** to discard this action.

## 5.1.6.5.2. Manage Scripts





















The function enables you to manage all script codes in the **eXo Platform** and **Browser Content** system by going to **Advanced Configuration --> Manage Scripts**.







**Manage Scripts**

ECM Scripts

Select Category: **action**

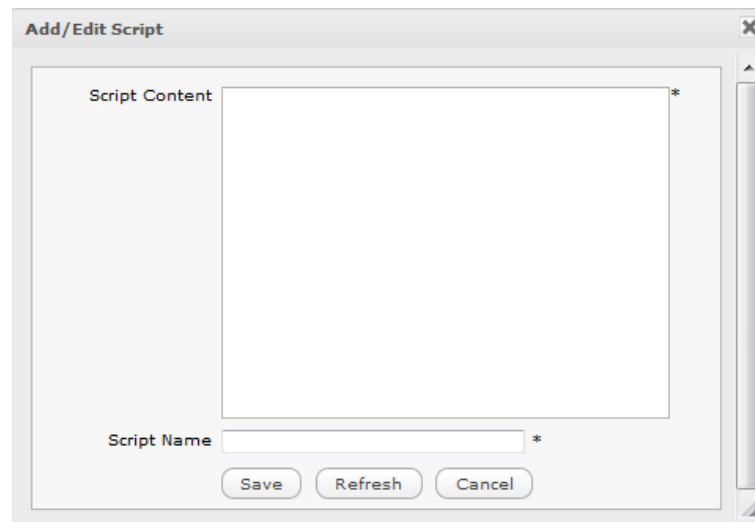
Name	Path	Base Version	Actions
AddMetadataScript.groovy	...ction/AddMetadataScript.groovy		 
AddTaxonomyActionScript.groovy	...AddTaxonomyActionScript.groov		 
AddToFavoriteScript.groovy	...ion/AddToFavoriteScript.groovy		 
AutoVersioningScript.groovy	...on/AutoVersioningScript.groovy		 
EnableVersioningScript.groovy	.../EnableVersioningScript.groovy		 
GetMailScript.groovy	...er/action/GetMailScript.groovy		 
PopulateToHomePageMenu.groov	.../PopulateToHomePageMenu.gr		 
ProcessRecordsScript.groovy	...on/ProcessRecordsScript.groovy		 
PublishingRequestScript.groovy	...PublishingRequestScript.groovy		 
RSSScript.groovy	...plorer/action/RSSScript.groovy		 

Total pages: 2   **1**  

**Add**

### Add a new script in ECM


- Click **Add** in the **Manage Script** page to open the **Add/Edit Script** form.

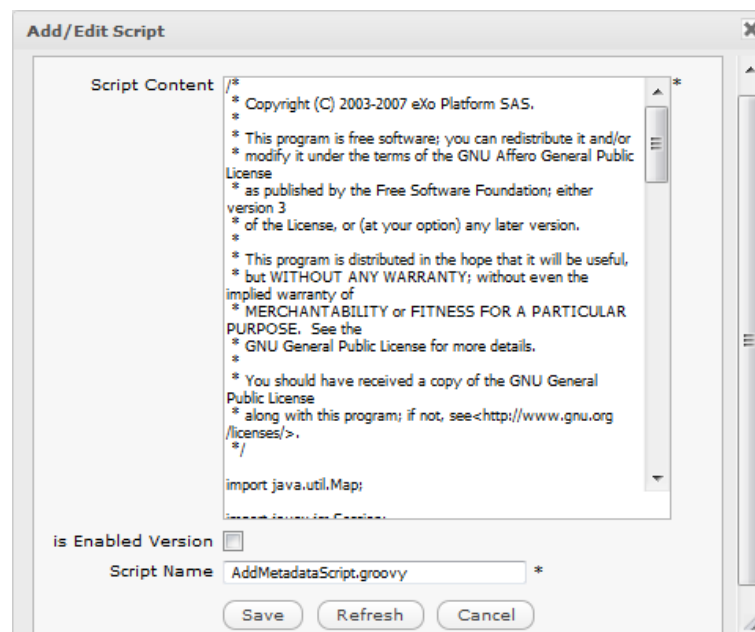


The dialog box titled "Add/Edit Script" contains a large text area labeled "Script Content" with a vertical scrollbar on the right. Below the text area is a text input field labeled "Script Name" with an asterisk (\*) to its right. At the bottom of the dialog are three buttons: "Save", "Refresh", and "Cancel".

2. Enter a value for the **Script Content** field.
3. Enter a script name for the **Script Name** field that must be unique and not contain special characters, such as `!,@,#,$,%,&,*,(,)`.
4. Click **Save** to accept adding the new script.

#### Edit an ECM script

1. Click  corresponding to the script that you want to edit in the **ECM Scripts** tab. The **Add/Edit script** form will appear.




The dialog box titled "Add/Edit Script" is shown with content. The "Script Content" field contains the following text:

```
/*
 * Copyright (C) 2003-2007 eXo Platform SAS.
 *
 * This program is free software; you can redistribute it and/or
 * modify it under the terms of the GNU Affero General Public
 * License
 * as published by the Free Software Foundation; either
 * version 3
 * of the License, or (at your option) any later version.
 *
 * This program is distributed in the hope that it will be useful,
 * but WITHOUT ANY WARRANTY; without even the
 * implied warranty of
 * MERCHANTABILITY or FITNESS FOR A PARTICULAR
 * PURPOSE. See the
 * GNU General Public License for more details.
 *
 * You should have received a copy of the GNU General
 * Public License
 * along with this program; if not, see<http://www.gnu.org
 * /licenses/>.
 */
import java.util.Map;
```

Below the text area, there is a checkbox labeled "is Enabled Version" which is currently unchecked. The "Script Name" field contains the text "AddMetadataScript.groovy" with an asterisk (\*) to its right. At the bottom are three buttons: "Save", "Refresh", and "Cancel".

2. Edit the properties in this form.
3. Click **Save** to save all changes.

#### Delete an ECM script

1. Click  on the script that you want to delete in the **ECM Scripts** tab.
2. Click **OK** in the confirmation message to accept your deletion, or **Cancel** to discard this action.

### 5.1.6.5.3. Create an action type

This function allows you to manage all action nodes in **eXo Platform**.

1. Select **Advanced Configuration --> Create Action Type**.

Name	Extends Action Type
exo:action	[nt:base]
exo:addMetadataAction	[exo:action] [exo:scriptAction] [nt:base]
exo:addToFavoriteAction	[exo:action] [exo:scriptAction] [nt:base]
exo:autoVersioning	[exo:action] [exo:scriptAction] [nt:base]
exo:createRSSFeedAction	[exo:action] [exo:scriptAction] [nt:base]
exo:enableVersioning	[exo:action] [exo:scriptAction] [nt:base]
exo:folksonomyAction	[exo:action] [exo:scriptAction] [nt:base]
exo:getMailAction	[exo:action] [exo:scriptAction] [nt:base]
exo:populateToMenu	[exo:action] [exo:scriptAction] [nt:base]
exo:processRecordAction	[exo:action] [exo:scriptAction] [nt:base]

2. Click **Add** to open the **Action Type** form.

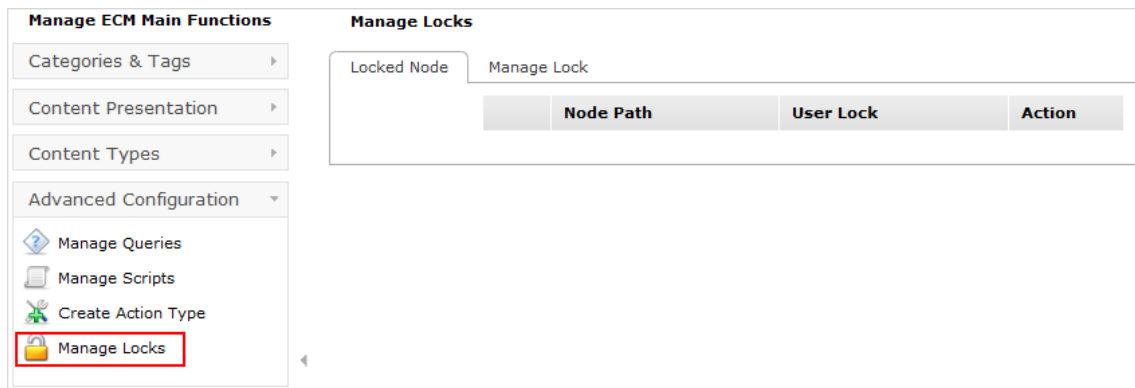
3. Select the action type.
4. Input a name for the action.
5. Check/uncheck the **is Action Move** option. The action will have the `exo:move` property or not.
6. Select an "execute" for the **Execute** field.
7. Click next to **Variables** field to add more values for the action.
  - Click to delete a value.
8. Click **Save** to accept adding a new action type.


### 5.1.6.5.4. Manage locks

All locked nodes are listed and managed by administrators in the **Content Administration** page. There are two ways that help administrators lock nodes: unlock nodes in the right-click menu in **Sites Explorer** or unlock nodes in the **Content Administration** page.


#### Unlock a node

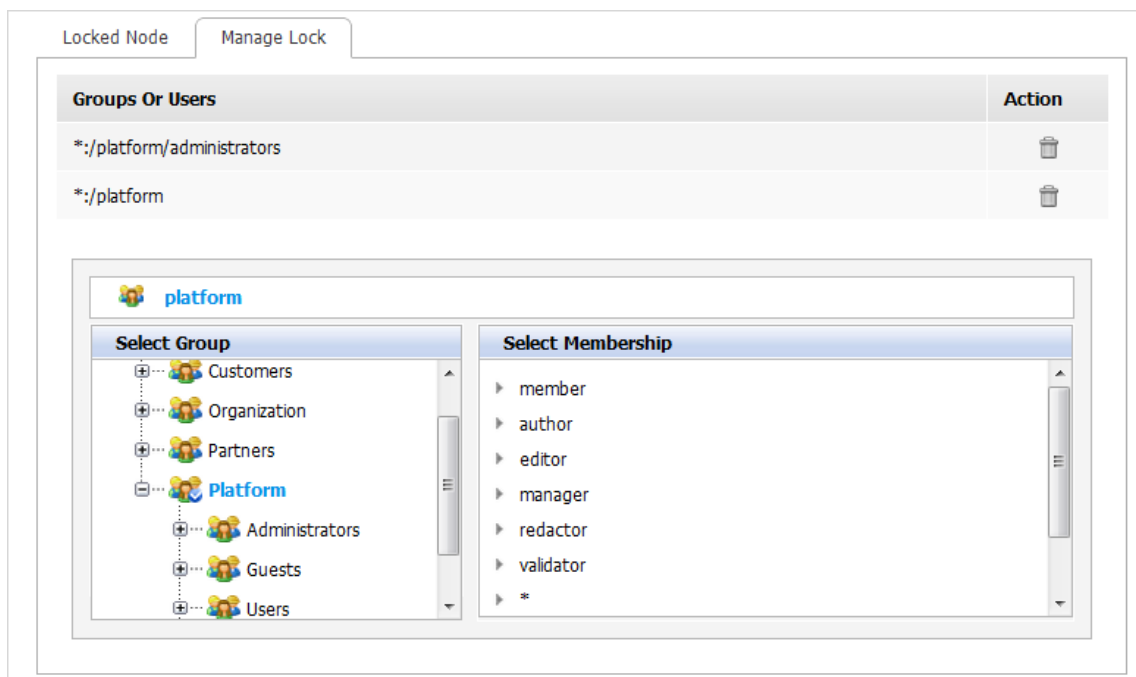
1. Select **Advanced Configuration --> Manage Locks** on the **Manage ECM Main Functions** pane on the left. The locked nodes will be listed in the right pane.



2. Click  corresponding to nodes which need to be unlocked in the **Locked Node** tab in the right pane. The unlocked nodes will disappear from the locked nodes list.

Administrators can manage and add the unlock permission for another group and users in the **Manage Lock** tab.

3. Select the group on the **Select Group** pane and the corresponding membership on the **Select Membership** pane. The selected group will be listed in the **Groups Or Users** column.
  - Click  corresponding to the group which you want to remove from the "Unlock" permission list, except 2 groups:
    - \*:/platform/administrator and root.



## 5.2. Manage content

- [Contribute content](#)

Introduction to the **Edit** mode, procedures to do actions in **InContext Editing**, **Inline Editing**, **CKEditor** and information about the publication process.

- [Manage content list viewer by query](#)

Introduction to the **Content By Query** portlet and detailed steps to add this portlet to a specific page.

- [Create content inside a category](#)

Steps to create content in a category.



- [Manage content in Sites Explorer](#)

Information about Web content, and detailed steps to create, edit, delete, publish and search for web content in **Sites Explorer**.

- [Manage content with WebDAV](#)

Introduction to **WebDAV**, and detailed steps to use **WebDAV** in **eXo Platform**, add new content or delete web content in **WebDAV**.

- [Manage content with Fast Content Creator](#)

Introduction to the **Fast Content Creator** portlet, steps to configure this portlet and to create and view content with this portlet.

- [Create content templates with Form Builder](#)

Introduction to the **Form Builder** portlet, the way to add this portlet to a specific page, steps to create and edit the template of document types.

- [Manage CLV templates in Sites Explorer](#)

Instructions on how to create, edit and delete a CLV template.

- [Manage Category Navigation](#)

Instructions on how to access and configure the **Category Navigation** portlet.

- [Manage SEO](#)

Introduction to **Search Engine Optimization (SEO)**, steps to manage **SEO** data of web pages, web content and optimize your website for search engine.

- [Search content in a site](#)

Steps to search for content and to configure the **Search** portlet.

- [Print content](#)

Steps to print any content in a site.

In addition to using [functions on action tabs](#) in content management, this section provides with more advanced functions for your most effective content management. You not only know many different types of content management, but also know how to create templates for content. Moreover, you will learn how to [optimize your content for search engines](#).

#### See also

- [Structure content](#)
- [Manage newsletter](#)
- [Manage workflows](#)

## 5.2.1. Contribute content

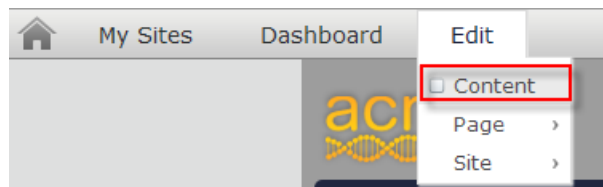
This function allows contributor to edit content, quickly access content list folders from the homepage of the current site, publish content without using the [Manage Publication](#) function in **Sites Explorer**.

### 5.2.1.1. Edit mode

When you access a site, by default, the site content is in the published mode and you cannot edit them.

However, each site in eXo Platform has the **Edit** mode which enables you to edit all content of the current site. When hovering your cursor over content, you can see the Edit icon which enables you to quickly edit this content. You can take advantage of this feature to submit content to a page.

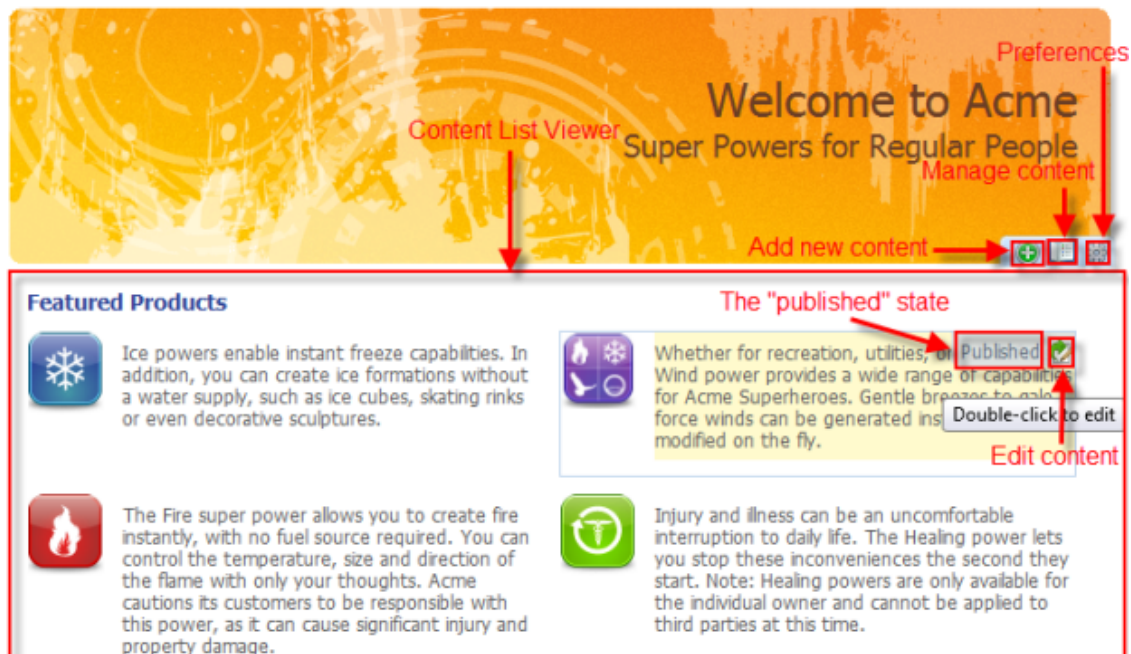
To turn on the **Edit** mode, hover your cursor over **Edit** on the **Administration** bar, then select **Content** from the drop-down menu.



For Single Content Viewer (SCV), you can see the current state of the content, the Edit Content icon and Preferences icon.



For Content List Viewer (CLV), you can see the current state of the content, the Edit Content icon, the Preferences icon, the Add Content icon and the Manage Content icon.




### 5.2.1.2. InContext Editing

By using the **InContext Editing** feature, the process of editing a page becomes more intuitive. This feature allows you to edit content "in context" without using the WYSIWYG editor, and the new content will automatically override old one.

To use **InContext Editing**, you first need to turn on the **Edit Mode**.

#### 5.2.1.2.1. Add content




Adding new content by using **InContext Editing** is enabled for the **Content List Viewer (CLV)**.

1. Turn on the **Edit Mode**, then hover your cursor over the CLV to which you want to add new content.
2. Click  on the CLV.

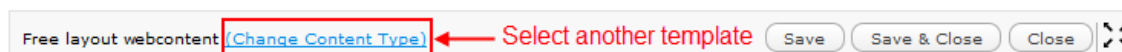
You will be directed to the **Sites Explorer** with a list of content templates for you to select.




**Details:**

Field	Description
<b>Free layout web content</b>	This template is a free layout.
<b>Picture on head layout web content</b>	The site's content is presented in two spaces. One is for inserting an image and the other for editing the site's content. The image will be put at the head of a site.
	Display the list of the content templates in the List view.
	Display the list of the content templates in the Thumbnail view.
	Cancel selecting the content template and back to the previous page.

- Click one template for your content. Each template has an Info bar on the top of the template.



**Details:**

Field	Description
<b>Change Content Type</b>	Select another content types.
<b>Save</b>	Save the content without closing the content form.
<b>Save &amp; Close</b>	Save the content and close the content form.
<b>Close</b>	Close the content form without saving the content.
	Switch on/off the full-screen mode.

- Fill all the fields in the form. See the [Add a document](#) section to know how to create the different content types.
- Click **Save** or **Save & Close** to save the document.




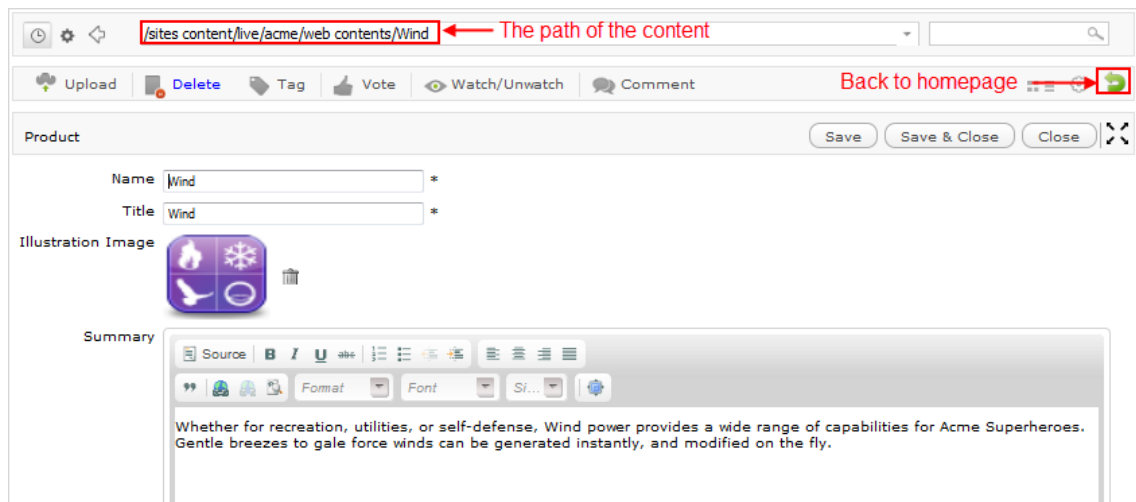
#### Note


The folder, where a document is saved, is the path you have selected in the [Manage preferences](#) section.

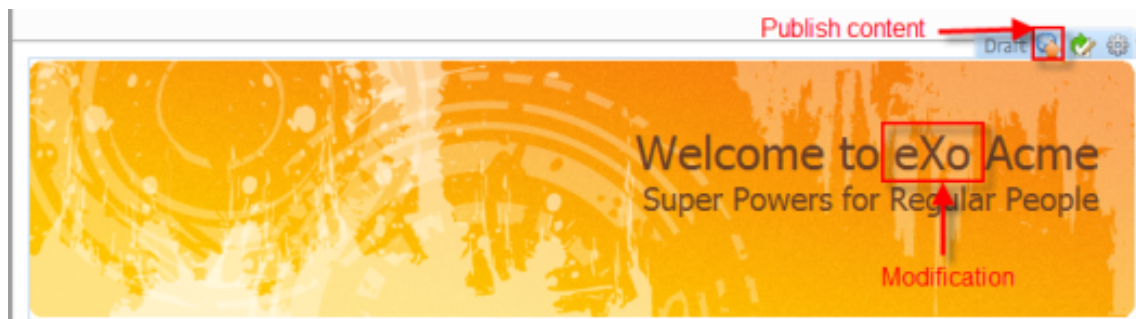
### 5.2.1.2.2. Edit content



You can edit any content on the homepage for SCV and CLV with **InContext Editing**. However, for CLV, you only can edit each content in it.

- Turn on the **Edit** mode by hovering your cursor over **Edit** on the **Administration** bar, then select **Content**.
- Hover your cursor over the content you want to edit, and click  at the right corner. You will be directed to **Sites Explorer** with the document form for you to edit.



3. Make changes on the content, then click **Save** or **Save & Close** to accept your changes.
4. Click  to return to the site. In the **Edit** mode, your new content will be in the "Draft" state with its visible modifications.



5. Click  , or  on the **Action** bar to publish your edited content. Your content is now in the "Published" state.




#### Note

You cannot see the edited content in the draft state when you turn off the **Edit** mode.

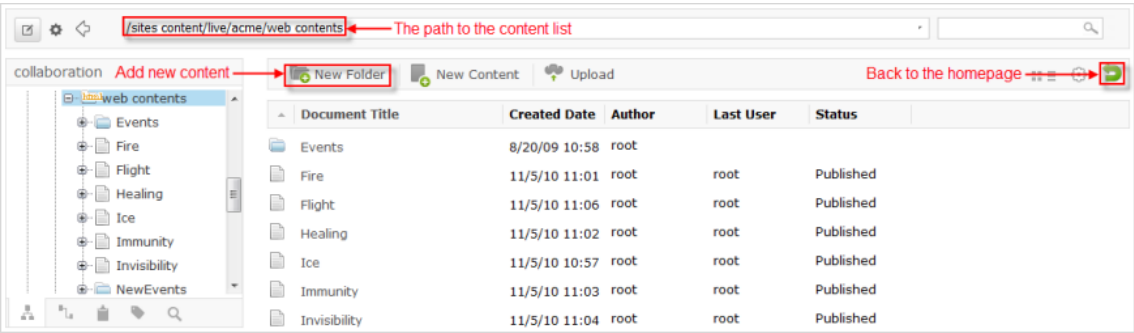
### 5.2.1.2.3. Manage content

With **InContext Editing**, you can easily manage a Content List Viewer on the homepage. You can add new content in the CLV, edit, delete an existing content or copy/cut/paste to another CLV and take more actions in the right-click menu.

#### Add content in the CLV

1. Turn on the **Edit** mode.
2. Hover your cursor over the CLV which you want to manage on the homepage, and click  .

You will be directed to the **Sites Explorer** page.



- 3. Click **New Content** on the **Action** bar.
- 4. Do the same steps as in the [Add Content](#) section.

**Do other actions**

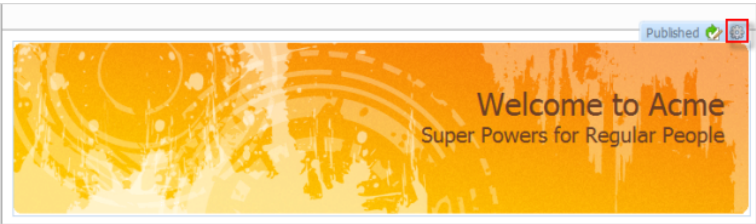
Right-click specific content in the CLV to open the drop-down menu. From here, you can do many actions as mentioned in the [Actions on folders and documents](#) section.

**5.2.1.2.4. Manage preferences**

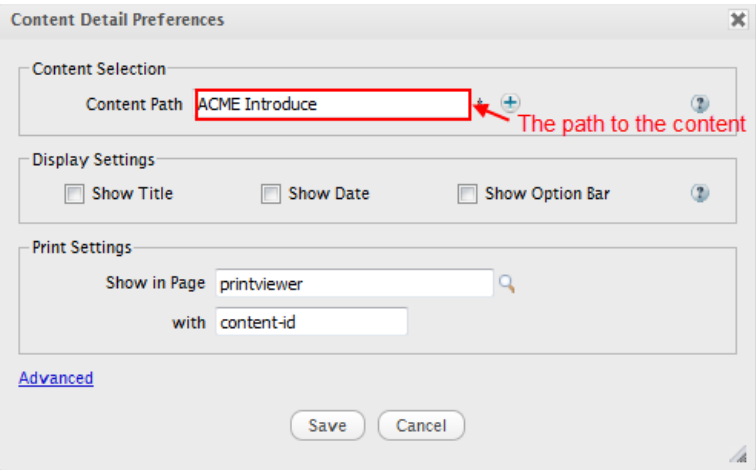
Preferences enable you to edit content in the Single Content Viewer (SCV) and the Content List Viewer (CLV), reset the display of the content in SCV and CLV and publish content.

**Edit the Single Content Viewer**

- 1. Turn on the **Edit** mode.
- 2. Select of a Single Content Viewer.




The **Content Detail Preferences** dialog appears.





**Details:**

Field	Description
Content Selection	

Field	Description
	Select the path of the content that you want to show by clicking  .
<b>Display Settings</b>	<p>Configure the visibility of Title, Date and Option bar.</p> <ul style="list-style-type: none"> <li>• <b>Show Title:</b> Select this checkbox to display the title of the content.</li> <li>• <b>Show Date:</b> Select this checkbox to display the date of the content publication.</li> <li>• <b>Show Option Bar:</b> Select this checkbox to display the <b>Option</b> bar which is used to show the print link.</li> </ul>
<b>Print Settings</b>	<ul style="list-style-type: none"> <li>• <b>Show in Page:</b> The content is shown in the page.</li> <li>• <b>with:</b> Parameters contain the content path.</li> </ul>
<b>Advanced link:</b>	<p>When clicking this link, the <b>Advanced</b> pane will be shown with two parts.</p> <ul style="list-style-type: none"> <li>• <b>Dynamic Navigation:</b> Allow you to get a parameter to configure the portlet by URL. It means that the URL containing the content path can be dynamically changed.</li> <li>• <b>Disable:</b> By default, if the property is set as "Disable", the <b>Advanced</b> pane is closed by default. It means the single content will be opened by an URL containing the Content Path.</li> <li>• <b>Enable:</b> This portlet is configured with the provided parameter ("content-id" by default) and the content.</li> <li>• <b>By:</b> This parameter is the key in the URL to let SCV know which really is the path in the current URL. It is editable when the <b>Contextual Content</b> is set to "Enable".</li> <li>• <b>Content Visibility:</b> Allow you to use a cache shared between users to get content. If you want to get content, which are displayed in CLV or SCV, from one cache, select <b>Restricted by Authentication</b>. If not, select <b>Restricted by User Roles</b>. In most cases, you should not switch to <b>Restricted by User Roles</b> as it reduces the overall performance.</li> </ul>

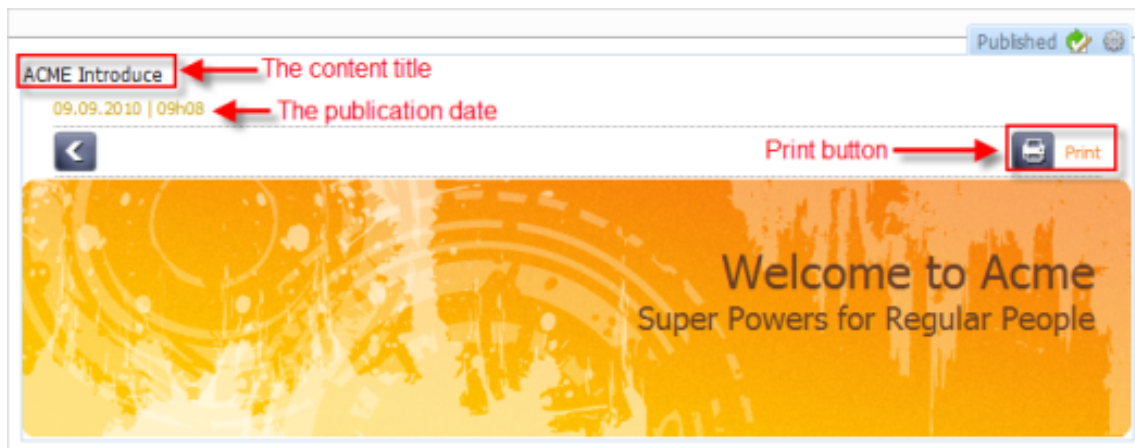
**Note**


Hover your cursor over  to see a quick help for each section.

3. Click  next to the **Content Path** to select another content. The **Select Content** dialog appears.
4. Select a folder in the left pane, and its content in the right pane. The selected content will be displayed in the **Content Path** field.



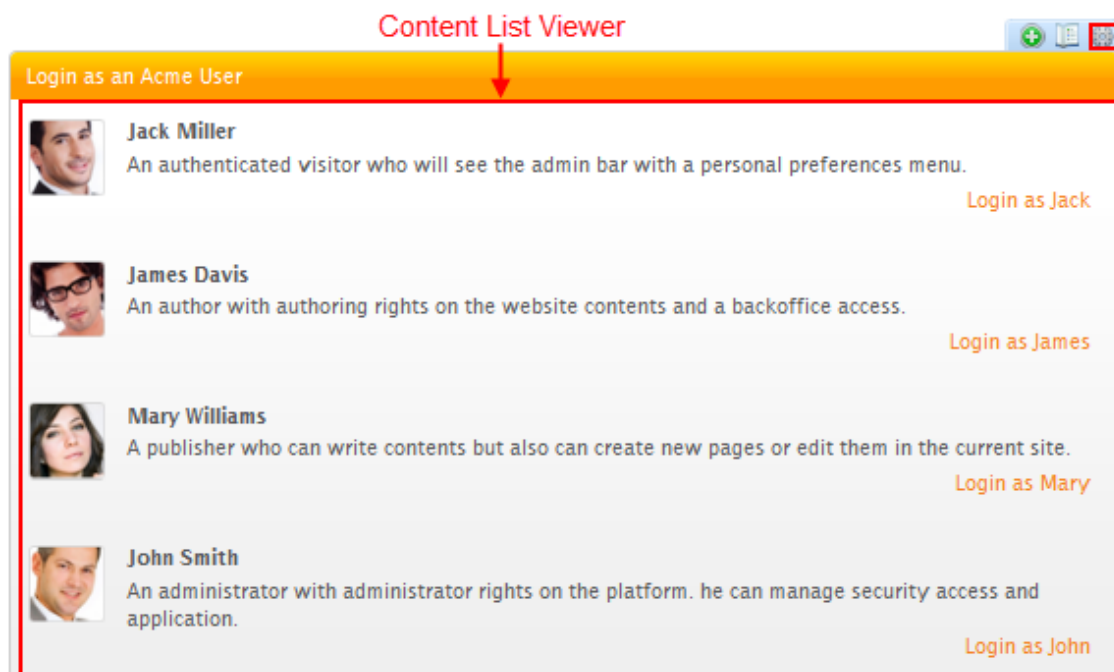
5. Tick the checkboxes, including **Show Title**, **Show Date** and **Show Option Bar**, if you want to display the content title, the publication date and the print button like the illustration below.



- i. In the **Print Setting** part, click  to open the **UIPageselector** dialog. You will see **Printviewer**.
  - ii. Click the **Print** button. The content is opened in the print viewer page.
6. Click **Save** to save all your changes.

#### Edit the Content List Viewer

1. Turn on the **Edit** mode.
2. Select the **Preferences** icon of a Content List Viewer.



The **Content List Preferences** dialog appears.

**Content List Preferences**

**Content Selection**

Mode: ☒ By Folder ☐ By Content

Folder Path:  → The path to the content folder

Order by:    
☐ Descendant ☒ Ascendant

**Display Settings**

Header:  Automatic Detection: ☒

Template:

Paginator:

Items per Page:  \*

Show Title: ☒ Show Image: ☒ Show Summary: ☒

Show Header: ☒ Show Date: ☐ Show Link: ☐ Advanced pane

Show Refresh: ☐ Show More Link: ☐ Show RSS Link: ☐

**Advanced**

**Dynamic Navigation**

Contextual Folder: ☐ Enabled ☒ Disabled

by:

Show in Page:

with:

**Content Visibility**

☒ Restricted by Authentication ☐ Restricted by User Roles

Save Cancel

**Details:**

Field	Description
<b>Content Selection</b>	<p><b>Mode:</b> This mode is to select web content for the list viewer. There are two modes:</p> <ul style="list-style-type: none"> <li>• <b>By Folder:</b> This mode allows you to select a content folder in the <b>Folder Path</b> field.</li> <li>• <b>By Content:</b> This mode allows you to select by the content in a specific folder in <b>Folder Path</b> field.</li> </ul> <p><b>Folder Path:</b> The path to a location of a folder that contains the content.</p> <p><b>Order by:</b> Sort content in the List Viewer by <b>Title</b>, <b>Date Created</b> or <b>Date Modified</b> in ascending or descending order.</p>
<b>Display Settings</b>	<p><b>Header:</b> The title of all content that is listed in the List Viewer.</p> <p><b>Template:</b> The template which is used to view the content list.</p> <p><b>Paginator:</b> The template which is used to view each content in the list.</p>



Field	Description
	<p><b>Items per Page:</b> The number of items which will be displayed per page.</p> <p>The following options which can be shown or hidden by ticking or unticking checkboxes respectively.</p> <ul style="list-style-type: none"> <li>• <b>Show Title:</b> Title of each published web content/document.</li> <li>• <b>Show Header:</b> Header of each published web content/document.</li> <li>• <b>Show Refresh:</b> The <b>Refresh</b> button at the left bottom of the page.</li> <li>• <b>Show Image:</b> The illustration of each published web content/document.</li> <li>• <b>Show Date:</b> The created date of each published web content/document.</li> <li>• <b>Show More Link:</b> The <b>Read more</b> link to read all the content of web content and/or document.</li> <li>• <b>Show Summary:</b> The summary of each web content/document.</li> <li>• <b>Show Link:</b> The link of web content/document.</li> <li>• <b>Show RSS Link:</b> The RSS link of all content of web content/document.</li> </ul>
Advanced link	<p><b>Dynamic Navigation</b></p> <ul style="list-style-type: none"> <li>• <b>Disable:</b> The single content will be opened by an URL containing the Content Path.</li> <li>• <b>Enable:</b> This portlet is configured with the provided parameter (content-id by default).</li> <li>• <b>By:</b> This parameter is the key in the URL to let CLV know which really is the path in the current URL.</li> <li>• <b>Show in Page:</b> The single content in CLV will be shown in a selected page. You can select any page but should take one with a Content Detail Portlet. The "Dynamic Navigation" is enabled in the Content Detail Portlet that interprets the URL and shows a single content.</li> <li>• <b>With:</b> This parameter is the key in the URL to let SCV know which really is the path in the current URL.</li> </ul> <p><b>Content Visibility:</b> Allow you to use a cache shared between users to get content. If you want to get content which is displayed in CLV or SCV from one cache, select <b>Restricted by Authentication</b> (default). If not, select <b>Restricted by User Roles</b>. In most cases, you should not switch to <b>Restricted by User Roles</b> as it reduces the overall performance.</p>

3. Browse the documents or web content of an available site by clicking  next to the **Folder Path** field.

4. If you select the **By Folder** mode, select an available site on the left, then select a folder that contains content (documents and/or web content) on the right by clicking the folder.

If you select the **By Content** mode, select an available folder from the left pane, all content in this folder will be listed in the right pane. Click content on the right that you want to add to the content list. There will be a message, informing that you have successfully added it to the Content List. The selected content will be listed in the Content List.

5. Enter a header for the content list in the **Header** field if you want.
6. Select a template to display the content list in the template list.
7. Tick/Untick your desired options.
8. Click **Save** to accept your changes.

### 5.2.1.3. Inline Editing

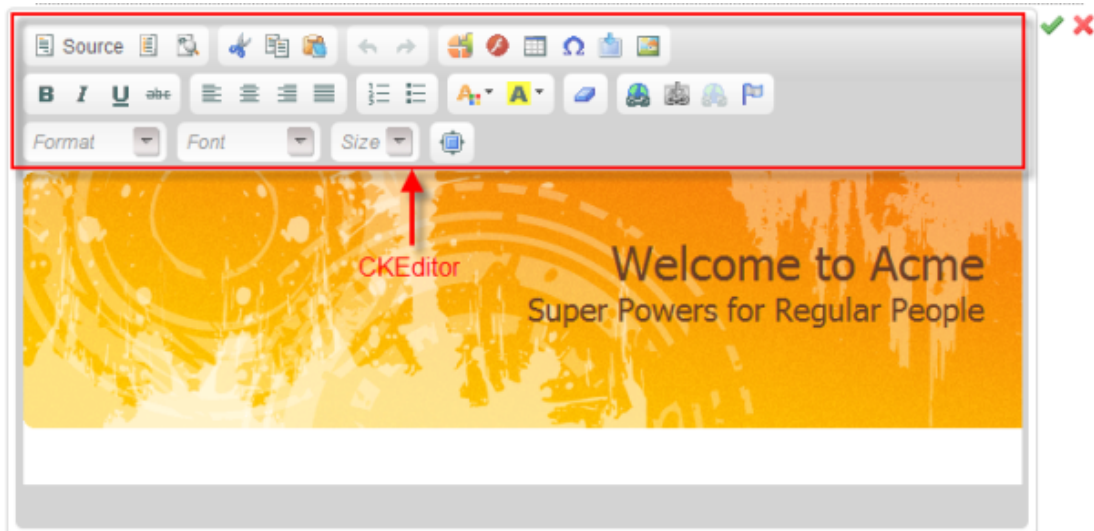
The **Inline Editing** mode allows you to edit directly on the page without going to a separate one. By using this mode, you can edit the text in the same location in such an intuitive and convenient manner.



#### Do the Inline Editing

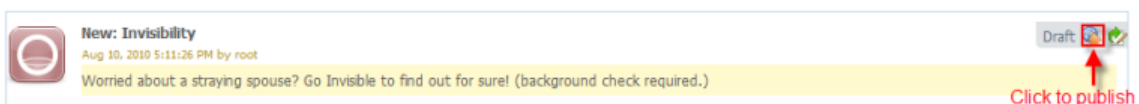
1. Turn on the **Edit** mode on the **Administration** bar.
2. Hover your cursor over the area you want to edit. The editable area will be highlighted.
3. Double-click the area until the Edit area is shown as below.




In case the hovered area is in the Rich Text format, the Edit area will be displayed with the **CKEditor** as below. (See more information about CKEditor [here](#).)



4. Make changes on your selected area.
5. Click  to accept, or  to discard changes.
  - After you have made changes on your content, it is only in the **Draft** state.




- Click  to publish the content. Now, your edited content is in the **Published** state.

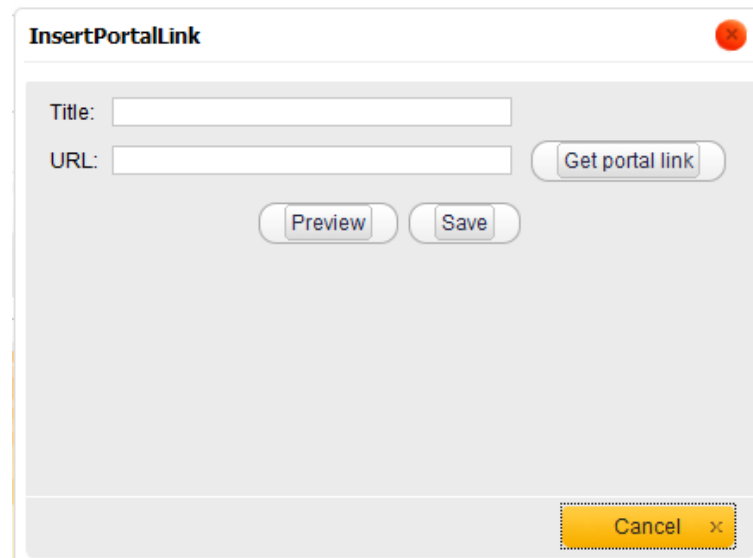
#### 5.2.1.4. CKEditor

When using CKEditor to write/edit a document, you can also:

- [Insert a portal link to the document. \[353\]](#)
- [Insert a content link to the document. \[353\]](#)

##### Insert a portal link


1. Click  to open the **Insert Portal Link** form.

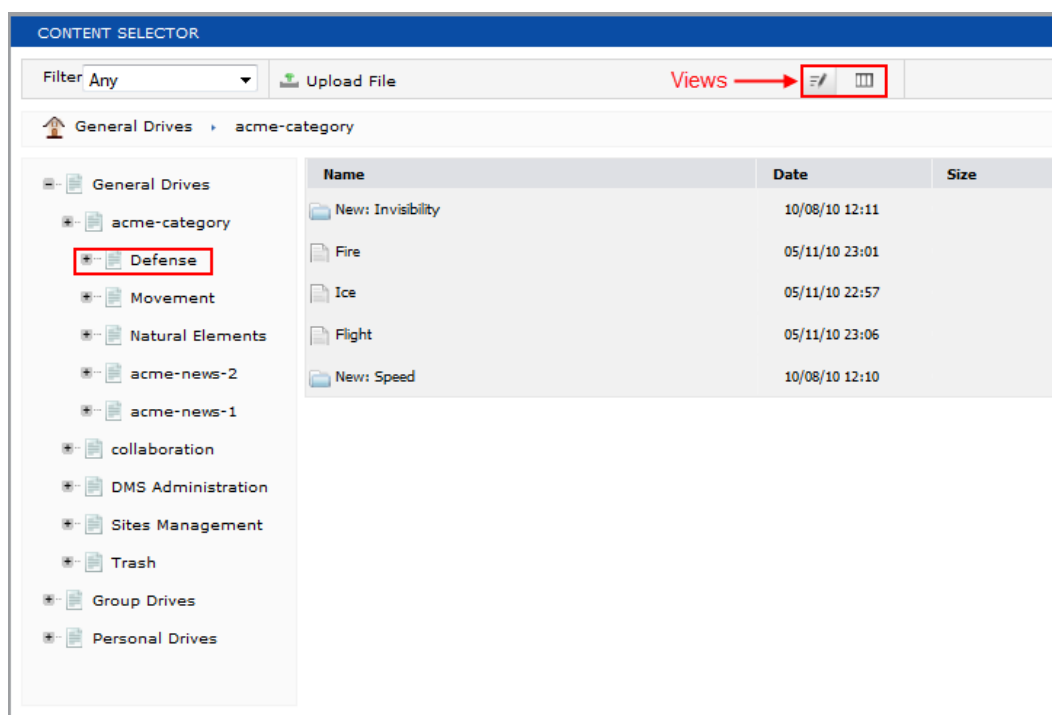


The image shows a dialog box titled "InsertPortalLink" with a red close button in the top right corner. Inside the dialog, there are two text input fields: "Title:" and "URL:". To the right of the "URL:" field is a button labeled "Get portal link". Below these fields are two buttons: "Preview" and "Save". At the bottom right of the dialog is a yellow button labeled "Cancel" with a small 'x' icon next to it.

2. Enter the title of the portal in the **Title** field.
3. Enter the portal URL manually, or you can also click **Get portal link** to open a page containing all the portals in the same server, then select one that you want.
4. Click **Preview** to view the portal.
5. Click **Save** to accept inserting the portal to the document.

##### Insert a content link

1. Click  to open a page.



- Click the plus before the document name, or click directly the document name in the left pane to show the content in the right pane, or click **Upload File** to upload a file from your local device.
- Click content that you want to insert to the document.

### 5.2.1.5. Publication process

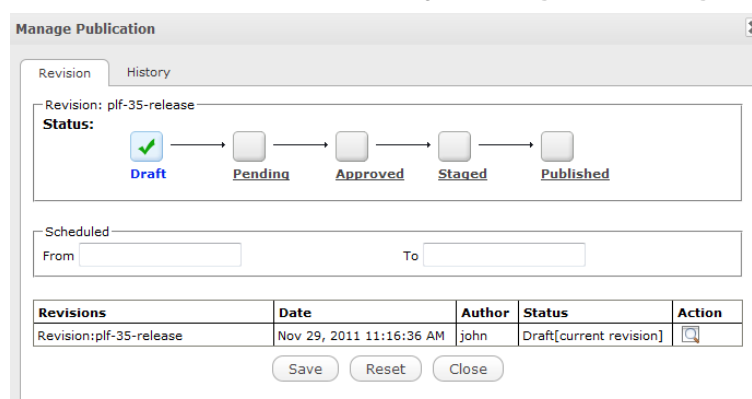
After new content has been created, it is saved as draft and you can easily publish it on your site. The publication process consists of 4 steps:

**Request for Approval --> Approval --> Stage --> Publish.**

In case you want to publish your content without having the "Approve" or "Publish" right, you first need to send your request for approval.

In case you have the right to approve or publish content, you can yourself publish it with the **Stage** step immediately.

- Request Approval:** When new content is created, it must be approved before publishing by clicking **Request Approval** on the **Action** bar of the **Sites Explorer** or clicking **Pending** in the **Manage Publication** form.



- Approve:** To approve content, click **Approve** on the **Action** bar of **Sites Explorer**, or **Approved** in the **Manage Publication**.
- Stage:** This step allows you to publish content in a period. After selecting the publication schedule for the content, it will be automatically published as the schedule.

To publish your content just in a stage, click **Stage**. Then, click **From/To** to select the start and end dates for publication from a mini-calendar.

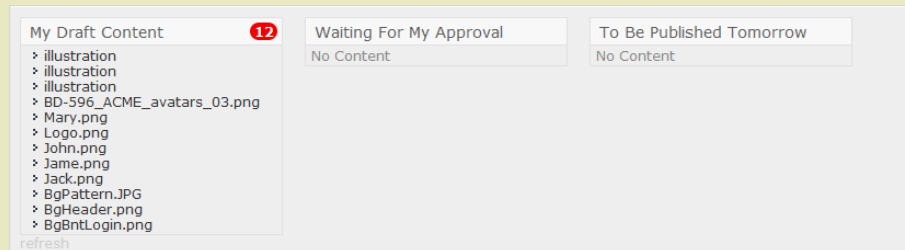
To publish your content forever, you should not set time in the **To** field.

- **Publish:** Content will be published when you have completed the **Stage** step.



### Note

You will see a list of draft content, pending content which are waiting for your approval if you have the approval right, and content that will be published at the bottom of the **Sites Explorer**. Click your desired content to review, approve or publish.

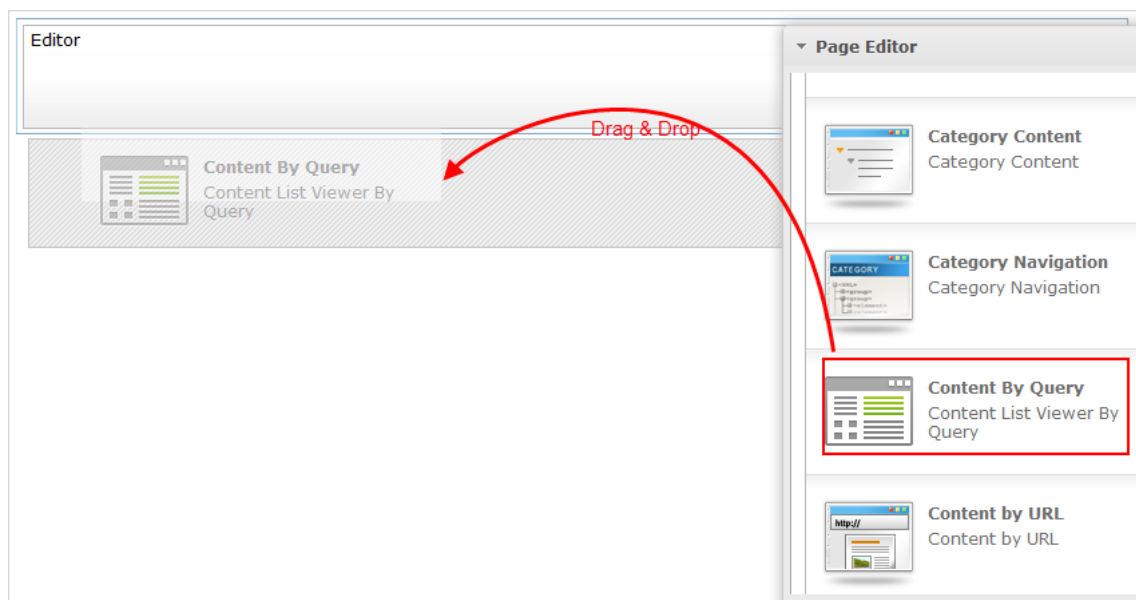


## 5.2.2. Manage content list viewer by query

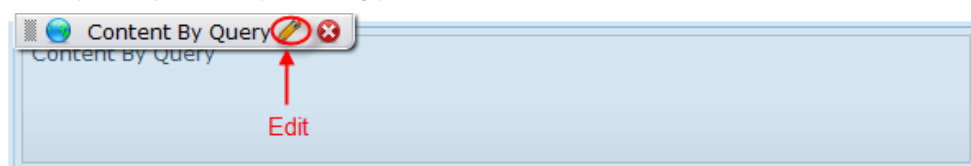
The **Content By Query** portlet allows you to collect and display data throughout a workspace by using a query instead of selecting items by a folder or by content.

To use this portlet, first you need to add the **Content By Query** portlet to a specific page as follows:

1. Drag and drop the **Content By Query** portlet from the **Page Editor --> Applications --> Content** to the main pane. You can do this step while [creating a new page](#) or [editing an existing page](#) or [editing the layout of a portal](#).



2. Edit the **Content By Query** portlet by hovering your cursor over it, then click to edit the portlet.



The form with the **Edit Mode** tab appears.

3. Enter a valid query into the **by query** field to get data that you want to display.
4. Select a workspace where you want to get data.
5. Click **Save** to complete adding the **Content By Query** portlet.
6. Click to quit the **Page Editor** page and see the displayed data.



#### Note

To learn more about fields in the **Edit Mode** tab, refer to [Content List Preferences \[349\]](#).

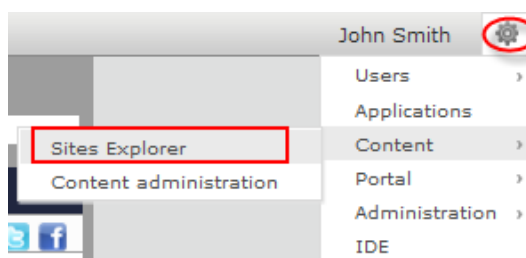
### 5.2.3. Create content inside a category

In eXo Platform, you can create new content in any folders or directly in a CLV with **Incontext Editing**. However, to facilitate the content management, categories are usually used to sort and organize documents that makes your desired searches more quickly. Also, creating content inside a category helps you manage and publish them effectively.

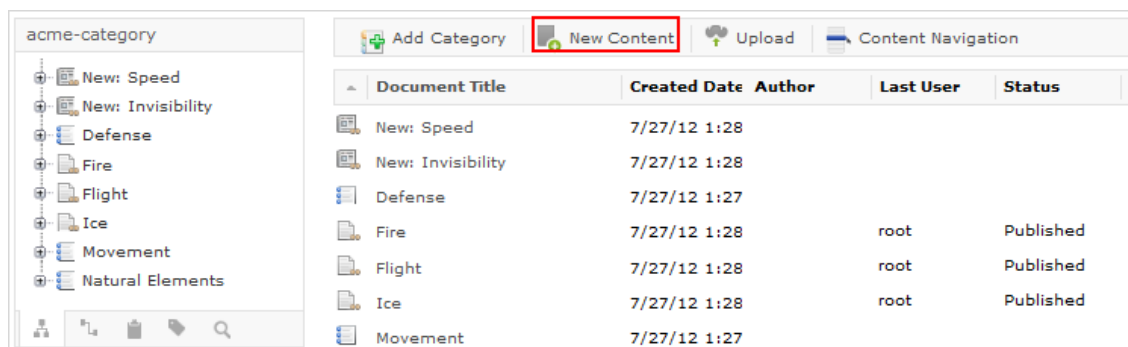
After creating a document, you should categorize it by adding it to a category. Otherwise, documents should be created right in a category and links to those documents will be automatically created in the category. In eXo Platform, categories are stored in JCR.

#### Create content in a category

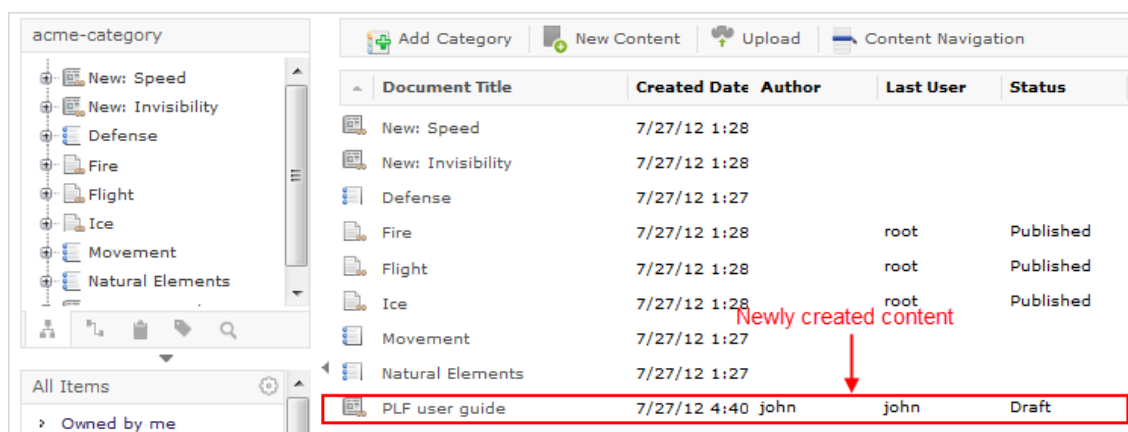
1. Hover your cursor over --> **Content** --> **Sites Explorer** on the **Administration** bar.



For example, select the **acme-category** drive as the following illustration.



- Click the **New Content** button to create new content. See the [Add a document](#) section to know how to add new content. The new content is a Symlink. To view the content, simply click the Symlink.



## 5.2.4. Manage content in Sites Explorer

Web content is a key resource which is used for a site. Other resources make a site more dynamic and animated by using layout, color, font, and more. This section focuses on how to manage web content in a specific site.



### Note

Only users who have the right to access the **Sites Management** drive can do it.

### 5.2.4.1. Create new web content

This function is used to add new web content to a specific site.

- Go to the **Sites Management** drive, then select a site to which you want to add web content.
- Select the **web content** folder on the left.




### Note

In this step, you also can add new web content into another folders (documents and media folders) of a site but you are recommended to select the **web content** folder because:

Managing web content of a site becomes more easily.

You only may add new web content in this folder so that you do not need to select web content document in the list of document types. It makes adding new web content more flexibly.

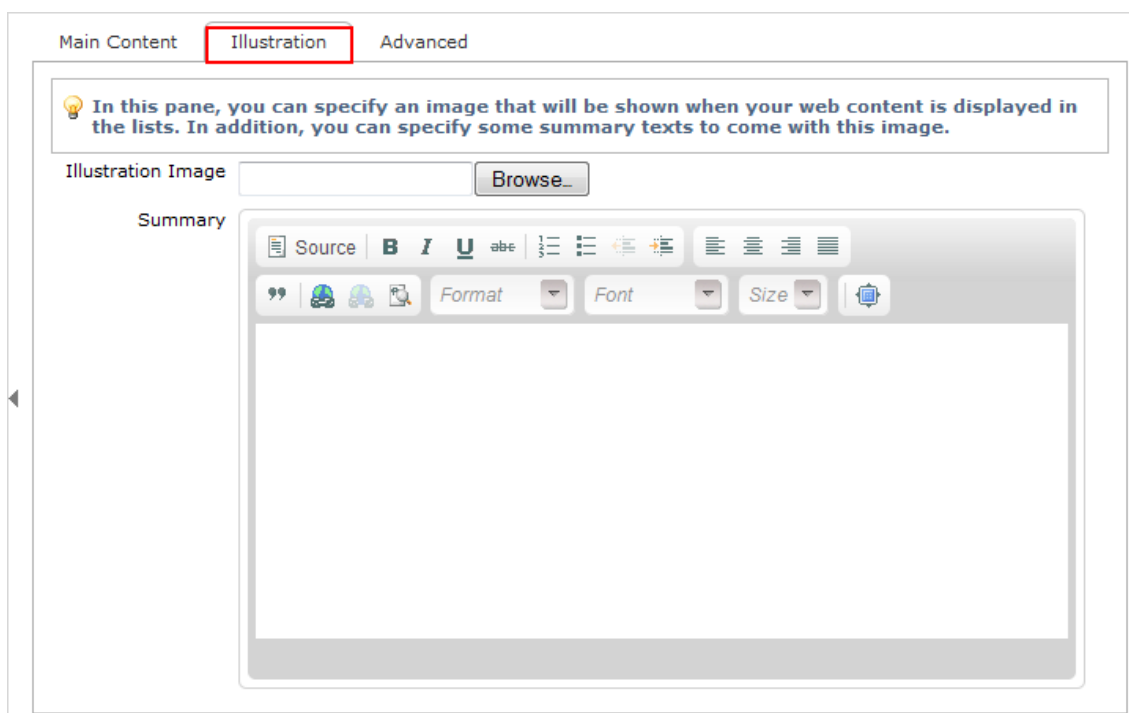
3. Click  **New Content** on the **Actionbar** to open a [list of content templates \[344\]](#), including **Free layout web content**, and **Picture on head layout web content**.
4. Select a template to present the web content by clicking one.
5. Enter values in the fields of the **Add New Document** form.
6. Click **Save** or **Save & Close** to save the content or **Close** to quit the **Add New Document** form.

### Tabs in the Add New Document form

#### The Main Content tab

Field	Description
<b>Title</b>	The title of the web content.
<b>Name</b>	The name of the web content that you want to add new.
<b>Language</b>	The language of the web content. At present, eXo Platform 3.5 supports two languages: English and French.
<b>Main Content</b>	The main content that you want to display when publishing this web content.

The **Illustration** tab allows you to upload an illustration that makes the site's content more attractive.



#### Details:

Field	Description
<b>Illustration Image</b>	The path to an image that you want to upload into a site. This image will be used like an illustration of that site.
<b>Summary</b>	You can give a short description about the web content because it will be displayed with the illustration image when the web content is listed. The main content will be shown when it is selected to be viewed.



## Upload an image

1. Browse a list of images on your local device by clicking the **Browse...** button, then select a specific location.
2. Select an image in the list to upload.

The **Advanced** tab includes two parts: CSS Data and JS Data.


**Details:**

Field	Description
<b>CSS Data</b>	Contain the CSS definition to present data in the web content. You can optionally enter CSS data into this field to specify the style.
<b>JS Data</b>	Contain the JS content to make the web content more dynamic after being published. You can optionally enter the JS content in this field.

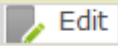
### 5.2.4.2. Edit/Publish/Delete web content

#### Edit web content

This function is used to edit web content in a specific drive of an existing site.

1. Go into the folder of a site which contains the web content that you want to edit.
2. Select the web content by double-clicking it in the left tree or in the right pane. The detailed information of web content will be viewed in the right pane.
3. Click  on the **Action** bar to show the form to edit the selected web content. This form is similar to that of creating a new document.
4. Make changes on current values in the fields of this form.
5. Complete editing the selected web content by clicking **Save** or **Save & Close**.

**Note**

When you click , the web content will be auto-locked for your editing. After finishing, the content is back to the unlock status. You can manage "Locks" in the [Unlock a node \[341\]](#) section.

**Publish web content**

This function helps you publish web content that you have added to a web content folder in **Sites Explorer**.

See the [Publication process](#) section to know how to publish web content.

After the content is published, all users who have the right to access that position can view the published web content as a page on the **Navigation** bar.


**Delete web content**

This function is used to remove web content from the web content folder in a specific site's drive.

1. Right-click the name of the web content that you want to delete, then select **Delete** from the drop-down menu.
2. Click **OK** to accept your deletion in the confirmation message.

**5.2.4.3. Preferences**

This function is used to set up your browsing preferences.

1. Click  on the right side of the **Sites Explorer** portlet.

The **Preferences** window will appear.

**Details:**


Field	Description
<b>Sort by</b>	Sort nodes in the nodes list by Alphabetic, Type, Created Date, or Modified Date.
<b>Show Sidebar</b>	Display/Hide the sidebar.
<b>Enable Drag &amp; Drop</b>	Enable/Disable the "drag and drop" action.
<b>Nodes Per Page</b>	This number of nodes displayed per page.
<b>Show Non-document Nodes</b>	Display/Hide nodes that are non-documents.
<b>Show Referenced Documents</b>	Display/Hide referenced documents.
<b>Show Hidden Nodes</b>	Display/Hide hidden nodes.
<b>Query Type</b>	This query type.
<b>Enable DMS Structure</b>	Display/Hide document nodes in the tree structure.

2. Configure the preferences as required and click **Save** to set them;  
Or, click **Close** to quit without submitting changes.

## 5.2.4.4. Search in Sites Explorer


### 5.2.4.4.1. Quick search













With the quick search, you can directly type a search term in the search field. All documents, whose keywords are matched with the search term, are retrieved and listed in the Search results form.

1. Enter a keyword into the search text box.
2. Click  to perform the search;

Or, press **Enter**.



The search results will be displayed in the right pane.

Search results      Search key exo 

Type	Name	Score	Action
	default.css <div><span>root default.css root <strong>exo</strong>:cssFile</span></div> Path: /sites content/live/acme/web contents/site artifacts/LinkHome/css/default.css Date created: 9/17/10 1:18 PM	418	 
	default.js <div><span>root default.js root <strong>exo</strong>:jsFile</span></div> Path: /sites content/live/acme/web contents/site artifacts/LinkHome/js/default.js Date created: 9/17/10 1:18 PM	418	 
	default.js <div><span>en root root <strong>exo</strong>:jsFile</span></div> Path: /sites content/live/acme/web contents/News/acme- news-2/js/default.js Date created: 8/10/10 12:11 PM	418	 
	default.js <div><span>root root <strong>exo</strong>:jsFile</span> </div> Path: /sites content/live/acme/web contents/News/acme- news-3/js/default.js Date created: 8/10/10 12:11 PM	477	 


The search results are empty if no document contains the search string.

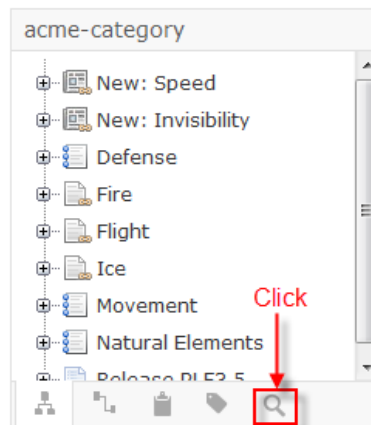
Type	Name	Score	Action
No results found.			

3. Click  to view the content containing the keyword;  
Or, click  to go to the node that contains the search result.

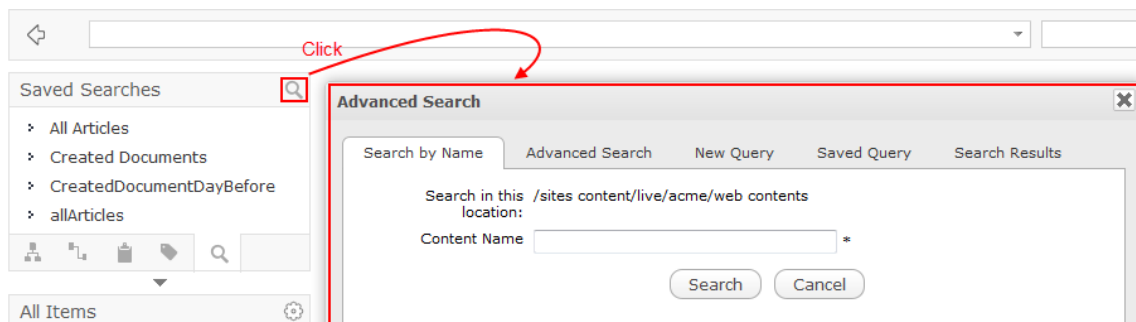
### 5.2.4.4.2. Advanced search

#### Perform an advanced search

1. Click  on the **Filter** bar.



2. Click  to open the **Advanced Search** form.



The tabs in this form offer different search functions:

- [Search by Name](#)
- [Search with constraints](#)
- [Search by creating a new query](#)
- [Search by existing queries](#)

#### 5.2.4.4.2.1. Search by Name

Use the **Search by Name** tab to search nodes by name as follows:

1. Enter the exact name you wish to search in the **Content Name** field.
2. Click **Search**.

Results will return with the message *"No result found"* if there is no node with the entered name.

Results will be returned in the **Search Results** tab if the requested name is found.

#### 5.2.4.4.2.2. Search with constraints

This search enables you to search with more constraints to limit the returned results.

Extra search constraints are entered in the **Advanced Search** tab of the **Advanced Search** form.

Advanced Search

Search by Name   Advanced Search   New Query   Saved Query   Search Results

Current location /sites/content/live/acme

A word or phrase in content  ← Enter keyword

Operator

More constraints

Show/Hide Constraint Form   Search   Save   Cancel

The **Current location** field is not editable. It shows the path selected to search.

1. Enter search terms in the **A word of phrase in content** field.
2. Select the **Operator**.
  - Select **AND** operator to only return results that meet *both* the search terms and the entered constraints (see Step 3).
  - Select **OR** operator to return results that meet *either* the search terms or the entered constraints (see Step 3).
3. Click **Show/Hide Constraint Form** to add more constraints.

A further constraint options window will appear.

Operator:  1

☐ Property:  Contain Exactly:  2

☐ Property:  Contain:  3

☐ Property:  Not Contain:  4




☐ Created  From  To  5

☐ Document Type:  6

☐ Category:  7

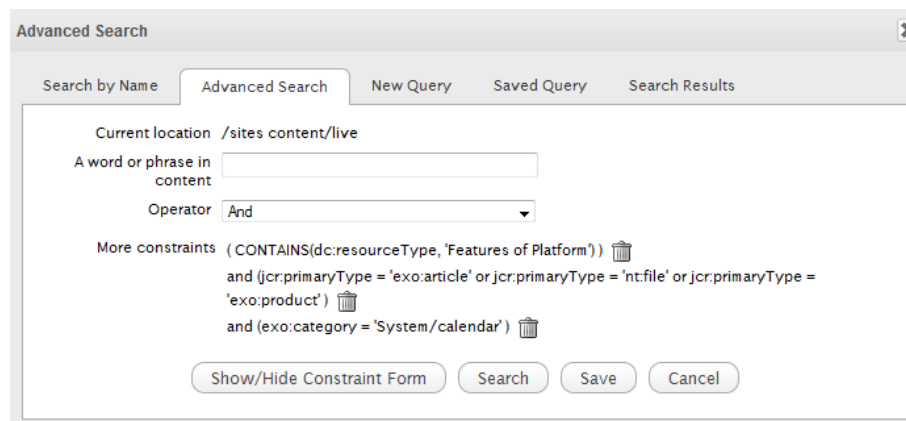
#### Details:


Item	Description
1	You can add more than one constraint with either of two operators (AND and OR).
2	Add a constraint to search by a property with specific values.
3	Add a constraint to search by a property that contains one of the word in the specific string.
4	Add a constraint to search by a property that does not contain the specific string.
5	Add a constraint to search by a duration of date (created, modified).
6	

Item	Description
	Add a constraint to search by a document type, including File, Article, Podcast, Sample node, File Plan, Kofax).
	Add a constraint to search by categories.
	Add a document type.
	Add a category.

4. Select the constraint operator (**AND/OR**).
5. Add the required constraints using one of the following methods:
  - [Add a constraint for exact values \[364\]](#)
  - [Add a constraint including or excluding values \[366\]](#)
  - [Add a constraint by date \[366\]](#)
  - [Add a constraint by document type \[367\]](#)
  - [Add a constraint by category \[368\]](#)
6. Click **Add** to add any/all activated constraints.


The constraints will be converted to an **SQL** query and displayed in the search form.




- Remove unnecessary constraints by clicking .
7. Click **Search** to launch the search. Results will be displayed in the **Search Results** tab.
  8. Click **Save** and put a name for this search configuration if you want to save it to use at another time.

**There are some methods to add the required constraints as follows:**

#### **Add a constraint for exact values**

1. Tick the checkbox that corresponds to the constraint you want.
2. Enter the property you want to locate, or click .


A list of possible properties appears.

3. Select a property from the list and click **Add**. The selected property will populate **Property** field.
4. Define the property value to search for by entering a value into the **Contain Exactly** field, or click .








The **Filter Form** will appear.

A dialog box titled "Filter Form" with a close button (X) in the top right corner. It contains a "Filter:" text input field with a small icon to its right. Below it is a "Results:" label followed by a large, empty rectangular area with a vertical scrollbar on the right. At the bottom of the dialog are two buttons: "Select" and "Cancel".

All pre-existing values for your selected property will appear.


- If the value you require is in the list, select it and click **Select**.
- If the value you require is not in the list, enter it in the **Filter** field and click . The value will populate the **Contain Exactly** field of the constraints form.

 A form titled "Constraints form" with an "Operator:" dropdown menu set to "And". It contains several rows of constraint fields, each with a checkbox:
 

- ☒ Property:   Contain Exactly:  
- ☐ Property:   Contain:
- ☐ Property:   Not Contain:
- ☐ Created  From  To
- ☐ Document Type:  
- ☐ Category:  

 At the bottom are "Add" and "Cancel" buttons.

### Add a constraint including or excluding values

1. Tick the checkbox corresponding to the **Contain** or **Not Contain** constraint, as appropriate.
2. Enter the required property in the **Property** field, or click  (refer to **Step 2** in the [Add a constraint for exact values \[364\]](#) section for more information).
3. Enter the required values in the **Contain** or **Not Contain** fields.

### Add a constraint by date

1. Tick the checkbox beside the field with the drop-down menu (below the **Property** entries).
2. Define the search condition from the drop-down list (**CREATED/MODIFIED**).
3. Click in the **From** field.

A small calendar will appear.



Operator: And

☒ Property: dc:title Contain Exactly: How to join us

☐ Property: Contain:

☐ Property: Not Contain:

☐ Created From 11/29/2011 To

☐ Document Type:

☐ Category:

Add Cancel

November - 2011

S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

Select the date you want to use as a constraint.

4. Repeat the above steps for the **To** field.

The selected dates will populate the **From** and **To** fields in the **Add constraint** form.

#### Add a constraint by document type

1. Tick the checkbox beside the **Document Type** field.
2. Enter the document type you want to search, or click to open a list of document types.

Select Node Type

kfx:document ☐

exo:htmlFile ☐

exo:cssFile ☐

exo:jsFile ☐

exo:siteSearchBox ☐

exo:pictureOnHeadWebcontent ☐

exo:webContent ☐

exo:siteNavigationWebContent ☐

exo:siteBreadcrumb ☐

exo:link ☐

exo:contact\_us ☐

exo:announcement ☐

exo:product ☐

Save Cancel

3. Tick the checkbox corresponding to your desired document type, then click **Save**.

The selected document type will populate the **Document Type** field.

Advanced Search

Current location /sites content/live/acme/web contents

A word or phrase in content

Operator And

More constraints

Show/Hide Constraint Form Search Save Cancel

Operator: And

☒ Property: dc:identifier Contain Exactly: exo

☒ Property: dc:creator Contain:

☒ Property: dc:description Not Contain:

☐ Created From 07/01/2012 To 07/27/2012

☒ Document Type: exo:article

☒ Category: System/calendar

Add Cancel

### Add a constraint by category

1. Tick the checkbox beside the **Category** field.
2. Enter the category you want to search, or click for a list of categories.

Add Category To Search

Select Category

Category Tree System

Root Tree

Name	Add
cms	
calendar	

Close

3. Click that corresponds to your desired category.
- The selected category will populate the **Category** field.

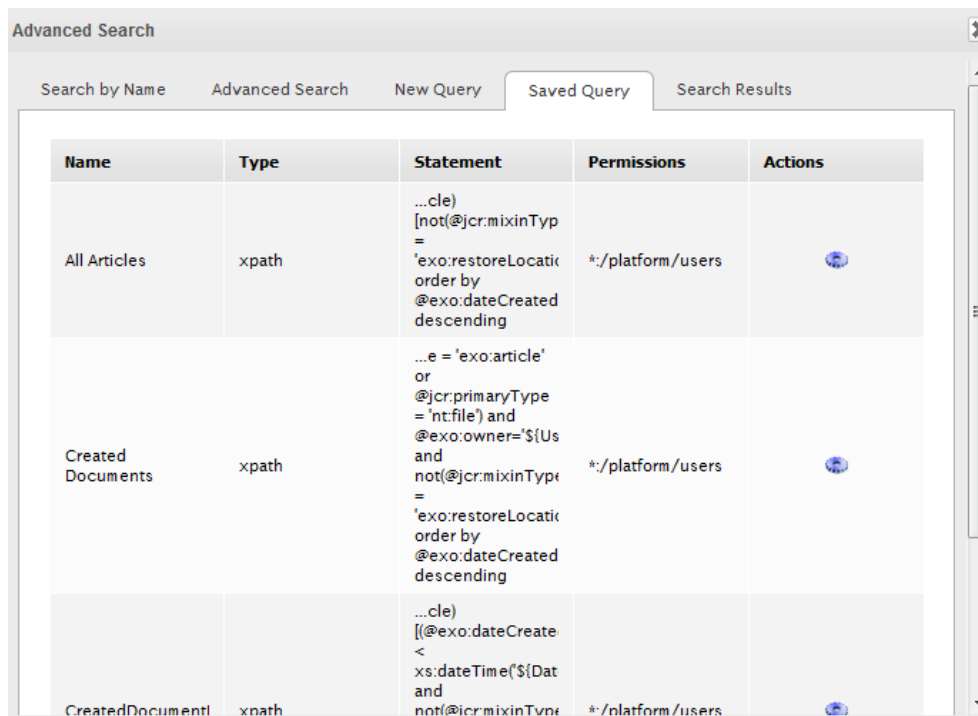
### 5.2.4.4.2.3. Search by creating a new query

You need a knowledge of the structure of query statements to configure a search using the parameters on the **New Query** tab.

1. Enter a unique name for this query in the **Name** field.
  2. Select a query type from the drop-down menu: **SQL** or **xPath**.
  3. Enter a query statement.
  4. Click **Search** to perform the search and display the results in the **Search Results** tab;
- Or, click **Save** to save the search query to the **Saved Query** tab;
- Or, click **Cancel** to quit.

### 5.2.4.4.2.4. Search by existing queries

This tab lists all saved search queries that you have access rights to use.

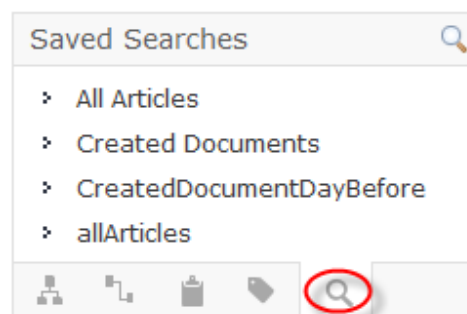


- Click to perform the search. You will see results in the **Search Results** tab.
- Click to edit the query statement. The query form will appear like when creating a query (see the [Search by creating a new query](#) section); however, you cannot edit the name of the saved search.
- Click to delete a query (provided you have the access rights to that query).

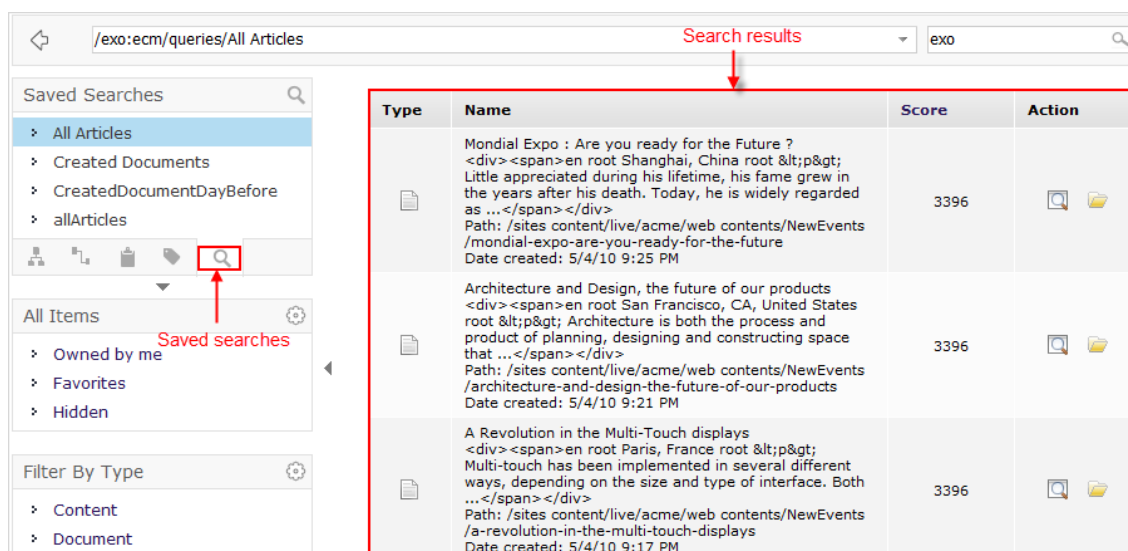
#### 5.2.4.4.3. Search with saved queries

Do the followings to perform a search with saved queries:

1. Click on the sidebar to see the list of existing queries.



A query list will appear. It contains the sections, including **All Articles**, **Created Documents**, **CreatedDocumentDayBefore** and **allArticles**.



2. Launch, modify or delete the queries as required (see the [Search by creating a new query](#) section for more information).
3. Filter results with the entries in the **All Items** and/or **By Type** panes on the left of the tab. Items matching the selections will appear in the right pane.
4. Click the required document or folder name to view or download them.

## 5.2.5. Manage content with WebDAV

### What is WebDAV?

**WebDAV** is an abbreviation of **Web-based Distributed Authoring** and **Versioning**. It is used to publish and manage files and directories on a remote server. It also enables users to perform these functions on a website.

WebDAV provides the following features:

#### Locking

This feature prevents two or more collaborators from overwriting shared files.

#### Site Manipulation

WebDAV supports the "copy" and "move" actions and the creation of *collections* (file system directories).

#### Name Space Management

This function enables copying and moving webpages within a server's namespace.

### Why use WebDAV?

With WebDAV, you can manage content efficiently with the following actions:

- Copy/paste content on your device and have those changes reflected in a host-based website.
- Manipulate actions on a website easily, quickly and flexibly without accessing it directly with web-browsers. Files can be accessed from anywhere and are stored as in local directories.
- Easily and quickly upload content to a website simply by copying it into the appropriate directory.

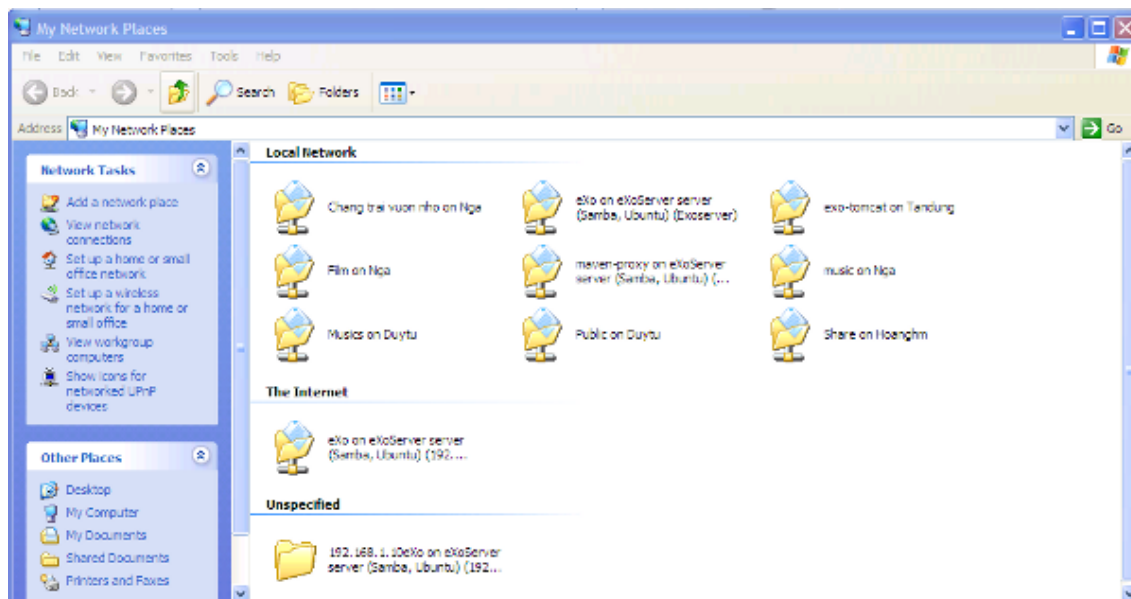
### 5.2.5.1. Use WebDAV in eXo Platform

To use WebDAV in eXo Platform, you first need to have the Internet or Intranet connected. Next, you can follow one of the two following ways:

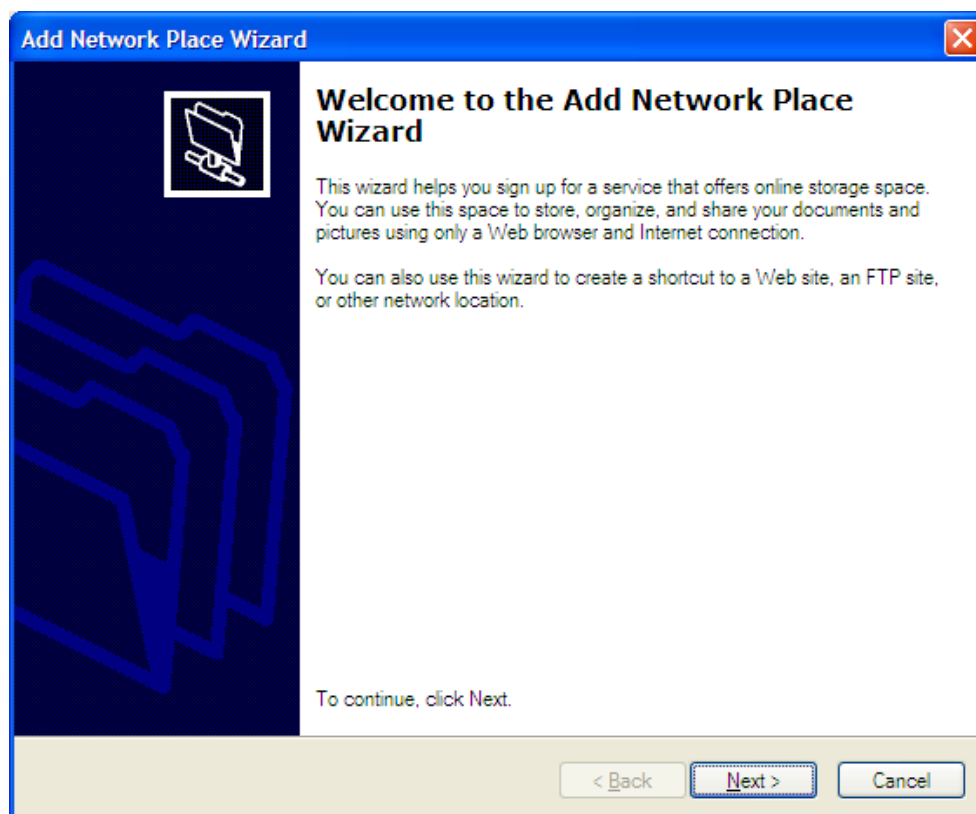
#### The first way

You need to connect to the WebDAV server. For example, for Windows XP, do the following steps:

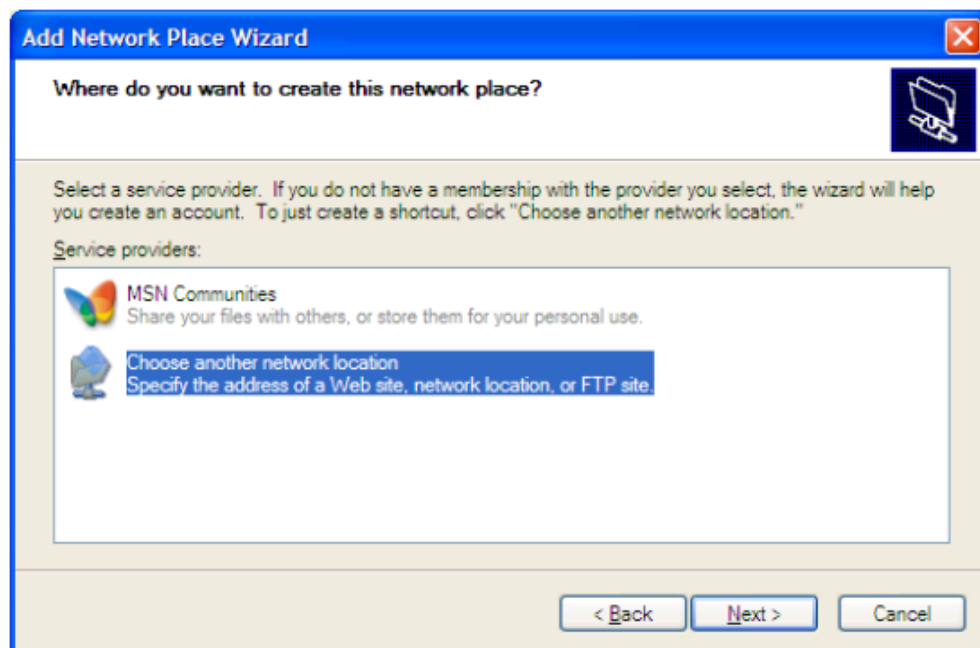
1. Navigate to the **My Network Places** on your local device. You will see all shared files and folders:



2. Click the **Add a network place** link on the left to open the **Add Network Place Wizard**.



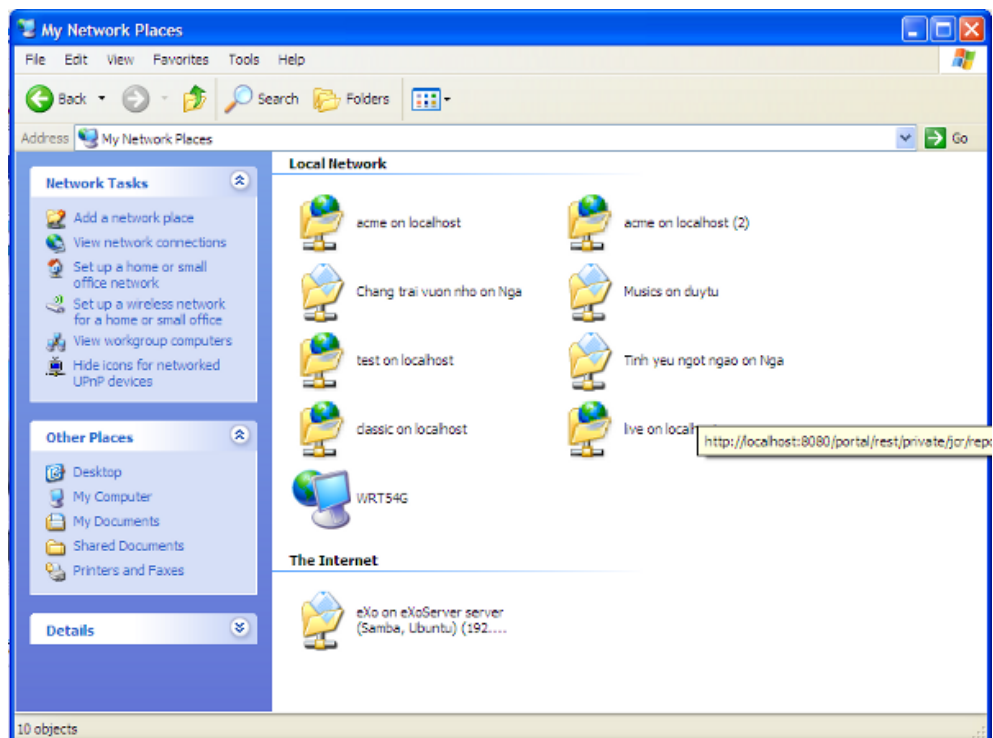
3. Click **Next** to select a network location:



4. Select **Choose another network location** to create a shortcut.
5. Enter an address into the **Internet or network address** field.

For example, the address of the *Acme* demonstration site is `http://mycompany.com:8080/portal/rest/private/jcr/repository/collaboration/sites/content/live/acme`.

6. Click **Next**. After a few seconds, a folder named **acme on localhost** appears in the **My Network Places** directory.




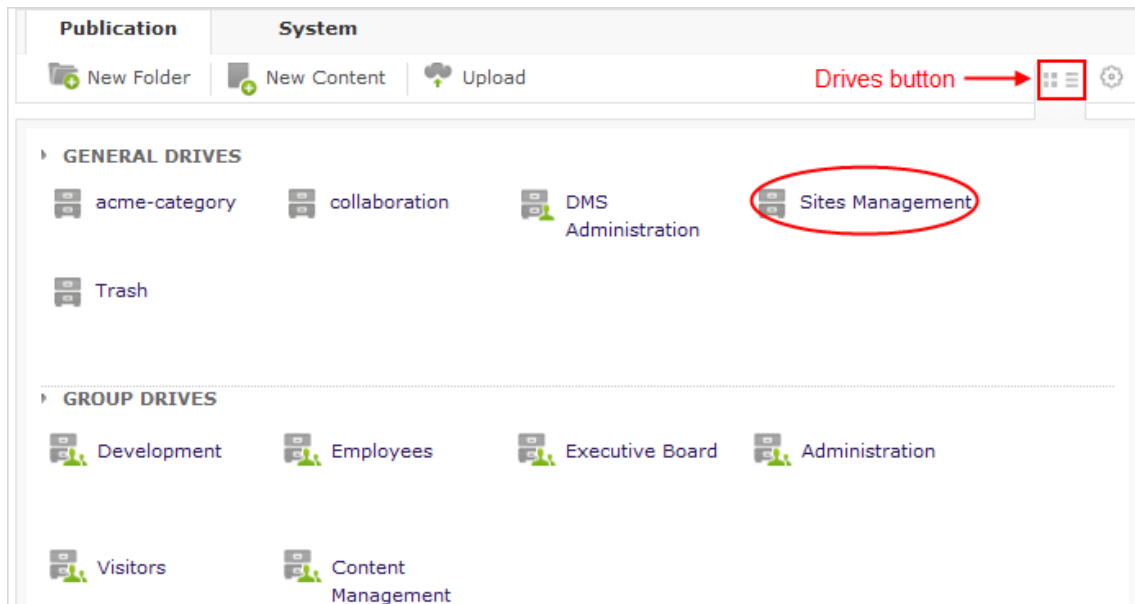
Each site managed by WebDAV appears as a folder in this location.

7. Take actions on the content in this folder to administrate the site content remotely.

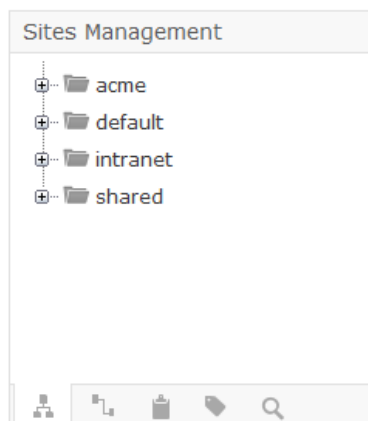
### The second way

This way can be done through **Sites Management**.

1. Hover your cursor over  on the **Administration** bar, then select **Content --> Sites Explorer** from the drop-down menu.
2. Click the **Drives** button, then select **Sites Management**.

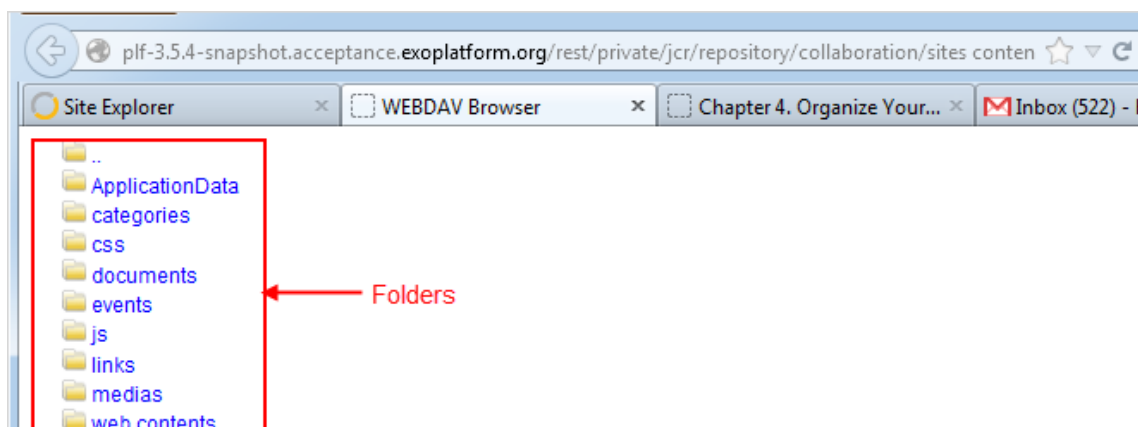


You will see all sites listed in the left sidebar.



3. Right-click your desired site to view with WebDAV, and select **Download and Allow Edition** from the menu.

The selected site will be shown in WebDAV.



In this view, you can access documents in the directories that are linked to the web server.

### 5.2.5.2. Add/Delete web content

#### Add new content to a specific site

This function enables you to copy web content, such as an *.html* file, from your local device to a *web content* folder of a site.

1. Access a site via WebDAV (refer to the [Use WebDAV in eXo Platform](#) section), then go to a **web content** folder of the site.
2. Copy the web content on your local system into this folder.

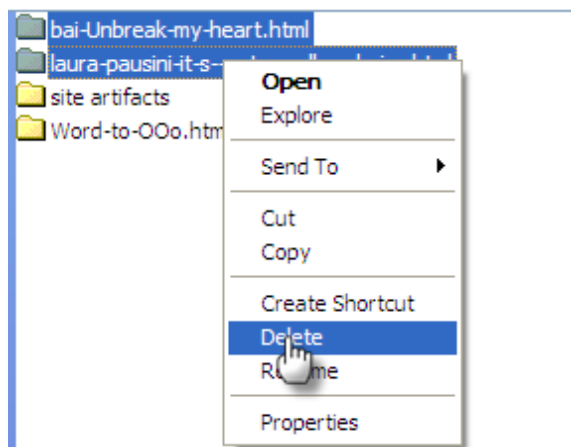
The copied file will be converted to web content that is viewable by WebDAV automatically. The content is converted to a directory containing *CSS*, *documents*, *js* and *media*.

After the new content is added, it can be viewed as a folder in WebDAV or as a page using a web browser.

#### Delete web content

This function enables site administrators to delete web content files separately or in batches.

1. Navigate to the folder that contains the content you want to remove.
2. Right-click the content files or directories (hold the *Ctrl* key to select multiple files at once), and select **Delete** from the drop-down menu.



The selected files will be removed from the site.

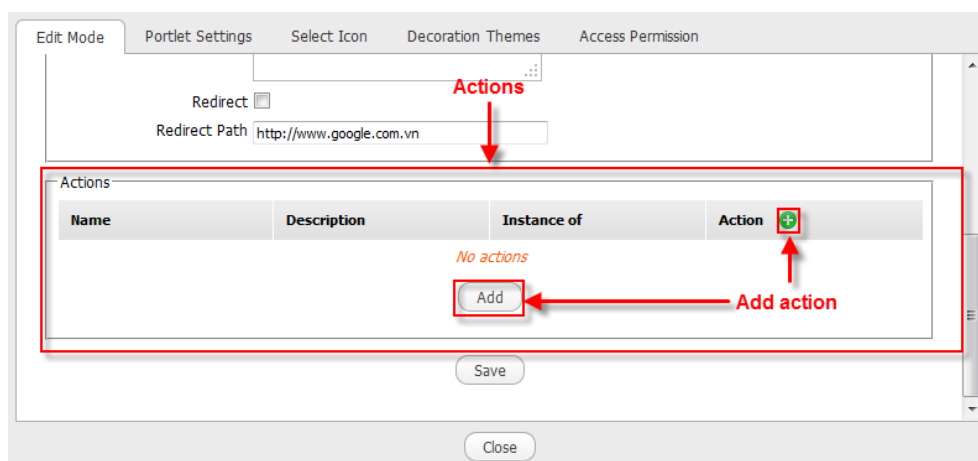
### 5.2.6. Manage content with Fast Content Creator


The **Fast Content Creator** portlet in eXo Platform enables you to quickly create and save a new document with only one template in a specific location without accessing **Sites Explorer**. This helps you save a lot of time when creating a new document.

There are two modes in **Fast Content Creator**: **Content Creator** and **Standard Content Creator**.

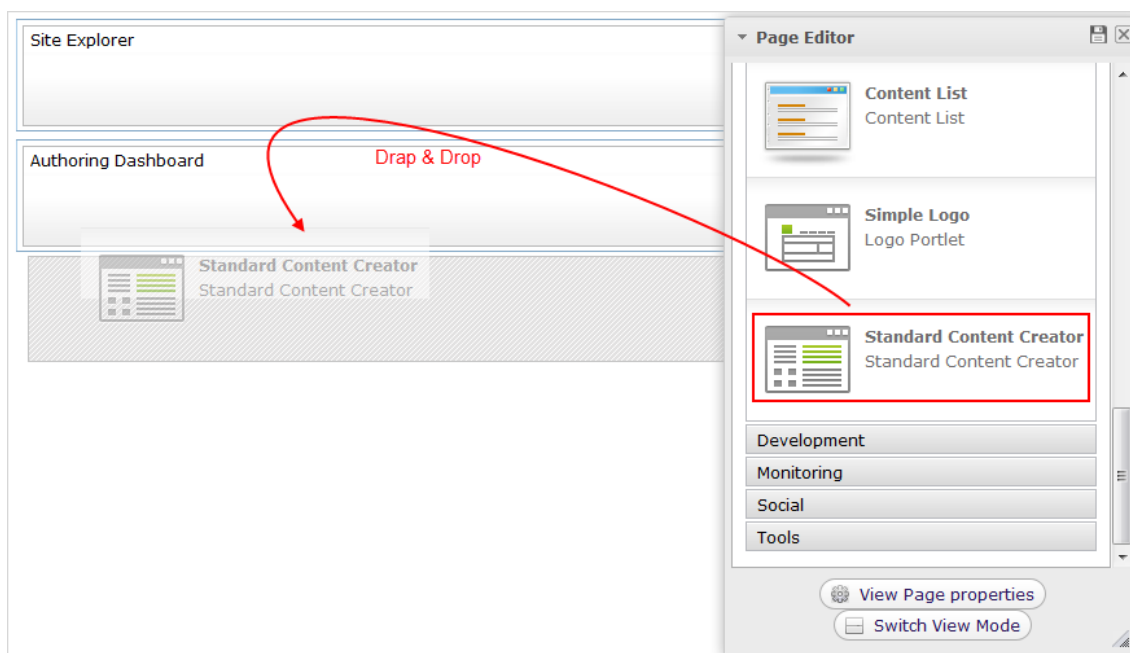
The **Standard Content Creator** mode allows you to add an action to your document. When [Configuring Fast Content Creator](#), the **Edit Mode** tab has the **Actions** part that allows you to add an action to the document and view actions added to the document.





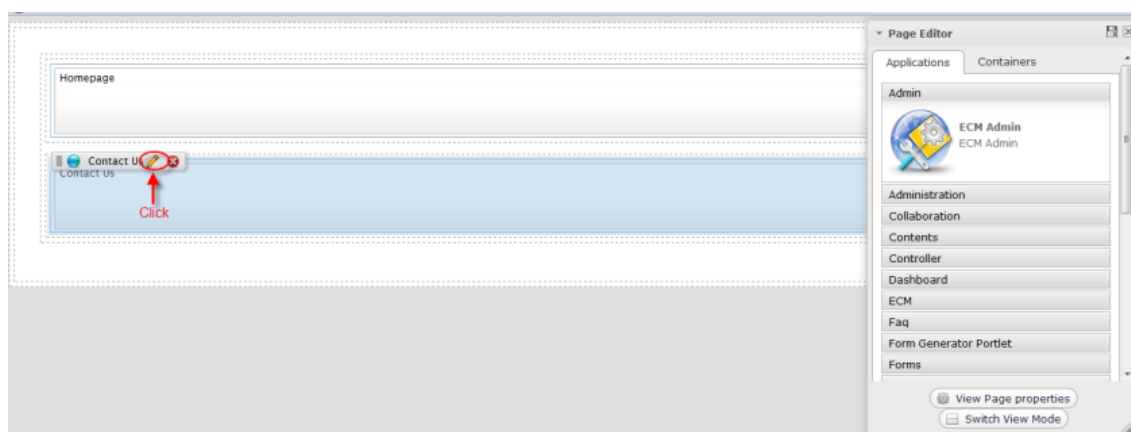
To add an action to a document, click **Add** or  to open the **Add Action** form. Do the same steps in the [Add an action](#) section.

To use the **Fast Content Creator** portlet, you need to add it to a specific page first by dragging and dropping **Content Creator** or **Standard Content Creator** from **Page Editor** --> **Applications** --> **Forms** to the main pane. This can be done when [creating a new page](#) or [editing an existing page](#) or [editing the layout of a portal](#).



### 5.2.6.1. Configure Fast Content Creator

In eXo Platform, the **Fast Content Creator** is applied in the **Question?** portlet with the **Content Creator** mode by default. Thus, in this guide, you are instructed how to configure the **Fast Content Creator** by editing the **Question?** portlet as an example.



1. Open the **Question?** page.
2. Hover your cursor over **Edit** --> **Page**, then click **Layout** on the **Administration** bar.

The edit page appear.

3. Hover your cursor over the portlet, then click  to edit the portlet.

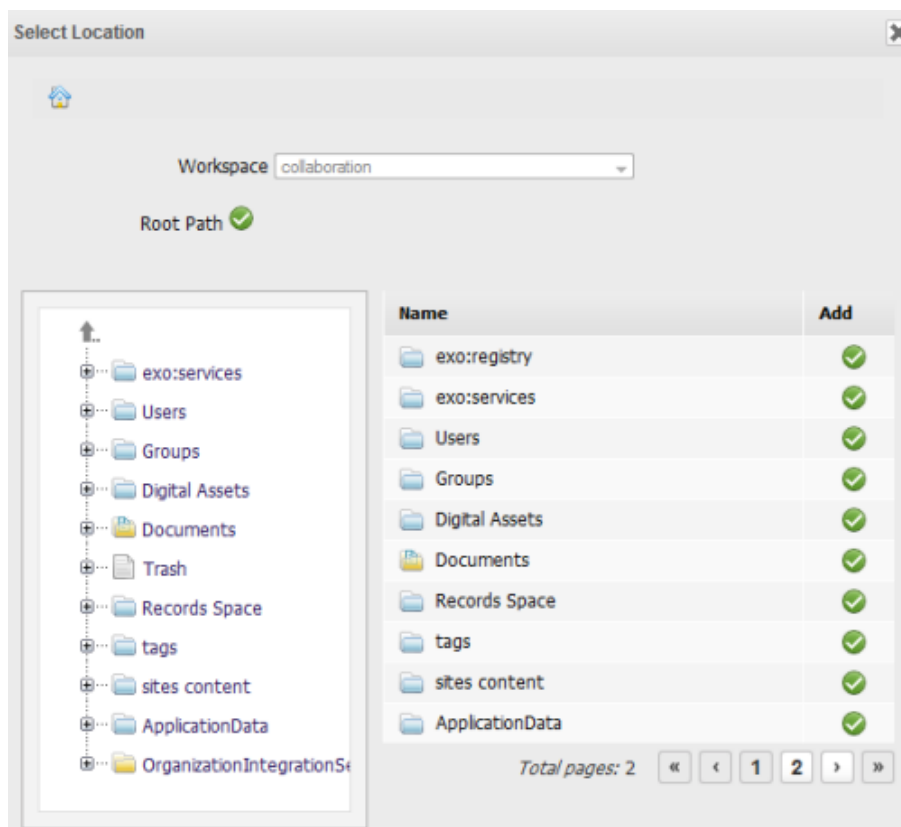
The form with the **Edit Mode** tab appears.


**Details:**

Field	Description
<b>Location to Save</b>	Select the location to save documents or messages.
<b>Select Template</b>	Select a template for the document. There are different input fields corresponding to each selected template.
<b>Custom Save Button</b>	Change the label for the "Save" button.
<b>Custom Save Message</b>	Change the content of custom message that informs you have just saved a document.
<b>Redirect</b>	Allow you to redirect the path in the <b>Redirect Path</b> field.
<b>Redirect Path</b>	Show a path to which you will be directed after clicking <b>OK</b> in the confirmation message.

4. Select a specific location to save documents.

- i. Click  to open the **Select Location** form.



- ii. Select the parent node in the left pane, then click  in the **Add** column to select the child node in the right pane. After being selected, this location will be displayed on the **Location to Save** field. Created documents will be saved in this location.

5. Select a template which is used to create a new document.
6. Change the label for the **Custom Save** button, and the content for **Custom Save Message**.
7. Tick the **Redirect** checkbox if you want to redirect to the path in the **Redirect Path** field after clicking **OK** in the confirmation message.
8. Click **Save** to finish the configuration of **Fast Content Creator**. Then, click **OK** in the notification message to accept your changes.
9. Click **Close** to quit the form to edit the configuration of **Fast Content Creator**.

### 5.2.6.2. Create/View content

#### Create new content

1. Go to your newly created page.
2. Fill values in all the fields in the page.
3. Click **Save** to accept creating the new document. A message appears to let you know that the document is created successfully at the location selected in the **Location to Save** field.

#### View content

After creating a new document by **Fast Content Creator**, you can view it as follows:

1. Go to **Sites Explorer**.
2. Select the drive and the path that you established in the configuration of **Fast Content Creator**. You will see this document.

## 5.2.7. Create content templates with Form Builder

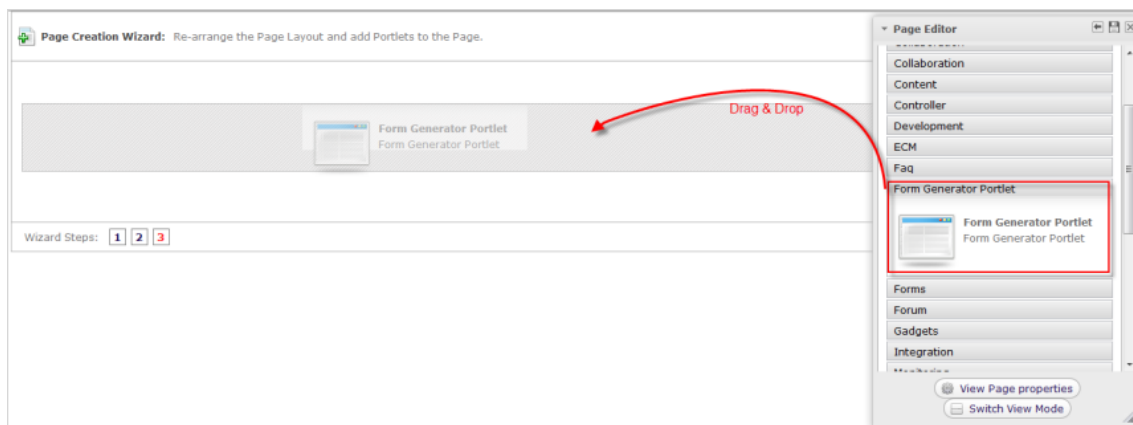


### Note

The **Form Builder** portlet is deprecated in eXo Platform. It remains fully supported for eXo customers, however it will not receive any enhancement and will be removed from the product scope in the future.

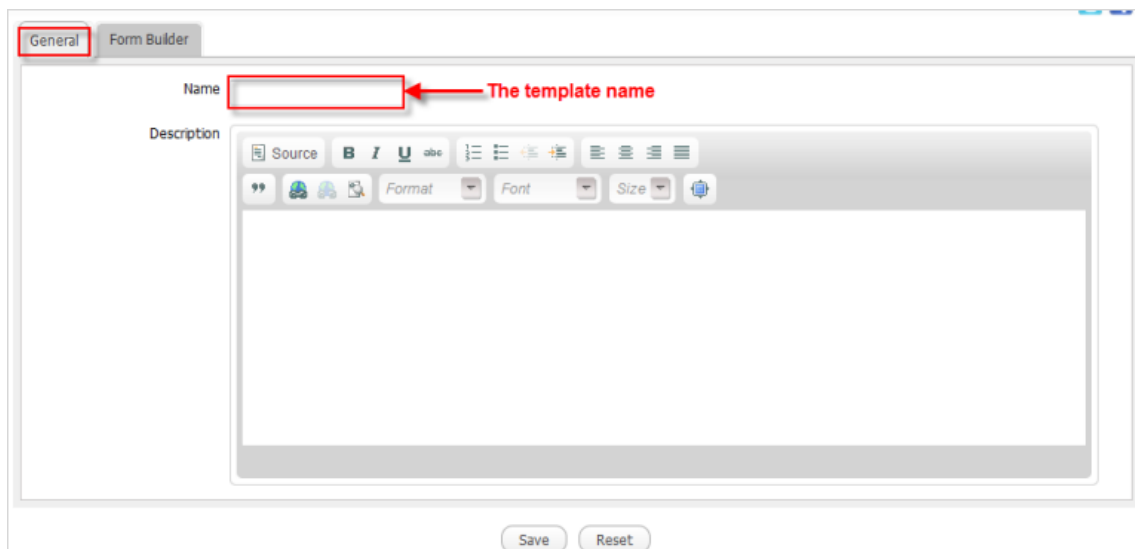
The **Form Builder** portlet allows users to create and edit the template of document types. Documents are stored in the so-called node; therefore, the term "node" and node types are often applied.

To use this portlet, you need to add it to a specific page first by dragging and dropping **Form Generator Portlet** from **Page Editor** --> **Applications** --> **Form Generator Portlet** to the main pane. This can be done when [creating a new page](#) or [editing an existing page](#) or [editing the layout of a portal](#).

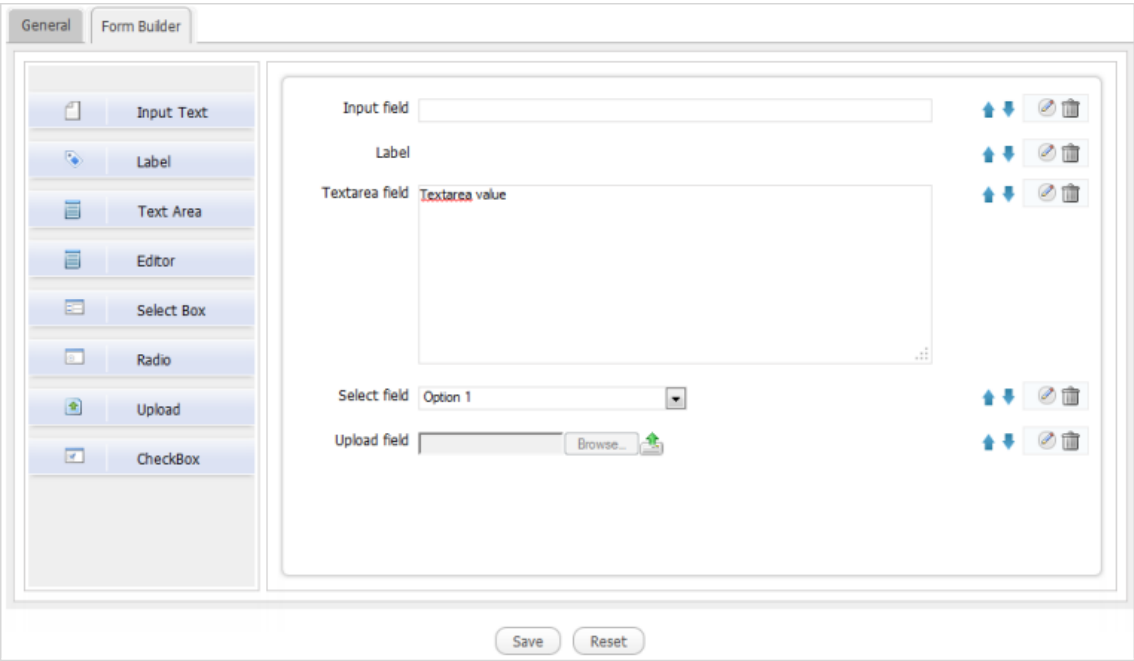


### Create a content template

1. Open the **Form Builder** portlet.



2. Enter the template name into the **Name** field which is required.
3. Enter a brief description about the template.
4. Click the **Form Builder** tab that allows you to set properties for the template. Available components are displayed in the left pane.



- 5. Click the desired components in the left pane. The selected components will be displayed in the right pane.
- 6. Click corresponding to the component to move this component up; or click to move the component down.
- 7. Click corresponding to the component to edit properties of that component. The form to edit properties appears like the illustration below.

Details:

Field	Description
Field Label	The label of the field.
Width	The width of the field width.
Rules: <input type="checkbox"/> Required	If the checkbox is marked, the asterisk ( * ) will appear beside the textbox, indicating that it is required to enter values in this field.
Height	The height of the field.
Default Value	Display the default value.
Guidelines for User	Display instructions about this component.

After editing the properties of the components, the components look like the below illustration.

- To delete the component, click corresponding to the component.
  - Click again to hide the form to edit the properties.
8. Click **Save** to accept creating a new template, or **Reset** to edit this template again before saving.
- A message will inform that you have created the template successfully.
  - After the template has been created, you will see it in the content template list when creating content.

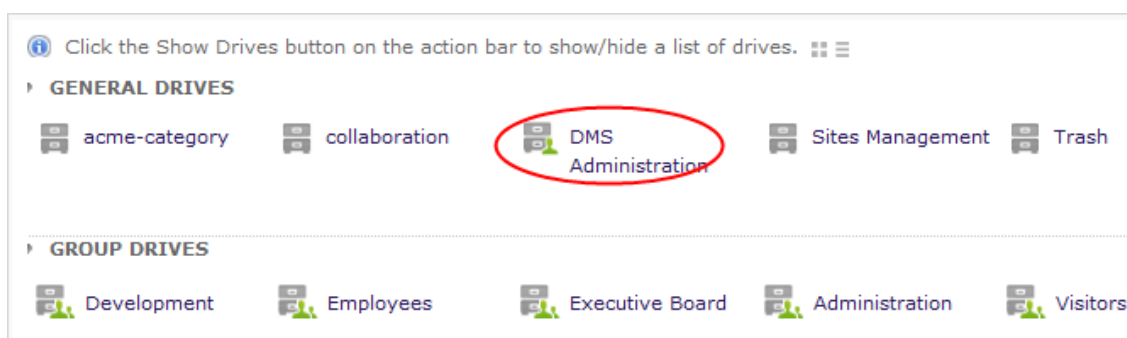
### 5.2.8. Manage CLV templates in Sites Explorer

This section will show you how to manage a template for a content list in the **DMS Administration** drive via the following topics:

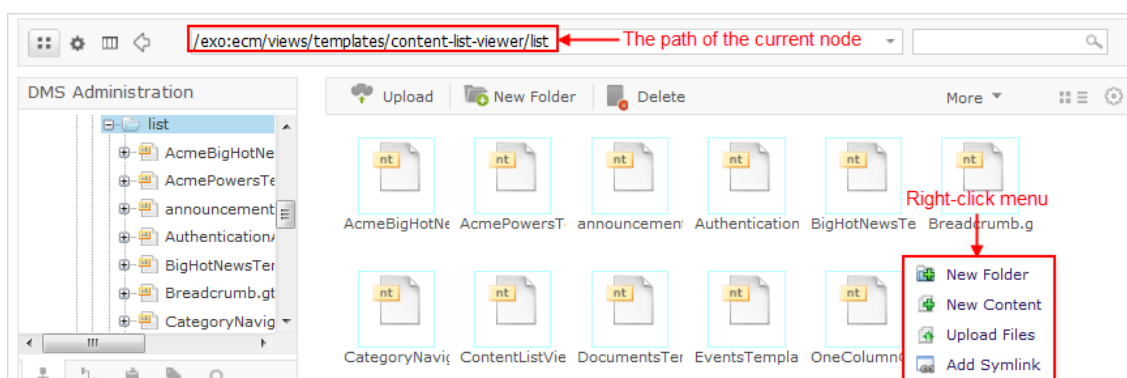
- [Create a CLV template \[380\]](#)
- [Edit a CLV template \[381\]](#)
- [Delete a CLV template \[381\]](#)

#### Create a CLV template

1. Access **Sites Explorer**, then select **DMS Administration**.



2. Click **exo:ecms --> views --> templates --> content-list-viewer --> list**.
3. Right-click in the white space, then select **New Content** in the menu; or select **New Content** on the **Action** bar.



4. Select **File** from the content templates list. The form to add the **File** document appears:

The screenshot shows a web form titled "File (Change Content Type)". At the top right are buttons for "Save", "Save & Close", and "Close". The form contains several input fields: "Name" (with a red box around it and a red arrow pointing to it labeled "The template name"), "Categories" (with a plus icon), "Mime Type" (a dropdown menu showing "application/x-groovy+html"), "Language" (a dropdown menu showing "en"), and "Content" (a large text area with a rich text editor toolbar and a code editor view showing CSS and HTML code). Below these are fields for "Title", "Description", "Creator" (with the value "John"), and "Source", each with a plus icon.

5. Enter all the fields in the form. The fields marked with the asterisk (\*) are required.  
In the **Mime Type** field, select **application/x-groovy+html** from the drop-down menu.
6. Click **Save** or **Save & Close** to accept creating the CLV template.



#### Note

See more details about the **File** document in the [Create a new File document \[269\]](#) section.

#### Edit a CLV template

1. Click **exo:ecms --> views --> templates --> content-list-viewer --> list** in the **DMS Administration** drive.
2. Right-click a template that you want to edit, then select **Edit** from the drop-down menu.
3. Edit your desired fields, then click **Save** or **Save & Close** to accept your changes.

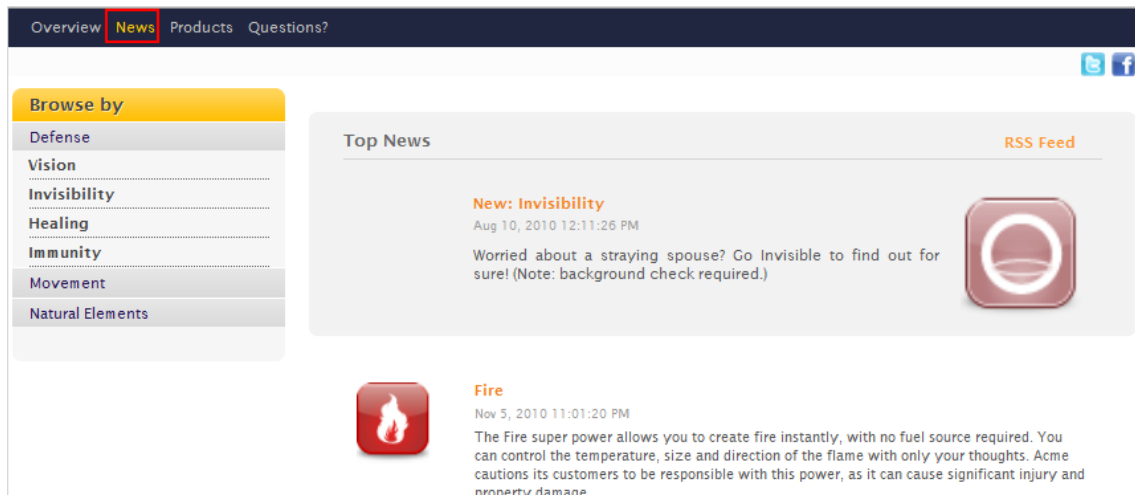
#### Delete a CLV template

1. Click **exo:ecms --> views --> templates --> content-list-viewer --> list** in the **DMS Administration** drive.
2. Right-click a template that you want to delete, then select **Delete** from the drop-down menu.
3. Click **OK** in the confirmation message to accept your deletion.

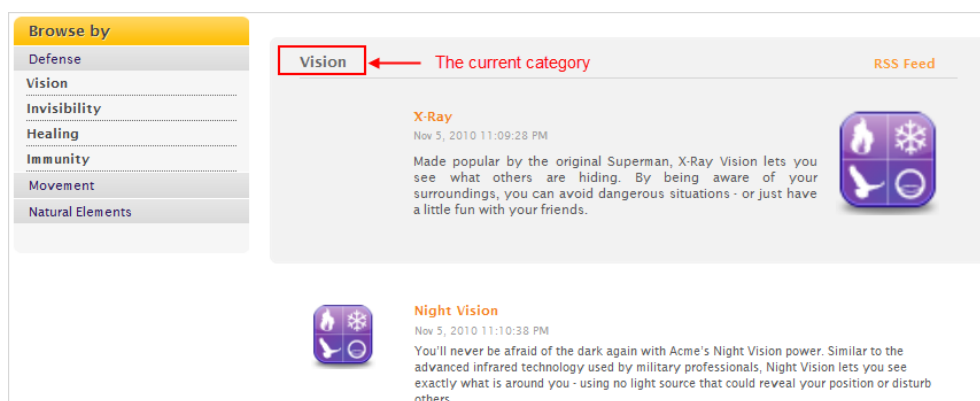
## 5.2.9. Manage Category Navigation

**Category Navigation** and **Parameterized Content List Viewer** portlets get rid of long URLs when you view content and enable users to see published documents or web content in specific categories in one page. Thanks to the symbolic link, no matter where the object physically resides, the database can retrieve it. In addition, the relations amongst shortcuts can be managed. Now, you can view documents or web content in the **Parameterized Content List Viewer** easily.

#### Access the Category Navigation portlet

1. Go to **News** on the **Navigation** bar.

- The left pane lists all the categories containing documents or web content.
  - The right pane displays the documents selected in the left pane.
2. Select a category that you want to view on the left. The selected category will be shown on the right (only documents or web content published are shown).



### Configure Category Navigation

Administrators can edit the **Category Navigation** portlet as follows:

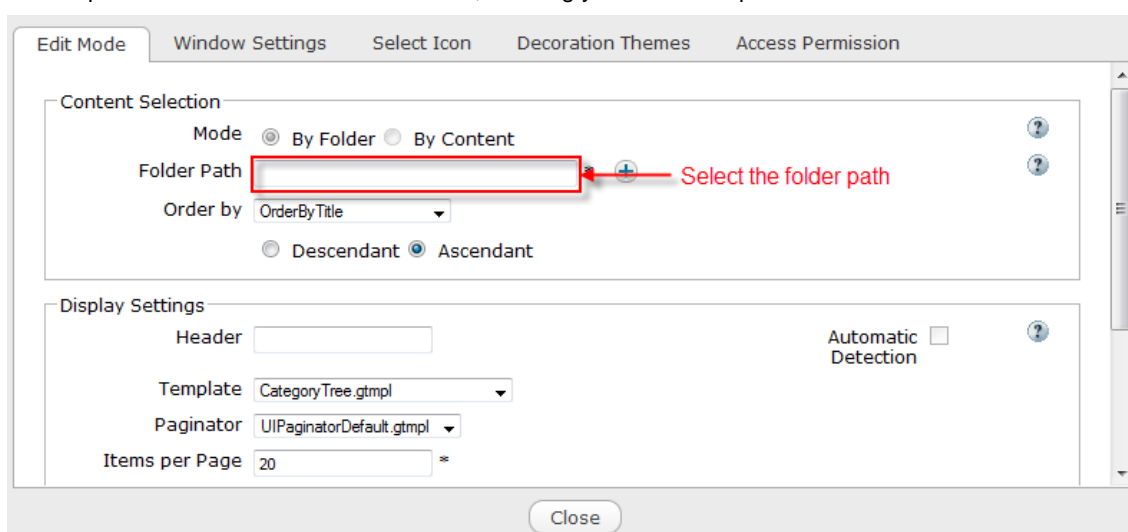
1. Open **News** page on the **Navigation** bar.
2. Hover your cursor over **Edit --> Page**.

The page which allows you to edit the **Category Navigation** portlet will appear.





- Click to open a form with the **Edit Mode** tab, allowing you to edit the portlet.



- Click to select the folder path which restores content you want to display.
- Edit some fields in the **Display Settings** part as you want. See more details in the [Content List Preferences \[349\]](#) section.
- Click the **Advanced** link to set up some properties for the portlet. See more details [here](#).
- Click **Save** to accept saving the configuration for the **Category Navigation** portlet.
- Click **Close** to quit the form.
- Click on the **Page Editor** form to finish editing the **Category Navigation** portlet.



#### Note

In the **Edit Mode** tab, some options are disabled.

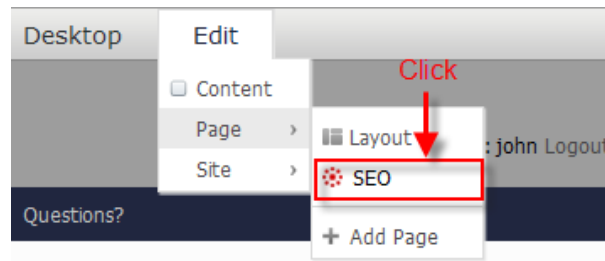
## 5.2.10. Manage SEO

SEO (Search Engine Optimization) allows you to improve the visibility of your webpages and web content in the major search engines (Google, Yahoo, MSN, Live) via the search results. The higher your website position is in the search engine results page, the more visitors access it. Therefore, it is very important for you to maximize your webpages and content's position in the search engines.

In eXo Platform, the **SEO Management** feature is featured to meet this target. By using **SEO Management**, you can easily manage SEO data of web pages and web content and optimize your website for search engines.

### Manage the SEO data

1. Open a page or content that you want to edit the SEO data.
2. Open the **SEO Management** form by hovering your cursor over **Edit --> Page --> SEO** on the **Administration** bar.



Depending on your SEO management for a page or content, the content of the **SEO Management** form will be different.

- The **SEO Management** form for content is as follows.

A screenshot of the 'SEO Management' form for content. The form has a title bar with a close button. It contains two text input fields: 'Description:' and 'Keywords:'. At the bottom, there are 'Save' and 'Cancel' buttons.

- The **SEO Management** form for a page is as follows.

A screenshot of the 'SEO Management' form for a page. The form has a title bar with a close button. It contains two text input fields: 'Description:' and 'Keywords:'. Below these, there are several settings: 'Robots:' with 'INDEX' and 'FOLLOW' dropdowns, 'Sitemap:' with a checked 'Visible in sitemap' checkbox, 'Frequency:' with 'Always' dropdown, and 'Priority:' with '1.0' input. At the bottom, there are 'Save' and 'Cancel' buttons.

### Details:

Field	Description
<b>Description</b>	The description of your page/content. This description will be seen in the results list of search engines.
<b>Keywords</b>	By using these keywords, other users can find out your page/content via search engines.
<b>Robots</b>	<p>Search engines can access the whole directories on a website, or individual pages, or individual links on a page and list your page/content or not, it depends on your options:</p> <ul style="list-style-type: none"> <li>• <b>INDEX</b>: Allow search engines to index your page/content on the search engine results page.</li> <li>• <b>NOINDEX</b>: Restrict search engines from indexing your page/content on the search engine results page. Use this option if you want to keep your page private.</li> <li>• <b>FOLLOW</b>: Allow search engines to follow links from your page to find other pages.</li> <li>• <b>NOFOLLOW</b>: Restrict search engines from following links from your page to find other pages. Use this option if you want to prevent spam links in comments of blogs, forums and others.</li> </ul>
<b>Sitemap</b>	Allow you to see pages of the sites in the tree-like structure.
<b>Frequency</b>	Show how often pages are updated on the site. Also, setting your frequency levels tells the search engines which pages should be crawled over other pages. The frequency levels include: Always, Hourly, Daily, Weekly, Monthly, Yearly and Never. If you set "Never" for the frequency level, meaning that this page never gets updated, so search engines will move onto other pages that get updated more frequently.
<b>Priority</b>	Allow search engines to search the page with the higher priority level first. The acceptable value in this field is from 0 to 1. In which, 0 is the lowest priority level and 1 is the highest.

- Fill out all the fields in the form.
- Click **Save** to finish creating SEO data.



#### Note



means that the SEO information is empty.



means that the SEO information has been updated but some information are not filled out yet.



means that the **SEO Management** form is filled out with the full SEO information.



means that the **SEO Management** feature is disabled.

## 5.2.11. Search content in a site

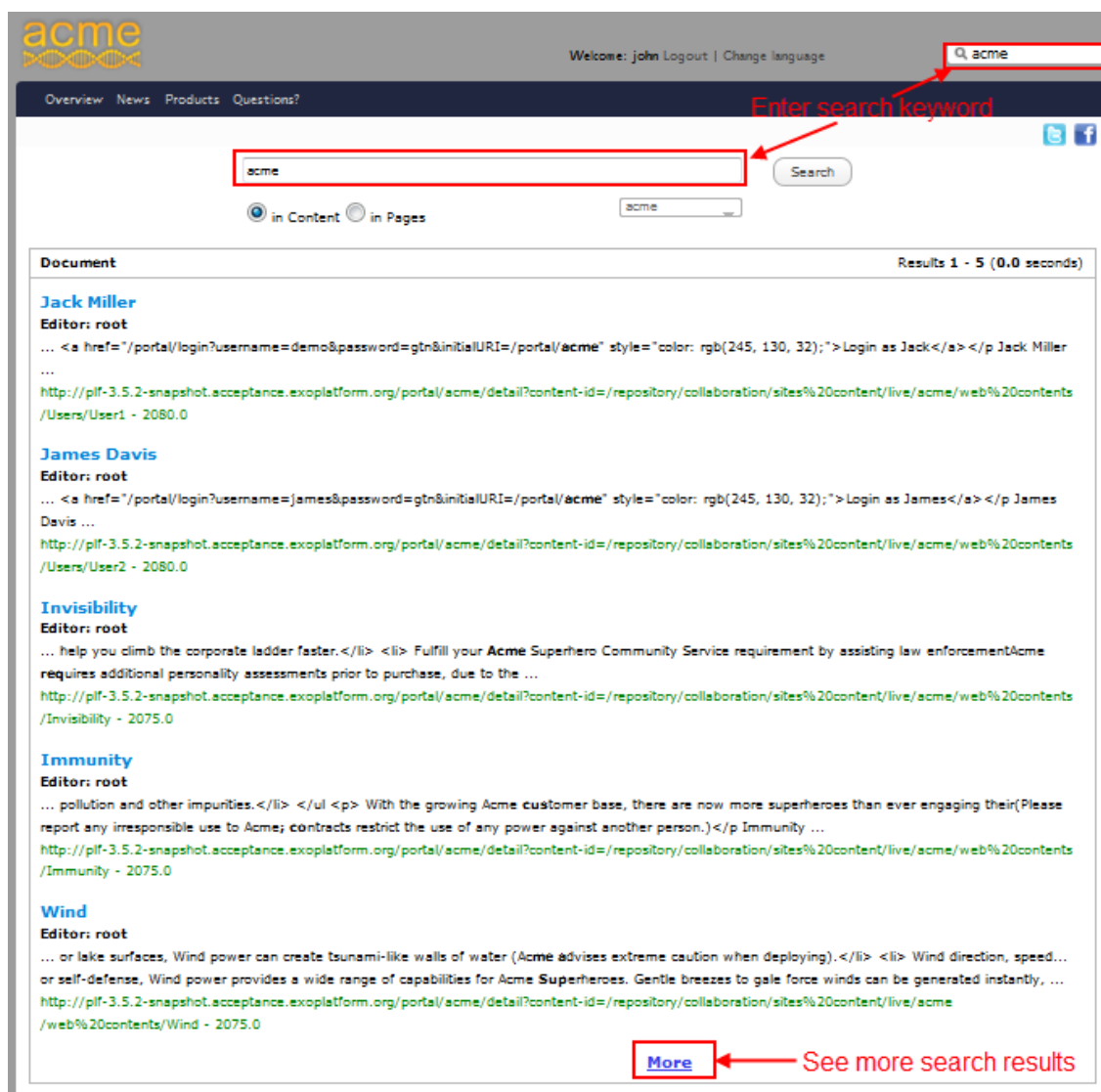
The **Search** function allows you to quickly search for any content in the system with a keyword from the front page, even if you do not log in. However, the number of the search results displayed depends on your role.

For example, if you do not log in, you only see the search results that are published.

### 5.2.11.1. Search for content

1. Enter a keyword into the search box and press **Enter**.

The search results matching with your keyword are displayed in the search page:



In case of no search results matching the keyword, the search page is displayed as below:

**Details:**

Field	Details
<b>in Content</b>	Search all <b>published content</b> of search index areas that contain the keyword.
<b>in Pages</b>	Search all <b>SEO data [384]</b> (description, keyword) and pages that have <b>titles</b> or <b>names</b> matching the keyword.


2. In the Search form, you can enter another keyword and set the search scale.
3. Press **Enter**, or click **Search** to start searching.

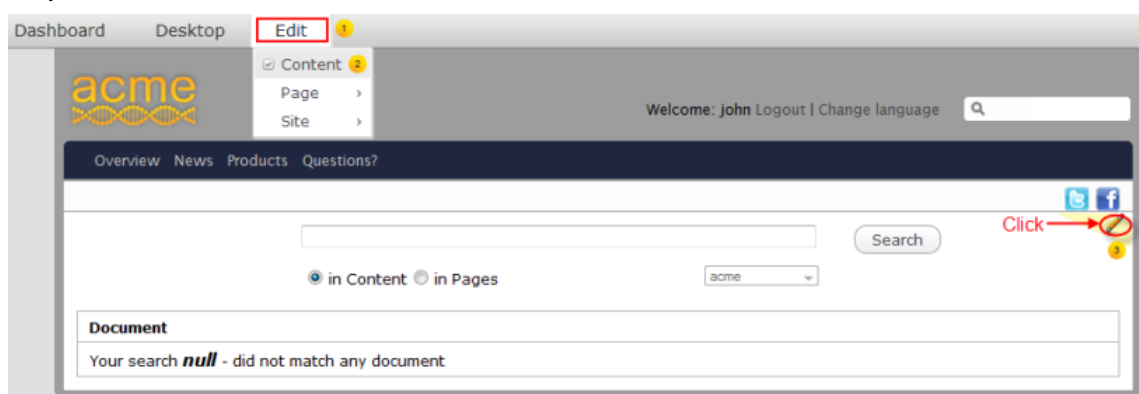
### 5.2.11.2. Edit the Search portlet

Editing the Search portlet allows you to change the display of search results.

1. Open the Search page as in [Section 5.2.11.1, "Search for content"](#).
2. Open the **Edit Mode** of the **Search** portlet by following one of two ways:

- **The first way**

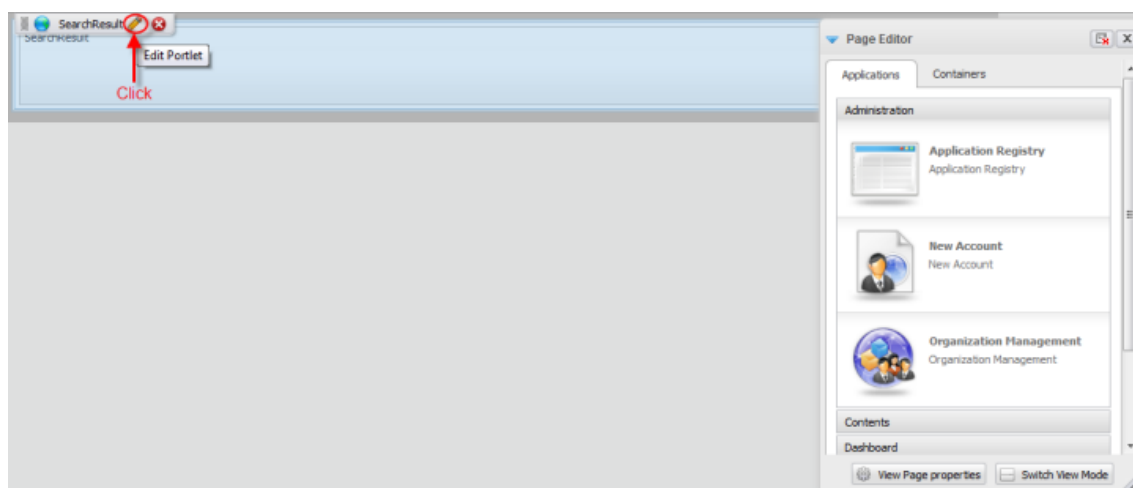
Hover your cursor over **Edit --> Content** on the **Administration** bar, and then click .



- **The second way**

Hover your cursor over **Edit --> Page --> Layout** on the **Administration** bar. The **Page Editor** will be displayed.

- Hover your cursor over the **SearchResult** portlet and click  to edit the portlet.



The **Edit Mode** of the **Search** portlet appears.

Items per Page	5
Page Mode	More
Search Form Template	UIDefaultSearchForm.gtmpl
Search Result Template	UIDefaultSearchResult.gtmpl
Search Page Layout Template	UISearchPageLayoutDefault.gtmpl
Base Path	detail
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

**Details:**

Field	Details
<b>Items per Page</b>	The number of search results displayed in each page.
<b>Page Mode</b>	<p>The way to display the search results. There are 3 options:</p> <ul style="list-style-type: none"> <li>• <b>None</b>: Only the first page of search results is displayed in the search page.</li> <li>• <b>More</b>: When you click the <b>Search</b> button, the first page of search result is displayed. The difference from the <b>None</b> mode is that, there is a <b>More</b> button allowing you to see more search results. When clicking this button, new search results are appended to the current search result page like Twitter or Facebook behavior.</li> <li>• <b>Pagination</b>: In this mode, the search results are divided into many pages (for example, 1, 2, 3 and Next). You can navigate to another page by clicking the page number or <b>Next</b> in the bottom of the Search portlet to view more results.</li> </ul>
<b>Search Form Template</b>	The template of the Search form.
<b>Search Result Template</b>	The template for displaying the search results.
<b>Search Page Layout Template</b>	The layout of the Search portlet.

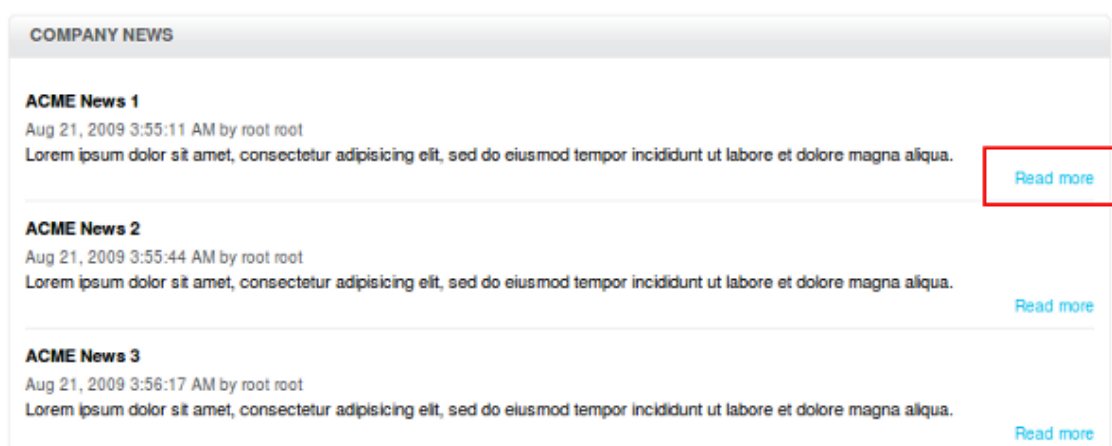
Field	Details
Base Path	The page where you can see the content of a search result.

3. Edit your desired portlet and click **Save** to accept your changes.

### 5.2.12. Print content

Users can easily print any content in a site by following these steps:

1. Click **Read more** to read all the content of a document or of an article in a site.



2. Click the **Print** button. The **Print Preview** page will be displayed on another tab.
3. Click **Print** to print the content of this page, or **Close** to close this tab without printing.

## 5.3. Manage newsletters

- [Newsletter viewer](#)

Step-by-step instructions on how to subscribe your email to get newsletters from eXo Service.

- [Newsletter Manager](#)

The ways to add the **Newsletter Manager** portlet to a specific page, actions to manage categories in **Newsletter**, ways to add a new subscription, steps to view/edit/delete/create a newsletter or to convert a newsletter as template.

eXo Platform provides the **Newsletters** service, aiming at helping users quickly get the updated newsletters from a website.

See also

- [Structure content](#)
- [Manage content](#)
- [Manage workflows](#)

### 5.3.1. Newsletter viewer



#### Note

The **Newsletter** portlet is deprecated in eXo Platform. It remains fully supported for eXo customers, however it will not receive any enhancement and will be removed from the product scope in the future.

With **Newsletters**, you can instantly get newsletters from your email to update the last information about categories and subscriptions.

### Subscribe your email to get newsletters from eXo Service

1. Go to **Newsletters** on the **Navigation** bar. The **Newsletters** page will appear.

2. Enter your email address in the **Your Email** field.
3. Select the checkbox corresponding to the subscription that you want to get newsletters.
4. Click **Subscribe**. A message informing that you have just subscribed to the selected newsletter will appear.
5. Click **OK** in the confirmation message. You can reselect the subscription that you want or do not want to receive newsletters by re-selecting the checkbox in the **Check to subscribe** column.
6. Click **Change your subscriptions** to update your changes.
7. Click **Forget this email** if you want to unsubscribe from newsletters.

### 5.3.2. Newsletter Manager



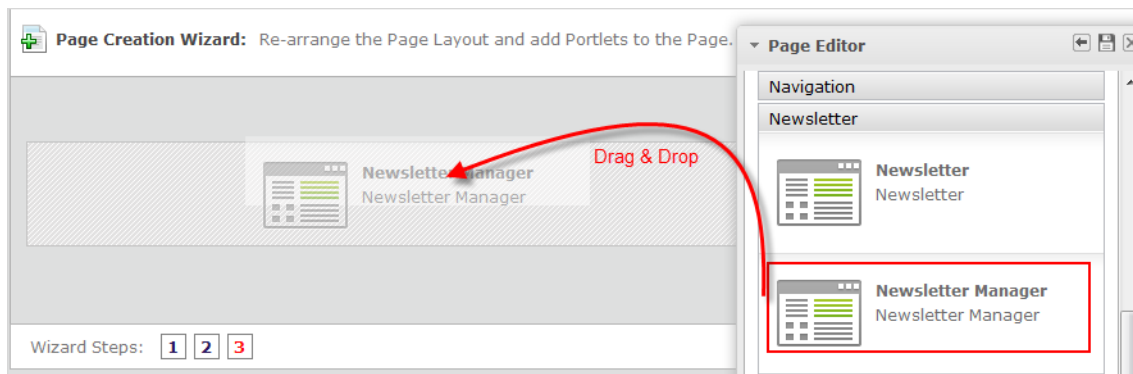
#### Note

The **Newsletter Manager** portlet is deprecated in eXo Platform. It remains fully supported for eXo customers, however it will not receive any enhancement and will be removed from the product scope in the future.

eXo Platform facilitates administrators to easily and quickly manage newsletters.

To use this portlet, you first need to add it to a specific page by dragging and dropping **Newsletter Manager** from **Page Editor** to the main pane. This can be done when [creating a new page](#) or [editing an existing page](#) or [editing the layout of a portal](#).





### Note

In eXo Platform, the **Newsletter Manager** portlet is put in **Page Editor --> Applications --> Newsletter**.

Access the page with the **Newsletter Manager** portlet to open the **newsletter** page.

The screenshot shows the 'newsletter' page with a toolbar containing 'New Letter', 'New Subscription', 'New Category', and 'Manage Users'. The 'General' tab is active, showing 'General information about us' and a table with subscription data.

Subscription	Number of User	Pending Letter
acme Trainings	1	0
acme Newsletters	3	0

The 'Corporate' tab is also visible, showing 'You want to know where we are, ...' and another table with subscription data.

Subscription	Number of User	Pending Letter
Results	2	0

## 5.3.2.1. Manage categories in Newsletter

### 5.3.2.1.1. Add a new category

1. Click **New Category** on the Action bar of the **Newsletter** page. The **Create New Category** form will appear.

The screenshot shows the 'Create New Category' form with the following fields:


- Name:** FAQ \*
- Title:** FAQ \*
- Description:** The questions related to the product....
- Moderator:** manager:/platform \* (with user icons and a trash icon)

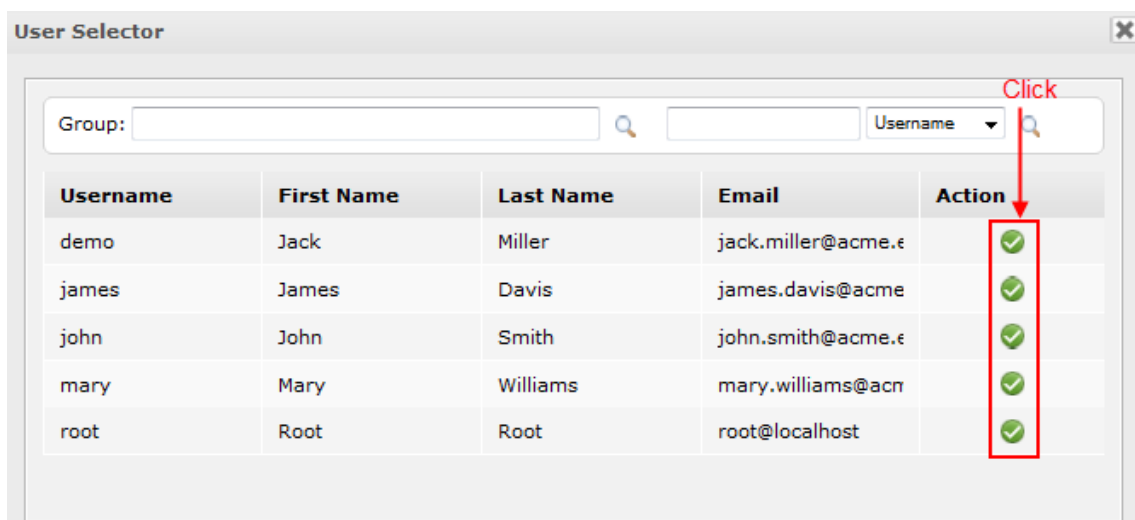
Buttons for 'Save' and 'Cancel' are at the bottom.

**Details:**

Field	Description
<b>Asterisk (*)</b>	This mark next to each field means that it is required to enter values into that field.
<b>Name</b>	The name of a category.
<b>Title</b>	The title of a category.
<b>Description</b>	A brief description of the category.
<b>Moderator</b>	Select users/groups who have rights to manage this category.

2. Input values into fields.


i. Select a moderator for a category by clicking  next to the **Moderator** field to open the **User Selector** form.




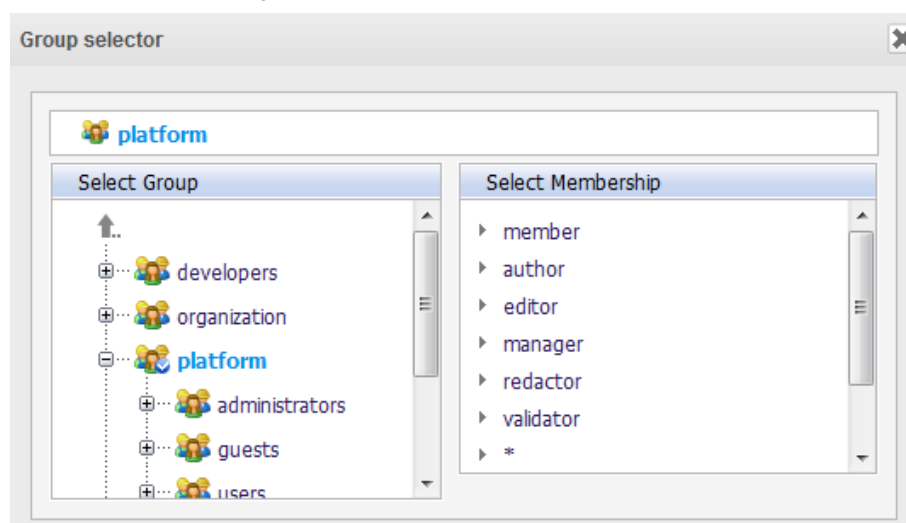
The **User Selector** dialog box contains a search bar with 'Group:' and 'Username' fields. Below is a table of users:

Username	First Name	Last Name	Email	Action
demo	Jack	Miller	jack.miller@acme.e	
james	James	Davis	james.davis@acme	
john	John	Smith	john.smith@acme.e	
mary	Mary	Williams	mary.williams@acm	
root	Root	Root	root@localhost	

A red arrow labeled 'Click' points to the checkmark icon in the 'Action' column for the 'demo' user.

- Click  corresponding to a user in the list that you want to select.

ii. Click  to select users in a specific group. The **Group selector** window will appear.



The **Group selector** dialog box has two panes:

- Select Group:** A tree view showing a hierarchy of groups: platform (selected), developers, organization, administrators, guests, and users.
- Select Membership:** A list of membership types: member, author, editor, manager, redactor, validator, and \*.

- Select a group from the left pane and a membership type from the right pane.

The membership and group selected will be displayed in the **Moderator** field.

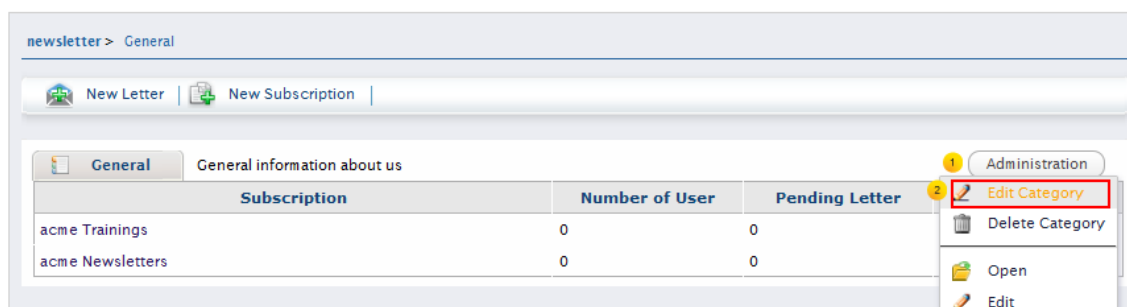
- Click **Save** to accept creating a new category.

You will see your added category in the list of categories.

- After creating a category, you can create new subscriptions or newsletters for this category.
- When clicking the **Administration** button, you will see a drop-down menu consisting of all actions on this category.

### 5.3.2.1.2. Edit a category

- Select a category that you want to edit.
- Click **Administration --> Edit Category** from the drop-down menu.



The **Create New Category** form appears.

- Change the values in the **Title** and **Description** fields as required.

**Note**

The category name cannot be changed.

- Click **Save** to save all changes.

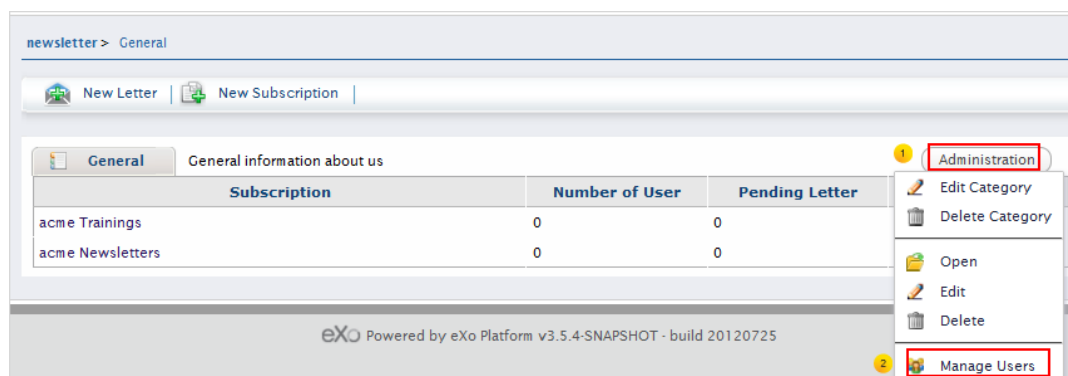
### 5.3.2.1.3. Delete a category

- Select a category that you want to edit.
- Click **Administration**, then select **Delete Category** from the drop-down menu.
- Click **OK** in the confirmation message to delete the category.

### 5.3.2.1.4. Manage users

Administrators can manage users accounts and activities with actions, such as *editing*, *banning*, *removing bans*, or *deleting*.

- Select a category that you want to edit.
- Select **Administration --> Manage Users** from the drop-down menu.



The **Users** form will appear.

Email	Banned	
john.smith@acme.exoplatf	false	
john@exoplatform.com	false	
john@gmail.com	false	
john@gmail.com.fr	false	
rock@yahoo.com	false	

Close

**Details:**

Field	Description
Email	The email address of user who has subscribed this subscription.
Banned	This field has two values: <b>False</b> The user is allowed to get email. <b>True</b> The user is not allowed to get email.
	Ban this user from receiving emails.
	Remove a ban on a user.
	Delete the user.

- Click **Close** to close the form.

### 5.3.2.2. Subscriptions

Administrators can add more subscriptions to any category via two ways as follows:

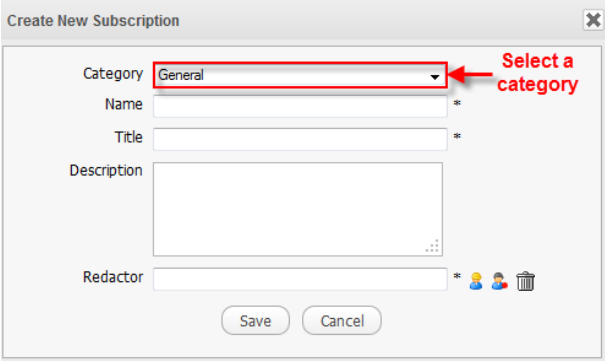
**The first way**

- Click **New Subscription** on the **Action** bar.

newsletter

New Letter **New Subscription** New Category Manage Users

The **Create New Subscription** form will appear.



The 'Create New Subscription' dialog box contains the following fields:

- Category:** A drop-down menu with 'General' selected. A red box highlights the menu, and a red arrow points to it with the text 'Select a category'.
- Name:** A text input field with an asterisk (\*) indicating it is required.
- Title:** A text input field with an asterisk (\*) indicating it is required.
- Description:** A large text area with a vertical ellipsis icon at the bottom right.
- Redactor:** A text input field with an asterisk (\*) and icons for user selection and deletion.

Buttons at the bottom: 'Save' and 'Cancel'.

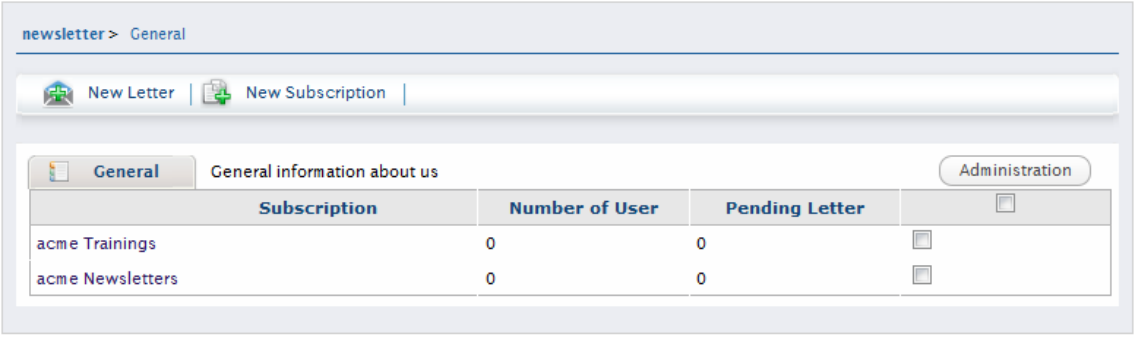
**Details:**

Field	Description
<b>Asterisk (*)</b>	This mark next to each field means that it is required to enter values into that field.
<b>Category</b>	The category which contains this subscription.
<b>Name</b>	The name of the subscription.
<b>Title</b>	The title of the subscription.
<b>Description</b>	The brief description about the subscription.
<b>Redactor</b>	Select users/groups who have rights to manage this subscription.

- Click the **Category** field and select a category from the drop-down menu.
- Enter the rest of their values in the form.
- Click **Save** to create the new subscription.

**The second way**

- Click directly the category to which you want to add a new subscription.

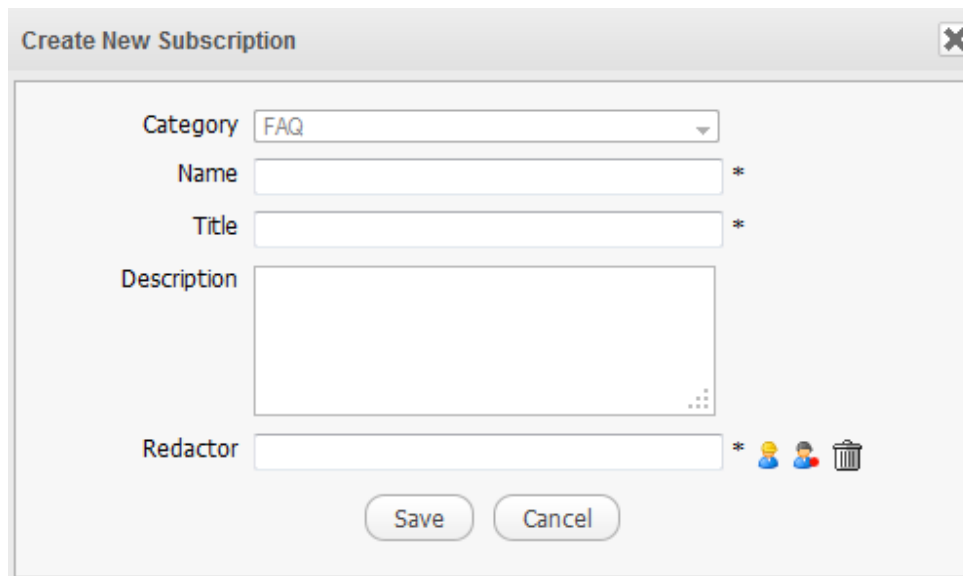


The interface shows the 'newsletter > General' breadcrumb. Below it are tabs for 'New Letter' and 'New Subscription'. The 'General' tab is active, showing 'General information about us'. On the right is an 'Administration' button. Below is a table:

Subscription	Number of User	Pending Letter	
acme Trainings	0	0	<input type="checkbox"/>
acme Newsletters	0	0	<input type="checkbox"/>

- Click **New Subscription** on the **Action** bar.

The **Create New Subscription** form pops up.




**Create New Subscription**

Category:

Name:  \*

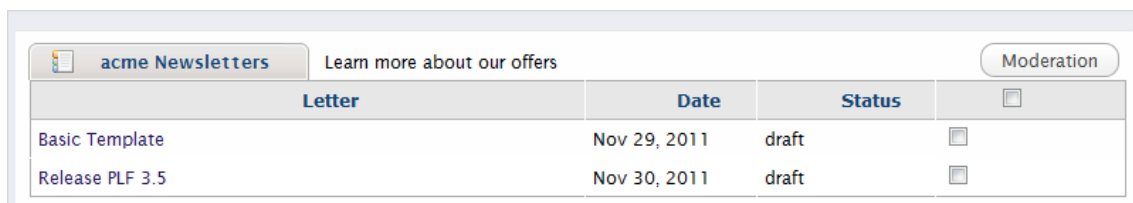
Title:  \*

Description:

Redactor:  \* 

3. Do the same steps (3, 4) as stated in the [first way \[394\]](#).

- Administrators can create newsletters for each subscription.
- These newsletters can be opened, edited, deleted or converted to a template for reuse.



acme Newsletters		Learn more about our offers		Moderation
Letter	Date	Status		
Basic Template	Nov 29, 2011	draft	<input type="checkbox"/>	
Release PLF 3.5	Nov 30, 2011	draft	<input type="checkbox"/>	

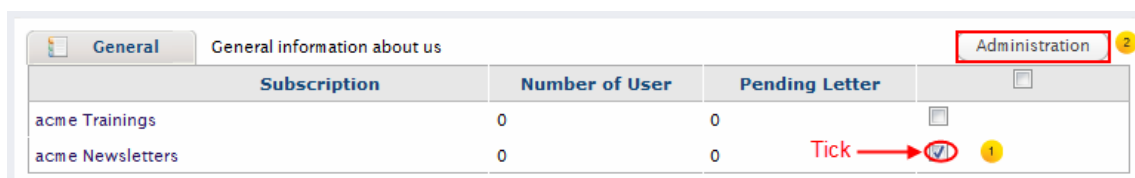
**Details:**

Element	Description
<b>Shoes</b>	The name of the subscription.
<b>Fashion Shoes</b>	The brief description about the subscription.
<b>Letter</b>	The list of all letters of this subscription.
<b>Date</b>	The date and time when creating this newsletter.
<b>Status</b>	There are three types of status: draft, awaiting and sent.
<b>Moderation</b>	This button allows you to take actions on your selected newsletter.

### 5.3.2.3. Open a newsletter

Administrators can easily view the content of a newsletter as follows:

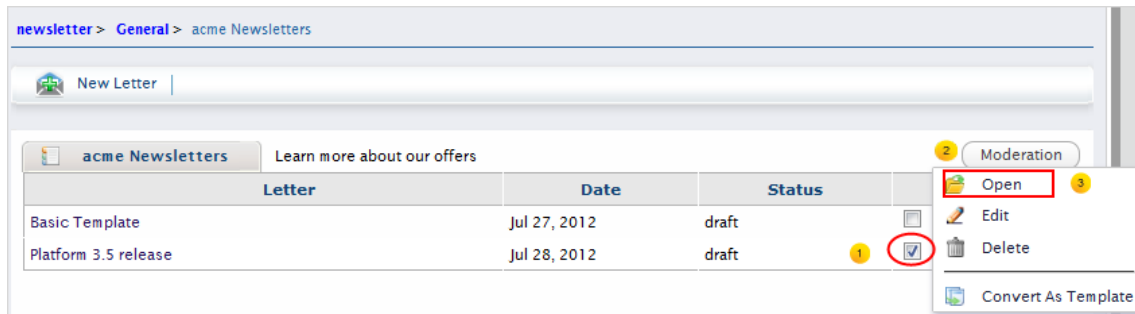
1. Open the **subscription** containing the letter you want to open by clicking it or ticking the corresponding checkbox, then select **Administration** --> **Open**.



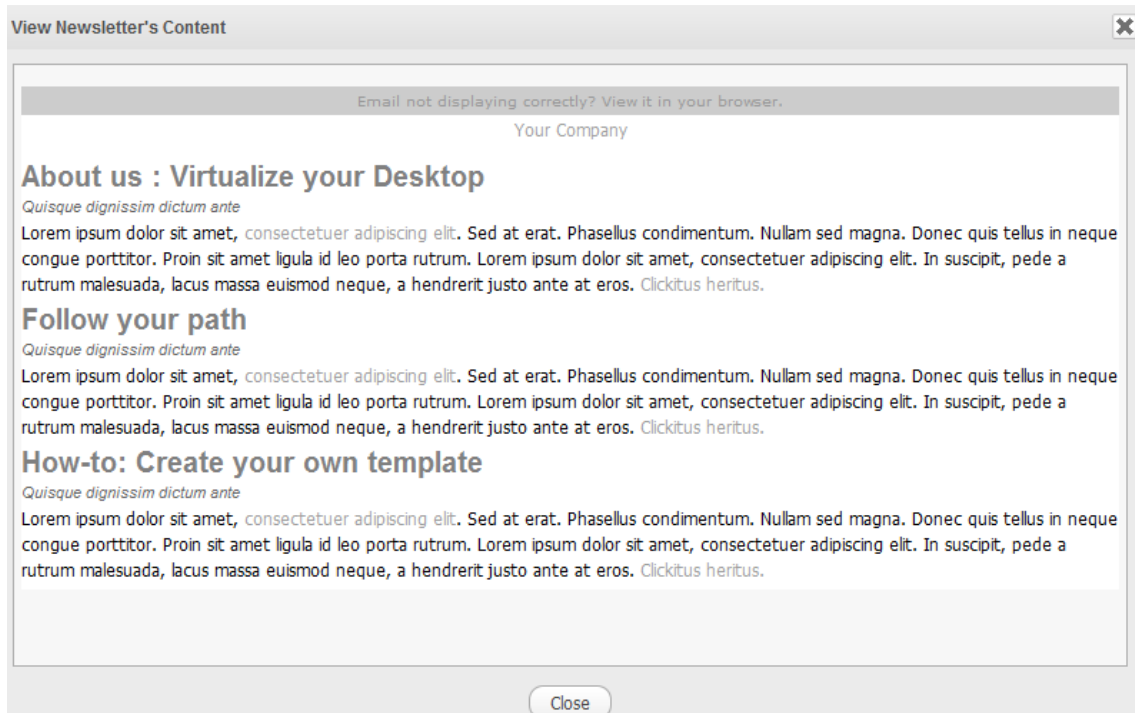
General		General information about us		Administration <sup>2</sup>
Subscription	Number of User	Pending Letter		
acme Trainings	0	0	<input type="checkbox"/>	
acme Newsletters	0	0	Tick → <input checked="" type="checkbox"/> 1	

2. Directly click the newsletter;

Or, select the checkbox corresponding to your desired newsletter, then click **Moderation** --> **Open**.



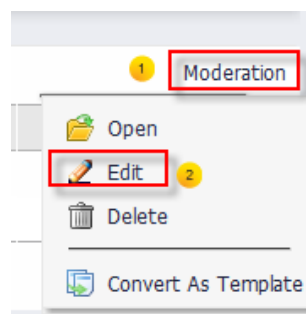
The **View Newsletter's Content** form pops up.



3. Click **Close** to exit.

### 5.3.2.4. Edit a newsletter

1. Select the newsletter you want to edit by ticking the relevant checkbox in a specific subscription.
2. Click **Moderation**, then select **Edit** from the drop-down menu.



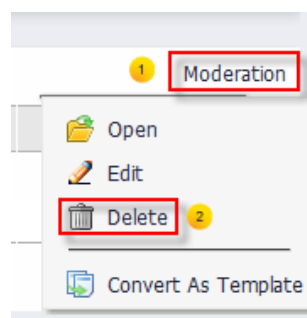
The **Newsletter Entry** pops up.

3. Change the values in the fields that you want to edit: **Template**, **Send Date**, **Category**, **Subscription**.
4. Click the **a Newsletter's info** button.
5. Change values in the **Title** and **Main Content** fields.
6. Click **Save** to save as draft, or click **Send**.

### 5.3.2.5. Delete a newsletter

Administrator can delete obsolete newsletters in a specific subscription.

1. Select the newsletter you want to delete by ticking the corresponding checkbox.
2. Click **Moderation**, then select **Delete** from the drop-down menu.



3. Click **OK** in the confirmation message to accept your deletion.

### 5.3.2.6. Convert as template

The administrator can reuse the template of the frequently used newsletter template.


1. Select the newsletter that you want to create as a template.

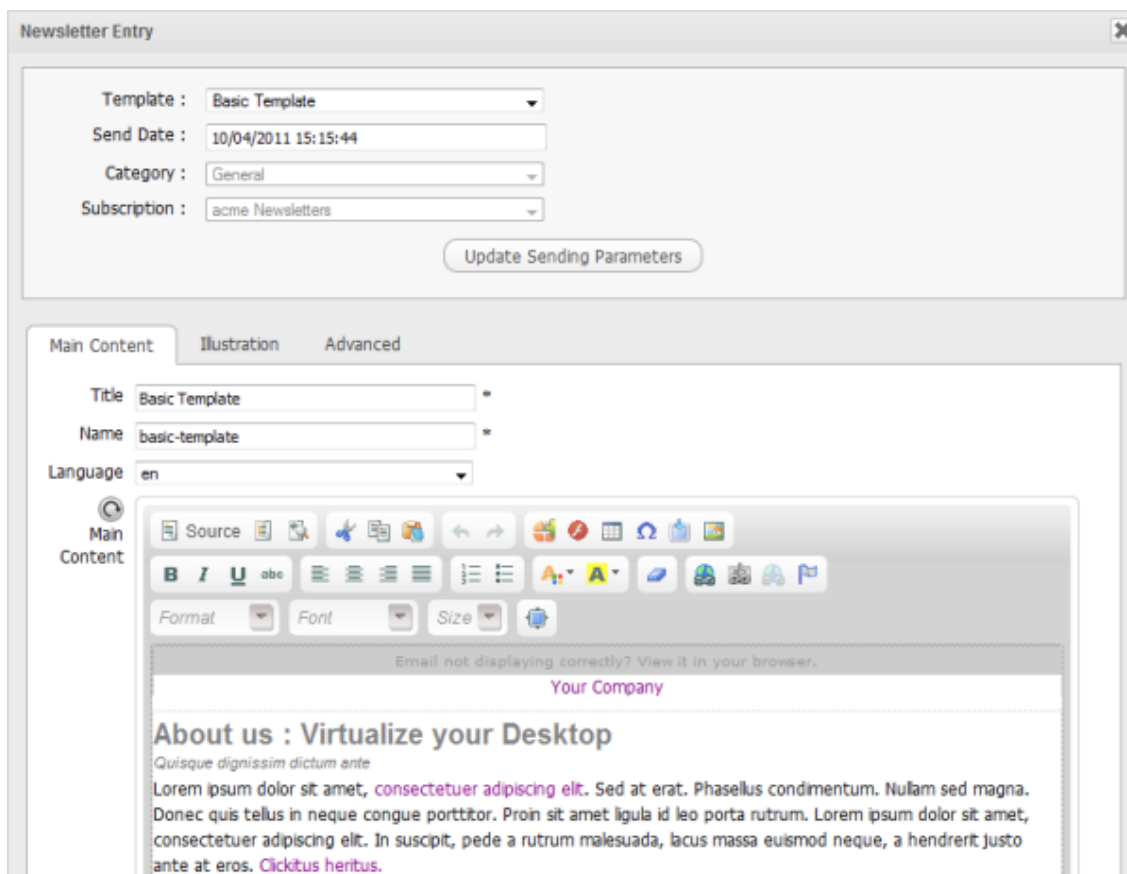


- Click **Moderation**, then select **Convert As Template** from the drop-down menu. For the next time when you create a newsletter, this template will be listed in the **Template** field in the **Newsletter Entry** form.

### 5.3.2.7. Create a newsletter

Each subscription consists of many newsletters. In eXo Platform, you can easily create newsletters by following these steps.

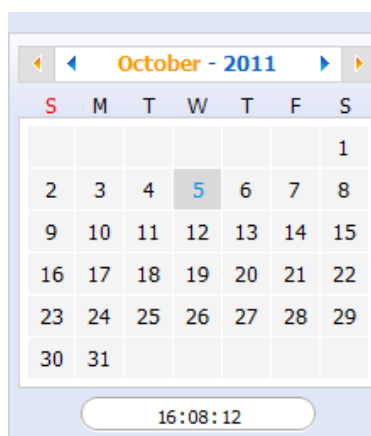
- Select a subscription where you want to create a newsletter.
- Click  **New Letter** on the **Action** bar to open the **Newsletter Entry** form.



**Details:**

Field	Description
<b>Template</b>	The template for your newsletter form. <b>Basic Template</b> is set by default.
<b>Send Date</b>	The date and time to send the newsletter.
<b>Category</b>	The category contains this newsletter.
<b>Subscription</b>	The subscription contains this newsletter.
<b>Update Sending Parameters</b>	This button allows you to update information about this newsletter.

- Click the **Template** field to select the template for the newsletter.
- Click the **Send Date** field. The calendar will appear, allowing you to select the date and time when you want to send the newsletter.



5. Click the **Category** and **Subscription** to select the category and the subscription in the list.
6. Click the **Update Sending Parameters** button to update information about this newsletter. A message pops up and informs you that you have updated information successfully.
7. Input a title of a newsletter into the **Title** field.
8. Create content for a newsletter by inputting information into the **Main Content** textbox.
9. Click **Save** to save this newsletter as draft, or click **Send** to send this newsletter.

## 5.4. Manage workflows

- [Holiday process](#)

Introduction to a sample Holiday process, and steps to request a task related to your holiday and to manage this process.

- [Pay raise process](#)

Introduction to a sample Pay raise process, steps to create and manage this process.

- [Upload a process](#)

Steps to upload a new process that is for administrators.

- [View process detail](#)

Instructions on how to keep track of process details.



### Note

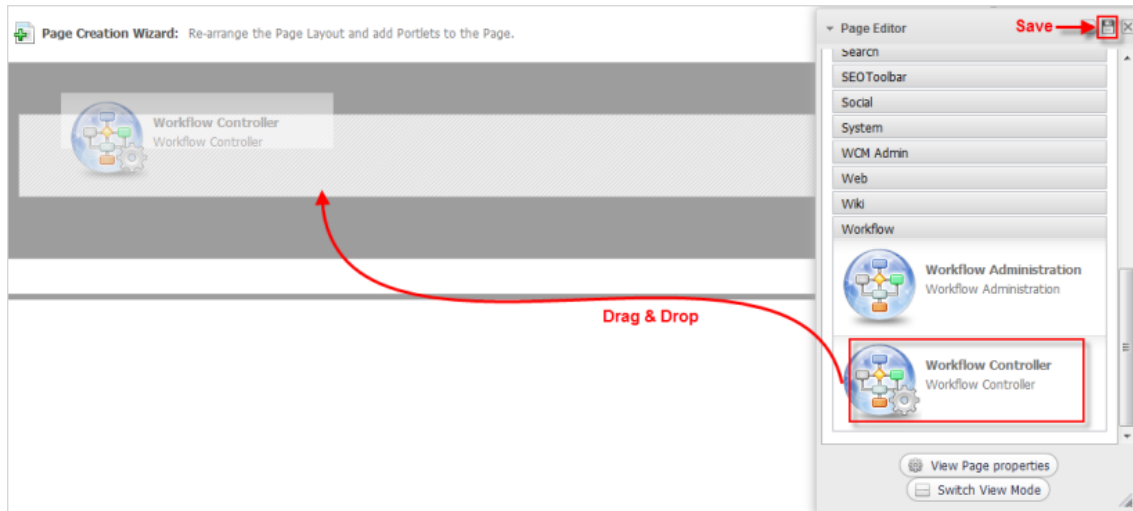
Two portlets, including **Workflow Controller** and **Workflow Administration**, are deprecated in eXo Platform. They remain fully supported for eXo customers, however they will not receive any enhancement and will be removed from the product scope in the future.

**Workflow** is the movement of documents and/or tasks through a work process. More specifically, workflow is the operational aspect of a work procedure: how tasks are structured, who performs them, what their relative order is, how they are synchronized, how information flows to support the tasks and how tasks are being tracked. As the dimension of time is considered in Workflow, Workflow considers "throughput" as a distinct measure. Workflow problems can be modeled and analyzed using graph-based formalisms like Petri nets.

eXo Platform supports two default processes that are used to request tasks from users:

- **Holiday process:** This process is used to request a task related to your holiday. If you want to have a holiday in a time interval, you should use this process.
- **Pay raise process:** This process is used when you want to propose raising your pay.

To perform these processes, you need to add the **Workflow Controller** portlet to a specific page by dragging and dropping it from **Page Editor --> Applications --> Workflow --> Workflow Controller** to the main pane. This can be done when [creating a new page](#) or [editing an existing page](#) or [editing the layout of a portal](#).



#### See also

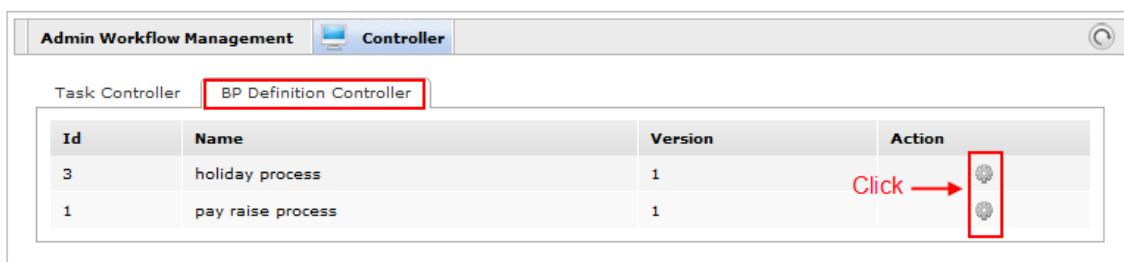
- [Structure content](#)
- [Manage content](#)
- [Manage newsletter](#)

### 5.4.1. Holiday process

This process is used to request a task related to your holiday. If you want to have a holiday in a time interval, you should use this process.

#### Create a holiday process

1. Select the **BP Definition Controller** tab to bring up the process list.



2. Open the **Task Management** form by clicking in accordance with a holiday process that you want to request a task as below.

**Task Management**

Task

**Request some holidays**

Start (dd/mm/yyyy): 07/23/2012

End (dd/mm/yyyy): 07/23/2012

Submit Cancel

[Show Process Diagram](#)

In which:

- **Start (dd/mm/yyyy)** is the start date of your holiday.
- **End (dd/mm/yyyy)** is the end date of your holiday.

In this form, you need to set a time interval in the **Start** and **End** field by moving your cursor to each field, then click each field to open the **Calendar** pop-up.

In which:

- **Start (dd/mm/yyyy)** is the start date of your holiday.
- **End (dd/mm/yyyy)** is the end date of your holiday.

In this form, you need to set a time interval in the **Start** and **End** field by moving your cursor to each field, then click each field to open the **Calendar** pop-up.

3. Submit your task by clicking the **Submit** button. After being submitted, this task will be sent to members of *\*/organization/management/executive-board* group for waiting to be approved/disapproved or refused.

After being submitted, this task will be sent to members of *\*/organization/management/executive-board* group for waiting to be approved/disapproved or refused.

### Manage a holiday process

If you are a member of *\*/organization/management/executive-board* group, you have a responsibility to evaluate received tasks. To take this action, do as follows:

1. Open the **Workflow Controller** portlet. If there are tasks pending to be evaluated, you will see the task list in **Task Controller** tab.

Admin Workflow Management

Controller

Task Controller

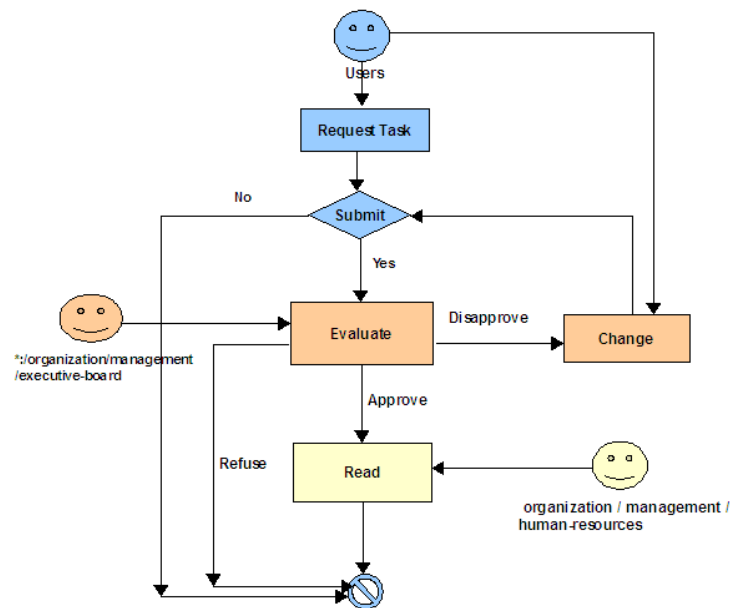
BP Definition Controller

	Actor	Task Id	Process Name	Task Name	Description	Actor Id	Process Date Start	Action
		2	holiday process	evaluation		*/organization/management/executive-board	Mon 23 Jul 2012 12:11:45	<a href="#">Manage</a>
		4	pay raise process	evaluation		*/organization/management/executive-board	Mon 23 Jul 2012 12:13:49	<a href="#">Manage</a>

2. Click the **Manage** function in the **Action** column that corresponds to a task that you want to evaluate. The **Task Management** form will appear.

The 'Task Management' dialog box shows a task titled 'Evaluate holidays'. The initiator is 'john'. The start and end dates are both '07/23/2012'. At the bottom, there are buttons for 'Approve', 'Disapprove', 'Refuse', and 'Cancel'. A link labeled 'Show Process Diagram' is also present.

You can see the following dialog for more details about this process.



3. Do one of the following actions.

- If you agree with the period proposed by the user in the received task:

i. Click the **Approve** button on the **Task Management** form. Automatically, this task will be sent to members of *\*/organization/management/human-resources* to read it.





Thus, if you are a member of *\*/organization/management/human-resources* group, you have responsibility to read the approved tasks as below.

Admin Workflow Management

Controller

Task Controller

BP Definition Controller

	Actor	Task Id	Process Name	Task Name	Description	Actor Id	Process Date Start	Action
		5	holiday process	hr acknowledgement		*/organization/management/human-resources	Mon 23 Jul 2012 12:11:45	Manage
		6	pay raise process	hr update		*/organization/management/human-resources	Mon 23 Jul 2012 12:13:49	Manage

ii. Select the **Manage** function in the **Action** column to open the **Task Management** form.


iii. Click the **Read** button to accept reading the task.

- If you do not agree with the period proposed, click the **Disapprove** button on the **Task Management** form. This task will be sent to the creator of this task to modify it again.
- If the creator agrees to modify the period of time and click the **Modify** button, this task will be sent to members of `*:/organization/management/human-resources` again to manage it.
- If the creator does not agree to modify the period of time and click the **Disagree** button, the task is not existed.
- If you do not agree with this task, click the **Refuse** button on the **Task Management** form. This task will be removed.

### 5.4.2. Pay raise process

This process is used when you want to propose raising your pay.

#### Create a pay raise process

1. Select the **BP Definition Controller** tab to bring up the processes list.
2. Open the **Task Management** form by clicking  that corresponds to a pay raise process which you want to request a task.

Details:

Field	Description
<b>Amount</b>	The amount of money that you want to request.
<b>Priority</b>	The priority level of this task. It may be: not important, important or critical.
<b>Rewarded</b>	The amount of money that you requested including reward or not.
<b>Reason</b>	The reason why you want to request this amount.

3. Enter values for fields in the form.

4. Click the **Submit** button to submit your task.

This task will be sent to members of the `*:/organization/management/executive-board` group that manage it.

### Manage a pay raise process

If you are a member of `*:/organization/management/executive-board` group, you have a responsibility to evaluate received tasks. To do this action, do as follows:

1. Go to the **Workflow Controller** page. If there are tasks which are pending for evaluation, you will see the tasks list in the **Task Controller** tab.

Admin Workflow Management

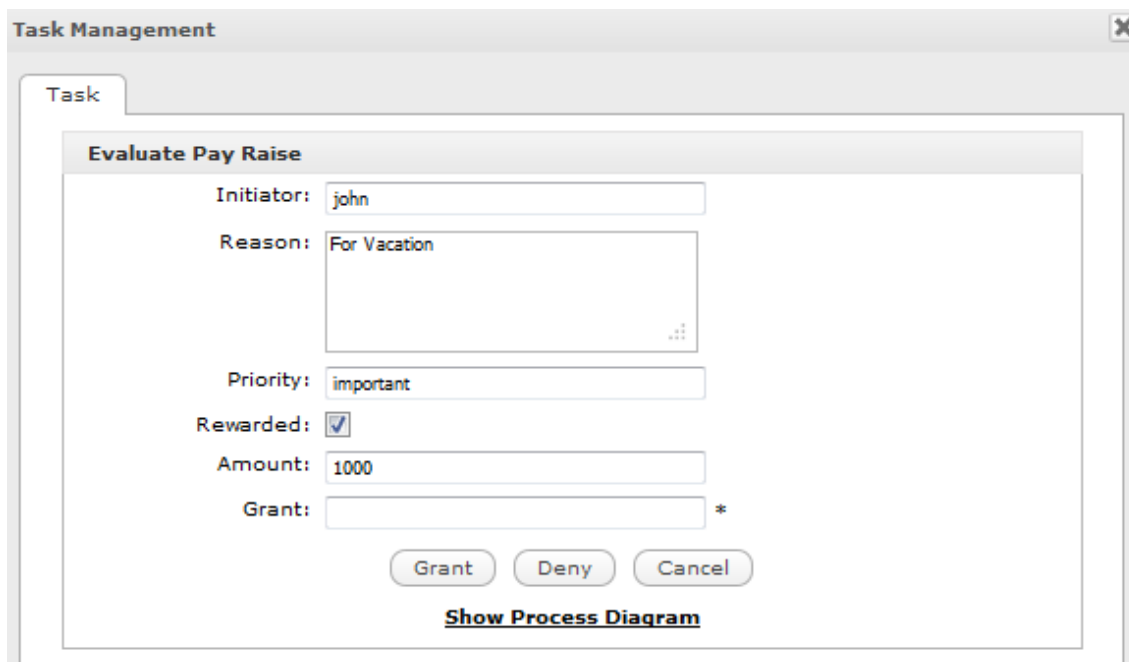
Controller

Task Controller

BP Definition Controller

	Actor	Task Id	Process Name	Task Name	Description	Actor Id	Process Date Start	Action
		4	pay raise process	evaluation		*:/organization/management/executive-board	Mon 23 Jul 2012 12:13:49	<a href="#">Manage</a>

2. Click the **Manage** function in the **Action** column that corresponds to a task which you want to evaluate. The **Task Management** form will appear.



**Task Management**

Task

**Evaluate Pay Raise**

Initiator:

Reason:

Priority:

Rewarded: ☒

Amount:

Grant:  \*

[Show Process Diagram](#)

3. Select one of the followings.

- If you agree with the number that the creator proposes:

i. Input the number that the creator wants in the **Grant** field.

ii. Click the **Grant** button. Automatically, this task will be sent to members of `*:/organization/management/human-resources` to read it.

Thus, if you are a member of the `*:/organization/management/human-resources` group, you have responsibility to read the approved tasks in the **Task Controller** tab by `*:/organization/management/executive-board` as below.

Admin Workflow Management Controller								
Task Controller		BP Definition Controller						
	Actor	Task Id	Process Name	Task Name	Description	Actor Id	Process Date Start	Action
		5	holiday process	hr acknowledgement		*:/organization /management /human-resources	Mon 23 Jul 2012 12:11:45	<a href="#">Manage</a>
		6	pay raise process	hr update		*:/organization /management /human-resources	Mon 23 Jul 2012 12:13:49	<a href="#">Manage</a>

iii. Select the **Manage** function in the **Action** column to open the **Task Management** form.

**Task Management**

Task

**Update Salary**

My custom groovy form

Employee:

Amount to be added:

Click → [Finish it](#) [Cancel](#)

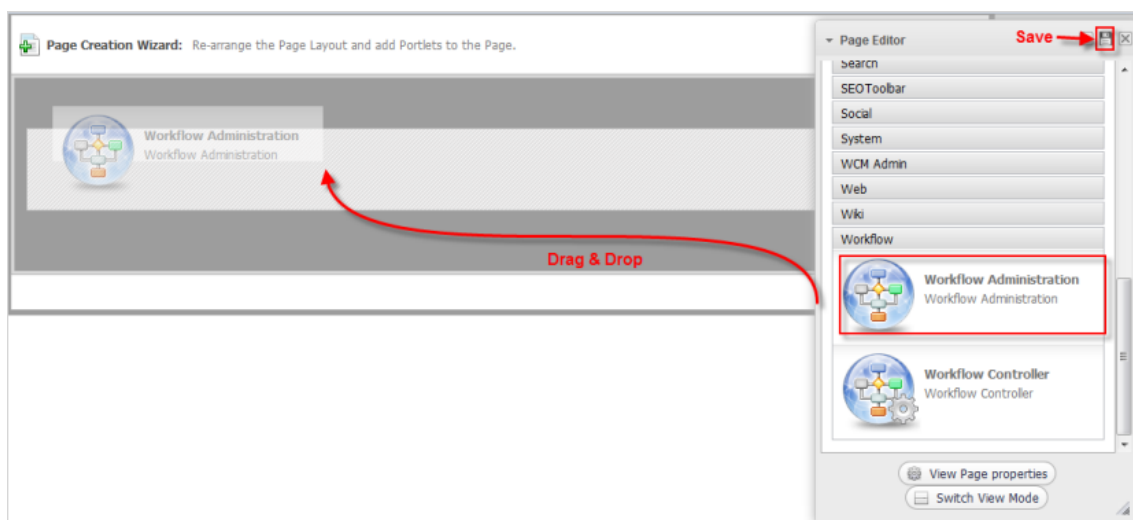
iv. Click **Finish it** to accept reading the task.

If you do not agree with this request, click the **Deny** button. This request will be removed.

### 5.4.3. Upload a process

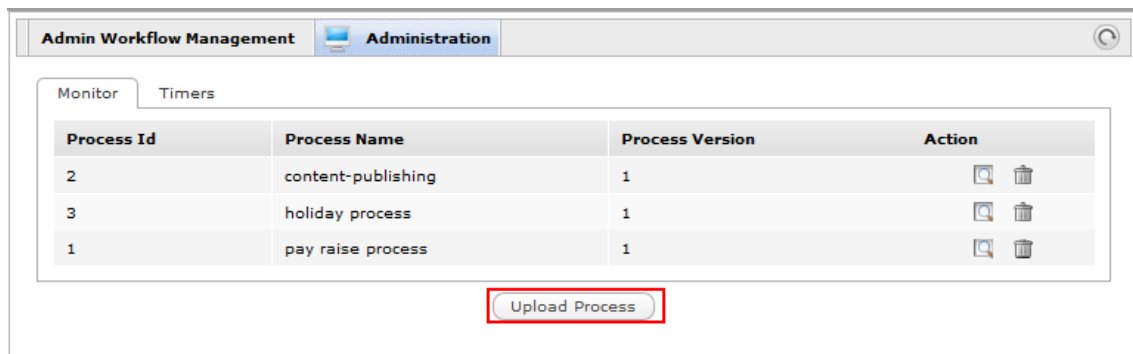
Besides two default process supported by system, administrators also can upload a new process as follows:

1. Add the **Workflow Administration** portlet to a specific page by dragging and dropping it from **Page Editor** --> **Applications** --> **Workflow** --> **Workflow Administration** to the main pane. This can be done when [creating a new page](#) or [editing an existing page](#) or [editing the layout of a page](#).



2. Open the **Workflow Administration** portlet.





3. Click **Upload Process** to open the **Upload Process** form.

The 'Upload Process' form is a modal dialog with the following fields and buttons:

- Name**: A text input field.
- Select File**: A text input field with a **Browse...** button next to it.
- Save** and **Cancel** buttons at the bottom.

4. Enter a name for the uploaded process in the **Name** field.

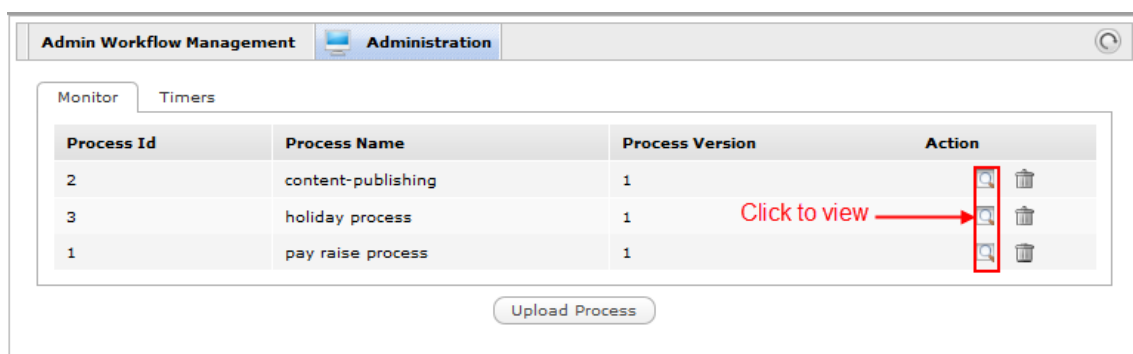
5. Click the **Browse** button to select the location which contains the configuration of a new process, then double-click to upload it.

6. Click **Save** to save the uploaded process.

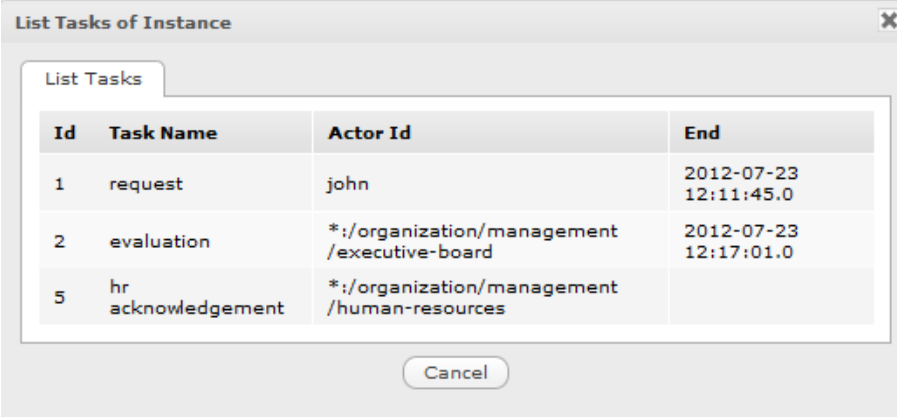
#### 5.4.4. View process detail

This function is used to help administrators keep track of process details as follows:

1. Open the **Workflow Administration** portlet.



2. Click to view requested process list from users as below.




Id	Task Name	Actor Id	End
1	request	john	2012-07-23 12:11:45.0
2	evaluation	*:/organization/management/ executive-board	2012-07-23 12:17:01.0
5	hr acknowledgement	*:/organization/management/ human-resources	

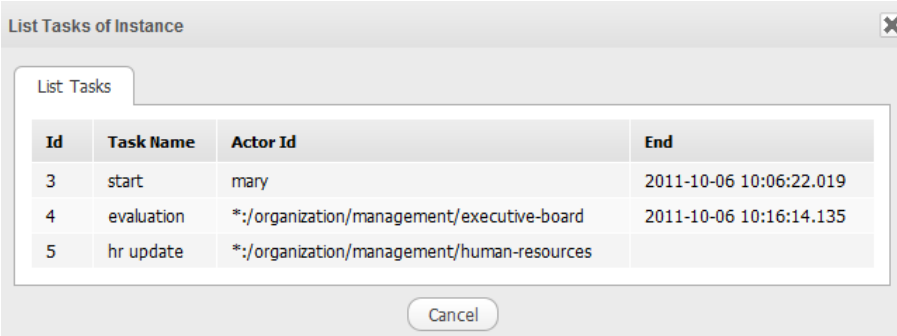


### Note

The completed processes are listed in the **Completed** tab.

To remove all completed processes from the list in the **Completed** tab, click the **Flush All** button, then click **OK** in the confirmation message.

3. Click  corresponding to your desired process to view its details (including all actions from different users on this task). The **List Tasks of Instance** form will appear.



Id	Task Name	Actor Id	End
3	start	mary	2011-10-06 10:06:22.019
4	evaluation	*:/organization/management/ executive-board	2011-10-06 10:16:14.135
5	hr update	*:/organization/management/ human-resources	

To delete a process from the requested process list in the **Process Detail** form, click  corresponding to that process.

# Manage Your Organization

This chapter covers the following topics:

- **Add a user**

How to add a new user to your organization.

- **Manage users**

Actions related to managing users in your organization, including searching for users, editing information of users, or deleting users.

- **Manage groups**

How to add, edit, delete groups and members in groups.

- **Manage memberships**

How to add, edit and delete membership types.

## 6.1. Add a user

1. Click **Add Users** from the drop-down menu.



The **Create New Account** window will open with two tabs: **Account Settings** and **User Profile**.

 A screenshot of the 'Create New Account' window. It has two tabs: 'Account Settings' (active) and 'User Profile'. The 'Account Settings' tab contains several input fields: 'User Name' (with the value 'john'), 'Password', 'Confirm Password', 'First Name', 'Last Name', and 'Email Address'. Each field has a red asterisk indicating it is required. At the bottom of the form, there are two buttons: 'Save' and 'Reset'.

2. Fill all fields in the **Account Settings** tab which must be completed. For more details on these fields, see [here](#). [6]  
Further information about the user, such as nickname, or birthday, can be added in the **User Profile** tab that is not required.
3. Click **Save** to accept your new account. If you want to refresh the input information, simply click **Reset**.

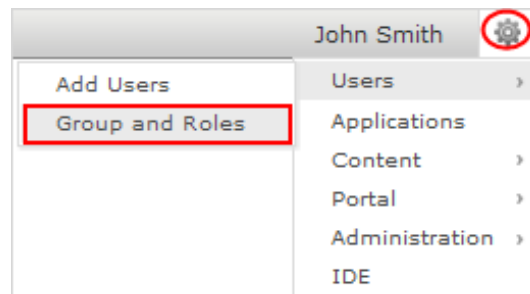
See also

- [Manage users](#)

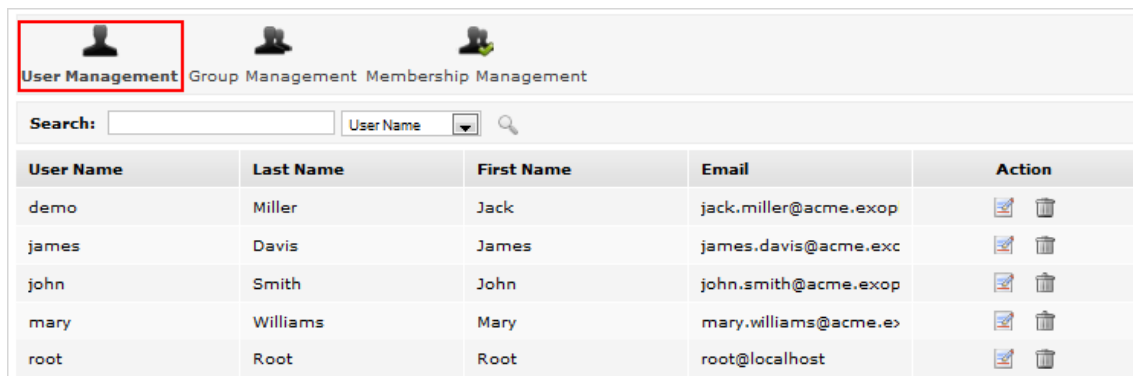
- [Manage groups](#)
- [Manage memberships](#)

## 6.2. Manage users

By clicking **Groups And Roles**, you will see the **Organization** form which allows you to manage users, groups and memberships.



As an administrator, you can easily find, edit information of users, and even remove them from the system via the **User Management** tab. By default, all registered users will be shown in this tab.



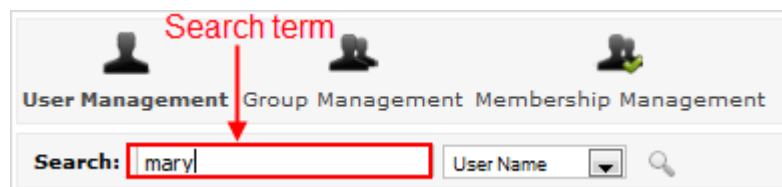
Via the **User Management** tab, you also can define each user belonging to user groups and his memberships (roles) in these groups. You cannot add users to a group but can remove them from the group.

In the following sections, you will learn to [Search for users \[410\]](#), [Edit user information \[410\]](#) and [Delete a user \[411\]](#).

### Search for users

You can search for specific users by username, first name, last name or email address.

1. Type the search term related to the user you want to search. You do not need to enter an exact term.



2. Select the information type you want to search against.
3. Click , or hit the **Enter** key to perform your search.

### Edit user information

1. Locate the user you want to edit his information.
2. Click corresponding to the user with the information you want to edit.

3. Select the **Account Info** tab to edit main information of the user, including **First Name**, **Last Name**, or **Email Address**.

The screenshot shows the 'User Management' interface with three tabs: 'User Management', 'Group Management', and 'Membership Management'. The 'Account Info' tab is selected and highlighted with a red box. Below the tabs, there are four input fields: 'User Name' with the value 'mary', 'First Name' with 'Mary', 'Last Name' with 'Williams', and 'Email Address' with 'mary.williams@acme.exoplatform.com'. Each of the last three fields has an asterisk (\*) indicating they are required. Below these fields is a 'Change Password' checkbox, which is currently unchecked. At the bottom of the form are 'Save' and 'Cancel' buttons.

#### Username

The **Username** cannot be changed.


#### Change Password

The **Change Password** option allows an administrator to set a new password for the selected user. When the **Change Password** option is unchecked, **New Password** and **Confirm Password** are hidden. Passwords must contain at least 6 characters, including letters, numbers and punctuation marks.

For more details on these fields, see [here](#). [6]


4. Select the **User Profile** tab to edit the personal information of the selected user, including **Profile**, **Home** and **Business**. You may also switch the default display language for that user by selecting another language from the **Language** field where all available languages are displayed in the alphabetical order.
5. Select the **User Membership** tab to see the group membership information of the user.

The **User Membership** tab displays which groups the selected user belongs to.

To remove the user from a group, click .

6. Click **Save** to accept your changes.

#### Delete a user

1. Locate the user you wish to delete.
2. Click  corresponding to the user you want to delete in the main **User Management** form.
3. Click **OK** in the confirmation message to accept your deletion.

#### See also

- [Add a user](#)
- [Manage groups](#)
- [Manage memberships](#)

## 6.3. Manage groups

- [Add a new group](#)

Steps to add a new group to your organization.

- [Edit a group](#)  
Steps to edit information of current groups.
- [Delete a group](#)  
Steps to remove a group from your organization.
- [Add a user to a group](#)  
Steps to add members to a group.
- [Edit a user membership in a group](#)  
Steps to change the user's membership type in a group.

Select the **Group Management** tab in the **Organization** form. This tab is used to add, edit or delete a group. You can also add or delete a user to/from a group and edit the user membership in the group.

User Name	First Name	Last Name	Membership Type	Email	Action
john	John	Smith	member	john.smith@a	
demo	Jack	Miller	member	jack.miller@a	

**Add Member**

Username  \*

Membership

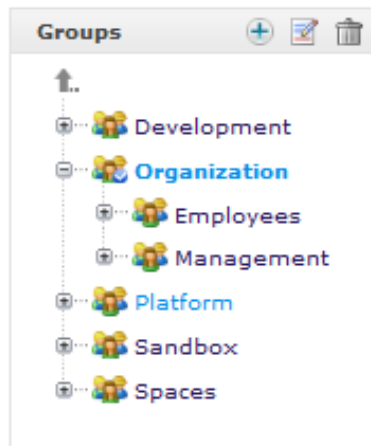
By default, all existing groups will be displayed on the left pane. The right pane shows information of the selected group and of its members with the **Add Member** form.

#### See also

- [Add a user](#)
- [Manage users](#)
- [Manage memberships](#)

### 6.3.1. Add a new group

1. Select the path to create a new group by clicking the group from the left pane or by clicking if you want to create a group at a higher level. The selected path is displayed in the breadcrumb bar.



- Click  in the left pane.

The **Add Group** form will be displayed in the right pane.

#### Details:

Field	Description
<b>Group Name</b>	Name of the group that is required and unique within the portal with its length from 3 to 30 characters. Only letters, numbers and underscore characters are allowed for the <b>Group Name</b> field.
<b>Label</b>	The display name of the group with any length from 3 to 50 characters.
<b>Description</b>	A description of the group with any length from 0 to 255 characters.


- Fill in the required fields. Once being saved, the **Group Name** cannot be edited.
- Click **Save** to accept creating the new group.

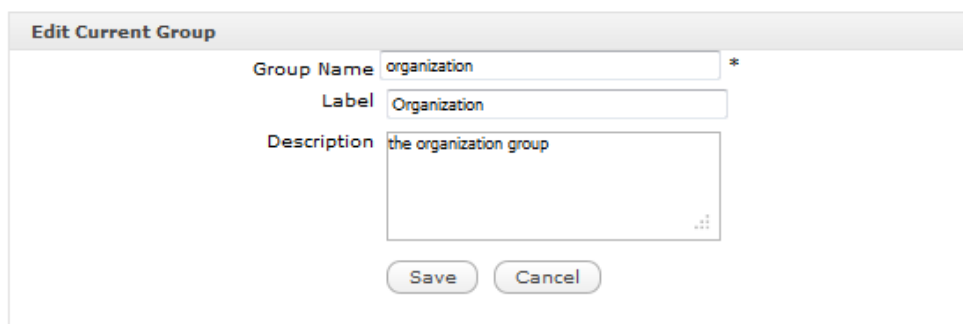


#### Note

The creator will automatically become the manager of that group. The creator's username will be added to the created group with the "manager" membership.

### 6.3.2. Edit a group


- Click the group you want to edit in the left pane.
- Click  in the left pane to show the **Edit Current Group** form of the selected group.

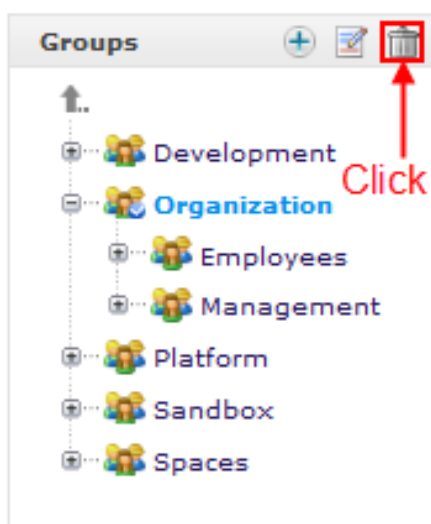


The 'Edit Current Group' dialog box contains three input fields: 'Group Name' with the value 'organization' and an asterisk indicating it is required; 'Label' with the value 'Organization'; and 'Description' with the value 'the organization group'. At the bottom are 'Save' and 'Cancel' buttons.

3. Make changes on the fields, except **Group Name**.
4. Click **Save** to accept your changes.

### 6.3.3. Delete a group

1. Click the group you want to delete in the left pane.
2. Click  in the row of the membership type you want to delete.



3. Click **OK** in the confirmation message to accept your deletion.



#### Note

After being deleted, all information related to that group, such as users and navigation, is also deleted. You cannot delete the mandatory groups, including *Platform*, *Platform/Administration*, *Platform/Guests*, *Platform/Users*.

### 6.3.4. Add a user to a group

1. Select the group to which you want to add a new user in the left pane.
2. Enter the exact Username of the user that you want to add to the selected group (you can add many usernames separated by commas);



Organization > Employees ← The current group

Groups: Employees, Management

Add member →

User Name	First Name	Last Name	Membership Type	Email	Action
mary	Mary	Williams	member	mary.william:	
john	John	Smith	manager	john.smith@	
demo	Jack	Miller	member	jack.miller@:	
james	James	Davis	member	james.davis(	
root	Root	Root	*	root@localho	

Add Member

Username  \*

Membership

Save

Or, enter at least one character if you are not sure about the exact spelling and do the further followings:

- i. Click to search by your entered characters.

After you have clicked , there will be a list of all existing users whose **Usernames** include the entered characters. For example, if you enter 'o', you will get the following result.

Select User

Search:  Username ← Search users

<input type="checkbox"/>	Username	First Name	Last Name	Email
<input type="checkbox"/>	demo	Jack	Miller	jack.miller@acm
<input type="checkbox"/>	james	James	Davis	james.davis@ac
<input type="checkbox"/>	john	John	Smith	john.smith@acm
<input type="checkbox"/>	mary	Mary	Williams	mary.williams@a
<input type="checkbox"/>	root	Root	Root	root@localhost

Add Close

- ii. Select the checkboxes corresponding to users you want to add to the group.

After clicking **Add**, you will see the complete **Usernames** in the **Add Member** form.

Add Member

Username  \*

Membership


Save ← Click to save

3. Select the membership for the users from the **Membership** list. You can click to update the memberships list in case of any changes.
4. Click **Save** to accept adding the selected users to the specific group with the specified 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. The user's membership information is hereafter updated. You can check it by opening the **User Management** form and editing the user you just added.

### 6.3.5. Edit a user membership in a group

1. Click  corresponding to a specific user with a membership in the **Action** column in the right pane.

2. Change the membership of the selected user by selecting another value in the **Membership** list.
3. Click **Save** to complete your changes.

## 6.4. Manage memberships

The role of a user in a specific group is managed by using the **Membership Management** tab.


By default, eight membership types available in eXo Platform include *Member*, *Author*, *Editor*, *Manager*, *Redactor*, *Validator*, *Webdesigner*, and *Publisher*. The "Manager" has the highest right in a group.

In the following sections you will learn to [Add a new membership type \[416\]](#), [Edit a membership type \[417\]](#) and [Delete a membership type \[417\]](#).


#### Add a new membership type

1. Enter values into the fields of the **Add/Edit Membership** form. The **Membership Name** field is required, and only letters, digits, dots, dashes and underscores are allowed without ANY SPACES.
2. Click **Save** to accept adding a new membership, or **Reset** to clear entered values.

#### Edit a membership type

1. Click  corresponding to the membership type you want to edit in the **Action** column. Information about the selected membership type will be updated automatically in the **Add/Edit Membership** form.
2. Make your desired changes on the **Description** field. You cannot change the **Membership Name**.
3. Click **Save** to accept your changes.

#### Delete a membership type

1. Click  in the **Action** column.
2. Click **OK** in the confirmation message to accept your deletion.

#### See also

- [Add a user](#)
- [Manage users](#)
- [Manage groups](#)



# Manage Your Portals

This chapter covers the following topics:

- **Manage permissions**

Detailed instructions on how to set permissions on a portal, page, category and portlet.

- **Manage sites**

Steps to create/edit/delete a portal, and to switch between various portals.

- **Manage a sample accessible website**

Introduction to a sample accessible website and its features, as well instructions on how to create/access an accessible site.

- **Manage navigation nodes**

Actions which can be done on a navigation, such as adding/editing/copying/pasting/cloning/cutting/deleting a node, or changing the node orders.

- **Manage pages**

Step-by-step instructions on how to create a new page by using **Page Creation Wizard** or **Page Manager**, and to edit/delete a page and to manage types of page navigations.

- **Manage applications**

Actions which can be done on applications inside a portal and a Desktop.

## 7.1. Manage permissions

- **Set permissions on a portal**

Instructions on how to set the Access and Edit permissions on a portal for groups and memberships.

- **Set permissions on a page**

Steps to set the Access and Edit permissions on a page for groups and memberships.

- **Set Access permission on a category**

Steps to set the Access permission on a category.

- **Set Access permission on a portlet**

Steps to set the Access permission on a portlet.

Permissions play an important role in accessing and performing actions in eXo Platform. Depending on these permissions assigned by an administrator, users can gain access to various components and another actions, such as editing portals, pages, or portlets.

Details about permission types and levels can also be found in the [Permission \[3\]](#) section.

See also

- [Manage sites](#)
- [Manage a sample accessible website](#)
- [Manage navigation nodes](#)

- [Manage pages](#)
- [Manage applications](#)

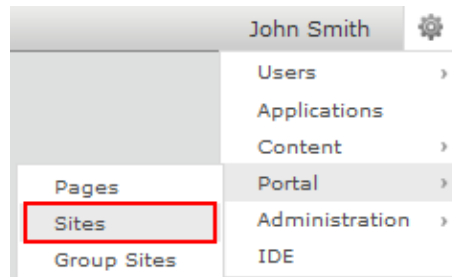
### 7.1.1. Set permissions on a portal

You can set the portal permissions (**Access permission** and **Edit permission**) for a specific user via the **Permission Settings** tab.

The **Permission Settings** tab can be opened in some various ways, depending on the following approaches.

**For new portals:**

1. Hover your cursor over  in the **Administration** bar, then click **Portal --> Sites**.

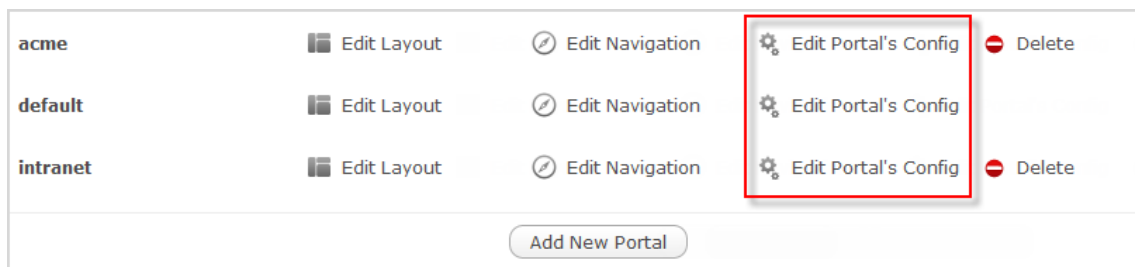


2. Select the **Add New Portal** button to open the **Create New Portal** form.
3. Click the **Permission Settings** tab.

**For existing portals:**

**The first way**

1. Hover your cursor over  in the **Administration** bar, then click **Portal --> Sites**.



2. Select **Edit Portal's Config --> Permission Settings** tab.

**The second way**

1. Hover your cursor over **My Sites** on the **Administration** bar, then select your desired portal from the drop-down menu.
2. Select **Edit --> Site --> Layout** on the **Administration** bar.
3. Click **Site's Config** in the **Edit Inline Composer** window, then select the **Permission Settings** tab.

#### Access permission



#### Note

To access a portal, you must belong to one of the groups that have the *Access* permission to that portal.

After entering into the [Permission Settings \[420\]](#) tab, you first need to select the **Access Permission Settings** sub-tab to set the access permissions on a portal.

- If you want to assign the Access permission to users in the public mode (without signing in), simply select the **Make it public (everyone can assess)** checkbox.
- If you do not want everyone to access the portal, first deselect the **Make it public (everyone can access)** checkbox, and do the followings:
  1. Click the **Add Permission** button to open the **Select Permission** form.

2. Select one group in the left pane, and one membership type in the right pane. In the list of membership types, the asterisk (\*) means that any membership types of the selected group are allowed.
  3. Click **Save** to finish your settings.
- After you have selected a membership type, the selected permission is displayed in the Access permission list.
  - You can select only one group with one membership type at each time. If you want to add more, click the **Add Permission** button and select again.

### Edit permission



#### Note

Only members under the **Editor** group can edit that portal. Access rights can be given to several groups but edit rights can only be given to a group with a membership type. To assign the *Edit* permission to a user, you must add him/her to the editors group of the relevant portal.

After entering into the [Permission Settings \[420\]](#) tab, you first need to select the **Edit Permission Settings** sub-tab to set the Edit permissions on a portal and do the followings:

1. Click the **Select Permission** button to open the **Permission Selector** form.
2. Select one group in the left pane and one membership type in the right pane. You can select \* if you want to assign all available membership types to the selected group.
3. Click **Save** to finish your settings.



## 7.1.2. Set permissions on a page

To set permissions on a page, you first need to go to the [Permission Settings \[440\]](#) tab via different ways:

### Via Edit Page:

1. Hover your cursor over **My Sites** on the **Administration** bar, then select the page you want to configure from the drop-down menu.  
You will be directed to your selected site.
2. Continue hovering your cursor over **Edit** on the **Administration** bar, then select **Page --> Layout** from the drop-down menu.
3. Click **View Page Properties** in the **Page Editor** window.
4. Select the **Permission Settings** tab.

### Via Page Management:

1. Hover your cursor over  on the **Administration** bar, and select **Portal --> Pages** to open the **Pages Management** page.
2. Locate the page you want to edit using the **Page Id** column, then click  corresponding the page in the **Action** column. You will be taken to the **Page Editor** window.
3. Select the **Permission Settings** tab.

### Access permission



#### Note

To be able to access a page, you have to be in one of the groups that have the *Access* permission to that page.

To assign the *Access* permission on a page, simply follow steps as stated in the [Access permission \[420\]](#) section.

### Edit permission




#### Note

Only users under the page's editors group can edit it. The *Access* permission can be set for several groups but the *Edit* permission only can be set for one group.

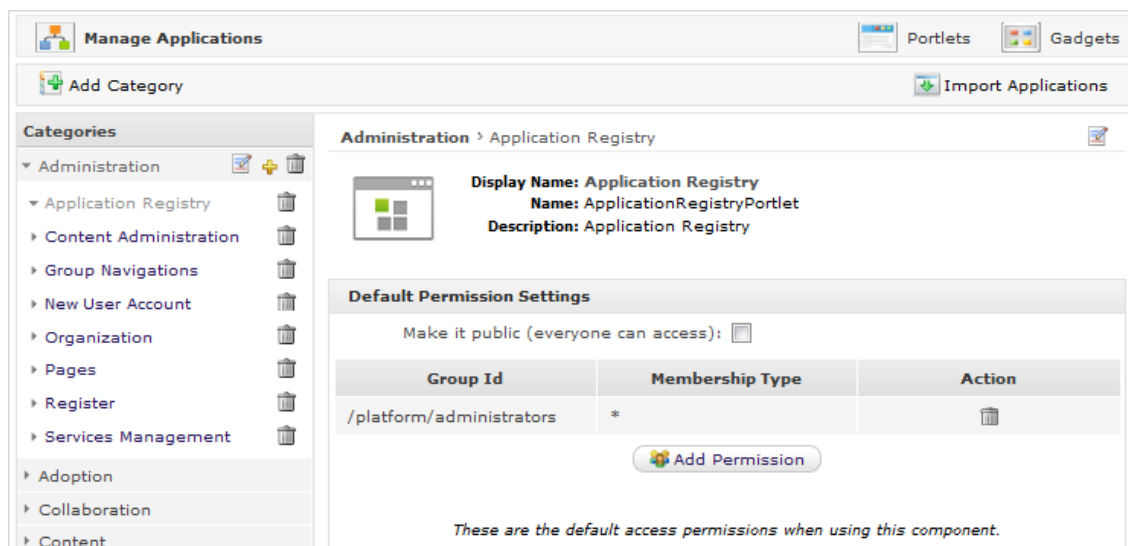
To give users the *Edit* permission, you must add them to the editors group of that page via **Permission Settings** and follow steps as stated in the [Edit permission \[421\]](#) section.


## 7.1.3. Set Access permission on a category

Setting the *Access* permission on categories allows these categories to be listed when a page is edited to add portlets or widgets.

1. Hover your cursor over  in the **Administration** bar, then select **Applications** from the drop-down menu to open the **Manage Applications** page.



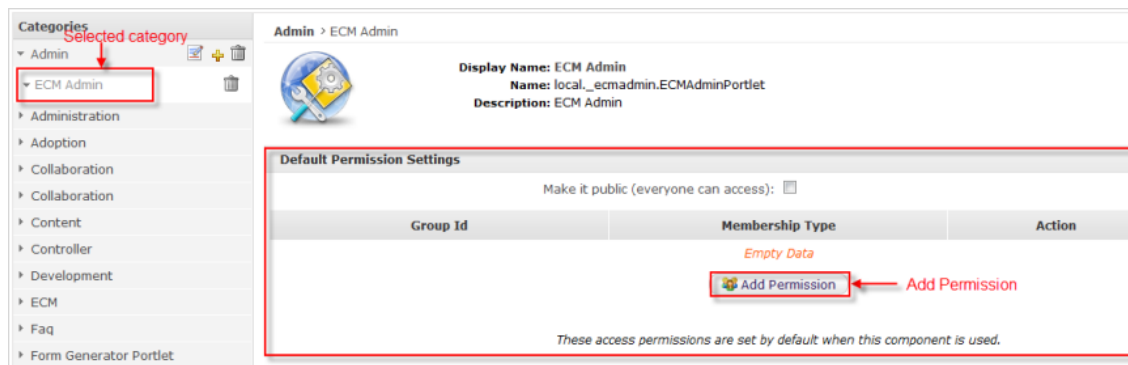


2. Select one category from the list of available categories in the left pane, then click .
3. Select the **Permission Settings** tab.
4. Set the Access permission on a category that is similar to the [Access permission \[420\]](#) section.

### 7.1.4. Set Access permission on a portlet

1. Go to the **Manage Applications** page.
2. Select the category containing the portlet you want to set the Access permission, then click the relevant portlet under your selected category.

The selected portlet will be highlighted in grey in the left pane with its detailed information in the right pane.



3. Follow steps stated in the [Access permission \[420\]](#) section to assign access permission on your selected portlet in the **Default Permission Settings** form.

## 7.2. Manage sites

- [Create a new portal](#)

Steps to create a new portal and configure its settings.

- [Switch between portals](#)

Steps to navigate between portals.

- [Edit a portal](#)

Ways and steps to edit the layout, navigation and configuration of a portal.

- [Delete a portal](#)

Steps to remove a portal.

#### See also

- [Manage permissions](#)
- [Manage a sample accessible website](#)
- [Manage navigation nodes](#)
- [Manage pages](#)
- [Manage applications](#)

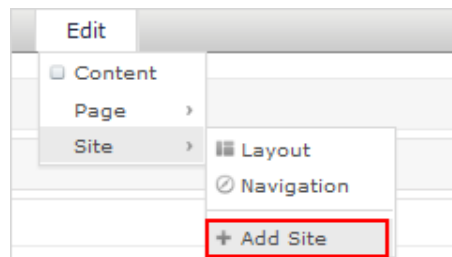
### 7.2.1. Create a new portal

You can perform this action only when you are a member of the `/platform/administrators` group.


1. Open the **Create New Portal** window by following one of the two ways:

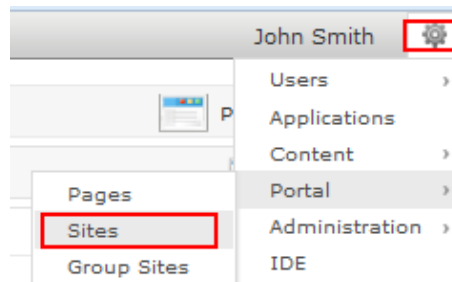
#### The first way

Hover your cursor over **Edit --> Site** on the **Administration** bar, then select **Add site** from the drop-down menu.



#### The second way

- i. Hover your cursor over  on the **Administration** bar, then select **Portal --> Sites** from the drop-down menu.



- ii. Click the **Add New Portal** button.

By default, the **Create New Portal** window, which contains the **Portal Settings** tab, will open.

Portal Settings   Properties   Permission Settings

Portal Name:  \*

Label:

Description:

Locale:  \*

Skin:

Save Cancel

2. Enter a string into the **Portal Name** field. This field is required and must be unique. Only alphabetical, numerical and underscore characters are allowed for this field with the length from 3 to 30 characters.
3. Select the default display language for the portal from the **Locale** field.
4. Click the **Properties** tab to set the properties of a portal.

Portal Settings   Properties   Permission Settings

Keep session alive:

Show info bar by default ☐

Save Cancel

#### Details:

Field	Description
<b>Keep session alive</b>	<p>Keep the working session for a long time to avoid the time-out. There are 3 options:</p> <p><b>Never:</b> The session will time out if the logged-in user does not do any action after a given period. In this case, there will be a message which asks the user to log in again.</p> <p><b>On Demand:</b> The session will time out to the application's requirement. If there is no request from the application, the session will time out after the given period that is similar to that of <b>Never</b>.</p> <p><b>Always:</b> The session will never time out even if the logged-in user does not do any action after a long time.</p>
<b>Show info bar by default</b>	<p>Tick the checkbox to show the info bar of the portlet by default when the portlet is used in a page of the portal.</p> <p>The "Show info bar by default" option only takes effect on new portlets as from the time you select the checkbox rather than all portlets of the portal. In particular,</p>

Field	Description
	after creating your new portal with the "Show info bar by default" option checked, newly created portlets of the portal will be displayed with the info bar by default. However, if you deselect the "Show info bar by default" option when editing the portal's configuration, the former portlets with the shown info bars are remained; meanwhile new portlets, which are created after this option is deselected, will be shown without the info bars.

- Click the **Permission Settings** tab to set permissions on the portal.

The list of Access permissions for the portal is empty by default. You have to select at least one or tick the **Make it public (everyone can access)** checkbox to assign the Access permission to everyone.



#### Note

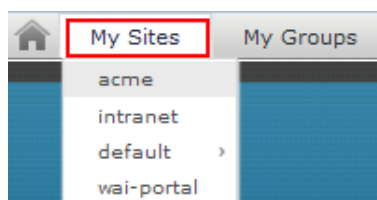
For more details on how to grant permissions on the portal, see the [Set permissions on a portal](#) section.

- Click the **Portal Templates** tab to select the template for your portal.
- Click **Save** to accept creating your new portal.

## 7.2.2. Switch between portals

This function enables you to select and use another portals (gateway, starting site). You can perform this action only when you are assigned the appropriate permission by the administrators.

To switch between portals, hover your cursor over **My Sites** on the **Administration** bar for a list of all portals in which you have at least access rights, then click the desired portal. You need to wait a few seconds to be switched to your selected portal.



## 7.2.3. Edit a portal



#### Note

The function allows you to edit layouts, navigations and properties of a portal. To do this, you must have the *Edit* permission by contacting your administrator.

**When you have the Edit permission, follow either of two ways below to go to the relevant form that allows you to do actions related to editing a portal.**

#### The first way

- Hover your cursor over **My Sites** on the **Administration** bar and select the portal you want to edit from the drop-down menu.

You will be switched to your selected portal just after a few seconds.

- Hover your cursor over **Edit** on the **Administration** bar to open the drop-down menu.


### i. Select **Site** --> **Layout**.













You will be directed to the **Edit Portal** page. From here, you can make changes on the [layout of your selected portal](#), or on [its configurations](#) by selecting **Site's Config** at the bottom of the **Edit Inline Composer** form.

### ii. Select **Site** --> **Navigation**.

From here, you can [edit your selected portal's navigation](#).

## The second way

1. Hover your cursor over  to open the drop-down menu.
2. Select **Portal** --> **Sites** to show the list of active portals.



acme	 Edit Layout	 Edit Navigation	 Edit Portal's Config	 Delete
default	 Edit Layout	 Edit Navigation	 Edit Portal's Config	
intranet	 Edit Layout	 Edit Navigation	 Edit Portal's Config	 Delete
				

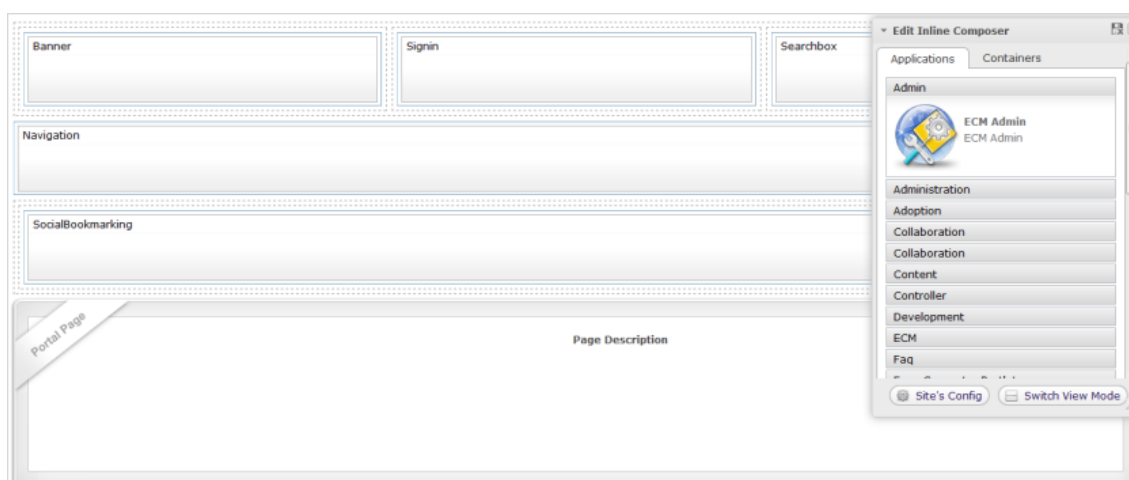
3. Specify your desired portal, and do the following actions:
  - [Edit the portal's layout](#) by clicking **Edit Layout**.
  - [Change the portal's navigation](#) by clicking **Edit Navigation**.
  - [Edit the portal's configurations](#) by clicking **Edit Portal's Config**.
  - [Delete the portal](#) by clicking **Delete**.

### 7.2.3.1. Edit layout

To edit your selected portal's layout, your first need to follow [one of ways above \[426\]](#) to open the **Edit Layout** form.

New applications, containers or gadgets can be dragged and dropped from the **Edit Inline Composer** window to the main portal body.

You can rearrange elements in the portal body by dragging and dropping them into your desired positions. Also, you can edit or remove any element by hovering your cursor over it and selecting , or  respectively.

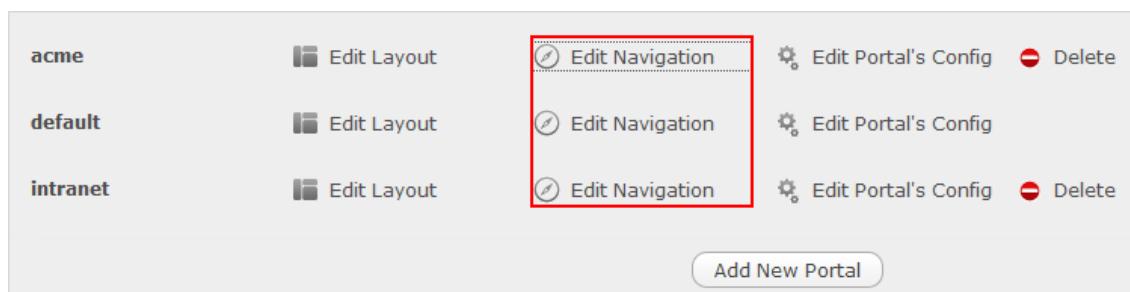


**Note**

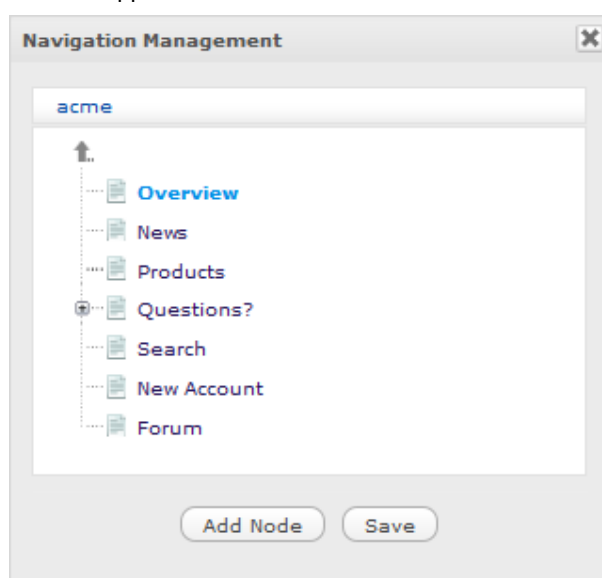
For more details on how to edit elements, see the [Edit a specific portlet](#) section.

### 7.2.3.2. Edit navigation

To edit your selected's navigation, your first need to follow [one of ways above \[426\]](#) to open the **Edit Navigation** form.



The **Navigation Management** form appears.

**Note**

For more information about actions, which can be done in the [Navigation Management \[428\]](#) form, see the [Manage navigation nodes](#) section.

### 7.2.3.3. Edit configurations

Configurations of a portal include settings, properties and permissions that can be set by following [one of ways above \[426\]](#) to open the **Edit Configurations** window.

The screenshot shows a 'Portal Settings' dialog box with three tabs: 'Portal Settings', 'Properties', and 'Permission Settings'. The 'Properties' tab is selected. It contains the following fields: 'Portal Name' with the value 'acme' and an asterisk indicating it is required; 'Label'; 'Description'; 'Locale' with a dropdown menu showing 'English' and an asterisk; and 'Skin' with a dropdown menu showing 'Default'. At the bottom of the dialog are 'Save' and 'Cancel' buttons.

In this window, you can make changes on fields in the various tabs, except the **Portal Name** in the **Portal Settings** tab.



#### Note

For more details on these fields, refer to the [Create a new portal](#) section.

### 7.2.4. Delete a portal



#### Note

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

1. Open the list of existing portals by following steps as stated in the [second way](#). [427]
2. Click **Delete** corresponding to the portal you want to delete.
3. Click **OK** in the confirmation message to accept your deletion.

## 7.3. Manage a sample accessible website

The accessibility subject is quite vast, but we have some guidelines like WCAG 2.0 (Web Content Accessibility Guidelines) and also the RGAA for the French Administration. eXo Platform has been improved to be compliant with these rules. eXo Platform has priority in providing users with a way to create an accessible site and accessible contents regardless of their roles, by using the "Sample Accessible Website" template. This site is accessible without JavaScript enabled on the browser.

To check the compliance of this template, the following tools are used:

- [W3C validator](#) XHTML 1.0 Transitional
- [Achecker](#) with the rules of WCAG 2.0 AA

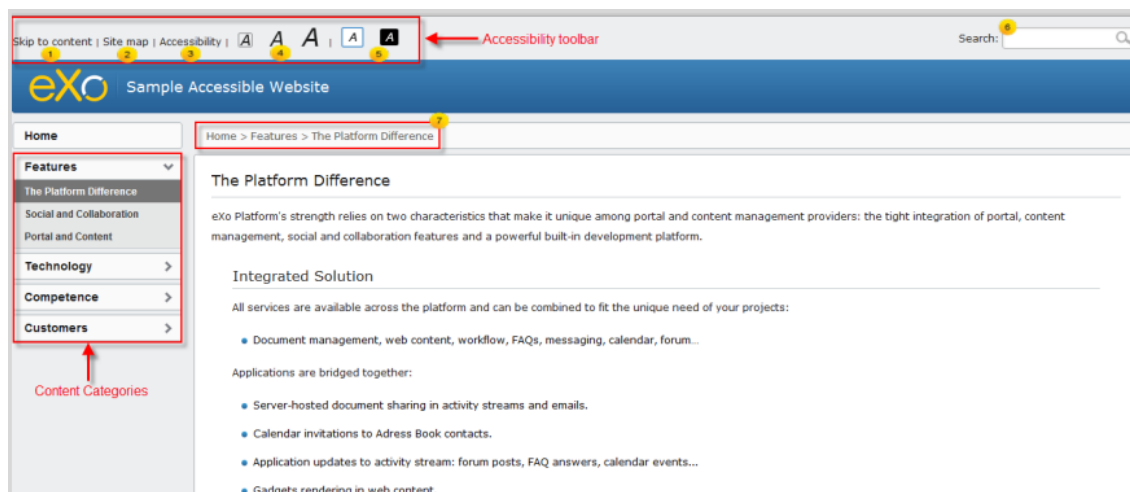
#### Create an accessible site

To create an accessible site, simply follow steps described in the [Create a new portal](#) section. Next, in the **Portal Templates** tab, select **Sample Accessible Website** from the templates list.

#### Access an accessible site

After creating the accessible site, you can access the site by hovering your cursor over **My Sites** on the **Administration** bar, then selecting the newly created accessible portal from the drop-down menu.

The homepage of the accessible portal appears as below.



### Features of an accessible portal

The accessible portal provides you with some following features:

- **Skip to content** <sup>1</sup>: Allow you to ignore navigation links, banner, or redundant information, and directly go to the main content of a page.
- **Site map** <sup>2</sup>: Show a list of pages of the current template.
- **Accessibility** <sup>3</sup>: Allow you to access a specific page about the accessibility policy. It explains what the accessibility is, how to navigate into the site, and describes the available features of the accessible portal.
- **Font size** <sup>4</sup>: Allow you to select your desired font size, including **Normal**, **Medium**, and **Large** sizes. The default size is **Normal**.
- **Color themes** <sup>5</sup>: Allow you to change the skin color of the website into **High Contrast**, or return to the default skin with **Normal Contrast**.
- **Search** <sup>6</sup>: Allow you to search for accessible content in the website.
- **Breadcrumb** <sup>7</sup>: Allow you to ease and keep a consistent navigation. With the breadcrumb, you can easily navigate in an accessible website.
- **Navigation without JavaScript**: One of the successful criteria of a website is to have accessible links and menu before the content when it is displayed like a screen reader. If JavaScript is disabled, you are still able to navigate, and the menu is expanded by default in this case.

#### See also

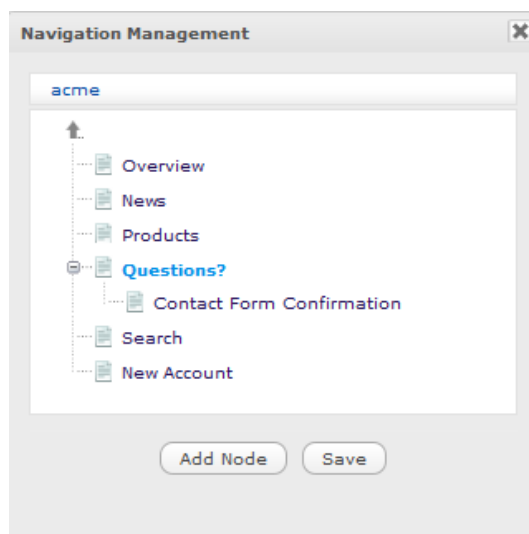
- [Manage permissions](#)
- [Manage sites](#)
- [Manage navigation nodes](#)
- [Manage pages](#)
- [Manage applications](#)

## 7.4. Manage navigation nodes


In the following sections, you will learn to [Add a new node](#)[431], [Edit a node](#)[434], [Copy/Paste a node](#)[434], [Clone a node](#) [434], [Cut a node](#) [434], [Delete a node](#) [434], [Change nodes order](#) [435].



If you are the portal administrator or granted the appropriate permission privileges by the portal administrator, you can execute some special actions related to portal nodes, including copying, editing, cutting, cloning, deleting, adding existing nodes. To do so, you first need to go to the nodes list by following steps described in the [Edit navigation](#) section, then right-clicking your desired node to open the drop-down menu.



### Add a new node

1. Select **Add New Node** to create a node as a sub-node of the selected node.
  - If you want to create a new node at the root level of the portal, click , then right-click the empty space and select **Add New Node**;
  - Or, simply click the **Add Node** button.

The **Add/Edit Page Node** form appears.

2. Enter values in the **Page Node Settings** tab.

### Details:

Field	Description
<b>Asterisk (*)</b>	This mark next to each field means that it is required to enter values in the field.
<b>Uri</b>	An identification of the node that is auto-created after the new node has been created.
<b>Node Name</b>	

Field	Description
	The node name which must be unique. Only alphabetic, numeric and underscore characters are allowed with its length from 3 to 30 characters and without ANY SPACES.
<b>Extended Label Mode</b>	Tick this checkbox to activate the extended label mode for your page node's label. If this checkbox is deselected, the <b>Language</b> field will disappear.
<b>Language</b>	Select your desired language for the node label from the drop-down menu.
<b>Label</b>	The display name of the node on the screen in the selected language. This field is not required and may be changed. Its length must be between 3 and 120 characters, including SPACES. For example, if you want to create a French label for your node, first select the <b>Extended Label Mode</b> checkbox. Next, from the <b>Language</b> drop-down list, select your desired language and enter your French label into the <b>Label</b> field.
<b>Visible</b>	This checkbox enables the page and its node to be shown or hidden at the navigation bar and sitemap.
<b>Publication Date &amp; Time</b>	This option enables this node to be published for a given period. Two fields, including <b>Start Publication Date</b> and <b>End Publication Date</b> only display when this option is checked.
<b>Start Publication Date</b>	The start date and time to publish the node.
<b>End Publication Date</b>	The end date and time to publish the node.



#### Note

You can set date and time by clicking **Start Publication Date** and **End Publication Date** and selecting a date from the calendar pop-up.

3. Select a page for this node in the **Page Selector** tab if you want.

The screenshot shows a web interface for adding or editing a page node. The title bar says 'ADD/EDIT PAGE NODE'. There are three tabs: 'Page Node Settings', 'Page Selector' (which is active), and 'Icon'. Under the 'Page Selector' tab, there is a section titled 'Selected Page Info' with a blue header. Inside this section, there are three input fields: 'Page Id:', 'Name:', and 'Title:'. The 'Name' field has an asterisk (\*) next to it. To the right of these fields is a blue circular button with a white checkmark. Below the input fields are three buttons: 'Clear Page' (with a trash icon), 'Create Page' (with a plus icon), and 'Search and Select Page' (with a magnifying glass icon). At the bottom of the dialog are two buttons: 'Save' and 'Back'.

#### Details:

Field	Description
<b>Page Id</b>	

Field	Description
	The identification string of the page which is created automatically.
<b>Name</b>	The selected page's name.
<b>Title</b>	The selected page's title.
<b>Clear Page</b>	Remove the inputted page information from fields.
<b>Create Page</b>	Create a new page with the inputted name and the title.
<b>Search and Select Page</b>	Search and select an existing page.

- If you select **Create Page**, input the name and title for the page.
- If you select **Search and Select Page**, you do not need to enter values in these fields. They are automatically recorded after you have selected an existing page from the **Select Page** form.

Page Id	Title	Access Permission	Edit Permission	Action
portal::acme::overview	Overview	[Everyone]	editor:/platform/web-	✓
portal::acme::news	News	[Everyone]	editor:/platform/web-	✓
portal::acme::product	Products	[Everyone]	editor:/platform/web-	✓
portal::acme::search	SearchResult	[Everyone]	editor:/platform/web-	✓
portal::acme::detail	Detail	[Everyone]	*:/platform/administr	✓
portal::acme::catalog	Catalog	[Everyone]	*:/platform/administr	✓
portal::acme::printvie	Print viewer	[Everyone]	*:/platform/administr	✓
portal::acme::pclv	Parameterized Conte	[Everyone]	*:/platform/administr	✓
portal::acme::catego	Category navigation	[Everyone]	*:/platform/administr	✓

This window lists all existing pages of **Portal** or **Group** with basic information for each page.

You can select a page for creating a node by simply clicking ✓, or search for a specific page as follows:

i. Enter your page title into the **Title** field to search by title;

Or, enter the site name into the **Site Name** field to search by the page's site name;

Or, enter values into both fields to further limit your search results by both **Title** and **Site Name**.

ii. Select the area in which you want to search into the **Type** field.

iii. Click 🔍 to perform your search. All pages matching your search criteria will be listed.

iv. Click ✓ on the row of the page to select.

After selecting a page, you will see the page details in the **Page Selector** form.

4. Select one icon in the **Icon** tab if you want.
5. Click **Save** to accept the new node page, or **X** to close the 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 cannot 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.

### Edit a node

This function is used to edit the node settings and reselect a page for a node.

1. Select **Edit this Node** from the drop-down menu to open the form with all similar fields when you [add a new node](#).  
[431]
2. Change values in fields of the current node, except the **Node Name**.
3. Click **Save** to complete your changes.

### Copy/Paste a node

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

1. Select **Copy Node** from the drop-down menu.
2. Right-click the position you want to paste this node and select **Paste Node**.
3. Click **Save** to accept your changes.



#### Note

Two same node names in the same place are NOT allowed.

### Clone a node

The **Clone Node** function allows you to copy a node. The difference between **cloning** and **copying** a node is that the cloned 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 pages list when you access the **Pages Management** page.

1. Select **Clone Node** from the drop-down menu.
2. Right-click the position that you want to paste this node and select **Paste Node**.

The cloned node will be reproduced in a new place.

3. Click **Save** to accept your changes.

### Cut a node

This function enables you to change the position of a specific node, such as changing the page path.

1. Select **Cut Node** from the drop-down menu.
2. Select the position that you want to paste this node, then click **Paste Node**.
3. Click **Save** to accept your change.

The cut node will be moved to your newly selected place.



#### Note

Two same node names in the same place are not allowed.

### Delete a node

This function is used to remove a node linking to a page. After the node has been removed, the page has been still existing.

1. Select **Delete Node** from the drop-down menu.
2. Click **OK** in the confirmation message to accept your deletion.
3. Click **Save** to accept your change.

### Change nodes order

You can easily move the position of nodes up or down in the navigation bar following these steps:

1. Select **Move Up** or **Move Down** from the drop-down menu.
2. Click **Save** to accept your changes.

### See also

- [Manage permissions](#)
- [Manage sites](#)
- [Manage a sample accessible website](#)
- [Manage pages](#)
- [Manage applications](#)

## 7.5. Manage pages

- [Add a new page using Page Creation Wizard](#)

The whole process to create a new page using **Page Creation Wizard**, including: selecting a navigation node and creating the page, selecting a page layout template, and finally arranging the page layout.

- [Add a new page using Page Management](#)

Step-by-step instructions on how to add a new page using **Page Management**.

- [Edit a page](#)

Steps and ways to edit the page properties and layout.

- [Delete a page](#)

Steps to remove a page.

- [Manage page navigation](#)

Information and actions related to the page navigation of portal/user/group.

### See also

- [Manage permissions](#)
- [Manage sites](#)
- [Manage a sample accessible website](#)
- [Manage navigation nodes](#)
- [Manage applications](#)

### 7.5.1. Add a new page using Page Creation Wizard

The **Page Creation Wizard** is available to the portal's administrators and facilitates them to create and publish portal pages quickly and easily. The whole process to create a new page can be divided into **3** specific steps:

## Select a navigation node and create the page

In the first step, you have to set **Node Name** and **Display Name** of your page. You are also able to decide the pages visibility and the publication period of the page.

1. Hover your cursor over **My Sites** and click one portal/site to which you want to add a new page from the drop-down menu.

You will be switched to your selected portal only after a few seconds.

2. Hover your cursor over **Edit** on the **Administration** bar.
3. Select **Page** --> **Add Page** from the drop-down menu to open the **Page Creation Wizard** form.

The wizard is divided into two sections.

- The left pane contains existing pages/nodes displayed in the tree hierarchy. Here, you can navigate up and down the node/page structure.
- The right pane displays **Page Editor** where you can make changes on the selected navigation node. You can input parameters for your new page in this pane.

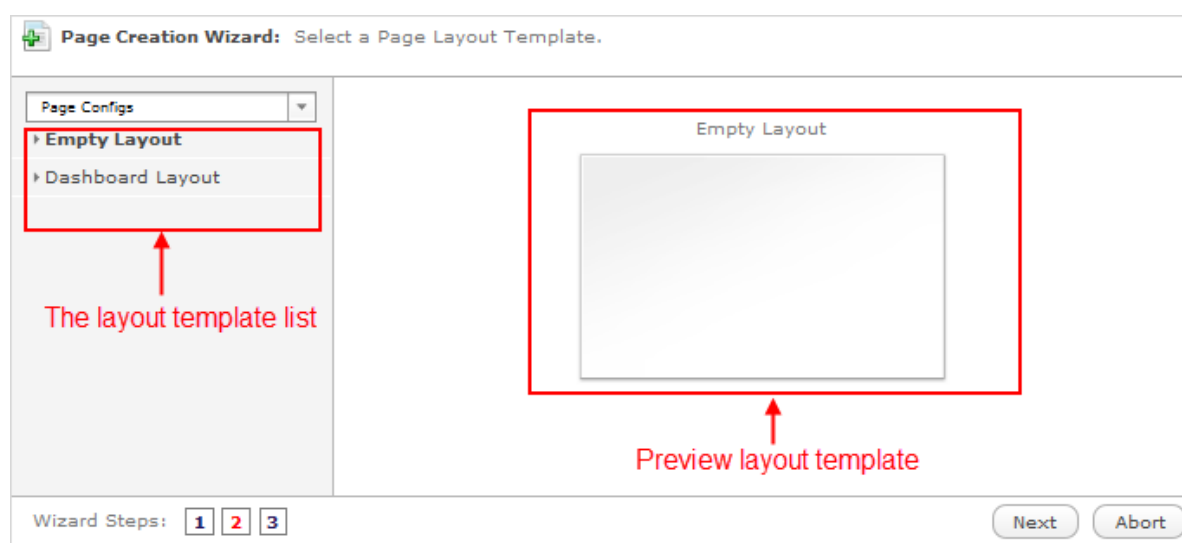
### Details:

Field	Description
<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 is required with its length between 3 and 30 characters.
<b>Extended Label Mode</b>	Tick the checkbox to show the <b>Language</b> field for you to select another language for your created node's display name. It means that if this checkbox is deselected, the <b>Language</b> field will be deactivated.
<b>Language</b>	Select your desired language for the node's display name from the drop-down menu.
<b>Display Name</b>	The display name of the node which contains the added page and must have a length between 3 and 120 characters.
<b>Visible</b>	This checkbox toggles the global visibility of this page.  If this option is checked, the page or the page node appears on the navigation bar, the page navigation and

Field	Description
	the sitemap. If "Visible" is checked, the visibility also depends on the <b>Publication Date &amp; Time</b> option.  If not being unchecked, the page is hidden under any circumstances, even if the publication period is valid.
<b>Publication Date &amp; Time</b>	This option allows the page to be published for a given period. If this option is checked, <b>Start Publication Date</b> and <b>End Publication Date</b> will be shown.
<b>Start Publication Date</b>	The start date and time to publish the page.
<b>End Publication Date</b>	The end date and time to publish the page.

4. Click **Next** or number '2' of the wizard steps to go to [Step 2. \[437\]](#)

#### Select a page layout template

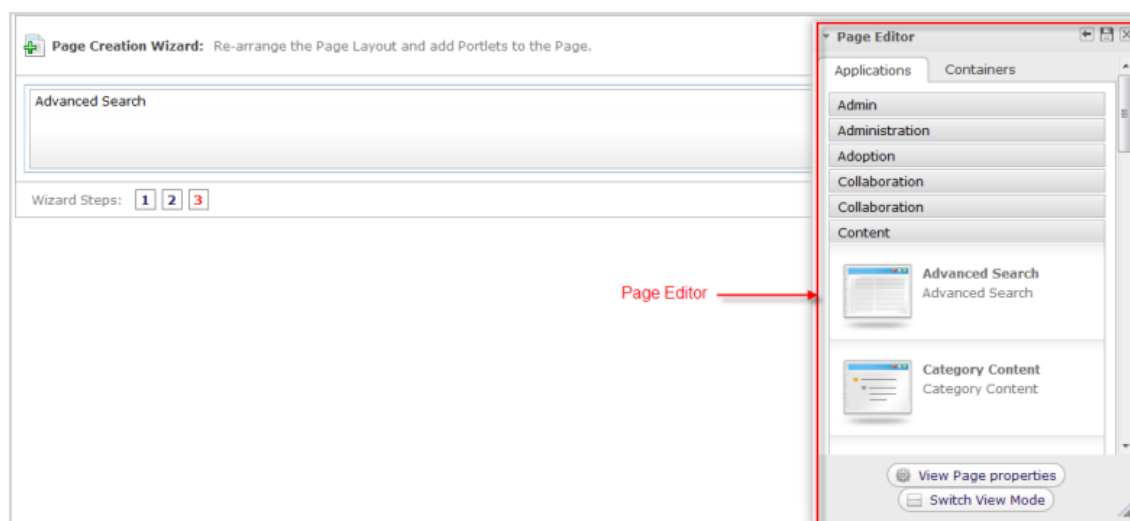


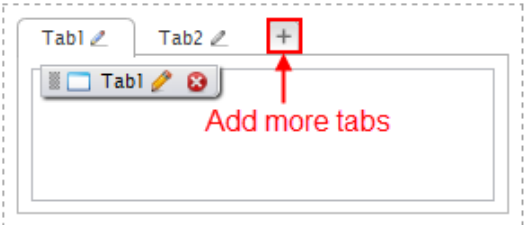
1. Select **Empty Layout** or click the down-arrow icon in the right pane to see more templates.
2. Click **Next** or number '3' of the wizard steps to go to the [last step. \[437\]](#)

#### Arrange the page layout

In this step, you can arrange the page's layout as follows:



- Add your desired applications, containers or gadgets by dragging and dropping them from **Page Editor** to the main page body.

**Details:**

Tab	Description
<b>Applications</b>	This tab lists all existing categories and their portlets that you easily can drag and drop into the container.
<b>Containers</b>	<p>This tab contains all existing containers to build your page layout. You can add a container to your page area by dragging and dropping available containers from <b>Page Editor</b> to the main page body.</p> <ul style="list-style-type: none"> <li>There are various layouts available, including <b>Rows Layout</b>, <b>Columns Layout</b>, <b>Autofit Columns Layout</b>, <b>Tabs Layout</b>, and <b>Mixed Layout</b>.</li> </ul> <p>For <b>Tabs Layout</b>, you can add more tabs to the layout, and reorder the position of the tabs.</p>  <ul style="list-style-type: none"> <li>For each layout, you can edit different layers, from the parent container to its child containers. The parent container holds its child containers and the child containers can hold applications. You can also drag a container to another one that helps you create various layouts to your desires.</li> <li>Remember that you can also drag and drop the container to another one that helps you create your own various layouts to your desires.</li> <li>For any container layout, you can edit the parent container or its child containers separately. Deleting</li> </ul>





Tab	Description
	<p>the parent container means that its child containers are removed as well.</p> <ul style="list-style-type: none"> <li>You cannot drag and drop a child container to change its location, but can drag it outside its parent container.</li> </ul>


- Rearrange elements in the page body by dragging and dropping them into your desired positions. Also, you can edit or remove any element by hovering your cursor over it and selecting , or  respectively.
- View page properties by clicking **View Page Properties** at the bottom of the **Page Editor** window.
- Preview your changes by clicking **Switch View Mode**.



### Note

Click  in the **Page Editor** window to save all changes, or  to close without saving your changes.

## 7.5.2. Add a new page using Page Management

- Hover your cursor over  to open the drop-down menu.
- Select **Portal --> Pages** to go to the **Pages Management** page.

Title

Site Name

Type 

portal

Page Id	Title	Access Permission	Edit Permission	Action
portal::acme::overview	Overview	[Everyone]	editor:/platform/web-contributo	<div><div></div><div></div></div>
portal::acme::news	News	[Everyone]	editor:/platform/web-contributo	<div><div></div><div></div></div>
portal::acme::products	Products	[Everyone]	editor:/platform/web-contributo	<div><div></div><div></div></div>
portal::acme::searchResult	SearchResult	[Everyone]	editor:/platform/web-contributo	<div><div></div><div></div></div>
portal::acme::detail	Detail	[Everyone]	*:/platform/administrators	<div><div></div><div></div></div>
portal::acme::catalog	Catalog	[Everyone]	*:/platform/administrators	<div><div></div><div></div></div>
portal::acme::printviewer	Print viewer	[Everyone]	*:/platform/administrators	<div><div></div><div></div></div>
portal::acme::pclv	Parameterized Content List View	[Everyone]	*:/platform/administrators	<div><div></div><div></div></div>
portal::acme::category	Category navigation portlet	[Everyone]	*:/platform/administrators	<div><div></div><div></div></div>

Add New Page

- Click **Add New Page** to open the **Add New Page** form with the **Page Settings** tab.


Page Settings

Page Layout

Permission Settings

Page Id:

Owner Type:

portal 

Owner Id:

acme

Page Name:

\*

Page Title:

Show Max Window:

☐

Save

Cancel

### Details:

Field	Description
<b>Page Id</b>	The page's identification string which will be automatically generated when the page is created.
<b>Owner Type</b>	<ul style="list-style-type: none"> <li>• If <b>Owner Type</b> is "<i>portal</i>", the page is created for a portal. Therefore, only users who have the <i>Edit</i> permission on the portal can create this page type.</li> <li>• If <b>Owner Type</b> is "<i>group</i>", the page is created for a group. Therefore, only users who are the <i>manager</i> of that group can create this page type.</li> </ul>
<b>Owner Id</b>	<p>The identification name of the page's owner which will be automatically created after you have selected <b>Owner Type</b>.</p> <ul style="list-style-type: none"> <li>• When the owner type is set to "group", a list of groups will allow you to select one user as the 'owner'.</li> <li>• The name of the current portal is automatically selected for <b>Owner Id</b>, ensuring the <i>Edit</i> permission is assigned to users who can edit the current portal.</li> </ul>
<b>Page Name</b>	The page name which is required and must be unique. Only alphabetical, numerical and underscore characters are allowed with its length from 3 to 30 characters.
<b>Page Title</b>	The page title which is optional with its length from 3 to 30 characters.
<b>Show Max Window</b>	The option enables the page to be shown at the maximum size or not.

- Define the page layout in the **Page Layout** template.
- Define permissions in the **Permission Settings** tab. This tab consists of two sub-tabs named **Access Permission Settings** and **Edit Permission Settings**.
  - The **Access Permission Settings** tab shows all users who can access the page:
    - If the value of the **Owner Type** field is "*Portal*", the name of the current portal is automatically selected for the **Owner Id** field, so that the *Access* permission is assigned to all users who can access the current portal.
    - If the value of the **Owner Type** field is "*Group*", the *Access* permission is assigned to all users who are the members of the group that is selected in the **Owner Id** field of the **Page Settings** tab.

To reassign the *Access* permission for the page, see details in the [Access permission \[420\]](#) section.
  - The **Edit Permission Settings** shows all users who have the *edit* permission on the page.
    - If the value of the **Owner Type** field is "*Portal*", the *Edit* permission is assigned to users who can edit the current portal.
    - If the value of the **Owner Type** field is "*Group*", the *Edit* permission is assigned to all users who are the members of the group that is selected in the **Owner Id** field of the **Page Settings** tab.

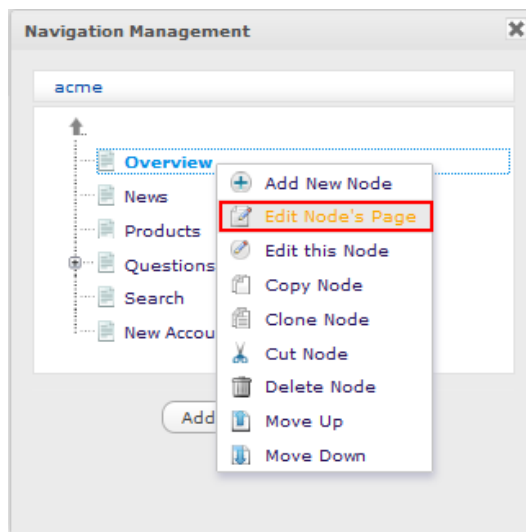
To reassign the *Edit* permission for the page, see details in the [Edit Permission \[421\]](#) section.
- Click **Save** to accept creating a new page.

### 7.5.3. Edit a page

- Open the **Page Properties** page by following one of the two ways:

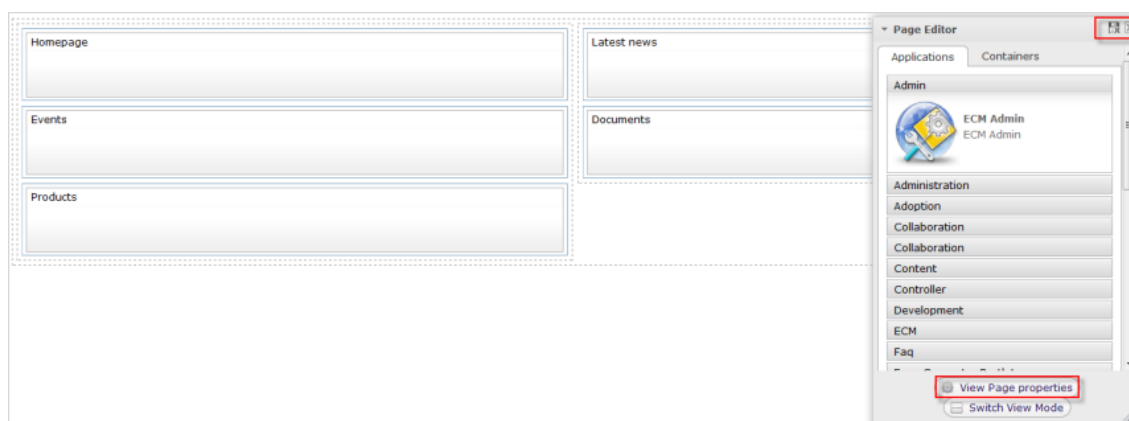
**The first way**

- i. Open the **Navigation Management** form by doing the steps in the [Edit navigation](#) section.
- ii. Right-click your desired node and select **Edit Node's Page** from the drop-down menu.

**The second way**

- i. Hover your cursor over and select **Portal --> Pages** to open the **Pages Management** page.
- ii. Click corresponding to the page you want to edit.

The **Edit Page** form will be displayed in the **Page Properties** window.





2. Click **View Page Properties** in the **Page Editor** window to edit page properties.
  - i. In the **Page Settings** tab, you cannot change values in **Page Id**, **Owner Type**, **Owner Id**, and **Page Name**.
  - ii. In the **Permission Settings** tab, you can change or add more *Access* and *Edit* permissions. This form is only supported for pages of a *group* or a *portal*. Because the user's page is private, no one can access or edit it, except the creator.

**Note**

For more details on how to assign permissions on a page, refer to the [Set permissions on a page](#) section.

3. Click **Save**, then select in **Page Editor** for all changes to take effect, or to abort.

### 7.5.4. Delete a page

1. Hover your cursor over  and select **Portal --> Pages** to open the **Pages Management** page. You will see a list of all existing pages.
2. Click  in the row of the page you want to delete.
3. Click **OK** in the confirmation message to accept your deletion.

### 7.5.5. Manage page navigation

Navigation types in eXo Platform are outlined in the [Manage navigation nodes](#).

#### 7.5.5.1. Portal's page navigation

The `/platform/administrators` group can do actions related to the page navigation of a portal, including adding/deleting portals, editing the layout/navigation/portal configuration.



#### Note

The page navigation of portal is created automatically when a portal is created.  
The navigation will be deleted automatically after its portal has been deleted.

#### 7.5.5.2. User's page navigation

Actions related to the page navigation of users include adding a new page, editing a page/page layout. These actions are based on permission settings set to a page.




#### Note

The page navigation of a user will be created automatically when the user is created (registered).  
Only the user who is the owner of the user page navigation can edit it.  
No one can create a user page navigation so that no one can delete it. The navigation will be deleted automatically when its user is deleted.

#### 7.5.5.3. Group's page navigation

Each group has only one page navigation. Only managers of the navigation group and users of the administrators group can add/list/edit/delete the navigation or edit properties.

To manage the group's page navigation, hover your cursor over  on the **Administration** bar, then select **Portal --> Group Sites** from the drop-down menu.

The **Group Navigation Management** page will appear.

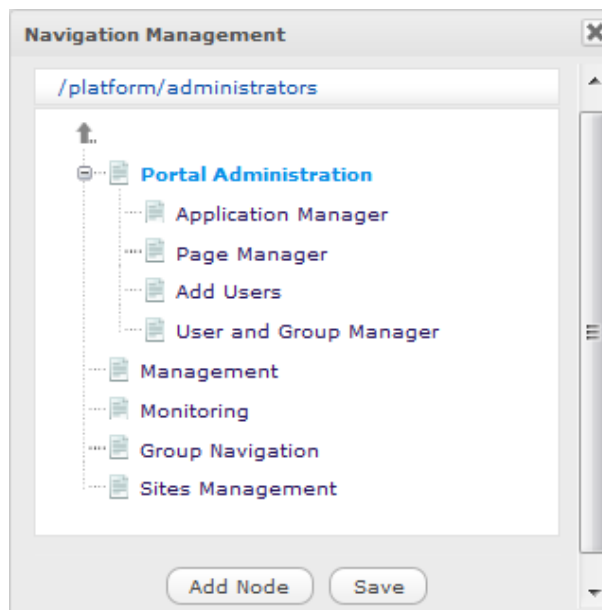
<b>Content Management</b> Description: the /platform/web-contributors group	Edit Navigation	Edit Properties	Delete Navigation
<b>Administration</b> Description: the /platform/administrators group	Edit Navigation	Edit Properties	Delete Navigation
<b>Development</b> Description: the /developers group	Edit Navigation	Edit Properties	Delete Navigation
<b>Executive Board</b> Description: the /organization/management/executive-board group	Edit Navigation	Edit Properties	Delete Navigation
<b>Employees</b> Description: the /organization/employees group	Edit Navigation	Edit Properties	Delete Navigation
<b>Visitors</b> Description: the /platform/users group	Edit Navigation	Edit Properties	Delete Navigation
Add Navigation			

Here, you can do many actions, including:

- [Edit a group's page navigation](#)
- [Create a new page navigation](#)
- [Change priority of page's navigation](#)
- [Delete a group's navigation](#)

#### 7.5.5.3.1. Edit a group's page navigation

Click **Edit Navigation** corresponding to the group navigation you want to edit. The **Navigation Management** form will appear.



In this form, you can edit the group's page navigation through doing many actions, such as adding a new node to this group, cloning, moving up/down, and more. To learn more about specific actions, refer to the [Manage navigation nodes](#) section.

#### 7.5.5.3.2. Create a new page navigation



##### Note

Only users who are "managers" of a group can create new pages for that group, while others in this group cannot.

1. Select **Add Navigation** at the bottom of the **Group Navigation** form. The groups list will be displayed with the **Add Navigation** buttons.
2. Click **Add Navigation** corresponding to the group you want to add the new page navigation.

After being added, the new group navigation will be displayed in the **Group Navigation** page.

Each group has only one navigation. If you add a new group navigation that has been existing, there will be a message, informing that you cannot create the navigation.

### 7.5.5.3.3. Change priority of page's navigation

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

1. Click **Edit Properties** corresponding to the navigation you want to edit.

The **Page Navigation Form** will appear.

2. Select another priority from the list of available priorities.
3. Click **Save** to accept changes.

### 7.5.5.3.4. Delete a group's navigation

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

1. Click **Delete Navigation** corresponding to the navigation you want to delete.
2. Click **OK** in the confirmation message to accept your deletion.

After the navigation deletion has been confirmed, the selected navigation will be removed from the **Group Navigation** page and its nodes/hyperlinks to pages will also be deleted.

## 7.6. Manage applications

- [Inside a portal](#)

Information related to managing gadgets and portlet. Also, this section introduces you to the **Dashboard** portlet which hosts many mini-applications known as gadgets.

- [Use Gadgets in your dashboards](#)

Introduction to various types of gadgets, including Engagement, Management and Monitoring, Audit and Collab, Intranet gadgets and how to use them.

- [Inside Desktop](#)

Introduction to the **Desktop** application, and actions you can do in this application.

In eXo Platform, applications can be managed [inside a portal](#) or [inside Desktop](#).


#### See also

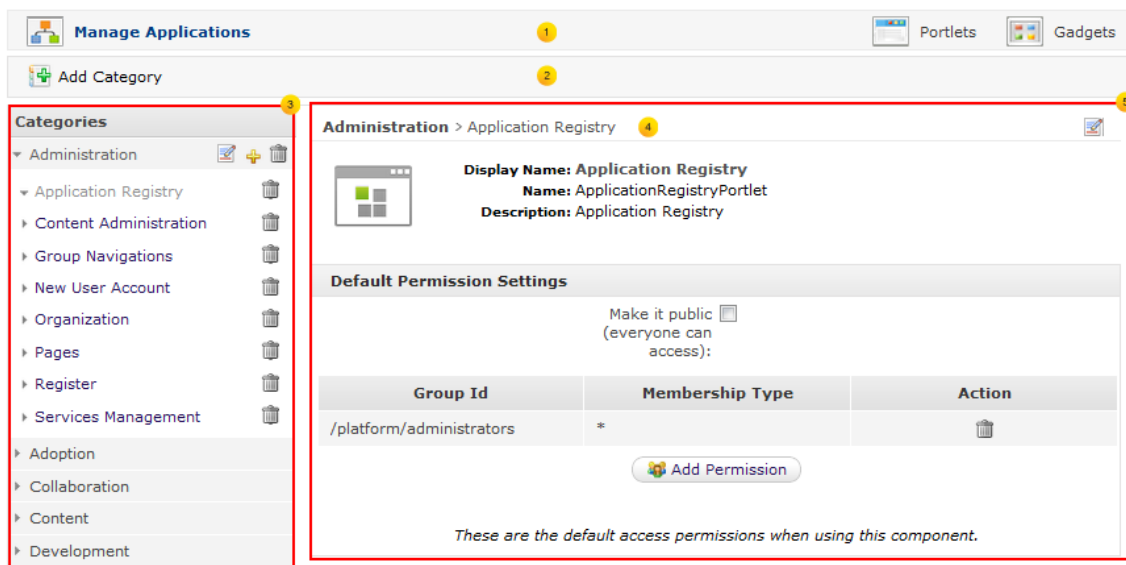
- [Manage permissions](#)

- [Manage sites](#)
- [Manage a sample accessible website](#)
- [Manage navigation nodes](#)
- [Manage pages](#)

## 7.6.1. Inside a portal

### 7.6.1.1. Categories, Portlets and Gadgets Administration

To manage categories, portlets and gadgets in a portal, you first need to go to the **Manage Applications** page by hovering your cursor over  on the **Administration** bar, and select **Applications**. The **Manage Applications** page will appear.



Details:

- **1 Tab bar** consists of three items, including Categories, Portlet, Gadget.
- **2 Action bar** consists of some actions related to a category.
- **3 Left pane** lists all categories and portlets of each category.
- **4 Breadcrumb bar** is the path from a specific category to a specific portlet in that category.
- **5 Right pane** provides detailed information of a specific portlet.

Portlets and gadgets are organized into different categories. Each category contains one or several portlets or gadgets. You can also mix portlets and gadgets into one category. By default, all gadgets are placed in the *Gadgets* category.


Here, you can do the following actions:

- [Manage categories](#)
- [Manage portlets and gadgets](#)
  - [Add portlets/gadgets to the Application list](#)
  - [Activate the Import Applications function](#)
  - [Import portlets and gadgets](#)
  - [View/Edit detailed information of a portlet/gadget](#)
  - [Edit a specific portlet](#)
  - [Add a gadget](#)

- [Add a new gadget from Dashboard](#)
- [Edit a gadget](#)

### 7.6.1.1.1. Manage categories

#### 7.6.1.1.1.1. Add a new category

1. Click  **Add Category** on the **Action** bar to open the form to add a new category.

##### Details:

In the **Category Setting** tab:

##### Category name

The category's name that you want to add. This field is required and its length must be between 3 and 30 characters.

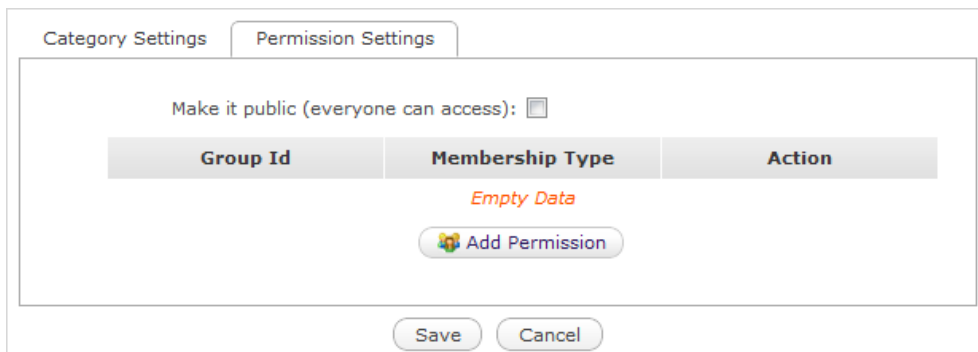
##### Display name

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

##### Description

A brief description of the category. Any length from 0 to 255 characters is allowed.


2. Enter values in the **Category Setting** tab.
3. Set the Access permission for your category. Accordingly, another users can only view and use portlets in your category to which they have access.




For more details about how to set the Access permission, refer to [Section 7.1, "Manage permissions"](#).

4. Click **Save** to accept adding a new category to the categories list. Your newly created category will be added to the list in the left pane.

#### 7.6.1.1.1.2. Edit a Category

1. Click  located next to the title bar.
2. Update the category information.
3. Click the **Save** button to apply changes.

#### 7.6.1.1.1.3. Delete a Category

1. Click  located next to the title bar.
2. Click **OK** to accept deleting in the confirmation message.

#### 7.6.1.1.1.4. Add Portlets/Gadgets to a Category

This function helps you add portlets to a specific category easily as follows:

1. Click  located next to the category name to which you want to add portlets/gadgets.



### Display name

The display name of a portlet/gadget.

### Application Type

Either Portlet or Gadget.

2. Enter the display name and select an application type.
3. Select a portlet/gadget by checking the radio button.
4. Click **Save** to add the selected portlet/gadget to the category.

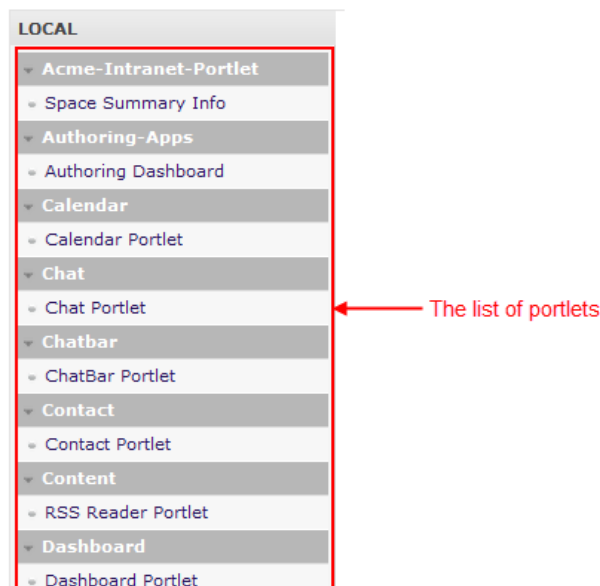
The selected portlet/gadget will be added to the category in the left pane.

## 7.6.1.1.2. Manage portlets and gadgets

### 7.6.1.1.2.1. Add portlets/gadgets to the Application list

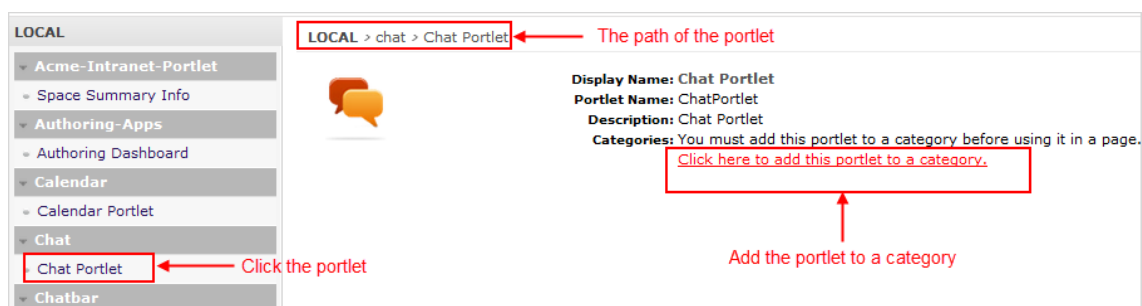
This section shows you how to add a portlet/gadget to the **Application** list on the left pane of the **Manage Application** page.

1. Click **Portlets/Gadgets** on the **Tab** bar to open a list of portlets/gadgets respectively.



2. Click the portlet/gadget which you want to add to the **Application** list.

The information of the portlet/gadget is displayed.



3. Click the **Click here to add this portlet to a category** link to open a form which allows you to select a category for the portlet.

Choose	Category Name
<input type="checkbox"/>	Administration
<input type="checkbox"/>	Adoption
<input checked="" type="checkbox"/>	Collaboration
<input type="checkbox"/>	Content
<input type="checkbox"/>	Development

Total pages: 2    < 1 2 >

Save Cancel

4. Click **Save** to accept adding the portlet/gadget to the **Application** list.



#### Note

In case, the portlet/gadget was already added to the **Application** list, there will be no the **Click here to add this portlet to a category** link.

#### 7.6.1.1.2.2. Activate the Import Applications function

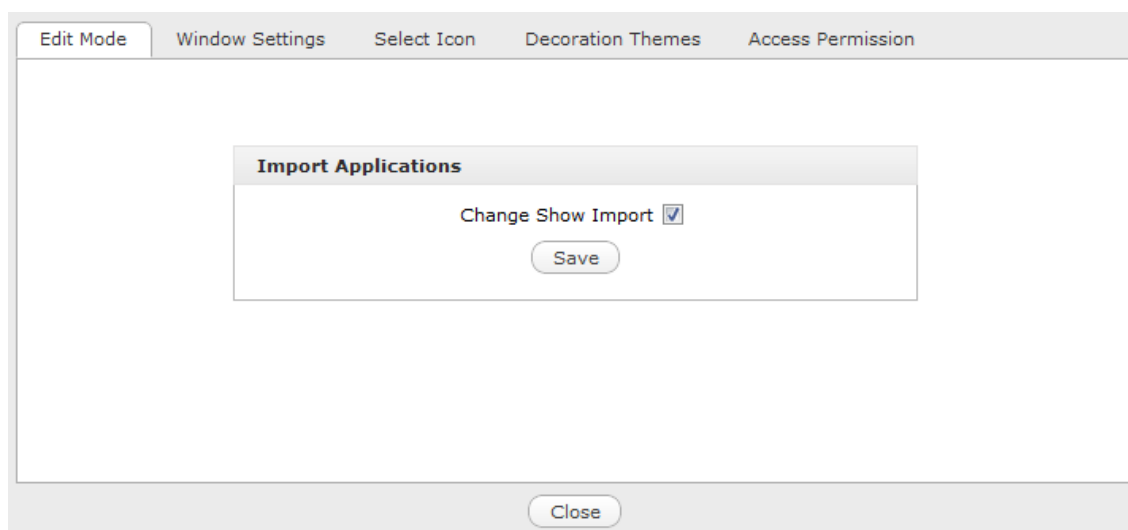


#### Note


You can perform this action only when you are a member of the `/platform/administrators` group.

By default, the **Import Applications** function is hidden. To activate it, you can do as follows:

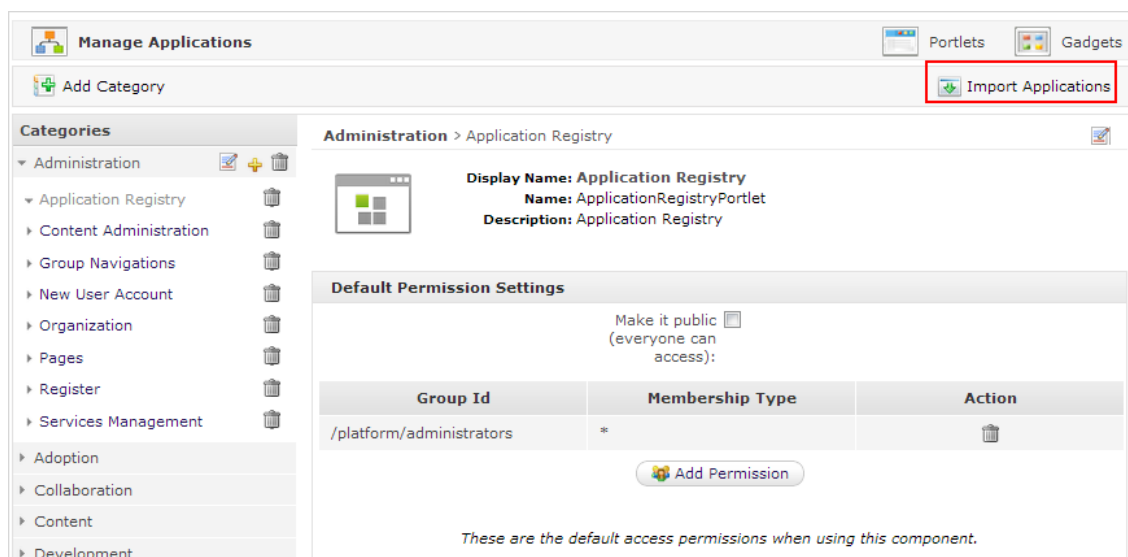
1. Go to the **Manage Applications page [445]** --> **Edit** --> **Page** --> **Layout** on the **Administration** bar.
2. Hover your cursor over the **Application Registry** portlet, then click  at the upper left corner of that portlet. The **Edit** form will be displayed.



3. Tick the **Change Show Import** checkbox, then click **Save** to accept the changes.

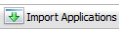
4. Click **Close** to close the **Edit** form, then click  to quit the **Page Editor** page.

The **Import Applications** button is displayed on the **Manage Applications** page.



#### 7.6.1.1.2.3. Import portlets and gadgets

This feature enables you to import default portlets and gadgets into different categories as follows:

1. Click  at the right corner on the **Action** bar.
2. Click **OK** in the confirmation message to accept importing portlets and gadgets automatically.

All portlets and gadgets of all categories will be imported and listed on the left pane.

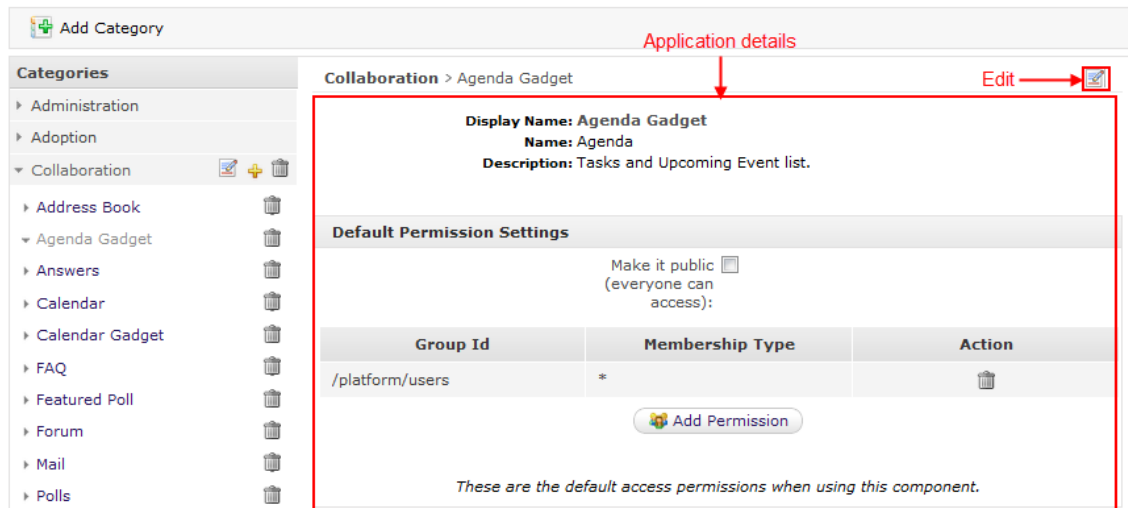


#### Note

You can see  only when the [Import Applications function](#) is activated.

#### 7.6.1.1.2.4. View/Edit detailed information of a portlet/gadget

To view details of a portlet/gadget, simply select one portlet/gadget in the left pane. The details of that portlet will be shown on the right pane.



### Left pane

All portlets and gadgets grouped by categories.

### Right pane

Details of a portlet: **Name**, **Display Name**, **Description**.

### Edit a portlet


1. Click  on the top corner of right pane.

The **Edit Application Information** form will appear.

2. Make changes on these fields, except **Application Name**.

#### 7.6.1.1.2.5. Edit a specific portlet

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

1. Define your desired portlet to check if this portlet has been existing in the portal or page. If not, drag and drop it from **Edit Inline Composer** to the main portal body while [editing the portal's layout](#), or from **Page Editor** to the main page body in the [Step 3 while creating a page \[437\]](#) and/or while [editing a page](#).
2. Hover your cursor over your desired portlet, then click  at the upper left corner of that portlet.  
The **Edit** form will be displayed.

Normally, a portlet has four tabs: **Window Settings**, **Select Icon**, **Decoration Themes** and **Access Permission**. However, some portlets may also have **Edit Mode** and **Preferences** tabs. For example, **IFrame** and **Dashboard** portlets have the **Edit Mode** tab where administrators can define the interface details.

3. Make changes on fields in the various tabs.

- The **Window Settings** tab allows you to change values related to settings of your selected portlet.

**Details:**

Field	Description
<b>Display Name</b>	The display name of portlet which cannot be changed.
<b>Window Title</b>	The portlet title with the length between 3 and 60 characters.
<b>Width</b>	The portlet's vertical size. The value of this field must be in numeric format.
<b>Height</b>	The portlet's horizontal size. The value of this field must be in numeric format.
<b>Show Info Bar</b>	The option enables the information bar to be shown or hidden. If the <b>Show Info Bar</b> checkbox is not selected, portlet mode and window state will not be displayed in that portlet.
<b>Show Portlet Mode</b>	The option enables the portlet mode to be shown or hidden.
<b>Show Window State</b>	The option enables the portlet's window state to be shown or not.
<b>Description</b>	The brief information of the portlet. The length must be between 0 and 255 characters.

- The **Select Icon** tab allows you to select an icon for the portlet. By clicking **Get Default**, you do not have to select any icon from the list, the suitable icon will be got automatically.
- The **Decoration Themes** tab allows you to select a theme for the portlet from the themes list. By clicking **Get Default**, you do not have to choose any theme, it will be automatically set.
- The **Access Permission** tab allows you to set the access permission on the portlet. The portlet can be made public to everyone or restricted to specific groups.

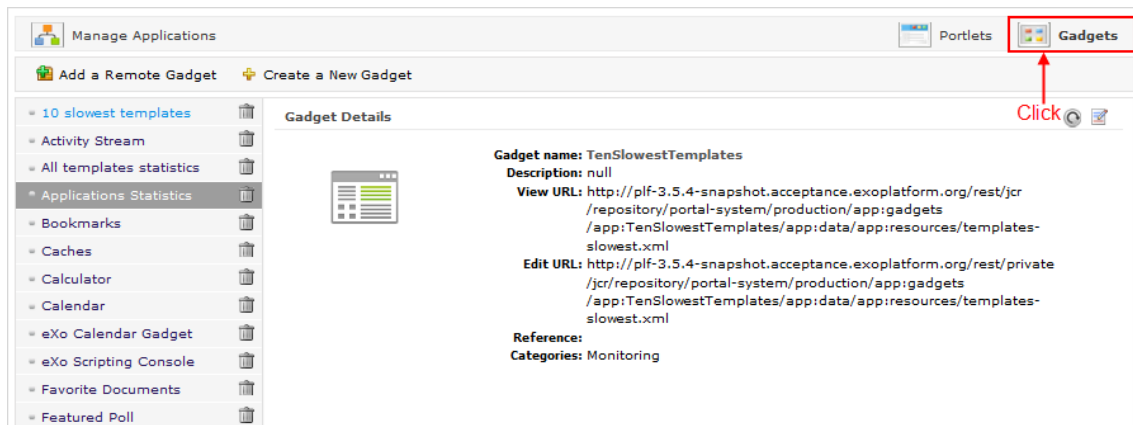
**Note**

See the [Set Access permission on a portlet](#) section for details on how to assign the access permission on a portlet.

- Click **Save And Close** to accept your changes.

### 7.6.1.1.2.6. Add a gadget

To add a gadget, you first need to turn into the **Gadget** page by selecting **Gadget** on the tab bar of the **Manage Applications** page.



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

#### Add a remote gadget

- Click the **Add a Remote Gadget** link.
- Enter the link of your desired gadget which is in the `.xml` format in the **Gadget URL** field.

**Gadget URL**  \*

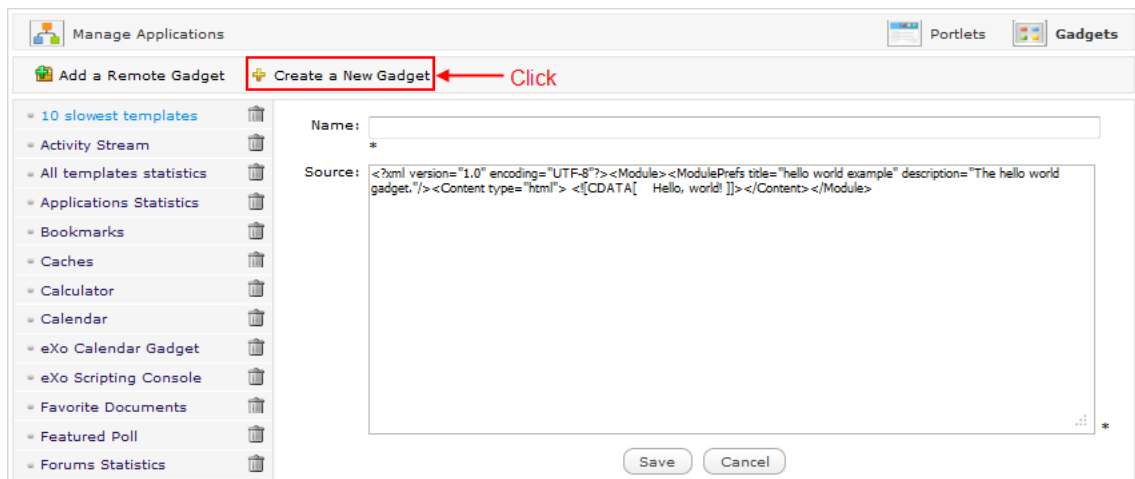
- Click **Add** to accept your inputted URL.

The selected gadget will be added to the gadgets list in the left pane with its details in the right pane.

#### Create a new gadget

- Click the **Create a New Gadget** link.
- Enter values in the form.

For example:




3. Click **Save** to accept creating your new gadget.



### Note

To add the newly added remote gadget to a specific category, simply click the "Click here to add into categories" link at the bottom of the right pane. The table listing all categories will appear that allows you to select your desired category.

To update information of the added gadget, simply click  to refresh information.

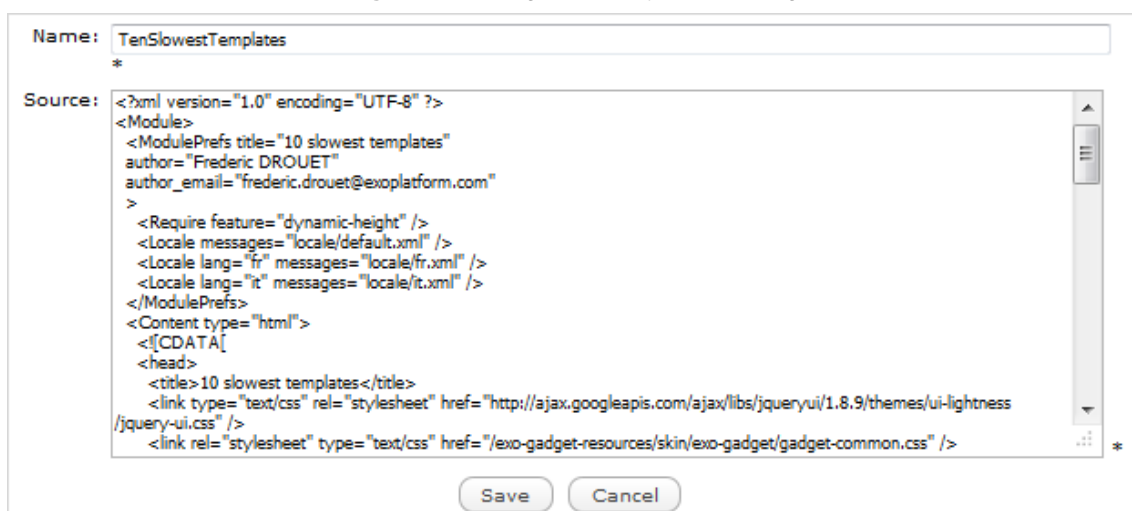
- You can delete a local gadget using  corresponding to each gadget in the left gadgets list.

#### 7.6.1.1.2.7. Add a new gadget from Dashboard

See the [Add more external gadgets from Dashboard](#) [455] section for instructions on how to add new gadgets from the dashboard.

#### 7.6.1.1.2.8. Edit a gadget

Click  located at the header of the **Gadget Details** page to display the following window.



#### 7.6.1.2. Dashboard portlet

This portlet is to host mini-applications known as gadgets. The dashboard uses a variety of graphical effects for displaying, opening and using gadgets.

In the Dashboard portlet, you can do some specific actions as follows:

- [Use the Dashboard workspace \[454\]](#)
- [Change gadget preferences \[454\]](#)
- [Add more external gadgets from Dashboard \[455\]](#)

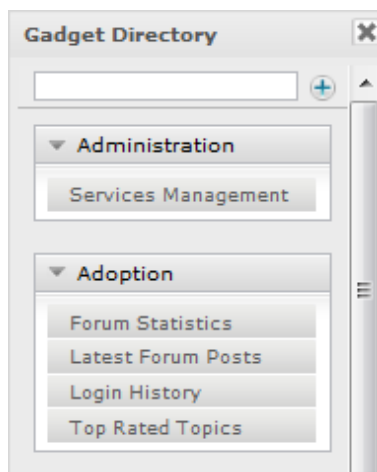


#### Note

You can open many gadgets with different settings at once.

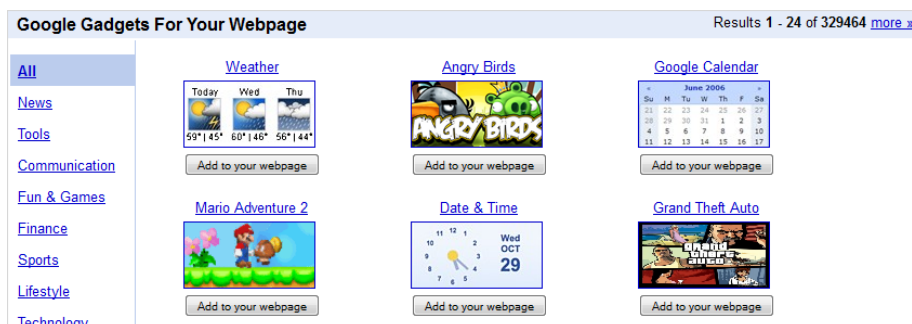
### Use the Dashboard workspace

1. Click **Dashboard** on the **Administration** bar to access the **Dashboard** portlet.
2. Click **Add Gadgets** to open the **Dashboard Workspace** window which lists all available gadgets.



3. Select a gadget in the **Dashboard Workspace** window.
4. Drag and drop the selected gadget into the workspace.

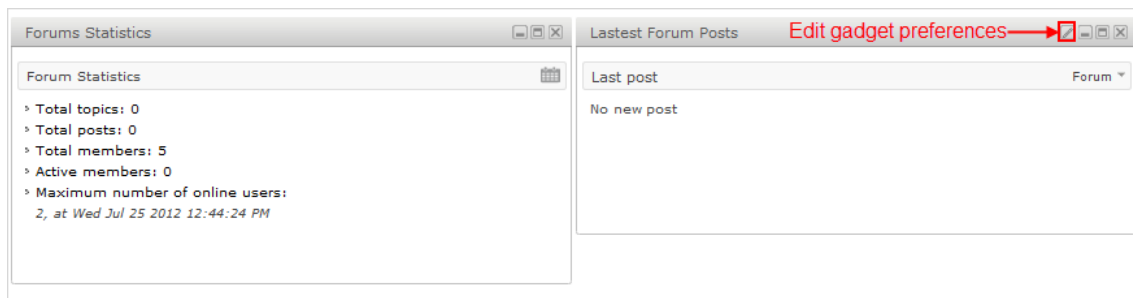
In addition, eXo Platform is compatible with most gadgets which can be found [here](#).




### Change gadget preferences

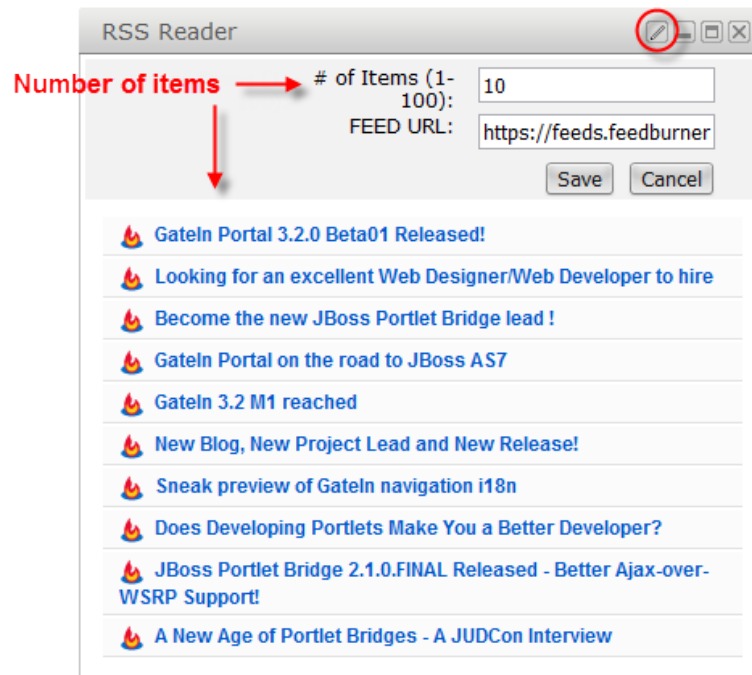
The edit icon on gadgets only displays when the gadget has some gadget preferences. This icon enables users to display the edit form and change preferences of a gadget.





The following is an example of changing preferences of the **RSS Reader** gadget.

1. Click  to open the edit form of the RSS gadget.



2. Enter your preferred RSS into the **FEED URL** field and one numeric character (from 1 to 100) in the **Items** field. The numeric character you entered is the number of items displayed in the RSS gadget.
3. Click **Save** to accept your changes.

#### Add more external gadgets from Dashboard

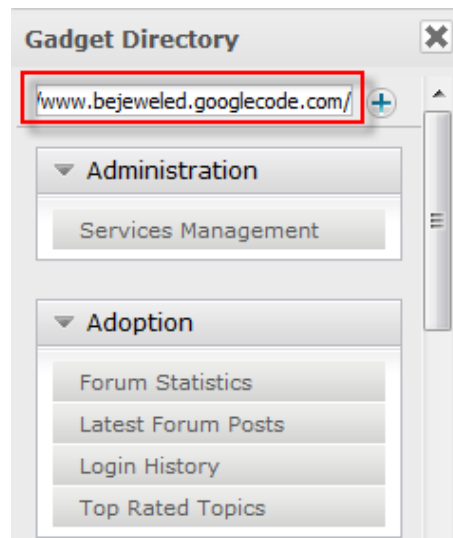
1. Obtain the URL (.xml or .rss) of the gadget you want to add from the gadgets source. For example, <http://bejeweledg.googlecode.com/svn/trunk/bejeweled.xml>.




#### Note

Remote gadgets can be only created using an .xml link or RSS URL. However, if you use a link that generates an RSS feed (for example, <http://feeds.feedburner.com/gatein>), a new RSS reader gadget will be created automatically even if the URL does not end with .rss.

2. Return to your portal and click **Dashboard** in the **Administration** bar.
3. Click **Add Gadgets** in the Dashboard to open the **Dashboard Workspace** window.
4. Paste the URL in Step 1 into the textbox.



5. Click  to add the new gadget to the page.

This section provides you with the information related to managing applications including gadgets and portlet. Also, you will learn about the Dashboard portlet which hosts many mini-applications known as gadgets.

## 7.6.2. Use Gadgets in your dashboards

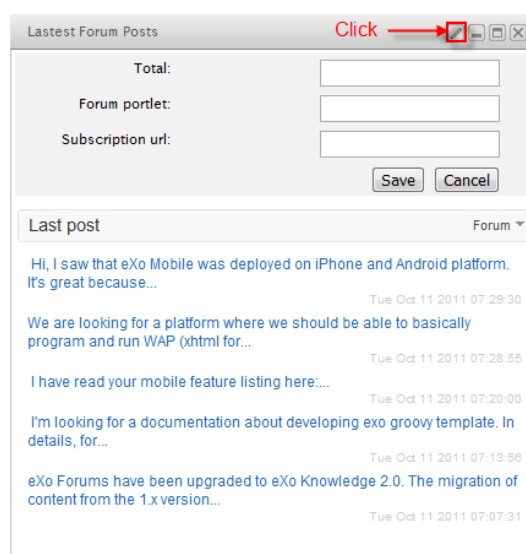
### 7.6.2.1. Engagement gadgets

**Engagement** gadgets include gadgets designed to aid users in engagement activities and events. These gadgets analyze the existing communications and community engagement in your organization, then show what is going on by providing statistics.


eXo Platform currently provides 4 types of **Engagement** gadget as follows:

#### Latest Forum

The **Latest Forum Posts** gadget shows the latest posts in Forum. You can decide the specified number of the latest posts to be shown. This gadget helps you always stay updated with what is going on in the forum.



- **Latest Forum Posts settings:**

1. Click  in the **Title** bar to open the form to edit the gadget settings.

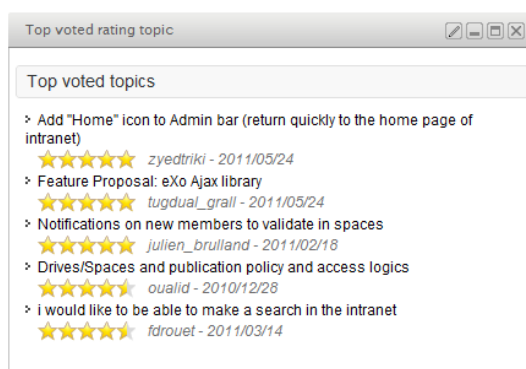
**Details:**

Field	Description
<b>Total</b>	The number of last posts to be displayed in this gadget.
<b>Forum portlet</b>	The URL pointing to the Forum portlet.
<b>Subscription url</b>	The link to the service which you request to get data from (in this case, the data are last posts). For example: http://mycompany.com:8080/portal/rest/ks/forum/getmessage.

2. Input the values for all the fields, then click **Save** to accept your changes.


**Top Voted Topics**

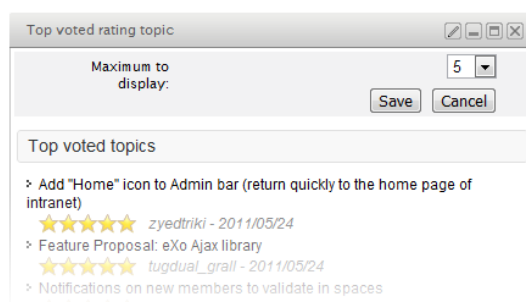
The **Top Voted Topics** gadget lists the highest rated topics in a forum. You can decide the maximum number of posts to be shown.



By clicking the post previewed-content, you will go to that post in the forum.

- **Top Voted Topics gadget settings:**

1. Click  in the **Title** bar to open the form to edit the gadget settings.



2. Select the maximum number of topics to be displayed in the **Maximum to display** drop-down list, then click **Save** to accept your changes.

**Forum Statistics**

The **Forum Statistics** gadget displays statistics about the forum's activity. This gadget is especially useful for administrators who always need global as well as detailed view about how the forum is going on. Based on these statistics, the administrators can find the solution to increase the forum activities.



The statistics include the total number of the topics, posts, members, active members and the maximum number of online users.

You can switch between different views:

- **Global statistics view:** This is the default view.

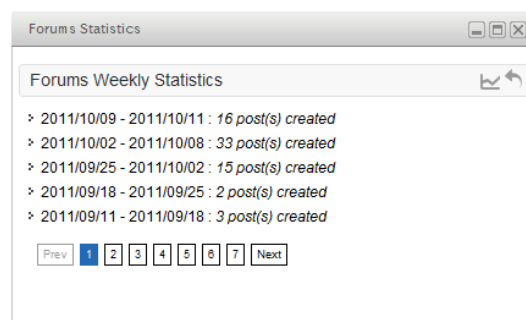


- **Weekly statistics view:**

- Click  to switch to the **Weekly statistics** view.
- Click  to back to the **Global statistics** view.

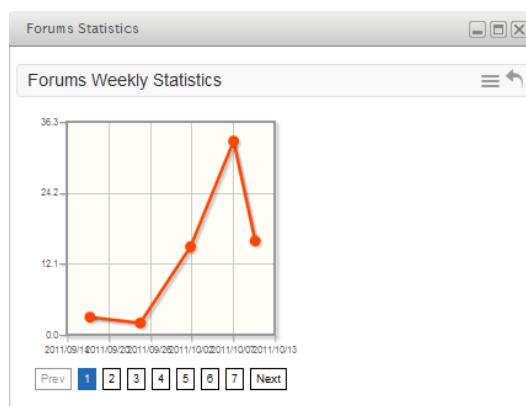
After switching to the **Weekly statistics** view, you can display the statistics in a list or a chart.


#### List view



- Click  to switch to the **Chart** view.

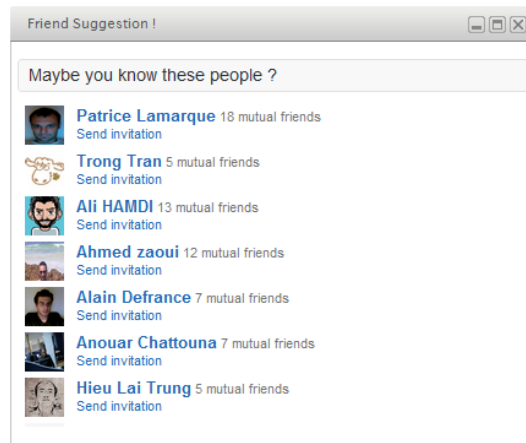
#### Chart view



- Click  to go back to the **List** view.

### Friend Suggestions

The **Friend Suggestions** gadget will suggest you to connect with people that have mutual friends with you.



To send the invitation to connect with the suggested people right on this gadget, simply click **Send invitation** under their usernames.

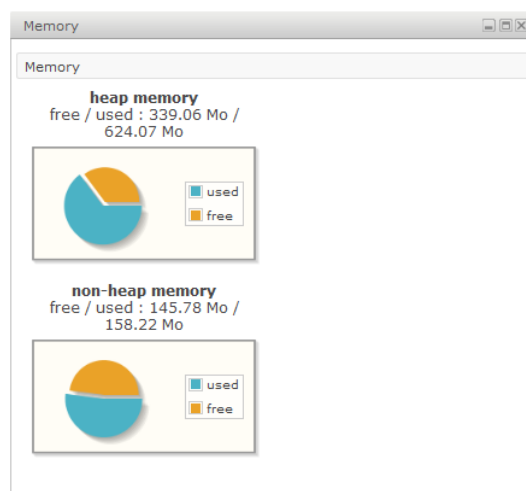
### 7.6.2.2. Management and Monitoring Gadgets

The **Management and Monitoring** gadgets include gadgets designed for providing the overall vision of the system. These gadgets monitor the system and provide the current system performance statistics which are especially useful for the system administrators and developers.

eXo Platform provides 7 types of **Management and Monitoring** gadget as follows:

#### Memory Charts

The **Memory Charts** gadget provides the chart of memory used during runtime.



The chart shows:

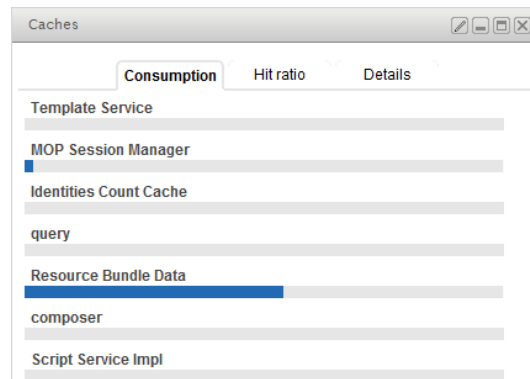
- The ratio between free and used heap memory.
- The ratio between free and used non-heap memory.

#### Cache Levels

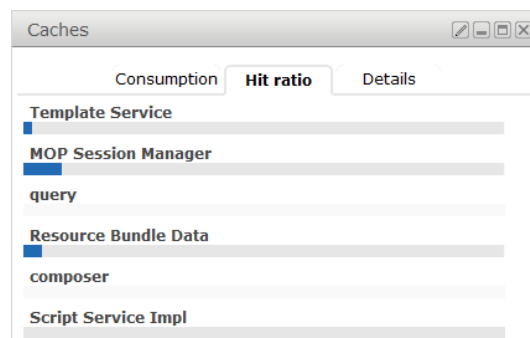
The **Cache Levels** gadget displays the eXo cache levels and settings. Based on these statistics, the administrators can configure the cache settings properly to get better performance:

- If the cache is full but the hit ratio is low (or missed ratio is high), it means the cache is full of unnecessary data. It should be cleared and/or its size is increased, or its lifetime is decreased.
- If the cache is full and the hit ratio is high, this is good. It means most data are retrieved from the cache not the database, so the system gets better performances.

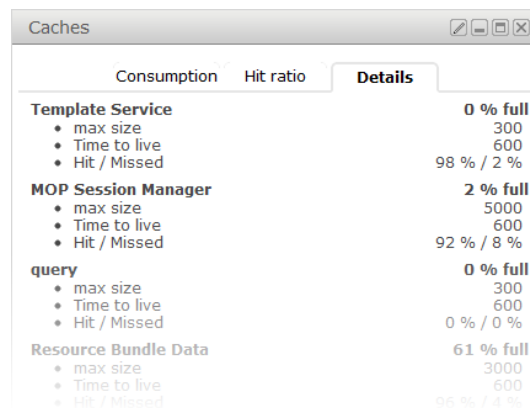
- If the cache is empty, it should be configured differently, for example, increasing its lifetime.



- The **Consumption** tab shows the overall cache consumption in the system.
- The **Hit ratio** tab shows the ratio between requested data fetched from cache and data fetched from database.



The **Details** tab shows the cache level and the current cache settings.

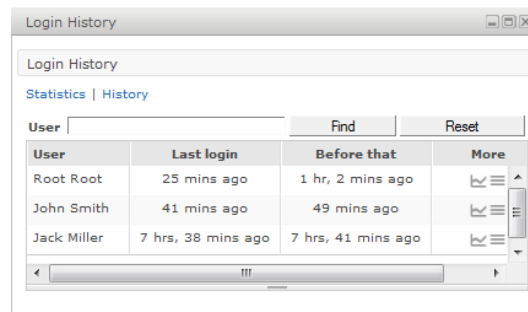


In which:

- **Max size:** The maximum size of the cache.
- **Time to live:** The lifetime (in seconds) of cache entries before being cleared.
- **Hit/Missed:** The percentage of data fetched from cache versus the percentage of data fetched from database.

### Applications Statistics

The **Application Statistics** gadget displays how fast applications are. It shows administrators and developers which applications should be optimized.



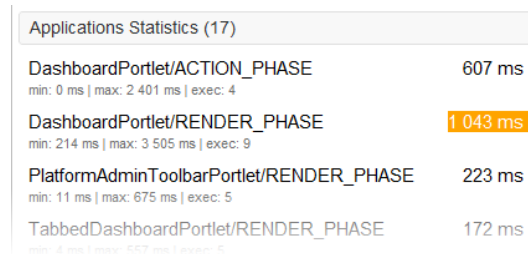
Login History

Statistics | History

User  Find Reset

User	Last login	Before that	More
Root Root	25 mins ago	1 hr, 2 mins ago	
John Smith	41 mins ago	49 mins ago	
Jack Miller	7 hrs, 38 mins ago	7 hrs, 41 mins ago	

Applications that take long time to execute will be highlighted so that you can easily recognize.



Applications Statistics (17)

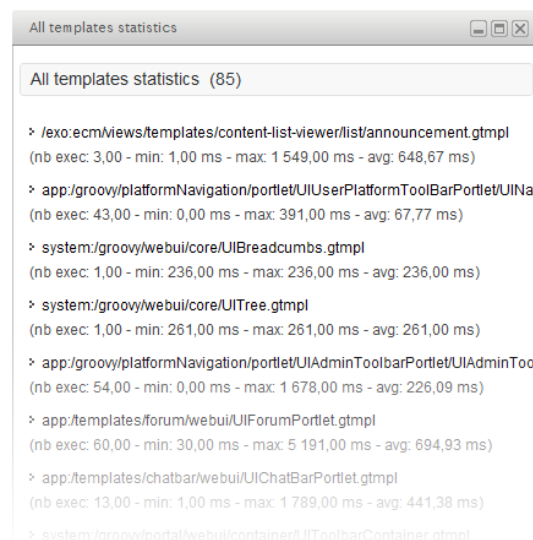
DashboardPortlet/ACTION_PHASE	607 ms
min: 0 ms   max: 2 401 ms   exec: 4	
DashboardPortlet/RENDER_PHASE	1 043 ms
min: 214 ms   max: 3 505 ms   exec: 9	
PlatformAdminToolBarPortlet/RENDER_PHASE	223 ms
min: 11 ms   max: 675 ms   exec: 5	
TabbedDashboardPortlet/RENDER_PHASE	172 ms
min: 4 ms   max: 557 ms   exec: 5	

Each application is provided with these statistics:

- The number of executions (exec).
- The minimum execution time (min).
- The maximum execution time (max).

### All Template Statistics

The **All Template Statistics** gadget displays how fast templates are. It shows administrators and developers which templates should be optimized.



All templates statistics (85)

> /exo:ecm/views/templates/content-list-viewer/list/announcement.gtmpl (nb exec: 3,00 - min: 1,00 ms - max: 1 549,00 ms - avg: 648,67 ms)	
> app:/groovy/platformNavigation/portlet/UIUserPlatformToolBarPortlet/UINa (nb exec: 43,00 - min: 0,00 ms - max: 391,00 ms - avg: 67,77 ms)	
> system:/groovy/webui/core/UIBreadcrumbs.gtmpl (nb exec: 1,00 - min: 236,00 ms - max: 236,00 ms - avg: 236,00 ms)	
> system:/groovy/webui/core/UITree.gtmpl (nb exec: 1,00 - min: 261,00 ms - max: 261,00 ms - avg: 261,00 ms)	
> app:/groovy/platformNavigation/portlet/UIAdminToolBarPortlet/UIAdminToo (nb exec: 54,00 - min: 0,00 ms - max: 1 678,00 ms - avg: 226,09 ms)	
> app:/templates/forum/webui/UIForumPortlet.gtmpl (nb exec: 60,00 - min: 30,00 ms - max: 5 191,00 ms - avg: 694,93 ms)	
> app:/templates/chatbar/webui/UIChatBarPortlet.gtmpl (nb exec: 13,00 - min: 1,00 ms - max: 1 789,00 ms - avg: 441,38 ms)	
> system:/groovy/portal/webui/container/UIToolbarContainer.gtmpl	

Each template is provided with these statistics:

- The number of executions (nb exec).
- The minimum execution time (min).
- The maximum execution time (max).
- The average execution time (avg).

### 10 Slowest Templates

The **10 Slowest Templates** gadget displays the 10 slowest groovy templates and their speed statistics. It helps administrators and developers specify what templates are slowing down the system performance most.

10 slowest templates

- system:/groovy/portal/webui/workspace/UIPortalApplicationChildren.gtmpl  
(nb exec: 59,00 - min: 11,00 ms - max: 163 670,00 ms - avg: 14 406,86 ms)
- system:/groovy/portal/webui/workspace/UIWorkingWorkspace.gtmpl  
(nb exec: 60,00 - min: 10,00 ms - max: 158 100,00 ms - avg: 13 630,98 ms)
- system:/groovy/portal/webui/page/UISiteBody.gtmpl  
(nb exec: 60,00 - min: 10,00 ms - max: 132 808,00 ms - avg: 8 030,27 ms)
- system:/groovy/portal/webui/portal/UIPortal.gtmpl  
(nb exec: 60,00 - min: 9,00 ms - max: 132 315,00 ms - avg: 7 921,58 ms)
- system:/groovy/portal/webui/page/UIPageBody.gtmpl  
(nb exec: 60,00 - min: 9,00 ms - max: 131 168,00 ms - avg: 5 746,72 ms)
- system:/groovy/portal/webui/page/UIPage.gtmpl  
(nb exec: 60,00 - min: 9,00 ms - max: 130 864,00 ms - avg: 5 652,62 ms)
- app:/groovy/dashboard/webui/component/UIDashboardPortlet.gtmpl  
(nb exec: 41,00 - min: 282,00 ms - max: 66 989,00 ms - avg: 3 840,34 ms)
- classpath:/groovy/dashboard/webui/component/UIDashboard.gtmpl  
(nb exec: 41,00 - min: 282,00 ms - max: 66 989,00 ms - avg: 3 744,98 ms)

Similar to the **All Template Statistics** gadget, each template is provided with these statistics:

- The number of executions (nb exec).
- The minimum execution time (min).
- The maximum execution time (max).
- The average execution time (avg).

## Services Management


The **Services Management** gadget provides an easy access to REST management API.

The screenshot shows the 'Services Management' console. At the top, there's a 'Services' dropdown menu with 'portalstatistic' selected. A red arrow points to this dropdown with the text 'Select a service'. Below this is a 'Method' dropdown menu with 'getThroughput' selected. A red arrow points to this dropdown with the text 'The respective method'. The main area contains a table with the following data:


Name	Value
Name	getThroughput
Description	The number of request per second of a specified portal
Method	get
Parameters	portalid

Below the table is a 'Properties' section with a dropdown menu showing 'PortalList'. A red arrow points to this dropdown with the text 'The respective properties'. Below this is another table with the following data:

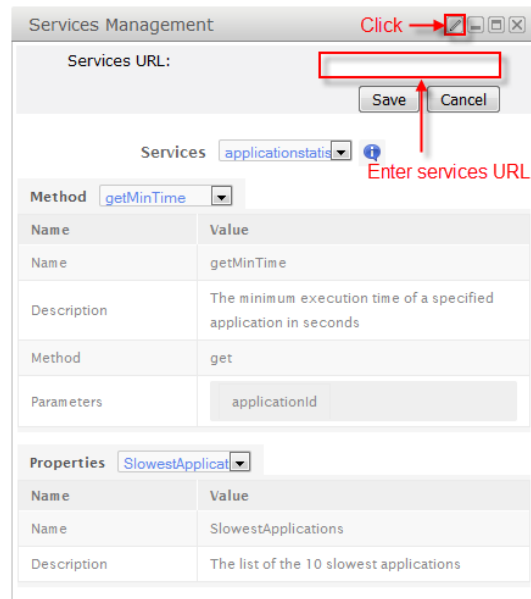
Name	Value
Name	PortalList
Description	The list of identifier of the known portals

- Select the service from the **Services** drop-down list. For each selected service, its respective methods and properties are shown.
- Click  to get the description of the selected service.
- **Manage a remote service on another Platform settings:**



1. Click  in the **Title** bar.

The form to edit the gadget settings appears.



Services Management

Services URL:

Save Cancel

Services **applicationstatus**

Method **getMinTime**

Name	Value
Name	getMinTime
Description	The minimum execution time of a specified application in seconds
Method	get
Parameters	applicationId

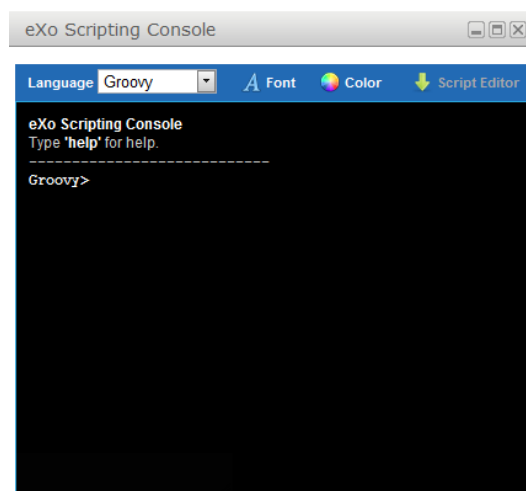
Properties **SlowestApplica**

Name	Value
Name	SlowestApplications
Description	The list of the 10 slowest applications

2. Enter the link to the service in the **Services URL** field, then click **Save** to accept your changes.

### eXo Scripting Console

The **eXo Scripting Console** gadget provides a Groovy console that developers can use to interact with the runtime. This gadget is useful when you want to experiment on code. It accepts eXo API and can access eXo components deployed in the portal container, so this can be used as a tool for drafting code, testing or exploring eXo API/components/data interactively on a live system. The eXo Scripting Console gadget is better viewed on the entire screen. You should configure an entire page or a Dashboard tab for it.



- Click **Font** to change the font size.
- Click **color** to change the font color.
- Click **help** to view the Groovy Console Help.

### 7.6.2.3. Audit & Collab gadgets

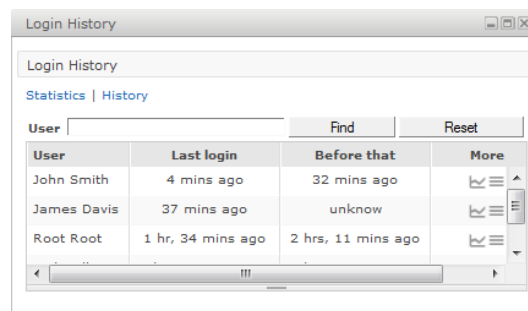
eXo Platform currently provides:

- One type of **Audit** gadget that is named [Login History \[464\]](#).

- One type of **Collab** gadget that is named **eXo Calendar Gadget** [464]

## Login History

Under the group of Audit gadgets, **Login History** records user login history and provides statistics.



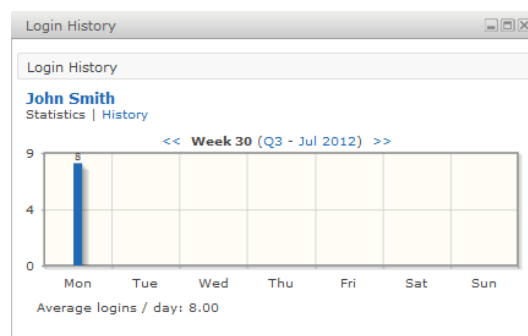
The screenshot shows the 'Login History' window with a search bar and 'Find'/'Reset' buttons. Below is a table with columns: User, Last login, Before that, and More. The table lists three users: John Smith, James Davis, and Root Root.

User	Last login	Before that	More
John Smith	4 mins ago	32 mins ago	[icon]
James Davis	37 mins ago	unknown	[icon]
Root Root	1 hr, 34 mins ago	2 hrs, 11 mins ago	[icon]

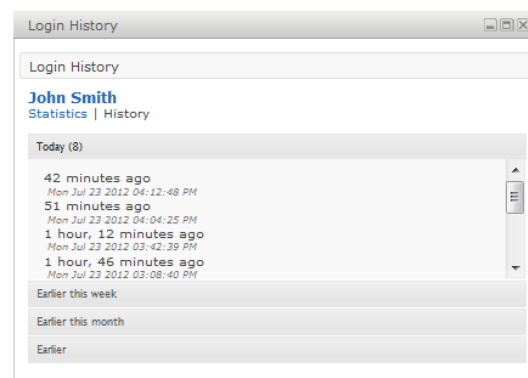
You can look up a specific user by entering his username in the **User** field and click **Find**.

Click **Reset** to clear the **User** field and return the default list of users who have signed in.

- Click the **Statistics** and **History** links to view the global statistics and global history respectively.
- Click [icon] corresponding to the user to view his login statistics.



- Click [icon] corresponding to the user to view his login history.



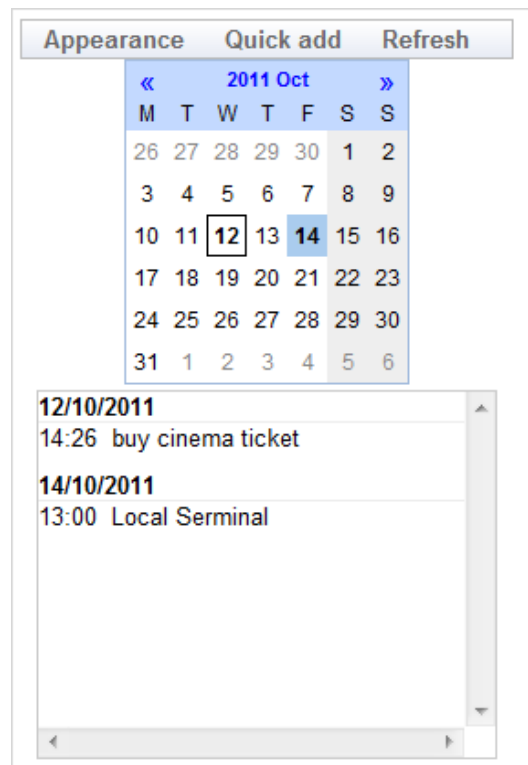
The screenshot shows the 'Login History' window with 'John Smith' selected. It displays a list of login events under the heading 'Today (8)'. Each entry includes a time relative to 'now' and a specific timestamp.

Time	Timestamp
42 minutes ago	Mon Jul 23 2012 04:12:48 PM
51 minutes ago	Mon Jul 23 2012 04:04:25 PM
1 hour, 12 minutes ago	Mon Jul 23 2012 03:42:39 PM
1 hour, 46 minutes ago	Mon Jul 23 2012 03:08:40 PM

Below the list, there are links to view history for 'Earlier this week', 'Earlier this month', and 'Earlier'.

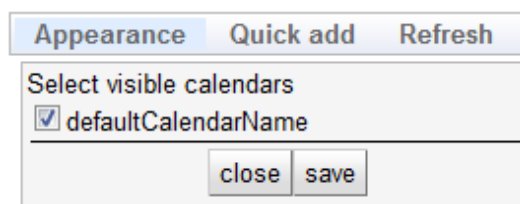
## eXo Calendar Gadget

Under the group of **Collab** gadgets which are designed for collaborative activities, the **eXo Calendar** gadget displays a mini calendar and allows you to quickly add an event.



There are three tabs in this gadget, including **Appearance**, **Quick add**, and **Refresh**.

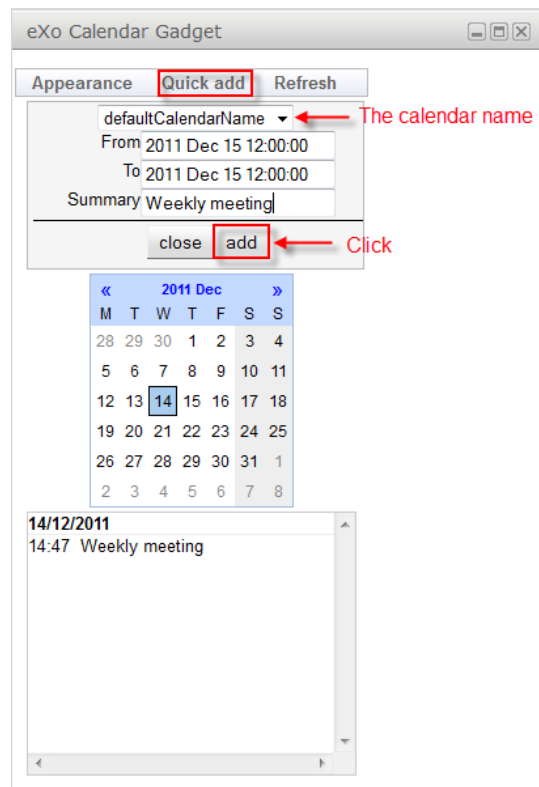
- **Appearance:**



If you have more than one personal calendar, you can select which calendar to display. Select the calendars from the list, then click **save**. Only the event in the calendar of your choice will be displayed.

- **Quick add:**

You can add a new event to your personal calendar in this gadget by simply entering the date, time and description, then selecting **add**.



#### 7.6.2.4. Intranet gadgets

Intranet gadgets are ones which come with the [Intranet homepage](#), including:

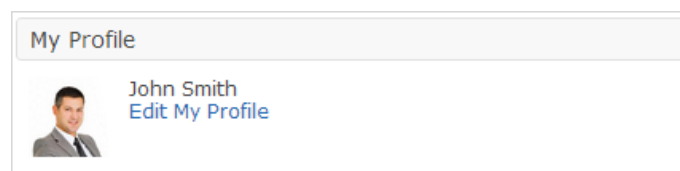
- [My Profile gadget \[466\]](#)
- [My Invitations gadget \[466\]](#)
- [My Agenda gadget](#)
- [Featured Poll gadget \[467\]](#)
- [Who is online? gadget \[468\]](#)
- [Bookmarks gadget \[469\]](#)
- [Favorite Documents gadget \[469\]](#)



#### Note

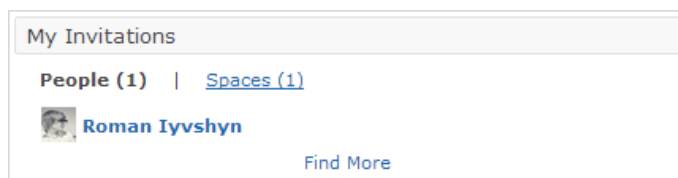
Intranet gadgets only work in the Intranet context.

#### My Profile



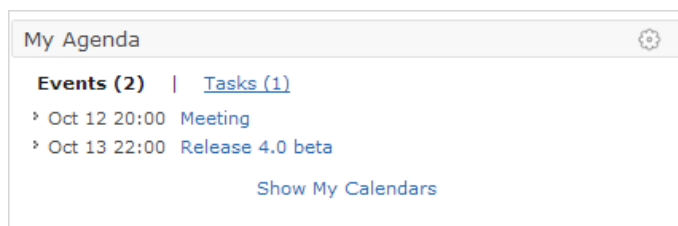
**My Profile** gadget provides a quick access to your profile page where you can update your profile information.

#### My Invitations



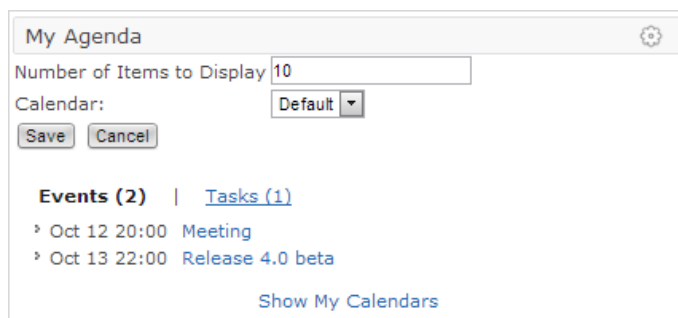
**My Invitations** gadget displays number of invitations from people or spaces. You can click the **People/Space** to view invitations from people/space or you can click **Find more** to open the **My Connections** page and view all the requests received.

### My Agenda



**My Agenda** gadget displays the upcoming events and tasks created in your calendars.

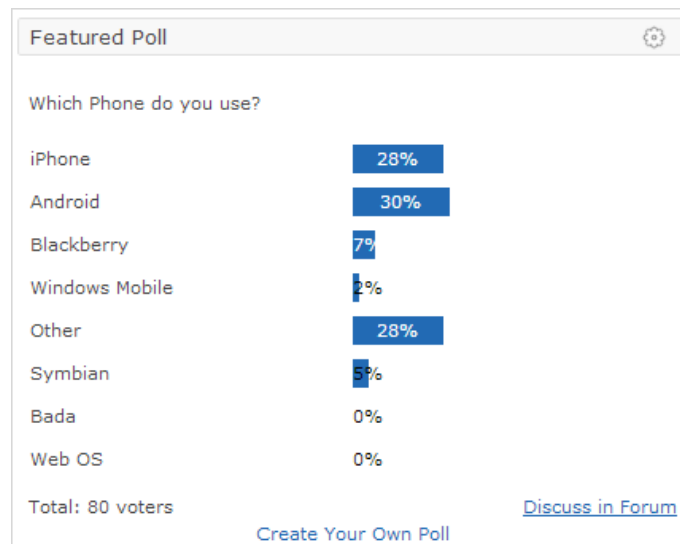
- To change the **My Agenda** settings, click .




Here, you can:

Field	Description
<b>Number of Items to Display</b>	Set the maximum number of tasks and events to be displayed.
<b>Calendar</b>	Choose the calendar that you want to show tasks and events.
<b>Save/Cancel</b>	Save/Discard changes.
<b>Show My Calendars</b>	Show your calendars in the <b>Calendar</b> application.

### Featured Poll



**Featured Poll** gadget displays the poll created in the **Forum** or **Poll** application that you have permission to vote. You can directly vote and see results on the gadget. This gadget also provides links to create your own poll or discuss about the poll topic in the Forum.

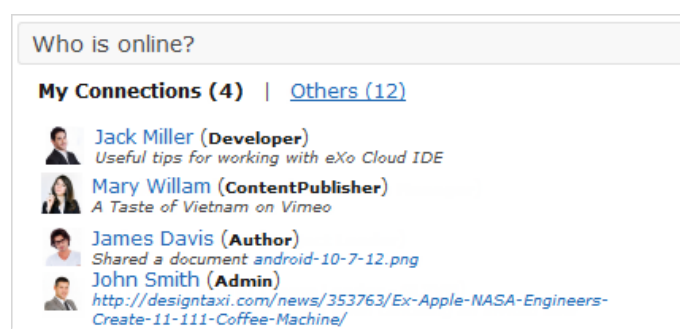
- **Vote for a specific poll:** Normally, the latest poll will be displayed on this gadget. However, you can indicate another poll to vote by clicking , then choose one from the drop-down list.



Here, you can:

Field	Description
<b>Vote/Vote Again</b>	Vote for option(s)/ Change your vote (appeared when the option "Change your vote" is enabled).
<b>Create Your Own Poll</b>	Create a new poll in the <b>Forum</b> application.
<b>Discuss in Forum</b>	Go to the topic in the <b>Forum</b> application.

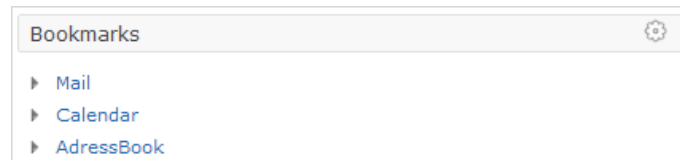
### Who is online?




**Who is online?** gadget displays people that are currently connected to the Intranet.

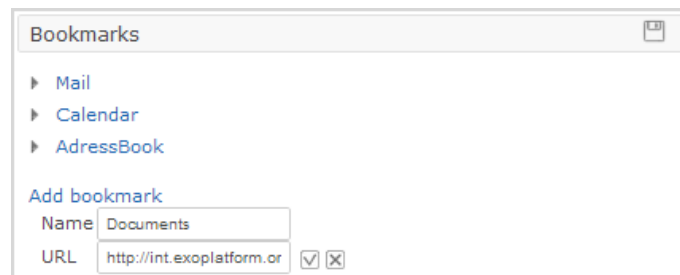
Fields	Description
<b>My Connections</b>	Display social connections and their avatars, full names and excerpt of their last posted status. Clicking the link on a name will lead to the profile of that person.
<b>Others</b>	Display names of other people who are not in social connections. Only their names are displayed. Clicking the link on a name will lead to the profile of that person.

## Bookmarks




**Bookmarks** gadget is a simple link management gadget which displays your quick links. You can add or remove any links.

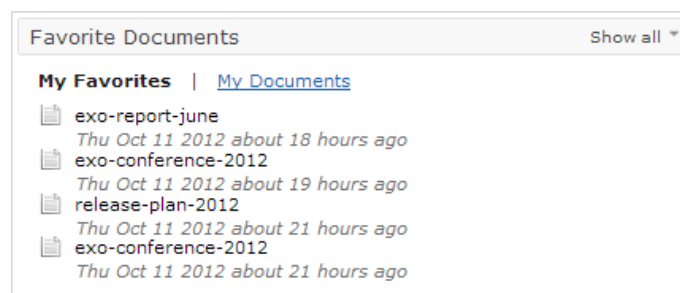
- To change the Bookmarks gadget settings, click .



Here, you can:

Field	Description
<b>Add bookmark</b>	Add a new bookmark.
<b>Name</b>	The bookmark name. For example: "Documents".
<b>URL</b>	The bookmark link. For example: "http://int.exoplatform.org/portal/intranet/documents".
<input checked="" type="checkbox"/> <input type="checkbox"/>	Accept/Delete changes.
	Save gadget settings.

## Favorite Documents

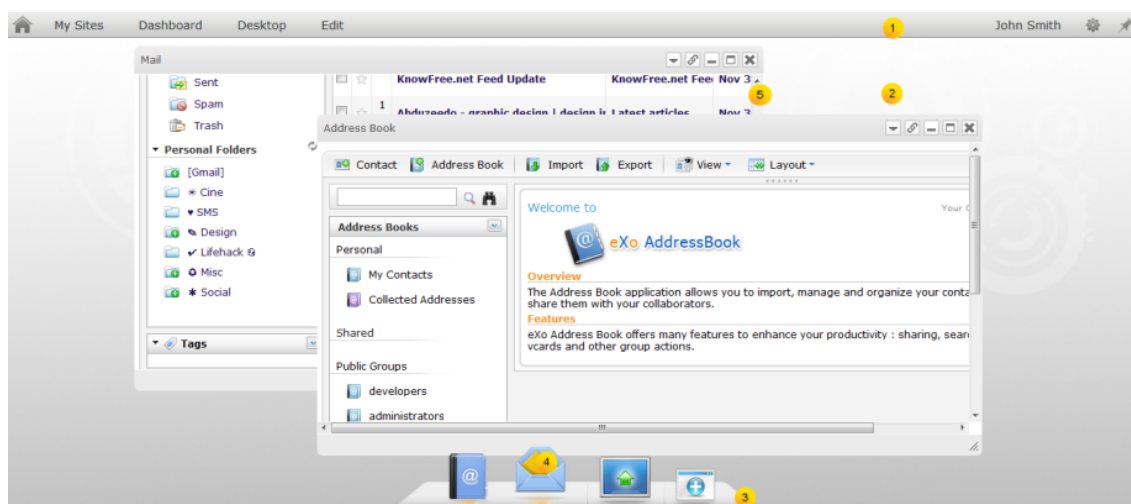


**Favorite Documents** gadget lists your favorite documents in the **Sites Explorer** so you can quickly access them.

Field	Description
<b>My Favorites</b>	Show a list of favorite documents by created date.
<b>My Documents</b>	Show a list of your document by created date.
<b>Show all</b>	Show all your favorite documents in <b>Sites Explorer</b> .

### 7.6.3. Inside Desktop

To go into the **Desktop** application, simply click **Desktop** on the **Administration** bar. You will be directed to the Desktop user interface as below:



Number	Meaning
1	The administration bar which allows you to access and manage tasks quickly.
2	The background of Desktop.
3	The Dockbar which provides easy access to applications via icons.
4	The application icons which are used as shortcuts to gadgets, applications or pages.
5	The application.

In the Desktop, you can do the following actions:

- [Add an application to the Dockbar](#)
- [Open an application](#)
- [Get a permanent link](#)
- [Quit an application](#)
- [Change the Desktop title and background](#)

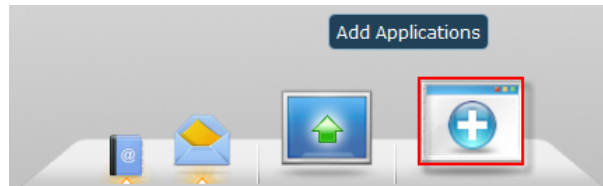
#### 7.6.3.1. Add an application

1. Open the **Add Application** form via one of two ways:

##### The first way

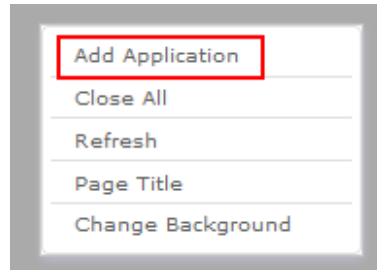
Hover your cursor over the Dockbar and click the **Add Application** icon.



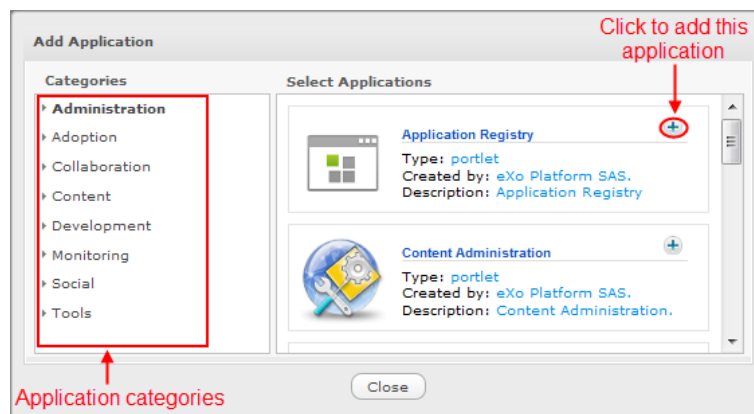


### The second way

Right-click any area inside the Desktop background and select **Add Application** from the drop-down menu.



The **Add Application** form will appear.

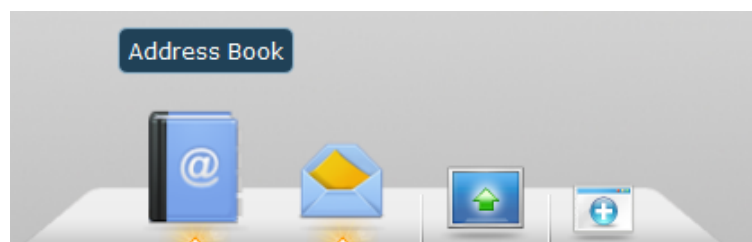



2. Select a category on the left pane. The applications of this category will be shown on the right pane.

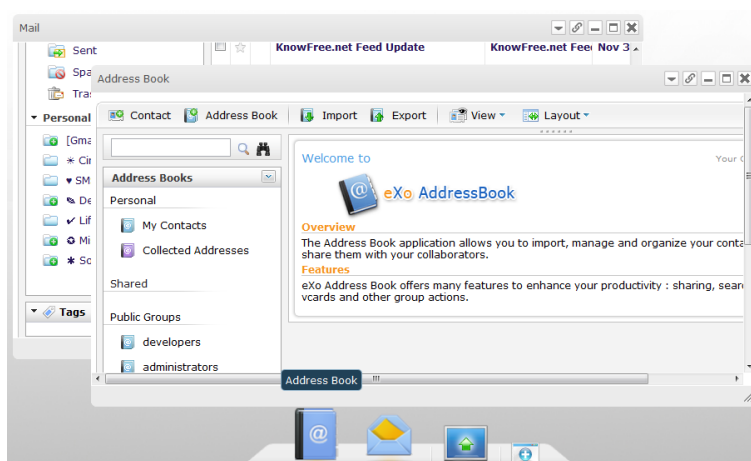
3. Click  corresponding to your desired application. Your selected application is then automatically added to the Dockbar.







### 7.6.3.2. Open an application

- To open an application, hover your cursor over the Dockbar and click your desired application icon. The hovered icon will display the application name, allowing you to recognize your desired application easily.



The application window will be shown on the Desktop. When an application is running,  will appear right under its icon on the Dockbar to indicate that application is running.




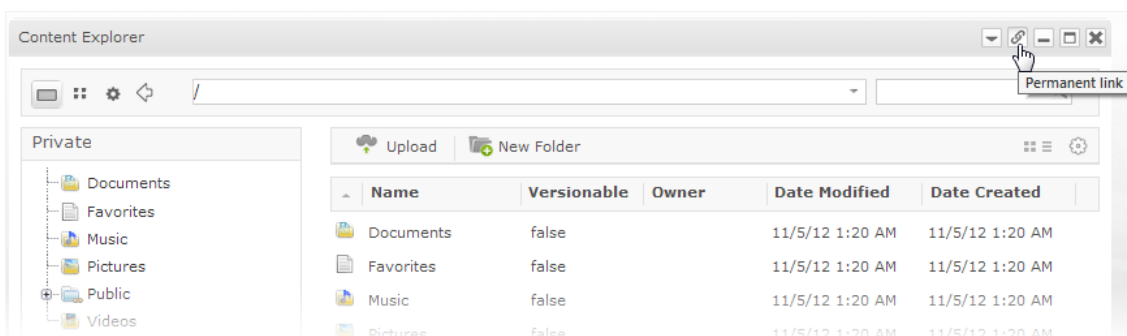
- To minimize the running application window, click  on the info bar of the application or  on the Dockbar.  is remained, stating that the application is still running.
- To show the running application window, click  or the application icon on the Dockbar.
- To maximize the opened application window, click  on the info bar of the application to view its full size.  will be changed into . Click  if you want to restore to the original size of the application.
- To reset a changed application, right-click any area outside the application window and select **Refresh**.

### 7.6.3.3. Get a permanent link

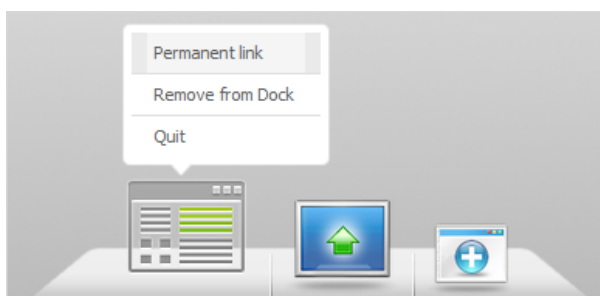
Each application added inside Desktop has a permanent link which is very useful for your bookmark.

#### Get the application's permanent link

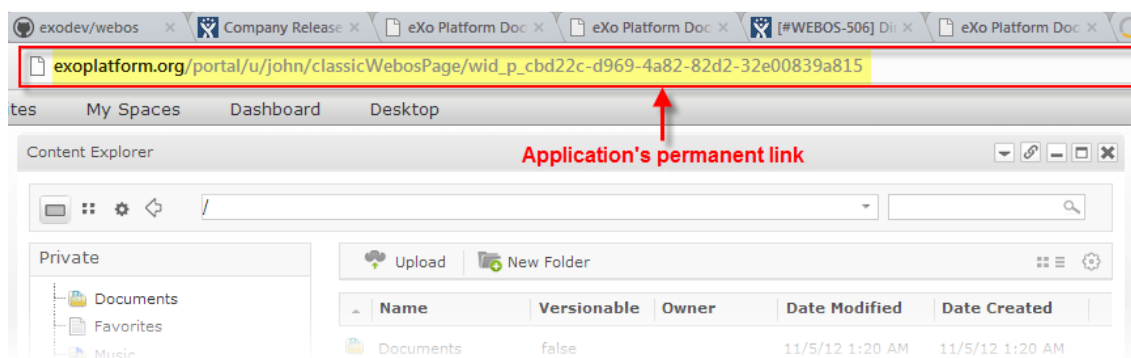
1. Add the application that you want to get the permanent link to Desktop, for example **Content Explorer**.
2. Click  on the application's info bar;



Or, right-click the application icon on the Dockbar and select **Permanent link**:



The permanent link of **Content Explorer** will be generated on your web browser's address bar.



Now, you can bookmark and use this link later to directly access the application without browsing and selecting it again.




#### Note

You are required to have logged in before being directed to the link's application.

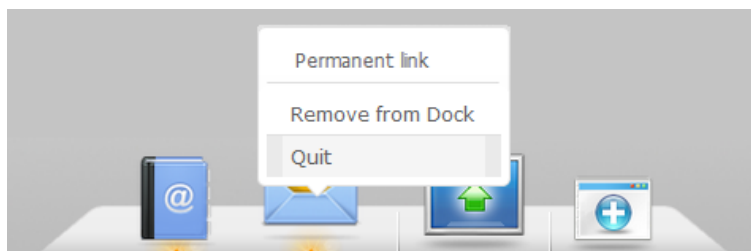
### 7.6.3.4. Quit an application

#### The first way

Click  at the right top of the application window.

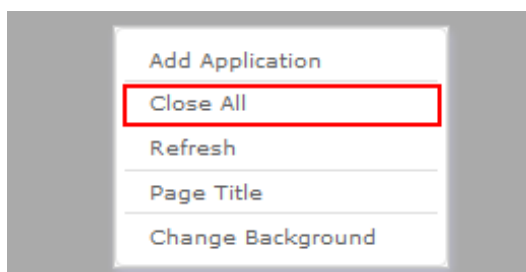
#### The second way


Right-click the application icon on the Dockbar and select **Quit**.



#### The third way

This way allows you to close all running applications. Right-click any empty area on the desktop page and select **Close All** from the drop-down menu.



The icon  will disappear after the running application has been closed.

### 7.6.3.5. Change the Desktop title and background

First, right-click any area on the Desktop background.

#### Change the title

1. Select **Page Title** from the drop-down menu.
2. Enter your desired new name into the **Page title** field, and click **Save** to accept your change.

### Change the background

1. Select **Change Background** from the drop-down menu.

All available images for the Desktop background are displayed in the **Choose Background Image** form.

File Name	Action
background_0.jpg	
background_1.jpg	
background_2.jpg	
background_3.jpg	
background_4.jpg	
background_5.jpg	
background_6.jpg	
background_7.jpg	

Get Default

Upload Close

2. Click to preview your background.
3. Click to select and apply the relevant background.
  - To get the default background again, click the **Get Default** link at the right corner of this form.
  - Also, from this form, you can do the following actions:

### Delete any background

Click corresponding to the background you want to delete.

### Upload an image from your local device

1. Click the **Upload** button at the bottom of the **Choose Background Image** form. The **Upload Images** form will appear.

Upload Images

Browse... Click

+

Save Back

2. Click **Browse...** to locate the image you want to set as background image and upload it.

After the image is uploaded, you can click to add more another image, or to delete the uploaded image.

Upload Images

5.jpg Add more images

Save Back

3. Click **Save** to accept your upload, or **Back** to go back to the previous step.

