

eXo Knowledge User Guide

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eXo Platform

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Overview Of eXo Knowledge

1.1. About eXo Knowledge

1.1.1. What is eXo Knowledge?

eXo Knowledge is one of eXo Platform applications. This is a suite of applications, which contains everything you need for the knowledge management. eXo Knowledge is made up of three main portlets: Forum, Answers and Wiki where you can share information, seek supports through helpful answers and post your ideas.

Answers and FAQ

Answers 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. FAQ takes this content as input and publish it in a clean and quickly browsable manner. You can point a FAQ portlet to one or several Answers categories. As a publishing portlet, it is impossible to edit questions and answers in FAQ.

Forum

Forum 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.

Wiki

Wiki is an enterprise wiki application focused on content productivity for portal users as a tool to forge the unstructured knowledge. Wiki allows you to create and edit pages by using a simplified markup language or a WYSIWYG editor. With this application, 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 other eXo Knowledge applications, such as Answers and Forum will complete the ideal combination that helps users enhance their experiences on collaboration activities and build valuable knowledge center for clients.

1.1.1.1. About this document

This guide aims at instructing users to use eXo Knowledge features through in-depth examples and explanations. This guide is for all regular users and advanced users who have the administration and moderation privileges.

This user guide is divided into four main parts:

Chapters	Main content
Overview Of eXo Knowledge	Introduction to eXo Knowledge and user roles in different groups, the ways to access various applications of eXo Knowledge.
How To Use Answers?	Actions in the Answers application, such as submitting, commenting or answering a question and more.
How To Use Forum?	Actions in the Forum application, related to topics, posts, bookmarks and more.
How To Use Wiki?	Introduction to Wiki, such as page hierarchy, syntaxes and how to work with pages, attachments and more.

For each section describing specific functions of an application, instructions are arranged to the user groups: actions performed by regular users, those by moderators and administrators and the administration actions for the administrators only.

1.1.1.2. References

Information

- [eXo Homepage](#)
- [eXo Wiki](#)

Support

- [Forums](#)
- [Support/Training/Consulting services](#)

Download

- [eXo Content](#)
- [eXo Development tools](#)
- [GateIn Portal Framework](#)
- [eXo Collaboration](#)
- [eXo Knowledge](#)
- [eXo Social](#)

Resource Center

- [Video demos, tutorials, webinar archives, features & benefits tables more.](#)

1.2. Get started with eXo Knowledge

1.2.1. User roles

In eXo Knowledge, user groups may have different privileges to perform actions. Some actions can be limited to some specific user groups. eXo Knowledge uses a concept of User group, which is designed to give the advanced users the ability to control and assign what functions or features that other users can and cannot do within the application. There are four user groups: administrator, moderator, regular user and guest.

Administrator is an advanced user, who typically has the highest right when using eXo 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 that means he has certain allowed capabilities and may perform these advanced actions in a specific area only. For example, a moderator in 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.

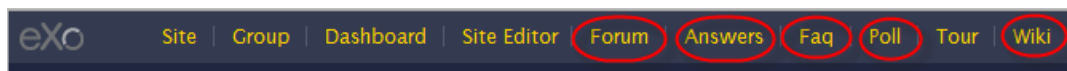
Regular user is defined as a logged-in user who can only use the basic features of eXo Knowledge. The regular user can be promoted to the advanced user by the administrator.

Guest (anonymous user) is an unregistered/unlogged-in user who is often limited to a very few features only of eXo Knowledge. For instance, a guest can view topics in Forum but he cannot reply or create new topics.

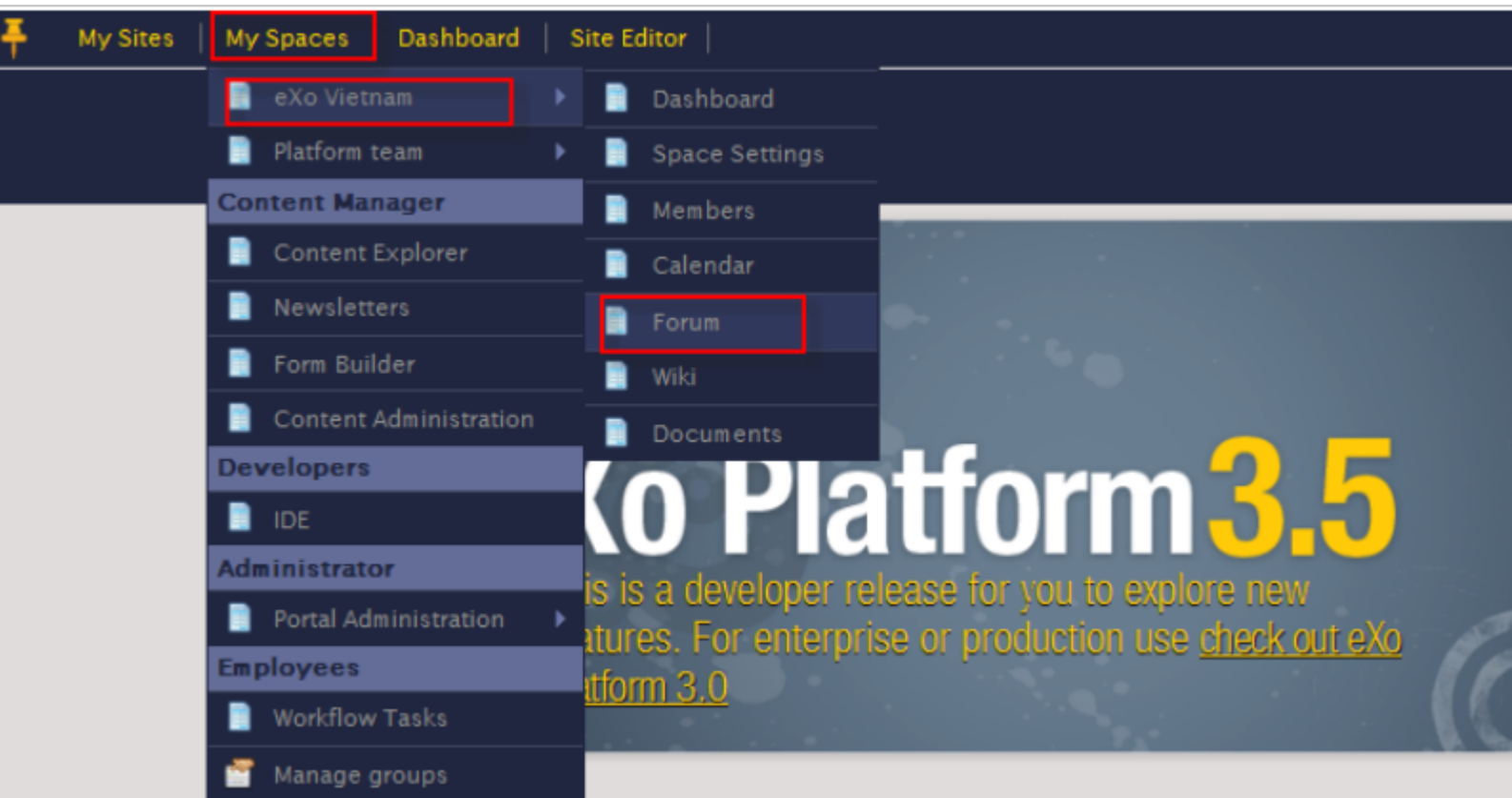
Notice that there will be no section dedicated to this user role. For the actions that an anonymous user can perform, you can refer to the table that summarizes all the actions in each applications.

1.2.2. Access applications of eXo Knowledge

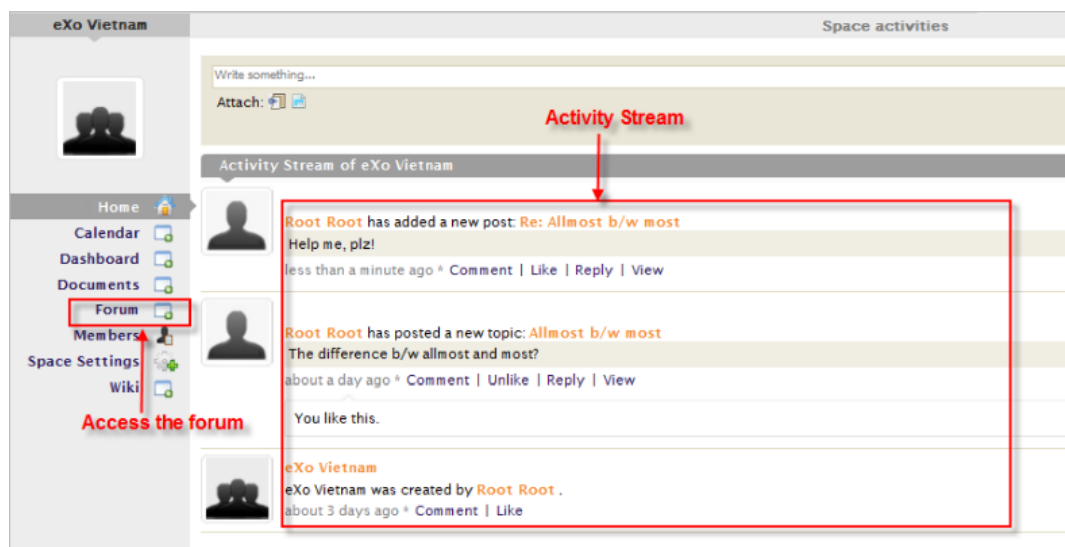
When eXo Knowledge is deployed as standalone, applications are often displayed right on the administration bar. To access it, simply click one specific application name shown as below:



When being integrated into eXo Platform, you should access eXo Knowledge applications, such as Forum, Wiki, through a space by hovering your cursor over **My Spaces**, then clicking the relevant application from the drop-down menu.

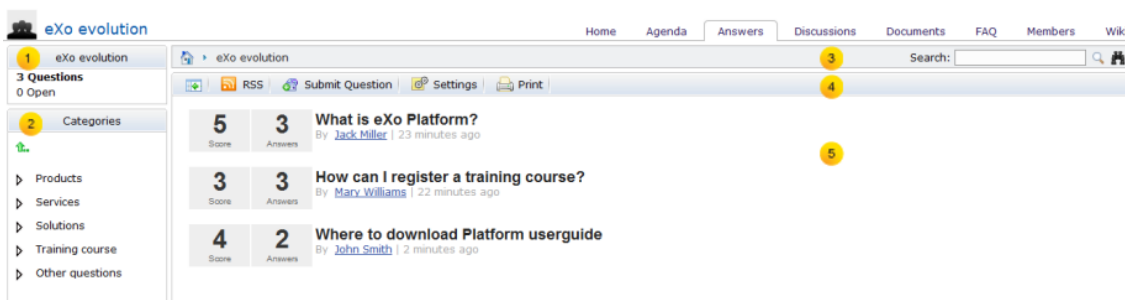


The application page appears, allowing you to do many actions when you directly access the application. Also, when you have any activities in the application, these activities will be added to the Activity Stream of the Space and other members in the space can see them when they access the space as below:



How To Use Answers?

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 Status pane displays information of the currently viewed category, including the total number of open questions, pending questions and the total questions.
2	The Categories 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 Breadcrumb bar is to navigate between categories and sub-categories easily. This bar also includes the search box with simple and advanced options.
4	The Action bar is to add categories, questions, and to manage questions, import, export, print, and do settings.
5	The Answers Viewing 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
View details of the Answers application	See all categories in Answer and their activated questions, details of a question (its content, its answers, uploaded files, image preview).	✓	✓	✓	✓	✓
Download attachments	Download attachments included in	✓	✓	✓	✓	✓

Features		Description	Administrator	Moderator	Owner	User	Guest
		questions or answers.					
Submit question	a	Submit a question with an attachment in multiple languages.	✓	✓	✓	✓	✓
Send question	a	Send a question via email.	✓	✓	✓	✓	✓
Print		Print all questions with their answers of a category and of its sub-categories, or print details of a question.	✓	✓	✓	✓	✓
Search		Simple and advanced searches for a specific category or question.	✓	✓	✓	✓	✓
Watch/Unwatch category	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.	✓	✓	✓	✓	✓
RSS		Subscribe by RSS.	✓	✓	✓	✓	✓
View user profile	user	View the profile of a specific user: questions, answers or comments.	✓	✓	✓	✓	✓
User settings		Define user preferences:	✓	✓	✓	✓	✗

Features	Description	Administrator	Moderator	Owner	User	Guest
	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.	✓	✓	✗	✗	✗
Edit an answer	A question could have multiple answers in multiple	✓	✓	✗	✗	✗

Features	Description	Administrator	Moderator	Owner	User	Guest
	languages that can be edited separately.					
Activate/Deactivate a question	Activate/inactivate a specific question. Inactivated questions are hidden and regular users cannot view.					
Approve/Disapprove a question	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.					
Activate/Deactivate an answer	Set the activated/inactivated status to a specific answer. The inactivated answer is hidden and normal users cannot view the inactivated answer.					
Approve/Disapprove an answer	Approve/disapprove a specific answer. The disapproved answer is also hidden and regular users cannot view.					

Features	Description	Administrator	Moderator	Owner	User	Guest
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.	✓	✗	✗	✗	✗




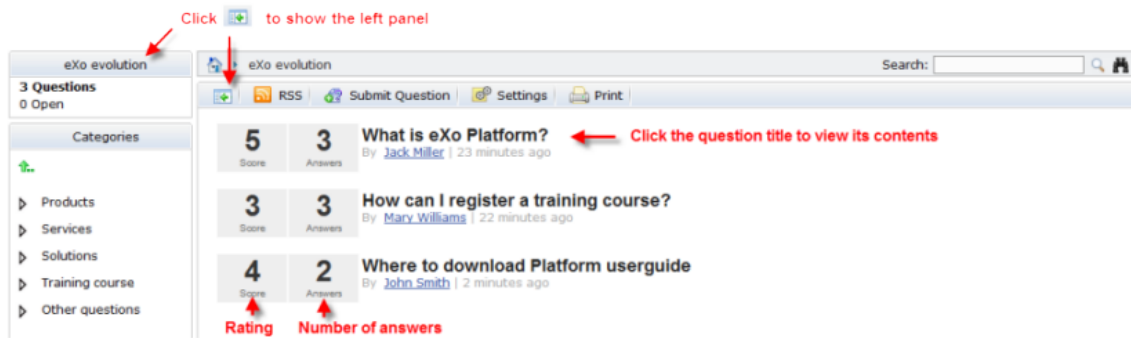
Note

Owners are those posting questions or answers. Actually, they are regular users but can perform some extra actions on their questions or answers.

2.1. Regular user

2.1.1. 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](#)

2.1.2. 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.

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](#)

2.1.3. Edit a question


Regular users can only edit their own questions.

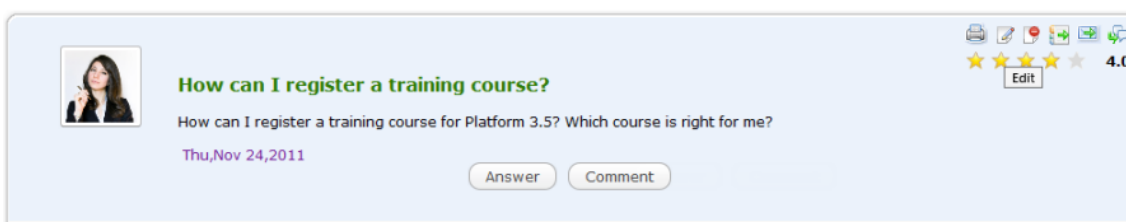
1. Open the **Edit Question** form by following one of these ways:

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](#)

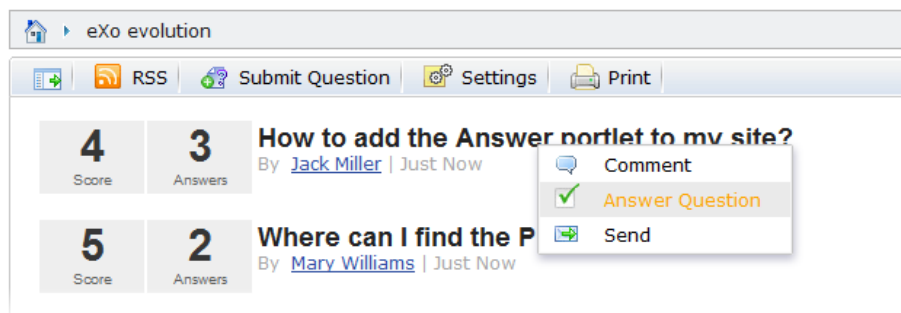
2.1.4. Answer a question

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](#)

2.1.5. 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](#)

2.1.6. 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](#)

2.1.7. 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...
 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](#)


2.1.8. Discuss a question in forum

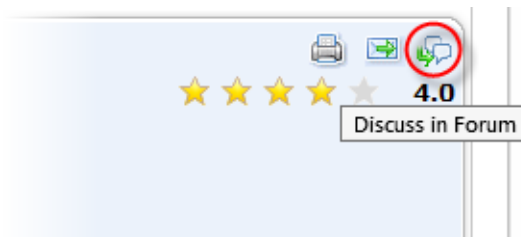
This feature is not enabled by default. Only **Administrators** can activate this feature.

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

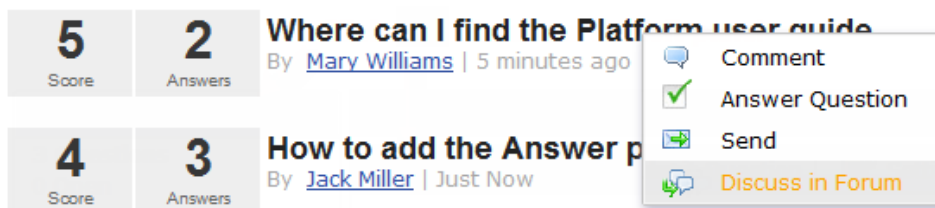
The first way

- Open the question and click  on the top right of the question pane.

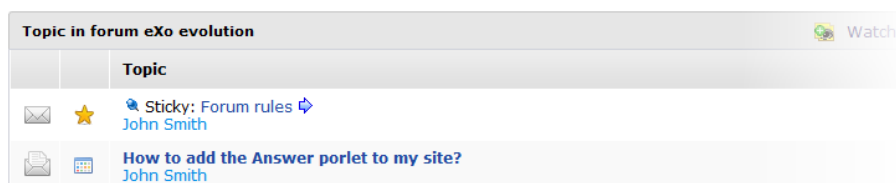


The second way

- 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](#)

2.1.9. 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

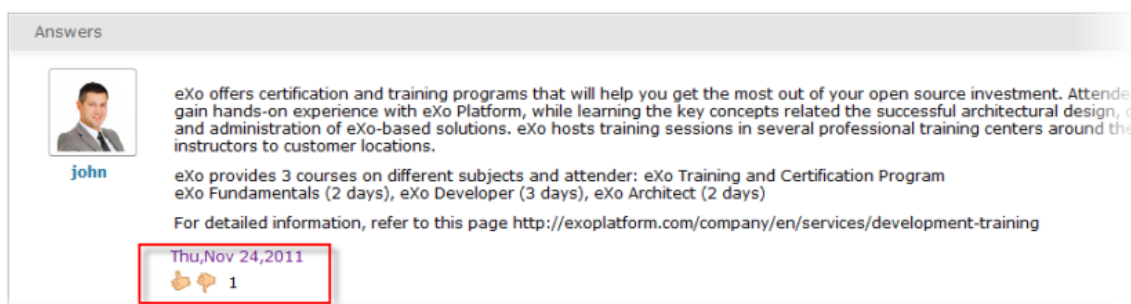
Each user can only rate a question once. Rating is not available to anonymous users.

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](#)

2.1.10. 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.

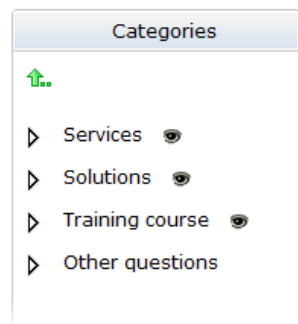
See also

- [View details of Answers](#)
- [Answer a question](#)
- [Edit an answer](#)

2.1.11. 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

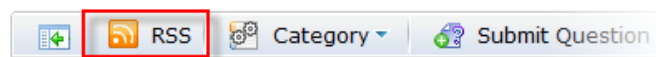
- [View details of Answers](#)

2.1.12. 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](#)

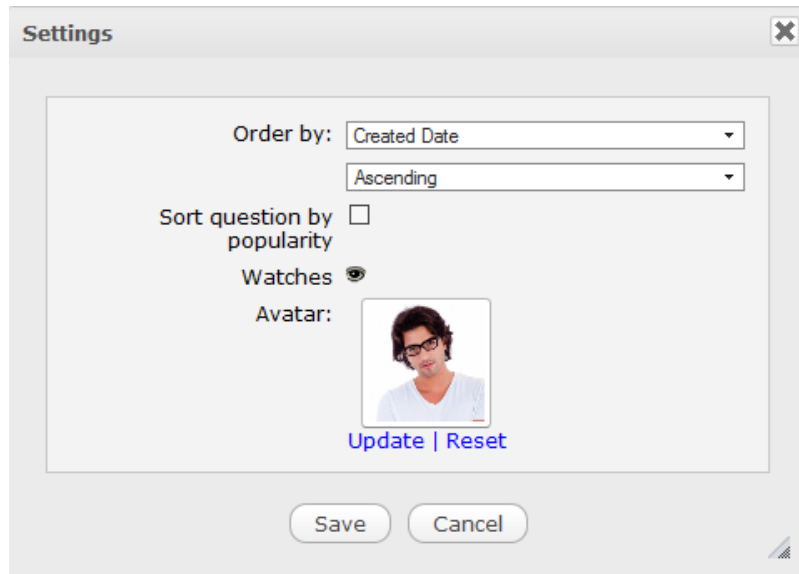
2.1.13. Edit user settings

When going to user settings, you can:

- [Change how Answers will display the entries \[18\]](#)
- [Manage your subscriptions \[18\]](#)
- [Change your avatar \[18\]](#)

Change your user settings

Click  **Settings** on the **Action** bar. The **Settings** form will appear.



The **Settings** form contains the following elements:

- Order by:** A dropdown menu set to **Created Date**.
- Ascending:** A dropdown menu set to **Ascending**.
- Sort question by popularity:** A checkbox that is currently unchecked.
- Watches:** An eye icon.
- Avatar:** A square profile picture of a man with glasses.
- Update | Reset:** A blue link below the avatar.
- Save** and **Cancel** buttons at the bottom.

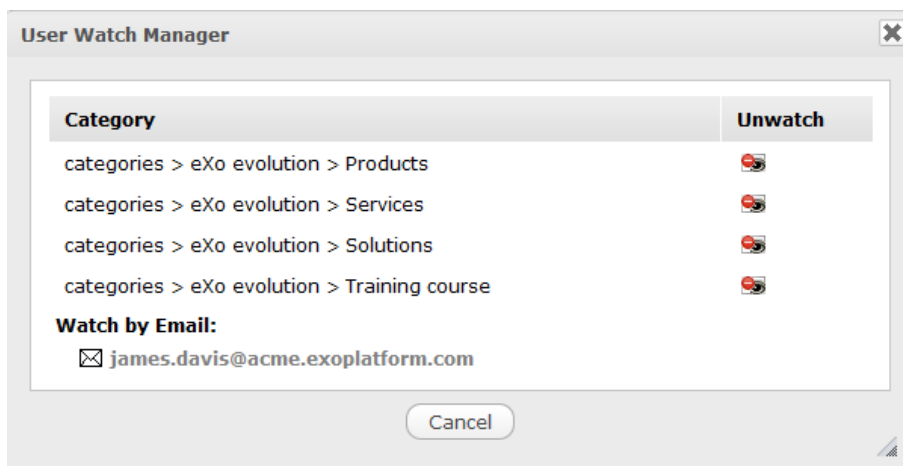
Now you can:

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** form displays a table of watched categories and an email watch section.

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.

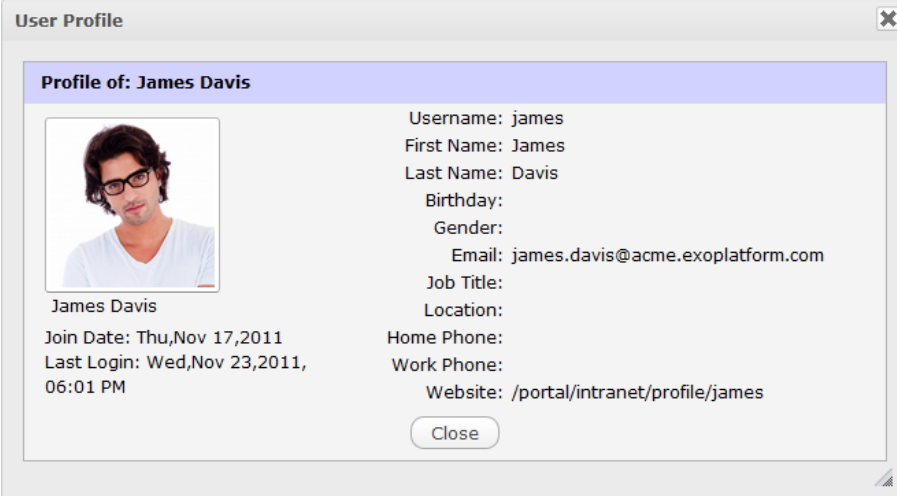
3. Click **Save** to save the changes.

See also

- [View details of Answers](#)

2.1.14. 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.



The image shows a 'User Profile' window for a user named James Davis. The window has a title bar with 'User Profile' and a close button. Inside, there's a header 'Profile of: James Davis'. Below this, on the left, is a profile picture of a man with glasses and a light blue shirt. To the right of the picture, the name 'James Davis' is displayed. Below the name, the 'Join Date' is 'Thu, Nov 17, 2011' and the 'Last Login' is 'Wed, Nov 23, 2011, 06:01 PM'. To the right of the profile picture, a list of user details is shown: 'Username: james', 'First Name: James', 'Last Name: Davis', 'Birthday:', 'Gender:', 'Email: james.davis@acme.exoplatform.com', 'Job Title:', 'Location:', 'Home Phone:', 'Work Phone:', and 'Website: /portal/intranet/profile/james'. At the bottom center of the window is a 'Close' button.

This form shows the selected user's profile, including the join date and the last login time.

See also

- [View details of Answers](#)

2.1.15. Search

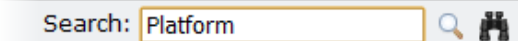
With the **Search** function, you can find your desired item, such as categories, questions, answers, or comments easily. In the **Answers** application, you can do your searches to specific search conditions easily through two types:

- [Quick search](#)
- [Advanced search](#)

2.1.15.1. 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.

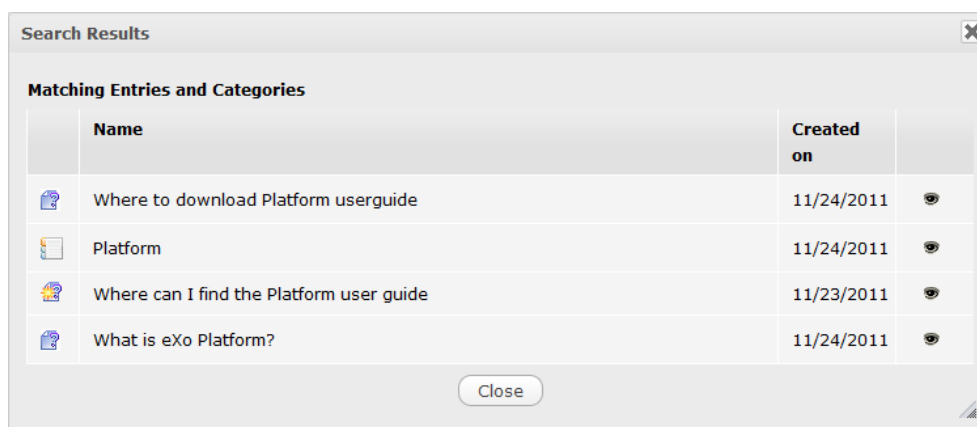
1. Enter a keyword into the **Search** field at the right corner of the breadcrumb.



The image shows a search bar with the text 'Search: Platform'. To the right of the text input field are two icons: a magnifying glass and a house icon.

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.

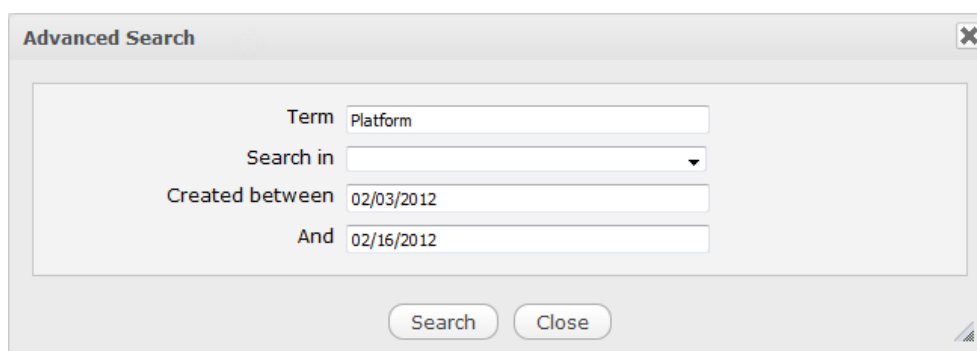
See also

- [View details of Answers](#)
- [Advanced search](#)

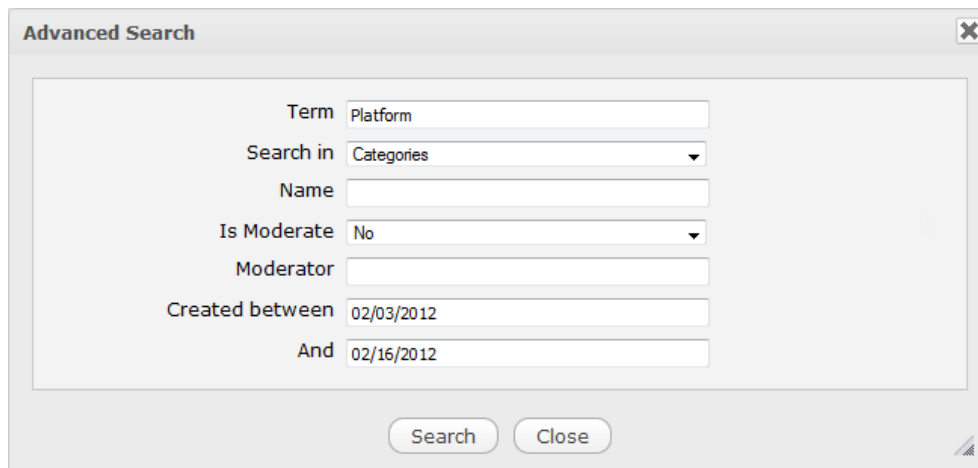
2.1.15.2. Advanced search

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.



- 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.

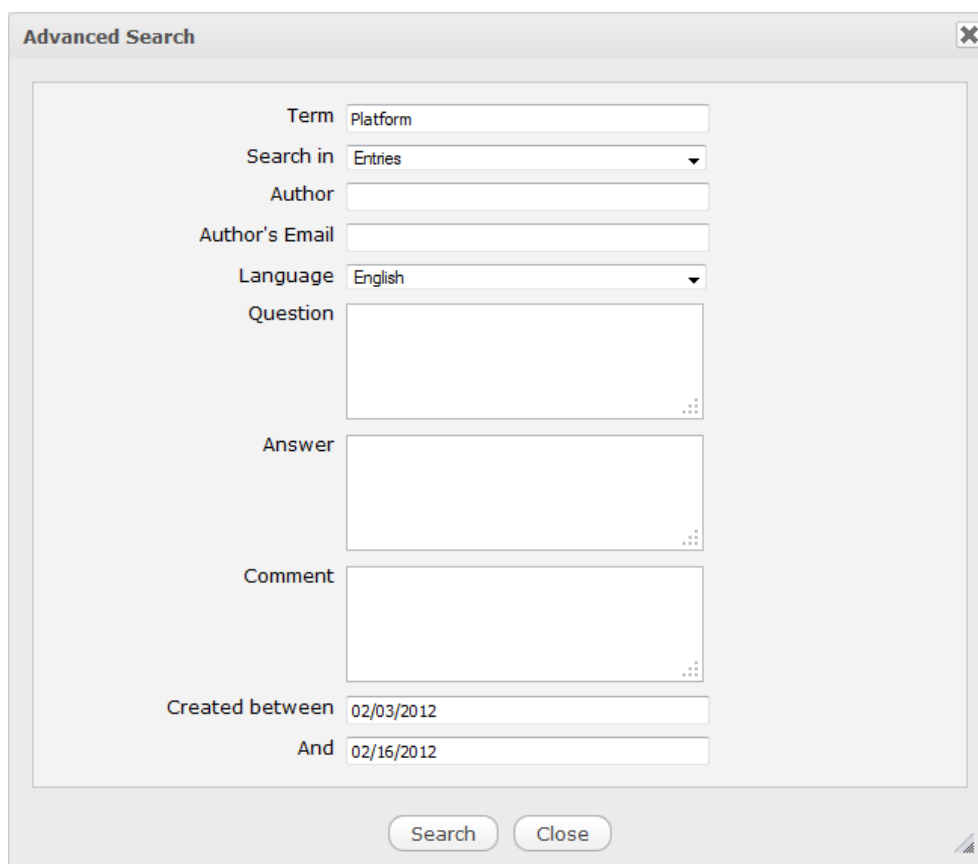


The 'Advanced Search' dialog box contains the following fields and values:

- Term: Platform
- Search in: Categories (dropdown menu)
- Name: (empty text box)
- Is Moderate: No (dropdown menu)
- Moderator: (empty text box)
- Created between: 02/03/2012
- And: 02/16/2012

Buttons: 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 contains the following fields and values:

- Term: Platform
- Search in: Entries (dropdown menu)
- Author: (empty text box)
- Author's Email: (empty text box)
- Language: English (dropdown menu)
- Question: (empty text box)
- Answer: (empty text box)
- Comment: (empty text box)
- Created between: 02/03/2012
- And: 02/16/2012

Buttons: Search, Close


3. Click the **Search** button to launch the search. All items matching your criteria will be listed in the search results pane below the **Search** form.

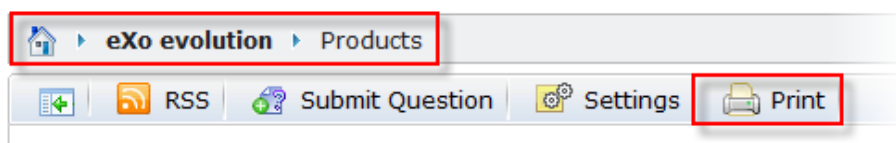
See also

- [View details of Answers](#)
- [Quick search](#)

2.1.16. Print


Print all questions with their answers of a category and its sub-categories

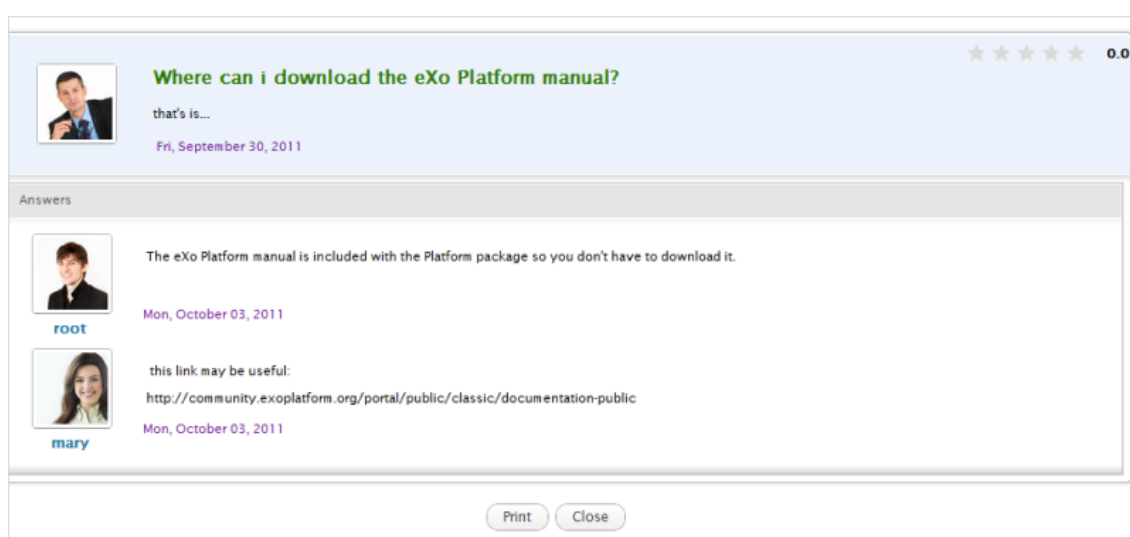
1. Select one parent category from the **Categories** list on the left pane.
2. Click  on the action bar under the selected category.



3. Click the **Print** button 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](#)

2.2. 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.

2.2.1. Manage categories

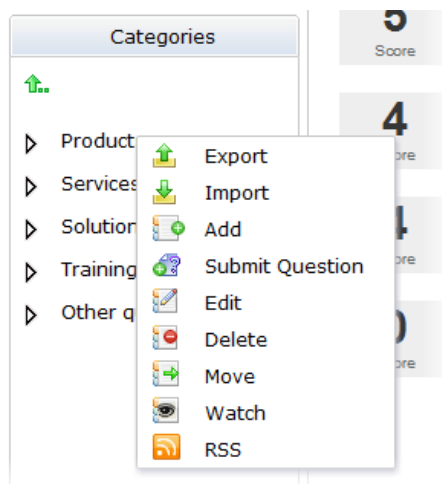
Moderator can only manage categories that he moderates.

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:

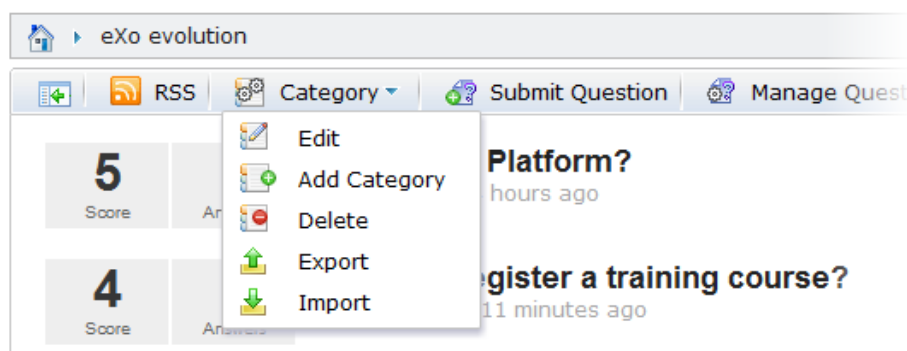
The first way

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.



Managing categories includes the following specific actions:

- [Add a new category](#)
- [Edit category properties](#)
- [Delete a category](#)
- [Move a category](#)
- [Export/Import a category](#)

See also

- [View details of Answers](#)

2.2.1.1. 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
Asterisk (*)	This mark next to each field means that it is required to enter values in the field.
Category	The name of the category.
Order	The order of the category which must be in the positive integer format.
Restricted Audience	Select specific users/groups to be restricted from the category.
Moderate New Questions	Check this option if you want to moderate all newly posted questions before they are viewable.
View Question Authors	Check this option if you want information of the question poster to be shown.
Moderate Answers	Check this option to moderate all answers before they are viewable.
Moderator	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.

2.2.1.2. Edit category properties


1. Follow one of the approaches described in [Manage categories](#).

2. Select


3. Edit the category properties.

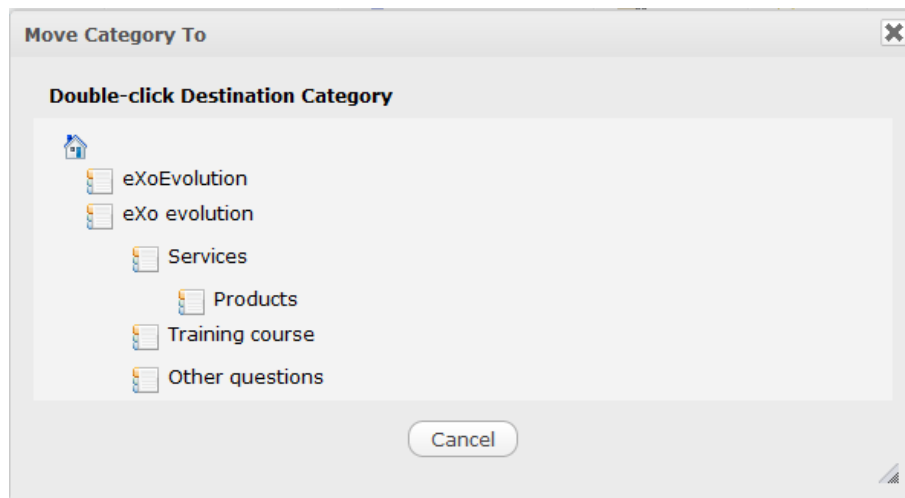
4. Click **Save** to accept your changes.

2.2.1.3. 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.

2.2.1.4. 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.



2.2.1.5. 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.


2.2.2. Moderate questions

In this section, the following topics are covered:



- [View all questions](#)

- [Edit a question](#)
- [Approve/Disapprove a question](#)
- [Activate/Deactivate a question](#)
- [Delete a question](#)
- [Move a question](#)

2.2.2.1. View all questions

Each question may be displayed in different ways, depending on the preset properties when it is created or edited. 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.

2.2.2.2. 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.

2.2.2.3. 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.


2.2.2.4. 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.

2.2.2.5. 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.


2.2.2.6. Move a question

1. Open the **Move Question** form by following one of two ways:

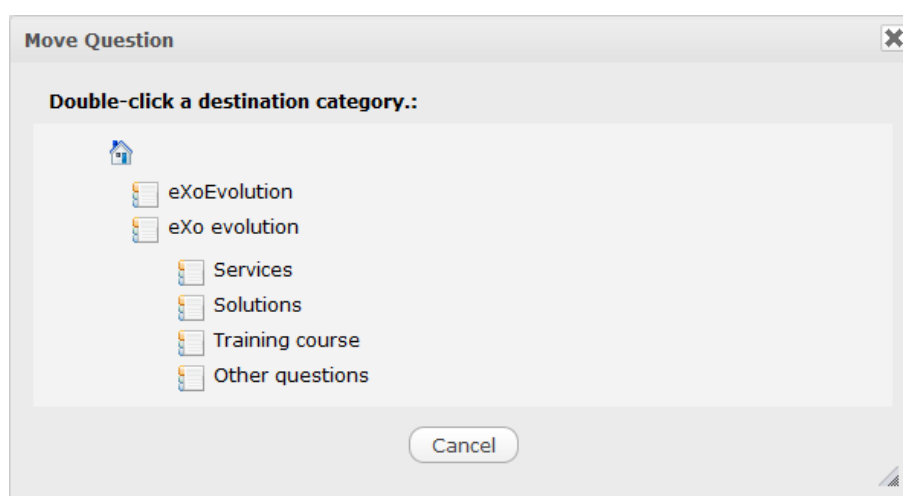
The first way

- 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.



2.2.3. Moderate an answer

In this section, the following topics are covered:

- [Approve/Disapprove an answer](#)
- [Activate/Deactivate an answer](#)
- [Delete an answer](#)
- [Promote a comment as answer](#)

On the top right of an answer, you will see icons that represent actions you can do on that answer.

2.2.3.1. 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.

2.2.3.2. 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.

2.2.3.3. Delete an answer

To delete an answer, click  on the top right of the answer content, then click **OK** in the confirmation message.

2.2.3.4. Promote a comment as answer


This function enables users to log in and give comments on specific questions.

If the comment is considered as the best answer for the question, it can be promoted to the answer.

Leave a comment

1. Follow one of the following two ways:

The first way

- Click the question you want to leave comments, then select  **Comment**.


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

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.

2.3. Administrator

The administrators have the global role and take care of the entire management tasks.

2.3.1. Set up the Answers portlet

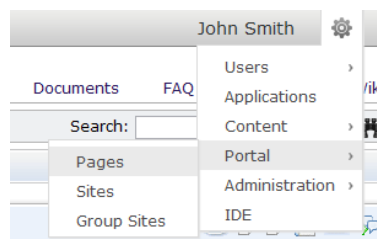
When adding the **Answers** portlet to a page, you have to configure this portlet to make it work in your desired way.


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.



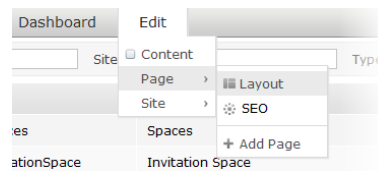
ii. Click  that corresponds to the page containing the **Answers** portlet in the **Page Management** page.

Title	Site Name	Type	portal	
Page Id	Title	Access Permission	Edit Permission	Action
portal:intranet::spaces	Spaces	["./platform/users]	manager:./platform/administrators	 
portal:intranet::invitationSpace	Invitation Space	["./platform/users]	manager:./platform/administrators	 
portal:intranet::pendingSpace	Pending Space	["./platform/users]	manager:./platform/administrators	 
portal:intranet::publicSpace	Public Spaces	["./platform/users]	manager:./platform/administrators	 
portal:intranet::forum	Forum	["./platform/users]	*./platform/administrators	 
portal:intranet::mail	Mail	["./platform/users]	*./platform/administrators	 
portal:intranet::calendar	Calendar	["./platform/users]	*./platform/administrators	 
portal:intranet::contact	Contact	["./platform/users]	*./platform/administrators	 
portal:intranet::documents	documents	["./platform/users]	*./platform/administrators	 
portal:intranet::detail	Detail	["./platform/users]	*./platform/administrators	 
portal:acme::overview	Overview	[Everyone]	editor:./platform/web-contributors	 
portal:acme::news	News	[Everyone]	editor:./platform/web-contributors	 
portal:acme::products	Products	[Everyone]	editor:./platform/web-contributors	 
portal:acme::about	About	[Everyone]	editor:./platform/web-contributors	 

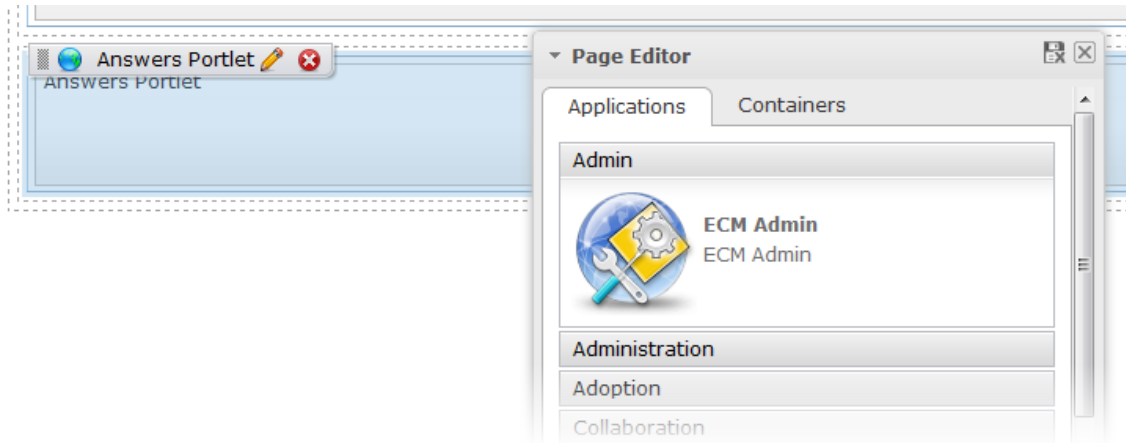
- **The second way**


i. Select a portal that contains a page with the **Answers** portlet, then open the page.

ii. Hover your cursor over **Edit** --> **Page**, then click **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.

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](#)

2.3.1.1. 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**.

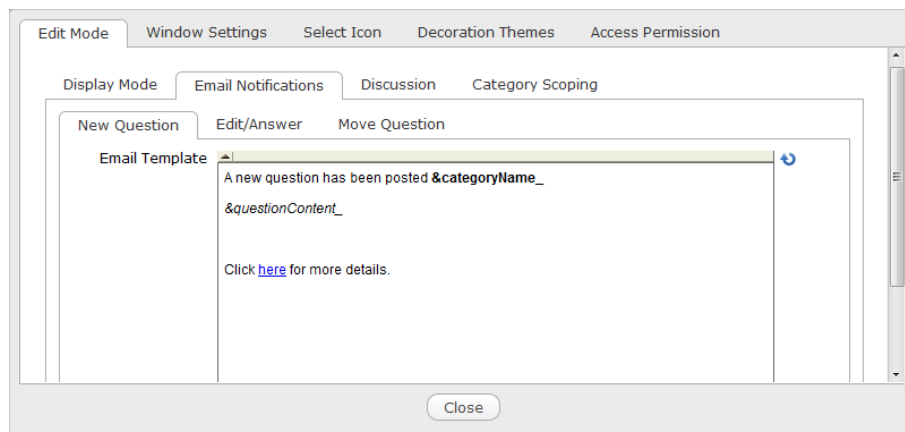
- **Enable Votes and Comments:** Enable votes and comments to be available in **Answers**. If this checkbox is selected, users can comment and vote in **Answers**. If not, these functions are disabled.
- **Anonymous users may submit questions:** Enable anonymous users to submit questions in **Answers** 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](#)

2.3.1.2. 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..

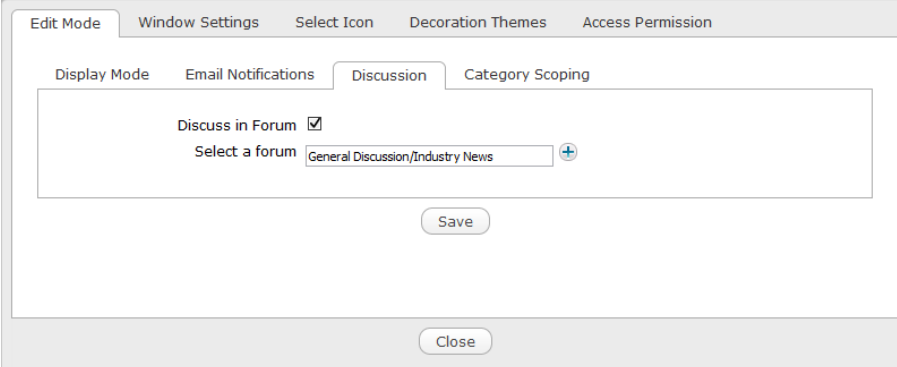
These variables are used to load the content dynamically. Thus, you should not edit them. In case the template is changed unexpectedly, you can go back to the default template by clicking . You can use the text editor to format the template as you wish.

See also

- [View details of Answers](#)
- [Change the display mode](#)
- [Enable the "Discuss in Forum" feature](#)
- [Define the default category for discussions](#)

2.3.1.3. 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.

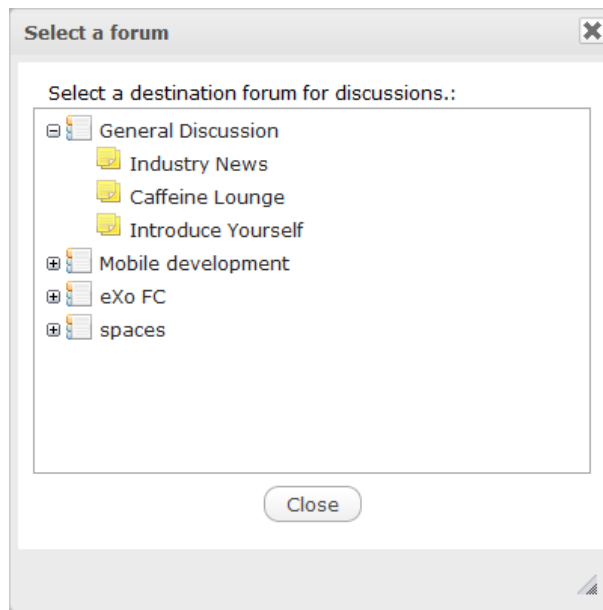


See also

- [View details of Answers](#)
- [Change the display mode](#)
- [Customize the email notification template](#)
- [Define the default category for discussions](#)

2.3.1.4. Define the default category for discussions

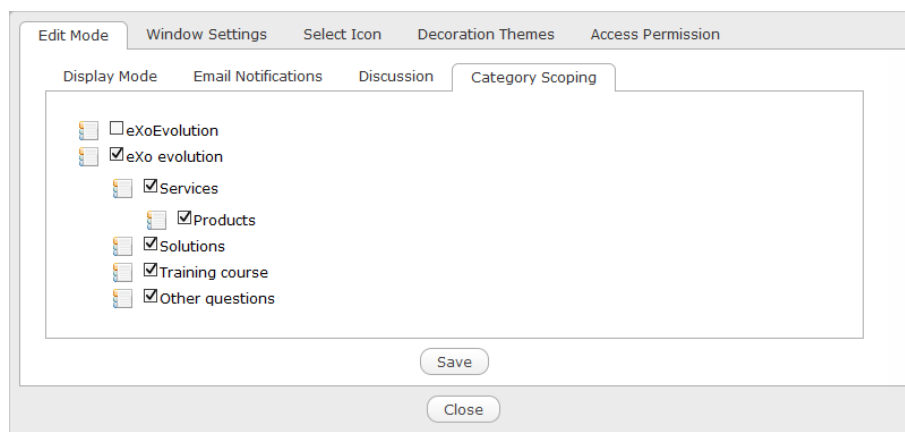
1. Click  next to the **Select a forum** field to open the **Select a forum** form in the **Discussion** tab.



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**.



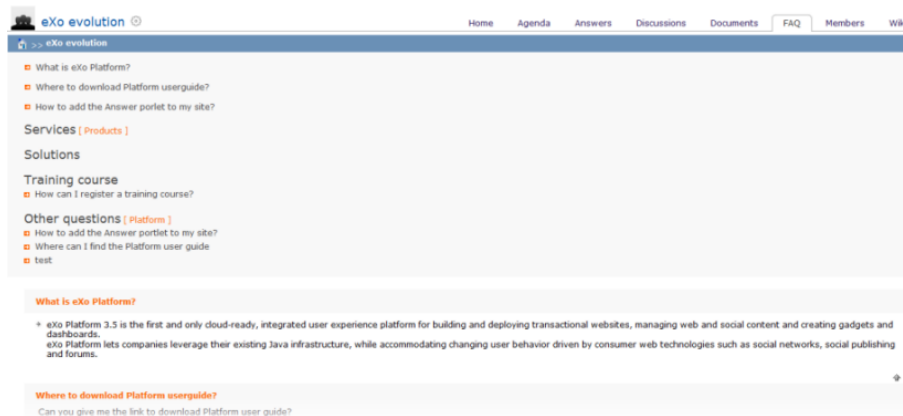
To hide/show any category, simply deselect/select its checkbox and click **Save**.

See also

- [View details of Answers](#)
- [Change the display mode](#)
- [Customize email notification template](#)
- [Enable the "Discuss in Forum" feature](#)

2.3.2. Set up the FAQ portlet

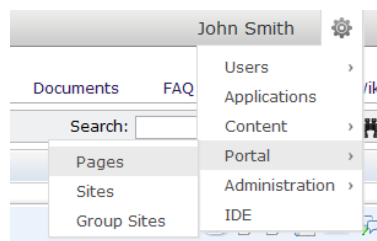
The **FAQ** portlet can be added to a page for users to view questions and answers quickly and easily.































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

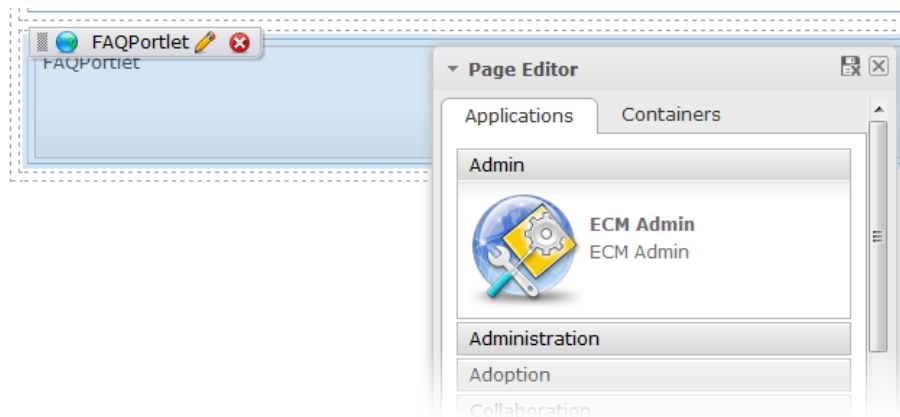
1. Click  --> **Portal** --> **Pages**.



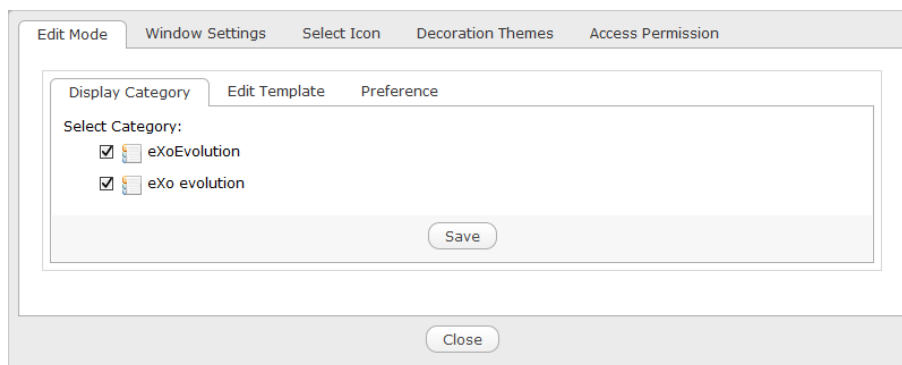
The **Page Manager** page will be displayed.

Title	Site Name	Type	portal	
Page Id	Title	Access Permission	Edit Permission	Action
portal:intranet::spaces	Spaces	["./platform/users]	manager:./platform/administrators	 
portal:intranet::invitationSpace	Invitation Space	["./platform/users]	manager:./platform/administrators	 
portal:intranet::pendingSpace	Pending Space	["./platform/users]	manager:./platform/administrators	 
portal:intranet::publicSpace	Public Spaces	["./platform/users]	manager:./platform/administrators	 
portal:intranet::forum	Forum	["./platform/users]	*./platform/administrators	 
portal:intranet::mail	Mail	["./platform/users]	*./platform/administrators	 
portal:intranet::calendar	Calendar	["./platform/users]	*./platform/administrators	 
portal:intranet::contact	Contact	["./platform/users]	*./platform/administrators	 
portal:intranet::documents	documents	["./platform/users]	*./platform/administrators	 
portal:intranet::detail	Detail	[Everyone]	*./platform/administrators	 
portal:acme::overview	Overview	[Everyone]	editor:./platform/web-contributors	 
portal:acme::news	News	[Everyone]	editor:./platform/web-contributors	 
portal:acme::products	Products	[Everyone]	editor:./platform/web-contributors	 
portal:acme::about	About	[Everyone]	editor:./platform/web-contributors	 

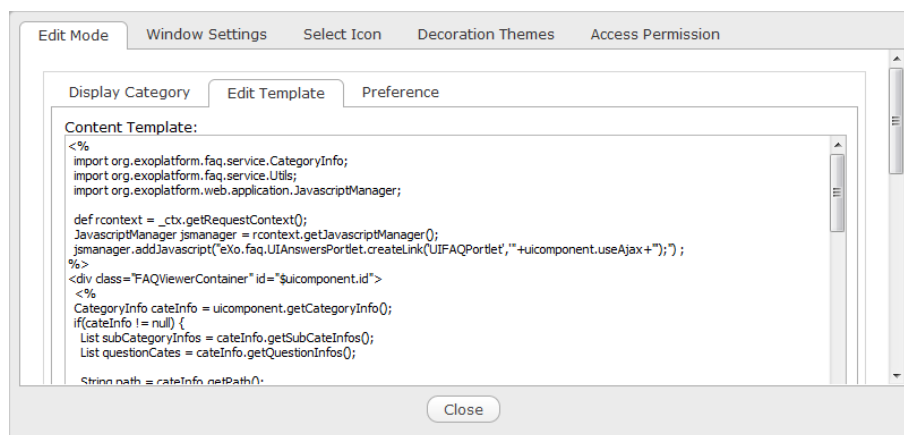
2. Click  that corresponds to the **FAQ** page in the page list. Now, you should be in the page edit mode.
3. Hover your cursor over the **FAQ** portlet and click  in the quick edit toolbar that appears.



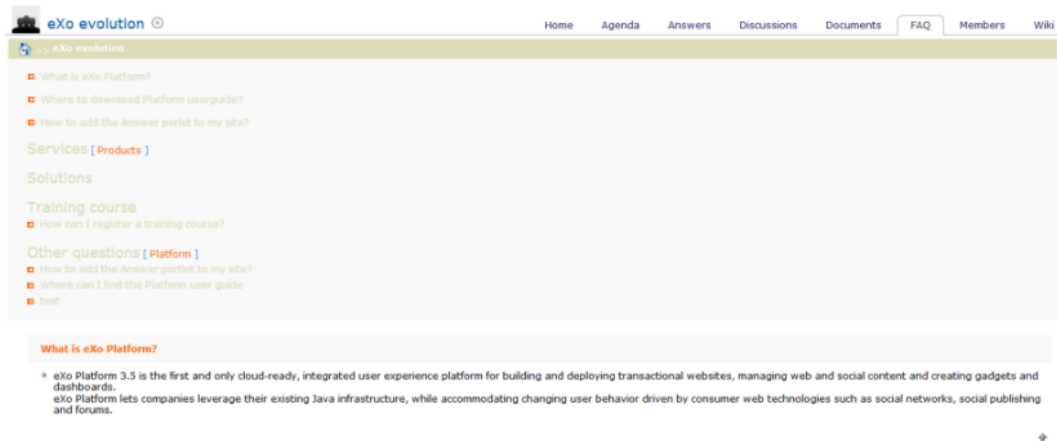
i. In the **Display Category** tab, you can control what categories will be displayed.



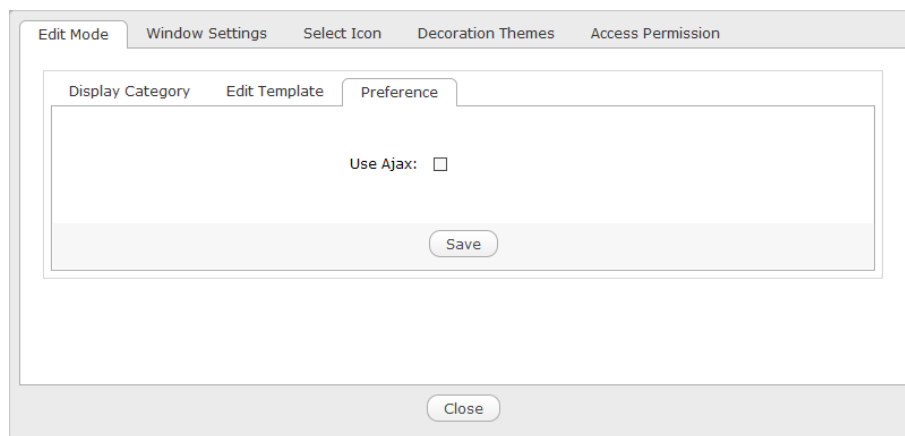
ii. In the **Edit Template** tab, you can use CSS to customize the **FAQ** template.



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](#)

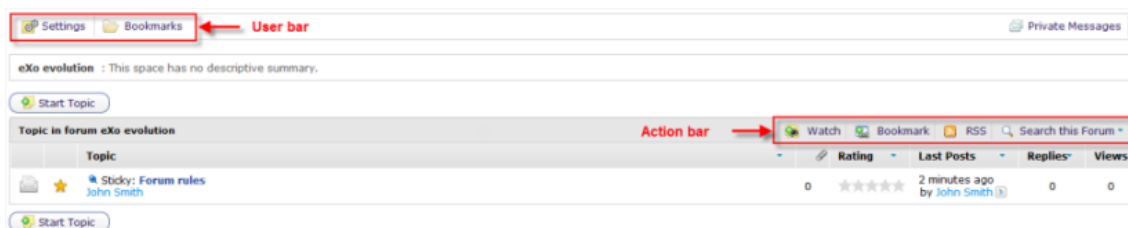
How To Use Forum?

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.

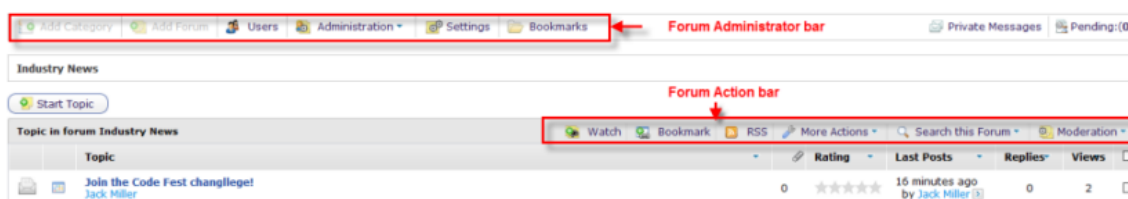
- As a regular user, you will have the **User bar** and **Action bar** with the basic actions.



- 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 Forum for easy sharing.	✓	✓	✓	✓
Attach a file	Upload attachments to a	✓	✓	✓	✓

Features	Description	Administrator	Moderator	Regular user	Guest
	topic/post, preview and download attachments.				
Search	Do the simple and advanced search.	✓	✓	✓	✓
Bookmark	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 a 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 a topic	Stick/unstick topics inside a specific forum.	✓	✓	✓	✗

Features	Description	Administrator	Moderator	Regular user	Guest
Lock/unlock a topic	Close/open topic inside a specific forum.	✓	✓	✗	✗
Split a topic	Divide one topic into two separate topics.	✓	✓	✗	✗
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	Manage the subscription (watch). Edit and delete subscribed email.	✓	✓	✗	✗
Ban a user	Ban users from accessing specific forums or categories	✓	✗	✗	✗
Add a forum	Add a new forum to a specific category.	✓	✗	✗	✗
Edit a forum	Change the title, description, moderator,	✓	✓	✗	✗

Features	Description	Administrator	Moderator	Regular user	Guest
	permissions of a forum. However, moderators cannot set moderators for a forum.				
Delete a forum	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 Forum 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 Forum application.	✓	✗	✗	✗
Delete a category	Delete a category and all forum, topic, post inside it.	✓	✗	✗	✗

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

3.1. Regular users

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

See also

- Actions for [Moderators](#)
- Actions for [Administrators](#)

3.1.1. 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:

Settings Bookmarks

Private Messages

General Discussion

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

Mobile development

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

eXo FC

	Forums	Last Posts	Topics	Posts
	Announcement	eXo FC members by Mary Williams (16 hours ago)	1	1
	Activities	New uniform design by James Davis (15 hours ago)	3	3

spaces

	Forums	Last Posts	Topics	Posts
	eXoEvolution This space has no descriptive summary.	Not Available	0	0
	eXo evolution This space has no descriptive summary.	Forum rules by John Smith (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

3.1.2. 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.

This function can be performed via:

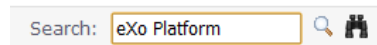
- [Quick search](#)
- [Advanced search](#)

3.1.2.1. Quick search

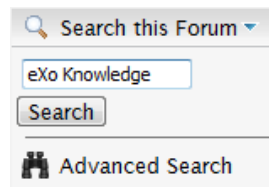
With **Quick Search**, users can directly type a search term in the textbox. All the categories, forums, topics and posts that have the keyword matching the search term will be quickly displayed in the **Search Result** form.

For example:

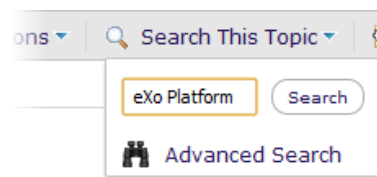
- The **Search** function on the main bar to search for items related to categories, forums, topics and posts.




- 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](#)

3.1.2.2. 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 the **Search** button to do search. Also, click the **Clear Fields** button 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
Terms	The search keyword.
Scope	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.
Username	Filter search results by the category creator. Input the name manually, or click to select users from a specific group.
Created between - and	Filter search results by categories created within an interval. Input the date manually, or click to select a date from the mini calendar.
Moderator	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

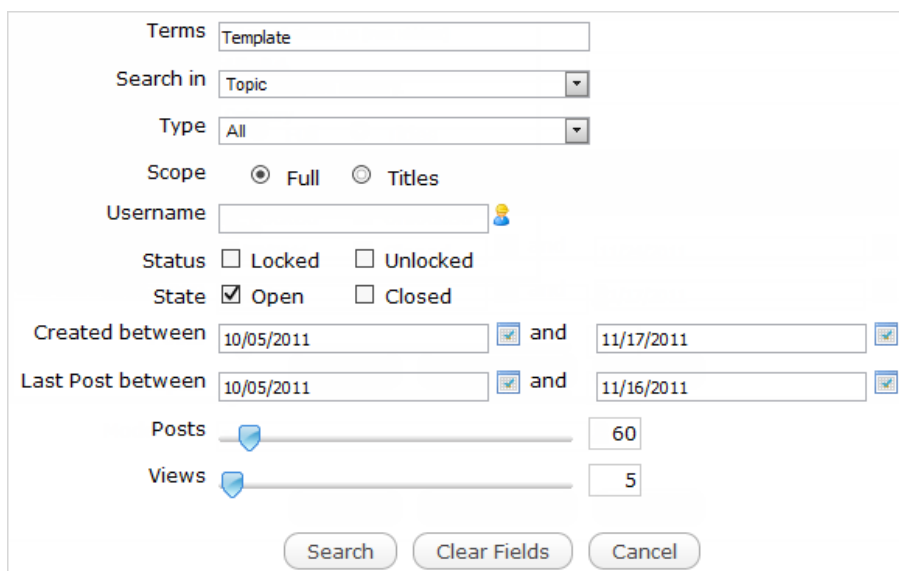
Moderator

Details:

Field	Description
Terms	The search keyword.
Status	The status of the forums ("Locked" or "Unlocked").
State	The state of the forums ("Open" or "Closed").
Posts	Filter search results by the minimum number of posts in the forum. Click and drag the slider bar to set the number of posts.
Topics	Filter search results by the minimum number of topics in the forum. Click and drag the slider bar to set the number of topics.
Moderator	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 set to "Topic".
- Type:** A dropdown menu set to "All".
- Scope:** Radio buttons for "Full" (selected) and "Titles".
- Username:** A text input field with a user icon button.
- Status:** Checkboxes for "Locked" and "Unlocked".
- State:** Checkboxes for "Open" (checked) and "Closed".
- Created between:** Two date input fields with "10/05/2011" and "11/17/2011", separated by "and". Each has a calendar icon.
- Last Post between:** Two date input fields with "10/05/2011" and "11/16/2011", separated by "and". Each has a calendar icon.
- Posts:** A slider bar and a text input field set to "60".
- Views:** A slider bar and a text input field set to "5".
- Buttons:** "Search", "Clear Fields", and "Cancel".

Details:

Field	Description
Terms	The search keyword.
Type	The type of the topic specified by the topic type name and its icon. It can be selected from the existing list.
Status	The status of the topics ("Locked" or "Unlocked").
State	The state of the topics ("Open" or "Closed").
Created between - and	Filter search results by topics created within an interval. Input the date manually, or click  to select a date from the mini calendar.
Last Post between - and	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
Posts	Filter search results by the minimum number of posts in the topic. Click and drag the slider bar to set the number of posts.
Views	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 elements:

- Terms:** A text input field containing the word "Template".
- Search in:** A dropdown menu currently set to "Post".
- Scope:** Two radio buttons, "Full" (selected) and "Titles".
- Username:** A text input field followed by a user icon button.
- Created between:** Two date input fields. The first contains "10/05/2011" and the second contains "11/17/2011", separated by the word "and". Each date field has a calendar icon button.
- Buttons:** Three buttons at the bottom: "Search", "Clear Fields", and "Cancel".

Details:

Field	Description
Term	The search keyword.
Scope	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.
Username	Filter search results by the posters' usernames. Input the name manually, or click to select users from a specific group.
Created between - and	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](#)

3.1.3. Topics

Regular users can do many topic-related actions, including:

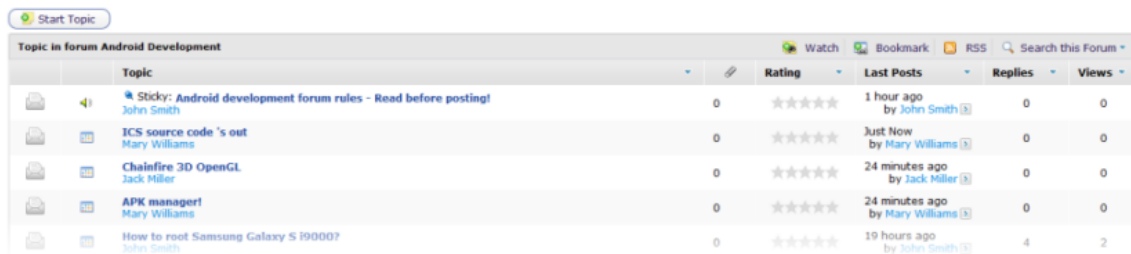
- [Start a topic](#)
- [Edit a topic](#)
- [Create a poll](#)
- [Rate a topic](#)

- [Tag/Untag a topic](#)


3.1.3.1. Start a topic

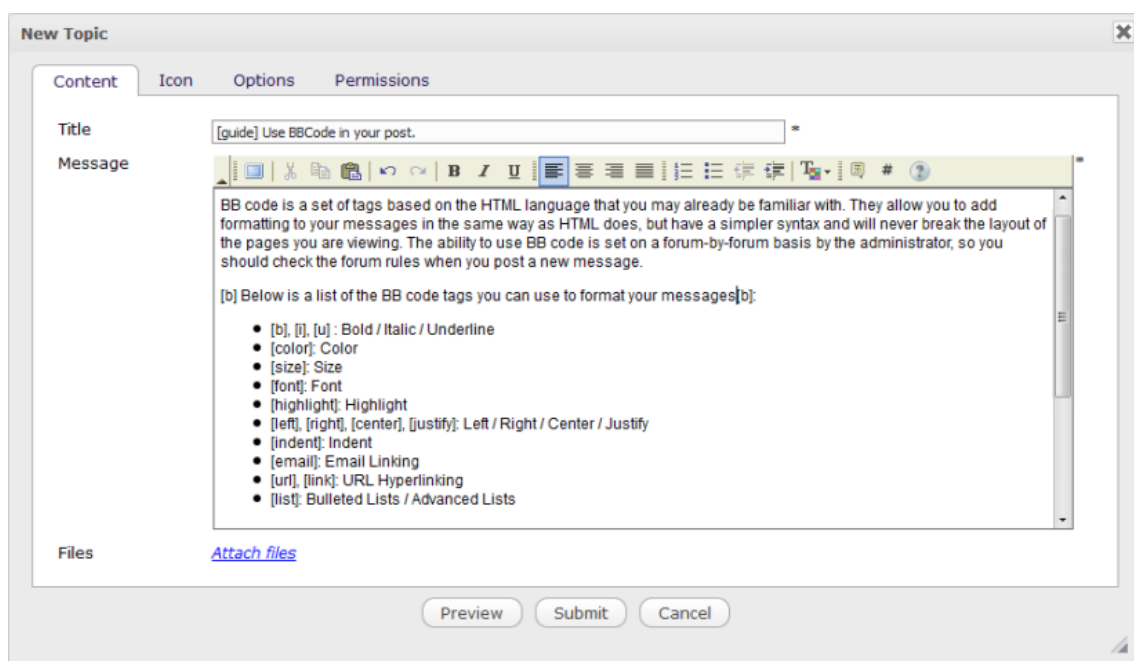
1. Go into the forum where you want to start a new topic.

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.



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:

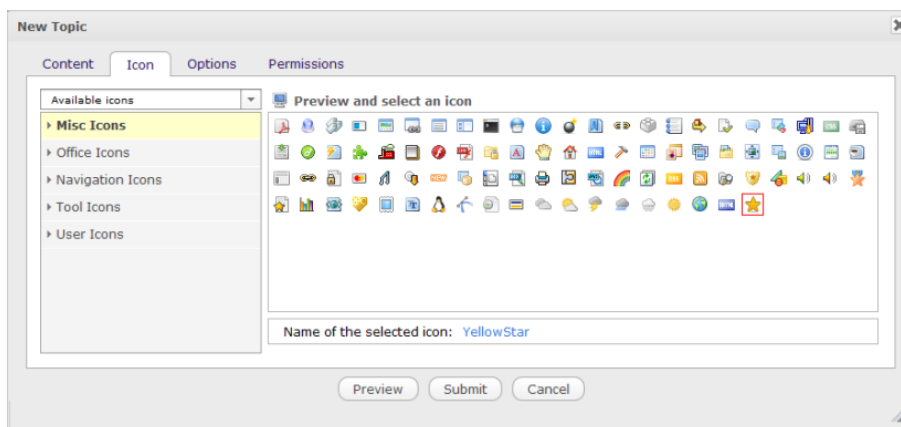
- [Select a topic icon.](#)
- [Set the topic options.](#)

- [Control who can view or post in your topic.](#)

3.1.3.1.1. Select a topic icon

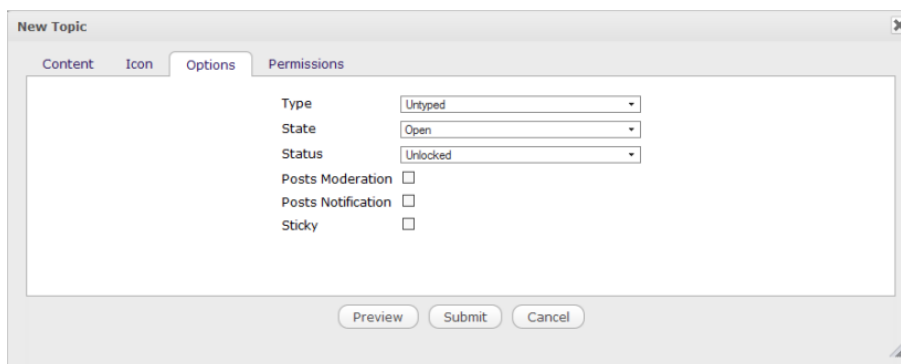
When posting a new topic, you may also assign an icon to the topic for the quick visual identification.

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.





3.1.3.1.2. Set the topic options

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



Details:

Field	Description
Type	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  .
Posts Moderation	Check this option if you want posts to be moderated before being viewed.
Posts Notification	Check this option to enable the notification email when there are new posts in your topic.
Sticky	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.

3.1.3.1.3. 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.

3.1.3.2. Edit a topic


Regular users can only edit their own topic.

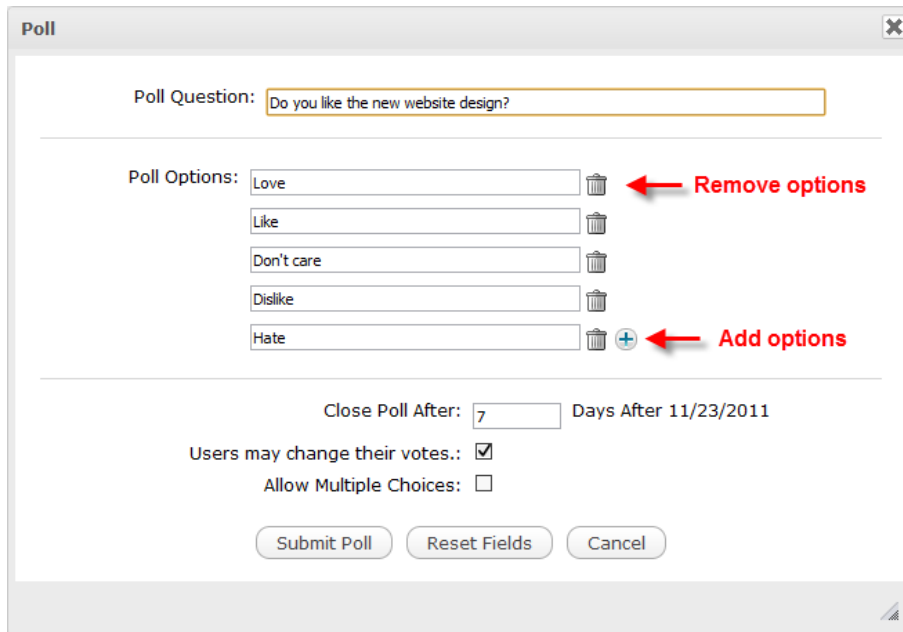
1. Click **More Actions** on the **Action** bar. For regular users, this button is only shown when you are the creator.
2. Click **Edit** from the drop-down menu to open the **Edit Topic** form.

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


3.1.3.3. 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
Poll Question	Question raised for polling that is required.
Poll Options	Options which allow users to select as their answers.
Close Poll After	Period after which the poll is closed.
Users may change their votes	Allow users to change their votes or not.
Allow Multiple Choices	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.

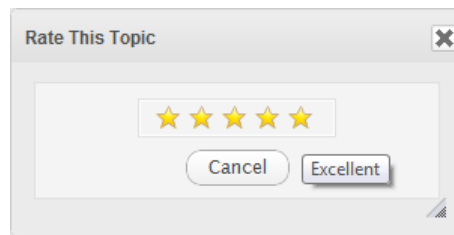


3.1.3.4. Rate a topic

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.

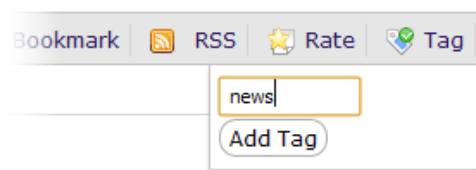
3.1.3.5. Tag/Untag a topic

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.

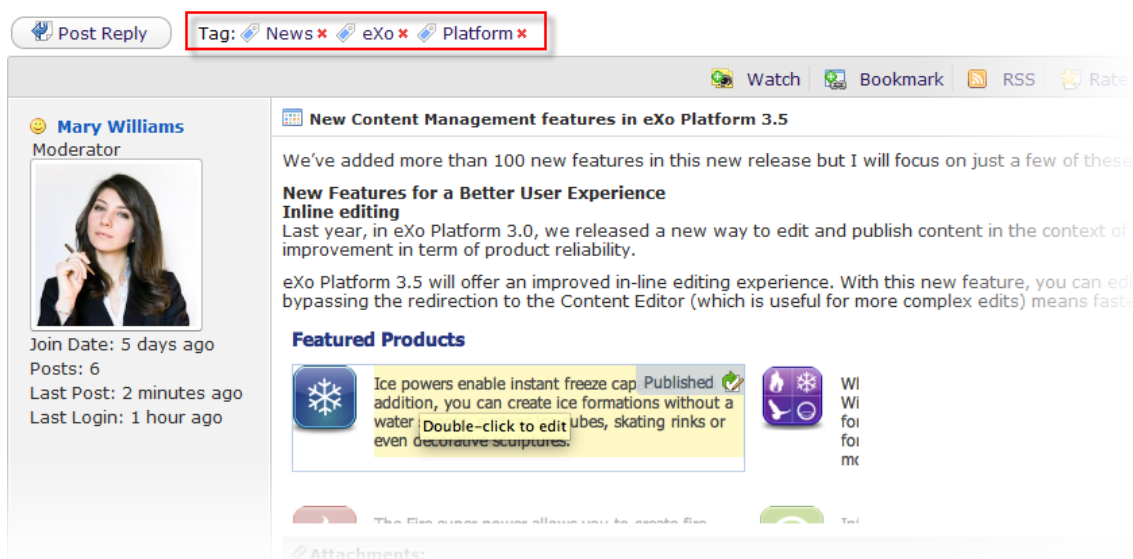
An input text box will pop up.



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.

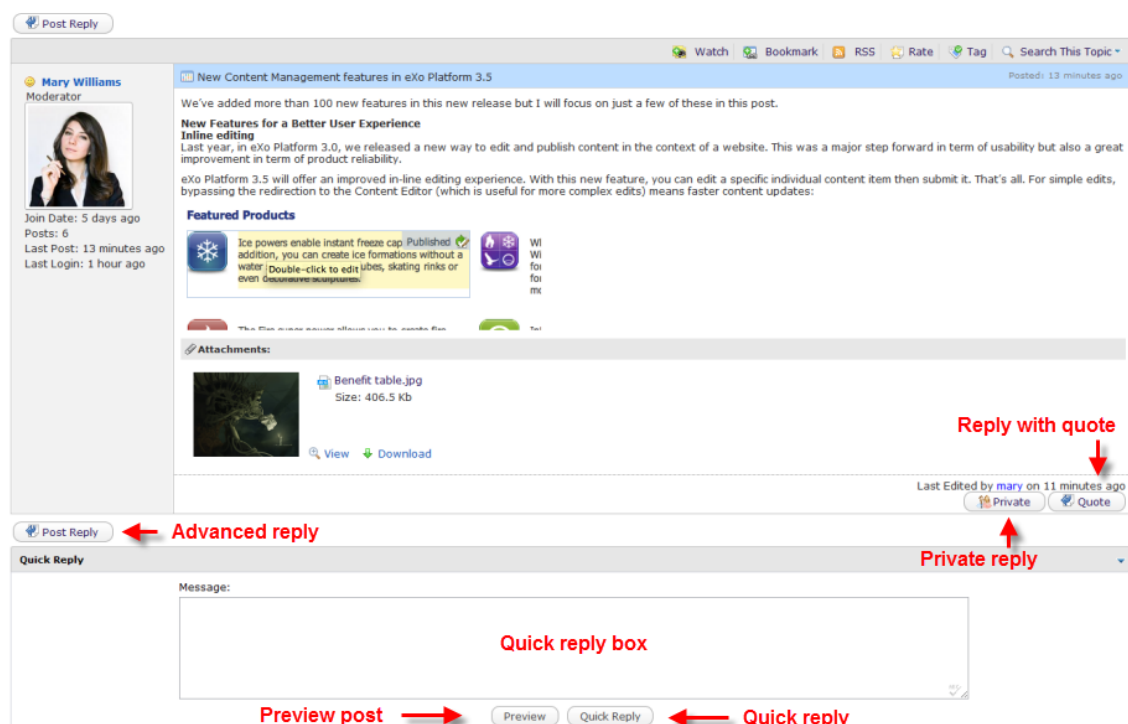
- Click the tag name to be directed to the tags management page.
- Tick your desired topic checkboxes from the topics list.
- Click  **Manage Tag** on the **Action** bar, then select **Untag** from the drop-down menu.

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

3.1.4. 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.



The screenshot shows a forum post by Mary Williams, Moderator, titled "New Content Management features in eXo Platform 3.5". The post content includes a section on "New Features for a Better User Experience" and "Featured Products". Below the post, there are annotations for different reply methods:

- Post Reply** button at the top left of the post.
- Advanced reply** button at the bottom left of the post.
- Quick Reply** box at the bottom of the post.
- Preview post** button next to the Quick Reply box.
- Private reply** button (indicated by a red arrow pointing to the "Private" button).
- Reply with quote** button (indicated by a red arrow pointing to the "Quote" button).
- Quick reply** button (indicated by a red arrow pointing to the "Quick Reply" button).

Also, you can:

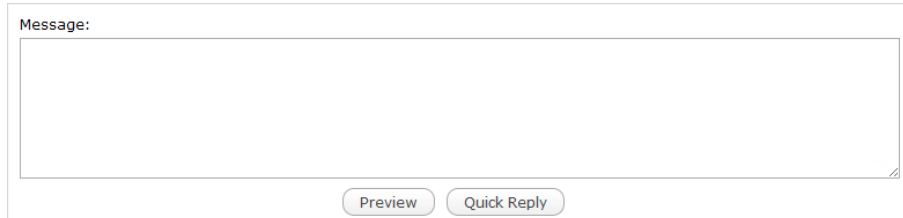
- [Edit your post](#)

- [Delete your post](#)

3.1.4.1. 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 [BBCodes](#) 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.

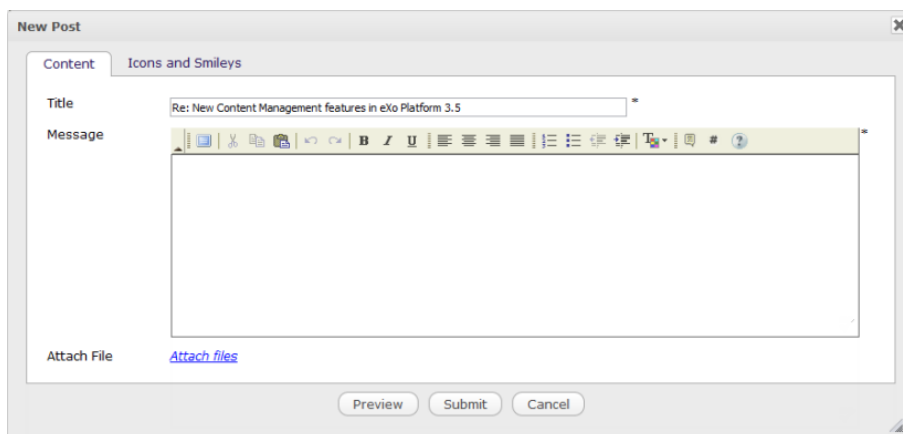
See also

- [Edit your post](#)

3.1.4.2. 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](#)

3.1.4.3. 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

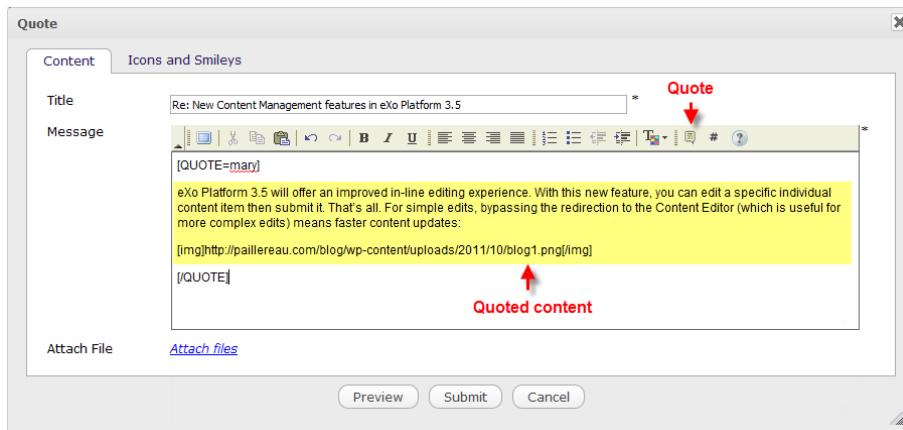
Private posts will not be checked for approval when it is posted in a topic that has the 'Posts moderation' enabled. Private posts are displayed with the 'Post private!' label.

3.1.4.4. 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=many]` 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.

3.1.4.5. Edit your post

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

1. Click  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.

3.1.4.6. Delete your post


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

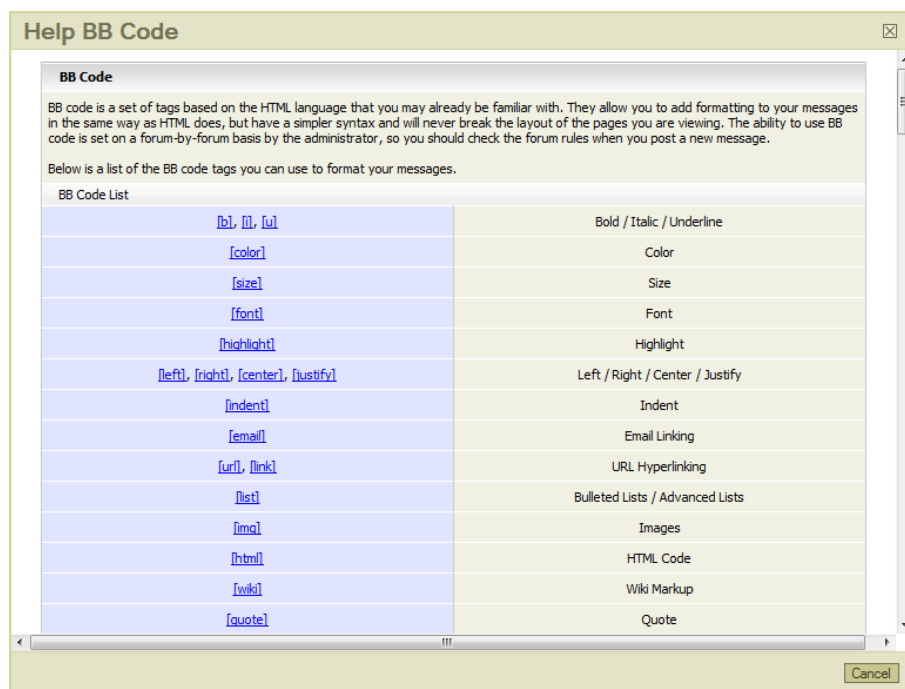
3.1.5. Use BB Codes

BB Codes (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.



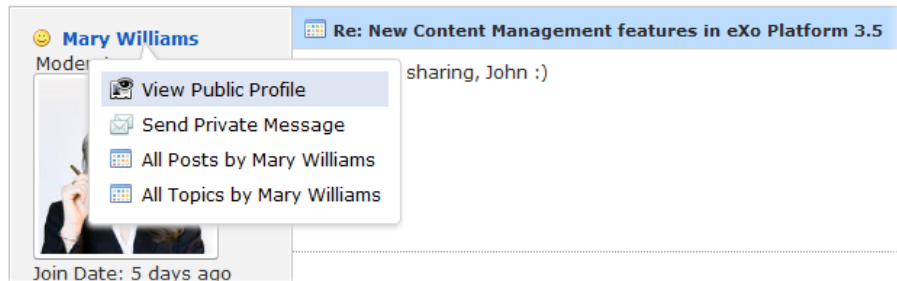
Click  on the toolbar to get the full list of built-in BBCode explanations and examples.



3.1.6. 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.



3.1.7. Private messages

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

- [Send a private message](#)
- [Receive a private message](#)

3.1.7.1. 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.

 A screenshot of the 'Private Messages' form. It has a title bar 'Private Messages' with a close button. The form contains three main sections: 'Send to' with a text box containing 'mary' and a selection icon; 'Title' with an empty text box; and 'Message' with a rich text editor toolbar and a large text area.

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.

3.1.7.2. 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.

 A screenshot of the 'Private Messages' form with the 'Inbox' tab selected. It shows a table of messages. The first message is from 'james' with the subject 'Why is my topic locked?' and was received '1 minute ago'. There is a trash icon next to the message.

Message	From	Received on
Why is my topic locked?	james	1 minute ago

Details:

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

3.1.8. 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](#)
- [View bookmarks](#)
- [Delete a bookmark](#)

3.1.8.1. Add a bookmark


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

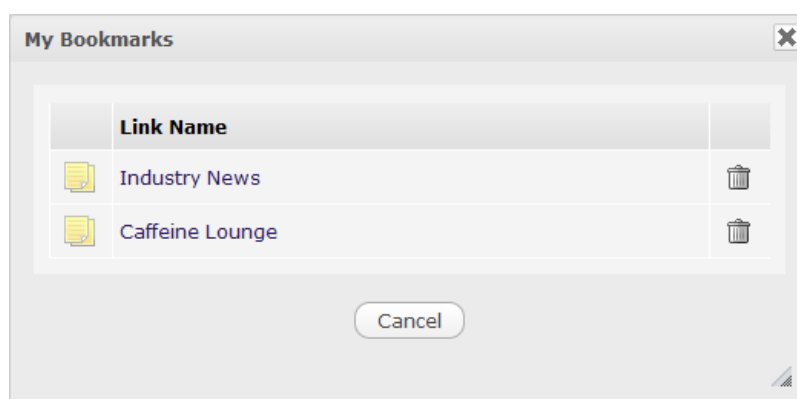
1. Go into the object (category, forum or topic) you want to bookmark.

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.

3.1.8.2. View bookmarks

To view bookmarks, 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.




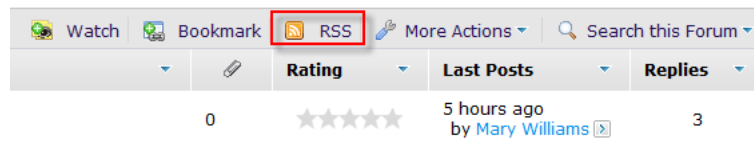
3.1.8.3. Delete a bookmark

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

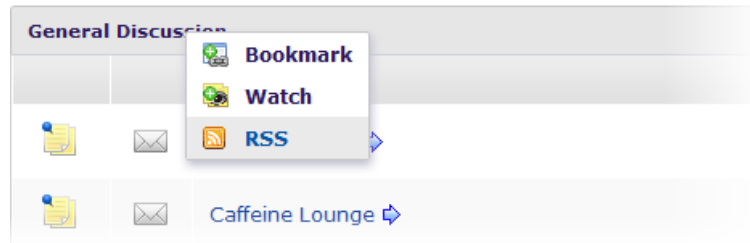
The selected bookmarks will be removed from the bookmarks list.

3.1.9. Subscribe to RSS feeds

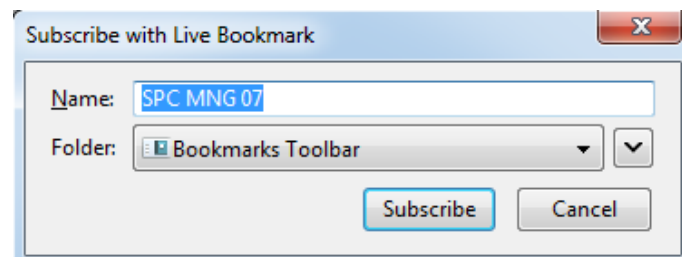
This function is for all users to subscribe to a specific category, forum, topic. If there are any changes, the feed of the subscribed category, forum or topic will be updated. To get the RSS feed, click  **RSS** on the **Action** bar.



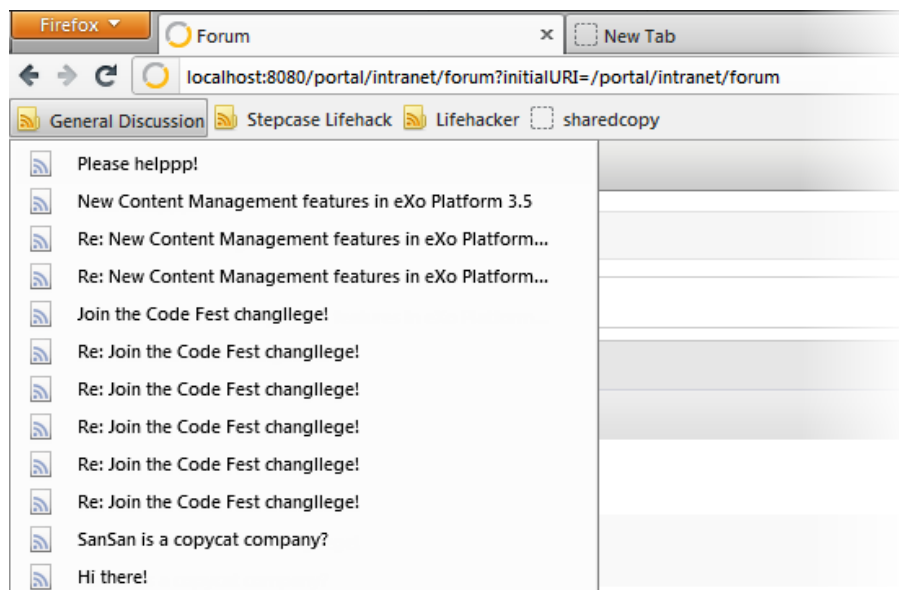
Or right-click the item you want to subscribe to.



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).

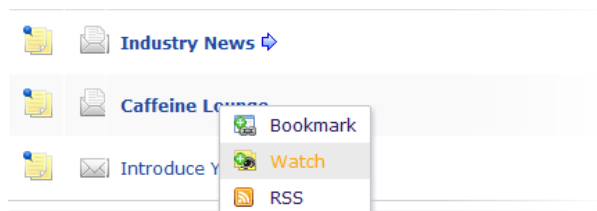
3.1.10. Watch

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.



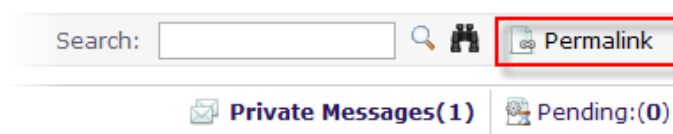
Note

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.

3.1.11. 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.

3.1.12. User settings

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

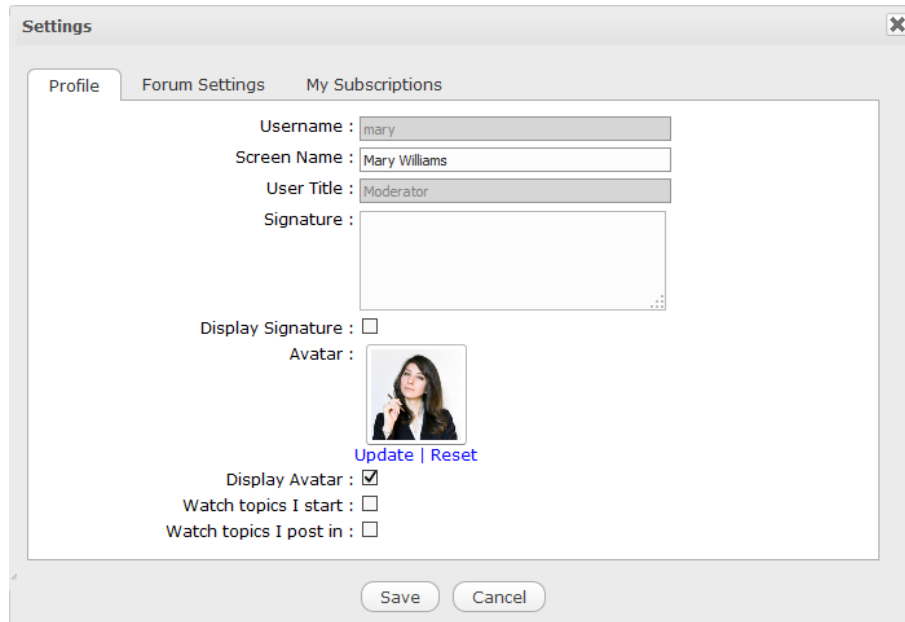
Click  **Settings** on the **User** bar to go to the **Settings** form. Once you opened the **Settings** form, you can control your personal settings, options and preferences via the following actions:

- [Edit your profile](#)

- [Change forum settings](#)
- [Edit your subscription](#)

3.1.12.1. Edit your profile

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



The screenshot shows a 'Settings' window with three tabs: 'Profile', 'Forum Settings', and 'My Subscriptions'. The 'Profile' tab is active. It contains the following fields and options:

- Username :** mary
- Screen Name :** Mary Williams
- User Title :** Moderator
- Signature :** (empty text area)
- Display Signature :** ☐
- Avatar :** (image of a woman) with [Update](#) | [Reset](#) links below it.
- Display Avatar :** ☒
- Watch topics I start :** ☐
- Watch topics I post in :** ☐

At the bottom of the window are **Save** and **Cancel** buttons.

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.

3.1.12.2. 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.

Settings

Profile **Forum Settings** My Subscriptions

Time Zone: (GMT 0:00) Greenwich Mean Time: Dublin, LI

Short Date Format: mm/dd/yyyy (11/23/2011)

Long Date Format: eee, mmmm dd, yyyy (Wed, November 23, 2011)

Time Format: 12-hour

Topics Per Page: 10

Posts Per Page: 10

Show Forum Jump: ☒

Save Cancel

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

3.1.12.3. Edit your subscription

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

Settings

Profile Forum Settings **My Subscriptions**

Title		
Industry News	<input type="checkbox"/>	<input type="checkbox"/>

Your personal feed URL is :

Your watches are sent to :

Update

Save Cancel

- In 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.

3.2. 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.

See also


- Actions for [Regular users](#)
- Actions for [Administrators](#)

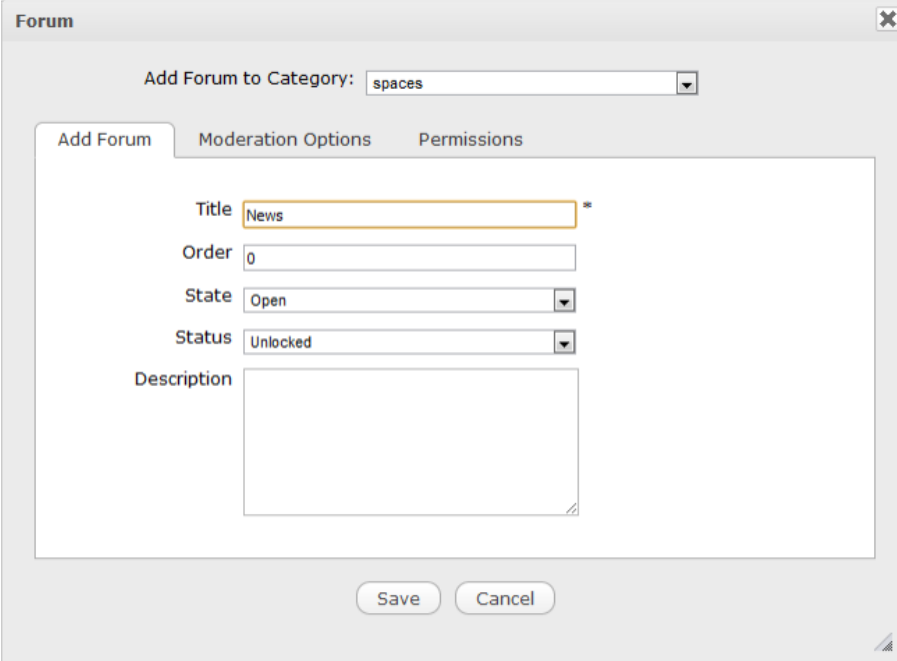
3.2.1. Moderate forums

Moderators can manage all the forums inside their assigned categories. If you are a moderator of any category, you can do the following actions:

- [Edit a forum](#)
- [Lock/Unlock a forum](#)
- [Close/Open a forum](#)
- [Move a forum](#)

3.2.1.1. 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.




The screenshot shows a 'Forum' dialog box with a close button in the top right corner. At the top, there is a label 'Add Forum to Category:' followed by a dropdown menu showing 'spaces'. Below this are three tabs: 'Add Forum', 'Moderation Options', and 'Permissions'. The 'Add Forum' tab is active, showing a form with the following fields: 'Title' (text input with 'News' and an asterisk), 'Order' (text input with '0'), 'State' (dropdown menu with 'Open'), 'Status' (dropdown menu with 'Unlocked'), and 'Description' (text area). At the bottom of the dialog are 'Save' and 'Cancel' buttons.

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


3.2.1.2. 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.


3.2.1.3. 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.

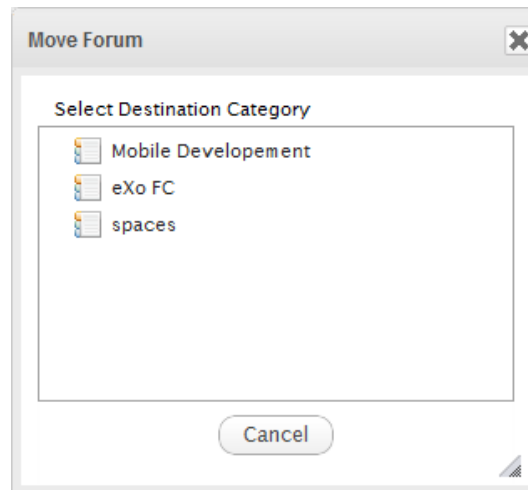
1. Go into the forum you want to close or open.
2. Click  More Actions on the **Action** bar, then select **Close** or **Open** from the drop-down menu.

3.2.1.4. 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.



3.2.2. Moderate topics

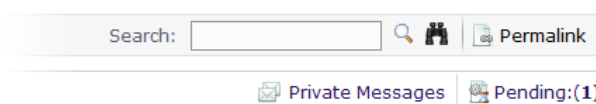
Topics are moderated via the following actions:

- [Approve a topic](#)
- [Edit a topic](#)
- [Move a topic](#)
- [Delete a topic](#)
- [Close/Open a topic](#)
- [Lock/Unlock a topic](#)
- [Stick/Unstick a topic](#)
- [Merge topics](#)
- [Split a topic](#)

3.2.2.1. 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;

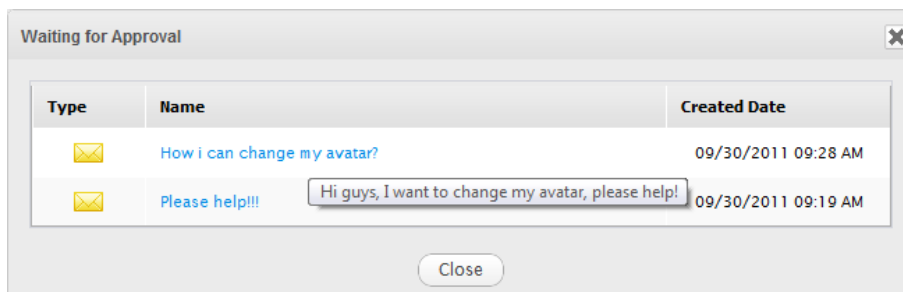
Or, if you are in a topic, simply click  **More Actions** on the **Action** bar.

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.



The dialog box titled "Waiting for Approval" contains a table with the following data:


Type	Name	Created Date
	How i can change my avatar?	09/30/2011 09:28 AM
	Please help!!! Hi guys, I want to change my avatar, please help!	09/30/2011 09:19 AM

A "Close" button is located at the bottom of the dialog.

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

3.2.2.2. 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.



The screenshot shows a forum topic list with columns: RSS, More Actions, Search this Forum, Moderation, and checkboxes. The first topic is selected, and the moderation menu is open, showing options: Open, Close, Lock, Unlock, Stick, Unstick, Move, Delete, Merge, and Censor. The "Open" option is highlighted with a red box.

	Rating	Last Posts	Replies	Actions	Checkbox
0	★★★★★	3 hours ago by John Smith	0	Open, Close, Lock, Unlock, Stick, Unstick, Move, Delete, Merge, Censor	<input checked="" type="checkbox"/>
0	★★★★★	2 hours ago by Mary Williams	0		<input type="checkbox"/>
0	★★★★★	2 hours ago by Jack Miller	0		<input type="checkbox"/>
0	★★★★★	21 hours ago by John Smith	4		<input type="checkbox"/>
0	★★★★★	1 hour ago by Mary Williams	0		<input type="checkbox"/>

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


3.2.2.3. 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.

3.2.2.4. Move a topic

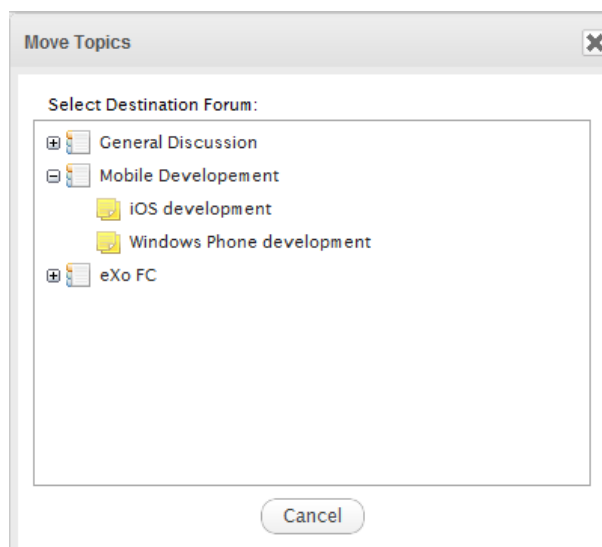
Only administrators and moderators can perform this action. This function is used to move topics from a forum to another one. Moderator can only move topics between forums that he manages.

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.

3.2.2.5. 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.

3.2.2.6. 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.

3.2.2.7. Stick/Unstick a topic

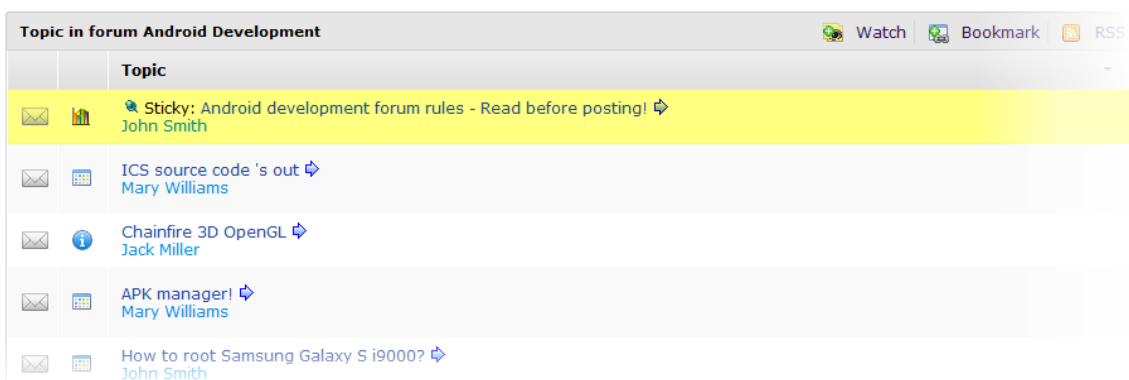
This function is for administrators and moderators only to stick topics which will be located at the top of the topics list. The topics will not fall down the list if any new posts are added.

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.

3.2.2.8. Merge topics

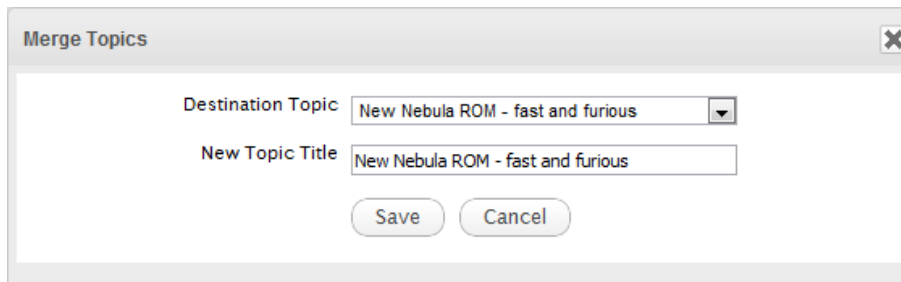
When there are two or more related topics, you may want to merge these topics into one.

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.



The **Merge Topics** form is a dialog box with a title bar and a close button. It contains two input fields: **Destination Topic** with a dropdown menu showing "New Nebula ROM - fast and furious", and **New Topic Title** with a text input field also containing "New Nebula ROM - fast and furious". At the bottom are **Save** and **Cancel** buttons.

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.

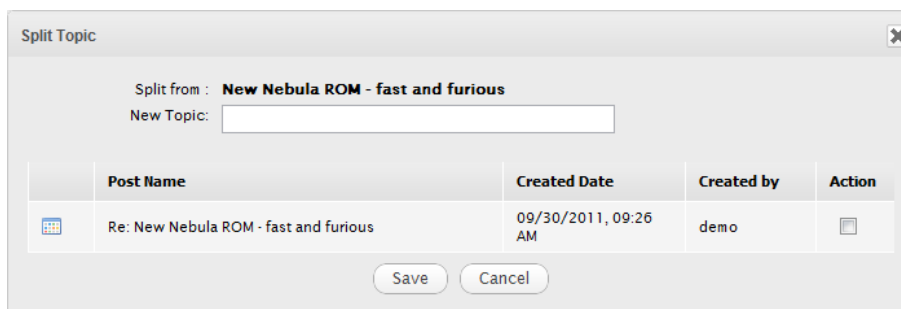
After being merged, selected topics will be joined into one topic. All posts of the other topics are displayed as posts below the main entry.

3.2.2.9. 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.



The **Split Topic** form is a dialog box with a title bar and a close button. It contains a **Split from :** label followed by the text "New Nebula ROM - fast and furious". Below it is a **New Topic:** label followed by an empty text input field. At the bottom are **Save** and **Cancel** buttons. In the center is a table with the following data:

	Post Name	Created Date	Created by	Action
	Re: New Nebula ROM - fast and furious	09/30/2011, 09:26 AM	demo	

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

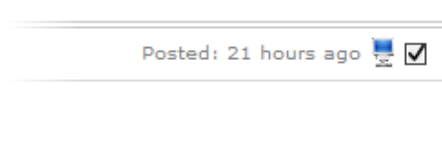
4. Select posts by ticking their respective checkboxes.

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.

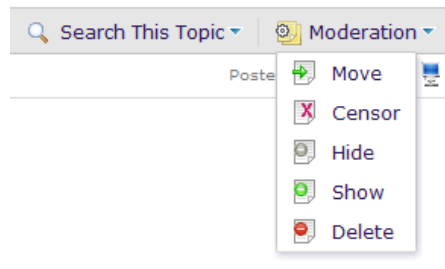
3.2.3. Moderate posts

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.



The moderation bar is a horizontal bar with a light blue background. It contains the text "Posted: 21 hours ago" followed by a computer icon and a checked 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.

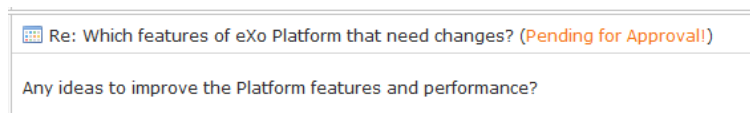


The followings are actions that a moderator can perform on a post:

- [Approve a post](#)
- [Delete a post](#)
- [Move a post](#)
- [Hide a post](#)
- [Show a post](#)
- [Uncensor a post](#)


3.2.3.1. 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.
2. Click  **Moderation** on the **Action** bar, and select **Approve** from the drop-down menu.


The second way

1. Click  **Moderation** on the **Action** bar, and click **Approve** from the drop-down menu. The **Unapproved Topics List** form opens.
2. 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.
3. Click **Approve** to accept your approval.


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

3.2.3.2. Delete a post

The first way


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

The second way

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

3.2.3.3. Move a post

You can move posts to a topic of your choice.

1. Select the post that you would like to move.
2. Click  **Moderation** on the **Action** bar, then select **Move** from the drop-down menu.
3. 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.

3.2.3.4. 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.


3.2.3.5. 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.
1. Click  **Moderation** on the **Action** bar, then select **Show** from the drop-down menu.
 2. Select hidden posts by ticking their checkboxes.
 3. Click **Show**.

3.2.3.6. 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.

1. Select censored posts/topics by ticking their checkboxes.
2. Select  **Moderation** on the **Action** bar, then click **Censor** from the drop-down menu.

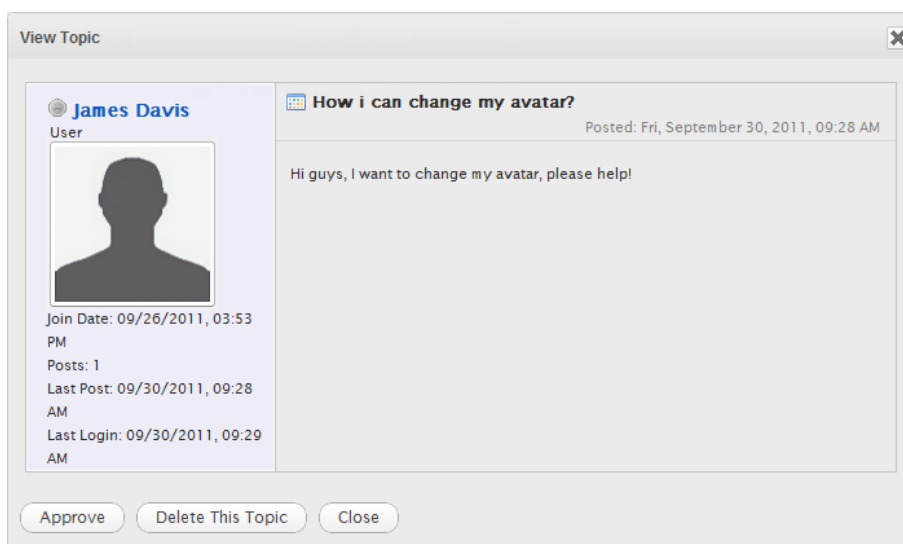
The second way

- Follow this method to uncensor posts/topics in the list of existing hidden posts/topics.

1. Click **Moderation** on the **Action** bar, then select **Censor** from the drop-down menu. A list of hidden posts appears.
2. Select hidden posts by ticking their relevant checkboxes.
3. Click **Show**.

3.2.4. View all pending moderation tasks

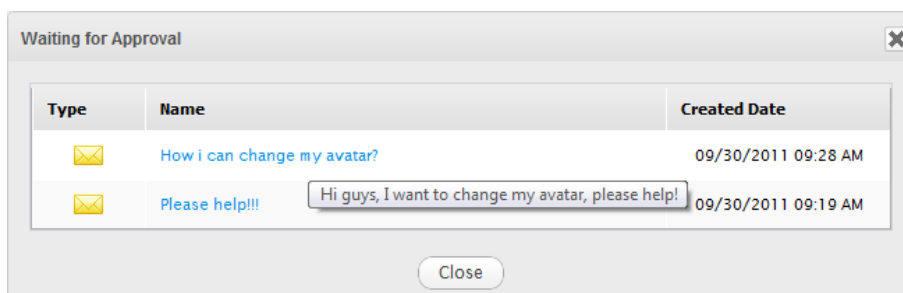
Administrators and moderators can manage all pending tasks in **Forum** easily. The total number of pending topic/posts that need to be moderated are shown right on the **User** bar/**Forum Administration** bar.





The screenshot shows a 'View Topic' window. On the left, there is a user profile for 'James Davis' with a placeholder avatar. Below the name, it says 'User'. To the right of the profile, there is a post titled 'How i can change my avatar?' with a timestamp 'Posted: Fri, September 30, 2011, 09:28 AM'. The post content reads 'Hi guys, I want to change my avatar, please help!'. At the bottom of the window, there are three buttons: 'Approve', 'Delete This Topic', and 'Close'.

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.



The screenshot shows a 'Waiting for Approval' form. It contains a table with the following data:

Type	Name	Created Date
	How i can change my avatar?	09/30/2011 09:28 AM
	Please help!!! Hi guys, I want to change my avatar, please help!	09/30/2011 09:19 AM

At the bottom of the form, there is a 'Close' button.

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.

Search: Permalink

Private Messages Pending:(2)

2. Click the **Approve** button 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.

3.2.5. 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.

Banned IPs

Filter:

IP	
<input type="text"/> * <input type="text"/> * <input type="text"/> * <input type="text"/> *	[Add]
192.168.1.11	[Posts] [X]
192.168.1.25	[Posts] [X]
192.168.4.77	[Posts] [X]

Close

view posts

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

3.3. Administrator

With the highest rights, administrators are in charge of the entire management tasks, including [configuring and customizing the Forum portlet](#), [backing up data](#), [managing users and granting permissions](#), [managing categories and forums](#). Administrator has the global role.

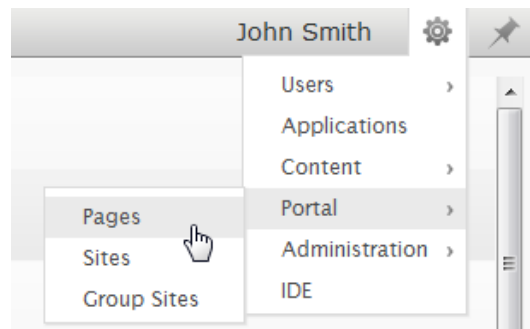
See also

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





























3.3.1. 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**.

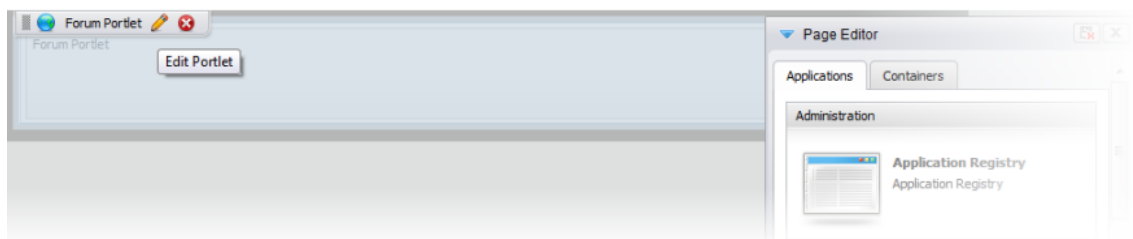



The **Page Manager** page will be displayed.

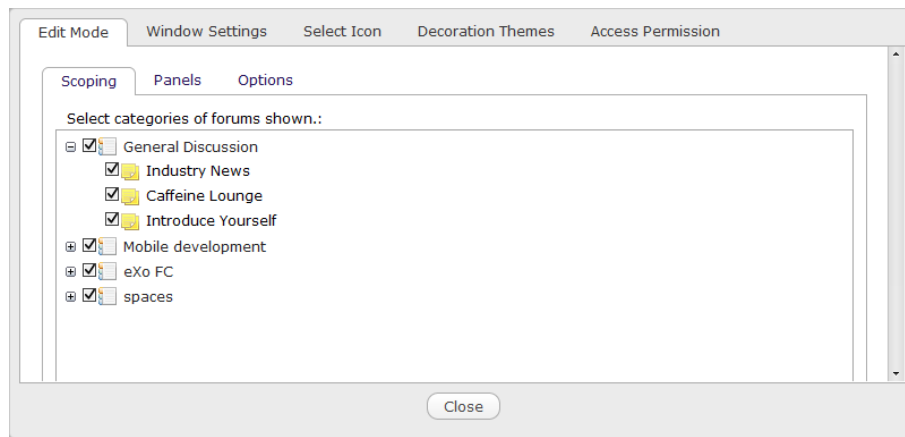
Title	Site Name	Type	portal	
Page Id	Title	Access Permission	Edit Permission	Action
portal:intranet::spaces	Spaces	[*/platform/users]	manager:/platform/administrators	 
portal:intranet::invitationSpace	Invitation Space	[*/platform/users]	manager:/platform/administrators	 
portal:intranet::pendingSpace	Pending Space	[*/platform/users]	manager:/platform/administrators	 
portal:intranet::publicSpace	Public Spaces	[*/platform/users]	manager:/platform/administrators	 
portal:intranet::forum	Forum	[*/platform/users]	*/platform/administrators	 
portal:intranet::mail	Mail	[*/platform/users]	*/platform/administrators	 
portal:intranet::calendar	Calendar	[*/platform/users]	*/platform/administrators	 
portal:intranet::contact	Contact	[*/platform/users]	*/platform/administrators	 
portal:intranet::documents	documents	[*/platform/users]	*/platform/administrators	 
portal:intranet::detail	Detail	[Everyone]	*/platform/administrators	 
portal:acme::overview	Overview	[Everyone]	editor:/platform/web-contributors	 
portal:acme::news	News	[Everyone]	editor:/platform/web-contributors	 
portal:acme::products	Products	[Everyone]	editor:/platform/web-contributors	 
portal:acme::newsAndProducts	NewsAndProducts	[Everyone]	editor:/platform/web-contributors	 

[Add New Page](#)

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, including:

- [Specify the category scoping](#)
- [Enable/Disable Forum components](#)
- [Enable/Disable a bookmarkable Forum URL](#)

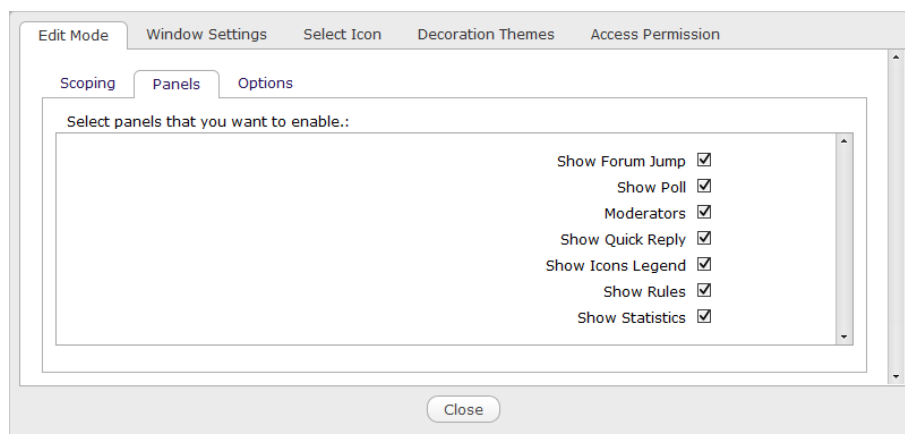
3.3.1.1. Specify the category scoping

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

3.3.1.2. Enable/Disable Forum components

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

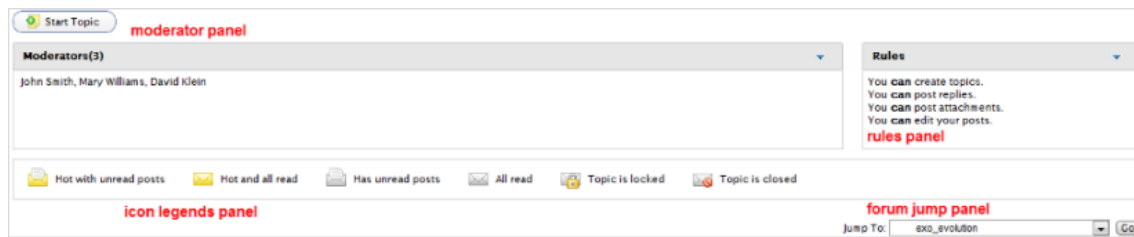
Simply select/deselect checkboxes of the components that you want to enable or disable.



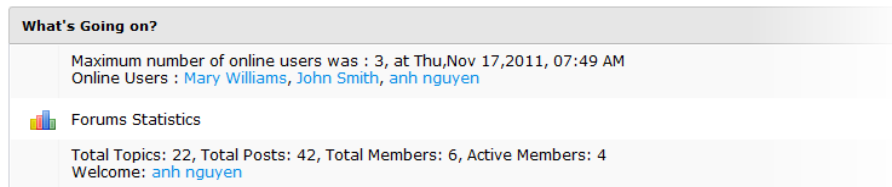
The following components can be enabled/disabled:

- 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:

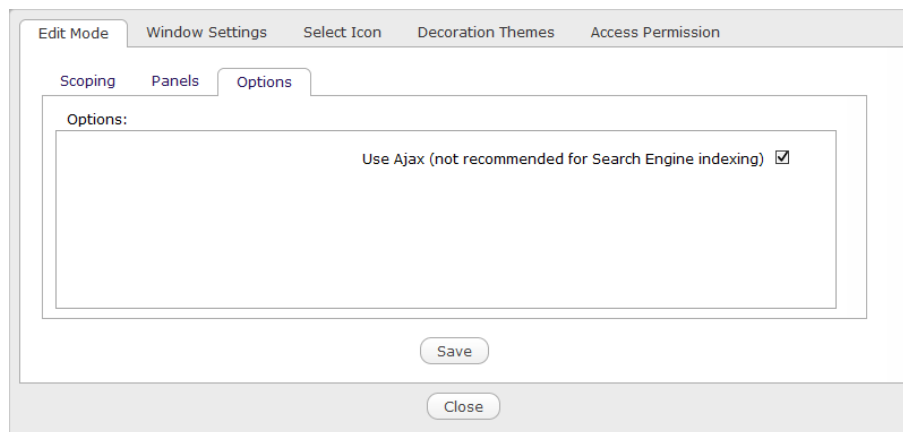


Forum Statistics



3.3.1.3. 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.

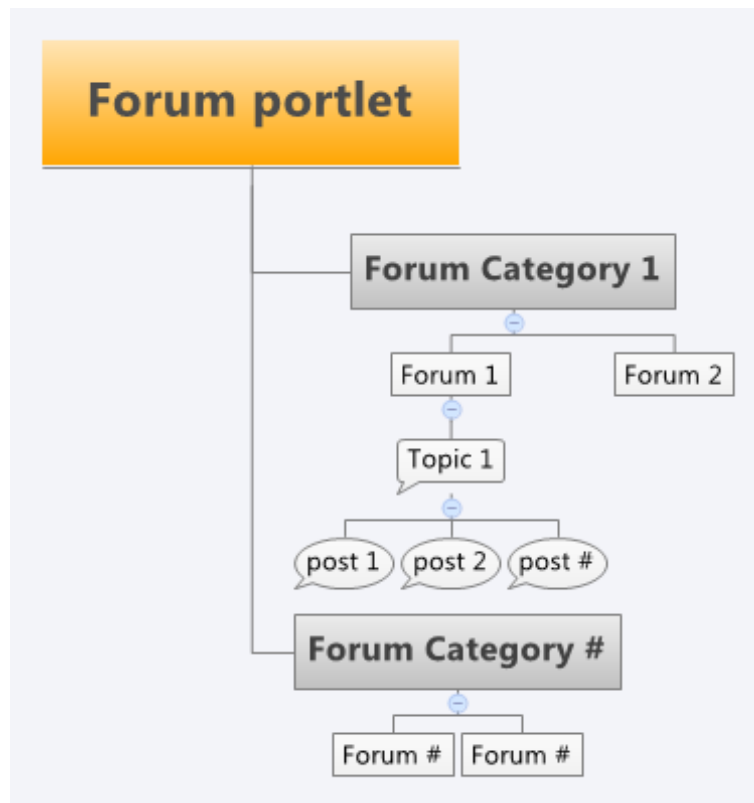


This feature defines how the links are generated in the **Forum** portlet. You can select to use Ajax or not.

- 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.

3.3.2. 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.



Managing categories can be performed through the following specific actions:

- [Add a new category](#)
- [Edit a category](#)
- [Delete a category](#)

3.3.2.1. 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  **Add Category** on the **Forum Administration** bar. The **Category** form will be displayed.

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

- Title:** A text input field containing "Manager zone" with an asterisk (*) indicating it is required.
- Order:** A text input field containing the number "0".
- Restricted Audience:** A large text area with a small icon of three people in the bottom right corner.
- Description:** A large text area containing the text "For Forum Administrators and Moderators only" with a small icon of three people in the bottom right corner.

At the bottom of the form are two buttons: "Save" and "Cancel".

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.

3.3.2.2. 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.

3.3.2.3. Delete a category

1. Select a category to delete from the **Forum** homepage, then click  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.



3.3.3. Manage forums

Managing forums can be performed through the following actions:

- [Add a new forum](#)
- [Delete a forum](#)

3.3.3.1. Add a new forum

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.

The screenshot shows a 'Forum' dialog box with a close button in the top right. Below the title bar, there is a label 'Add Forum to Category:' followed by a dropdown menu showing 'spaces'. Below this is a tabbed interface with three tabs: 'Add Forum' (selected), 'Moderation Options', and 'Permissions'. The 'Add Forum' tab contains the following fields: 'Title' (text input with 'News' and an asterisk), 'Order' (text input with '0'), 'State' (dropdown menu with 'Open'), 'Status' (dropdown menu with 'Unlocked'), and 'Description' (a large text area). At the bottom of the dialog are 'Save' and 'Cancel' buttons.

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
Moderators	The username of the moderators.
Auto-fill the moderator's email	Check this option if you want the moderator's email is auto-filled. The email address will be taken from in moderator profile.
Email addresses to notify when there is a new post	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 Auto-fill the moderator's email is checked.
Email addresses to notify when there is a new topic	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 Auto-fill the moderator's email is checked .
Moderate Topics	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.

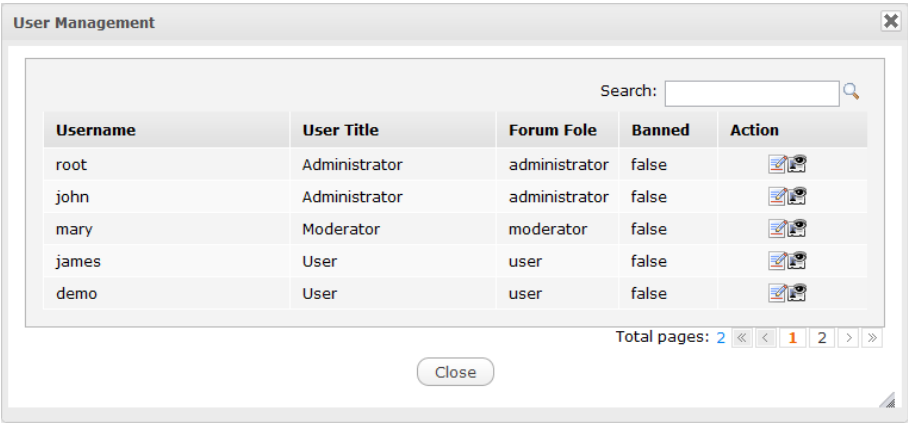
3.3.3.2. Delete a forum

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.

3.3.4. Manage users

To take this action, click  **Users** on the **Forum Administrator** bar. The **User Management** form will be displayed.



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.

3.3.4.1. Promote a user

The screenshot shows the 'Profile' tab of a user's settings. It includes fields for Username, Screen Name, User Title, Forum Administrator, Moderator of Categories, Moderator of Forums, and Signature. There are checkboxes for 'Display Signature' and 'Display Avatar'. The 'Save' and 'Cancel' buttons are at the bottom.

Profile Settings Ban User Topics Posts

Username: mary

Screen Name: Mary Williams

User Title: Moderator

Forum Administrator: ☐

Moderator of Categories: General Discussion

Moderator of Forums: Introduce Yourself, Caffeine Lounge, Industry News

Signature: If nothing ever changes, there'd be no butterflies

Display Signature: ☐ Display Avatar: ☒

Save Cancel

In the **Profile** tab, you can promote your selected user to an administrator or a moderator by editing the following fields:

Field	Description
Forum Administrator	Grant the Administrator role to a selected user or not. The Administration role of the default administrator cannot be edited in the User Management form.
Moderator of Categories	The list of categories moderated by the selected user. Click to select a category.
Moderator of Forums	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
Screen Name	The name displayed in Forum .
User Title	The title representing the role of user, by default. However, you can enter anything you want.

3.3.4.2. 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](#).

3.3.4.3. 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:

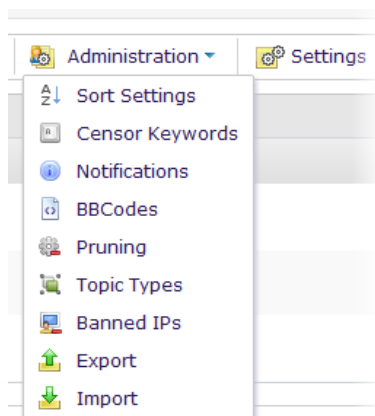
Field	Description
Duration	The interval during which the user will be banned. This field is only edited when you ban this user in the 'Banned' field. In the ban duration, the banned user only can view forums and topics but he/she cannot post replies or send messages.
Reason	The reason for banning this 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](#)

3.3.5. 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.

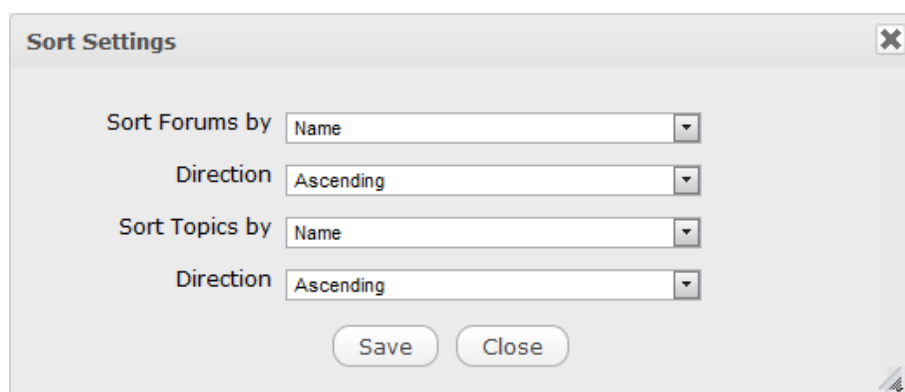


The administrative tasks include the following actions:

- [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](#)

3.3.5.1. 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**.

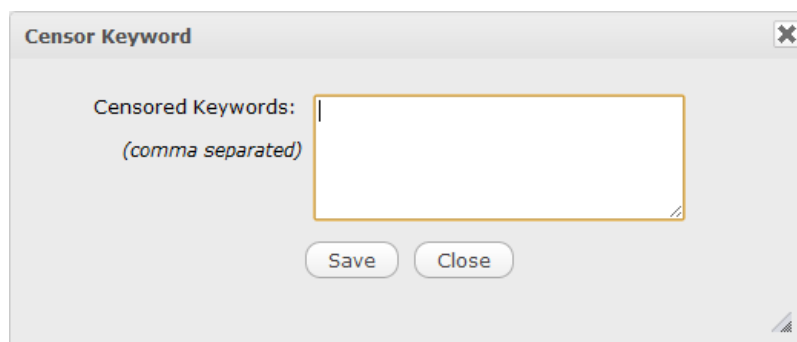
A screenshot of a 'Sort Settings' dialog box. It contains two sections: 'Sort Forums by' and 'Sort Topics by'. Each section has a dropdown menu for the sort criteria (both set to 'Name') and a dropdown menu for the sort direction (both set to 'Ascending'). At the bottom of the dialog are 'Save' and 'Close' buttons. The dialog has a title bar with a close button (X) and a maximize button.

- **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.

3.3.5.2. Define censored keywords

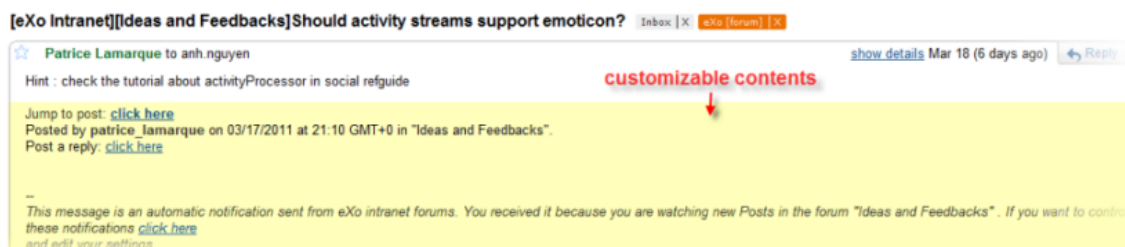
Censored keywords are those which are specified as inappropriate in the **Forum** application. If any topics or posts contain censored keywords, they will be hidden until being verified by Administrators or Moderators. Click  **Administration** on the **Forum Administration** bar and click **Censor Keywords** from the drop-down menu. The **Censor Keyword** form will be displayed.




Enter censored keywords in the **Censored Keywords** field. Keywords are separated by commas.

3.3.5.3. 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 screenshot shows a window titled "Notifications" with two tabs: "New Posts Notification" and "Moved Notification". The "Moved Notification" tab is active. It contains a checkbox labeled "Add a prefix to notifications" which is unchecked. Below it is a text field for "Notification Subject Template" with the value "[\$CATEGORY] [\$FORUM] \$TOPIC". Underneath is a rich text editor for "Content Notification". The editor's toolbar includes icons for bold, italic, underline, list, link, and other text formatting options. The content area of the editor displays a sample email notification template. The template starts with "Hi," followed by an explanation of the notification. It then states: "We would like to inform you that there is a new \$ADD_TYPE in the \$OBJECT_WATCH_TYPE \$OBJECT_NAME with the following content: \$POST_CONTENT". Below this, it says "At \$TIME on \$DATE, posted by \$POSTER ." and provides two links: "Go directly to the post: [Click here.](#)" and "Or go to reply to the post: [Click here.](#)". At the bottom of the window are "Save" and "Close" buttons.

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:

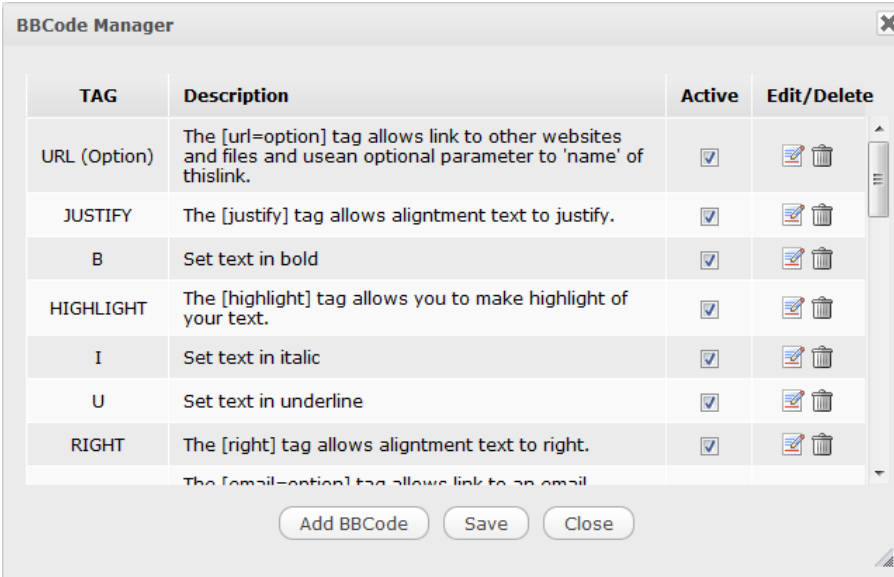
- **\$OBJECT_PARENT_NAME**: Will be replaced by the forum name (if moving topics) or the topic name (if moving posts).
- **\$OBJECT_PARENT_TYPE**: Will be replaced by the type of the moved parent object, such as forum (if moving topics) or topic (if moving posts).
- **\$OBJECT_NAME**: Will be replaced 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.

3.3.5.4. 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.



TAG	Description	Active	Edit/Delete
URL (Option)	The [url=option] tag allows link to other websites and files and usean optional parameter to 'name' of thislink.	<input checked="" type="checkbox"/>	 
JUSTIFY	The [justify] tag allows alignment text to justify.	<input checked="" type="checkbox"/>	 
B	Set text in bold	<input checked="" type="checkbox"/>	 
HIGHLIGHT	The [highlight] tag allows you to make highlight of your text.	<input checked="" type="checkbox"/>	 
I	Set text in italic	<input checked="" type="checkbox"/>	 
U	Set text in underline	<input checked="" type="checkbox"/>	 
RIGHT	The [right] tag allows alignment text to right.	<input checked="" type="checkbox"/>	 

Here, you can do the following actions:


- [Add a new BBCode](#)
- [Edit a BBCode](#)
- [Delete a BBCode](#)
- [Activate/Deactivate a BBCode](#)

3.3.5.4.1. 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.

3.3.5.4.2. 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

3.3.5.4.3. 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.

3.3.5.4.4. Activate/Deactivate a BBCode

Any BBCode can be activated/deactivated.

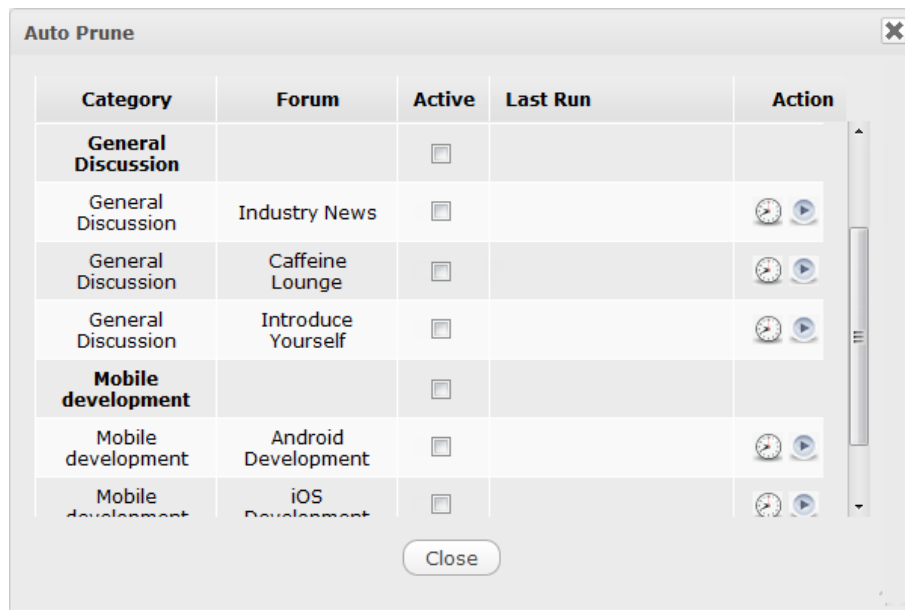
TAG	Description	Active	Edit/Delete
URL (Option)	The [url=option] tag allows link to other websites and files and use an optional parameter to 'name' of this link.	<input checked="" type="checkbox"/>	
JUSTIFY	The [justify] tag allows alignment text to justify.	<input checked="" type="checkbox"/>	

- 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.

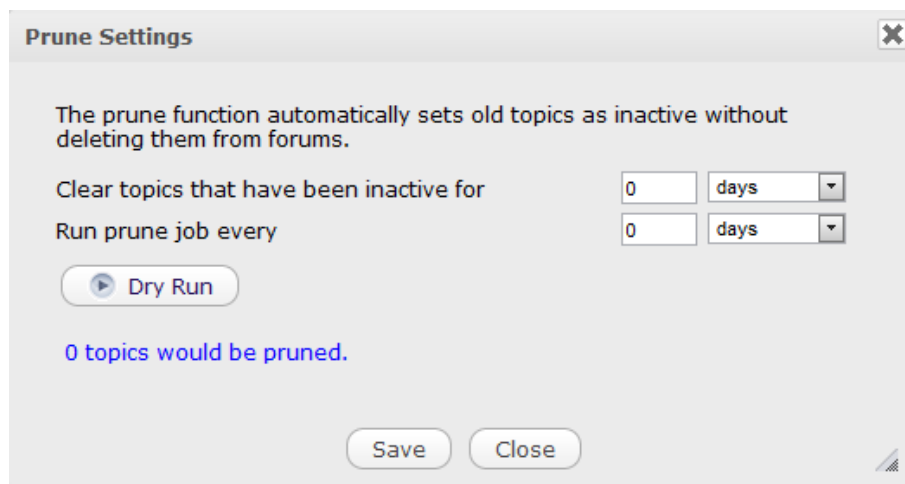
3.3.5.5. Set up auto-pruning

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.

3.3.5.6. 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?	0	☆☆☆☆☆
		New Nebula ROM - fast and furious	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
	Forum Announcement	
	Poll	
	News	
	Important	
	Resolved	
	Request	
	Discussion	

Add Topic Type
Close

The **Topic Type Manager** form lists all topic types and allows you to add new topic types, edit or delete the existing ones.

Add a topic type

1. Open the **Topic Type** form via one of two following ways:

- **The first way**

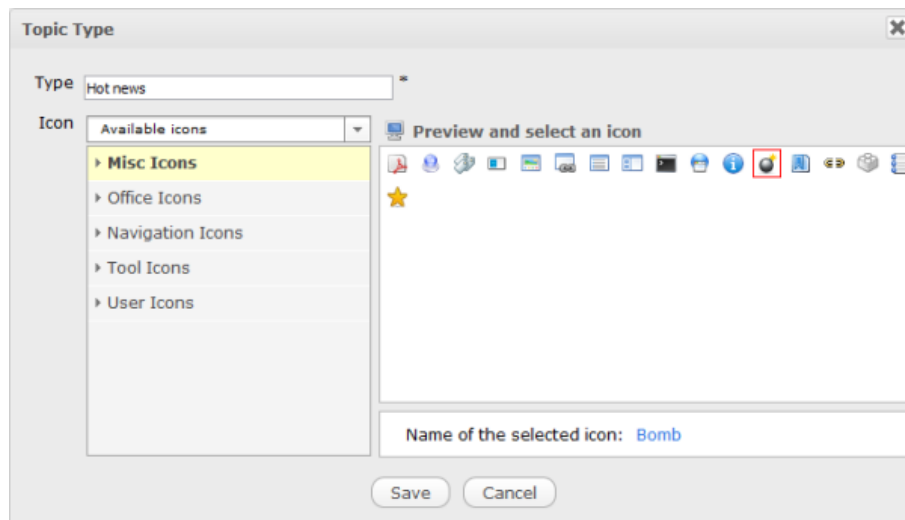
Click **Add Topic Type** in the **Topic Type Manager** form.

- **The second way**

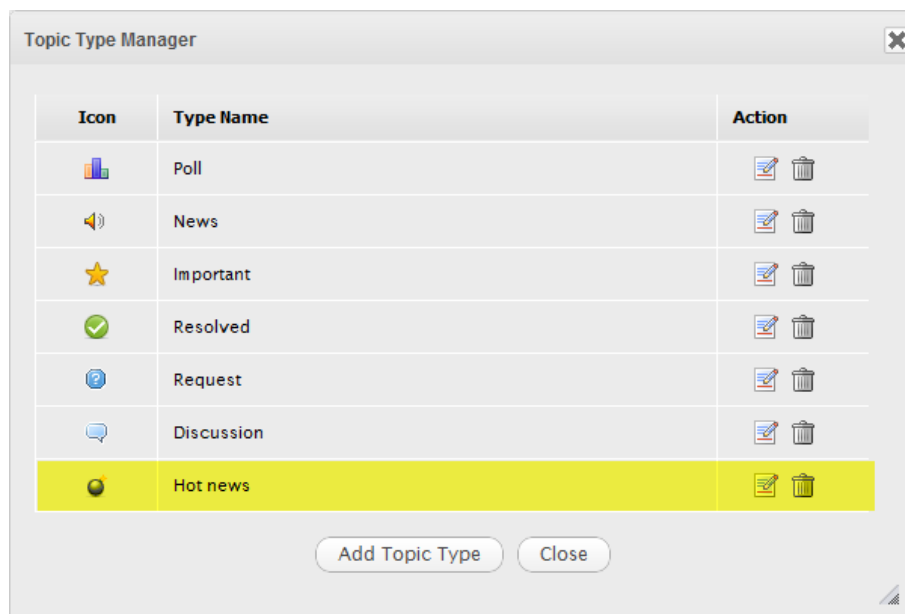
Click next to the **Type** field in the **Option** tab of the **New Topic** or **Edit Topic** form.

(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.

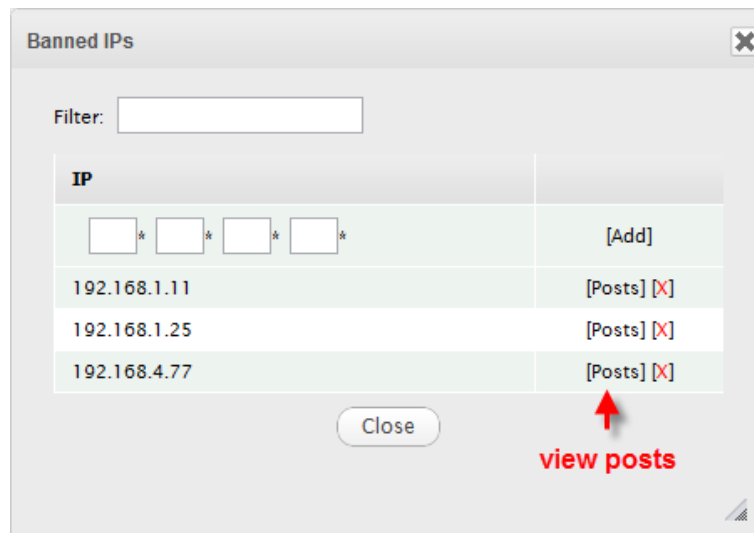


- To edit the topic type, click .
- To delete the topic type, click .

3.3.5.7. 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.


3.3.5.8. 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](#)

3.3.5.8.1. 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
File Name	Enter the name of the exported file.
Export All	Check this option to export all data in Forum , such as all categories, user profiles and forum statistics.
Only Categories	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**.

3.3.5.8.2. 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.

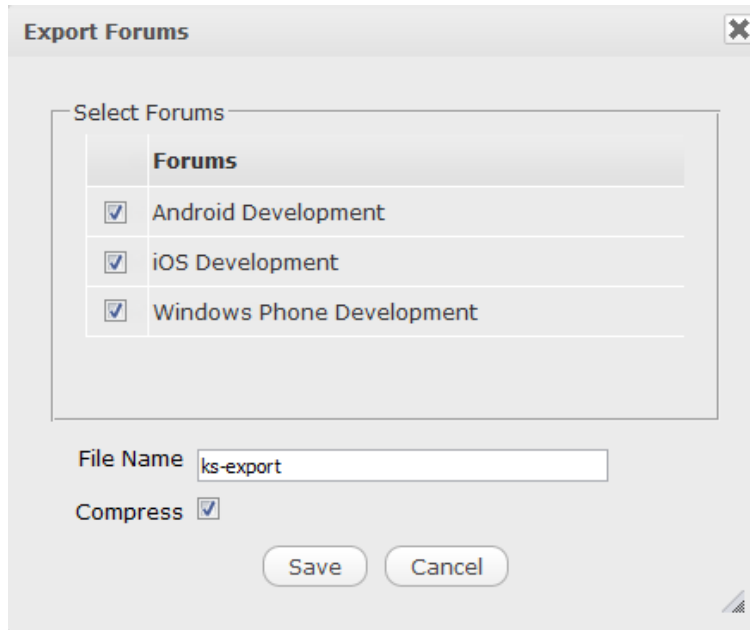
4. Tick the **Compress** checkbox to export the file into the .zip file or leave it blank to export into .xml file.

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, there 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:

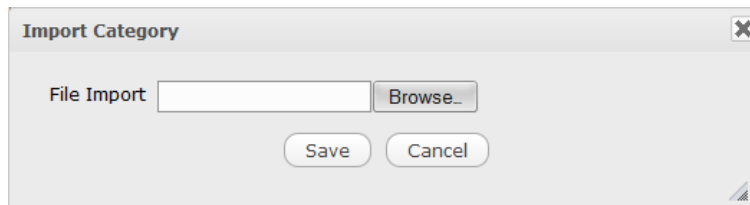
Compress: ☒

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.

3.3.5.8.3. 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 and 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**.

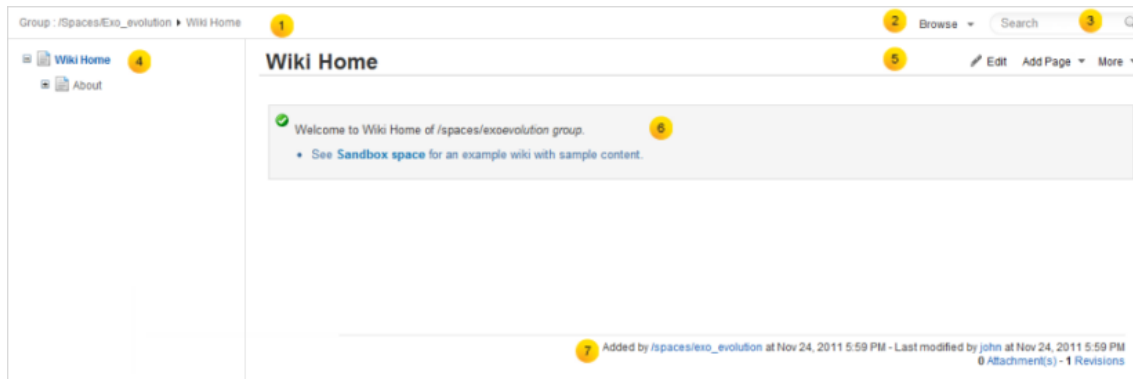
3.3.5.8.4. Import a forum

- 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.

How To Use Wiki?

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 Breadcrumb which shows the page hierarchy.
2	The Wiki administration area which allows administrators only to configure the space settings.
3	The Search box.
4	The pages tree view.
5	The Page Control area which helps users take actions with the current page.
6	The page content.
7	The page information. Click View Change to see changes in the latest versions. Click Attachment(s) and Revisions links to open the Attachments details pane and the Revisions 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.

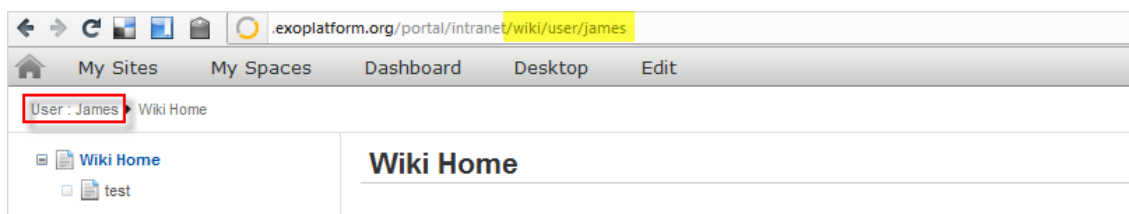
For example:



- **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.

4.1. 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.

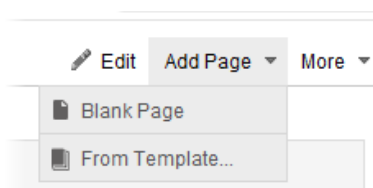
4.1.1. Create a page

There are two ways to create a page:

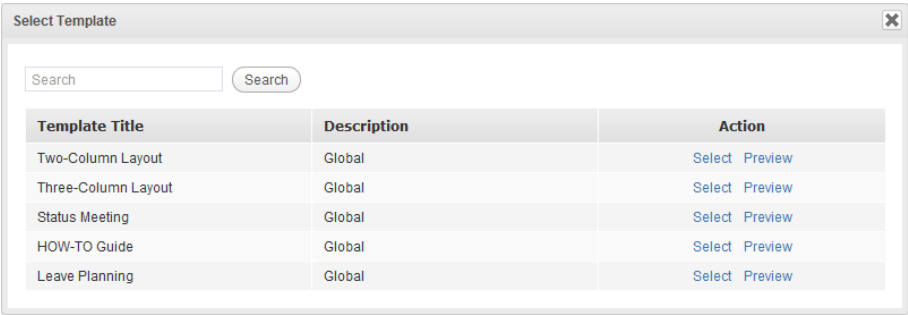
The first way

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.

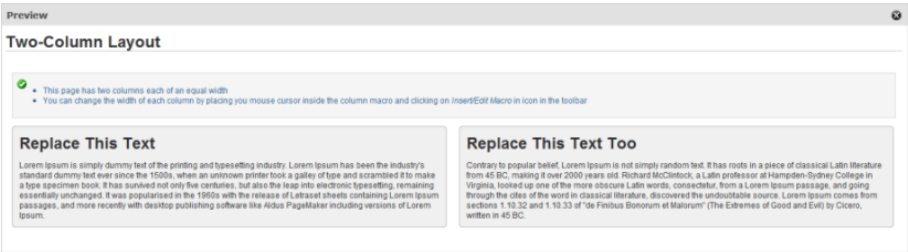


If you select **From Template...**, a list of available templates will appear.

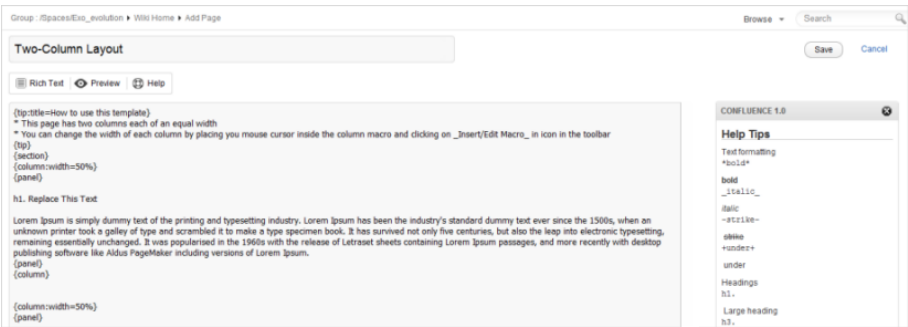


You can:

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]	eXo User Guide

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.

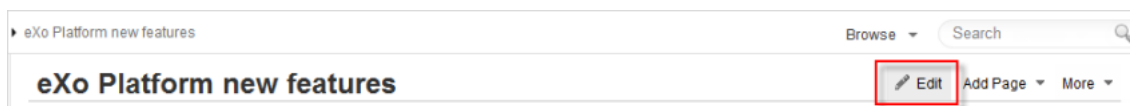
4. Follow the steps stated [above](#) to enter the page title, content and save the page.

4.1.2. Edit a page

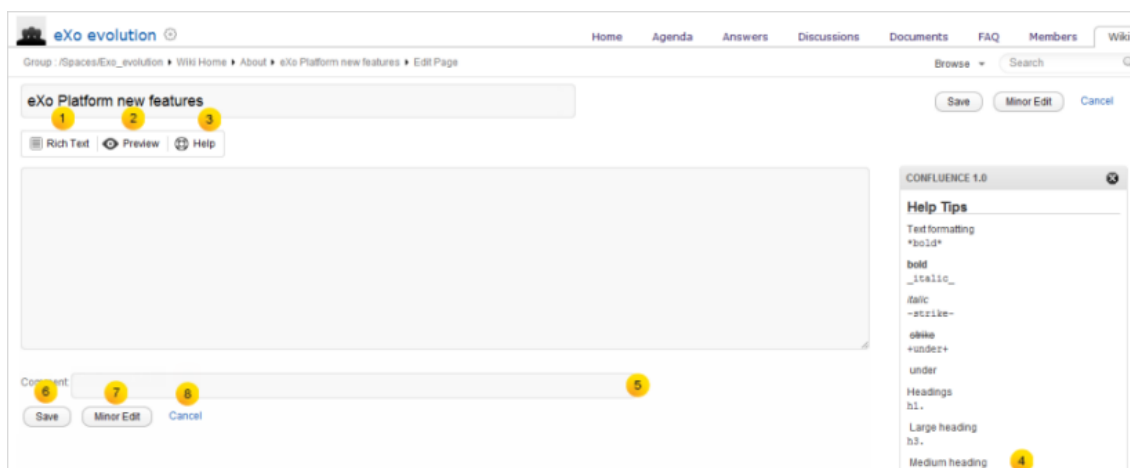
You can edit a page at any time if you have the **Edit** permission on that page.

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.

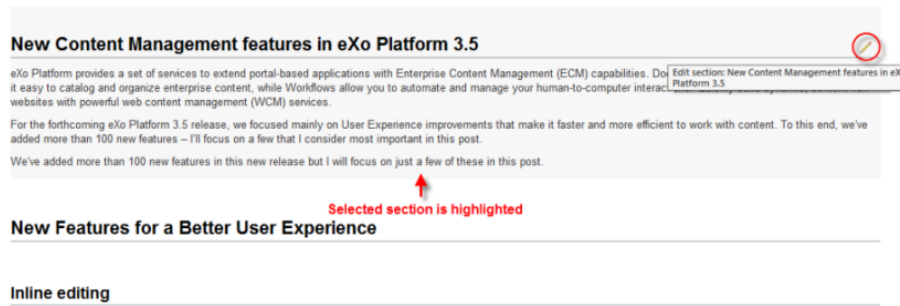


Details:

Item	Description
1	Switch to the Rich Text (WYSIWYG) 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 View 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.

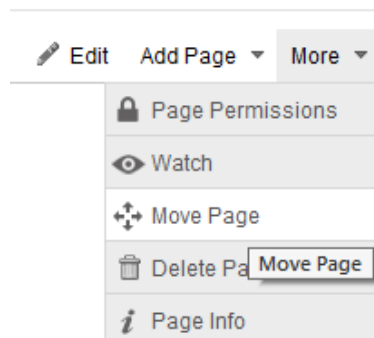


Tip

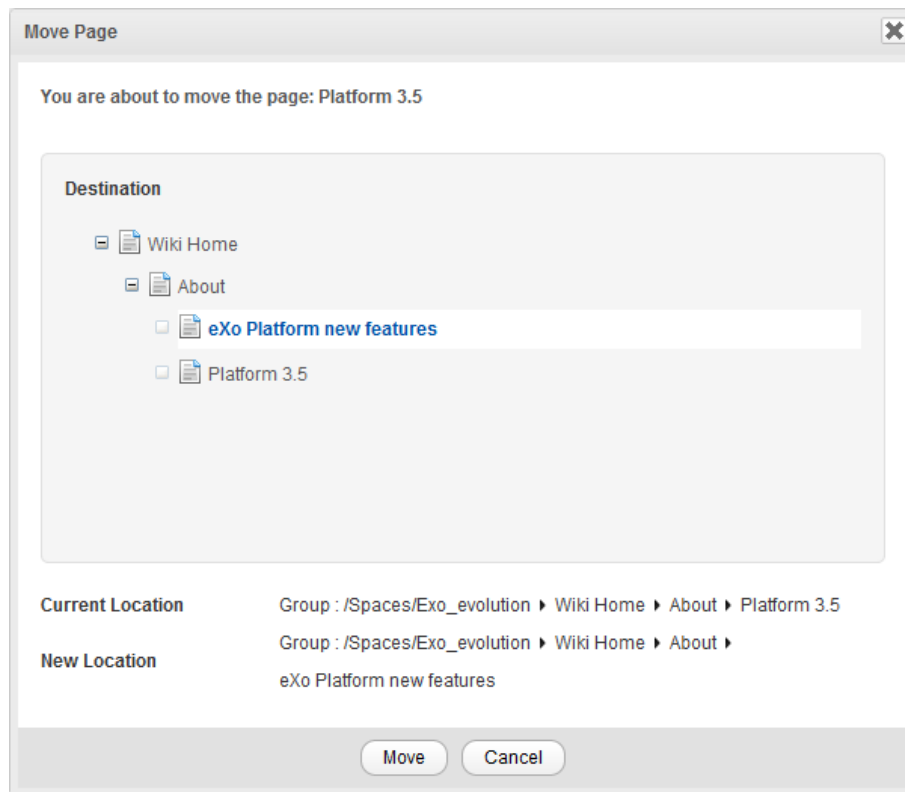
In the **View** mode, you can quickly edit the page title by double-clicking it, then press **Enter** when finishing.

4.1.3. 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**.

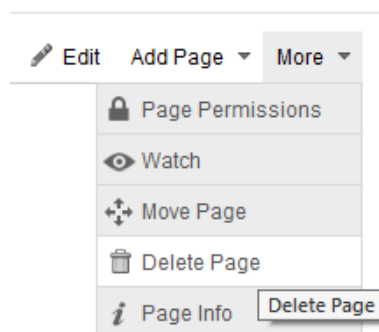


Note

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.

4.1.4. 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.

4.1.5. 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	eXo Platform new features	
Author	john	Nov 24, 2011 6:10 PM
Last Changed by	john	Nov 24, 2011 6:10 PM

Related Pages		
Wiki	Related Pages	Actions
group	Group : /Spaces/Exo_evolution ▶ Wiki Home ▶ About ▶ Platform 3.5	Remove
Add More Relations		

Hierarchy		
Parent Page		
→ About		
Child Pages		

Recent Changes		
Time	Editor	
CURRENT (v. 1)	john	
View Page History		

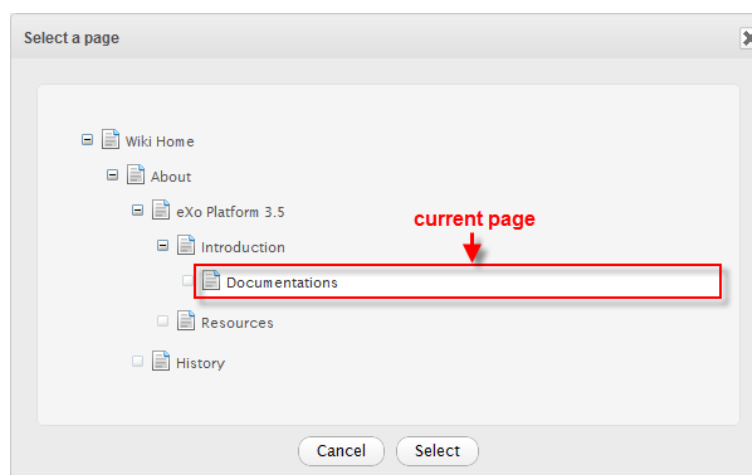
Here, you can do the following actions:

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

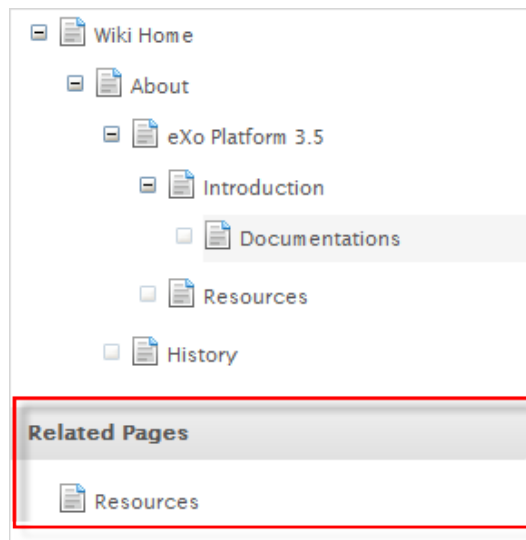
4.1.5.1. Add a related page

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**.



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



4.1.5.2. 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:

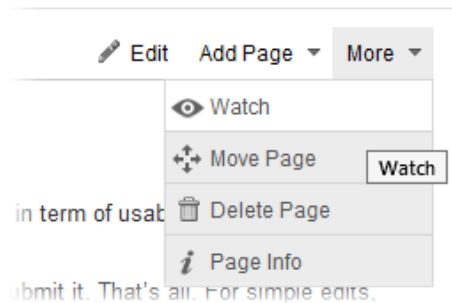
Item	Function
1	Compare selected page versions.
2	Allow you to select two versions that you want to compare.
3	Allow you to specify the version labels of the page and link to view a specific version.
4	The date and time when the page is changed.
5	The authors who make changes of the page.
6	The reasons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

4.1.6. Watch a page

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

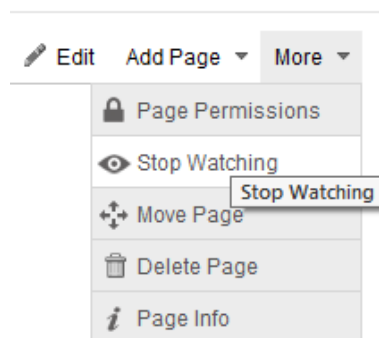
Watch a page

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.



4.2. Work with attachments

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

4.2.1. 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			Delete the attachment
File	Creator	Last Update	
DavidKlein_Brading_Designer.jpg	John Smith	Nov 24, 2011 6:22 PM	
FernandoFelipe_-_Human_Resource_Manager.jpg	John Smith	Nov 24, 2011 6:22 PM	
GabrielPascal_-_Web_Developer_.jpg	John Smith	Nov 24, 2011 6:28 PM	
Upload New File			

Click the file title to download

Here, you can:

- Download an attachment by simply clicking the attachment name.
- Delete an attachment by simply clicking .

4.2.2. 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.

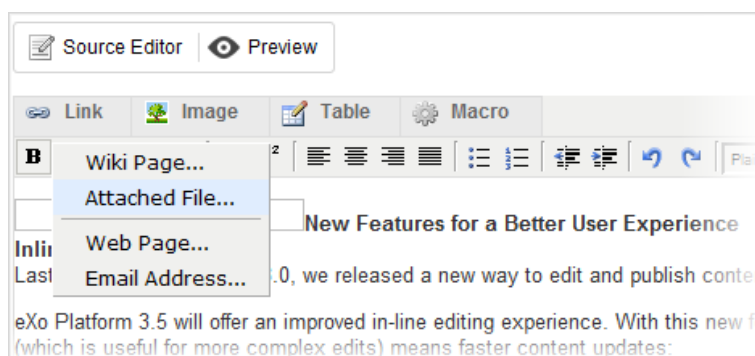
The second way

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

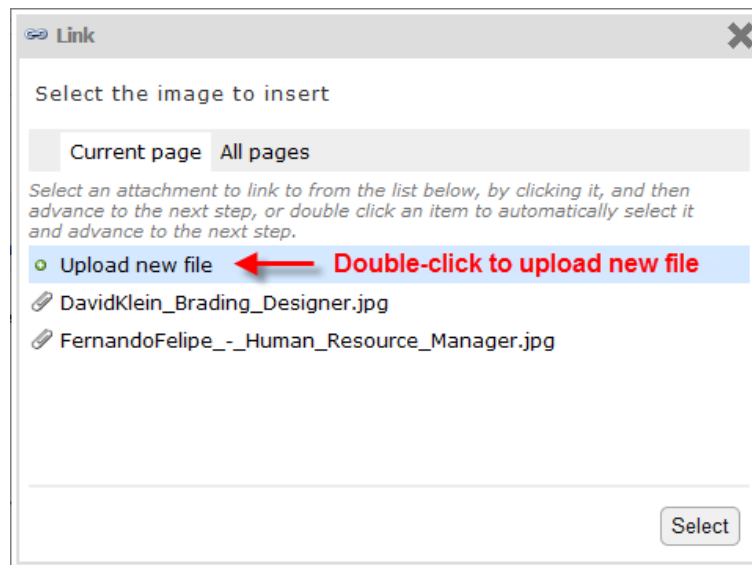
1. Select a page to which you want to add an attachment.
2. Select **Edit** at the **Page Control** area. For more details, see the [Edit a page](#) section.
3. Select the **Rich Text** editor on the page toolbar.



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.

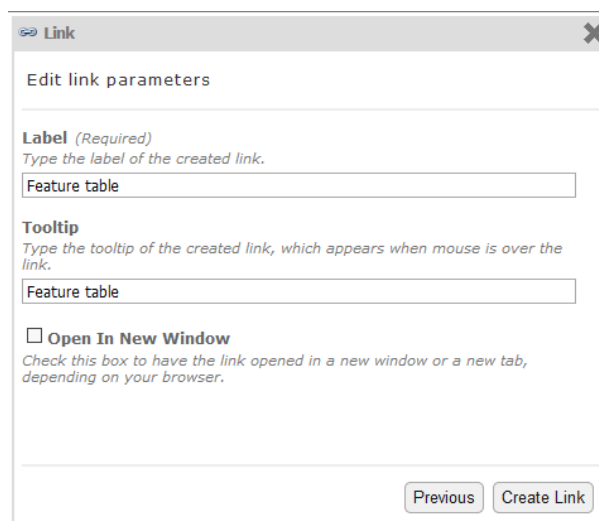
- **Upload a new file:**

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.

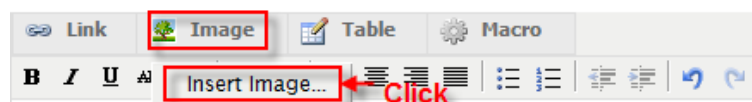


6. Provide the link label and tooltip.

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

4.2.3. Insert an image

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




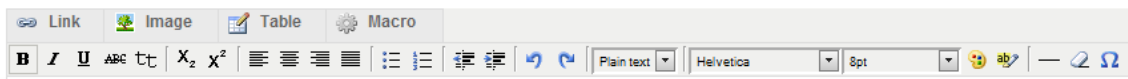
2. Select an inserted image of the current page, or click the **All Pages** tab to select an image attached to another page in the space.
3. Click the **Insert Image...** button.

4.3. 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

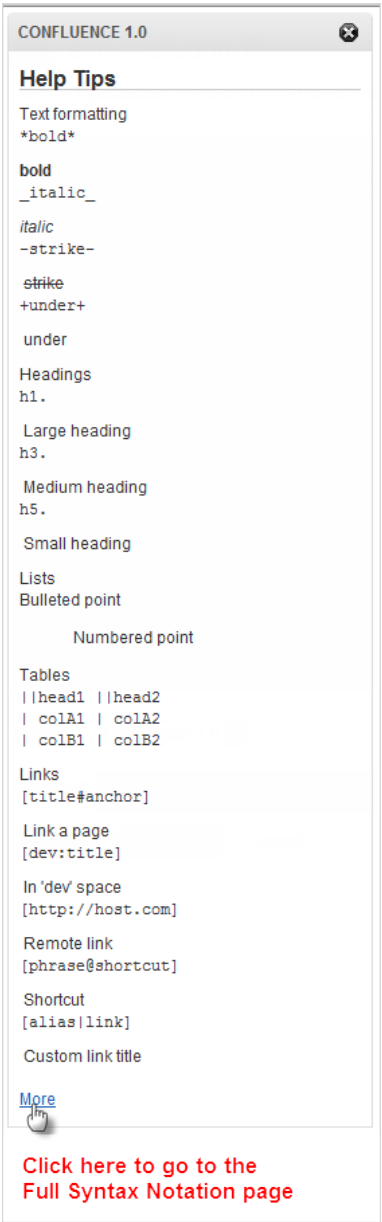
If the final result is not similar to what you wish when editing a page by the **WYSIWYG** editor, you can go back to the **Source** editor and use **Wiki** markups to edit the content.

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](#).

4.4. 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.

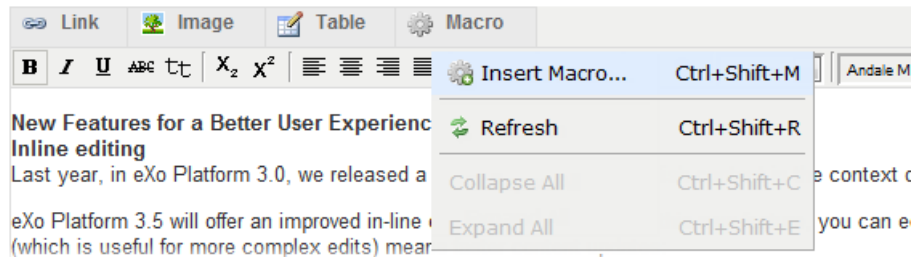
Example of emoticons and icons

Notation	:)	:(:P	:D	:)	(y)	(n)	(i)	(/)	(x)	(!)
Image											
Notation	(+)	(-)	(?)	(on)	(off)	(*)	(*r)	(*g)	(*b)	(*y)	
Image											

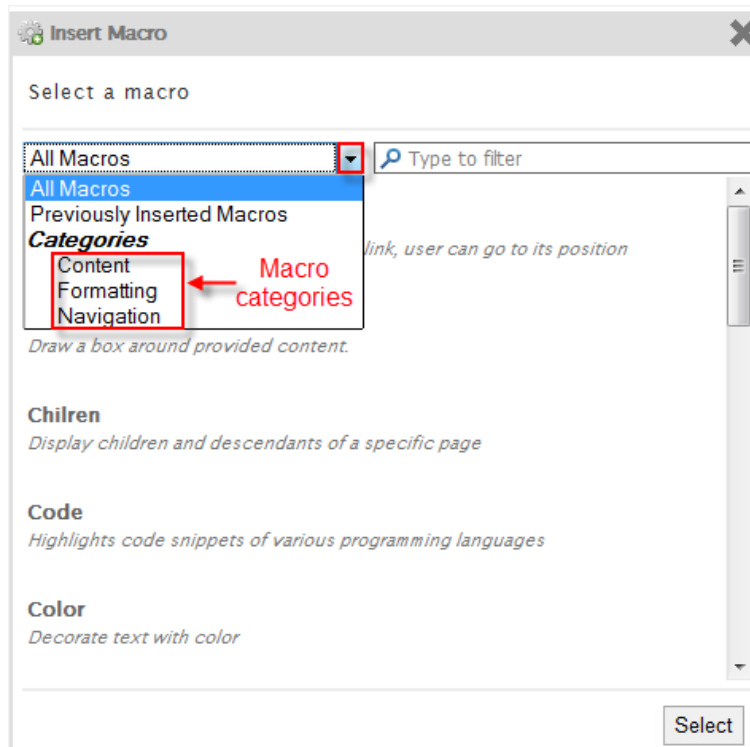
4.5. Work with Macros

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.

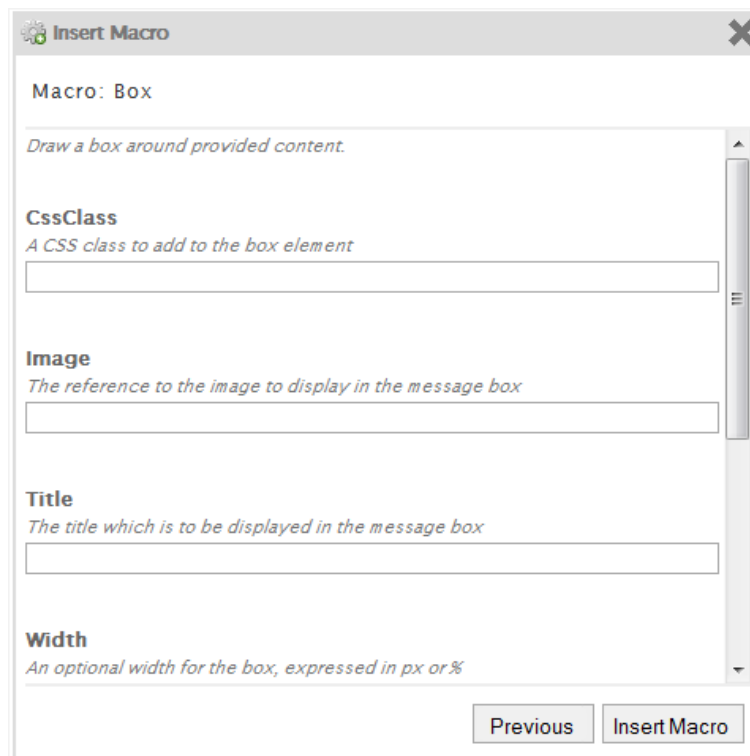


The **Insert Macros** form appears.



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.



The screenshot shows a window titled "Insert Macro" with a close button (X) in the top right corner. Inside the window, the "Macro" is set to "Box". Below this, there is a description: "Draw a box around provided content." followed by a vertical scrollbar. The next section is "CssClass" with the description "A CSS class to add to the box element" and an empty text input field. The "Image" section has the description "The reference to the image to display in the message box" and an empty text input field. The "Title" section has the description "The title which is to be displayed in the message box" and an empty text input field. The "Width" section has the description "An optional width for the box, expressed in px or %" and an empty text input field. At the bottom right, there are two buttons: "Previous" and "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
Excerpt	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.
Include Page	Include the content of another page in the current page.
Box	Draw a box around the provided content.
Color	Change the text color.
Code	Highlight code snippets of various programming languages.
Error Message	Display an error message note.
Float	Allow content to 'float' on the left or the right.
Info Message	Display an info message.
No Format	Keep the content displayed like you type.
Note Message	Display a note message.
Panel	Embrace a block of text within a fully customizable panel.
Table	Inset a table.
Table cell	Insert a table cell.
Table row	Insert a table row.
Tip Message	Display a tip message block.

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

4.6. 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).

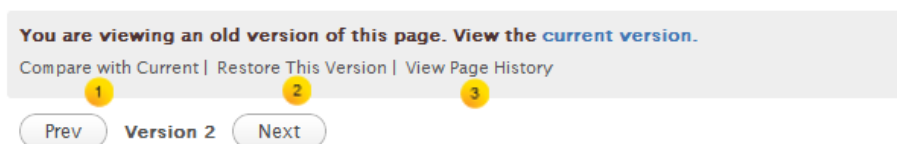


Note

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.

4.6.1. 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**.

4.6.2. 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

Compare Selected				
	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, Branding Designer, jpaillereau.com"~~ **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://pailiereau.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://pailiereau.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.

4.6.3. 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.

4.7. 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 Wiki 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>.

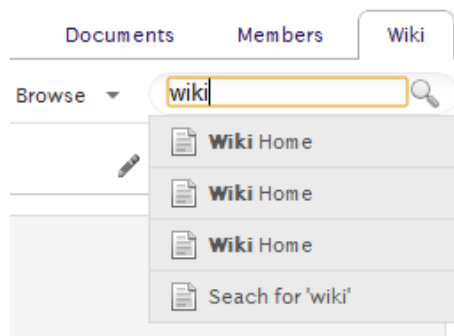
4.8. Search

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

- [Quick Search \[112\]](#)
- [Advanced Search \[113\]](#)

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.

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**.

4.9. 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.

4.9.1. Access your workspace using WebDAV

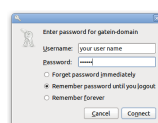
To access any workspaces of your repository, you can use the following URL format:

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

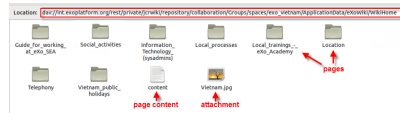
For example, to access the Wiki Home of the "exo vietnam" space, enter the following URL in the address bar of your OS's explorer (Nautilus is used in this example):

Location: dav://192.168.1.100:8080/rest/jcrwiki/collaboration/Groups/spaces/exo_vietnam/jgplatoronda/monk/home

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.

4.9.2. 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.

4.10. Wiki Administration



Note

This section is for administrators only.

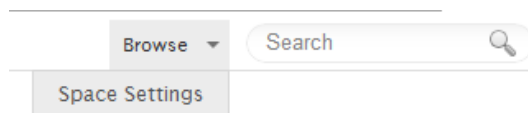
The administrator has the highest right in **Wiki**. The administrator can delete a page, change the space settings, set the Edit permission for users and more.

4.10.1. Set up space settings

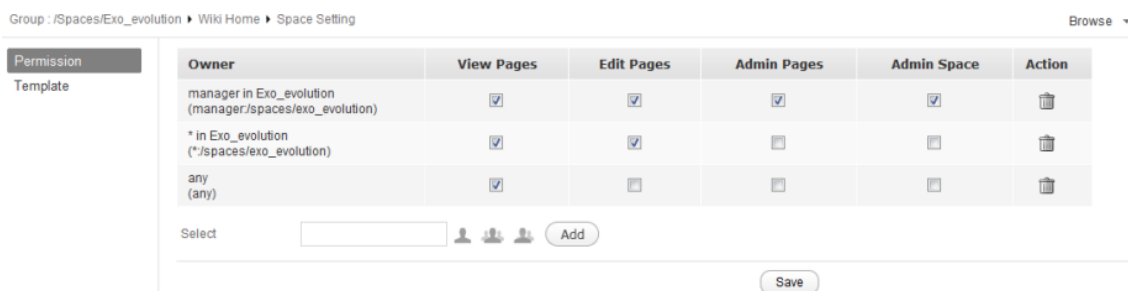
For each space, you can manage page templates.

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](#)

4.10.2. 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](#)

4.10.2.1. 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.

Group : /Spaces/Exo_evolution ► Wiki Home ► Space Setting Browse ▾

Permission

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

Select

Select User/Group/Membership to add

There are some permissions on a space as follows:

Permission	Description
View Pages	Specify who can view and watch pages of this space, its attachments and history.
Edit Pages	Specify who can edit pages of this space.
Admin Pages	Specify who have the administration rights on pages of this space.
Admin Space	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.](#)

4.10.2.1.1. 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.

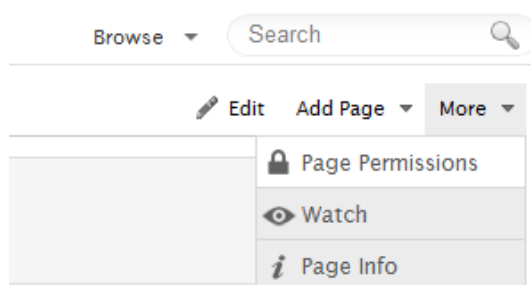
4.10.2.1.2. Delete space permissions

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.

4.10.2.2. 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.

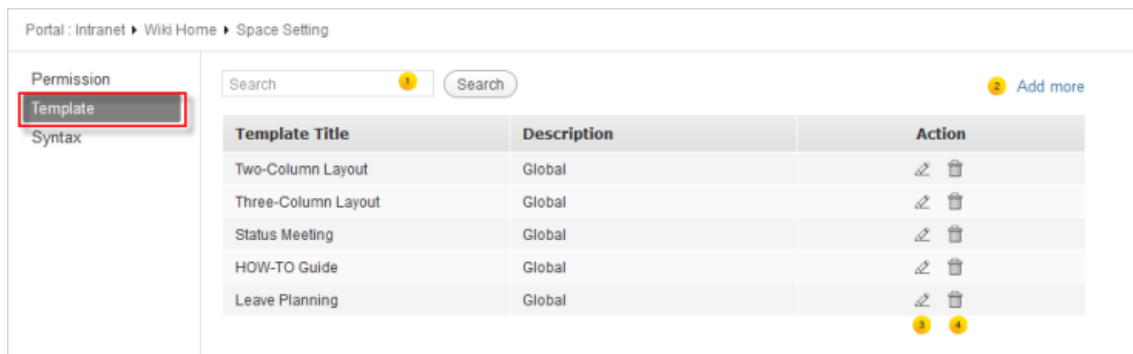
A **Page Permissions** action appears in the page action menu when the user has the **Admin Pages** permission.

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](#).

4.10.2.3. 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.



Here, you can:

- Search for a template 1
- Create a new template 2
- Edit a template 3
- Delete a template 4

4.10.2.3.1. 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".

4.10.2.3.2. Create a new template

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

Sample Template Title...

Description...


Preview 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.

4.10.2.3.3. 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.

4.10.2.3.4. Delete a template

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