



# eXo Social User Guide

Version 1.1

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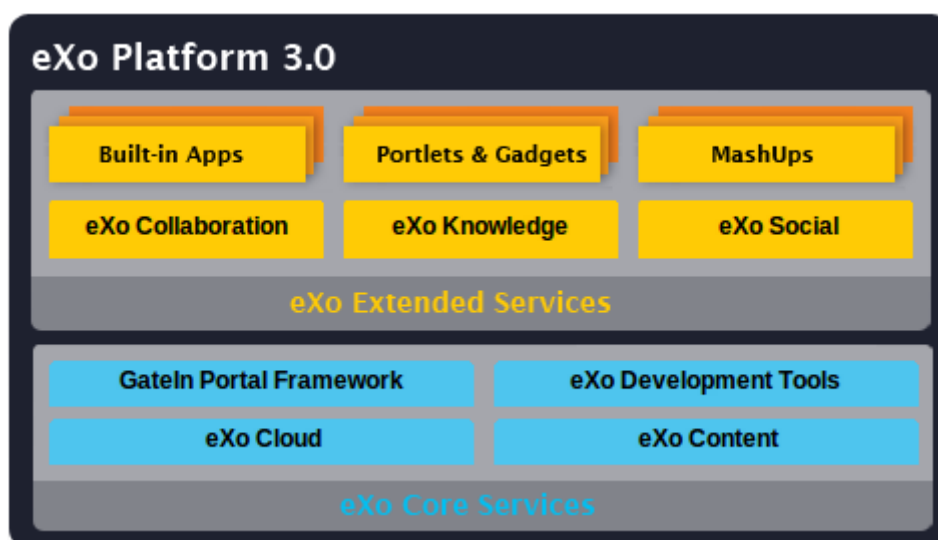
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# 1 Preface

## 1.1 Overview

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

The eXo Platform™ software is a powerful Open Source corporate portal and content management system. Users of the platform have a customized single point of access to the company's information system and resources.



Developed on eXo Platform 3.0, eXo Social is one of eXo Extended Services that provides a social network with much more features to share, and communicate between individuals and organizations. With eXo Social, it is easy to approach many easy-to-use social networking applications and more.

## 1.2 Why uses eXo Social

With eXo Social, users can do many actions with outstanding benefits such as:

- **Write Social Gadgets intuitively and easily:** eXo Social provides built-in JavaScript client

libraries for OpenSocial API so developers can easily leverage data produced by social-enabled applications to build mashups.

- **Offer Rich Experience to Existing Applications:** eXo Social provides end-users with features that are similar to social networking sites Facebook and LinkedIn, etc, allowing users to establish more meaningful connections and improve communication and collaboration.
- **Turn Company Directory into a Social Network:** eXo Social provides users with the ability to add details to their profiles, like experience, skill and team information and to establish connections based on defined and relationships.
- **Extend an Enterprise Social Network Easily:** Built-in applications and other Extended Services can be added to collaboration features within eXo Social network, providing many capabilities like Calendar, Address Book, Chat, Email and more.

## 1.3 About this document

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

The information provided in the guide has been arranged into such a way that ensures readers to search and implement them quickly. Initialized with the **Glossary**, the guide will give basic terms used in eXo Social. The next named "**People: Enterprise Social Networking**" will represent most of steps necessary to use the **People** application, one of the most important parts in Social. Users will also experience the **Spaces** application in the section named "**Space: Community Management**". With the aim of helping users better understand eXo Social, we offer some references and resources in the **Conclusion** section.

The guide can be widely used for everyone interested in learning and using Social application, especially for normal users who apply eXo Social with **People** and **Spaces** applications in work and business.

## 1.4 References & Related documents

### Information

- [eXo Home Page](#)
- [eXo Wiki](#)

## Support

- [Forums](#)
- [FAQ](#)

## 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 and more](#)

## 2 Glossary

### 2.1 Social network

**Social network** is not a new concept. It can be your diary, address book, or news, instant messages, conversations, and more. It combines many applications to make an easy connectivity among users. eXo Social mainly focuses on creating a favorable interaction for companies.

### 2.2 People

**People** is an application used to add profile information, connections among users. With **People**, profile information and relationships can be managed and customized easily.

### 2.3 Profile

**Profile** is a set of information which can be entered and supplemented by users. This feature can improve the company directory's usability, such as basic information, avatars, experiences, contacts, and more.

### 2.4 Connections

**Connections** is to display information related to connections among users, including established connections, incoming and outgoing invitations.

### 2.5 Request

**Request** is the act of asking or expressing a connection desire that can be accepted and/or denied by receivers and sending requests also can be cancelled by users.

### 2.6 Activity

**Activity** is an application where users can do many actions such as publishing their own respective activity stream, showing recent activities or updates, new connections or updating status and more.

## 2.7 Space

**Space** is a working environment which can be created easily. With **Spaces**, users and communities will be managed more conveniently. It helps regrouping people by various interests or projects and leverages any existing application, such as portlets or gadgets to enable a collaborative work.

## 2.8 Space manager

**Space manager** is a user with special rights within a space. He can manage the list of members, configuration and installation applications. When a user creates a space, he/she automatically becomes the space's manager who can validate space subscription requests.

## 2.9 Different visibility options for a group

- **Visible:** The space is always visible.
- **Hidden:** The space is not visible in the space list.

## 2.10 Different registrations for a group available

- **Open:** The user can join a space without any validation.
- **Validation:** The user's membership has to be *validated* by a space manager.
- **Close:** The user cannot request for joining, but only the space manager can invite him.



## 3 People: Enterprise Social Networking

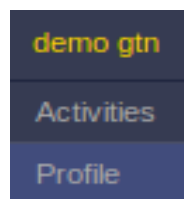


Before using the eXo Space, you should have basic knowledge about GateIn. Before reading further, you need to learn how to login and navigate in GateIn.

### 3.1 Update profile

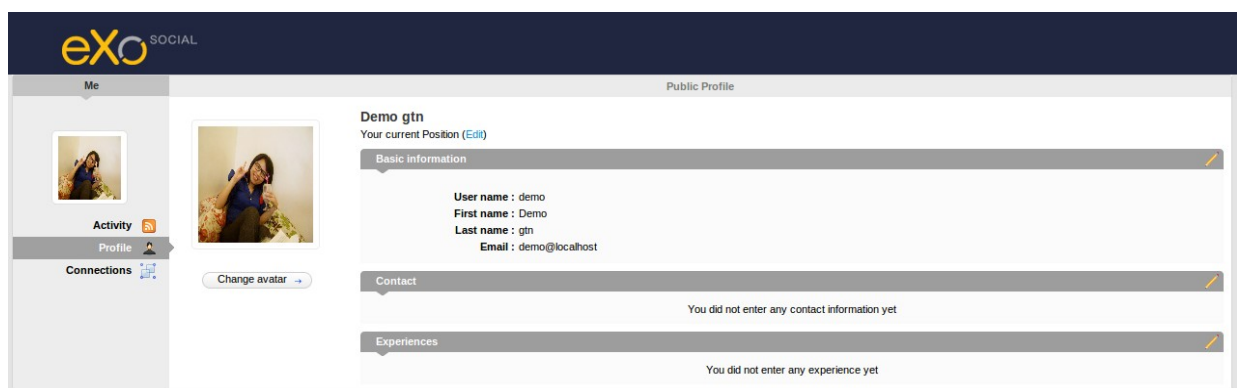
By default, the profile is just initialized with basic account information entered in the Registration form. You can complete your profile with more detailed information in **Position**, **Contact**, **Experiences**, and **Avatar**.

To go to **Profile**, hover your mouse over the display user name (e.g, demo gtn) on the Administration bar and select **Profile**.



Or, click **Activities**, then select **Profile** in the left pane.

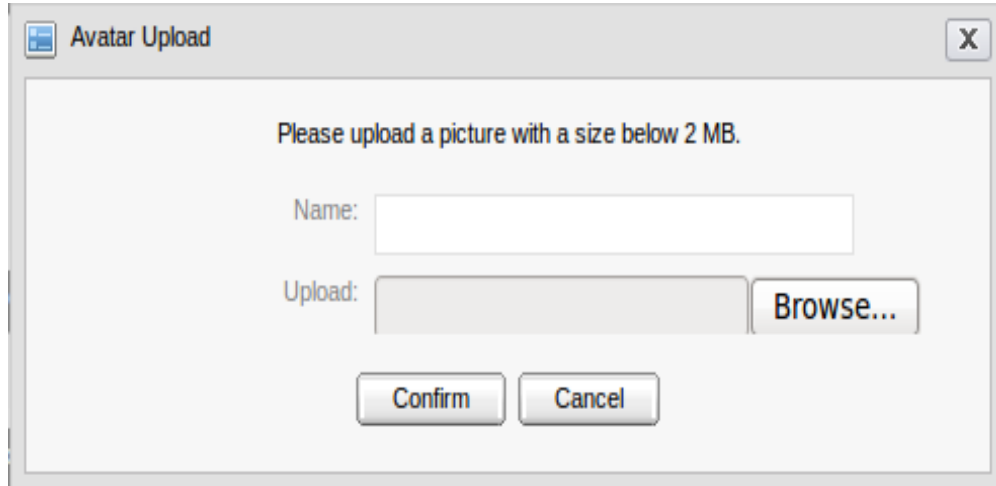
The **Profile** page will be displayed as below:



### 3.1.1 Change avatar

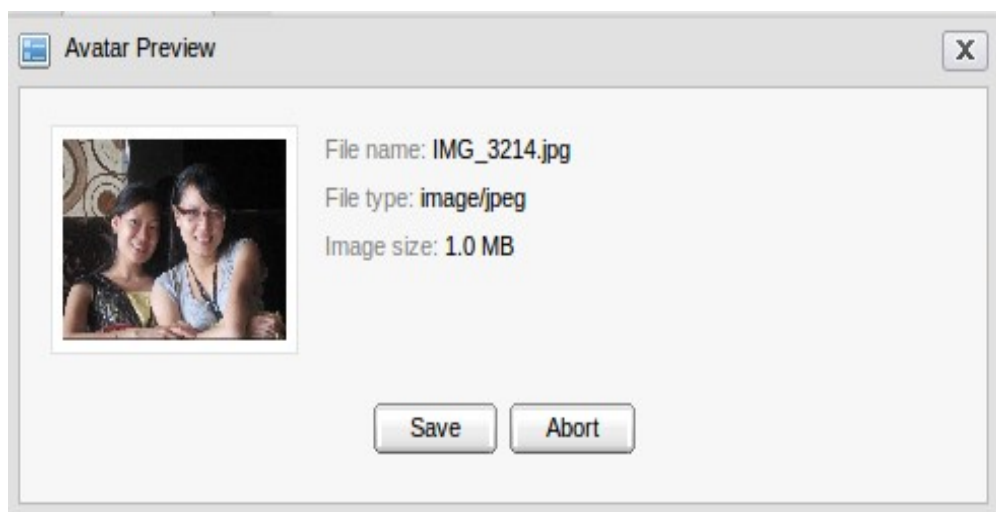
You easily change your avatar by following these steps:

**Step 1:** Click **Change Avatar** to open the **Avatar Upload** form:

A screenshot of the 'Avatar Upload' dialog box. The title bar says 'Avatar Upload' with a close button (X). The main area contains the text 'Please upload a picture with a size below 2 MB.' Below this is a 'Name:' label followed by a text input field. Underneath is an 'Upload:' label followed by a file selection area with a 'Browse...' button. At the bottom are 'Confirm' and 'Cancel' buttons.

**Step 2:** Click **Browse** to open the folder containing image which you want to upload and select that image. The uploaded photo must not be bigger than 2MB.

**Step 3:** After uploading, click **Confirm** to open the **Avatar Preview** form and some related information such as: file name, file type and image size.

A screenshot of the 'Avatar Preview' dialog box. The title bar says 'Avatar Preview' with a close button (X). On the left is a preview of the uploaded image showing two women. To the right of the image, the following text is displayed: 'File name: IMG\_3214.jpg', 'File type: image/jpeg', and 'Image size: 1.0 MB'. At the bottom are 'Save' and 'Abort' buttons.

**Step 4:** Click **Save** to accept or **Abort** to quit without saving.

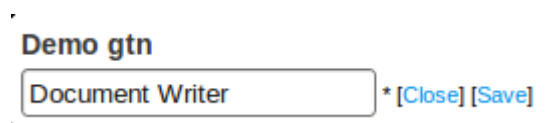
### 3.1.2 Change current position

To change the current position, do as follows:

**Step 1:** Click **Edit**.




The form to update the current information will appear:

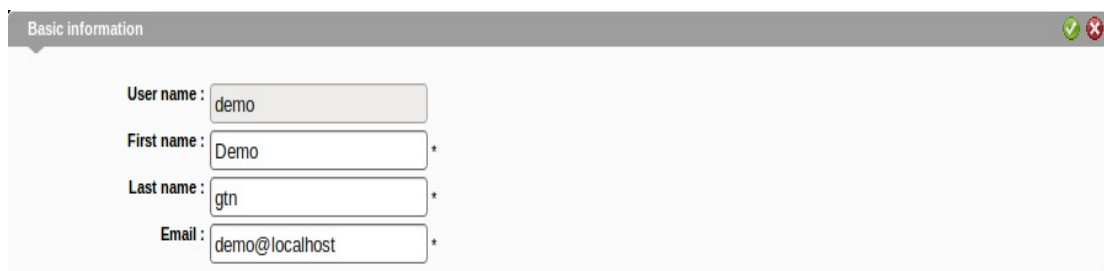


**Step 2:** Enter your new position and click **Save**. It will immediately update your current position.




### 3.1.3 Change basic information

To change basic information, do as follows:

**Step 1:** Click the icon  to edit basic information. The **Account Profile** tab will appear:

A screenshot of a 'Basic information' form. The form has a title bar with 'Basic information' and two icons (a green checkmark and a red X). The form contains four input fields: 'User name' with the value 'demo', 'First name' with the value 'Demo', 'Last name' with the value 'gtn', and 'Email' with the value 'demo@localhost'. Each of the last three fields has a small asterisk '\*' to its right.


**Step 2:** Change information related to your account.

**Step 3:** Click the icon  to accept all changes or  to delete these input information. After you have clicked , a message which informs the successful account information update will display.

**Step 4:** Click **OK**, or the icon  to quit the form after changing.


### 3.1.4 Change contact information

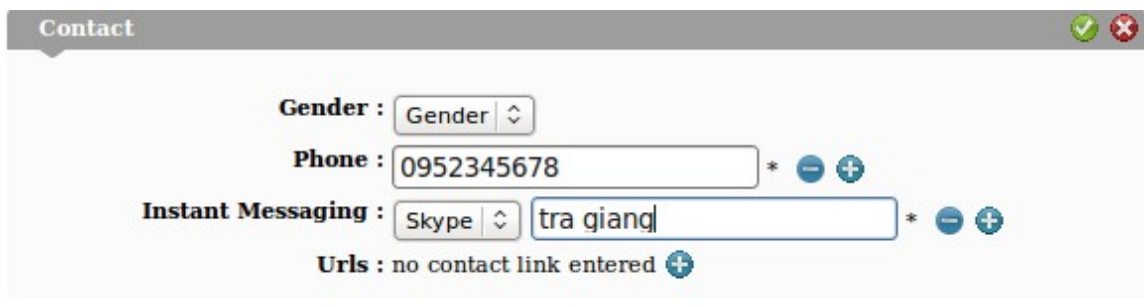
To change contact information, do as follows:

**Step 1:** Click the icon  that corresponds to the **Contact** pane. The form to edit contact information will display:

A screenshot of a web form titled "Contact" with a close button (X) in the top right corner. The form contains four fields: "Gender" with a dropdown menu showing "Gender", "Phone" with the text "no phone number entered" and a plus icon, "Instant Messaging" with the text "no IM handle entered" and a plus icon, and "Urls" with the text "no contact link entered" and a plus icon.

**Step 2:** Select a value for the **Gender** field.


**Step 3:** Click the icon  corresponding to one field you want to update: **Phone**, **Instant Messaging** and **Urls**.

A screenshot of the "Contact" form with data entered. The "Gender" dropdown shows "Gender". The "Phone" field contains "0952345678" and has a plus icon. The "Instant Messaging" field contains "Skype" and "tra giang" and has a plus icon. The "Urls" field contains "no contact link entered" and has a plus icon.

**Step 4:** Click  to save all changes or  to close this form without any change.

### 3.1.5 Change experiences



To change **Experiences**, do as follows:

**Step 1:** Click the edit icon  that corresponds to the **Experiences** pane. The edit form will be displayed.

**Step 2:** Click the icon  to open the detailed form that allows you to enter information

related to your experience.

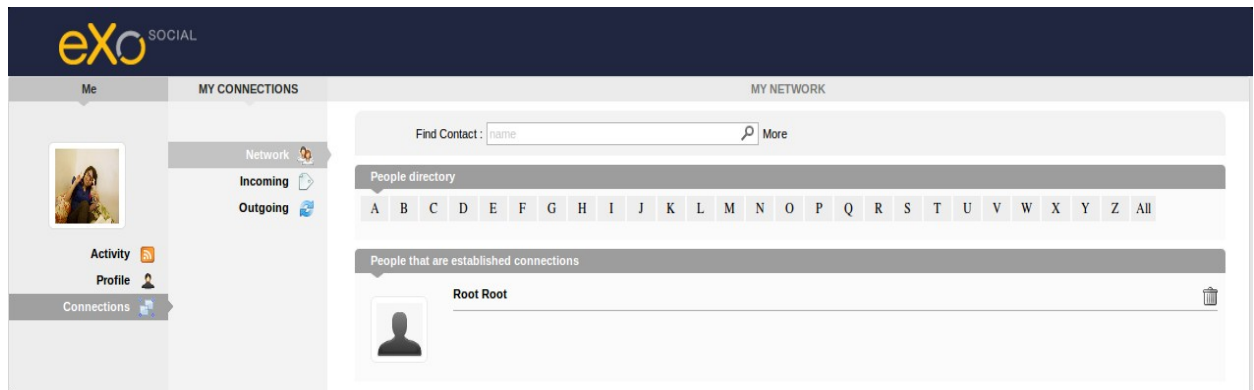
The icon  beside  is used to delete this experience.


- Input values for fields: **Organization**, **Position**, **Job Details**, **Skills Used**, **Start Date**, **End Date** and **Still in this position**.
- After updating information, click  to save all changes or  to close this form without saving any change.

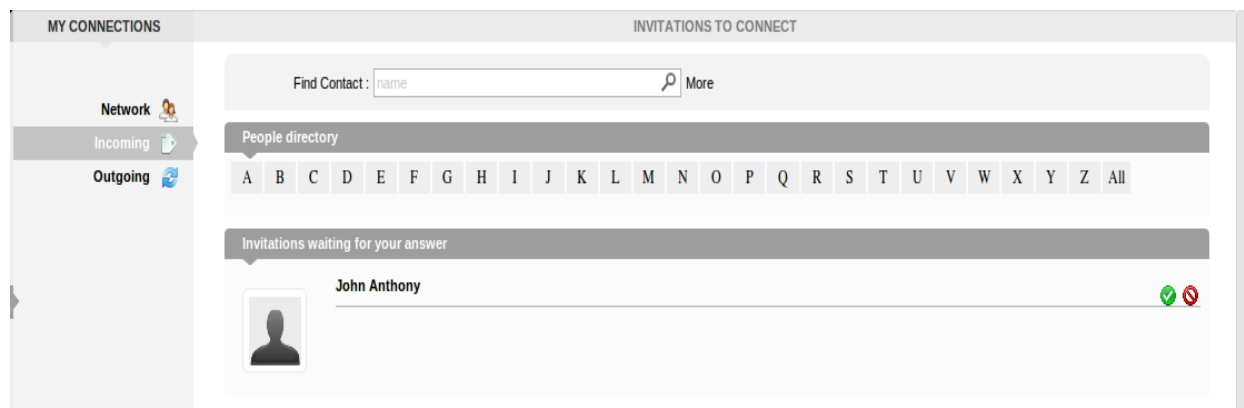
## 3.2 Connections



The **Connections** page lists all contacts who accepted as your contacts and who are waiting for your acceptance and contacts in request.


To enter **Connections**, hover your mouse over the display user name (for example, giang tran), and select **Profile | Connections** in the left pane; or hover your mouse over **People** on the Administration bar, and select **Connections**.

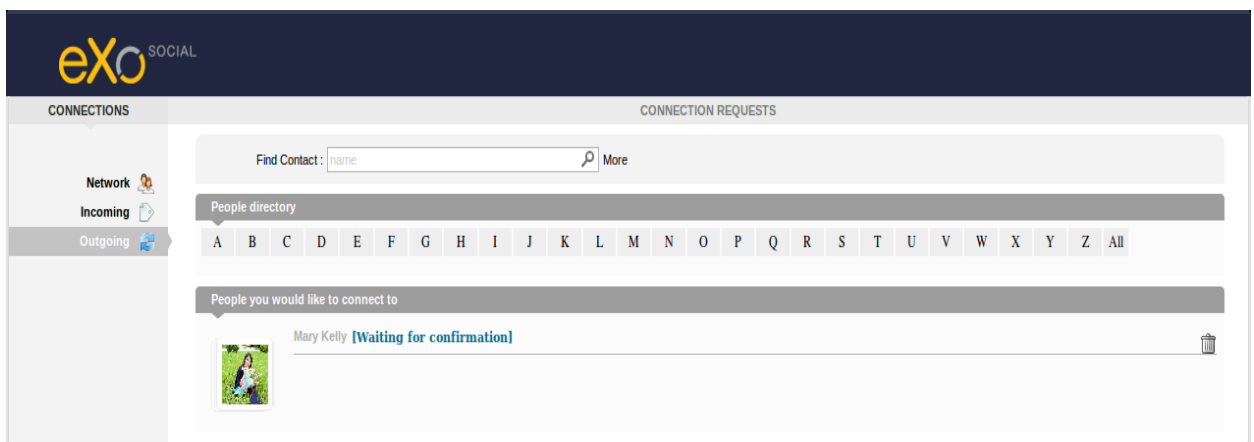


In the **Network** pane, you can delete users you don't want to be as your contact anymore clicking the icon  .



The **Incoming** pane lists contacts inviting you to become their contact. You can click  to accept being as his/ her contact or click  to refuse.

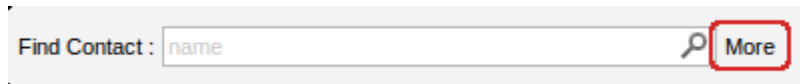
The **Outgoing** pane lists contacts you have sent requests for becoming your contacts. You also can click the corresponding icon  to remove your request.



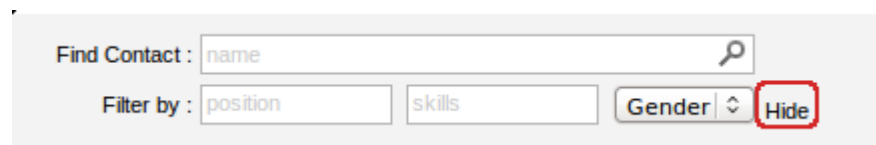
### 3.2.1 Search contacts

Click **People**, all contacts who use eXo Social are listed in the **People** page. The function is to search contacts conveniently as follows:


**Step 1:** Enter the contact name you want to search in the **Find contact** field:



- If you want to filter a contact with more information, click **More**. You can specify a contact filtering by position, skills and gender.
- If you don't want to filter contacts by above information, click **Hide**.



These results will be listed with all contacts whose names contain the same string as entered in the Search field.

**Step 2:** Click the glass icon  to find a contact. The results will be listed in the **People Found** pane:



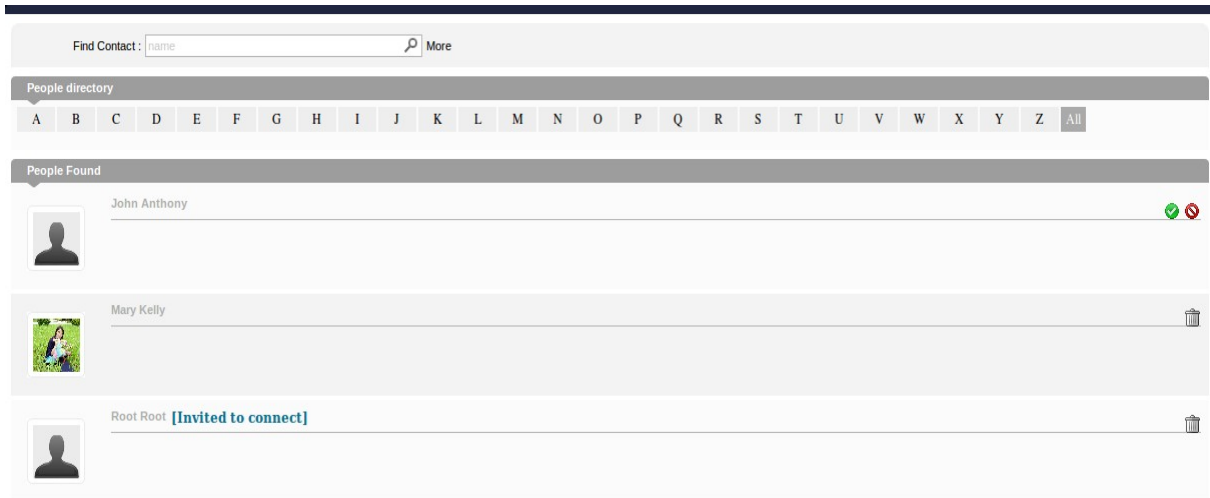
### 3.2.2 Send requests



You easily send a request by following these steps:

**Step 1:** Click the icon  which corresponds to your desired contact.

A text **[Invited to connect]** will be displayed next to the contact name, it means that your connection request has been pending until your contact confirms it.

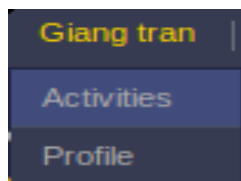
You can also click the icon  to remove your request to that contact.



If someone sends requests to you, in the **People Found** pane, you can click  to become their contact, or click  to refuse becoming their contact.

## 3.3 Activities

To enter **Activities**, hover your mouse over the User Profile icon on the administration bar and select **Activities**:

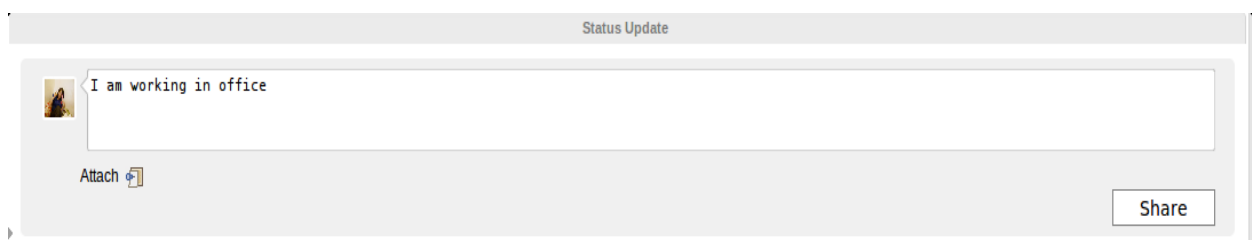


In the **Activities**, you can do the following actions:

### 3.3.1 Update status

To change your status, do as follows:

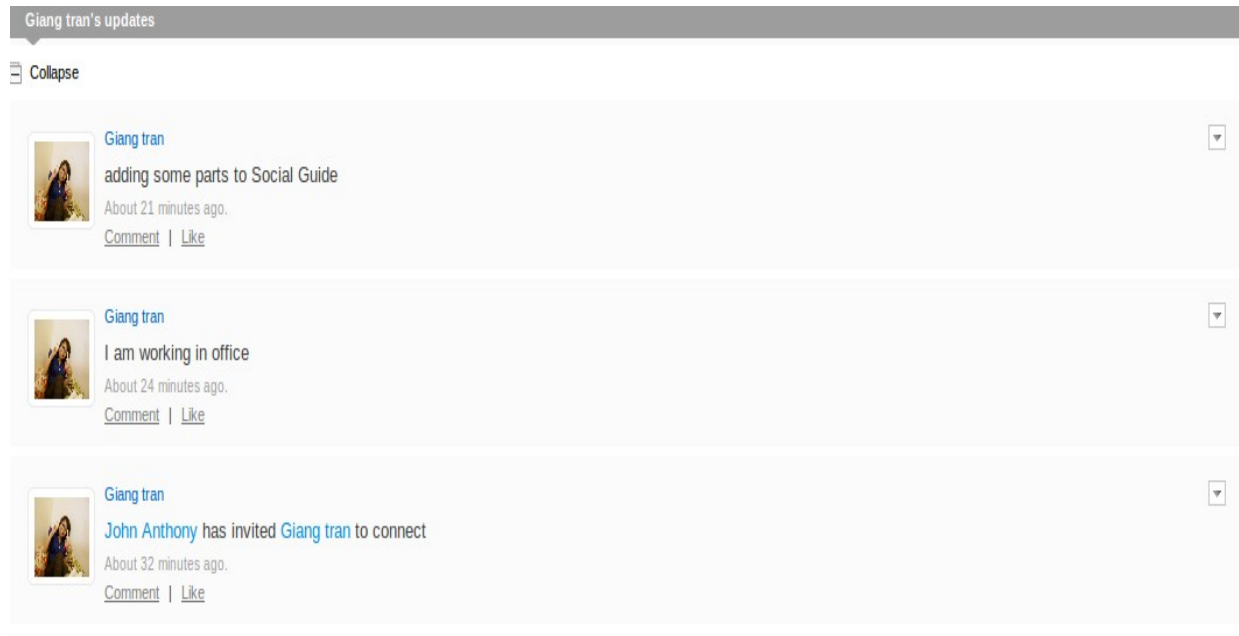
**Step 1:** Enter your current status in the **Status Update** form:





**Step 2:** Click **Share** to accept sharing your status.

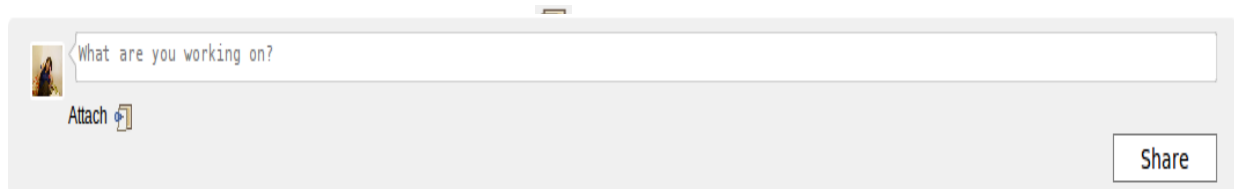
In the **Activity** space, you can see your own activities by clicking Expand icon. Your contacts' activity stream is displayed above.



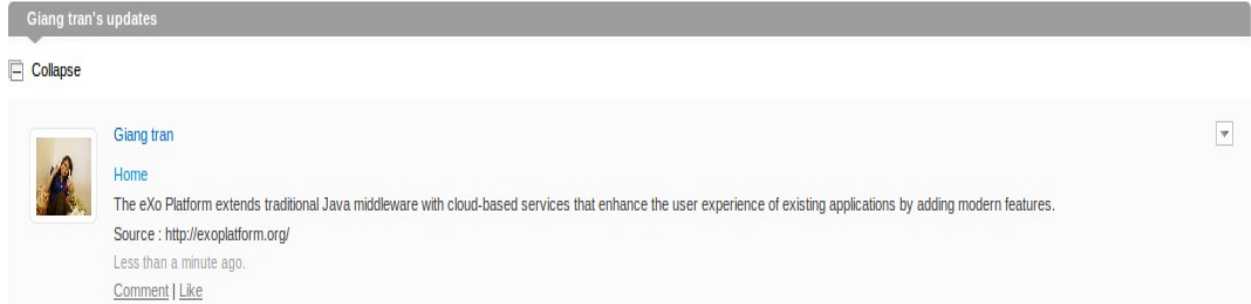
### 3.3.2 Share links

You can share your preferred links as follows:

**Step 1:** Click **Attach**.




**Step 2:** Enter the link into the **Attach** field and press **Attach**. If the link address is correct, it will be attached, then shown below the **Attach link** line with the link's overall introduction. Click **Share** if you want members to see it. The link will be displayed in your updates as below:



### 3.3.3 Delete activities

To delete an activity, do as follows:

**Step 1:** Choose one profile containing the activity you want to delete and hover your mouse over the icon  .

**Step 2:** Click **Delete**.

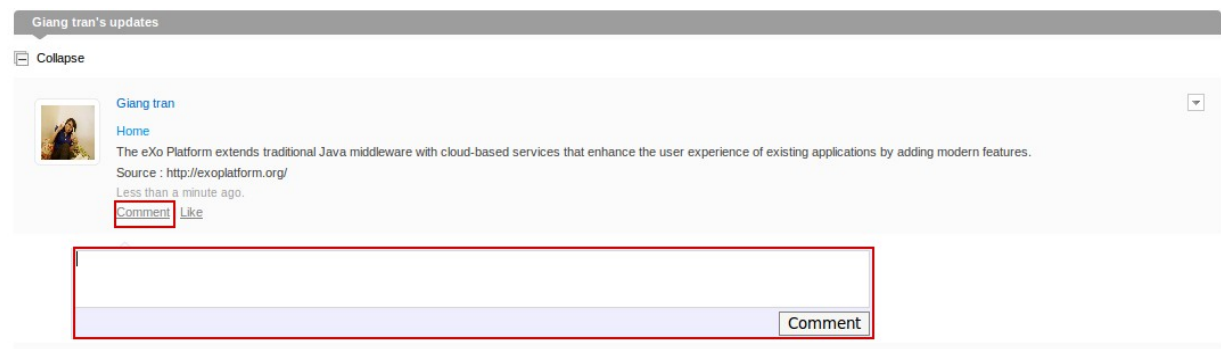


### 3.3.4 Comment on activities

To comment on activities, do as follows:

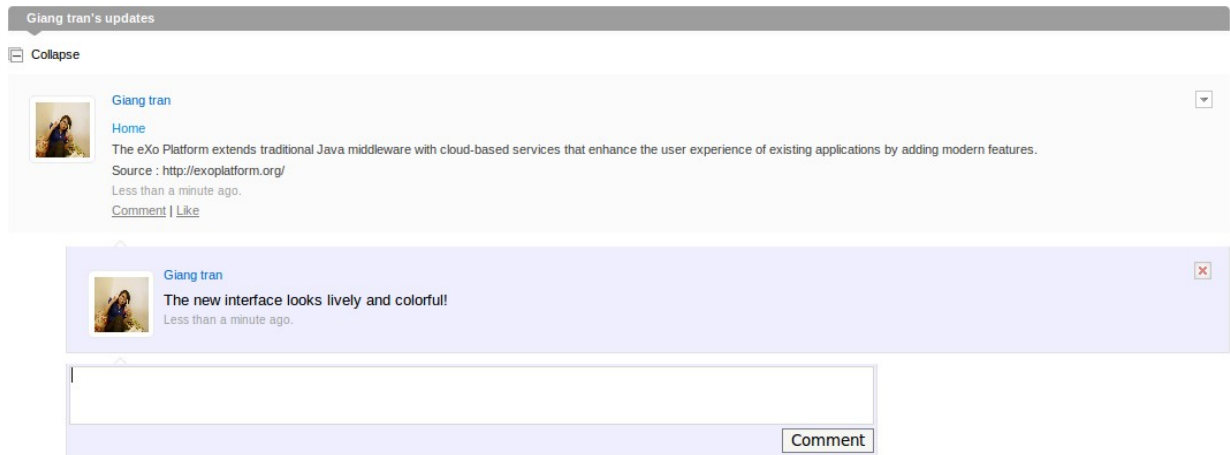
**Step 1:** Choose one profile containing the activity you want to comment.

**Step 2:** Click **Comment** in the bottom line of the profile. The **Comment** form will appear below.



**Step 3:** Enter your comment into the **Comment** form and press the **Comment** button.

Your comment will be displayed right below the profile and you can delete your comment by clicking X.



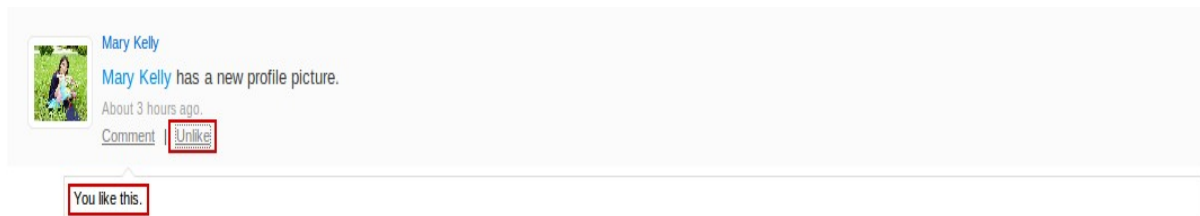
### 3.3.5 Like/Unlike activities

You can show your interest by choosing to like/unlike activities as follows:

**Step 1:** Choose the profile containing the activity you want to like/unlike.

**Step 2:** Click **Like** beside **Comment**.

After you choose Like, the text '**You like this**' will be displayed below and **Like** will be turned into **Unlike**.



You can select **Unlike** one activity in the same way as steps for **Like**.

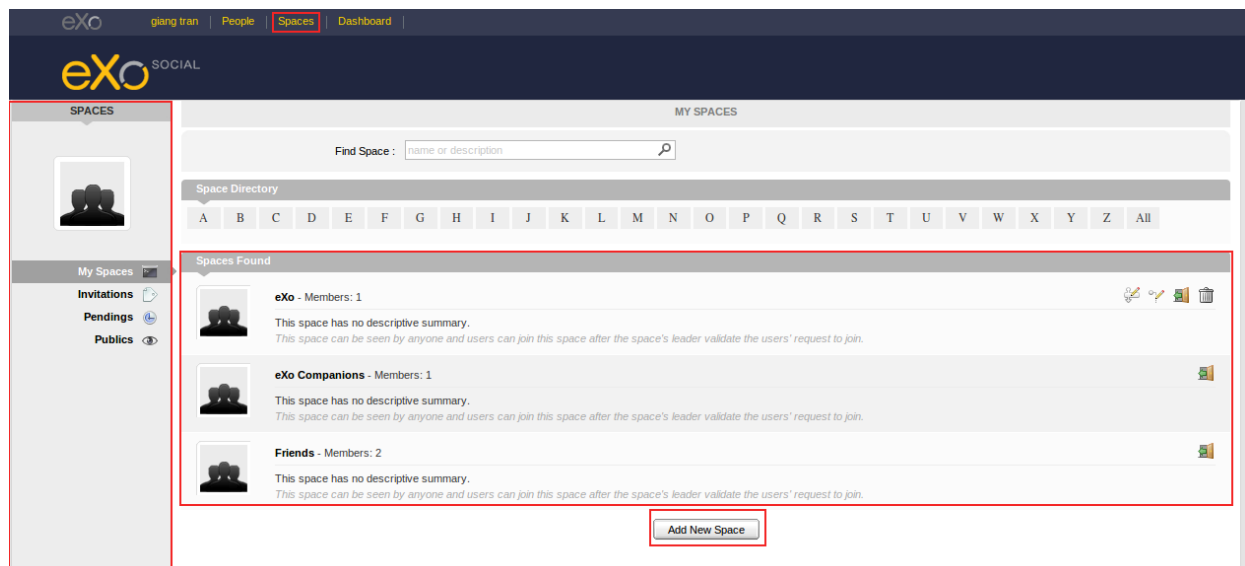
## 4 Space: Community Management



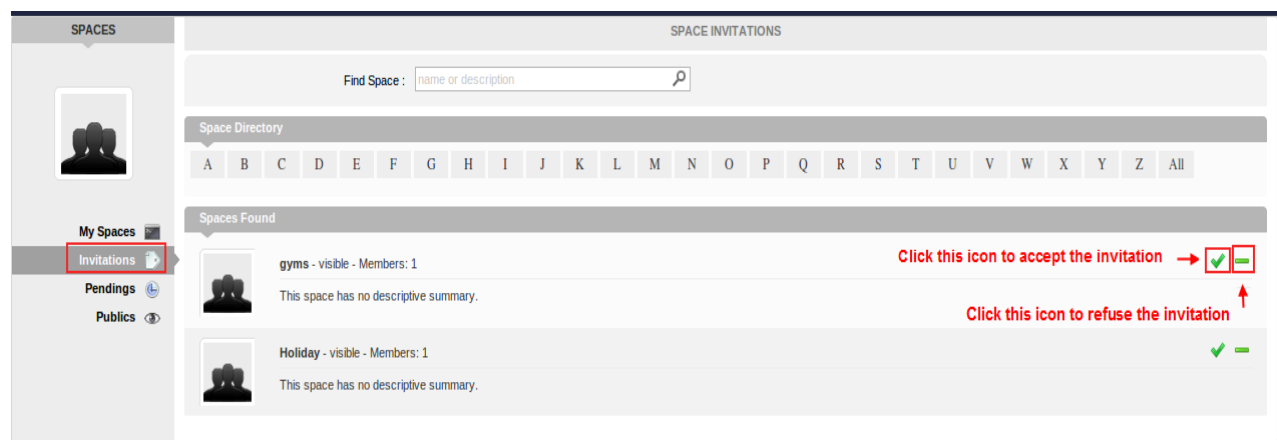
Before using the eXo Space, you should have basic knowledge about Gateln. Before reading further, you need to learn how to login and navigate in Gateln.

To enter a space, click **Spaces** on the administration bar. The Space navigation on the left pane includes:

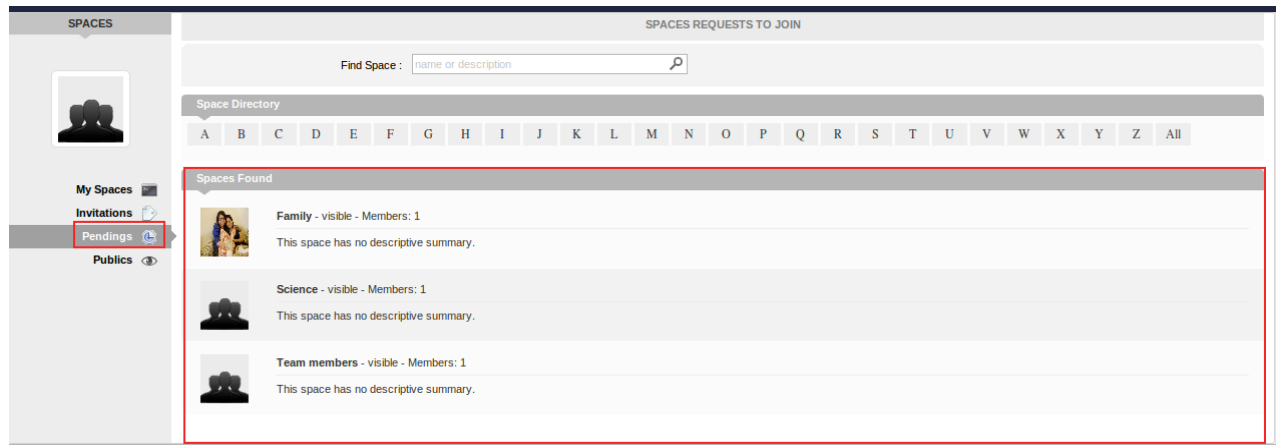
- **My Spaces:** to list spaces where you are member or manager.



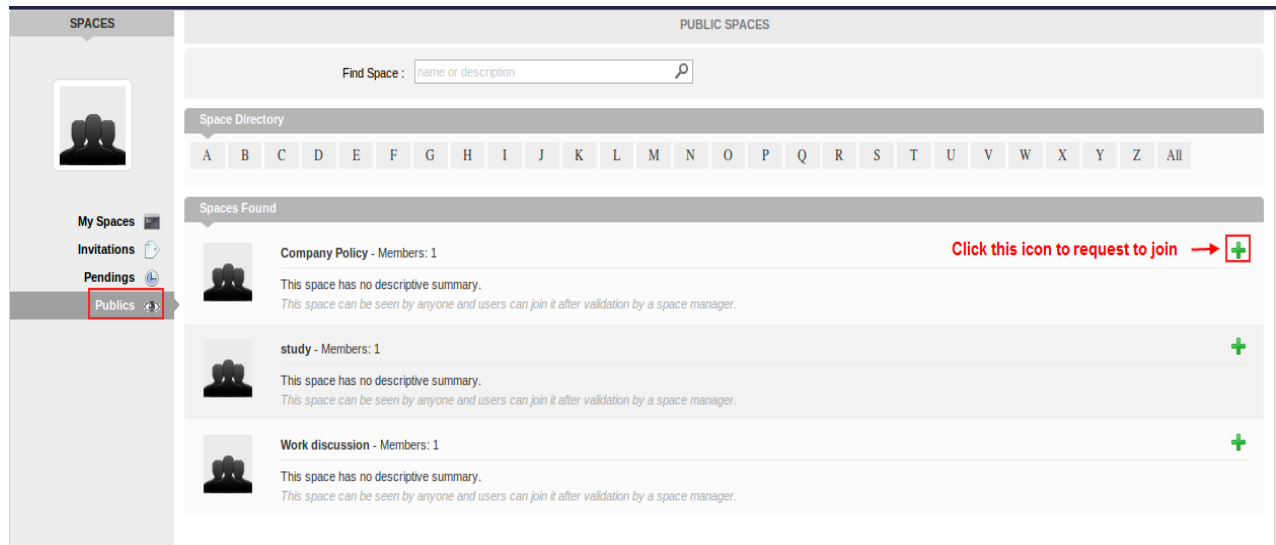
- **Invitations:** to list spaces where you are invited to become members by space managers.



- **Pendings:** to list spaces where you have requested for becoming members.



- **Publics:** to list all spaces which have been created with the **Visibility** value as **Visible**.



In the eXo Social, **root** is an administrator who has the highest permission and can see all spaces whether **root** is a member or not.

## 4.1 Create spaces

To create a space, do as follows:

**Step 1:** Click **Add New Space**. The **Add New Space** form will appear:

The screenshot shows a window titled "Add New Space" with a close button (X) in the top right corner. Inside the window, there are three tabs: "Settings" (selected), "Visibility", and "Bound to Group". The "Settings" tab contains the following fields:

- Name:** A text input field containing "eXo Companions". A red asterisk (\*) is to the right of the field.
- Priority:** A dropdown menu showing "Intermediate". Below it, a note says "(Space will be listed in the middle of the space list)".
- Description:** A text area containing "Site for sharing experiences, questions about jobs at eXo".

A "Create" button is located at the bottom center of the dialog.

#### Details:

The **Settings** tab includes:

|                    |                                                                                                                                                                                                             |
|--------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Name</b>        | Enter the space name which is required. Only alphabet, digit and space characters are allowed for this field.                                                                                               |
| <b>Priority</b>    | Choose the preference order for the space, including three levels: <b>High</b> , <b>Intermediate</b> , and <b>Low</b> . There will be a textual explanations corresponding to each selected priority value. |
| <b>Description</b> | Fill detailed information about the space. (For example, the space is used for which purposes.)                                                                                                             |



*When you input more than 2 spaces between words, these spaces will be converted to ONLY ONE space when being displayed. With space characters at the beginning and end of space names, these space characters will be omitted.*

The **Visibility** tab:

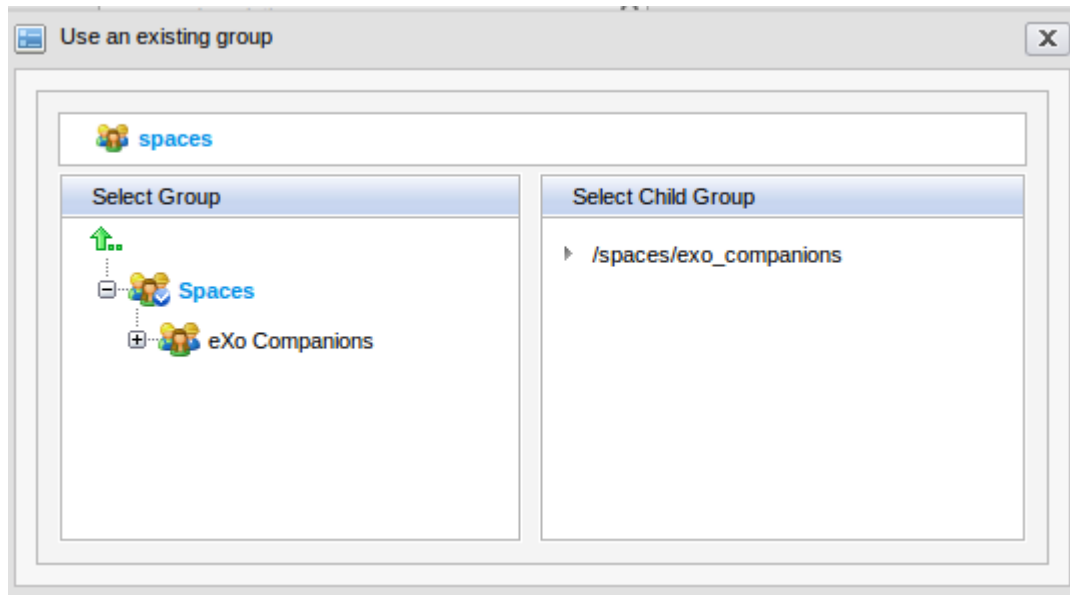
The screenshot shows a window titled 'Add New Space' with a close button (X) in the top right corner. Inside the window, there are three tabs: 'Settings', 'Visibility' (which is selected and highlighted with a blue border), and 'Bound to Group'. The 'Visibility' tab contains two sections of radio button options. The first section is labeled 'Visibility' and has two options: 'Visible' (selected with a black dot) and 'Hidden' (unselected). The second section is labeled 'Registration' and has three options: 'Open' (unselected), 'Validation' (selected with a black dot), and 'Close' (unselected). Below these options, there is a note in blue text: '(Space membership requires validation)'. At the bottom center of the dialog box is a 'Create' button.

**Visibility** By default, the **Visibility** value is set to be **Visible** that means this space is listed in the public spaces directory. If **Hidden** is selected, this space is not listed in the public spaces directory.

**Registration** By default, the **Registration** value is set to be **Validation**. If **Open** is checked, users who have sent requests will automatically become the space's members without any validation; or if the **Validation** is selected, users will become the space's members only after being accepted by this space's manager; or if **Close** is checked, users cannot send their requests for becoming members, except that they receive one invitation from the space manager.

The **Bound to Group** tab: enables users to bind a space ONLY to groups where they are already 'manager'. If one user is the group's manager, the group will be displayed in the group list for choice. When one space is created by **Bound to Group**, the group's members will be invited to become members of that space.

Select the **Use an existing group** checkbox if you want members of the selected existing group to become this space's members. The **Use an existing group** will appear:



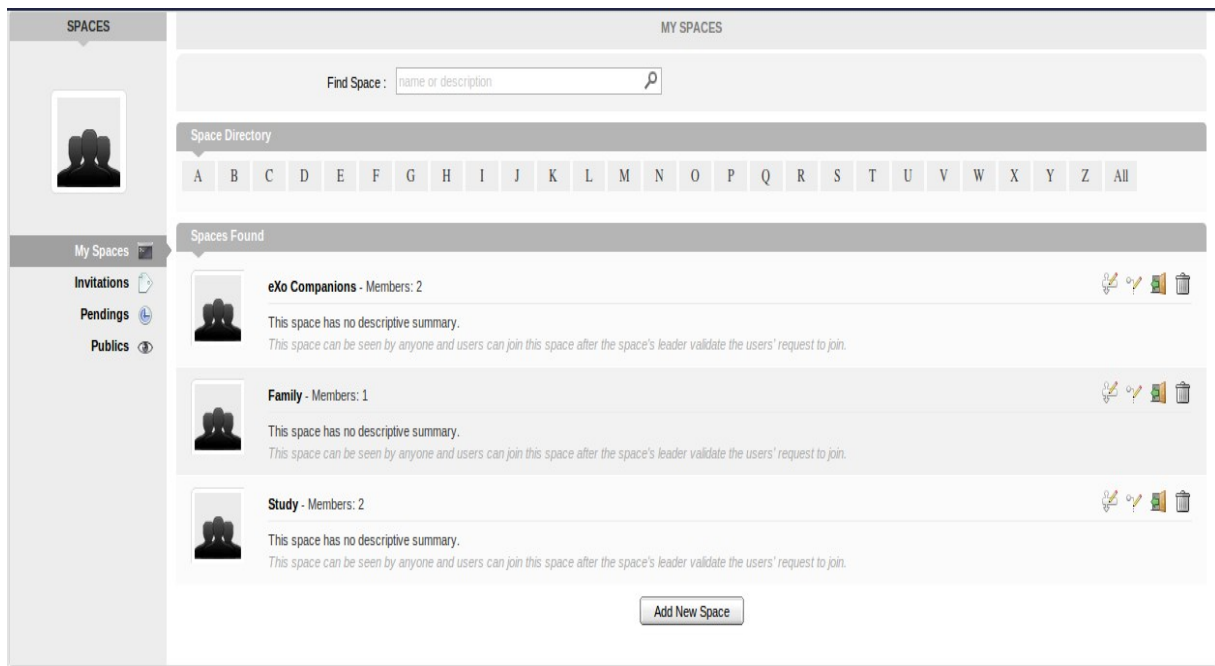
After an existing group has been selected, all users in that group will be the space members with the manager role by default.

**Step 2:** Enter values for fields in the **Add new space** form.

**Step 3:** Click **Create** to complete creating a new space.


You will see your new space in the list. Click its name and start exploring it.



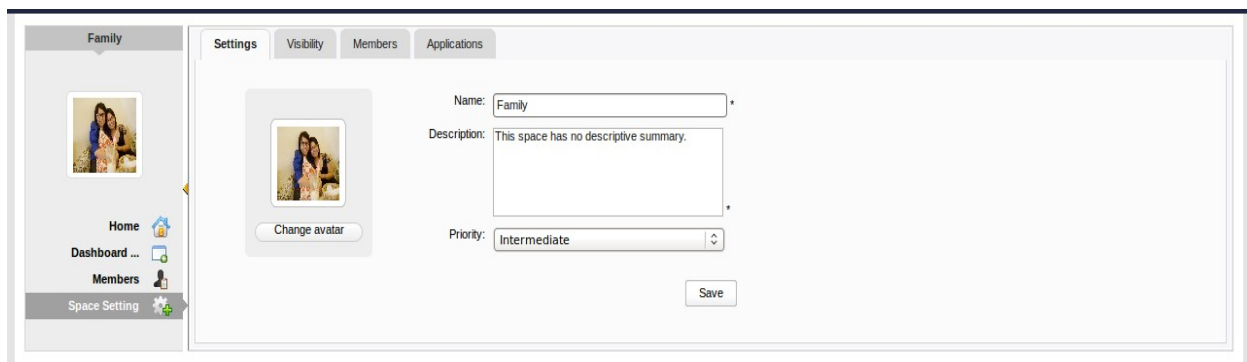


## 4.2 Edit space settings

This function allows you to change setting information of a space, manage members and applications if you are the space's creator or have a manager right on it. Follow these steps:

**Step 1:** Click the icon  that corresponds to the space which you have the edit right.

**Step 2:** In the **Settings** tab, change information related to the space:



### 3.1.1. Change space's information

This function allows you to edit basic information about a space.

**Step 1:** Change information that you want to edit.

**Details:**

|                    |                                                                             |
|--------------------|-----------------------------------------------------------------------------|
| <b>Name</b>        | The current name of space which is required, so you can not leave it blank. |
| <b>Description</b> | The brief description about the space.                                      |
| <b>Priority</b>    | The priority affects the space order in the space list.                     |

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

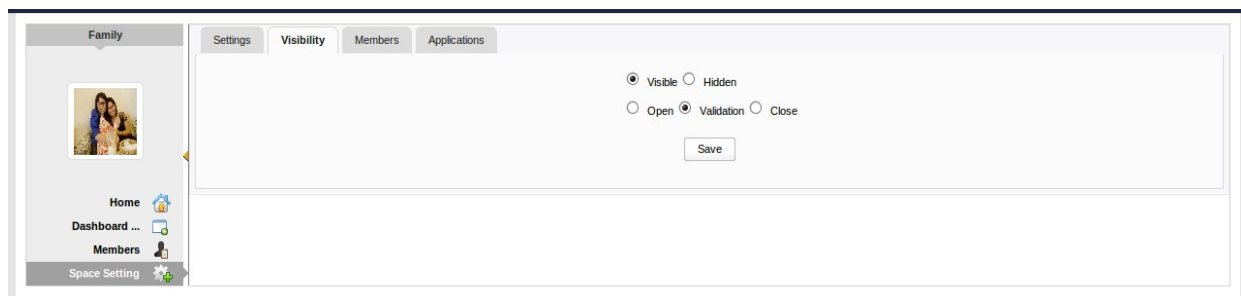
### 4.2.1 Change space avatar

To change avatar, refer to the section 3.1.1.

### 4.2.2 Manage visibility

**Step 1:** Click the edit icon that corresponds to the space which you have the edit right.

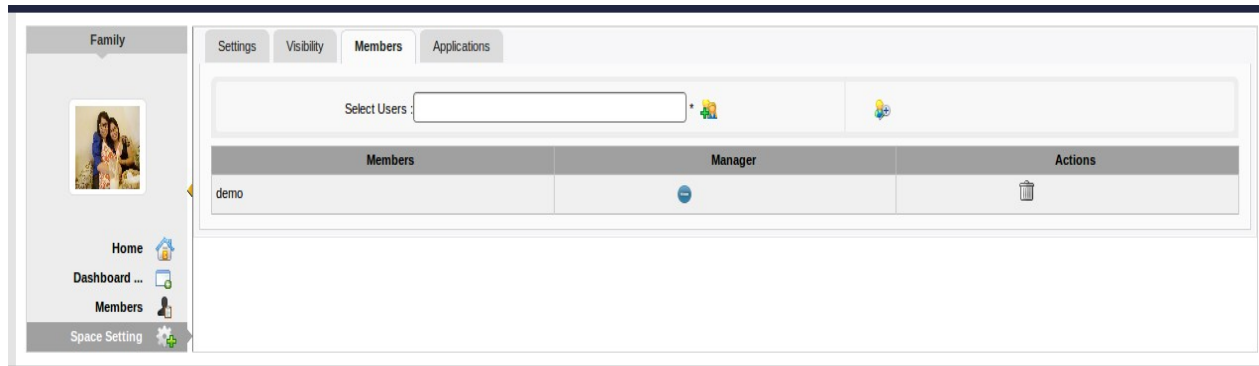
**Step 2:** Select the **Visibility** tab:



**Step 3:** Change the **Visibility** and **Registration** modes to your needs. By default, **Visibility** is **Visible** and **Registration** is **Validation**.

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

## 4.2.3 Manage members



Click the **Members** tab to open the edit member interface:

In this tab, you can take the following actions:

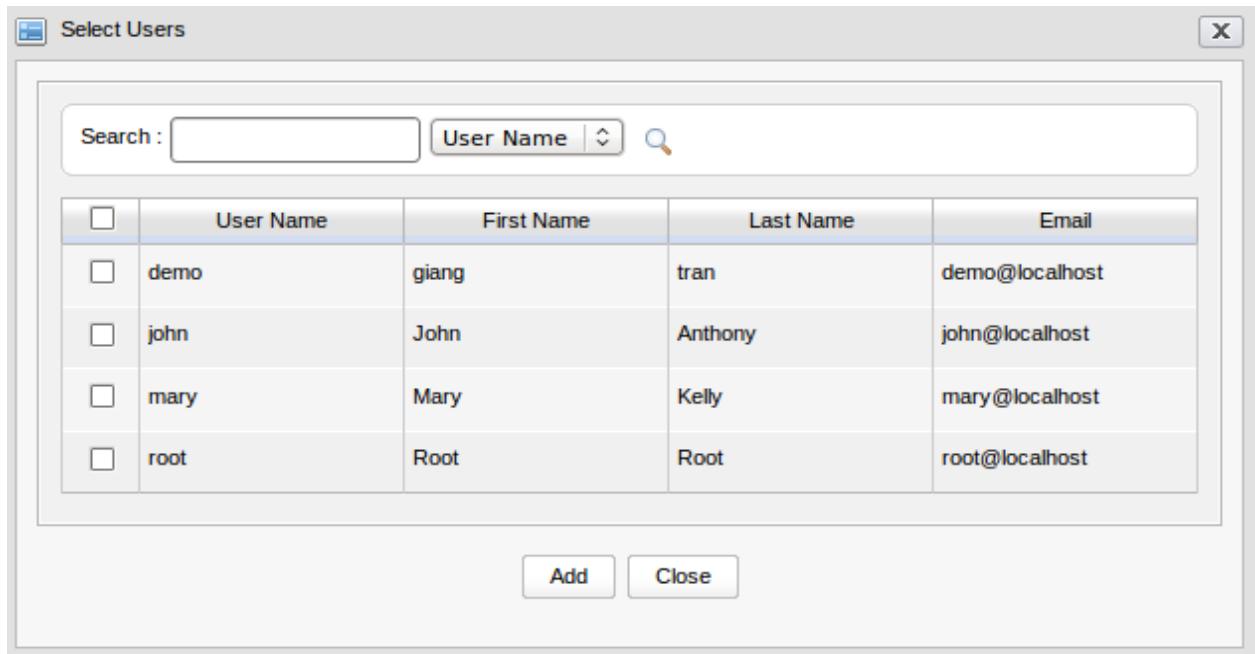
- Invite new members to join this space.
- Promote a user to manager.
- Remove users.

### 4.2.3.1 Invite new members

If you know the username of a person, you can easily invite him/her to your space by following these steps:

**Step 1:** Simply enter his/her user name in the text box and click the icon . If you have multiple people to invite, you can enter multiple user names separated by a comma.

**Step 2:** If you don't know the user name of a person who you want to invite, you can click the icon to open the **Select Users** form:

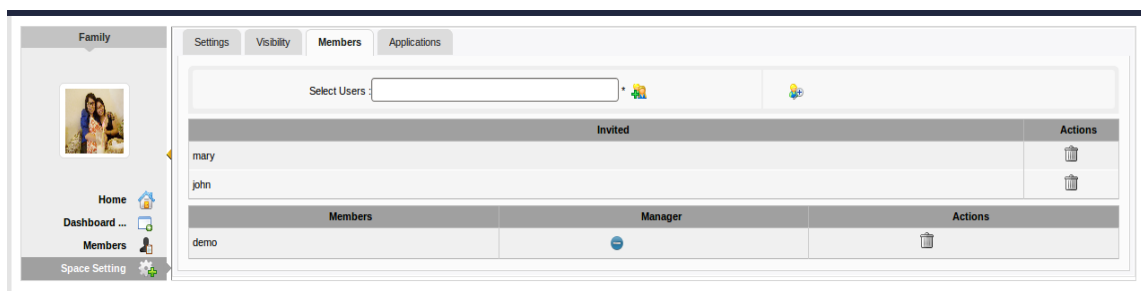


**Step 3:** Search among members of a portal as follows:

- Enter a search term in the **Search** box.
- Then, select a criterion you want to find by in the combo box next to this **Search** box.
- Click the search icon to perform searching.

The results will be listed in the table under. When you have found people you want to invite, select them by checking the corresponding check boxes and click the **Add** button.

Then, click the icon  to accept the invitee. After inviting, you will see the invited user list.




In the invited users' space, he/she will see those spaces in the **Invited** part.

Please note that Root who has the highest right will automatically become the member of spaces whenever invited.

### 4.2.3.2 Revoke invitations

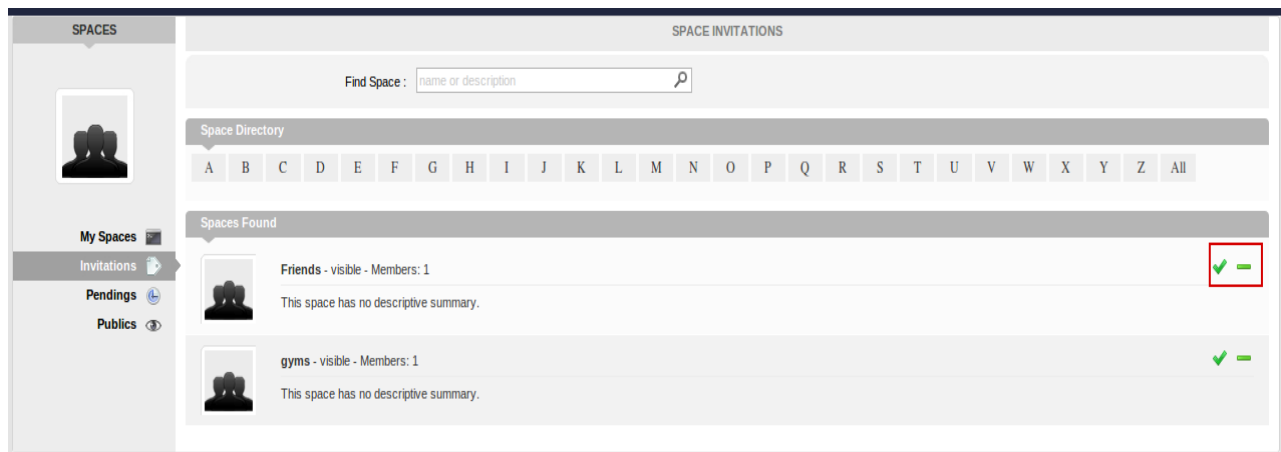
If invitations aren't accepted by the invited users yet, you can revoke the invitations by yourself.

To revoke the invitation of the invited user, just click  that corresponds to that user. That user will be removed from the **Invited** list column.

### 4.2.3.3 Accept & Deny invitations

This function allows you to accept an invitation that you received from others.

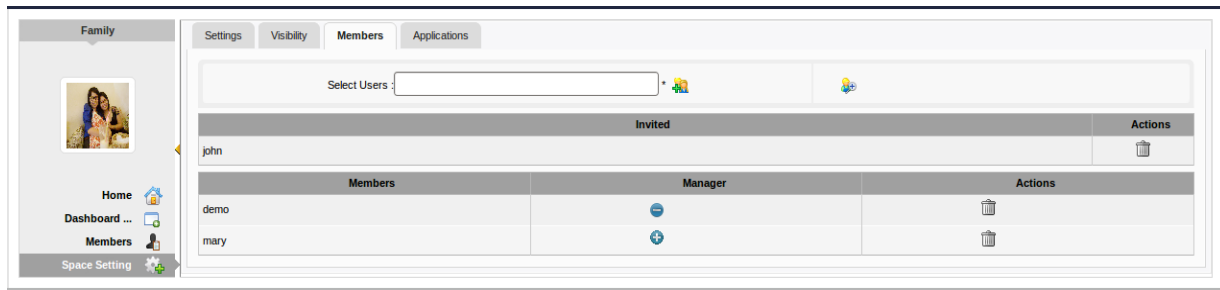
Spaces which are being waited for acceptance will be listed in the **Invitations** space of the invited users:





If you want to accept the invitation, click  corresponding to the space you want to accept.

If you don't want to accept the invitation, click  corresponding to the space you donot want to accept.


#### 4.2.3.4 Promote a member to manager or vice-versa



Just click  corresponding to the member name in the **Manager** column. The user will be automatically promoted as a manager in the current space.

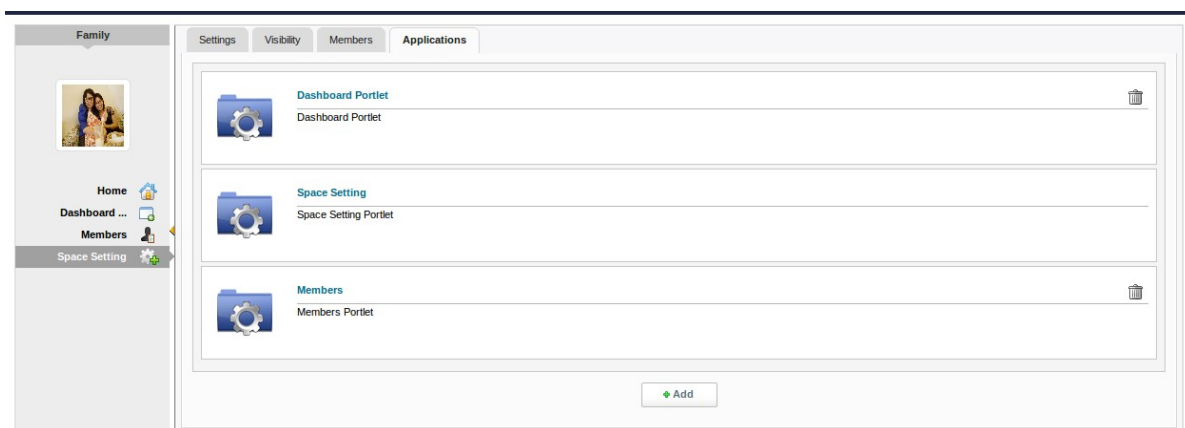
To remove the manager status, just click . Be careful not to remove the rights for yourself, or you will not be able to edit settings anymore, except that you are an administrator.

#### 4.2.3.5 Remove members

Simply click  corresponding to the member you want to remove.

### 4.2.4 Manage space applications

**Step 1:** Click the **Applications** tab to open the application list:

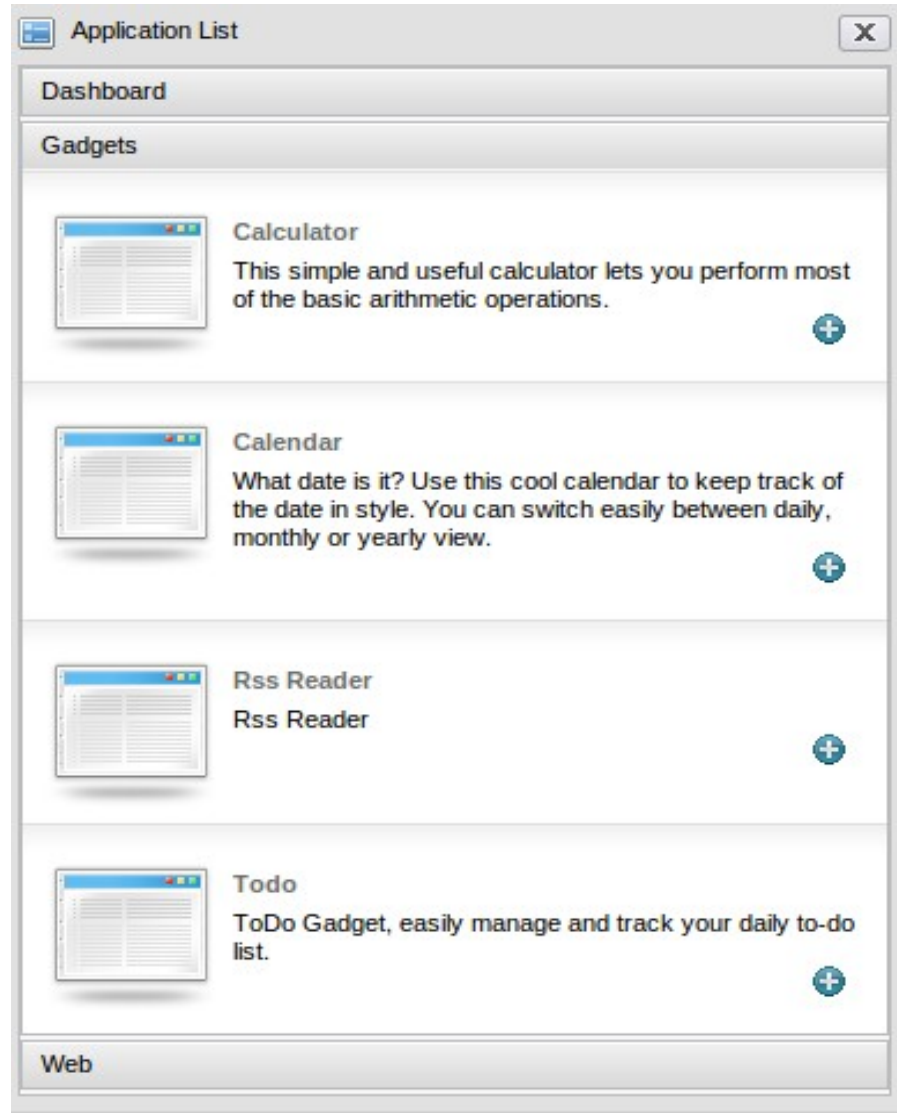



To remove an application, just click the icon  next to the application name.

To add an application,

You can add a new application to your application list of the current space. Do as follows:

**Step 2:** Click **Add** to open the available applications list:




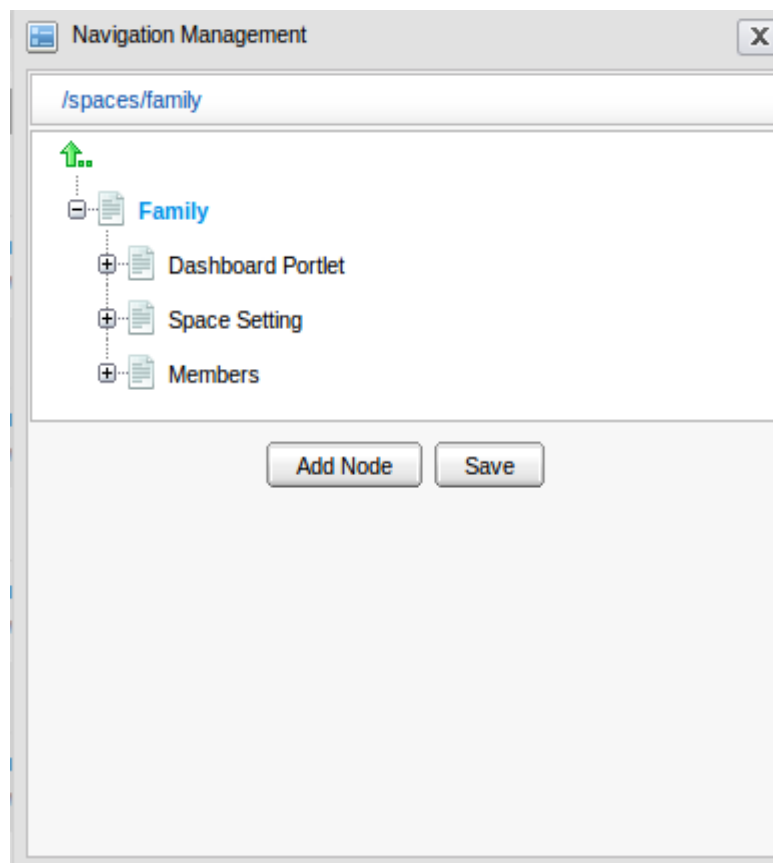
**Step 3:** Select the application you want to install by clicking the icon  which corresponds to that application.

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

## 4.3 Edit space's navigation

Users can easily edit a space's navigation by following these steps:

**Step 1:** Click  which corresponds to the space you have the edit right. The **Navigation Management** will appear:



Users can take the following actions: (refer to GateIn guide for more details):


- Right-click the node name (space name) to add a new node, edit a node, edit a node's page, copy a node, clone a node, etc.
- Click **Add Node**.

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

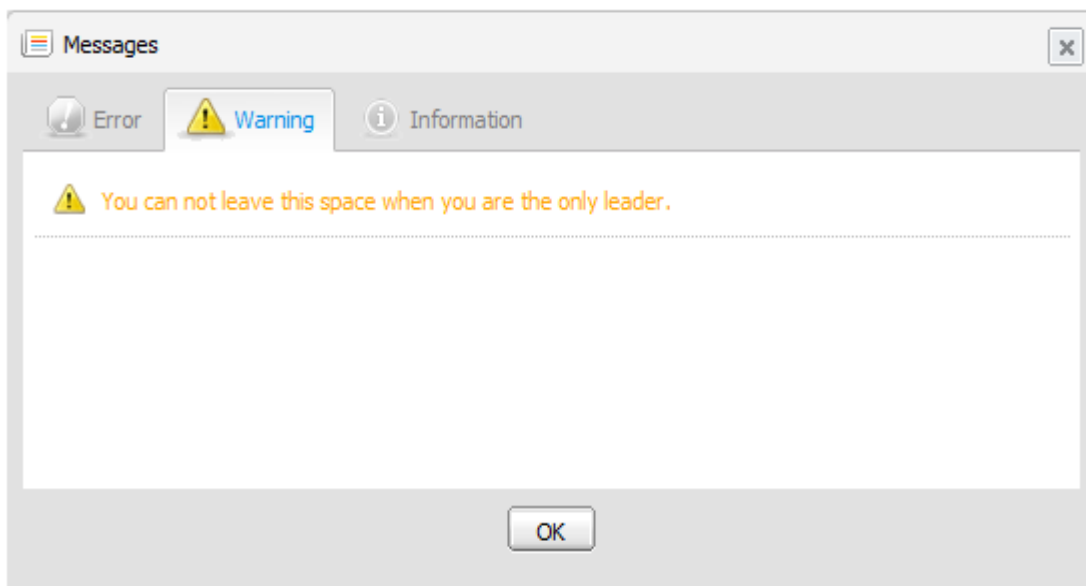



## 4.4 Leave spaces

This function allows users to quickly leave the space that users donot want to stay anymore or to be the space's member.

**Step 1:** Click  that corresponds to the space to leave that space.

If a user is only the leader of that space, the message which informs that you cannot leave a space will appear:




However, when you are members invited by the leader, you can leave the space by clicking  corresponding to the space.



After you can leave one space, the space will not exist in **My Spaces** other than in **Publics** in the left pane.

## 4.5 Delete spaces

Only the space manager can delete their spaces by clicking  that corresponds to the desired space to delete all information and navigations related to that space.

## 5 Conclusion

The user guide has provided a thorough explanation of basic terms and features within eXo Social. Now, you have known how to use **People, Activities and Spaces** easily and effectively. To learn more and contribute to the open source development, please see the followings.

- [Learn more about eXo Platform 3.0](#)
- [Video demos, tutorial and more in the eXo Resource Center](#)
- [Access another eXo documents in the eXo Wiki](#)