



eXo Social User Guide

Version 1.1

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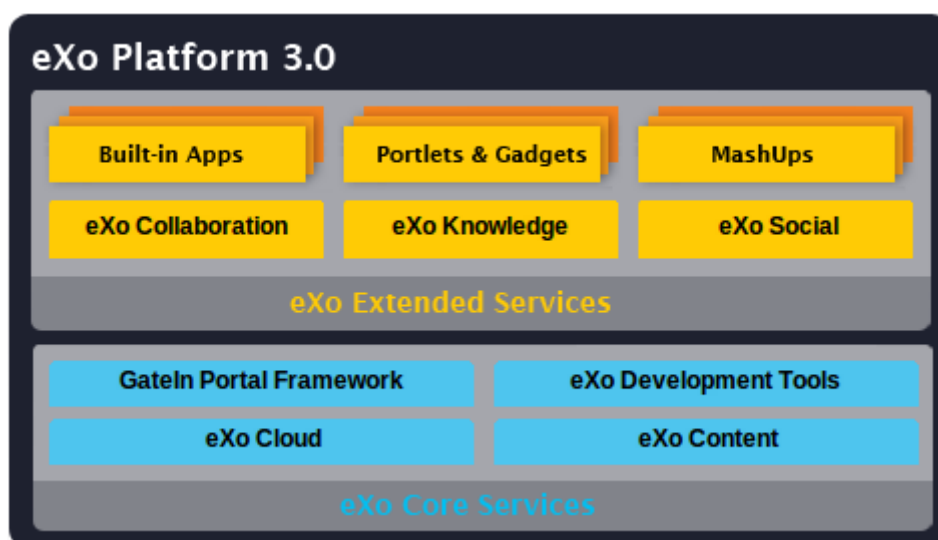
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1 Preface

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.



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, such as Facebook and LinkedIn, 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.
- **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 eXo Social User Guide is written as a handbook, aiming at instructing step-by-step on how to use this application quickly and efficiently.

The guide has been arranged into the following information:

- Preface: Overview, why uses eXo Social, information, and references.
- Glossary: Basic terms used in eXo Social.
- People: Enterprise Social Networking: How to work with People application, including updating profile, managing connections, and managing activities.
- Space: Community Management: How to work with Space, including creating, editing, leaving and deleting spaces.

The guide is aimed at everyone interested in learning and using the eXo Social application, especially for those who apply eXo Social with **People** and **Spaces** applications into their 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 is a network of people who have some common things and want to share their works, interests via connections. The **Social network** combines multiple applications to create an easy connectivity among users. eXo Social aims at 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 connections can be managed and customized easily.

2.3 Profile

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

2.4 Connections

Connections will display information about relations 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, or denied by receivers and sending requests also can be canceled 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 where you can manage users and communities more conveniently. It enables you to regroup people by various interests or projects and to leverage any existing application, such as portlets or gadgets.

2.8 Space manager

Space manager is a user with special rights within a space. He can manage the list of members, configuration and install applications. When the 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 in the public spaces list.
- **Hidden:** The space is not visible in the public spaces list.

2.10 Different registrations for a group available

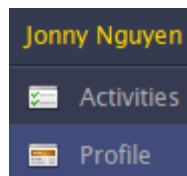
- **Open:** The user can join a space without any validation.
- **Validation:** The user's membership must be validated by a space manager.
- **Close:** The user cannot request for joining, but only the space manager can invite him.

3 People: Enterprise Social Networking

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 username (for example, Jonny Nguyen) on the administration bar and select **Profile**.



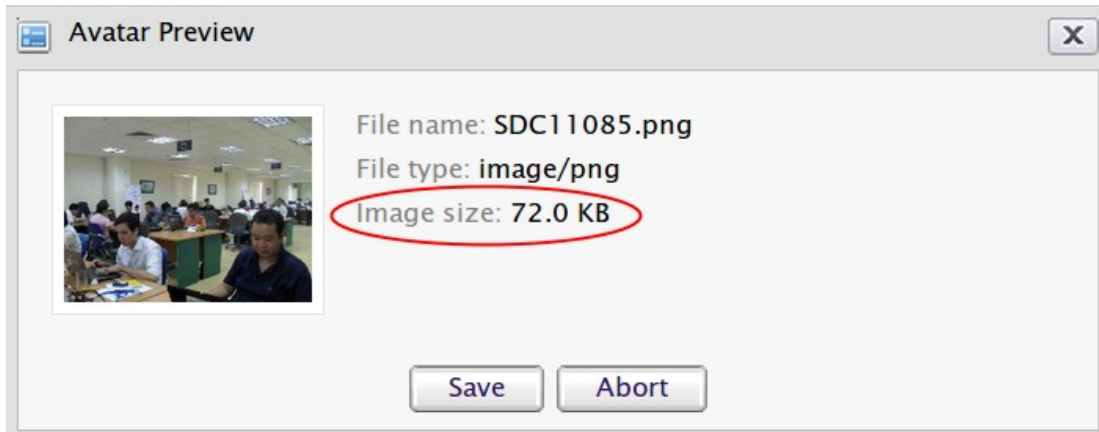
Or, click **Activities** and select **Profile** in the left pane.

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

The screenshot displays the eXo Social user interface. On the left, a sidebar under the 'Me' tab contains links for 'Activity', 'Profile' (highlighted with a red box), and 'Connections'. The main area shows the 'Public Profile' of 'Jonny Nguyen', who is a 'Tester' (with an 'Edit' link). Below the name is a placeholder for an avatar, with a 'Change avatar' button (highlighted with a red box) and a right arrow. The profile is divided into sections: 'Basic Information' (User name: john, First name: Jonny, Last name: Nguyen, Email: john@localhost), 'Contact' (Gender: male, Phone: Work: (84)43567876, Home: (84)43897122, Instant Messaging: Gtalk: jonny_nguyen, Skype: jonny, Urls: http://blogger.com), and 'Experiences' (Current: Tester at eXo Sea, December 1 2009 Until now, Be responsible for testing and assuring quality of software of Company. IT, Java, Testing Method).

3.1.1 Change avatar

1. Click **Change Avatar** to open the **Avatar Upload** form.
2. Select and upload one photo which must be less than **TWO** MBs as your avatar.
3. Click **Confirm** to open the **Avatar Preview** form with some related information, such as file name, file type and image size. The avatar will be automatically resized to a suitable scale.



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

3.1.2 Change current position

1. Click **Edit** on the top of the **Public Profile** pane.

Jonny Nguyen
Tester [\(Edit\)](#)

The form to update the current information will appear:

Jonny Nguyen
 * [\[Close\]](#) [\[Save\]](#)

2. Enter your new position in the textbox and click **Save**. Your current position will be immediately updated.


3.1.3 Change basic information

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



A dialog box titled "Basic Information" with a close button (X) in the top right corner. It contains four input fields: "User name" with the value "john", "First name" with "Jonny", "Last name" with "Nguyen", and "Email" with "john@localhost". Each field has a small asterisk (*) to its right.

2. Change information related to your account, including **Username**, **First name**, **Last name** and **Email**.

3. Click  to accept all changes. There will be a message which informs the successful update. Click **OK** to accept.

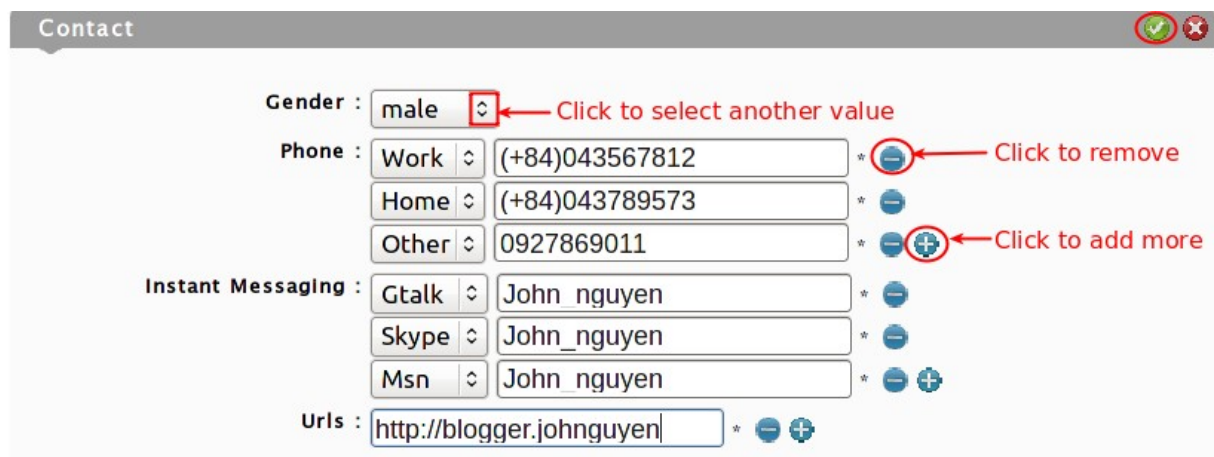


You can also change your basic information by clicking your name directly on the administration bar. For more details, see [GateIn User Guide](#).

3.1.4 Change contact information



1. Click  that corresponds to the **Contact** pane.

2. Enter your information in fields, including **Gender**, **Phone**, **Instant Messaging**, and **Urls**.



A dialog box titled "Contact" with a close button (X) in the top right corner. It contains several fields and controls:

- Gender**: A dropdown menu showing "male". A red box highlights the dropdown arrow, with a red arrow pointing to it and the text "Click to select another value".
- Phone**: Three rows, each with a dropdown menu (Work, Home, Other) and a text input field. The first row has the value "(+84)043567812". The second row has the value "(+84)043789573". The third row has the value "0927869011". Each row has a small asterisk (*) to its right. A red circle highlights the minus button (-) next to the first row, with a red arrow pointing to it and the text "Click to remove". A red circle highlights the plus button (+) next to the third row, with a red arrow pointing to it and the text "Click to add more".
- Instant Messaging**: Three rows, each with a dropdown menu (Gtalk, Skype, Msn) and a text input field. The first row has the value "John_nguyen". The second row has the value "John_nguyen". The third row has the value "John_nguyen". Each row has a small asterisk (*) to its right. A red circle highlights the plus button (+) next to the third row.
- Urls**: A text input field with the value "http://blogger.johnguyen". It has a small asterisk (*) to its right. A red circle highlights the plus button (+) next to the field.

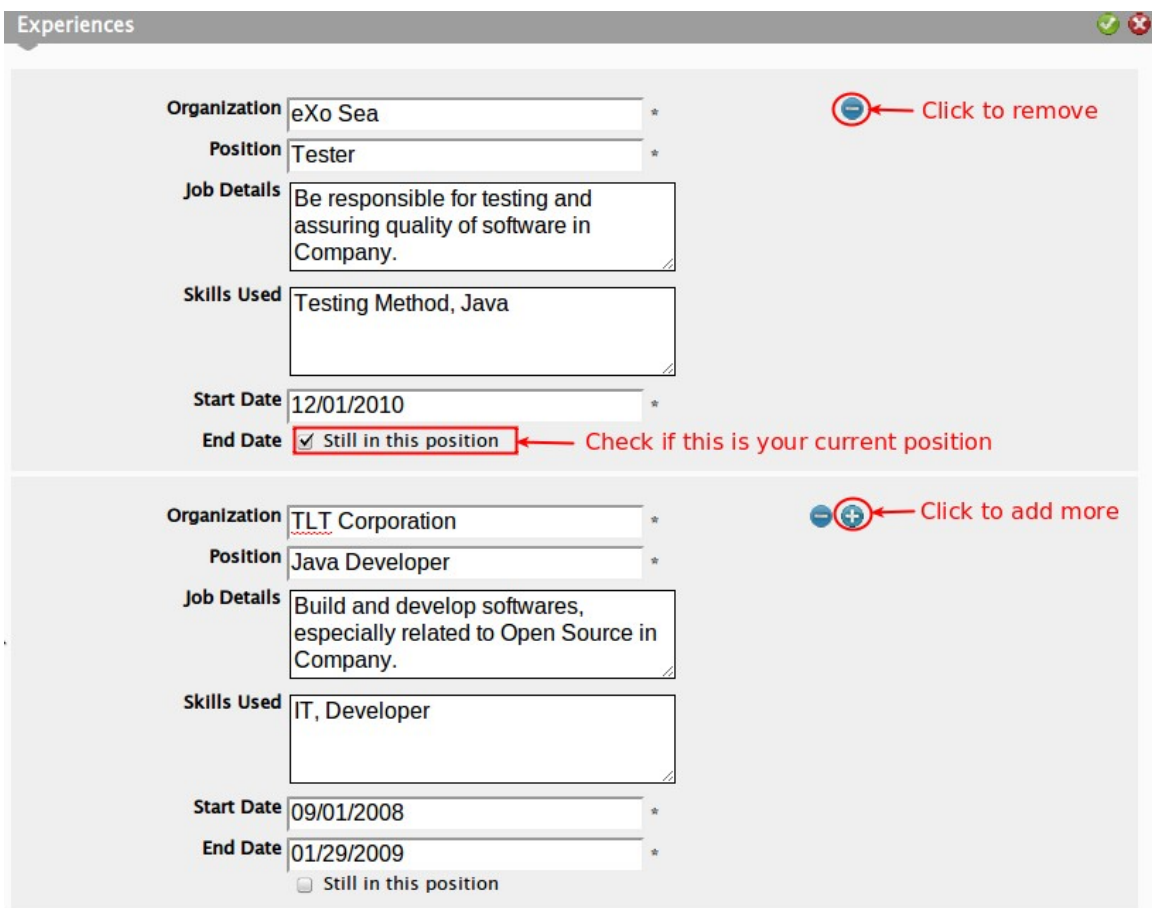
3. Click  corresponding to each field you want to add more or  to remove your entered information.

4. Click  to save all changes.

3.1.5 Change experiences

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

2. Enter your experiences into fields.



The screenshot shows the 'Experiences' edit form with two entries. The first entry is for 'eXo Sea' as a 'Tester' starting on 12/01/2010. The 'End Date' is set to 'Still in this position' (checked). The second entry is for 'TLT Corporation' as a 'Java Developer' starting on 09/01/2008 and ending on 01/29/2009. The 'Still in this position' checkbox is unchecked. Red annotations highlight the minus icon for removal and the plus icon for adding more.

Organization	Position	Job Details	Skills Used	Start Date	End Date	Still in this position
eXo Sea	Tester	Be responsible for testing and assuring quality of software in Company.	Testing Method, Java	12/01/2010	<input checked="" type="checkbox"/> Still in this position	<input checked="" type="checkbox"/>
TLT Corporation	Java Developer	Build and develop softwares, especially related to Open Source in Company.	IT, Developer	09/01/2008	01/29/2009	<input type="checkbox"/> Still in this position

3. Click  to save all changes.

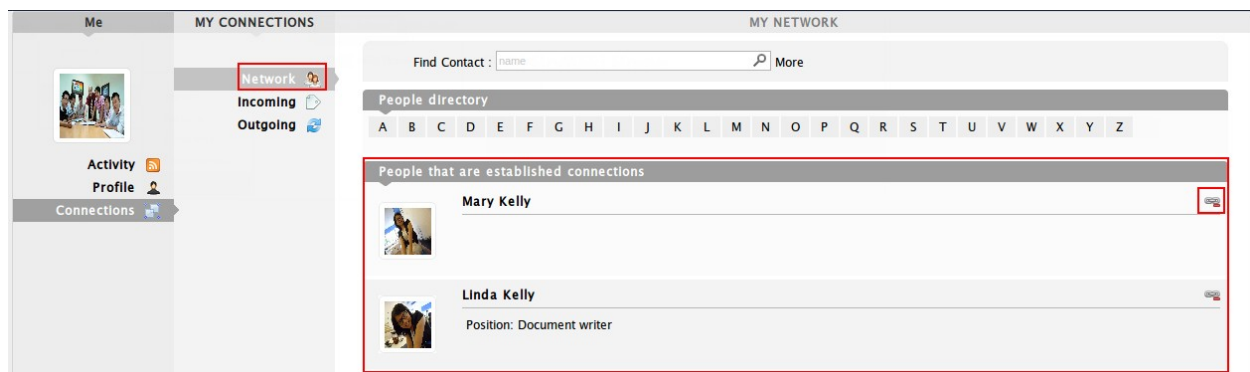


Information entered in the **Position** field is only used for providing more details, not for searching. Meanwhile, information entered in the **Skills Used** field will be retrieved when you do the **Search** function.

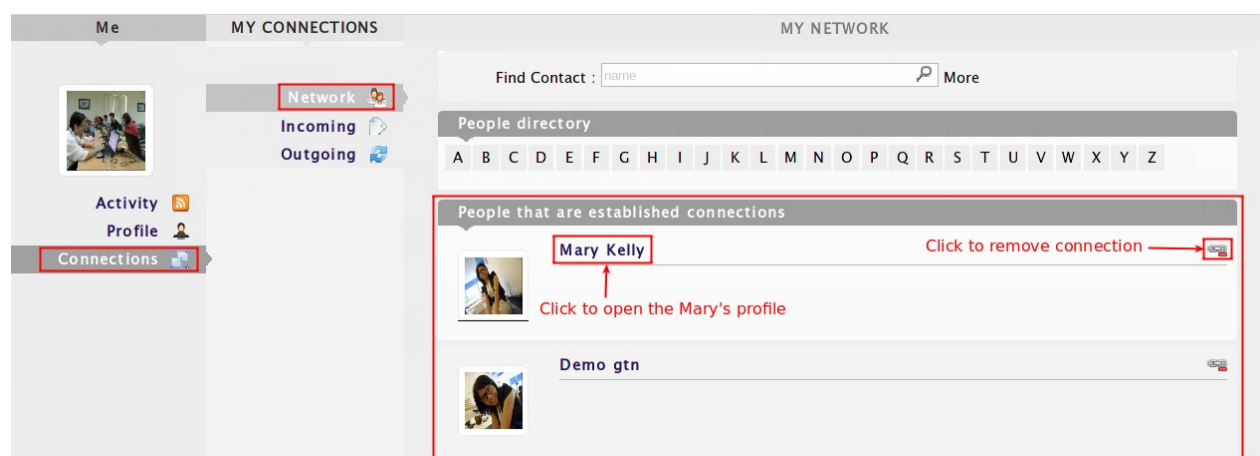
3.2 Manage Connections


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 username (for example, Jonny Nguyen) on the toolbar, then click **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 remove connections with the users you do not want to be as your contacts anymore via one of two following ways:

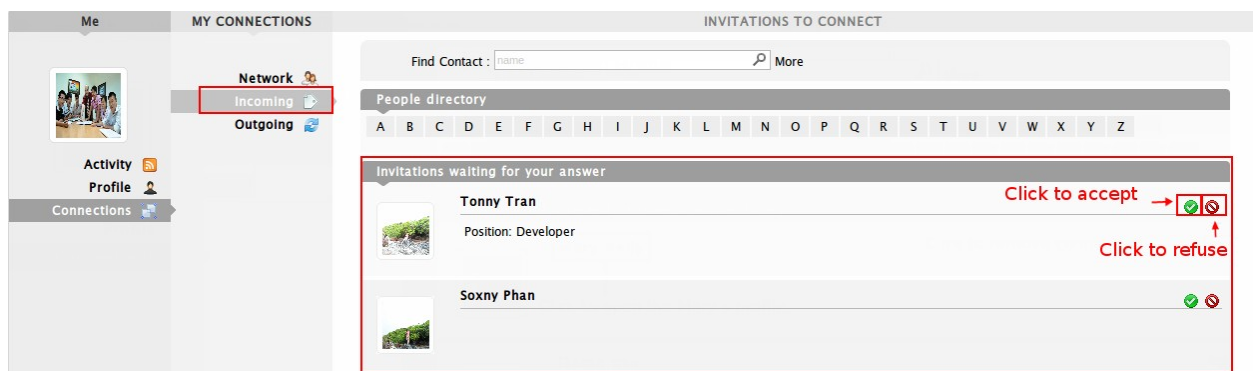



The 1st way: Click  corresponding to your desired user to delete the connection.

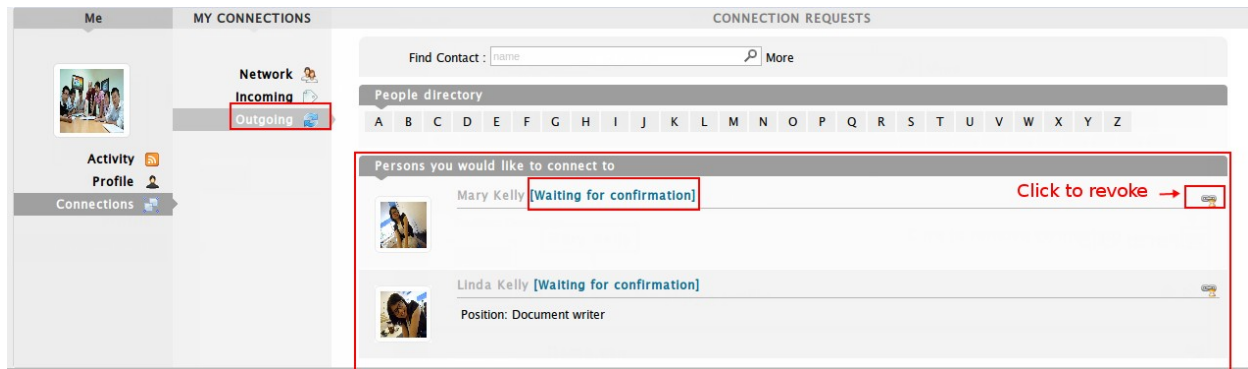
The 2nd way: Click the name of user to go to the user's profile and then click the **Disconnect the connection to Mary** text to remove the connection.



The **Incoming** pane lists users inviting you to connect with them. You can click  to accept being as his/her contact or click  to refuse.



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

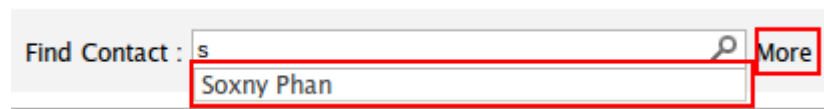


3.2.1 Search contacts

Click People. All contacts who use eXo Social will be listed in the **People** page.

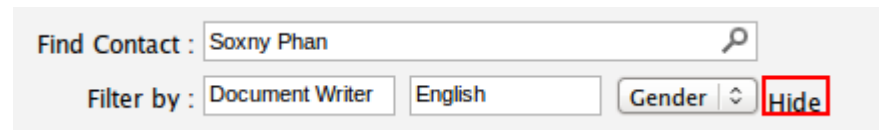
The function enables users to search contacts conveniently as follows:


1. Enter the contact name you want to search in the **Find contact** field. With the auto-suggest feature, you only need to enter the first letter of contact name and select the suggested names if you see it right.



i. If you want to filter a contact with more information, click **More**. You can specify a contact filtering by position, skills and gender.

ii. If you do not want to filter contacts by above information, click **Hide**.



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



3.2.2 Send requests

1. Hover your mouse on **People** on the administration bar, then select **Directory**. All users will be listed in the **People Found** pane.

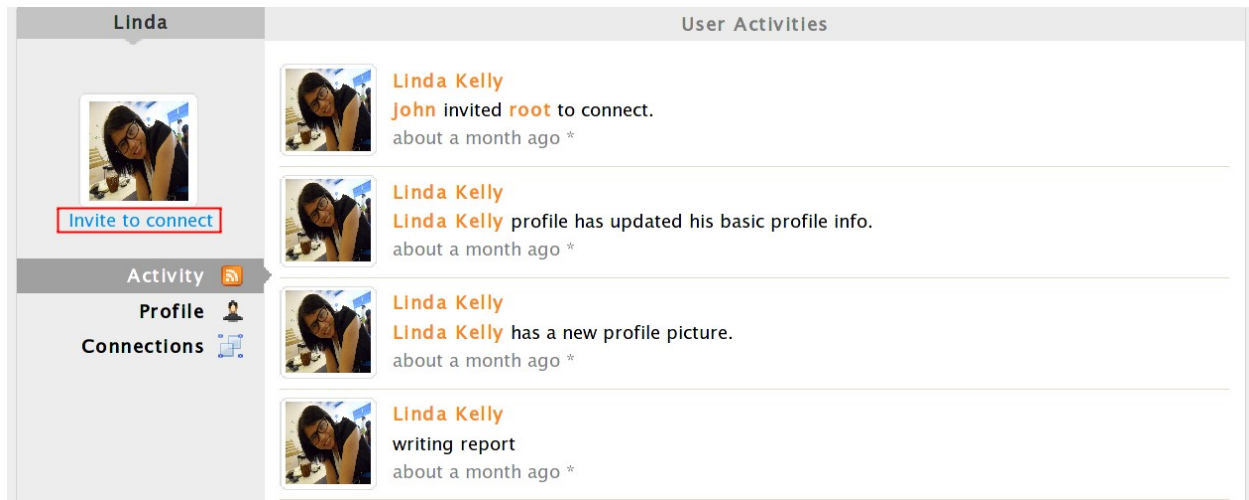
The screenshot shows the 'People Found' pane with a list of users. The first user, Linda Kelly, is highlighted with a red box around her name. A red arrow points from the text 'The second way' to this box. Another red arrow points from the text 'The first way' to a small icon in the top right corner of the user's profile card. The list includes the following users:



People directory																									
A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z
People Found																									
	Linda Kelly ← The second way Position: Document writer The first way →																								
	Tonny Tran Position: Developer																								
	Mary Kelly [Invited to connect]																								
	Soxny Phan Position: Document writer																								


2. Invite your desired contact via one of two ways:



The 1st way: Click to send your connection request.

The 2nd way: Click the name of contact to go to his/her profile and then click **Invite to connect** below the avatar in the left pane.



The text **[Invited to connect]** will be displayed next to the contact name and the icon  will be turned into the icon  automatically. This means that your connection request is in the pending status until the invited contact confirms it.

To remove your request, simply click  or click the name of contact and select **Revoke** under the avatar in the contact's profile.

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

3.3 Manage Activities

To enter **Activities**, hover your mouse over the User Profile (for example, Jonny Nguyen) on the administration bar and select **Activities**:




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

3.3.1 Update status

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

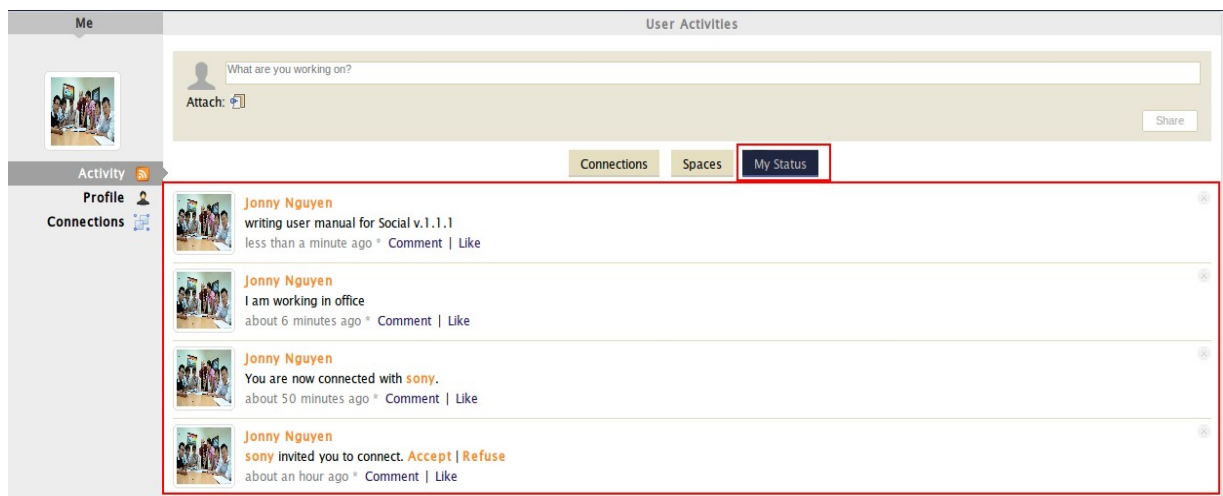


I am working in office

Attach: 

Share


2. Click **Share** to accept sharing your status.
3. Click **My Status** below the **Status Update** form to see your own activities.



Me

User Activities

What are you working on?

Attach: 

Share

Connections Spaces **My Status**

Activity Profile Connections

Jonny Nguyen
writing user manual for Social v.1.1.1
less than a minute ago * Comment | Like

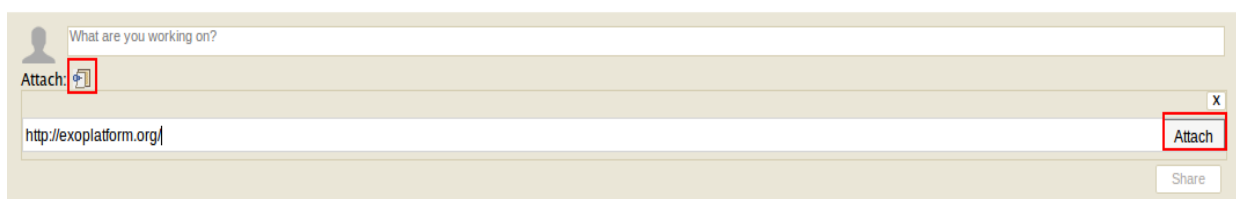
Jonny Nguyen
I am working in office
about 6 minutes ago * Comment | Like

Jonny Nguyen
You are now connected with **sony**.
about 50 minutes ago * Comment | Like


Jonny Nguyen
sony invited you to connect. **Accept | Refuse**
about an hour ago * Comment | Like

3.3.2 Share links

1. Click the **Attach** icon  .



What are you working on?

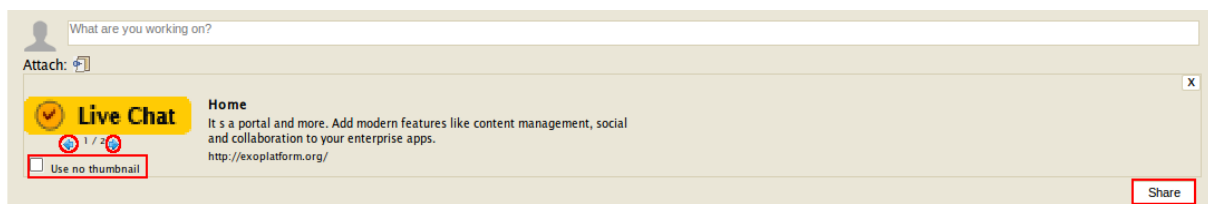
Attach: 

http://exoplatform.org/


Attach

Share

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** icon with the overall introduction.



What are you working on?

Attach: 

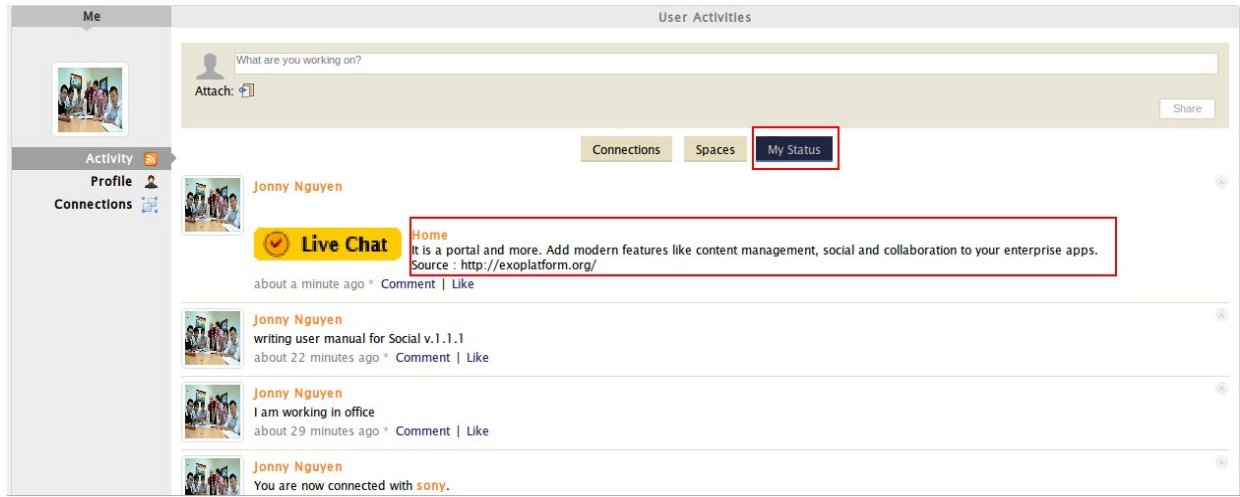
Live Chat
Home
It's a portal and more. Add modern features like content management, social and collaboration to your enterprise apps.
http://exoplatform.org/

Use no thumbnail


Share

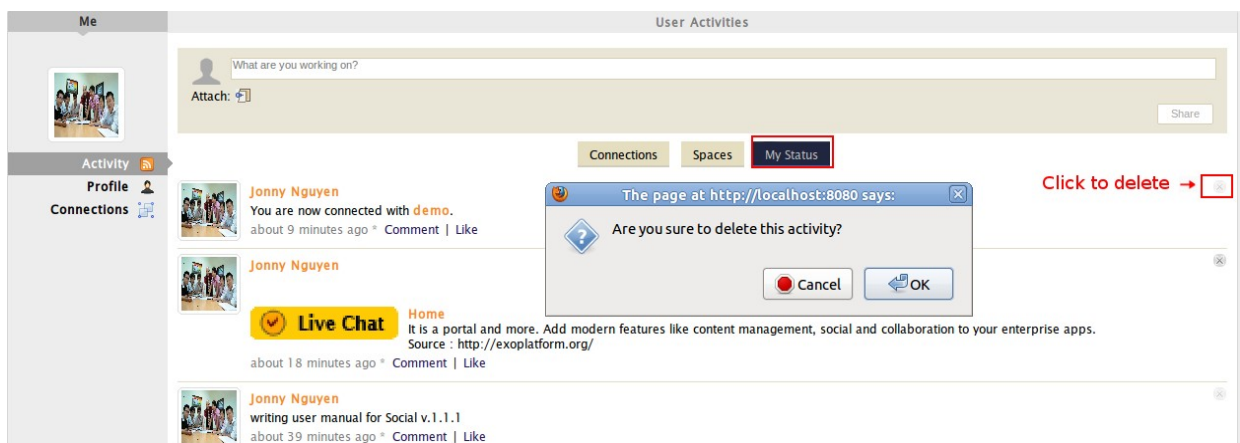
If you do not want the thumbnail to be displayed, select the **Use no thumbnail** checkbox. Similarly, deselect the checkbox to display the thumbnail. Also, if there is more than one thumbnail, you can click blue arrows to change the thumbnail.

3. Click **Share** to share with your connections. The link will be displayed in the **My Status**:



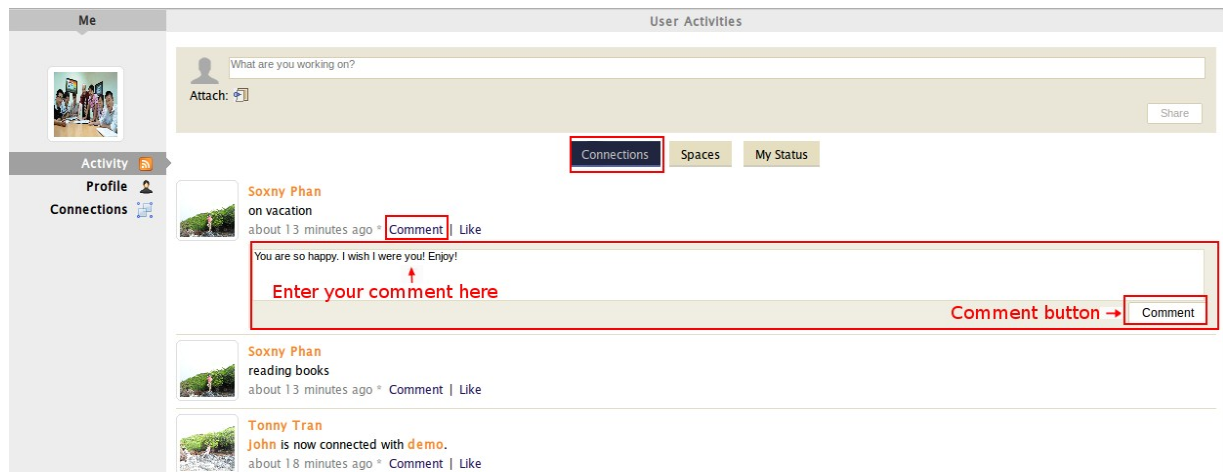
3.3.3 Delete activities

1. Click **My Status** to view all your own activities.
2. Choose one profile containing the activity you want to delete, then hover your mouse and click the icon . The confirmation message will be displayed.
3. Click **OK** to accept deleting your selected activity.



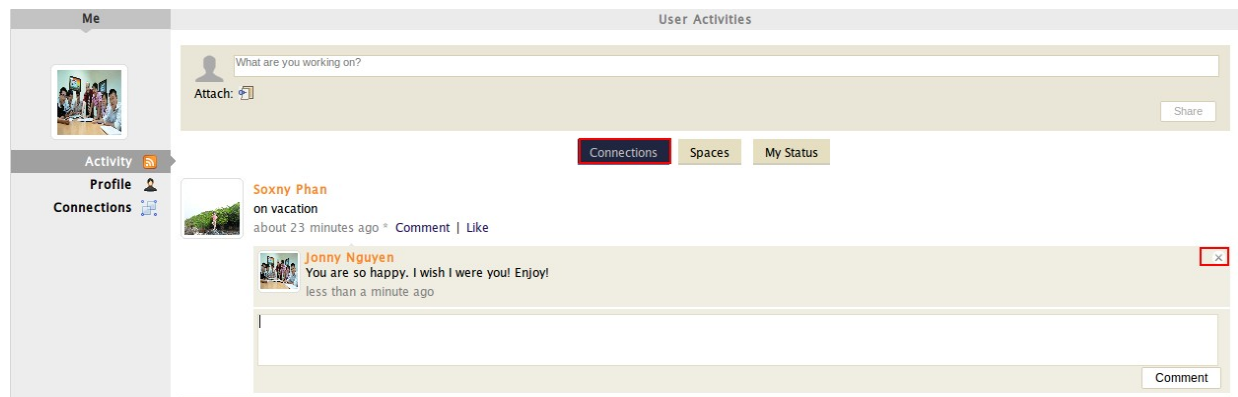
3.3.4 Comment on activities

1. Click **Connection** below the **Status Update** to see all activities of your established contacts.
2. Select one profile containing the activity you want to comment.
3. Click **Comment** in the bottom line of the profile. The **Comment** form will appear as below.



4. Enter your comment into the **Comment** form and press the **Comment** button.

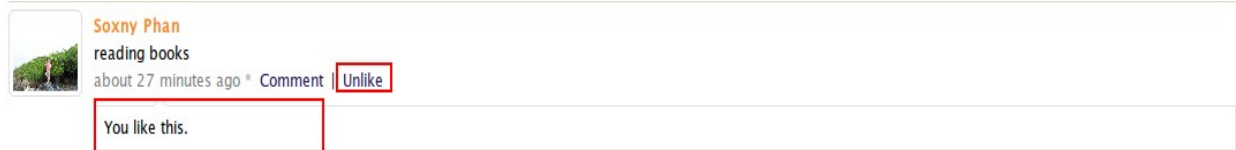
Your comment will be displayed right below the profile and you can delete it by clicking .



3.3.5 Like/Unlike activities

1. Choose the profile containing the activity you want to like or unlike.
2. Click **Like** beside **Comment**.

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



You can **Unlike** one activity in the same way as steps when selecting **Like**.

4 Space: Community Management

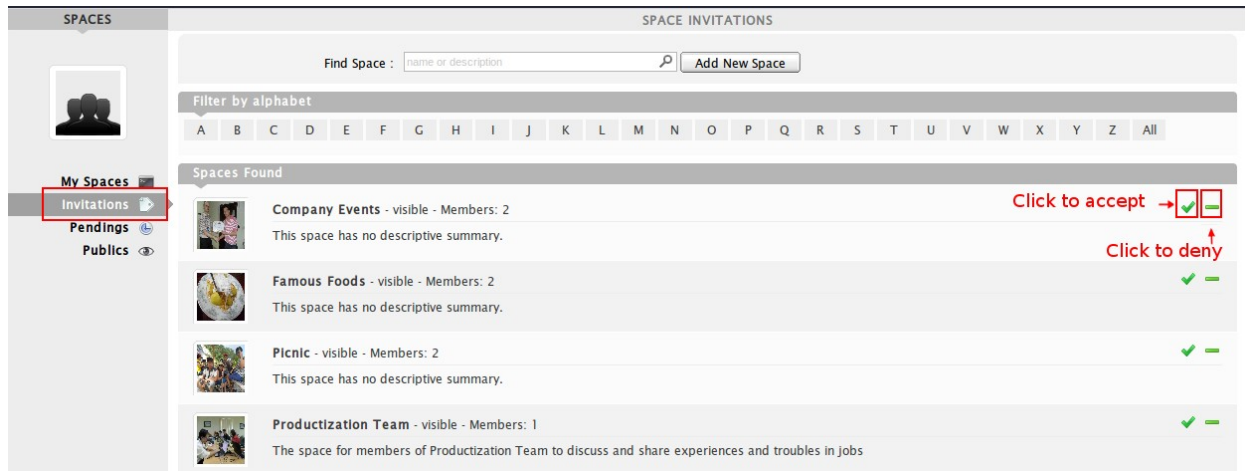


Before using the eXo Space, you should have basic knowledge of GateIn. Before reading further, you need to learn how to login and navigate in GateIn.

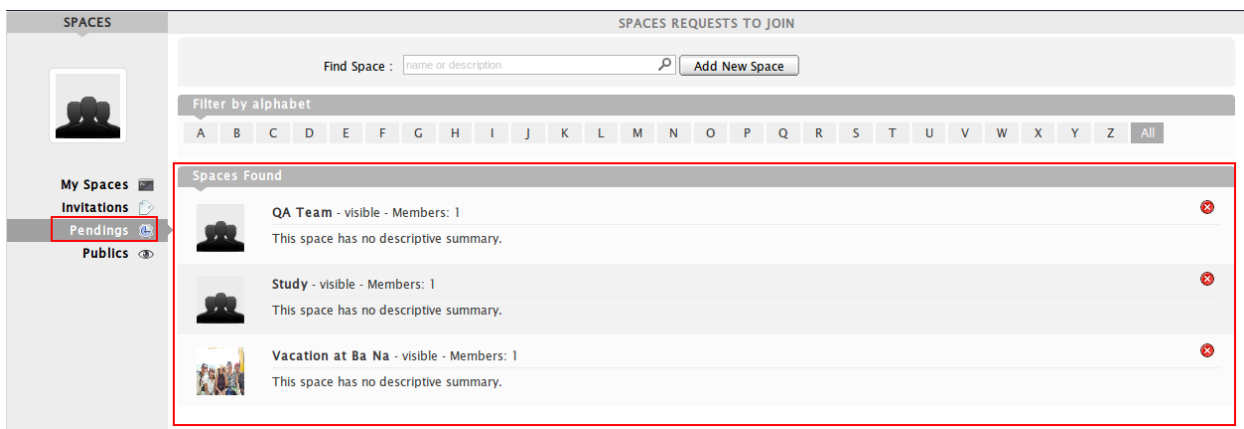
To enter a space, click **Spaces** on the administration bar. The **Space** navigation on the left pane includes:

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

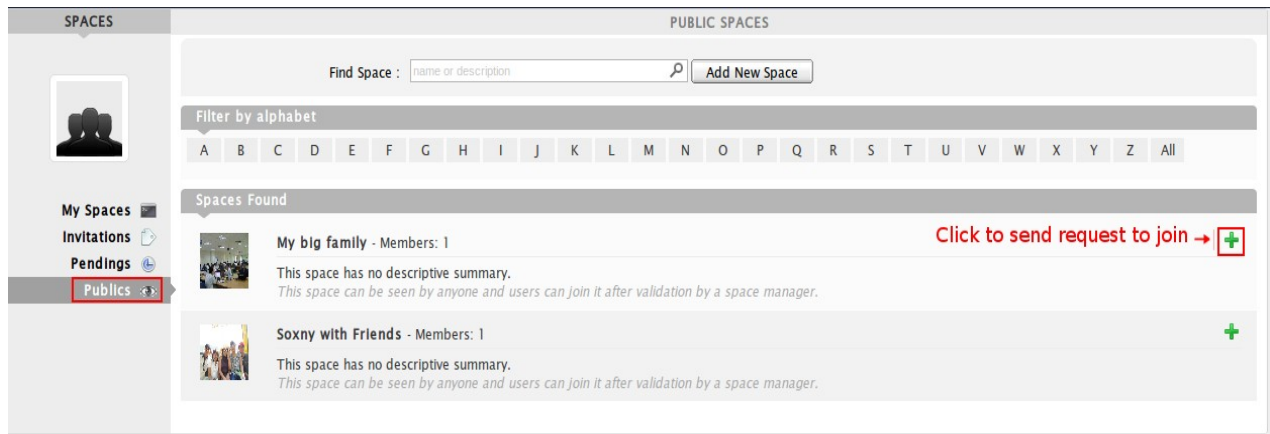
- **Invitations:** lists spaces where you are invited to become members by space managers.



- **Pendings:** lists spaces where you have requested to become their members.



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



In the eXo Social, the administrators, who has the highest permission, can see all spaces whether they are members or not.

4.1 Create new spaces

1. Click **Add New Space** to open the **Add New Space** form.
2. Enter values for fields in the **Add new space** form.

The screenshot shows a window titled "UISpaceAddForm" with three tabs: "Settings", "Visibility", and "Invite users from group". The "Settings" tab is active. It contains three input fields: "Name" with the value "Famous Foods" and an asterisk indicating it is required; "Priority" with a dropdown menu showing "Intermediate"; and "Description" with the text "Where to discuss and share famous foods in Vietnam.". A tooltip is visible over the "Priority" dropdown, stating "(Space will be listed in the middle of the space list)". At the bottom of the form is a "Create" button.

Details:

The **Settings** tab includes:

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



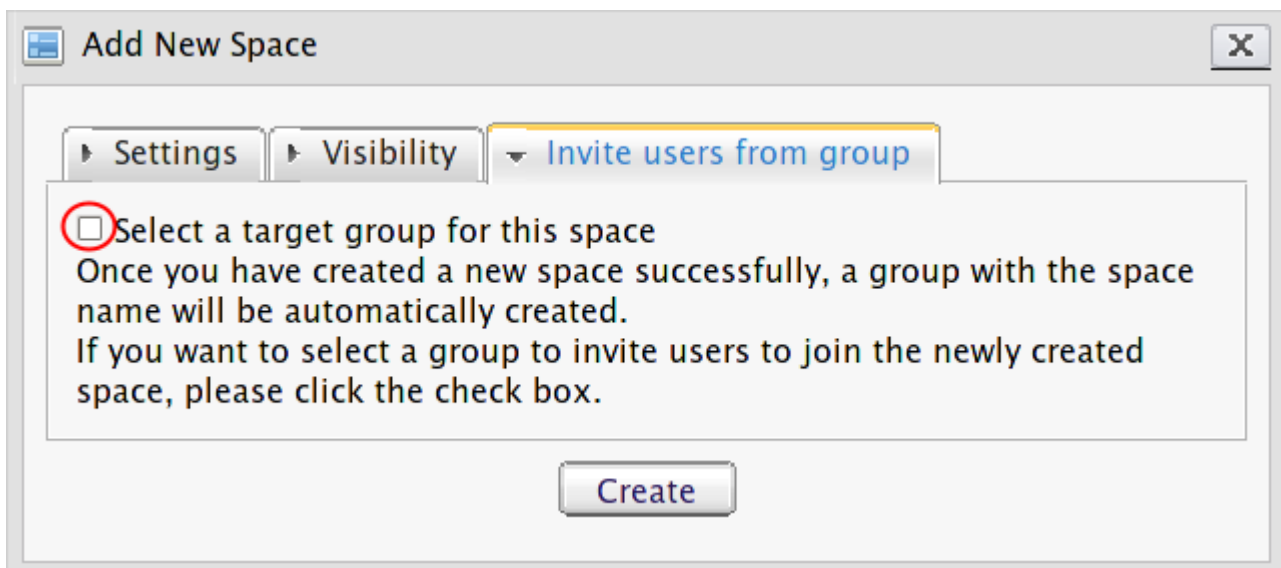
When you input more than two space characters between words, these spaces will be converted to ONLY ONE space when being displayed. With space characters at the beginning and end of space names, these space characters will be omitted.

The **Visibility** tab:

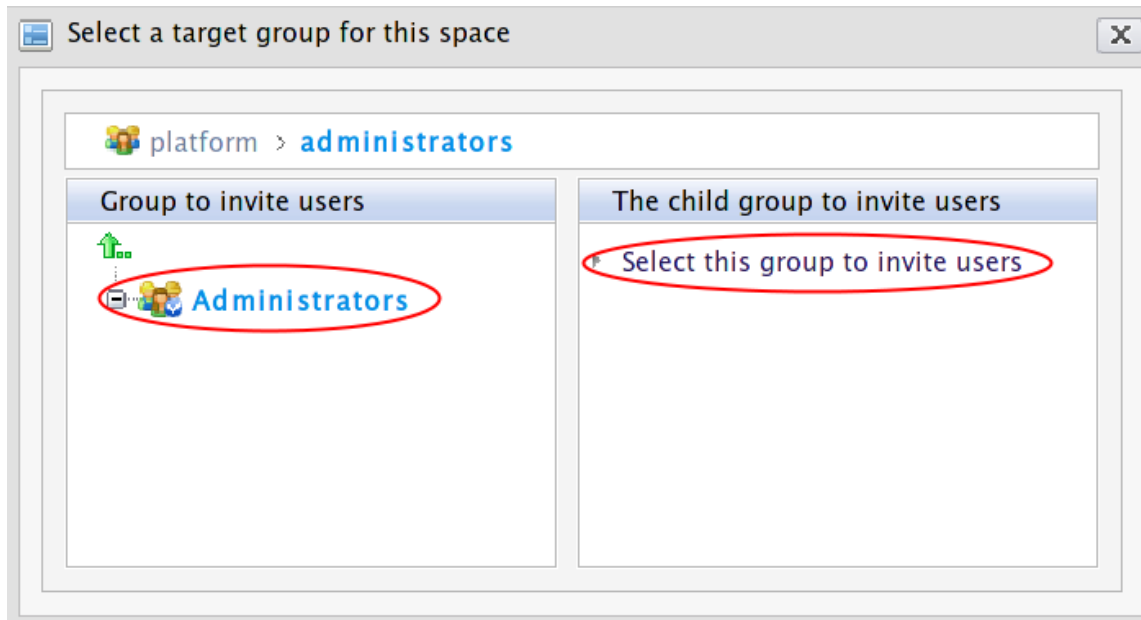
Visibility	By default, the Visibility value is set to be Visible . This means this space is listed in the public spaces directory. If Hidden is selected, this space will not be listed in the public spaces directory.
Registration	By default, the Registration value is set Validation . If Open is checked, 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 **Invite users from group** tab: enables you to select one target group ONLY for your space where you are already 'manager'. There will be **TWO** instances when you select the **Invite users from group** tab.

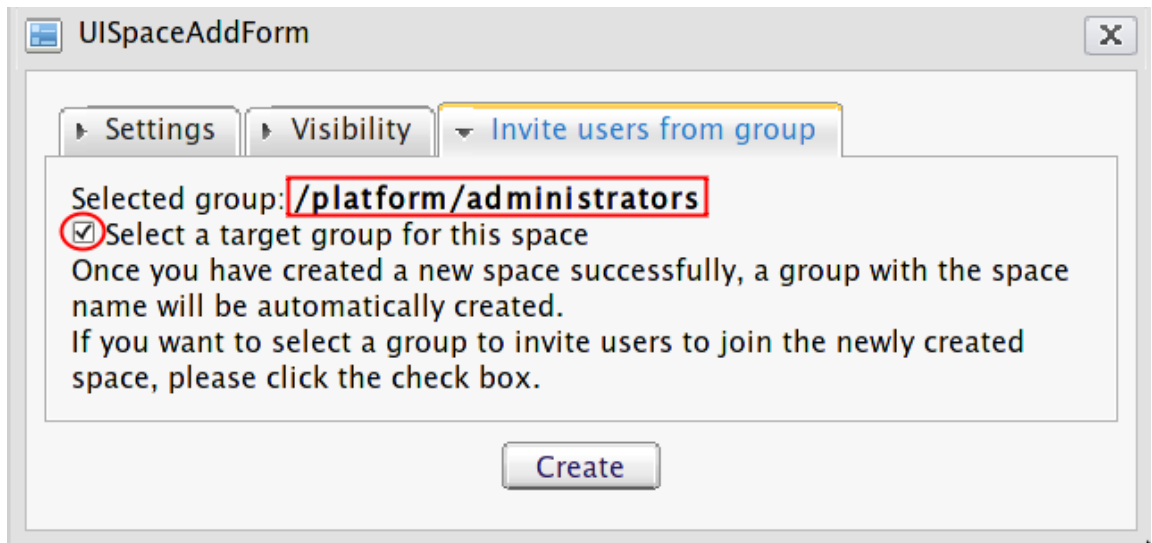
The 1st instance: If you have been already manager of any group, the **Invite users from group** tab will be displayed as below:



- i. Tick the **Select a target group for this space** checkbox to open the selection form.
- ii. Select the group in the left pane and then click the **Select this group to invite users** text in the right pane to accept your selection.

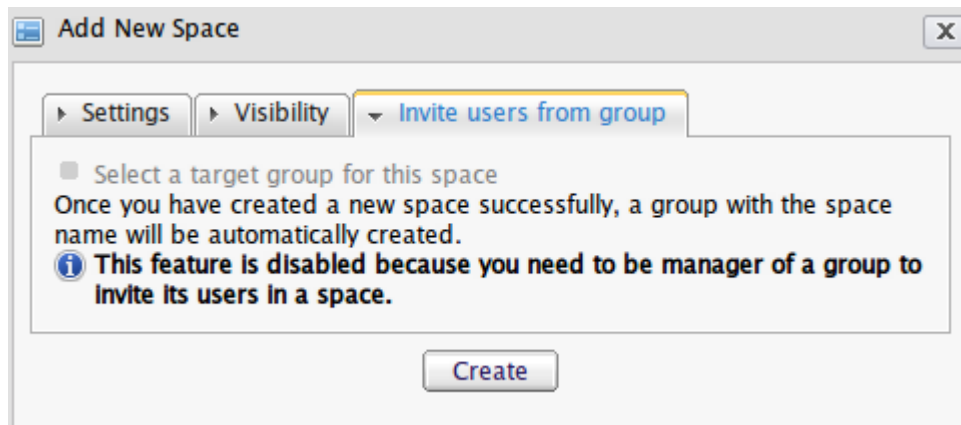


You will see your selected group as below:



iii. Deselect the **Select a target group for this space** checkbox to remove your selected groups.

The 2nd instance: If you have not been a manager of any group, you can not select a target group as described in the illustration below:



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


You will see your new space in the spaces list. Click and start exploring the space.



After being created, your space will be automatically added to the drop-down menu of **Spaces** from the administration bar. You can access this space by clicking there.

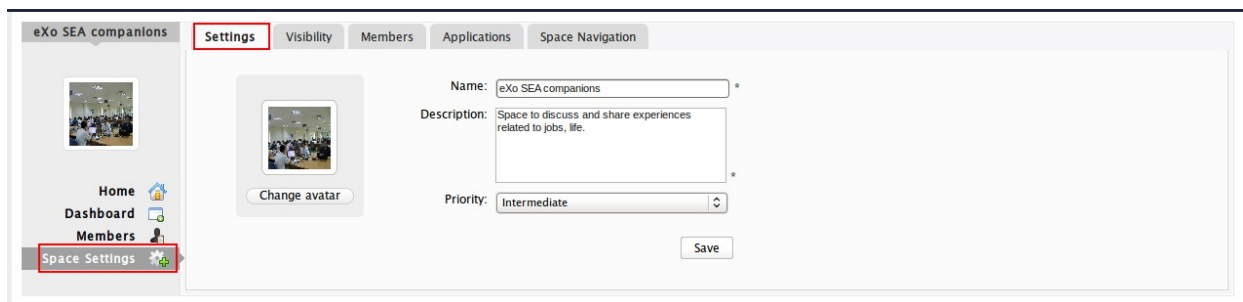
4.2 Edit space settings

This function enables you to change information of a space, manage members and applications if you are the space's creator or have a manager right on it. To enter the Space Settings, simply click

the edit icon  that corresponds to the space which you have the edit right.

4.2.1 Change space's information

1. Choose the **Settings** tab in the **Space Settings**.



2. Change information you want to edit.

Details:

Name	The current name of space is required, so you cannot leave it blank.
Description	The brief description about the space that cannot be left blank.
Priority	The priority affects the space order in the space list.

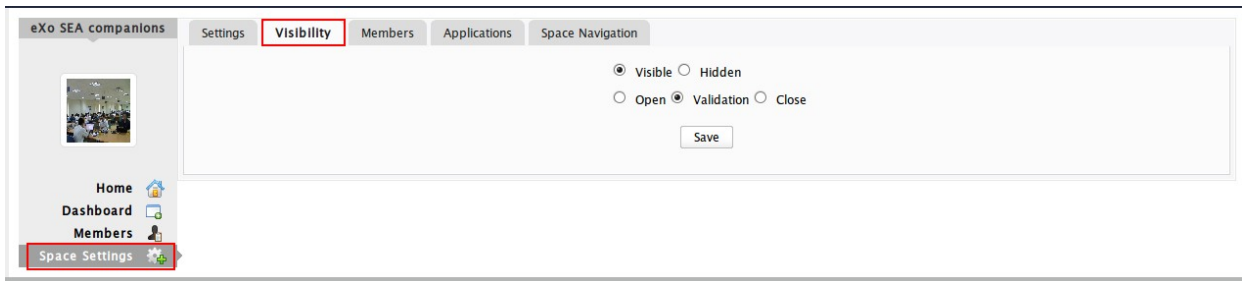
3. Click **Save** to accept all changes.

4.2.2 Change space avatar

To change the space avatar, refer to the section 3.1.1.

4.2.3 Manage visibility

1. Select the **Visibility** tab.

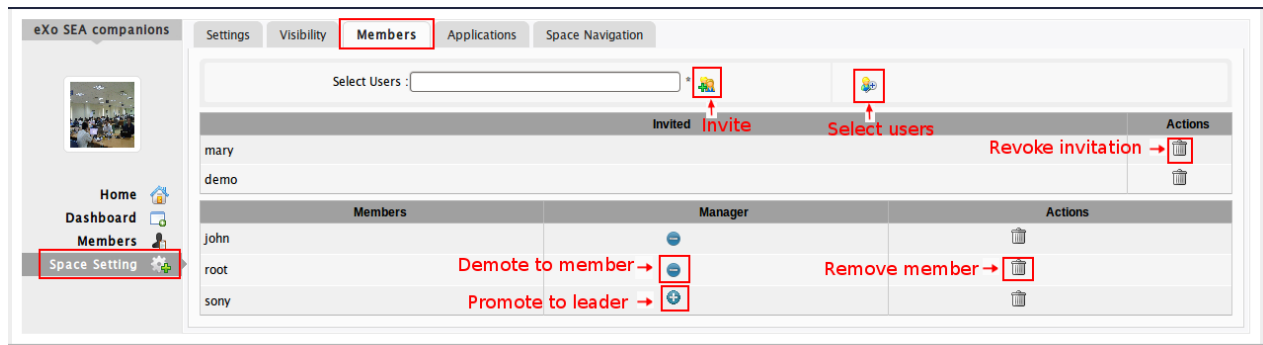


2. Change the **Visibility** and **Registration** modes to your needs. By default, **Visibility** is **Visible** and **Registration** is **Validation**. This means that your created spaces will be in the public mode and can be seen by other users.

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

4.2.4 Manage members


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




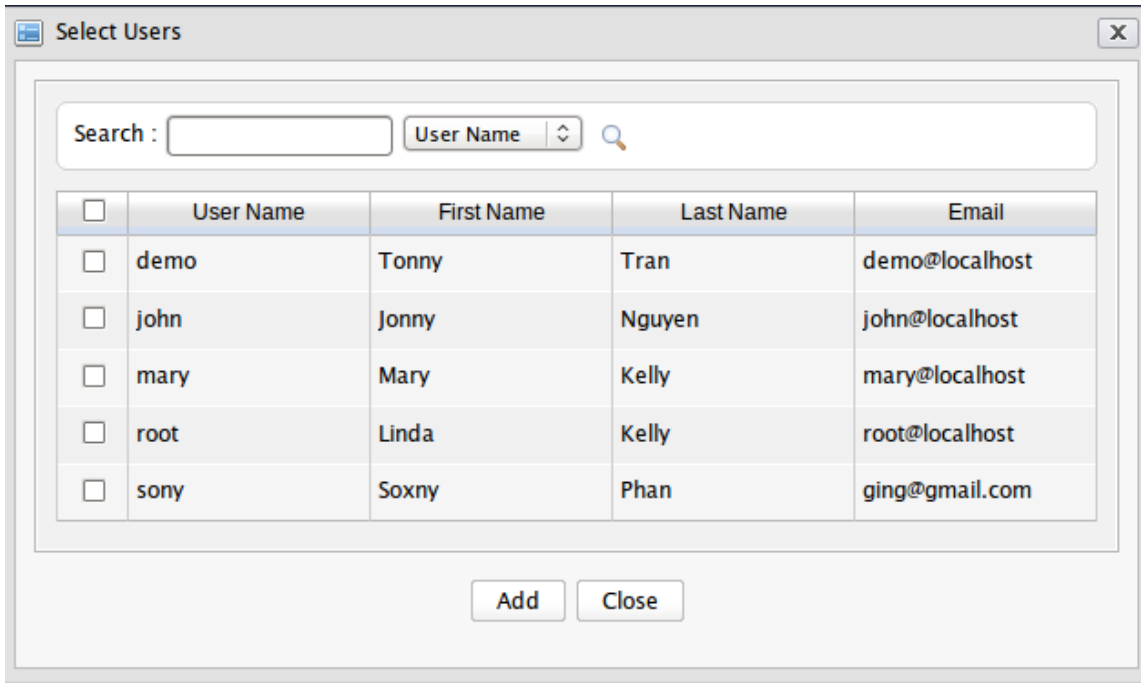
In this tab, you can take the following actions:

- Invite new members to join this space.
- Revoke invitations.
- Accept/Deny invitations.
- Promote/Demote users.
- Remove members.

4.2.4.1 Invite new members

1. Enter your desired username in the textbox and click . If you have multiple people to invite, you can enter multiple usernames separated by a comma.

If you do not know the username of a person who you want to invite, you can click  to open the **Select Users** form:



<input type="checkbox"/>	User Name	First Name	Last Name	Email
<input type="checkbox"/>	demo	Tonny	Tran	demo@localhost
<input type="checkbox"/>	john	Jonny	Nguyen	john@localhost
<input type="checkbox"/>	mary	Mary	Kelly	mary@localhost
<input type="checkbox"/>	root	Linda	Kelly	root@localhost
<input type="checkbox"/>	sony	Soxny	Phan	ging@gmail.com

2. Search among members of a portal as follows:

- Enter a search term in the **Search** box.
- Select a criterion you want to find in the combo box next to this **Search** box.
- Click the glass icon to perform searching.

The results will be listed in the table below. Select users by ticking the corresponding checkboxes and click **Add**.

Then, click  to invite your selected users. After inviting, you will see the list of invited users.



You can invite multiple users which will be separated by comma in the **Select Users** field.

4.2.4.2 Revoke invitations

If your invited users have not accepted your requests, you can revoke your invitations by clicking



. The users will be removed from the **Invited** list column.

4.2.4.3 Accept/Deny invitations

This function enables you to accept and/or deny invitations that you received from others.

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

The screenshot shows the eXo Social interface. The top navigation bar includes 'Jonny Nguyen', 'People', 'Spaces' (highlighted), 'Dashboard', and 'Site Editor'. The left sidebar shows 'My Spaces' with 'Invitations' (highlighted), 'Pendings', and 'Publics'. The main content area is titled 'SPACE INVITATIONS' and includes a search bar, a filter by alphabet dropdown, and a list of spaces found. The 'Company Events' space is highlighted, showing 'visible' status and 2 members. The 'Famous Foods' space is also highlighted, showing 'visible' status and 2 members. The 'Picnic' space is listed below. The interface includes a search bar, a filter by alphabet dropdown, and a list of spaces found. The 'Invitations' tab is highlighted in the left sidebar.


If you want to accept, click . If not, click .

4.2.4.4 Promote/Demote a member


The screenshot shows the eXo Social interface. The top navigation bar includes 'Settings', 'Visibility', 'Members' (highlighted), 'Applications', and 'Space Navigation'. The left sidebar shows 'Home', 'Dashboard', 'Members', and 'Space Setting' (highlighted). The main content area is titled 'Members' and includes a search bar, a filter by alphabet dropdown, and a list of members found. The 'demo' and 'mary' members are listed under the 'Invited' column. The 'john', 'root', and 'sony' members are listed under the 'Members' column. The 'john' member is highlighted, showing 'Click to remove the manager role ->' and a minus icon. The 'sony' member is highlighted, showing 'Click to promote to manager ->' and a plus icon. The interface includes a search bar, a filter by alphabet dropdown, and a list of members found.

To promote a member to the manager position, click in the **Manager** column. The user will be

automatically promoted as a manager in the current space.

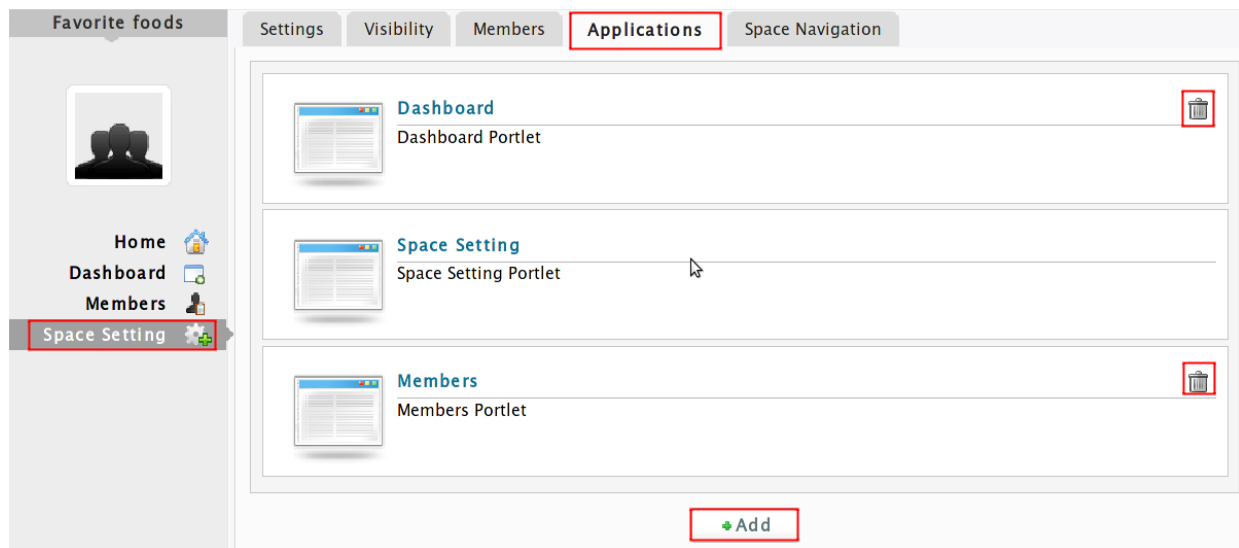
To demote a member, click . Be careful not to remove the rights for yourself; otherwise, you will not be able to edit settings anymore, except that you are an administrator.


4.2.4.5 Remove members

To remove members, simply click the corresponding  in the **Actions** bar.

4.2.5 Manage space applications

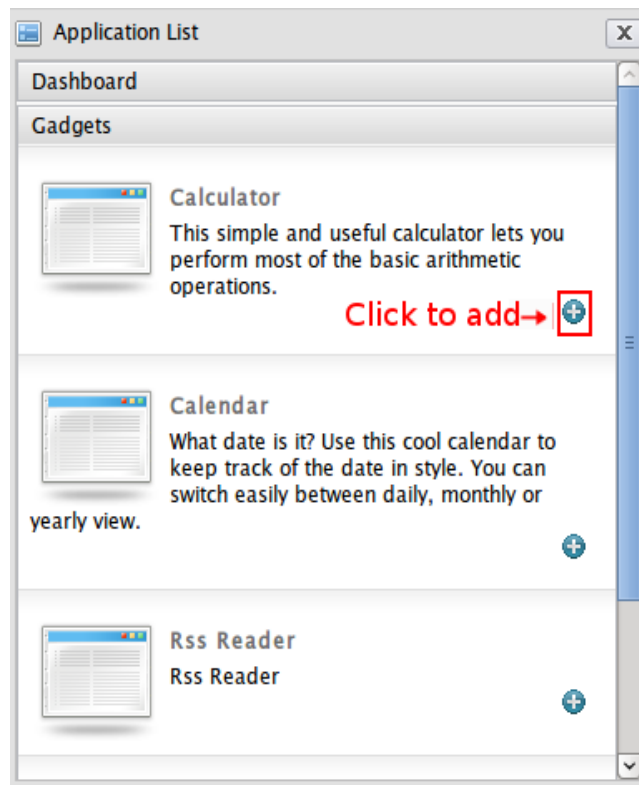
To manage space applications, click the **Applications** tab to open the applications list:



To remove an application, just click  next to the application name. You cannot delete the **Space Setting** application because it is set as default.

4.2.5.1 Add new space applications

1. Click **Add** to open the available applications list:



2. Select the application you want to install by clicking the corresponding icon  .

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

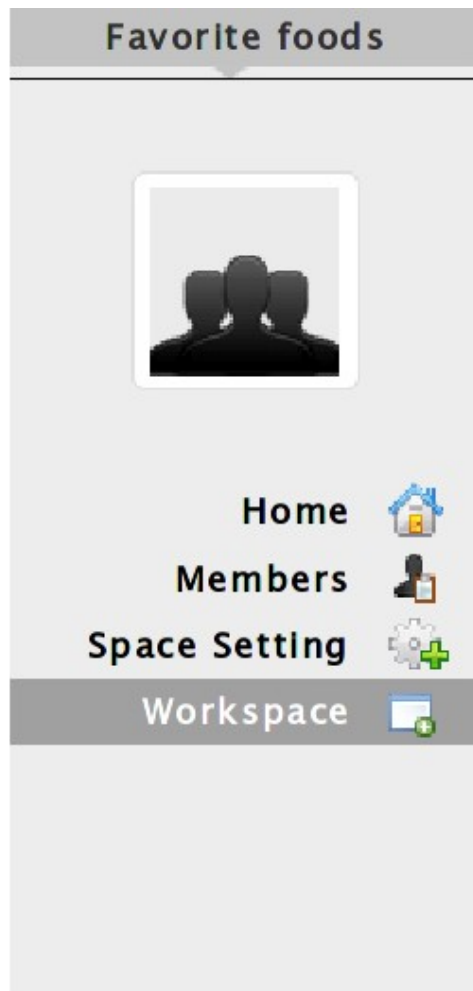
4.2.5.2 Rename space applications

You can rename your added applications and the **Dashboard** application listed in the right pane as follows:

1. Click the relevant application.
2. Double-click the selected application until the input text box is displayed as below:

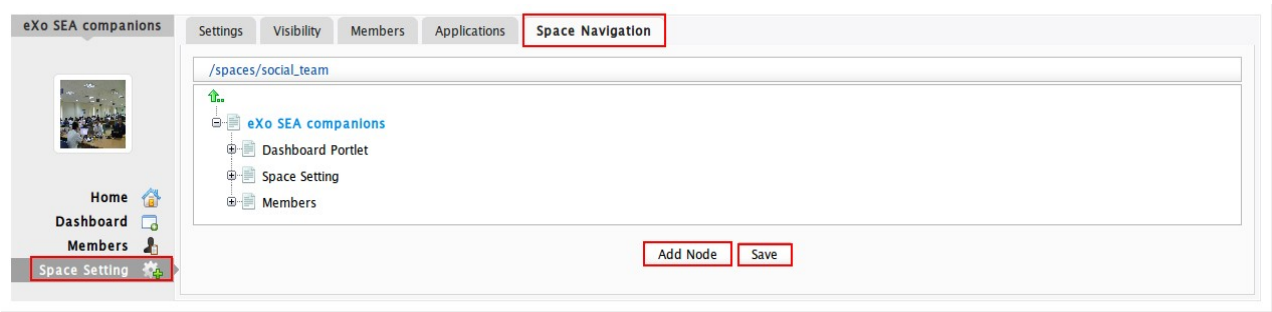


3. Enter the new name into the input textbox, for example "**Workspace**" and press **Enter** to save your new name. The position of applications will be changed to the alphabetic order.



4.2.6 Edit space's navigation

1. Click the **Space Navigation** tab to open the space's navigation:




Users can take the following actions:

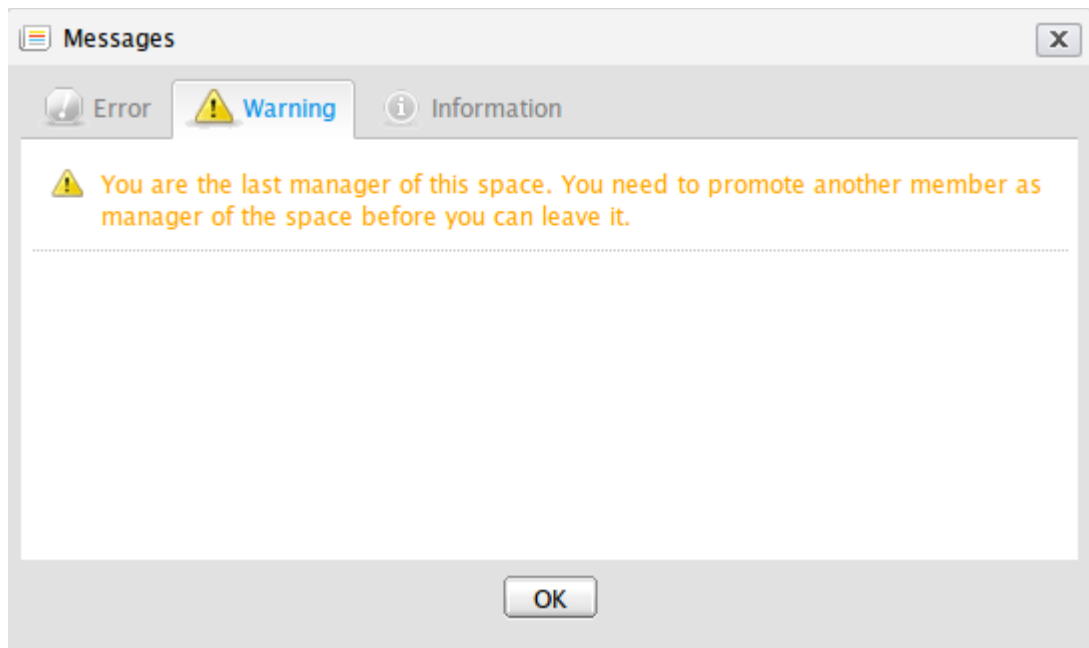
- Right-click the node name (space name) to add a new node, edit a node, edit a node's page, copy a node, clone a node.
- Click **Add Node**.

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

4.3 Leave spaces

You can quickly leave the space where you do not want to stay anymore or to be the space's member by clicking  .

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




However, when you are only a member invited by the leader, you can leave the space by clicking



After you have left a space, the space will not exist in **My Spaces**, but in **Publics** in the left pane.

4.4 Delete spaces

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