



GateIn User Guide

Version 3.1

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1 Preface

1.1 Overview

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

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

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

1.2 Purpose of the guide

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

1.3 References

Information

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

Support

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

2 Get Started

2.1 Glossary

2.1.1 Portal

Portal is a key web-based environment for aggregating and personalizing information via specific portlets with an interactive and consistent look and feel. Users and administrators are able to integrate information, people and processes via a web-based user interface.

2.1.2 Portlet

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

Portlets can be divided into two following types:

- Functional Portlet
- Interface Portlet

2.1.3 Toolbar

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



2.1.4 Navigation

Navigation are nodes (so-called menus) containing hyperlinks to other parts of a portal. The default navigation menus in GateIn 3.1 are located in the Toolbar. There are three navigation types:

Site: This navigation links to separate sites of the parent Portal. Each site has only one navigation and it is automatically generated when the site is created.

Group: The content of this navigation differs, depending on the type of account logged in.

- If logged in as the user account, this navigation holds personal links set up by that user.
- If logged in as the manager account, this navigation contains links to pages for registered users and administrative tasks and personal links.
- If logged in as the administrator account, the navigation adds further management capabilities, such as Internationalization and community management.

Dashboard: Each user has own navigation 'Dashboard' containing links and portlets (or gadgets) that the user has selected. A user's navigation is created automatically when the new account is registered. This navigation only can be deleted when the user is deleted.

Site/Group Editor: This navigation only appears in the toolbar when you logged in as an administrator. When in areas of the portal displaying content, the navigation shows as **Site Editor** and in areas of the portal pertaining to users, the navigation shows as **Group Editor**.

This navigation contains links to add new pages to the portal, to edit a page or to change the portal's layout.

2.1.5 Gadget

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

To learn about default gadgets in GateIn 3.1, refer to the section "Use the Dashboard Workspace".

2.1.6 Modes

GateIn 3.1 offers two access modes by default:

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

2.1.7 Permission

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

- **Permission types** define what a user can do within the portal.

Access Permission

This permission enables users to utilize portal contents, such as signing in, viewing contents, rearranging portlets. This permission can be set for multiple member groups.

Edit Permission

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

- **Permission levels** specify where the users's permission types can be applied in the portal.

Portal

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

Page

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

Portlet

The permission at portlet level enables users to create a page through dragging and dropping portlets into a page. Some portlets are only used for administrators, while some are for individuals. Thus, administrators need to set proper access permissions for each specific group. Permission types and levels can be effectively implemented to control who can do and what can be performed within the portal.

2.2 Accounts


2.2.1 Register new accounts

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

1. Click **Register** on the top right corner of GateIn homepage.
2. Enter values into fields of the **Register New Account** form. The asterisk (*) mark indicates mandatory fields.

Register New Account

Click to check if user name is available

User Name: 


Password: *

Confirm Password: *

First Name: *

Last Name: *

Email Address: *

Text validation: 

*

Details:

- User Name:** The name used to login that must be unique with at least three characters. Only alpha, digit, and underscore characters are allowed.
- Password:** The authentication string must be between SIX and THIRTY characters, including spaces.
- Confirm Password:** Retype the password above. Values in both **Password** and **Confirm Password** fields must be identical.
- First Name:** The user's first name which must start with a character.
- Last Name:** The user's last name which must start with a character.
- Email Address:** The user's email that must be in the correct form, such as *username@abc.com*.
- Text validation:** The text to verify your registration.

3. Click **Subscribe** to accept adding a new account, or **Reset** to clear all entered values. Your registration is unsuccessful if one of the following messages appears:

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

After adding the new account, you should contact the portal your administrator to get appropriate permissions for your account.




1.

- The magnifying glass icon is to check if your entered user name already exists or not.
- Be sure to enter your email address correctly. In case of forgetting your username or password, you can recover it from this email.

2.2.2 Show/Hide text validation

This function is only for the portal administrator.

1. Enter the portal as an administrator.
2. Go to the **Register** portlet by entering the following URL:
`http://localhost:8080/portal/private/classic/register.`
3. Select **Site Editor** → **Edit Page** on the administration bar.
4. Hover your cursor over the area of **Register Portlet** and select  .
The **Edit Mode** will appear:

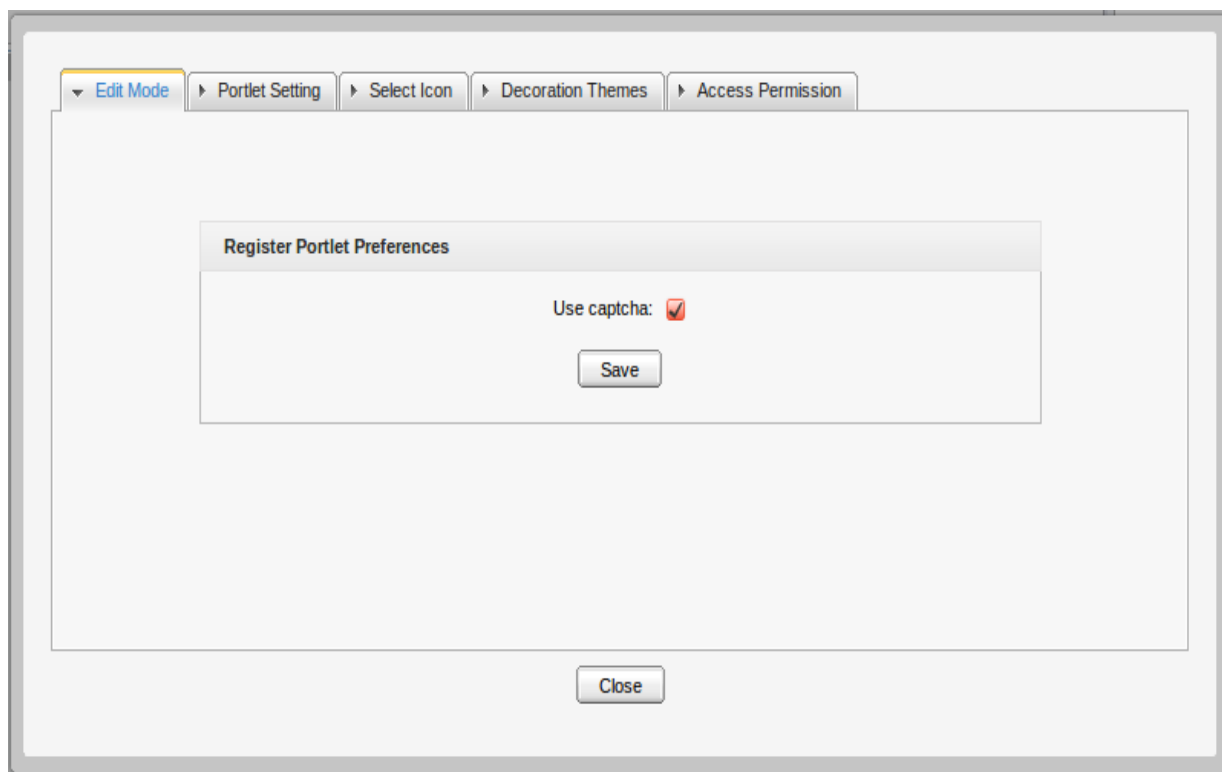



Illustration 1: Edit mode of register portlet

5. Select or deselect the **Use captcha** checkbox if you want to show or hide the validation text respectively and then click Save.
6. Click **Close**, then click  on the top right of **Page Editor** to take effect.



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

2.2.3 Sign in & Sign out

2.2.3.1 Sign in

With GateIn 3.1, you can sign in the portal via two ways:

The 1st way:

1. Click the **Sign in** link at the top right of the page.



2. Input your registered **User name** and **Password** in the **Sign in** form.

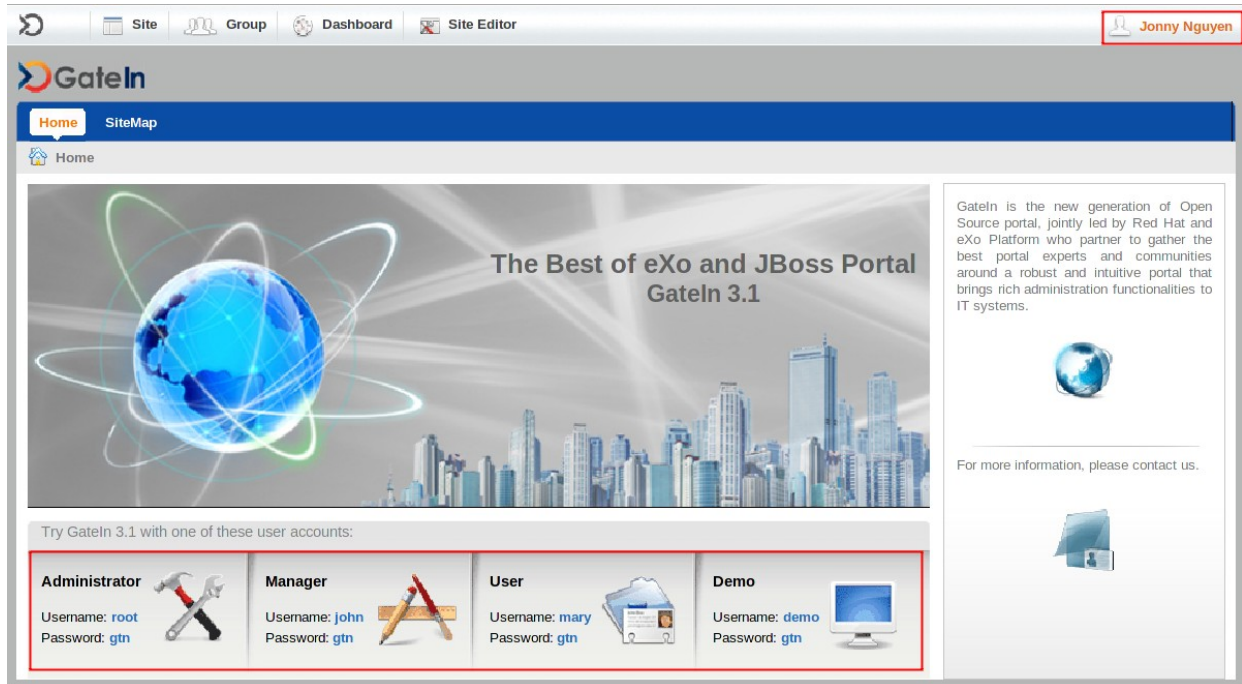
3. Select the **Remember My Login** checkbox for the first time if you want to automatically return to GateIn 3.1 without signing in again. This feature enables you to be automatically authenticated to avoid doing an explicit authentication when you access the portal.

4. Click **Sign in** to submit the form, or **Discard** to quit.



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

After signing in successfully, you will be redirected to the homepage and welcomed with your full name on the top right corner of the page.



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




Details:

- **root**, as an administrator, has the highest right in any portal. If you logged in as root, you can control all resources, such as users, groups, memberships, pages, navigations, portlets. Root can do anything in a portal except the private resources of another users.
- **john**, as a manager, can take some actions that are supported only for a manager.
- **marry** and **demo**, as visitors, can only visit and read news.

2.2.3.2 Sign out

This feature ends the authenticated session and returns the user to the anonymous

portal. To sign out, simply hover your cursor over  on the administration bar and select **Sign Out**.

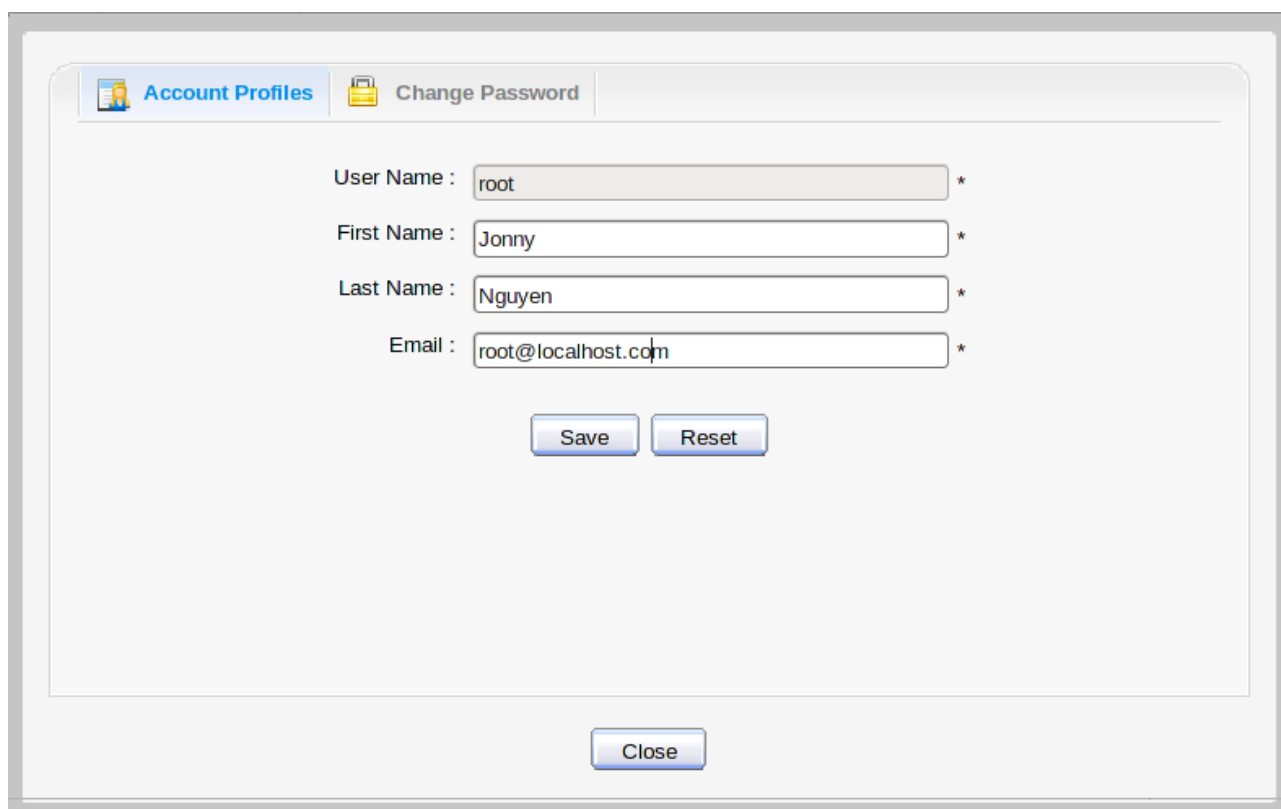


2.2.4 Change account settings

To change your account information, click directly your full name on the administration bar.



The **Account Profiles** form will appear:

A screenshot of the 'Account Profiles' form. The form has two tabs: 'Account Profiles' (selected) and 'Change Password'. It contains four input fields with labels and asterisks: 'User Name : root *', 'First Name : Jonny *', 'Last Name : Nguyen *', and 'Email : root@localhost.com *'. Below the fields are two buttons: 'Save' and 'Reset'. At the bottom of the form is a 'Close' button.

- Change your account information:
 1. Select the **Account Profiles** tab.
 2. Change your **First Name, Last Name, Email**. Your **User Name** can not be changed.
 3. Click **Save** to submit your changes.
- Change your password:
 1. Select the **Change Password** tab.
 2. Enter your current password to verify that you are the owner of this account.
 3. Enter your new password of at least **SIX** characters.
 4. Re-enter your password again in the **Confirm New Password** field.
 5. Click **Save** to accept changes.



If the default accounts' passwords have been changed, you can no longer sign in the portal by clicking the default accounts directly as stated in the 2nd way.

2.2.5 Retrieve account & password

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

1. Click the '**Forget your User Name/Password?**' link beneath the **Password** field when signing in.

This form offers two options:

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

Why are you are not able to login ?

We apologize for any inconvenience you're experiencing by not being able to access this website. To resolve this issue as quickly as possible, please follow the troubleshooting steps below.

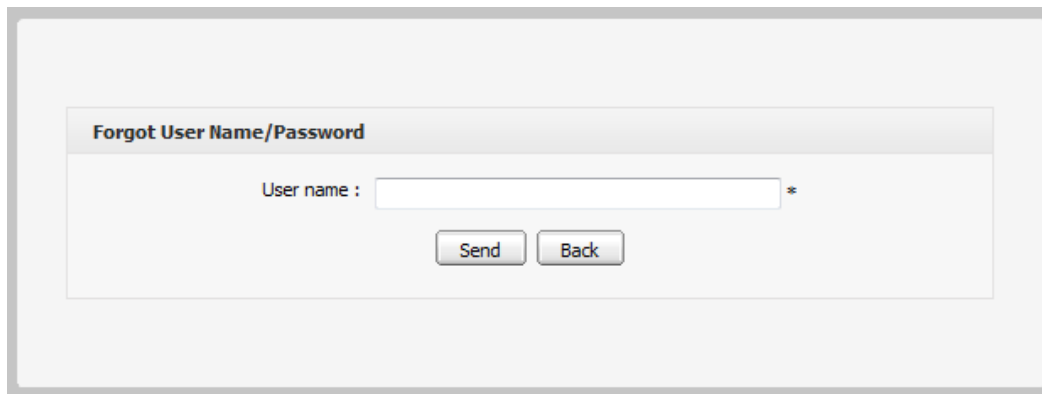
1. Recover your password: enter **your username** then click send.
2. Recover your username: enter **your email address** then click send.

☒ **Forgot my password**

☐ **Forgot my username**

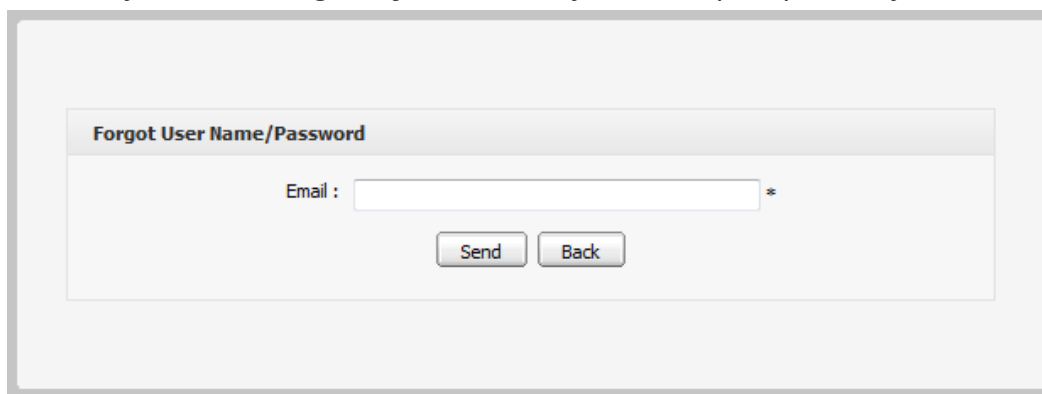
2. Select the appropriate option and click **Next**. You will be prompted to provide identification information, depending on your choice.

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



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

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



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

4. Enter your **Username/Email** in the form above.

5. Click **Send** to submit your entered values.

After you submit the form, an email will be sent to your email address with the requested information.

If you forget your password, you will be sent a new password temporarily. Your original password will not be valid after this email is sent. You will be directed to a page to update your password for the next time you sign in.

2.3 Manage language

GateIn 3.1 enables you to select your preferred language to the ascending priority order:

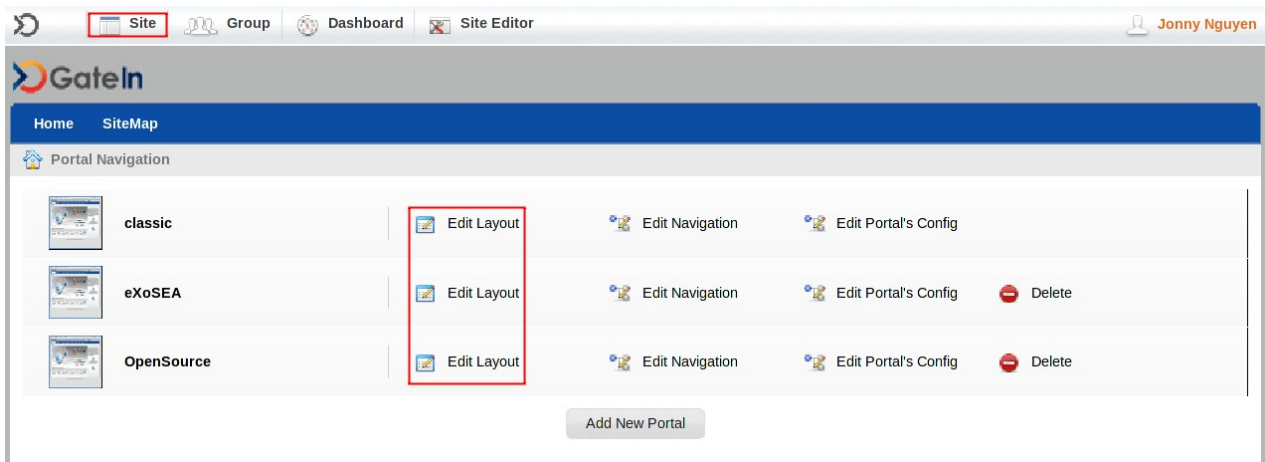
1. Portal's language
2. Browser's language
3. User's language.



Accordingly, you should pay attention to this order to switch the display language appropriately.

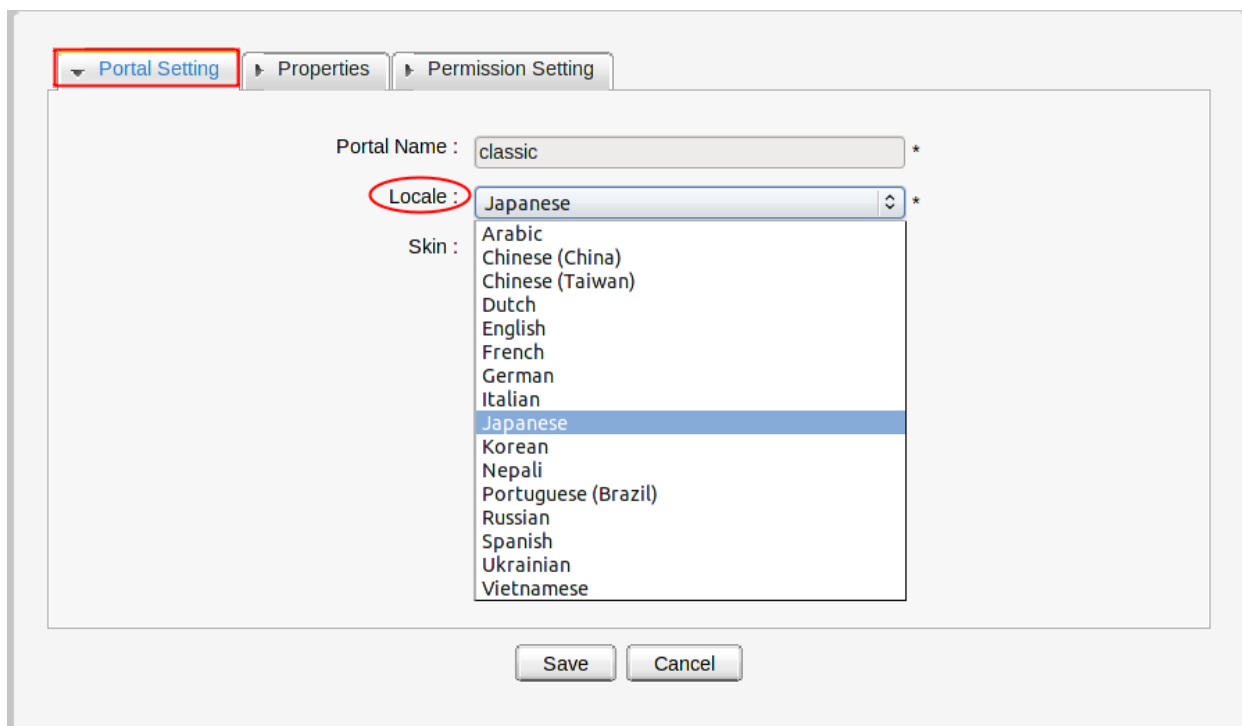
2.3.1 Change the display language permanently

The 1st way:

1. Click **Site** on the administration bar. The list of all portals will be displayed as below:



2. Click  **Edit Layout** corresponding to the portal you want to edit. The portal will be displayed in the edit mode.
3. Click  **Site's Config** to edit portal properties.
4. Change the display language of Portal by selecting another language in the **Locale** field in the **Portal Setting** tab.

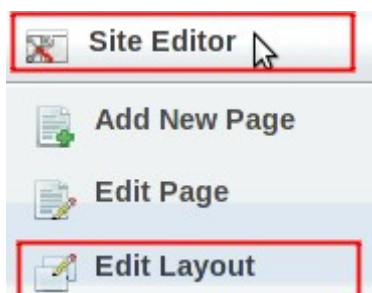


5. Click **Save** and select  to take affect.

The 2nd way:

1. Click **Site** on the administration bar and select your desired portal.

2. Click **Site Editor** and select **Edit Layout** in the drop-down menu:




The portal will be displayed as in the edit mode.


3. Change the display language similar as steps in the 1st way (steps 3, 4, 5).

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

1. Hover your cursor over  and select **Change Language** in the drop-down menu.

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

Interface Language Setting

Arabic	العربية
Chinese - China	中文 - 中国
Chinese - Taiwan	中文 - 台灣
Dutch	Nederlands
 English	English
French	Français
German	Deutsch
Italian	Italiano
Japanese	日本語

Apply

Cancel

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

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



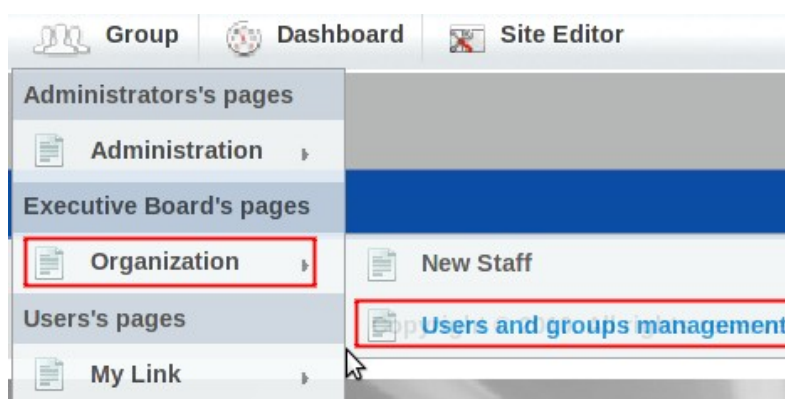
- The display language will be maintained permanently until you change another display language.
- When you set Arabic as your display language, the display language on Portal will be changed


to the Right to Left (RTL) direction because Arabic people usually read from right to left.

2.3.2 Change the display language for another user

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

1. Go to **Group → Organization → Users and groups management**.



2. Click  corresponding to the user with the display language you want to change.
3. Select the **User Profile** tab and change the display language of this user by changing the value of the **Language** field.

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

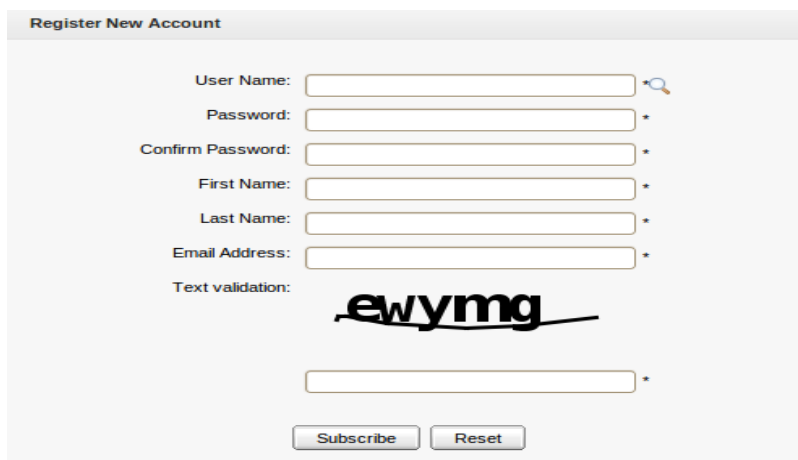
3 Portlets

3.1 Functional portlets

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

3.1.1 Register portlet

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



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

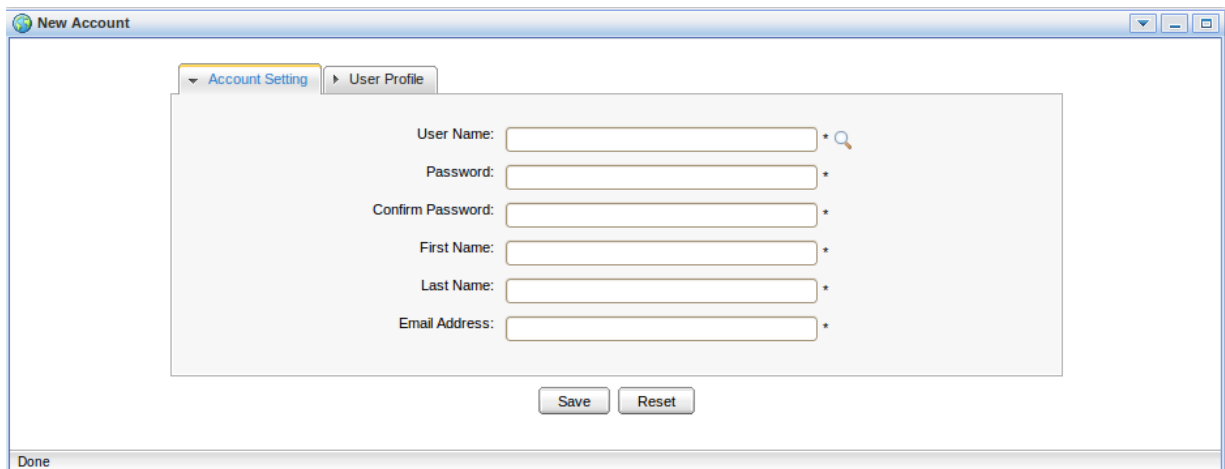
- User Name: (with a search icon)
- Password: *
- Confirm Password: *
- First Name: *
- Last Name: *
- Email Address: *
- Text validation: (with a watermark 'ewymg' and a star icon)

At the bottom are 'Subscribe' and 'Reset' buttons.

Illustration 2: Register Portlet

3.1.2 Account portlet

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



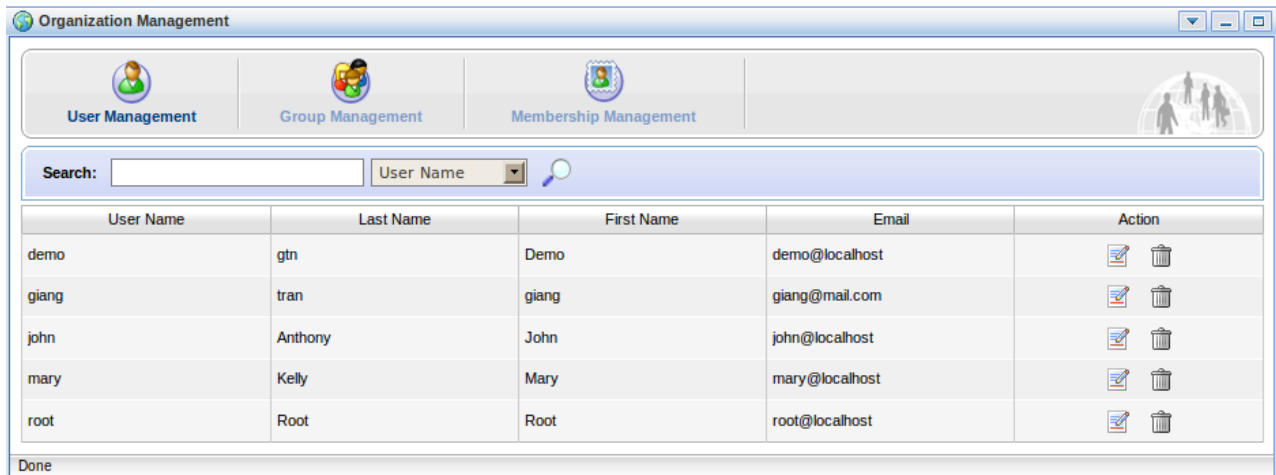
The 'New Account' window features two tabs: 'Account Setting' (selected) and 'User Profile'. The 'Account Setting' tab contains the same registration fields as the Register Portlet:

- User Name: *
- Password: *
- Confirm Password: *
- First Name: *
- Last Name: *
- Email Address: *

Below the fields are 'Save' and 'Reset' buttons. A 'Done' button is located at the bottom left of the window.

3.1.3 Organization portlet

This portlet is to manage user information, users groups and memberships.



3.1.4 Application registry portlet

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

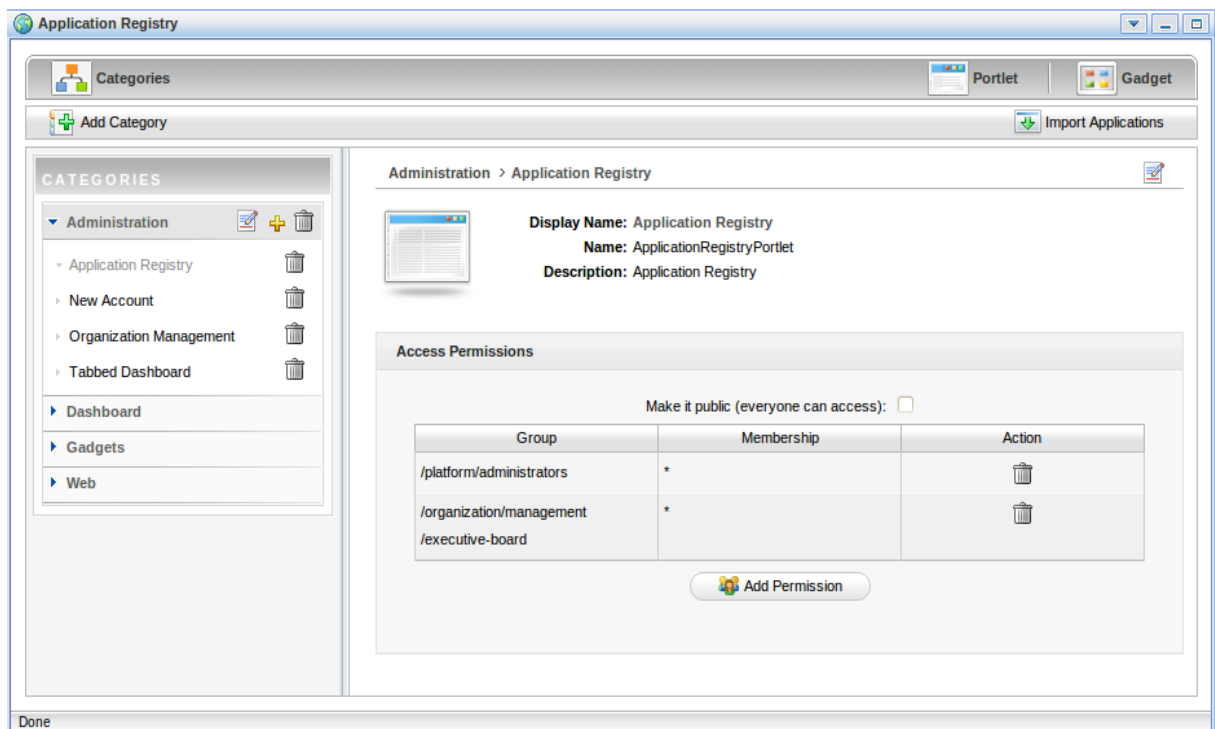
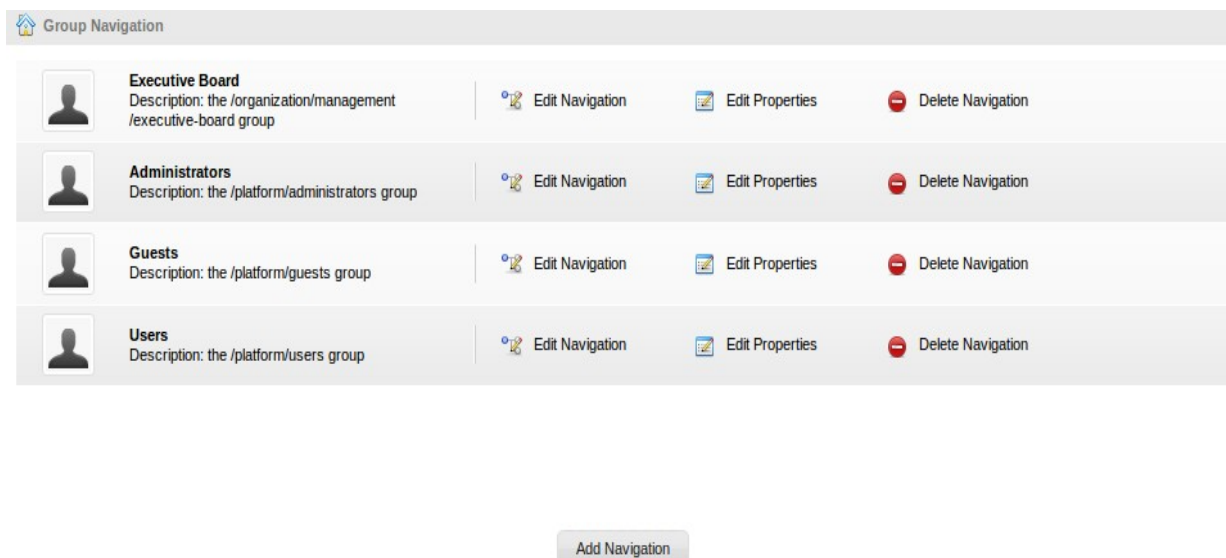


Illustration 3: The Application Registry Portlet

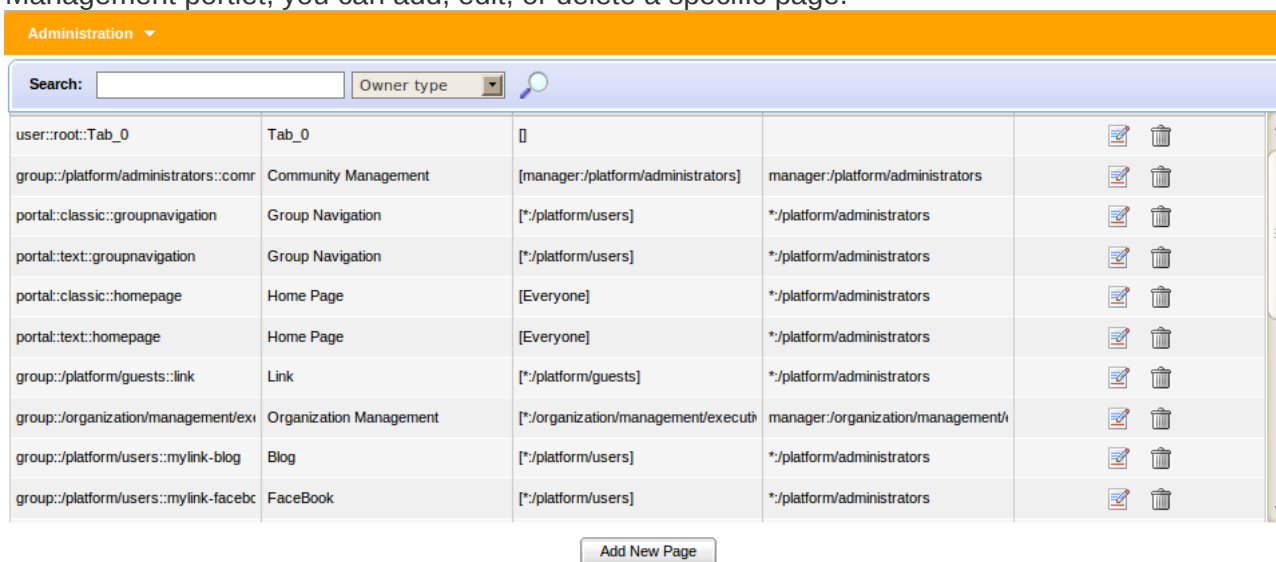
3.1.5 Group navigation portlet

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



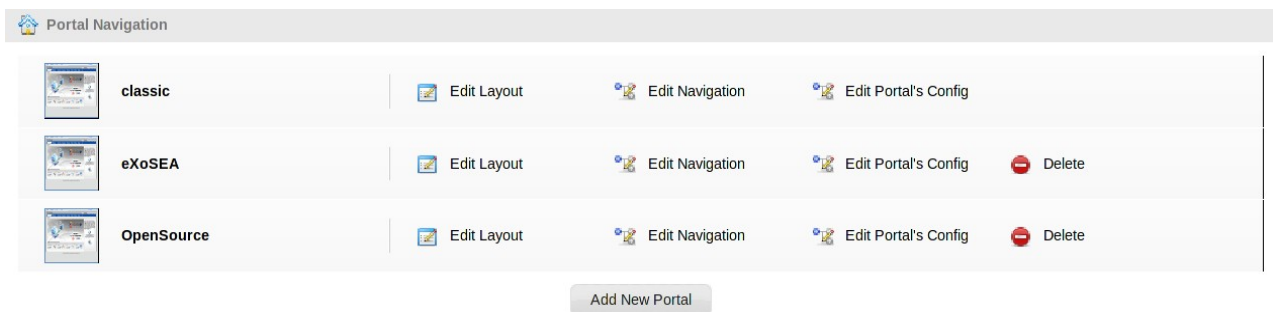
3.1.6 Page management portlet

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



3.1.7 Portal navigation portlet

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



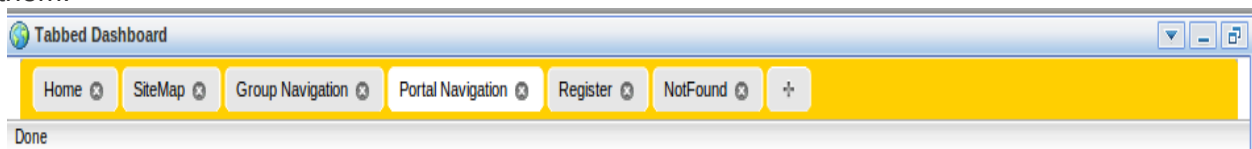
3.1.8 Star toolbar portlet

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



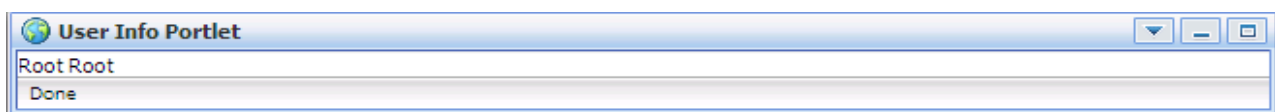
3.1.9 Tabbed dashboard

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



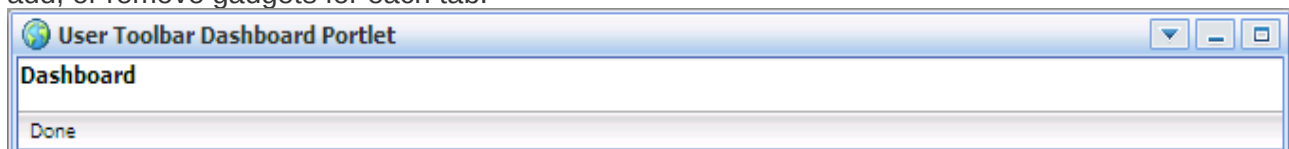
3.1.10 User info portlet

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



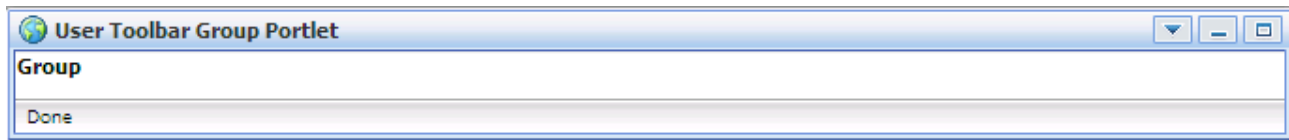
3.1.11 User toolbar dashboard portlet

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



3.1.12 User Toolbar Group portlet

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



3.2 Interface portlet

Interface portlets constitute the GateIn interface as front-end components of the portal.

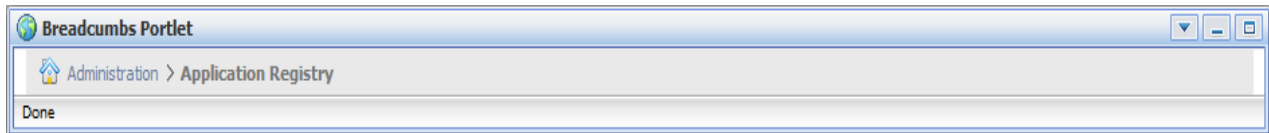
3.2.1 Banner portlet

The portlet contains slogan, logo and icon of an organization.



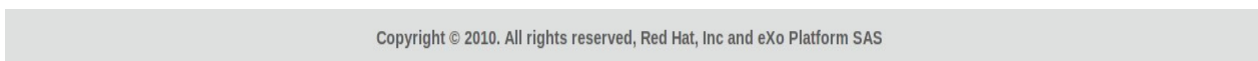
3.2.2 Breadcrumbs portlet

The portlet displays the navigation path of the selected page.



3.2.3 Footer portlet

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



3.2.4 HomePage portlet

The portlet is the homepage for a portal. The homepage is the first page displayed when you visit the portal.



Try GateIn 3.1 with one of these user accounts:

Administrator Username: root Password: gtn	Manager Username: john Password: gtn	User Username: mary Password: gtn	Demo Username: demo Password: gtn
---	---	--	--

GateIn is the new generation of Open Source portal, jointly led by Red Hat and eXo Platform who partner to gather the best portal experts and communities around a robust and intuitive portal that brings rich administration functionalities to IT systems.



For more information, please contact us.



3.2.5 IFrame portlet

The portlet is used to create IFrame elements for a site. The IFrame is an HTML element which can embed a different HTML document into a HTML document. So, the embedded document is displayed inside a sub-window of the browser window. This does not mean the full inclusion, the embedded document is independent and both documents are considered as separated documents.



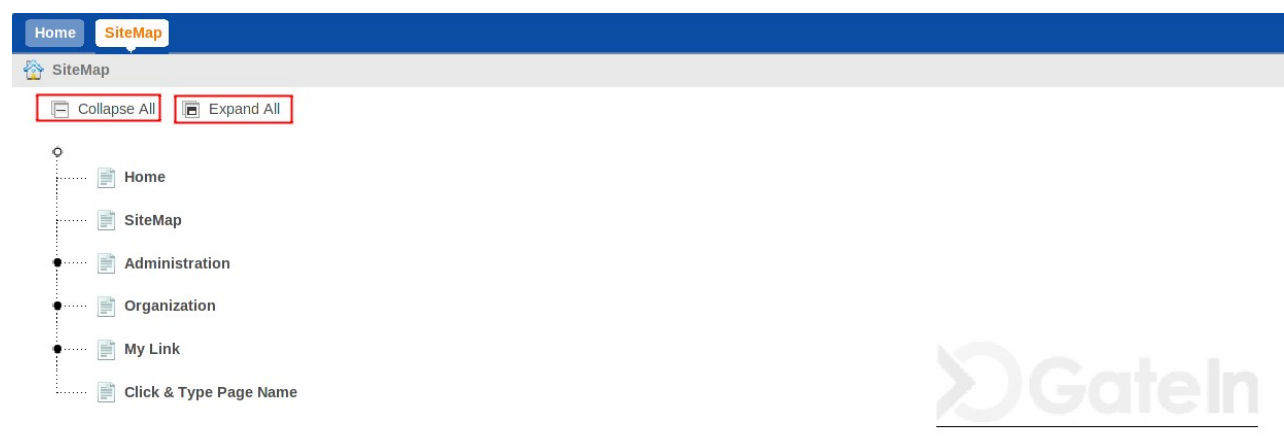
3.2.6 Navigation portlet

The portlet provides a navigation bar which looks like a menu to help users visualize the site structure and provide links to move among pages quickly:



3.2.7 SiteMap portlet

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



3.2.8 Web browser portlet

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



Illustration 4: The Browser Portlet interface

3.2.9 Dashboard portlet

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

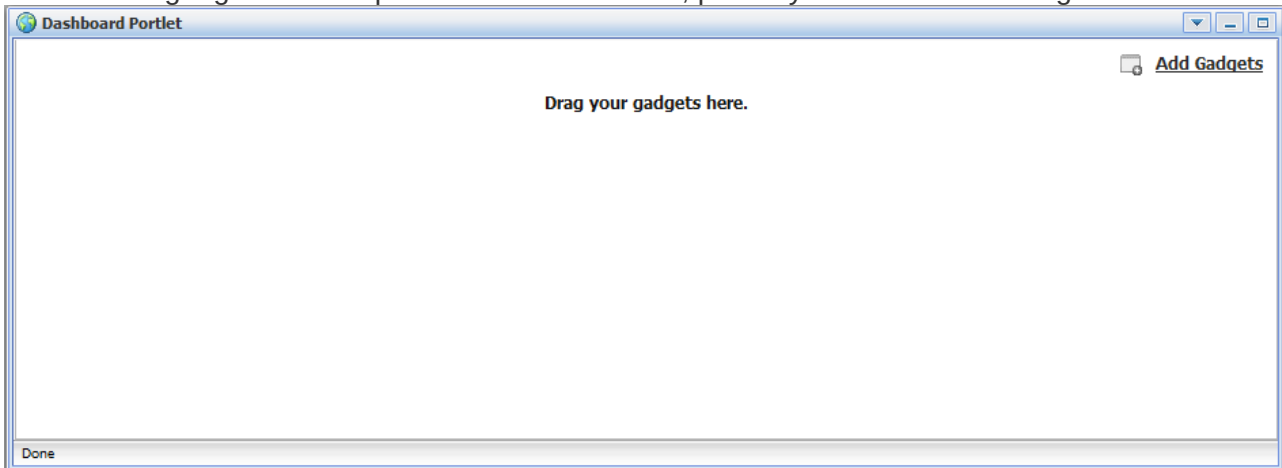


Illustration 5: The Dashboard portlet interface

3.2.10 Gadget wrapper portlet

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

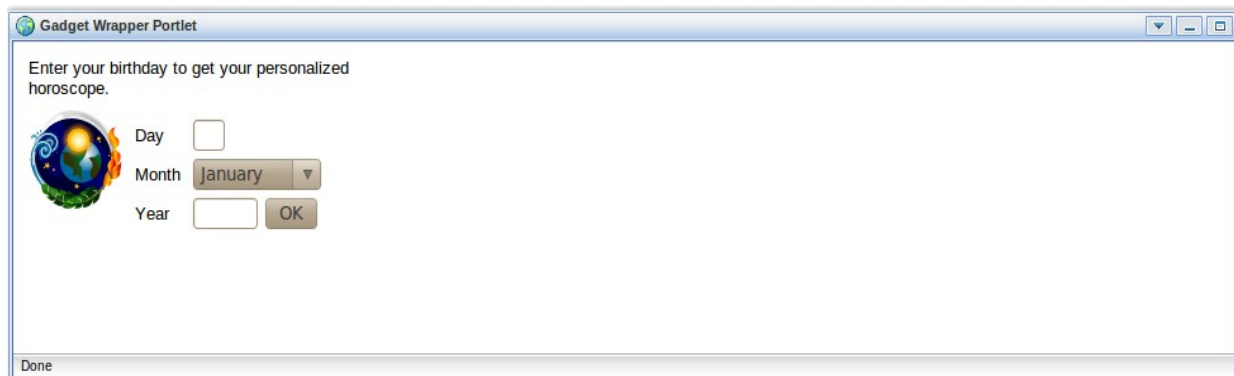


Illustration 6: Gadget Wrapper Portlet

3.3 Dashboard portlet

The dashboard portlet is to host mini-applications known as gadgets. The dashboard uses a variety of graphical effects for displaying, opening and using gadgets.

Gadgets within the Dashboard portlet may be moved, or rearranged. Users can create new gadgets and delete unnecessary ones. Also, users can open many gadgets with different settings at once.

3.3.1 Use the dashboard workspace

1. Click **Dashboard** on the administration bar.
2. Click **Add Gadgets** to open the **Dashboard Workspace**.

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

The followings are default gadgets:

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

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

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

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

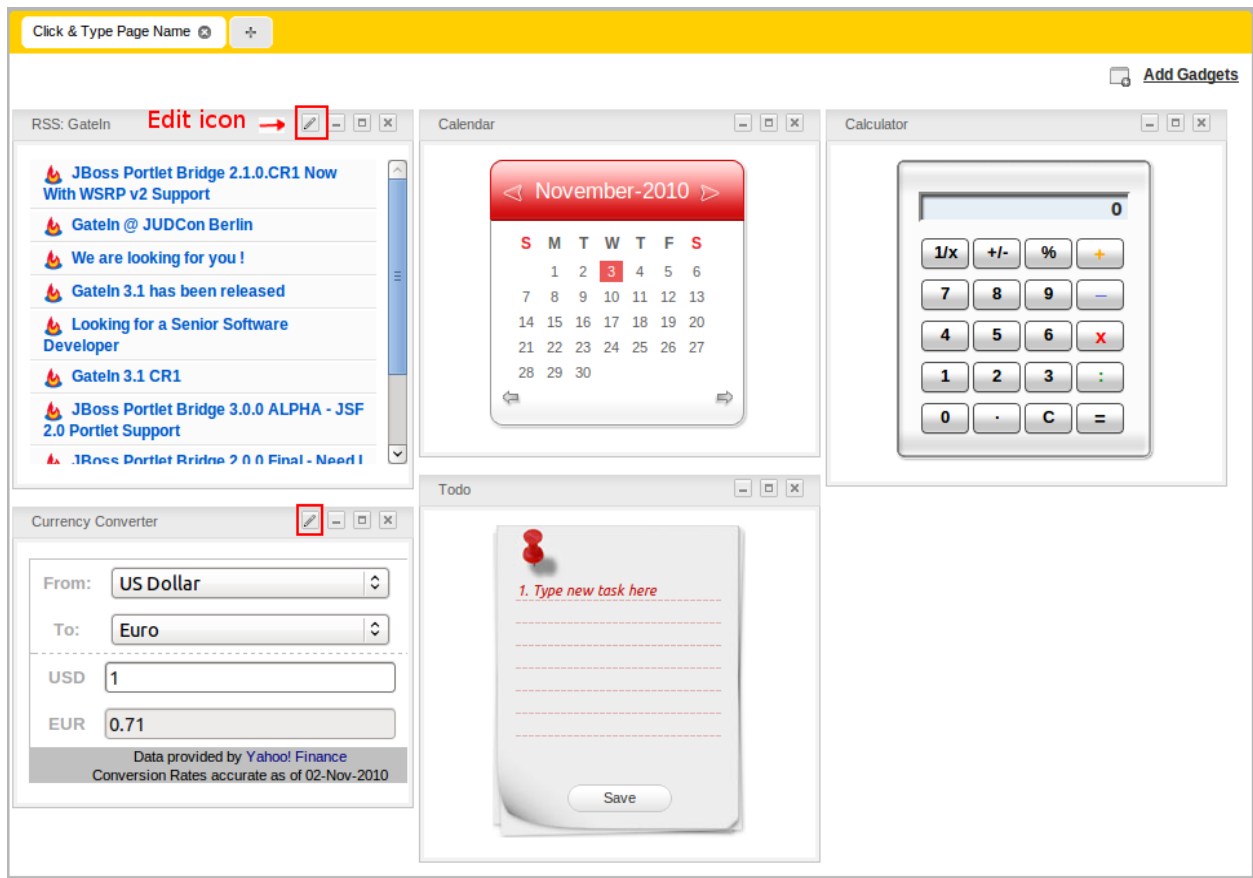
3. Select a gadget in the Dashboard Workspace.
4. Drag and drop the selected gadget into the Workspace.

In addition, GateIn 3.1 is compatible with most gadgets which can be found here.



3.3.2 Change gadget preferences

The edit icon on gadgets only displays when the gadget has some gadget preferences. This icon enables users to display the edit form and change preferences of gadget.



To change preferences of a gadget, for example RSS gadget, do as follows:

1. Click the edit icon to open the edit form of RSS gadget:

RSS: GateIn

FEED URL:

of Items (1-100):

Save Cancel

JBoss Portlet Bridge 2.1.0.CR1 Now With WSRP v2 Support

GateIn @ JUDCon Berlin

We are looking for you !

Number of items

2. Enter your preferred RSS into the **FEED URL** field and one numeric character (from 1 to 100) in the **Items** field. The numeric character you entered is the number of items displayed in the RSS gadget.

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

3.3.3 Add more gadgets from Dashboard

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

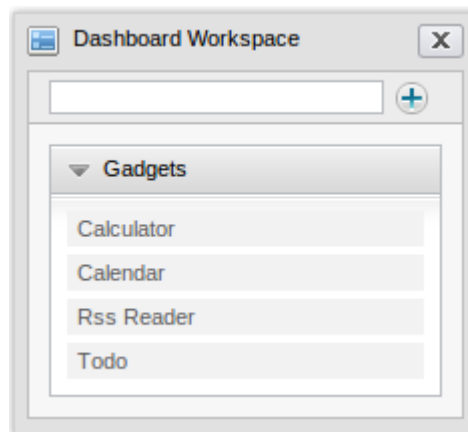
1. Open the URL (.xml or .rss) of your desired gadget.


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

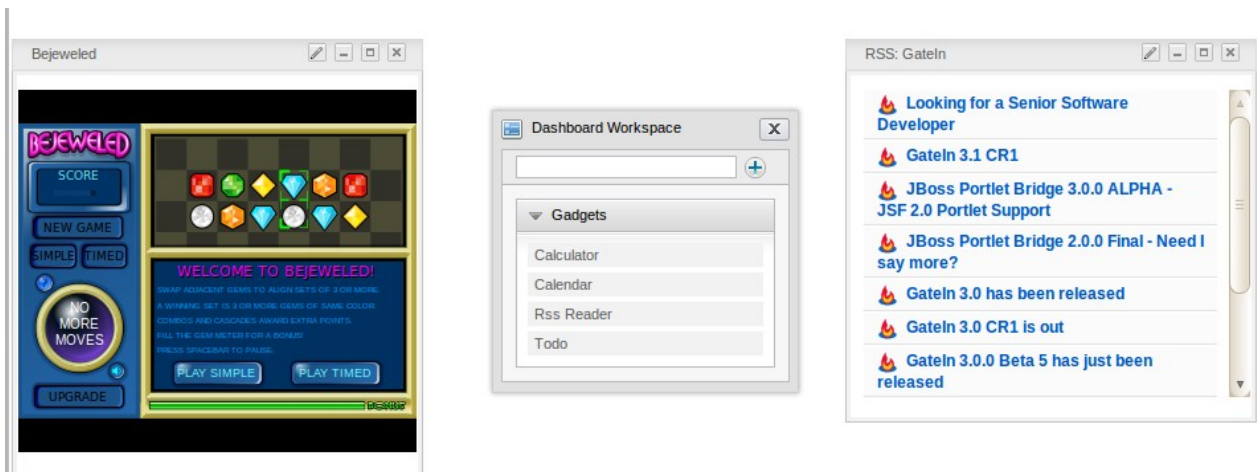
2. Return to your portal, and click **Dashboard** on the administration bar.

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

The **Dashboard Workspace** will appear:



4. Paste the URL achieved in Step 1 into the textbox next to the icon  .
5. Click the plus icon to add the new gadget to the page.



4 Gateln Administration



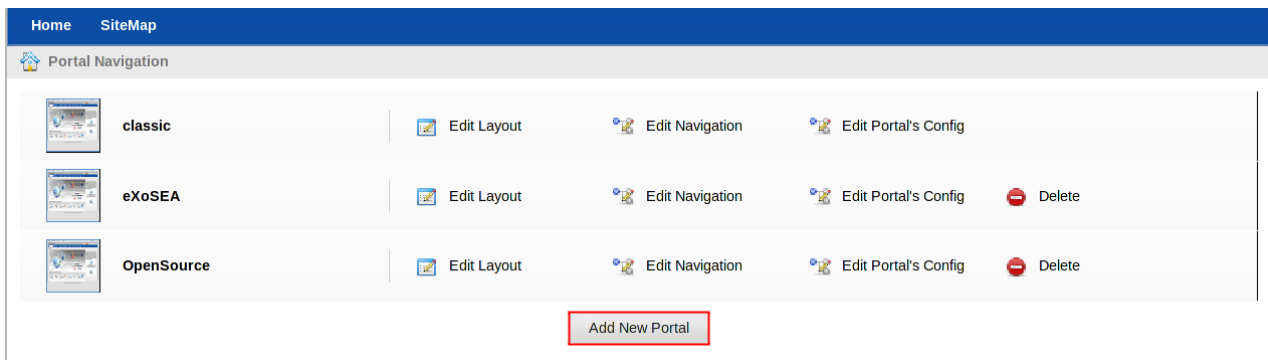
The functions stated in this section are advanced and for administrators only.

4.1 Manage portals

4.1.1 Create a new portal

You can perform this action only when you are a member of the group **/platform/administrators**.

1. Click **Site** on the Administration bar to visit the **Portal Navigation** page.
The Portal Navigation page will be displayed.



2. Click  .

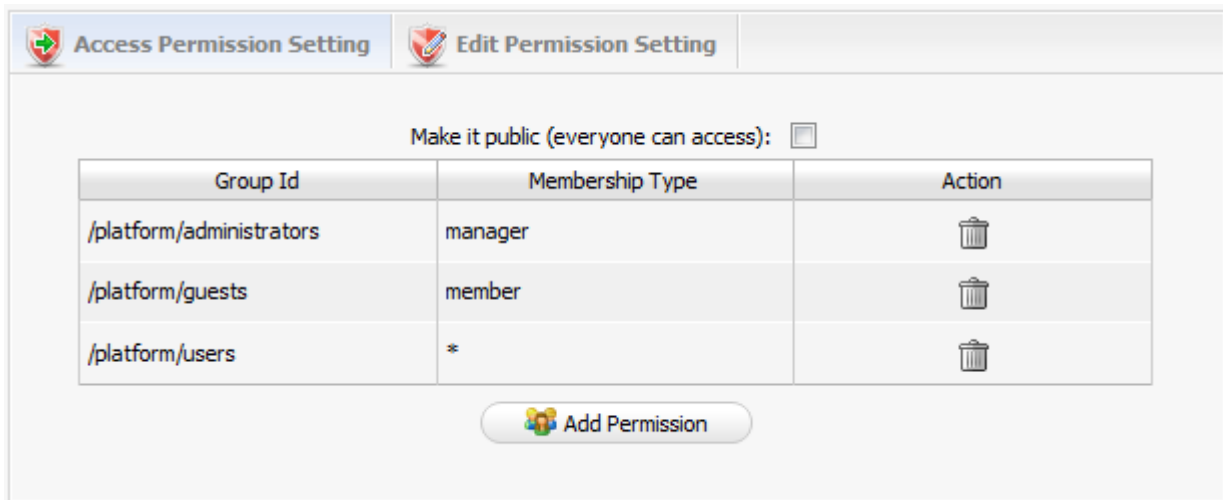
By default, the **Create New Portal** window which contains the **Portal Setting** tab will open:

The screenshot shows a dialog box titled 'Portal Setting' with three tabs: 'Portal Setting' (selected), 'Properties', and 'Permission Setting'. The 'Portal Setting' tab contains three fields: 'Portal Name' with the value 'EnglishClubs', 'Locale' with the value 'English', and 'Skin' with the value 'Default'. Each field has a small asterisk to its right. At the bottom of the dialog are 'Save' and 'Cancel' buttons.

3. Enter a value into the **Portal Name** field which is required and must be unique. ONLY alphanumeric and underscore characters are allowed for this field and the name must have at least **THREE** characters and less than **THIRTY** characters.
4. Select the default display language for the portal in the **Locale** list.
5. Select a skin for the portal by selecting one type. Currently, there are two skin types available, including Default and SimpleSkin.
6. Click the **Properties** tab to select values in the field **Keep session alive**, including **THREE** options:
 - **Never:** The session will never time out, even if an application requests it.
 - **On-demand:** The session will time out if an application requests it.
 - **Always:** The session will time out after a set period.
7. Click the **Permission Setting** tab and set the permissions for the portal.
 - By default, the access permissions list for portal is empty. You have to select at least one or check **Make it public** to set access permission to everyone.
 - Edit permission is also empty and you have to select one.
8. Click **Save** to accept creating the new portal, or **Cancel** to quit.

4.1.2 Access a portal

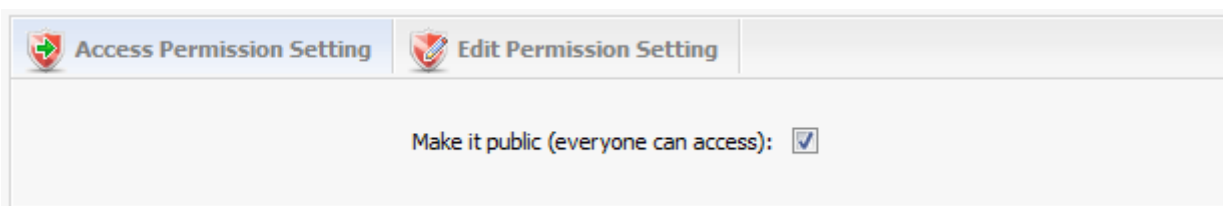
If you want to access a portal, you must be in the Access Permissions list of that portal.
For example: a portal's Access Permission list:



Make it public (everyone can access): ☐

Group Id	Membership Type	Action
/platform/administrators	manager	
/platform/guests	member	
/platform/users	*	

To access this portal, you must be a “manager” of group /platform/administrators or a “member” of /platform/guests or a user in /platform/user with any membership type. To add more access rights, click **Add Permission** and then select the desired group and membership type. There is a flexible option for you to choose if you want everyone to access the portal by just selecting **Make it public**. In this case, the detailed access permission list disappears:



Make it public (everyone can access): ☒

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

4.1.3 Edit a portal

The function is to change information of the current portal, such as properties, or layouts. To do this, you must have the edit permission. Please contact your administrator to get more permissions. When you have the edit permission, follow one of two ways below to edit the current portal:

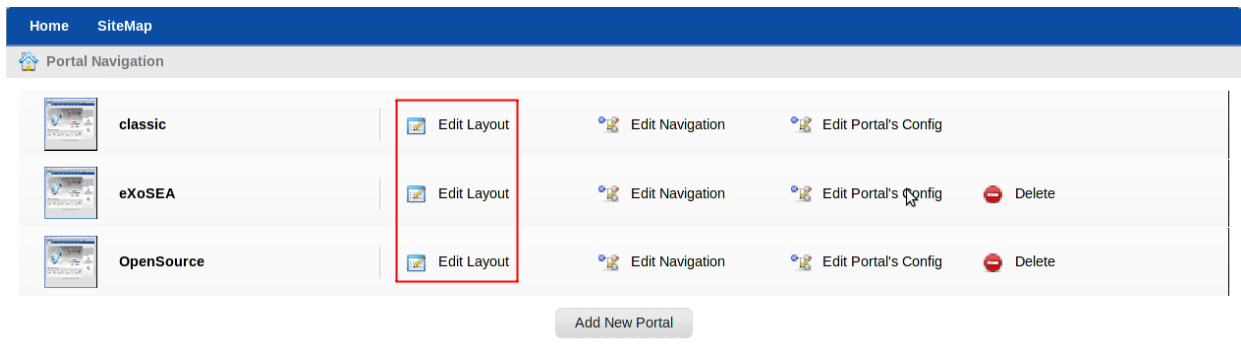
The 1st way:

1. Hover your cursor over **Site** on the administration bar and select the portal you want to edit from the drop-down menu.
2. Select **Site Editor** → **Edit Layout** on the administration bar.

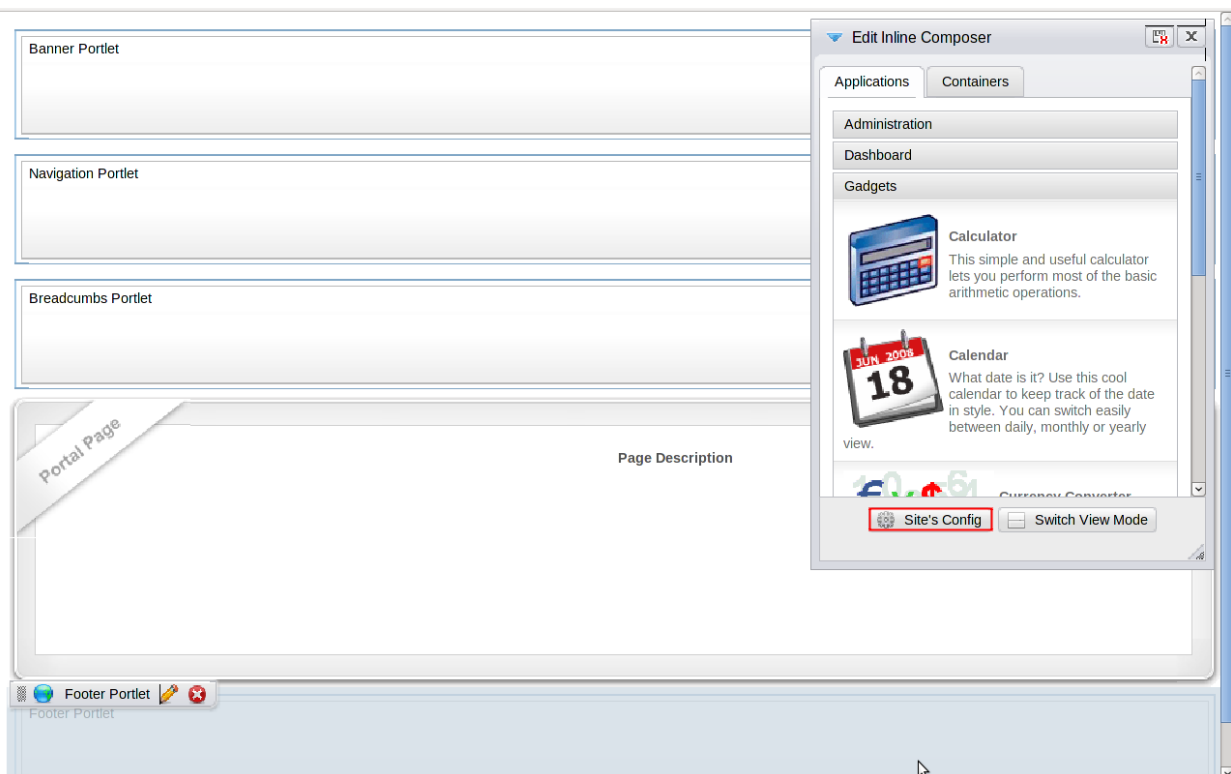
The 2nd way:

1. Click **Site** on the administration bar, then select **Edit Layout** corresponding to the

portal that you want to edit.



The **Edit Inline Composer** will be displayed:




2. Click  **Site's Config** to edit portal properties.
The form to edit the portal properties will appear:

Illustration 7: The Portal Setting tab of the portal properties form

3. Change the properties of the current portal settings, properties or modify permissions:
For example: a portal's Edit Permission looks like:

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

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


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

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

5. Click  to edit the portlet in the portal, or  to remove the existing portlet.

6. Add other portlets by selecting, dragging and dropping from the **Applications** tab of the

Edit Inline Composer form to the main pane.

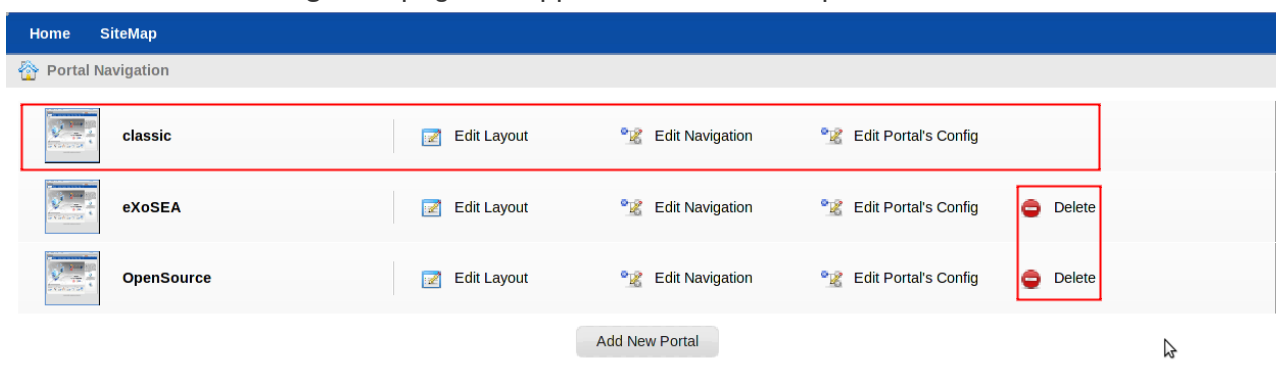
7. Click the Finish icon  to save changes.

4.1.4 Delete a portal

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

1. Click **Site** on the administration bar.

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



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

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

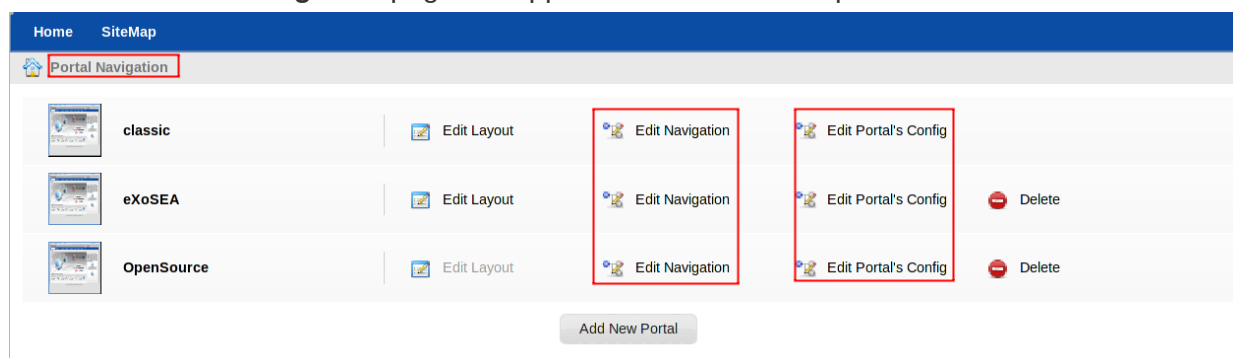


The default portals cannot be deleted by any user, including the administrator.

4.1.5 Edit navigation & configuration of portal

To edit navigation and configuration of portals, you first need to go to the Portal Navigation page by clicking **Site** on the administration bar.

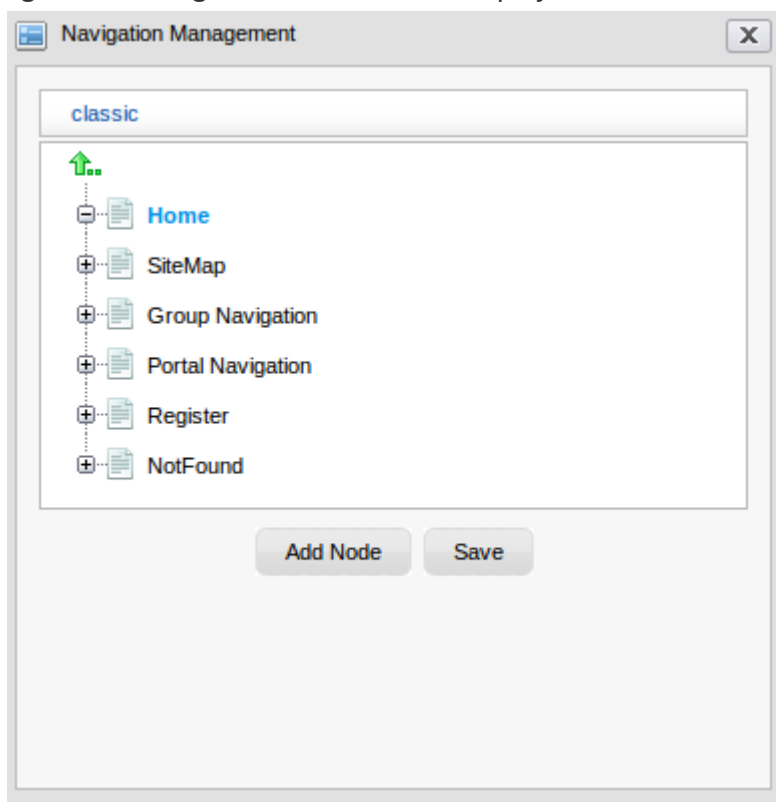
The **Portal Navigation** page will appear with the list of all portals:



Edit navigation:

1. Click **Edit Navigation** corresponding to the portal you want to edit.

The **Navigation Management** form will be displayed:

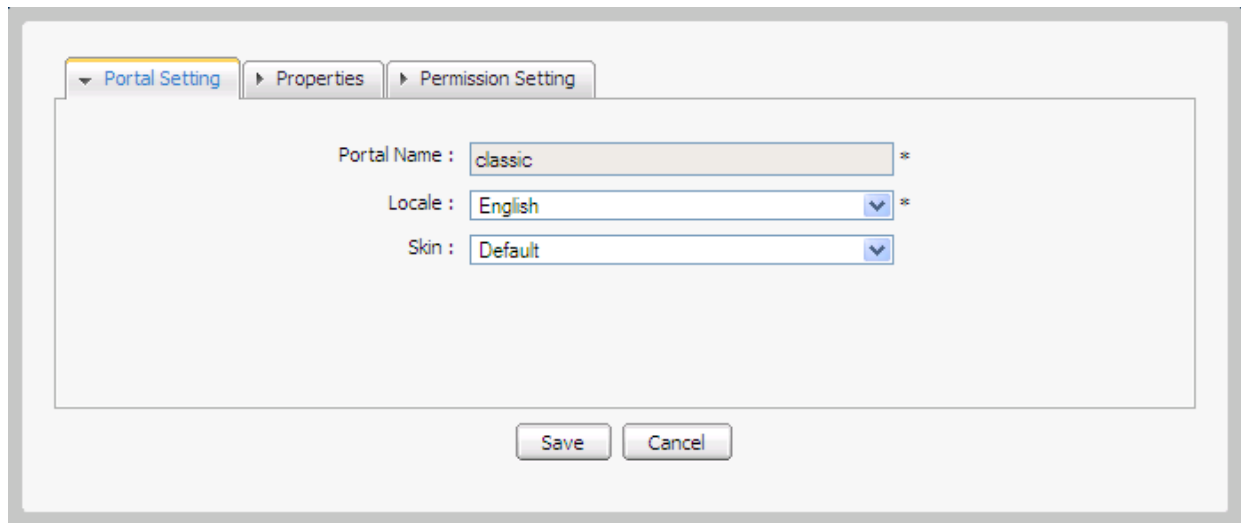


3. Select the navigation that you want to edit.
4. Click **Add Node** to add or change the node for a specific navigation. For more details about adding or editing nodes, refer to Section 4.2.1, Add a new node.
5. Click **Save** to accept changes.

Edit configuration:

This function enables you to change language, skin, properties and to set permissions as follows:

1. Click **Edit Portal's Config** corresponding to the portal you want to edit.
The form used to edit portal's properties will be displayed below.



The screenshot shows a dialog box titled 'Portal Setting' with three tabs: 'Portal Setting' (selected), 'Properties', and 'Permission Setting'. The 'Portal Setting' tab contains three fields: 'Portal Name' with the value 'classic', 'Locale' with the value 'English', and 'Skin' with the value 'Default'. Each field has a small asterisk to its right. At the bottom of the dialog are 'Save' and 'Cancel' buttons.

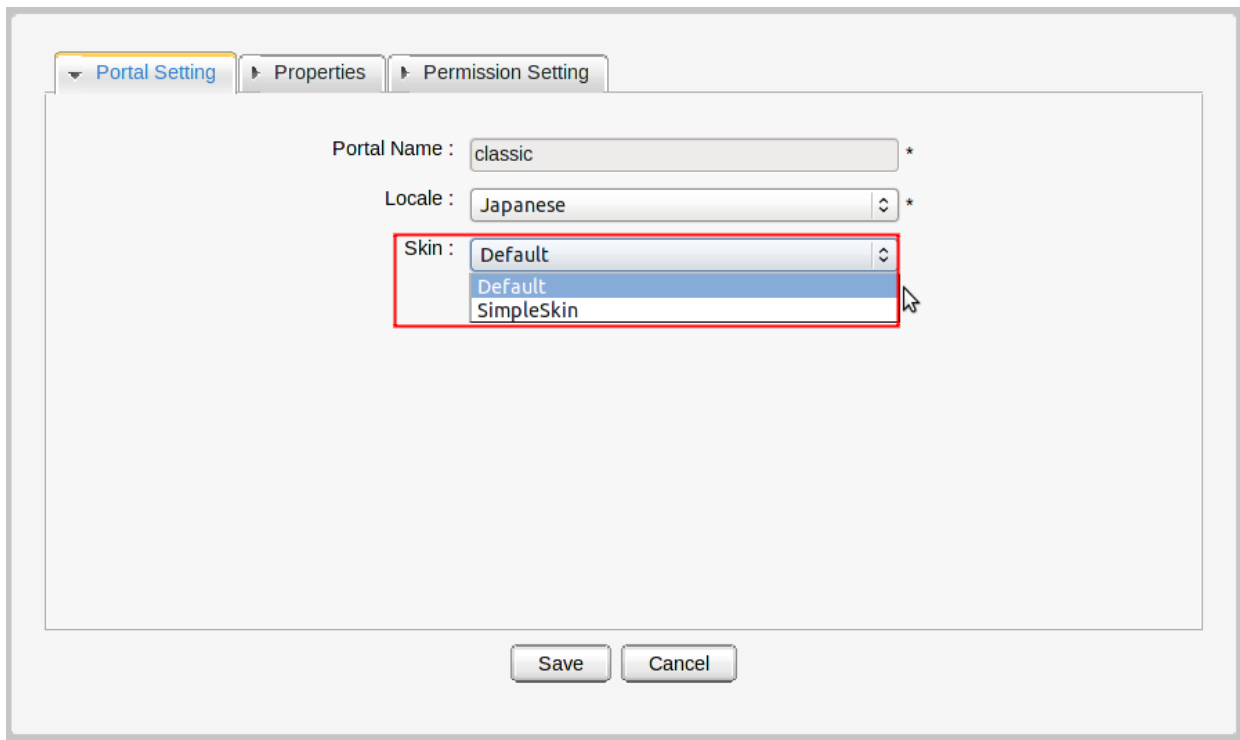
3. Make changes in **THREE** tabs, including Portal Setting, Properties and Permission Setting.
4. Click **Save** to accept your changes, or **Cancel** to discard without saving any changes.

4.1.6 Change portal skin

GateIn skins are graphic styles that enables user interfaces to be displayed in such an attractive way. Each skin has its own characteristics with different backgrounds, icons, and other visual elements, and more. With the aim of making portals become friendly and flexible in use, you are allowed to change skin without the right to edit the portal. The skins can be changed permanently or temporarily.

4.1.6.1 Change the skin permanently

1. Open the form to edit **Site's Config** by following steps described in Section 4.1.3, Edit a portal.



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

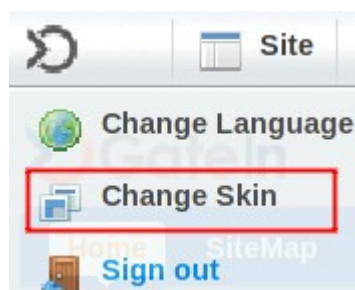
3. Click **Save** and select  to take affect.



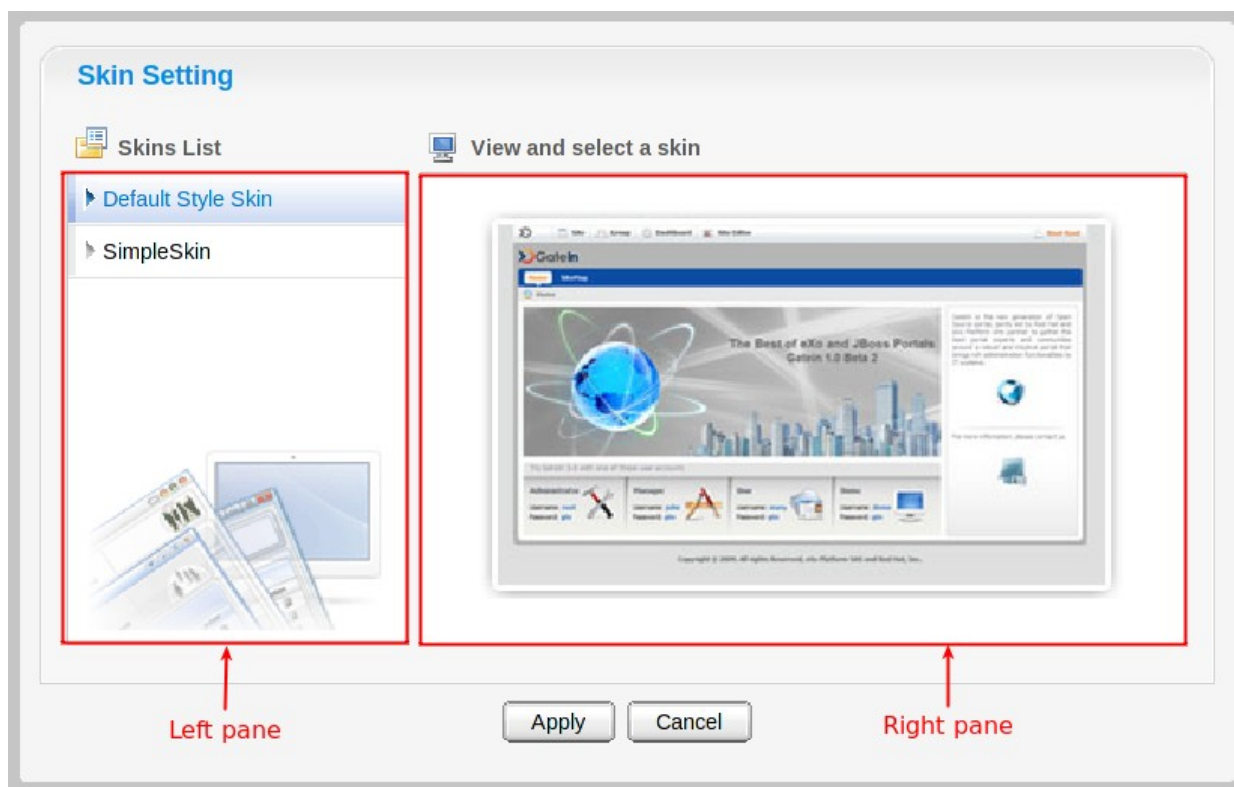
The display skin which is changed in this way will be kept permanently until you change the skin when you edit the current portal again.

4.1.6.2 Change the skin temporarily

1. Hover your cursor over the **Star** portlet on the administration bar and click **Change Skin** in the drop-down menu.



The **Skin Setting** form will be displayed with a list of all supported skins. The left pane contains the skins list and the right pane displays the template of selected skin.



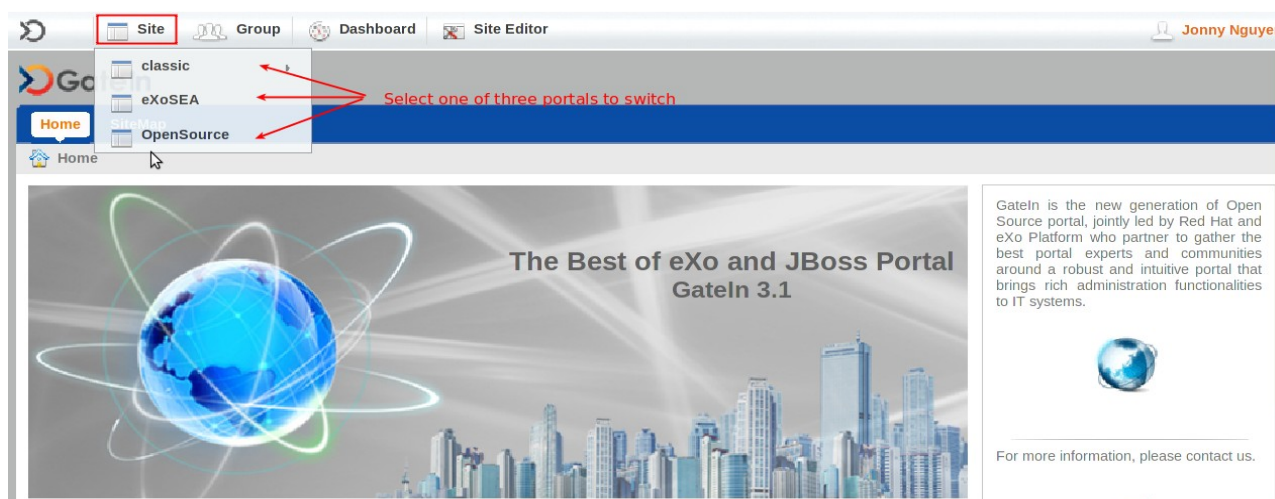
2. Select one skin by clicking the skin type in the left pane. Currently, GateIn 3.1 supports two skin types only, including **Default** and **SimpleSkin**.
3. Click **Apply** to take effect.



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

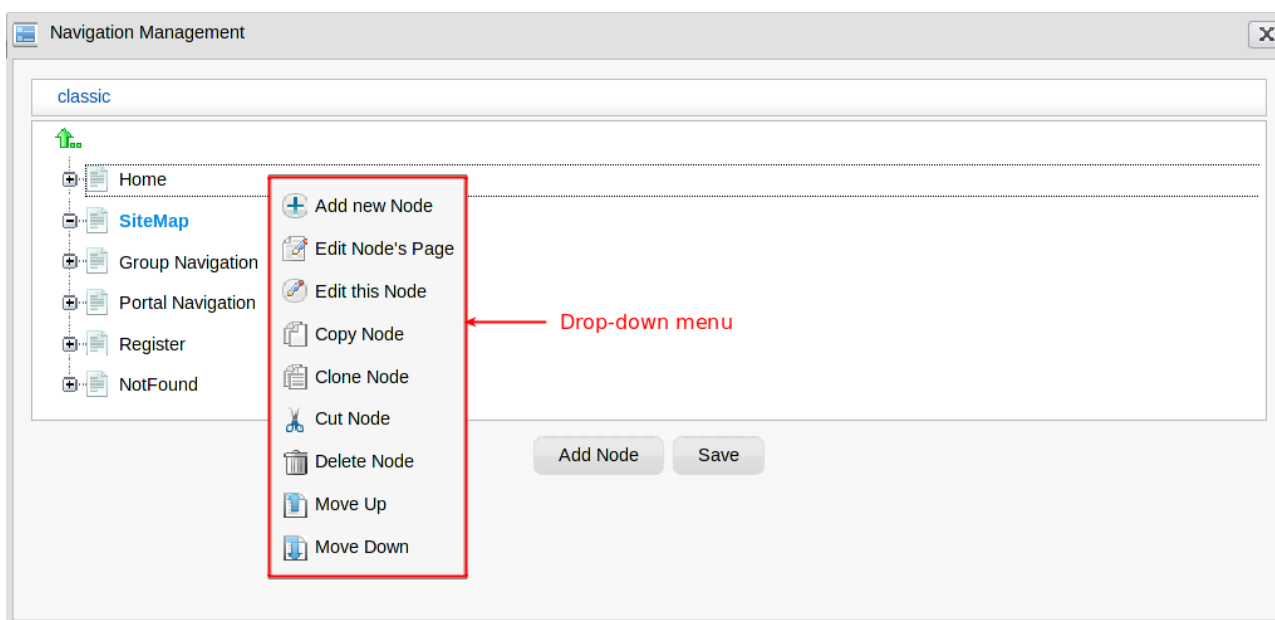
4.1.7 Switch between portals

This function enables you to select and use another portals (gateway, starting site). You can perform this action only when you are assigned the appropriate permission by the administrators. To switch between portals, simply hover your cursor over **Site** on the administration bar and click the portal name you want to switch in the drop-down menu.




4.2 Manage nodes

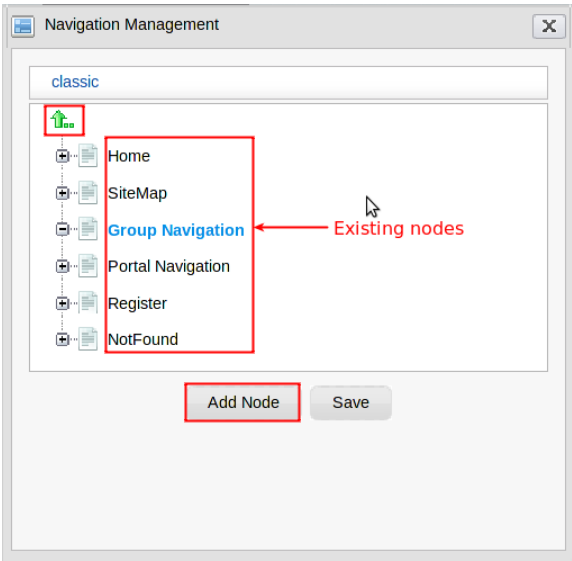
If you are the portal administrator or the portal administrator has granted you the appropriate permission privileges, you can execute some special actions related to portal nodes, including copying, editing, cutting, cloning, deleting, adding existing nodes. To do so, you first need to go to the nodes list by following steps described in **Section 4.1.5, Edit navigation & configuration of portal** and then right-click your desired node to see the drop-down menu.



4.2.1 Add a new node

1. Select **Add new Node** to create a node as a sub-node of the selected node. If you want to create a new node at the root level of the portal, click the arrow up icon  and then right-click the empty space and select **Add new Node**, or simply click the **Add Node**

button.



The **Add/Edit Page Node** form will appear:

Illustration 8: The Page Node Setting tab of the Add/Edit Page Node form

Details:

The **Page Node Setting** tab includes:

- Uri:** The node identification which will be automatically created once a new node has been created.
- Node Name:** The node name which must be unique. Only alphabetic, numeric and underscore characters are allowed with the length from **THREE** to **THIRTY** characters.
- Label:** The display name of node on the screen. This field may be changed and its length must be between **THREE** and **ONE HUNDRED TWENTY** characters.
- Visible:** This checkbox enables the page and its node to be shown or hidden at the navigation bar and sitemap.
- Publication date & time:** This option enables this node to be published for a given period. Two fields,

including '**Start Publication Date**' and '**End Publication Date**' only display when this option is checked.

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

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

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

Illustration 9: The Page Selector tab of the Add Page Node form

Details:

Page Id: The identification string of the page.

Name: The selected page's name.

Title: The selected page's title.

Clear Page: This button is to remove the inputted page information from fields.

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




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

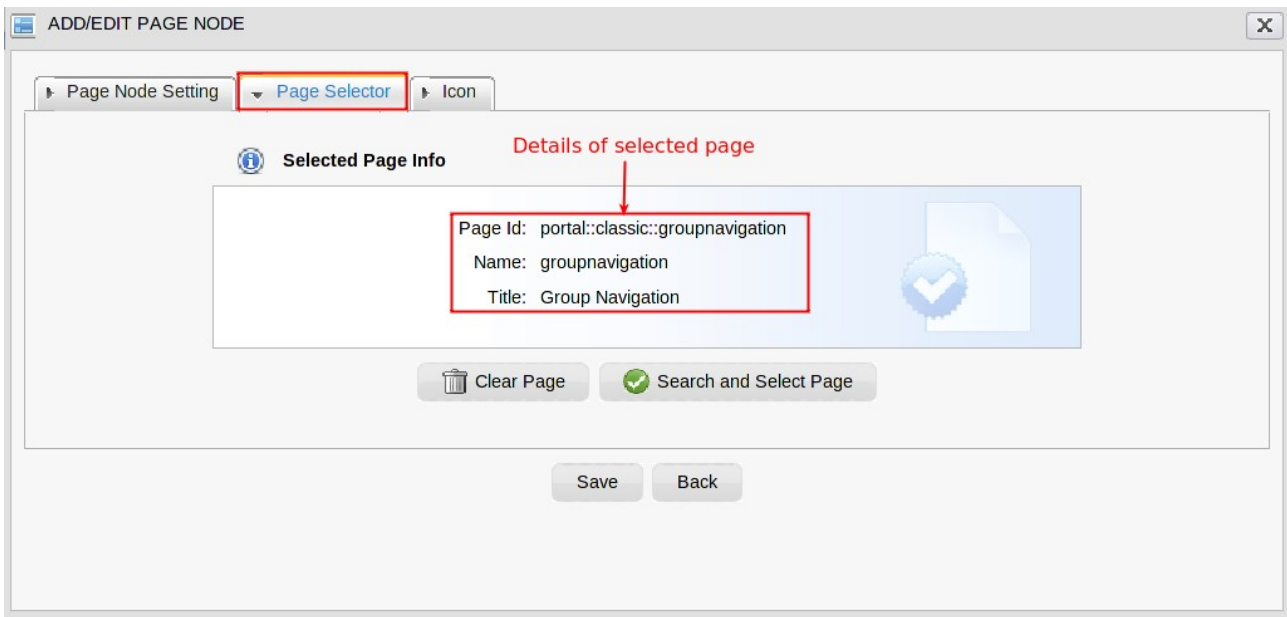
You do not need to input values in these fields. They are automatically displayed after you have selected an exiting page by clicking **Search and Select Page**.

The **Select a page** form appears:

Page Id	Title	Access Permission	Edit Permission	Action
user::root::Tab_0	Tab_0			✓
group::/platform/administrators::c	Community Management	[manager:/platform/administrator	manager:/platform/administrators	✓
portal::OpenSource::groupnaviga	Group Navigation	[*/platform/users]	*/platform/administrators	✓
portal::eXoSEA::groupnavigation	Group Navigation	[*/platform/users]	*/platform/administrators	✓
portal::classic::groupnavigation	Group Navigation	[*/platform/users]	*/platform/administrators	✓
portal::OpenSource::homepage	Home Page	[Everyone]	*/platform/administrators	✓
portal::eXoSEA::homepage	Home Page	[Everyone]	*/platform/administrators	✓
portal::classic::homepage	Home Page	[Everyone]	*/platform/administrators	✓
group::/platform/guests::link	Link	[*/platform/guests]	*/platform/administrators	✓
group::/organization/management	Organization Management	[*/organization/management/lex	manager:/organization/management	✓

To select a page for creating a node, do as follows:

1. Select a page by left-clicking  in the **Action** column; or enter a search term related to the page you want to search.
2. Select one criterion you wish to search in.
3. Click  to performing your search. All pages matching with the search term will be listed.
4. Click  on the row of the desired page to select the page on the list of found pages. After selecting a page, the details of this page will be displayed in the **Page Selector** form.



The screenshot shows the 'ADD/EDIT PAGE NODE' window with the 'Page Selector' tab selected. Under 'Selected Page Info', the following details are listed: Page Id: portal::classic::groupnavigation, Name: groupnavigation, and Title: Group Navigation. A red box highlights these details, and a red arrow points to it with the text 'Details of selected page'. Below the details are buttons: 'Clear Page' and 'Search and Select Page'. At the bottom of the window are 'Save' and 'Back' buttons.



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

5. Select one icon in the **Icon** tab.
6. Click **Save** to accept the new node page, or **X** to close the form.

4.2.2 Edit a node

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

1. Select **Edit this Node** to open the form to edit the selected node with all similar fields when you add a new node.
2. Change values in fields of the current node, except the node name.
3. Click **Save** to complete changing, or **X** to quit.

4.2.3 Copy/Paste a node

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

1. Select **Copy Node**.
2. Select the position you want to paste this node and select **Paste Node**.
The node selected at step 1 will be reproduced in the new place.
3. Click **Save** to make changes.



3. Two same node names in the same place are not allowed.

4.2.4 Clone a node

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

1. Select **Clone Node** in the drop-down menu.
2. Select the position you want to paste this node and select **Paste Node**.
The node cloned at step 3 will be reproduced in a new place.
3. Click **Save** to make changes.

4.2.5 Cut a node

This function enables you to change the position on a specific node, such as changing the page path.

1. Select **Cut Node**.
2. Select the position you want to paste this node and select **Paste Node**.
The node cut at step 3 will be moved to the new position.
3. Click **Save** to make change.
The node at step 3 is moved to a new place.



1. Two same node names are not allowed in the same path (node).

4.2.6 Delete a node

The function is used to remove a node linking to a page; however, the page has been still existing.

1. Select **Delete Node**. One confirmation message will be displayed.
2. Click the **Ok** to accept the deletion or **Cancel** to discard.
3. Click the **Save** to make your change.



You, even as an administrator, cannot cut or delete **FOUR** system navigations, including **Group Navigation**, **Portal Navigation**, **Register** and **NotFound**. Also, you cannot cut or delete these system nodes which have been copied or cloned in the new positions. However, you can cut or delete them through cutting or deleting the node containing them, except system nodes.

4.2.7 Change nodes order

This function is used to move a node up or down.

1. Select **Move Up** or **Move Down** in the drop-down menu.
The selected node will be moved up/down.
2. Click **Save** to make your change.

4.3 Manage pages

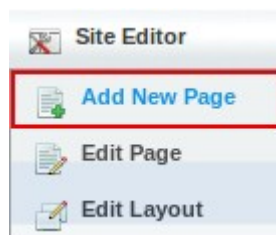
4.3.1 Create a new page with Site Editor

A page creation wizard is available to the portal's administrators and facilitates them to create and publish portal pages quickly and easily. The whole process to create a new page can be divided into **THREE** specific steps:

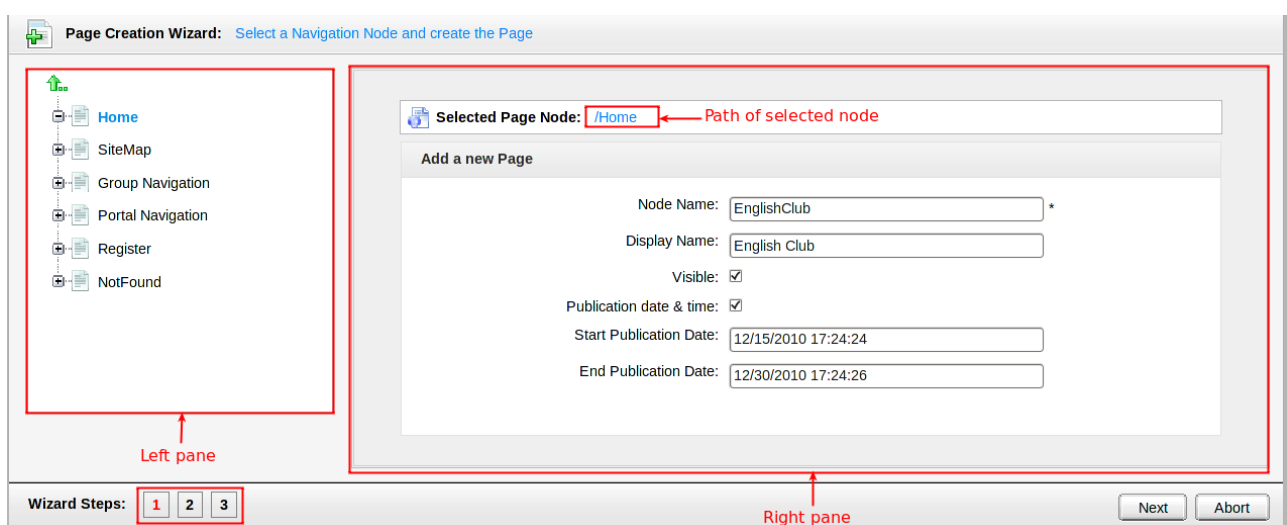
4.3.1.1 Select a Navigation Node and create the Page

In this first step, you have to set the Node Name and Display Name of your page. You are also able to decide the pages visibility and how long the page is published.

Go to  **Site Editor** on the Administration bar and select **Add New Page**.



The wizard will be displayed as below:



The **Page Creation Wizard** is divided into two panes:

- The left pane contains existing pages (navigation nodes) displayed in the tree

hierarchy. You can change the selected page node displayed in the right pane by clicking another page node in the left pane.

- The right pane displays the **Page Editor**, where you can make changes to the selected navigation node. You can input parameters for your new page, including:

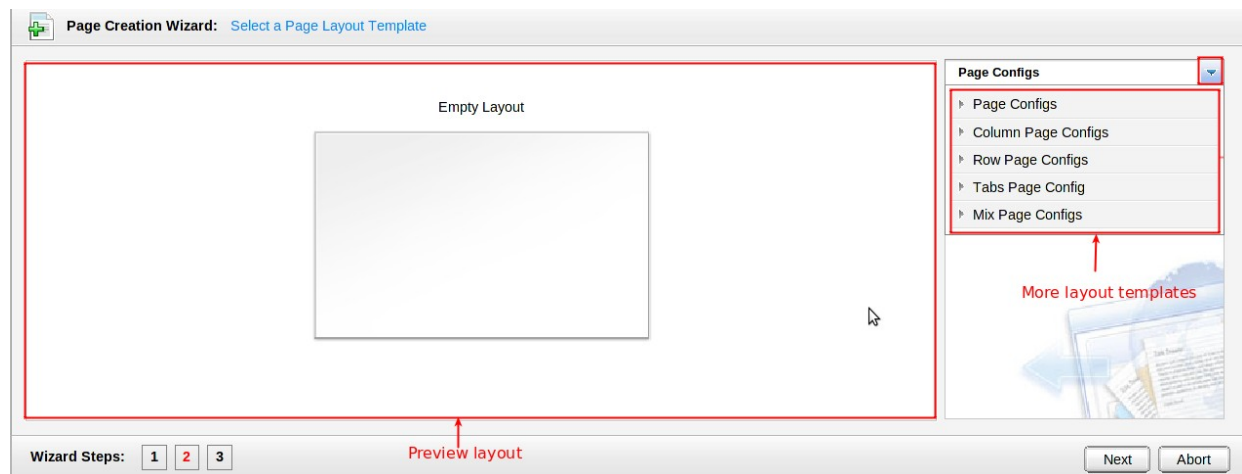
Selected Page Node:	The path of the selected node to add a new sub-page.
Node name:	The node name of the added page. This field is required with the length between THREE and THIRTY characters.
Display name:	The display name of the node which contains the added page and must have length between THREE and ONE HUNDRED TWENTY characters.
Visible:	This checkbox enables this page (node) to be shown on the Navigation bar, Page Navigation and Sitemap or not. By default, the checkbox is checked and it means that this page is shown in Navigation , Page Navigation and Sitemap . When this option is checked, the visibility will depend on the "publication date and time" option.
Publication date & time:	This option enables the page to be published for the given period. If this option is checked, two fields, including Start Publication Date and End Publication Date , will be shown.
Start Publication Date:	The start date and time to publish the page.
End Publication Date:	The end date and time to publish the page.



You can set date and time by clicking **Start Publication Date** and **End Publication Date** and then selecting a date in the calendar pop-up.

When you finish, click **Next** to go to the next step: Select a Page Layout Template

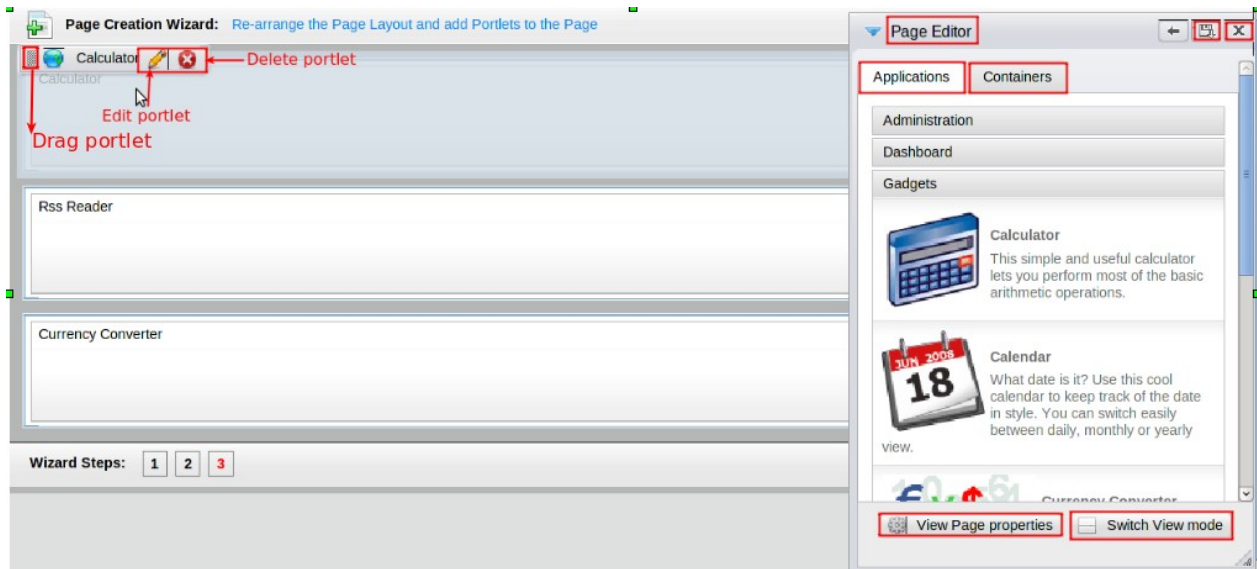
4.3.1.2 Select a page layout template



Select a page template, and then click **Next** to go to the last step .



4.3.1.3 Re-arrange page layout and portlets

In this step, you will use **Page Editor** to add available Portlets and Containers to your page or to view page properties or preview changes.



- The **Applications** tab lists all categories and their portlets that you easily can drag and drop in your page area:



- The **Containers** tab contains all the existing containers to build your page layout. You can add a container to your page area by dragging and dropping available containers from **Page Editor** into the page's area.
- Click **Switch View mode** in **Page Editor** to preview all changes.
- Click  in the **Page Editor** to save all the changes, or  in **Page Editor** to abort.



After hovering your cursor over each area of portlet and/or container to display the toolbar on the left top corner, you can change the position of portlet and/or container by using the drag-and-drop function, or can edit or delete the selected portlet by selecting the corresponding icons.

4.3.2 Create a new page using Page Management

- Go to **Group** on the administration bar and select **Administration** → **Page**

Management.

The **Page Management** form will appear:

The screenshot shows the 'Page Management' form in the GateIn Administration interface. The form has a search bar and a dropdown menu for 'Owner type'. Below these is a table listing existing pages. The table has five columns: 'Page Id', 'Title', 'Access Permission', 'Edit Permission', and 'Action'. The 'Action' column contains icons for editing and deleting pages. At the bottom of the table, there is a red box containing the text 'Add New Page'.

Page Id	Title	Access Permission	Edit Permission	Action
user::root::Tab_0	Tab_0	[]		
group::platform/administrators::community	Community Management	[manager:/platform/administrators]	manager:/platform/administrators	
portal::OpenSource::groupnavigation	Group Navigation	[*/platform/users]	*/platform/administrators	
portal::eXoSEA::groupnavigation	Group Navigation	[*/platform/users]	*/platform/administrators	
portal::classic::groupnavigation	Group Navigation	[*/platform/users]	*/platform/administrators	
portal::OpenSource::homepage	Home Page	[Everyone]	*/platform/administrators	
portal::eXoSEA::homepage	Home Page	[Everyone]	*/platform/administrators	
portal::classic::homepage	Home Page	[Everyone]	*/platform/administrators	
group::platform/guests::link	Link	[*/platform/guests]	*/platform/administrators	
group::organization/management/execution	Organization Management	[*/organization/management/execution]	manager:/organization/management	

Add New Page

Illustration 10: Page Management

2. Click **Add New Page**.

The form to add a new page will be displayed:

The screenshot shows a web interface for 'Page Setting'. It has three tabs: 'Page Setting' (active), 'Page Layout', and 'Permission Setting'. The 'Page Setting' tab contains the following fields:

- Page Id :** An empty text input field.
- Owner type:** A dropdown menu with 'group' selected.
- Owner Id:** A dropdown menu with '/customers' selected.
- Page name:** A text input field containing 'eXoPartners' with an asterisk (*) to its right.
- Page title :** A text input field containing 'eXo Partners'.
- Show Max Window :** A checkbox that is checked.

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

Details:

- Page Id:** The page's identification string which will be automatically generated when the page is created.
- Owner type:** If the page's **Owner type** is "portal", the page will be created for a portal. This means that only users who have edit permissions at the portal level can create this page type. Accordingly, the name of the current portal will be automatically selected for **Owner id**, ensuring that the **edit permissions** are assigned to users who can edit the current portal.
If the page's **Owner type** is "group", the page will be created for a group. As a result, only users who have the **manage permissions** for that group can create this page type.
- Owner Id:** The identification name of the page's owner which will be automatically created after you have selected **Owner Type**.
- Page Name:** The name of page which is required and must be unique. Only alphabetic, numeric and underscore characters are allowed with the length from **THREE** to **THIRTY** characters.
- Page title:** The title of page. This field is optional with the length from **THREE** to **ONE HUNDRED TWENTY** characters.
- Show Max Window:** The option enables the page to be shown at the maximum size or not.
3. Define the page layout in the **Page Layout** tab.
 4. Define permissions in the **Permission Setting** tab.
 5. Click **Save** to accept creating a new page, or **Cancel** to quit the form.



The **Permission Setting** tab will disappear when you select "user" as **Owner type**.

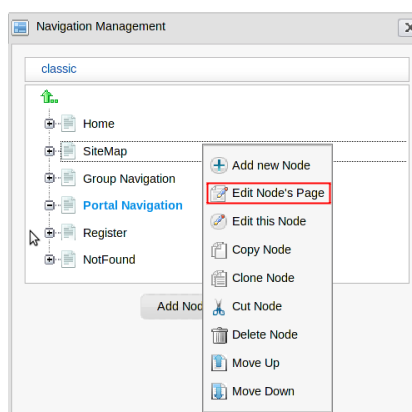
4.3.3 View/Edit page properties

To view page properties, you have to open the **Page Editor**.

1. Open the **Page Editor** page by following one of the two ways:

The 1st way:

- Open the **Navigation Management** form by doing the steps stated in **Section 4.1.5, Edit navigation & configuration of portal**.
- Right-click your desired node and select **Edit Node's Page** in the drop-down menu.



The 2nd way:

- Go to **Group → Administration → Page Management**.
- Click corresponding to the page you want to edit.

Administration ▾				
Search: <input type="text"/>		Owner type ▾		
Page Id	Title	Access Permission	Edit Permission	Action
user::root::Tab_0	Tab_0	[]		
group::/platform/administrators::com	Community Management	[manager:/platform/administrators]	manager:/platform/administrators	
portal::OpenSource::groupnavigation	Group Navigation	[*/:/platform/users]	*/:/platform/administrators	
portal::eXoSEA::groupnavigation	Group Navigation	[*/:/platform/users]	*/:/platform/administrators	
portal::classic::groupnavigation	Group Navigation	[*/:/platform/users]	*/:/platform/administrators	
portal::OpenSource::homepage	Home Page	[Everyone]	*/:/platform/administrators	
portal::eXoSEA::homepage	Home Page	[Everyone]	*/:/platform/administrators	
portal::classic::homepage	Home Page	[Everyone]	*/:/platform/administrators	
group::/platform/guests::link	Link	[*/:/platform/guests]	*/:/platform/administrators	
group::/organization/management/ex	Organization Management	[*/:/organization/management/executi	manager:/organization/management	

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



2. Click  **View Page properties** in the **Page Editor** to edit page properties.

Page Setting | Permission Setting

Page Id : group::/platform/administrators::communityMane

Owner type: group


Owner Id: /platform/administrators

Page name: communityManagement *

Page title : Community Management

Show Max Window : ☐




Save Cancel

- In the **Page Setting** tab, you can not change values in fields, including **Page Id**, **Owner type**, **Owner Id** and **Page name**.
- In the **Permission Setting** tab, you can add more access permissions, or change edit permissions. This tab is only supported for pages of a group or a portal. Because the user's page is private, no one can access or edit the user's page, except the creator. Permission on each page is set in two levels: **Access Permission** and **Edit Permission**.
 - The **Access Permission** sub-tab enables you to see content of a page or “borrow” that page for individual needs by selecting a page for their node. You can click  to remove your granted permissions, or click **Add Permission** button to add more permissions. Check **Make it public** if you want to allow everyone to access.

Page Setting | Permission Setting

Access Permission Setting | Edit Permission Setting

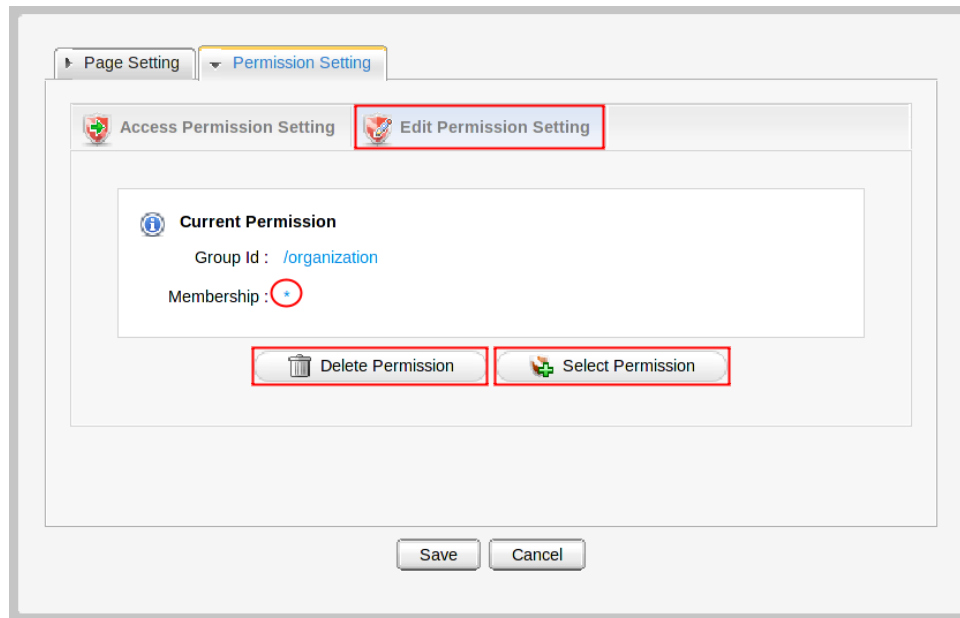
Make it public (everyone can access): ☐

Group Id	Membership Type	Action
/platform/administrators	manager	
/partners	*	
/partners	manager	

Add Permission


Save Cancel

- The **Edit Permission Setting** sub-tab enables you to set or change the edit permission on a page. This permission can be set for one group only with one specific membership type. The asterisk (*) indicates all membership types in the selected group. If you want to re-assign or delete this permission to another group, click **Select Permission** or Delete Permission respectively.



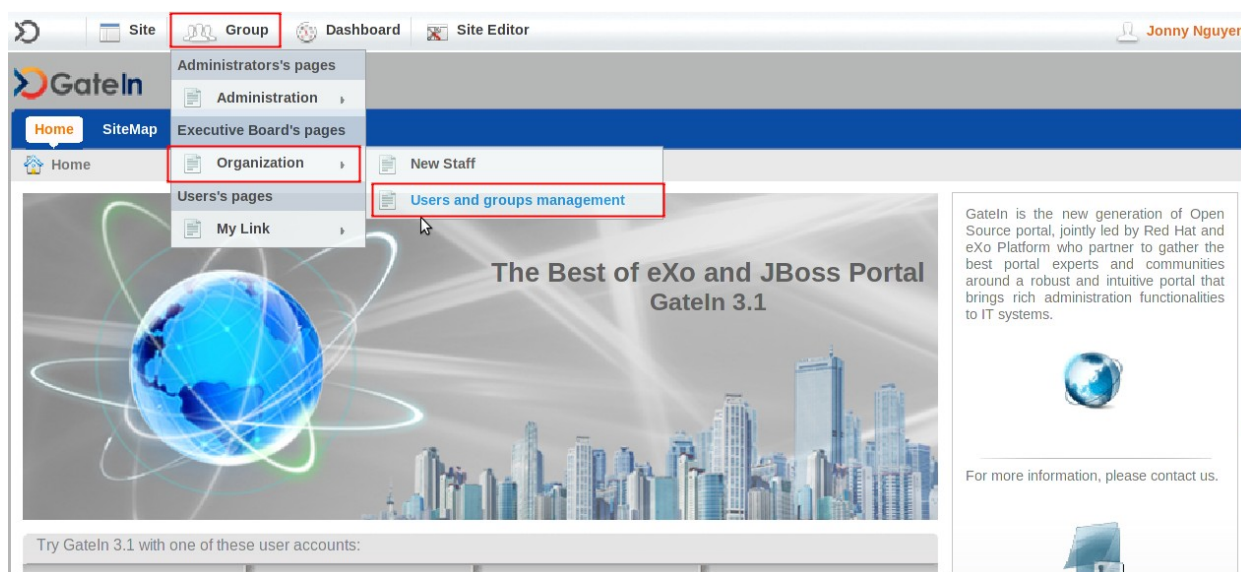
Click **Save** and then select  in **Page Editor** to take effect your changes, or  to abort.

4.3.4 Delete a page

1. Go to **Page Management** by following the 2nd way described in **Section 4.3.3, View/Edit page properties**.
2. Click  corresponding to the page you want to delete.
3. Click **OK** in the confirmation message to accept the deletion, or **Cancel** to discard.

4.4 Manage users and groups

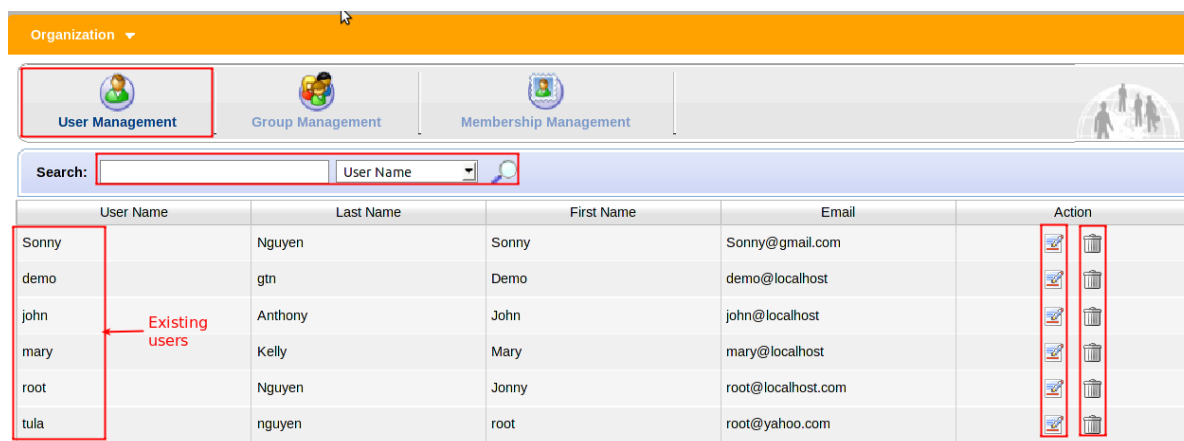
You first need to select **Group** → **Organization** → **Users and groups management** on the administration bar.



The **Organization** form will be shown that enables you to manage users, groups and memberships.

4.4.1 Manage users

You, as an administrator can easily find, edit information of user via **User Management** tab in the **Organization** form. By default, all existing registered users will shown.



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

4.4.1.1 Search for users

You, as an administrator can use this function to search for specific users by **User Name**, **First Name**, **Last Name** or **Email Address**.

Search: <input type="text" value="tu"/> User Name User Name Last Name First Name Email Select a search criterion				
User Name	Enter search term	First Name	Email	Action
root	Nguyen	Jonny	root@localhost.com	
tula	nguyen	root	root@yahoo.com	

1. Type the **Search** term related to the user you want to search. You do not need to enter an exact term.
2. Select the information type you want to search against.
3. Click the magnifying glass icon to perform the search.

4.4.1.2 Edit user's information and settings

1. Click corresponding to the user with information and settings you want to edit.
- In the **Account Info** tab, you can view and change essential information of the selected user, except username. Check the **Change Password** box to show **New Password** and **Confirm Password** fields. Remember that the password length of the password must be between **SIX** and **THIRTY** characters.

Account Info
User Profile
User Membership

User Name: *

First Name: *

Last Name: *

Email Address: *

Change Password: ☒

New Password: *

Confirm Password: *

- In the **User Profile** tab, you can view and change personal information of the selected user, including **Profile**, **Home** and **Business**. You can also change the display language for that user by selecting another language from the **Language** field where all available languages are displayed in the alphabetical order.
- **User Membership** tab is to view user's information in groups.

- The **User Membership** tab indicates to the group to which the selected user belongs. For example, **tula** is the member of the group **users** with the parent group as **platform**.

User Name	Group Id	Membership Type	Action
tula	/platform/users	member	

To remove the selected user from a group, click .

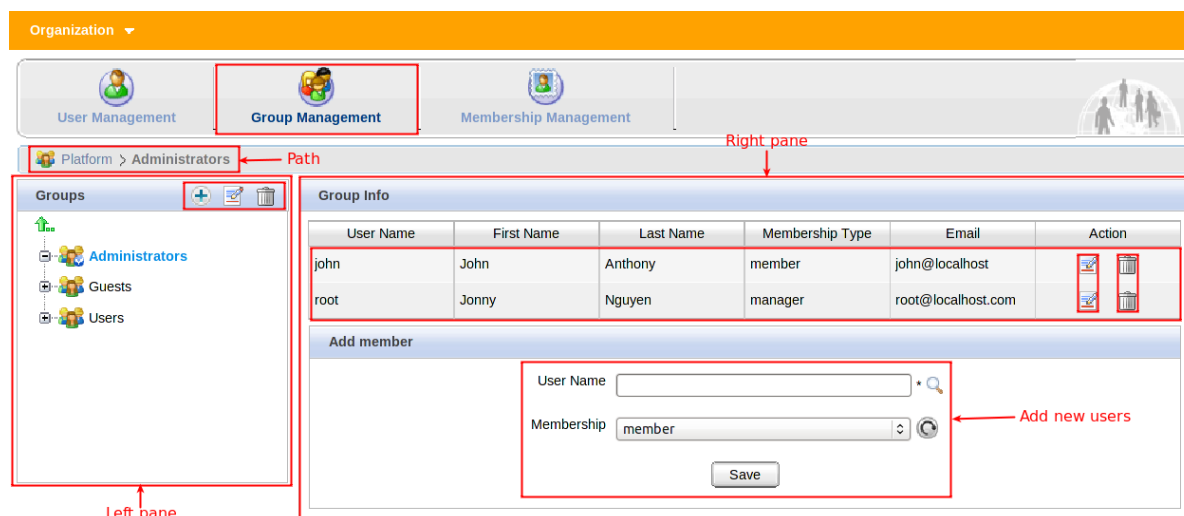
2. Click **Save** to save all changes, or **Cancel** to discard.

4.4.1.3 Delete a user

- Click corresponding to the user who you want to delete in the main **User Management** form.
- Click **OK** in the confirmation message to accept, or **Cancel** to quit.

4.4.2 Manage groups

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



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

4.4.2.1 Add a new group

1. Choose the path to create a new group by selecting the group from the list on the left pane or by clicking if you want to create a group at a higher level. The selected path is displayed in the breadcrumb bar.
2. Click in the left pane. The **Add New Group** form will be displayed on the right pane.

The 'Add New Group' form is displayed. It has three main input fields: 'Group Name' (with a required asterisk), 'Label', and 'Description'. The 'Group Name' field contains 'ReleaseTeam'. The 'Label' field also contains 'ReleaseTeam'. The 'Description' field contains the text 'This is group for members of Release Team to share experiences related to job and life.' At the bottom of the form are two buttons: 'Save' and 'Cancel'.

Details:


- Group Name:** The name of group which is required with the length from **THREE** to **THIRTY** characters. Only alphanumeric and underscore characters are allowed and it must be unique.
- Label:** The display name of group with the length from **THREE** to **THIRTY** characters.
- Description:** The brief description about the group with the length from **0** to **255** characters.

3. Fill values in fields.
4. Click **Save** to accept entered values, or **Cancel** to quit.



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

4.4.2.2 Edit a group

1. Click the group you want to edit in the left pane.
2. Click  in the left pane to show the **Edit Current Group** form of the selected group.

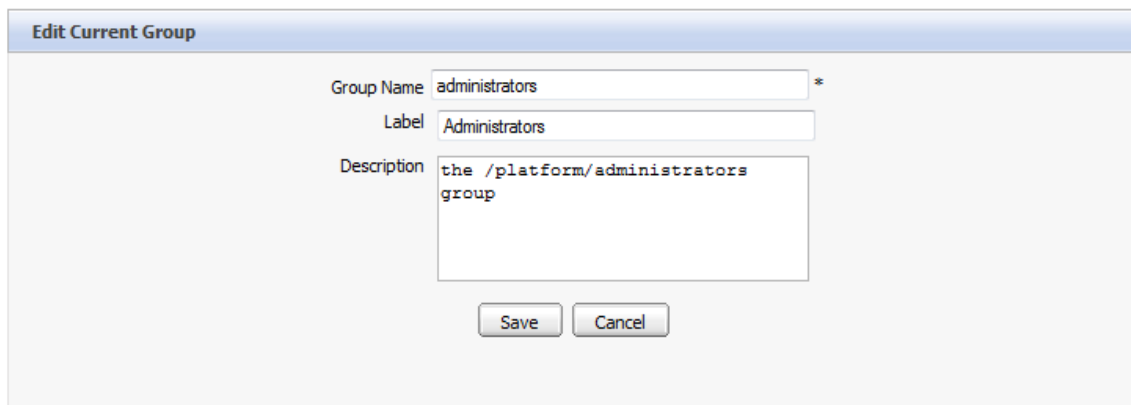


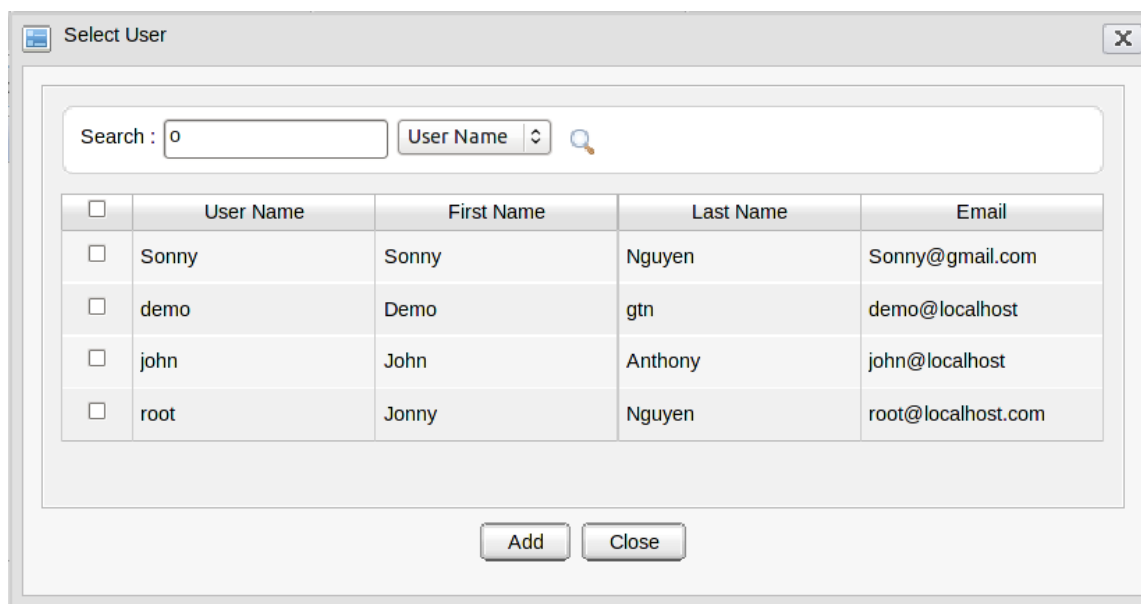


Illustration 11: The Edit Current Group form

3. Make changes in fields, except **Group Name**.
4. Click **Save** to accept changes, or **Cancel** to discard without any changes.

4.4.2.3 Add a new user to a group

1. Select the path to the group which you want to add a new user to that group by selecting that group on the left pane.
2. Enter the exact **User Name** of the user that you want to add to the selected group; or you can enter at least one character if you are not sure about the exact spelling.
 - Click  to search by the characters you entered.
 - After you click , there will be a list of all existing users whose User Names include the entered characters. For example, if you enter 'o', you will get the following result.

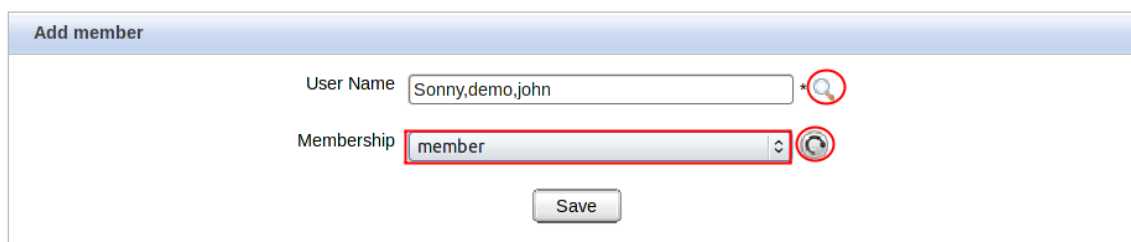


The 'Select User' dialog box contains a search bar with the text 'Search : 0' and a dropdown menu labeled 'User Name' with a search icon. Below the search bar is a table with the following data:


<input type="checkbox"/>	User Name	First Name	Last Name	Email
<input type="checkbox"/>	Sonny	Sonny	Nguyen	Sonny@gmail.com
<input type="checkbox"/>	demo	Demo	gtn	demo@localhost
<input type="checkbox"/>	john	John	Anthony	john@localhost
<input type="checkbox"/>	root	Jonny	Nguyen	root@localhost.com

At the bottom of the dialog are 'Add' and 'Close' buttons.

- Select the checkboxes corresponding to users you want to add to the group.
- After clicking **Add**, you will see the complete User Names in the **Add member** form.



The 'Add member' form has a blue header. It contains a 'User Name' field with the text 'Sonny,demo,john' and a search icon. Below it is a 'Membership' dropdown menu with 'member' selected and a refresh icon. At the bottom is a 'Save' button.

3. Select the membership for the user in a group from the **Membership** list. You can use  to update the membership list in case there are any change.
4. Click **Save** to accept adding the selected user to a specific group with the selected membership type.



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

4.4.2.4 Edit a user membership in a group



1. Click  corresponding to a specific user with a membership in the **Action** column in the right pane.

Illustration 12: The Edit Membership form

2. Change the membership of the selected user by selecting another value in the **Membership** list.
3. Click **Save** to complete changing; or **Cancel** to discard.

4.4.2.5 Delete a group







1. Click the group you want to delete in the left pane.
2. Click  to delete the selected group.
3. Click **OK** in the confirmation message to accept deleting, or **Cancel** to quit without deleting.



- After being deleted, all information related to that group, such as users and navigation is also deleted.
- You cannot delete the mandatory groups, including Platform; Platform/guests; Platform/users.

4.4.3 Manage memberships

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

Membership name	Created date	Modified date	Description	Action
member	10:32:37 2010-11-30	10:32:37 2010-11-30	member membership type	 
manager	10:32:37 2010-11-30	10:32:37 2010-11-30	manager membership type	 
validator	10:32:37 2010-11-30	10:32:37 2010-11-30	validator membership type	 

Add/Edit Membership

Membership name


Description

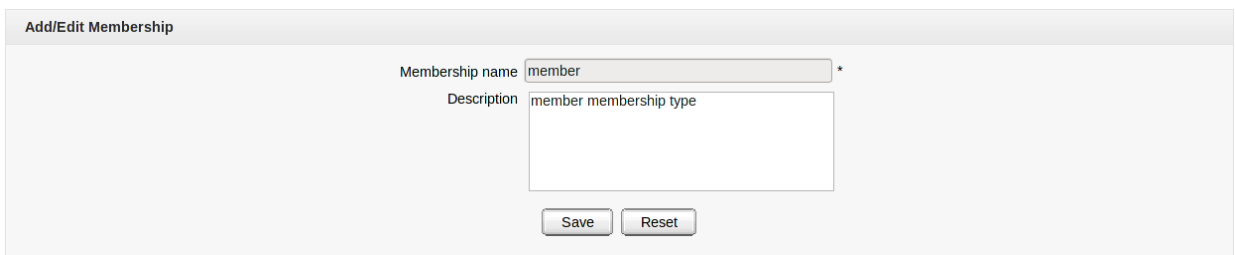
By default, there are **THREE** membership types: Manager, Member and Validator. The "Manager" membership has the highest right in a group.

4.4.3.1 Add a membership type

1. Input values into fields of the **Add/Edit Membership** form. The **Membership name** field is required with only letters, digits, dots, dashes and underscores without ANY SPACES.
2. Click **Save** to accept adding a new membership, or **Reset** to clear entered values.


4.4.3.2 Edit a membership type

1. Click  corresponding to the membership type you want to edit in the **Action** column. Information about the selected membership type will be updated automatically in the **Add/Edit Membership** form.



2. Make desired changes in the **Description** field. You cannot change **Membership name**.
3. Click **Save** to save all changes.

4.4.3.3 Delete a membership type

1. Click  in the row of the membership type you want to delete.
2. Click **OK** in the confirmation message to accept deleting, or **Cancel** to discard.

4.5 Manage navigations

4.5.1 Portal's page navigation

The group **/platform/administrators** can do actions related to the page navigation of a portal, including adding/deleting portals, editing layout/navigation/portal configuration.



- The page navigation of portal is created automatically when a portal is created.
- The navigation will be deleted automatically after you have deleted its portal.

4.5.2 User's page navigation

Actions related to the page navigation of users include: Add new pages, Edit page, Edit page layout. These actions are based on permission settings set to a page.



- The page navigation of a user will be created automatically when the user is created (registered).
- Only the user who is the owner of the user page navigation can edit it.
- Noone can create a user page navigation so that no one can delete it. The navigation will be

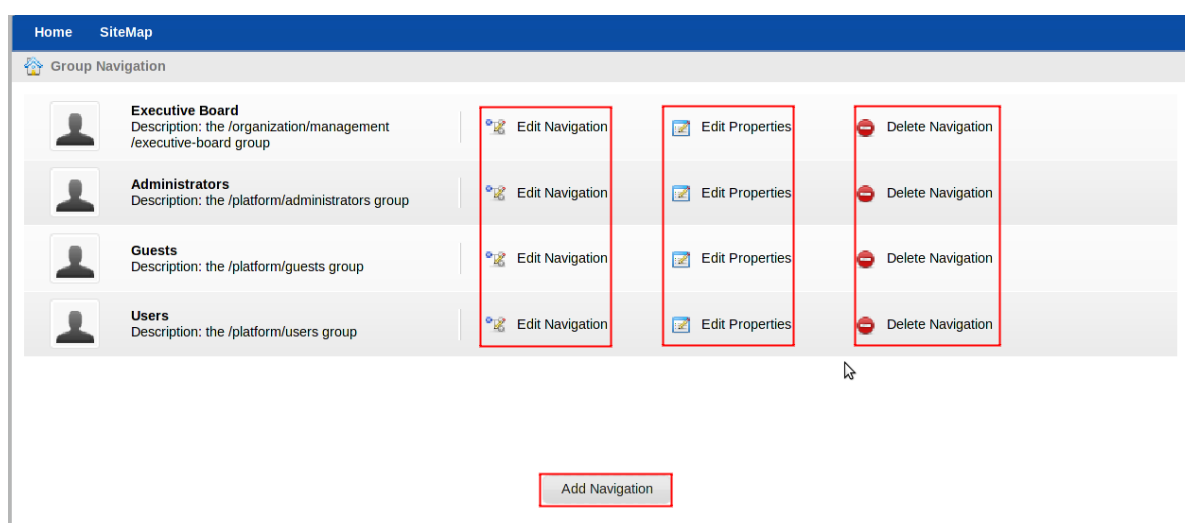
deleted automatically when its user is deleted.

4.5.3 Group's page navigation


Each group has only one page navigation. Only managers of the navigation group and users of the administrators group can add/list/edit/delete the navigation or edit properties.

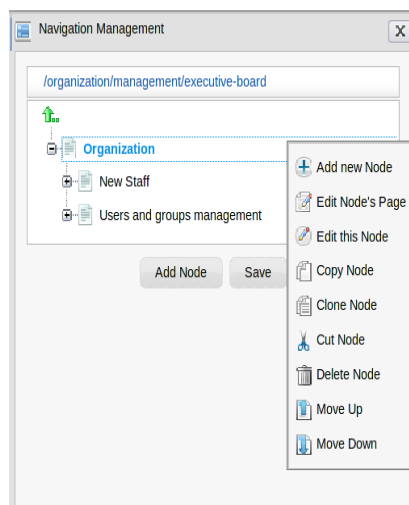
To manage the group's page navigation, click **Group** on the administration bar.

The **Group Navigation** page will appear:



4.5.3.1 Edit group's page navigation

Click  **Edit Navigation** corresponding to the group navigation you want to edit. The **Navigation Management** form will appear:

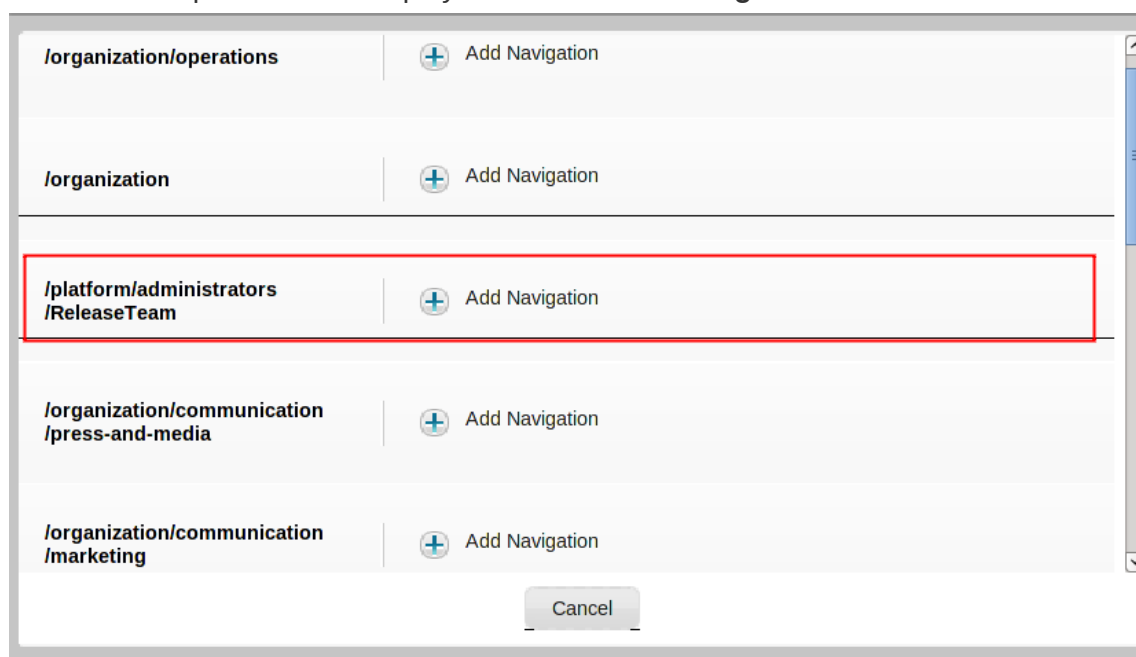


In this form, you can edit the group's page navigation through doing many actions, such as adding a new node to this group, cloning, moving up/down, and more. To learn more about specific actions, refer to 4.1.2.

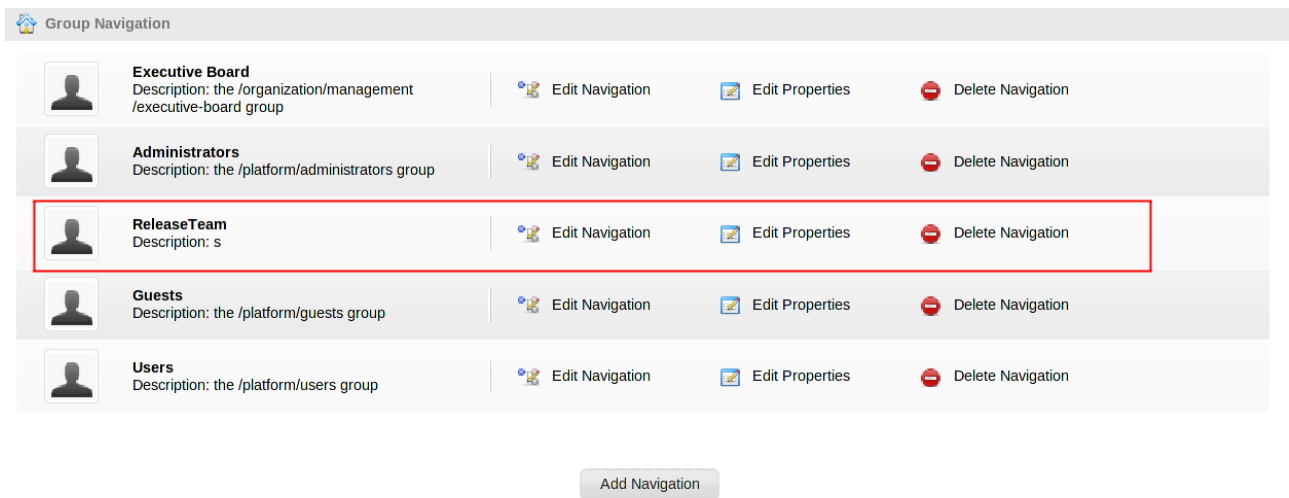
4.5.3.2 Create a new page navigation

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

1. Select **Add Navigation** at the bottom of **Group Navigation** form.
The Groups list will be displayed with the **Add Navigation** buttons.



2. Click **Add Navigation** corresponding to the group you want to add the new page navigation, for example, the page navigation of Release Team.
After being added, the new group navigation will be displayed in the **Group Navigation** page.



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

4.5.3.3 Change priority of page's navigation

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

1. Click **Edit Properties** corresponding to the navigation you want to edit. The **Page Navigation Form** enabling you to change the priority of the selected navigation will appear:

The screenshot shows a 'Page Navigation Form' dialog box. Inside, there is a 'Page & Navigation Explorer' section with the following fields:

- Owner Type :
- Owner Id :
- Priority :


At the bottom of the form are two buttons: 'Save' and 'Close'.

Illustration 13: The Edit Navigation form

2. Select another priority from the available priorities list.
3. Click **Save** to accept changes, or **Close** to quit.

4.5.3.4 Delete a group's navigation

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

1. Click  **Delete Navigation** corresponding to the navigation you want to delete.
 2. Click **OK** to accept deleting in the confirmation message.
- After the navigation deletion has been confirmed, the selected navigation will be removed from the **Group Navigation** page and its nodes/hyperlinks to pages will also be deleted.

4.6 Manage permissions

To manage permissions, you need to learn about the concept **mandatory**. The **mandatory** is one of required conditions of system. **GateIn** provides two types of mandatories, including:

- Mandatory membership type: member.
- Mandatory groups: `/platform/administrators`, `/organization/management/executive-board`, `/platform/users`, `/platform/guests`. These groups are set by default in eXo Platform.

Details:

- The group **/platform/administrators** contains portal administrators with the highest rights related to the system, such as creating/editing/deleting new portals/pages.
- The group **/organization/management/executive-board** contains administrators having rights related to management of users and groups.
- The group **/platform/users** contains members of the portal. Any registered users automatically become members of this group.
- The group **/platform/guests** contains users with the lowest permissions in the portal.

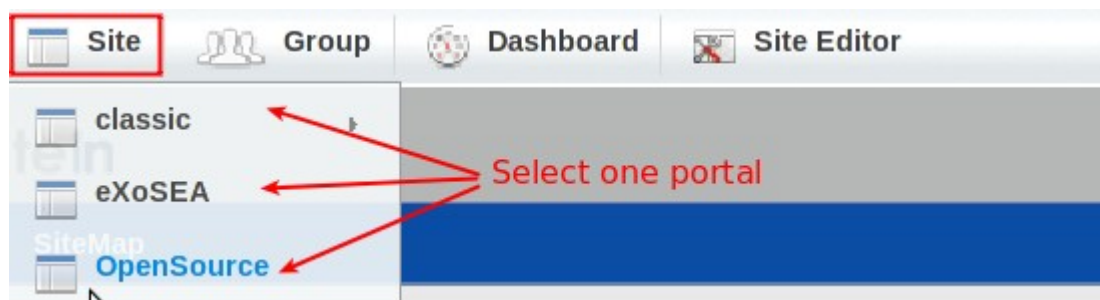
Seeing a page in public means that you can access that page without signing in. To make a page accessible to the public, you have to follow these instructions:

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

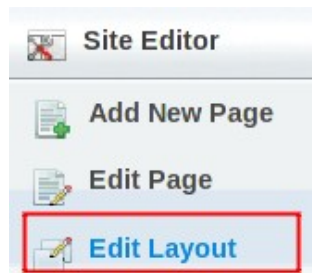
4.6.1 Go to Permission Setting on a portal/page

Portal:

- For new portals, simply click **Site**, and then select **Add New Portal** in the **Portal Navigation** form → **Permission Setting** tab.
- For existing portals:
 1. Hover your cursor over **Site** on the administration bar and then select your desired portal from the drop-down menu.






2. Select **Site Editor** → **Edit Layout** on the administration bar.



3. Click  **Site's Config** in the **Edit Inline Composer**, then select **Permission Setting** tab.

Page:

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

- If the owner type of a page is "user", you do not have to set permission, no one except the creator has the access and edit permission.
- If the owner type of a page is "group", initial permissions on page are:
 - *Access permission*: everyone in that group.
 - *Edit permission*: the manager of that group.
- If the owner type of a page is portal, initial permissions are:
 - *Access permission*: users who can access that portal.
 - *Edit permission*: users who can edit that portal.
- For a new page, simply hover you cursor over **Group** → Select **Administration** → **Page Management** → **Add New Page** → Select "group" or "portal" in the **Owner Type** field → **Permission Setting** tab.
- For an existing page, do one of the following ways:
 - Hover your cursor **Group** → **Administration** → **Page Management** →  → Select  **View Page properties** of the **Page Editor** form → **Permission Setting** tab.
 - Click **Group** (on the Administration bar) → **Edit Navigation** → Select and right-click the node containing the page you want to edit → Select **Edit Node's Page** → Select  **View Page properties** of the **Page Editor** form → **Permission Setting** tab.

4.6.2 Set access permission on a portal/page

To access a portal/page, you must belong to one of the groups that have access permission to that portal/page.

To set access permissions on a portal or page, you first need to go to the Permission Setting as described in 4.1.6.1 and select the **Access Permission Setting** sub-tab.

To assign an access permission to users in the public mode (without signing in), simply select the **Make it public** checkbox.

Portal Setting Properties **Permission Setting**

Access Permission Setting Edit Permission Setting

Make it public (everyone can access): ☐

Group Id	Membership Type	Action
Empty data		

Add Permission

Save Cancel

If you do not want everyone to access the portal, deselect **Make it public** and do as follows:

1. Click **Add Permission**. The **Select Permission** form will appear:

Select Permission

Left pane **Right pane**

Browse and select a group **Select a Membership**

- Customers
- Organization
- Partners
- Platform

- member
- manager
- validator
- Moderator
- *

2. Select the group that you want to add on the left pane and then select one membership type on the right pane. In the membership types list, the asterisk (*) indicates any

membership types of the selected group are allowed.

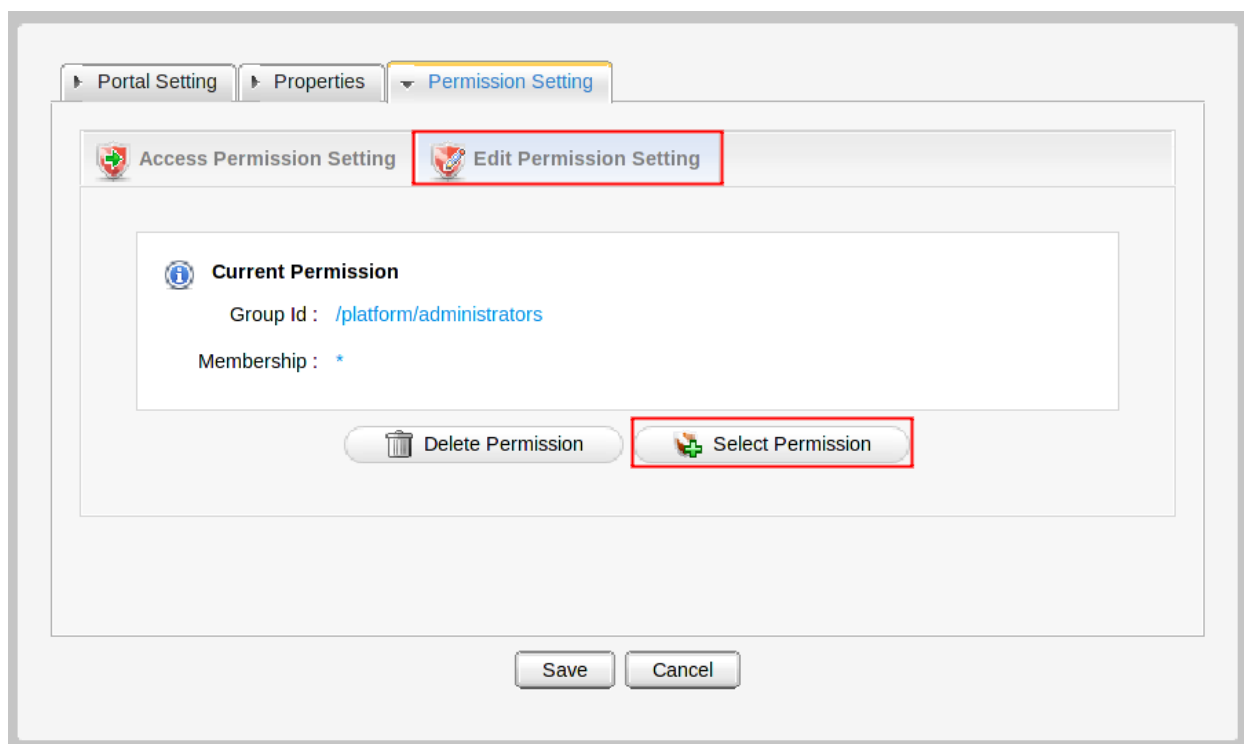
After you have selected a membership type, the selected permission will be displayed in the access right list. If you want to add more, simply click **Add Permission** and select again.

4.6.3 Set edit permission on a portal/page

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

To assign the edit permission on a portal/page, do as follows:

1. Select the **Edit Permission Setting** sub-tab.

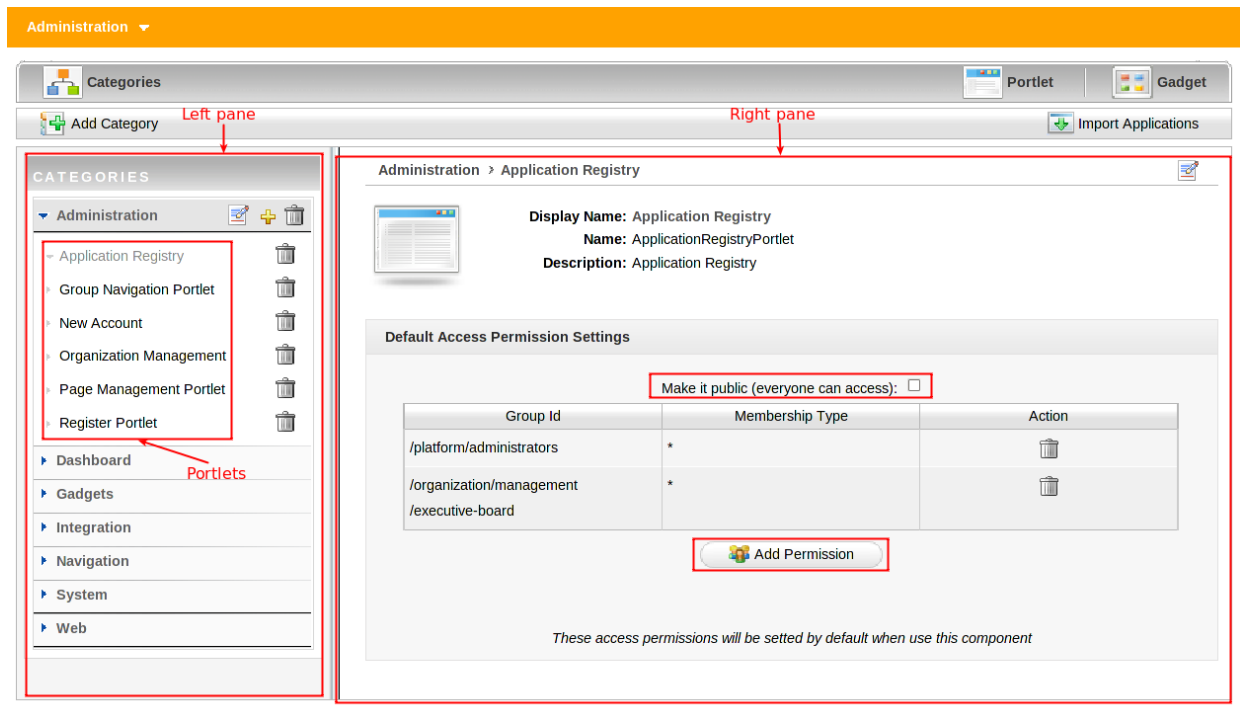


The screenshot shows the 'Permission Setting' sub-tab selected in the top navigation bar. Within this tab, the 'Edit Permission Setting' sub-tab is active and highlighted with a red box. The main content area displays the 'Current Permission' section, which shows the 'Group Id' as '/platform/administrators' and the 'Membership' as '*'. Below this section are two buttons: 'Delete Permission' and 'Select Permission'. The 'Select Permission' button is highlighted with a red box. At the bottom of the form are 'Save' and 'Cancel' buttons.

2. Click **Select Permission** to set new or select another groups. The Select Permission form will appear as described in **Section 4.6.2, Set access permissions on a portal/page**.
3. Select your desired group and membership type.
4. Click **Save** to accept, or **Cancel** to discard.

4.6.4 Set access permission on a portlet

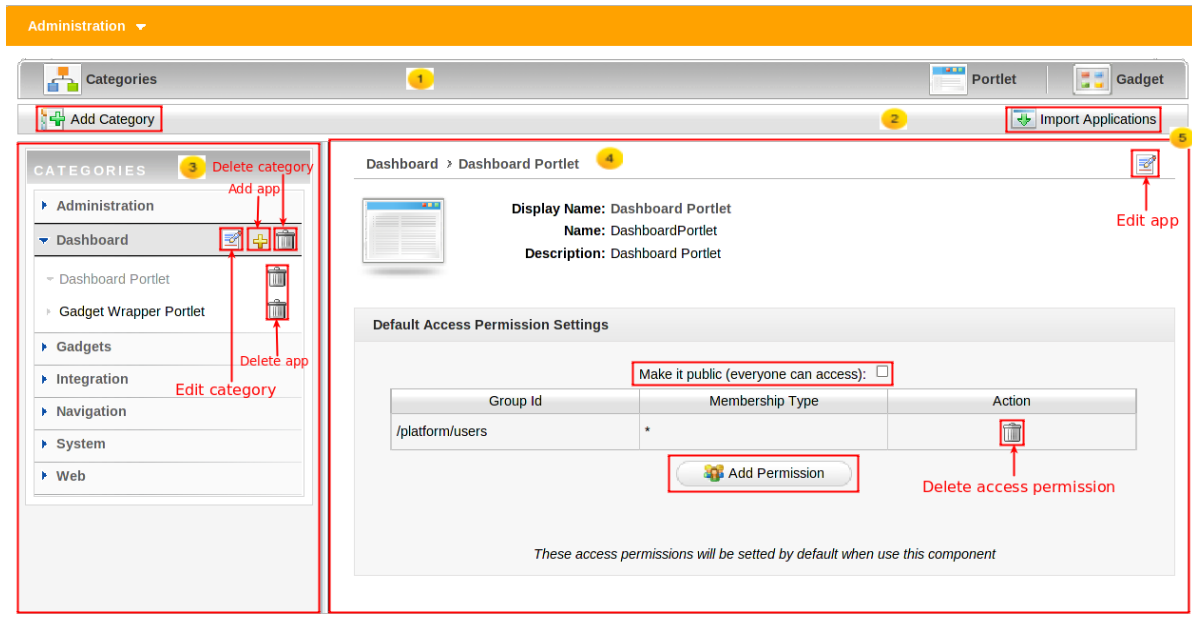
1. Go to **Group** → **Administration** → **Application Registry** on the Administration bar.
2. Select a category containing the portlet you want to set the access permission on the left pane. All portlets of the selected category will be listed right below the selected category.



3. Select your desired portlet. Detailed information of the selected portlet will be displayed on the right pane.
4. Click **Add Permission** to add access permissions to more groups; or check **Make it public** to allow everyone to access.

5 Category, Portlet & Gadget Administration

To administrate category, portlet and gadget, you first need to go to Application Registry by selecting **Group** → **Administration** → **Application Registry** on the administration bar. The form to organize portlets/gadgets into different categories will be displayed as below




Details:


Indicator	Description
1	Tab bar consists of three items, including Categories , Portlet , Gadget .
2	Action bar consists of some actions related to a category.
3	Left pane lists all categories and portlets of each category.
4	Breadcrumb bar is the path from a specific category to a specific portlet in that category.

5	Right pane provides detailed information of a specific portlet.
---	--

5.1 Manage categories

5.1.1 Add a new category

1. Click  Add Category on the action bar to open the form to add a new category.



Details:

In the **Category Setting** tab:

- | | |
|-----------------------|--|
| Category name: | The category's name that you want to add. This field is required and its length must be between THREE and THIRTY characters. |
| Display name: | The category's display name in the list and its length must be between THREE and THIRTY characters. |
| Description: | The brief description of the category. Any length from 0 to 255 characters is allowed. |

3. Enter values in the **Category Setting** tab.

4. Set access permission for your category. Accordingly, another users can only view and use portlets in your category to which they have access.

Category Setting **Permission Setting**

Make it public (everyone can access): ☐

Group Id	Membership Type	Action
Empty data		

Add Permission

For more details about how to set access permission, refer to **Section 4.6, Manage Permissions**.

5. Click **Save** to accept adding a new category to the categories list. Your newly created category will be added to the list in the left pane.

5.1.2 Edit a category

1. Click located next to the title bar of the selected category.
2. Update the category information in the form which is identical to when adding a new category.
3. Click **Save** to apply changes, or **Cancel** to discard.

5.1.3 Delete a category

To remove a category from the categories list, do as follows:

1. Click located next to the title bar of the selected category.
2. Click **OK** to accept deleting in the confirmation message, or **Cancel** to quit.

5.1.4 Add a portlet/gadget to a category

This function helps you add portlets to a specific category easily as follows:

1. Click on the title bar of the selected category to which you want to add portlets. The form to add a portlet to a category will appear in the right pane:

Display Name: ← Enter name

Application Type:

Choose	Display Name	Description
<input checked="" type="radio"/>	IFrame Portlet	IFrame Portlet
<input type="radio"/>	Navigation Portlet	Navigation Portlet
<input type="radio"/>	Console Portlet	Console Portlet
<input type="radio"/>	WSRPAdminPortlet	WSRPAdminPortlet
<input type="radio"/>	HomePage Portlet	HomePage Portlet
<input type="radio"/>	Footer Portlet	Footer Portlet
<input type="radio"/>	Application Registry	Application Registry
<input type="radio"/>	Breadcrumbs Portlet	Breadcrumbs Portlet
<input type="radio"/>	Site Map Portlet	SiteMap Portlet
<input type="radio"/>	Account Portlet	Account Portlet

Radio buttons →

Total pages: 2 « < 1 2 > »

Details:

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

Application Type: The type of the selected object.

2. Select one application type.

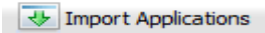
3. Enter one display name into the **Display Name** field, or check the corresponding radio button.

The selected portlet/gadget will be added to the category in the left pane.

5.2 Manage portlets/gadgets

5.2.1 Import portlets & gadgets

This feature enables you to import default portlets and gadgets into different categories as follows:

1. Click  at the right corner on the action bar.

2. Click **OK** to accept importing portlets and gadgets automatically in the confirmation window.

All portlets and gadgets of all categories will be imported and listed on the left pane.

5.2.2 View/Edit detailed information of portlet/gadget

To view detailed information of portlet/gadget, simply select one portlet/gadget in the left pane. The detailed information of that portlet will be shown on the right pane.

The screenshot shows the 'Administration' section of the GateIn interface. On the left, a 'CATEGORIES' sidebar lists various portlets under 'Administration', including 'Application Registry', 'Group Navigation Portlet', 'New Account', 'Organization Management', 'Page Management Portlet', 'Register Portlet', 'Dashboard', 'Gadgets', 'Integration', 'Navigation', 'System', and 'Web'. The 'Application Registry' portlet is selected. The main area displays the 'Administration > Application Registry' page. It shows the 'Display Name: Application Registry', 'Name: ApplicationRegistryPortlet', and 'Description: Application Registry'. Below this is the 'Default Access Permission Settings' section, which includes a checkbox for 'Make it public (everyone can access):' and a table of permissions. A red box highlights the 'Click to edit' icon in the top right corner of the portlet details area. A red arrow points to the 'Add Permission' button below the table. A red arrow also points to the 'Detailed information of Application Registry' text at the bottom of the right pane.

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

To edit a portlet, click on the top corner of right pane. The form to edit will appear:

The 'Edit application information' form contains the following fields:

- Application Name: *
- Display Name:
- Description:

At the bottom are 'Save' and 'Cancel' buttons.

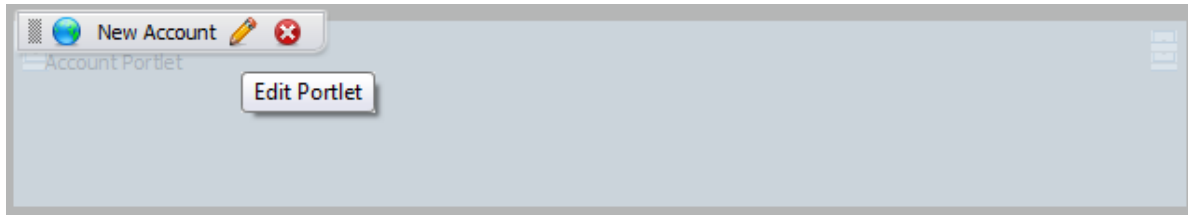
Make changes in fields, except **Application Name**.

5.2.3 Edit a specific portlet

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

1. Create or edit a page as stated in **Section 4.1.3, Edit a portal**. In this step, there will be a container that contains and arranges portlets as contents of that page. You can add a portlet to that page by dragging it from the left pane and dropping it into this container space.

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



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

A screenshot of the 'Portlet Setting' tab in a configuration window. The window has four tabs: 'Portlet Setting' (selected), 'Select Icon', 'Decoration Themes', and 'Access Permission'. The 'Portlet Setting' tab contains the following fields and controls:

- Display Name: Account Portlet
- Portlet Title: New Account
- Width: (empty text box)
- Height: (empty text box)
- Show Info Bar: ☒
- Show Portlet Mode: ☒
- Show Window State: ☒
- Description: New Account

At the bottom of the tab are two buttons: 'Save And Close' and 'Cancel'.

Illustration 14: The Portlet Setting tab

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

The **Portlet Setting** tab includes:

Display Name:	The display name of portlet.
Portlet Title:	The portlet title with the length between THREE and SIXTY characters.
Width:	The portlet's vertical size. The value of this field must be in numeric format.
Height:	The portlet's horizontal size. The value of this field must be in numeric format.
Show Info Bar:	The option enables the information bar to be shown or hidden.
Show Portlet Mode:	The option enables the portlet mode to be shown or hidden.
Show Window State:	The option enables the portlet's window state to be shown or not.
Description:	The brief information about the portlet. The length must be between 0 and 255 characters.



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

The **Select Icon** tab enables you to select an icon for the portlet. By clicking **Get Default**,

you do not have to select any icon from the list, the suitable icon will be gotten automatically.

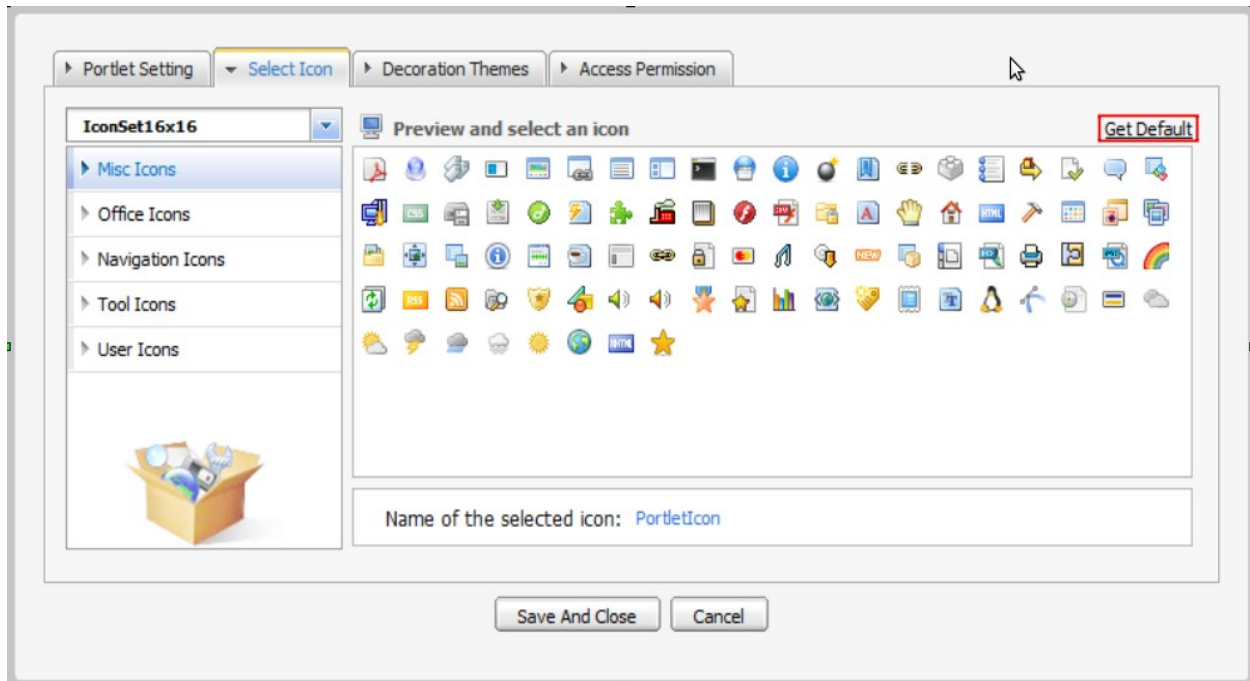


Illustration 15: The Portlet Icon tab

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

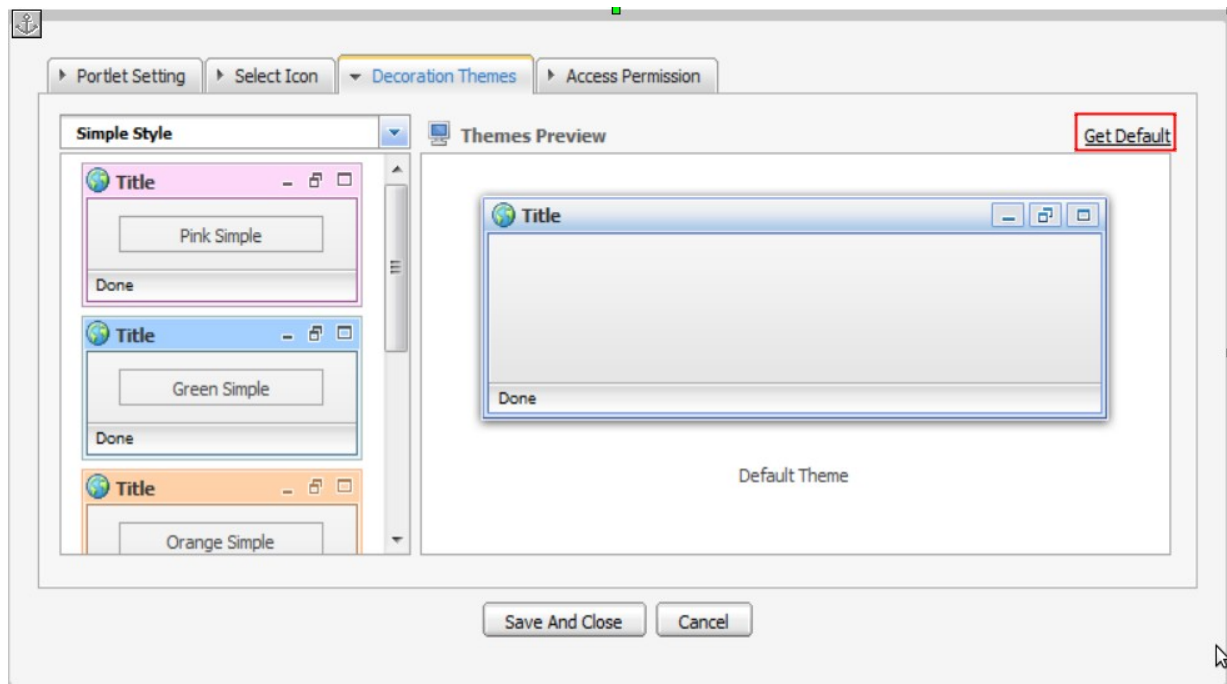


Illustration 16: The Decoration Themes tab

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

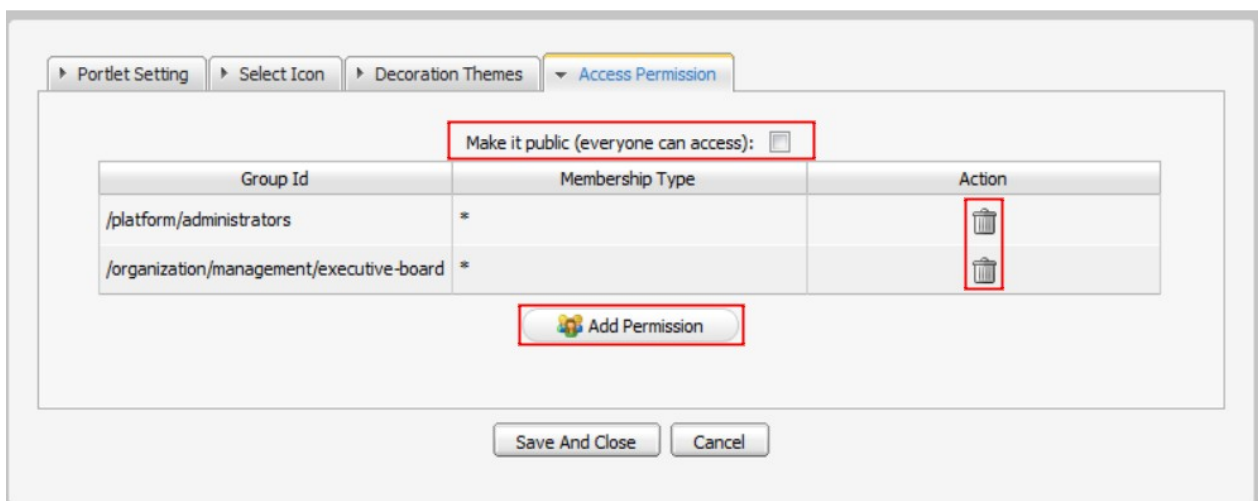
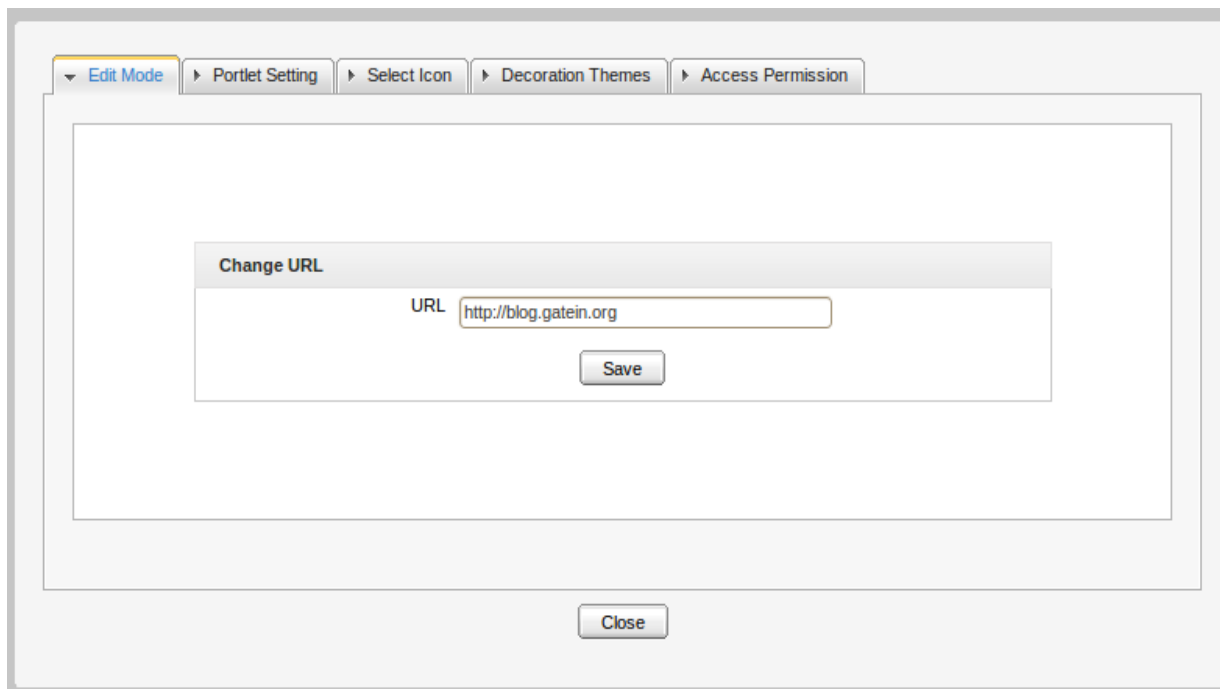


Illustration 17: The Access Permission Tab

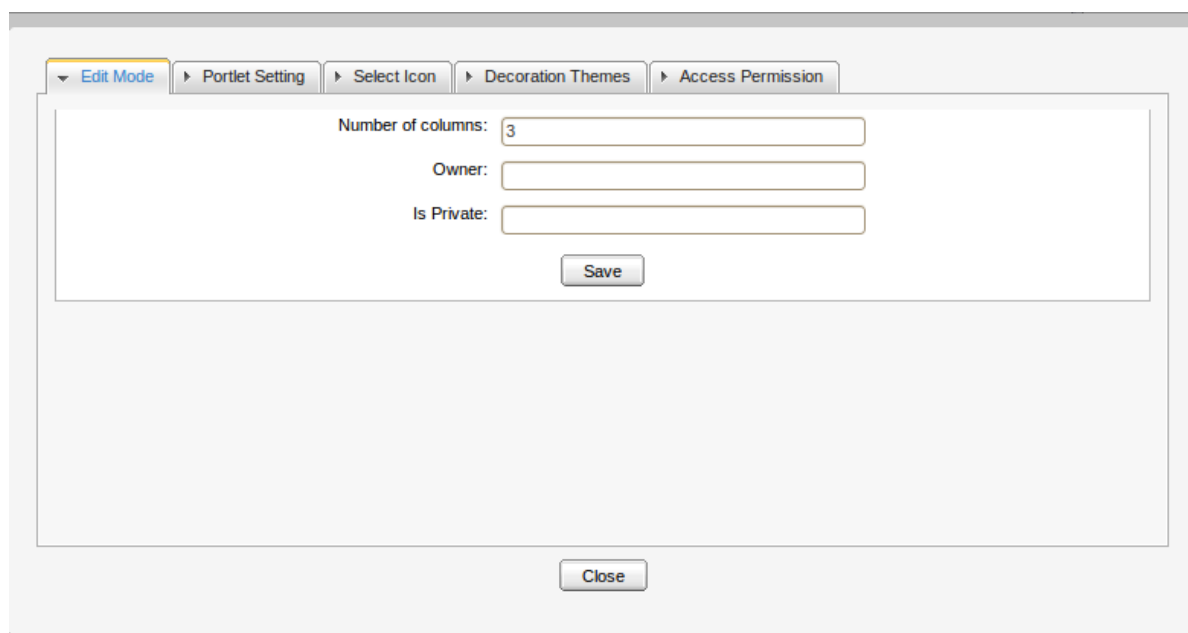
- Some portlets have **Edit Mode** and **Preferences** tabs:
For example:

- IFrame and Dashboard portlets have the **Edit Mode** tab where administrator can define the interface details:



The screenshot shows the 'Edit Mode' tab of the IFrame Portlet configuration window. The window has a title bar with five tabs: 'Edit Mode' (selected), 'Portlet Setting', 'Select Icon', 'Decoration Themes', and 'Access Permission'. The main content area is titled 'Change URL' and contains a 'URL' label followed by a text input field containing 'http://blog.gatein.org'. Below the input field is a 'Save' button. At the bottom of the window is a 'Close' button.

Illustration 18: The Edit Mode tab of the IFrame Portlet

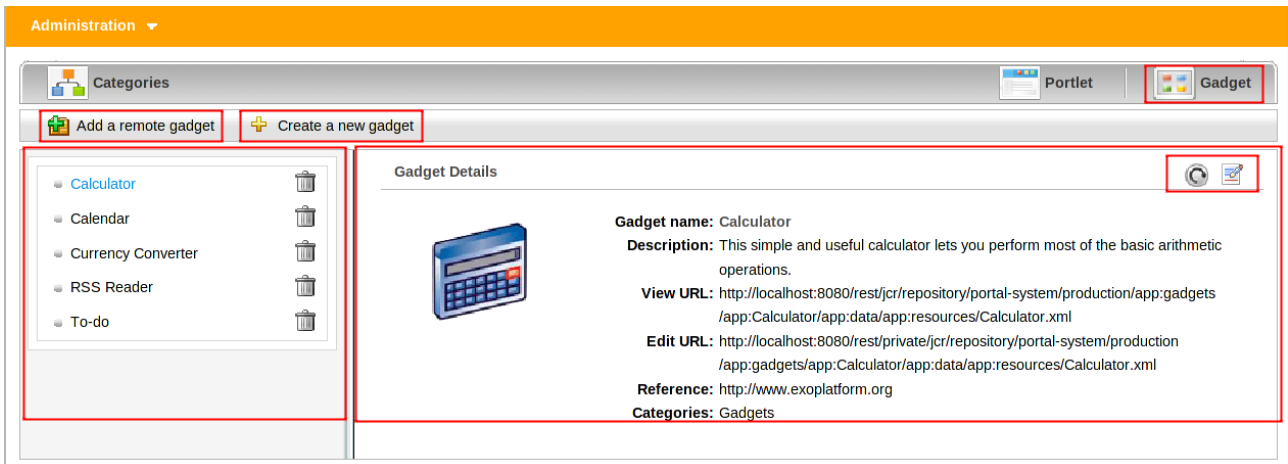


The screenshot shows the 'Edit Mode' tab of the Dashboard Portlet configuration window. The window has a title bar with five tabs: 'Edit Mode' (selected), 'Portlet Setting', 'Select Icon', 'Decoration Themes', and 'Access Permission'. The main content area contains three labels with corresponding text input fields: 'Number of columns:' with the value '3', 'Owner:', and 'Is Private:'. Below these fields is a 'Save' button. At the bottom of the window is a 'Close' button.

Illustration 19: The Edit Mode of the Dashboard Portlet

5.2.4 Add a gadget

To add a gadget, you first need to turning into the **Gadget** page by selecting **Gadget** on the tab bar.



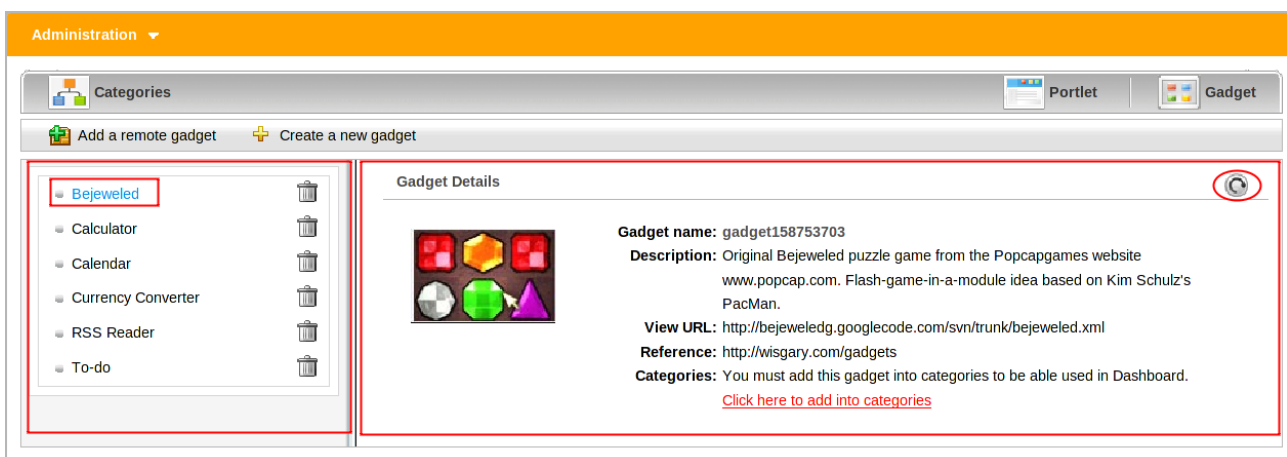
You can add a remote gadget or create a new gadget into the list.

5.2.4.1 Add a remote gadget


1. Click **Add a remote gadget**.
2. Enter the link of your desired gadget which is in the .xml format in the **URL** field.

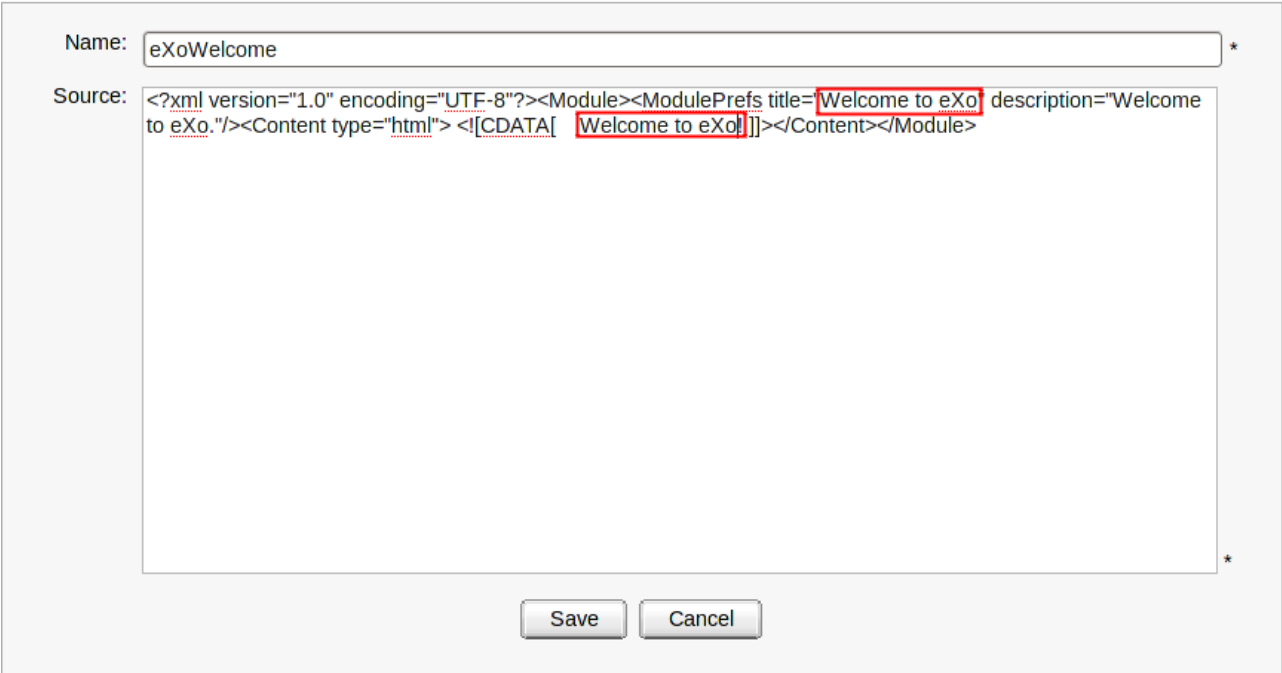
URL

3. Click **Add** to accept the inputted URL, or **Cancel** to quit. The selected gadget will be added to the gadgets list on the left pane with details of gadgets in the right pane.



5.2.4.2 Create a new gadget

1. Click  **Create a new gadget** .
2. Enter values in the form. For example,




Name:

Source:

```
<?xml version="1.0" encoding="UTF-8"?><Module><ModulePrefs title="Welcome to eXo" description="Welcome to eXo."/><Content type="html"><![CDATA[ Welcome to eXo! ]]></Content></Module>
```

3. Click **Save** to accept creating the new gadget.



- To add the newly added remote gadget to a specific category, simply click the red link [Click here to add into categories](#) at the bottom of right pane. The table listing all categories will appear that enables you to select your desired category.
- To update information of the added gadget, simply click  to refresh information.

5.2.5 Add a gadget from the Dashboard

See **Section 3.3.3, Add more gadgets from Dashboard** for more details.