



eXo Content User Guide

Version 2.1

Contents

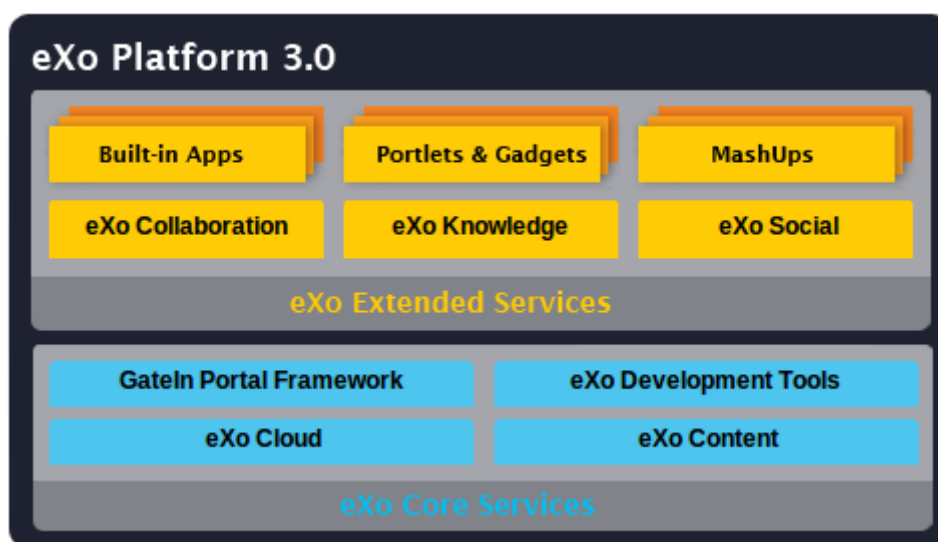
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1 Preface

1.1 Overview

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

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



The foundation for eXo Platform 3.0 is eXo Core Services, a powerful set of REST-based services for rapid website development, content management and gadget-based development and deployment. eXo Extended Services are also a part of the eXo Platform 3.0 running on top of eXo Core Services to enable easy development of rich, user-centric web applications.

eXo Content is one of eXo Core services, it provides a set of services to extend portal-based applications with Enterprise Content Management (ECM) capabilities. Document Management (DMS) features make it easy to catalog and organize enterprise content and with powerful Web Content Management (WCM) services to quickly build dynamic, content-rich websites.

1.2 Why use eXo Content

If you are looking for a powerful tool and strategies in managing website and contents, eXo Content is what you need. eXo Content is designed to provide webmasters who manage websites the way of how to maintain, control, modify and reassemble the content of a web-page easily and effectively. All components of your website can be orgnized, reconstructed easily, which helps you keep your website under control. eXo Content really brings interesting experience for all users and changes their way of thinking about website. The followings are key features of eXo Content:

Website Creation

- **Fast Setup:** Setup a new site in just a few clicks with an intuitive user interface and template features
- **Navigate, Preview and Publish Content:** Navigate through page content in either a single content viewer or the list content display, quickly preview page content or work on new content in draft mode and publish at anytime
- **Templates:** Create websites from exing templates and themes, or create new templates with a consistent look-and-feel across a single site
- **In-site Edition:** The integrated rich text editor allows non-technical users to edit the pages they are in charge of in an intuitive way

Web content organization

- **Web-Based Administration:** Use a web browser to manage sites remotely, no local administration software is required.
- **Manage Multiple Websites:** Manage and control every site in one place
- **Media Library:** Upload media to the library, publish, reuse and update all available media content across multiple websites
- **Content Search:** Search content and documents using categorization and tag features
- **Broken Link Detection:** Know how many broken links are present and how many are functional with ease
- **Versioning & Rollback:** Easily rollback a website's content with automatic versioning
- **SEO & Friendly URLs:** Search Engine Optimization (SEO) is simplified for editing meta tags and more. Content has its own specific URL for easier bookmarking and improved SEO
- **Configuration for Deployment on Web Farms:** Advanced deployment rule for scalable, three-tier web application architecture with partitioned replicated deployment.

Capture & Manage Documents

- **Kofax Plugin:** Collect paper documents, forms, invoices and other unstructured documents and convert into accurate and retrievable information, stored in the eXo JCR.
- **Access Control List:** Validate the current session's permissions to add nodes, set properties, remove or retrieve items. Define actions to launch the next step in a process,

or to invoke any "coded" action required

- **Workflow:** Specify processes for document collaboration and validation
- **Record Management:** Track the status of content completion and control document storage lifecycles.

Store & Access Documents

- **JCR:** eXo JCR allows applications to access or manage files independent of their location, and also provides advanced features such as unified access control, versioning, indexing and more
- **Automatic Backup:** Define and automate tasks to save documents as required
- **Web Interface:** Access documents in an intuitive and user-friendly web interface
- **Microsoft & OpenOffice Plug-ins:** Microsoft and OpenOffice plug-ins give users the freedom to work on documents in their preferred document editing program.

And more: eXo Content also provides other powerful tools to manage and build content-rich websites such as CSS, Java Script & RSS support, advanced document management tool, collaboration tools, etc. All features are to meet your requirements for the purpose of easy site management, cost reduction in managing multiple sites in only one place.

1.3 About this document

The intended reader of this manual are webmasters using eXo Content. This manual will explain all the basic and advanced features that eXo Content provides in managing websites and site content. It gives in-depth examples and easy explanations of eXo Platform technology that allows the webmasters to create and manage a very fast and powerful website.

With the guide, you will:

- learn the basic terminologies used in eXo Content.
- know how to create, manage and publish Site content.
- know how to manage Web pages, set up a website, etc.

1.4 References & related resources

Information

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

Support

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

Download

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

Resource Center

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

2 Overall Introduction

2.1 WCM & DMS

Web Content Management (WCM) is the technologies used to Capture, Manage, Store, Preserve, and Deliver content and documents related to sites. It especially concerns content imported into or generated from within an organization in the course of its operation, and includes the control of access to this content from outside the organization's processes.

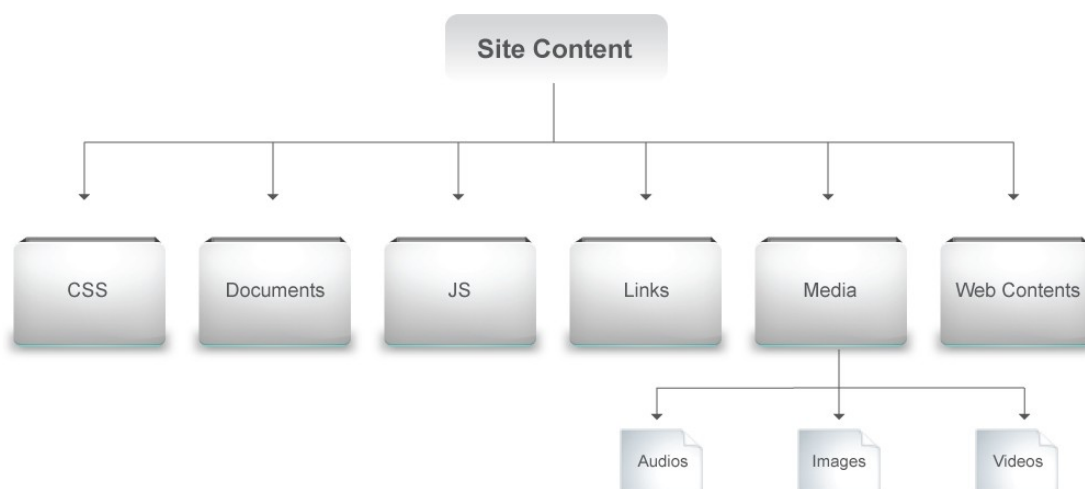
The **WCM** users can manage both structured and unstructured content, so that an organization, such as a business or governmental agency, can more effectively meet business goals (increase the profits or improve the organizational process efficient use of budgets), serve its customers (as a competitive advantage, or to improve responsiveness), and protect itself (against non-compliance, law-suits, uncoordinated departments or turnover within the organization).

WCM improves your operational productivity and efficiency. It allows you to transform unstructured content into structured content through the process of capturing, storing, managing, preserving, publishing and backing up while securely distributing it. The **WCM** portlet gives you a portal solution that can help you achieve these processes and leverage your business content across all formats for competitive gain. It also provides an environment for employees to share and collaborate on digital content and delivering a comprehensive unified solution with rich functionalities. Every component of your website can be organized, reconstructed easily, which helps you keep your website under control.

Document Management System (DMS) - an extension of **eXo Content** is used to store, manage and track electronic documents and electronic images and allows documents to be modified and managed easily and conveniently by managing versions, properties, etc.

2.2 Site Content Structure

Creating a site is a quick process, but deciding what content to put in the site and how to organize it will take a lot of time. Thus, to manage a site more easily and more effectively, a site always has a specific structure as follows:



The Site Content are stored in collaboration workspaces of Java Content Repository (JCR).

Details:

- **CSS:** This file is used to define the presentation of your entire site such as: font, color, size, etc.
- **Documents:** All documents, which are used in a site will be stored in this folder.
- **JS:** A programming script used on the site. This file is used to make a web page more animate and dynamic in terms of graphics and navigation.
- **Links:** This folder stores all links used in the site.
- **Media:** This folder includes three sub folders:
 - Audios:* Store all sound files used in a site
 - images:* Store all images, pictures used in a site
 - videos:* Store all video files used in a site
- **Web content:** This folder is used to store the documents which present main content (texts images, hyperlinks, audios and videos) of the site.

2.3 Web Content

2.3.1. What is Web Content in WCM?

Web Content is the textual, visual or aural content that is encountered as part of the user experience on a website. It may include other things such as texts, images, sounds, videos and animations.

2.3.2. Web Content Structure

The Web content may include various elements. Thus, to create and manage the Web content more effectively and dynamically, each Web Content also has a specific structure:

- *Main content:* It contains all key content such as: texts, images, links, tables, etc.
- *Illustration:* It contains an image that is used as an illustration for the content. Additionally, a summary also can be added to come with this image.
- *default.css:* It contains CSS data which is used to present the web content such as: layout, font, color, and more.
- *default.js:* It contains JS data which is used to make web content more animating and dynamic.

2.4 Terminologies

2.4.1 Repository

A repository is a place where data are stored and maintained. A repository can be:

- A place where data is stored
- A place where specifically digital data are stored
- A place where multiple databases or files are located for distribution over a network
- A computer location that is directly accessible to the user without having to travel across a network
- A place where anything is stored for probable re-usage
- A place to store digital data

2.4.2 Workspace

A content repository is composed of a number of workspaces. Workspace is a term used by several software vendors for applications that allow users to exchange and organize files over the Internet. In the simplest case, a repository just consists of a workspace. In more complex case, a repository consists of more than one workspace. Each workspace contains a single rooted tree item. The “repository” repository contains three workspaces, includes: system, backup and collaboration workspace.

- **System workspace:** is used to reserve “system folders”
- **Backup workspace:** The backup process depends on the published content timestamps, each published document has a duration for which it can be published and when it exceeds the timestamps, it will be automatically archived to the backup database
- **Collaboration workspace:** Allows legal users to validate and manage documents

2.4.3 Drive

A drive can be understood as a data storage device that is used to store folders with many documents in it. In a drive, folders are organized by a tree structure with sub-nodes are other folders or documents. In addition, you also may perform many supported actions on each object type.

On the other hand, a drive is a customized workspace that consists of:

- a configured path from where the user will start when browsing the drive
- a set of allowed views that, for example, will allow to limit the available actions (such as the edition or creation of content while being in the drive)
- a set of permissions to limit the access (and view) of the drive to a limited number of people
- a set of options to describe the behavior of the drive when users browse it

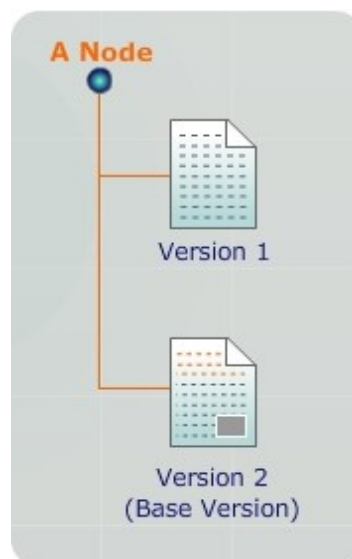
2.4.4 Node

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

A node can be thought of as a logical placeholder for data. It is a memory block which contains some data unit, and optionally a reference to some other data, which may be another node that contains other data. By linking one node with other interlinked nodes, very large and complex data structure can be formed.

2.4.5 Version

Versioning means that at any given time the node's state can be saved for possible future recovery and the action of saving called 'checking in'. A workspace may contain both versionable and non-versionable nodes. A node is versionable if it has been assigned a *mixin type mix: versionable*; otherwise, it is a nonversionable node. A version exists as a part of a version history graph that describes the predecessor/successor relations among versions of a particular versionable node.



Software versioning is the process of assigning either unique version names or unique version numbers to unique states of computer software. Within a given version number category (major, minor), these numbers are generally assigned in increasing order and correspond to new developments in the software. At a fine-grained level, revision control is often used for keeping track of incrementally different versions of electronic information, whether or not this information is actually computer software.

2.4.6 WebDAV

WebDAV stands for Web-based Distributed Authoring and Versioning. It is a set of extensions to the Hypertext Transfer Protocol (HTTP) which allows users to collaboratively edit and manage files on remote World Wide Web servers.

The protocol was to make the Web a readable and writable medium. It provides functionality to create, change and move documents on a remote server (typically a web server or "web share"). This is useful for, among other things, authoring the documents which a web server serves, but can also be used for general web-based file storage that can be accessed from anywhere.

2.4.7 Podcast

A podcast is an audio file that you can download and listen to on your computer or a portable MP3 player such as an iPod. The word itself comes from the combination of two other words: iPod and broadcast.

2.4.8 File Plan

The file plan is the primary records management planning document. Although file plans can differ across organizations, their typical functions are to:

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

2.4.9 Symlink

Symlink is a special file containing a reference to document or folder. By using symlinks, you can easily access specific nodes (target) that symlinks point to. In the Sites Explorer, a symlink has a small chain symbol next to its icon:



Documents.lnk

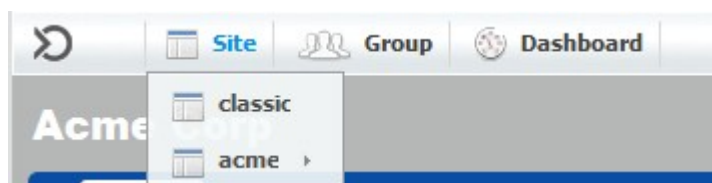
3 How to use WCM & DMS?

3.1 Basic actions in WCM

These actions can be done by users who have the right to use the administration bar with a personal preferences menu.

3.1.1 View a site

In **WCM**, we use the 'Website' term which is equivalent to the 'Portal' term. So, viewing a portal means viewing a website. You can select the site that you want to view by selecting the site name in the drop-down menu on the Administration bar:



The main screen of the site will appear like the illustration below:

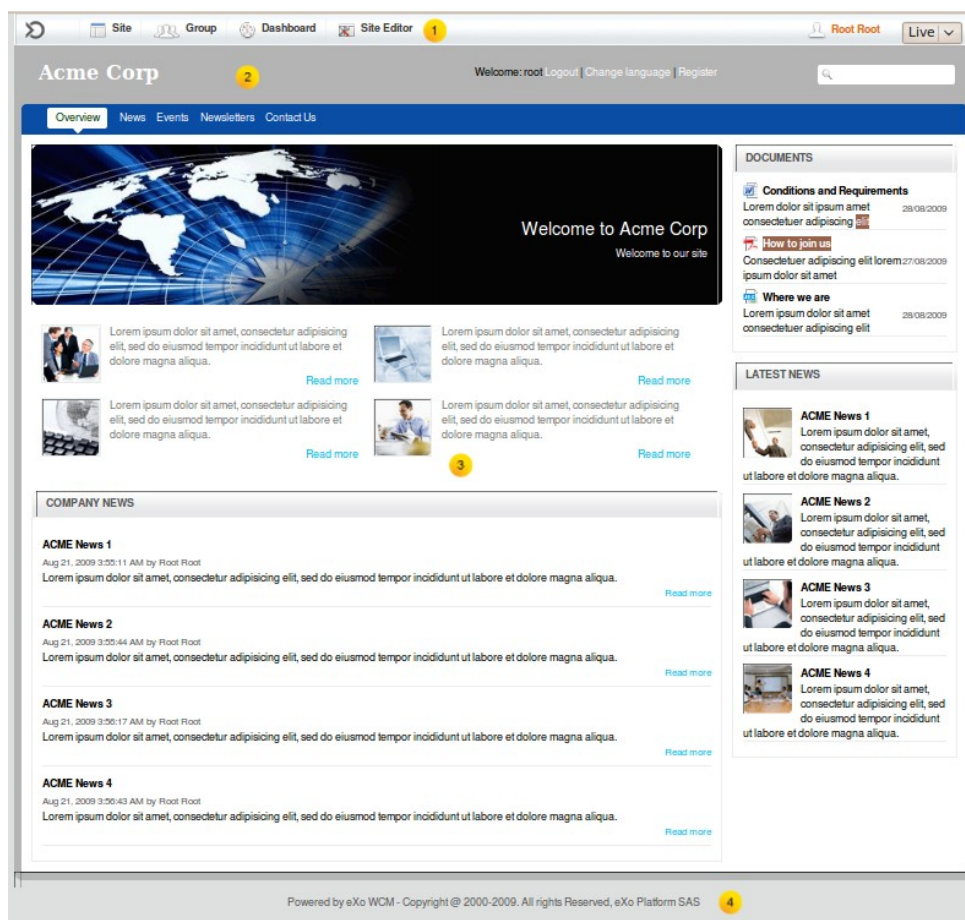


Illustration 1: The Interface of the Acme site

Detail:

Indicator	Meaning
1	This is Administration bar which contains administration functions related to portals (websites).
2	This is Banner which contains slogan, logo, icon used in the website.
3	This is Home page which is the main page of the website. This is the default page that is displayed first when you visit the website.
4	This is Footer of the web site. It can be texts, or image that is displayed at the bottom of the web site. It provides information about author/institutional sponsor, revision date, copyright, etc.

3.1.2 Register an account

To register a new account on the portal, proceed as follows:

Step 1: Go to the portal by inputting the URL in the address bar (e.g: <http://localhost:8080/portal/public/classic>). The anonymous homepage will appear:

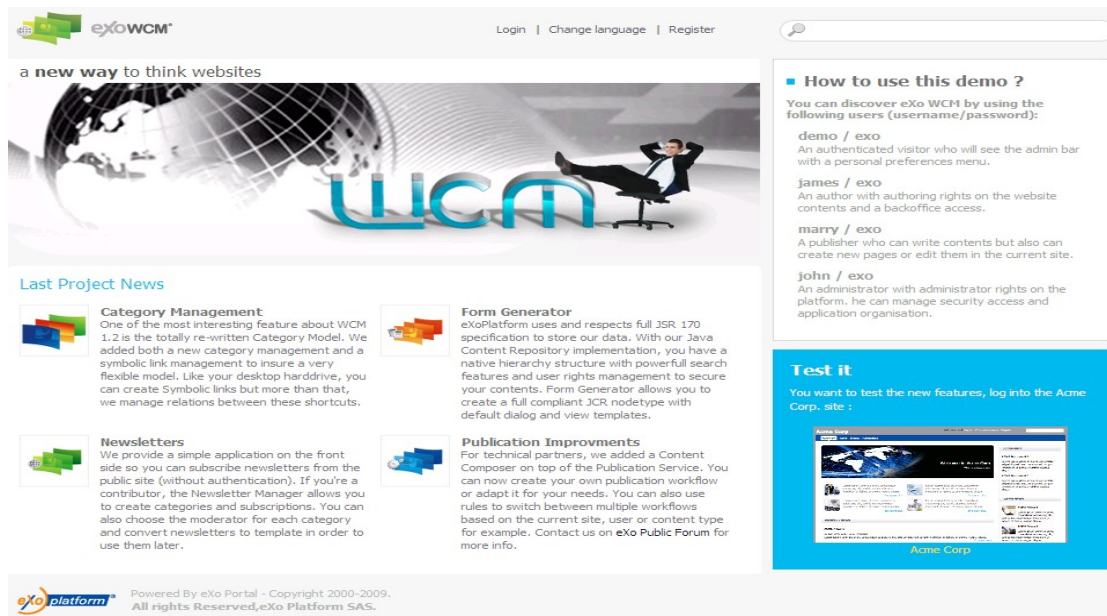


Illustration 2: WCM in the public mode


Step 2: Click the **Register** link on the top of the site, the Register form will be displayed:

(*) required

The **Account Setting** information includes:

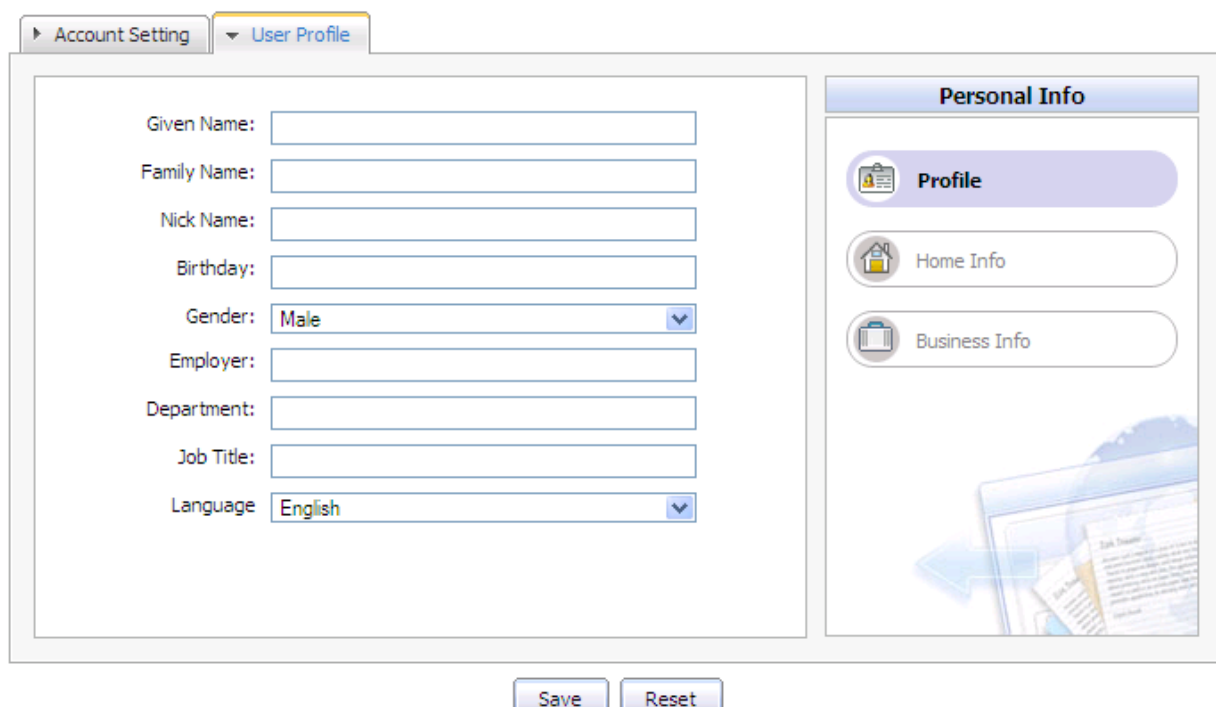
User Name	The user name that is used to login into the system. It must be unique. The user name must be started with a character.
Password	The security characters are used to login. It must have at least 6 characters.
Confirm Password	The re-typed password above. The password in Password field and this field must be the same.
First Name	Your first name.
Last Name	Your last name.
Email Address	Your email address. It must have right format: username@abc.com

Step 3: Input values for fields in this form.

Step 4: Click the  icon to search and check if the inputted user name is available.

Step 5: Input other required fields in the **Account Settings** tab.

Step 6: Input values for the User Profile information, including: Profile information, Home information, Business information.



Step 7: Click **Save** to register a new account, or **Reset** to renew all inputted values. There will be an alert message, and you can not add a new account successfully if at

least one of these cases occurs:

- **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 invalid format.
- Required fields are empty.

After adding a new account, contact with the administrator to get the confirmation.



You should enter your email address exactly because when you forget username or password, you can recover it by using this email address.

3.1.3 Sign in

This function allows you to go into **WCM** in the private mode.

Do as follows:

Step 1: Go to the **WCM** in the public mode by inputting the URL in the address bar (e.g: <http://localhost:8080/portal/public/classic/>)

Step 2: Click the **Login** link at the top of the home page. The **Sign in** form will appear:

Illustration 3: The Sign in form

Step 3: Input your registered **User name** and **Password**.

Step 4: Click **Sign in** to accept, or **Discard** to exit the **Sign in** form.

Details:

User name	To input the registered username.
Password	To input the password of your username.
Forgot your User Name/Password	To retrieve the forgotten username or password when you forget.
Sign in	To sign into the eXo Portal with the inputted username and password.
Discard	To close the Sign In form without any changes.

In case the **User Name** does not exist or the inputted **User name/Password** is invalid, there will be an alert message that requires users to input right values. The page will be redirected to the private security check mode.

To login again, enter **User Name** and **Password** again.

After signing in, you will be redirected to the authenticated homepage:

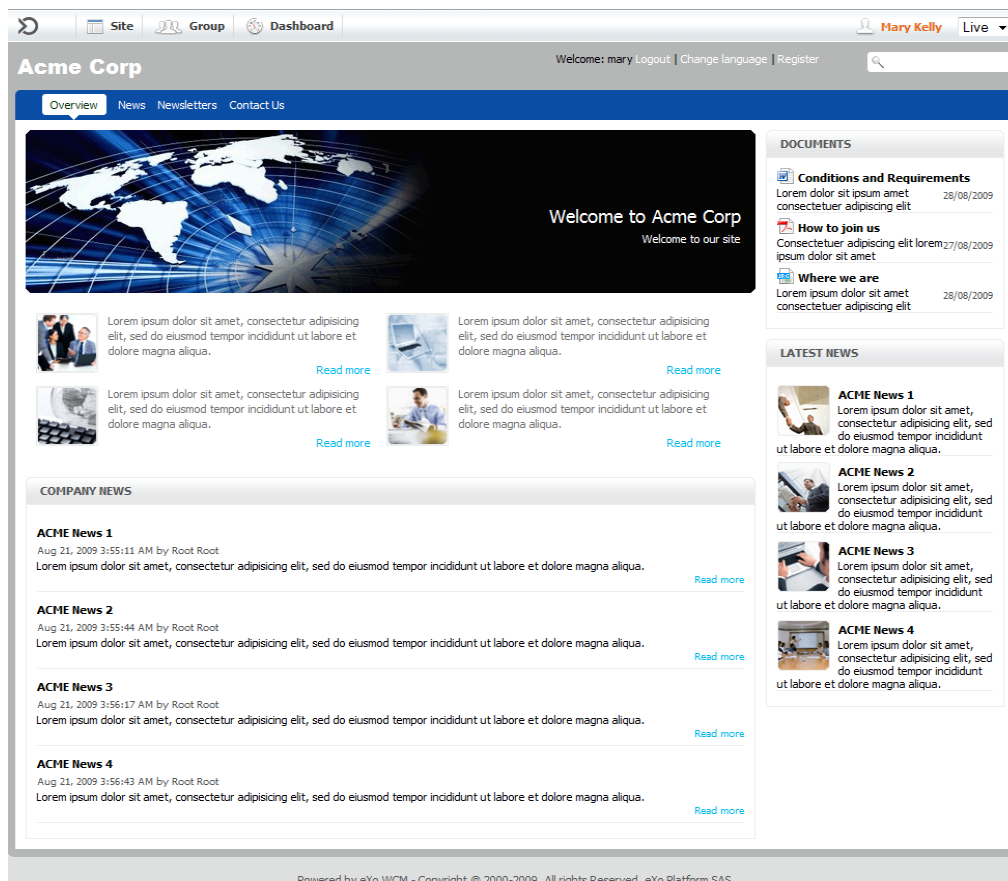


Illustration 4: The main screen of the WCM in authenticated mode

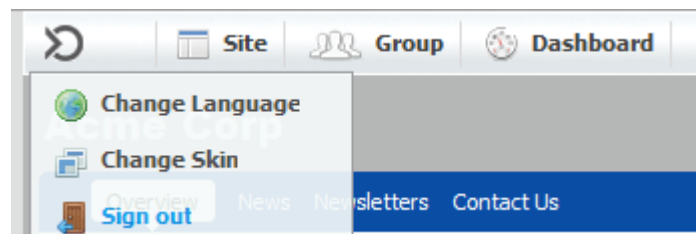
3.1.4 Sign out

The function lets you get back to the anonymous portal. It ends your current portal session.

To sign out, click the **Logout** link on the right access banner:



or click the Start logo at the top left corner of the administration bar and select the **Sign out** form from the menu:



3.1.5 Retrieve username/password

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

Step 1: click the link **Forget your User Name/Password?** from the **Sign in** form.

This form offers two options:

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

Next

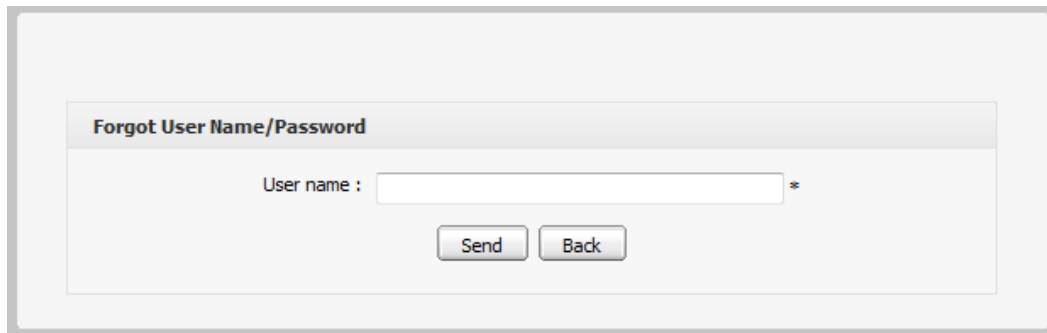
Back

Forgot my password: If you forgot your password, you need to select this option.

Forgot my username: If you forgot your username, you need to select this option.

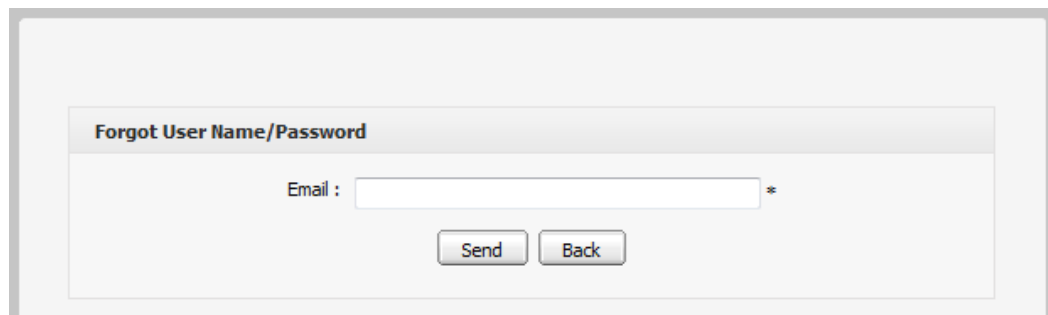
Step 2: Select one of these two options in this form. The selected option will be shown:

If the **Forgot my password** option is selected:



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 and an asterisk (*). Below the input field are two buttons: "Send" and "Back".

If the **Forgot my username** option is selected:



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

Step 3: Enter your username or email in the corresponding form.

Step 4: Click **Send** to send the inputted values.

Once information has been sent, you will receive an email with your User name/ Password in your email address registered by you.

- If you forget User Name: when a username is retrieved, your old username is restored and can be reused and a new password is also sent to your email with the old username.
- If you forget old password: a new password will be set (as temporary, then you will be directed to change the password for the next time you sign in.



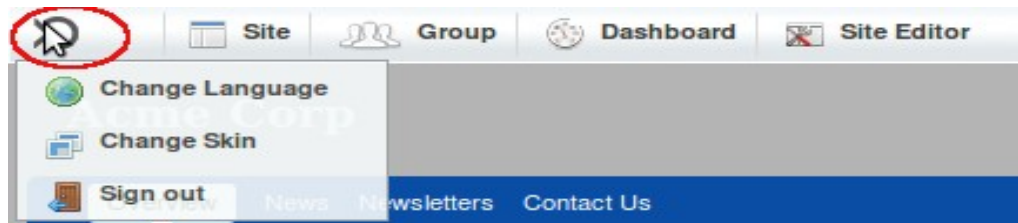
The Username/Password that you received only takes effect for 1 day. It means that if the period is over 1 day from the receipt date, you can not use the receipt username/password, so you will need to get another email active.

3.1.6 Change the display language

The priority order of display language is shown to the following order:

1. User's language 2. Browser's language 3. Portal 's language. Thus, to display your preferred language, you should pay attention to this order to change the language type appropriately.

Step 1: Click the **Change Language** link on the top left corner:



The **Interface Language Setting** form appears:

A screenshot of the 'Interface Language Setting' form. The form has a title 'Interface Language Setting' in blue. Below the title is a table with two columns: the language name and its native representation. The languages listed are Arabic, Chinese - China, Chinese - Taiwan, Dutch, English (selected with a blue checkmark), French, German, Italian, and Japanese. At the bottom of the form are two buttons: 'Apply' and 'Cancel'.

Language	Native Representation
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

Step 2: Select the another language in the list. The currently selected language will be marked with the icon ✓.

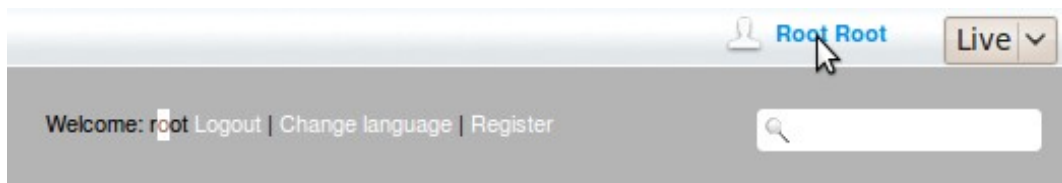
Step 3: Click **Apply** to change the display language temporarily, and wait few seconds to take effect, or click **Cancel** to quit without any changes.

3.1.7 Change the account information

The function allows changing your account information.

Do as follows:

Click directly on your own account name to open the **Account Profiles** tab which enables you to change your account profile or password.



The Account Profiles tab will appear:

A screenshot of the 'Account Profiles' tab in the eXo interface. The tab is titled 'Account Profiles' and 'Change Password'. It contains four input fields: 'User Name' with the value 'root', 'First Name' with 'Root', 'Last Name' with 'Root', and 'Email' with 'root@localhost'. Below these fields are 'Save' and 'Reset' buttons. At the bottom of the form is a 'Close' button.

Illustration 5: The Account Profiles tab

- ✓ To change your Account Profiles, do as follows:

Step 1: Select the **Account Profiles** tab.

This tab displays the current basic information of the user who has logged at the time.

Step 2: Change your **First Name**, **Last Name**, **Email**. You cannot change your **User Name**.

Step 3: Click **Save** to accept changes.

- ✓ To change your Password, do as follows:

Step 1: Select the **Change Password** tab.

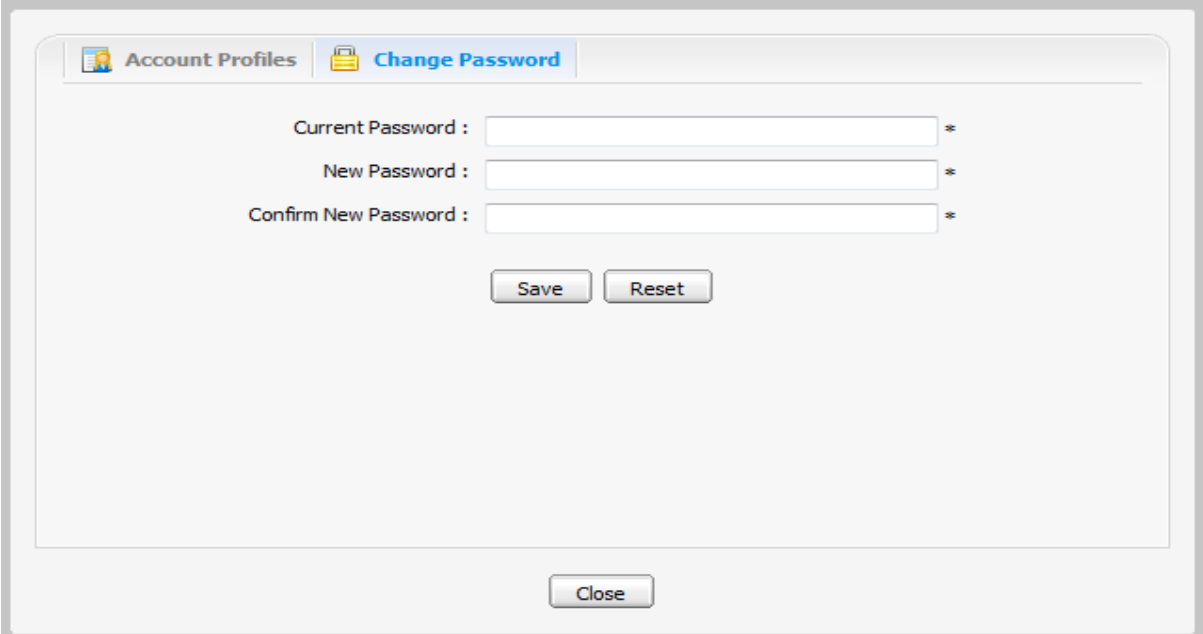
The screenshot shows a web application window with two tabs: 'Account Profiles' and 'Change Password'. The 'Change Password' tab is active. It contains three input fields: 'Current Password', 'New Password', and 'Confirm New Password'. Each field has a small eye icon to its right for toggling visibility. Below the fields are two buttons: 'Save' and 'Reset'. At the bottom center of the window is a 'Close' button.

Illustration 6: The Password Changing form

Step 2: Input your current password to identify that you are the owner of this account.

Step 3: Input your new password, it must have at least 6 characters.

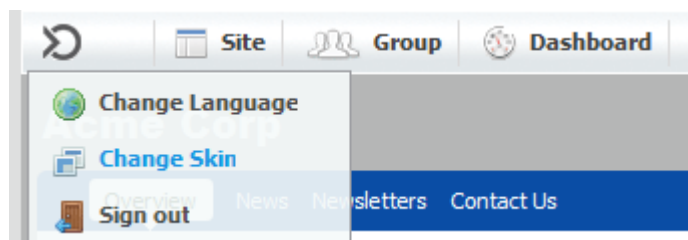
Step 4: Input your password again in the **Confirm New Password** field.

Step 5: Click **Save** to accept changes.

3.1.8 Change the skin of the current site

The eXo skins are attractive user interface styles for displaying a portal. Each skin has its own characteristics with different backgrounds, icons, etc. In order to use easily and effectively, you are allowed to change the skin of the current site.

Step 1: Select the **Change Skin** item in the menu that appears when you move the cursor to the logo at the upper left corner:



The **Skin Setting** form appears:

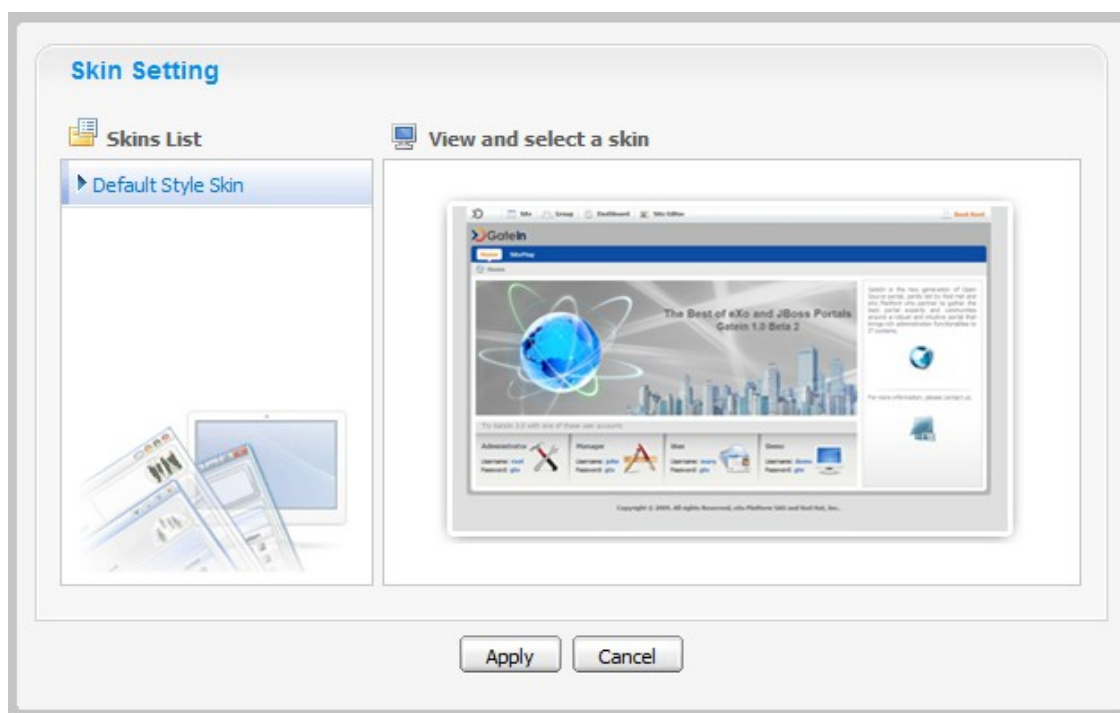


Illustration 7: The Skin Setting form

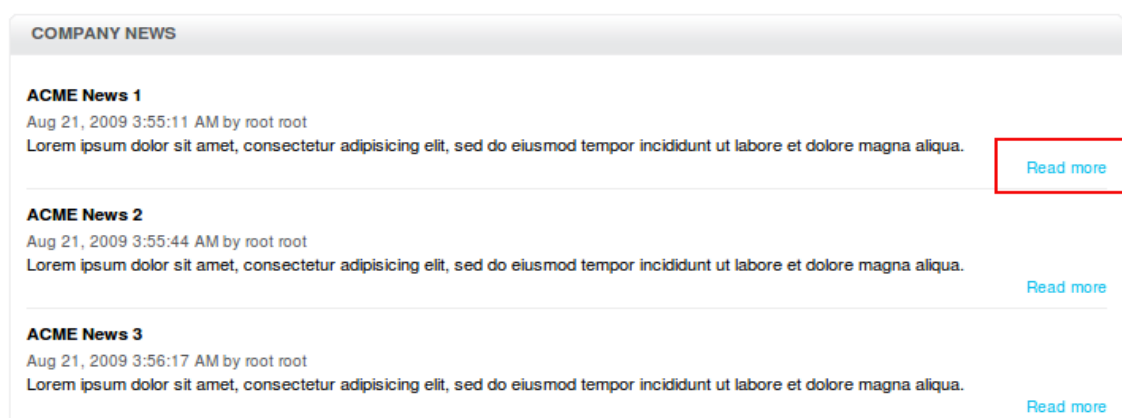
Step 2: Select the skin you want by clicking its name.

Step 3: Click **Apply** and wait a few seconds to take affect.

3.1.9 Print a web content

Users can easily print any content in a site by following these steps:

Step 1: Click **Read more** to read all the content of a document or an article in a site.



Step 2: Click the **Print** button, the Print Preview page will be displayed on another tab.



Step 3: Click the **Print** button to print the content of this page or **Close** to close this tab without printing.

3.2 Set up a website

In DMS, we use the 'Website' term equally to the 'Portal' term. It means that creating a new portal is creating a new website. Thus, you can also edit, delete, view a website as a portal. Besides, DMS also supports webmasters/ administrators to manage websites better.

3.2.1 Create a new site

This function allows you to create a site (portal) to meet your own needs.

Do the as follows:

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

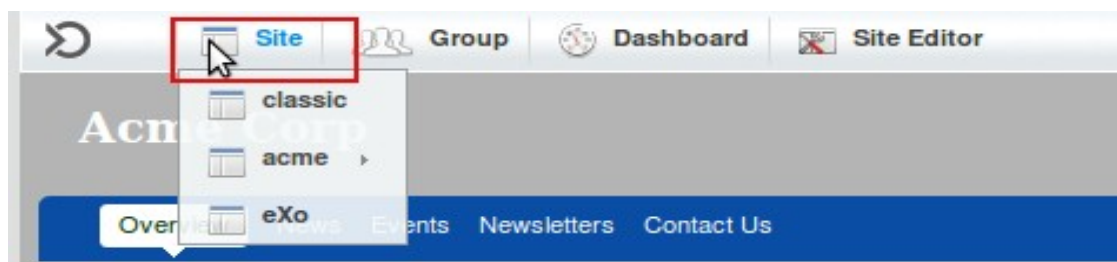


Illustration 8: The administration bar

Step 2: A list of existing portals will be listed. Click the **Add New Portal** button to open the **Add new portal** form:

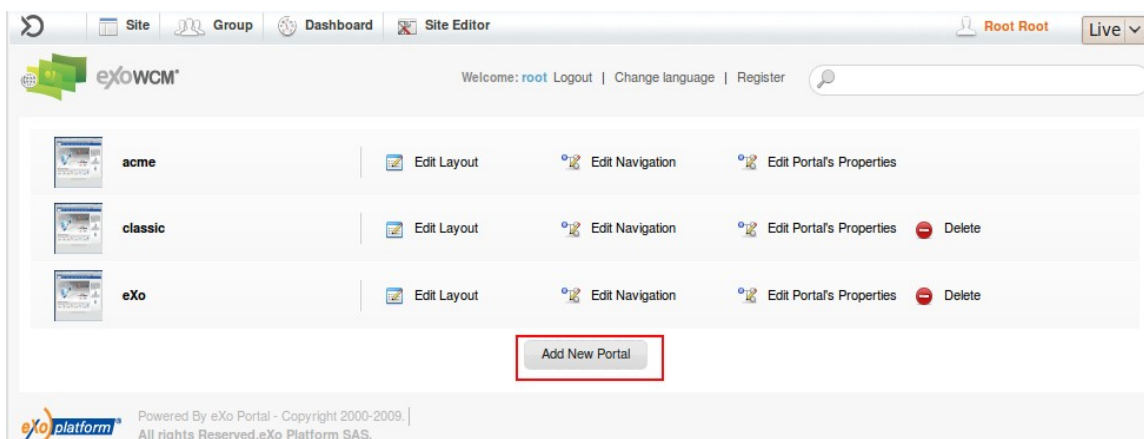


Illustration 9: The list of the current portals

The add new portal form appears:

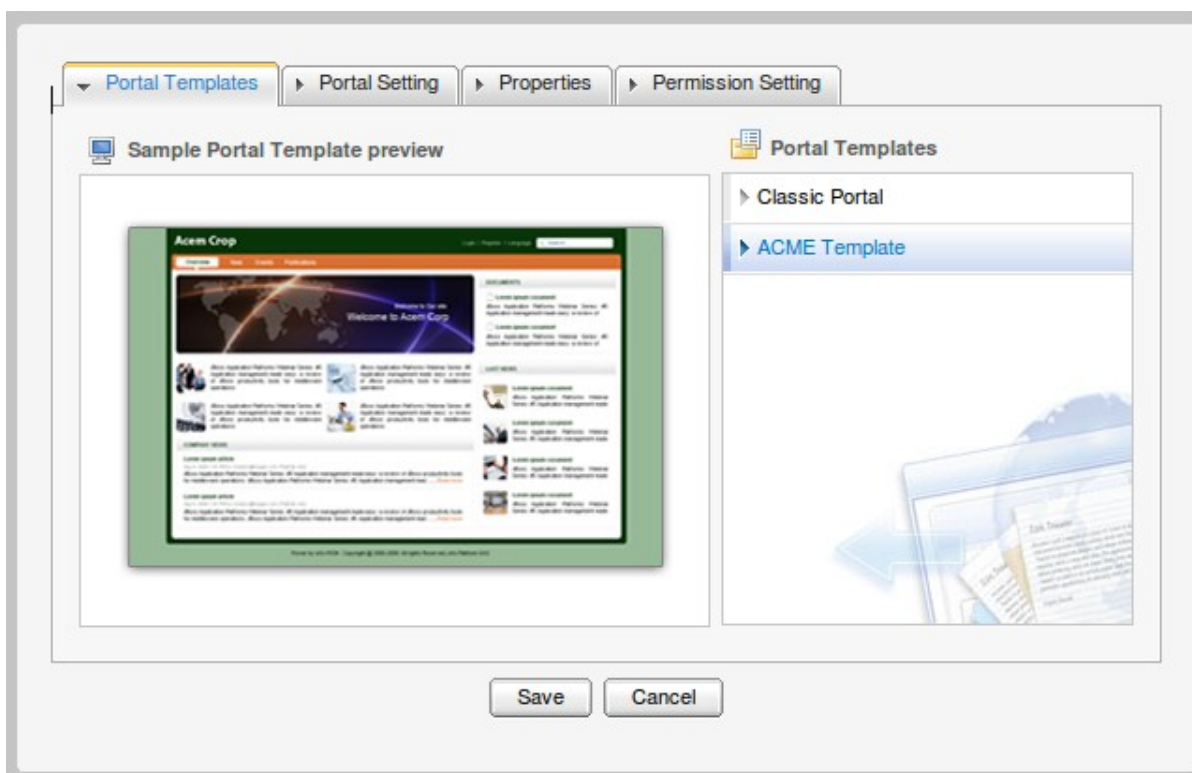
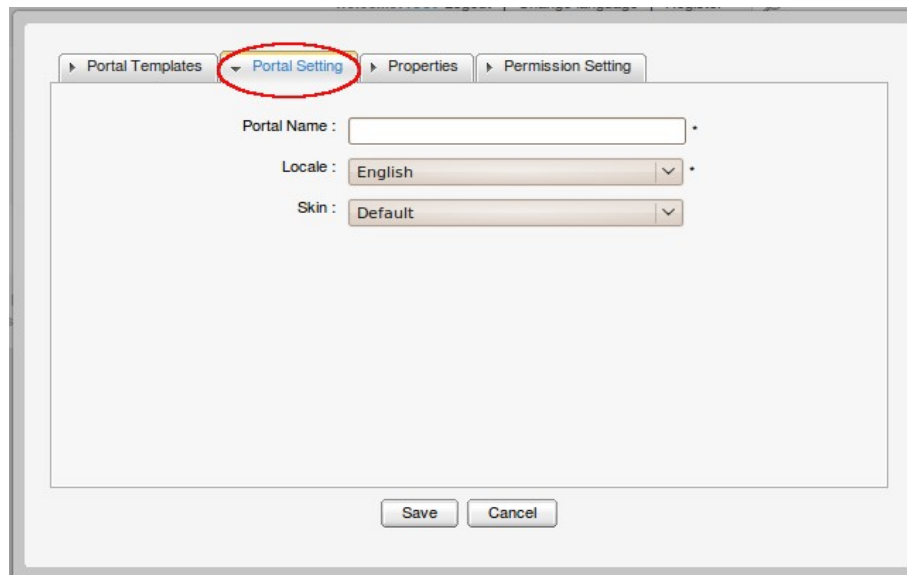


Illustration 10: The Add new Portal form

Step 3: In the Portal Template tab, select **Classic Portal** or **ACME Template** for the new portal.

Step 4: Click the **Portal Setting** tab to set some properties for this site:



Details:

(*): required

Portal name	The name of the portal. This field is required and must be unique. Only alphabet, numbers and underscore characters are allowed. The Portal name must be at least 3 characters
Locale	The interface language of the portal. This field is required
Skin	The skin of the portal

Step 5: Keep session alive by clicking the **Properties** tab.

The **Keep session alive** option means keeping the working session for a long time to avoid the working time out. There are 3 options:

- never: it never happens even if the application requests
- on demand: it starts to be used as soon as the application requests
- always: it's always enabled (which has a cost but the administrator will be aware of that)

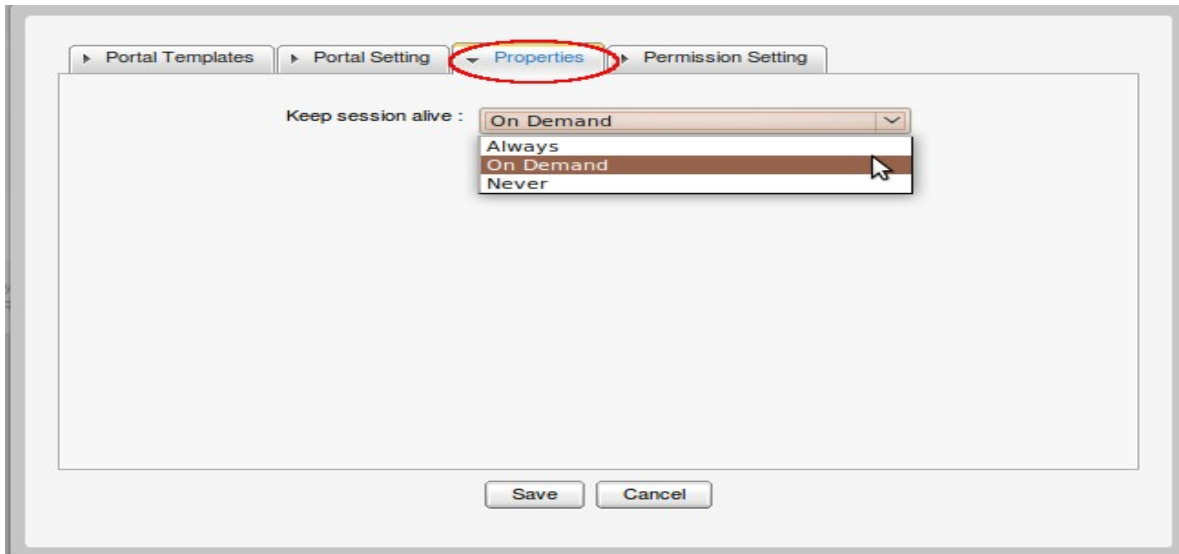
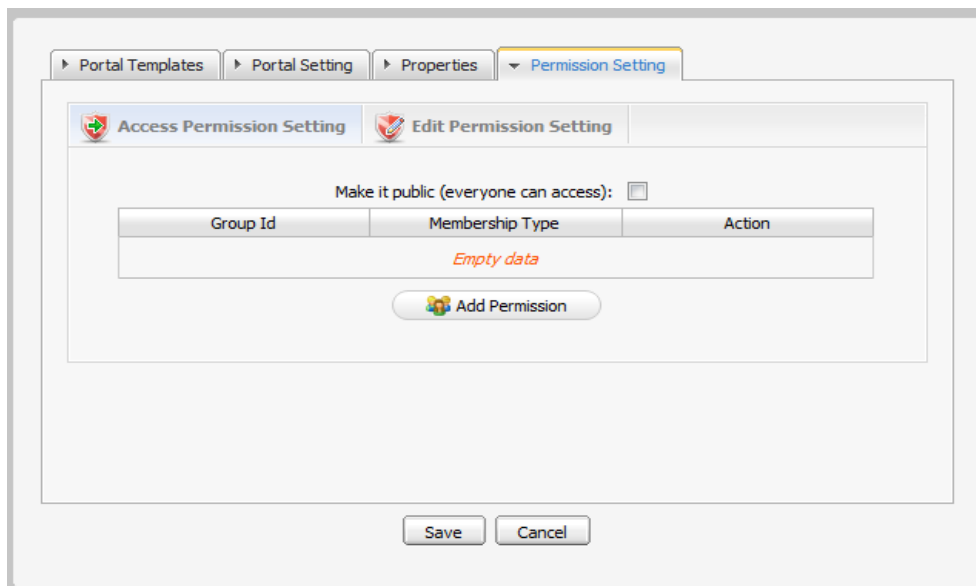


Illustration 11: The Properties tab in the Add new Portal form

Step 6: Set access and edit permission for this portal by clicking the **Permission Setting** tab.

The **Permission Setting** tab includes two subtabs: **Access Permission Setting** and **Edit Permission Setting**.

- The **Access Permission Setting** tab: By default, the access permission list of the portal is empty:



You can assign the access permission to everyone by checking the **Make it public** check box, or clicking the **Add Permission** button to assign the access permission to a specific group which is selected from the **Select Permissions** form (By

selecting a group on the left and a corresponding membership on the right):

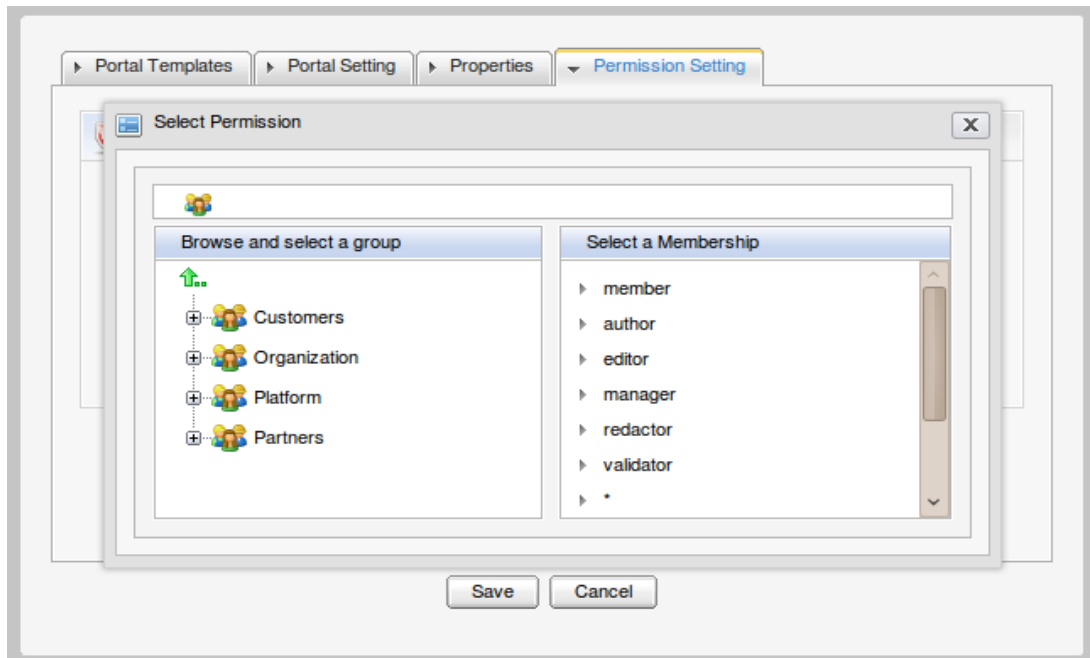


Illustration 12: The Select Permission form

After selecting groups, the access permission list is displayed:

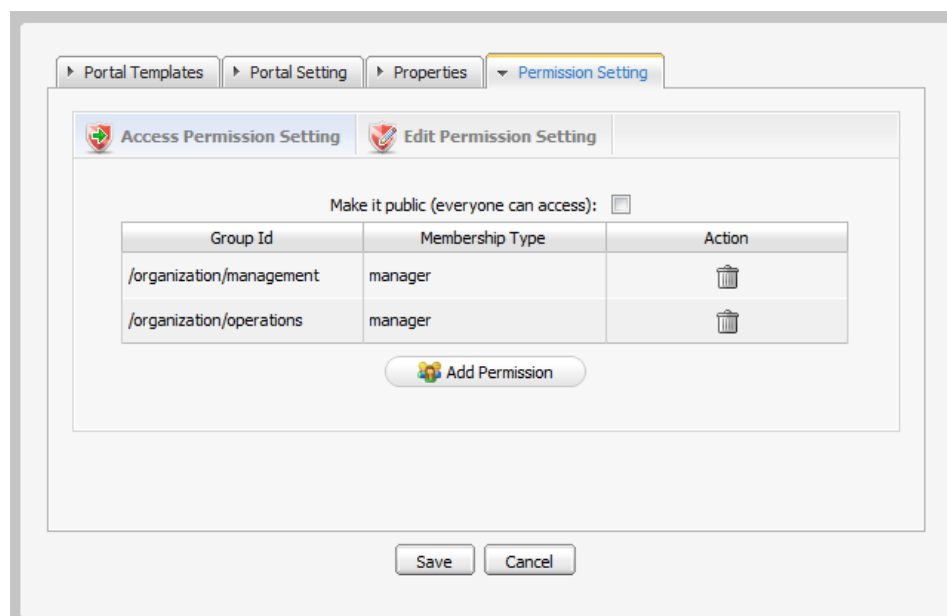


Illustration 13: The Access Permission list in the Permission Setting tab

In which, the icon is to remove its corresponding group from the Access

Permission list.

- The **Edit Permission Setting** tab: By default, it is also empty and you have to assign the edit permission to a specific group.

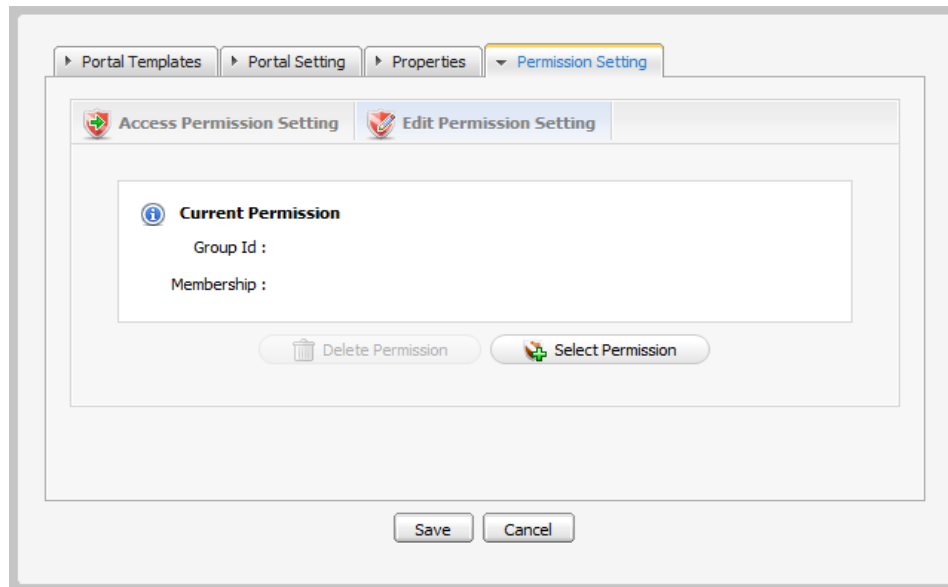


Illustration 14: The Edit Permission Setting tab

You can assign the edit permission to a group with a specific membership by clicking the **Select Permission** button in the **Edit Permission Setting** tab to open the **Permission Selector** form. Select a group on the left panel and a corresponding membership on the right panel:

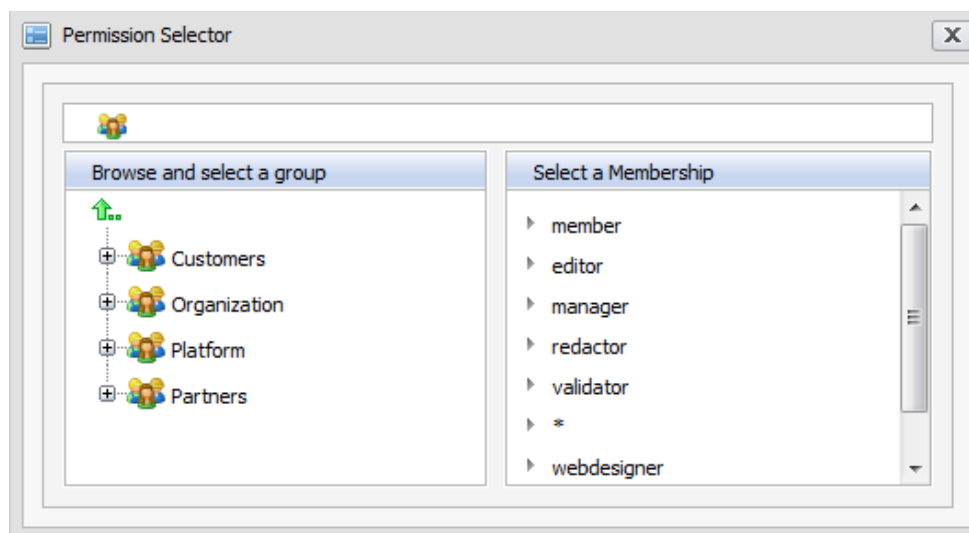


Illustration 15: Permission Selector form

The (*) from the Select a Membership panel means that you assign the right for

everyone in the selected group from left panel.

After selecting a group, the **Current Permission** will be displayed with detailed information:

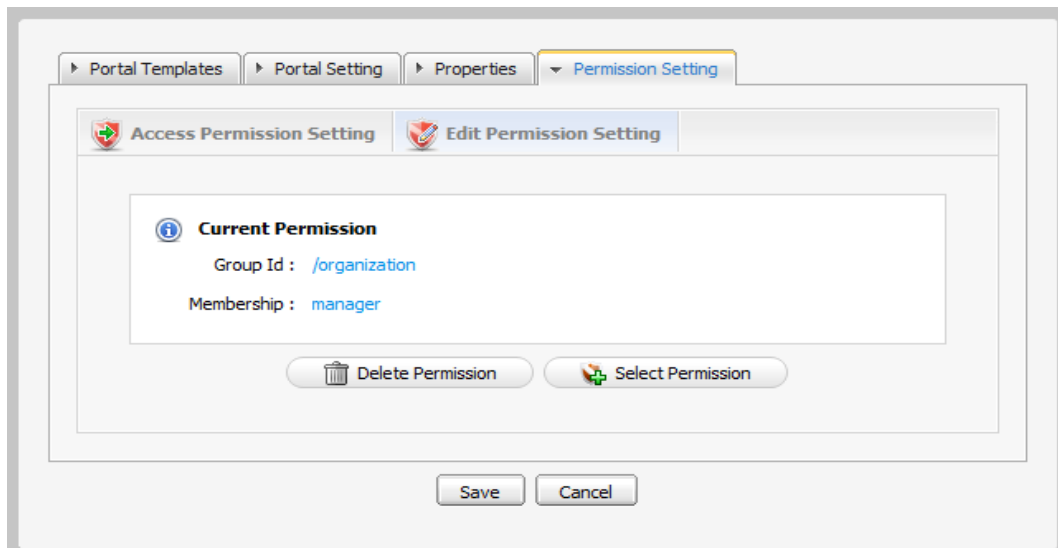


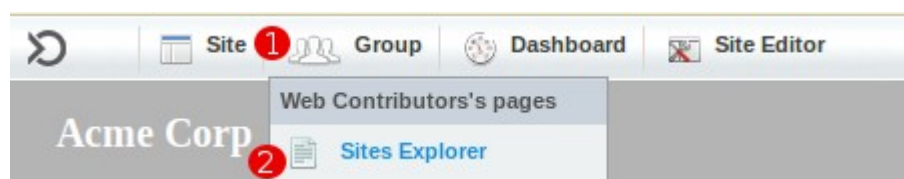
Illustration 16: The Current Permission with the detailed information

The edit permission is assigned for only one group at one time. You can click the **Delete Permission** button to remove the current edit permission of the selected group or re-assign the edit permission to the another group by re-clicking the **Select Permission** button and select another group.

Step 7: Click **Save** to accept creating a new portal.

After creating a new site, a list of the existing sites will be displayed on the screen. This new site will be added in the exiting sites in **Site** on the administration bar and concurrently in a drive that includes all its default files.

To see it in the drive, click **Group | Sites Explorer | Drive** on the administrator bar.



For example, after creating a portal named 'eXo', there is a drive named 'eXo' in Sites Explorer:

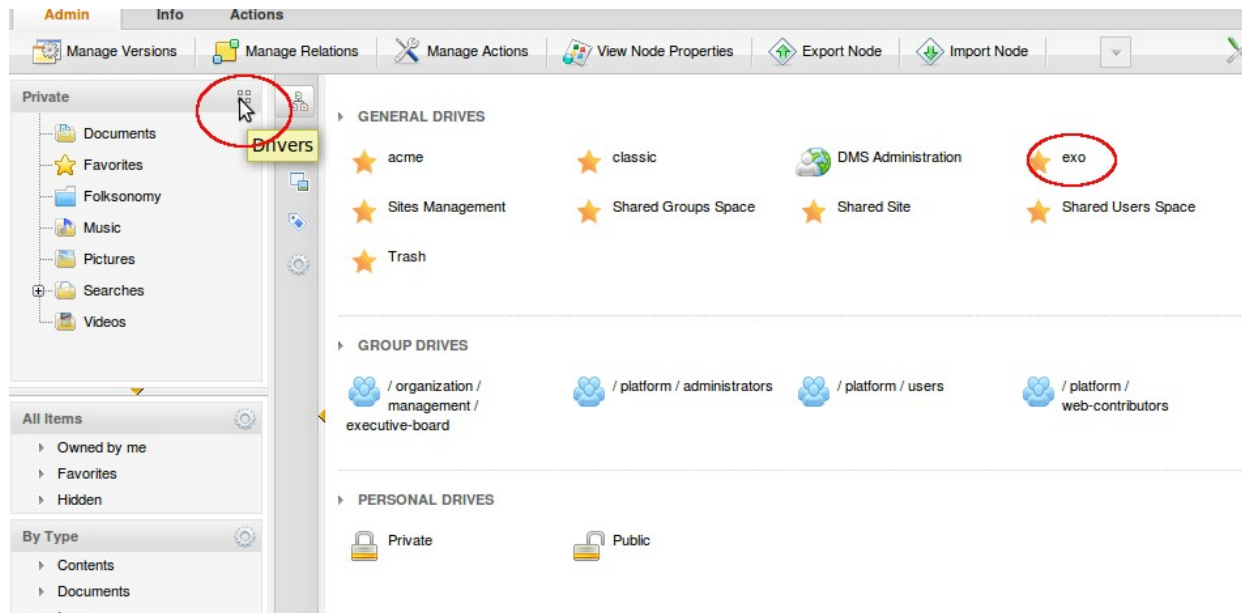


Illustration 17: Drives in Sites Explorer page

3.2.2 Edit a site

This function helps you edit a site (portal). In addition to editing properties (setting, access/edit permission) of a site like a portal, you also may edit the layout components of that site.

You have two modes:

- *View mode*: in this mode, you only can view the current portal (site) without editing the layout components of the site. When you sign in, by default, the mode of your site will be the view mode. This mode is the 'off' status of the edit mode.
- *Edit mode*: in this mode, you are either view or edit layout components of the current portal.

3.2.2.1 Turn on the edit mode of the site

After signing in, you will see two statuses (Live/Edit) of the edit mode on the Administration bar. By default, the status is 'Live'. It means that you only view the current site without editing the layout component of the site:

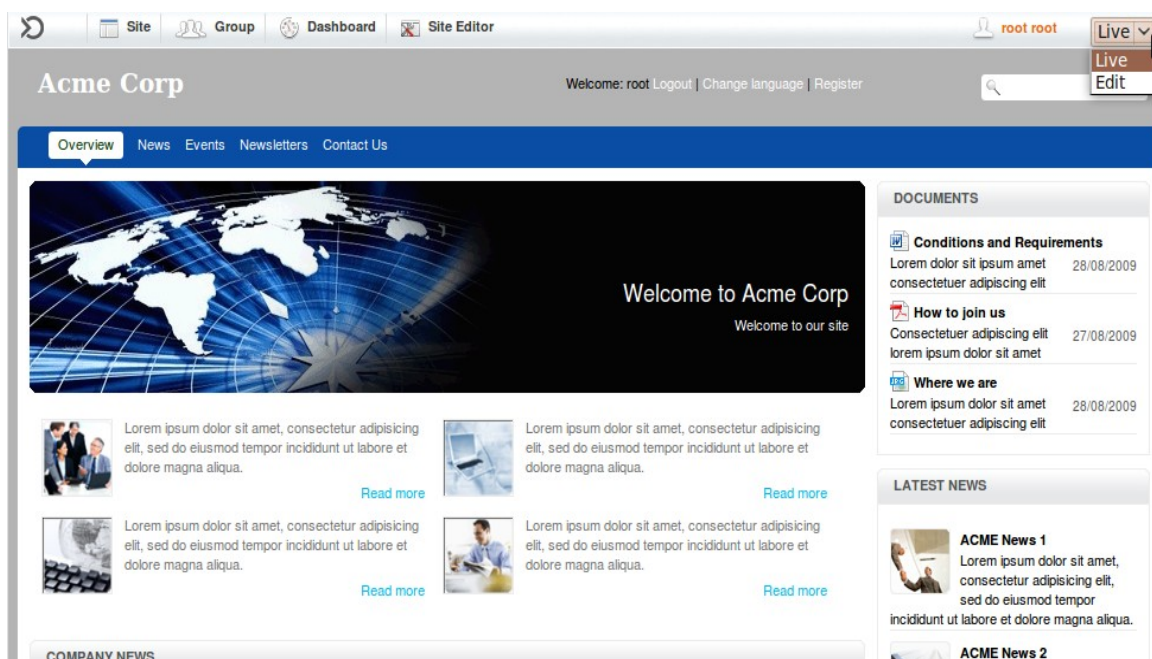

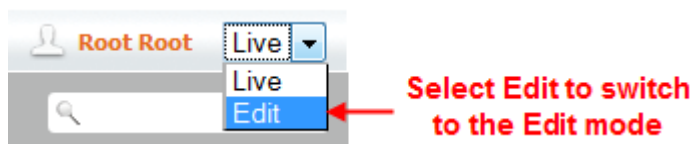


Illustration 18: The Site In Live Status

To switch between two statuses “Live” and “Edit”, just click  on the corner to open the status list and select the mode you want:



When your site is switched to the **edit** mode you are able to directly edit any components of your site:

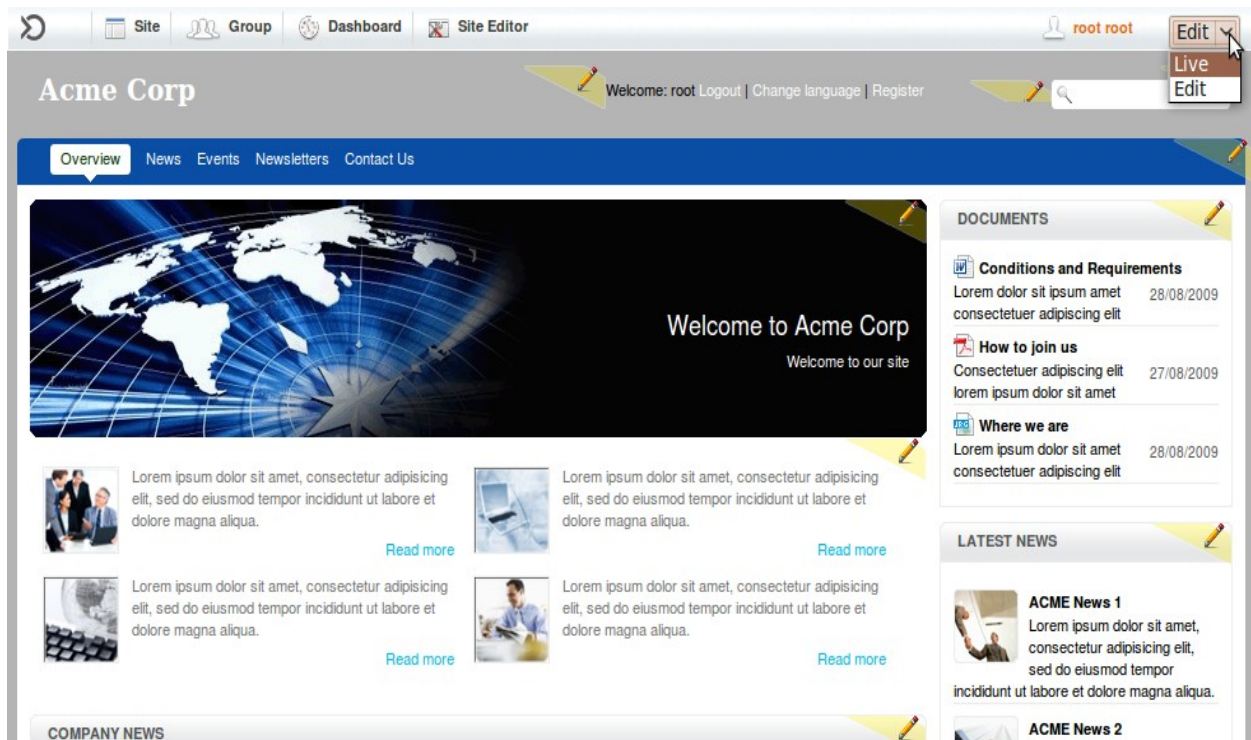


Illustration 19: The site in Edit status

3.2.2.2 The structure of a site interface

The interface of a site can be divided into five parts like the illustration below and each part is a single content viewer so that it also includes all default elements of a web content.

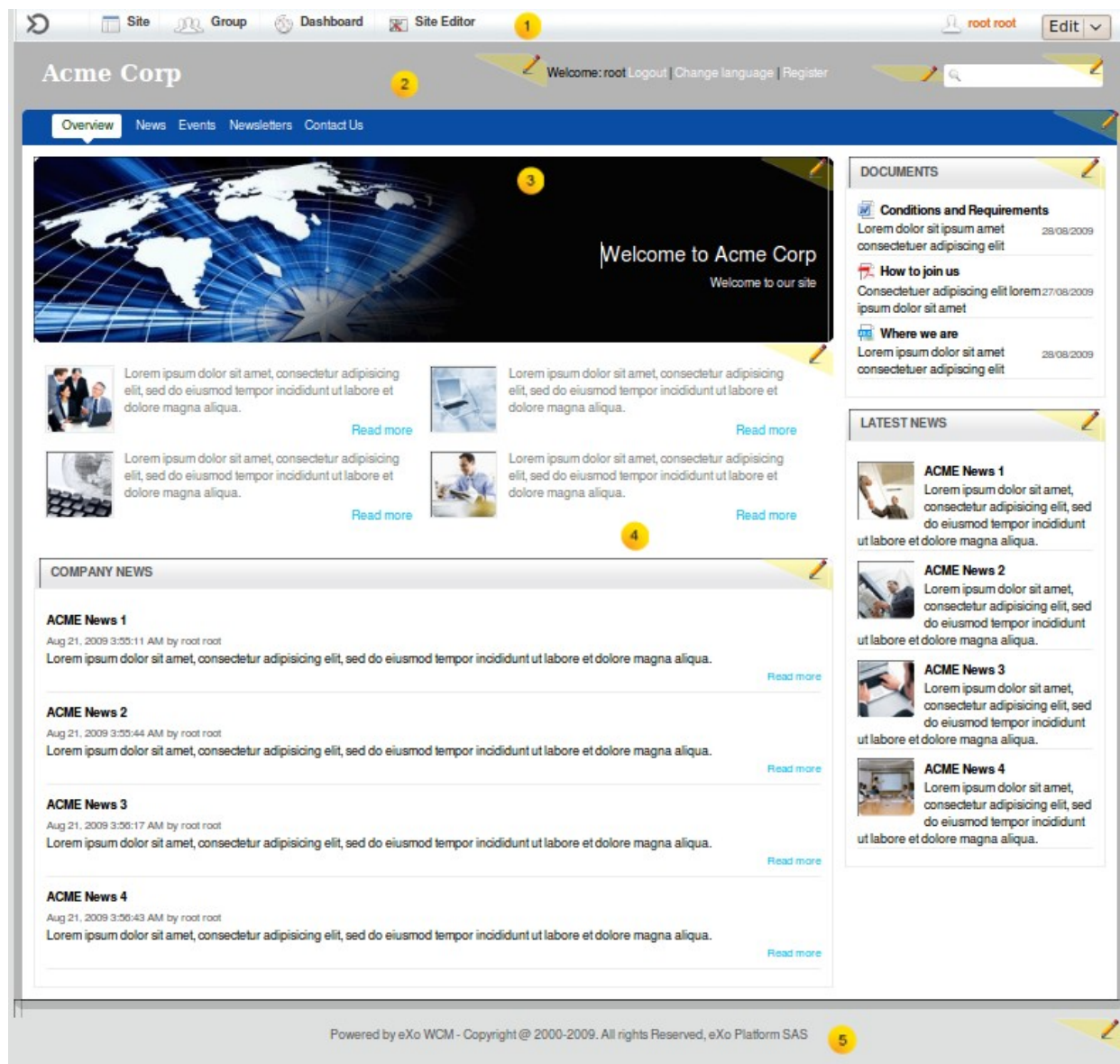


Illustration 20: The Interface of the portal

Detail:


Indicator	Meaning
1	This is Administration bar which contains some administration functions related to portals (websites).
2	This is Banner which contains organization's slogan, logo, icon used in websites.

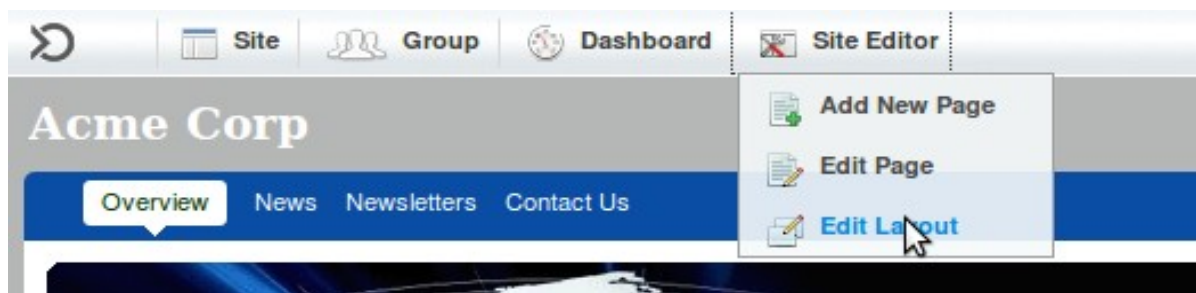
3	This is Navigation bar that helps the website' s users to visualize the structure of website and provide quick links to different pages.
4	This is the page content area to display the content of current selecting page.
5	This is Footer of the website. It can be texts, an image that is displayed at the bottom of the website. It provides information about author/institutional sponsor, revision date, copyright, and more.

3.2.2.3 How to edit a site?

- ✓ To edit a site, do the following steps:

a) Edit the properties of the Website:

Step 1: Show the form to edit the current site by clicking **Site Editor** on the administration bar, then select  **Edit Layout** .



Step 2: The form to edit the current portal will appear.

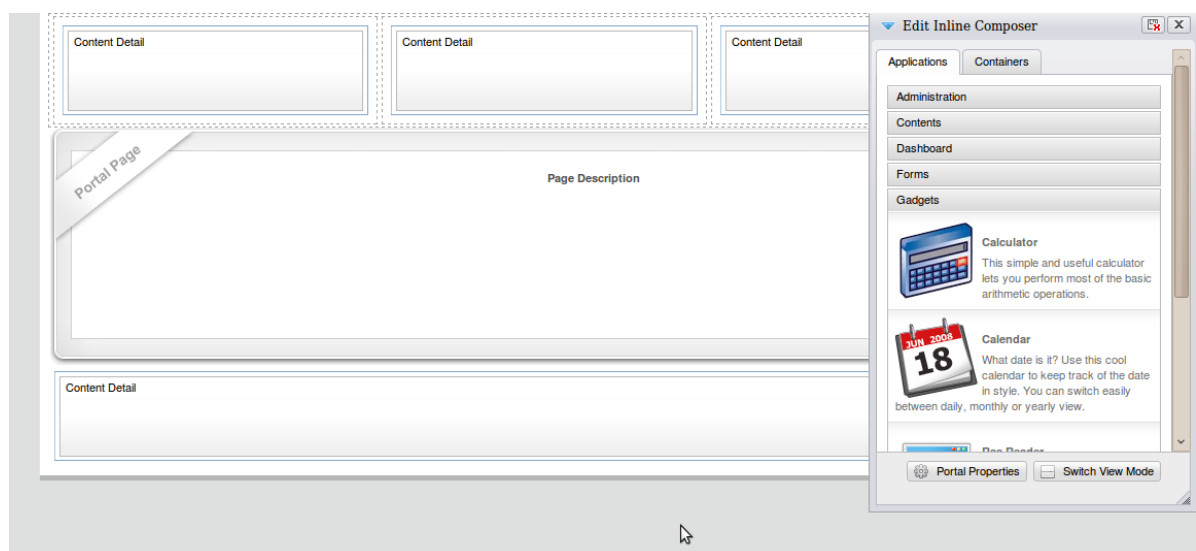






Illustration 21: The Edit Portal Form

To edit the properties of the current portal, use one of icons below:

Indicator	Meaning
 Portal Properties	Portal Properties: allows editing the portal's properties
 Switch View Mode	Switch View Mode: allows turning on the view mode
	Finish: allows saving all changes and escaping the Edit page
	Abort: allows canceling all changes that have not been saved and quitting the Edit page

b) The layout of Edit Website:

You can only edit a banner, a navigation bar, a breadcrumb bar, a homepage and a footer of a website.


Edit banner

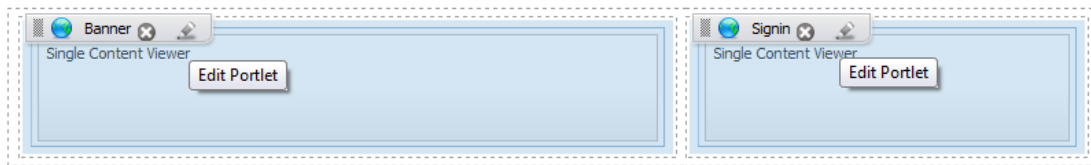
In **WCM**, the banner is divided into two parts: a left banner and a right banner. You can edit both of them.

Step 1: Show the form to edit a banner by following steps:

The 1st way: Switch on the Edit Status on the homepage like illustration 21 and click the edit button on the homepage as this illustration below:



The 2nd way: Click the edit  icon at the right corner of the **classic - banner** portlet (for the left banner) or **classic- access** portlet (for the right banner) in the **Edit Portal** form.



A form to edit the current banner will appear:

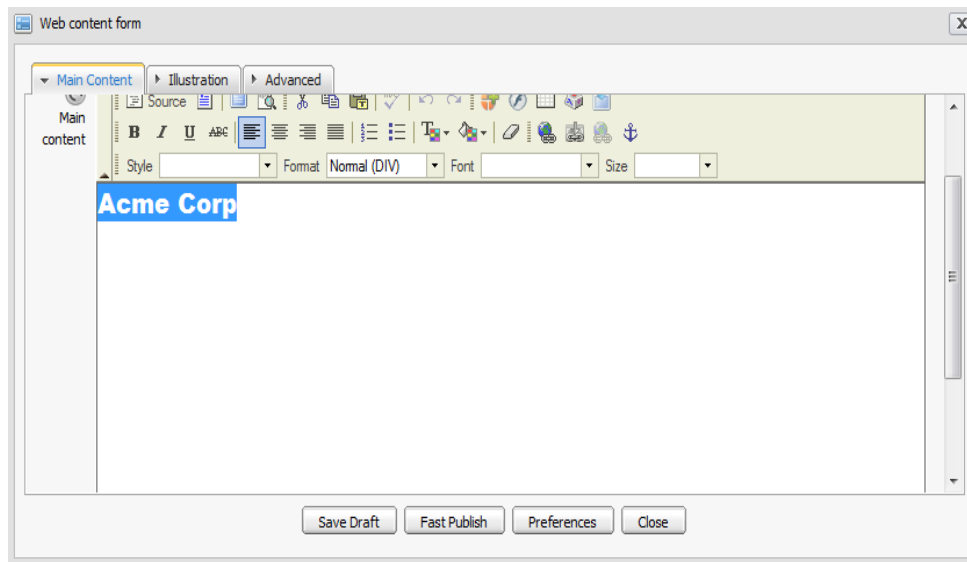


Illustration 22: Edit left Banner

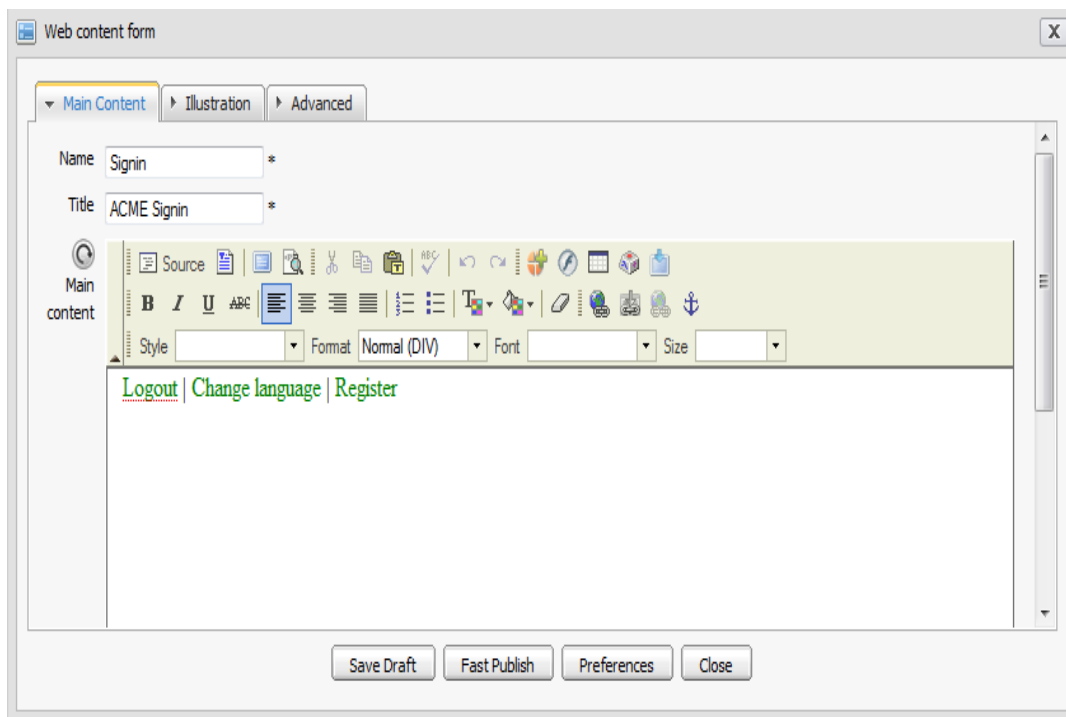


Illustration 23: Edit right banner

Details:

The **Main Content** tab includes:

Name	The default name of the banner. You can not change this value.
Title	The title of the banner. This field is required.
Main Content	The main displaying content of the banner.
Save Draft	Allow to save the current content as draft.
Fast Publish	Allow to publish immediately.
Preference	Allow to set some property for the web content.
Close	Close this form.

Step 2: Change values in the **Main Content** tab of the edit banner form to edit the web site's banner.

Step 3: Complete editing the site's banner and publish the content on the banner by clicking the **Fast Publish** button.

Step 4: If you just want to save the edited content as a draft, click **Save Draft**.

Step 5: To set some properties for the current content, click the **Preferences** button. The **Setting** form will appear as you can see below. Change the information in this form and then click **Save** to save settings.

Permission	Accessible	Editable	Action
root	true	true	
*/platform/administrators	true	true	
*/platform/web-contributors	true	true	
any	true	false	

Permission


Access Right ☐

Edit Right ☐

- The **Permission manager** tab is used to set the edit and access permission for this

content:

By default, when creating a new web content, all users can access but only 'root' and users of */platform/administrators group can edit the web content. In addition, you also can change these permission by doing as follows:

- 5.1** Edit the current permission of a group/user in the Permission table by clicking the edit icon  corresponding to that group/user. Then change the current permission by checking check boxes in the edit form below:





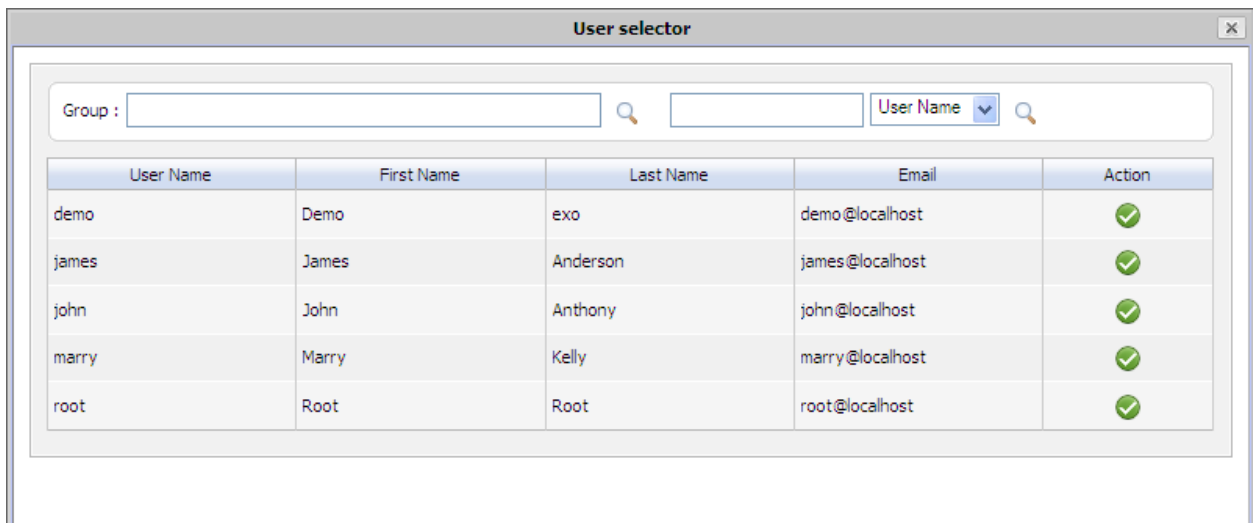
Permission 

Access Right ☐



Edit Right ☐

- 5.2** Or you can add new groups into the Permission table:

Select the icon  if you want to set permission for a user: The User selector form will appear like illustration 25. Select a user in the list by clicking the icon .



User selector

Group :  User Name 







User Name	First Name	Last Name	Email	Action
demo	Demo	exo	demo@localhost	
james	James	Anderson	james@localhost	
john	John	Anthony	john@localhost	
marry	Marry	Kelly	marry@localhost	
root	Root	Root	root@localhost	

Illustration 24: The User selector form

Select the icon  if you want to set permission for a group: Group selector form will appear like the below illustration. Select a group on the left and then select one corresponding membership on the right.

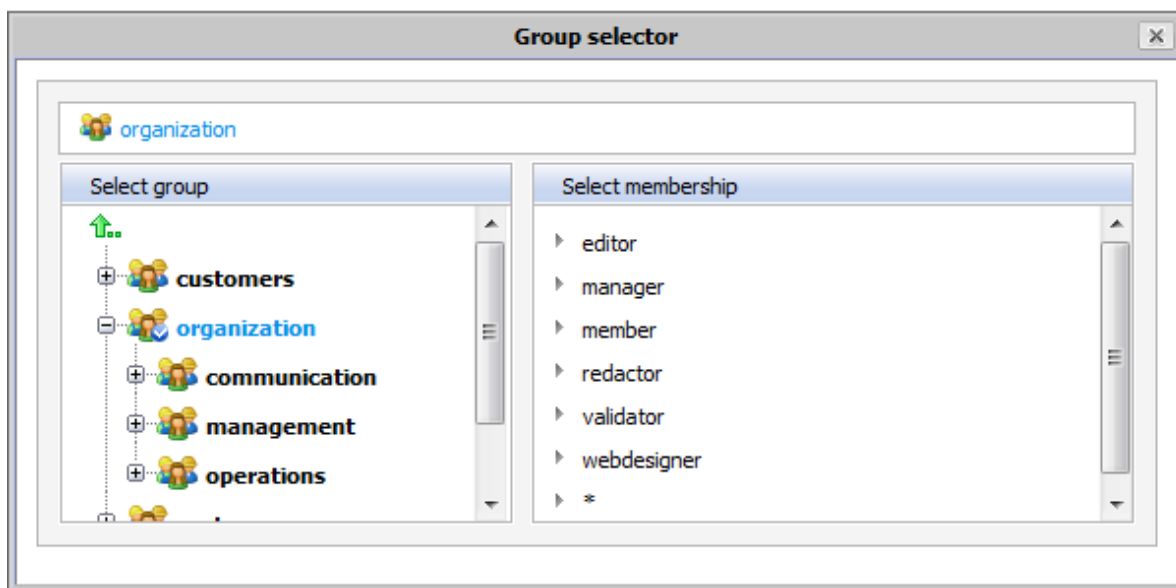


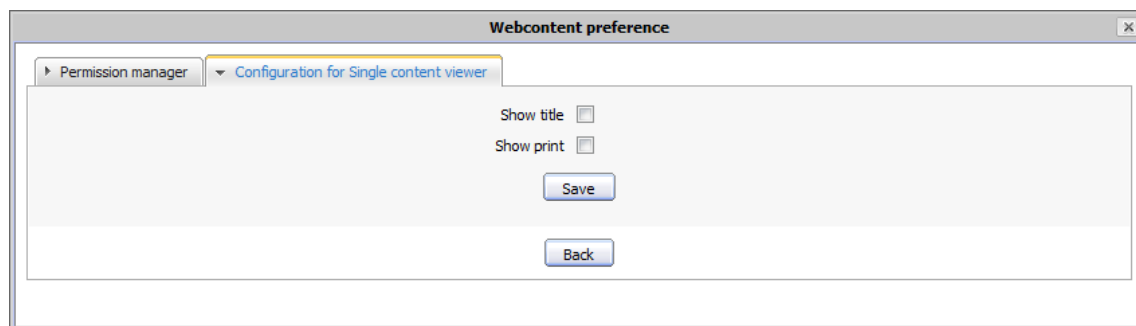
Illustration 25: The Group selector form

Select the icon  if you want to set permission for all users.

After selecting users/groups, set permission for these users/groups by checking the Access Right check box (for only the access right) or the Edit Right check box (for only the edit right) or checking both check boxes if you want.

5.3 Accept and save permissions by clicking **Save**.

■ The **Configuration for Single content viewer** tab includes:



Details:

Show title	The option is whether to show the title of this content or not
Show print	The option is whether to show the print function or not

The **Illustration** tab in the **Web Content form**:

The screenshot shows the 'Web content form' window with the 'Illustration' tab selected. The tab contains a lightbulb icon and a text box with instructions: 'In this panel, you can specify an image that will be shown when your web content is displayed in lists. In addition, you can specify some summary text to come with this image.' Below this, there are three sections: 'Illustration Image' with a dropdown menu showing 'image/gif', 'Image Type' with a dropdown menu, and 'Summary' with a rich text editor. The rich text editor has a toolbar with various icons for text formatting (bold, italic, underline, link, unlink, list, indent, outdent, align, justify, text color, background color, font size, font family, text style) and a 'Source' button. At the bottom of the form are four buttons: 'Save Draft', 'Fast Publish', 'Preferences', and 'Close'.

Illustration 26: The Illustration tab in the Web content form

Details:

Illustration Image	The path to an image that you want to upload into the site. This image will be used like an illustration of that site.
Image Type	The image format that you want to upload to the site. The image file format can be gif, png, jpg or jpeg.
Summary	You can give a short description about the web content because it will be displayed with illustration image when the web content is listed. The main content will be show when it is selected to be viewed.

To upload an image to the site:

- Browse an image list on your local computer by clicking the **Browse...** button and then select a specific location.
- Select an image in the list to upload.
- The **Advanced** tab:
this tab includes two parts: CSS data and JS data:

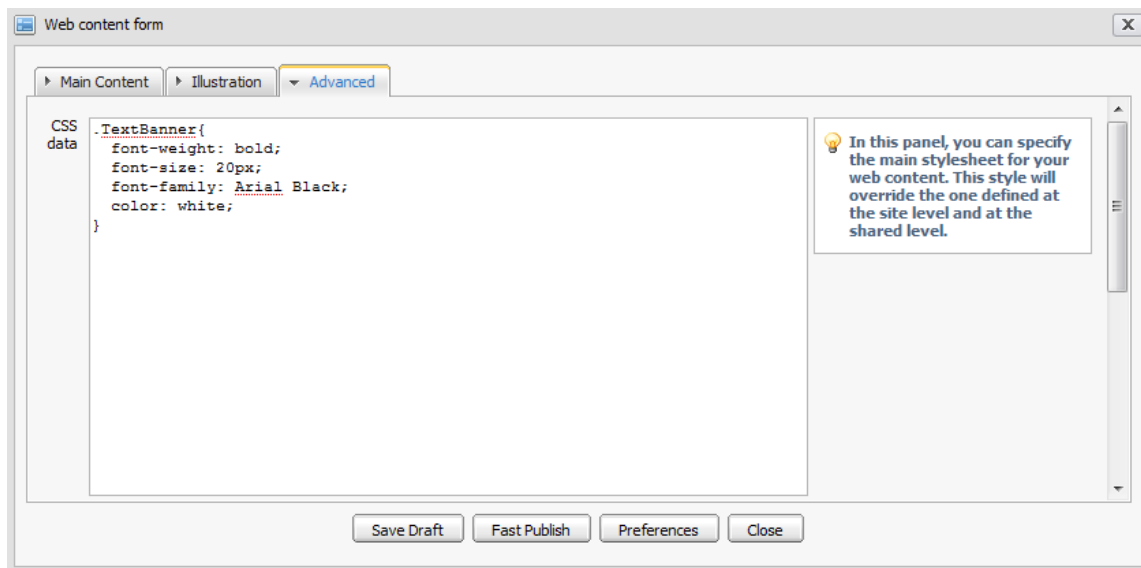


Illustration 27: The Advanced tab in the Web content form


CSS data: contains CSS definition to present data in a web content. You can optionally enter CSS data into this field to specify the style.

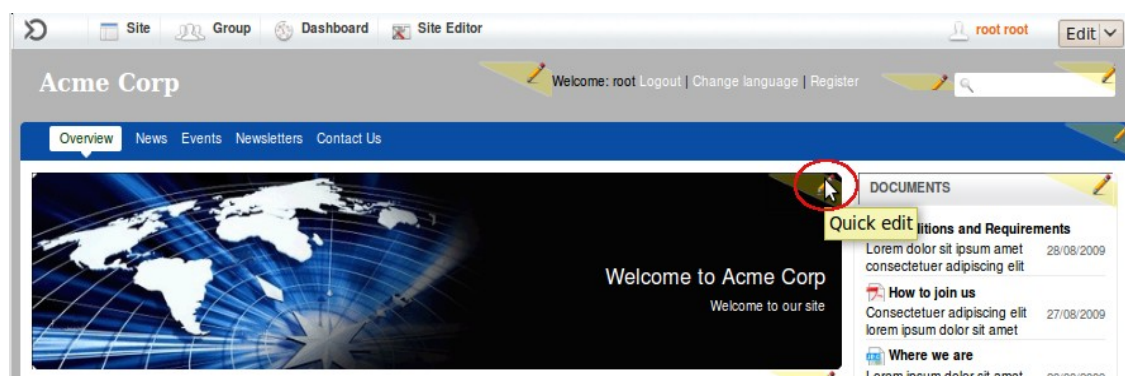
JS data: It contains JS content to make the web content dynamically when being published. You can optionally enter JS content in this field.

Edit homepage

WCM helps you edit the main content displayed in the home page of a web site.

Do the following steps:

Step 1: Show a form to edit the home page by clicking the edit icon  at the right corner of the home page:



The Web content form allows you to edit the main content in the home page:

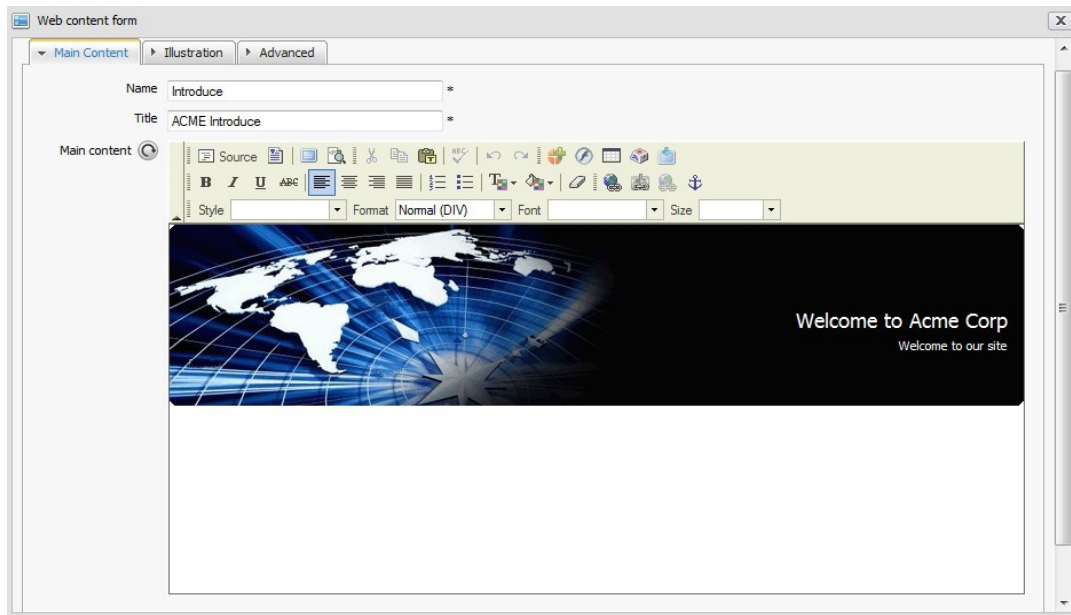


Illustration 28: The Edit homepage form in Single Content Viewer

Step 2: Change values in this form.

Step 3: Click the **Fast Publish** button to accept changes and publish them on the home page, or click the **Save Draft** button to save the edited content as a draft.

Step 4: To set more properties for this content, click the **Preference** button.


Edit footer

This function supports you to change the footer of the site.


Do the following steps:

Step 1: Show the form to edit the footer of the current site in two following ways:

The 1st way:

Step 1: Click the  icon at the right corner of the **footer** portlet in illustration 22. The form to edit the current footer will appear.

The 2nd way:

Click the edit icon  at the right corner of the site's footer.



The form to edit the current footer will appear:

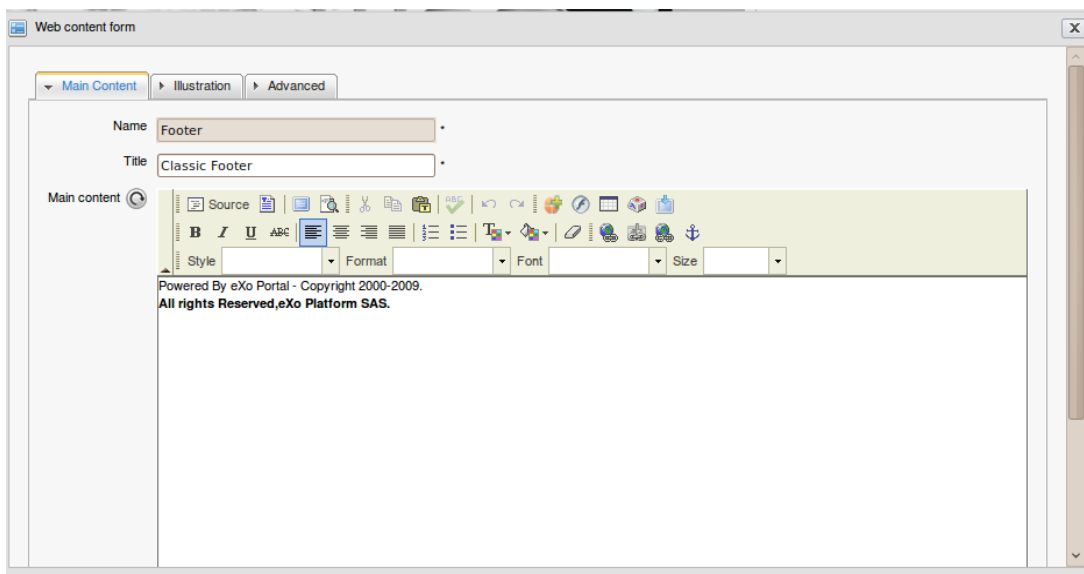


Illustration 29: The Foot Edit form in Web content form

Step 2: Change values of this form.

Step 3: Click the **Fast Publish** button to accept changes and publish them on the home page. Or click the **Save Draft** button to save the edited content as a draft.

Step 4: To set more properties for this content, click the **Preference** button.

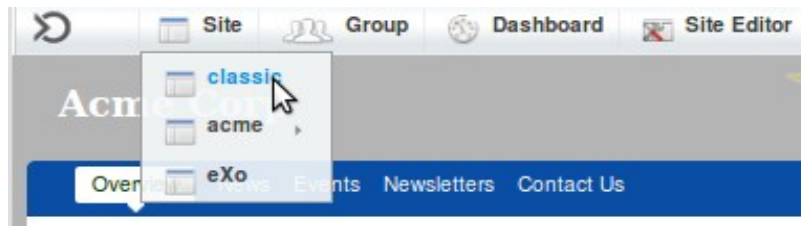


The Banner, Home page and Footer of a site are shared to others. Thus, all their changes will impact on the entire site. So you should copy the shared banner, home page and footer to a specific portal folder and refer to them when you need

3.2.3 Switch between sites

This function is used to change the current web site by another one.

Just select a site in the site list that appears when you move the cursor to **Sites** on the **Administration** bar:

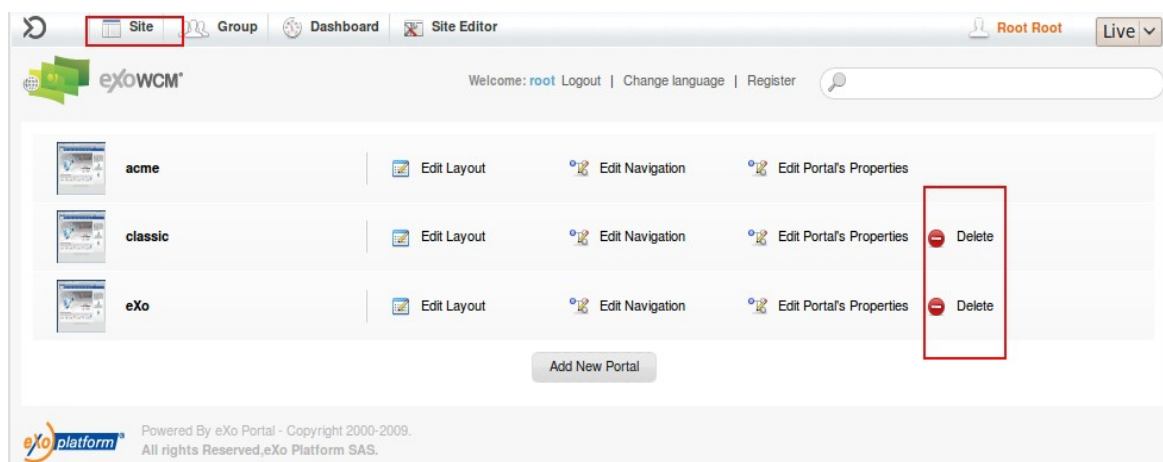


Your current site will be switched to the selected site.

3.2.4 Delete a site

This function is used to delete a portal (site) from the portal list.

Do the following steps:



Step 1: Show the portal list by clicking **Site** on the Administration bar:

Step 2: Click  **Delete** in the row of the portal that you want to delete.

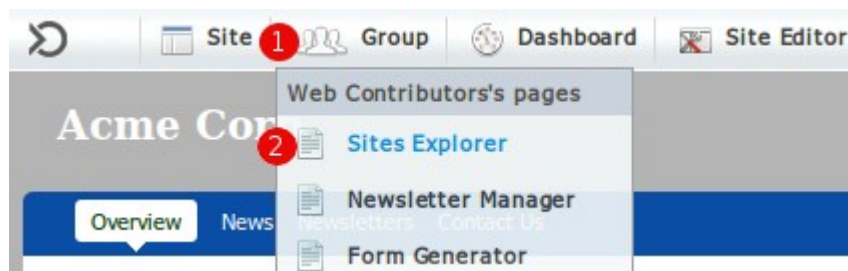
Step 3: Click **OK** in the confirmation message to accept deleting.

3.3 Manage The Site Content by Sites Explorer

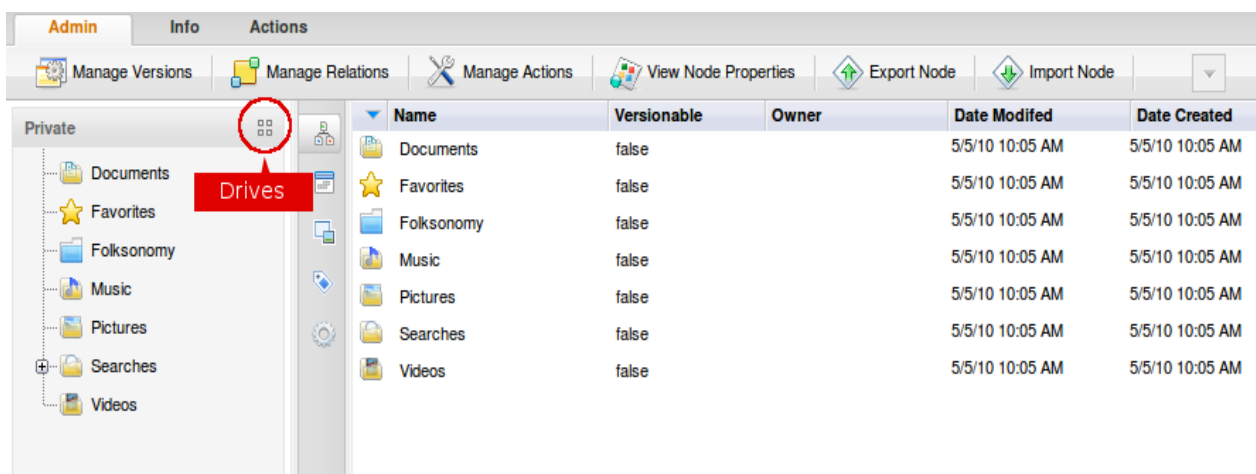
3.3.1 Access Sites Explorer

This page is used to manage all documents in different drives. This is really the flexible way because you can do through the Internet anytime and anywhere. By default, anyone can access Sites Explorer but the performing actions on Sites Explorer depending on the role of each user.

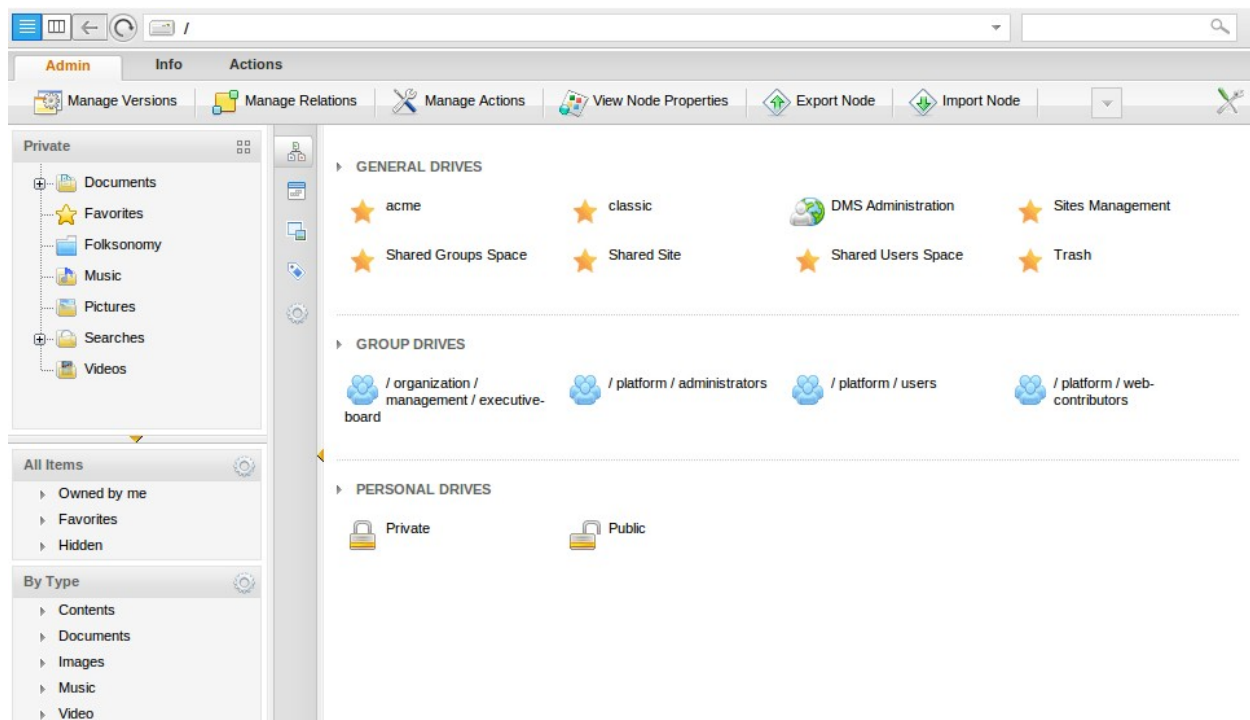
Go to the **Sites Explorer** on the administration bar:



By default, the **Private** drive will be displayed. To view all drives in Sites Explorer, click the icon:



There are some specific drives to choose to work on, they are organized in groups: Personal drives, Group drives and General drives.



Personal drives: Personal drive is the working space of a user. If you want to do in private, select the Private drive, no one else can access or get your private resources. If you want to create resource and share with others, work in the Public drive.

▶ PERSONAL DRIVES



Private

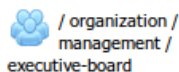


Public

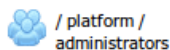
Group drives: The drive of a group is the working space of users in that group.

In this example, the user “root” joins in three groups : “executive-board”, “administrators” and “users” so he has right to access these group's drive.

▶ GROUP DRIVES



/ organization /
management /
executive-board



/ platform /
administrators



/ platform / users



/ platform /
web-contributors

General drives: This is the working space for everyone but your access right in different drives depends on your role. With default users, log in by “root” or “john” you can access any drive in General drives, but if you login by “marry” or “demo” you only can access Shared Users Space and Validation Request Document Center only.

3.3.2 Drives in Sites Explorer

3.3.2.1 Private drive

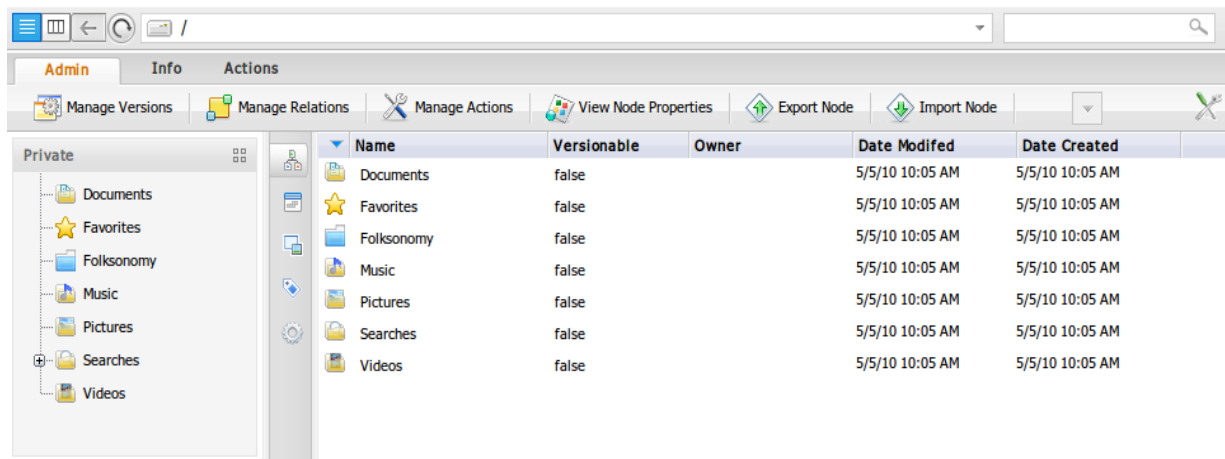
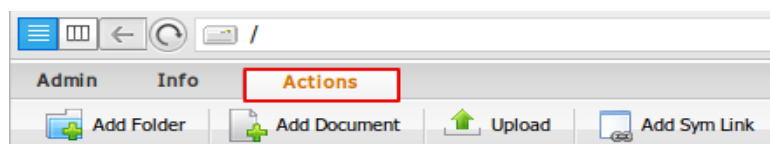


Illustration 30: The private drive

Private drive contains personal data of registered users. Hence, only these individuals can access data in this drive type.

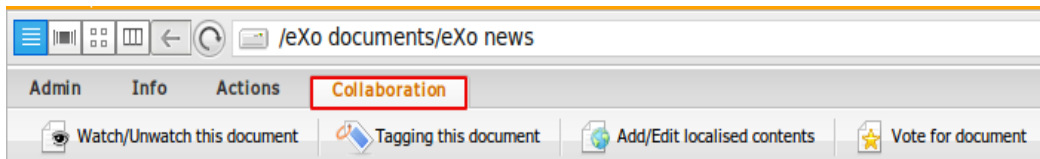
By default, there are some initialized folders to store private user's resources.

- ◆ By selecting the **Actions** tab, you can:



1. Create a new folder
2. Create a new document
3. Upload file from your computer
4. Add Sym Links
5. Overload Thumbnails

- ◆ By selecting the **Collaboration** tab, you can:



1. Watch/Unwatch a document .
 2. Add tags for a document.
 3. Set multi-display languages for document.
 4. Vote for a document.
 5. Comment for a document.
- ◆ By selecting the **Search** tab, you can:
1. Do the simple search
 2. Do the advanced search with more constraints, add new query to search
 3. Do search by existing queries.
- ◆ In addition, you can:
1. Setup your browsing preferences
 2. Cut/paste, Copy/past, Delete a node
 3. Lock a node
 4. Rename a node
 5. Use the view WebDAV function to view document content.
 6. Download documents (folders) to your machine.

3.3.2.2 Public drive

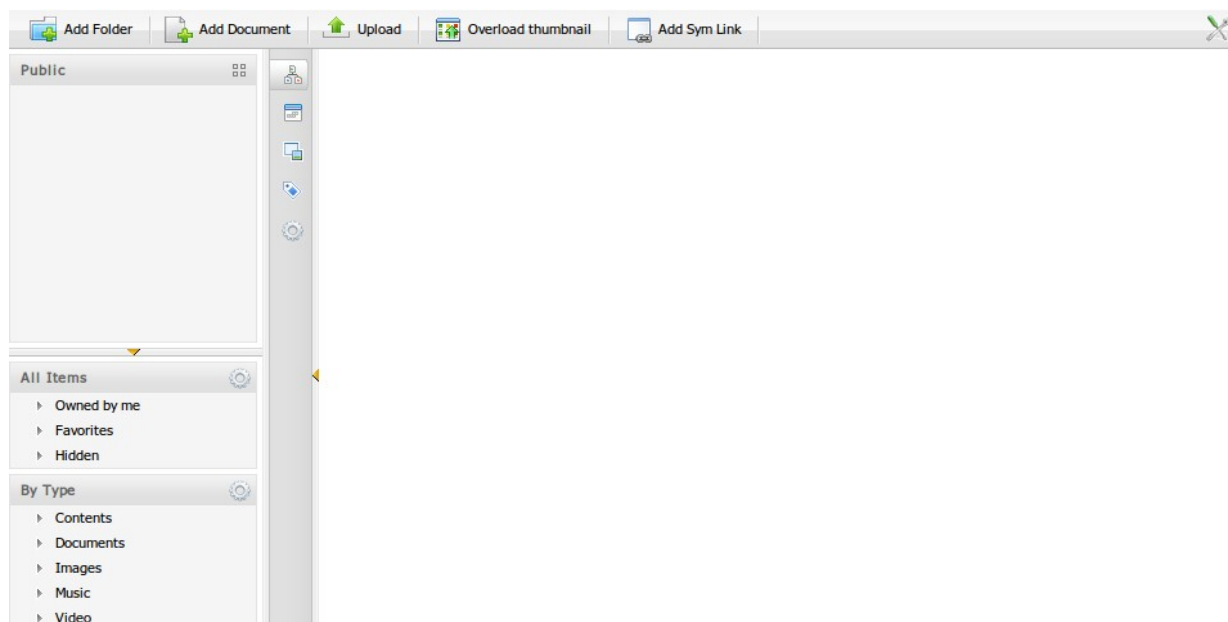


Illustration 31: The Public drive

With the Public drive, there's no initialized folder but you can create by yourself. In the Public drive, you also can take actions like in the Private drive.

3.3.2.3 Drive of a specific group

By default, there are two initialized folders but you also can add more and take actions like in Private drives. Only users in a specific group can access its drive.

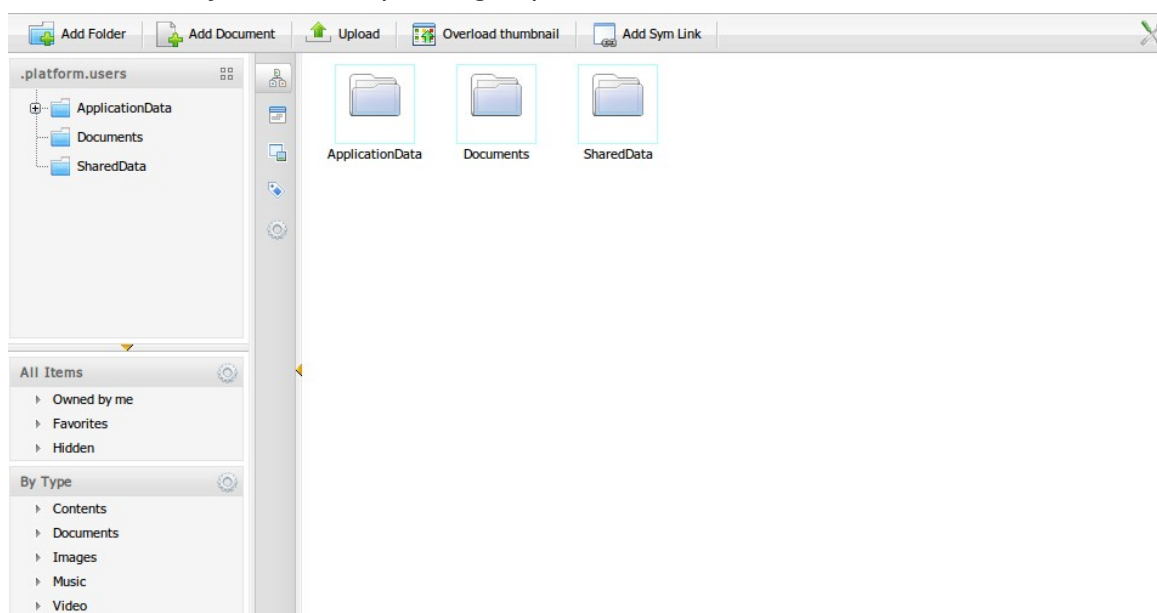


Illustration 32: Platform/User group

3.3.2.4 Shared Users Space drive

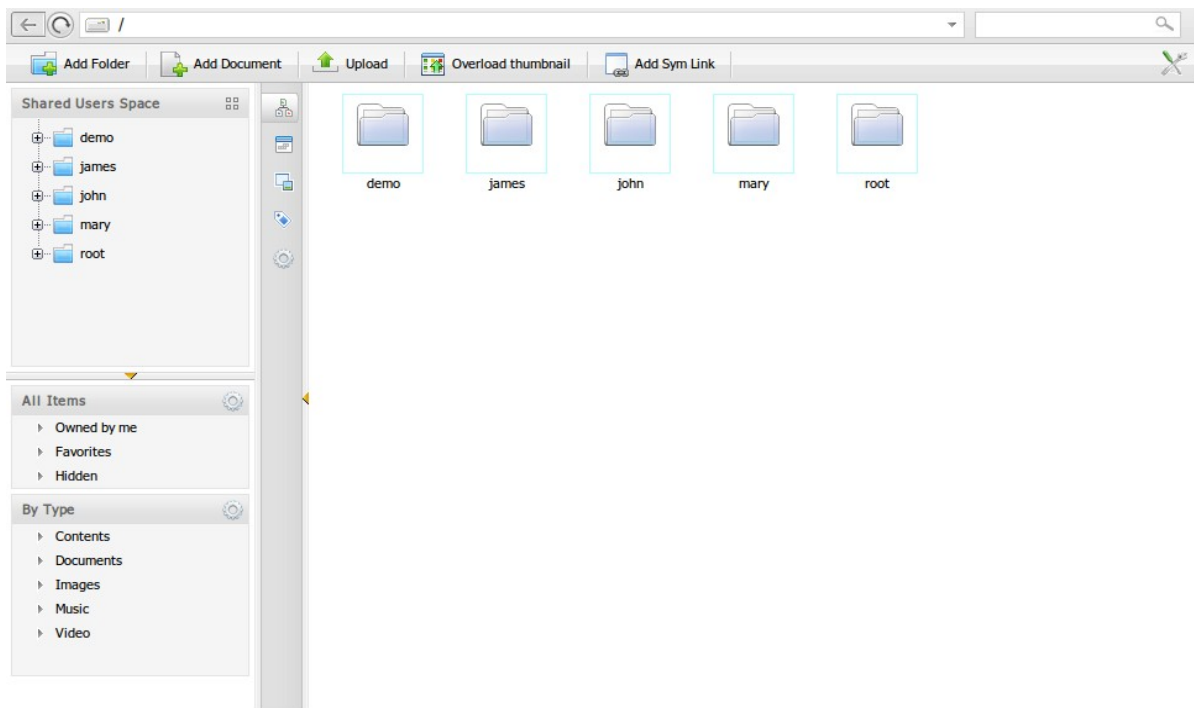


Illustration 33: The Shared Users Space drive

By default, there will be a list of all folders named after existing users, each user has a folder that includes two sub folders (private and public). You can see both your private and public folders here but you can see only the public folder of others.


- ◆ In this drive, you can:
 - Perform all actions that you can do in your private drive.
 - View nodes from public folder of others
- ◆ In this drive, you can not:
 - Add a folder/document in a root node
 - Add a folder/document in a folder named by other users and in child nodes of this folder.
 - Add a folder/document in a folder named by your username
 - Rename a default folder
 - Lock folders named by a user
 - Delete a default folder

3.3.2.5 Show/hide the sidebar in a drive

The side bar is used to show nodes like a tree or show the related documents, tags, clipboard and saved searches.

You can show/hide the side bar in 2 ways:

The 1st way:

Step 1: Click the  icon to open the 'Preference Setting':

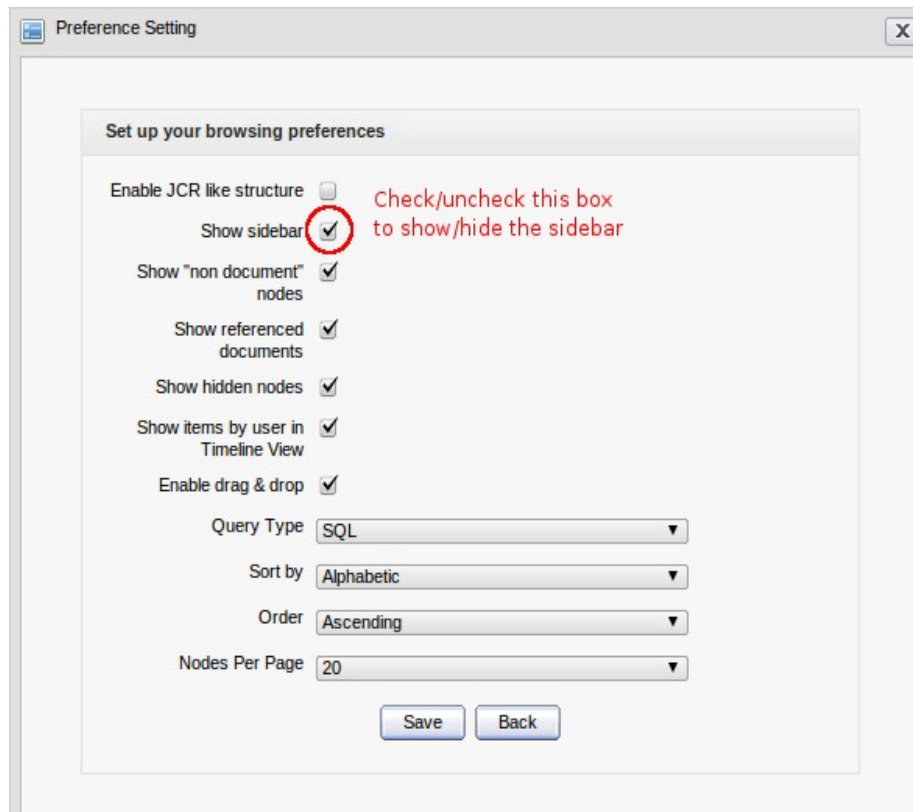


Illustration 34: The preference setting

Step 2: Unselect the **Show sidebar** check box.

After closing the side bar, the drive will be displayed like the illustration below:

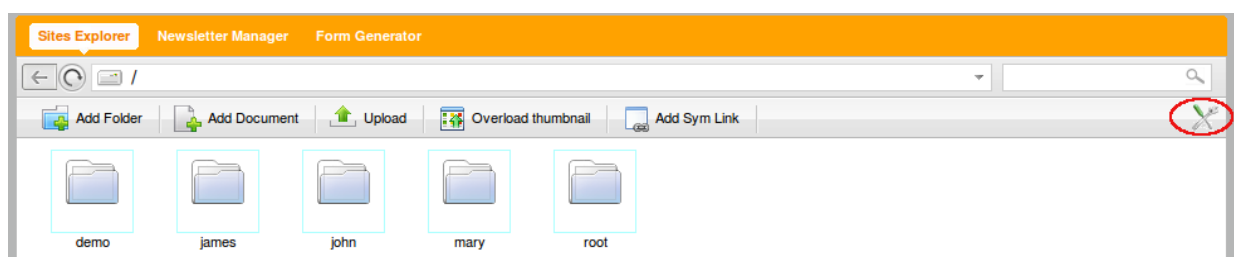
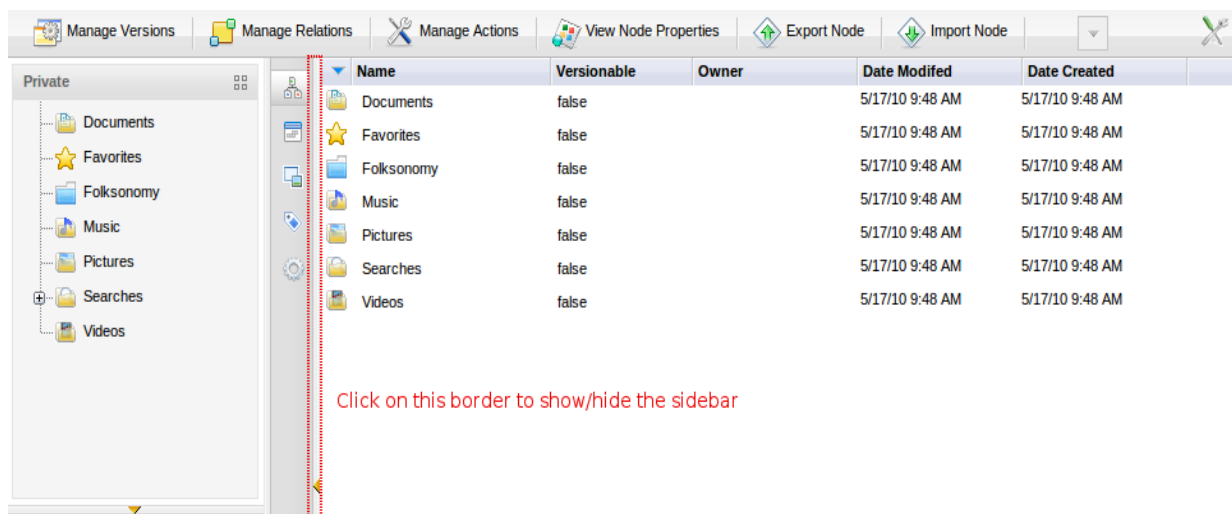


Illustration 35: The hidden side bar

To show the side bar, select the Show sidebar check box in the 'Preference Setting'.

The 2nd way:

Simply click the border of this sidebar to hide it.



Click that border again to show the sidebar back.

3.3.3 View types in Sites Explorer

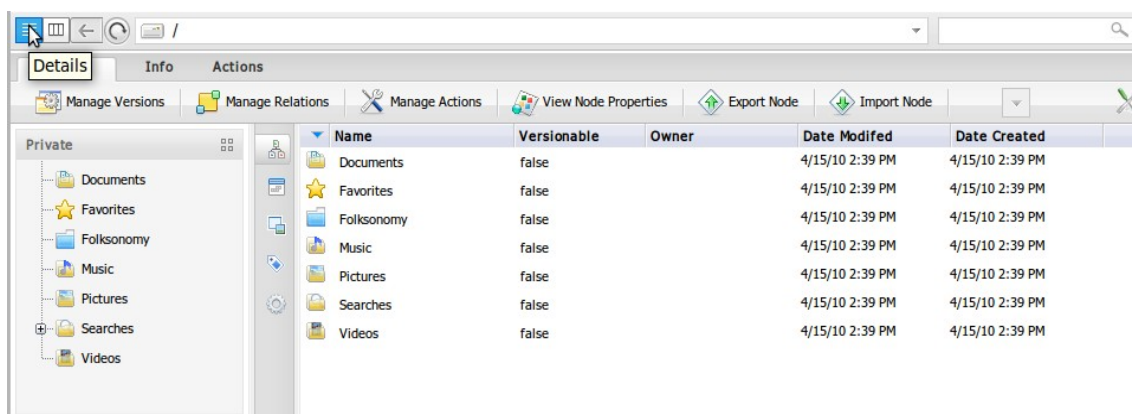
WCM supports you four ways to view nodes in a specific folder and show actions of corresponding tab on the **Actions** bar.



The number of View types depends on what drive you are browsing. You can manage the view types in the WCM Administration. See [here](#) for details

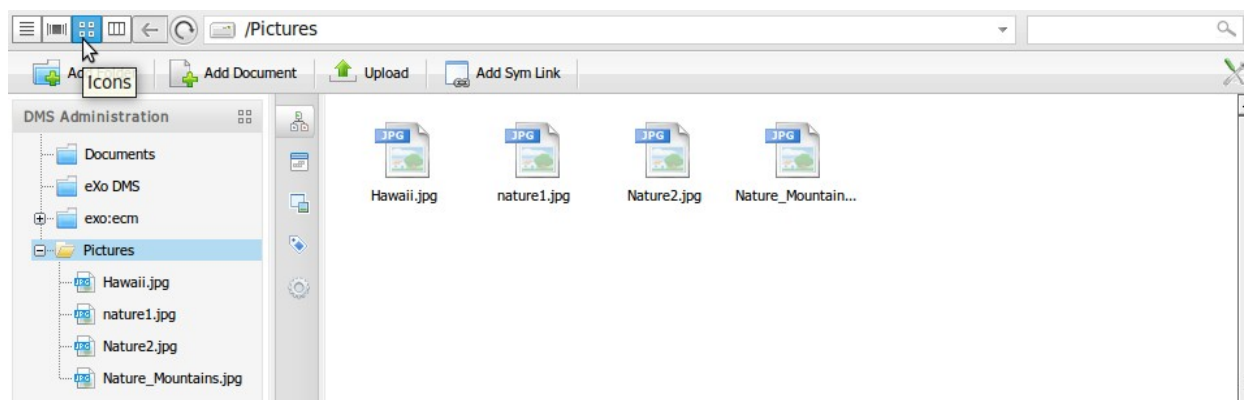
3.3.3.1 Details

In this view, each item in list includes following information: Name, Date Created, Date Modified, Owner, Versionable and Auditing. These information will help you manage nodes easily.



You also can sort nodes basing on node information by clicking the label of corresponding column. The ▼ icon indicates that nodes are ordered in ascending order and on the contrary, the ▲ icon means nodes are in descending order.

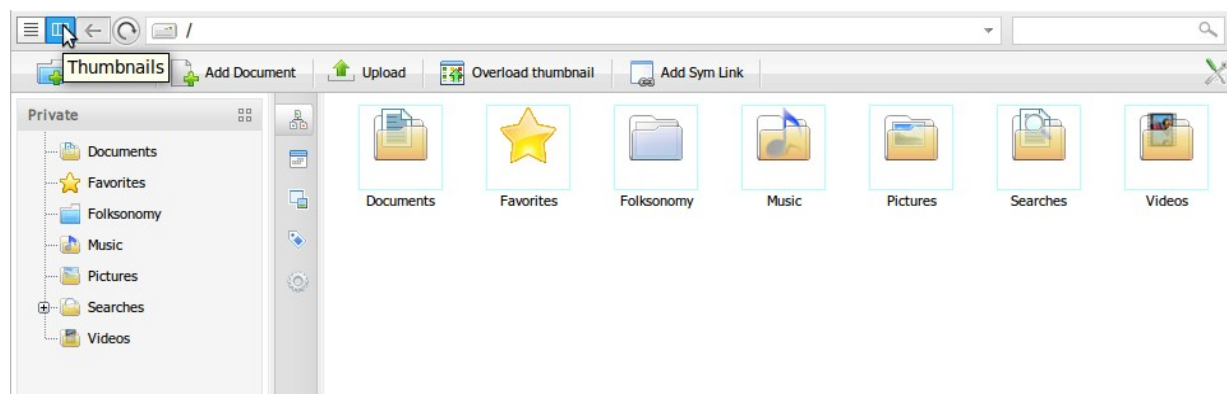
3.3.3.2 Icons



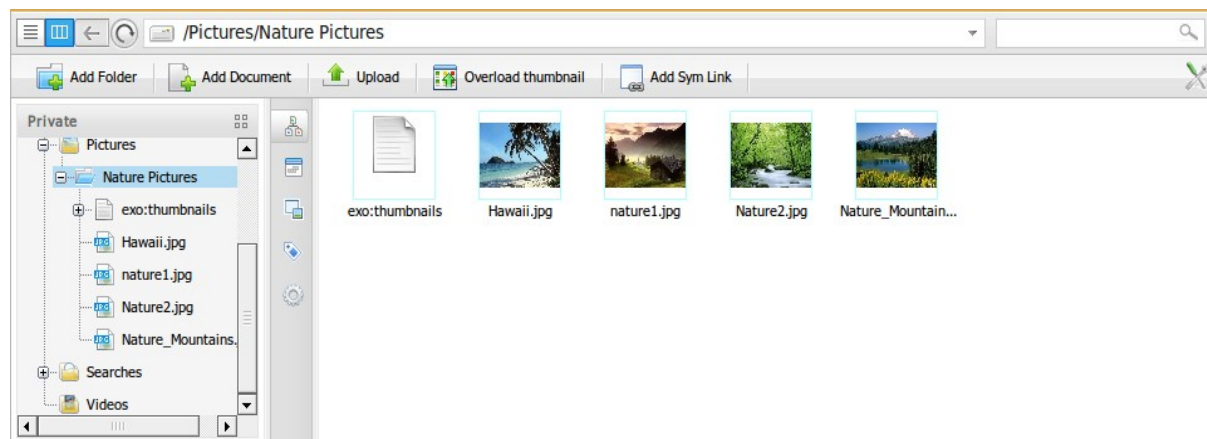
In this view type, nodes in a specific folder will be viewed as icons. The name of each node will be shown under its icon.

3.3.3.3 Thumbnails

With thumbnails view, nodes in a specific folder are viewed as icons bounded by frames. Name of each node is shown under its icon.



If nodes are image files, their thumbnails will be shown like the screenshot below:



Especially, in this view, you can overload thumbnail image for node. For an example, if you want to add thumbnail image for **Digital Assets** folder, do as follows:

Step 1: Select a folder (on the left or right panel) that you want to add a thumbnail image.

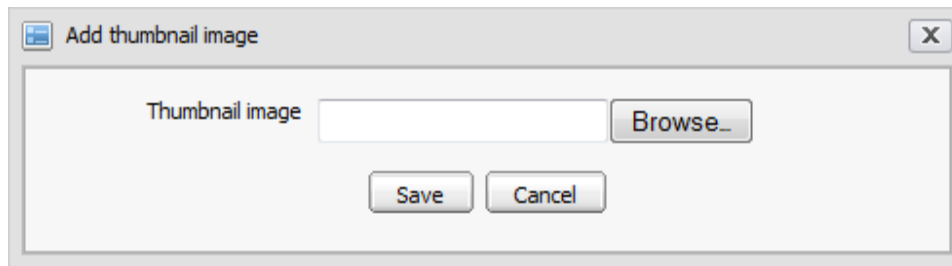



Illustration 36: The Add thumbnail image form

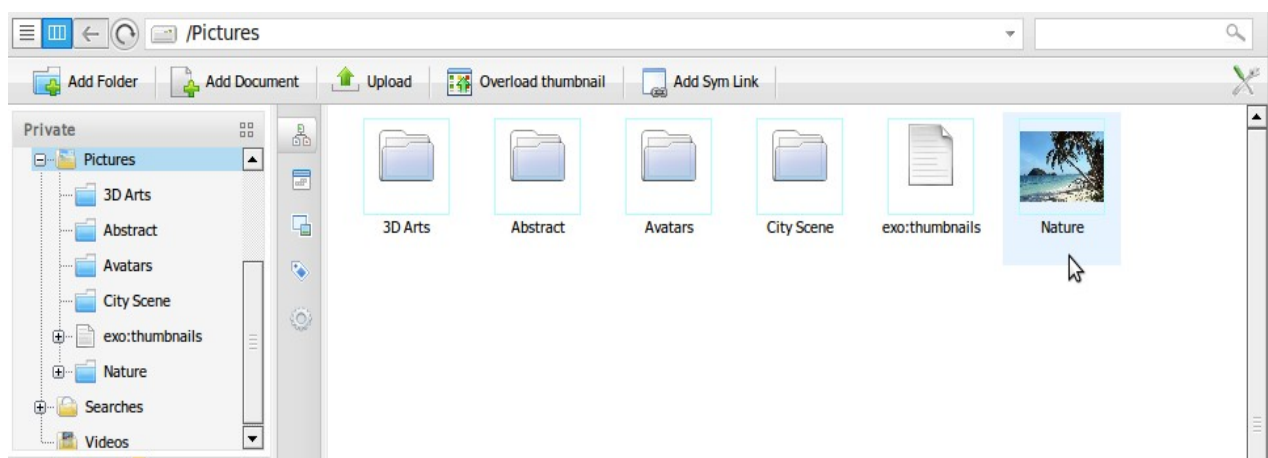
Step 2: Click  Overload thumbnail to open the **Add thumbnail image** form:

Step 3: Select an image used as a displaying icon for the selected folder by clicking the **Browse...** button.

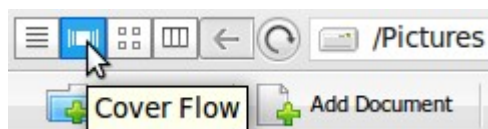
Step 4: Complete adding a thumbnail image by clicking **Save**. This node will be stored in a `exo:thumbnails` folder.

Back to the parent folder (folder Pictures in this example) that contains the selected folder to see a icon used to display:

3.3.3.4 Cover flow



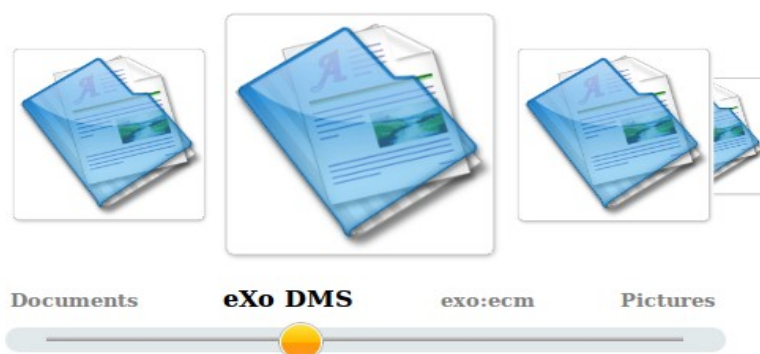
You can understand this view as a dynamical view because it brings the side – scrolling view to nodes in a folder. In this view, when a node is selected, its name is set with bold effect to more outstanding than others.



If nodes are pictures, they are shown like:



If nodes are documents or folders, they are displayed like the illustration below :




To move from one node to another one, you can do any of these ways:

- Use the mousewheel.
- Hold and move the yellow circle button to the left or the right.
- Click the folder/document name that you want to select.

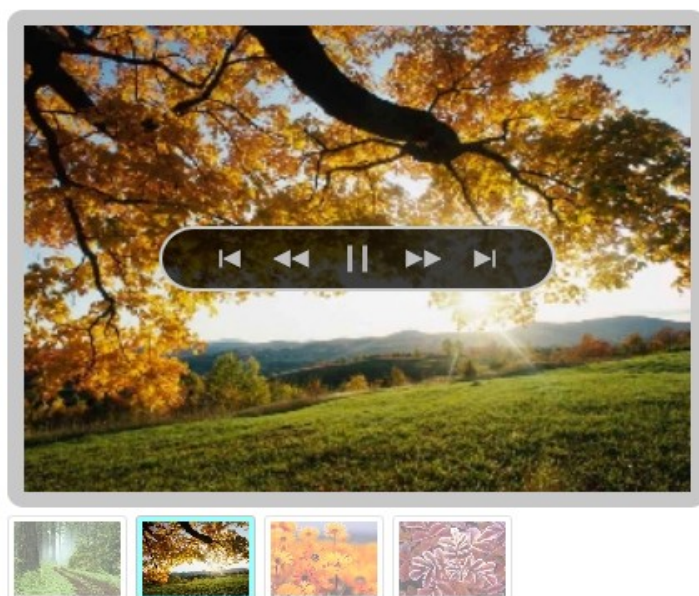
3.3.3.5 Slide show

In this view type, pictures in folders are viewed in slide show.

To view pictures in slide show, click the  icon:



If nodes are pictures, they are displayed like the following illustration:



The **Slide show** view automatically show all picture nodes, users can control this slide show by clicking the below buttons:

Details:



Go to the first picture node.



View the previous picture node.



Pause the slide show.



View the next picture node.




Go to the last picture node.



Continue viewing pictures node.

3.3.3.6 Timeline

This view allows users to view all nodes created and uploaded by time. Just click the  icon.

All the nodes that were created and uploaded will be displayed like below:



You can click directly on the node name to view its content in details.

	★	Name	Date time
Today			
	★	Forest.jpg	2/26/10 10:29 AM
	★	Green Sea Turtle.jpg	2/26/10 10:28 AM
	★	Waterfall.jpg	2/26/10 10:28 AM
	★	Forest Flowers.jpg	2/26/10 10:27 AM
Yesterday			
	★	Look More Beautiful With Longer Eyelashes	2/25/10 5:36 PM
	★	Communication Skills	2/25/10 5:55 PM

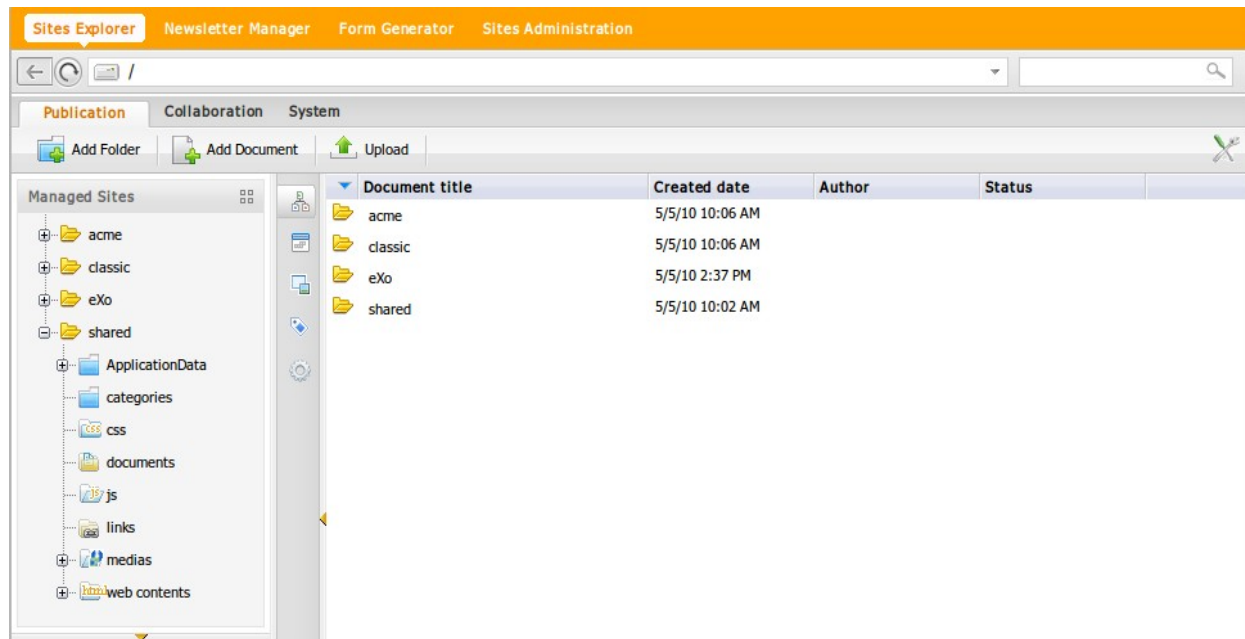
You can also click the ★ to mark your item as favorite or the ★ icon corresponding to nodes in order to remove it from favorites.

3.3.4 Actions in Sites Explorer

3.3.4.1 Manage Site Resources in one place

You can easily manage all the site resources in Sites Explorer.

Chose ★ **Sites Management** in General drive. All of your created sites and their resources will be listed in the left panel.



All sites contain typical folders:

	css	5/20/10 11:10 AM
	documents	5/20/10 11:10 AM
	js	5/20/10 11:10 AM
	links	5/20/10 11:10 AM
	medias	5/20/10 11:10 AM
	web contents	5/20/10 11:10 AM

a) CSS

CSS is one of default files of a site. This folder contains CSS data that is used to present data in a site and increase that site's content accessibility.



Once a new CSS file in a site is created, it will affect on how the site will look. For an example, the color of the current site's background is black but when you create a new CSS file with red background color , all site's background will be in red.

b) Document

This folder contains all documents used in a site. When you want to add a new document for a site, you also can put them outside this folder but you are recommended to put all documents in this folder to manage all site's documents easily and conveniently.



Illustration 37: Example of a 'Documents'

folder

c) JS

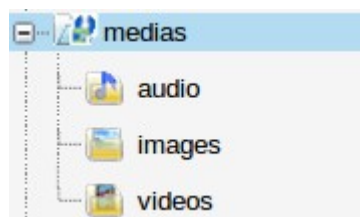
This is one of default files of a site. This file contains Java Script data that is used to make a site more animated and more dynamic.

d) Links

This file contains all links used in a site.

e) Media

This folder contains all documents related to videos, images and sounds. It is divided into three sub folders:



- *audio*: This folder contains sound data used in a site.
- *images*: This folder contains images used in a site.
- *videos*: This folder contains videos used in a site.

f) Web content

This folder contains all web content used in sites. You are suggested to put all web content files here to make use (in case you need to reuse web content files for creating a new site) and manage more flexibility.

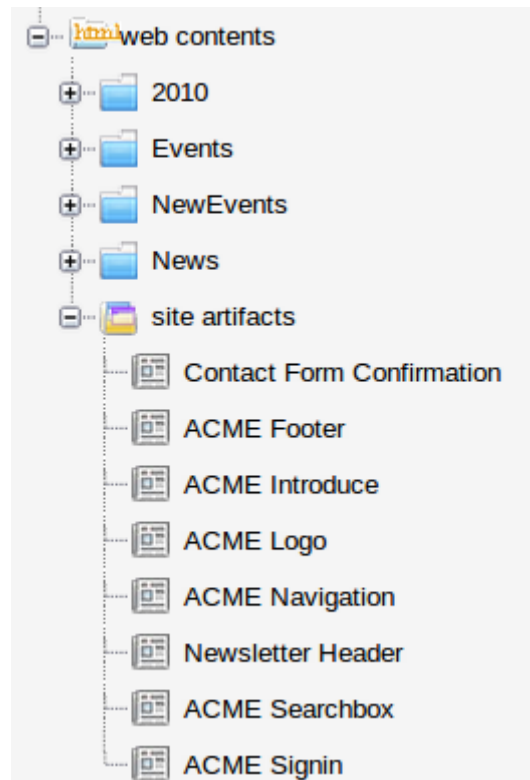


Illustration 38: Example of a 'Web content' folder

3.3.4.2 Basic Actions in Sites Explorer

A web content is a key resource to make a site. Other resources make a site more dynamic and animated by using layout, color, font, etc. This section focuses on how to manage a web content.

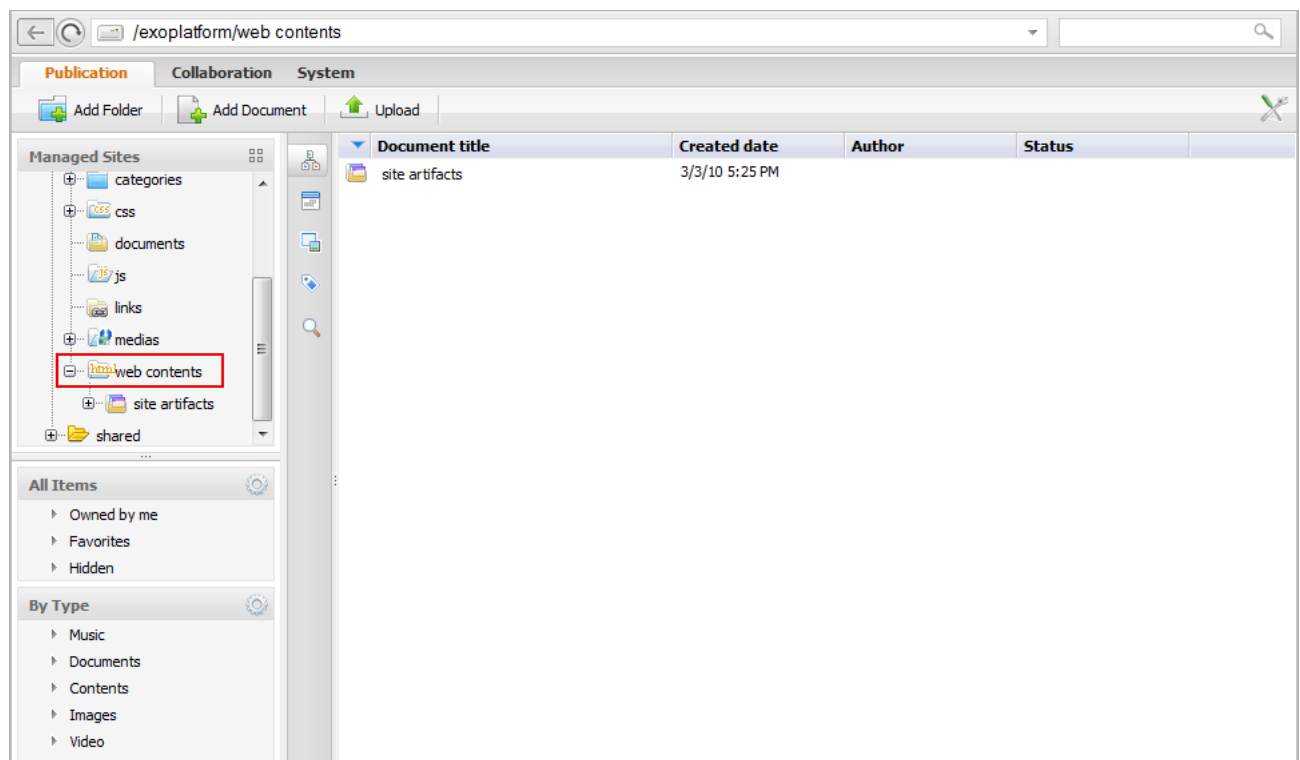
a) Create a new web content

This function is used to add a new web content into a specific site.

Do the following steps:


Step 1: Go to the drive of the site that you want to add a web content.

Step 2: Select the **web content** folder on the left:



In this step, you also can add a new web content into another folders (**documents** and **media** folder) of a site but you are recommended to select the **web content** folder because:

- Manage web content of a site more easily.
- You only may add a new web content in this folder so that you don't need to select a web content document in the list of document types. It makes adding a new web content more flexibly.

Step 4: Open the **Add New Document** form by clicking  **Add Document** on the **Action** bar.

Step 5: Select a template in the **Select Template** field to present web content:

Illustration 39: The Main Content tab in the Add New Document form

Details:

Select Template:

- Picture on head layout web content: The site's content is presented in two spaces. One for inserting an image and one for editing the site's content. In which, the image is put at the head of a site.
- Free layout web content: This template is a free layout.

■ The **Main Content** tab includes:

Name	The name of a web content that you want to add new
Title	The title of a web content
Main content	The main content that you want to display when publishing this web content
Save button	To accept saving the inputted values
Cancel button	To exit the current form

■ The **Illustration** tab:


It supports you to upload an illustration that makes the site's content more attractive.

Illustration 40: The Illustration tab in the Add New Document form

Details:

Illustration Image	The path to an image that you want to upload into a site. This image will be used like an illustration of that site
Image Type	The image format that you want to upload to the site. It can be: image/gif; image/png; image/jpg; image/jpeg
Summary	You can give short description about the web content because it will be displayed with the illustration image when the web content is listed. The main content will be shown when it is selected to be viewed

To upload an image to a site, do as follows:

- Browse an image list on your local computer by clicking the **Browse...** button and then select a specific location.
- Select an image in a list.
- Click the  icon to upload the selected image.

- The **Advanced** tab: this tab includes two parts: CSS data and JS data:

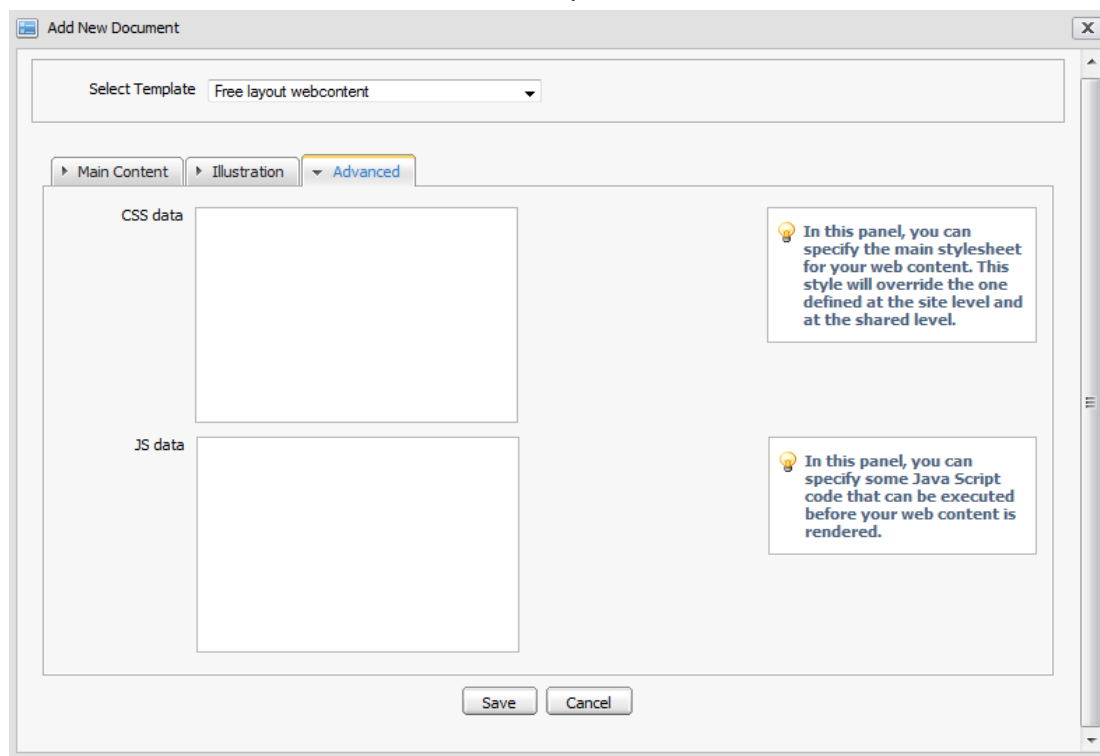


Illustration 41: The Advanced tab in the Add New Document form

CSS data: Contains CSS definition to present data in a web content. You can optionally enter CSS data into this field to specify the style.

JS data: Contains JS content to make the web content more dynamic when after publishing. You can optionally enter JS content in this field.

Step 6: Enter values in fields of the **Add New Document** form.

Step 7: Click **Save** to accept adding new web content into a site.



By default, the web content created in Site Explorer is in **Draft version**


b) Edit a web content

This function is used to edit a web content in a specific drive of an existing site.

Do the following steps:

Step 1: Go into the drive of a site which contains the web content that you want to edit.


Step 2: Select to view a web content by double - clicking it on the left tree or on the right. Detailed information of web content will be viewed on the right panel.

Step 3: Click  **Edit Document** on the **Action** bar to show the edit form of the selected web content as

Step 4: Change current values in fields of this edit form.

Step 5: Complete editing the selected web content by clicking **Save**.



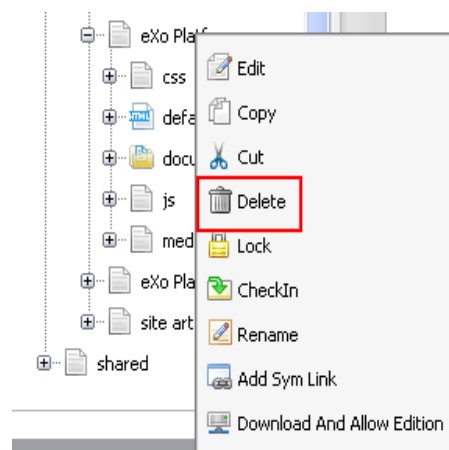
When you click  **Edit Document**, the web-content will be auto-locked for your editing. After finishing, the content is back to unlock status. You can manage Locks in the WCM Admin portlet.

c) Delete a web content

This function is used to remove a web content from the **web content** folder in a specific site's drive.

- ✓ To delete a web content, do the following steps:

Step 1: Right-click the name of the web content that you want to delete and then select Delete in the menu:



Step 2: There will be a confirmation message. Click **OK** to accept the deletion, or **Cancel** to quit without deleting.

d) Publish a web content

This function helps you publish a web content that you have added to **web content** folder in Sites Explorer.

- ✓ To publish a webcontent, do the following steps:

Step 1: Go to the drive of a site which contains the web content that you want to publish.

Step 2: Select to view it by double clicking it on the left tree or on the right.

Step 3: Show the Manage publication form by clicking



on the Action bar:

 A screenshot of the "Manage publication" window. It has two tabs: "Publication status" (selected) and "Publication history". Under "Publication status", it shows the revision "An Open Source Portal Pioneer" with a status flow: Enrolled (with a green checkmark icon) → Draft → live → Obsolete. Below this is a table of revisions.

Revisions	Date	Author	Status	Action
Revision: An Open Source Portal Pioneer	Mar 4, 2010 3:19:59 PM	root	Enrolled[current revision]	
Revision: 2	Mar 4, 2010 4:11:16 PM	root	Published	
Revision: 1	Mar 4, 2010 4:11:06 PM	root	Obsolete	

 At the bottom of the window is a "Close" button.

Illustration 42: The Manage publication form

■ The **Publication status** tab:

This tab lets you know about all statuses of versions. In which, you only may publish a content with the '**Live**' status. There are four statuses for a content. They are:

- *Enrolled*: The revision is created but never be edited .
- *Draft*: The revision's already been created and it is editable. Thus you can still edit it if you want.
- *Live*: The revision can not be modified anymore. In this status, the content is ready for publication.
- *Obsolete*: The revision is not live anymore and you should unpublish it if is was published.

Revision: An Open Source Portal Pioneer

Status:

Enrolled → Draft → live → Obsolete

Revisions	Date	Author	Status	Action
Revision: An Open Source Portal Pioneer	Mar 4, 2010 3:19:59 PM	root	Enrolled[current revision]	
Revision: 2	Mar 4, 2010 4:11:16 PM	root	Published	
Revision: 1	Mar 4, 2010 4:11:06 PM	root	Obsolete	

Close

Illustration 43: The Manage Publication form



You only can switch from one status to its next status. For example, your revision is in the **Enrolled** status and you only switch to the **Draft** status by clicking the **Draft** icon. After being switched, your revision will be in the **Draft** status

- The **Publication history** tab: This tab is used to keep track of publishing history of a site: Select the **Publication history** tab in the above form to view detailed information (including: Date, New State, User and Description) of a site's publication:

Date	Revision name	Current state	Author	Description
Mar 4, 2010 3:20:01 PM	An Open Source Portal Pioneer	Enrolled	root	enrolled
Mar 4, 2010 3:20:01 PM	An Open Source Portal Pioneer	Draft	root	draft
Mar 4, 2010 4:11:06 PM	1	Published	root	published
Mar 4, 2010 4:11:10 PM	An Open Source Portal Pioneer	Draft	root	draft
Mar 4, 2010 4:11:16 PM	1	Obsolete	root	obsolete
Mar 4, 2010 4:11:16 PM	2	Published	root	published

Close

Illustration 44: The Publication history of a site

If you want to change the position for publishing the selected web content, select the

current path and click right to left arrow to remove the path the select another location.

Step 4: Click **Close** to close this form and publish successfully.

After being published, all users who have the right to access that position can view the published web content as a page on the Navigation bar.

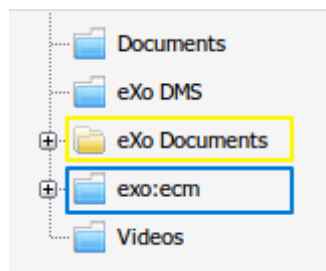
3.3.4.3 Manage Folders

a) Create a new folder

You can create a document immediately in a specific drive; however, to manage documents better, the created folder should contain documents in it.

There are two types of folder:

- Content folder
- Document folder



In default skin, the icon for a content folder node is displayed in blue and the icon for a document folder node is displayed in yellow.

File and folder types in a folder

Content folder

- ✓ You can add a Content Folder folder into a Content Folder one.
- ✓ You can add a Document Folder folder into a Content Folder one.
- ✓ You can add documents into a Content Folder
- ✓ You can upload files (images, MS word documents, OpenOffice documents, .pdf files, .txt files, .xml file, etc) into a Content Folder
- ✓ You can import sub node(s) that was exported into a Content Folder

Document folder


- ✓ You can add a new Document Folder into a Document Folder
- ✓ You can add File, Podcast, File Plan documents into a Document Folder
- ✓ You can upload files (images, MS word documents, OpenOffice documents, .pdf files, .txt files, .xml file, etc) into a Document Folder

- ✓ You can not add a Content Folder into a Document Folder
- ✓ You can not import an exported a Content Folder into a Document Folder
- ✓ You can not import an exported Article, Sample node, Kofax into a Document Folder

Create content folders

Do as follows:

Step 1: Select the path to create a folder.

Step 2: Click  **Add Folder** from the action bar. The **Add a Folder** form is displayed:

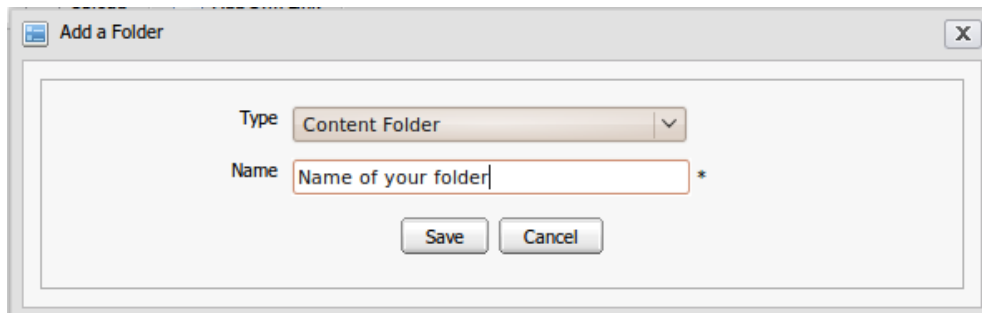


Illustration 45: The Add a Folder form

Step 3: Click the  icon to see type list and select the **Content Folder** type.

Step 4: Input value for the **Name** field. This field is required. You can not input some special characters in the **Name** field (@ # % & * () " ' : ; [] { } / !)

Step 5: Click **Save** to accept creating a new folder.



- A folder name can be the same with the existing one. When a new folder is created with the same name with other existing folder, after you click **Save**, its name will be added an index (e.g: test[2]).
- You can only create a content folder in another content folder.


Create document folders

You can create a document folder in a content folder or a document folder.

Do as follows:

Step 1: Select the path to create a new folder.

Step 2: Select the **Actions** tab .

Step 3: Click  **Add Folder** . The **Add a Folder** form appears:

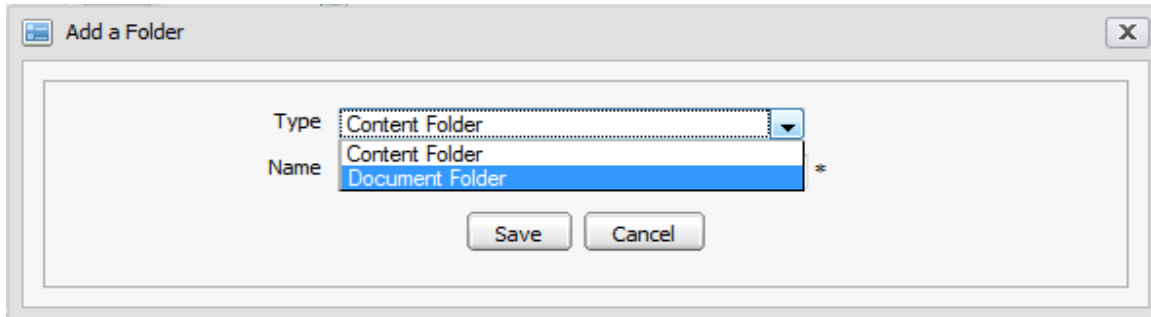



Illustration 46: The Add a Folder form

Step 4: In the **Add a folder** form, click  to see the folder types list and select Document Folder.

Step 5: Enter a value for the **Name** field. This field is required. Some special characters are not allowed to inputted in the **Name** field: (@ # % & * () " ' : ; [] { } / !)

Step 6: Click **Save** to accept creating a new folder.



*Like a content folder, A folder name can be the same with the existing one. When a new folder is created with the same name with other existing folder, after you click **Save**, its name will be added an index (e.g: test[2]).*

b) Upload files into folders

This function supports you to upload a file from your machine. All file types can be uploaded. The uploaded file's name must not include some special characters (! @ \$ % & + [])

- ✓ To upload file into folder, do as follows:

Step 1: Select the folder that you want to upload a file into from the left/right panel

Step 2: Select the **Actions** tab to show some actions on the Action bar.

Step 3: Click the  **Upload** on the Action bar to open the **Upload a file** form:

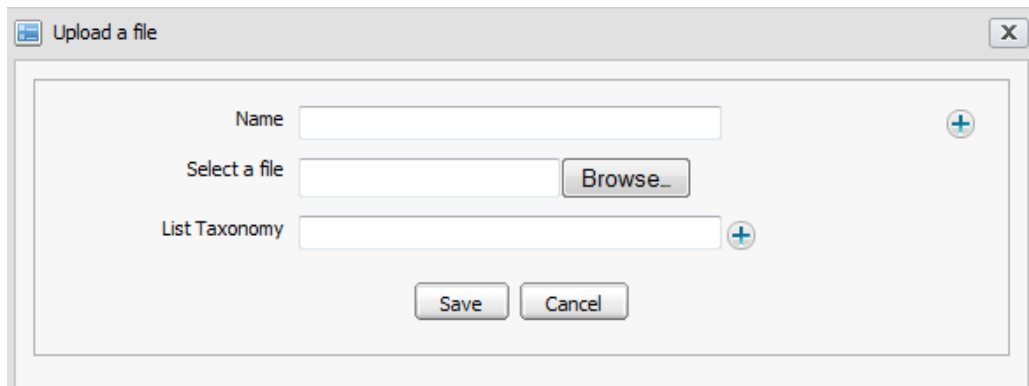




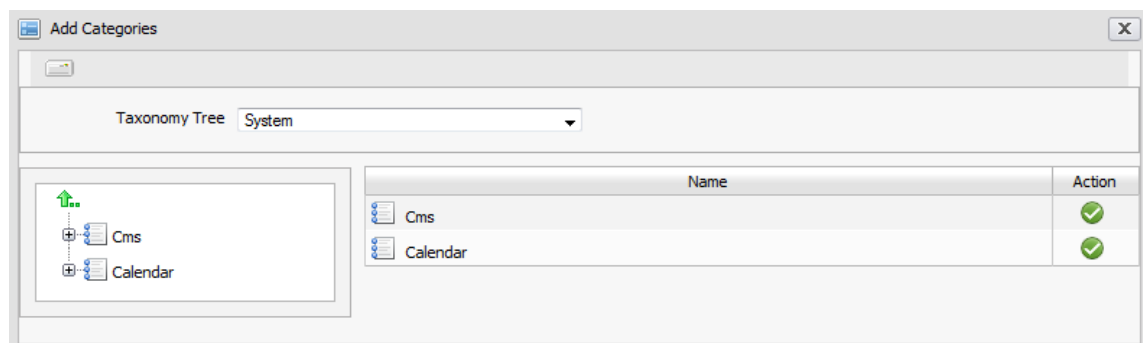
Illustration 47: The Upload a file form



Step 4: Browse and select a file on your computer by clicking the **Browse...** button. The selected filename will be displayed in the **Select a file** field.


Step 5: You can change the uploaded file by clicking the  icon and select **Browse...** again to select another one.

Step 6: By default, the name of the uploaded file will be kept as original but if you want to change, you can type the new name in the **Name** field, this field is not required. The new name must not contain special characters: ! @ \$ % & + [].

Step 7: You can click the  icon next to the List Taxonomy field to add categories for this file:



Name	Action
Cms	
Calendar	


Step 8: Select categories by clicking the icon . Click '+' to open child nodes of categories.

Name	Action
Birthday	✓
Breakfast	✓
Call	✓
Lunch	✓
Meeting	✓
Other	✓
Personal	✓
Professional	✓

Illustration 48: The Add Category form




You can add more categories for a file by clicking the  icon again to open the **Add Categories** form.

Click the  icon to delete category in **Upload a file** form.


You also manage categories which added for files by using the **Manage Categories** function. See [here](#)

Step 9: Complete uploading file by clicking **Save**.

Step 10: After being saved, the main information of the uploaded file will be displayed:

File name	Node name	File size	Mime Type	Manage Metadata
eXo template.odt	eXo template.odt	1.72 MB	application/vnd...	

Close

Step 11: Click the  icon to see more details of its external metadata information. The **List external metadatas** tab will be enable and you can input value in this tab.

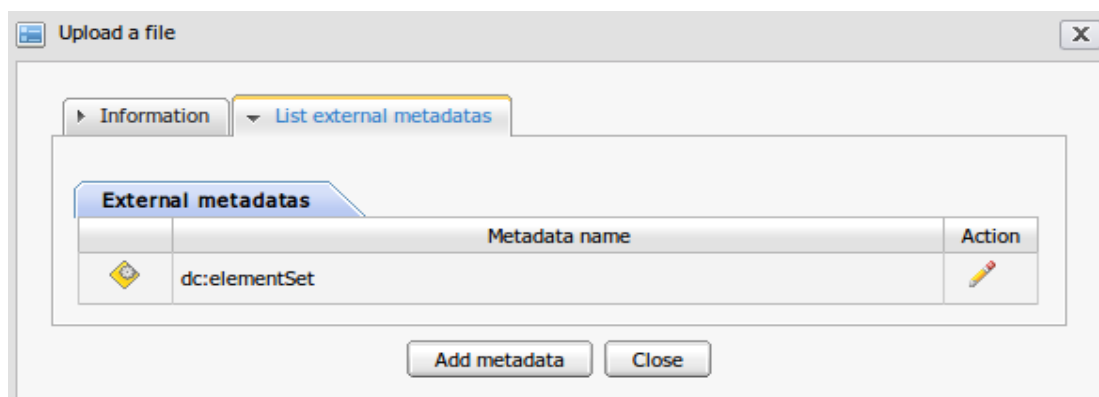


Illustration 49: The Upload a file form

Step 12: Click **Save** to accept changes or **Cancel** to quit without any changes.

Step 13: Data can be added for the uploaded file. Check the checkbox, then click **Add**, or **Cancel** to quit without adding anything.

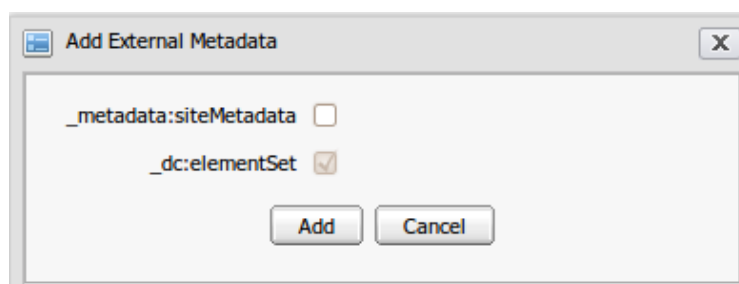
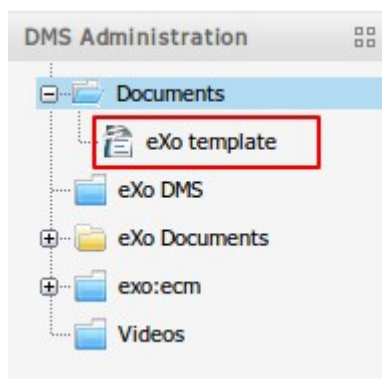


Illustration 50: The Add External Metadata form

Step 14: New metadata is displayed in External Metadata list and you also can edit it by clicking .


Step 15: Click **Close** to quit the **Uploaded information** form.

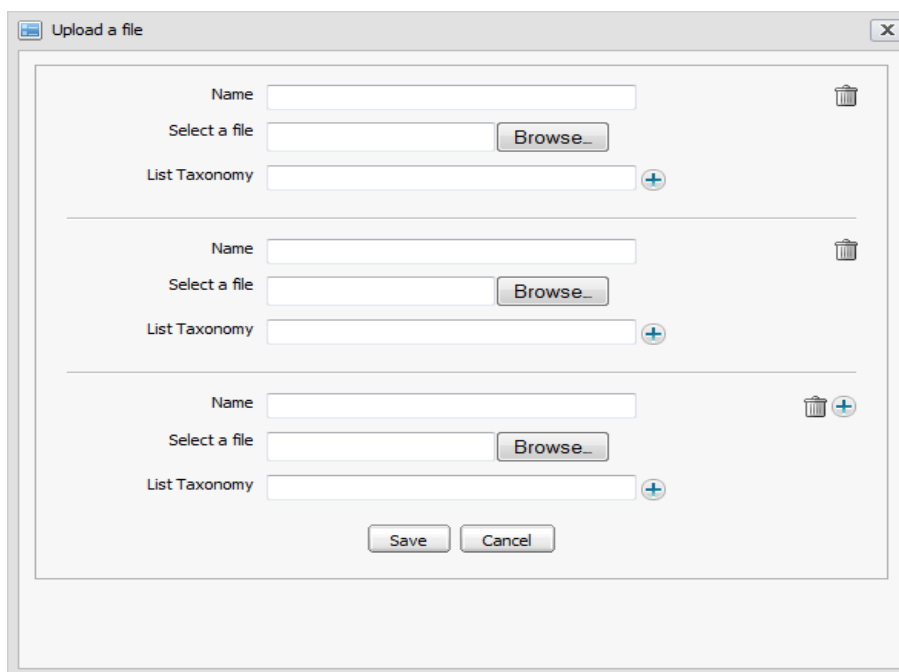
Step 16: After being uploaded, the tree is displayed in the left panel:






The size of the uploaded file depends on the size limit of the uploaded file that you set up in the 'Edit' mode of Sites Explorer. If your file size exceeds the limit, a pop-up message will appear to alert you.

If you want to upload multiple files at the same time, click  to open more forms to upload more files:



Click the **Browse** button to upload files that you want to. The icon  enables users to delete the upload file form.

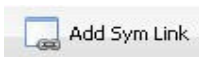
c) Add SymLink

For the purpose of fast accessing the node that you want to look for in other nodes, adding a sym link for a node is an effective way to meet this need.

- ✓ To add a sym link for a folder, do as follows:

Step 1: Select the node that you want to add a sym link.

Step 2: Select the **Actions** tab to show some actions on the Action bar

Step 3: Click the  on the Action bar. The **Sym Link Manager** pop-up will appear:

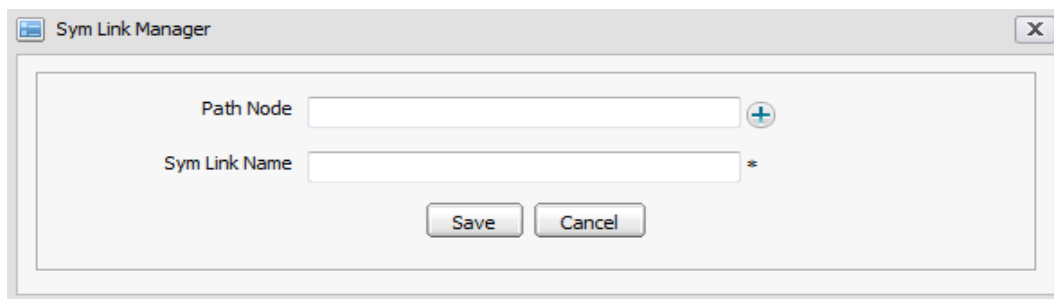
A screenshot of the 'Sym Link Manager' dialog box. It has a title bar with a close button (X). Inside, there are two text input fields: 'Path Node' and 'Sym Link Name'. The 'Sym Link Name' field has an asterisk (*) to its right. Below the fields are two buttons: 'Save' and 'Cancel'. There is a small blue plus icon (+) to the right of the 'Path Node' field.

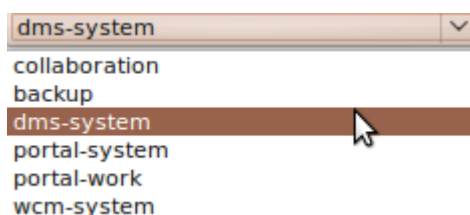
Illustration 51: The Sym Link Manager form


Details:

Path Node	The path of a link.
Sym Link Name:	The name of a link.

Step 4: Click the  icon to open the **Choose Target Node** form.

Step 5: Choose the workspace which contains the node that you want to add a sym link.

A screenshot of a dropdown menu titled 'Choose Target Node'. The dropdown is open, showing a list of nodes: 'dms-system', 'collaboration', 'backup', 'dms-system', 'portal-system', 'portal-work', and 'wcm-system'. A mouse cursor is pointing at the 'dms-system' entry in the list. The top of the dropdown shows 'dms-system' with a downward arrow.

Step 6: Click the icon  in the row of the node that you want to add, the path of that node will appear in the **Path Node** field and the name of the node is set by the name of the selected node. You can also edit this name.

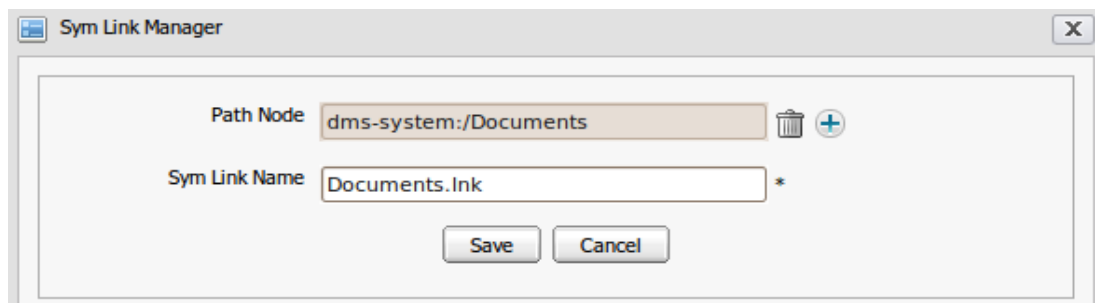
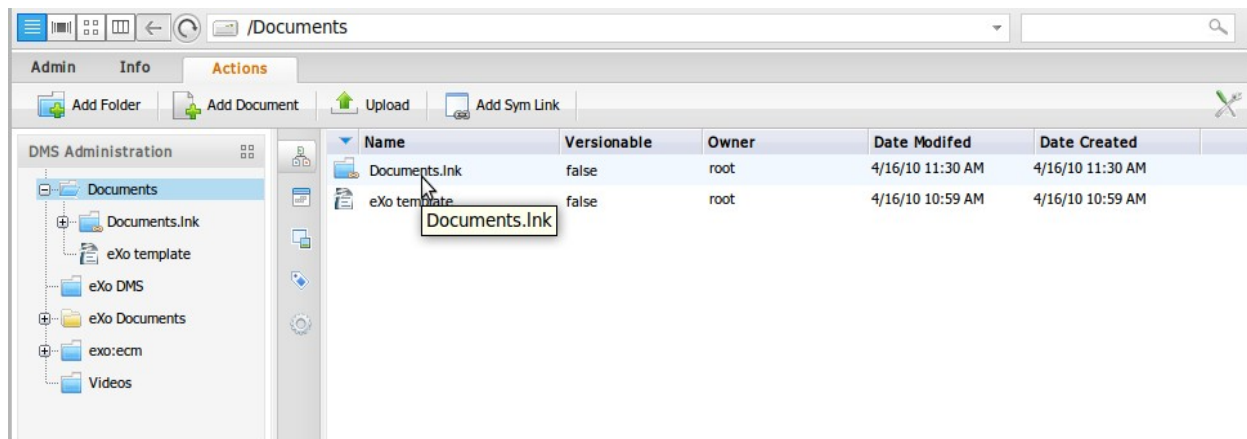
A screenshot of the 'Sym Link Manager' dialog box after selecting a node. The 'Path Node' field now contains 'dms-system:/Documents' and has a trash icon and a plus icon to its right. The 'Sym Link Name' field now contains 'Documents.Ink'. The 'Save' and 'Cancel' buttons are still at the bottom.

Illustration 52: The Sym Link Manager form

Step 7: Click **Save** to add a sym link.



You can select multiple nodes at once by holding the **Ctrl** or **Shift** key and select nodes or move mouse over nodes. By using this feature, you can take some actions (copy, cut, delete, lock/unlock) on different nodes at the same time.

d) Copy/Paste Folders

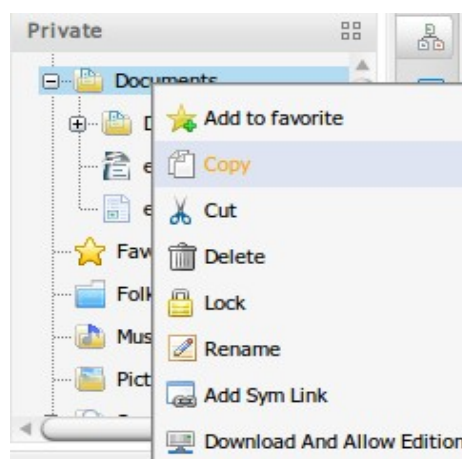
There are two ways to copy folders to other places:

The 1st way: Copying/Pasting folders from the menu

Do as follows:

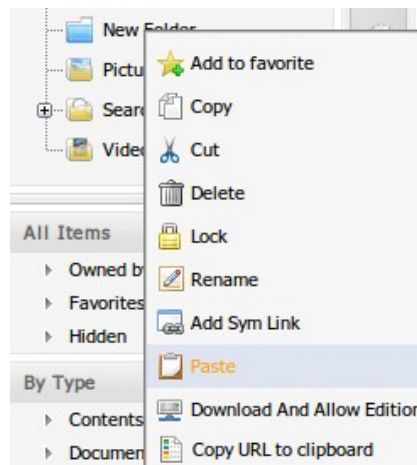
Step 1: Select a folder that you want to copy on the left or right panel.

Step 2: Right-click the selected folder and select **Copy** from the menu:



Step 3: Select the path to the destination node that you want to make a copy.

Step 4: Right-click the destination node and select the **Paste** item in the menu.



Step 5: The copied folder (and its sub-folders) will be pasted to the new selected path.

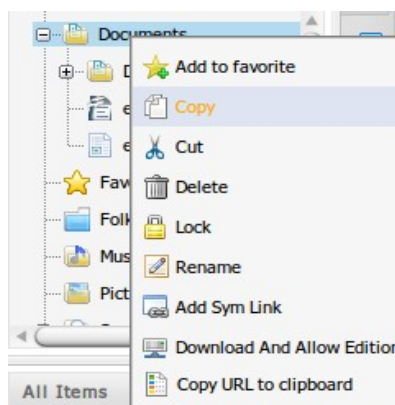


- You only can take the **Copy** action if you have a right on the source node.
- You only can take the **Paste** action if you have a right on the destination node.
- If the destination node has the same name with the copied node, after being pasted, the copy node will be added an index with its name. For example, in this case, if "new folder" contains a node with name "Live", then after the paste action, in "new folder" there are two nodes with name Live and Live[2].
- You can not copy a content folder into a document folder.
- After taking the **Copy** action, you can take the **Paste** action on different nodes before taking another **Copy** or **Cut** action.

The 2nd way: Copy/Paste folders from the Clipboard

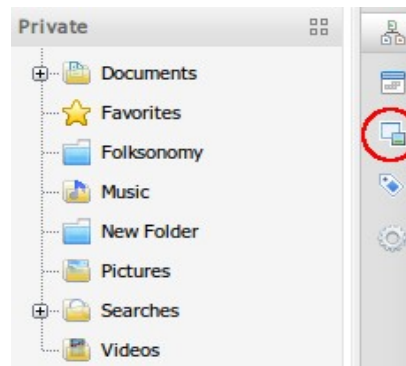
Do as follows:

Step 1: Right-click a folder that you want to copy and select the **Copy** item in the menu:

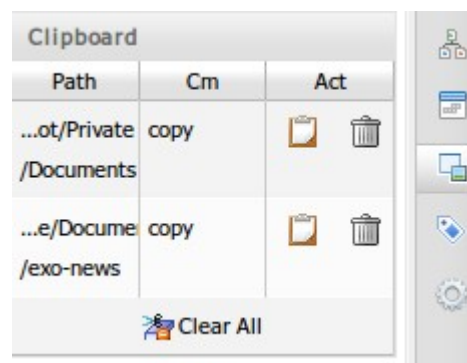


Step 2: Select a destination node that you want to make a copy.

Step 3: Select the **Clipboard** item:



There will be a list of all copying/cutting actions waiting for being pasted.



Step 4: Click the icon to paste the copied node into the selected destination node in step 3.

Step 5: You can click the icon to delete a specific waiting statement.

Step 6: Or you can click the button **Clear All** to delete all waiting statements in the list.

There will be a successful/unsuccessful message with the destination path or detailed reason after taking the **Paste** action.



- You only can take the **Copy/Paste** action if you have a right on the source/destination node
- If the destination node has the same name with the copied node, after being pasted, a copied node will be added an index with its name. For example, in this case, if "new folder" contains a node with name "Live", after taking the **Paste** action, in "new folder" there are two nodes named **Live** and **Live[2]**
- You can not copy a content folder into a document folder.
- If there are more than one **Copy/Cut** action on 1 folder, in Clipboard only the nearest action is listed to wait for the **Paste** action.

- If you delete the copy waiting statement from a Clipboard, the **Paste** action in a right-click menu also be deleted.

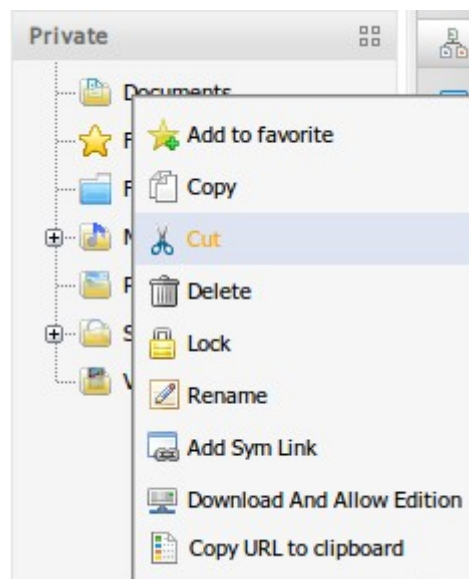
e) Cut/Paste folders

There are two ways to move a folder from a current place to another one.

The 1st way: Cut/Paste folders from the menu

Do as follows:

Step 1: Right-click a folder that you want to cut then select **Cut** from the menu:



Step 2: Select the path to the destination node that you want to move to.

Step 3: Right-click a destination node and select **Paste** from the menu. Note that the **Paste** function is enable in the menu only after taking the **Copy/Cut** action. The cut node will be moved to a new place.



- You can do the **Cut/Paste** action only when you have a right on the source/destination node.
- If a destination node has the same name with the cut node, after being pasted, the cut node will be added an index with its name. For example, in this case, if "new folder" contains a node named "Live", then after the **Paste** action, in "new folder" there are two nodes named **Live** and **Live[2]**.
- You can not cut and paste a content folder into a document folder.
- After the **Cut** action, you can take the **Paste** action only one time.

The 2nd way: Cut/Paste folders from the Clipboard

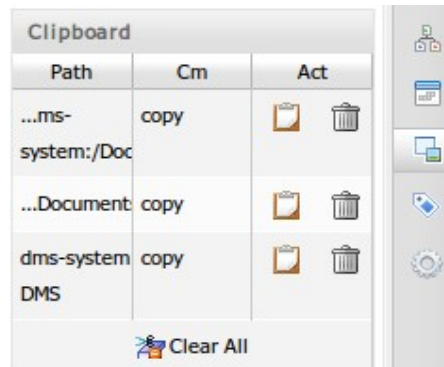
Do as follows:

Step 1: Right-click a folder that you want to cut and select the **Cut** item in the menu.

Step 2: Select the path to the destination node that you want to move to.

Step 3: Select the **Clipboard** item:

There is a list of all copying/cutting action and waiting for being pasted:



Step 4: Click the icon to paste a cut node into the selected destination node at step 3.

Step 5: You can click the icon to delete a specific waiting statement.

Step 6: Or you can click the **Clear All** link to delete all waiting statements in list.



- You can do the **Cut/Paste** action only when you have the right on the source /destination node.
- If the destination node has the same name with a cut node, after being pasted, a cut node will be added an index with its name. For example, in this case, if a destination node contains a node named "new", then after taking the **Paste** action, in a destination node there are two nodes named "new" and "new[2]".
- You can not cut and paste a content folder into a document folder.
- If there are more than one Copy/Cut action on 1 folder, in a Clipboard only the nearest action is listed.
- If you delete the cut pending statement from a Clipboard, the **Paste** action in the right-click menu can also be deleted.

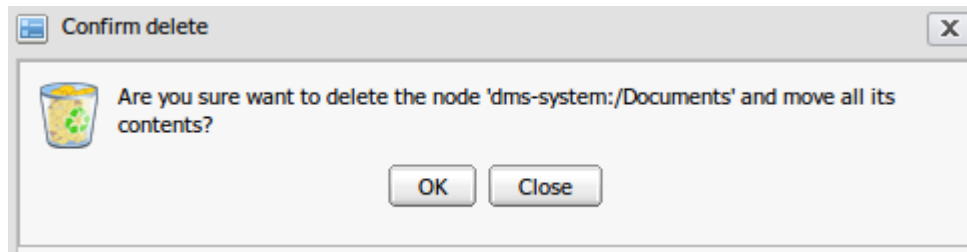
f) Delete folders

This function helps you remove folders easily.

Do as follows:

Step 1: Right-click a folder that you want to delete then select **Delete** from the menu:

A confirmation message appears:



Step 2: Click **OK** in the confirmation message to accept deleting, or **Cancel** to quit.




- You only can take the **Delete** action if you have the right on a node.
- If the deleted folder contains sub-nodes, they are also deleted.

g) Drag and drop folders

This function supports you to move folders from a current location to an another one by using the drag and drop feature.

Do as follows:

Step 1: Move a cursor on a folder or folders (To select multi-folder at once: keep **Ctrl** or **Shift** key and select folders) on the right panel till the the cursor changes to .

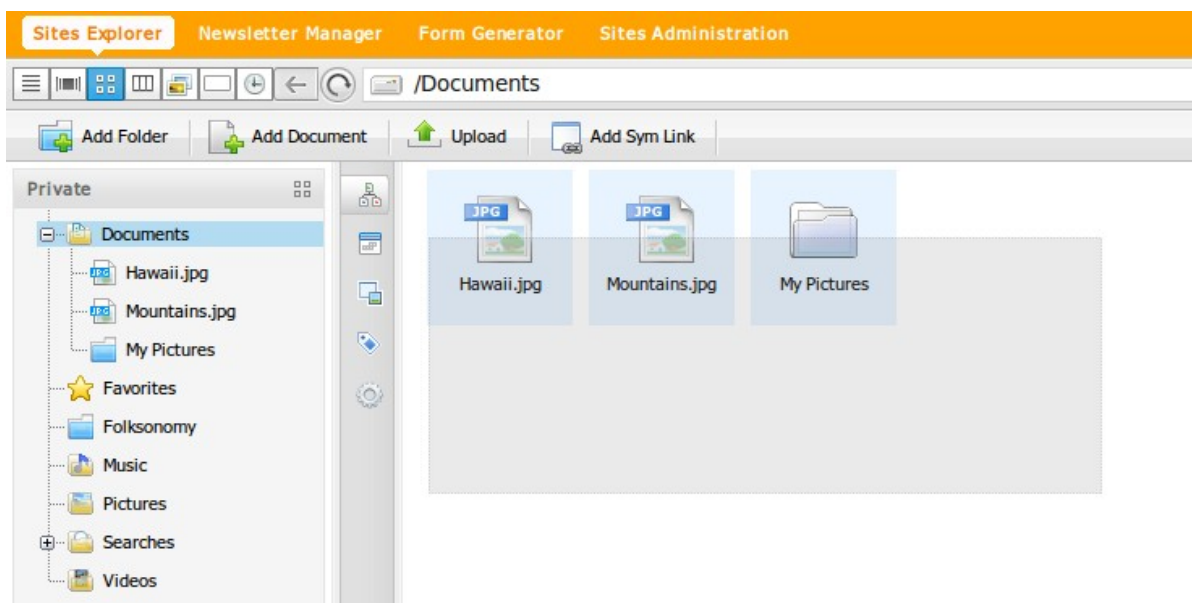


Illustration 53: Chose the folder you want to move on the right panel

Step 2 Press the left mouse and then drag the selected folders to another folder on the right or left panel:

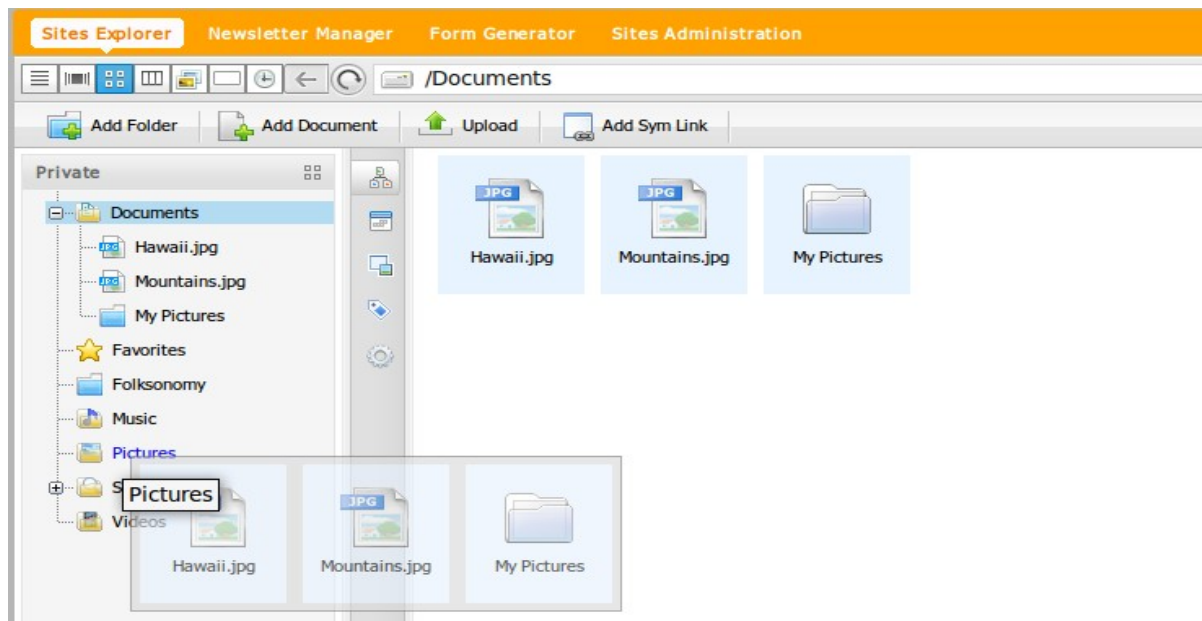


Illustration 54: Drag folder(s) to the new location in the left panel

Step 3 Drop them to the selected folder. All dragged folders will be moved to the destination folder.

h) Lock/Unlock folders

This function supports you to avoid changes on a specific folder by others in a specific time.

Lock folders

Just right-click a folder (from left or right panel) and select **Lock** from the menu. The selected folder will be locked.



- Only users who have right can take this action.
- After being locked, others can only view it.
- The lock status can be kept in a current session only, if the locker sign out, the node will be unlocked.
- Other users can make a copy of a locking node in other places by doing **Copy** and **Paste** it into another node but users can not remove it or perform other actions.
- If you lock a folder but do not take any action on it, after 30 minutes, it will be unlocked automatically.

Unlock folders

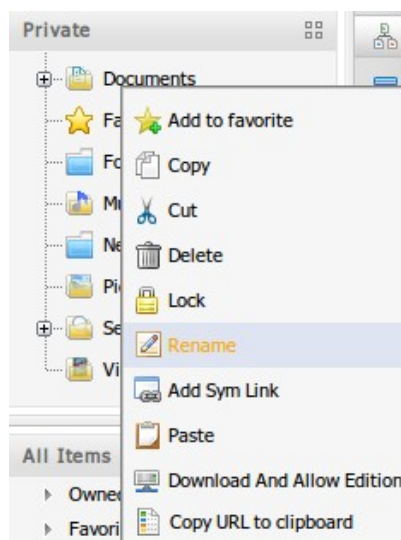
To unlock a folder, right-click a locked folder and select the **Unlock** item in the menu.
The locked folder will be unlocked; thus others can take actions on it.

i) Rename folders

This function is used to change the name of a folder.

Do as follows:

Step 1: Right-click a folder that you want to rename then select **Rename** from the menu:



The **Rename** form will appear:

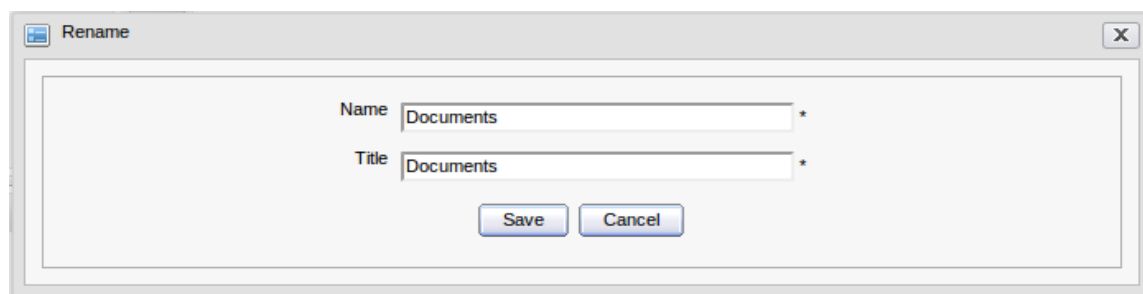


Illustration 55: The Rename form

(*): *required*

Step 2: Input a new name in the **Name** field. You can also change the title of this folder by inputting new one in the **Title** field.

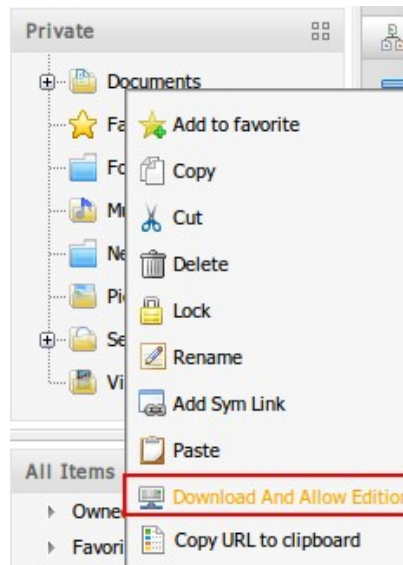
Step 3: Complete renaming a folder by clicking **Save**.

j) WebDAV View

WebDAV enables you to access files, folders and read and write documents over the web. Due to its benefits of easy, quick and flexible manipulations and time saving, WebDAV is used to view nodes.

- ✓ To view nodes in webDAV, do as follows:

Right-click a node (from left or right panel), then select the **Download and Allow Edition** in the menu:



With each type of node, the form to view in WebDAV will be different:

- ✓ *With folder*: the sub nodes list of the current folder will be displayed in WebDAV
- ✓ *With 'nt:file'*: the content of the document will be shown in WebDAV
- ✓ *with 'Article'*: by default, it does not list any folder. But if Article includes some actions or added language, etc all folders will be listed with names: exo:actions, languages, and more.
- ✓ *With 'Podcast'*: to view in WebDAV, there will be a form that users have to download this document.
- ✓ *with 'Sample node'*: by default, it lists folder name exo:image. Like Article, if Sample node has some actions or added language, etc all folders will be listed with name: exo:actions, languages, and more.
- ✓ *With 'File Plan'* : by default, it lists folder named exo:actions. if File plan has some actions or added language, etc all folders will be listed with names: exo:actions, languages, and more.
- ✓ *With 'Kofax'* : like Article, by default, it does not list any folder. When Kofax has

some actions or added language, etc all folders will be listed with names: exo:actions, languages, and more.




With some documents like Podcast or office documents, you can not view the content directly. You must download it, then use suitable application to view the content.

k) Overload Thumbnails

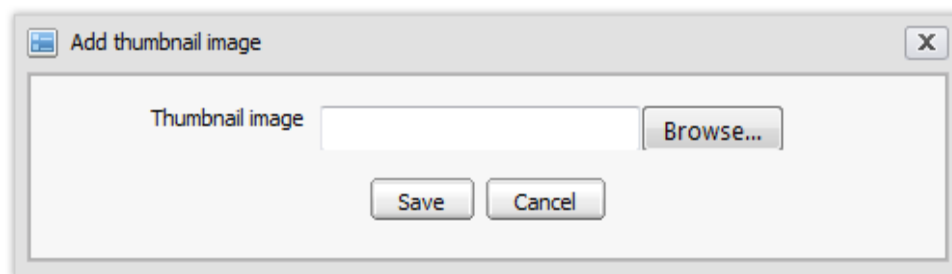
You can easily overload a thumbnail image for a folder.

Do the following steps:

Step 1: Select a folder that you want to overload a thumbnail image.

Step 2: Click  Overload thumbnail on the Action bar:

The **Add thumbnail image** form appears:

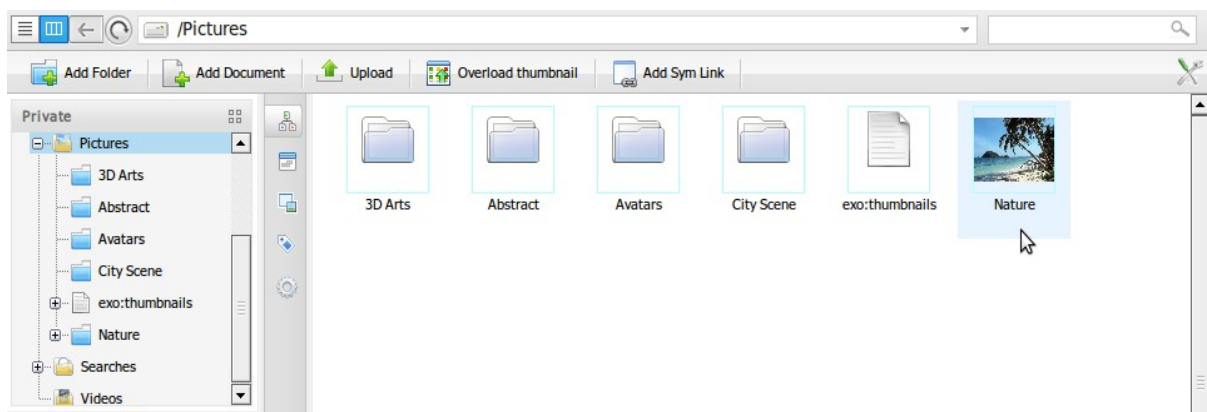


The dialog box titled "Add thumbnail image" has a close button (X) in the top right corner. It contains a text field labeled "Thumbnail image" followed by a "Browse..." button. At the bottom, there are "Save" and "Cancel" buttons.

Illustration 56: The Add thumbnail image form

Step 3 Click **Browse...** button to select an image used as a displaying icon for the selected folder.

Step 4 Click **Save** to complete adding a thumbnail image. The node will be stored in a exo:thumbnails folder.



3.3.4.4 Manage Documents in Sites Explorer

a) Create a new document

There are several types of a document: File, Article, Podcast, Sample node, File Plan, Kofax.

See the table below to know what nodes that a document type can be added into (just see the rule in vertical):

	File	Article	Podcast	Sample node	File Plan	Kofax document	Content folder	Document folder
File	o	o	o	o	o	o	o	o
Article	o	x	o	x	x	o	o	x
Podcast	o	o	o	o	o	o	o	o
Sample node	o	x	o	x	x	o	o	x
File Plan	o	x	o	x	o	o	o	o
Kofax	o	o	o	o	o	o	o	x
Uploaded file	o	o	o	o	o	o	o	o
Content folder	o	o	o	o	x	o	o	x
Document folder	o	x	o	x	o	o	o	o

Note:

“o”: The corresponding document can be added into.

“x”: The corresponding document can not be added into.

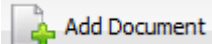
Follow the horizontal, you will know what the node can be added into.

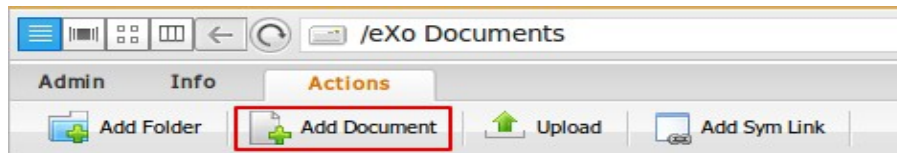
Follow the vertical, you will know what the node can include.

The process to create a new document is similar. You have to open the **Add New Document** form, then choose a specific document type (template) that you want to create.

- ✓ To create a new document, do the following steps:

Step 1: Select a folder from the left panel that you want to create a new document.

Step 2: Select the **Actions** tab, then click the button .




Step 3: Select the document type (template) that you want to create from the drop-down list (Article is selected by default).

Each document (except Article document) must be added categories when being created.

- ✓ To add categories for a document do as follows:

Step 1: Open the **Add Categories** form. See how to do this step [here](#).

Step 2: Click  to open a form to add categories for a document.

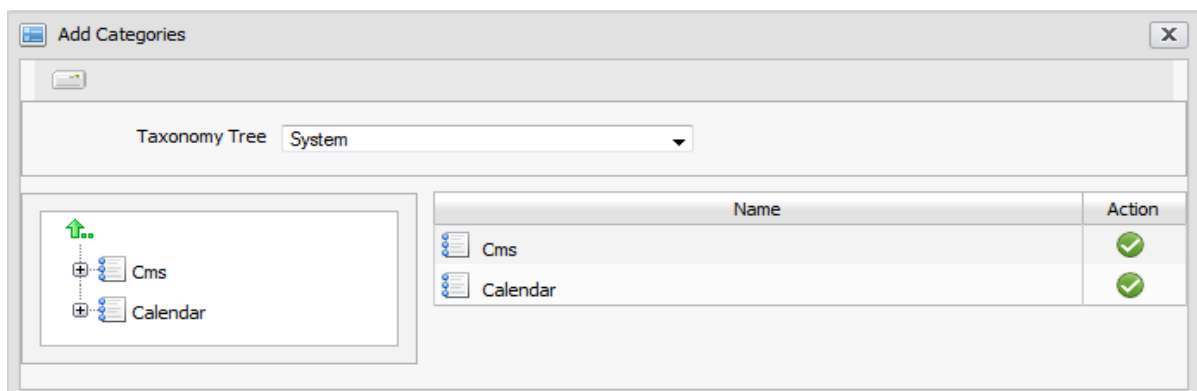


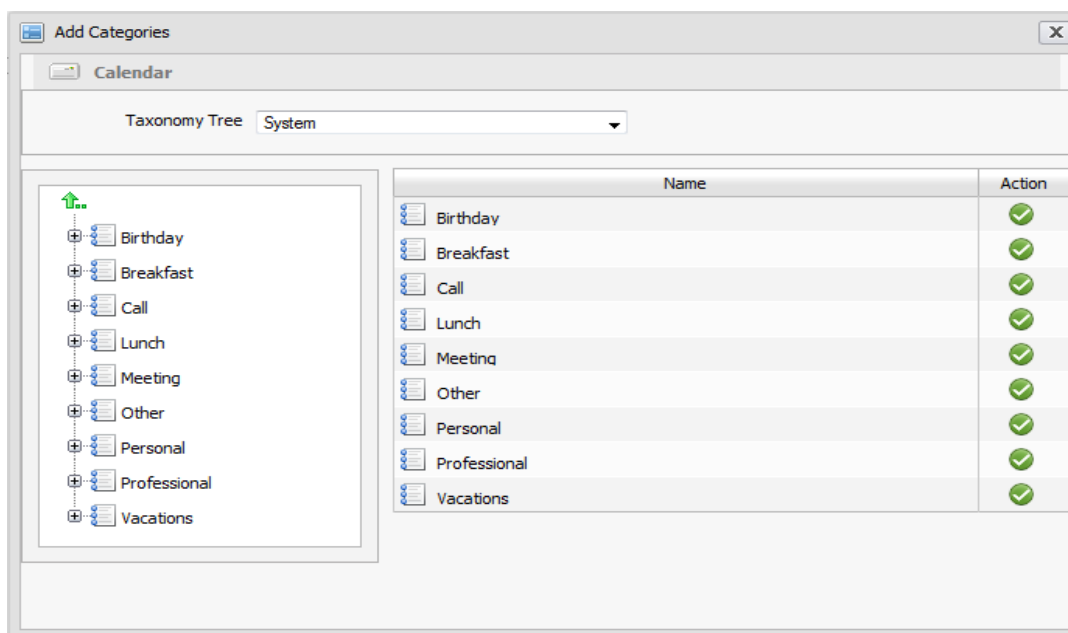



Illustration 57: The Add Categories form


Step 3 Select categories by clicking the icon . Click  to open child nodes of categories (in the below screenshot, calendar is selected).



Name	Action
Birthday	✓
Breakfast	✓
Call	✓
Lunch	✓
Meeting	✓
Other	✓
Personal	✓
Professional	✓
Vacations	✓



You can add more categories for a file by clicking  again to open the 'Add Categories' form.

Click the icon  to delete category in the Add document form.

You also manage categories which added for a file by using the Manage Categories function. For more information, see [here](#)

Create a new File document

Step 1: Follow [these steps](#) to open the **Add New Document** form, then select **File** from the drop-down list.

The **Add New Document** form will be displayed like the following illustration:

Illustration 58: The Add new File document form

(*): required

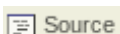
Step 2: Input name for file document in the **Name** field. Some special characters can not be used in the **Name** field: @ # % & * () " ' : ; [] { } / !


Step 3: Click the icon  to see the **Mime Type** list and select one. There are two types of File document for you to choose:

- **text/html:** when creating a text/html File document, you can input value in the **Content** field like source code (HyperText Markup Language HTML). After being created, it will generate the content you want, then you can see both the inputted source code and the generated content in that document.
- **text/plain:** after being created, it will display exactly what you inputted in the **Content** field.html.

Step 4: Input a value in the **Content** field.

- **text/html:**

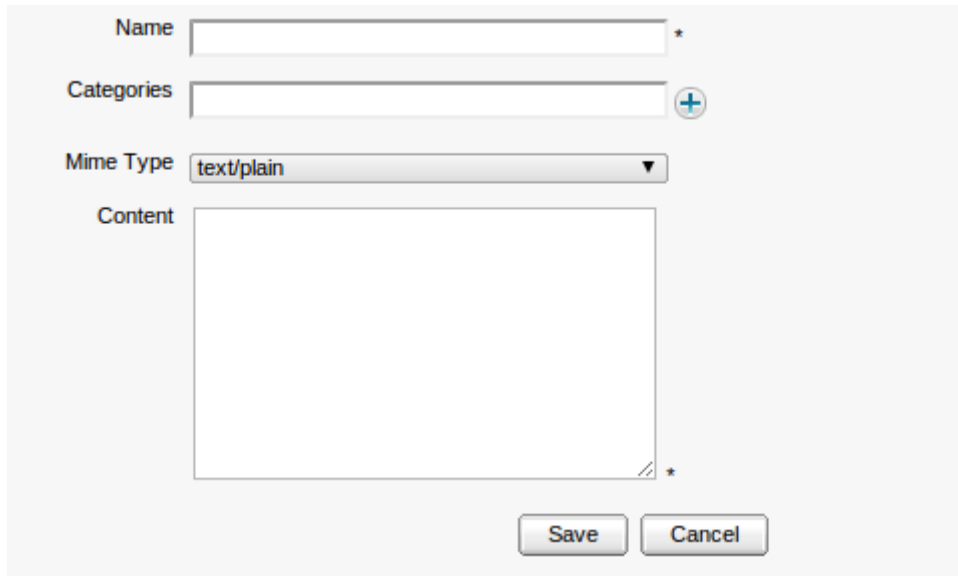
If you want to create a File document with a source code and generated content, click the icon  in the editor bar. In this mode, only Save, New Page,

Preview icons in editor bar are visible for using. Click the icon  to preview the

generated content.

- Text/plain:

If you select text/plain type, the content field will be displayed like the following illustration:



The screenshot shows a form for creating content. It has four main fields: 'Name' with a text input and a required field asterisk; 'Categories' with a text input and a plus icon; 'Mime Type' with a dropdown menu currently showing 'text/plain'; and 'Content' with a large text area and a required field asterisk. At the bottom right are 'Save' and 'Cancel' buttons.

Step 5: After inputting all required fields, click **Save** to accept creating a new file document or **Cancel** to quit without saving changes.

After being created successfully, a file document with type text/html will be displayed like the illustration below:

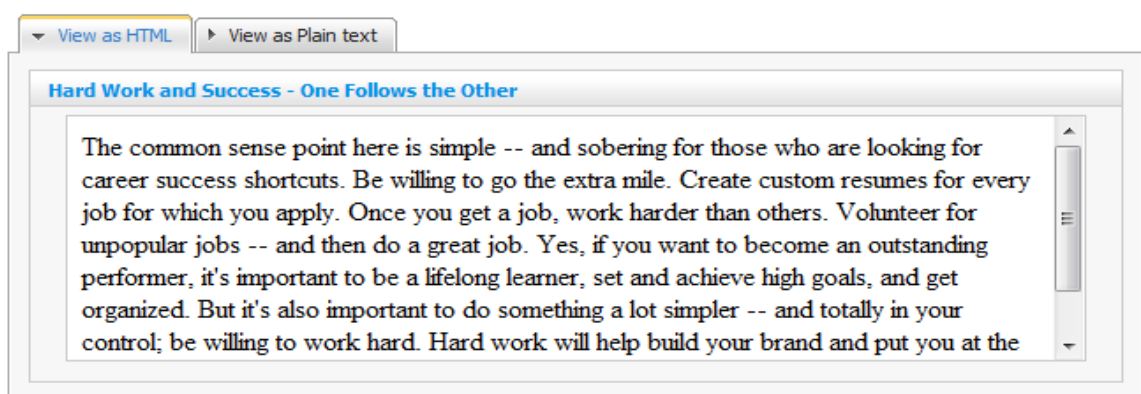


Illustration 59: The View as HTML tab

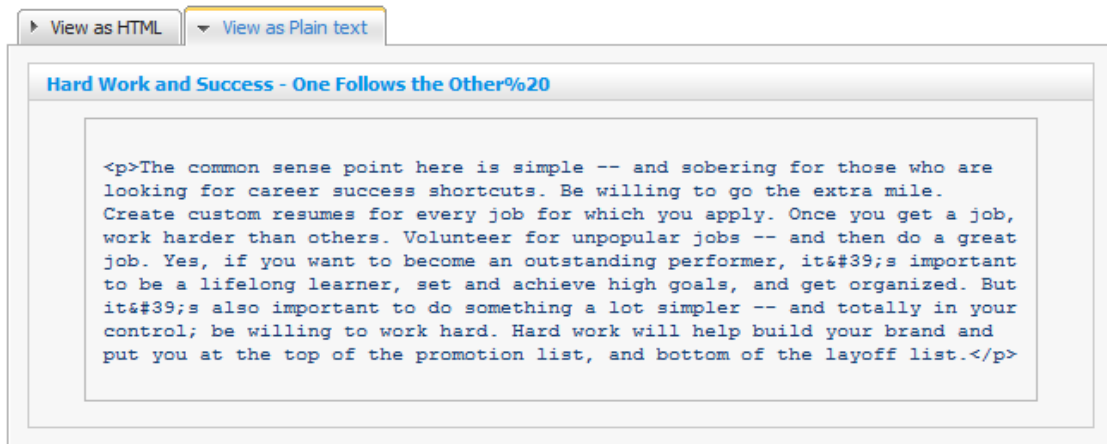


Illustration 60: The View as Plain text tab

Create a new Article

Step 1: Follow [these steps](#) to open the **Add New Document** form, then select **Article** from the drop-down list. (Actually, Article is selected by default).

The **Add New Document** form will be displayed like the following illustration:

The screenshot shows a web form for adding a new article. It has a light gray background. At the top, there are two input fields labeled 'Name' and 'Title', each with a small asterisk indicating a required field. Below these is a section labeled 'Summary' on the left. To its right is a rich text editor with a toolbar containing icons for source, bold, italic, underline, text color, background color, bulleted list, numbered list, link, unlink, and image. Below the toolbar are dropdown menus for 'Style', 'Format', 'Font', and 'Size', followed by a large text area. Below the 'Summary' section is another section labeled 'Content' on the left. To its right is another rich text editor with a similar toolbar and dropdown menus, followed by a large text area. At the bottom center of the form are two buttons: 'Save' and 'Cancel'.

Illustration 61: Add New Article form

Step 2: Input the name and the title of the Article in the **Name** and **Title** field, some special characters can not be used in the **Name** field (@ # % & * () " ' : ; [] { } / !).

Step 3: Input value for the **Summary** field, and the **Content** field.

Step 4: Click **Save** to accept the inputted values, or **Cancel** to quit.

After being created, new added Article document will be like the illustration below:

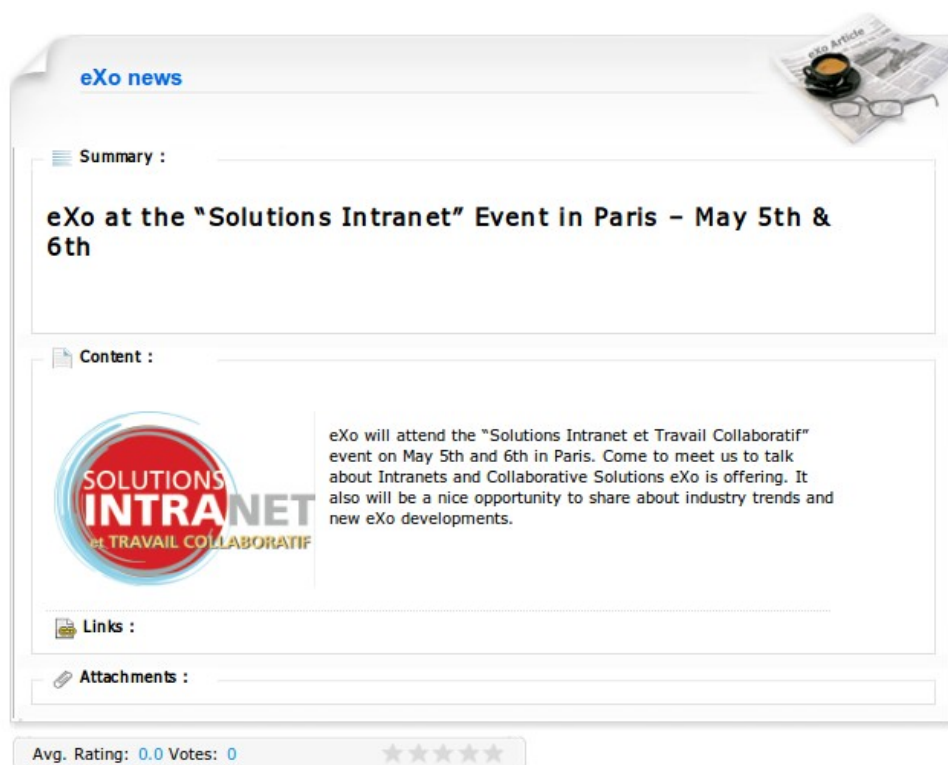

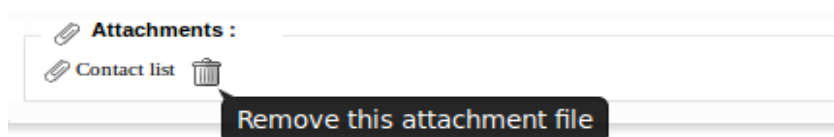


Illustration 62: An example of an Article

The **Links** is used to list all its related documents . After adding relations for a document, Article will be displayed. You can click these links to view a content of the related documents.

The **Attachments** is used to list all its uploaded files/documents that is attached with the Article. You can remove the attachments by clicking the icon  .



You can learn how to attach files to a document [here](#).



Document name can be the same with the existing one. When a new document is created with the same name as other existing document, its name will be added an index (e.g: test [2])

Create a new Podcast

Do as follows:

Step 1: Follow [these steps](#) to open the **Add New Document** form, then select **Podcast** from the drop-down list.

Add New Document

Select Template: Podcast

Name: *

Categories: +

Title:

Link: *

Author:

Explicit: No

Category:

Keyword:

Publish Date: 05/19/2010 08:55:04

Description:

Upload File: Choose File No file chosen

Mime Type: audio/mp3

Length:

Save Cancel

Mime Type dropdown options:

- audio/mp3
- audio/mp3
- audio/x-m4a
- video/mpeg
- video/x-m4v
- video/quicktime

Illustration 63: The Add new Podcast document form


The **Add New Podcast** form will be displayed like the following illustration:

(*): Required

Details:

Name	The name of a document. This field is required. Some special characters are not allowed to input in the Name field(@ # % & * () " ' ; [] { } / !)
Title	The title of a document
Categories	Categories of a document
Link	The link to the source path of the uploaded media file. This field is required
Author	The author of the uploaded media file

Explicit	It is used to indicate whether or not your podcast contains an explicit material. There are two option: <ul style="list-style-type: none">• Yes: an "explicit" parental advisory graphic will appear next to your podcast artwork• No: you see no indicator – bank is default advisory type
Category	The category of the uploaded media file, example: music, film, short clip, etc
Keyword	Keyword allows you to search your podcast files more quickly. You can use commas to separate between keywords
Publish date	The date when an episode was released
Description	Information about the uploaded media file
Mime type	The type of the uploaded media file
Length	The length of the uploaded media file

Step 2: Input values for fields. To upload a media file, click the **Browse...** button and select the media file from your machine. After that, click  next to the **Browse...** button.

Step 3: Click **Save** to finish, or **Cancel** to quit without saving changes.



A document name can be the same with the existing one. When a new document is created with the same name as existing document, its name will be added an index (e.g: test[2]).

After being created, a Podcast will be displayed:

Podcast: Sad Angel
Title: Sad Angel
Link: youtube
Author: Igor Krutoi
Explicit: no
Category: Piano
Keywords: Instrumentals
Publish date: April 16 2010
MimeType: audio/mp3
Length:
Description: An amazing piano melody
Avg. Rating: 0.0 Votes: 0 ★★★★★

Illustration 64: The screen of a Podcast

You can listen to a podcast immediately on your computer or transfer them to your audio player and enjoy later.

Create a new Sample node

Do as follows:

Step 1: Follow [these steps](#) to open the **Add New Document** form, then select **Sample node** from the drop-down list.

The **Add New Sample node** form will be displayed like the following illustration:

Name *

Categories +

Title *

Description

Date

Date time

Upload image No file chosen

Mime Type

Summary

Content

Illustration 65: The Add new Sample node form

(*) required

Step 2: Input values for fields.**Step 3:** To upload an image, click the **Browse...** button and select an image from your

Node name sample-node

Title Sample node


Date May 19 2010

Date time May 21 2010 09:31:39

Description

One of the best coffeshop in Hanoi

Image



Summary

A funky new cafe that can be a challenge for some to find.


Content

Tucked away in an alley off the busy Old Quarter street of Ma May. This place has great and reaxing athmosphere to enjoy coffee with friends.

Relations

- Best spots in Hanoi .odt

Attachments

- Hanoi tourguide.png 

Avg. Rating: 0.0 Votes: 0




Illustration 66: The screen of a Sample node

The **Relations** area is used to list all its related documents. [See here](#)

You can click the links to view content of the related document.

The **Attachments** area is used to list all its uploaded files. See how to attach files to document [here](#)

Create a new File Plan

Do as follows:

Step 1: Follow [these steps](#) to open the **Add New File Plan** form, then select **File plan**

from the drop-down list.

The **Add File plan** form will appear like the following illustration:

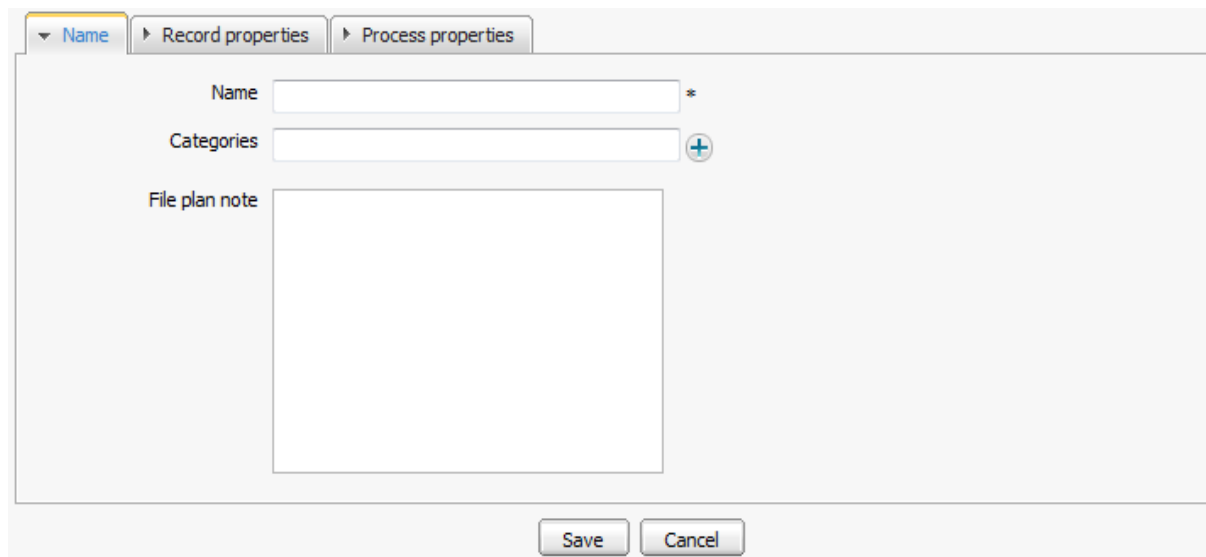



Illustration 67: The Add new File Plan form

Details:

(*) *required*

■ The **Name** Tab:

Name	Name of the file plan.
Categories	The categories of your file plan. Select the categories for your file. plan by clicking the button  .
File Plan note	Note for presenting any other handling information for users.

The **Record properties** Tab:

The screenshot shows the 'Record properties' tab with the following fields and values:

- Record category identifier: [Empty text input]
- Disposition authority: [Empty text input]
- Permanent record indicator: [True]
- Disposition instructions: [Empty text area]
- Contains records folder: [True]
- Default media type: [Electronic]
- Default marking list: [None]
- Default originating organization: [Empty text input]
- Vital record indicator: [True]
- Vital record review period: [One Minute]

Illustration 68: The Record properties tab

Details:

Record category identifier	The alphanumeric or numeric identifier indicating a unique record category. This must be a unique ID and if left blank will be created automatically by the system.
Disposition authority	A reference number to the regulations that govern the disposition.
Permanent record indicator	A type of record indicators which should never be deleted.
Disposition instructions	A readable guidelines on how the records associated with the file plan will be handled.
Contains records folder	The confirmation is about whether the records folder is contained or not.
Default media type	The choice for preset media types which are made available to simplify the data entry for the record. The frequently-chosen value is "electronic" or paper.
Default marking list	Handling and classification information that are printed at the bottom of the record, such as UNCLASSIFIED or NOCONTRACT.
Default originating organization	This option is to enter the original arrangement as default which is made available to simplify the data entry for the record and to assume that originating organizations are the same for the information in the file plan.

Vital record indicator	This flag is to allow whether tracking or reminding you of the record as essential or not.
Vital record review period	The choice for the interval of time between vital record reviews.

■ The **Process Properties** tab:

The screenshot shows the 'Process properties' tab in a software interface. It contains several configuration fields:

- Process cutoffs: True *
- Event trigger: *
- Cutoff period: One Minute
- Cutoff on obsolete: True
- Cutoff on superseded: True
- Process hold: True *
- Hold period: One Minute
- Discretionary Hold: True
- Process transfer: True *
- Default transfer location:
- Transfer block size:
- Process accession: True *
- Accession location:
- Accession block size:
- Process destruction: True *

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

Illustration 69: The Process properties tab

(*): required


- Process cutoffs: The boolean datatype is used to break a process. If the process cutoff flag is set in the file plan, the record is cutoff after the expiration, or after it has been obsolete or superseded, depending on the information in the file plan.
- Event trigger: The text datatype is an automatic executing code which is used to tell the event to perform some actions.
- Cutoff period: The duration for the record cutoff performance.
- Cutoff on obsolete: The record is cutoff when it is obsolete.
- Cutoff on superseded: The record is cutoff when it is removed or replaced.
- Process hold: This boolean datatype is used when a record process may be held before the further disposition is handled.
- Hold period: The duration when a record may be held after cutoff which is normally measured in Years.

- Discretionary Hold: The boolean datatype is used when a hold may be discretionary, such as after a command change. So, the discretionary hold flag allows the records management module to track these manual checks.
- Process transfer: The boolean datatype is used to determine how a record process will be transferred.
- Default transfer location: The text datatype is used to determine where a record is transferred by default.
- Transfer block size: The float datatype is used to determine in what size blocks for organizational purposes that is normally measured in Years.
- Process accession: The boolean datatype is flagged when a record which is held permanently must be ultimately transferred to the national records authority.
- Accession location: The text datatype is flagged to specify an area for the accession transfer.
- Accession block size: The text datatype is flagged to determine the blocks size for organizational purposes which is normally measured in Years.
- Process destruction: The boolean datatype is flagged if there is any record to be destroyed. After that, the record is marked in the Alfresco system to be permanently destroyed so that all information, metadata and physical traces are removed and cannot be recovered.

Step 2: Input values into these fields.

Step 3: Click **Save** to accept, or **Cancel** to quit.

After being created, the new File Plan will be displayed:

 **File Plan Content:** new File Plan

Record Category Identifier	
Disposition Authority	
Disposition Instructions	
Permanent Record Indicator	true
Contains Records Folder	true
Default Media Type	Electronic
Default Marking List	NONE
Default Originating Organization	
Number of Records	0

▼ Records

► Obsolete Records

► Superseded Records

► Vitals Records

◀ ▶

Record Id

Record name

Originator

Date Received

Originating Organization

Illustration 70: The screen of a File Plan

Create a new Kofax

Do as follows:

Step 1: Follow [these steps](#) to open the **Add New Kofax** form, then select **Kofax document** from the drop-down list.

The **Add New Kofax** form will be displayed like the following illustration:

The screenshot shows a window titled "Add New Document". Inside, there is a "Select Template" dropdown menu with "Kofax document" selected. Below this, there are two input fields: "Name" (marked with an asterisk) and "Categories" (with a plus icon). At the bottom, there are "Save" and "Cancel" buttons.

Illustration 71: The Add New Document form with the Kofax template

(*): required.

Step 2: Input a name for a Kofax document in the **Name** field. This field is required. Some special characters can not be used in the **Name** field(@ # % & * () " ' : ; [] { } / !).

Step 3: Select categories for a Kofax document by clicking .

Step 4: Click **Save** to accept, or **Cancel** to quit.

After being created, a kofax document will be displayed like this illustration:

The screenshot shows a window with two tabs: "File view" and "Document view". The "Document view" tab is active. It displays a table with the following content:

Kofax document name	new kofax document
---------------------	--------------------

Below the table, there is a rating section with five stars and the text "Avg. Rating: 0.0 Votes: 0".

The **File View** tab is used to display all added nodes in that kofax. Besides, all added files in kofax are also displayed in the **Document View** tab:

The screenshot shows a window with two tabs: "File view" and "Document view". The "Document view" tab is active. It displays a table with the following content:

Kofax document name	new kofax document
Downloadable file #1	system guide.pdf
Downloadable file #2	BC config.gif

Below the table, there is a rating section with five stars and the text "Avg. Rating: 0.0 Votes: 0".

Illustration 72: The Kofax Document view tab

Create new Event

Do as follows:

Step 1: Follow [these steps](#) to open the **Add New Event** form, then select **Event** from the drop-down list.

The **Add New Event** form will be displayed like the following illustration:

The screenshot shows the 'Add New Event' form. At the top, there is a 'Select Template' dropdown menu with 'Event' selected. Below this, the form contains several input fields: 'Title' and 'Name' are required (marked with an asterisk), 'Language' is a dropdown menu currently set to 'en', 'Location' is required, 'Start date/time' and 'End date/time' are date pickers both showing '05/21/2010', 'URL' is an optional text field, 'Summary' and 'Content' are larger text areas. A 'Google Maps ?' checkbox is located between the 'Location' and 'Start date/time' fields. At the bottom right, there are 'Save' and 'Cancel' buttons.

Illustration 74: Add New Event form

(*): required

Step 2: Input Title for the event.

Step 3: Input the location where the event will take place in **Location** field. Check the Google Maps checkbox if you want the location of the event shown on Google Maps.

Step 4: Input the **Start** and **End Date/time** of the event.

Step 5: Fill the **Summary** and **Content** filed.

Step 6: Click **Save** to finish, or **Cancel** to quit without saving changes.

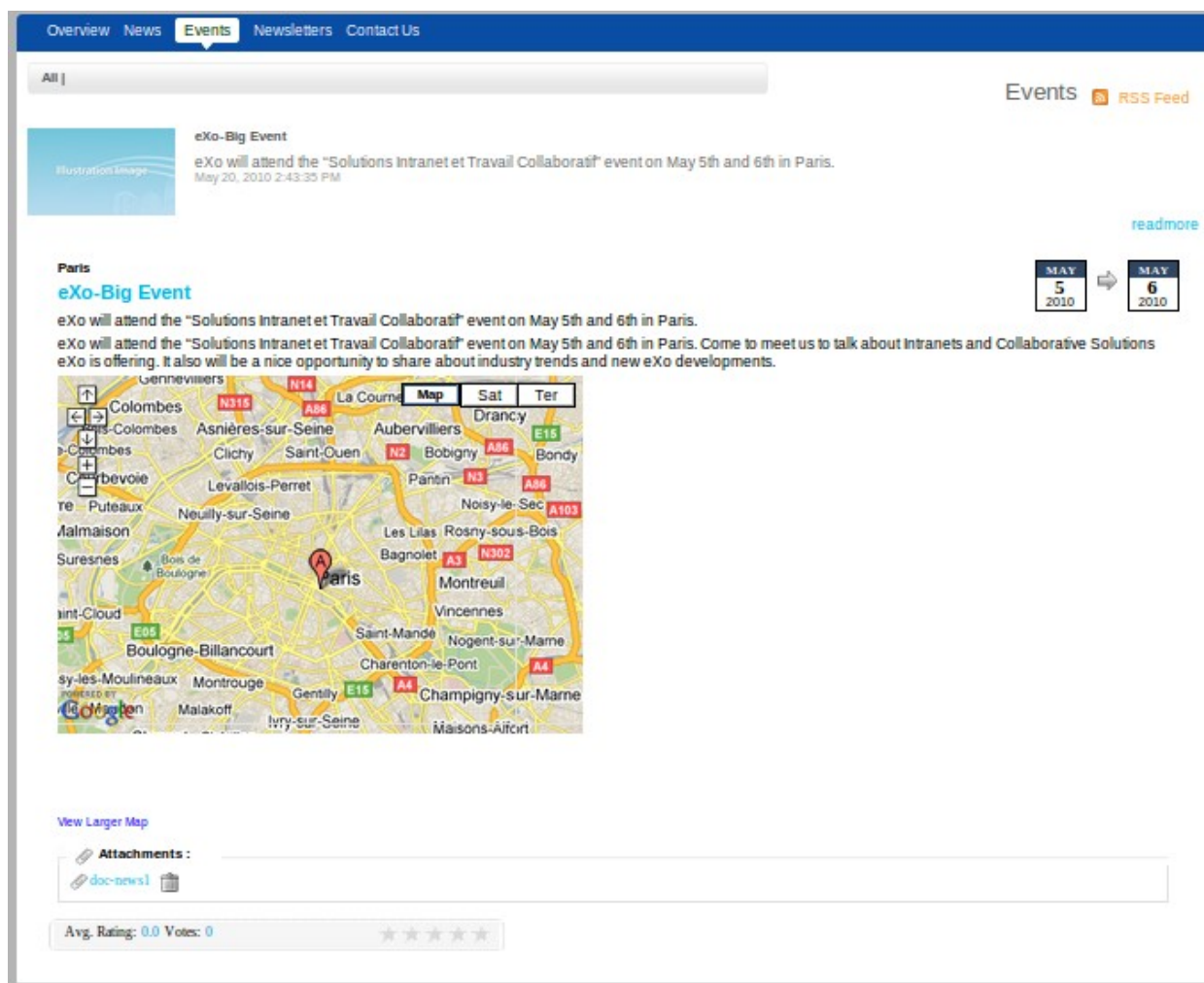
After being created, the event will be displayed like the illustration bellow:

Paris

eXo-Big Event


eXo will attend the "Solutions Intranet et Travail Collaboratif" event on May 5th and 6th in Paris.

eXo will attend the "Solutions Intranet et Travail Collaboratif" event on May 5th and 6th in Paris. Come to meet us to talk about Intranets and Collaborative Solutions eXo is offering. It also will be a nice opportunity to share about industry trends and new eXo developments.

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eXo-Big Event

eXo will attend the "Solutions Intranet et Travail Collaboratif" event on May 5th and 6th in Paris.
May 20, 2010 2:43:35 PM

[read more](#)


Paris






eXo-Big Event

eXo will attend the "Solutions Intranet et Travail Collaboratif" event on May 5th and 6th in Paris.
eXo will attend the "Solutions Intranet et Travail Collaboratif" event on May 5th and 6th in Paris. Come to meet us to talk about Intranets and Collaborative Solutions eXo is offering. It also will be a nice opportunity to share about industry trends and new eXo developments.

[View Larger Map](#)

Attachments :

doc-news1 

Avg. Rating: 0.0 Votes: 0     

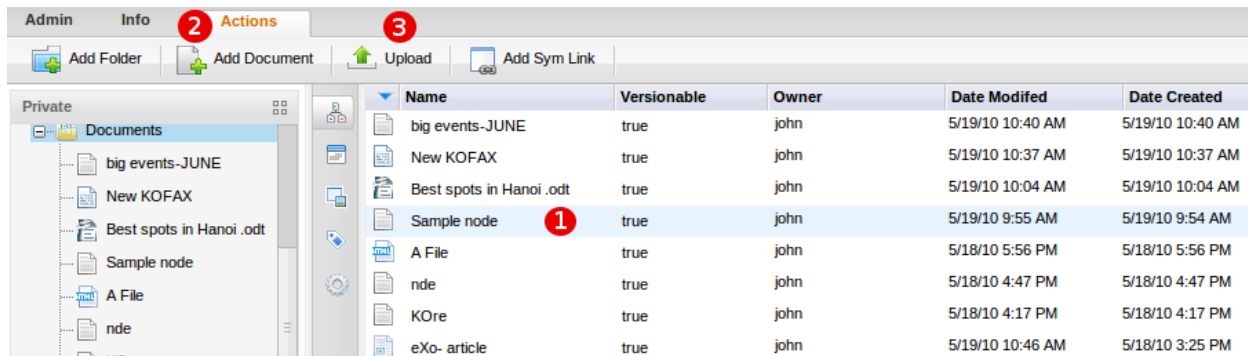
That's how this event will be displayed on a website:

b) Attach files to a document

Do as follows:

Step 1: Select a document that you want to attach files, then click from the **Actions** tab:





Step 2: The **Upload** file form will appear:

Step 3: Input the file name in the Name field.

Step 4: Click **Choose File** to select your attachment. You can also click **+** to select another file to upload.

Step 5: Click **Save** to attach your files or **Cancel** to quit without changes.

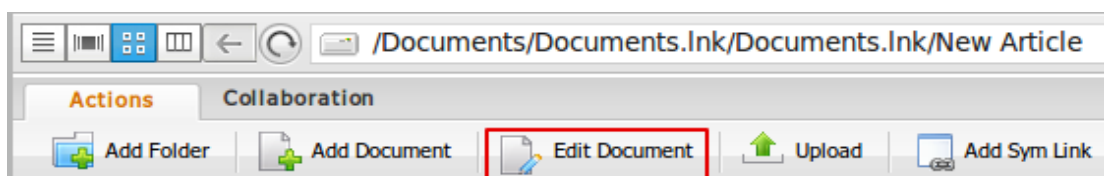
c) Edit documents

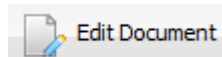
There are two ways to edit a document:

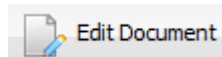
Do as one of follows:

The 1st ways: Select the document that you want to edit on the left panel.

Step 1: Select the **Actions** tab to show available actions on the Action bar.





Step 2: Click the  on the Action bar.

The 2nd way: Select a folder that contains the document you want to edit.

Step 1: Right-click the document you want to edit and select **Edit** from the menu.

The **Edit Document** form will appear. All information of the selected document will be displayed in this form and ready for you to change except the **Name** field.

Step 2: Click **Save** to save new changes.

d) Delete documents

Do as follows:

Step 1: Select a document that you want to delete on the left panel.

Step 2: Right-click the document, and select **Delete** from the menu.

Step 3: Click **OK** in the confirmation message to accept, or **Cancel** to quit.

By moving the cursor on the document name and then right-click that document, there will be a menu that includes main basic actions on documents.



*You can select multiple nodes by holding the **Ctrl**, **Shift** key and select nodes or move mouse over nodes. By using this feature, you can take some actions (copy, cut, delete, lock/unlock) on different nodes at the same time.*

e) Copy/Paste documents

This function is used to make a copy of a document (include sub nodes) in other places. There are two ways to cope/paste documents:

The 1st way: Copying/Pasting documents from the menu

Do as follows:

Step 1: Right-click a document then select the **Copy** from the menu.

Step 2: Select a destination node that you want to make a copy

Step 3: Right-click the node you want to be the parent node of the copied node and select the **Paste** item in the menu. Note that the **Paste** function is enable in the menu only after selecting the **Copy/Cut** action.

Step 4: The copied document (and its sub nodes) will have a copy in a new selected path.



- You only can take the **Copy/Paste** action if you have a right on the source node.
- If the destination node has the same name with the copied node, after being pasted, the copied node will be added an index with its name.
- After taking the **Copy** action, you can paste that node on different nodes before taking the new

Copy or Cut action.

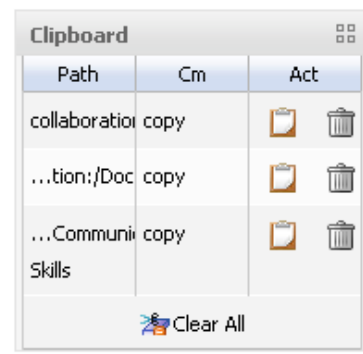
The 2nd way: Copying/pasting folders from the Clipboard


Do as follows:


Step 1: Right-click a document and select the **Copy** from the menu.

Step 2: Select the destination node (a folder or a document) that you want to make a copy.

Step 3: Select the **Clipboard** icon  :



Step 4: Click  to paste the copied node into the selected destination node in step 3.

Step 5: You can click the  icon to delete a specific waiting statement.

Step 6: You can also click the **Clear All** link to delete all waiting statements in the list.

There is a message with the destination path or detailed reason after taking the **Paste** action.



- You can do the **Copy/Paste** action only when you have the right on the source/destination node
- If the destination node contains a same named node with the copied node, after being pasted, the copy will be added an index after its name.
- If there are more than one **Copy/Cut** action on 1 folder, in Clipboard only the nearest action is listed waiting for **Paste**.
- If you delete the copy pending statement from the Clipboard, the **Paste** action in the right-click menu also be deleted.

f) Cut/Paste documents

There are also two ways to cut/paste documents from one place to an another place.

The 1st way: Cut/Paste documents from the menu

Do as follows:

Step 1: Right-click a document and select the **Cut** from the menu.

Step 2: Select a path to the destination node (a folder or a document).

Step 3: Right-click the node that you want to paste the cut document and select the **Paste** item in the menu. The **Paste** function is enable in a menu only after selecting the **Copy/Cut** action.

Step 4: The selected document (and its sub nodes) will be removed to the new selected path.

The 2nd way: Cut/Paste documents from the Clipboard

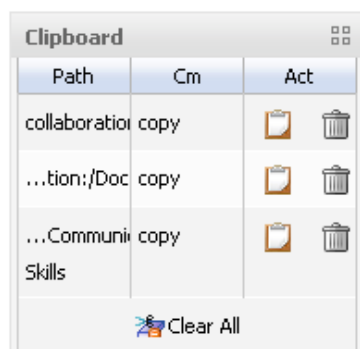
Do as follows:

Step 1: Right-click a document and select Cut from the menu.


Step 2: Select a path to the destination node you want to move to

Step 3: Select the **Clipboard** icon  :

There is a list of all copying/cutting actions waiting for being pasted.



Step 4: Click  to paste the cut node into the selected destination node in step 3.

Step 5: You can click the  icon to delete specific waiting statement.

Step 6; You can also click the **Clear All** link to delete all waiting statements in the list.

There will be a message with a destination path or detailed reason after taking the **Paste** action.



- You can do the **Cut/Paste** action only when you have the right on the source/destination node.
- If the destination node contains a same named node, after being pasted, the cut node will be added


an index after its name.

- *If there are more than one **Copy/Cut** action on one folder, only the most recent action is listed in the Clipboard.*
- *After performing the **Paste** action, the waiting cut statement will be removed automatically.*
- *If you delete the cut waiting statement from the Clipboard before paste, the **Paste** action in the right-click menu also be deleted.*

g) Drag and Drop documents

This function allows you to move a document from a specific location to another one by using the drag and drop feature.

Do as follows:

Step 1: Move a cursor on a document or documents (To select multiple documents at once: hold the **Ctrl** key and select documents) on the right panel till the cursor change to .

Step 2: Press the left mouse and then drag the selected documents to another folder on the right or left panel.

Step 3: Drop them to the selected folder. All dragged documents will be moved to the destination folder.

h) Lock/Unlock documents

This function supports you to avoid changes on a specific document by others in a specific time.

Lock document

To lock document, do as follows:

Step 1: Select the path to the document that you want to lock or select the document on the left/right panel.

Step 2: Right-click that document and select **Lock** from the menu:

Step 3: After this action, the document is locked, only you are allowed to make changes on this document.



- *Only users who has a right can take this action.*
- *Others can only view document after it has been looked.*
- *The lock status can be kept in your current session only, if the you sign out, the node will be unlocked automatically.*
- *Other users can make a copy of a locking node in other places by doing Copy and Paste it into another node but users can not remove it or perform others actions.*
- *If you lock the document but do not perform any action on it, after 30 minutes, it will be unlocked automatically.*

Unlocking documents

After a document has been locked, when right-click it, the **Unlock** item in the menu will be enabled only when a document is being locked. Select it and the locked document will be unlocked. After that, others can take actions on it.

i) Rename documents

This function is used to change the name of a folder.

To rename document, do as follows:

Step 1: Right-click a document and select the **Rename** item in the menu.

The **Rename** form will appear:

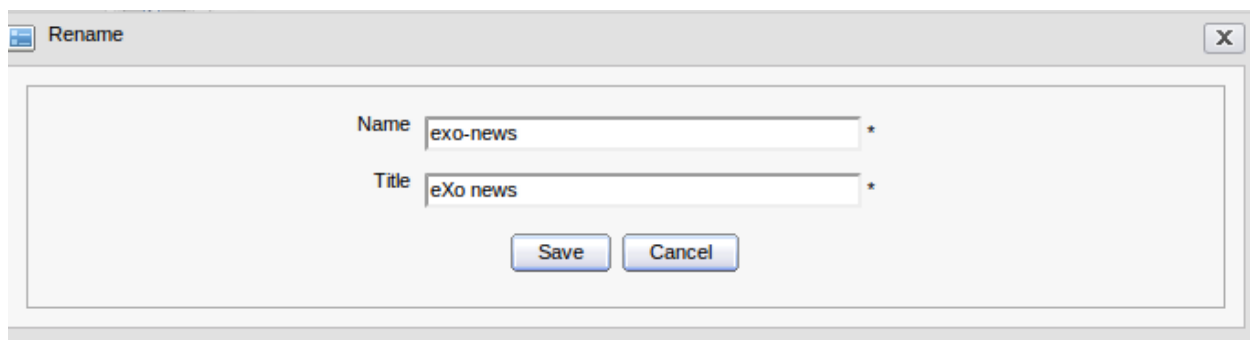


Illustration 75: The Rename form

Step 2: Input a new name for this node in the **Name** field. You can also change the title of this document by inputting new one in the **Title** field.

Step 3: Click **Save** to accept, or **Cancel** to quit.



Renaming a document must follows rules of creating a new document:

*Some special characters can not be used in the **Name** field (@ # % & * () " ' : ; [] { } / !).*

*A document name can be the same with the existing one. When a new document is created while its name has been existing, after clicking **Save**, its name will be added an index (e.g: test[2]).*

j) Add Sym Link

You also easily add a sym link for a document for the purpose of fast accessing the document that you are looking for:

To add Sym link, do as follows:

Step 1: Select a document that you want to add a sym link.

Step 2: Right click that document and select **Add Sym Link** from the menu.

Step 3: The selected document will be added a sym link immediately. You now can

click the sym link to view its content.

k) View WebDAV

WebDAV enables people to access files, folders and read and write documents over the web. Due to its benefits of easy, quick and flexible manipulations and time saving, WebDAV is used to view nodes.

To view nodes in WebDAV, do as follows:

Step 1: Select the path of node you want to view webDAV or open that folder from the left/right panel.

Step 2: Right-click the node and select the **Download and Allow Edition** item in the menu.

Step 3: With each type of node, form to view in WebDAV will be different:

- *With folder:* sub nodes list of current folder will be displayed in WebDAV.
- *With 'nt:file':* the content of document will be shown in WebDAV.
- *With 'Article':* by default, it does not list any folder. But if Article includes some actions or added language, etc all folders will be listed with name: exo:actions, languages, and more.
- *With 'Podcast':* to view in WebDAV, there will be a form that user has to download this document.
- *with 'Sample node':* by default, it lists folder name exo:image. Like Article, if Sample node has some actions or added language, etc all folders will be listed with name: exo:actions, languages, and more.
- *with 'File Plan':* by default, it lists folder name exo:actions. If File plan has some actions or added language, etc all folders will be listed with name: exo:actions, languages, and more.
- *with 'Kofax':* like Article, by default, it does not list any folder. When Kofax has some actions or added language, etc all folders will be listed with name: exo:actions, languages, and more.



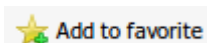
With documents like Podcast or office document, you can not view the content directly, you must download to your computer then choose the suitable application to view the content.

l) Add to favorite

This function helps users easily add nodes (documents, folders or files) as favorite.

- ✓ To add a document as your favorite, follow these step:

Right click the document that users want to add it as favorite and select

 from the menu.

There will be a symlink of your favorite nodes (folders, documents, files) will be created

in the **Favorite** folder.

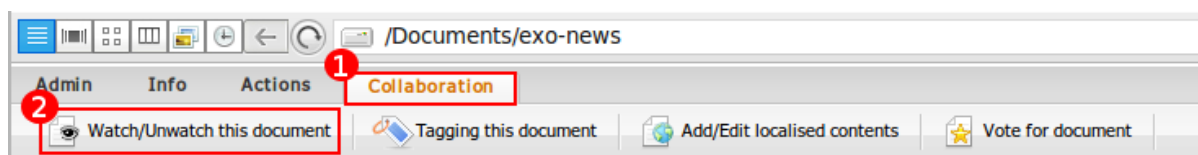
m) Watch/Unwatch documents

By using this function, whenever a change is made on the document, there will be a notification message sent to your email address. To receive that email, you must configure in your mail server.

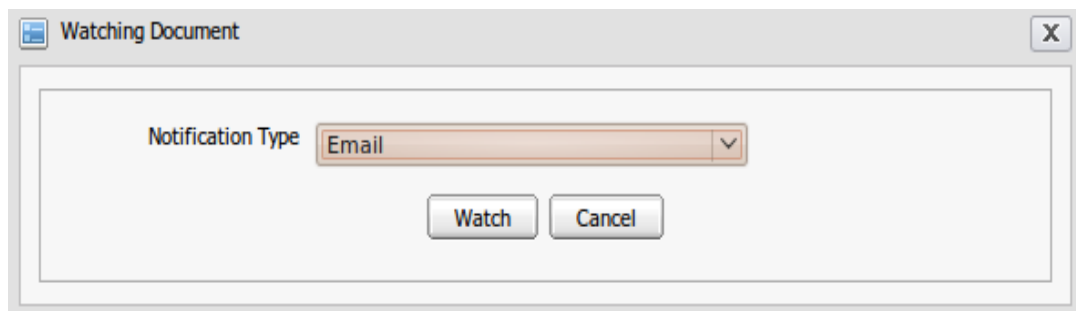
- ✓ To start receiving an email notification do as follows:


Step 1: Select the document.

Step 2: Chose the **Collaboration** tab then click  from the action bar.



Step 3: The **Watching Document** form will appear. Click the **Watch** button to finish.



- ✓ To stop receiving an email notification, select the document you want to stop watching. Then, click  again. There will be a message informing that you have just unwatched that document.


n) Add tags for documents

A tag is a (relevant) keyword or term associated with or assigned to a piece of information (a picture, a geographic map, a blog entry, a video clip etc.), thus describing the item and enabling keyword-based classification and search of information.

Add a new tag for a document

Do as follows:

Step 1: Select a document that you want to add tags.

Step 2: Chose the **Collaboration** tab then click  Tagging this document on the Action bar. The **Tag Manager** will be displayed:

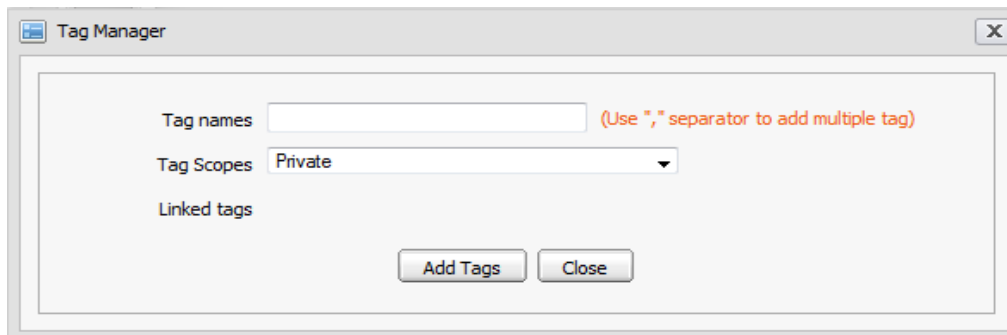


Illustration 76: The Tag Manager form

Tag names	The tag names that users want to add tags for documents.
Tag Scopes	To classify tags. There are four tag types: private, public, group, site. Currently, the two first types are activated (Private: a user who create tags can view and edit tags; public: all users can view and edit tags).
Linked tags	To list all tags of a document after you click the Add Tags button.

Step 3: Input a value for the **Tag names** field. A document can be added several tags at a time. To do that, input all tag names in the **Tag names** field and separate by “,”.

Step 4: Select a value for the **Tag Scopes** field.

Step 5: Click **Add Tags** to accept, or **Close** to quit. Only you can see this tag in this document.

Step 6: Click the icon  to delete tags that you want to.

*A tag name can not contain some special characters, including: ! @ \$ % * [] ' : \ /*




You can add multi-tags for the same documents.

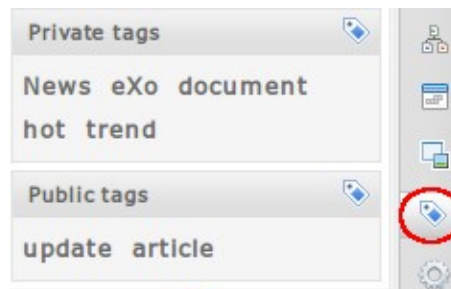
You can add multi-documents with the same named tag.

*All tags of a document will be listed in **Linked tags**.*

When you add a tag for a document, anyone can select that tag so anyone can see your document but they only can take actions on it if they have the permission.

o) Use created tags

Select the Tag cloud  icon, you will see all existing tags: All existing tags are listed and classified by private or public tags.




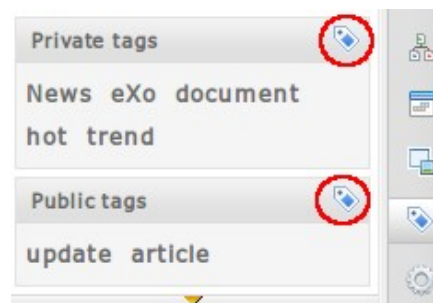
Depending on the popularity of tag, the displaying of each tag will be different from others by: font-size, font-weight, color, font-family, text-decoration. For example, when a tag is added for over 10 documents, it will be displayed in red color, size:20px, bold. This is also can be configured in WCM Administration portlet.

Each tag is also like a link used list all documents that it is added, click a tag name, documents list will be displayed in the right panel.

p) Manage tags

A user easily manage tags by editing or deleting tags. Follow these steps:

Step 1: Click  at the upper right corner of the private or public tags panel.



The **Edit tag form** will appear:

A screenshot of a dialog box titled 'Edit tag form'. It contains a table with two columns: 'Name' and 'Action'. The 'Name' column lists the tags: 'News', 'eXo', 'document', 'hot', and 'trend'. The 'Action' column contains icons for editing (pencil) and deleting (trash can) for each tag.











Name	Action
News	 
eXo	 
document	 
hot	 
trend	 

Illustration 77: The Edit tag form

Step 2: Click  that corresponds to the tag name you wants to edit.

Step 3: Change the tag name for the **Tag name** field.

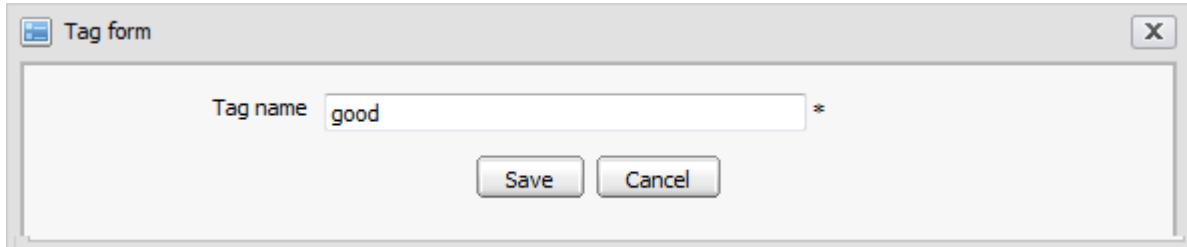

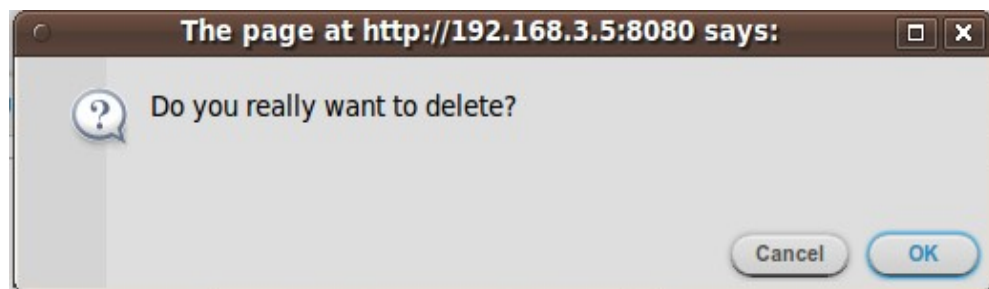
A screenshot of a web browser window showing a 'Tag form' dialog box. The dialog box has a title bar with a close button (X). Inside, there is a text input field labeled 'Tag name' containing the word 'good'. Below the input field are two buttons: 'Save' and 'Cancel'.

Illustration 78: The Tag form

Step 4: Click **Save** to accept changing a tag name or **Cancel** to close the **Tag form** without changing a tag name.

A user also can delete a tag name by clicking . A confirmation message will appear.



Click **OK** to accept deleting or **Cancel** to close this message without deleting any tag.

q) Add a language for a document

This function is used to support users to add multi-languages for a document. Each document can be displayed in many languages that are added.

Do as follows:

Step 1: Select a document that you want to add language(s).

Step 2: Select the **Collaboration** tab to show some advanced actions on the **Action** bar.

Step 3: Click  Add/Edit localised contents on the **Action** bar.

The screenshot shows the eXo user interface with the 'Collaboration' tab selected. A red circle with the number '1' highlights the 'Collaboration' tab, and another red circle with the number '2' highlights the 'Add/Edit localised contents' button. The 'Add/Edit localised contents' button is located in the top right of the Collaboration tab. Below the buttons, there is a form with a 'Language' dropdown menu set to 'English(default)'. Below the dropdown are three buttons: 'View', 'Set default', and 'Cancel'.

Illustration 79: The Multi-language form

The **Multi-language** form will appear: In the **View language** tab, there will be a list of all language for selected document. You also know what language is currently set as default for your selected document.

Step 4: Select the **Add language** tab. This tab will be displayed differently, depending on what file you selected. However, the area where you can add languages for document is the same. The below illustration shows the **Add language** tab for a **Sample node** file:

View language Add language

Language ----- ▾

Set default ☐



Title Sample node *

Name sample-node *

Description One of the best coffeshop in Hanoi

Date 05/19/2010

Date time 05/21/2010 09:31:39

Upload image  

Mime Type image/jpeg ▾

Summary A funky new cafe that can be a challenge for some to find.

Content Tucked away in an alley off the busy Old Quarter street of Ma May. This place has great and reaxing athmosphere to enjoy coffee with friends.

Save Cancel

this area is shown differently, depends on the filetype.

Illustration 80: Add language tab

Step 5: Select a language you want to add from the Language drop-down list.

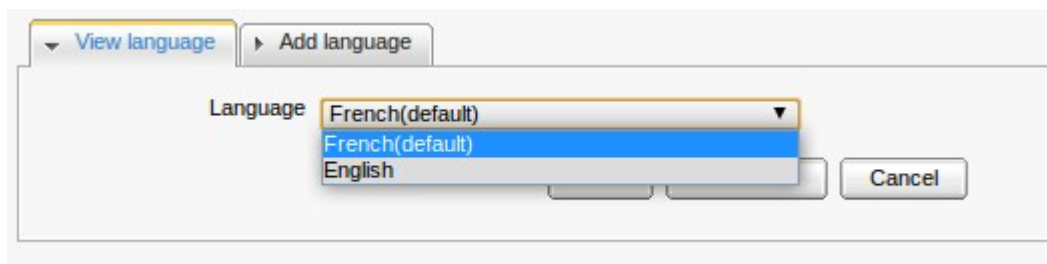
If the selected language has not been added for current document, the content field will be blank.

Select the **Set default** checkbox if you want to set your selected language as default language.

Language French ▾

Set default ☒

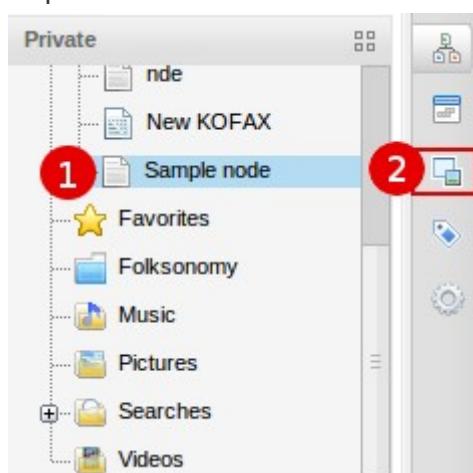
Step 6: Click **Save**, you will be back to the **View language** tab. Your selected language is now added into the **Language** field:



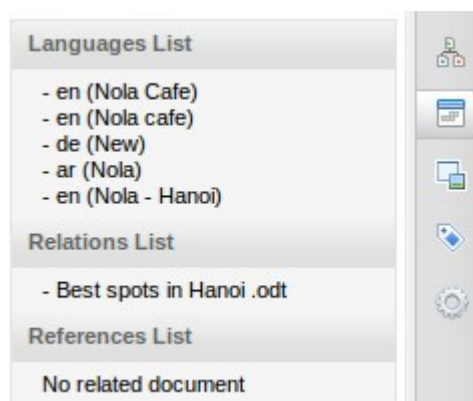
You can view this document in new added language by selecting the language from the language drop-down list then click the **View** button.

- ✓ To view the languages list of a document, do as follow:

Step 1: Select a document that you want to view the language list then click the **Relation** button on side panel:



Step 2: The list of language (and all related documents) will be displayed on the left panel:



You can view the document in the new language by clicking the corresponding link in **Languages List**.

For more details about **Relations**, see [here](#)



You cannot add multiple languages for a File Plan.

When a document is a sub-node of File Plan, you also cannot add language to it.

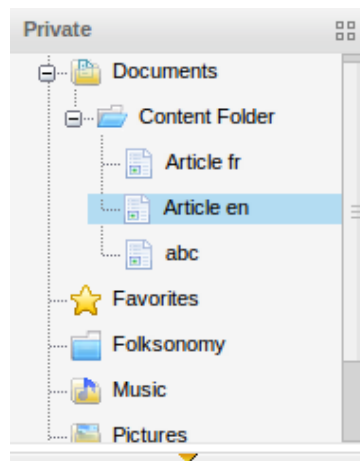
r) Add translation to a document.


This function is used to support users to add multi-languages for a document. It's similar to the Add language function but more flexible.

By default, the **Add translation button** is not displayed on the toolbar. You have to enable this function by going to **Sites Administration | Content Presentation | Manage Views**

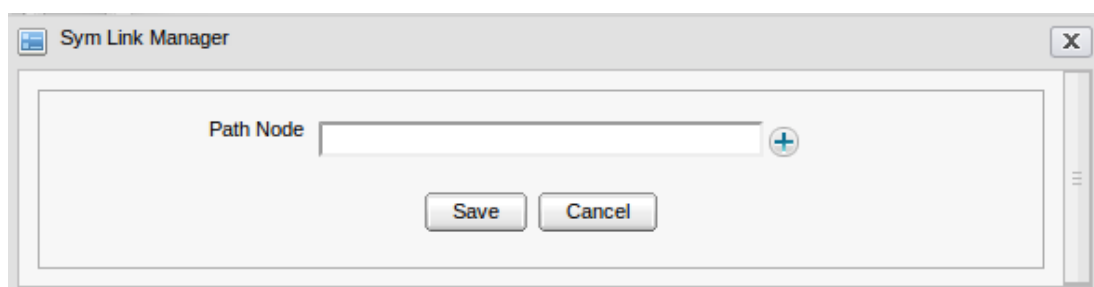
- ✓ To add a translation to the document, do as follows:


Step 1: Select the document you want to add the translation. For example, select an Article which is in English:

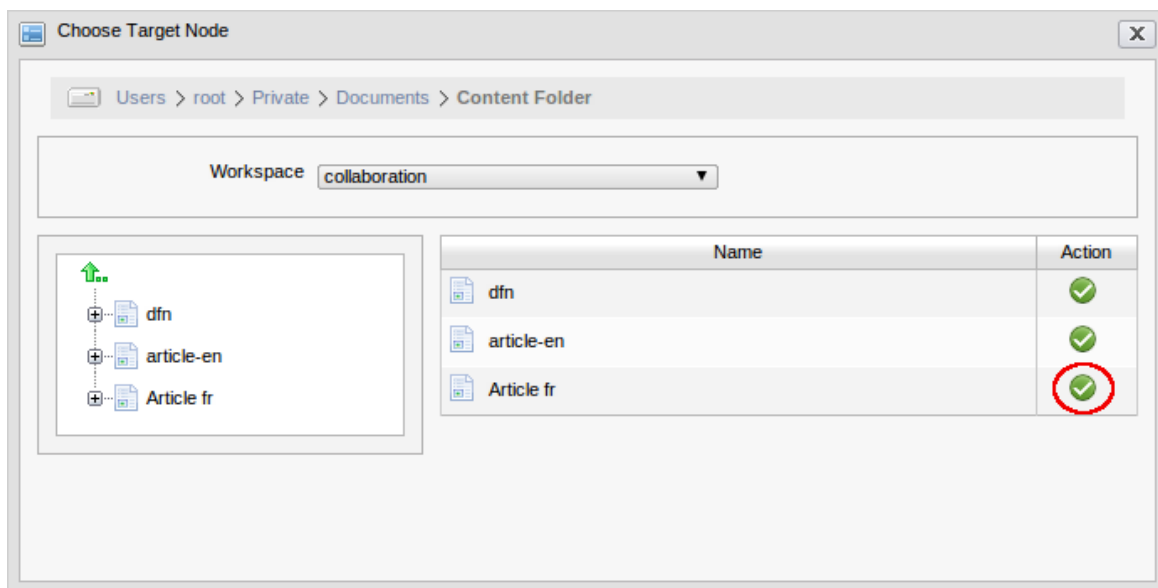


Step 2: Click  **Add Translation** on the **Action** bar.

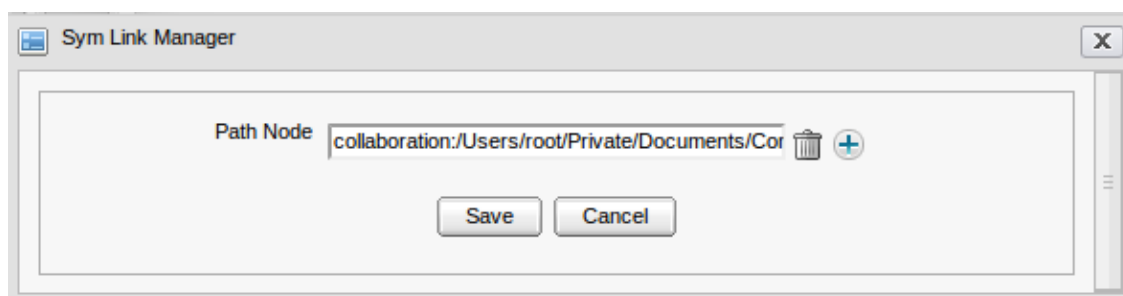
The **SymLink Manager** form will appear:



Step 4: Click , then browse to the target document that has different language with the first document. In this example, let's browse to the Article which is in French version.



Step 5: After you have selected the document, click **Save** on the **Symlink Manager** form:




Select the document which you have added the translation, then click the **Relation** button on the sidebar. You will see the available language for the selected document. Click the language on this panel to view the document in the corresponding language version.

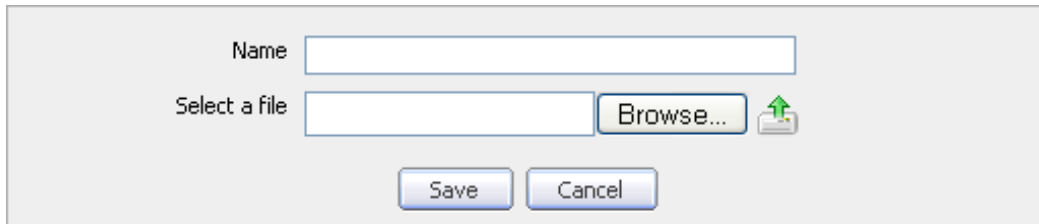


s) Add a language for an uploaded file.

To add a new language for an uploaded file, do as follows:

Step 1: Click **Browse** to select a file from your computer, then click the upload icon .

.



Step 2: Input a value in the **Name** field if you want to change the display name of the uploaded file.

Step 3: Click **Save** to accept inputted values.

t) Vote for documents

This function is used to vote for a document. In which, you cannot vote for a File Plan document.

To vote for a document, do as follows:

Step 1: Open the document you want to vote.

Step 2: Select the **Collaboration** tab to show some advanced actions.

Step 3: Click  Vote for document .



The **Vote Document** form will appear:

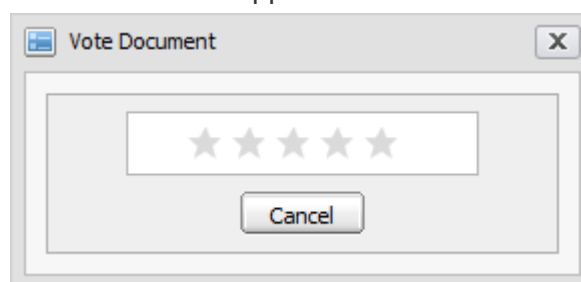
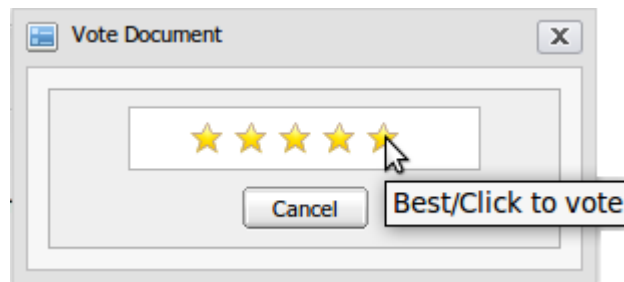
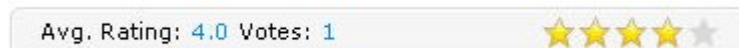


Illustration 81: The Vote Document form

Step 4: Mouse over the stars to rate the document and click to set your rating.



After being voted, the vote information will be displayed at the bottom of the document:



u) Comment on documents

This function supports you in adding a comment for a specific document. However, you can not comment for a File Plan document.

To comment for a document, do as follows:

Step 1: Select the document that you want to add comments.

Step 2: Select the **Collaboration** tab to show some actions on **Acton bar**:

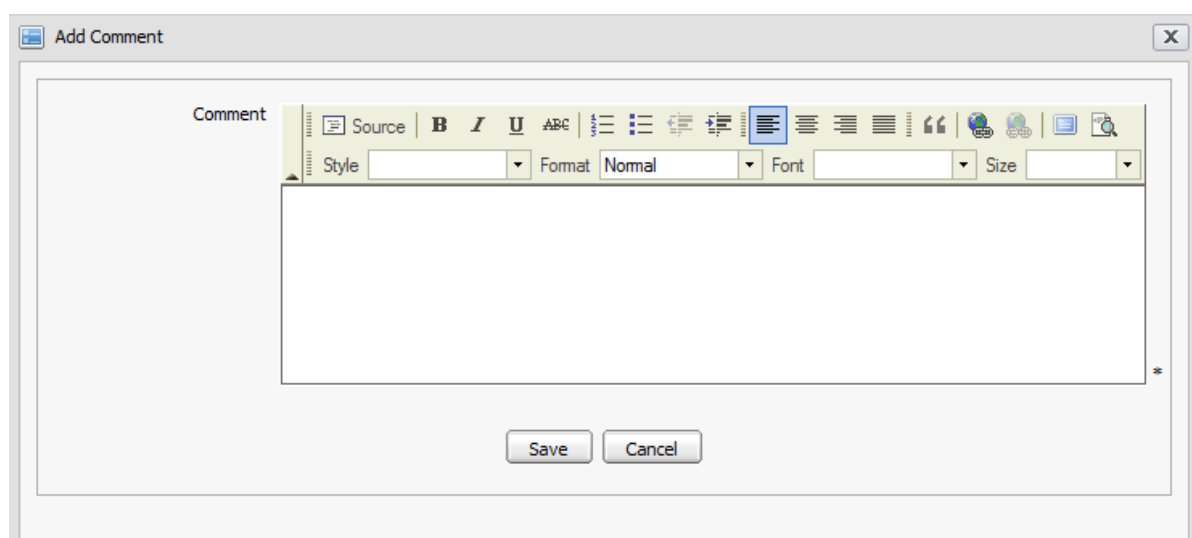
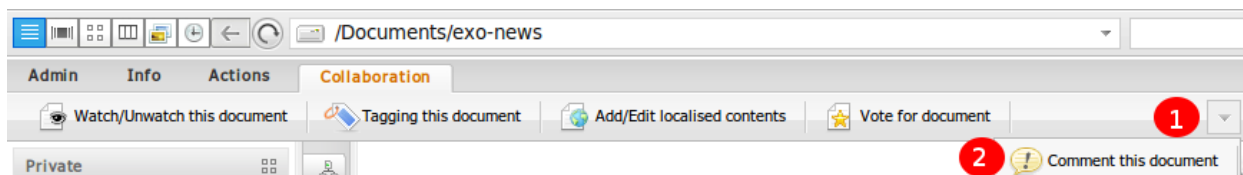


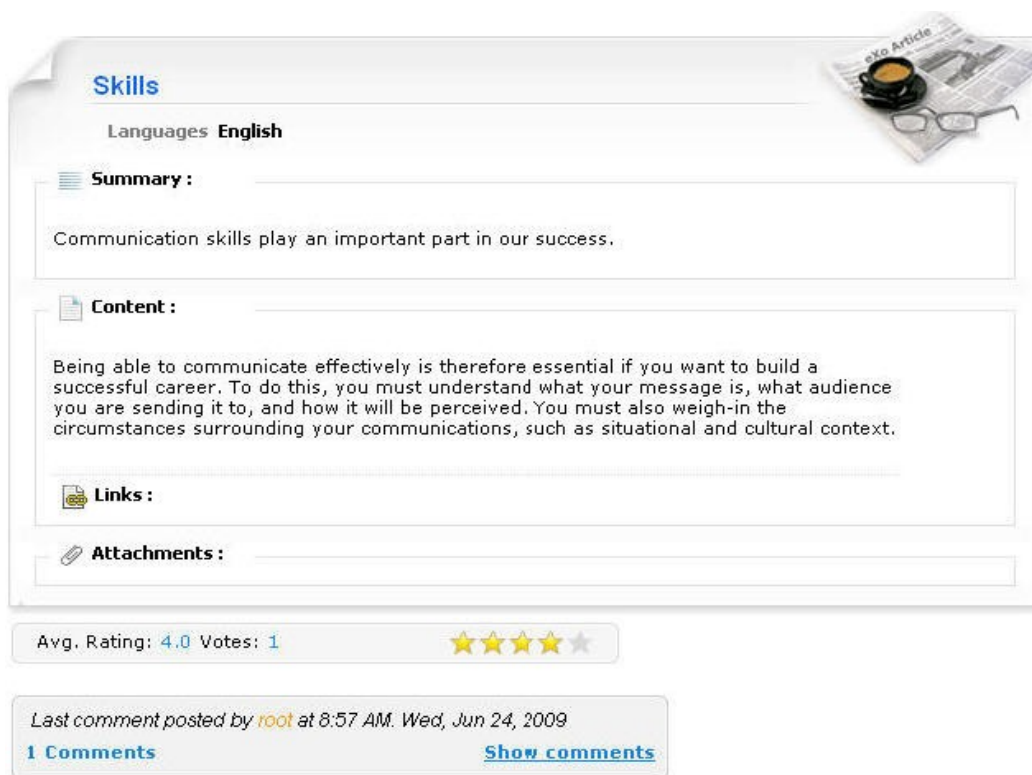
Illustration 82: The Add comment form

Step 3: Click  **Comment this document** . The **Add Comment** form will appear:

Step 4: Input the content in **Comment** (this field is required).

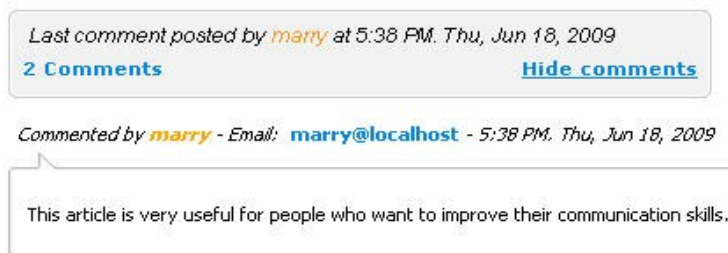
Step 5: Click **Save**.

The content of your comment will be displayed at the bottom of the document:





The screenshot shows a document titled "Skills" with a sub-header "Languages English". It features a "Summary" section with the text "Communication skills play an important part in our success." and a "Content" section with a paragraph about effective communication. Below the content is a "Links" section and an "Attachments" section. At the bottom, there is a rating bar showing "Avg. Rating: 4.0 Votes: 1" with five stars. A comment box indicates "Last comment posted by root at 8:57 AM. Wed, Jun 24, 2009" with "1 Comments" and a "Show comments" link.

To view your comment, click the **Show comments** link. The content will be displayed:



The screenshot shows the comment details for the document "Skills". It displays "Last comment posted by marry at 5:38 PM. Thu, Jun 18, 2009" with "2 Comments" and a "Hide comments" link. Below this, it shows the comment text: "This article is very useful for people who want to improve their communication skills." and the user information: "Commented by marry - Email: marry@localhost - 5:38 PM. Thu, Jun 18, 2009".

You can also edit your comment by clicking the edit icon  or delete it by clicking  next to it.

3.3.5 Search in Sites Explorer

There are three ways to search an existing node: Simple search, Advanced search & Quick search.

3.3.5.1 Simple search

This function is used to search by the properties of the document except document's name.

Do as follows:

Step 1: Input a string that is existing in a document you want to find (not in name)

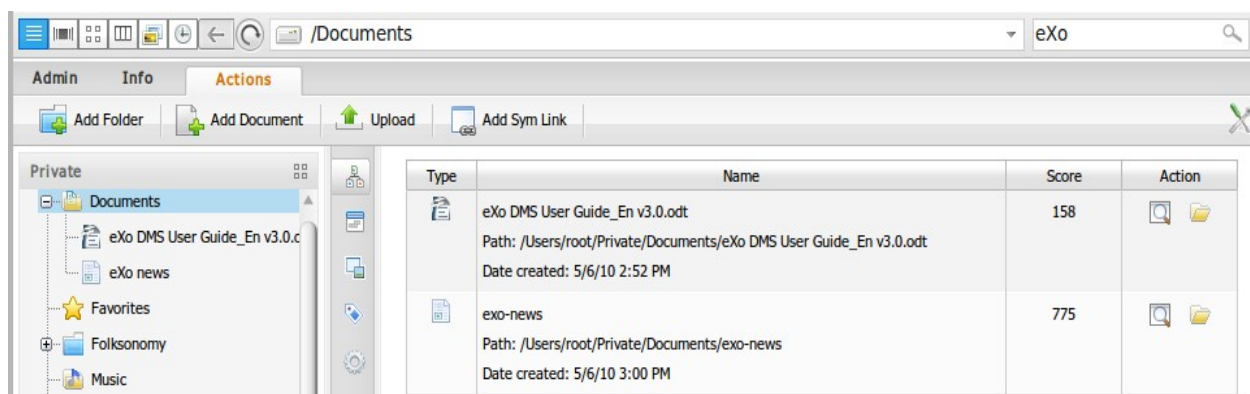
Step 2: Click the magnifying glass icon  to search.

The search result will be returned in the right panel.





- If there is no node containing the search term, the search result will be empty.


Type	Name	Score	Action
No result found!			







- If the search string is existing, the search result will be listed:



The screenshot shows the eXo Sites Explorer interface. The top navigation bar includes 'Admin', 'Info', and 'Actions' tabs. Below the navigation bar, there are buttons for 'Add Folder', 'Add Document', 'Upload', and 'Add Sym Link'. The left sidebar shows a tree view of the site structure, including 'Private', 'Documents', 'eXo DMS User Guide_En v3.0.c', 'eXo news', 'Favorites', 'Folksonomy', and 'Music'. The main content area displays a table of search results for the term 'eXo'.

Type	Name	Score	Action
Document	eXo DMS User Guide_En v3.0.odt Path: /Users/root/Private/Documents/eXo DMS User Guide_En v3.0.odt Date created: 5/6/10 2:52 PM	158	 
Document	exo-news Path: /Users/root/Private/Documents/exo-news Date created: 5/6/10 3:00 PM	775	 

Click  in the Action column to view the content:

Type	Name	Score	Action
	eXo DMS User Guide_En v3.0.odt Path: /Users/root/Private/Documents/eXo DMS User Guide_En v3.0.odt Date created: 5/6/10 2:52 PM	158	 
	exo-news Path: /Users/root/Private/Documents/exo-news Date created: 5/6/10 3:00 PM	775	 

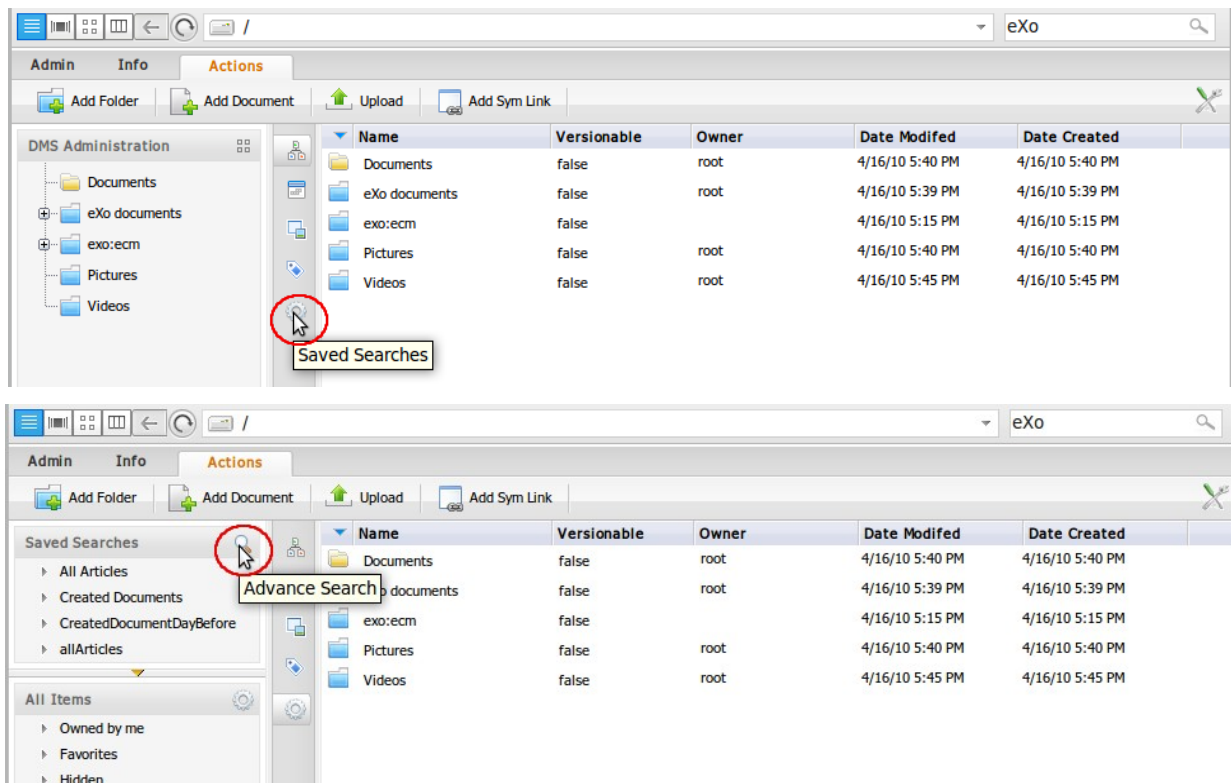
You can also click to go to the node that contains the corresponding search result.

After clicking this icon, the node containing that search result node will be shown.

3.3.5.2 Advanced search

- ✓ To open the advanced search, do as follows:

Click the Saved Search icon , then the **Advance Search** icon to open the **Advanced Search** form.



The **Advanced Search** form appears:

The Advanced Search form is shown. It has a tabbed interface with 'Search by Name', 'Advanced Search', 'New Query', 'Saved Query', and 'Search Results'. The 'Advanced Search' tab is selected. The form contains a text input field for 'Content name' and a 'Search' button.

Search on this location: /Users/root

Content name *

Illustration 83: The Advanced Search form

There are more options for you to search: search by Name, search with constraints, search by new/existing query.

a) Search by name

To search nodes by a name, select the first **Search by Name** tab and do as follows:

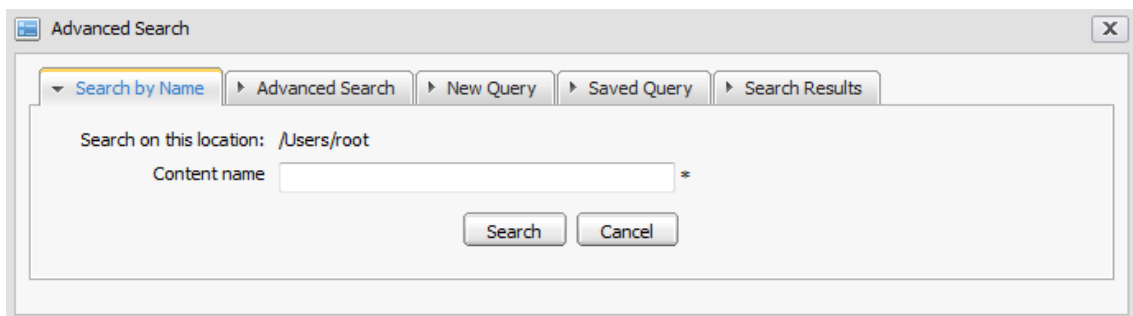
The screenshot shows the 'Advanced Search' dialog box with the 'Search by Name' tab selected. The 'Search on this location' field is set to '/Users/root'. Below it, the 'Content name' field is empty with an asterisk (*) to its right. At the bottom, there are 'Search' and 'Cancel' buttons.

Illustration 84: The Search by Name tab in the Advanced Search form

Step 1: Input exactly the name of the node that you want to search.

Step 2: Click **Search**. It will return with the message “No result found” if there is no node with the searching name. If the searching name has been existing, the result will be return in the **Search Results** tab like in simple search.

b) Search with constraints

This kind of search allows you to search with more constraints to limit the returned results.

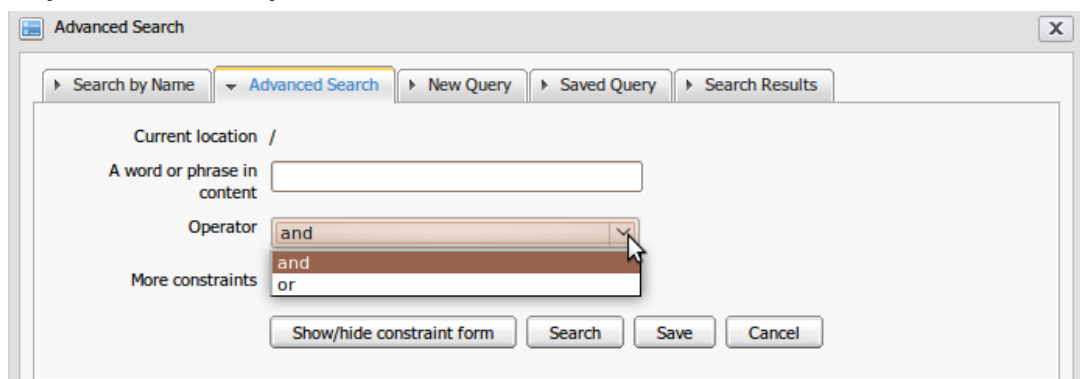
Current location is the path that you selected to search.

By this way, you can do like a simple search by inputting the search term into A word or phrase in the content field and then click Search. The result will be returned in the **Search Results** tab.

You can also search with more constraints by doing as follows:

Step 1: Input the search term that you want to search in the content fields of nodes.

Step 2: Select the **Operator**.

The screenshot shows the 'Advanced Search' dialog box with the 'Advanced Search' tab selected. The 'Current location' is set to '/'. There are three input fields: 'A word or phrase in content', 'Operator', and 'More constraints'. The 'Operator' dropdown menu is open, showing 'and' and 'or' options. At the bottom, there are 'Show/hide constraint form', 'Search', 'Save', and 'Cancel' buttons.

- Select AND when you want to combine the inputted string and the constraints will be added after selecting an operator. The search result will not be blank only when there's a node that meets both conditions (the phrase and the constraints).
- Select OR when you want to combine the inputted string and the constraints will be added after selecting an operator. The search result will not be empty when there's a node that meets at least one of two conditions (the phrase and the constraints).



Step 3: Click **Show/hide constraints form** to add more constraints.

The screenshot shows the 'Advanced Search' tab selected. Below the navigation tabs, there is a section for 'Current location /' and a text input field for 'A word or phrase in content'. Below this is a dropdown menu for 'Operator' with 'and' selected. Further down is the 'More constraints' section, which contains a button labeled 'Show/hide constraint form' (highlighted with a mouse cursor), and three other buttons: 'Search', 'Save', and 'Cancel'.

The adding constraints form will appear:


The screenshot shows the 'Adding constraints form' dialog. At the top, it displays 'Operator : and' with a dropdown arrow and a circled '1'. Below this are seven numbered constraint options (2-7) on the right side. Each option consists of a checkbox, a text input field for 'Property', and a relationship operator with its own input field. The options are: 2. 'Contain Exactly', 3. 'Contain', 4. 'Not Contain', 5. 'CREATED' (with a dropdown arrow) 'From' and 'To' date fields, 6. 'Document Type', and 7. 'Category'. Each option has a small icon to its right. At the bottom of the dialog are 'Add' and 'Cancel' buttons.

Details:



1	You can add more than one constraint thus there are two operators AND and OR for you to combine them.
2	These fields allow you to add a constraint to search by a property with specific values.
3	These fields allow you to add a constraint to search by a property with specific values.
4	These fields allow you to add a constraint to search by a property that contains one of the word in the specific string.
5	These fields allow you to add a constraint to search by a property that does not contain the specific string.
6	These fields allow you to add a constraint to search by a duration of date (created, modified).
7	This field allow you to add a constraint to search by the document type (File, Article, Podcast, Sample node, File Plan, Kofax).
8	This field allow you to add a constraint to search by categories.
	Add a node type.
	Add a category.


Step 4: Select the constraint operator (AND/OR).


Step 5: Check the check box corresponding to the row you want to add a constraint.

- **5.1** To add a constraint to search by properties with exactly values, do as follows:
 1. Check the checkbox corresponding to the one you want to add a constraint.
 2. Input the property you want to find or click the Add Property icon  .


Operator : and ▼


☐ Property :  Contain Exactly : 

☐ Property :  Contain :

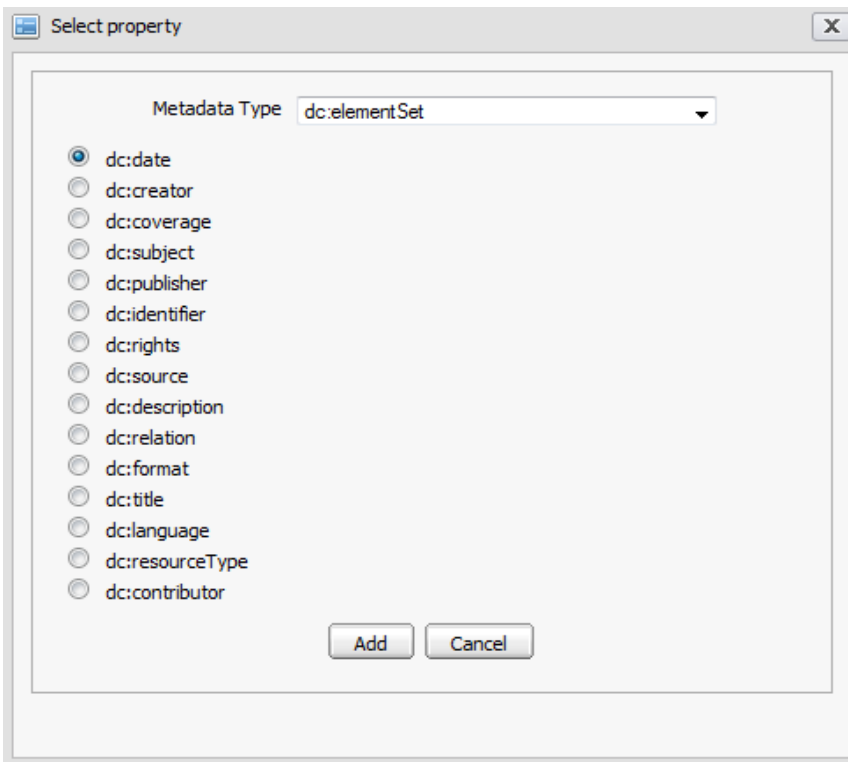
☐ Property :  Not Contain:

☐ CREATED ▼ From To

☐ Document Type : 

☐ Category : 

The form to select properties appears:



Metadata Type: dc:elementSet

- ☒ dc:date
- ☐ dc:creator
- ☐ dc:coverage
- ☐ dc:subject
- ☐ dc:publisher
- ☐ dc:identifier
- ☐ dc:rights
- ☐ dc:source
- ☐ dc:description
- ☐ dc:relation
- ☐ dc:format
- ☐ dc:title
- ☐ dc:language
- ☐ dc:resourceType
- ☐ dc:contributor

Add Cancel

Illustration 85: The Select property form

3. Check one in the list, then click **Add**. Checked property will be added in the **Property** field.

4. Input a value in **Contain exactly** or click **Find exactly** icon  .

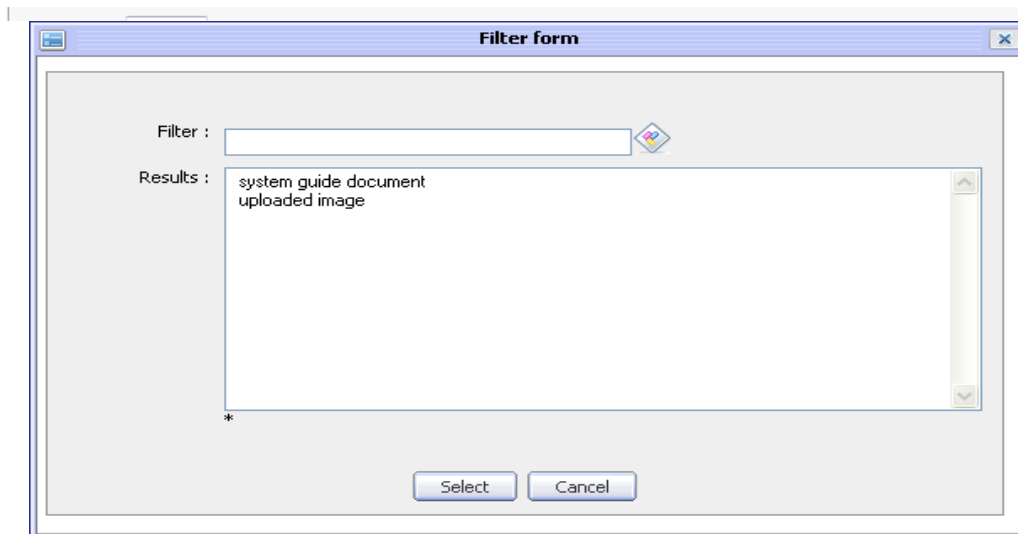




Illustration 86: The Filter form

5. If there are documents that have dc:title property, there will be a list of all values in this field for all documents.

If there is the value you want, move the cursor and click the name. The selected one will be marked by a blue color. Then click the **Select** button. The **Filter** field is used to limit the number of results below. Input the string that you want to limit and then click  right next to it. The filtered result will be returned below. The selected value will be displayed in the **Contain Exactly** field.

- **5.2** To add a constraint to search by properties with exactly values, do as follows:
 1. Check the check box corresponding to the one you want to add constraints
 2. Input the property you want to find or click Add Property icon  .
 3. Input value in the **Contain** or **Not Contain** field.


4. Click **Add**.

- **5.3** To add a constraint to search by duration of date, do as follows:
 1. Select the check-box corresponding to the one you want to add constraint
 2. Select the search condition from the list (CREATED, MODIFIED)
 3. In **From** or **To** field, click the cursor in the textbox, a mini calendar will appear for you to choose date easily.

The screenshot shows a search constraint configuration window. The 'Operator' is set to 'and'. The first constraint is checked: 'Property: dc:subject' with the operator 'Contain Exactly'. Below it are unchecked options for 'Property' with 'Contain' and 'Not Contain' operators. The third option is checked: 'CREATED' with the operator 'From'. A mini calendar is displayed over the 'From' field, showing the month of March 2010. The calendar grid shows days from Sunday to Saturday, with the 1st of March highlighted. The 'To' field contains the value '10'.

4. Select the **From** date and do the same with **To** date. The selected date will be displayed:

The screenshot shows the same search constraint configuration window. The 'CREATED' constraint is now fully configured with 'From' date '03/01/2010' and 'To' date '03/15/2010'. The 'Document Type' and 'Category' fields are empty. At the bottom, there are 'Add' and 'Cancel' buttons.

- **5.4** To add a constraint to search by document type, do as follows:
 1. Check the check box corresponding to the one you want to add constraints
 2. Input the document type that you want to search or click  . There will be a list of all document types.

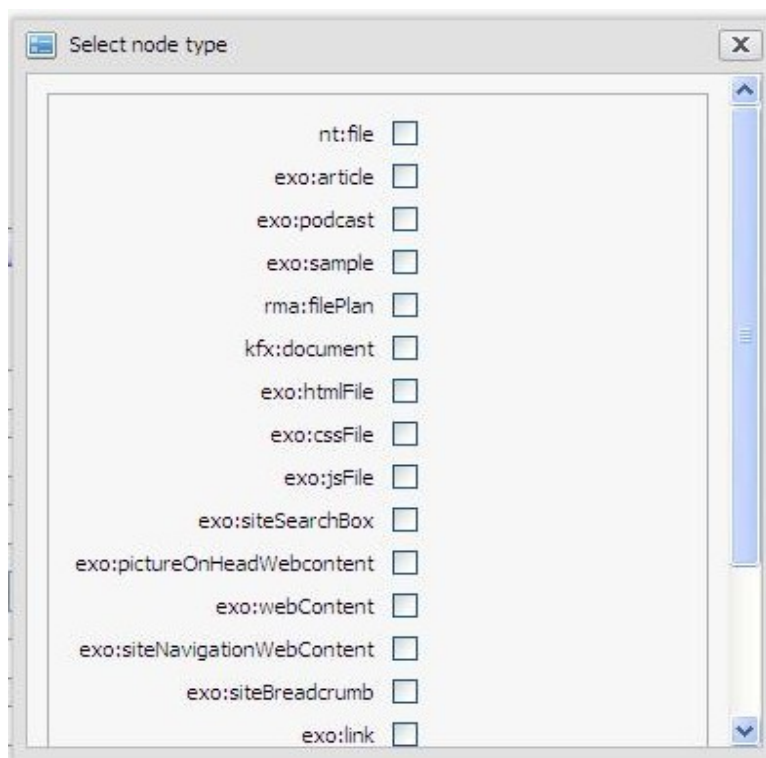


Illustration 87: The Select node type form

3. Mark the checkbox of the document type you want, then click **Save**.
4. Checked document types will be displayed:

Operator : and ▼

☒ Property : dc:title Contain Exactly : uploaded image

☐ Property : Contain :

☐ Property : Not Contain :

☐ CREATED ▼ From 03/01/2010 To 03/15/2010

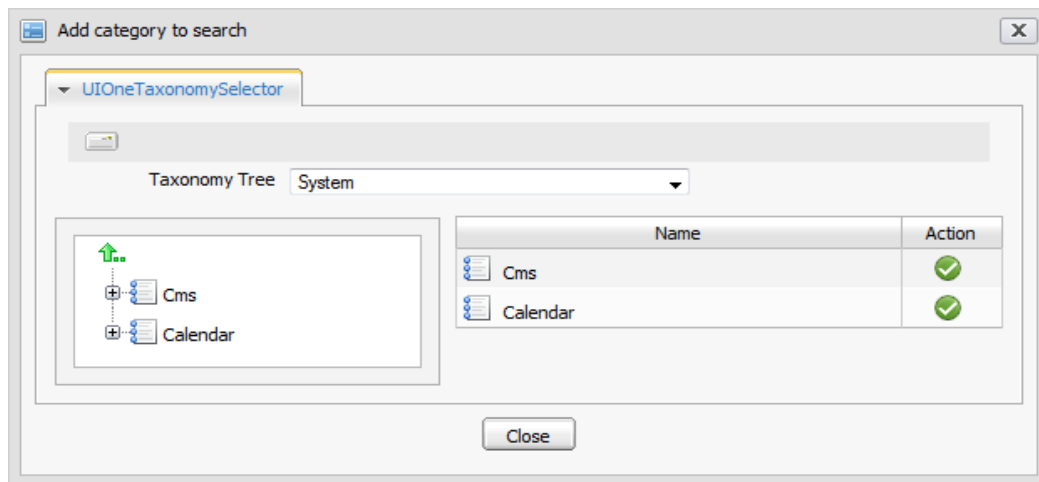
☒ Document Type : nt:file, exo:article, exo:podcast


☐ Category :

Add Cancel

- **5.5** To add a constraint to search by categories, do as follows:
 1. Mark the checkbox that corresponds to the one you want to add constraints.
 2. Input the categories to search, or click .

A list of all categories will appear:





- Click  on a category you want to select. The selected category will be displayed in the **Category** field.
- Click **Add** to add created constraints. The constraint will be generated to SQL query and displayed in search form:


Current location: /Documents/Live


A word or phrase in content:

Operator:

More constraints: (@dc:title = 'uploaded image') 

and ((documents created from '03/11/2008') and (documents created to '03/26/2008')) 

and (@jcr:primaryType = 'nt:file' or @jcr:primaryType = 'exo:article' or @jcr:primaryType = 'exo:podcast') 

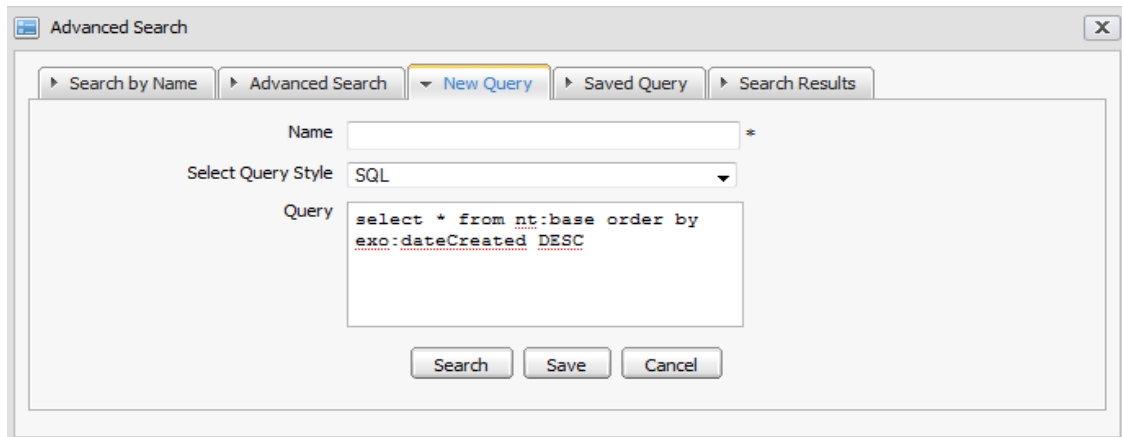
To remove a constraint, just click the corresponding trash icon  .

To start searching, click **Search**. The search results are displayed in the **Search Results** tab.

To save the search you've created, click **Save**, input the query name and click **Save** in the add new query form.

c) Search by creating a new query

Select the **New Query** tab:



The screenshot shows the 'Advanced Search' dialog box with the 'New Query' tab selected. It contains a 'Name' field with an asterisk, a 'Select Query Style' dropdown set to 'SQL', and a 'Query' text area containing the SQL statement: `select * from nt:base order by exo:dateCreated DESC`. At the bottom are 'Search', 'Save', and 'Cancel' buttons.

This requires you have to know about the structured and query statements.

There are two types of query for you to choose: SQL and xPath.

- ✓ To create new query, do as follows:

Step 1: Input a query name, it must be the unique.

Step 2: Select a query style.

Step 3: Input a query statement.

Step 4: Click **Search** to review the search result and display search result in the **Search Results** tab, or **Save** to accept creating the new query.

Step 5: The new saved query will be displayed in existing queries list in the **Saved Query** tab.

d) Search by existing queries

Select the **Saved Query** tab:

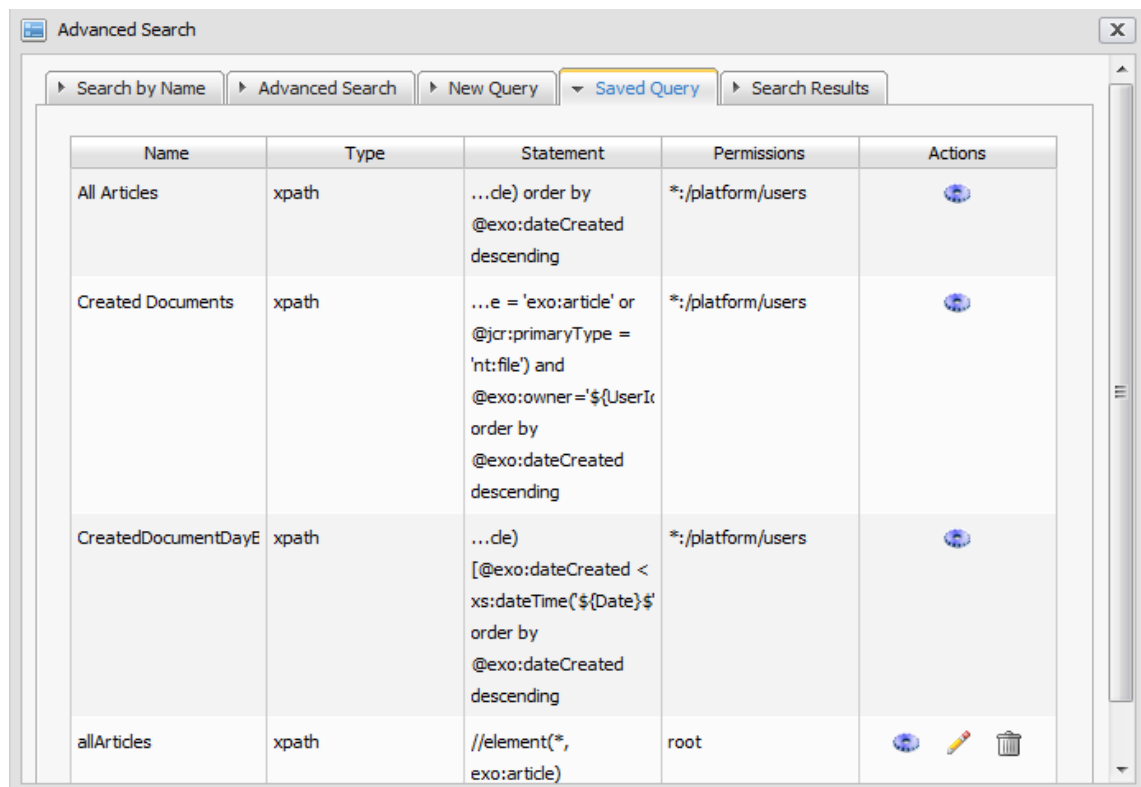


Illustration 88: The Saved Query tab in the Advanced Search form

This is the list of all existing queries that you have a right to use. In this example, the first query is the system query, it is created by Administrator, you can not edit or remove it.

Click to see the search results in the **Search Results** tab

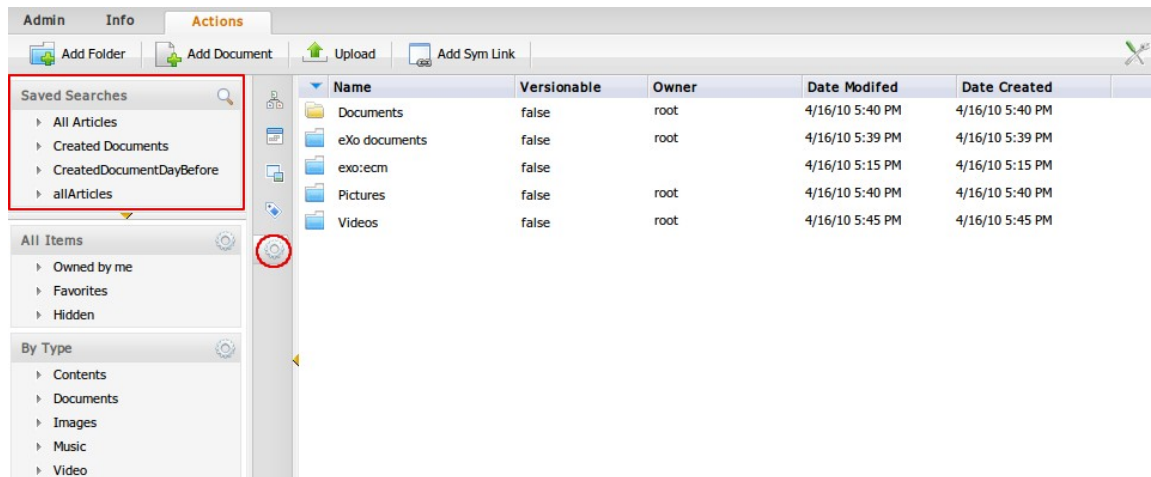
Click if you want to change the query statement. The editing form appears like when you create a new query but you can not change its name.

Click if you want to delete the query (note that you must have the right to delete the query to perform this action).

3.3.5.3 Quick search

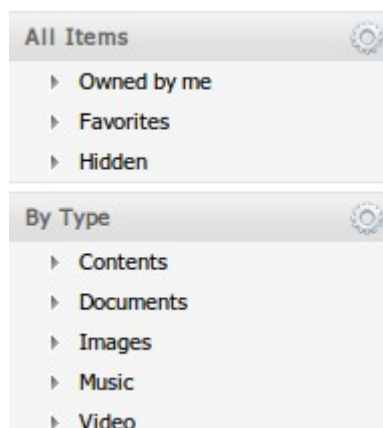
This is the quick way for you to use the existing queries to search.

Step 1: Click the icon to see the existing queries list.



The existing query list will be appeared: **All Articles**, **Created Documents**, **CreatedDocumentDayBefore**, and **allArticles**. **Step 2:** Do the same like when you do the advanced search in the **Saved Query** tab.

The panel: **All Items** and **By Type** helps you filter documents, files, folders according to items: **Owned by me**, **favorites**, **hidden** or by types: **content**, **documents**, **images**, **music** and **video**.



Step 3: Click the item or the type that users want to filter nodes (files, folders, documents), the filter list result will be displayed on the right panel.

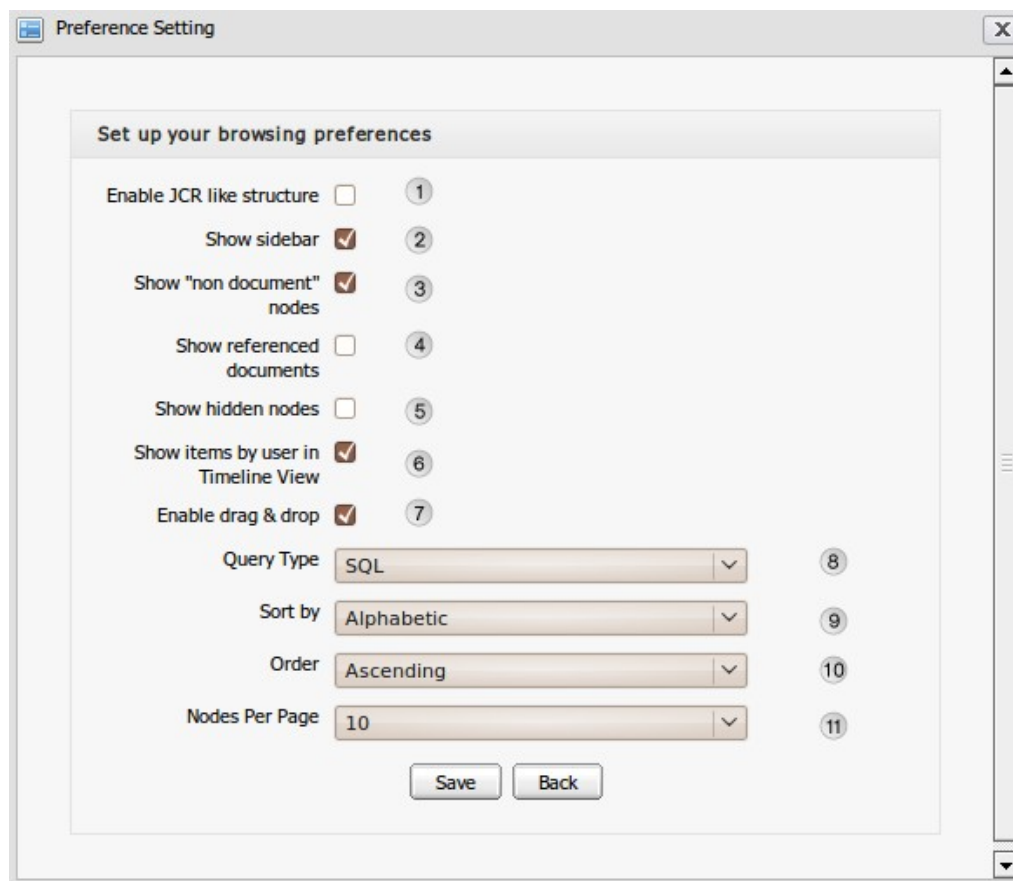
You can click directly on files or a folders's name to view their content and download these files .

3.3.6 Preference Setting

This function is used to set up your browsing preferences.

Do as follows:

Step 1: Click  on the right corner of the **Sites Explorer** portlet. There will be a form to set up your browsing preferences:



The image shows a 'Preference Setting' dialog box with the title 'Set up your browsing preferences'. It contains several settings, each with a numbered circle next to it:

- 1. Enable JCR like structure: ☐
- 2. Show sidebar: ☒
- 3. Show "non document" nodes: ☒
- 4. Show referenced documents: ☐
- 5. Show hidden nodes: ☐
- 6. Show items by user in Timeline View: ☒
- 7. Enable drag & drop: ☒
- 8. Query Type: SQL (dropdown)
- 9. Sort by: Alphabetic (dropdown)
- 10. Order: Ascending (dropdown)
- 11. Nodes Per Page: 10 (dropdown)

At the bottom of the dialog are 'Save' and 'Back' buttons.

Illustration 89: The Preference setting form

1. Enable JCR like structure	This option is to display nodes in a document in tree structure.
2. Show sidebar	This option is to display a sidebar.
3. Show sidebar	This option is to display a sidebar.
4. Show non document nodes	This option is to display nodes that are non–documents.
5. Show referenced documents	This option is to display referenced documents.
6. Show hidden nodes	The option is to display hidden nodes.
7. Show items by user in Time line View	This option is to display items by a user or not in Timeline view.

8. Enable drag and drop	This option is to allows taking the “drag and drop” action or not.
9. Query Type	This query type.
10. Sort by	This condition is used to sort nodes in nodes list.
11. Order	This type of the sorted order.
12. Nodes per page	This number of nodes that will be displayed per page.

Step 2: After setting up your browsing preferences, click **Save** to set up preferences, or click **Back** to escape from this form without saving.

3.3.7 Admin

Admin functions allow you to create versions, view properties, manage categories, actions, import and export nodes.

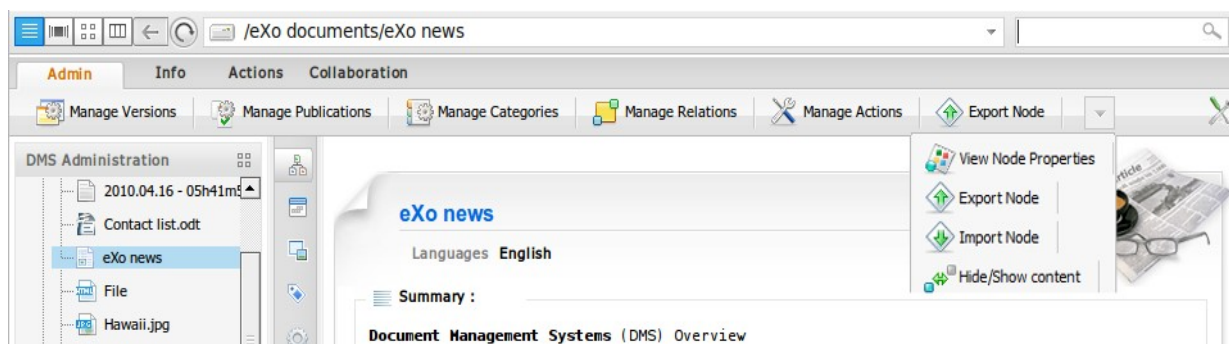
3.3.7.1 Manage versions

When you update or edit a node, a new content will replace the existing one. By using **Manage versions** function, you can update or edit node but still keep the old versions.

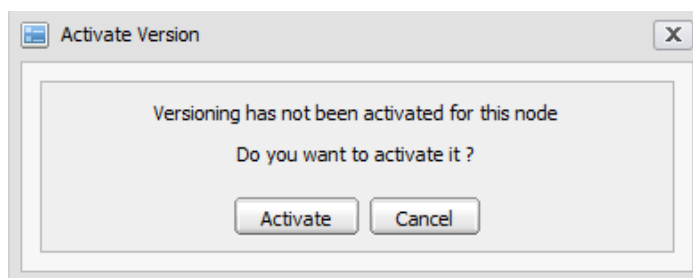
a) Add versions for node

Step 1: Select a node that you want to add a version from the left or right panel.

Step 2: Select the **Admin** tab to show available administration actions:

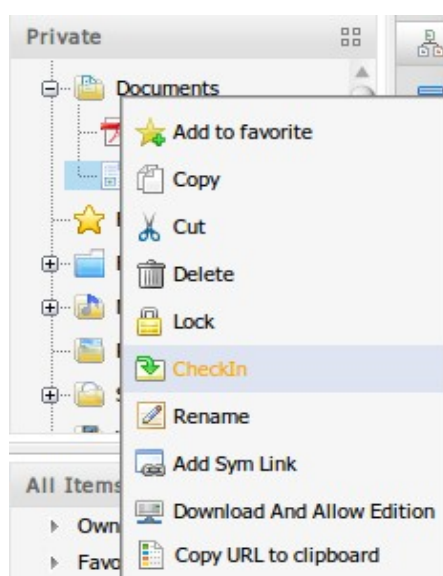


Step 3: Click  **Manage Versions**. A confirmation message will appear:



Step 4: Click the **Activate** button to activate a version for a node.

Step 5: Right-click a selected node, then select **Check in** from the menu.



Step 6: Click the  **Manage Versions** again to open the **Version Info** pop-up:

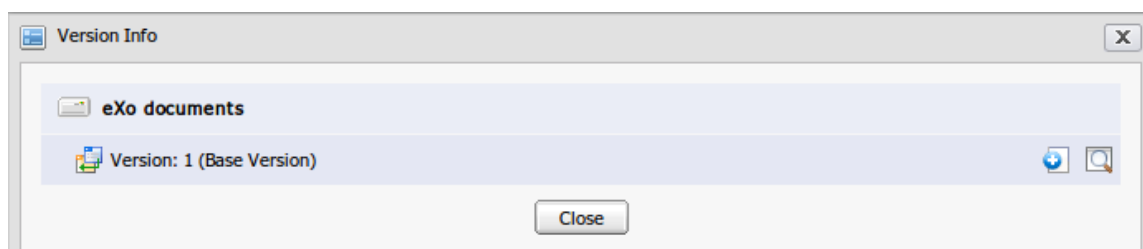


Illustration 90: The Version info form

A node is added a version and it is 'Base version'

Step 7: Right-click the selected node, and select **Check out** to finish adding a version for a node:




If node is in the **Check In** status, you can not take any action like copy/cut, rename , etc. You must check out before doing other actions.

If you want to add more versions for a node, right click selected node above and do **Check In** and **Check Out**

b) Add removing labels for versions

- ✓ To add a label for a version, do as follows:

Step 1: Select a node which is added a version.

Step 2: Click  **Manage Versions** to open the **Version Info** form.

Step 3: Click  to show the **Add label** form under the version list:

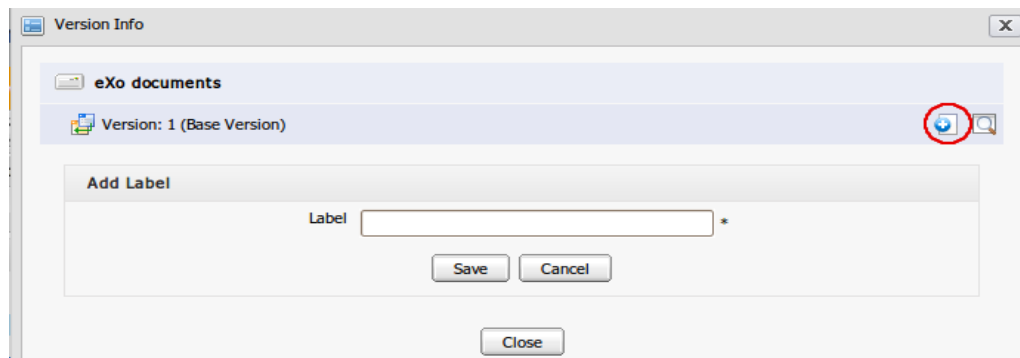


Illustration 91: The Version Info form


Step 4: Input a value in the **Label** field.

You can not to use special characters, such as @, #, \$.

The label name must be different from the existing labels.

Step 5: Click **Save** to accept the inputted label.

- ✓ To remove a label of a version, do as follows:

Step 1: Click  to show the **Remove label** form:

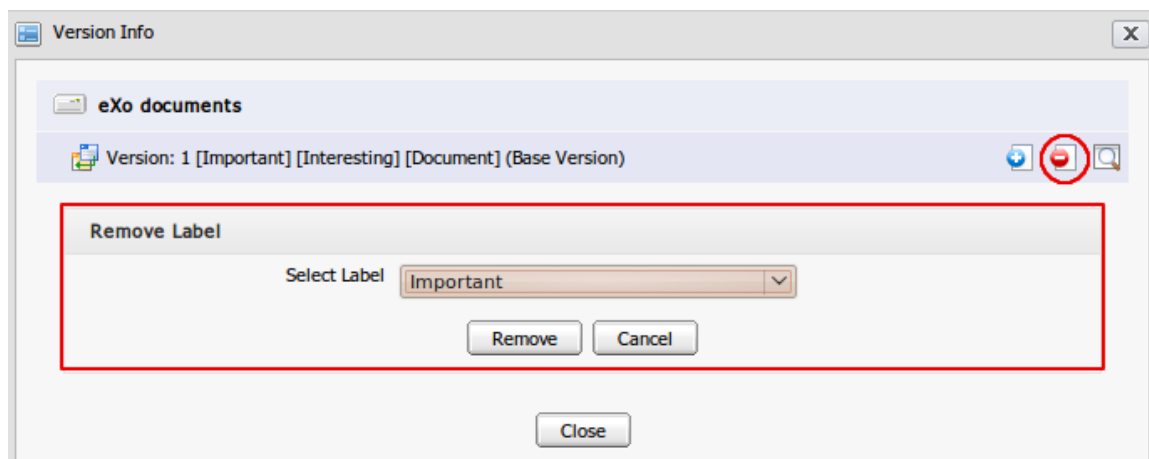


Illustration 92: The Remove label form

Step 2: Click the icon and select one label you want to remove:

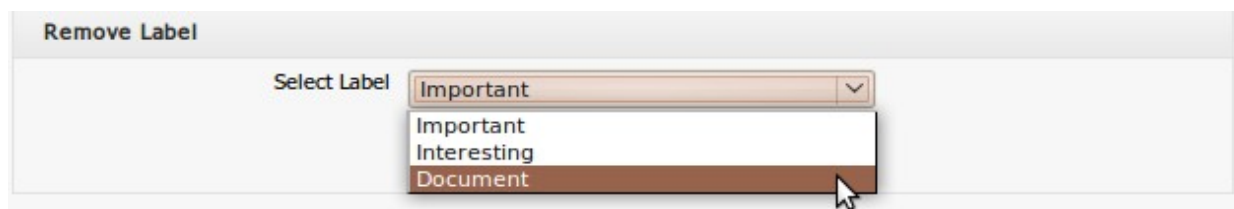


Illustration 93: Select Label in the Remove Label form

Step 3: Click the **Remove** button. The selected label will be deleted.

c) View versions of nodes

Do the following steps to view a content of a version:

Step 1: Select a node which is added version.


Step 2: Click  **Manage Versions** to open the **Version Info** form.

Step 3: Click  . The node's content of current version will appear:



Illustration 94: The version info form



If a node is a folder, when click the  icon, a pop-up message will appear to inform that the view template is not supported for a folder.

d) Restore versions of nodes

- ✓ To restore versions of a node, do as follows:

Step 1: Select a node that has at least 2 versions.

Step 2: Click  Manage Versions to open the **Version Info** form:



Step 3: Select a version that you want to make it as a base version.

Step 4: Click . The selected version will become a base version.

e) Delete versions


Do the follows:

Step 1: Select a node which has at least 2 versions.



Step 2: Click  **Manage Versions** to open the **Version Info** form.

Step 3: Select a version that you want to delete.

Step 4: Click  corresponding to the version you want to delete.

Step 5: Click **OK** on the confirmation message to accept deleting, or click **Cancel** to quit without deleting.



You can not delete a base version.

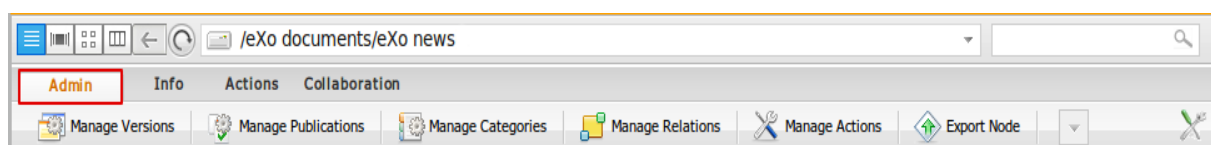
3.3.7.2 Manage Publications


This function is used to manage publications of a node.

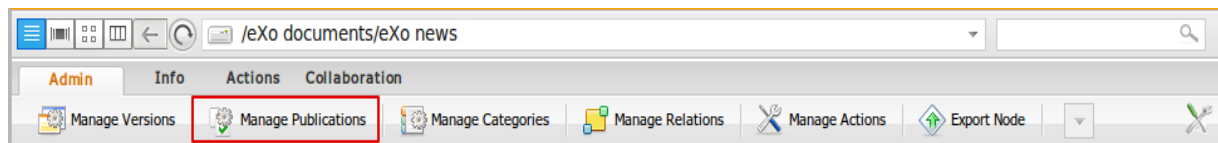
Do as follows:

Step 1: Select a node (on the left or right panel) which you want to manage the publication.

Step 2: Select the **Admin** tab to show some administration actions on the **Action** bar:



Step 3: Click  **Manage Publications** on the Action bar.



The **Manage publication** form will be shown immediately:

The 'Manage publication' form is displayed with the 'Publication status' tab selected. It shows a flow diagram for the status of 'eXo news' and a table of revisions.

Revision eXo news

Status:

```

graph LR
    Enrolled[Enrolled] --> Draft[Draft]
    Draft --> live[live]
    live --> Obsolete[Obsolete]
  
```


Revisions	Date	Author	Status	Action
Revision: eXo news	Apr 19, 2010 2:31:09 PM	__system	Enrolled[current revision]	
Revision: 4	Apr 19, 2010 2:35:32 PM	__system	Obsolete	
Revision: 2	Apr 19, 2010 2:35:26 PM	__system	Obsolete	


See all versions

Close

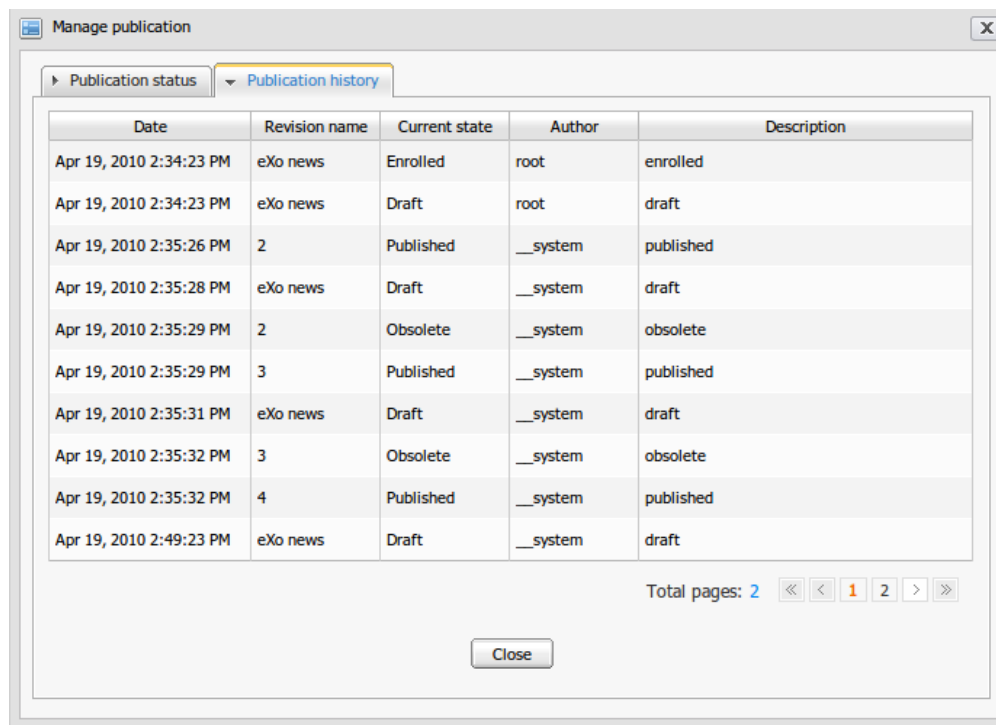
Illustration 95: The Publication Status tab in the Manage publication form

This form will display some basic information and the current state of selected node.

Step 4: View the content of the node by clicking the corresponding icon , or

click  to restore its version.

Step 5: Select the **Publication History** tab to view publication's history.



Step 6: Complete this node's publication management by clicking **Save**.

3.3.7.3 Manage Categories

a) Add a category for a node

This function is used to add a category for a node. You can only add a category for document type.

Do as follows:

Step 1: Select a node that you want to add a category in the left or right panel.

Step 2: Select the **Admin** tab.

Step 3: Click  **Manage Categories** to show the **Add category** form.

Step 4: Select the **Select category** tab to show different categories.

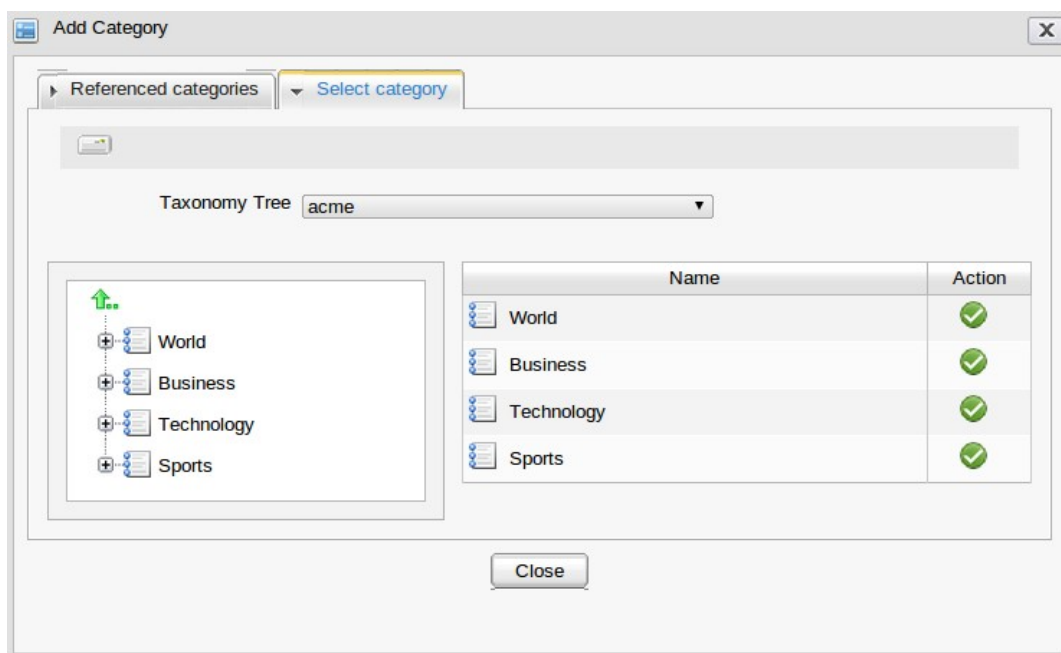


Illustration 96: The Select category tab in the Add Category form

Step 5: Select a category to add for a node by clicking .

The selected category will be displayed in the **Referenced categories** tab:

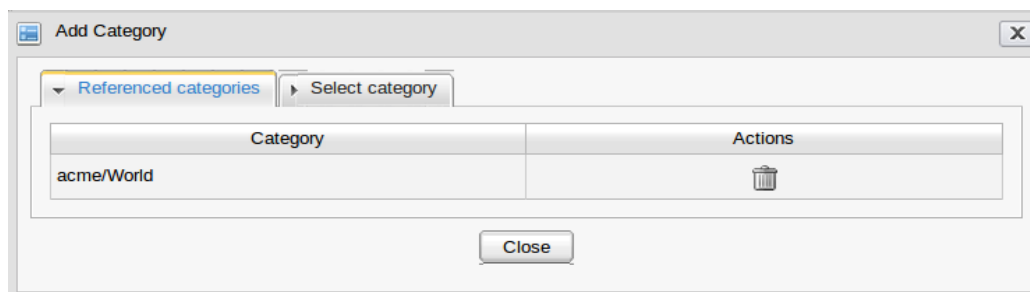


Illustration 97: The Referenced categories tab in the Add Category form

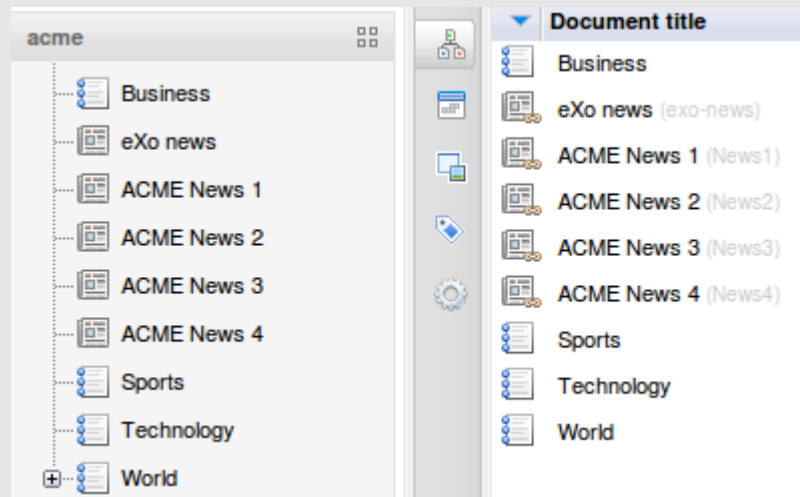
After being added a category, the node will be included in that category.

To view this document, do as follows:

- Go to the drive that contain the category you have added to the document. In this example, it's **acme** drive.
- There will be a list of categories in this drive.
- Go into the category that you have added to view the document. In this example, go to the **World** category.



- When you copy and paste a node in a drive, a new node with different name and the same content will be stored separately in the database.
- When you copy and paste a node in a category tree, the system will create a reference to that node. It means that the new created node is just a reference to the original one. This's a useful feature that help you save the storage:




b) Delete a category

To delete a category, do as follows:

Step 1: Select a node which is added a category.

Step 2: Click  Manage Categories to open the **Add category** form.

Step 3: Select the **Referenced categories** tab.

Step 4: In the row of a category you want to delete, click the  icon. The category which is added for a node will be deleted.

3.3.7.4 Manage relations

This function allows making a relationship from all current nodes to nodes.

a) Add relation for a node

Do the following steps to add relations for a node:

Step 1: Select a node that you want to add relations.

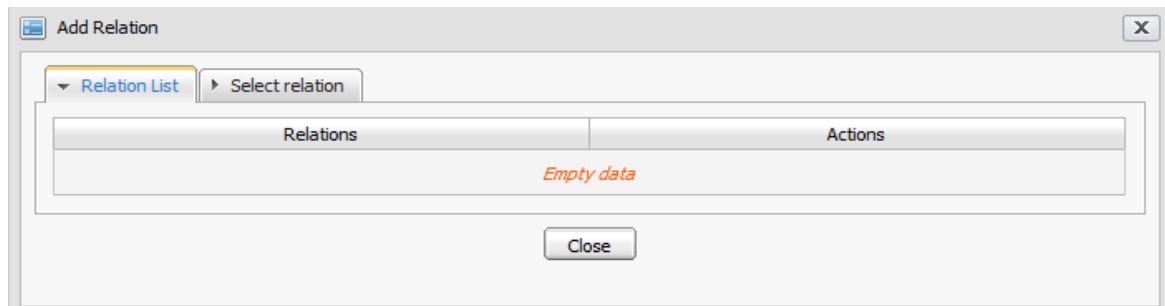


Illustration 98: The Add Relation form

Step 2: Select the **Admin** tab to show some actions. **Step 3:** Select



to show the **Add Relation** form:

Step 4: Select the **Select relation** tab to open a document list in different folders.

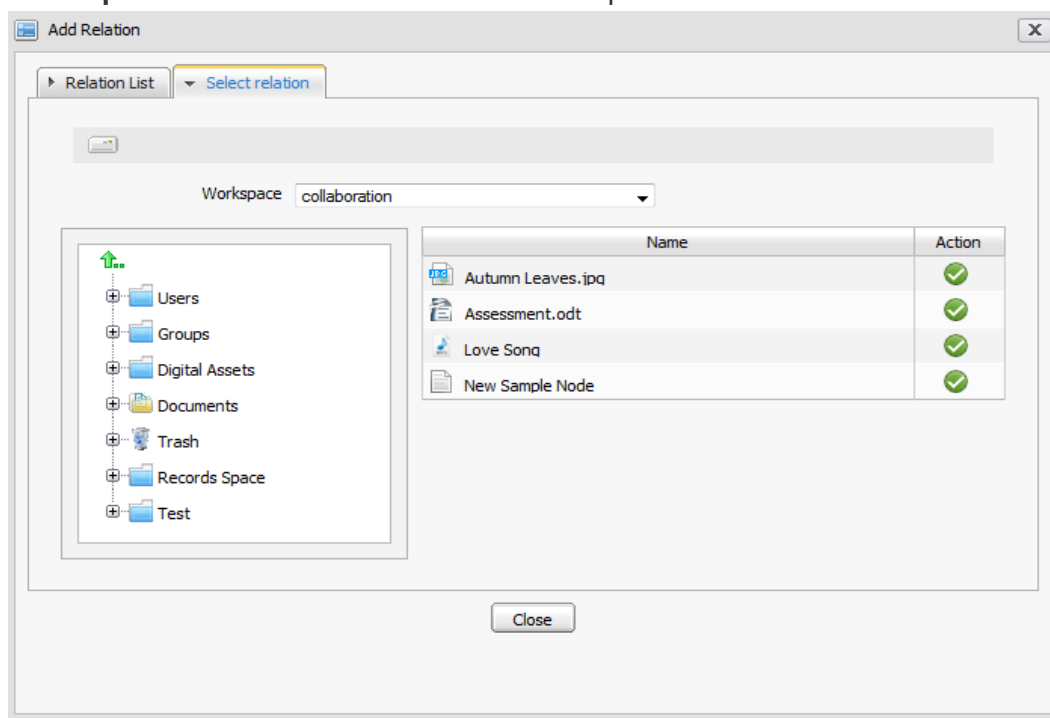

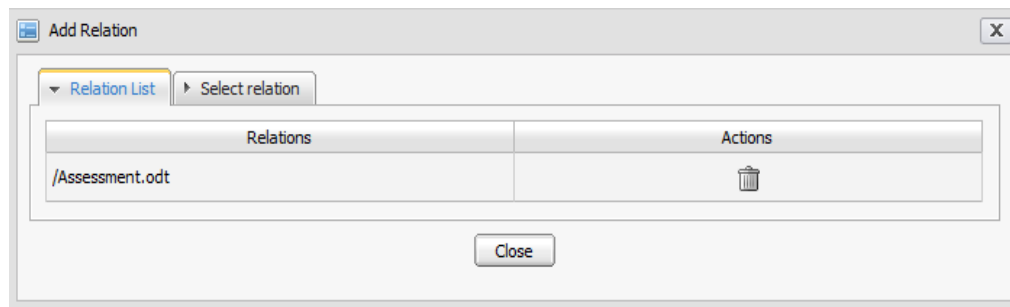


Illustration 99: The Select relation tab in the Add Relation form

Step 5: Select relation nodes by clicking . You only can select documents.

After the relation documents are selected, it will be listed in the **Relation List** tab:



- You can only add relations for a node to documents, uploaded files.
- You can not add relation for a node to itself.
- You not only see the related document of a node in the **Relation List** tab but also can see by selecting **Relation**. All related documents of node are displayed here.


b) Delete relations of node

Do the follows:

Step 1: Select a node that has relation documents

Step 2: Open the **Add Relation** form by clicking  Manage Relations .

Step 3: Select the **Relation List** tab to view relations list.

Step 4: In the row of the related document that you want to delete, click the  icon.

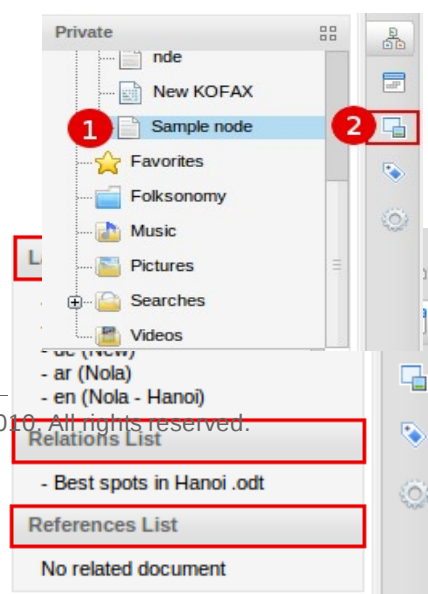
Step 5: Click **OK** on the confirmation message to accept deleting or click **Cancel** to quit. The related document will be deleted from this list.

c) View Relations of node

You can view all the relation documents of a node by doing following steps:

Step 1: Select a node that contains relation documents.

Step 2: Click the relation button on the side panel.



All relations of the selected node will be displayed on the left panel:

You can click the name of the relations in the list to view. The corresponding relation will be displayed on the right panel.

3.3.7.5 Manage actions


a) Add an action

This function supports you in adding an action to a node.

Do the follows:

Step 1: Select a node you want to add an action

Step 2: Select the **Admin** tab.

Step 3: Click  on the Action bar to show the **Manage Actions** form.

Step 4: Select the **Add Actions** tab to add an action. The Manage Actions tab will be displayed:

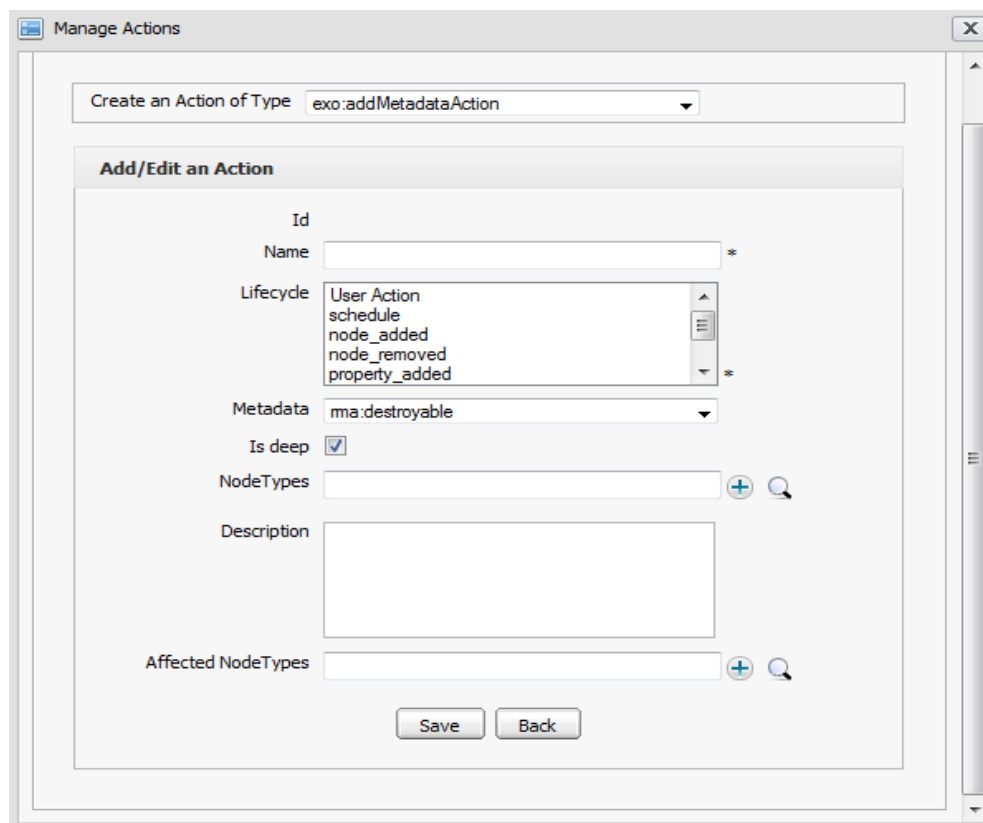
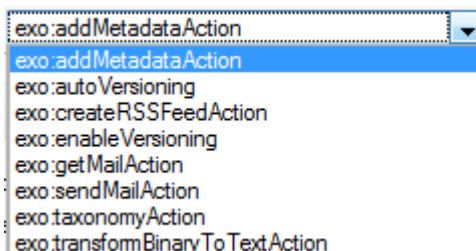


Illustration 100: The Add Action tab in the Manage Actions form

Step 5: Select the type of an action in list by clicking  :



Details:

exo:action	the action is not supported.
exo:AddMetadataAction	to add metadata.
exo:autoVersioning	to automatically add version.
exo:createRSSFeedAction	to create a RSS file.
exo:enableVersioning	to enable versioning.
exo:getMailAction	to get mail.
exo:sendMailAction	to send an e-mail.
exo:taxonomy/Action	
exo:transformBinaryTo TextAction	to convert the files in ".pdf" or ".doc" format into the text file format.

Step 6: Fill out required fields in form of the action that you select.

Step 7: Click **Save**.

All actions of node are listed in the **Available Actions** tab.

After adding an action to a node, all child nodes of this node will have this action in their menu.



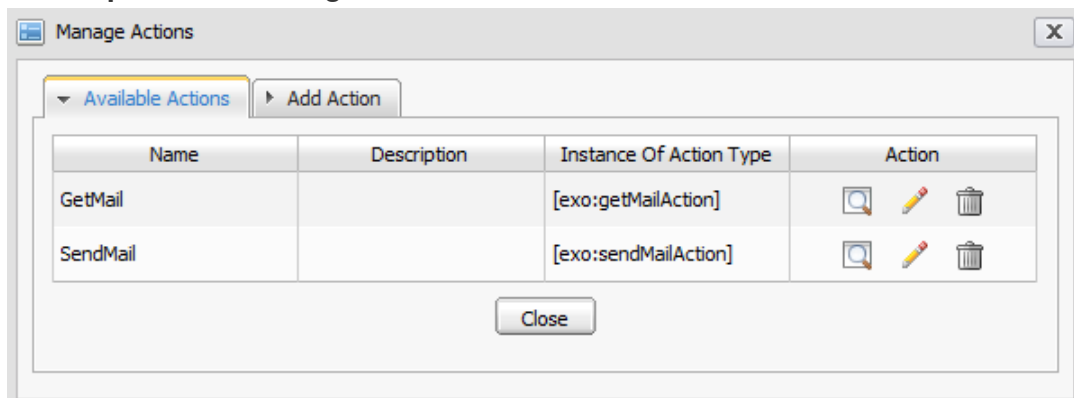
Only some actions are shown in menu, others will be performed immediately you add that action successfully and do a action defined in the 'Lifecycle' field.

Example: If you add an action named 'Send mail' to node A then all child nodes this node will also have this action. To check, right click these child nodes to see this action in menu.







b) View an action

Do the following steps to view an action:

Step 1: In the **Manage Actions** form, select the **Available Actions** tab:




The screenshot shows a window titled "Manage Actions" with a close button (X) in the top right corner. Inside the window, there are two tabs: "Available Actions" (selected) and "Add Action". Below the tabs is a table with four columns: "Name", "Description", "Instance Of Action Type", and "Action".

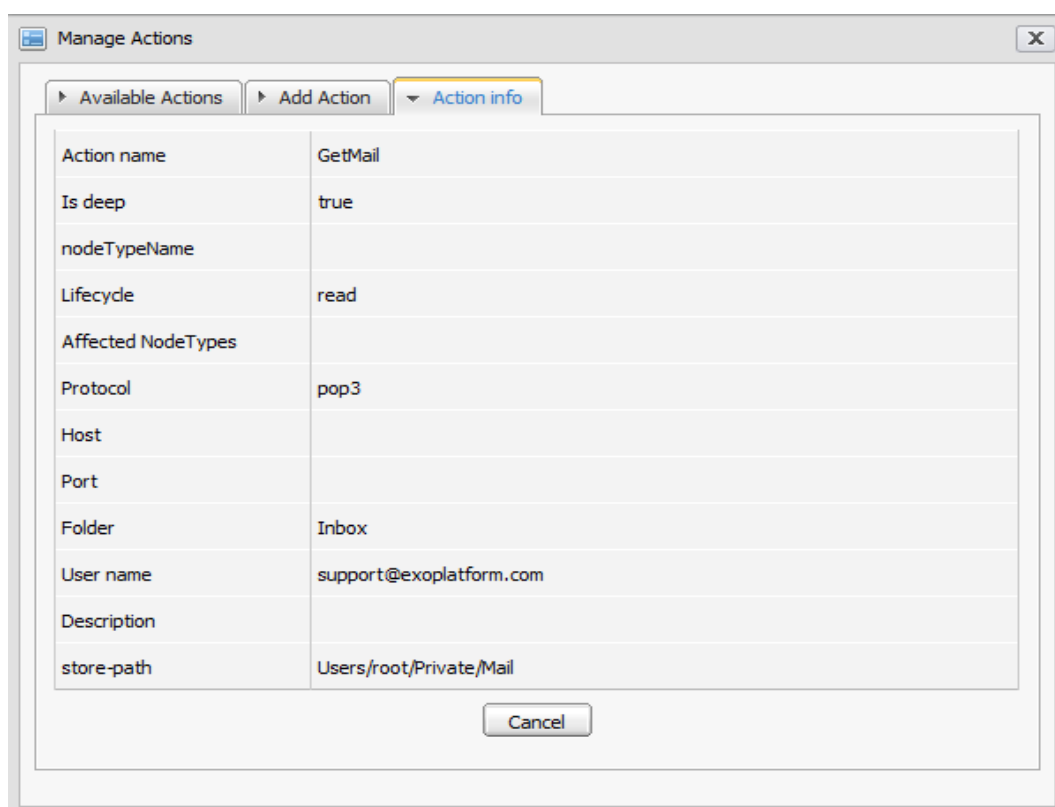
Name	Description	Instance Of Action Type	Action
GetMail		[exo:getMailAction]	  
SendMail		[exo:sendMailAction]	  

Below the table is a "Close" button.

Illustration 101: The Available Actions tab in the Manage Actions form

Step 2: Click  corresponding to an action that you want to view.

Information of this action will appear in the **Action info** tab:



The screenshot shows the same "Manage Actions" window, but now the "Action info" tab is selected. The "Available Actions" and "Add Action" tabs are still visible. The main area displays a list of properties for the selected action (GetMail).

Action name	GetMail
Is deep	true
nodeTypeName	
Lifecycle	read
Affected NodeTypes	
Protocol	pop3
Host	
Port	
Folder	Inbox
User name	support@exoplatform.com
Description	
store-path	Users/root/Private/Mail

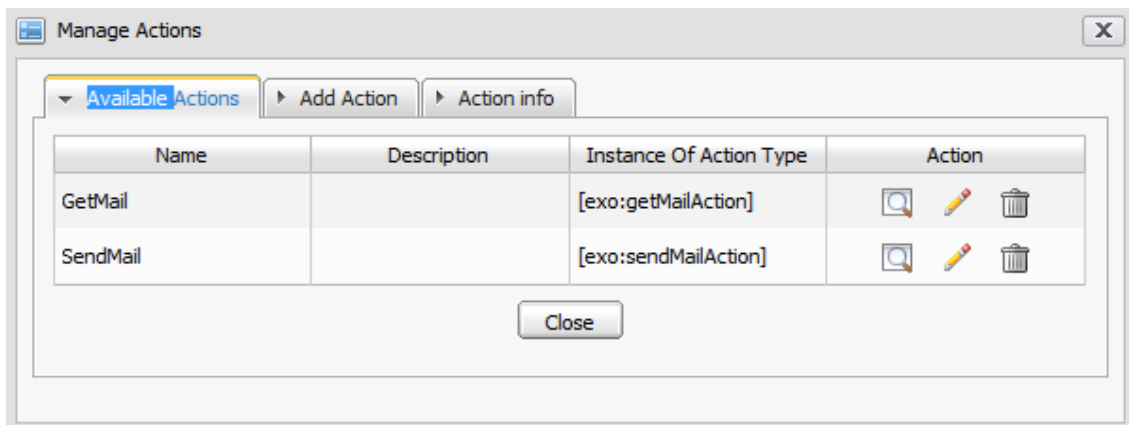
Below the table is a "Cancel" button.

Illustration 102: The Action info tab in the Manage Actions form

c) Edit an action

Do the following steps to edit an action:

Step 1: In the **Manage Actions** form, select the **Available Actions** tab:



Step 2: Click the edit icon on an action which you want to edit.

Action form

Id: GetMail

Name: GetMail *

Lifecycle: User Action (selected), schedule, node_added, node_removed, property_added *

Protocol: pop3

Host:

Port:

Folder: Inbox

User Name: support@exoplatform.com

Password:

Is deep: ☒

NodeTypes: + -

Description:

Illustration 103: The Edit action form

Step 3: Edit the properties in this form.

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

d) Delete an action

To delete an action, do as follows:

Step 1: In the **Manage Actions** form, select the **Available Actions** tab.

Step 2: Click  corresponding to the action that you want to delete.

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


3.3.7.6 View Node Properties

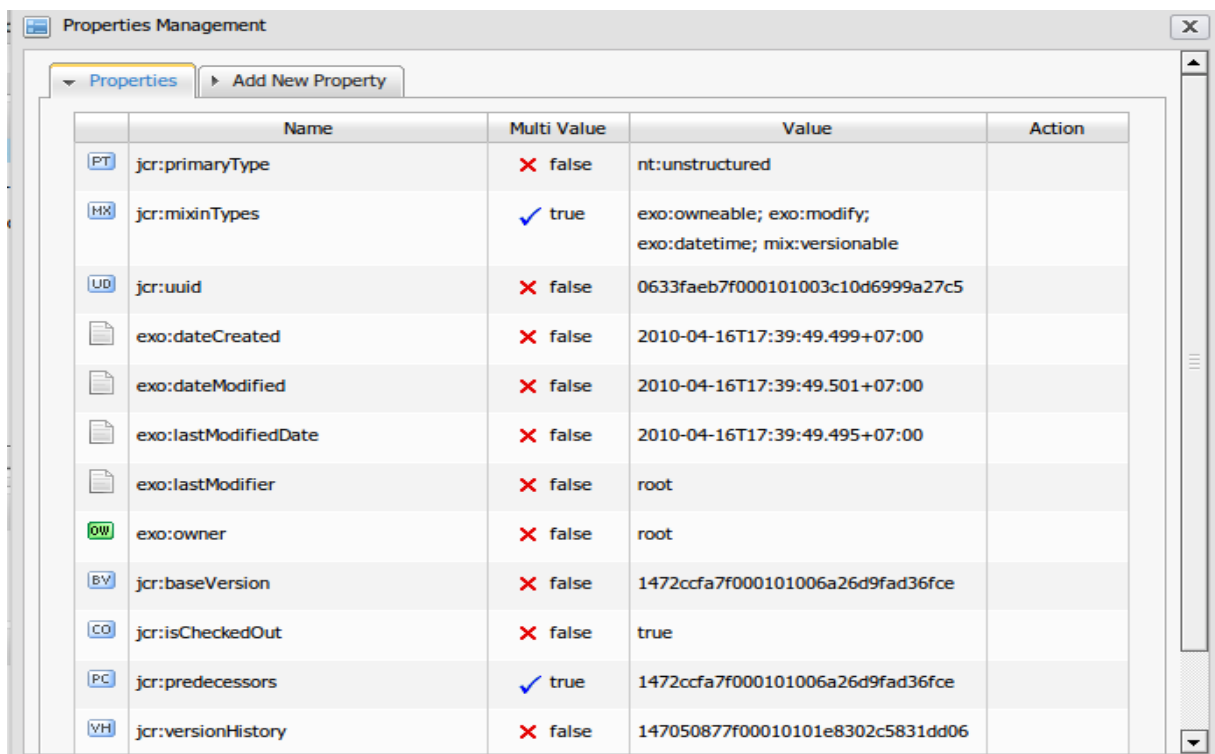
This function enables you to view all properties and values of a node. In addition, it is to add more properties for the node.

Do as follows:

Step 1: Select a node that you want to add more properties for the node.

Step 2: Select the **Admin** tab to show available actions on the **Action** bar.

Step 3: Click  View Node Properties to show the **Properties Management** form:



























	Name	Multi Value	Value	Action
	jcr:primaryType	 false	nt:unstructured	
	jcr:mixinTypes	 true	exo:owneable; exo:modify; exo:datetime; mix:versionable	
	jcr:uuid	 false	0633faeb7f000101003c10d6999a27c5	
	exo:dateCreated	 false	2010-04-16T17:39:49.499+07:00	
	exo:dateModified	 false	2010-04-16T17:39:49.501+07:00	
	exo:lastModifiedDate	 false	2010-04-16T17:39:49.495+07:00	
	exo:lastModifier	 false	root	
	exo:owner	 false	root	
	jcr:baseVersion	 false	1472ccfa7f000101006a26d9fad36fce	
	jcr:isCheckedOut	 false	true	
	jcr:predecessors	 true	1472ccfa7f000101006a26d9fad36fce	
	jcr:versionHistory	 false	147050877f00010101e8302c5831dd06	

Illustration 104: The Properties Management form

Details:

Properties tab	To display all properties and values of a node.
Add new property tab	To add more properties for the node.

Step 4: To add new properties, you move to the **Add new property** tab:

The screenshot shows the 'Properties Management' dialog box with the 'Add New Property' tab selected. The form contains the following fields and controls:

- Namespace:** A dropdown menu with 'dc' selected.
- Name:** A text input field containing 'New Property'.
- Type:** A dropdown menu with 'String' selected.
- Multiple:** A dropdown menu with 'true' selected.
- Value:** A text input field with an asterisk and a plus icon to its right.
- Buttons:** 'Save', 'Reset', and 'Cancel' buttons at the bottom.

Illustration 105: The Add New Property tab in the Properties Management



Step 5: Select the namespace for properties.

Step 6: Input a new property for the **Name** field.

Step 7: Select a type for a property:

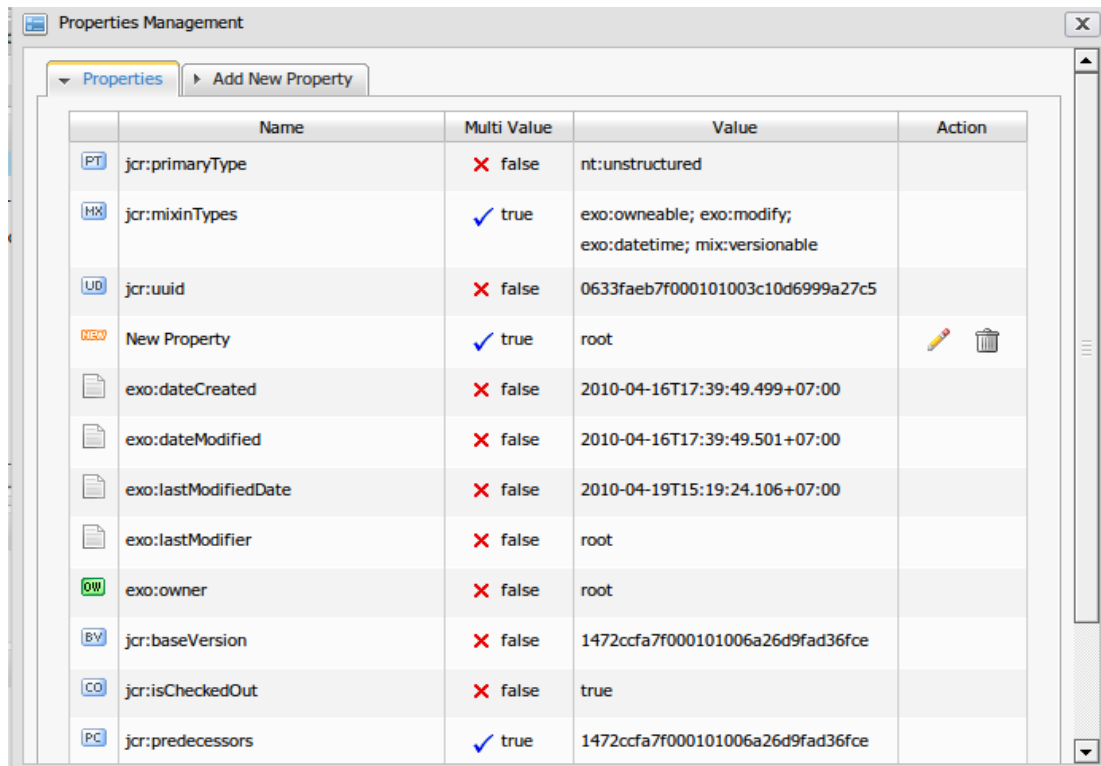
The screenshot shows a dropdown menu for selecting a property type. The menu is open, showing the following options:

- String (highlighted)
- Binary
- Boolean
- Date
- Double
- Long
- Name
- Path
- Reference

Step 8: Input a value for this property. Click  to add more values for this property or click  to delete this value.

Step 9: Click **Save** to accept the inputted values, or **Reset** to clear inputted values.

After adding a new property for a node, you will be redirected to the **Properties** tab that lists all properties of this node:



In this tab, you can:

Edit the added property clicking in the Action column; or

Delete the added property clicking .

3.3.7.7 Export nodes

This function is used to export a node into .xml or zip file

Do as follows:

Step 1: Select a node that you want to export.

Step 2: Select the **Admin** tab.

Step 3: Click the Action bar to show the **Export Node** form:

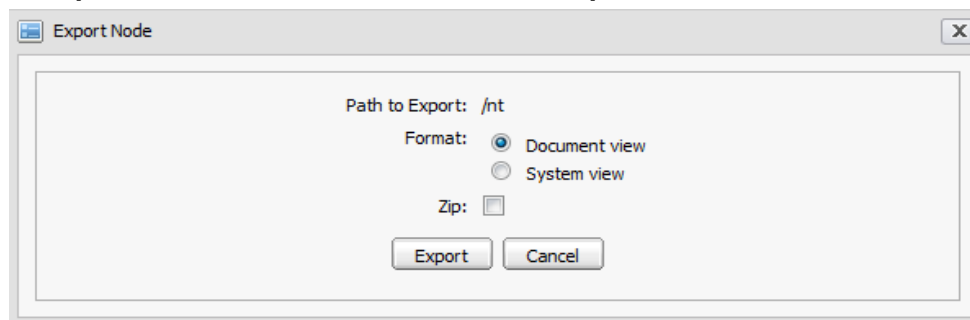


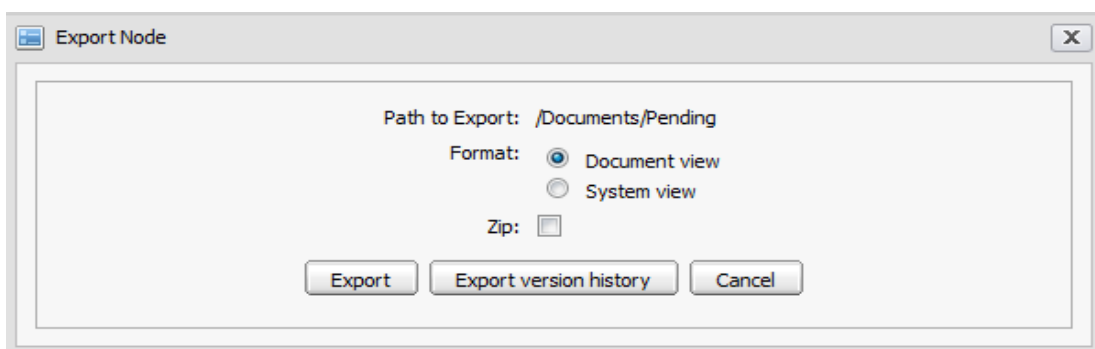
Illustration 106: The Export Node form

Details:

Path to Export	The path of a node to export.
Format	The format of the node.
Document View	Each node is a tag and properties of that node are considered to be elements of that tag.
System view	Each node and each property of that node is included in a different tag.
Zip	A node will be exported in zip type.

Step 4: Click **Export**, and select the location to save the file.

Note: If the current node or some of its child nodes have versions, when export this node, the **Export Node** form appears:



It has more **Export version history** buttons. It allows to export the history of current node and its children.

3.3.7.8 Import nodes

This function is used to import the nodes in xml format into JCR Explorer system.

Do the follows:

Step 1: Select the location that you want to import a node.

Step 2: Select the **Admin** tab.



Step 3: Click . The **Import Node** form will be displayed:

Illustration 107: The Import Node form

Step 4: Click the **Browse...** button to select a file you want to import.

Step 5: Click  icon to upload the selected file.


Step 6: Select the UUID behavior from the drop-down list.

Create new: New node will be created with new UUID.

Remove existing: New node will be created in the selected path with the UUID of exported node.

Replace existing: Exported node will be replaced by the imported node

Throw Exception: If you select this behavior, there is a message alert that you can not import this file.

Step 7: Click the **Browse...** button to select a version history that you want to import, then click the  to upload the selected file.

Step 8: Select a format in the **Format** field.

Step 9: Click **Import** to complete importing a file.

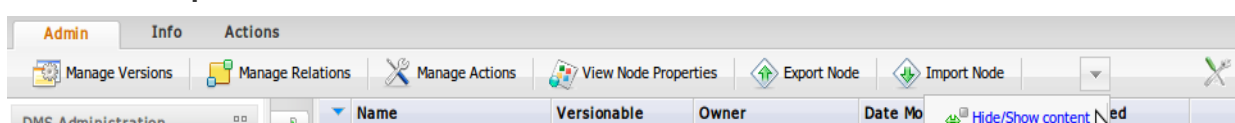
3.3.7.9 Hide/Show content


This function is used to hide or show node.

To hide node, do the following steps:

Step 1: Select the node that you want to hide.

Step 2: Select the **Admin** tab.

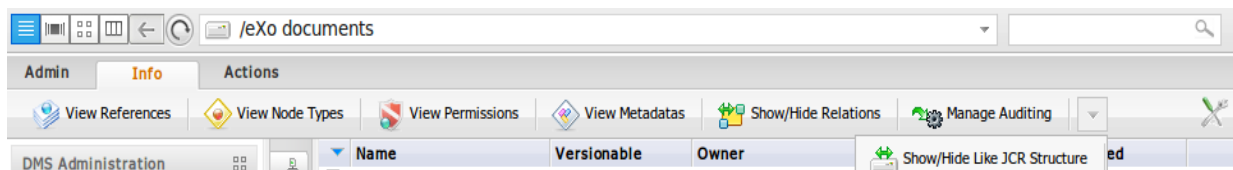


Step 3: Click  on the Action bar to hide a node. A pop-up message will appear to inform that you added the hidden node successfully.

Step 4: To show a node, click  again.

3.3.8 Info

This tab provides actions that are used to manage the node's information, such as view reference, view node type, view properties, and more.

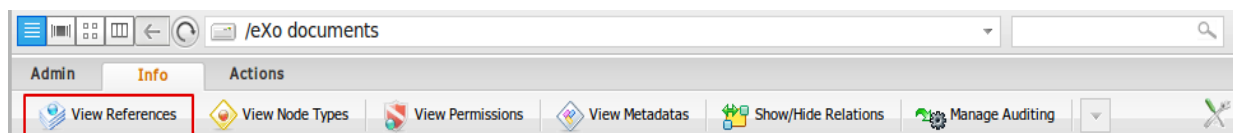


3.3.8.1 View Referenced documents


Do the following steps to view referenced documents:

Step 1: Select a node which is added to a category.

Step 2: Select the **Info** tab to show the **View References** action.



Step 3: Select a category.

Step 4: Click  on the Action bar to show the References List form. This form will list the the path to each document in the selected category.

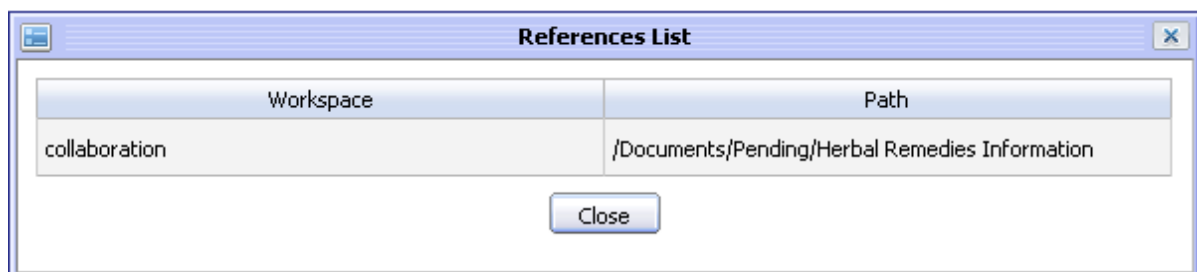


Illustration 108: The References List Form

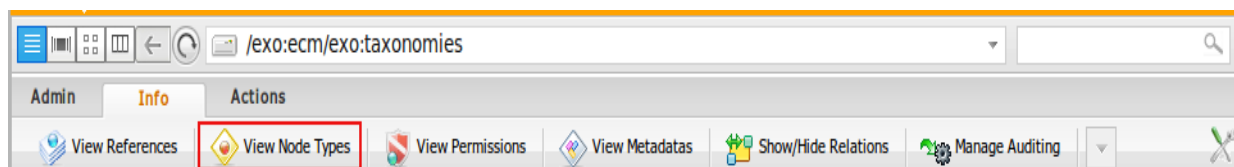
3.3.8.2 View Node Types

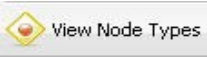
This function is used to view detail information of a node.

Do as follows:

Step 1: Select a node that you want to view node types.

Step 2: Select the **Info** tab to show some actions on the **Action** bar.



Step 3: Click  to view detailed information of the selected node. The **Node type information** form appears:

NodeType Information

exo:article | exo:modify | exo:datetime | exo:owneable | mix:votable | mix:commentable

Name	Primary Item Name	Parent types	Mixin Node Type	Orderable Children
exo:article	N/A	mix:referenceable exo:rss-enable nt:base	✗ false	✗ false

Node Property Definition

Name	Type	Man	Pr	AC	Mul	DV	CV
jcr:uuid	String	✓ true	✓ true	✓ true	✗ false		
exo:text	String	✗ false	✗ false	✗ false	✗ false		
exo:summary	String	✗ false	✗ false	✗ false	✗ false		
exo:title	String	✓ true	✗ false	✗ false	✗ false		
jcr:mixinTypes	Name	✗ false	✓ true	✗ false	✓ true		
jcr:primaryType	Name	✓ true	✓ true	✓ true	✗ false		

Child Node Definition

Name	OPV	MAN	PR	AC	DNT
COPY		✗ false	✗ false	✗ false	exo:article

Close

Illustration 109: The Node Type Information form

Step 4: Click each tab to view information of the node type.

3.3.8.3 View Permissions


This function allows Administrator to establish the right for each node.

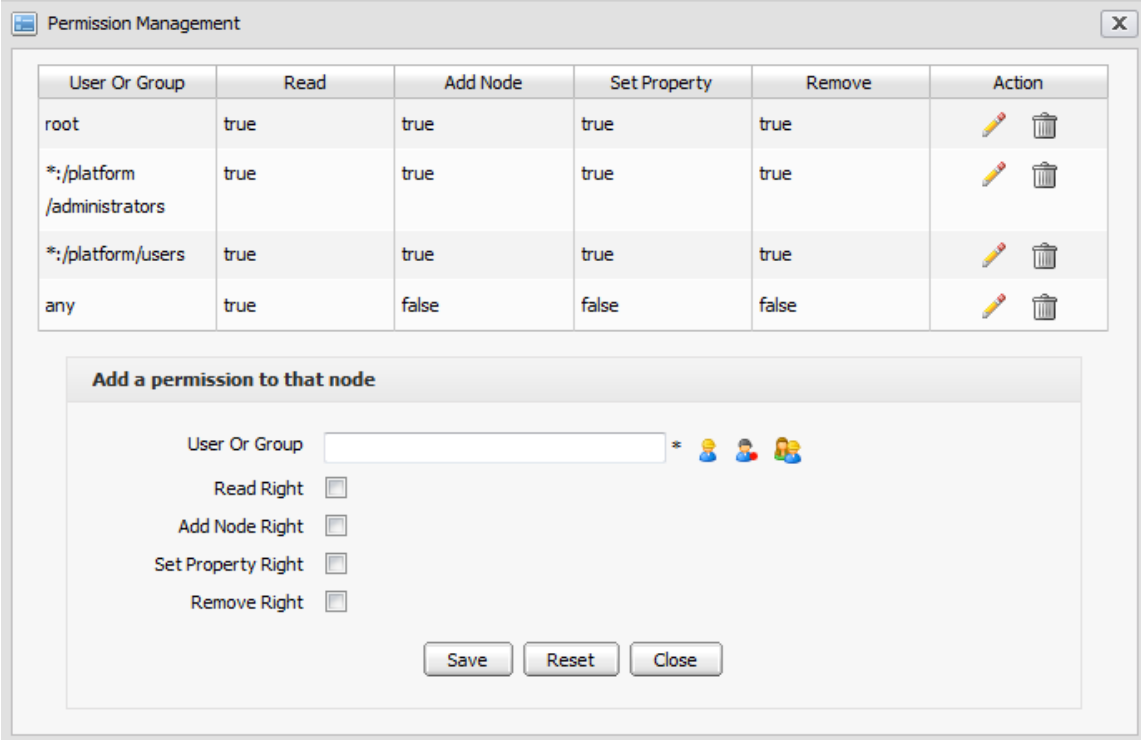
a) View permissions of a node

To view permissions of a node, do as follows:









Step 1: Select a node that you want to view permissions.

Step 2: Select the **Info** tab to show some actions on **Action** bar.




Step 3: Click  **View Permissions** on the Action bar to show the **Permission Management** form:



The screenshot shows the 'Permission Management' dialog box. It contains a table with columns: User Or Group, Read, Add Node, Set Property, Remove, and Action. Below the table is a section titled 'Add a permission to that node' with a text input for 'User Or Group', a dropdown for permissions (Read, Add Node, Set Property, Remove), and checkboxes for each. At the bottom are 'Save', 'Reset', and 'Close' buttons.

User Or Group	Read	Add Node	Set Property	Remove	Action
root	true	true	true	true	 
*:/platform /administrators	true	true	true	true	 
*:/platform/users	true	true	true	true	 
any	true	false	false	false	 

Add a permission to that node

User Or Group *   

Read Right ☐

Add Node Right ☐

Set Property Right ☐

Remove Right ☐

Illustration 110: The Permission Management form


In this form, you can view the current permission of the selected node. In addition, you also can add rights for another users/ groups if you want.

b) Add permissions for a node

Do the following steps to add permission for a node:

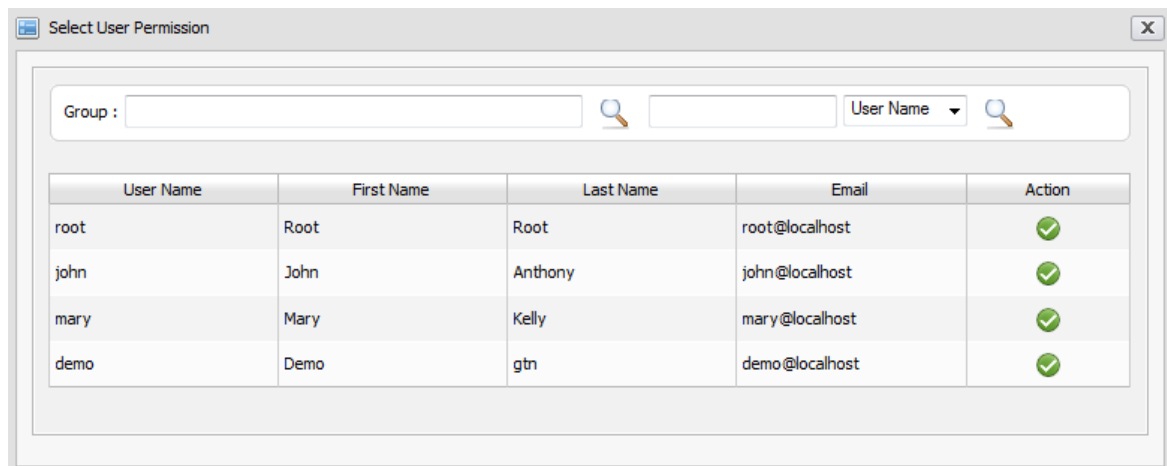
Step 1: Select a node that you want to add permission

Step 2: Select **Info** tab to show some actions.

Step 3: Open **Permission Management** form by clicking the  **View Permissions** on the **Action** bar.

Step 4: Show the **Select User Permission** form by clicking the icon  next to the

User Or Group field:



The dialog box titled "Select User Permission" contains a search bar with "Group :" and "User Name" fields, each with a magnifying glass icon. Below the search bar is a table with the following data:






User Name	First Name	Last Name	Email	Action
root	Root	Root	root@localhost	
john	John	Anthony	john@localhost	
mary	Mary	Kelly	mary@localhost	
demo	Demo	gtn	demo@localhost	

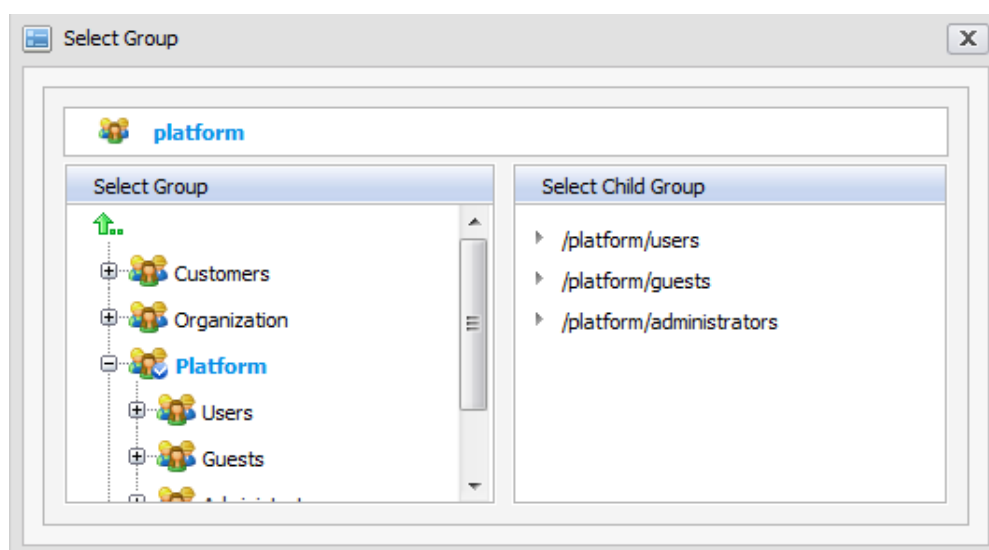
Illustration 111: Select User Permission form

Step 5: Click  to select users in the list.

To select users in a specific group, there are two ways:

The 1st way:


1. Enter the group name in the **Group** field. For an example, you can enter a group named **/platform/users**, then press **Enter** key. All users in this group are listed in a table below.
2. Click  next to the **Group** field to open the **Select Group** form that is used to select a group with a specific child group:





The dialog box titled "Select Group" shows a tree view on the left under the heading "platform". The tree includes "Customers", "Organization", "Platform" (selected), "Users", and "Guests". On the right, under the heading "Select Child Group", there is a list of child groups: **/platform/users**, **/platform/guests**, and **/platform/administrators**.

3. Select one group on the left panel and a child group on the right panel. All users of the selected group are listed in a table.

The 2nd way:

1. Select information of users in select-box (User Name, First Name, Last Name, Email).
2. Put the key word related to the expected user in text box.
3. Click  to show matched users in the table under.

Step 6: Show the **Select membership** form by clicking  next to the **User Or Group** field. This form allows you to select users with a specific membership of a group by selecting a group on the left panel and then select a membership on the right.

Step 7: Click the icon  to add all users/groups that will have the read permission on the node.

Step 8: To add more permissions such as: Add node right, Set property right, Remove right by checking the check-boxes corresponding to rights that you want to add.


Step 9: Click **Save** to accept inputted values. The new added permission is listed in the table above.

c) Edit permissions of a node

To edit permission of node, do as the following steps:

Step 1: Select a node that you want to edit permission.

Step 2: Select the **Info** tab.

Step 3: Click  to open '**Permission Management**' form.

Step 4: In the table of list permission, select the permission of a user or a group.

Step 5: Click the icon .

Step 6: Change permissions of that node.


Step 7: Click **Save** to finish editing.

d) Delete permissions of a node

To delete permissions of a node, do as follows:

Step 1: Select a node that you want to remove permissions.

Step 2: Select the **Info** tab on the Action bar.

Step 3: Click  **View Permissions** to open 'Permission Management' form.

Step 4: In the row of the permission you want to delete, click  .

Step 5: Click **OK** on the confirmation message to accept removing this permission, or **Cancel** to quit without deleting.

3.3.8.4 View Metadata

This function allows you to view or add metadata of a node with the node type **nt:file**, such as File, Podcast, child node of File Plan and uploaded file.

Do as follows:

Step 1: Select a nt:file node.

Step 2: Select the **Info** tab to show some actions.

Step 3: Click  **View Metadata** to open the **View Metadata** form:

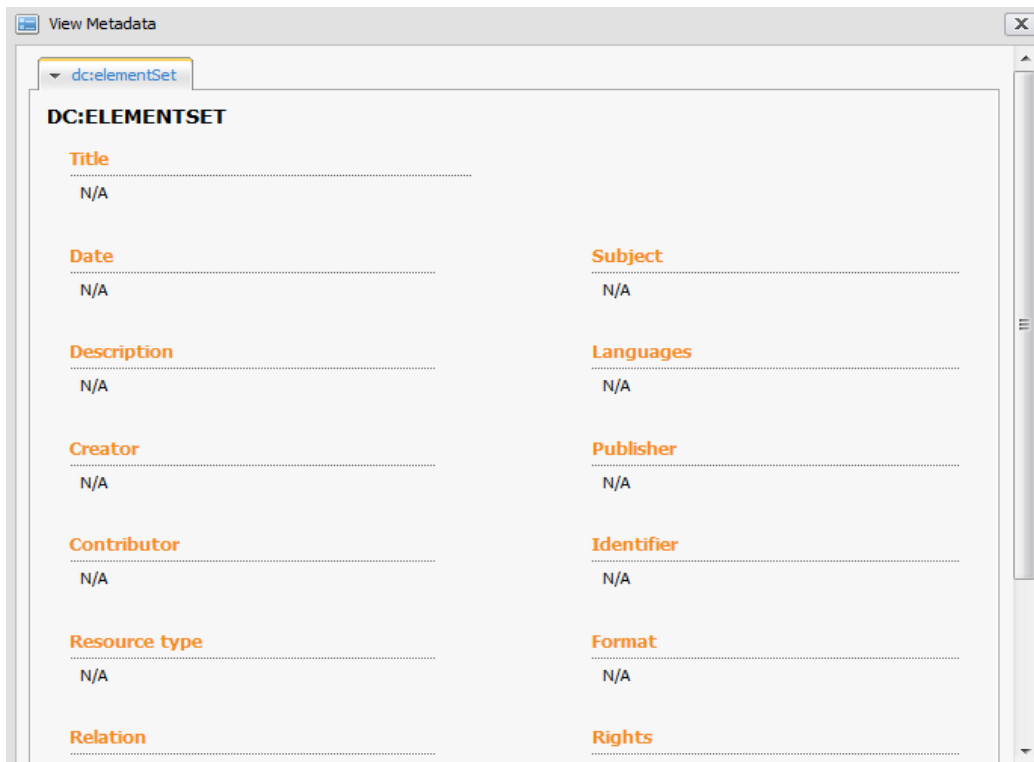


Illustration 112: The View Metadata form

Step 4: If you want to add metadata for a node, click **Add/Edit** at the bottom of View

Metadata form.

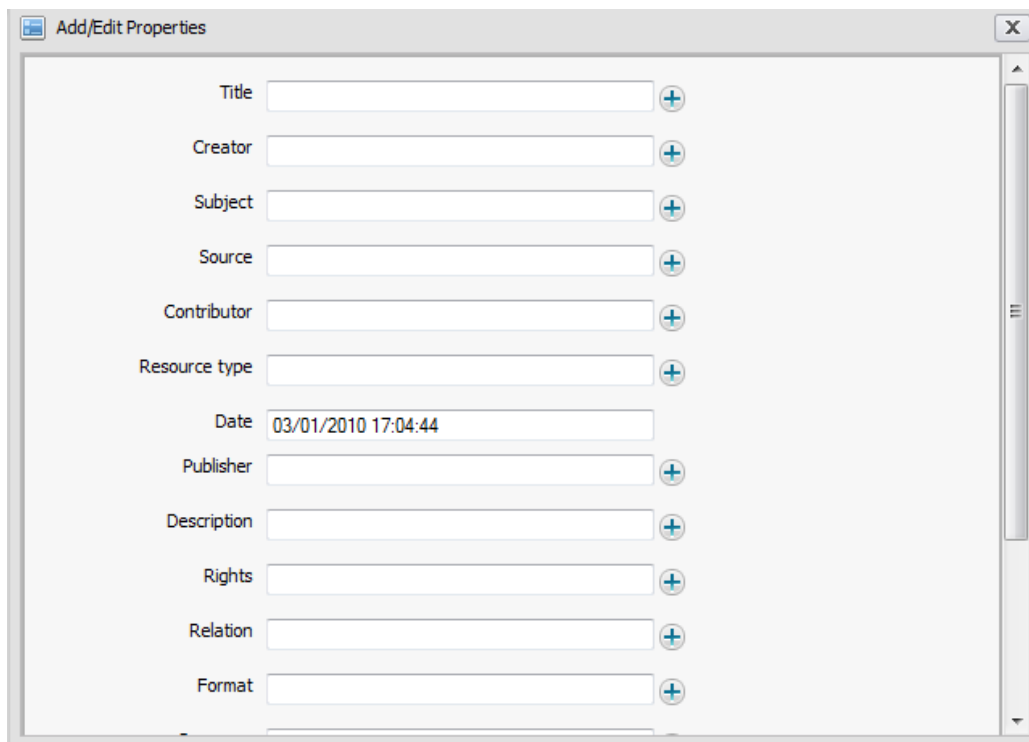



Illustration 113: The Add/Edit Properties form

Step 5: Fill out values in this form that you want to add metadata. Click  to add more metadata.


Step 6: Click **Save** to accept the inputted values.

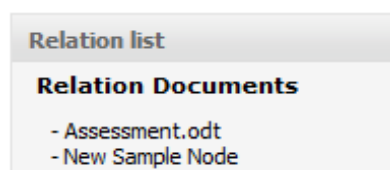
3.3.8.5 Show/Hide Relations

This function is used to show relation documents of a node. Do as the following steps to show/hide relations:

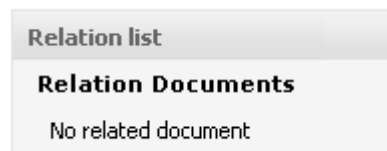
Step 1: Select a node that you want to view relations.


Step 2: Select the **Info** tab on the **Action** bar.

Step 3: Click  Show/Hide Relations to show relations. The relations of the node will be displayed in the sidebar:



If the node does not have any relation document, in sidebar, it shows “**No related document**” like:



Step 4: Click  Show/Hide Relations again to hide relations.

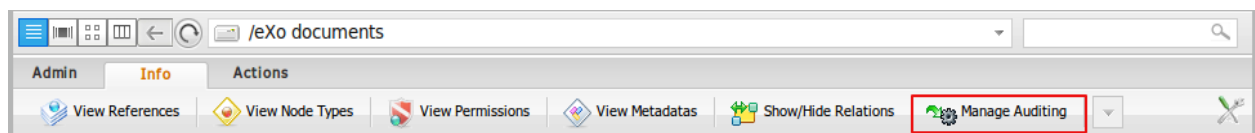
3.3.8.6 Manage Auditing

This function supports you to log property changes of a node. It helps you manage and view changes of a node better and effectively.

Do as follow:

Step 1: Select a node (on the left or right panel) that you want to manage auditing.

Step 2: Select the Details view and the **Info** tab to show some actions on the **Action** bar.



Step 3: Activate the selected node by clicking  Manage Auditing on the Action bar.

The Activate Auditing form will appear:

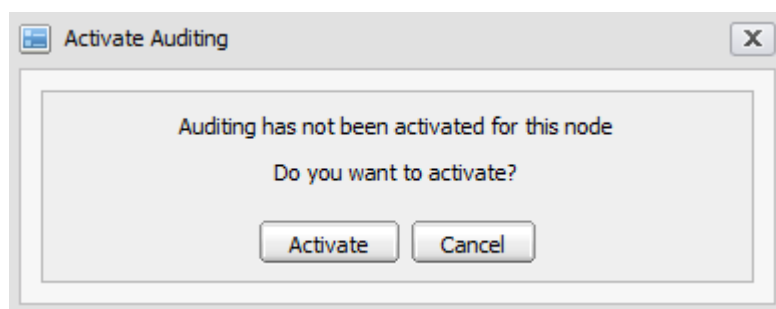



Illustration 114: The Activate Auditing form

Step 4: Click the **Activate** button to accept activating the selected node.

Step 5: Click  Manage Auditing again to view auditing information of the selected

node.

If the selected node has no property change, the **Auditing Information** form will show:

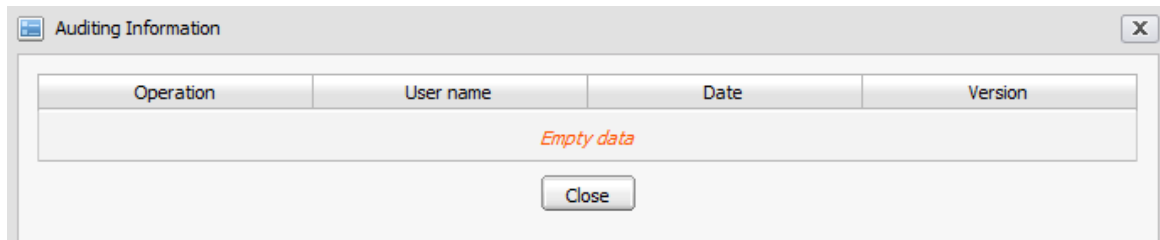
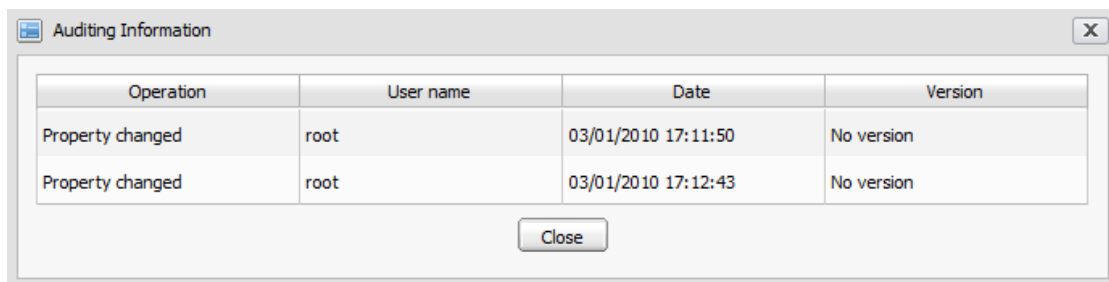


Illustration 115: The Auditing Information form

If the selected node has property changes, the **Auditing Information** form will list detail changes:



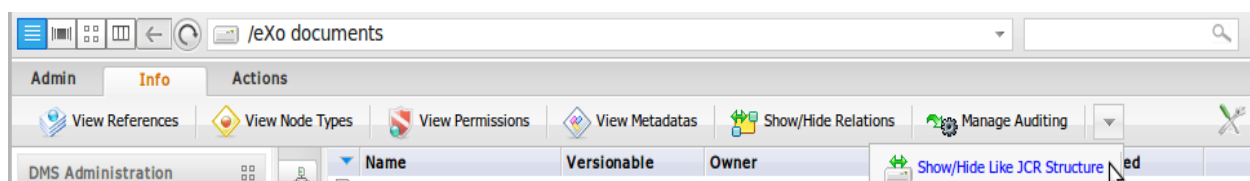
3.3.8.7 Show/Hide Like JCR Structure

This function allows you to view nodes in documents in the form tree structure


- ✓ To show like JCR Structure, do as follows:

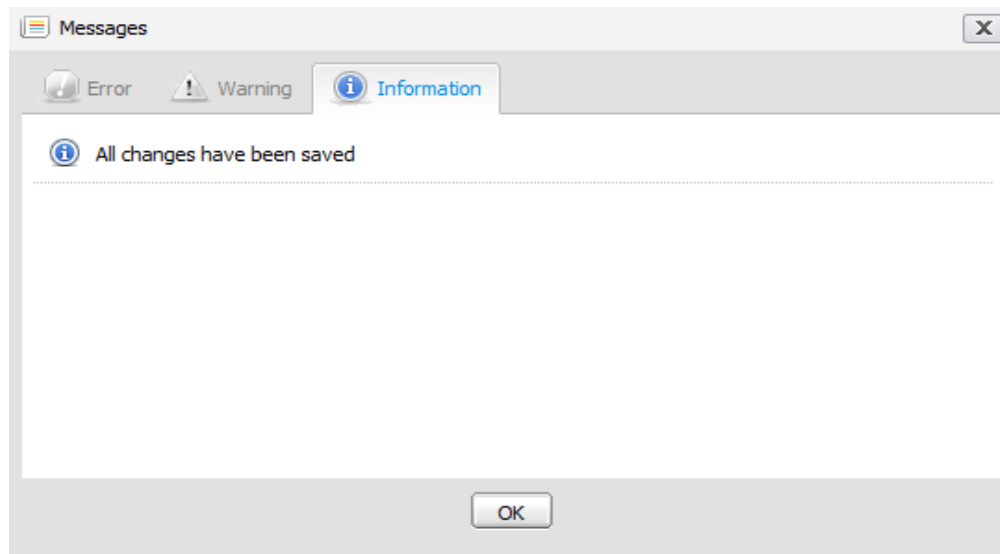
Step 1: Select a document that you want to show like JCR Structure

Step 2: Select the **Info** tab.



Step 3: Click  to show the JCR Structure.

Step 4: Click the icon  to save. An information message will be displayed:



- ✓ To hide JCR Structure:

Step 1: Click the selected document above.

Step 2: Click  again.

3.4 Manage Site Content by WebDAV

3.4.1 What is WebDAV?

WebDAV abbreviates for **Web** – based **D**istributed **A**uthoring and **V**ersioning which is used to publish and manage files and directories on the remote web server. Also, it allows groups of users to collaboratively perform these functions on a website.

WebDAV provides the following features:

- **Locking:** This function is to prevent the possibility of two or more collaborators overwriting their shared files.
- **Site manipulation:** WebDAV supports copy and move actions and the creation of 'collections' (e.g. File system directories).
- **Name space management:** This function enables you to copy and move Web pages within server's namespace.

3.4.2 Why you should use WebDAV?

You should use WebDAV to manage site content because of the following reasons:

- You can copy/paste a web content, folders/documents/media, etcon your desktop that will mirror your host – based site. WebDAV enables people to read and write documents over the web.
- Easily, quickly and flexibly manipulate actions on your site without directly accessing a site by using browsers. Files can be accessed from anywhere and are stored as in a local directories.
- Especially, you donot have to waste time for waiting to upload many pictures/documents into your site. You just need to copy those pictures, then paste all of them to the folder of the web content that you want.

3.4.3 How to use WebDAV in WCM?

WCM supports two ways to use WebDAV in sites management. Do the following steps:

The 1st way: This way is used when you are on a Window System and your computer has to be connected to the Internet or Intranet.

Step 1: Go into the **My Network Places** folder on your local computer. You will see all shared files and folders:

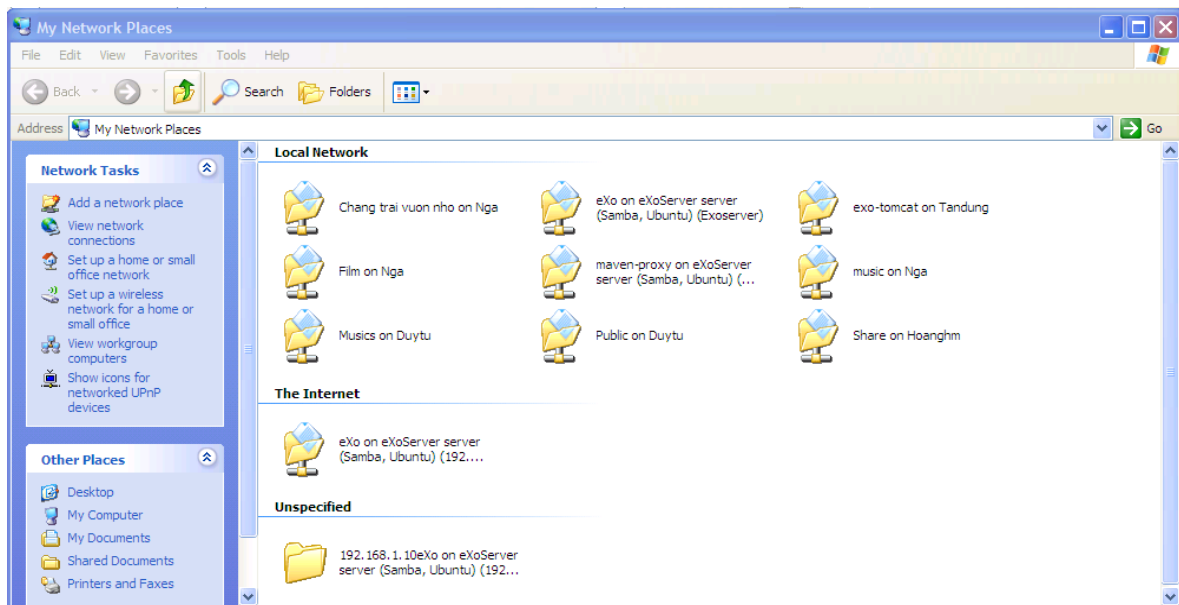


Illustration 116: Shared folders in My Network Places

To show a site list, do as following steps to use WebDAV:

Click the **Add a network place** link at the left to open the **Add Network Place Wizard** form:

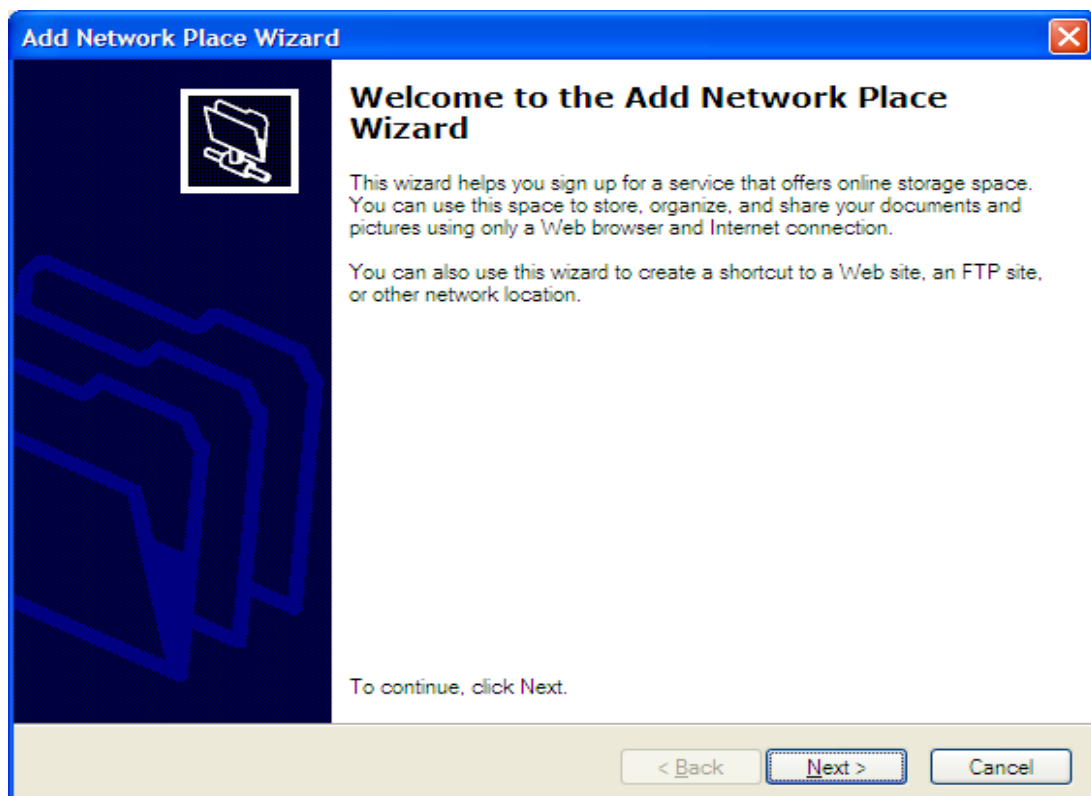


Illustration 117: The Add Network Place Wizard form

Click **Next** to open a form to choose the location that you want to create the network place:

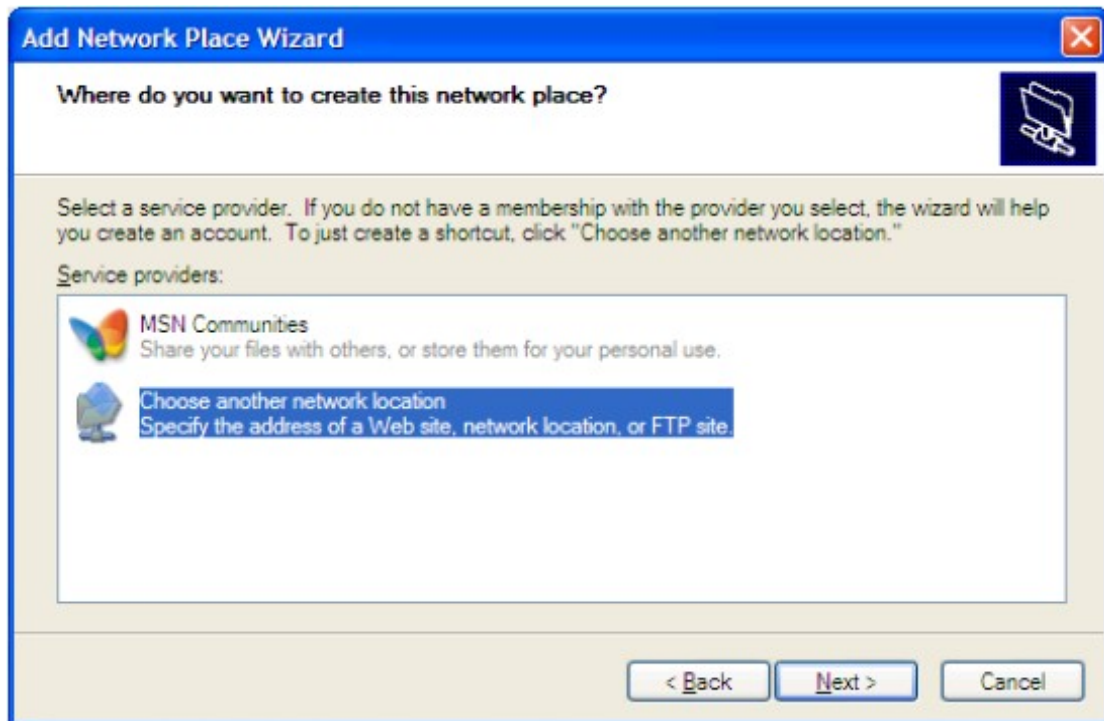


Illustration 118: The Add Network Place Wizard form

Select **Choose another network location** to just create a shortcut. Then you will be asked to enter an Internet or a network address to refer.

Enter or copy a link to view a site by WebDAV in a browser into 'Internet or network address' field. For an example, the link to view 'acme' site by WebDAV is:

<http://localhost:8080/portal/rest/private/jcr/repository/collaboration/sites/content/live/acme>

Click **Next** and wait some minutes. A folder named 'acme on localhost ' is corresponding to the inputted link will appear in the **My Network Places** folder like below. In WebDAV, each site will be a folder.

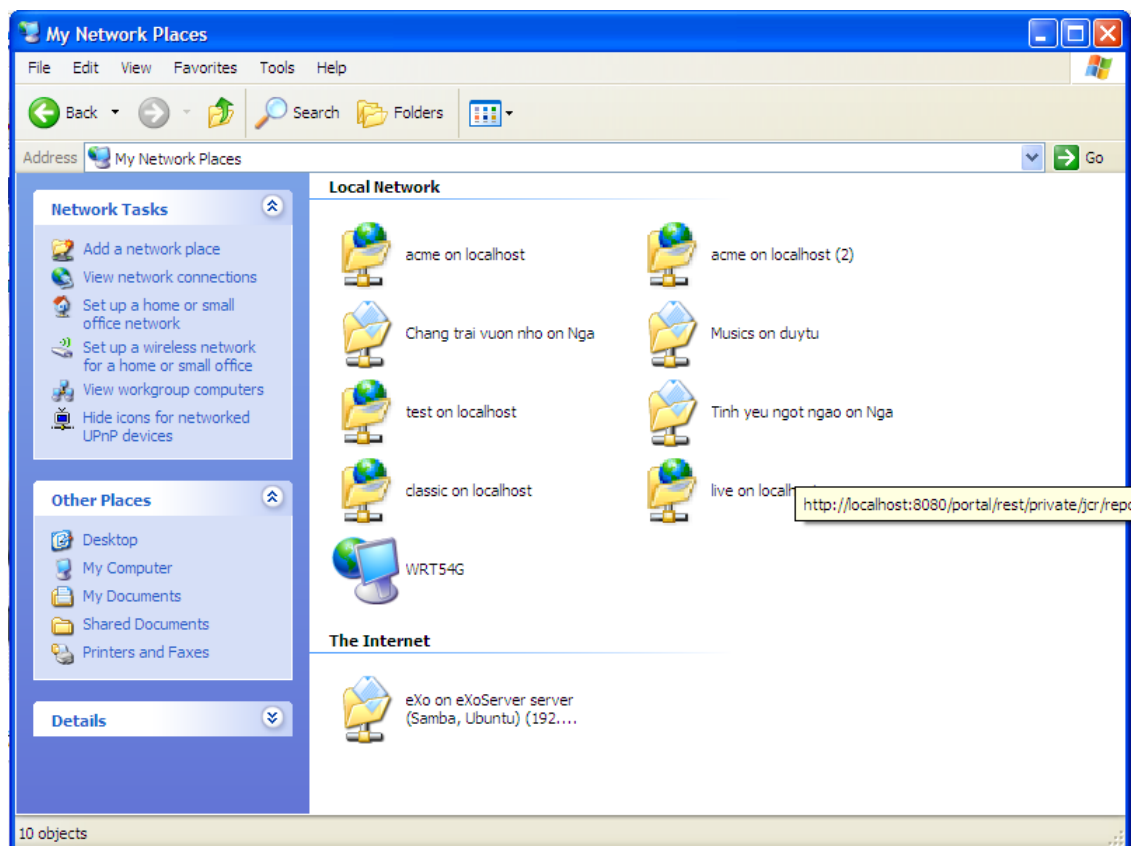


Illustration 119: My Network Places folder

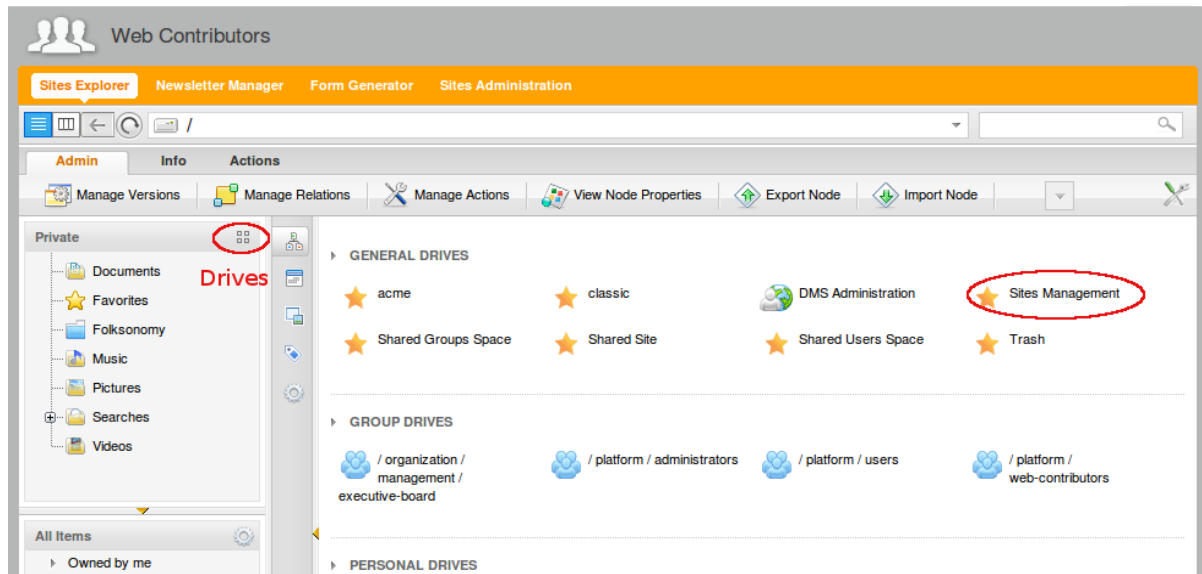
Go into the folder corresponding to the site which you want to take actions on it.

The 2nd way:

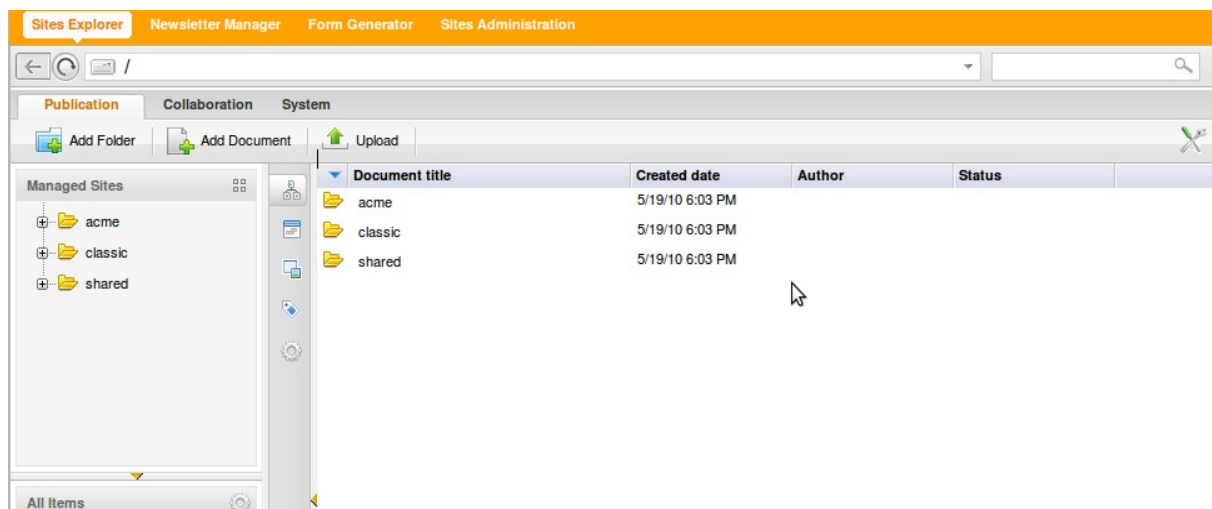
Step 1: Use the IE (Internet Explorer) browser to access <http://localhost:8080/portal>

Step 2: Select **Group | Sites Explorer** on the Administration bar.

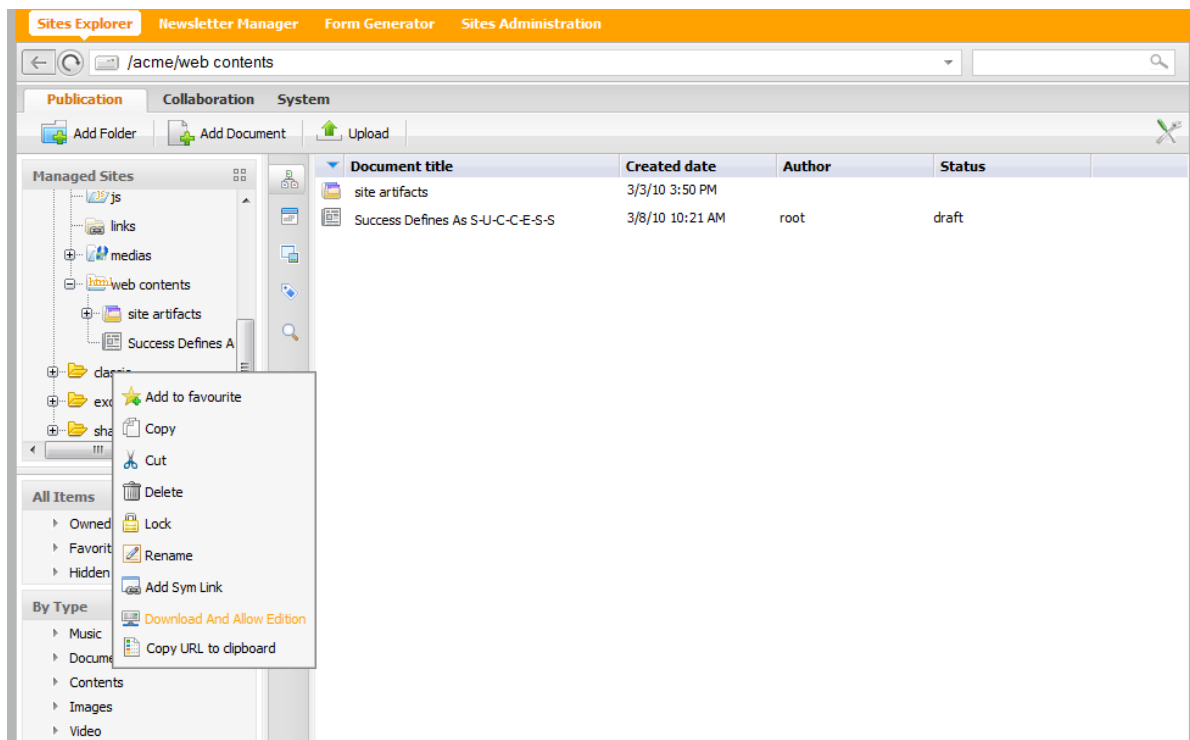
Step 3: Go to **Drive**, then select the **Sites Management** drive.



You will see all sites listed on the left panel like illustration below.



Step 4: Right-click a site that you want to view by WebDAV and select the **Download and Allow Edition** item in the menu:



The selected site will be viewed by WebDAV like the illustration below. With this view, you can access documents in directories/folders linked to a web server.

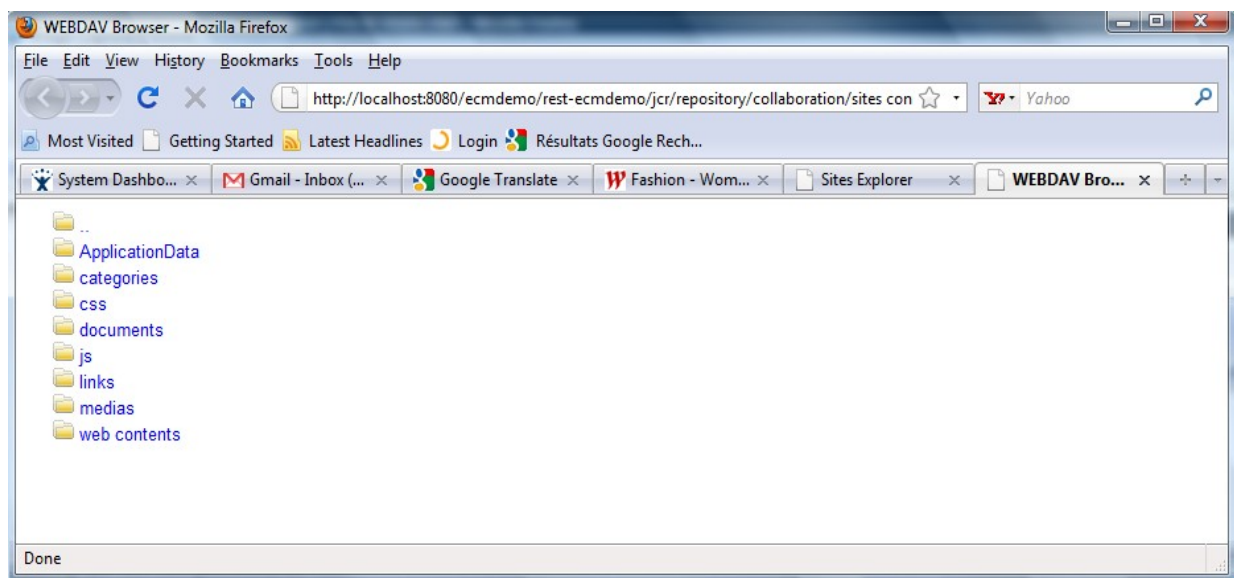


Illustration 120: The Default folders of a site in WebDAV view

3.4.4 Actions

Access into a site by WebDAV view, you also see all *default folders* of a site normally. Manipulating on WebDAV is as the same on folders. It means that you also can copy/paste, list folders, rename, and more for system directories.

3.4.4.1 Add a new web content into a specific site

This function is used to copy a web content (such as a .html file or a web content) from your local computer to 'web content' folder of a site.

Do the following steps:

Step 1: Access into a site by WebDAV , then go to **web content** folder of this site.

Step 2: Copy a web content file on your local computer and then paste to this folder. The copied file will be converted to web content automatically that is viewed by WebDAV. It means that copied web content is also a folder containing default folders: CSS, documents, js, media.

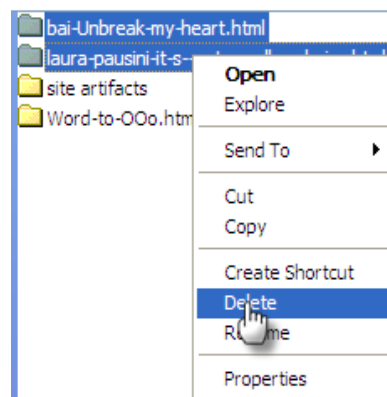
After adding a new web content successfully, you can view it as a folder by WebDAV view or view it as a web site by using a browser.

3.4.4.2 Delete a web content

This function supports webmasters to delete one or more web content at once.

Step 1: Go into the folder that contains web content that you want to delete.

Step 2: Then right-click a web content or more web content (keep Ctrl and select web content to select more web content at once) and select the **Delete** in the menu like deleting system folders and the selected folders will be removed from your site.



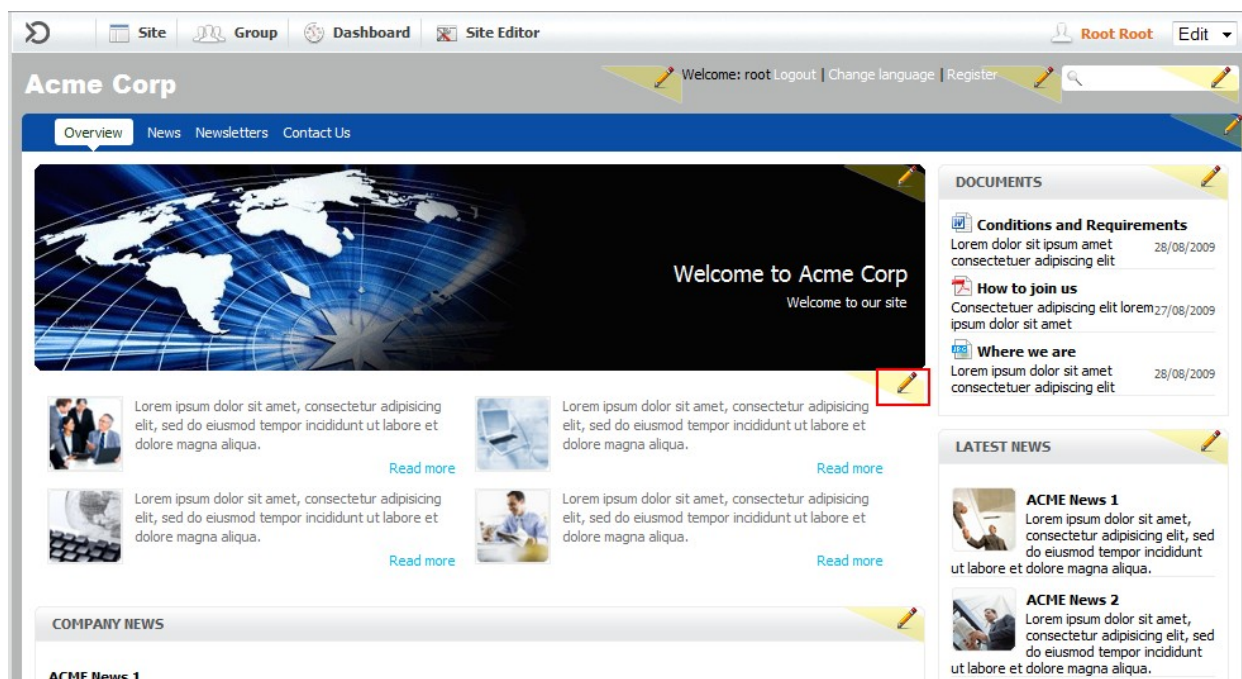
3.5 How to publish a site?


Besides publishing a web content in Sites Explorer, you also may use this function to publish a site to everyone or only some groups/users that you want. Use Content List Viewer – CLV to publish a web content.

CLV allows you to directly publish multiple content on the Overview page.

- ✓ To publish a site, do as follows:

Step 1: Turn on the **Edit** mode.



Step 2: Clicking the corresponding edit icon  on the element you want to edit. The **Content list viewer configuration** of that element will appear:

Content list viewer configuration

Contents selection

Mode ☒ By Folder ☐ By Contents

Folder path repository:collaboration:/sites content/ +

Order by Title

☐ Descendant ☒ Ascendant

Display settings

Header

Viewer template TwoColumnsCLVTemplate.gtmpl

Paginator template UIPaginatorDefault.gtmpl

Base path detail

Items per page 5

Show illustration ☒ Show title ☐

Show summary ☒ Show date created ☐

Show header ☐ Show link ☐


Show refresh button ☐ Read more ☒

Illustration 121: The Content list viewer configuration form

Details:

Mode	<p>This mode is to select web content for list viewer. There are two modes:</p> <ul style="list-style-type: none"> By Folder: This mode allows you to select a content folder in the Folder path field. By Content: This mode allows you to select by the content in a specific folder in Folder path field.
Folder path	The path to a location of a folder that contains the content.
Order by	The field is selected to sort content in the list viewer. You can sort content by Title, Date created or Date modified in ascending or descending order.
Header	The title for all content that are listed in List Viewer.
Viewer template	The template is used to view content list.
Paginator template	The template is used to view each content in list.
Items per page	The number of items will be displayed per page.
Show image	The option is to show or hide the illustration of each published web content/document.
Show summary	The option is to show or hide the summary of each web content/document.

Show header	The option is whether to show a header or not.
Show refresh button	The option is whether to show the refresh button at the left bottom of this page or not.
Show title	The option is to show or hide title of each published web content and/or document.
Show date created	The option is to show or hide the created date of each published web content/document.
Show link	The option is to show or hide the link of web content and/or document.
Read more	The option is to show or hide the Read more to read all the content of a web content and/or document.

Step 3: Browse the documents/ web content of an available site by clicking  next to the folder path field.

Step 4:

- If you select the **By folder** mode, select an available site on the left, then select a folder that contains content (documents and/or web content) on the right by clicking it.

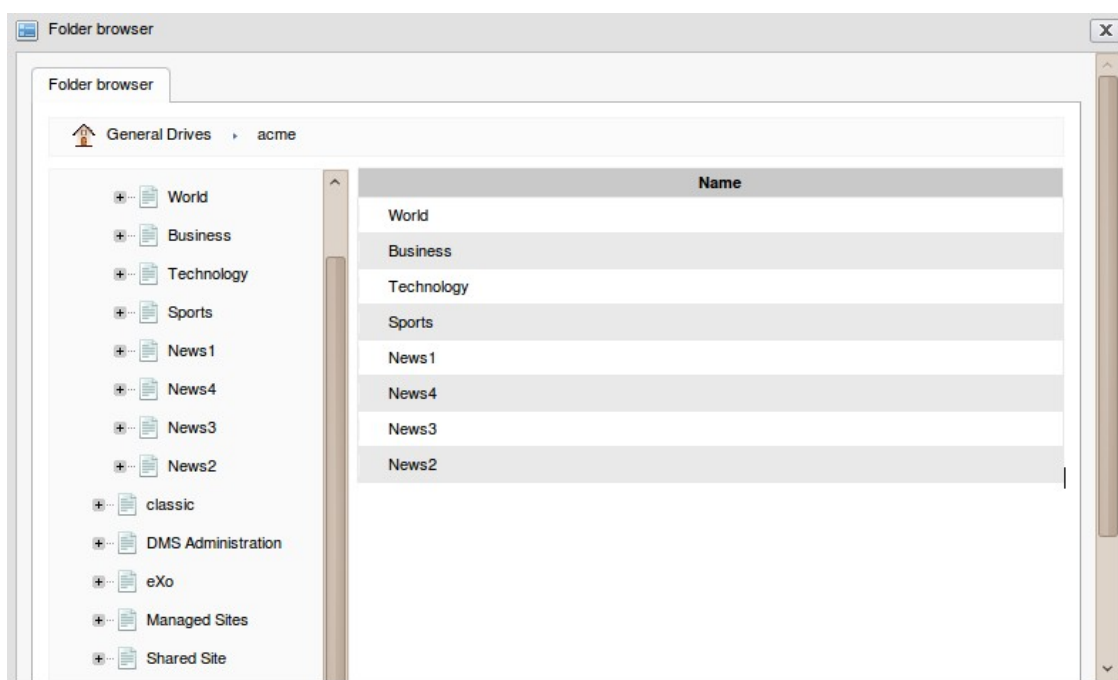
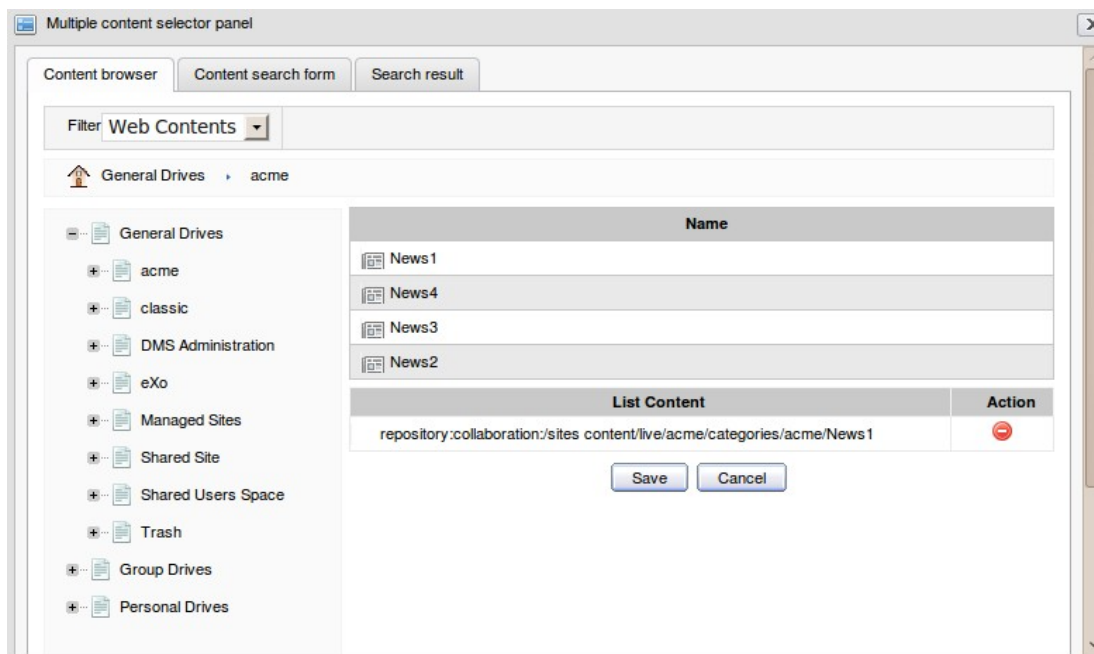


Illustration 122: The folder browser to view possible folders that can be selected

- If you select the **By content** mode, select an available folder from the left panel, all content in this folder will be listed on the right panel.



Step 5: Select content by clicking the content in the **Name** column and a message informs that you have successfully added it in List Content. The selected content is listed in **List Content**.

Step 6: Click **Save** to accept publishing content of the selected folders.

After publishing content successfully, the content of selected folder will be displayed in the **Overview** page.



*If you are turning on the **EDIT** mode, you will see all the **DRAFT** and **PUBLICATION** versions of the **Content List Viewer**, thus you can edit a draft version by clicking the **Edit**.*

*But if the **LIVE** mode is turned off, only the **PUBLICATION** versions are displayed.*

3.6 Newsletters

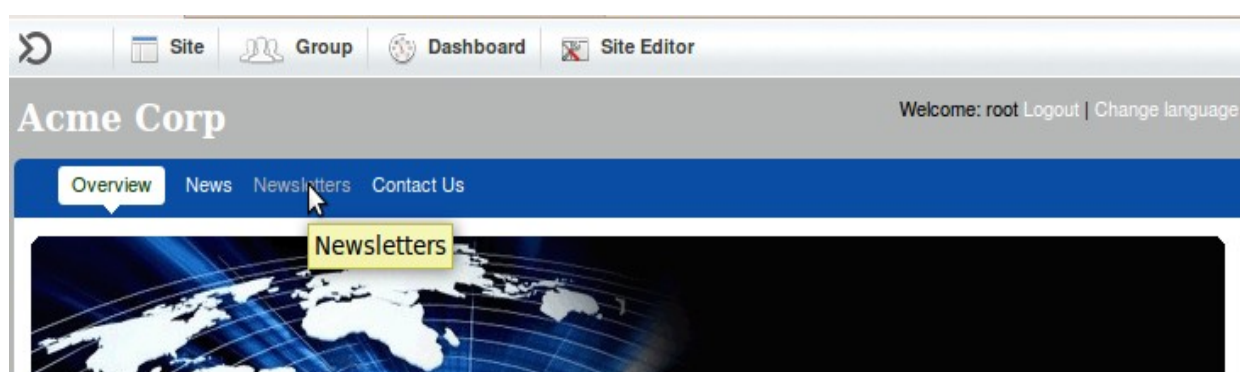
WCM provides a newsletter service aiming at helping users quickly get the updated newsletters from a website.

3.6.1 Newsletter Viewer

Users instantly get newsletters from your email in order to update the newest information about categories and subscriptions that users frequently care about.

Follow these steps to subscribe to newsletters from exoservice:

Step 1: Go to **Newsletters** on the navigation bar. The Newsletters page will appear:



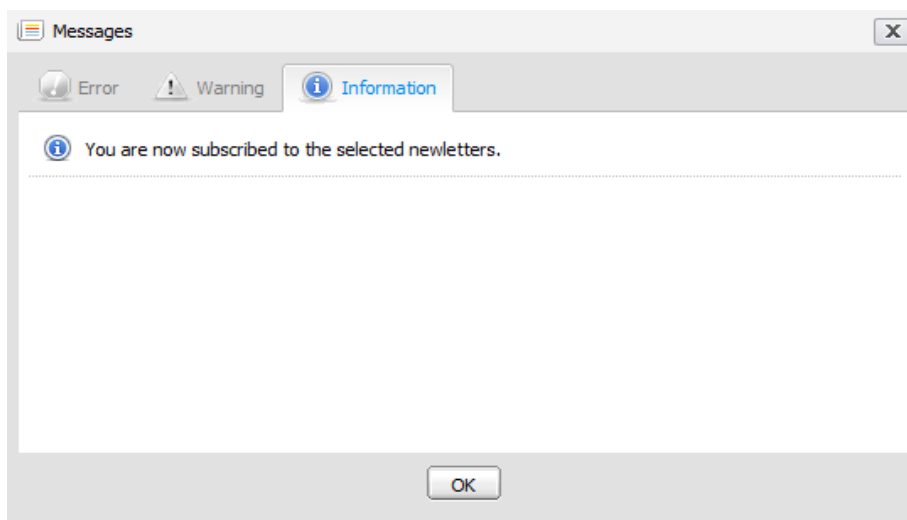
Marketing	
You want to know where we are, where we go ?	
Subscription	Check to subscribe
The market <i>What's on the market today ?</i>	<input type="checkbox"/>

General	
General information about us	
Subscription	Check to subscribe
Results <i>Monthly newsletter about our results and forecasts</i>	<input type="checkbox"/>
Check-List <i>Weekly newsletter with general topics</i>	<input type="checkbox"/>

Step 2: Enter your email address for the **Your Email** field.

Step 3: Select the check box corresponding to the subscription that you want to get newsletters.

Step 4: Click **Subscribe**. A message informing that you have just subscribed to the selected newsletter will appear.



Step 5: Click **OK** in the confirmation message. You can reselect the subscription that you want or donot want to receive newsletters by re-selecting the checkbox in the **Check to subscribe** column.

A screenshot of the 'Newsletters' page in the eXo platform. The page has a blue header with navigation links: 'Overview', 'News', 'Newsletters' (selected), and 'Contact Us'. Below the header is a banner image with a world map and the word 'NEWSLETTERS'. Under the banner, there is a section for 'Your Email' with the email 'guynhlien.84@gmail.com' and a 'Forget this email' button. Below this is a 'Marketing' section with the text 'You want to know where we are, where we go ?'. It contains a table with two columns: 'Subscription' and 'Check to subscribe'. The table has one row for 'The market' with a checked checkbox. Below the 'Marketing' section is a 'General' section with the text 'General information about us'. It contains a table with two columns: 'Subscription' and 'Check to subscribe'. The table has two rows: 'Results' and 'Check-List', both with checked checkboxes. At the bottom of the page is a 'Change your subscriptions' button.

Step 6: Click **Change your subscriptions** to update your changes.

Step 7: Click **Forget this email** if you want to unsubscribe from newsletters.

3.6.2 Newsletter Manager

WCM facilitates administrators to easily and quickly manage and control newsletters by following the steps below:

Go to **Groups | Newsletter Manager** on the Administration bar. The Newsletter Manager page will appear:

Subscription	Number of User	Awaiting Letter
The market	1	0


Subscription	Number of User	Awaiting Letter
Results	0	0
Check-List	0	0

Illustration 123: The Newsletter Manager Page

3.6.2.1 Category

Administrators easily add new categories.

a) Add a new category

Step 1: Click  **New Category** on the action bar of the Newsletter Manager Page. The **Category** form will appear:

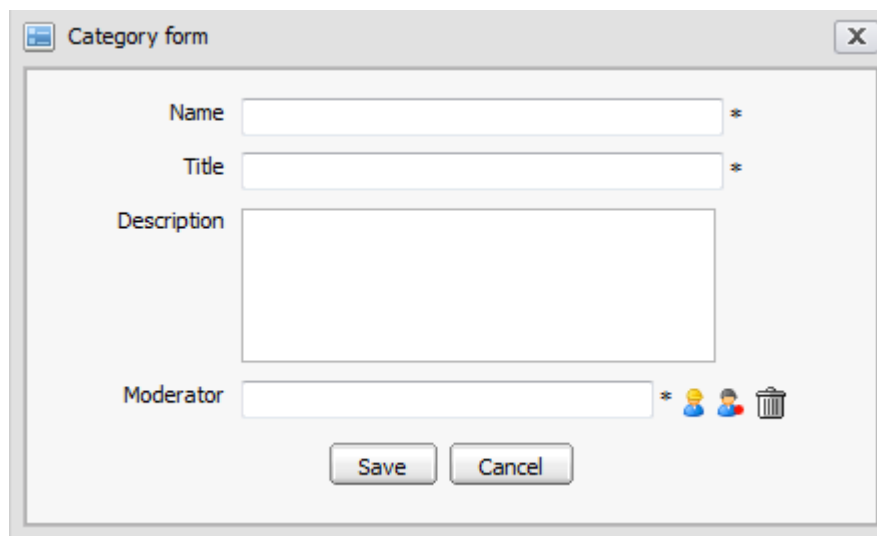



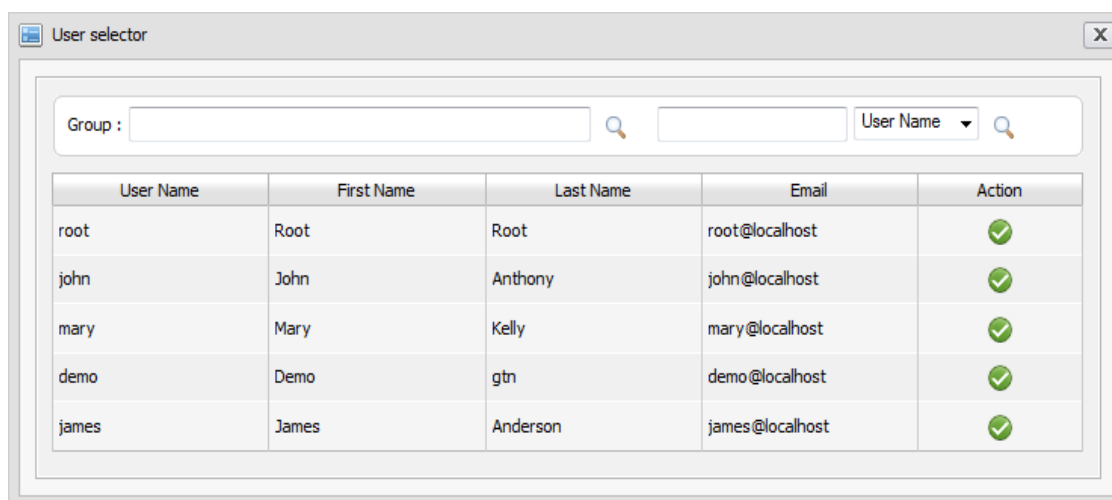
Illustration 124: The Category form

Details:

Name	The name of a category. This field is required.
Title	The title of a category. This field is required.
Description	The brief description about the category. This field isn't required
Moderator	Allows an administrator to select which memberships what group can manage this category.
Save	To accept adding a new category.
Cancel	Allows quitting the Category form without adding category.

Step 2: Input values for fields.

Select a moderator for a category by clicking  next to the **Moderator** field to select an user. The **User selector** form will appear:




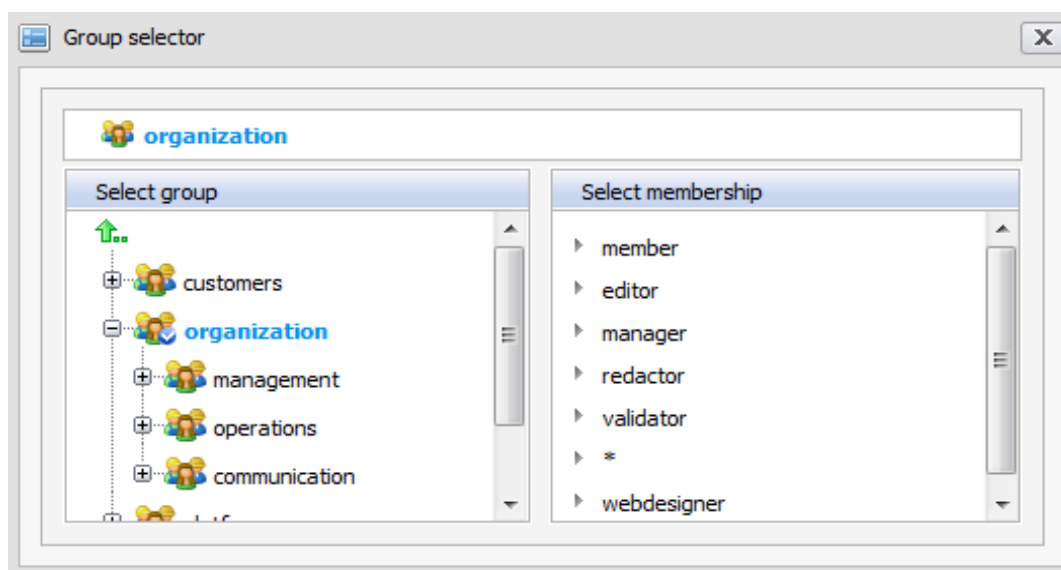
The 'User selector' window contains a search bar at the top with a 'Group' label and a 'User Name' dropdown. Below the search bar is a table with five columns: 'User Name', 'First Name', 'Last Name', 'Email', and 'Action'. The table lists five users: root, john, mary, demo, and james. Each user has a green checkmark in the 'Action' column.

User Name	First Name	Last Name	Email	Action
root	Root	Root	root@localhost	✓
john	John	Anthony	john@localhost	✓
mary	Mary	Kelly	mary@localhost	✓
demo	Demo	gtn	demo@localhost	✓
james	James	Anderson	james@localhost	✓

Illustration 125: The User selector form

Click  to select a user in the list.

Click  to select users in a specific group. The **Group selector** will appear:



The 'Group selector' window is divided into two main panels. The left panel, titled 'Select group', shows a tree structure of groups: 'organization' (selected), 'customers', 'management', 'operations', and 'communication'. The right panel, titled 'Select membership', shows a list of roles: 'member', 'editor', 'manager', 'redactor', 'validator', '*', and 'webdesigner'.

Illustration 126: The Group selector form

Select one group in the left panel and select a membership in the right panel. The membership and group that you have just selected will be displayed on the **Moderator** field.

After adding new categories, they will be added in the list of the categories.

Step 3: Click the category that you want to manage (for example, the **Fashion** category).



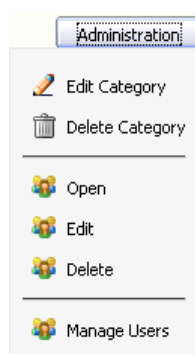
Here, you can create new subscriptions or newsletters for this category.

Step 4: Click the **Administration** button to open the menu which lists all actions that an administrator can take on this category.

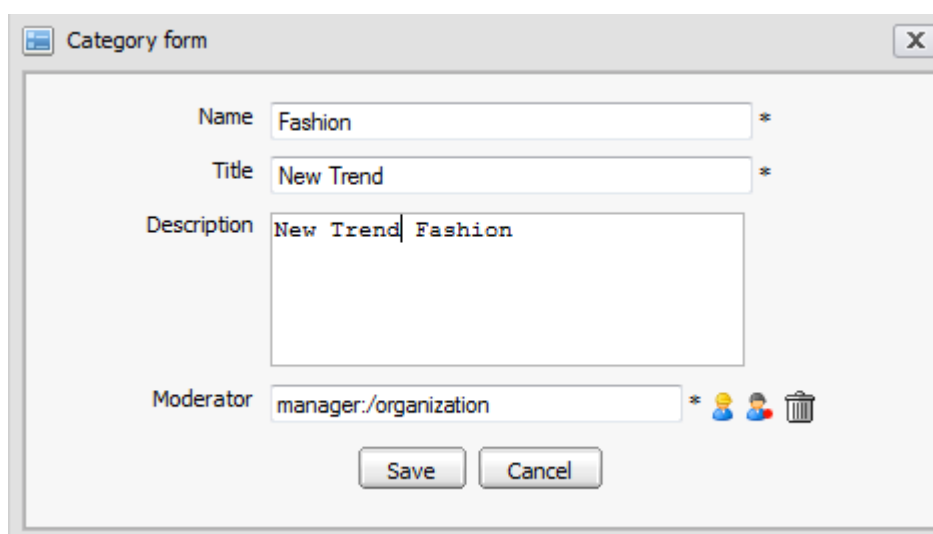
b) Edit a category

To edit a category, follow these steps:

Step 1: Click the **Administration | Edit Category**.



The **Category form** will appear:



Details:

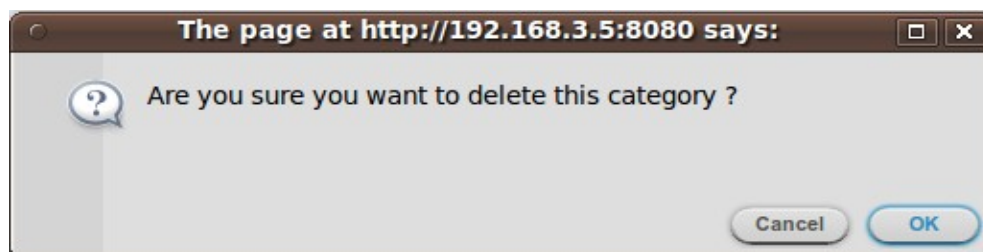
Name	The name of the category. This field can not be changed
Title	The title of the category. This field can be changed.
Description	The brief description about the category. This field can be changed.
Moderator	Allows an administrator to select which memberships in what group can manage this category by selecting membership and group. This field cannot be changed.
Save	To save editing a new category.
Cancel	Allows quitting the Category form without editing a new category.

Step 2: Change the values in the **Title** and **Description** fields if you want.

Step 3: Click **Save** to save all the changes, or **Cancel** to quit without saving any change.

c) Delete a category

Step 1: Click **Delete Category** in the menu. The confirmation message will appear:



Step 2: Click **OK** to accept deleting this category, or **Cancel** to quit without deleting.

d) Manage Users

Administrator easily manage users with some actions such as: edit, ban, remove ban or delete users.





Step 1: Click **Administration | Manage Users** in the menu. The **Manager Users** form will appear:

Email	Banned
quynhlien.84@gmail.com	false

Close

Illustration 127: The Manager Users form

Details:

Email	The email address of user who has subscribed this subscription.
Banned	There are 2 values: false means a user is allowed to get emails or true means a user isn't allowed to get.
	To edit this user.
	To ban a user to get emails.
	To unban a user to get emails.
	To delete a user that corresponds to the trash can icon you have just clicked.

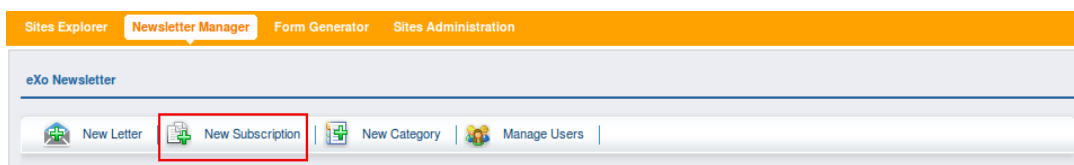
Step 2: Click **Close** to close this form.

3.6.2.2 Subscription

In each category, an administrator can add more new subscriptions for that category. There are two ways to add a subscription for a category:

The 1st way:

Click **New Subscription** on the action bar.



The **Subscription** form will appear:

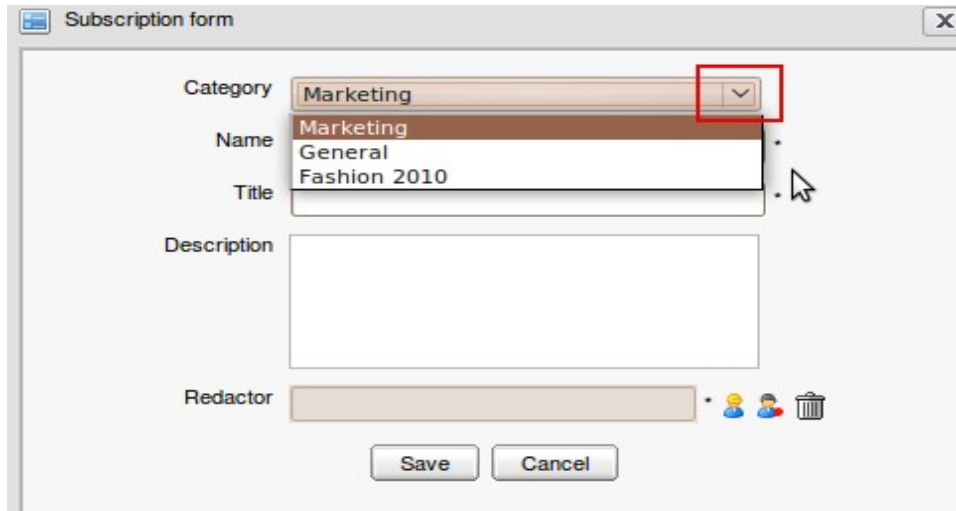
The screenshot shows a 'Subscription form' dialog box. It has a title bar with a close button (X). The form contains the following fields: 'Category' (a dropdown menu with 'Marketing' selected), 'Name' (a text input field with an asterisk indicating it is required), 'Title' (a text input field with an asterisk indicating it is required), 'Description' (a large text area), and 'Redactor' (a text input field with an asterisk and icons for user selection and deletion). At the bottom, there are 'Save' and 'Cancel' buttons.

Illustration 128: The Subscription form

Details:

Category	The category that contains this subscription.
Name	The name of the subscription. This field is required.
Title	The title of the subscription. This field is required.
Description	The brief description about the subscription. This field is not required.
Redactor	Allows an administrator to select which memberships in what group can manage this subscription by selecting membership and group. This field cannot be changed.

Step 1: Click  to select the category for which you want to create a subscription:



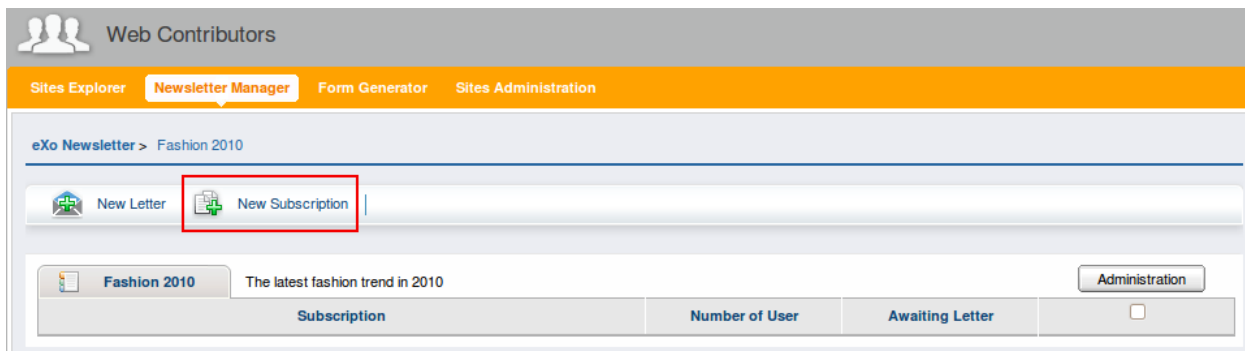
The image shows a 'Subscription form' dialog box. It contains the following fields: 'Category' (a dropdown menu with 'Marketing' selected and a red box around the arrow), 'Name' (a text field with 'Marketing' entered), 'Title' (a text field with 'General Fashion 2010' entered), 'Description' (a large empty text area), and 'Redactor' (a text field with a red box around it and icons for user selection). At the bottom are 'Save' and 'Cancel' buttons.

Step 2: Input values in the fields in this form.

Step 3: Click **Save** to accept creating a new subscription, or **Cancel** to quit without creating a new subscription.

The 2nd way:

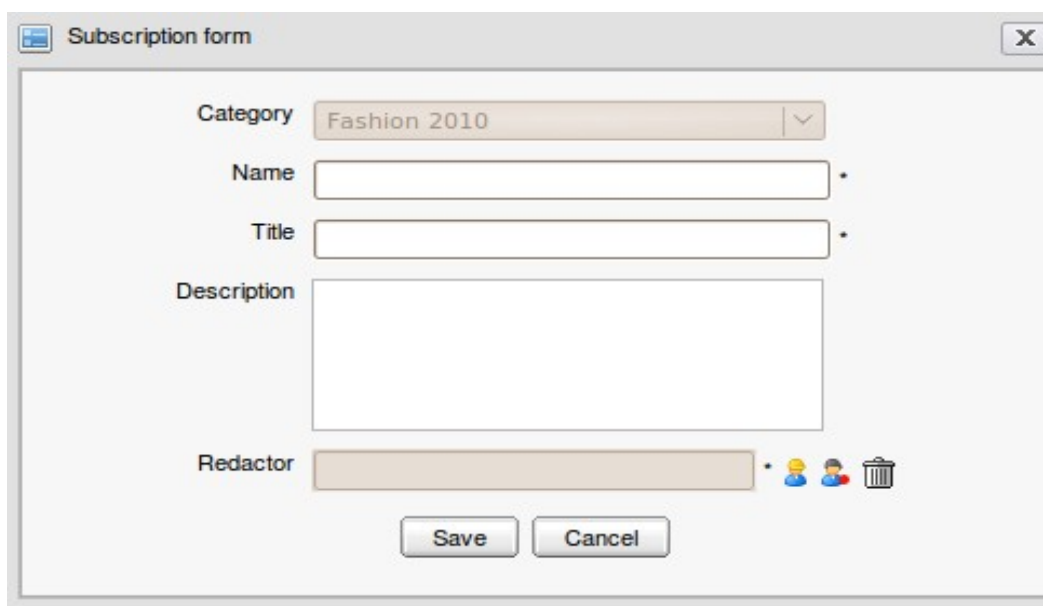
Click directly the category that you want to create a subscription.



The image shows the 'Web Contributors' interface. The 'Newsletter Manager' tab is active. The breadcrumb is 'eXo Newsletter > Fashion 2010'. The action bar has 'New Letter' and 'New Subscription' (highlighted with a red box). Below is a table with columns: 'Subscription', 'Number of User', 'Awaiting Letter', and 'Administration'. The first row shows 'Fashion 2010' with the description 'The latest fashion trend in 2010'.

Subscription	Number of User	Awaiting Letter	Administration
Fashion 2010			<input type="checkbox"/>

Click **New Subscription** on the action bar . The **Subscription form** will appear and do the same as the 1st way.



The image shows a 'Subscription form' dialog box. It contains the following fields: 'Category' (a dropdown menu with 'Fashion 2010' selected), 'Name' (a text input field), 'Title' (a text input field), 'Description' (a large text area), and 'Redactor' (a dropdown menu with user icons and a trash icon). At the bottom are 'Save' and 'Cancel' buttons.

In addition, an administrator can create newsletters for each subscription, click [here](#) to see how to create a newsletter for a subscription.

After creating newsletters for a subscription, the administrator can manage these newsletters by opening, editing, deleting or converting as a template for using later.

Shoes Fashion shoes		Moderation	
Letter	Date	Status	<input type="checkbox"/>
Discount	Sat Sep 12 09:53:50 ICT 2009	draft	<input type="checkbox"/>
Advertising	Tue Sep 15 10:20:29 ICT 2009	awaiting	<input type="checkbox"/>
Sale off	Thu Sep 10 10:24:39 ICT 2009	sent	<input type="checkbox"/>

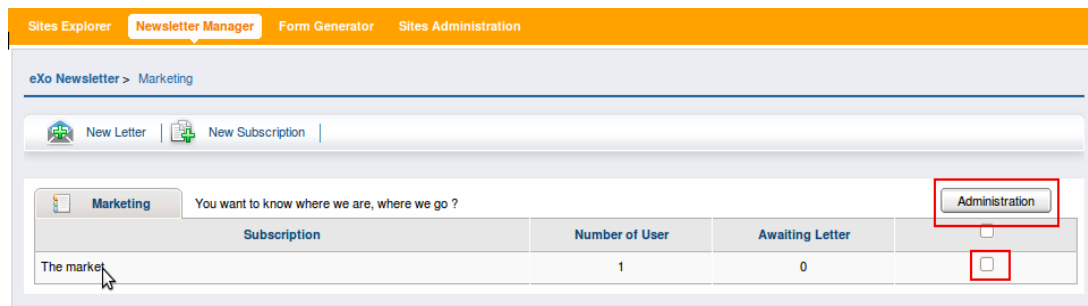
Details:

Shoes	The name of the subscription.
Fashion shoes	The brief description about the subscription.
Letter	The list of all letters of this subscription.
Date	The date and time when creating this letter.
Status	There are 3 types of status: draft, awaiting and sent.
Moderation	This button allows you to take actions on a newsletter that you select

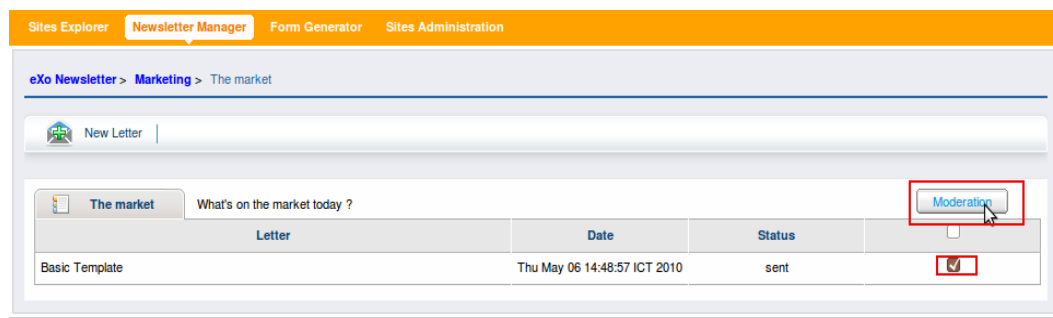
3.6.2.3 Open a Newsletter

Administration can easily view the content of a newsletter. Do the following steps:

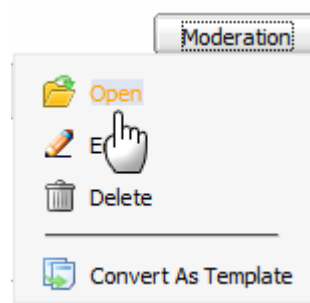
Step 1: Choose a specific subscription in a category by left-clicking it or checking in the checkbox, then select **Administration | Open** item:



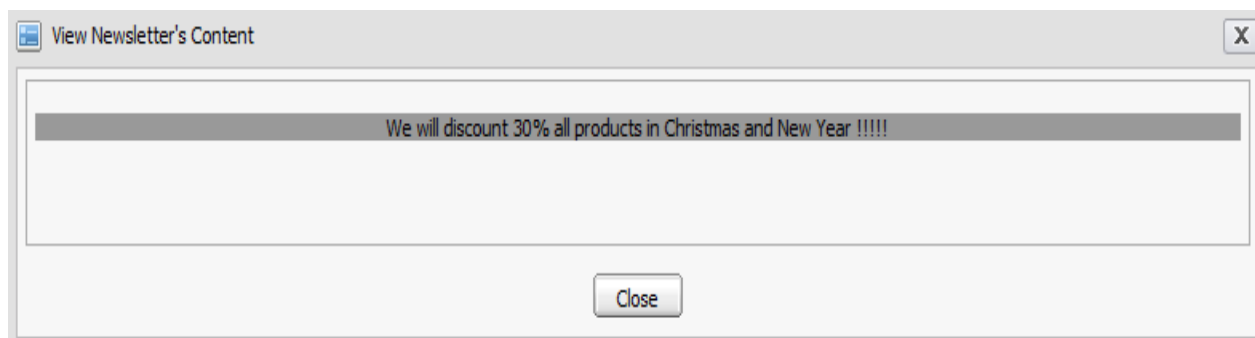
Step 2: Select the newsletter that you want to open by left-clicking it, or selecting the checkbox.



Step 3: Click the **Moderation** , then select **Open** in the menu.



The **Content of View Newsletter** form will be displayed:



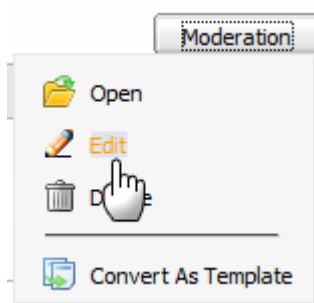
Step 4: Click **Close** to close this form.

3.6.2.4 Edit a Newsletter

Do the following to edit a newsletter:

Step 1: In a specific subscription, select the newsletter that you want to edit by selecting the checkbox.

Step 2: Click  , then select **Edit** in the menu.



The **Newsletter entry form** will appear:

The screenshot shows a web application window titled "Newsletter entry form". It contains several input fields and a button. The fields are: "Template" (dropdown menu showing "Basic Template"), "Send date" (text input showing "03/06/2010 16:43:18"), "Category" (dropdown menu showing "New Trend"), and "Subscription" (dropdown menu showing "Euro exported shoes"). Below these fields is a button labeled "Update sending parameters".

Below the first section, there are three tabs: "Main Content" (selected), "Illustration", and "Advanced". Under the "Main Content" tab, there are two text input fields: "Name" (containing "discount") and "Title" (containing "Discount"). Below these fields is a rich text editor. The editor has a toolbar with various icons for text formatting (bold, italic, underline, etc.), alignment, and insertion. The text area of the editor contains the text: "We will discount 30% all products in Christmas and New Year !!!!!".

Step 3: Change the values in the fields that you want to edit: **Template**, **Send date**, **Category**, **Subscription**.

Step 4: Click the **Update a Newsletter's info** button.

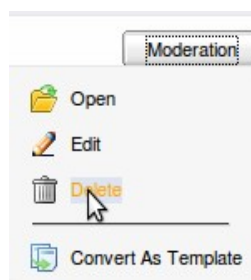
Step 5: Change the values in the fields: **Title** and **Main content**.


Step 6: Click **Save** to save as draft, or click **Send**.

3.6.2.5 Delete a newsletter

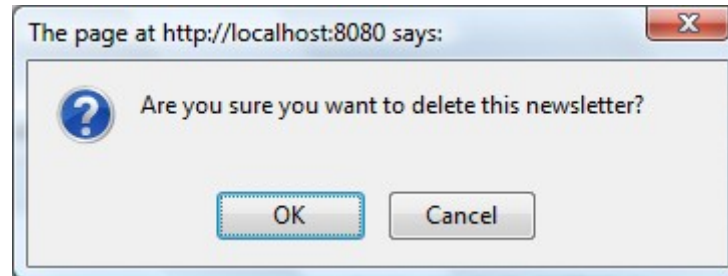
Administrator can delete obsolete newsletters by following:

Step 1: In a specific subscription, select the newsletter that you want to delete by selecting the checkbox.



Step 2: Click , then click **Delete** in the menu.

The confirmation message will be displayed:

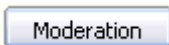


Step 3: Click **OK** to accept deleting this newsletter, or **Cancel** to quit without deleting.

3.6.2.6 Convert as Template

Administrator can reuse the template of the frequently used newsletter template by:

Step 1: Select the newsletter that you want to make it as a template.

Step 2: Click , then select **Convert as Template** in the menu. The next time when you create a newsletter, this template will be listed in the **Template** field in the **Newsletter entry form**.

3.6.2.7 Newsletters

Each subscription consists of many newsletters. **WCM** helps you easily create newsletters by following these steps:

Step 1: Go to **Groups | Newsletter Manager** on the Administration bar. The eXo Newsletter appears.


Step 2: Click  on the action bar. The **Newsletter entry form** will appear:

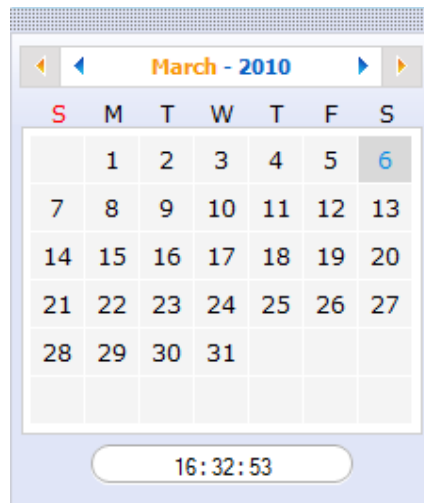
Illustration 129: The Newsletter entry form

Details:

Template	The template that you select for your newsletter form.
Send date	The date and time when you want to send this newsletter.
Category	The category contains this newsletter.
Subscription	The subscription contains this newsletter.
Update sending parameters	This button allows you to update information about this newsletter.

Step 3: Click  to select the template for a newsletter.

Step 4: Click the **Send Date** field. The calendar will appear to allow you to choose the date and time when you want to send this newsletter.



Step 5: Click  in the category field to select the category and the subscription in list.

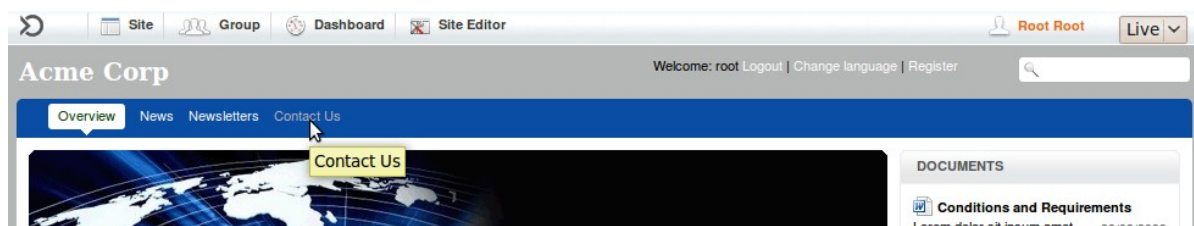
Step 6: Click the **Update sending parameters** button to update information about this newsletter. A message pops up and informs that you have updated information successfully.

Step 7: Input a title of a newsletter in the **Title** field.

Step 8: Create a content for a newsletter by inputting information in the **Main content** textbox

Step 9: Click **Save** to save this newsletter as draft, or click **Send** to send this newsletter.

Step 10: Select **Contact Us** on the navigation bar, or go to **Site | Acme | Contact Us**.



The **Contact Us** page will appear:

LEAVE YOUR MESSAGE

Select a recipient: Infos

Your Name

Your Address

Your Email Address

Your Phone Number

Your Message

Save

Done

Details:

Select a recipient	the recipient who will receive a message
Your name	the name of a person who leaves a message
Your Address	the address of a person who leaves a message
Your Email Address	the email address of a person who leaves a message
Your Phone Number	the phone number of a person who leaves a message
Your message	write a message that you want to leave

Step 11: Select a recipient and enter values in this form.

Step 12: Click **Save** to save a message.

3.7 Fast Content Creator

WCM provides users with the Fast Content Creator portlet that allows users to create document content quickly. The Fast Content Creator portlet is applied in the **Contact Us** on the navigation bar:

Step 1: Go to **Contact Us** on the navigation bar or go to **Site | Acme | Contact Us**.

The **Contact Us** page will appear:

Acme Corp

Welcome: root Logout | Change language | Register

Overview News Events Newsletters **Contact Us**

LEAVE YOUR MESSAGE

Select a recipient Infos

Your Name

Your Address

Your Email Address

Your Phone Number

Your Message

Save

Illustration 130: The Contact Us page

Details:

Select a recipient	To choose people who will receive the message.
Your Name	To type the name of person who leaves a message.
Your Address	To type the address of person who leaves a message.
Your Email Address	To enter the email address of person who leaves a message.
Your Phone Number	To enter the phone number of person who leaves a message.
Your Message	To write a message that you want to leave.

Step 2: Select a recipient and enter values in this form.

Step 3: Click **Save** to save a message.

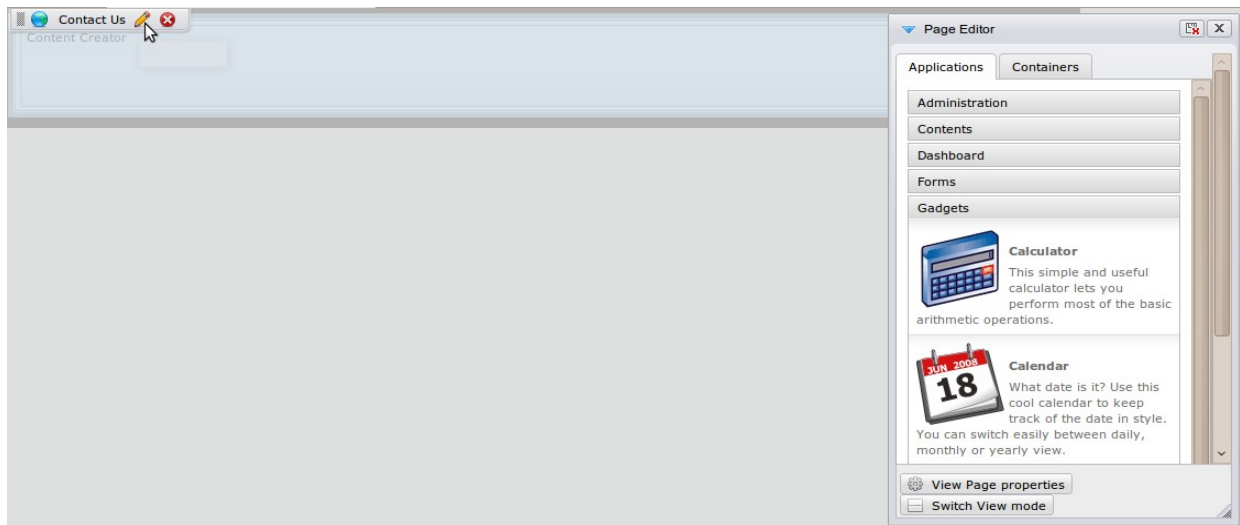
3.7.1 Edit Mode

Users can edit templates, take actions and save locations for the documents in the Contact Us portlet.

Step 1: Go to **Contact Us** on the navigation bar or go to **Site | Acme | Contact Us**.


Step 2: Click **Site Editor | Edit Page** on the administration bar. The **Page Editor** will be displayed.


Step 3: Click the edit icon to open the **Edit Mode** tab in the **Contact Us** portlet.



The **Edit Mode** tab is displayed like the following illustration:

[Edit Mode](#) | [Portlet Setting](#) | [Select Icon](#) | [Decoration Themes](#) | [Access Permission](#)

Save location
 Location to save: 

Template options
 Select template: 
 Custom save button:
 Custom save message:

Your comment has been received.
We appreciate your feedback.


 Redirect: ☒
 Redirect path:

Actions

Name	Description	Instance of	Action
No action			

Details:

Location to save	To select the location for saving documents or messages.
Select Template	To choose available templates for documents. There are corresponding fields to each template.
Custom save button	To change the label for the save button.
Custom save message	To show the message that informs you have just saved a document.
Redirect	To allow users to redirect the path in the Redirect path field.
Redirect path	To show a path that a user will be directed to after he/she clicks OK in the confirmation message.
Actions	To add another actions to documents.

Step 4: Click the icon  to search for the location for saving documents. The **Select location** form will appear:

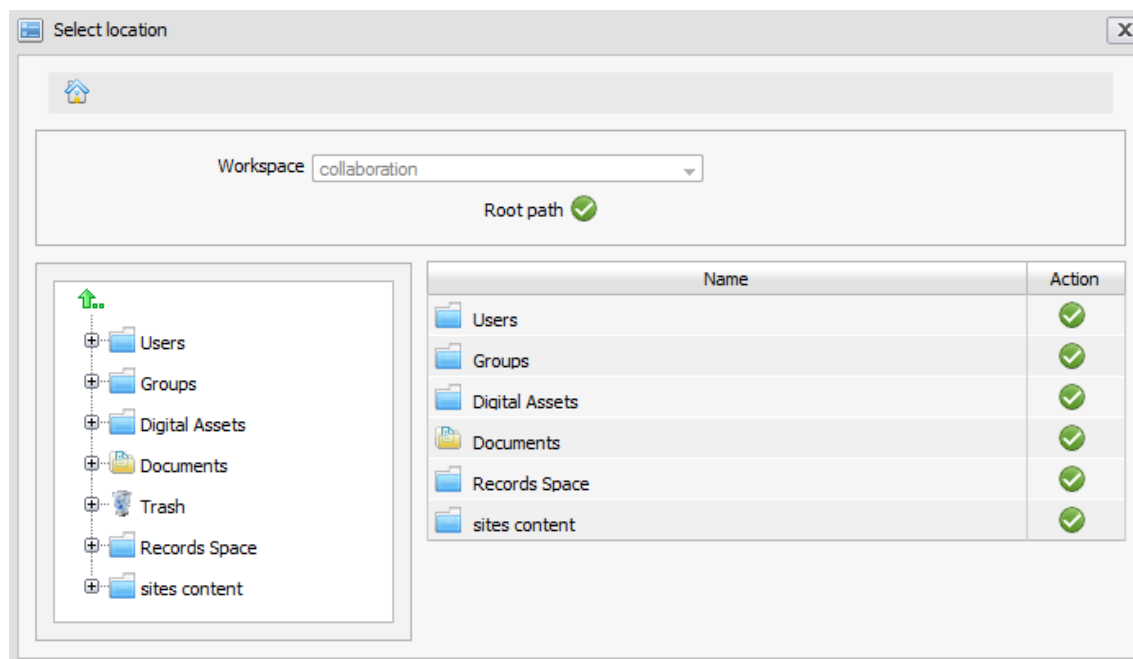




Illustration 131: The Select location form

Step 5: Select the parent node on the left panel and click the icon  in the **Action** column to choose the child node on the right panel. After being selected, this location will be displayed on the **Location to save** field. Created documents will be saved in this location.

Step 6: Select a template for documents by clicking .

Step 7: Change the label for **Save**, and the message content after clicking **Save**.

Step 8: Select the **Redirect** checkbox if users want to redirect to the path in the **Redirect path** field after clicking **OK** in the save message.

Step 9: Click **Save** to save all changes of editing properties for documents that users will create in the **Contact Us** Portlet.

3.8 Form Generator

The Form Generator portlet allows users to create and to edit template of document types. Documents are stored in the so-called node; therefore, the term “node” and node types are often applied.

Step 1: Go to **Group | Form Generator** on the **Administration** bar. The **Form Generator** will appear like the illustration below:

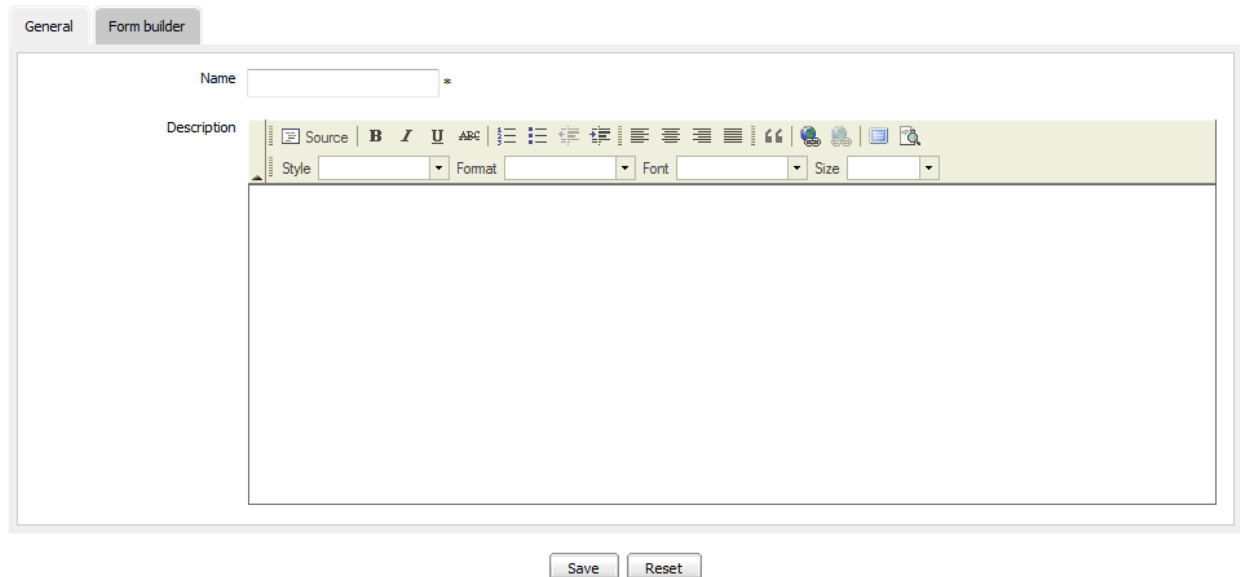
The screenshot shows the 'General' tab of the Form Generator portlet. At the top, there are two tabs: 'General' (selected) and 'Form builder'. Below the tabs, there is a 'Name' field with an asterisk indicating it is required. Underneath is a 'Description' field. To the right of the 'Description' field is a rich text editor toolbar with various icons for text formatting (bold, italic, underline, text color, background color, bulleted list, numbered list, link, unlink, etc.) and a search icon. Below the toolbar are four dropdown menus: 'Style', 'Format', 'Font', and 'Size'. The main area of the portlet is a large empty text box for the form content. At the bottom right, there are 'Save' and 'Reset' buttons.

Illustration 132: The General tab in the Form Generator Portlet

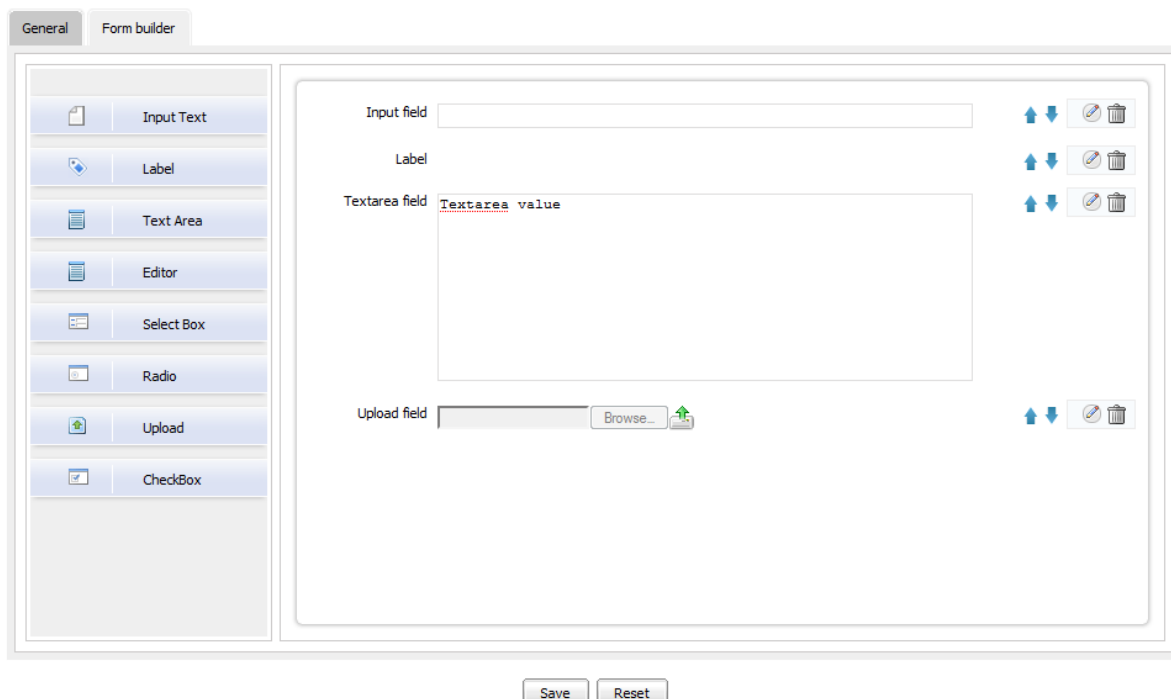
Step 2: Input the node name in the **Name** field. (*Required).

Step 3: Input the brief description about the node.





Illustration 133: The Form builder tab


Step 4: Click the **Form builder** tab that allows users to set properties for a node. Available components are displayed on the left panel.

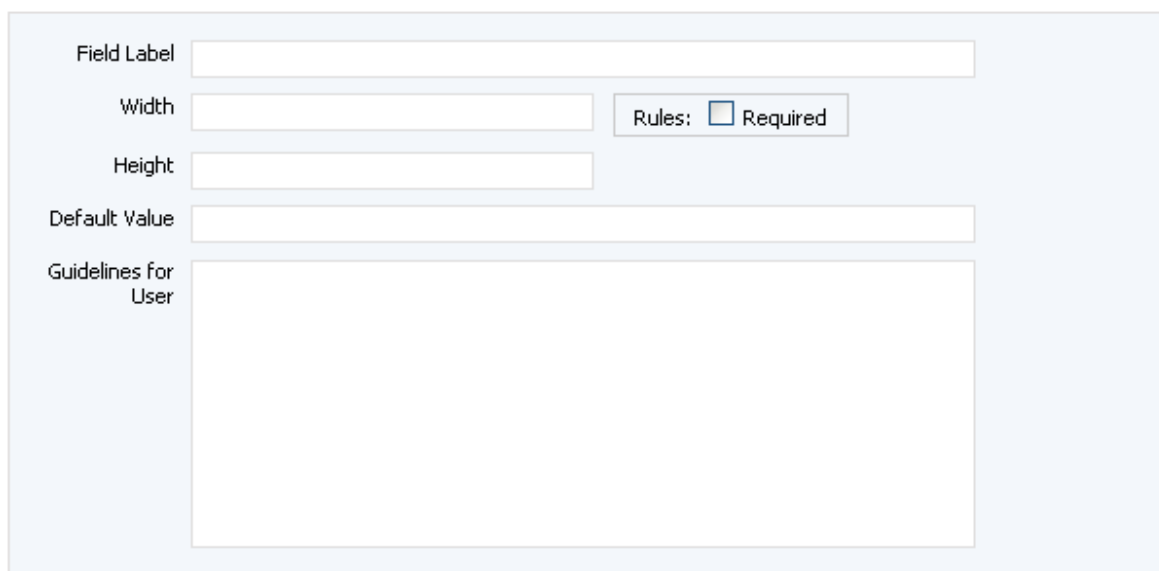


Step 5: Click the desired components on the left panel. The selected components will be displayed on the right panel.

Step 6: Click the icon  corresponding to the component to move this component up or

the icon  to move the component down.

Step 7: Click the icon  that corresponds to the component to edit properties of that component. The form to edit properties appears like the illustration below:




The form contains the following fields and controls:

- Field Label:
- Width: Rules: ☐ Required
- Height:
- Default Value:
- Guidelines for User:

Details:

Field Label	To enter the field label.
Width	To enter the field width. If the checkbox in Rules: <input type="checkbox"/> Required is marked, the star * will appear beside the text box, indicating that it is required to input values for the text box.
Height	To enter the field height.
Default Value	To display the default value.
Guidelines for User	To give instructions about this component.

To delete this component click the trash icon  that corresponds to the component.

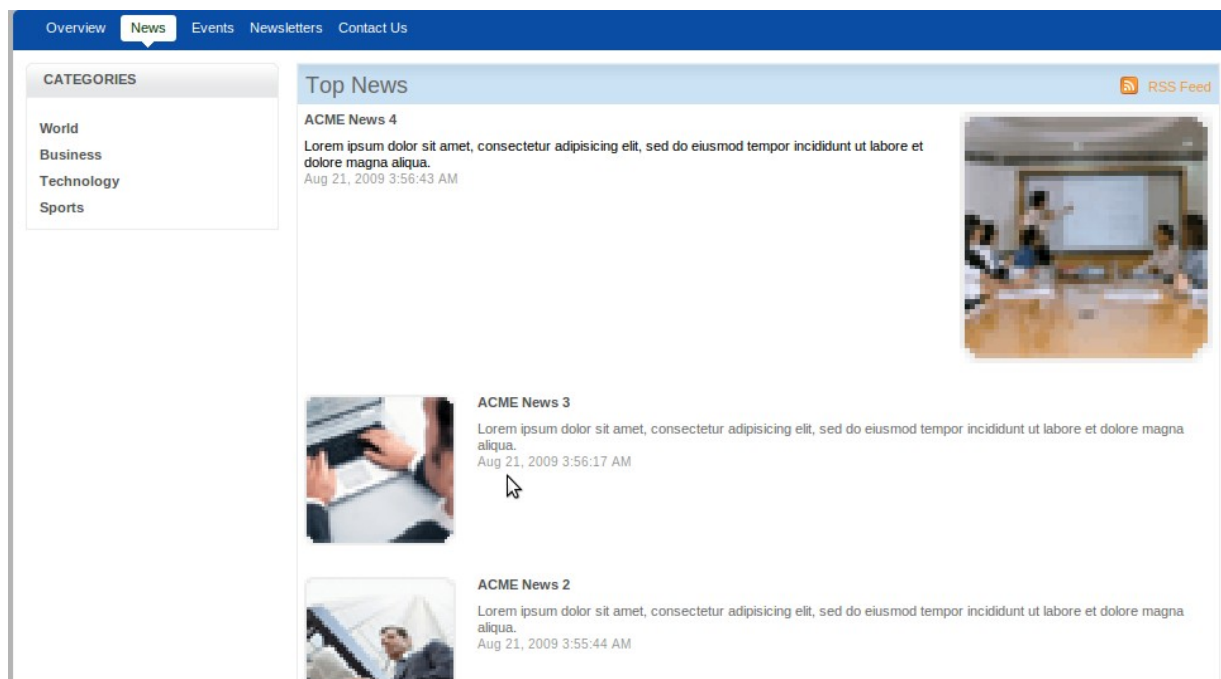
Step 7: Click **Save Form** to save the form that you have created for nodes.

Step 8: Click **Save** to accept creating a new node, or **Reset** to edit this node again before saving.

3.9 Categories

When implementing the Category, users will actually enjoy nice features via the Category model. Thanks to the symbolic link, no matter where the object physically resides, the database can retrieve it. In addition, the relations amongst shortcuts can be managed. Now, you can view documents or web content in the Parameterized Content List Viewer in such an easy way.

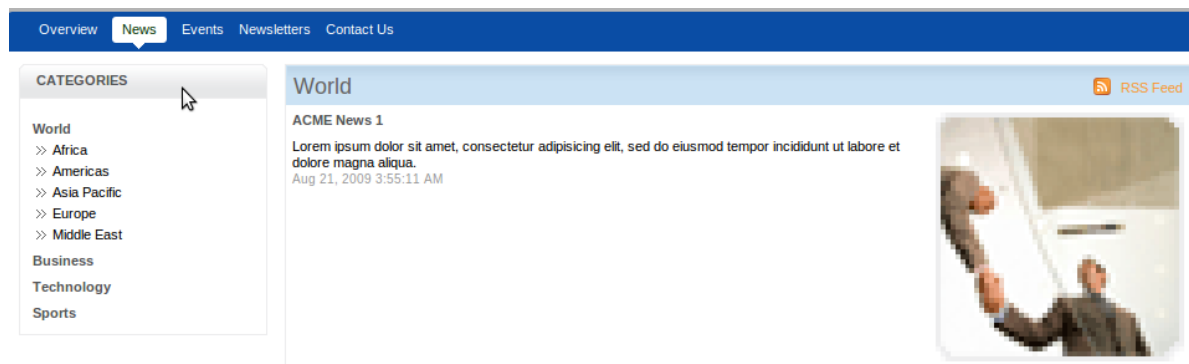
Step 1: Go to **News** on the navigation bar.



The left panel: lists all the sub-categories containing documents or web content.

The right panel: shows the documents or web content that you have selected on the left panel.

Step 2: Select a category that you want to view on the left, it will be shown on the right




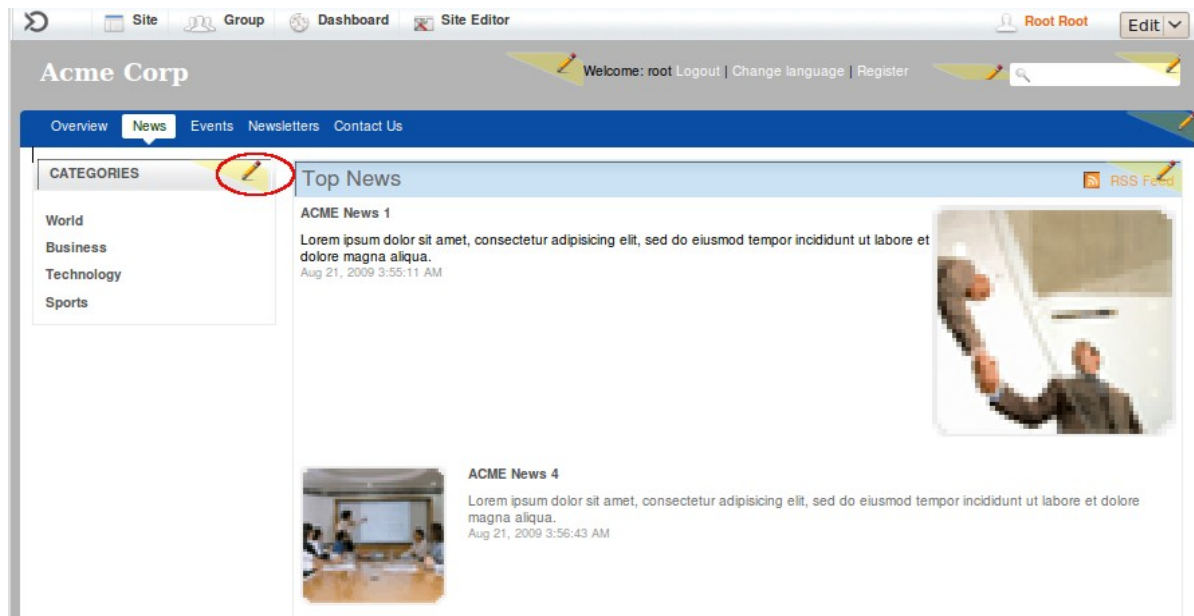
(only documents or web content published are shown).

Step 3: Click the title of document or web content to view the whole.

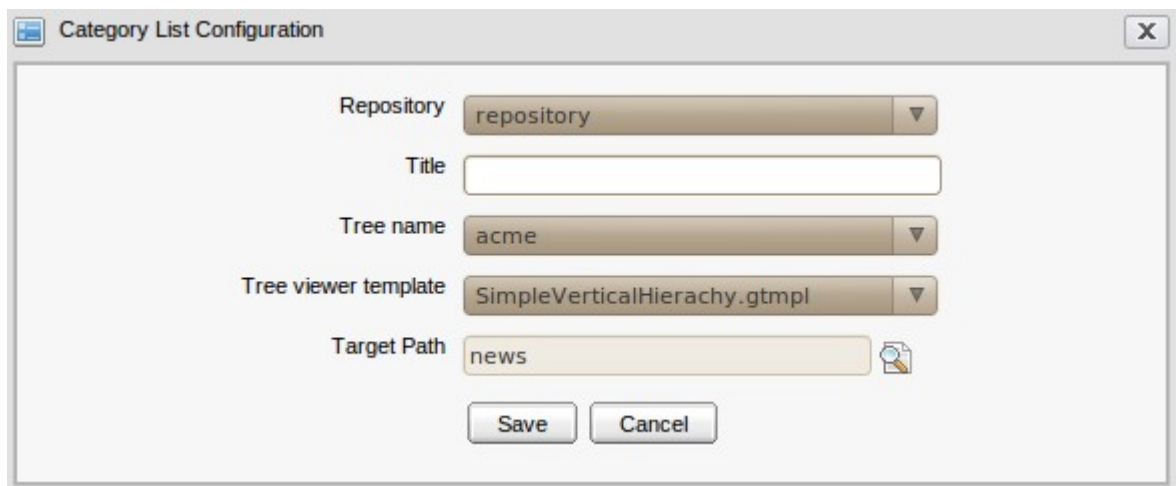
3.9.1 The Edit Mode of Category Navigation portlet

Administrators can edit the Category Navigation portlet by following these steps:

Step 1: Go to **News**, then turn on the **Edit** mode. Click the edit icon  on the **Category** panel.



The Category List Configuration form will appear:

The screenshot shows the 'Category List Configuration' dialog box. It has a title bar with a close button (X). The form contains the following fields: 'Repository' (a dropdown menu showing 'repository'), 'Title' (a text input field), 'Tree name' (a dropdown menu showing 'acme'), 'Tree viewer template' (a dropdown menu showing 'SimpleVerticalHierachy.gtmpl'), and 'Target Path' (a text input field showing 'news' with a magnifying glass icon). At the bottom, there are 'Save' and 'Cancel' buttons.

Or, go to **Group | Administration | Page Management** on the Administration bar. The Manage Pages form appears:

Administration ▾				
Search: <input type="text"/>		Owner type ▾		
Page Id	Title	Access Permission	Edit Permission	Action
group::platform/web-contributors::Site Explorer	Site Explorer	[*/platform/web-contributors]	manager:/platform/web-contributors	
group::platform/web-contributors::WCM Administration	WCM Administration	[manager:/platform/web-contributors]	manager:/platform/web-contributors	
portal:acme::category	Category navigation portlet	[Everyone]	*/platform/administrators	
portal:acme::clv	Content List Viewer Portlet	[Everyone]	*/platform/administrators	
group::platform/administrators::community management	Community Management	[manager:/platform/administrators]	manager:/platform/administrators	
portal:acme::confirmation	Contact Form Confirmation	[Everyone]	editor:/platform/web-contributors	
portal:acme::contactus	Contact Us	[Everyone]	*/platform/web-contributors	
portal:acme::events	Events	[Everyone]	editor:/platform/web-contributors	
group::platform/web-contributors::form generator	Form Generator Portlet	[*/platform/web-contributors]	manager:/platform/web-contributors	
portal:acme::navigation	Page Navigation	[*/platform/web-contributors]	*/platform/administrators	
<div>Add New Page</div>				

Step 2: Click the icon that corresponds to the **Category navigation portlet** for editing this portlet.

The **Edit Mode** will be displayed:

Edit Mode

Portlet Setting

Select Icon

Decoration Themes

Access Permission

Repository

repository

Title

Tree name

acme

Tree viewer template

SimpleVerticalHierarchy.gtmpl

Target Path

news


Save

Cancel

Close

Details:

Repository	The location used for storing documents or web content.
Title	The subject that will be displayed in the View mode.
Tree name	The available types of taxonomy tree.
Tree Viewer Template	The template of the category navigation.
Target Path	The path that will display documents or web content.

Step 4: Click  to select the repository for documents in the **Repository** field.

Step 5: Input the category name in the **Title** field.

Step 6: Select the taxonomy tree for a category.

Step 7: Select the template for displaying categories.

Step 8: Click the icon  to select the target path. The **Page selector** form will appear:

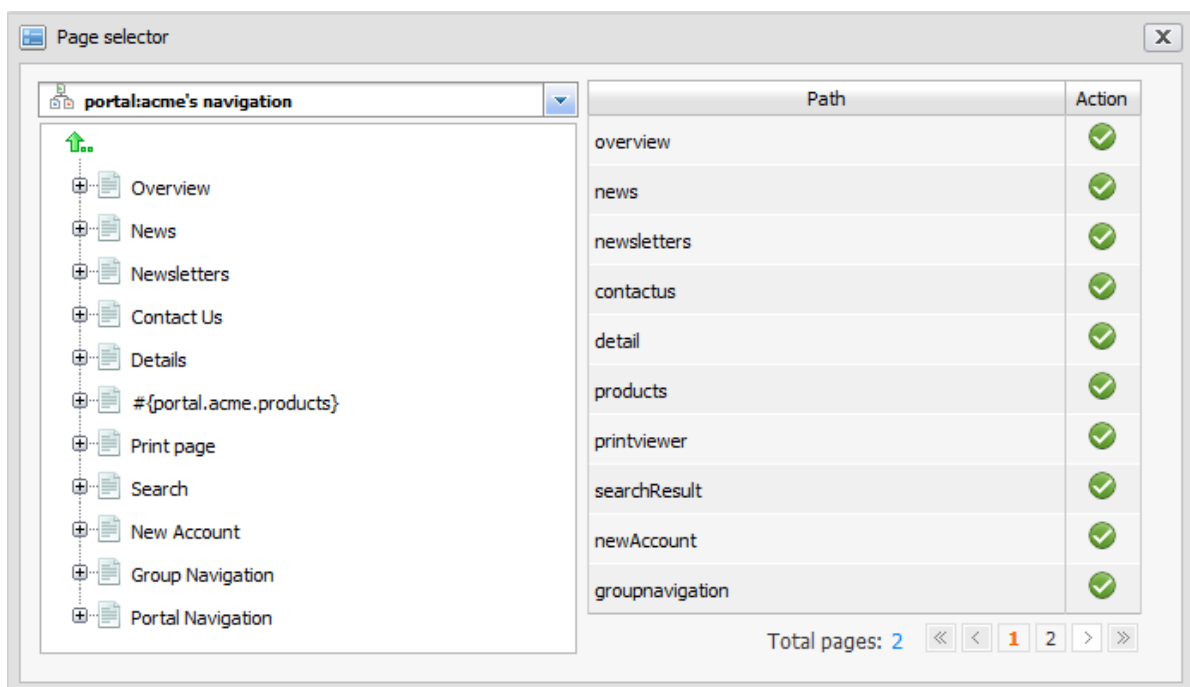




Illustration 134: The Page selector form

Step 9: Click  to select the navigation on the left panel. The corresponding pages will be displayed on the left panel and the corresponding paths will be displayed on the right panel.

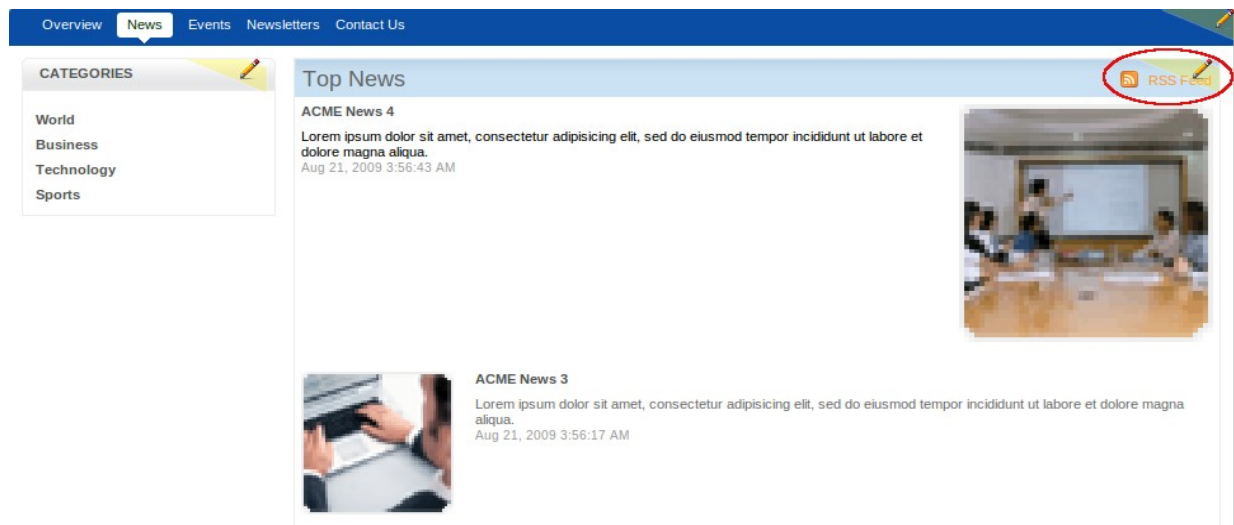
Step 10: Click the icon  to select the path. This path will be displayed in the **Target Path** field.


Step 11: Click **Save** to accept saving the configuration for the **Category Navigation** portlet.

3.9.2 The Edit Mode in Parameterized Content List Viewer

Users are entitled to edit the settings in the Parameterized Content List Viewer portlet.

Step 1: Turn on the Edit mode of a site.



Step 2: Click the edit icon () at the upper right corner of this panel, the edit form of Parameterized Content List Viewer will be displayed:

Parameterized content list viewer configuration

Contents selection

Order by: Title

☐ Descendant ☒ Ascendant

Display setting

Header: Top News ☒ Automatic Detection

Viewer template: BigHotNewsTemplate.gtmpl

Paginator template: UIPaginatorDefault.gtmpl

Taxonomy tree: acme

Items per page: 5 *

☒ Show title ☒ Show illustration ☒ Show summary

☒ Show header ☒ Show date created ☒ Show link

☐ Show refresh button ☐ Show read more ☒ Show RSS link

Link Format

Target page: detail

Save Cancel

Illustration 135: The Edit Mode in the Parameterized Content List Viewer portlet

Details:

Order by	To choose types of order priority for documents or web-content. The "descendant" means documents or web-content are arranged according to the increasing order; meanwhile the "ascendant" means documents or web-content are arranged according to the decreasing order.
Header	To enter the topic containing documents or web-content. You can use the default header to let the portlet define the Header from the category URI.
Viewer template	To choose the template in which documents or web-content will be displayed for viewing.
Paginator template	To choose the template in which documents or web-content will be arranged.
Items per page	To enter a number of documents or web-content that will be displayed per page.
Show title	To allow showing titles of documents or web-content.


Show header	To allow showing headers of documents or web-content.
Show refresh button:	To allow showing the refresh button.
Show illustration	To allow showing images of documents or web-content.
Show date created	To allow showing the date when documents or web-content are created.
Show read more	To allow showing more documents or web-content.
Show summary	To allow showing summaries of documents or web-content.
Show link	To allow showing the title of document or web-content.
Show RSS link	To allow showing the RSS link containing documents or web-content.
Target page	The page that users want to link the content to.

Step 3: Select the type and the order displaying document content or web content by selecting the **Order by** field, and **Descendant** or **Ascendant** checkbox.

Step 4: Click  to select the template for Viewer and Paginator.

Step 5: Input the number of items that will be displayed per page in this portlet.

Step 6: Select/unselect the checkboxes, including **Show title**, **Show header**, **Show Refresh** buttons, etc.

Step 7: Click the magnifying magnifier icon  to select the target page. The **Page selector** form will appear:

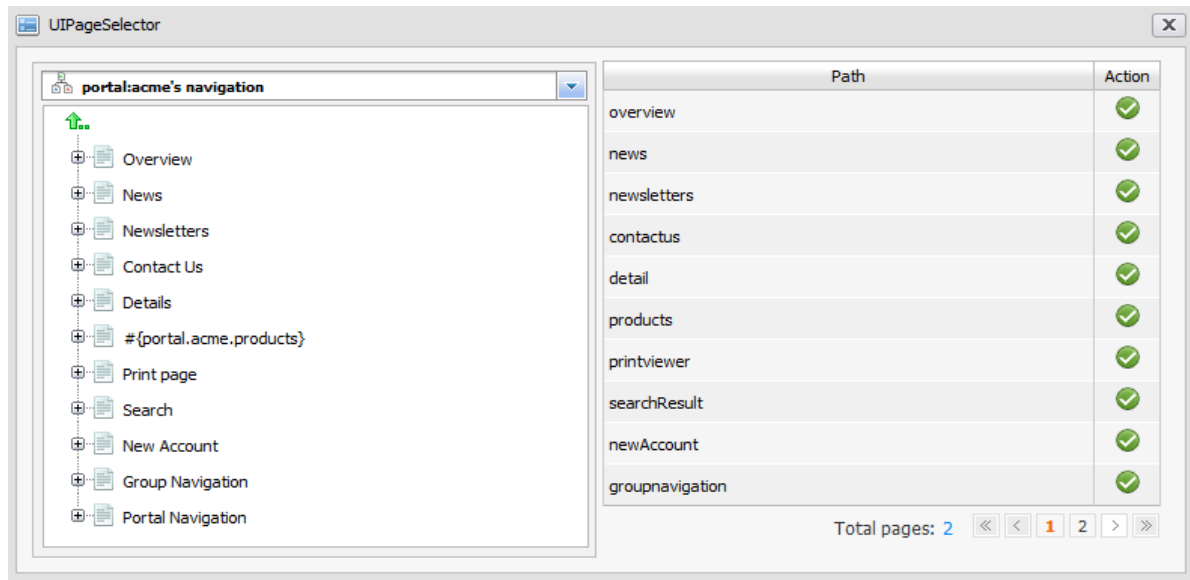




Illustration 136: The Page selector form

Click  to select the navigation, the corresponding pages will be displayed on the left panel and the corresponding path will be displayed on the right panel.

Click  that corresponds to the selected path on the right panel to select the path. The selected path will be displayed in the Target Path field.

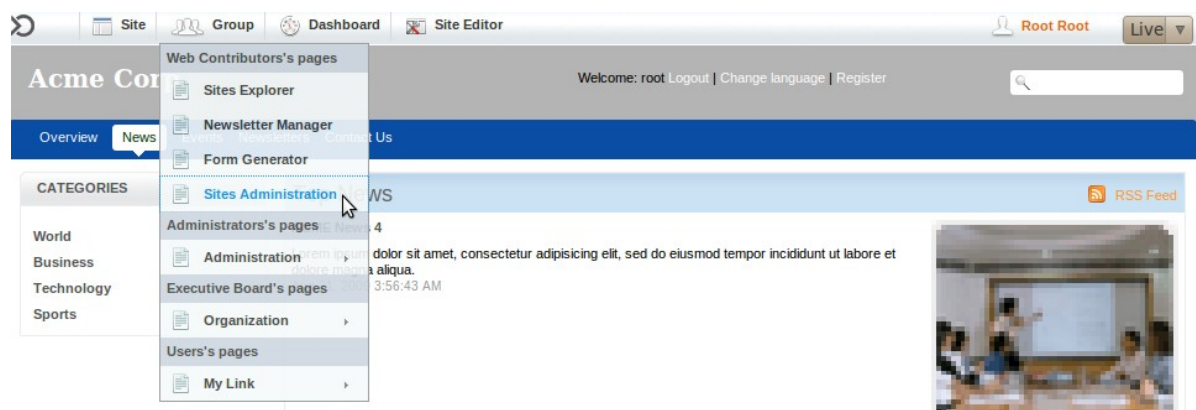
Step 8: Click **Save** to accept changes, or **Cancel** to quit without saving.

4 WCM Administration

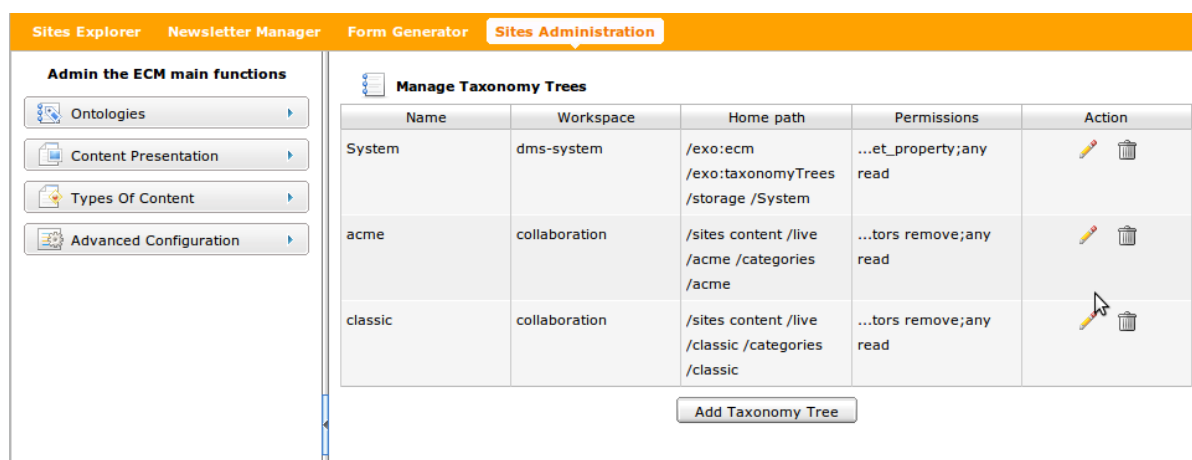
4.1 Access WCM Administration

This page is used to manage all workspaces, drives, node types, metadata, templates, queries, etc. Only administrator like "root" can access the WCM Administration.

Click the **Sites Administration** on the Group bar:



The **Sites Administration** will appear like the following illustration:



This section includes:

- **Ontologies:** includes Manage Folksonomy and Manage Taxonomies.
- **Content Presentation:** includes Manage Template, Manage Metadata, Manage Views, Manage Drive.
- **Types of Content:** includes Namespace Registry, Manage Node Type.
- **Advanced Configuration:** includes Manage Queries, Manage Scripts, Create an Action Type.

4.2 Ontology

4.2.1 Folksonomy Management

The Folksonomy allows you to manage tag styles. The tag style will be changed depending on the number of documents in a tag.

Go to **Sites Administration | Ontologies | Manage Folksonomy**.

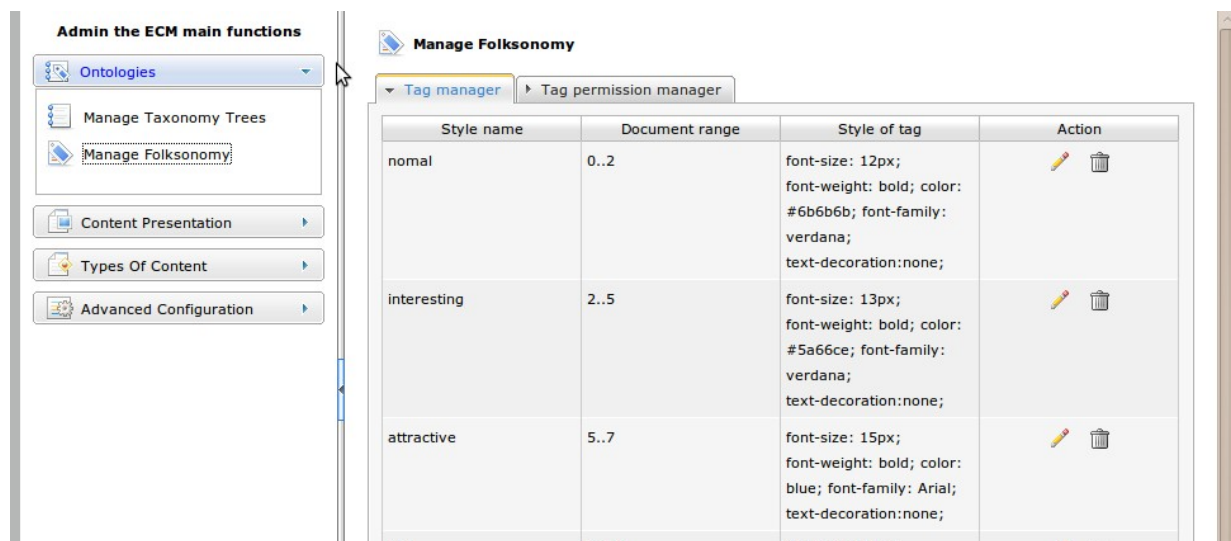


Illustration 137: The Manage Folksonomy form

4.2.1.1 Edit

Tag manager tab:

To edit existing tags, do as follows:

Step 1: Click the icon that corresponds to the tag name which you want to edit in the **Action** column to edit the tag style configuration. The **Edit tag style configuration** form will appear:

Style name

nomal *

Document range

0..2 *

Html style

font-size: 12px; font-weight: bold; color: #6b6b6b; font-family: verdana; text-decoration:none; *

Update

Cancel

Details:

Style name	To give the tag name. (*Required).
Document Range	To give the number of documents assigned to the same tag. (*Required).
Html style	To include font-size, font-weight, color, font-family, text-decoration. (*Required).


Step 2: Change values for fields: **Style name**, **Document range**, **Html style** that you want to edit.

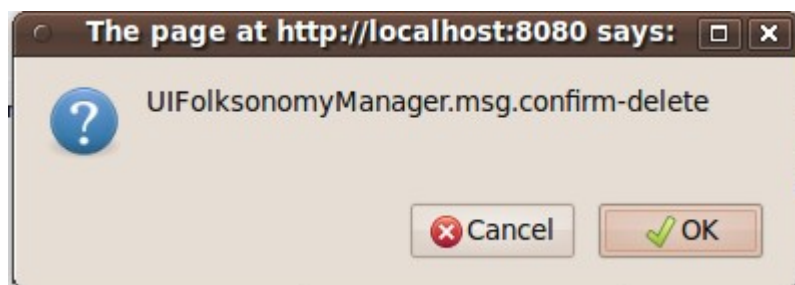
Step 3: Click **Update** to save new changes, or **Cancel** to quit this form without changing.



- You can not edit the style name.
- The format of valid range must be: a..b with 'a', 'b' are positive integers. You can use * instead of 'b' to indicate it is unlimited.
- The 'Html style' text box can not be empty: you can change values of font-size, font-weight, color, font-family, text-decoration.

4.2.1.2 Delete a tag style

An administrator can delete a tag style by clicking the trash icon  that corresponds to the tag style which an administrator wants to delete. There will be a message which confirms the deletion:

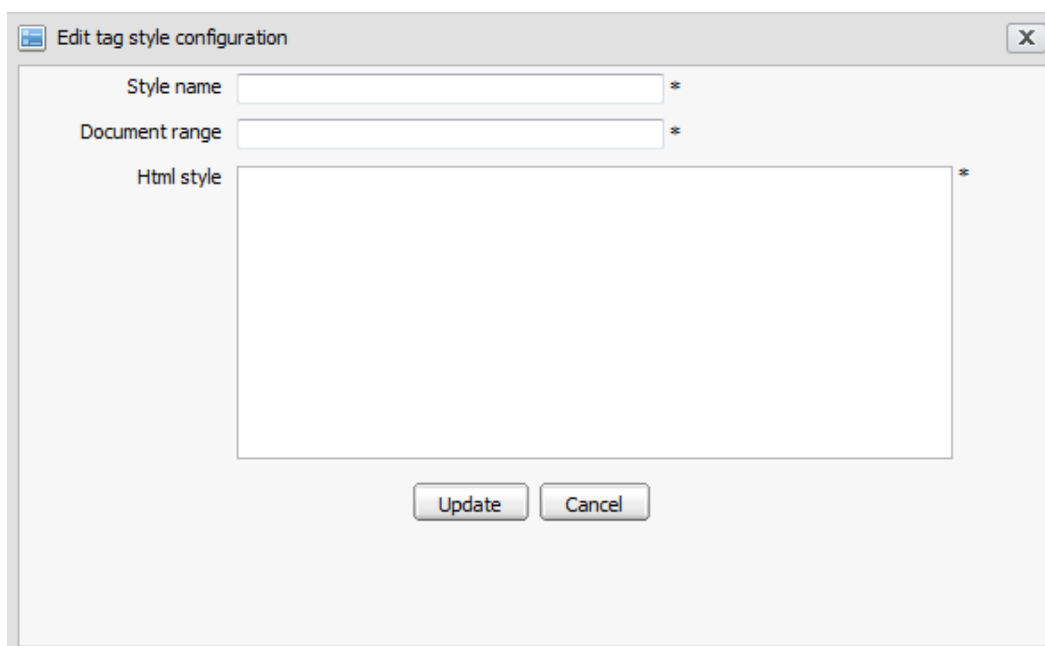


Click **OK** to accept deleting, or **Cancel** to quit without deleting the tag style.

4.2.1.3 Add a tag style

Furthermore, an administrator can add a new tag style as follows:

Step 1: Click the **Add style** button. The **Edit tag style configuration** form will appear:



The dialog box titled "Edit tag style configuration" has a close button (X) in the top right corner. It contains three input fields, each followed by an asterisk (*):

- Style name
- Document range
- Html style

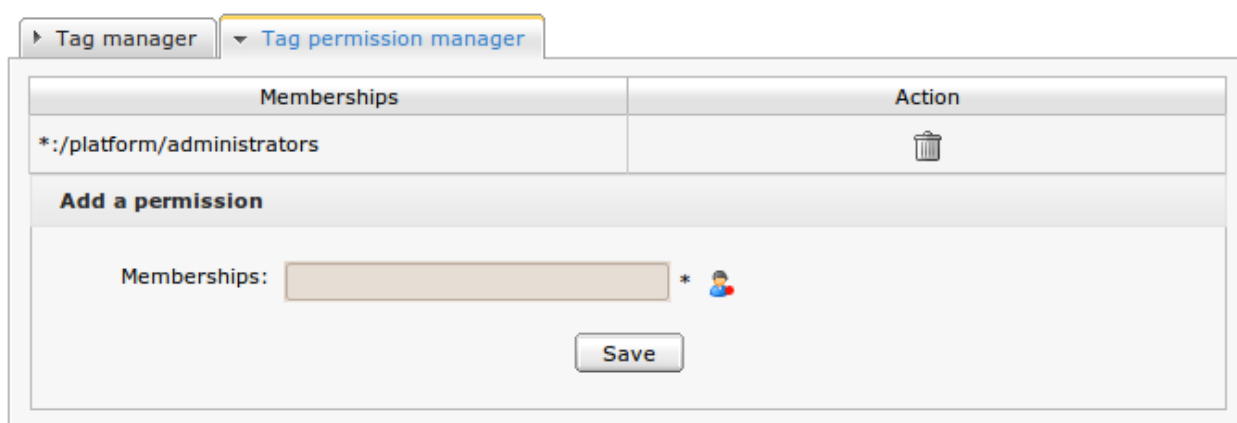
At the bottom of the dialog are two buttons: "Update" and "Cancel".

Illustration 138: The Edit tag style configuration form


Step 2: Input values for fields: **Style name**, **Document range** and **Html style**, all of which are required.

Step 3: Click **Update** to accept adding a new tag style, or **Cancel** to quit without adding a new tag style.


- The **Tag permission manager** tab: helps administrator set permissions regarding to editing and deleting public tags.



The interface shows two tabs: "Tag manager" and "Tag permission manager". Below the tabs is a table:

Memberships	Action
*:/platform/administrators	

Below the table is a section titled "Add a permission". It contains a label "Memberships:" followed by an input field, an asterisk, and a user icon. A "Save" button is located below the input field.

Step 4: Click the icon  to select memberships in order to add a permission for those memberships. The **Select membership** form will appear:

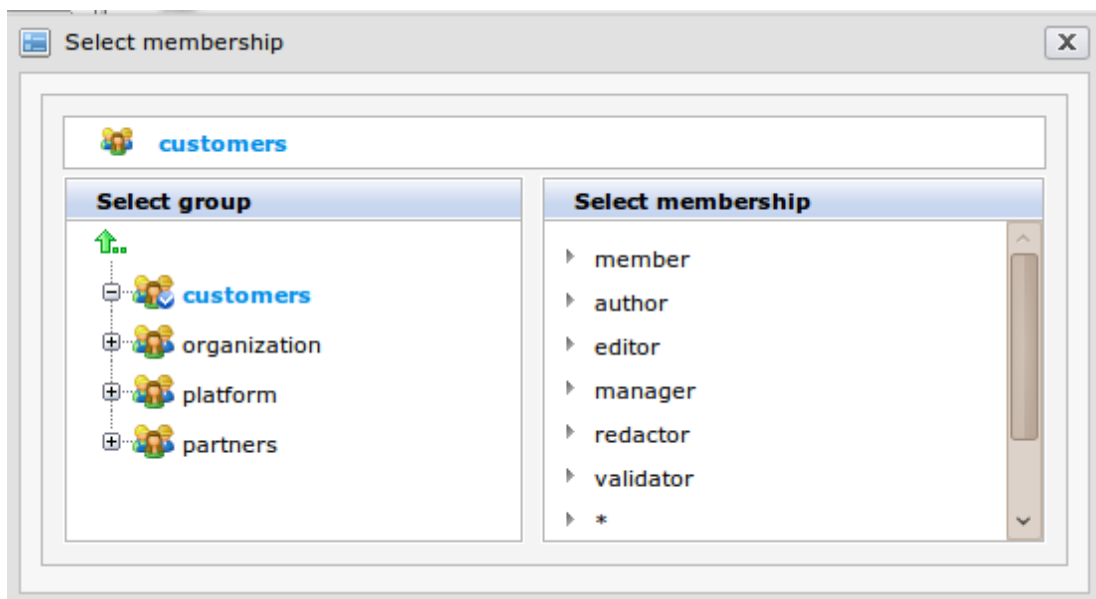
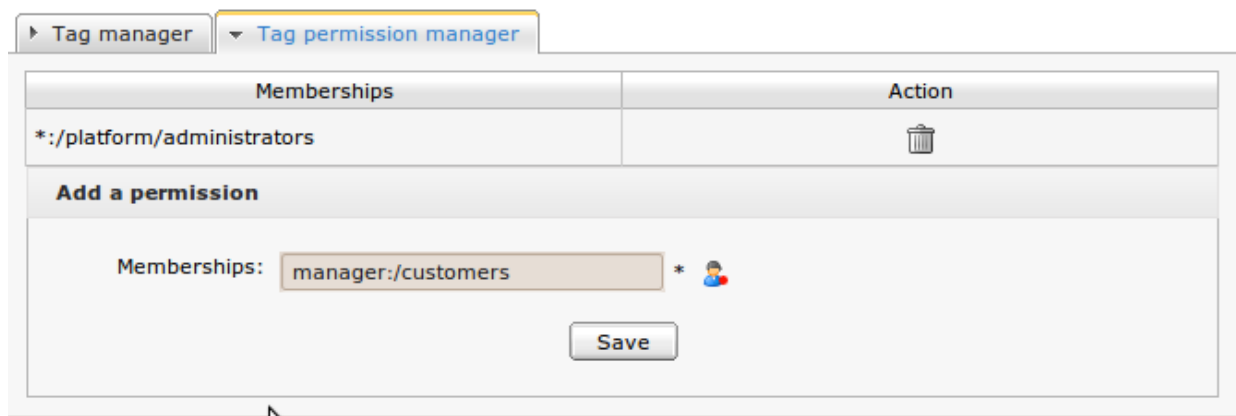
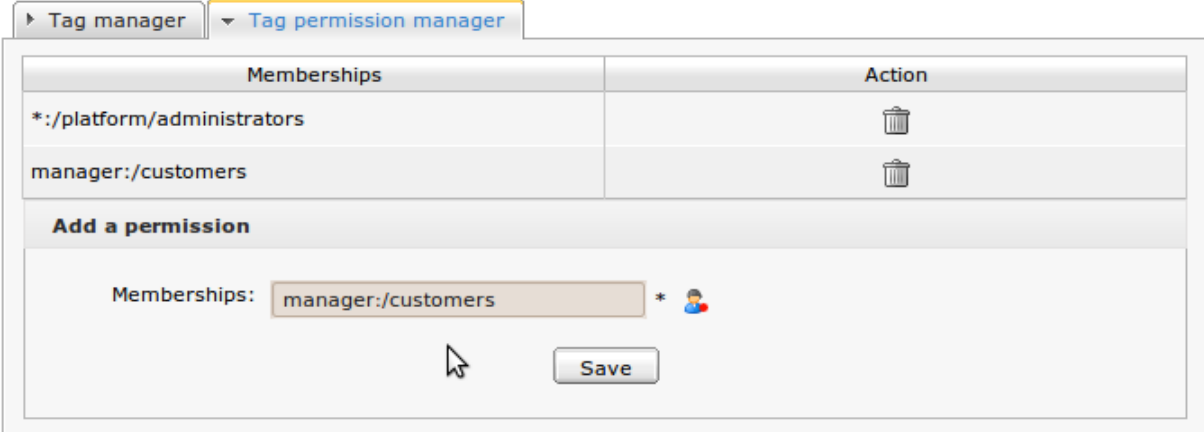




Illustration 139: The Select membership form

Step 5: Select a group on the left and the corresponding membership on the right. The selected membership will appear in the **Memberships** field:




Step 6: Click **Save** to accept adding a permission for the selected membership of the selected group. The selected membership that has just been added a permission will be listed in the **Memberships** column.

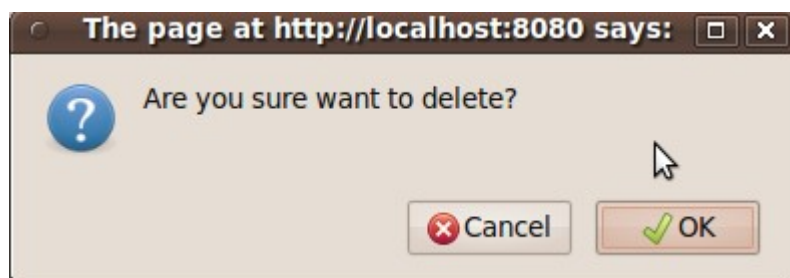


Memberships	Action
*/platform/administrators	
manager:/customers	

Add a permission

Memberships: * 

An administrator can also delete memberships that have been set permissions by clicking the **Delete** icon relevant to that membership. A confirmation message will appear:



Step 7: Click **OK** to accept deleting, or **Cancel** to quit this form without deleting.

4.2.2 Manage Taxonomy Trees

A Taxonomy may be understood as a classification practice and science. It is used to sort documents, aiming at facilitating searches. The Taxonomy management includes adding, editing and deleting a taxonomy tree.

Go to **Sites Administration | Ontologies Manage Taxonomy Trees**.

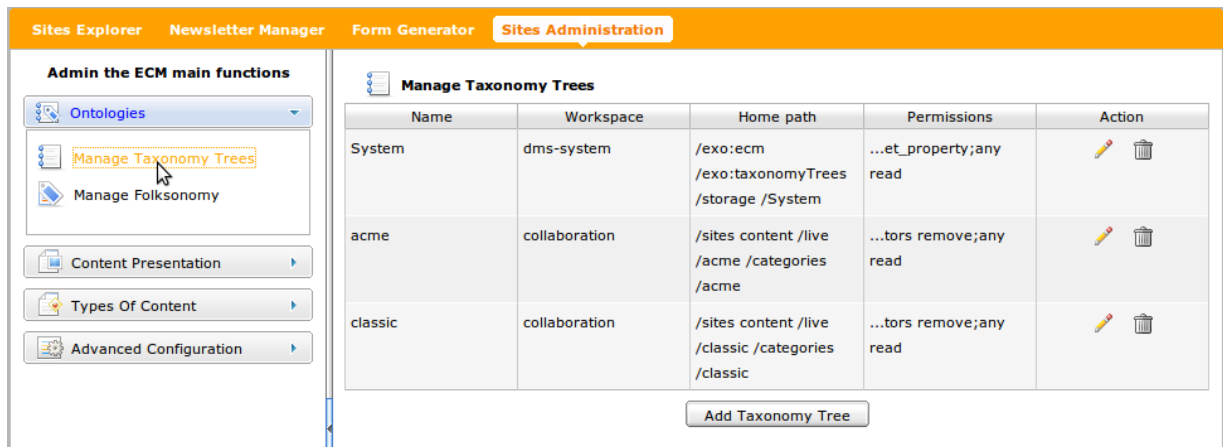


Illustration 140: Manage Taxonomy Trees

4.2.2.1 Add a taxonomy tree

Do the following:

Step 1: Click the **Add Taxonomy Tree** button to add a new taxonomy. The **Add taxonomy tree** form will appear:

The screenshot shows the 'Add taxonomy tree' form. The form has a title bar 'Add taxonomy tree' and a close button. The main content area contains the text 'Input taxonomy name, choose workspace and taxonomy home path'. Below this text are three input fields: 'Name' (with a red asterisk indicating it is required), 'Workspace' (a dropdown menu showing 'dms-system'), and 'Home path' (with a green plus icon next to it). At the bottom of the form are three buttons: 'Reset', 'Next' (highlighted with a mouse cursor), and 'Cancel'.

Illustration 141: The Add taxonomy tree form

Step 2: Enter the taxonomy tree name in the **Name** field. (*Required).

Step 3: Select the workspace that you want to work with.

Step 4: Select the home path by clicking the icon . The **Select home path** form will appear:

Name	Action
exo:ecm	

Illustration 142: The Select home path form

Click if you want to select the root path or click to go to the up level path. Click to expand the folder.




Click corresponding to the path that you want to select as a home path.

Click **Reset** if you want to reset values that have just been selected or **Next** to select permissions for a taxonomy tree.

Select permission for taxonomy tree node

User or Group	Read	Add Node	Set Property	Remove	Action
Empty data					

Add a permission to that node




User or Group *   

Read ☐

Add Node ☐

Set Property ☐

Remove ☐

Step 7: Click the  icon to select a user or the  icon to select memberships or the  icon to select everyone in order to set permissions. The user or membership that you have just selected will be displayed in the **User or Group** field.

Then, check at least one of these below options to set rights for the selected user or membership:

Read Right: The option is to select the read right or not.

Add Node Right: The option is to select the Add Node right or not.

Set Property Right: The option is to select the Set Property Right or not.

Remove Right: The option is to select the Remove right or not.

Step 8: Click **Save** to save all values, or **Reset** to change values that have just been set. After clicking **Save**, click **Next** to go to the next step.

Step 9: Enter the name for an action of the taxonomy tree in the **Name** field. (*Required).

Step 10: Select values for **Lifecycle**, **NodeTypes**, **Target workspace**, **Target path**, **Affected Node Types**. (*Required).

Step 11: Click **Save** to save all values and, click **Next** to go to the next step.



*Do not input some special characters in the 'Name' field like: !, @, #, \$, %, &, *, (,).*

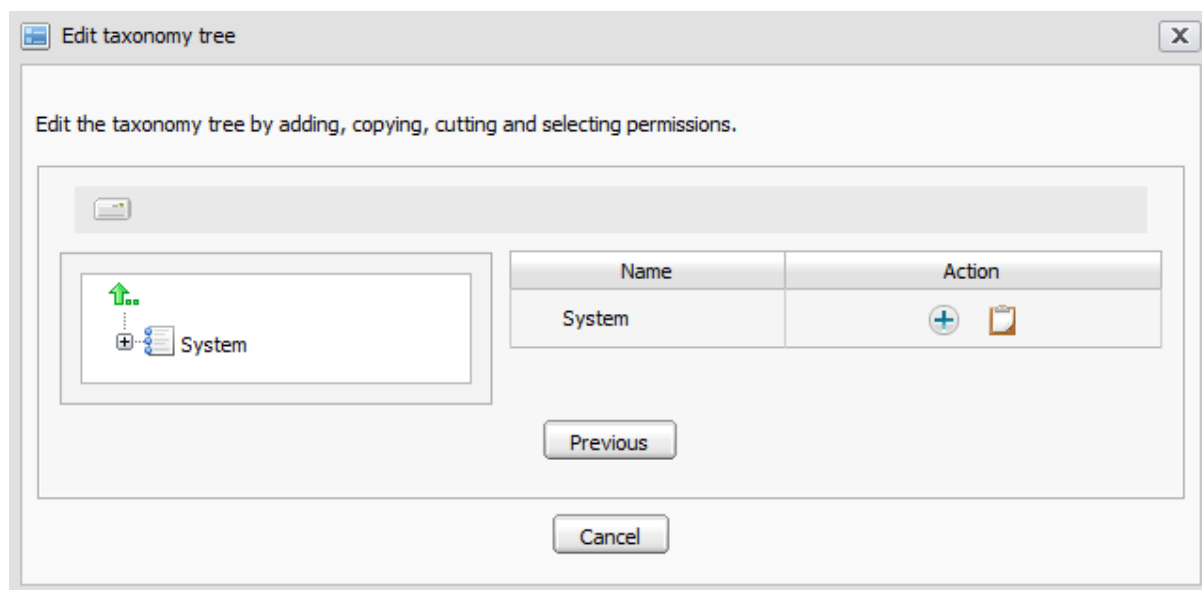
Do not add a taxonomy which has the same name and level with existing taxonomies in a node.

The taxonomy name must contain less than 30 characters.

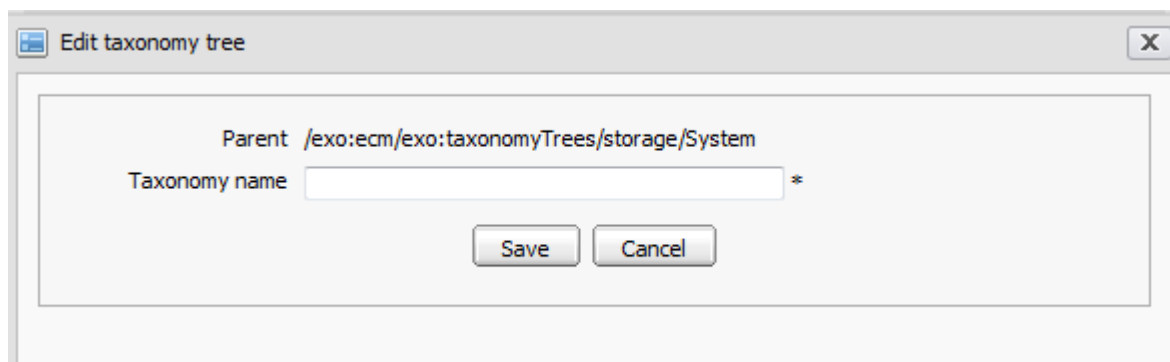
4.2.2.2 Edit a Taxonomy Tree

Do the following:

Step 1: Click the edit icon () that corresponds to the taxonomy tree which you want to edit.



Step 2: Click the  icon to add more taxonomy trees. The Edit taxonomy tree will appear:




Step 3: Enter a taxonomy name in the Taxonomy name field. (*Required).

Step 4: Click **Save** to save the taxonomy name.

Step 5: Click **Previous** to return to the previous steps.

Step 6: Click **Save** to save all changes and the **Previous** or **Next** if you want to edit more.



You can delete a taxonomy by clicking the trash icon  corresponding to the taxonomy that you want to delete. Click **OK** on the confirmation message to accept deleting this taxonomy, or click **Cancel** to discard this action.

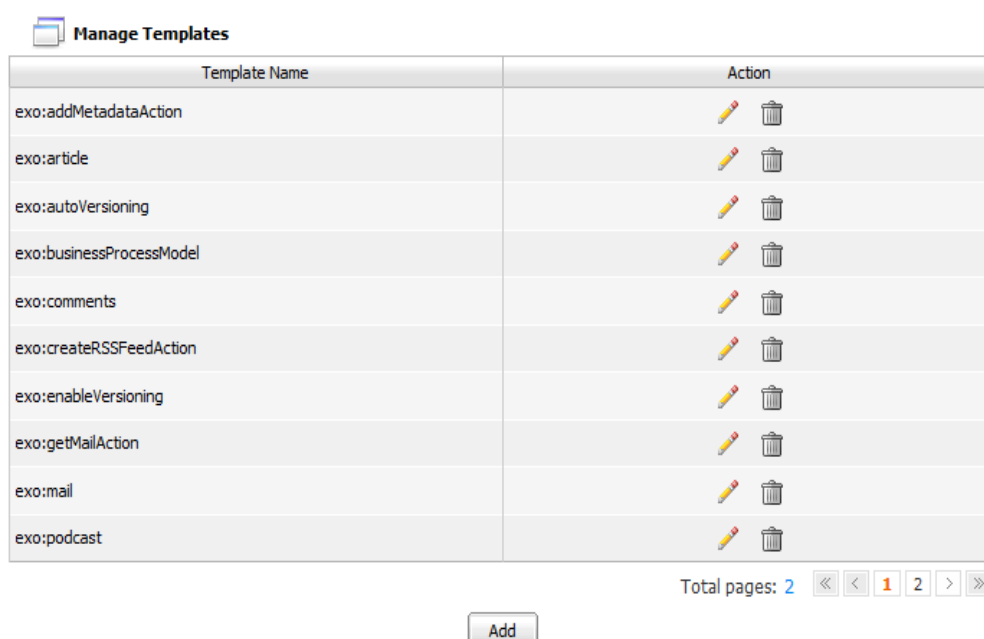
You can not delete taxonomies that have been referenced.

4.3 Content Presentation Management


















4.3.1 Manage A Template

To create a node in **WCM**, this node must set its properties. Thus, each node needs to have a form for entering data for their properties (called the dialog template), and displaying the existing values (called the view template). The template management allows users to view, delete and modify the predefined templates or to add a new template.

Go to the **Sites Administration | Content Presentation | Manage Template**.



The screenshot shows the 'Manage Templates' interface. It features a table with two columns: 'Template Name' and 'Action'. The table lists ten templates, each with edit and delete icons. Below the table is a pagination bar showing 'Total pages: 2' and navigation buttons. An 'Add' button is located below the pagination bar.

Template Name	Action
exo:addMetadataAction	 
exo:article	 
exo:autoVersioning	 
exo:businessProcessModel	 
exo:comments	 
exo:createRSSFeedAction	 
exo:enableVersioning	 
exo:getMailAction	 
exo:mail	 
exo:podcast	 




Total pages: 2   1 2  

Illustration 143: The Manage Templates form

4.3.1.1 Add a new template

The function is used to add a new template. Do the following:

Step 1: Click the **Add** button in the **Manage Templates** form to open the **Template Form**:

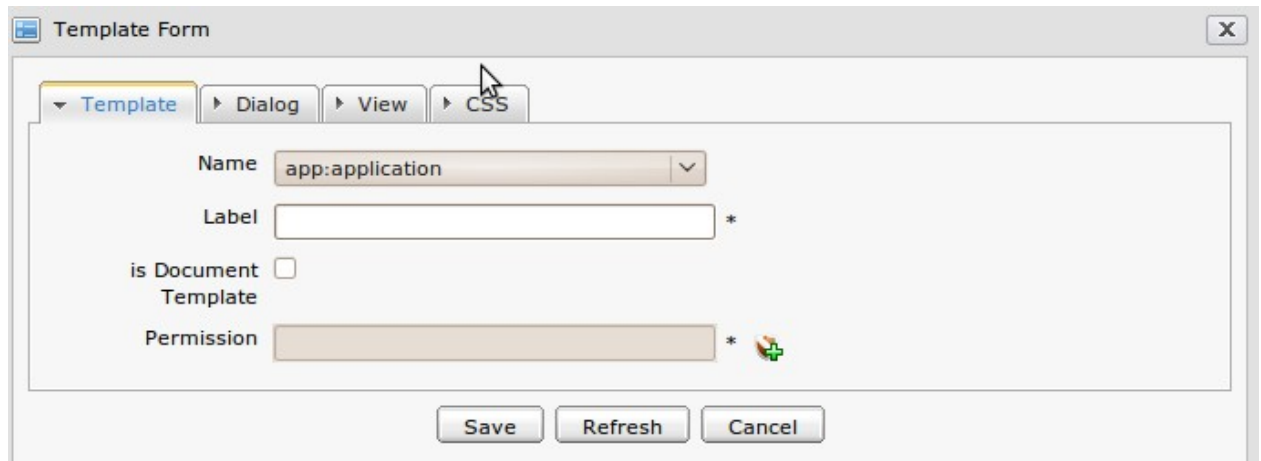
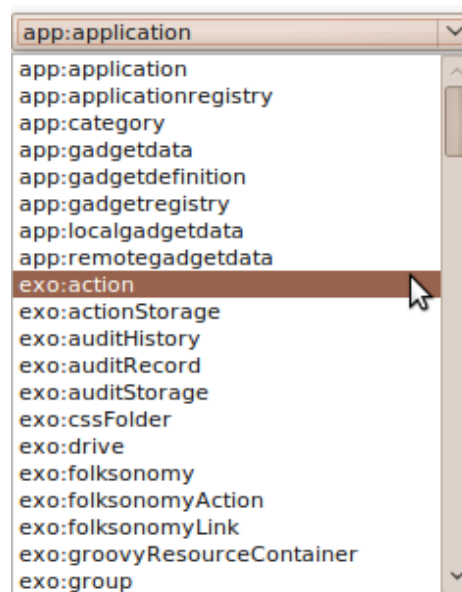


Illustration 144: The New Template form


(*): Required.

Step 2: Select the template type that you want to add by clicking  in the **Name** field:



Step 3: Add a label for this template in the **Label** field.

Step 4: Check /uncheck 'is Document Template' if this template is for document or not.

Step 5: Show the **Select Permission** form by clicking the icon  next to the 'Permission' field:

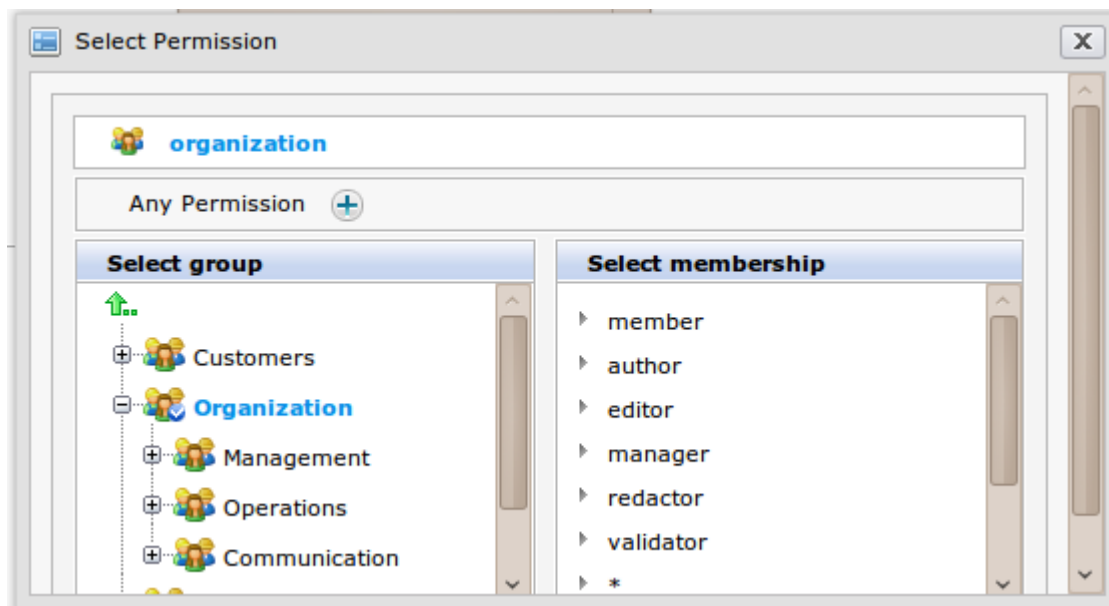


Illustration 145: The Select Permission form

Step 6: Select a group on the left panel and a specific membership that you want to share this template.

Step 7: Select the **Dialog** tab and enter value in **Dialog content** field..

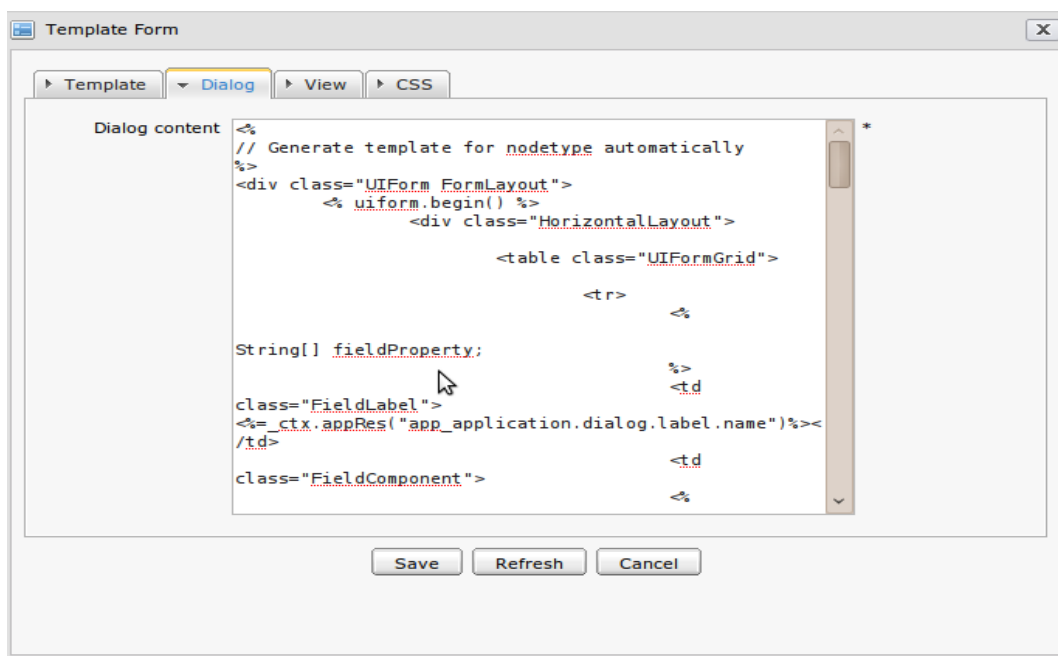


Illustration 146: The Dialog tab

Step 8: Select the **View** tab and enter values in the **View content** field.

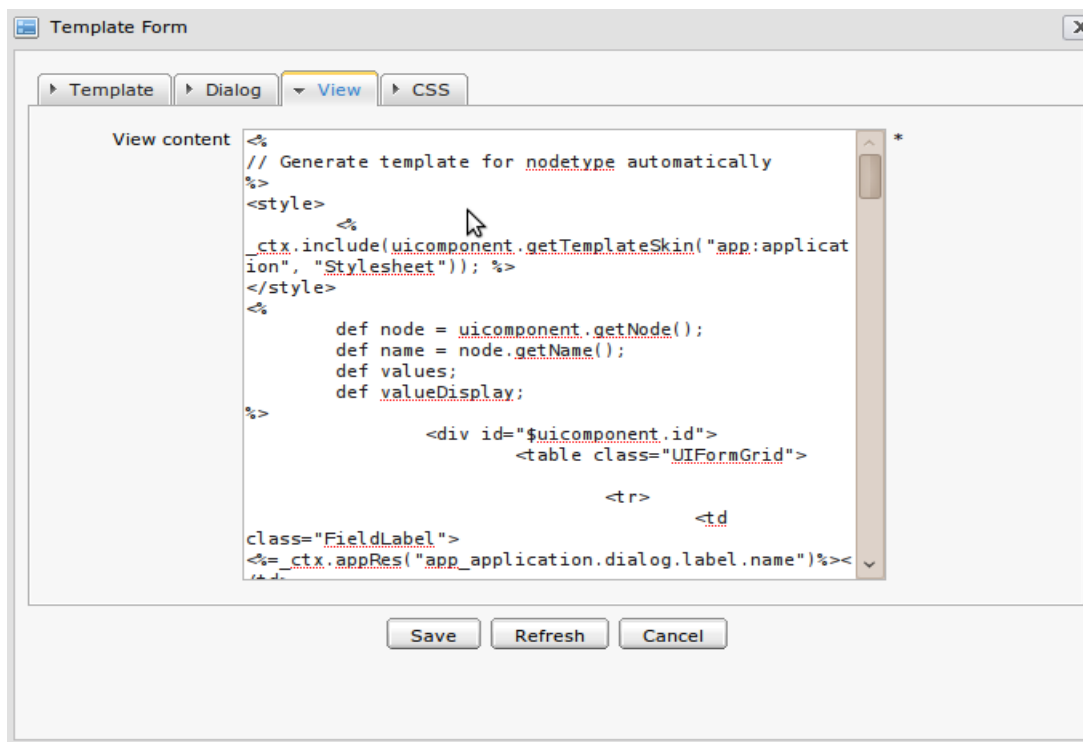


Illustration 147: The View tab

Step 9: Select the **CSS** tab and enter values into the skin field. (Not required).

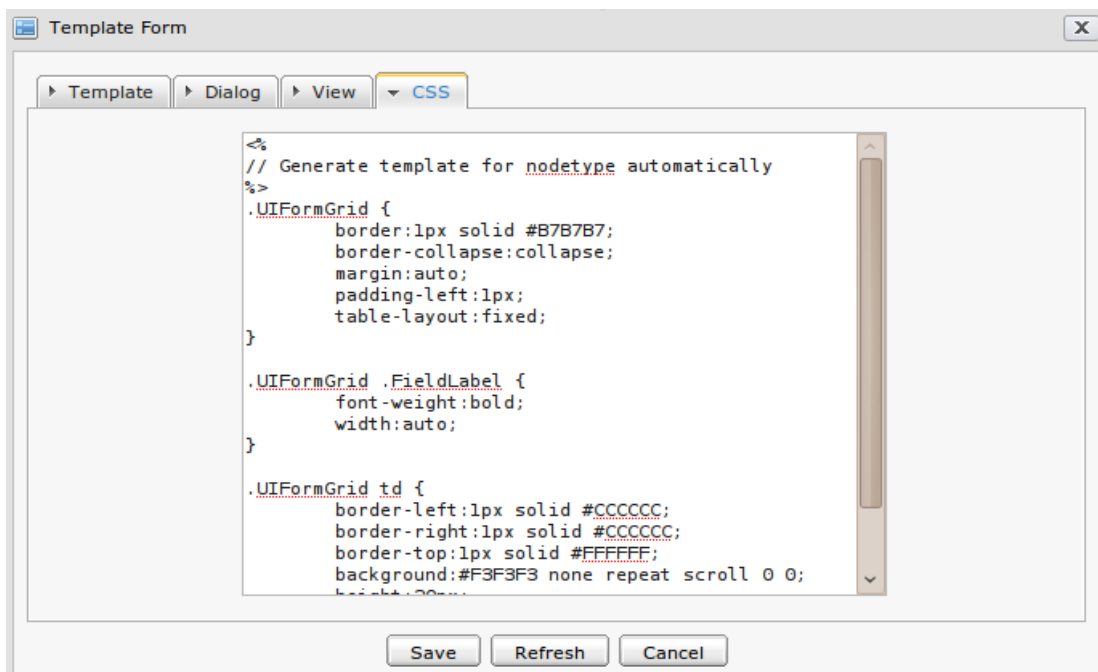



Illustration 148: The CSS tab

Step 10: Click **Save** to accept adding a new template.

4.3.1.2 Edit a Template

- ✓ To edit a template as follows:

Step 1: Click the  icon in the Action column corresponding to the template that you want to edit.

The **View & Edit Template** form will appear like:

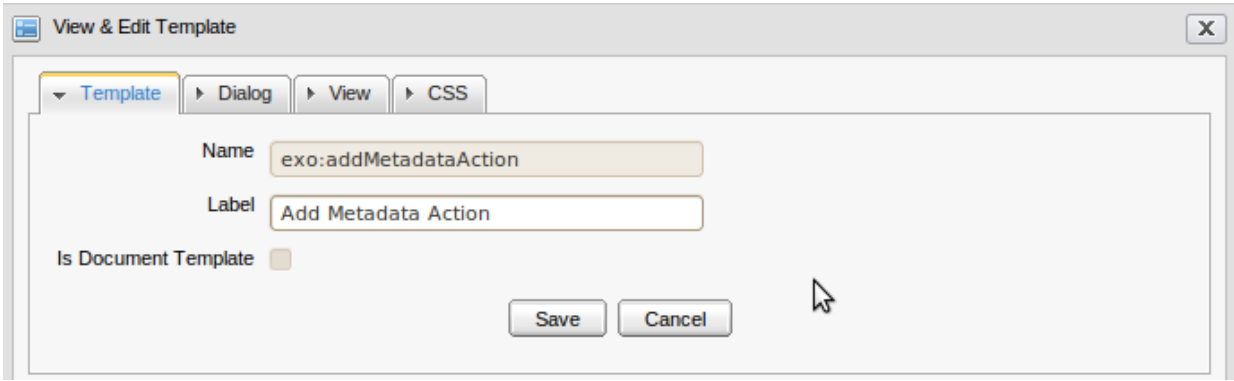
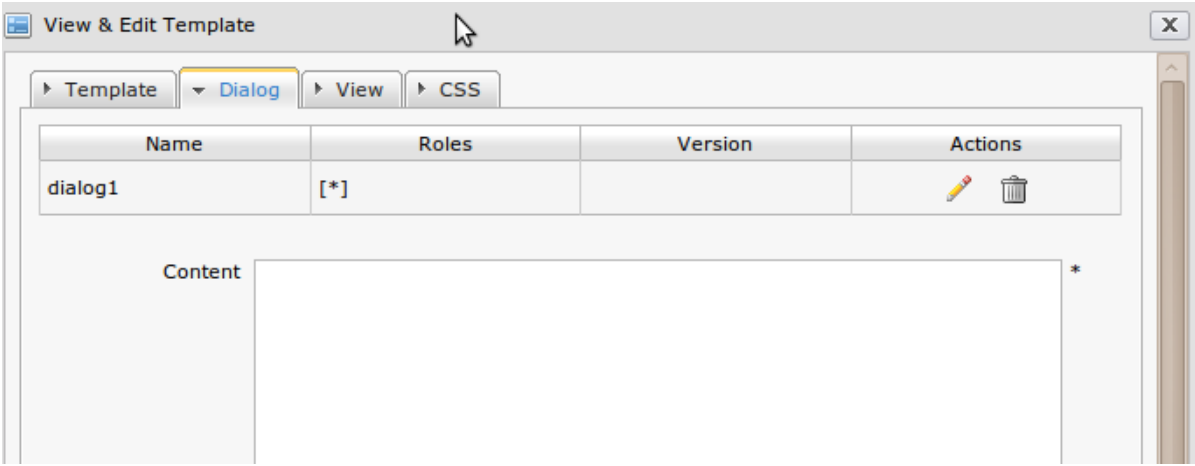



Illustration 149: The View & Edit Template form

Step 2: In the **Template** tab, edit the properties that you want.

Step 3: In the **Dialog** tab, you can add dialogs, edit or delete them.



Name	Roles	Version	Actions
dialog1	[*]		 

Content *




- You can not edit the template name.
- You can not check/uncheck in 'Is Document Template' checkbox.
- 'Label' field can be blank.

- ✓ To Add a dialog do as follows:

Step 1: Input content for this dialog in the '**Content**' field. Input name for this dialog. (*Required).

Step 2: Select permissions for a group that can use this dialog. (*Required).

- ✓ To edit a dialog do as follows:

Step 1: Click the  icon on a dialog you want to edit.

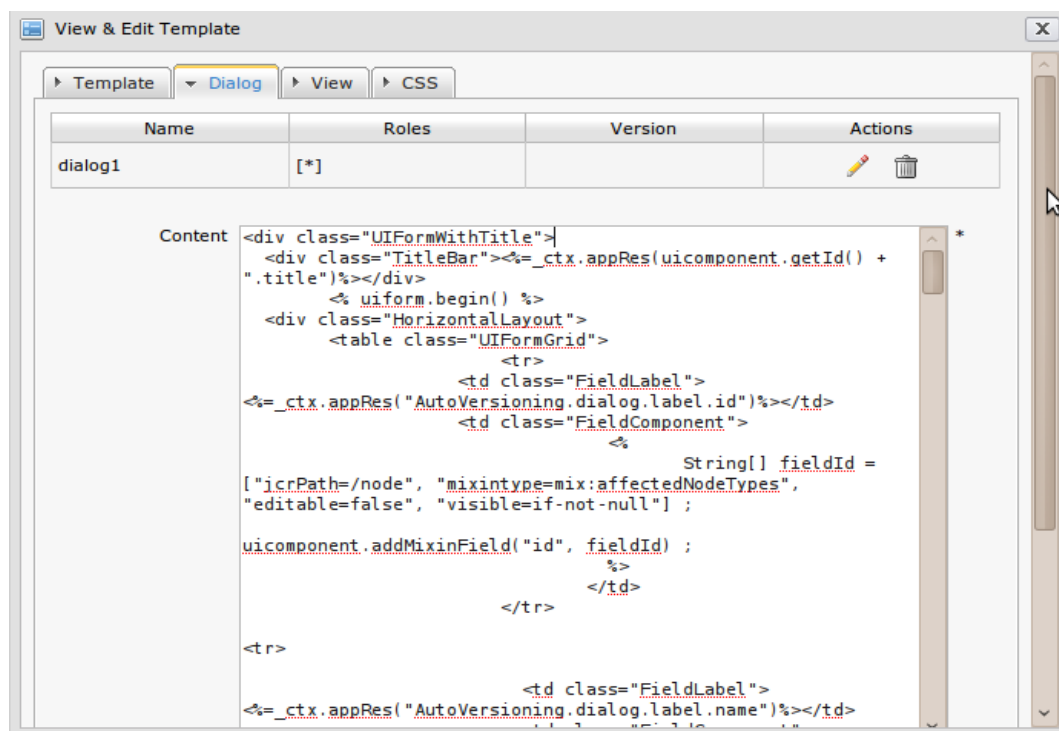


Illustration 150: The Edit a dialog form

Step 2: Edit the current dialog's properties.

Step 3: Click **Save** to accept all changes of the dialog.




You can not change the dialog name.

If you select the 'is Enable Version' check-box, this dialog will automatically increase to 1 version after you click Save. It is displayed at 'Version' column in **Dialog** tab.

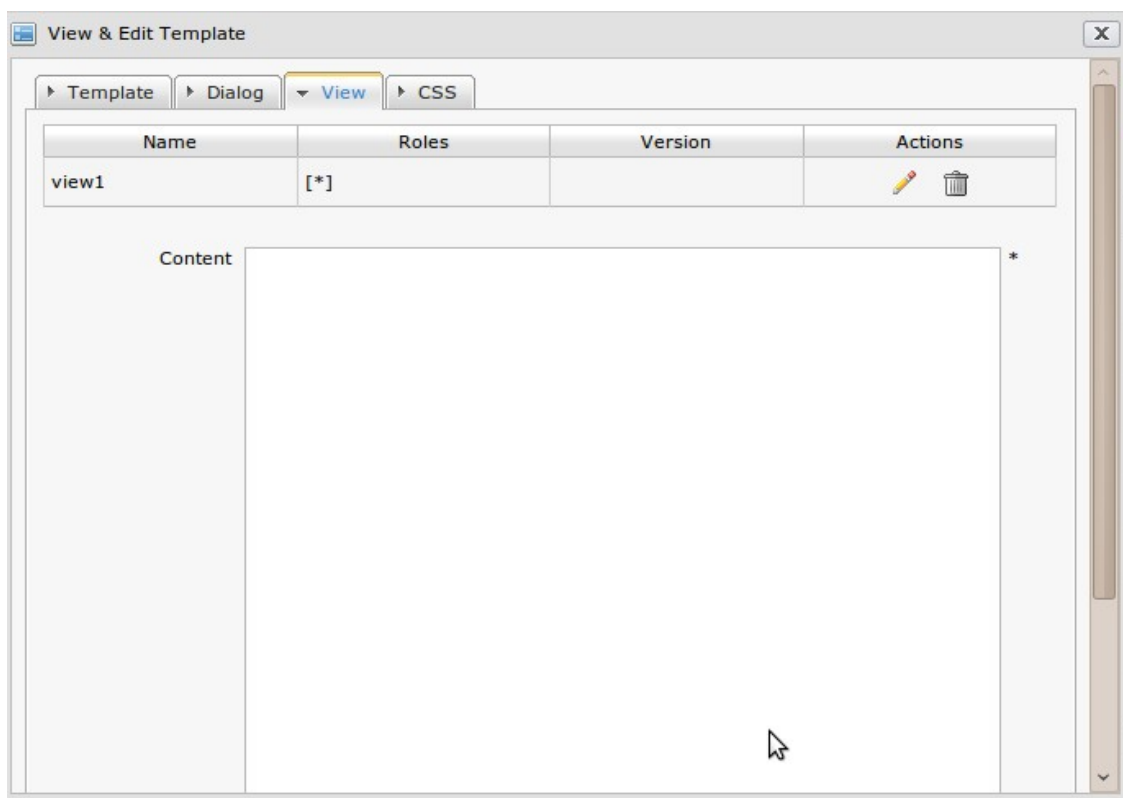
If the dialog has at least 2 versions, in the **Dialog** tab, it will display **Restore** button that allows restoring the dialog version.

- ✓ To delete a dialog, do as follows:

Step 1: Click  corresponding to the dialog that you want to delete.

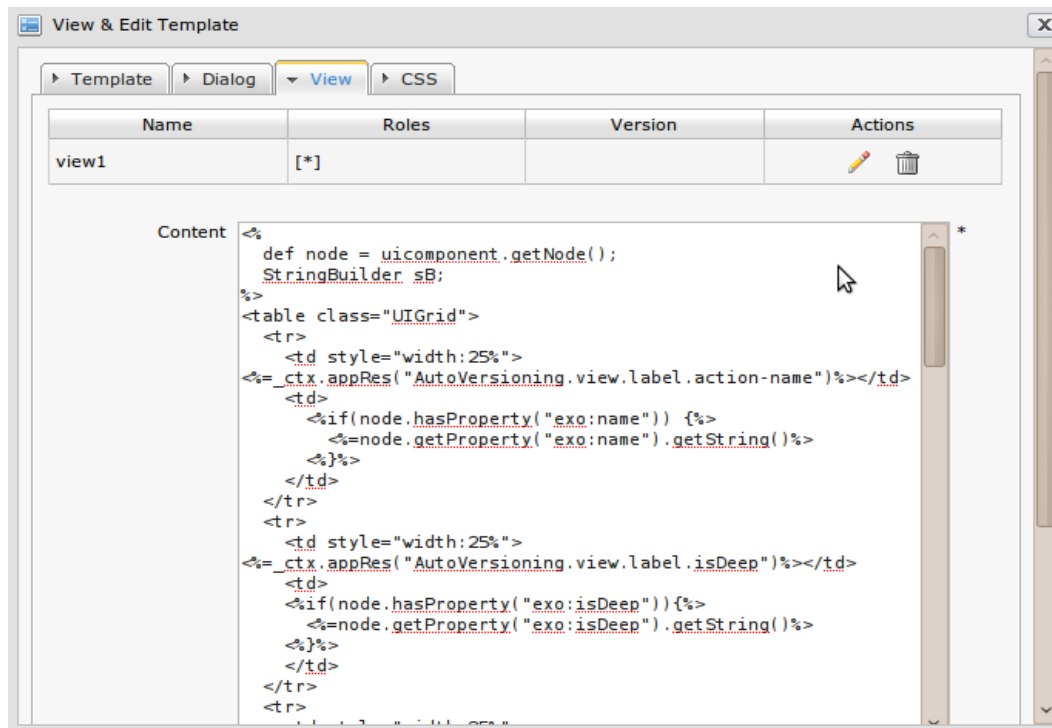
Step 2: Click **OK** on the confirmation message to accept deleting, or **Cancel** to discard this action.

Step 3: In the **View** tab, you can add views, edit or delete them.



You can not delete the default dialog.

- ✓ To add a view, do as follows:




(*) required

Step 1: Select the View tab. Enter content for content filed.

Step 2: Input name for this view. (*Required).

Step 3: Select permission for the group that can use this view.

- ✓ To edit a view, do as follows:

Step 1: Click  corresponding to the view that you want to edit.

Step 2: Edit the properties of the current view.

Step 3: Click **Save** to accept all changes of the view.



You can not change the view name.

If you click 'is Enable Version' checkbox, this view automatically increases to 1 version after you have clicked **Save**. It is displayed at 'version' column in the **View** tab.

If the dialog has at least 2 versions, in the **View** tab, it displays the **Restore** button that allows restoring the view version.

- ✓ To delete a view do as follows:

Step 1: Click the trash icon  corresponding to the view you want to delete.

Step 2: Click **OK** on the confirmation message to accept deleting, or **Cancel** to discard

this action.

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



You cannot delete the default view.

- ✓ To add a CSS, do as follows:

Step 1: Click the CSS tab, enter content in the **Content** field. (*Required).

Step 2: Input a name in the **Name** field. (*Required).

Step 3: Select permissions for a group that can use this dialog. (*Required).

4.3.1.3 Delete a Template

Do the following:

Step 1: Click the trash icon  corresponding to the template that you want to delete.

Step 2: Click **OK** to accept deleting this template, or **Cancel** to discard this action.

4.3.2 Metadata Management

Metadata have multiple definitions, the most brief one is "data about data." Generally, it may be understood as information that describes, or supplements the central data.

The metadata management allow managing nodes in the metadata format in the **WCM** system.

The metadata may be considered as information used to describe the data. When data are provided to the end users, the metadata allow users to understand about information in more details. All metadata nodes can combine with other nodes to create a new node (add mix).

This section includes Viewing Metadata, Editing and Deleting functions.

Go to **Sites Administration | Content Presentation | Manage Metadata**.

4.3.2.1 View Metadata

Do the following:

Step 1: Click the  icon corresponding to the metadata that you want to view.

The Metadata information form will appear:


Metadata Name	Is mixin types	Orderable children
dc:elementSet	✓ true	✗ false

Element Name	Type	Description
CV	dc:coverage	String
RT	dc:resourceType	String
CR	dc:creator	String
DS	dc:description	String
LG	dc:language	String
PD	dc:publisher	String
SB	dc:subject	String
CB	dc:contributor	String
SC	dc:source	String
R	dc:rights	String
TI	dc:title	String

Illustration 151: The Metadata information form

4.3.2.2 Edit Metadata

Do the following:

Step 1: Click the  icon corresponding to the metadata that you want to edit.

The Edit Metadata's Template form will appear:

Metadata name: dc:elementSet

Permission: *

Buttons: Apply, Cancel

Illustration 152: The Edit Metadata's Template

Step 2: Change properties of the edited metadata. Note that you can not edit the metadata name.

Step 3: Click **Apply** to finish all changes.

4.3.2.3 Delete Metadata

Do the following:

Step 1: Click the trash icon  corresponding to the metadata that you want to delete.

A confirmation message will appear.

Step 2: Click **OK** to accept deleting this template, or **Cancel** to discard this action.

4.3.3 Manage Views

The function **Manage View** is used to control view ways of a user. It has 3 tabs: View, **WCM** Templates and BC Templates tabs.

Go to **Sites Administration | Content Presentation | Manage View**.































Views ▶ ECM Templates ▶ BC Templates				
Name	Permissions	Action Tab	Base Version	Action
taxonomy-list	*:/platform/users	[Info] [Actions]		  
admin-view	*:/platform /administrators	[Admin] [Info] [Actions] [Collaboration]		  
taxonomy-icons	*:/platform/users	[Actions]		  
anonymous-view	*	[Actions]		  
icon-view	*:/platform/users	[Actions] [Collaboration]		  
slide-show	*:/platform/users	[Actions] [Collaboration]		  
simple-view	*:/platform/users	[Actions] [Collaboration]		  
system-view	*:/platform /administrators	[Info]		  
timeline-view	*:/platform /administrators	[Actions] [Collaboration]		  
cover-flow	*:/platform/users	[Actions] [Collaboration]		  
<input type="button" value="Add View"/>				

Illustration 153: The manage view form

4.3.3.1 View

a) Add a new view

The function is used to add a new view. Do the following:

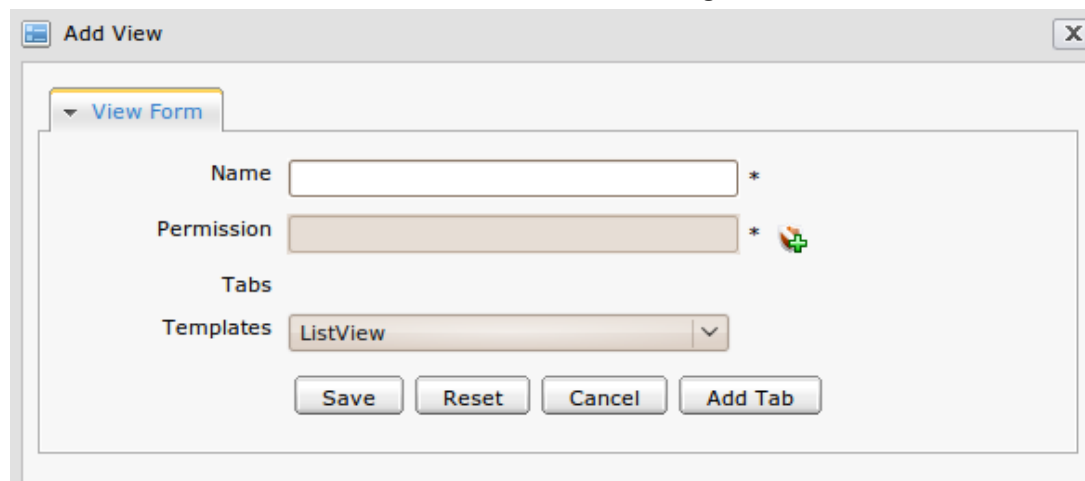


Illustration 154: The Add View form


Step 1: Click the **Add View** at the bottom of the **View** tab to show the **Add View** form like below:

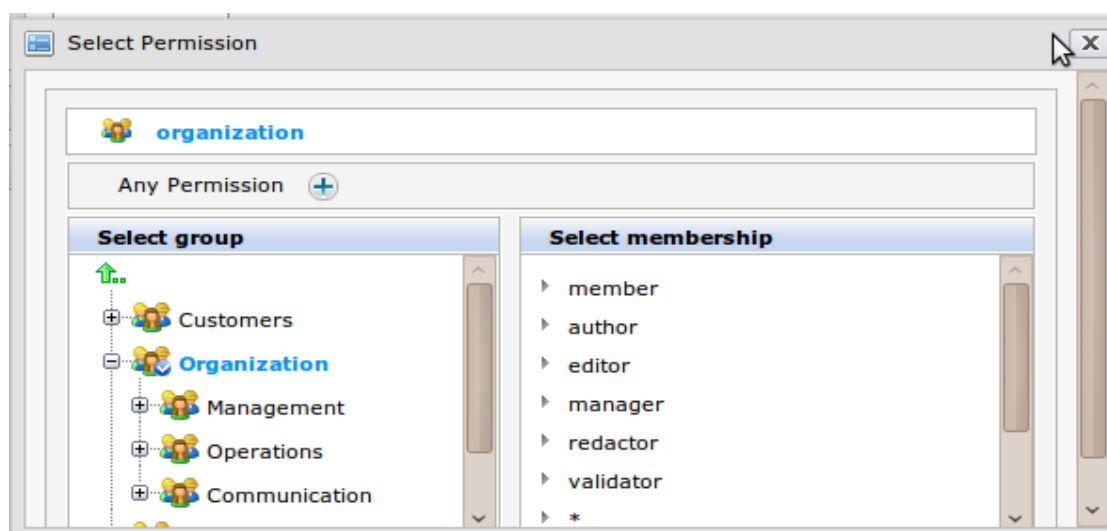
Step 2: Enter the new view name in the **Name** field. (*Required).



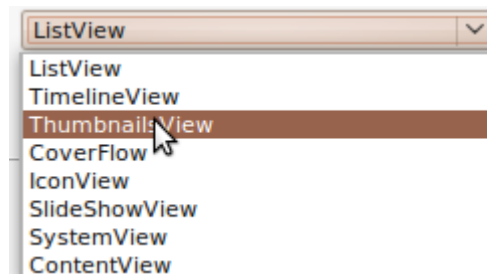
The name must be unique.

*The name must not contain special characters like !, @, #, \$, %, &, *, (,).*

Step 3: Click the  icon to set permissions in this view. The **Select Permission** form will appear:




Step 4: Select a group in the list on the left panel and a specific membership on the right panel. The selected users will have access permissions to this view.



Step 5: Click the  icon in the **Templates** field and select a template for this view.

b) Preview a view

Do the following:

Step 1: Click the  icon in the **Action** column corresponding to the view which you want to preview.

The **View** form will appear:

View

View Form

Name taxonomy-list *

Permission */platform/users *

Tabs [Actions]
[Info]

Templates ListView

Enable Version ☐


Close

Illustration 155: The View form

Step 2: Click **Close** to exit the View form.

c) Edit a view

Do as follows:

Step 1: Click the  icon corresponding to the view that you want to edit. The **Edit View** form appears:

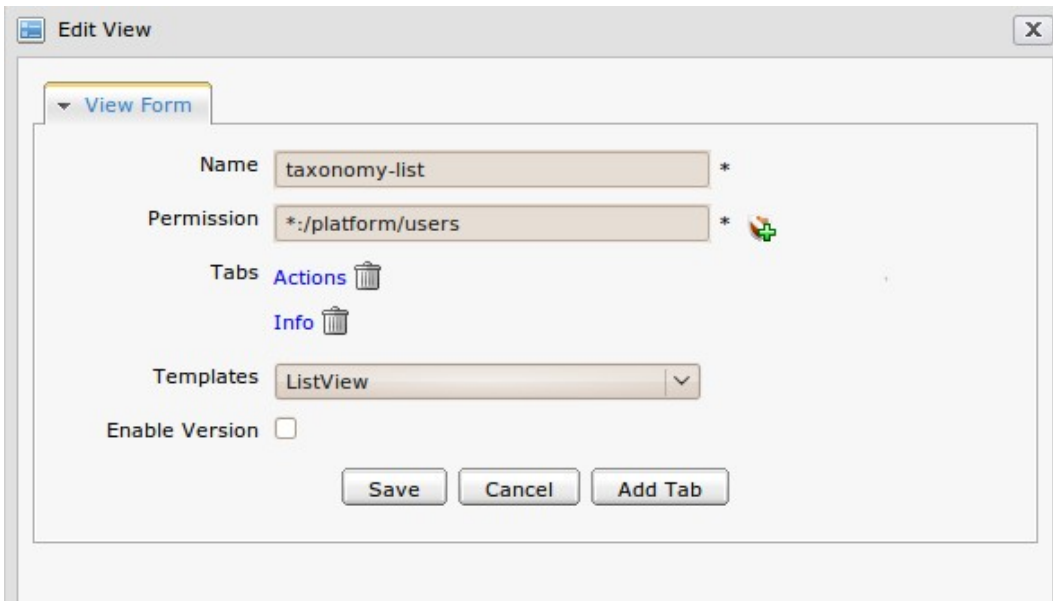


Illustration 156: The Edit View form

Step 2: In the **Edit View** form, edit the properties of the current view.



You can not edit the view name.

*If you check the 'Enable version' option, this view automatically increases to 1 version after you have clicked **Save**. It is displayed at the 'Base version' column in the **View** tab.*

*If the view has at least 2 versions, in the 'Edit ECM Template' form, it displays **Restore** button that allows restoring versions of the template.*

Step 3: Click the **Add Tab** button to open the **Tab Form** tab to add more tabs.

After that, click the **Add Tab** button to add a new tab or the **Reset** button to change values for these fields and click the **Back** button to return to the **View Form** tab in the **Edit View** form.

Step 4: Click **Save** to accept all changes, or **Cancel** to quit without any changes.

d) Delete a view

Do the following:

Step 1: Click  that corresponds to the view which you want to delete. A confirmation

message will appear.

Step 2: Click **OK** to accept deleting, or **Cancel** to discard this action.



You cannot delete a view which is in use.

4.3.3.2 ECM Templates



Manage View















Views			
ECM Templates			
BC Templates			
Name	Value	Base Version	Action
CoverFlow	/exo:ecm/views/templates /ecm-explorer/CoverFlow		 
IconView	/exo:ecm/views/templates /ecm-explorer/IconView		 
ListView	/exo:ecm/views/templates /ecm-explorer/ListView		 
SlideShowView	/exo:ecm/views/templates /ecm-explorer/SlideShowView		 
SystemView	/exo:ecm/views/templates /ecm-explorer/SystemView		 
ThumbnailsView	/exo:ecm/views/templates /ecm-explorer/ThumbnailsView		 
TimelineView	/exo:ecm/views/templates /ecm-explorer/TimelineView		 
Add			

Illustration 157: ECM Templates

a) Add a new ECM Template

Do as follows:

Step 1: Select the **ECM Templates** tab.

Step 2: Click the **Add** button to open the **Add ECM Template** form:

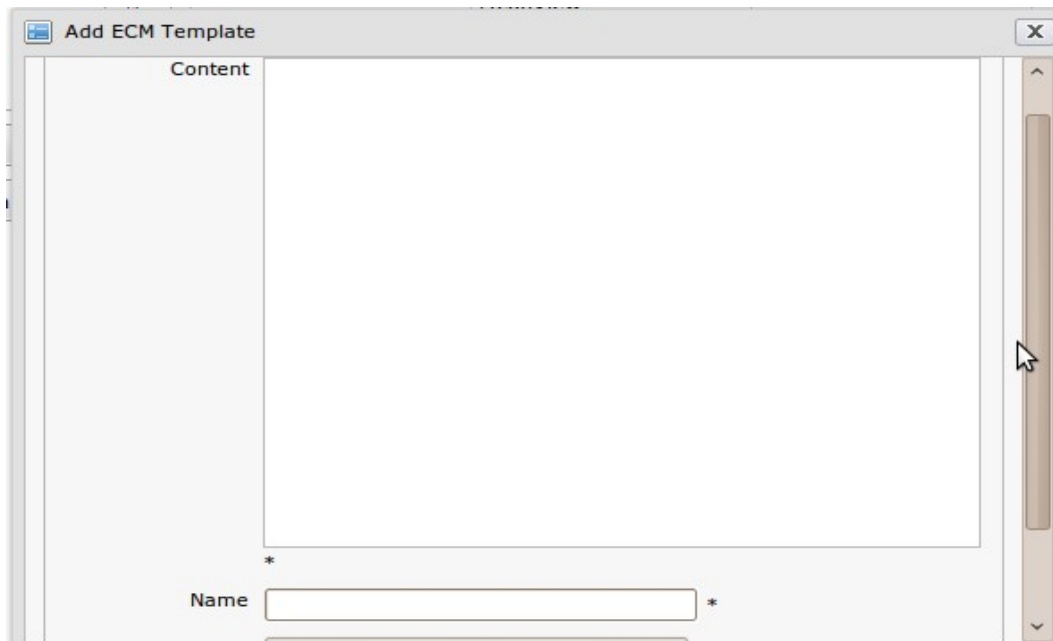


Illustration 158: The Add ECM Template form

(*):required

Step 3: Input content of the template in the **Content** field.

Step 4: Input a name for the template in the **Name** field.

Step 5: Select a type for the template in the '**Template Type**' field.

Step 6: Click **Save** to accept adding a new template, or click **Reset** to change values, or **Cancel** to quit without any changes.



The name of templates must be unique.

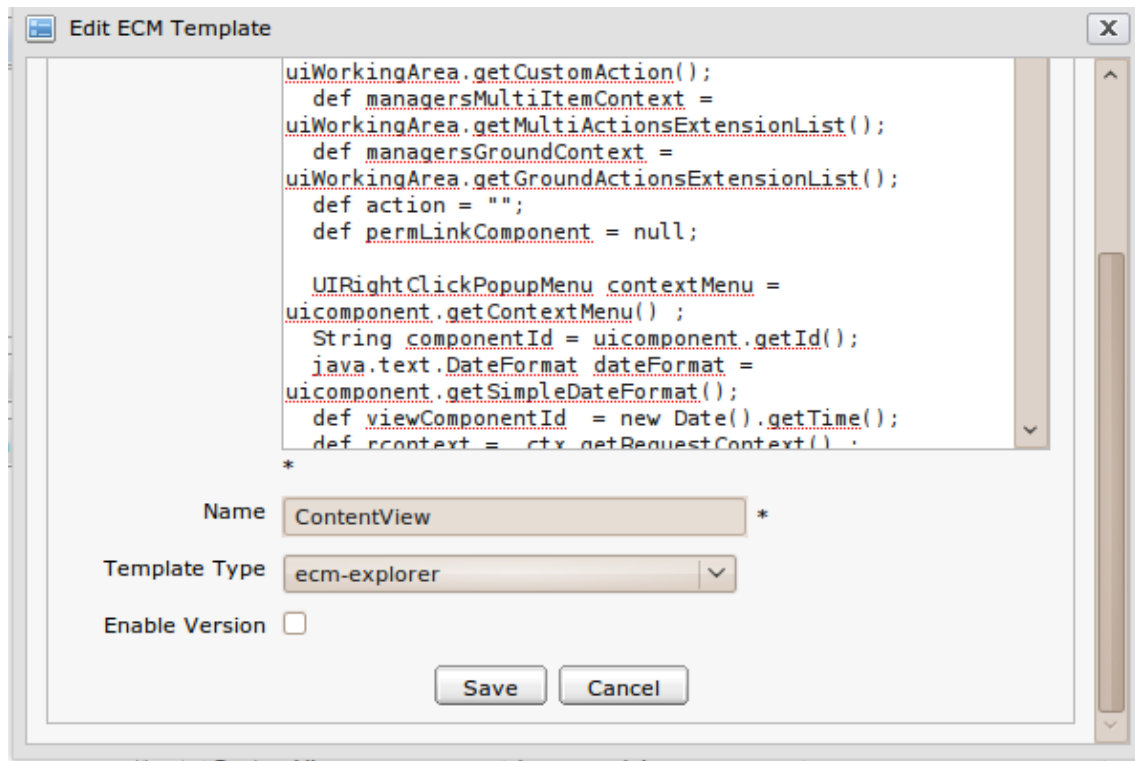
*The name must not contain special characters like !, @, #, \$, %, &, *, (,).*

b) Edit a template

Do as follows:

Step 1: Click the  icon that corresponds to the template you want to edit.

The **Edit ECM Template** form will appear:



```

uiWorkingArea.getCustomAction();
def managersMultiItemContext =
uiWorkingArea.getMultiActionsExtensionList();
def managersGroundContext =
uiWorkingArea.getGroundActionsExtensionList();
def action = "";
def permLinkComponent = null;

UIRightClickPopupMenu contextMenu =
uicomponent.getContextMenu() ;
String componentId = uicomponent.getId();
java.text.DateFormat dateFormat =
uicomponent.getSimpleDateFormat();
def viewComponentId = new Date().getTime();
def rcontext = ctx.getRequestContext();

```

Name *

Template Type

Enable Version ☐

Illustration 159: The Edit ECM Template form

Step 2: Change the current template's properties.

Step 3: Click **Save** to accept all changes, or **Cancel** to quit without any changes.




You can not edit the template name.

If you tick the 'Enable version' checkbox, this template will automatically increase to 1 version after you have clicked **Save**. It is displayed at the 'Base version' column in **ECM Template** tab.

If the template has at least 2 versions, in the 'Edit ECMTemplate' form, it displays the **Restore** button that allows restoring the template version.

c) Delete a template

Do as follows:

Step 1: Click  corresponding to the template you want to edit. A confirmation message will appear.











Step 2: Click **OK** to accept deleting this template, or **Cancel** to discard this action.

4.3.3.3 BC Templates

Views

ECM Templates

BC Templates

Name	Value	Base Version	Action
DocumentView	/exo:ecm/views/templates /content-browser/detail-document/DocumentView		 
PathList	/exo:ecm/views/templates /content-browser/path/PathList		 
QueryList	/exo:ecm/views/templates /content-browser/query /QueryList		 
ScriptList	/exo:ecm/views/templates /content-browser/script /ScriptList		 
TreeList	/exo:ecm/views/templates /content-browser/path/TreeList		 

Add

Illustration 160: BC Templates

a) Add a new BC Template

Do as follows:

Step 1: Click **Add** to open the **Add BC Template** form:

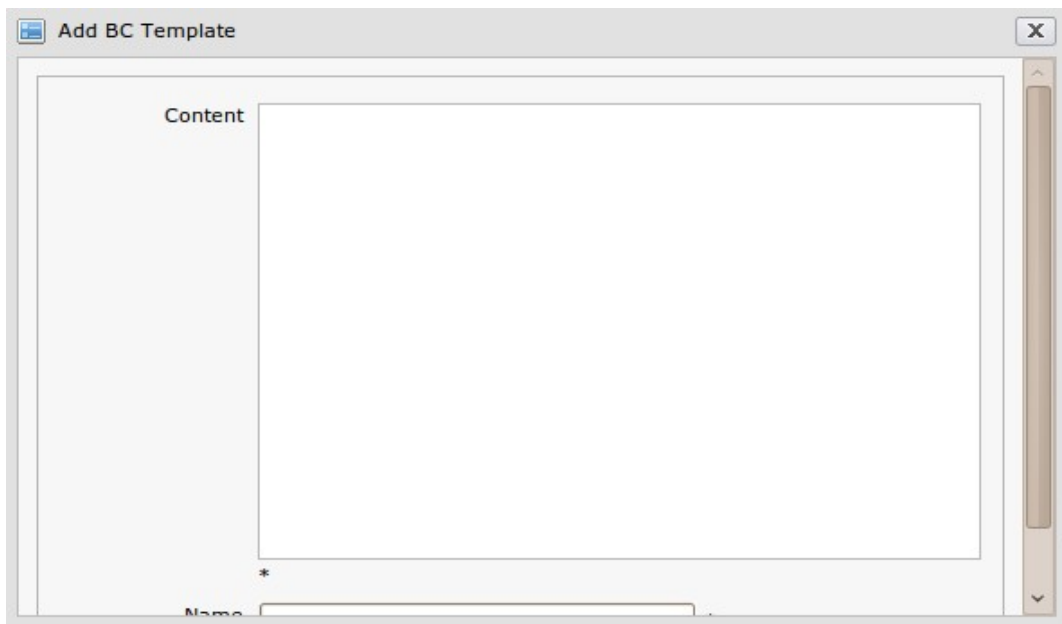


Illustration 161: Add BC Templates form

Step 2: Input the content for the template in the **Content** textbox. (*Required).

Step 3: Input the name for the template in the **Name** field. (*Required).

Step 4: Select the template type by clicking  in the **Template Type** field.



Step 5: Click **Save** to complete adding a new template.




The name must be unique.

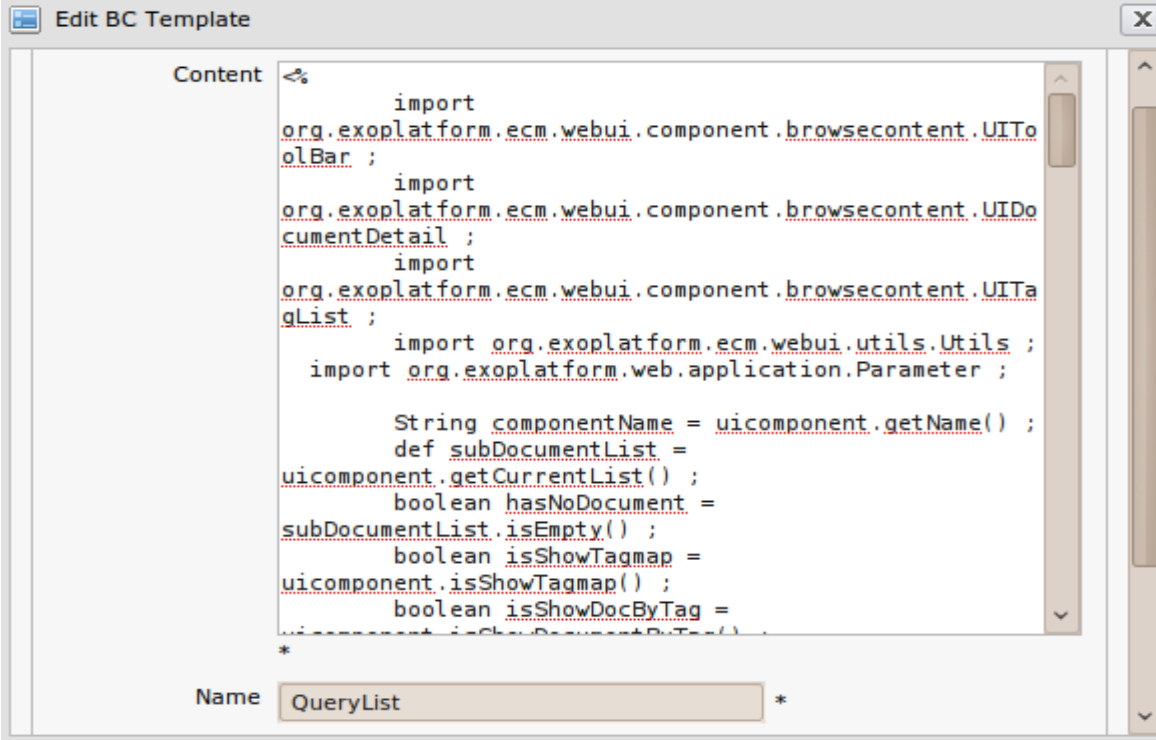
*The name must not contain special case like !, @, #, \$, %, &, *, (,).*

b) Edit a template

Do as follows:

Step 1: Click the  icon on a template that you want to edit.

The **Edit BC Template** form will appear:



Edit BC Template

Content

```
<%
import
org.exoplatform.ecm.webui.component.browsecontent.UITo
olBar ;
import
org.exoplatform.ecm.webui.component.browsecontent.UIDo
cumentDetail ;
import
org.exoplatform.ecm.webui.component.browsecontent.UITa
gList ;
import org.exoplatform.ecm.webui.utils.Utils ;
import org.exoplatform.web.application.Parameter ;

String componentName = uicomponent.getName() ;
def subDocumentList =
uicomponent.getCurrentList() ;
boolean hasNoDocument =
subDocumentList.isEmpty() ;
boolean isShowTagmap =
uicomponent.isShowTagmap() ;
boolean isShowDocByTag =
uicomponent.isShowDocByTag() ;
*
```

Name *

Illustration 162: The Edit BC Template form

Step 2: Edit the properties of the current BC Template.

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



You can not edit the template name.


You can not edit the template type.

If you click the 'Enable Version' checkbox, this template will automatically increase to 1 version after you have clicked **Save**. It is displayed at the 'Base version' column in the 'BCTemplate' tab.

If the template has at least 2 versions, in the **Edit BC Template** form, it displays the **Restore** button that allows restoring the template version.

c) Delete a template

Do as follows:


Step 1: Click the  icon corresponding to a template you want to edit. The confirmation message will appear.





Step 2: Click **OK** to accept deleting this template, or **Cancel** to discard this action.

4.3.4 Drives Management

The function is used to manage drives in the File Explorer. It allows adding, editing and deleting drives.

Go to **Sites Administration | Content Presentation | Manage Drives**.

 **Manage Drives**

Icon	Name	Workspace	Home Path	Permissions	View	Action
	Trash	collaboration	/Trash	*:/platform /administrators	icon-view, simple-view, cover-flow	 
	Validation Requests Documents Center	collaboration	/Documents /Validation Requests	*:/platform/users	simple-view, admin-view	 





Total pages: 4   1 2 3 4  

Illustration 163: Manage Drives

4.3.4.1 Add a new drive

Do as follows:

Step 1: Click the **Add Drive** button in the **Manage Drives** form to open the **Add Drive** form.

The screenshot shows the 'Add Drive' form with the following fields and options:

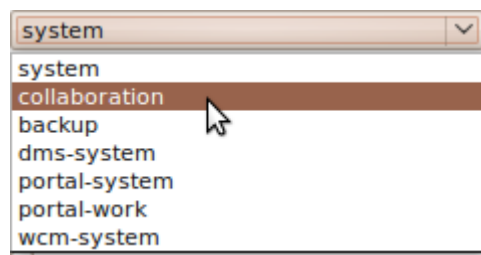
- Name:** A text input field with an asterisk indicating it is required.
- Workspace:** A dropdown menu currently set to 'system'.
- Home path:** A text input field with a green plus icon for selection.
- Workspace icon:** A text input field with a blue plus icon for selection.
- Permissions:** A text input field with an asterisk, a green plus icon, and a trash icon.
- Show referenced documents:** ☐
- Show "non document" nodes:** ☐
- Show sidebar:** ☐
- Show hidden nodes:** ☐
- Allowance to create folder:** A list box containing the following options: 'exo:jsFolder', 'Unstructured folder', 'exo:webFolder', 'exo:linkFolder', 'exo:cssFolder', and 'Folder'.
- Allowance nodetype on left tree:** A text input field with a blue plus icon and a trash icon.


At the bottom of the form are three buttons: 'Save', 'Refresh', and 'Cancel'.

Illustration 164: The Add Drive form

Step 2: Input a name for the new drive in the **Name** field. (*Required).

Step 3: Select a workspace for the drive. There are 4 available workspaces: system, collaboration, backup, and dms-system.



Step 4: Select the home path for the drive by clicking the  icon .

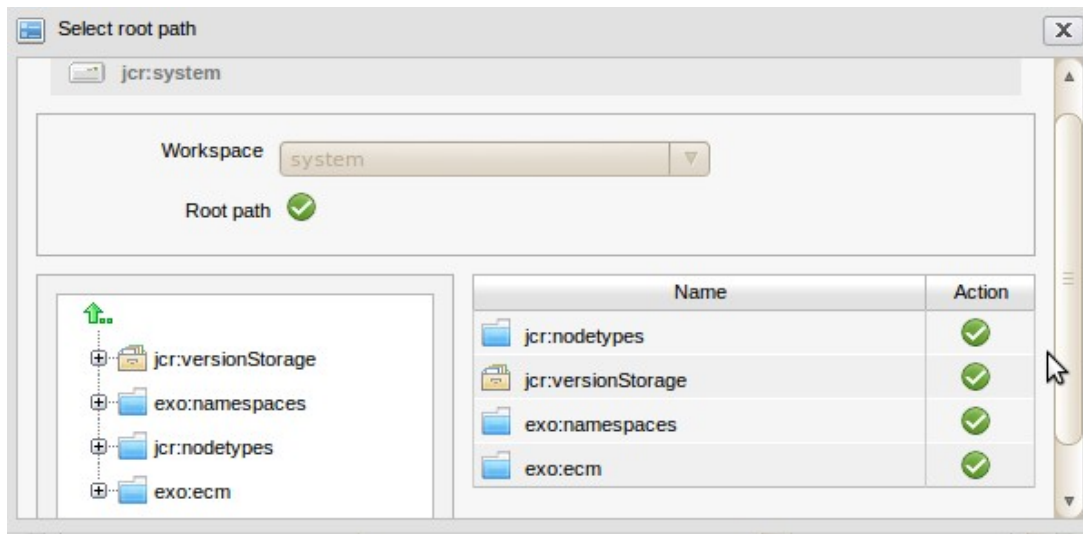



Illustration 165: The Select root path form

Step 5: Click the  icon to select the home path.

Step 6: Select an icon for the workspace by clicking the  icon .

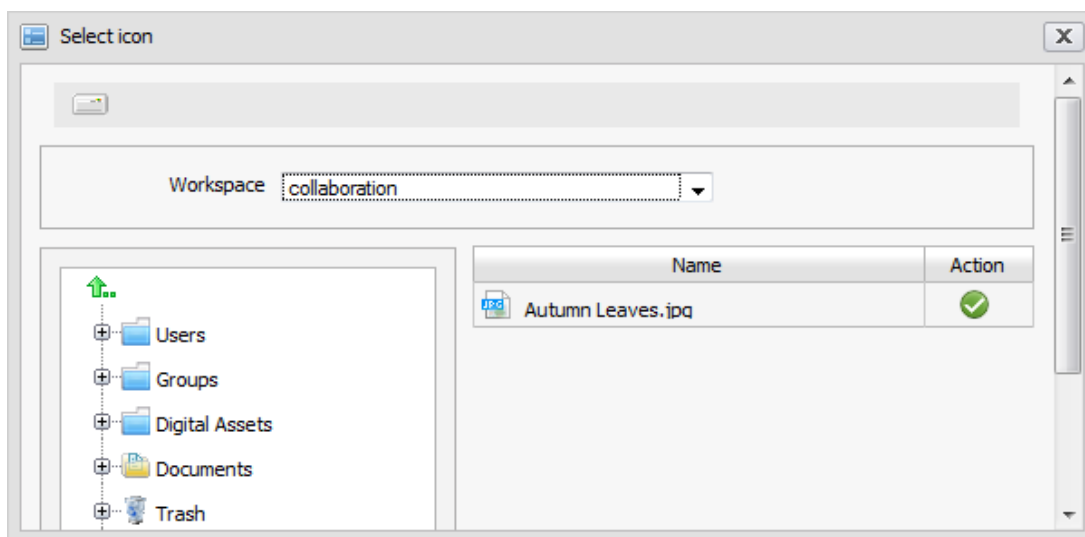

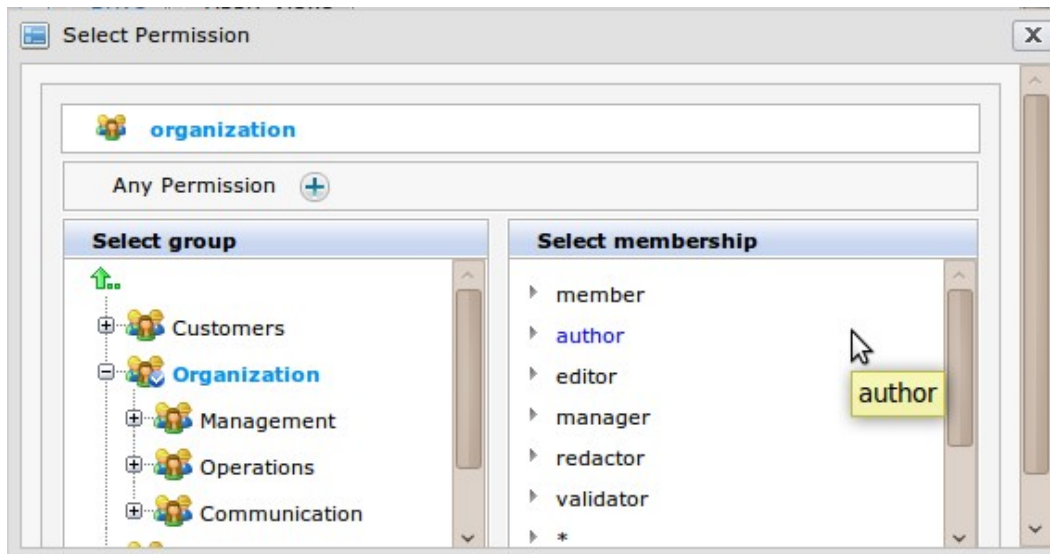


Illustration 166: The Select icon form

Step 7: Click  icon to select an icon for the workspace.

Step 8: Select permissions for groups that have access right to this drive by clicking the

 icon . (*Required).




Step 9: Select/unselect the checkboxes to show/hide in drive by default.

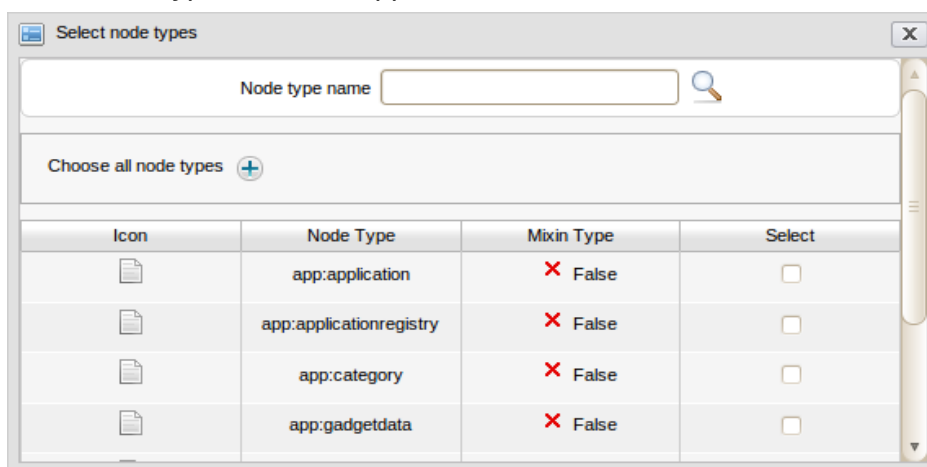
- Show referenced document: allows viewing preference documents.
- Show non-document: allows viewing non-documents.
- Show sidebar: allows showing the sidebar.
- Show hidden node: allows showing the hidden nodes.

Step 10: Select the document type that will be created in this drive.

- Folder: you only can create a folder called nt:folder in this drive.
- Unstructured folder: you only can create a folder called nt:unstructured in this drive

Step 11: Select a node type by clicking .


The select node types form will appear like the illustration below:

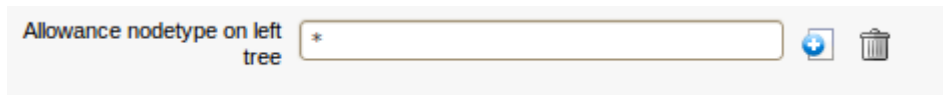


In this step, you can enter the name you need to search in the field '**Node type name**'.

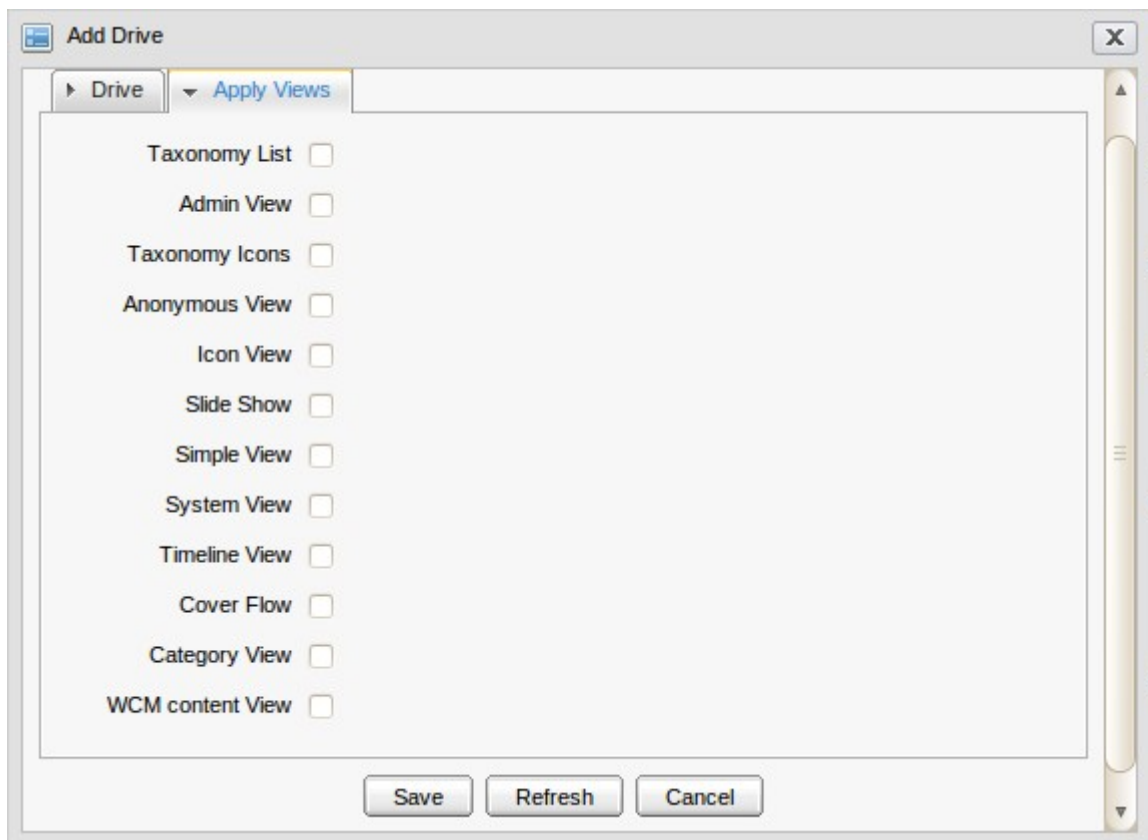
Then, click the magnifying glass icon to start searching. All the node types containing

the search string will be displayed below.

Mark the checkbox corresponding to the desired node type in the Select column or click the icon to choose all node types. If you click the icon , the **star** icon will appear in the field 'Allowance nodetype on left tree'.



Click the trash icon if you want to remove the selected nodetype.




Step 11: Select the **Apply Views** tab.

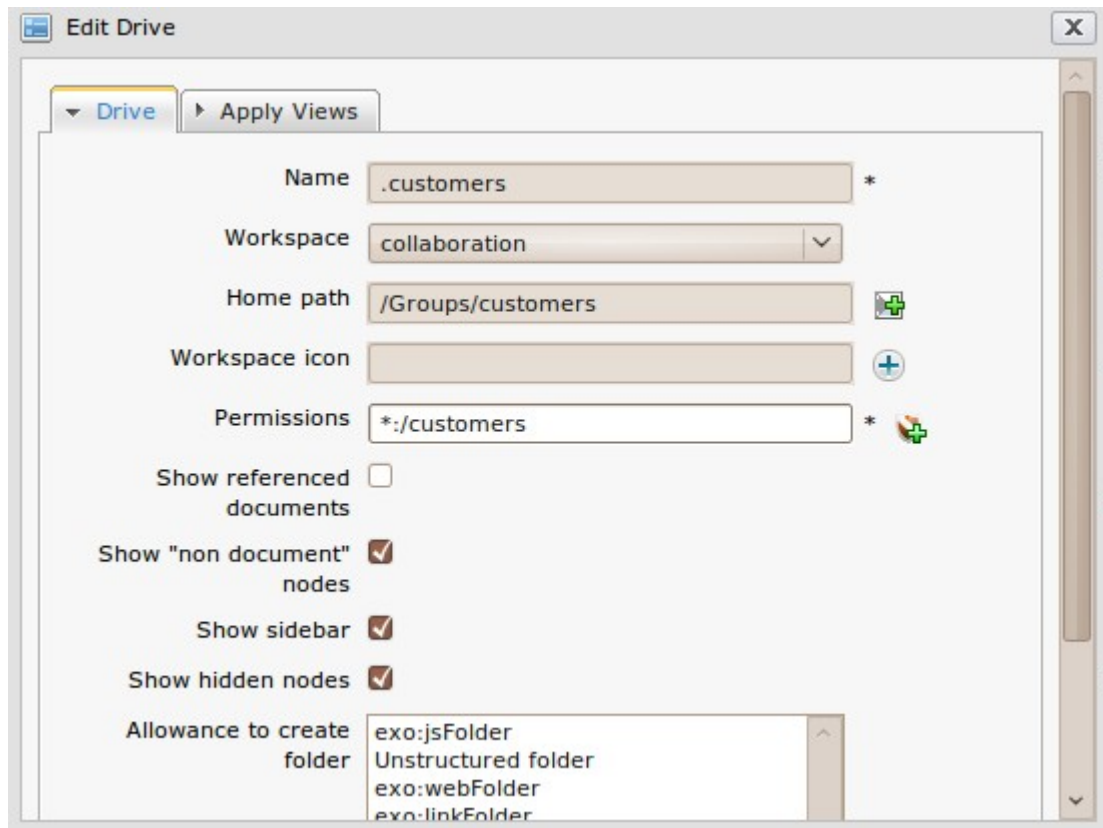
Step 12: Select the view type that you want to be available in drive.

Step 13: Click **Save** to finish adding a new drive.

4.3.4.2 Edit a drive

Do as follows:

Step 1: Click the  icon that corresponds to the drive that you want to edit. The **Edit drive** form will appear:



Step 2: Edit the properties of the current drive.


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



You cannot edit the drive name.

4.3.4.3 Delete a drive

Do as follows:

Step 1: Click  corresponding to the drive that you want to delete. A confirmation message will appear.

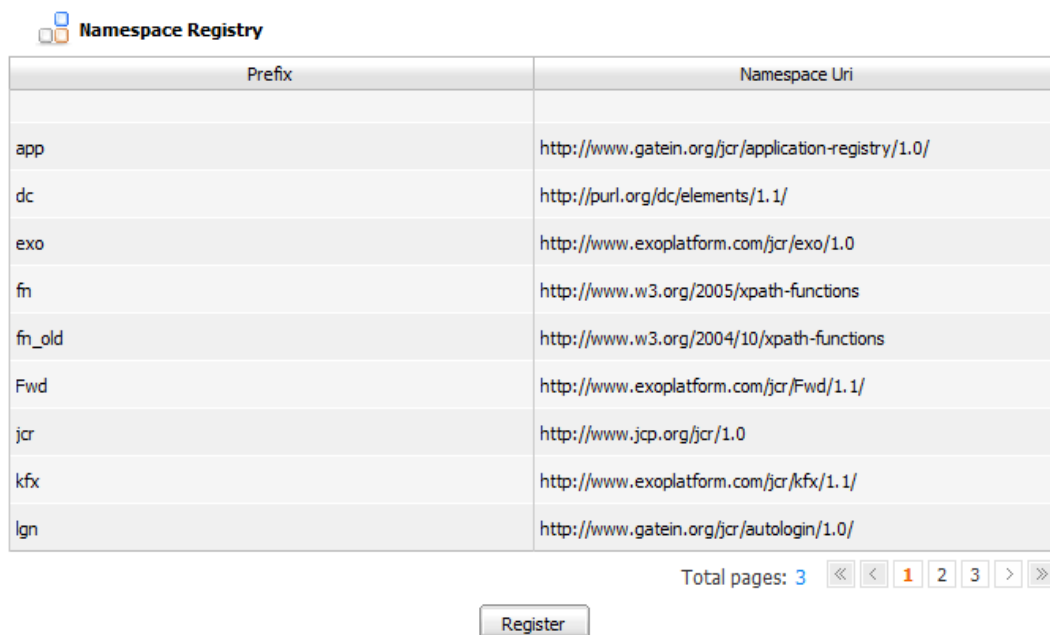
Step 2: Click **OK** to accept deleting this drive, or **Cancel** to discard this action.

4.4 Types of Content

4.4.1 Namespace Registry

The namespace is used as a prefix of node type that describes all the node type properties. This function allows users to register the namespace used in the system.

Go to **Sites Administration | Types of Content | Namespace Registry**.



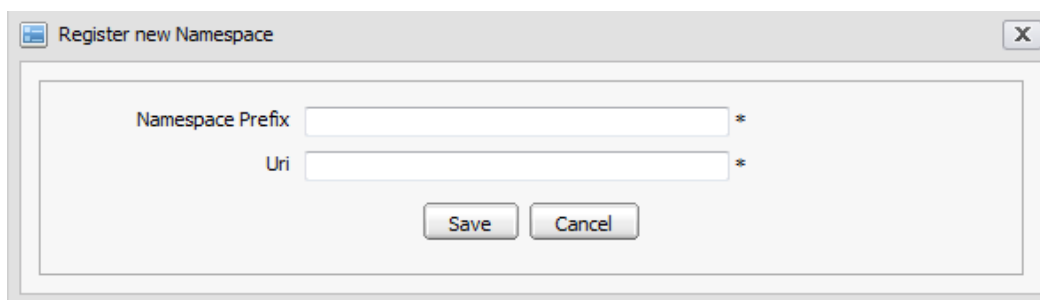
Prefix	Namespace Uri
app	http://www.gatein.org/jcr/application-registry/1.0/
dc	http://purl.org/dc/elements/1.1/
exo	http://www.exoplatform.com/jcr/exo/1.0
fn	http://www.w3.org/2005/xpath-functions
fn_old	http://www.w3.org/2004/10/xpath-functions
Fwd	http://www.exoplatform.com/jcr/Fwd/1.1/
jcr	http://www.jcp.org/jcr/1.0
kfx	http://www.exoplatform.com/jcr/kfx/1.1/
lgn	http://www.gatein.org/jcr/autologin/1.0/

Total pages: 3 << < 1 2 3 > >>

Register

Illustration 167: Namespace Registry

Step 1: Click the **Register** button in the **Namespace Registry** form to register a new namespace:



Register new Namespace

Namespace Prefix *

Uri *

Save Cancel

Illustration 168: The Register new Namespace form

Step 2: Enter the value for the **Namespace Prefix** field. (* Required).

Step 3: Enter the value for the **Uri** field. This field must be unique. (*Required).

Step 4: Click **Save** to finish registering a new name space.



The namespace must be unique.

The namespace must not contain special characters like !, @, #, \$, %, &, *, (,).

4.4.2 Manage Node Type

The function is used to control all node types in WCM.

Go to **Sites Administration | Types of Content | Manage NodeType**.



Manage Node Type

Node type name

Icon	Node type	Mixin type	Orderable child nodes	Description	Action
	app:content	✗ false	✗ false	nothing	
	app:contentcategory	✗ false	✓ true	nothing	
	app:contentregistry	✗ false	✓ true	nothing	
	app:gadgetdata	✗ false	✗ false	nothing	
	app:gadgetdefinition	✗ false	✗ false	nothing	
	app:gadgetregistry	✗ false	✗ false	nothing	
	app:localgadgetdata	✗ false	✗ false	nothing	
	app:remotegadgetda	✗ false	✗ false	nothing	
	dc:elementSet	✓ true	✗ false	nothing	
	exo:accessControllab	✓ true	✗ false	nothing	

Total pages: 18

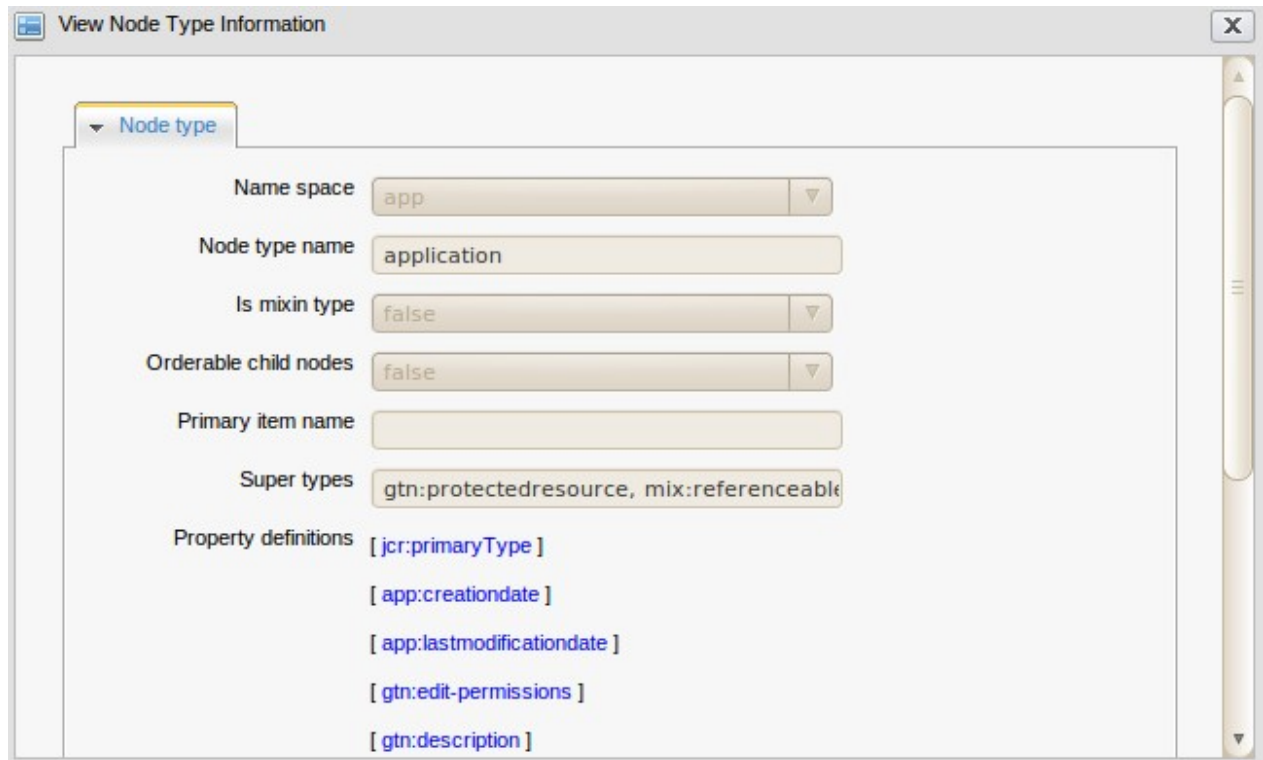
Illustration 169: The Manage Node Type form

4.4.2.1 View node types

Do as follows:

Step 1: Click the icon that corresponds to a node type you want to view.

The **View Node Type Information** form will appear:



The screenshot shows a web browser window titled "View Node Type Information". Inside the window, there is a tab labeled "Node type". Below the tab, the form contains the following fields:

- Name space:** A dropdown menu with "app" selected.
- Node type name:** A text input field containing "application".
- Is mixin type:** A dropdown menu with "false" selected.
- Orderable child nodes:** A dropdown menu with "false" selected.
- Primary item name:** An empty text input field.
- Super types:** A text input field containing "gtn:protectedresource, mix:referenceable".
- Property definitions:** A list of five properties, each in a blue link-like box:
 - [jcr:primaryType]
 - [app:creationdate]
 - [app:lastmodificationdate]
 - [gtn:edit-permissions]
 - [gtn:description]

Illustration 170: The View Node Type Information form

Step 2: Click **Close** to exit this form.

4.4.2.2 Add node type

Do as follows:

Step 1: Open the **Add/Edit Node Type Definitions** form by clicking the **Add** button:

Illustration 171: The Add/Edit Node Type Definitions form

Step 2: Select a name space for the node. It looks like a node prefix.

Step 3: Enter a node name for the **Node type name** field. This field is required.



The name of node type must be unique.

*The name must not contain special characters like !, @, #, \$, %, &, *, (,).*

Step 4: Select a value for the "Is mixin type" field.

True: this node is mixin type.

False: this node is not mixin type.

Step 5: Select a value for the **Orderable child nodes** field:

True: child nodes are ordered.

False: child node are not ordered.

Step 6: Enter a value for the **Primary item name** field.

Step 7: Super types: click  to add more parent nodes.

Step 8: Property definitions: list all definition names of **Property** tab.

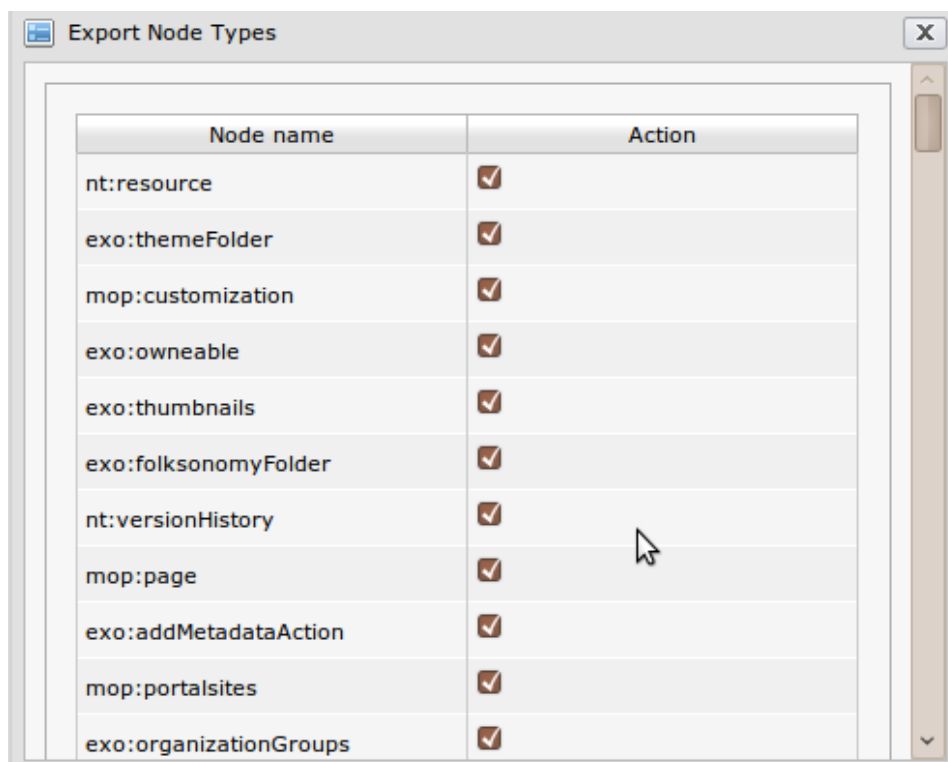
Step 9: Child node definitions: list all definition names of **Child node** tab.

Step 10: Click **Save** to accept adding a new node type, or **Save draft** to save this node type as a draft, or **Cancel** to quit.

4.4.2.3 Export node types

Do as follows:

Step 1 : Click the **Export** button to open the **Export Node Types** form:



Node name	Action
nt:resource	<input checked="" type="checkbox"/>
exo:themeFolder	<input checked="" type="checkbox"/>
mop:customization	<input checked="" type="checkbox"/>
exo:owneable	<input checked="" type="checkbox"/>
exo:thumbnails	<input checked="" type="checkbox"/>
exo:folksonomyFolder	<input checked="" type="checkbox"/>
nt:versionHistory	<input checked="" type="checkbox"/>
mop:page	<input checked="" type="checkbox"/>
exo:addMetadataAction	<input checked="" type="checkbox"/>
mop:portalsites	<input checked="" type="checkbox"/>
exo:organizationGroups	<input checked="" type="checkbox"/>

Illustration 172: The Export Node Types form

Step 2: Click **Uncheck all** if you do not want to export all node types. After clicking **Uncheck all**, this button becomes the **Check all** button.

Step 3: Select nodes that you want to export by ticking the checkboxes.

Step 4: Click the **Export** button in this form.

Step 5: Select the location in your computer to save the exported node.



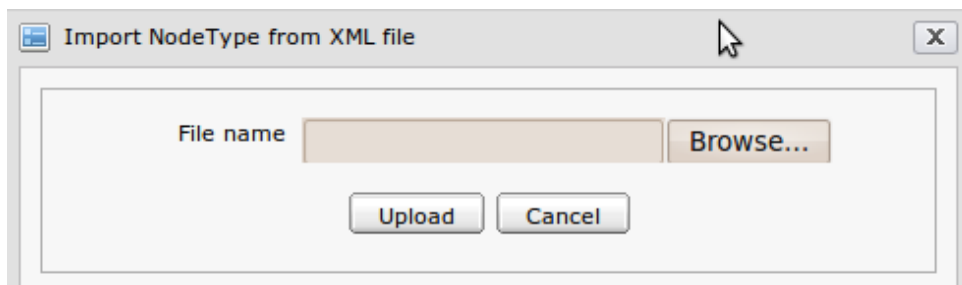
You must select at least 1 node type to be exported.

*If you do not want to export the node, click **Cancel** to quit this pop up.*

4.4.2.4 Import node types

Do as follows:

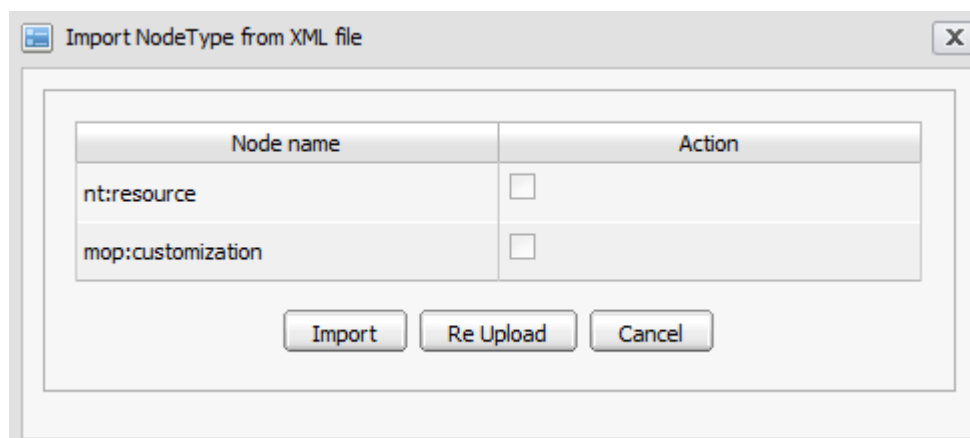
Step 1: Show the **Import Node Type from XML file** form by clicking the **Import** button:



Import NodeType from XML file

File name

Step 2: Browse a file to upload a file.




Import NodeType from XML file

Node name	Action
nt:resource	<input type="checkbox"/>
mop:customization	<input type="checkbox"/>



You must upload an Xml file.

This file is in the node type's format.

If you want to upload a different file, click the  icon to delete the file which has just been uploaded, then upload other files.

Step 3: Click the **Upload** button.

Step 4: Tick checkboxes corresponding to the nodes that you want to import.

Step 5: Click the **Import** button to complete importing a node type.

4.5 Advanced Configuration

4.5.1 Manage Queries

The function is used to manage queries. It allows adding, editing and deleting queries.

Go to **Sites Administration | Advanced Configuration | Manage Queries**.



Manage Queries

Name	Type	Statement	Permissions	Actions
All Articles	xpath	//element(*,exo:article) order by @exo:dateCreated descending	*:/platform/users	
Created Documents	xpath	//*[(@jcr:primaryType = 'exo:article' or @jcr:primaryType = 'nt:file') and @exo:owner='\${UserId}\$'] order by @exo:dateCreated descending	*:/platform/users	
CreatedDocumentDayBefo	xpath	//element(*,exo:article) [@exo:dateCreated < xs:dateTime('\${Date}\$')] order by @exo:dateCreated descending	*:/platform/users	

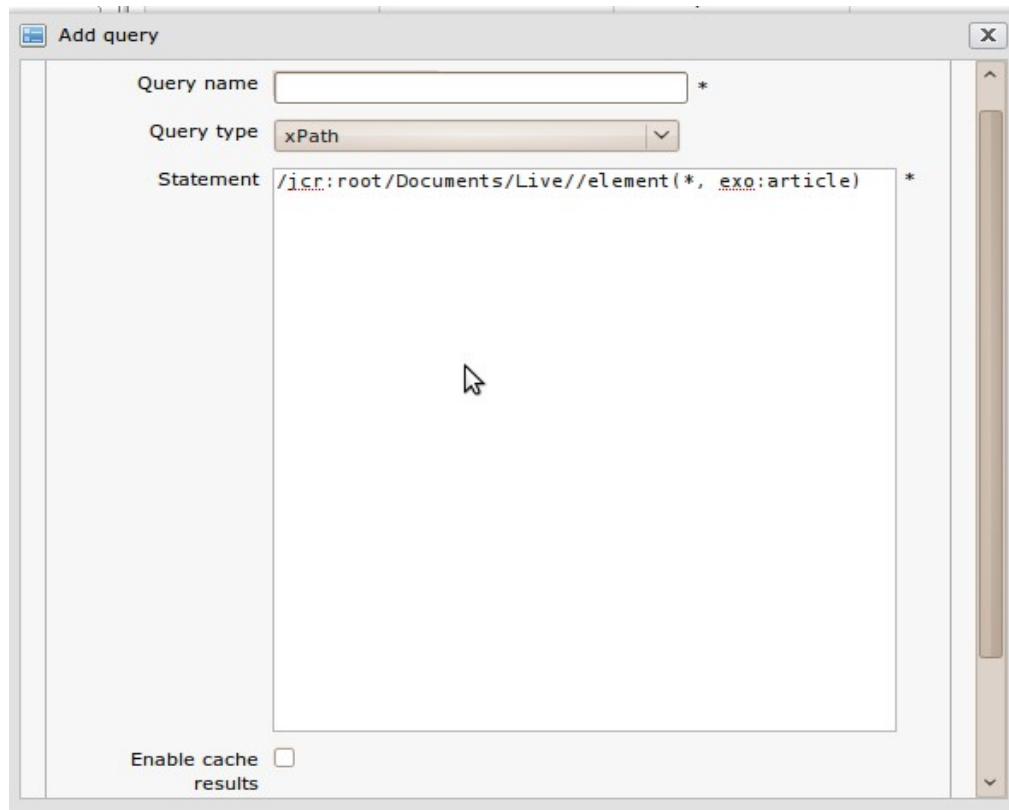
Add Query

Illustration 173: Manage Queries

4.5.1.1 Add a new query

Do as follows:

Step 1: Show the **Add Query** form by clicking the **Add Query** button in the **Manage Queries** form.



The screenshot shows a web-based form titled "Add query". It contains the following elements:

- Query name:** A text input field followed by an asterisk (*).
- Query type:** A dropdown menu currently showing "XPath".
- Statement:** A large text area containing the XPath expression: `/jcr:root/Documents/Live//element(*, exo:article)`, followed by an asterisk (*).
- Enable cache results:** A checkbox located at the bottom left of the form.

Illustration 174: The Add query form

Step 2: Enter a query name for the **Name** field.



The query name must be unique.

*The name must not contain special characters like !, @, #, \$, %, &, *, (,).*

Step 3: Select the query type.

Xpath:(XML Path Language) is a language for selecting nodes. For example,
`/jcr:root/Documents/Live`

Sql:(Structured Query Language) is a database computer language.

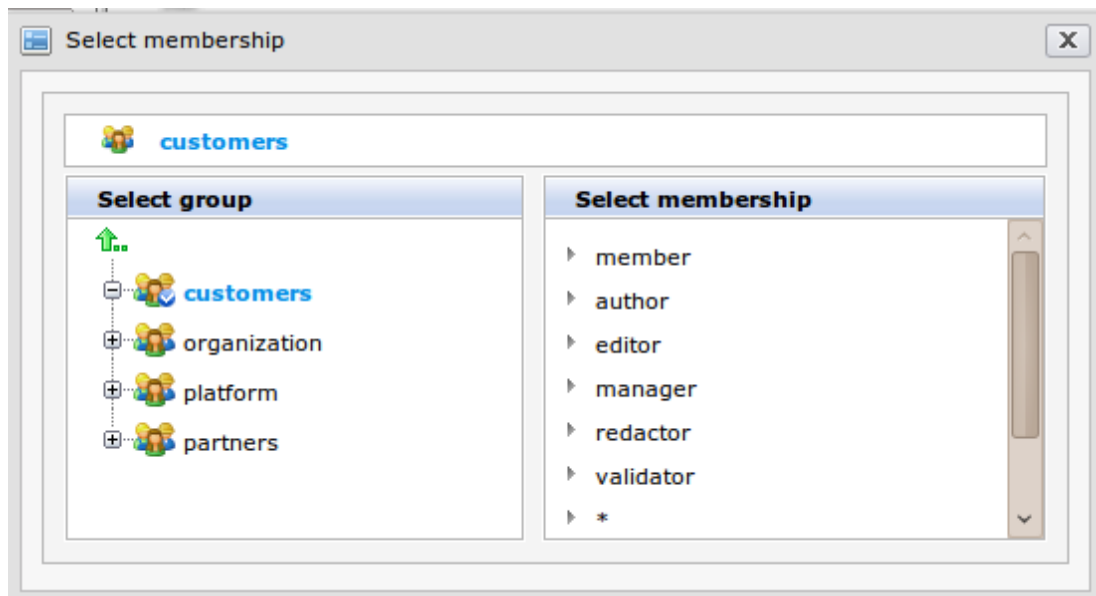
Step 4: Enter the statement for query. The name of node type must be unique.

Step 5: Check or uncheck the 'Enable cache results' option. If you tick this checkbox, for the first time you use this query to search, the result will be cached. For the second time you search using this query, it will show the cached results. After 45 minutes, the cache will be removed.

For example: you have the query Test with statement: `//element (*, nt:file)`. In the File Explorer, you have a nt:file document named File1. When you execute the query Test,

only document File1 will be shown. After that, create a nt:file document named File2 and execute query Test, only document File2 will be listed. After 45 minutes, the cache will be removed. When you execute the query Test, the document File1 and File2 will be listed.

Step 6: Select permissions for a group that can use this query by clicking  :



Step 7: Click **Save** to finish adding a new query.

4.5.1.2 Edit a query

Do as follows:


Step 1: Click the  icon corresponding to the query you want to edit. The **Edit query** form will appear:



Illustration 175: The Edit query form

Step 2: Edit the properties of the selected query.


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



- You can not edit the query name.
- You can change the query name.
- You can edit the statement.
- You can check/uncheck in 'Enable cache results'.
- You can change permissions.

4.5.1.3 Delete a query

Do as follows:

Step 1: Click  corresponding to the query you want to delete. A confirmation message will appear.

Step 2: Click **OK** to accept deleting this query, or **Cancel** to discard this action.

4.5.2 Manage Scripts

The function allows users to manage all script codes in the **WCM** and Browser Content system.

Go to **Sites Administration | Advanced Configuration | Manage Scripts**.

Manage Scripts

▼ ECM Scripts ▶ BC Scripts

Select category: **action**

Name	Path	Base Version	Actions
AddMetadataScript.groovy	...ction/AddMetadataScript.gr		
AddTaxonomyActionScript.grc	...AddTaxonomyActionScript,i		
AutoVersioningScript.groovy	...on/AutoVersioningScript.grc		
EnableVersioningScript.groovy	.../EnableVersioningScript.gro		
GetMailScript.groovy	...er/action /GetMailScript.groovy		
ProcessRecordsScript.groovy	...on/ProcessRecordsScript.gr		
PublishingRequestScript.groov	...PublishingRequestScript.grc		
RSSScript.groovy	...plorer/action /RSSScript.groovy		
SendMailScript.groovy	...r/action /SendMailScript.groovy		
TransformBinaryChildrenToTe:	...aryChildrenToTextScript.gr		

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Add

Illustration 176: Manage Scripts

Details:

- **WCM Scripts:** scripts are used in **WCM**.
- **BC Scripts:** scripts are used in Content Browser.

■ ECM Scripts tab

- ✓ To add a new script in **ECM**, do as follows:

Step 1: Select **ECM Scripts** tab in the **Manage Script**.

Step 2: Click the **Add** button to open the **Add/Edit script** form:

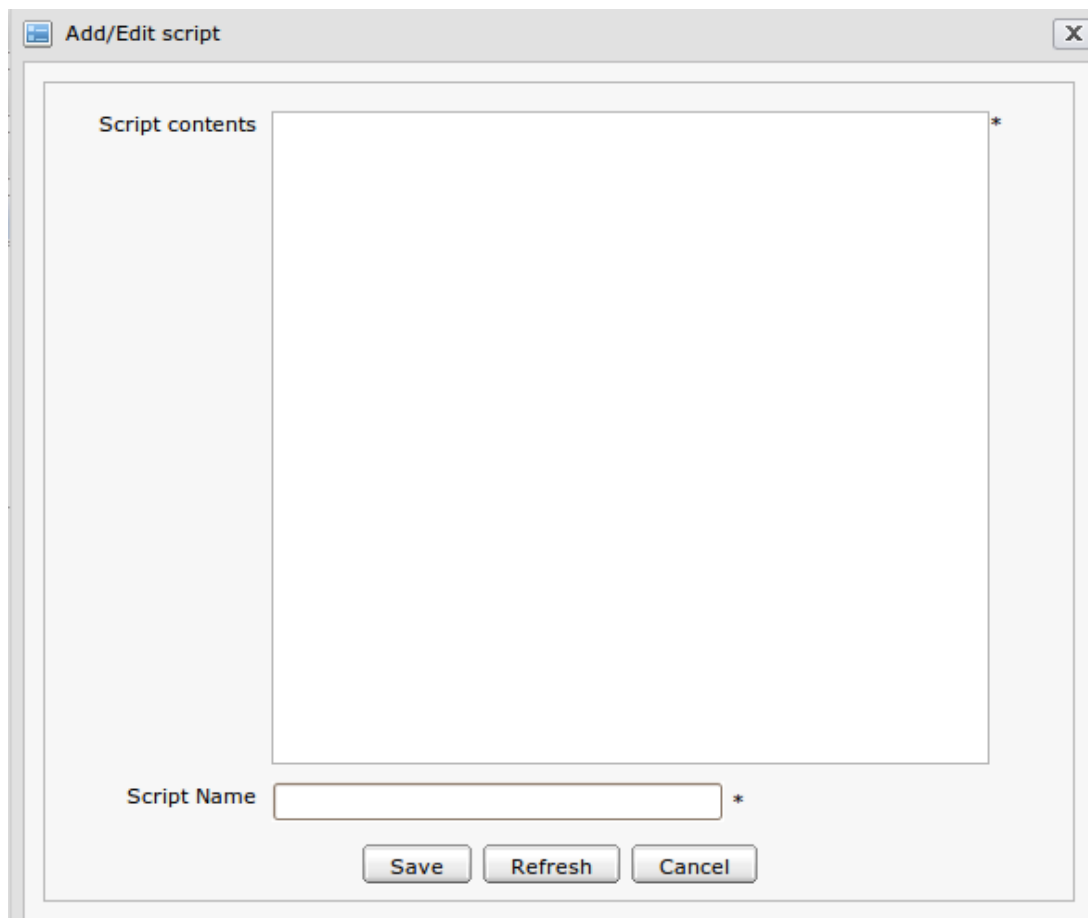


Illustration 177: The Add/Edit script form

(*):required


Step 3: Enter a value for the **Script content** field.

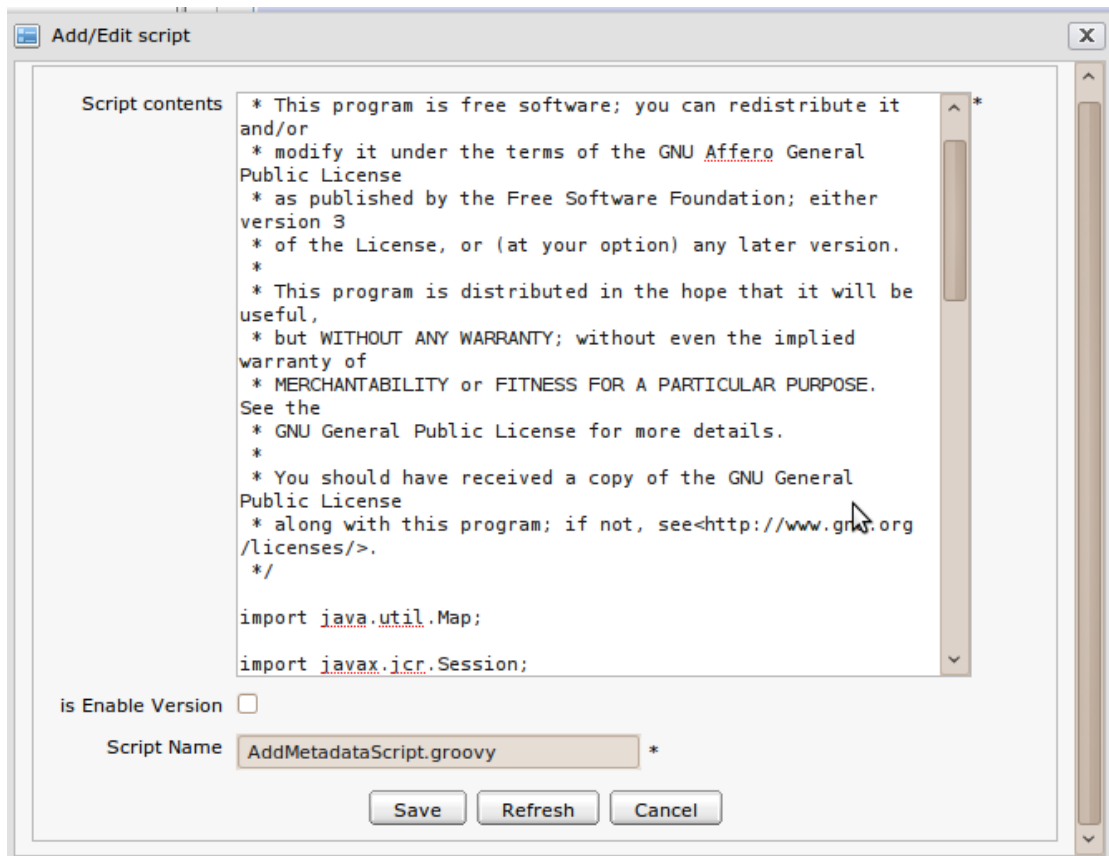
Step 4: Enter a script name for the **Script Name** field.

- The script name must be unique.
- The name must not contain special characters such as !, @, #, \$, %, &, *, (,).

Step 5: Click **Save** to accept adding the new script.

✓ To edit an ECM script, do as follows:

Step 1: In the **ECM Scripts** tab, click the  icon that corresponds to the script that you want to edit. The **Add/Edit script** form will appear:



Script contents

```
* This program is free software; you can redistribute it
and/or
* modify it under the terms of the GNU Affero General
Public License
* as published by the Free Software Foundation; either
version 3
* of the License, or (at your option) any later version.
*
* This program is distributed in the hope that it will be
useful,
* but WITHOUT ANY WARRANTY; without even the implied
warranty of
* MERCHANTABILITY or FITNESS FOR A PARTICULAR PURPOSE.
See the
* GNU General Public License for more details.
*
* You should have received a copy of the GNU General
Public License
* along with this program; if not, see<http://www.gnu.org
/licenses/>.
*/

import java.util.Map;
import javax.jcr.Session;
```

is Enable Version ☐

Script Name

Save Refresh Cancel

Step 2: Edit the properties in this form.


Step 3: Click the **Save** to save all changes.



You can not edit the script name.

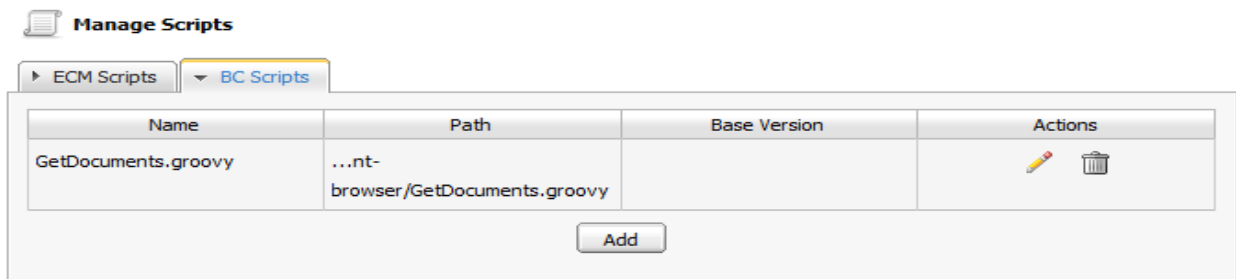
If you tick 'is Enable Version' checkbox, this script will automatically increase to 1 version after you have clicked **Save**. It is displayed at the 'Base version' column in the **ECM Scripts** tab.

- ✓ To delete an ECM script, do as follows:



Step 1: In the **ECM Scripts** tab, click  on the script that you want to delete. A confirmation message will appear.

Step 2: Click **OK** to accept deleting this action, or **Cancel** to discard this action.

The BC Scripts tab:



The **Manage Scripts** window shows two tabs: **ECM Scripts** and **BC Scripts**. The **BC Scripts** tab is active, displaying a table with the following data:

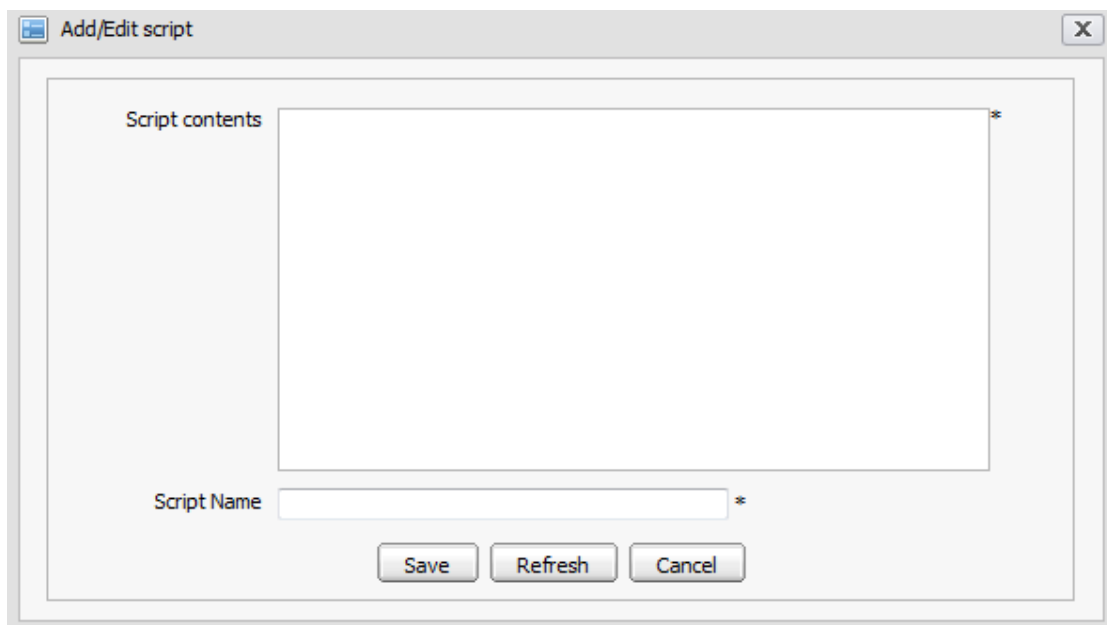
Name	Path	Base Version	Actions
GetDocuments.groovy	...nt-browser/GetDocuments.groovy		 

Below the table is an **Add** button.

- ✓ To add a BC script, do as follows:

Step 1: In the **Manage Scripts**, select the **BC Scripts** tab.

Step 2: Click the **Add** button to open the **Add/Edit script** form:



The **Add/Edit script** form contains the following fields and buttons:

- Script contents**: A large text area for entering the script content, marked with an asterisk (*) indicating it is required.
- Script Name**: A text input field, also marked with an asterisk (*) indicating it is required.
- Buttons**: **Save**, **Refresh**, and **Cancel**.

(*): required

Step 3: Input script content for the **Script content** field.

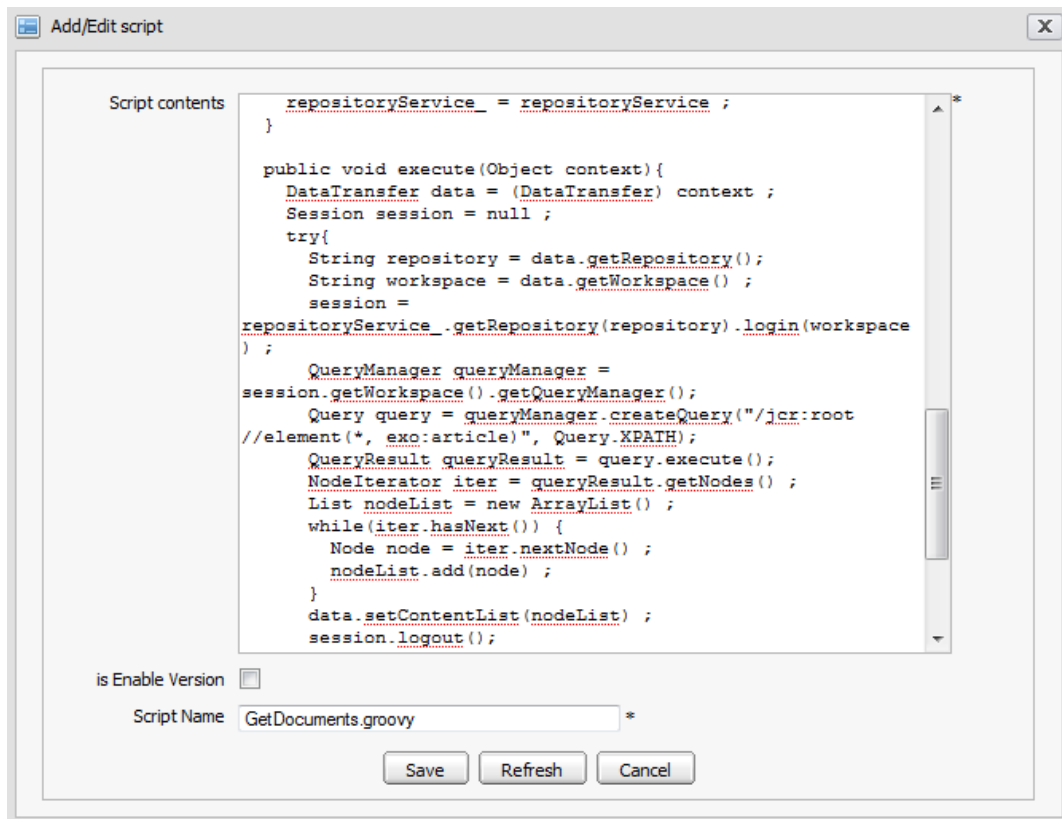
Step 4: Input a script name for the **Name** field.

Step 5: Click **Save** to finish adding the new script.

- ✓ To edit a BC script, do as follows:

Step 1: In the **BC Script** tab, click  on a script that you want to edit.

The **Add/Edit script** form will appear:



Step 2: Edit the properties that you want.


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



You can not edit the script name.

If you tick the 'is **Enable Version**' checkbox, this script will automatically increase to 1 version after you have clicked **Save**. It is displayed at the '**Base version**' column in the **WCM Scripts** tab.

- ✓ To delete a BC script, do as follows:

Step 1: In the **BC Scripts** tab, click  on the script that you want to delete. A confirmation message appears.

Step 2: Click **OK** to accept deleting this script, or **Cancel** to discard this action.

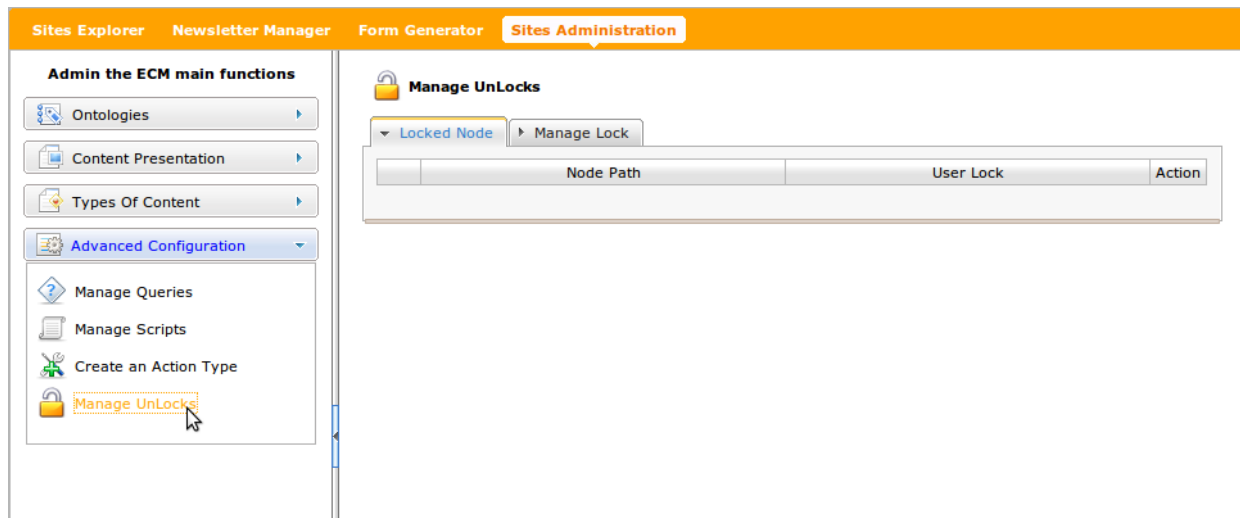
4.5.3 Manage Unlocks


All locked nodes are listed and managed by administrators in the **WCM Administration**. There are two ways that help administrators unlock nodes: unlock nodes in the right-click menu in Site Explorer or unlock nodes in the **WCM Administration**.

Step 1: Go to **Sites Administration** on the navigation bar.


Step 2: Select **Advanced Configuration | Manage Unlocks** on the **Admin the WCM**

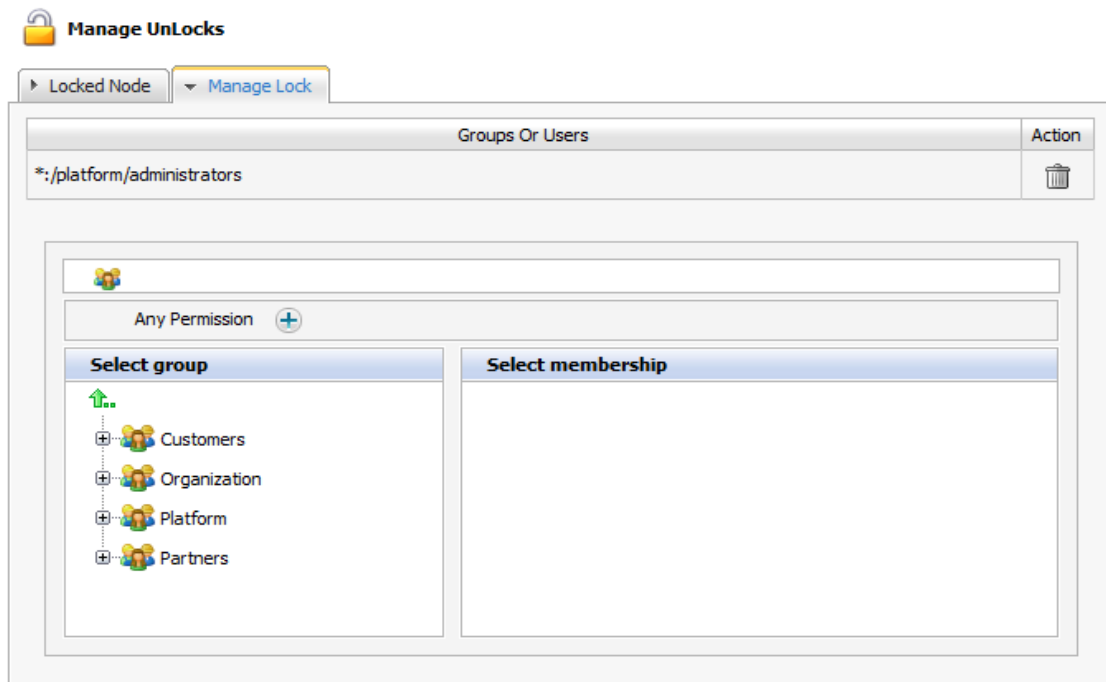
main functions panel on the left. The locked nodes will be listed on the right panel.




Step 3: In the **Locked Node** tab on the right panel, administrators can unlock nodes by clicking  that corresponds to nodes which need to be unlocked. The unlocked nodes will disappear from the locked node list.

Administrators can manage and add the unlock permission for another groups and users in the **Manage Lock** tab.

Step 4: Select the group on the **Select group** panel and the corresponding membership on the **Select membership** panel. The selected group will be listed in the **Group and Users** column. However, administrators can also click the  icon if they want to allow any users to unlock nodes.




Step 5: In case administrators want to remove the unlock permission of groups, click the  that corresponds to the group in order to remove them from the Unlock permission list except the group ***:/platform/administrator** and **root**.

4.5.4 Create an Action Type

The function allows managing all action nodes in the **WCM** system.

- **Step 1:** Go to the **WCM Administration** on the navigation bar.
- **Step 2:** Select **Advanced Configuration | Create an Action Type**.

 **Create an Action Type**

Name	Extends Action Type
exo:action	[nt:base]
exo:addMetadataAction	[exo:action] [exo:scriptAction] [nt:base]
exo:autoVersioning	[exo:action] [exo:scriptAction] [nt:base]
exo:createRSSFeedAction	[exo:action] [exo:scriptAction] [nt:base]
exo:enableVersioning	[exo:action] [exo:scriptAction] [nt:base]
exo:folksonomyAction	[exo:action] [exo:scriptAction] [nt:base]
exo:getMailAction	[exo:action] [exo:scriptAction] [nt:base]
exo:processRecordAction	[exo:action] [exo:scriptAction] [nt:base]
exo:sendMailAction	[exo:action] [exo:scriptAction] [nt:base]
exo:taxonomyAction	[exo:action] [exo:scriptAction] [nt:base]

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Add

Illustration 178: Create an Action Type

Step 3: Click the **Add** button to open the **Action Type Form** form:



Action Type Form [X]

Extends Action Type:

Name (starts with "exo:"): *

is Action Move: ☐

Execute:

Variables:  

Save **Cancel**

Illustration 179: The Action Type Form form

Step 4: Select the action type.

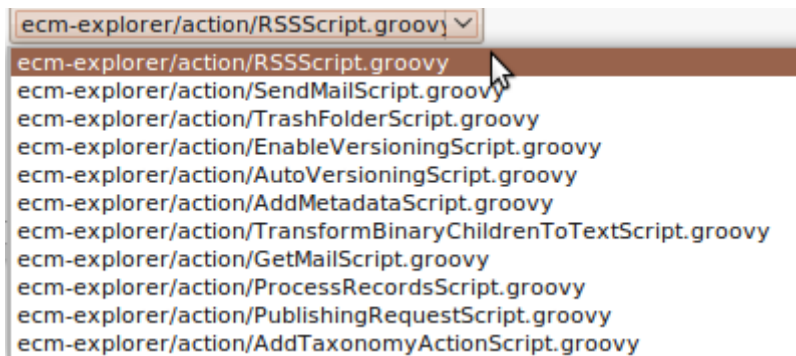
Step 5: Input a name for the action.





- The name must be started with *exo*.
- The name must be unique.
- The name must not contain special characters like *!,@,#,\$,%,&,*,(.)*.

Step 6: Check/uncheck the "is Action Move" option: the action will has *exo:move* property or not.

Step 7: Select an execute for the **Execute** field.



Step 8: The **Variables** field: allows creating multi-values for action. If you want to add more values for action, click  . Click  to delete a value.

Step 9: Click **Save** to accept adding a new action type.

5 Next Steps

This user manual has provided a thorough explanation of features and terminologies within eXo Content. Now that you know how to create, manage and publish web content and administer a website based on eXo Content, you may have more questions or want to get involved in the eXo community. The following links can connect you with resources to learn more and contribute to the open source development process.

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