



eXo Content User Guide

Version 2.1.1

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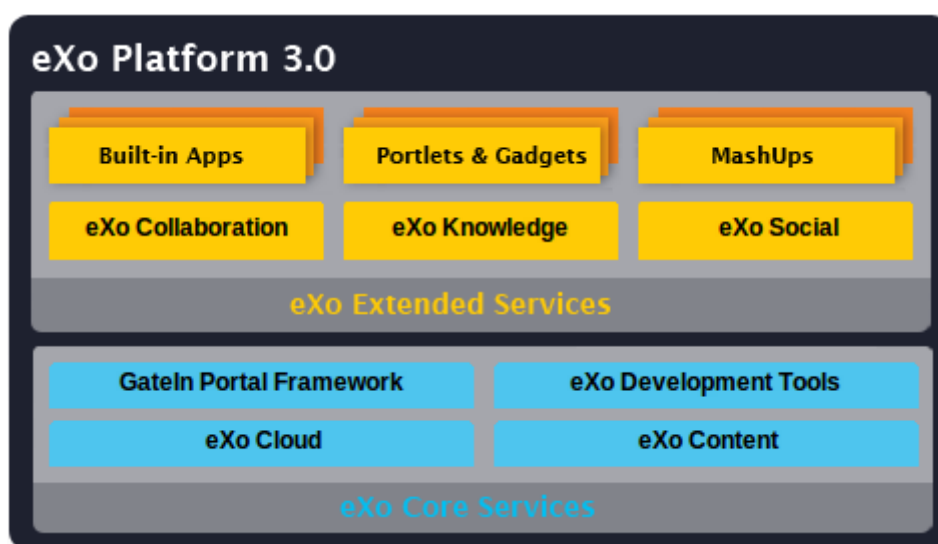
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1 Preface

1.1 Overview

Beginning as an Open Source project in the year 2002, eXo is well-known as the industry's first Java portlet container. With the aim of dominating the potential portal market through robust and easy-to-use applications, eXo Project has succeeded in attracting consumers in the whole world. Exo has 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 that corporates 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. eXo Extended Services are also a part of the eXo Platform 3.0, running on the 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 System (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 to maintain, control, modify and reassemble the content of a web-page easily and effectively. All components of your website can be organized, reconstructed easily, which helps you keep your website under the 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 existing 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 user guide are users using eXo Content. This guide 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.

In this guide, we will use the following accounts (username/ password) throughout the guide:

- root/ gtn: This account is for users as Administrators who have the highest right on the platform.
- mary/ gtn: This account is for a publisher who can write contents but also can create new pages or edit them in the current site.

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 Introduction

2.1 exo Content

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.

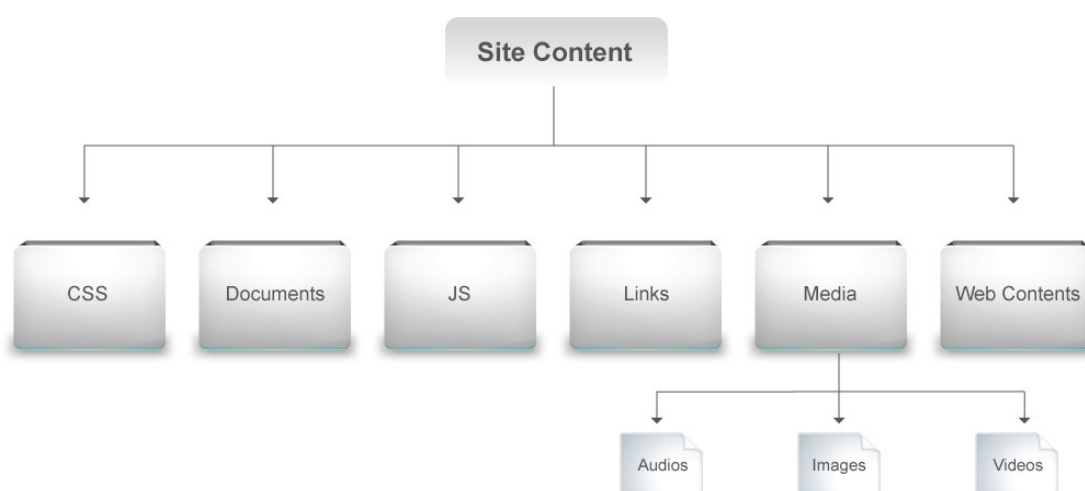
The **WCM** users can manage both structured and unstructured content, so that an organization, such as a business or governmental agency, can more effectively meet business goals (increase the profits or improve the organizational process efficient use of budgets), serve its customers (as a competitive 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. Web Content

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

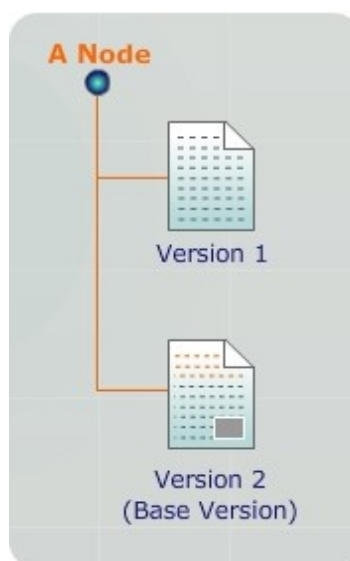
A node is an abstract basic unit used to build linked data structures, such as linked lists and trees, and computer-based representation of graphs. Nodes contain data and/or links to other nodes. Links between nodes are often implemented by pointers or references.

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 mixin: 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 Get Started

3.1 Account

3.1.1 Register account

To register a new account on the portal, do 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:

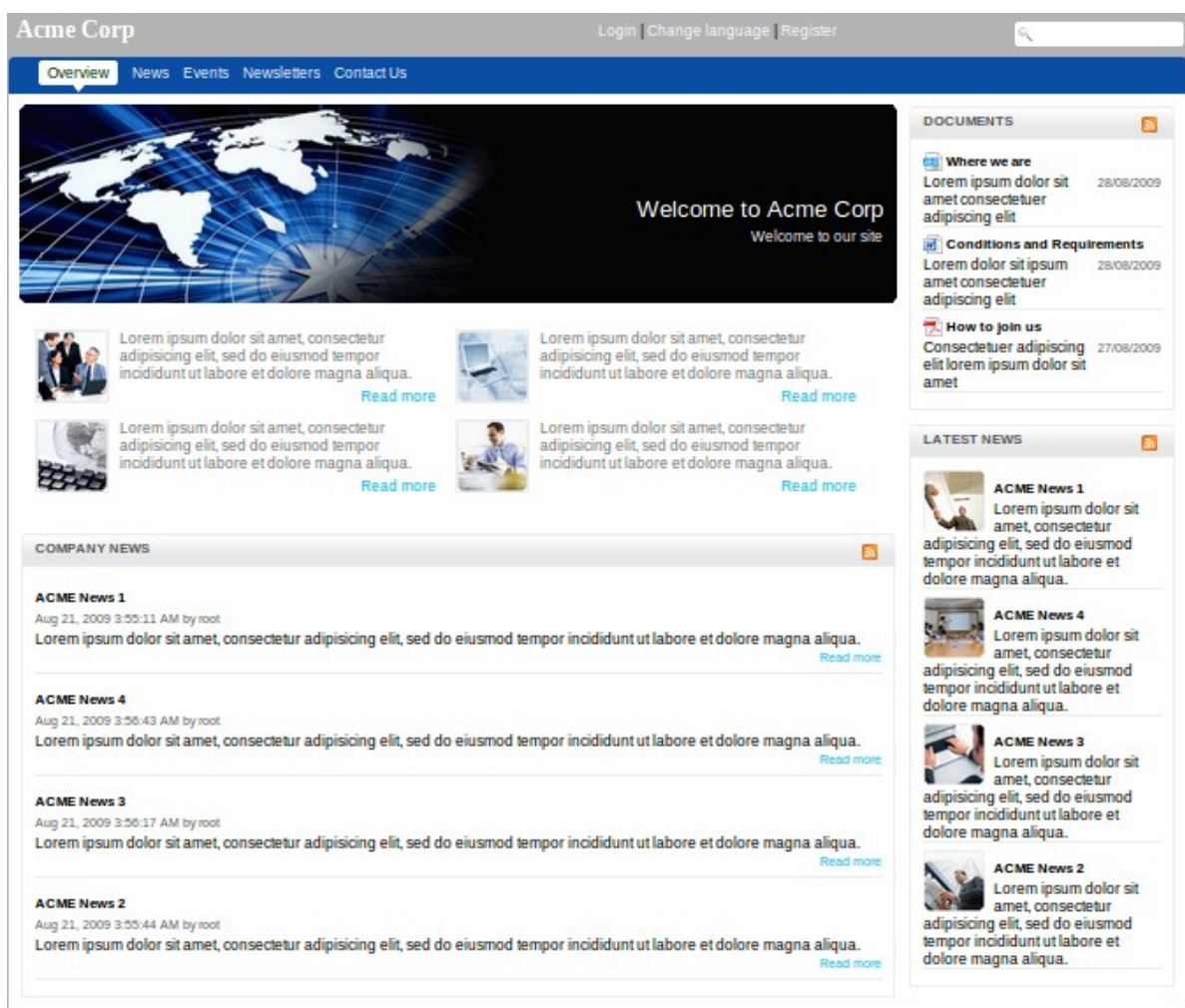
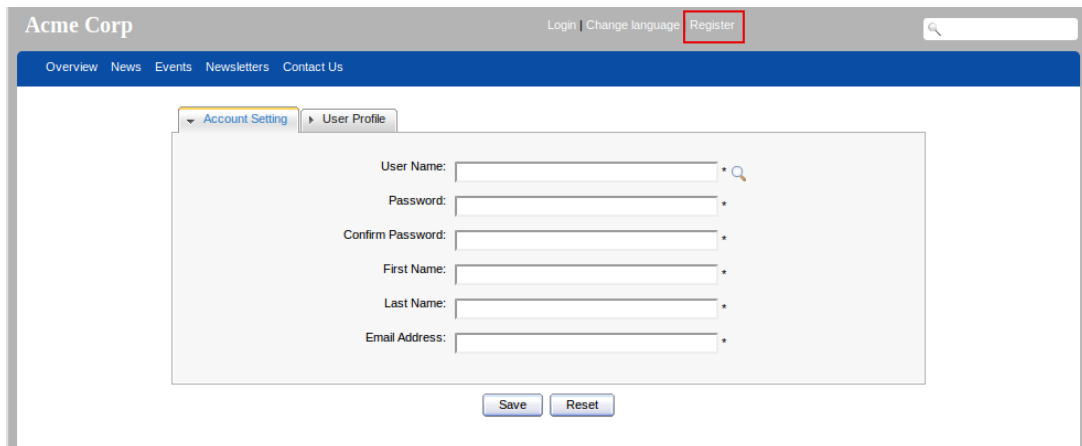


Illustration 1: The ACME site in the public mode

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




(*) means that the fields are required to fill in.

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 a right format: username@abc.com |

Step 3: Input values for the fields in this form.

Step 4: Click the  icon to search and check if the inputted user name is available or not.

Step 5: Input values in the fields of **User Profile** tab, including: Profile information, Home information and Business information.

Account Setting User Profile

Given Name:

Family Name:

Nick Name:

Birthday:

Gender: Male ▼

Employer:

Department:

Job Title:

Language: English ▼

Personal Info

Profile

Home Info

Business Info

Save Reset

Step 6: Click **Save** to register a new account, or **Reset** to renew all inputted values. There will be an alert message, and you cannot add a new account successfully if at least one of these cases occurs:

- **User name** is existing or invalid.
- **Password** has less than 6 characters.
- **Password** and **Confirm Password** are not the same.
- **Email Address** has 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 use name or password, you can recover it by using this email address.

3.1.2 Sign in

This function enables 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:

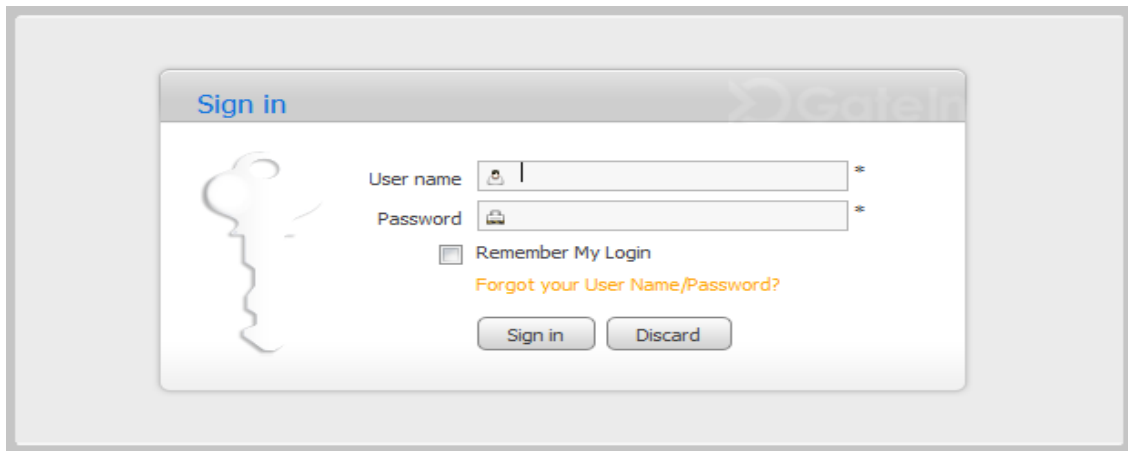


Illustration 2: The Sign in form

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

Step 4: Click **Sign in** to accept, or **Discard** to exit from 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 user name or password when you forget. |
| Sign in | To sign into the eXo Portal with the inputted user name and password. |
| Discard | To close the Sign In form without any changes. |

if 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 checking mode.

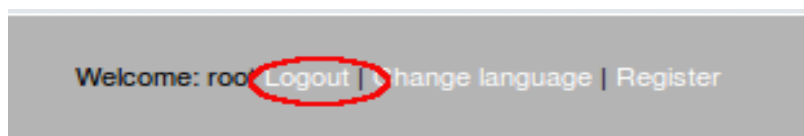
To login again, enter **User Name** and **Password** again.

After signing in, you will be redirected to the authenticated homepage like the illustration.

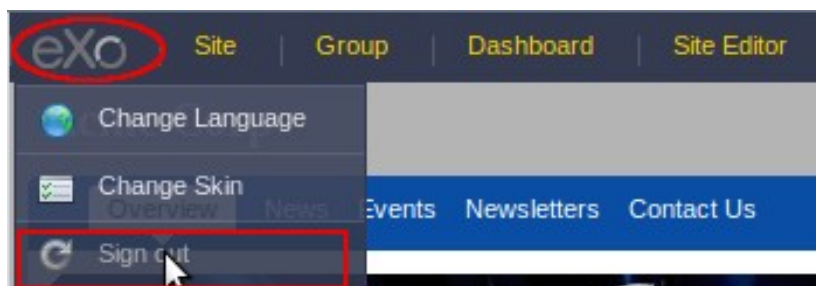
3.1.3 Sign out

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 eXo | **Sign out** from the menu:



3.1.4 Retrieve user name/password

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

Step 1: Click the link **Forgot your User Name/Password?** in 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.

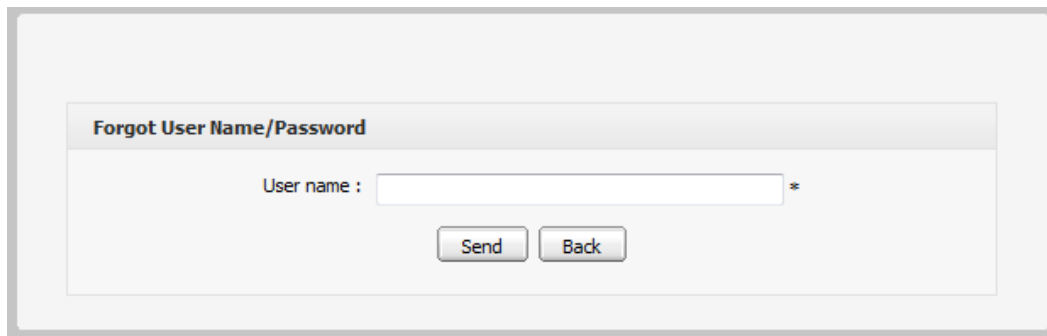
1. Recover your password: enter **your username** then click send.
2. Recover your username: enter **your email address** then click send.

☒ Forgot my password
☐ Forgot my username

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

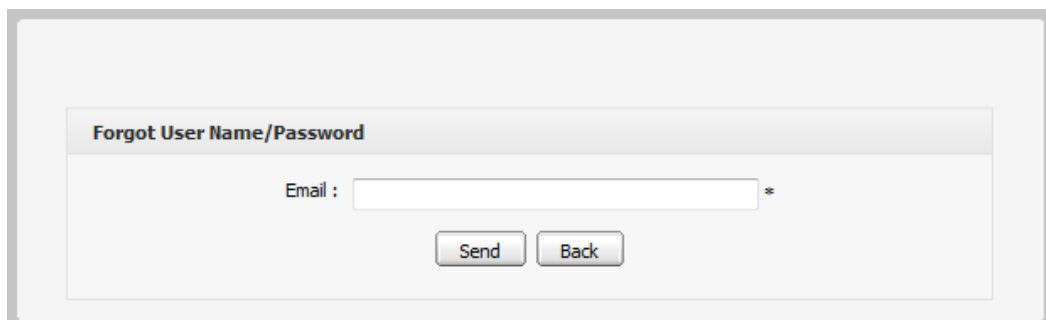
Step 2: Select one of these two options in this form. The selected option will be shown:

- If the Forgot my password option is selected, the form to recover the password appears:



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

- If the **Forgot my username** option is selected, the form to recover the user name appears:



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. To the right of the input field is 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.

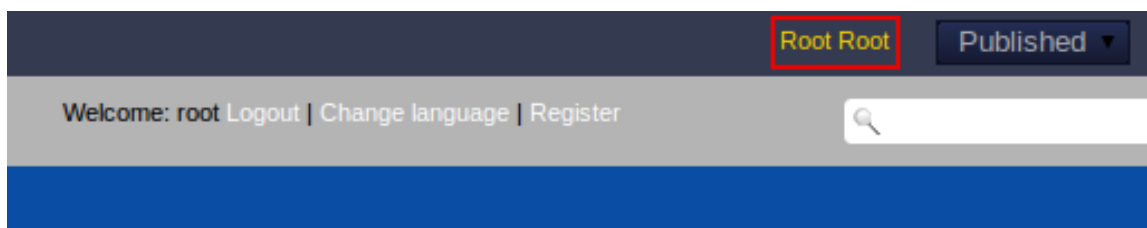
Once the information has been sent, you will receive an email with your User name/ Password in your email address that you registered.

- If you forget User Name: when a user name is retrieved, your old user name is restored and can be reused and a new password is also sent to your email with the old user name.
- If you forget the 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.

3.1.5 Change the account information

The function enables you change your account information, such as your profile and password.

- The first thing to do is to directly click your own account name.



- The **Account Profiles** tab will appear:

Illustration 3: The Account Profiles tab

- To change your account profiles, do as follows:
Step 1: Select the **Account Profiles** tab that displays your current basic information.
Step 2: Change your **First Name, Last Name and 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.

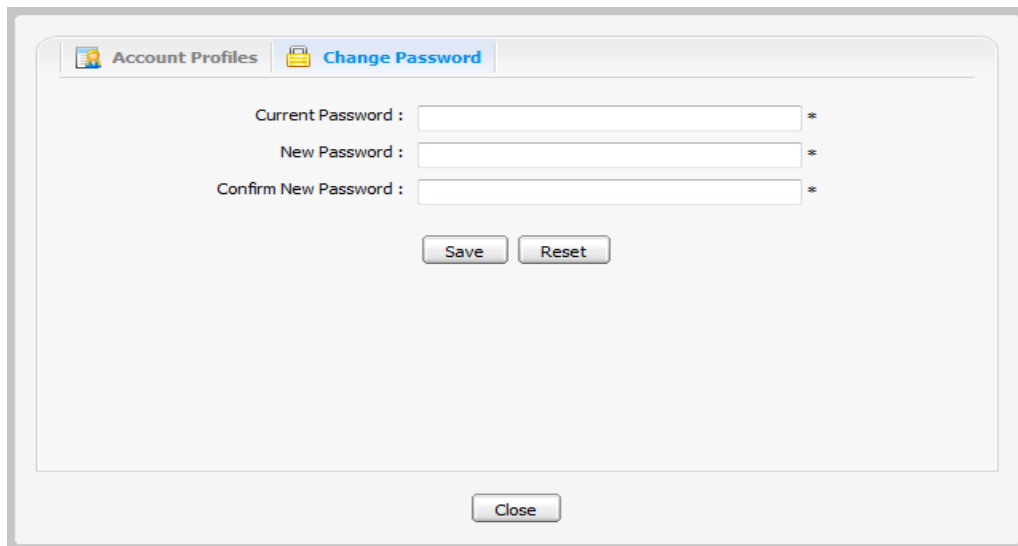


Illustration 4: The Password Changing form

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.

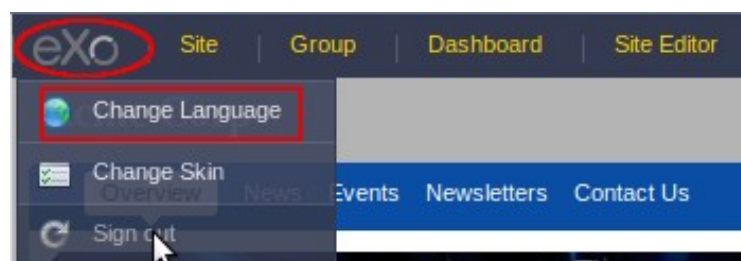
Step 5: Click **Save** to accept changes.

3.2 Change the display language

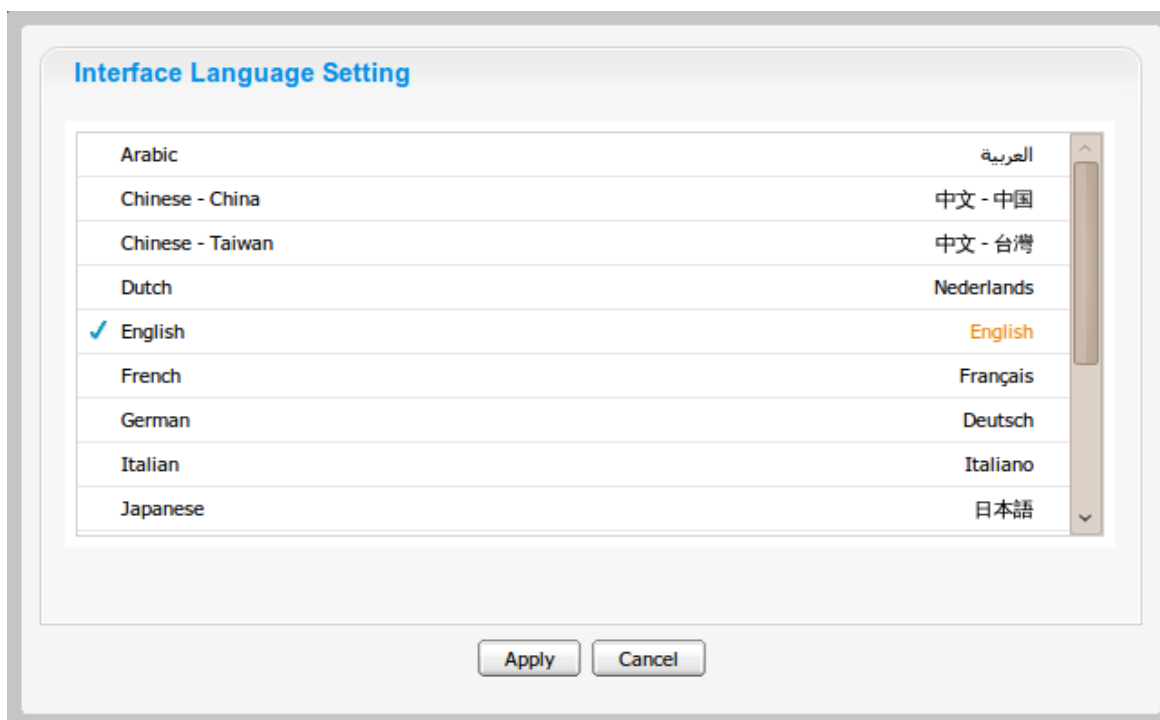
The priority order of display language is shown to the following order:

- 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.
- Do as follows to change the display language:

Step 1: Move the mouse on **eXo | Change Language** on the top left corner of the portal:



The **Interface Language Setting** form appears:



The dialog box titled "Interface Language Setting" contains a table of available languages. The "English" row is selected, indicated by a blue checkmark in the first column and the word "English" in orange in the second column. Other languages listed include Arabic, Chinese - China, Chinese - Taiwan, Dutch, French, German, Italian, and Japanese, each with its corresponding name in the second column. At the bottom of the dialog are "Apply" and "Cancel" buttons.

| Language | Native Name |
|------------------|-------------|
| 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 another language in the list. The selected language will be marked with the icon ✓.

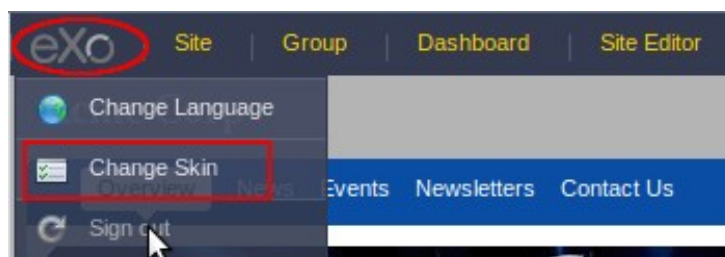
Step 3: Click **Apply** to change the display language temporarily, and wait few seconds to take effect, or click **Cancel** to quit without any changes.

3.3 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. To use the portal easily and effectively, you are allowed to change the skin of the current site.

Do as follows:

Step 1: Move the cursor to **eXo | Change Skin** item in the drop-down menu:



The **Skin Setting** form appears:

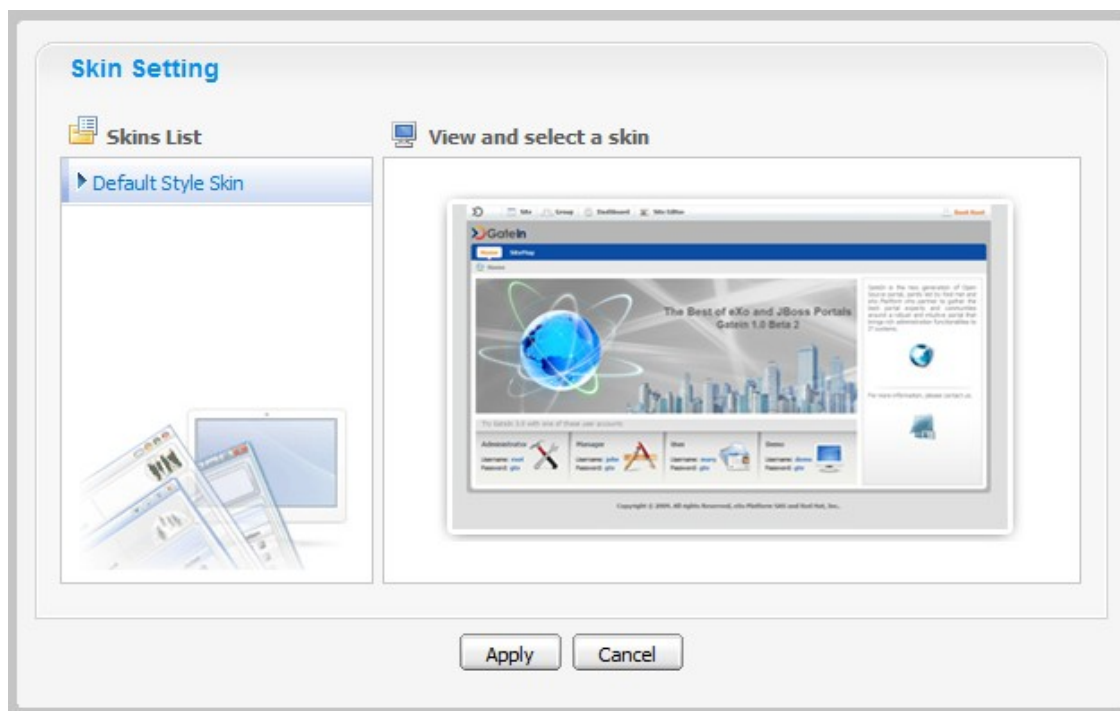


Illustration 5: The Skin Setting form

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

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

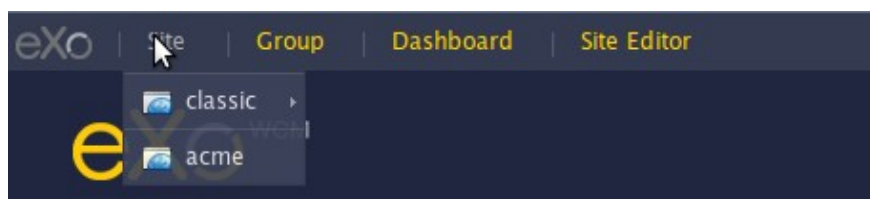
These actions can be done by users who have the right to use the administration bar with a personal preferences menu.

4 Basic Actions

These actions are for all registered users after they have logged in the accounts.

4.1 View a site

In **eXo Content**, we use the 'Website' term which is equivalent to the 'Portal' term. So, viewing a portal means viewing a website. You can select a 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:

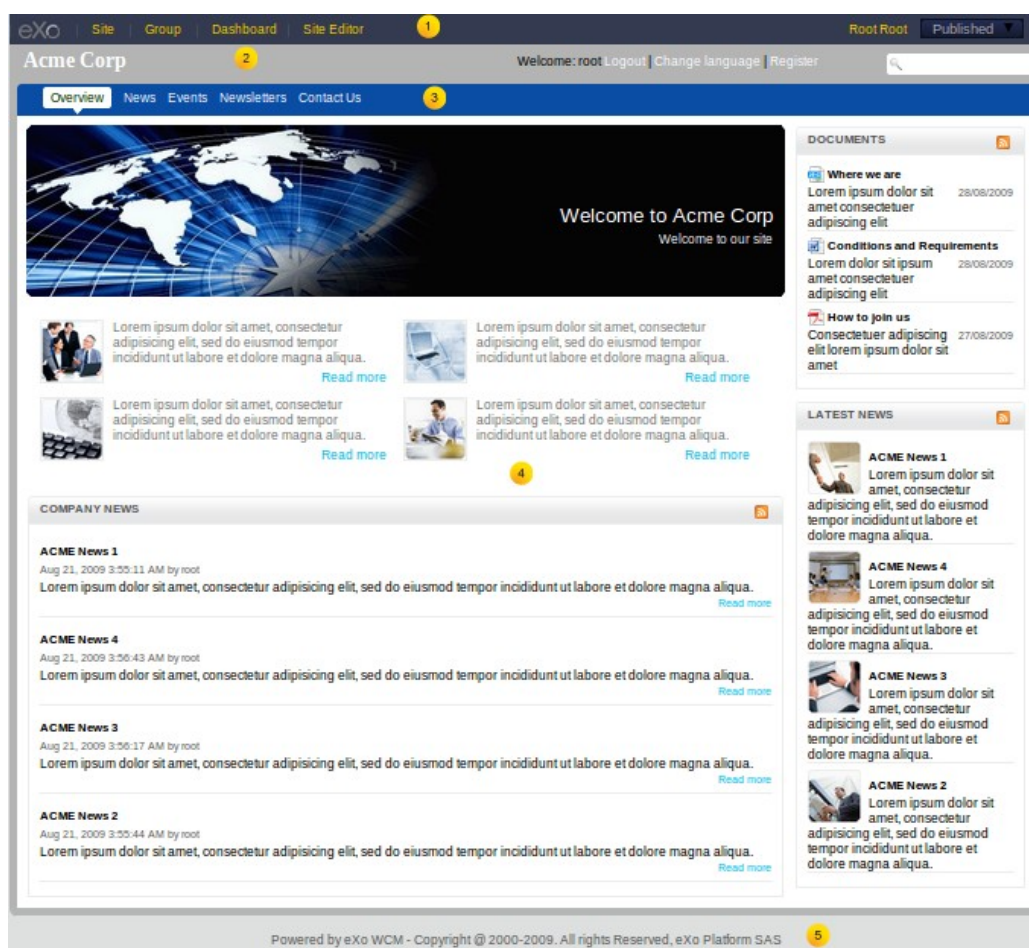


Illustration 6: The Interface of the Acme site

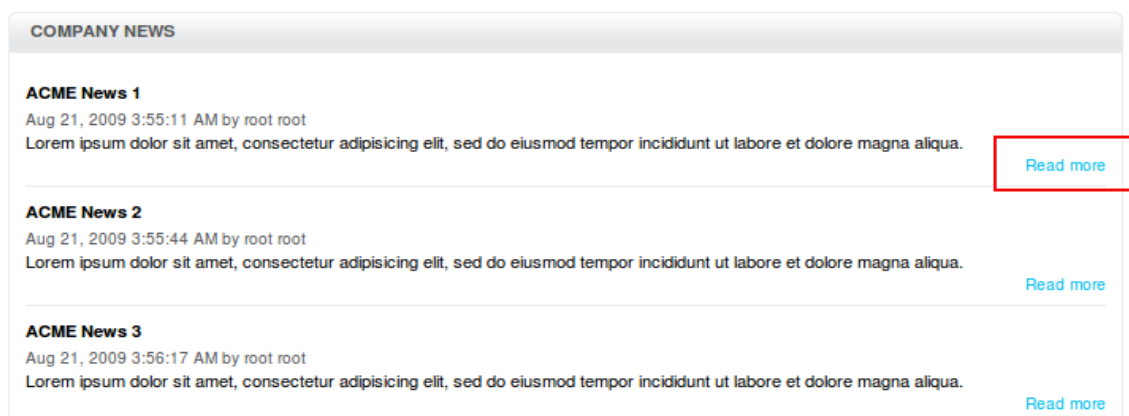
Detail:

| Indicator | Description |
|-----------|--|
| 1 | Administration bar contains administration functions related to portals (websites). |
| 2 | Banner contains slogan, logo, icon used in the website. |
| 3 | Navigation bar helps users to visualize the structure of the website and provide quick links to different pages. |
| 4 | Home page is the main page of the website. This is the default page that is displayed first when you visit the website. |
| 5 | Footer of the web site can be texts or images that is displayed at the bottom of the web site. It provides information about author/institutional sponsor, revision date, copyright and more. |

4.2 Print a web content

Users can easily print any content in a site by doing as follows:

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



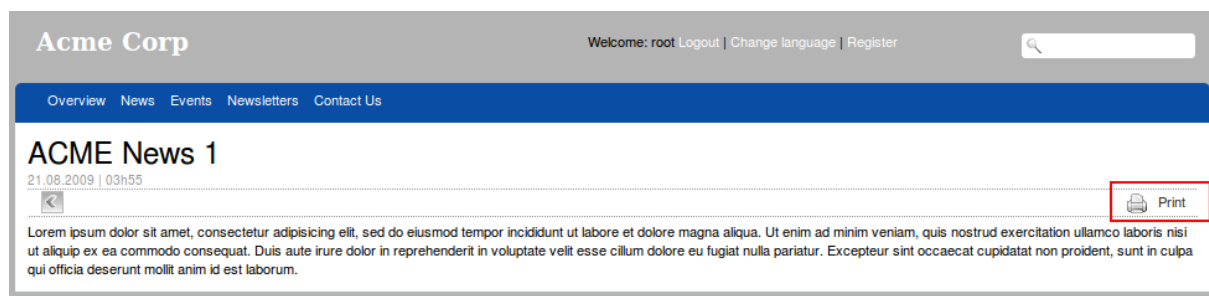
COMPANY NEWS

ACME News 1
Aug 21, 2009 3:55:11 AM by root root
Lorem ipsum dolor sit amet, consectetur adipisicing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. [Read more](#)

ACME News 2
Aug 21, 2009 3:55:44 AM by root root
Lorem ipsum dolor sit amet, consectetur adipisicing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. [Read more](#)

ACME News 3
Aug 21, 2009 3:56:17 AM by root root
Lorem ipsum dolor sit amet, consectetur adipisicing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. [Read more](#)

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.

4.3 Contribute content

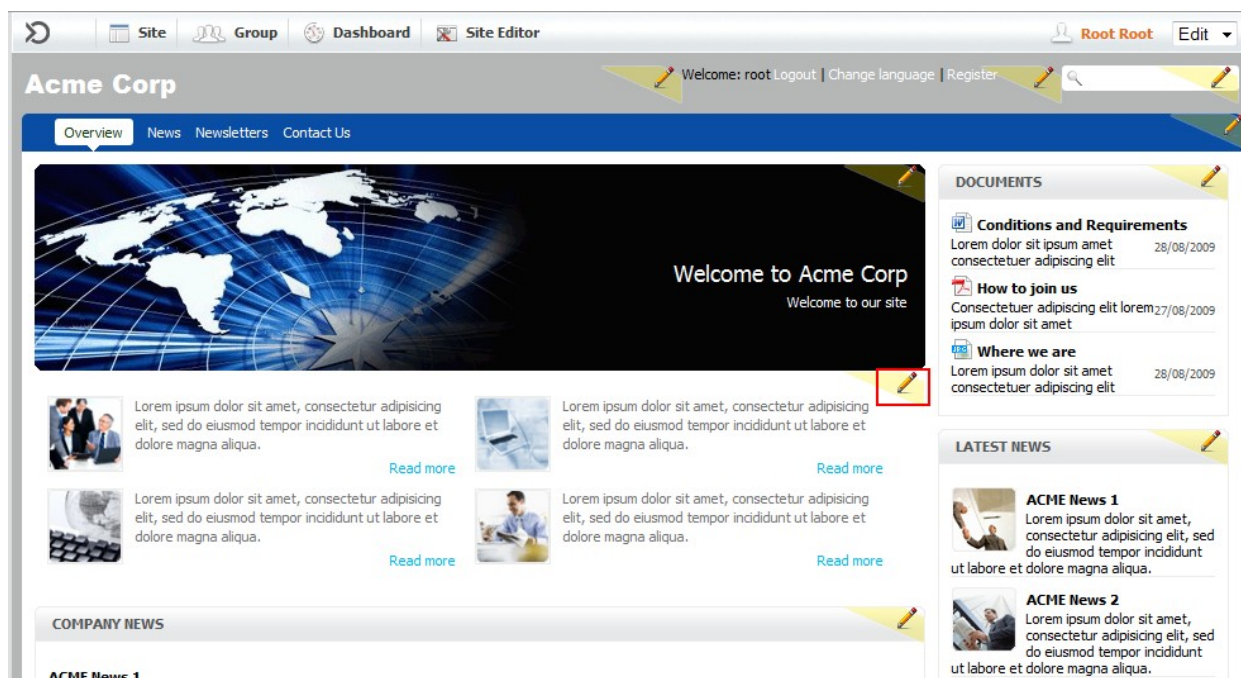
4.3.1 Incontext Editing

Besides publishing a web content in the 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 enables you to directly publish multiple content on the Overview page.

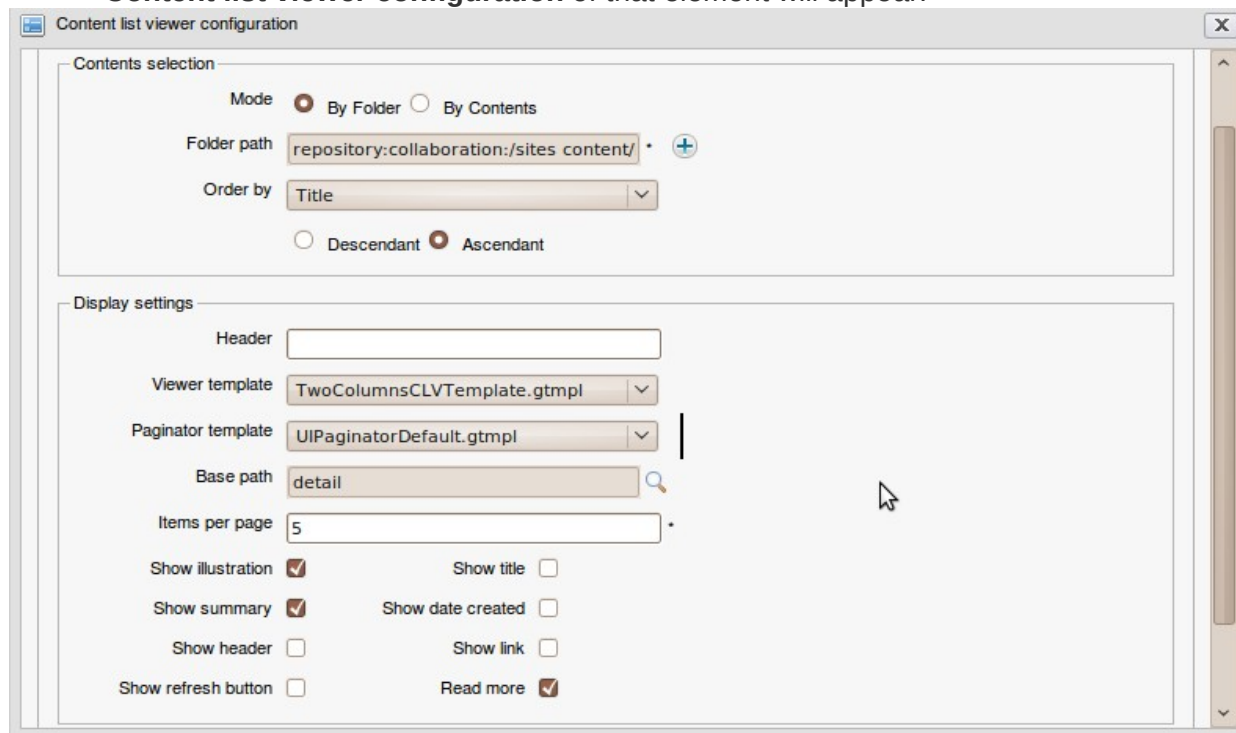
- ✓ To publish a site, do as follows:

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 7: 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.

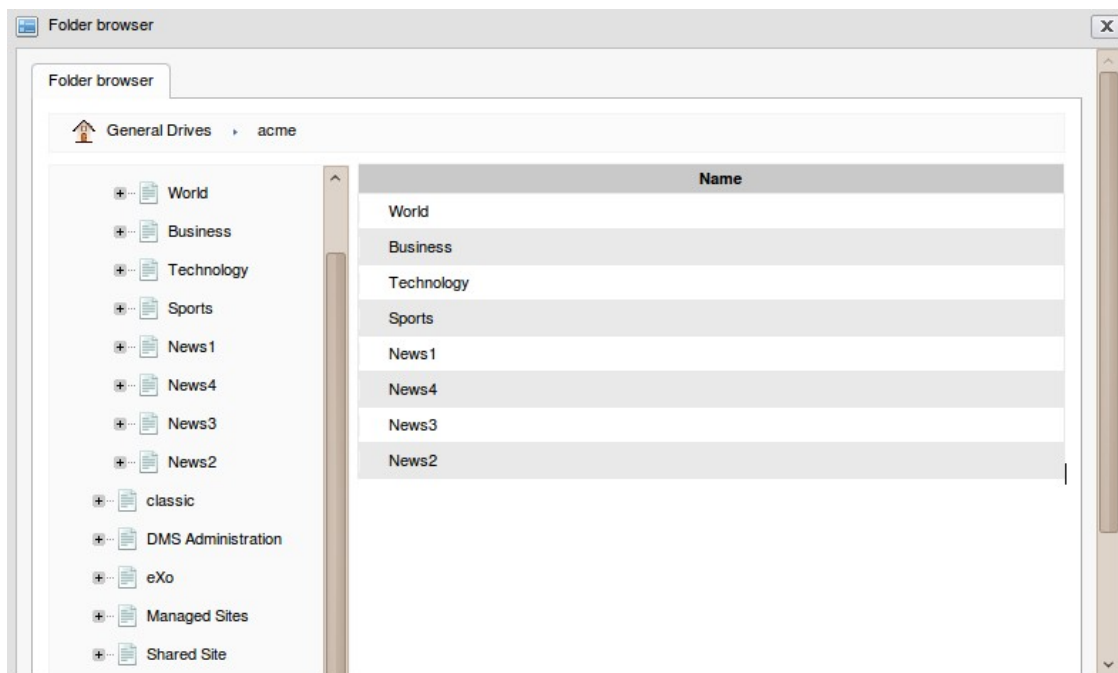
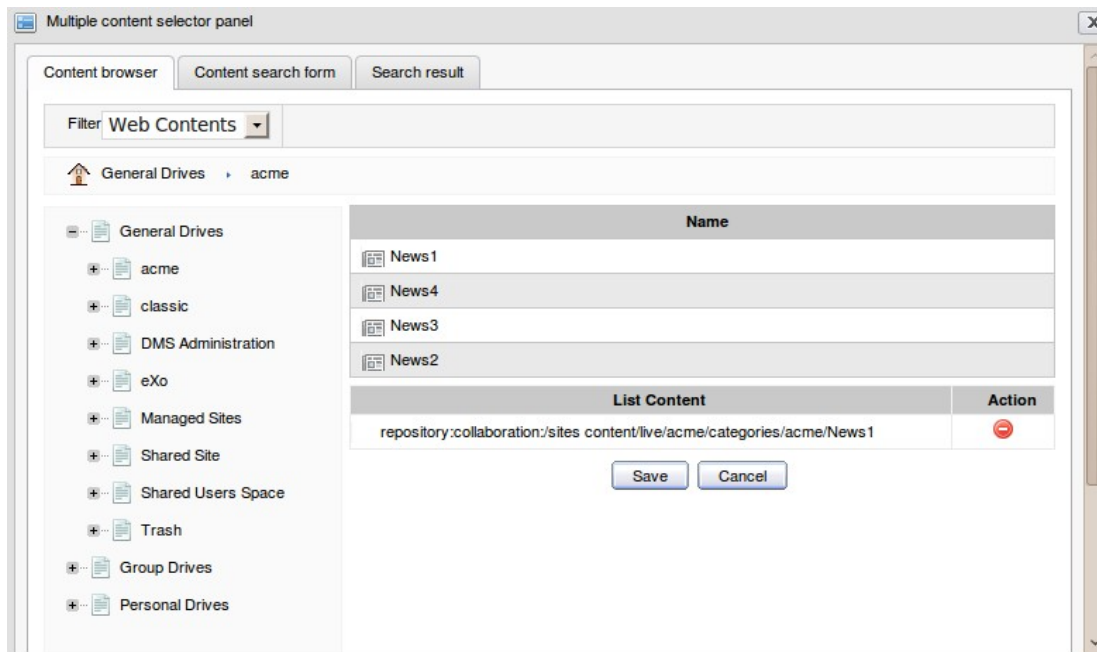


Illustration 8: The folder browser to view possible folders that can be selected

- 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.*

4.3.1.1 Add content

4.3.1.2 Edit Content

4.3.1.3 Manage content

4.3.1.4 Preferences

4.3.2 Publication Process

4.3.2.1 Request approval

4.3.2.2 Approve

4.3.2.3 Publish

4.4 Content inside Categories

4.4.1 What is a Category in eXo Content?

4.4.2 Create a Content

4.4.3 Organize Content

4.4.4 Pros and Cons

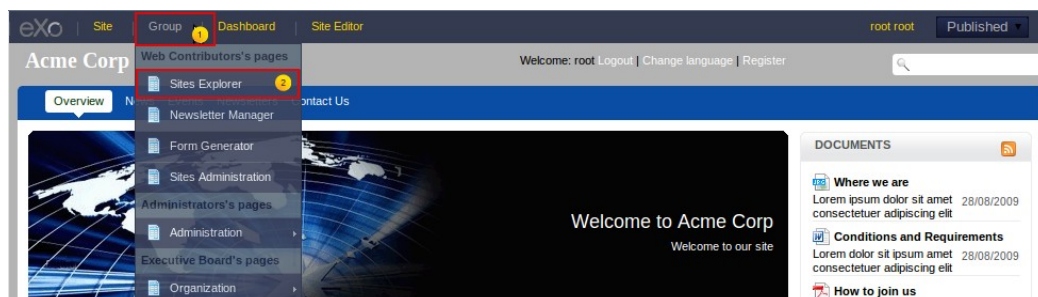
4.5 Dynamic Navigation in eXo Content

4.6 Sites Explorer

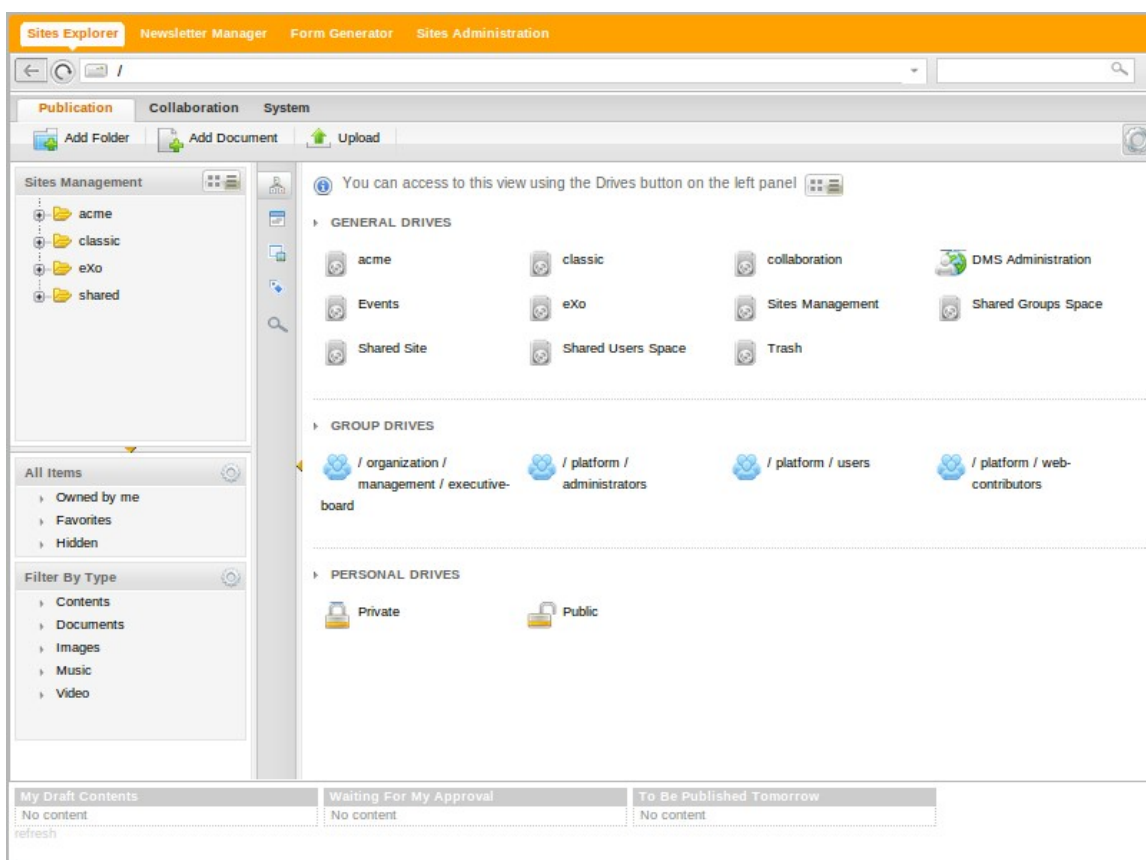
4.6.1 Access to Sites Explorer

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

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



A list of all drives in **Sites Explorer** displays:



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 store the private documents, select the Private drive that no one can access or get your private resources. If you want to create resource and share with others, you can 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 “john” 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**.

4.6.2 Drives

4.6.2.1 Private drive

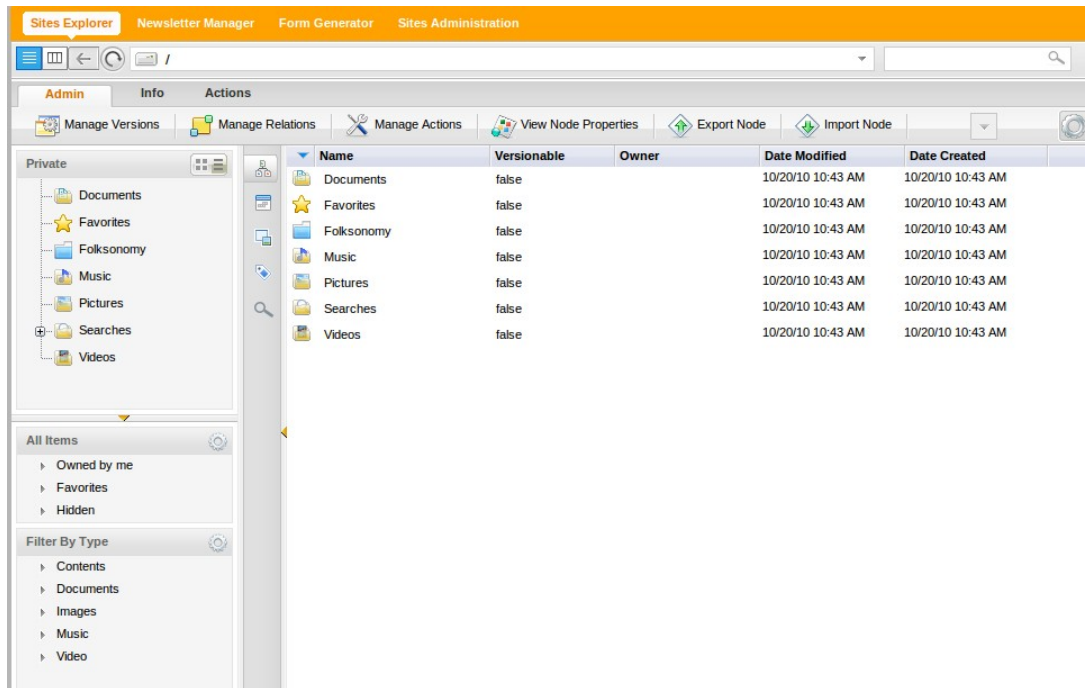
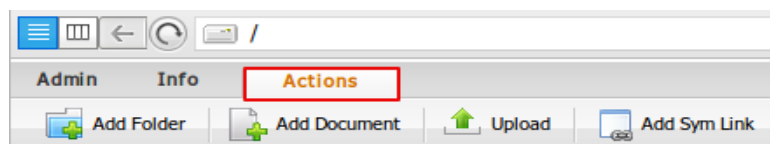


Illustration 9: The private drive

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

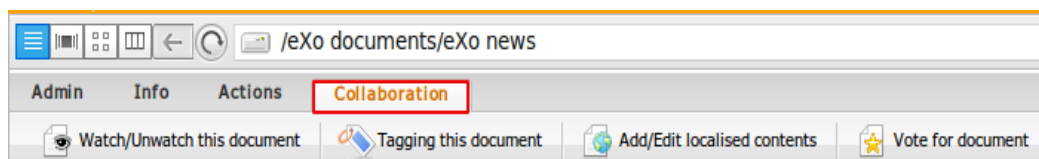
By default, there are some initialized folders to store the user's resources.

- ◆ 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.

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



1. Watch/Unwatch a document .
2. Add tags for a document.
3. Set multi-display languages for a 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 a document content.
 6. Download documents (folders) to your machine.

4.6.2.2 Public drive

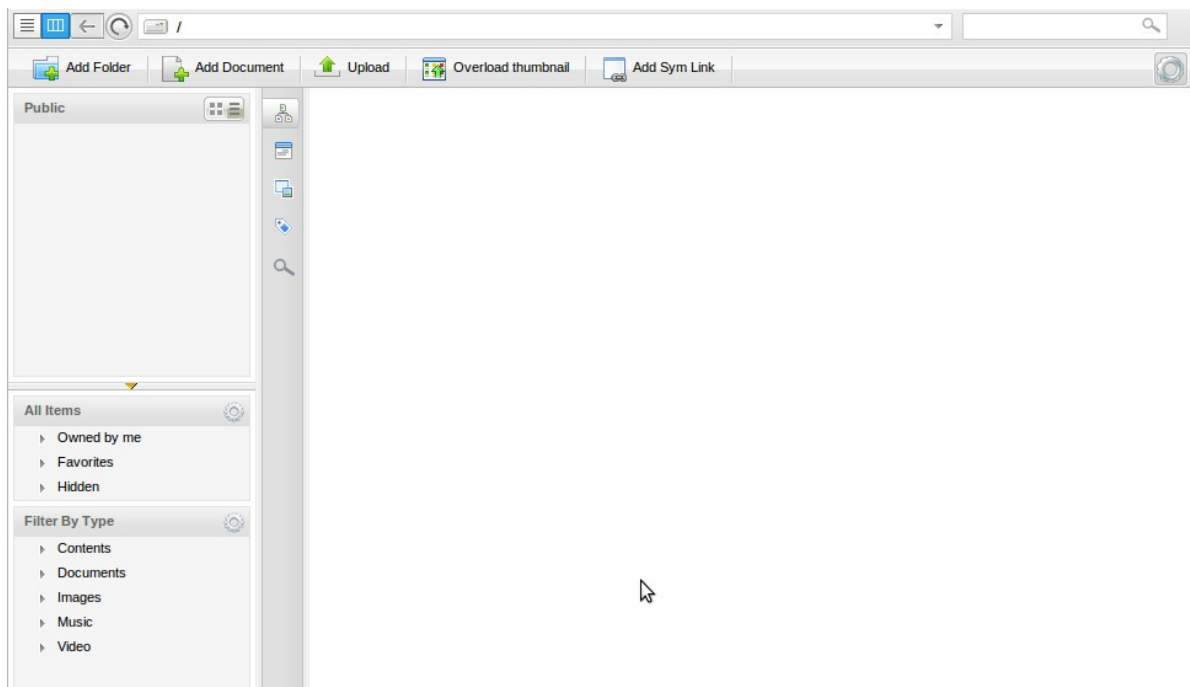


Illustration 10: The Public drive

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.

4.6.2.3 Drive of a specific group

By default, there are three 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.

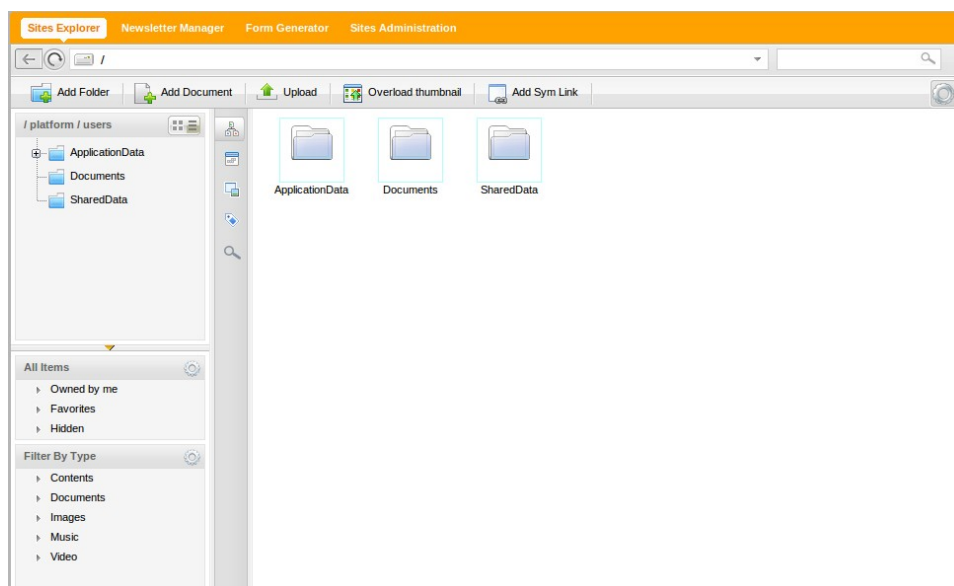


Illustration 11: Platform/User group

4.6.2.4 Shared Users Space drive

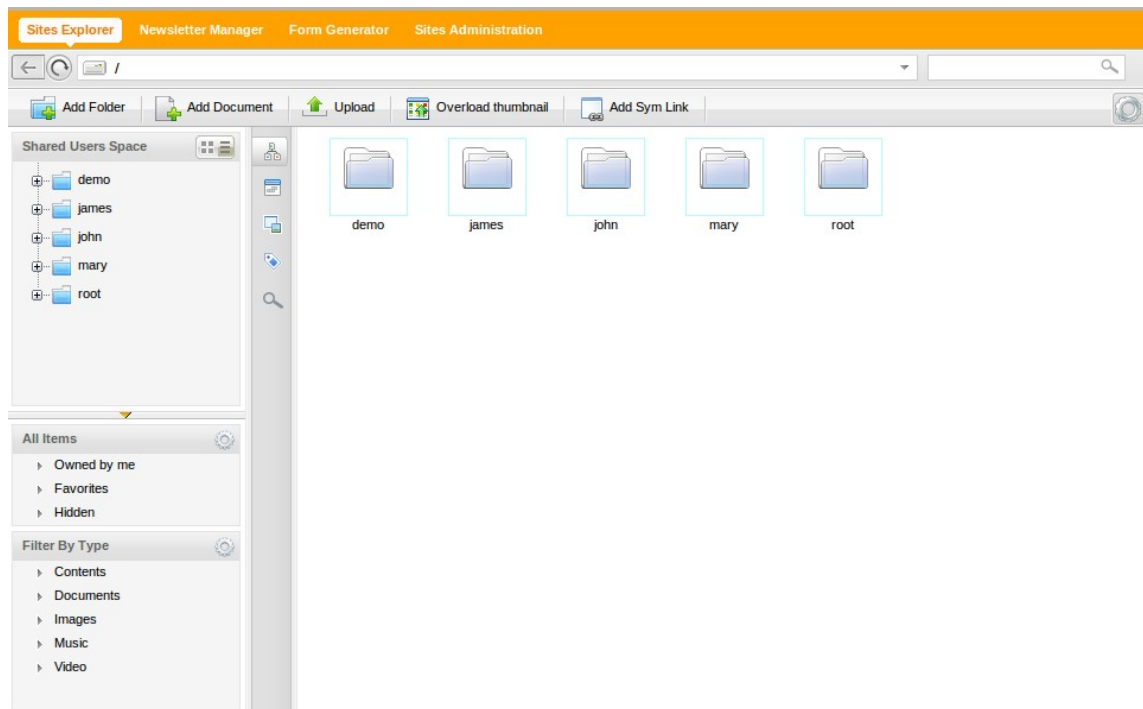


Illustration 12: The Shared Users Space drive

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 only can see 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.

4.6.2.5 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  to open the 'Preferences':

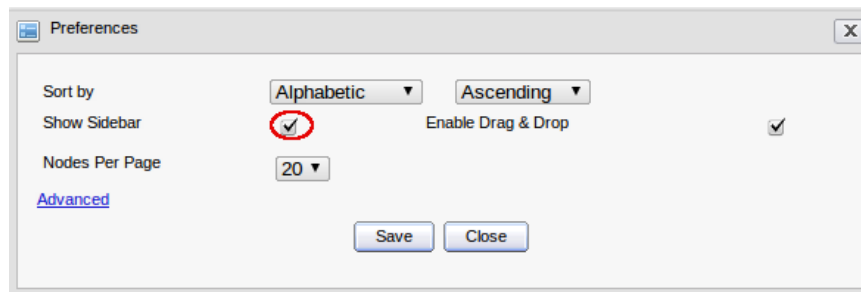


Illustration 13: The preference setting

Step 2: Unselect the **Show sidebar** check box | click **Save**. The drive will be displayed like the illustration below:

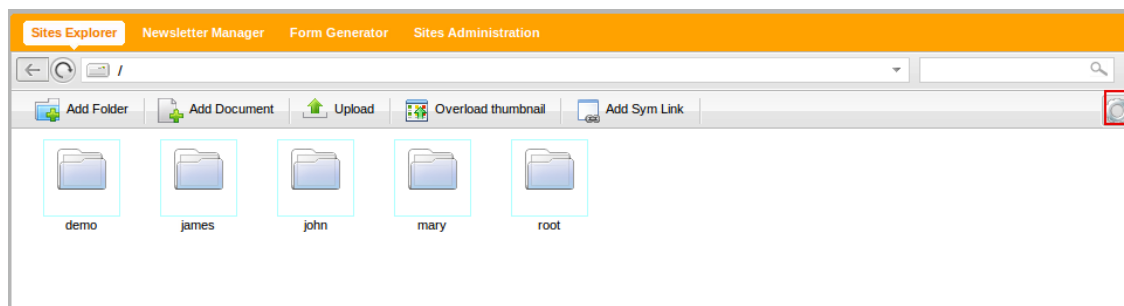
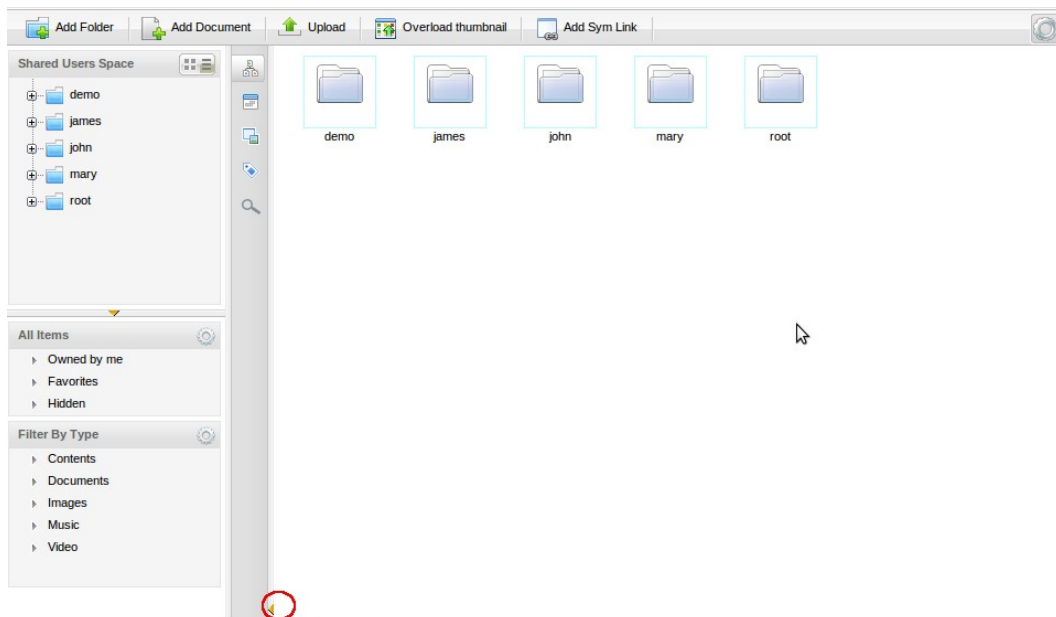


Illustration 14: The hidden side bar

- To show the side bar, select the **Show sidebar** check box in the 'Preferences'.

The 2nd way:

- Click the border of this sidebar to hide it as the illustration below:



- Click that border again to show the sidebar back.

4.6.3 Views

- What is a view?
- Explain View and tab mechanism?

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



*The number of View types depends on which drive you are browsing and you can manage the view types in WCM Administration that only supports **Administrators**. See [here](#) for details.*

4.6.3.1 Admin view

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

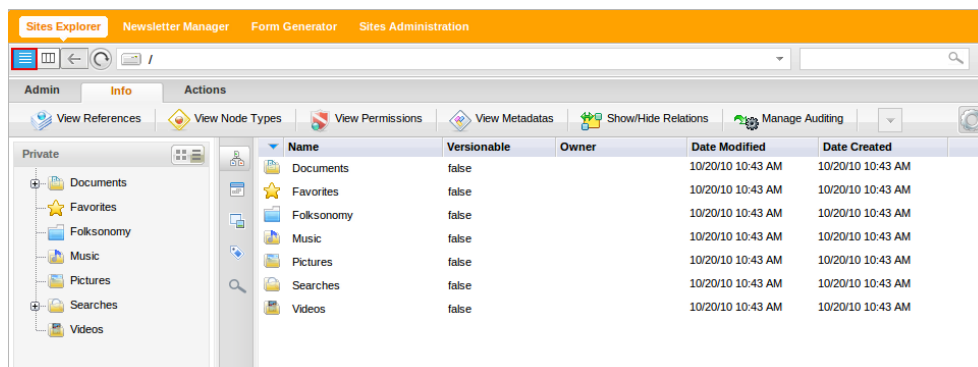
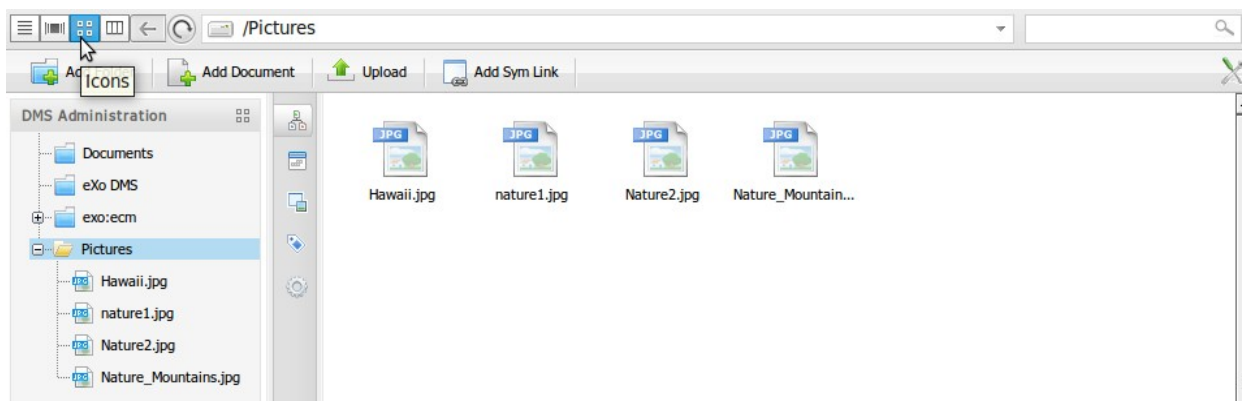


Illustration 15: Admin view

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

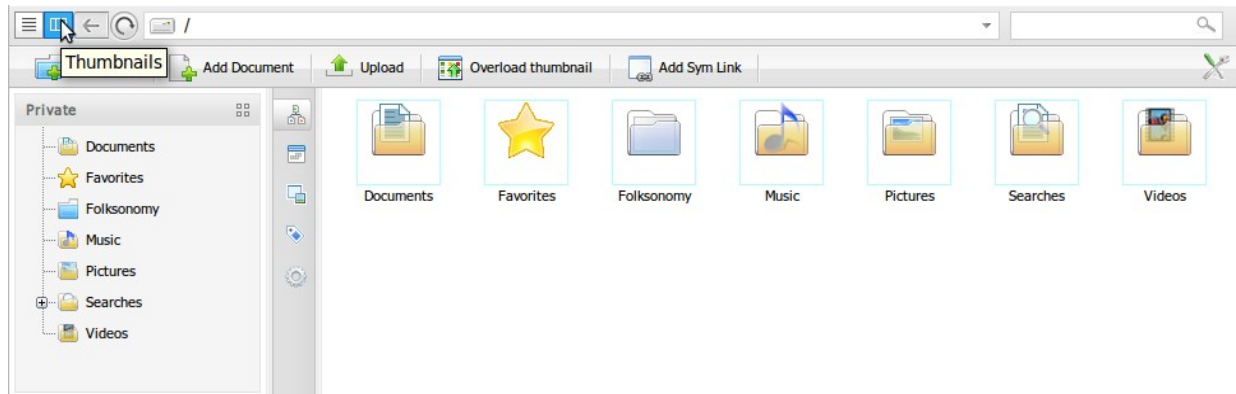
4.6.3.2 Icons view



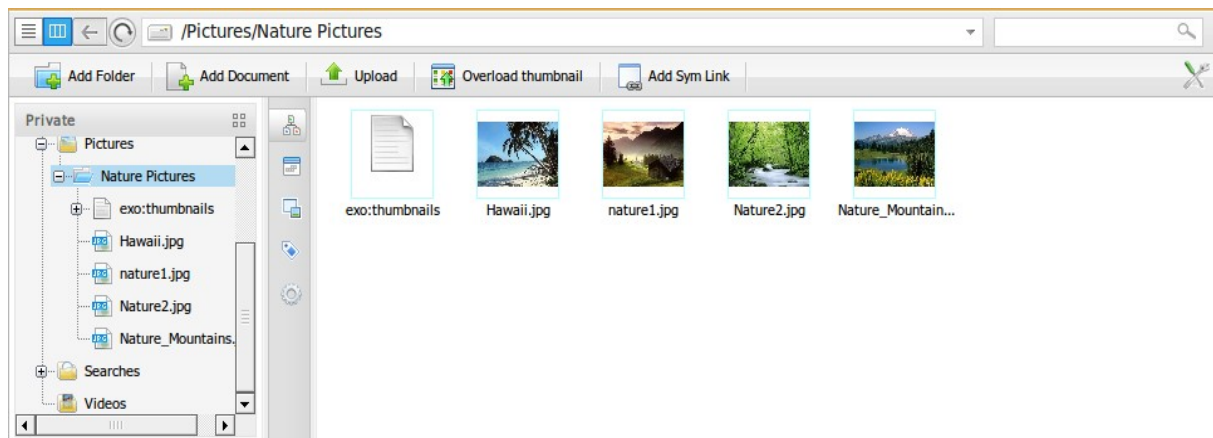
In this view type, nodes in a specific folder will be viewed as icons. The name of each node will be shown under its icon.

4.6.3.3 Thumbnails view

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 as shown 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.

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

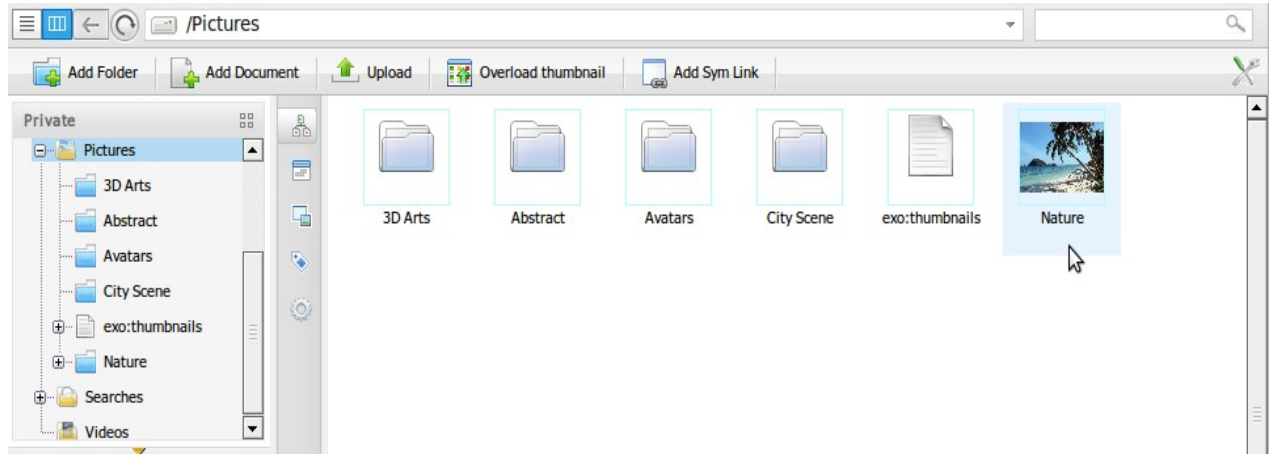
Step 3: Select an image used as a displaying icon for the selected folder by clicking the **Browse...** button.

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

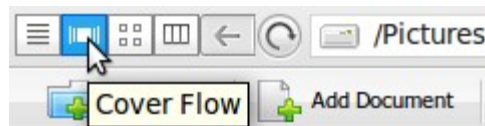
Back to the parent folder (folder Pictures in this example) that contains the selected folder to see a icon used to display:

4.6.3.4 Cover flow view

You can understand this view as a dynamical view because it brings the side – scrolling view



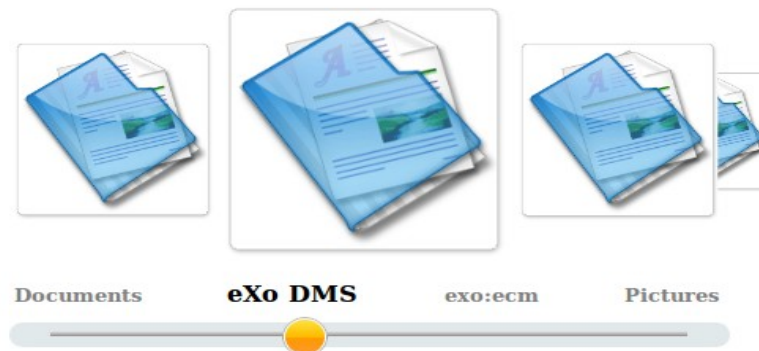
to nodes in a folder. In this view, when a node is selected, its name is set with bold effect to more outstanding than others.



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.

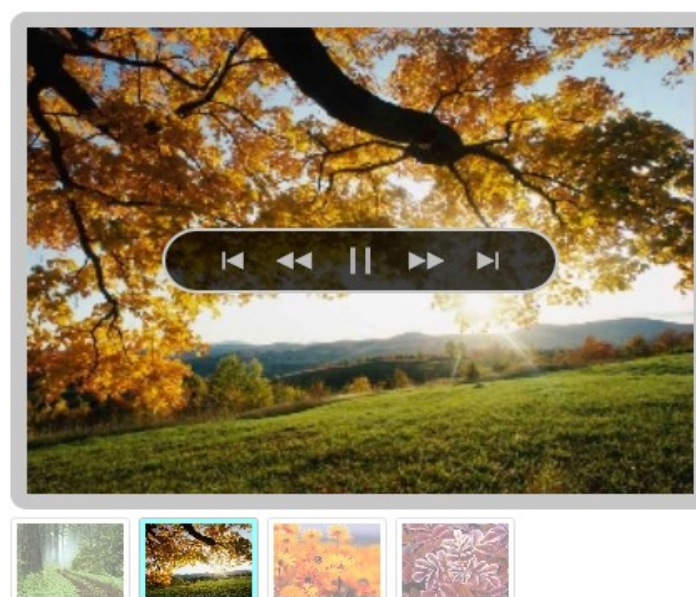
4.6.3.5 Slide show view

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 on 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.

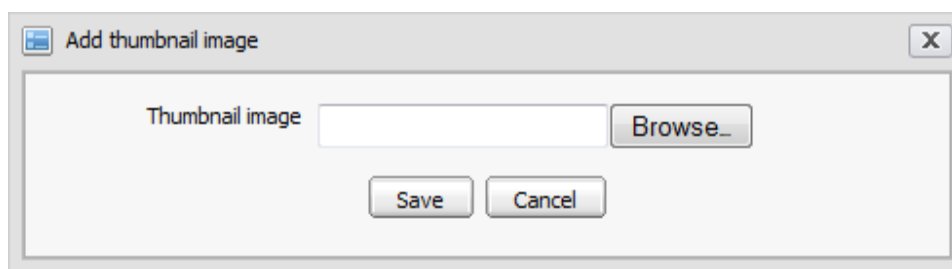



Illustration 17: The Add thumbnail image form









Continue viewing pictures node.

4.6.3.6 Timeline view

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.

4.6.4 Actions

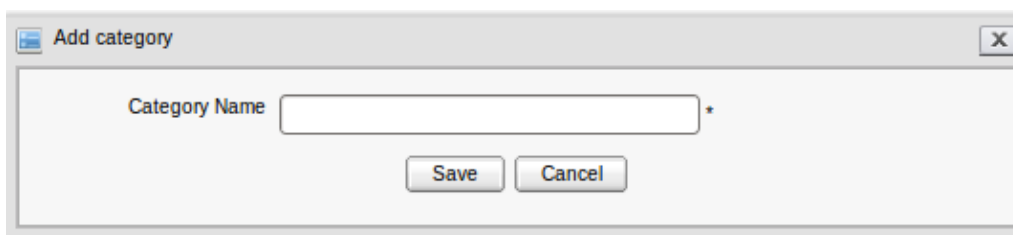
4.6.4.1 Add Category

This function enables you to add a category for a node.

Do as follows to add a category:

Step 1: Choose a node that you want to add a category into.

Step 2: Select  Add category on the action bar and the **Add Category** form appears:



The image shows a dialog box titled "Add category" with a close button (X) in the top right corner. Inside the dialog, there is a text input field labeled "Category Name" followed by an asterisk (*). Below the input field are two buttons: "Save" and "Cancel".

Illustration 18: Add Category form

Step 3: Enter a name for the category in the Category Name field.

Step 4: Click **Save** to accept creating a new category or **Cancel** to quit from this form without adding a category.

4.6.4.2 Add Document

This function enables you add a document directly in to a category to make you easily manage your documents or into a node.

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

See the table below to know which 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.

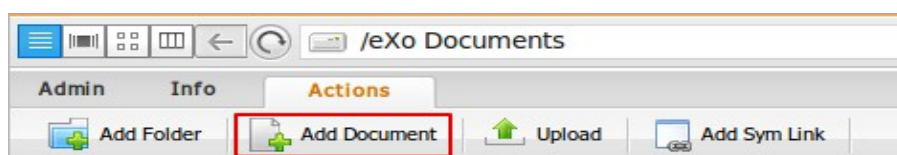
Follow the horizontal, you will know what the node can be added into.

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

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

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

Step 2: Click  Add Document on the action bar:



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

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

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 19: 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.

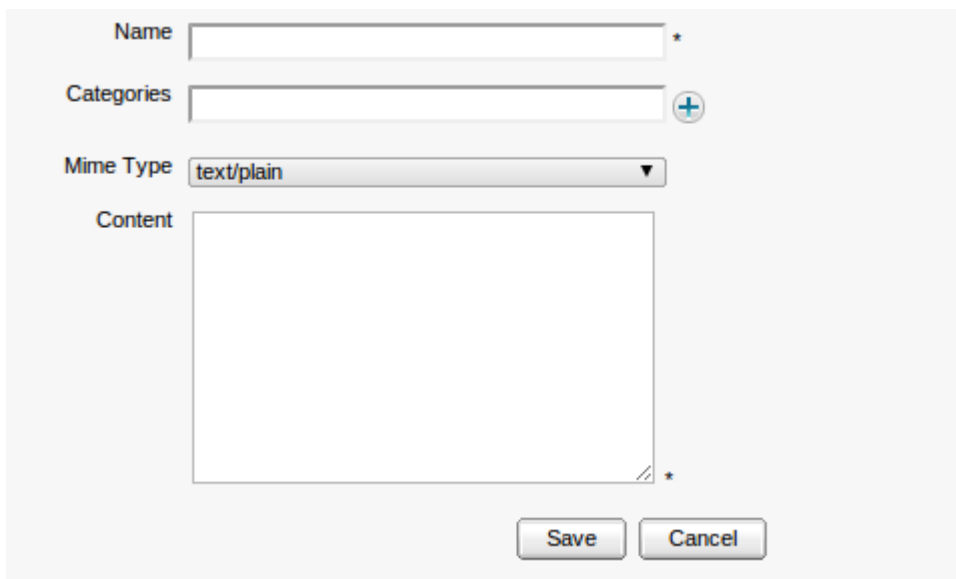
Step 4: Input a value in the **Content** field.

- **text/html:**

If you want to create a File document with a source code and generated content, click the icon  **Source** 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 a new file document. It has four main fields: 'Name' (a text input field with a red asterisk), 'Categories' (a text input field with a blue plus icon), 'Mime Type' (a dropdown menu currently showing 'text/plain'), and 'Content' (a large text area with a red asterisk). At the bottom right, there are two buttons: 'Save' and 'Cancel'.

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:

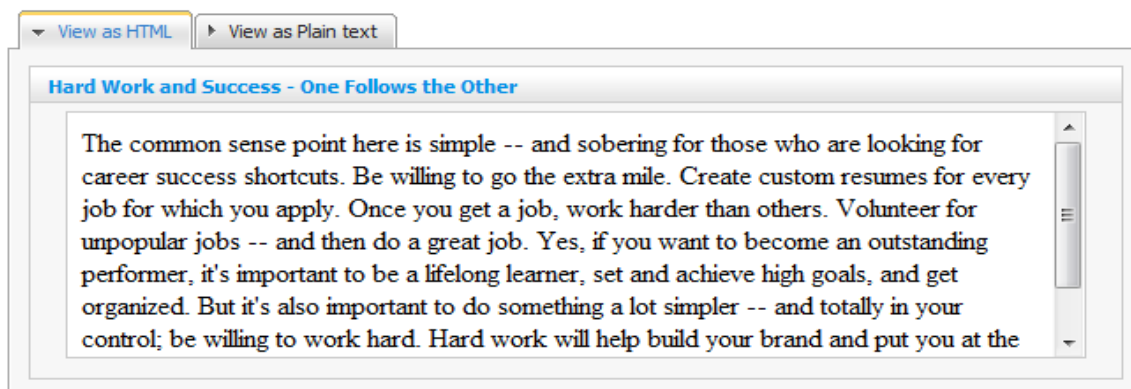


Illustration 20: The View as HTML tab

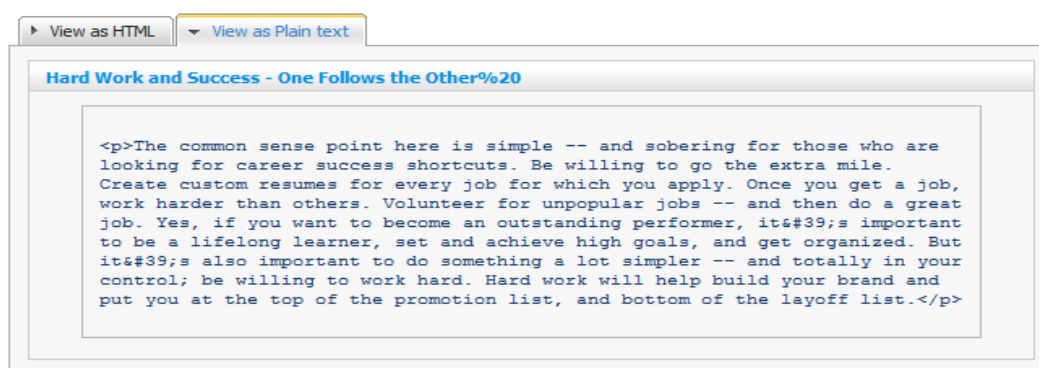


Illustration 21: The View as Plain text tab

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:

Name *

Title *

Summary

Content

Save Cancel

Illustration 22: 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:

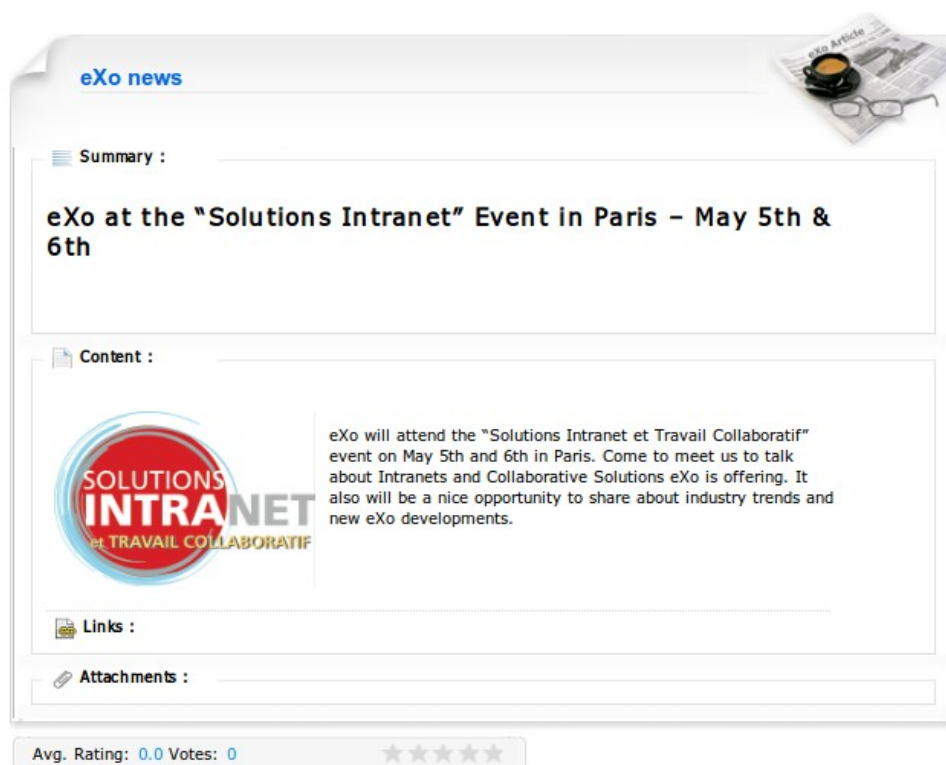

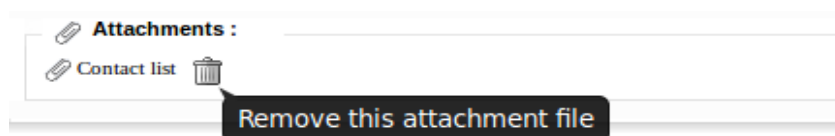


Illustration 23: An example of an Article

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

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

Illustration 24: 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 25: 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:

Illustration 26: The Add new Sample node form

Step 2: Input values for fields.

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computer. Click the upload  icon next to the **Browse...** button to upload the selected file.

Step 4: Click the **Save** to accept or the **Cancel** to quit without saving changes.

After being created, a new sample node will be displayed like the illustration below:




| | |
|---|---|
| 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 27: 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:


The screenshot shows a web form for adding a new file plan. It features three tabs at the top: 'Name' (active), 'Record properties', and 'Process properties'. The 'Name' tab contains three input fields: 'Name' (with an asterisk indicating it is required), 'Categories' (with a plus icon for adding more), and 'File plan note' (a large text area). At the bottom of the form are 'Save' and 'Cancel' buttons.

Illustration 28: 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 handing information for users. |

The **Record properties** Tab:

The screenshot shows the 'Record properties' tab selected. The fields and their values are as follows:

- Record category identifier**: Text input field with an asterisk.
- Disposition authority**: Text input field with an asterisk.
- Permanent record indicator**: Dropdown menu set to 'True' with an asterisk.
- Disposition instructions**: Large text area.
- Contains records folder**: Dropdown menu set to 'True' with an asterisk.
- Default media type**: Dropdown menu set to 'Electronic' with an asterisk.
- Default marking list**: Dropdown menu set to 'None' with an asterisk.
- Default originating organization**: Text input field with an asterisk.
- Vital record indicator**: Dropdown menu set to 'True' with an asterisk.
- Vital record review period**: Dropdown menu set to 'One Minute'.

Illustration 29: 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 the following fields and controls:

- Process cutoffs**: Dropdown menu set to 'True' with an asterisk (*).
- Event trigger**: Text input field with an asterisk (*).
- Cutoff period**: Dropdown menu set to 'One Minute'.
- Cutoff on obsolete**: Dropdown menu set to 'True'.
- Cutoff on superseded**: Dropdown menu set to 'True'.
- Process hold**: Dropdown menu set to 'True' with an asterisk (*).
- Hold period**: Dropdown menu set to 'One Minute'.
- Discretionary Hold**: Dropdown menu set to 'True'.
- Process transfer**: Dropdown menu set to 'True' with an asterisk (*).
- Default transfer location**: Text input field.
- Transfer block size**: Text input field.
- Process accession**: Dropdown menu set to 'True' with an asterisk (*).
- Accession location**: Text input field.
- Accession block size**: Text input field.
- Process destruction**: Dropdown menu set to 'True' with an asterisk (*).

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

Illustration 30: 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 |

| Record Id | Record name | Originator | Date Received | Originating Organization |
|-----------|-------------|------------|---------------|--------------------------|
|-----------|-------------|------------|---------------|--------------------------|

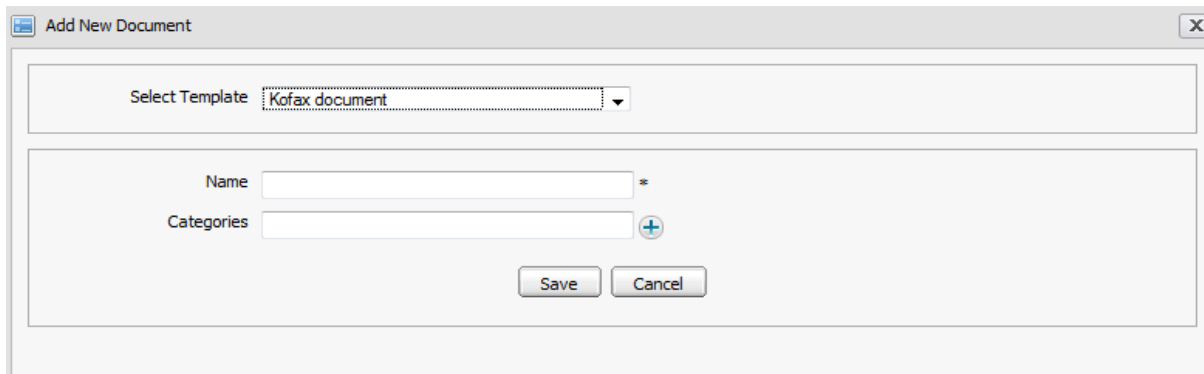
Illustration 31: The screen of a File Plan

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 illustration 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" with an asterisk (*) indicating it is required, and "Categories" with a plus (+) button next to it. At the bottom right of the form are "Save" and "Cancel" buttons.

Illustration 32: The Add New Document form with the Kofax template

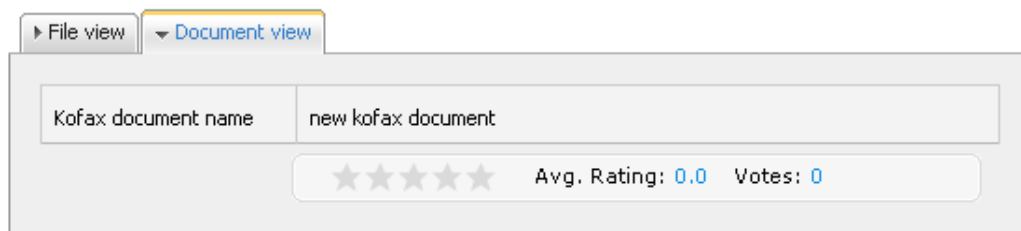
(*): required.

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 **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:

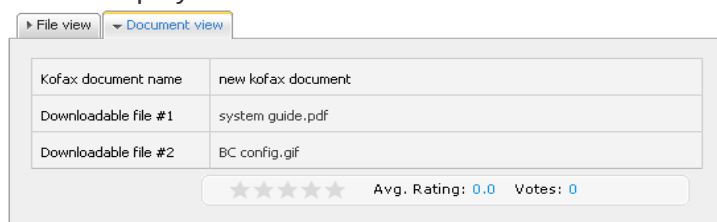


Illustration 33: The Kofax Document view tab

Create new Event

Do as follows:

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

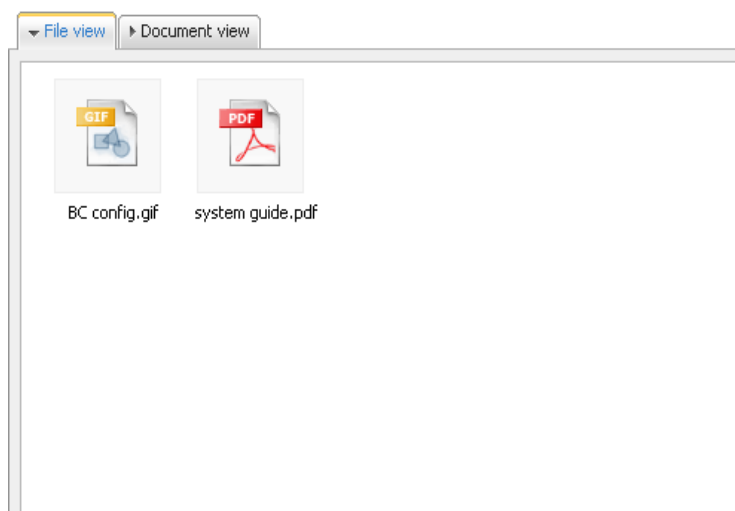


Illustration 34: The Kofax File view

the drop-down list.

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

Select Template: Event

Title *

Name *

Language: en

Location *

Google Maps ? ☐

Start date/time: 05/21/2010

End date/time: 05/21/2010

URL

Summary

Content

Save Cancel

Illustration 35: 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

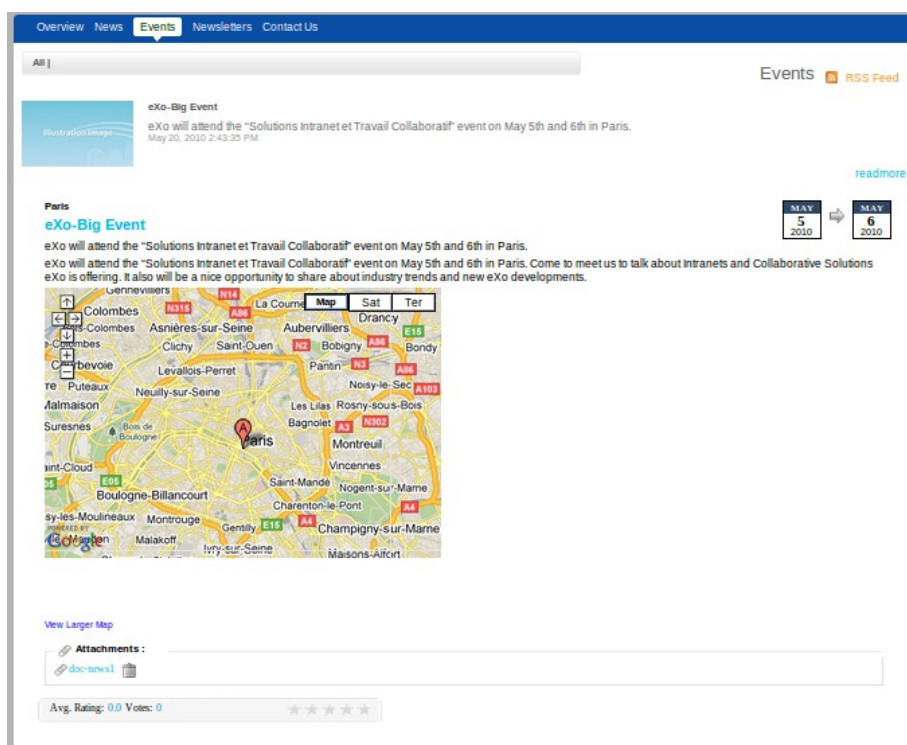
eXo-Big Event

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.



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

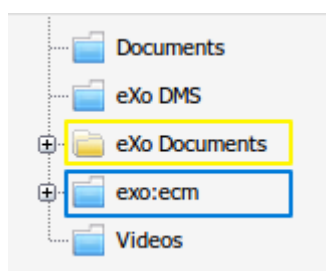


4.6.4.3 Add Folder

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:

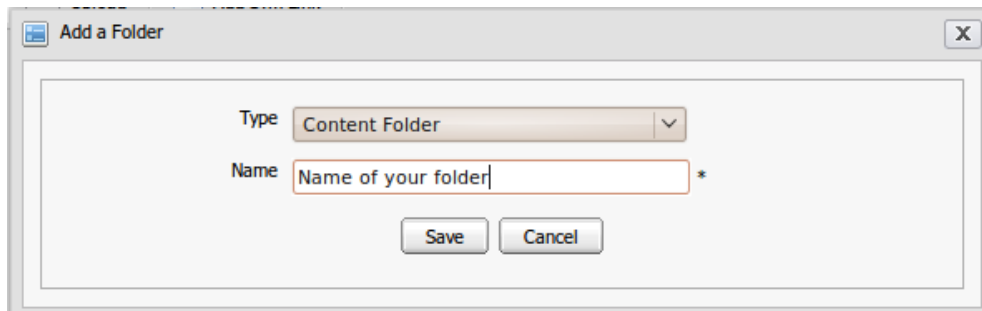


Illustration 36: The Add a Folder form

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:

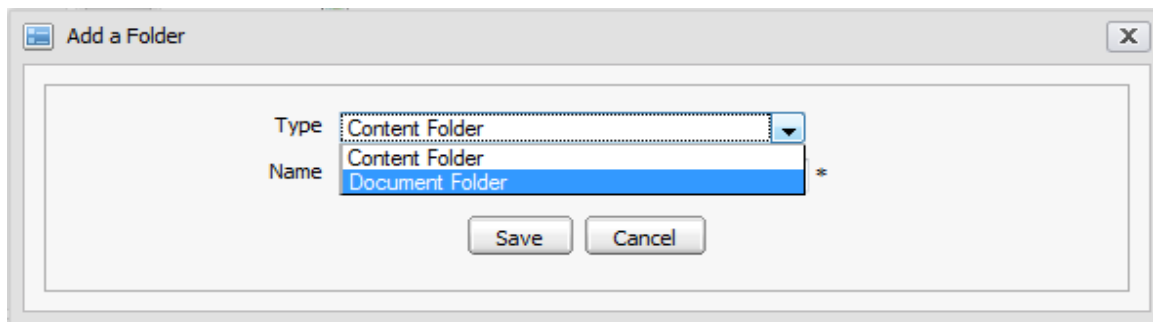



Illustration 37: The Add a Folder form

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]).

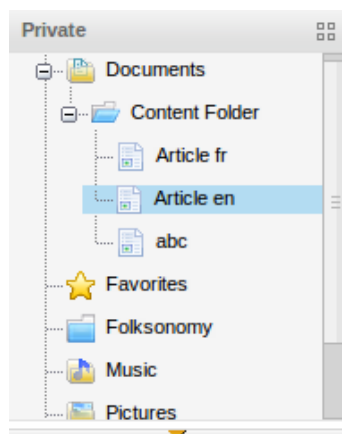
4.6.4.4 Add Translation


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**

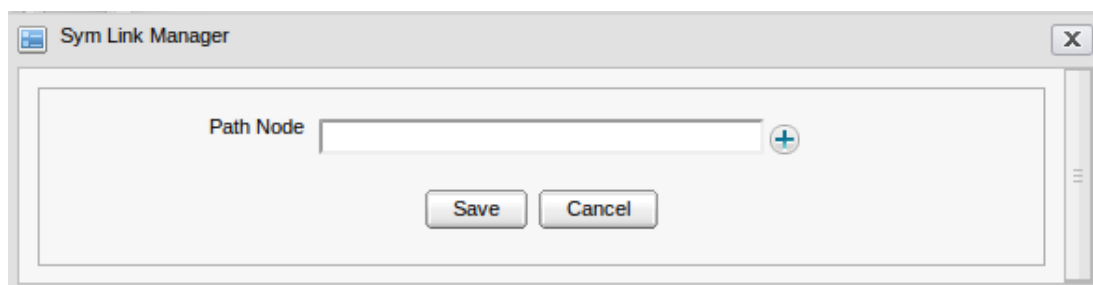
- ✓ To add a translation to the document, do as follows:


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

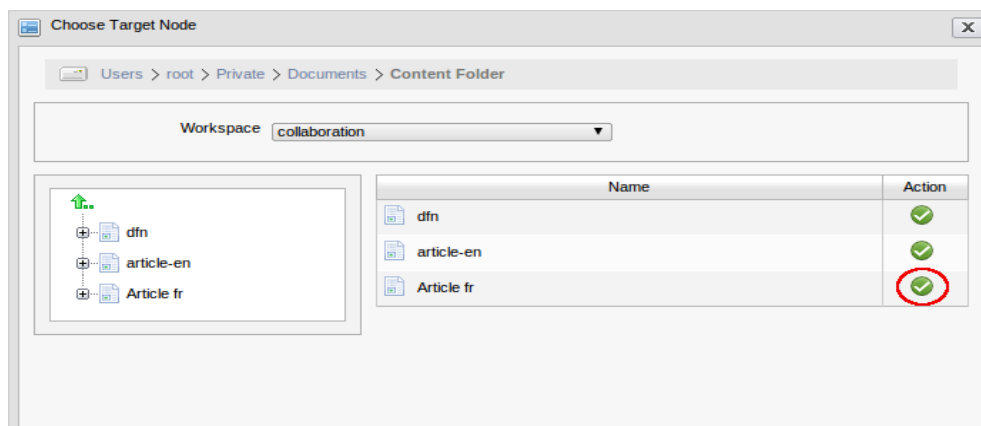


Step 2: Click  **Add Translation** on the **Action** bar.

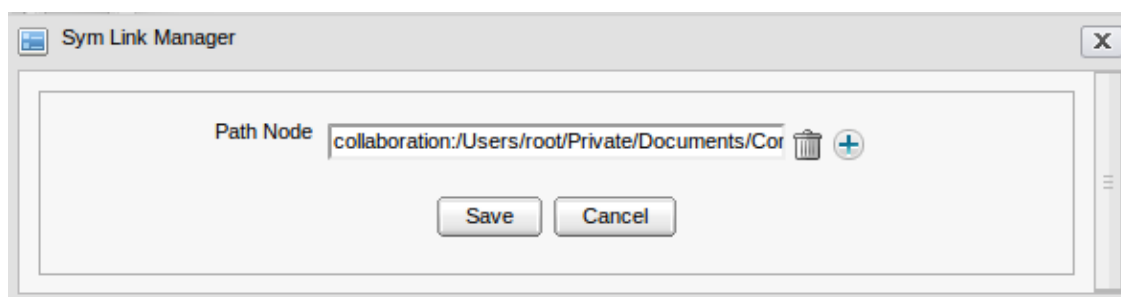
The **SymLink Manager** form will appear:



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.



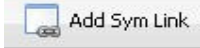
4.6.4.5 Add Symlink

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:

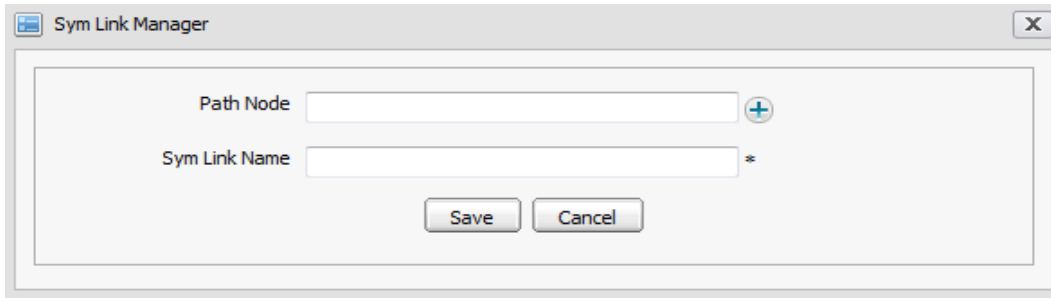

The image shows a 'Sym Link Manager' dialog box. It has a title bar with a close button. Inside, there are two text input fields: 'Path Node' and 'Sym Link Name'. The 'Path Node' field has a blue plus icon to its right. The 'Sym Link Name' field has an asterisk to its right. Below the fields are 'Save' and 'Cancel' buttons.

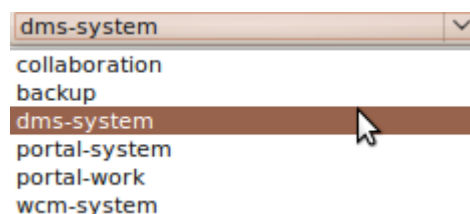
Illustration 38: The Sym Link Manager form


Details:

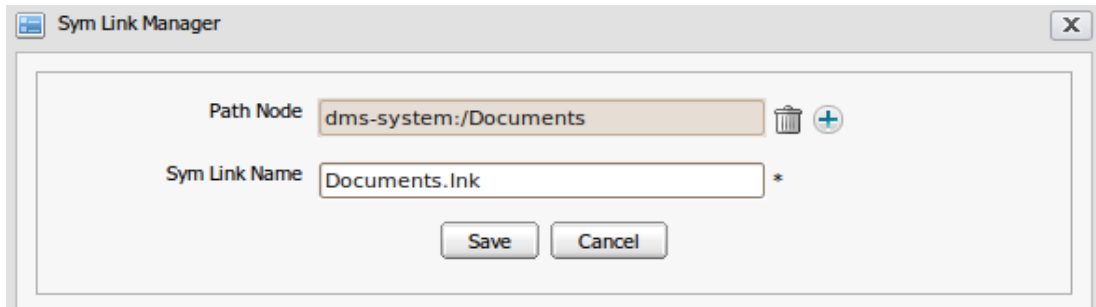
| | |
|----------------|---------------------|
| Path Node | The path of a link. |
| Sym Link Name: | The name of a link. |

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.



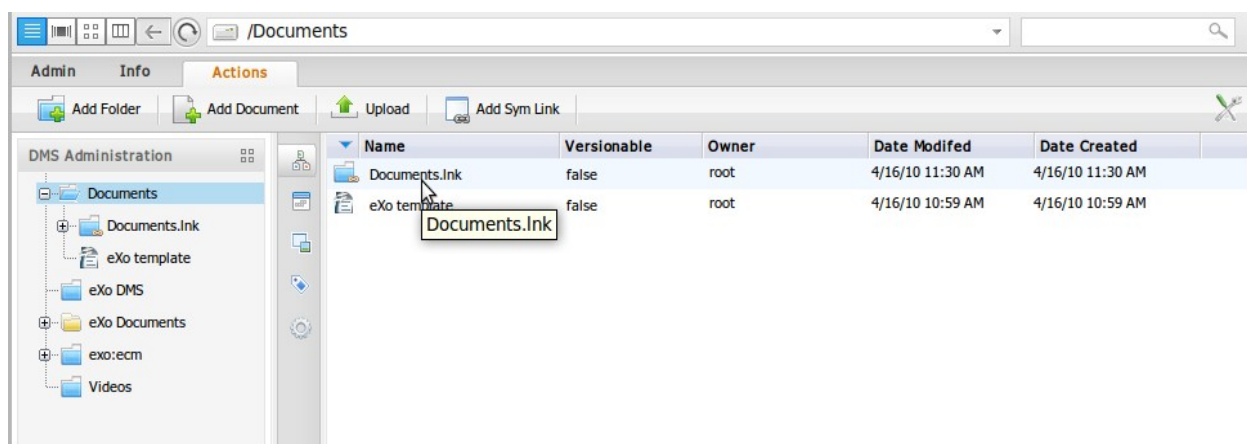
Step 6: Click the icon  in the row of the node that you want to add, the path of that node will appear in the **Path Node** field and the name of the node is set by the name of the selected node. You can also edit this name.



The Sym Link Manager form is a dialog box with a title bar. It contains two text input fields: 'Path Node' with the value 'dms-system:/Documents' and 'Sym Link Name' with the value 'Documents.Ink'. To the right of the 'Path Node' field are a trash icon and a plus icon. Below the input fields are 'Save' and 'Cancel' buttons.

Illustration 39: 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.

4.6.4.6 Comment

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: Click  **Comment this document** on the action bar. The **Add Comment** form will appear:

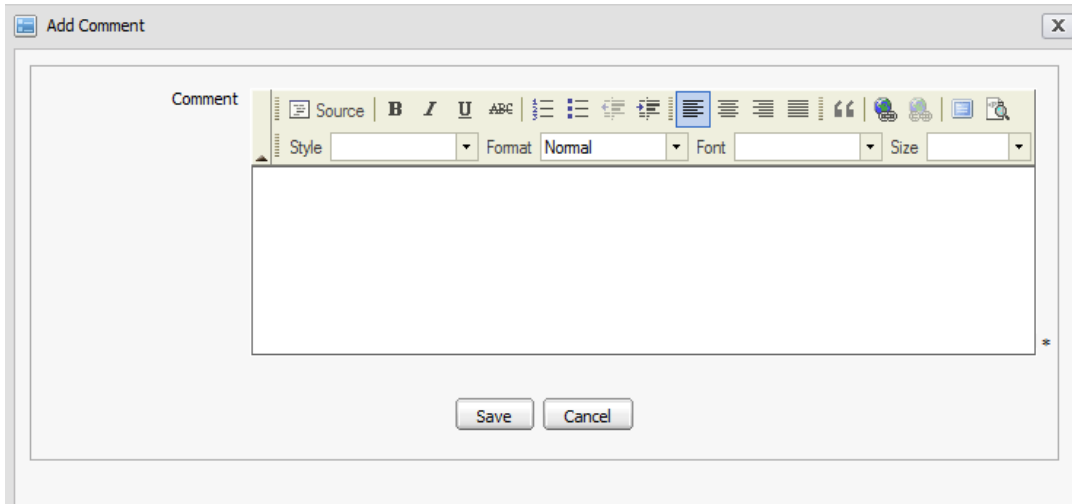
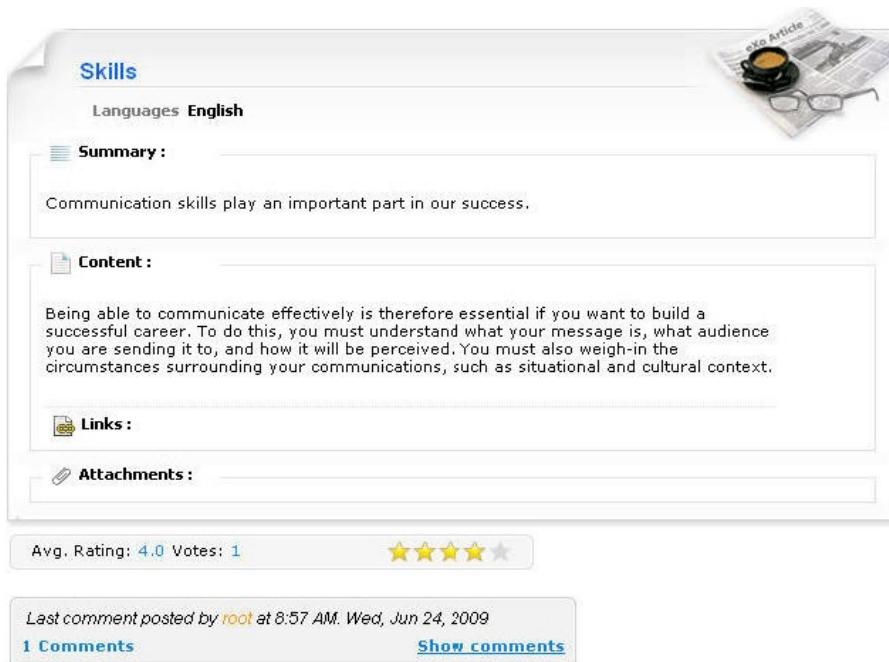


Illustration 40: The Add comment form

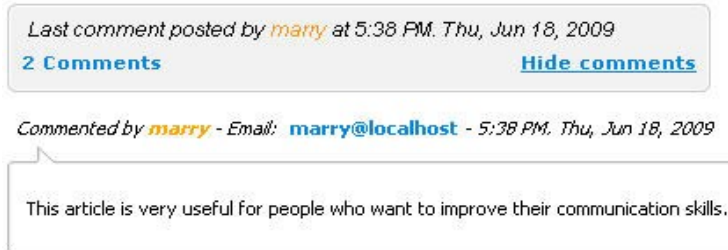
Step 3: Input the content in **Comment** (this field is required).



Step 4: Click **Save**.

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



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




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

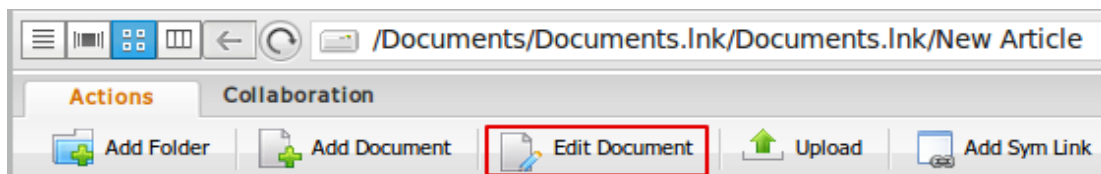
4.6.4.7 Edit Document

There are two ways to edit a document:

Do as one of follows:

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

Step 2: Click the  Edit Document on the Action bar.



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 3: Click **Save** to save new changes.

4.6.4.8 Export Node

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 41: 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.


4.6.4.9 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  **Import Node**. The **Import Node** form will be displayed:

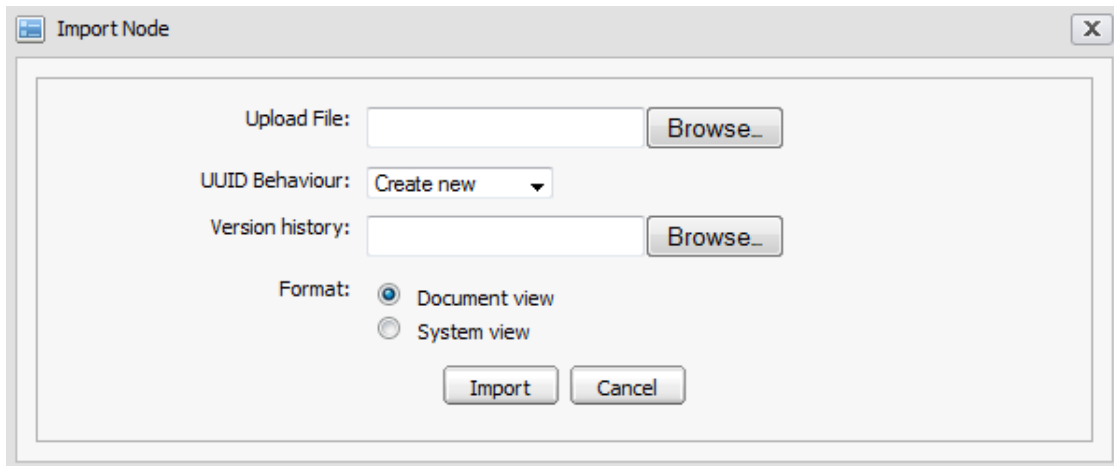



Illustration 42: The Import Node form

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.

4.6.4.10 Manage Actions


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:

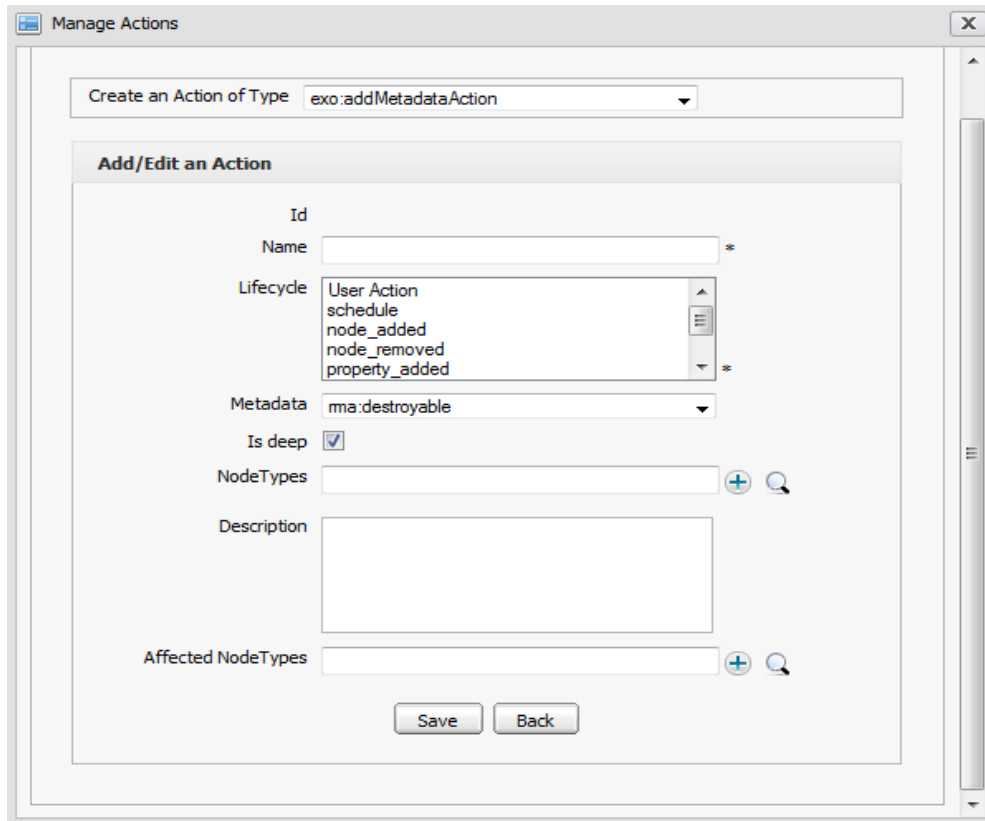

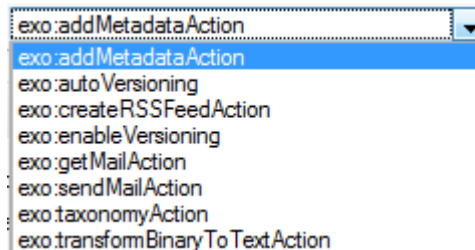


Illustration 43: The Add Action tab in the Manage Actions form

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.

View an action

Do as follows to view an action:

Step 1: In the **Manage Actions** form, select the **Available Actions** tab:

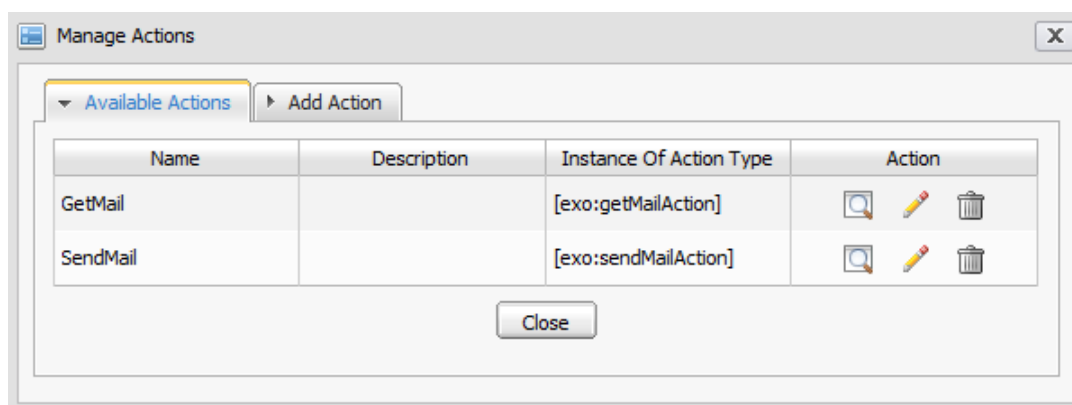

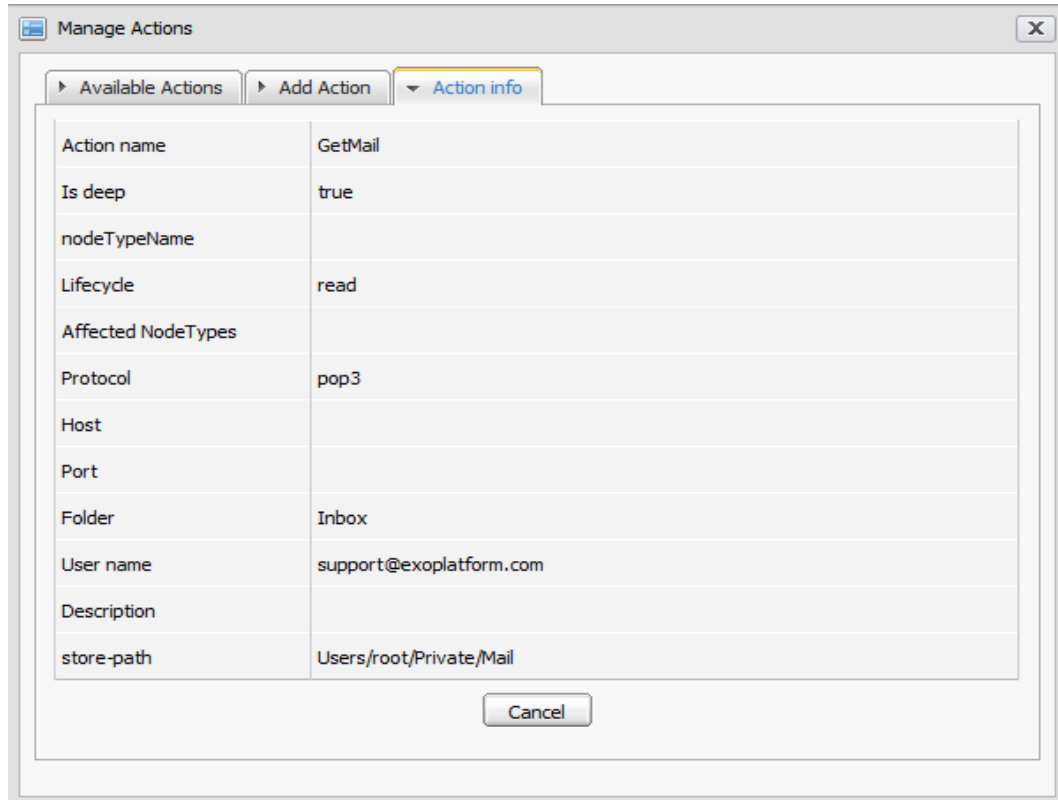


Illustration 44: The Available Actions tab in the Manage Actions form

Step 2: Click  corresponding to an action that you want to view.

Information of this action will appear in the **Action info** tab:



| | |
|--------------------|-------------------------|
| 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 |

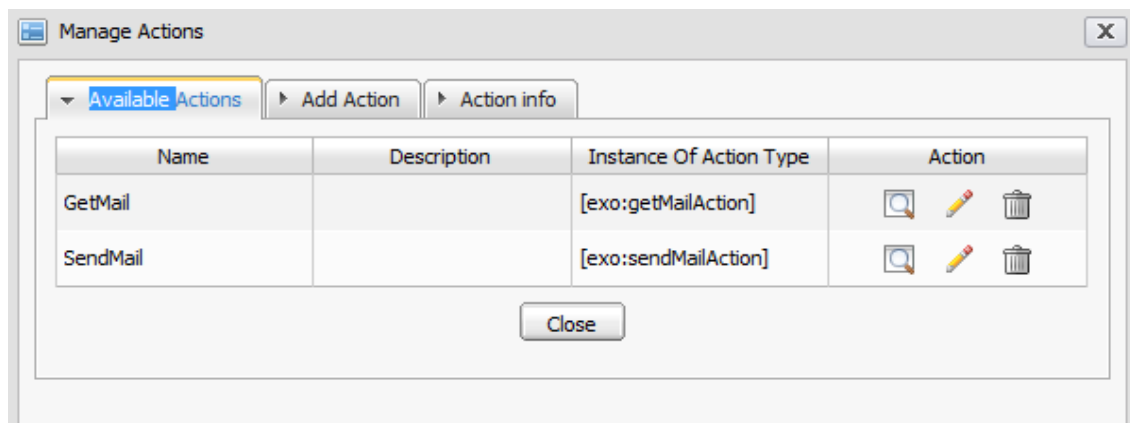
Cancel







Illustration 45: The Action info tab in the Manage Actions form

Edit an action


Do as follows to edit an action:

Step 1: In the **Manage Actions** form, select the **Available Actions** tab:



| Name | Description | Instance Of Action Type | Action |
|----------|-------------|-------------------------|---|
| GetMail | | [exo:getMailAction] |    |
| SendMail | | [exo:sendMailAction] |    |

Close

Step 2: Click the edit icon  on an action which you want to edit.

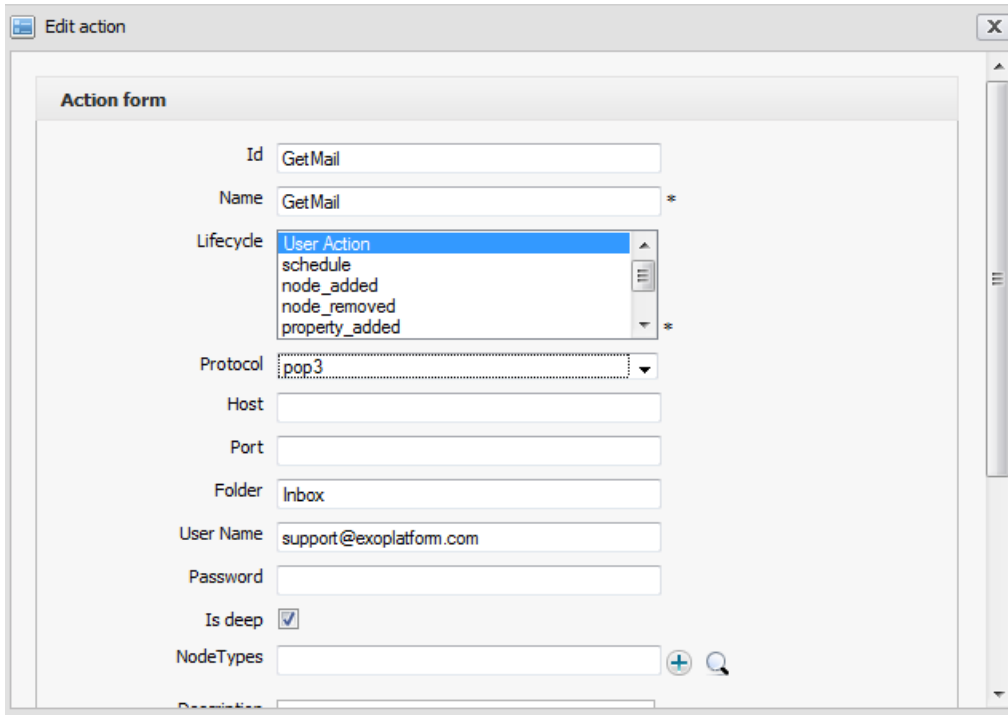


Illustration 46: The Edit action form


Step 3: Edit the properties in this form.

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

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.

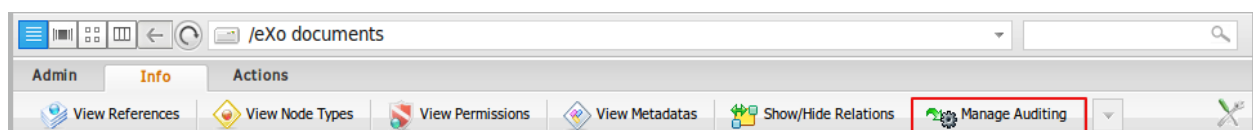
4.6.4.11 Manage Auditing

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:

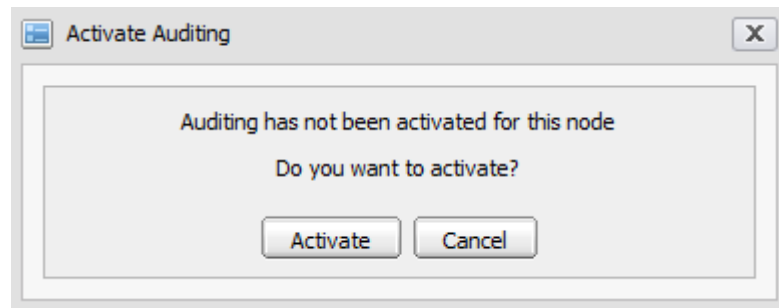



Illustration 47: The Activate Auditing form

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:

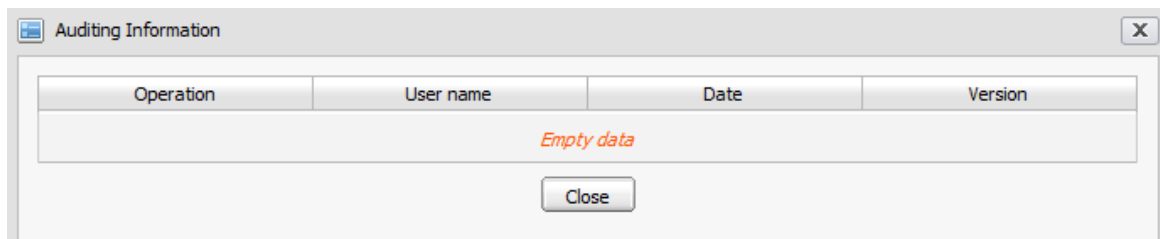
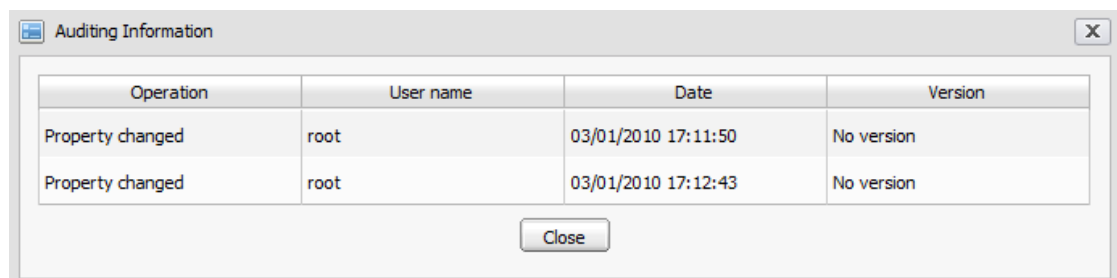


Illustration 48: The Auditing Information form

If the selected node has property changes, the **Auditing Information** form will list detail changes:



4.6.4.12 Manage Categories

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:

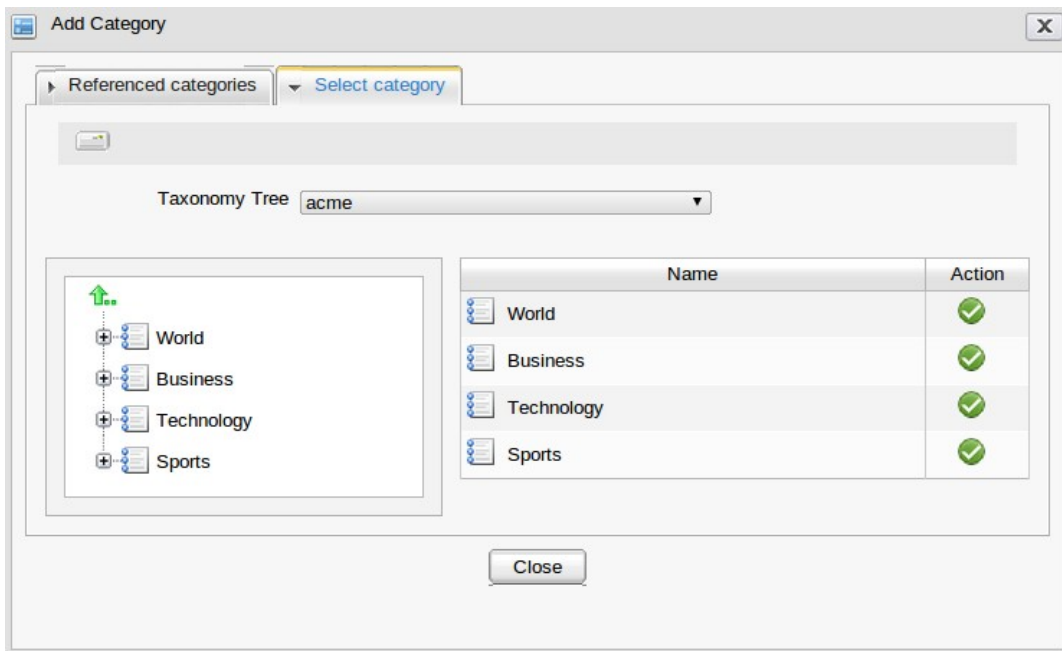
Do as follows:

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.



| Name | Action |
|------------|--------|
| World | ✓ |
| Business | ✓ |
| Technology | ✓ |
| Sports | ✓ |

Illustration 49: 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:

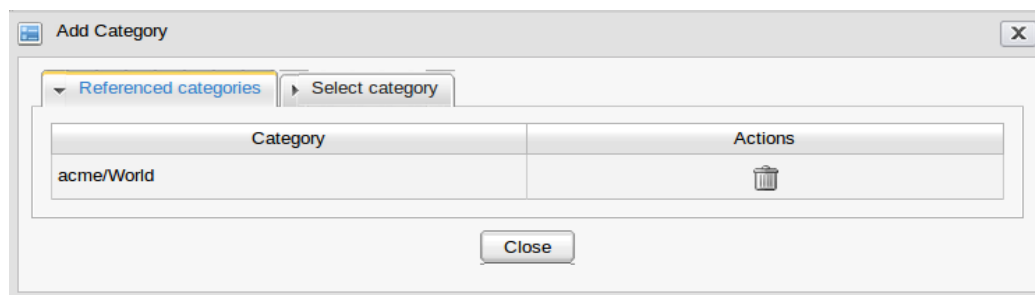


Illustration 50: The Referenced categories tab in the Add Category form

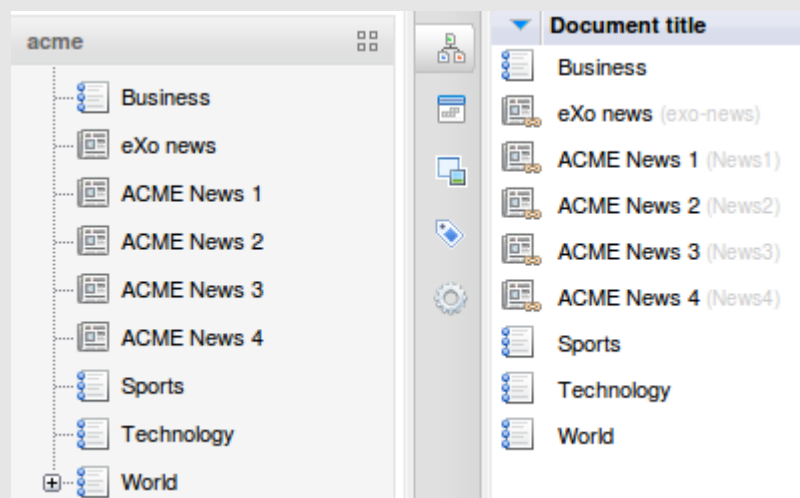
After being added a category, the node will be included in that category.

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:




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.

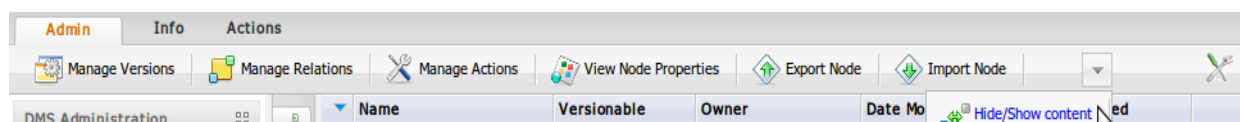
4.6.4.13 Hide/Show Content


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  **Hide/Show content** 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  **Hide/Show content** again.

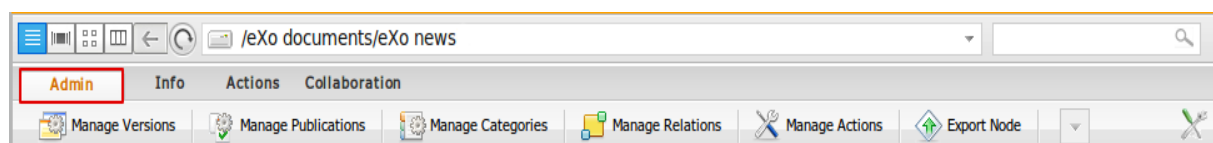
4.6.4.14 Manage Publications

This function is used to manage publications of a node.

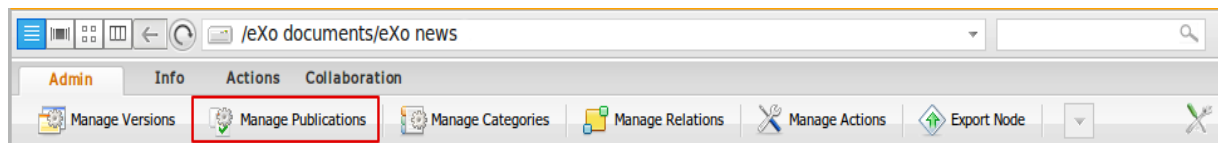
Do as follows:

Step 1: Select a node (on the left or right panel) which you want to manage the publication.

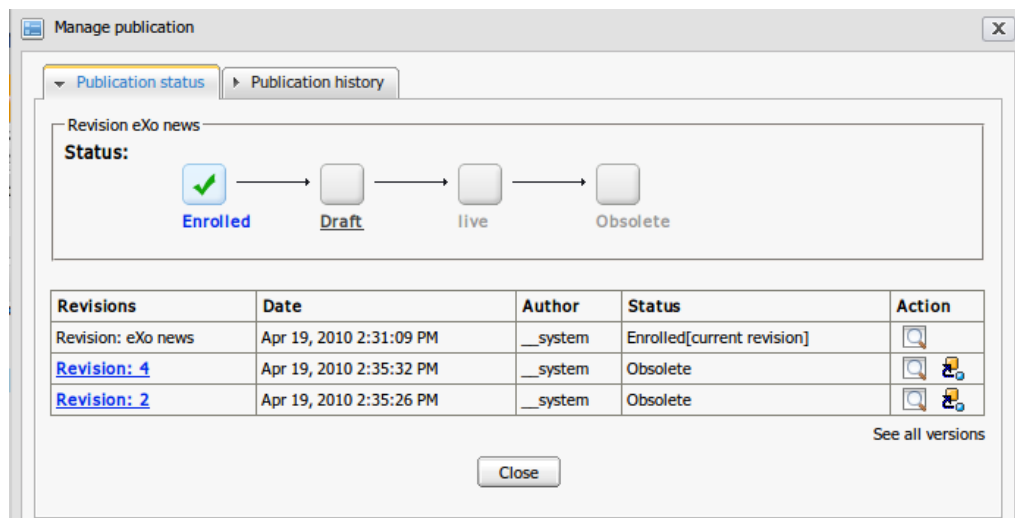
Step 2: Select the **Admin** tab to show some administration actions on the **Action** bar:



Step 3: Click  **Manage Publications** on the Action bar.



The **Manage publication** form will be shown immediately:








The 'Manage publication' form displays the 'Publication status' tab. It shows a status flow diagram 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 51: 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.

| Date | Revision name | Current state | Author | Description |
|-------------------------|---------------|---------------|----------|-------------|
| Apr 19, 2010 2:34:23 PM | eXo news | Enrolled | root | enrolled |
| Apr 19, 2010 2:34:23 PM | eXo news | Draft | root | draft |
| Apr 19, 2010 2:35:26 PM | 2 | Published | __system | published |
| Apr 19, 2010 2:35:28 PM | eXo news | Draft | __system | draft |
| Apr 19, 2010 2:35:29 PM | 2 | Obsolete | __system | obsolete |
| Apr 19, 2010 2:35:29 PM | 3 | Published | __system | published |
| Apr 19, 2010 2:35:31 PM | eXo news | Draft | __system | draft |
| Apr 19, 2010 2:35:32 PM | 3 | Obsolete | __system | obsolete |
| Apr 19, 2010 2:35:32 PM | 4 | Published | __system | published |
| Apr 19, 2010 2:49:23 PM | eXo news | Draft | __system | draft |

Total pages: 2

Close

Step 6: Complete this node's publication management by clicking **Save**.


4.6.4.15 Manage Relations

This function allows making a relationship from all current nodes to nodes.

Add relation for a node

Do as follows to add relations for a node:

Step 1: Select a node that you want to add relations.

Step 2: Select  on the action bar to show the **Add Relation** form:

Add Relation

Relation List | Select relation

Relations | Actions

Empty data

Close

Illustration 52: The Add Relation form

Step 4: Select the **Select relation** tab to open a document list in different folders.

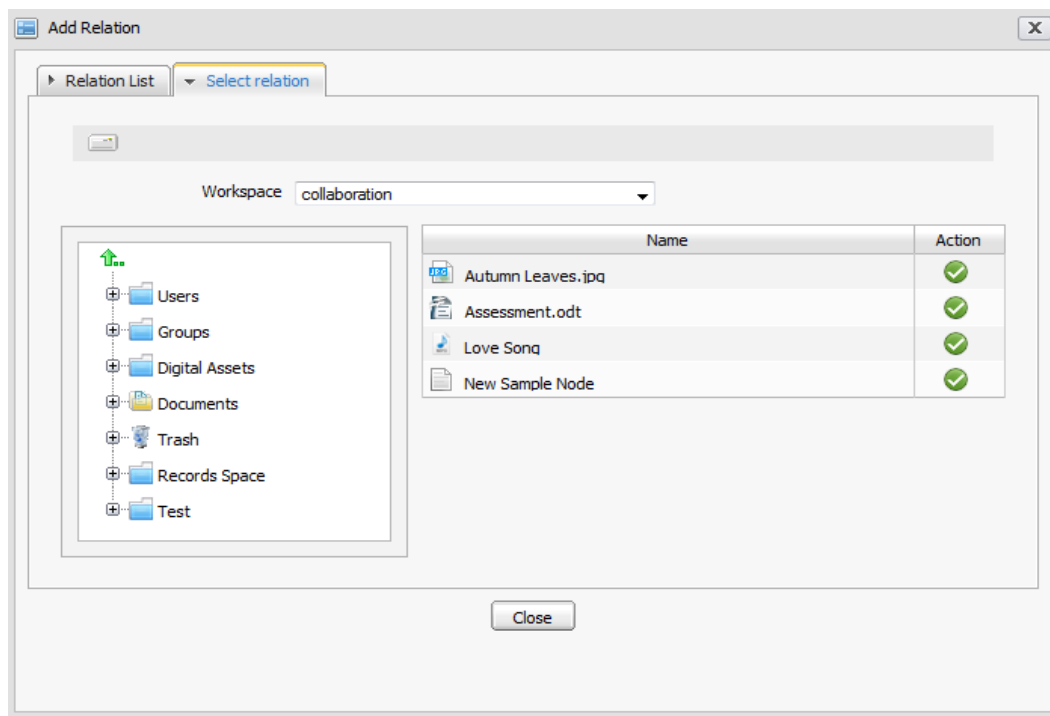
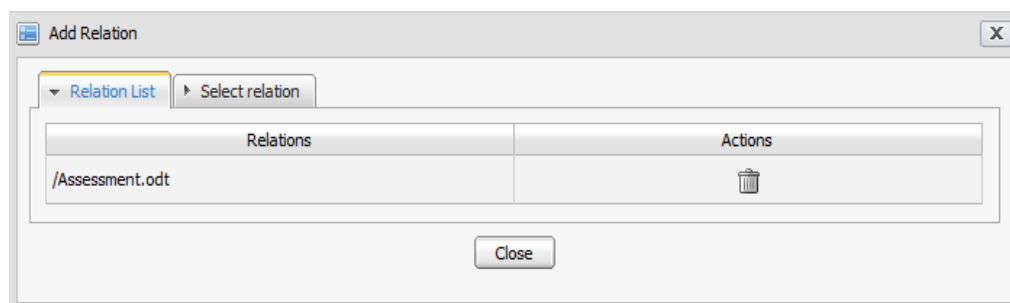


Illustration 53: The Select relation tab in the Add Relation form

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 cannot 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.

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



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.

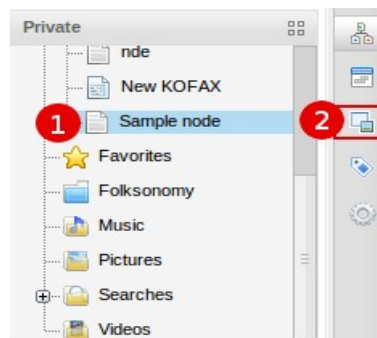
Step 5: Click **OK** on the confirmation message to accept deleting or click **Cancel** to quit. The related document will be deleted from this list.

View Relations of node

You can view all the relation documents of a node by doing following steps:

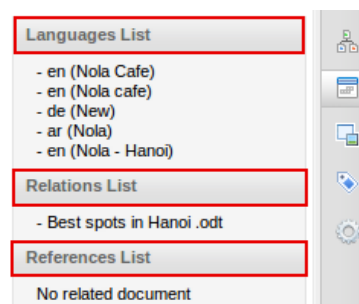
Step 1: Select a node that contains relation documents.

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.



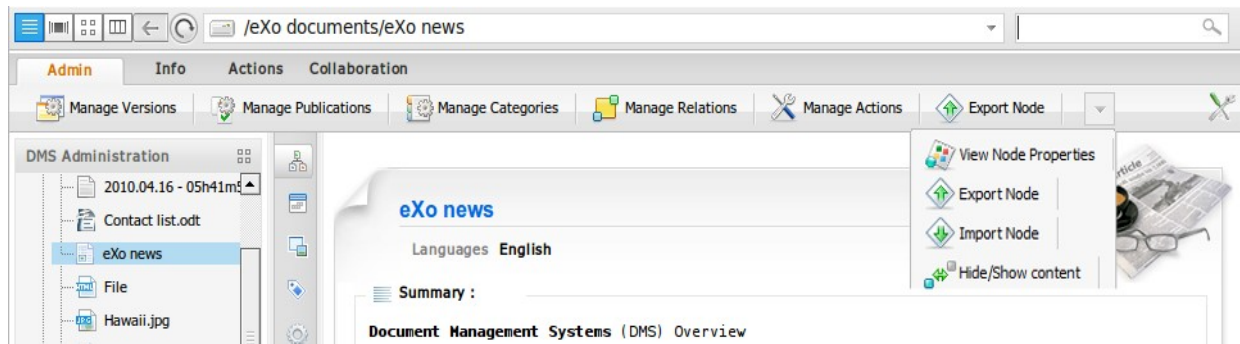
4.6.4.16 Manage Version

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.

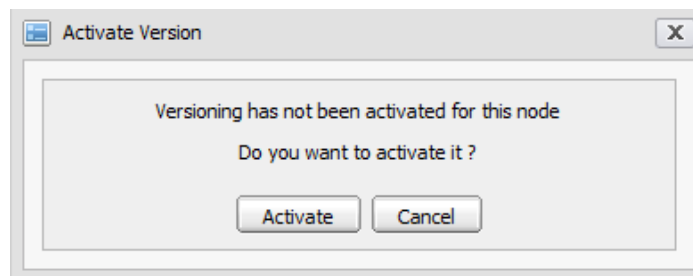
Add versions for node

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:

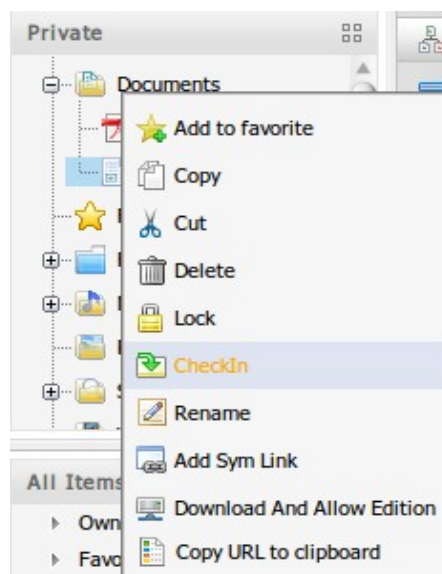


Step 3: Click  **Manage Versions**. A confirmation message will appear:



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:

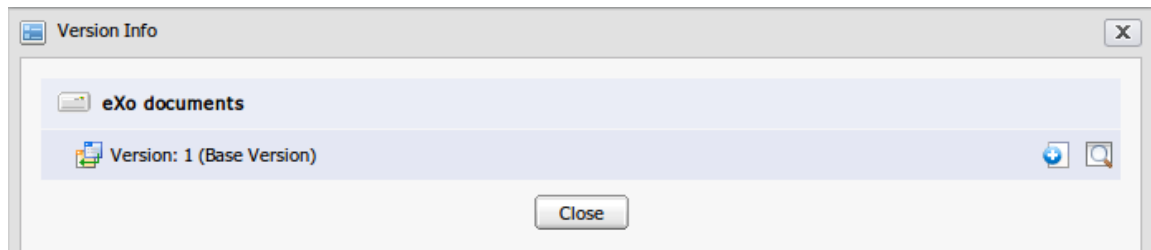


Illustration 54: The Version info form

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**

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:

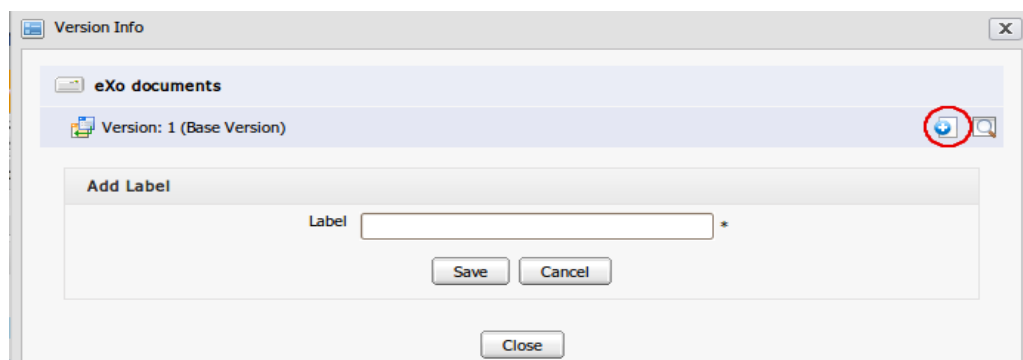


Illustration 55: The Version Info form


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:

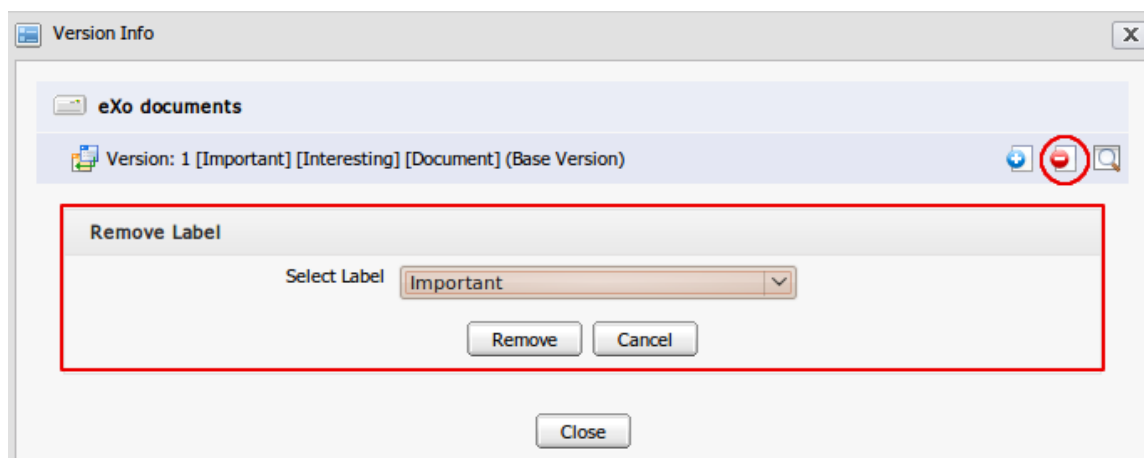


Illustration 56: The Remove label form

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

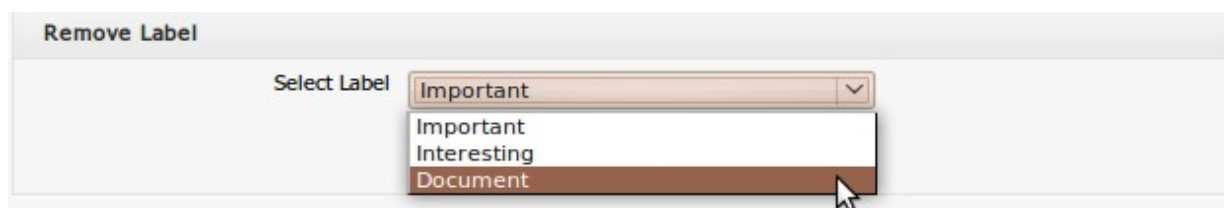


Illustration 57: Select Label in the Remove Label form

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

View versions of nodes

Do as follows 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:

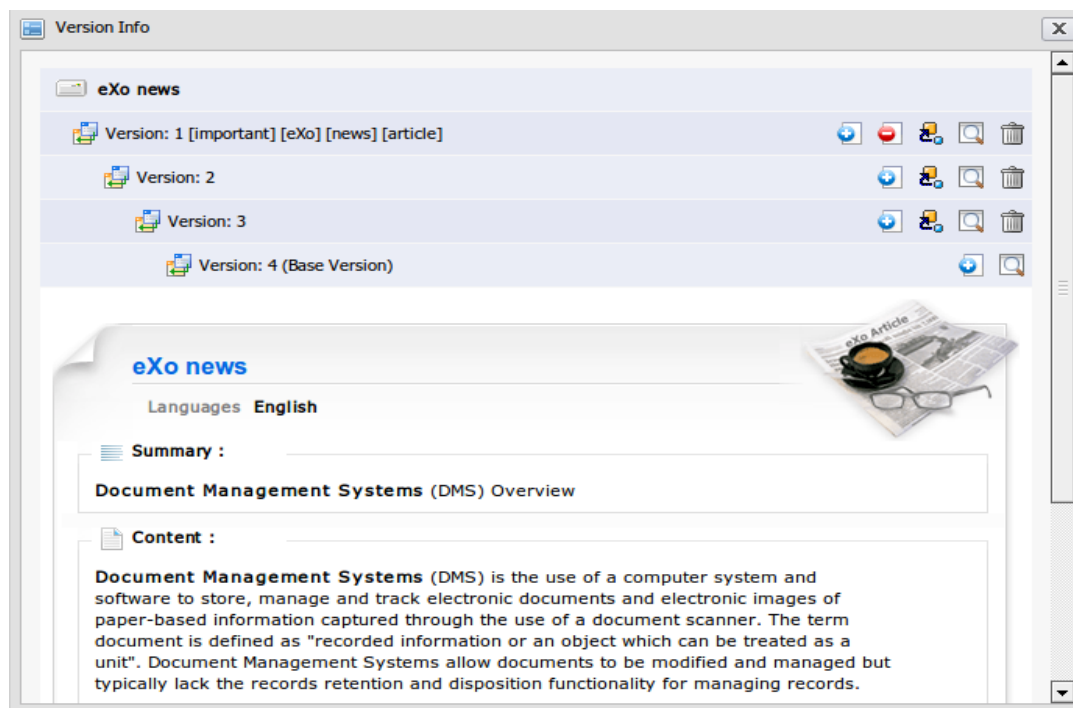



Illustration 58: The version info form



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.

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.

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.

4.6.4.17 Multi Language

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

The **Multi-language** form will appear:

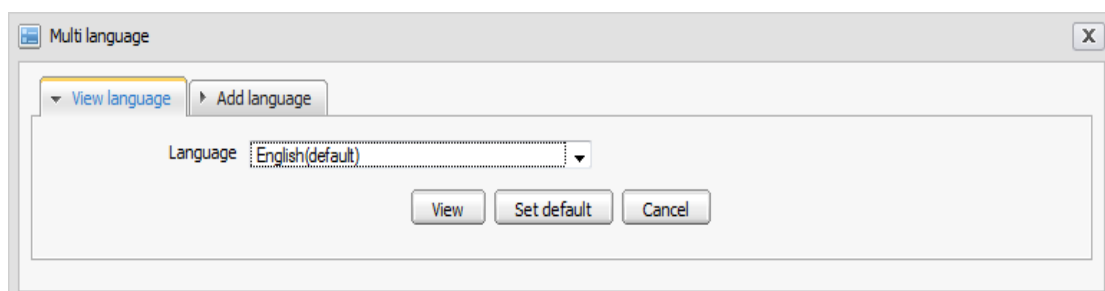


Illustration 59: The Multi-language form

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:

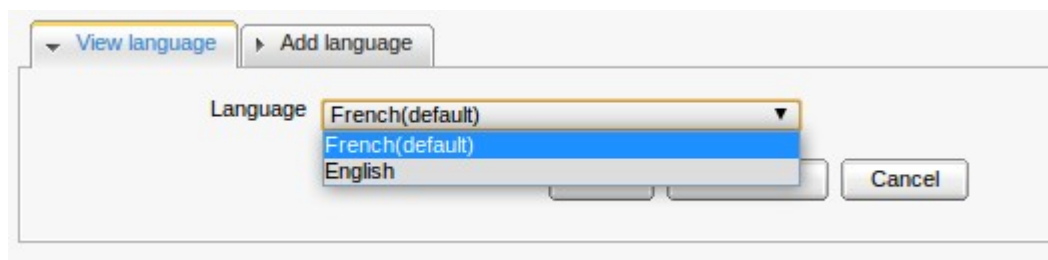
Illustration 60: Add language tab

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.

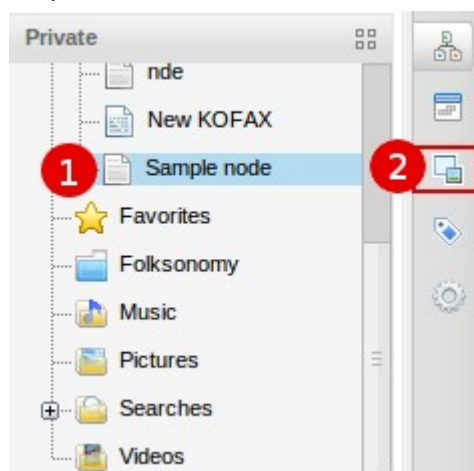
Step 6: Click **Save**, you will be back to the **View language** tab. Your selected language is now added into the **Language** field:



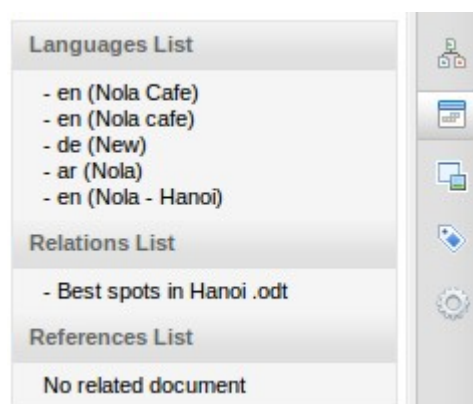
You can view this document in new added language by selecting the language from the language drop-down list then click the **View** button.

- ✓ 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 languages for it.

4.6.4.18 Overload Thumbnail

You can easily overload a thumbnail image for a folder.

Do as follows:

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:

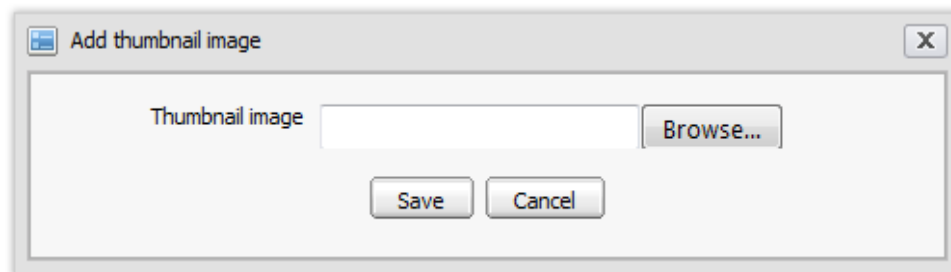
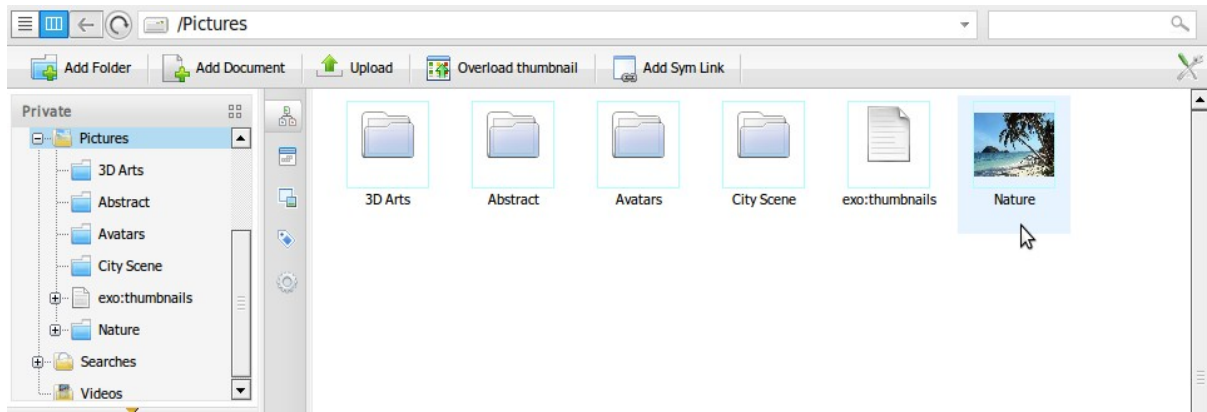


Illustration 61: The Add thumbnail image form

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.



4.6.4.19 Approve Content

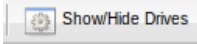
4.6.4.20 Publish Content

4.6.4.21 Request Approval

4.6.4.22 Show Drives

This function enables you to show or hide all the drives in Sites Explorer.

To show drives, click  on the action bar.

To hide drives, click click  on the action bar again.

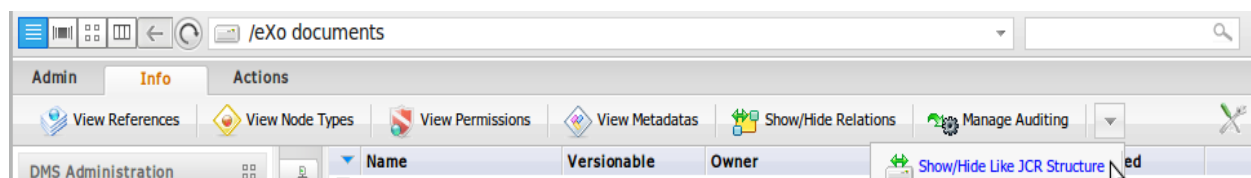
4.6.4.23 Show JCS Structure

This function allows you to view nodes in documents in the form tree structure


- ✓ To show like JCR Structure, do as follows:

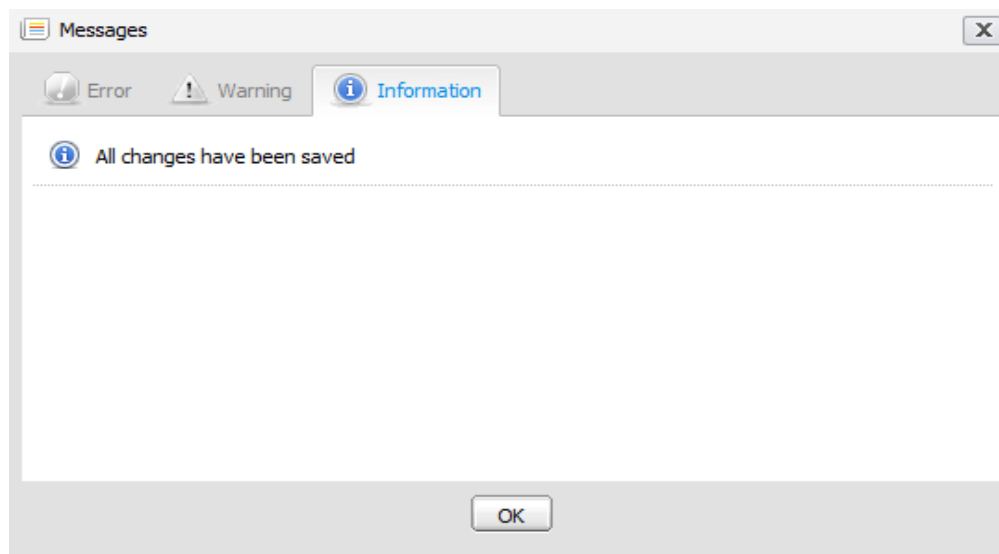
Step 1: Select a document that you want to show like JCR Structure

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  Show/Hide Like JCR Structure again.

4.6.4.24 Tag Document

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: Click  Tagging this document on the Action bar. The **Tag Manager** will be displayed:

Illustration 62: 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.

4.6.4.25 Upload

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:

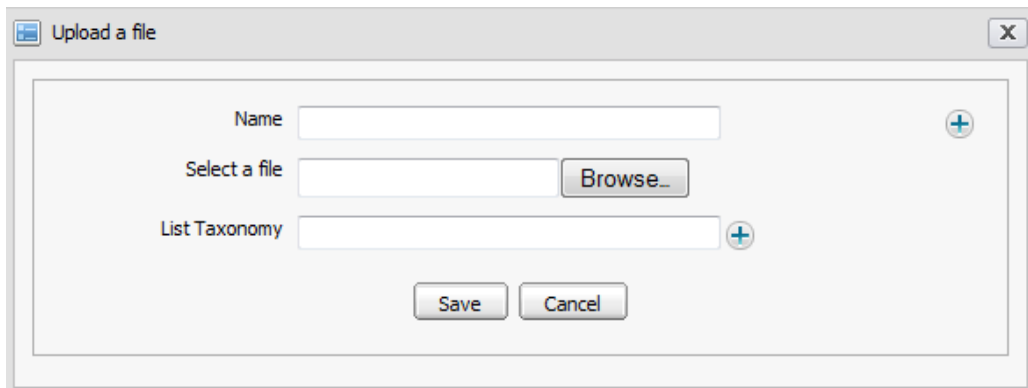




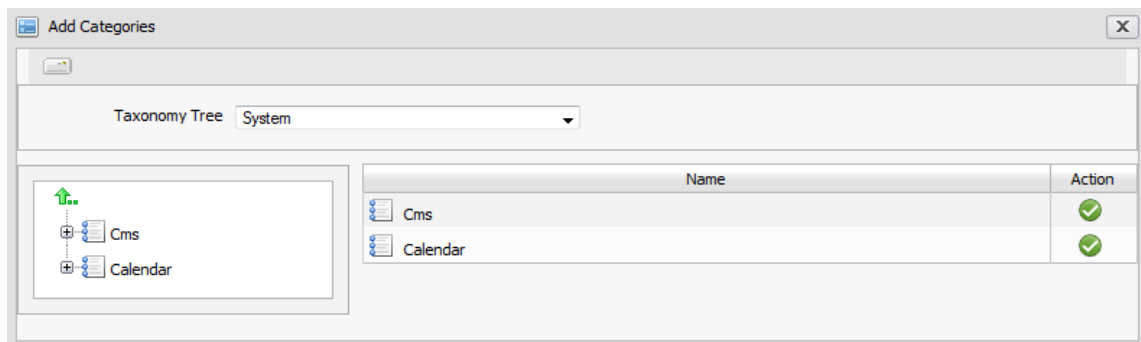
Illustration 63: The Upload a file form



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 64: 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:

| Uploaded file | | | | | |
|---|------------------|------------------|-----------|--------------------|---|
| | 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.

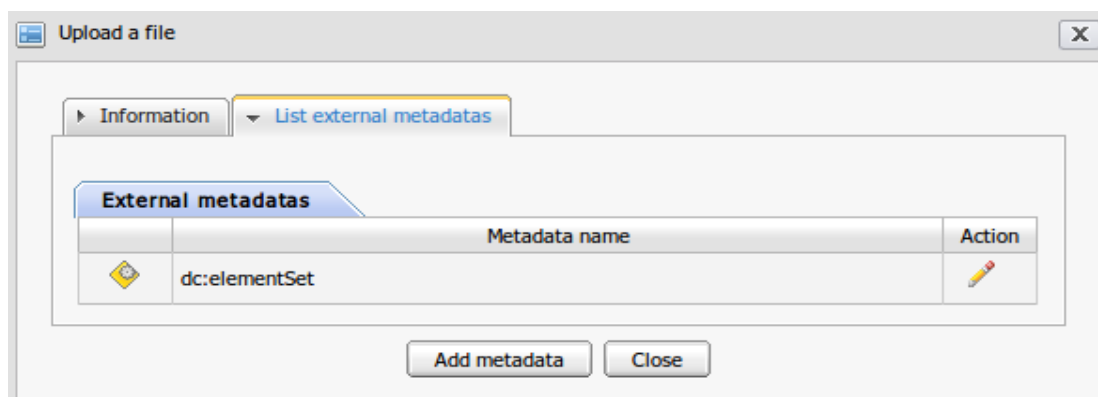


Illustration 65: The Upload a file form

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.

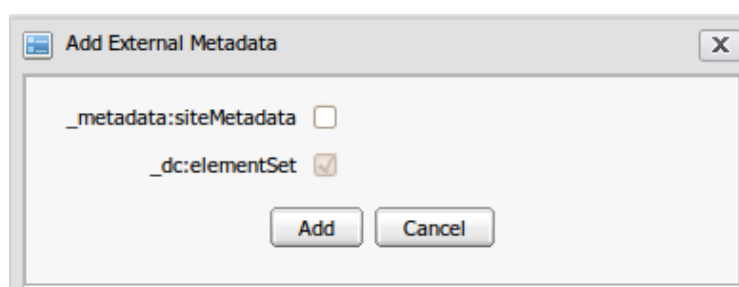
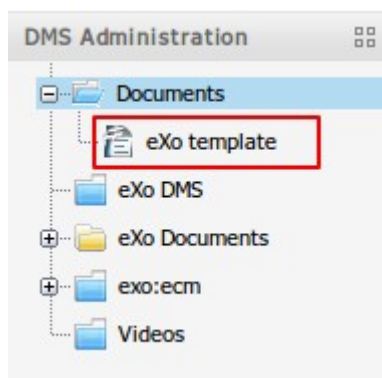


Illustration 66: The Add External Metadata form

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 multi 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.

4.6.4.26 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:

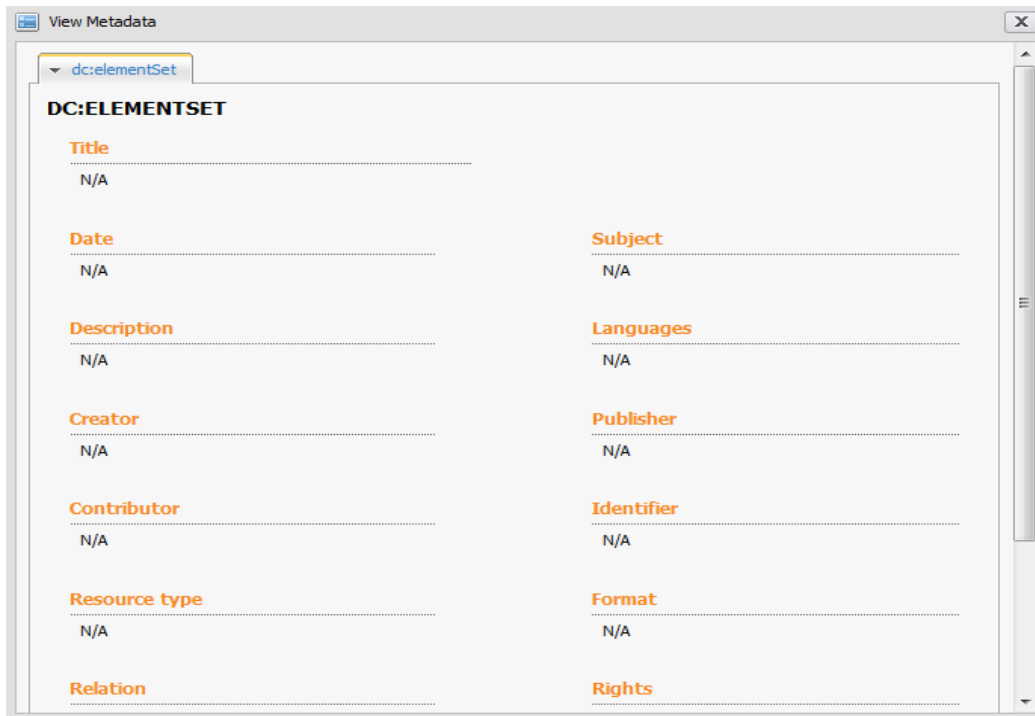
Step 1: Select a nt:file node.

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

Step 3: Click



to open the **View Metadata** form:

A screenshot of a web application window titled "View Metadata". The window has a tab labeled "dc:elementSet". Below the tab, the text "DC:ELEMENTSET" is displayed. The form is organized into two columns of metadata fields. Each field has a label in orange text, a dotted line for input, and the value "N/A". The fields are: Title, Date, Description, Creator, Contributor, Resource type, Relation, Subject, Languages, Publisher, Identifier, Format, and Rights. A vertical scrollbar is visible on the right side of the form.

| DC:ELEMENTSET | |
|---------------|-----|
| Title | N/A |
| Date | N/A |
| Description | N/A |
| Creator | N/A |
| Contributor | N/A |
| Resource type | N/A |
| Relation | N/A |
| Subject | N/A |
| Languages | N/A |
| Publisher | N/A |
| Identifier | N/A |
| Format | N/A |
| Rights | N/A |

Illustration 67: 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.

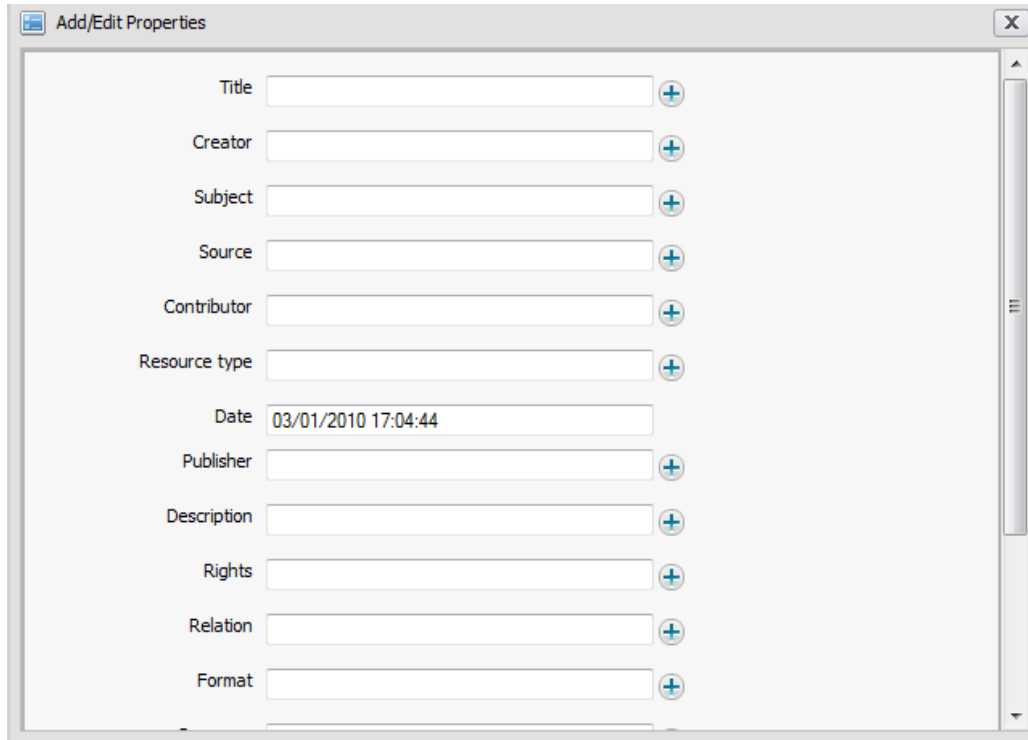



Illustration 68: The Add/Edit Properties form

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.

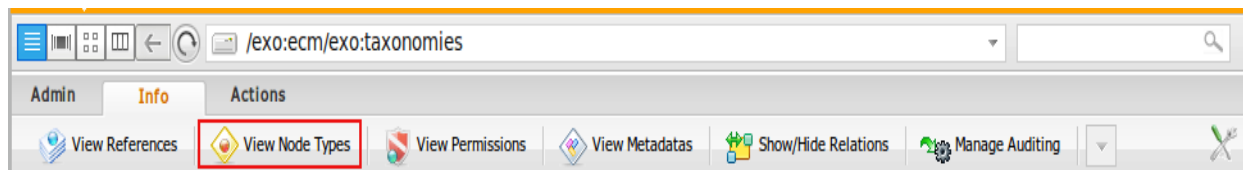
4.6.4.27 View Node Type


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  **View Node Types** to view detailed information of the selected node.
The **Node type information** form appears:

 A screenshot of the 'Node Type Information' form. The form has a tabbed interface with tabs for 'exo:article', 'exo:modify', 'exo:datetime', 'exo:owneable', 'mix:votable', and 'mix:commentable'. The 'exo:article' tab is selected. Below the tabs is a table with the following data:

| Name | Primary Item Name | Parent types | Mixin Node Type | Orderable Children |
|-------------|-------------------|--|-----------------|--------------------|
| exo:article | N/A | mix:referenceable exo:rss-enable nt:base | ✗ false | ✗ false |

 Below this table is a section titled 'Node Property Definition' with a table:

| 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 | | |

 Below this is a section titled 'Child Node Definition' with a table:

| Name | OPV | MAN | PR | AC | DNT |
|------|------|---------|---------|---------|-------------|
| * | COPY | ✗ false | ✗ false | ✗ false | exo:article |

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

Illustration 69: The Node Type Information form

Step 4: Click each tab to view information of the node type.

4.6.4.28 View Permissions


This function allows Administrator to establish the right for each node, however other users can view permissions of a node.

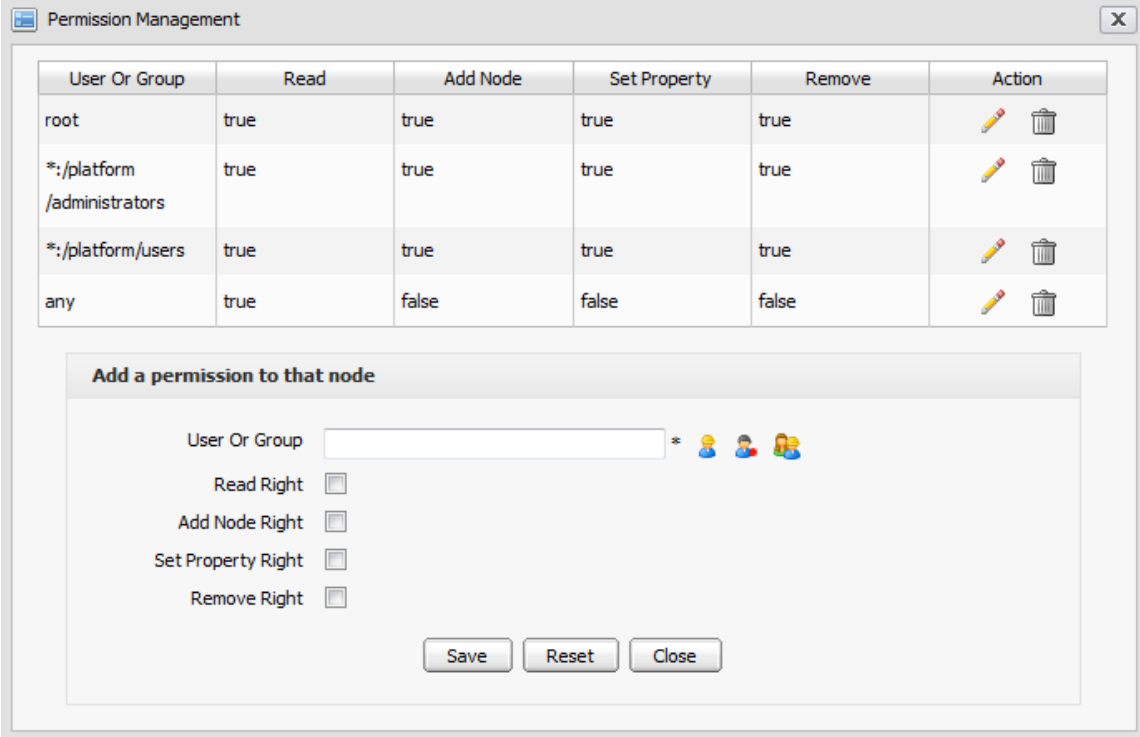
View permissions of a node

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  on the Action bar to show the **Permission Management** form:



The screenshot shows the 'Permission Management' window. 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 'User Or Group' input field, a list of permissions with checkboxes, and '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 70: 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.


Add permissions for a node

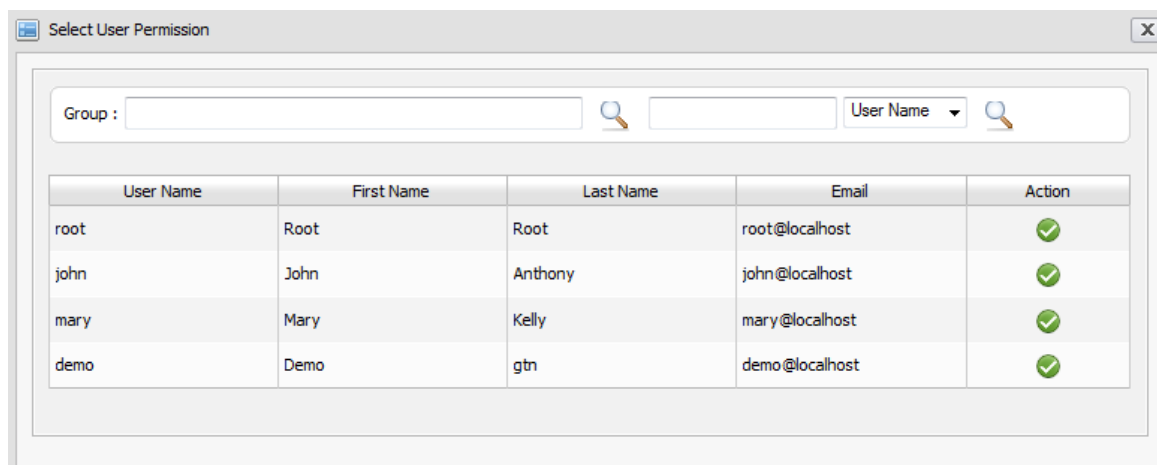
Do the following steps to add permission for a node:

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  on the **Action** bar.


Step 4: Show the **Select User Permission** form by clicking the icon  next to the **User Or Group** field:



The 'Select User Permission' form features a search bar at the top with a 'Group' input field, a magnifying glass icon, and a 'User Name' dropdown menu with another magnifying glass icon. Below the search bar is a table with five columns: 'User Name', 'First Name', 'Last Name', 'Email', and 'Action'. The table contains four rows of user data, each with 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 | ✓ |

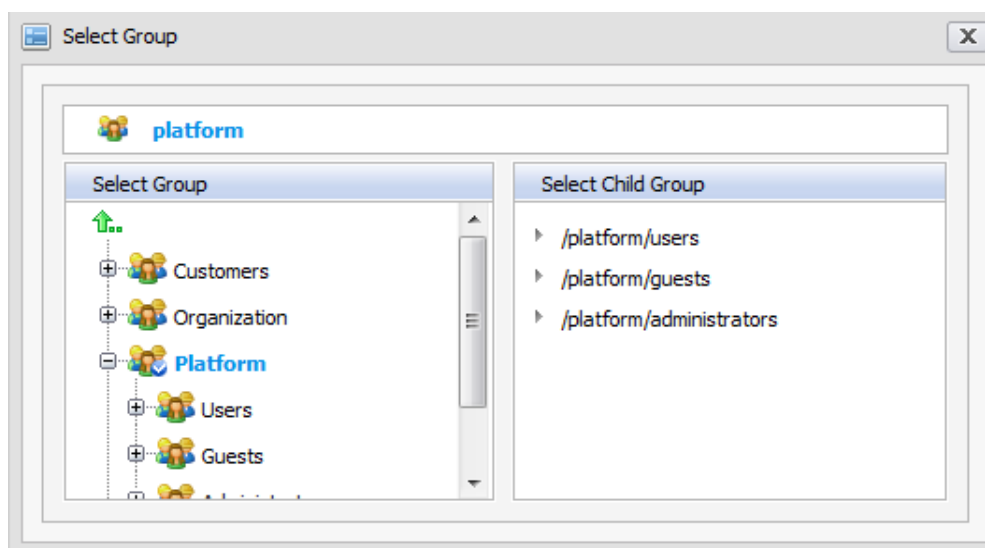
Illustration 71: Select User Permission form

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 'Select Group' form displays a hierarchical tree structure on the left panel under the heading 'Select Group'. The tree shows a 'platform' group with sub-groups: 'Customers', 'Organization', 'Platform' (selected), 'Users', and 'Guests'. On the right panel, 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.

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.

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.


4.6.4.29 View Properties

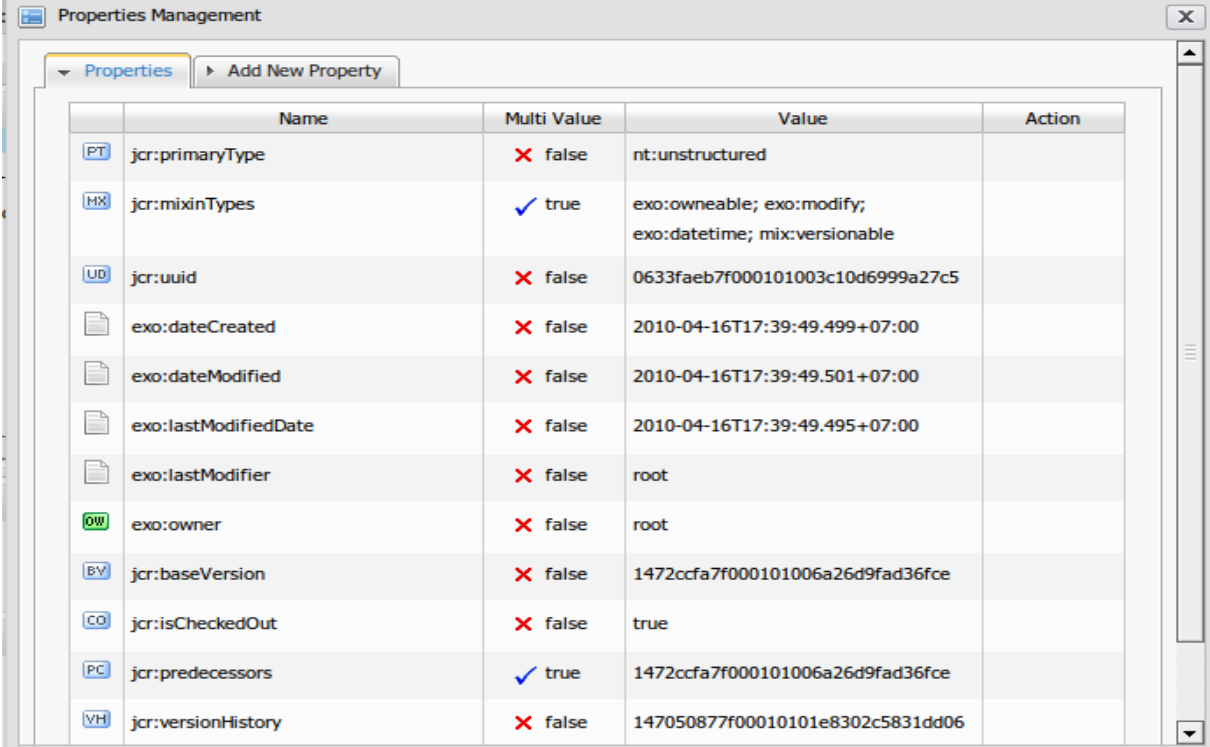
This function enables you to view all properties and values of a node. In addition, it is also used to add more properties for the node.

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:



The screenshot shows a window titled "Properties Management" with a tab labeled "Properties" and a button "Add New Property". Below is a table with the following data:

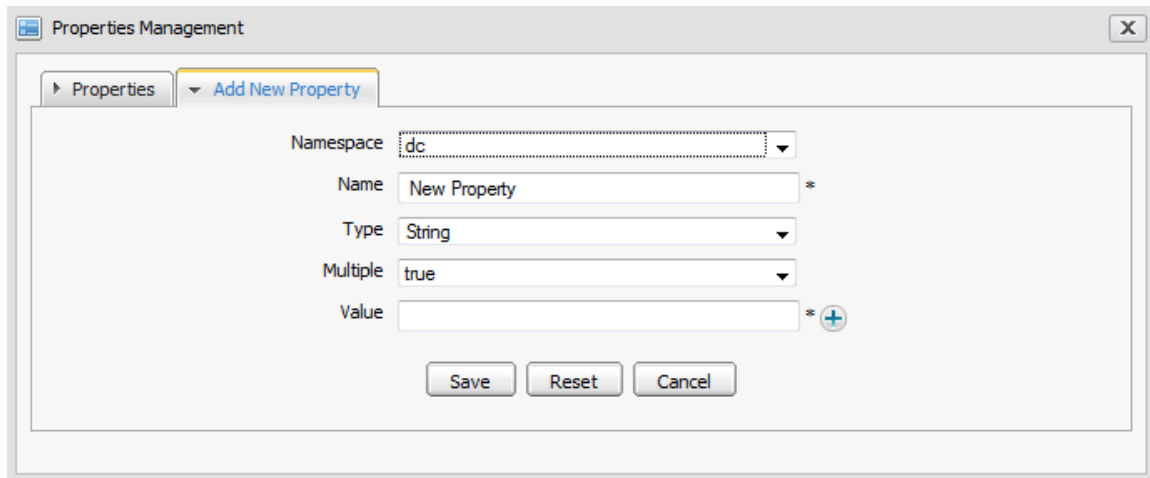
| | Name | Multi Value | Value | Action |
|----|----------------------|-------------|--|--------|
| PT | jcr:primaryType | ✗ false | nt:unstructured | |
| MX | jcr:mixinTypes | ✓ true | exo:owneable; exo:modify; exo:datetime; mix:versionable | |
| UD | jcr:uuid | ✗ false | 0633faeb7f000101003c10d6999a27c5 | |
| | 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 | |
| OW | exo:owner | ✗ false | root | |
| BV | jcr:baseVersion | ✗ false | 1472ccfa7f000101006a26d9fad36fce | |
| CO | jcr:isCheckedOut | ✗ false | true | |
| PC | jcr:predecessors | ✓ true | 1472ccfa7f000101006a26d9fad36fce | |
| VH | jcr:versionHistory | ✗ false | 147050877f00010101e8302c5831dd06 | |

Illustration 72: 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 a window titled "Properties Management" with a close button (X) in the top right corner. Inside the window, there are two tabs: "Properties" and "Add New Property". The "Add New Property" tab is active. It contains the following fields and controls:

- Namespace:** A dropdown menu with "dc" selected.
- Name:** A text input field containing "New Property". To its right is an asterisk (*).
- Type:** A dropdown menu with "String" selected.
- Multiple:** A dropdown menu with "true" selected.
- Value:** A text input field. To its right is an asterisk (*) and a plus icon (+) in a circle.
- Buttons:** "Save", "Reset", and "Cancel" buttons are located at the bottom of the form.



Illustration 73: 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.

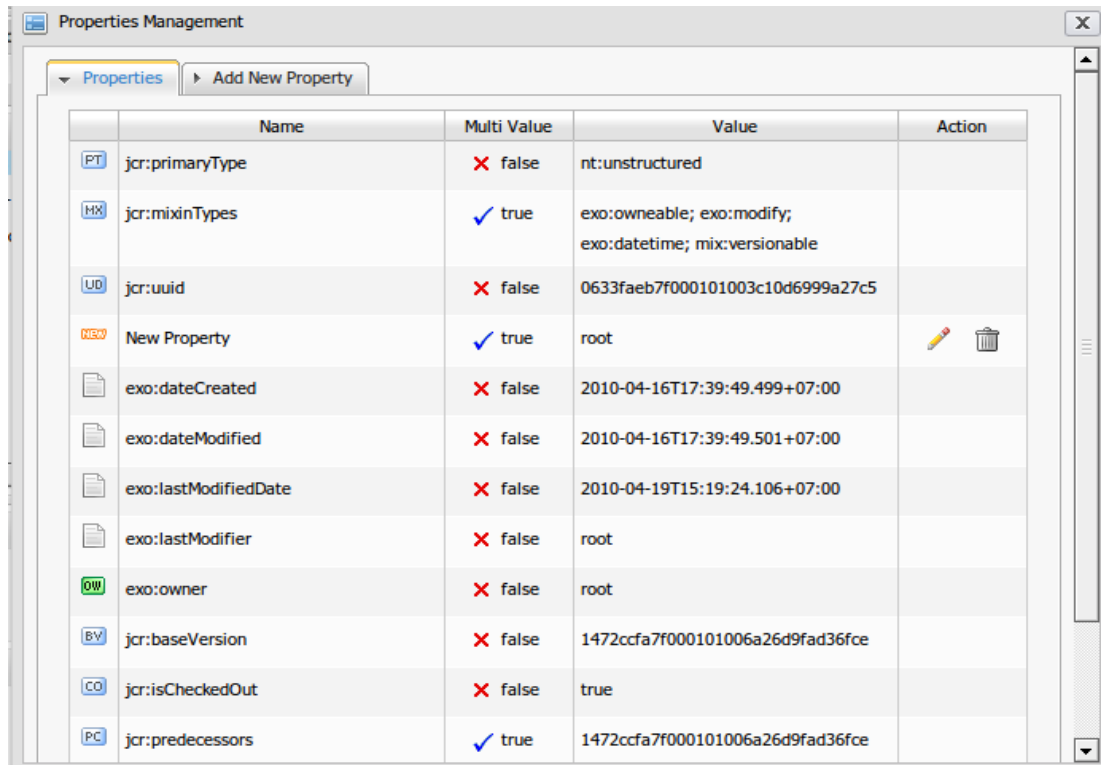
Step 7: Select a type for a property:





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:



The screenshot shows a 'Properties Management' window with a 'Properties' tab. It contains a table with the following data:

| | Name | Multi Value | Value | Action |
|-----|----------------------|-------------|--|---|
| PT | jcr:primaryType | ✗ false | nt:unstructured | |
| HX | jcr:mixinTypes | ✓ true | exo:owneable; exo:modify; exo:datetime; mix:versionable | |
| UD | jcr:uuid | ✗ false | 0633faeb7f000101003c10d6999a27c5 | |
| NEW | New Property | ✓ true | root |   |
| | 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 | 2010-04-19T15:19:24.106+07:00 | |
| | exo:lastModifier | ✗ false | root | |
| OW | exo:owner | ✗ false | root | |
| BV | jcr:baseVersion | ✗ false | 1472ccfa7f000101006a26d9fad36fce | |
| CO | jcr:isCheckedOut | ✗ false | true | |
| PC | jcr:predecessors | ✓ true | 1472ccfa7f000101006a26d9fad36fce | |

In this tab, you can:

Edit the added property clicking  in the Action column; or

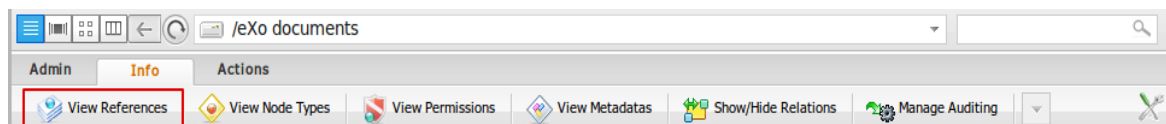
Delete the added property clicking .

4.6.4.30 View References


Do the following steps to view referenced documents:

Step 1: Select a node which is added to a category.

Step 2: Select **Details** view --> the **Info** tab to show the **View References** action.



Step 3: Select a category.

Step 4: Click  View References on the Action bar to show the References List form. This form will list the the path to each document in the selected category.

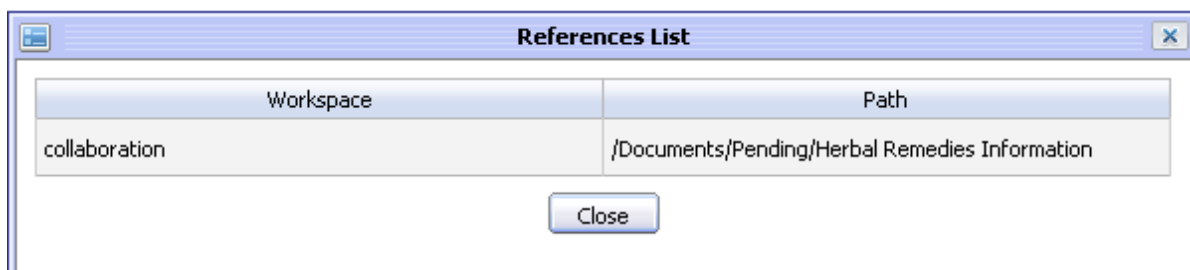



Illustration 74: The References List Form

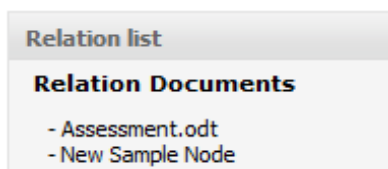
4.6.4.31 View Relations

This function enables you to view the relations of documents. Do as the following steps to show/hide relations:

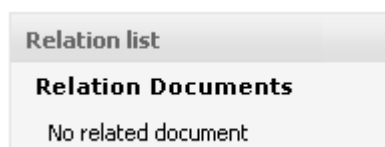
Step 1: Select a node that you want to view relations.

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 the sidebar, it shows “**No related document**” like:



Step 4: Click  Show/Hide Relations again to hide relations.

4.6.4.32 Vote

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: Click  Vote for document on the action bar:

The **Vote Document** form will appear:

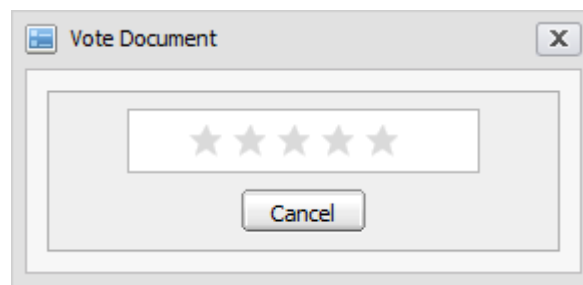
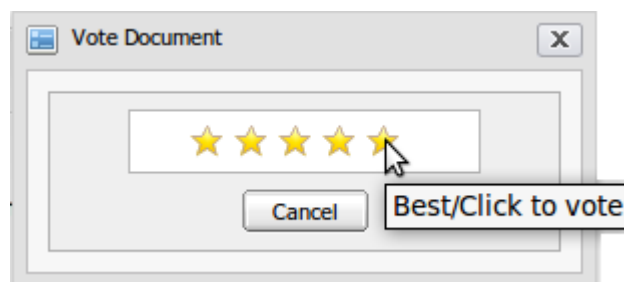
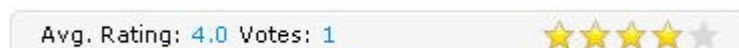


Illustration 75: The Vote Document form

Step 3: 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:



4.6.4.33 Watch Document

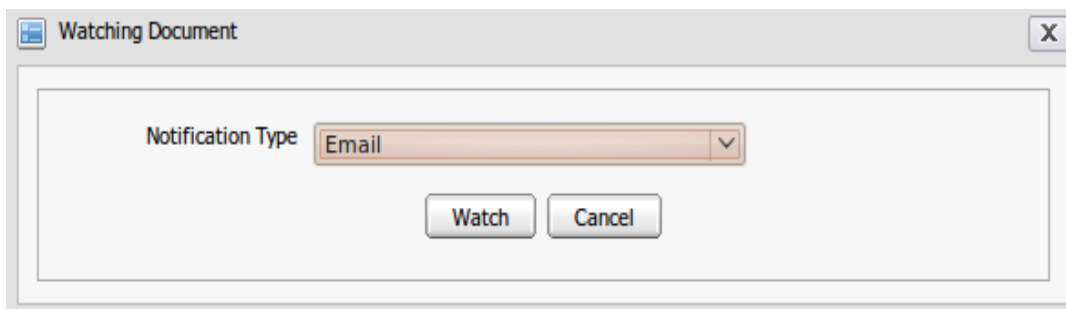
By using this function, whenever a change is made on the document, there will be a notification message sent to your email address. To receive that email, you must configure in your mail server.


✓ To start receiving an email notification do as follows:

Step 1: Select the document.

Step 2: Click  on the the action bar.

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

A screenshot of a dialog box titled "Watching Document". Inside the dialog, there is a label "Notification Type" followed by a dropdown menu showing "Email". Below the dropdown are two buttons: "Watch" and "Cancel".

- ✓ 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.

4.6.5 Manage Content in Sites Explorer

4.6.5.1 Create a document

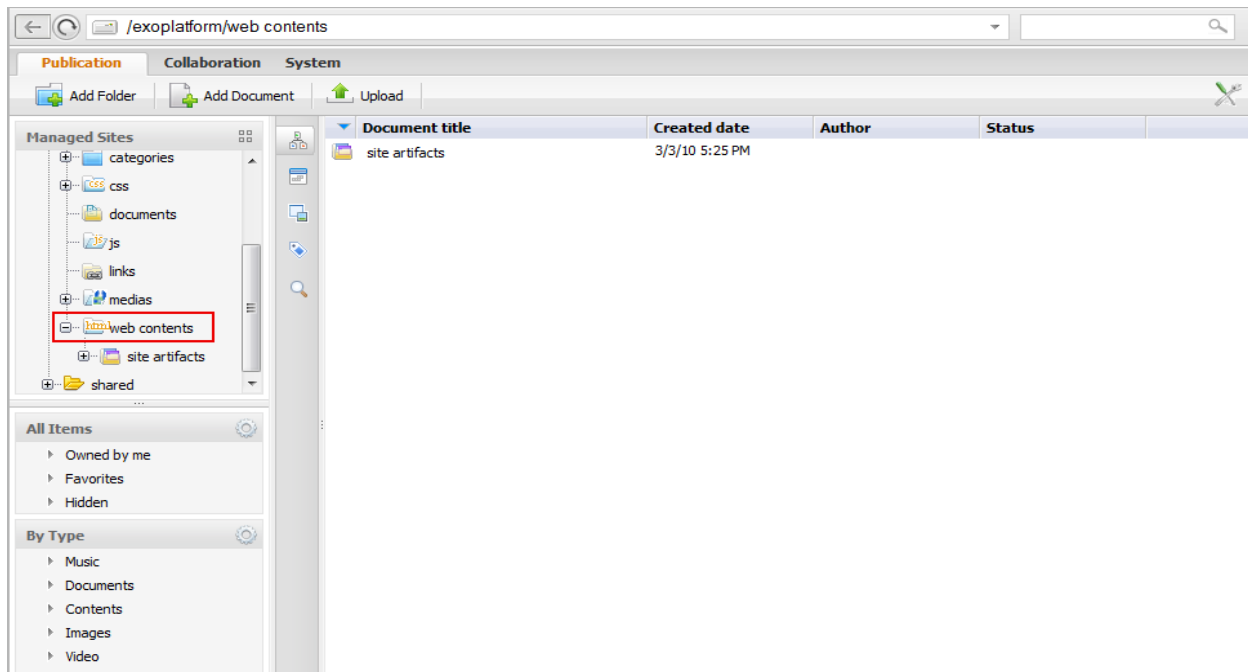
A web content is a key resource to make a site. Other resources make a site more dynamic and animated by using layout, color, font, etc. This section focuses on how to manage a web content.

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

Do as follows:


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 76: 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.

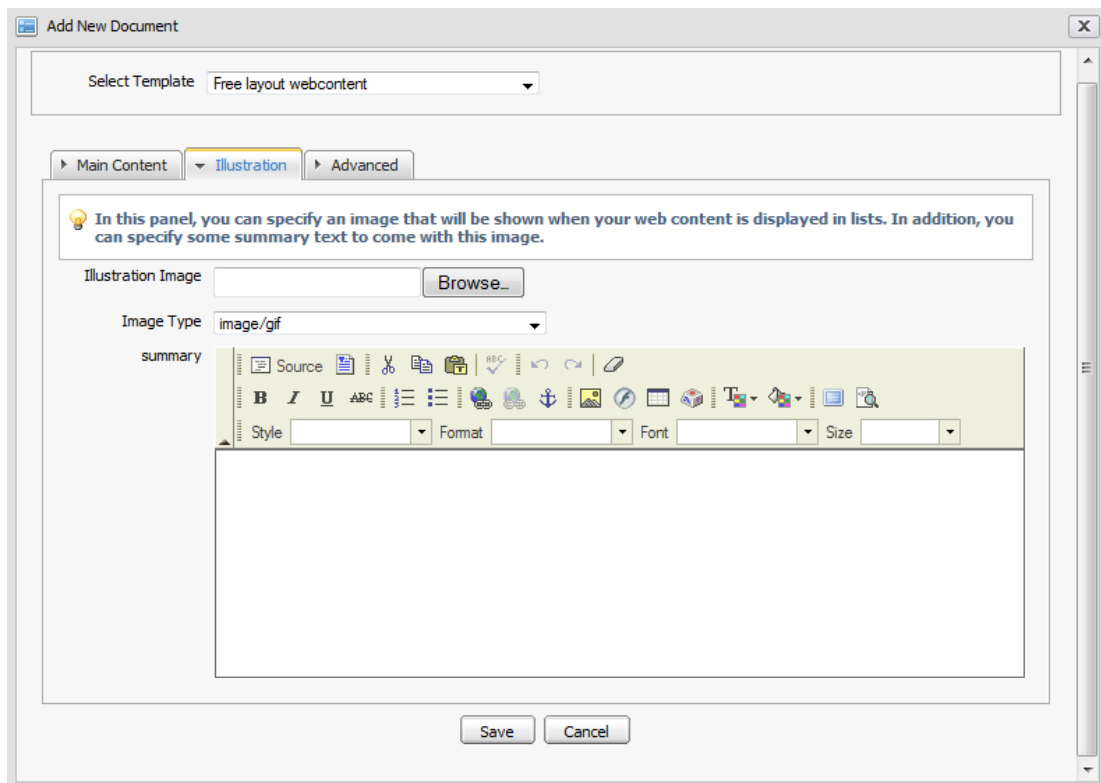



Illustration 77: The Illustration tab in the Add New Document form

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:

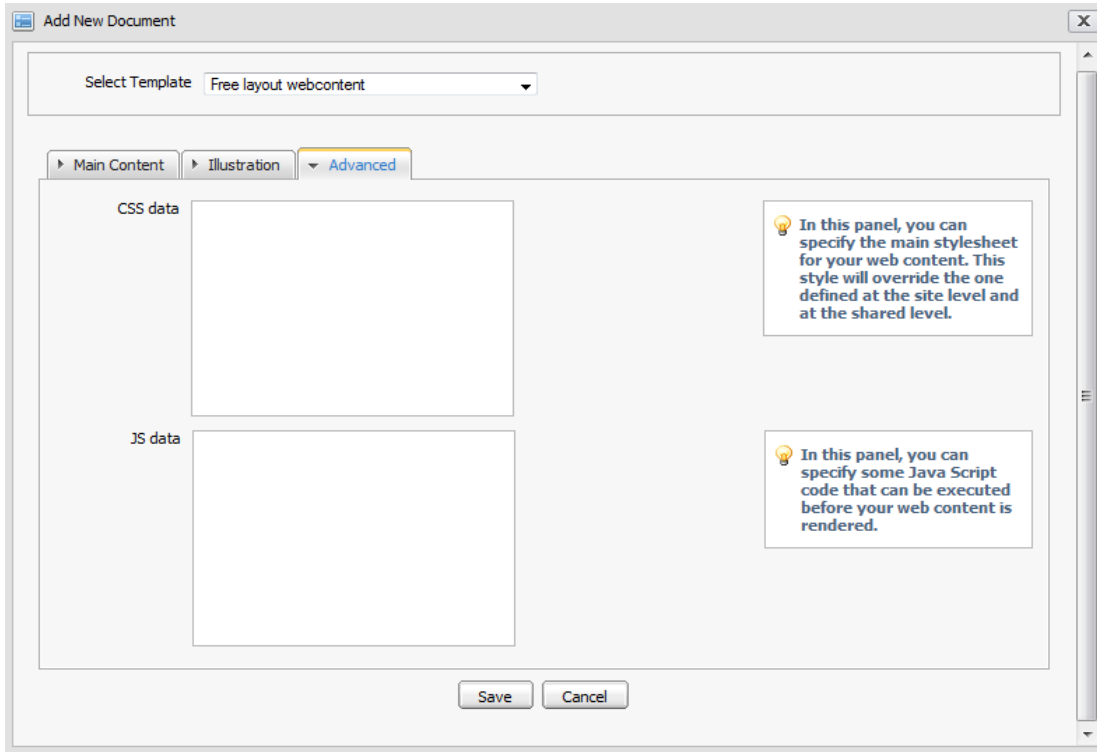


Illustration 78: The Advanced tab in the Add New Document form

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**

4.6.5.2 Edit a web content


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

Do as follows:

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**.



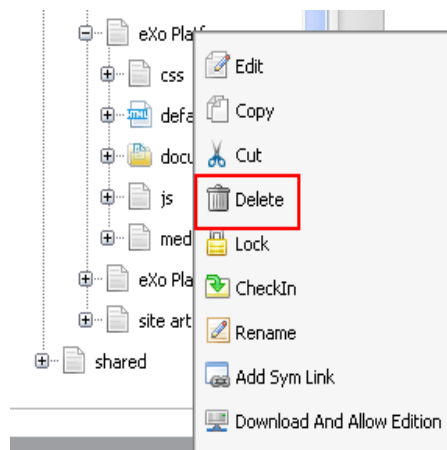
When you click  **Edit Document**, the web-content will be auto-locked for your editing. After finishing, the content is back to unlock status. You can manage Locks in the WCM Admin portlet.

4.6.5.3 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 as follows:

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.


4.6.5.4 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 as follows:

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  **Manage Publications** on the Action bar:

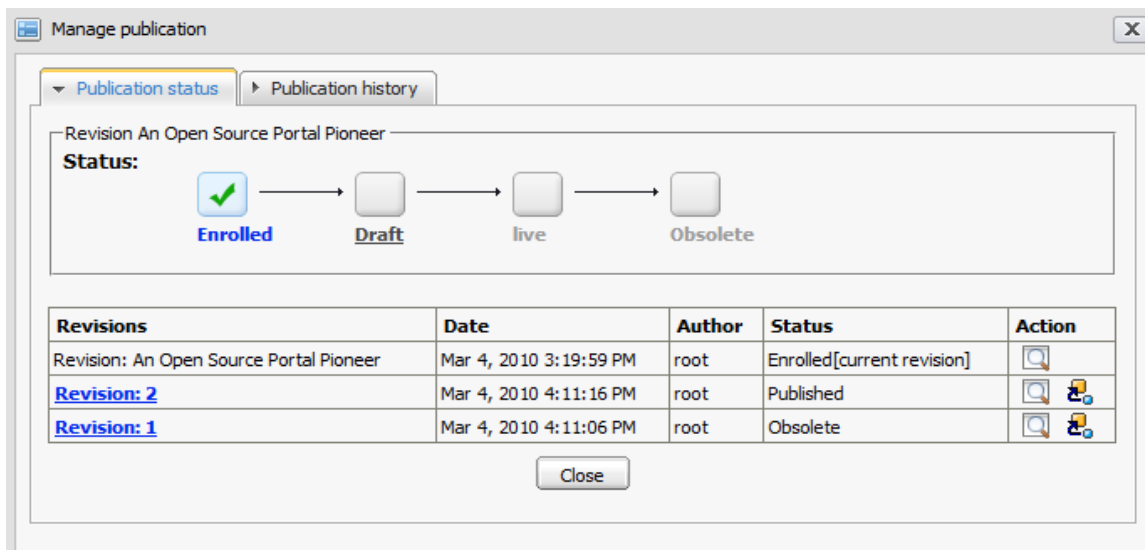


Illustration 79: The Manage publication form

■ 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.

Manage publication

Publication status | Publication history

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 80: 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:

Manage publication

Publication status | Publication history

| 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 81: 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.


4.6.6 Actions on Folders & Document

4.6.6.1 Add to favorite

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

To add a node as your favorite, follow these step:\

Step 1: Right-click the node that you want to add it as favorite.

Step 2: Select  **Add to favorite** from the menu.

There will be a symlink of your favorite nodes (folders, documents, files) will be created in the **Favorite** folder.

4.6.6.2 Copy/Paste Folders and Documents

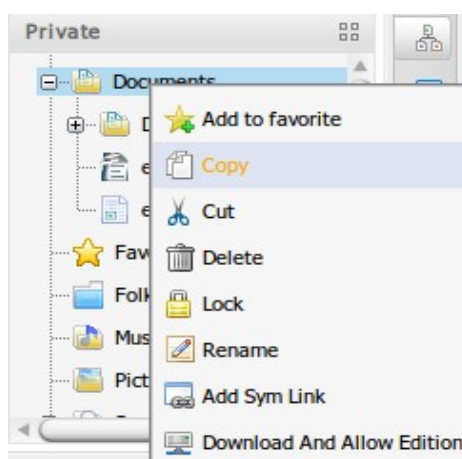
There are two ways to copy folders and documents to other places:

The 1st way: Copy/Paste folders and documents from the menu

Do as follows:

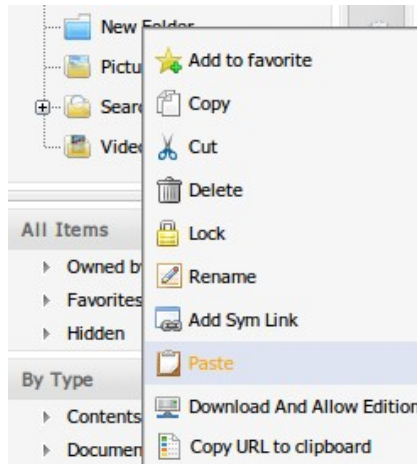
Step 1: Select a folder / document that you want to copy on the left or right panel.

Step 2: Right-click the selected folder/ document 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) or document will be pasted to the new selected path.

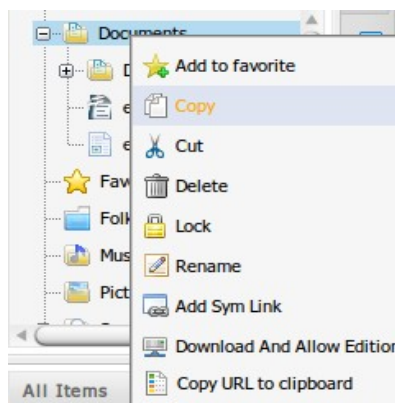


- You only can take the **Copy** action if you have a right on the source node.
- You only can take the **Paste** action if you have a right on the destination node.
- If the destination node has the same name with the copied node, after being pasted, the copy node will be added an index with its name. 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/ documents from the Clipboard

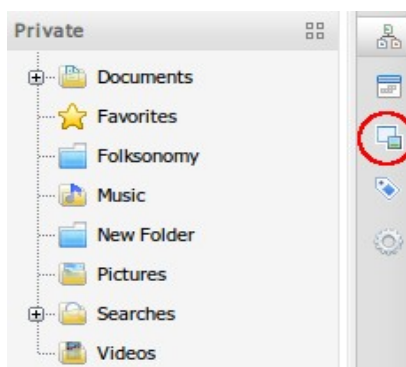
Do as follows:

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

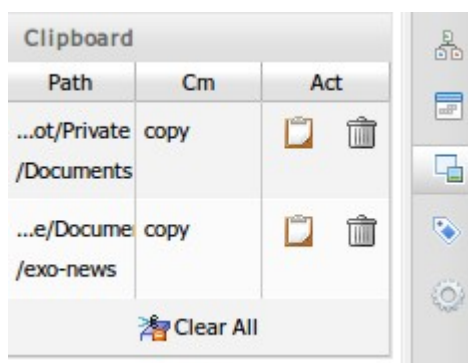


Step 2: Select a destination node that you want to make a copy.

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 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.

4.6.6.3 Edit folders/ documents

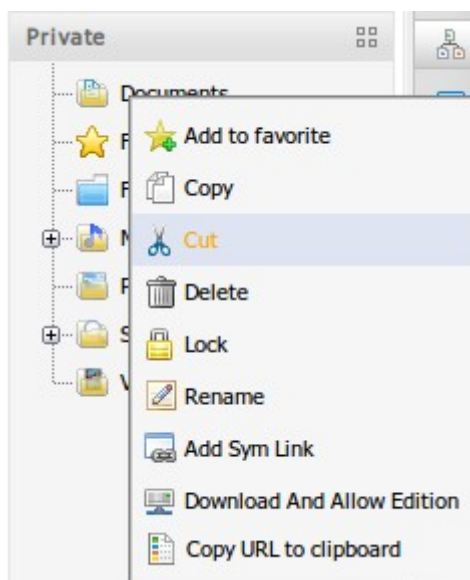
4.6.6.4 Cut/Paste folders and documents

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

The 1st way: Cut/Paste a folder/ document from the menu

Do as follows:

Step 1: Right-click a folder/document 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 a folder/ document from the Clipboard

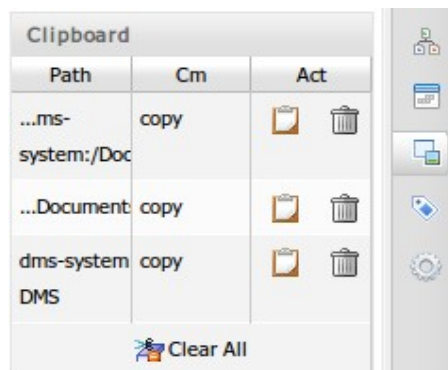
Do as follows:

Step 1: Right-click a folder/ document 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.

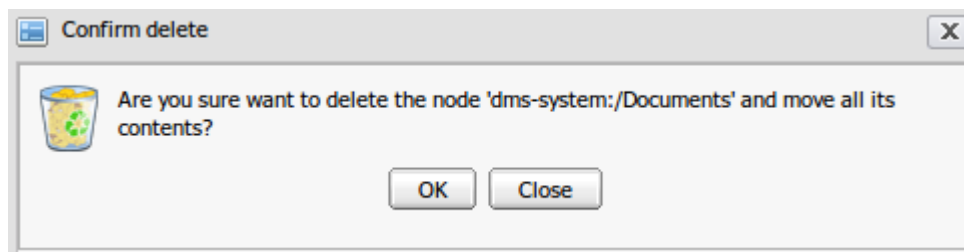
4.6.6.5 Delete folders and documents

This function helps you remove folders/ documents from their location easily.

Do as follows:

Step 1: Right-click a folder/ document 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.
- 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.

4.6.6.6 Drag and drop folders/ documents

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

Do as follows:

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

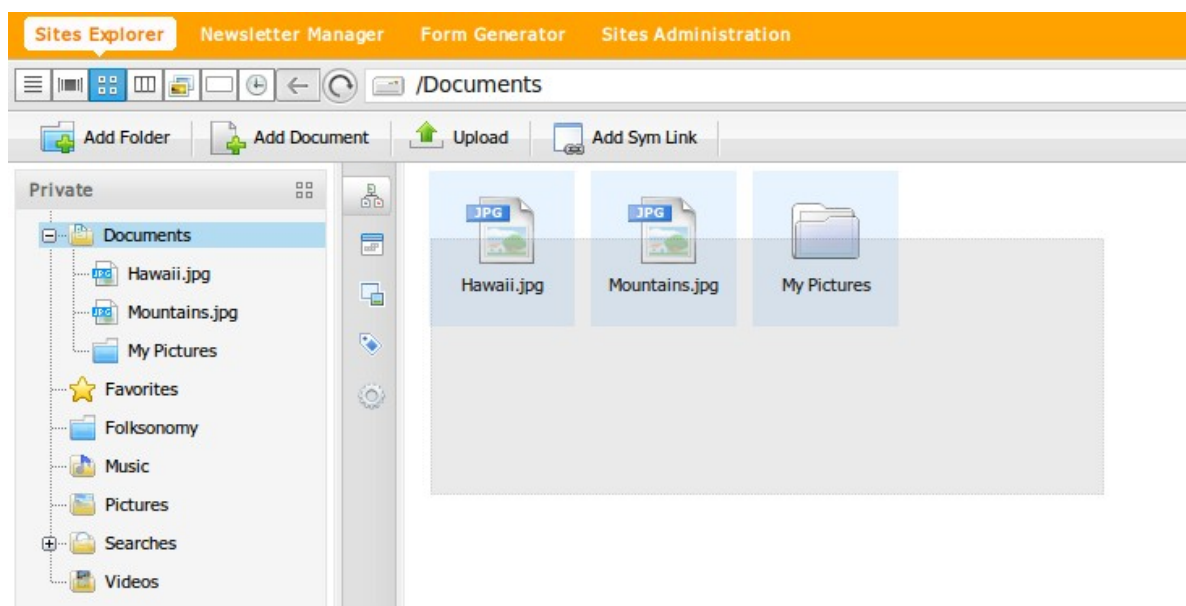


Illustration 82: Chose the folder you want to move on the right panel

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

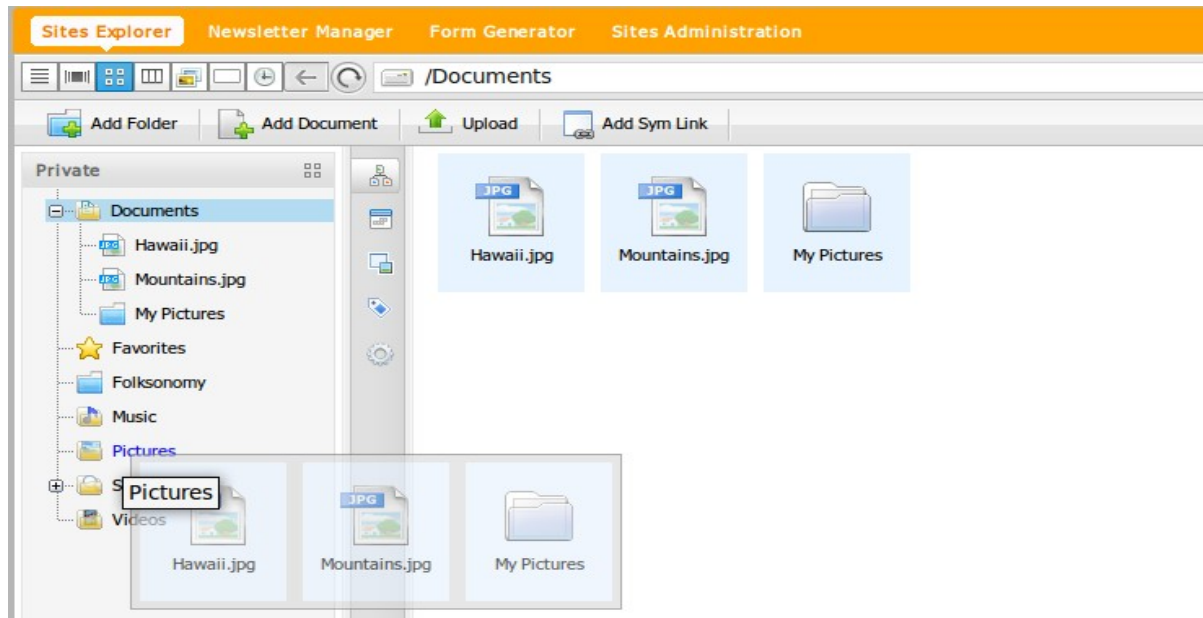


Illustration 83: Drag folder(s) to the new location in the left panel

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

4.6.6.7 Lock/Unlock folders and Documents

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

Lock folders/ documents

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

Step 2: Right-click the folder/document and select **Lock** from the menu. The selected folder/document 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/documents

To unlock a folder/document, right-click a locked folder/document and select the **Unlock** item in the menu.

The locked folder/document will be unlocked; thus others can take actions on it.

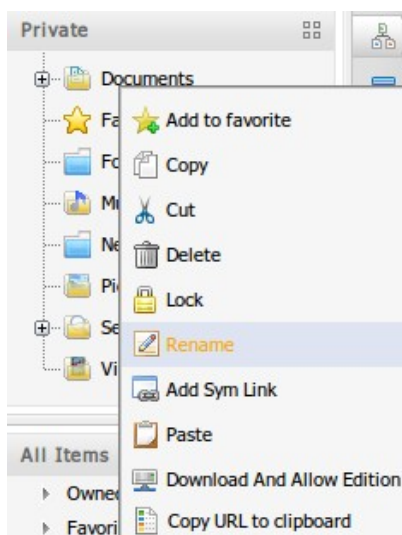
4.6.6.8 Rename folders and documents

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

Do as follows:

Step 1: Right-click a folder/ document that you want to rename.

Step 2: Select **Rename** from the menu:



The **Rename** form will appear:

Illustration 84: The Rename form

(*): *required*

Step 3: Input a new name in the **Name** field. You can also change the title by inputting a new one in the **Title** field.

Step 4: Complete renaming the folder/ document by clicking **Save**.

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



- Renaming a folder/document must follow rules of creating a new folder/document:
- Some special characters can not be used in the **Name** field (@ # % & * () " ' : ; [] { } / !).
- A folder/document name can be the same with the existing one. When a new folder/document is created while its name has been existing, after clicking **Save**, its name will be added an index (e.g: test[2]).

4.6.6.9 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.

4.6.6.10 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.

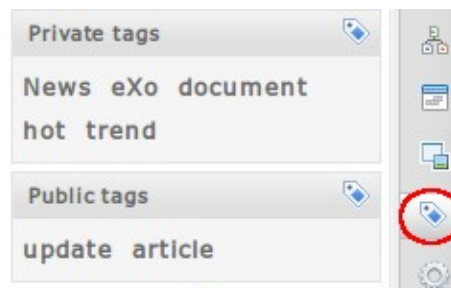
- *with 'Kofax':* like Article, by default, it does not list any folder. When Kofax has some actions or added language, etc all folders will be listed with name: exo:actions, languages, and more.

4.6.6.11 View Document

4.6.6.12 Copy URL to clipboard

4.6.6.13 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.



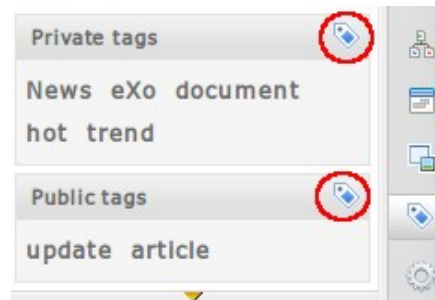
Depending on the popularity of tag, the displaying of each tag will be different from others by: font-size, font-weight, color, font-family, text-decoration. For example, when a tag is added for over 10 documents, it will be displayed in red color, size:20px, bold. This is also can be configured in WCM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

4.6.6.14 Manage tags

A user easily manages 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:

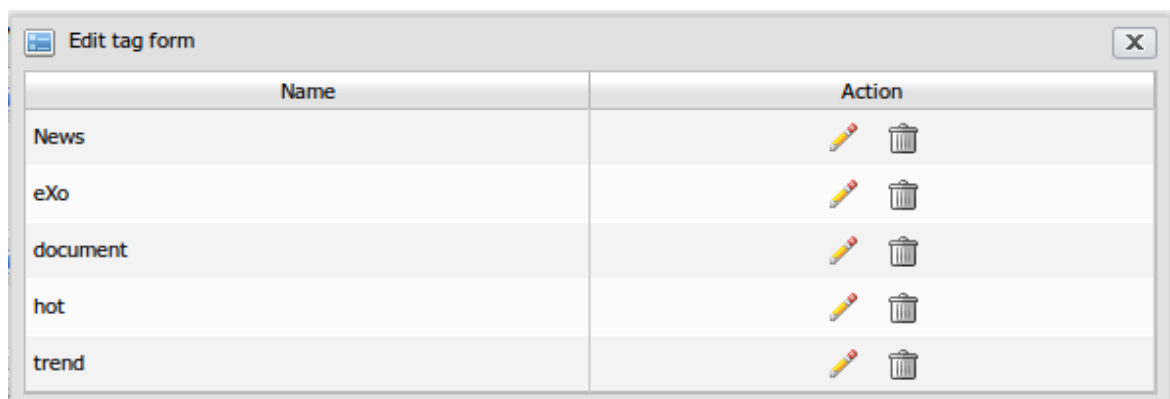


Illustration 85: The Edit tag form

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

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

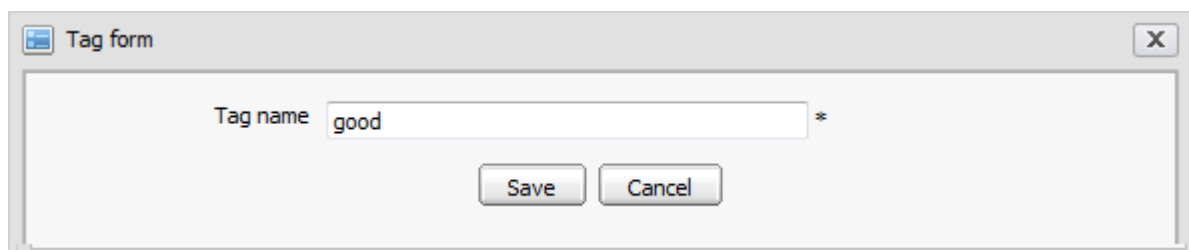

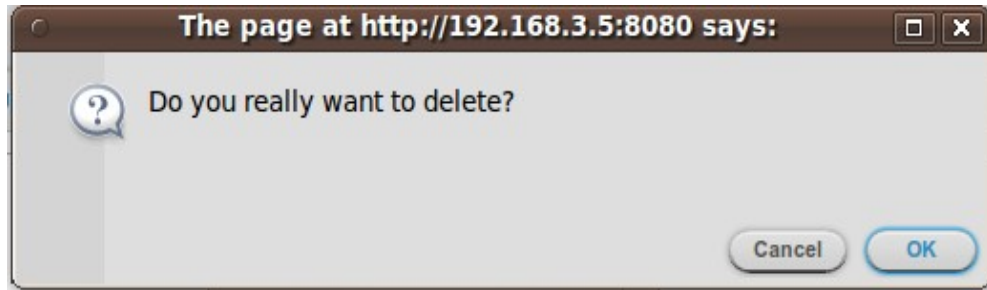


Illustration 86: The Tag form

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.

4.7 Manage Content by WebDAV

4.7.1 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.

4.7.2 Why 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, etc on 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.

4.7.3 How to use WebDAV in eXo Content?

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:

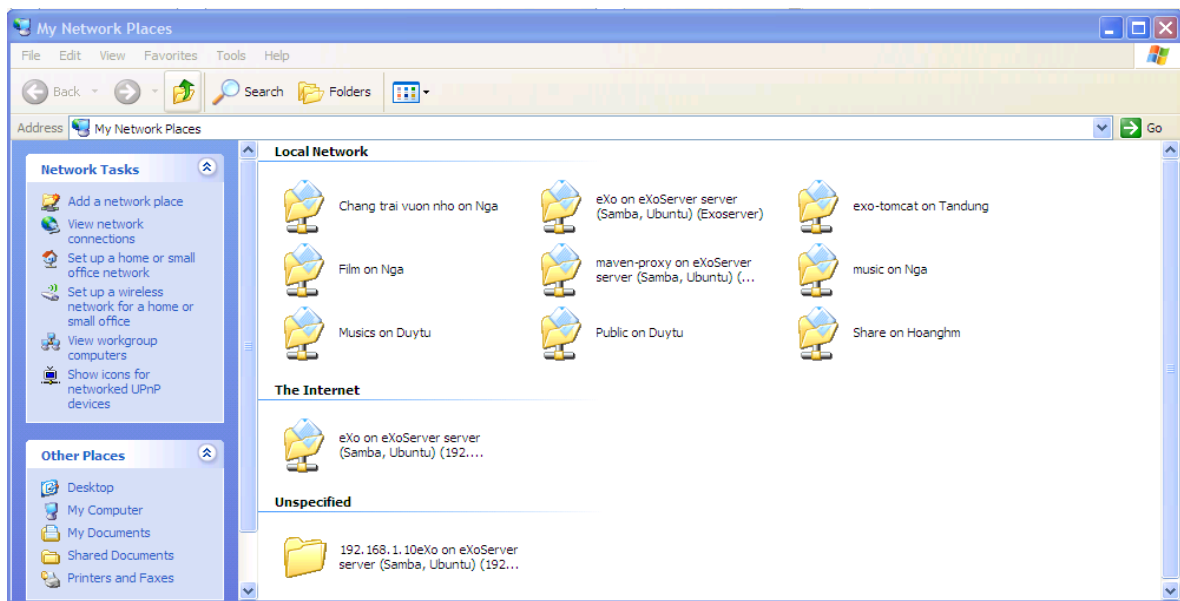


Illustration 87: Shared folders in My Network Places

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:

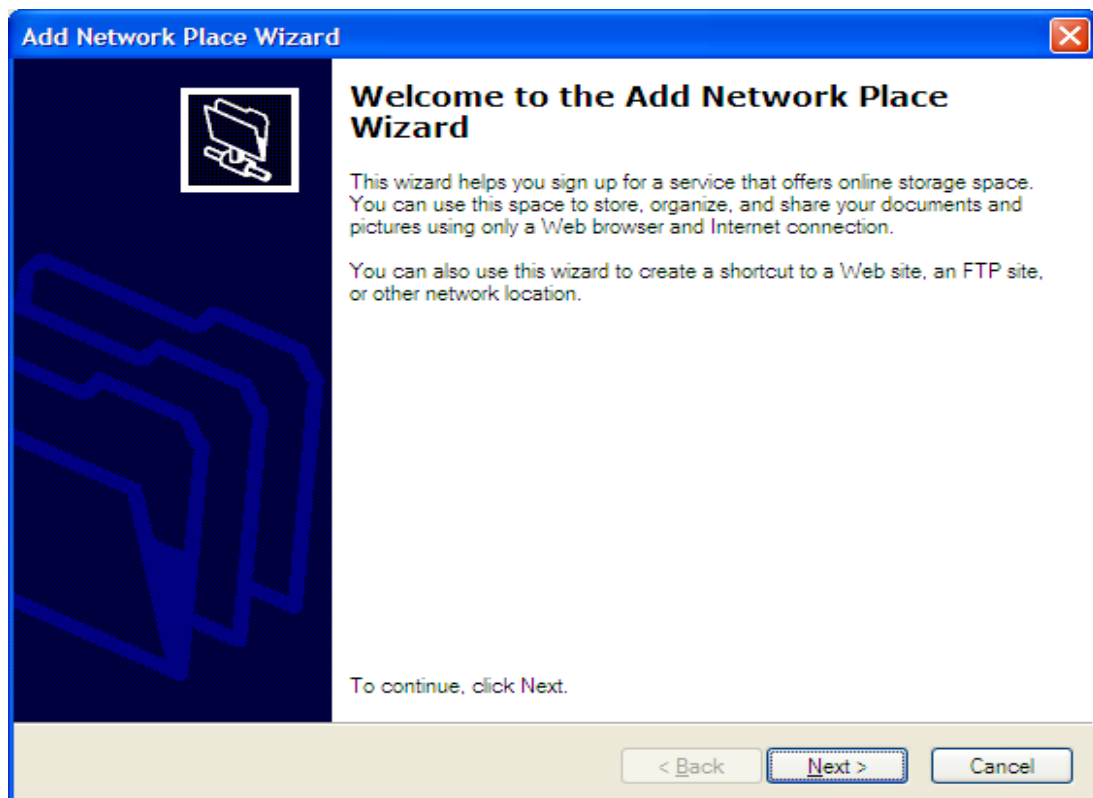


Illustration 88: The Add Network Place Wizard form

Click **Next** to open a form to choose the location that you want to create the network place:

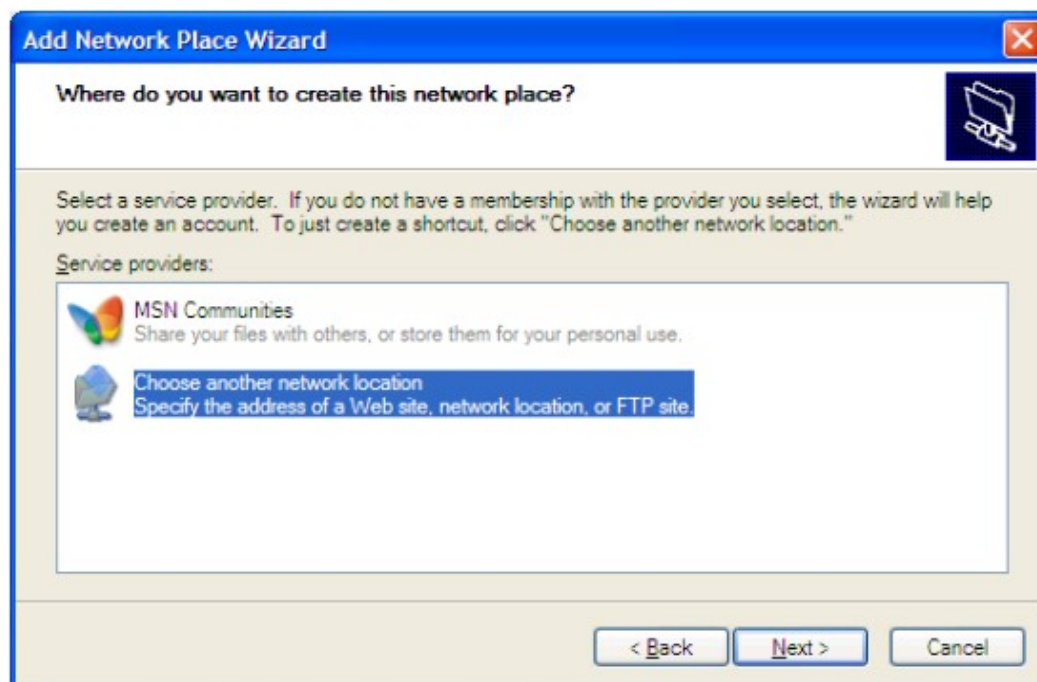


Illustration 89: The Add Network Place Wizard form

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.

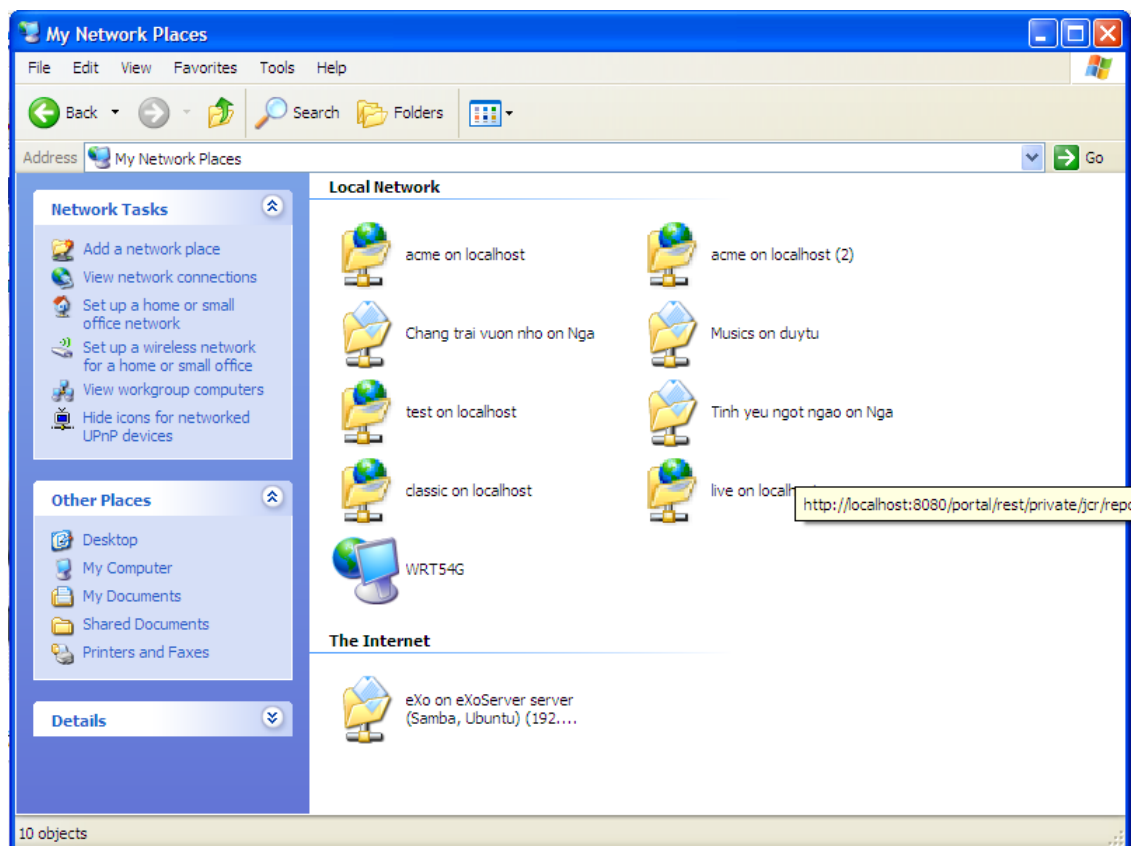


Illustration 90: My Network Places folder

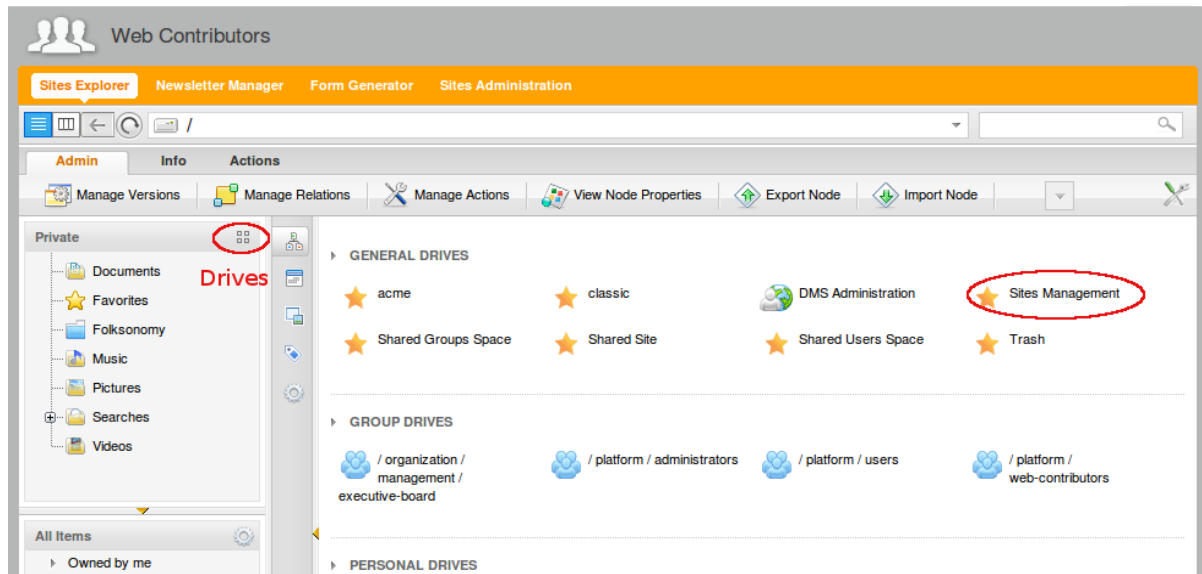
Go into the folder corresponding to the site which you want to take actions on it.

The 2nd way:

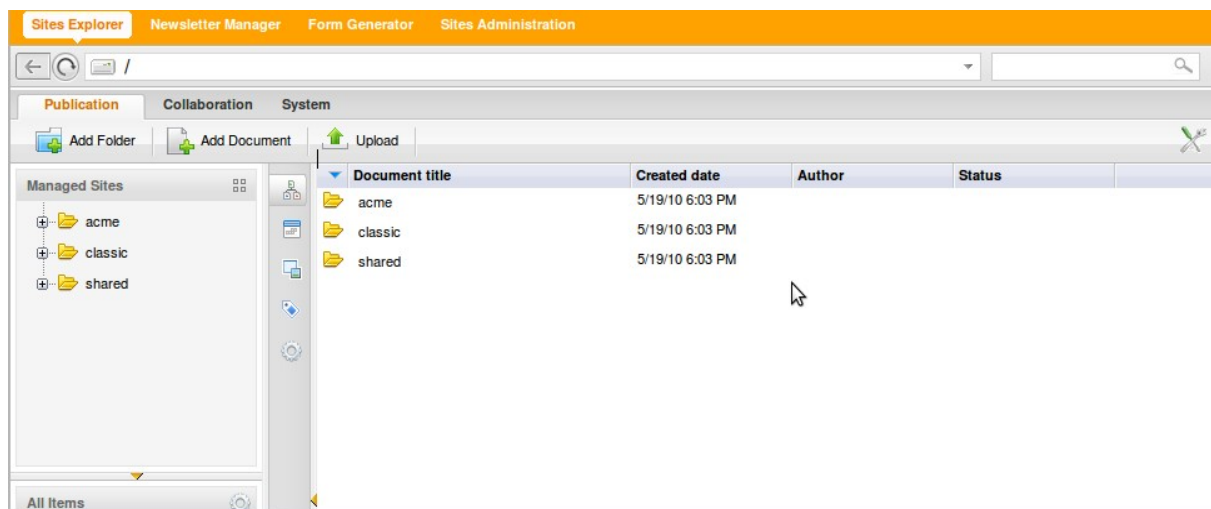
Step 1: Use the IE (Internet Explorer) browser to access <http://localhost:8080/portal>

Step 2: Select **Group | Sites Explorer** on the Administration bar.

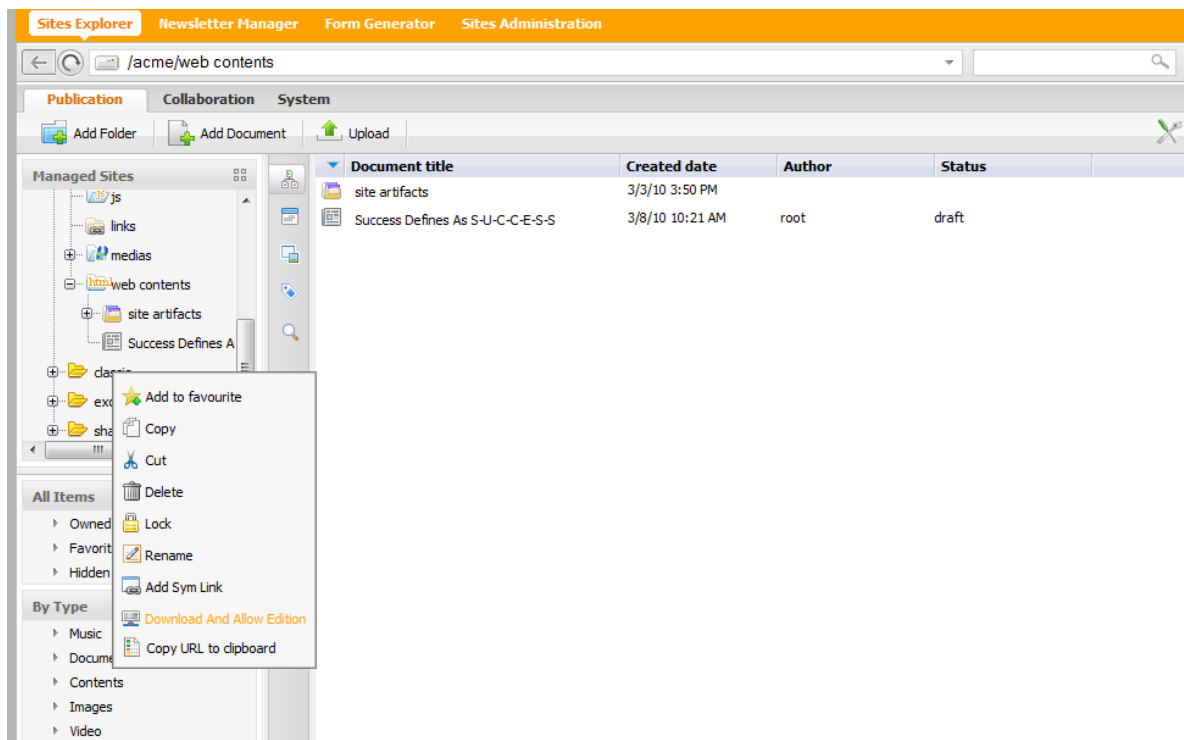
Step 3: Go to **Drive**, then select the **Sites Management** drive.



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.

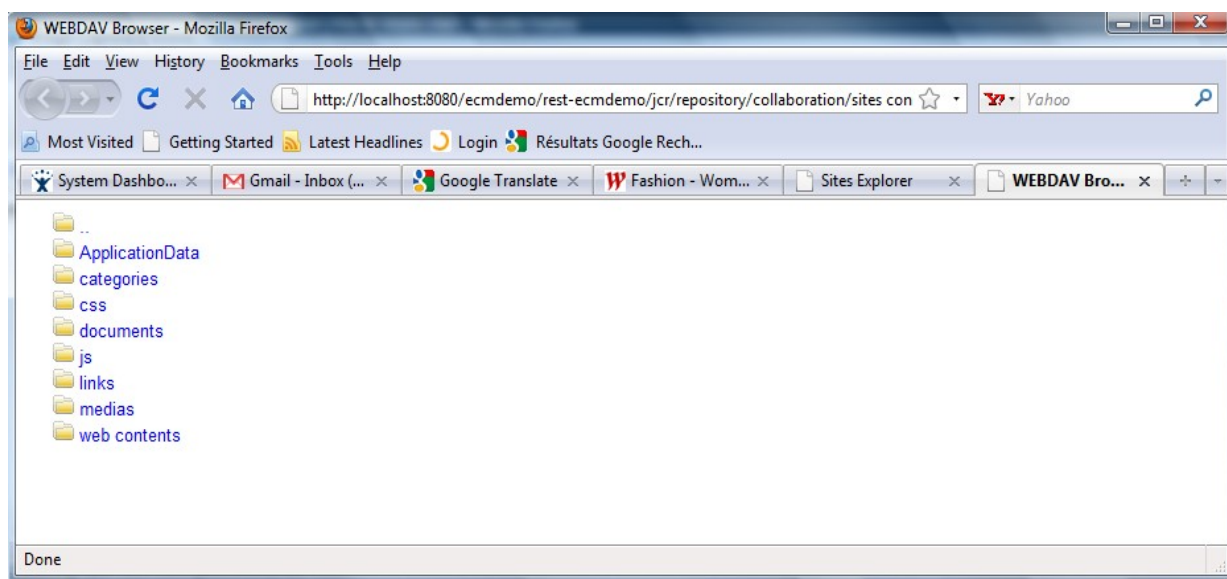


Illustration 91: The Default folders of a site in WebDAV view

4.7.4 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.

4.7.4.1 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.

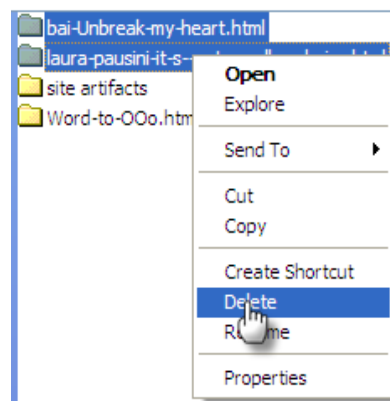
After adding a new web content successfully, you can view it as a folder by WebDAV view or view it as a web site by using a browser.

4.7.4.2 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.



4.8 Search in Sites Explorer


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

4.8.1 Simple search

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

Do as follows:

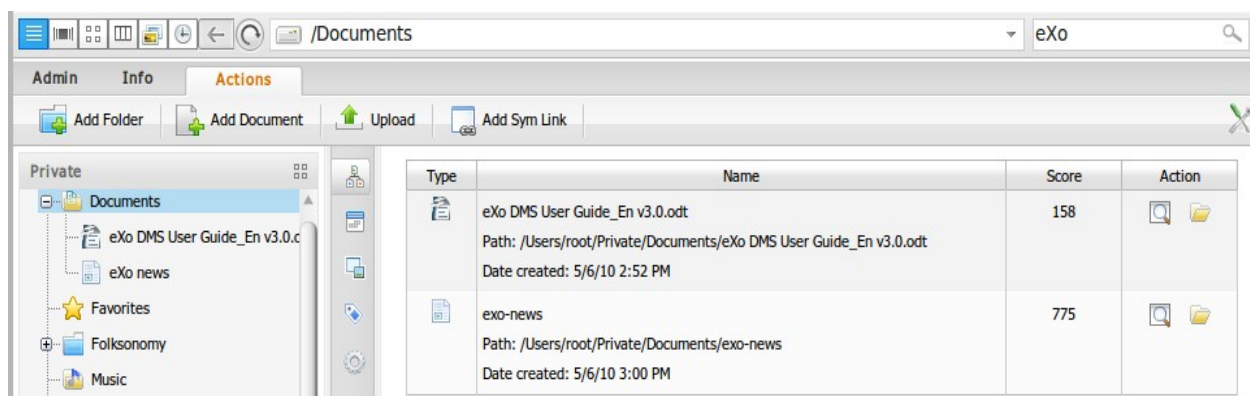
Step 1: Input a string that is existing in a document you want to find (not in name)







Step 2: Click the magnifying glass icon  to search.

The search result will be returned in the right panel.







| Type | Name | Score | Action |
|------------------|------|-------|--------|
| No result found! | | | |

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



| 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 |   |

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 |   |

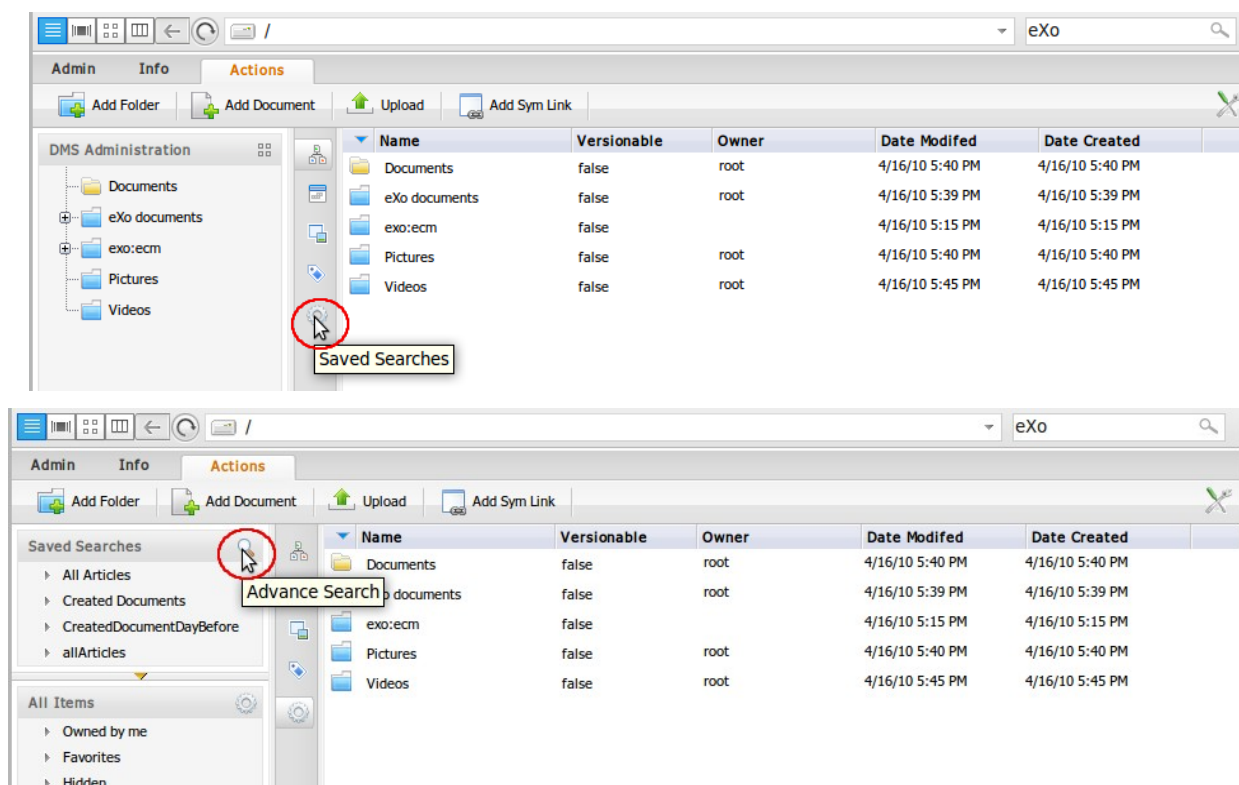
You can also click  to go to the node that contains the corresponding search result.

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

4.8.2 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:

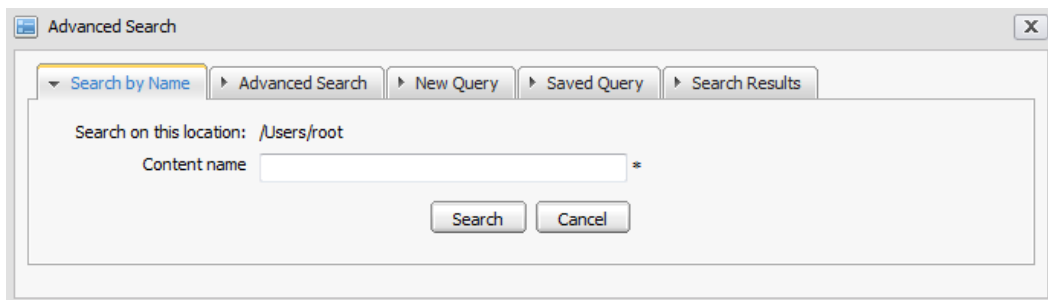


Illustration 92: The Advanced Search form

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

4.8.2.1 Search by name

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

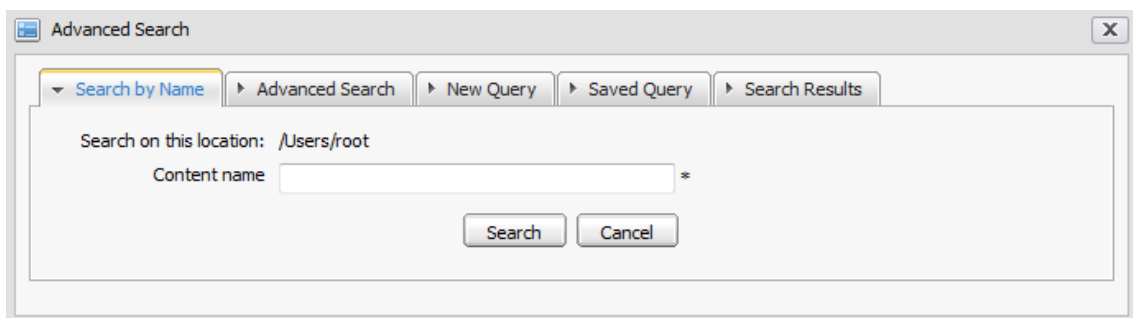


Illustration 93: The Search by Name tab in the Advanced Search form

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.

4.8.2.2 Search with constraints

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

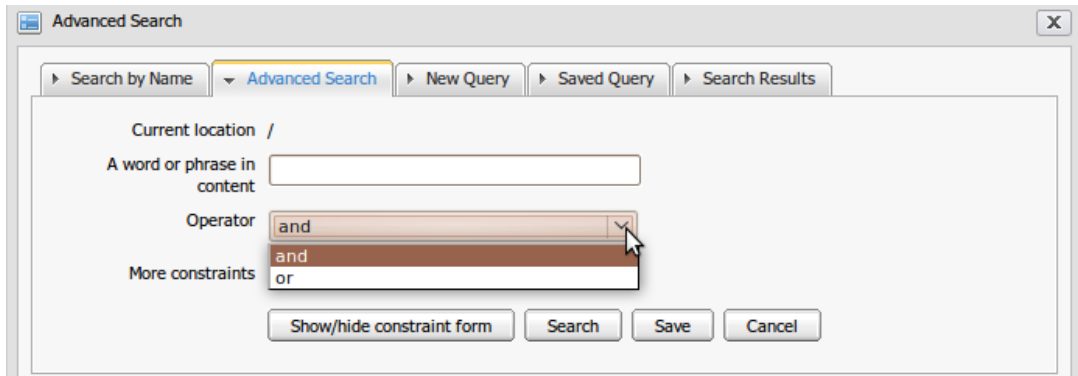
Current location is the path that you selected to search.

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**.



Advanced Search

Search by Name Advanced Search New Query Saved Query Search Results

Current location /

A word or phrase in content

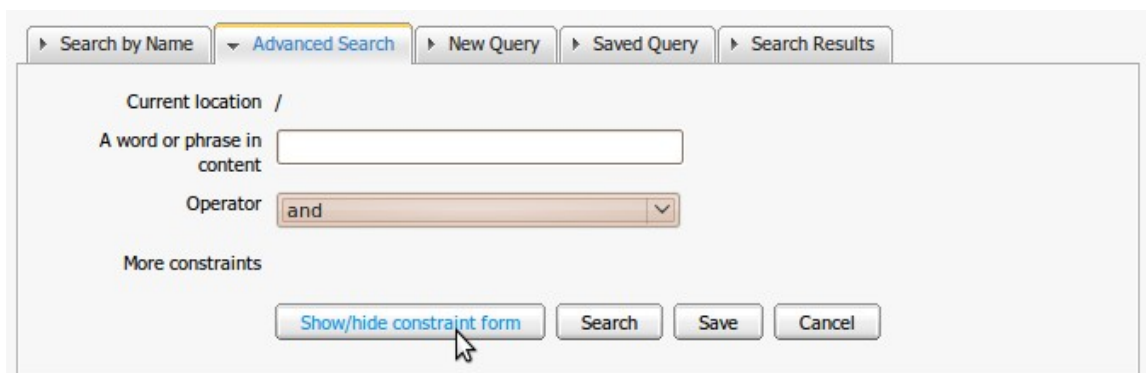
Operator and

More constraints

Show/hide constraint form Search Save Cancel

- 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.



Search by Name Advanced Search New Query Saved Query Search Results

Current location /

A word or phrase in content



Operator and


More constraints


Show/hide constraint form Search Save Cancel

The adding constraints form will appear:


Operator : and ①


☐ Property:  Contain Exactly :  ②

☐ Property :  Contain : ③



☐ Property :  Not Contain: ④

☐ CREATED ▼ From To ⑤

☐ Document Type :  ⑥

☐ Category :  ⑦

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. |

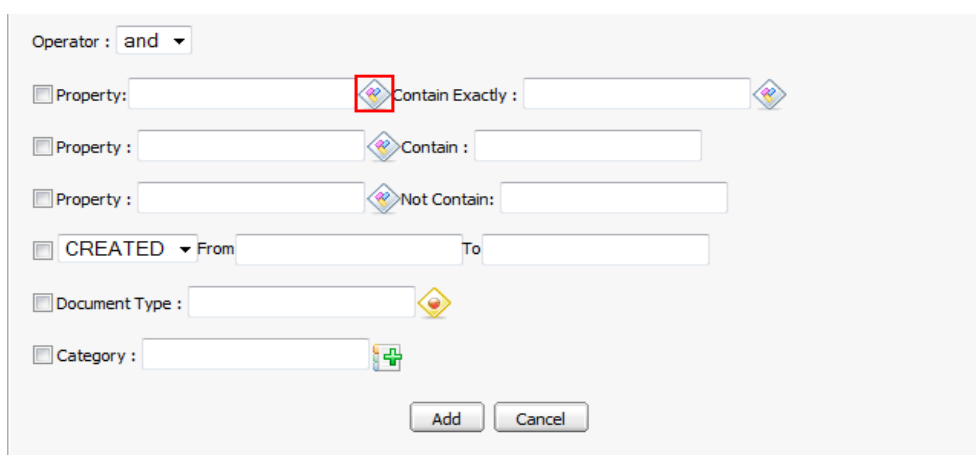
Step 4: Select the constraint operator (AND/OR).

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 .



The screenshot shows a web form for adding constraints. At the top, there is a dropdown menu for the 'Operator' set to 'and'. Below this, there are several rows, each starting with a checkbox. The first row is selected, and its 'Contain Exactly' label is highlighted with a red box. To the right of the 'Contain Exactly' label is an 'Add Property' icon (a diamond with a plus sign). The other rows have labels 'Contain' and 'Not Contain'. Below these rows, there is a section for 'Document Type' and 'Category', each with a dropdown menu and an 'Add Property' icon. At the bottom of the form, there are 'Add' and 'Cancel' buttons.

The form to select properties appears:

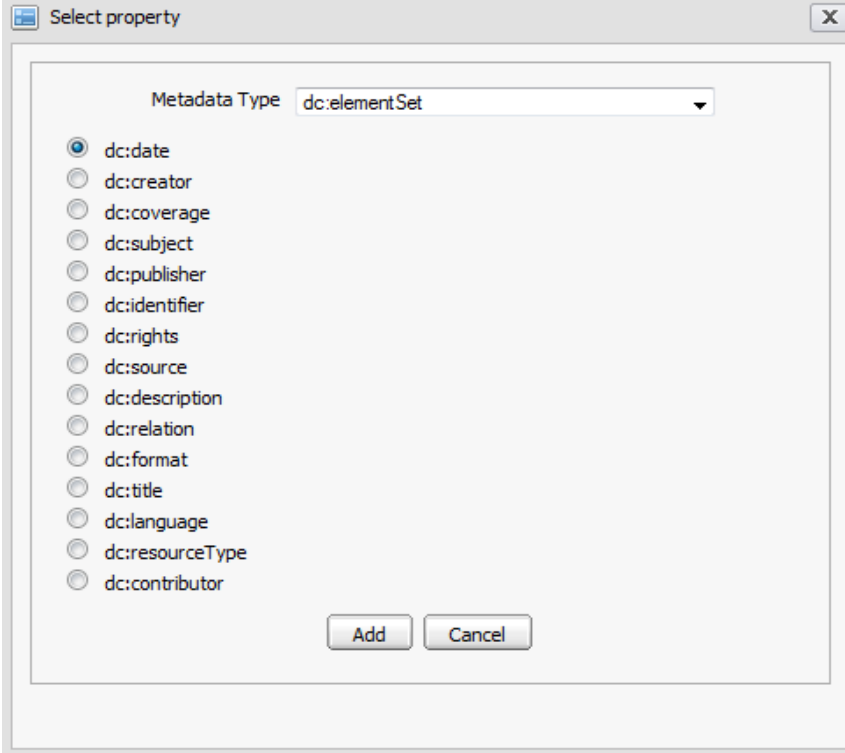
A dialog box titled "Select property" with a close button (X) in the top right corner. It contains a "Metadata Type" dropdown menu set to "dc:elementSet". Below this is a list of 17 properties, each with a radio button: dc:date (selected), dc:creator, dc:coverage, dc:subject, dc:publisher, dc:identifier, dc:rights, dc:source, dc:description, dc:relation, dc:format, dc:title, dc:language, dc:resourceType, and dc:contributor. At the bottom are "Add" and "Cancel" buttons.

Illustration 94: 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  .

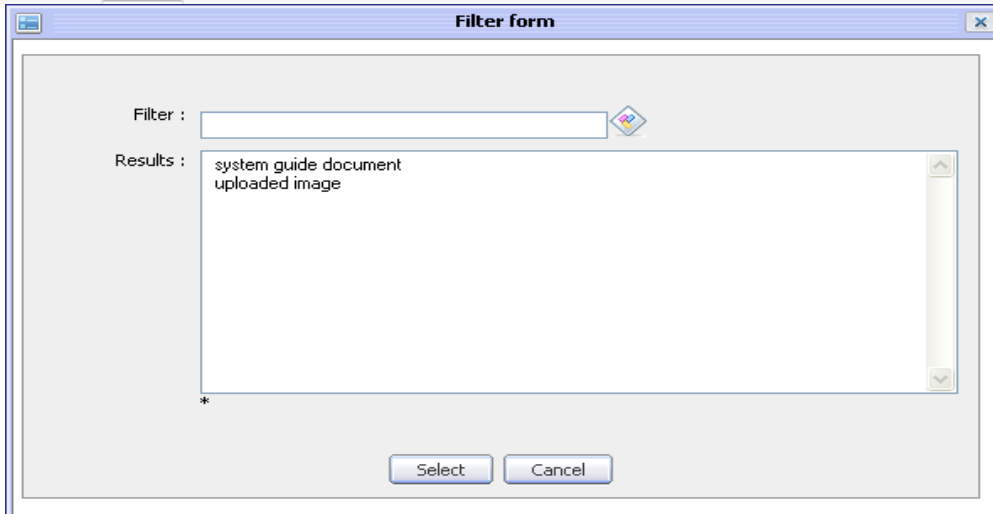

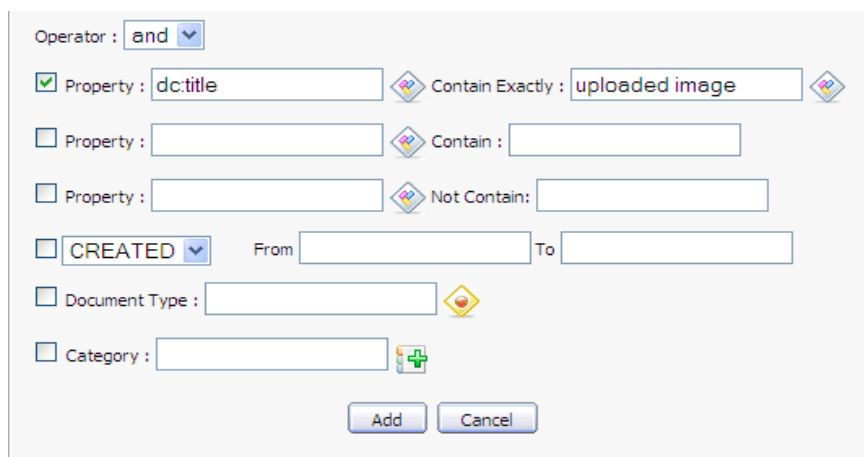
A dialog box titled "Filter form" with a close button (X) in the top right corner. It has a "Filter :" label followed by a text input field and a "Find exactly" icon (a diamond with a magnifying glass). Below this is a "Results :" label followed by a list box containing the text "system guide document" and "uploaded image". At the bottom are "Select" and "Cancel" buttons.

Illustration 95: 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.

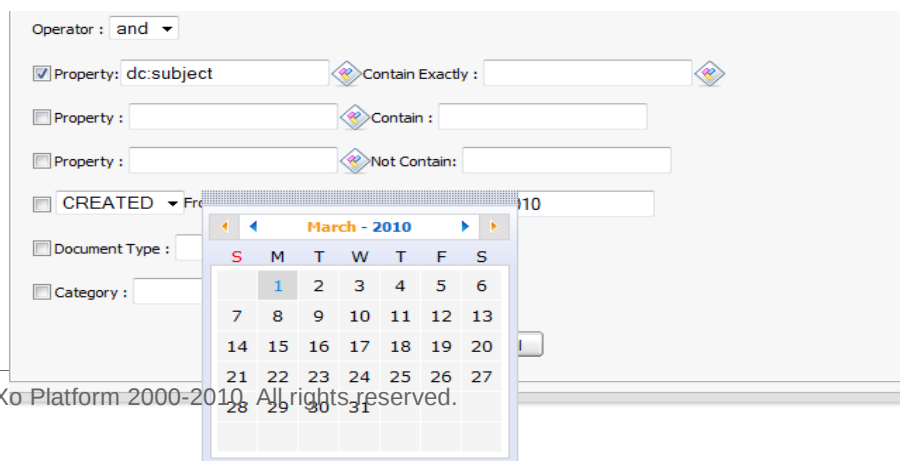


- **5.2** To add a constraint to search by properties with exactly values, do as follows:

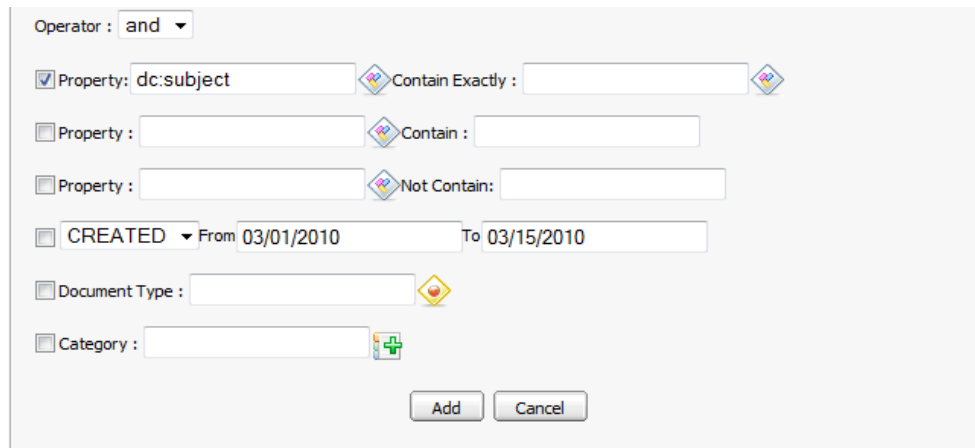
1. Check the check box corresponding to the one you want to add constraints
2. Input the property you want to find or click Add Property icon .
3. Input value in the **Contain** or **Not Contain** field.
4. Click **Add**.


- **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.



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



- **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.

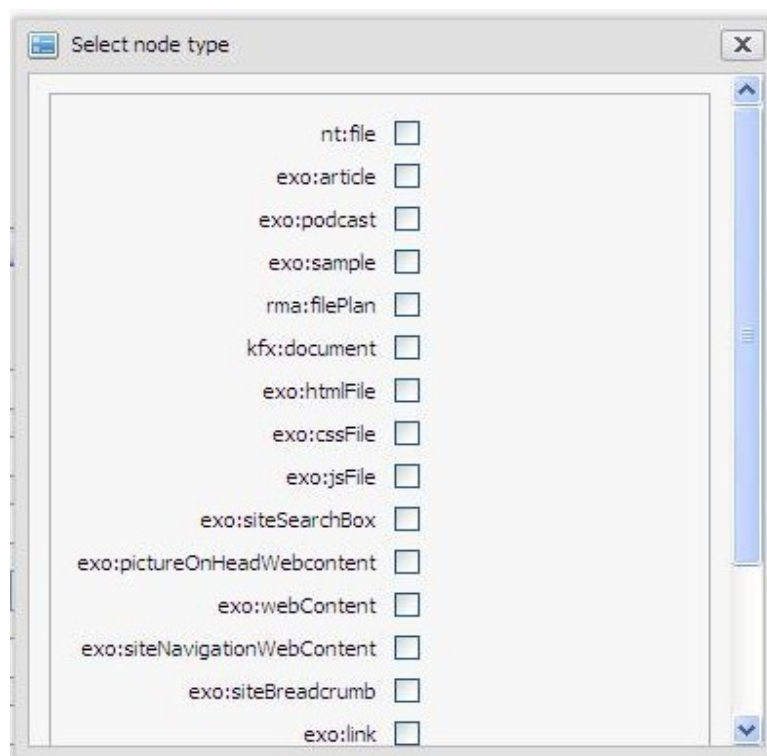



Illustration 96: The Select node type form

3. Mark the checkbox of the document type you want, then click **Save**.

4. Checked document types will be displayed:


- **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:

| Name | Action |
|----------|--------|
| Cms | ✓ |
| Calendar | ✓ |

3. Click  on a category you want to select. The selected category will be displayed in the **Category** field.

4. 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.

4.8.2.3 Search by creating a new query

Select the **New Query** tab:

Advanced Search

Search by Name | Advanced Search | **New Query** | Saved Query | Search Results

Name *

Select Query Style

Query

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.

4.8.2.4 Search by existing queries

Select the **Saved Query** tab:

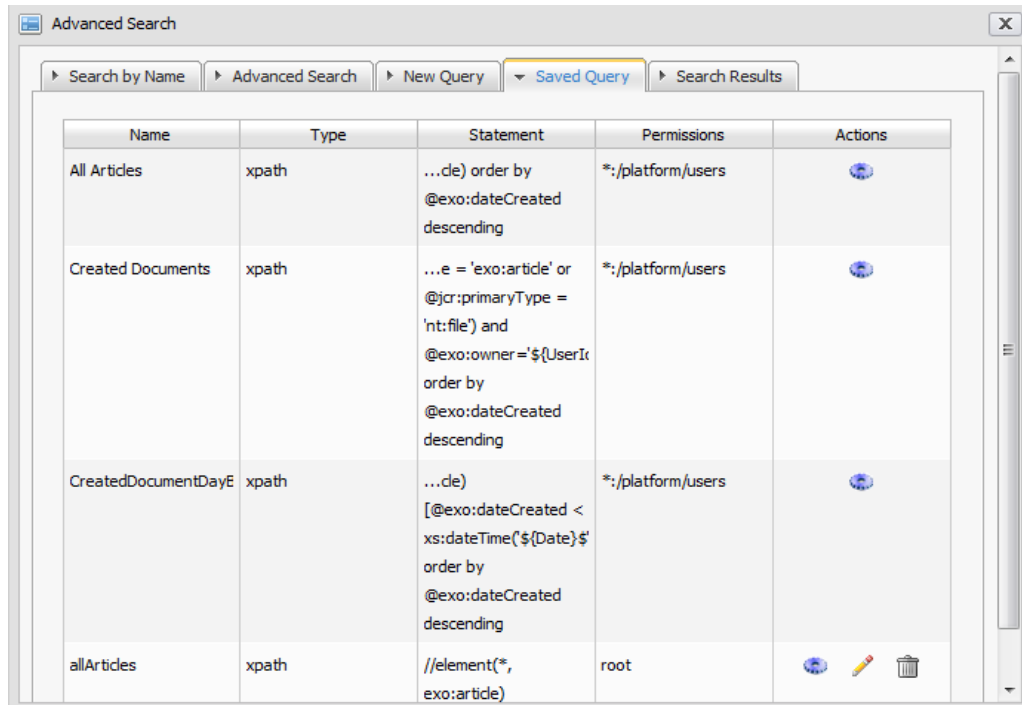


Illustration 97: The Saved Query tab in the Advanced Search form

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

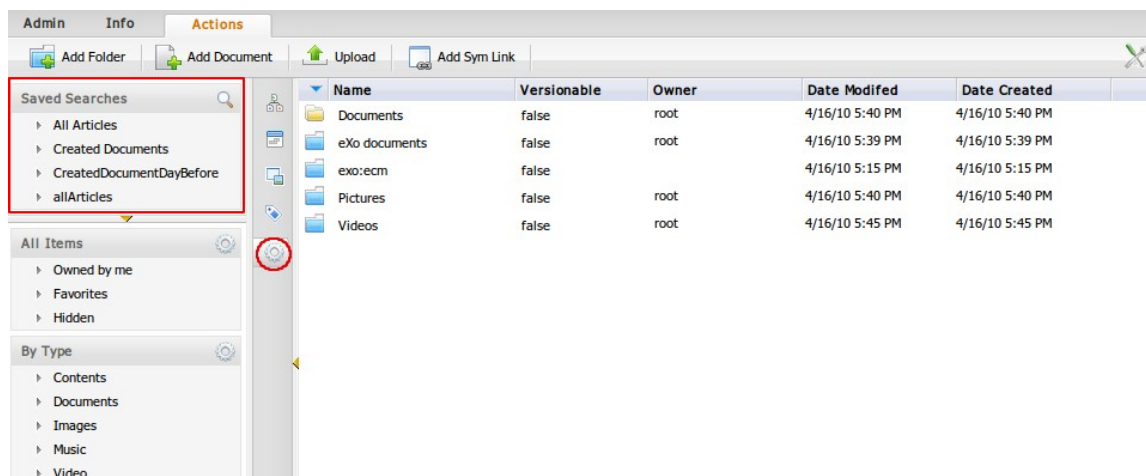
Click if you want to change the query statement. The editing form appears like when you create a new query but you can not change its name.

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

4.8.3 Quick search

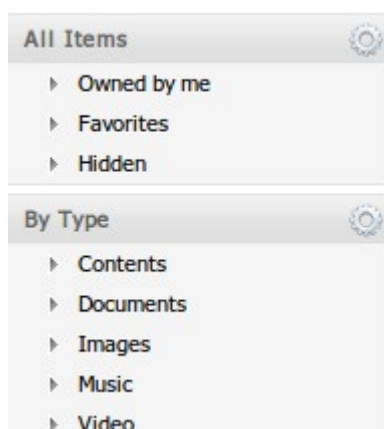
This is the quick way for you to use the existing queries to search.

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.

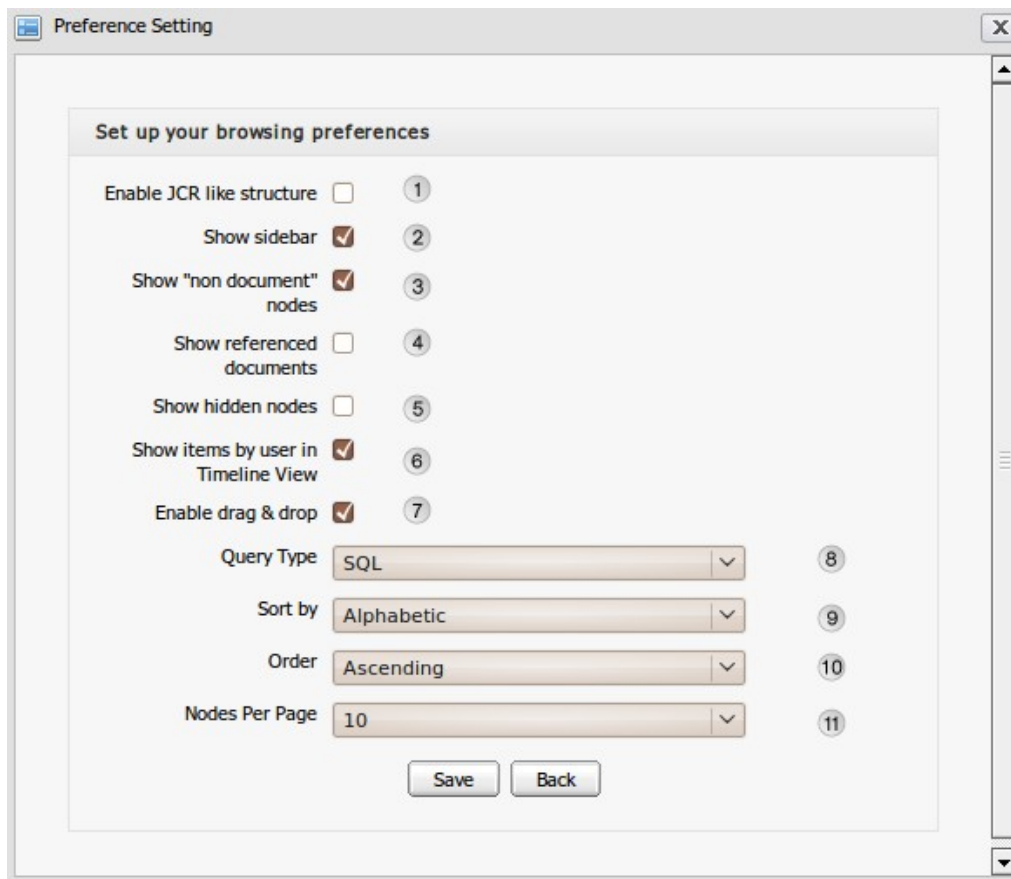
You can click directly on files or a folders's name to view their content and download these files .

4.9 Preferences

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 options, 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 98: 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.

4.10 Newsletters

WCM provides a newsletter service aiming at helping users quickly get the updated newsletters from a website.

4.10.1 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:

Acme Corp

Welcome: root Logout | Change language

Overview News Newsletters Contact Us

Newsletters

Overview News Newsletters Contact Us

NEWSLETTERS

Your Email *

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

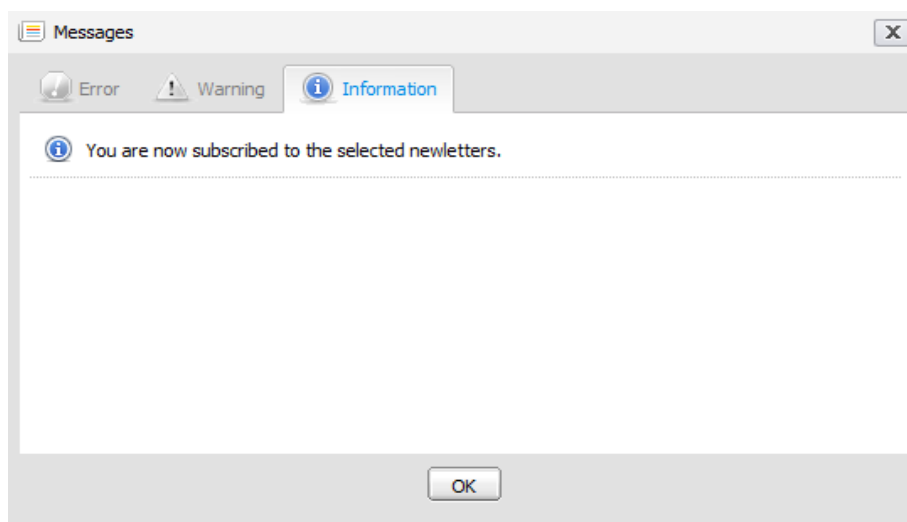
| Subscription | Check to subscribe |
|---|--------------------------|
| Results <i>Monthly newsletter about our results and forecasts</i> | <input type="checkbox"/> |
| Check-List <i>Weekly newsletter with general topics</i> | <input type="checkbox"/> |

Subscribe

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 don't want to receive newsletters by re-selecting the checkbox in the **Check to subscribe** column.

A screenshot of the 'Newsletters' page. At the top is a navigation bar with 'Overview', 'News', 'Newsletters' (selected), and 'Contact Us'. Below is a banner with a world map and the word 'NEWSLETTERS'. Under the banner, there's 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 subscription options. Below that is a 'General' section with the text 'General information about us'. It also contains a table with subscription options. At the bottom is a 'Change your subscriptions' button.

| Subscription | Check to subscribe |
|--|-------------------------------------|
| The market <i>What's on the market today ?</i> | <input checked="" type="checkbox"/> |

| Subscription | Check to subscribe |
|---|-------------------------------------|
| Results <i>Monthly newsletter about our results and forecasts</i> | <input checked="" type="checkbox"/> |
| Check-List <i>Weekly newsletter with general topics</i> | <input checked="" type="checkbox"/> |

Step 6: Click **Change your subscriptions** to update your changes.

Step 7: Click **Forget this email** if you want to unsubscribe from newsletters.

4.10.2 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:

The screenshot shows the 'eXo Newsletter Manager' interface. At the top, there's a navigation bar with 'Sites Explorer', 'Newsletter Manager' (highlighted), 'Form Generator', and 'Sites Administration'. Below this, the page title is 'eXo Newsletter'. A toolbar contains icons for 'New Letter', 'New Subscription', 'New Category', and 'Manage Users'. The main content area has two tabs: 'Marketing' and 'General'. The 'Marketing' tab is active, displaying a table with the following data:

| Subscription | Number of User | Awaiting Letter |
|--------------|----------------|-----------------|
| The market | 1 | 0 |

The 'General' tab is also visible, showing a table with the following data:


| Subscription | Number of User | Awaiting Letter |
|--------------|----------------|-----------------|
| Results | 0 | 0 |
| Check-List | 0 | 0 |

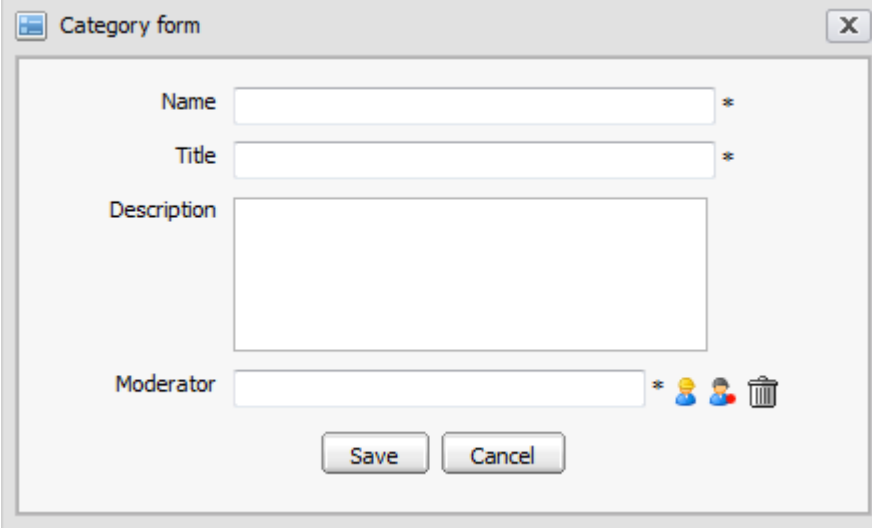
Illustration 99: The Newsletter Manager Page

4.10.2.1 Category

Administrators easily add new categories.

Add a new category

Step 1: Click  **New Category** on the action bar of the Newsletter Manager Page. The **Category** form will appear:



The screenshot shows a 'Category form' dialog box with the following fields:

- 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 for a brief description.
- Moderator**: A text input field with an asterisk (*) and a dropdown icon showing user avatars and a trash can, indicating a selection of a user or group.


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

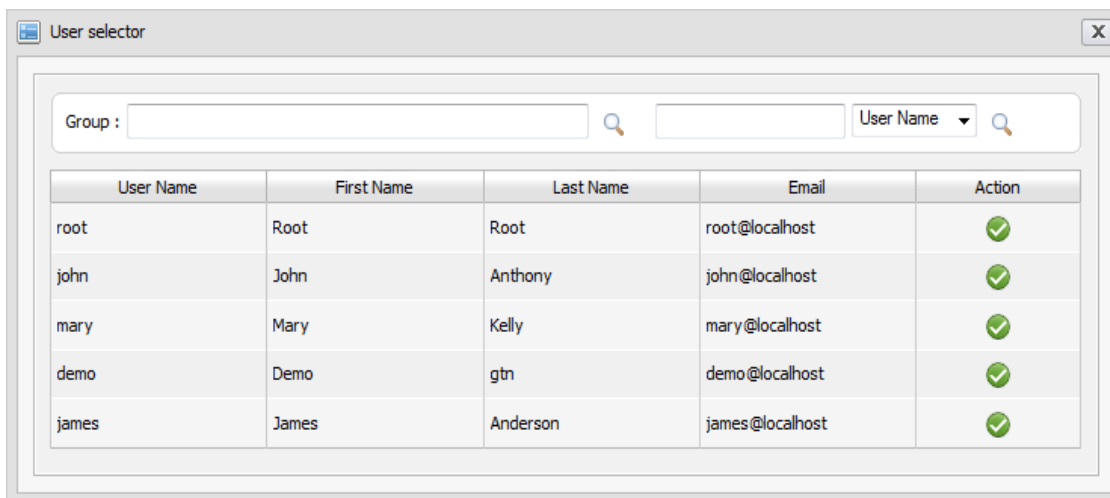
Illustration 100: The Category form

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:




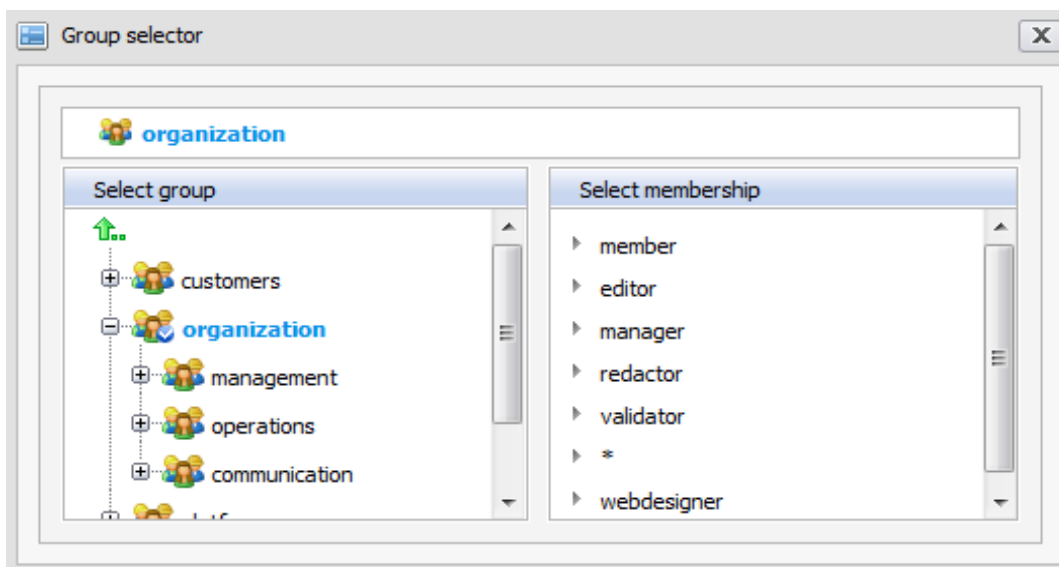
The 'User selector' window contains a search bar at the top with a 'Group' label and a 'User Name' dropdown. Below the search bar is a table with the following data:

| 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 | ✓ |
| james | James | Anderson | james@localhost | ✓ |

Illustration 101: 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:



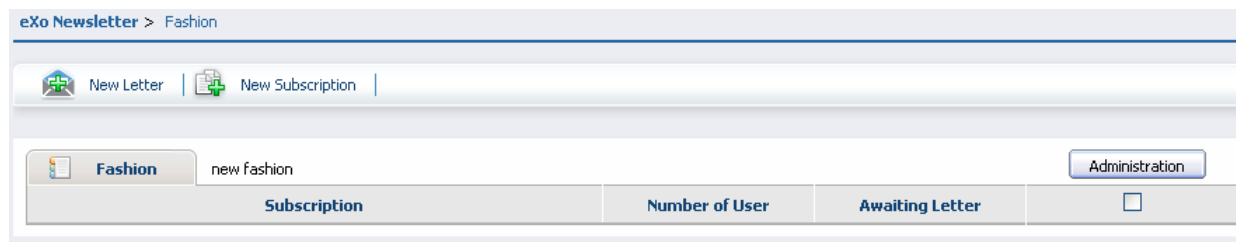
The 'Group selector' window is divided into two panels. The left panel, titled 'Select group', shows a tree structure with the following groups: customers, organization (selected), management, operations, and communication. The right panel, titled 'Select membership', shows a list of roles: member, editor, manager, redactor, validator, *, and webdesigner.

Illustration 102: 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).



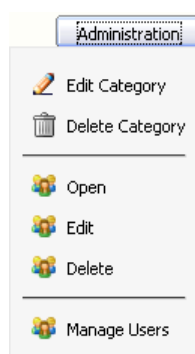
Here, you can create new subscriptions or newsletters for this category.

Step 4: Click the **Administration** button to open the menu which lists all actions that an administrator can take on this category.

Edit a category

To edit a category, follow these steps:

Step 1: Click the **Administration | Edit Category**.



The **Category form** will appear:

Category form

Name: Fashion *

Title: New Trend *

Description: New Trend Fashion

Moderator: manager:/organization * [User Icons] [Trash Icon]

Save Cancel

Details:

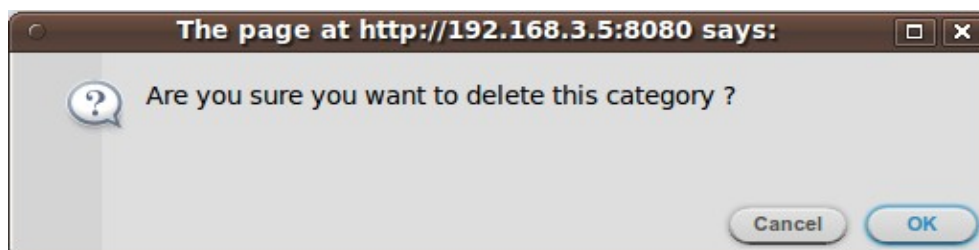
| | |
|--------------------|---|
| Name | The name of the category. This field can not be changed |
| Title | The title of the category. This field can be changed. |
| Description | The brief description about the category. This field can be changed. |
| Moderator | Allows an administrator to select 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.

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.

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 103: 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. |

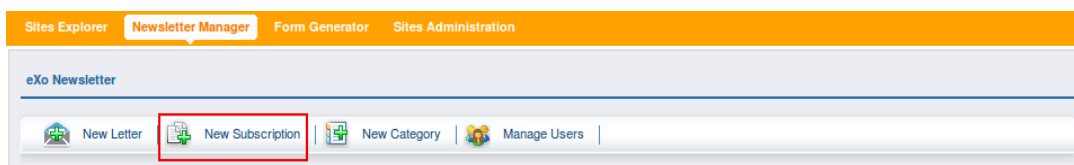
Step 2: Click **Close** to close this form.

4.10.2.2 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:

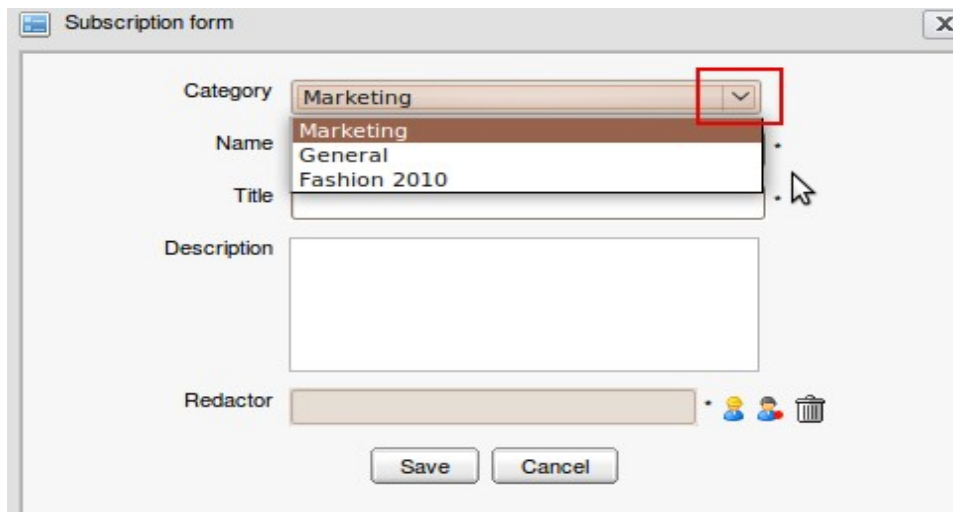
The 'Subscription form' dialog box is shown. It has a title bar with a close button. The form contains the following fields: 'Category' (a dropdown menu with 'Marketing' selected), 'Name' (a text input field with an asterisk indicating it's required), 'Title' (a text input field with an asterisk indicating it's required), 'Description' (a large text area), and 'Redactor' (a text input field with an asterisk and icons for user selection). At the bottom are 'Save' and 'Cancel' buttons.

Illustration 104: 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:



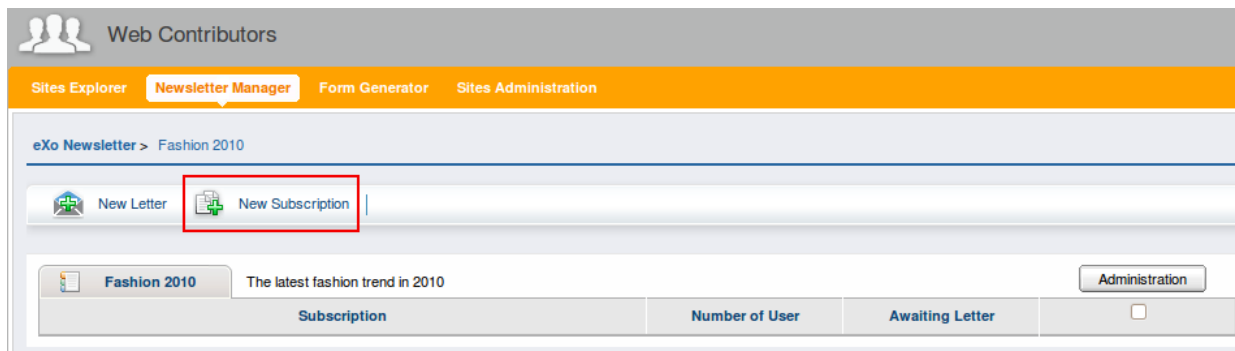
The image shows a 'Subscription form' dialog box. It contains the following fields: 'Category' (a dropdown menu with 'Marketing' selected and a red box around the arrow), 'Name' (a text field with 'Marketing' entered), 'Title' (a text field with 'General Fashion 2010' entered), 'Description' (a large 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:

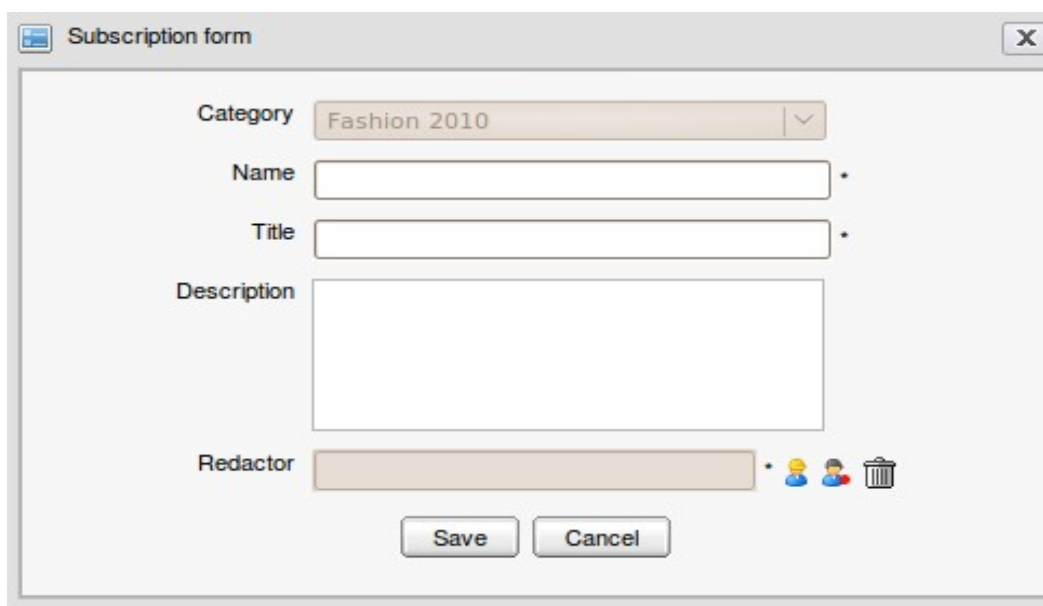
Click directly the category that you want to create a subscription.



The image shows the 'Web Contributors' interface. At the top is a navigation bar with 'Sites Explorer', 'Newsletter Manager' (highlighted), 'Form Generator', and 'Sites Administration'. Below this is a breadcrumb 'eXo Newsletter > Fashion 2010'. The main area has two buttons: 'New Letter' and 'New Subscription' (highlighted with a red box). Below the buttons is a table with the following content:

| Fashion 2010 | | The latest fashion trend in 2010 | | Administration |
|--------------|----------------|----------------------------------|--------------------------|----------------|
| Subscription | Number of User | Awaiting Letter | <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 avatars 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"/> |

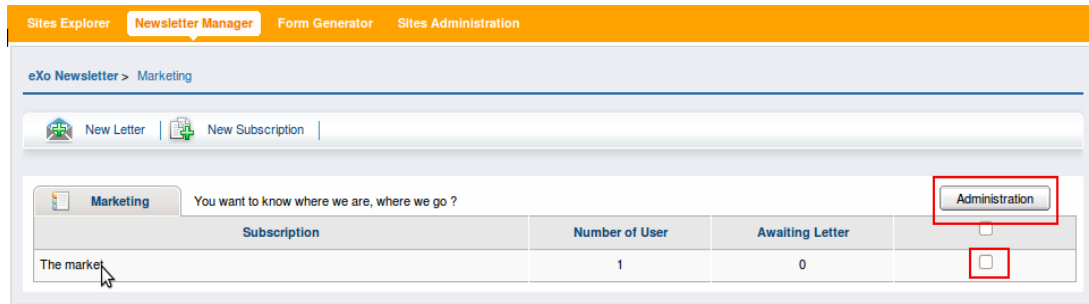
Details:

| | |
|----------------------|--|
| 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 |

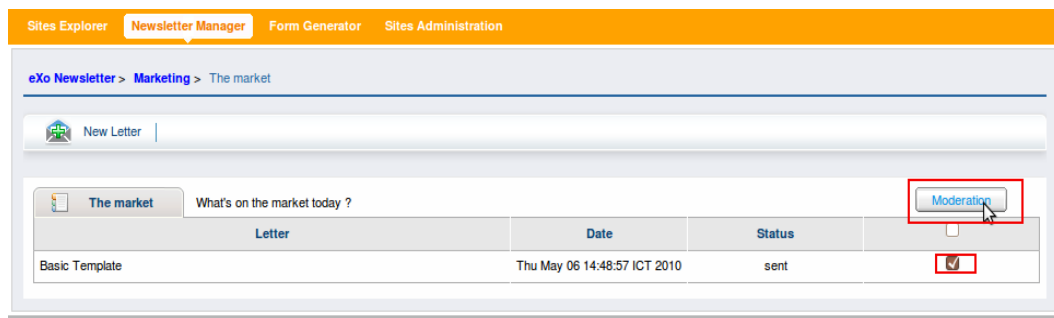
4.10.2.3 Open a Newsletter

Administration can easily view the content of a newsletter. Do the following steps:

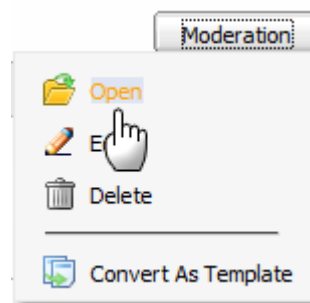
Step 1: Choose a specific subscription in a category by left-clicking it or checking in the checkbox, then select **Administration | Open** item:



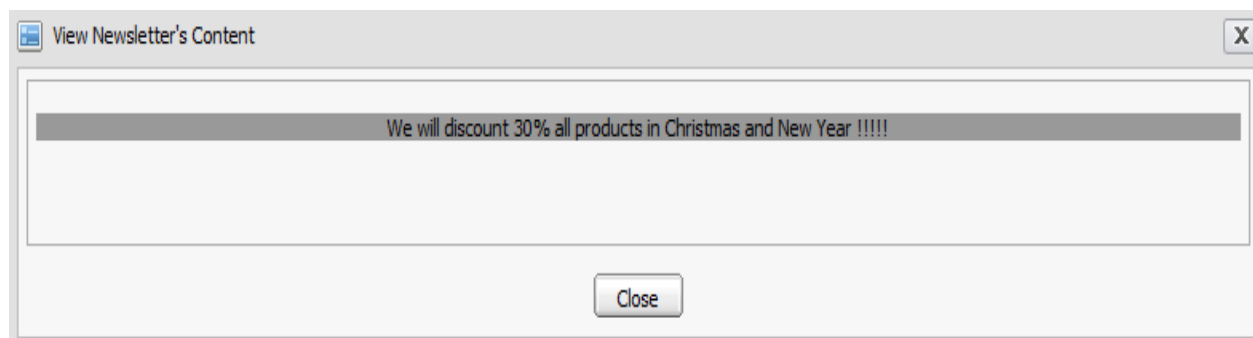
Step 2: Select the newsletter that you want to open by left-clicking it, or selecting the checkbox.



Step 3: Click the **Moderation** button, then select **Open** in the menu.



The **Content of View Newsletter** form will be displayed:



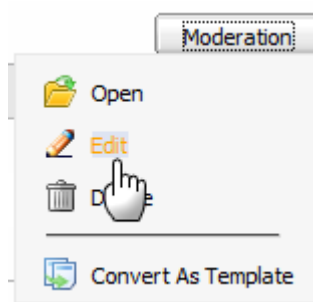
Step 4: Click **Close** to close this form.

4.10.2.4 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:

- Template :** A dropdown menu showing "Basic Template".
- Send date :** A text input field containing "03/06/2010 16:43:18".
- Category :** A dropdown menu showing "New Trend".
- Subscription :** A dropdown menu showing "Euro exported shoes".
- Update sending parameters** button.

Below these fields are three tabs: "Main Content" (selected), "Illustration", and "Advanced". The "Main Content" tab shows:

- Name :** A text input field containing "discount".
- Title :** A text input field containing "Discount".
- Main content** section with a rich text editor toolbar (Source, Bold, Italic, Underline, Bulleted List, Numbered List, Indent, Outdent, Link, Unlink, etc.) and a text area containing 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.

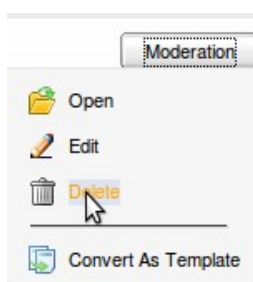
Step 5: Change the values in the fields: **Title** and **Main content**.


Step 6: Click **Save** to save as draft, or click **Send**.

4.10.2.5 Delete a newsletter

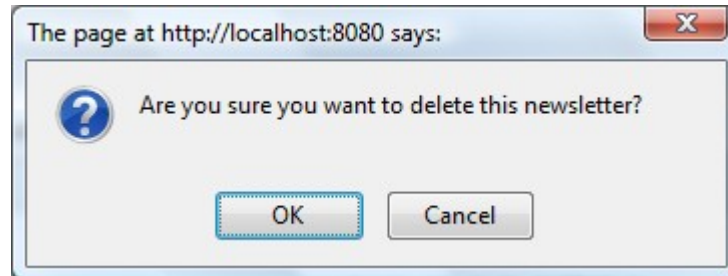
Administrator can delete obsolete newsletters by following:

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.

4.10.2.6 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**.

4.10.2.7 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:

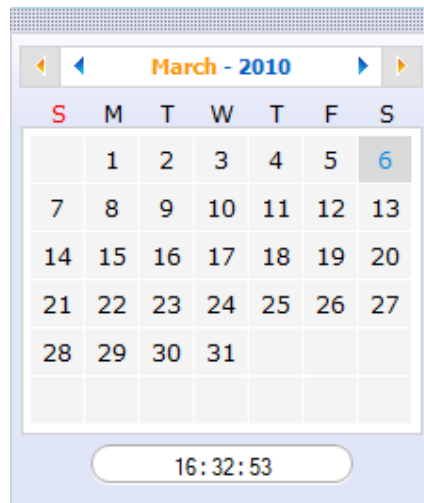
Illustration 105: The Newsletter entry form

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.

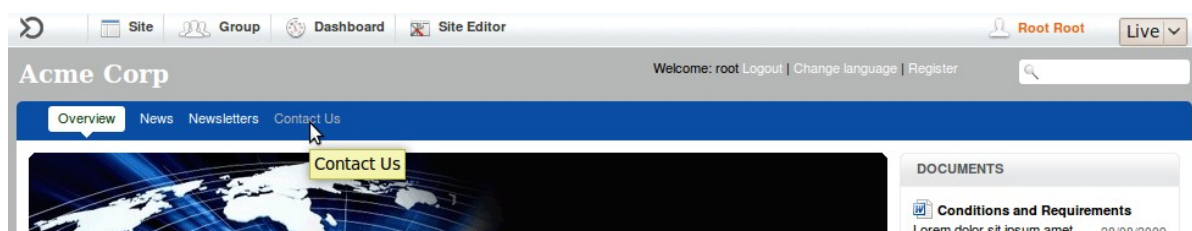
Step 6: Click the **Update sending parameters** button to update information about this newsletter. A message pops up and informs that you have updated information successfully.

Step 7: Input a title of a newsletter in the **Title** field.

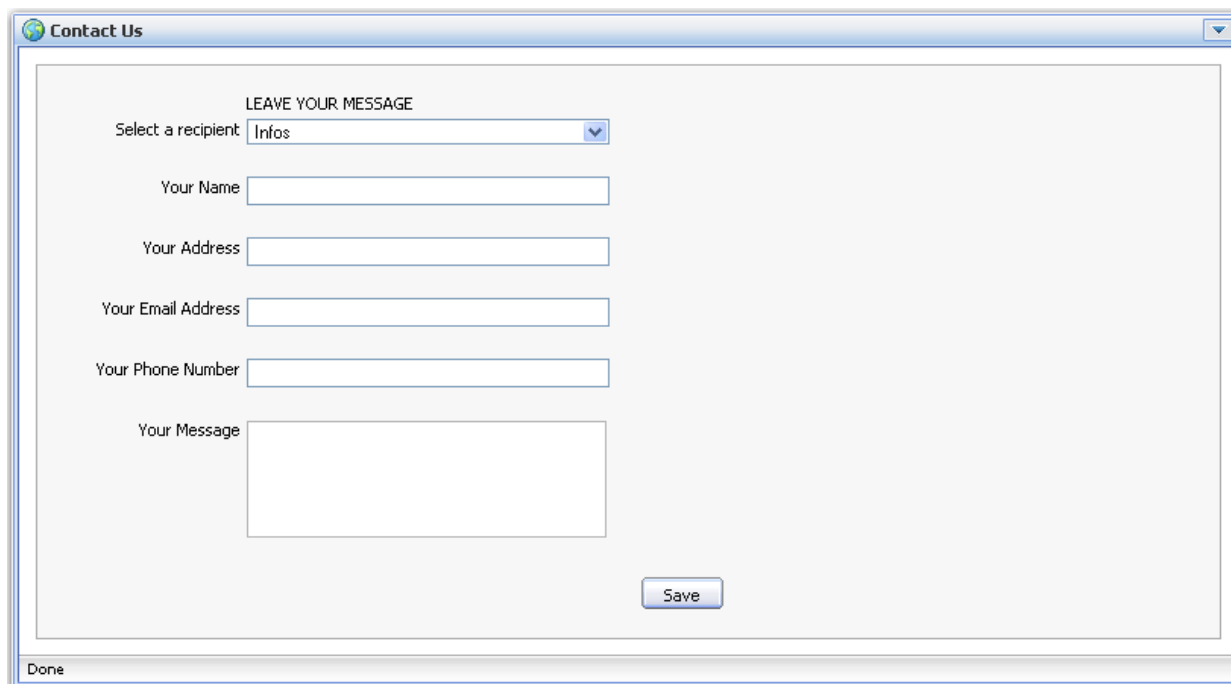
Step 8: Create a content for a newsletter by inputting information in the **Main content** textbox

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:



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.

4.11 Fast Content Creator



This feature only supports users as administrators (root/gtn) and web-contributor (Mary/gtn). In this part, we use the account root/ gtn to give the guide.

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:

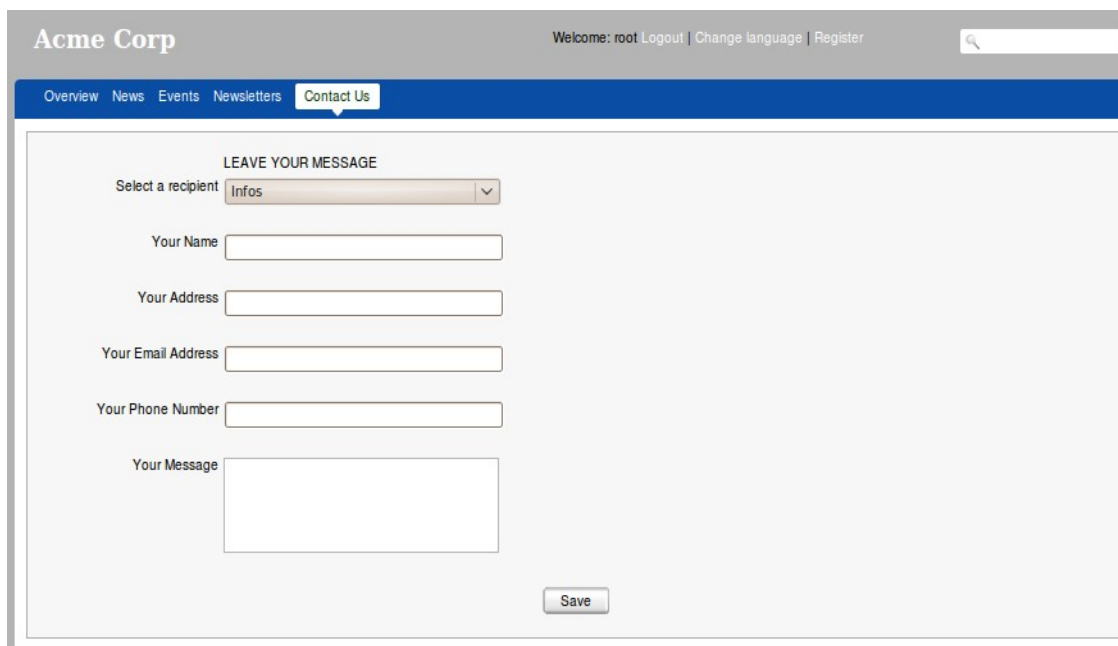


Illustration 106: The Contact Us page

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.

4.11.1 Edit Mode

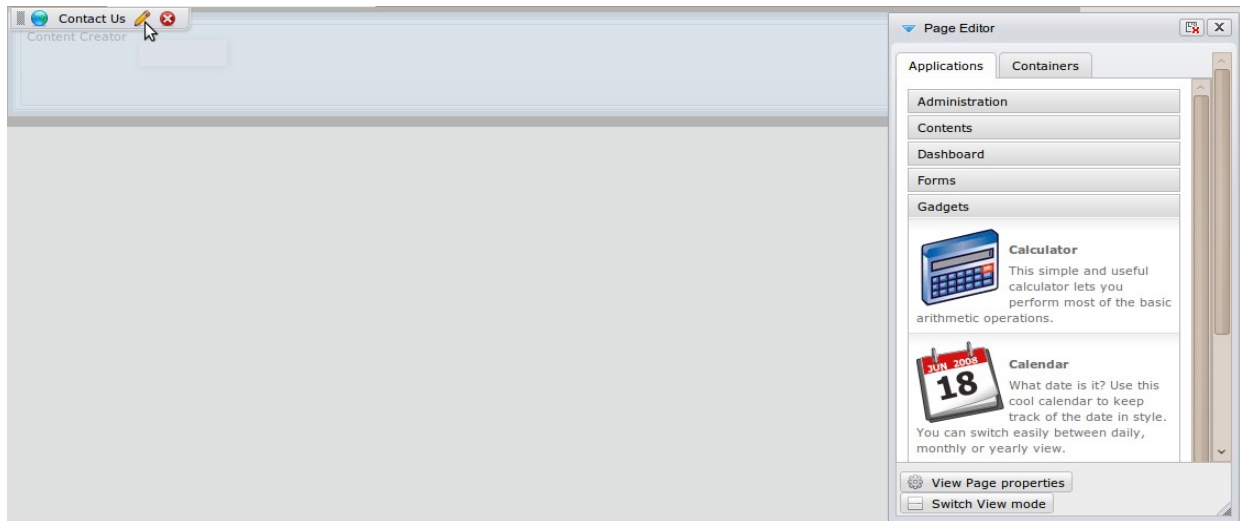
Users can edit templates, take actions and save locations for the documents in the Contact Us

portlet.

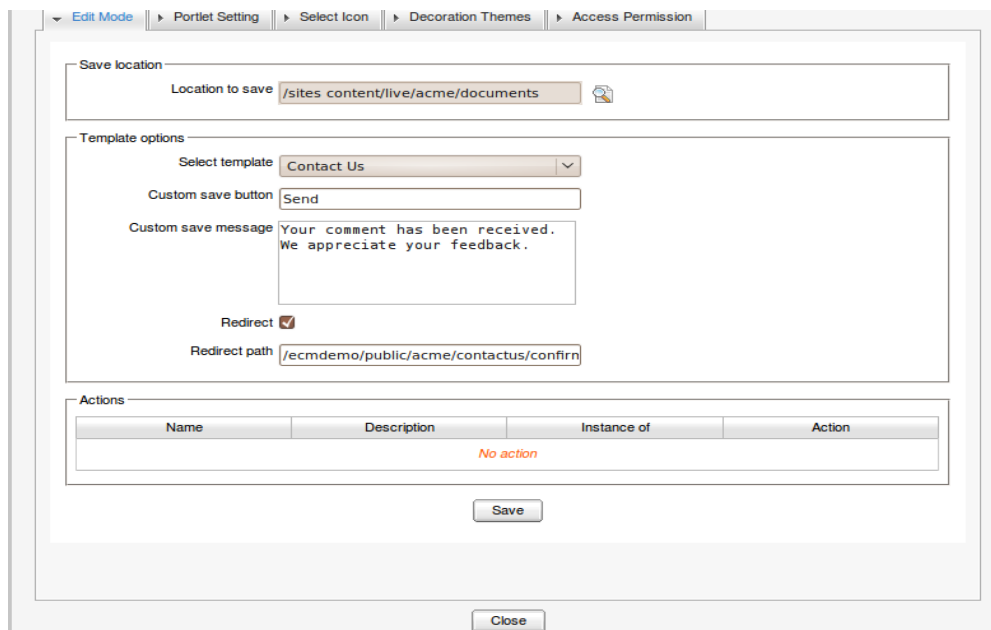
Step 1: Go to **Contact Us** on the navigation bar or go to **Site | Acme | Contact Us**.

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.




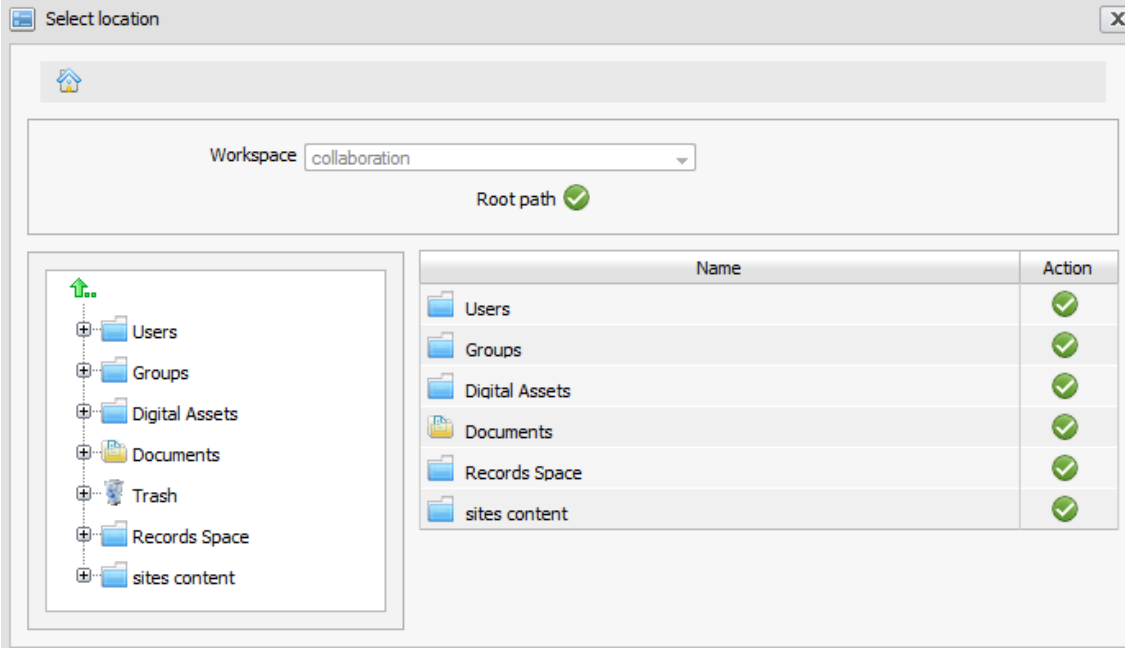
The **Edit Mode** tab is displayed like the following illustration:



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:




| Name | Action |
|----------------|--------|
| Users | ✓ |
| Groups | ✓ |
| Digital Assets | ✓ |
| Documents | ✓ |
| Records Space | ✓ |
| sites content | ✓ |

Illustration 107: 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**.

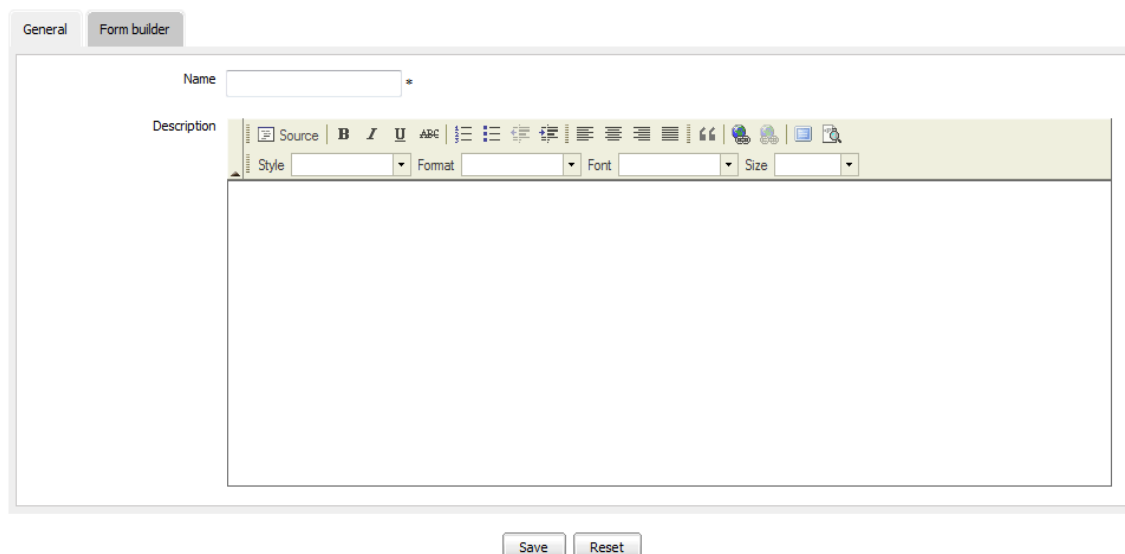
Step 8: Select the **Redirect** checkbox if users want to redirect to the path in the **Redirect path** field after clicking **OK** in the save message.

Step 9: Click **Save** to save all changes of editing properties for documents that users will create in the **Contact Us** Portlet.

4.12 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 'Form Generator' portlet interface. 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. Below the 'Name' field is a 'Description' field. Above 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, image, etc.) and a 'Source' button. Below the toolbar are four dropdown menus: 'Style', 'Format', 'Font', and 'Size'. The 'Description' field itself is a large text area. At the bottom of the portlet, there are two buttons: 'Save' and 'Reset'.

Illustration 108: The General tab in the Form Generator Portlet

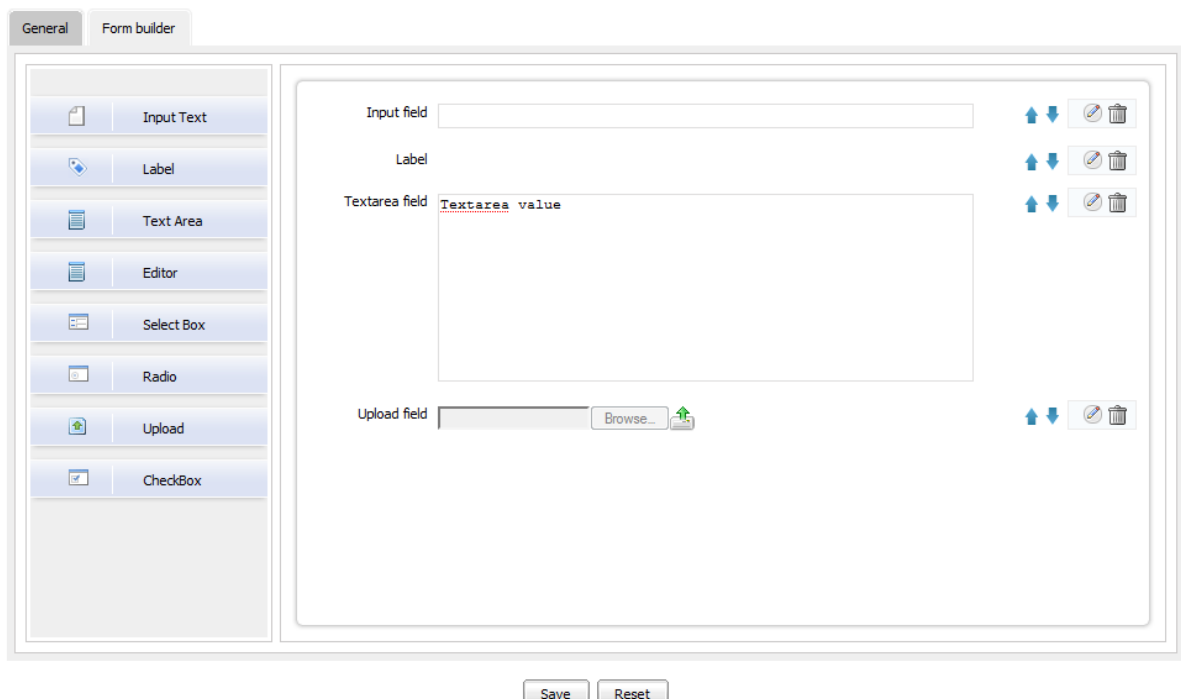
Step 2: Input the node name in the **Name** field. (*Required).

Step 3: Input the brief description about the node.




Illustration 109: 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.

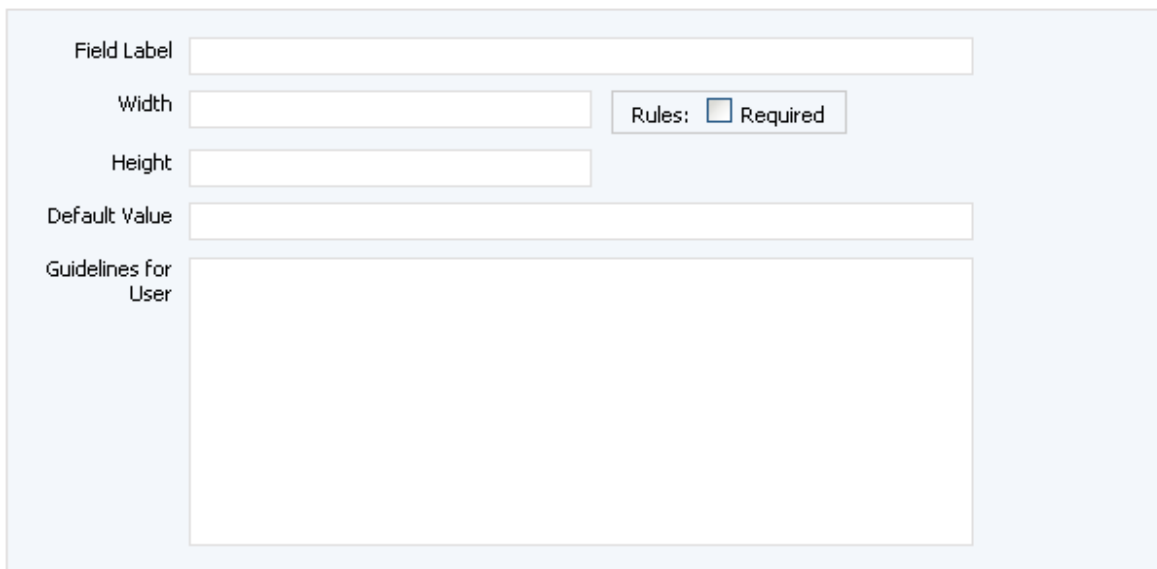


Step 5: Click the desired components on the left panel. The selected components will be displayed on the right panel.

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 is a light blue rectangular box containing several input fields and a checkbox. The fields are labeled 'Field Label', 'Width', 'Height', 'Default Value', and 'Guidelines for User'. The 'Width' field has a 'Rules' checkbox next to it, which is currently unchecked. The 'Guidelines for User' field is a larger text area.

Details:

| | |
|----------------------------|--|
| Field Label | To enter the field label. |
| Width | To enter the field width. If the checkbox in  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.

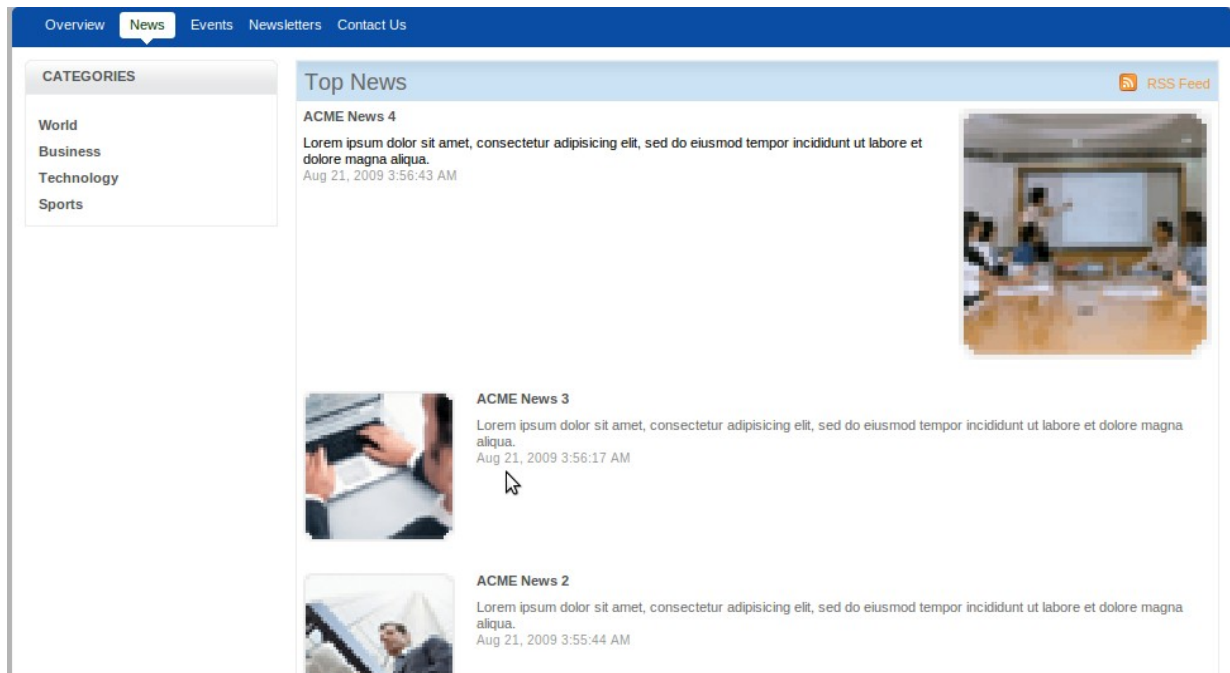
Step 7: Click **Save Form** to save the form that you have created for nodes.

Step 8: Click **Save** to accept creating a new node, or **Reset** to edit this node again before saving.

4.13 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).

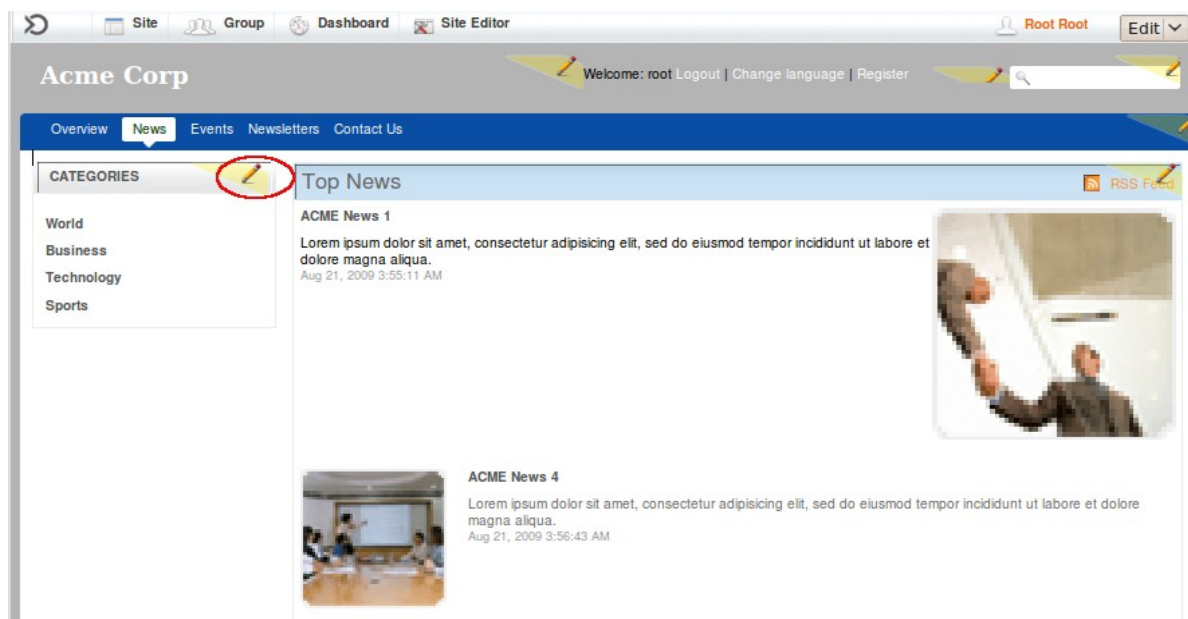


Step 3: Click the title of document or web content to view the whole.

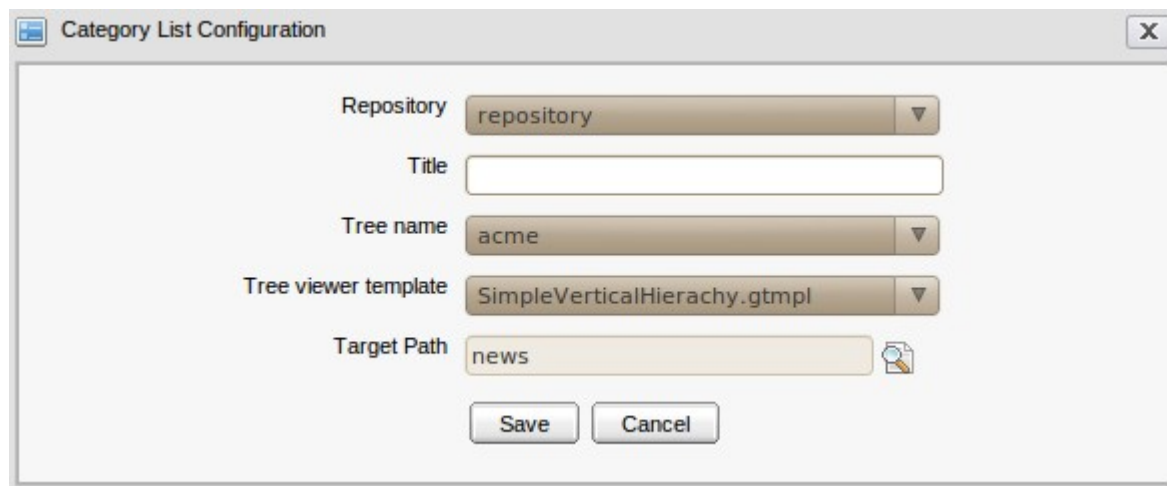
4.13.1 The Edit Mode of Category Navigation portlet

Users 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:



Or, go to **Group | Administration | Page Management** on the Administration bar.



- **Administration** function only supports Administrators

Administration ▾

Search: 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 Portlet | Form Generator Portlet | [*/platform/web-contributors] | manager:/platform/web-contributors | |
| portal::acme::unsubscribe | Unsubscribe | [*/platform/web-contributors] | */platform/administrators | |

Add New Page

The Manage Pages form appears:

- 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

Title

Tree name

Tree viewer template

Target Path

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 2: Click  to select the repository for documents in the **Repository** field.

Step 3: Input the category name in the **Title** field.

Step 4: Select the taxonomy tree for a category.

Step 5: Select the template for displaying categories.

Step 6: Click the icon  to select the target path. The **Page selector** form will appear:

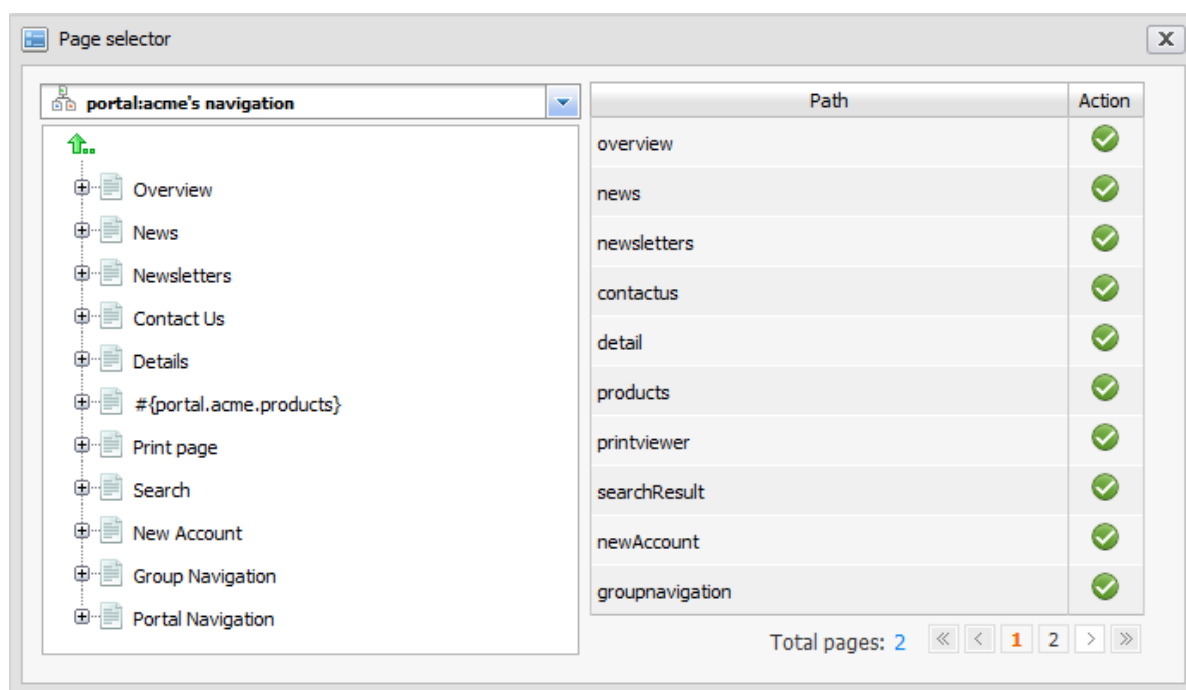




Illustration 110: The Page selector form

Step 7: 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.

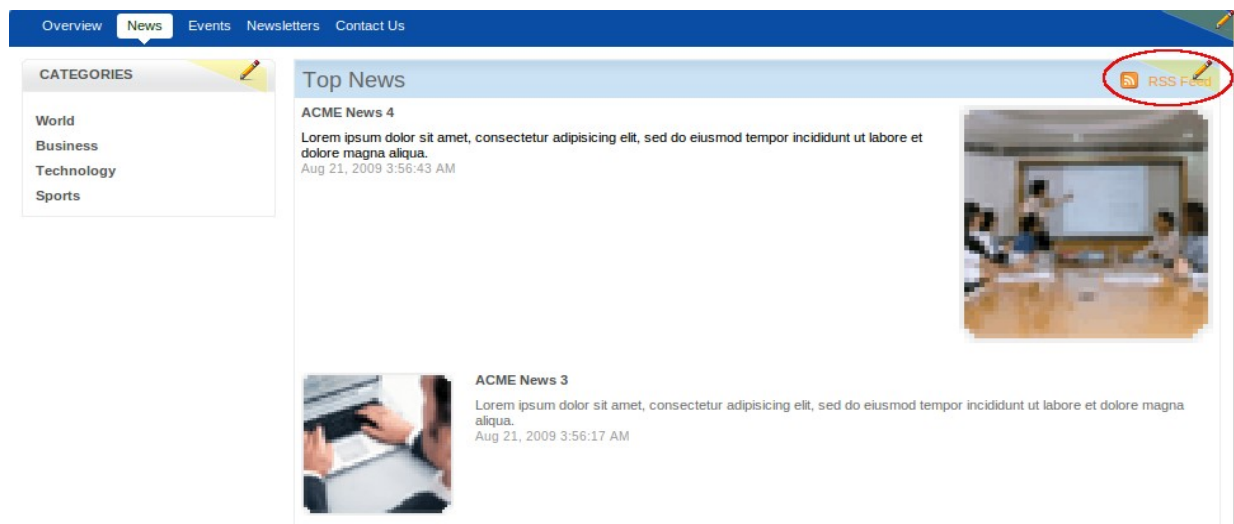
Step 8: Click the icon  to select the path. This path will be displayed in the **Target Path** field.


Step 9: Click **Save** to accept saving the configuration for the **Category Navigation** portlet.

4.13.2 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 111: 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:

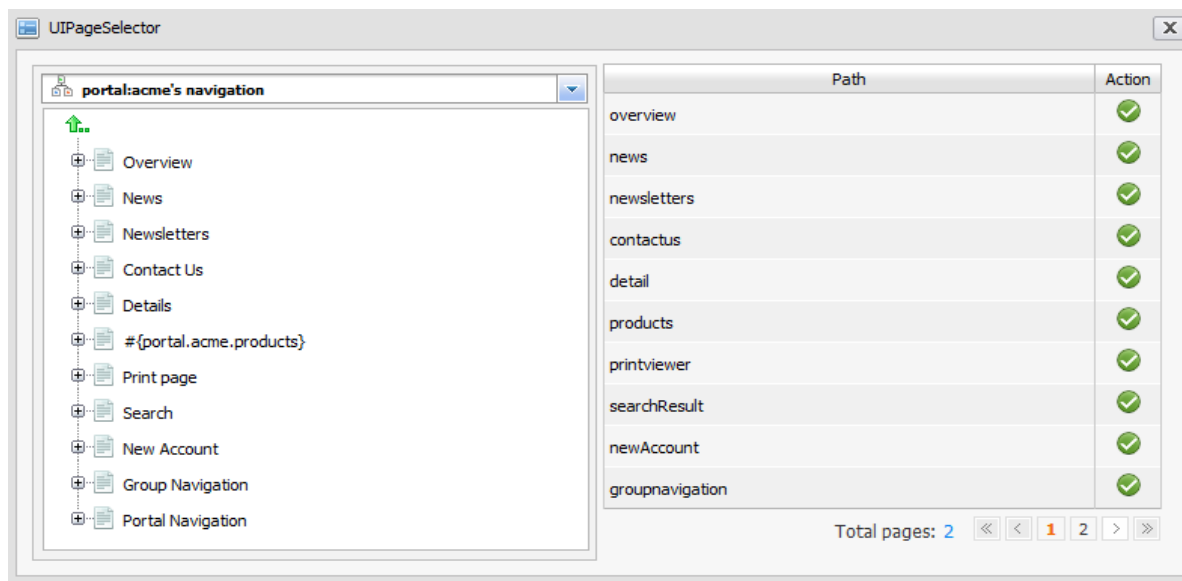




Illustration 112: The Page selector form

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.

5 Advanced Actions



This feature only supports users as administrators (root/gtn). In this part, we use this account (root/ gtn) to give the guide.

5.1 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.

5.1.1 Create a new site

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

Do as follows:

Step 1: Click **Site** on the administration bar and a list of existing portals will be listed:

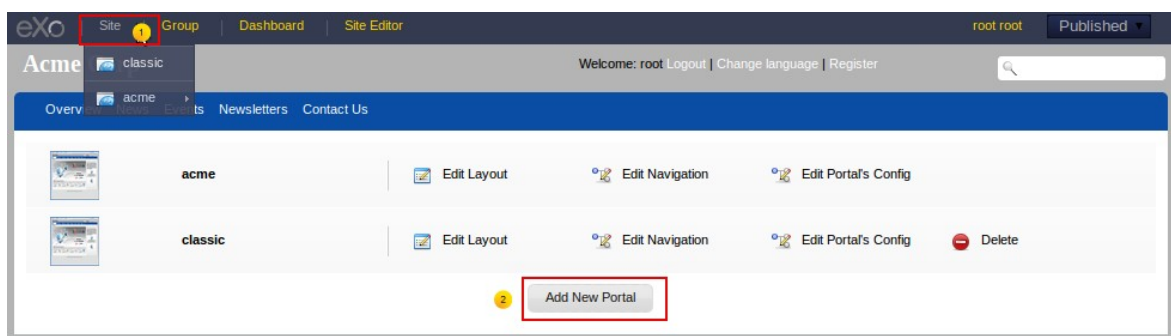


Illustration 113: The administration bar

Step 2: Click **Add New Portal** to open the **Add new portal** form with the available **Portal Setting** tab:

The screenshot shows a web form titled 'Add new Portal'. It has three tabs: 'Portal Setting' (selected), 'Properties', and 'Permission Setting'. Under the 'Portal Setting' tab, there are three required fields: 'Portal Name' (text input), 'Locale' (dropdown menu showing 'English'), and 'Skin' (dropdown menu showing 'Default'). Each field has an asterisk (*) indicating it is required. At the bottom of the form are 'Save' and 'Cancel' buttons.

Illustration 114: The Add new Portal form

Details:

(*) means that these fields are required to fill in.

| | |
|--------------------|--|
| 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 3: Enter a name for the portal in the **Portal Name** field.

Step 4: 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 is always enabled (which has a cost but the administrator will be aware of that)

The screenshot shows the 'Add new Portal' form with the 'Properties' tab selected. The 'Keep session alive' dropdown menu is open, showing three options: 'On Demand' (selected), 'Always', and 'Never'. 'Save' and 'Cancel' buttons are visible at the bottom.

Illustration 115: The Properties tab in the Add new Portal form

Step 5: Set the permission to edit and access 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:

The screenshot shows the 'Access Permission Setting' tab. At the top, there are three tabs: 'Portal Setting', 'Properties', and 'Permission Setting'. Below these, there are two sub-tabs: 'Access Permission Setting' (selected) and 'Edit Permission Setting'. The main content area has a checkbox labeled 'Make it public (everyone can access):'. Below this is a table with three columns: 'Group Id', 'Membership Type', and 'Action'. The table is currently empty, with the text 'Empty data' in the center. Below the table is a button labeled 'Add Permission'. At the bottom of the window are 'Save' and 'Cancel' buttons.

- Check the **Make it public** check box to assign the access permission to everyone.
- Or click the **Add Permission** button to assign the access permission to a specific group which is selected from the **Select Permissions** form. Do this by selecting a group on the left and a corresponding membership on the right:

The screenshot shows the 'Select Permission' form. It has a title bar with a close button. The form is divided into two main sections. The left section is titled 'Browse and select a group' and contains a list of groups: 'Customers', 'Organization', 'Partners', and 'Platform'. Each group is preceded by a plus sign and a group icon. The right section is titled 'Select a Membership' and contains a list of membership types: 'member', 'author', 'editor', 'manager', 'redactor', 'validator', and '*'. Each membership type is preceded by a right-pointing arrow. A vertical scrollbar is visible on the right side of the membership list.

Illustration 116: The Select Permission form

After selecting groups, the access permission list is displayed:



Illustration 117: 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.

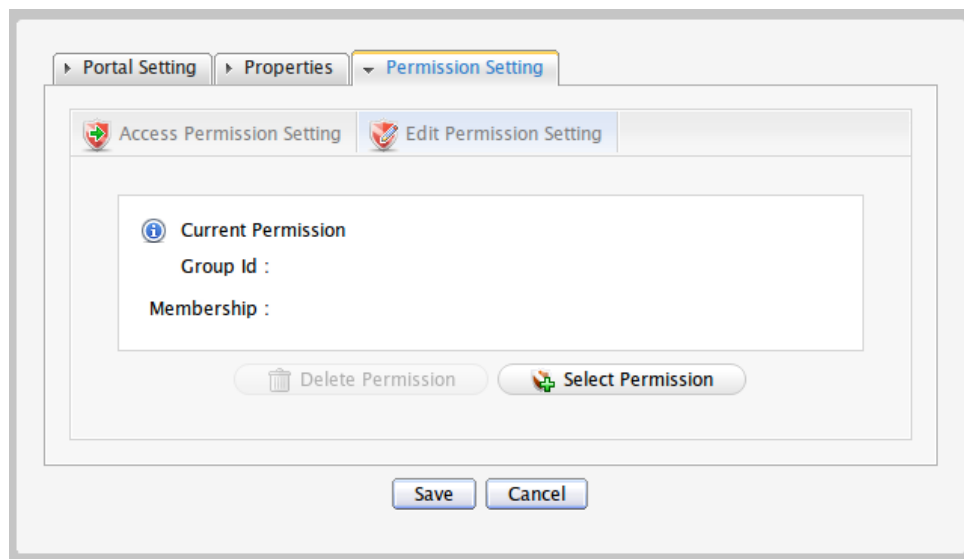


Illustration 118: The Edit Permission Setting tab

- Click the **Select Permission** button to assign the edit permission to a group with a specific membership which is selected from the **Permission Selector** form.
- Select a group on the left panel and a corresponding membership on the right panel:

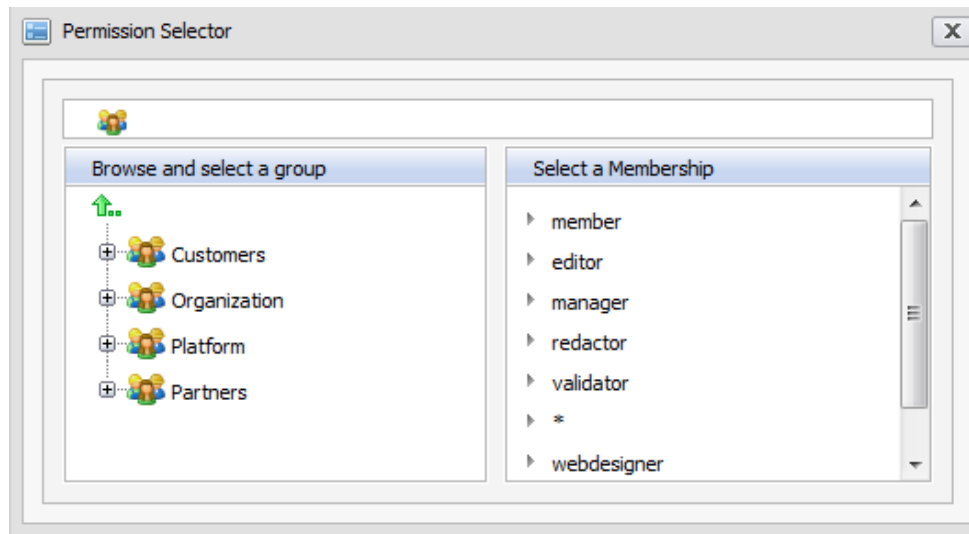


Illustration 119: Permission Selector form

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:

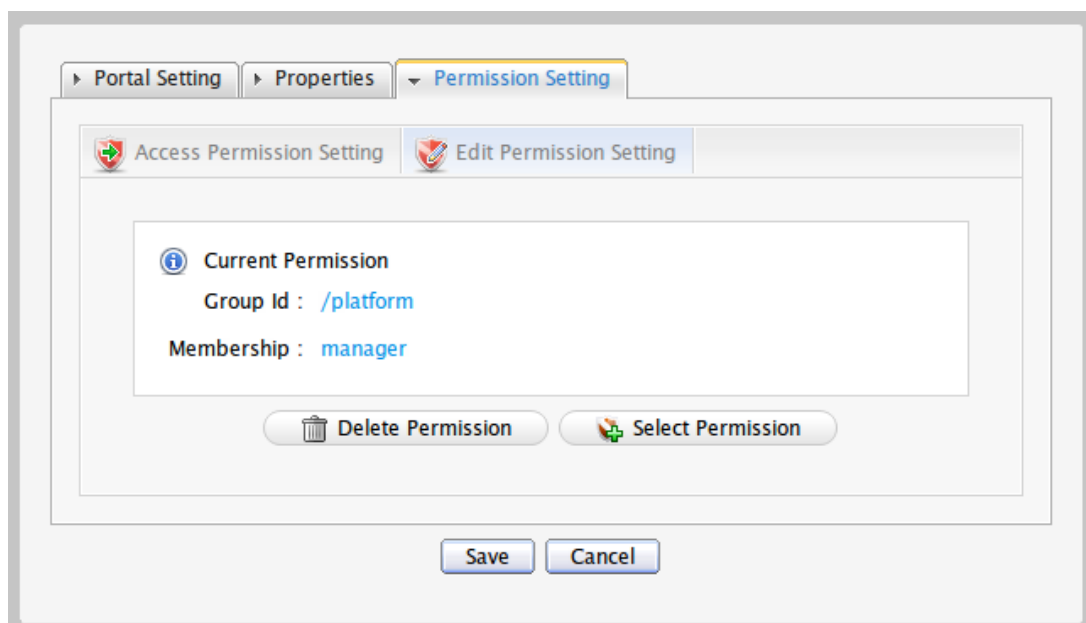


Illustration 120: The Current Permission with the detailed information

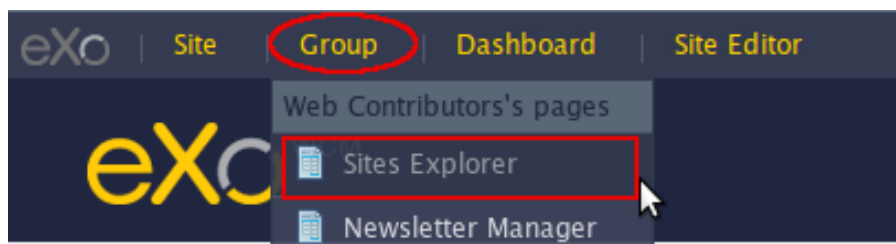
The edit permission is assigned for only one group at one time. You can click **Delete**

Permission to remove the current edit permission of the selected group or re-assign the edit permission to another group by re-clicking **Select Permission** 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 existing 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** on the administrator bar.



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

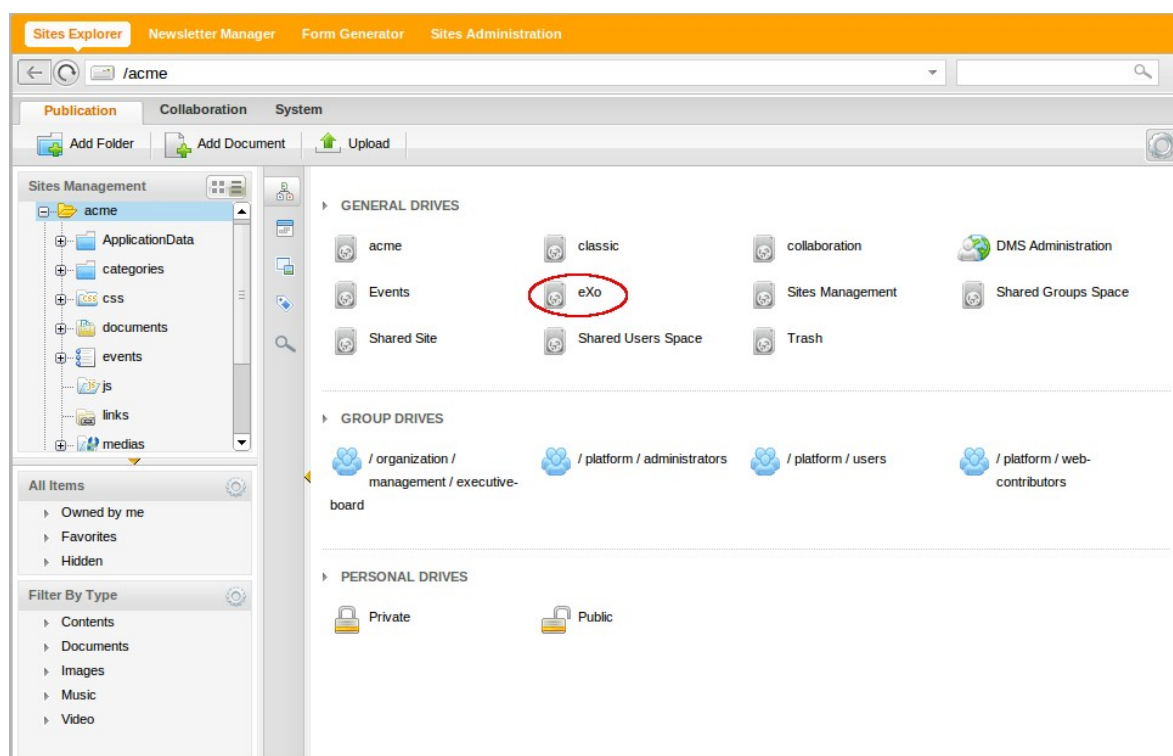


Illustration 121: Drives in Sites Explorer page

5.1.2 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.

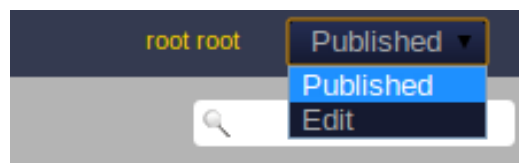
You have two modes:

- *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.

5.1.2.1 Turn on the edit mode of the site

After signing in, you will see two statuses (Published/Edit) of the edit mode on the Administration bar. By default, the status is "Published" like the illustration 1. It means that you only view the current site without editing the layout component of the site:

To switch between two statuses "Published" and "Edit", just click **Published** at the top right corner of the portal to open the status list and select the mode you want:



When your site is switched to the **Edit** mode, you are able to edit any components of your site, add content, manage content and change the preferences of the single content directly.

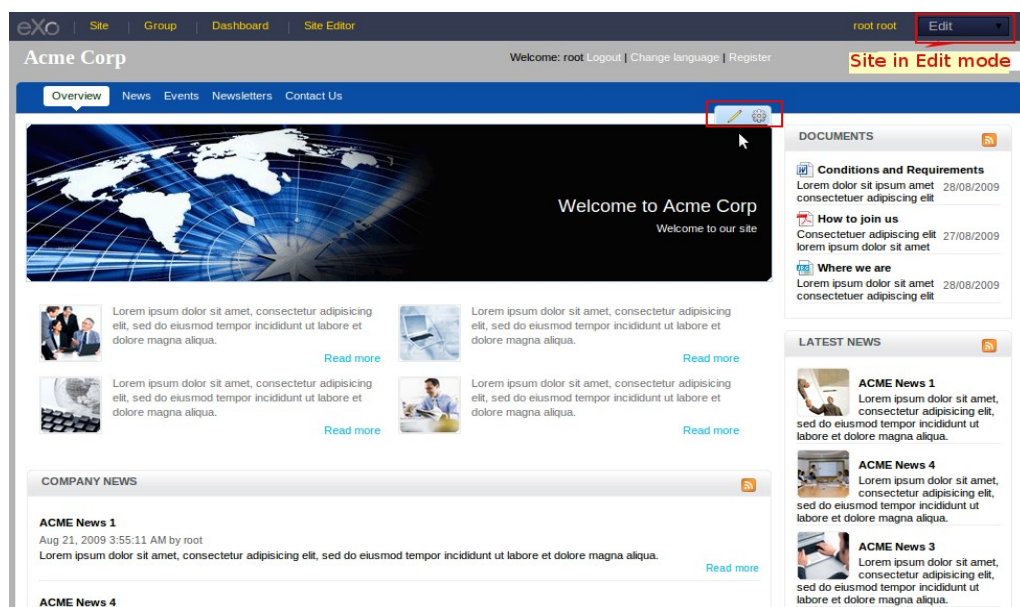


Illustration 122: The site in Edit status

5.1.2.2 Web content structure

The interface of a site can be divided into five parts like the illustration 1 and each part is a

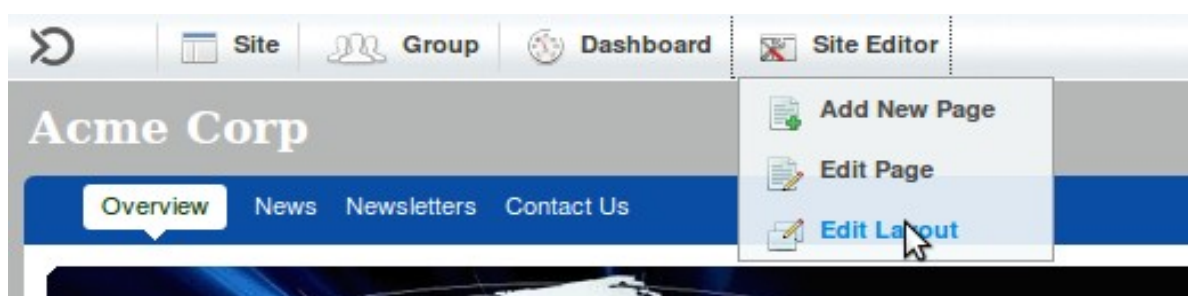
single content viewer (SCV) so that it also includes all default elements of a web content.

5.1.2.3 How to edit a site?

- ✓ To edit a site, do as follows:

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 123: 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 |

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:

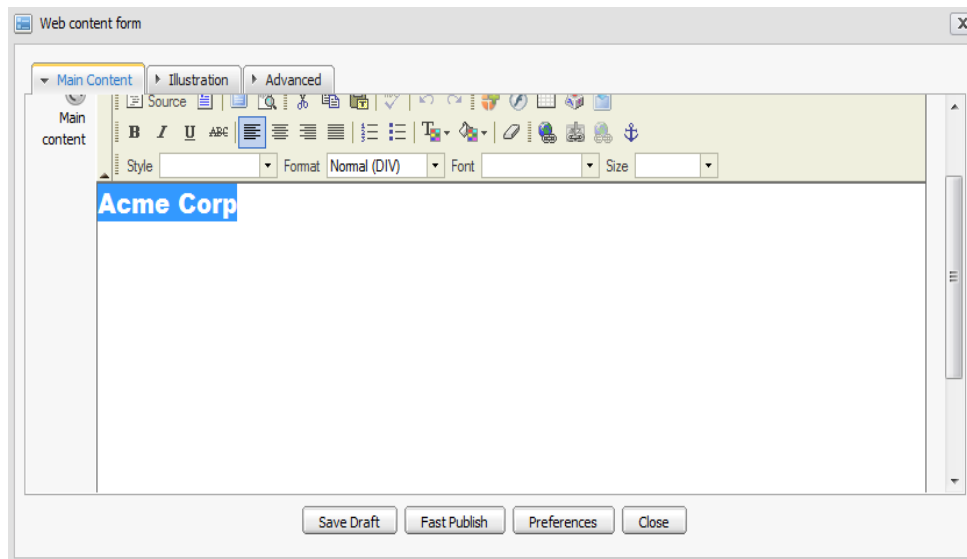


Illustration 124: Edit left Banner

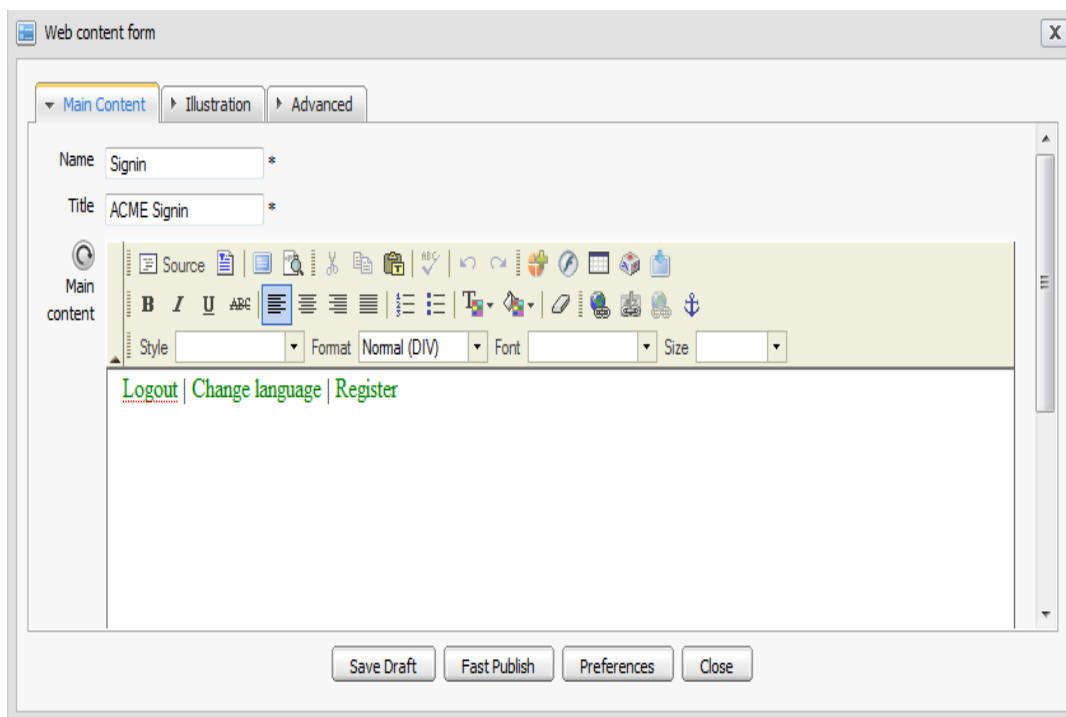


Illustration 125: Edit right banner

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

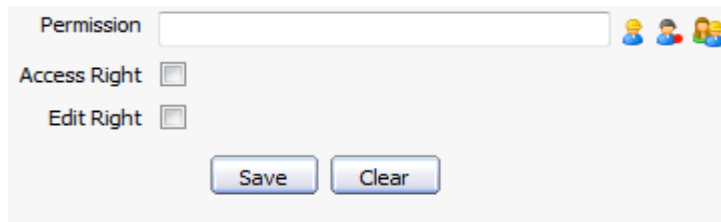
Access Right ☐


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:





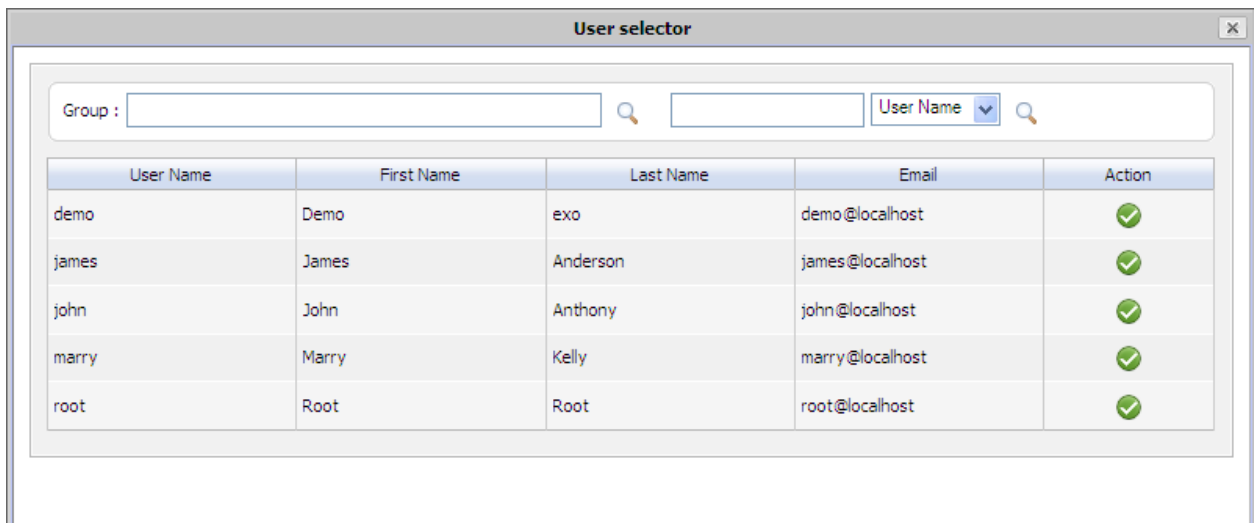
Permission 

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 | 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 126: 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.

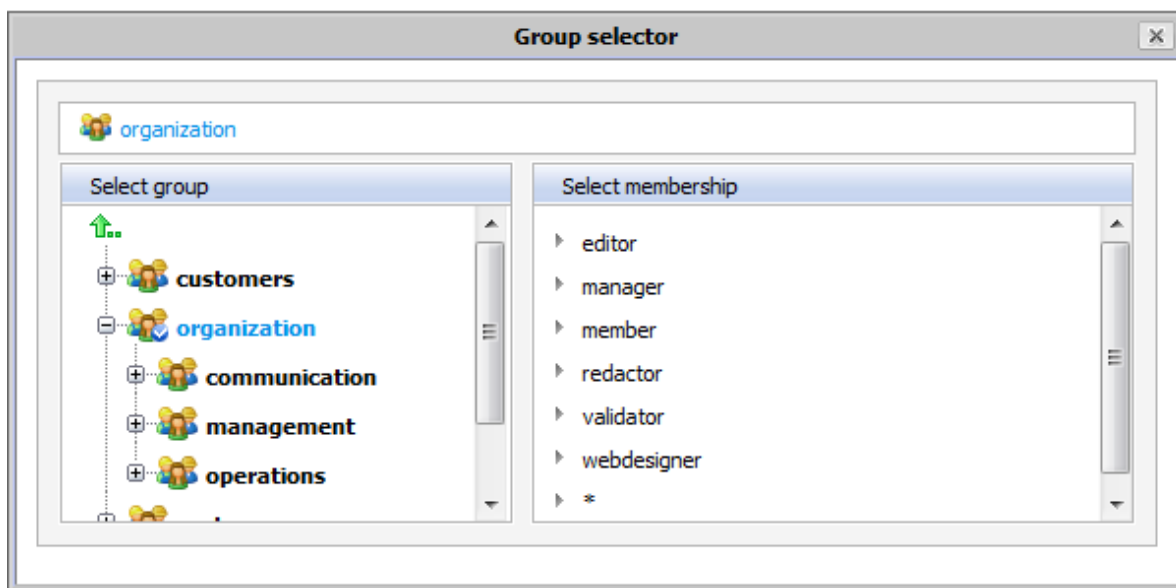



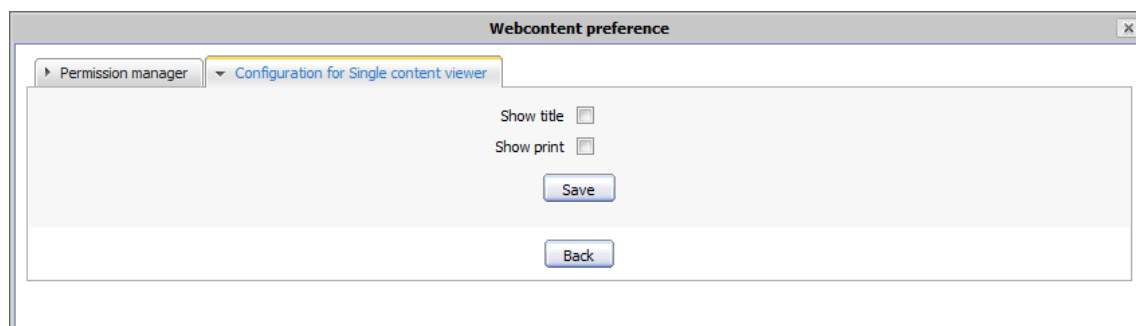
Illustration 127: The Group selector form

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:

Illustration 128: 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:

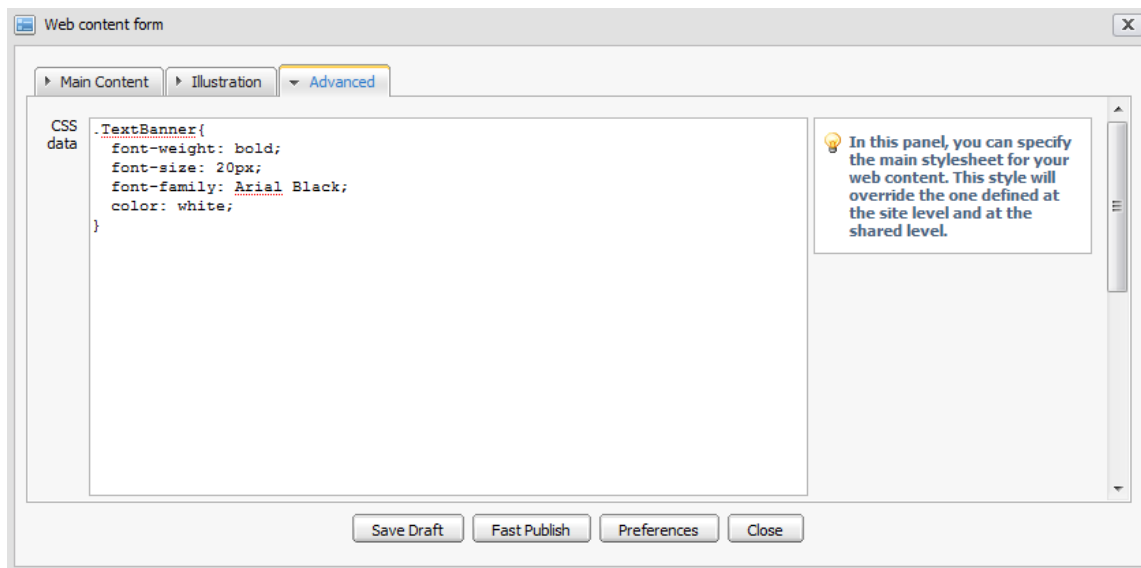


Illustration 129: The Advanced tab in the Web content form


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.

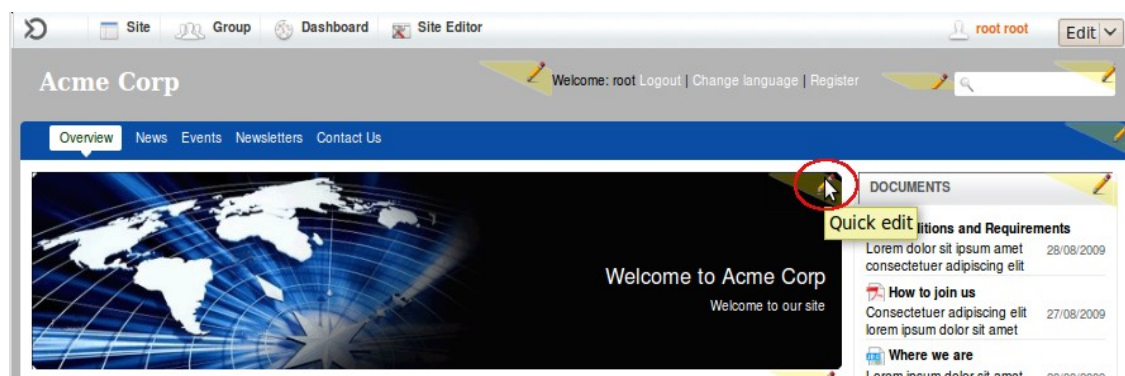
JS data: It contains JS content to make the web content dynamically when being published. You can optionally enter JS content in this field.

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:

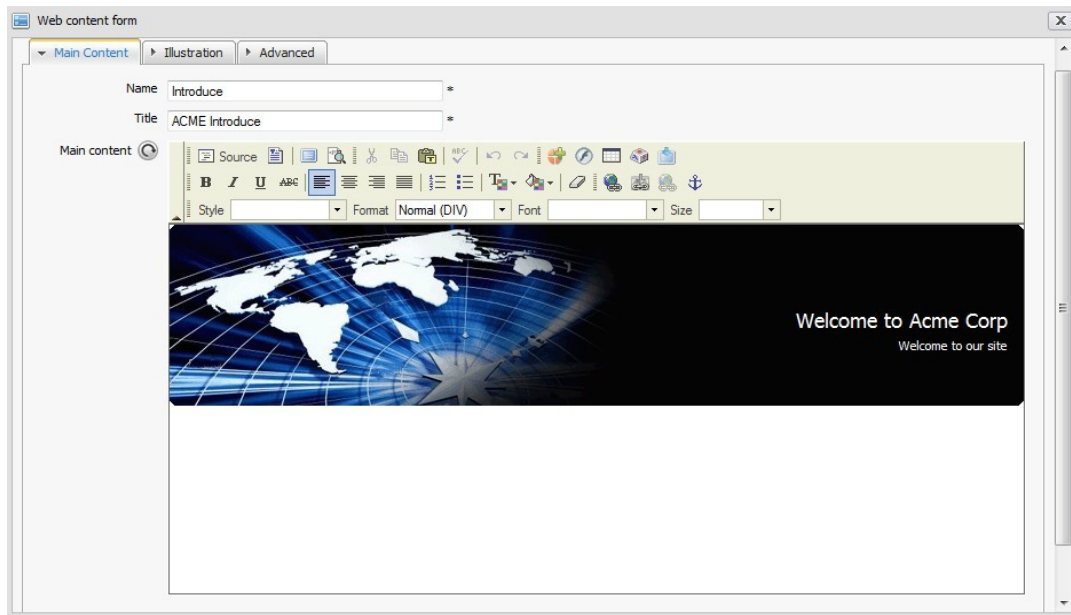


Illustration 130: The Edit homepage form in Single Content Viewer

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 as follows:

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 131: 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

5.1.3 Switch between sites

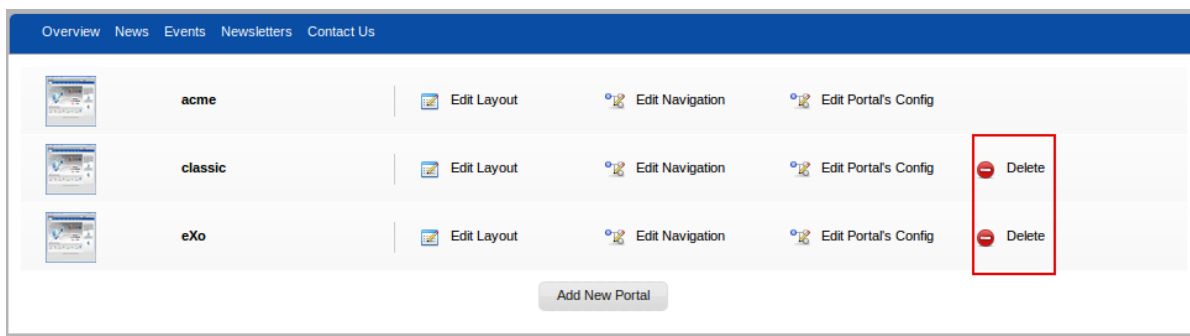
This function is used to change the current web site by another one. See view a site to more details.


5.1.4 Delete a site

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

Do as follows:

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




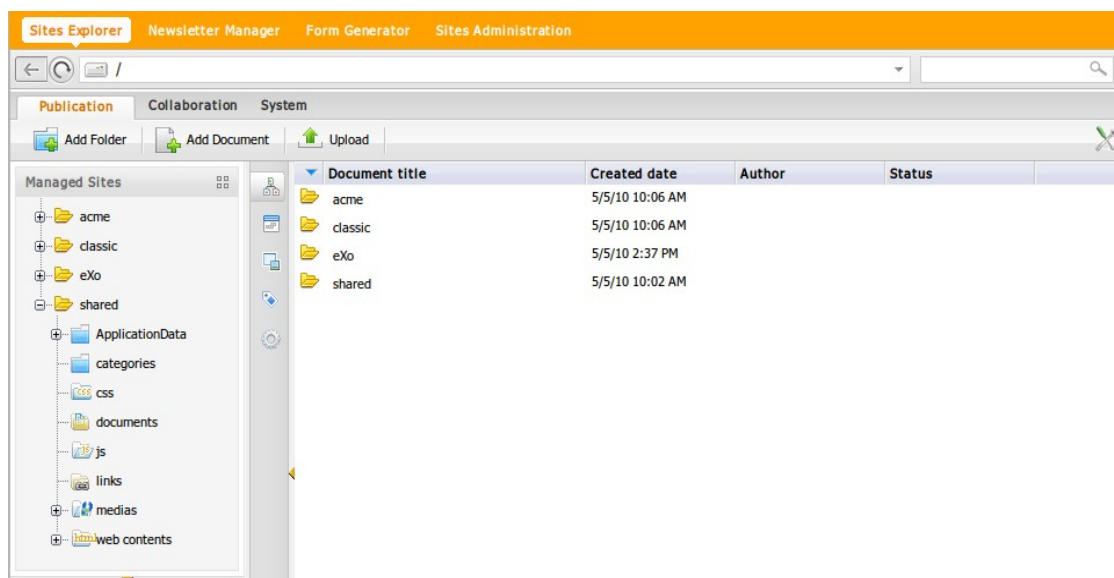
Step 2: Click  **Delete** corresponding to the portal that you want to delete.

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


5.2 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 that are site resources:

| | | |
|---|--------------|------------------|
|  | 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 |

5.2.1 CSS Folder

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.

5.2.2 Document Folder

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 132: Example of a
'Documents' folder

5.2.3 JS Folder

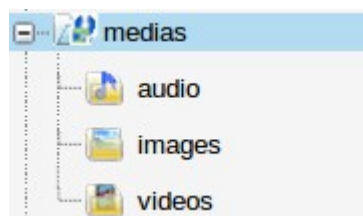
This is one of default files of a site. This file contains Java Script data that is used to make a site more animated and more dynamic.

5.2.4 Links Folder

This file contains all links used in a site.

5.2.5 Media Folder

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.

5.2.6 Web content Folder

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.

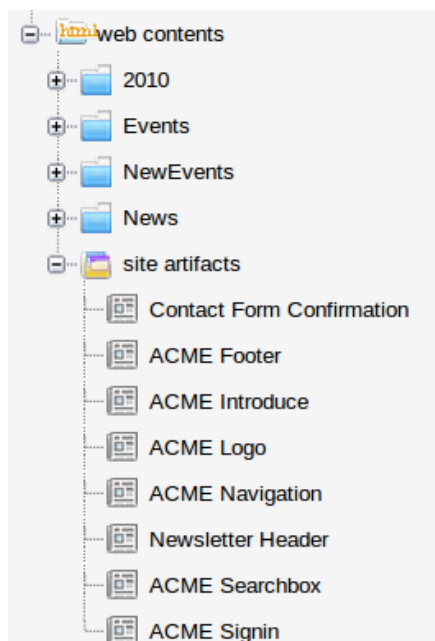
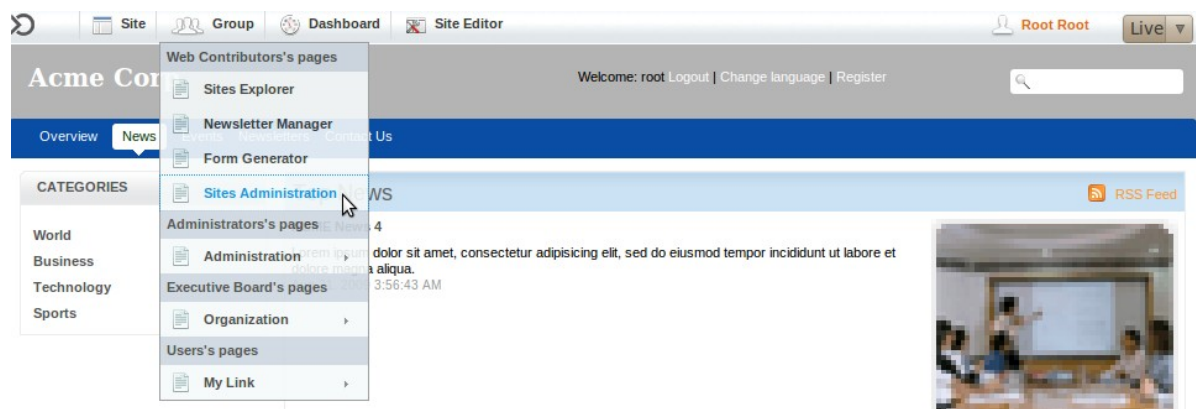


Illustration 133: Example of a 'Web content' folder

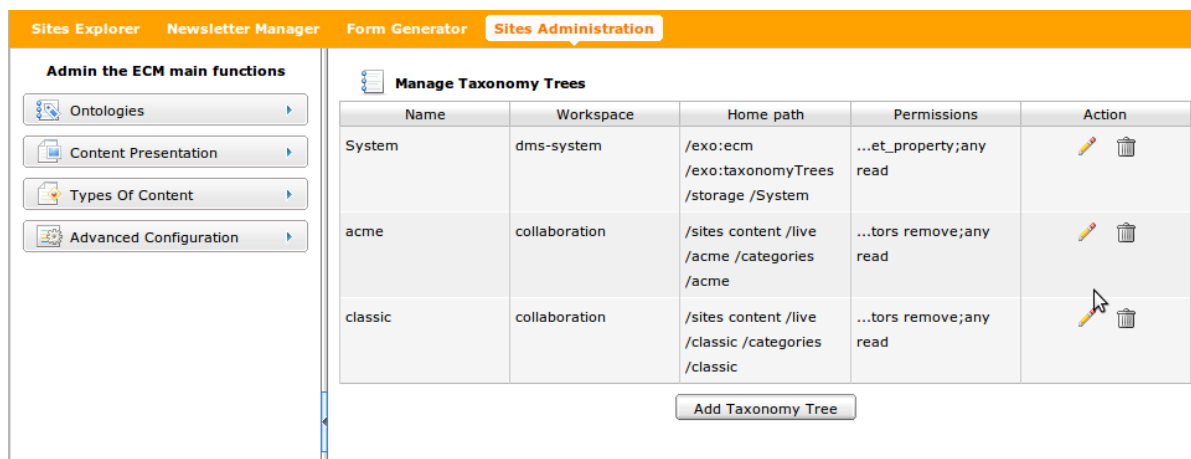
5.3 Sites Administration

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.

5.3.1 Ontology

5.3.1.1 Folksonomy Management

The Folksonomy enables 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.**

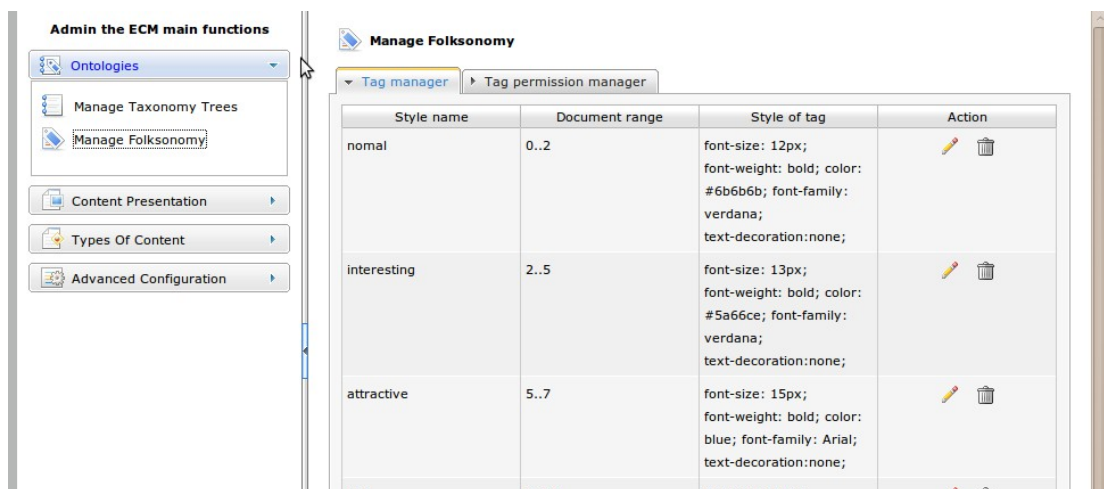


Illustration 134: The Manage Folksonomy form

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:

Edit tag style configuration

Style name: *

Document range: *

Html style: *

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.

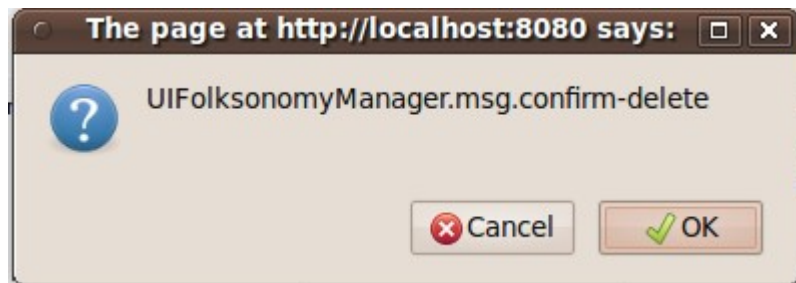
Step 3: Click **Update** to save new changes, or **Cancel** to quit this form without changing.



- 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.

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:

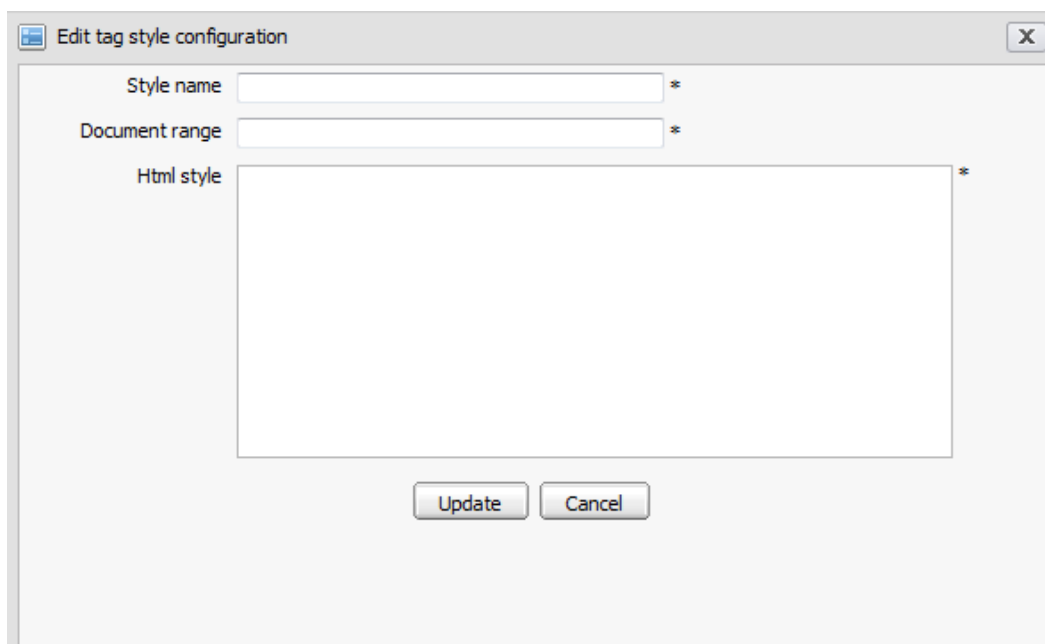


Click **OK** to accept deleting, or **Cancel** to quit without deleting the tag style.

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:



Style name *

Document range *

Html style *

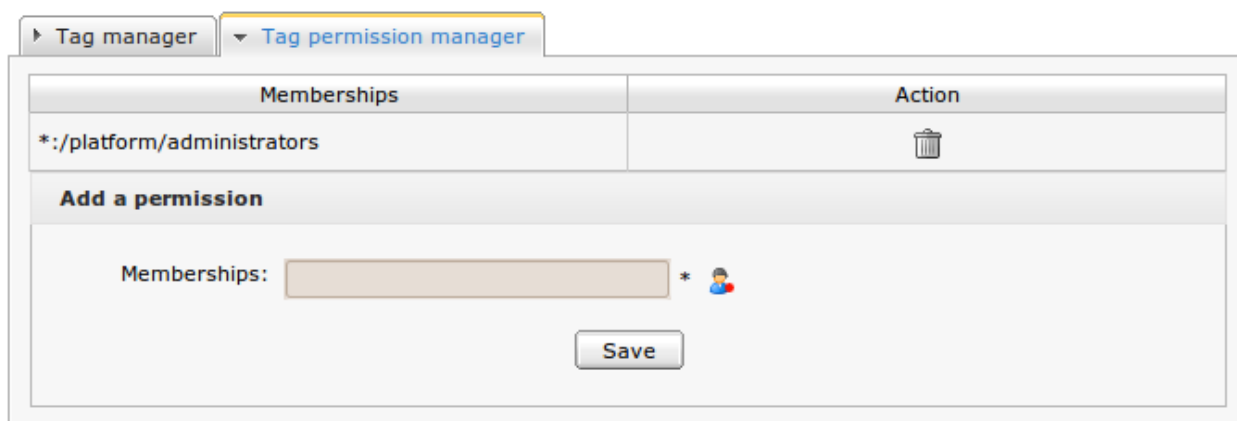
Update Cancel

Illustration 135: 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.



| Memberships | Action |
|----------------------------|--------|
| *:/platform/administrators | |

Add a permission

Memberships: *

Save

Step 4: Click the icon to select memberships in order to add a permission for those memberships. The **Select membership** form will appear:

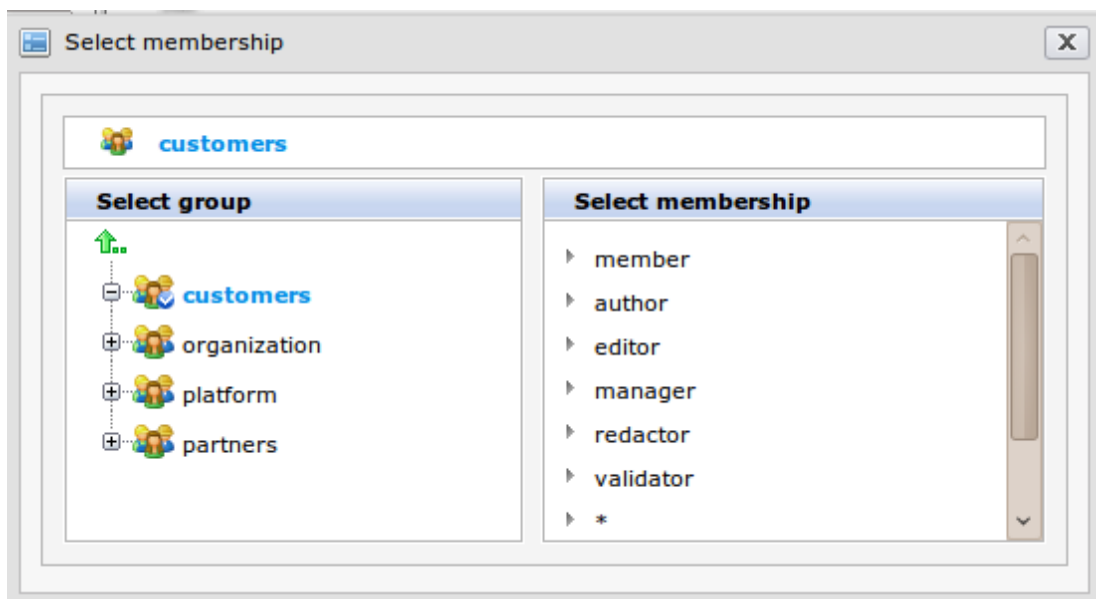
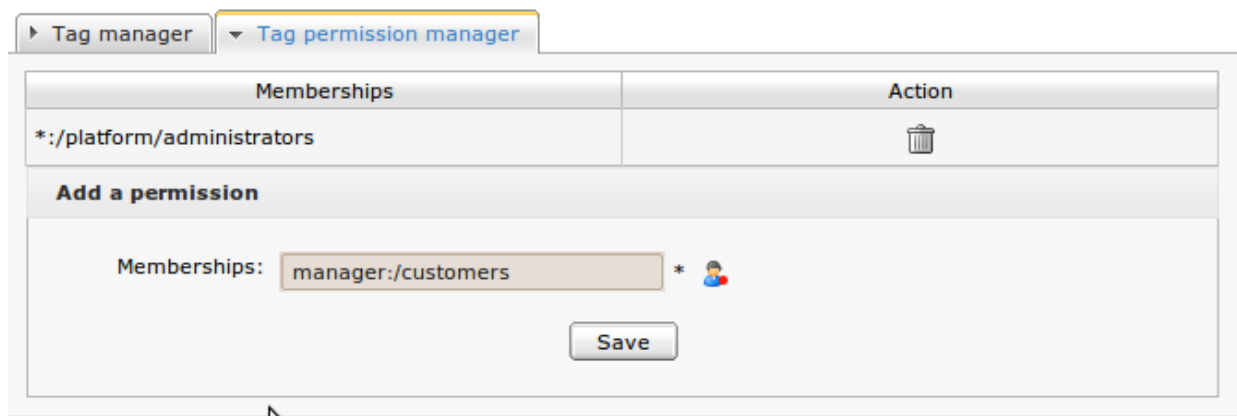
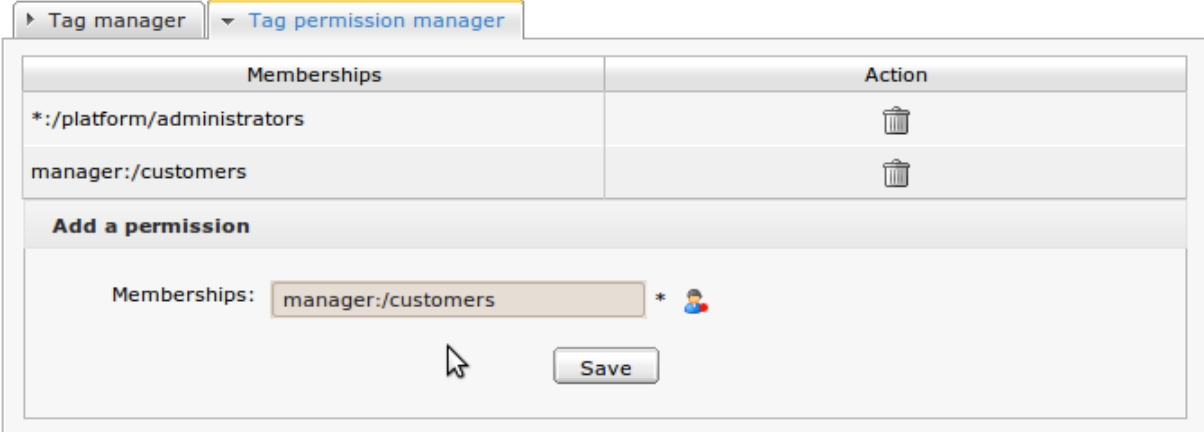




Illustration 136: The Select membership form

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.

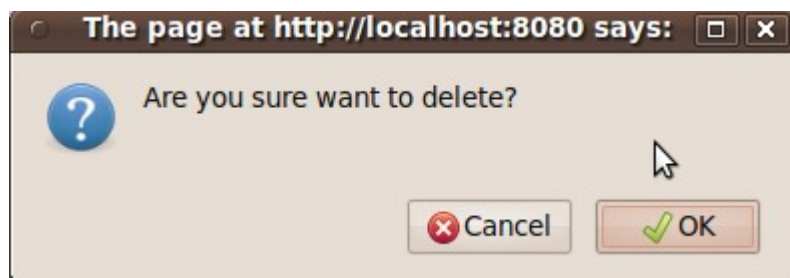


| Memberships | Action |
|---------------------------|---|
| */platform/administrators |  |
| manager:/customers |  |

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.

5.3.1.2 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 and categories.

Go to **Sites Administration | Ontologies Manage Taxonomy Trees**.

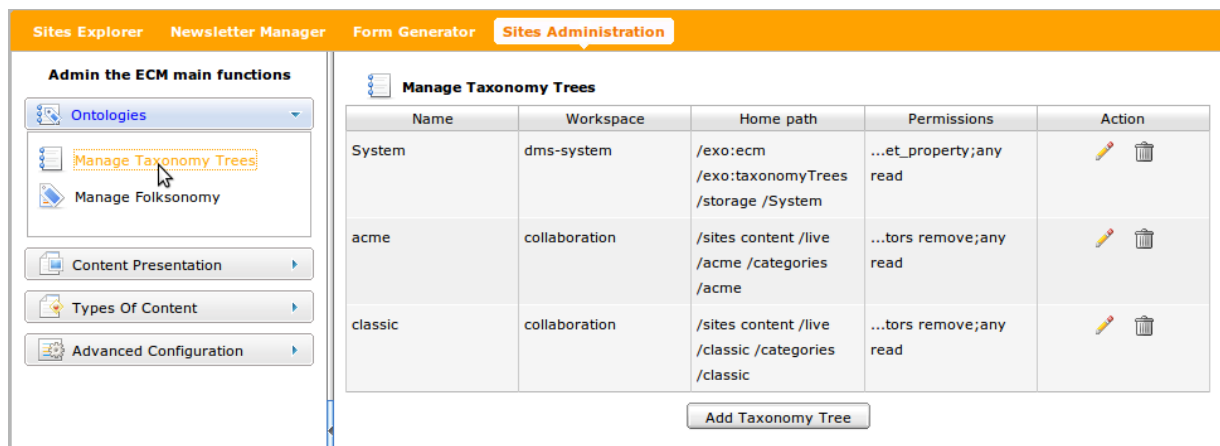


Illustration 137: Manage Taxonomy Trees

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 'Add taxonomy tree' form is displayed. It contains the following fields and buttons:

- Name:** A text input field with an asterisk (*) indicating it is required.
- Workspace:** A dropdown menu with 'dms-system' selected.
- Home path:** A text input field with a green plus icon next to it.
- Buttons:** 'Reset', 'Next', and 'Cancel'.

Illustration 138: 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 139: 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.

Add 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 ☐

Previous Save Reset Next

Cancel

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).

Need more explanation for lifecycle...

Nodetypes?

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: !, @, #, \$, %, &, *, (,).*

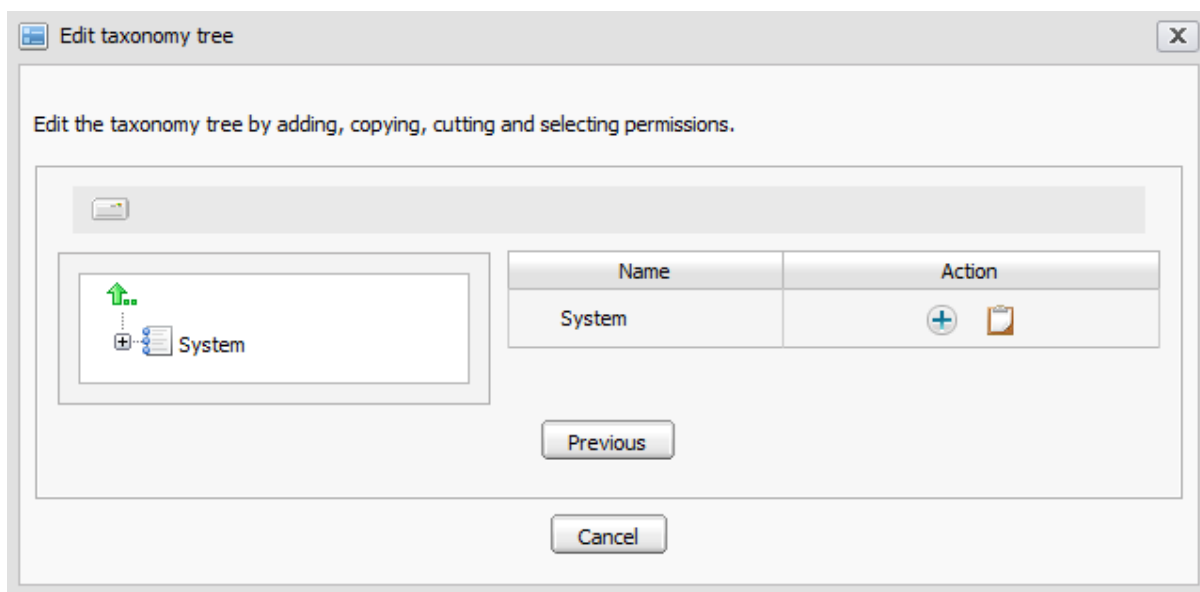
Do not add a taxonomy which has the same name and level with existing taxonomies in a node.

The taxonomy name must contain less than 30 characters.

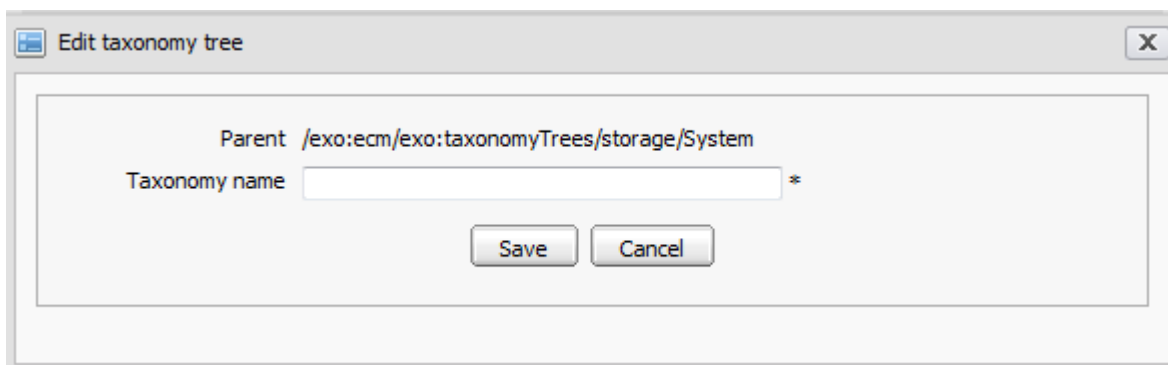
Edit a Taxonomy Tree

Do the following:

Step 1: Click  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.




















5.3.2 Content Presentation Management

5.3.2.1 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**.



| 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 140: The Manage Templates form

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**:

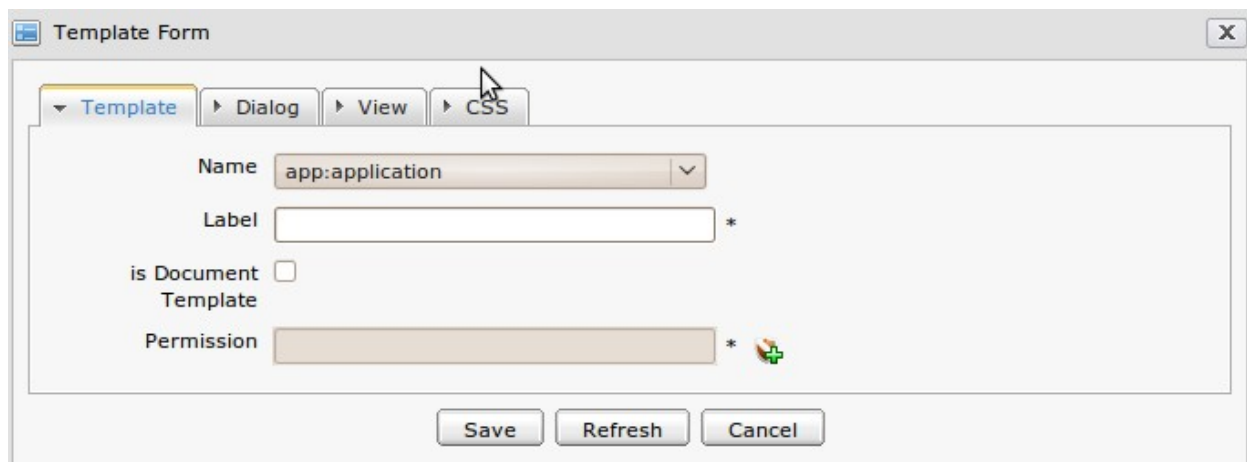
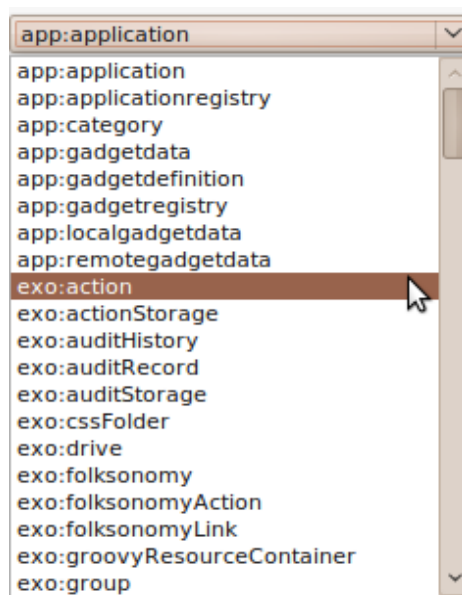


Illustration 141: The New Template form


(*): 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:

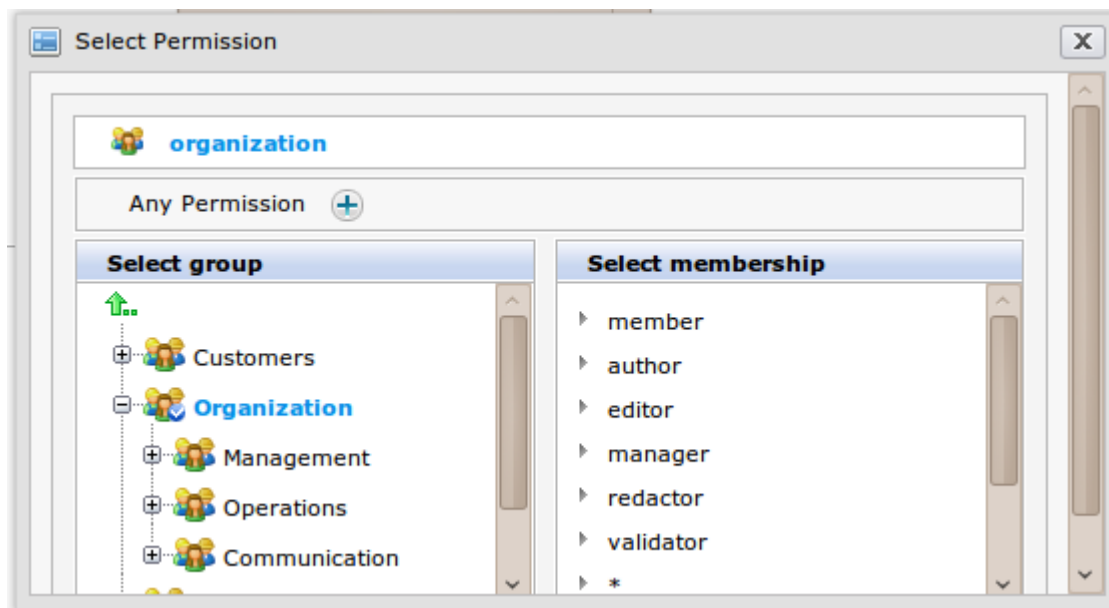


Illustration 142: The Select Permission form

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..

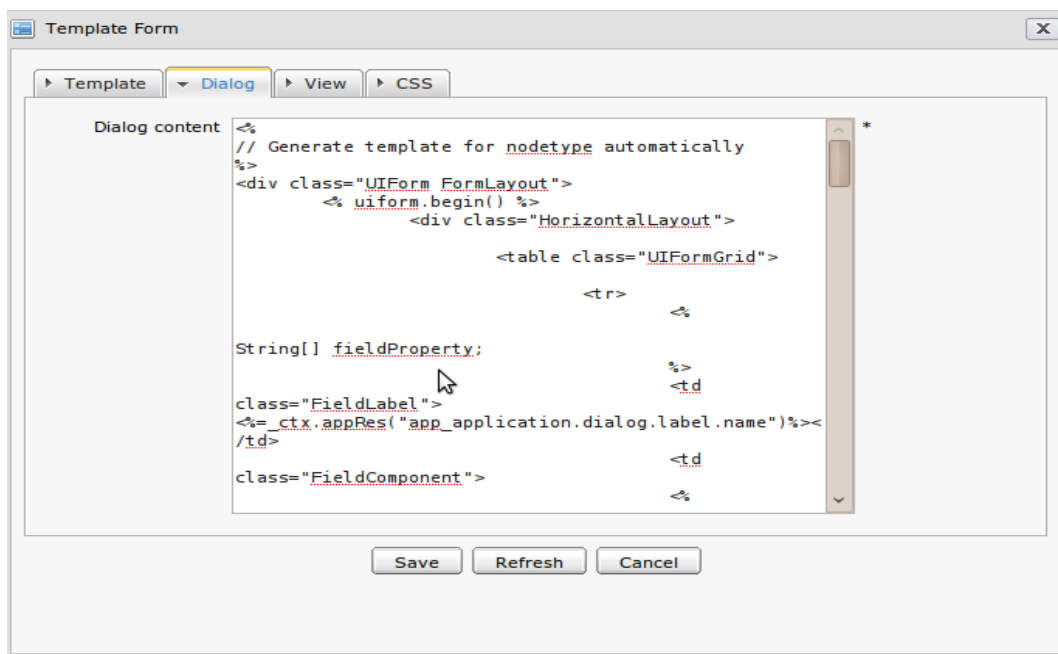


Illustration 143: The Dialog tab

Step 8: Select the **View** tab and enter values in the **View content** field.

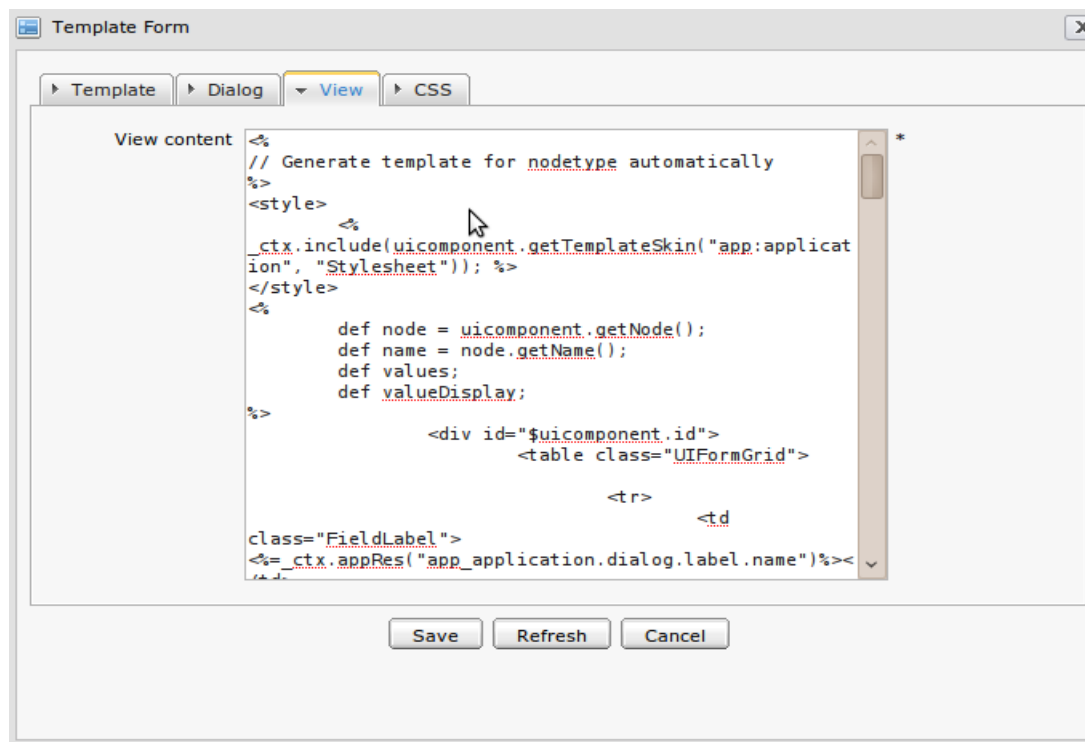


Illustration 144: The View tab

Step 9: Select the **CSS** tab and enter values into the skin field. (Not required).

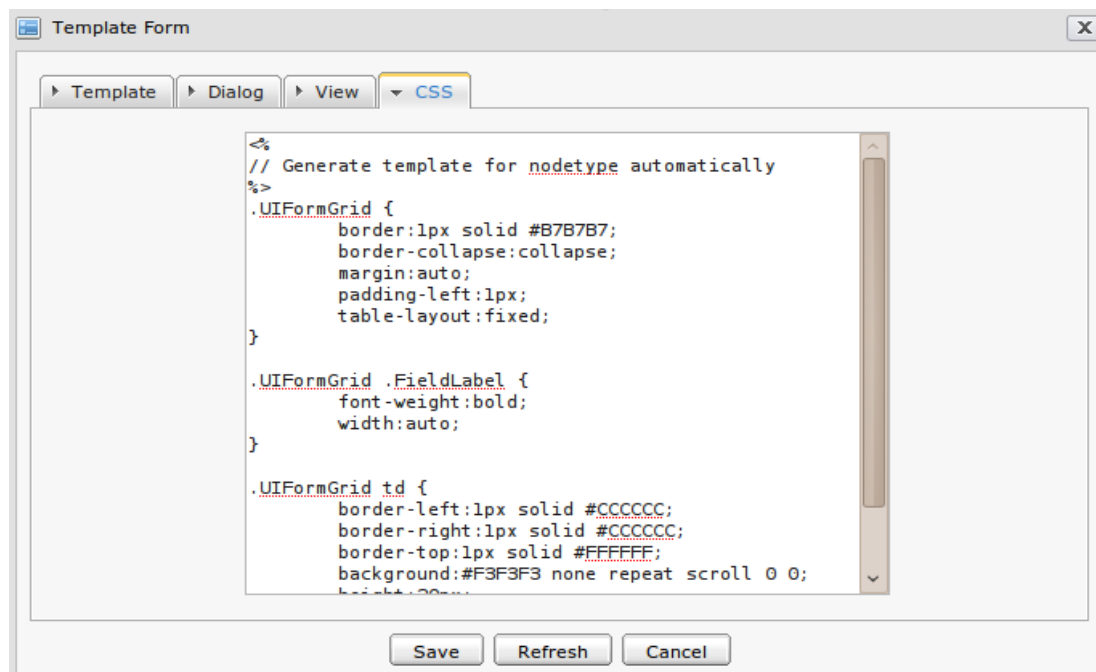



Illustration 145: The CSS tab

Step 10: Click **Save** to accept adding a new template.

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:

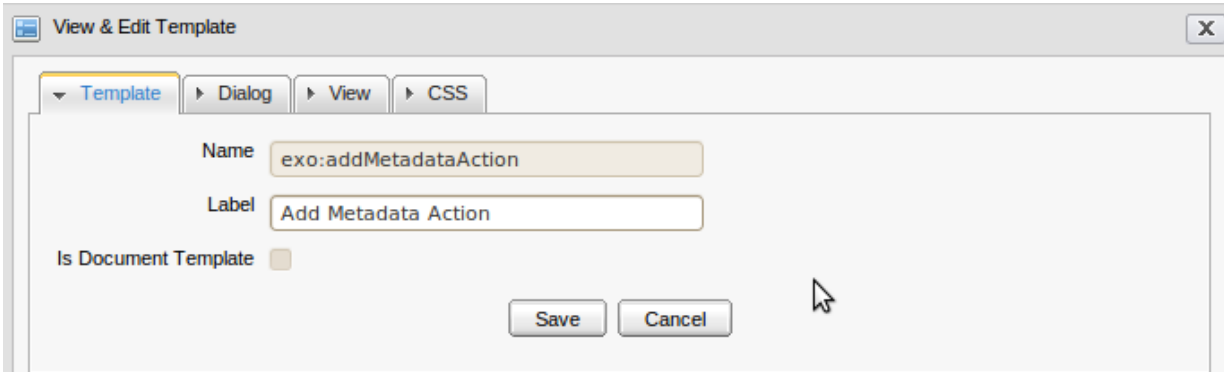
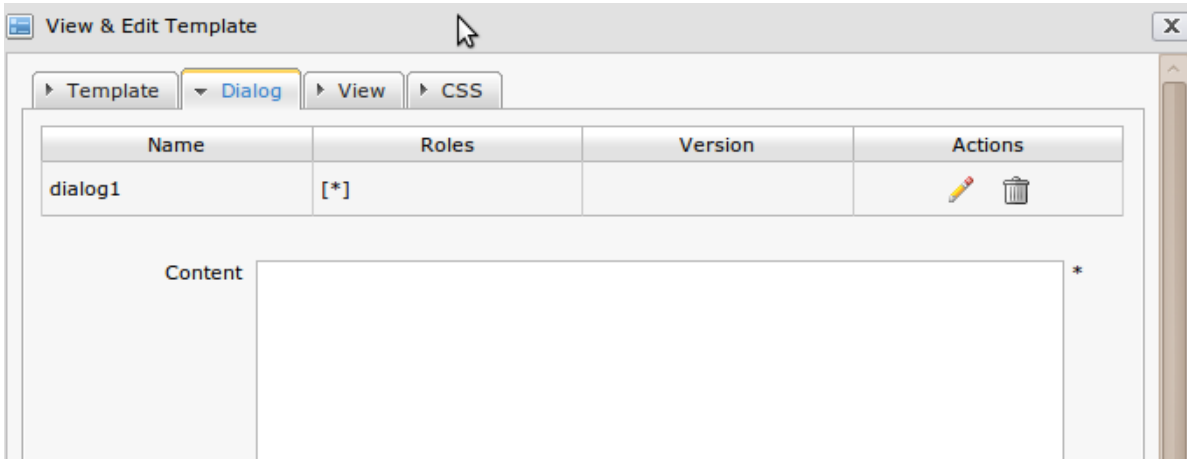


Illustration 146: The View & Edit Template form

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.




- 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.

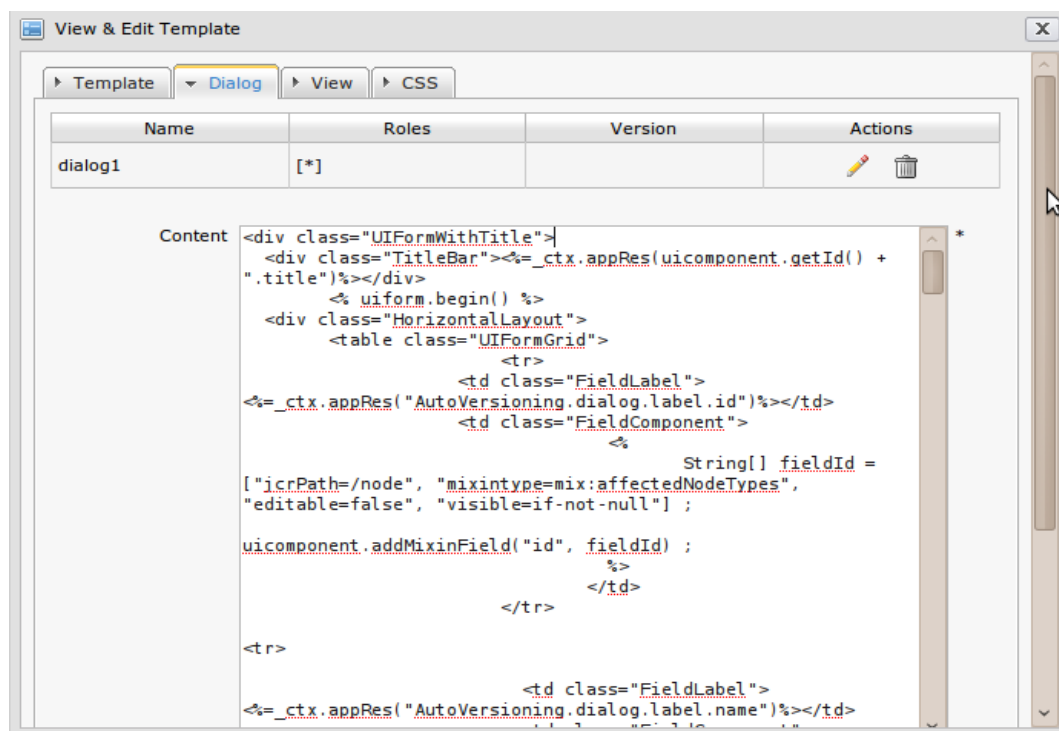


Illustration 147: The Edit a dialog form

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.

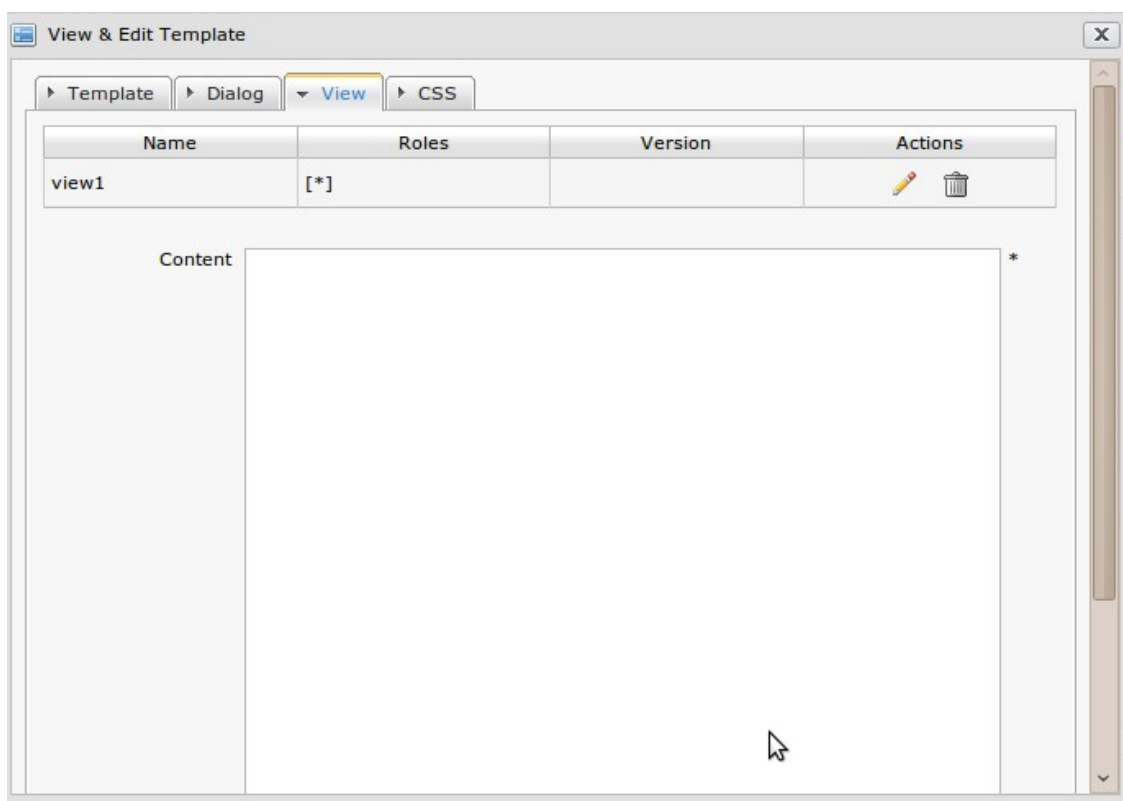
If the dialog has at least 2 versions, in the **Dialog** tab, it will display **Restore** button that allows restoring the dialog version.

- ✓ To delete a dialog, do as follows:

Step 1: Click  corresponding to the dialog that you want to delete.

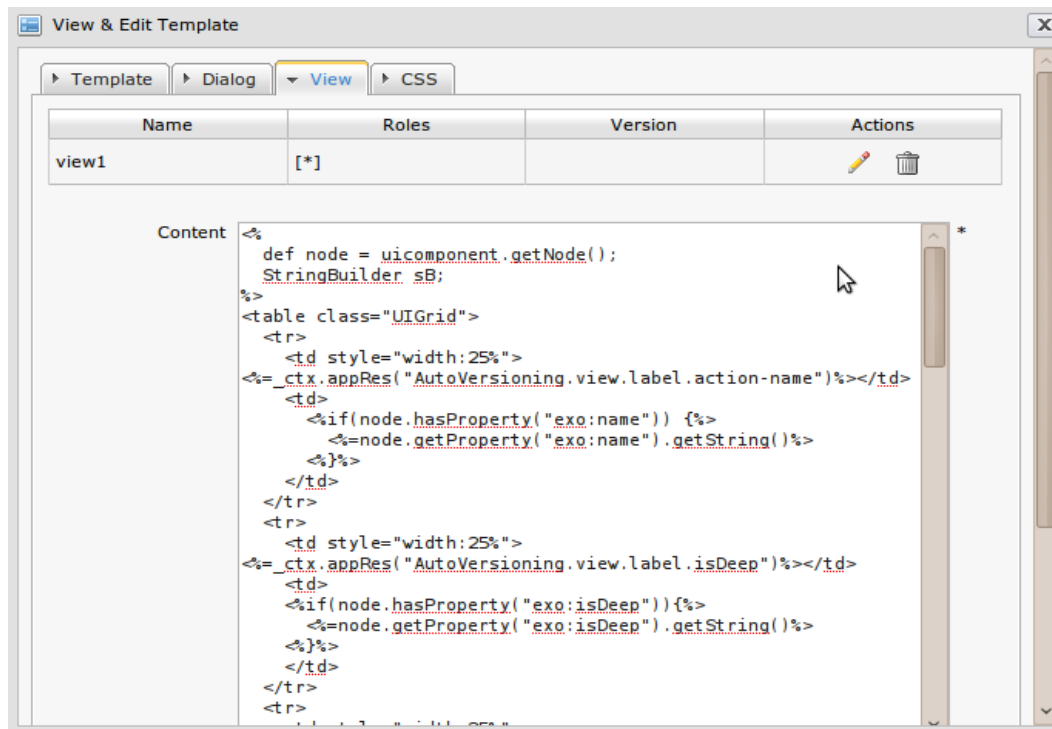
Step 2: Click **OK** on the confirmation message to accept deleting, or **Cancel** to discard this action.

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).

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.

5.3.2.2 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.

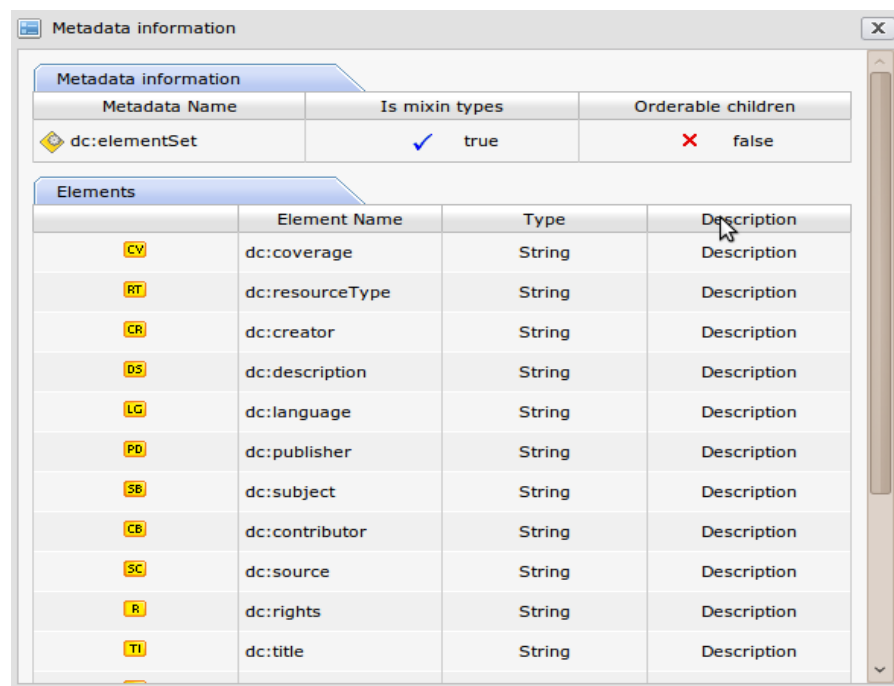
Go to **Sites Administration | Content Presentation | Manage Metadata**.

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 | String | Description |
| RT | String | Description |
| CR | String | Description |
| DS | String | Description |
| LG | String | Description |
| PD | String | Description |
| SB | String | Description |
| CB | String | Description |
| SC | String | Description |
| R | String | Description |
| TI | String | Description |

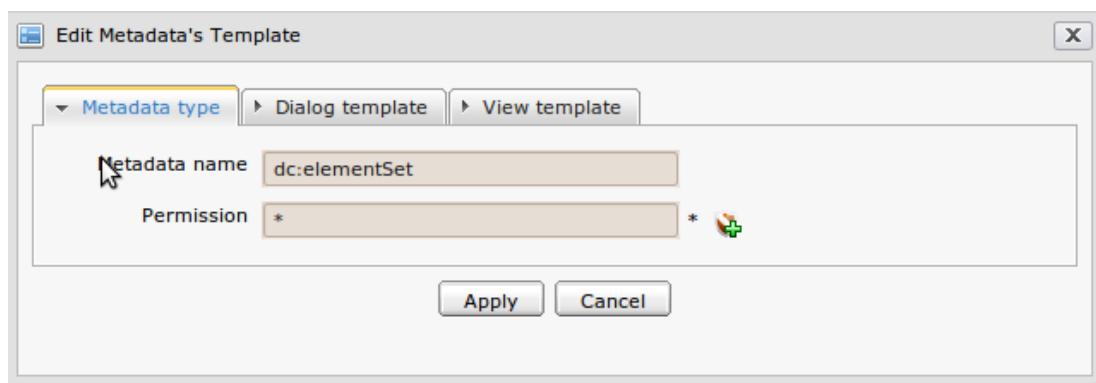
Illustration 148: The Metadata information form

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 149: 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.

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.

5.3.2.3 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 | | | | |
|--------------------------------------|--------------------------------|--|--------------|---|
| 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] | |    |
| Add View | | | | |

Illustration 150: The manage view form

Views tab

- **Add a new view**

The function is used to add a new view. Do the following:

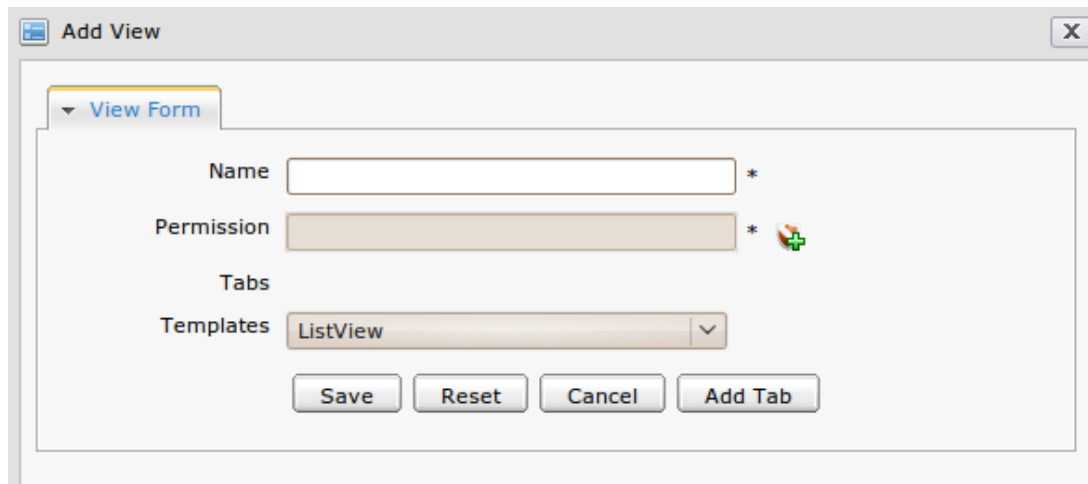


Illustration 151: The Add View form


Step 1: Click the **Add View** at the bottom of the **View** tab to show the **Add View** form like below:

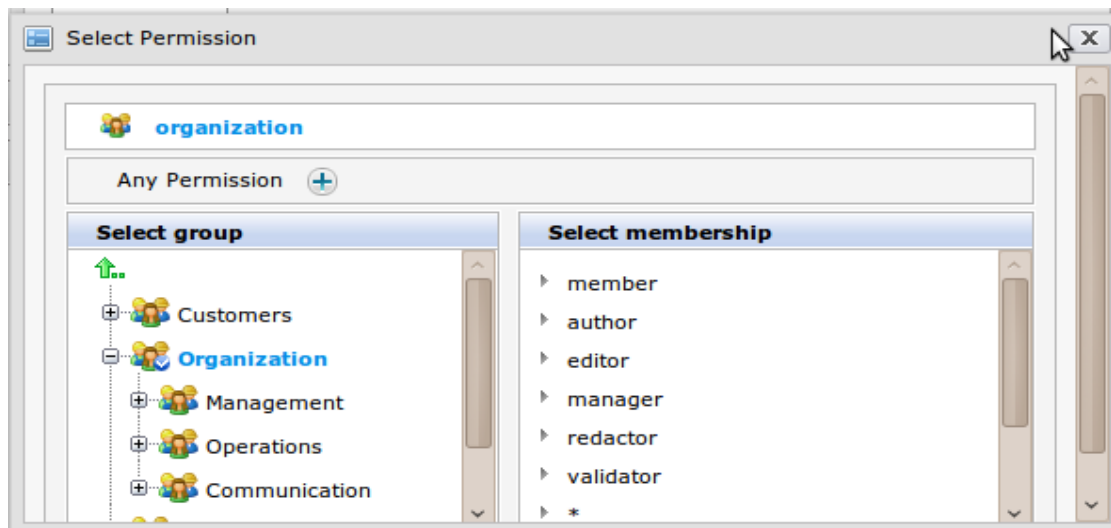
Step 2: Enter the new view name in the **Name** field. (*Required).



The name must be unique.

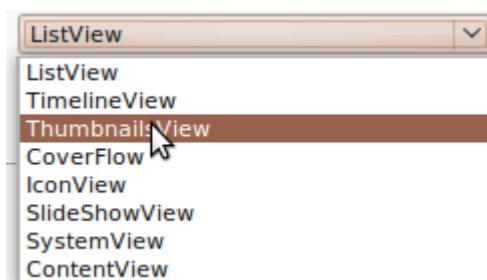
*The name must not contain special characters like !, @, #, \$, %, &, *, (,).*

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.



- 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:

Illustration 152: The View form

Step 2: Click **Close** to exit the View form.

- **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:

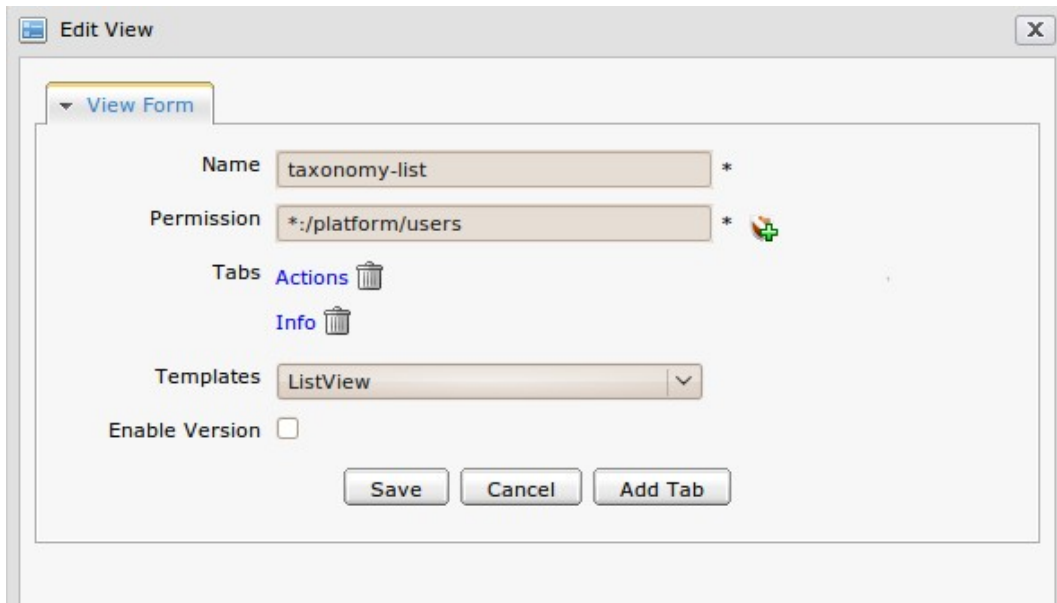


Illustration 153: The Edit View form

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.

- **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.

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 154: ECM Templates

- **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:

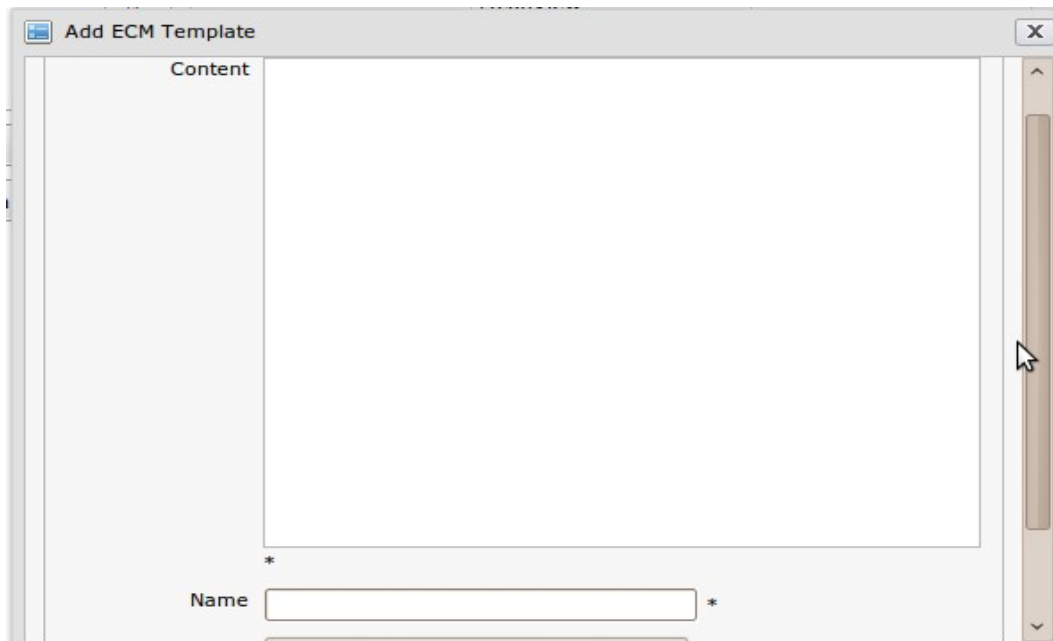


Illustration 155: The Add ECM Template form

(*):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.

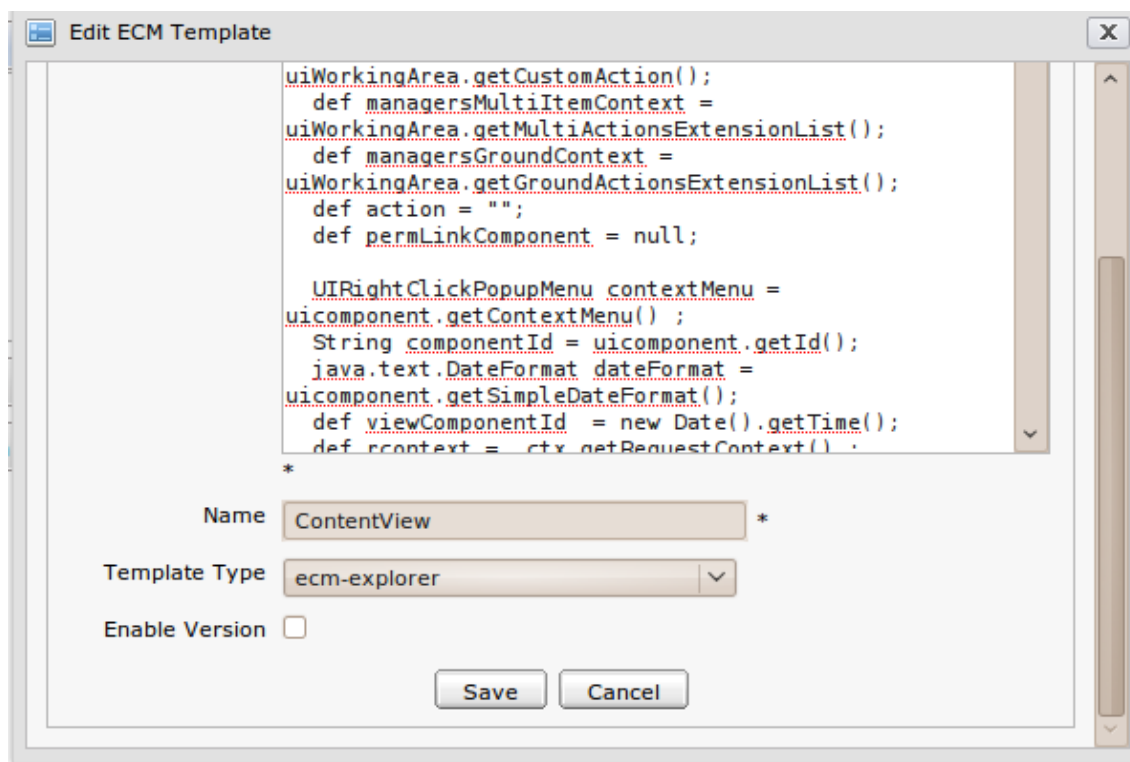
*The name must not contain special characters like !, @, #, \$, %, &, *, (,).*

- **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 156: 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.*

- 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.

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 157: BC Templates

- Add a new BC Template

Do as follows:

Step 1: Click **Add** to open the **Add BC Template** form:

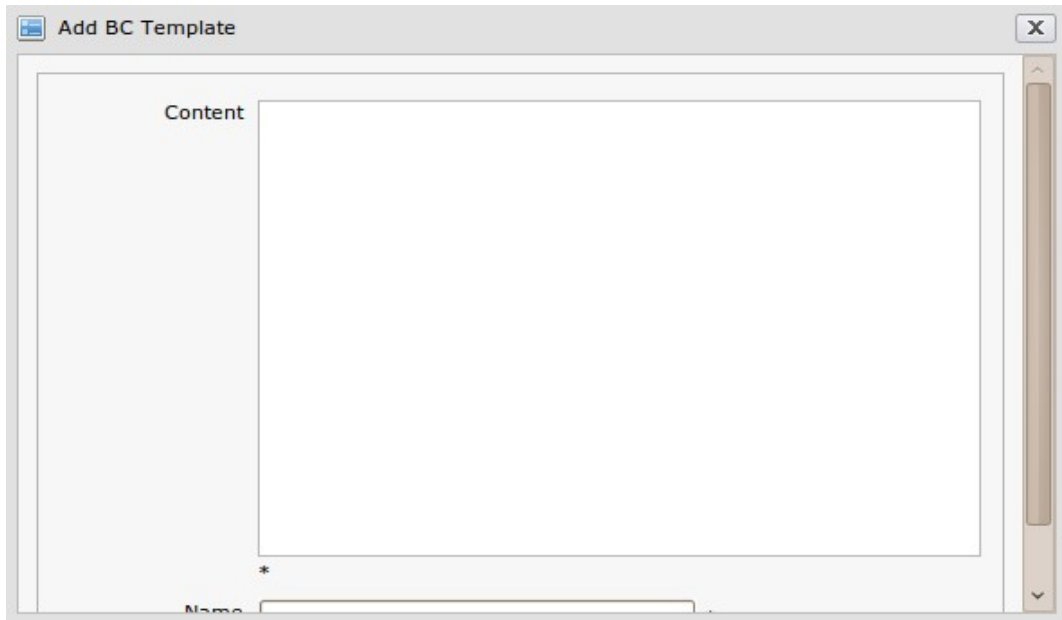


Illustration 158: Add BC Templates form

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 !, @, #, \$, %, &, *, (,).*

- **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.UIToolBar ;
import
org.exoplatform.ecm.webui.component.browsecontent.UIDocumentDetail ;
import
org.exoplatform.ecm.webui.component.browsecontent.UITagList ;
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 159: 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.

- **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.





5.3.2.4 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  

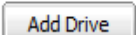


Illustration 160: Manage Drives

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.

▼ Drive ▶ Apply Views

Name *

Workspace system ▼

Home path

Workspace icon

Permissions *

Show referenced documents ☐

Show "non document" nodes ☐

Show sidebar ☐

Show hidden nodes ☐

Allowance to create folder exo:jsFolder
Unstructured folder
exo:webFolder
exo:linkFolder
exo:cssFolder
Folder

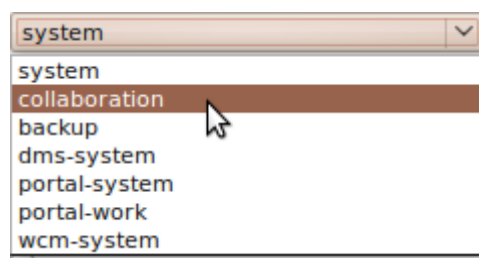
Allowance nodetype on left tree

Save Refresh Cancel

Illustration 161: 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 .

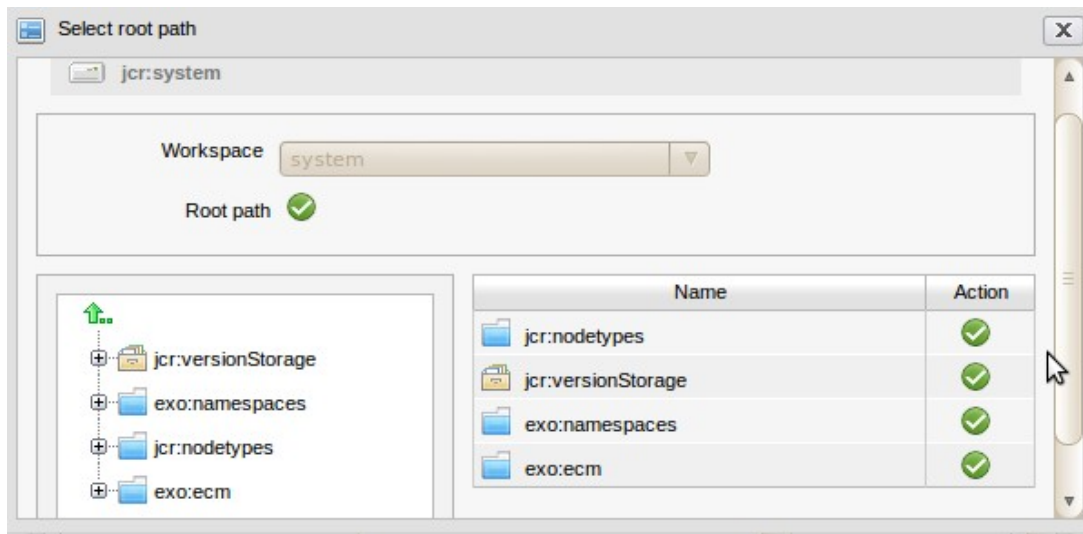



Illustration 162: The Select root path form

Step 5: Click the  icon to select the home path.

Step 6: Select an icon for the workspace by clicking the  icon .

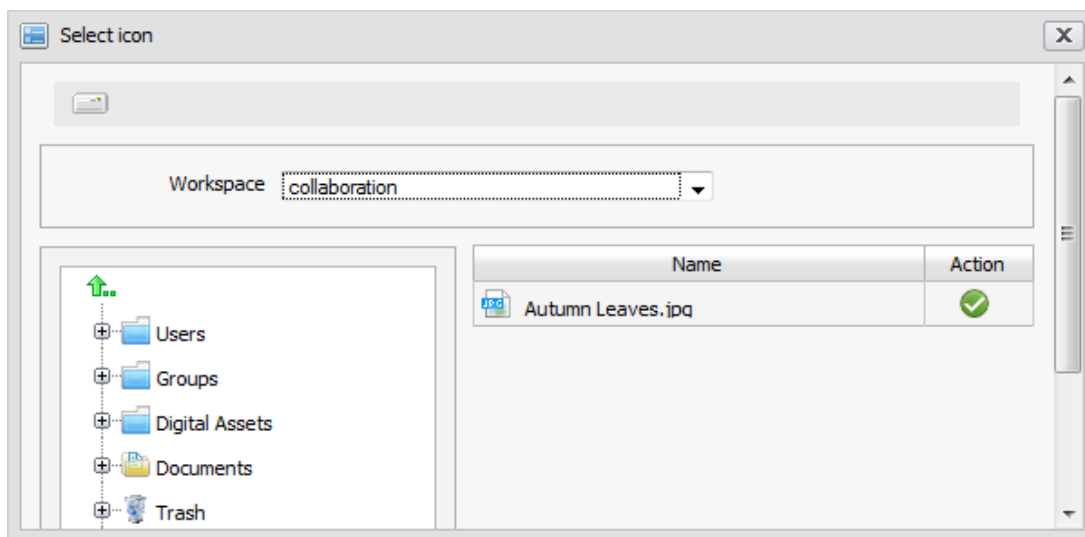

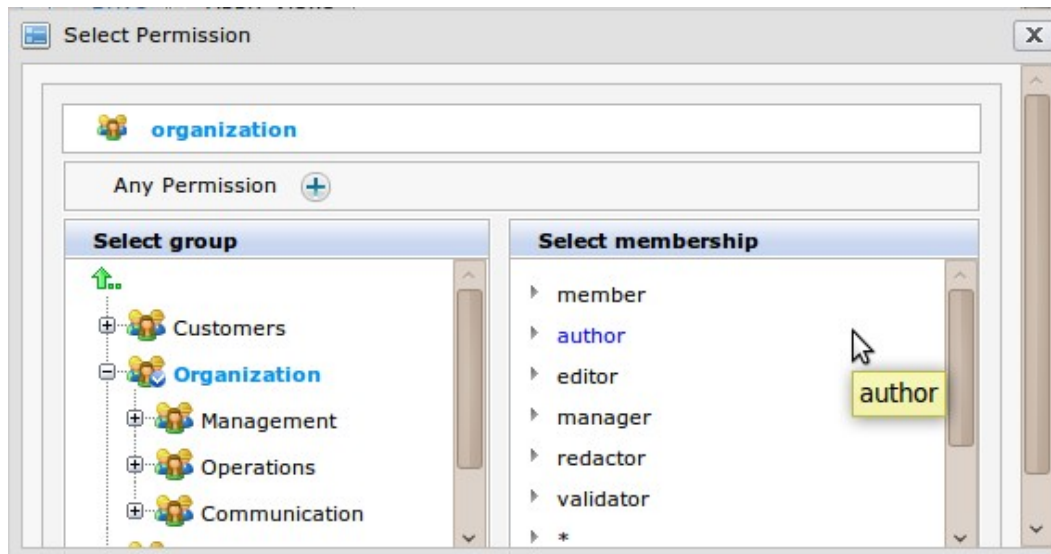


Illustration 163: The Select icon form

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.

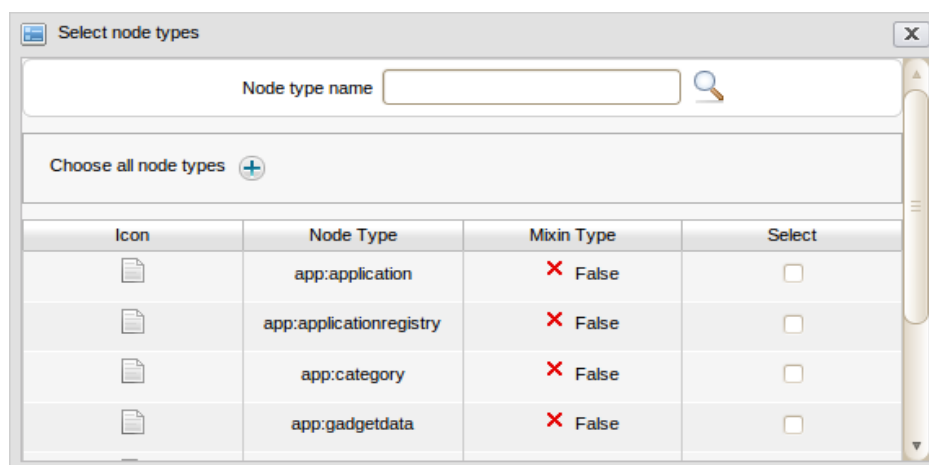
- Show referenced document: allows viewing preference documents.
- Show non-document: allows viewing non-documents.
- Show sidebar: allows showing the sidebar.
- Show hidden node: allows showing the hidden nodes.

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:



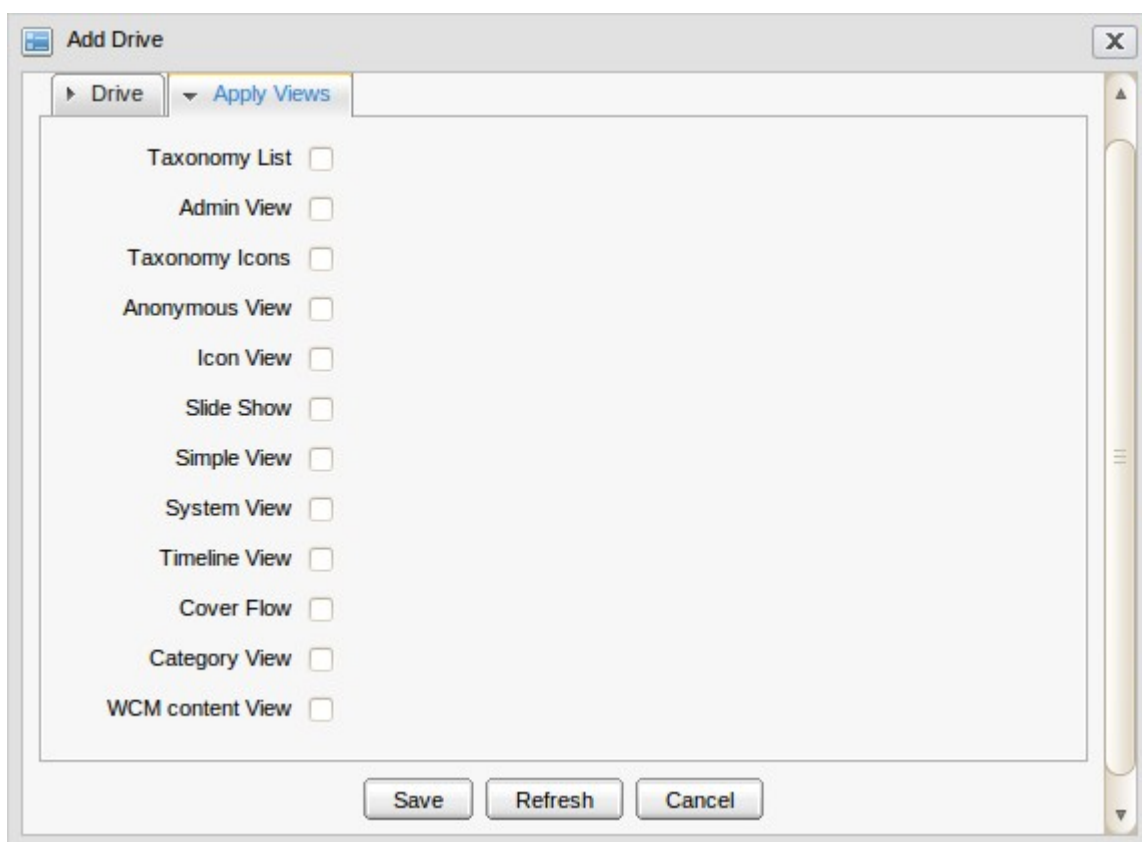
In this step, you can enter the name you need to search in the field '**Node type name**'. Then, click the magnifying glass icon to start searching. All the node types containing

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 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.

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:

Edit Drive

▼ Drive ▶ Apply Views

Name: .customers *

Workspace: collaboration ▼

Home path: /Groups/customers +

Workspace icon: +

Permissions: */customers * +

Show referenced documents: ☐

Show "non document" nodes: ☒

Show sidebar: ☒

Show hidden nodes: ☒

Allowance to create folder: exo:jsFolder, Unstructured folder, exo:webFolder, exo:linkFolder

Step 2: Edit the properties of the current drive.


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



You cannot edit the drive name.

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.

5.3.3 Types of Content

5.3.3.1 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**.


 **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 > >>

Illustration 164: Namespace Registry

Step 1: Click the **Register** button in the **Namespace Registry** form to register a new namespace:

 **Register new Namespace** X

Namespace Prefix *

Uri *

Illustration 165: 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 !, @, #, \$, %, &, *, (,).*

5.3.3.2 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
<< < 1 2 3 4 5 6 > >>

Illustration 166: The Manage Node Type form

5.3.3.3 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:

View Node Type Information

▼ Node type

Name space: app

Node type name: application

Is mixin type: false

Orderable child nodes: false

Primary item name:

Super types: gtn:protectedresource, mix:referenceable

Property definitions: [jcr:primaryType], [app:creationdate], [app:lastmodificationdate], [gtn:edit-permissions], [gtn:description]

Illustration 167: The View Node Type Information form

Step 2: Click **Close** to exit this form.

Add node type

Do as follows:

Step 1: Open the **Add/Edit Node Type Definitions** form by clicking the **Add** button:

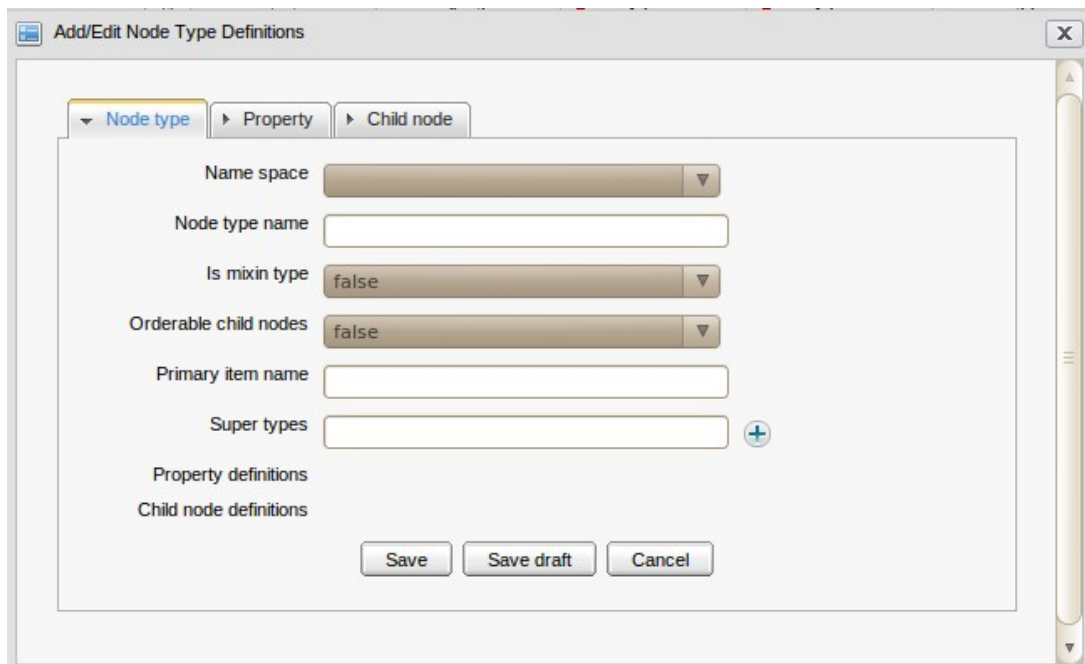


Illustration 168: The Add/Edit Node Type Definitions form

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.

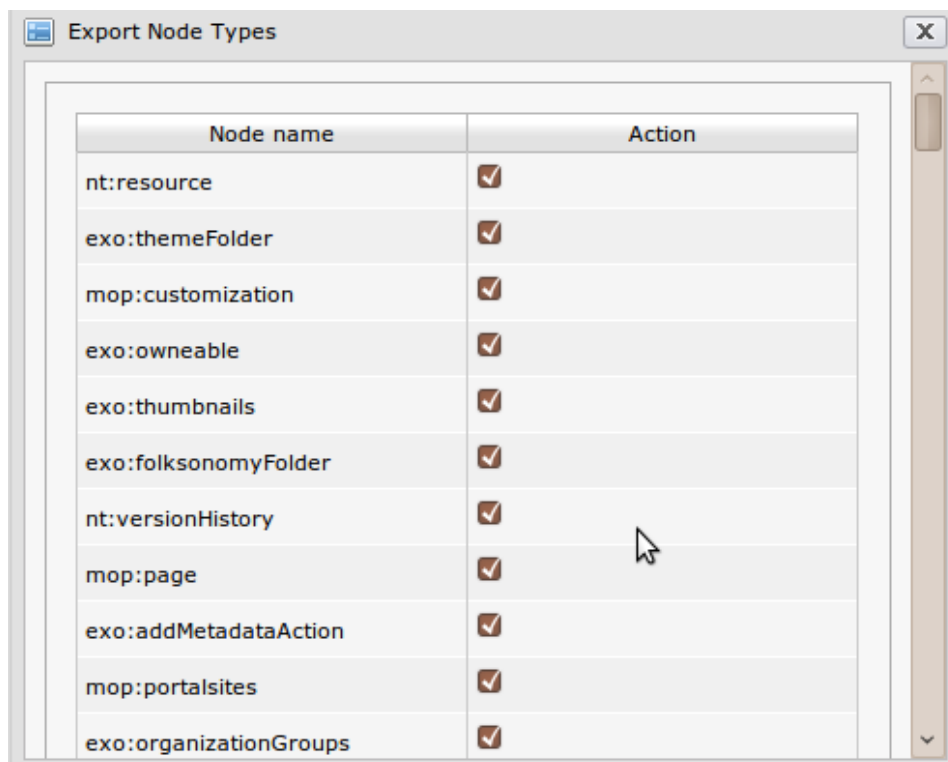
Step 9: Child node definitions: list all definition names of **Child node** tab.

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.

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 169: 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.



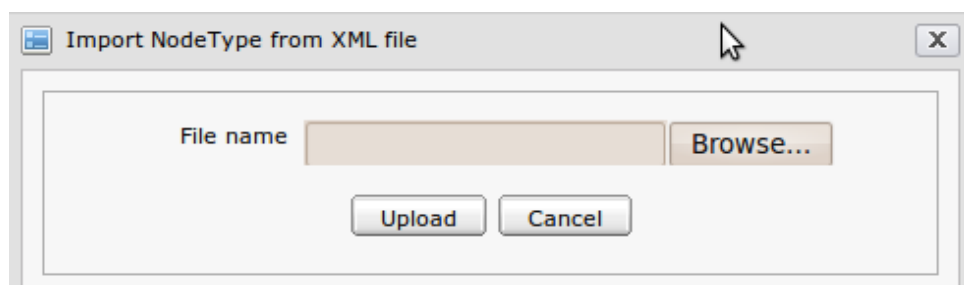
You must select at least 1 node type to be exported.

*If you do not want to export the node, click **Cancel** to quit this pop up.*

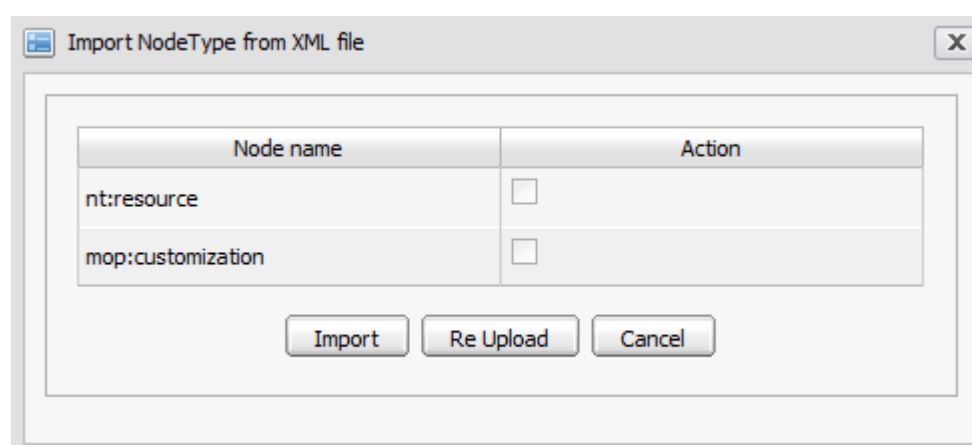
Import node types

Do as follows:

Step 1: Show the **Import Node Type from XML file** form by clicking the **Import** button:




Step 2: Browse a file to upload a file.



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.

5.3.4 Advanced Configuration

5.3.4.1 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**

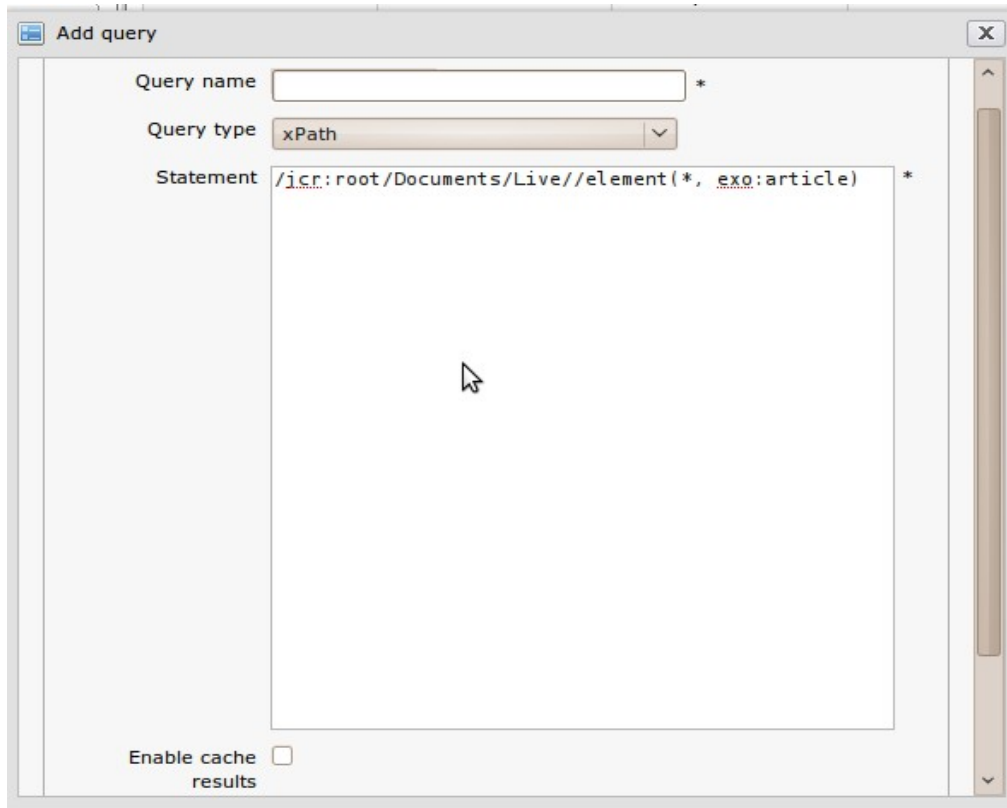
| Name | Type | Statement | Permissions | Actions |
|------------------------|-------|---|-------------------|---------|
| All Articles | xpath | //element(*,exo:article) order by @exo:dateCreated descending | *:/platform/users | |
| Created Documents | xpath | //*[(@jcr:primaryType = 'exo:article' or @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 | |

Illustration 170: Manage Queries

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 window titled "Add query". It has three main input areas: "Query name" with an asterisk indicating it's required, "Query type" with a dropdown menu currently showing "XPath", and "Statement" with a text area containing the XPath expression `/jcr:root/Documents/Live//element(*, exo:article)` followed by an asterisk. At the bottom left, there is a checkbox labeled "Enable cache results" which is currently unchecked. A mouse cursor is visible over the "Statement" text area.

Illustration 171: 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.

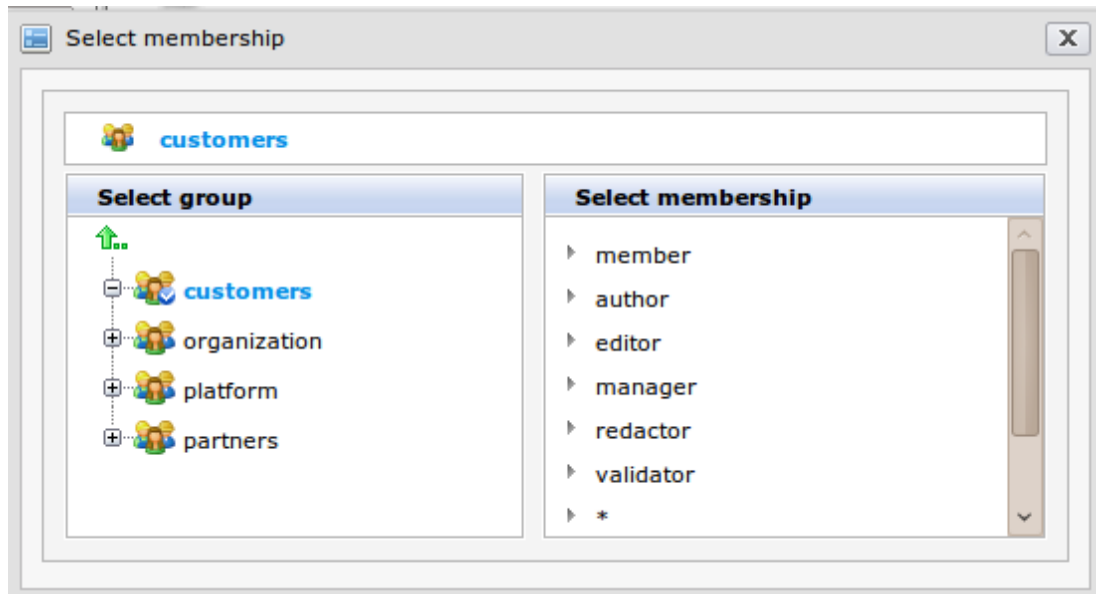
Step 4: Enter the statement for query. The name of node type must be unique.

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.

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:



Edit query

Query name: All Articles *

Query type: XPath

Statement: `//element(*,exo:article) order by @exo:dateCreated descending` *

Enable cache results ☒

Illustration 172: 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.

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.

5.3.4.2 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.! | | |
| 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 | | |

Total pages: 2 << < 1 2 > >>

Add

Illustration 173: 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:

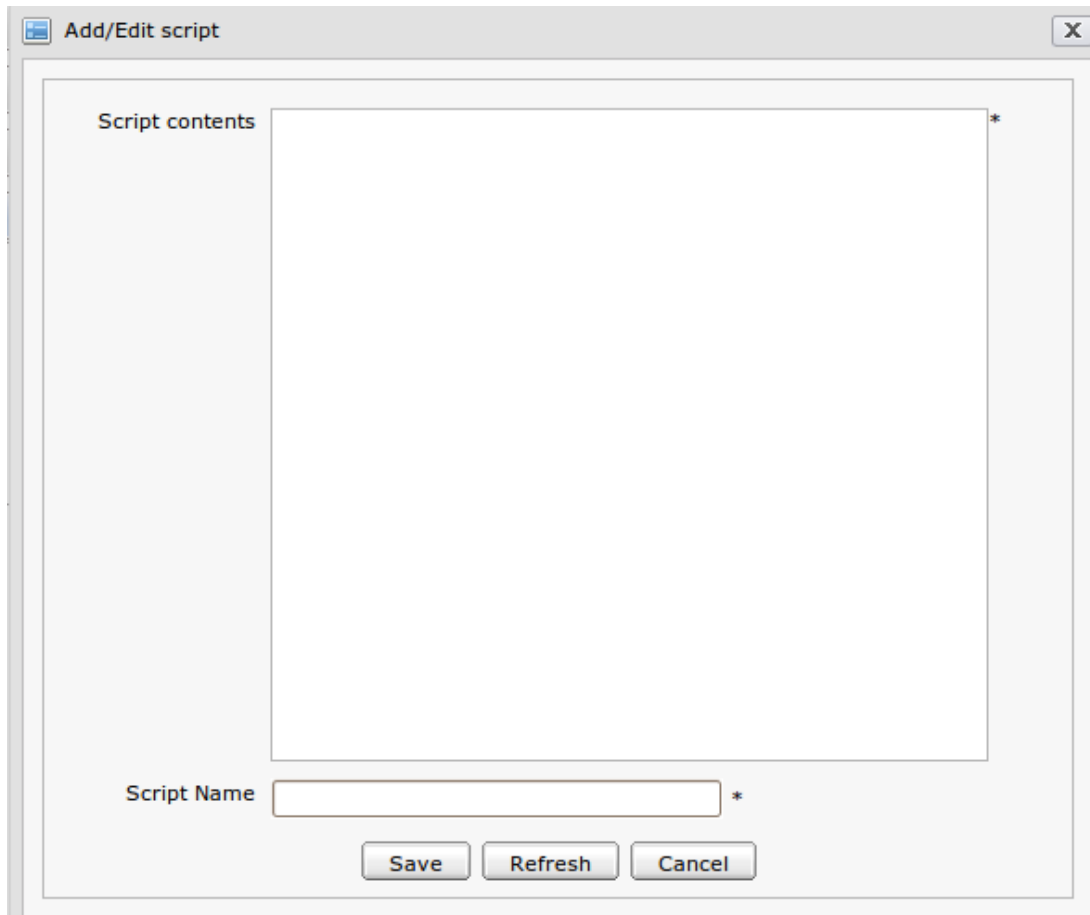


Illustration 174: The Add/Edit script form

(*):required


Step 3: Enter a value for the **Script content** field.

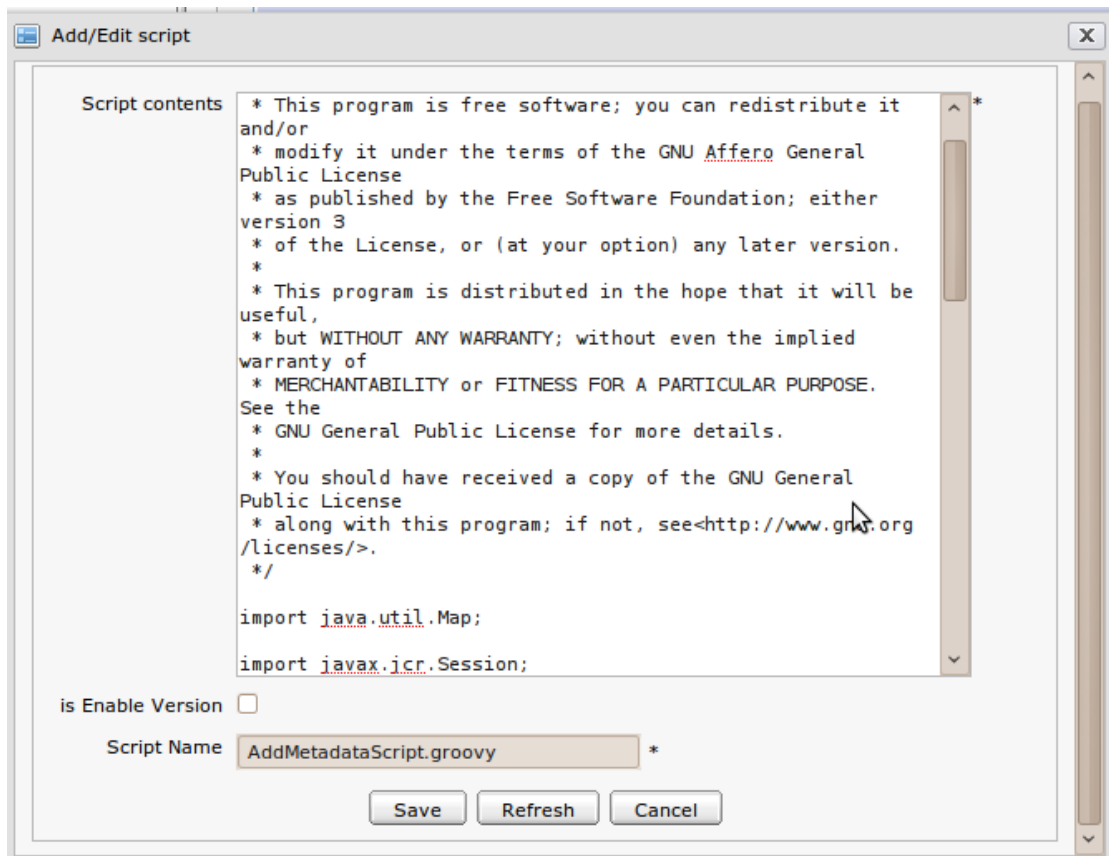
Step 4: Enter a script name for the **Script Name** field.

- 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:

 **Manage Scripts**


► ECM Scripts ▼ BC Scripts

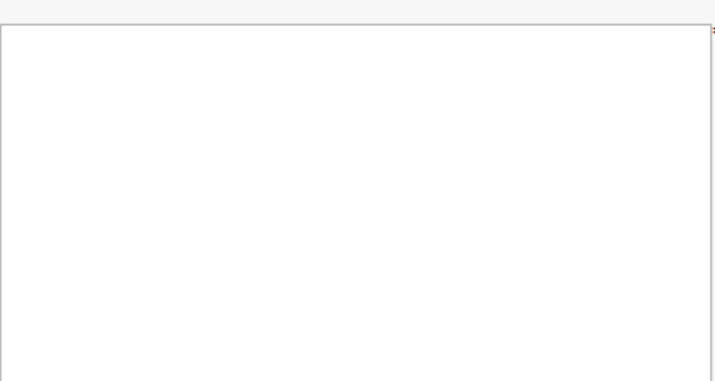
| Name | Path | Base Version | Actions |
|---------------------|-----------------------------------|--------------|---|
| GetDocuments.groovy | ...nt-browser/GetDocuments.groovy | |   |

- ✓ 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:

 **Add/Edit script** ✕

Script contents 

Script Name *

(*): required

Step 3: Input script content for the **Script content** field.

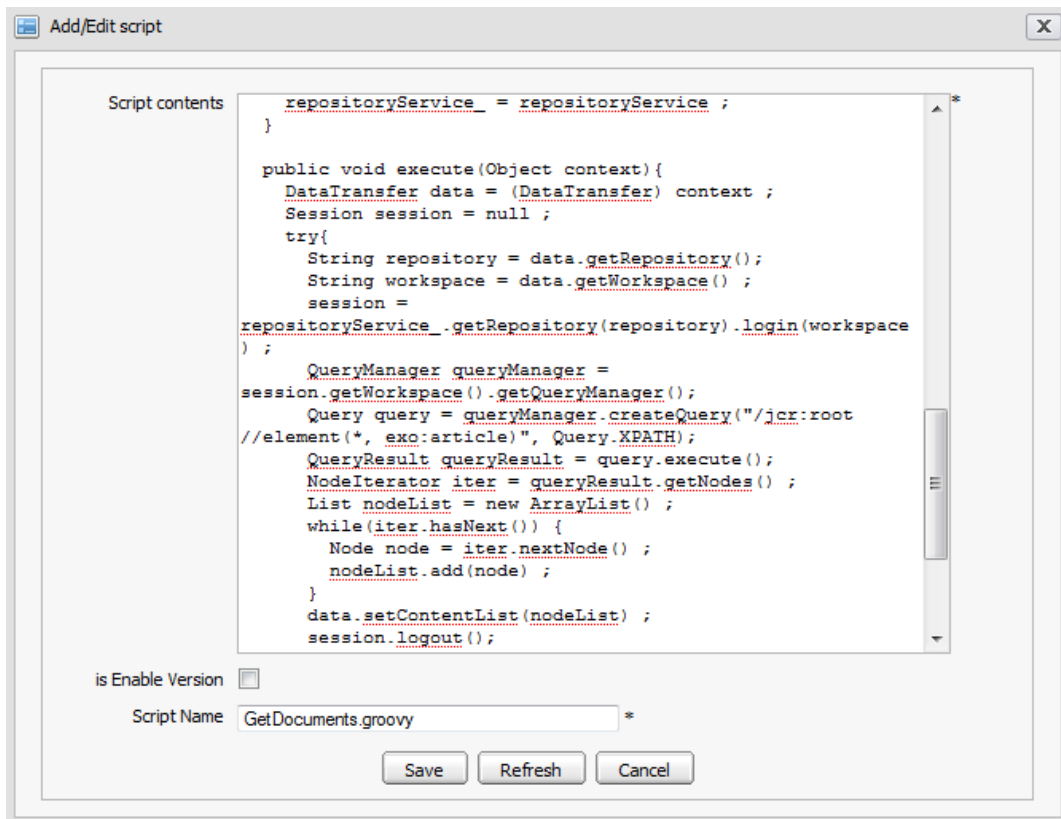
Step 4: Input a script name for the **Name** field.

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.

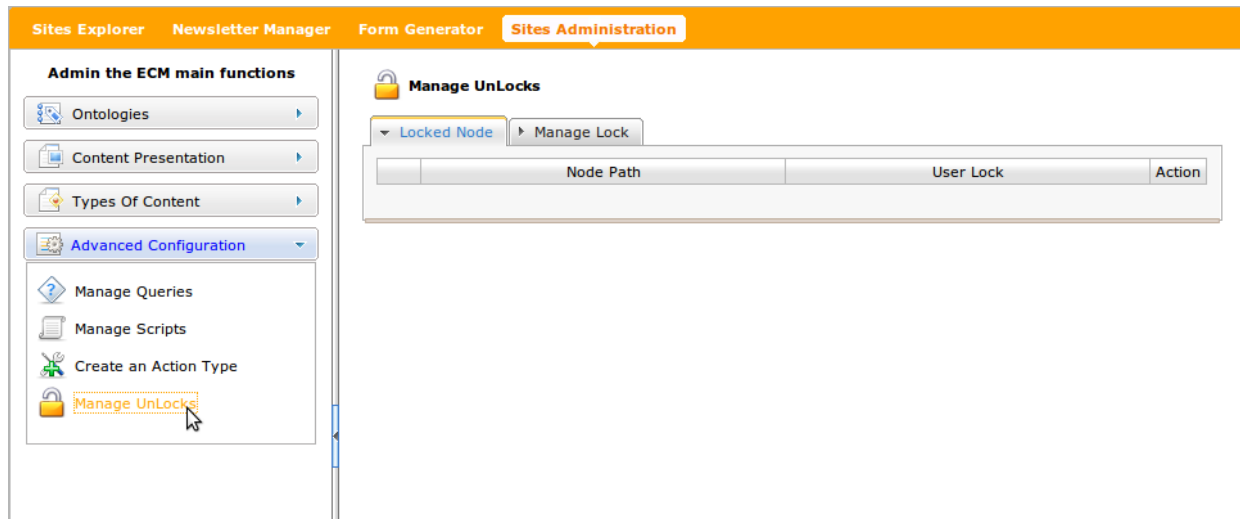
Step 2: Click **OK** to accept deleting this script, or **Cancel** to discard this action.


5.3.4.3 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.

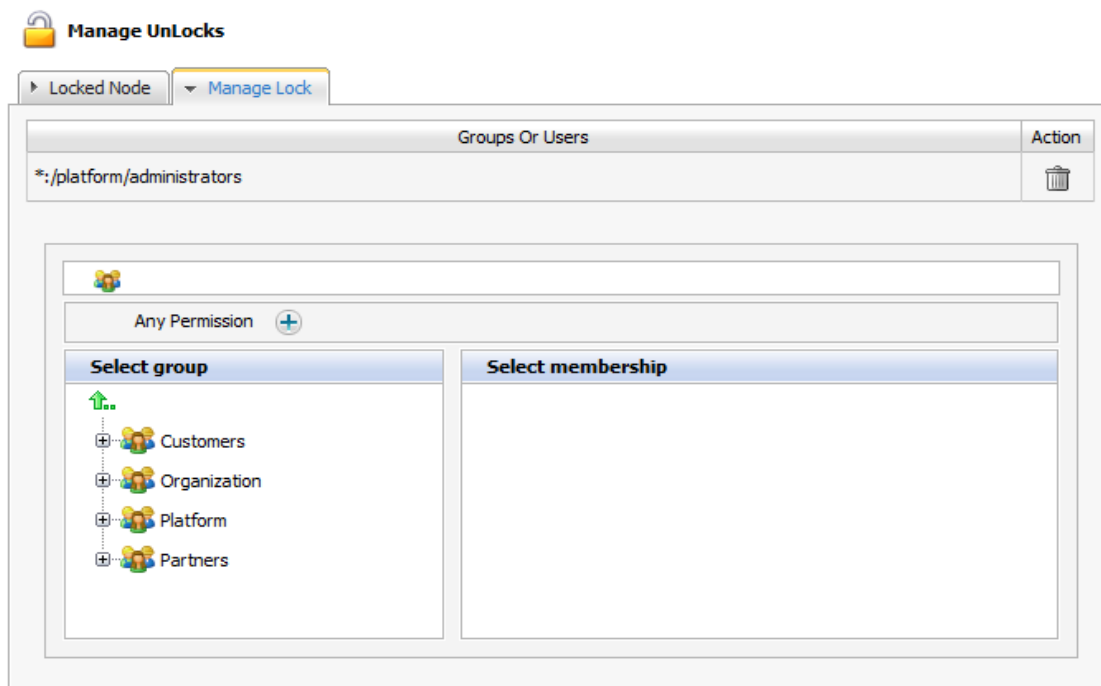
Step 2: Select **Advanced Configuration | Manage Unlocks** on the **Admin the WCM** main functions panel on the left. The locked nodes will be listed on the right panel.




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**.

5.3.4.4 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 175: 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 176: The Action Type Form form

Step 4: Select the action type.

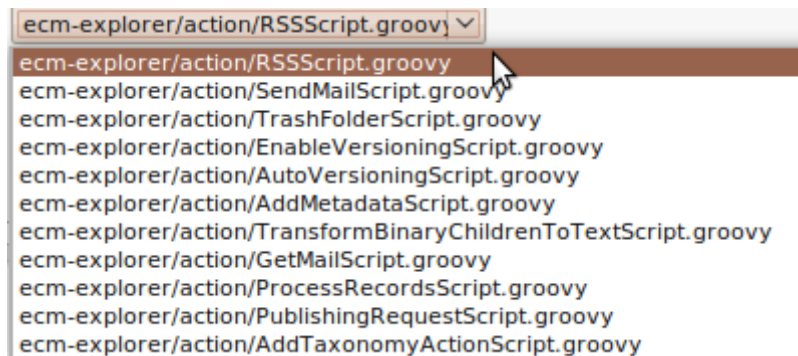
Step 5: Input a name for the action.





- 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.

6 Next Steps

This user guide 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](#)