



# eXo Content Manual

Version 3.0

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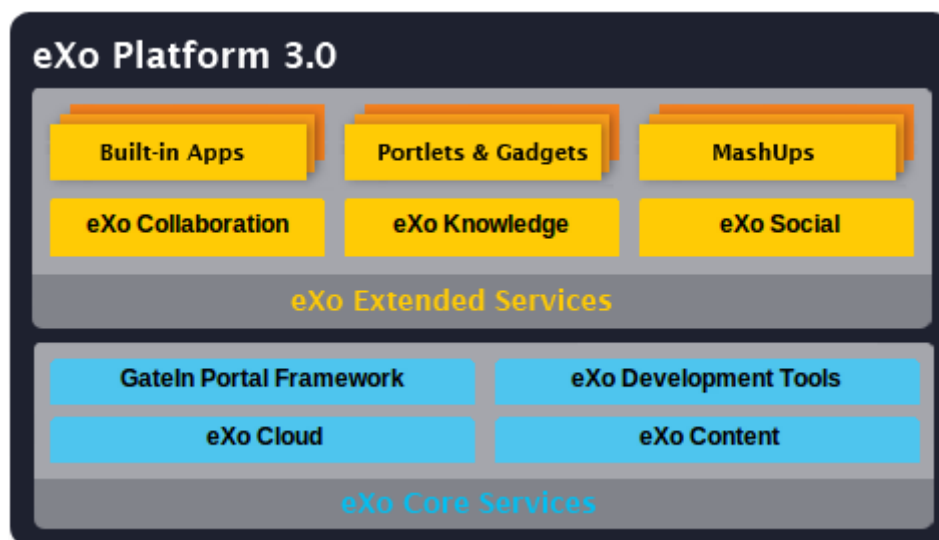
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# 1 Preface

## 1.1 Overview

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

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



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

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

## 1.2 Why use eXo Content

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

### Website Creation

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

### Web content organization

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

### Capture & Manage Documents

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



or to invoke any "coded" action required

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

### Store & Access Documents

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

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

## 1.3 About this document

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

By reading this manual, you will :

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

## 1.4 References & related resources

### Information

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

### Support

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

## Download

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

## Resource Center

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

## 2 Overall Introduction

### 2.1 eXo WCM & DMS

**eXo Web Content Management (eXo 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.

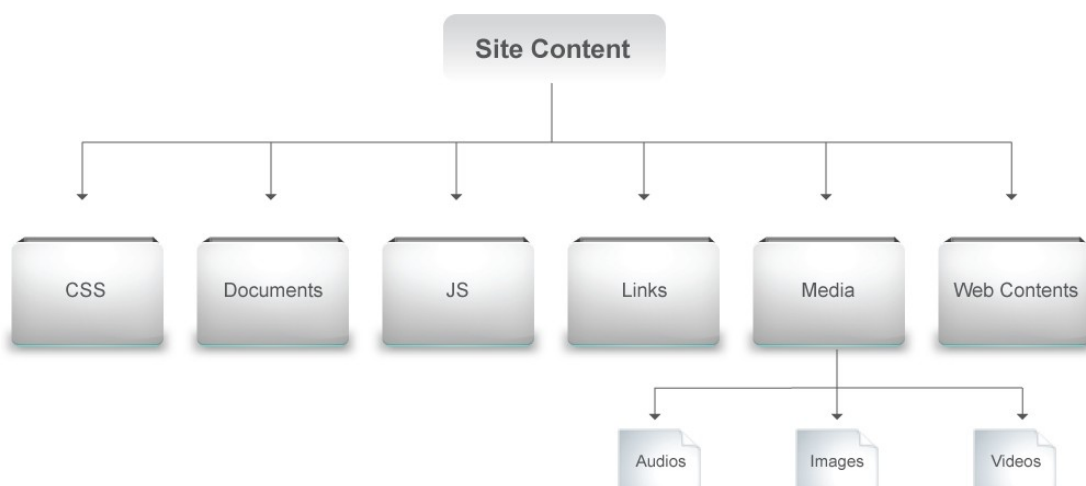
**eXo WCM** users can manage both structured and unstructured content, so that an organization, such as a business or governmental agency, can more effectively meet business goals (increase the profits or improve the organizational process efficient use of budgets), serve its customers (as a competitive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

**eXo WCM** improve 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. **eXo 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 following:



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

Details:

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

## 2.3 Web Content

### 2.3.1. What is Web Content in eXo WCM?

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

### 2.3.2. Web Content Structure

As you know, a Web content may include various elements. Thus, to create and manage Web content more effective and dynamic, 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, etc.
- **default.js:** It contains JS data which is used to make web content more animating and dynamic.



## 2.4 Terminologies

### 2.4.1 Repository

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

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

### 2.4.2 Workspace

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

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

### 2.4.3 Drive

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

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

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

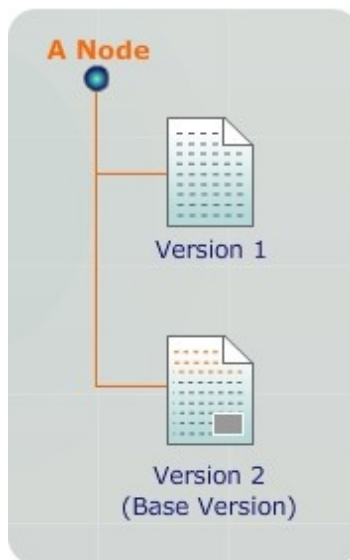
## 2.4.4 Node

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

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

## 2.4.5 Version

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



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

## 2.4.6 WebDAV

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

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

## 2.4.7 Podcast

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

## 2.4.8 File Plan

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

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

## 2.4.9 Symlink

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



Documents.lnk

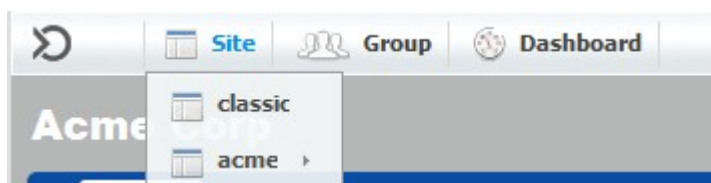
## 3 How to use eXo WCM & DMS?

### 3.1 Basic actions in eXo WCM

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

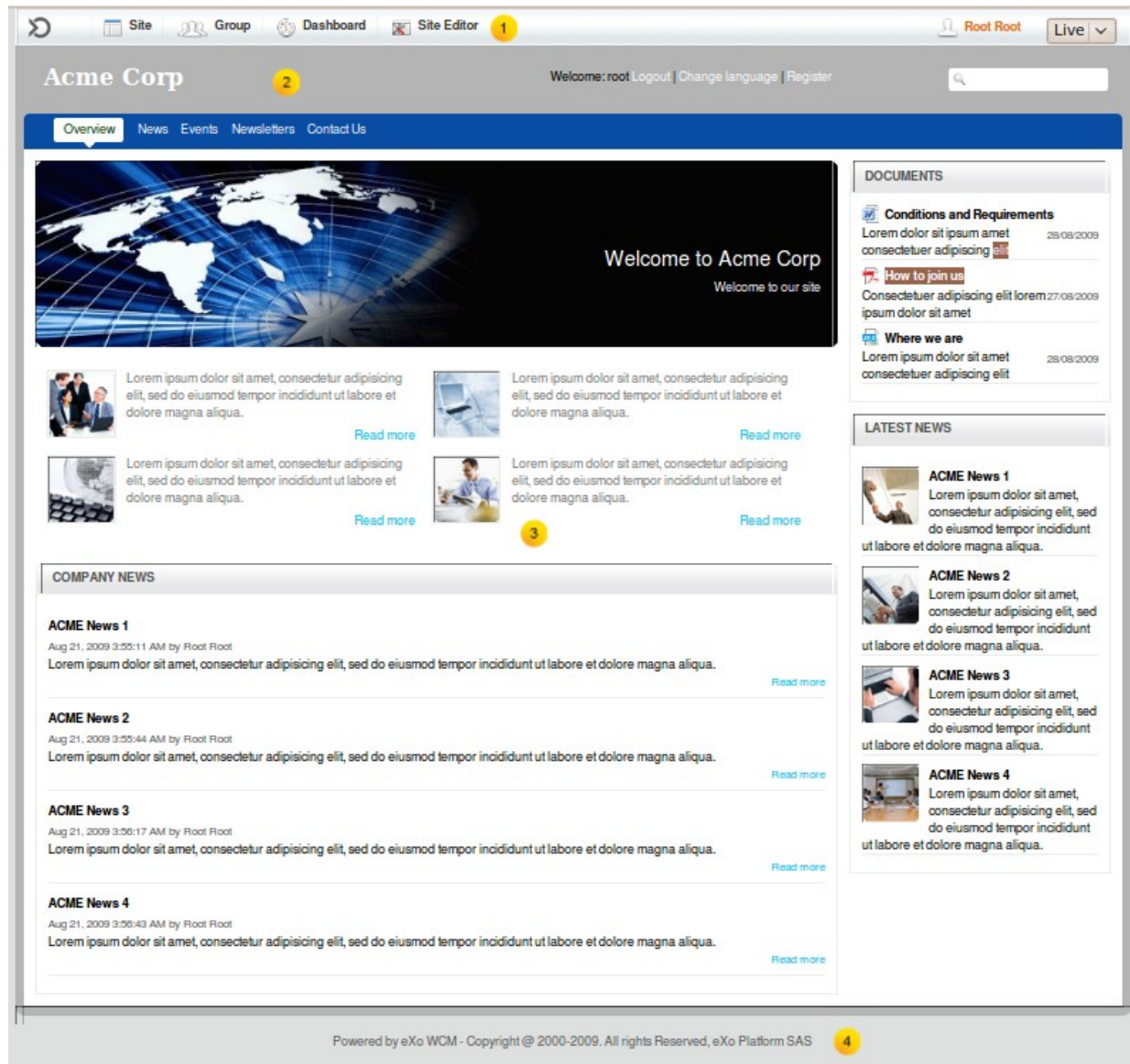
#### 3.1.1 Viewing a site

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



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





**Illustration 1: The Interface of the Acme site**

Detail:

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

### 3.1.2 Register an account

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

**Step 1:** Go to the portal by inputting the URL in the address bar (e.g:

*http://localhost:8080/portal/public/classic*). The anonymous homepage will appear:

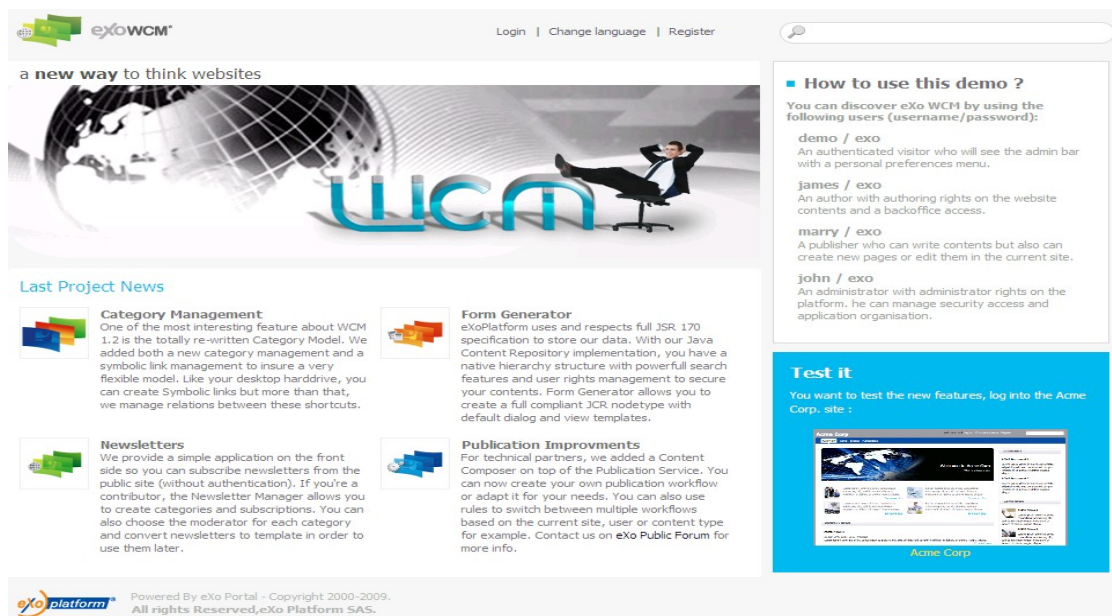
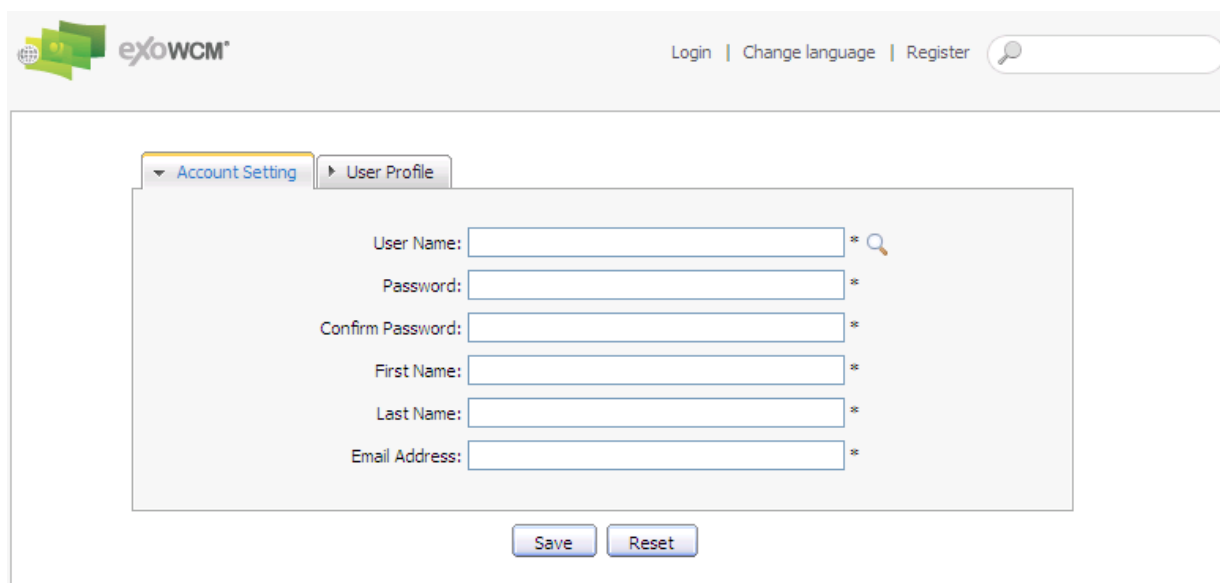


Illustration 2: The eXo WCM in the public mode

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




The screenshot shows the eXo WCM user registration interface. At the top, there is a header with the eXo logo, 'exowcm', and links for 'Login', 'Change language', and 'Register'. Below the header, there are two tabs: 'Account Setting' (selected) and 'User Profile'. The 'Account Setting' tab contains a form with the following fields: 'User Name' (with a search icon), 'Password', 'Confirm Password', 'First Name', 'Last Name', and 'Email Address'. Each field has an asterisk (\*) indicating it is required. At the bottom of the form, there are 'Save' and 'Reset' buttons.

(\*) required

The **Account Setting** information includes:

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

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

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

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

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

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

- **User name** is existing or **User Name** is invalid.
- **Password** has less than 6 characters.
- **Password** and **Confirm Password** are not the same.
- **Email Address** is invalid format.
- Required fields are empty.

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



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



### 3.1.3 Sign in

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

Do as follows:

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

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

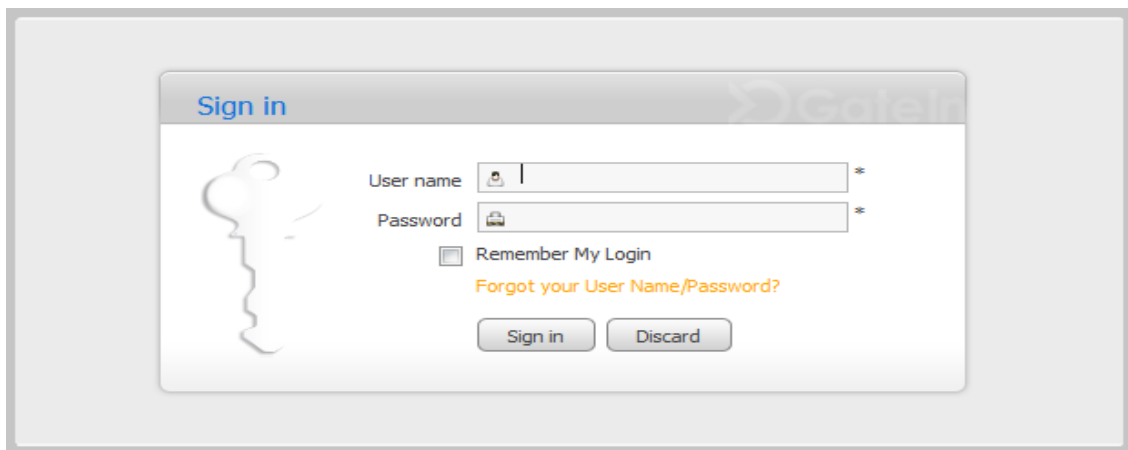


Illustration 3: The Sign in form

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

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

Details:

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

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

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

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

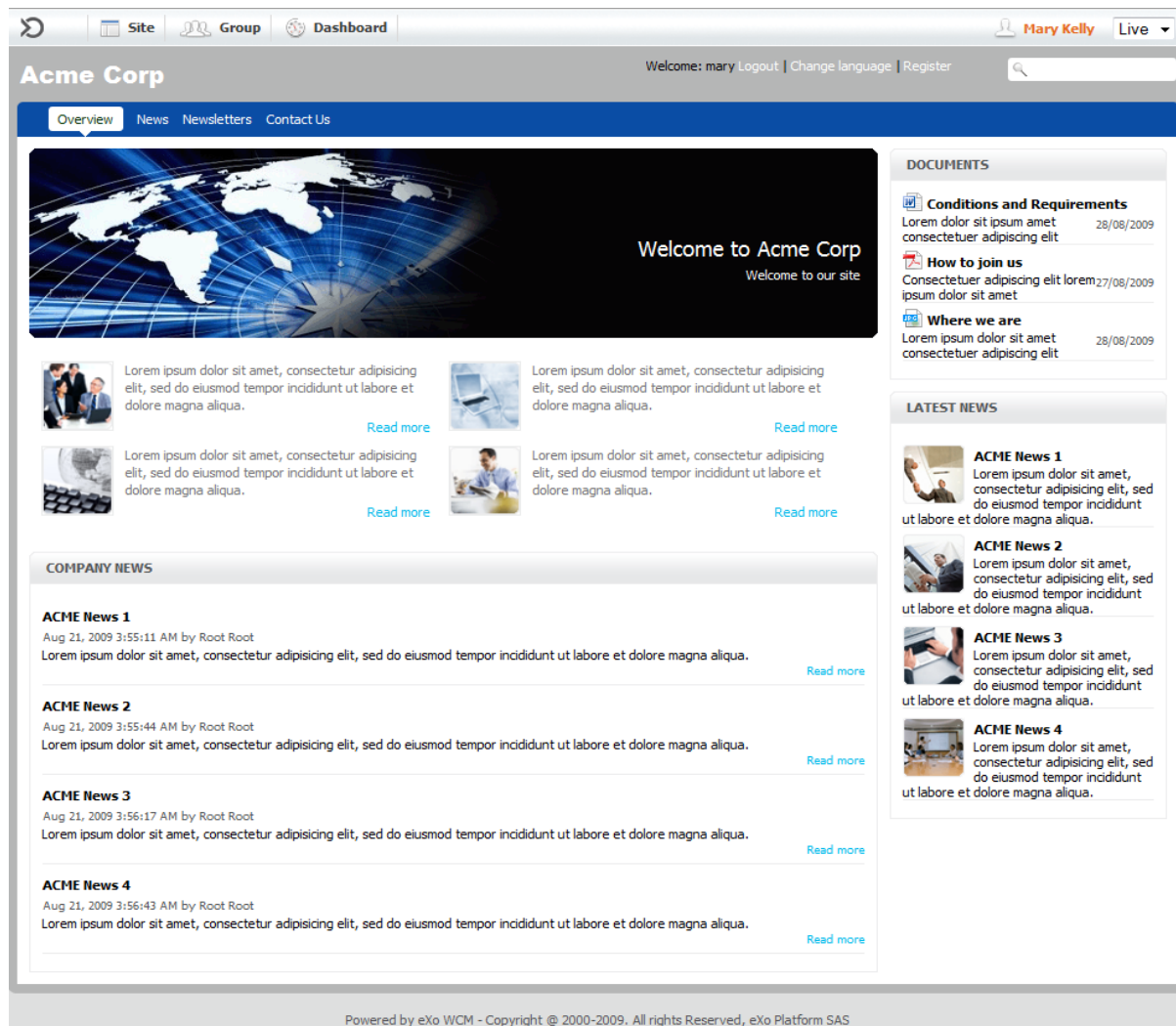


Illustration 4: The main screen of the eXo WCM in authenticated mode

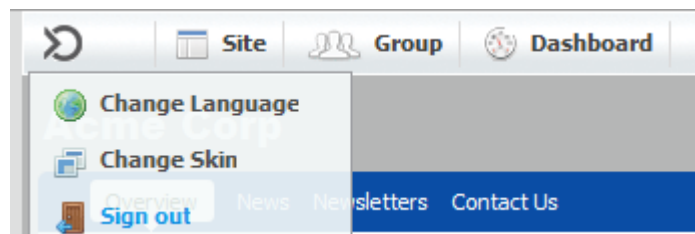
### 3.1.4 Sign out

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

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



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



### 3.1.5 Retrieve username/password

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

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

This form offers two options:

**Why are you are not able to login ?**

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

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

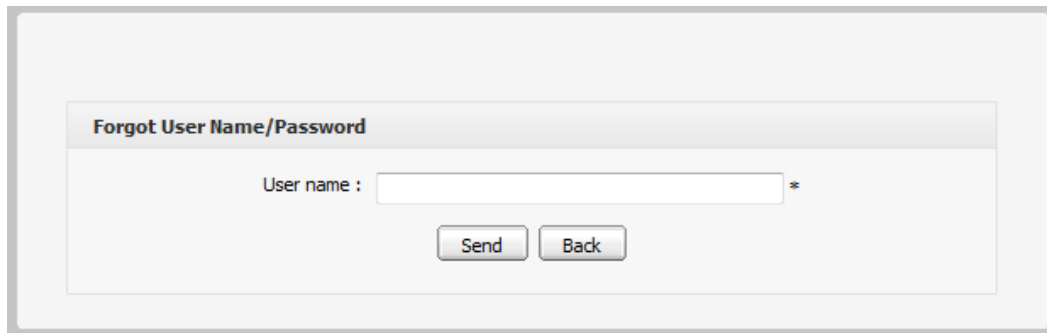
☒ Forgot my password  
☐ Forgot my username

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

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

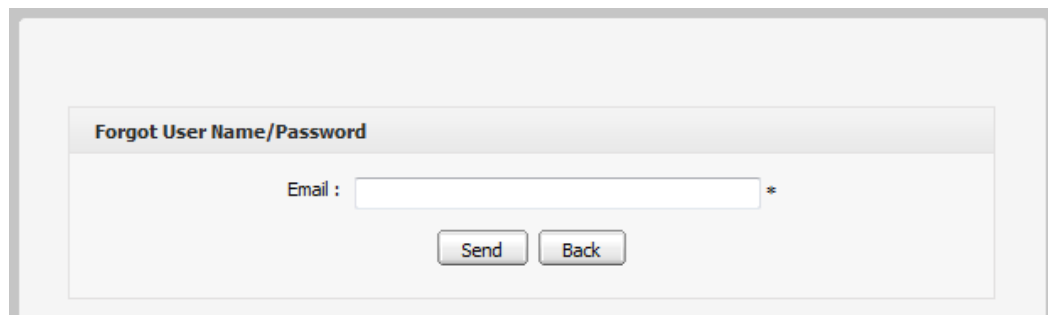
**Step 2:** Select one of these two options in this form. The selected option will be shown:

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



The screenshot shows a web form titled "Forgot User Name/Password". Inside the form, there is a label "User name :" followed by a text input field. 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 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 the **Send** button to send the inputted values.

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

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



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

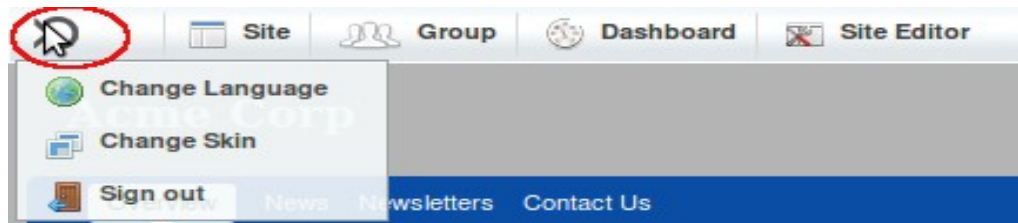


### 3.1.6 Change the displaying language

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


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

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



The **Interface Language Setting** form appears:

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

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

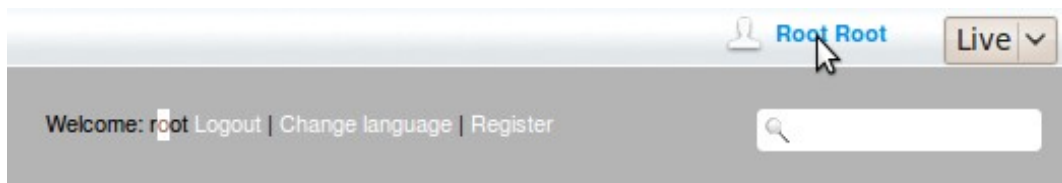
**Step 3:** Click the **Apply** button to change the displaying language temporarily and wait few seconds to take effect or click **Cancel** button to quit without any changes.

### 3.1.7 Change the account information

The function allows changing your account information.

Do as follows:

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



The Account Profiles tab will appear:

A screenshot of the 'Account Profiles' tab in the eXo interface. The tab is active, showing a form with the following fields: 'User Name' (containing 'root'), 'First Name' (containing 'Root'), 'Last Name' (containing 'Root'), and 'Email' (containing 'root@localhost'). Each field has a small circular icon to its right. Below the fields are 'Save' and 'Reset' buttons. At the bottom of the form is a 'Close' button. The 'Change Password' tab is also visible but inactive.

Illustration 5: The Account Profiles tab

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

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

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

**Step 2:** Change your **First Name**, **Last Name**, **Email**. You can not your **User Name**.

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

- ✓ To change your Password, do as follows:

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

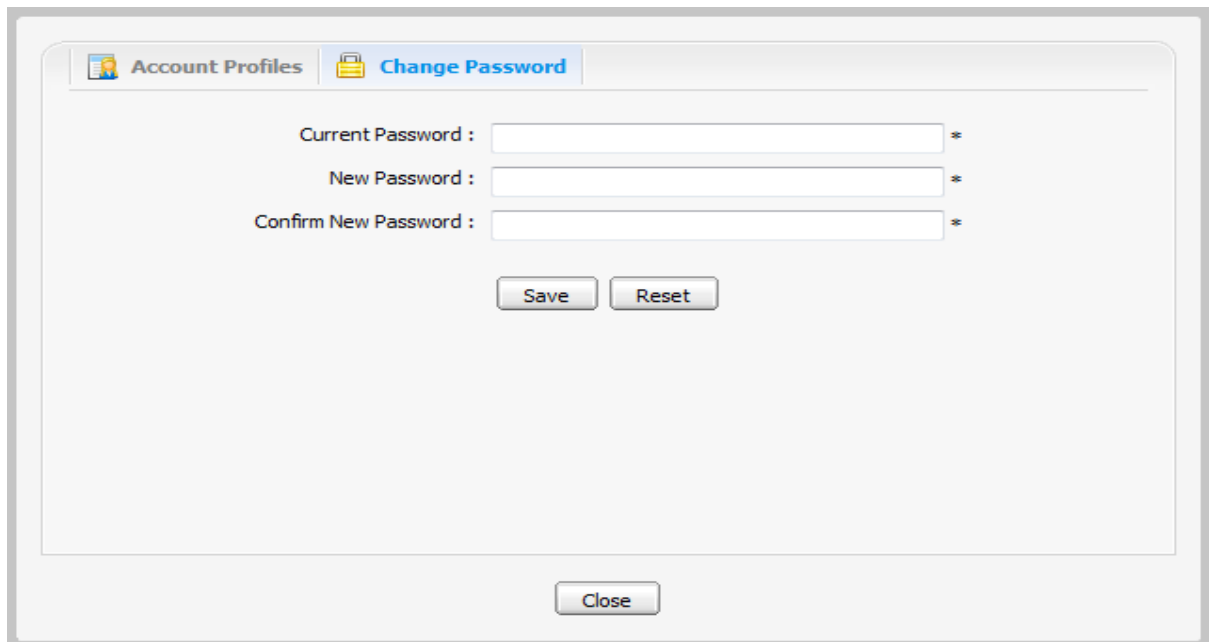


Illustration 6: The Password Changing form

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

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

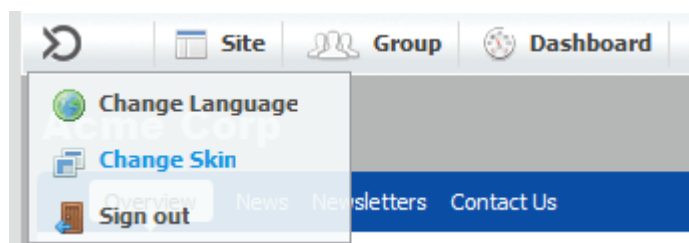
**Step 4:** Input your password again in the **Confirm New Password** field.

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

### 3.1.8 Change the skin of the current site

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

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



The **Skin Setting** form appears:

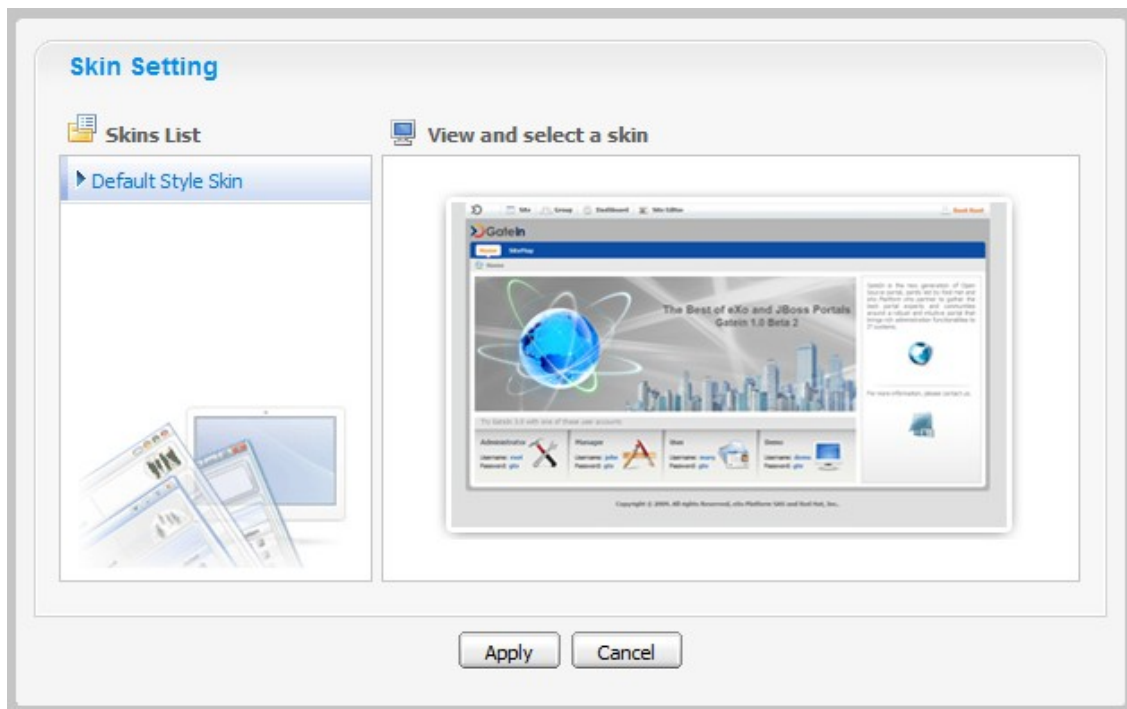


Illustration 7: The Skin Setting form

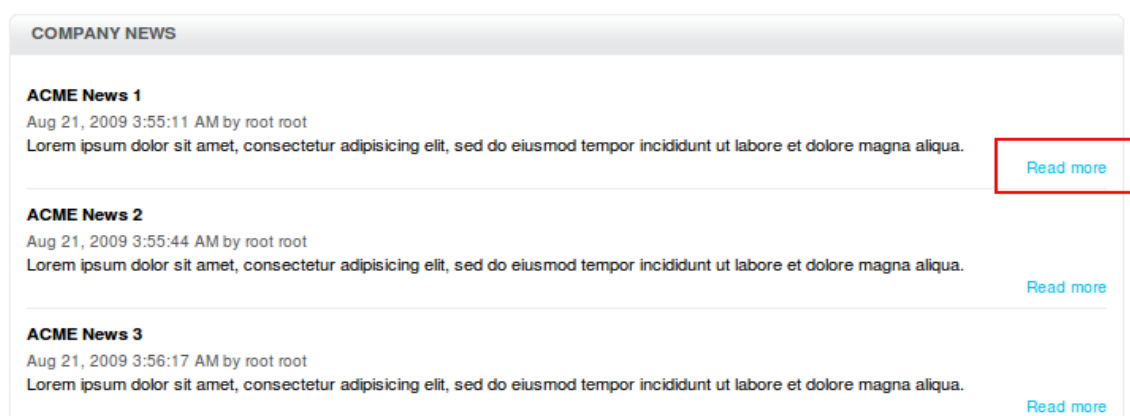
**Step 2:** Select the skin you want by clicking its name.

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

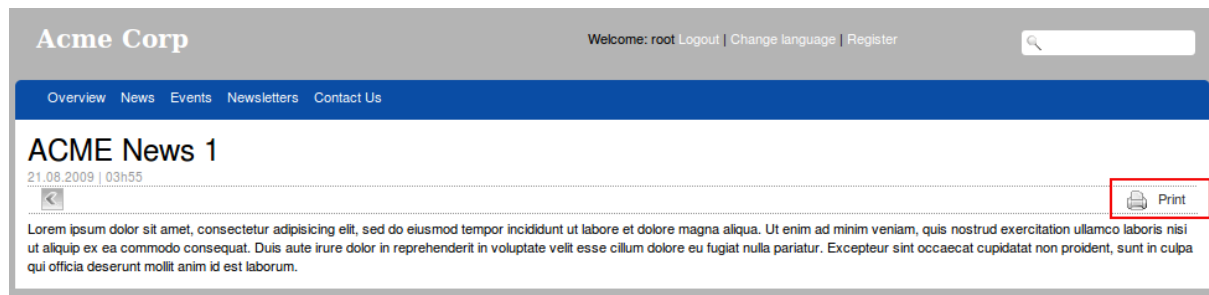
### 3.1.9 Print a web content

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

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



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



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

## 3.2 Set up a website

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

### 3.2.1 Create a new site

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

Do the as follows:

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

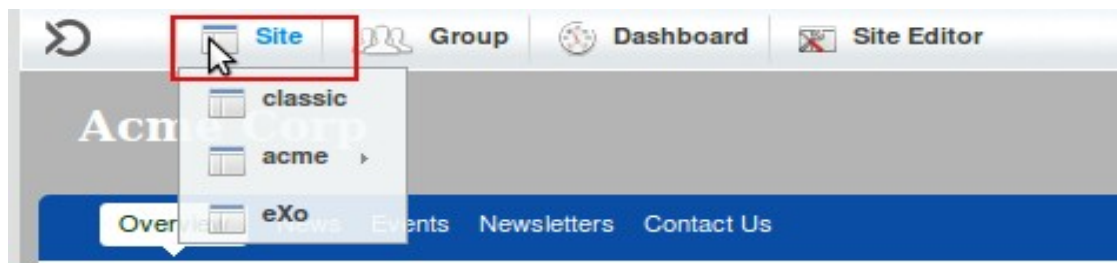


Illustration 8: The administration bar

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

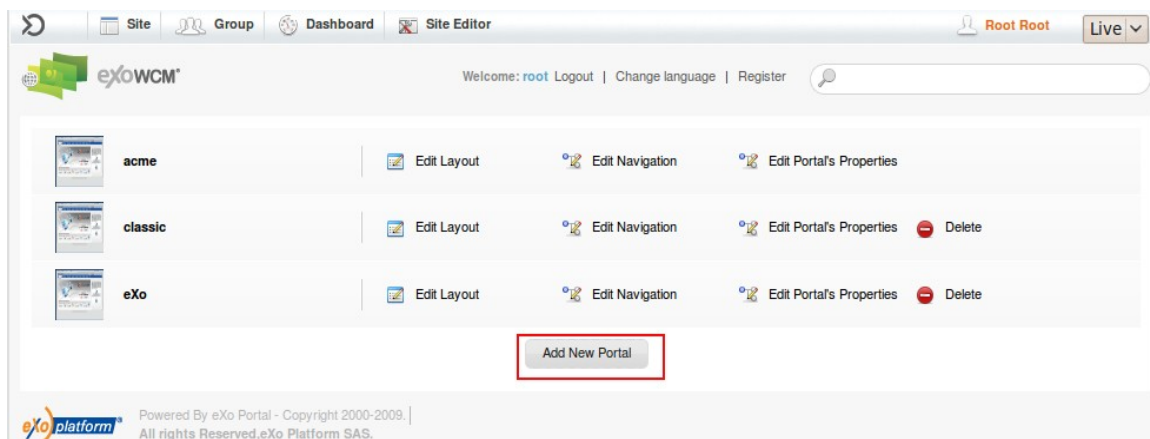


Illustration 9: The list of the current portals

The add new portal form appears:

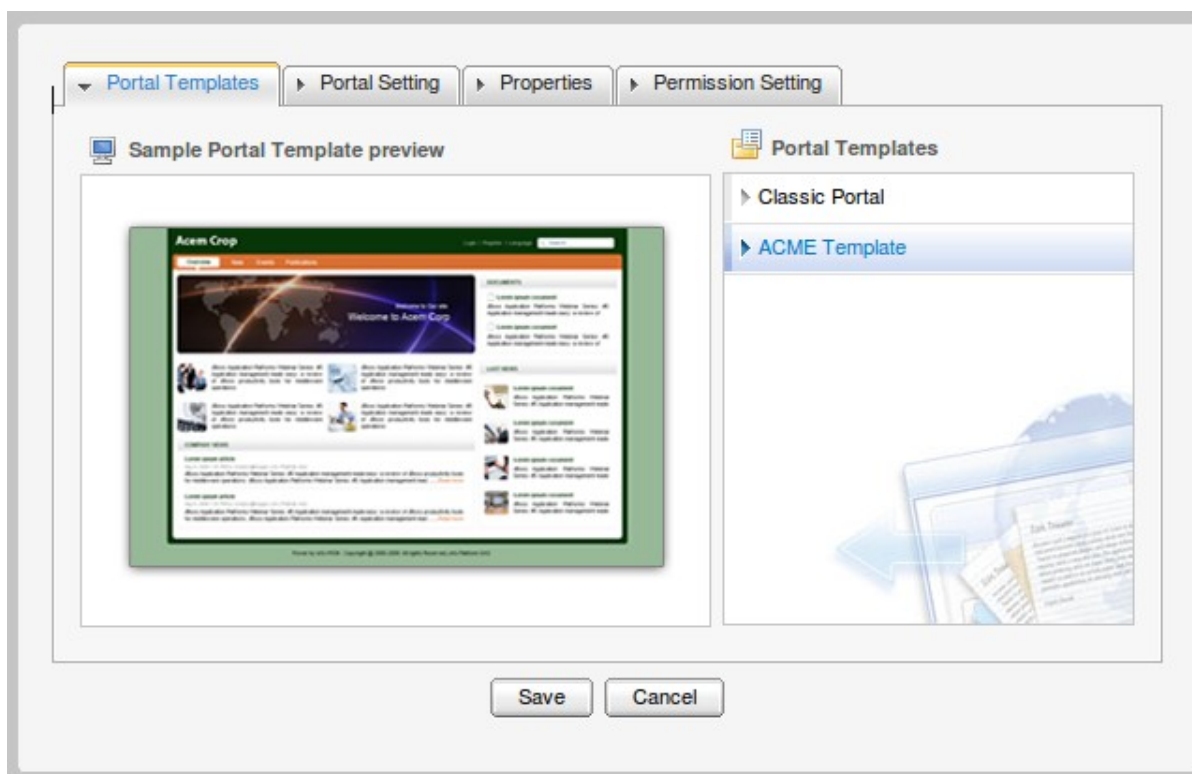
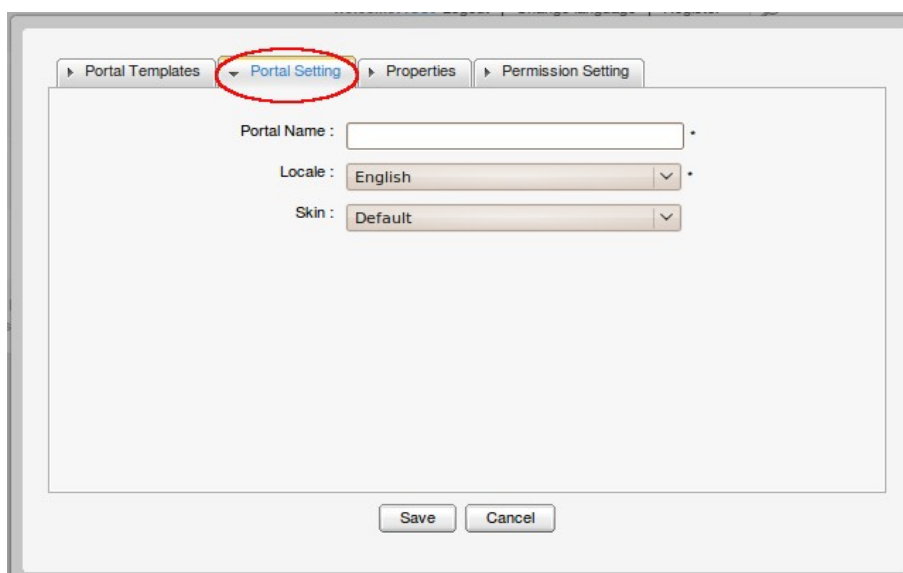


Illustration 10: The Add new Portal form

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

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





Details:

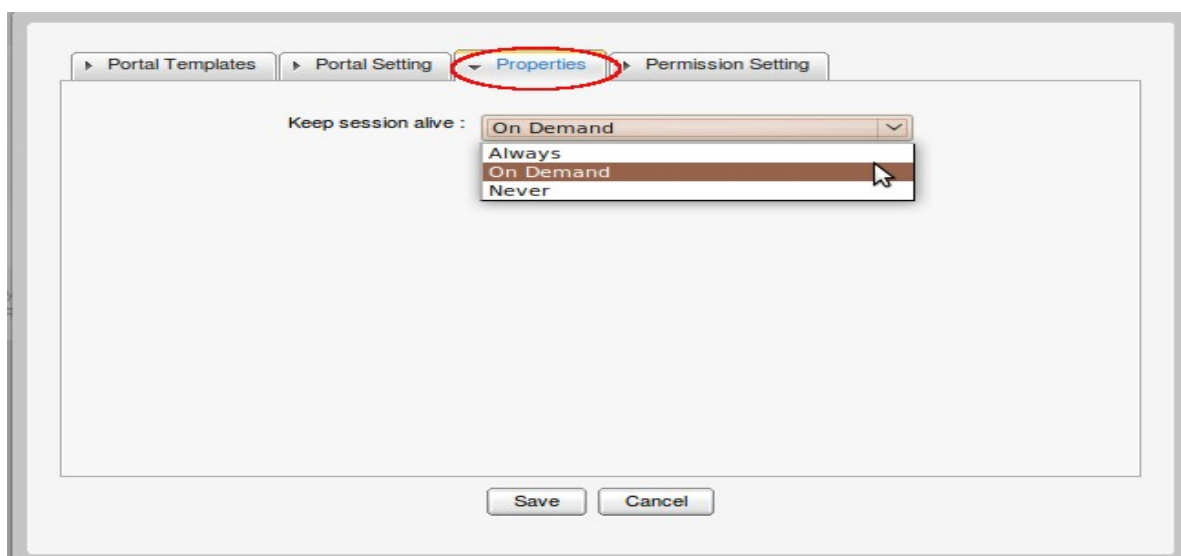
(\*): required

|                    |  |
|--------------------|--|
| <b>Portal name</b> | 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 |
| <b>Locale</b>      | The interface language of the portal. This field is required   |
| <b>Skin</b>        | The skin of the portal   |

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

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

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



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

**Step 6:** Set access and edit permission for this portal by clicking on 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:

Portal Templates Portal Setting Properties **Permission Setting**

Access Permission Setting Edit Permission Setting

Make it public (everyone can access): ☐

| Group Id   | Membership Type | Action |
|------------|-----------------|--------|
| Empty data |                 |        |

Add Permission

Save Cancel

You can assign the access permission to everyone by checking the **Make it public** check box or clicking on the **Add Permission** button to assign the access permission to a specific group which is selected from the **Select Permissions** form (By selecting a group on the left and a corresponding membership on the right):

Portal Templates Portal Setting Properties **Permission Setting**

Select Permission

Browse and select a group

- Customers
- Organization
- Platform
- Partners

Select a Membership

- member
- author
- editor
- manager
- redactor
- validator
- \*

Save Cancel

Illustration 12: The Select Permission form

After selecting groups, the access permission list is displayed:

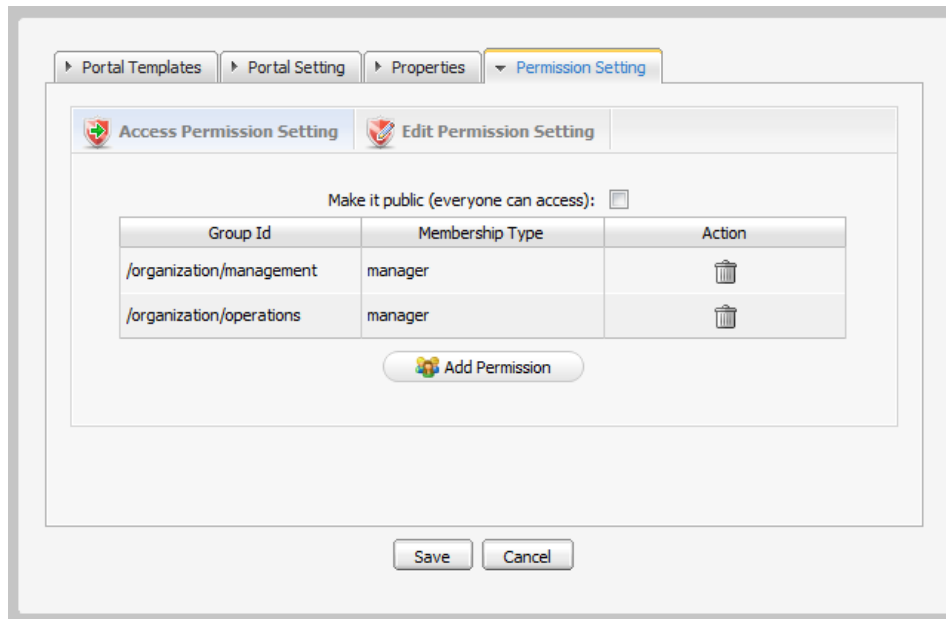


Illustration 13: The Access Permission list in the Permission Setting tab

In which, the icon is used to remove its corresponding group from the Access Permission list.

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

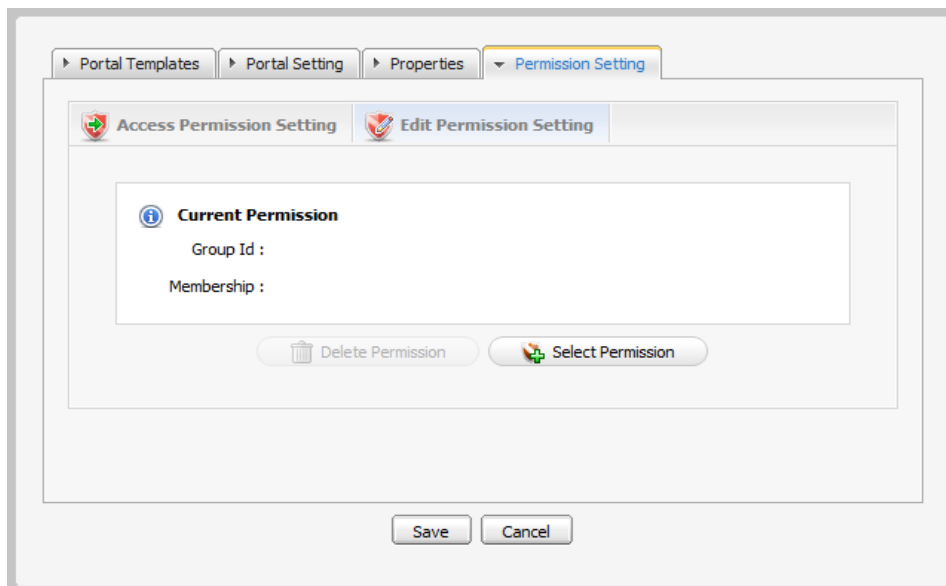


Illustration 14: The Edit Permission Setting tab

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

membership on the right panel:

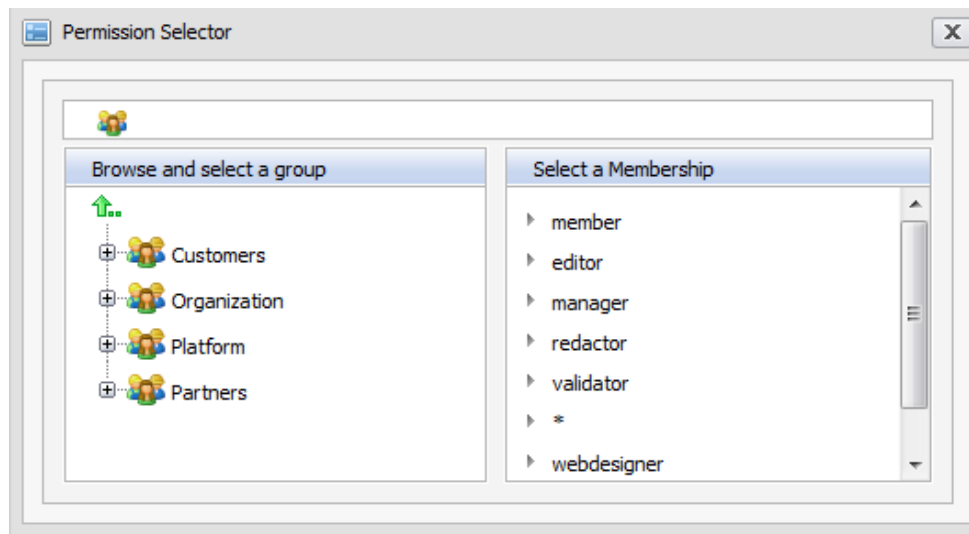


Illustration 15: Permission Selector form

The (\*) from the Select a Membership panel means that you assign the right for everyone in the selected group from left panel.

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

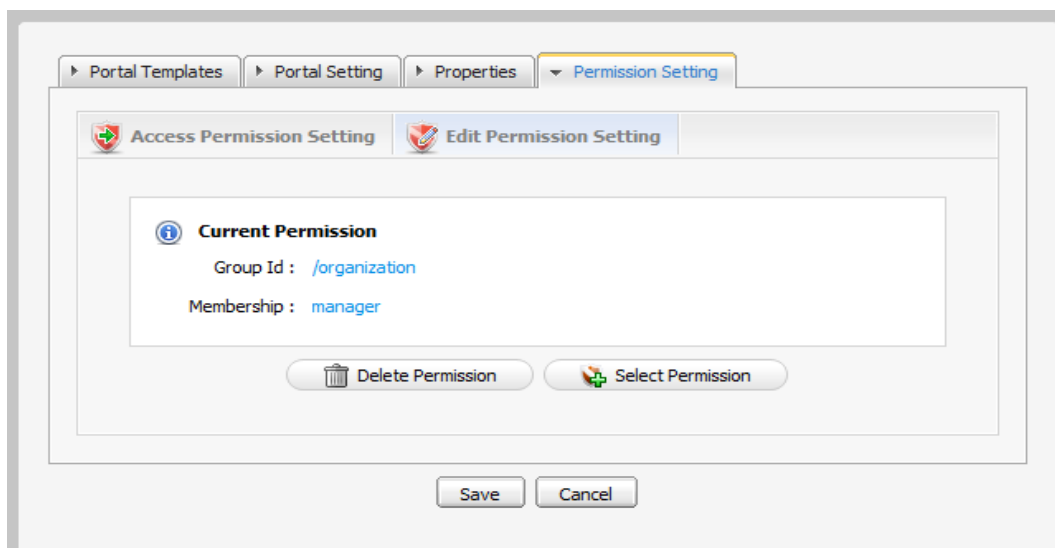


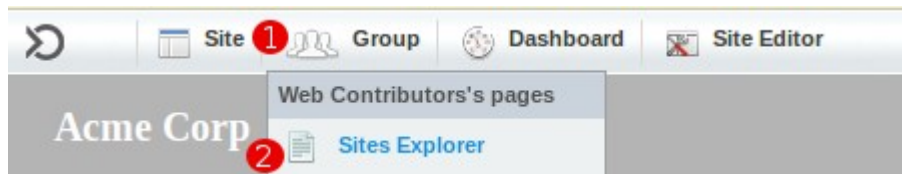
Illustration 16: The Current Permission with the detailed information

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

**Step 7:** Click the **Save** button 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** on the administrator bar → **Sites Explorer** → **Drive**.



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

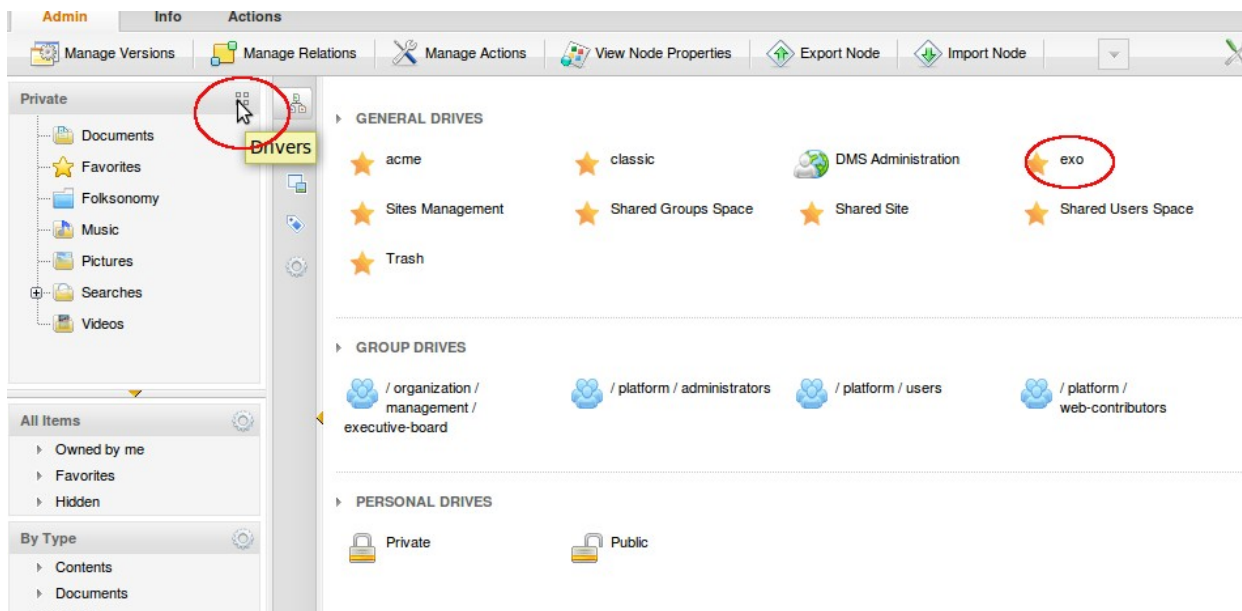


Illustration 17: Drives in Sites Explorer page

### 3.2.2 Edit a site

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

You have two modes:

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

### 3.2.2.1 Turn on the edit mode of the site

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

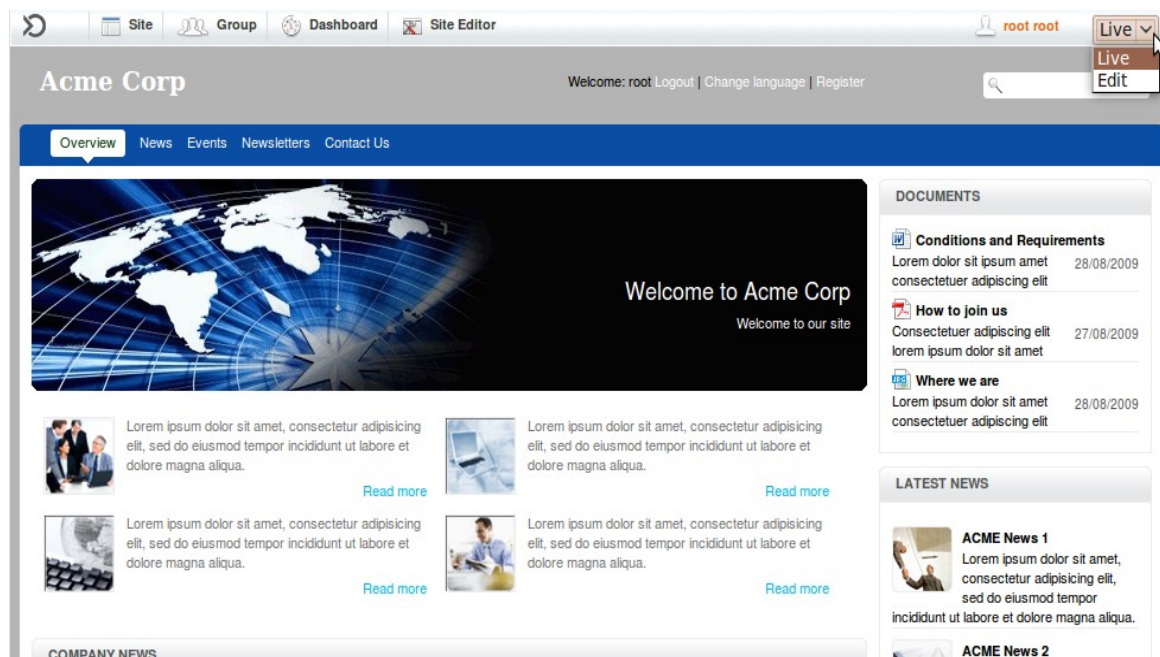

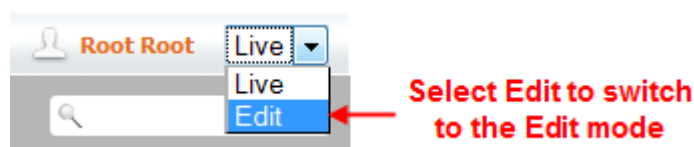


Illustration 18: The Site In Live Status

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



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

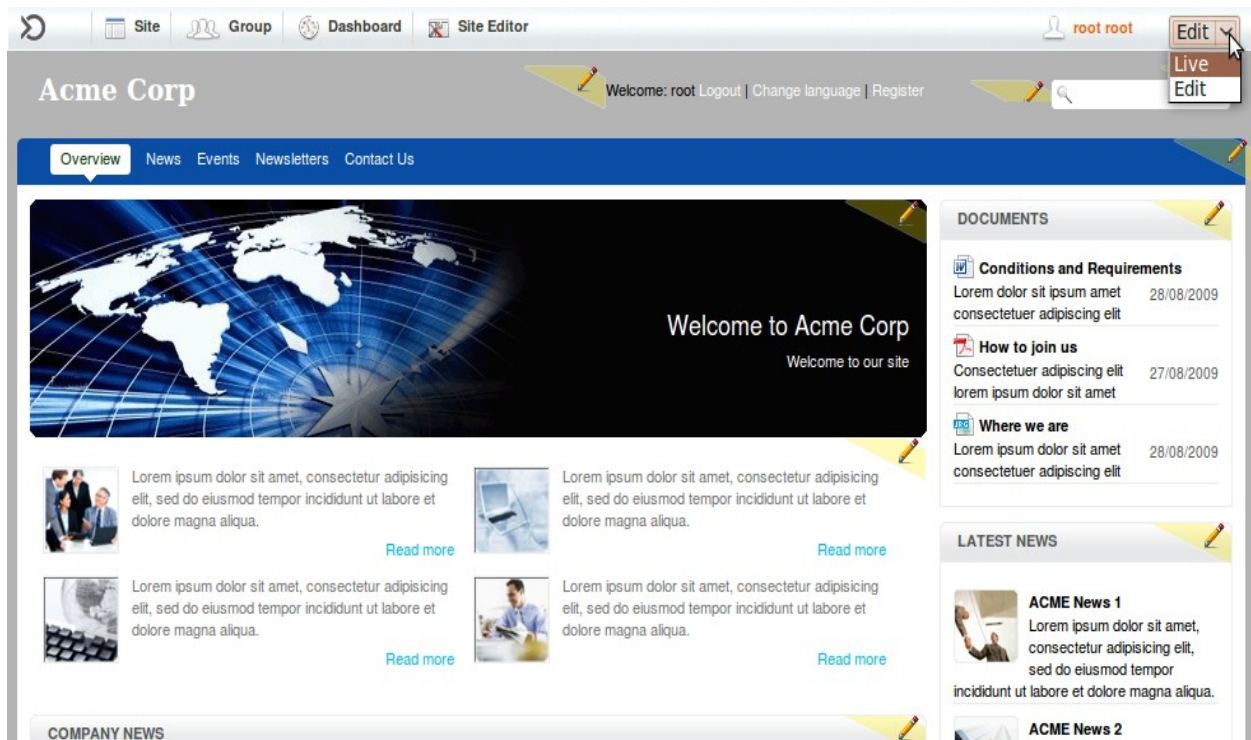
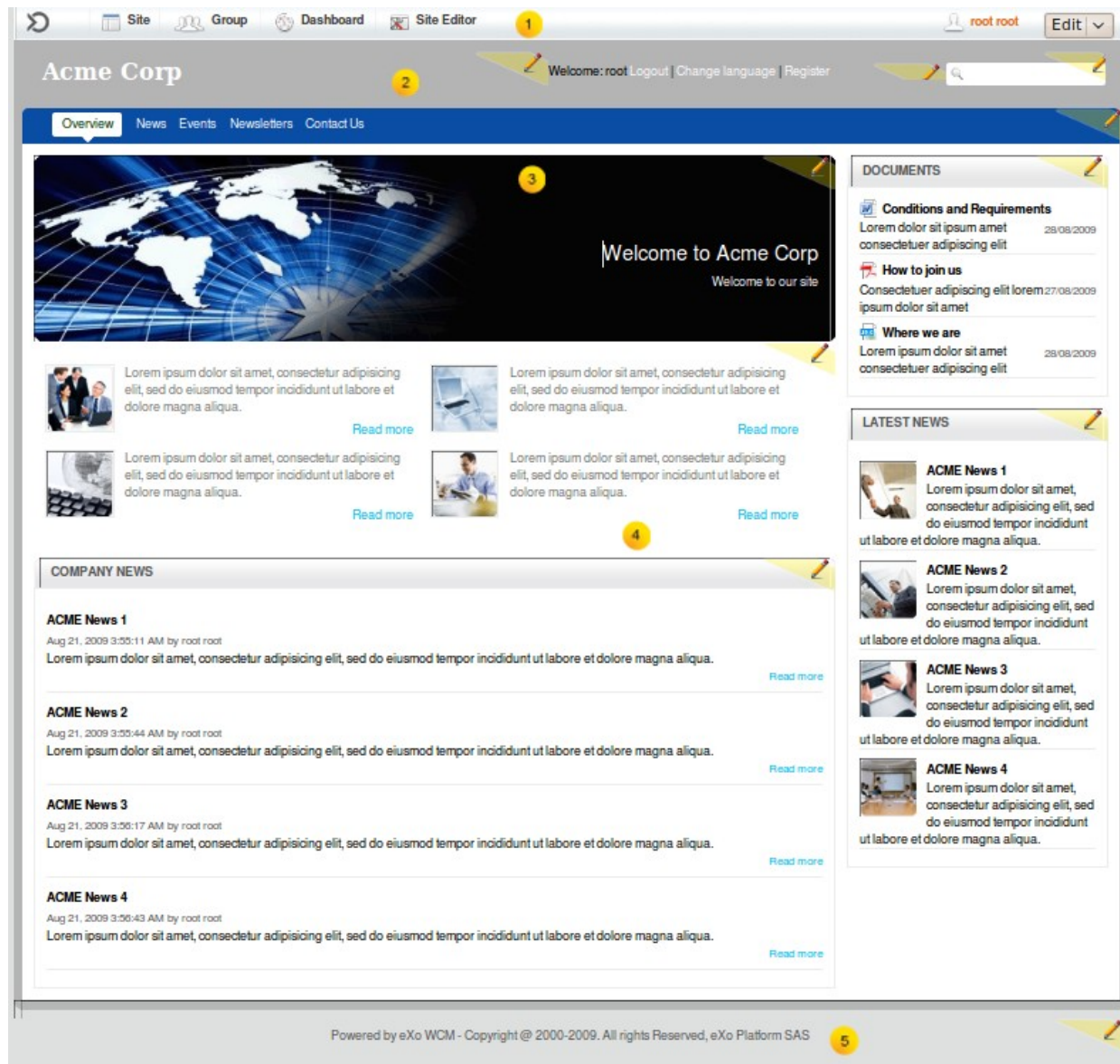


Illustration 19: The site in Edit status

### 3.2.2.2 The structure of a site interface

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





**Illustration 20: The Interface of the portal**


Detail:

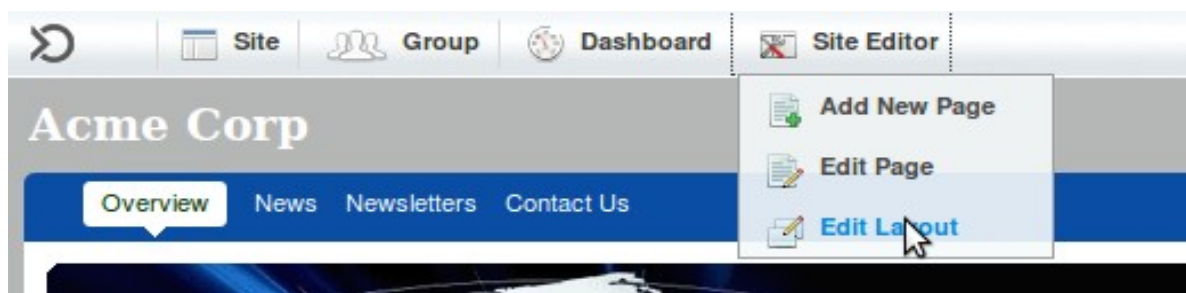
| Indicator | Meaning   |
|-----------|---|
| 1         | This is <b>Administration bar</b> which contains some administration functions related to portals (websites)  |
| 2         | This is <b>Banner</b> which contains organization's slogan, logo, icon used in websites   |
| 3         | This is <b>Navigation bar</b> that helps the website' s users to visualize the structure of website and provide quick links to different pages  |
| 4         | This is the page content area to display the content of current selecting page  |
| 5         | This is <b>Footer</b> of the website. It can be texts, an image that is displayed at the bottom of the website. It provides information about author/institutional sponsor, revision date, copyright, etc |

### 3.2.2.3 How to edit a site?

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

#### a) Edit the properties of the Website:

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







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



**Illustration 21: The Edit Portal Form**

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

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

## b) The layout of Edit Website:

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


### Edit banner

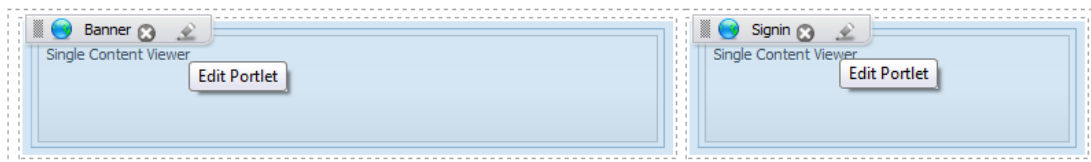
In **eXo WCM**, the banner is divided into two parts: a left banner and a right banner. You can edit both of them.

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

**The 1<sup>st</sup> 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 2<sup>nd</sup> way:** Click the edit  icon at the right corner of the **classic - banner** portlet (for the left banner) or **classic- access** portlet (for the right banner) in the **Edit Portal** form



A form to edit the current banner will appear:

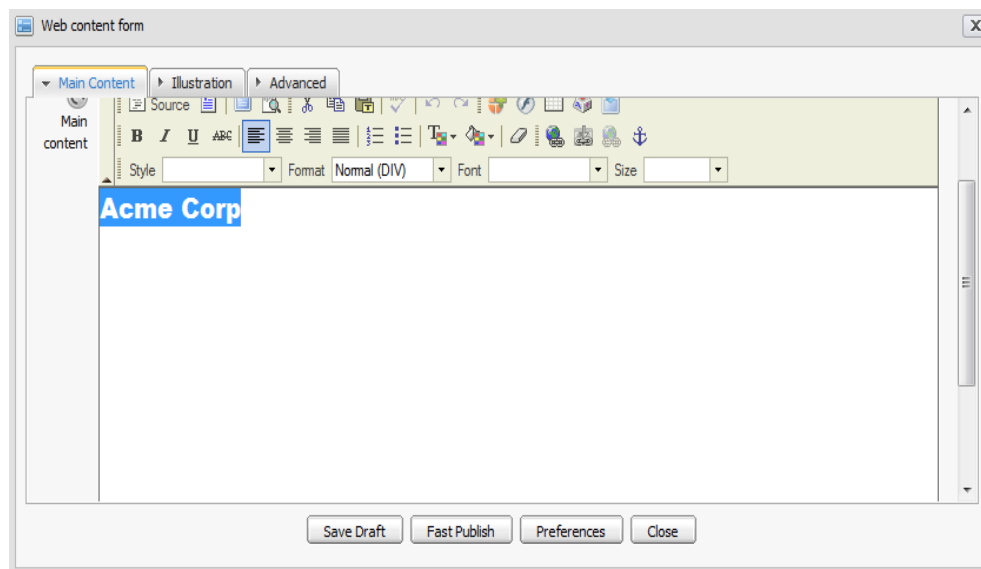


Illustration 22: Edit left Banner

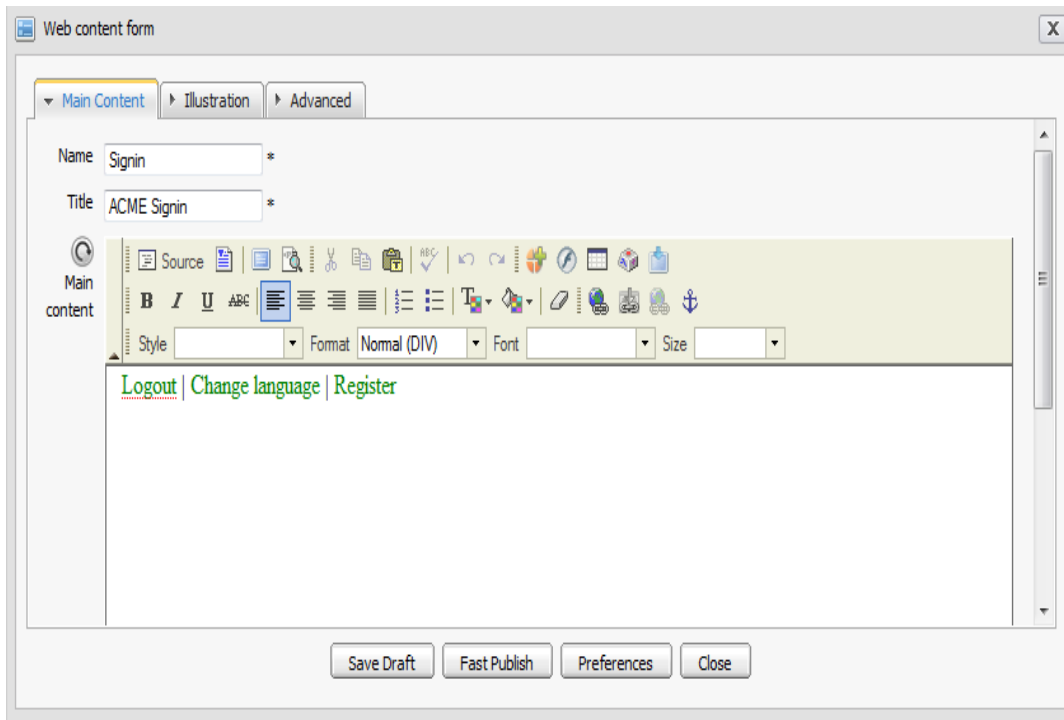


Illustration 23: Edit right banner

Details:

The **Main Content** tab includes:

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

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

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

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

**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 the **Save** button 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 on the edit icon corresponding to that group/user. Then change the current permission by checking check boxes in the edit form below:

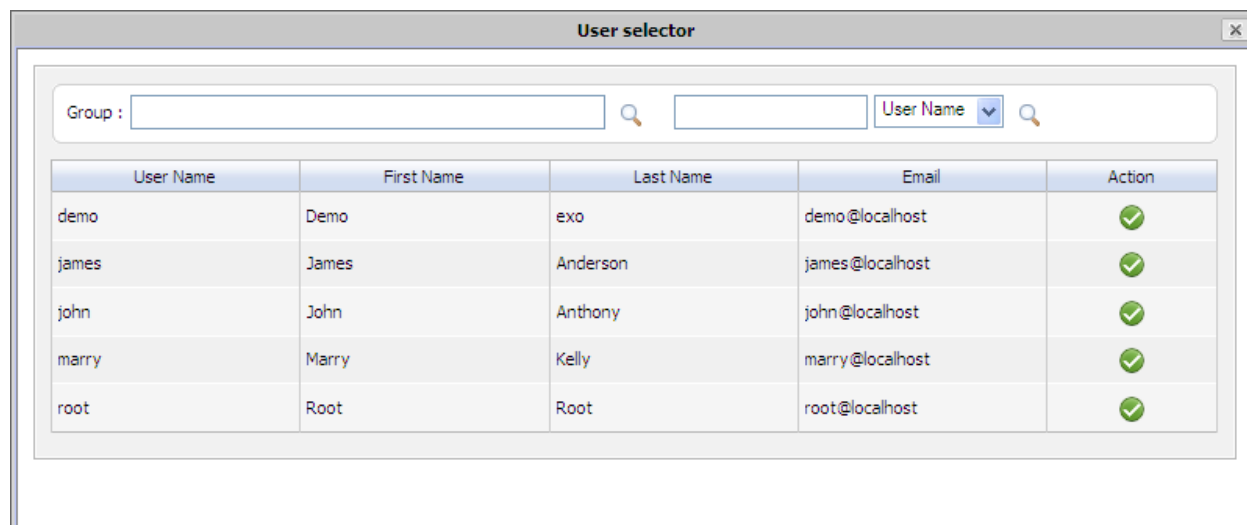
Permission

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 on the icon.

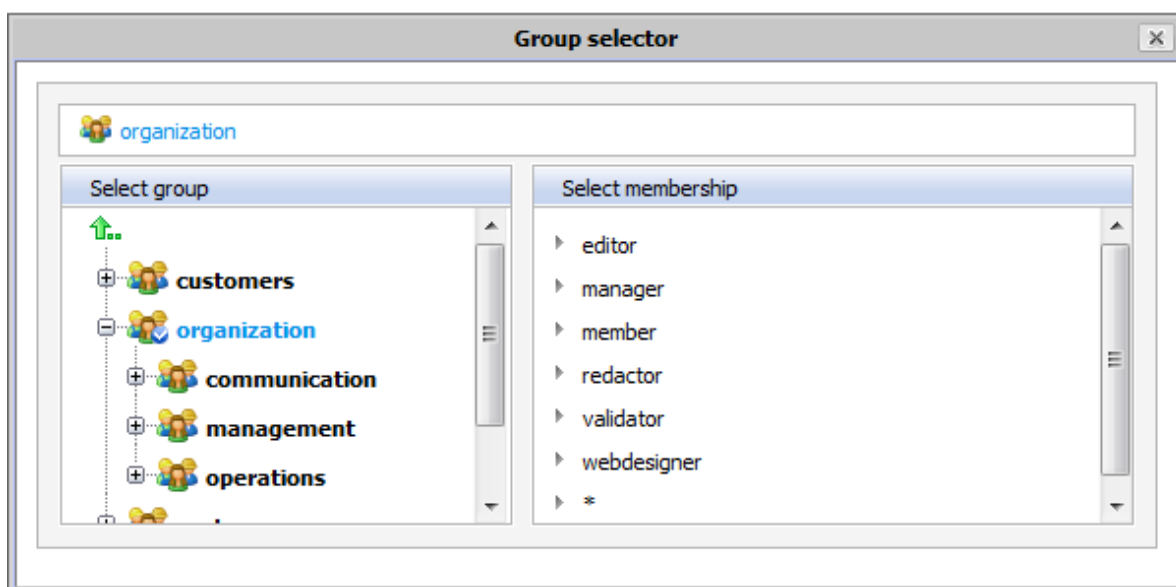


The User selector form is a window titled "User selector". It contains a search bar at the top with a "Group:" label, a search icon, and a dropdown menu labeled "User Name" with a search icon. Below the search bar is a table with the following data:

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

Illustration 24: The User selector form

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



The Group selector form is a window titled "Group selector". It contains a search bar at the top with a group icon and the text "organization". Below the search bar are two panels:

- Select group:** A list of groups with expand/collapse icons: customers, organization (selected), communication, management, and operations.
- Select membership:** A list of membership roles: editor, manager, member, redactor, validator, webdesigner, and \*.

Illustration 25: The Group selector form

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

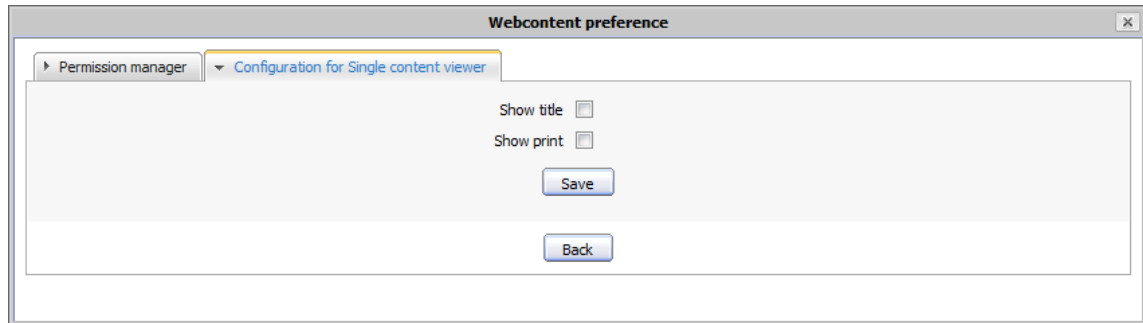
After selecting users/groups, set permission for these users/groups by checking the Access Right check box (for only the access right) or the Edit Right check



box (for only the edit right) or checking both check boxes if you want.

**5.3** Accept and save permissions by clicking on the **Save** button.

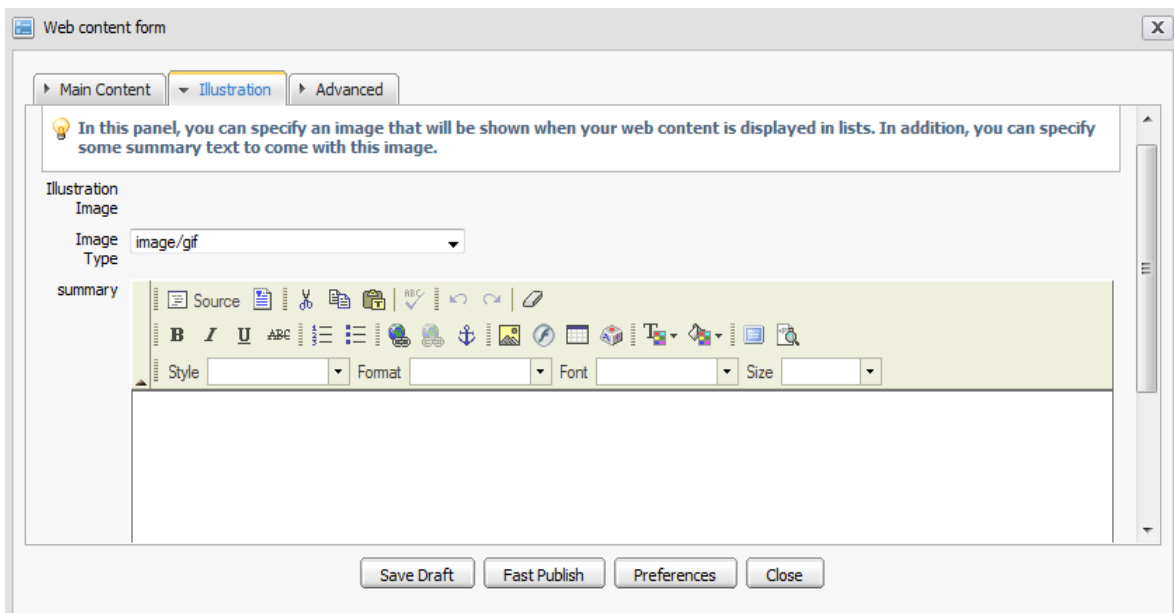
- The **Configuration for Single content viewer** tab includes:



Details:

|                   |  |
|-------------------|--|
| <b>Show title</b> | The option is whether to show the title of this content or not |
| <b>Show print</b> | The option is whether to show the print function or not        |

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



**Illustration 26: The Illustration tab in the Web content form**

Details:

|                           |   |
|---------------------------|---|
| <b>Illustration Image</b> | The path to an image that you want to upload into the site. This image will be used like an illustration of that site.  |
| <b>Image Type</b>         | The image format that you want to upload to the site. The image file format can be gif, png, jpg or jpeg.   |
| <b>Summary</b>            | 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 on the **Browse...** button and then select a specific location.
- Select an image in the list to upload.
- The **Advanced** tab:

this tab includes two parts: CSS data and JS data:

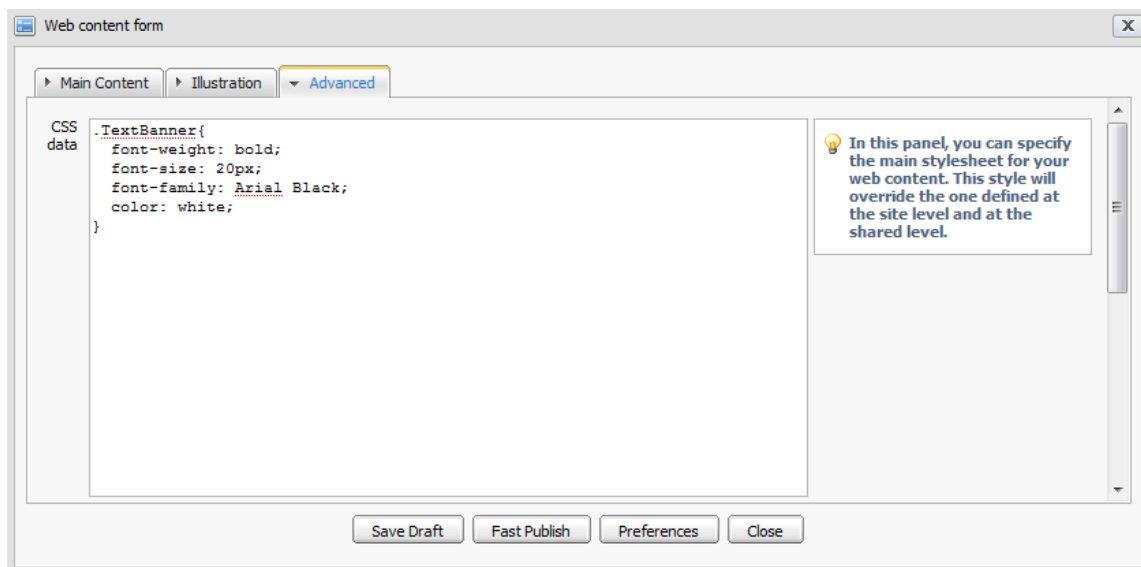


Illustration 27: The Advanced tab in the Web content form


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

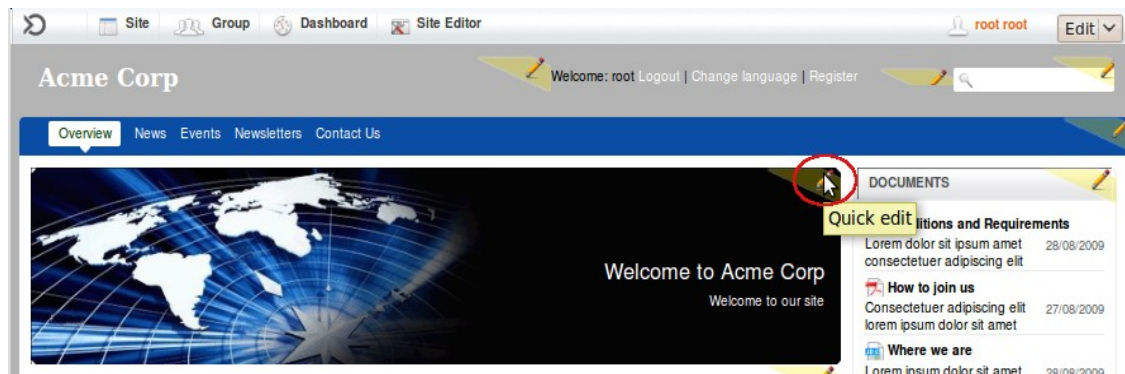
**JS data:** It contains JS content to make the web content dynamically when being published. You can optionally enter JS content in this field.

## Edit homepage

eXo 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 on the edit icon  at the right corner of the home page:



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

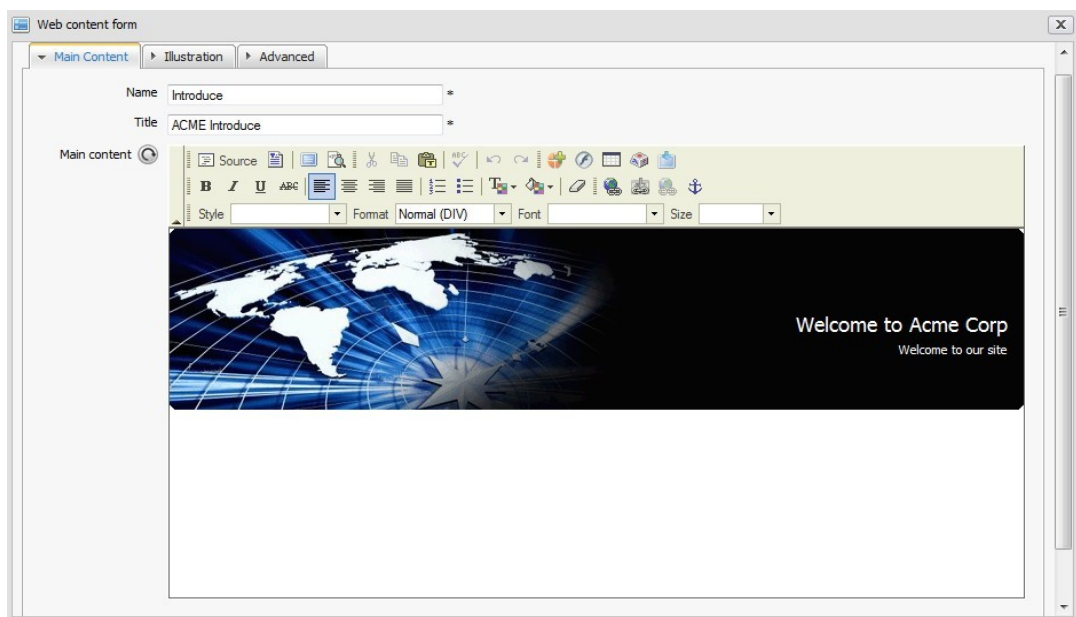


Illustration 28: The Edit homepage form in Single Content Viewer

**Step 2:** Change values in this form.

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

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


## Edit footer

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


Do the following steps:

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

**The 1<sup>st</sup> 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 2<sup>nd</sup> way:**

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



The form to edit the current footer will appear:

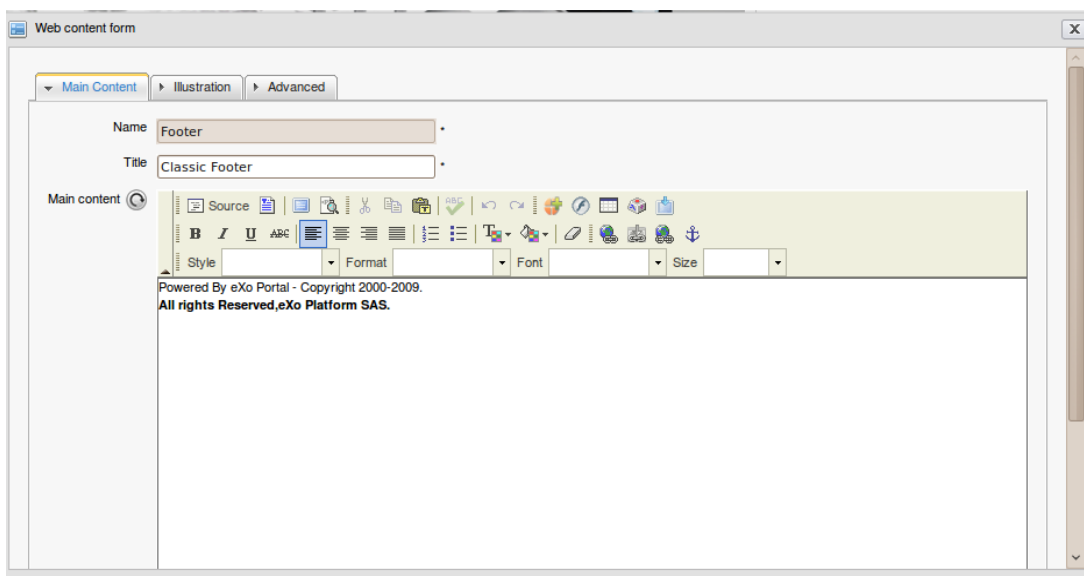


Illustration 29: The Foot Edit form in Web content form

**Step 2:** Change values of this form.

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

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

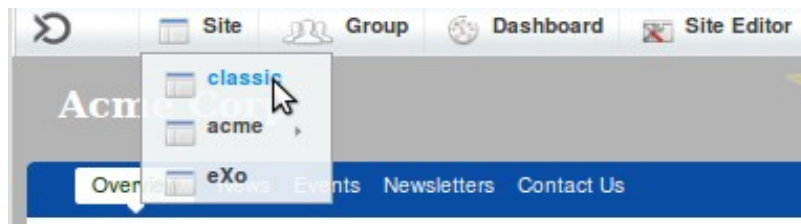


The Banner, Home page and Footer of a site are shared to others. Thus, all their changes will impact on the entire site. So you should copy the shared banner, home page and footer to a specific portal folder and refer to them when you need

### 3.2.3 Switch between sites

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

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

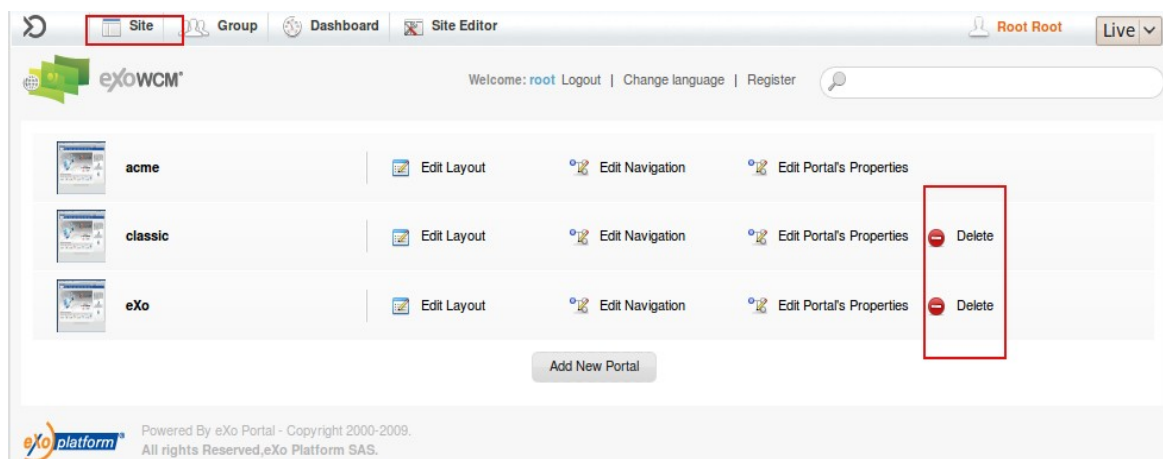


Your current site will be switched to the selected site.

### 3.2.4 Delete a site

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

Do the following steps:



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

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

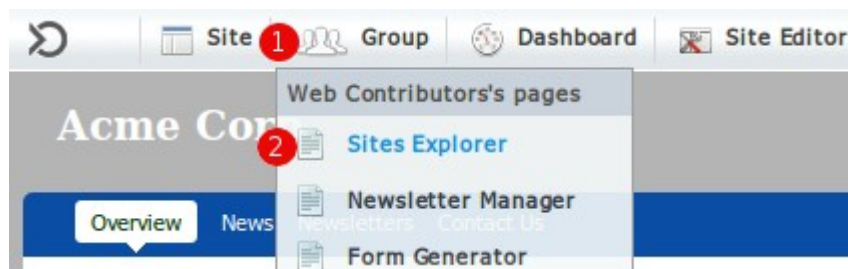
**Step 3:** Click the OK button in the confirmation message to accept deleting.

## 3.3 Manage The Site Content by Sites Explorer

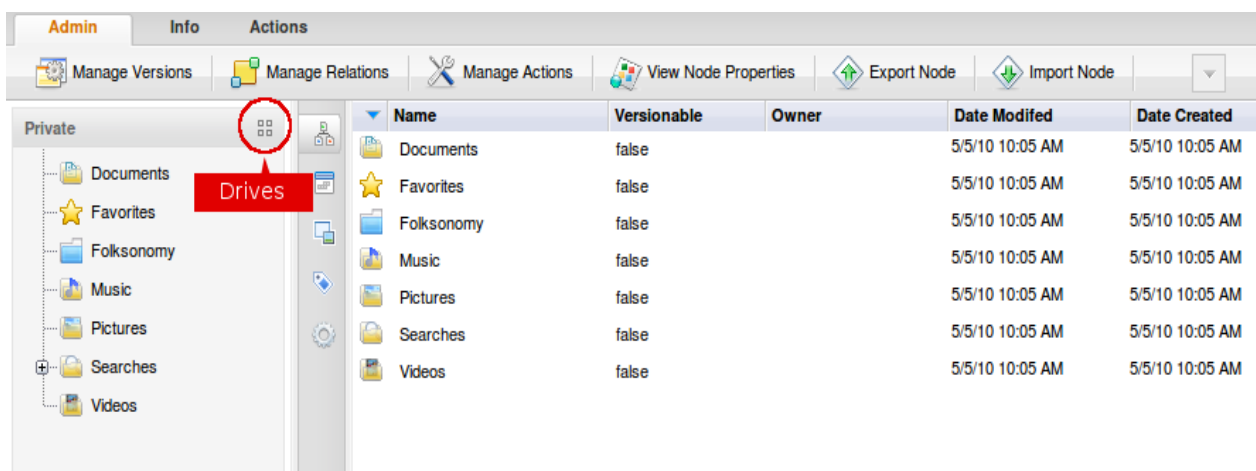
### 3.3.1 Access Sites Explorer

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

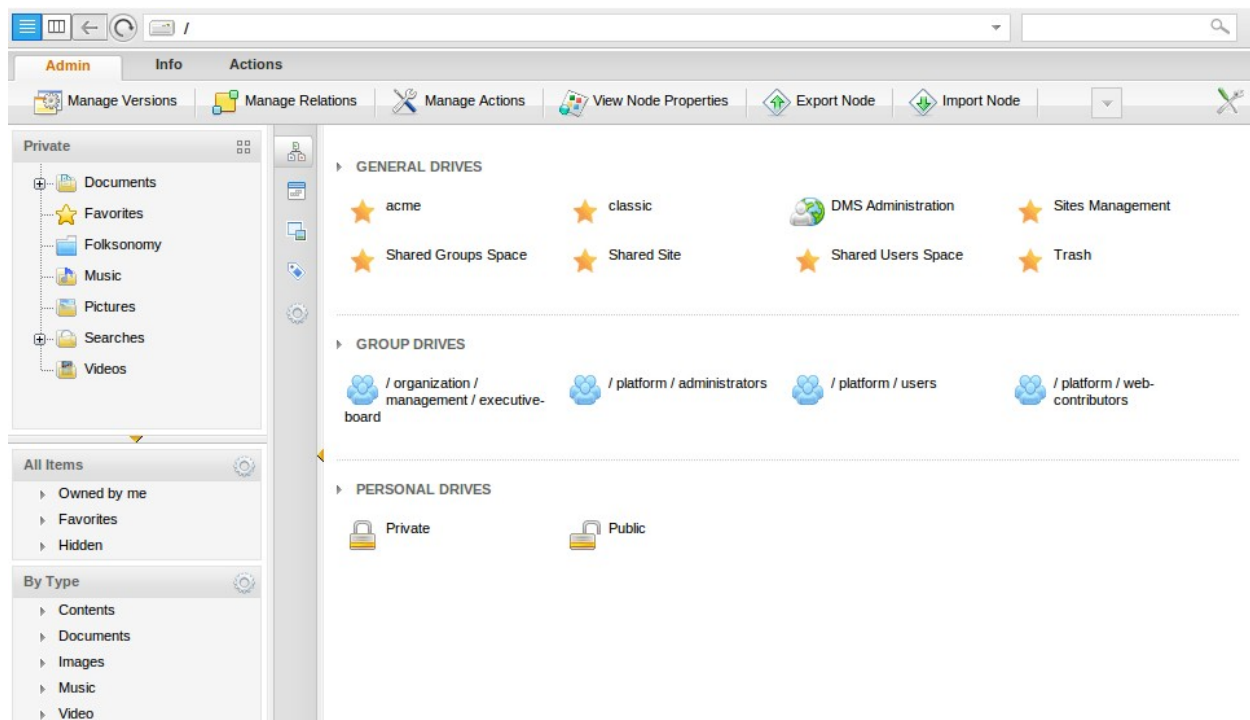
Go to **Sites Explorer** on the administration bar:



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



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



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

#### ▶ PERSONAL DRIVES



Private

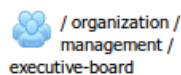


Public

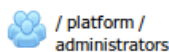
**Group drives:** The drive of a group is the working space of users in that group.

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

#### ▶ GROUP DRIVES



/ organization /  
management /  
executive-board



/ platform /  
administrators



/ platform / users



/ platform /  
web-contributors

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



## 3.3.2 Drives in Sites Explorer

### 3.3.2.1 Private drive

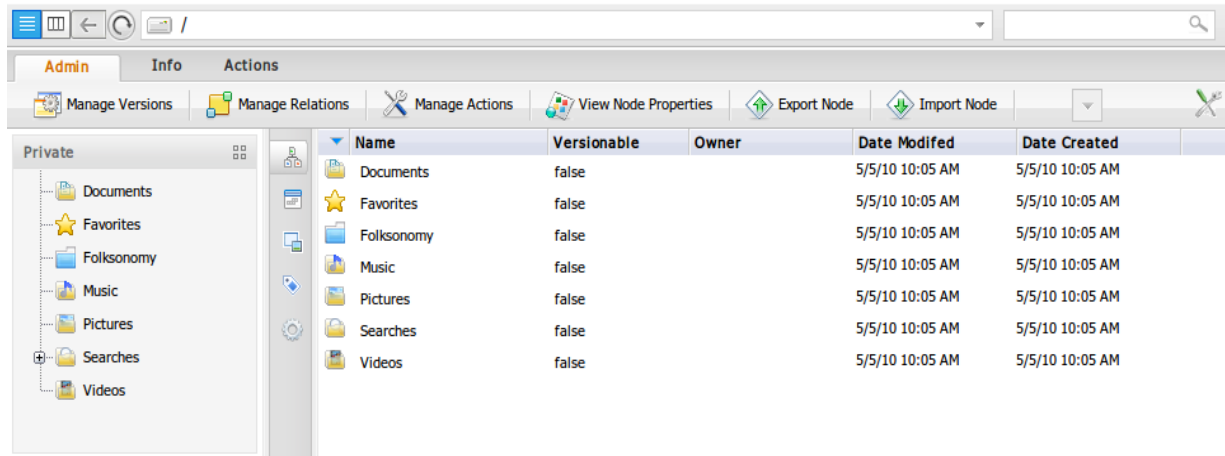
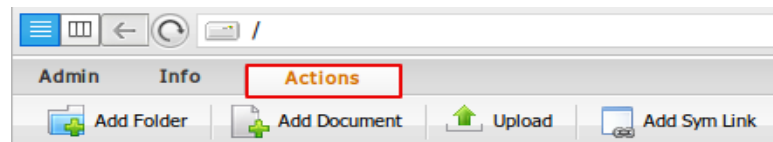


Illustration 30: The private drive

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

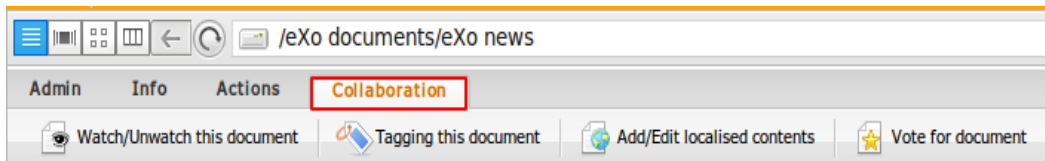
By default, there are some initialized folders to store private user's resources.

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



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

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



1. Watch/Unwatch a document.
2. Add tags for a document.
3. Set multi-display languages for document.
4. Vote for a document.
5. Comment for a document.

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

1. Do the simple search
2. Do the advanced search with more constraints, add new query to search
3. Do search by existing queries.

- ◆ In addition, you can:

1. Setup your browsing preferences
2. Cut/paste, Copy/past, Delete a node
3. Lock a node
4. Rename a node
5. Use the view WebDAV function to view document content.
6. Download documents (folders) to your machine.

### 3.3.2.2 Public drive

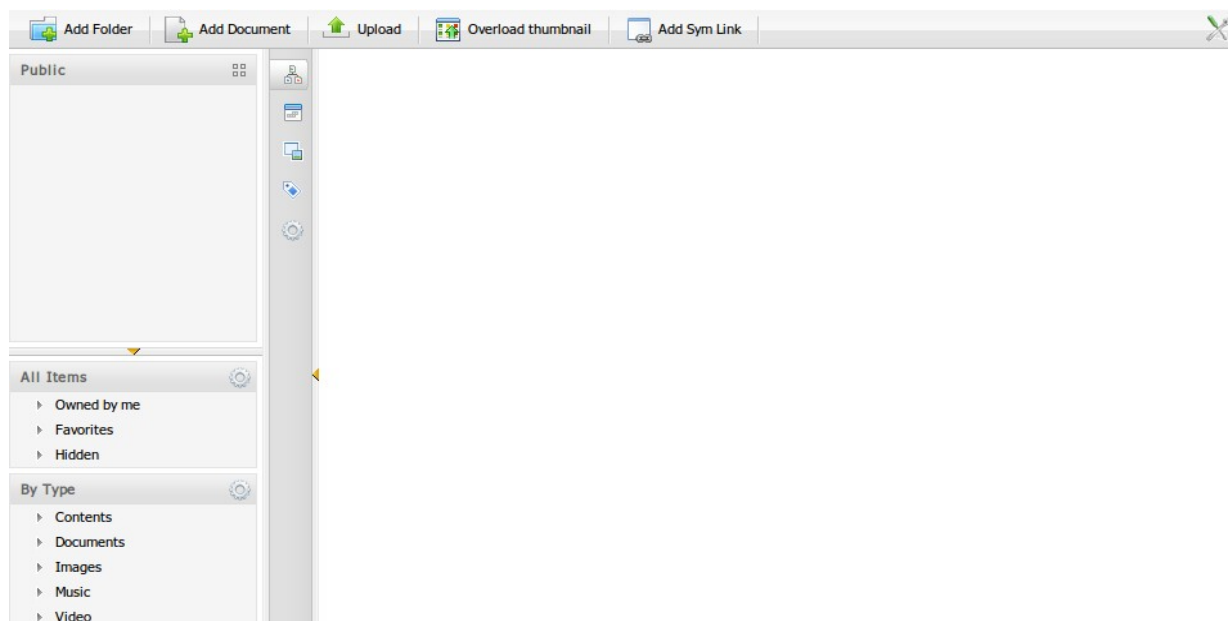


Illustration 31: The Public drive

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

### 3.3.2.3 Drive of a specific group

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

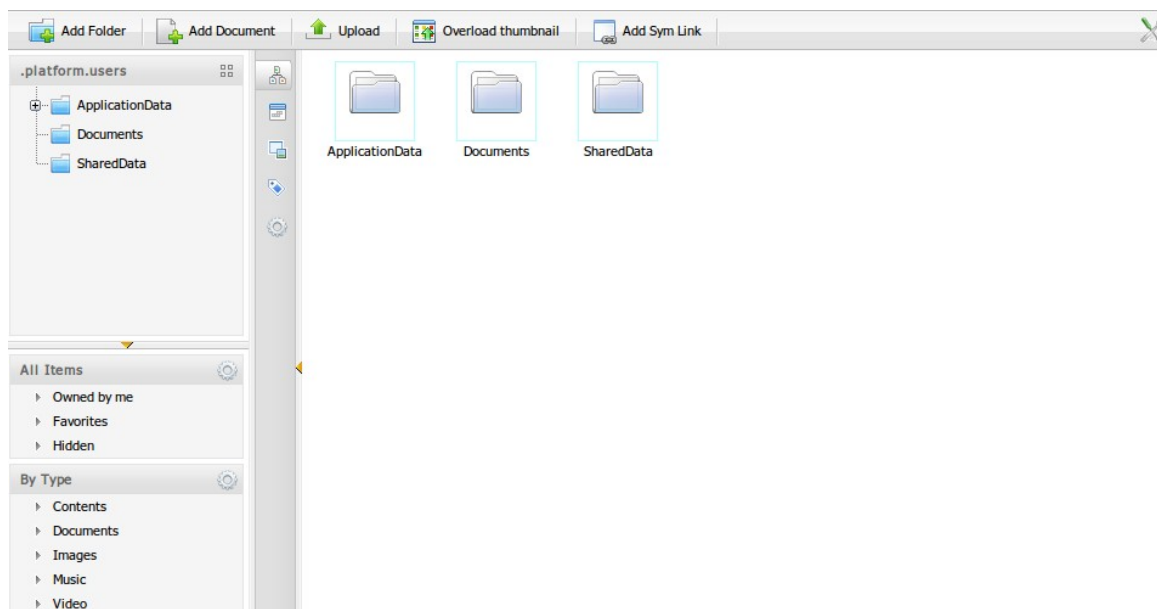


Illustration 32: Platform/User group

### 3.3.2.4 Shared Users Space drive

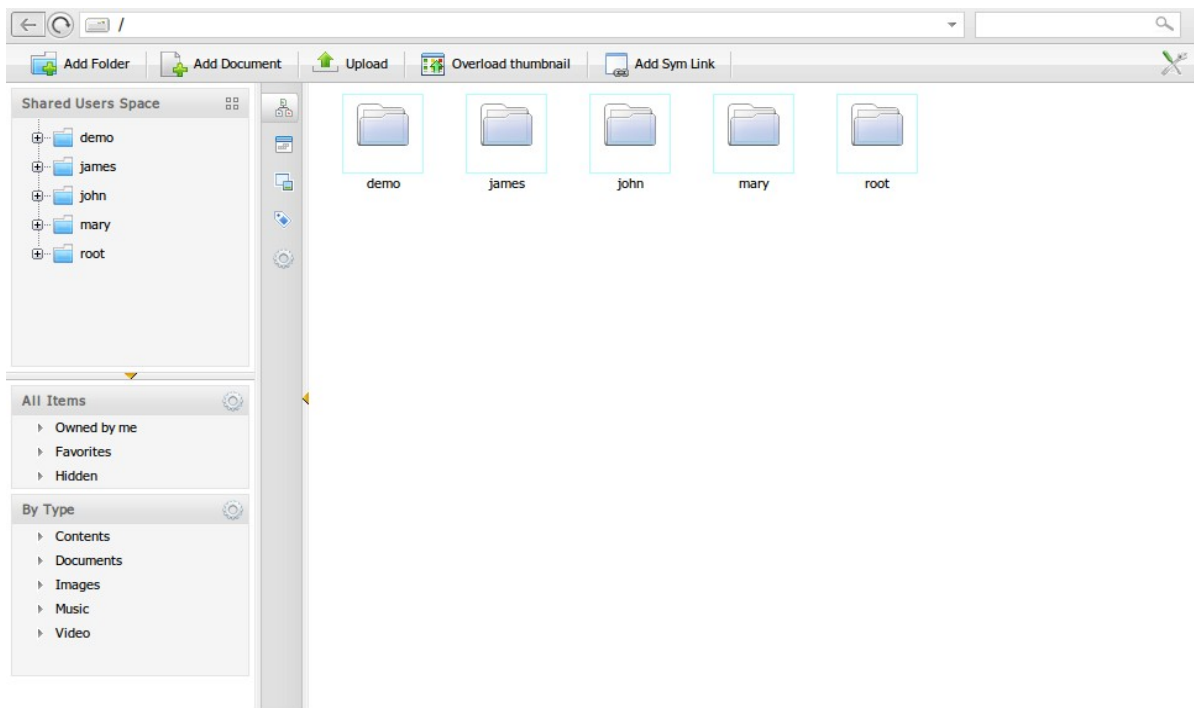


Illustration 33: The Shared Users Space drive

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

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

### 3.3.2.5 Show/hide the side bar 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 1<sup>st</sup> way:**

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

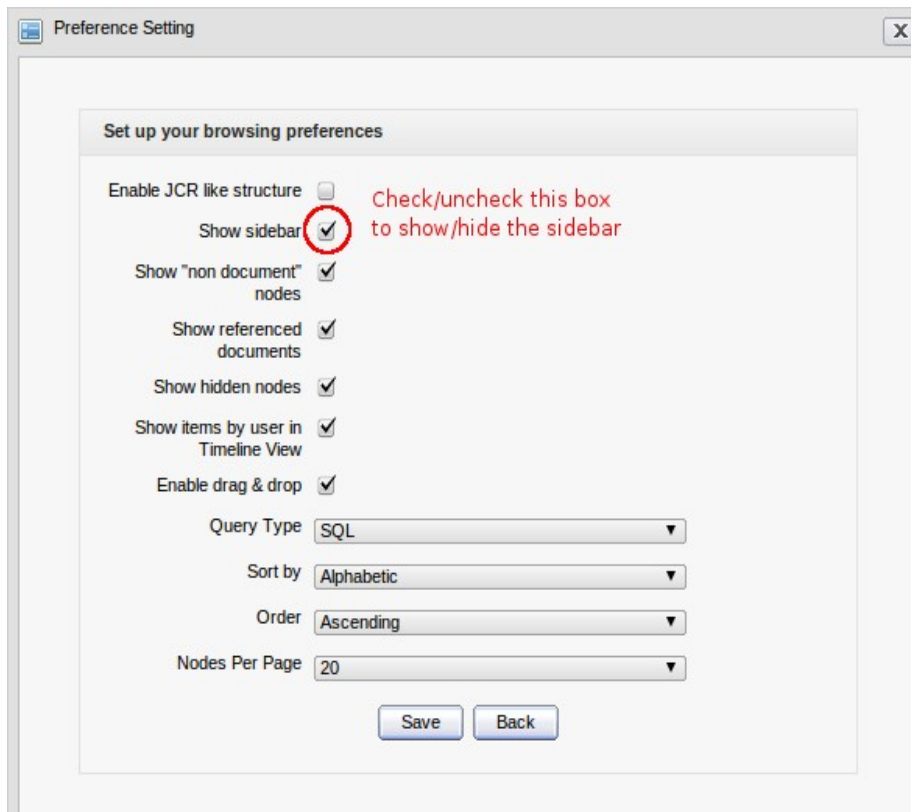


Illustration 34: The preference setting

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

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

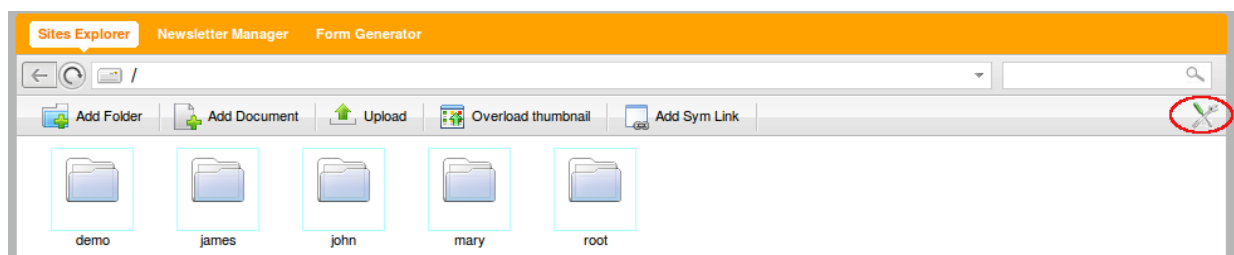
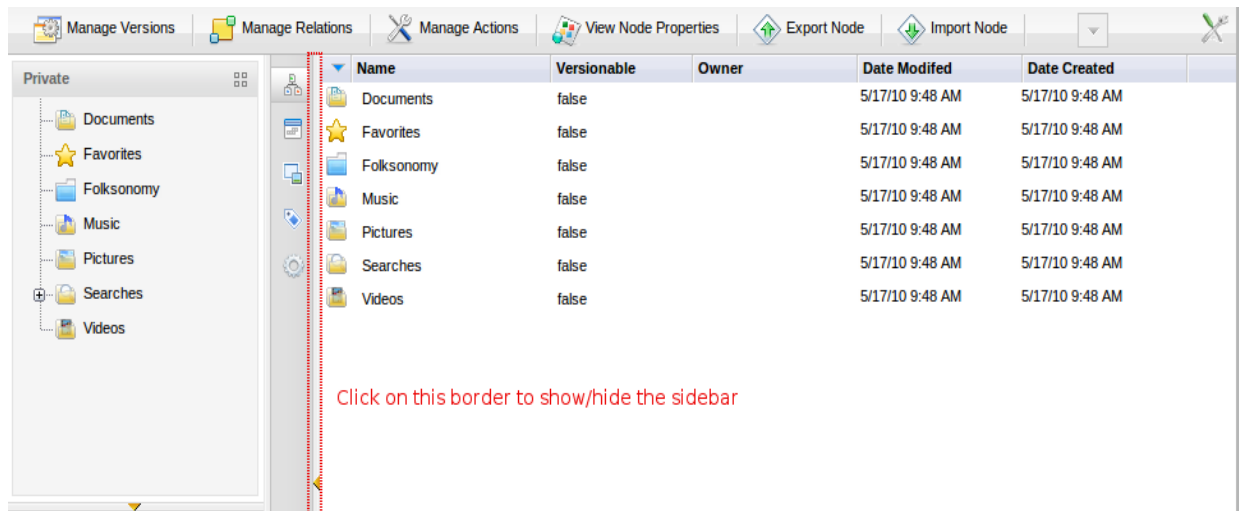


Illustration 35: The hidden side bar

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

**The 2<sup>nd</sup> way:**

Simply click the border of this sidebar to hide it.



Click that border again to show the sidebar back.

### 3.3.3 View types in Sites Explorer

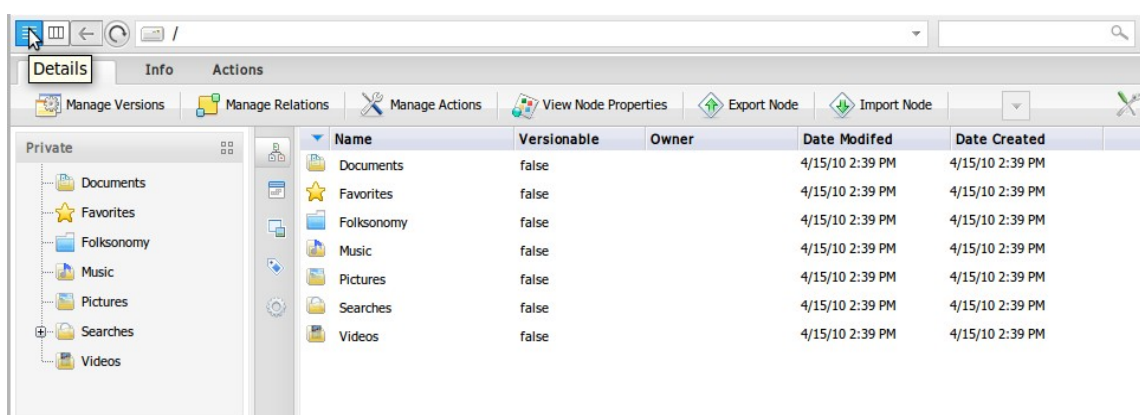
**eXo WCM** supports you four ways to view nodes in a specific folder and show actions of corresponding tab on the **Actions** bar.



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

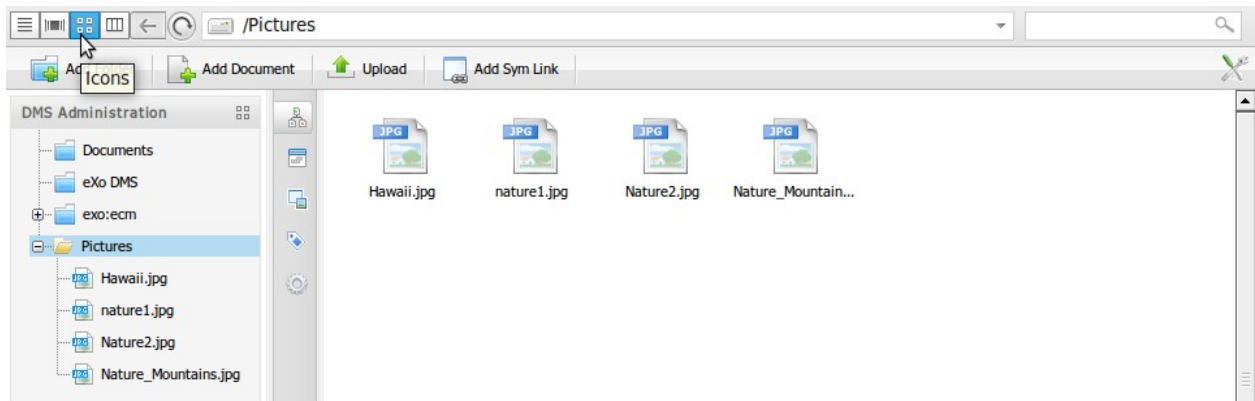
#### 3.3.3.1 Details

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



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

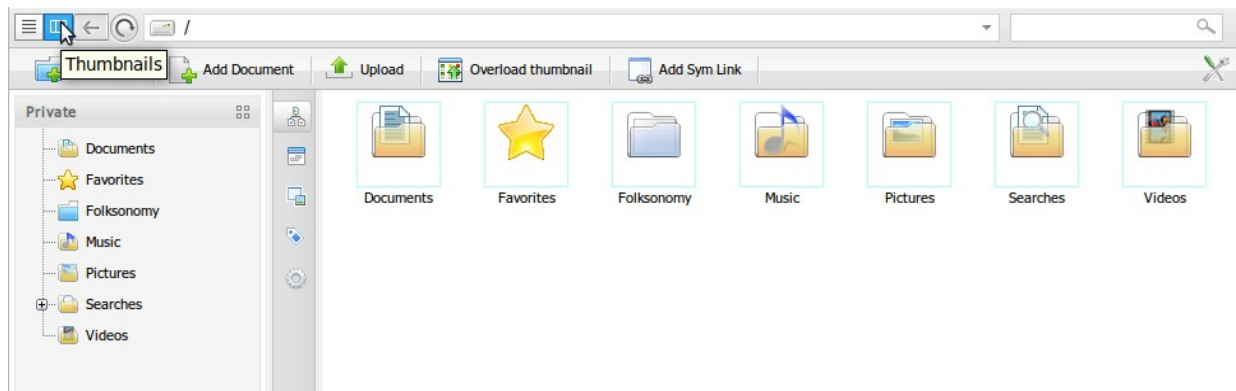
### 3.3.3.2 Icons



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

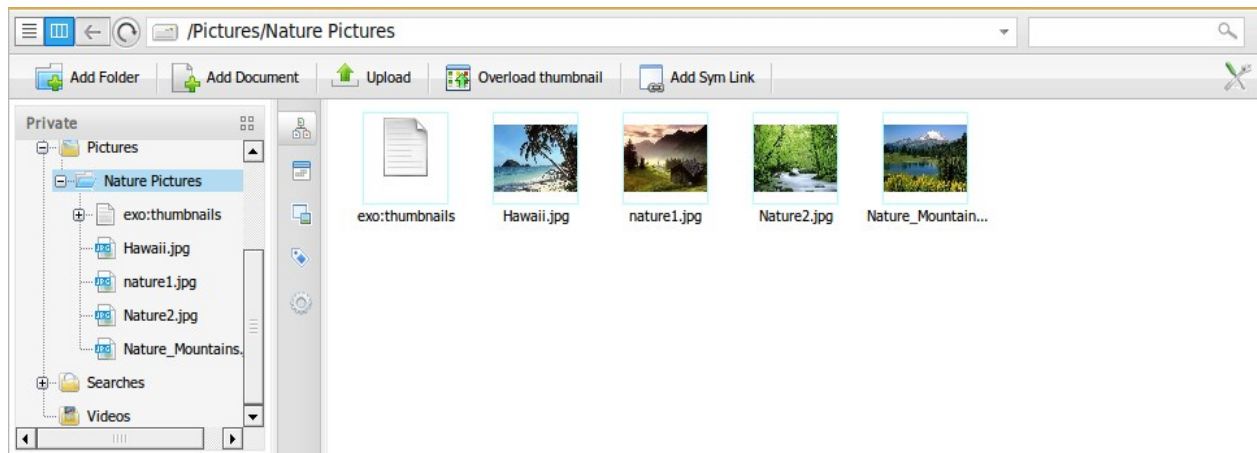
### 3.3.3.3 Thumbnails

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



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





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

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

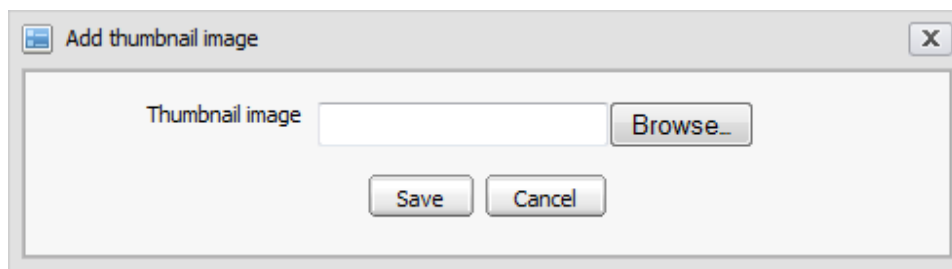


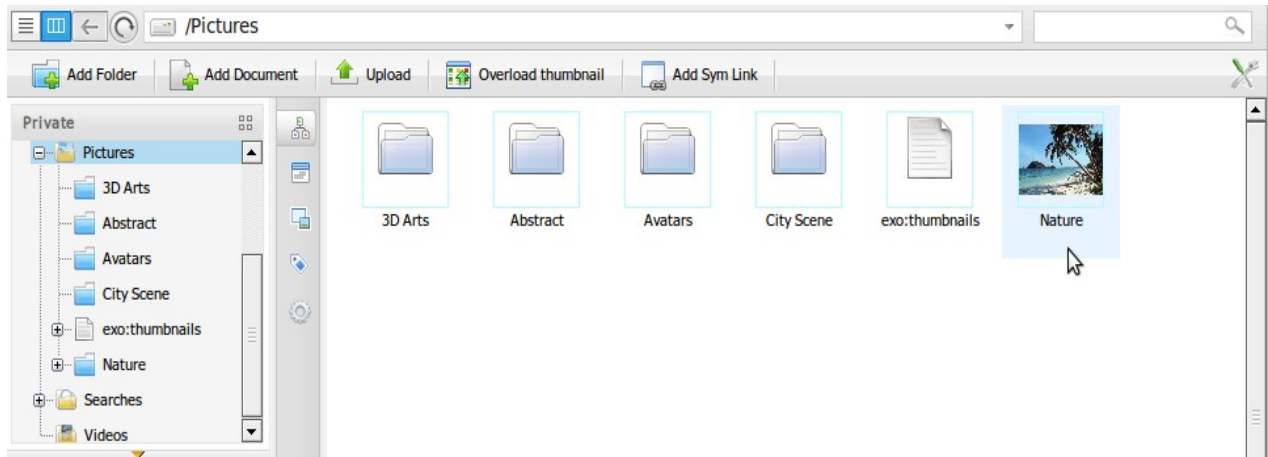
Illustration 36: The Add thumbnail image form

**Step 2:** Click 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.

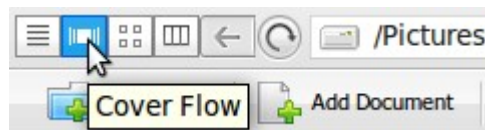
**Step 4:** Complete adding a thumbnail image by clicking the **Save** button. This node will be stored in a `exo:thumbnails` folder.

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



### 3.3.3.4 Cover flow

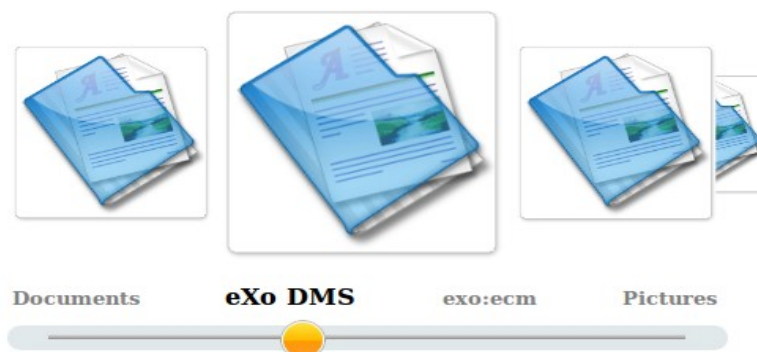
You can understand this view as a dynamical view because it brings the side – scrolling view to nodes in a folder. In this view, when a node is selected, its name is set with bold effect to more outstanding than others.



If nodes are pictures, they are shown like:



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




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

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

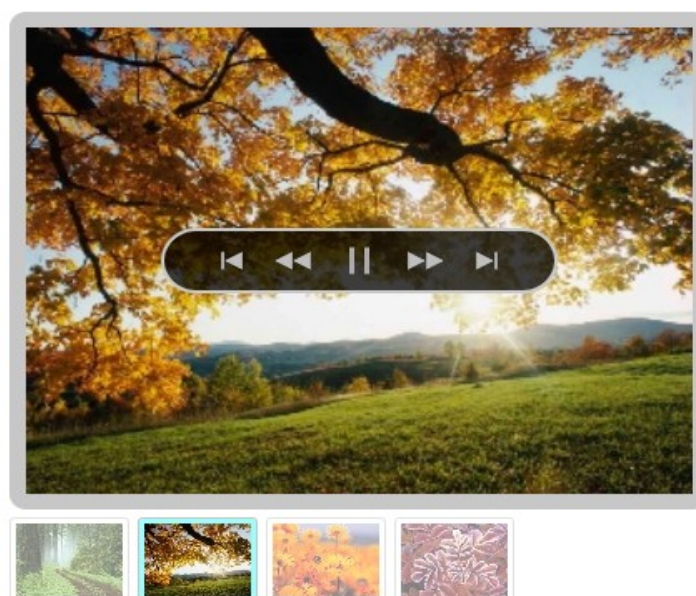
### 3.3.3.5 Slide show

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

To view pictures in slide show, click the  icon:



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



The **Slide show** view automatically show all picture nodes, users can control this slide show by clicking 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.









Continue viewing pictures node.

### 3.3.3.6 Timeline

This view allows users to view all nodes created and uploaded by time. Just click the  icon. All the nodes that were created and uploaded will be displayed like below:



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

|                  | ★ | Name  | Date time        |
|------------------|---|---|------------------|
| <b>Today</b>     |   |   |                  |
|                  | ★ |  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 |
| <b>Yesterday</b> |   |   |                  |
|                  | ★ |  Look More Beautiful With Longer Eyelashes | 2/25/10 5:36 PM  |
|                  | ★ |  Communication Skills                      | 2/25/10 5:55 PM  |

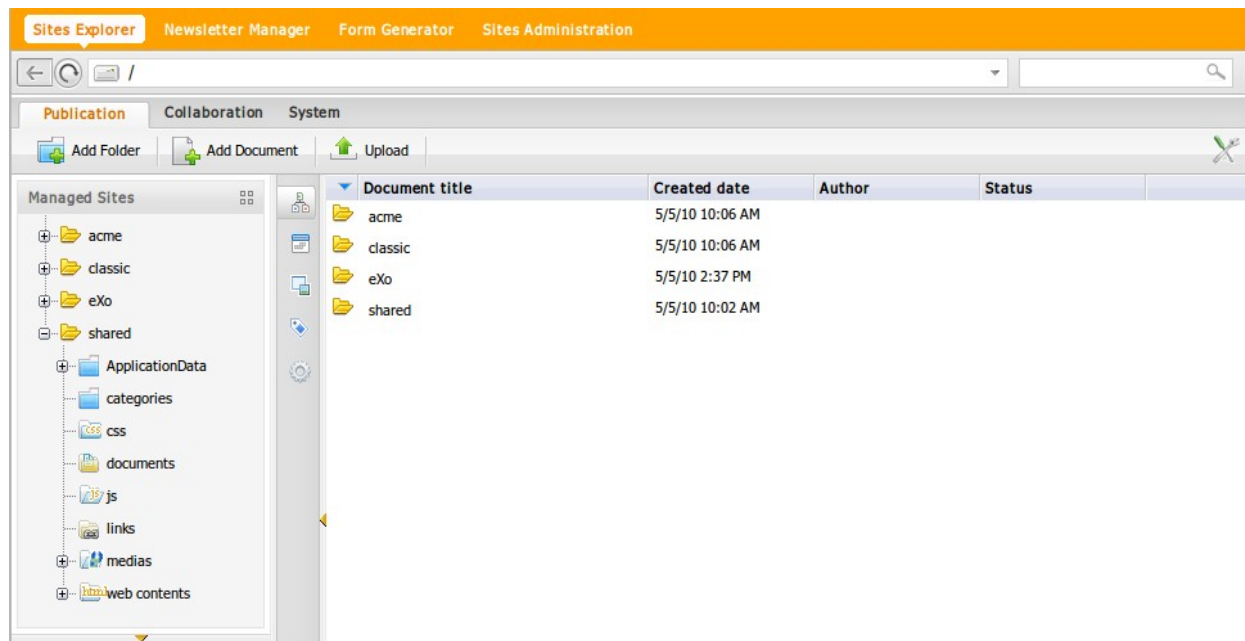
You can also click the ★ to mark your item as favorite or the ★ icon corresponding to nodes in order to remove it from favorites.

### 3.3.4 Actions in Sites Explorer


#### 3.3.4.1 Manage Site Resources in one place

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

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



All sites contain typical folders:

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

#### a) CSS

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



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

## b) Documents

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



Illustration 37: Example of a 'Documents'

folder

## c) JS

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

## d) Links

This file contains all links used in a site.

## e) Media

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



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

## f) Web content

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

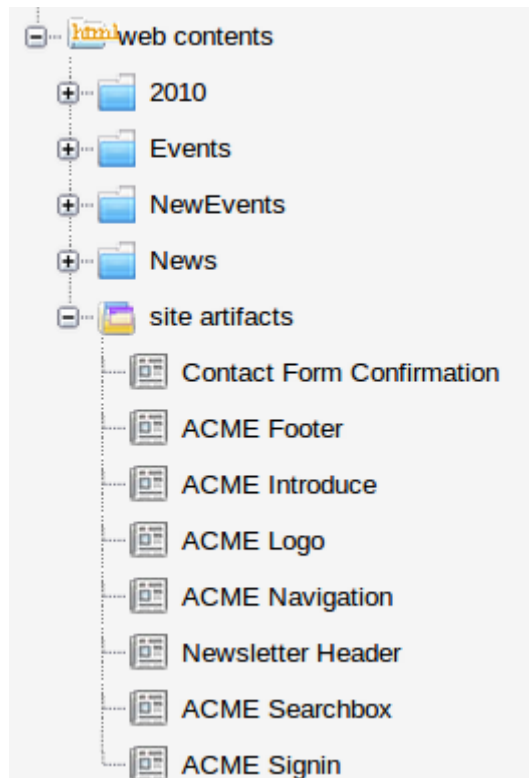


Illustration 38: Example of a 'Web content' folder

### 3.3.4.2 Basic Actions in Sites Explorer

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

#### a) Create a new web content

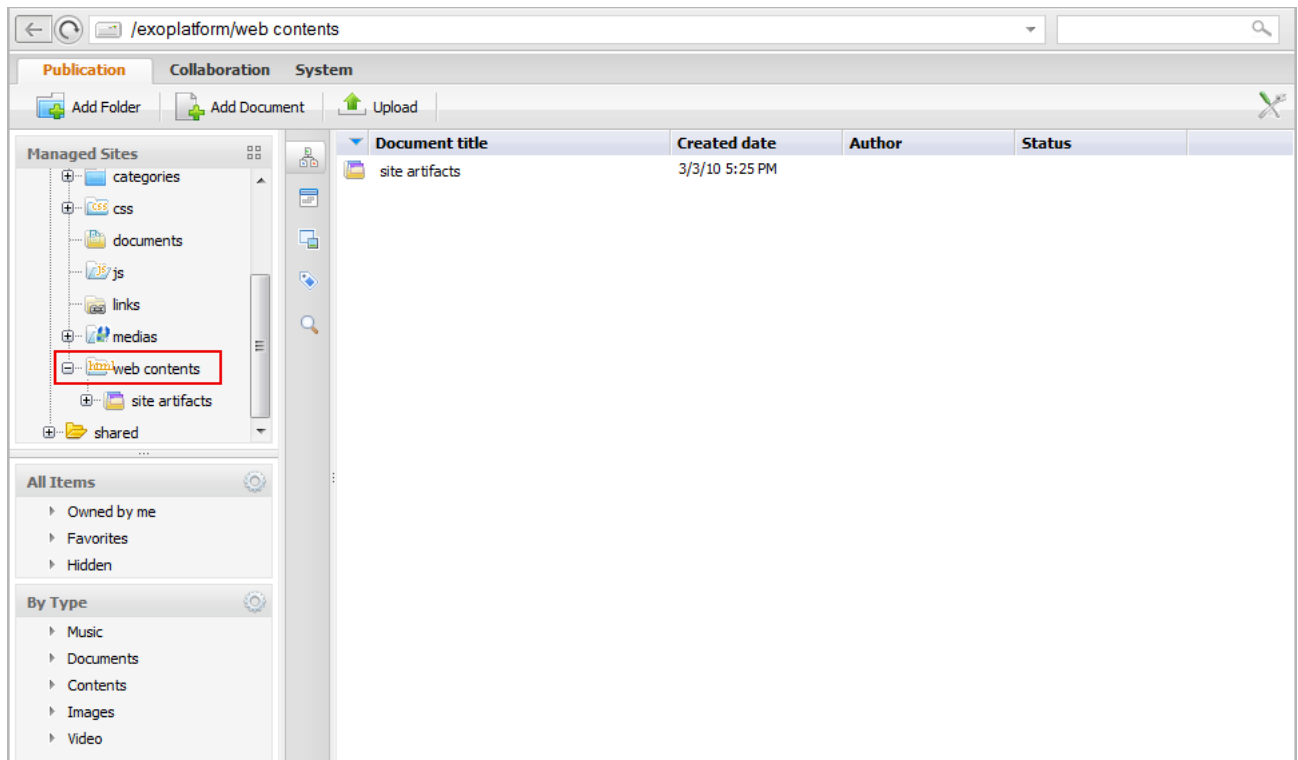
This function is used to add a new web content into a specific site.

Do the following steps:

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


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





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

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

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

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

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

Details:

Select Template:

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

■ The **Main Content** tab includes:

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

■ The **Illustration** tab:


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

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

Details:

|                           |   |
|---------------------------|---|
| <b>Illustration Image</b> | The path to an image that you want to upload into a site. This image will be used like an illustration of that site   |
| <b>Image Type</b>         | The image format that you want to upload to the site. It can be: image/gif; image/png; image/jpg; image/jpeg  |
| <b>Summary</b>            | 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 on the **Browse...** button and then select a specific location.
- Select an image in a list.
- Click the  icon to upload the selected image.

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

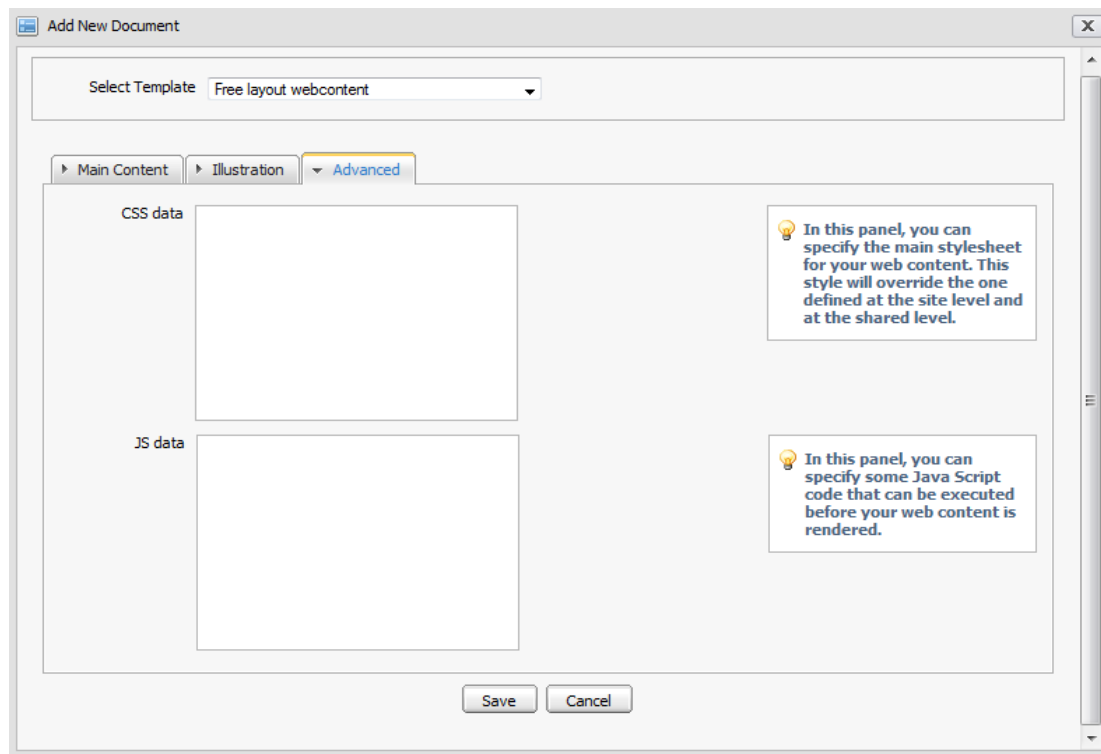


Illustration 41: The Advanced tab in the Add New Document form

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

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

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

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



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


## b) Edit a web content

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

Do the following steps:

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


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

**Step 3:** Click the  **Edit Document** button 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 on the **Save** button.



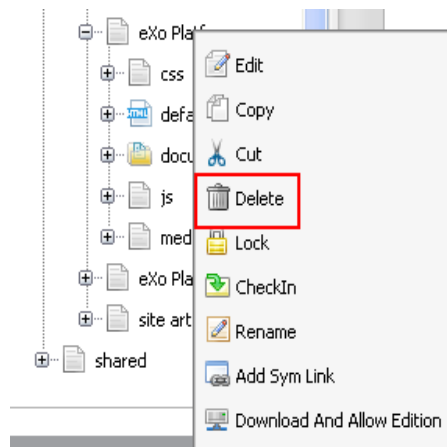
When you click the  **Edit Document** button, the web-content will be auto-locked for your editing.  
After finish editing, the content is back to unlock status. You can manage Locks in the eXo WCM Admin portlet

### c) Delete a web content

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

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

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



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


### d) Publish a web content

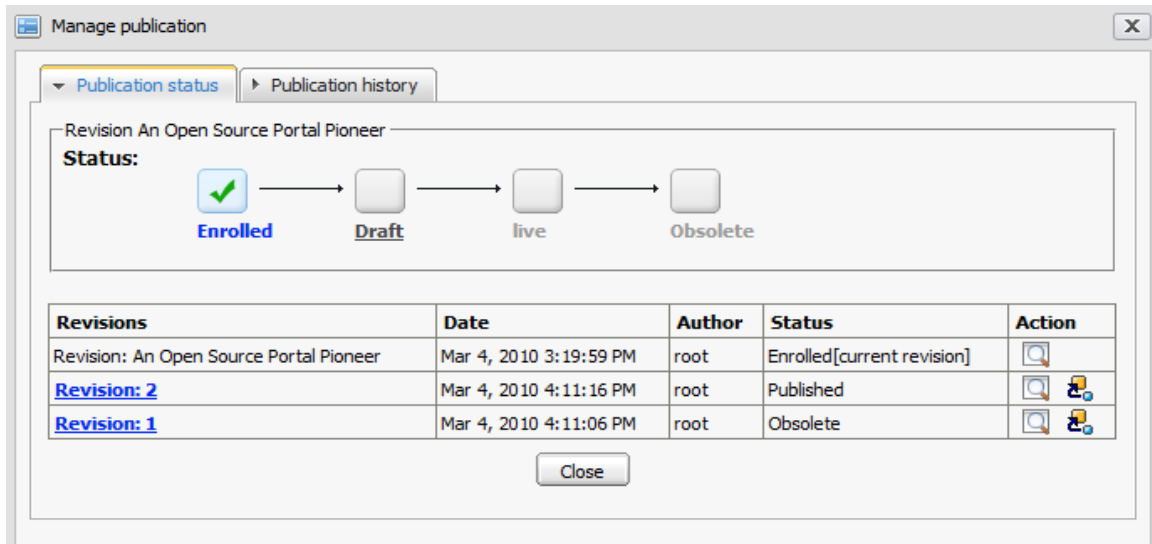
This function helps you publish a web content that you have added to **web content** folder in Sites Explorer.

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

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

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

**Step 3:** Show the Manage publication form by clicking on  Manage Publications on the Action bar:



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] |        |
| <a href="#">Revision: 2</a>             | Mar 4, 2010 4:11:16 PM | root   | Published                  |        |
| <a href="#">Revision: 1</a>             | Mar 4, 2010 4:11:06 PM | root   | Obsolete                   |        |

Close

Illustration 42: The Manage publication form

#### ■ The **Publication status** tab:

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

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

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] |        |
| <a href="#">Revision: 2</a>             | Mar 4, 2010 4:11:16 PM | root   | Published                  |        |
| <a href="#">Revision: 1</a>             | Mar 4, 2010 4:11:06 PM | root   | Obsolete                   |        |

Close

Illustration 43: The Manage Publication form



You only can switch from one status to its next status. For example, your revision is in the **Enrolled** status and you only switch to the **Draft** status by clicking on 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 44: The Publication history of a site

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



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

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

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

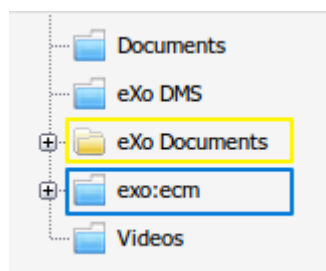
### 3.3.4.3 Manage Folders

#### a) Create a new folder

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

There are two types of folder:

- Content folder
- Document folder



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

#### File and folder types in a folder

##### Content folder

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

##### Document folder


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

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

### Creating content folders

Do as follows:

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

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

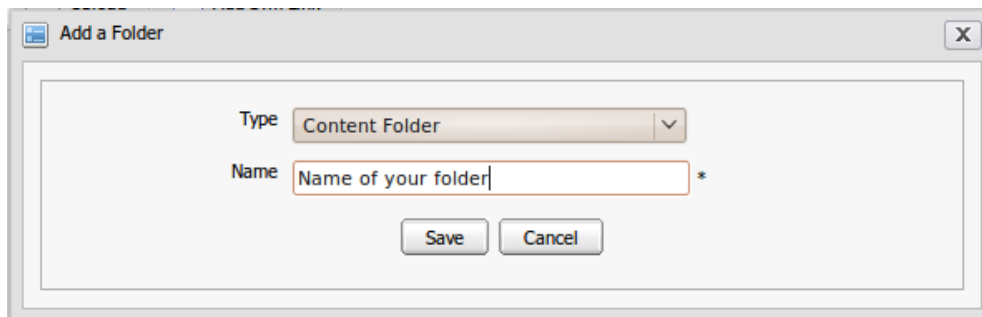


Illustration 45: The Add a Folder form

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

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

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



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

### Creating 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 the  button. The **Add a Folder** form appears:

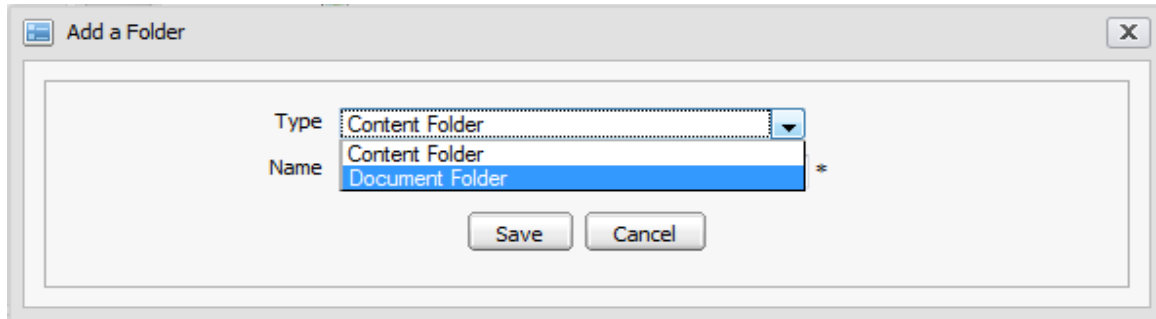

The image shows a dialog box titled "Add a Folder". It has a close button (X) in the top right corner. Inside the dialog, there are two labels: "Type" and "Name". The "Type" label is next to a dropdown menu that currently shows "Content Folder". Below the dropdown, the text "Content Folder" and "Document Folder" are visible, with "Document Folder" highlighted in blue. To the right of the "Name" label, there is an asterisk (\*) indicating it is a required field. At the bottom of the dialog, there are two buttons: "Save" and "Cancel".

Illustration 46: The Add a Folder form

**Step 4:** In the **Add a folder** form, click the  icon 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 input in the **Name** field: (@ # % & \* ( ) " ' : ; [ ] } / !)

**Step 6:** Click the **Save** button 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 the **Save** button, its name will be added an index (e.g: test[2])*

## b) Upload files into folders

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

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

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

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

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

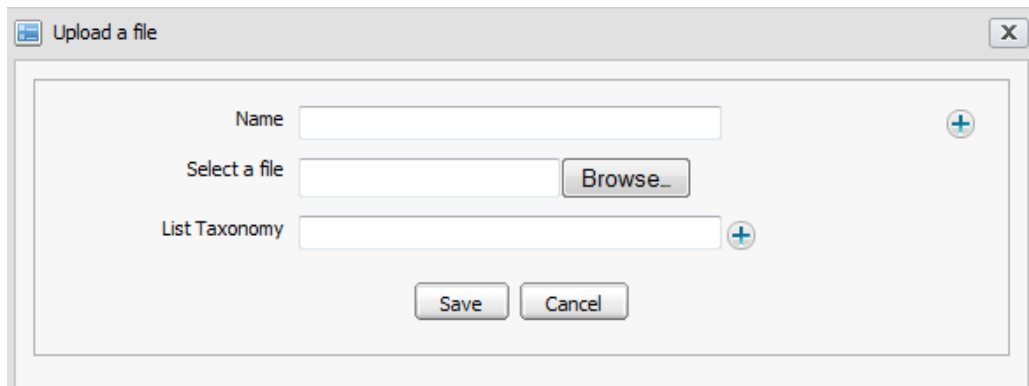




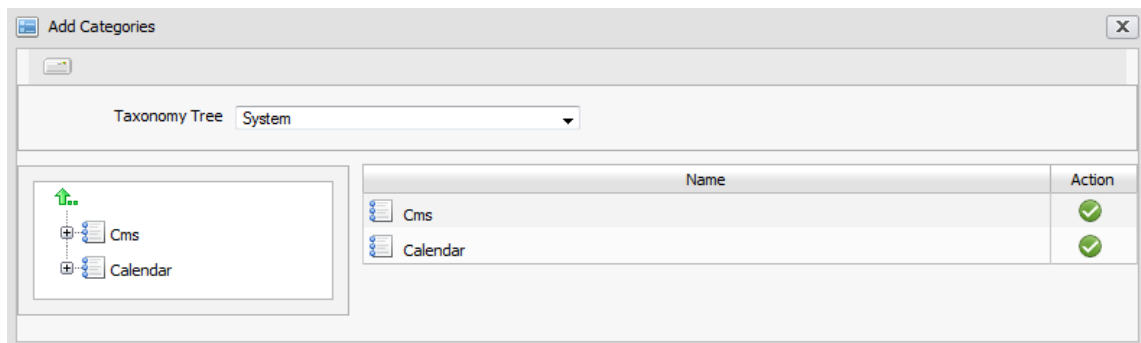
Illustration 47: The Upload a file form



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


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

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

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



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


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

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

Illustration 48: The Add Category form





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

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


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

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

**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.

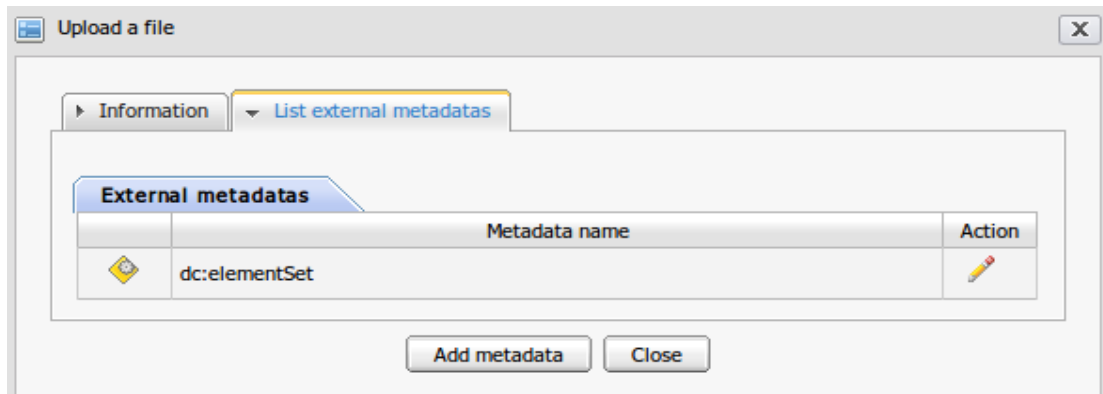


Illustration 49: The Upload a file form

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

**Step 13:** data can be added for the uploaded file. Check the check box and then click the **Add** button or the **Cancel** button to quit without adding anything.

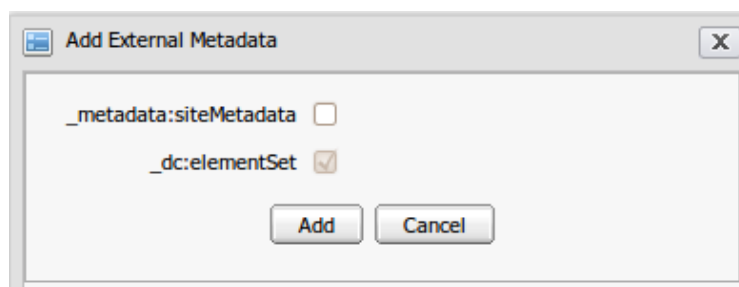
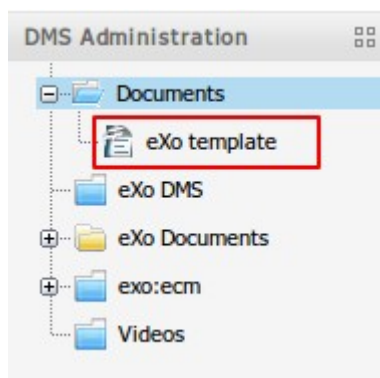


Illustration 50: The Add External Metadata form

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


**Step 15:** Click the **Close** button 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 the  icon to open more

forms to upload more files:

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

### c) Add Sym Link

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



Illustration 51: The Sym Link Manager form

Details:

|                       |                    |
|-----------------------|--------------------|
| <b>Path Node</b>      | The path of a link |
| <b>Sym Link Name:</b> | 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.


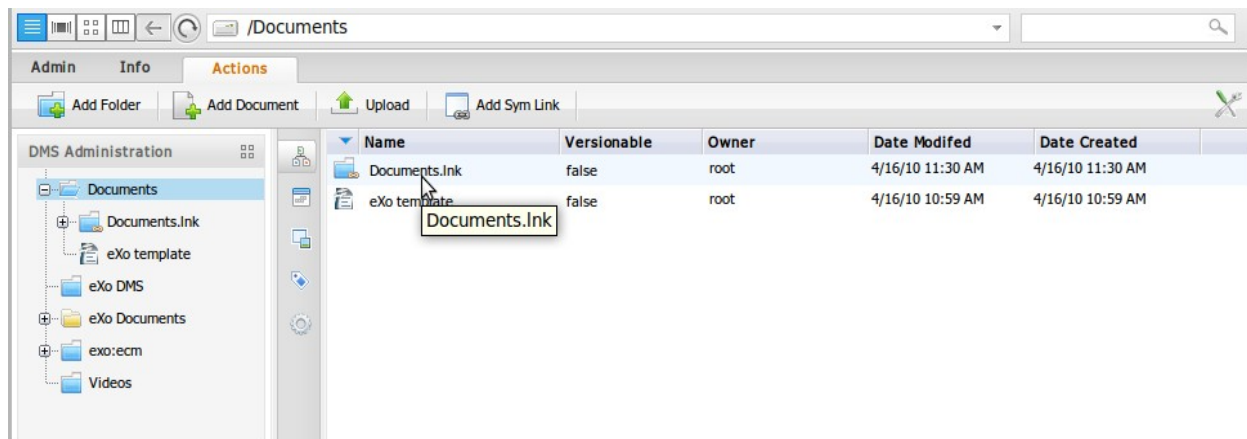
**Step 6** Click the  icon in the row of the node that you want to add, the path of that node will appear in the **Path Node** field and the name of the node is set by the name of the selected node. You can also edit this name.

Illustration 52: The Sym Link Manager form

**Step 7** Click the **Save** button to add a sym link.



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

#### d) Copy/Paste Folders

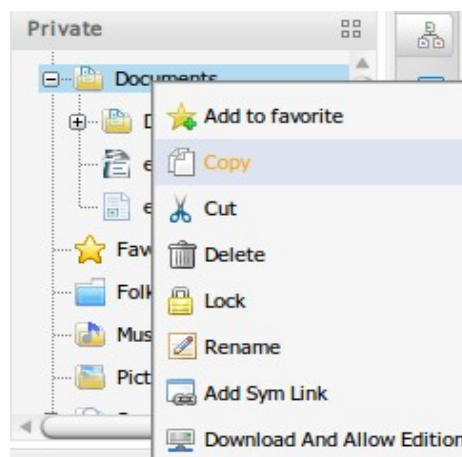
There are two ways to copy folders to other places:

**The 1<sup>st</sup> way:** Copying/Pasting folders from the menu

Do as follows:

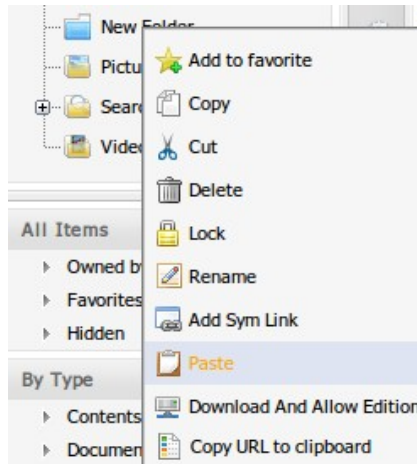
**Step 1:** Select a folder that you want to copy on the left or right panel.

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



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

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



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

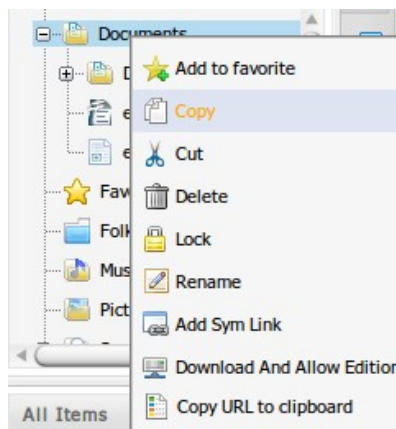


- You only can take the **Copy** action if you have a right on the source node
- You only can take the **Paste** action if you have a right on the destination node
- If the destination node has the same name with the copied node, after being pasted, the copy node will be added an index with its name.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

### The 2nd way: Copying/Pasting folders from the Clipboard

Do as follows:

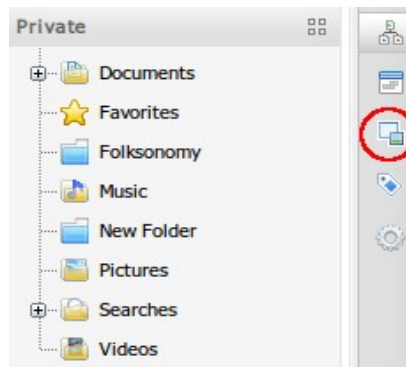
**Step 1:** Right-click a folder that you want to copy and select the **Copy** item in the



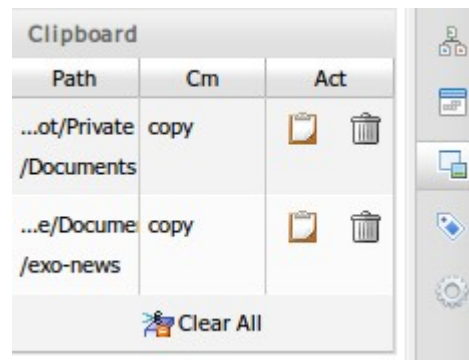
menu:

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

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



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



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

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

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

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



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

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

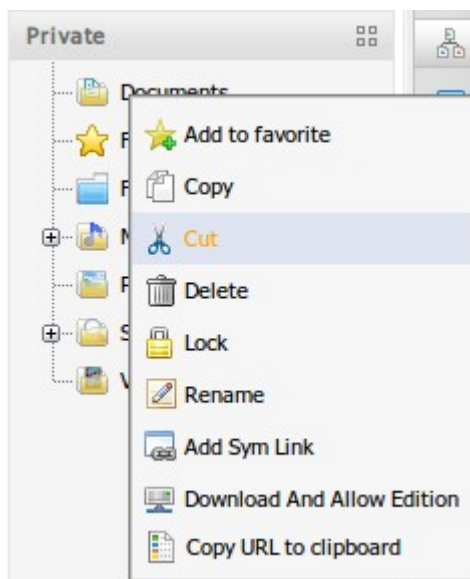
### e) Cut/Paste folders

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

#### The 1<sup>st</sup> way: Cutting/Pasting folders from the menu

Do as follows:

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



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

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



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

#### The 2<sup>nd</sup> way: Cutting/Pasting folders from the Clipboard

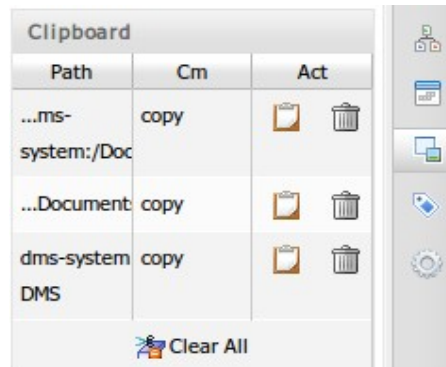
Do as follows:


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


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

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

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



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

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

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



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

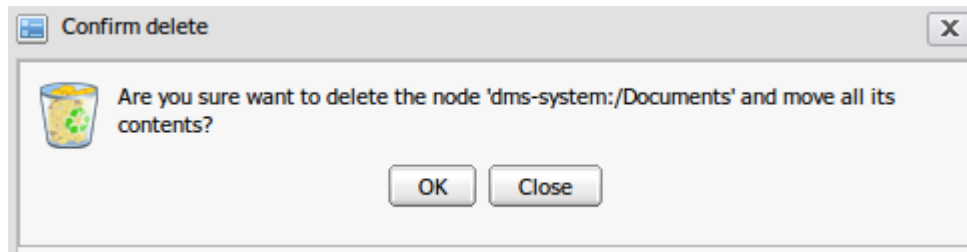
## f) Delete folders

This function helps you remove folders easily.

Do as follows:

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

A confirmation message appears:



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




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

### g) Drag and drop folders

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

Do as follows:

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

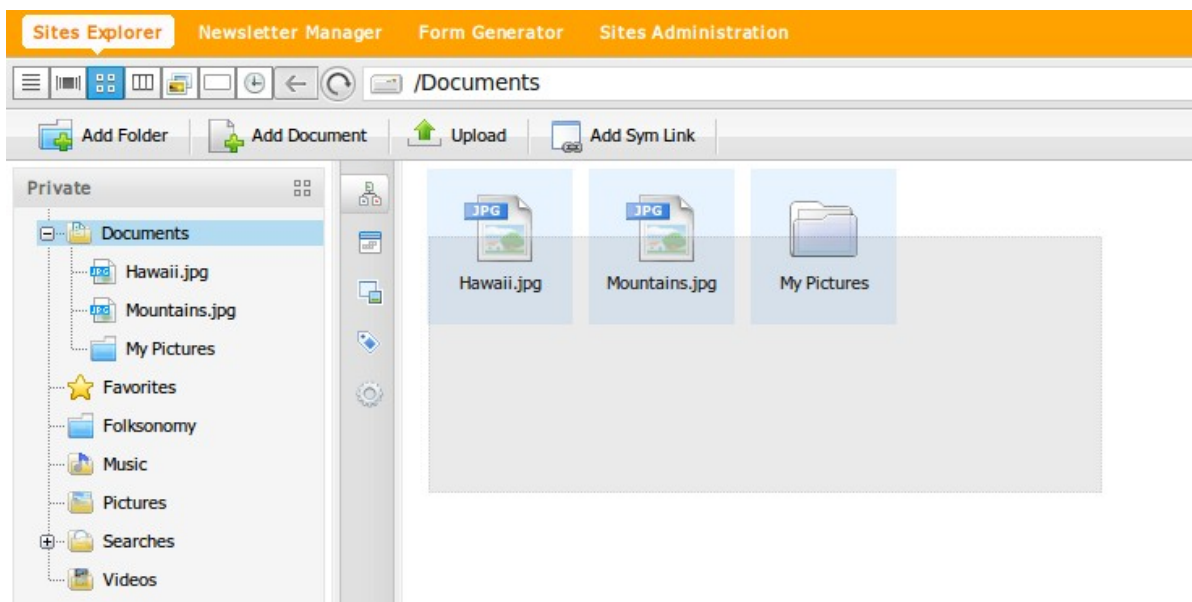


Illustration 53: Chose the folder you want to move on the right panel

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



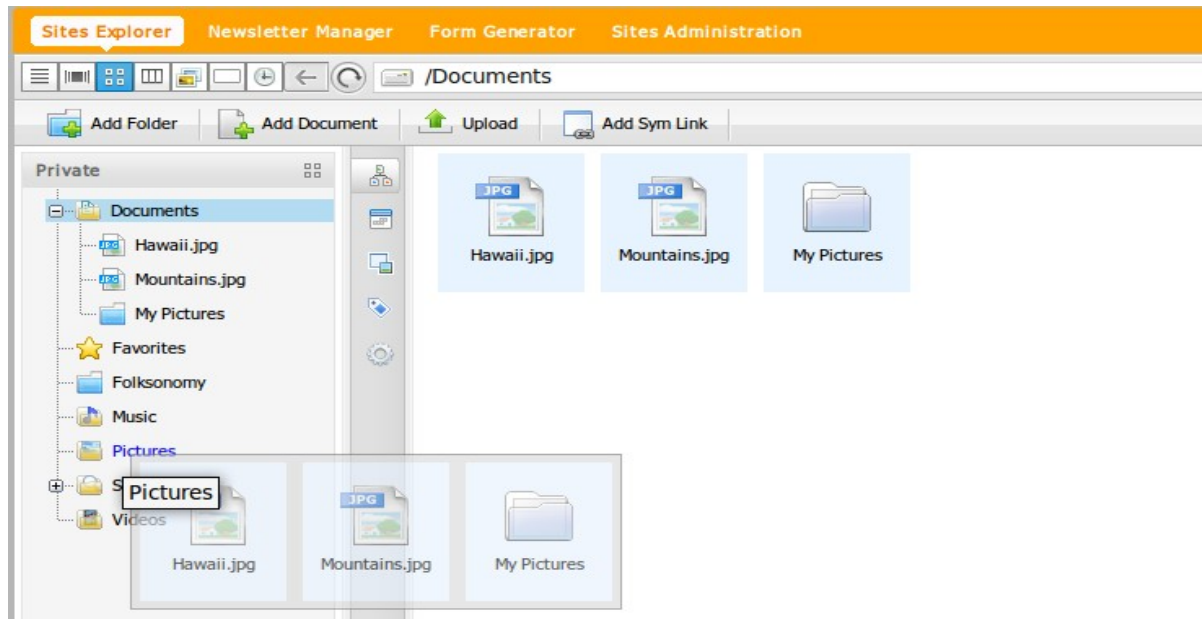


Illustration 54: Drag folder(s) to the new location in the left panel

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

## h) Lock/Unlock folders

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

### Lock folders

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



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



## Unlock folders

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

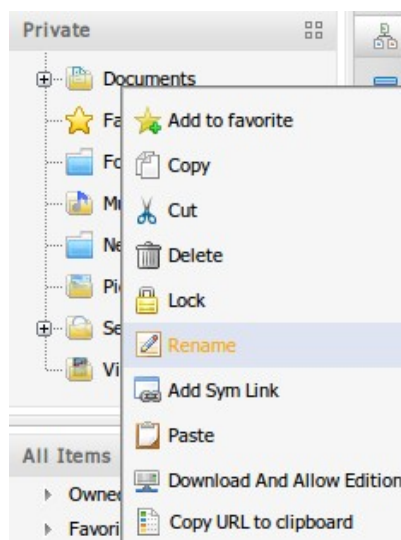
The locked folder will be unlocked and thus others can take actions on it.

### i) Rename folders

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

Do as follows:

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



The **Rename** form will appear:

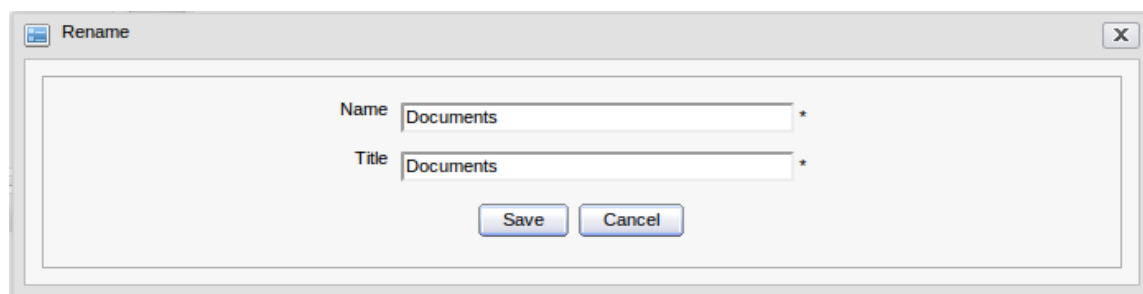


Illustration 55: The Rename form

(\*): *required*

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

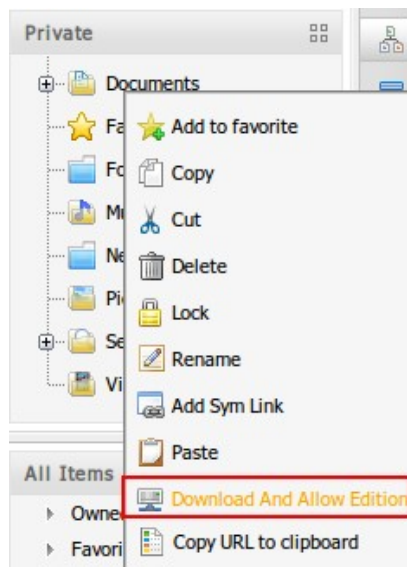
**Step 3:** Complete renaming a folder by clicking the **Save** button.

## j) WebDAV View

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

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

Right click a node (from left or right panel) then select the **Download and Allow Edition**



in the menu:

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

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

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



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

### k) Overload Thumbnails

You can easily overload a thumbnail image for a folder.

Do the following steps:

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

**Step 2:** Click the  Overload thumbnail on the Action bar:

The **Add thumbnail image** form appears:

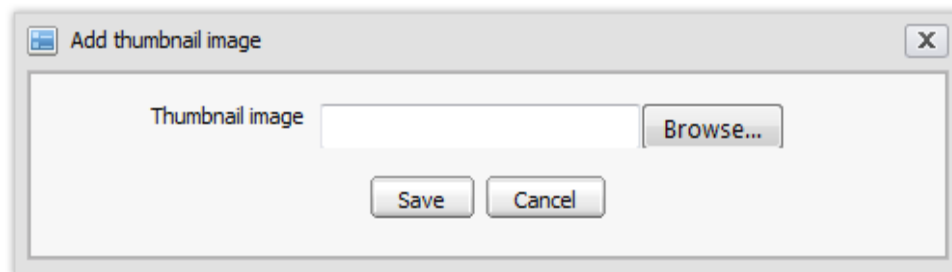
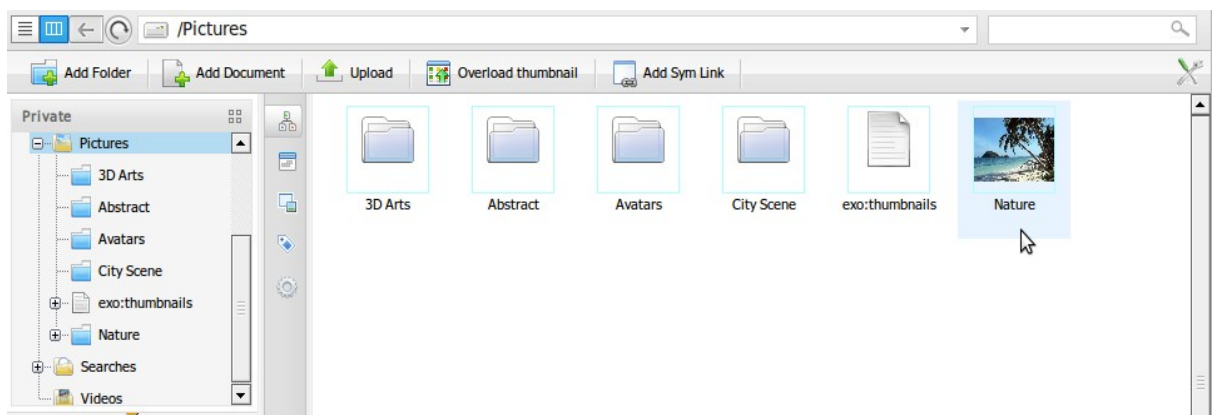


Illustration 56: The Add thumbnail image form

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

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



### 3.3.4.4 Manage Documents in Sites Explorer

#### a) Create a new document

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

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

|                        | File | Article | Podcast | Sample node | File Plan | Kofax document | Content folder | Document folder |
|------------------------|------|---------|---------|-------------|-----------|----------------|----------------|-----------------|
| <b>File</b>            | o    | o       | o       | o           | o         | o              | o              | o               |
| <b>Article</b>         | o    | x       | o       | x           | x         | o              | o              | x               |
| <b>Podcast</b>         | o    | o       | o       | o           | o         | o              | o              | o               |
| <b>Sample node</b>     | o    | x       | o       | x           | x         | o              | o              | x               |
| <b>File Plan</b>       | o    | x       | o       | x           | o         | o              | o              | o               |
| <b>Kofax</b>           | o    | o       | o       | o           | o         | o              | o              | x               |
| <b>Uploaded file</b>   | o    | o       | o       | o           | o         | o              | o              | o               |
| <b>Content folder</b>  | o    | o       | o       | o           | x         | o              | o              | x               |
| <b>Document folder</b> | o    | x       | o       | x           | o         | o              | o              | o               |

#### Note:

“o” : The corresponding document can be added into

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

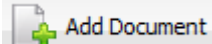
Follow the horizontal, you will know what the node can be added into

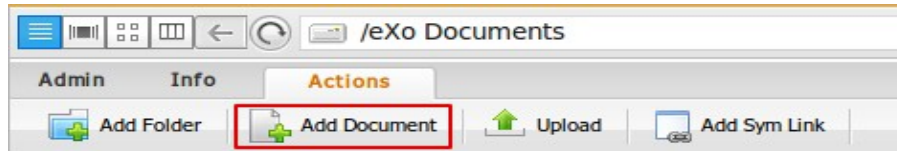
Follow the vertical, you will know what the node can include

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

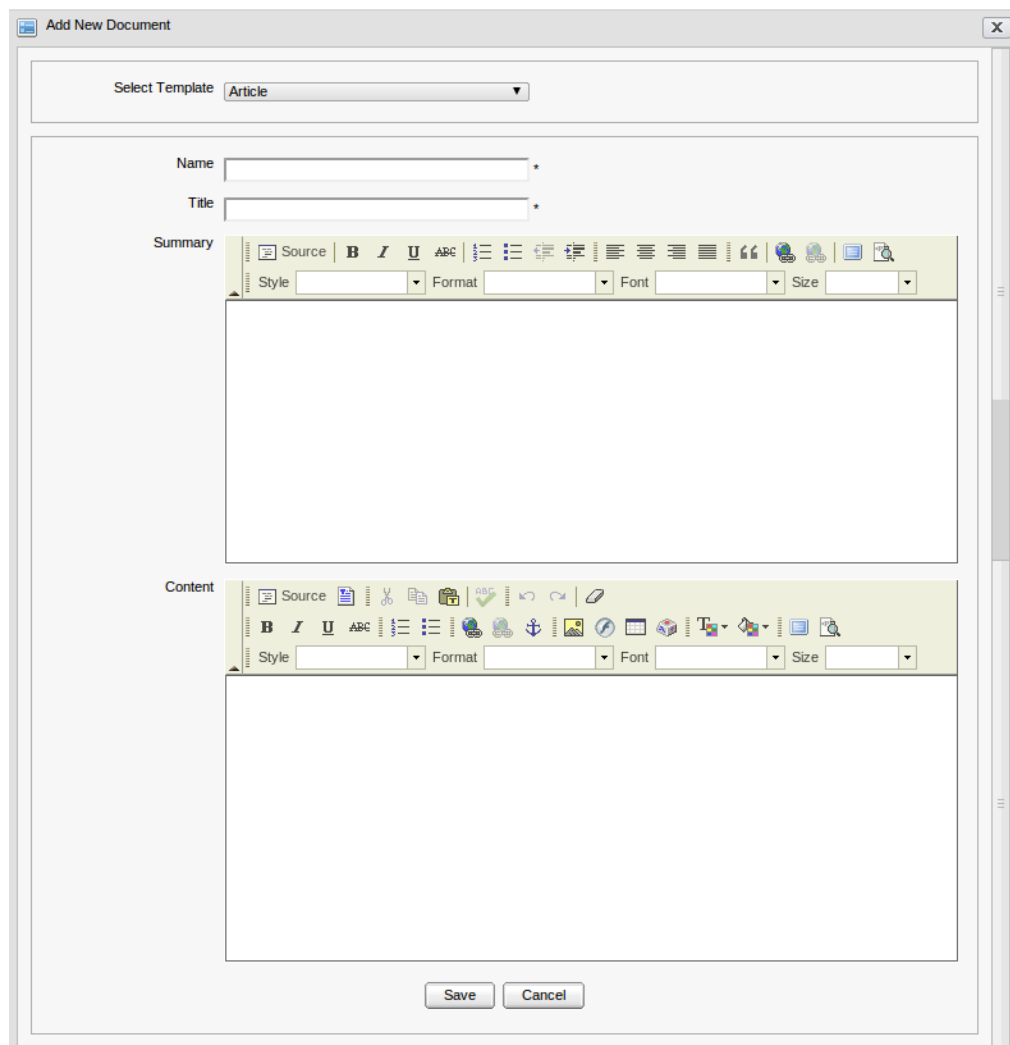
- ✓ To create a new document, do the following steps:

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

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



The **Add New Document** form will appear:

The 'Add New Document' form is displayed in a window. It features a 'Select Template' dropdown menu with 'Article' selected. Below this are input fields for 'Name' and 'Title', each followed by an asterisk. The form is divided into two main sections: 'Summary' and 'Content'. Each section has a rich text editor toolbar with options for Source, Bold, Italic, Underline, ABC, and various alignment and list tools. Below the toolbars are large text areas for entering the content. At the bottom of the form are 'Save' and 'Cancel' buttons.


**Illustration 57: Add New Document form**

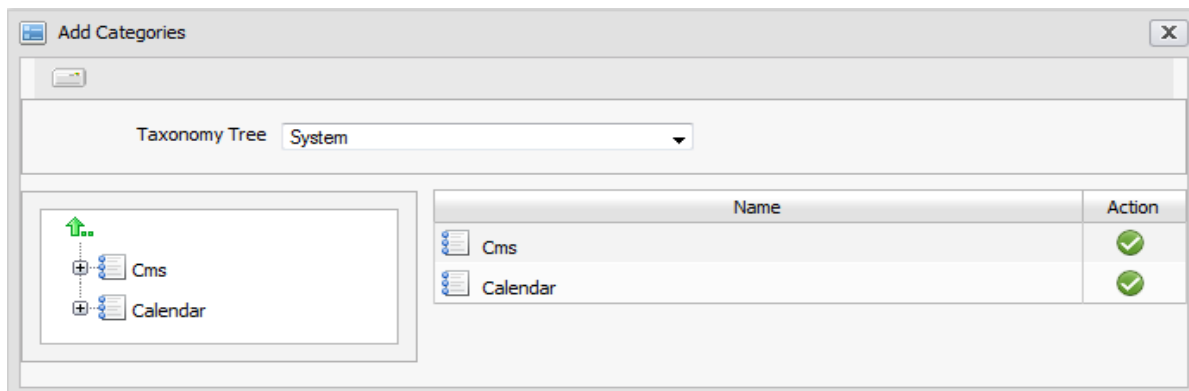
**Step 3:** Select the document type (template) that you want to create from the drop down list (Article is selected by default).

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

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

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

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







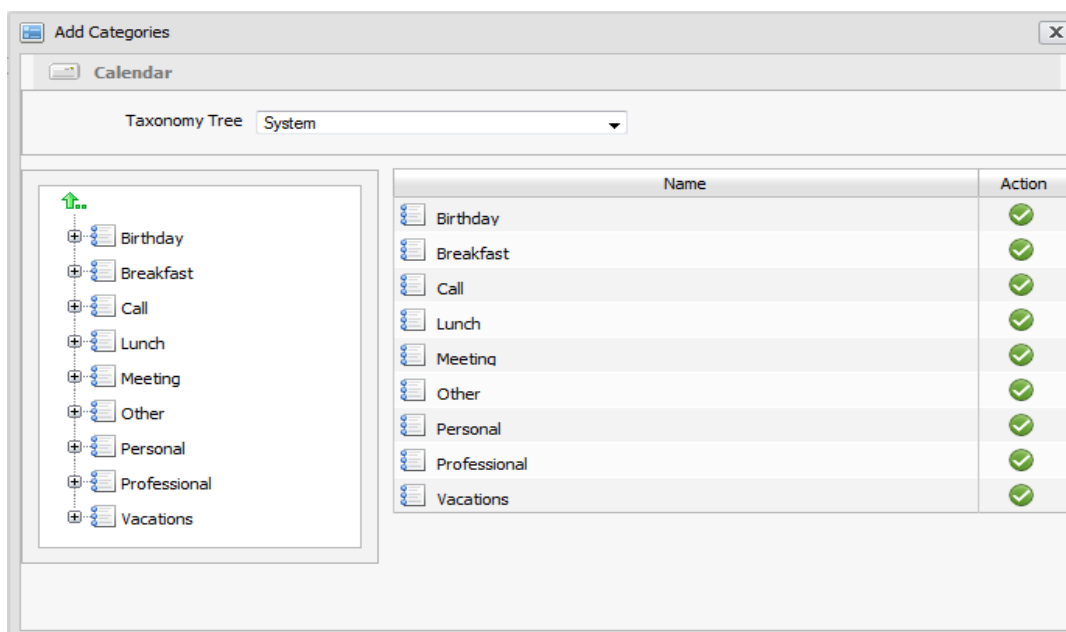









| Name     | Action  |
|----------|---|
| Cms      |  |
| Calendar |  |

Illustration 58: The Add Categories form

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



| Name         | Action  |
|--------------|---|
| Birthday     |  |
| Breakfast    |  |
| Call         |  |
| Lunch        |  |
| Meeting      |  |
| Other        |  |
| Personal     |  |
| Professional |  |
| Vacations    |  |



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

Click the  icon to delete category in the Add document form

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

## Create a new File document

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

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

Illustration 59: 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.

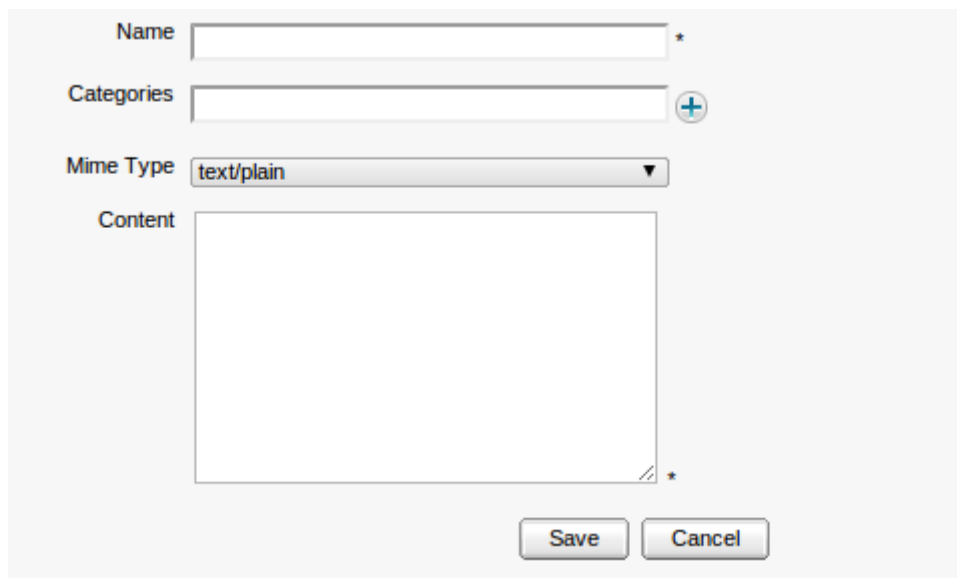
- **text/html:**

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

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

- Text/plain:

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



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

**Step 5:** After inputting all required fields, click the **Save** button 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:

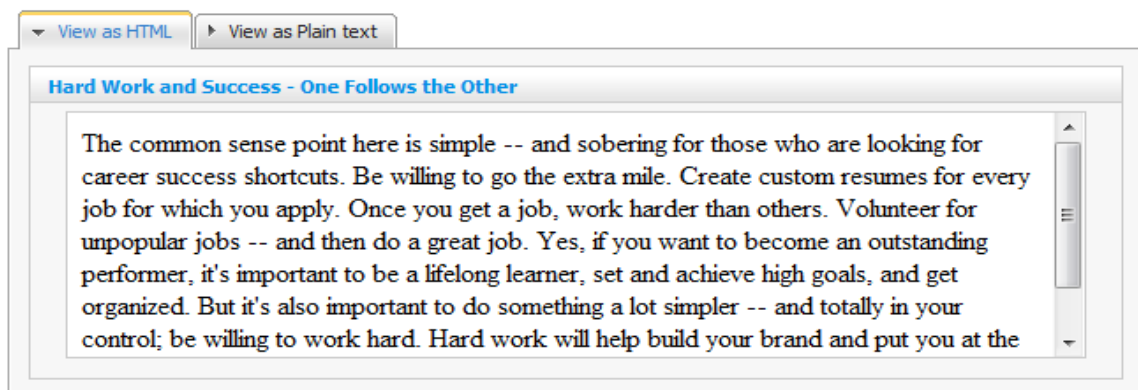


Illustration 60: The View as HTML tab



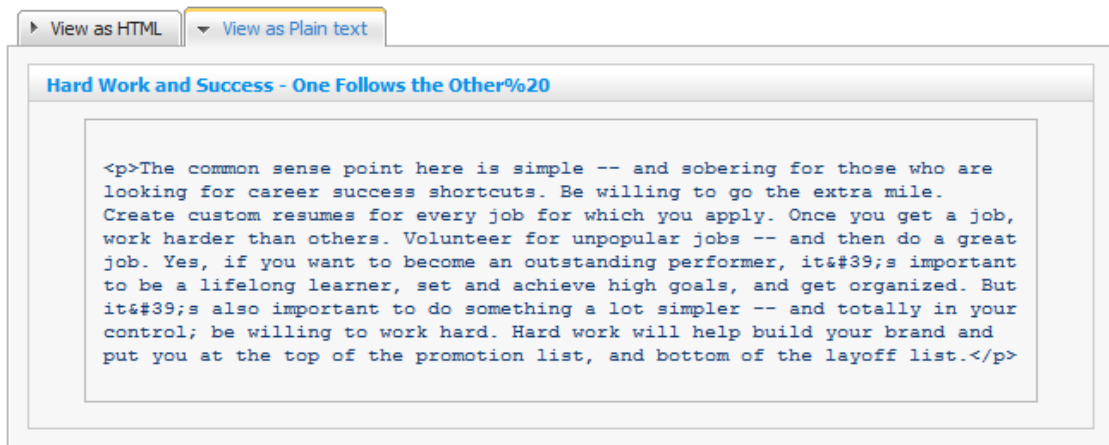


Illustration 61: The View as Plain text tab

## 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

Source B I U ABC [List Icons] [Link Icon] [Image Icon] [Table Icon] [Media Icon]

Style [Dropdown] Format [Dropdown] Font [Dropdown] Size [Dropdown]

Content

Source [List Icons] [Link Icon] [Image Icon] [Table Icon] [Media Icon] B I U ABC [List Icons] [Link Icon] [Image Icon] [Table Icon] [Media Icon]

Style [Dropdown] Format [Dropdown] Font [Dropdown] Size [Dropdown]

Save Cancel

Illustration 62: 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 the **Save** button to accept the inputted values or **Cancel** to quit.

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

Illustration 63: 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.

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

The screenshot shows the 'Add New Document' window. At the top, 'Select Template' is set to 'Podcast'. The form contains the following fields:

- Name: Text input with an asterisk (\*) indicating it is required.
- Categories: Text input with a plus icon (+) for adding categories.
- Title: Text input.
- Link: Text input with an asterisk (\*) indicating it is required.
- Author: Text input.
- Explicit: Dropdown menu currently set to 'No'.
- Category: Text input.
- Keyword: Text input.
- Publish Date: Text input showing '05/19/2010 08:55:04'.
- Description: Large text area.
- Upload File: 'Choose File' button and 'No file chosen' text.
- Mime Type: Dropdown menu currently set to 'audio/mp3'. A tooltip is visible showing the list of options: audio/mp3, audio/mp3, audio/x-m4a, video/mpeg, video/x-m4v, and video/quicktime.
- Length: Text input.


At the bottom right, there are 'Save' and 'Cancel' buttons.

Illustration 64: The Add new Podcast document form

(\*): *Required*

Details:

|                     |  |
|---------------------|--|
| <b>Name</b>         | The name of a document. This field is required. Some special characters are not allowed to input in the <b>Name</b> field(@ # % & * ( ) " ' : ; [ ] { } / !)   |
| <b>Title</b>        | The title of a document  |
| <b>Categories</b>   | Categories of a document   |
| <b>Link</b>         | The link to the source path of the uploaded media file. This field is required   |
| <b>Author</b>       | The author of the uploaded media file  |
| <b>Explicit</b>     | It is used to indicate whether or not your podcast contains an explicit material. There are two option: <ul style="list-style-type: none"><li>• Yes: an "explicit" parental advisory graphic will appear next to your podcast artwork</li><li>• No: you see no indicator – bank is default advisory type</li></ul> |
| <b>Category</b>     | The category of the uploaded media file, example: music, film, short clip, etc   |
| <b>Keyword</b>      | Keyword allows you to search your podcast files more quickly. You can use commas to separate between keywords  |
| <b>Publish date</b> | The date when an episode was released  |
| <b>Description</b>  | Information about the uploaded media file  |
| <b>Mime type</b>    | The type of the uploaded media file  |
| <b>Length</b>       | The length of the uploaded media file  |

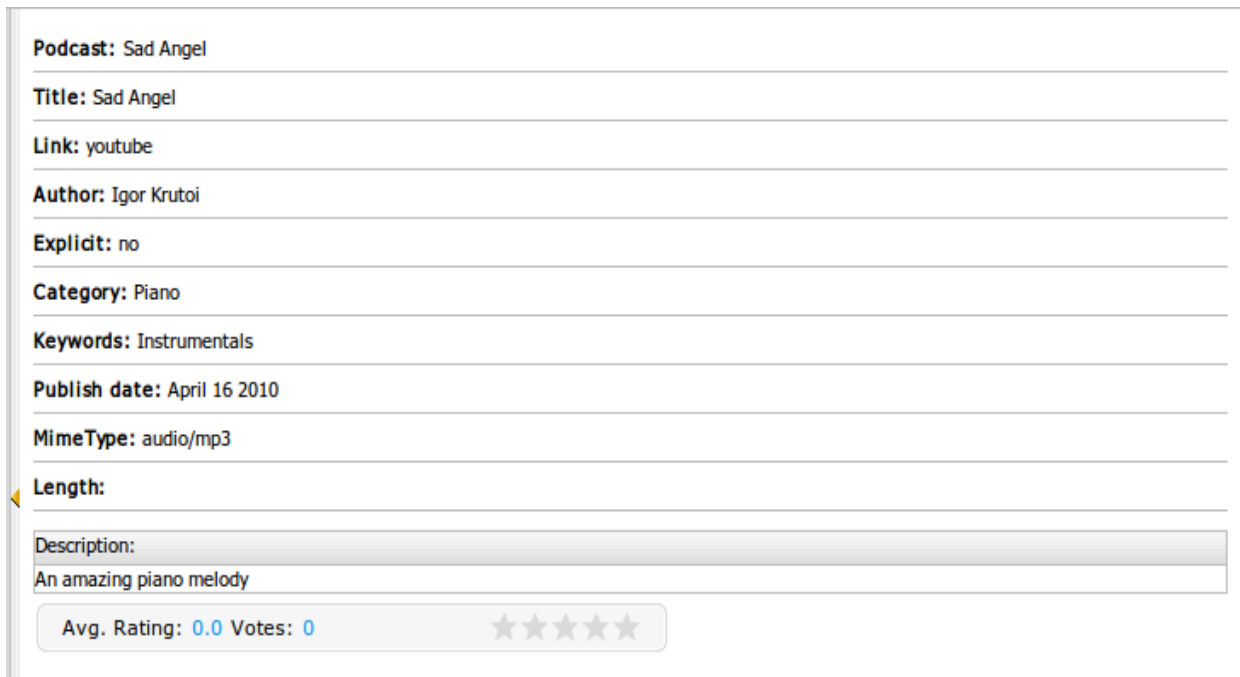
**Step 2:** Input values for fields. To upload a media file, click the **Browse...** button and select the media file from your machine. After that, click the  icon next to the **Browse...** button

**Step 3:** Click the **Save** button to finish or the **Cancel** button 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:



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

Illustration 65: 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 66: 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  |   |
| <b>Description</b><br>One of the best coffeshop in Hanoi  | <b>Image</b><br>   |
| <b>Summary</b><br>A funky new cafe that can be a challenge for some to find.                                  | <b>Content</b><br>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. |
| <b>Relations</b><br>- Best spots in Hanoi .odt  | <b>Attachments</b><br>- Hanoi tourguide.png                                |
| Avg. Rating: 0.0 Votes: 0  |   |

Illustration 67: The screen of a Sample node

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

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

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

## Create a new File Plan

Do as follows:

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

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

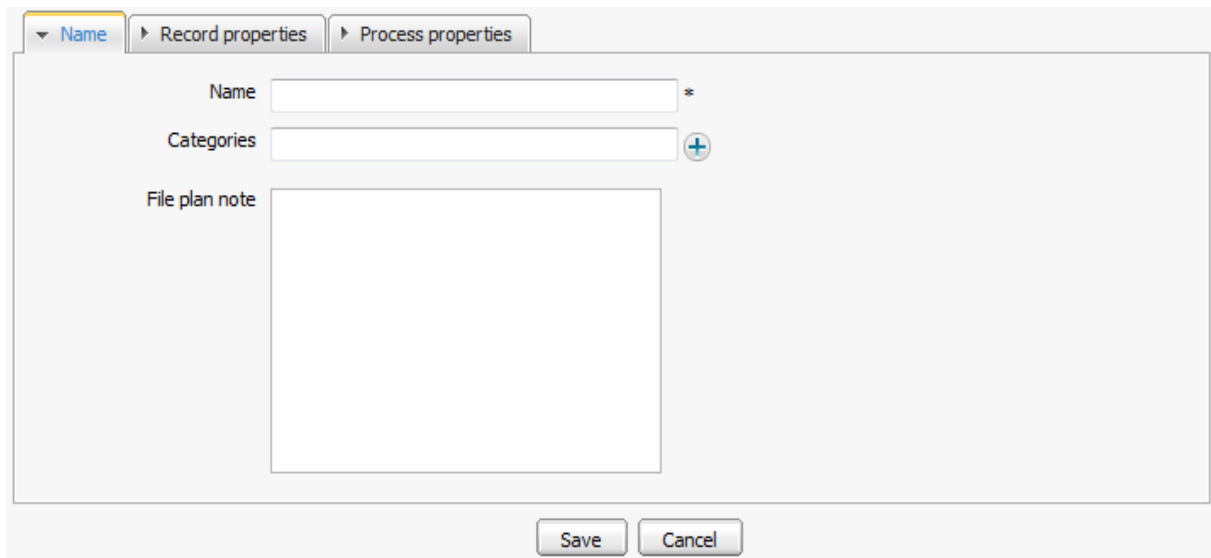



Illustration 68: The Add new File Plan form

Details:

(\*) *required*

### ■ The **Name** Tab:

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



■ The **Record properties** Tab:

Illustration 69: The Record properties tab

Details:

|   |  |
|---|--|
| <b>Record category identifier</b>       | 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 |
| <b>Disposition authority</b>            | A reference number to the regulations that govern the disposition  |
| <b>Permanent record indicator</b>       | A type of record indicators which should never be deleted  |
| <b>Disposition instructions</b>         | A readable guidelines on how the records associated with the file plan will be handled   |
| <b>Contains records folder</b>          | The confirmation is about whether the records folder is contained or not   |
| <b>Default media type</b>               | 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         |
| <b>Default marking list</b>             | Handling and classification information that are printed at the bottom of the record, such as UNCLASSIFIED or NOCONTRACT   |
| <b>Default originating organization</b> | 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   |
| <b>Vital record indicator</b>     | This flag is to allow whether tracking or reminding you of the record as essential or not |
| <b>Vital record review period</b> | 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 their current values:

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

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

Illustration 70: 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 the **Save** button to accept or the **Cancel** to quit.

After being created, 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 71: 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:

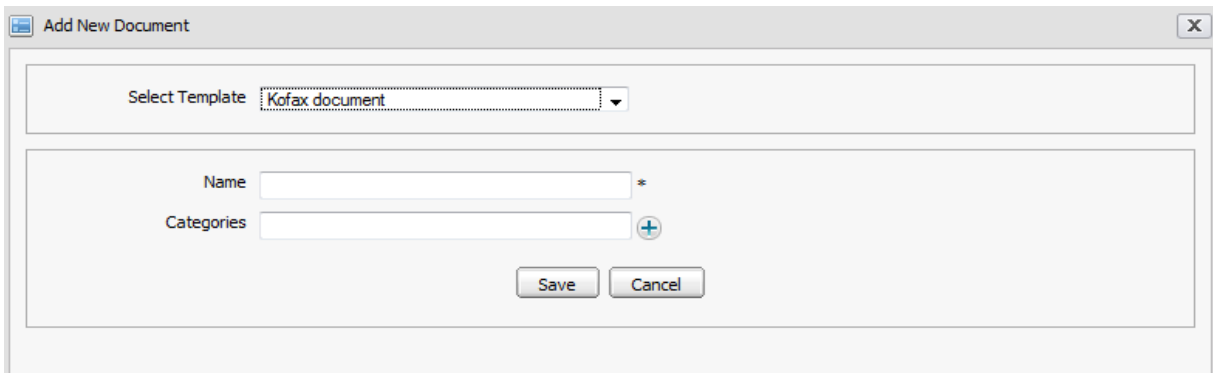


Illustration 72: The Add New Document form with the Kofax template

(\*): 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 the  icon.

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

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

The screenshot shows the 'Document view' tab selected. It displays a form with the following fields:

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

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

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

The screenshot shows the 'Document view' tab selected. It displays a form with the following fields:

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

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

Illustration 73: The Kofax Document view tab

## Create new Event

The screenshot shows the 'File view' tab selected. It displays a list of files:



|   |   |
|---|---|
|  |  |
| BC config.gif   | system guide.pdf  |

Illustration 74: The Kofax File view

Do as follows:

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

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

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 75: 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** button to finish or **Cancel** button 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:

Overview News **Events** Newsletters Contact Us

All | Events RSS Feed

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

[readmore](#)

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

[View Larger Map](#)

**Attachments :**  
 doc-news1

Avg. Rating: 0.0 Votes: 0

## b) Attach files to a document

Do as follows:

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

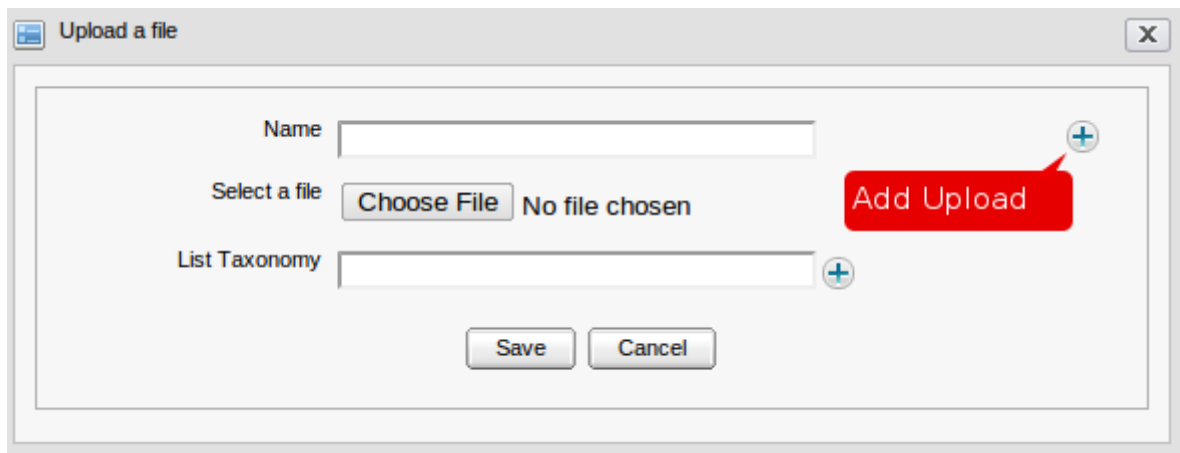
Admin Info **2 Actions** **3**

Add Folder Add Document Upload Add Sym Link


Private Documents

| Name                     | Versionable | Owner | Date Modified    | Date Created     |
|--------------------------|-------------|-------|------------------|------------------|
| big events-JUNE          | true        | john  | 5/19/10 10:40 AM | 5/19/10 10:40 AM |
| New KOFAX                | true        | john  | 5/19/10 10:37 AM | 5/19/10 10:37 AM |
| Best spots in Hanoi .odt | true        | john  | 5/19/10 10:04 AM | 5/19/10 10:04 AM |
| Sample node <b>1</b>     | true        | john  | 5/19/10 9:55 AM  | 5/19/10 9:54 AM  |
| A File                   | true        | john  | 5/18/10 5:56 PM  | 5/18/10 5:56 PM  |
| nde                      | true        | john  | 5/18/10 4:47 PM  | 5/18/10 4:47 PM  |
| KOre                     | true        | john  | 5/18/10 4:17 PM  | 5/18/10 4:17 PM  |
| eXo- article             | true        | john  | 5/19/10 10:46 AM | 5/18/10 3:25 PM  |

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



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

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

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

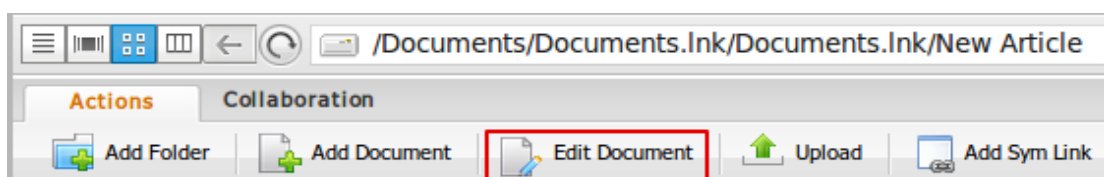
### c) Edit documents

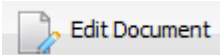
There are two ways to edit a document:

Do as one of follows:

**The 1<sup>st</sup> ways:** Select the document that you want to edit on the left panel.

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



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

**The 2<sup>nd</sup> way:** Select a folder that contains the document you want to edit

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

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

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



#### d) Delete documents

Do as follows:

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

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

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

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



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

#### e) Copy/Paste documents

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

##### The 1<sup>st</sup> way: Copying/Pasting documents from the menu

Do as follows:

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

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

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

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



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

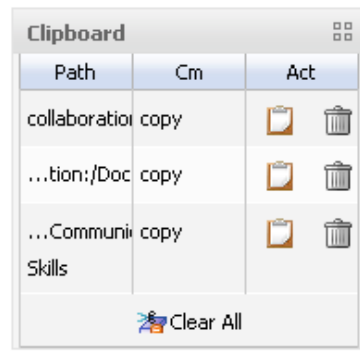
##### The 2nd way: Copying/pasting folders from the Clipboard

Do as follows:

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

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

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



**Step 4:** Click 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:** You can also click the **Clear All** link to delete all waiting statements in the list.

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



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

## f) Cut/Paste documents

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

### The 1<sup>st</sup> way: Cutting/Pasting documents from the menu

Do as follows:

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

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

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

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

**The 2<sup>nd</sup> way: Cutting/Pasting documents from the Clipboard**

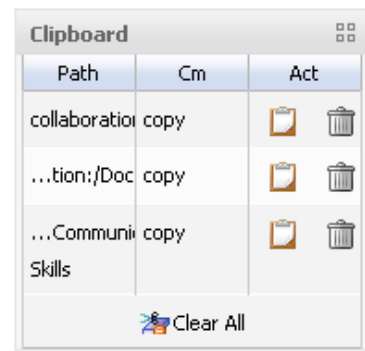
Do as follows:


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


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

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

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



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

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

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

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




- You can do the **Cut/Paste** action only when you have the right on the source/destination node.
- If the destination node contains a same named node, after being pasted, the cut node will be added an index after its name.
- If there are more than one **Copy/Cut** action on one folder, only the most recent action is listed in the Clipboard
- After performing the **Paste** action, the waiting cut statement will be removed automatically.
- If you delete the cut waiting statement from the Clipboard before paste, the **Paste** action in the right-click menu also be deleted.

**g) Drag and Drop documents**

This function allows you to move a document from a specific location to another one by using

the drag and drop feature.

Do as follows:

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

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

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

## h) Lock/Unlock documents

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

### Lock document

To lock document, do as follows:

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

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

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



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

### Unlocking documents

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

## i) Rename documents

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

To rename document, do as follows:

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

The **Rename** form will appear:

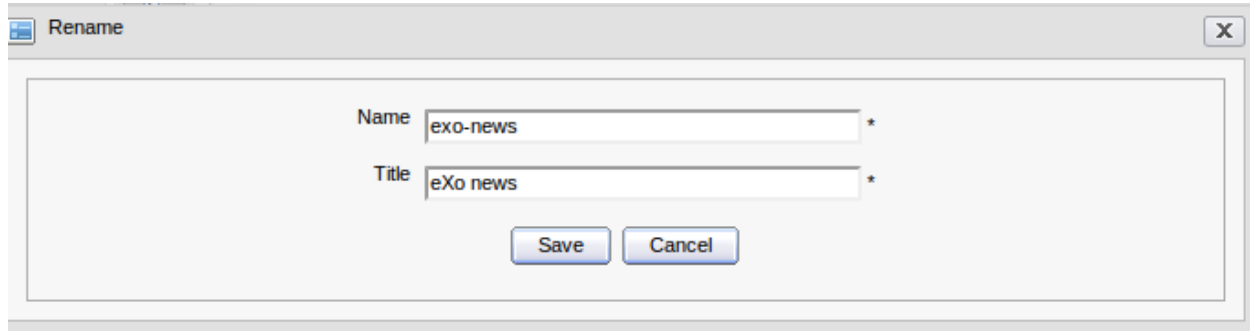


Illustration 76: The Rename form

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

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



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

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

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

## j) Add Sym Link

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

To add Sym link, do as follows:

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

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

**Step 3:** The selected document will be added a sym link immediately. You now can click the sym link to view its content.

## k) View WebDAV

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

To view nodes in WebDAV, do as follows:

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

**Step 2:** Right click 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, etc
- *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, etc
- *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, etc
- *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, etc



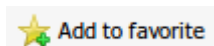
*With documents like Podcast or office document, you can not view the content directly, you must download to your computer then choose the suitable application to view the content*

## I) Add to favorite

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

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

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

 from the menu.

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

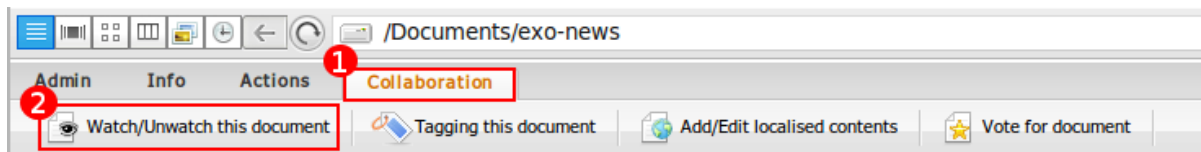
## m) Watch/Unwatch documents

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

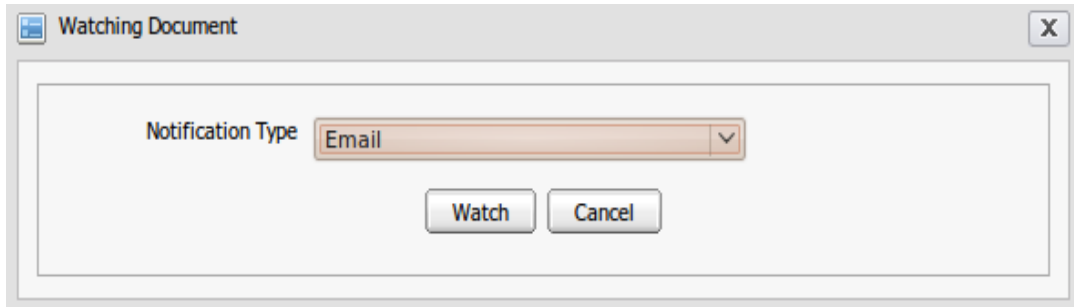
- ✓ To start receiving an email notification do as follows:


**Step 1:** Select the document.

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



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

A screenshot of the 'Watching Document' dialog box. It has a title bar with a close button (X). Inside, there's a 'Notification Type' dropdown menu set to '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 the  button again. There will be a message informing that you've just unwatch that document.


## n) Add tags for documents

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

### Adding a new tag for a document

Do as follows:

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

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

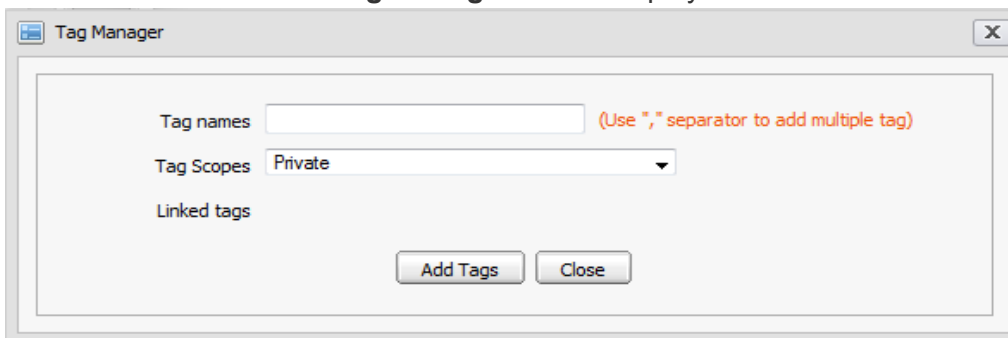
A screenshot of the 'Tag Manager' dialog box. It has a title bar with a close button (X). Inside, there's a 'Tag names' text input field with a hint '(Use "," separator to add multiple tag)'. Below it is a 'Tag Scopes' dropdown menu set to 'Private'. At the bottom, there's a 'Linked tags' section and two buttons: 'Add Tags' and 'Close'.

Illustration 77: The Tag Manager form

|                    |  |
|--------------------|--|
| <b>Tag names</b>   | The tag names that users want to add tags for documents  |
| <b>Tag Scopes</b>  | 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 ) |
| <b>Linked tags</b> | To list all tags of a document after you click the <b>Add Tags</b> 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 the **Add Tags** button to accept or the **Close** to quit. Only you can see this tag in this document.

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



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


*You can add multi-tags for the same documents.*

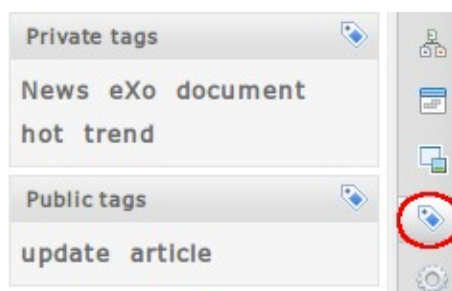
*You can add multi-documents with the same named tag.*

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

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

## o) Use created tags

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




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

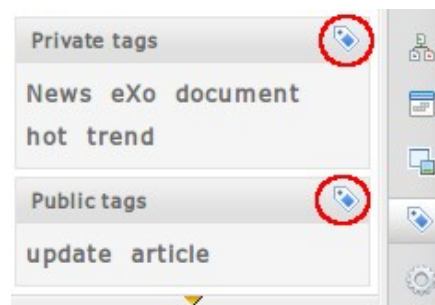


Each tag is also like a link used list all documents that it is added, click a tag name, documents list will be displayed in the right panel.

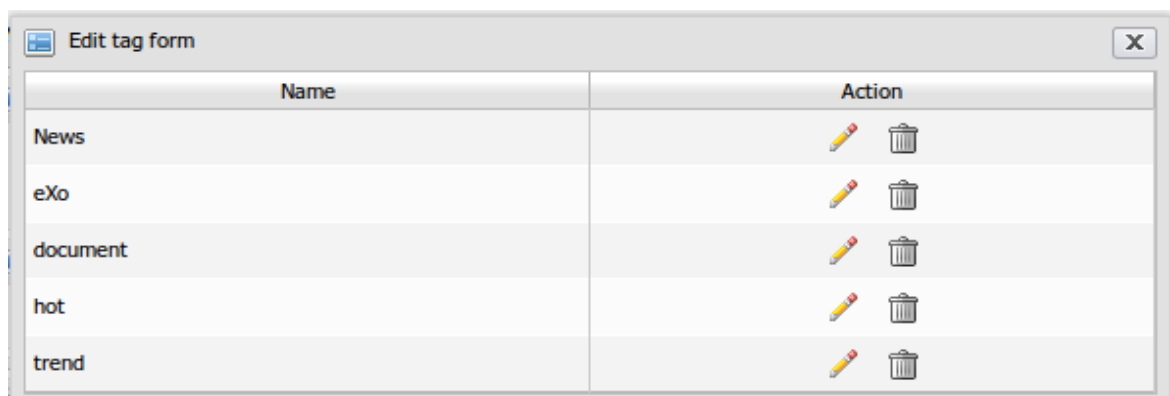
#### p) Manage tags

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

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



The **Edit tag form** will appear:













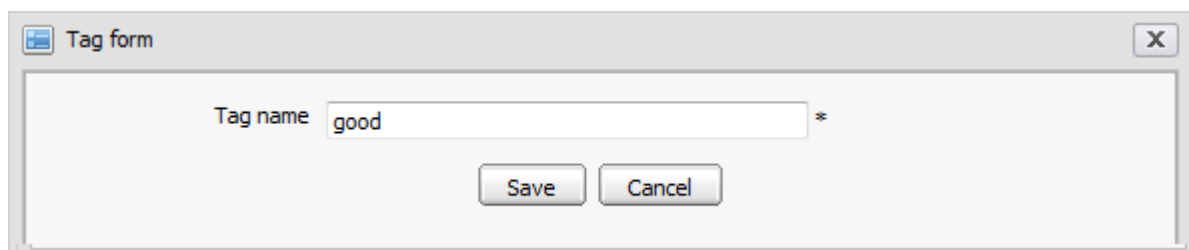
| Name     | Action  |
|----------|---|
| News     |   |
| eXo      |   |
| document |   |
| hot      |   |
| trend    |   |

Illustration 78: The Edit tag form

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

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




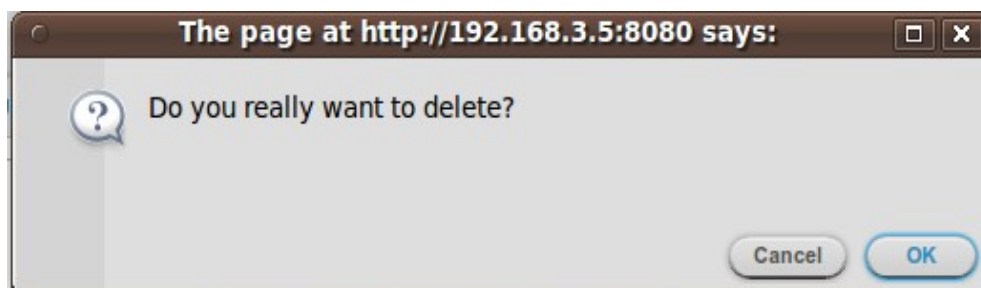
Tag name

Illustration 79: The Tag form

**Step 4:** Click the **Save** button to accept changing a tag name or the **Cancel** button

to close the **Tag form** without changing a tag name.

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



Click the **OK** button to accept deleting or the **Cancel** button to close this message without deleting a tag.


#### q) Add language for a document

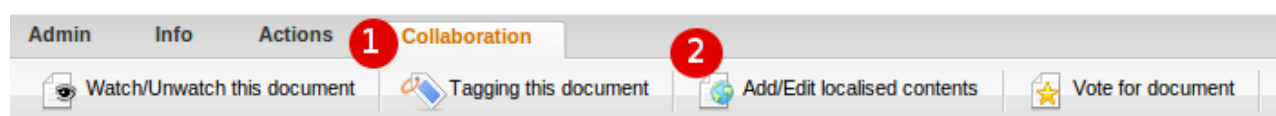
This function is used to support users to add multi-languages for a document. Each document can be displayed in many languages that are added.

Do as follows:

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

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

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



The **Multi language** form will appear:

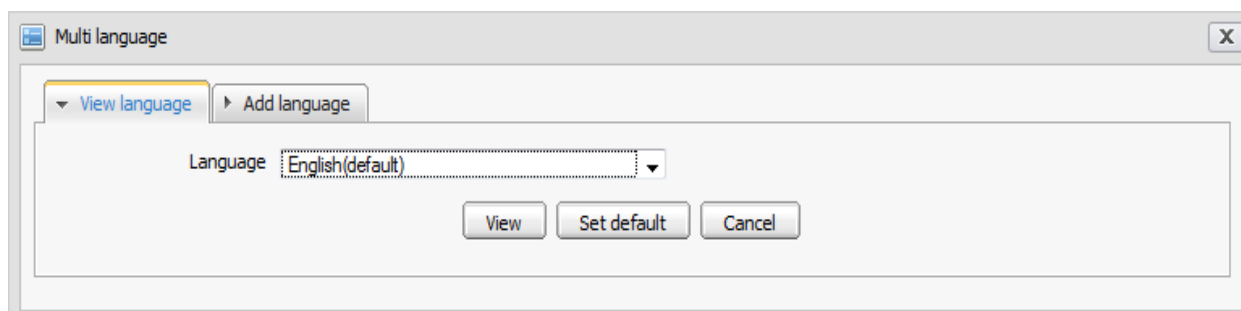


Illustration 80: The Multi language form

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, depending on what file you selected, this tab will be displayed differently, 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:

Language: ----

Set default: ☐


Title: Sample node \*

Name: sample-node \*

Description: One of the best coffeshop in Hanoi

Date: 05/19/2010

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

Upload image: 

Mime Type: image/jpeg

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

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

Save Cancel

this area is shown differently, depends on the filetype.

Illustration 81: Add language tab

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

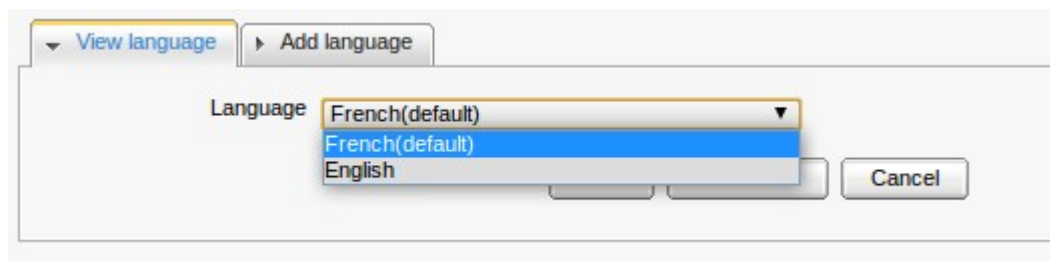
If the selected language has not been added for current document, the content field will be blank.

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

Language: French

Set default: ☒

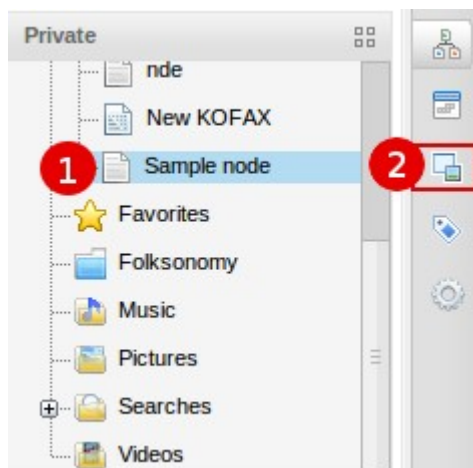
**Step 6:** Click the **Save** button, you will be back to the **View language** tab. Your selected language is now added into the **Language** field:



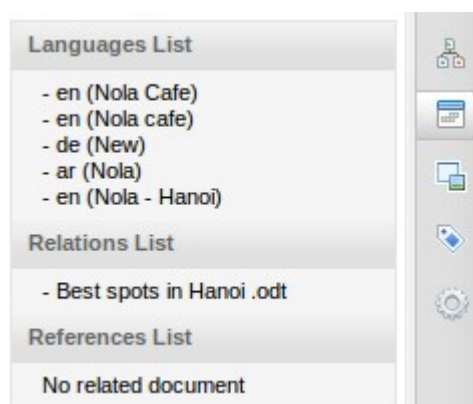
You can view this document in new added language by selecting the language from the language drop-down list then click the **View** button.

- ✓ 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 new language by clicking on the corresponding link in **Languages List**.

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



*You can not add multi-language for a File Plan.*

*When a document is a sub-node of a File Plan you also can not add language for it.*

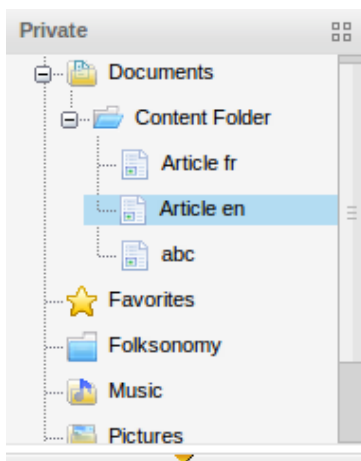
#### r) Add translation for a document.


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

By default, the **Add translation button** is not displayed on the toolbar. You have to enable this function by going to Sites Administration -> Content Presentation -> [Manage Views](#)

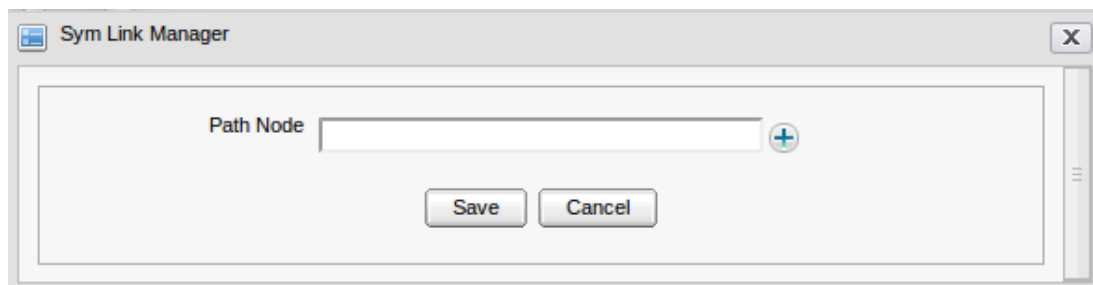
- ✓ To add translation for a document, do as follows:


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

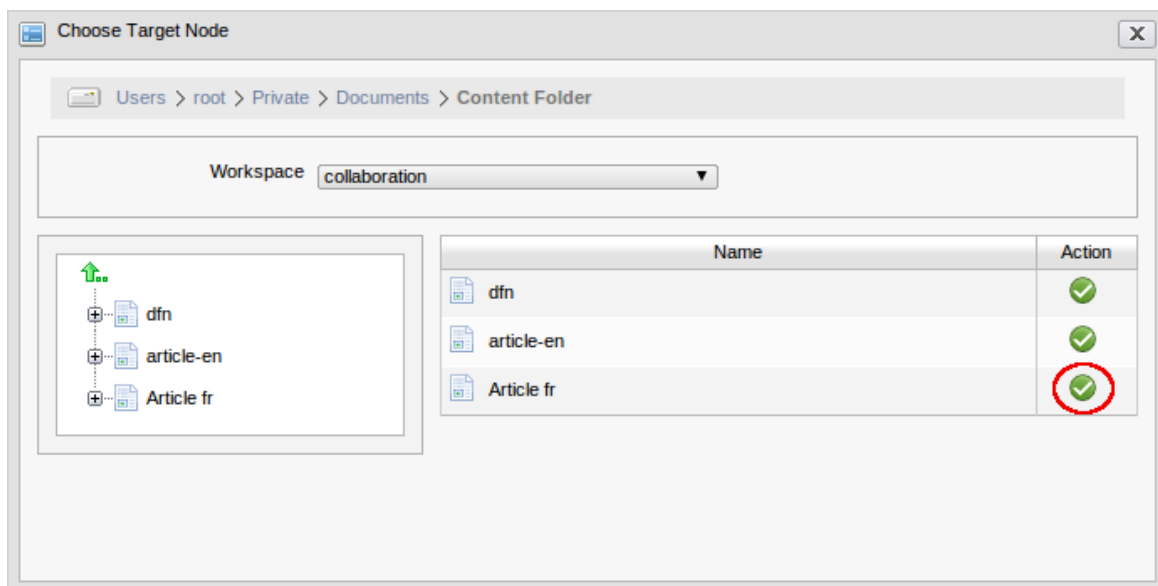


**Step 2:** Click on the  **Add Translation** button on the **Action** bar.

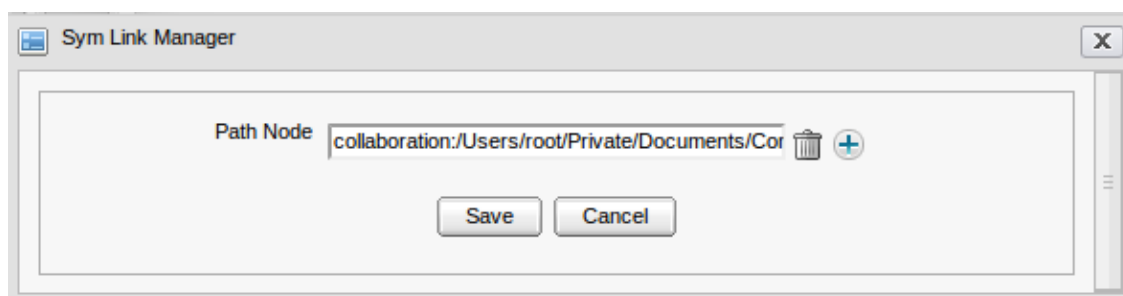
The Symlink manager will appear:



**Step 4:** Click the  button then browse to the target document that's 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 select the document click the **Save** button on the Sym Link manager form:



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




### s) Add language for an uploaded file

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

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



Name

Select a file   

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

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

### t) Vote for documents

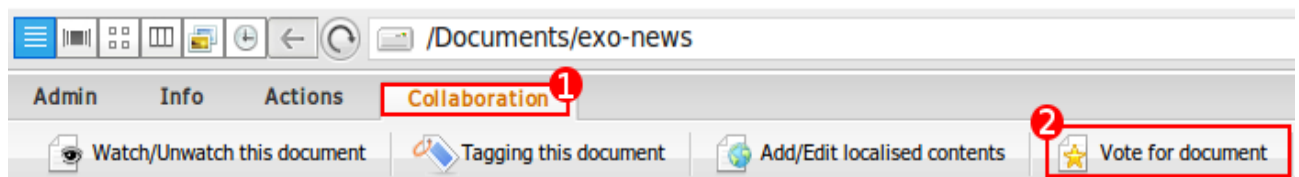
This function is used to vote for a document. In which, you can not vote for a File Plan document.

To vote for a document, do as follows:

**Step 1:** Open a document you want to vote.

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

**Step 3:** Click the  **Vote for document** button.



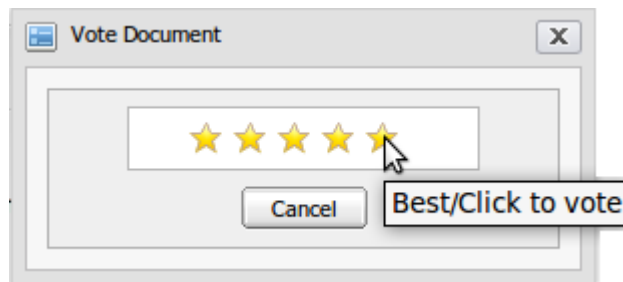
The **Vote Document** form will appear:

**Vote Document**

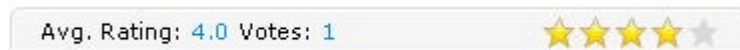
★ ★ ★ ★ ★

Illustration 82: The Vote Document form

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



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



#### u) Comment on documents

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

To comment for a document, do as follows:

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

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

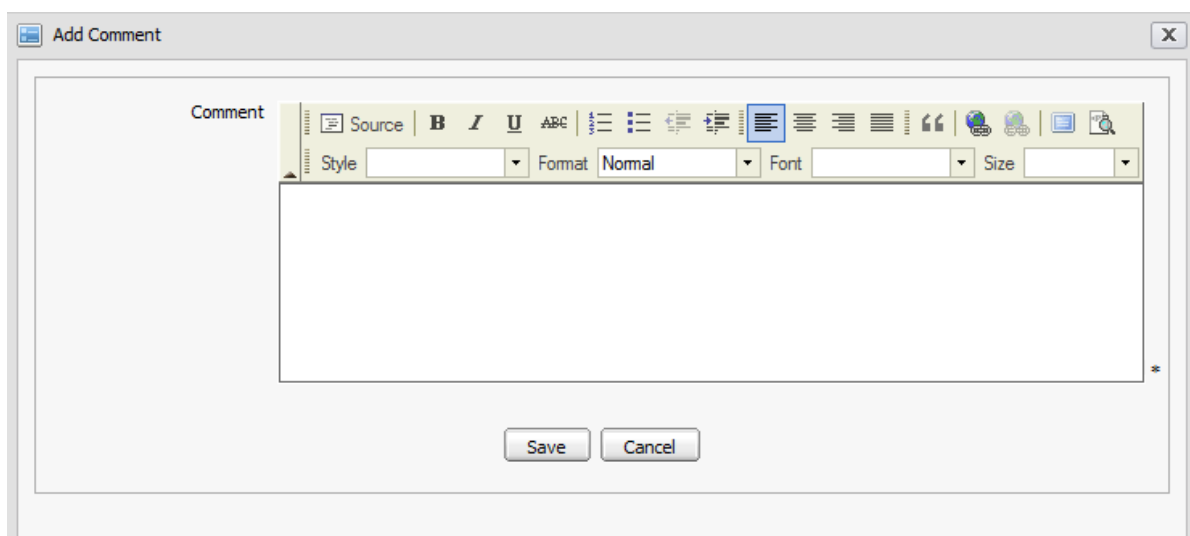
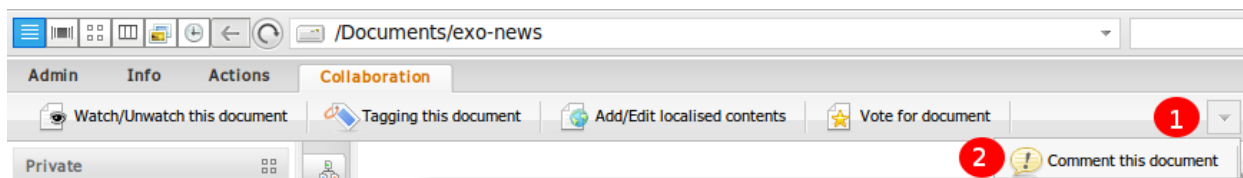



Illustration 83: The Add comment form

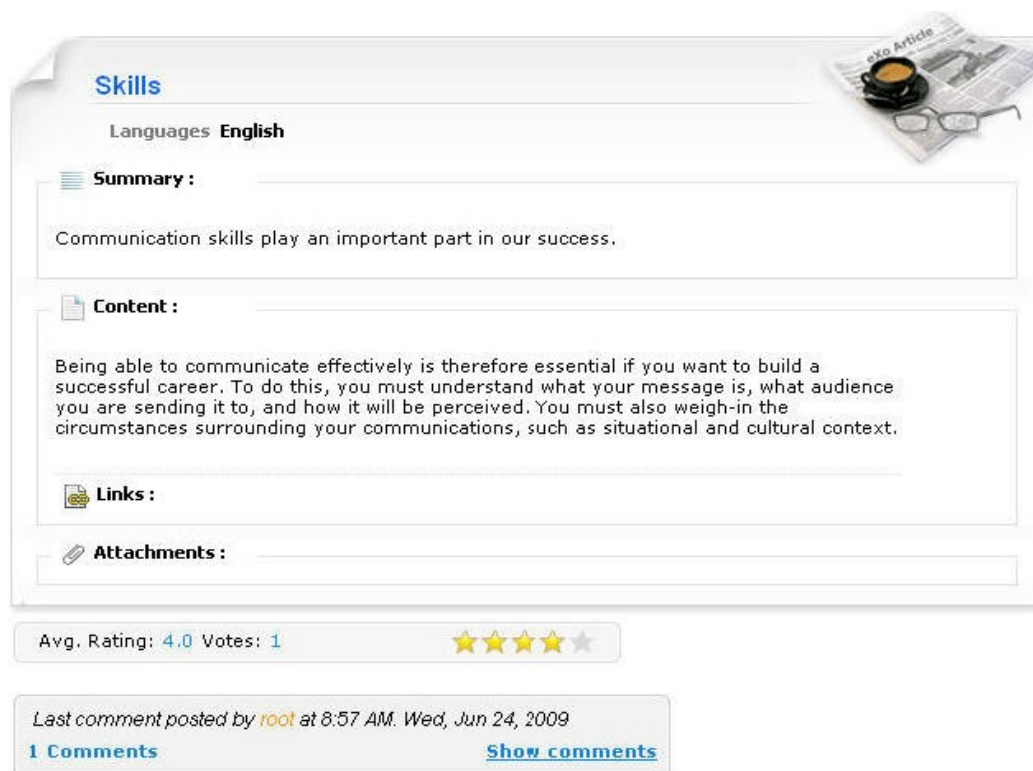


**Step 3:** Click the  button. The **Add Comment** form will appear:

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

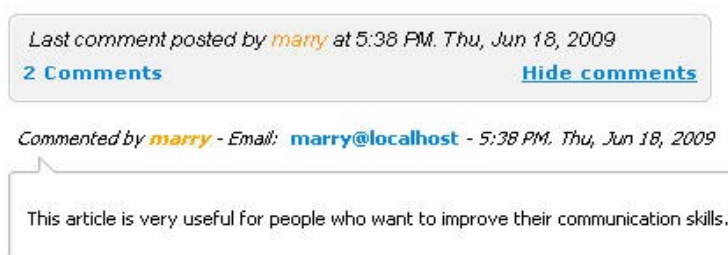
**Step 5:** Click the **Save** button.

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





The screenshot shows a document titled "Skills" in the eXo WCM & DMS interface. The document is in English. It has a "Summary" section with the text "Communication skills play an important part in our success." and a "Content" section with the text "Being able to communicate effectively is therefore essential if you want to build a successful career. To do this, you must understand what your message is, what audience you are sending it to, and how it will be perceived. You must also weigh-in the circumstances surrounding your communications, such as situational and cultural context." There are also "Links" and "Attachments" sections. Below the document content, there is a rating section showing "Avg. Rating: 4.0 Votes: 1" with five stars. At the bottom, there is a comment section showing "Last comment posted by root at 8:57 AM. Wed, Jun 24, 2009" and "1 Comments" with a "Show comments" link.

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



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

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

### 3.3.5 Search in Sites Explorer


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

#### 3.3.5.1 Simple Search

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

Do as follows:

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

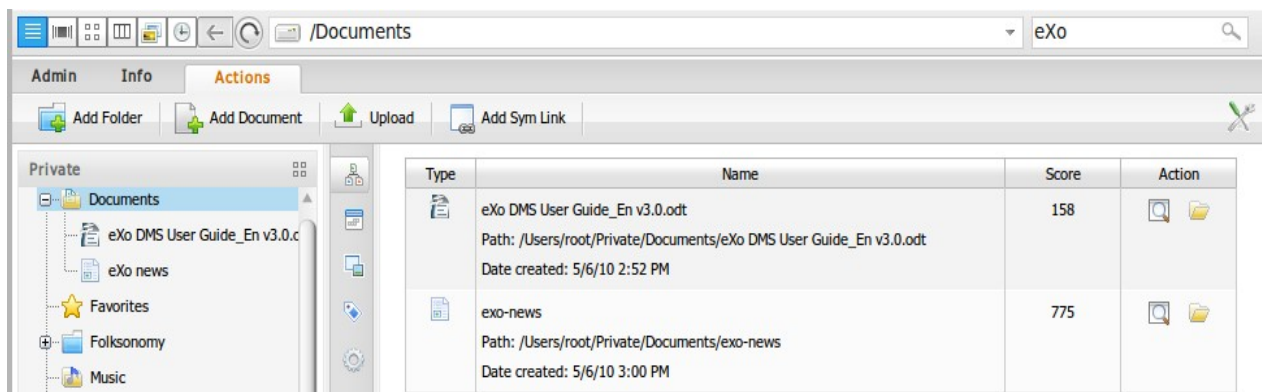
**Step 2:** Click the magnifying glass icon  to search.

The search result will be returned in the right panel.







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

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







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




The screenshot shows the eXo Sites Explorer interface. The top navigation bar includes 'Admin', 'Info', and 'Actions' tabs. Below the navigation bar, there are buttons for 'Add Folder', 'Add Document', 'Upload', and 'Add Sym Link'. The left sidebar shows a tree view of the 'Private' space, with 'Documents' selected. The main content area displays a table of search results for the term 'eXo'.

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



Click the  icon in the Action column to view the content:

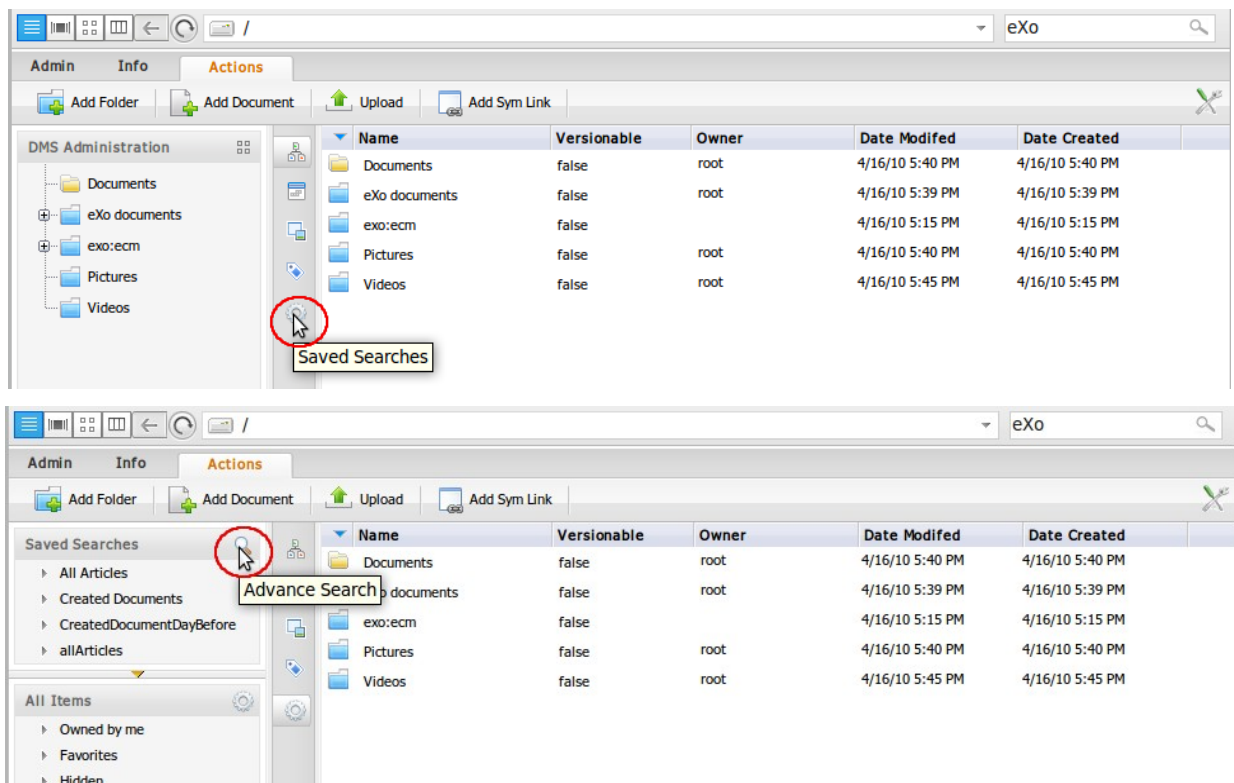
| Type  | Name   | Score | Action  |
|---|--|-------|---|
|  | eXo DMS User Guide_En v3.0.odt<br>Path: /Users/root/Private/Documents/eXo DMS User Guide_En v3.0.odt<br>Date created: 5/6/10 2:52 PM | 158   |   |
|  | exo-news<br>Path: /Users/root/Private/Documents/exo-news<br>Date created: 5/6/10 3:00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

You can also click the  icon to go to the node that contains the corresponding search result. After clicking this icon, the node containing that search result node will be shown.

### 3.3.5.2 Advanced search

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

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



The **Advanced Search** form appears:

The Advanced Search form is displayed. It has a tabbed interface with 'Search by Name' selected. The search location is set to '/Users/root'. The search criteria is 'Content name' followed by a text input field and an asterisk. There are 'Search' and 'Cancel' buttons.

Illustration 84: The Advanced Search form

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

#### a) Search by name

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

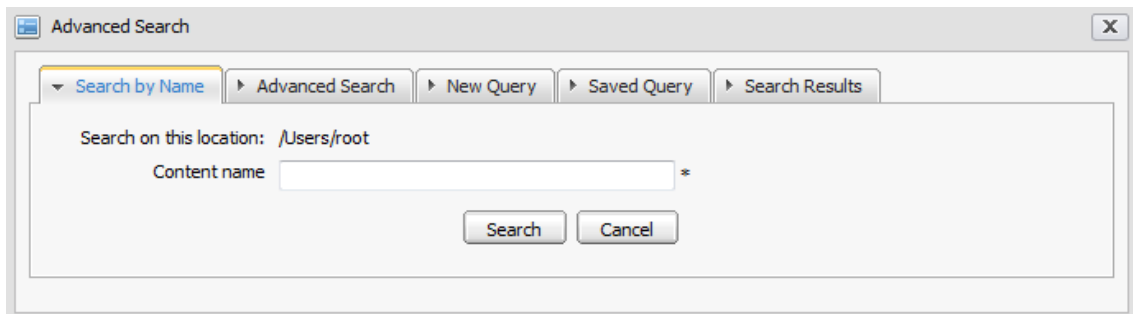
The screenshot shows the 'Advanced Search' dialog box with the 'Search by Name' tab selected. The 'Search on this location' is set to '/Users/root'. There is a text input field for 'Content name' followed by an asterisk. Below the input field are 'Search' and 'Cancel' buttons.

Illustration 85: 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 the **Search** button. It will return with the message “No result found” if there is no node with the searching name. If the searching name has been existing, the result will be return in the **Search Results** tab like in simple search.

#### b) Search with constraints

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

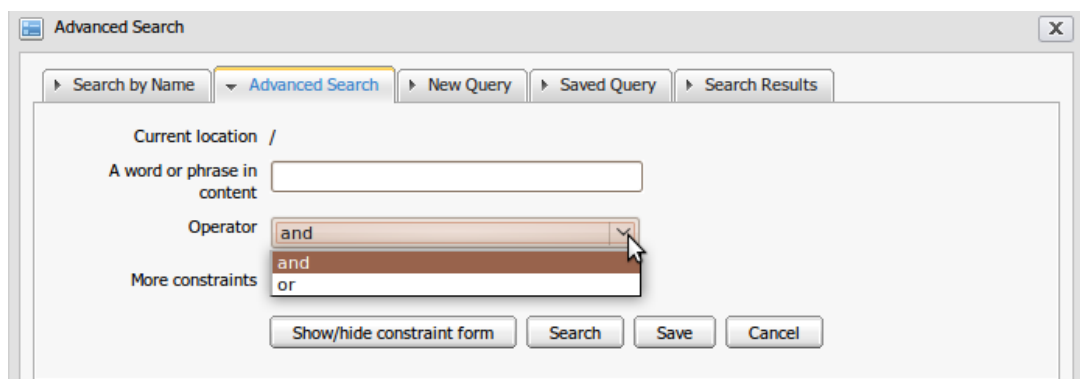
**Current location** is the path that you selected to search.

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

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

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

**Step 2:** Select the **Operator**

The screenshot shows the 'Advanced Search' dialog box with the 'Advanced Search' tab selected. It displays a 'Current location' as '/'. There is a text input field for 'A word or phrase in content'. Below it is an 'Operator' dropdown menu with 'and' selected. Further down is a 'More constraints' section with another input field. At the bottom are buttons for 'Show/hide constraint form', 'Search', 'Save', and '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** button to add more constraints.

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

The adding constraints form will appear:

The screenshot shows a dialog box for adding constraints. At the top, it says 'Operator : and' with a circled '1' next to it. Below this are seven numbered options (2-7) for adding constraints, each with a checkbox and a corresponding icon: 2. 'Property : [input] Contain Exactly : [input]' (icon: two overlapping squares); 3. 'Property : [input] Contain : [input]' (icon: one square inside another); 4. 'Property : [input] Not Contain : [input]' (icon: one square with a diagonal line); 5. 'CREATED [dropdown] From [input] To [input]' (icon: calendar); 6. 'Document Type : [input]' (icon: document); 7. 'Category : [input]' (icon: folder). At the bottom are 'Add' and 'Cancel' buttons.

Details:

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

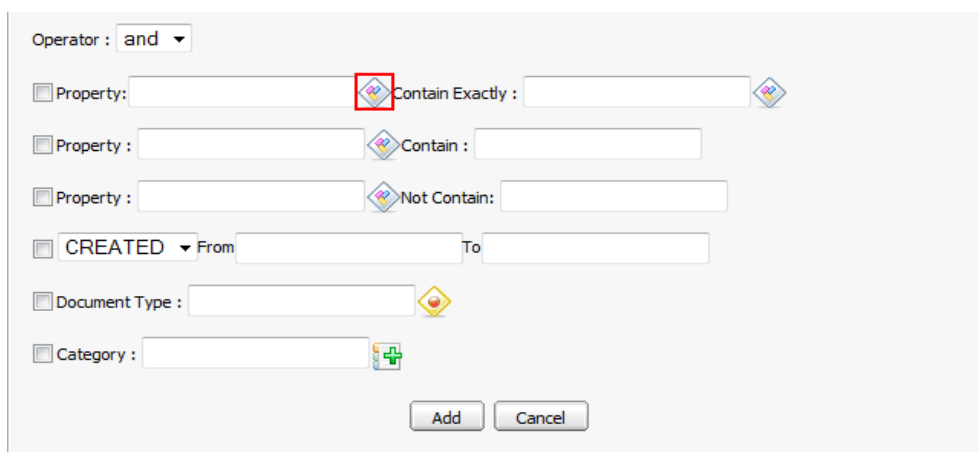
**Step 4:** Select the constraint operator (AND/OR)

**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 check box corresponding to the one you want to add a constraint


2. Input the property you want to find or click the Add Property icon .




Operator : and ▼


☒ Property :   Contain Exactly :  

☐ Property :   Contain :

☐ Property :   Not Contain :

☐ CREATED ▼ From  To

☐ Document Type :  

☐ Category :  

Add Cancel

A form to select properties appears:

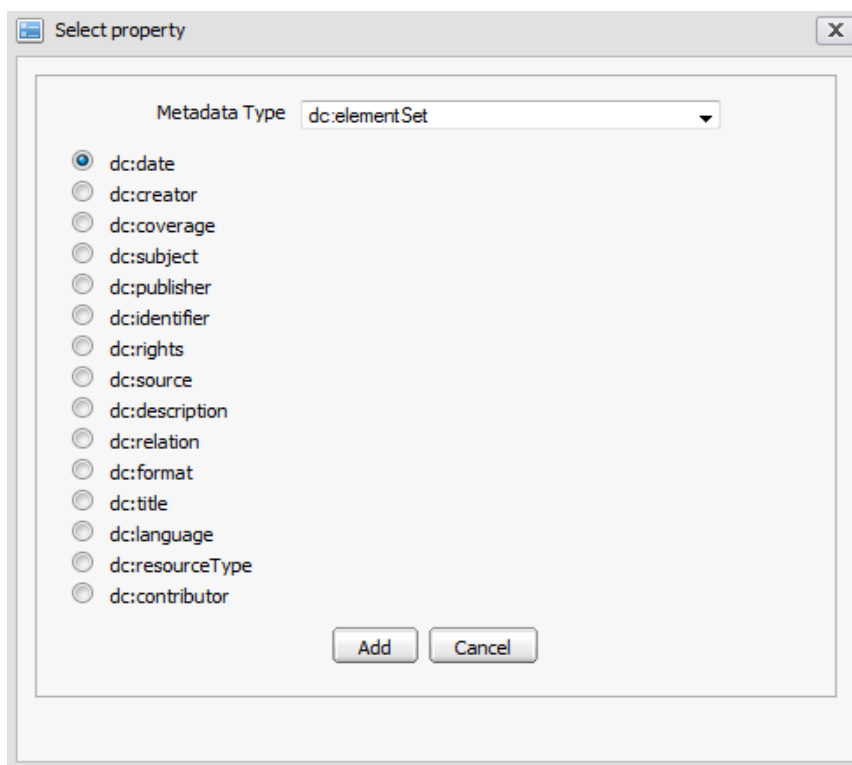
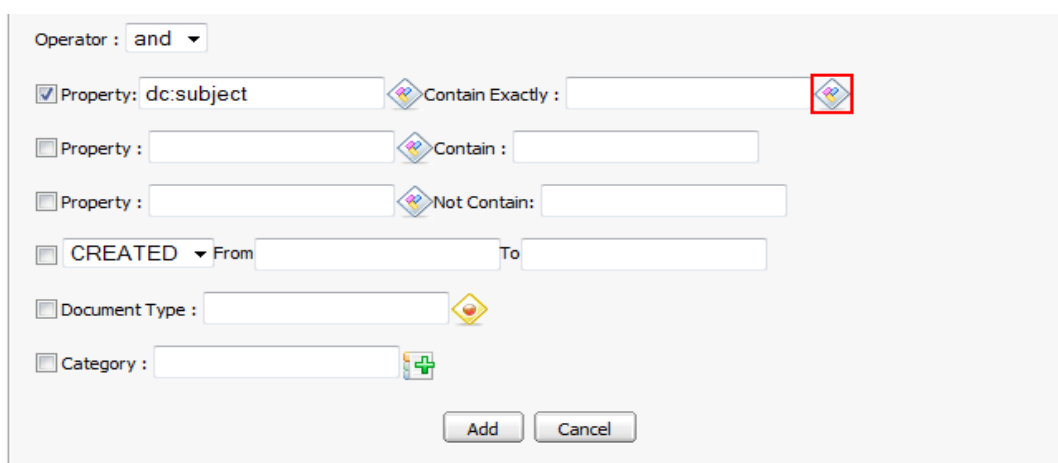


Illustration 86: The Select property form

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

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



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

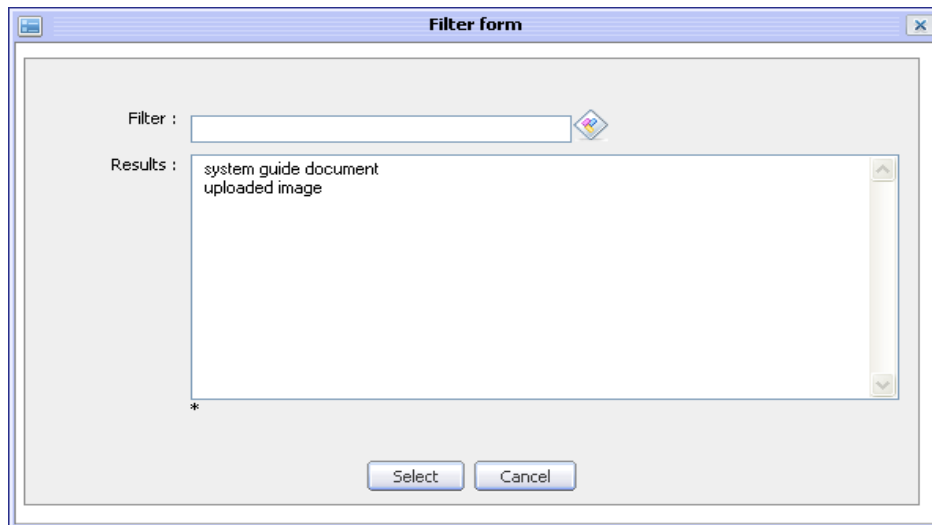




Illustration 87: The Filter form

If there's the value you want, move the cursor on name and click. 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 filter 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 the **Add** button.



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

The screenshot shows a search filter interface with the following elements:

- Operator: **and**
- ☒ Property: **dc:subject** [icon] Contain Exactly: [text box] [icon]
- ☐ Property: [text box] [icon] Contain: [text box]
- ☐ Property: [text box] [icon] Not Contain: [text box]
- ☐ **CREATED** [dropdown] From [text box] To [text box]
- ☐ Document Type: [text box] [icon]
- ☐ Category: [text box] [icon]


A mini calendar for March 2010 is displayed over the 'From' and 'To' date fields. The calendar shows the days of the week (S, M, T, W, T, F, S) and the dates (1 to 31). The date 10 is highlighted in the 'To' field.

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

The screenshot shows the same search filter interface as before, but with the date range for the 'CREATED' field selected:

- Operator: **and**
- ☒ Property: **dc:subject** [icon] Contain Exactly: [text box] [icon]
- ☐ Property: [text box] [icon] Contain: [text box]
- ☐ Property: [text box] [icon] Not Contain: [text box]
- ☐ **CREATED** [dropdown] From **03/01/2010** To **03/15/2010**
- ☐ Document Type: [text box] [icon]
- ☐ Category: [text box] [icon]

At the bottom of the interface, there are two buttons: **Add** and **Cancel**.

- **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.

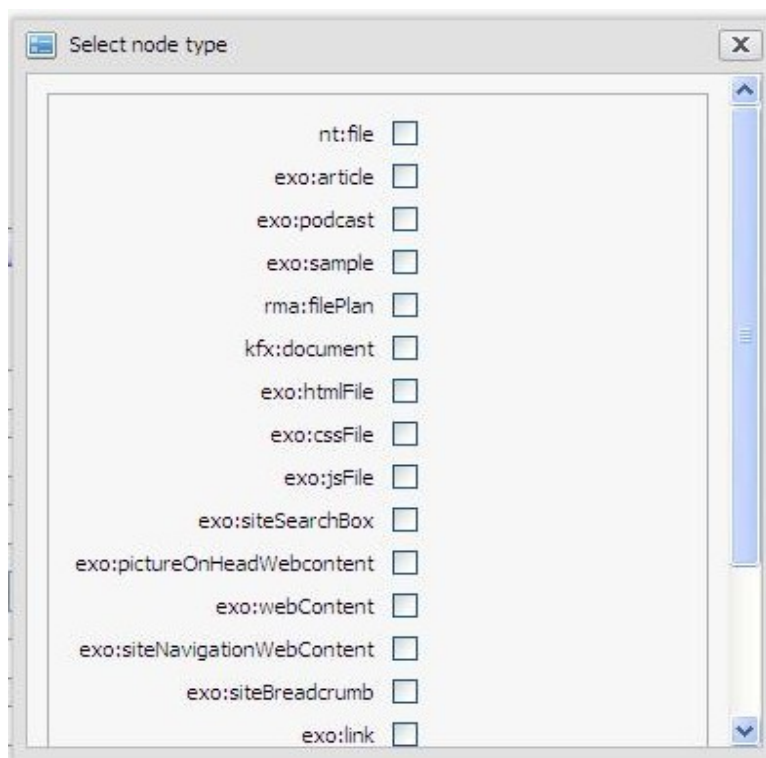






Illustration 88: The Select node type form

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


Operator : and ▼


☒ Property : dc:title  Contain Exactly : uploaded image 

☐ Property :   Contain :

☐ Property :   Not Contain :

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

☒ Document Type : ntfile,exo:article,exo:poc 

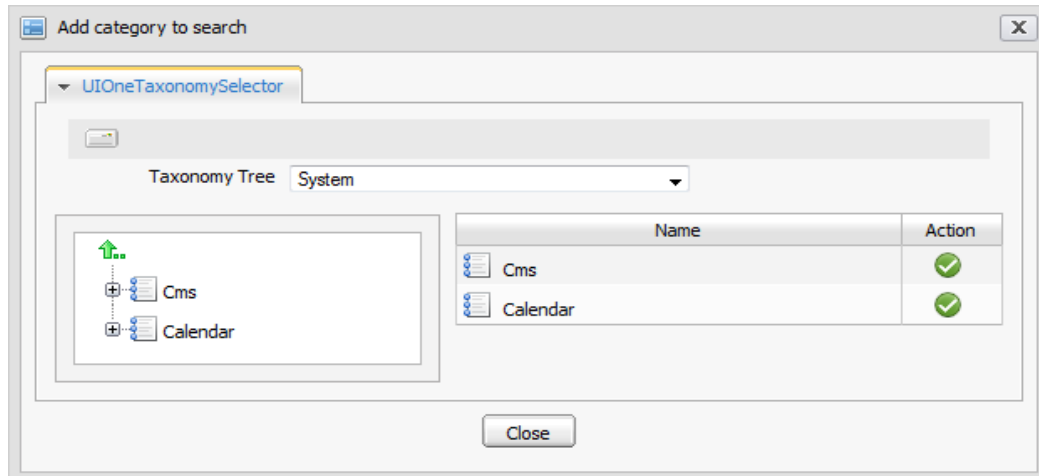
☐ Category :  


Add Cancel

- **5.5** To add a constraint to search by categories, do as follows:
  1. Check the check box that corresponds to the one which you want to add constraints

2. Input the categories to search or click  .

A list of all categories will appear:



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


4. Click the **Add** button 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') 

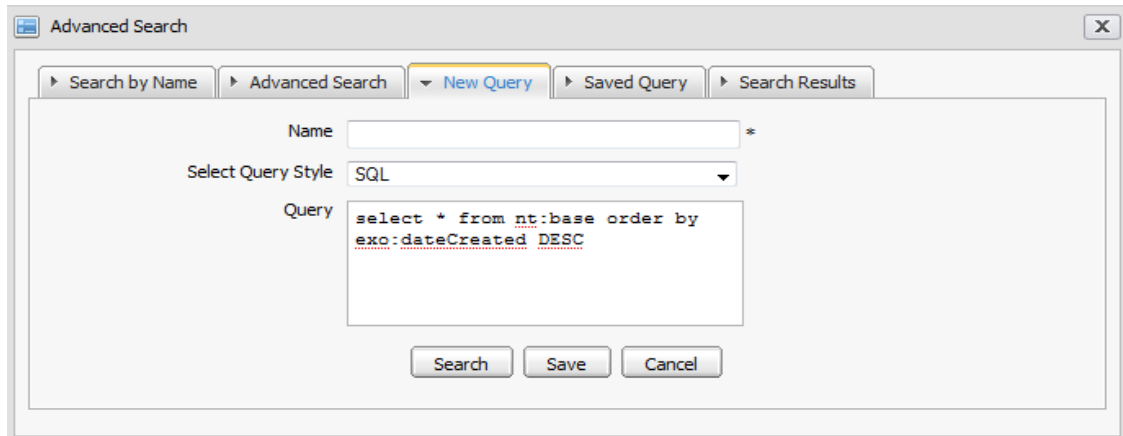
To remove a constraint, just click the corresponding trash icon 

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

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

### c) Search by creating a new query

Select the **New Query** tab:



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

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

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

- ✓ To create new query, do as follows:

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

**Step 2:** Select a query style.

**Step 3:** Input a query statement.

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

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

### d) Search by existing queries

Select the **Saved Query** tab:

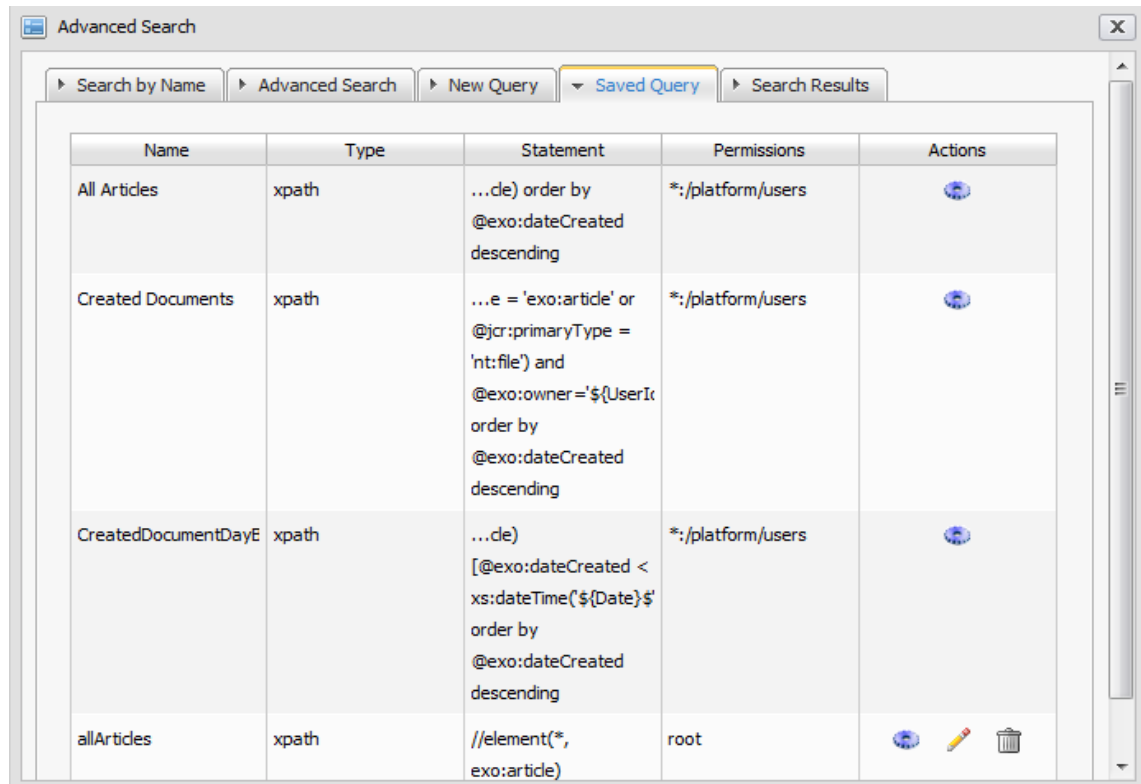


Illustration 89: The Saved Query tab in the Advanced Search form

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

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

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

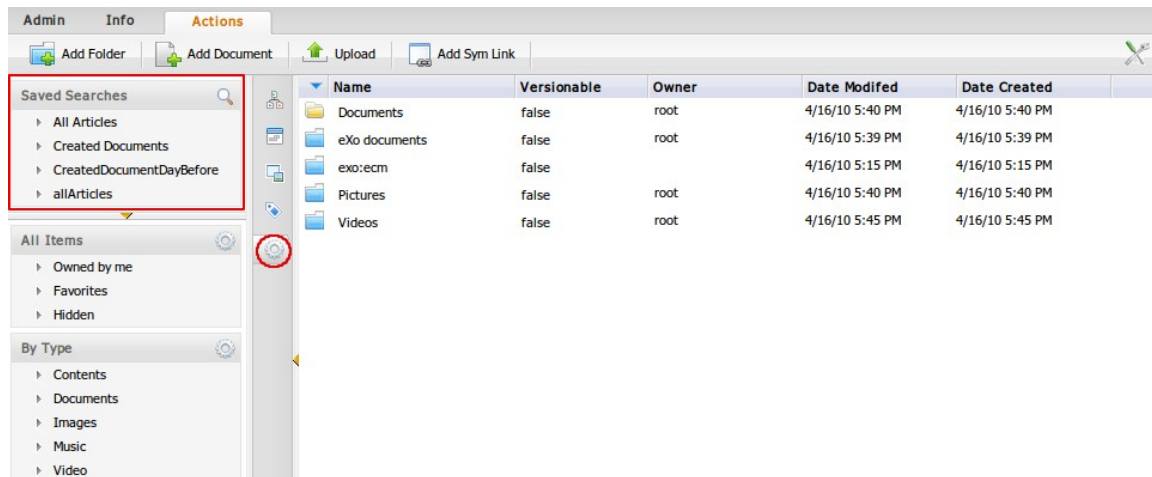
Click if you want to delete the query (note that you must have the right to delete the query to perform this action).

### 3.3.5.3 Quick search

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

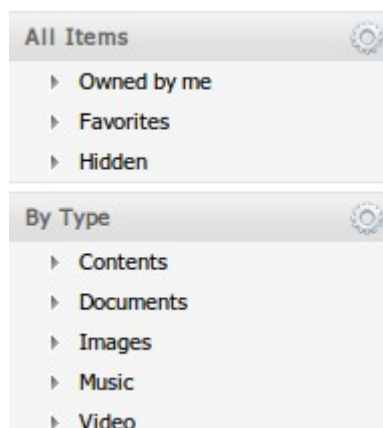
**Step 1:** Click the icon to see the existing queries list.

The existing query list will be appeared: **All Articles**, **Created Documents**, **CreatedDocumentDayBefore**, and **allArticles**.



**Step 2:** Do the same like when you do the advanced search in the **Saved Query** tab.

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




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

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

### 3.3.6 Preference Setting

This function is used to set up your browsing preferences.

Do as followings:

**Step 1:** Click the  icon on the right corner of the 'Sites Explorer' portlet. There will

be a form to set up your browsing preferences:

**Preference Setting**

**Set up your browsing preferences**

- Enable JCR like structure ☐ ①
- Show sidebar ☒ ②
- Show "non document" nodes ☒ ③
- Show referenced documents ☐ ④
- Show hidden nodes ☐ ⑤
- Show items by user in Timeline View ☒ ⑥
- Enable drag & drop ☒ ⑦

Query Type: SQL ⑧

Sort by: Alphabetic ⑨

Order: Ascending ⑩

Nodes Per Page: 10 ⑪

**Save** **Back**

Illustration 90: The Preference setting form

|  |  |
|--|--|
| <b>1. Enable JCR like structure</b>            | This option is to display nodes in a document in tree structure    |
| <b>2. Show sidebar</b>                         | This option is to display a sidebar                                |
| <b>3. Show sidebar</b>                         | This option is to display a sidebar                                |
| <b>4. Show non document nodes</b>              | This option is to display nodes that are non – documents           |
| <b>5. Show referenced documents</b>            | This option is to display referenced documents                     |
| <b>6. Show hidden nodes</b>                    | The option is to display hidden nodes                              |
| <b>7. Show items by user in Time line View</b> | This option is to display items by a user or not in Timeline view  |
| <b>8. Enable drag and drop</b>                 | 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 the **Save** button to set up preferences or click the **Back** button to escape from this form without saving.

### 3.3.7 Admin

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

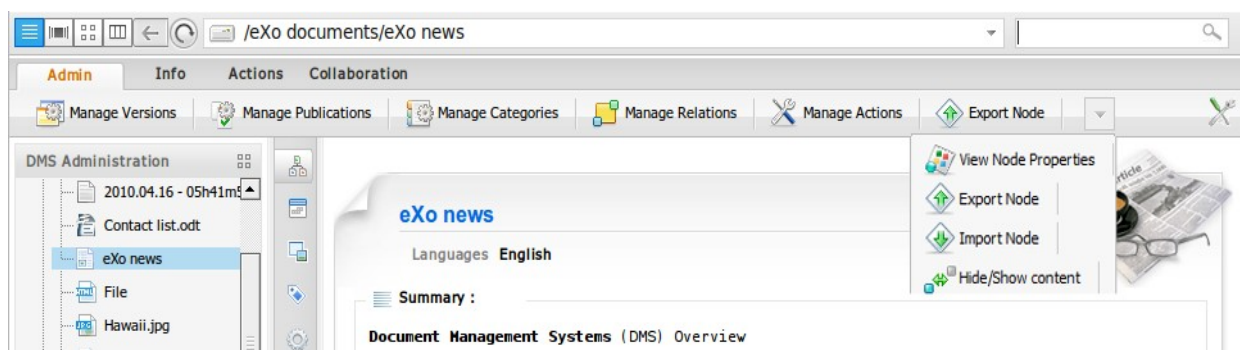
#### 3.3.7.1 Manage versions

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

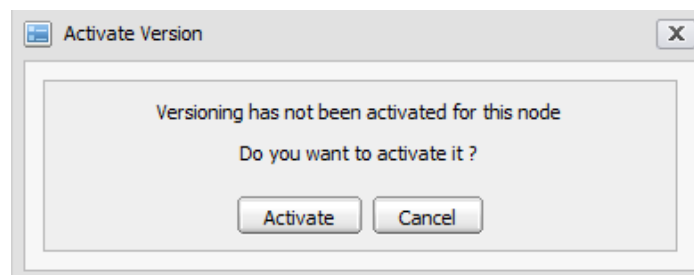
##### a) Add versions for node

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

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



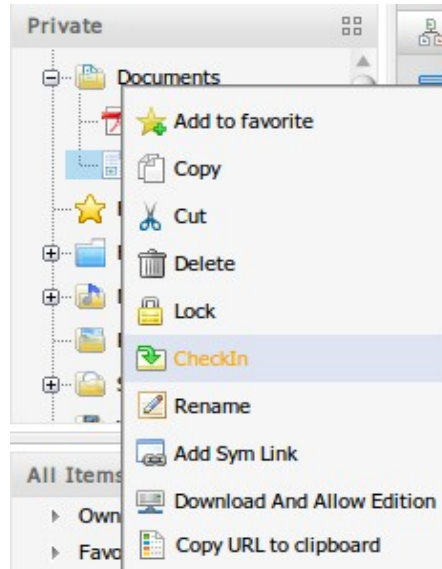
**Step 3:** Click the  **Manage Versions** button. A confirmation message will appear:





**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:

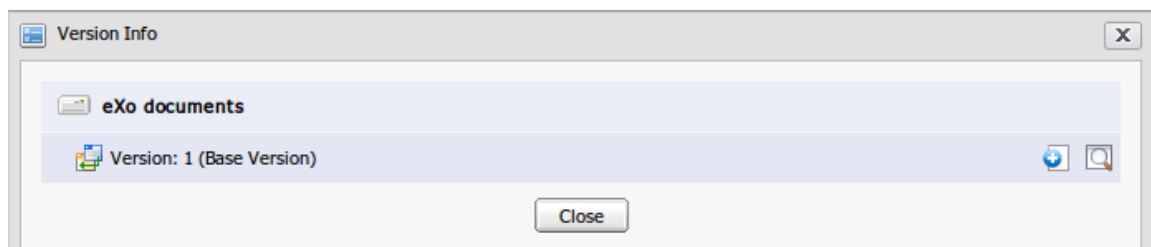


Illustration 91: The Version info form

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

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



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

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

**b) Add removing labels for versions**

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

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

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

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

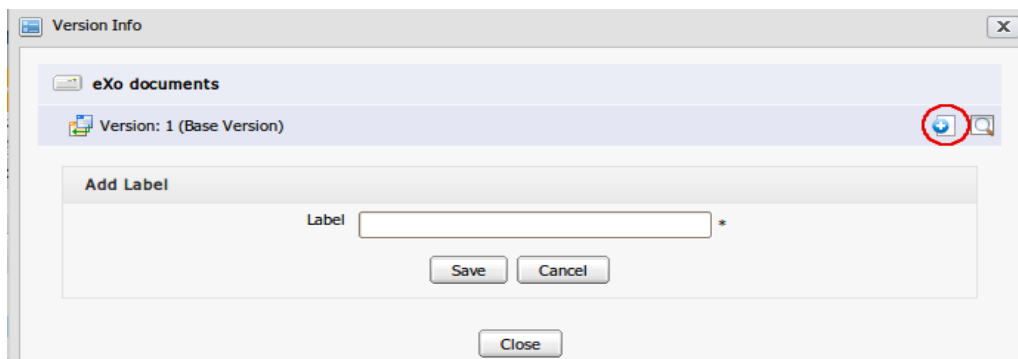
The screenshot shows the 'Version Info' window. At the top, there's a breadcrumb 'eXo documents'. Below it, a version entry 'Version: 1 (Base Version)' is listed. To the right of this entry, there are two icons: a blue plus icon (circled in red) and a magnifying glass icon. Below the version list, there is an 'Add Label' section with a text input field labeled 'Label' followed by an asterisk. At the bottom of this section are 'Save' and 'Cancel' buttons. Below the entire section is a 'Close' button.

Illustration 92: The Version Info form

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

You can not to use special characters like : @, #, \$, etc

The label name must be different from the existing labels.

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

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

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

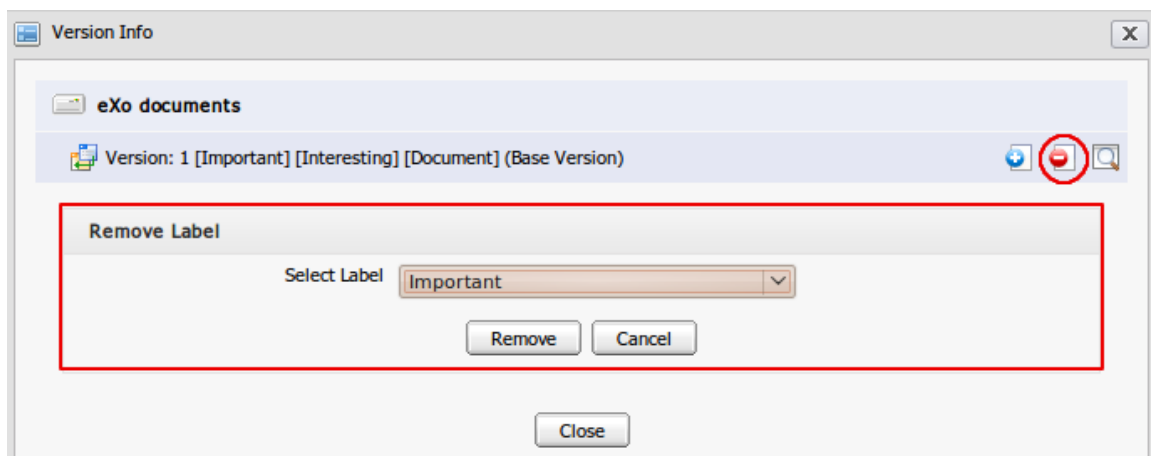
The screenshot shows the 'Version Info' window. The version entry is 'Version: 1 [Important] [Interesting] [Document] (Base Version)'. To the right of this entry, there are three icons: a blue plus icon, a red minus icon (circled in red), and a magnifying glass icon. Below the version list, there is a 'Remove Label' section highlighted with a red rectangle. It contains a dropdown menu labeled 'Select Label' with 'Important' selected. At the bottom of this section are 'Remove' and 'Cancel' buttons. Below the entire section is a 'Close' button.

Illustration 93: The Remove label form

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

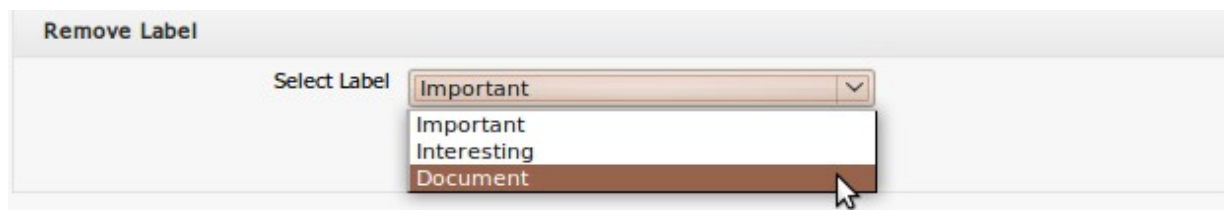



Illustration 94: Select Label in the Remove Label form

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

### c) View versions of nodes

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

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

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

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

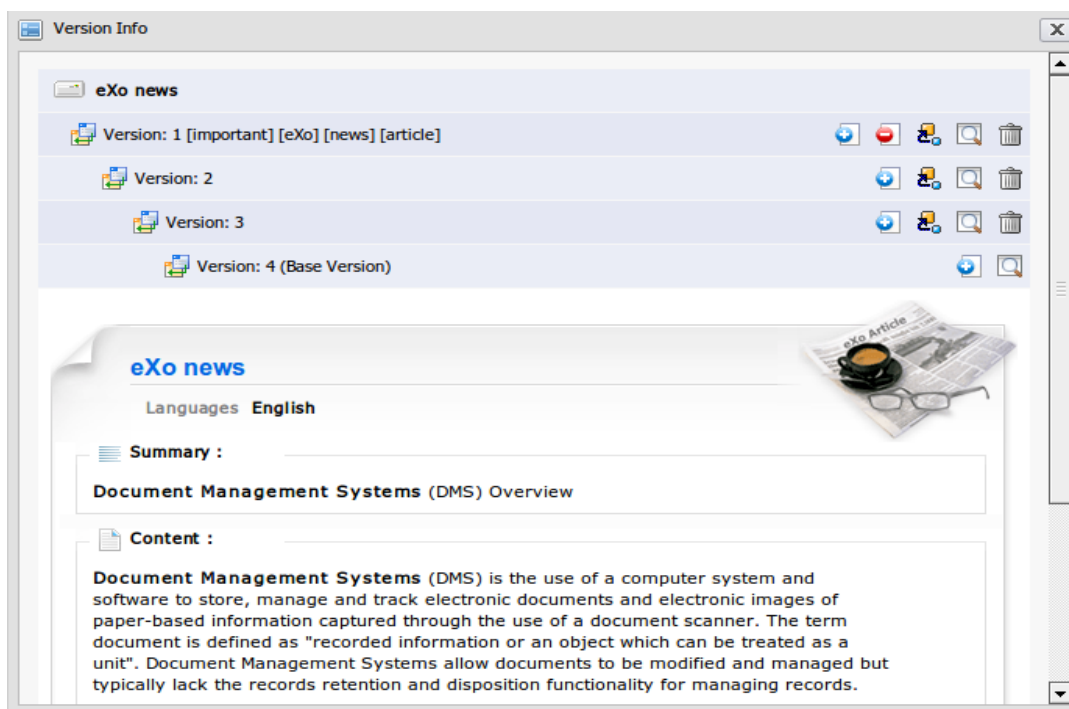



Illustration 95: The version info form



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

#### d) Restore versions of nodes

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

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

**Step 2:** Click the  Manage Versions button 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  icon. The selected version will become a base version.

#### e) Delete versions

Do the follows:

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



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

**Step 3:** Select a version that you want to delete

**Step 4:** Click the  icon corresponding to the version you want to delete.

**Step 5:** Click the **OK** button on the confirmation message to accept deleting or click the **Cancel** button to quit without deleting.



You can not delete a base version.

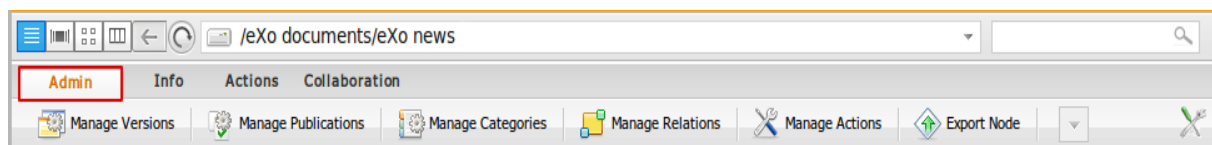
### 3.3.7.2 Manage Publications

This function is used to manage publications of a node.

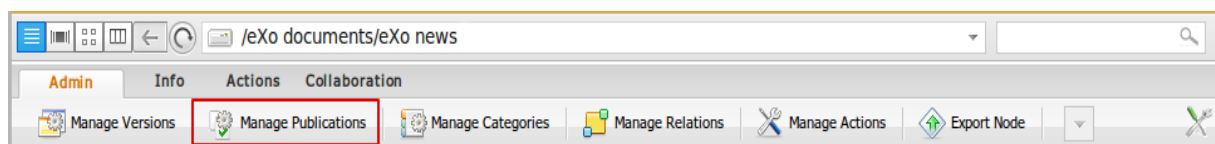
Do as follows:

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

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



**Step 3:** Click the  button on the Action bar.



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

**Manage publication**

Publication status | Publication history

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] |        |
| <a href="#">Revision: 4</a> | Apr 19, 2010 2:35:32 PM | __system | Obsolete                   |        |
| <a href="#">Revision: 2</a> | Apr 19, 2010 2:35:26 PM | __system | Obsolete                   |        |

See all versions

Close

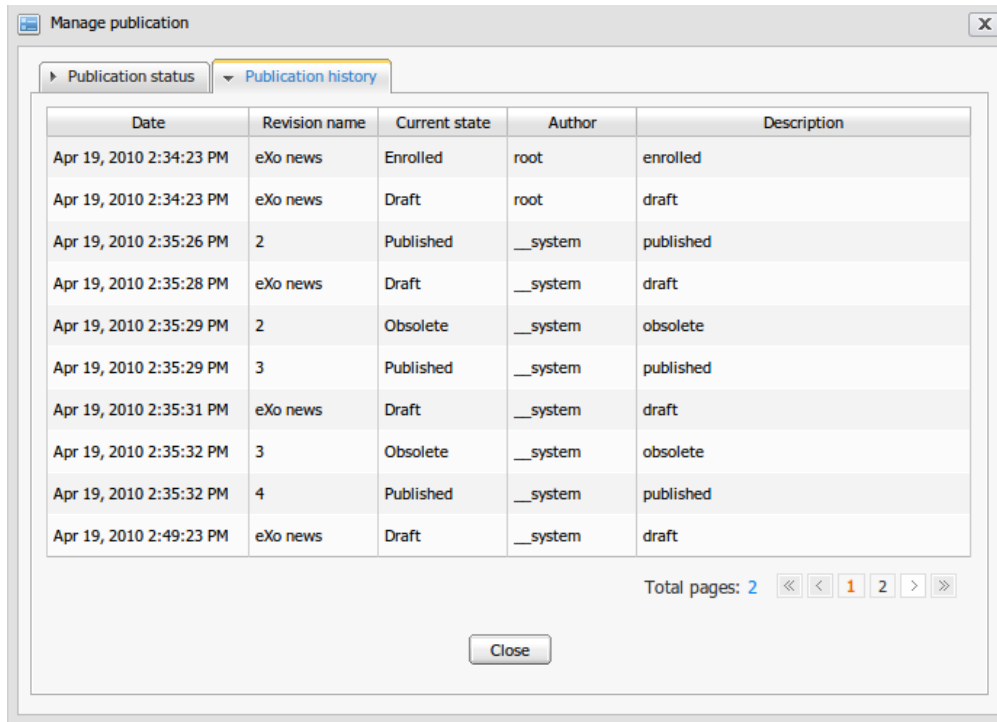
Illustration 96: The Publication Status tab in the Manage publication form

This form will display some basic information and the current state of a selected node.


**Step 4:** View the content of the node by clicking on corresponding  icon or click

the  icon 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 

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

### 3.3.7.3 Manage Categories


#### a) Add a category for a node

This function is used to add a category for a node. You can only add a category for document type.

Do as follows:

**Step 1:** Select a node that you want to add a category in the left or right panel

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

**Step 3:** Click the  button to show the **Add category** form

**Step 4:** Select the **Select category** tab to show different categories.

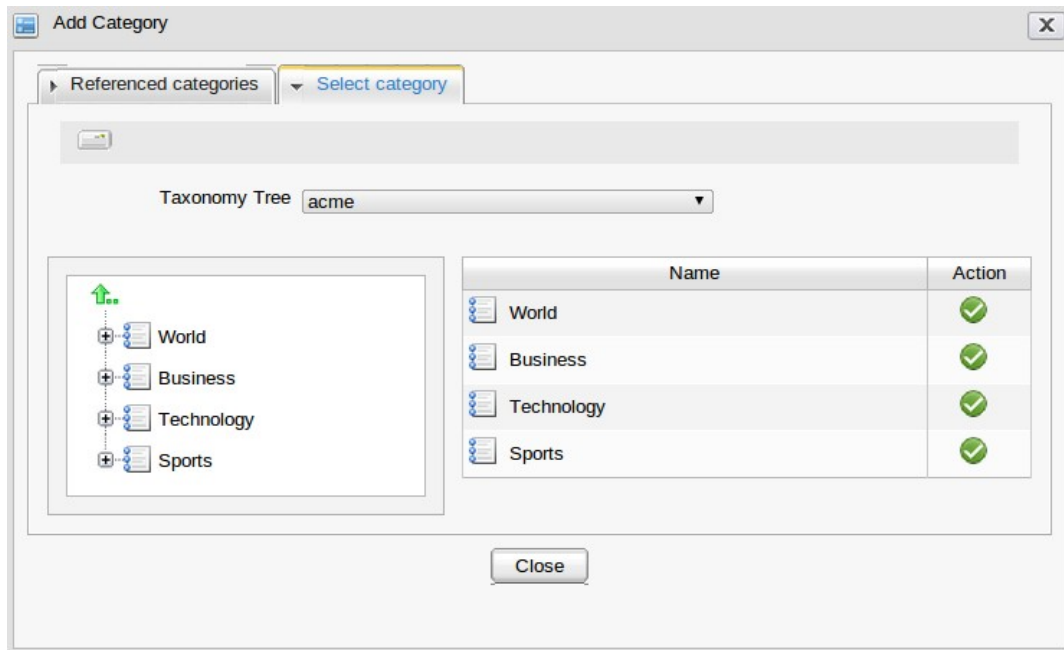



Illustration 97: The Select category tab in the Add Category form

**Step 5:** Select a category to add for a node by clicking the  icon.

The selected category will be displayed in the **Referenced categories** tab:

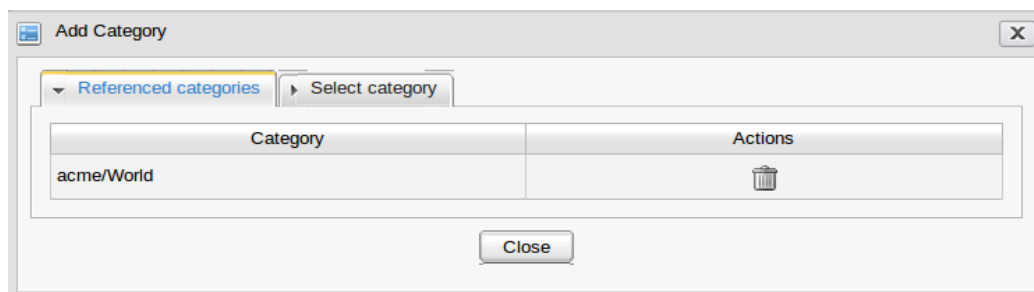


Illustration 98: The Referenced categories tab in the Add Category form

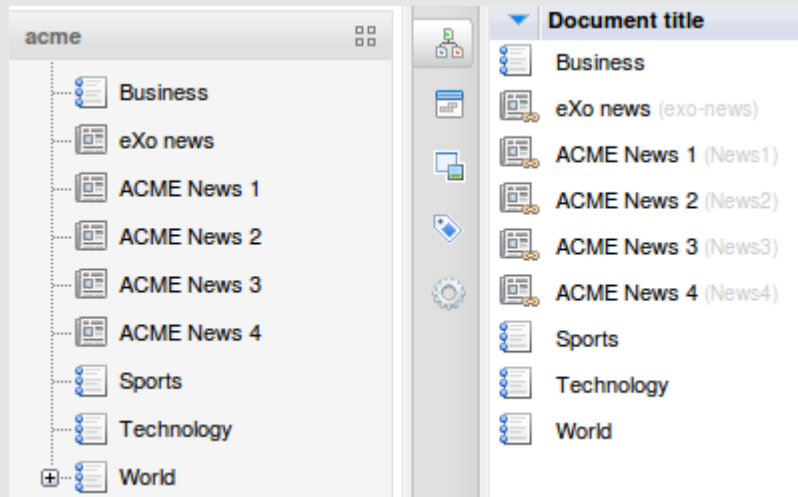
After being added a category, the node will be included in that category.

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 **World** category.



- When you copy and paste a node in a drive, a new node with different name and the same content will be stored separately in the database.
- When you copy and paste a node in a category tree, the system will create a reference to that node. It means that the new created node is just a reference to the original one. This's a useful feature that help you save the storage:




## b) Delete category

To delete a category, do as follows:

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

**Step 2:** Click the  **Manage Categories** to open the **Add category** form.

**Step 3:** Select the **Referenced categories** tab.

**Step 4:** In the row of a category you want to delete, click the  icon. The category which is added for a node will be deleted.

## 3.3.7.4 Manage relations

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

### a) Add relation for a node

Do the following steps to add relations for a node:

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

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

**Step 3:** Select  **Manage Relations** button to show the **Add Relation** form:



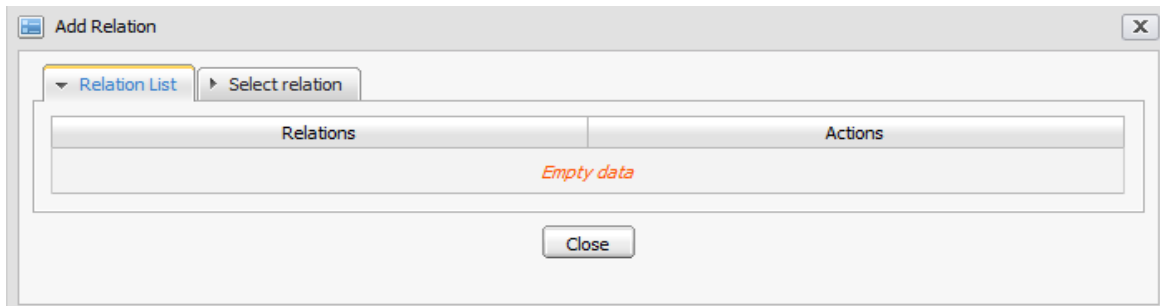


Illustration 99: The Add Relation form

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

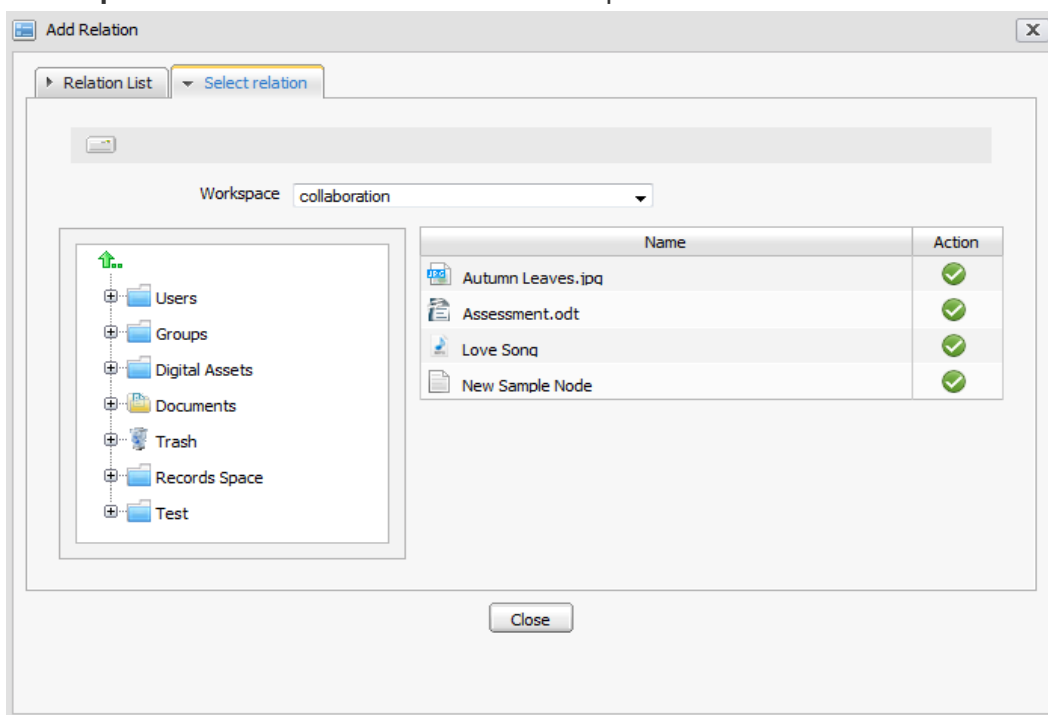
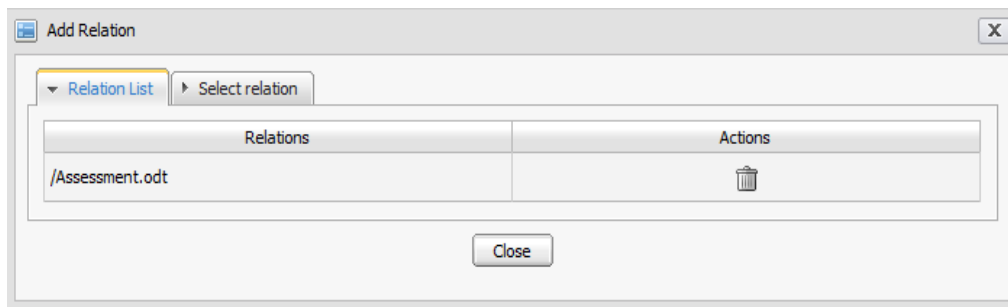


Illustration 100: The Select relation tab in the Add Relation form

**Step 5:** Select relation nodes by clicking on the ✓ icon. You only can select documents.

After the relation documents are selected, it will be listed in the **Relation List** tab:



- You can only add relations for a node to documents, uploaded files.
- You can not add relation for a node to itself.
- You not only see the related document of a node in the **Relation List** tab but also can see by selecting **Relation**. All related documents of node are displayed here.


## b) Delete relations of node

Do the follows:

**Step 1:** Select a node that has relation documents

**Step 2:** Open the **Add Relation** form by clicking the  **Manage Relations** button

**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.

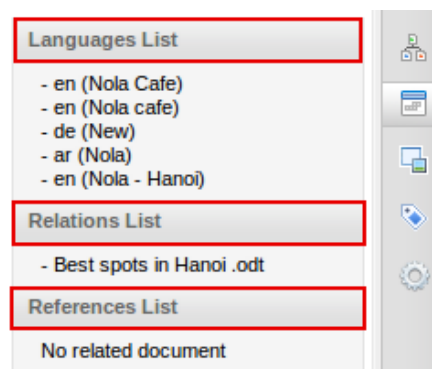
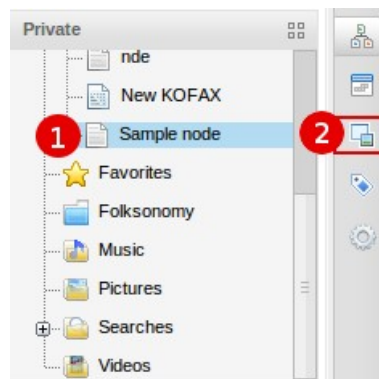
**Step 5:** Click the **OK** button on the confirmation message to accept deleting or click the **Cancel** button to quit. The related document will be deleted from this list.

## c) View Relations of node

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

**Step 1:** Select a nod that contains relation documents.

**Step 2:** Click the relation button on the side panel :



All relations of the selected node will be displayed on the left panel:

You can click the name of the relations in the list to view. The corresponding relation will be displayed on the right panel.

### 3.3.7.5 Manage actions

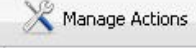
#### a) Add an action

This function supports you in adding an action to a node.

Do the follows:

**Step 1:** Select a node you want to add an action

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

**Step 3:** Click the  **Manage Actions** 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:

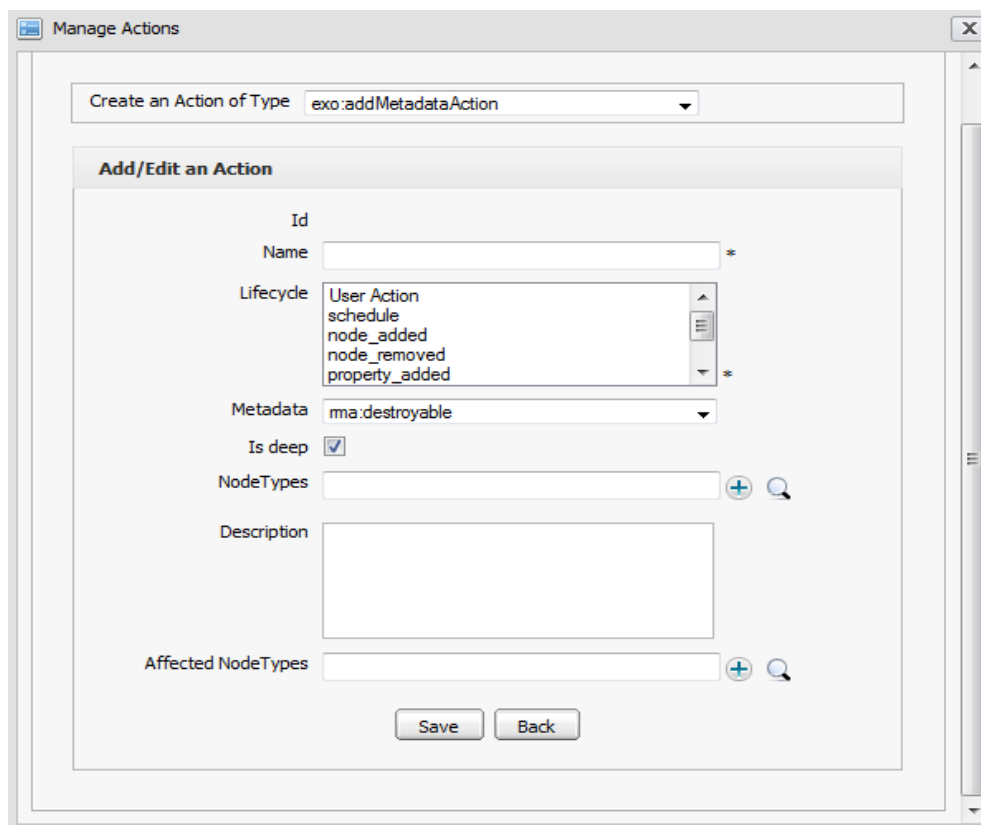
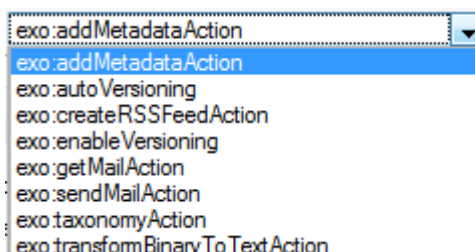


Illustration 101: The Add Action tab in the Manage Actions form

**Step 5:** Select the type of an action in list by clicking the  icon:



Details:

|                                |                              |
|--------------------------------|------------------------------|
| <b>exo:action</b>              | the action is not supported  |
| <b>exo:AddMetadataAction</b>   | to add metadata              |
| <b>exo:autoVersioning</b>      | to automatically add version |
| <b>exo:createRSSFeedAction</b> | to create a RSS file         |
| <b>exo:enableVersioning</b>    | 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 the **Save** button.

All actions of node are listed in the **Available Actions** tab

After adding an action to a node, all child nodes of this node will have this action in their menu.



*Only some actions are shown in menu, others will be performed immediately you add that action successfully and do a action defined in the 'Lifecycle' field.*

*Example: If you add an action named 'Send mail' to node A then all child nodes this node will also have this action. To check, right click these child nodes to see this action in menu.*

## b) View an action

Do the following steps to view an action:

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

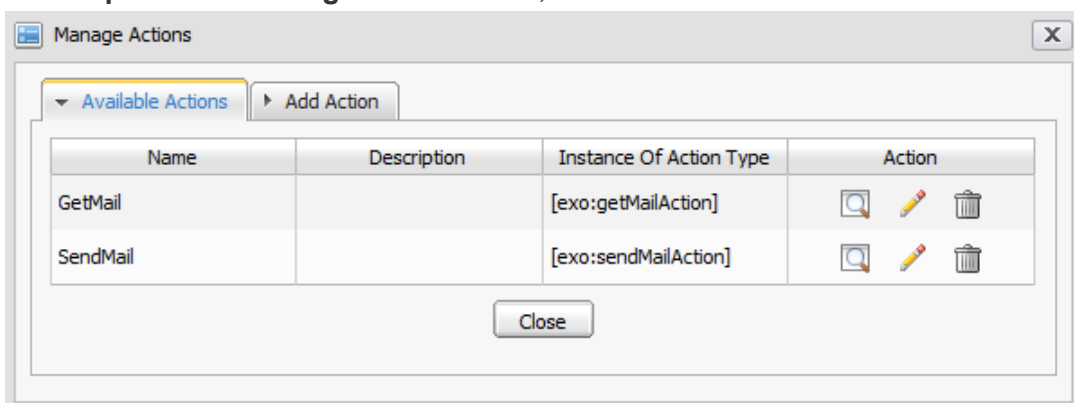



Illustration 102: The Available Actions tab in the Manage Actions form

**Step 2:** Click the  icon corresponding to an action that you want to view. Information of this action will appear in the **Action info** tab:

The 'Manage Actions' dialog box has three tabs: 'Available Actions', 'Add Action', and 'Action info'. The 'Action info' tab is selected, showing a form with the following fields and values:

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

A 'Cancel' button is located at the bottom right of the form.







Illustration 103: The Action info tab in the Manage Actions form

### c) Edit an action


Do the following steps to edit an action:

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

The 'Manage Actions' dialog box has three tabs: 'Available Actions', 'Add Action', and 'Action info'. The 'Available Actions' tab is selected, showing a table with the following data:

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

A 'Close' button is located at the bottom center of the dialog.

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

The screenshot shows a web application window titled "Edit action". Inside, there is a form titled "Action form". The form contains the following fields and controls:

- Id:** A text input field containing "GetMail".
- Name:** A text input field containing "GetMail", followed by an asterisk (\*).
- Lifecycle:** A dropdown menu with "User Action" selected. Other options visible are "schedule", "node\_added", "node\_removed", and "property\_added". It is followed by an asterisk (\*).
- Protocol:** A dropdown menu with "pop3" selected.
- Host:** An empty text input field.
- Port:** An empty text input field.
- Folder:** A text input field containing "Inbox".
- User Name:** A text input field containing "support@exoplatform.com".
- Password:** An empty text input field.
- Is deep:** A checkbox that is checked.
- NodeTypes:** A text input field with a "+" icon and a magnifying glass icon to its right.
- Description:** A text input field at the bottom, partially visible.

Illustration 104: The Edit action form

**Step 3:** Edit the properties in this form.

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

#### d) Delete an action

To delete an action, do as follows:

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

**Step 2:** Click the  icon corresponding to the action that you want to delete

**Step 3:** Click the **OK** button on the confirmation message to accept deleting or click the **Cancel** button to quit.


#### 3.3.7.6 View Node Properties

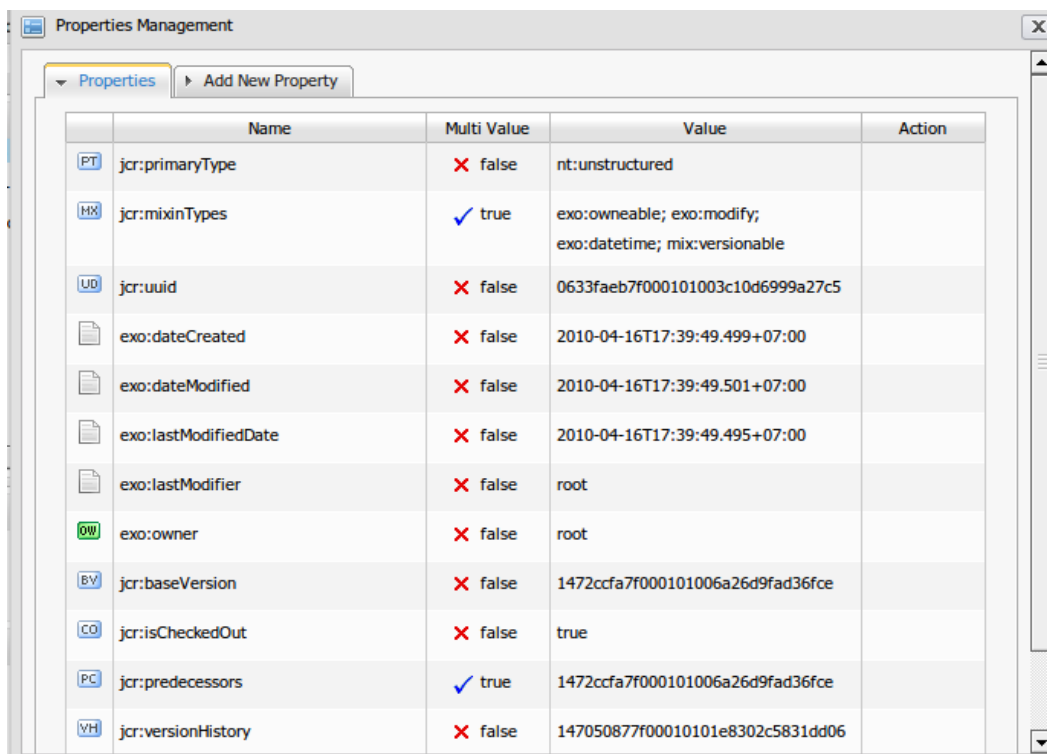
This function allows you to view all properties and values of a node. In addition, it also allows adding more properties for the node.

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 the  View Node Properties to show the **Properties Management** form:



The screenshot shows the 'Properties Management' window with two tabs: 'Properties' (selected) and 'Add New Property'. The 'Properties' tab displays 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;<br>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                           |        |

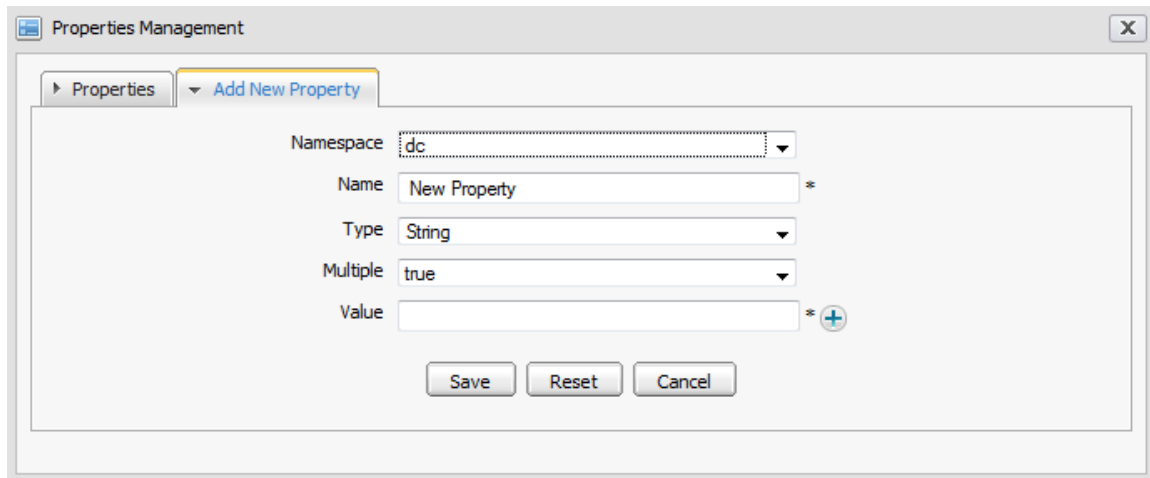
Illustration 105: The Properties Management form

Details:

|                             |   |
|-----------------------------|---|
| <b>Properties tab</b>       | displaying all properties and values of a node. |
| <b>Add new property tab</b> | to add more properties for the node.            |

**Step 4:** To add new properties, you move to the **Add new property** tab:





The screenshot shows the 'Properties Management' dialog box with the 'Add New Property' tab selected. The form contains the following fields and controls:

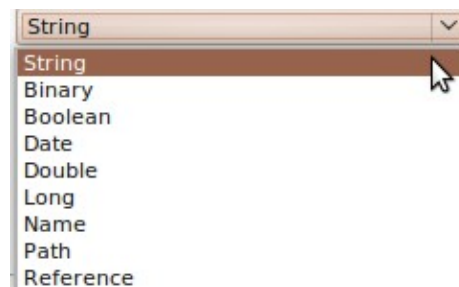
- Namespace:** A dropdown menu with 'dc' selected.
- Name:** A text input field containing 'New Property'.
- Type:** A dropdown menu with 'String' selected.
- Multiple:** A dropdown menu with 'true' selected.
- Value:** A text input field with an asterisk (\*) and a plus (+) icon to its right.
- Buttons:** 'Save', 'Reset', and 'Cancel' buttons at the bottom.



Illustration 106: 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.

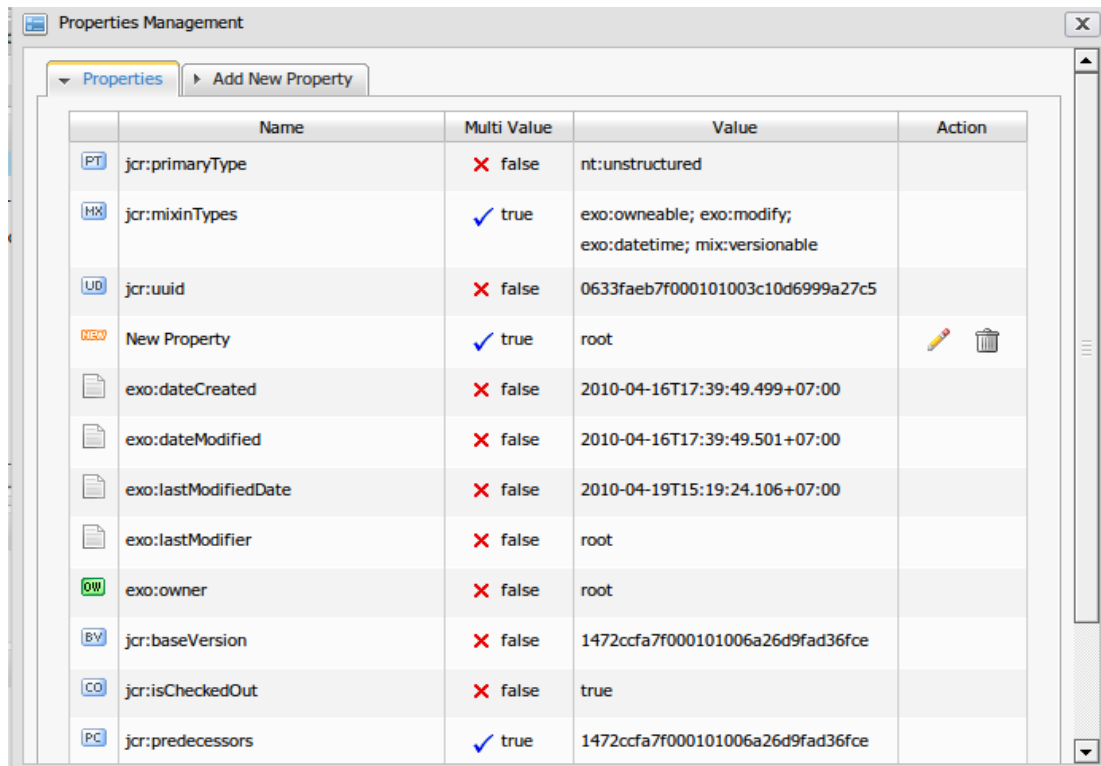
**Step 7:** Select a type for a property:



**Step 8:** Input a value for this property. Click the  icon to add more values for this property or click the  icon to delete this value.

**Step 9:** Click the **Save** button to accept the inputted values or click the **Reset** button to clear inputted values.

After adding a new property for a node, you will be redirected to the **Properties** tab that lists all properties of this node:



In this tab, you can:

Edit the added property by clicking the icon in the Action column.

Or delete the added property by clicking the icon.

### 3.3.7.7 Export nodes

This function is used to export a node into .xml or zip file

Do as follows:

**Step 1:** Select a node that you want to export.

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

**Step 3:** Click on the Action bar to show the **Export Node** form:

Path to Export: /nt

Format: ☒ Document view ☐ System view

Zip: ☐

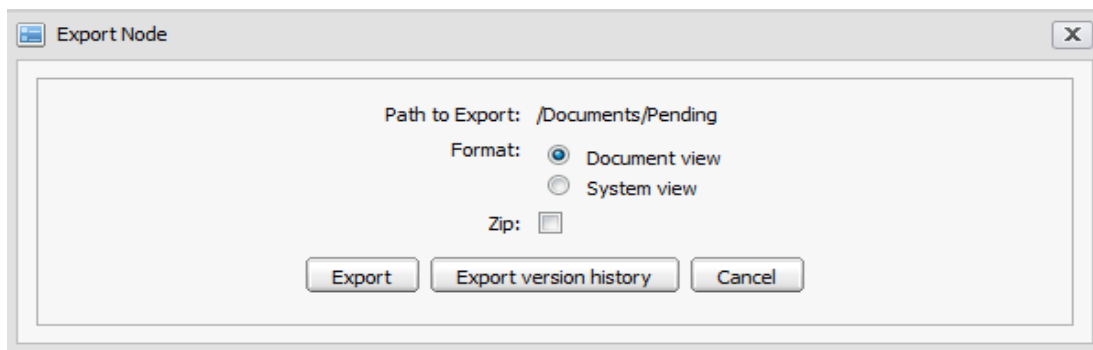
Illustration 107: The Export Node form

Details:

|                       |   |
|-----------------------|---|
| <b>Path to Export</b> | the path of a node to export  |
| <b>Format</b>         | the format of the node  |
| <b>Document View</b>  | each node is a tag and properties of that node are considered to be elements of that tag. |
| <b>System view</b>    | each node and each property of that node is included in a different tag                   |
| <b>Zip</b>            | a node will be exported in zip type   |

**Step 4:** Click the **Export** button 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** button. It allows to export the history of current node and its children.

### 3.3.7.8 Import nodes

This function is used to import the nodes in xml format into JCR Explorer system.

Do the follows:

**Step 1:** Select the location that you want to import a node.

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



**Step 3:** Click the  **Import Node** button. The **Import Node** form will be displayed:

Illustration 108: The Import Node form

**Step 4:** Click the **Browse** button to select a file you want to import.

**Step 5:** Click the  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  icon to upload the selected file.

**Step 8:** Select a format in the **Format** field.

**Step 9:** Click the **Import** button to complete importing a file.

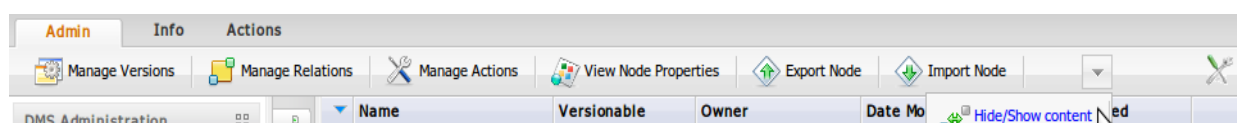
### 3.3.7.9 Hide/Show content


This function is used to hide or show node

To hide node, do the following steps:

**Step 1:** Select the node that you want to hide

**Step 2:** Select the **Admin** tab

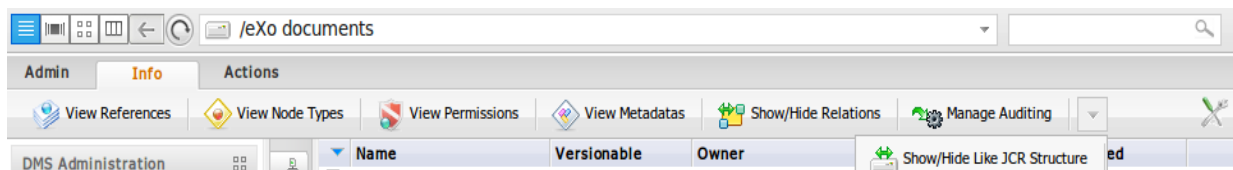


**Step 3:** Click the  button on the Action bar to hide a node. A pop-up message will appear to inform that you added hidden node successfully!

**Step 4:** To show a node, click the  button again.

### 3.3.8 Info

This tab provides actions that are used to manage the node's information such as view reference, view node type, view properties, etc

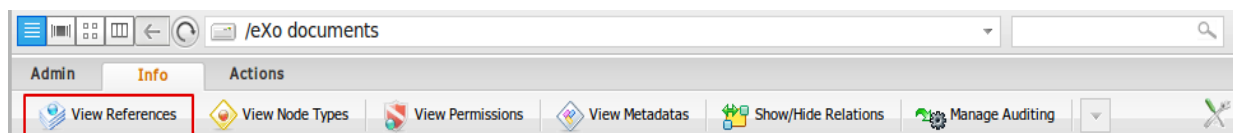


#### 3.3.8.1 View Referenced documents


Do the following steps to view referenced documents:

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

**Step 2:** Select the **Info** tab to show the **View References** action.



**Step 3:** Select a category

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

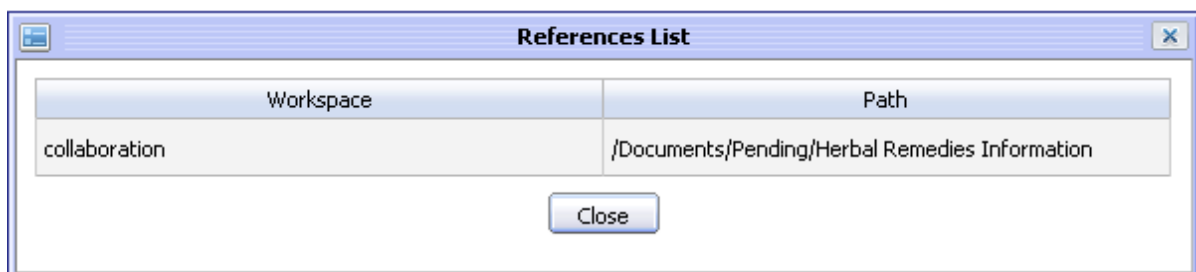


Illustration 109: The References List Form

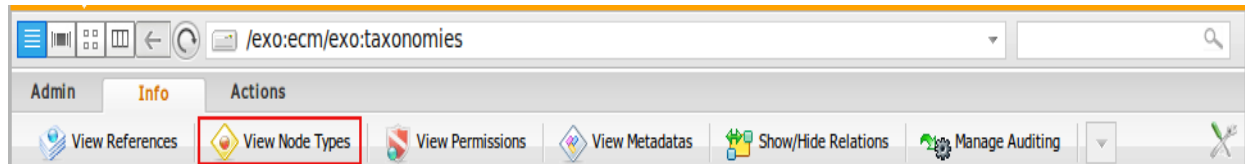
### 3.3.8.2 View Node Types

This function is used to view detail information of a node.

Do as follows:

**Step 1:** Select a node that you want to view node types

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



**Step 3:** Click the  to view detail information of the selected none.

The **Node type information** form appears:

Node Type Information

exo:article | exo:modify | exo:datetime | exo:owneable | mix:votable | mix:commentable

| Name        | Primary Item Name | Parent types                                   | Mixin Node Type                           | Orderable Children                        |
|-------------|-------------------|--|---|---|
| exo:article | N/A               | mix:referenceable<br>exo:rss-enable<br>nt:base | <input checked="" type="checkbox"/> false | <input checked="" type="checkbox"/> false |

**Node Property Definition**

| Name            | Type   | Man                                       | Pr  | AC  | Mul                                       | DV | CV |
|-----------------|--------|---|---|---|---|----|----|
| jcr:uuid        | String | <input checked="" type="checkbox"/> true  | <input checked="" type="checkbox"/> true  | <input checked="" type="checkbox"/> true  | <input checked="" type="checkbox"/> false |    |    |
| exo:text        | String | <input checked="" type="checkbox"/> false | <input checked="" type="checkbox"/> false | <input checked="" type="checkbox"/> false | <input checked="" type="checkbox"/> false |    |    |
| exo:summary     | String | <input checked="" type="checkbox"/> false | <input checked="" type="checkbox"/> false | <input checked="" type="checkbox"/> false | <input checked="" type="checkbox"/> false |    |    |
| exo:title       | String | <input checked="" type="checkbox"/> true  | <input checked="" type="checkbox"/> false | <input checked="" type="checkbox"/> false | <input checked="" type="checkbox"/> false |    |    |
| jcr:mixinTypes  | Name   | <input checked="" type="checkbox"/> false | <input checked="" type="checkbox"/> true  | <input checked="" type="checkbox"/> false | <input checked="" type="checkbox"/> true  |    |    |
| jcr:primaryType | Name   | <input checked="" type="checkbox"/> true  | <input checked="" type="checkbox"/> true  | <input checked="" type="checkbox"/> true  | <input checked="" type="checkbox"/> false |    |    |

**Child Node Definition**

| Name | OPV  | MAN                                       | PR  | AC  | DNT         |
|------|------|---|---|---|-------------|
| *    | COPY | <input checked="" type="checkbox"/> false | <input checked="" type="checkbox"/> false | <input checked="" type="checkbox"/> false | exo:article |

Close

Illustration 110: The Node Type Information form

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

### 3.3.8.3 View Permissions


This function allows Administrator to establish the right for each node.

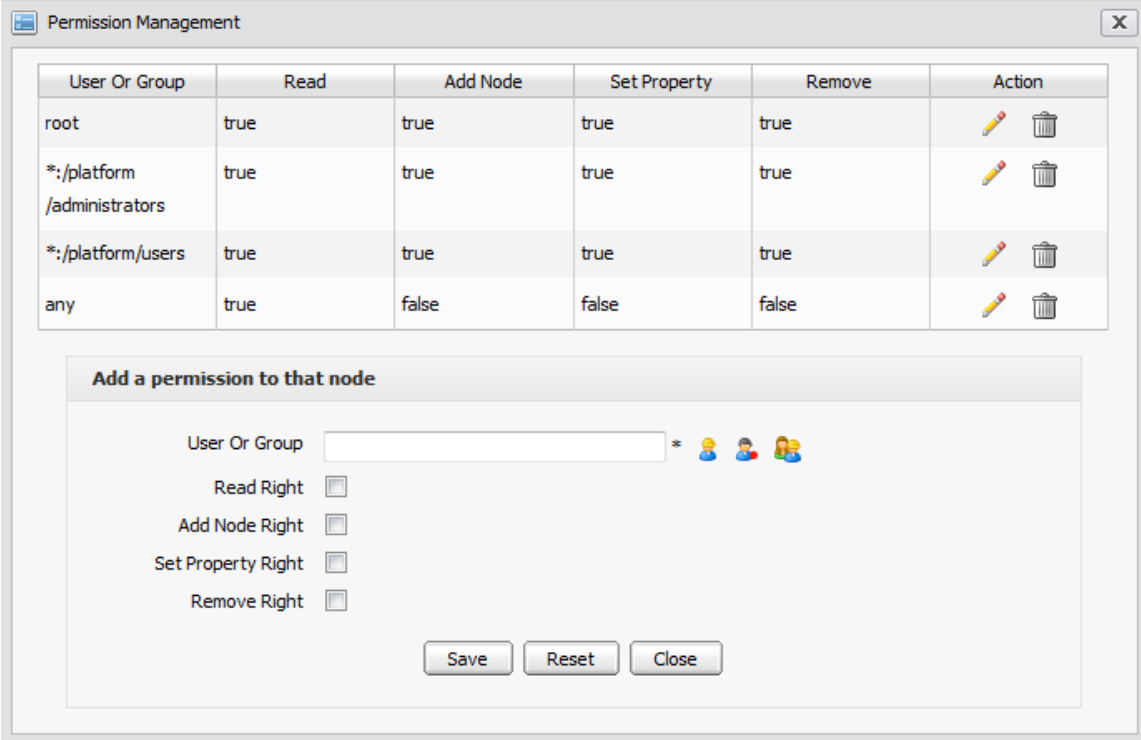
#### a) View permissions of a node

To view permissions of a node, do as follows:









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

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




**Step 3:** Click the  View Permissions on the Action bar to show the **Permission Management** form:



The screenshot shows a 'Permission Management' window with a table of permissions and a form to add new permissions.

| User Or Group                  | Read | Add Node | Set Property | Remove | Action  |
|--------------------------------|------|----------|--------------|--------|---|
| root                           | true | true     | true         | true   |       |
| *:/platform<br>/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 111: The Permission Management form

In this form, you can view the current permission of the selected node. In addition, you also can add rights for another users/ groups if you want.


#### b) Add permission for a node

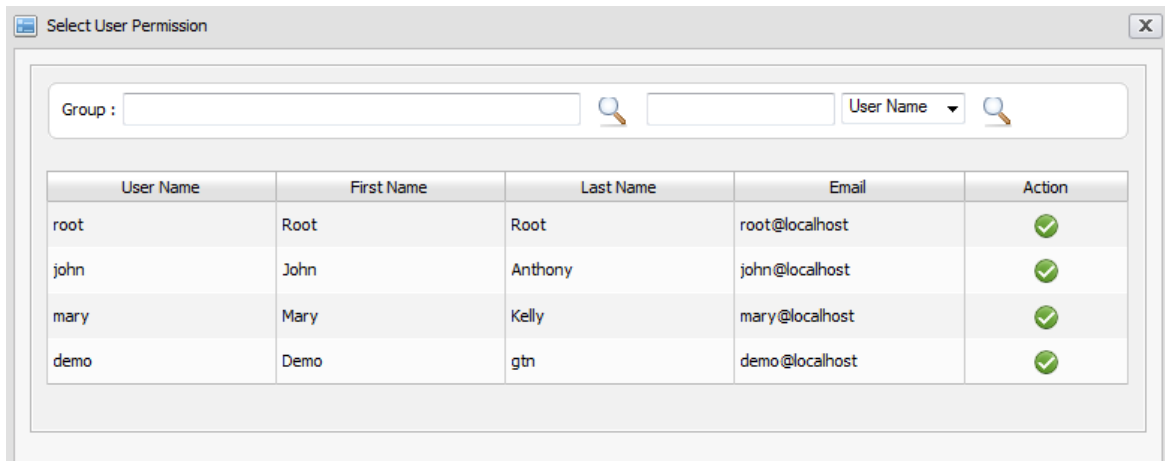
Do the following steps to add permission for a node:

**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:









| 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 112: Select User Permission form

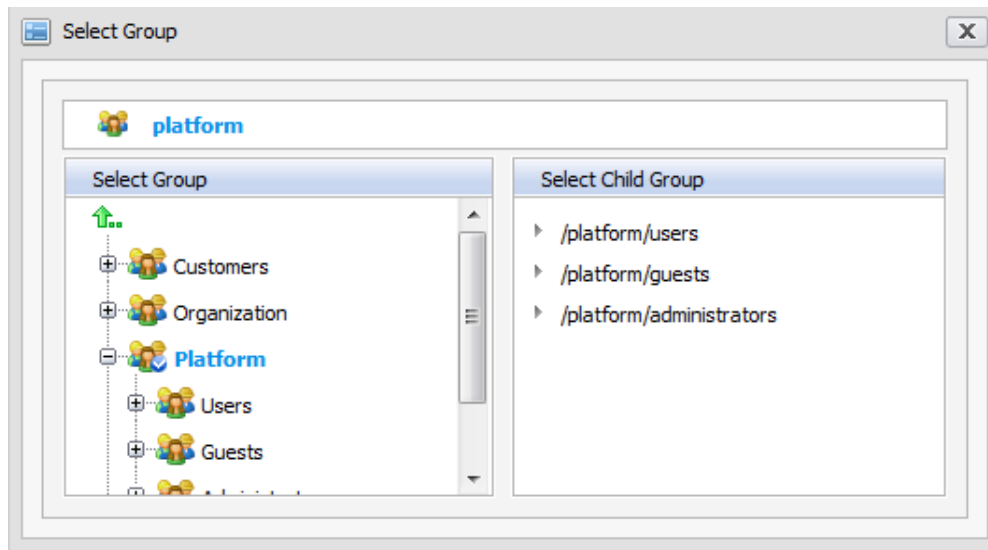
**Step 5:** Click the  icon to select users in the list.

To select users in a specific group, there are two ways:

**The 1<sup>st</sup> way:**


1. Enter the group name in the **Group** field. For an example, you can enter a group named **/platform/users** and then press **Enter** key. All users in this group are listed in a table below.
2. Click the  icon next to the **Group** field to open the **Select Group** form that is used to select a group with a specific child group:







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 2<sup>nd</sup> 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 the  icon to show matched users in the table under.

**Step 6:** Show the **Select membership** form by clicking the  icon 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 the **Save** button to accept inputted values. The new added permission is listed in the table above.

### c) Edit permissions of a node


To edit permission of node, do as the following steps:

**Step 1:** Select a node that you want to edit permission .

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

**Step 3:** Click the  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 the **Save** button to finish editing.


### d) Delete permissions of a node

To delete permissions of a node,do as follows:

**Step 1:** Select a node that you want to remove permissions.

**Step 2:** Select the **Info** tab on the Action bar.

**Step 3:** Click the  button to open '**Permission Management**' form.

**Step 4:** In the row of the permission you want to delete, click the  icon.

**Step 5:** Click the **OK** button on the confirmation message to accept removing this permission or click the **Cancel** button to quit without deleting.

### 3.3.8.4 View Metadata

This function allows you to view or add metadata of a node with the node type is nt:file such as: File, Podcast, child node of File Plan and uploaded file.

Do as follows:

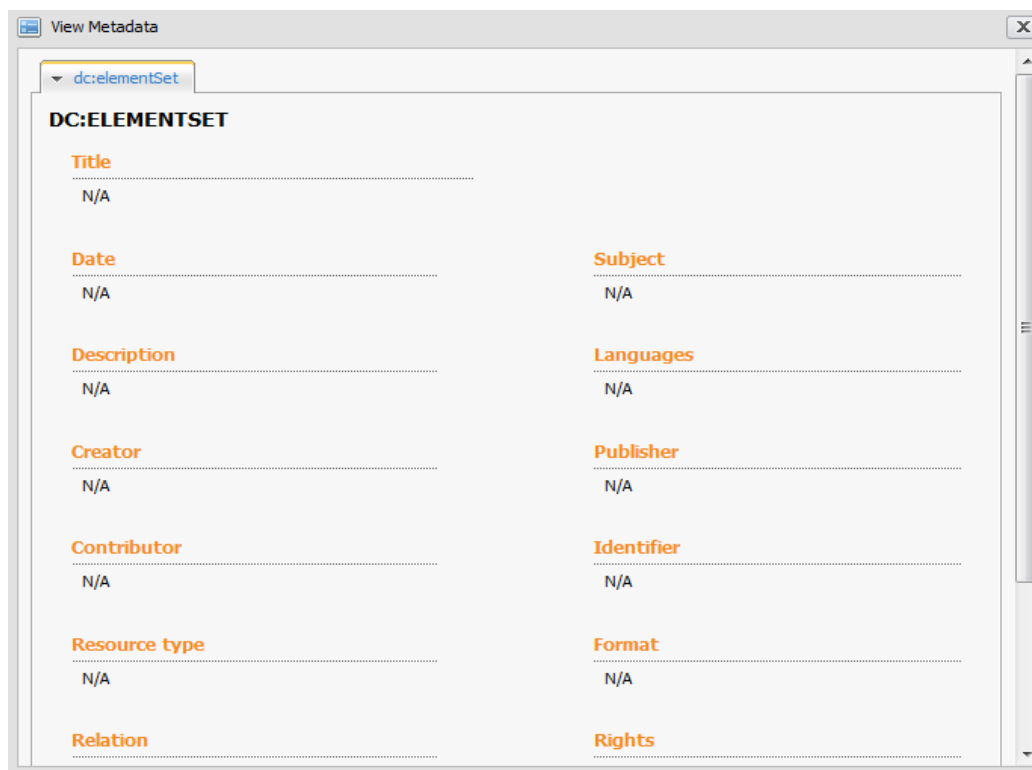
**Step 1:** Select a nt:file node

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

**Step 3:** Click the



to open the **View Metadata** form:

A screenshot of the "View Metadata" form. The window title is "View Metadata". Inside, there's a tab labeled "dc:elementSet". Below the tab, the text "DC:ELEMENTSET" is displayed. The form contains two columns of metadata fields, each with a label in orange and a value "N/A" below it. The left column fields are: Title, Date, Description, Creator, Contributor, Resource type, and Relation. The right column fields are: Subject, Languages, Publisher, Identifier, Format, and Rights. A vertical scrollbar is on the right side of the form area.

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

Illustration 113: 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.

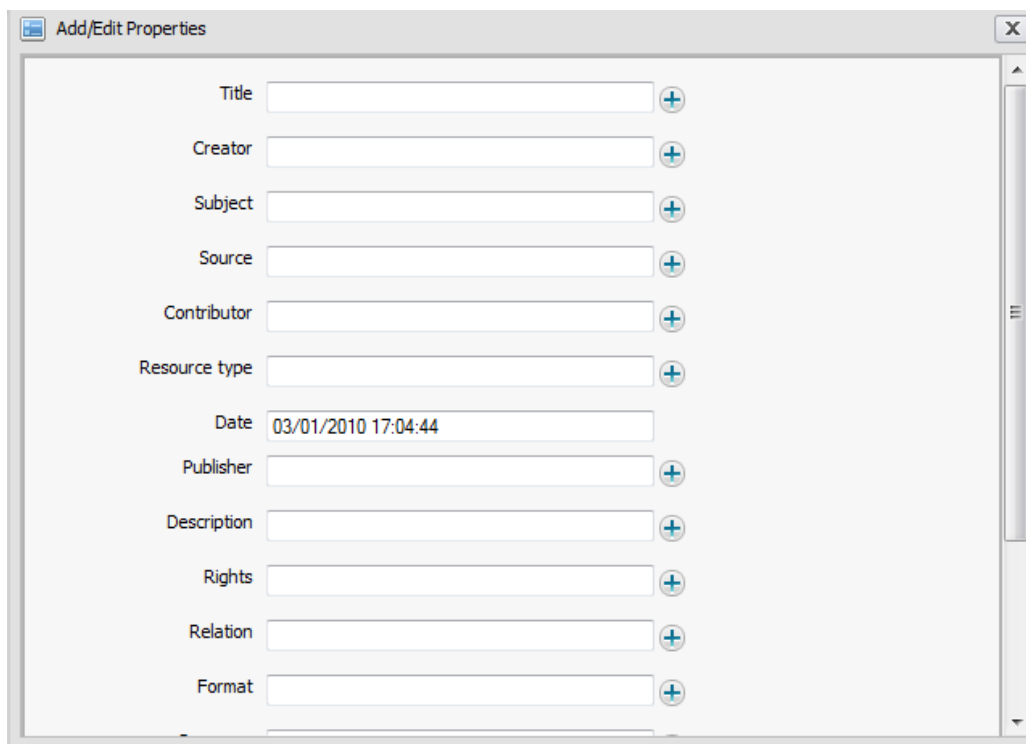



Illustration 114: The Add/Edit Properties form

**Step 5:** Fill out values in this form that you want to add metadata. Click the  icon to add more metadata.


**Step 6:** Click the **Save** button to accept the inputted values.

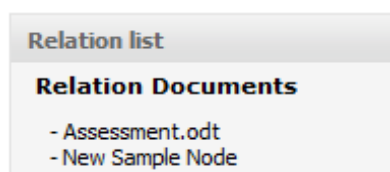
### 3.3.8.5 Show/Hide Relations

This function is used to show relation documents of a node. Do as the following steps to show/hide relations:

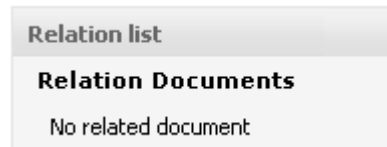
**Step 1:** Select a node that you want to view relations

**Step 2:** Select the **Info** tab on the **Action** bar.

**Step 3:** Click the  Show/Hide Relations to show relations. The relations of the node will be displayed in the sidebar:



If the node does not have any relation document, in sidebar, it shows “**No related document**” like:



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

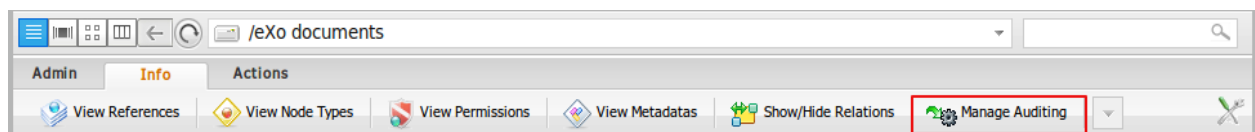
### 3.3.8.6 Manage Auditing


This function supports you to log property changes of a node. It helps you manage and view changes of a node better and effectively.

Do as follow:

**Step 1:** Select a node (on the left or right panel) that you want to manage auditing.

**Step 2:** Select the Details view and the **Info** tab to show some actions on the **Action** bar.



**Step 3:** Activate the selected node by clicking the  Manage Auditing on the Action bar. The Activate Auditing form will appear:

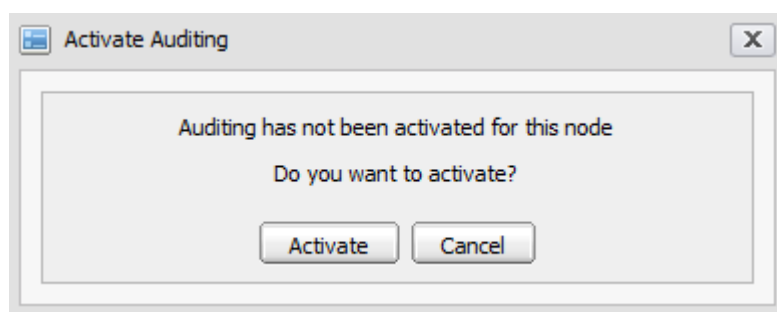



Illustration 115: The Activate Auditing form

**Step 4:** Click the **Activate** button to accept activating the selected node.

**Step 5:** Click the  Manage Auditing button again to view auditing information of the selected node.

If the selected node has no property change, the **Auditing Information** form will show:

The screenshot shows a window titled "Auditing Information" with a close button (X) in the top right corner. Inside the window is a table with four columns: "Operation", "User name", "Date", and "Version". The table is currently empty, and the text "Empty data" is displayed in red in the center. Below the table is a "Close" button.

**Illustration 116: The Auditing Information form**

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

The screenshot shows a window titled "Auditing Information" with a close button (X) in the top right corner. Inside the window is a table with four columns: "Operation", "User name", "Date", and "Version". The table contains two rows of data:

| Operation        | User name | Date                | Version    |
|------------------|-----------|---------------------|------------|
| Property changed | root      | 03/01/2010 17:11:50 | No version |
| Property changed | root      | 03/01/2010 17:12:43 | No version |

Below the table is a "Close" button.

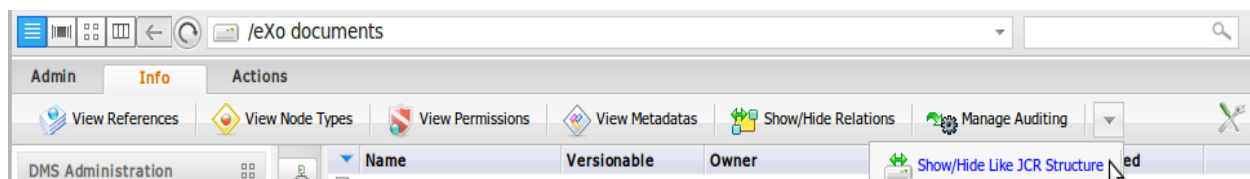
### 3.3.8.7 Show/Hide Like JCR Structure

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

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

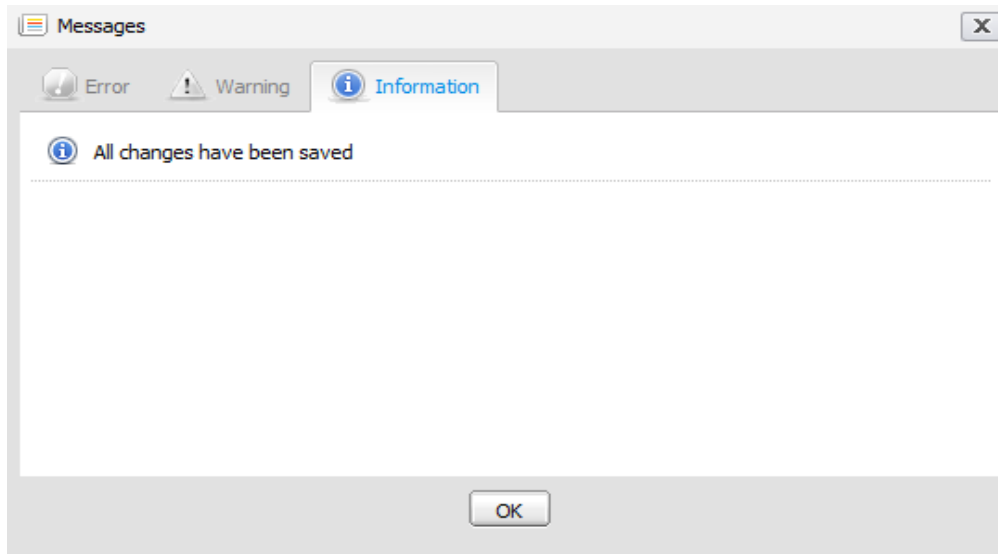
**Step 1:** Select a document that you want to show like JCR Structure

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



**Step 3:** Click the  to show JCR Structure.

**Step 4:** Click the  icon to save. There will be a message that informs:



- ✓ To hide JCR Structure:

**Step 1:** Click the selected document above.

**Step 2:** Click the  again.

## 3.4 Manage Site Content by WebDAV

### 3.4.1 What is WebDAV?

**WebDAV** abbreviates for **Web** – based **D**istributed **A**uthoring and **V**ersioning which is used to publish and manage files and directories on the remote web server. Also, it allows groups of users to collaboratively perform these functions on a website.

WebDAV provides the following features:

- **Locking:** This function is to prevent the possibility of two or more collaborators overwriting their shared files.
- **Site manipulation:** WebDAV supports copy and move actions and the creation of 'collections' (e.g. File system directories).
- **Name space management:** This function enables you to copy and move Web pages within server's namespace.

### 3.4.2 Why you should use WebDAV?

You should use WebDAV to manage site content because of the following reasons:

- You can copy/paste a web content, folders/documents/media, etcon your desktop that will mirror your host – based site. WebDAV enables people to read and write documents over the web.
- Easily, quickly and flexibly manipulate actions on your site without directly accessing a site by using browsers. Files can be accessed from anywhere and are stored as in a local directories.
- Specially you don't have to waste time for waiting to upload many pictures/documents into your site, you just need to copy those pictures and then paste all of them to the folder of the web content that you want.

### 3.4.3 How to use WebDAV in eXo WCM?

**eXo WCM** supports two ways to use WebDAV in sites management. Do the following steps:

**The 1<sup>st</sup> 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:



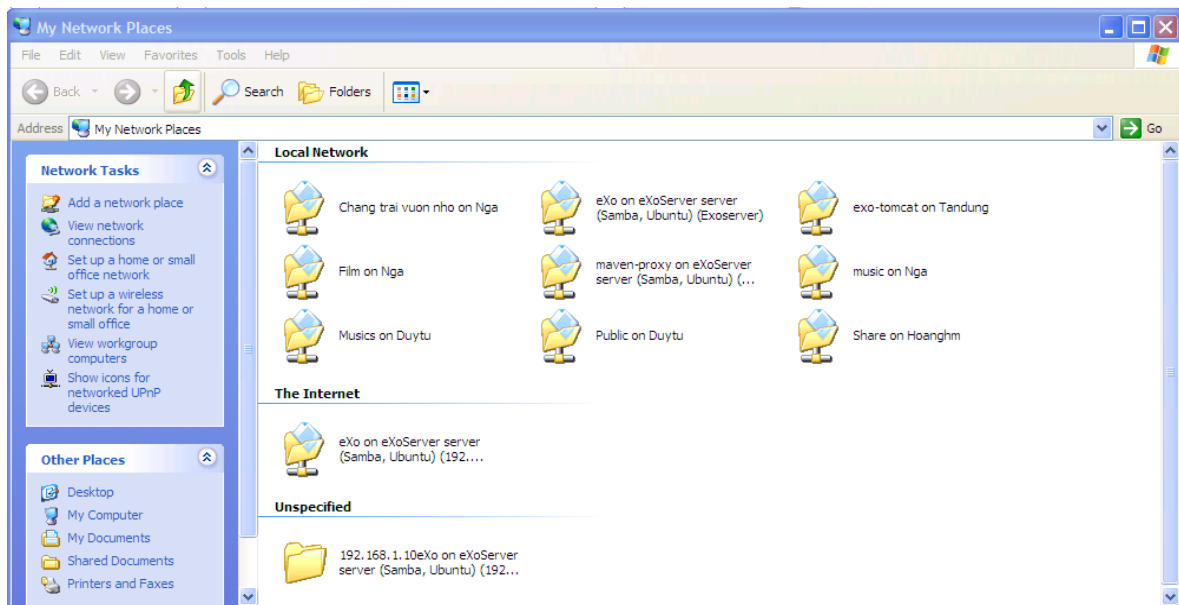


Illustration 117: Shared folders in My Network Places

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:

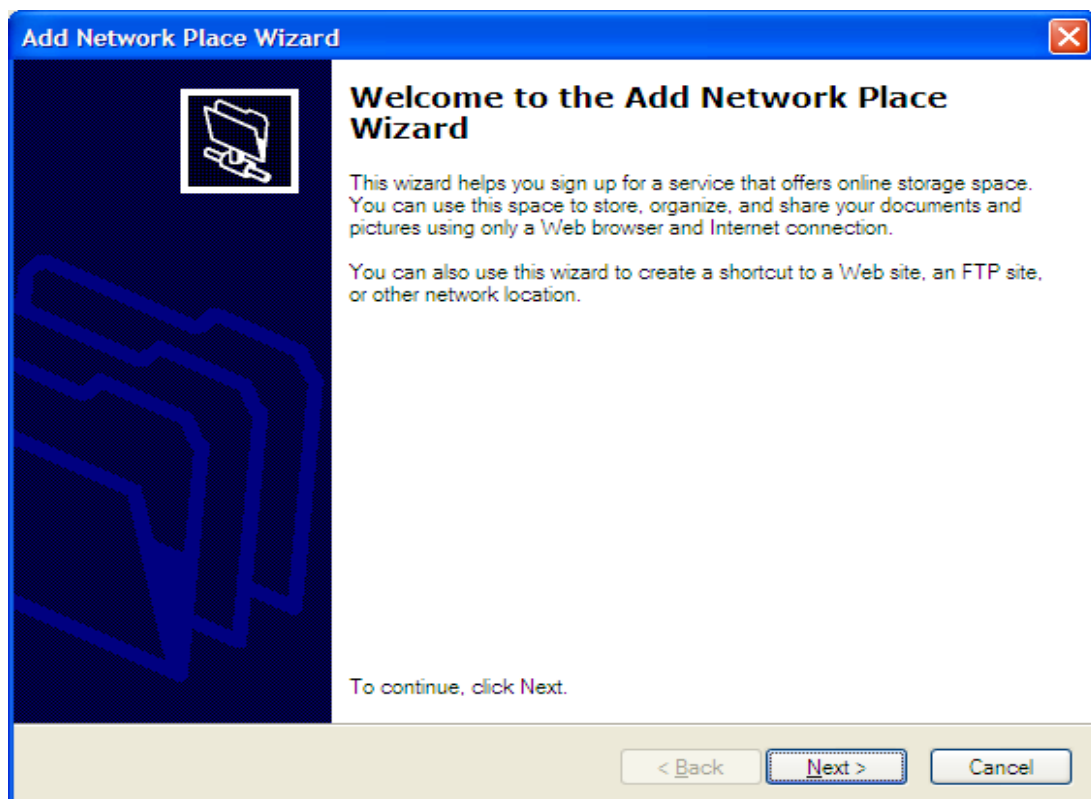


Illustration 118: The Add Network Place Wizard form

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

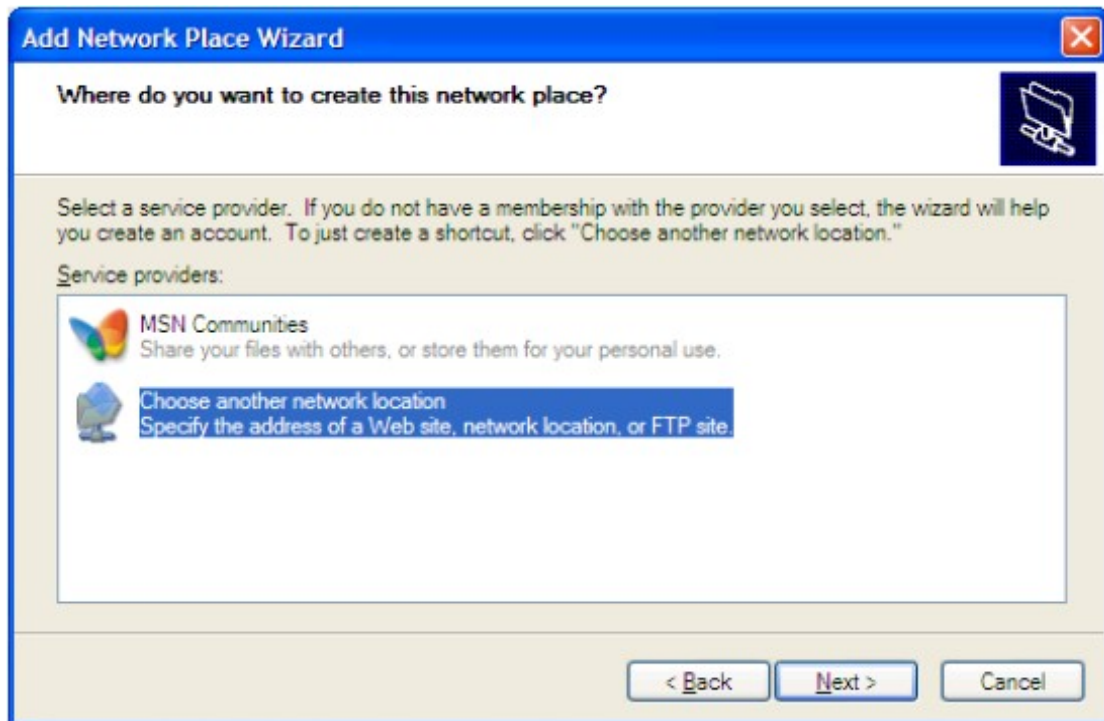


Illustration 119: The Add Network Place Wizard form

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 the **Next** button 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.

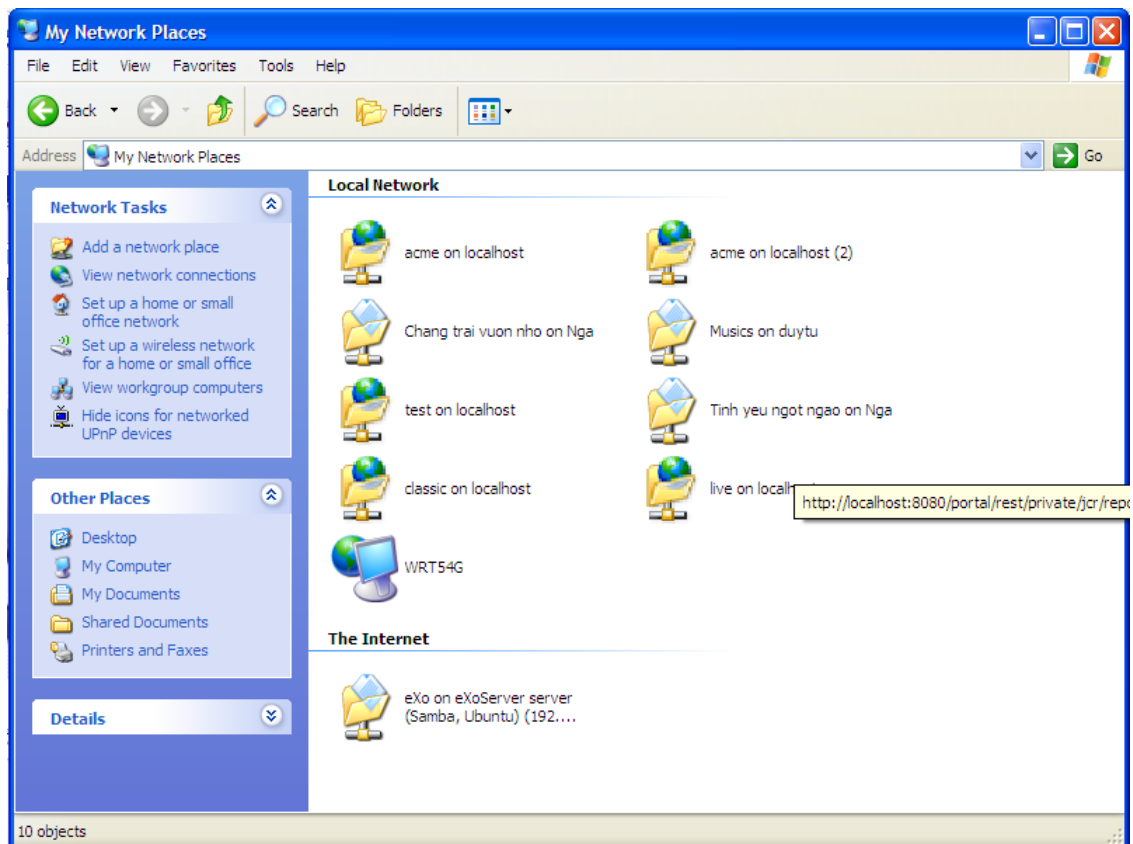


Illustration 120: My Network Places folder

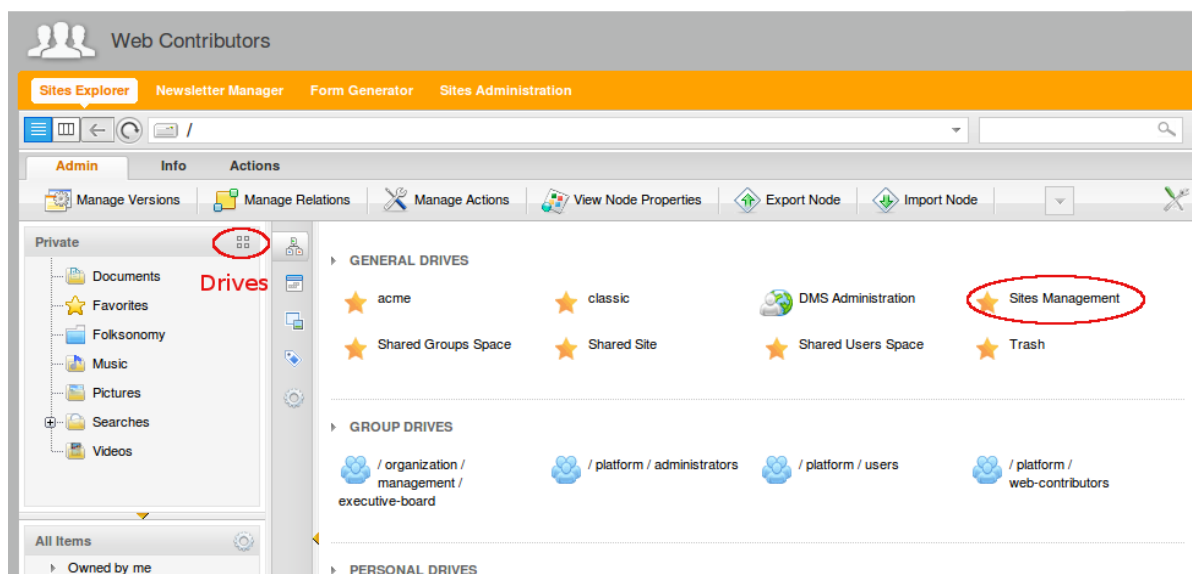
Go into the folder corresponding to the site which you want to take actions on it.

**The 2<sup>nd</sup> way:**

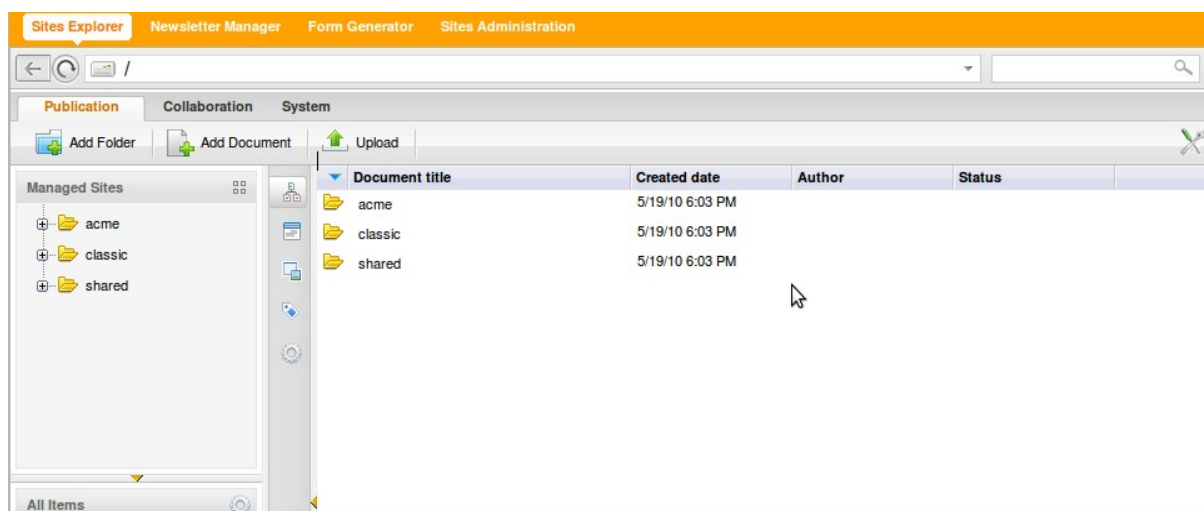
**Step 1:** Using IE (Internet Explorer) browser to access <http://localhost:8080/portal>

**Step 2:** Select the following path: **Group**→ **Sites Explorer** page on the Administration bar.

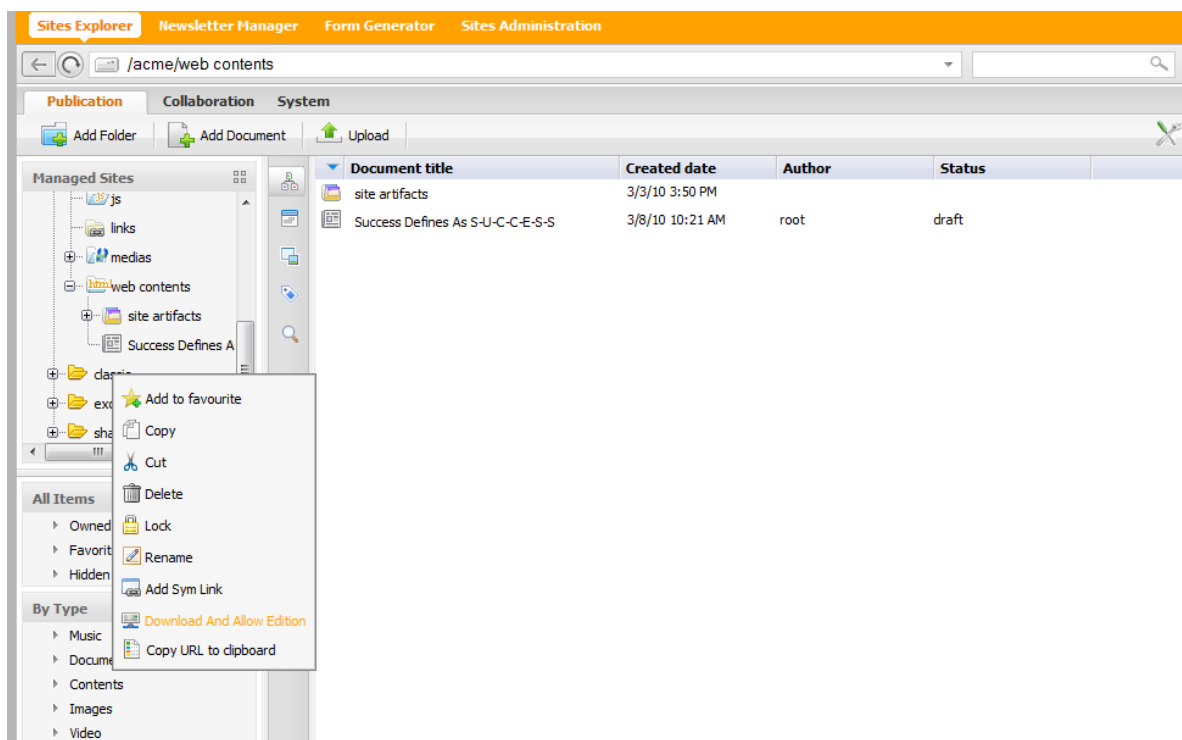
**Step 3:** Go to **Drive** → Select **Sites Management** drive.



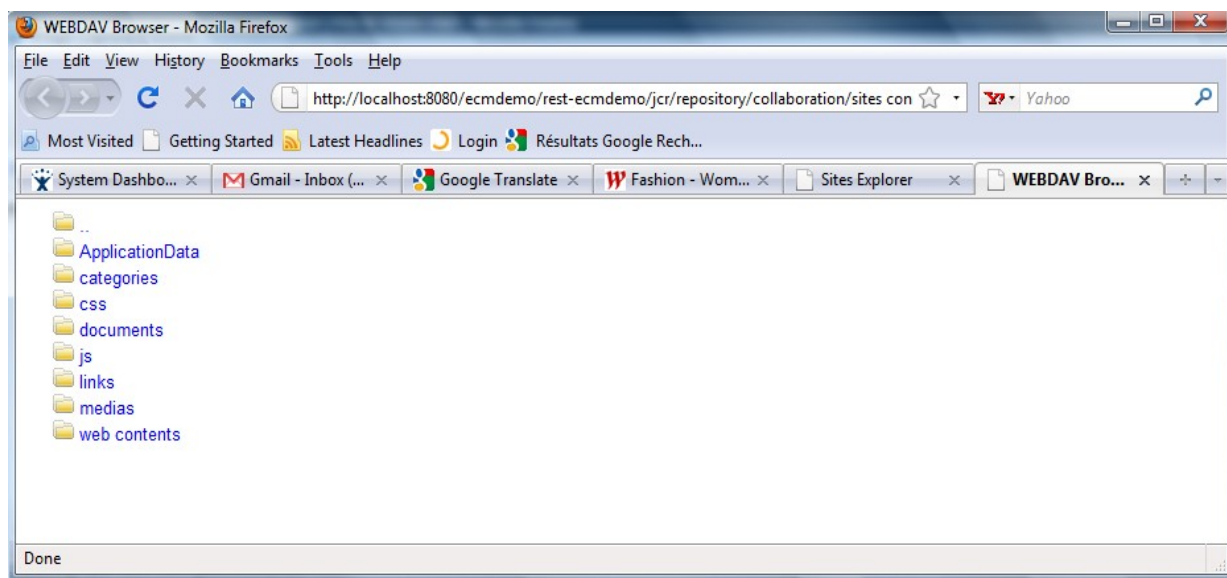
You will see all sites listed on the left panel like illustration below.



**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 121: The Default folders of a site in WebDAV view**

### 3.4.4 Actions

Access into a site by WebDAV view, you also see all *default folders* of a site normally. Manipulating on WebDAV is like manipulating on folders. It means that you also can copy/paste, list folders, rename, etcas for system directories.

#### 3.4.4.1 Add a new web content into a specific site

This function is used to copy a web content (such as a .html file or a web content) from your local computer to 'web content' folder of a site.

Do the following steps:

**Step 1:** Access into a site by WebDAV and then go to **web content** folder of this site.

**Step 2:** Copy a web content file on your local computer and then paste to this folder. The copied file will be converted to web content automatically that is viewed by WebDAV. It means that copied web content is also a folder containing default folders: CSS, documents, js, media.

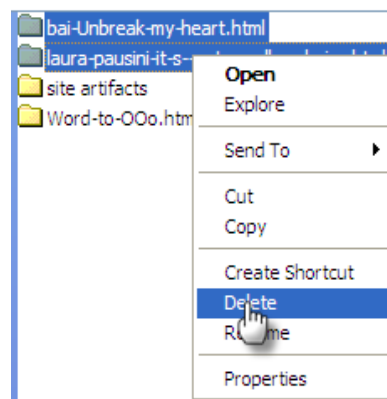
After adding a new web content successfully, you can view it as a folder by WebDAV view or view it as a web site by using a browser.

#### 3.4.4.2 Delete a web content

This function supports webmasters to delete one or more web content at once.

**Step 1:** Go into the folder that contains web content that you want to delete.

**Step 2:** Then right-click a web content or more web content (keep Ctrl and select web content to select more web content at once) and select the **Delete** in the menu like deleting system folders and the selected folders will be removed from your site.



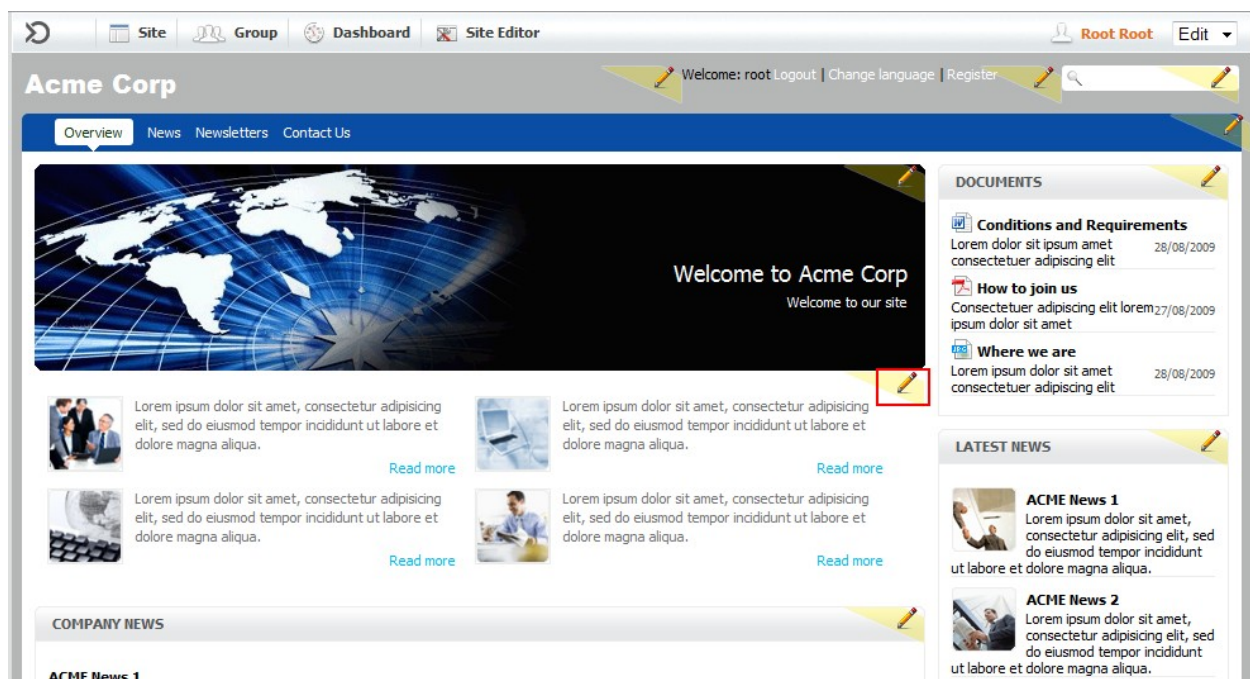
## 3.5 How to publish a site?


Besides publishing a web content in Sites Explorer, you also may use this function to publish a site to everyone or only some groups/users that you want. Use Content List Viewer – CLV to publish a web content.

CLV allows you to directly publish multiple content on the Overview page.

- ✓ To publish a site, do as follows:

**Step 1:** Turn on the **Edit** mode.



**Step 2:** Clicking on 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 122: The Content list viewer configuration form

Details:

|                           |  |
|---------------------------|--|
| <b>Mode</b>               | <p>This mode is to select web content for list viewer. There are two modes:</p> <ul style="list-style-type: none"> <li>By Folder: This mode allows you to select a content folder in the <b>Folder path</b> field.</li> <li>By Content: This mode allows you to select by the content in a specific folder in <b>Folder path</b> field.</li> </ul> |
| <b>Folder path</b>        | The path to a location of a folder that contains the content.  |
| <b>Order by</b>           | 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.   |
| <b>Header</b>             | The title for all content that are listed in List Viewer.  |
| <b>Viewer template</b>    | The template is used to view content list.   |
| <b>Paginator template</b> | The template is used to view each content in list.   |
| <b>Items per page</b>     | The number of items will be displayed per page.  |
| <b>Show image</b>         | The option is to show or hide the illustration of each published web content/document.   |
| <b>Show summary</b>       | The option is to show or hide the summary of each web content/document.  |



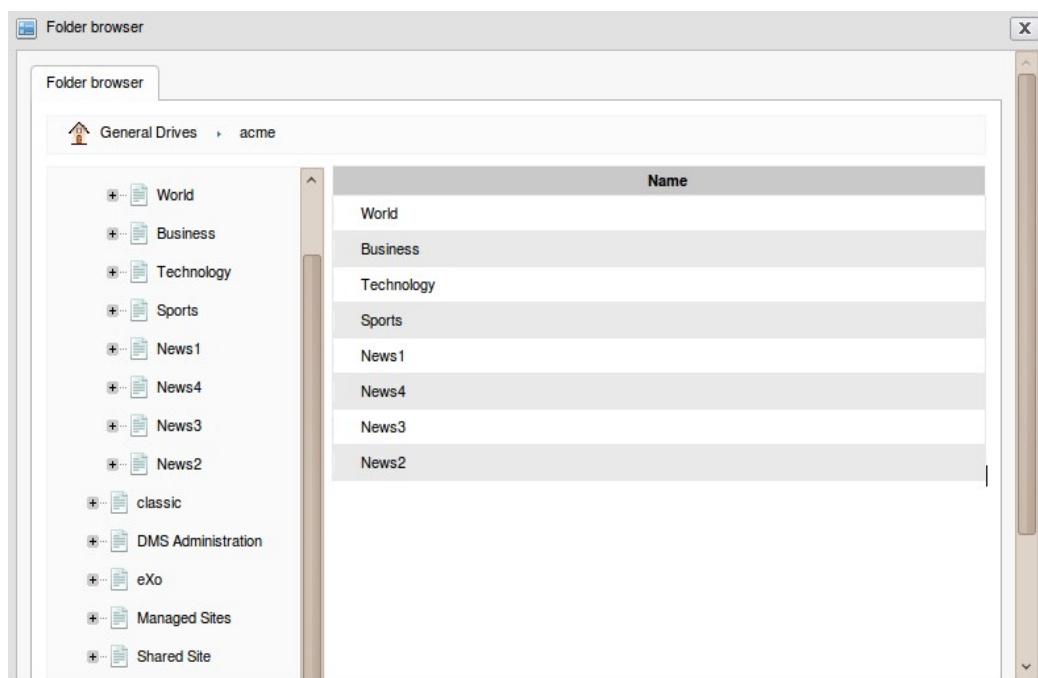
|                            |  |
|----------------------------|--|
| <b>Show header</b>         | The option is whether to show a header or not.   |
| <b>Show refresh button</b> | The option is whether to show the refresh button at the left bottom of this page or not.       |
| <b>Show title</b>          | The option is to show or hide title of each published web content/document.                    |
| <b>Show date created</b>   | The option is to show or hide the created date of each published web content/document.         |
| <b>Show link</b>           | The option is to show or hide the link of web content /document.                               |
| <b>Read more</b>           | The option is to show or hide the Read more to read all the content of a web content/document. |

**Step 3:** Browse the documents/ web content of an available site by clicking the  icon next to the folder path field.

**Step 4:**

- If you select the **By folder** mode:

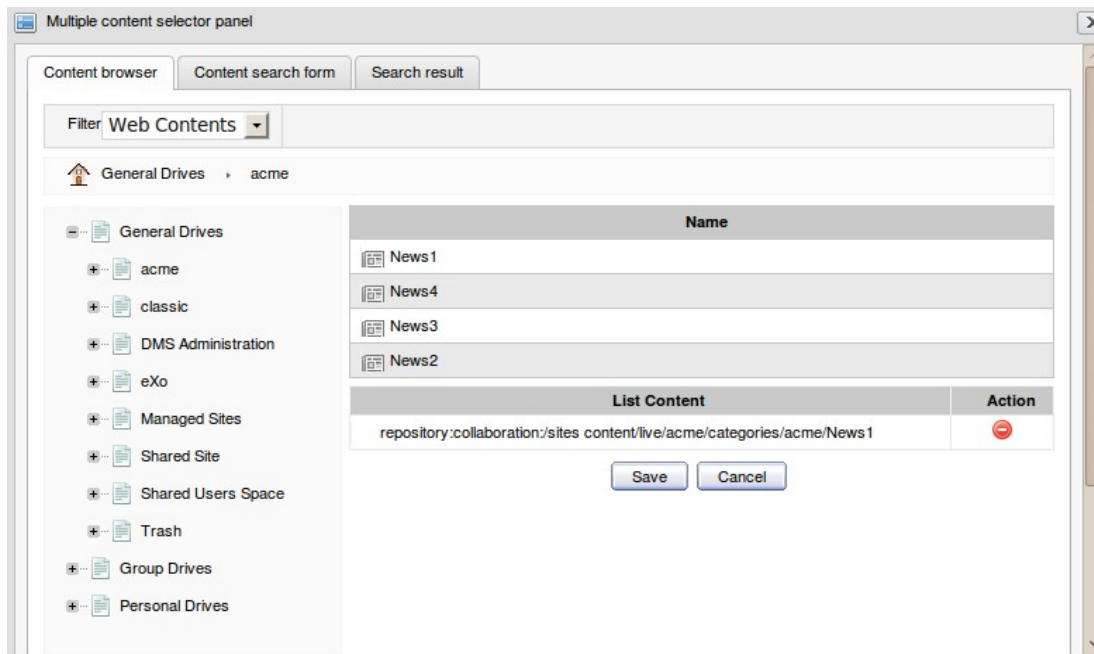
Select an available site on the left and then select a folder that contains content (documents/web content) on the right by clicking on it.



**Illustration 123:** 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 the **Save** button 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 on the **Edit**.*

*But if the **LIVE** mode is turned off, only the **PUBLICATION** versions are displayed.*

## 3.6 Newsletters

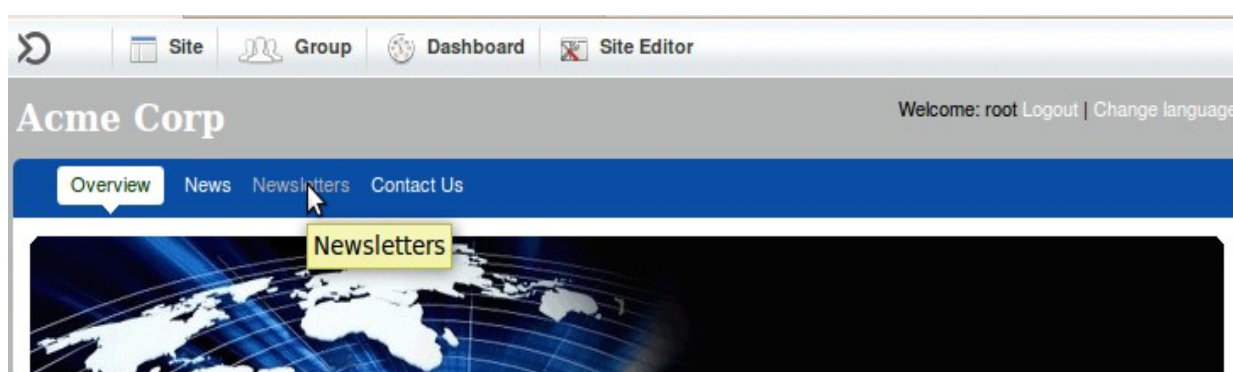
eXo WCM provides a newsletter service aiming at helping users quickly get the updated newsletters from a website.

### 3.6.1 Newsletter Viewer

Users instantly get newsletters from your email in order to update the newest information about categories and subscriptions that users frequently care about.

Follow these steps to subscribe to newsletters from exoservice:

**Step 1:** Go to **Newsletters** on the navigation bar. The Newsletters page will appear:



Overview News **Newsletters** Contact Us

**NEWSLETTERS**

Your Email  \*

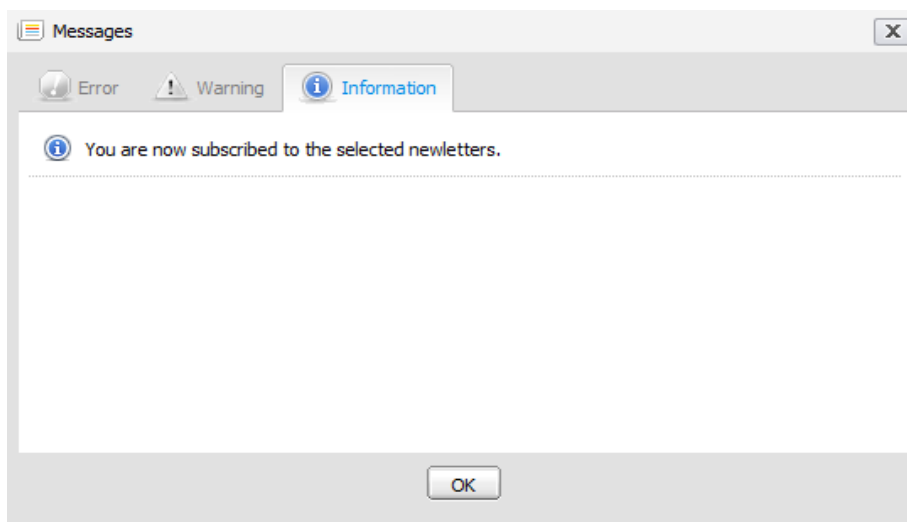
| Marketing  |                          |
|--|--------------------------|
| You want to know where we are, where we go ?             |                          |
| Subscription   | Check to subscribe       |
| <b>The market</b><br><i>What's on the market today ?</i> | <input type="checkbox"/> |

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

**Step 2:** Enter your email address for the **Your Email** field.

**Step 3:** Select the check box corresponding to the subscription that you want to get newsletters.

**Step 4:** Click the **Subscribe** button. A message will inform that you have just subscribed to the selected newsletter.



**Step 5:** Click the **OK** button in the confirmation message. You can reselect the subscription that you want or don't want to receive newsletters by re-selecting the check box in the **Check to subscribe** column.

A screenshot of the 'Newsletters' page in the eXo WCM & DMS interface. The page has a blue header with navigation links: 'Overview', 'News', 'Newsletters' (selected), and 'Contact Us'. Below the header is a banner image with a world map and the word 'NEWSLETTERS'. Under the banner, there is a section for 'Your Email' with the email address 'guynhlien.84@gmail.com' and a 'Forget this email' button. Below this is a table with two sections: 'Marketing' and 'General'. Each section has a 'Subscription' column and a 'Check to subscribe' column. The 'Marketing' section has one row for 'The market' with a checked checkbox. The 'General' section has two rows: 'Results' and 'Check-List', both with checked checkboxes. At the bottom of the page is a 'Change your subscriptions' button.

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

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

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

**Step 7:** Click the **Forget this email** button in case you do want to unsubscribe from newsletters.

## 3.6.2 Newsletter Manager

**eXo WCM** facilitates administrators to easily and quickly manage and control newsletters by following the steps below:

Go to **Groups** → **Newsletter Manager** on the Administration bar. The Newsletter Manager page will appear:

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


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

Illustration 124: The Newsletter Manager Page

### 3.6.2.1 Category

Administrators easily add new categories.

#### a) Add a new category

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

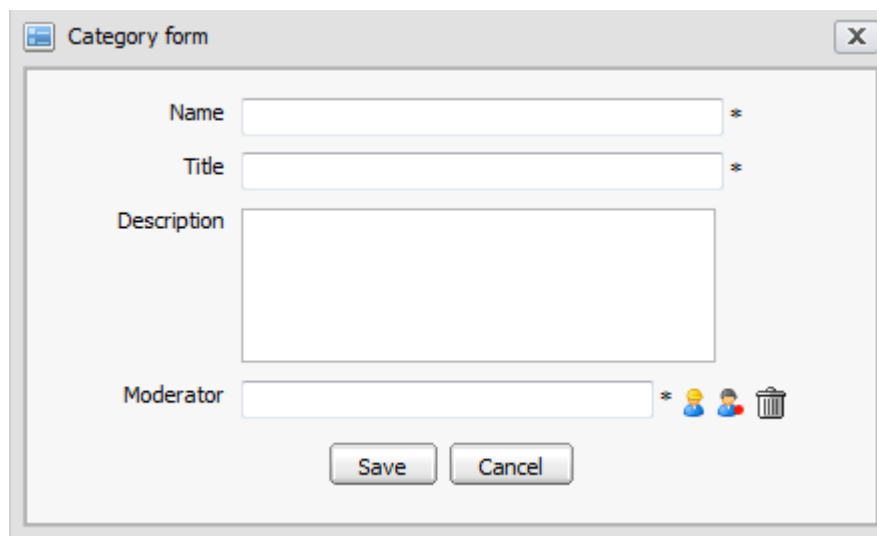



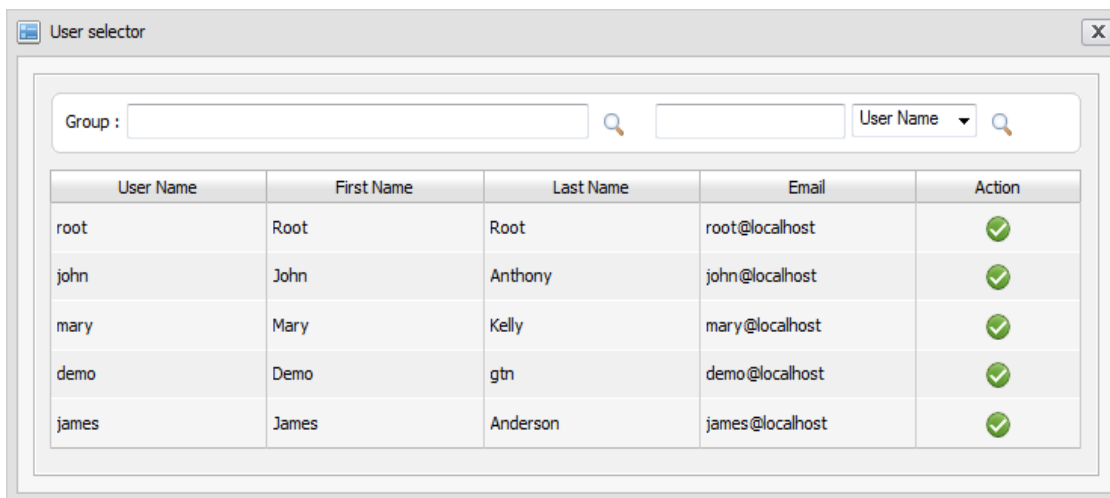
Illustration 125: The Category form

Details:

|                    |  |
|--------------------|--|
| <b>Name</b>        | The name of a category. This field is required.  |
| <b>Title</b>       | The title of a category. This field is required.   |
| <b>Description</b> | The brief description about the category. This field isn't required                      |
| <b>Moderator</b>   | Allows an administrator to select which memberships what group can manage this category. |
| <b>Save</b>        | To accept adding a new category.   |
| <b>Cancel</b>      | Allows quitting the <b>Category form</b> without adding category.                        |

**Step 2:** Input values for fields.

Select a moderator for a category by clicking the  icon next to the **Moderator** field to select an user. The **User selector** form will appear:



User selector

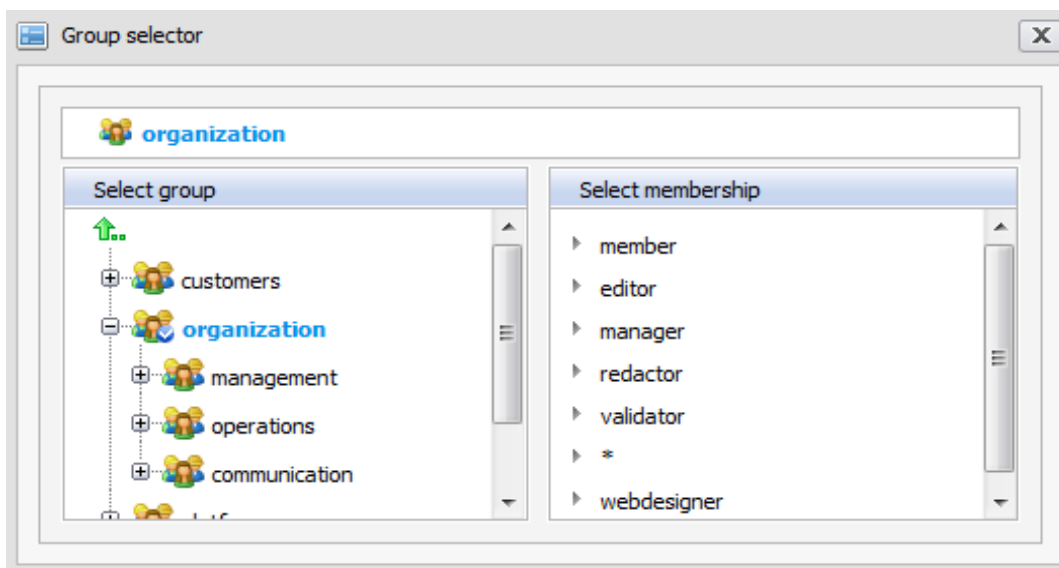
Group :    User Name

| User Name | First Name | Last Name | Email           | Action                              |
|-----------|------------|-----------|-----------------|-------------------------------------|
| root      | Root       | Root      | root@localhost  | <input checked="" type="checkbox"/> |
| john      | John       | Anthony   | john@localhost  | <input checked="" type="checkbox"/> |
| mary      | Mary       | Kelly     | mary@localhost  | <input checked="" type="checkbox"/> |
| demo      | Demo       | gtn       | demo@localhost  | <input checked="" type="checkbox"/> |
| james     | James      | Anderson  | james@localhost | <input checked="" type="checkbox"/> |


Illustration 126: The User selector form

Click the  icon to select a user in the list.











Click the  icon to select users in a specific group. The **Group selector** will appear:



Group selector

 organization

Select group

-   customers
-   organization
-   management
-   operations
-   communication

Select membership

- ▶ member
- ▶ editor
- ▶ manager
- ▶ redactor
- ▶ validator
- ▶ \*
- ▶ webdesigner

Illustration 127: The Group selector form

Select one group in the left panel and select a membership in the right panel. The membership and group that you have just selected will be displayed on the **Moderator** field.

After adding new categories, they will be added in the list of the categories.

**Step 3:** Click the category that you want to manage (for example: the **Fashion** category).



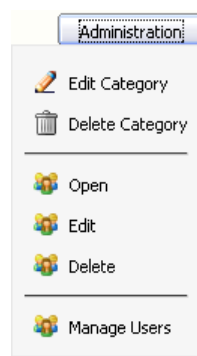
Here, you can create new subscriptions or newsletters for this category.

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

## b) Edit a Category

To edit a category, follow these steps:

**Step 1:** Click the **Administration** button → **Edit Category**.



The **Category** form will appear:

The screenshot shows the 'Category form' window. It contains the following fields: 'Name' (Fashion), 'Title' (New Trend), 'Description' (New Trend Fashion), and 'Moderator' (manager:/organization). There are 'Save' and 'Cancel' buttons at the bottom.



Details:

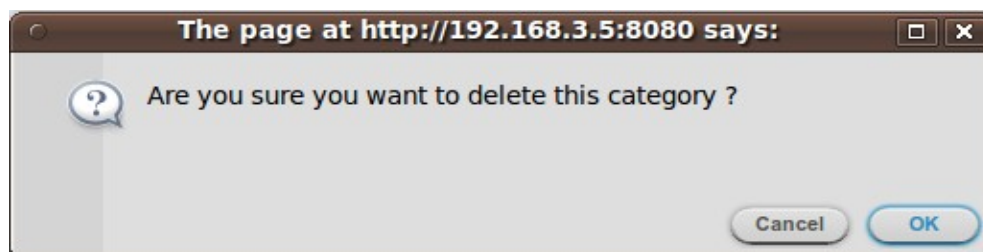
|                    |   |
|--------------------|---|
| <b>Name</b>        | The name of the category. This field can not be changed   |
| <b>Title</b>       | The title of the category. This field can be changed.   |
| <b>Description</b> | The brief description about the category. This field can be changed.  |
| <b>Moderator</b>   | Allows an administrator to select which memberships in what group can manage this category by selecting membership and group. This field cannot be changed. |
| <b>Save</b>        | To save editing a new category.   |
| <b>Cancel</b>      | Allows quitting the <b>Category form</b> without editing a new category.  |

**Step 2:** Change the values in the **Title** and **Description** fields if you want.

**Step 3:** Click the **Save** button to save all the changes or the **Cancel** button to quit without saving any change.

### c) Delete a Category

**Step 1:** Click **Delete Category** in the menu. The confirmation message will appear:

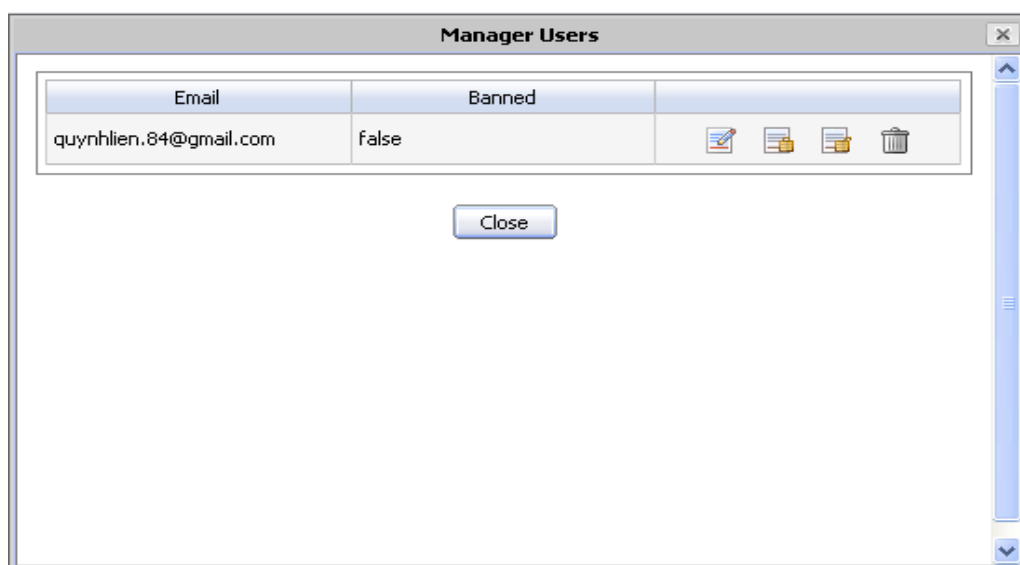


**Step 2:** Click the **OK** button to accept deleting this category or the **Cancel** button to quit without deleting.

### d) Manage Users

Administrator easily manage users with some actions such as: edit, ban, remove ban or delete users.

**Step 1:** Click the **Administration** button → **Manage Users** in the menu. The **Manager Users** form will appear:







| Email                  | Banned |
|------------------------|--------|
| quynhlien.84@gmail.com | false  |

Close

Illustration 128: The Manager Users form

Details:

|   |   |
|---|---|
| Email   | The email address of a user that subscribes to this subscription.   |
| Banned  | There are 2 values: <b>false</b> means a user is allowed to get emails or <b>true</b> 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.  |

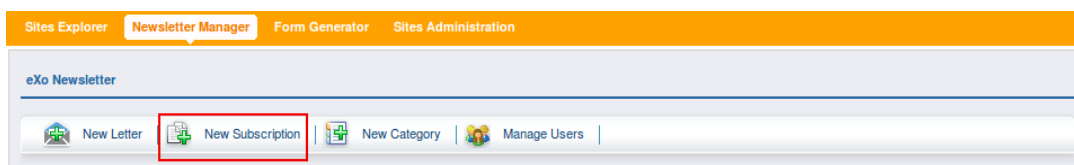
**Step 2:** Click the **Close** button to close this form.

### 3.6.2.2 Subscription

In each category, an administrator can add more new subscriptions for that category. There are two ways to add a subscription for a category:

**The 1<sup>st</sup> way:**

Click **New Subscription** on the action bar.



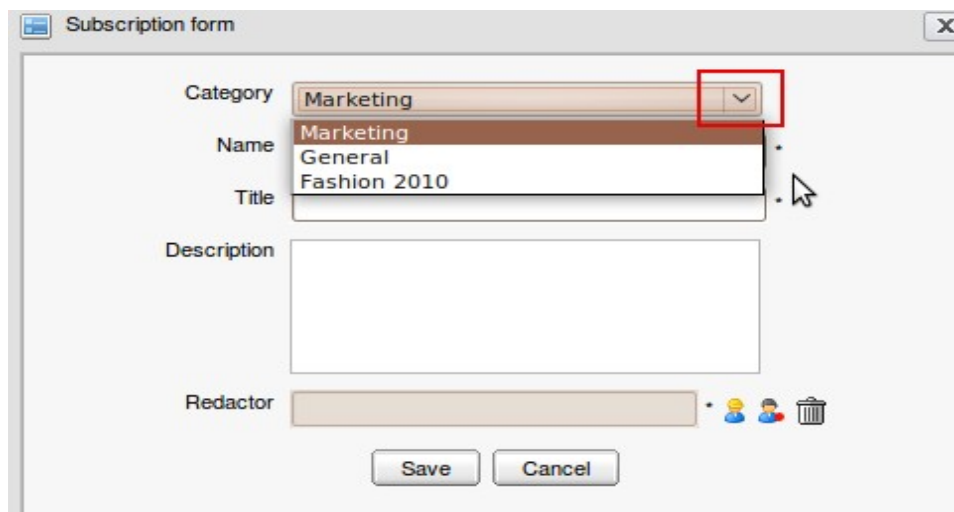
The **Subscription** form will appear:

The 'Subscription form' dialog box is shown. It has a title bar with a close button. Inside, there are several fields: 'Category' is a dropdown menu currently set to 'Marketing'; 'Name' is a text input field with an asterisk indicating it's required; 'Title' is another text input field with an asterisk; 'Description' is a larger text area; and 'Redactor' is a text input field with an asterisk and icons for user selection. At the bottom are 'Save' and 'Cancel' buttons.


**Illustration 129: The Subscription form**

Details:

|                    |   |
|--------------------|---|
| <b>Category</b>    | The category that contains this subscription.   |
| <b>Name</b>        | The name of the subscription. This field is required.   |
| <b>Title</b>       | The title of the subscription. This field is required.  |
| <b>Description</b> | The brief description about the subscription. This field is not required.   |
| <b>Redactor</b>    | Allows an administrator to select which memberships in what group can manage this subscription by selecting membership and group. This field cannot be changed. |



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 icon), 'Name' (a text field with 'Marketing' entered), 'Title' (a text field with 'General Fashion 2010' entered), and 'Description' (a large empty text area). At the bottom, there is a 'Redactor' field with a red box around it, and two buttons: 'Save' and 'Cancel'.

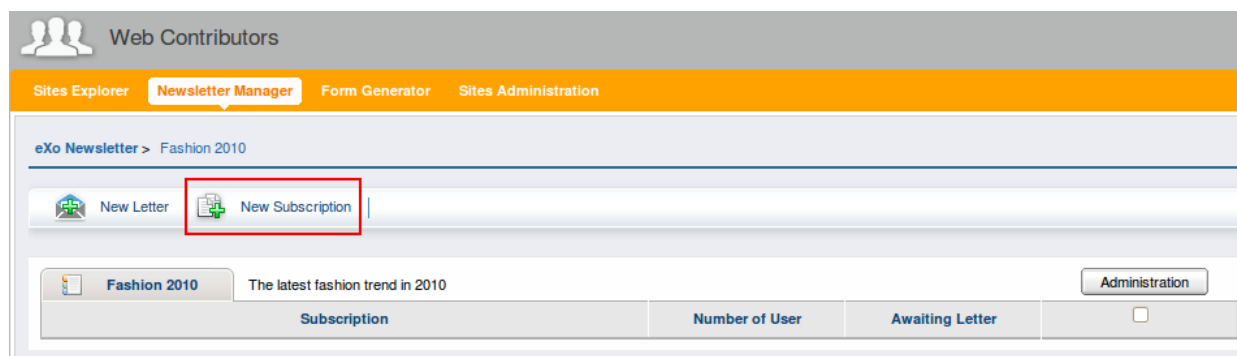
**Step 1:** Click  to select the category for which you want to create a subscription:

**Step 2:** Input values in the fields in this form.

**Step 3:** Click the Save button to accept creating a new subscription or the Cancel button to quit without creating a new subscription.

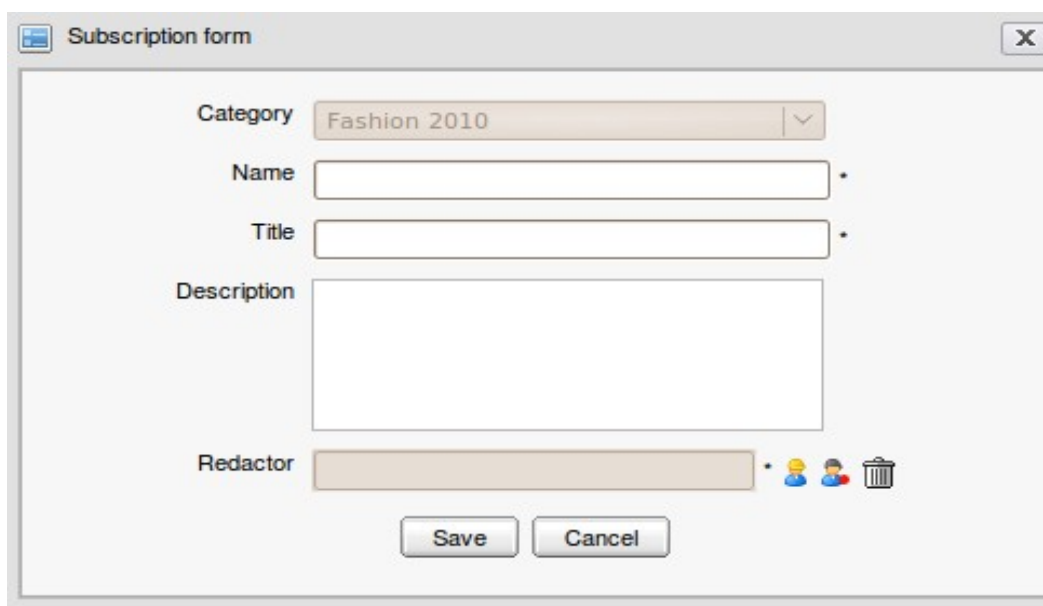
#### The 2<sup>nd</sup> way:

Click directly the category that you want to create a subscription



The image shows the 'Web Contributors' interface. At the top, there is a navigation bar with 'Sites Explorer', 'Newsletter Manager' (highlighted), 'Form Generator', and 'Sites Administration'. Below this, there is a section for 'eXo Newsletter > Fashion 2010'. In the center, there is a 'New Subscription' button with a red box around it. At the bottom, there is a table with columns: 'Subscription', 'Number of User', 'Awaiting Letter', and 'Administration'.

Click **New Subscription** on the action bar . The **Subscription form** will appear and do the same as the 1<sup>st</sup> way.



A screenshot of a 'Subscription form' dialog box. It contains the following fields: 'Category' (a dropdown menu showing 'Fashion 2010'), '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"/> |

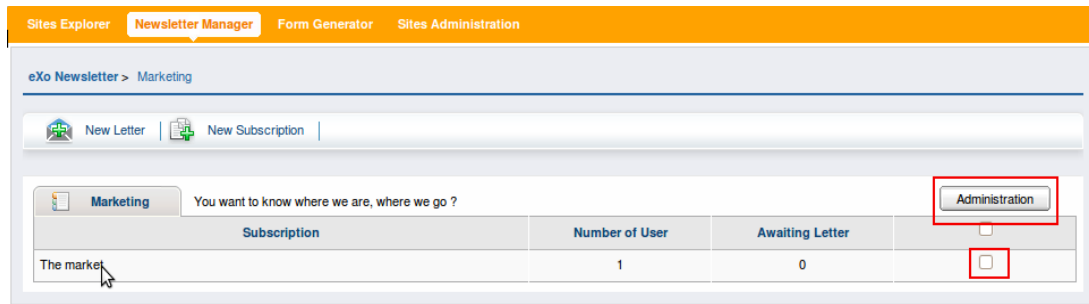
Details:

|                      |  |
|----------------------|--|
| <b>Shoes</b>         | The name of the subscription.  |
| <b>Fashion shoes</b> | The brief description about the subscription.                          |
| <b>Letter</b>        | List all letters of this subscription.                                 |
| <b>Date</b>          | The date and time when creating this letter.                           |
| <b>Status</b>        | There are 3 types of status: draft, awaiting and sent.                 |
| <b>Moderation</b>    | This button allows you to take actions on a newsletter that you select |

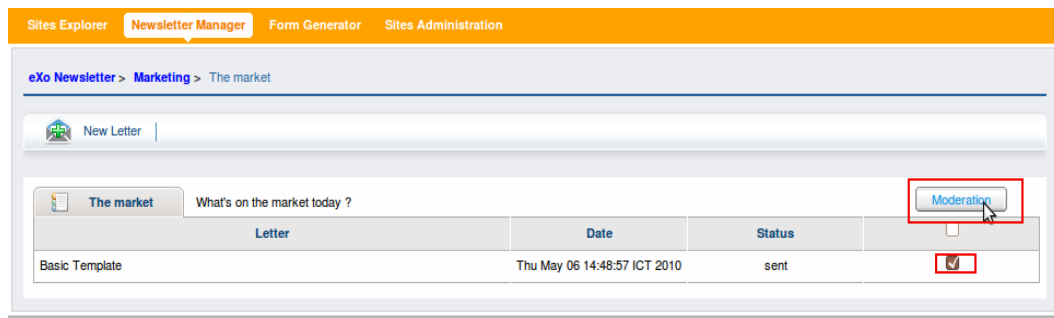
### 3.6.2.3 Open a Newsletter

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

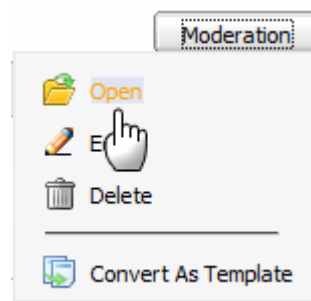
**Step 1:** Choose a specific subscription in a category by left-clicking on it or checking in the checkbox → choose the **administration** button → choose **Open** item:



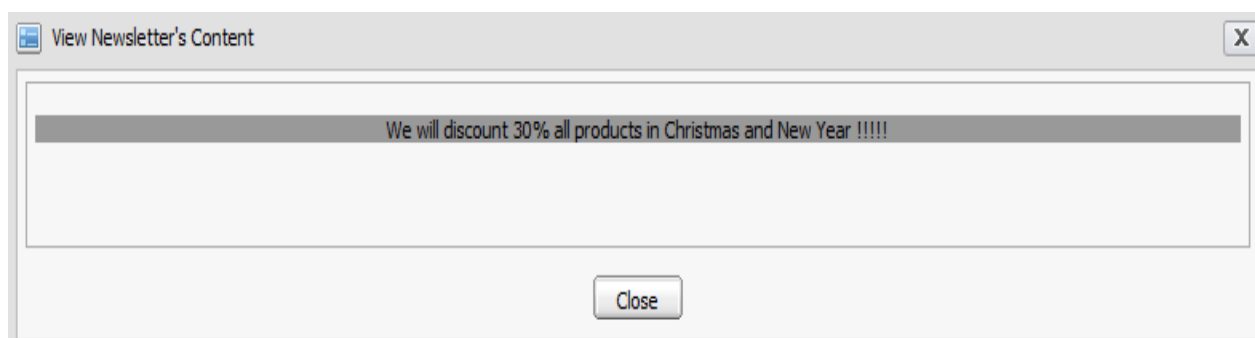
**Step 2:** Select the newsletter that you want to open by left-clicking on it or selecting the checkbox.



**Step 3:** Click the **Moderation** button → **Open** in the menu.



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



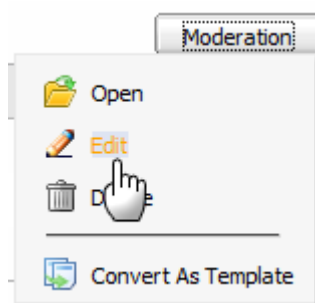
**Step 4:** Click the **Close** button to close this form.

#### 3.6.2.4 Edit a Newsletter

Do the following to edit a newsletter:

**Step 1:** In a specific subscription, select the newsletter that you want to edit by selecting the checkbox.

**Step 2:** Click the  button → choose **Edit** in the menu.



The **Newsletter entry form** will appear:

The screenshot shows the 'Newsletter entry form' window. It contains several input fields: 'Template' (Basic Template), 'Send date' (03/06/2010 16:43:18), 'Category' (New Trend), and 'Subscription' (Euro exported shoes). Below these is an 'Update sending parameters' button. The form is divided into three tabs: 'Main Content', 'Illustration', and 'Advanced'. The 'Main Content' tab is active, showing fields for 'Name' (discount) and 'Title' (Discount). Below these is a rich text editor with a toolbar containing icons for source, undo, redo, bold, italic, underline, text color, background color, bulleted list, numbered list, link, unlink, and other formatting options. The editor contains the text: 'We will discount 30% all products in Christmas and New Year !!!!!'.

**Step 3:** Change the values in the fields that you want to edit: **Template**, **Send date**, **Category**, **Subscription**.

**Step 4:** Click the **Update a Newsletter's info** button.

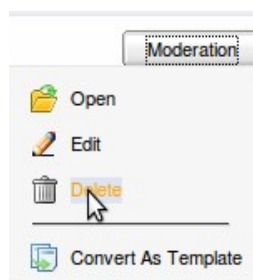
**Step 5:** Change the values in the fields: **Title** and **Main content**.

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


### 3.6.2.5 Delete a Newsletter

Administrator can delete obsolete newsletters by following:

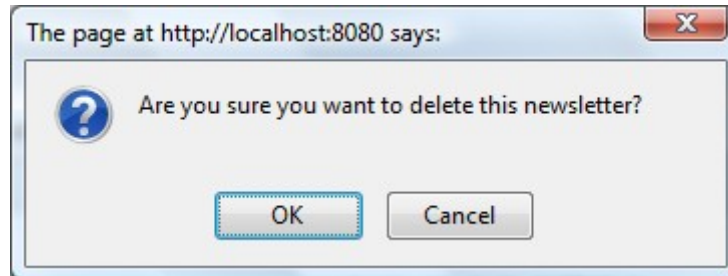
**Step 1:** In a specific subscription, select the newsletter that you want to delete by selecting the checkbox





**Step 2:** Click the  button → click **Delete** in the menu.

The confirmation message will be displayed:



**Step 3:** Click the **OK** button to accept deleting this newsletter or the **Cancel** button to quit without deleting.

### 3.6.2.6 Convert as Template

Administrator can reuse the template of the frequently used newsletter template by:

**Step 1:** Select the newsletter that you want to make it as a template.

**Step 2:** Click the  button → **Convert as Template** in the menu. The next time when you create a newsletter, this template will be listed in the **Template** field in the **Newsletter entry form**.

### 3.6.2.7 Newsletters

Each subscription consists of many newsletters. **eXo 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:

Newsletter entry form

Template : Basic Template

Send date : 03/06/2010 16:43:18

Category : New Trend

Subscription : Euro exported shoes

Update sending parameters

Main Content Illustration Advanced

Name : template1 \*

Title : Discount \*


Main content

We will discount 30% all products in Christmas and New Year !!!!!

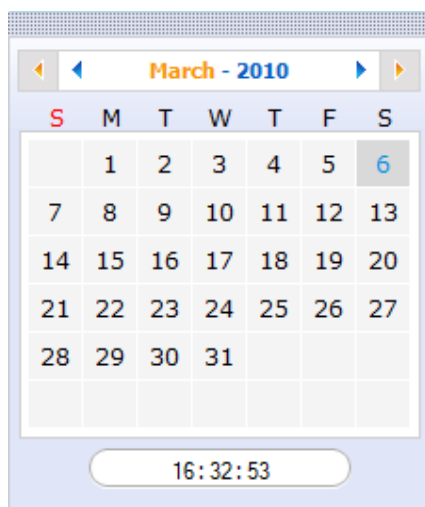
**Illustration 130: The Newsletter entry form**

Details:

|                                  |   |
|----------------------------------|---|
| <b>Template</b>                  | The template that you select for your newsletter form.              |
| <b>Send date</b>                 | The date and time when you want to send this newsletter.            |
| <b>Category</b>                  | The category contains this newsletter.                              |
| <b>Subscription</b>              | The subscription contains this newsletter.                          |
| <b>Update sending parameters</b> | 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.

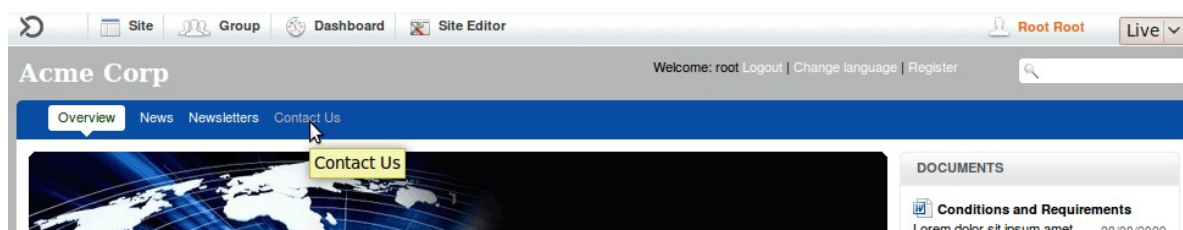
**Step 6:** Click the **Update sending parameters** button to update information about this newsletter. A message pops up and informs that you have updated information successfully.

**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 the **Save** button to save this newsletter as draft or click the **Send** button to send this newsletter .

**Step 10:** **Contact Us** on the navigation bar or go to **Site** → **Acme** → **Contact Us**



The **Contact Us** page will appear:

LEAVE YOUR MESSAGE

Select a recipient: Infos

Your Name

Your Address

Your Email Address

Your Phone Number

Your Message

Save

Done

Details:

|                           |  |
|---------------------------|--|
| <b>Select a recipient</b> | the recipient who will receive a message           |
| <b>Your name</b>          | the name of a person who leaves a message          |
| <b>Your Address</b>       | the address of a person who leaves a message       |
| <b>Your Email Address</b> | the email address of a person who leaves a message |
| <b>Your Phone Number</b>  | the phone number of a person who leaves a message  |
| <b>Your message</b>       | write a message that you want to leave             |

**Step 11:** Select a recipient and enter values in this form.

**Step 12:** Click the **Save** button to save a message.

## 3.7 Fast Content Creator

The **eXo 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:

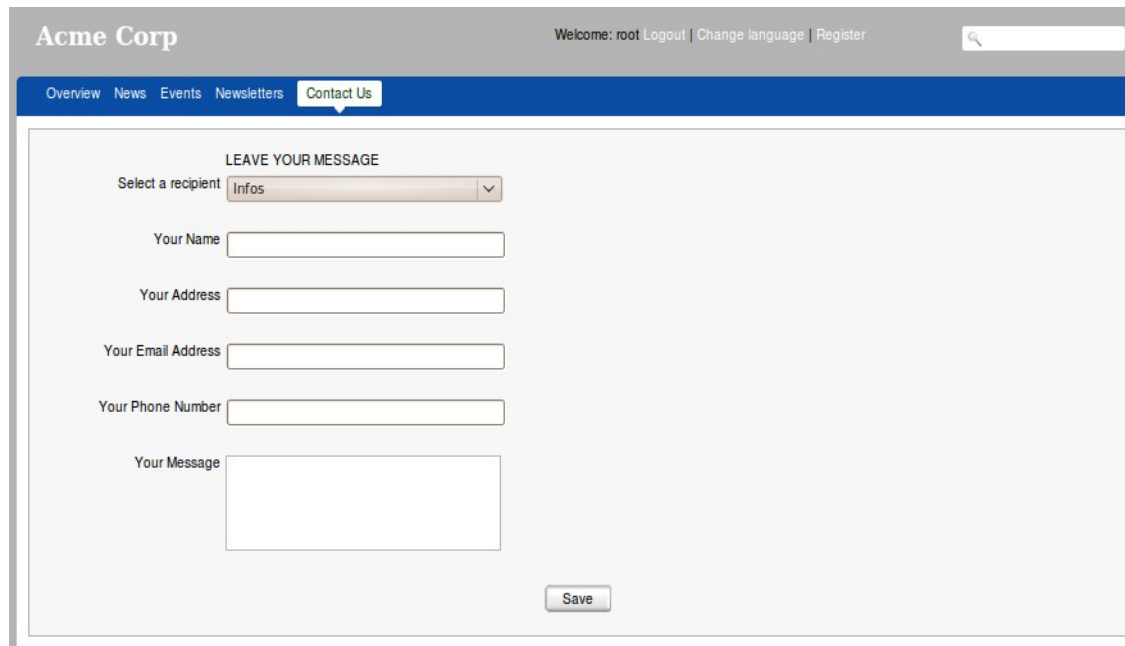


Illustration 131: The Contact Us page

Details:

|                           |  |
|---------------------------|--|
| <b>Select a recipient</b> | To choose people who will receive the message.             |
| <b>Your Name</b>          | To type the name of person who leaves a message.           |
| <b>Your Address</b>       | To type the address of person who leaves a message.        |
| <b>Your Email Address</b> | To enter the email address of person who leaves a message. |
| <b>Your Phone Number</b>  | To enter the phone number of person who leaves a message.  |
| <b>Your Message</b>       | To write a message that you want to leave.                 |

**Step 2:** Select a recipient and enter values in this form.

**Step 3:** Click the **Save** button to save a message.

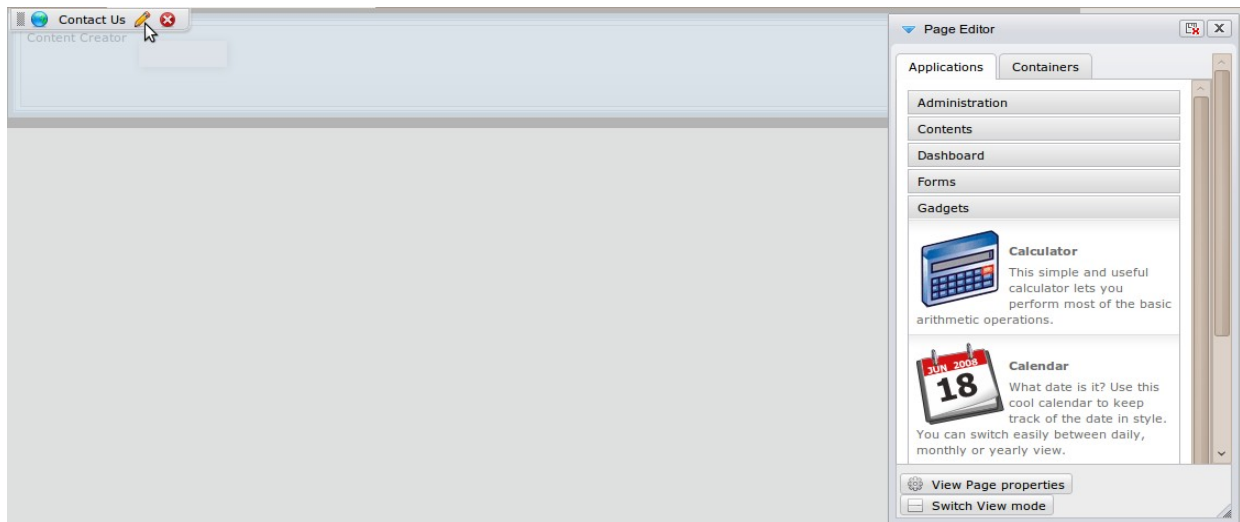
### 3.7.1 Edit Mode

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

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

**Step 2:** Click **Site Editor** on the administration bar → **Edit Page**. The **Page Editor** will be displayed.


**Step 3:** Click the edit icon to open the **Edit Mode** tab in the **Contact Us** portlet.




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

[Edit Mode](#) | [Portlet Setting](#) | [Select Icon](#) | [Decoration Themes](#) | [Access Permission](#)

---

**Save location**  
 Location to save:  

**Template options**  
 Select template:    
 Custom save button:   
 Custom save message: 

Your comment has been received.  
We appreciate your feedback.

  
 Redirect: ☒  
 Redirect path:

**Actions**  

| Name      | Description | Instance of | Action |
|-----------|-------------|-------------|--------|
| No action |             |             |        |

Details:

|                            |  |
|----------------------------|--|
| <b>Location to save</b>    | To select the location for saving documents or messages.   |
| <b>Select Template</b>     | To choose available templates for documents. There are corresponding fields to each template.                        |
| <b>Custom save button</b>  | To change the label for the save button.   |
| <b>Custom save message</b> | To show the message that informs you have just saved a document.   |
| <b>Redirect</b>            | To allow users to redirect the path in the <b>Redirect path</b> field.   |
| <b>Redirect path</b>       | To show a path that a user will be directed to after he/she clicks the <b>OK</b> button in the confirmation message. |
| <b>Actions</b>             | To add another actions to documents.   |

**Step 4:** Click the icon  to search for the location for saving documents. The **Select location** form will appear:

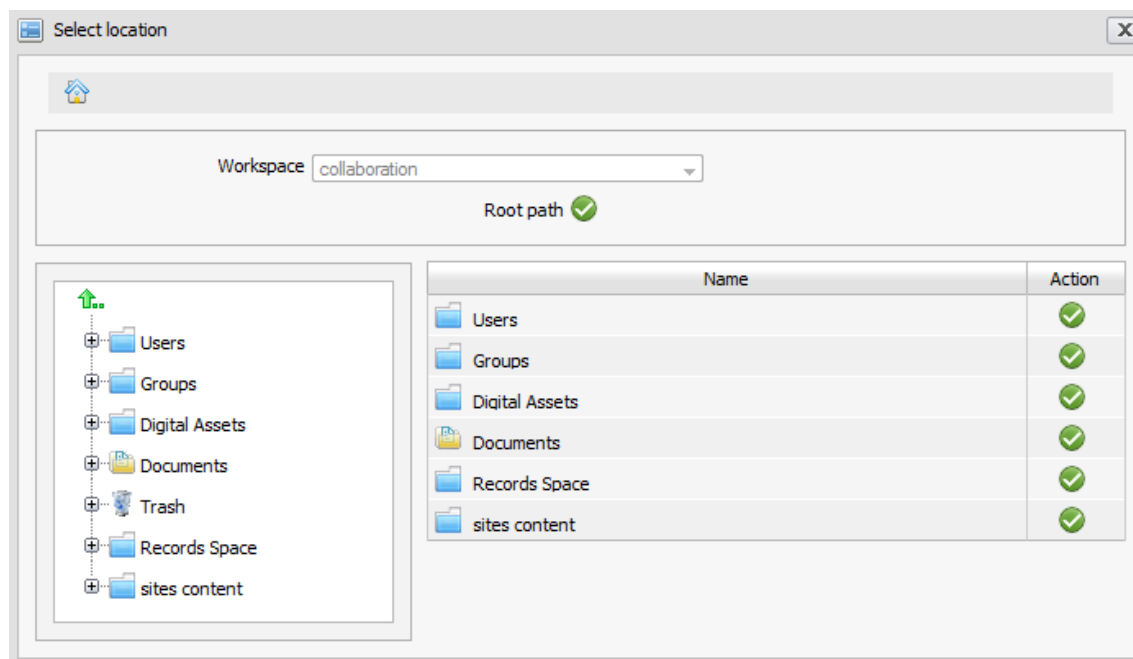


Illustration 132: The Select location form

**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 the **Save** button and the message content after clicking the **Save** button.

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

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



## 3.8 Form Generator

The Form Generator portlet allows users to create and to edit template of document types. Documents are stored in the so-called node; therefore, the term “node” and node types are often applied.

**Step 1:** Go to **Group** → **Form Generator** on the **Administration** bar. The **Form Generator** will appear like the illustration below:

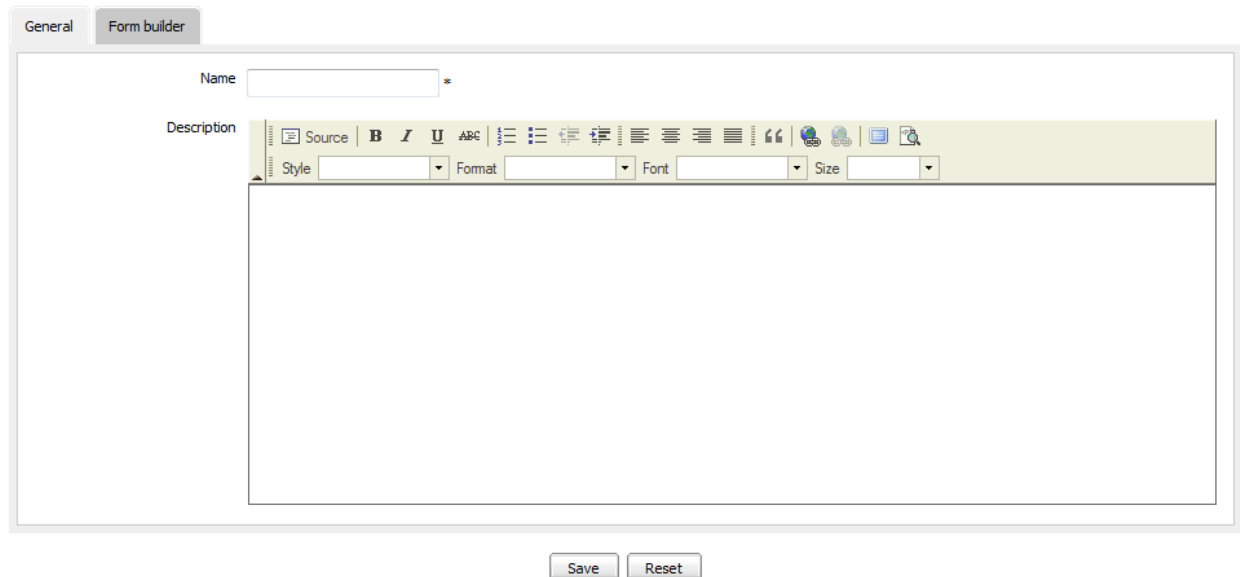
The screenshot shows the 'General' tab of the Form Generator portlet. At the top, there are two tabs: 'General' (selected) and 'Form builder'. Below the tabs, there is a 'Name' field with an asterisk indicating it is required. Underneath is a 'Description' field. To the right of the 'Description' field is a rich text editor toolbar with options for 'Source', bold, italic, underline, text color, background color, bulleted list, numbered list, link, unlink, and image. Below the toolbar are dropdown menus for 'Style', 'Format', 'Font', and 'Size'. A large text area for the description is located below these controls. At the bottom of the portlet, there are 'Save' and 'Reset' buttons.

Illustration 133: The General tab in the Form Generator Portlet

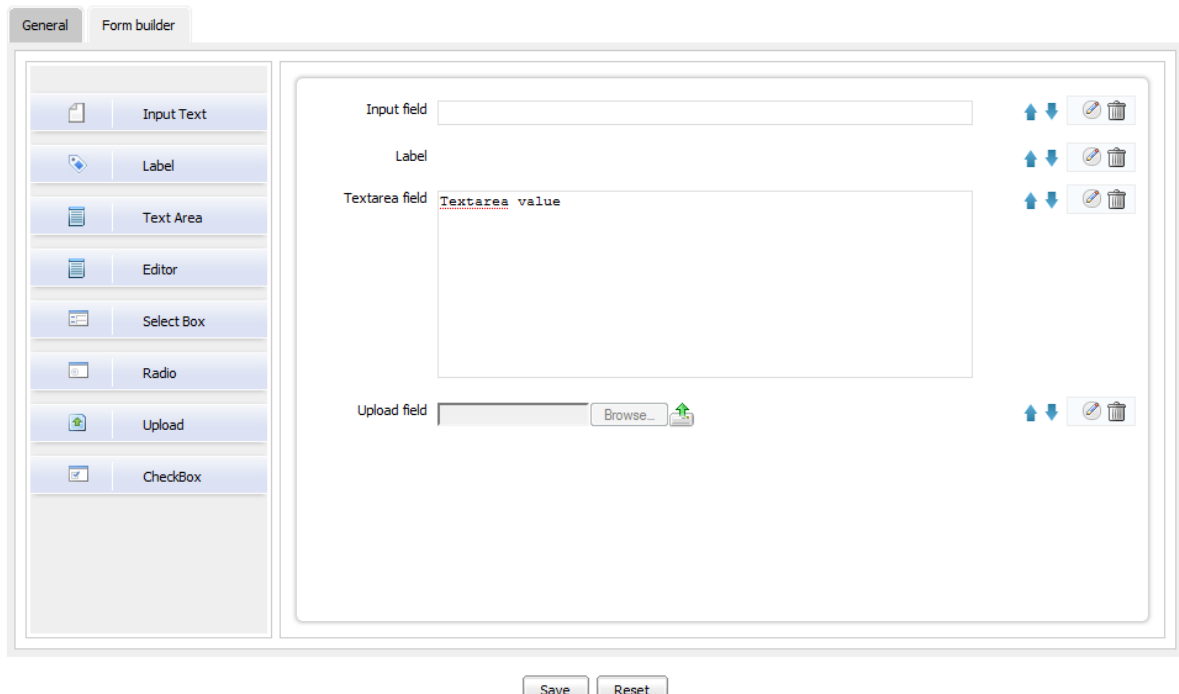
**Step 2:** Input the node name in the **Name** field. (\*Required).

**Step 3:** Input the brief description about the node.




Illustration 134: The Form builder tab


**Step 4:** Click the **Form builder** tab that allows users to set properties for a node. Available components are displayed on the left panel.

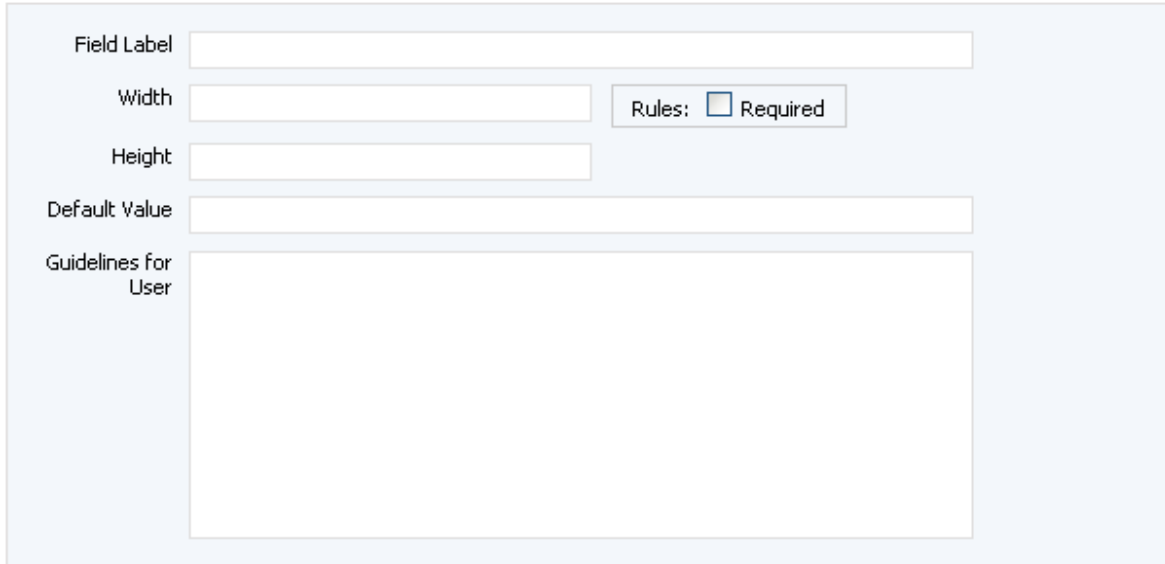


**Step 5:** Click the desired components on the left panel. The selected components will be displayed on the right panel.

**Step 6:** Click the icon  corresponding to the component to move this component up or

the icon  to move the component down.

**Step 7:** Click the icon  that corresponds to the component to edit properties of that component. The form to edit properties appears like the illustration below:



The form contains the following fields and controls:

- Field Label:
- Width:  Rules: ☐ Required
- Height:
- Default Value:
- Guidelines for User:

Details:

|                     |   |
|---------------------|---|
| Field Label         | To enter the field label.   |
| Width               | To enter the field width. If the checkbox in Rules: <input type="checkbox"/> Required is marked, the star * will appear beside the text box, indicating that it is required to input values for the text box. |
| Height              | To enter the field height.  |
| Default Value       | To display the default value.   |
| Guidelines for User | To give instructions about this component.  |

To delete this component click the trash icon  that corresponds to the component.

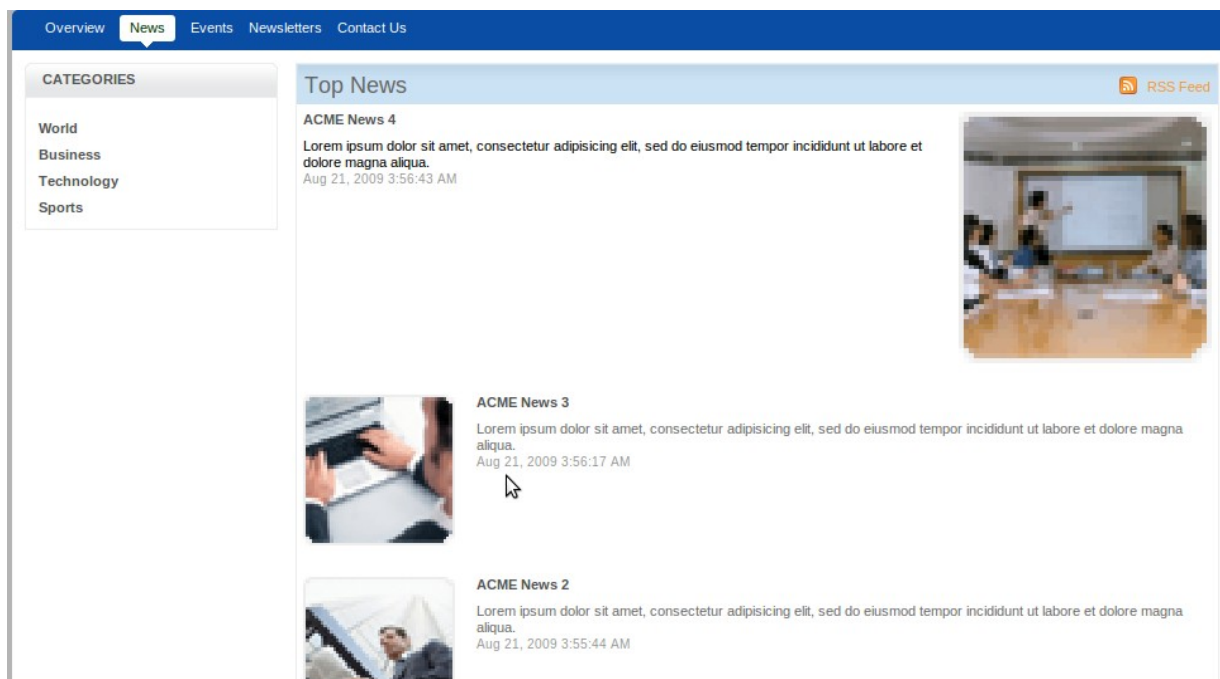
**Step 7:** Click the **Save Form** button to save the form that you have created for nodes.

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

## 3.9 Categories

When implementing the Category, users will actually enjoy nice features via the Category model. Thanks to the symbolic link, no matter where the object physically resides, the database can retrieve it. In addition, the relations amongst shortcuts can be managed. Now, you can view documents or web content in the Parameterized Content List Viewer in such an easy way.

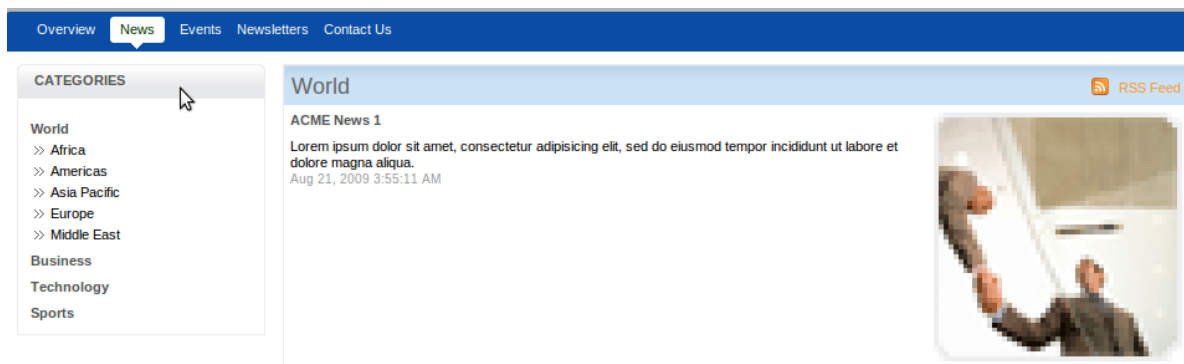
**Step 1:** Go to **News** on the navigation bar.



The left panel: lists all the sub-categories containing documents or web content.

The right panel: shows the documents or web content that you have selected on the left panel.

**Step 2:** Select a category that you want to view on the left, it will be shown on the right




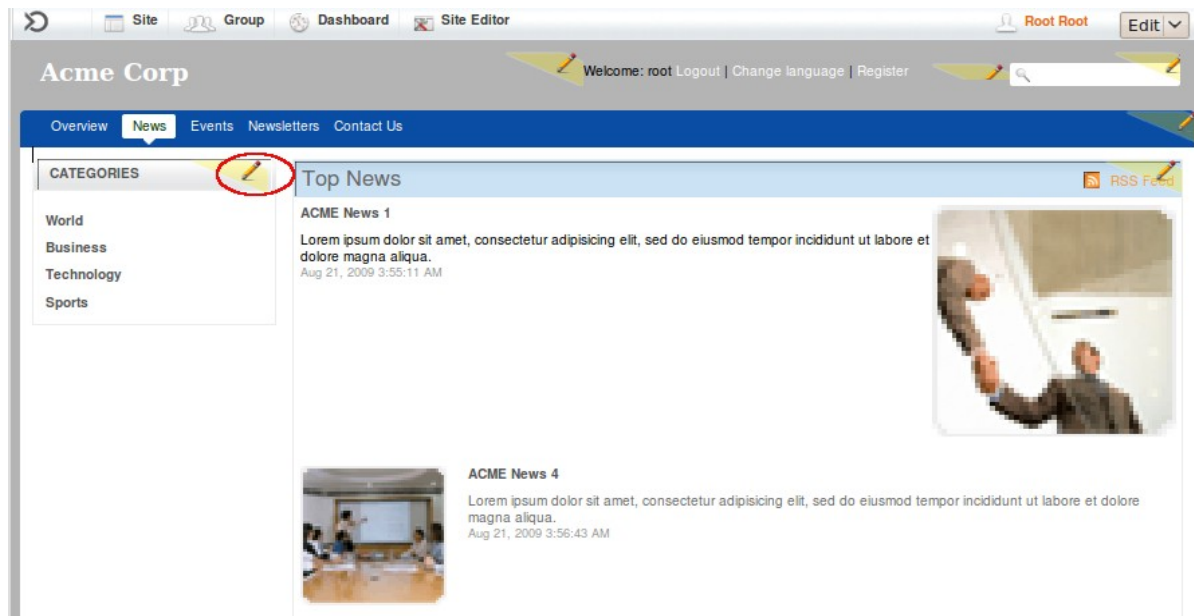
(only documents or web content published are shown).

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

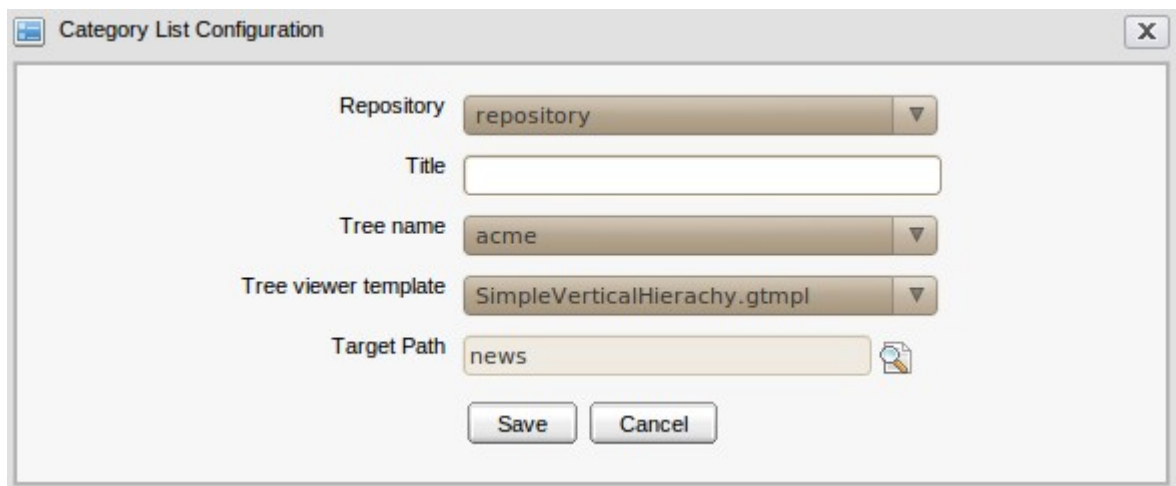
### 3.9.1 The Edit Mode of Category Navigation portlet

Administrators can edit the Category Navigation portlet by following these steps:

**Step 1:** Go to **News** → Turn on the **Edit** mode → Click the  edit icon on the **Category** panel.



The Category List Configuration form will appear like the illustration below:

The 'Category List Configuration' form is a dialog box with a title bar. It contains several configuration options: 'Repository' (a dropdown menu with 'repository' selected), 'Title' (a text input field), 'Tree name' (a dropdown menu with 'acme' selected), 'Tree viewer template' (a dropdown menu with 'SimpleVerticalHierachy.gtmpl' selected), and 'Target Path' (a text input field with 'news' entered). At the bottom, there are 'Save' and 'Cancel' buttons.

Or, go to **Group** → **Administration** → **Page Management** on the Administration bar. The Manage Pages form appears like the illustration below:

| Administration ▾                                     |                             |                                      |                                    |        |
|--|-----------------------------|--------------------------------------|------------------------------------|--------|
| Search: <input type="text"/>                         |                             | Owner type ▾                         |                                    |        |
| Page Id  | Title                       | Access Permission                    | Edit Permission                    | Action |
| group::platform/web-contributors::Site Explorer      | Site Explorer               | [*/platform/web-contributors]        | manager:/platform/web-contributors |        |
| group::platform/web-contributors::WCM Administration | WCM Administration          | [manager:/platform/web-contributors] | manager:/platform/web-contributors |        |
| portal:acme::category                                | Category navigation portlet | [Everyone]                           | */platform/administrators          |        |
| portal:acme::clv                                     | Content List Viewer Portlet | [Everyone]                           | */platform/administrators          |        |
| group::platform/administrators::community management | Community Management        | [manager:/platform/administrators]   | manager:/platform/administrators   |        |
| portal:acme::confirmation                            | Contact Form Confirmation   | [Everyone]                           | editor:/platform/web-contributors  |        |
| portal:acme::contactus                               | Contact Us                  | [Everyone]                           | */platform/web-contributors        |        |
| portal:acme::events                                  | Events                      | [Everyone]                           | editor:/platform/web-contributors  |        |
| group::platform/web-contributors::form generator     | Form Generator Portlet      | [*/platform/web-contributors]        | manager:/platform/web-contributors |        |
| portal:acme::navigation                              | Page Navigation             | [*/platform/web-contributors]        | */platform/administrators          |        |
| <input type="button" value="Add New Page"/>          |                             |                                      |                                    |        |

**Step 2:** Click the icon that corresponds to the **Category navigation portlet** for editing this portlet.

The **Edit Mode** will be displayed:

Edit Mode
Portlet Setting
Select Icon
Decoration Themes
Access Permission

Repository 
Title 
Tree name 
Tree viewer template 
Target Path

Details:

|                             |   |
|-----------------------------|---|
| <b>Repository</b>           | The location used for storing documents or web content. |
| <b>Title</b>                | The subject that will be displayed in the View mode.    |
| <b>Tree name</b>            | The available types of taxonomy tree.                   |
| <b>Tree Viewer Template</b> | The template of the category navigation.                |
| <b>Target Path</b>          | The path that will display documents or web content.    |

**Step 4:** Click  to select the repository for documents in the **Repository** field.

**Step 5:** Input the category name in the **Title** field.

**Step 6:** Select the taxonomy tree for a category.

**Step 7:** Select the template for displaying categories.

**Step 8:** Click the icon  to select the target path. The **Page selector** form will appear:

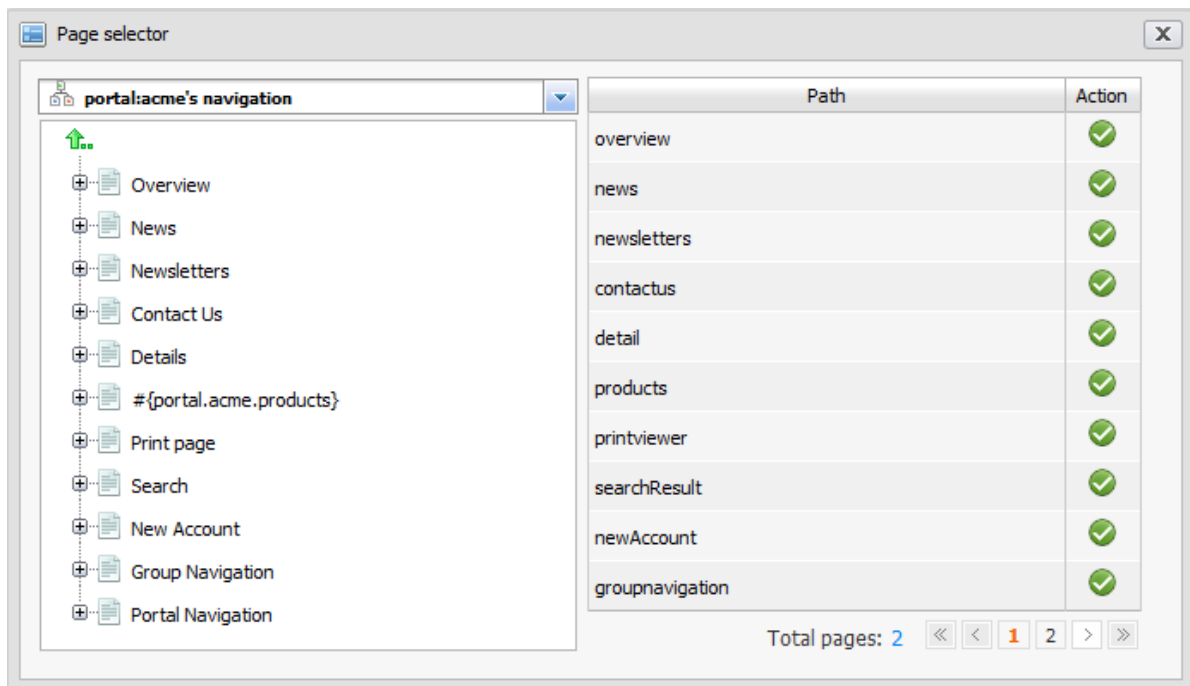




Illustration 135: The Page selector form

**Step 9:** Click  to select the navigation on the left panel. The corresponding pages will be displayed on the left panel and the corresponding paths will be displayed on the right panel.

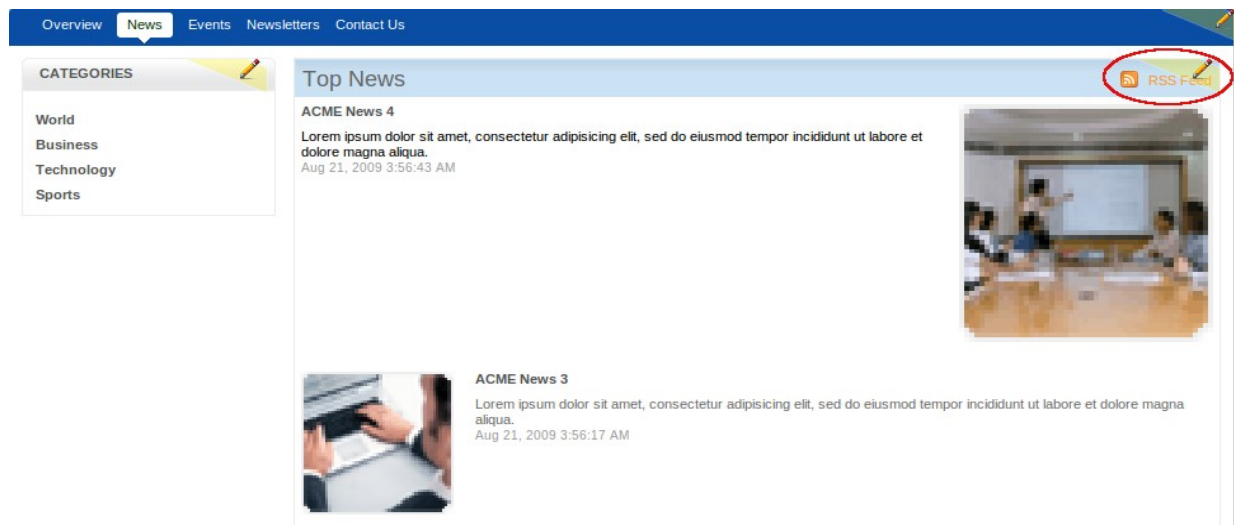
**Step 10:** Click the icon  to select the path. This path will be displayed in the **Target Path** field.


**Step 11:** Click the **Save** button to accept saving the configuration for the **Category Navigation** portlet.

### 3.9.2 The Edit Mode in Parameterized Content List Viewer

Users are entitled to edit the settings in the Parameterized Content List Viewer portlet.

**Step 1:** Turn on the Edit mode of a site.



**Step 2:** Click the edit icon (  ) at the upper right corner of this panel, the edit form of Parameterized Content List Viewer will be displayed:



Parameterized content list viewer configuration

Contents selection

Order by: Title

☐ Descendant ☒ Ascendant

Display setting

Header: Top News ☒ Automatic Detection

Viewer template: BigHotNewsTemplate.gtmpl

Paginator template: UIPaginatorDefault.gtmpl

Taxonomy tree: acme

Items per page: 5 \*

☒ Show title ☒ Show illustration ☒ Show summary

☒ Show header ☒ Show date created ☒ Show link

☐ Show refresh button ☐ Show read more ☒ Show RSS link

Link Format

Target page: detail

Save Cancel

Illustration 136: The Edit Mode in the Parameterized Content List Viewer portlet

Details:

|                           |  |
|---------------------------|--|
| <b>Order by</b>           | To choose types of order priority for documents or web-content. The <b>"descendant"</b> means documents or web-content are arranged according to the increasing order; meanwhile the <b>"ascendant"</b> means documents or web-content are arranged according to the decreasing order. |
| <b>Header</b>             | 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.   |
| <b>Viewer template</b>    | To choose the template in which documents or web-content will be displayed for viewing.  |
| <b>Paginator template</b> | To choose the template in which documents or web-content will be arranged.   |
| <b>Items per page</b>     | To enter a number of documents or web-content that will be displayed per page.   |
| <b>Show title</b>         | To allow showing titles of documents or web-content.   |


|                             |  |
|-----------------------------|--|
| <b>Show header</b>          | To allow showing headers of documents or web-content.                |
| <b>Show refresh button:</b> | To allow showing the refresh button.                                 |
| <b>Show illustration</b>    | To allow showing images of documents or web-content.                 |
| <b>Show date created</b>    | To allow showing the date when documents or web-content are created. |
| <b>Show read more</b>       | To allow showing more documents or web-content.                      |
| <b>Show summary</b>         | To allow showing summaries of documents or web-content.              |
| <b>Show link</b>            | To allow showing the title of document or web-content.               |
| <b>Show RSS link</b>        | To allow showing the RSS link containing documents or web-content.   |
| <b>Target page</b>          | 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:

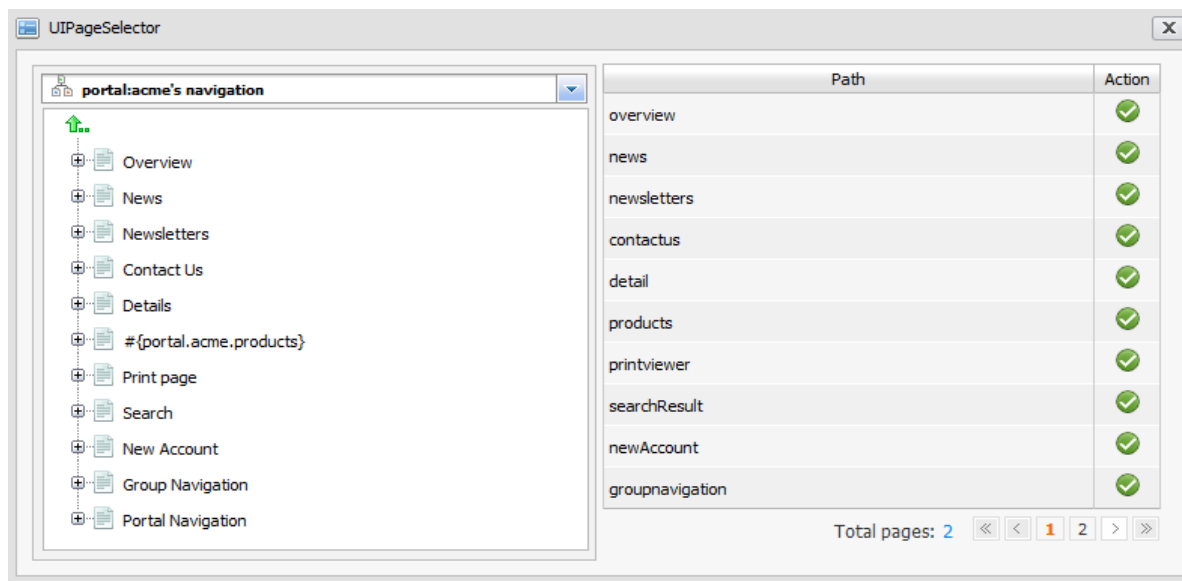




Illustration 137: The Page selector form

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.

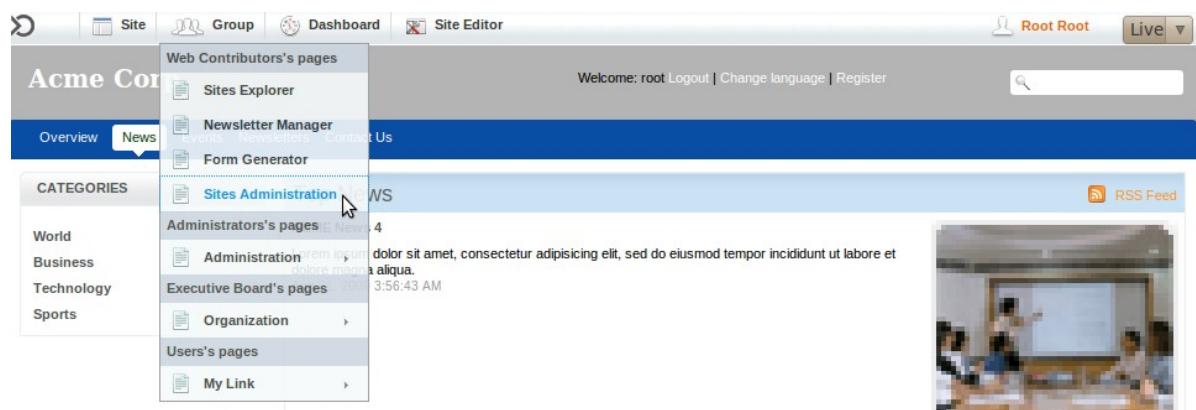
**Step 8:** Click the **Save** button to accept changes or the **Cancel** button to quit without saving.

## 4 eXo WCM Administration

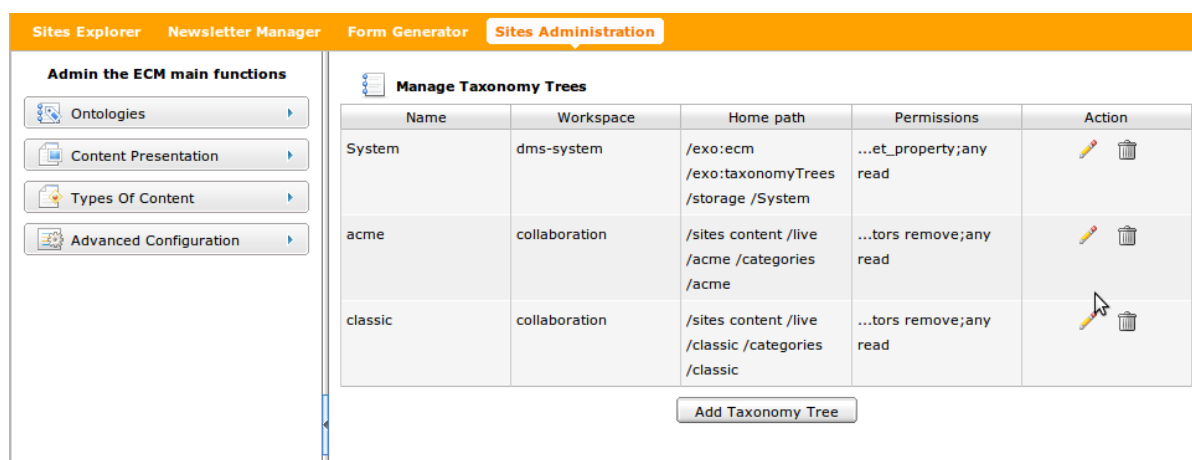
### 4.1 Access eXo WCM Administration

This page is used to manage all workspaces, drives, node types, metadata, templates, queries, etc. Only administrator like "root" can access the WCM Administration.

Click the **Sites Administration** on the Group bar:



The **Sites Administration** will appear like the following illustration:



This section includes:

- **Ontologies:** includes Manage Folksonomy and Manage Taxonomies.
- **Content Presentation:** includes Manage Template, Manage Metadata, Manage Views, Manage Drive.
- **Types of Content:** includes Namespace Registry, Manage Node Type.
- **Advanced Configuration:** includes Manage Queries, Manage Scripts, Create an Action Type.

## 4.2 Ontology

### 4.2.1 Folksonomy Management

The Folksonomy allows you to manage tag styles. The tag style will be changed depending on the number of documents in a tag.

Go to **Sites Administration** → **Ontologies** → **Manage Folksonomy**.

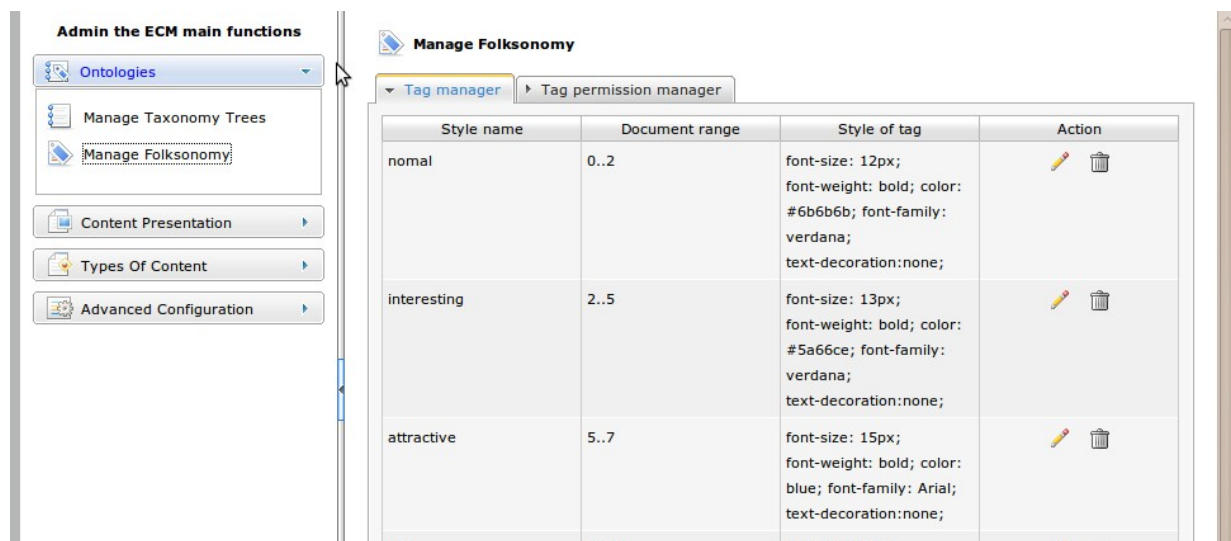


Illustration 138: The Manage Folksonomy form

#### 4.2.1.1 Edit

**Tag manager** tab:

To edit existing tags, do as follows:

**Step 1:** Click the icon that corresponds to the tag name which you want to edit in the **Action** column to edit the tag style configuration. The **Edit tag style configuration** form will appear:

Style name

nomal \*

Document range

0..2 \*

Html style

font-size: 12px; font-weight: bold; color: #6b6b6b; font-family: verdana; text-decoration:none; \*

Update

Cancel

Details:

|                       |  |
|-----------------------|--|
| <b>Style name</b>     | To give the tag name. (*Required).   |
| <b>Document Range</b> | To give the number of documents assigned to the same tag. (*Required).               |
| <b>Html style</b>     | 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.

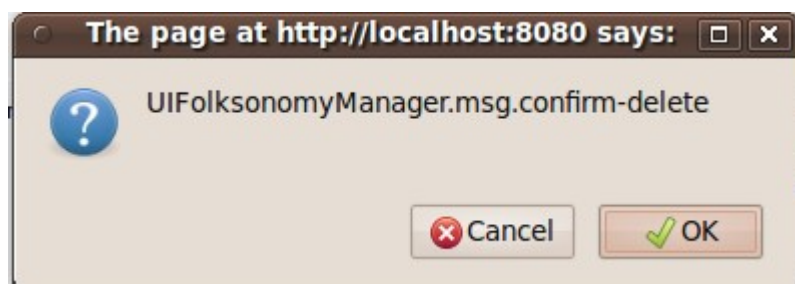
**Step 3:** Click the **Update** button to save new changes or the **Cancel** button to quit this form without changing.



- You can not edit the style name.
- The format of valid range must be: a..b with 'a', 'b' are positive integers. You can use \* instead of 'b' to indicate it is unlimited.
- The 'Html style' text box can not be empty: you can change values of font-size, font-weight, color, font-family, text-decoration.

#### 4.2.1.2 Delete a tag style

An administrator can delete a tag style by clicking the trash icon  that corresponds to the tag style which an administrator wants to delete. There will be a message which confirms the deletion:

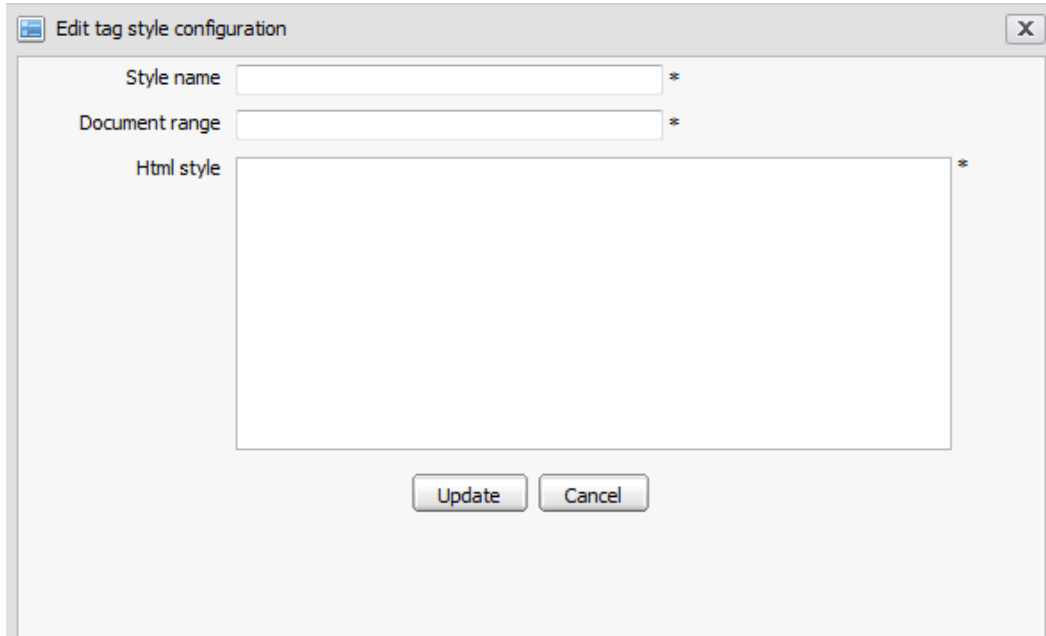


Click the **OK** button to accept deleting or the **Cancel** button to quit without deleting the tag style.

### 4.2.1.3 Add a tag style

Furthermore, an administrator can add a new tag style as follows:

**Step 1:** Click the **Add style** button. The **Edit tag style configuration** form will appear:



The dialog box titled "Edit tag style configuration" has a close button (X) in the top right corner. It contains three input fields, each with an asterisk indicating it is required:

- Style name
- Document range
- Html style

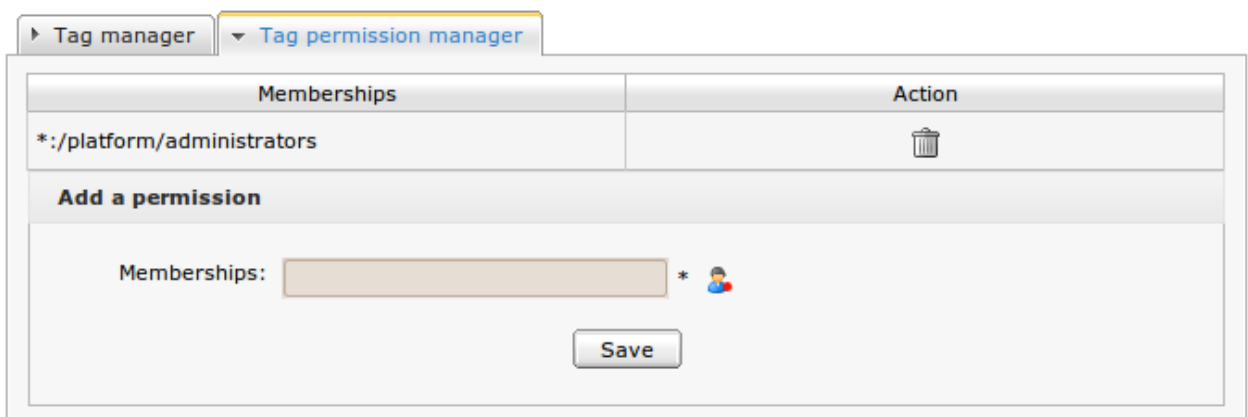
At the bottom of the dialog are two buttons: "Update" and "Cancel".

Illustration 139: 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 the **Update** button to accept adding a new tag style or the **Cancel** button to quit without adding a new tag style.


- The **Tag permission manager** tab: helps administrator set permissions regarding to editing and deleting public tags.



The interface shows two tabs: "Tag manager" and "Tag permission manager". The "Tag permission manager" tab is active, displaying a table with the following structure:

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

Below the table is a section titled "Add a permission" containing a "Memberships:" label, an input field, an asterisk, and a user icon. A "Save" button is located at the bottom of this section.

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

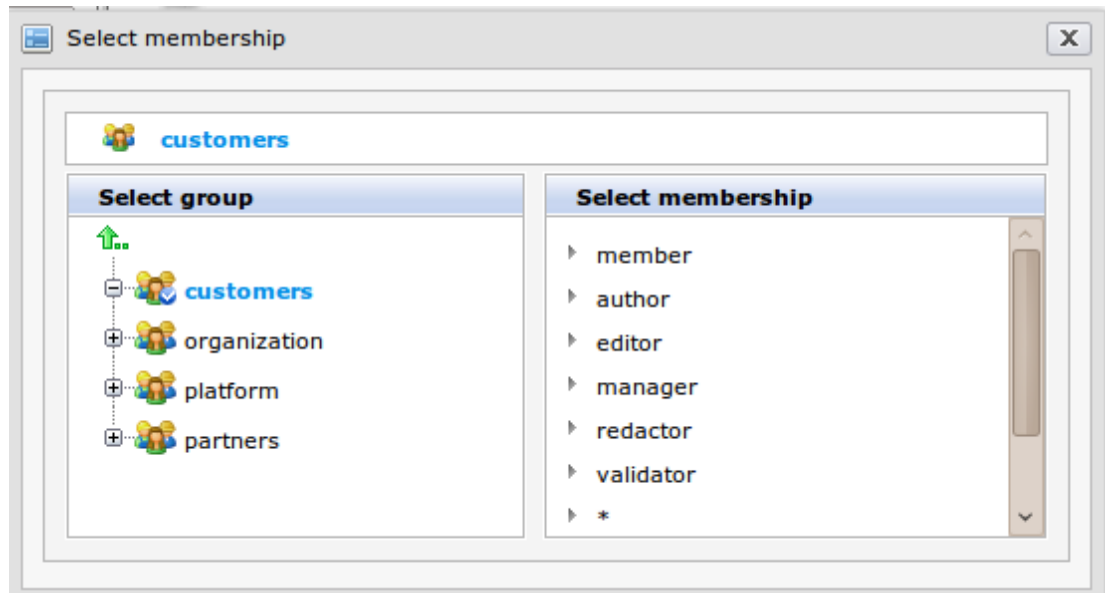
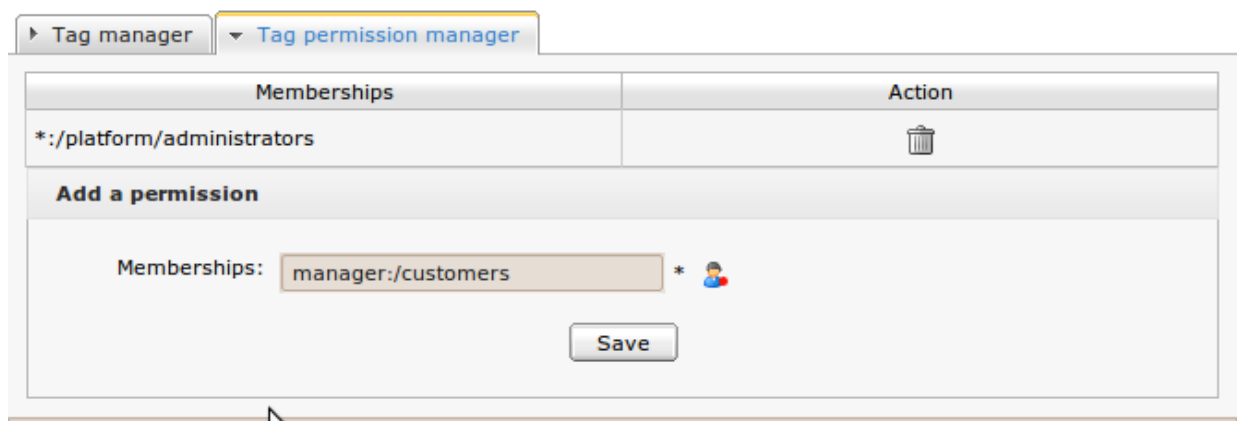


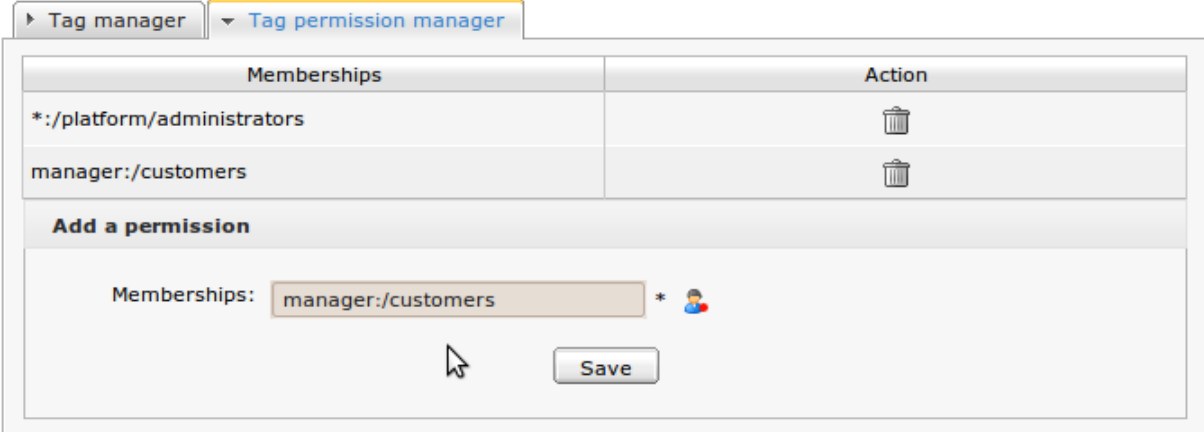
Illustration 140: The Select membership form



**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 the **Save** button 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.



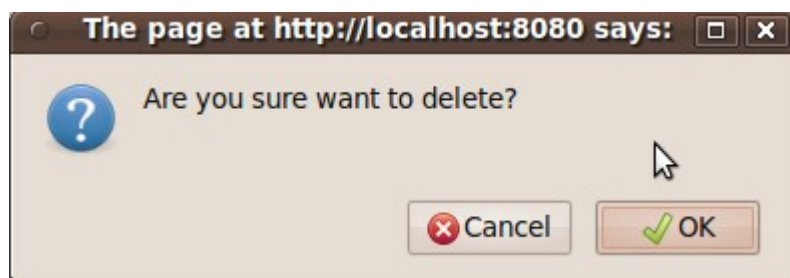


| Memberships               | Action  |
|---------------------------|---|
| */platform/administrators |  |
| manager:/customers        |  |

**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 the **OK** button to accept deleting or the **Cancel** button to quit this form without deleting.

## 4.2.2 Manage Taxonomy Trees

A Taxonomy may be understood as a classification practice and science. It is used to sort documents, aiming at facilitating searches. The Taxonomy management includes adding, editing and deleting a taxonomy tree.

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

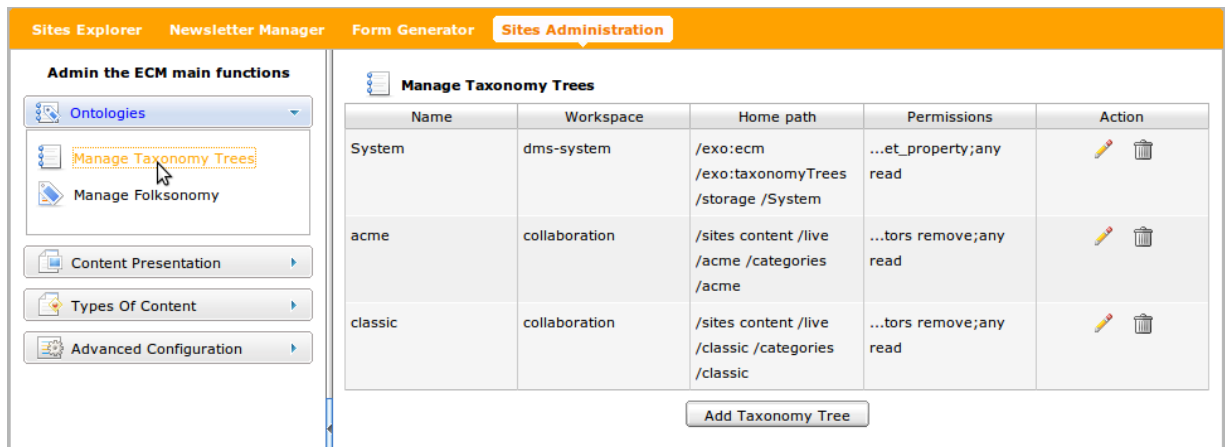


Illustration 141: Manage Taxonomy Trees

#### 4.2.2.1 Add a taxonomy tree

Do the following:

**Step 1:** Click the **Add Taxonomy Tree** button to add a new taxonomy. The **Add taxonomy tree** form will appear:

Input taxonomy name, choose workspace and taxonomy home path

Name  \*

Workspace  ▼

Home path

[Reset](#) [Next](#) [Cancel](#)

Illustration 142: 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 143: The Select home path form

Click the icon if you want to select the root path or click the icon to go to the up level path. Click the icon to expand the folder.

Click the icon corresponding to the path that you want to select as a home path.




Click the **Reset** button if you want to reset values that have just been selected or the **Next** button 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 the **Save** button to save all values or the **Reset** button to change values that have just been set. After clicking the **Save** button, click the **Next** button to go to the next step.

**Step 9:** Enter the name for an action of the taxonomy tree in the **Name** field. (\*Required).

**Step 10:** Select values for **Lifecycle**, **NodeTypes**, **Target workspace**, **Target path**, **Affected Node Types**. (\*Required).

**Step 11:** Click the **Save** button to save all values and click the **Next** button to go to the next step.



*Do not input some special characters in the 'Name' field like: !, @, #, \$, %, &, \*, (, ).*

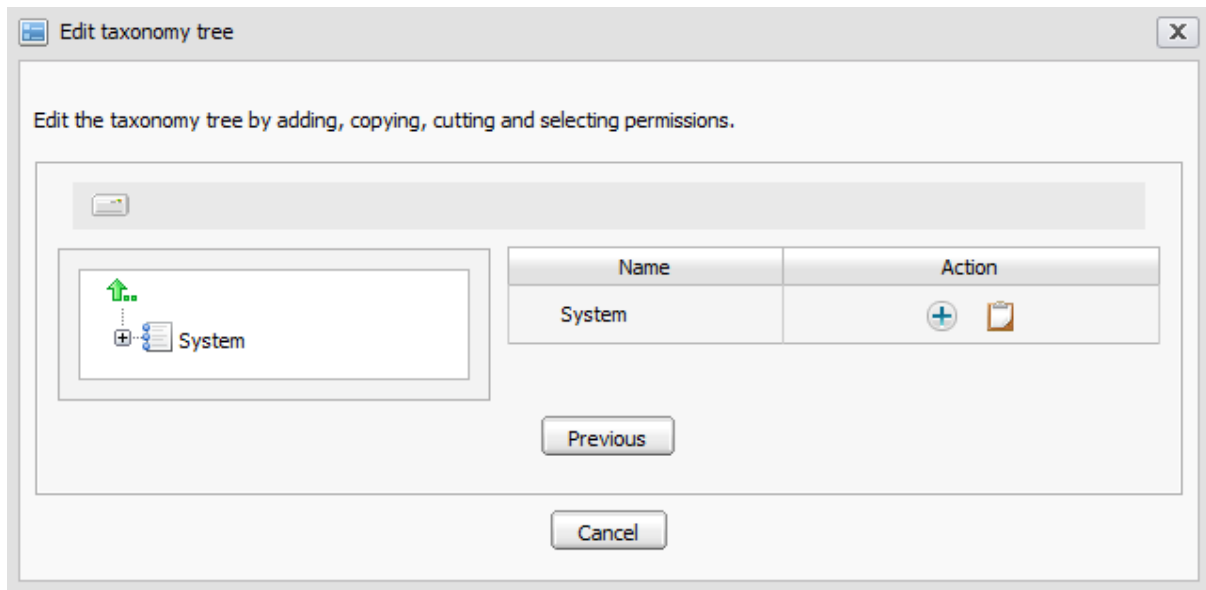
*Do not add a taxonomy which has the same name and level with existing taxonomies in a node.*

*The taxonomy name must contain less than 30 characters.*

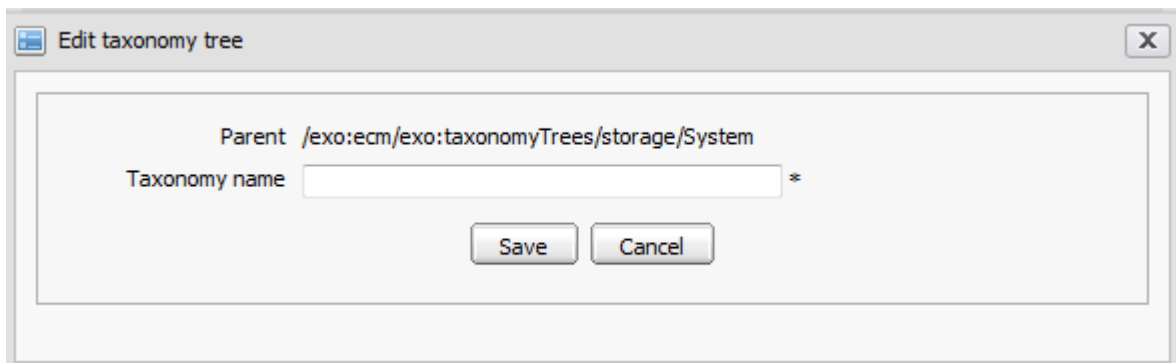
#### 4.2.2.2 Edit a Taxonomy Tree

Do the following:

**Step 1:** Click the edit icon (  ) that corresponds to the taxonomy tree which you want to edit.



**Step 2:** Click the icon to add more taxonomy trees. The Edit taxonomy tree will appear:



**Step 3:** Enter a taxonomy name in the Taxonomy name field. (\*Required).

**Step 4:** Click the **Save** button to save a taxonomy name.

**Step 5:** Click the **Previous** button to return to the previous steps.

**Step 6:** Click the **Save** button to save all changes and the **Previous** or **Next** button 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 the **OK** button on the confirmation message to accept deleting this taxonomy or click **Cancel** button to discard this action.

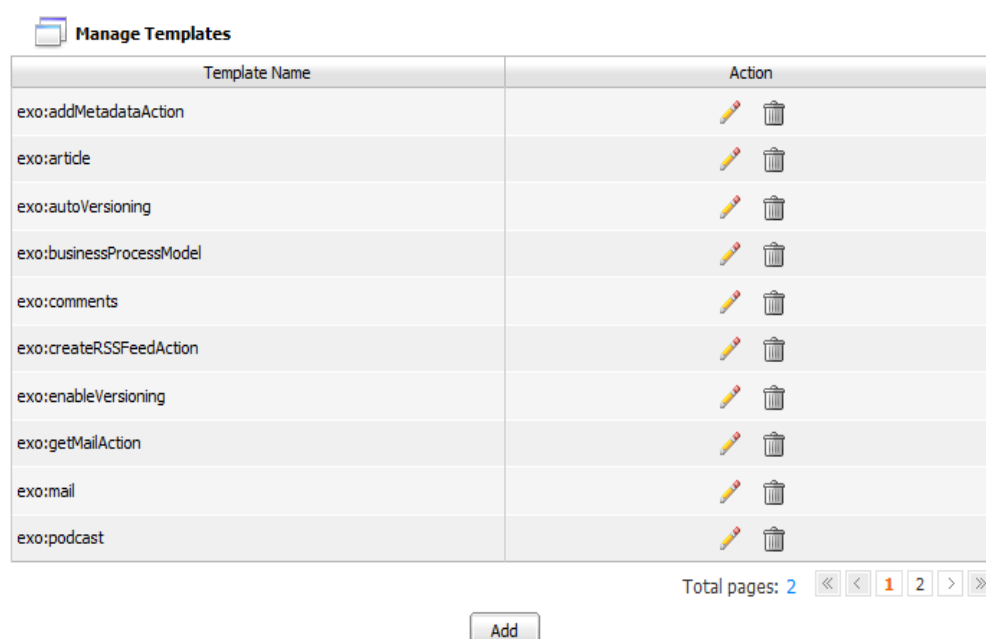
You can not delete taxonomies that have been referenced.

## 4.3 Content Presentation Management





















### 4.3.1 Manage A Template

To create a node in **WCM**, this node must set its properties. Thus, each node needs to have a form for entering data for their properties (called the dialog template), and displaying the existing values (called the view template). The template management allows users to view, delete and modify the predefined templates or to add a new template.

Go to the **Sites Administration** → **Content Presentation** → **Manage Template**



The screenshot shows the 'Manage Templates' interface. It features a table with two columns: 'Template Name' and 'Action'. The table lists ten templates, each with edit and delete icons in the 'Action' column. Below the table, there is a pagination bar showing 'Total pages: 2' and a list of page numbers (1, 2). An 'Add' button is located at the bottom center of the form.

| 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 144: The Manage Templates form

#### 4.3.1.1 Add a new template

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

**Step 1:** Click the **Add** button in the **Manage Templates** form to open the **Template Form**:

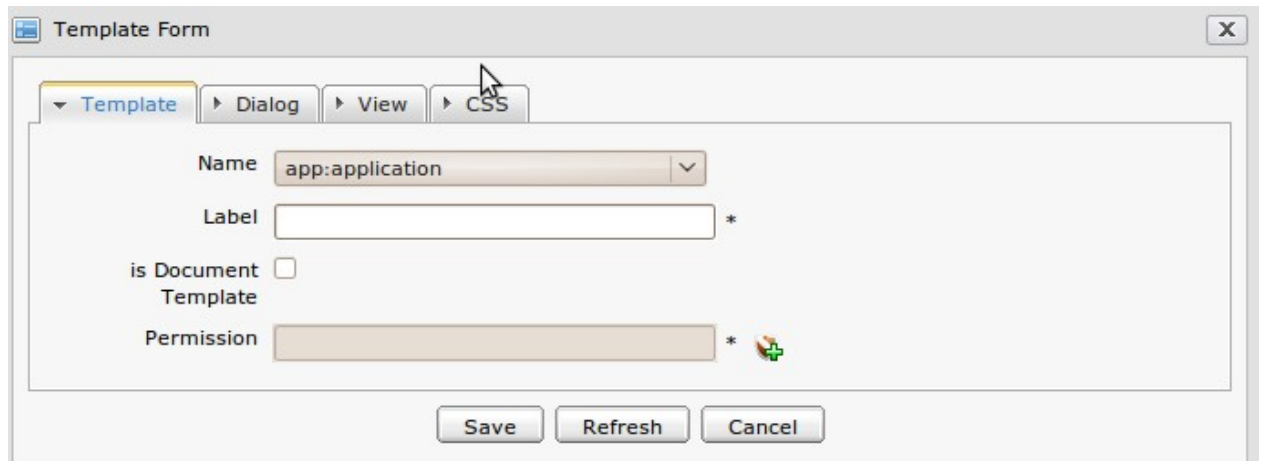
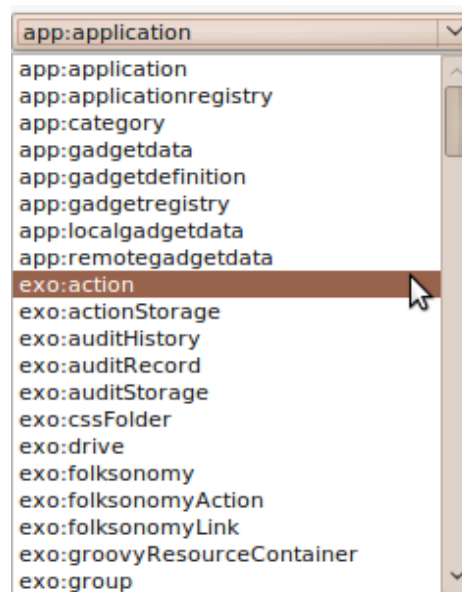


Illustration 145: The New Template form


(\*): 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:



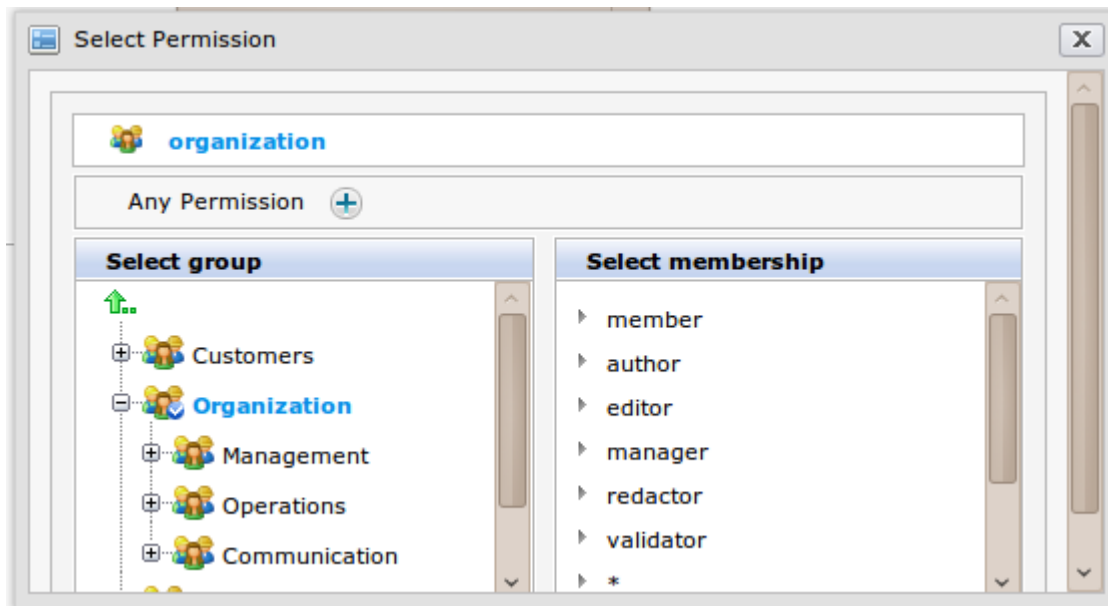


Illustration 146: The Select Permission form

**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..

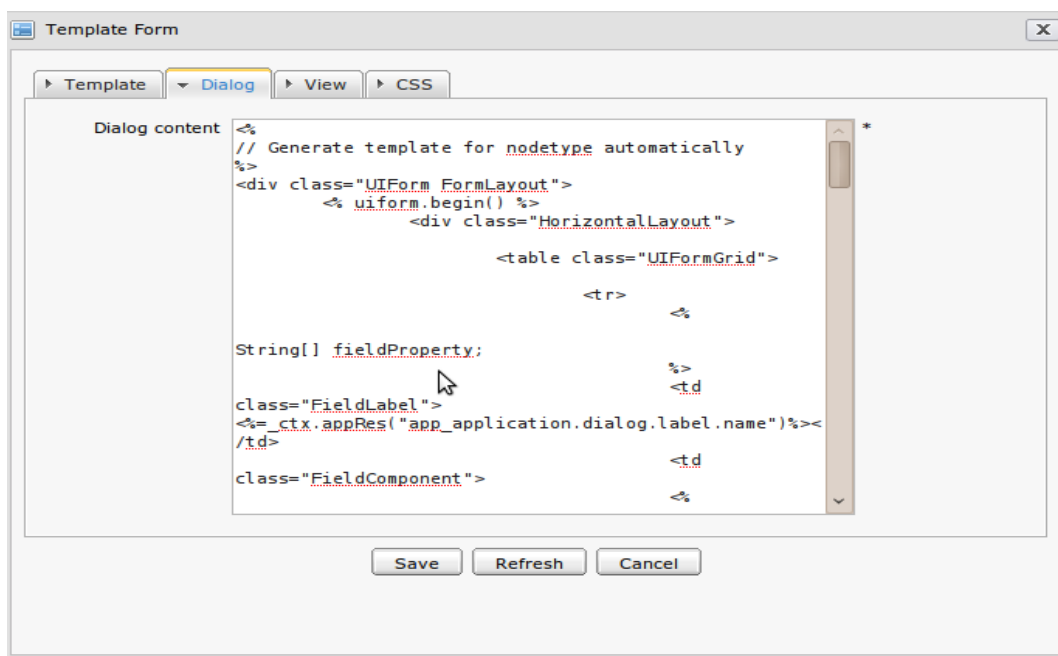


Illustration 147: The Dialog tab

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

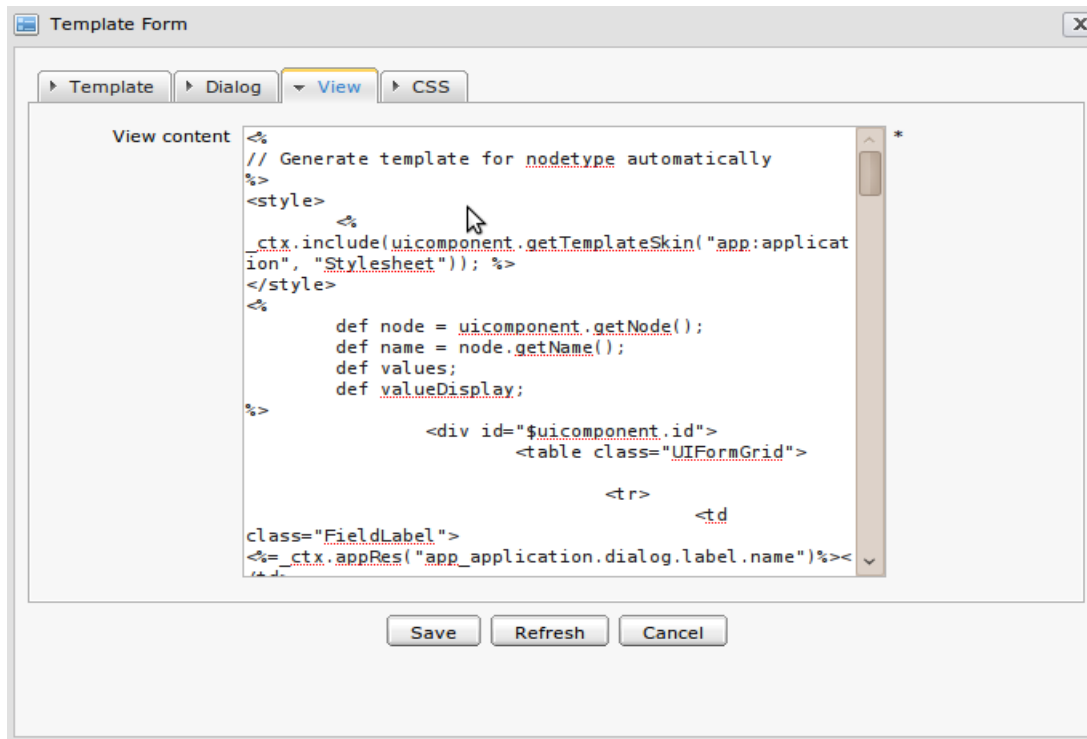


Illustration 148: The View tab

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

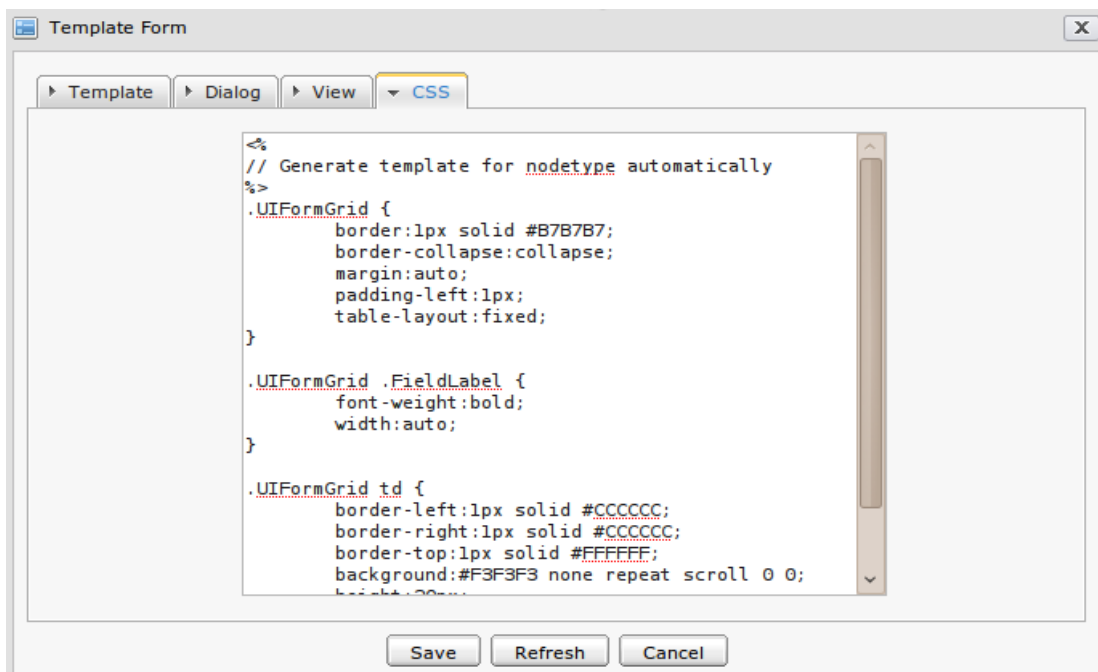



Illustration 149: The CSS tab

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

### 4.3.1.2 Edit a Template

- ✓ To edit a template as follows:

**Step 1:** Click the  icon in the Action column corresponding to the template that you want to edit.

The **View & Edit Template** form will appear like:

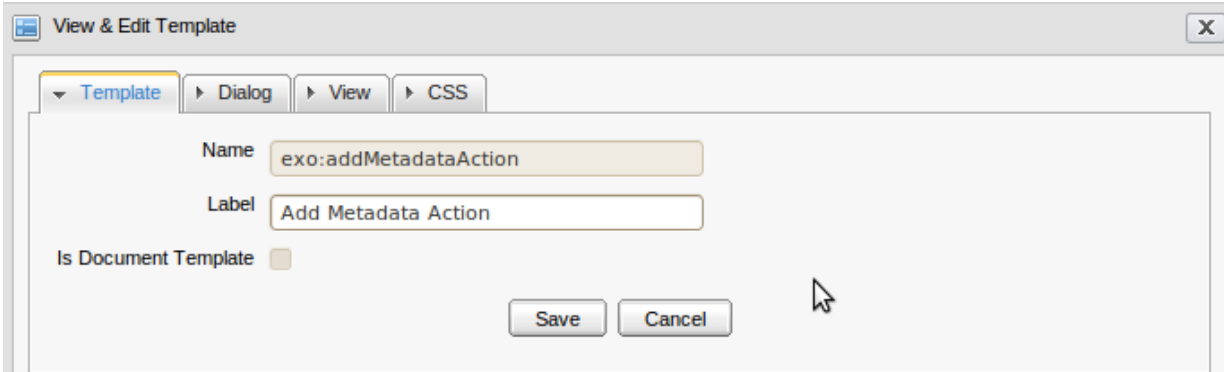
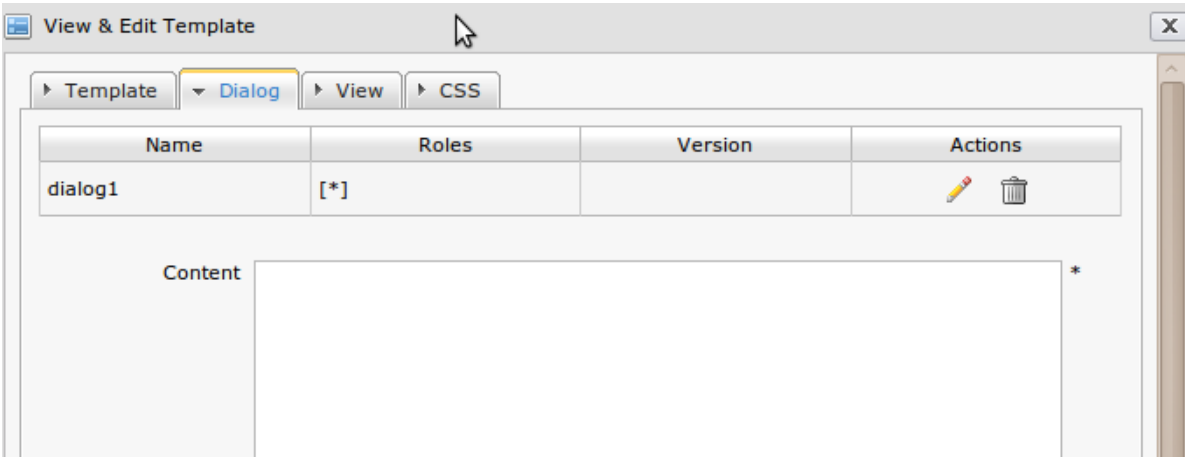




Illustration 150: The View & Edit Template form

**Step 2:** In the **Template** tab, edit the properties that you want.

**Step 3:** In the **Dialog** tab, you can add dialogs, edit or delete them.



| Name    | Roles | Version | Actions   |
|---------|-------|---------|---|
| dialog1 | [ * ] |         |   |

Content \*




- You can not edit the template name.
- You can not check/uncheck in 'Is Document Template' checkbox.
- 'Label' field can be blank.

- ✓ To Add a dialog do as follows:

**Step 1:** Input content for this dialog in the '**Content**' field. Input name for this dialog. (\*Required).

**Step 2:** Select permissions for a group that can use this dialog. (\*Required).

- ✓ To edit a dialog do as follows:

**Step 1:** Click the  icon on a dialog you want to edit.

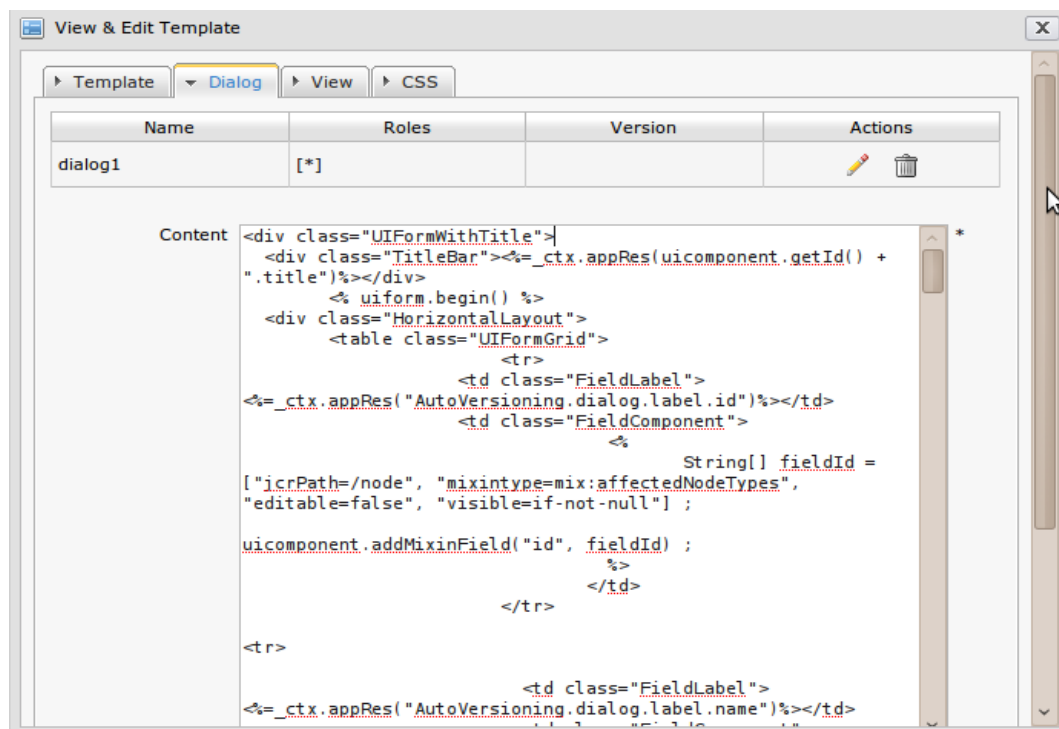


Illustration 151: The Edit a dialog form

**Step 2:** Edit the current dialog's properties.

**Step 3:** Click the **Save** button 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.*

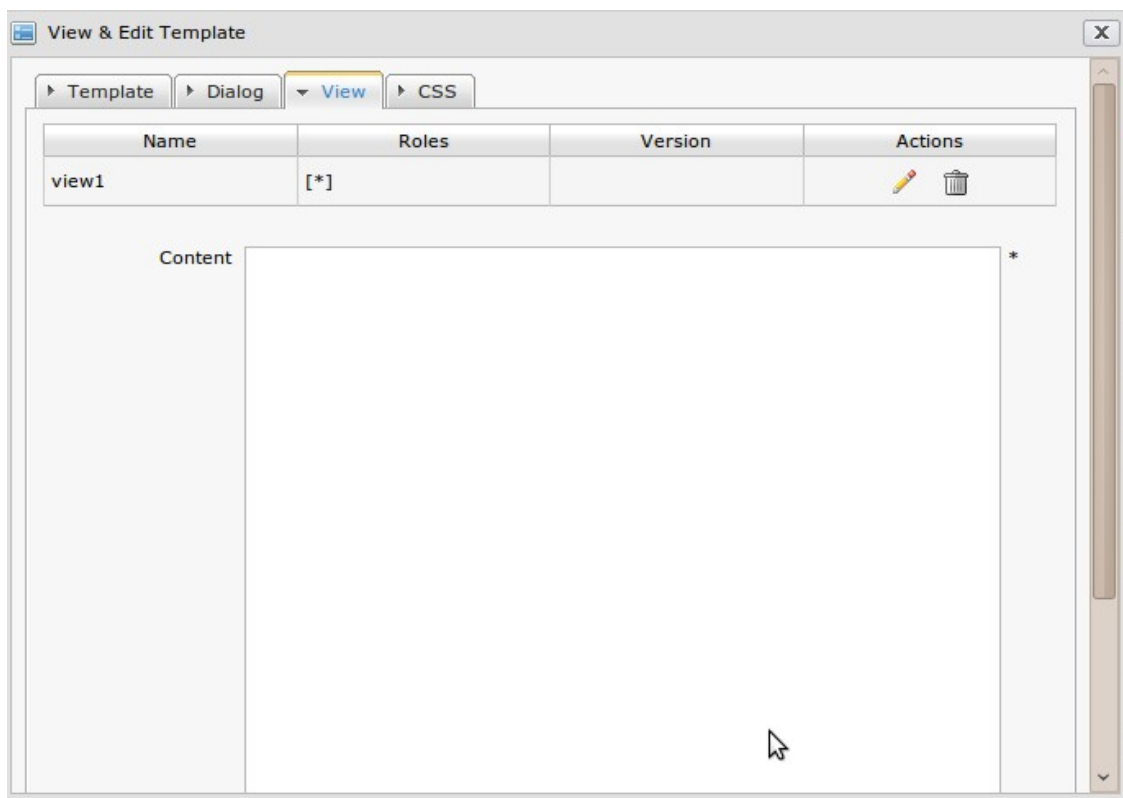
*If the dialog has at least 2 versions, in the **Dialog** tab, it will display Restore button that allows restoring the dialog version.*

- ✓ To delete a dialog, do as follows:

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

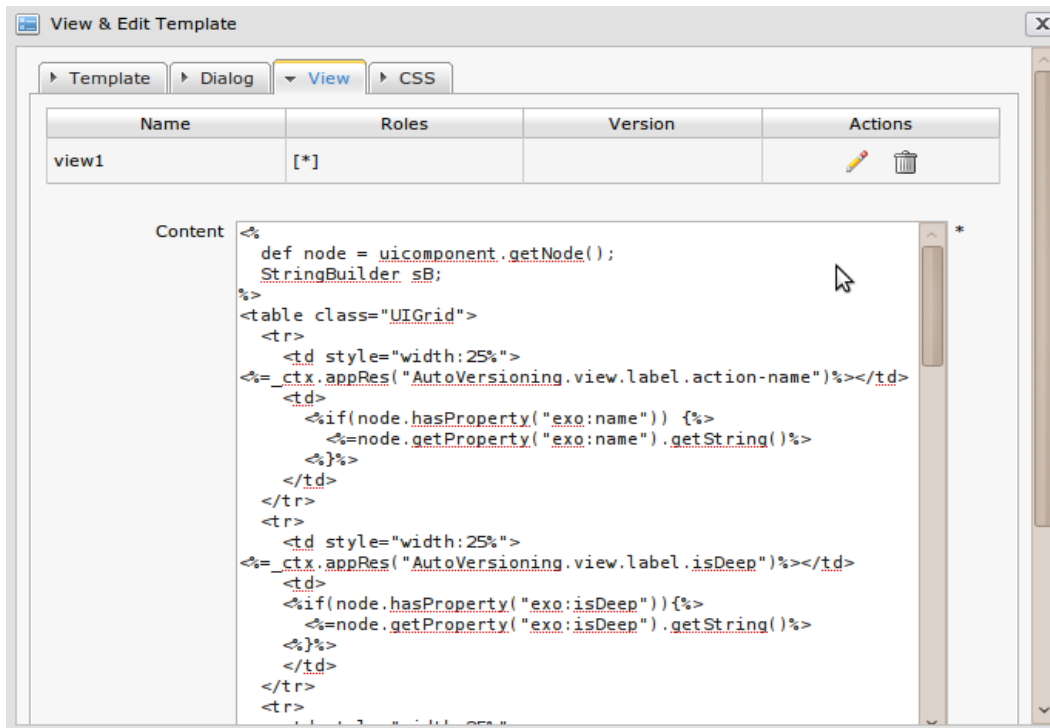
**Step 2:** Click the **OK** button on the confirmation message to accept deleting or click the **Cancel** button to discard this action.

**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 the  icon corresponding to the view that you want to edit.

**Step 2:** Edit the properties of the current view.

**Step 3:** Click the **Save** button 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 click **Save** button. 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 the **OK** button on the confirmation message to accept deleting or click

**Cancel** button to discard this action.

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



*You can not delete the default view.*

✓ To add a CSS, do as follows:

**Step 1:** Click the CSS tab, enter content in the **Content** field. (\*Required).

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

**Step 3:** Select permissions for a group that can use this dialog. (\*Required).

#### 4.3.1.3 Delete a Template

Do the following:

**Step 1:** Click the trash icon  corresponding to the template that you want to delete.

**Step 2:** Click the **OK** button to accept deleting this template or click the **Cancel** button to discard this action.

### 4.3.2 Metadata Management

Metadata have multiple definitions, the most brief one is "data about data." Generally, it may be understood as information that describes, or supplements the central data.

The metadata management allow managing nodes in the metadata format in the **WCM** system. The metadata may be considered as information used to describe the data. When data are provided to the end users, the metadata allow users to understand about information in more details. All metadata nodes can combine with other nodes to create a new node (add mix).

This section includes Viewing Metadata, Editing and Deleting functions.

Go to **Sites Administration** → **Content Presentation** → **Manage Metadata**

#### 4.3.2.1 View Metadata

Do the following:

**Step 1:** Click the  icon corresponding to the metadata that you want to view.

The Metadata information form will appear:

| Metadata Name | Is mixin types | Orderable children |
|---------------|----------------|--------------------|
| dc:elementSet | ✓ true         | ✗ false            |


  

| Element Name | Type            | Description |
|--------------|-----------------|-------------|
| CV           | dc:coverage     | String      |
| RT           | dc:resourceType | String      |
| CR           | dc:creator      | String      |
| DS           | dc:description  | String      |
| LG           | dc:language     | String      |
| PD           | dc:publisher    | String      |
| SB           | dc:subject      | String      |
| CB           | dc:contributor  | String      |
| SC           | dc:source       | String      |
| R            | dc:rights       | String      |
| TI           | dc:title        | String      |

Illustration 152: The Metadata information form

### 4.3.2.2 Edit Metadata

Do the following:

**Step 1:** Click the  icon corresponding to the metadata that you want to edit.

The Edit Metadata's Template form will appear:

Metadata name: dc:elementSet

Permission: \*

Buttons: Apply, Cancel

Illustration 153: 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 the **Apply** button to finish all changes.



### 4.3.2.3 Delete Metadata

Do the following:

**Step 1:** Click the trash icon  corresponding to the metadata that you want to delete.

A confirmation message will appear.

**Step 2:** Click the **OK** button to accept deleting this template or click the **Cancel** button to discard this action.

## 4.3.3 Manage Views

The function **Manage View** is used to control view ways of a user. It has 3 tabs: View, **WCM** Templates and BC Templates tabs.

Go to **Sites Administration** → **Content Presentation** → **Manage View**































| Views          |                                |  |              |   |
|----------------|--------------------------------|--|--------------|---|
| ECM Templates  |                                |  |              |   |
| BC Templates   |                                |  |              |   |
| Name           | Permissions                    | Action Tab                                       | Base Version | Action  |
| taxonomy-list  | *:/platform/users              | [ Info ] [ Actions ]                             |              |          |
| admin-view     | *:/platform<br>/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<br>/administrators | [ Info ]   |              |    |
| timeline-view  | *:/platform<br>/administrators | [ Actions ] [ Collaboration ]                    |              |    |
| cover-flow     | *:/platform/users              | [ Actions ] [ Collaboration ]                    |              |    |
| Add View       |                                |  |              |   |

Illustration 154: The manage view form

### 4.3.3.1 View

#### a) Add a new view

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

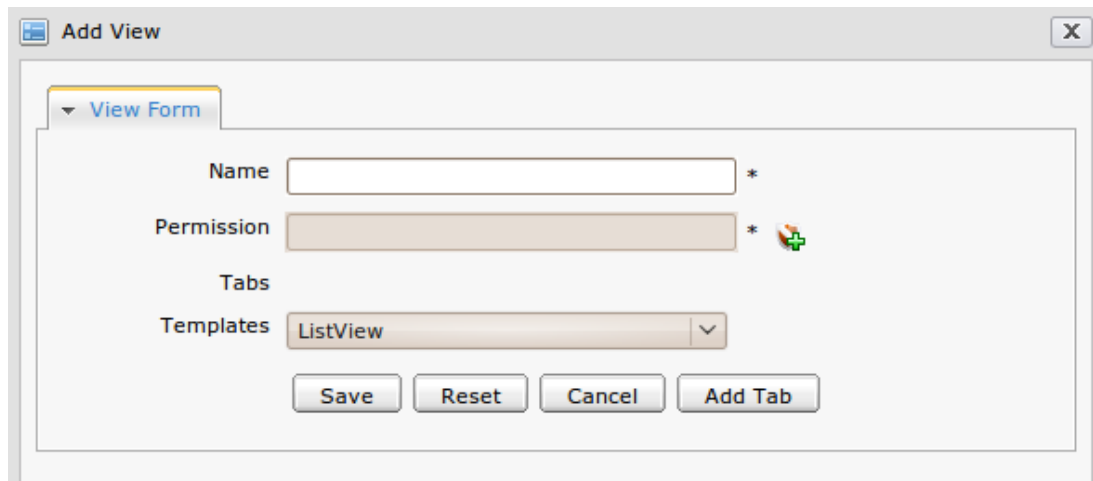


Illustration 155: The Add View form


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

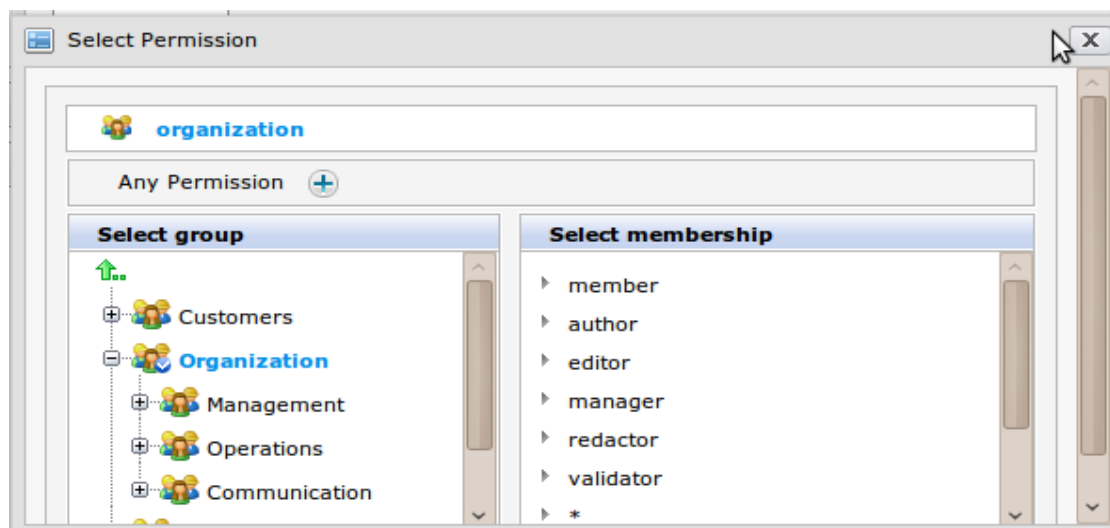
**Step 2:** Enter the new view name in the **Name** field. (\*Required).



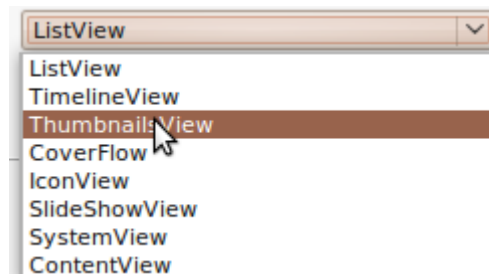
*The name must be unique.*

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

**Step 3:** Click the  icon to set permissions in this view. The **Select Permission** form will appear:



**Step 4:** Select a group in the list on the left panel and a specific membership on the right panel. The selected users will have access permissions to this view.



**Step 5:** Click the  icon in the **Templates** field and select a template for this view.

## b) Preview a view

Do the following:

**Step 1:** Click the  icon in the **Action** column corresponding to the view which you want to preview.


The **View** form will appear:

Illustration 156: The View form

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

**c) Edit a view**

Do as follows:

**Step 1:** Click the  icon corresponding to the view that you want to edit. The **Edit View** form appears:

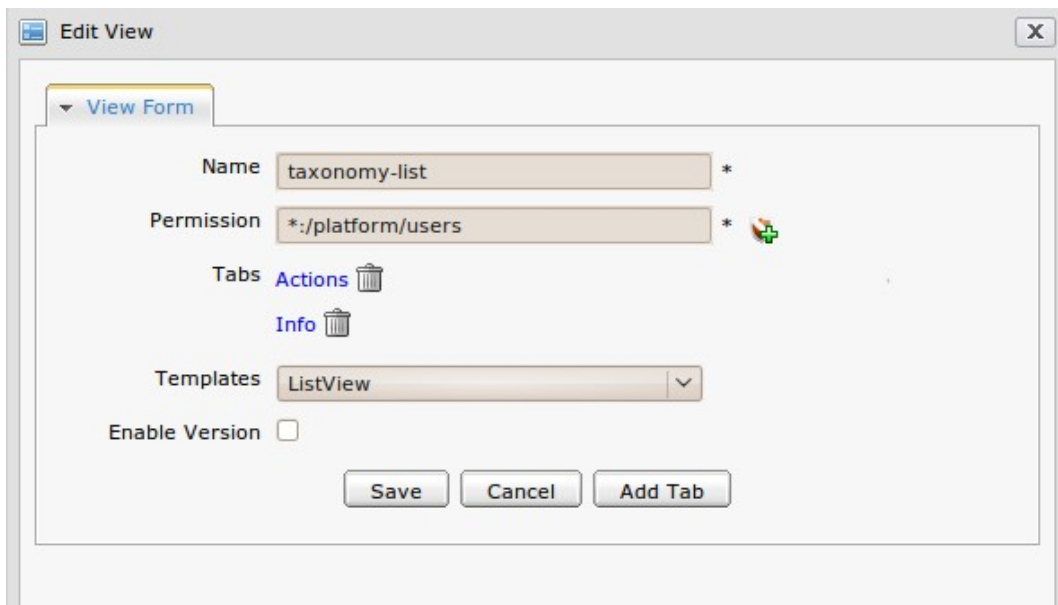


Illustration 157: The Edit View form

**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 click Save button. 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 the **Save** button to accept all changes or click **Cancel** button to quit without changes.

**d) Delete a view**

Do the following:

**Step 1:** Click the  icon that corresponds to the view which you want to delete. A confirmation message will appear.

**Step 2:** Click the **OK** button to accept deleting or click the **Cancel** button to discard this action.



*You can not delete a view which is in use.*

**4.3.3.2 ECM Templates****Manage View**















| <div> <div>Views</div> <div>ECM Templates</div> <div>BC Templates</div> </div> |  |              |   |
|--|--|--------------|---|
| Name   | Value  | Base Version | Action  |
| CoverFlow  | /exo:ecm/views/templates<br>/ecm-explorer/CoverFlow      |              |   |
| IconView   | /exo:ecm/views/templates<br>/ecm-explorer/IconView       |              |   |
| ListView   | /exo:ecm/views/templates<br>/ecm-explorer/ListView       |              |   |
| SlideShowView  | /exo:ecm/views/templates<br>/ecm-explorer/SlideShowView  |              |   |
| SystemView   | /exo:ecm/views/templates<br>/ecm-explorer/SystemView     |              |   |
| ThumbnailsView   | /exo:ecm/views/templates<br>/ecm-explorer/ThumbnailsView |              |   |
| TimelineView   | /exo:ecm/views/templates<br>/ecm-explorer/TimelineView   |              |   |
| <div>Add</div>   |  |              |   |

Illustration 158: ECM Templates

**a) Add a new ECM Template**

Do as follows:

**Step 1:** Select the **ECM Templates** tab.

**Step 2:** Click the **Add** button to open the **Add ECM Template** form:

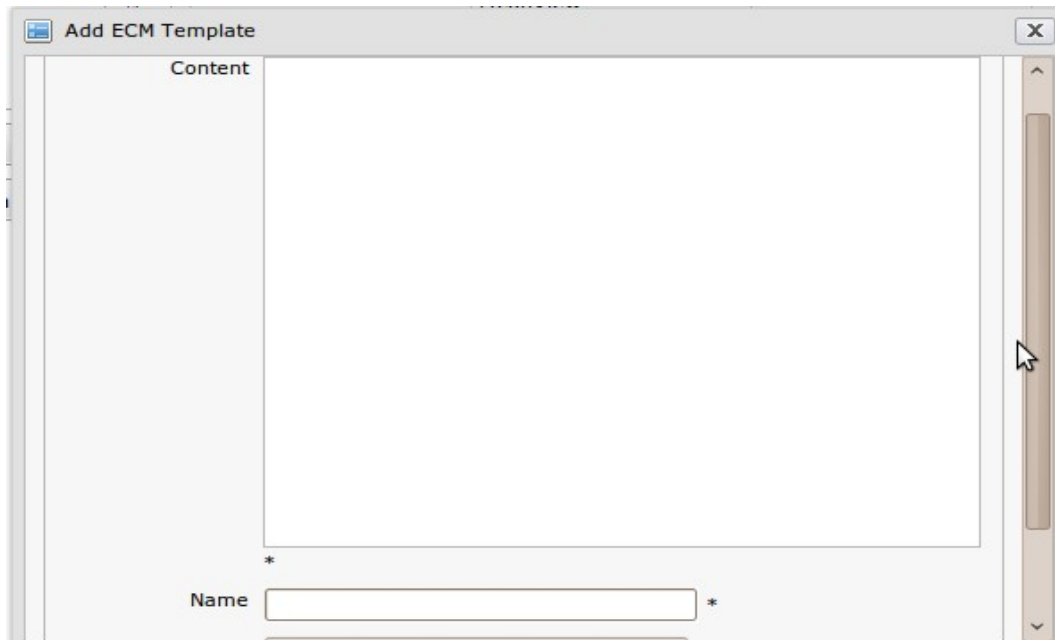


Illustration 159: The Add ECM Template form

(\*):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 the **Save** button to accept adding a new template or click the **Reset** button to change values or **Cancel** to quit without any changes.



*The name of templates must be unique.*

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

## b) Edit a template

Do as follows:

**Step 1:** Click the  icon that corresponds to the template you want to edit.

The **Edit ECM Template** form will appear:

```

uiWorkingArea.getCustomAction();
def managersMultiItemContext =
uiWorkingArea.getMultiActionsExtensionList();
def managersGroundContext =
uiWorkingArea.getGroundActionsExtensionList();
def action = "";
def permLinkComponent = null;

UIRightClickPopupMenu contextMenu =
uicomponent.getContextMenu() ;
String componentId = uicomponent.getId();
java.text.DateFormat dateFormat =
uicomponent.getSimpleDateFormat();
def viewComponentId = new Date().getTime();
def rcontext = ctx.getRequestContext();

```

Name  \*

Template Type

Enable Version ☐

Illustration 160: The Edit ECM Template form

**Step 2:** Change the current template's properties.

**Step 3:** Click the **Save** button 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 click Save button. It is displayed at the 'Base version' column in **ECM Template** tab.*

*If the template has at least 2 versions, in the 'Edit ECMTemplate' form, it displays the Restore button that allows restoring the template version.*

### c) Delete a template

Do as follows:

**Step 1:** Click the  icon corresponding to the template you want to edit. A confirmation message will appear.

**Step 2:** Click the **OK** button to accept deleting this template or click the **Cancel** button to discard this action.

### 4.3.3.3 BC Templates











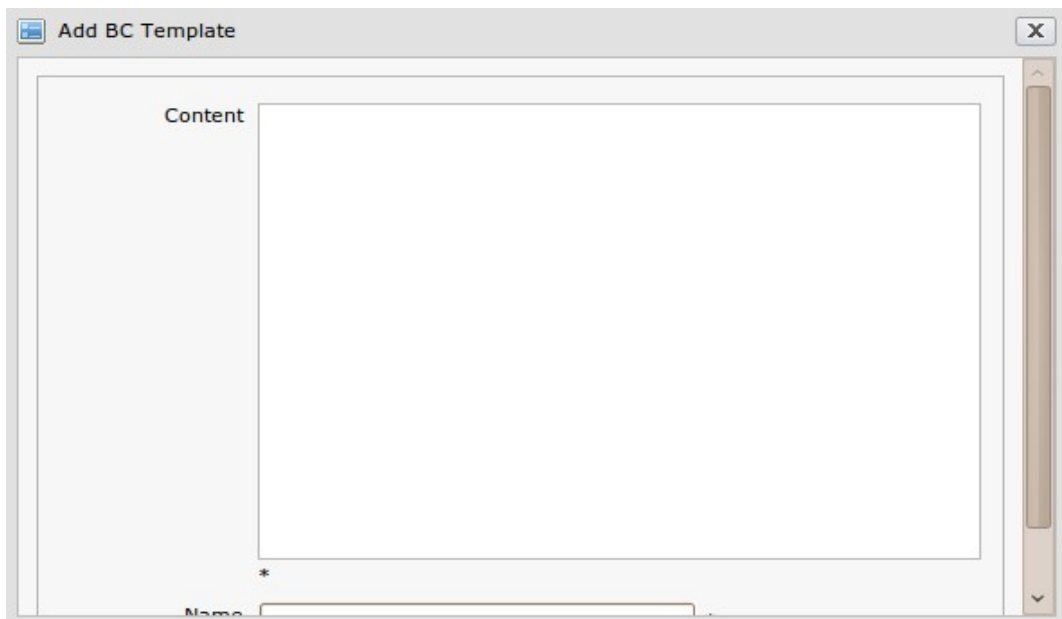
| Views   ECM Templates <b>BC Templates</b> |   |              |   |
|---|---|--------------|---|
| Name                                      | Value   | Base Version | Action  |
| DocumentView                              | /exo:ecm/views/templates<br>/content-browser/detail-<br>document/DocumentView |              |   |
| PathList                                  | /exo:ecm/views/templates<br>/content-browser/path/PathList                    |              |   |
| QueryList                                 | /exo:ecm/views/templates<br>/content-browser/query<br>/QueryList              |              |   |
| ScriptList                                | /exo:ecm/views/templates<br>/content-browser/script<br>/ScriptList            |              |   |
| TreeList                                  | /exo:ecm/views/templates<br>/content-browser/path/TreeList                    |              |   |
| <div>Add</div>                            |   |              |   |

Illustration 161: BC Templates

#### a) Add a new BC Template

Do as follows:

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




The image shows a web form titled "Add BC Template" with a close button (X) in the top right corner. The form contains a large text area labeled "Content" and a text input field labeled "Name" at the bottom. A red asterisk (\*) is positioned to the left of the "Name" label, indicating it is a required field. The form is set against a light gray background with a vertical scrollbar on the right side of the content area.

Illustration 162: 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 the  icon in the **Template Type** field.



**Step 5:** Click the **Save** button to complete adding a new template.




*The name must be unique.*

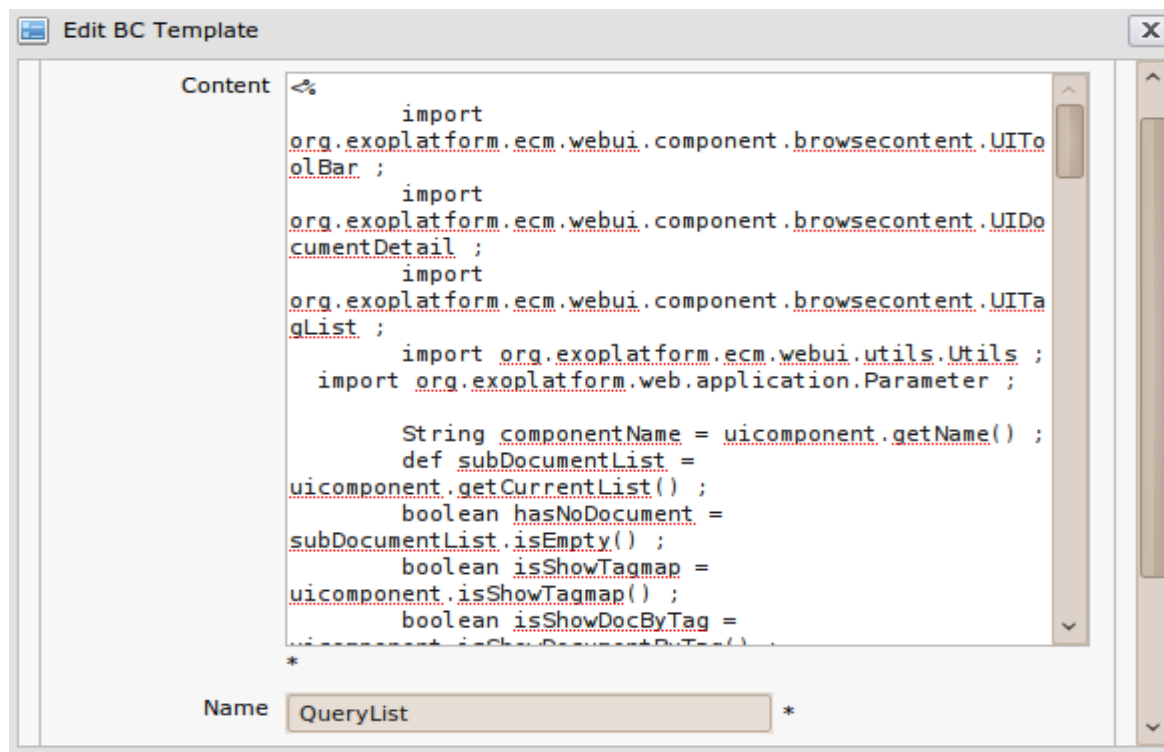
*The name must not contain special case like !, @, #, \$, %, &, \*, (, ).*

## b) Edit a template

Do as follows:

**Step 1:** Click the  icon on a template that you want to edit.

The **Edit BC Template** form will appear:



**Edit BC Template**

**Content**

```

import
org.exoplatform.ecm.webui.component.browsecontent.UITo
olBar ;
import
org.exoplatform.ecm.webui.component.browsecontent.UIDo
cumentDetail ;
import
org.exoplatform.ecm.webui.component.browsecontent.UITa
gList ;
import org.exoplatform.ecm.webui.utils.Utils ;
import org.exoplatform.web.application.Parameter ;

String componentName = uicomponent.getName() ;
def subDocumentList =
uicomponent.getCurrentList() ;
boolean hasNoDocument =
subDocumentList.isEmpty() ;
boolean isShowTagmap =
uicomponent.isShowTagmap() ;
boolean isShowDocByTag =
uicomponent.isShowDocByTag() ;

```

**Name**  \*

Illustration 163: The Edit BC Template form

**Step 2:** Edit the properties of the current BC Template.

**Step 3:** Click the **Save** button 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 click Save button. It is displayed at the 'Base version' column in the 'BCTemplate' tab.*

*If the template has at least 2 versions, in the **Edit BC Template** form, it displays the Restore button that allows restoring the template version.*

### c) Delete a template

Do as follows:


**Step 1:** Click the  icon corresponding to a template you want to edit. The confirmation message will appear.





**Step 2:** Click the **OK** button to accept deleting this template or click **Cancel** button to discard this action.





## 4.3.4 Drives Management

The function is used to manage drives in the File Explorer. It allows adding, editing and deleting drives.

Go to **Sites Administration** → **Content Presentation** → **Manage Drives**

 **Manage Drives**

| Icon | Name                                       | Workspace     | Home Path                             | Permissions                    | View                                     | Action  |
|------|--|---------------|---------------------------------------|--------------------------------|--|---|
|      | Trash                                      | collaboration | /Trash                                | *:/platform<br>/administrators | icon-view,<br>simple-view,<br>cover-flow |   |
|      | Validation<br>Requests<br>Documents Center | collaboration | /Documents<br>/Validation<br>Requests | *:/platform/users              | simple-view,<br>admin-view               |   |

Total pages: 4   1 2 3 4  

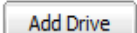


Illustration 164: Manage Drives

#### 4.3.4.1 Add a new drive

Do as follows:

**Step 1:** Click the **Add Drive** button in the **Manage Drives** form to open the **Add Drive** form.

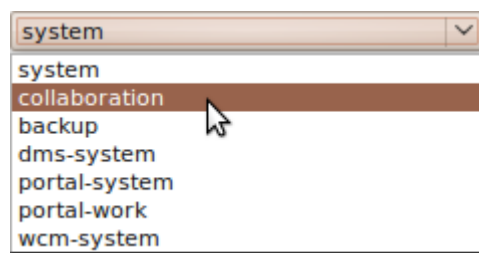
The 'Add Drive' form contains the following elements:


- Name:** A text input field with an asterisk indicating it is required.
- Workspace:** A dropdown menu currently showing 'system'.
- Home path:** A text input field with a green plus icon for file selection.
- Workspace icon:** A text input field with a blue plus icon for file selection.
- Permissions:** A text input field with an asterisk, a green plus icon, and a trash icon.
- Show referenced documents:** ☐
- Show "non document" nodes:** ☐
- Show sidebar:** ☐
- Show hidden nodes:** ☐
- Allowance to create folder:** A list box containing: 'exo:jsFolder', 'Unstructured folder', 'exo:webFolder', 'exo:linkFolder', 'exo:cssFolder', and 'Folder'.
- Allowance nodetype on left tree:** A text input field with a blue plus icon and a trash icon.
- Buttons:** 'Save', 'Refresh', and 'Cancel' at the bottom.

Illustration 165: 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 .

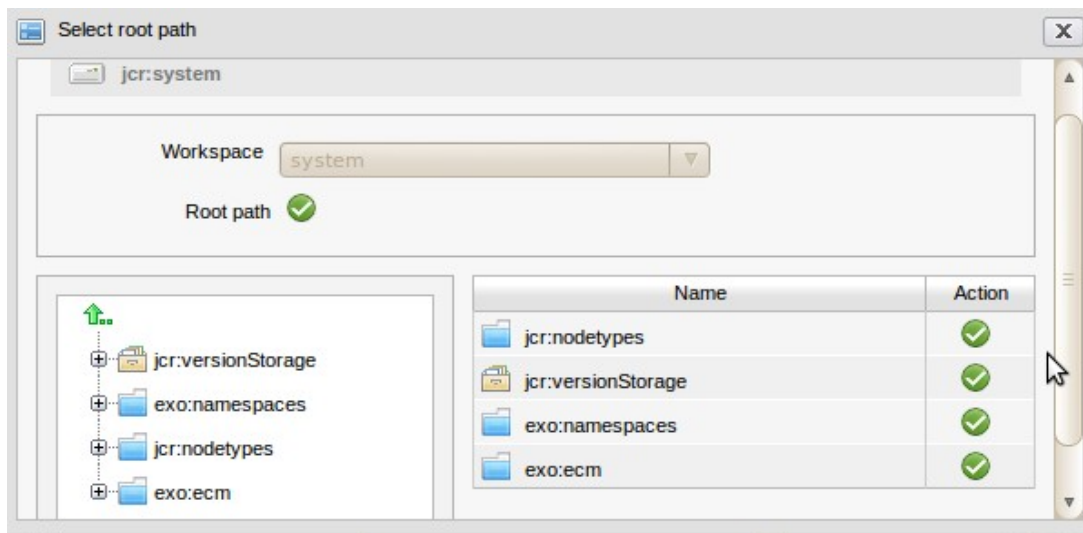




Illustration 166: The Select root path form

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

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

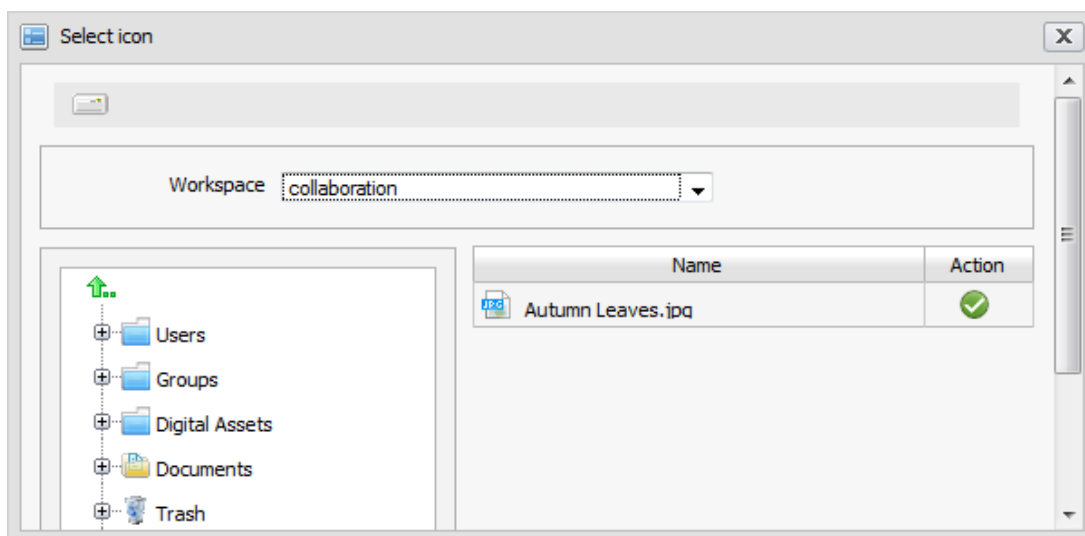

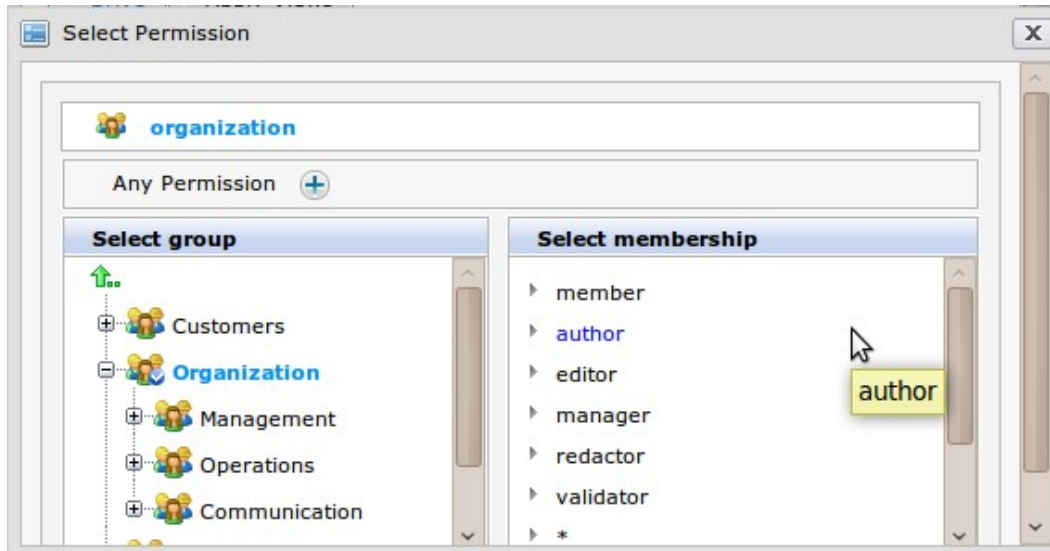


Illustration 167: The Select icon form

**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.

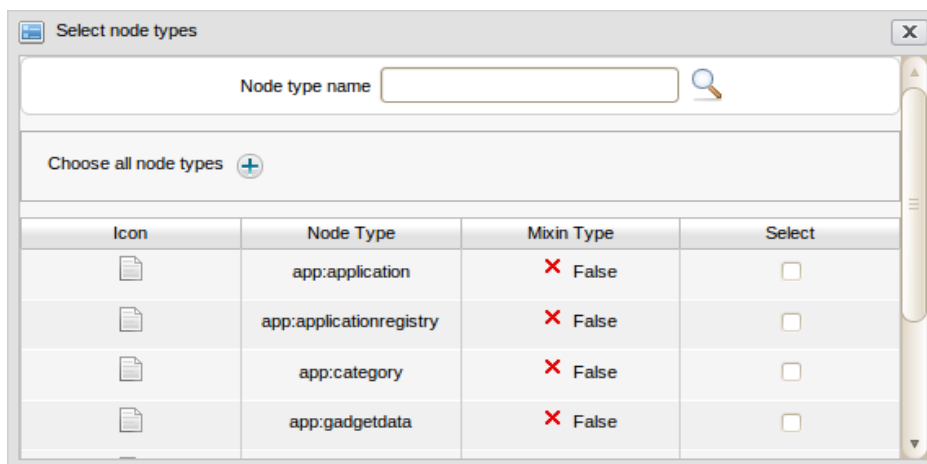
- Show referenced document: allows viewing preference documents.
- Show non-document: allows viewing non-documents.
- Show sidebar: allows showing the sidebar.
- Show hidden node: allows showing the hidden nodes.

**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

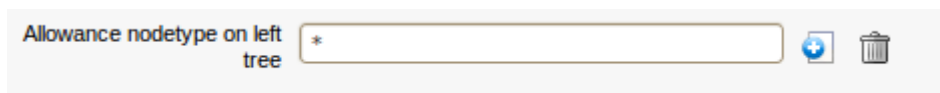
**Step 11:** Select a node type by clicking on the  icon

The select node types form will appear like the illustration below:

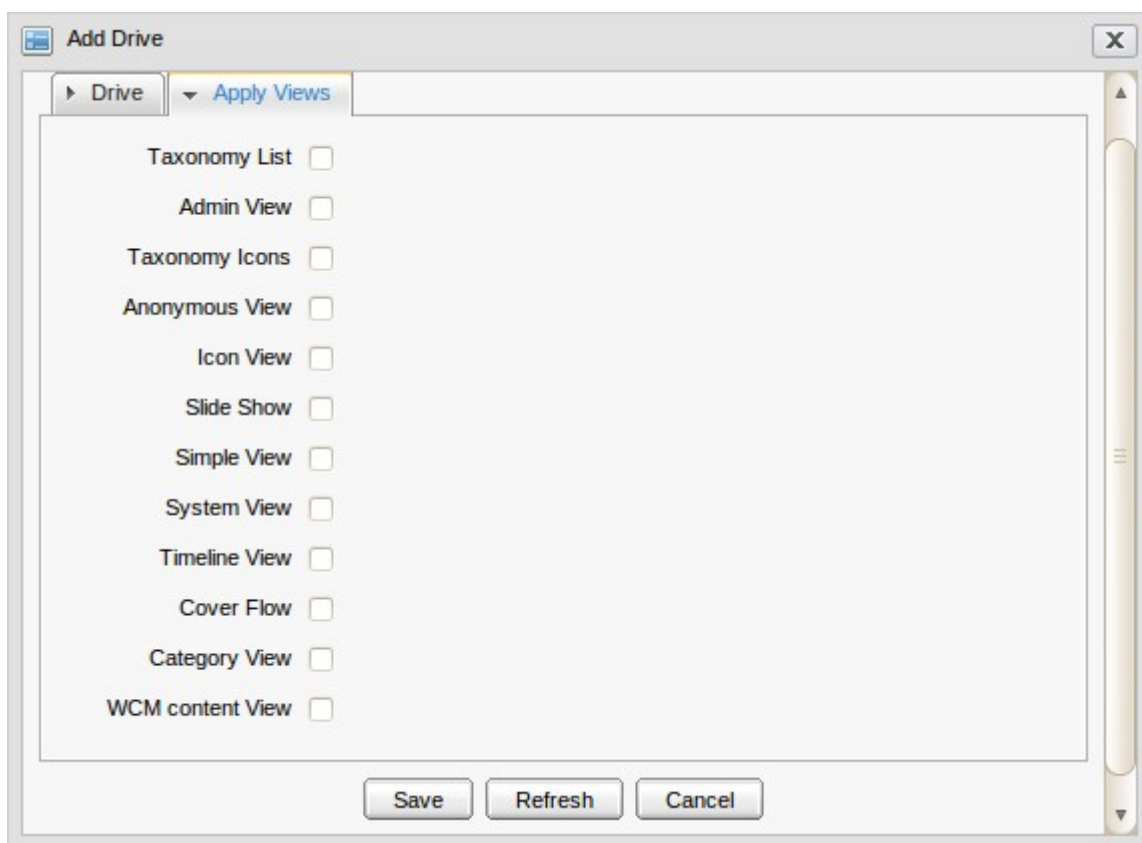


In this step, you can enter the name you need to search in the field '**Node type name**'. Then, click the magnifying glass icon to start searching. All the node types containing the search string will be displayed below.

Mark the checkbox corresponding to the desired node type in the Select column or click the icon to choose all node types. If you click the icon , the **star** icon will appear in the field 'Allowance nodetype on left tree'.



Click the trash icon if you want to remove the selected nodetype.




**Step 11:** Select the **Apply Views** tab.

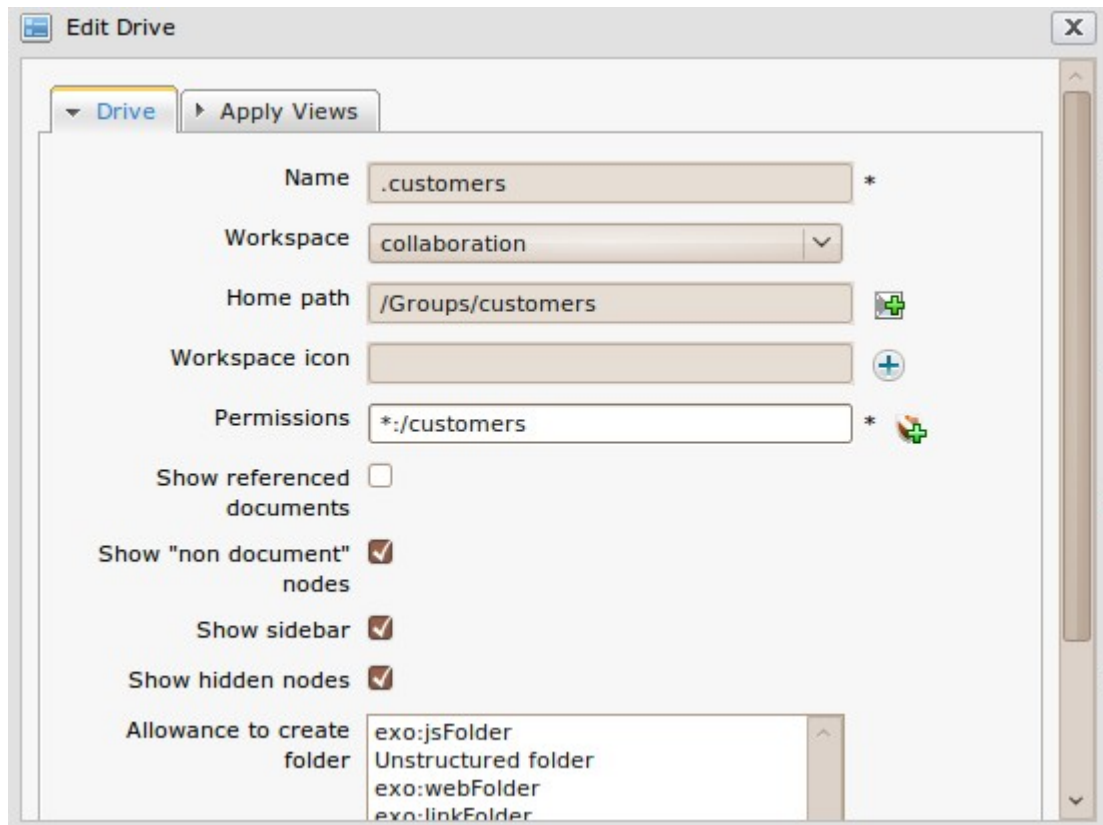
**Step 12:** Select the view type that you want to be available in drive.

**Step 13:** Click the **Save** button to finish adding a new drive.

#### 4.3.4.2 Edit a drive

Do as follows:

**Step 1:** Click the  icon that corresponds to the drive that you want to edit. The **Edit drive** form will appear:



**Step 2:** Edit the properties of the current drive.


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



*You can not edit the drive name.*

#### 4.3.4.3 Delete a drive

Do as follows:

**Step 1:** Click the  icon corresponding to the drive that you want to delete. A confirmation message will appear.

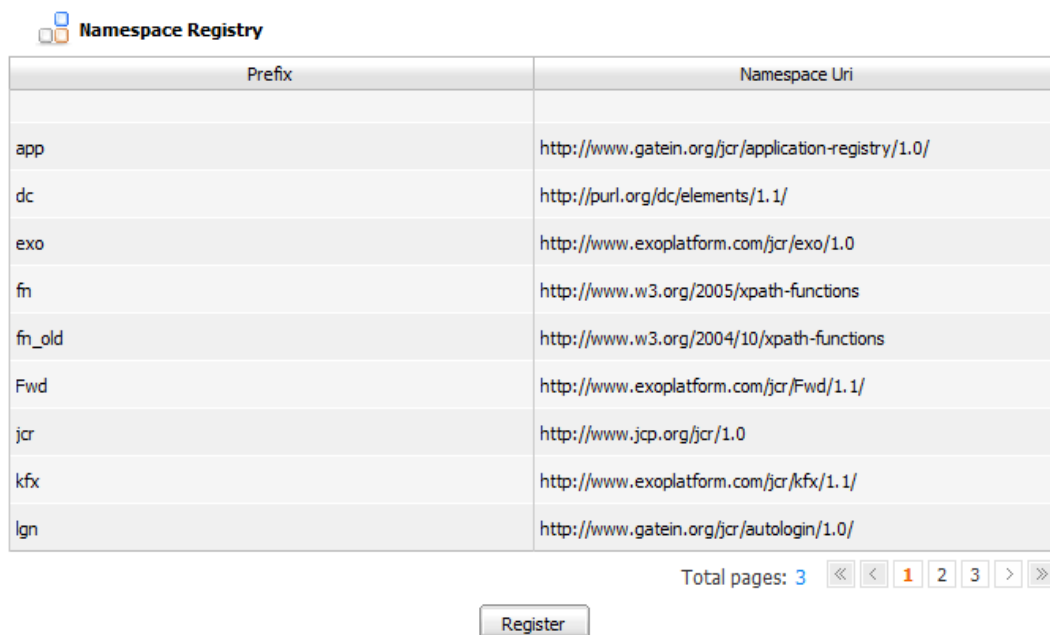
**Step 2:** Click the **OK** button to accept deleting this drive or click the **Cancel** button to discard this action.

## 4.4 Types of Content

### 4.4.1 Namespace Registry

The namespace is used as a prefix of node type that describes all the node type properties. This function allows users to register the namespace used in the system.

Go to **Sites Administration** → **Types of Content** → **Namespace Registry**



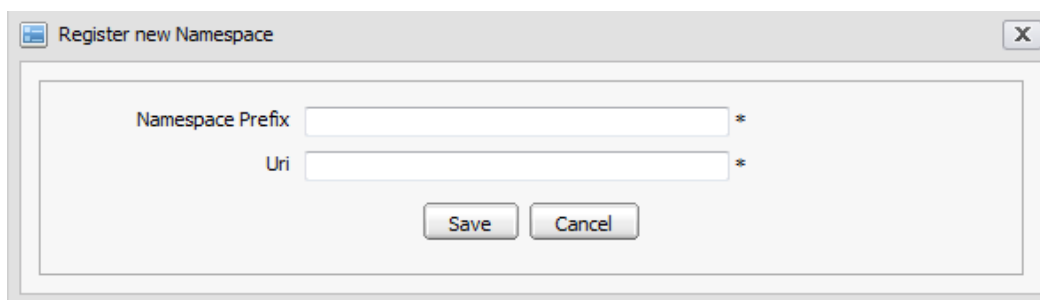
| Prefix | Namespace Uri                                       |
|--------|---|
| app    | http://www.gatein.org/jcr/application-registry/1.0/ |
| dc     | http://purl.org/dc/elements/1.1/                    |
| exo    | http://www.exoplatform.com/jcr/exo/1.0              |
| fn     | http://www.w3.org/2005/xpath-functions              |
| fn_old | http://www.w3.org/2004/10/xpath-functions           |
| Fwd    | http://www.exoplatform.com/jcr/Fwd/1.1/             |
| jcr    | http://www.jcp.org/jcr/1.0                          |
| kfx    | http://www.exoplatform.com/jcr/kfx/1.1/             |
| lgn    | http://www.gatein.org/jcr/autologin/1.0/            |

Total pages: 3

Register

Illustration 168: Namespace Registry

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



Register new Namespace

Namespace Prefix \*

Uri \*

Save Cancel

Illustration 169: 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 the **Save** button to finish registering a new name space.





The namespace must be unique.

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

## 4.4.2 Manage Node Type

The function is used to control all node types in **eXo WCM**.

Go to **Sites Administration** → **Types of Content** → **Manage NodeType**.



### Manage Node Type

Node type name

| Icon | Node type            | Mixin type | Orderable child nodes | Description | Action |
|------|----------------------|------------|-----------------------|-------------|--------|
|      | app:content          | ✗ false    | ✗ false               | nothing     |        |
|      | app:contentcategory  | ✗ false    | ✓ true                | nothing     |        |
|      | app:contentregistry  | ✗ false    | ✓ true                | nothing     |        |
|      | app:gadgetdata       | ✗ false    | ✗ false               | nothing     |        |
|      | app:gadgetdefinition | ✗ false    | ✗ false               | nothing     |        |
|      | app:gadgetregistry   | ✗ false    | ✗ false               | nothing     |        |
|      | app:localgadgetdata  | ✗ false    | ✗ false               | nothing     |        |
|      | app:remotegadgetda   | ✗ false    | ✗ false               | nothing     |        |
|      | dc:elementSet        | ✓ true     | ✗ false               | nothing     |        |
|      | exo:accessControllab | ✓ true     | ✗ false               | nothing     |        |

Total pages: 18

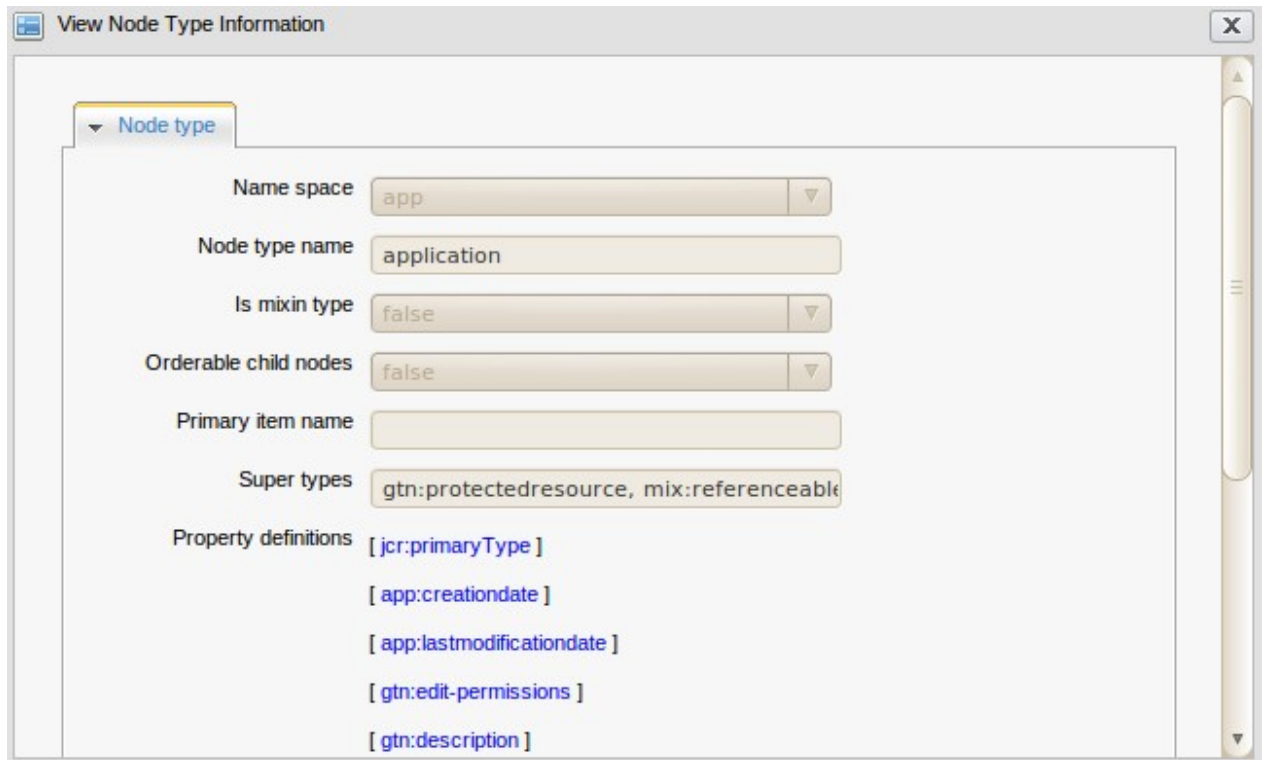
Illustration 170: The Manage Node Type form

### 4.4.2.1 View node types

Do as follows:

**Step 1:** Click the icon that corresponds to a node type you want to view.

The **View Node Type Information** form will appear:



The screenshot shows a web browser window titled "View Node Type Information". Inside the window, there is a tab labeled "Node type". Below the tab, the form contains the following fields and values:

- Name space: app
- Node type name: application
- Is mixin type: false
- Orderable child nodes: false
- Primary item name: (empty field)
- Super types: gtn:protectedresource, mix:referenceable
- Property definitions: [ jcr:primaryType ], [ app:creationdate ], [ app:lastmodificationdate ], [ gtn:edit-permissions ], [ gtn:description ]

Illustration 171: The View Node Type Information form

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

#### 4.4.2.2 Add node types

Do as follows:

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

Illustration 172: 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.

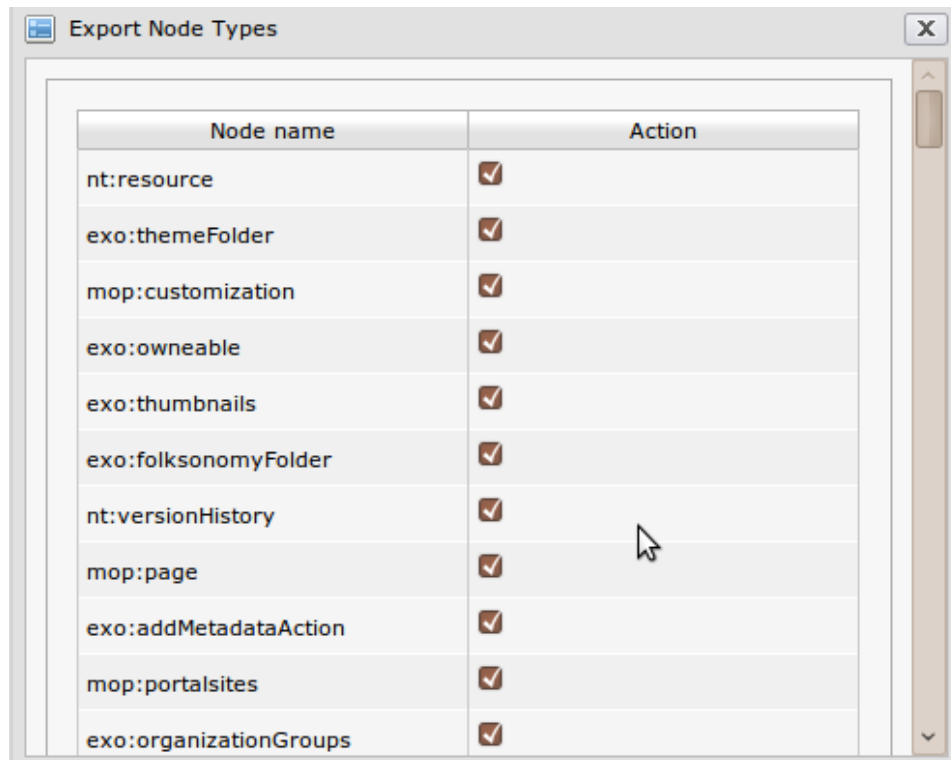
**Step 9:** Child node definitions: list all definition names of **Child node** tab.

**Step 10:** Click the **Save** button to accept adding a new node type or click the **Save draft** button to save this node type as a draft or click the **Cancel** button to quit.

#### 4.4.2.3 Export node types

Do as follows:

**Step 1 :** Click the **Export** button to open the **Export Node Types** form:



| Node name              | Action                              |
|------------------------|-------------------------------------|
| nt:resource            | <input checked="" type="checkbox"/> |
| exo:themeFolder        | <input checked="" type="checkbox"/> |
| mop:customization      | <input checked="" type="checkbox"/> |
| exo:owneable           | <input checked="" type="checkbox"/> |
| exo:thumbnails         | <input checked="" type="checkbox"/> |
| exo:folksonomyFolder   | <input checked="" type="checkbox"/> |
| nt:versionHistory      | <input checked="" type="checkbox"/> |
| mop:page               | <input checked="" type="checkbox"/> |
| exo:addMetadataAction  | <input checked="" type="checkbox"/> |
| mop:portalsites        | <input checked="" type="checkbox"/> |
| exo:organizationGroups | <input checked="" type="checkbox"/> |

Illustration 173: 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.



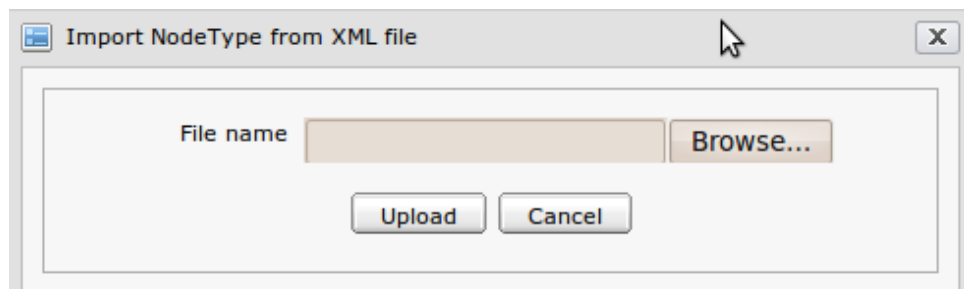
*You must select at least 1 node type to be exported.*

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

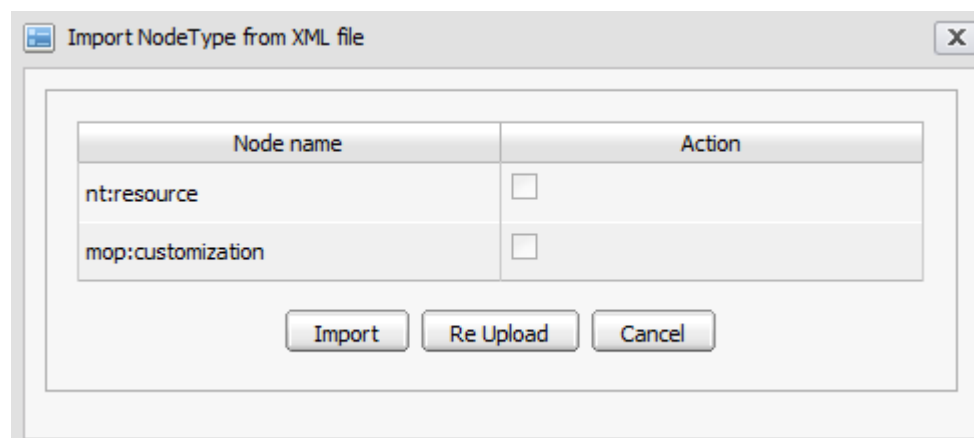
#### 4.4.2.4 Import node types

Do as follows:

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




**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.

## 4.5 Advanced Configuration

### 4.5.1 Manage Queries

The function is used to manage queries. It allows adding, editing and deleting queries.

Go to **Sites Administration** → **Advanced Configuration** → **Manage Queries**



#### Manage Queries

| Name                   | Type  | Statement  | Permissions       | Actions |
|------------------------|-------|--|-------------------|---------|
| All Articles           | xpath | //element(*,exo:article)<br>order by<br>@exo:dateCreated<br>descending   | *:/platform/users |         |
| Created Documents      | xpath | //*[(@jcr:primaryType =<br>'exo:article' or<br>@jcr:primaryType =<br>'nt:file') and<br>@exo:owner='{\${UserId}}\$'<br>order by<br>@exo:dateCreated<br>descending | *:/platform/users |         |
| CreatedDocumentDayBefo | xpath | //element(*,exo:article)<br>[@exo:dateCreated <<br>xs:dateTime('\${Date}\$')]<br>order by<br>@exo:dateCreated<br>descending                                      | *:/platform/users |         |

Add Query

Illustration 174: Manage Queries

#### 4.5.1.1 Add a new query

Do as follows:

**Step 1:** Show the **Add Query** form by clicking the **Add Query** button in the **Manage Queries** form.

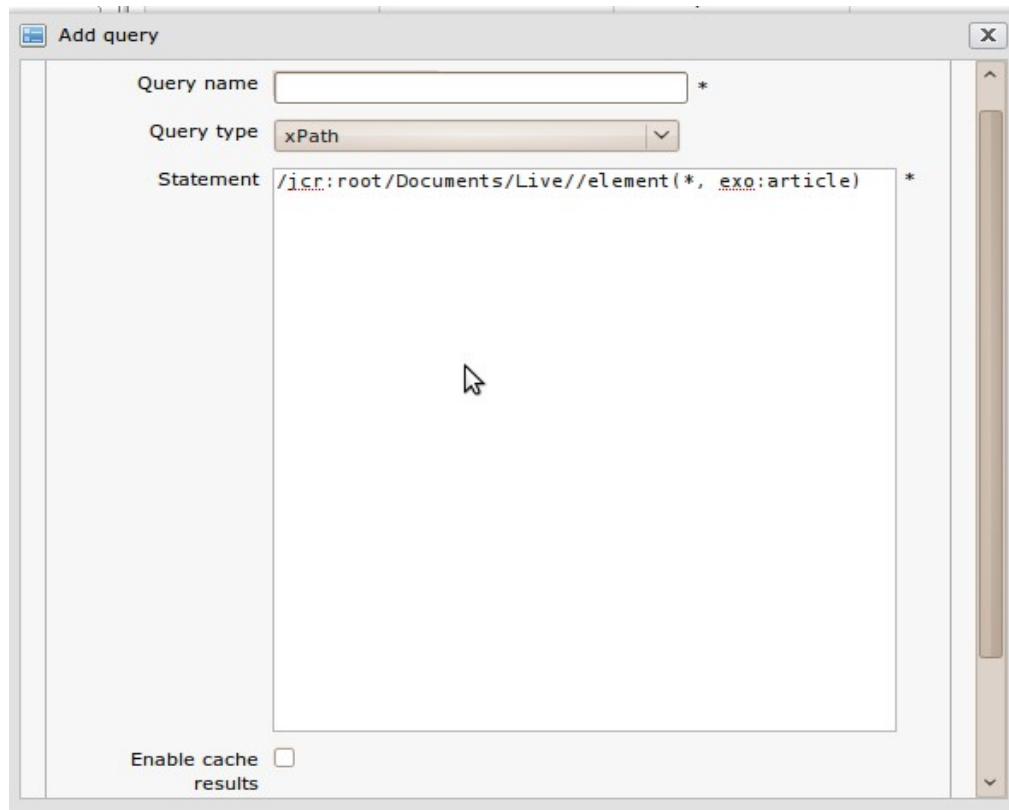


Illustration 175: The Add query form

**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.

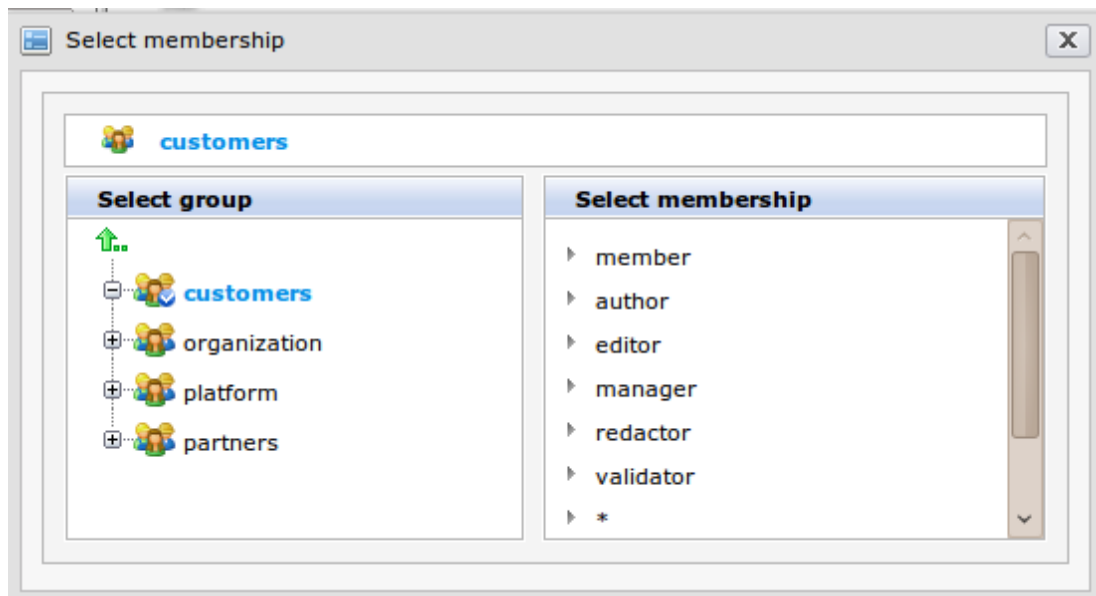
**Step 4:** Enter the statement for query. The name of node type must be unique.

**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. Execute query Test→ the result will

show only document File1. After that, create a nt:file document named File2 and execute query Test→, the result will list only document File2. After 45 minutes, the cache will be removed. Execute query Test→ the result will list document File1 and File2.

**Step 6:** Select permissions for a group that can use this query by clicking the  icon:



**Step 7:** Click the Save button to finish adding a new query.

#### 4.5.1.2 Edit a query

Do as follows:


**Step 1:** Click the  icon corresponding to the query you want to edit. The **Edit query** form will appear:





Illustration 176: The Edit query form

**Step 2:** Edit the properties of the selected query.


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



- You can not edit the query name.
- You can change the query name.
- You can edit the statement.
- You can check/uncheck in 'Enable cache results'.
- You can change permissions.

#### 4.5.1.3 Delete a query

Do as follows:

**Step 1:** Click the  icon corresponding to the query you want to delete. A confirmation message will appear.

**Step 2:** Click the **OK** button to accept deleting this query or click the **Cancel** button to discard this action.

## 4.5.2 Manage Scripts

The function allows users to manage all script codes in the **eXo WCM** and Browser Content system.

Go to **Sites Administration** → **Advanced Configuration** → **Manage Scripts**.

**Manage Scripts**

ECM Scripts | BC Scripts

Select category: **action**

| Name                          | Path                                  | Base Version | Actions |
|-------------------------------|---------------------------------------|--------------|---------|
| AddMetadataScript.groovy      | ...ction/AddMetadataScript.gr         |              |         |
| AddTaxonomyActionScript.grc   | ...AddTaxonomyActionScript.i          |              |         |
| AutoVersioningScript.groovy   | ...on/AutoVersioningScript.grc        |              |         |
| EnableVersioningScript.groovy | .../EnableVersioningScript.gro        |              |         |
| GetMailScript.groovy          | ...er/action<br>/GetMailScript.groovy |              |         |
| ProcessRecordsScript.groovy   | ...on/ProcessRecordsScript.gr         |              |         |
| PublishingRequestScript.groov | ...PublishingRequestScript.grc        |              |         |
| RSSScript.groovy              | ...plorer/action<br>/RSSScript.groovy |              |         |
| SendMailScript.groovy         | ...r/action<br>/SendMailScript.groovy |              |         |
| TransformBinaryChildrenToTe   | ...aryChildrenToTextScript.gr         |              |         |

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Add

Illustration 177: 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:

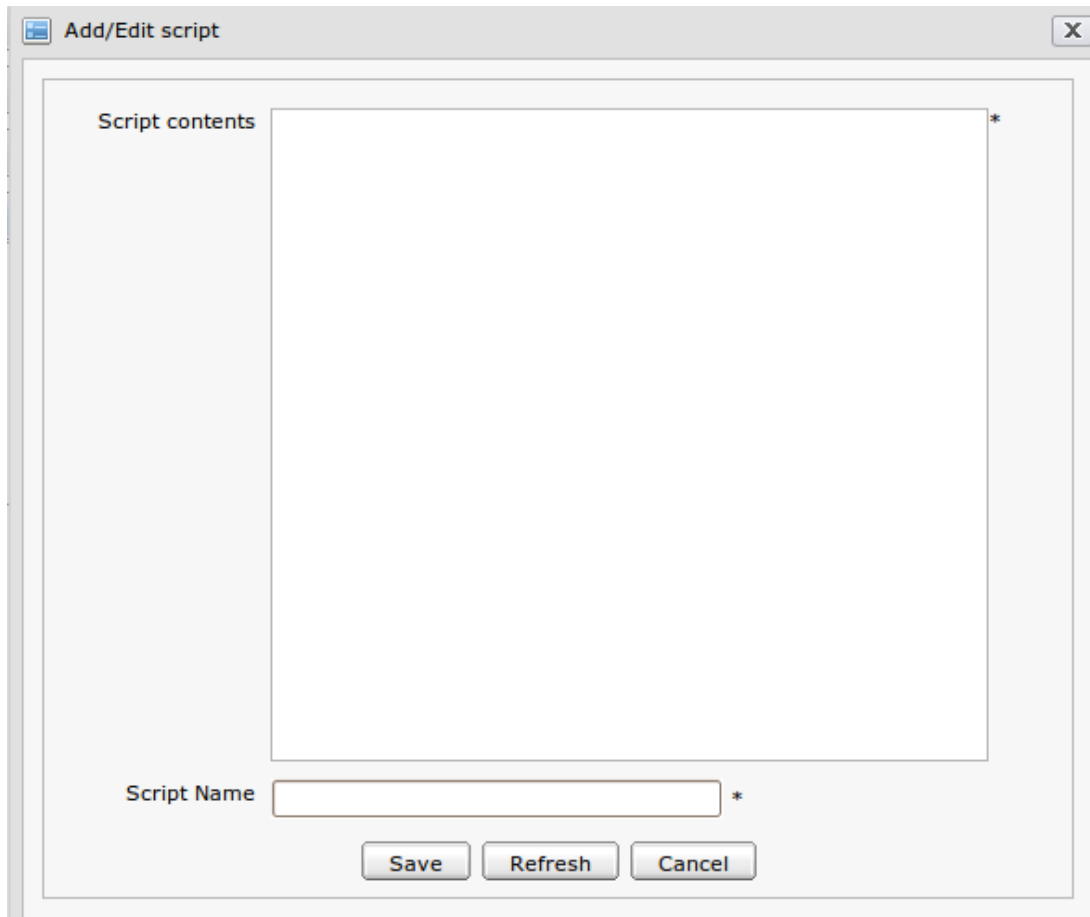


Illustration 178: The Add/Edit script form

(\*):required


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

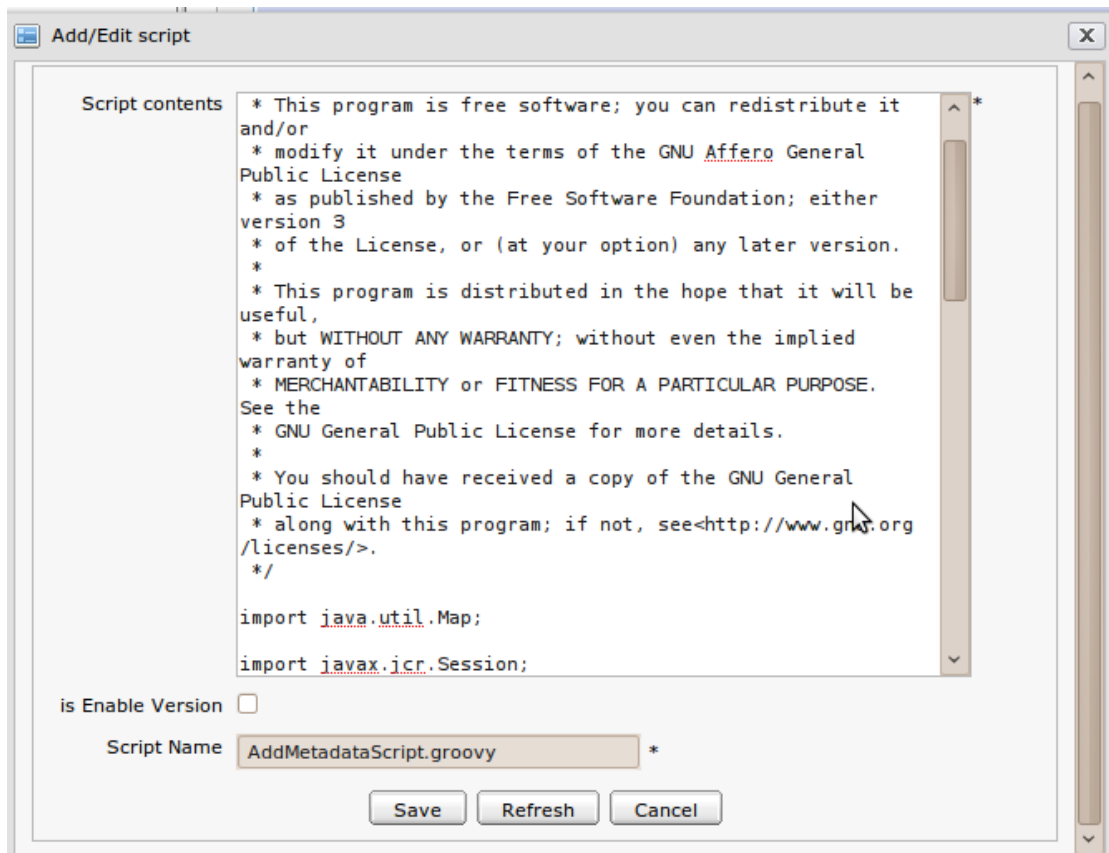
**Step 4:** Enter a script name for the **Script Name** field.

- The script name must be unique.
- The name must not contain special characters such as !, @, #, \$, %, &, \*, (, ).

**Step 5:** Click the **Save** button to accept adding 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.

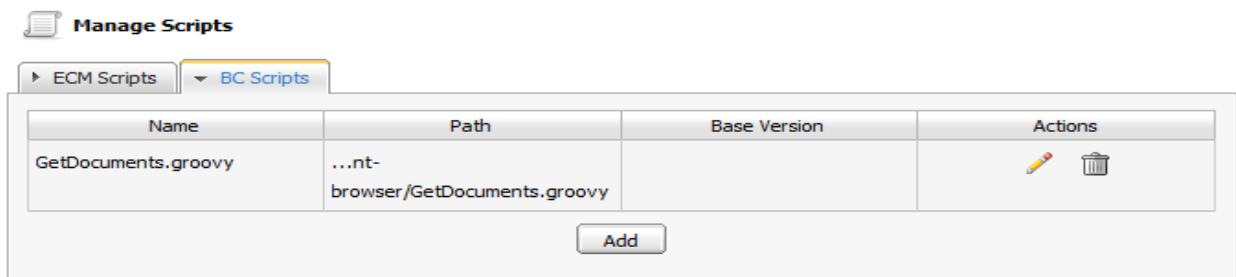
If you tick 'is Enable Version' checkbox, this script will automatically increase to 1 version after you click the Save button. It is displayed at the 'Base version' column in the **ECM Scripts** tab.

- ✓ To delete an ECM script, do as follows:



**Step 1:** In the **ECM Scripts** tab, click the  icon on script that you want to delete. A confirmation message will appear.

**Step 2:** Click the **OK** button to accept deleting this action or click **Cancel** button to discard this action.

### The BC Scripts tab:



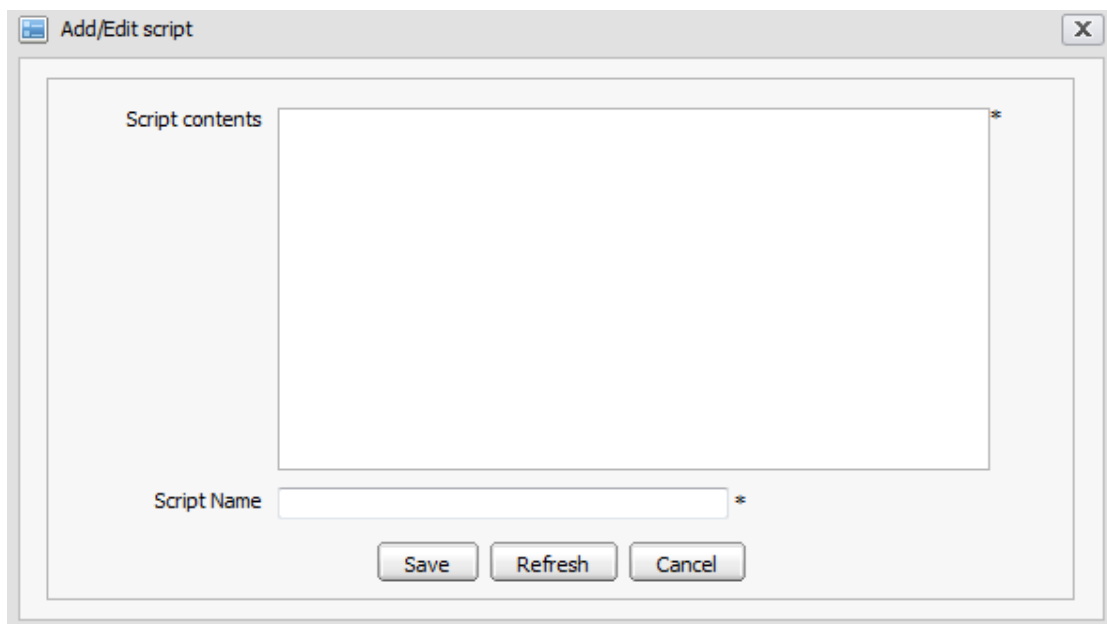
The screenshot shows the 'Manage Scripts' window with the 'BC Scripts' tab selected. It contains a table with columns: Name, Path, Base Version, and Actions. One script is listed: 'GetDocuments.groovy' with path '...nt-browser/GetDocuments.groovy'. An 'Add' button is at the bottom.

| 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:



The screenshot shows the 'Add/Edit script' dialog box. It has a 'Script contents' text area and a 'Script Name' text field, both marked with an asterisk to indicate they are required. At the bottom are 'Save', 'Refresh', and 'Cancel' buttons.

(\*): *required*

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

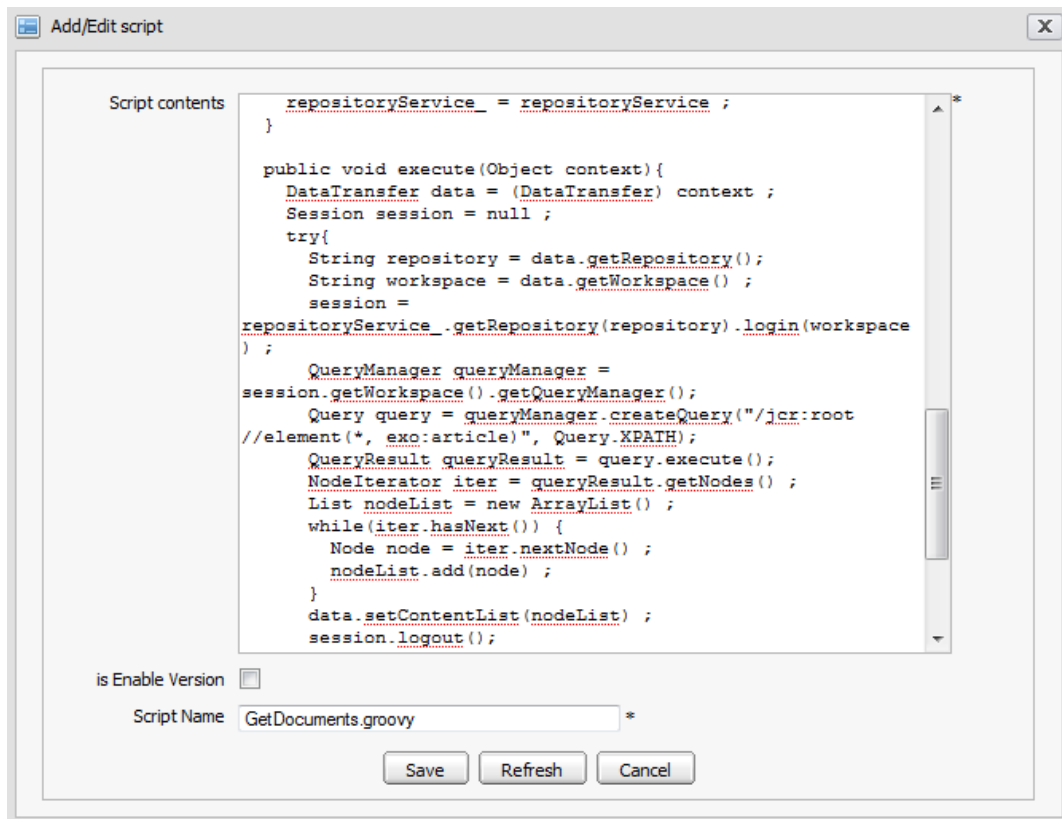
**Step 4:** Input a script name for the **Name** field.

**Step 5:** Click the **Save** button to finish adding a new script.

- ✓ To edit a BC script, do as follows:

**Step 1:** In the **BC Script** tab, click the  icon 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 the **Save** button 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 click the **Save** button. 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 the  icon on a script that you want to delete. A confirmation message appears.

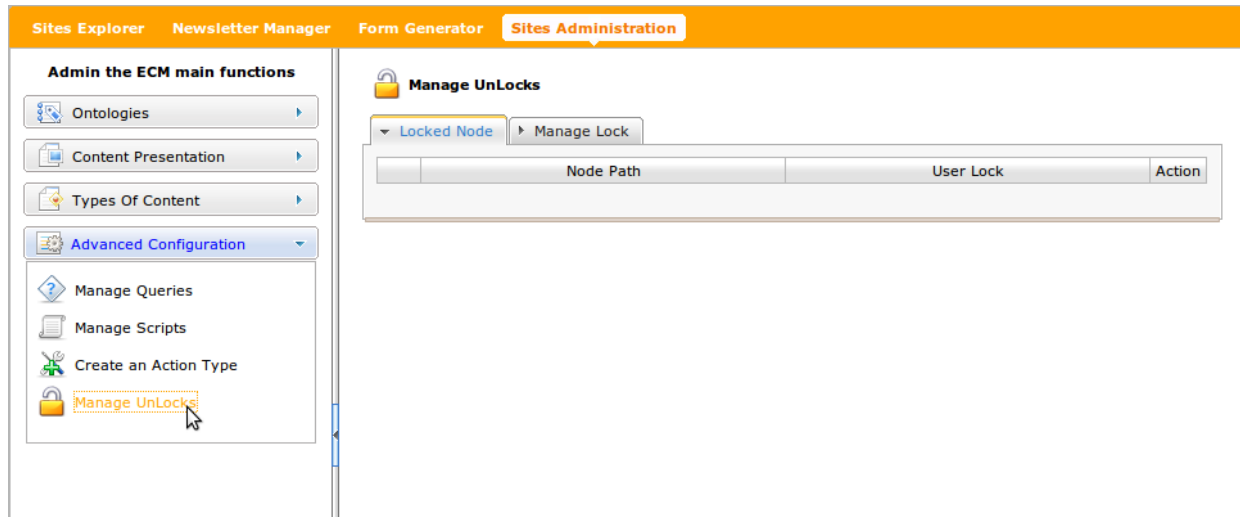
**Step 2:** Click the **OK** button to accept deleting this script or click the **Cancel** button to discard this action.


### 4.5.3 Manage Unlocks

All locked nodes are listed and managed by administrators in the **WCM** Administration. There are two ways that help administrators unlock nodes: unlock nodes in the right-click menu in Site Explorer or unlock nodes in the **WCM** Administration.


**Step 1:** Go to **Sites Administration** on the navigation bar.

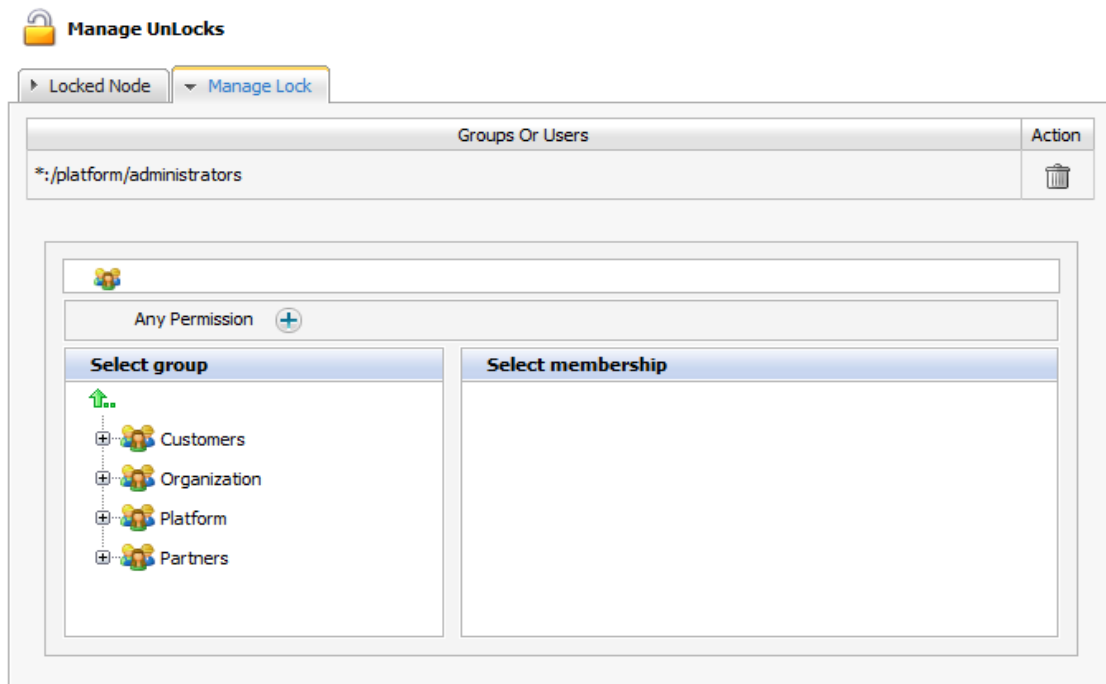
**Step 2:** Select **Advanced Configuration** → **Manage Unlocks** on the **Admin the WCM main functions** panel on the left, the locked nodes will be listed on the right panel.



**Step 3:** In the **Locked Node** tab on the right panel, administrators can unlock nodes by clicking on the  icon 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




icon that corresponds to the group in order to remove them from the Unlock permission list except the group **\*:/platform/administrator** and **root**.

#### 4.5.4 Create an Action Type

The function allows managing all action nodes in the **WCM** system.

- **Step 1:** Go to the **WCM Administration** on the navigation bar.
- **Step 2:** Select **Advanced Configuration** → **Create an Action Type**.



 **Create an Action Type**

| Name                    | Extends Action Type                       |
|-------------------------|---|
| exo:action              | [nt:base]                                 |
| exo:addMetadataAction   | [exo:action] [exo:scriptAction] [nt:base] |
| exo:autoVersioning      | [exo:action] [exo:scriptAction] [nt:base] |
| exo:createRSSFeedAction | [exo:action] [exo:scriptAction] [nt:base] |
| exo:enableVersioning    | [exo:action] [exo:scriptAction] [nt:base] |
| exo:folksonomyAction    | [exo:action] [exo:scriptAction] [nt:base] |
| exo:getMailAction       | [exo:action] [exo:scriptAction] [nt:base] |
| exo:processRecordAction | [exo:action] [exo:scriptAction] [nt:base] |
| exo:sendMailAction      | [exo:action] [exo:scriptAction] [nt:base] |
| exo:taxonomyAction      | [exo:action] [exo:scriptAction] [nt:base] |

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**Add**

Illustration 179: 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 180: The Action Type Form form

**Step 4:** Select the action type.

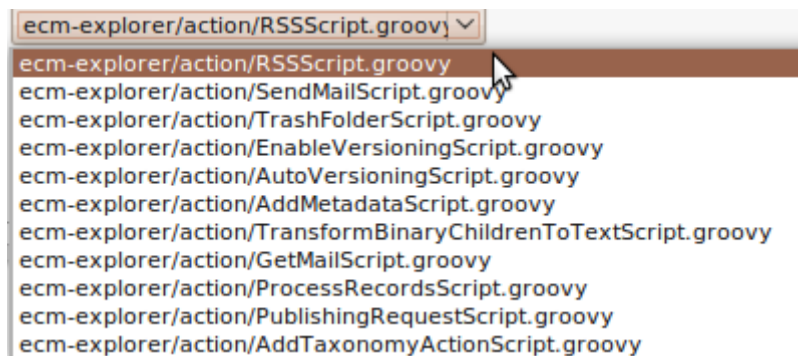
**Step 5:** Input a name for the action.





- 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 the  icon . Click the  icon to delete a value.

**Step 9:** Click the **Save** button to accept adding a new action type.

## 5 Next Steps

This user manual has provided a thorough explanation of features and terminologies within eXo Content. Now that you know how to create, manage and publish web content and administer a website based on eXo Content, you may have more questions or want to get involved in the eXo community. The following links can connect you with resources to learn more and contribute to the open source development process.

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