GateIn User Guide

the GateIn community , JBoss by Red Hat , and eXo Platform

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Preface

1.1. Overview

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

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

GateIn 3.2 is the perfect merge between Red Hat and eXo Platform in creating a new generation of Open Source portal that is robust and intuitive. With GateIn, both normal users and enterprises can enjoy many personalization and collaboration applications wherever and whenever. Advantages generated in GateIn, such as the interactive user interface, customizable look and feel, flexible internationalization and localization, facilitate the birth of many useful applications with a variety of rich utilities in the world market.

1.2. Purpose of the guide

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

1.3. References and Related Sources

Information

- eXo Home Page
- eXo Wiki

Support

- Forums
- FAQs

Get started

2.1. Glossary

2.1.1. Portal

An enterprise portal is a Web application that provides means to aggregate and personalize information via application-specific portlets.

Users and administrators are able to integrate information, people and processes across organizational boundaries via a web-based user interface.

The framework enables aggregation of enterprise content and business applications with flexible management and personalization options.

2.1.2. Portlet

A portlet is a small, self-contained web application. Portlets are managed and displayed within a Portal. Typically, a *portal* page is displayed as a collection of non-overlapping *portlet* windows, with each portlet window displaying a different portlet. Hence a portlet (or collection of portlets) resembles a web-based application hosted in a portal.

Portlets can be configured to generated differing content and GateIn 3.2 has a number of default portlets that can be used in any portal built in the application.

2.1.3. Toolbar

The Toolbar spans the top of the portal application and provides links to user and administrative actions.

This screenshot displays three Navigations referred to in Section 2.1.4, “Navigation” as well as the main Menu button (on the far left of the toolbar) and the name of the current user (on the far right).

In this example the current user is the site administrator, hence the extra "Site Editor" menu.

2.1.4. Navigation

Portal navigations are menus that contain hyperlinks to other parts of a Portal. They can help users to visualize the structure of a site. The default navigation menus in GateIn 3.2 are located in the Toolbar (Section 2.1.3, “Toolbar”).

There are three navigation types.

Site

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

This functionality allows different sites to administer some Portal aspects (such as portlets) individually while maintaining other content standardized with the parent Portal.

Group

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

- If a user account in in effect, this navigation holds personal links set up by that user.
- When using a management account, this navigation contains links to pages for registered users as well as administrative tasks and personal links.
- In an administrator account the navigation adds further management abilities such as Internationalization and community management.

Dashboard

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

When logged in as an Administrator, a fourth navigation appears in the Toolbar:

Site/Group Editor

This navigation appears as either **Site Editor** or **Group Editor** depending on the administrator's location within the portal.

When in areas of the portal displaying content, the navigation shows as **Site Editor** and in areas of the portal pertaining to users, the navigation shows as **Group Editor**.

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

2.1.5. Gadgets

A gadget is a customizable mini web application that portal users may add to their web pages.

For more information about the gadgets shipped by default with GateIn 3.2, please check out Section 3.3, “Dashboard portlet” [23]

2.1.6. Modes

By default GateIn 3.2 offers two access **modes**:

Public

This mode is for guest users who are not registered with the Portal. It does not require a log in and restricts the visitor to the public pages in the portal. Visitors can register an account to gain access to the restricted pages. After being registered, they can use the Private mode but must still contact the Portal administrator to get more rights or a group manager to become a member and gain access a group.

Private

This mode is for registered users only. Users set a username and password during registration which they can then use to sign in. This mode offers users more site privileges. Registered users can manage private resources (creating, editing or deleting private pages), "borrow" pages from other users by creating hyperlinks and change the language for individual needs.

2.1.7. Permissions

Permission settings control what users can and cannot do within the portal and are set by portal administrators.

Permission **types** dictate what a user can do within the portal. Two permission types are available as follows:

Access

This permission type allows users to utilize portal content, that is; sign in, rearrange portlets, etc. This permission can be set for multiple member groups.

Edit

This permission type allows users to change portal content. This includes actions such as changing page information, deleting pages etc. The *Edit* permission is set for only one group at a time.

Permission **levels** dictate *where* in the portal the user's permission type applies. There are three permission levels:

Portal

The portal permission level includes all pages within the portal. Therefore, a user with the **access** permission type can view (but not edit) all the pages within the portal. A user with **edit** permission at the portal level, can change any page in the portal.

Page

The page permission level restricts the user to particular pages. Users are only able to see and/or edit (depending on their permission **type**) pages they have been given access to.

Portlet

The portlet permission level allows users to create a page by dragging and dropping portlets into a page. Some portlets are only used for administrators while some are used for individuals thus administrators have to set the appropriate *Access* permission.

Permission **types** and **levels** can be used to effectively control who can do what within the portal. For more information on setting permissions refer to Section 4.6, “Manage permissions”

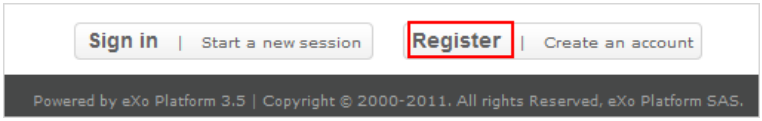
2.2. Accounts

2.2.1. Register new account

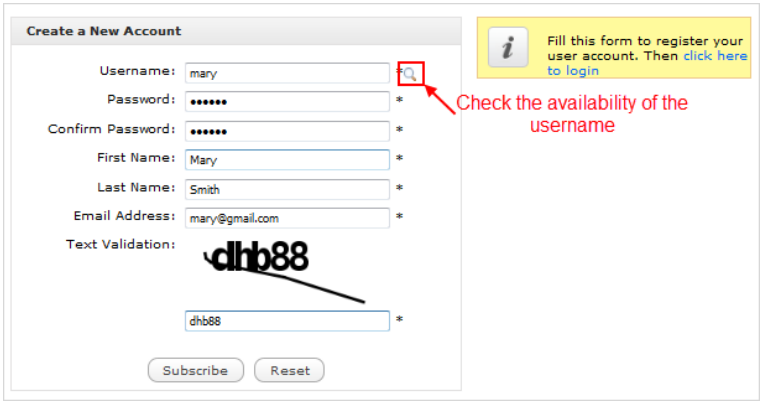
As a guest user, you can visit eXo Platform but are limited to a lot of content and applications. To access more content or perform some actions in various applications, you first need to register by yourself and contact the portal administrator to gain certain permissions.

1. Click **Register** on the top of the portal if you are in the ACME sample site.

If you are in the ACME Social intranet, click **Register** at the bottom of the portal.



The **Create a New Account** form appears as below:



Details:

Field	Description
Asterisk (*)	This mark next to each field indicates that it is required to input values in this field.
Username	The name used to log in. The username must be: • Lowercase (a - z), digit (0 - 9), underscore (_), and dot (.) characters, but consecutive underscore (_) and dot (.) are not allowed. • From 3 to 30 characters in length.

Field	Description
	• Lowercase for its first character. • Lowercase or digit for its last character.
Password	The authentication string which must be between 6 and 30 characters, including spaces.
Confirm Password	Retype the password above. Values in both **Password** and **Confirm Password** fields must be the same.
First Name	The user's first name which must start with a character. Its length must be between 1 and 45 characters.
Last Name	The user's last name which must start with a character. Its length must be between 1 and 45 characters.
Email Address	The user's email address that must be in the correct form, such as *username@abc.com*. There are two parts in the email address, called local part and domain (for example, local_part@domain): • Local part: Only lowercase (a - z), digit (0 - 9), underscore (_), dash (-) and dot (.) characters are allowed, and the first and last characters of this part must be lowercase or digit ones. • Domain: Only lowercase (a - z), digit (0 - 9), dash (-) and dot (.) characters are allowed, and the first and last characters of this part must be lowercase or digit ones. Note that the dot (.) character is required.
Text Validation	The text to verify your registration.

2. Fill values into fields.
3. Click **Subscribe** to accept your new account, or **Reset** to clear all your entered values. If your registration is not successful, there will be warning messages which indicate invalid fields.

- After adding a new account, you should contact your administrator to get appropriate permissions for your account.
- Click to check if your entered username already exists or not.

Note

Be sure you enter your email address carefully. Should you forget your username or password, you can recover it from this email address.

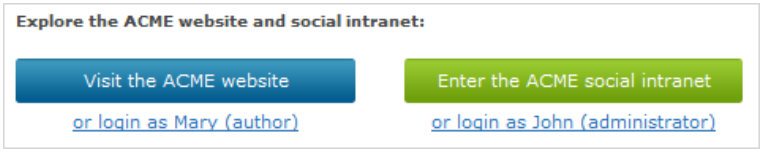
2.2.2. Sign in & Sign out

Sign in a portal

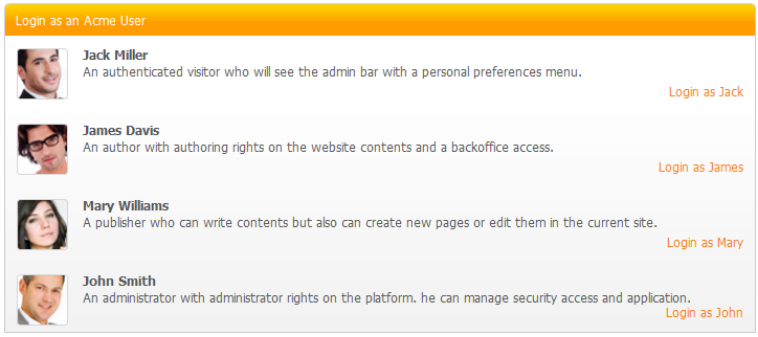
To enter the portal in the private mode, you just need to use your registered account. In eXo Platform 3.5, you can sign in the portal via two ways:

The first way

- Click directly one of the default user accounts at the lower of screen right in the welcome page or after entering your selected page.

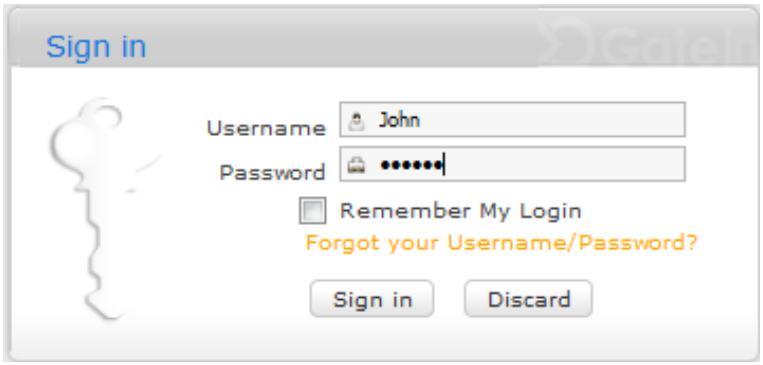


- Or, after entering your selected portal, for example ACME website, click one of the default users at the bottom of body as below.



The second way

1. Click the **Login** link to open the **Sign in** form.



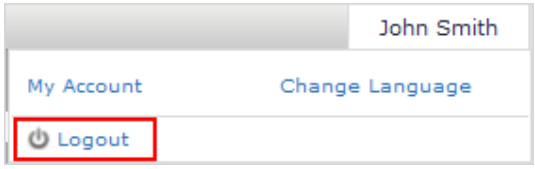
2. Input your registered **Username** and **Password** in the **Sign in** form.
3. Select the **Remember My Login** checkbox for the first time if you want to automatically return to this portal without signing in again. This feature enables you to be automatically authenticated to avoid doing an explicit authentication when you access the portal.
4. Click **Sign in** to submit the form, or **Discard** to quit.

Note

After selecting **Remember My Login**, if you do not sign out when you leave the portal, you will be automatically authenticated for your next visit.

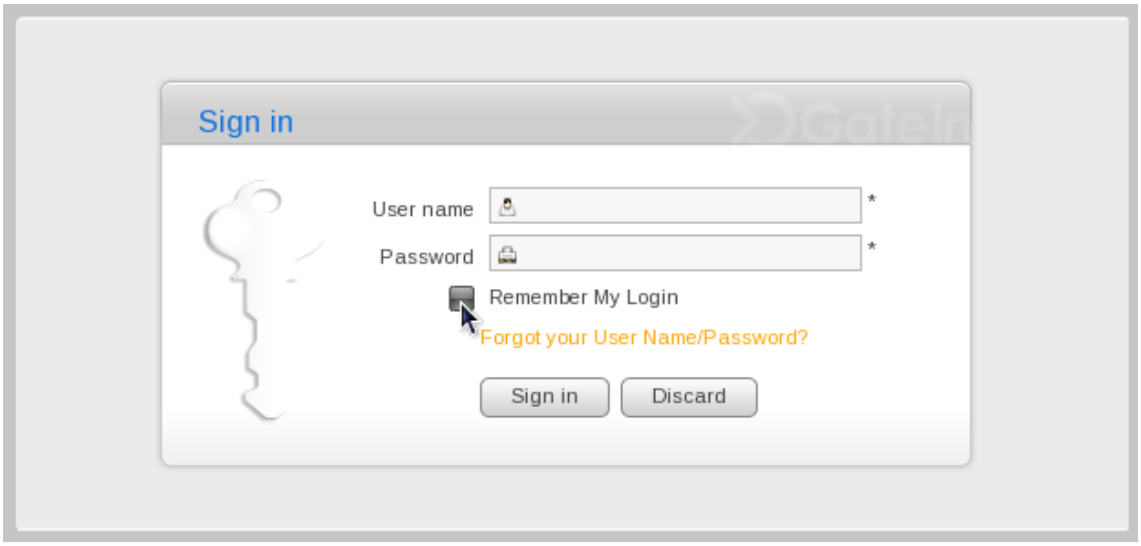
Sign out a portal

This feature ends your authenticated session and returns you to the anonymous portal. To sign out, simply hover your cursor over your display name at the top right corner of the site, then select **Logout** from the drop-down menu.



2.2.3. Remember User Account

Users who return to GateIn 3.2 regularly can be automatically authenticated to avoid performing an explicit authentication each time they access the portal.



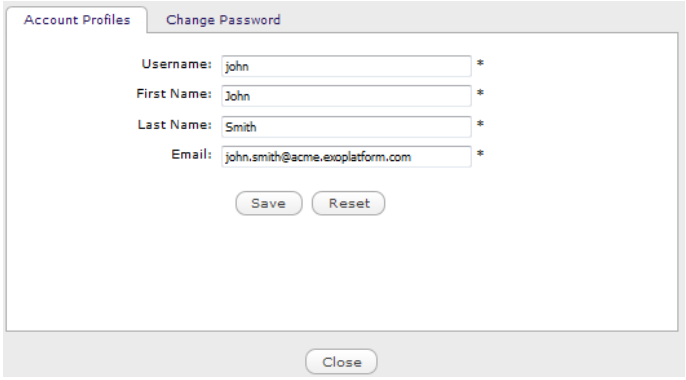
1. Input your registered user name and password.
2. Select the **Remember My Login** check box when logging in GateIn 3.2 at the first time.
3. Click the **Sign in** button to sign in the portal.

Do not sign out when you leave the portal and you will be automatically authenticated next time you visit it.

2.2.4. Change account settings

To change your account information, hover your cursor over the account name at the top right corner of the site and click **My Account** from the drop-down menu.

The **Account Profiles** form appears.



Change your profile information

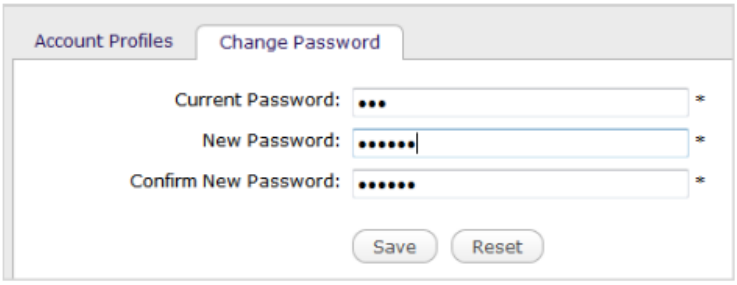
1. Select the **Account Profiles** tab.
2. Change your **First Name, Last Name, Email**. Your **Username** cannot be changed.

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

> **Note**
>
> The email address changed must be in the valid format. See details about the **Email Address** format here [5].

Change your password

1. Select the **Change Password** tab to go to the following form.



2. Input your current password to identify that you are the owner of this account.
3. Input your new password which must have at least 6 characters.
4. Re-enter your password in the **Confirm New Password** field.
5. Click **Save** to accept your changes.

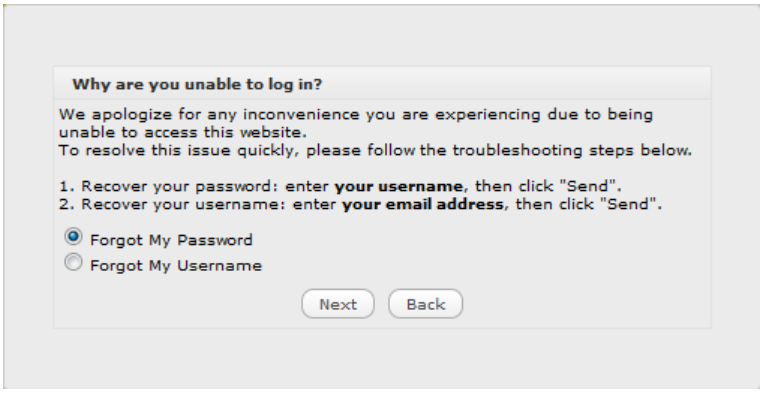
> **Note**
>
> If the default accounts' passwords have been changed, you can no longer sign in the portal by clicking the default accounts directly as stated in the first way. [6]

2.2.5. Retrieve account and password

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

1. Click the '**Forgot your Username/Password?**' link beneath the **Password** field when signing in.

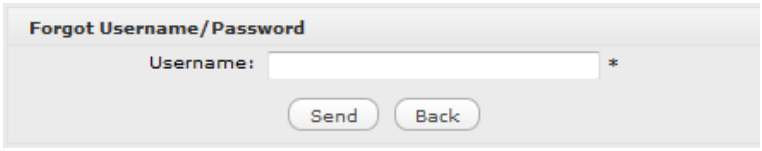
   There will be two options for you to select.



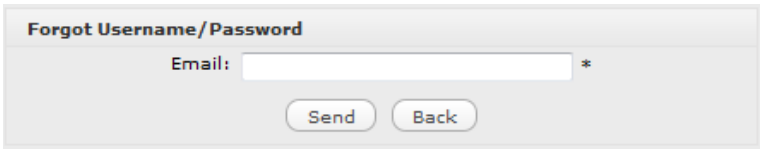
2. Select the appropriate option, then click **Next**.

   You will be prompted to provide identification information, depending on your choice.

   - If you select the **Forgot My Password** option, you will be prompted for your username.



- If you select the **Forgot My Username** option, you will be prompted for your email address.



3. Enter your **Username/Email** in the form above.
4. Click **Send** to submit your entered values.

- After you have submitted the form, an email will be sent to your email address with the requested information, either your username or password.
- If you forget your password, you will be sent a temporary password. Your original password will not be valid after this email is sent. You will be directed to a page to update your password for your next log-in.

2.3. Manage Language

2.3.1. Change Interface Language

GateIn 3.2 allows users to pick the language of the user interface.

The priority of the interface language setting follows this hierarchy:

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

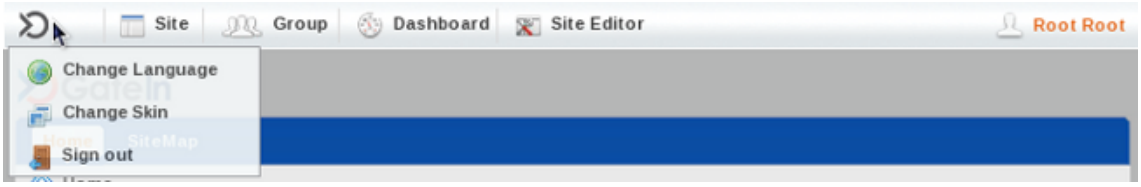
Note that users should pay attention to this order in order to change the language type appropriately.

You may switch the interface language in various places as follows:

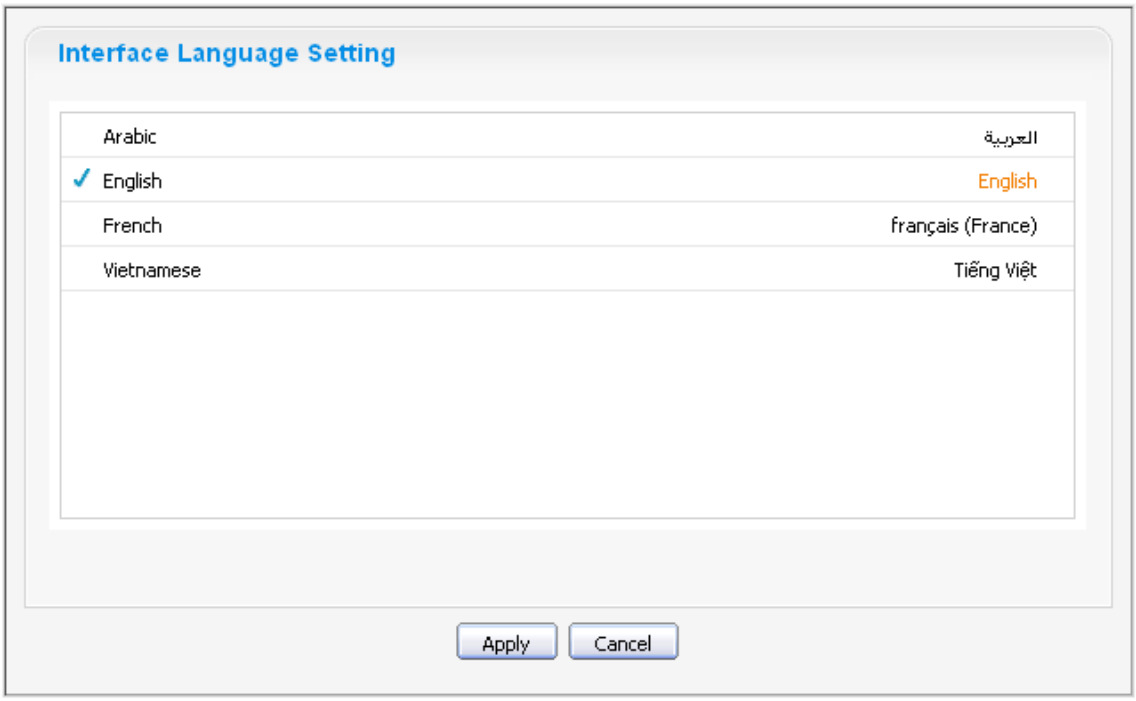
2.3.1.1. Language for the user

You may set the interface language for your account alone and not for the entire Portal as follows:

1. Open up the Start menu and click on **Change Language** :



2. The **Interface Language Setting** window lists all available languages installed in the Portal:



3. Click on the desired language. The associated native word is highlighted.
4. Click **Apply** to save your change. The site should refresh and display its attributes in the language you've just chosen.

2.3.1.2. Set language for a user

There are two modes to set the interface language for a specific user.

Public Mode

When accessing the portal in **Public Mode**, the interface language is dictated by the language setting of your web browser.

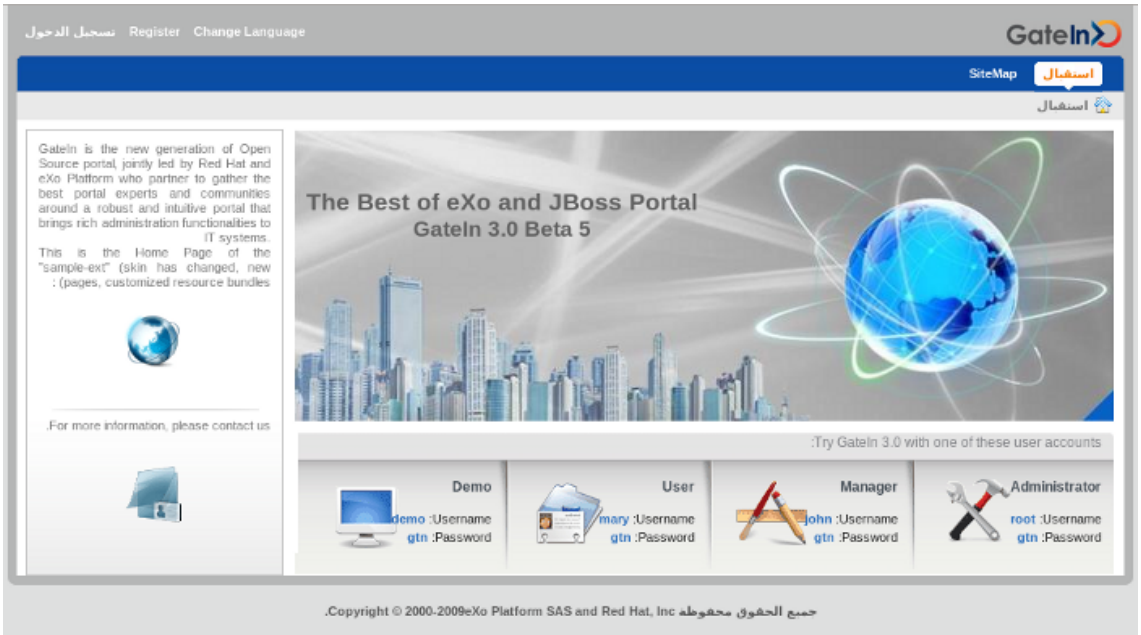
If you have set the language of your browser to one that GateIn 3.2 does not support, the displaying language will be the language set at the Portal level (see above).

Private Mode

The interface language in **Private Mode** is set when registering each user. See step four of the process to register a new account Section 2.2.1, “Register new account”.

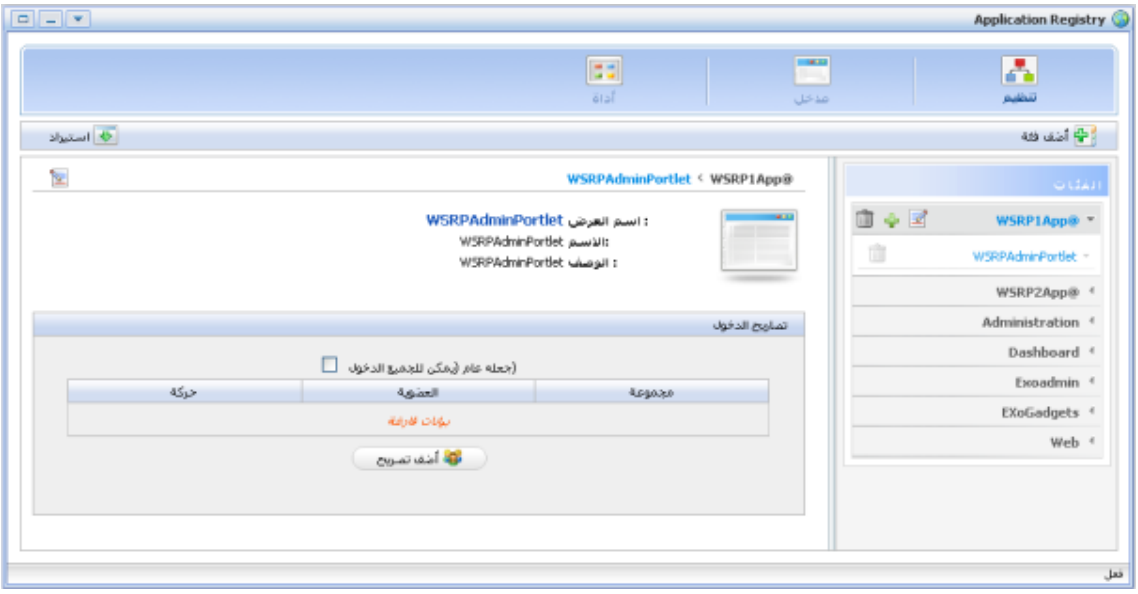
2.3.2. Right To Left Support

GateIn 3.2 supports Right to Left (RTL) languages.

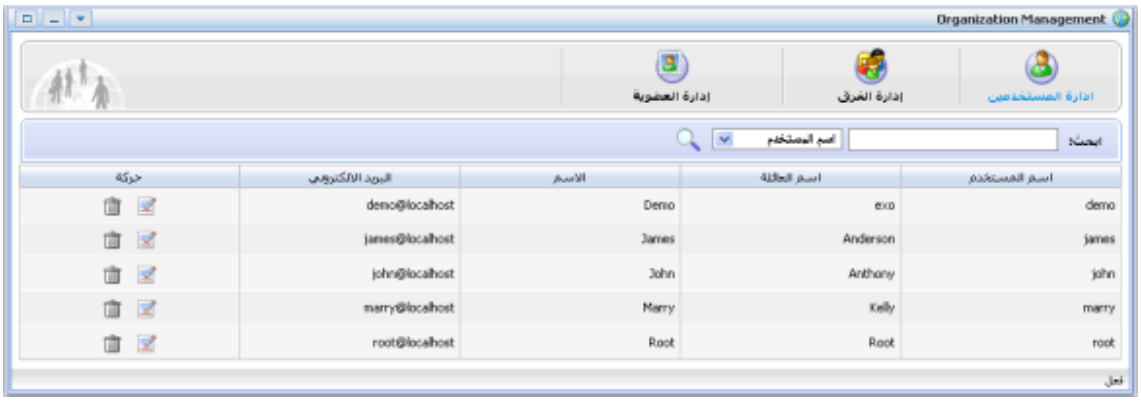


The Account Portlet.

The Application Registry Portlet.



The Organization Portlet:



2.3.3. Multi-Language Navigation Nodes

GateIn 3.2 supports a multi-language environment for your portal allowing you to internationalize any menu entry on the navigation.

As the navigation bar is composed of nodes, you have to modify the display names of the nodes to enable this. Instead of entering the display name of the node in a defined language (English, for example) you have to use a language-neutral 'resource key'.

This resource key is then used to define the label that is shown for that node on the navigation bar, the menu and the breadcrumb.

2.3.3.1. Key Format

The resource key format is: **#{key}**

The resource key can contain any text that you consider appropriate to satisfy your business needs. It should, however, be human-readable and must not contain spaces.

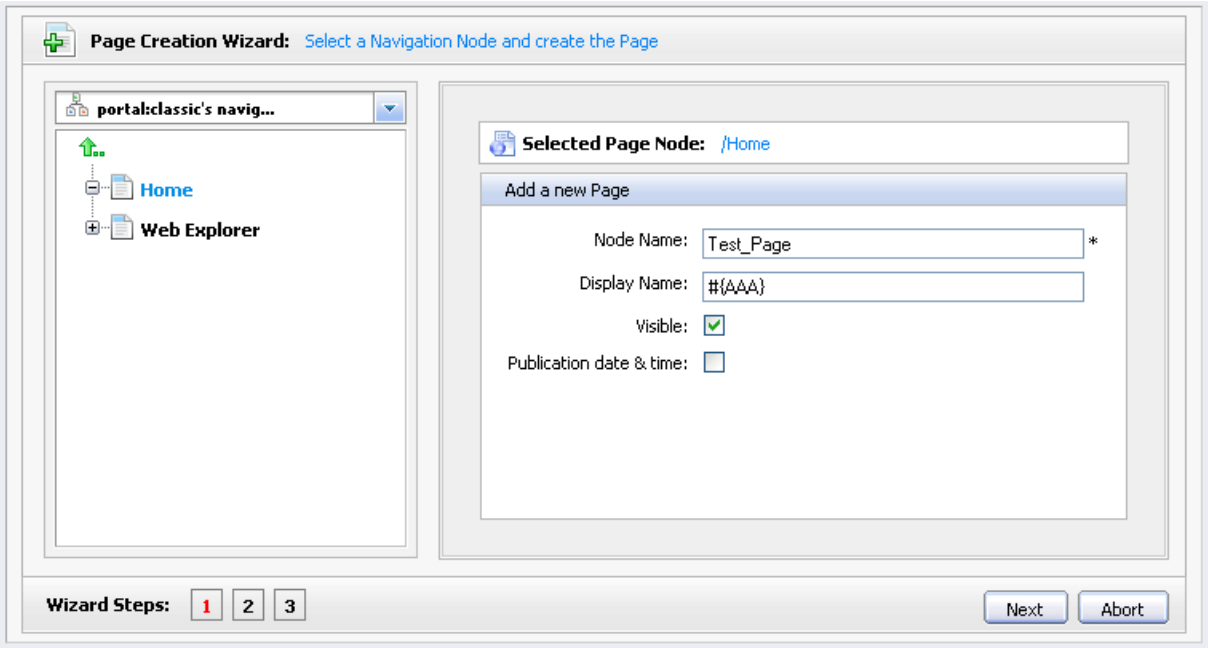
2.3.3.2. Creating Keys

There are two ways to create a key for a node:

1. Section 2.3.3.3, “Creating Keys using **Create Page Wizard**”
2. Section 2.3.3.4, “Creating/Editing Keys using **Navigation Management**”

2.3.3.3. Creating Keys using Create Page Wizard

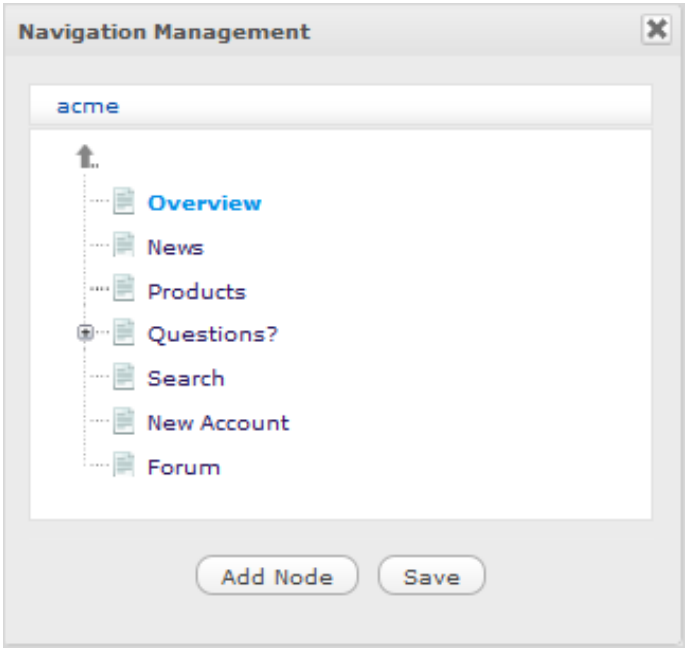
1. Open the **Site Editor** menu and pick **Add New Page**.
2. Enter a name for this new page
3. Enter a resource key in the **Display Name** field.



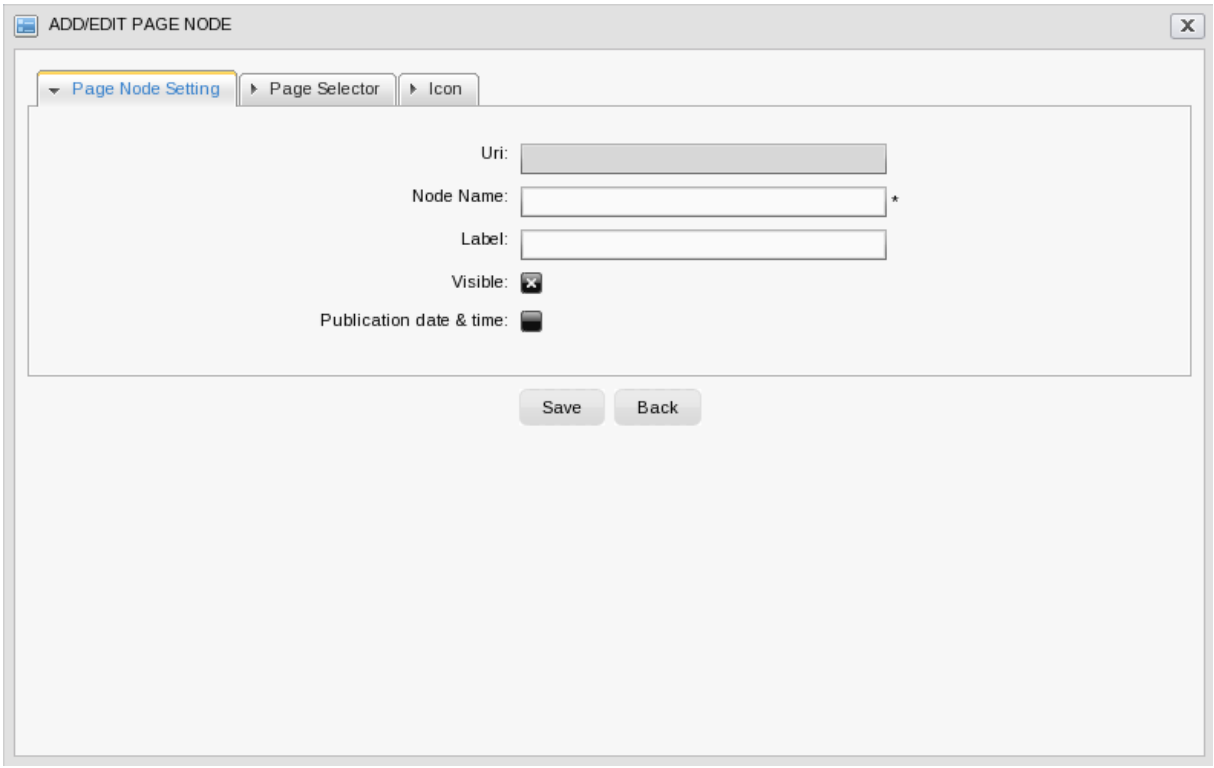
4. Click **Next**. On the next screen you may define a page layout out of existing templates.
5. Click **Next** to finalize the page creation with portlets for instance.

2.3.3.4. Creating/Editing Keys using Navigation Management

1. Click on **Site** in the Toolbar then **Edit Navigation**



2. Click on **Add Node**
3. The Create/Edit node dialog appears. Enter a resource key in the **Label** field



Reusing Keys

You can reuse the same resource key in several nodes.

2.3.3.5. Providing translation

To provide a translation for the resource key used as page name, resource bundles must be provided within the web archive.

Property files (or XML resource bundles) must be located in: **WEB-INF/classes/locale/navigation/portal/[portalName]_[2letterCode].properties**

Portlets

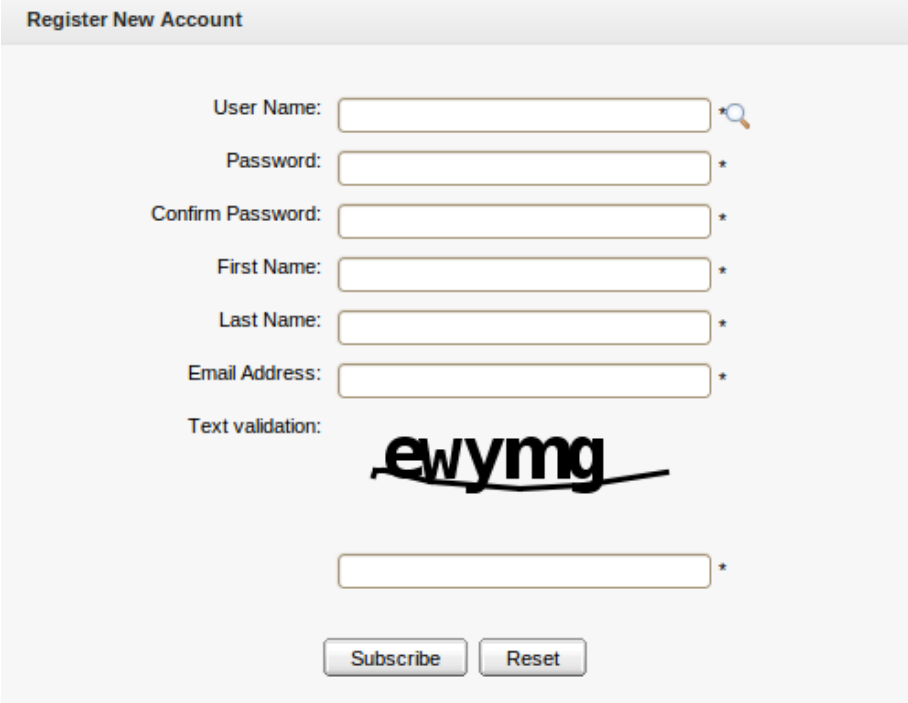
3.1. Functional Portlets

Portlets are pluggable user interface components that are managed and displayed within a portal. Functional Portlets support all functions of a Portal. They are built into the portal and are accessed via toolbar links as required when actioning portal tasks.

GateIn 3.2 provides the following portlets by default:

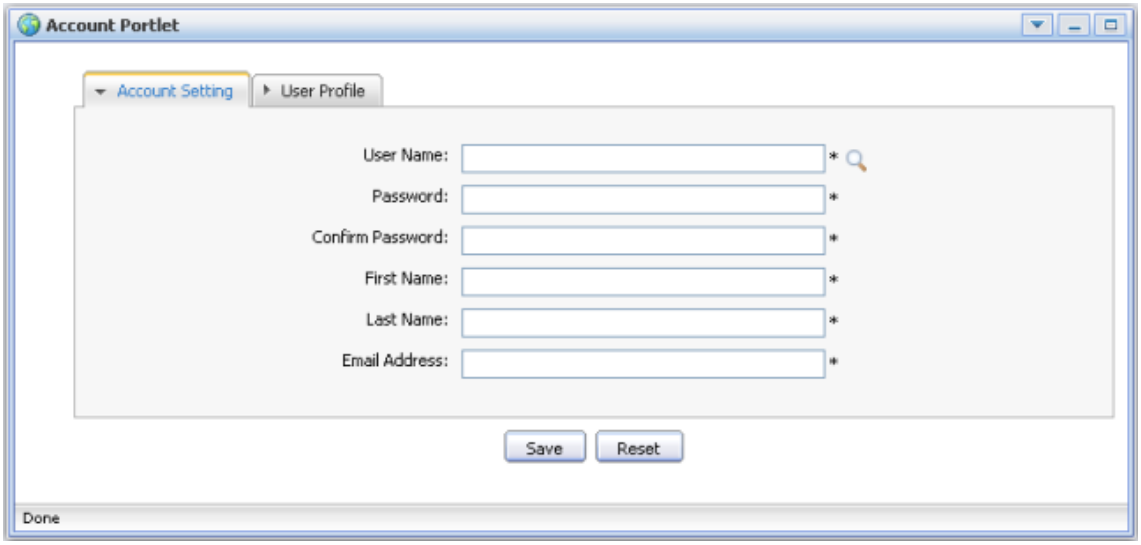
3.1.1. Register portlet

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



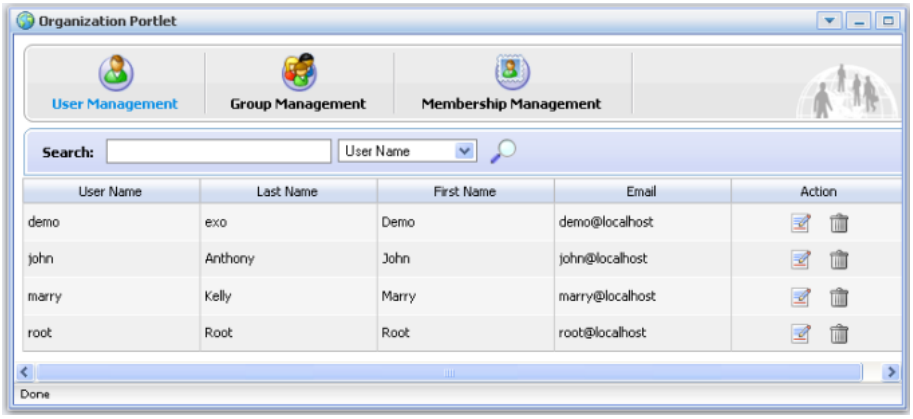
3.1.2. Account portlet

The Account portlet allows users to register a new account and choose a preferred language for displaying the Portal interface.



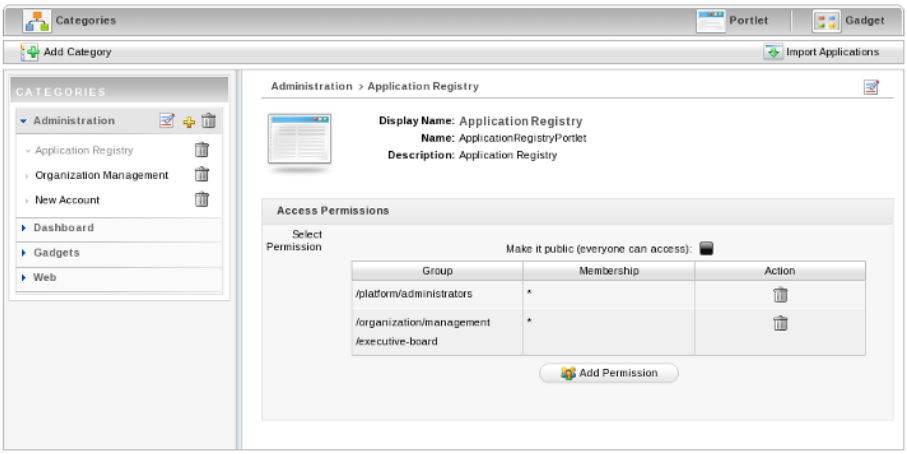
3.1.3. Organization portlet

The Organization portlet is used to manage user information, groups of users and groups memberships.



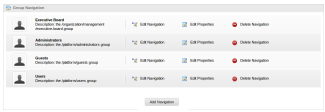
3.1.4. Application Registry portlet

The Application Registry portlet is used to manage different application categories. You can add, edit, set permissions and delete a category and its applications.



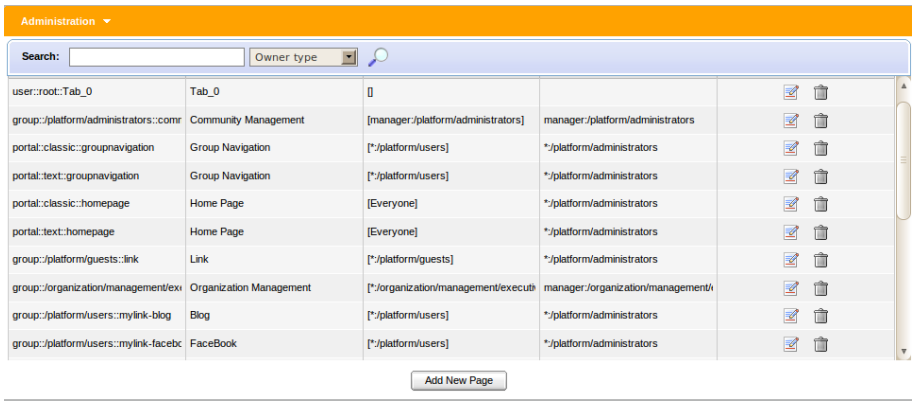
3.1.5. Group Navigation portlet

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



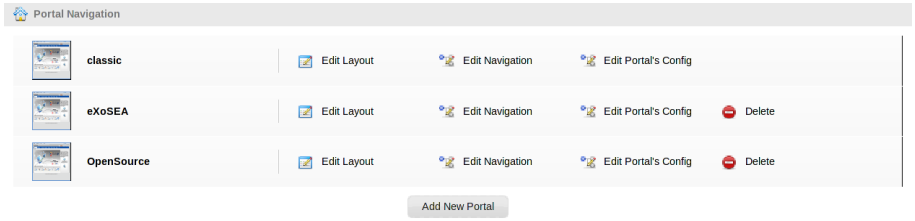
3.1.6. Page Management portlet

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



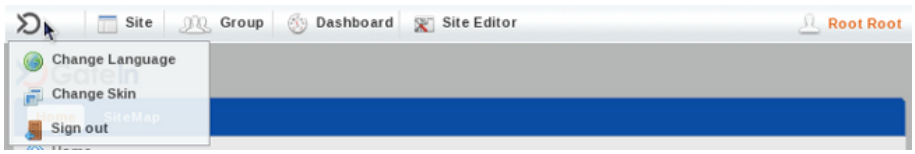
3.1.7. Portal Navigation portlet

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



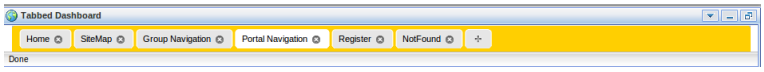
3.1.8. Star Toolbar portlet

The Star Toolbar portlet displays a list of actions: Change Language, Change Skin, Sign out.



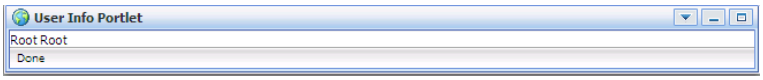
3.1.9. Tabbed Dashboard portlet

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



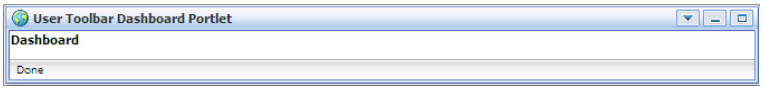
3.1.10. User Info portlet

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



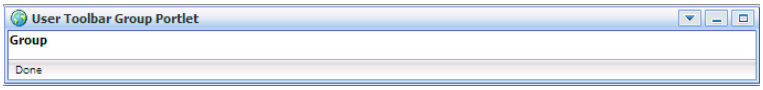
3.1.11. User Toolbar Dashboard portlet

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



3.1.12. User Toolbar Group portlet

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



3.2. Interface portlets

The Interface portlets are the front-end components of the Portal. They provide ways for users to interact with the portal. GateIn 3.2 provides the following Interface Portlets:

3.2.1. Banner portlet

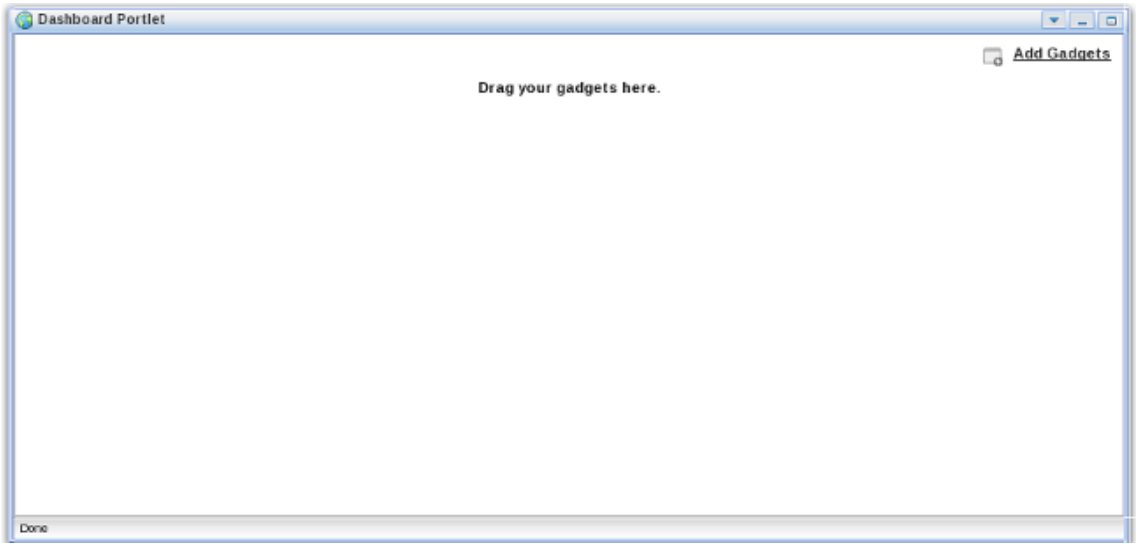
This portlet contains the organization's slogan, logo, and icons.

3.2.2. Breadcrumbs portlet

The portlet displays the navigation path of the selected page.

3.2.3. Dashboard portlet

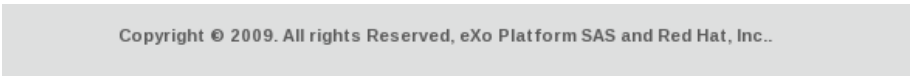
This portlet is used for hosting mini-applications known as gadgets. The dashboard uses a variety of graphical effects for displaying, opening, and using gadgets.



Refer to Section 3.3, “Dashboard portlet” or Chapter 5, *Categories, Portlets and Gadgets Administration* for more information.

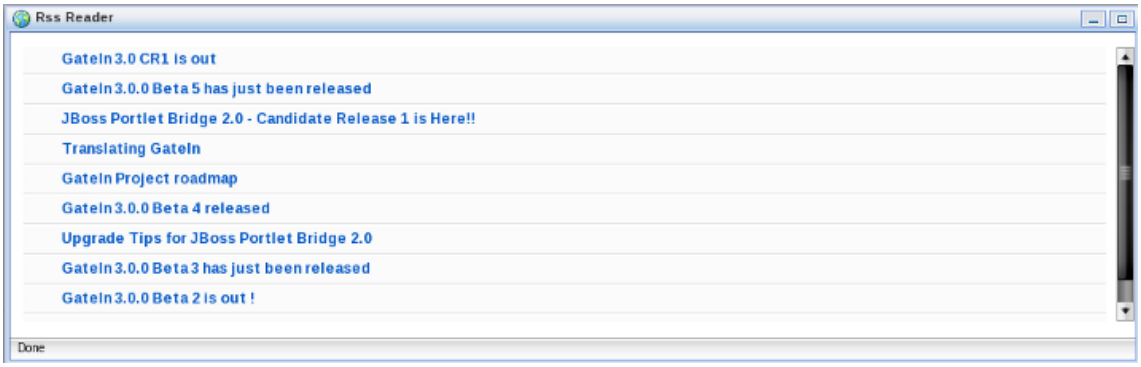
3.2.4. Footer portlet

This portlet provides the footer for a site. This footer provides information or links about the site's author/institutional sponsor, the date of the last revision made to the site, copyright information, comments form and navigational links.



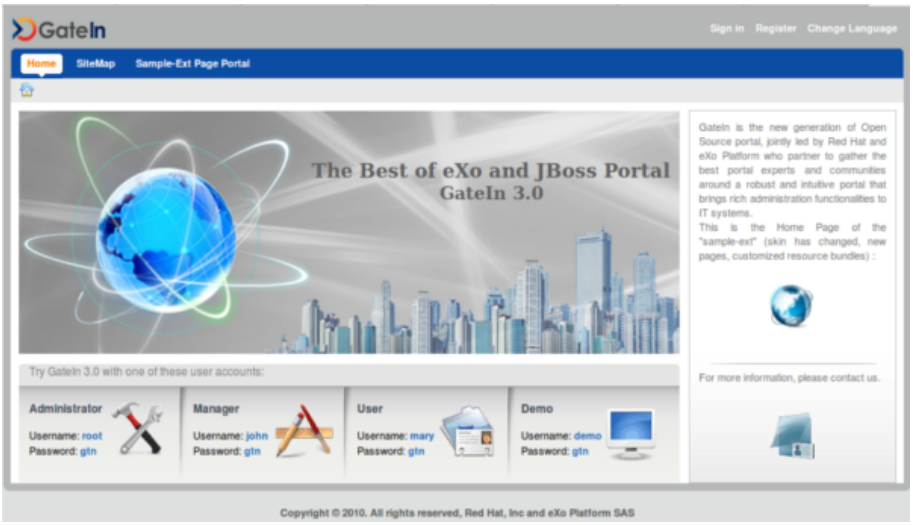
3.2.5. Gadget Wrapper portlet

This portlet allows users to view a gadget in canvas mode.



3.2.6. Homepage portlet

This portlet is the home page for a portal. The home page is the first page displayed when you visit the site.



3.2.7. IFrame portlet

This portlet is used to create inline frames (IFrame) elements for a site. An Iframe is an HTML element which can embed another document into a parent HTML document. By using IFrames, the embedded data is displayed inside a sub-window of browser. This does not mean the full inclusion, the embedded document is independent and both documents are considered as separated documents.

3.2.8. Navigation portlet

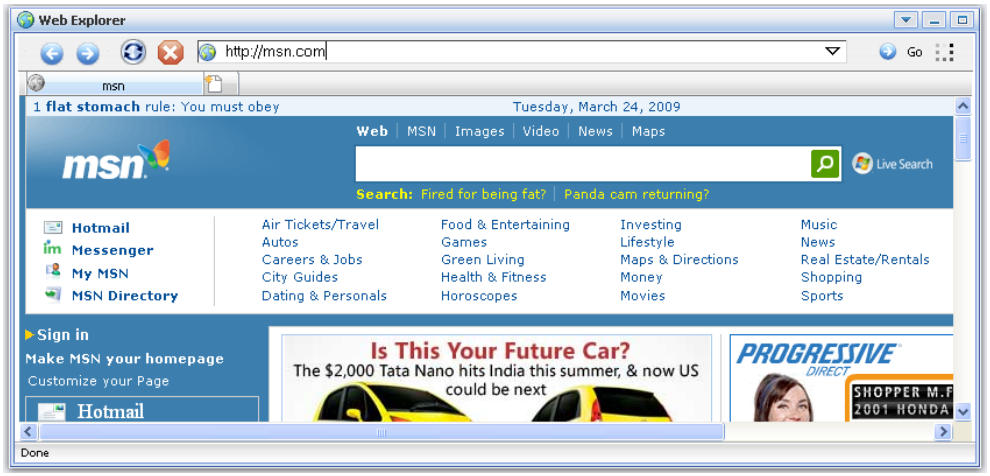
This portlet provides a navigation bar. A navigation bar is a menu that helps users to visualize the structure of a site and provide links to quickly move from page to page.

3.2.9. Sitemap portlet

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

3.2.10. Web Browser portlet

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



3.3. Dashboard portlet

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

In the Dashboard portlet, you can do some specific actions as follows:

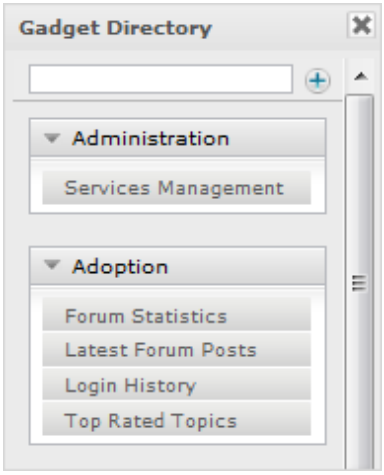
- Use the Dashboard workspace [23]
- Change gadget preferences [24]
- Add more external gadgets from Dashboard [25]

Note

You can open many gadgets with different settings at once.

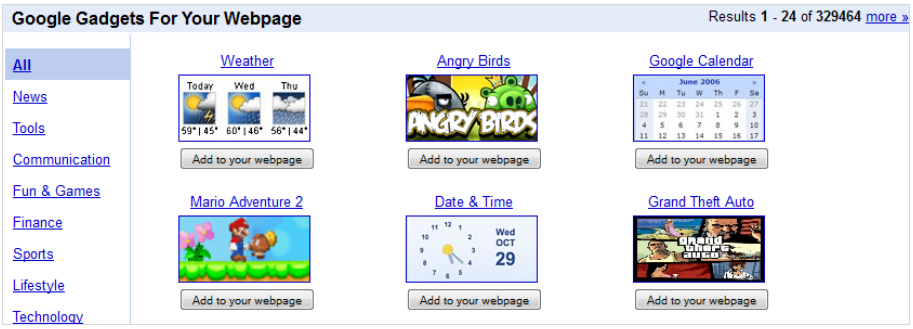
Use the Dashboard workspace

1. Click **Dashboard** on the **Administration** bar to access the **Dashboard** portlet.
2. Click **Add Gadgets** to open the **Dashboard Workspace** window which lists all available gadgets.



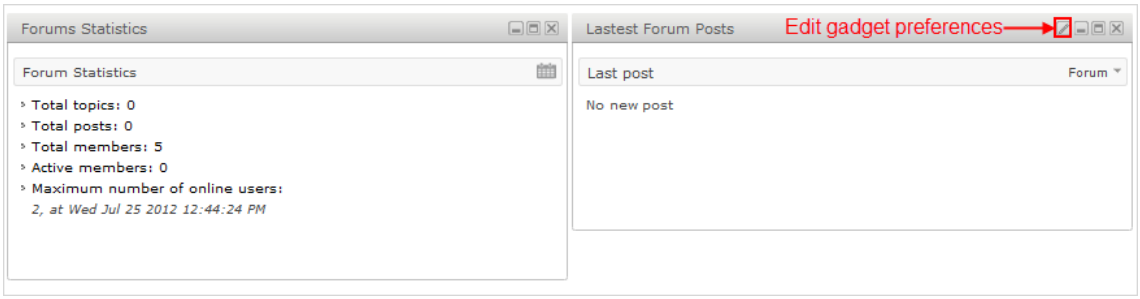
3. Select a gadget in the **Dashboard Workspace** window.
4. Drag and drop the selected gadget into the workspace.

In addition, eXo Platform is compatible with most gadgets which can be found here.



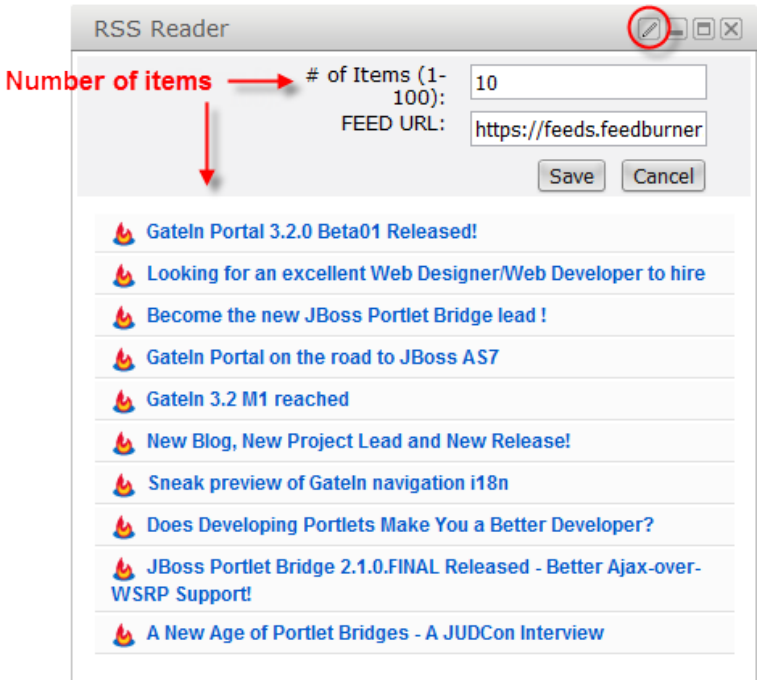
Change gadget preferences

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



The following is an example of changing preferences of the **RSS Reader** gadget.

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



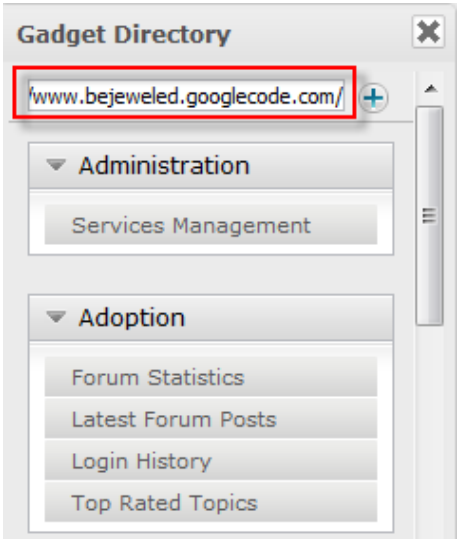
2. Enter your preferred RSS into the **FEED URL** field and one numeric character (from 1 to 100) in the **Items** field. The numeric character you entered is the number of items displayed in the RSS gadget.
3. Click **Save** to accept your changes.

Add more external gadgets from Dashboard

1. Obtain the URL (.xml or .rss) of the gadget you want to add from the gadgets source. For example, *http://bejeweledg.googlecode.com/svn/trunk/bejeweled.xml.*

> **Note**
>
> Remote gadgets can be only created using an .xml link or RSS URL. However, if you use a link that generates an RSS feed (for example, http://feeds.feedburner.com/gatein), a new RSS reader gadget will be created automatically even if the URL does not end with *.rss*.

2. Return to your portal and click **Dashboard** in the **Administration** bar.
3. Click **Add Gadgets** in the Dashboard to open the **Dashboard Workspace** window.
4. Paste the URL in Step 1 into the textbox.



5. Click ⊕ to add the new gadget to the page.

Portal Administration

> **Note**
>
> The functions stated in this section are advanced and for users as administrators only.

4.1. About Administration bar

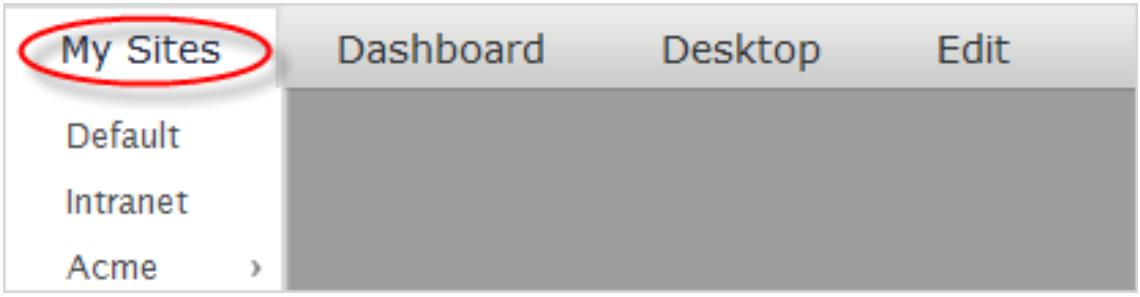
The **Administration** bar is a toolbar which allows users and administrators to execute tasks within the portal quickly and easily.

Depending on the role of each user, he/she can see different actions on the *Administration* bar.

4.1.1. User actions in the Administration bar

My Sites

This navigation contains different sites available in eXo Platform and allows users to directly edit the navigation tree.

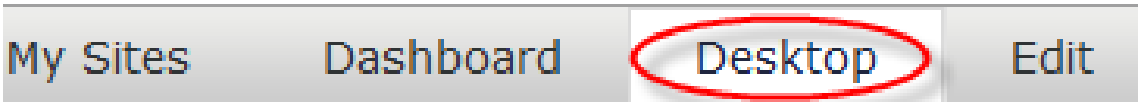


Dashboard

This navigation is used to create your own pages of gadgets.

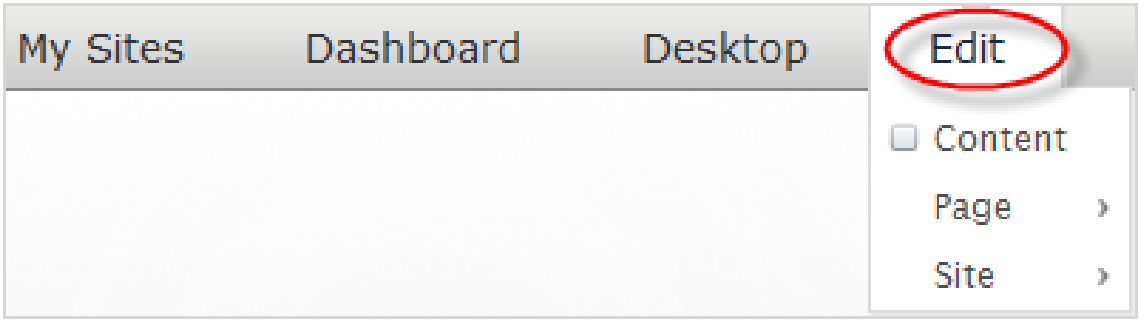
Desktop

This navigation allows you to store and perform all applications and actions in one bar that is similar to working on a desktop.



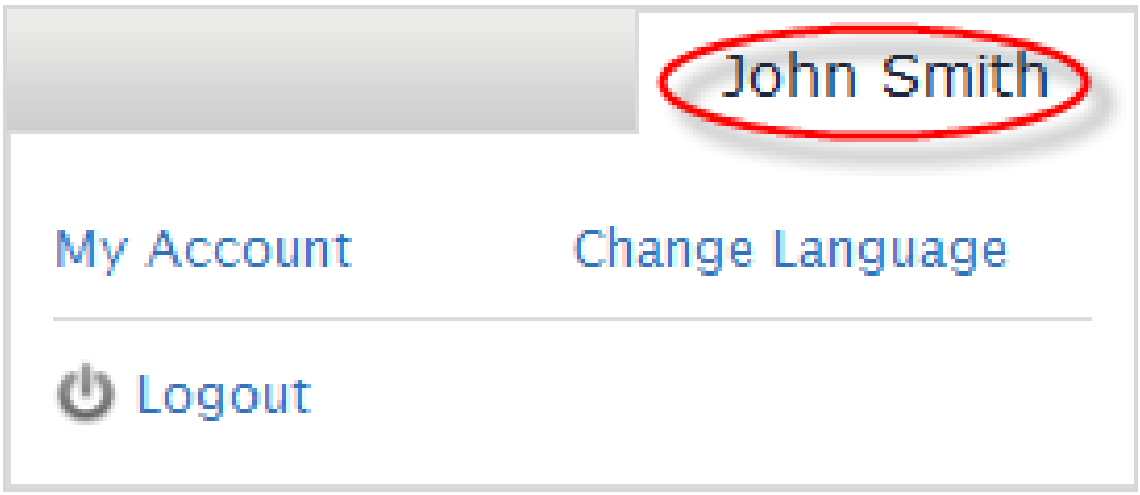
Edit

This navigation allows you to manage content, page and site (for example, editing the content, adding new pages to the current portal, editing properties of a page, or changing a page's layout).



User Menu

You can use the main menu (located under your display name) to change your account information, the portal language or to sign out, and more.



4.2. Manage sites

- Create a new portal

  Steps to create a new portal and configure its settings.
- Switch between portals

  Steps to navigate between portals.
- Edit a portal

  Ways and steps to edit the layout, navigation and configuration of a portal.
- Delete a portal

  Steps to remove a portal.

See also

- Manage permissions
- Manage a sample accessible website
- Manage navigation nodes
- Manage pages
- Manage applications

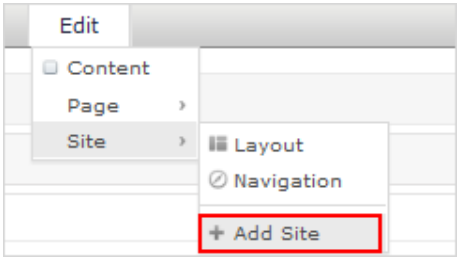
4.2.1. Create a new portal

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

1. Open the **Create New Portal** window by following one of the two ways:

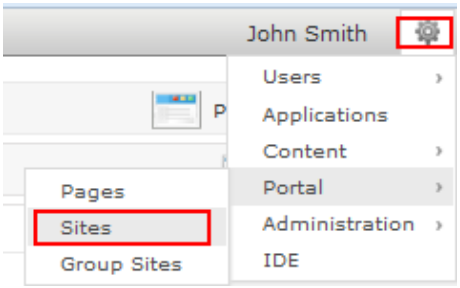
   The first way

   Hover your cursor over **Edit** --> **Site** on the **Administration** bar, then select **Add site** from the drop-down menu.

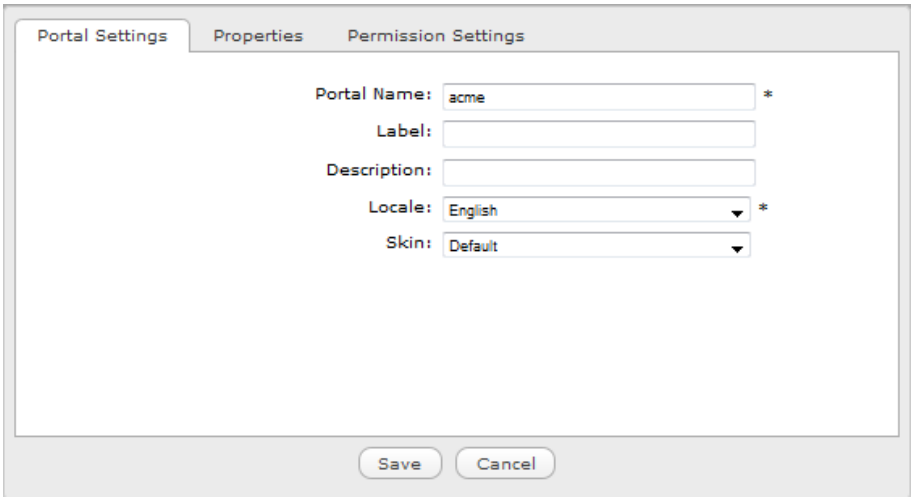
   The second way

   i. Hover your cursor over on the **Administration** bar, then select **Portal** --> **Sites** from the drop-down menu.

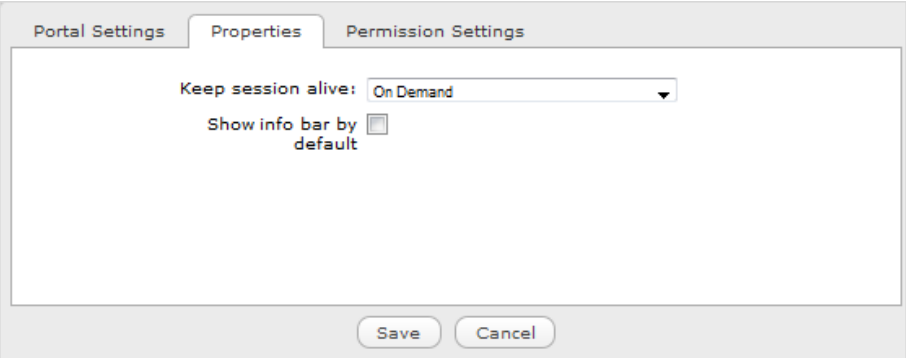
   

   ii. Click the **Add New Portal** button.

   By default, the **Create New Portal** window, which contains the **Portal Settings** tab, will open.

2. Enter a string into the **Portal Name** field. This field is required and must be unique. Only alphabetical, numerical and underscore characters are allowed for this field with the length from 3 to 30 characters.
3. Select the default display language for the portal from the **Locale** field.
4. Click the **Properties** tab to set the properties of a portal.



Details:

Field	Description
Keep session alive	Keep the working session for a long time to avoid the time-out. There are 3 options: **Never:** The session will time out if the logged-in user does not do any action after a given period. In this case, there will be a message which asks the user to log in again. **On Demand:** The session will time out to the application's requirement. If there is no request from the application, the session will time out after the given period that is similar to that of **Never.** **Always:** The session will never time out even if the logged-in user does not do any action after a long time.
Show info bar by default	Tick the checkbox to show the info bar of the porlet by default when the portlet is used in a page of the portal. The "Show info bar by default" option only takes effect on new porlets as from the time you select the checkbox rather than all portlets of the portal. In particular, after creating your new portal with the "Show info bar by default" option checked, newly created portlets of the portal will be displayed with the info bar by default. However, if you deselect the "Show info bar by default" option when editing the portal's configuration, the former portlets with the shown info bars are remained; meanwhile new portlets, which are created after this option is deselected, will be shown without the info bars.

5. Click the **Permission Settings** tab to set permissions on the portal.

   The list of *Access* permissions for the portal is empty by default. You have to select at least one or tick the **Make it public (everyone can access)** checkbox to assign the *Access* permission to everyone.

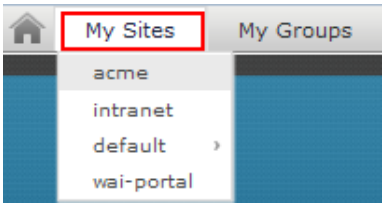
> **Note**
>
> For more details on how to grant permissions on the portal, see the Set permissions on a portal section.

6. Click the **Portal Templates** tab to select the template for your portal.
7. Click **Save** to accept creating your new portal.

4.2.2. Switch between portals

This function enables you to select and use another portals (gateway, starting site). You can perform this action only when you are assigned the appropriate permission by the administrators.

To switch between portals, hover your cursor over **My Sites** on the **Administration** bar for a list of all portals in which you have at least access rights, then click the desired portal. You need to wait a few seconds to be switched to your selected portal.



4.2.3. Edit a portal

> **Note**
>
> The function allows you to edit layouts, navigations and properties of a portal. To do this, you must have the *Edit* permission by contacting your administrator.

When you have the Edit permission, follow either of two ways below to go to the relevant form that allows you to do actions related to editing a portal.

The first way

1. Hover your cursor over **My Sites** on the **Administration** bar and select the portal you want to edit from the drop-down menu.

   You will be switched to your selected portal just after a few seconds.

2. Hover your cursor over **Edit** on the **Administration** bar to open the drop-down menu.

   i. Select **Site** --> **Layout**.

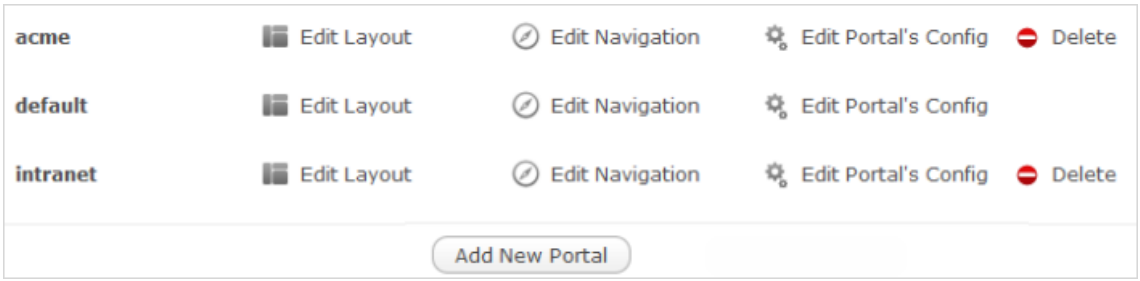
   You will be directed to the **Edit Portal** page. From here, you can make changes on the layout of your selected portal, or on its configurations by selecting **Site's Config** at the bottom of the **Edit Inline Composer** form.

   ii. Select **Site** --> **Navigation**.

   From here, you can edit your selected portal's navigation.

The second way

1. Hover your cursor over to open the drop-down menu.
2. Select **Portal** --> **Sites** to show the list of active portals.



3. Specify your desired portal, and do the following actions:

- Edit the portal's layout by clicking **Edit Layout.**

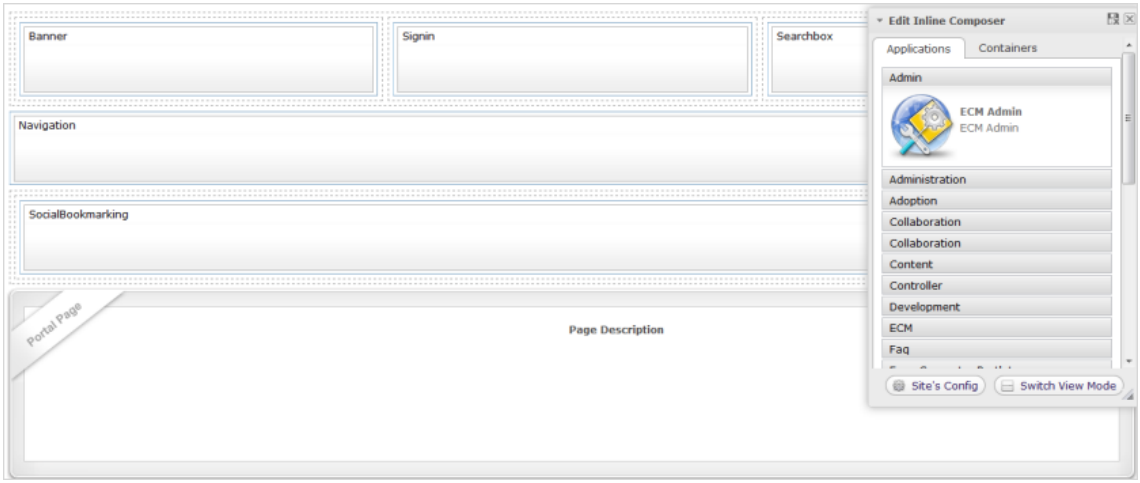
- Change the portal's navigation by clicking **Edit Navigation**.
- Edit the portal's configurations by clicking **Edit Portal's Config**.
- Delete the portal by clicking **Delete**.

4.2.3.1. Edit layout

To edit your selected portal's layout, your first need to follow one of ways above [31] to open the **Edit Layout** form.

New applications, containers or gadgets can be dragged and dropped from the **Edit Inline Composer** window to the main portal body.

You can rearrange elements in the portal body by dragging and dropping them into your desired positions. Also, you can edit or remove any element by hovering your cursor over it and selecting , or respectively.

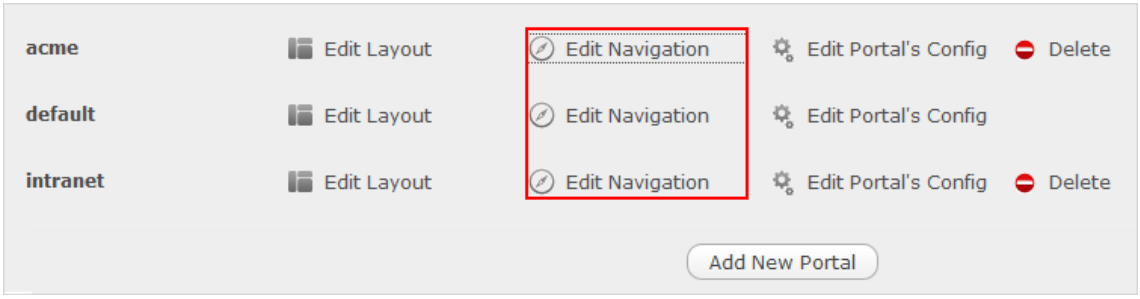


Note

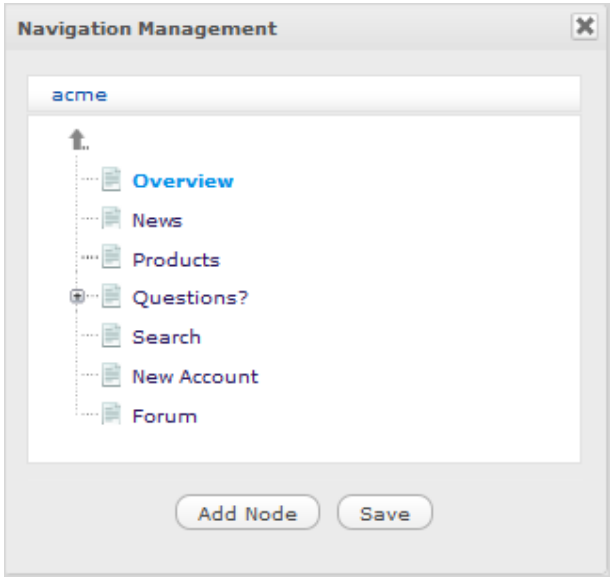
For more details on how to edit elements, see the Edit a specific portlet section.

4.2.3.2. Edit navigation

To edit your selected's navigation, your first need to follow one of ways above [31] to open the **Edit Navigation** form.



The **Navigation Management** form appears.

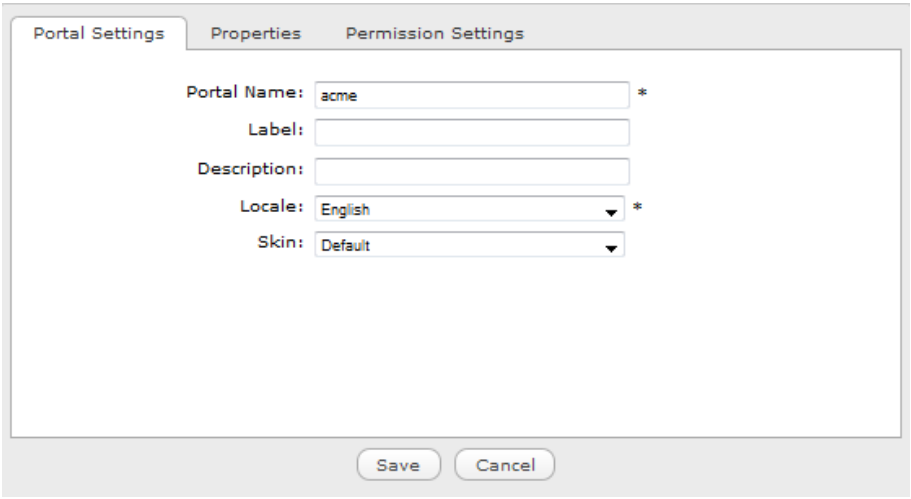


Note

For more information about actions, which can be done in the Navigation Management [32] form, see the Manage navigation nodes section.

4.2.3.3. Edit configurations

Configurations of a portal include settings, properties and permissions that can be set by following one of ways above[31] to open the **Edit Configurations** window.



In this window, you can make changes on fields in the various tabs, except the **Portal Name** in the **Portal Settings** tab.

Note

For more details on these fields, refer to the Create a new portal section.

4.2.4. Delete a portal

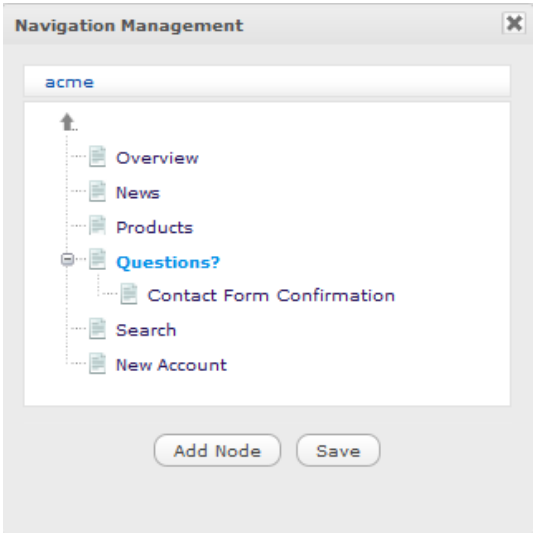
> **Note**
>
> To delete a portal, you must be in the group that has the **Edit Permission** on that portal.

1. Open the list of existing portals by following steps as stated in the second way. [31]
2. Click **Delete** corresponding to the portal you want to delete.
3. Click **OK** in the confirmation message to accept your deletion.

4.3. Manage navigation nodes

In the following sections, you will learn to Add a new node[34], Edit a node[37], Copy/Paste a node[37], Clone a node [37], Cut a node [37], Delete a node [38], Change nodes order [38].

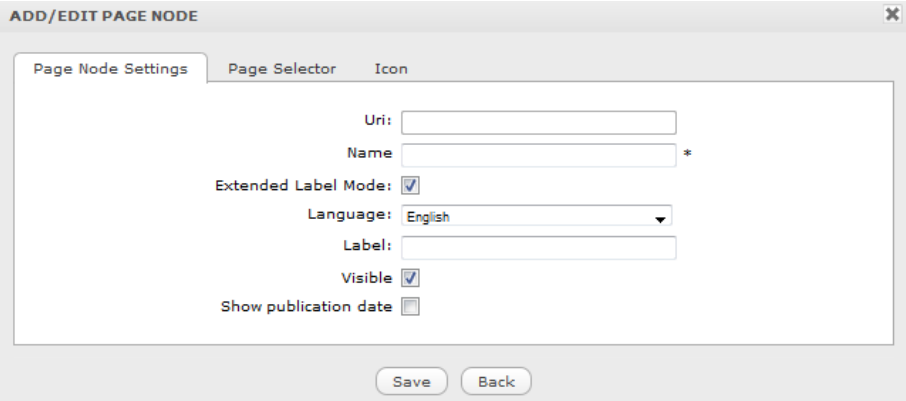
If you are the portal administrator or granted the appropriate permission privileges by the portal administrator, you can execute some special actions related to portal nodes, including copying, editing, cutting, cloning, deleting, adding existing nodes. To do so, you first need to go to the nodes list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



Add a new node

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

   The **Add/Edit Page Node** form appears.
2. Enter values in the **Page Node Settings** tab.



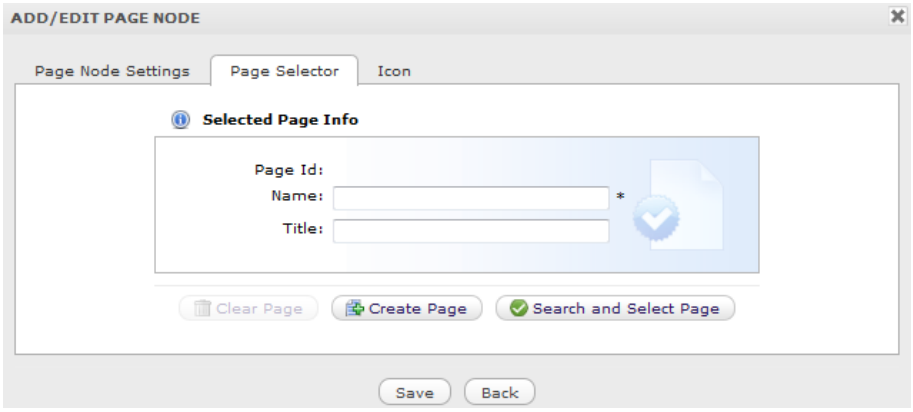
Details:

Field	Description
Asterisk (*)	This mark next to each field means that it is required to enter values in the field.
Uri	An identification of the node that is auto-created after the new node has been created.
Node Name	The node name which must be unique. Only alphabetic, numeric and underscore characters are allowed with its length from 3 to 30 characters and without ANY SPACES.
Extended Label Mode	Tick this checkbox to activate the extended label mode for your page node's label. If this checkbox is deselected, the **Language** field will disappear.
Language	Select your desired language for the node label from the drop-down menu.
Label	The display name of the node on the screen in the selected language. This field is not required and may be changed. Its length must be between 3 and 120 characters, including SPACES. For example, if you want to create a French label for your node, first select the **Extended Label Mode** checkbox. Next, from the **Language** drop-down list, select your desired language and enter your French label into the **Label** field.
Visible	This checkbox enables the page and its node to be shown or hidden at the navigation bar and sitemap.
Publication Date & Time	This option enables this node to be published for a given period. Two fields, including **Start Publication Date** and **End Publication Date** only display when this option is checked.
Start Publication Date	The start date and time to publish the node.
End Publication Date	The end date and time to publish the node.

Note

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

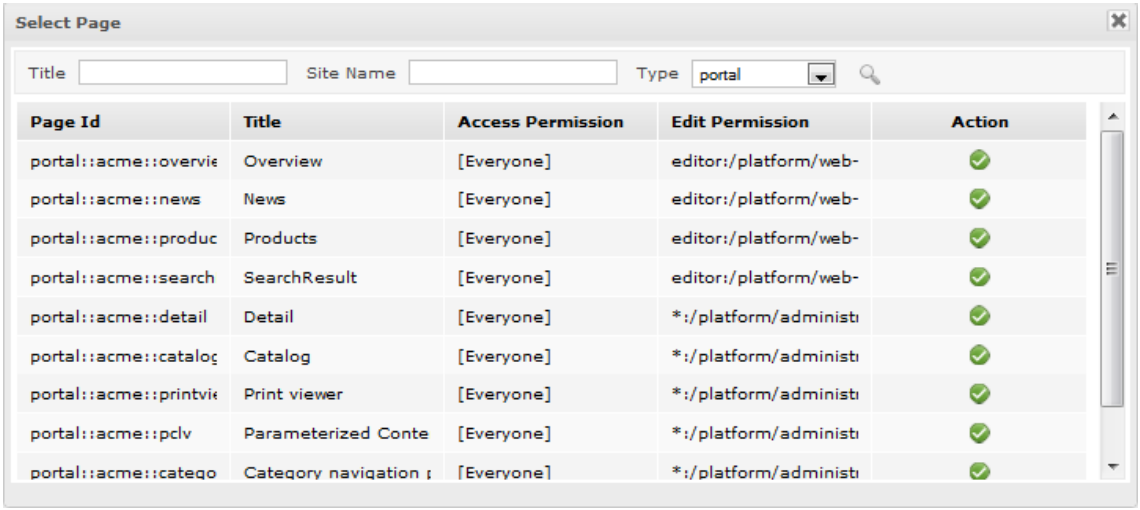
3. Select a page for this node in the **Page Selector** tab if you want.



Details:

Field	Description
Page Id	The identification string of the page which is created automatically.
Name	The selected page's name.
Title	The selected page's title.
Clear Page	Remove the inputted page information from fields.
Create Page	Create a new page with the inputted name and the title.
Search and Select Page	Search and select an existing page.

- If you select **Create Page**, input the name and title for the page.
- If you select **Search and Select Page**, you do not need to enter values in these fields. They are automatically recorded after you have selected an existing page from the **Select Page** form.



This window lists all existing pages of **Portal** or **Group** with basic information for each page.

You can select a page for creating a node by simply clicking , or search for a specific page as follows:

i. Enter your page title into the **Title** field to search by title;

Or, enter the site name into the **Site Name** field to search by the page's site name;

Or, enter values into both fields to further limit your search results by both **Title** and **Site Name.**

ii. Select the area in which you want to search into the **Type** field.

iii. Click to perform your search. All pages matching your search criteria will be listed.

iv. Click on the row of the page to select.

After selecting a page, you will see the page details in the **Page Selector** form.

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

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

Edit a node

This function is used to edit the node settings and reselect a page for a node.

1. Select **Edit this Node** from the drop-down menu to open the form with all similar fields when you add a new node. [34]
2. Change values in fields of the current node, except the **Node Name**.
3. Click **Save** to complete your changes.

Copy/Paste a node

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

1. Select **Copy Node** from the drop-down menu.
2. Right-click the position you want to paste this node and select **Paste Node**.
3. Click **Save** to accept your changes.

> **Note**
>
> Two same node names in the same place are NOT allowed.

Clone a node

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

1. Select **Clone Node** from the drop-down menu.
2. Right-click the position that you want to paste this node and select **Paste Node.**

   The cloned node will be reproduced in a new place.
3. Click **Save** to accept your changes.

Cut a node

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

1. Select **Cut Node** from the drop-down menu.
2. Select the position that you want to paste this node, then click **Paste Node**.
3. Click **Save** to accept your change.

   The cut node will be moved to your newly selected place.

Note

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

Delete a node

This function is used to remove a node linking to a page. After the node has been removed, the page has been still existing.

1. Select **Delete Node** from the drop-down menu.
2. Click **OK** in the confirmation message to accept your deletion.
3. Click **Save** to accept your change.

Change nodes order

You can easily move the position of nodes up or down in the navigation bar following these steps:

1. Select **Move Up** or **Move Down** from the drop-down menu.
2. Click **Save** to accept your changes.

See also

- Manage permissions
- Manage sites
- Manage a sample accessible website
- Manage pages
- Manage applications

4.4. Manage pages

- Add a new page using Page Creation Wizard

  The whole process to create a new page using **Page Creation Wizard**, including: selecting a navigation node and creating the page, selecting a page layout template, and finally arranging the page layout.
- Add a new page using Page Management

  Step-by-step instructions on how to add a new page using **Page Management**.
- Edit a page

  Steps and ways to edit the page properties and layout.
- Delete a page

  Steps to remove a page.
- Manage page navigation

  Information and actions related to the page navigation of portal/user/group.

See also

- Manage permissions
- Manage sites
- Manage a sample accessible website
- Manage navigation nodes
- Manage applications

4.4.1. Add a new page using Page Creation Wizard

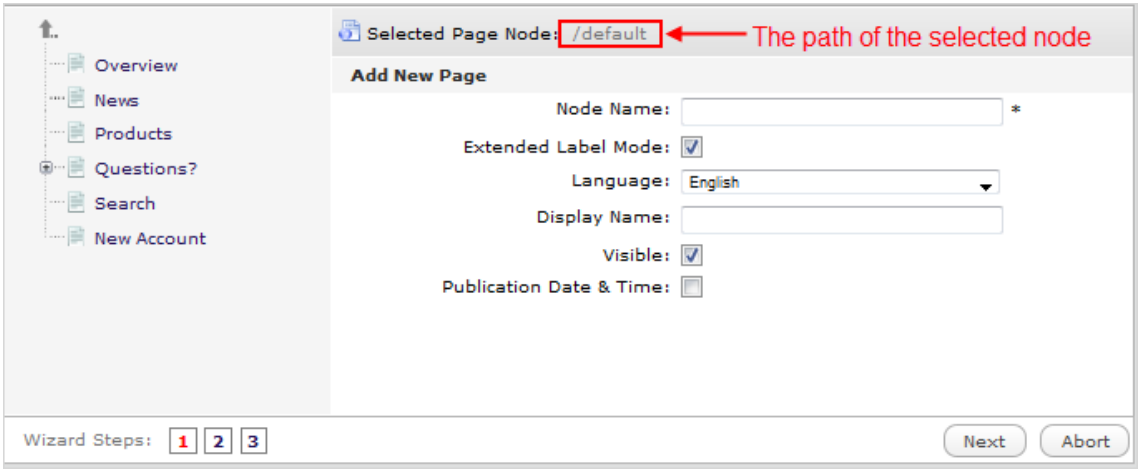
The **Page Creation Wizard** is available to the portal's administrators and facilitates them to create and publish portal pages quickly and easily. The whole process to create a new page can be divided into **3** specific steps:

Select a navigation node and create the page

In the first step, you have to set **Node Name** and **Display Name** of your page. You are also able to decide the pages visibility and the publication period of the page.

1. Hover your cursor over **My Sites** and click one portal/site to which you want to add a new page from the drop-down menu.

   You will be switched to your selected portal only after a few seconds.
2. Hover your cursor over **Edit** on the **Administration** bar.
3. Select **Page** --> **Add Page** from the drop-down menu to open the **Page Creation Wizard** form.



The wizard is divided into two sections.

- The left pane contains existing pages/nodes displayed in the tree hierarchy. Here, you can navigate up and down the node/page structure.
- The right pane displays **Page Editor** where you can make changes on the selected navigation node. You can input parameters for your new page in this pane.

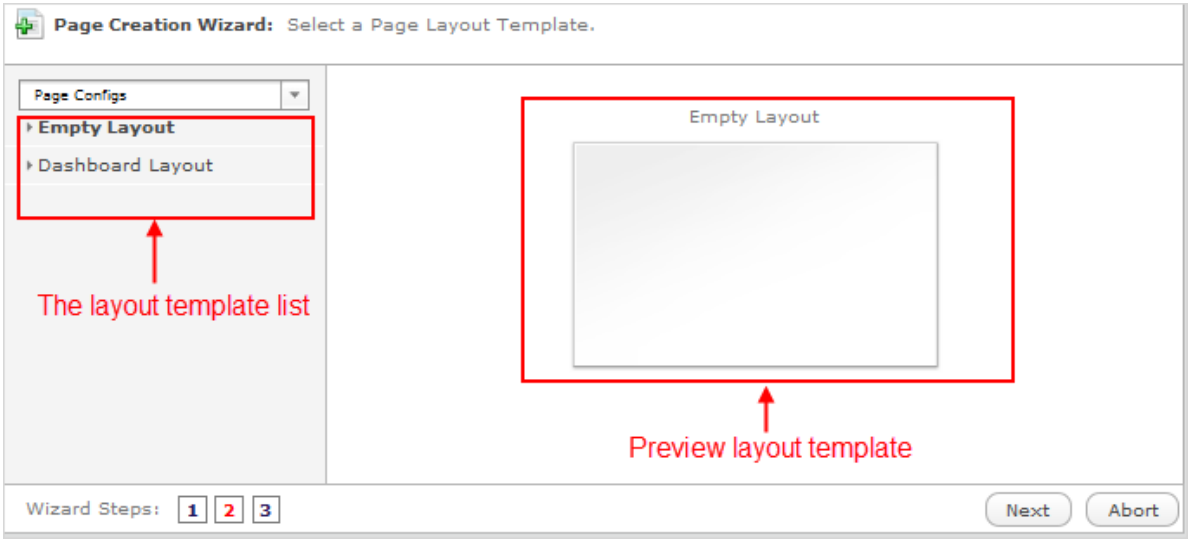
Details:

Field	Description
Selected Page Node	The path of the selected node to add a new sub-page.
Node Name	The node name of the added page. This field is required with its length between 3 and 30 characters.
Extended Label Mode	Tick the checkbox to show the **Language** field for you to select another language for your created node's display

Field	Description
	name. It means that if this checkbox is deselected, the **Language** field will be deactivated.
Language	Select your desired language for the node's display name from the drop-down menu.
Display Name	The display name of the node which contains the added page and must have a length between 3 and 120 characters.
Visible	This checkbox toggles the global visibility of this page. If this option is checked, the page or the page node appears on the navigation bar, the page navigation and the sitemap. If "Visible" is checked, the visibility also depends on the **Publication Date & Time** option. If not being unchecked, the page is hidden under any circumstances, even if the publication period is valid.
Publication Date & Time	This option allows the page to be published for a given period. If this option is checked, **Start Publication Date** and **End Publication Date** will be shown.
Start Publication Date	The start date and time to publish the page.
End Publication Date	The end date and time to publish the page.

4. Click **Next** or number '2' of the wizard steps to go to Step 2. [40]

Select a page layout template

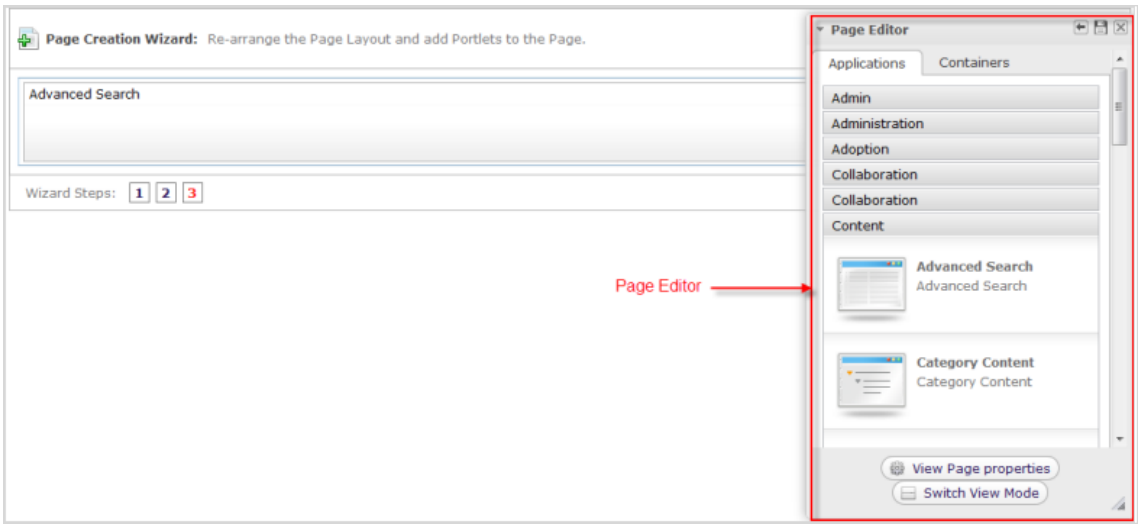


1. Select **Empty Layout** or click the down-arrow icon in the right pane to see more templates.
2. Click **Next** or number '3' of the wizard steps to go to the last step. [40]

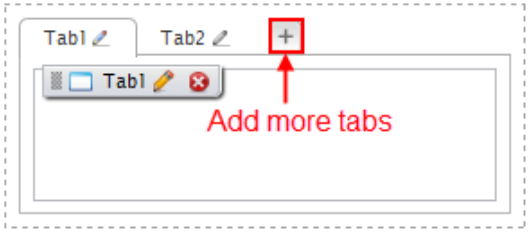
Arrange the page layout

In this step, you can arrange the page's layout as follows:

- Add your desired applications, containers or gadgets by dragging and dropping them from **Page Editor** to the main page body.



Details:

Tab	Description
Applications	This tab lists all existing categories and their portlets that you easily can drag and drop into the container.
Containers	This tab contains all existing containers to build your page layout. You can add a container to your page area by dragging and dropping available containers from **Page Editor** to the main page body. • There are various layouts available, including **Rows Layout**, **Columns Layout**, **Autofit Columns Layout**, **Tabs Layout**, and **Mixed Layout**. For **Tabs Layout**, you can add more tabs to the layout, and reorder the position of the tabs.  • For each layout, you can edit different layers, from the parent container to its child containers. The parent container holds its child containers and the child containers can hold applications. You can also drag a container to another one that helps you create various layouts to your desires. • Remember that you can also drag and drop the container to another one that helps you create your own various layouts to your desires. • For any container layout, you can edit the parent container or its child containers separately. Deleting

Tab	Description
	the parent container means that its child containers are removed as well. • You cannot drag and drop a child container to change its location, but can drag it outside its parent container.

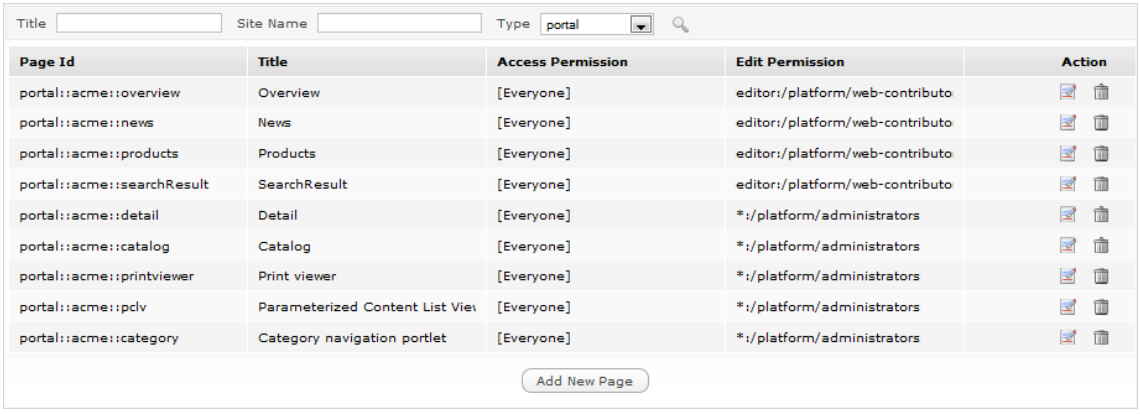
- Rearrange elements in the page body by dragging and dropping them into your desired positions. Also, you can edit or remove any element by hovering your cursor over it and selecting , or respectively.
- View page properties by clicking **View Page Properties** at the bottom of the **Page Editor** window.
- Preview your changes by clicking **Switch View Mode.**

Note

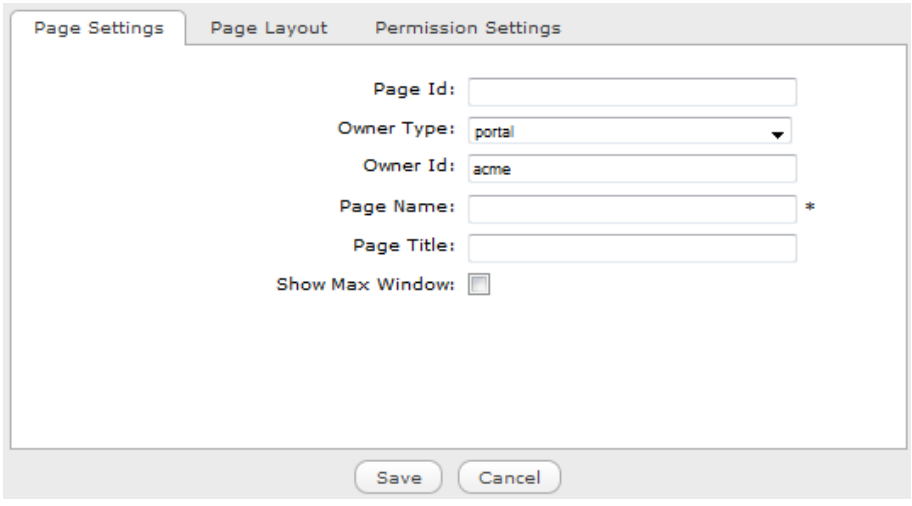
Click in the **Page Editor** window to save all changes, or to close without saving your changes.

4.4.2. Add a new page using Page Management

1. Hover your cursor over to open the drop-down menu.
2. Select **Portal** --> **Pages** to go to the **Pages Management** page.



3. Click **Add New Page** to open the **Add New Page** form with the **Page Settings** tab.



Details:

Field	Description
Page Id	The page's identification string which will be automatically generated when the page is created.
Owner Type	• If **Owner Type** is "*portal*", the page is created for a portal. Therefore, only users who have the *Edit* permission on the portal can create this page type. • If **Owner Type** is "*group*", the page is created for a group. Therefore, only users who are the *manager* of that group can create this page type.
Owner Id	The identification name of the page's owner which will be automatically created after you have selected **Owner Type**. • When the owner type is set to "group", a list of groups will allow you to select one user as the 'owner'. • The name of the current portal is automatically selected for **Owner Id**, ensuring the *Edit* permission is assigned to users who can edit the current portal.
Page Name	The page name which is required and must be unique. Only alphabetical, numerical and underscore characters are allowed with its length from 3 to 30 characters.
Page Title	The page title which is optional with its length from 3 to 30 characters.
Show Max Window	The option enables the page to be shown at the maximum size or not.

4. Define the page layout in the **Page Layout** template.
5. Define permissions in the **Permission Settings** tab. This tab consists of two sub-tabs named **Access Permission Settings** and **Edit Permission Settings**.
   - The **Access Permission Settings** tab shows all users who can access the page:
     - If the value of the **Owner Type** field is "*Portal*", the name of the current portal is automatically selected for the **Owner Id** field, so that the *Access* permission is assigned to all users who can access the current portal.
     - If the value of the **Owner Type** field is "*Group*", the *Access* permission is assigned to all users who are the members of the group that is selected in the **Owner Id** field of the **Page Settings** tab.

     To reassign the *Access* permission for the page, see details in the Access permission [57] section.
   - The **Edit Permission Settings** shows all users who have the *edit* permission on the page.
     - If the value of the **Owner Type** field is "*Portal*", the *Edit* permission is assigned to users who can edit the current portal.
     - If the value of the **Owner Type** field is "*Group*", the *Edit* permission is assigned to all users who are the members of the group that is selected in the **Owner Id** field of the **Page Settings** tab.

     To reassign the *Edit* permission for the page, see details in the Edit Permission [58] section.
6. Click **Save** to accept creating a new page.

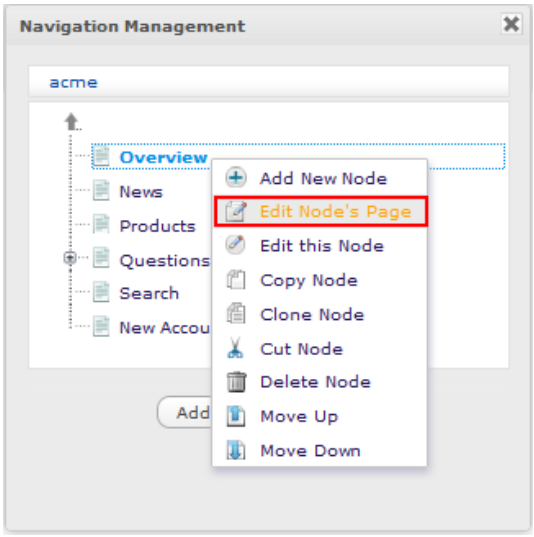
4.4.3. Edit a page

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

The first way

i. Open the **Navigation Management** form by doing the steps in the Edit navigation section.

ii. Right-click your desired node and select **Edit Node's Page** from the drop-down menu.

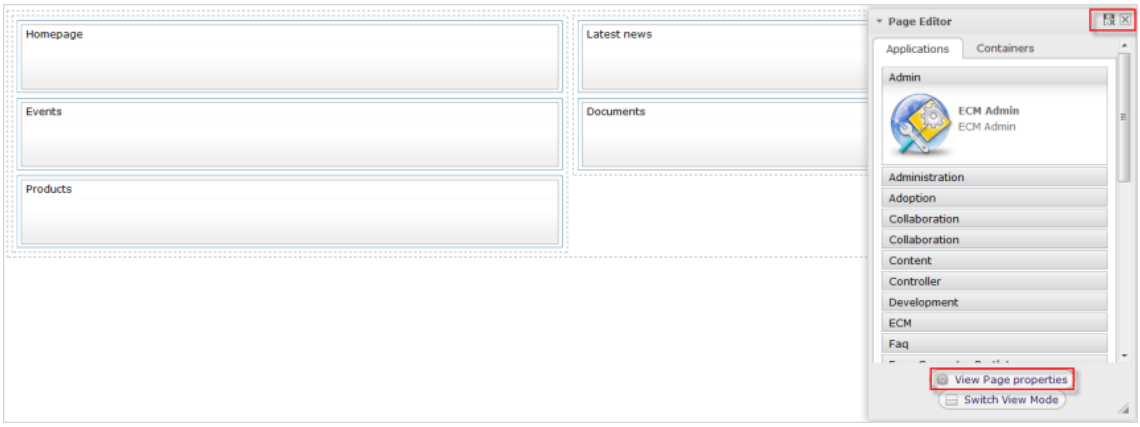


The second way

i. Hover your cursor over and select **Portal** --> **Pages** to open the **Pages Management** page.

ii. Click corresponding to the page you want to edit.

The **Edit Page** form will be displayed in the **Page Properties** window.



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

   i. In the **Page Settings** tab, you cannot change values in **Page Id, Owner Type, Owner Id,** and **Page Name**.

   ii. In the **Permission Settings** tab, you can change or add more *Access* and *Edit* permissions. This form is only supported for pages of a *group* or a *portal.* Because the user's page is private, no one can access or edit it, except the creator.

   > **Note**
   >
   > For more details on how to assign permissions on a page, refer to the Set permissions on a page section.

3. Click **Save**, then select in **Page Editor** for all changes to take effect, or to abort.

4.4.4. Delete a page

1. Hover your cursor over and select **Portal** --> **Pages** to open the **Pages Management** page. You will see a list of all existing pages.
2. Click in the row of the page you want to delete.
3. Click **OK** in the confirmation message to accept your deletion.

4.4.5. Manage page navigation

Navigation types in eXo Platform are outlined in the Manage navigation nodes.

4.4.5.1. Portal's page navigation

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

Note

The page navigation of portal is created automatically when a portal is created.

The navigation will be deleted automatically after its portal has been deleted.

4.4.5.2. User's page navigation

Actions related to the page navigation of users include adding a new page, editing a page/page layout. These actions are based on permission settings set to a page.

Note

The page navigation of a user will be created automatically when the user is created (registered).

Only the user who is the owner of the user page navigation can edit it.

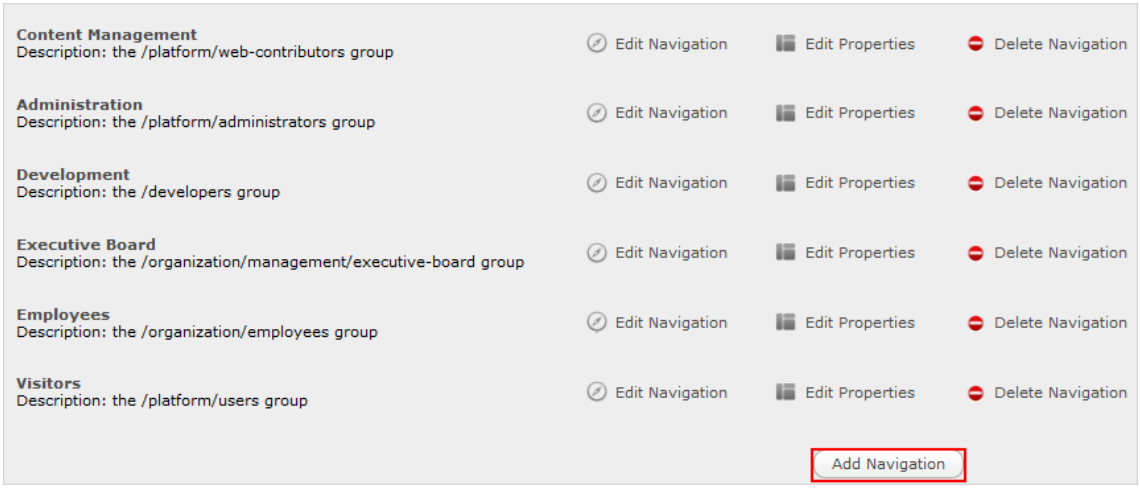
No one can create a user page navigation so that no one can delete it. The navigation will be deleted automatically when its user is deleted.

4.4.5.3. Group's page navigation

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

To manage the group's page navigation, hover your cursor over on the **Administration** bar, then select **Portal** --> **Group Sites** from the drop-down menu.

The **Group Navigation Management** page will appear.

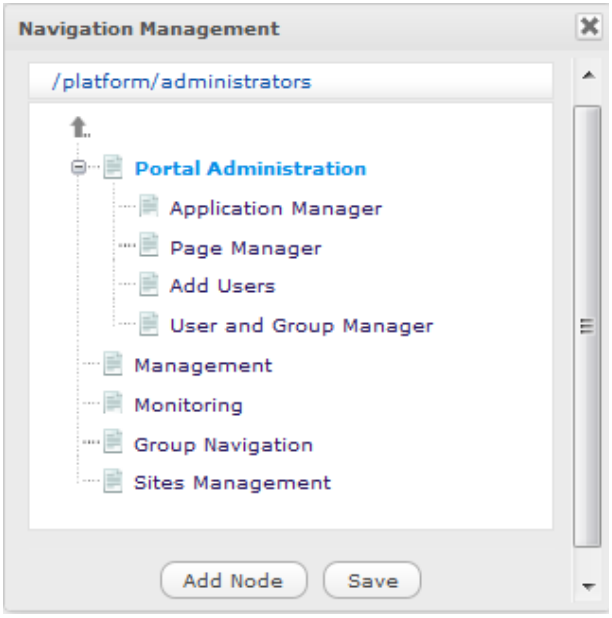


Here, you can do many actions, including:

- Edit a group's page navigation
- Create a new page navigation
- Change priority of page's navigation
- Delete a group's navigation

4.4.5.3.1. Edit a group's page navigation

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



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

4.4.5.3.2. Create a new page navigation

Note

Only users who are "managers" of a group can create new pages for that group, while others in this group cannot.

1. Select **Add Navigation** at the bottom of the **Group Navigation** form. The groups list will be displayed with the **Add Navigation** buttons.
2. Click **Add Navigation** corresponding to the group you want to add the new page navigation.

   After being added, the new group navigation will be displayed in the **Group Navigation** page.

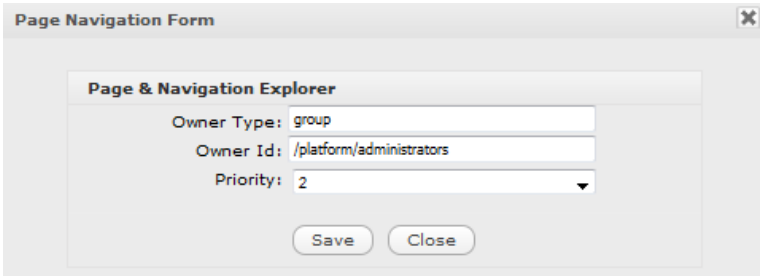
Each group has only one navigation. If you add a new group navigation that has been existing, there will be a message, informing that you cannot create the navigation.

4.4.5.3.3. Change priority of page's navigation

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

1. Click **Edit Properties** corresponding to the navigation you want to edit.

   The **Page Navigation Form** will appear.



2. Select another priority from the list of available priorities.
3. Click **Save** to accept changes.

4.4.5.3.4. Delete a group's navigation

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

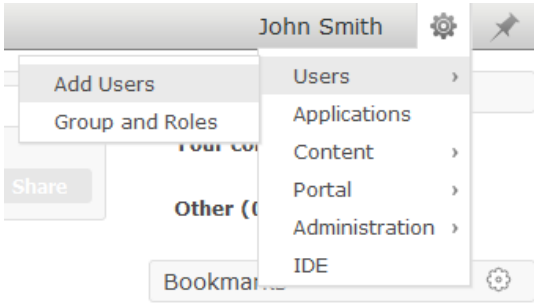
1. Click **Delete Navigation** corresponding to the navigation you want to delete.
2. Click **OK** in the confirmation message to accept your deletion.

After the navigation deletion has been confirmed, the selected navigation will be removed from the **Group Navigation** page and its nodes/hyperlinks to pages will also be deleted.

This section covers the following topics:

- **Add a user**
- **Manage users**
- **Manage groups**
- **Manage memberships**

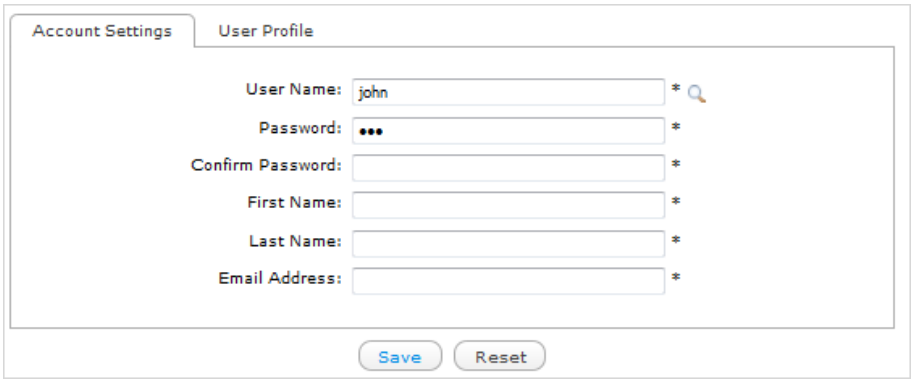
To perform these actions, you first need to hover your cursor over at the top right of the site, then select **User.**



4.5.1. Add a user

1. Click **Add Users** from the drop-down menu.

The **Create New Account** window will open with two tabs: **Account Settings** and **User Profile**.



2. Fill all fields in the **Account Settings** tab which must be completed. For more details on these fields, see here. [5]

   Further information about the user, such as nickname, or birthday, can be added in the **User Profile** tab that is not required.

3. Click **Save** to accept your new account. If you want to refresh the input information, simply click **Reset**.

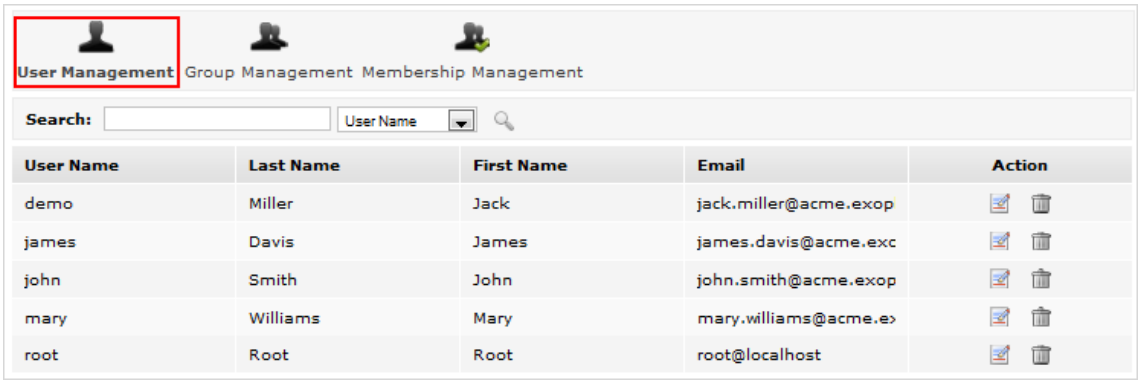
See also

- Manage users
- Manage groups
- Manage memberships

4.5.2. Manage users

By clicking **Groups And Roles**, you will see the **Organization** form which allows you to manage users, groups and memberships.

As an administrator, you can easily find, edit information of users, and even remove them from the system via the **User Management** tab. By default, all registered users will be shown in this tab.



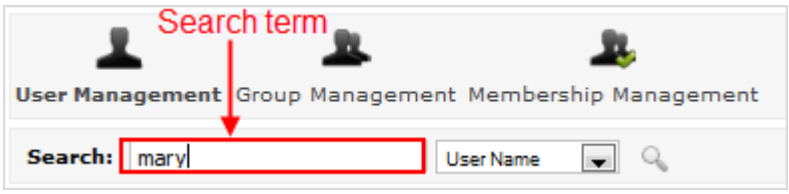
Via the **User Management** tab, you also can define each user belonging to user groups and his memberships (roles) in these groups. You cannot add users to a group but can remove them from the group.

In the following sections, you will learn to Search for users [49], Edit user information [49] and Delete a user [50].

Search for users

You can search for specific users by username, first name, last name or email address.

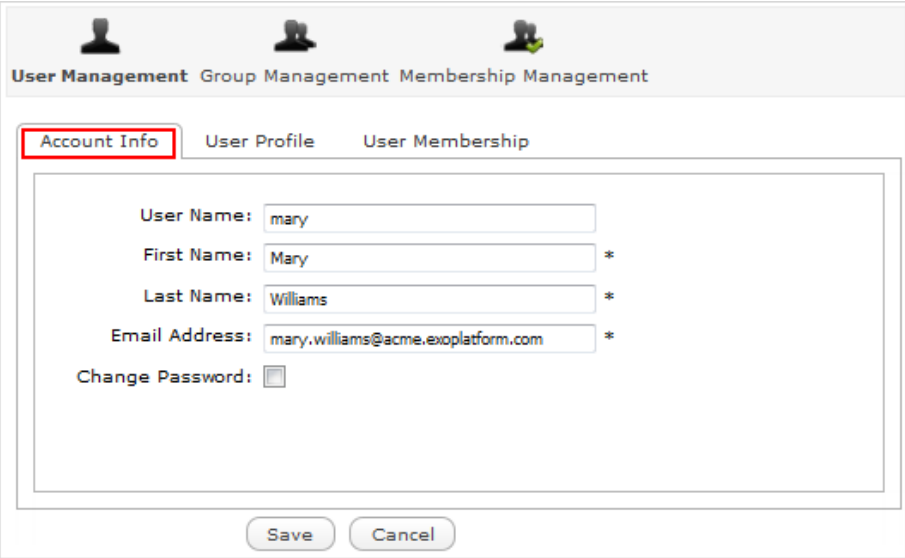
1. Type the search term related to the user you want to search. You do not need to enter an exact term.



2. Select the information type you want to search against.
3. Click , or hit the **Enter** key to perform your search.

Edit user information

1. Locate the user you want to edit his information.
2. Click corresponding to the user with the information you want to edit.
3. Select the **Account Info** tab to edit main information of the user, including **First Name**, **Last Name**, or **Email Address**.



Username

The **Username** cannot be changed.

Change Password

The **Change Password** option allows an administrator to set a new password for the selected user. When the **Change Password** option is unchecked, **New Password** and **Confirm Password** are hidden. Passwords must contain at least 6 characters, including letters, numbers and punctuation marks.

For more details on these fields, see here. [5]

4. Select the **User Profile** tab to edit the personal information of the selected user, including **Profile, Home** and **Business.** You may also switch the default display language for that user by selecting another language from the **Language** field where all available languages are displayed in the alphabetical order.
5. Select the **User Membership** tab to see the group membership information of the user.

   The **User Membership** tab displays which groups the selected user belongs to.

   To remove the user from a group, click .
6. Click **Save** to accept your changes.

Delete a user

1. Locate the user you wish to delete.
2. Click corresponding to the user you want to delete in the main **User Management** form.
3. Click **OK** in the confirmation message to accept your deletion.

See also

- Add a user
- Manage groups
- Manage memberships

4.5.3. Manage groups

- Add a new group

  Steps to add a new group to your organization.
- Edit a group

  Steps to edit information of current groups.

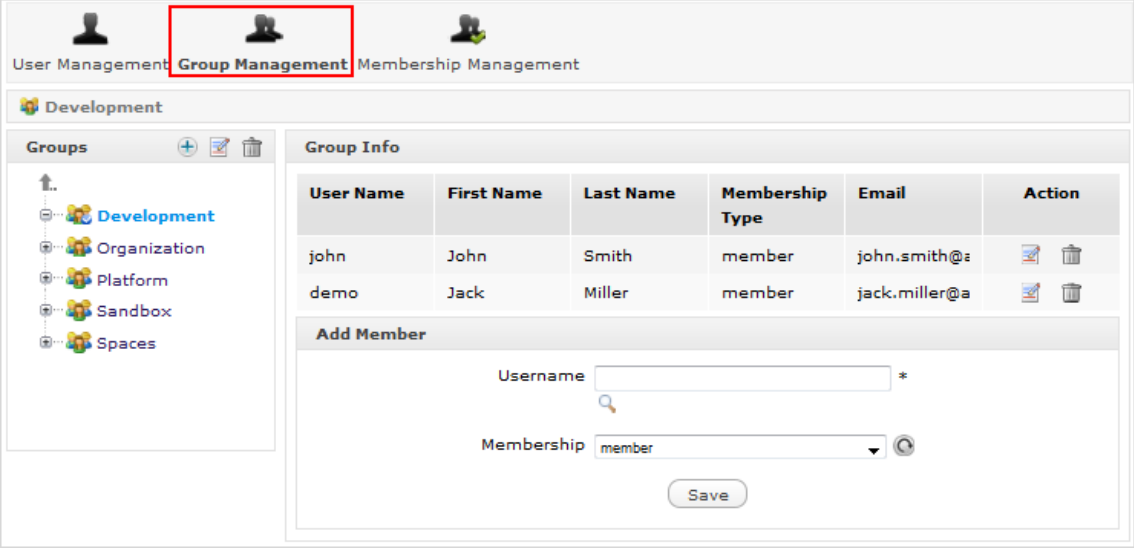
- Delete a group

  Steps to remove a group from your organization.
- Add a user to a group

  Steps to add members to a group.
- Edit a user membership in a group

  Steps to change the user's membership type in a group.

Select the **Group Management** tab in the **Organization** form. This tab is used to add, edit or delete a group. You can also add or delete a user to/from a group and edit the user membership in the group.



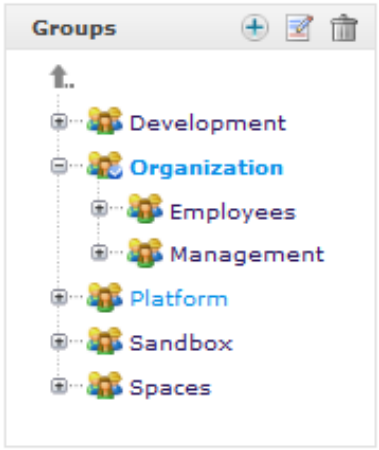
By default, all existing groups will be displayed on the left pane. The right pane shows information of the selected group and of its members with the **Add Member** form.

See also

- Add a user
- Manage users
- Manage memberships

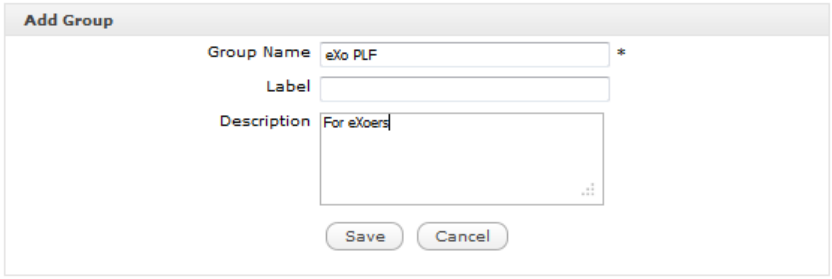
4.5.3.1. Add a new group

1. Select the path to create a new group by clicking the group from the left pane or by clicking if you want to create a group at a higher level. The selected path is displayed in the breadcrumb bar.



2. Click in the left pane.

   The **Add Group** form will be displayed in the right pane.



Details:

Field	Description
Group Name	Name of the group that is required and unique within the portal with its length from 3 to 30 characters. Only letters, numbers and underscore characters are allowed for the **Group Name** field.
Label	The display name of the group with any length from 3 to 50 characters.
Description	A description of the group with any length from 0 to 255 characters.

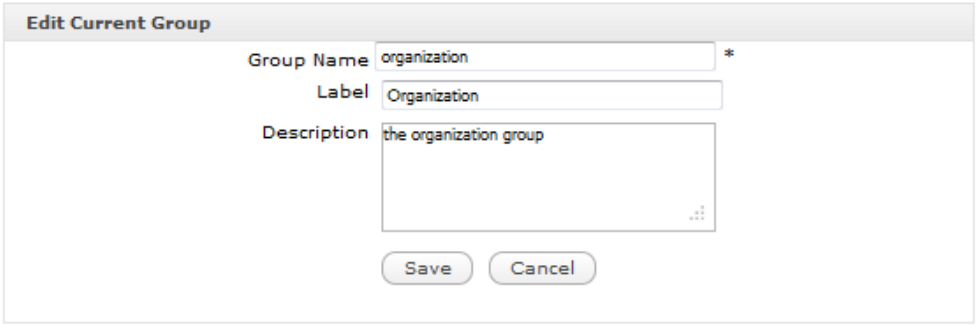
3. Fill in the required fields. Once being saved, the **Group Name** cannot be edited.
4. Click **Save** to accept creating the new group.

Note

The creator will automatically become the manager of that group. The creator's username will be added to the created group with the "manager" membership.

4.5.3.2. Edit a group

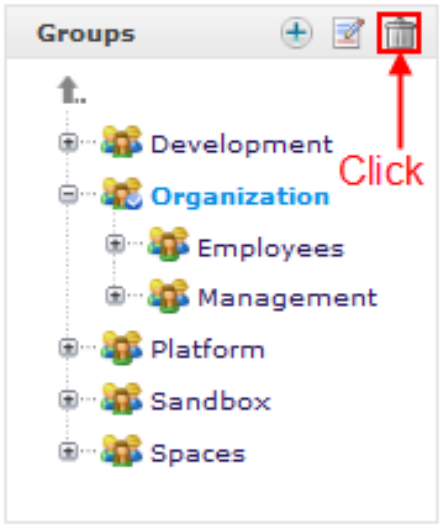
1. Click the group you want to edit in the left pane.
2. Click in the left pane to show the **Edit Current Group** form of the selected group.



3. Make changes on the fields, except **Group Name.**
4. Click **Save** to accept your changes.

4.5.3.3. Delete a group

1. Click the group you want to delete in the left pane.
2. Click in the row of the membership type you want to delete.



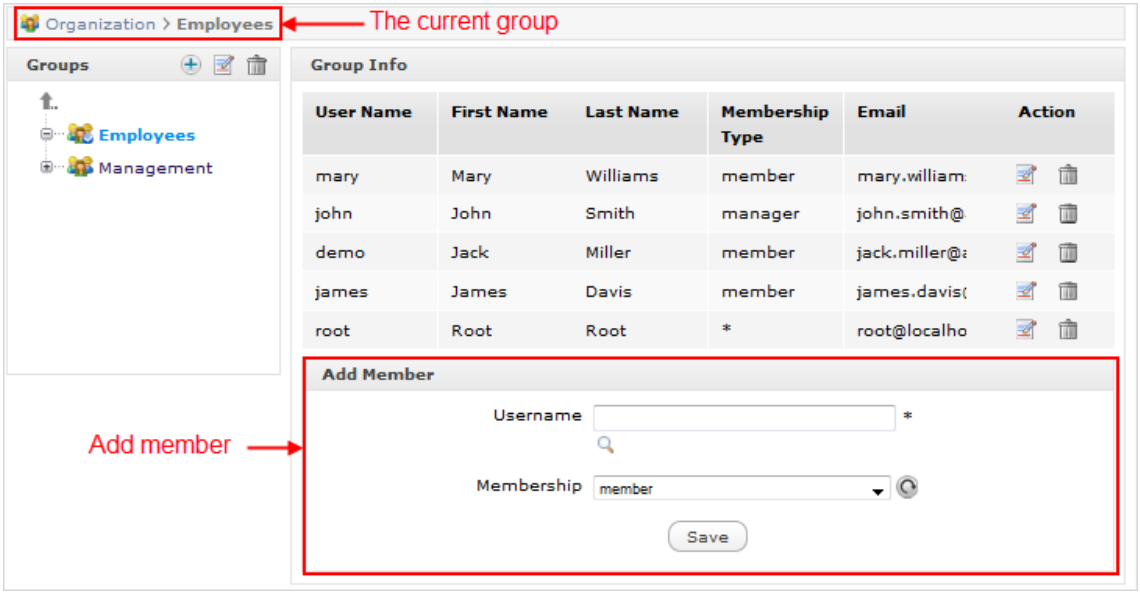
3. Click **OK** in the confirmation message to accept your deletion.

Note

After being deleted, all information related to that group, such as users and navigation, is also deleted. You cannot delete the mandatory groups, including *Platform, Platform/Administration, Platform/Guests, Platform/Users.*

4.5.3.4. Add a user to a group

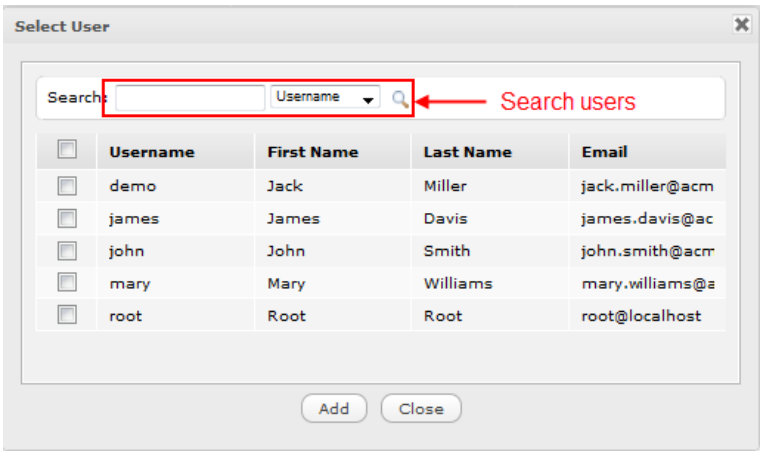
1. Select the group to which you want to add a new user in the left pane.
2. Enter the exact Username of the user that you want to add to the selected group (you can add many usernames separated by commas);



Or, enter at least one character if you are not sure about the exact spelling and do the further followings:

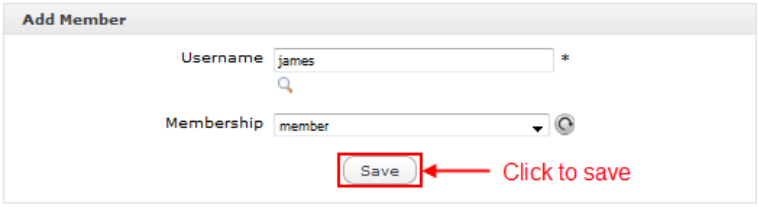
i. Click to search by your entered characters.

After you have clicked , there will be a list of all existing users whose **Usernames** include the entered characters. For example, if you enter 'o', you will get the following result.



ii. Select the checkboxes corresponding to users you want to add to the group.

After clicking **Add**, you will see the complete **Usernames** in the **Add Member** form.



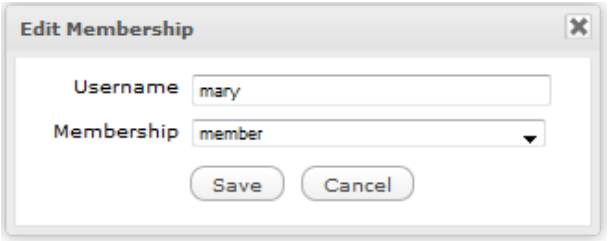
3. Select the membership for the users from the **Membership** list. You can click to update the memberships list in case of any changes.
4. Click **Save** to accept adding the selected users to the specific group with the specified membership type.

Note

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

4.5.3.5. Edit a user membership in a group

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

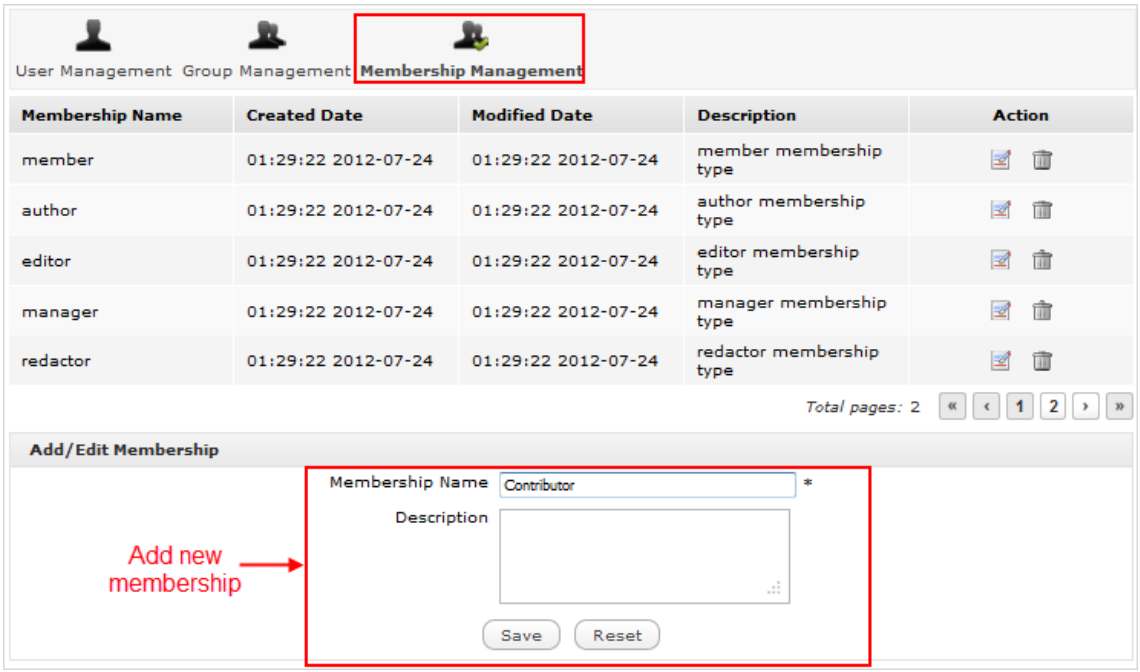


2. Change the membership of the selected user by selecting another value in the **Membership** list.
3. Click **Save** to complete your changes.

4.5.4. Manage memberships

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

By default, eight membership types available in eXo Platform include *Member, Author, Editor, Manager, Redactor, Validator, Webdesigner,* and *Publisher.* The "Manager" has the highest right in a group.



In the following sections you will you learn to Add a new membership type[55], Edit a membership type[55] and Delete a membership type [55].

Add a new membership type

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

Edit a membership type

1. Click corresponding to the membership type you want to edit in the **Action** column. Information about the selected membership type will be updated automatically in the **Add/Edit Membership** form.
2. Make your desired changes on the **Description** field. You cannot change the **Membership Name**.
3. Click **Save** to accept your changes.

Delete a membership type

1. Click in the **Action** column.
2. Click **OK** in the confirmation message to accept your deletion.

See also

- Add a user
- Manage users
- Manage groups

4.6. Manage permissions

- Set permissions on a portal

  Instructions on how to set the Access and Edit permissions on a portal for groups and memberships.
- Set permissions on a page

  Steps to set the Access and Edit permissions on a page for groups and memberships.
- Set Access permission on a category

  Steps to set the Access permission on a category.
- Set Access permission on a portlet

  Steps to set the Access permission on a portlet.

Permissions play an important role in accessing and performing actions in eXo Platform. Depending on these permissions assigned by an administrator, users can gain access to various components and another actions, such as editing portals, pages, or portlets.

Details about permission types and levels can also be found in the Permission section.

See also

- Manage sites
- Manage a sample accessible website
- Manage navigation nodes
- Manage pages
- Manage applications

4.6.1. Set permissions on a portal

You can set the portal permissions (**Access permission** and **Edit permission**) for a specific user via the **Permission Settings** tab.

The **Permission Settings** tab can be opened in some various ways, depending on the following approaches.

For new portals:

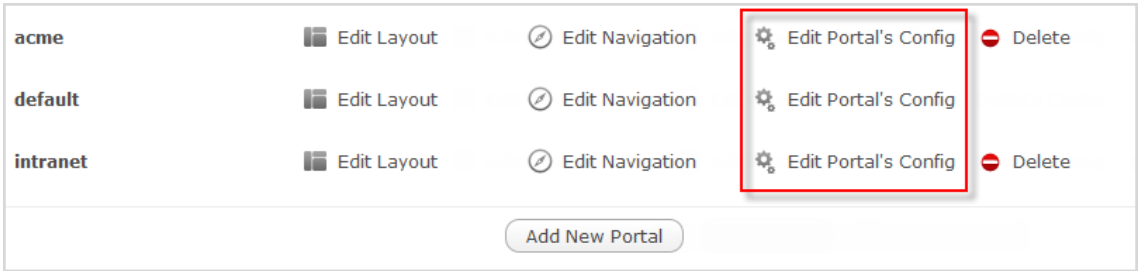
1. Hover your cursor over in the **Administration** bar, then click **Portal** --> **Sites**.

2. Select the **Add New Portal** button to open the **Create New Portal** form.
3. Click the **Permission Settings** tab.

For existing portals:

The first way

1. Hover your cursor over in the **Administration** bar, then click **Portal** --> **Sites**.



2. Select **Edit Portal's Config** --> **Permission Settings** tab.

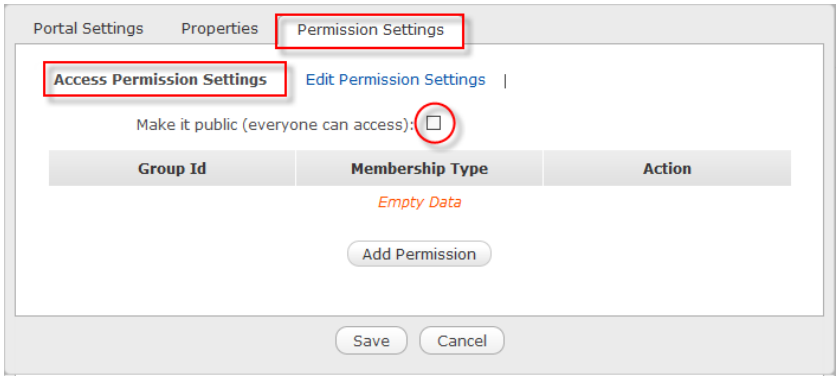
The second way

1. Hover your cursor over **My Sites** on the **Administration** bar, then select your desired portal from the drop-down menu.
2. Select **Edit** --> **Site** --> **Layout** on the **Administration** bar.
3. Click **Site's Config** in the **Edit Inline Composer** window, then select the **Permission Settings** tab.

Access permission

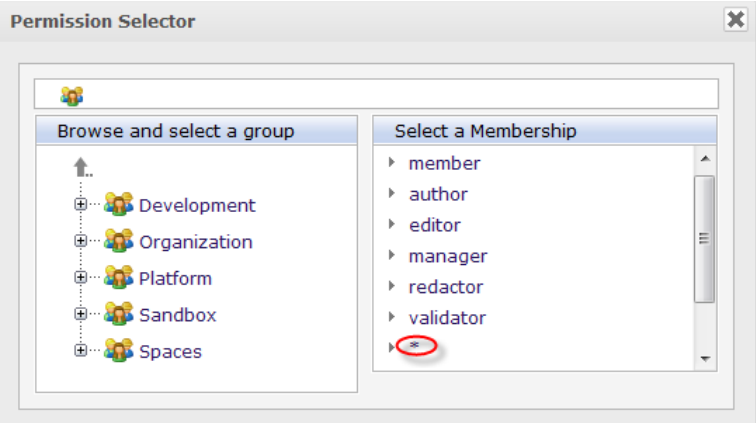
> **Note**
>
> To access a portal, you must belong to one of the groups that have the *Access* permission to that portal.

After entering into the Permission Settings [56] tab, you first need to select the **Access Permission Settings** sub-tab to set the access permissions on a portal.



- If you want to assign the *Access* permission to users in the public mode (without signing in), simply select the **Make it public (everyone can assess)** checkbox.
- If you do not want everyone to access the portal, first deselect the **Make it public (everyone can access)** checkbox, and do the followings:

  1. Click the **Add Permission** button to open the **Select Permission** form.



2. Select one group in the left pane, and one membership type in the right pane. In the list of membership types, the asterisk (*) means that any membership types of the selected group are allowed.
3. Click **Save** to finish your settings.

- After you have selected a membership type, the selected permission is displayed in the *Access* permission list.
- You can select only one group with one membership type at each time. If you want to add more, click the **Add Permission** button and select again.

Edit permission

> **Note**
>
> Only members under the **Editor** group can edit that portal. Access rights can be given to several groups but edit rights can only be given to a group with a membership type. To assign the *Edit* permission to a user, you must add him/her to the editors group of the relevant portal.

After entering into the Permission Settings [56] tab, you first need to select the Edit Permission Settings sub-tab to set the Edit permissions on a portal and do the followings:

1. Click the **Select Permission** button to open the **Permission Selector** form.
2. Select one group in the left pane and one membership type in the right pane. You can select * if you want to assign all available membership types to the selected group.
3. Click **Save** to finish your settings.

4.6.2. Set permissions on a page

To set permissions on a page, you first need to go to the Permission Settings [43] tab via different ways:

Via Edit Page:

1. Hover your cursor over **My Sites** on the **Administration** bar, then select the page you want to configure from the drop-down menu.

   You will be directed to your selected site.
2. Continue hovering your cursor over **Edit** on the **Administration** bar, then select **Page** --> **Layout** from the drop-down menu.
3. Click **View Page Properties** in the **Page Editor** window.
4. Select the **Permission Settings** tab.

Via Page Management:

1. Hover your cursor over on the **Administration** bar, and select **Portal** --> **Pages** to open the **Pages Management** page.
2. Locate the page you want to edit using the **Page Id** column, then click corresponding the page in the **Action** column. You will be taken to the **Page Editor** window.
3. Select the **Permission Settings** tab.

Access permission

> **Note**
>
> To be able to access a page, you have to be in one of the groups that have the *Access* permission to that page.

To assign the *Access* permission on a page, simply follow steps as stated in the Access permission [57] section.

Edit permission

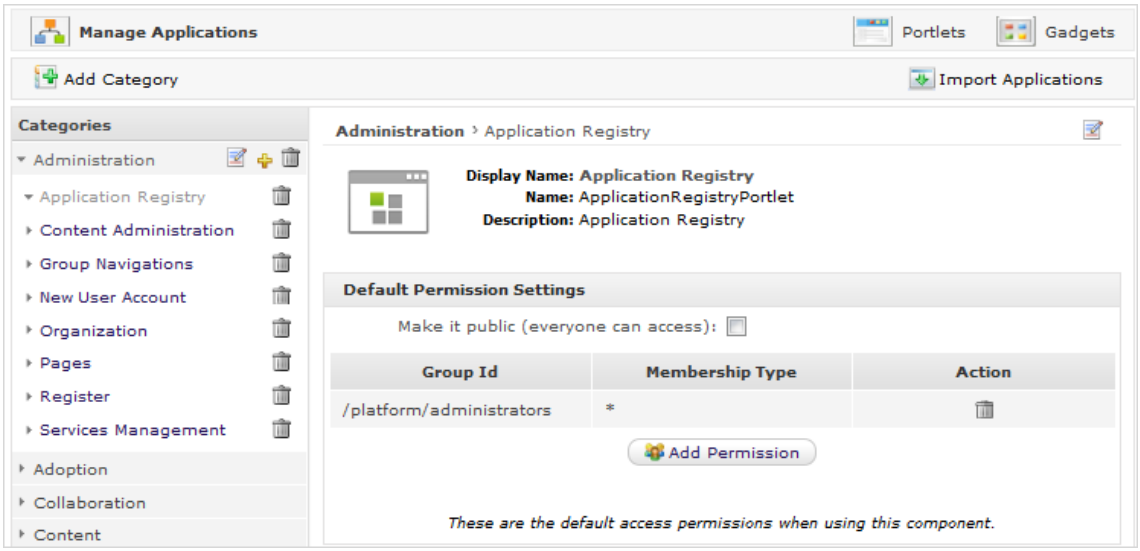
> **Note**
>
> Only users under the page's editors group can edit it. The Access permission can be set for several groups but the *Edit* permission only can be set for one group.

To give users the *Edit* permission, you must add them to the editors group of that page via **Permission Settings** and follow steps as stated in the Edit permission [58] section.

4.6.3. Set Access permission on a category

Setting the *Access* permission on categories allows these categories to be listed when a page is edited to add portlets or widgets.

1. Hover your cursor over in the **Administration** bar, then select **Applications** from the drop-down menu to open the **Manage Applications** page.

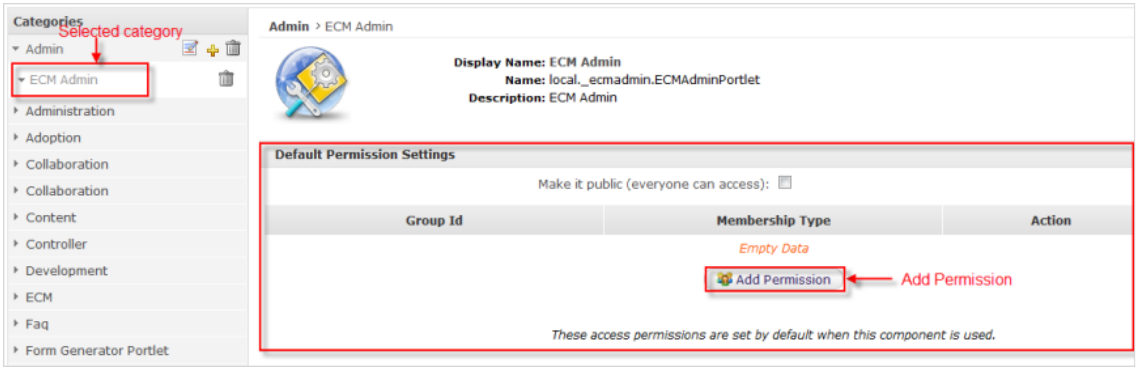


2. Select one category from the list of available categories in the left pane, then click .
3. Select the **Permission Settings** tab.
4. Set the *Access* permission on a category that is similar to the Access permission [57] section.

4.6.4. Set Access permission on a portlet

1. Go to the **Manage Applications** page.
2. Select the category containing the portlet you want to set the *Access* permission, then click the relevant portlet under your selected category.

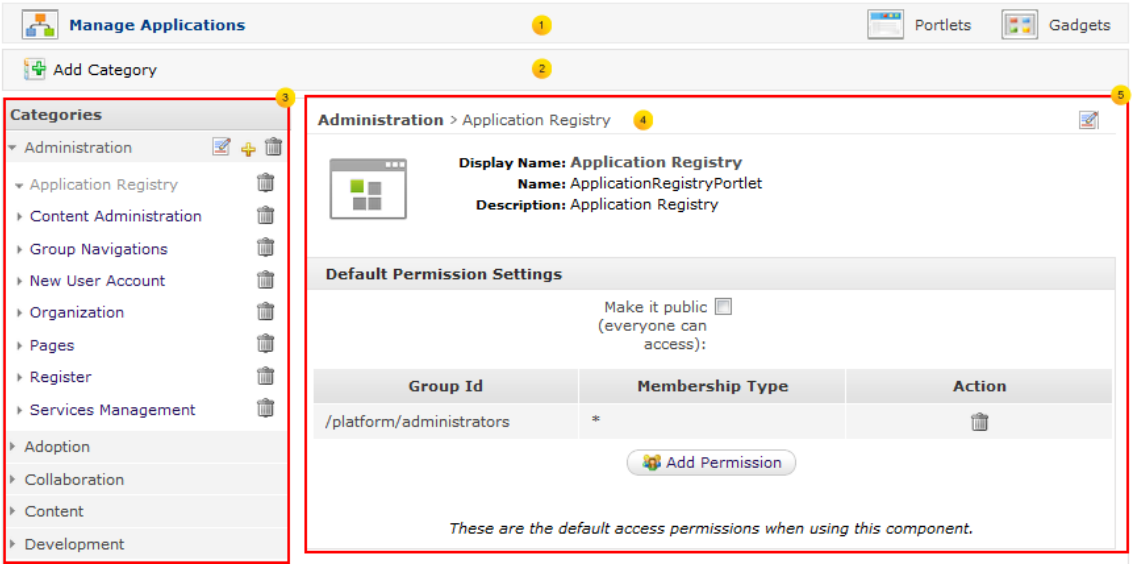
   The selected portlet will be highlighted in grey in the left pane with its detailed information in the right pane.



3. Follow steps stated in the Access permission [57] section to assign access permission on your selected portlet in the **Default Permission Settings** form.

Categories, Portlets and Gadgets Administration

To manage categories, portlets and gadgets in a portal, you first need to go to the **Manage Applications** page by hovering your cursor over on the **Administration** bar, and select **Applications**. The **Manage Applications** page will appear.



Details:

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

Portlets and gadgets are organized into different categories. Each category contains one or several portlets or gadgets. You can also mix portlets and gadgets into one category. By default, all gadgets are placed in the *Gadgets* category.

Here, you can do the following actions:

- Manage categories
- Manage portlets and gadgets
  - Add portlets/gadgets to the Application list
  - Activate the Import Applications function
  - Import portlets and gadgets
  - View/Edit detailed information of a portlet/gadget
  - Edit a specific portlet
  - Add a gadget
  - Add a new gadget from Dashboard
  - Edit a gadget

5.1. Manage categories

5.1.1. Add a new category

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

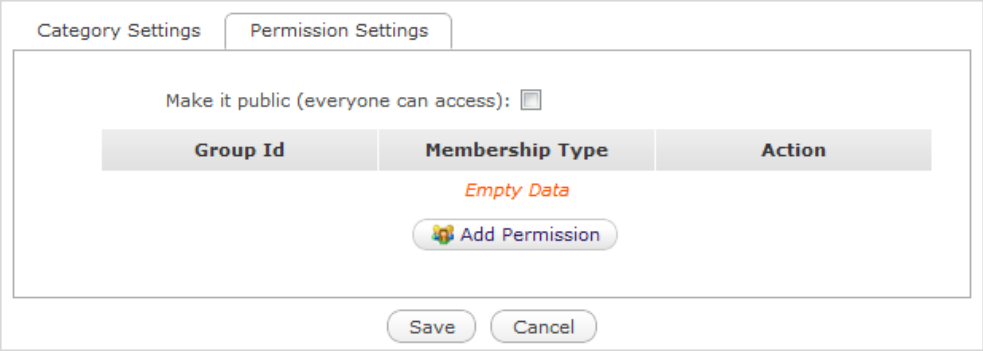
   Details:

   In the **Category Setting** tab:

   Category name
   The category's name that you want to add. This field is required and its length must be between 3 and 30 characters.

   Display name
   The display name of the category and its length must be between 3 and 30 characters.

   Description
   A brief description of the category. Any length from 0 to 255 characters is allowed.
2. Enter values in the **Category Setting** tab.
3. Set the *Access* permission for your category. Accordingly, another users can only view and use portlets in your category to which they have access.



   For more details about how to set the *Access* permission, refer to ???.
4. Click **Save** to accept adding a new category to the categories list. Your newly created category will be added to the list in the left pane.

5.1.2. Edit a Category

1. Click located next to the title bar.
2. Update the category information.
3. Click the **Save** button to apply changes.

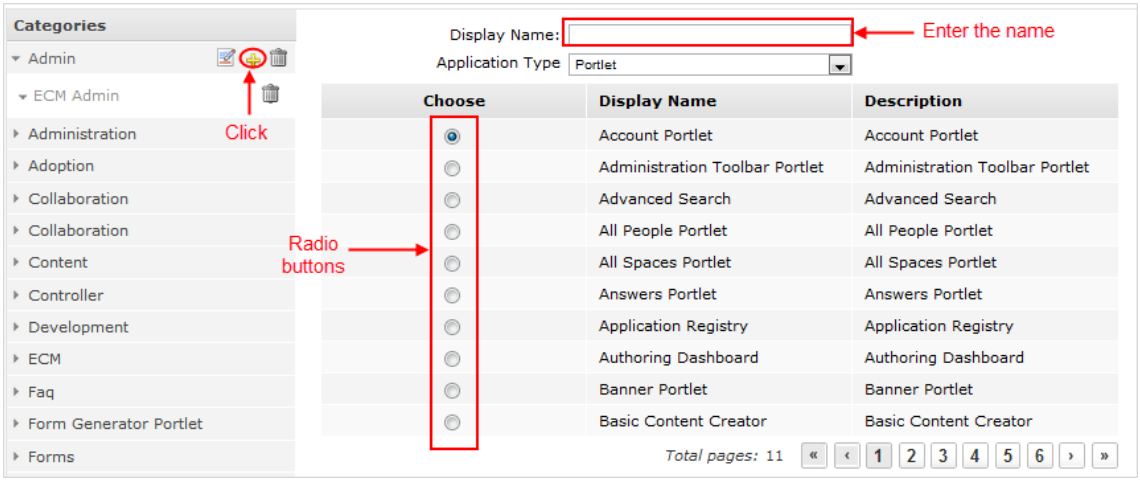
5.1.3. Delete a Category

1. Click located next to the title bar.
2. Click **OK** to accept deleting in the confirmation message.

5.1.4. Add Portlets/Gadgets to a Category

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

1. Click located next to the category name to which you want to add portlets/gadgets.



Display name

The display name of a portlet/gadget.

Application Type

Either Portlet or Gadget.

2. Enter the display name and select an application type.
3. Select a portlet/gadget by checking the radio button.
4. Click **Save** to add the selected portlet/gadget to the category.

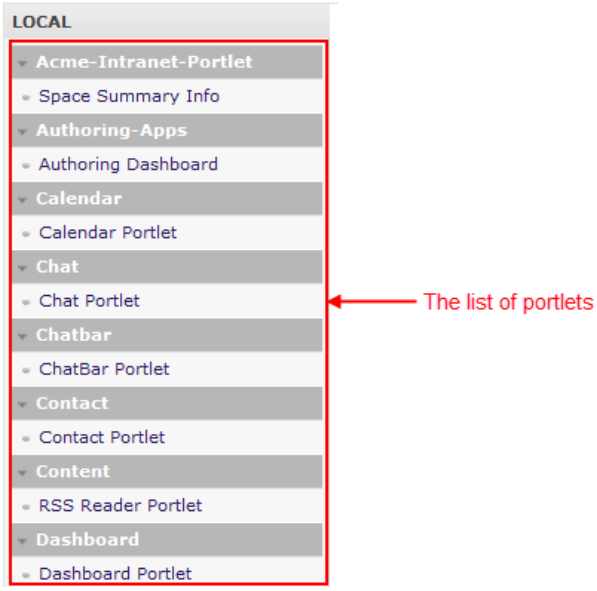
The selected portlet/gadget will be added to the category in the left pane.

5.2. Manage portlets and gadgets

5.2.1. Add portlets/gadgets to the Application list

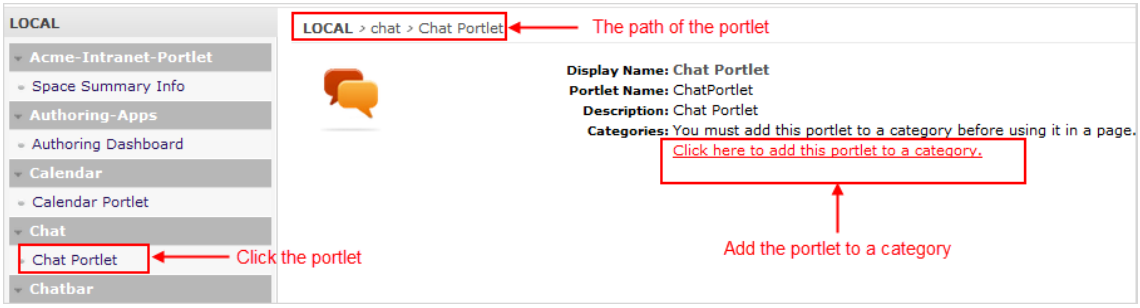
This section shows you how to add a portlet/gadget to the **Application** list on the left pane of the **Manage Application** page.

1. Click **Portlets/Gadgets** on the **Tab** bar to open a list of portlets/gadgets respectively.

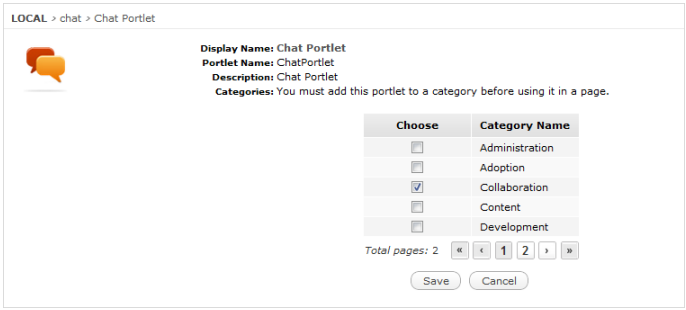


2. Click the portlet/gadget which you want to add to the **Application** list.

   The information of the portlet/gadget is displayed.



3. Click the **Click here to add this portlet to a category** link to open a form which allows you to select a category for the portlet.



4. Click **Save** to accept adding the portlet/gadget to the **Application** list.

> **Note**
>
> In case, the portlet/gadget was already added to the **Application** list, there will be no the **Click here to add this portlet to a category** link.

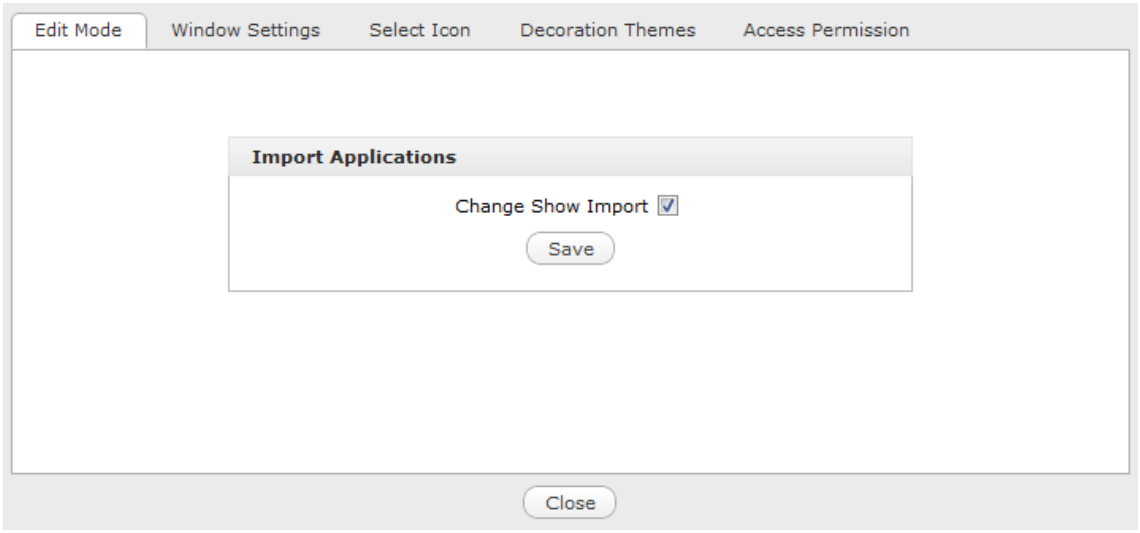
5.2.2. Activate the Import Applications function

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

By default, the **Import Applications** function is hidden. To activate it, you can do as follows:

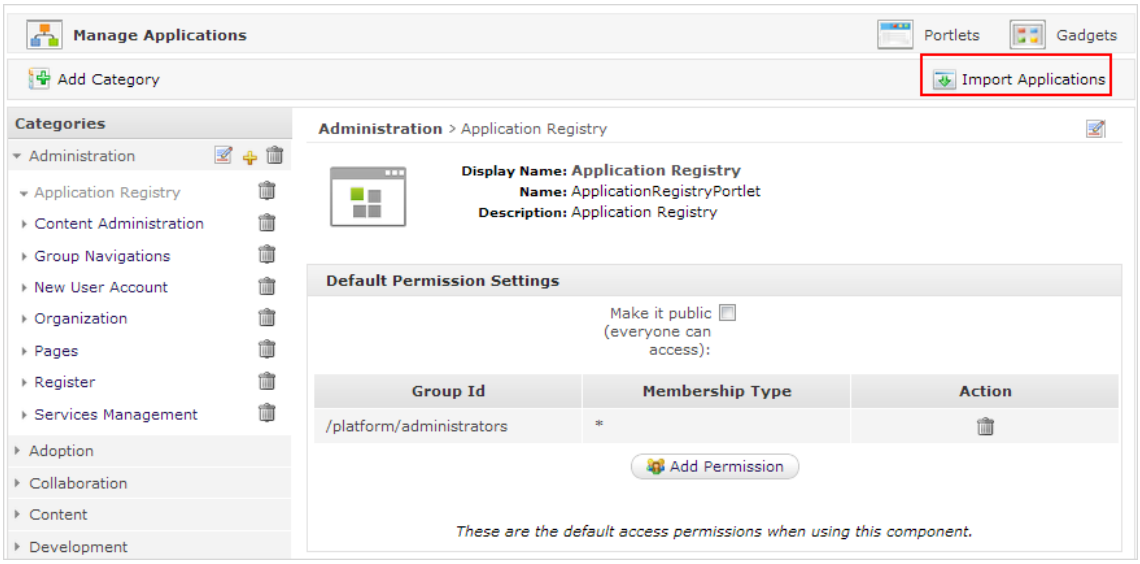
1. Go to the **Manage Applications page [61]** --> **Edit** --> **Page** --> **Layout** on the **Administration** bar.
2. Hover your cursor over the **Application Registry** portlet, then click at the upper left corner of that portlet.

   The **Edit** form will be displayed.



3. Tick the **Change Show Import** checkbox, then click **Save** to accept the changes.
4. Click **Close** to close the **Edit** form, then click to quit the **Page Editor** page.

   The **Import Applications** button is displayed on the **Manage Applications** page.



5.2.3. Import portlets and gadgets

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

1. Click Import Applications at the right corner on the **Action** bar.
2. Click **OK** in the confirmation message to accept importing portlets and gadgets automatically.

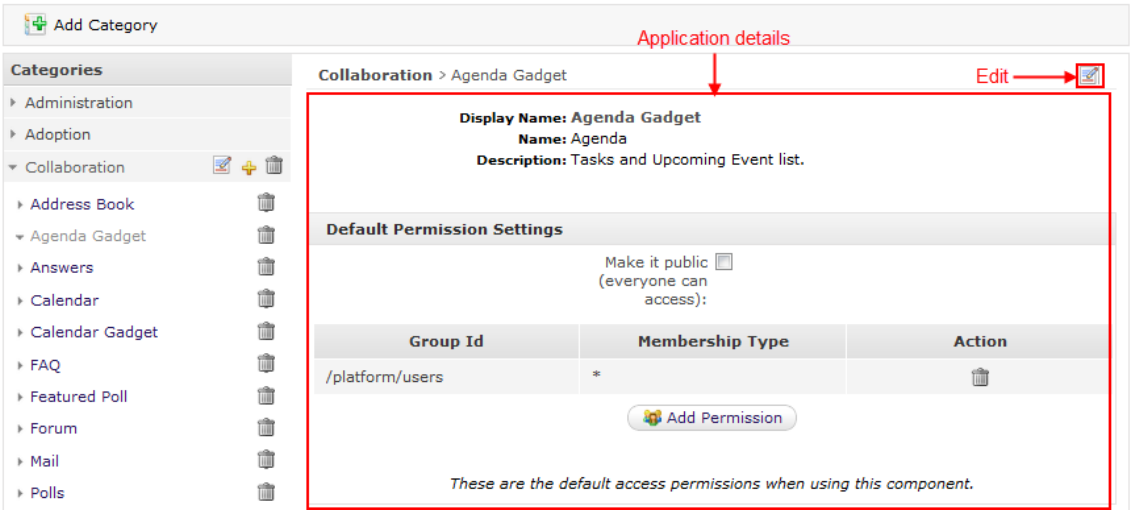
   All portlets and gadgets of all categories will be imported and listed on the left pane.

Note

You can see Import Applications only when the Import Applications function is activated.

5.2.4. View/Edit detailed information of a portlet/gadget

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



Left pane

All portlets and gadgets grouped by categories.

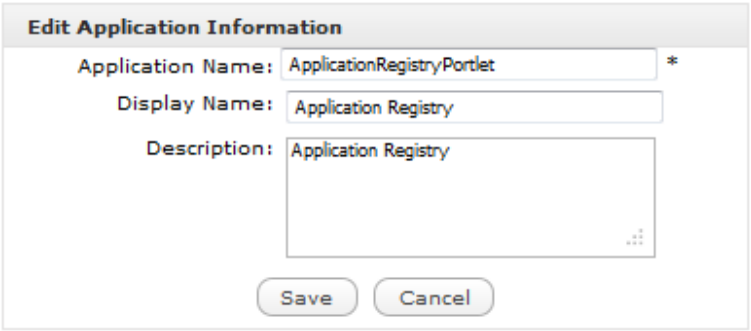
Right pane

Details of a portlet: **Name, Display Name, Description**.

Edit a portlet

1. Click on the top corner of right pane.

   The **Edit Application Information** form will appear.



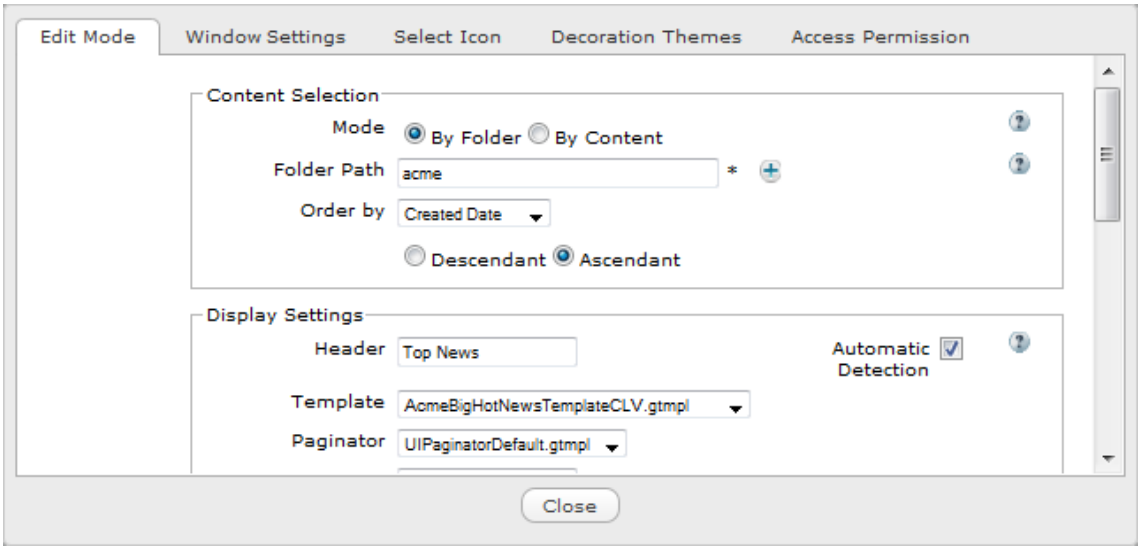
2. Make changes on these fields, except **Application Name**.

5.2.5. Edit a specific portlet

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

1. Define your desired portlet to check if this portlet has been existing in the portal or page. If not, drag and drop it from **Edit Inline Composer** to the main portal body while editing the portal's layout, or from **Page Editor** to the main page body in the Step 3 while creating a page [40] and/or while editing a page.
2. Hover your cursor over your desired portlet, then click at the upper left corner of that portlet.

   The **Edit** form will be displayed.



Normally, a portlet has four tabs: **Window Settings, Select Icon, Decoration Themes** and **Access Permission.** However, some portlets may also have **Edit Mode** and **Preferences** tabs. For example, IFrame and Dashboard portlets have the **Edit Mode** tab where administrators can define the interface details.

3. Make changes on fields in the various tabs.

- The **Window Settings** tab allows you to change values related to settings of your selected portlet.

  Details:

Field	Description
Display Name	The display name of portlet which cannot be changed.
Window Title	The portlet title with the length between 3 and 60 characters.
Width	The portlet's vertical size. The value of this field must be in numeric format.
Height	The portlet's horizontal size. The value of this field must be in numeric format.
Show Info Bar	The option enables the information bar to be shown or hidden. If the **Show Info Bar** checkbox is not selected, portlet mode and window state will not be displayed in that portlet.
Show Portlet Mode	The option enables the portlet mode to be shown or hidden.
Show Window State	The option enables the portlet's window state to be shown or not.
Description	The brief information of the portlet. The length must be between 0 and 255 characters.

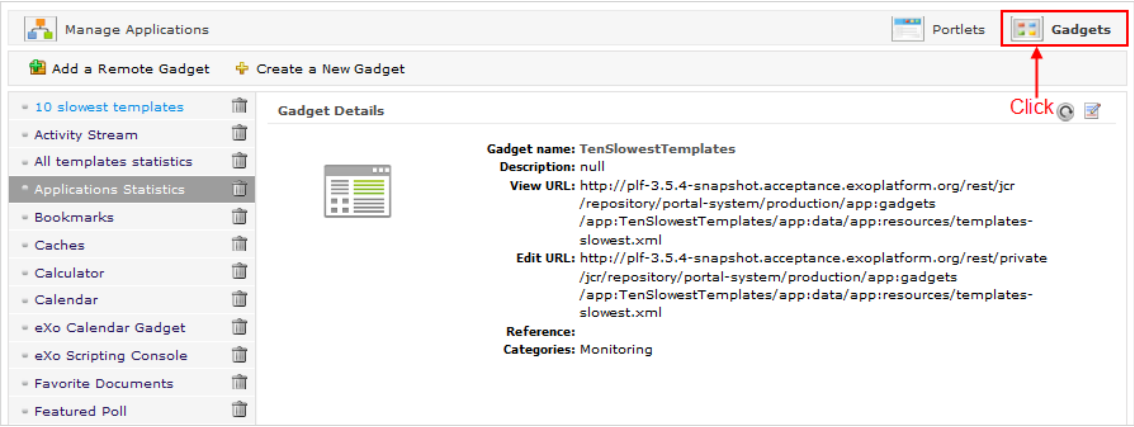
- The **Select Icon** tab allows you to select an icon for the portlet. By clicking **Get Default,** you do not have to select any icon from the list, the suitable icon will be got automatically.
- The **Decoration Themes** tab allows you to select a theme for the portlet from the themes list. By clicking **Get Default,** you do not have to choose any theme, it will be automatically set.
- The **Access Permission** tab allows you to set the access permission on the portlet. The portlet can be made public to everyone or restricted to specific groups.

> **Note**
>
> See the Set Access permission on a portlet section for details on how to assign the access permission on a portlet.

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

5.2.6. Add a gadget

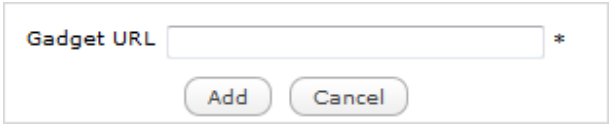
To add a gadget, you first need to turn into the **Gadget** page by selecting **Gadget** on the tab bar of the **Manage Applications** page.



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

Add a remote gadget

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



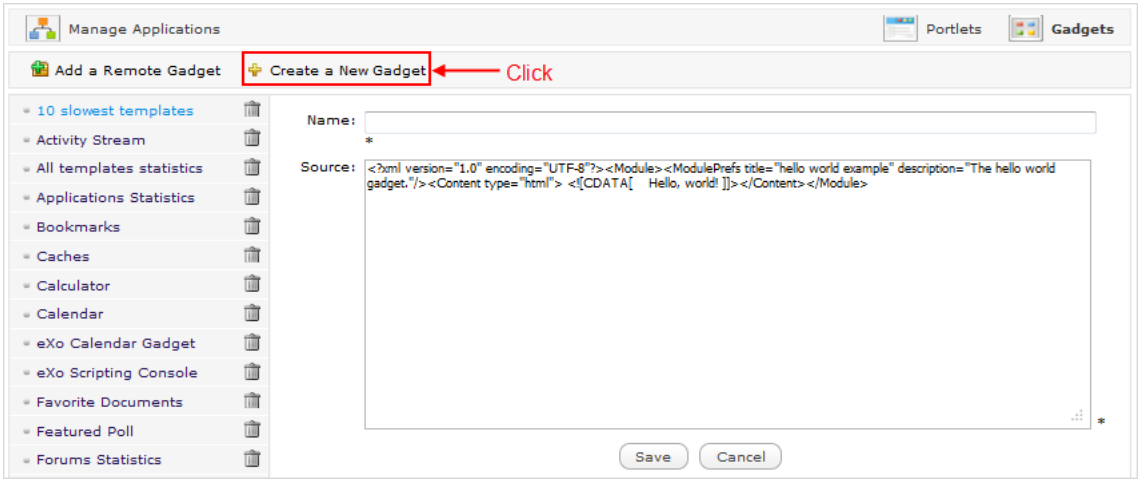
3. Click **Add** to accept your inputted URL.

   The selected gadget will be added to the gadgets list in the left pane with its details in the right pane.

Create a new gadget

1. Click the **Create a New Gadget** link.
2. Enter values in the form.

   For example:



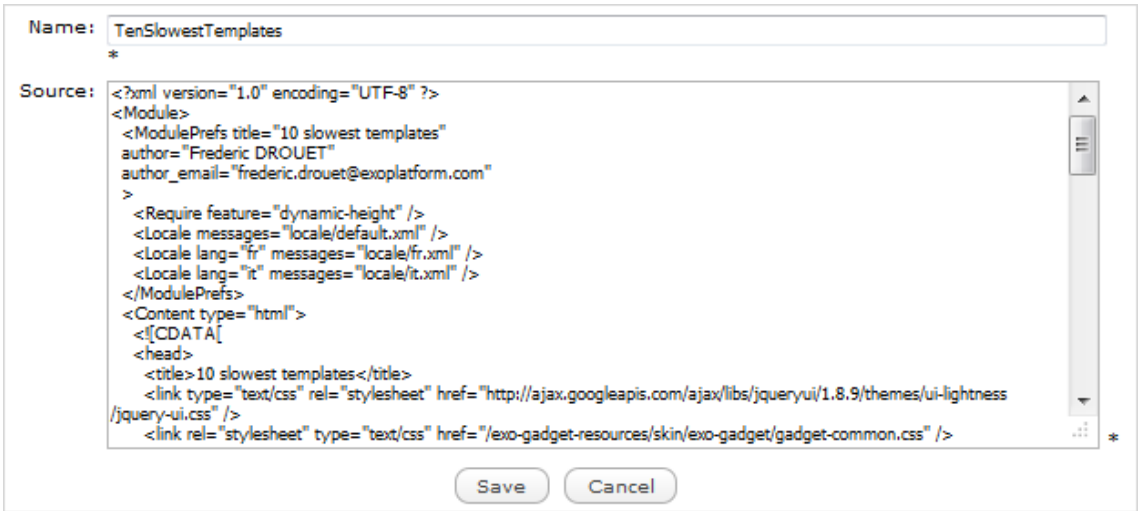
3. Click **Save** to accept creating your new gadget.

> **Note**
>
> To add the newly added remote gadget to a specific category, simply click the "Click here to add into categories" link at the bottom of the right pane. The table listing all categories will appear that allows you to select your desired category.
>
> To update information of the added gadget, simply click to refresh information.

- You can delete a local gadget using corresponding to each gadget in the left gadgets list.

5.2.7. Add a new gadget from Dashboard

See the Add more external gadgets from Dashboard [25] section for instructions on how to add new gadgets from the dashboard.

5.2.8. Edit a gadget

Click located at the header of the **Gadget Details** page to display the following window.