User Guide

A guide to the basic usage of the Site Publisher extension for JBoss Enterprise Portal Platform

by eXo Platform Documentation Team

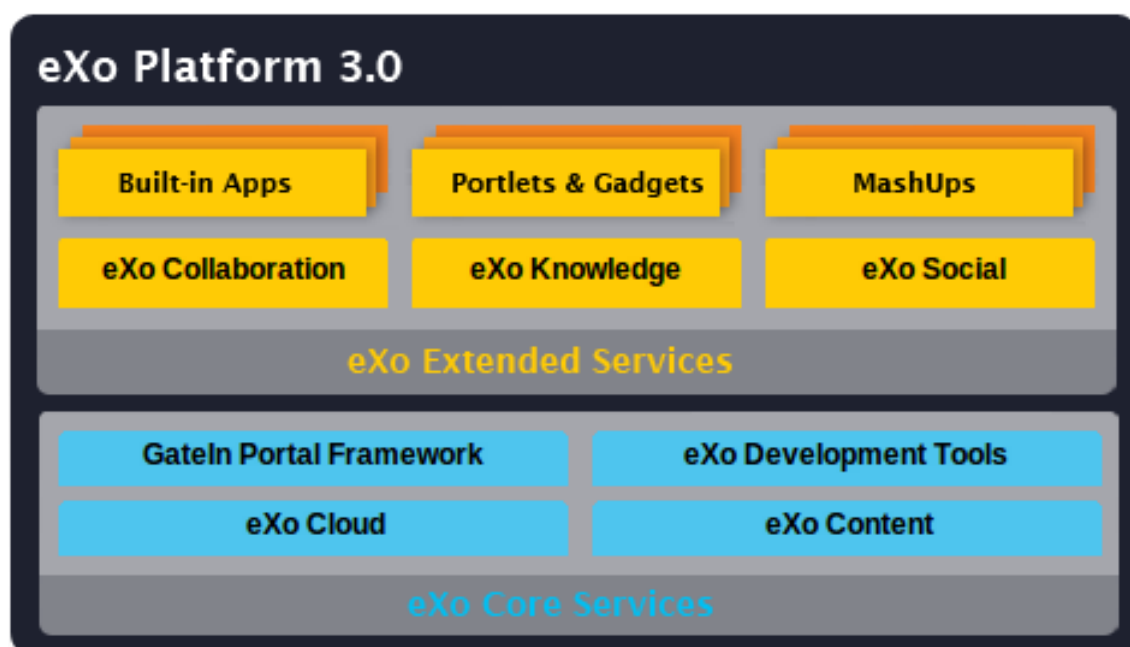edited by Scott Mumford (Red Hat)

Preface

Preamble

1.1. Overview

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

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

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

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

1.2. Why Use Site Publisher

If you are looking for a powerful tool and strategies in managing website and contents, eXo Content is what you need. eXo Content is designed to provide webmasters who manage websites the

way to maintain, control, modify and reassemble the content of a web-page easily and effectively. All components of your website can be organized, reconstructed easily, which helps you keep your website under the control. eXo Content really brings interesting experience for all users and changes their way of thinking about website. The followings are key features of eXo Content:

Website Creation

Fast Setup:
> Setup a new site in just a few clicks with an intuitive user interface and template features.

Navigate, Preview and Publish Content:
> Navigate through page content in either a single content viewer or the list content display, quickly preview page content or work on new content in draft mode and publish at anytime.

Templates:
> Create websites from existing templates and themes, or create new templates with a consistent look-and-feel across a single site.

In-Site Edition
> The integrated rich text editor allows non-technical users to edit the pages they are in charge of in an intuitive way.

Web Content Organization

Web-Based Administration:
> Use a web browser to manage sites remotely, no local administration software is required.

Manage Multiple Websites:
> Manage and control every site in one place.

Media Library:
> Upload media to the library, publish, reuse and update all available media content across multiple websites.

Content Search:
> Search content and documents using categorization and tag features.

Broken Link Detection:
> Know how many broken links are present and how many are functional with ease.

Versioning and Rollback:
> Easily rollback a website's content with automatic versioning.

SEO and Friendly URLs:
> Search Engine Optimization (SEO) is simplified for editing meta tags and more. Content has its own specific URL for easier bookmarking and improved SEO.

Configuration for Deployment on Web Farms:
> Advanced deployment rule for scalable, three-tier web application architecture with partitioned replicated deployment.

Capture and Manage Documents

Kofax Plugin:
> Collect paper documents, forms, invoices and other unstructured documents and convert into accurate and retrievable information, stored in the eXo JCR.

Access Control List:
> Access Control List: Validate the current session's permissions to add nodes, set properties, remove or retrieve items. Define actions to launch the next step in a process, or to invoke any "coded" action required.

Workflow:
> Specify processes for document collaboration and validation.

Record Management:
> Track the status of content completion and control document storage lifecycles.

Store and Access Documents

JCR:
> eXo JCR allows applications to access or manage files independent of their location, and also provides advanced features such as unified access control, versioning, indexing and more.

Automatic Backup:
> Define and automate tasks to save documents as required.

Web Interface:
> Access documents in an intuitive and user-friendly web interface.

Microsoft and OpenOffice Plug-ins:
> Microsoft and OpenOffice plug-ins give users the freedom to work on documents in their preferred document editing program.

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

1.3. About This Document

The intended reader of this user guide are users using eXo Content. This guideal will explain all the basic and advanced features that eXo Content provides in managing websites and site

content. It gives in-depth examples and easy explanations of eXo Platform technology that allows the webmasters to create and manage a very fast and powerful website.

With this guide you will:

- learn the basic terminologies used in eXo Content.

- know how to create, manage and publish Site content.

- know how to manage Web pages, set up a website, etc.

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

- **root/ gtn**: This account is for users as Administrators who have the highest right on the platform.

- **mary/ gtn**: This account is for a publisher who can write contents but also can create new pages or edit them in the current site.

1.4. References and Related Sources

Information

- *eXo Home Page* [http://www.exoplatform.com/]

- *eXo Wiki* [http://wiki.exoplatform.com/xwiki/bin/view/Main/WebHome/]

Support

- *Forums* [http://forums.exoplatform.org/]

- *FAQs* [http://faq.exoplatform.org/index.html]

Downloads

- *eXo Content* [http://www.exoplatform.com/company/public/website/platform/exo-core-services/exo-content]

- *eXo Development Tools* [http://www.exoplatform.com/company/public/website/platform/exo-core-services/exo-development-tools]

- *Gatein Portal Framework* []

- *eXo Collaboration* [http://www.exoplatform.com/company/public/website/platform/exo-extended-services/exo-collaboration]

- *eXo Knowledge* [http://www.exoplatform.com/company/public/website/platform/exo-extended-services/exo-knowledge]

- *eXo Social* [http://www.exoplatform.com/company/public/website/platform/exo-extended-services/exo-social]

Resource Center

- *Video demos, tutorials, webinar archives, features and benefits tables and more* [http://www.exoplatform.com/company/public/website/resource-center]

Overall Introduction

2.1. exo Content

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

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

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

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

2.2. Site Content Structure

Creating a site is a quick process, but deciding what content to put in the site and how to organize it will take a lot of time. Thus, to mange a site more easily and more effectively, a site always has a specific structure as follows:
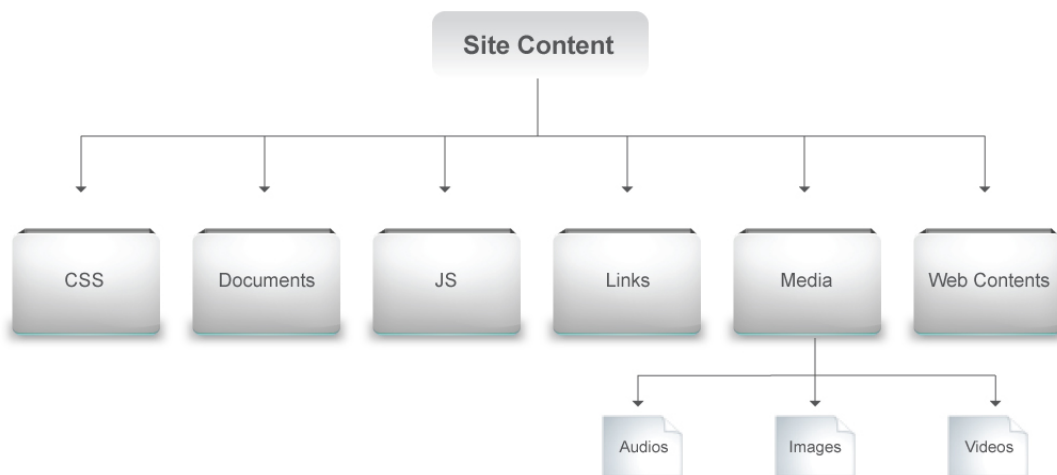
The Site Content are stored in collaboration workspaces of Java Content Repository (JCR).

Details:

CSS

This file is used to define the presentation of your entire site such as: font, color, size, etc.

Documents:

All documents, which are used in a site will be stored in this folder.

JS

A programming script used on the site. This file is used to make a web page more animate and dynamic in terms of graphics and navigation.

Links:

This folder stores all links used in the site.

Media:

This folder includes three sub folders:

Audios:

Store all sound files used in a site.

images:

Store all images, pictures used in a site.

videos:

Store all video files used in a site.

Web content:

This folder is used to store the documents which present main content (texts images, hyperlinks, audios and videos) of the site.

2.3. Web Content

2.3.1. Web Content

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

2.3.2. Web Content Structure

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

Main content:
    It contains all key content such as: texts, images, links, tables,etc.

Illustration:
    It contains an image that is used as an illustration for the content. Additionally, a summary also can be added to come with this image.

default.css:
    It contains CSS data which is used to present the web content such as: layout, font, color, and more.

default.js:
    It contains JS data which is used to make web content more animating and dynamic.

2.4. Terminologies

2.4.1. Repository

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

- A place where data is stored

- A place where specifically digital data are stored

- A place where multiple databases or files are located for distribution over a network

- A computer location that is directly accessible to the user without having to travel across a network

- A place where anything is stored for probable re-usage

- A place to store digital data

2.4.2. Workspace

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

System workspace:
    is used to reserve "system folders"

Backup workspace:
    The backup process depends on the published content timestamps, each published document has a duration for which it can be published and when it exceeds the timestamps, it will be automatically archived to the backup database.

Collaboration workspace:
    Allows legal users to validate and manage documents.

2.4.3. Drive

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

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

- a configured path from where the user will start when browsing the drive

- a set of allowed views that, for example, will allow to limit the available actions (such as the edition or creation of content while being in the drive)

- a set of permissions to limit the access (and view) of the drive to a limited number of people

- a set of options to describe the behavior of the drive when users browse it

2.4.4. Node

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

A node can be thought of as a logical placeholder for data. It is a memory block which contains some data unit, and optionally a reference to some other data, which may be another node that

contains other data. By linking one node with other interlinked nodes, very large and complex data structure can be formed.

2.4.5. Version

Versioning means that at any given time the node's state can be saved for possible future recovery and the action of saving called 'checking in'. A workspace may contain both versionable and non-versionable nodes. A node is versionable if it has been assigned a mixin type mixin: versionable; otherwise, it is a nonversionable node. A version exists as a part of a version history graph that describes the predecessor/successor relations among versions of a particular versionable node.
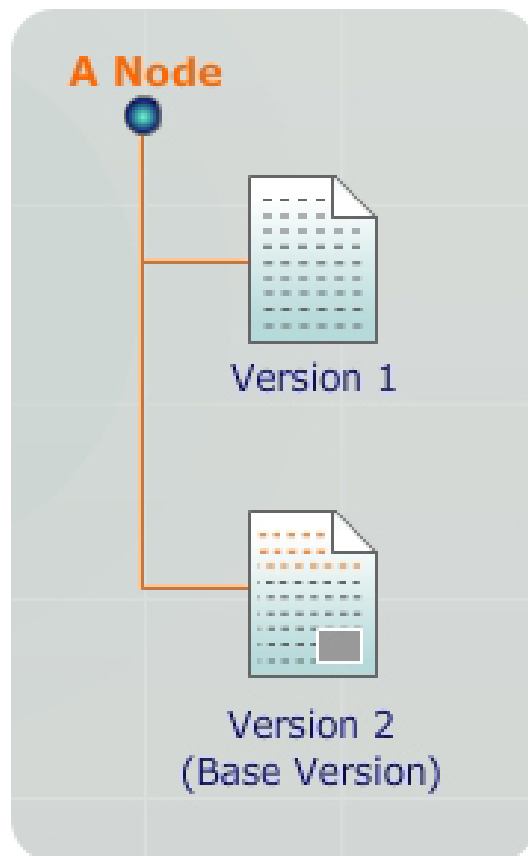
Software versioning is the process of assigning either unique version names or unique version numbers to unique states of computer software. Within a given version number category (major, minor), these numbers are generally assigned in increasing order and correspond to new developments in the software. At a fine-grained level, revision control is often used for keeping track of incrementally different versions of electronic information, whether or not this information is actually computer software.

2.4.6. WebDAV

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

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

2.4.7. Podcast

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

2.4.8. File Plan

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

- Describe the kinds of items the organization acknowledges to be records.

- Describe what broader category of records that the items belong to.

- Indicate where records are stored.

- Describe retention periods for records.

- Delineate who is responsible for managing the various types of records.

2.4.9. Symlink

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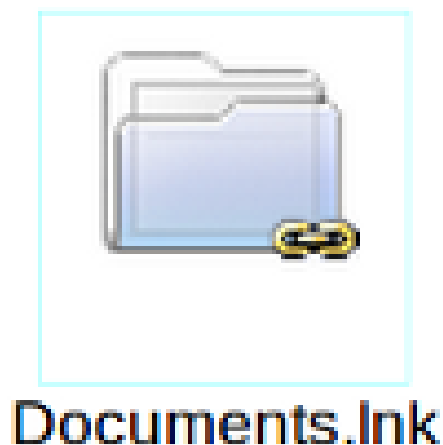
Get Started

3.1. Account

3.1.1. Register an account

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

Procedure 3.1.

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

    The anonymous homepage will appear:

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

(*) required

The Account Setting information includes:

Table 3.1.

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

3. Input values for the fields in this form.

4. Click   the

    icon to search and check if the inputted user name is available or not.

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

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

- User name is existing or invalid.

- Password has less than 6 characters.

- Password and Confirm Password are not the same.

- Email Address has invalid format.

- Required fields are empty.

After adding a new account, contact with the administrator to get the confirmation.
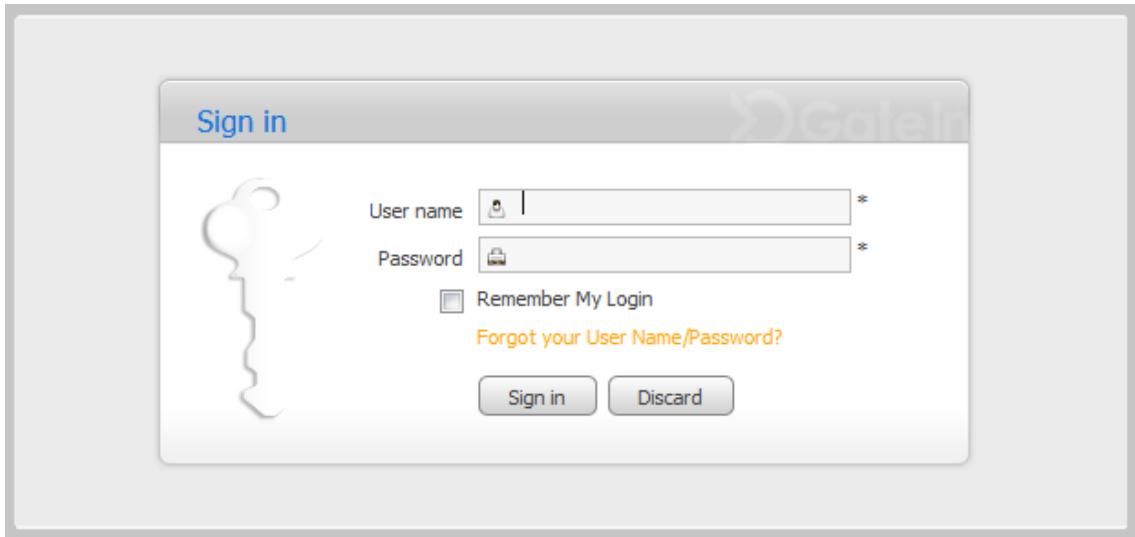
> **i** **Email**
>
> You should enter your email address exactly because when you forget username or password, you can recover it by using this email address.

3.1.2. Sign In

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

Procedure 3.2. Sign in

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

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

3. Input your registered User name and Password.

4. Click Sign in to accept, or Discard to exit from the Sign in form.

Table 3.2. Options

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

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

To login again, enter User Name and Password again.

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

3.1.3. Sign Out

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

To sign out, click the Logout link on the right access banner:
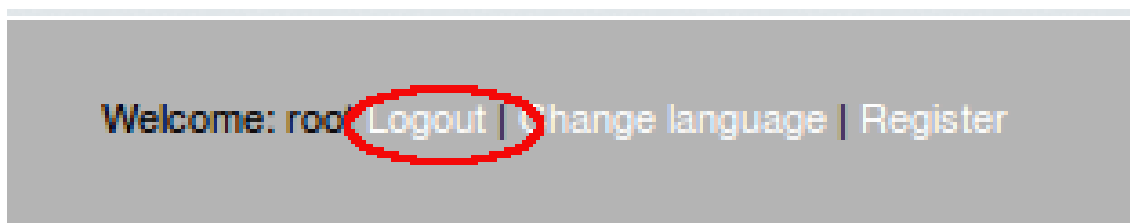
or click eXo | Sign out from the menu:
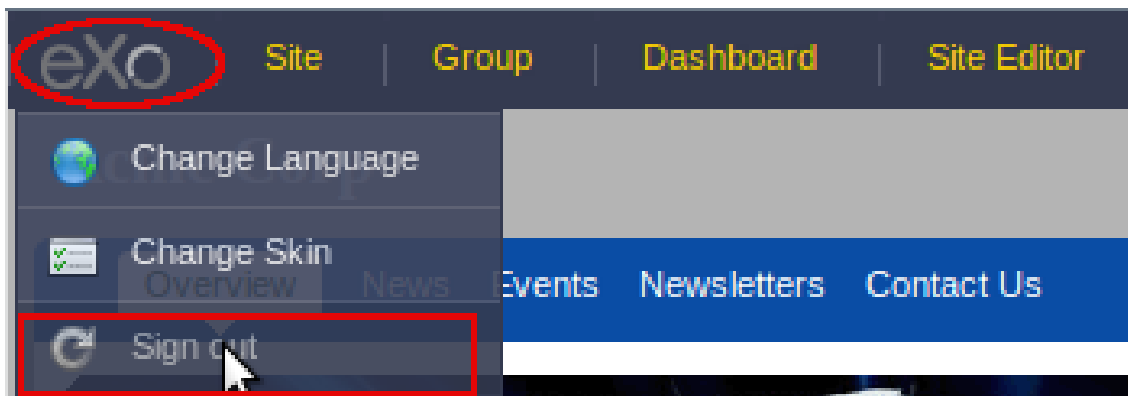
3.1.4. Retrieve user name/password

If you forget your account or password, you can recover them by doing as follows:

Procedure 3.3.

1. Click the link **Forgot your User Name/Password?** in the Sign in form.

    This form offers two options:

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

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

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

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

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

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

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

    Once information has been sent, you will receive an email with your User name/ Password in your email address that you registered.
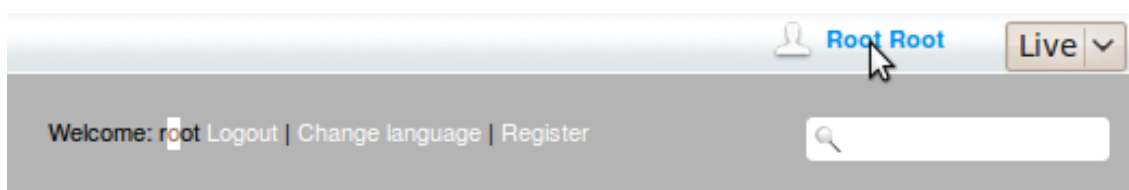
    • If you forget User Name: when a username is retrieved, your old username is restored and can be reused and a new password is also sent to your email with the old username.

    • If you forget old password: a new password will be set (as temporary, then you will be directed to change the password for the next time you sign in).

3.1.5. Change Account Information
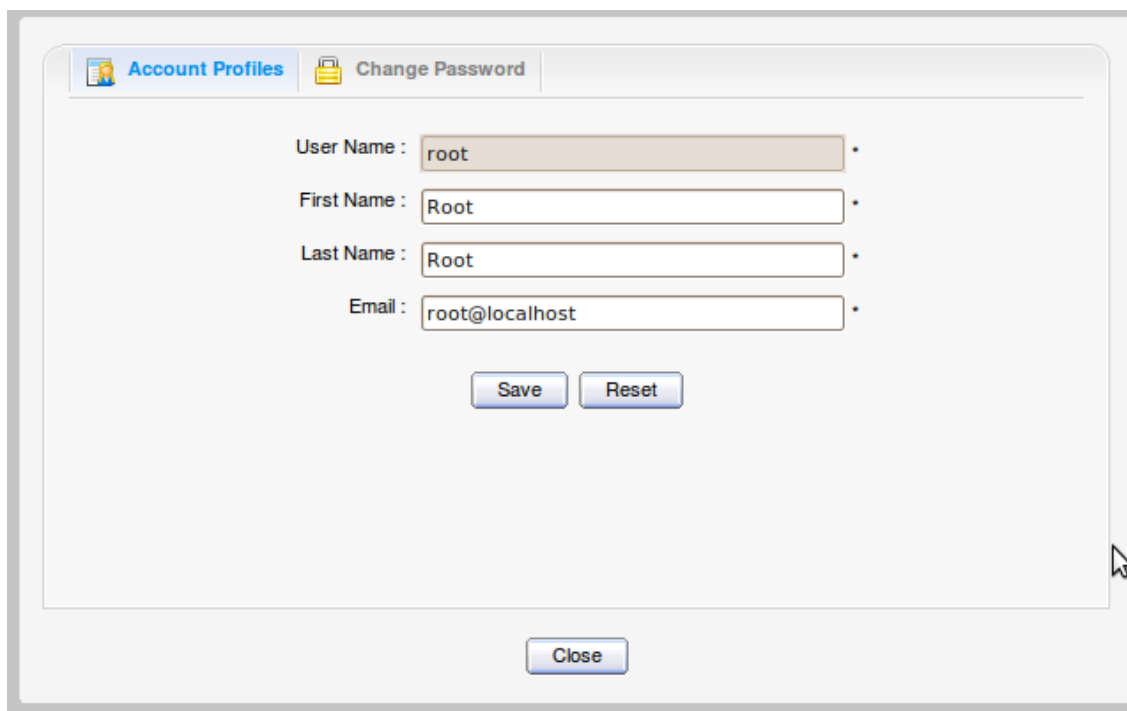
The function enables you change your account information, such as your profile and password.

Procedure 3.4.

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

The Account Profiles tab will appear:

Procedure 3.5. To Change Account Profiles
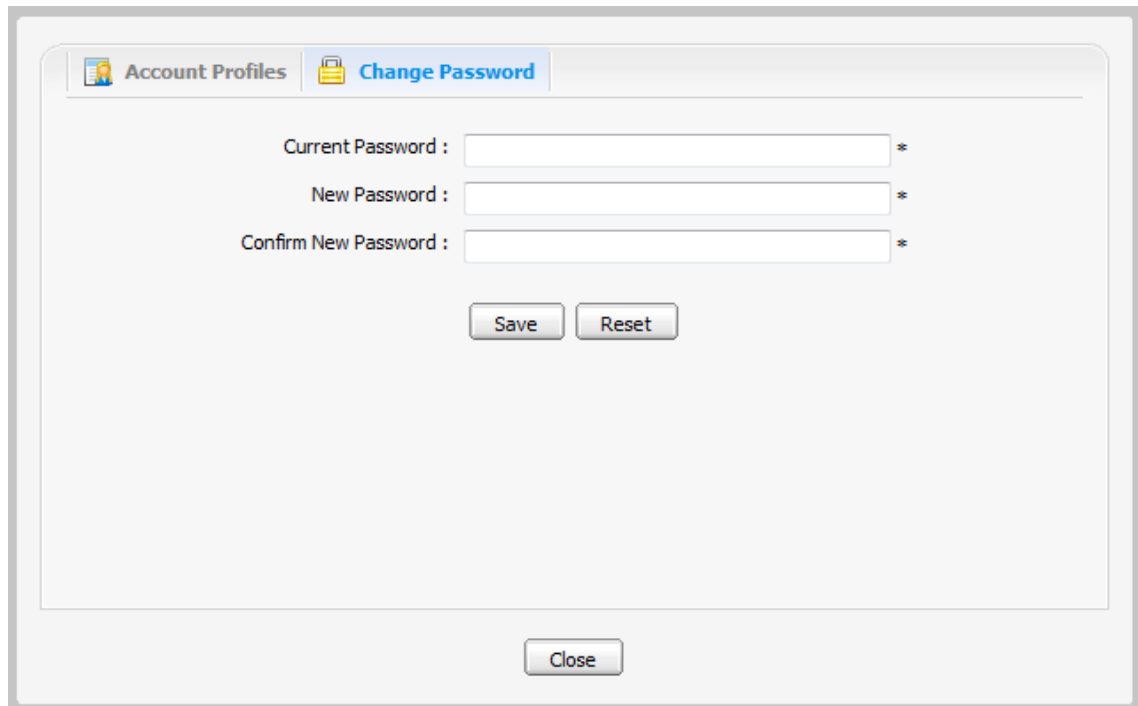
1. Select the Account Profiles tab.

    This tab displays your current basic information.

2. Change your First Name, Last Name and Email. You cannot change your User Name.

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

Procedure 3.6. To change your Password

1. Select the Change Password tab.

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

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

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

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

3.2. Change The Display Language

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

1. User's language

2. Browser's language

3. Portal 's language.

Thus, to display your preferred language, you should pay attention to this order to change the language type appropriately.

Procedure 3.7.

1. Move the mouse on eXo | Change Language on the top left corner of the portal:
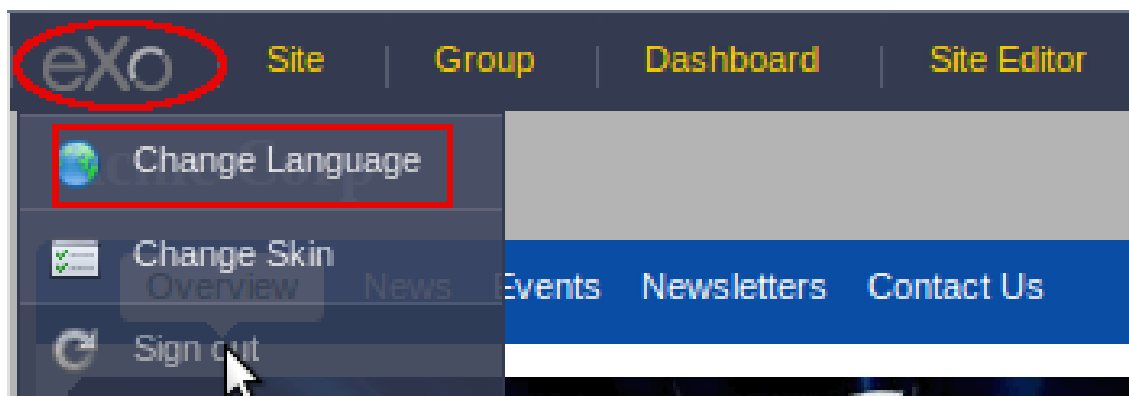
The Interface Language Setting form appears:

2. Select the another language in the list. The currently selected language will be marked with the

    ✓

    icon.

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

3.3. Change the skin of the current site

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

Procedure 3.8.

1. Move the cursor to eXo | Change Skin item in the drop-down menu:
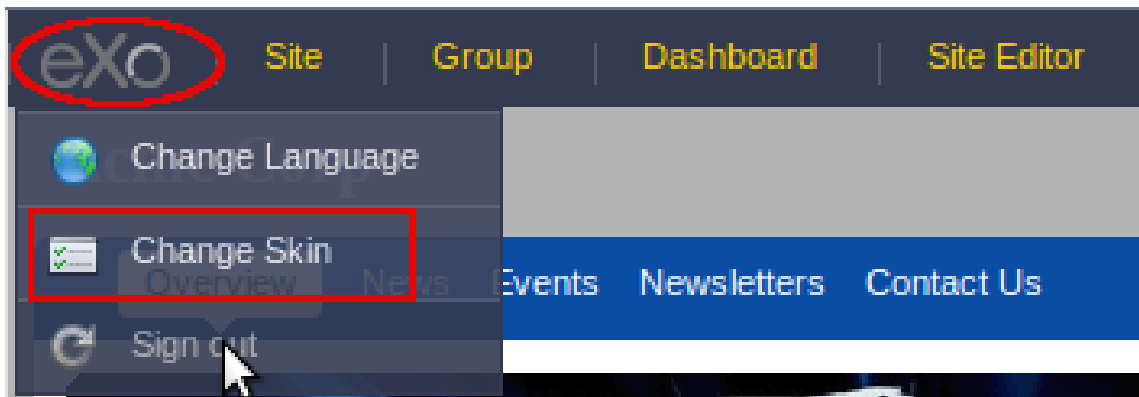
    The **Skin Setting** form appears.
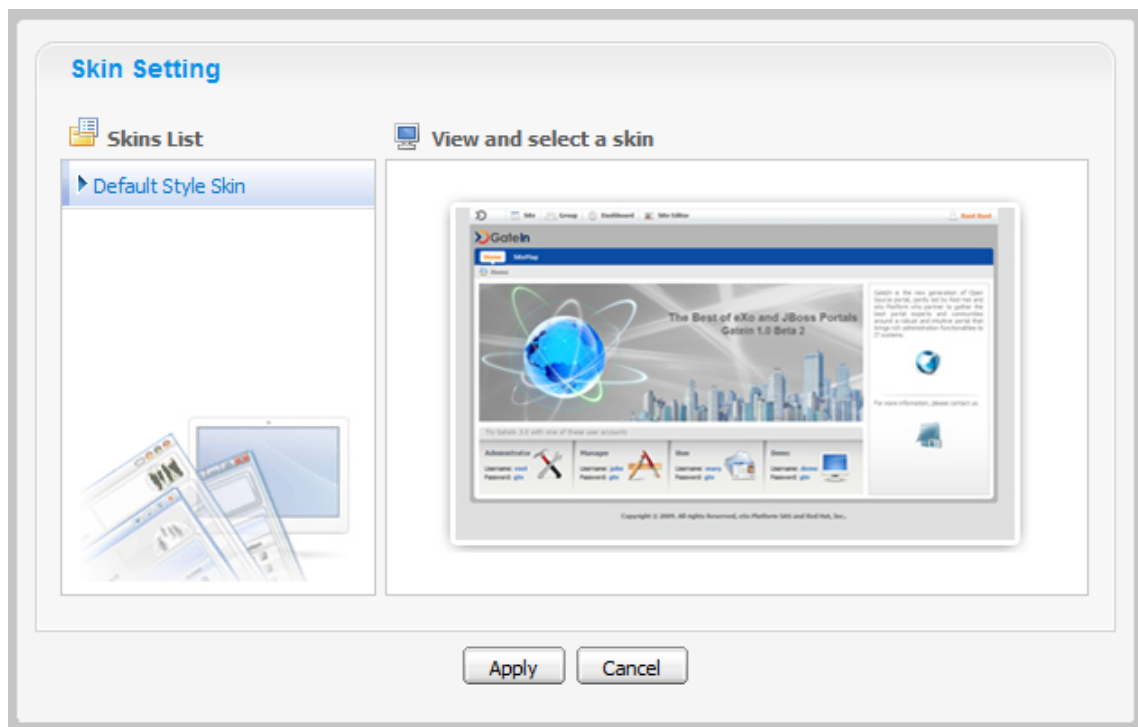
2. Select the skin you want by clicking its name.

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

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

Basic Actions

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

4.1. View a site

In eXo Content, we use the 'Website' term which is equivalent to the 'Portal' term. So, viewing a portal means viewing a website. You can select the site that you want to view by selecting the site name in the drop-down menu on the Administration bar:
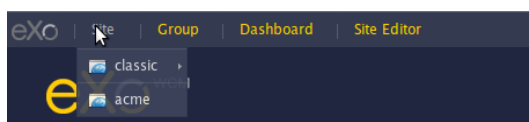
The main screen of the site will appear like the illustration below:

①   This is Administration bar which contains administration functions related to portals (websites).

②　This is Banner which contains slogan, logo, icon used in the website.

③　Thhe Navigation bar helps users to visualize the structure of the website and provide quick links to different pages.

④　This is Home page which is the main page of the website. This is the default page that is displayed first when you visit the website.

⑤　This is Footer of the web site. It can be texts, or image that is displayed at the bottom of the web site. It provides information about author/institutional sponsor, revision date, copyright and more.

4.2. Print a Web Content
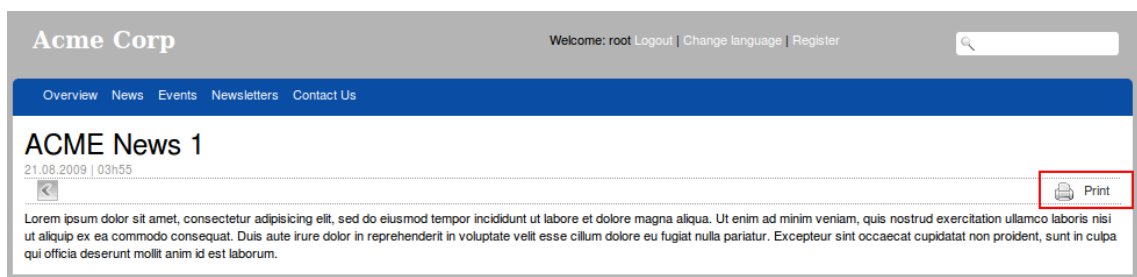
Users can easily print any content in a site by following these steps:

Procedure 4.1.

1.　Click **Read more** to read all the content of a document or an article in a site.
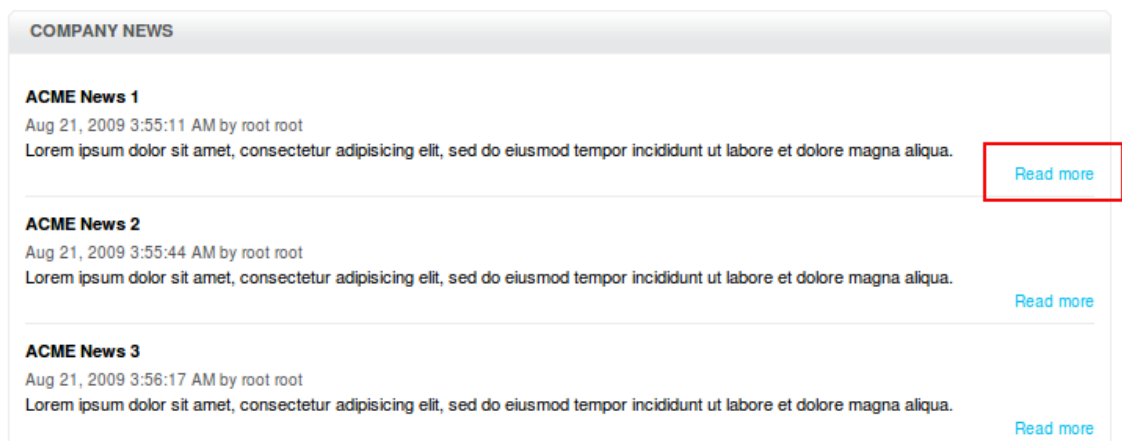
2.　Click the Print button, the Print Preview page will be displayed on another tab.

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

4.3. Contribute Content

4.3.1. Incontext Editing

Besides publishing a web content in Sites Explorer, you also may use this function to publish a site to everyone or only some groups/users that you want. Use Content List Viewer (**CLV**) to publish a web content.

CLV allows you to publish multiple content files directly to the Overview page.

Procedure 4.2.

1. Activate the **Edit** mode.
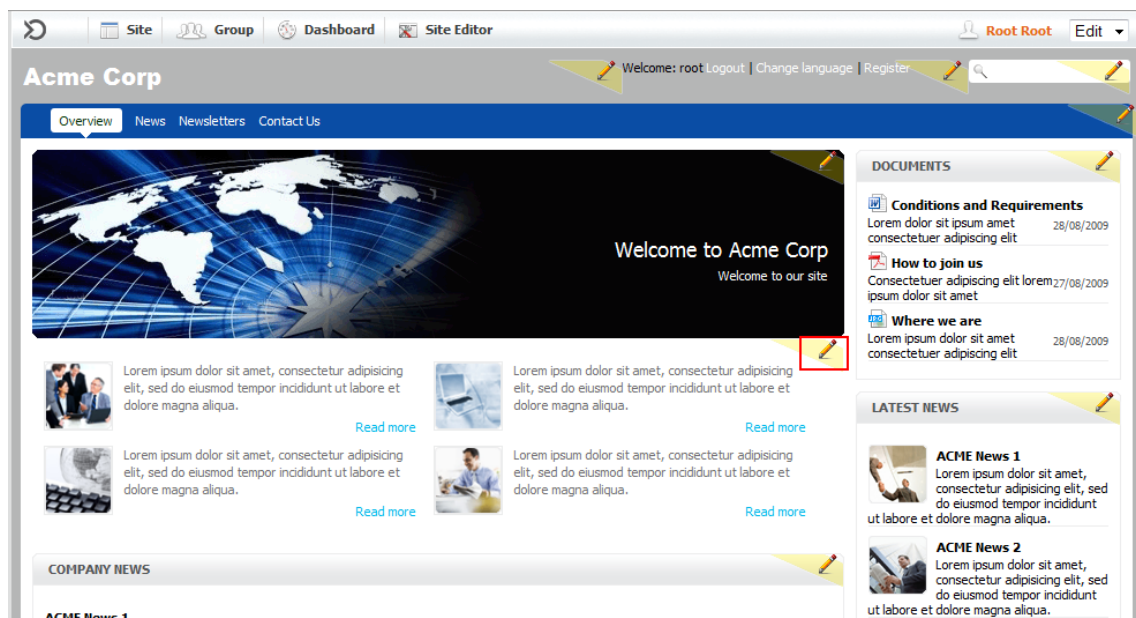
2. Click   the

    on the page element you want to edit.

    The **Content list viewer configuration** for that element will appear.

Table 4.1.

Field	Details
Mode	This mode is to select web content for list viewer. There are two modes: • By Folder: This mode allows you to select a content folder in the Folder path field. • By Content: This mode allows you to select by the content in a specific folder in Folder path field.
Folder Path	The path to a location of a folder that contains the content.
Order By	The field is selected to sort content in the list viewer. You can sort content by Title, Date created or Date modified in ascending or descending order.
Header	The title for all content that are listed in List Viewer.
Viewer Template	The template is used to view content list.
Paginator Template	The template is used to view each content in list.

Field	Details
Items per Page	The number of items will be displayed per page.
Show Image	The option is to show or hide the illustration of each published web content/ document.
Show Summary	The option is to show or hide the summary of each web content/document.
Show Header	The option is whether to show a header or not.
Show Refresh Button	The option is whether to show the refresh button at the left bottom of this page or not.
Show Title	The option is to show or hide title of each published web content and/or document.
Show Date Created	The option is to show or hide the created date of each published web content/ document.
Show Link	The option is to show or hide the link of web content and/or document.
Read More	The option is to show or hide the Read more to read all the content of a web content and/ or document.

3. Browse the documents available by clicking

   next to the folder path.

4. • If you selected the **By Folder** mode, select an available site on the left then select a folder that contains content on the right.
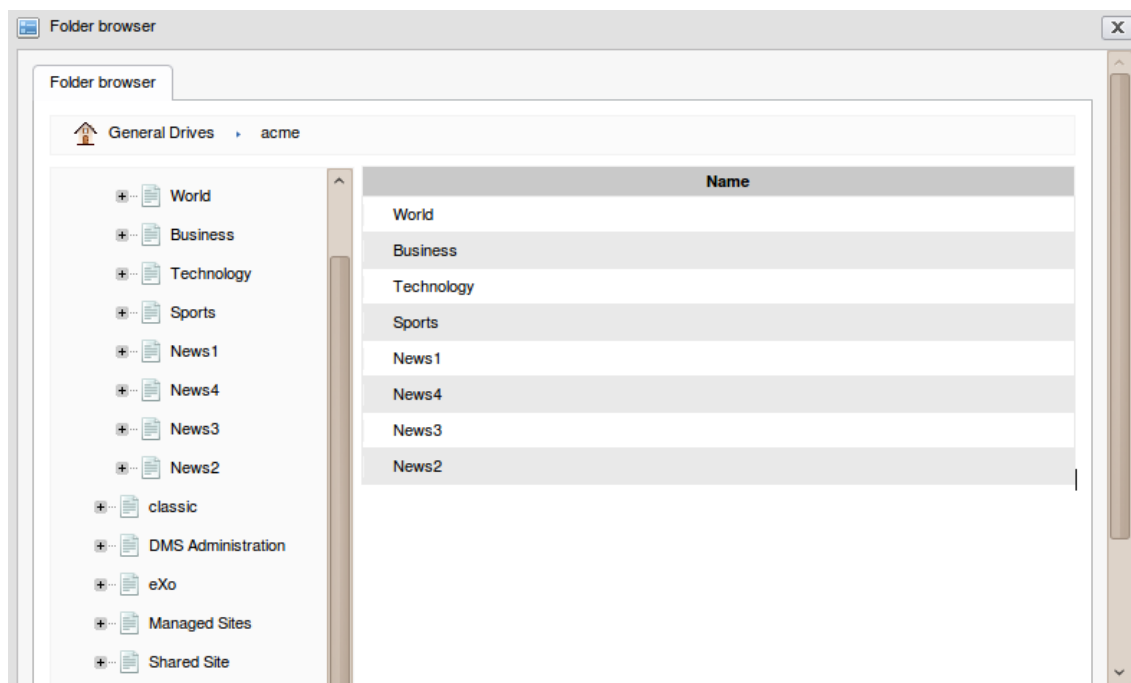
- If you selected the **By Content** mode, select and available from the left pane and all content in the folder will be listed int he right pane

5. Select content by clicking the content in the **Name** column and a message informs that you have successfully added it in **List Content**.

6. Click **Save** to publish the new content or.

New content will appear in the **Overview** page when the above procedure has been completed successfully.

> ### Draft Versions
>
> If you are turning on the **EDIT** mode, you will see all the **DRAFT** and **PUBLICATION** versions of the Content List Viewer, thus you can edit a draft version by clicking the **Edit**.
>
> But if the **LIVE** mode is turned off, only the **PUBLICATION** versions are displayed.

4.3.1.1. Add Content

4.3.1.2. Edit Content

4.3.1.3. Manage Content

4.3.1.4. Preferences

4.3.2. Publication Process

4.3.2.1. Request Approval

4.3.2.2. Approve

4.3.2.3. Publish

4.4. Content Inside Categories

4.4.1. What is a Category in eXo Content?

4.4.2. Create a Content

4.4.3. Organize Content

4.4.4. Pros and Cons

4.5. Dynamic Navigation in eXo Content

4.6. Sites Explorer

4.6.1. Access Sites Explorer

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

Procedure 4.3.
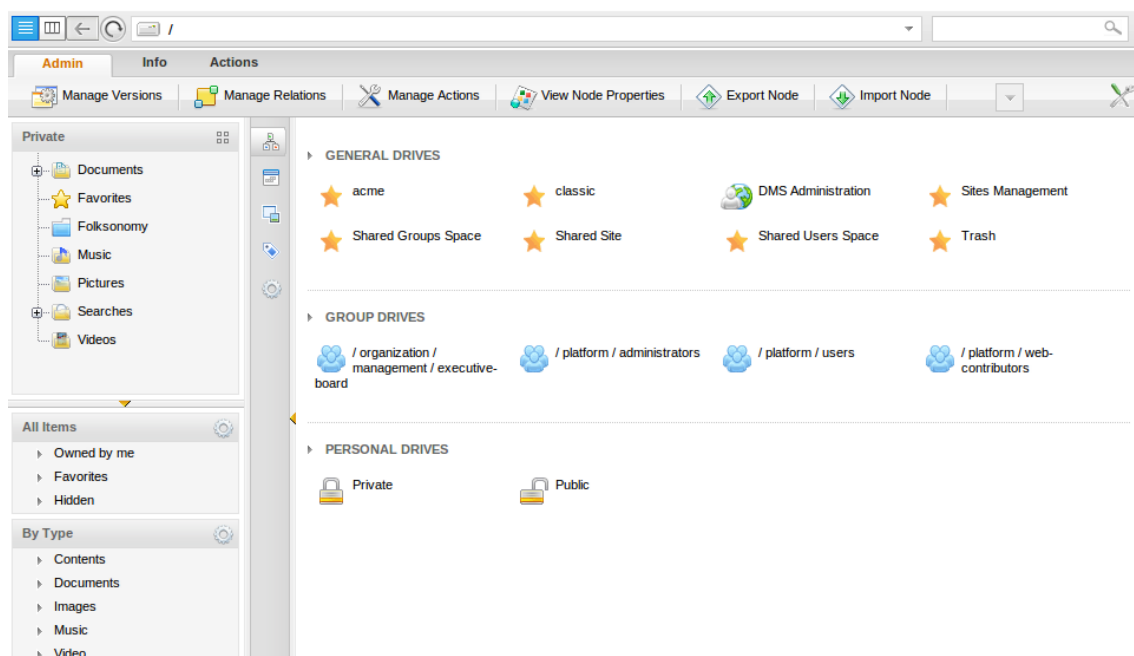
- Go to Group | Sites Explorer on the administration bar:
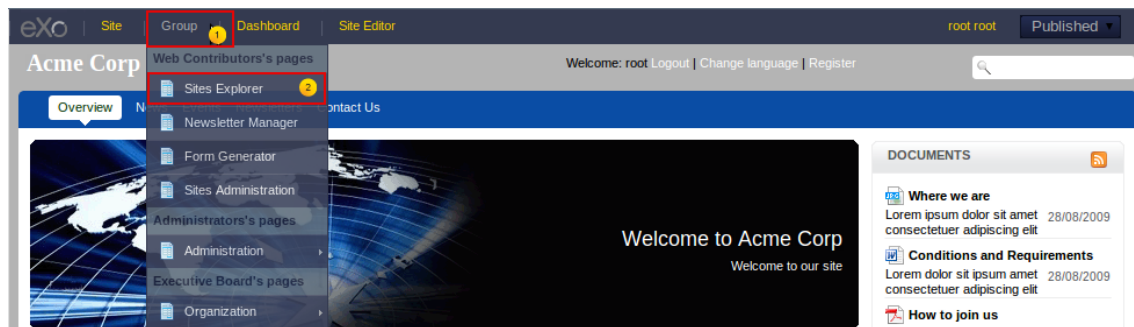
A list of all drives in Sites Explorer displays:
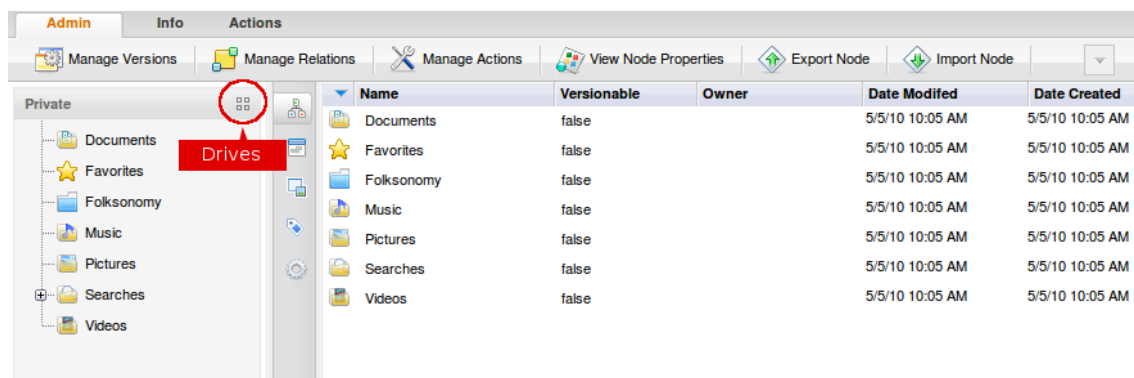
There are some specific drives to choose to work on, they are organized in groups: Personal drives, Group drives and General drives.

Personal drives:

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

▶ **PERSONAL DRIVES**

🔒 **Private**   🔓 **Public**

Group drives:

> The drive of a group is the working space of users in that group.

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

▶ GROUP DRIVES

/ organization / management / executive-board   / platform / administrators   / platform / users   / platform / web-contributors

General drives:

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

4.6.2. Drives

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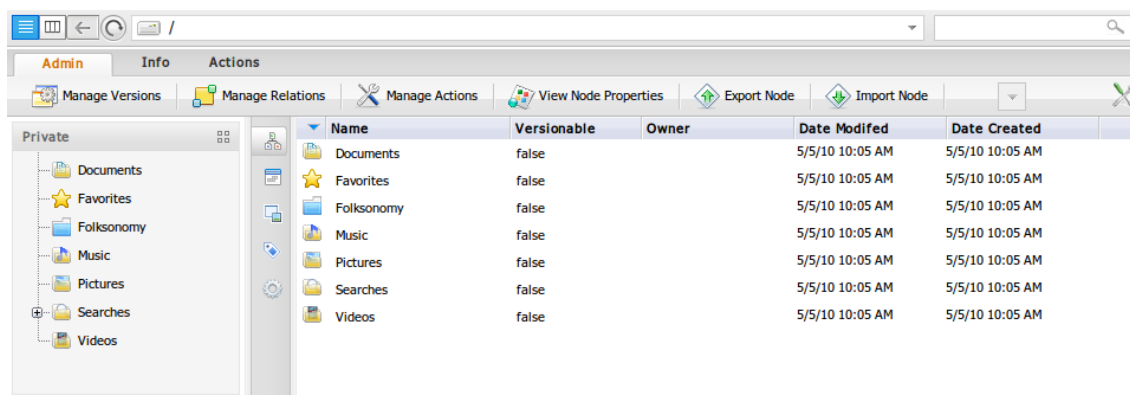
Private drive contains personal data of registered users. Hence, only these individuals can access data in this drive type.

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

-
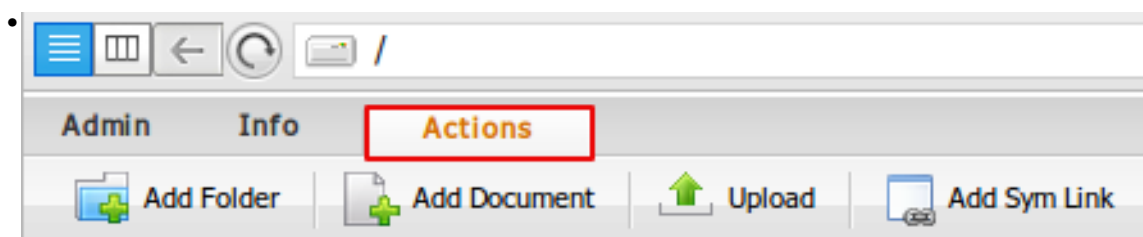
By selecting the Actions tab, you can:
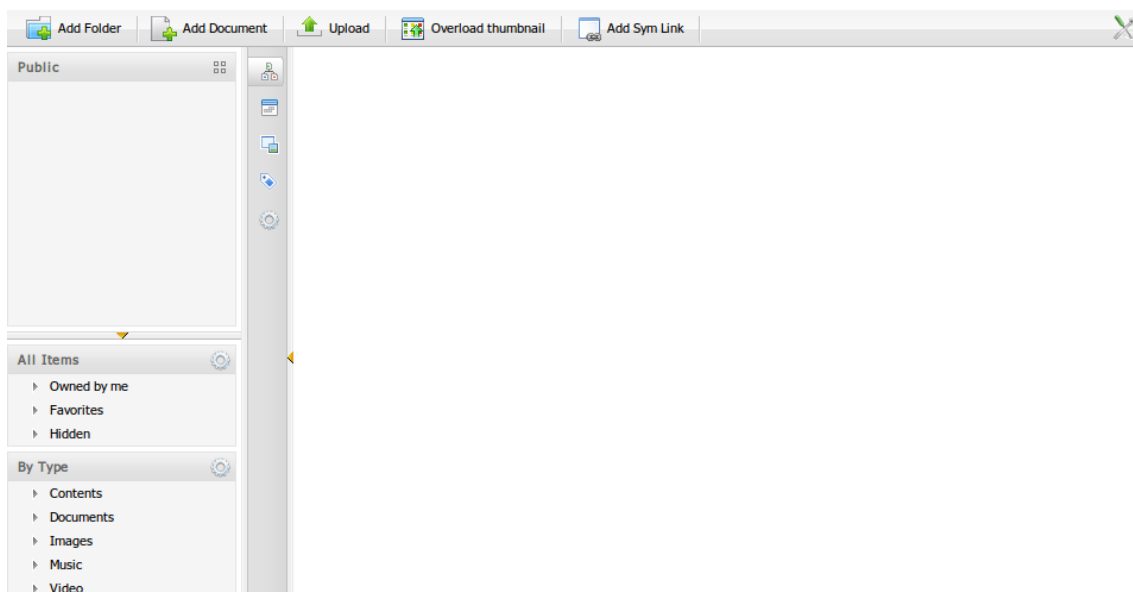
- Create a new folder

- Create a new document

- Upload file from your computer

- Add Sym Links

- Overload Thumbnails

- By selecting the Collaboration tab, you can:
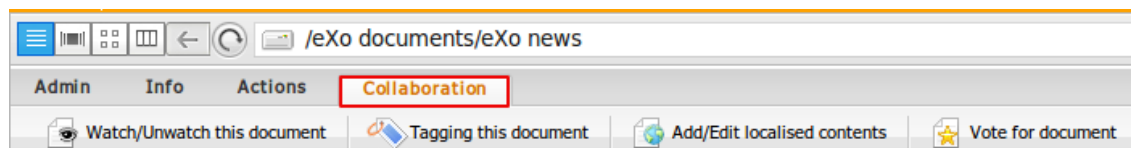
- Watch/Unwatch a document.

- Add tags for a document.

- Set multi-display languages for document.

- Vote for a document.

- Comment for a document.

- By selecting the Search tab, you can:

  - Do the simple search

  - Do the advanced search with more constraints, add new query to search

  - Do search by existing queries.

- In addition, you can:

  - Setup your browsing preferences

  - Cut/paste, Copy/past, Delete a node

  - Lock a node

  - Rename a node

  - Use the view WebDAV function to view document content.

  - Download documents (folders) to your machine.

4.6.2.2. Public drive

With the Public drive, there's no initialized folder but you can create by yourself.

In the Public drive, you also can take actions like in the Private drive.

4.6.2.3. Drive of a specific group

By default, there are two initialized folders but you also can add more and take actions like in Private drives. Only users in a specific group can access its drive.
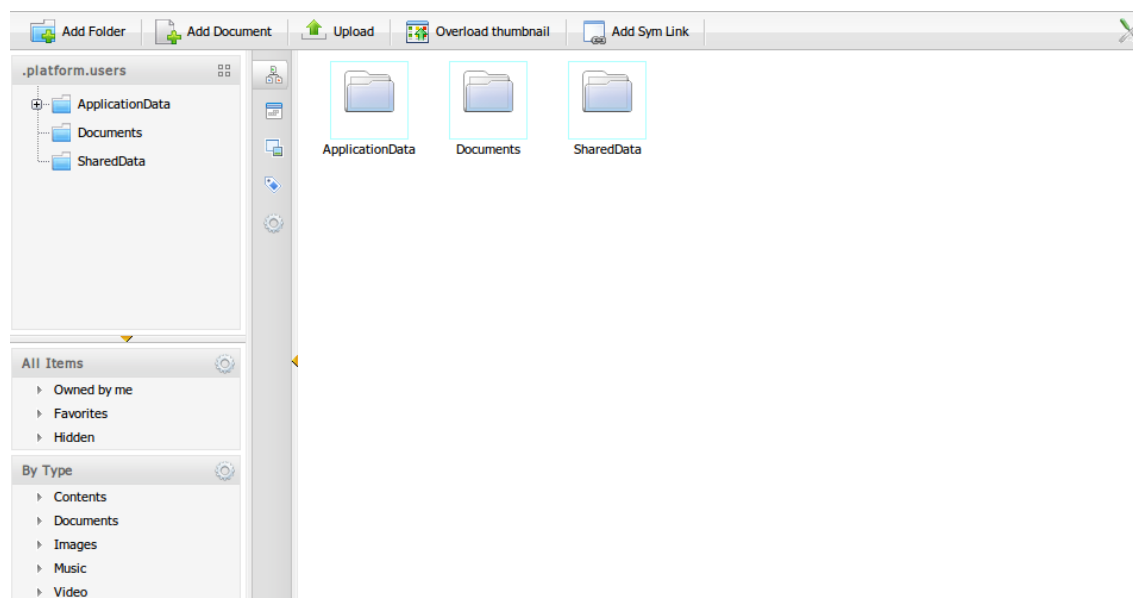
4.6.2.4. Shared Users Space drive
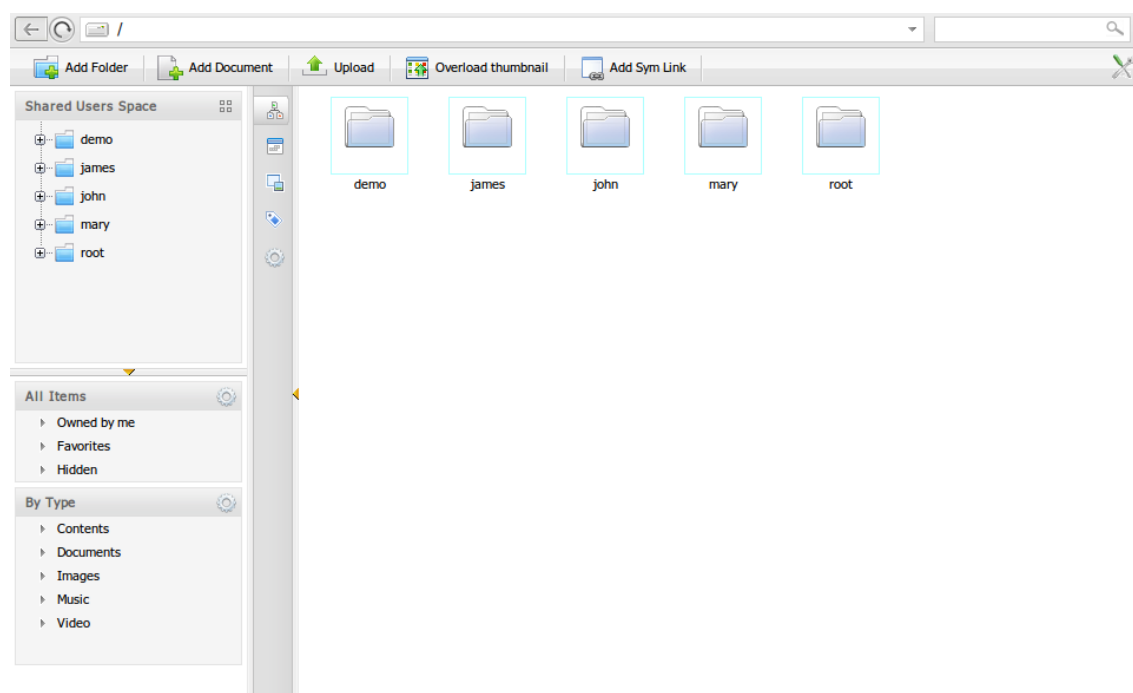
By default, there will be a list of all folders named after existing users, each user has a folder that includes two sub folders (private and public). You can see both your private and public folders here but you can see only the public folder of others.

- In this drive you can:

- Perform all actions that you can do in your private drive.

- View nodes from public folder of others

- In this drive you can not:

  - Add a folder/document in a root node

  - Add a folder/document in a folder named by other users and in child nodes of this folder.

  - Add a folder/document in a folder named by your username

  - Rename a default folder

  - Lock folders named by a user

  - Delete a default folder

4.6.2.5. Show/hide the sidebar in a drive

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

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

1. **Procedure 4.4. Method 1**

   1. Click   the

      icon to open the 'Preference Setting':
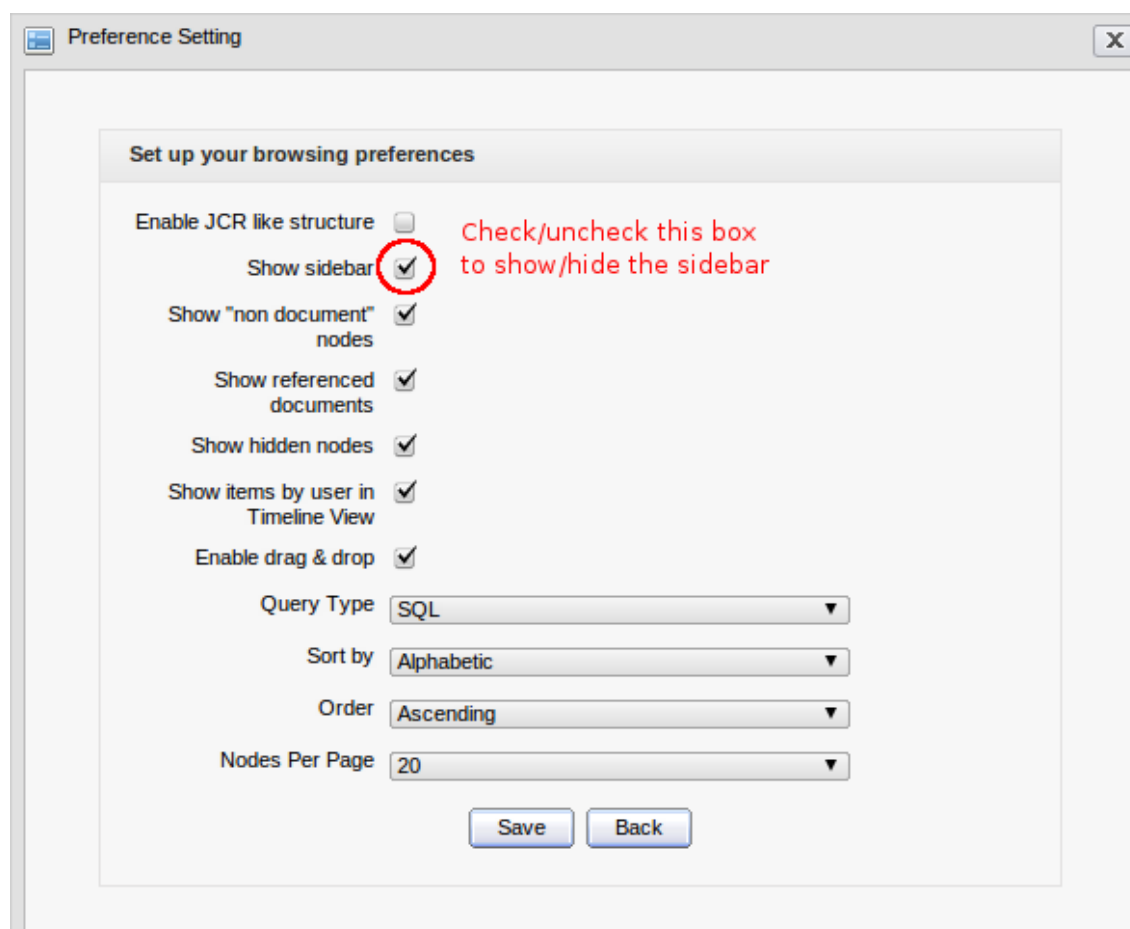
2. Unselect the Show sidebar check box | Click **Save**.

   The drive will be displayed like the illustration below:
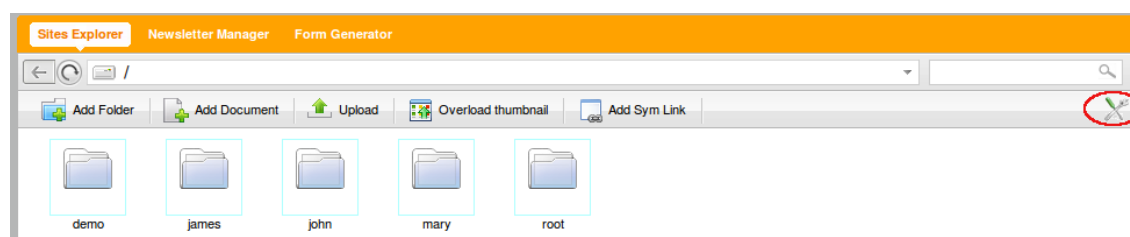
3. To show the side bar, select the **Show sidebar** check box in the '**Preferences**'.

2. **Procedure 4.5. Method 2**

1. Simply click the border of this sidebar to hide it as the illustration below:
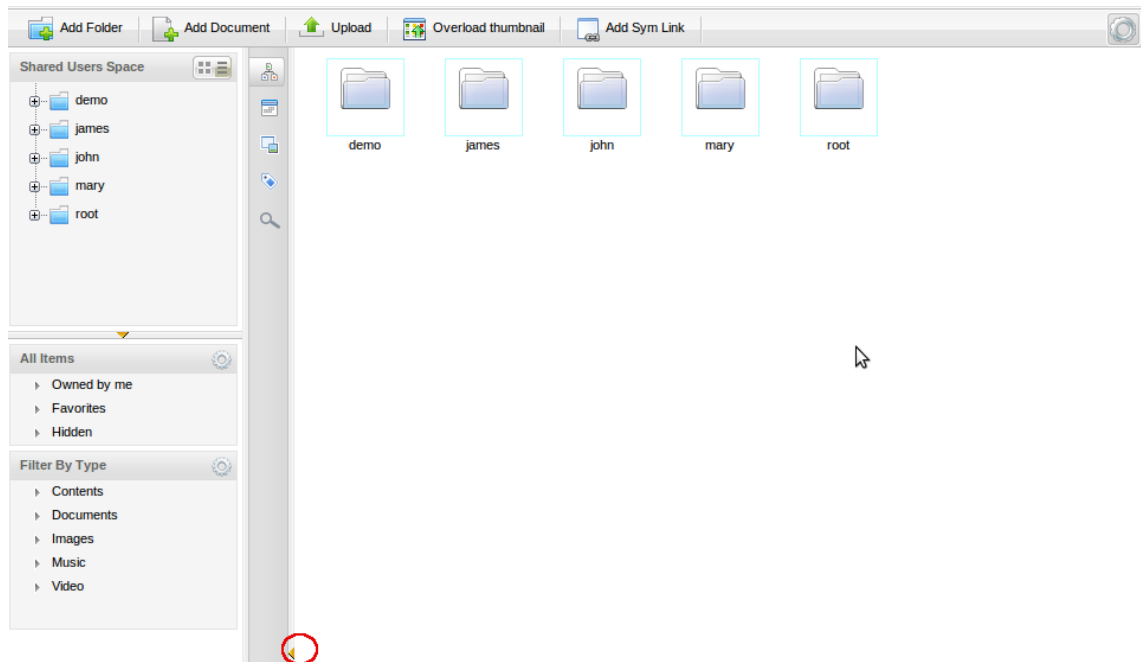
2. Click that border again to show the sidebar back.

4.6.3. Views

- What is a view?

- Explain view and tab mechanism.

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

> **View Types**
>
> The number of View types depends on what drive you are browsing.You can manage the view types in the WCM Administration. See *Section 5.3.2.3, "Manage Views"* for details

4.6.3.1. Admin view

In this view, each item in list includes following information: Name, Date Created, Date Modified, Owner, Versionable and Auditing. These information will help you manage nodes easily.
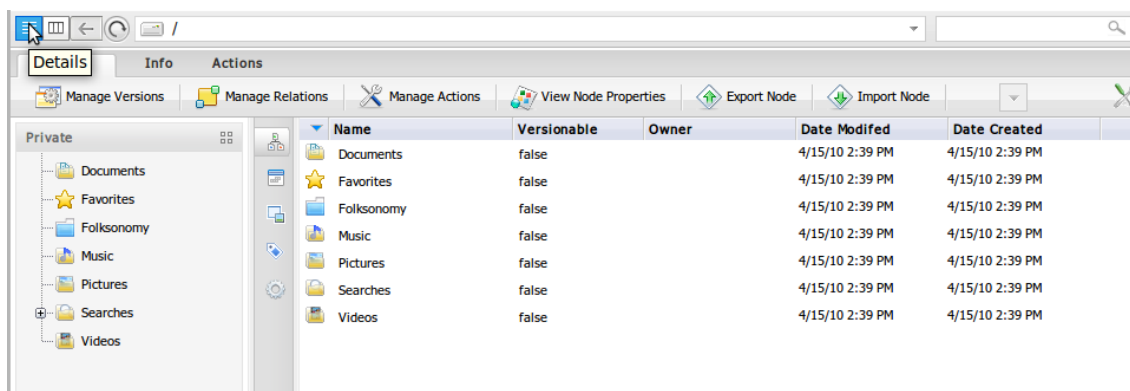
You also can sort nodes basing on node information by clicking the label of corresponding column. The

indicates that nodes are ordered in ascending order and on the contrary, the

icon means nodes are in descending order.

4.6.3.2. Icons View

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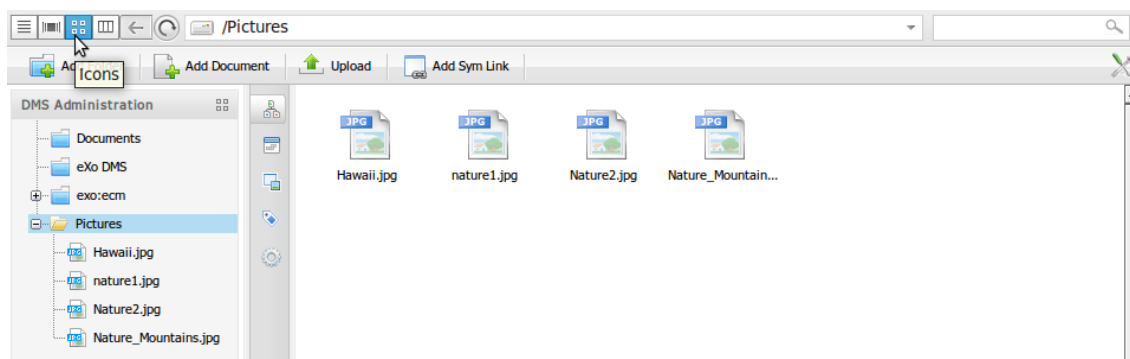
4.6.3.3. Thumbnails View

With thumbnails view, nodes in a specific folder are viewed as icons bounded by frames. Name of each node is shown under its icon.
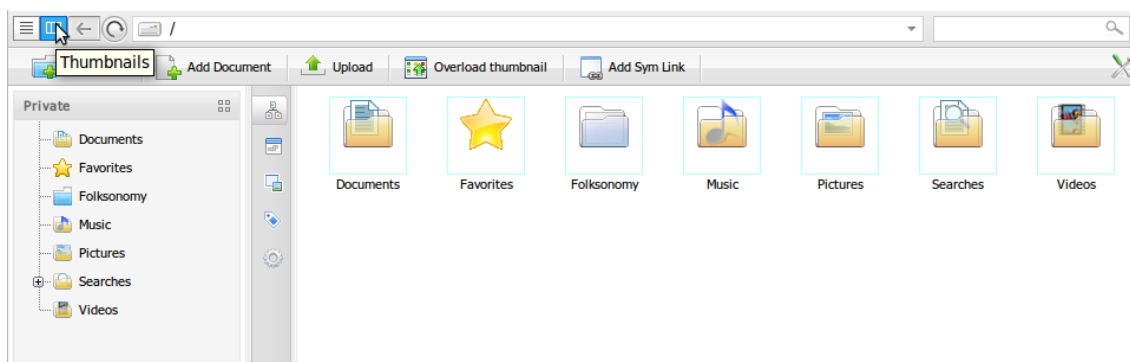
If nodes are image files, their thumbnails will be shown like the screenshot below:
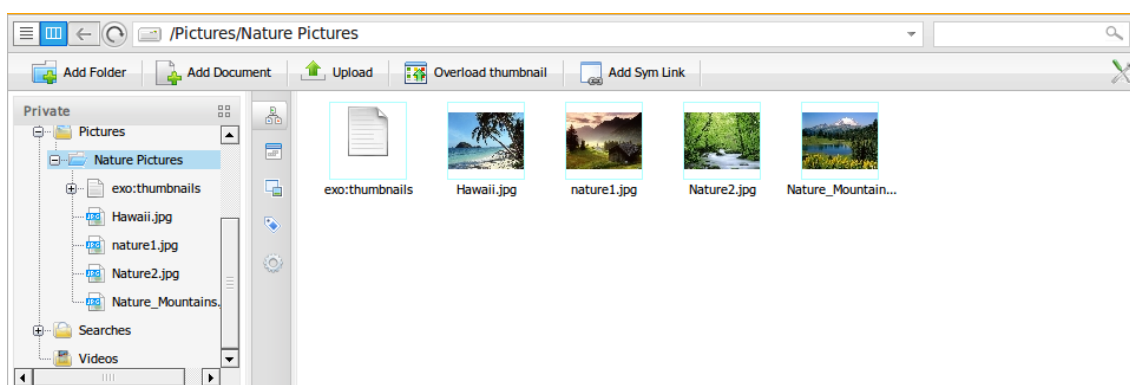
Especially, in this view, you can overload thumbnail image for node. For an example, if you want to add thumbnail image for **Digital Assets**folder, do as follows:

Procedure 4.6.

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

2. Click

   to open the Add thumbnail image form:
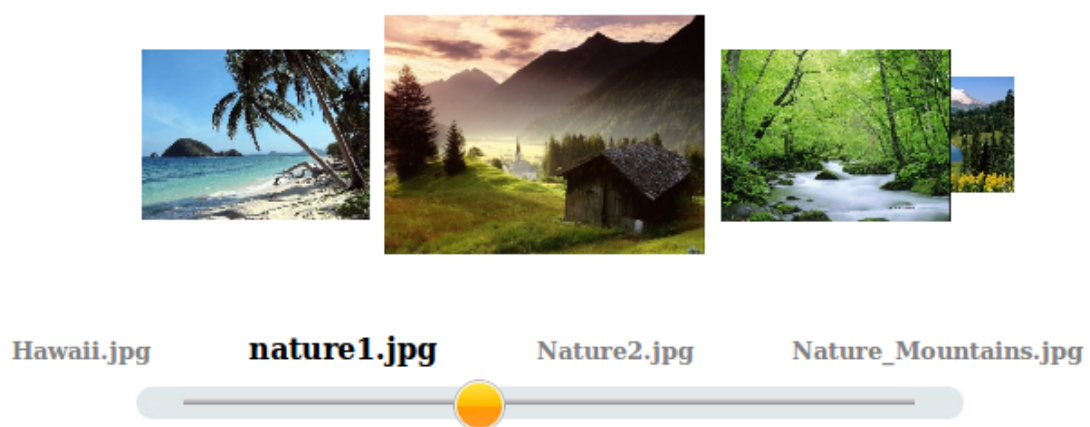
3. Select an image used as a displaying icon for the selected folder by clicking the **Browse...**button.

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

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

4.6.3.4. Cover Flow View
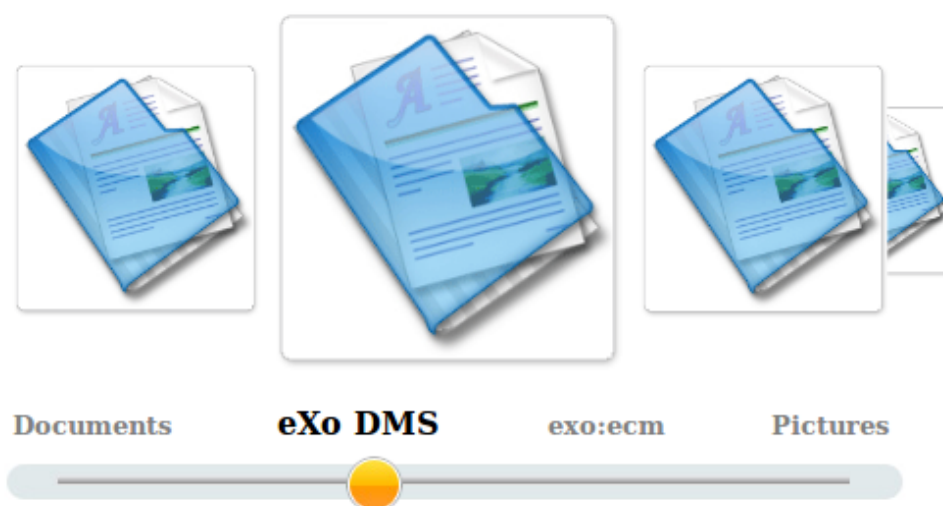
You can understand this view as a dynamical view because it brings the side-scrolling view to nodes in a folder. In this view, when a node is selected, its name is set with bold effect to more outstanding than others.
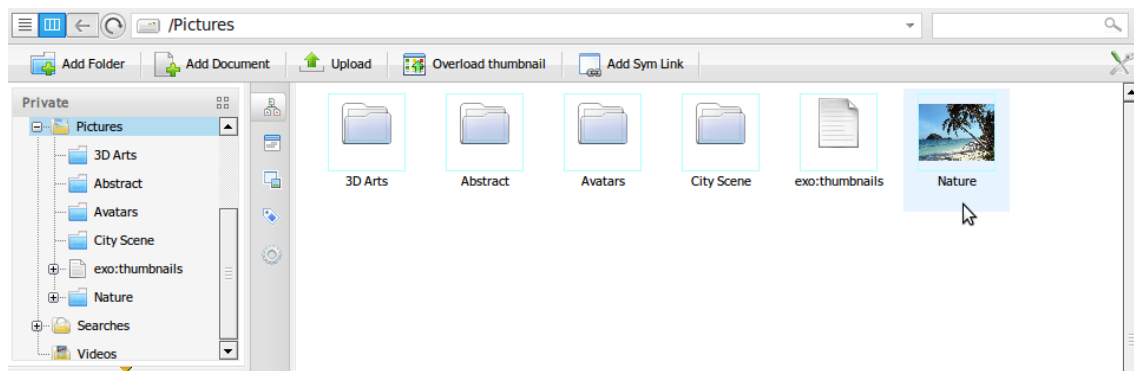
If nodes are pictures, they are shown like:

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

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

- Use the mousewheel.

- Hold and move the yellow circle button to the left or the right.

- Click the folder/document name that you want to select.

4.6.3.5. Slide Show View

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

To view pictures in slide show, click the

icon:
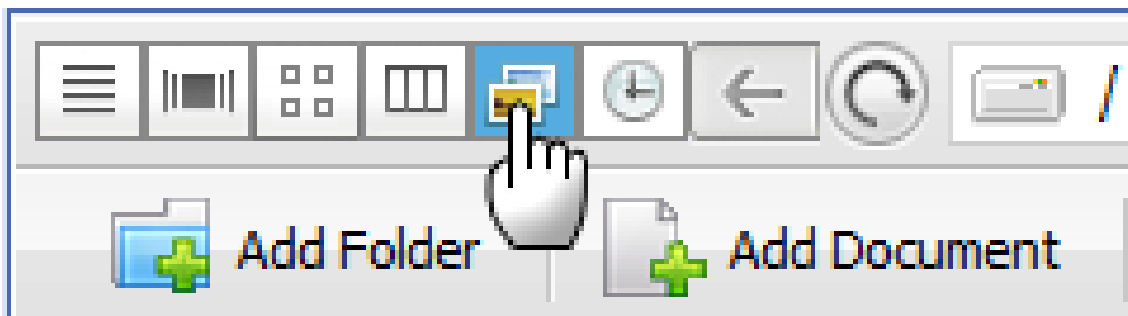
If nodes are pictures, they are displayed like the following illustration:
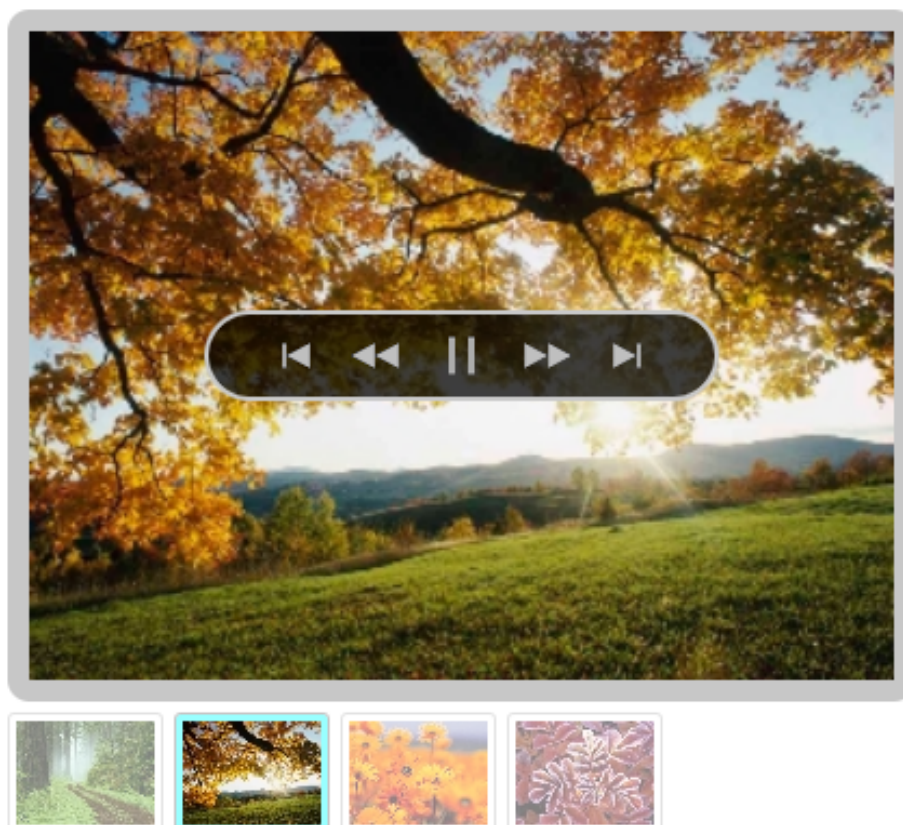
The Slide show view automatically show all picture nodes, users can control this slide show by clicking the below buttons:
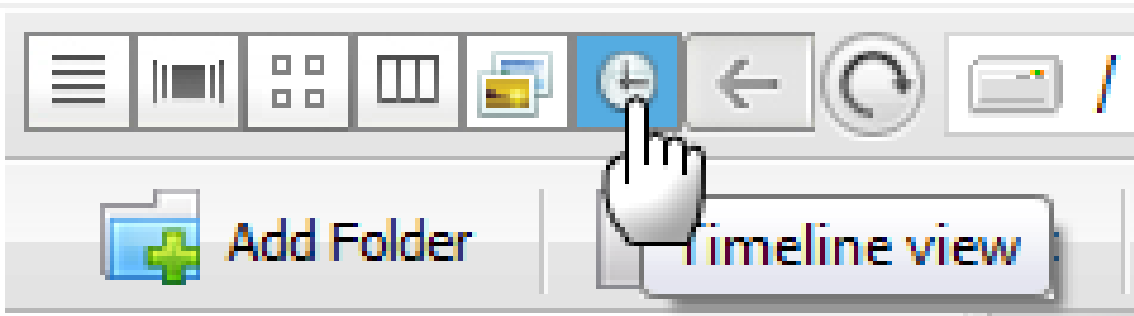
Table 4.2.

Button	Function
◄	Go to the first picture node.
◄◄	View the previous picture node.
❚❚	Pause the slide show.
►►	View the next picture node.
►❙	View the last picture node.
►	Continue viewing pictures node.

4.6.3.6. Timeline View

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

🕐

icon.

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

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

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

You   can   also   click   the

★

to   mark   your   item   as   favorite   or   the

★

icon corresponding to nodes in order to remove it from favorites.

4.6.4. Actions

4.6.4.1. Add Category

This function enables you to add a category for a node.
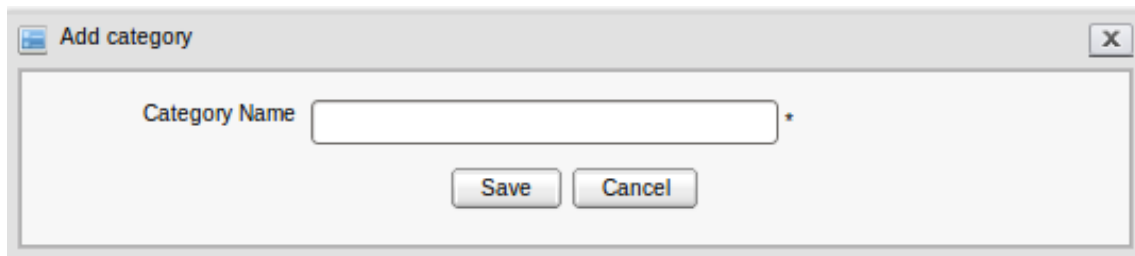
Do as follows to add a category:

Procedure 4.7.

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

2. Select   on
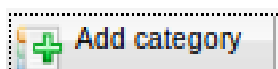
    ✚ Add category

    the action bar and the Add Category form appears:

    Add category   ✕

    Category Name [   ] *

    [Save] [Cancel]

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

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

4.6.4.2. Add a document

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

The table below outlines which nodes types different document types can be added to. The rows indicate what the node in the left column can be added to. The columns indicate what the node at the top can contain.

Table 4.3.

	File	Article	Podcast	Sample node	File Plan	Kofax documen	Content folder	Documen folder
File	✓	✓	✓	✓	✓	✓	✓	✓
Article	✓		✓			✓	✓	
Podcast	✓	✓	✓	✓	✓	✓	✓	✓
Sample node	✓		✓			✓	✓	
File Plan	✓		✓		✓	✓	✓	✓
Kofax	✓	✓	✓	✓	✓	✓	✓	
Uploaded file	✓	✓	✓	✓	✓	✓	✓	✓
Content folder	✓	✓	✓	✓		✓	✓	
Document folder	✓		✓		✓	✓	✓	✓

i

- ✓

  : The corresponding document can be added into.

- A blank entry means the corresponding document can not be added into.

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

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

To add a new document, do the following steps:

Procedure 4.8. Add a new document:

1. Select a folder from the left pane that you want to add a new document to.

2. Click

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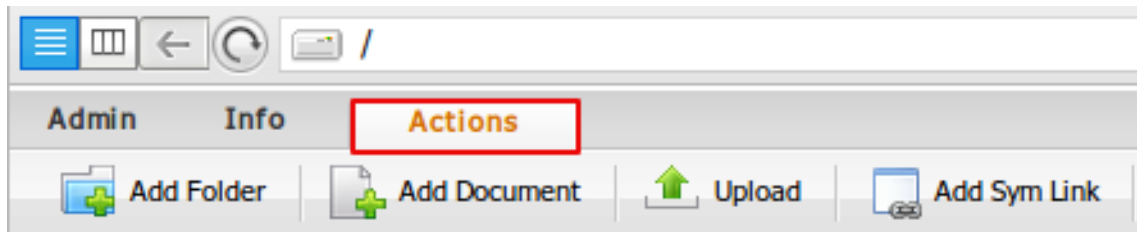
3. Select the document type (template) that you want to create from the drop-down list (Article is selected by default).

   Each document (except Article) must be added to catagories when created.

Procedure 4.9. Attach files to a document

1. Select the document that you want to attach files to and click
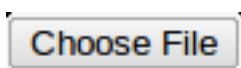
   in the **Actions** bar.

   The **Upload file** form will appear.

2. Enter a name into the **Name** field.

3. Click   on

   to select the attachment file. You can click

to add multiple files.

4.   Click **Save** to attach the files or **Cancel** to to quit.

Procedure 4.10. Create a new File document

1.   Follow the steps in *Add a new document:*), to open the **Add New Document** form then select
     File from the drop-down list.

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

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

3.   Click   the

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

     •   **text/html**: when creating a text/html File document, you can input value in the Content field
         like source code (HyperText Markup Language HTML). After being created, it will generate

the content you want, then you can see both the inputted source code and the generated content in that document.

- **text/plain**: after being created, it will display exactly what you inputted in the Content field.html.

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

- **text/html**:   If   you   want   to   create   a   File   document with   a   source   code   and   generated   content,   click
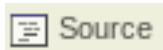
in   the   editor   bar.   In   this   mode,   only   Save,   New   Page, Preview   icons   in   editor   bar   are   visible   for   using.   Click   the

to preview the generated content.

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

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

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

View as HTML | View as Plain text

Hard Work and Success - One Follows the Other

The common sense point here is simple -- and sobering for those who are looking for career success shortcuts. Be willing to go the extra mile. Create custom resumes for every job for which you apply. Once you get a job, work harder than others. Volunteer for unpopular jobs -- and then do a great job. Yes, if you want to become an outstanding performer, it's important to be a lifelong learner, set and achieve high goals, and get organized. But it's also important to do something a lot simpler -- and totally in your control; be willing to work hard. Hard work will help build your brand and put you at the

View as HTML | **View as Plain text**

Hard Work and Success - One Follows the Other%20

```
<p>The common sense point here is simple -- and sobering for those who are
looking for career success shortcuts. Be willing to go the extra mile.
Create custom resumes for every job for which you apply. Once you get a job,
work harder than others. Volunteer for unpopular jobs -- and then do a great
job. Yes, if you want to become an outstanding performer, it&#39;s important
to be a lifelong learner, set and achieve high goals, and get organized. But
it&#39;s also important to do something a lot simpler -- and totally in your
control; be willing to work hard. Hard work will help build your brand and
put you at the top of the promotion list, and bottom of the layoff list.</p>
```

Procedure 4.11. Create a new Article

1. Follow the steps in *Add a new document:* to open the **Add New Document** form then select **Article** from the drop-down list. (Actually, Article is selected by default).

   The **Add New Document** form will be displayed like the following illustration:
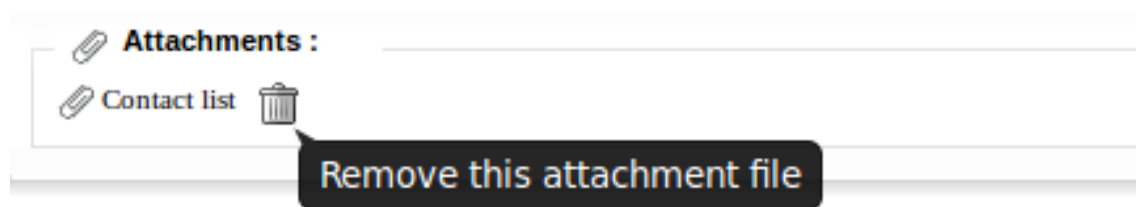
2. Input the name and the title of the Article in the **Name** and **Title** field, some special characters can not be used in the Name field (@ # % & * ( ) " ' : ; [ ] {} / !).

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

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

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

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

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

.

Instructions to add an attachment are in *Attach files to a document*.

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

Procedure 4.12. Create a New Podcast

1. Follow the steps in *Add a new document:* to open the **Add New Document** form and select **Podcast** from the drop-down list.

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

Table 4.4.

Field	Details
Name	The name of a document. This field is required. Some special characters are not

Field	Details
	allowed to input in the Name field(@ # % & * ( ) " ' : ; [ ] {} / !).
Title	The title of a document.
Categories	Categories of a document.
Link	The link to the source path of the uploaded media file. This field is required.
Author	The author of the uploaded media file.
Explicit	It is used to indicate whether or not your podcast contains an explicit material. There are two options: • *Yes*: an "explicit" parental advisory graphic will appear next to your podcast artwork • *No*: you see no indicator – bank is default advisory type
Category	The category of the uploaded media file, example: music, film, short clip, etc.
Keyword	Keyword allows you to search your podcast files more quickly. You can use commas to separate between keywords.
Publish date	The date when an episode was released.
Description	Information about the uploaded media file.
Mime type	The type of the uploaded media file.
Length	The length of the uploaded media file.

2. Input values for fields. To upload a media file, click the **Browse...** button and select the media file from your machine. Then click

    next to the **Browse...** button.

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

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

Once created, a Podcast will appear as so:

Podcasts can be listened to immediately, or transferred to another device.

Procedure 4.13. Create a new Sample node

1. Follow the instructions in *Add a new document:* to open the **Add New Document** window and select **Sample node** from the drop-down list.

   The **Add New Sample Node** form will appear liek in the following illustration:

2.   Complete the appropriate fields

3.   To upload an image, click the **Browse...** button and select an image from your computer. Click the upload icon (

) next to the **Browse...** button to upload the selected file.

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

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

The **Relations** area is used to list all its related documents. See *Section 4.6.4.15.3, "View Relations"*.

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

The **Attachments** area is used to list all its uploaded files. See *Attach files to a document*.

Procedure 4.14. Create a new File Plan

1.   Follow the instructions in *Add a new document:* to open the **Add New Document** window and select **File plan** from the drop-down list.

The **Add File plan** form will appear:

Tabs in the Add File plan form

The **Name** tab

Table 4.5.

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

The **Record properties** tab

Table 4.6.

Field	Details
Record category identifier	The alphanumeric or numeric identifier indicating a unique record category. This must be a unique ID and if left blank will be created automatically by the system.
Disposition authority	A reference number to the regulations that govern the disposition.
Permanent record indicator	A type of record indicators which should never be deleted.
Disposition instructions	A readable guidelines on how the records associated with the file plan will be handled.
Contains records folder	The confirmation is about whether the records folder is contained or not.
Default media type	The choice for preset media types which are made available to simplify the data entry for the record. The frequently-chosen value is "electronic" or paper.

Field	Details
Default marking list	Handling and classification information that are printed at the bottom of the record, such as UNCLASSIFIED or NOCONTRACT.
Default originating organization	This option is to enter the original arrangement as default which is made available to simplify the data entry for the record and to assume that originating organizations are the same for the information in the file plan.
Vital record indicator	This flag is to allow whether tracking or reminding you of the record as essential or not.
Vital record review period	The choice for the interval of time between vital record reviews.

The **Process Properties** tab:

Table 4.7.

Field	Details
Process cutoffs	The boolean datatype is used to break a process. If the process cutoff flag is set in the file plan, the record is cutoff after the

Field	Details
	expiration, or after it has been obsolete or superseded, depending on the information in the file plan.
Event trigger	The text datatype is an automatic executing code which is used to tell the event to perform some actions.
Cutoff period	The duration for the record cutoff performance.
Cutoff on obsolete	The record is cutoff when it is obsolete.
Cutoff on superseded	The record is cutoff when it is removed or replaced.
Process hold	This boolean datatype is used when a record process may be held before the further disposition is handled.
Hold period	The duration when a record may be held after cutoff which is normally measured in Years.
Discretionary Hold	The boolean datatype is used when a hold may be discretionary, such as after a command change. So, the discretionary hold flag allows the records management module to track these manual checks.
Process transfer	The boolean datatype is used to determine how a record process will be transferred.
Default transfer location	The text datatype is used to determine where a record is transferred by default.
Transfer block size	The float datatype is used to determine in what size blocks for organizational purposes that is normally measured in Years.
Process accession	The boolean datatype is flagged when a record which is held permanently must be ultimately transferred to the national records authority.
Accession location	The text datatype is flagged to specify an area for the accession transfer.
Accession block size	The text datatype is flagged to determine the blocks size for organizational purposes which is normally measured in Years.

Field	Details
Process destruction	The boolean datatype is flagged if there is any record to be destroyed. After that, the record is marked in the Alfresco system to be permanently destroyed so that all information, metadata and physical traces are removed and cannot be recovered.

2.   Complete appropriate fields.

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

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

Procedure 4.15. Create a new Kofax

1.   Follow the instructions in *Add a new document:* to open the **Add New Kofax** form and select **Add New Kofax** from the drop-down list.

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

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

3. Select categories for a Kofax document by clicking the

icon.

4. Click **Save** to commit changes or **Cancel** to quit.

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

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

Procedure 4.16. Create new Event

1. Follow the instructions in *Add a new document:* to open the **Add New Event** form and select **Event** from the drop-down list.

The **Add New Event** window will appear:

2. Enter a title for the event.

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

4. Enter the **Start** and **End Date/time** of the event.

5. Fill the **Summary** and **Content** fields.

6. Click **Save** to commit the event, or **Cancel** to quit without saving changes.

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

The event will be displayed in a website as:

4.6.4.3. Add Folder

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

There are two types of folder:

* Content folder.

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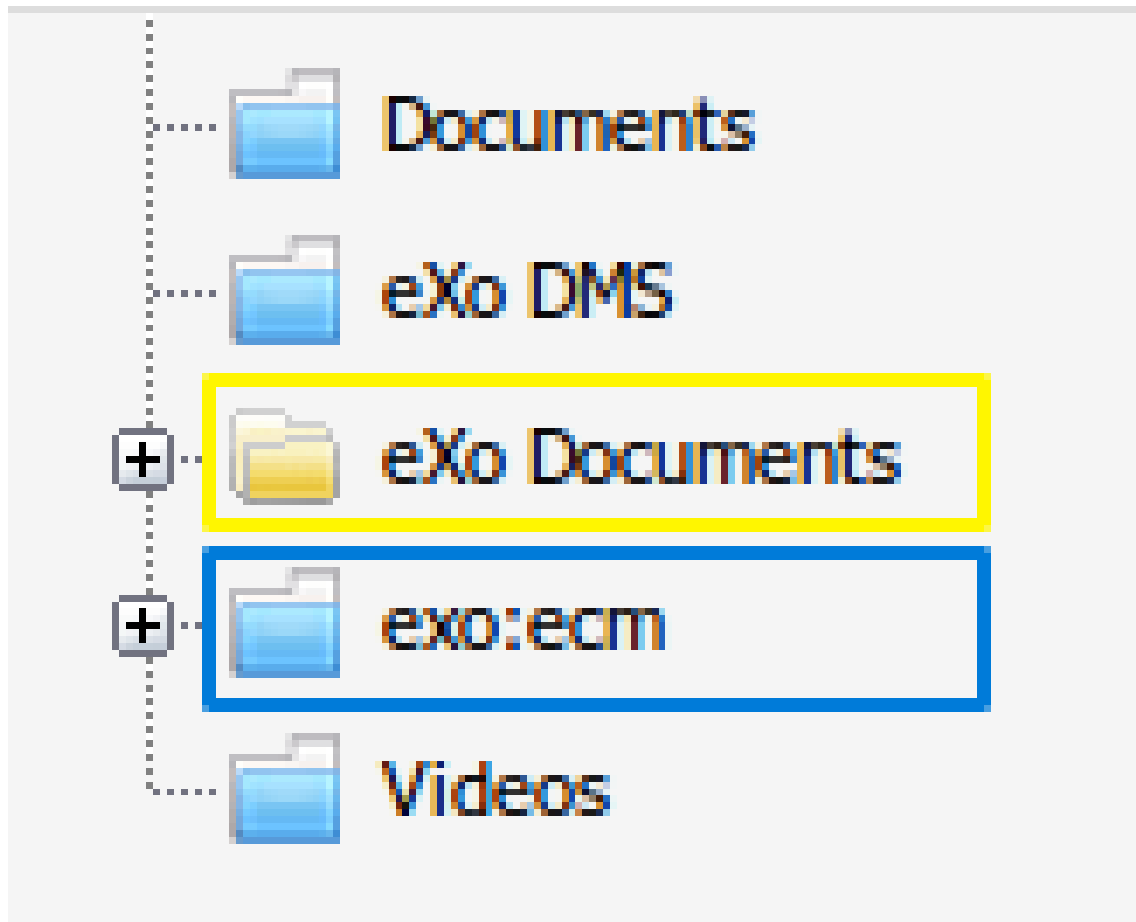
In default skin, the icon for a content folder node is displayed in blue and the icon for a document folder node is displayed in yellow.

File and folder types in a folder

Content folder

- You can add a Content Folder folder into a Content Folder one.

- You can add a Document Folder folder into a Content Folder one.

- You can add documents into a Content Folder.

- You can upload files (images, MS word documents, OpenOffice documents, .pdf files, .txt files, .xml file, etc) into a Content Folder.

- You can import sub node(s) that was exported into a Content Folder.

Document folder

- You can add a new Document Folder into a Document Folder.

- You can add File, Podcast, File Plan documents into a Document Folder.

- You can upload files (images, MS word documents, OpenOffice documents, .pdf files, .txt files, .xml file, etc) into a Document Folder.

- You can not add a Content Folder into a Document Folder

- You can not import an exported a Content Folder into a Document Folder.

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

Procedure 4.17. Create content folders

1. Select the path to create a folder.

2. Click

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

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

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

5. Click Save to accept creating a new folder.

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

You can create a document folder in a content folder or a document folder.
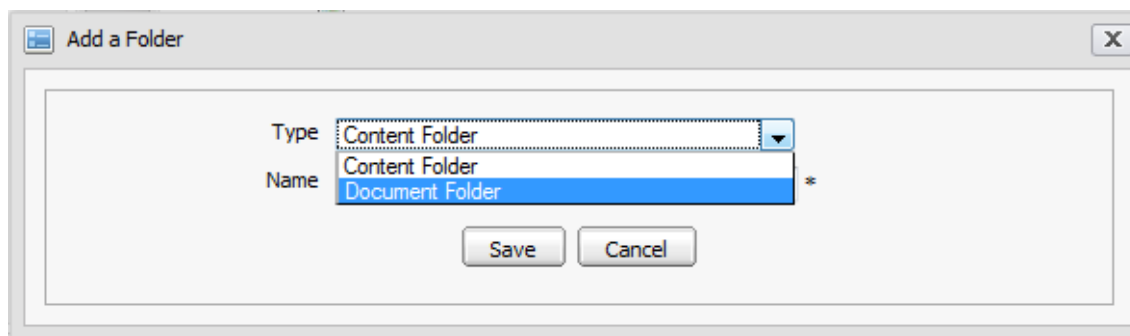
Procedure 4.18. Create document folders

1. Select the path to create a new folder.

2. Select the Actions tab.

3. Click

   . The Add a Folder form appears:

4. In the **Add a folder**form, click

   to see the folder types list and select Document Folder.

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

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

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

4.6.4.4. Add translations to a document

This function allows users to add multiple languages for a document. This action is similar to adding a language.

By default, the **Add translation** button is not displayed on the toolbar.
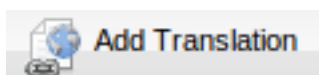
Enable this function by navigating to **Sites Administration**, then **Content Presentation**, then **Manage Views**.

Procedure 4.19.
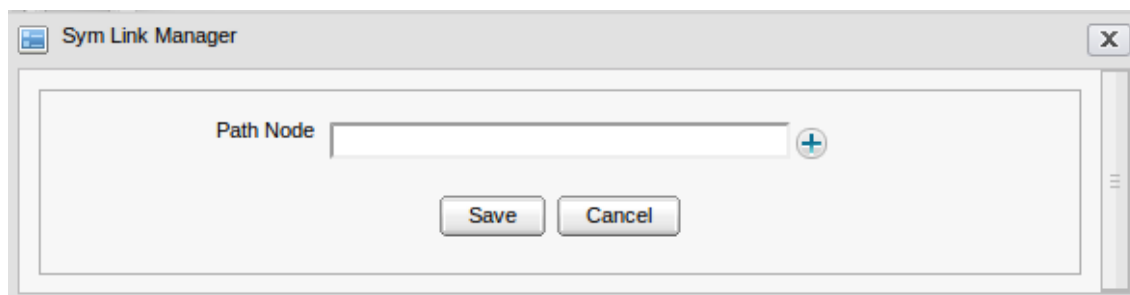
1. Select the document you want to add the translation for. For example; select an **Article** which is in *English*:
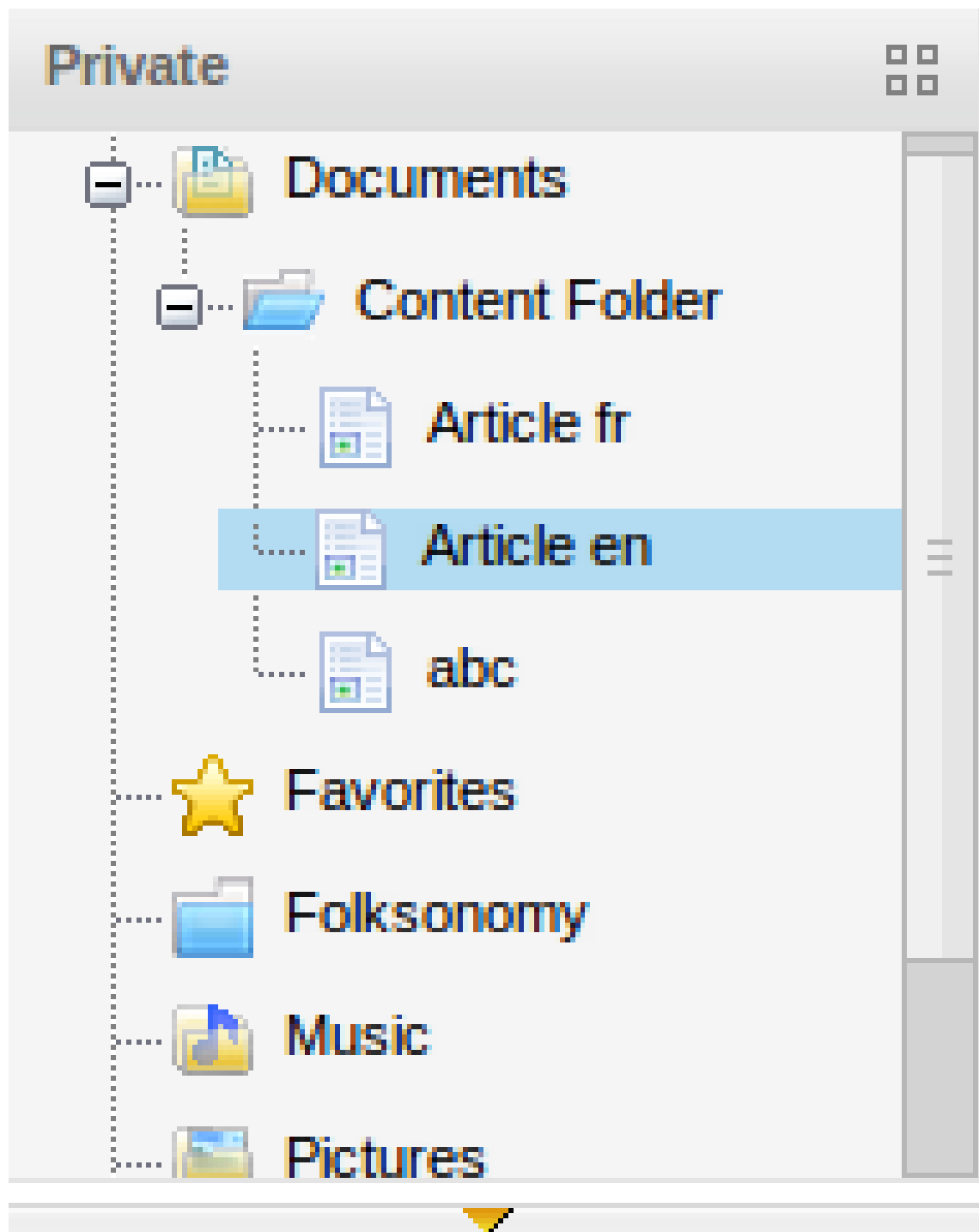
2. Click
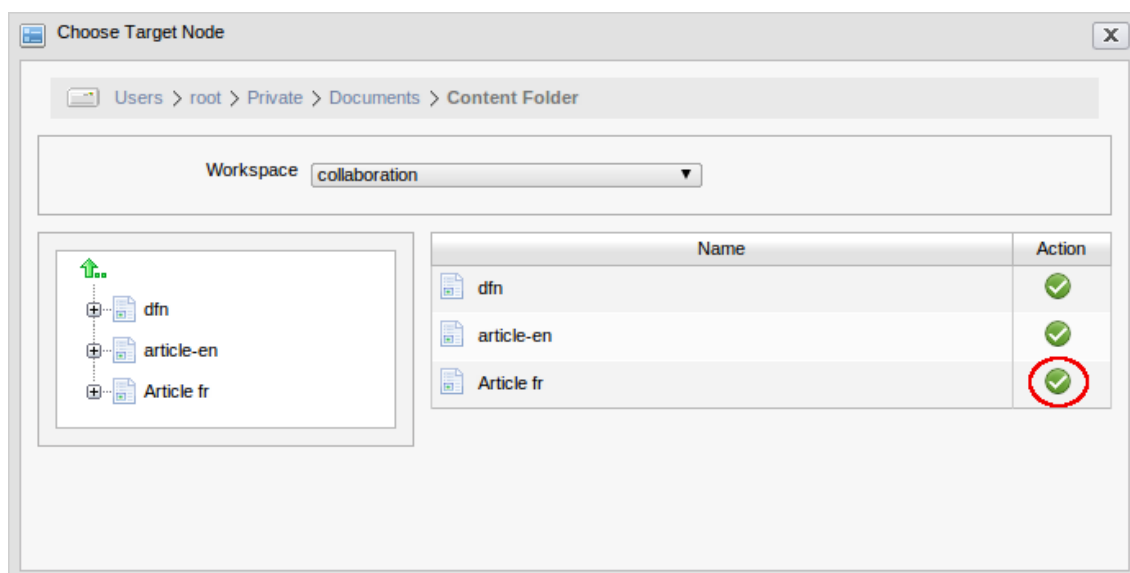
in the **Action** bar. The **Symlink Manager** will appear:
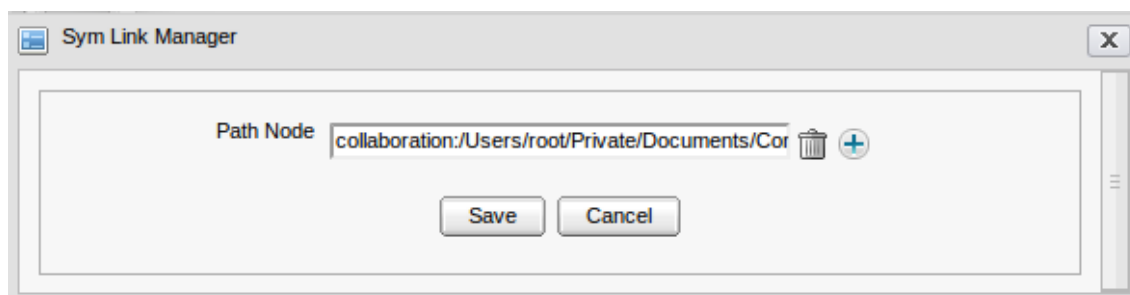
3. Click

    , then browse to the target document that has different language with the first document. For example, the **Article** version in French.

4. After you have selected the document, click **Save** on the **Symlink Manager** form:

5. Select the document which you have added the translation to, then click the **Relation** button on the sidebar.

    You will see the available language for the selected document. Click the language on this panel to view the document in the corresponding language version.

4.6.4.5. Add symlink

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

Procedure 4.20.

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

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

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

4.6.4.6. Comment

This function is used to comment on a document (Note: you cannot vote for a **File Plan** document).

Procedure 4.21.

1. Select the document that you want to add a comment to.

2. Select the **Collaboration** tag to show advanced actions.
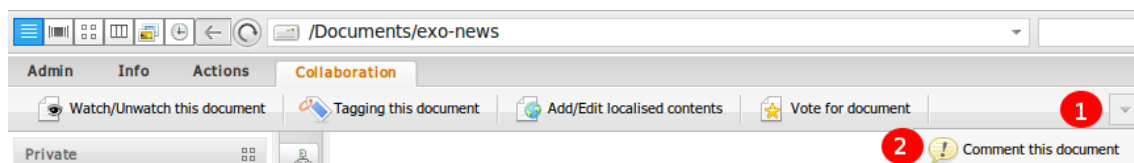
3. Click

.
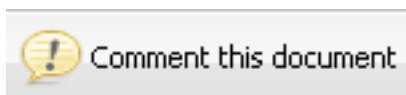
The **Add Comment** form appears:
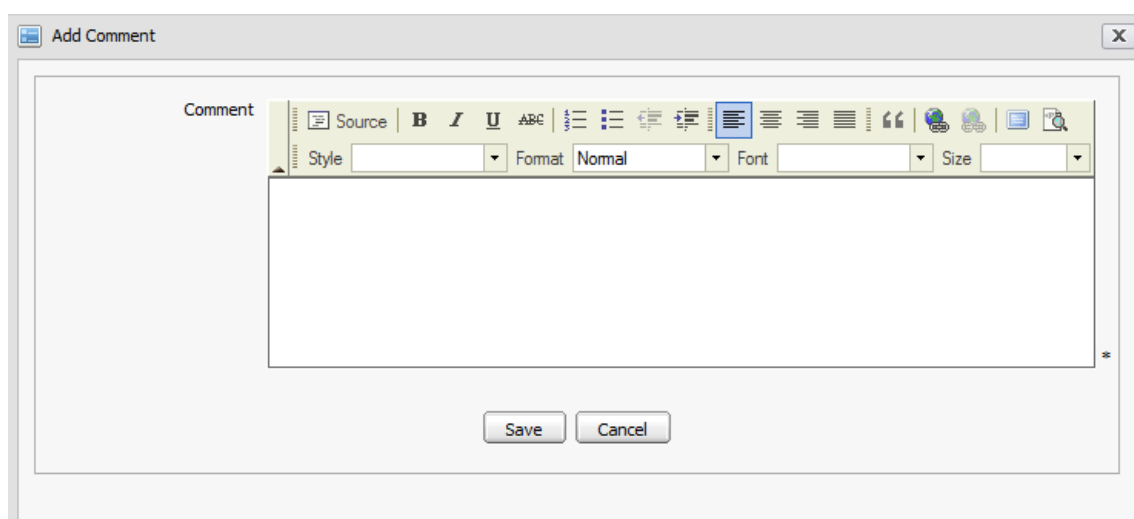
4. Add your comment in the **Comment** field.

5. Click **Save**.

Comments are shown at the bottom of the document:

To view your comment click the **Show Comments** link:

You can edit your comment by clicking the

icon or delete it by clicking

.
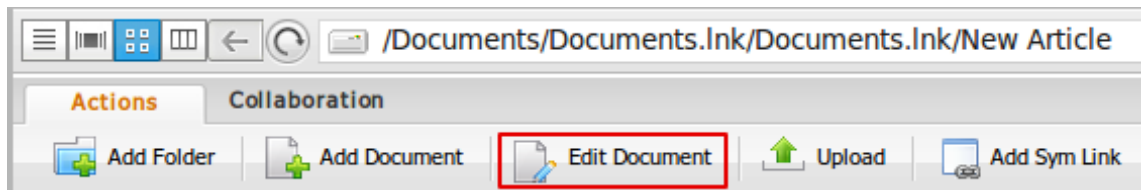
4.6.4.7. Edit documents
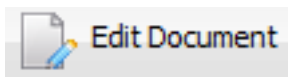
There are two ways to edit a document.

Procedure 4.22. Method One

1.   Select the document you want to edit in the left pane

2.   Select the **Actions** tab to show the Actions bar.

3.   Click

in the Action Bars

Or:

Procedure 4.23. Method Two

1.   Select a folder that contains the document you want to edit.

2.   Right-click the document you want to edit and select Edit from the menu.

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

3.   Click **Save** to commit the changes.

4.6.4.8. Export nodes

Nodes can be exported into either **.xml** or **.zip** file types.

Procedure 4.24.

1.   Select the node that you want to export

2.   Select the **Admin** tab.

3.   Click the Action bar to show the **Export Node** form:

Table 4.8.

Fields	Details
Path to Export	The path of the node being exported. This field will be prepopulated.
Format	The format of the original node.
Document View	Each node is a tag and properties of that node are considered to be elements of that tag.
System View	Each node and each property of that node is included in a different tag.
Zip	If this field is checked, the node will be exported as a **.zip** file.

4. Click **Export** and choose a location to save the exported file.

> ### Exporting Versioned nodes
>
> The **Export Node** form will offer an **Export version history** button if the node being exported, or any of its child nodes, is versioned.
>
> This action exports all of the node's version history.

4.6.4.9. Import Nodes

Nodes that are in the **.xml** file format can be imported in to the JCR Explorer system.
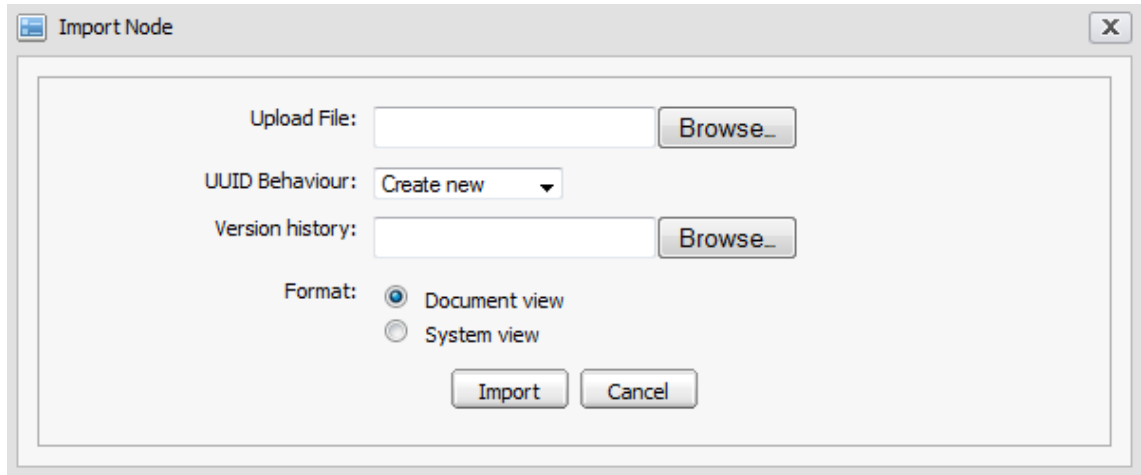
Procedure 4.25.

1. Select the location that you want to import the new node to.

2. Select the **Admin** tab.

3. Click

. The **Import Node** form appears.

4. Click **Browse** next to the *Upload File* field and navigate to the file you want to import.

5. Click

to upload the file.

6. Select the **UUID** from the drop down menu:

Create new
A new UUID will be created for the new node.

Remove existing
The new node will be created in the selected path with the UUID it was exported with.

Replace existing
The imported node will replace the existing node and UUID.

Throw Exception
This option will display an alert informing you if you can not import the file.

7. Click **Browse** next to the *Version history* to select a version to import and click

to upload it.

8. Select a format.

9. Click **Import** to import the chosen version of the selected file.

4.6.4.10. Manage Actions

4.6.4.10.1. Add an action

Procedure 4.26.
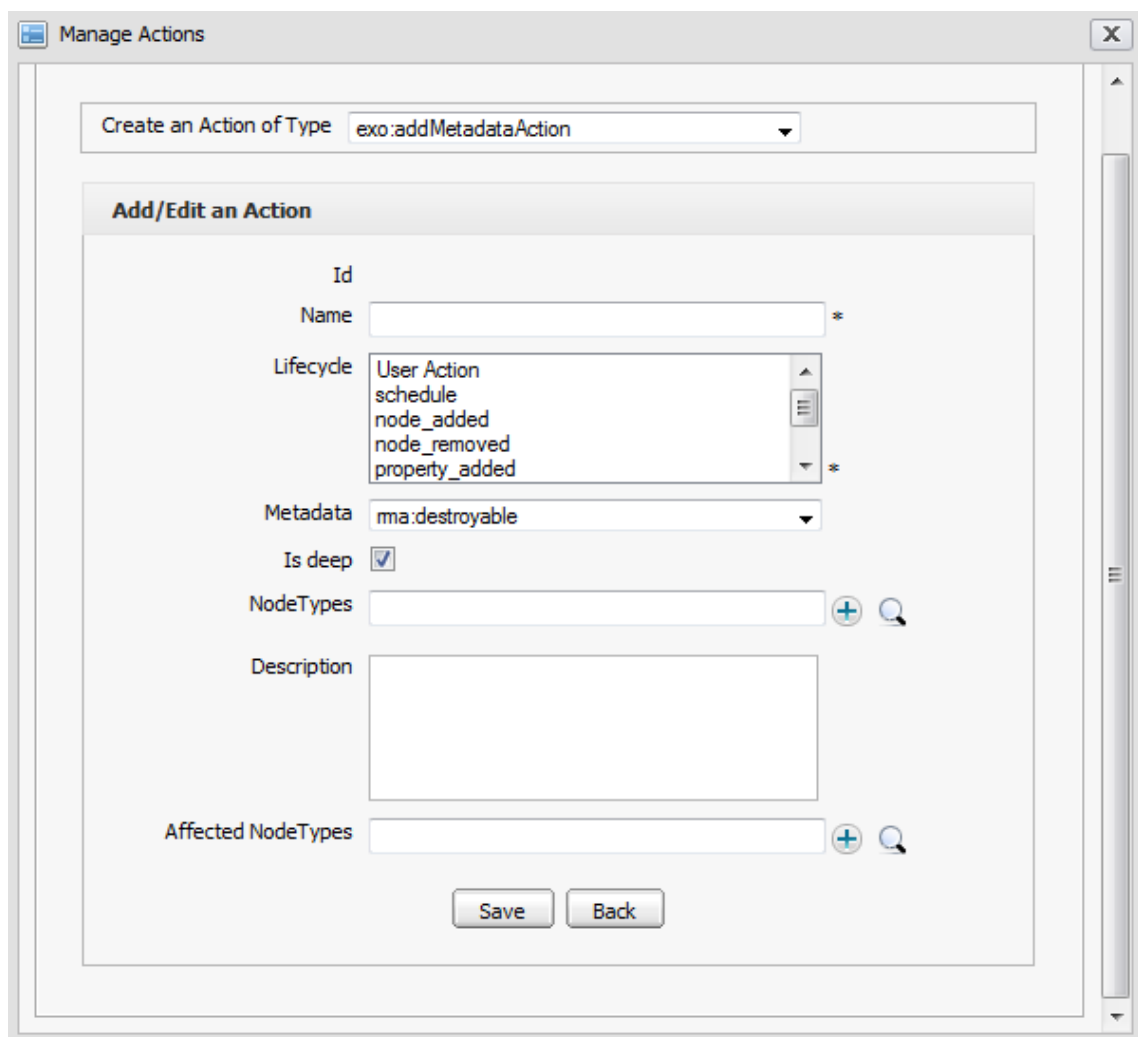
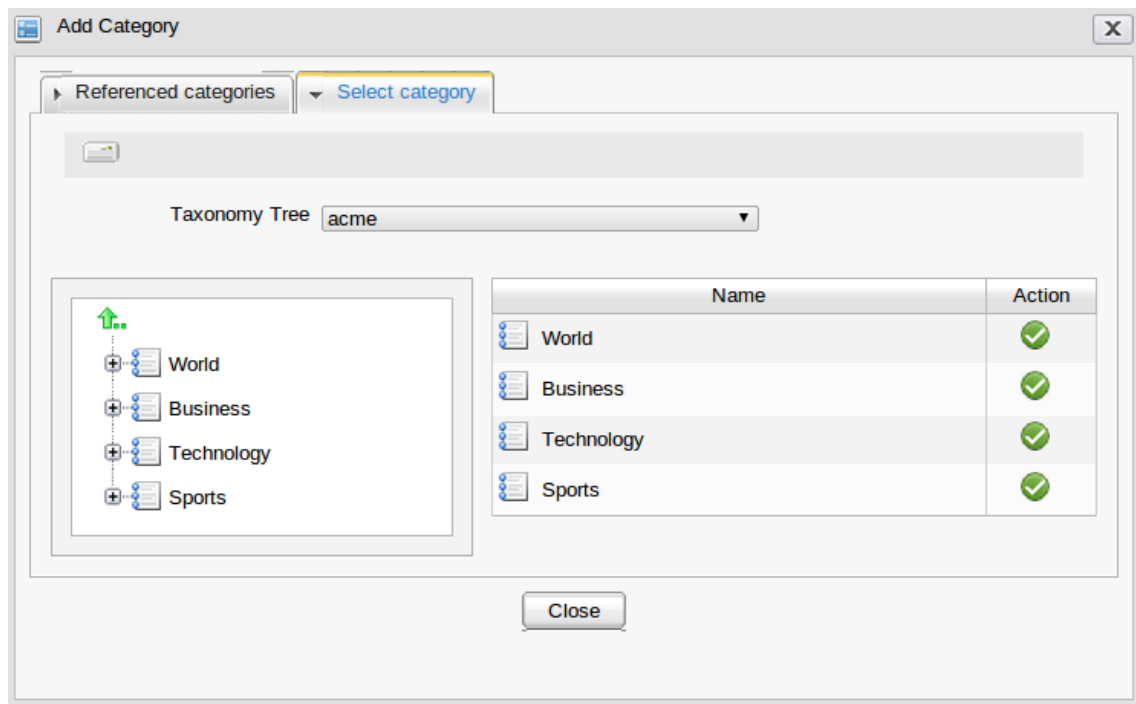1. Select the node you want to add an action to.

2. Select the **Admin** tab.

3. Click   on

   .

   The **Manage Actions** form will appear.

4. Select the **Add Actions** tab.

5. Click   on

    and select the type of action from the drop down menu

Table 4.9.

Field	Details
exo:action	This action is not supported.
exo:AddMetadataAction	This action adds metadata
exo:autoVersioning	This action automatically adds a version.
exo:createRSSFeedAction	This action creates an RSS file.
exo:enableVersioning	This action enables versioning.
exo:getMailAction	This action fetches mail
exo:sendMailAction	This action sends mail.
exo:taxonomy/Action	???
exo:transformBinaryTo TextAction	This action converts *.pdf* or *.doc* file types to plain text.

6. Complete the required fields in the form for the selected action.

7. Click **Save** to commit the action.

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

Once an action is added to a node it is automatically added to any child nodes of the selected node.

> **i**
>
> ## Actions in menus
>
> Not all actions are listed in a nodes right-click menu. Some will be performed immediately when that action is added.

4.6.4.10.2. View Actions

Procedure 4.27.
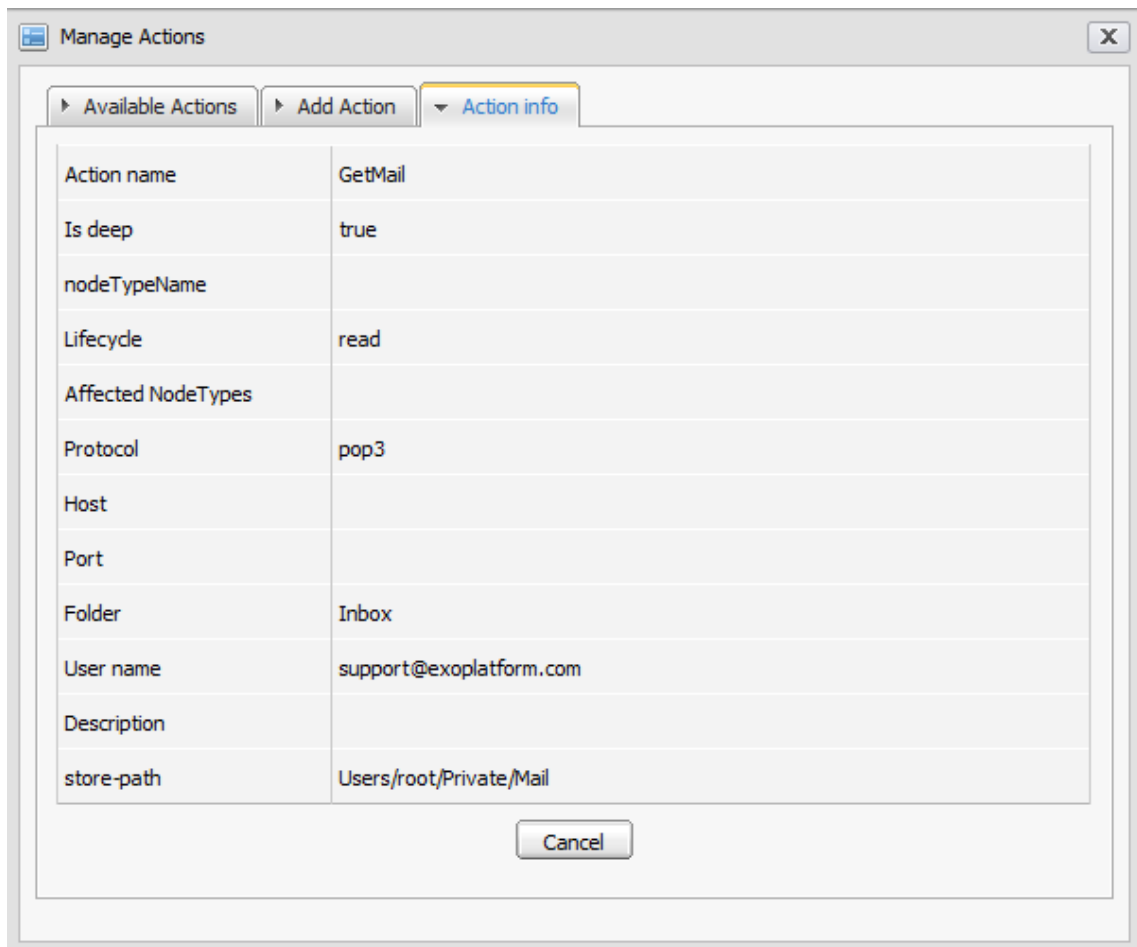
1. Open the **Manage Actions** form and select the **Available Actions** tab.

2. Click   the

    icon that corresponds to the action you want to view.

The details will be displayed in the **Action info** tab:
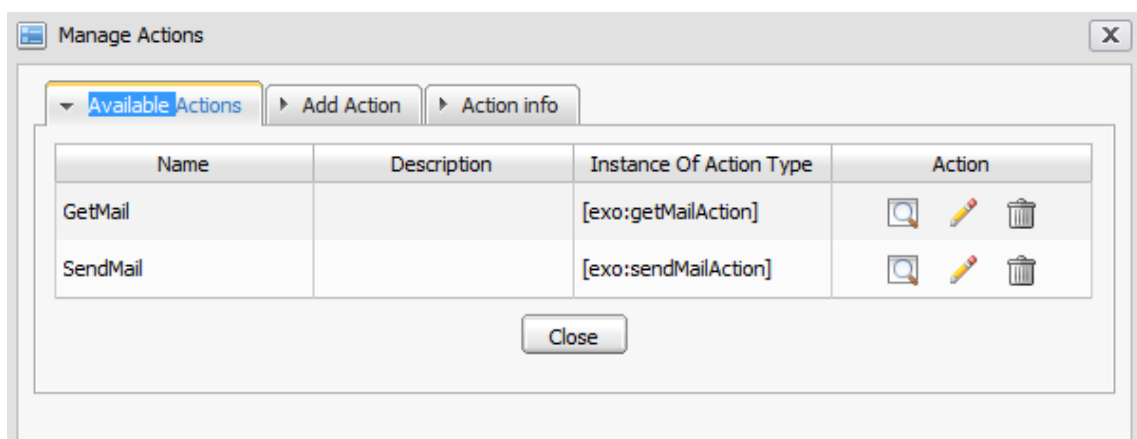
4.6.4.10.3. Edit an action

Procedure 4.28.

1. Open the **Manage Actions** form and select the **Available Actions** tab.

2. Click   the

   icon that corresponds to the action you want to modify.

3. Edit the properties in the **Actions form**:

4. Click **Save** to commit the changes.

4.6.4.10.4. Delete an action

Procedure 4.29.

1. Open the **Manage Actions** form and select the **Available Actions** tab.

2. Click   the

icon that corresponds to the action you want to modify.

3. Click **OK** on the confirmation dialog box to delete the action of **Cancel** to quit.

4.6.4.11. Manage Auditing

This function logs property changes in nodes.

Procedure 4.30.

1. Select a node.

2. Select the Details view and the **Info** tab on the Action bar.

3. Click

. The **Activate Auditing** message appears.
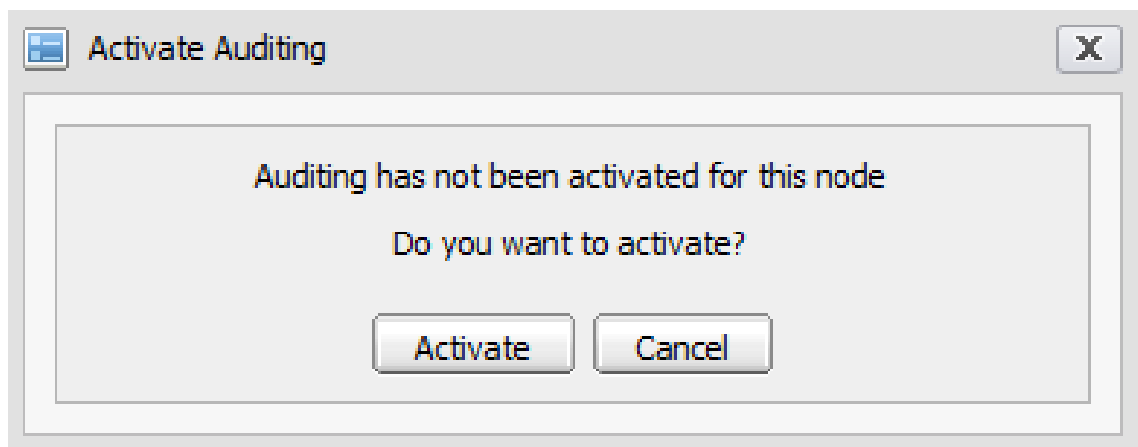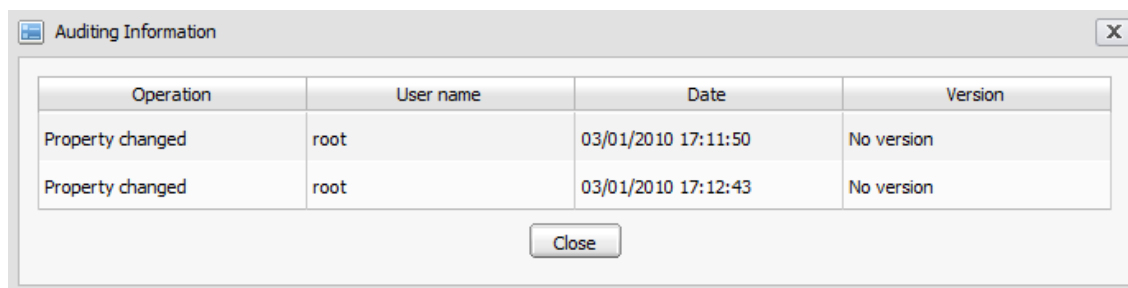
4. Click **Activate** to activate auditing on the selected node.

5. Click

again to view audit information for the selected node.

The **Auditing Information** list appears.
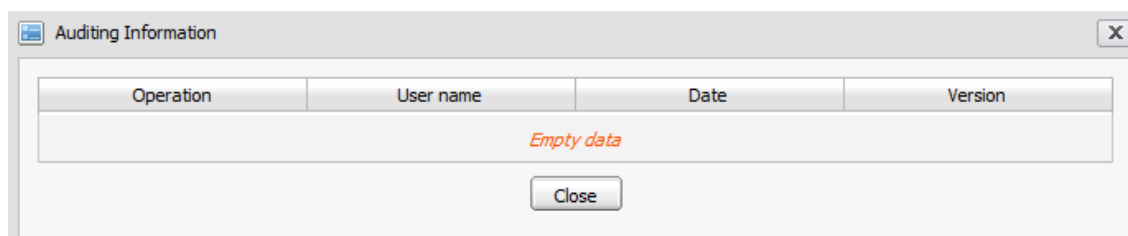
If the node has no audit information the form will appear like this:

4.6.4.12. Manage Categories

4.6.4.12.1. Add a category for a node

You can add categories to document type nodes only:

Procedure 4.31.

1. Select the node that you want to add a category to:

2. Select the **Admin** tab.

3. Click on

   .

   The **Add category** form appears.

4. Select the **Select category** tab to show the available categories.

5. Click

to add the corresponding category to the node.

Categories that have been added to a node are listed in the **Referenced categories** tab of the **Add categories** form.

All nodes belonging to a category can be viewed by doing the following:

Procedure 4.32.

1. Go to the drive that contains the category you have added. There will be a list of categories available.

2. Select the category you want. The documents in that category will be listed.

Copy/pasting nodes

When copy and pasting a node in a drive, a new node with the same content will be created with a different name.

When copy and pasting a node in the category tree, a reference to the original node will be created. This reference is a link rather than a copy. This feature preserves disk space.
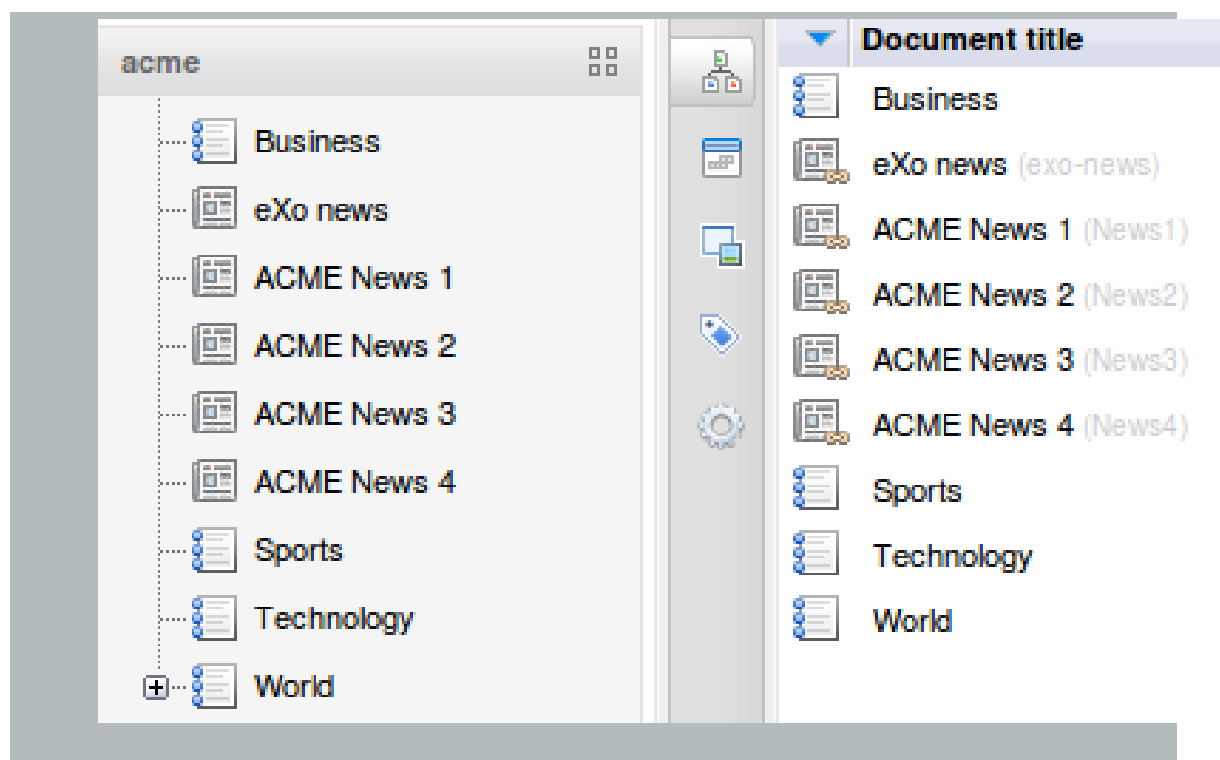
4.6.4.12.2. Delete a Category

Procedure 4.33.

1. Select a categorized node.

2. Click   the

    icon.

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

4. Click   the

    that corresponds to the category you want to delete.
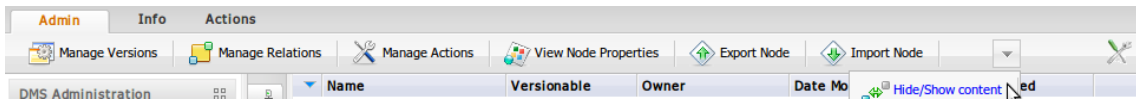
4.6.4.13. Show/Hide Content

Nodes can be hidden or revealed as desired.
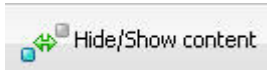
Procedure 4.34. Hide a Node

1. Select the node you want to hide.

2. Select the **Admin** tab.

3. Click

on the Action bar to hide the node.

A message box will appear with a confirmation that the node has been hidden.

4. **Show a Node**

To   reveal   a   hidden   node,   click
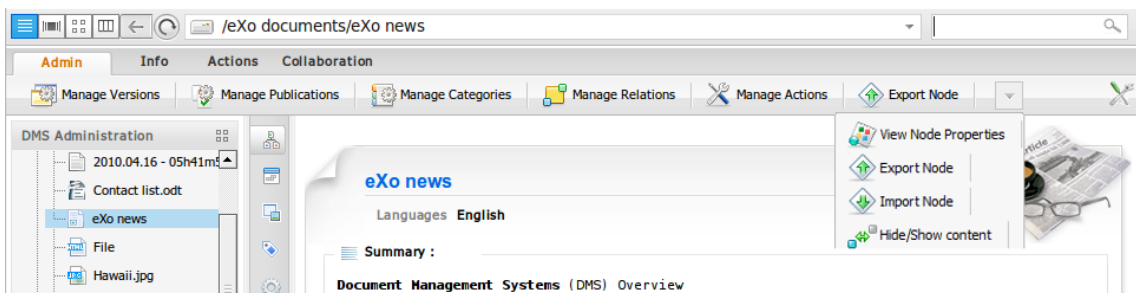
again.

4.6.4.14. Manage Publications

This function is used to manage node publication.

Procedure 4.35.

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

2. Select the **Admin** tab to show administration actions in the **Action** bar:
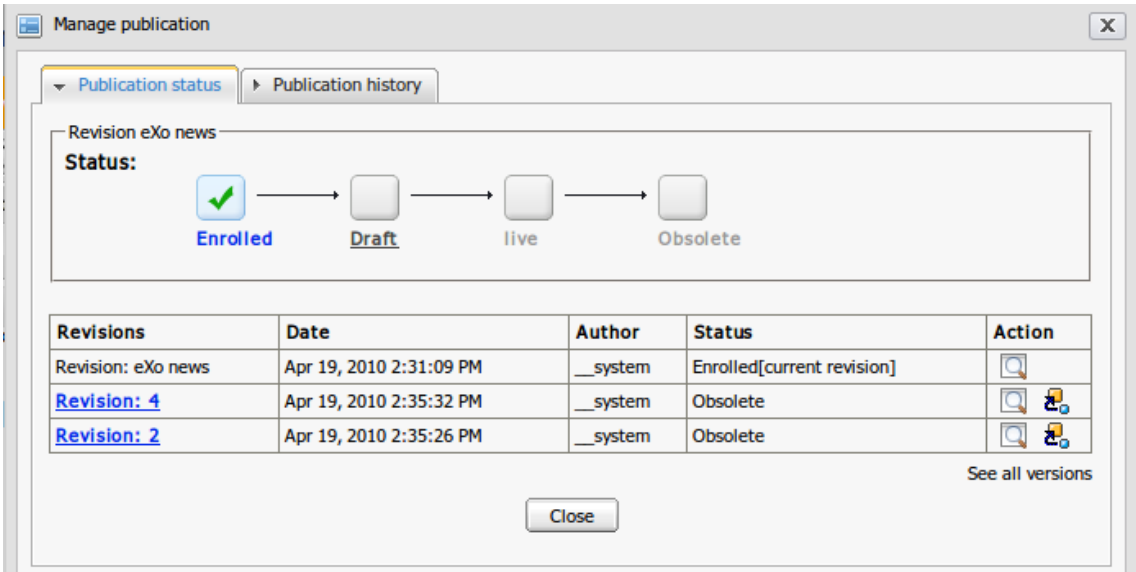
3. Click

on the actions bar.

The **Manage Publications** form appears:

The **Publication status** tab displays some basic information and the current state of the selected node.

4. Click

to view the content of the node or click

to restore a version (refer to *Section 4.6.4.16, "Manage Versions"* for information about versioning)

5. Select the **Publication History** tab to view the nodes publication history.
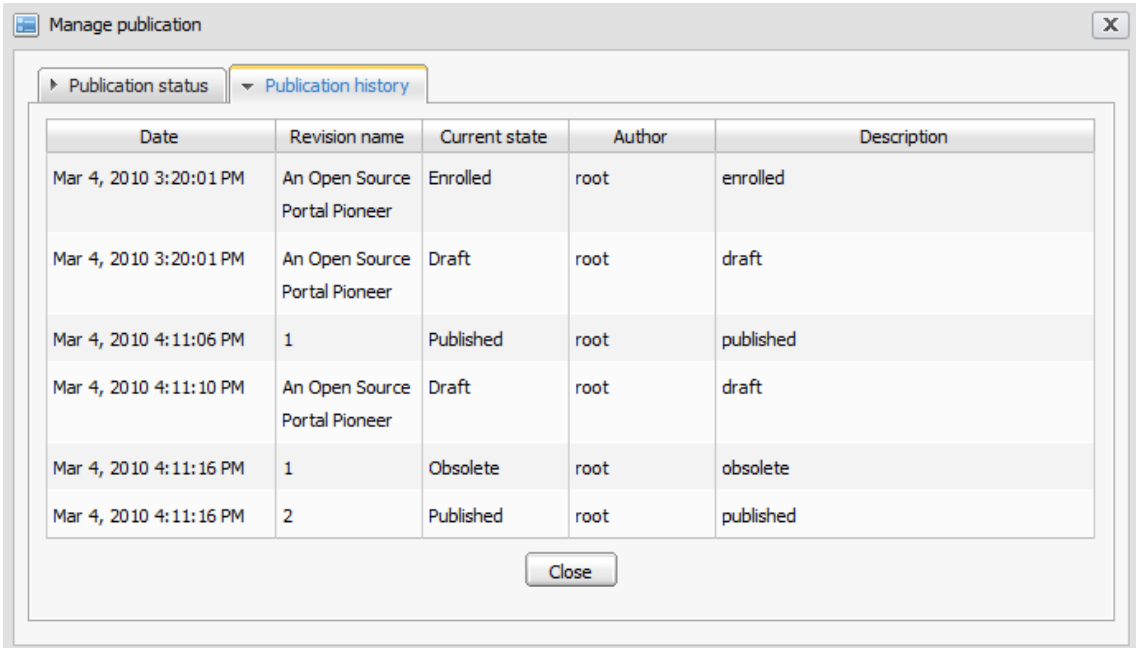
6. Click save to commit any changes made.

4.6.4.15. Manage Relations

You can use this function to create relationships between nodes

4.6.4.15.1. Add a relation

Procedure 4.36.

1. Select the node you want to add a relations to.

2. Select the **Admin** tab.

3. Click   the

   .

   The **Add relation** form appears.

4. Select the **Select relation** tab to see a list of other documents.

5. Click   the

   that corresponds to the document(s) that relate to the document selected in the **Step 1**.

   Documents linked to the original via a relation will be listed in the **Relation List** tab.

   Relation Rules

   • Relations can only be added to document and uploaded file node types

   • A node cannot have a relation to itself.

4.6.4.15.2. Delete a relation

Procedure 4.37.

1. Select a node that has links to related documents.

2. Click   on

   .

3. Select the **Relation List** to view the relations for the selected node.

4. Click

    corresponding to the relation you want to remove.

5. Click **OK** on the confirmation message to delete the relation.

    The related document will be removed from the list.

4.6.4.15.3. View Relations

Procedure 4.38.

1. Select a node that has links to related documents.

2. Click the relation button on the side panel:
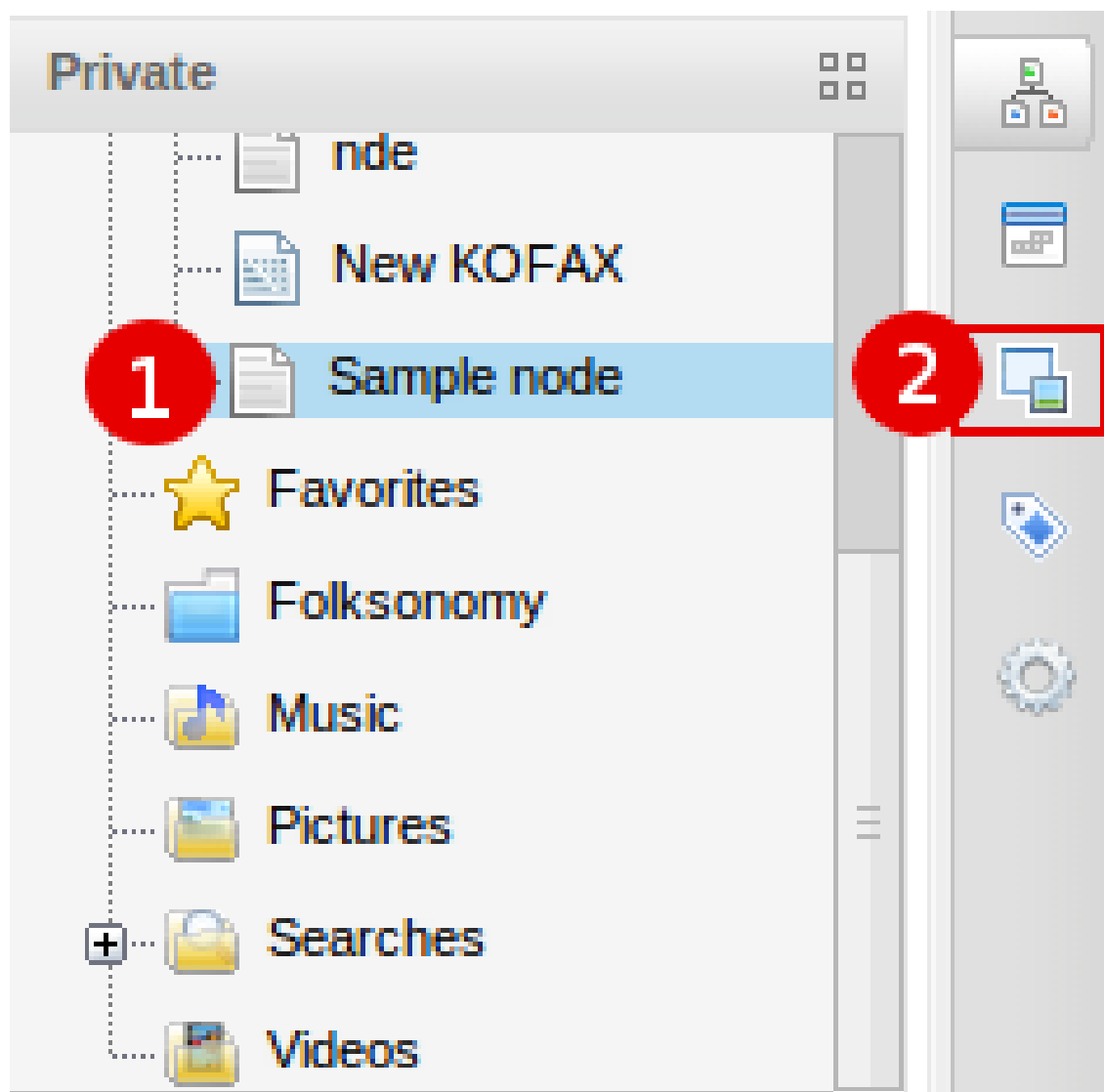
All nodes related to the selected node will be displayed in the left pane:
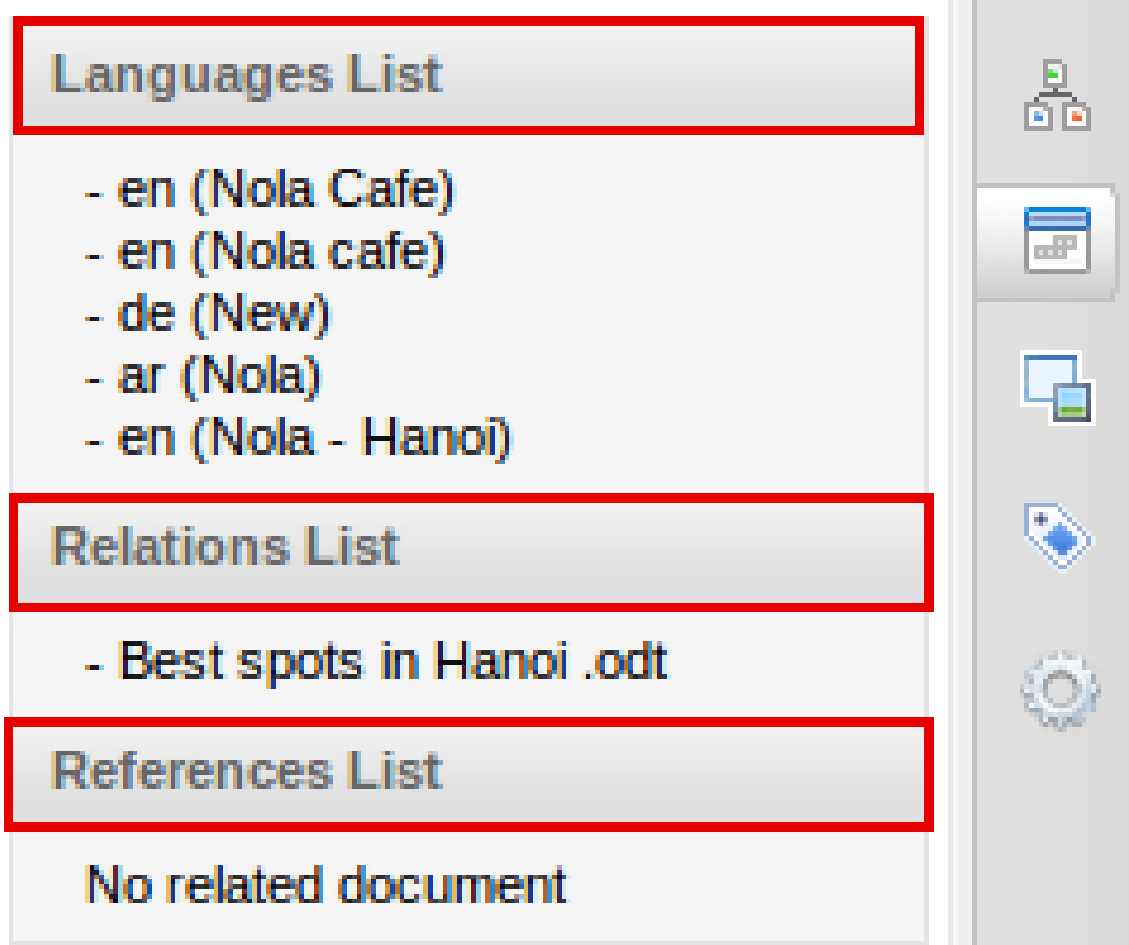
3. Click on the name of the related node to view the document.

4.6.4.16. Manage Versions

4.6.4.16.1. Add versions for nodes

Procedure 4.39.
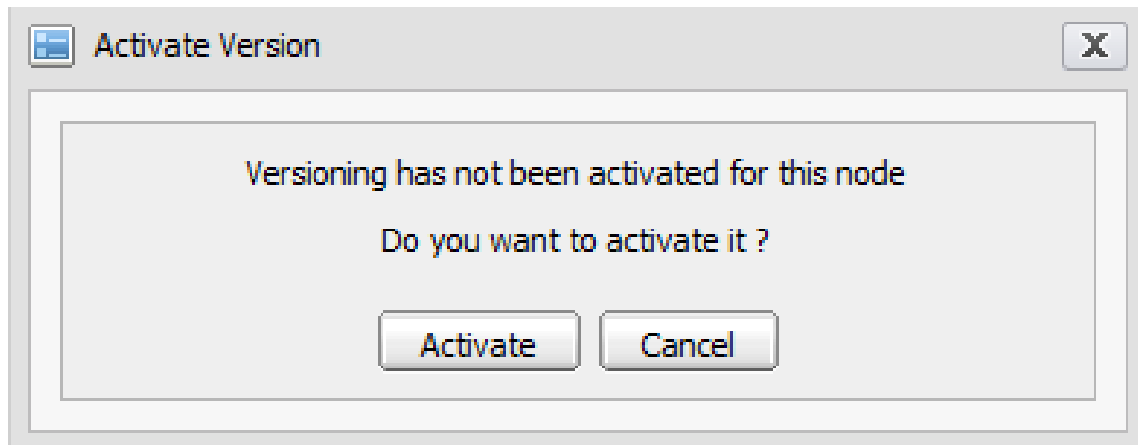
1. Select a node to add a version to.

2. Select the **Admin** tab to show available administration actions:
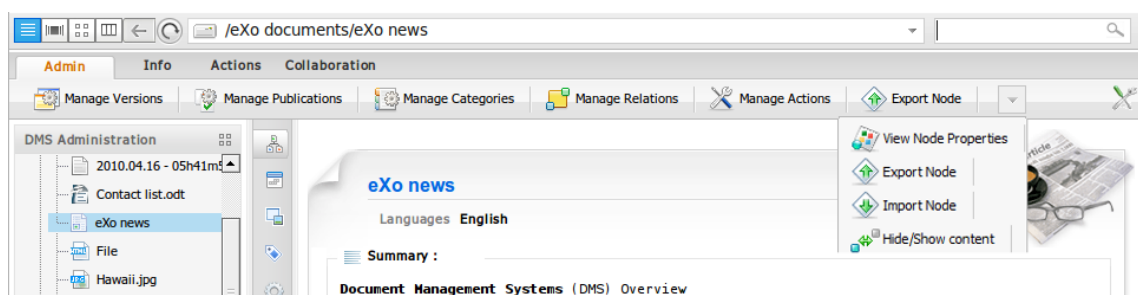
3. Click

.

The following message box will appear:
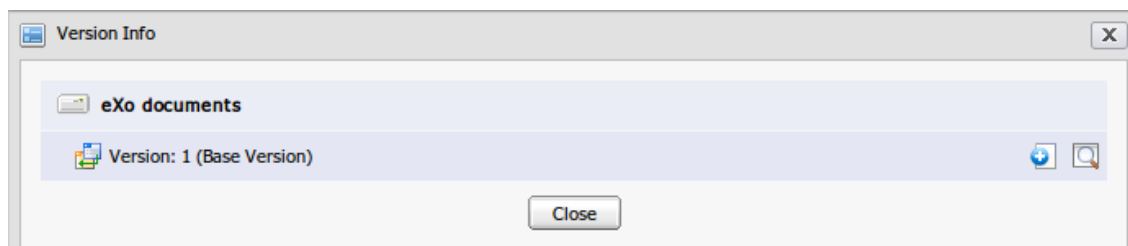
4. Click **Activate** to activate a version for the node.

5. Right click the selected node and select **CheckIn** from the menu:

Private

6. Click

Manage Versions
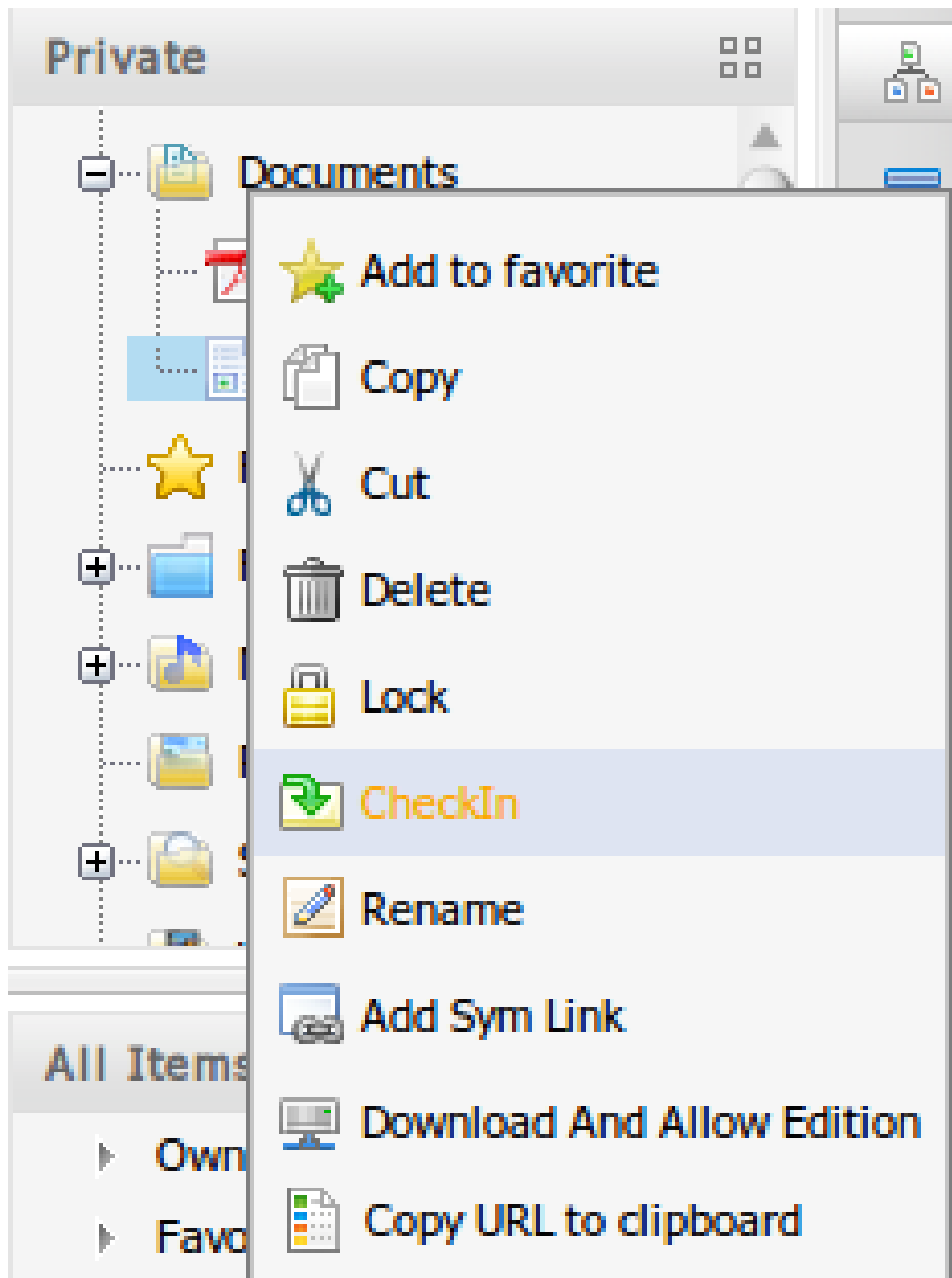
again to open the **Version Info** window.

The node selected in step one has been added as the *Base version*.

7. Right click the node again and select **Check out** to obtain a version of this node.

> **i**
>
> No actions (copy/cut/rename) can be taken on a node in **Check In** status. You must check it out before you can perform any actions on it.
>
> If you want to add more versions for a node, right click selected node above and select **Check In** and then **Check Out**

4.6.4.16.2. Adding and Removing labels for Versions

Procedure 4.40. Adding a label
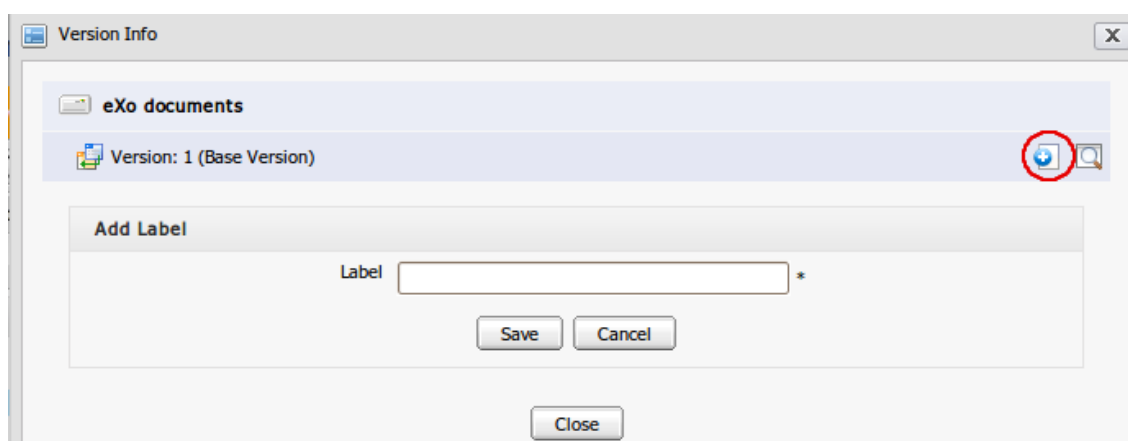
1. Select a versioned node.

2. Click

   .

3. Click   the

   on the **Version Info** window to show the **Add label** field under the version list.

4. Enter a value into the **Label** field.

    The label must be unique and can not use special characters such as @, #, $.

5. Click **Save** to submit the new label.

Procedure 4.41. Removing a label

1. Select a versioned node that has at least one label.

2. Click

    .
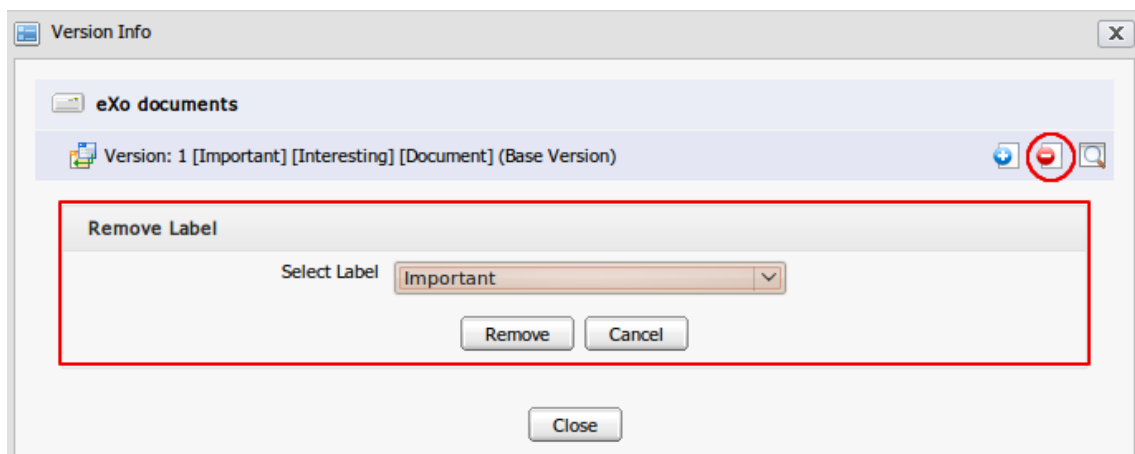
3. Click   the
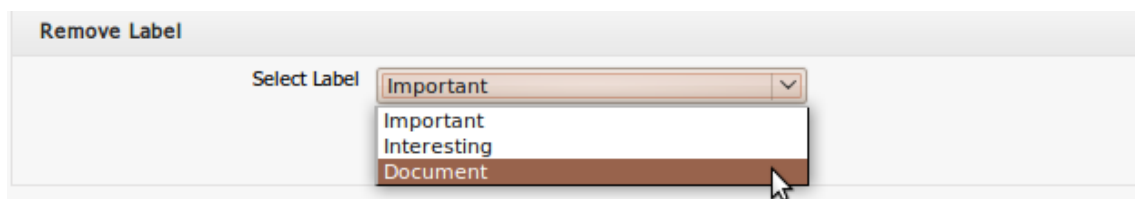
    on the **Version Info** window to show the **Remove label** field under the version list.

4. Select the label you want to remove from the drop down menu:

5. Click the **Remove** button to remove the selected label.

4.6.4.16.3. View versions

Procedure 4.42.

1. Select a versioned node.

2. Click

.

3. Click

   to see the current versions of the selected node.
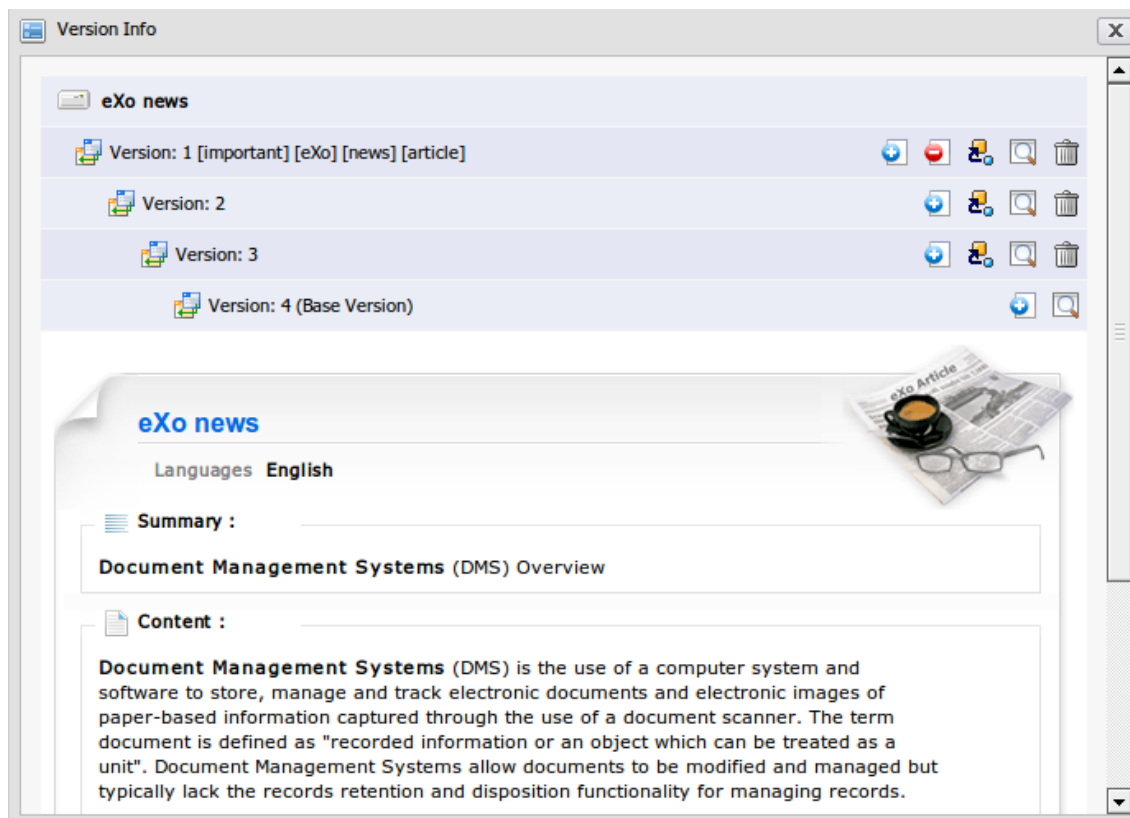
Folder Nodes

Version viewing is not supported on folder nodes.

If   you   click

while the selected node is a folder, a message to this effect will appear.

4.6.4.16.4. Restore versions

Procedure 4.43.

1. Select a node that has at least two versions stored.

2. Click

.

3. Select the version that you wish to restore as the base version.

4. Click
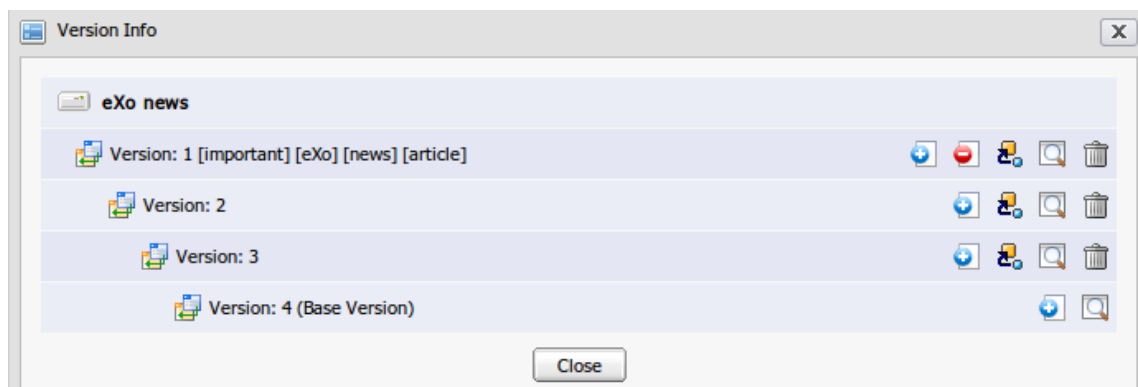
to restore the selected version
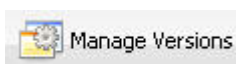
4.6.4.16.5. Delete versions

Procedure 4.44.

1. Select a node with at least two versions:

2. Click

.

3. Click   the

icon that corresponding to the version you want to delete.

A confirmation message will appear.

4. Click **OK** to delete the version or **Cancel** to quit.

Base Versions

You cannot delete a base version.

4.6.4.17. Multi Language

This function is used to support users to add multiple languages for a document. Each document can be displayed in many languages.

Procedure 4.45.

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

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

3. Click

on the **Action** bar.
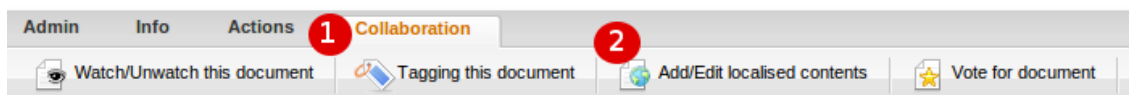
The **Multi-language** form will appear.
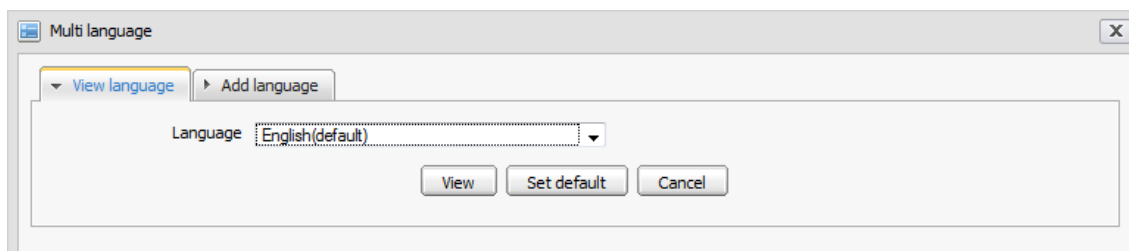
The **View language** tab contains a list of all languages. The default language for the document will be automatically populated.

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

this area is shown differently, depends on the filetype.

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

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

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

6. Click **Save**, you will be returned to the **View language** tab. Your selected language is now added to the **Language** field:
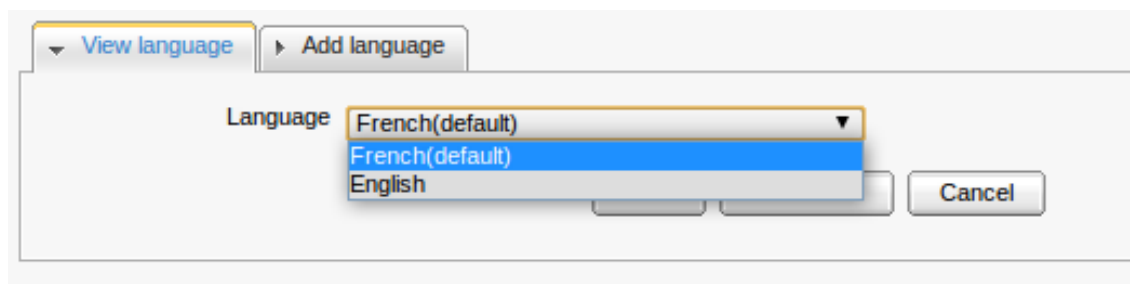
You can view this document in new added language by selecting the language from the language drop-down list then click the **View** button.

To view the languages list of a document, do the following:

Procedure 4.46.

1. Select a document that you want to view the language list then click the **Relation** button on side panel:
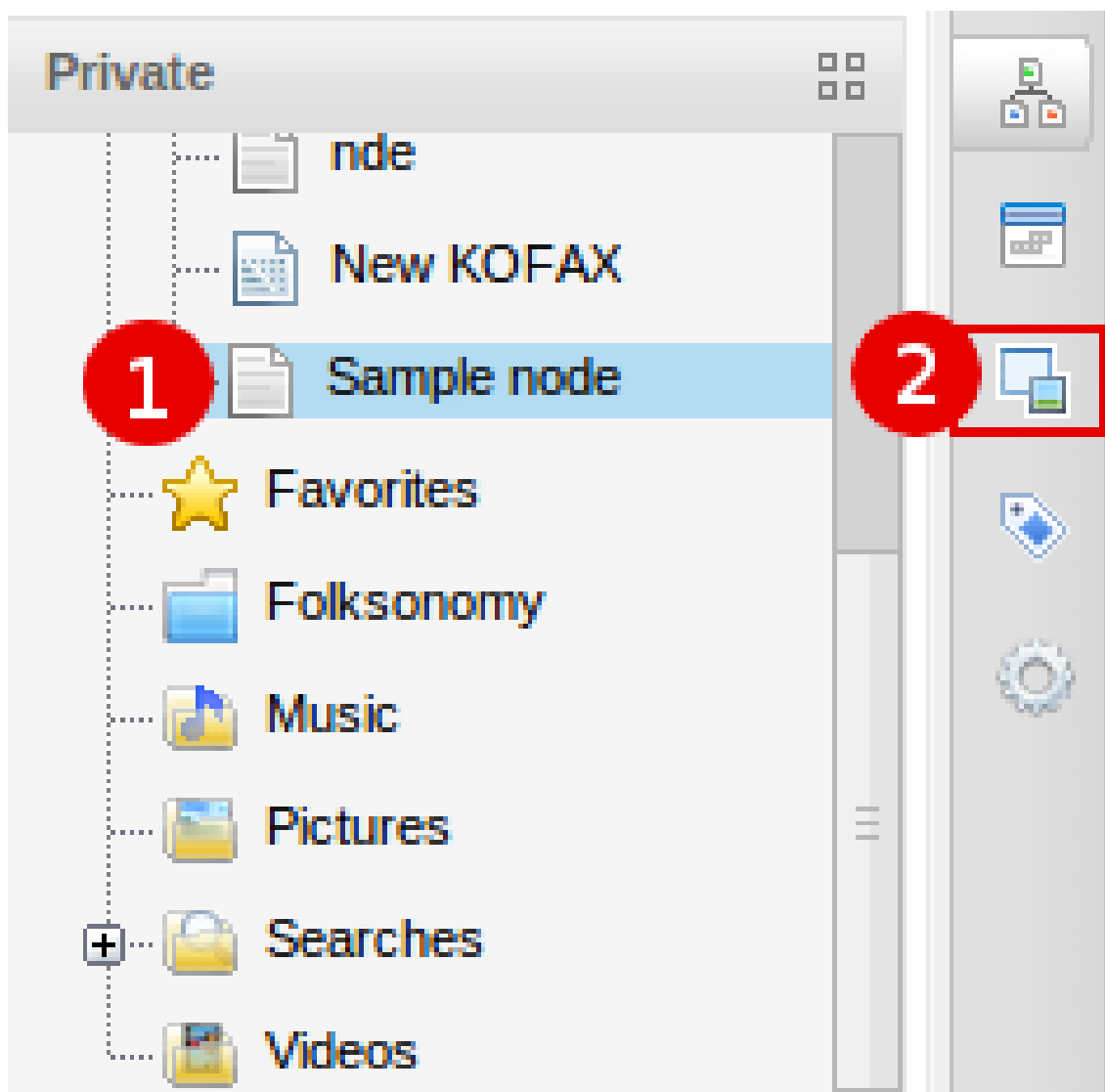
2. The list of language (and all related documents) will be displayed on the left panel:
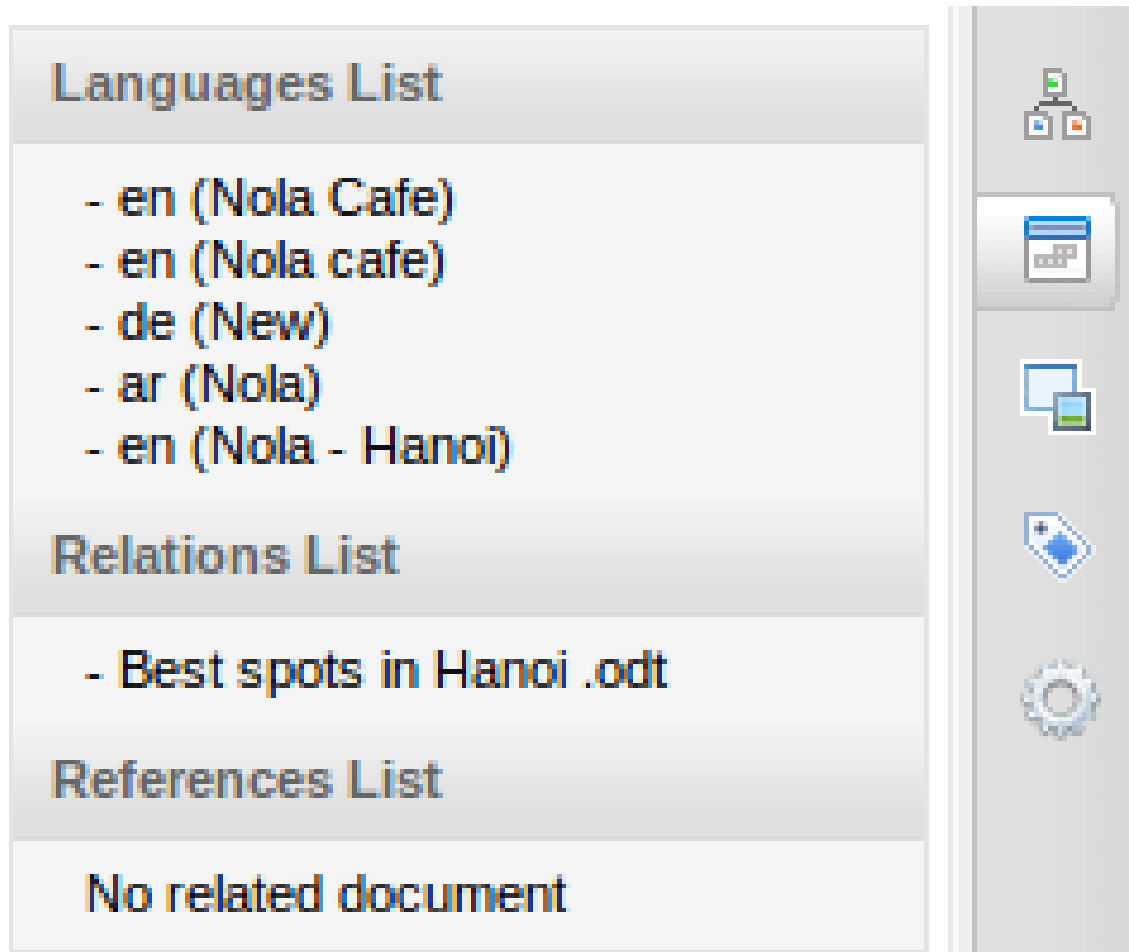
You can view the document in the new language by clicking the corresponding link in **Languages List**.

For more details about **Relations**, refer to *Section 4.6.4.15.3, "View Relations"*.

> **Language Notes**
>
> You cannot add multiple languages for a **File Plan**.
>
> When a document is a sub-node of **File Plan**, you also cannot add language to it.

4.6.4.18. Overload Thumbnails

You can 'overload' a thumbnail image for a folder. Overloading allows a folder to be represented by a thumbnail image, rather than a folder icon.

To overload a thumbnail:

Procedure 4.47.

1. Select the folder you wish to overload with a thumbnail image.

2. Click

   on the Action Bar.

   The **Add thumbnail image** form appears:
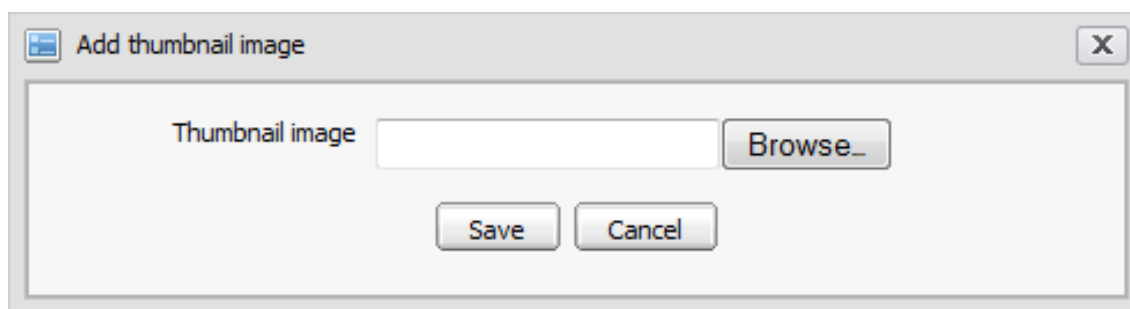
3. Click **Browse...** button to select the image to use as the display icon for the selected folder.

4. Click **Save** to commit the change. The node will be sotred in an *exo:thuumbnails* folder.
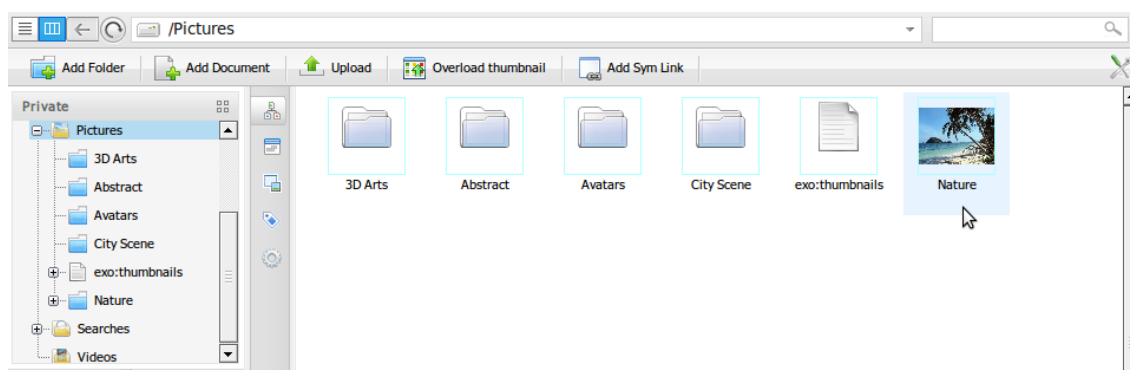
4.6.4.19. Approve Content

4.6.4.20. Publish Content

4.6.4.21. Request Approval

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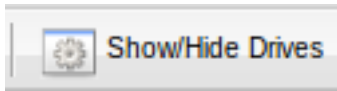
This function enables you to show or hide all the drives in Sites Explorer.

To   show   drives,   click
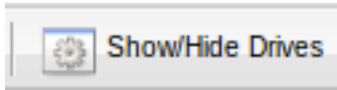
on the action bar.

To   hide   drives,   click

on the action bar again.

4.6.4.23. Show JCR Structure

This function allows you to view nodes in documents in a tree structure.

1. **Show the JCR structure**

    Select a document.

2. Select the **Info** tab.

3. Click

    .
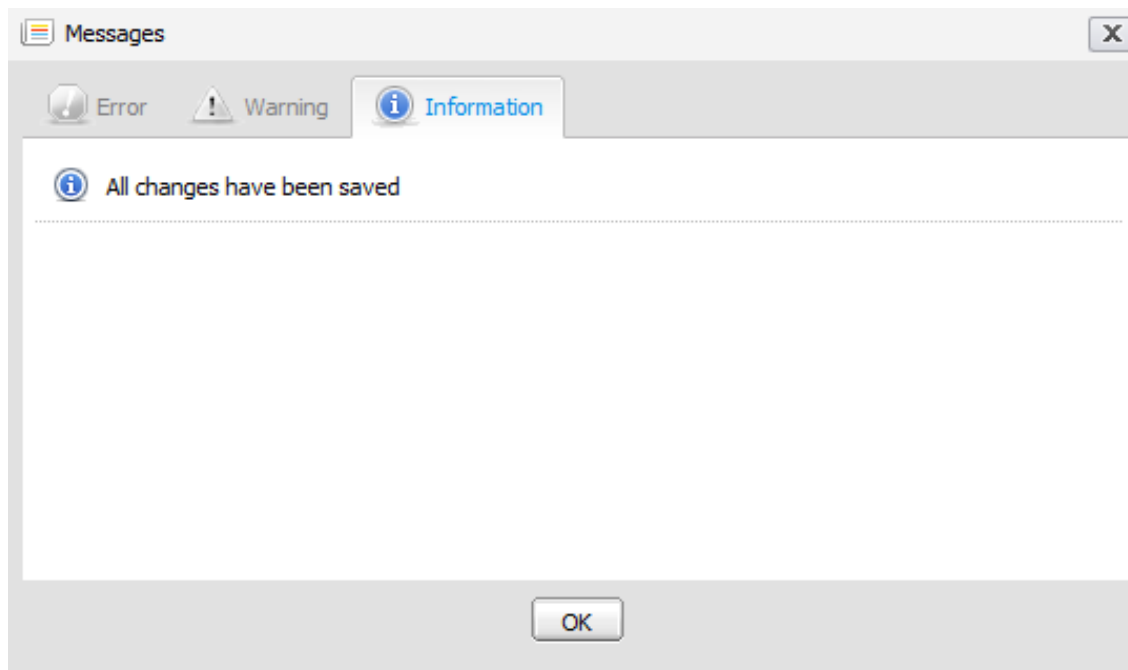
4. Click   the

    icon to save the view.

    The following information message will appear:

5. **Hide the JCR structure**

   Select a document that is showing the JCR structure.

6. Click

   again.

4.6.4.24. Tag Documents

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

Procedure 4.48. Add a new tag for a document

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

2. Chose the **Collaboration** tab then click

   on the Action bar. The **Tag Manager** will be displayed:

Table 4.10.

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

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

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

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

6. Click   the

🗑

to delete tags.

4.6.4.25. Upload files into folders

This function supports you to upload a file from your machine. All file types can be uploaded. The uploaded file's name must not include some special characters (! @ $ % & + [ ])
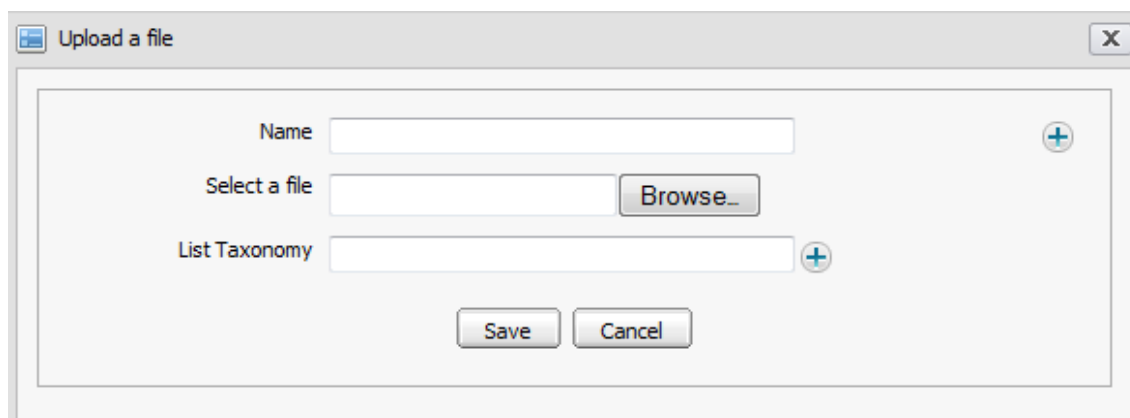
Procedure 4.49. To upload file into folder, do as follows:

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

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

3. Click

on the Action bar to open the Upload a file form:

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

If you want to upload multi files at the same time, click

to open more forms to upload more files:

The

enables users to delete the upload file form.

5. You can change the uploaded file by clicking the

icon and select **Browse**... again to select another one.

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

7. You can click the
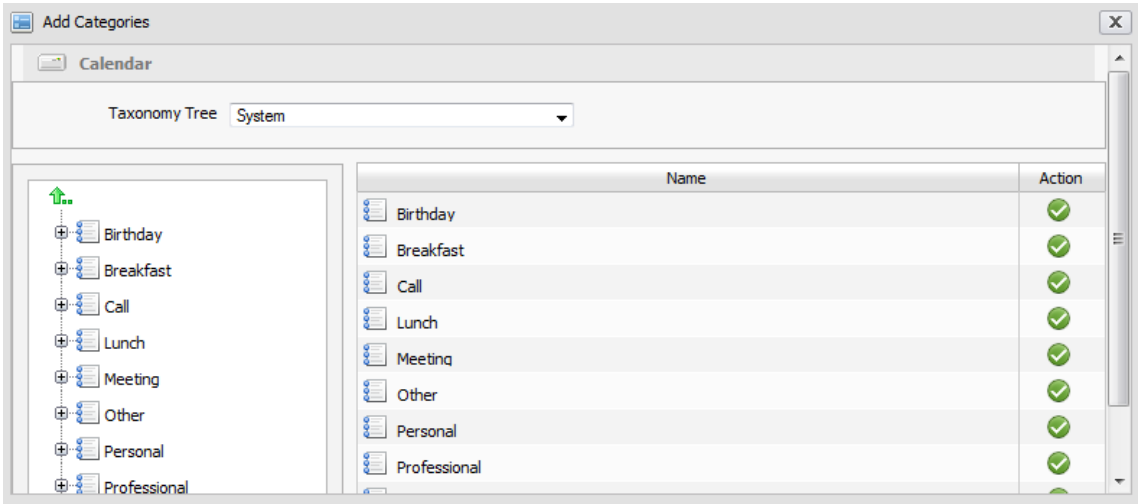
icon next to the List Taxonomy field to add categories for this file:
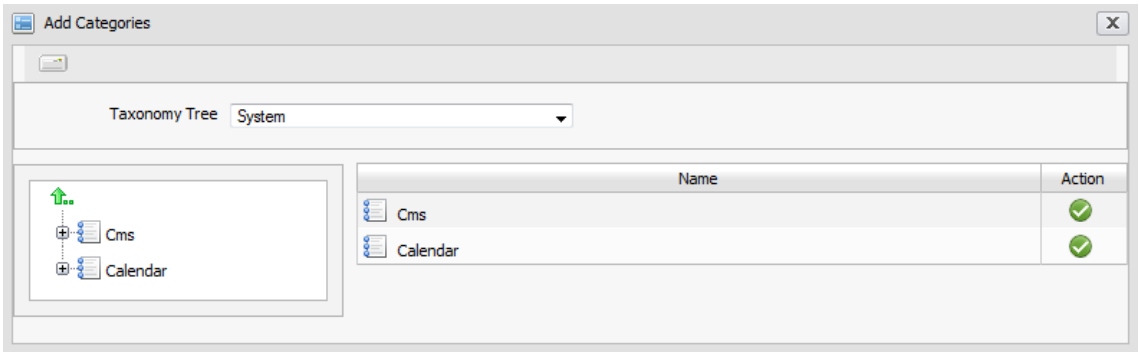
8. Select categories by clicking the

icon. Click '+ ' to open child nodes of categories.

 You can add more categories for a file by clicking the

icon again to open the Add Categories form.
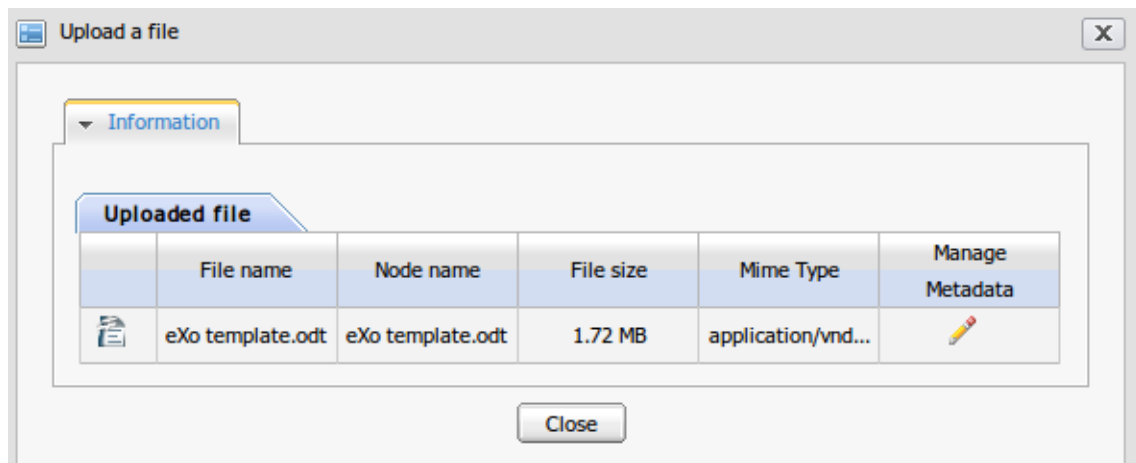
Click the

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

You also manage categories which added for files by using the **Manage Categories** function. See *Section 4.6.4.12, "Manage Categories"*.
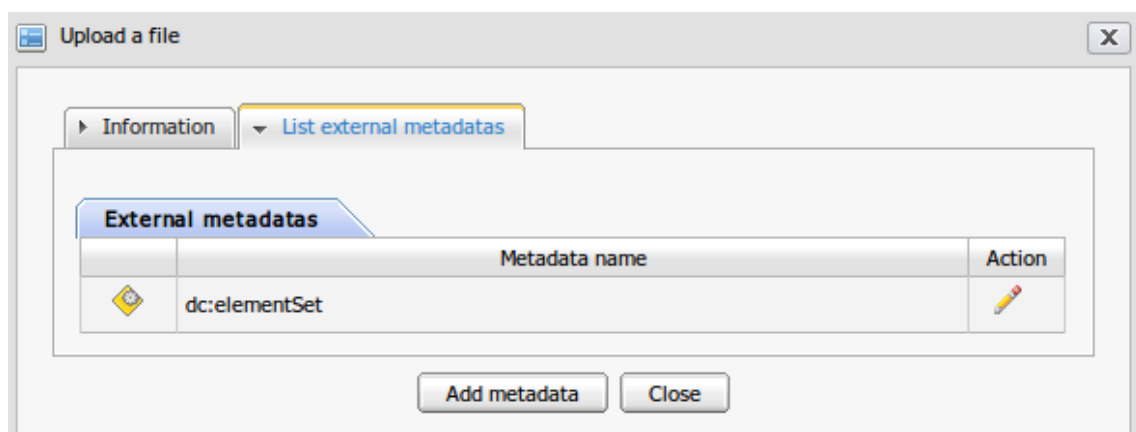
9. Complete uploading file by clicking Save.

10. After being saved, the main information of the uploaded file will be displayed:
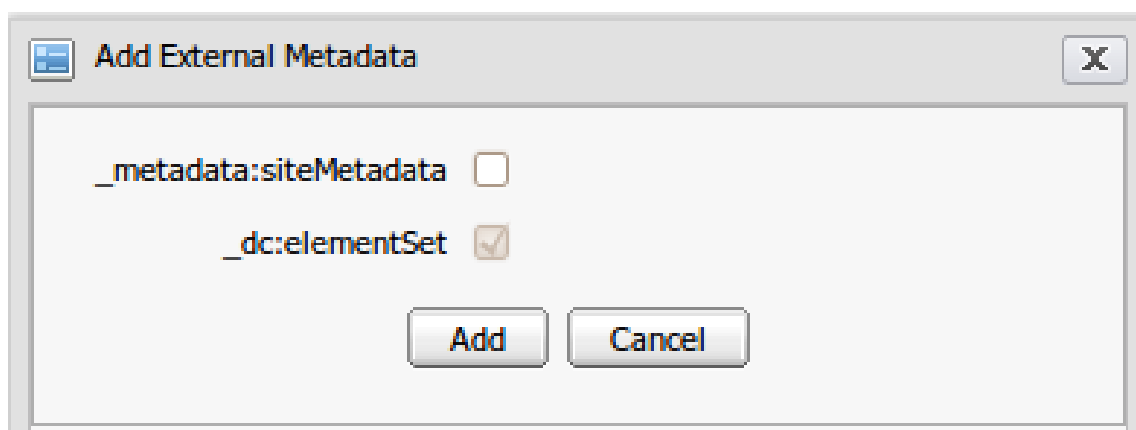
11. Click   the

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

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

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

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

    ![edit icon]

    .

15. Click Close to quit the Uploaded information form.

16. After being uploaded, the tree is displayed in the left panel:
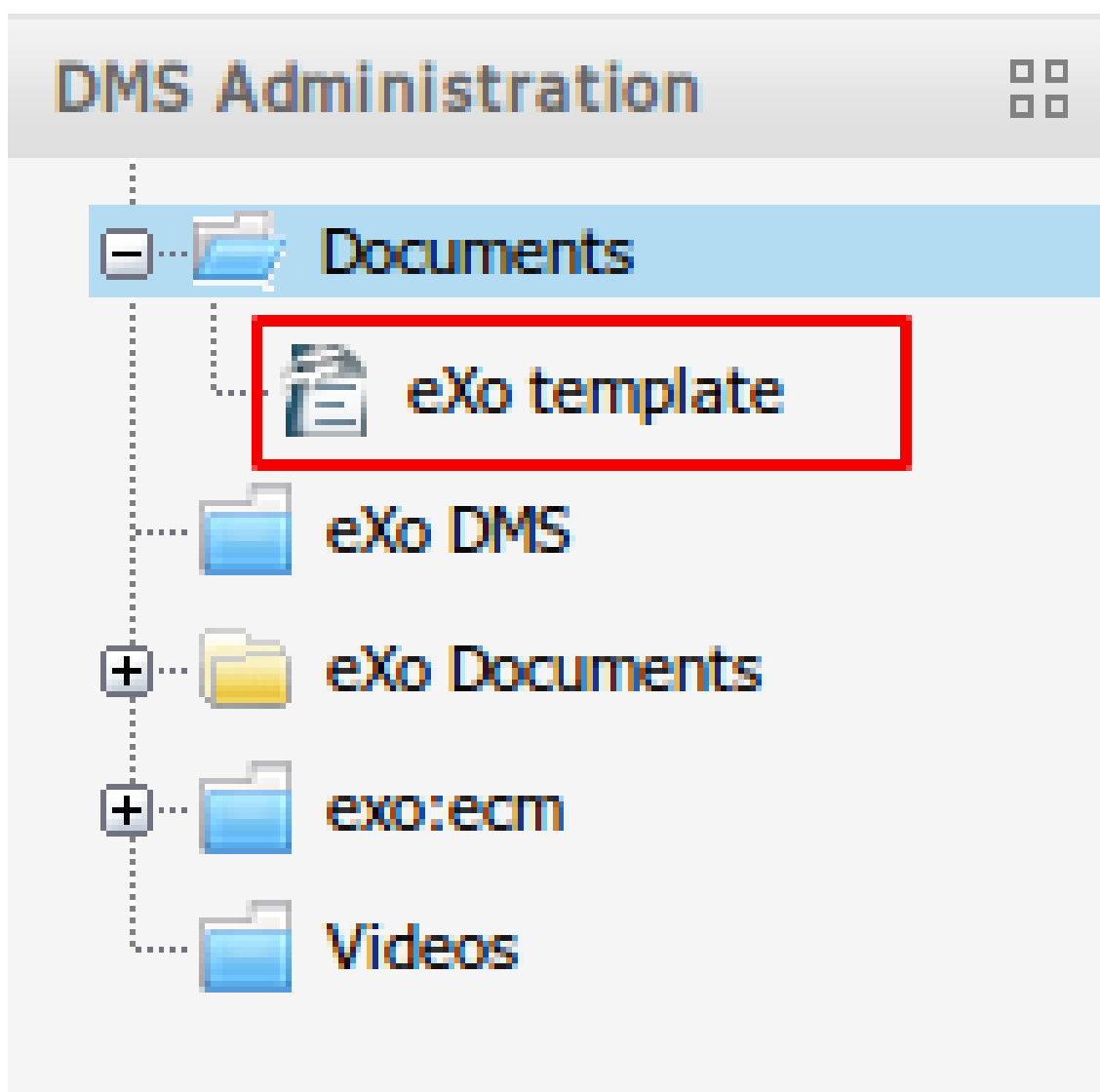
> ### File Size Limits
>
> The size of the uploaded file depends on the size limit of the uploaded file that you set up in the 'Edit' mode of Sites Explorer. If your file size exceeds the limit, a pop-up message will appears to alert you.

If you want to upload multi files at the same time, click

to open more forms to upload more files:

Click the **Browse** button to upload files that you want to. The

enables users to delete the upload file form.

4.6.4.26. View Metadata

This function allows you to view the metadata attached to File nodes, Podcast nodes, File Plan child nodes and uploaded file nodes (**nt:file** nodes)

Procedure 4.50.

1. Select an appropriate (**nt:file**) node.

2. Select the **Info** tab.

3. Click

. The **View Metadata** form appears:

4. Click the **Add/Edit** button at the bottom of the **View Metadata** form to add metadata.

5. Complete the desired fields in the **Add/Edit Properties** form. Click

to add further metadata.
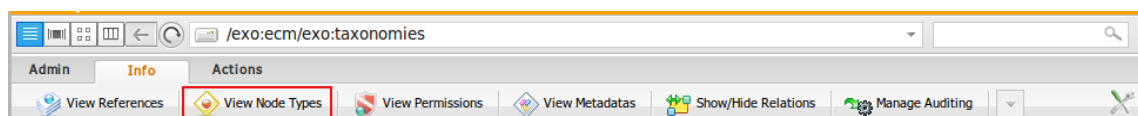
6. Click **Save** to commit the new metadata values.

4.6.4.27. View Node Types

To view detailed information about a node:

Procedure 4.51.

1. Select a node.

2. Select the **Info** tab to show contextual actions in the **Action** bar.

3. Click

to view detailed information about the selected node.

4. Click the tabs at the top of the form to view categorized information.

4.6.4.28. View Permissions

This function allows an administrator to manage the permissions for nodes.

Procedure 4.52. View Permissions

1. Select a node.

2. Select the **Info** tab on the Actions bar.

3. Click

    . The **Permissions Management** form appears.

With the **Permissions Management** form open you can perform the following actions:

Procedure 4.53. Add Permissions

1. **To add permission for specific users**

   Click   the

   button next to the **User Or Group** field.

   Click   the

   beside the users you want to grant permissions to.

2. **To select users from a specific group**
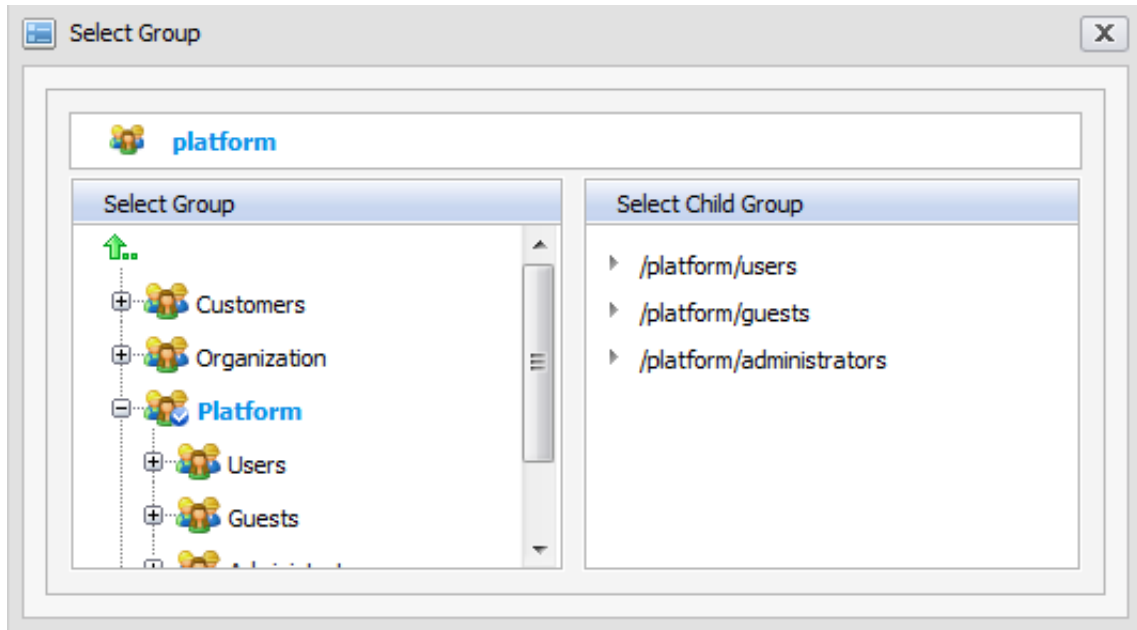
   Enter a group name in the **Group** field at the top of the form (for example; **/platform/users**). All users in the nominated group will be displayed.

   Or;

   Click   the

icon beside the **Group** field to open a form that lists groups and their sub-groups. Select a sub-group to add all users in that sub-group.

3. **To search for a user**

   Select an information parameter (User Name, First Name, Last Name, Email) from the drop down menu in the other field at the top of the page and enter the information into the text box. Click

   to search for users that match that information.

4. **To add permissions based on memberships**

   Click   the

   icon next to the **User Or Group** field.

   The **Select memebership** form that appears allows you to select users by membership. Select a group on the left pane and then select membership types on the right.

5. **To add all users/groups with read access**

   Click   the

   icon next to the **User Or Group** field.

6. Select the permission you want to grant the chosen users or groups by ticking the corresponding check boxes beside the rights you want to add.

7. Click **Save** to commit the changes. The new permissions will appear in the permissions table above.

Procedure 4.54. Edit Permissions

1. Select the permission of a user or a group in the table of list permissions.

2. Click   the

    icon.

3. Change the permissions as desired.

4. Click **Save** to commit the changed permissions.

Procedure 4.55. Delete Permissions
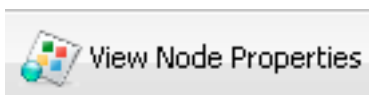
1. Select the permission of a user or a group in the table of list permissions.

2. Click   the

    icon.

3. Click **OK** in the confirmation message to remove the permission or **Cancel** to quit.

4.6.4.29. View Properties

This function allows users to review all the properties and values of a node. It can also nbe used to add values to a node.

Procedure 4.56.

1. Select the node that you want to review or add values to.

2. Select the **Admin** tab to show available actions in the **Action** bar.

3. Click   the
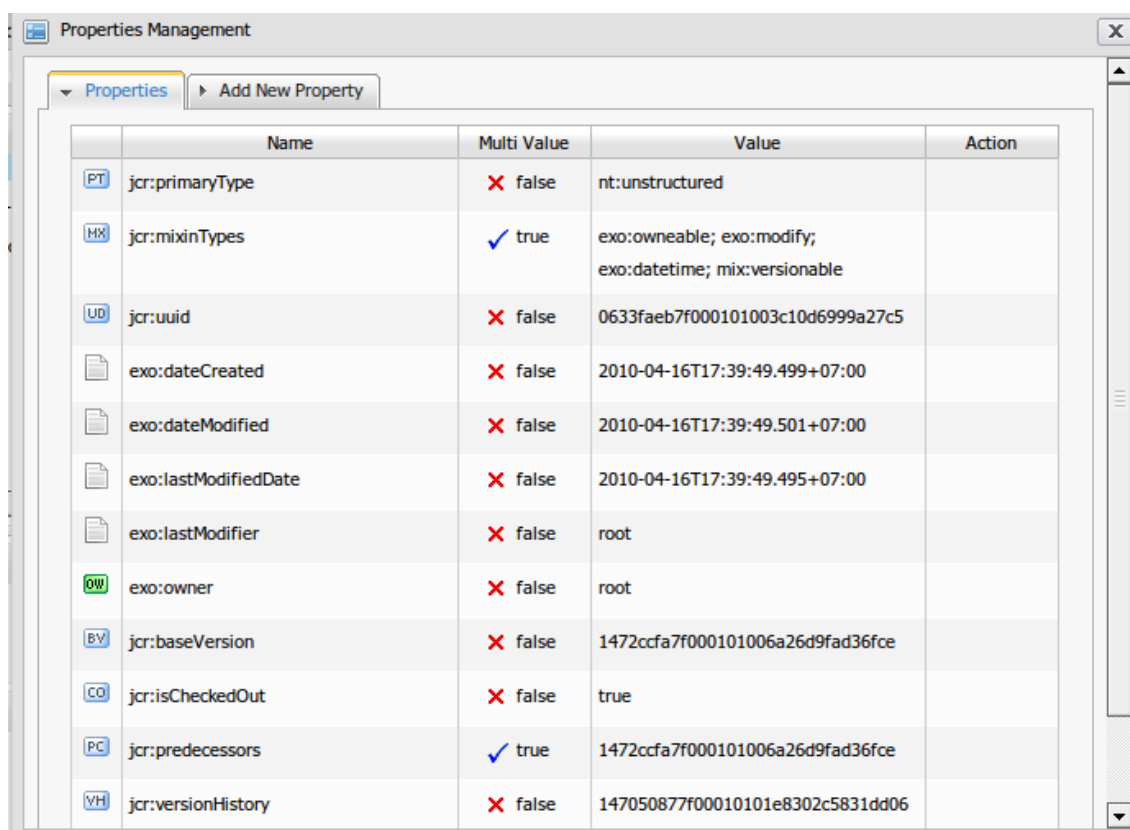
    button to show the **Properties Management** form:

    This form has two tabs:

    Properties
        This tab displays all properties and values for the selected node.

Select this tab to review the properties for the selcted node without making any changes.

Add New Property

This tab contains fields to add new properties to the selected node.

Select this node if you want to make changes to the properties of the selected node.

4. **To add new properties:**

Select the namespace for the property.

5. Enter a name for the new property in the **Name** field.

6. Select a **Type** for the property from the drop down menu:
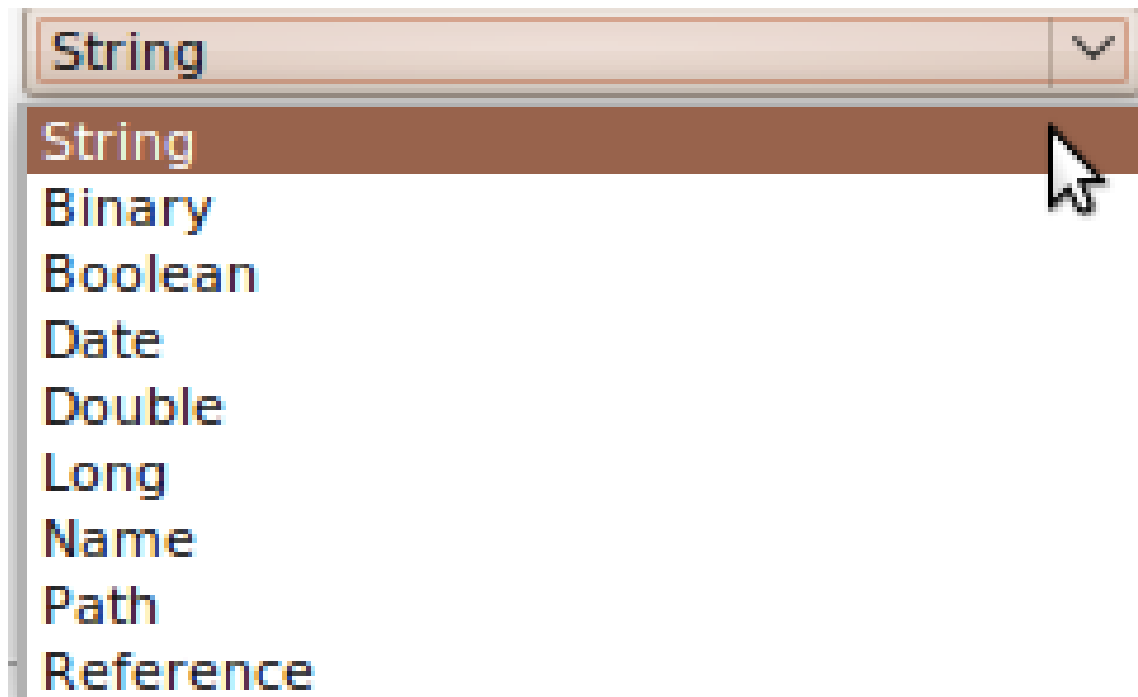
7. Enter a value for the property in the **Value**.

8. To add multiple new values, click the

    and repeat the above steps.

    To remove a value, click the

    .

9. Click **Save** to commit the new values or **Reset** to clear any modified fields.

After you commit new properties you will be returned to the **Properties** tab. The newly added values will be displayed.
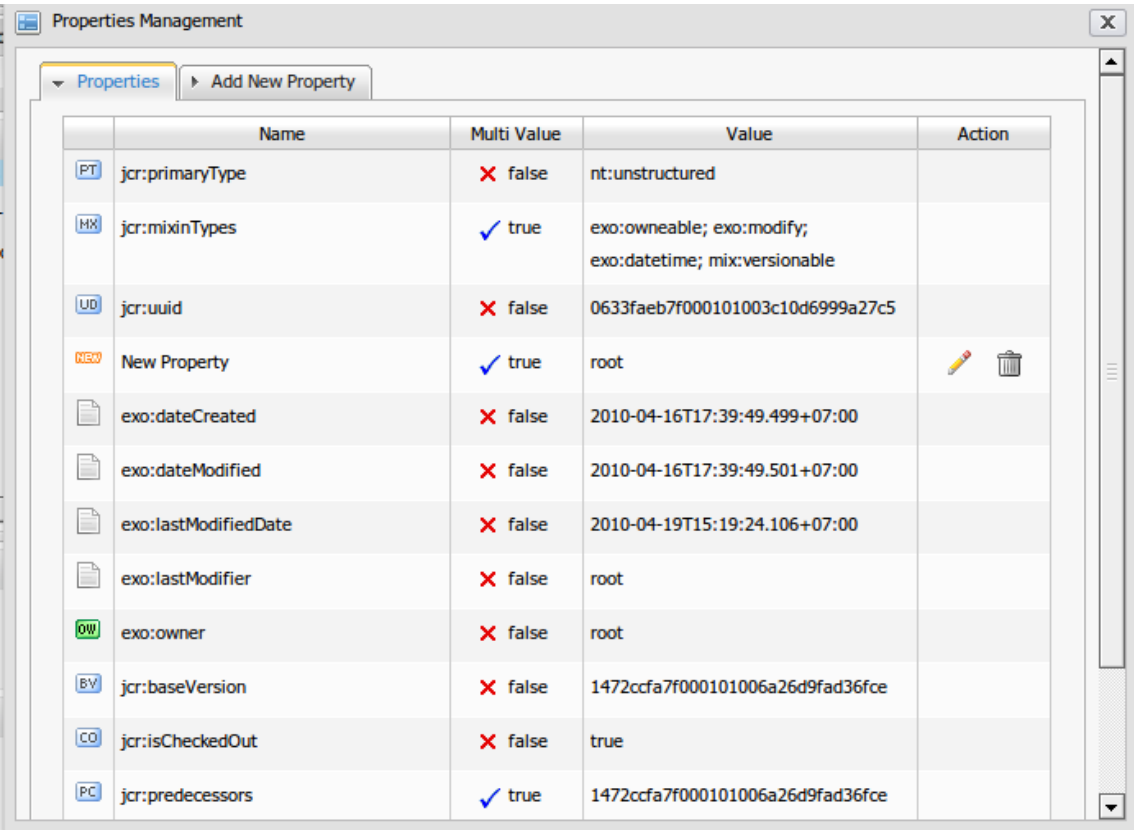
In this form you can edit a property by clicking

or delete it by clicking

4.6.4.30. View References

Procedure 4.57.

1. Select a categorized node.

2. Select the **Info** tab to show the **View References** action.
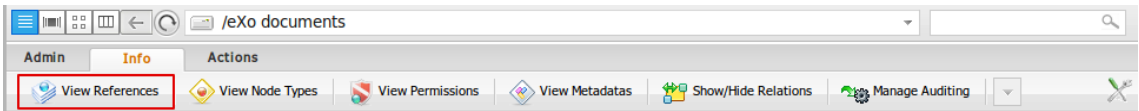
3. Select a category.

4. Click

on the action bar to show the **References List Form**

This form lists the path to each document that is also tagged in the selected category.
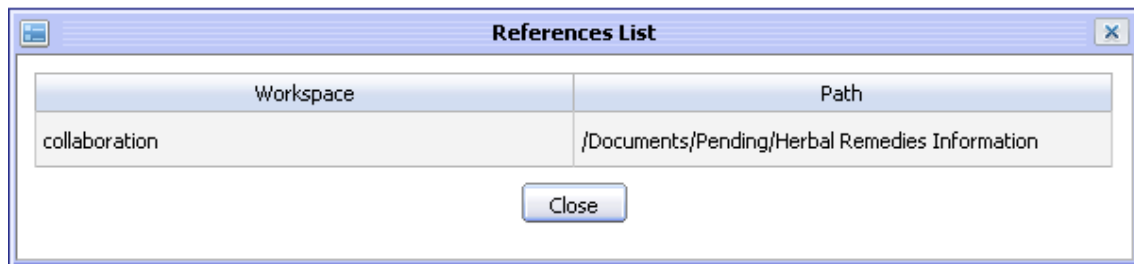
4.6.4.31. View Relations

This function shows documents related to a selected node.

1. **To View Relations**

   Select a node.

2. Click the **Info** tab on the Action bar.

3. Click

   . Documents related to the selected node will be shown in the sidebar.
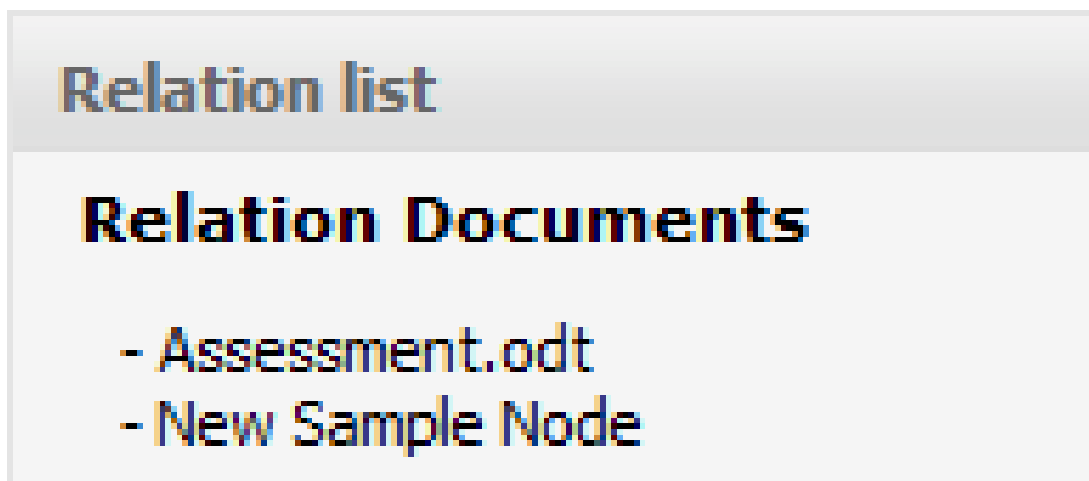
If the node does not have any related documents the message **No related document** will appear instead.
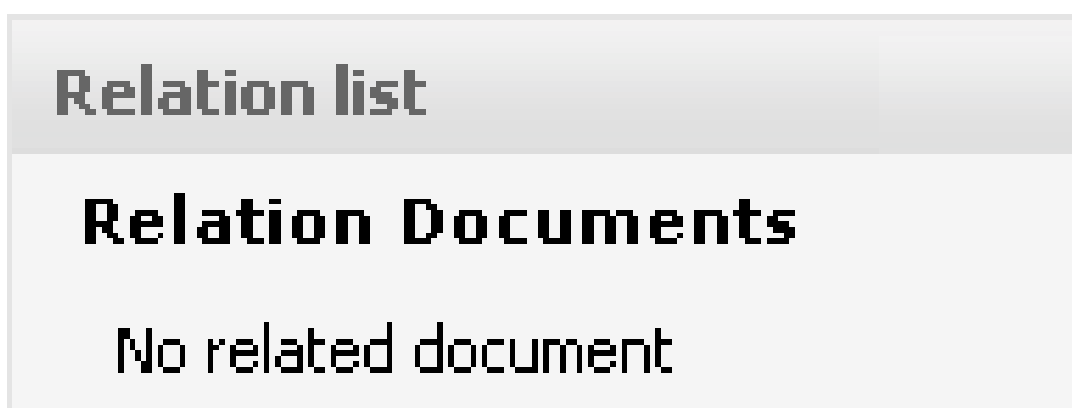
4. **To Hide Relations**

   Click
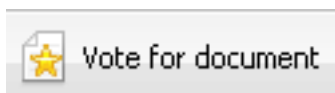
   again to hide relations.

4.6.4.32. Vote

This function is used to vote for a document (Note: you cannot vote for a **File Plan** document).

Procedure 4.58.

1. Open the document you want to vote for.

2. Select the **Collaboration** tag to show advanced actions.

3. Click

   .
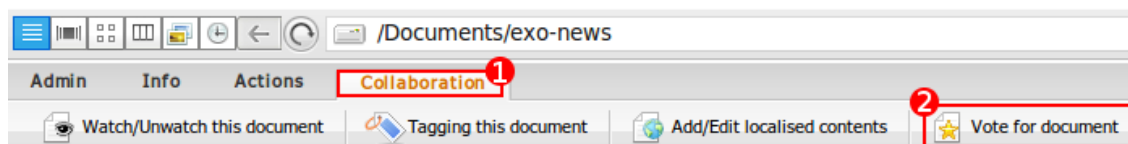
   The **Vote Document** form will appear:
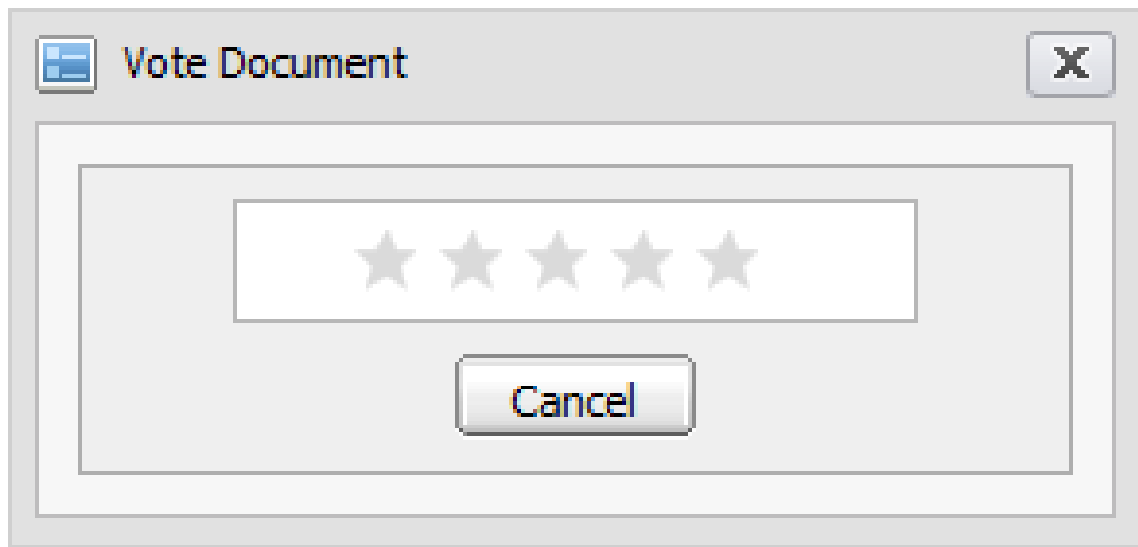
4. Rate the document by clicking on the appropriate star level for your vote:
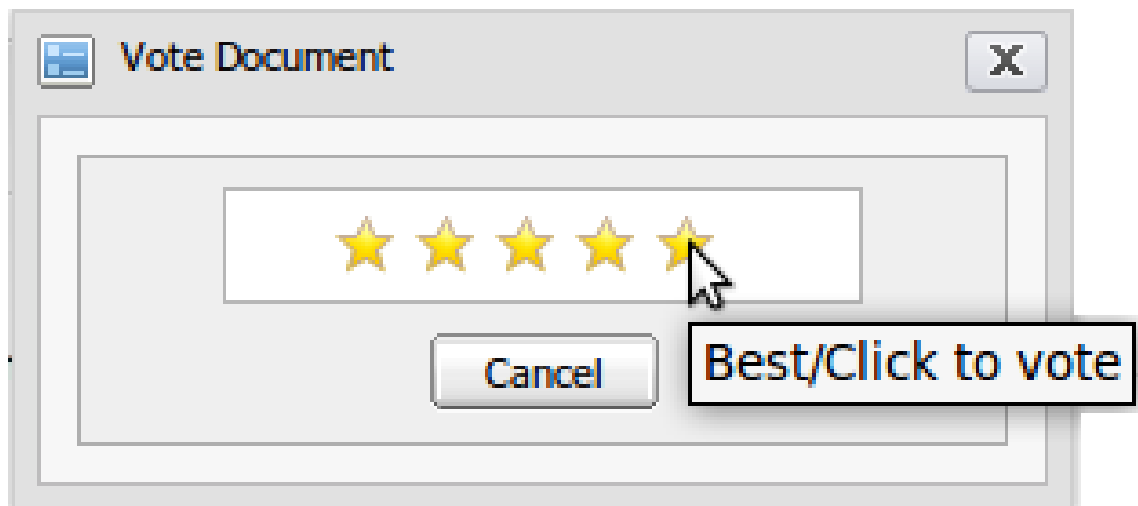
After a vote has been added, the rating will appear at the bottom of the document:
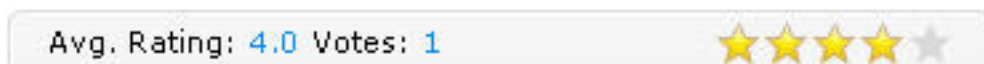
4.6.4.33. Watch Documents

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

Procedure 4.59.

1. Select the document you want to watch.

2. Chose the **Collaboration** tab then click

from the action bar.
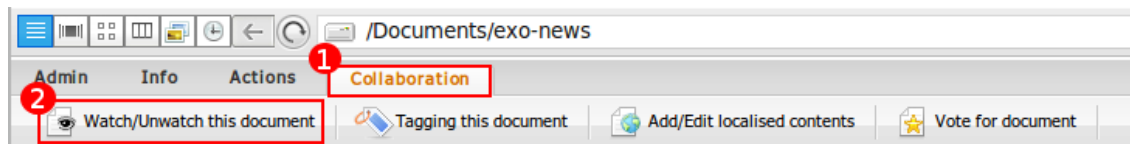
3. The **Watching Document** form will appear. Click the **Watch** button to finish.
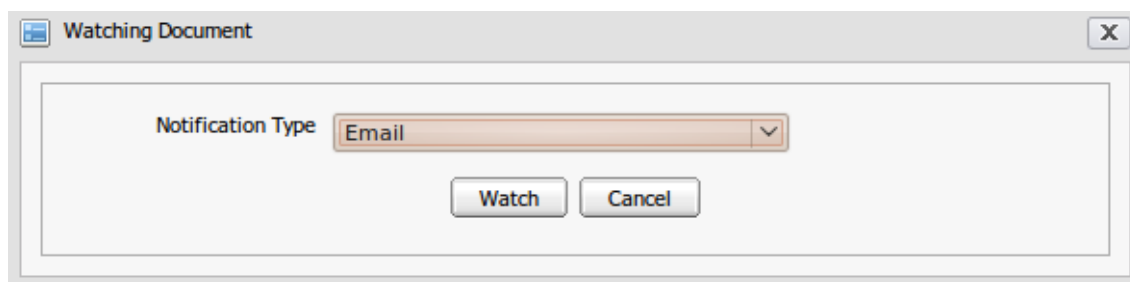
To stop watching a document, select the document and click

.

A message will appeared confirming the action.

4.6.5. Manage Content In Sites Explorer

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

4.6.5.1. Create a new web content

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

Do the following steps:

Procedure 4.60. Add new content
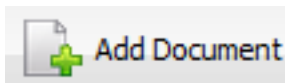
1. Go to the drive of the site that you want to add a web content.

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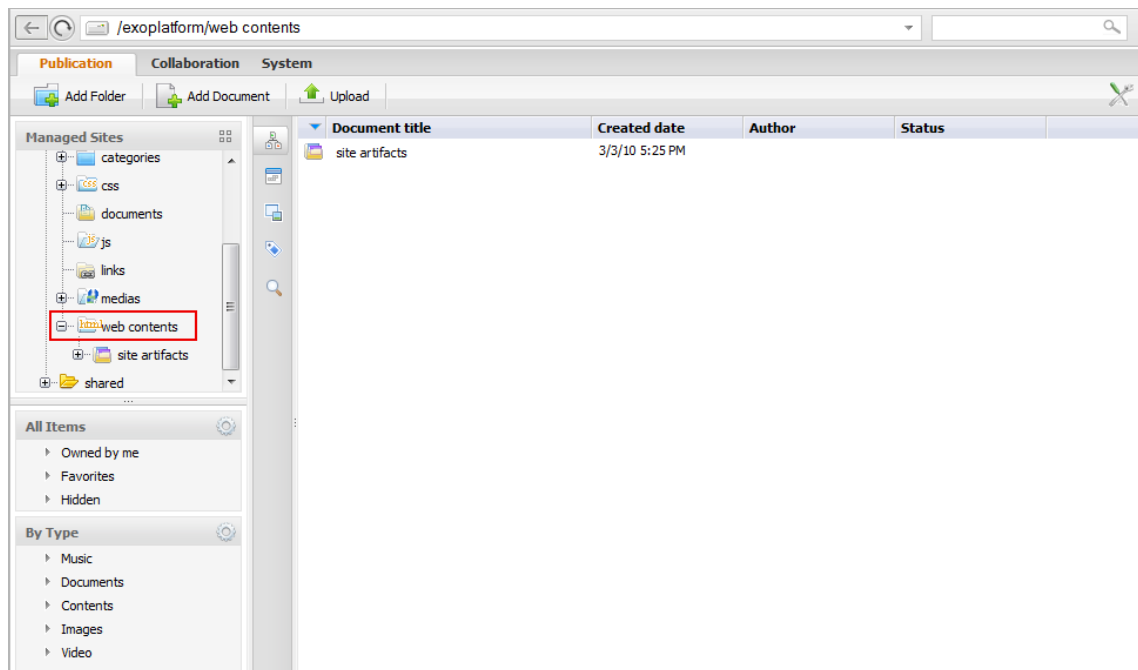
In this step, you also can add a new web content into another folders (documents and media folder) of a site but you are recommended to select the web content folder because:

- Manage web content of a site more easily.

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

3. Open the Add New Document form by clicking

on the Action bar.

4. Select a template in the Select Template field to present web content:
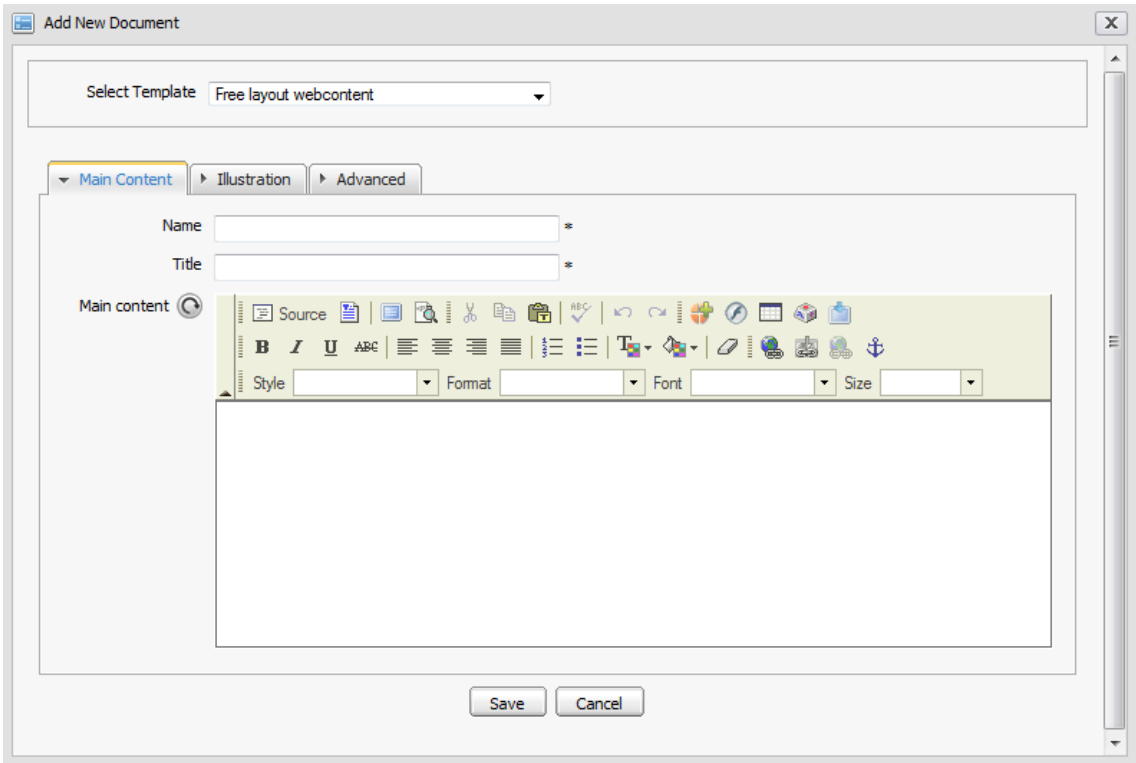
The Select Template field has two options:
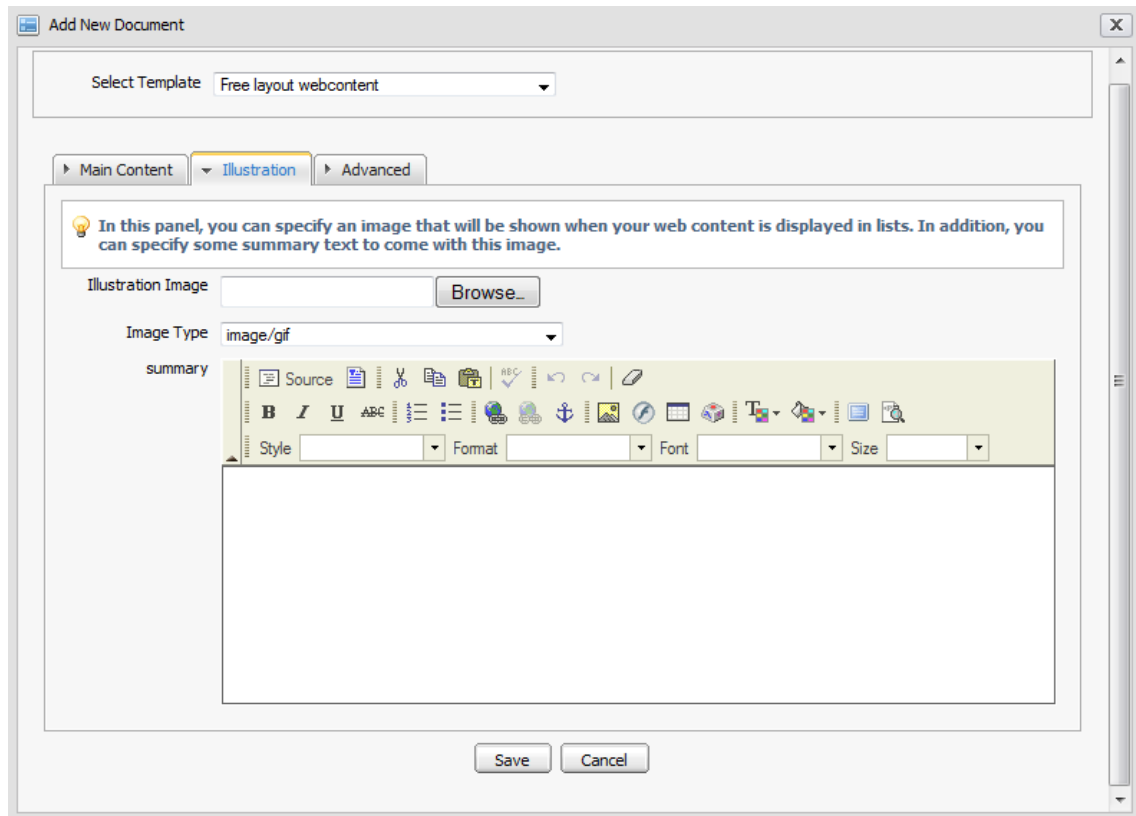
- **Picture on head layout web content:**The site's content is presented in two spaces. One for inserting an image and one for editing the site's content. In which, the image is put at the head of a site.

- **Free layout web content:**This template is a free layout.

The **Main Content**Tab includes:

Table 4.11.

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

The **Illustration Tab**allows you to upload an illustration that makes the site's content more attractive

Table 4.12.

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

To upload an image do as follows:

Procedure 4.61.

1. Browse an image list on your local computer by clicking the Browse... button and then select a specific location.

2. Select an image in a list.

3. Click   the

    icon to upload the selected image.

The **Advanced**tab includes two parts: CSS data and JS data:
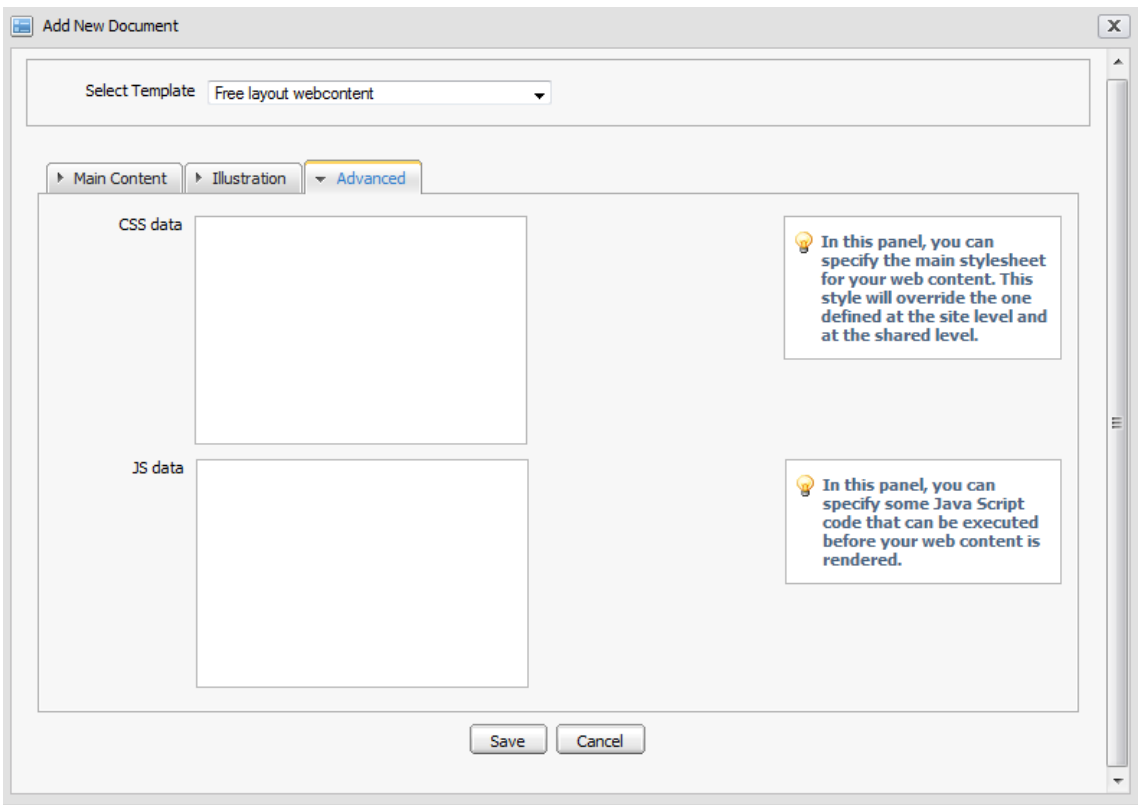
Table 4.13.

Field	Information
CSS data	Contains CSS definition to present data in a web content. You can optionally enter CSS data into this field to specify the style.
JS data	Contains JS content to make the web content more dynamic when after publishing. You can optionally enter JS content in this field.

5. Enter values in fields of the Add New Document form.

6. Click Save to accept adding new web content into a site.

4.6.5.2. Edit a web content

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

Do the following steps:

Procedure 4.62.

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

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

3. Click   on
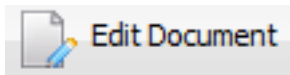
   the Action bar to show the edit form of the selected web content as

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

5. Complete editing the selected web content by clicking Save.

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

4.6.5.3. Delete a web content

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

To delete a web-content, do the following:

Procedure 4.63.

1. Right-click the name of the web content that you want to delete and then select Delete in the menu:
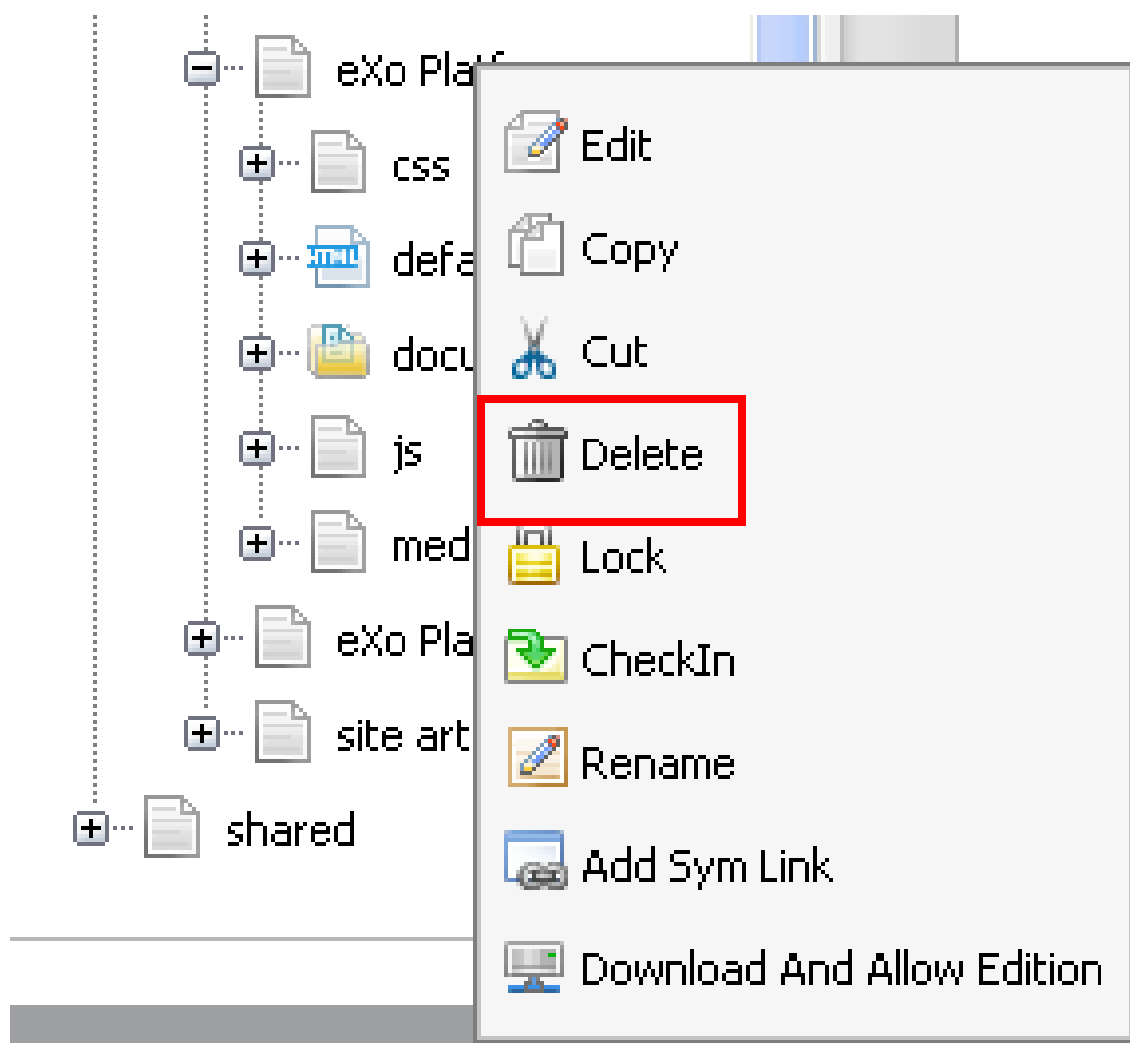
2. There will be a confirmation message. Click OK to accept the deletion, or Cancel to quit without deleting.

4.6.5.4. Publish a web content

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

To publish web-content, do the following:
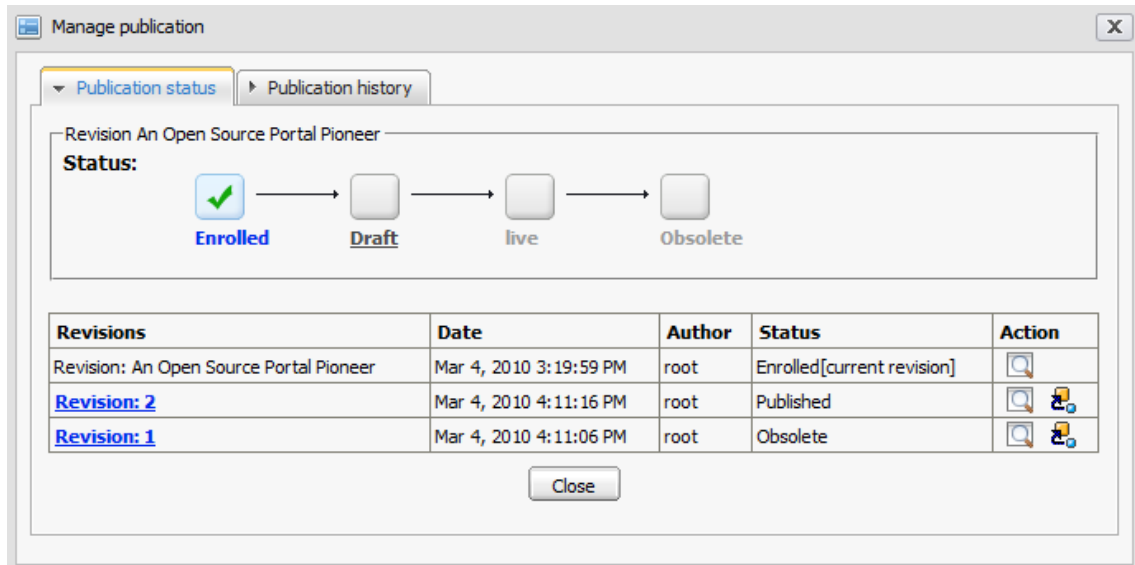
Procedure 4.64.

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

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

3. Show the Manage publication form by clicking

on the Action bar:

The Publication status tab:

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

- **Enrolled**: The revision is created but never be edited .

- **Draft**: The revision's already been created and it is editable. Thus you can still edit it if you want.

- **Live**: The revision can not be modified anymore. In this status, the content is ready for publication.

- **Obsolete**: The revision is not live anymore and you should unpublish it if is was published.
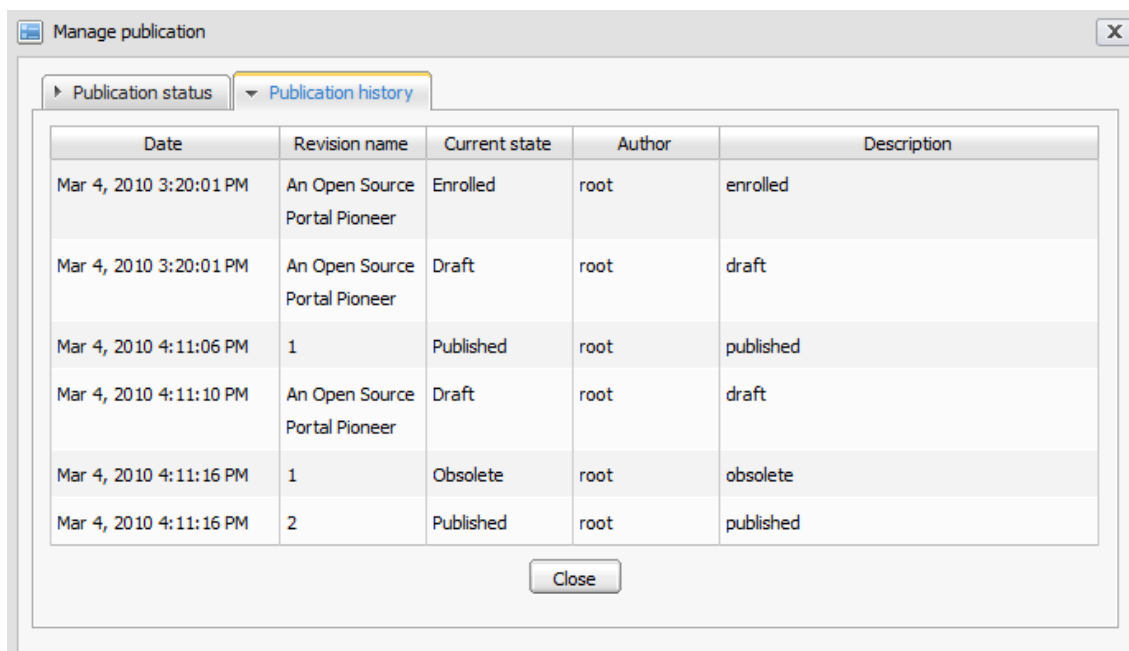
> **Content Status**
>
> You only can switch from one status to its next status. For example, your revision is in the *Enrolled* status and you only switch to the *Draft* status by clicking the *Draft* icon. After being switched, your revision will be in the *Draft* status.

The Publication history tab:

This tab is used to keep track of publishing history of a site.

Select the **Publication history**tab in the above form to view detailed information (including: Date, New State, User and Description) of a site's publication:

If you want to change the position for publishing the selected web content, select the current path and click right to left arrow to remove the path the select another location.

4. Click Close to close this form and publish successfully.

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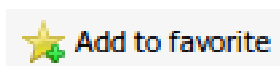
4.6.6. Actions on Folders and Documents

4.6.6.1. Add to favorites

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

Procedure 4.65.

1. Right-click the document you want to add as a favorite

2. Click

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

4.6.6.2. Copy/Paste Documents

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

Procedure 4.66. Method One

1. Right-click a document then select **Cut** or **Copy** from the menu.

2. Select a destination node.

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

4. The cut/copied folder (and its sub-folders) will be pasted to the new selected path.

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

Procedure 4.67. Method Two

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

2. Select the destination node.

3. Select the Clipboard icon:

4.   Click the Clipboard window will appear:

5. Click the

   in the clipboard window to paste the copied node into the selected destination node in step 3.

6. You can click the

   to delete a specific waiting statement.

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

After the action has been taken, a confirmation message will appear with detailed information about the destination path.

> ### Cut/Copy/Paste Information
>
> - You only can take the Cut/Copy action if you have a right on the source node.
>
> - You only can take the Paste action if you have a right on the destination node.
>
> - If the destination node has the same name with the cut/copied node, after being pasted, the pasted node will be added an index with its name. For example, in

this case, if "new folder" contains a node with name "Live", then after the paste action, in "new folder" there are two nodes with name Live and Live[2].

- You can not Cut/Copy a content folder into a document folder.

- After taking the Cut/Copy action, you can take the Paste action on different nodes before taking another Copy or Cut action.

4.6.6.3. Edit folders/ documents

4.6.6.4. Cut/Paste Documents

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

Procedure 4.68. Method One

1. Right-click a document then select **Cut** or **Copy** from the menu.

2. Select a destination node.

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

4. The cut/copied folder (and its sub-folders) will be pasted to the new selected path.

Cut/Copy/Paste Information
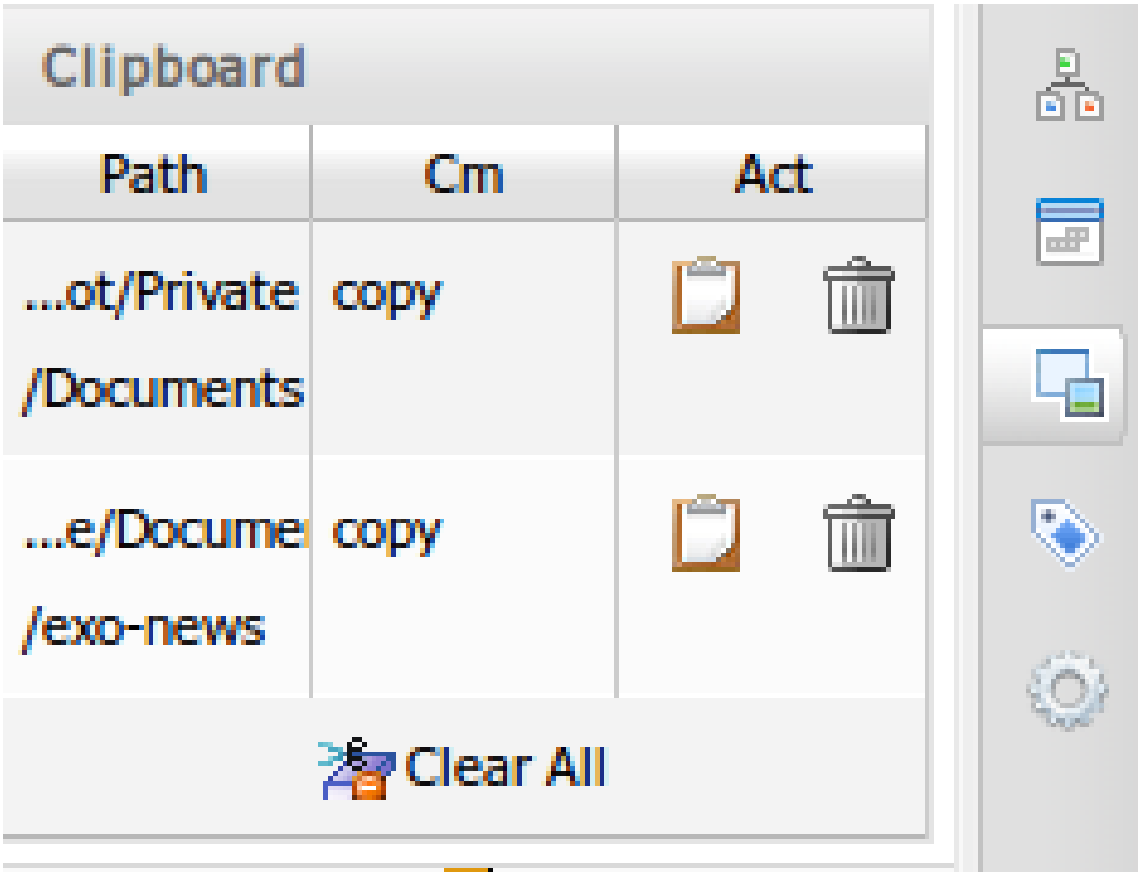
- You only can take the Cut/Copy action if you have a right on the source node.

- You only can take the Paste action if you have a right on the destination node.

- If the destination node has the same name with the cut/copied node, after being pasted, the pasted node will be added an index with its name. For example, in this case, if "new folder" contains a node with name "Live", then after the paste action, in "new folder" there are two nodes with name Live and Live[2].

- You can not Cut/Copy a content folder into a document folder.

- After taking the Cut/Copy action, you can take the Paste action on different nodes before taking another Copy or Cut action.

Procedure 4.69. Method Two

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

2. Select the destination node.

3. Select the Clipboard icon:

4. Click the Clipboard window will appear:

5. Click the

   in the clipboard window to paste the copied node into the selected destination node in step 3.

6. You can click the

   to delete a specific waiting statement.

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

After the action has been taken, a confirmation message will appear with detailed information about the destination path.

> **Cut/Copy/Paste Information**
>
> - You only can take the Cut/Copy action if you have a right on the source node.
>
> - You only can take the Paste action if you have a right on the destination node.
>
> - If the destination node has the same name with the cut/copied node, after being pasted, the pasted node will be added an index with its name. For example, in

> this case, if "new folder" contains a node with name "Live", then after the paste action, in "new folder" there are two nodes with name Live and Live[2].
>
> • You can not Cut/Copy a content folder into a document folder.
>
> • After taking the Cut/Copy action, you can take the Paste action on different nodes before taking another Copy or Cut action.

4.6.6.5. Delete folders and documents

Thsi function helps you remove folders easily.

Procedure 4.70.

1. Right-click a folder that you want to delete.

2. Select **Delete** from the menu.

    A confirmation message will appear:
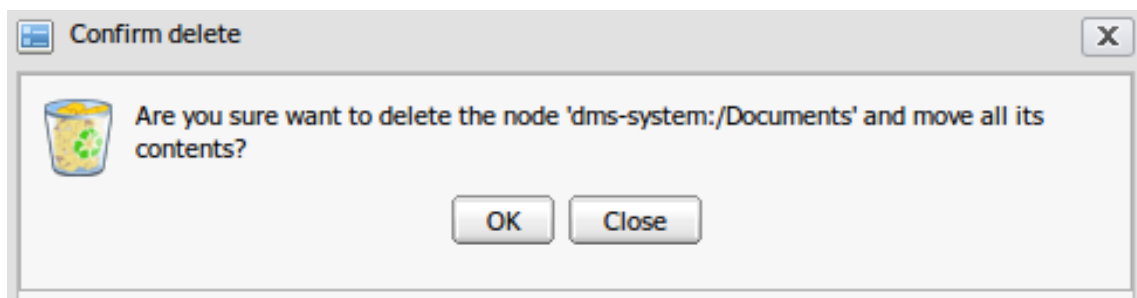
3. Click **OK** in the confirmation message to delete the folder or **Cancel** to quit.
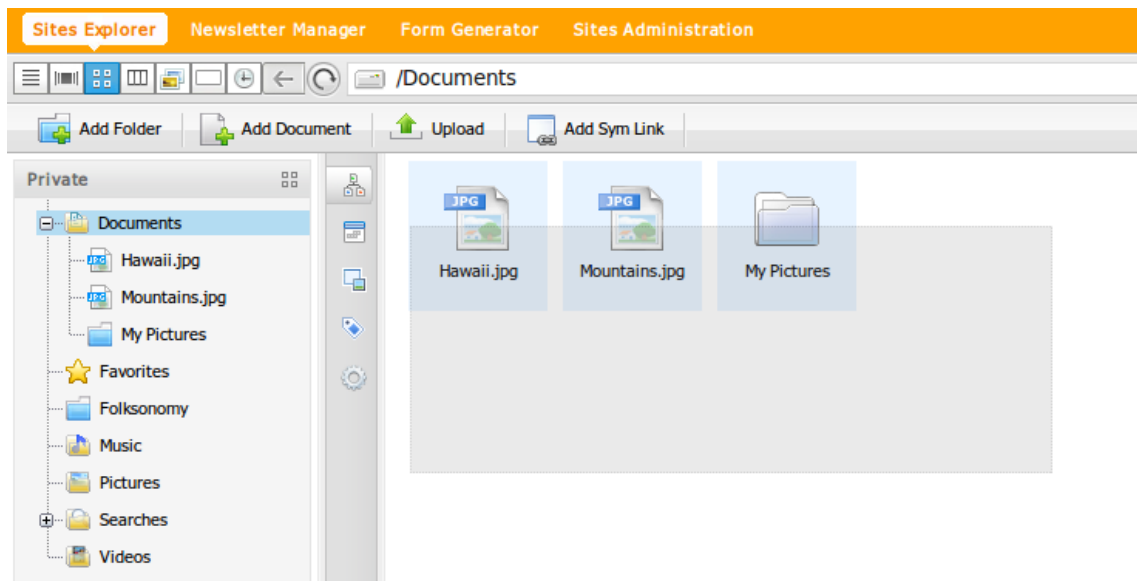
> **i** **Delete Rights**
>
> • You can only take the **Delete** action if you have the right on a node.
>
> • If the deleted node also contains sub-nodes, these will be deleted also.

4.6.6.6. Drag and drop folders and documents
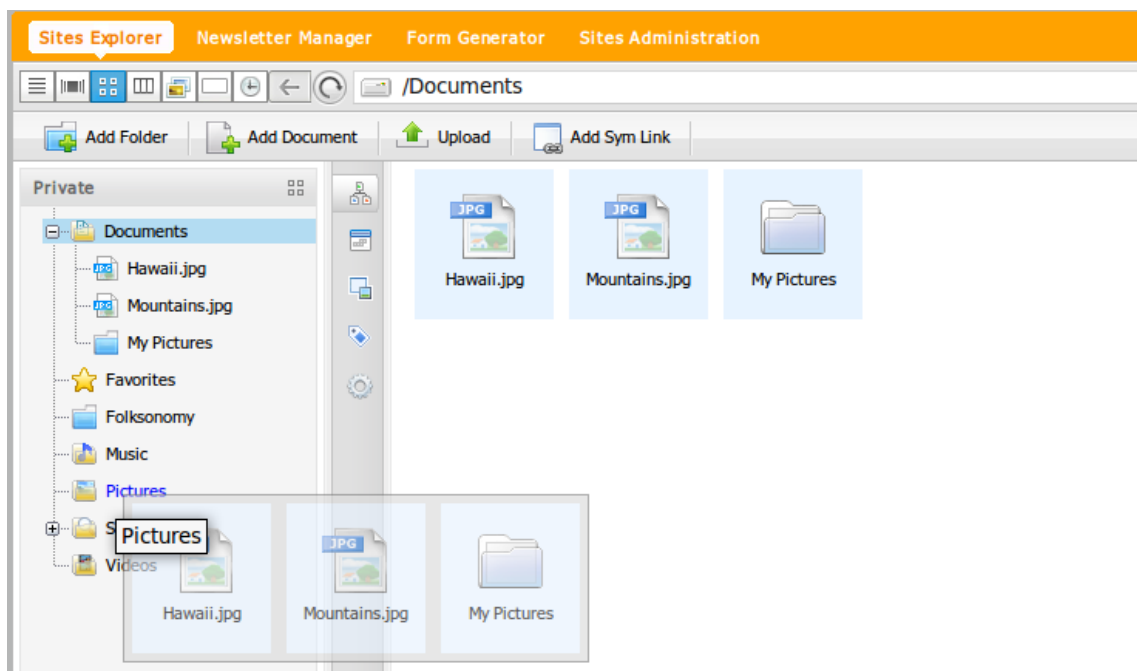
This function allows you to move folders from a current location to another one by using the drag and drop feature.

Procedure 4.71.

1. Move a cursor on a folder or folders on the right panel (hold the **Ctrl** or **Shift** key to select multiple folders at once) until the cursor changes to

.

2. Press the left mouse button and then drag the selected folder(s) to another folder on either the right or left panes.

3. Drop them into the selcted folder (by releaseing the left mouse button). All 'dragged' folders will be relocated to the destination folder.

4.6.6.7. Lock/Unlock folders and Documents

This function allows you to avoid changes to specific folders, actioned by others, during a specific time.

Lock folders. Just right-click a folder (on either the right or left window panes) and select **Lock** from the menu. The selected folder will be locked.

Locking Rights

- Only users with appropriate rights can lock folders.

- After locking, other users can only view the folder.

- The lock will be kept current for a session only. if the locking user signs out, the node will be unlocked

- Other users can create a copy of the locked node (by using the **Copy/Paste** functions outlined above), however the original node cannot be removed or altered.

- If no action is taken on a locked node within 30 minutes, the lock will be automatically removed.
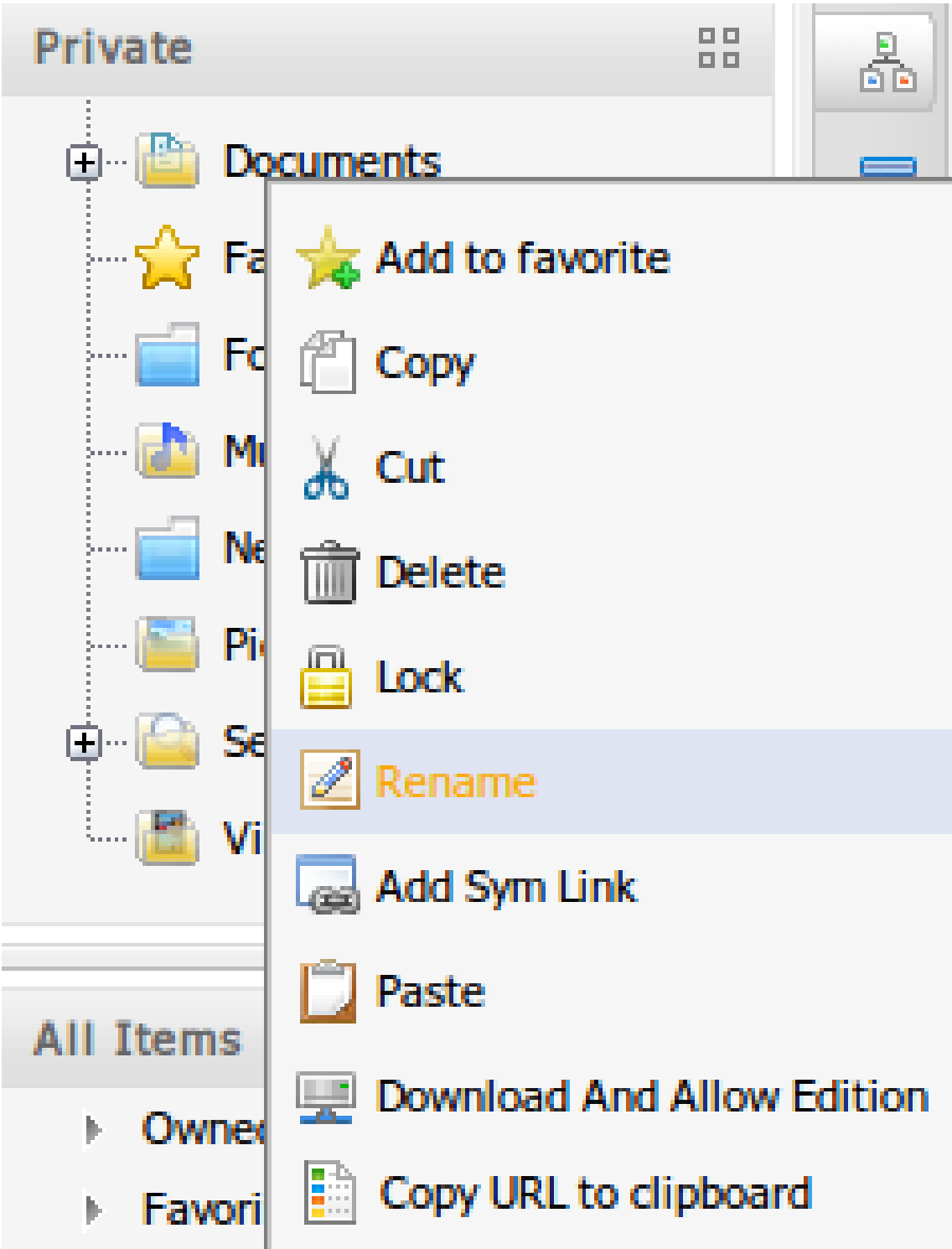
Unlock folders. To unlock a folder, right-click a locked folder and select the **Unlock** item on the menu. The folder will then be unlocked and other users can take actions on it.

4.6.6.8. Rename folders and Documents

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

Procedure 4.72.

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

The rename form will appear:
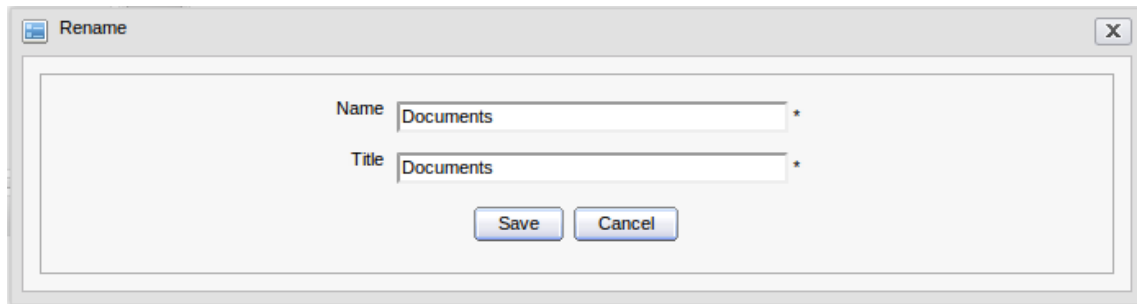
2. Input a new name in the **Name** field. You can also change the title of this folder by entering a new one in the **Title** field.

3. Click save to commit the new details.

4.6.6.9. Add a symlink

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

To add a symlink do as follows:

Procedure 4.73.

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

2. Select the Actions tab to show some actions on the Action bar
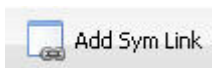
3. Click   the

on the Action bar. The Sym Link Manager pop-up will appear:
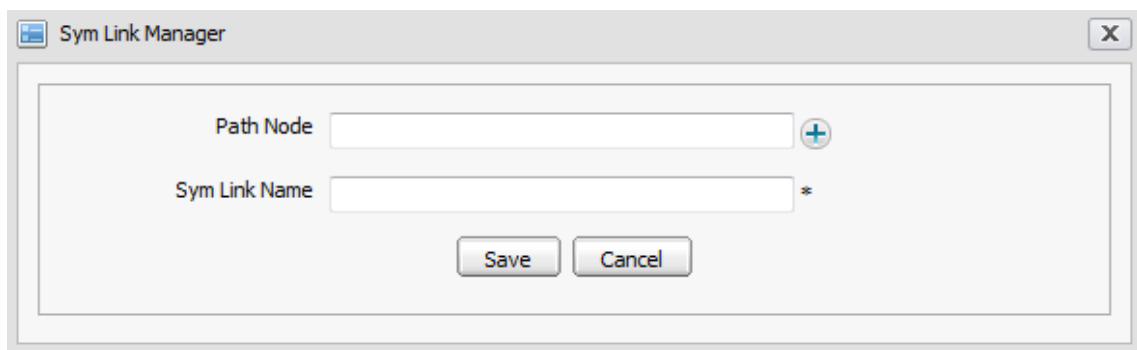
Table 4.14.

Field	Details
Path Node	The path of a link

Field	Details
Symlink name	The name of the link.

4. Click   the

    icon to open the **Choose Target Node** form.

5. Choose the workspace which contains the node that you want to add a symlink:

6. Click   the

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

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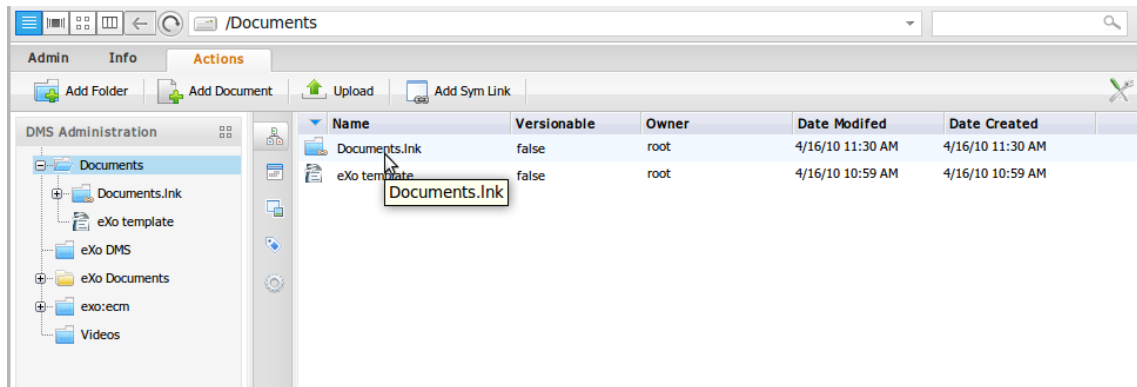
You can select mupltiple nodes at once by holding the **Ctrl** or **Shift** key and select nodes or move mouse over nodes. By using this feature, you can take some actions (copy, cut, delete, lock/unlock) on different nodes at the same time.

4.6.6.10. View WebDAV

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

Procedure 4.74.

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

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

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

- **Folder**: The sub-nodes list of the current folder will be displayed in WebDAV.

- **nt:file**: The content of the document will be shown.

- **Article**: This node type does not, by default, list any folders. However, if the Article includes actions, added language or other data, all folders will be listed and named; *exo:actions*, *exo:language* and so on.

- **Podcast**: Veiwed in WebDAV, this node type will be attached a form that users have to complete to download this document.

- **Sample node**: This node lists folder names as *exo:images*. Like **Article**, if the **Sample** node contains actions or added languages, folders will be named *exo:actions*, *exo:language* and so on.

- **File Plan**: This node behaves the same way as **Article** and **Sample node**.

- **Kofax**: This node behaves the same way as **Article** and **Sample node**

4.6.6.11. View Document
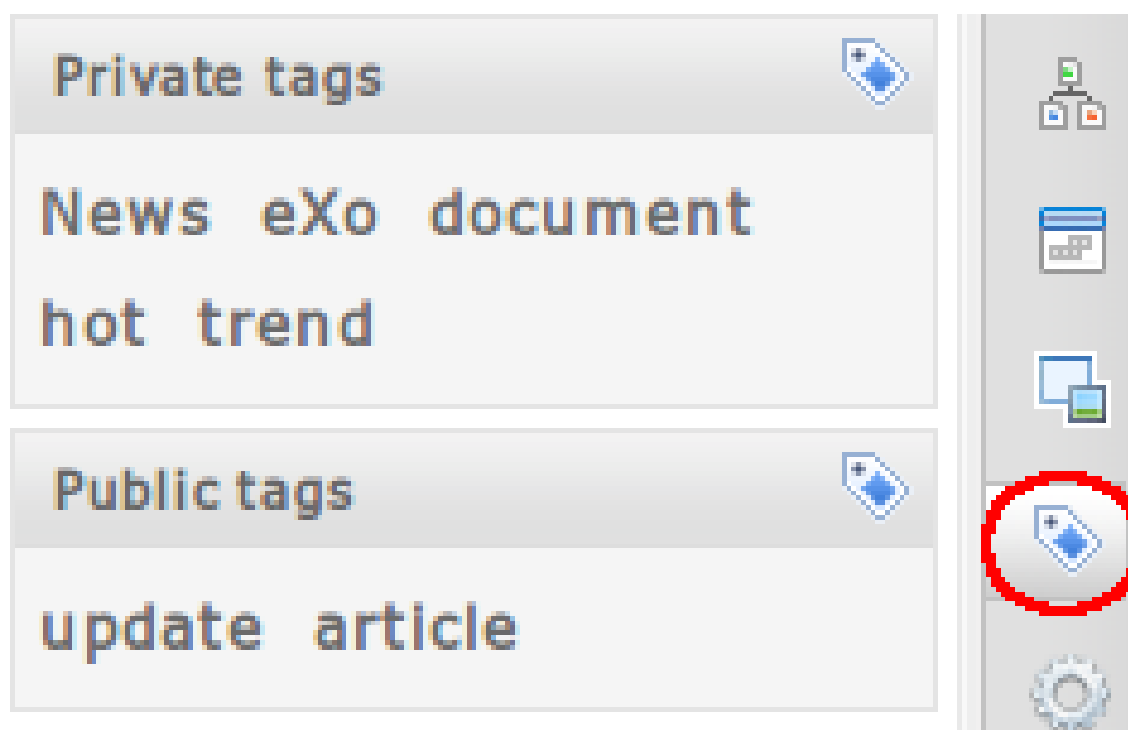
4.6.6.12. Copy URL to Clipboard

4.6.6.13. Use Created tags

Select   the   Tag   cloud

you will see all existing tags: All existing tags are listed and classified by private or public tags.

Tags will be displayed differently depending on popularity. The font size, weight, color, family and text-decoration will be used to visuall communicate popularity.

For example, tags added to over ten documents will be displayed in red, at 20px and bold. These settings can be configured in WCM Administration portlet.

Each tag is also link to all documents with the same tag. Click a tag name to see these documents listed in the right panel.

4.6.6.14. Manage Tags

Tags are easily managed by editing or deleting them with the **Tag Manager**.

Procedure 4.75. Edit a tag

1. Click the

   icon at the upper-right corner of the tags panel.
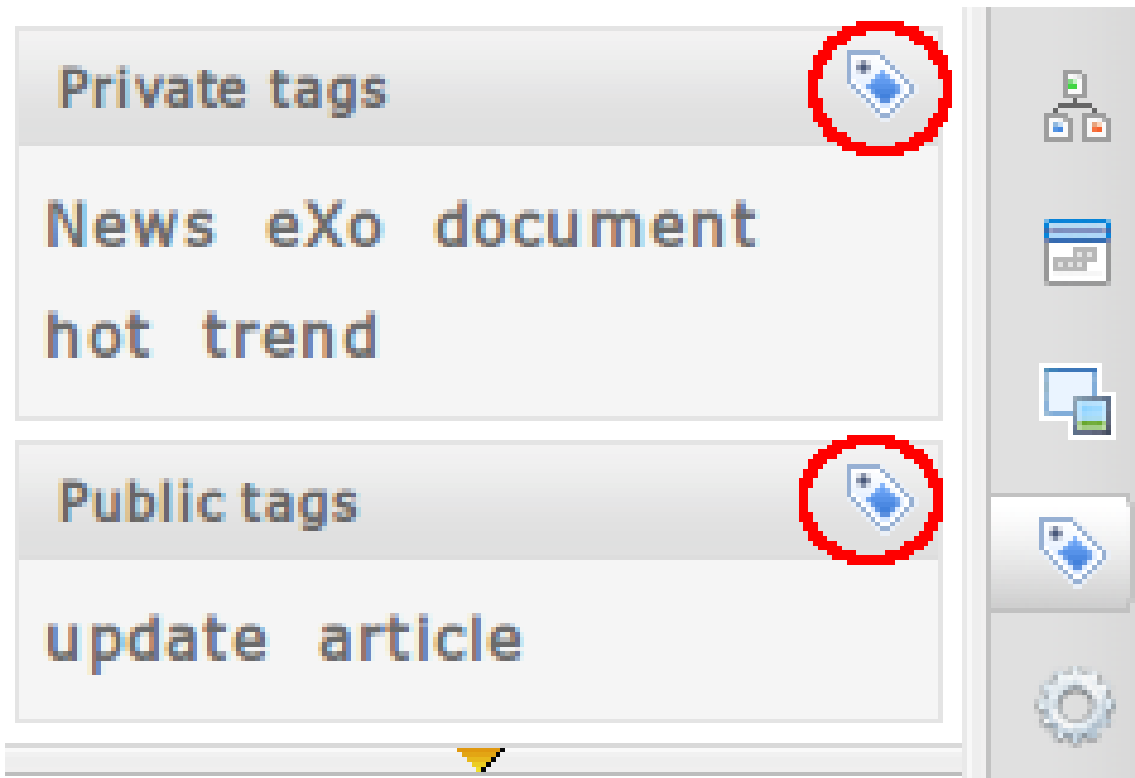
   The **Edit tag form** will appear:
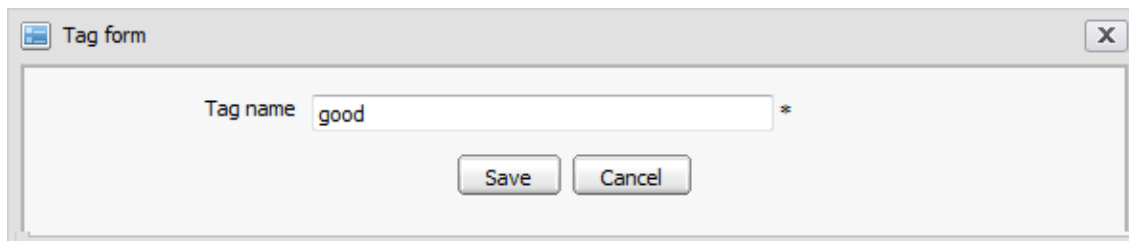
2. Click the

   that corresponds to the tag you want to edit.

3. Edit the tag as desired.

4. Click **Save** button to commit the change or **Cancel** to quit without changes.
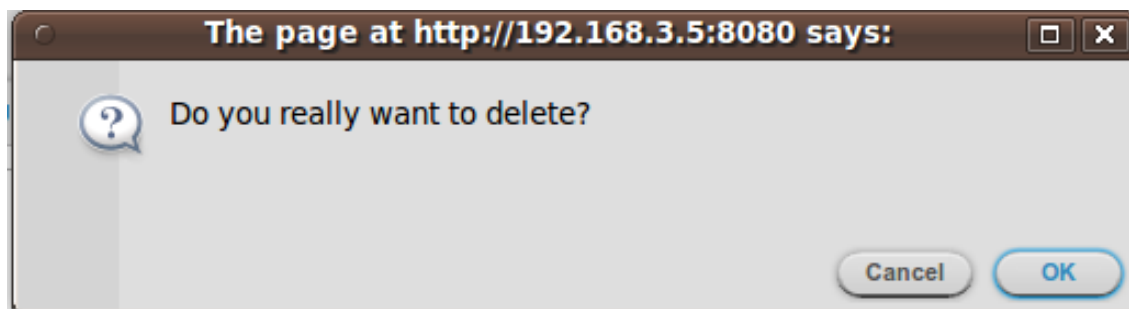
Procedure 4.76. Delete a tag

1. Perform **Step 1** from the procedure above.

2. Click   the

.

A confirmation box will appear:

Click **OK** button to delete the tag or **Cancel** to quit.

4.7. Manage Site Content with WebDAV

4.7.1. What is WebDAV

WebDAV is an abbreviation of **Web**-based **D**istributed **A**uthoring and **V**ersioning.. It is used to publish to publish and manage file and directories on a remote server. It also groups users to perform these these functions on a website.

WebDAV provides the following features:

Locking
> This feature prevents two or more collaborators from overwriting shared files.

Site Manipulation
> WebDAV supports copy and move actions and the creaion of *collections* (file system directories)

Name space management

    This function enables copying and moving web pages within a server's namespace.

4.7.2. Why use WebDAV?

You should use WebDAV to manage site content because of the following reasons:

- Copy/paste web content on a desktop machine and have those changes reflected in a host-based website.

- Easily, quickly and flexibly manipulate actions on a website without having to access it directly with web-browsers. FIles can be accessed from anywhere and are stored as in local directories.

- Easily and quickly upload content to a website simply by copying it into the appropriate directory.
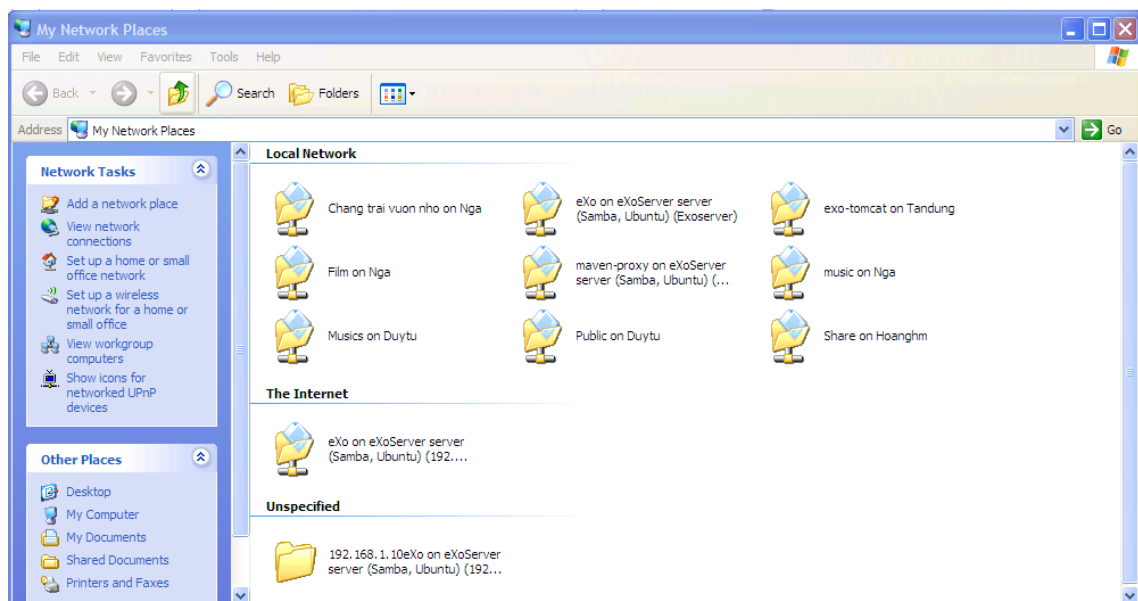
4.7.3. How to Use WebDAV With eXo Content

WCM supports WebDAV in two ways:

This way is used when you are on a Window System and your computer has to be connected to the Internet or Intranet.

Procedure 4.77. Method One:

1. Navigate to the **My Network Places** on your local computer. You will see all shared files and folders:
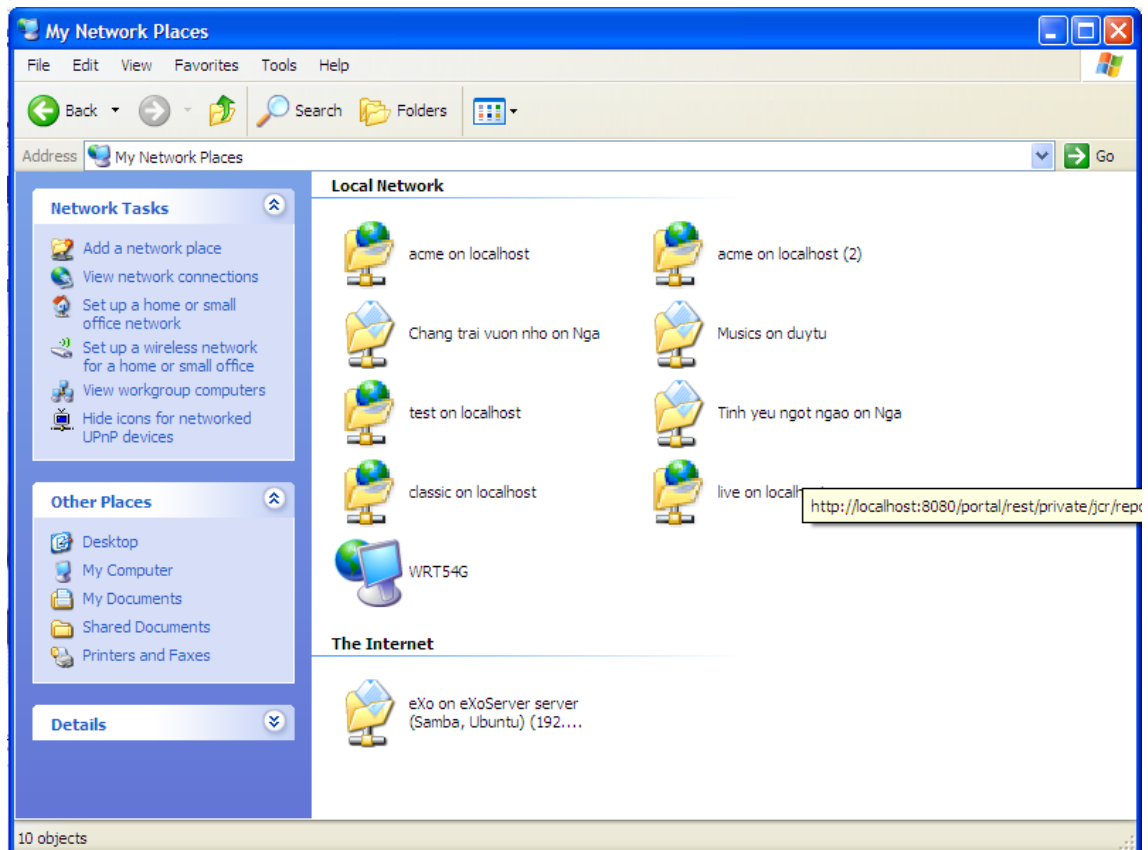
2. Click the **Add a network place** link on the left to open the **Add Network Place Wizard**:
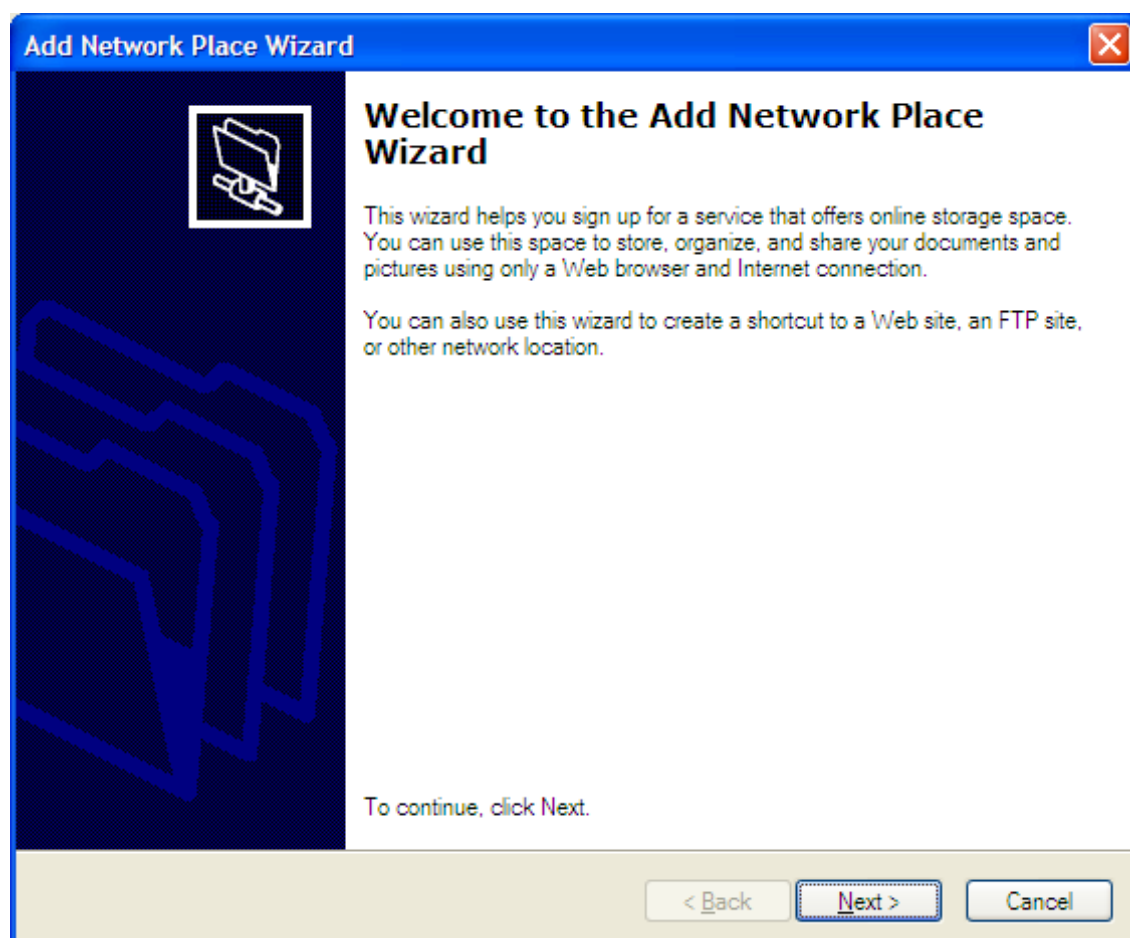
3.   Click **Next** to choose a network location:
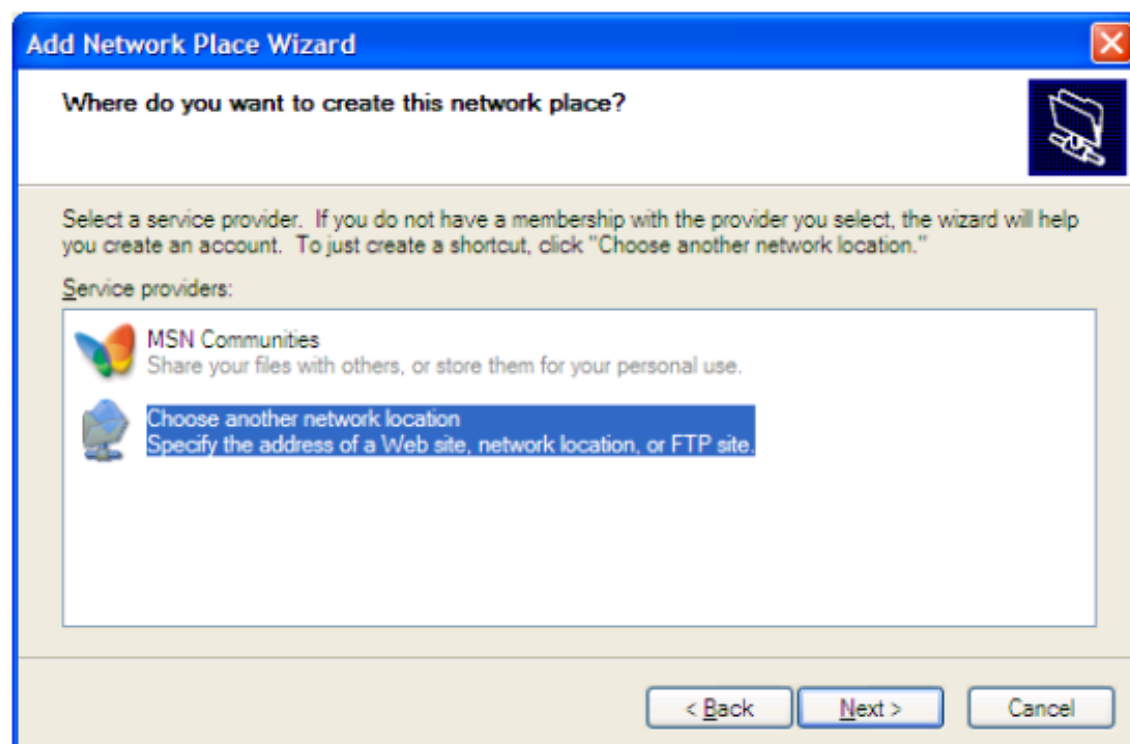
4. Select **Choose andother network location** to create a shortcut.

5. Enter an address into the **Internet or network address** field. As an example, the address of the demonstration site *Acme* is **http://localhost:8080/portal/rest/private/jcr/repository/collaboration/sites/content/live/acme**

6. Click **Next**. After a few moments a folder named **acme on localhost** will appear in the **My Network Places** directory.
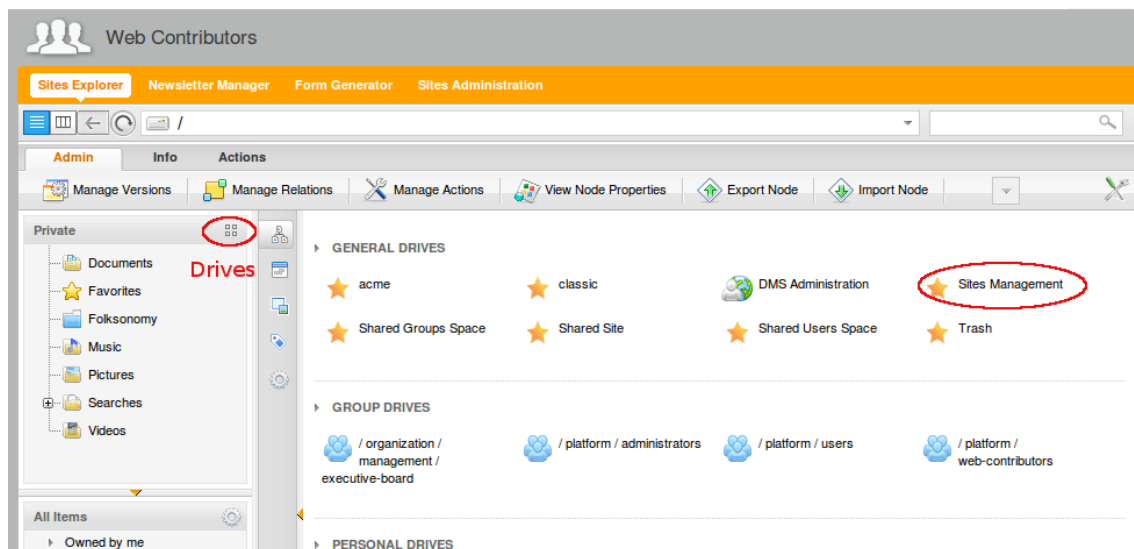
Each site being managed by WebDAV will appear as a folder in this location.
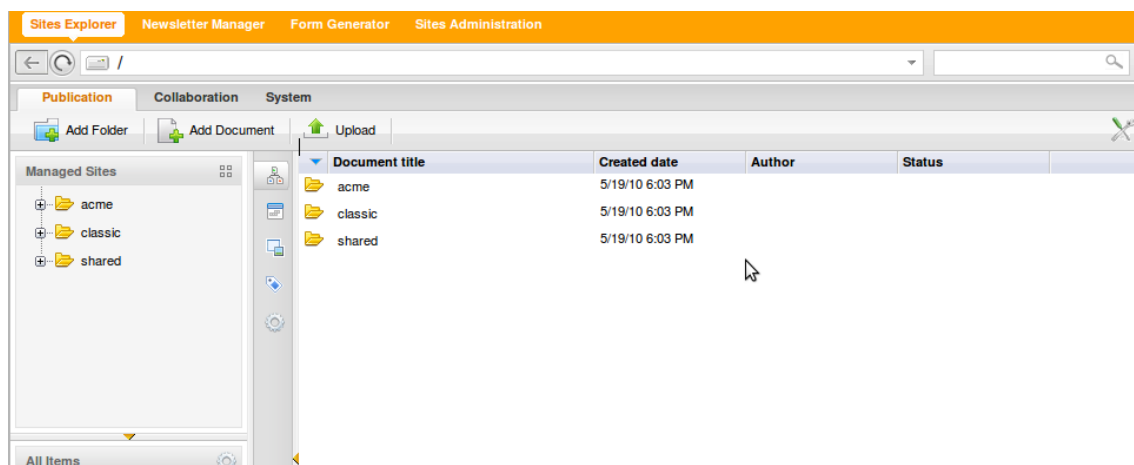
7. Take action on the content in this folder to administer the site content remotely.

Procedure 4.78. Method Two:
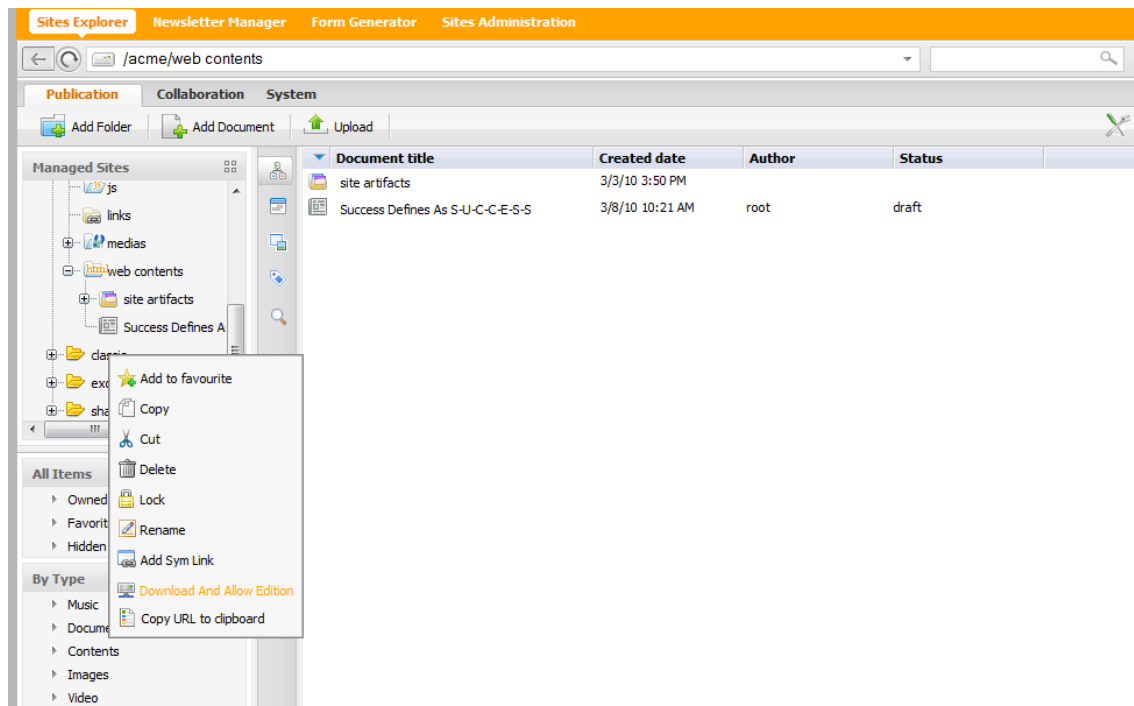
1. Navigate to *http://localhost:8080/portal* in your web browser.

2. Click **Group | Sites Explorer** in the Administration bar.

3. Click **Drives** the select **Sites Management**.
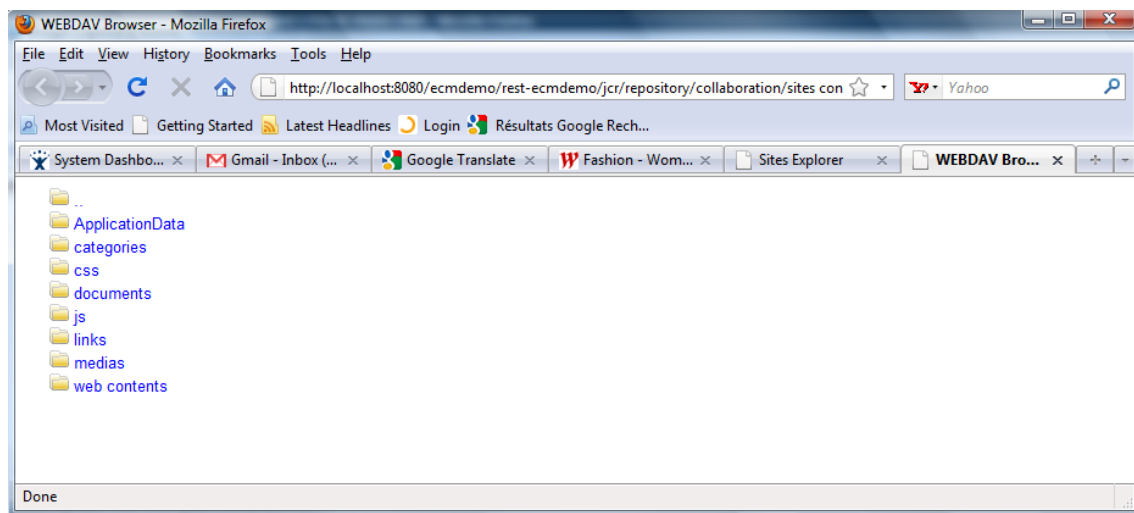
You will see all sites listed in the left sidebar:

4. Right click the site you want to view with WebDAV and select the **Download and Allow Edition** item in the menu.

The selected site will be shown in WebDAV:

In this view you can you can access documents in the directories that are linked to the web server.

4.7.4. Actions

You see all *default folders* of a site when accessing it via WebDAV. Manipulating content through WebDAV is the same as working on it in local folders.

This means you can copy/paste files, list folders, rename and more in system directories.

4.7.4.1. Add new content to a specific site

This function allows you to copy web content (such as an **.html** file) from your local computer to a *web content* folder of a site.

Procedure 4.79.

1. Access a site via WebDAV (refer to *Section 4.7.3, "How to Use WebDAV With eXo Content"*) then go to a **web content** folder of the site.

2. Copy the web content on your local system into this folder.

    The copied file will be converted to web content that is viewable by WebDAV automatically. The content is converted to a directory containing *CSS*, *documents*, *js* and *media*.

After new content is added it can be viewed as a folder in WebDAV or as page content using a web browser.

4.7.4.2. Delete a web content

This function allows site administrators to delete web content files singularly or in batches.

Procedure 4.80.

1. Navigate to the folder that contains the content you want to remove.

2. Right click the content files or directories (hold the *Ctrl* key to select multiple files at once) and select **Delete form the context menu**.
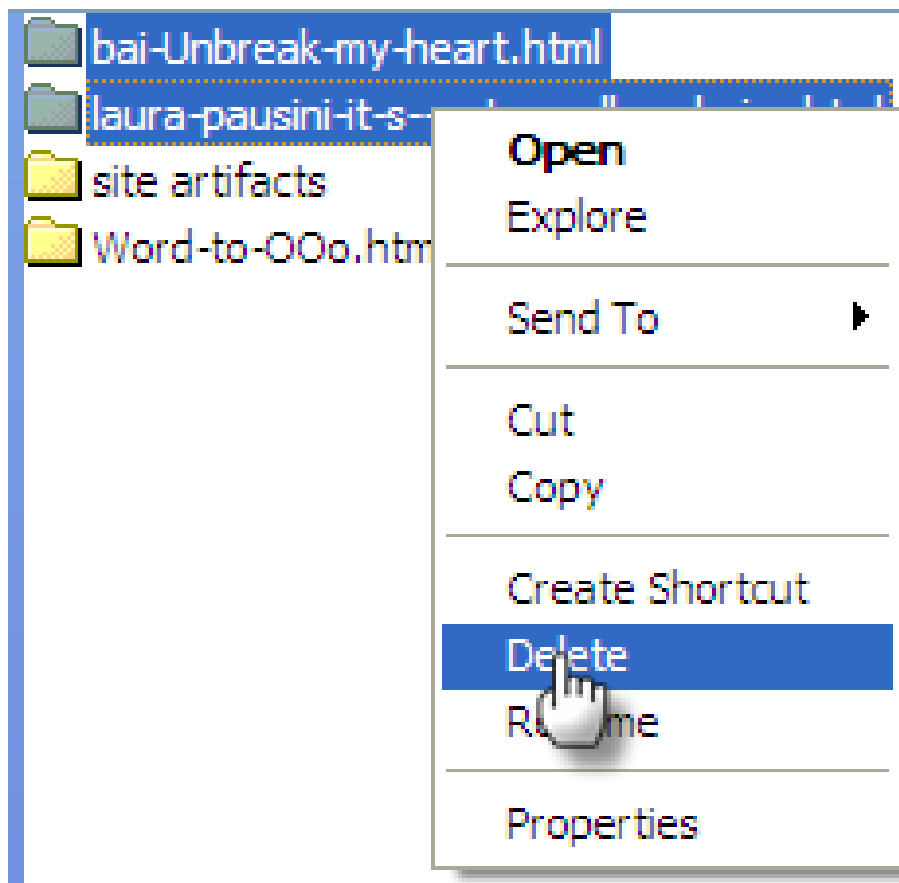
The selected file(s) will be removed from the site.

4.8. Search in Sites Explorer

There are three ways to search an existing node:

1. *Section 4.8.1, "Simple Search"*.

2. *Section 4.8.2, "Advanced Search"*.

3. *Section 4.8.3, "Quick Search"*

4.8.1. Simple Search

This function is used to search with properties of the document (Note: Not the document's name).

Procedure 4.81.

1. Enter a string that is found in the document you are searching for (Note: Do not use the document's name).

2. Click   the

icon to perform the search.

Search results will be displayed in the right pane.
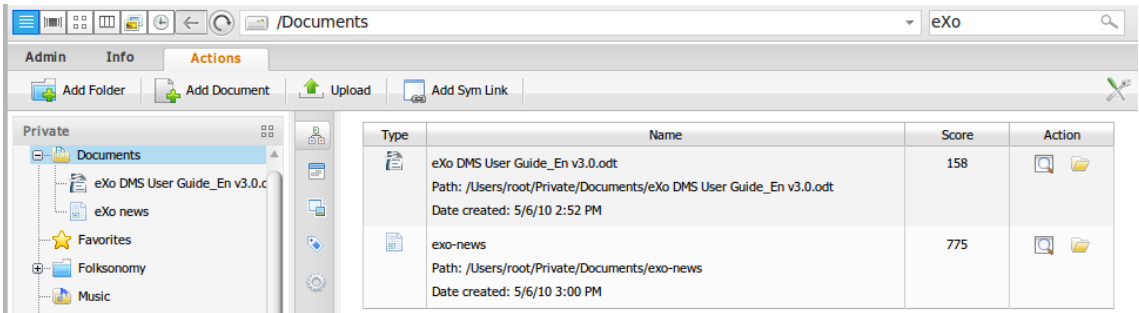
The search results will appear empty if no node cotains the search string.

3. Click   the

to view the content containing the search string.

Or   click   the

icon to go to the node that contains the search result.

4.8.2. Advanced Search
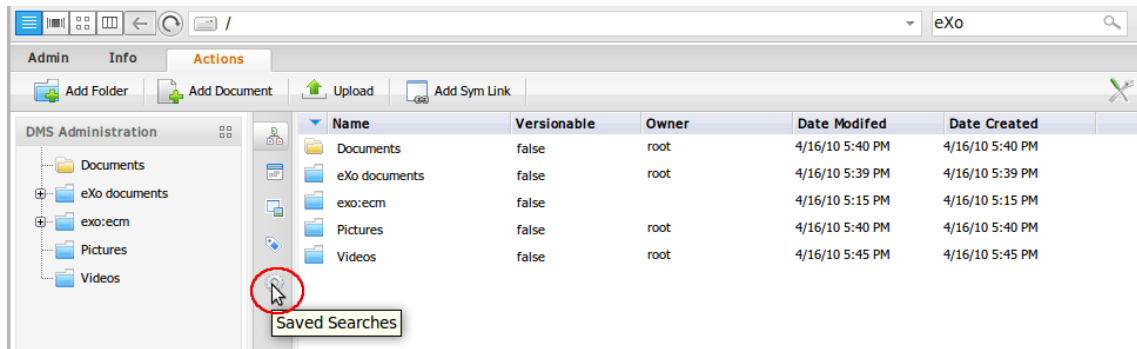
To perform an advanced search:

Procedure 4.82.

1. Click   the

Saved Search icon.

2. Then click the **Advanced Search** icon

to open the **Advanced Search** form.
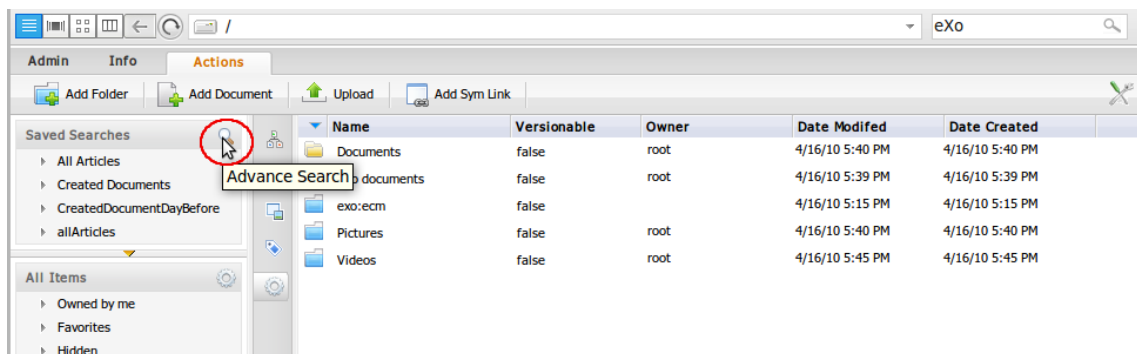
The **Advanced Search** form will open:
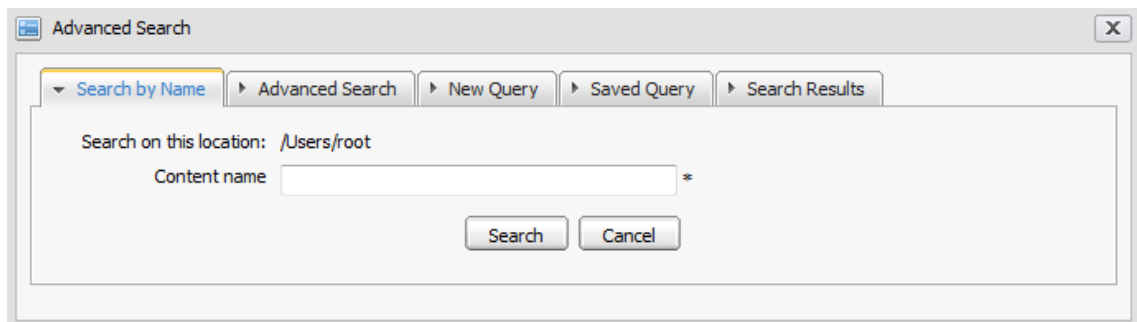
The tabs in this form offer different search functions:

- *Section 4.8.2.1, "Search by Name"*

- *Section 4.8.2.2, "Search with constraints"*

- *Section 4.8.2.3, "Search by creating a new query"*

- *Section 4.8.2.4, "Search by existing queries"*

4.8.2.1. Search by Name

Use the **Search by Name** tab to search nodes by name:

Procedure 4.83.

1. Enter the exact name you wish to search for in the **Content name** field.

2. Click **Search**.
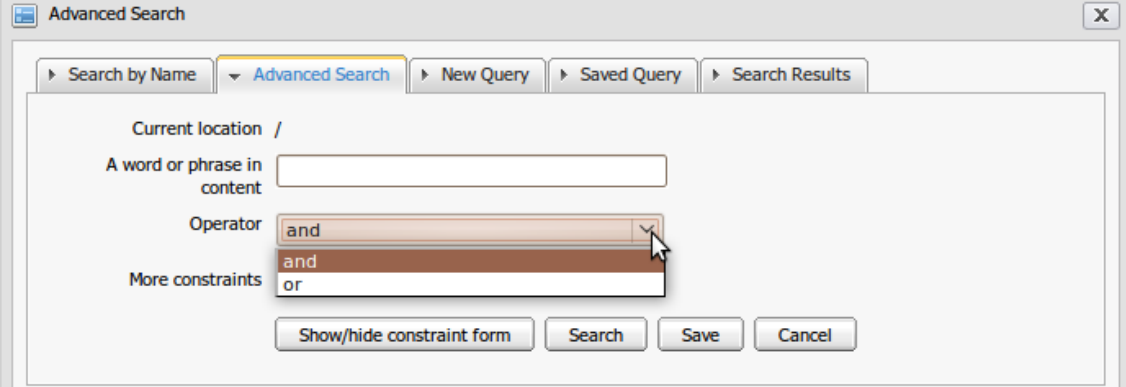
    Results will return with the message *"No result found"* if there is no node with the entered name.

    Results will be returned in the **Search Results** tab if the requested name is found.

4.8.2.2. Search with constraints

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

Extra search constraints are entered in the **Advanced Search** tab of the **Advanced Search** form.

The **Current location** field is not editable. It shows the path selected to search.

Procedure 4.84.

1. Enter search terms in the **A word of phrase in content** field.

2. Select the **Operator**.

    *   Select **AND** operator to only return results that meet *both* the search terms and the entered constraints (see Step 3).

    *   Select **OR** operator to return results that meet *either* the search terms or the entered constraints (see Step 3).

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

a further constraint options window will appear:

Table 4.15.

Item	Details
1	You can add more than one constraint thus there are two operators AND and OR for you to combine them.
2	These fields allow you to add a constraint to search by a property with specific values.
3	These fields allow you to add a constraint to search by a property with specific values.
4	These fields allow you to add a constraint to search by a property that contains one of the word in the specific string.

Item	Details
5	These fields allow you to add a constraint to search by a property that does not contain the specific string.
6	These fields allow you to add a constraint to search by a duration of date (created, modified).
7	This field allow you to add a constraint to search by the document type (File, Article, Podcast, Sample node, File Plan, Kofax).
8	This field allow you to add a constraint to search by categories.
	Add a document type.
	Add a category.

4. Select the constraint operator(**AND/OR**).

5. Add the required constraints using one of the follow methods:

    1. *Add a constraint for exact values*

    2. *Add a constraint including or excluding values*

    3. *Add a constraint by date*

    4. *Add a constraint by document type*

    5. *Add a constraint by category*

Procedure 4.85. Add a constraint for exact values

1. Check the box that corresponds to the constraint you want.

2. Enter the property you want to locate or click the **Add property** icon

    .

A list of possible properties appears:
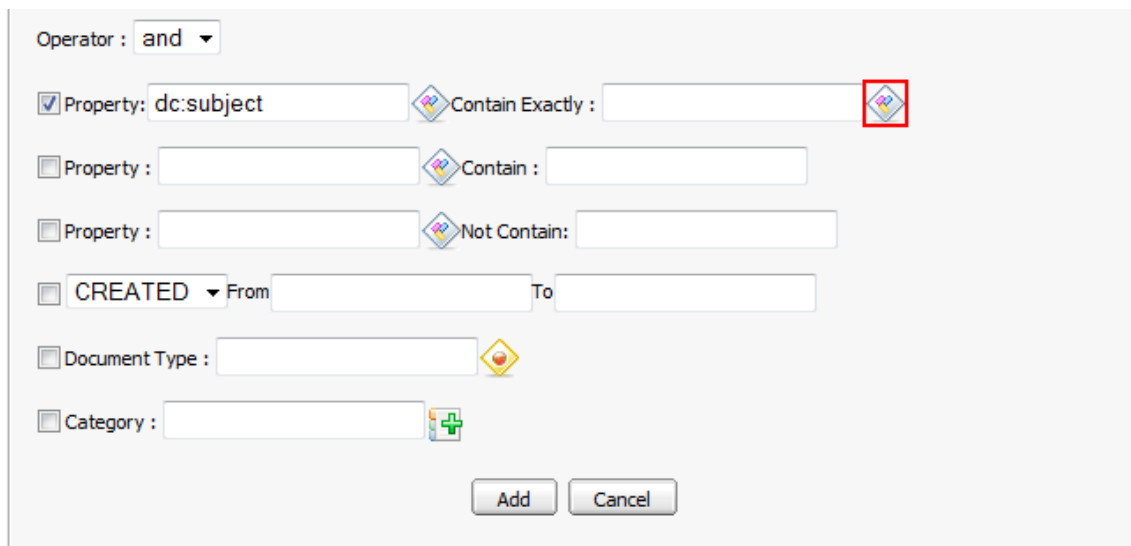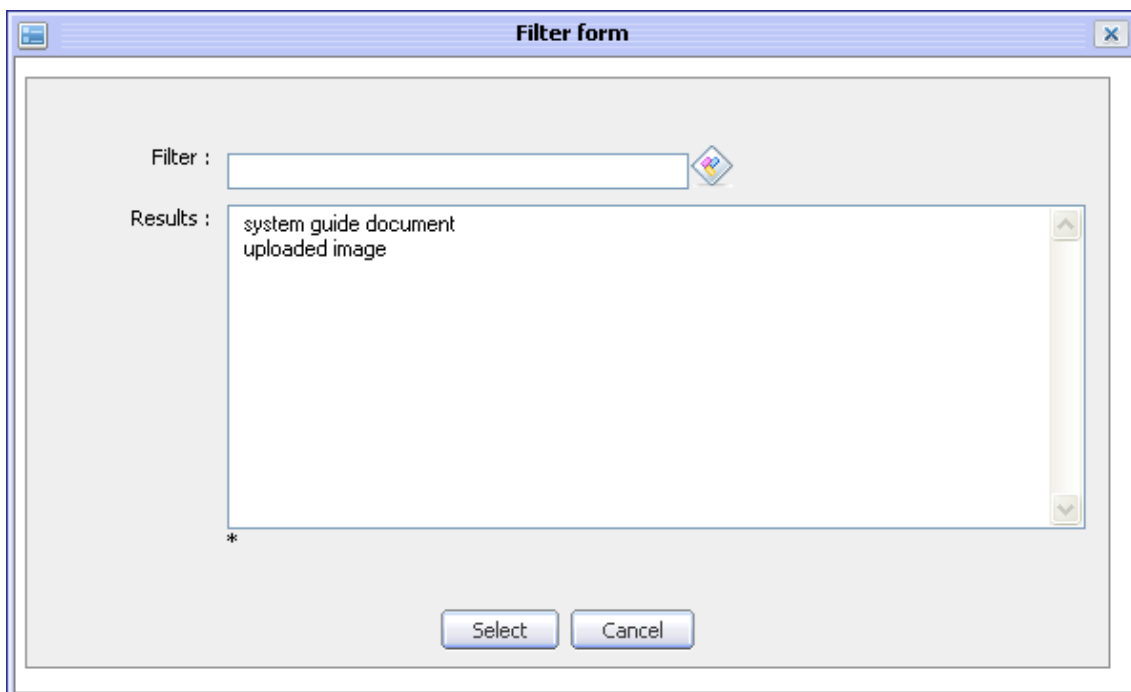
3. Select a property from the list and click **Add**. The selected property will populate **Property** field.

4. Define the property value to search for by entering a value into the **Contain exactly** field or click the **Find exactly** icon:

The **Filter form** will appear:

All pre-existing values for the property you selected will appear.

- If the value you require is in the list, select it and click **Select**.

- If the value you require is not in the list, enter it in the **Filter:** field and click

  icon. The value will populate the **Contain exactly** field of the constraints form.

Procedure 4.86. Add a constraint including or excluding values

1. Check the box corresponding to the **Contain** or **Not Contain** constraint, as appropriate.

2. Enter the required property in the **Property** field or click the **Add Property** icon
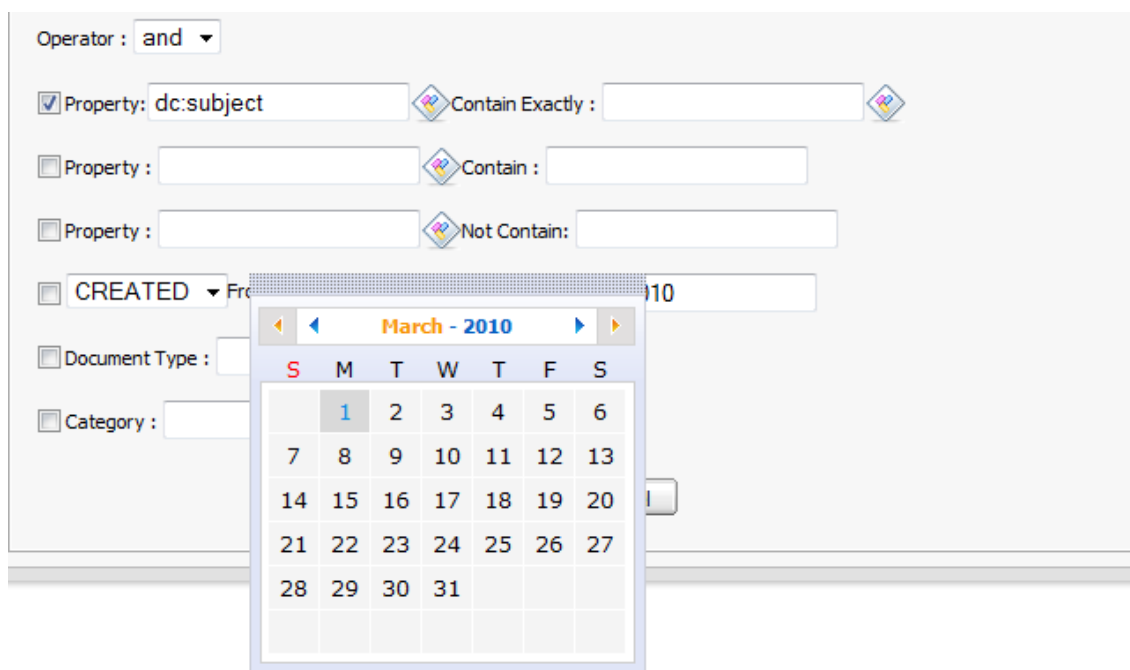
   (refer to **Step B** in *Add a constraint for exact values* for more information).

3. Enter the required values in the **Contain** or **Not Contain** fields.

Procedure 4.87. Add a constraint by date

1. Click the check box beside the field with the drop down menu (below the **Property** entries).

2. Define the search condition from the drop down list (**CREATED/MODIFIED**).

3. Click in the **From** field.

A small calendar will appear;

Select the date you want to use as a contraint.

4. Repeat the above steps for the **To** field.

The selected dates will populate the **From** and **To** fields in the **Add constraint** form.

Procedure 4.88. Add a constraint by document type

1. Click the check box beside the **Document Type** field.

2. Enter the document type you want to search for or click the

icon for a list of document types:
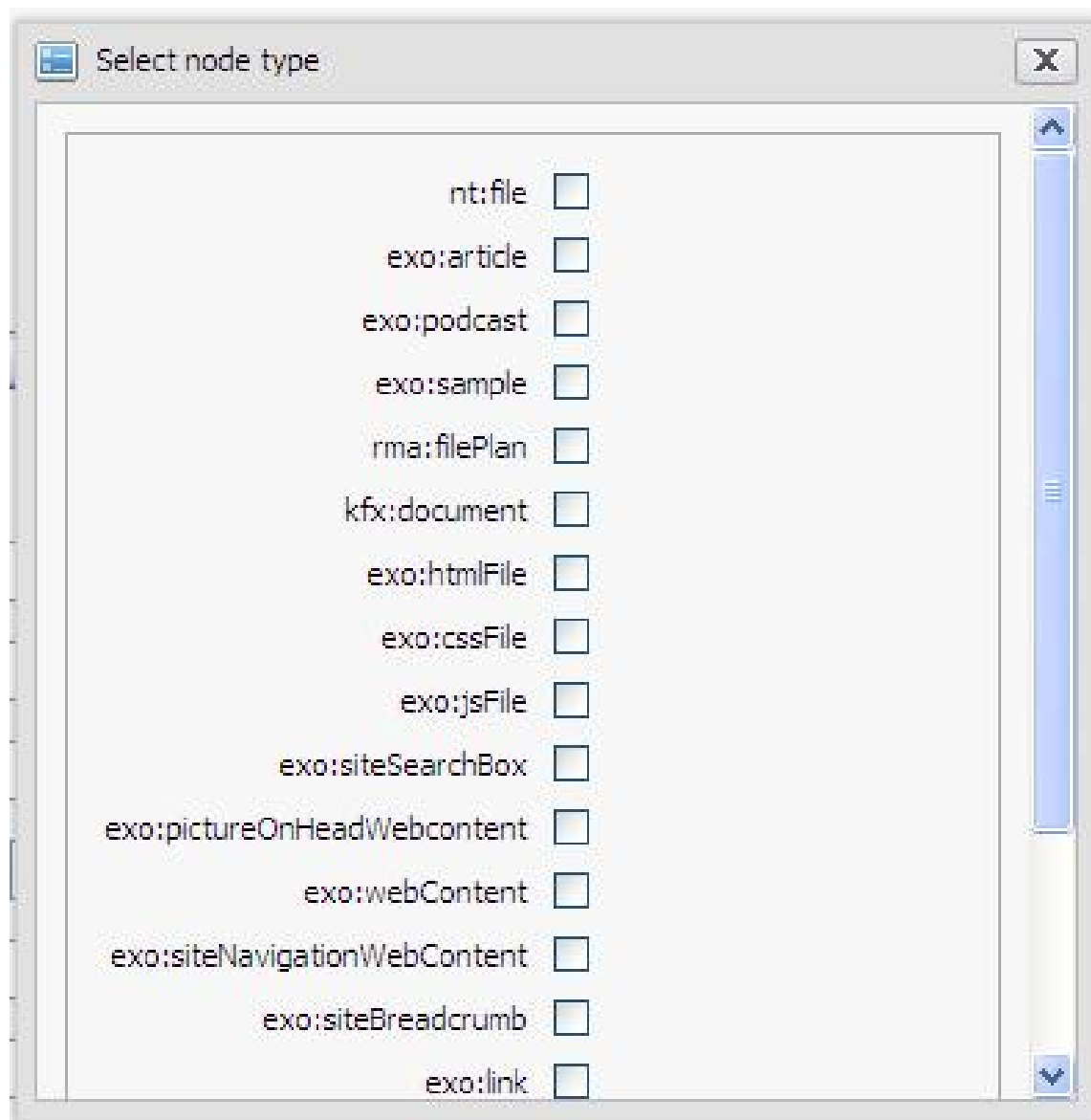
3. Click the check box of the document type you want and click **Save**.

   The selected document type will populate the **Document Type** field.

Procedure 4.89. Add a constraint by category

1. Click the check box beside the **Category** field.

2. Enter   the   category   you   want   to   search   for   or   click   the

   icon for a list of categories:

3. Click   the

   that corresponds to the category you want.

   The selected category will populate the **Category** field.

6. Click **Add** to add any/all activated constraints.

    The constraints will be converted to an **SQL** query and displayed in the search form:

    Remove unnecessary constraints with the

    icon.

7. Click **Search** to launch the search. Results will be displayed in the **Search Results** tab.

8. Click **Save** and give this search configuration a name if you want to save it for use at another time.

4.8.2.3. Search by creating a new query

You need a knowledge of the structure of query statements in order to configure a search using the parameters on the **New Query** tab

Procedure 4.90.

1. Enter a unique name for this query in the **Name** field.

2. Choose a query type from the drop down menu; **SQL** or **xPath**

3. Enter a query statement.

4. Click **Search** to perform the search and display the results in the **Search Results** tab.

    Or click **Save** to save the search query to the **Saved Query** tab.

    Or click **Cancel** to quit.

4.8.2.4. Search by existing queries

This tab lists all saved search queries (that you have access rights to use).
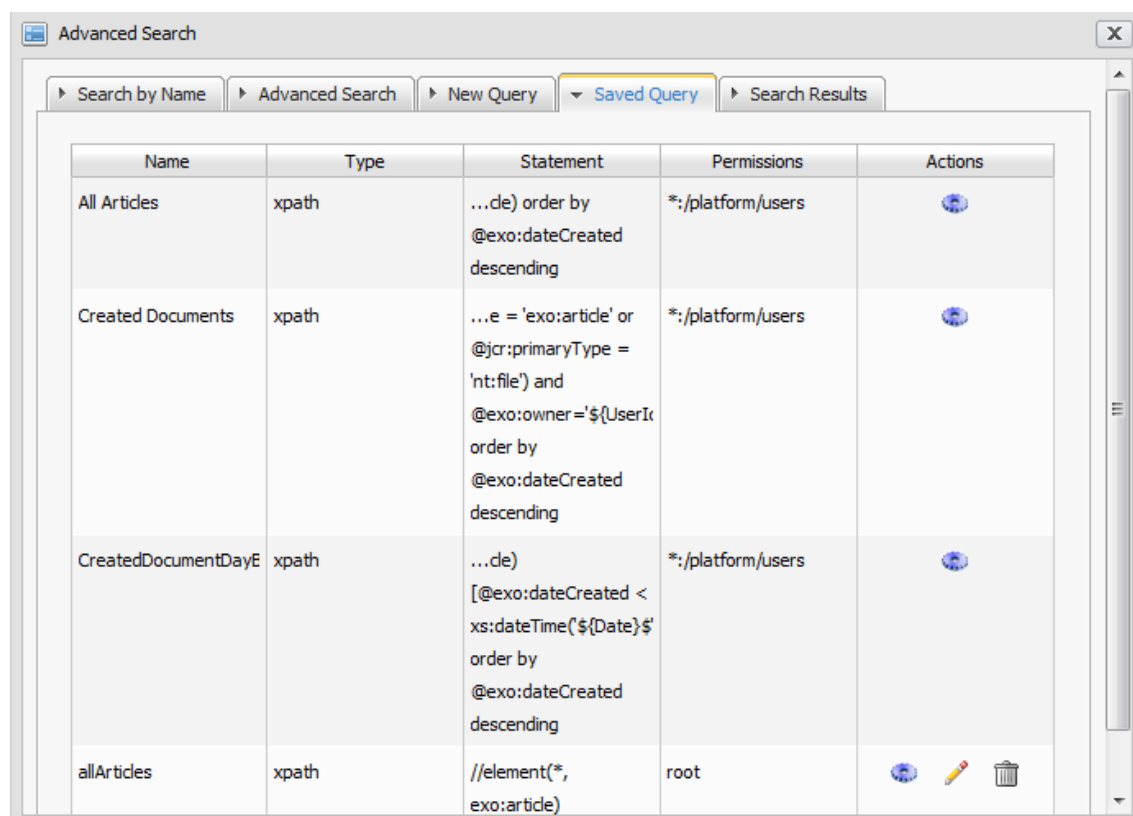
*   Click

    to perfom the search and see the results in the **Search Results** tab.

*   Click

to edit the query statement. The query form will appear as it does when creating a query (see *Section 4.8.2.3, "Search by creating a new query"*) however you cannot edit the name of the saved search.

- Click

to delete a query (provided you have access rights over that query).

4.8.3. Quick Search

To perform a quick search:

Procedure 4.91.

1. Click   the

   icon to see the list of existing queries.
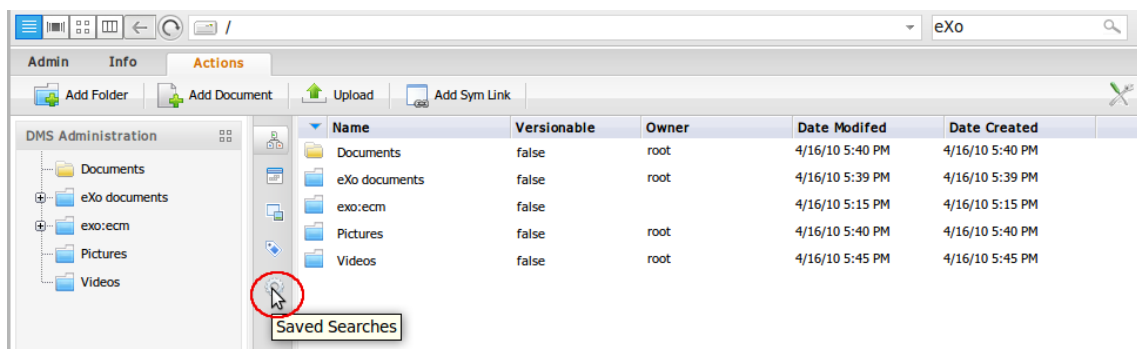
   A query list will appear. It contains the sections; **All Articles**, **Created Documents**, **CreatedDocumentDayBefore** and **allArticles**.
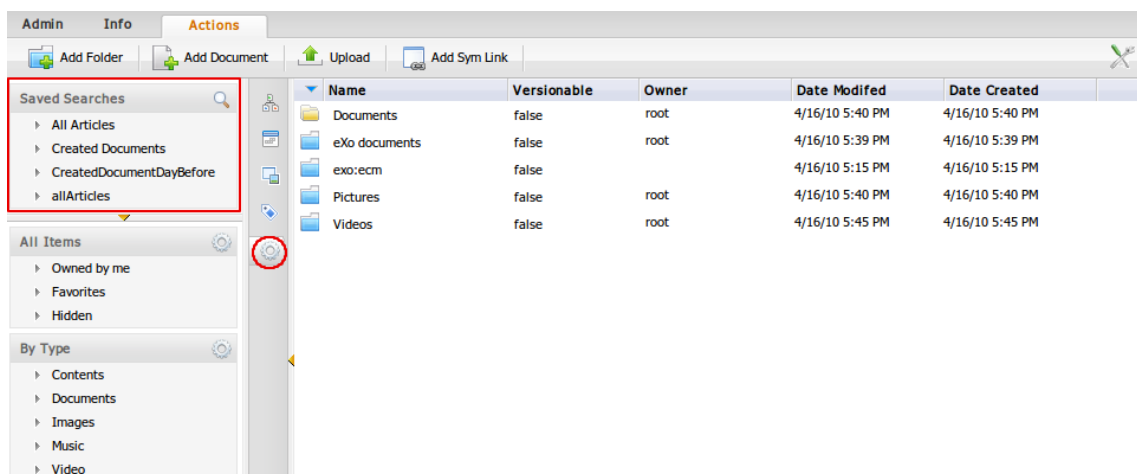
2. Launch, modify or delete the queries as required (see *Section 4.8.2.3, "Search by creating a new query"* for more information).

3. Filter results with the entries in the **All Items** and/or **By Type** panes on the left of the tab. Items matching the selections will appear in the right pane.

4. Click on the required document or folder name to view and or download them.

4.9. Preferences

This function is used to set up your browsing preferences.
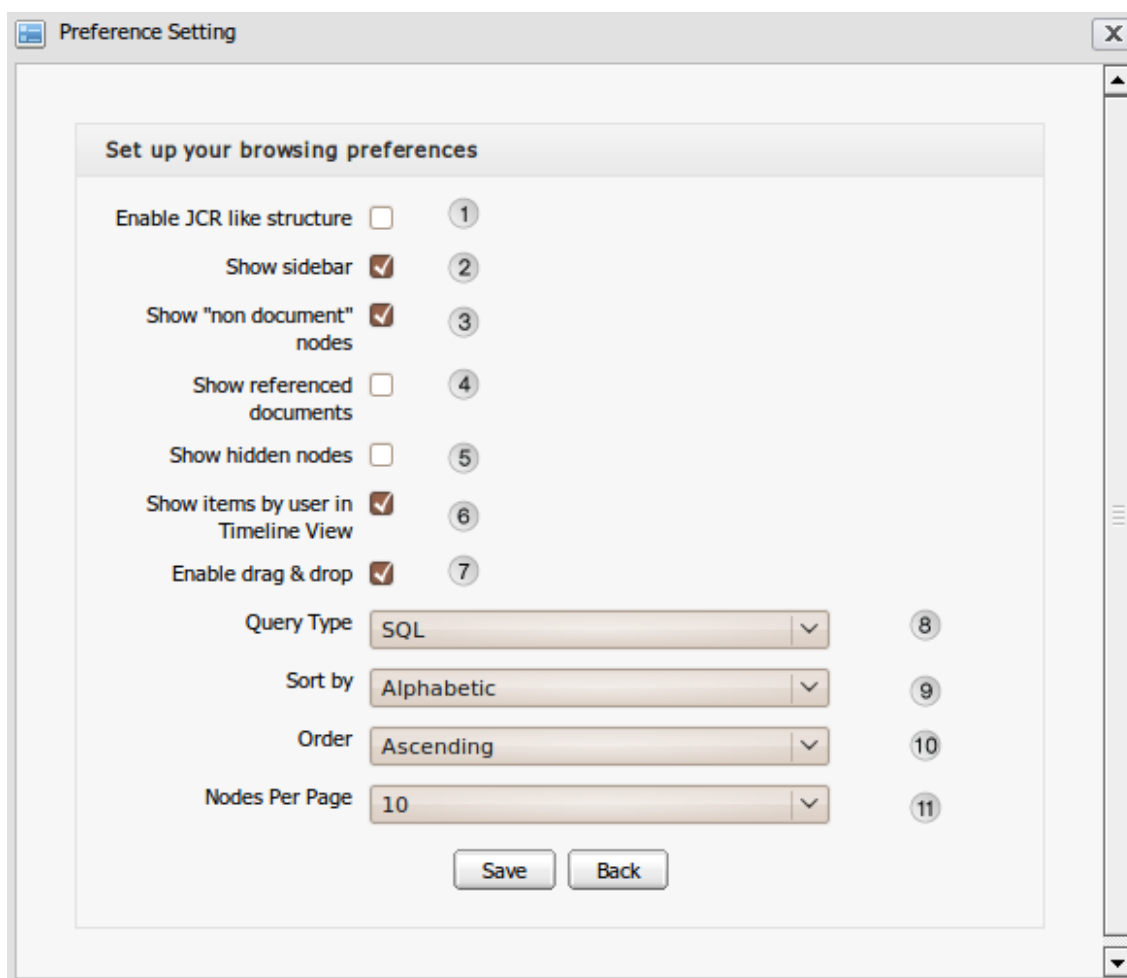
Procedure 4.92.

1. Click   on

    on the right side of the **Sites Explorer** portlet.

    The **Preference Setting** window will appear:

Table 4.16.

Setting	Details
Enable JCR like structure.	This option is to display nodes in a document in tree structure.
Show sidebar	This option is to display a sidebar.
Show non document nodes	This option is to display nodes that are non–documents.
Show referenced documents	This option is to display referenced documents.
Show hidden nodes	The option is to display hidden nodes.
Show items by user in Time line View	This option is to display items by a user or not in Timeline view.
Enable drag and drop	This option is to allows taking the "drag and drop" action or not.
Query Type	This query type.
Sort by	This condition is used to sort nodes in nodes list.
Order	This type of the sorted order.
Nodes per page	This number of nodes that will be displayed per page.

2. Configure the preferences as required and click **Save** to set them.

   Or click **Back** to quit without submitting changes.

4.10. Newsletters

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

4.10.1. Newsletter Viewer

Users instantly get newsletters from your email in order to update the newest information about categories and subscriptions that users frequently care about.

Follow these steps to subscribe to newsletters from exoservice:

1. Go to Newsletters on the navigation bar. The Newsletters page will appear:
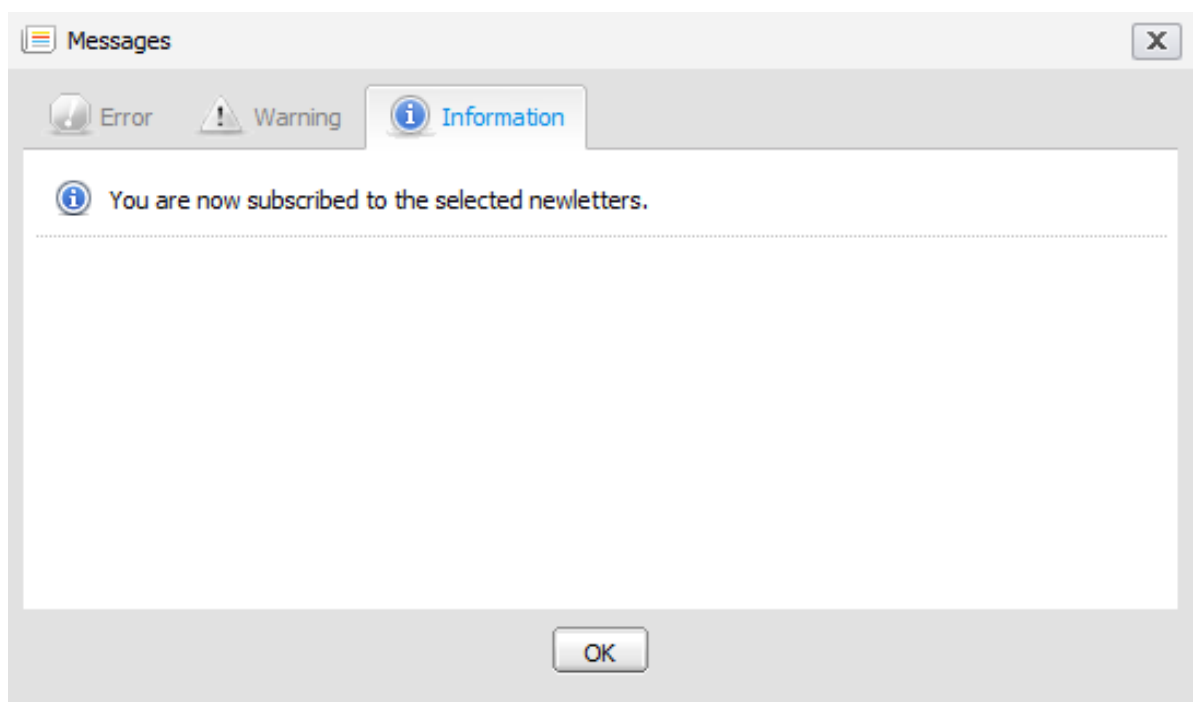
2. Enter your email address in the Your Email field.

3. Select the check box corresponding to the subscription that you want to get newsletters.

4. Click Subscribe. A message informing that you have just subscribed to the selected newsletter will appear.

5. Click OK in the confirmation message. You can reselect the subscription that you want or do not want to receive newsletters by re-selecting the check box in the Check to subscribe column.

6. Click Change your subscriptions to update your changes.

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

4.10.2. Newsletter Manager

WCM facilitates administrators to easily and quickly manage and control newsletters. Go to Groups | Newsletter Manager on the Administration bar to reach the Newsletter Manager.
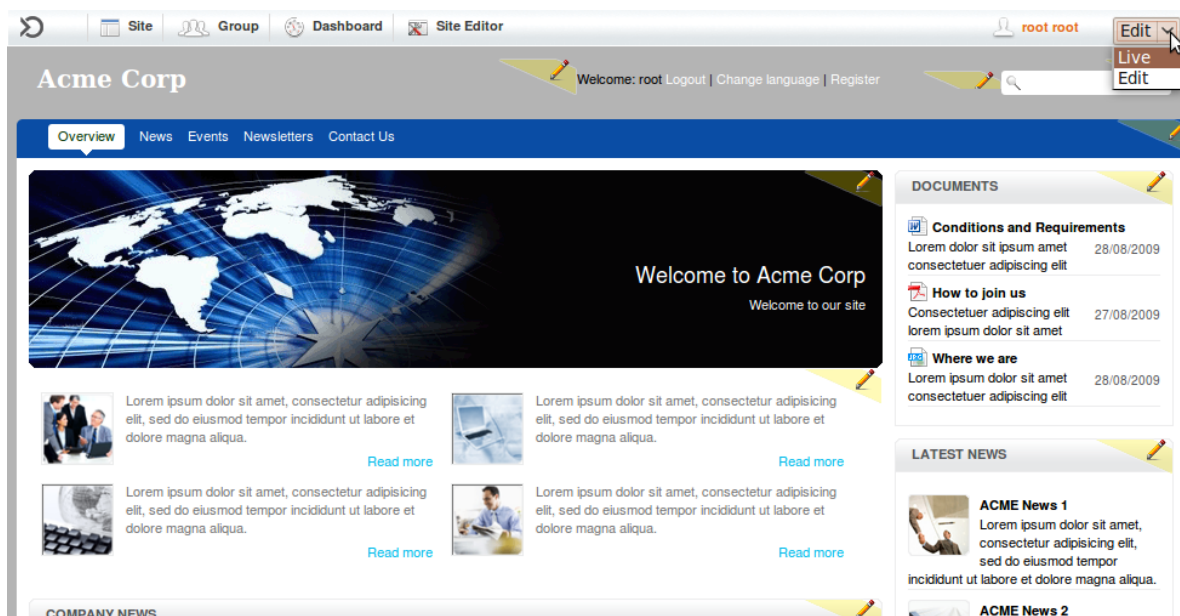
4.10.2.1. Category

This section details category management.

4.10.2.1.1. Add a new category

Procedure 4.93. Add a new category

1. Click New Category on the action bar of the Newsletter Manager page. The Category form
    will appear.

Table 4.17. Category Form Field Details

Field	Description
Name	The name of a category. This field is required.
Title	The title of a category. This field is required.
Description	A brief description of the category.
Moderator	Allows an administrator to select which memberships what group can manage this category.
Save	Accepts the addition of a new category.
Cancel	Quits the category form without adding a category.

2. **Input values for fields**

Select a moderator for a category by clicking

next to the Moderator field to select a user. The User selector form will appear.
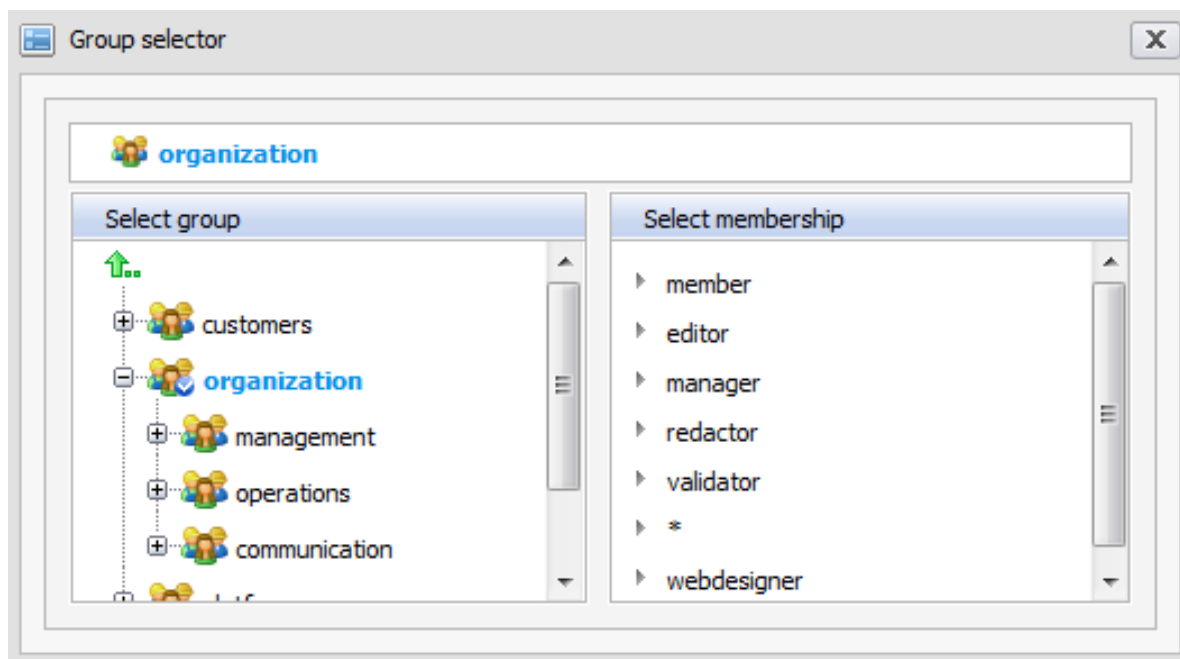
3. Click

to select a user in the list.

4. Click

to select users in a specific group. The Group selector will appear.

Select a group from the left panel and a membership type in the right panel. The membership and group selected will be displayed in the Moderator field. After adding new categories, they will be added in the list of categories.

5. Click the category that you want to manage, for example, the Fashion category.
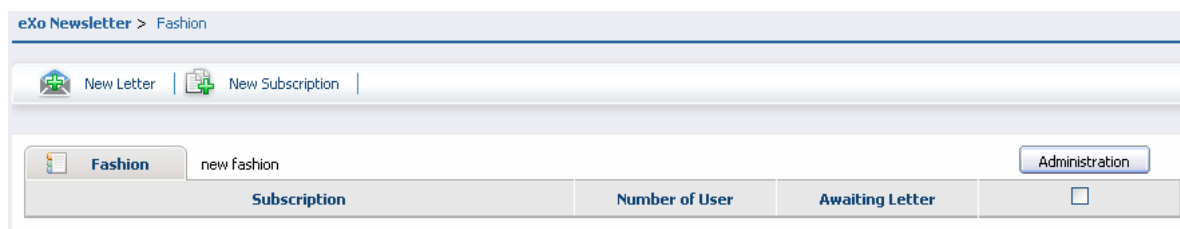
Here you can create new subscriptions or newsletters for this category.

6. Click the Administration button to open the menu that lists all actions that an administrator can take on this category.

4.10.2.1.2. Edit a category

1. Click on Administration | Edit Category to bring up the Category form.

Table 4.18. Category Form Field Details

Field	Description
Name	The name of this category. This field cannot be changed.
Title	The title of the category. This field can be changed.
Description	A brief description of the category. This field can be changed.
Moderator	Allows an administrator to select which memberships in what group can manage this category by selecting membership and group. This field cannot be changed.
Save	Accepts the changes made to the category.
Cancel	Quits the category form without saving changes.

2. Change the values in the Title and Description fields as required.

3. Click Save to save all changes, or Cancel to quit without saving any change.

4.10.2.1.3. Delete a category

Procedure 4.94. Delete a category

1. Click **Delete category** in the menu. A confirmation will appear:
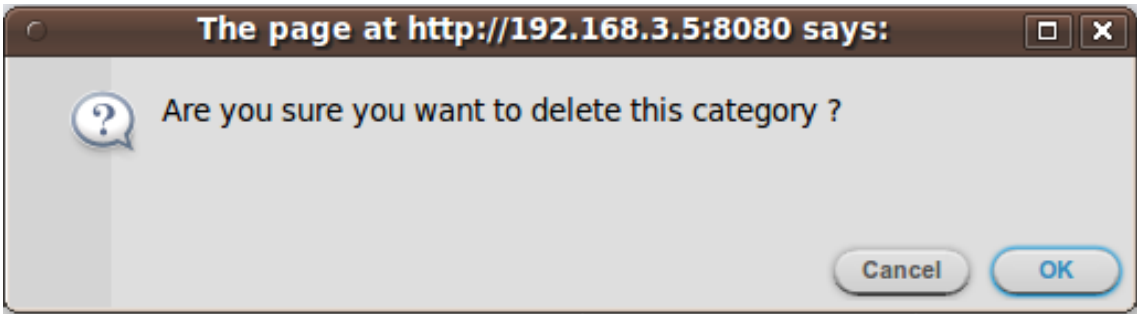
2.   Click **OK** to delete the category or **Cancel** to exit without deleting.

4.10.2.1.4. Manage Users

Administrators can manage users accounts and activity with *edit*, *ban*, *remove ban* or *delete* actions.

Procedure 4.95.

1.   Click **Administration | Manage Users** in the menu. the **Manage Users** form will appear:
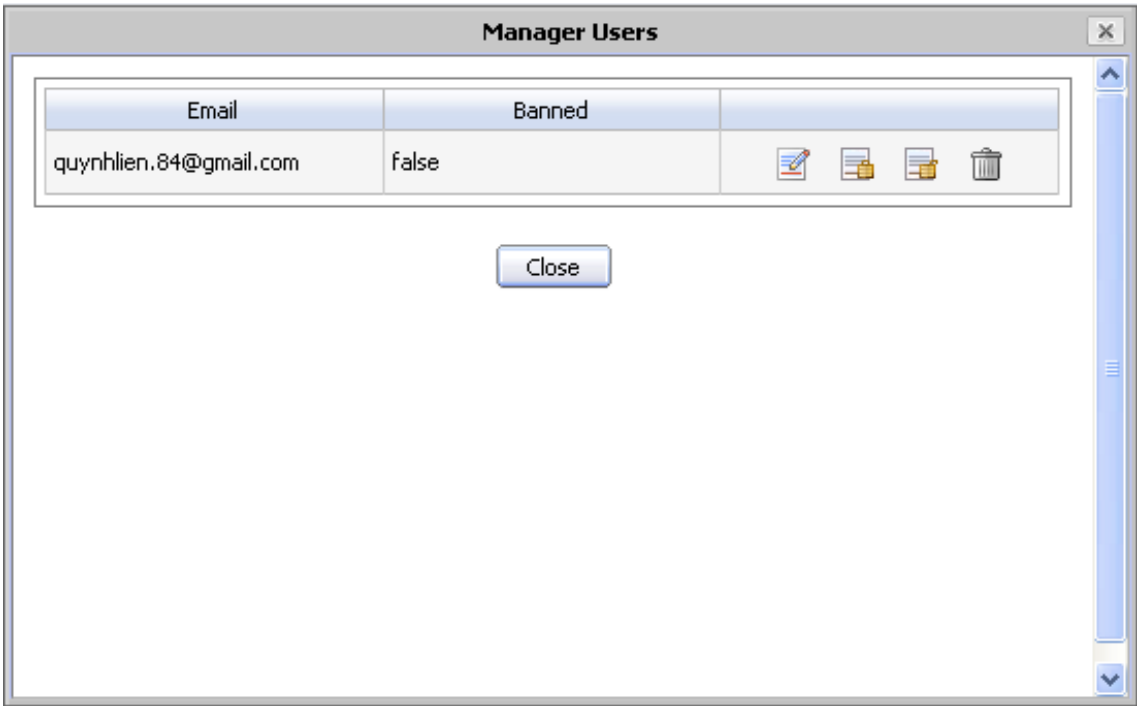
Table 4.19.

Field	Details
Email	The email address of user who has subscribed this subscription.
Banned	This field has two values:

Field	Details
	False
	The user is allowed to get email.
	True
	The user isn't allowed to get email.
	To edit this user.
	To ban this user from receiving email.
	To remove a ban on a user.
	To delete the user.
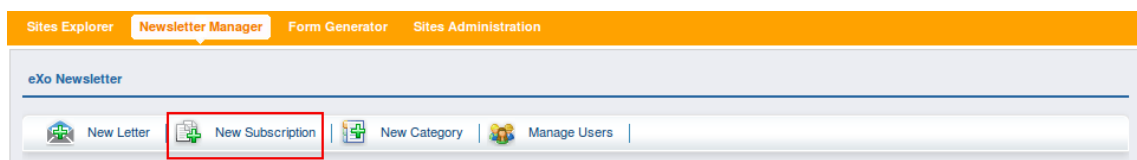
2.   Click **Close** to close the form.

4.10.2.2. Subscriptions

An administrator can add more subscriptions to any category. There are two ways to do this:

Procedure 4.96. Method One

1.   Click **New Subscriptions** on the Action bar.

    The **Subscription form** will appear:
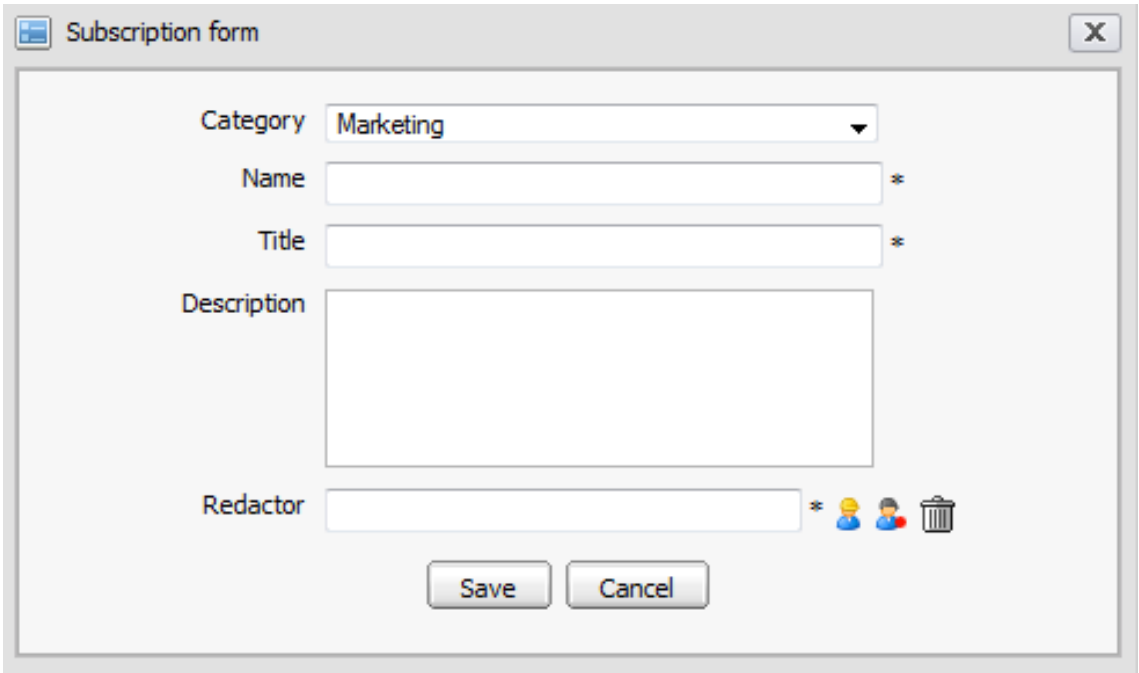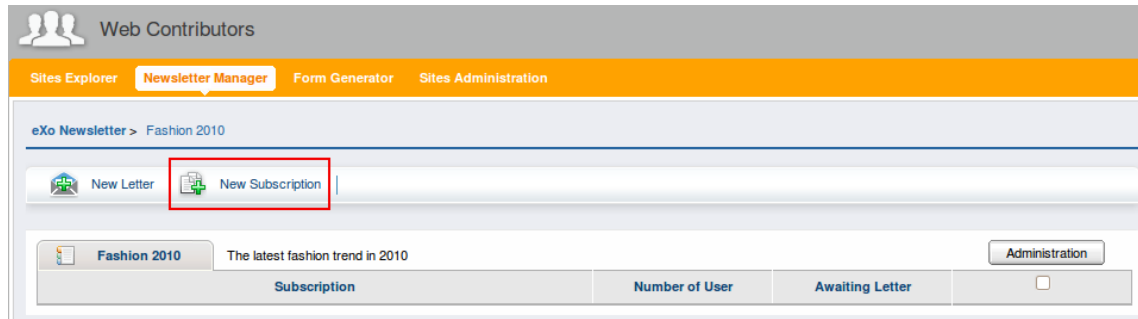
Table 4.20.

Field	Details
Category	The category that contains this subscription.
Name	The name of the subscription. This field is required.
Title	The title of the subscription. This field is required.
Description	The brief description about the subscription. This field is not required.
Redactor	Allows an administrator to select which memberships in what group can manage this subscription by selecting membership and group. This field cannot be changed.
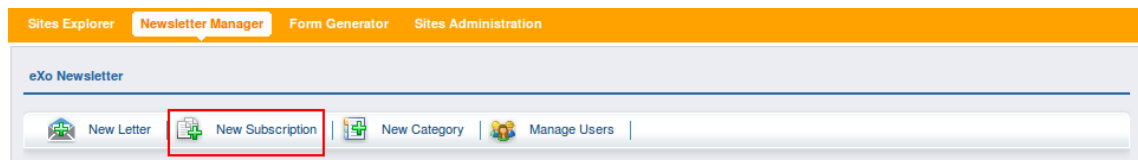
2. Click

    and select the category from the drop down menu.

3. Enter the rest of ther values in the form.

4. Click **Save** to create the new subscription or **Cancel** to quit without creating a new subscription.

Procedure 4.97. Method Two

1. Click directly on the category that you want to create a new subscription to:

2. Click **New Subscriptions** on the Action bar.
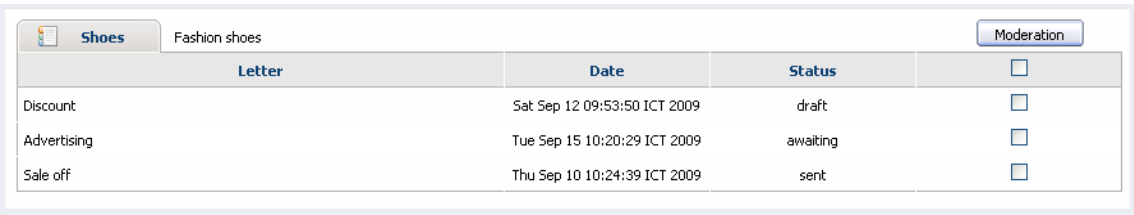
The **Subscription form** will appear:

Administrators can create newsletters for each subscriptions.

These Newsletters can be opened, edited, deleted or converted to a template for reuse.

Table 4.21.

Element	Details
Shoes	The name of the subscription.
Fashion Shoes	The brief description about the subscription.
Letter	The list of all letters of this subscription.
Date	The date and time when creating this letter.
Status	There are three types of status: draft, awaiting and sent.
Moderation	This button allows you to take actions on a newsletter that you select.

4.10.2.3. Open a Newsletter

Administrators can easily view the content of a newsletter.

Procedure 4.98.

1. Choose a category by left-clicking it or checking the box and then selecting **Administration | Open**.
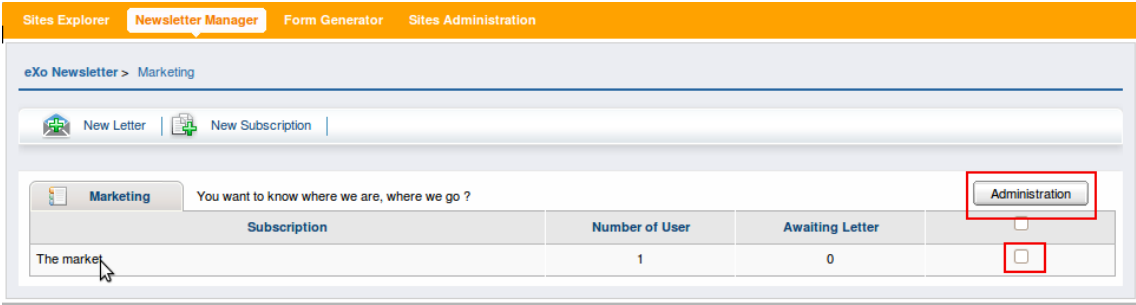
2. Select the newsletter that you want to open by left-clicking it, or selecting the checkbox.
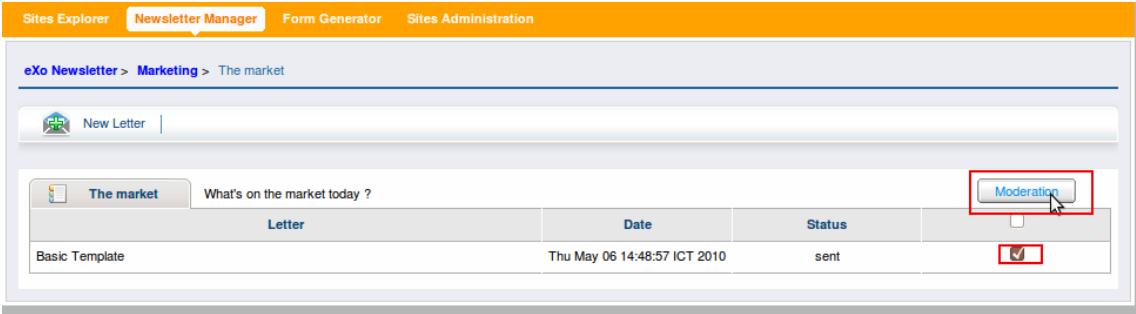
3. Click   the
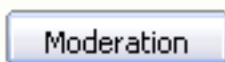
button, then select **Open** in the menu:
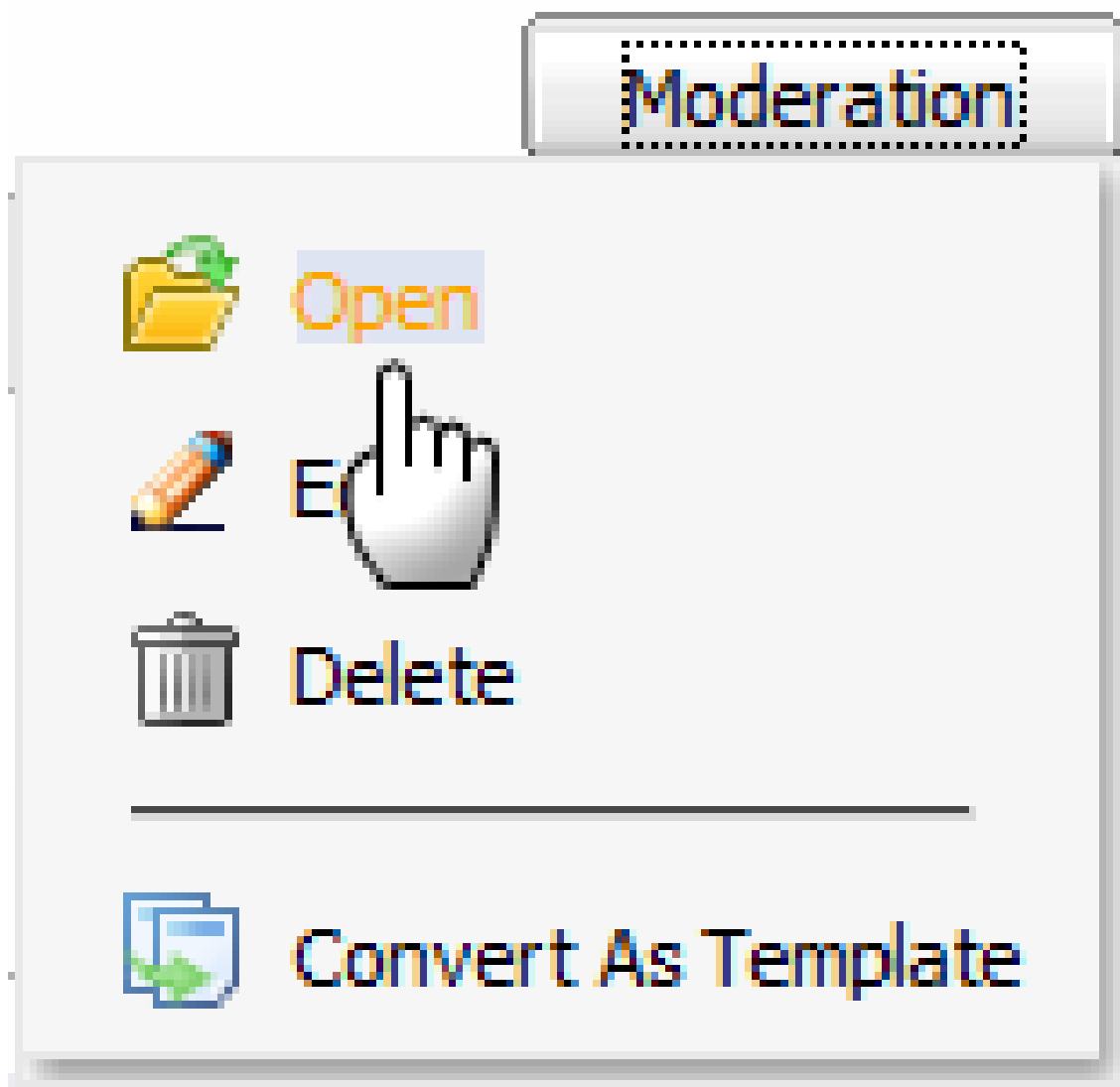
The **View Newsletter's Content** form will appear:
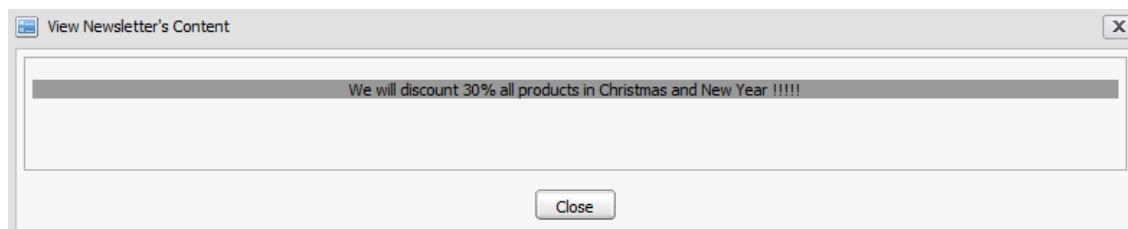
4. Click **Close** to exit.

4.10.2.4. Edit a newsletter

Do the following to edit a newsletter.

Procedure 4.99. Edit a newsletter

1. In a specific subscription, select the newsletter you want to edit by selecting the checkbox.
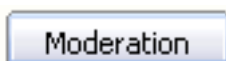
2. Click

   , then select **Edit** in the menu.
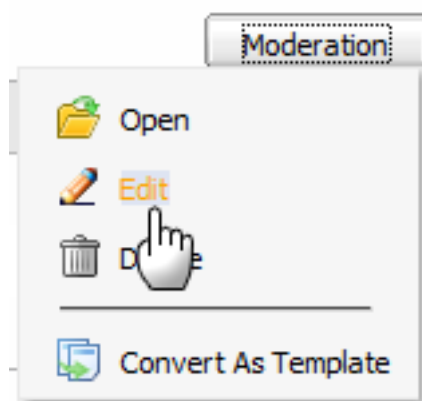
   The **Newsletter entry form** will appear:

3. Change the values in the fields that you want to edit: **Template**, **Send date**, **Category**, **Subscription**.

4. Click the **Update a Newsletter's info** button.

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

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

4.10.2.5. Delete a newsletter
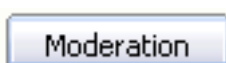
Administrator can delete obselete newsletters.

Procedure 4.100. Delete a newsletter

1. In a specific subscription, select the newsletter that you want to delete by selecting the checkbox.
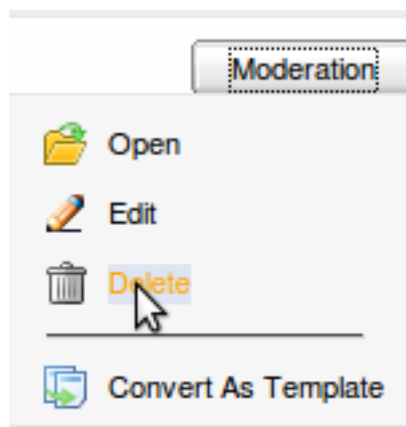
2. Click

    , then click **Delete** in the menu.

    The confirmation message will be displayed:
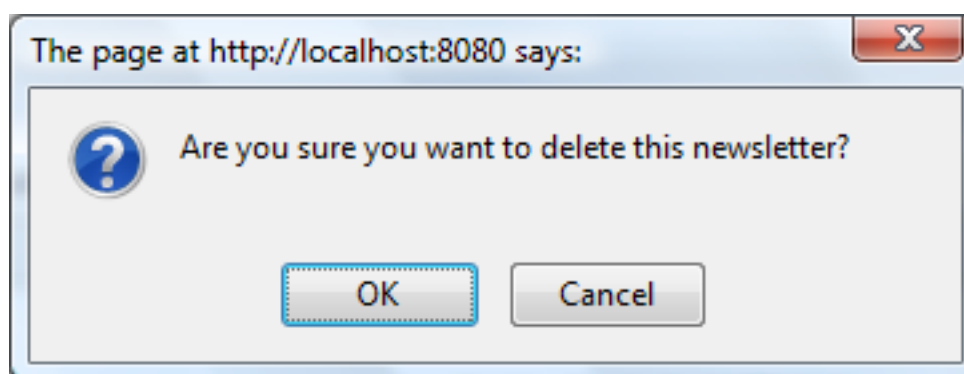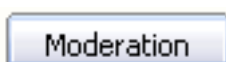
3. Click **OK** to accept deleting this newsletter, or **Cancel** to quit without deleting.

4.10.2.6. Convert as Template

The administrator can reuse the template of the frequently used newsletter template.

Procedure 4.101. Convert to template

1. Select the newsletter that you want to create as a template.

2. Click

    , then select **Convert as Template** in the menu. The next time when you create a newsletter, this template will be listed in the **Template** field in the **Newsletter entry form**.

4.10.2.7. Newsletters

Each subscription consists of many newsletters. **WCM** helps you easily create newsletters by following these steps.

Procedure 4.102. Creating Newsletters

1. Go to **Groups | Newsletter Manager** on the Administration bar. The eXo Newsletter appears.

2. Click

   on the action bar. The **Newsletter entry form**will appear:

Details:

Table 4.22.

Field	Details
Template	The template that you select for your newsletter form.
Send date	The date and time when you want to send this newsletter.

Field	Details
Category	The category contains this newsletter.
Subscription	The subscription contains this newsletter.
Update sending parameters	This button allows you to update information about this newsletter.

3. Click

   to select the template for the newsletter.

4. Click the **Send Date** field. The calendar will appear to allow you to choose the date and time when you want to send the newsletter.
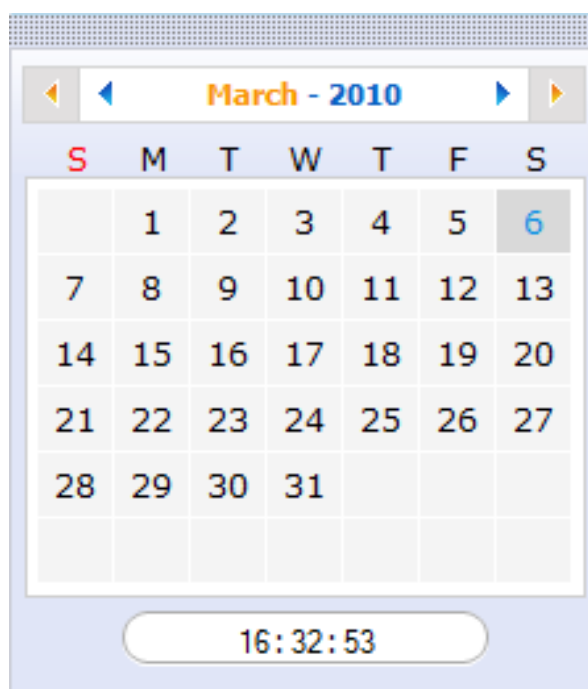
5. Click

   in the category field to select the category and the subscription in list.

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

7. Input a title of a newsletter into the **Title** field.

8. Create a content for a newsletter by inputting information into the **Main content** textbox.

9. Click **Save** to save this newsletter as draft, or click **Send** to send this newsletter.

10. Select **Contact Us** on the navagation bar, or go to **Site | Acme | Contact Us**.

The **Contact Us** page will appear:

Table 4.23.

Field	Details
Select a recipient	The recipient who will receive a message
Your name	The name of a person who leaves a message
Your address	The address of a person who leaves a message
Your Email Address	The email address of a person who leaves a message
Your Phone Number	The phone number of a person who leaves a message
Your message	Write a message that you want to leave

11. Select a recipient and enter values in this form.

12. Click **Save** to save a message.

4.11. Fast Content Creator

Site Publisher provides users with the **Fast Content Creator** portlet that allows users to create document content quickly. The Fast Content Creator portlet is applied in the **Contact Us** on the navigation bar:

Procedure 4.103.

1.   Go to **Contact Us** on the Navigation bar or go to **Site | Acme | Contact Us**.

    The **Contact Us** page will appear:

Table 4.24.

Field	Details
Select a recipient	To choose people who will receive the message.
Your Name	To type the name of person who leaves a message.
Your Address	To type the address of person who leaves a message.
Your Email Address	To enter the email address of person who leaves a message.
Your Phone Number	To enter the phone number of person who leaves a message.
Your Message	To write a message that you want to leave.
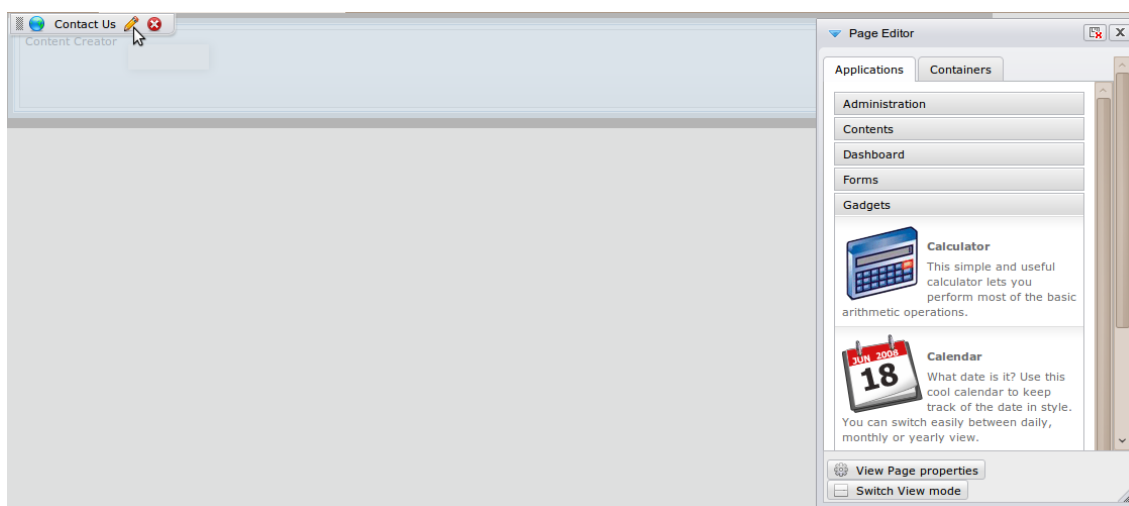
2.   Select a recipient and cokplete the other values in the form.

3.   Click **Save** to send a message.

4.11.1. Edit Mode

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

Procedure 4.104.

1.   Go to **Contact Us** on the Navigation bar or go to **Site | Acme | Contact Us**.

2.   Click Site **Editor | Edit Page** on the administration bar. The **Page Editor** will be displayed.

3.   Click the edit icon to open the **Edit Mode** tab in the **Contact Us** portlet.

     The **Edit Mode** tab appears:

Table 4.25.

Field	Details
Location to Save	Select the location for saving documents or messages.
Select Template	Choose available templates for documents. There are corresponding fields to each template.
Custom Save button	Change the label for the save button.
Custom Save message	Show a custom message that informs you have just saved a document.
Redirect	Allow users to redirect the path in the Redirect path field.
Redirect Path	Show a path that a user will be directed to after he/she clicks OK in the confirmation message.
Actions	Add another actions to documents.

4. Click   the

to search for the location to save documents. The **Select Location** form appears:

5. Select   the   parent   node   on   the   left   panel   and   click   the

in the **Action** column to choose the child node on the right panel. After being selected, this location will be displayed on the **Location to save field**. Created documents will be saved in this location.
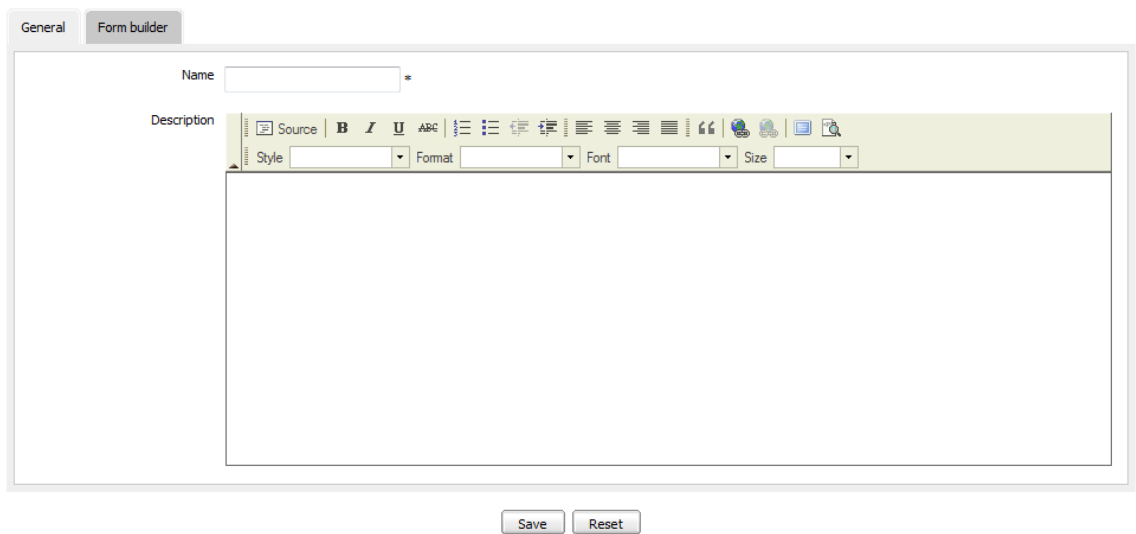
6. Select a template for documents by clicking .

7. Change the label for **Save**, and the message content after clicking **Save**.

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

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

4.12. Form Generator

The **Form Generator** portlet allows users to create and to edit template of document types. Documents are stored in the so-called node; therefore, the term "node" and node types are often applied.

Procedure 4.105.

1. Go to **Group | Form Generator** on the **Administration** bar. The **Form Generator** will appear:

2. Enter the node name into the **Name** field. (* Required)

3. Enter a brief description about the node.

4. Click the **Form builder** tab that allows users to set properties for a node. Available components are displayed on the left panel.
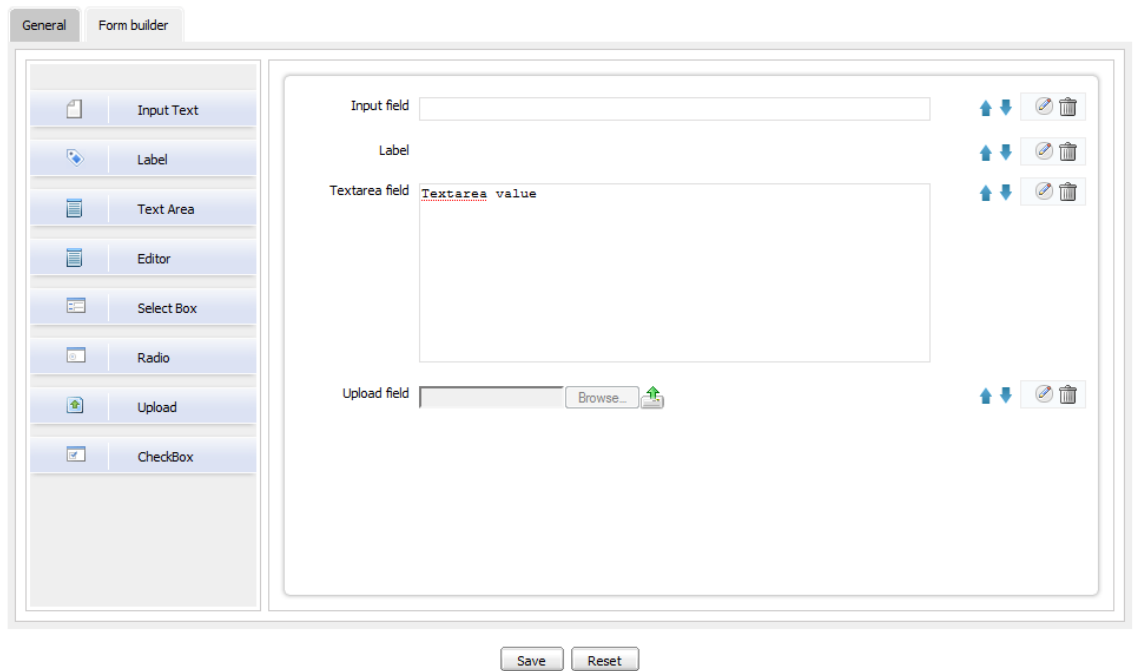
5. Click the desired components on the left panel. The selected components will be displayed on the right panel.

6. Click   the

    corresponding   to   the   component   to   move   this   component   up   or   the

to move the component down.

7. Click   the

that corresponds to the component to edit properties of that component. The form to edit
properties appears like the illustration below:

Table 4.26.

Field	Details
Field Label	To enter the field label.
Width	Enter the field width. If the checkbox in is marked the will appear beside the text box, indicating that values in this box are required.
Height	Enter the field height.
Default Value	To display the dafault value
Guidelines for User	To display instructions about this component.

To   delete   the   component   click   the

corresponding to the component.

8.   Click **Save Form** to save the form that you have created for nodes.

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

4.13. Categories

When implementing the Category, users will actually enjoy nice features via the Category model. Thanks to the symbolic link, no matter where the object physically resides, the database can retrieve it. In addition, the relations amongst shortcuts can be managed. Now, you can view documents or web content in the Parameterized Content List Viewer in such an easy way.

Procedure 4.106.

1.   Go to **News** on the navigation bar:
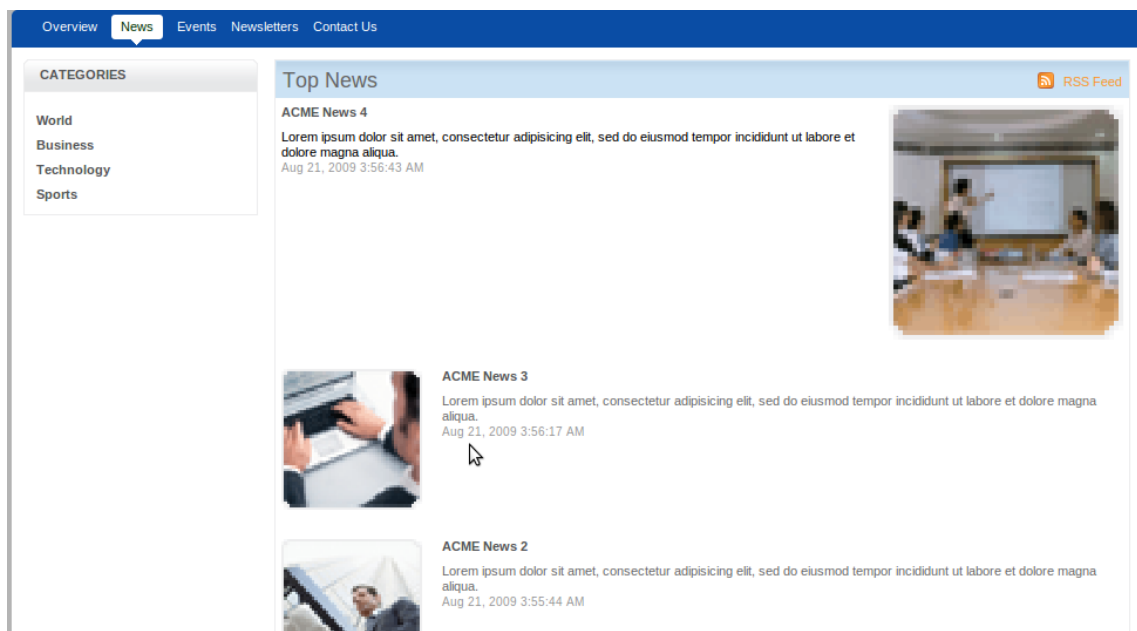
The left pane lists all the sub-catgories containign documents or web-content.

The right pane displays the documents selected in the left pane.

2.   Select a category that you want to view on the left, it will be shown on the right (only documents or web content published are shown).

4.13.1. The Edit Modes of Category Navigation portlet

Administrators can edit the Category Navigation portlet with the following process:
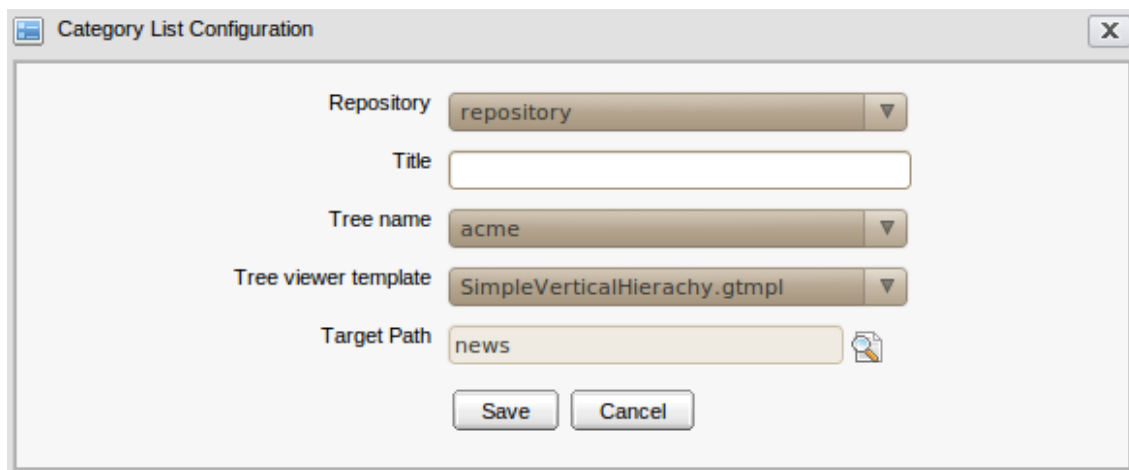
Procedure 4.107.

1. Go to **News**, then turn on the Edit mode. Click the

   on the Category panel.

   The Category List Configuration will appear:

2.

4.13.2. The Edit Mode in Parameterized Content List Viewer

Users are entitled to edit the settings in the Parameterized Content List Viewer portlet.

Procedure 4.108.

1. Turn on the Edit mode of a site.
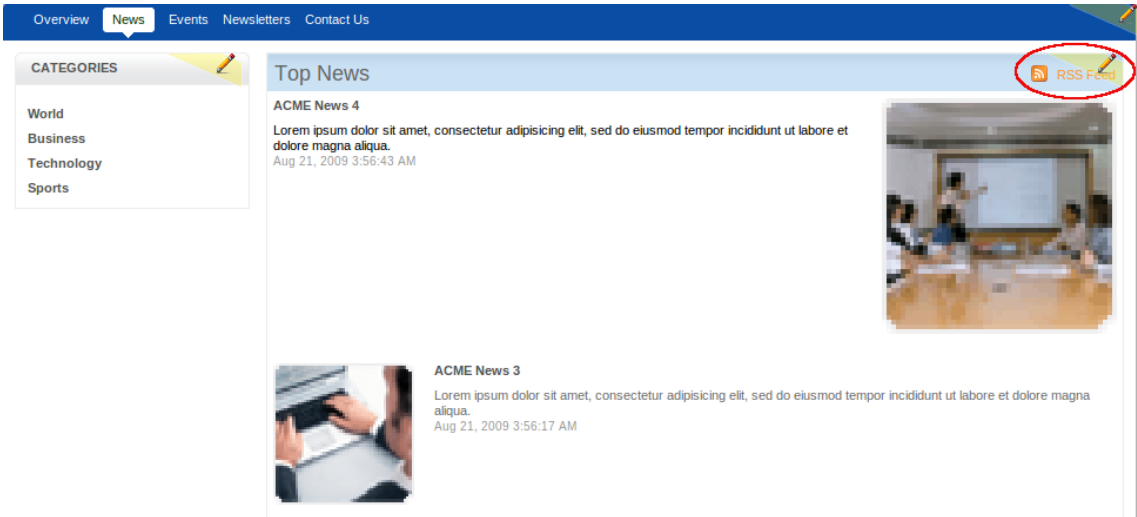
2. Click   the

    icon at the upper right corner of this panel, the edit form of Parameterized Content List Viewer
    will be displayed:

Table 4.27.

Field	Details
Order By	To choose types of order priority for documents or web-content. The "descendant" means documents or web-content are arranged according to the increasing order; meanwhile the "ascendant" means documents or web-content are arranged according to the decreasing order.
Header	To enter the topic containing documents or web-content. You can use the default header to let the portlet define the Header from the category URI.
View Template	To choose the template in which documents or web-content will be displayed for viewing.
Paginator template	To choose the template in which documents or web-content will be arranged.
Items per page	To enter a number of documents or web-content that will be displayed per page.
Show title	To allow showing titles of documents or web-content.
Show header	To allow showing headers of documents or web-content.
Show refresh button:	To allow showing the refresh button.
Show illustration	To allow showing images of documents or web-content.
Show date created	To allow showing the date when documents or web-content are created.
Show read more	To allow showing more documents or web-content.
Show summary	To allow showing summaries of documents or web-content.
Show link	To allow showing the title of document or web-content.
Show RSS link	To allow showing the RSS link containing documents or web-content.
Target page	The page that users want to link the content to.

3. Select the type and the order displaying document content or web content by selecting the **Order by** field, and **Descendant** or **Ascendant** checkbox.

4. Click

    ⌄

    to select the template for Viewer and Paginator.

5. Input the number of items that will be displayed per page in this portlet.

6. Select/unselect the checkboxes, including **Show title**, **Show header**, **Show Refresh** buttons, etc.

7. Click   the

    🔍

    icon to select the target page. The Page selector form will appear:

Click

    ▼

    to select the navigation, the corresponding pages will be displayed on the left panel and the corresponding path will be displayed on the right panel.

Click   the

    ✓

    that corresponds to the selected path on the right panel to select the path. The selected path will be displayed in the Target Path field.

8. Click **Save** to accept changes, or **Cancel** to quit without saving.

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

Advanced Actions

5.1. Set Up a Website

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

5.1.1. Create a new site

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

Do as follows:

Procedure 5.1.
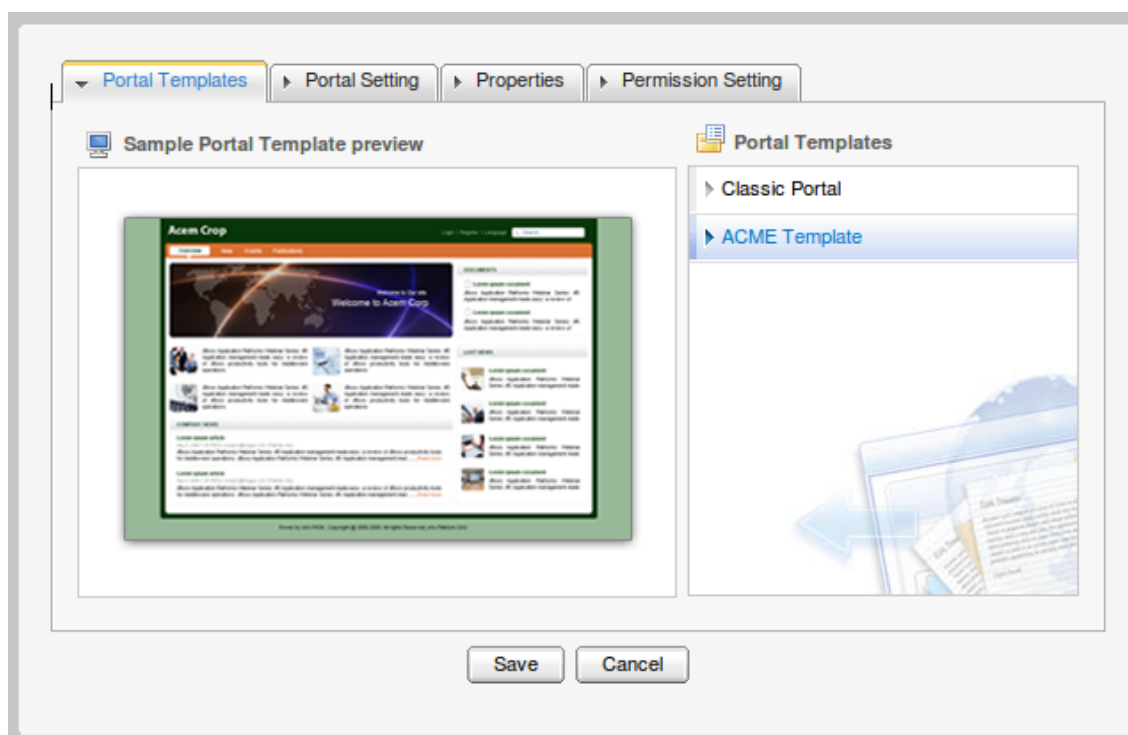
1. Click Site on the administration bar.
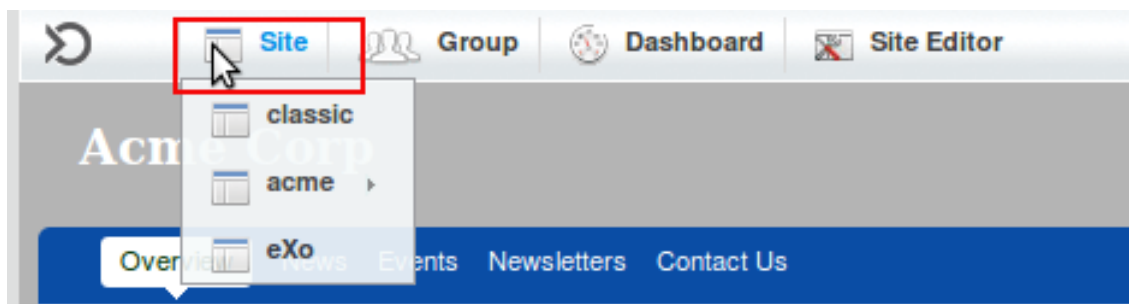
2. A list of existing portals will be listed. Click the Add New Portal button to open the Add new portal form:
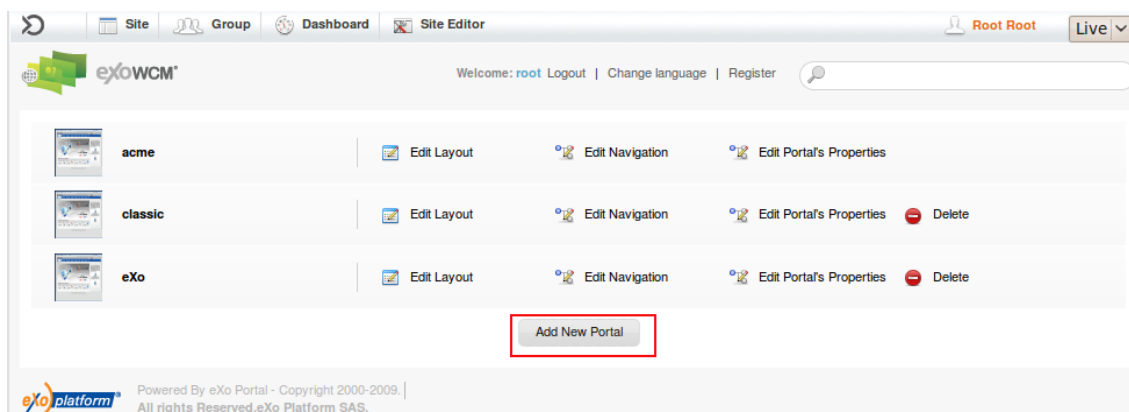
The add new portal form appears:

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

4. Click the Portal Setting tab to set some properties for this site:
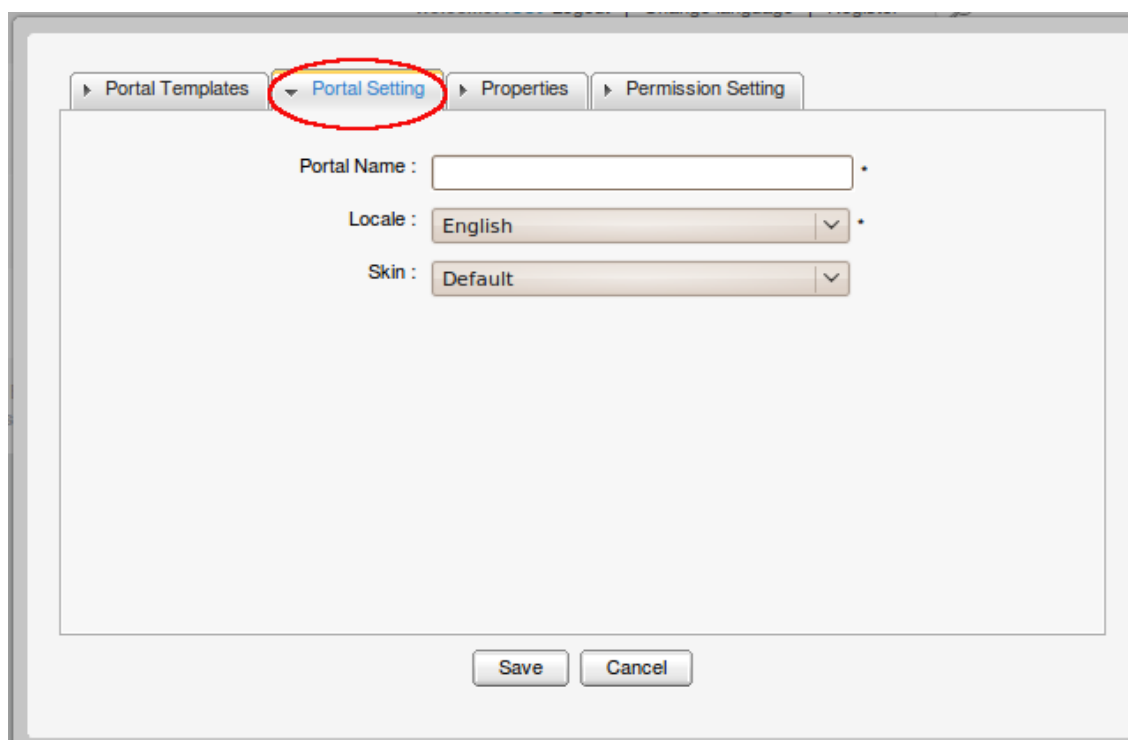
(*): required

Table 5.1. Details:

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

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

    The Keep session alive option means keeping the working session for a long time to avoid the working time out. There are 3 options:
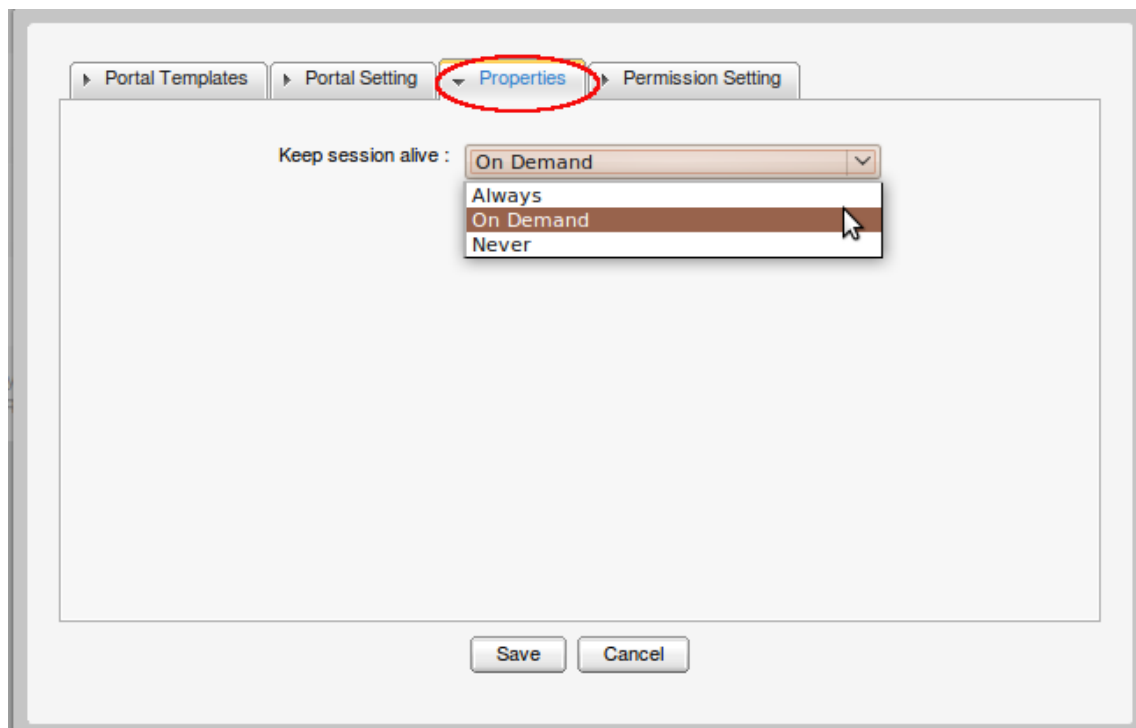
    never:
        it never happens even if the application requests

    on demand:
        it starts to be used as soon as the application requests

    always:
        it's always enabled (which has a cost but the administrator will be aware of that)

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

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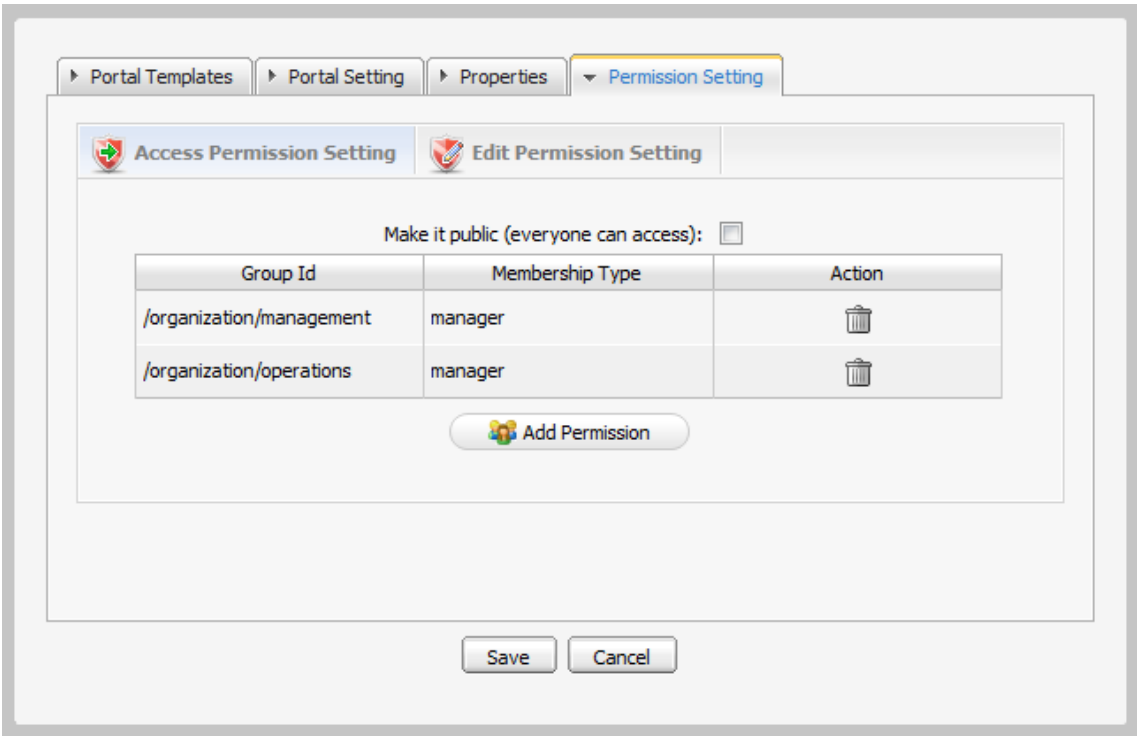
Access Permission Setting tab

By default, the access permission list of the portal is empty:

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

After selecting groups, the access permission list is displayed:
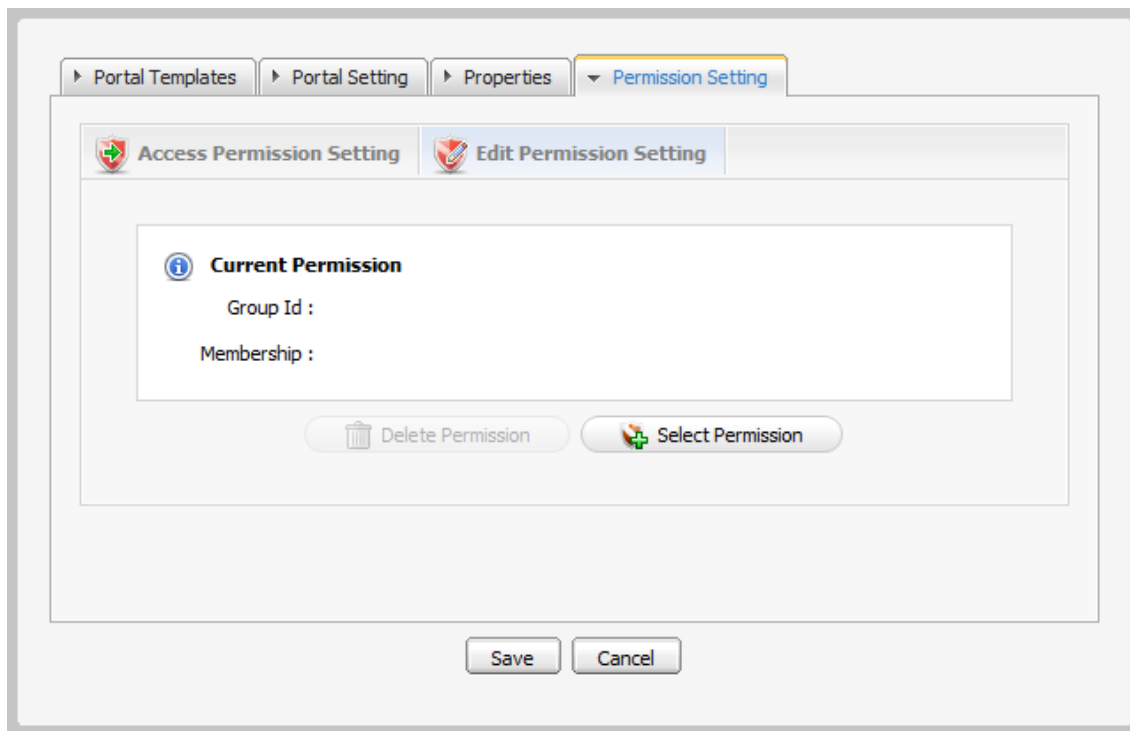
In   which,   the
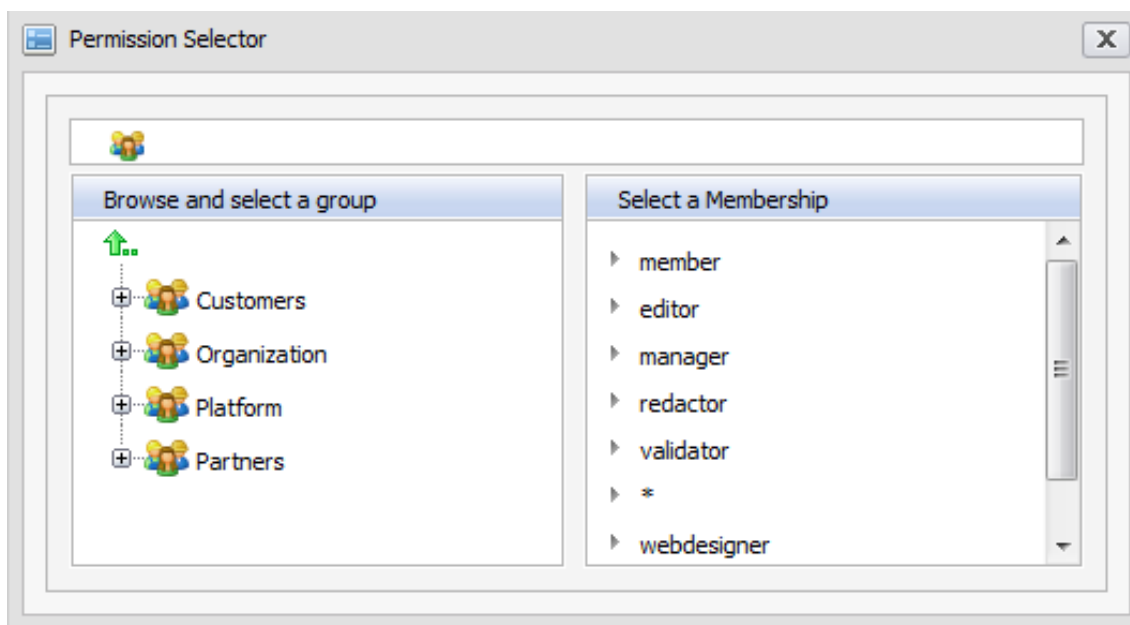
icon is to remove its corresponding group from the Access Permission list.

Edit Permission Setting

By default, it is also empty and you have to assign the edit permission to a specific group.

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

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

After selecting a group, the Current Permission will be displayed with detailed information:
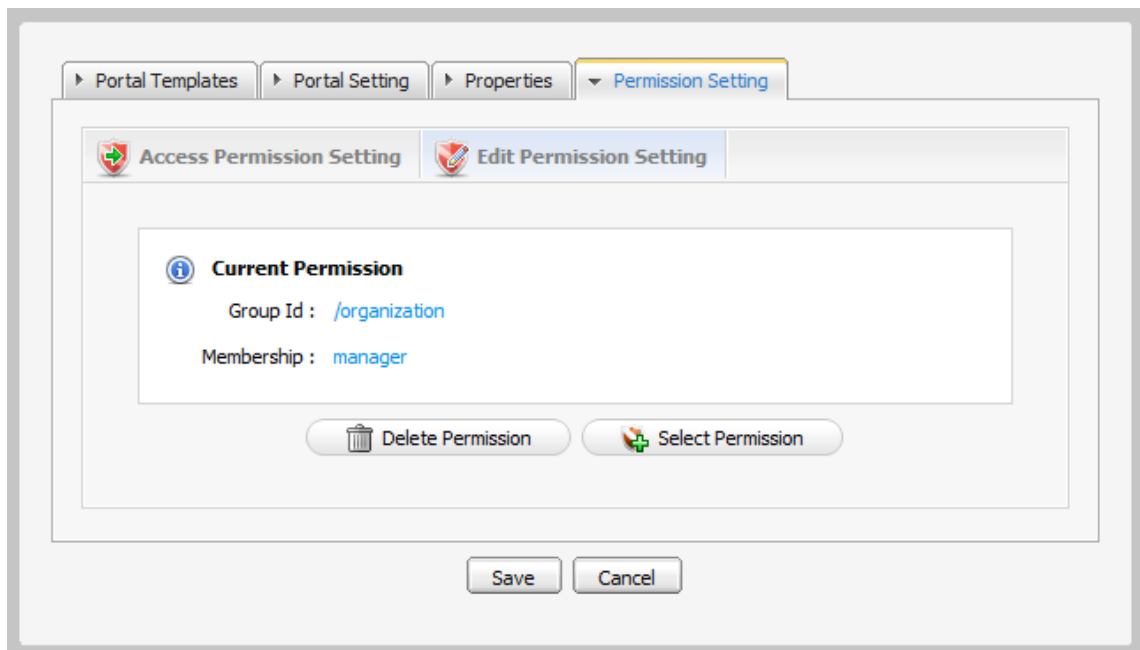
The edit permission is assigned for only one group at one time. You can click the Delete Permission button to remove the current edit permission of the selected group or re–assign the edit permission to the another group by re-clicking the Select Permission button and select another group.

7.   Click Save to accept creating a new portal.

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

To see it in the drive, click Group | Sites Explorer | Drive on the administrator bar.
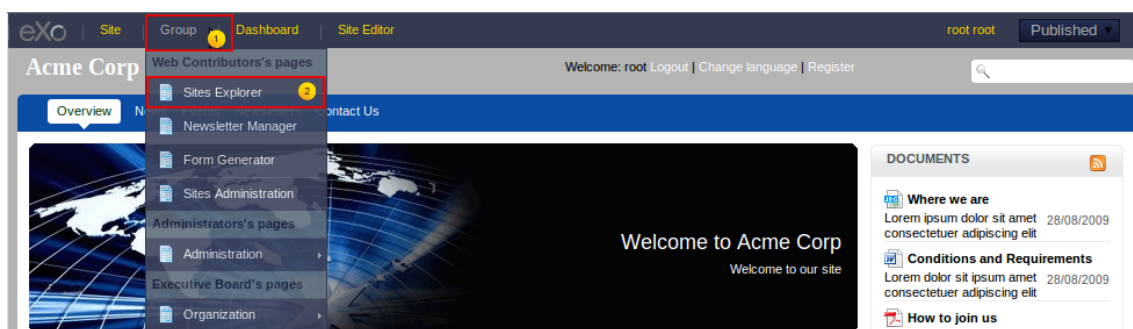
For example, after creating a portal named 'eXo', there is a drive named 'eXo' in Sites Explorer:
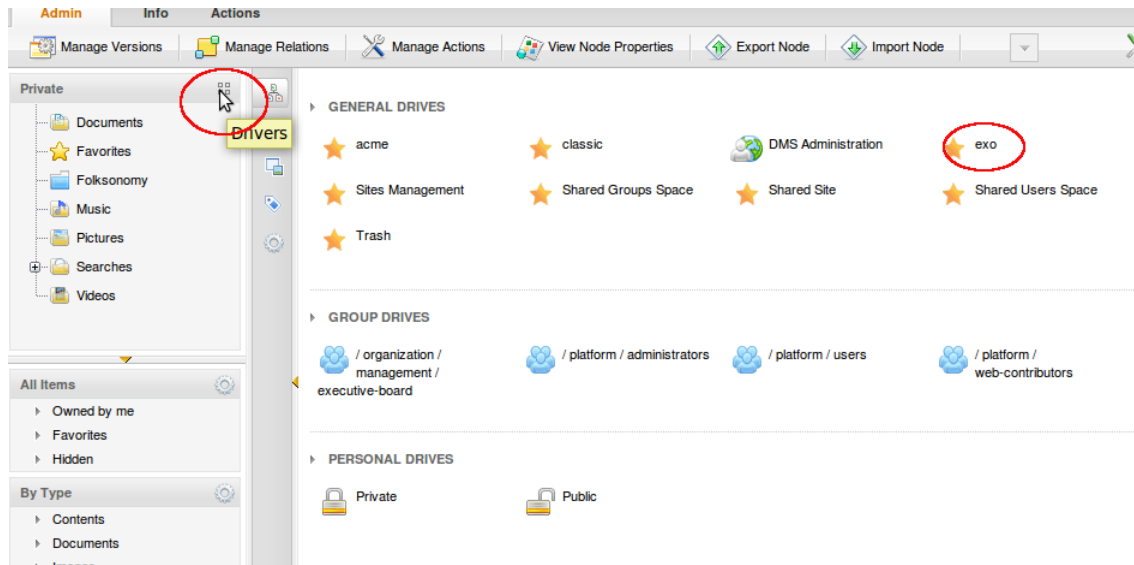
5.1.2. Edit a Site

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

You have two modes:

View Mode:

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

Edit Mode:

    in this mode, you are either view or edit layout components of the current portal.

5.1.2.1. Turn on the Edit Mode of the Site

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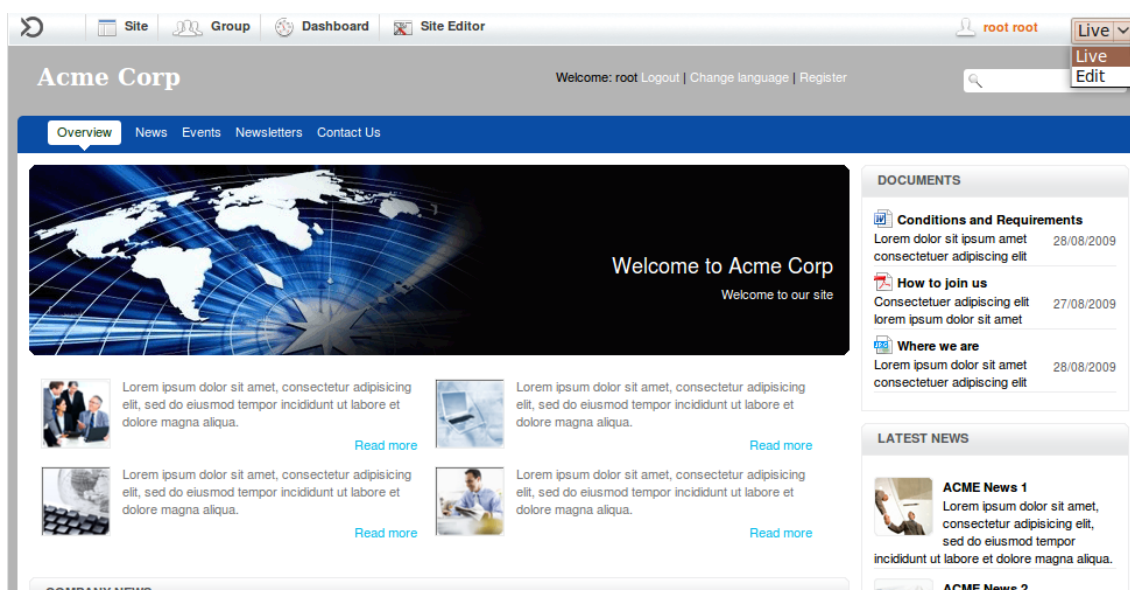
To switch between two statuses "Live" and "Edit", just click

to open the status list and select the mode you want:
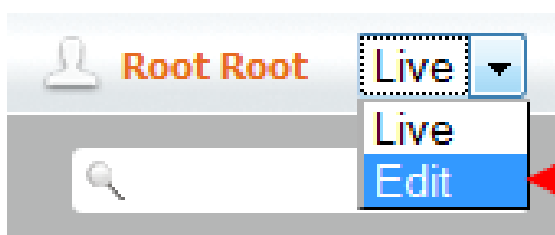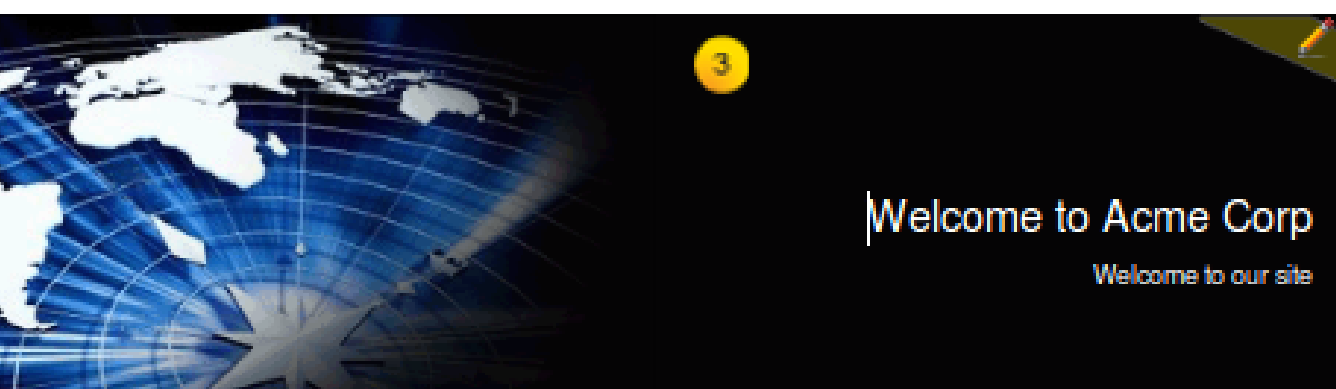
When your site is switched to the edit mode you are able to directly edit any components of your site:
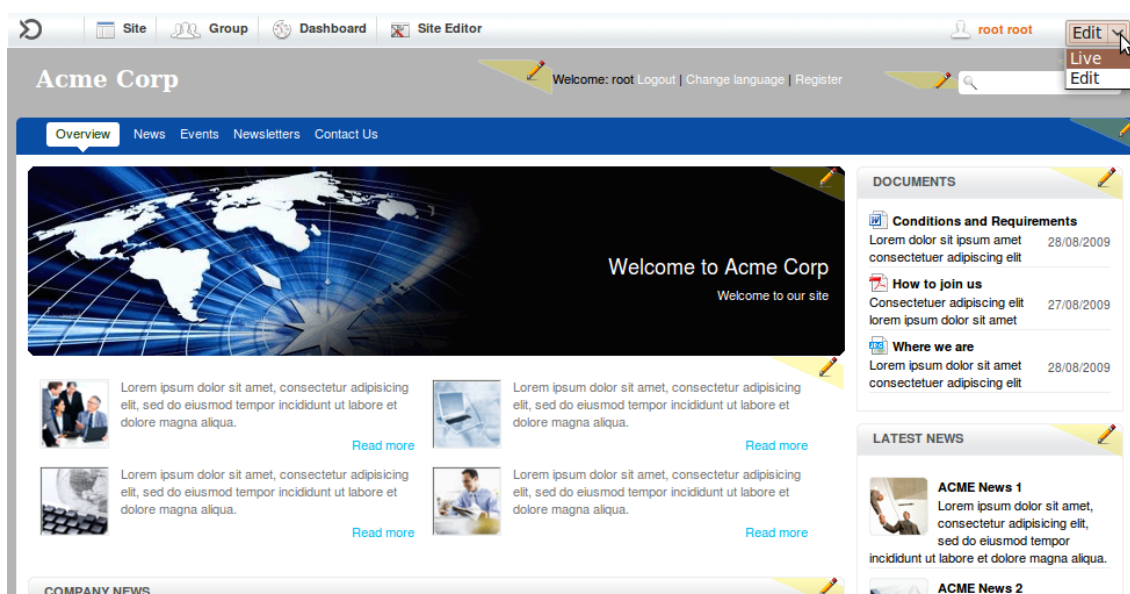
5.1.2.2. Web content structure

The interface of a site can be divided into five parts like the illustration below and each part is a single content viewer so that it also includes all default elements of a web content.
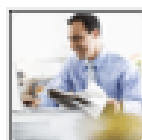
Group | Dashboard | Site Editor | **1**

2 Welcome: root Logout | Change language | Register

Events | Newsletters | Contact Us

3

Welcome to Acme Corp

Welcome to our site

DOCUMENTS

Conditions a
Lorem dolor sit ip
consectetuer adip

How to join u
Consectetuer adi
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Where we ar
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LATEST NEWS

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Read more

① This is Administration bar which contains some administration functions related to portals (websites).

② This is Banner which contains organization's slogan, logo, icon used in websites.

③ This is Navigation bar that helps the website' s users to visualize the structure of website and provide quick links to different pages.

④ This is the page content area to display the content of current selecting page

⑤ This is Footer of the web site. It can be texts, or image that is displayed at the bottom of the web site. It provides information about author/institutional sponsor, revision date, copyright, etc.

5.1.2.3. How to edit a Site
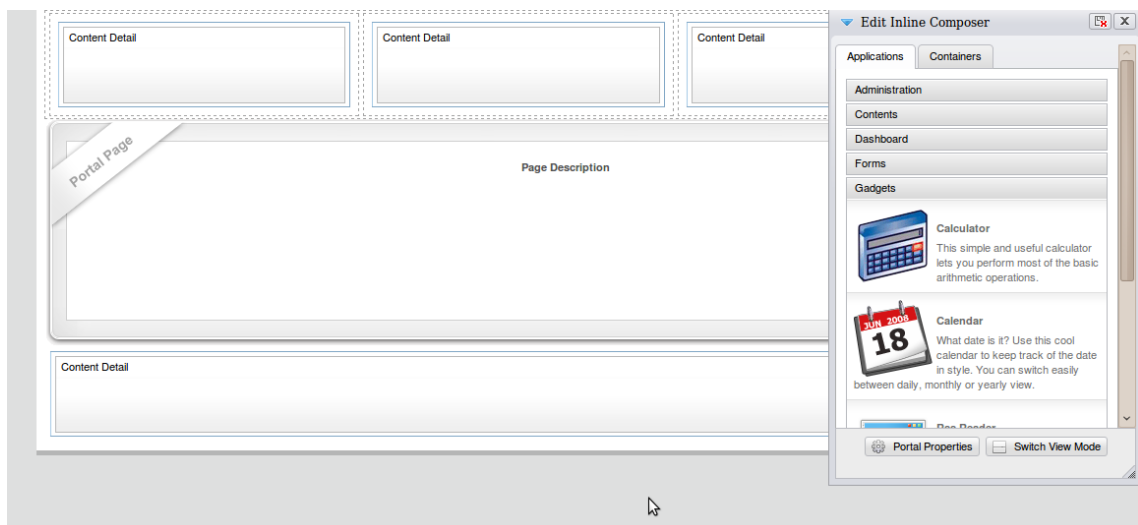
To edit a site, do the following steps:

Procedure 5.2. Edit the properties of the Website:

1. Show the form to edit the current site by clicking Site Editor on the administration bar, then select

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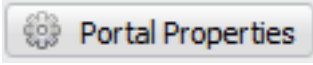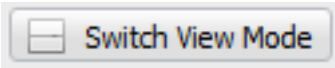
2. The form to edit the current portal will appear.

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

Table 5.2.

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

The layout of Edit Website: You can only edit a banner, a navigation bar, a breadcrumb bar, a homepage and a footer of a website.

Procedure 5.3. Edit Banner

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

   Show the form to edit a banner by:

   • Switch on the Edit Status on the homepage and click the edit button on the homepage as this illustration below:
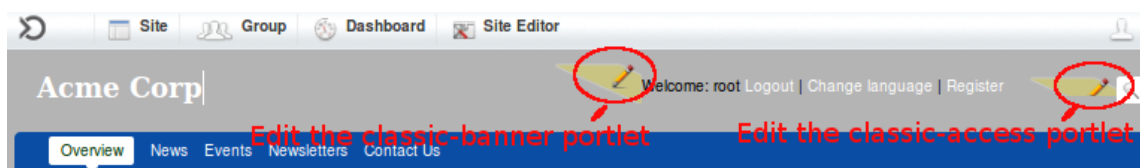
   or

   • Click   the

   icon at the right corner of the classic - banner portlet (for the left banner) or classic- access portlet (for the right banner) in the Edit Portal form.

A form to edit the current banner will appear:
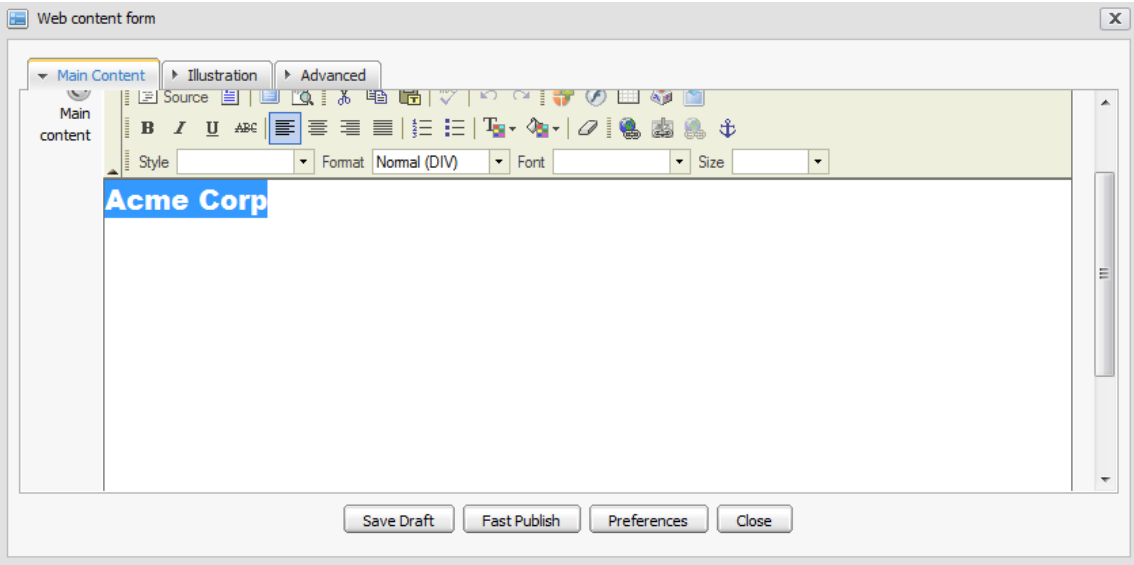
Edit Left Banner
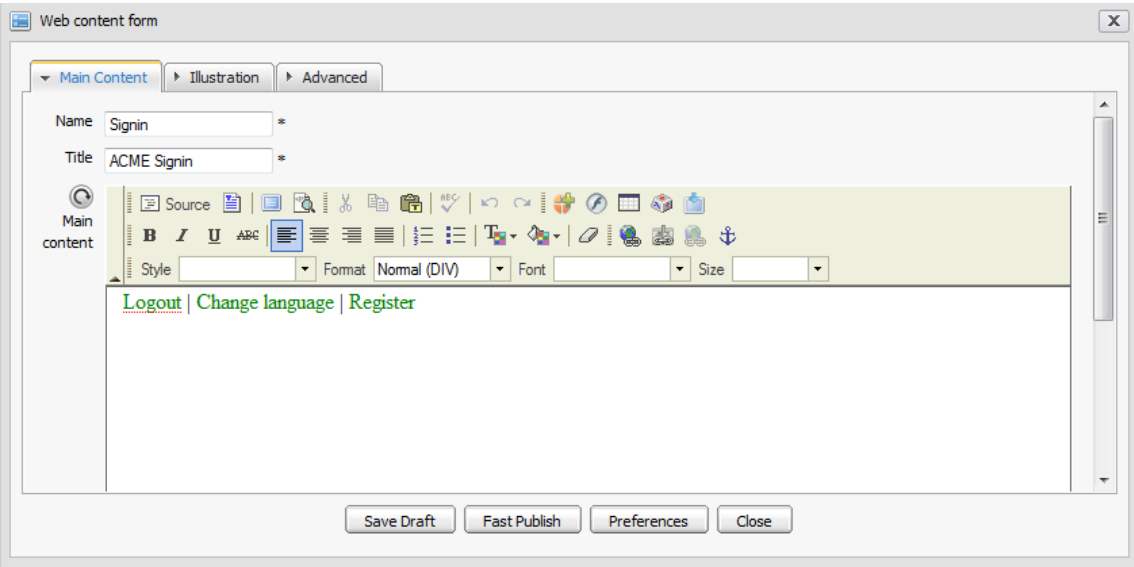
Edit Right Banner

Table 5.3.

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

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

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

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

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

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

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

1. Edit the current permission of a group/user in the **Permission** table by clicking the

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

2. Or you can add new groups into the Permission table:

   Select   the

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

   icon.

   Select   the

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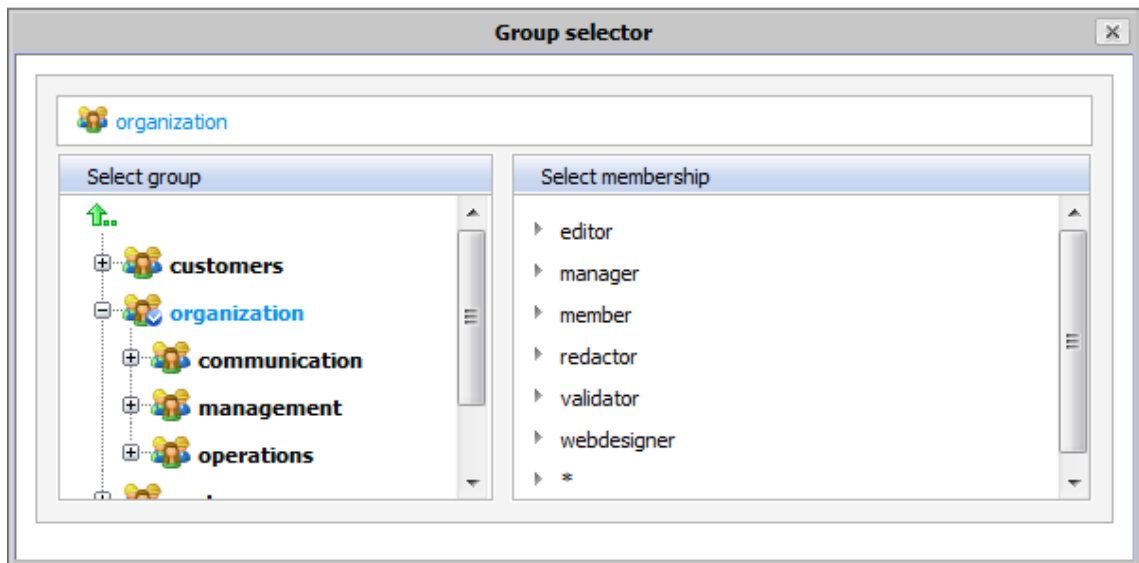
Select the

icon if you want to set permission for all users.

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

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

- The **Configuration for Single content viewer** tab includes:
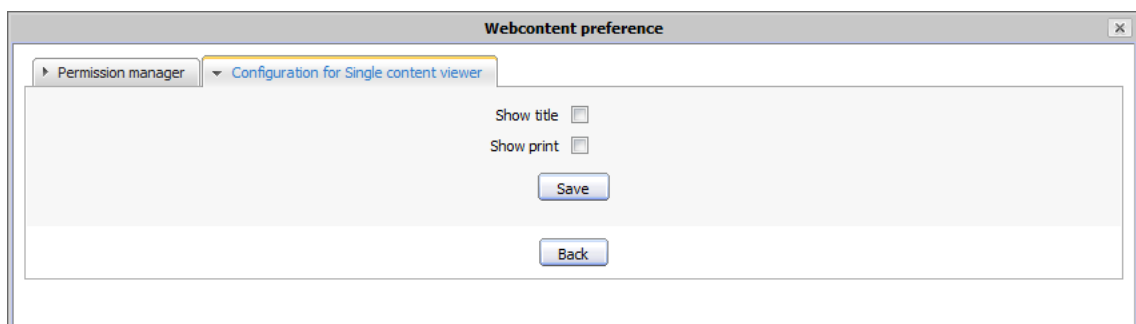
Table 5.4.

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

- The **Illustration** tab in the Web Content form:
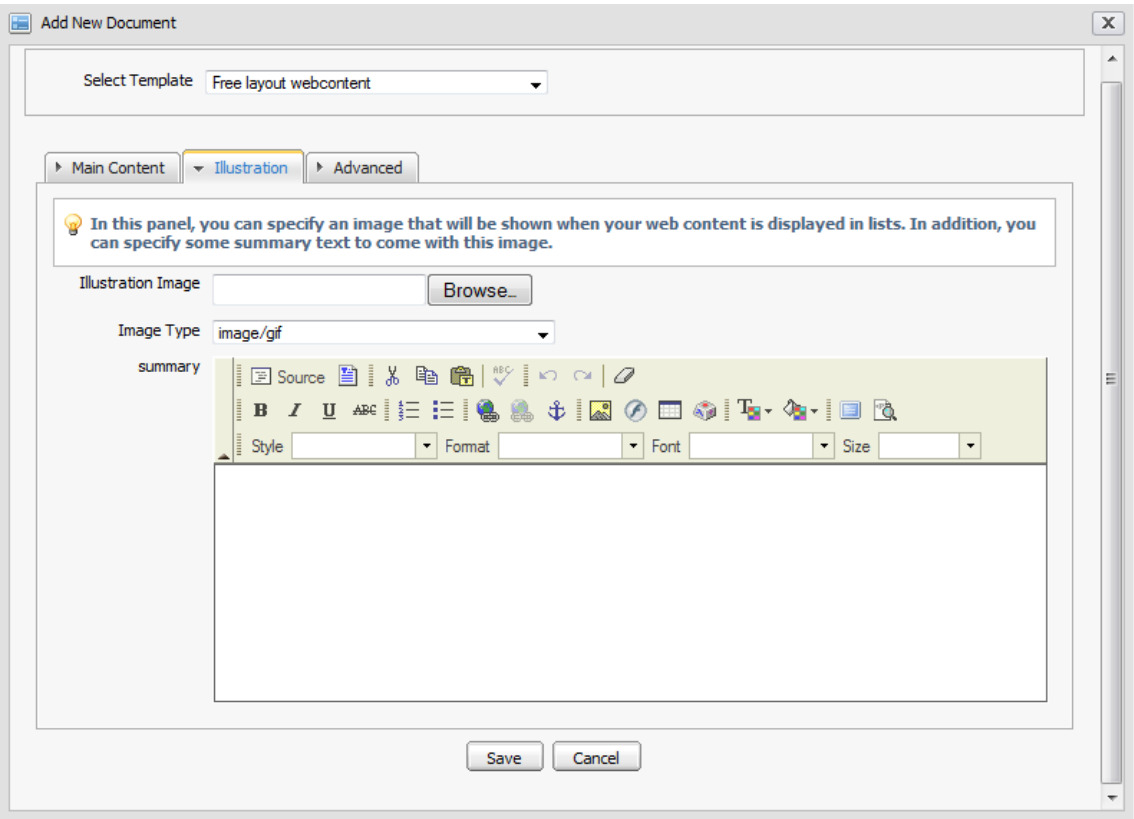
Table 5.5.

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

To upload an image to the site:

- Browse an image list on your local computer by clicking the Browse... button and then select a specific location.

- Select an image in the list to upload.

- The Advanced tab:

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

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

JS data:
It contains JS content to make the web content dynamically when being published. You can optionally enter JS content in this field.
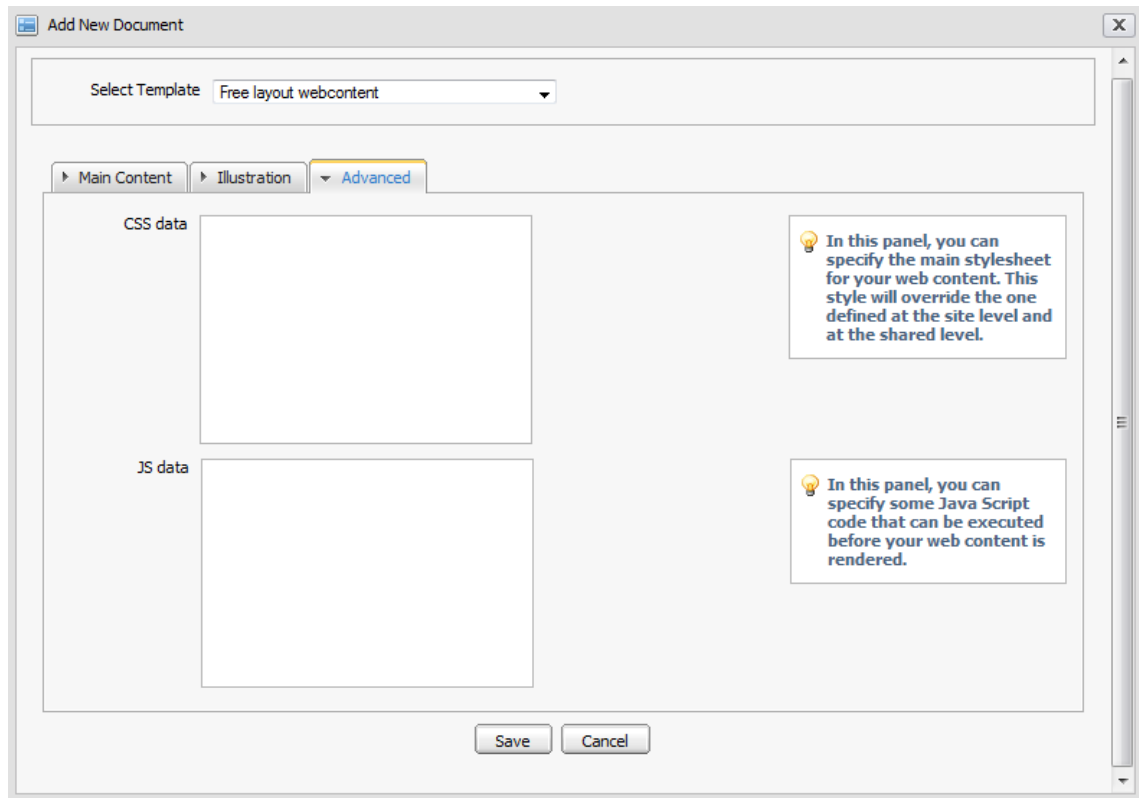
Procedure 5.4. Edit Homepage
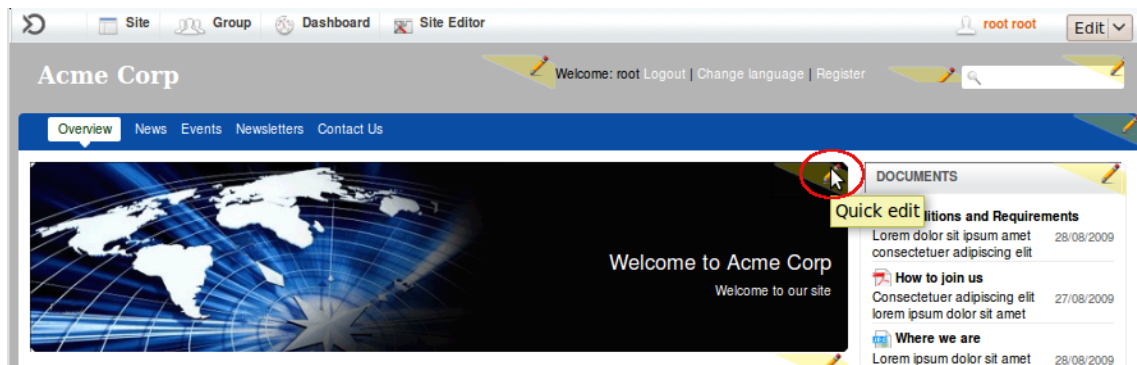
1. WCM helps you edit the main content displayed in the home page of a web site.

   Do the following steps:
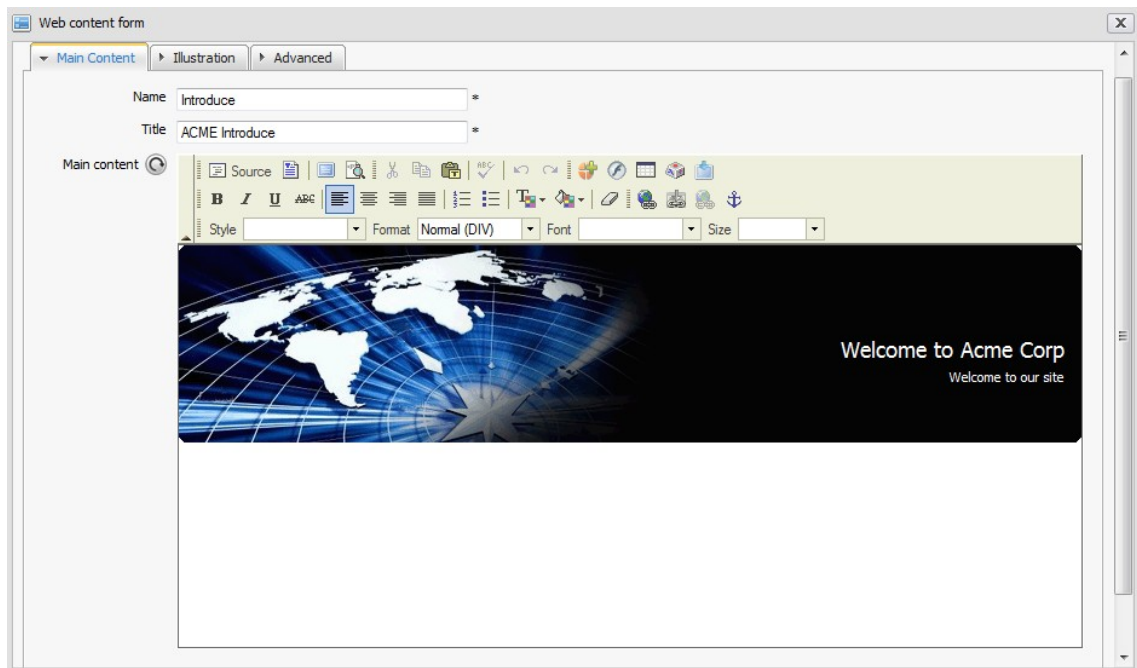
2. Show a form to edit the home page by clicking the

   icon at the right corner of the home page:

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

3. Change values in this form.

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

5. To set more properties for this content, click the **Preference** button.

Procedure 5.5. Edit Footer

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

    Do the following steps:

2. Show the form to edit the footer of the current site in two following ways:

- Click the

  icon at the right corner of the footer portlet. The form to edit the current footer will appear.
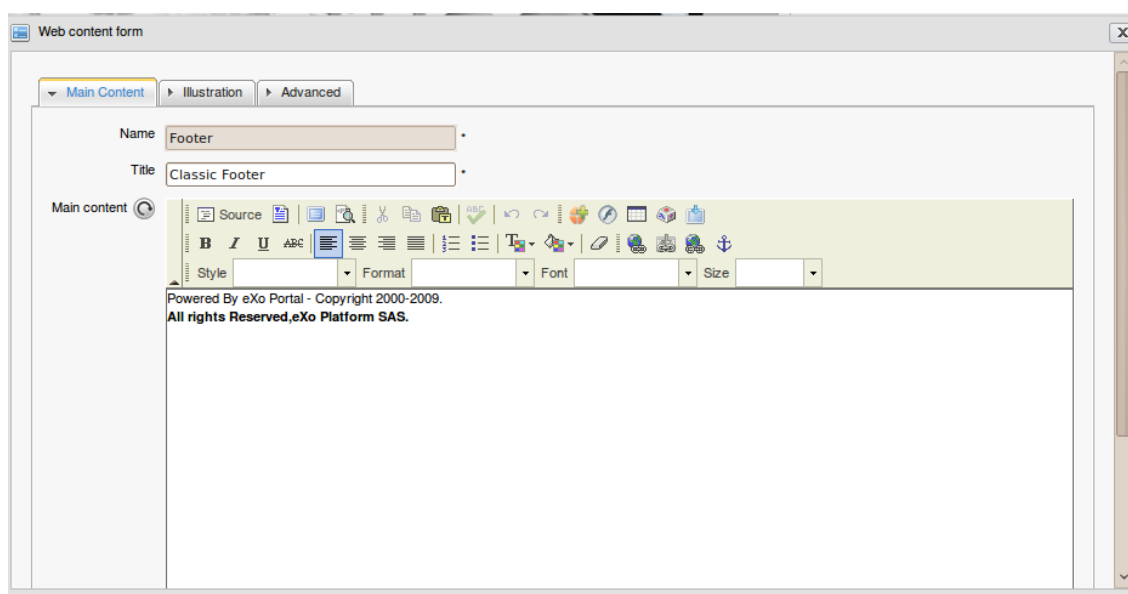
- Click the

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

The form to edit the current footer will appear:

3. Change values of this form.

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

5. To set more properties for this content, click the **Preference** button.

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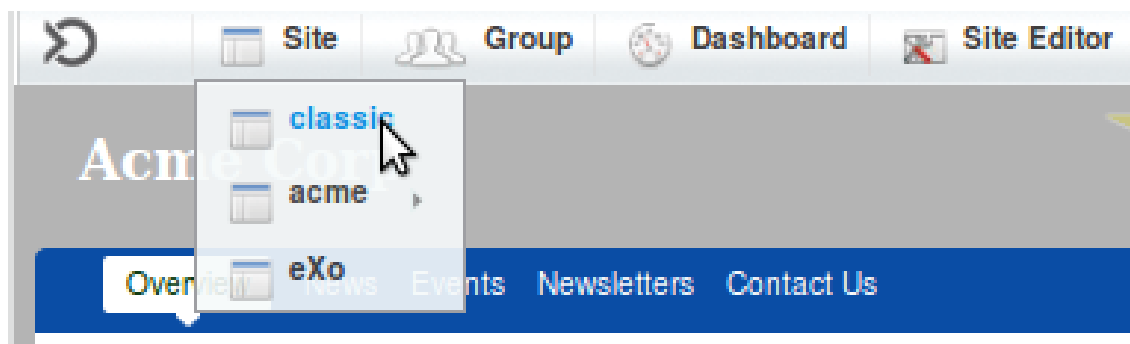
The Banner, Home page and Footer of a site are shared to others. Thus, all their changes will impact on the entire site. So you should copy the shared banner, home page and footer to a specific portal folder and refer to them when you need

5.1.3. Switch between sites

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

Procedure 5.6.

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

Your current site will be switched to the selected site.

5.1.4. Delete a site

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

Do the following steps:

Procedure 5.7.

1. Show the portal list by clicking Site on the Administration bar:
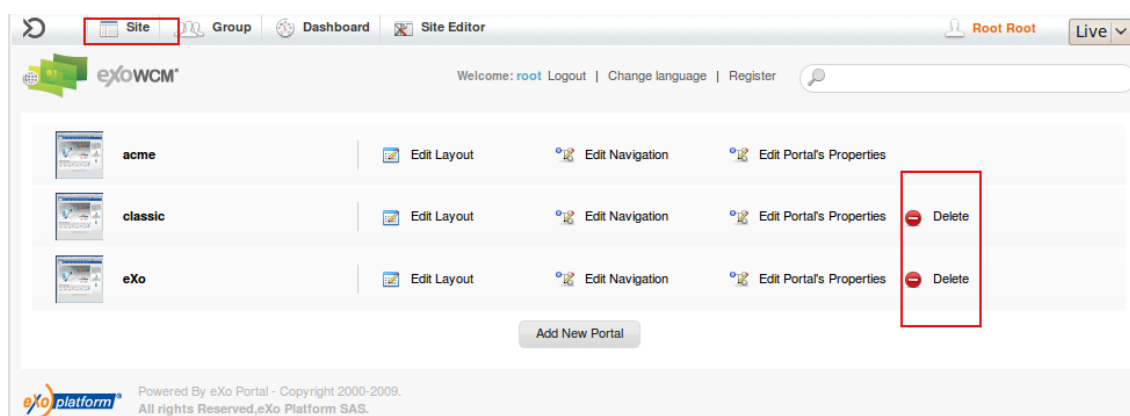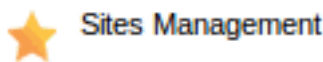
2. Click

in the row of the portal that you want to delete.

3. Click OK in the confirmation message to accept deleting.

5.2. Manage Site Resources in one place

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

Chose

 Sites Management

in General drive. All of your created sites and their resources will be listed in the left panel.
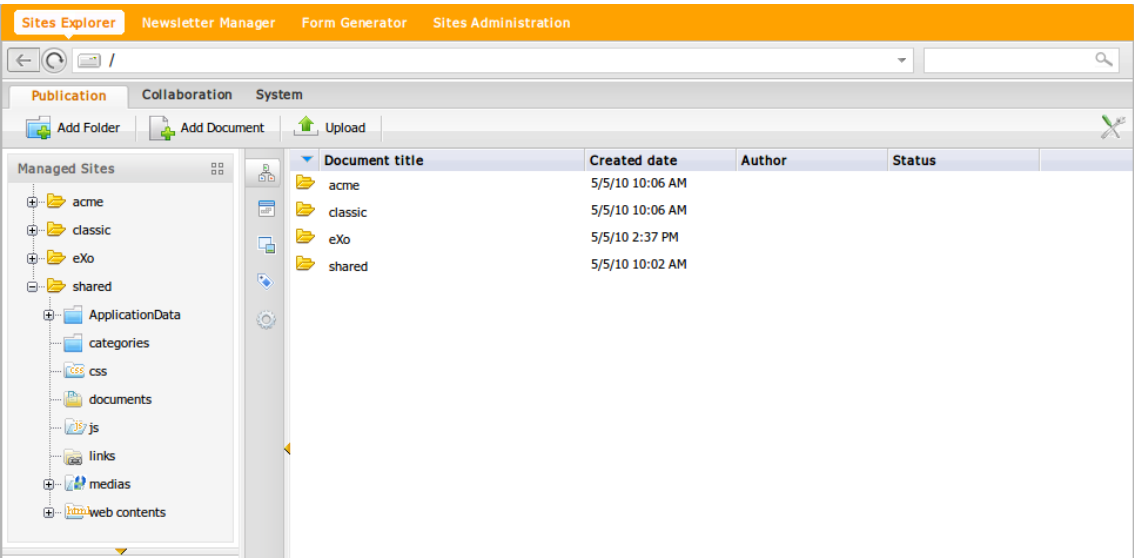
All sites contain typical folders that are site resources:

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

5.2.1. CSS Folder

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

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

5.2.2. Document Folder

This folder contains all documents used in a site. When you want to add a new document for a site, you also can put them outside this folder but you are recommended to put all documents in this folder to manage all site's documents easily and conveniently.
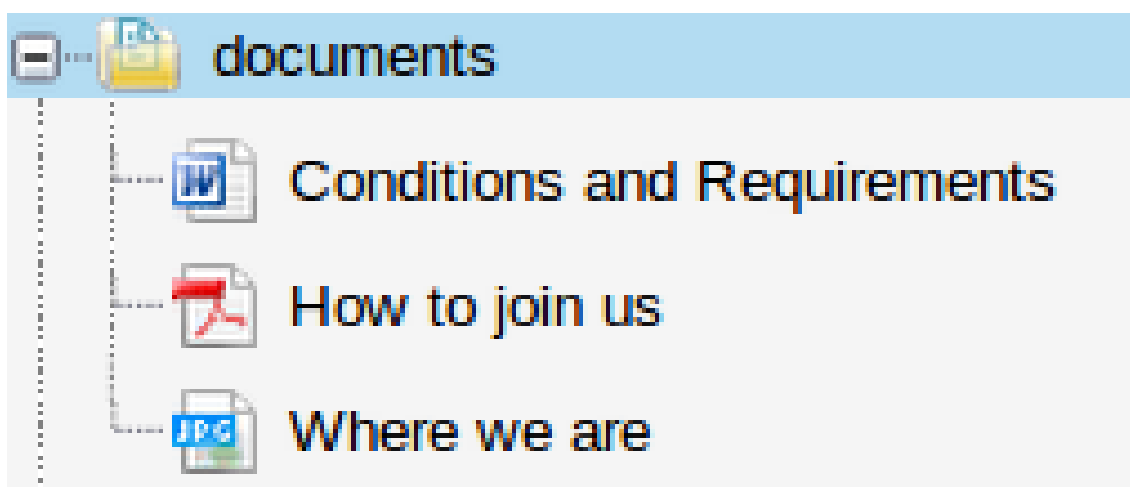
5.2.3. JS Folder
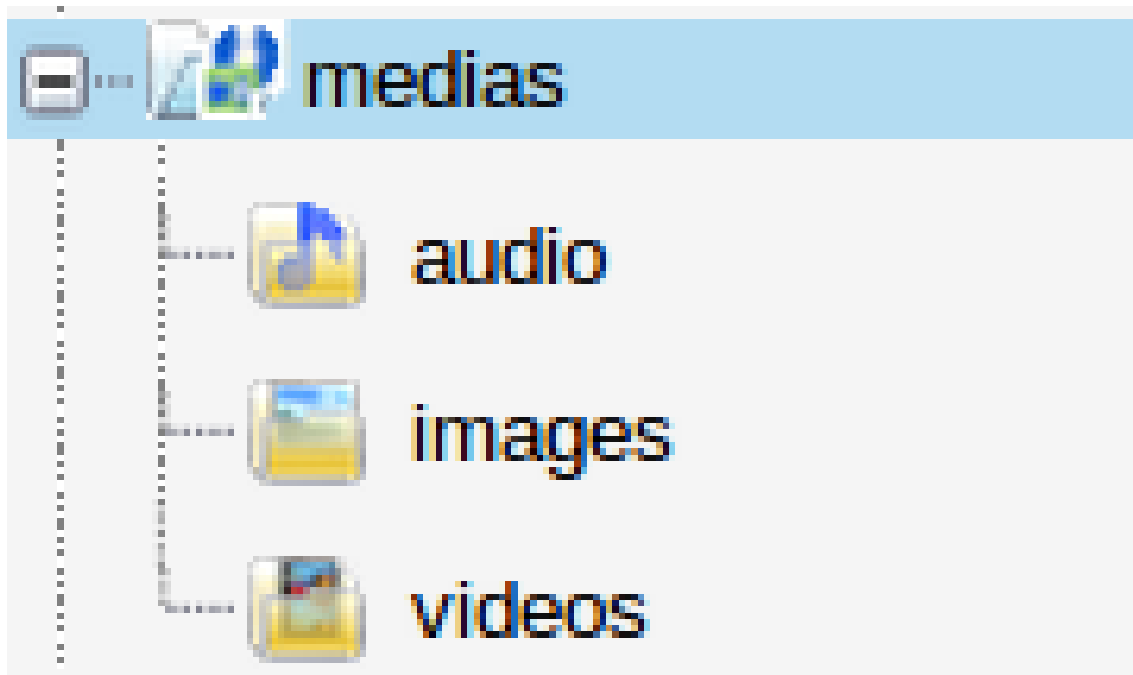
This is one of default files of a site. This file contains Java Script data that is used to make a site more animated and more dynamic.

5.2.4. Links Folder

This file contains all links used in a site.

5.2.5. Media Folder

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

audio:

This folder contains sound data used in a site.

images:
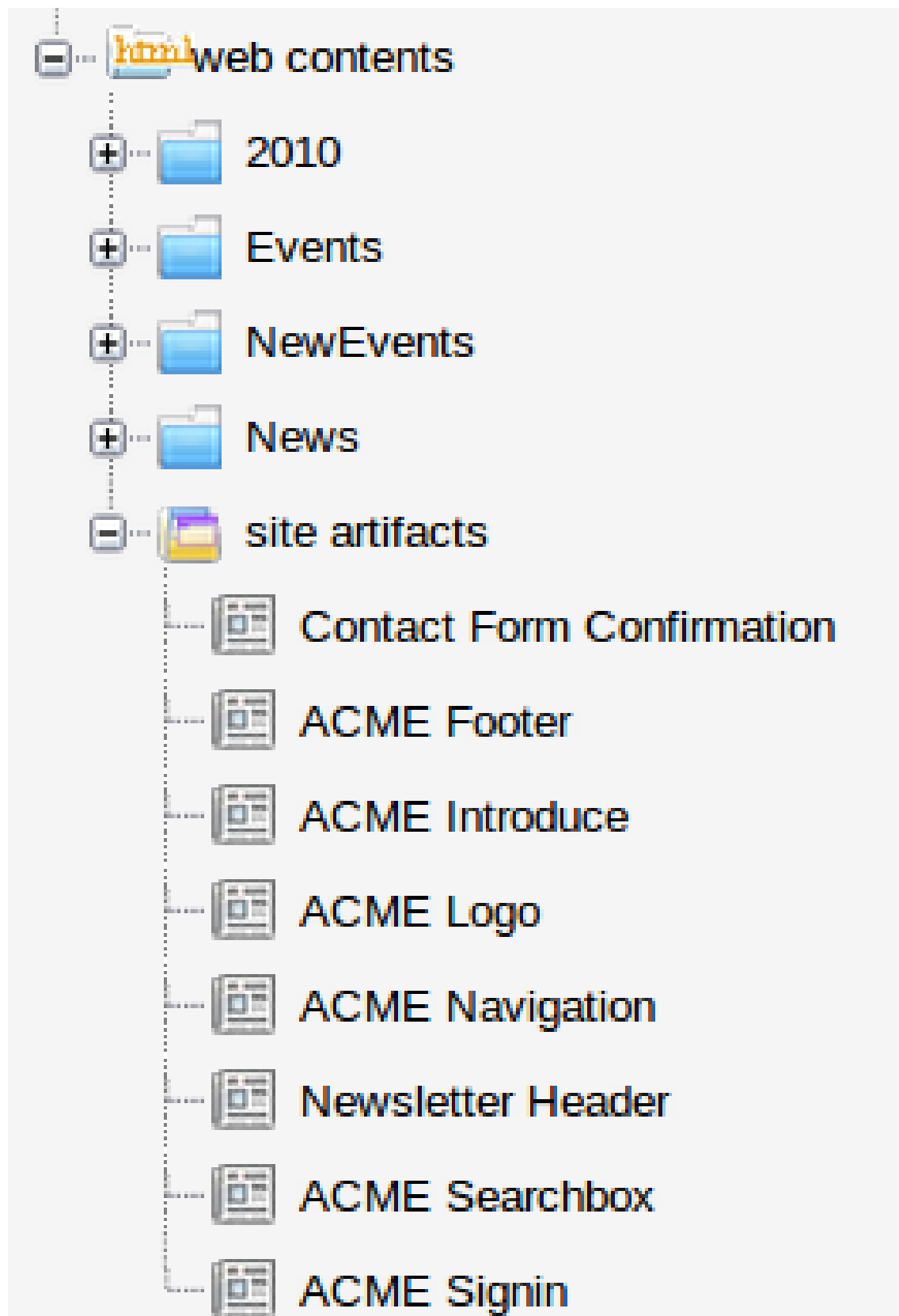
This folder contains images used in a site.

videos:

This folder contains videos used in a site.

5.2.6. Web Content Folder

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

- html web contents
  - + 2010
  - + Events
  - + NewEvents
  - + News
  - site artifacts
    - Contact Form Confirmation
    - ACME Footer
    - ACME Introduce
    - ACME Logo
    - ACME Navigation
    - Newsletter Header
    - ACME Searchbox
    - ACME Signin

5.3. Sites Administration

This page is used to manage all workspaces, drives, node types, metadata, templates, queries, etc. Only administrator like "root" can access the WCM Administration.

Procedure 5.8.

• Click **Sites Administration** on the Group bar:
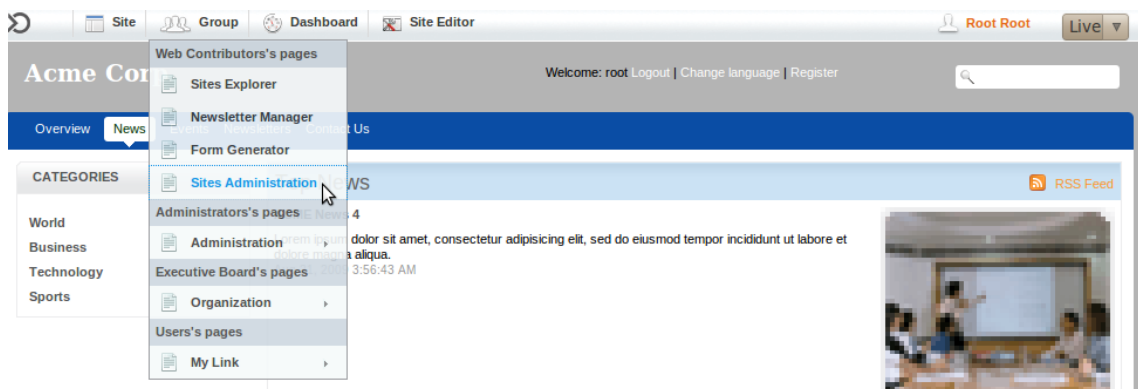
The **Sites Administration** page will appear:
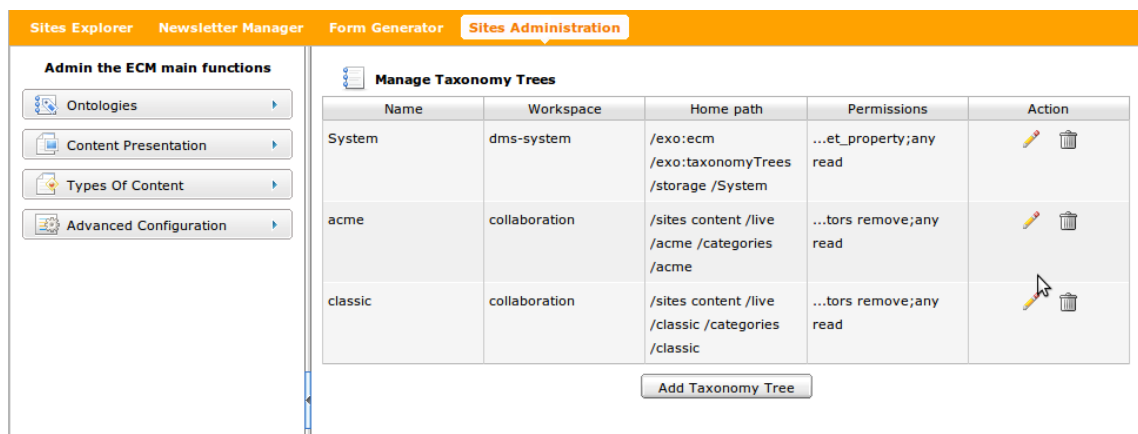
This page offers access to:
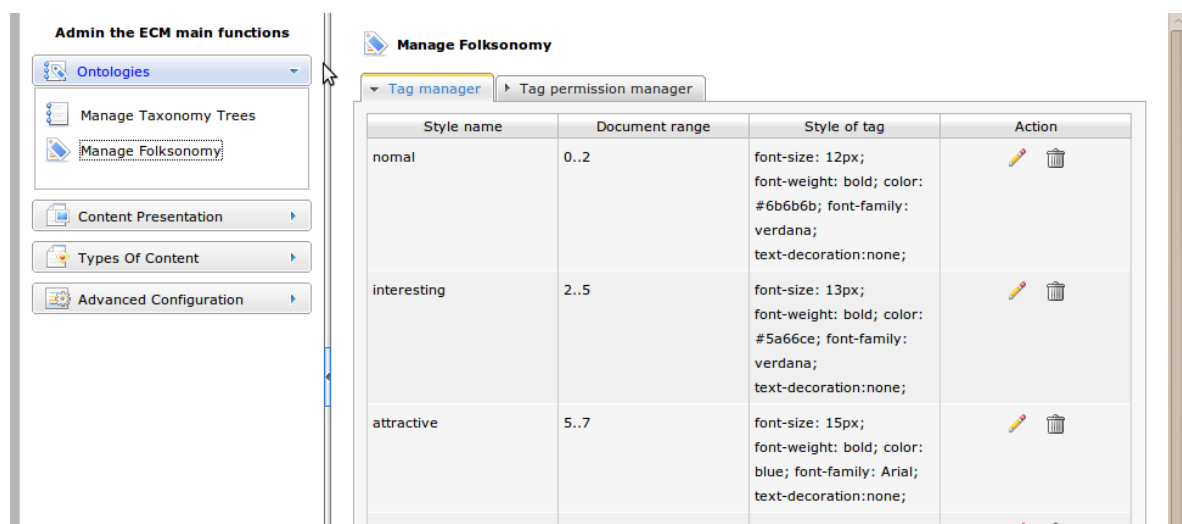
• **Ontologies**: includes Manage Folksonomy and Manage Taxonomies.

• **Content Presentation**: includes Manage Template, Manage Metadata, Manage Views, Manage Drive.

• **Types of Content**: includes Namespace Registry, Manage Node Type.

• **Advanced Configuration**: includes Manage Queries, Manage Scripts, Create an Action Type.

5.3.1. Ontology

5.3.1.1. Folksonomy Management

The Folksonomy allows you to manage tag styles. The tag style will be changed depending on the number of documents in a tag.

Go to **Sites Administration**, then **Ontologies**, and finally, **Manage Folksonomy**.

5.3.1.1.1. Edit
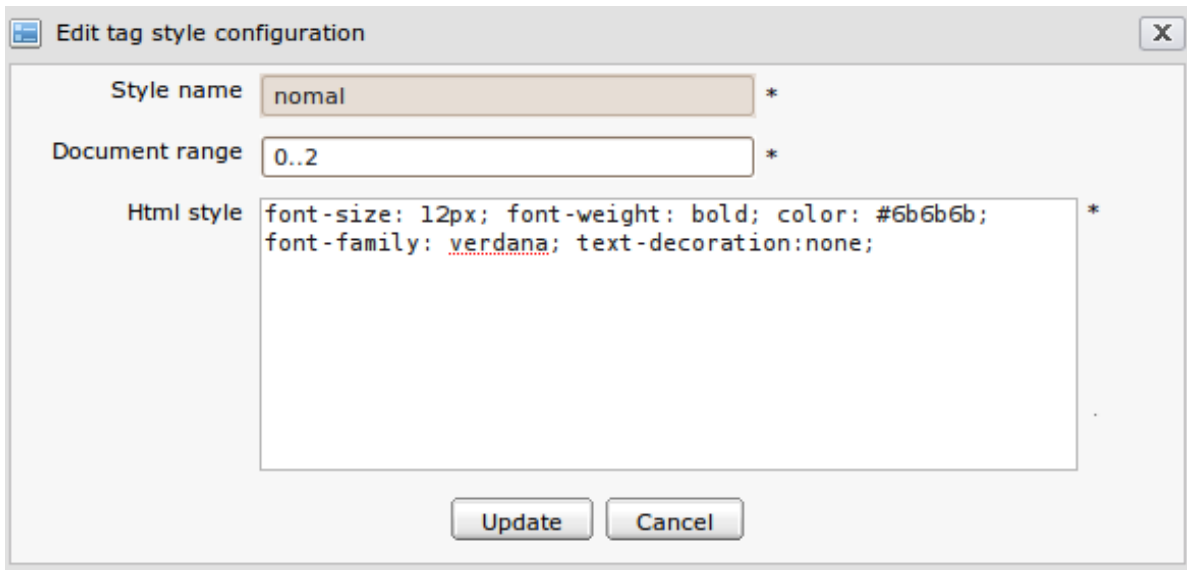
`Tag manager` tab:

To edit existing tags, do as follows:

Procedure 5.9. Editing existing tabs

1. **Step One**

   Click the icon that corresponds to the tag name which you want to edit in the `Action` column to edit the tag style configuration. The **Edit tag style configuration** form will appear:

Details:

Style name
 To give the tag name. (*Required).

Document Range
 To give the number of document assigned to the same tag. (*Required).

Html style
 To include font-size, font-weight, colour, font-family, text-decoration. (*Required).

2. **Step Two**

 Change values for fields: **Style name**, **Document range**. **Html single**

3. **Step Three**

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

> **i** **Note**
>
> - You cannot edit the style name.
>
> - The format of valid range must be: a..b with 'a', 'b' are positive integers. You can use * instead of 'b' to indicate it is unlimited.
>
> - The 'Html style' text box cannot be empty: you can change values of font-size, font–weight, color, font-family, text-decoration.

5.3.1.1.2. Delete a tag style

An administrator can delete a tag style by clicking the trash icon that corresponds to the tag style which an administrator wants to delete. There will be a message which confirms the deletion:
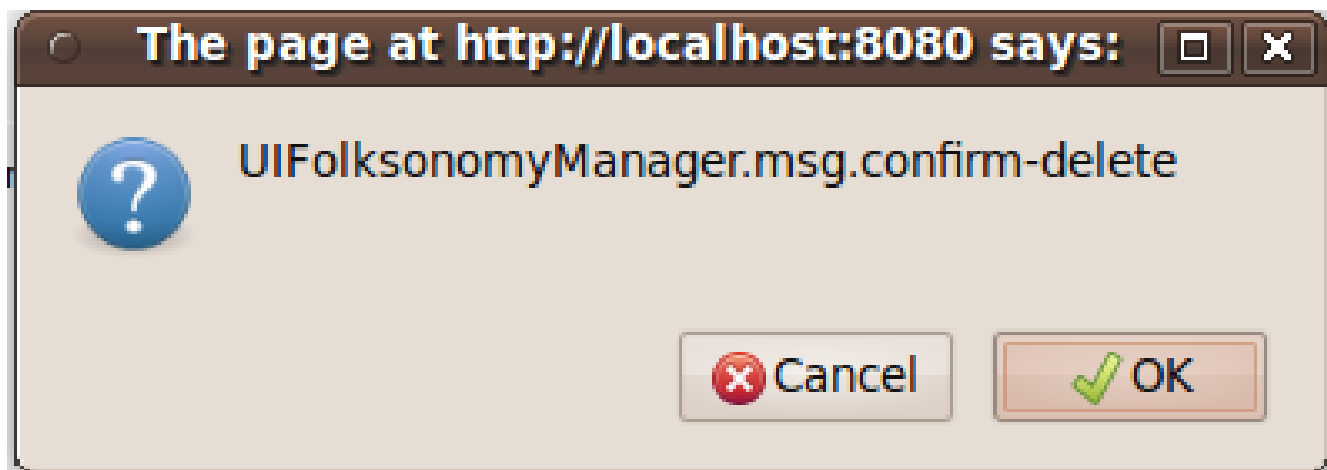
Click **OK** to accept deletion, or **Cancel** to quit without deleting the tag style

5.3.1.1.3. Add a tag style

Furthermore, an administrator can add a new tag style as follows:

Procedure 5.10. Add a Tag Style

1. **Step One**

   Click the **Add style** button. The **Add tag style configuration** form will appear:

2. **Step Two**

    Input values for fields: **Style name**, **Document range**, **Html style**, all of which are required.

3. **Step Three**

    Click **Update** to accept adding a new tag style, or **Cancel** to quit without adding a new tag style.

    Tag Permission Manager. The **Tag permission manager** tab helps administrator set permissions regarding editing and deleting public tags.

4. **Step Four**

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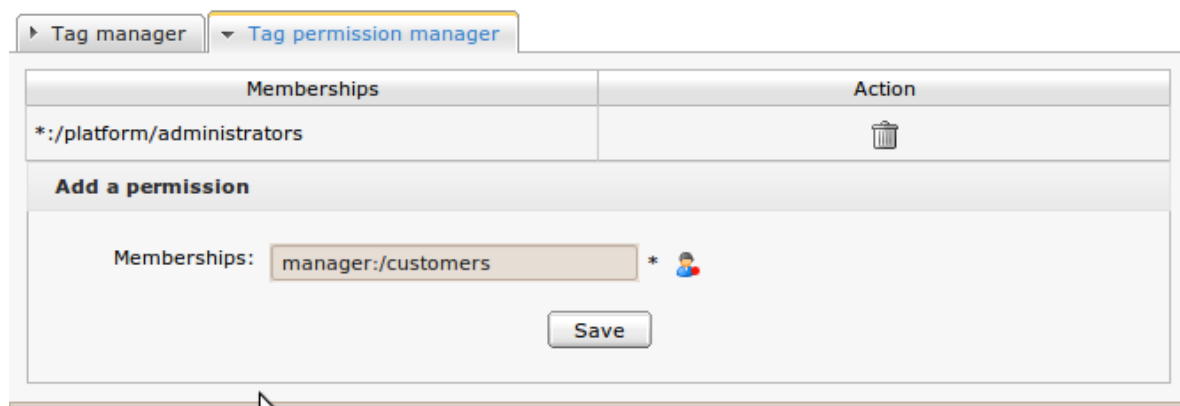
5. **Step Five**

   Select a group on the left and the corresponding membership on the right. The selected membership will appear in the **Memberships**field:
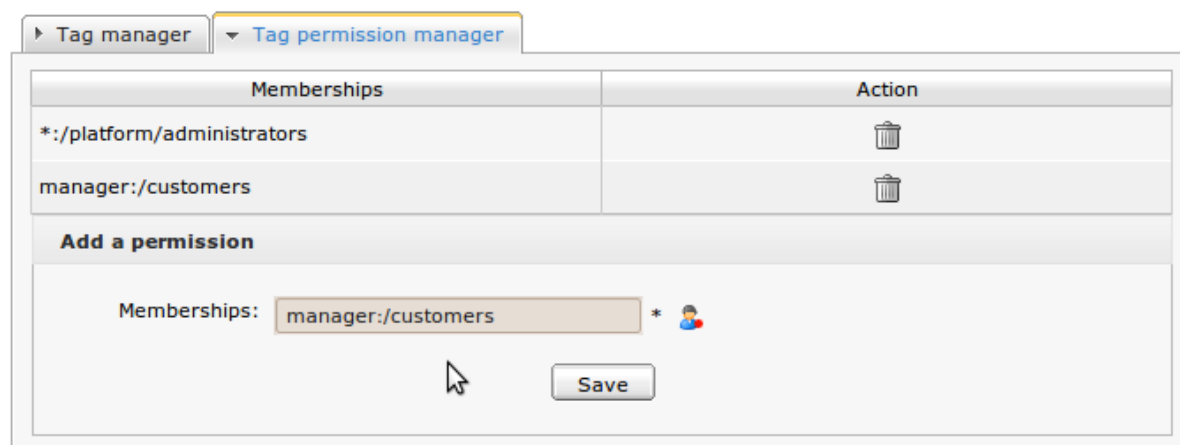
6. **Step Six**

   Click **Save** to accept adding a permission for the selected membership of the selected group. The selected membership that has just been added a permission will be listed in the **Memberships** column.
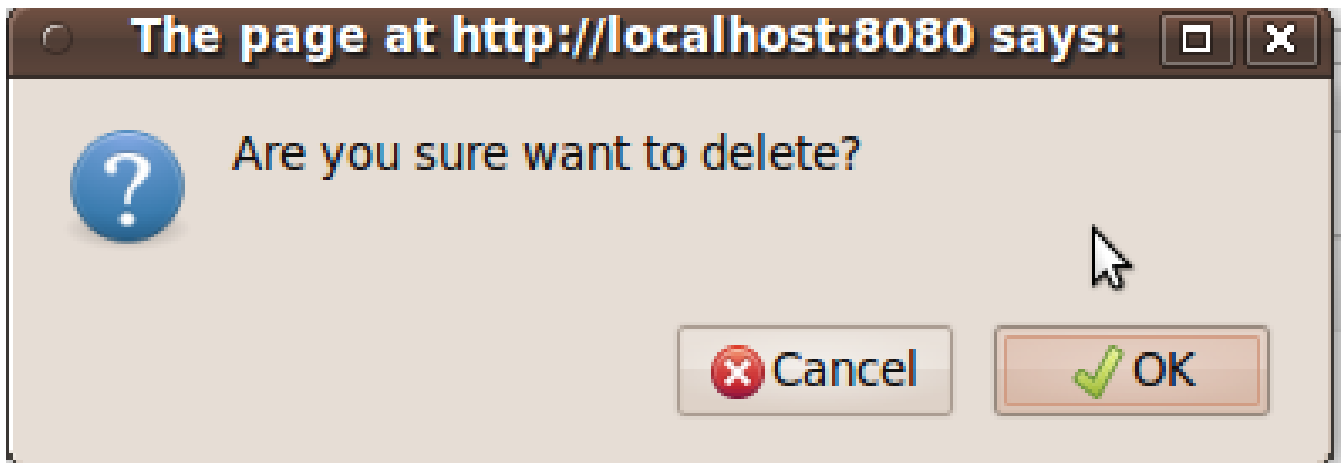
   An administrator can also delete memberships that have been set permissions by clicking the Delete icon relevant to that membership. A confirmation message will appear:
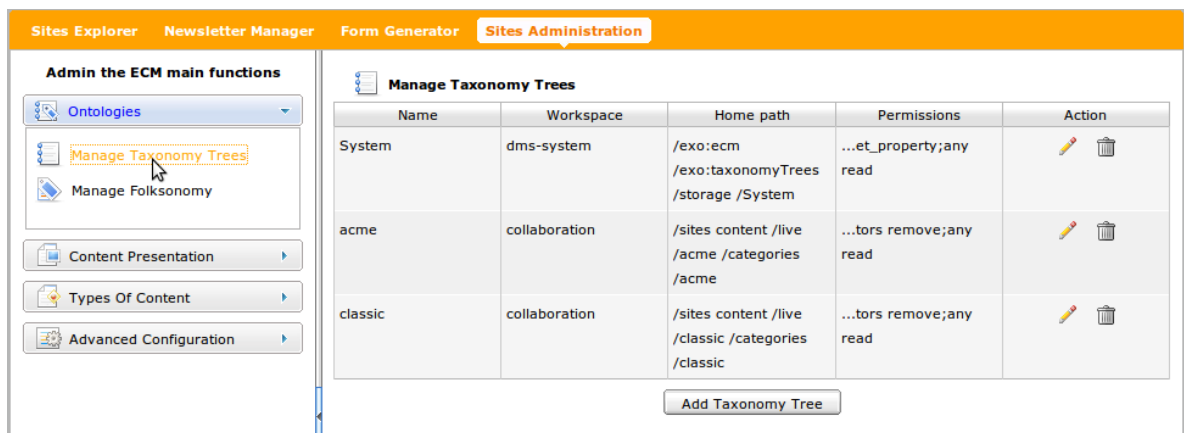
7. **Step Seven**

   Click **OK** to accept the deletion, or **Cancel** to quit the form without deleting.

5.3.1.2. Manage Taxonomy Trees

A Taxonomy may be understood as a classification practice and science. It is used to sort documents, aiming at facilitating searches. The Taxonomy management includes adding, editing and deleting a taxonomy tree. Go to **Sites Administration**, then **Ontologies Manage Taxonomy Trees**.
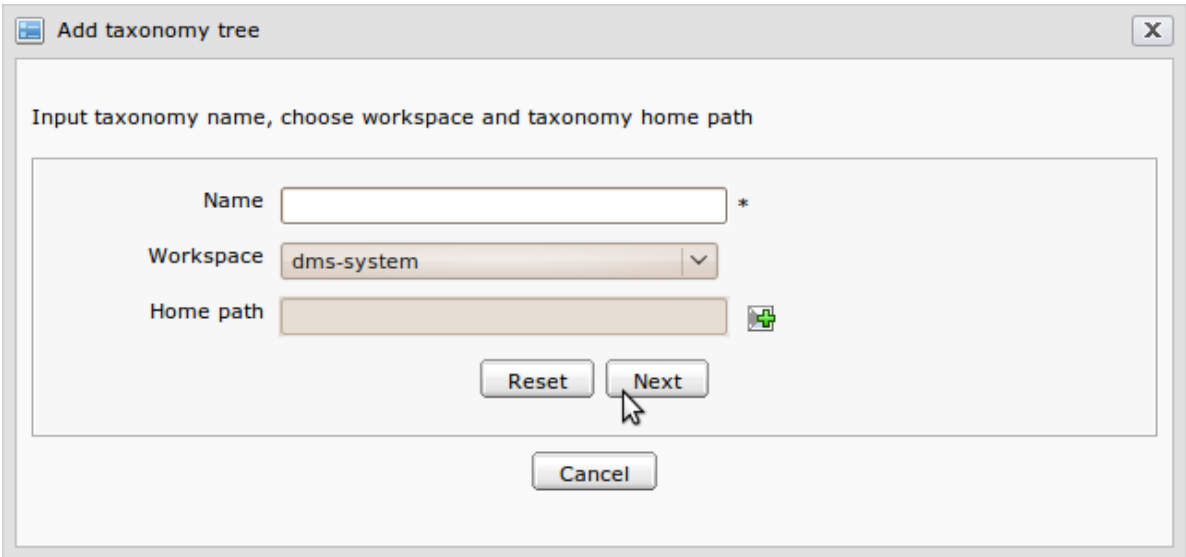
5.3.1.3. Add a Taxonomy Tree

Perform the step in *Adding a Taxonomy Tree* to add a taxonomy tree.

Procedure 5.11. Adding a Taxonomy Tree

1. **Step One**

   Click the **Add Taxonomy Tree** button to add a new taxonomy. The **Add taxonomy tree** form will appear.

2. **Step Two**
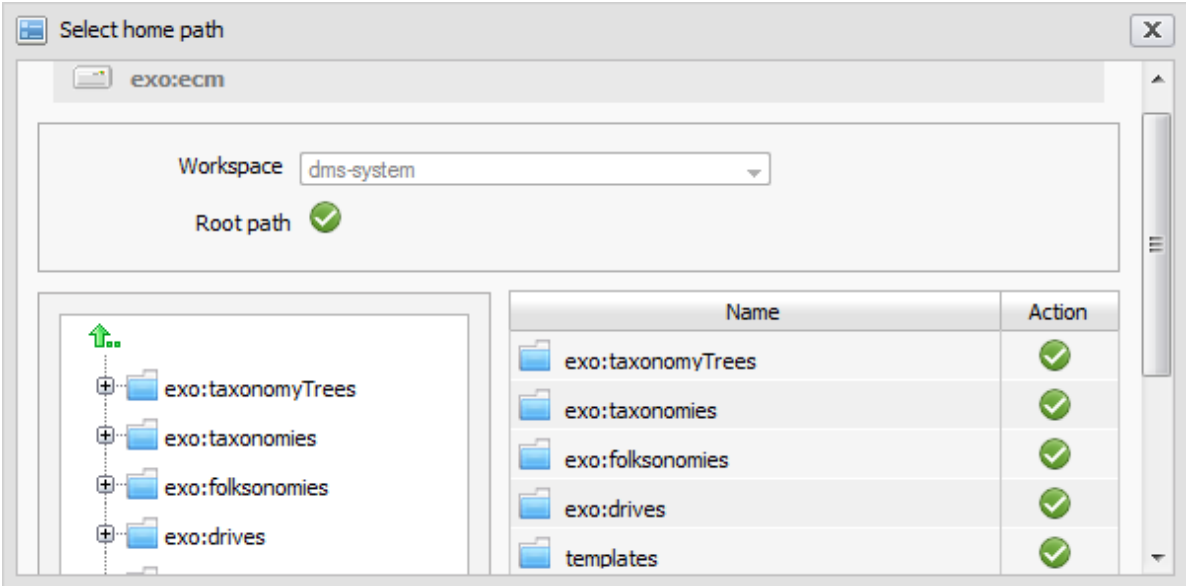
   Enter the taxonomy tree name in the **Name** field. (*Required).

3. **Step Three**

   Select the workspace you want to work with.

4. **Step Four**

   Select the home path by clicking the plus item. The **Select Home Path** form will appear:

5. **Step Five**

   Click the tick icon if you want to select the root path or click the arrow icon to go to the up level path. Click the plus sign to expand the folder.

6. **Step Six**

Click the tick icon corresponding to the path that you want to select as a home path.

Click **Reset** if you want to reset values that have just been selected or **Next** to select permissions for a taxonomy tree.
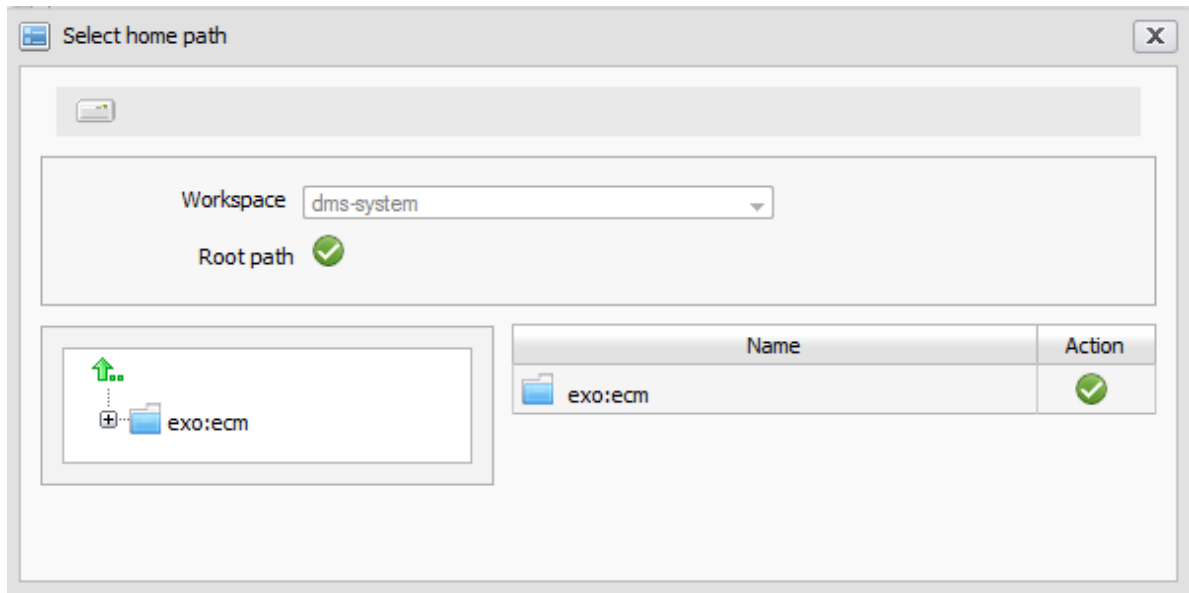
7. **Step Seven**

Click   the

icon   to   select   a   user   or   the

icon   to   select   memerships   or   the

icon to select everyone in order to set permissions. The user or memership that you have just selected will be displayed in the **User or Group** field.

Then, check at least one of these below options to set rights for the selected user to membership:

Read Right
   The option is to select the read right or not.

Add Note Right
   The option is to select the Add Node right or not.

Set Property Right
   The option is to select the Set Property Right or not.

Remove Right

> The option is to select the Remove right or not.

8. **Step Eight**

Click **Save** to save all values, or **Reset** to change values that have just been set. After clicking **Save**, click **Next** to go to the next step.

9. **Step Nine**

Enter the name for an action of the taxonomy tree in the Name field. (*Required).

10. **Step Ten**

Select values for **Lifecycle**, **NodeTypes**, **Target workspace**, **Target path**, **Affected Node Types**. (*Required).

11. **Step Eleven**

Click **Save** to save all values and, click **Next** to go to the next step.

> **Note**
>
> - Do not input some special characters in the 'Name' field like: !,@,#,$,%,&,*,(,).

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

- The taxonomy name must contain less than 30 characters.

5.3.1.4. Edit a Taxonomy Tree
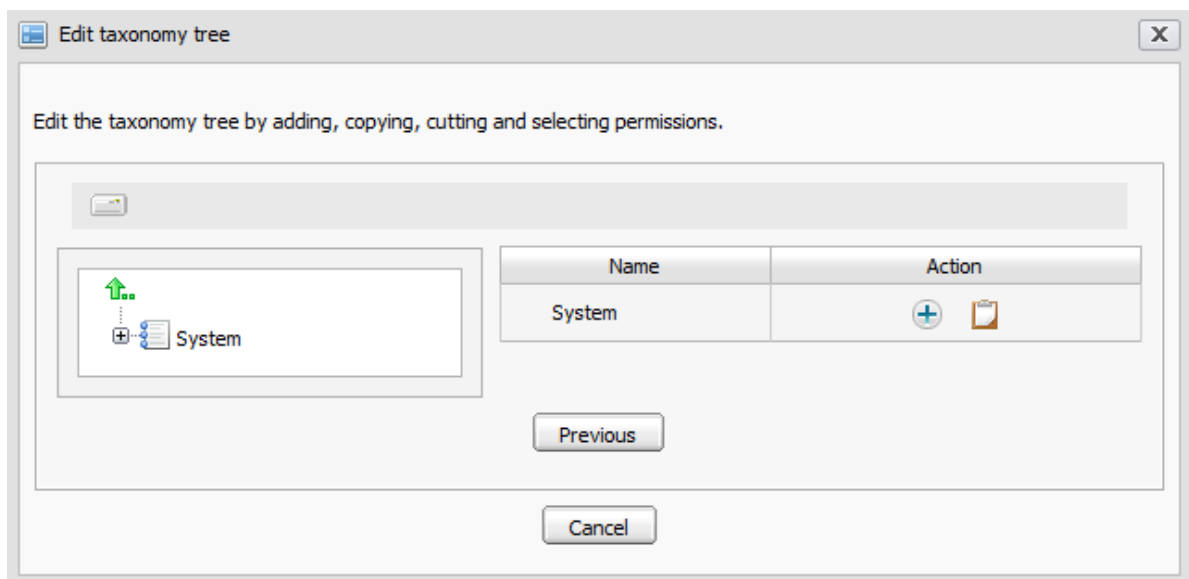
Perform the following steps to edit a taxonomy tree.

Procedure 5.12. Edit a Taxonomy Tree

1. **Step One**
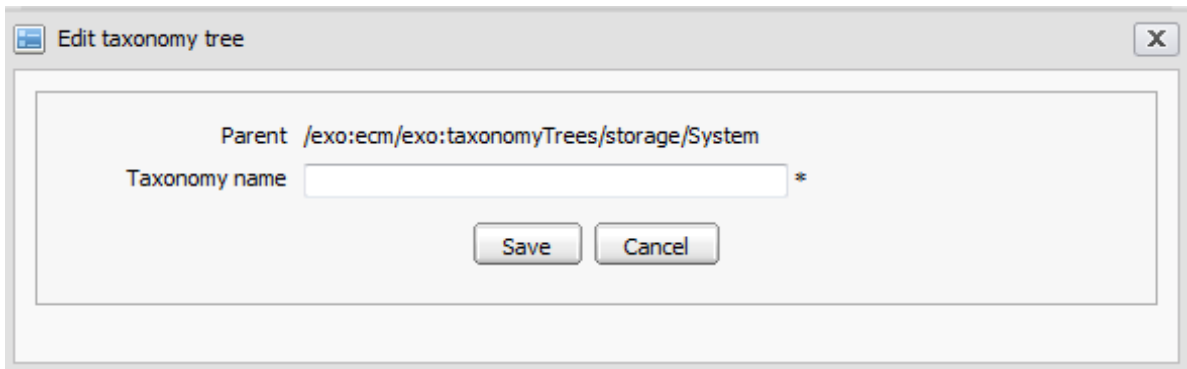
   Click   the   edit

   icon that corresponds to the taxonomy tree you want to edit.

2. **Step Two**

   Click   the

3. **Step Three**

   Enter a taxonomy name in the Taxonomy name field. (*Required).

4. **Step Four**

   Click **Save** to save the taxonomy name.

5. **Step Five**

   Click **Previous** to return to the previous steps.

6. **Step Six**

   Click **Save** tos ave all changes and the **Previous** or **Next** if you want to edit more.

> **i** **Note**
>
> - You can delete a taxonomy by clicking the trash icon corresponding to the taxonomy that you want to delete. Click OK on the confirmation message to accept deleting this taxonomy, or click Cancel to discard this action.
>
> - You cannot delete taxonomies that have been referenced.

5.3.2. Content Presentation Manager

5.3.2.1. Manage a Template

To create a node in WCM, this node must set its properties. Thus, each node needs to have a form for entering data for their properties (called the dialog template), and displaying the existing values (called the view template). The template management allows users to view, delete and modify the predefined templates or to add a new template.

Figure 5.1. Manage Templates Form

Procedure 5.13. Add a New Template

1. **Go to the Manage Templates form**

   Click **Sites Administration** → **Content Presentation** → **Manage Templates**

2. **Open a new template form**

   Click the Add button in the Manage Templates form to opent he Template form.

3. **Select the template type**

   In the **Name** drop-down box, select the template type you require.

4. **Label the template**

   Specify a name for the template in the **Label** field.

5. **Specify whether the template is a document template**

   Click the **Document Template** check box if the template you are creating should be used as a template for a document.

6. **Open Permissions dialog.**

   Click the **+** icon next to the Permissions field to open the Select Permission dialog.

7. **Assign memberships to the group**

   Select the group from the left panel and the membership from the right panel.
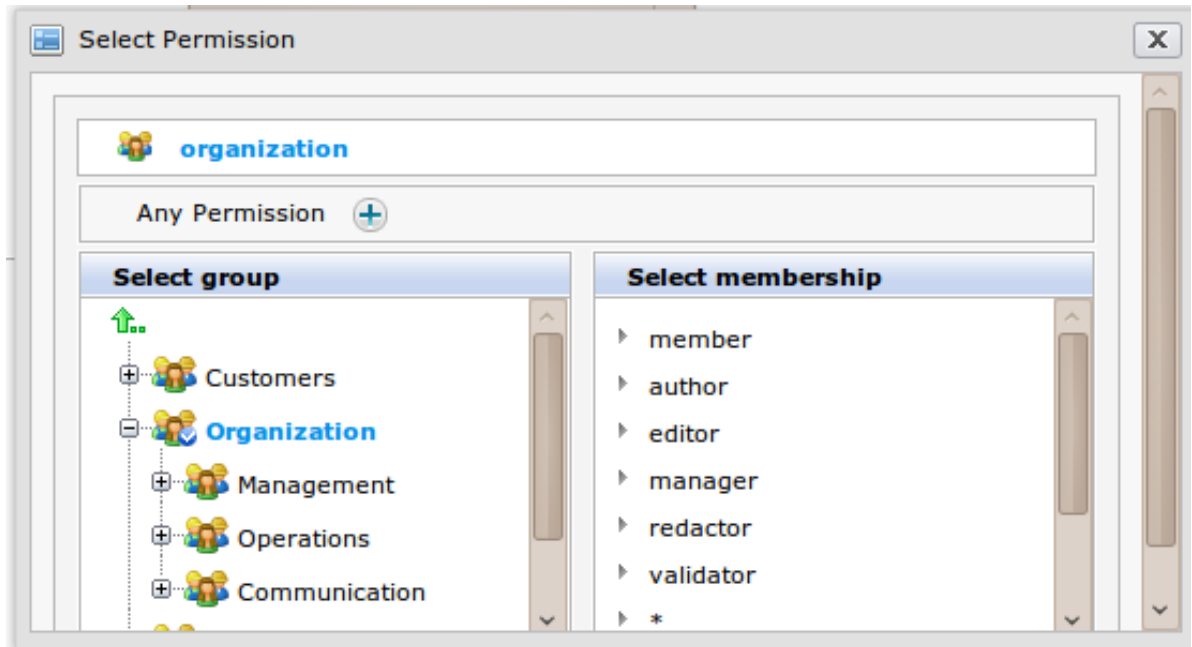
Figure 5.2. Select Permissions Dialog

8. **Add dialog content**

   Select the **Dialog** tab and enter the value in the **Dialog content** field.
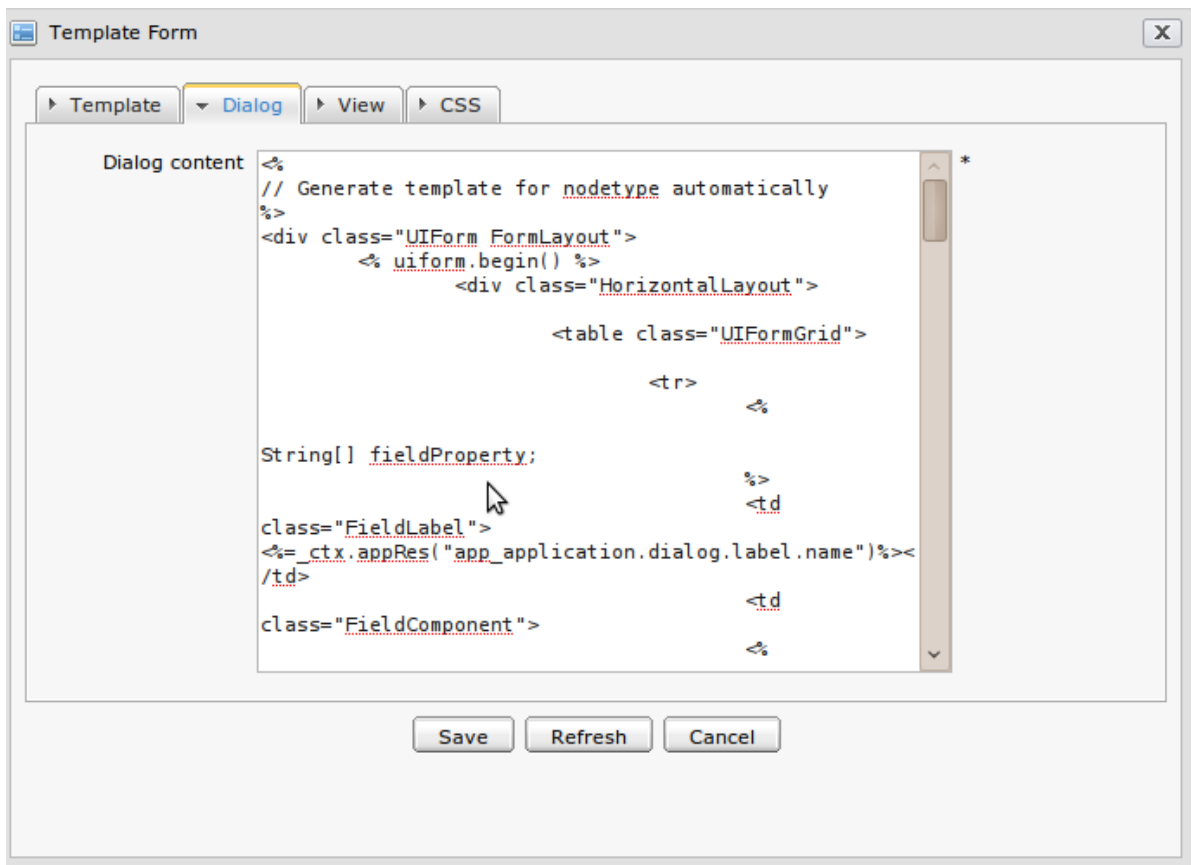
Figure 5.3. Manage Templates Dialog Tab

9. **Add view content**

   Select the **View** tab and enter the value in the **Dialog content** field.
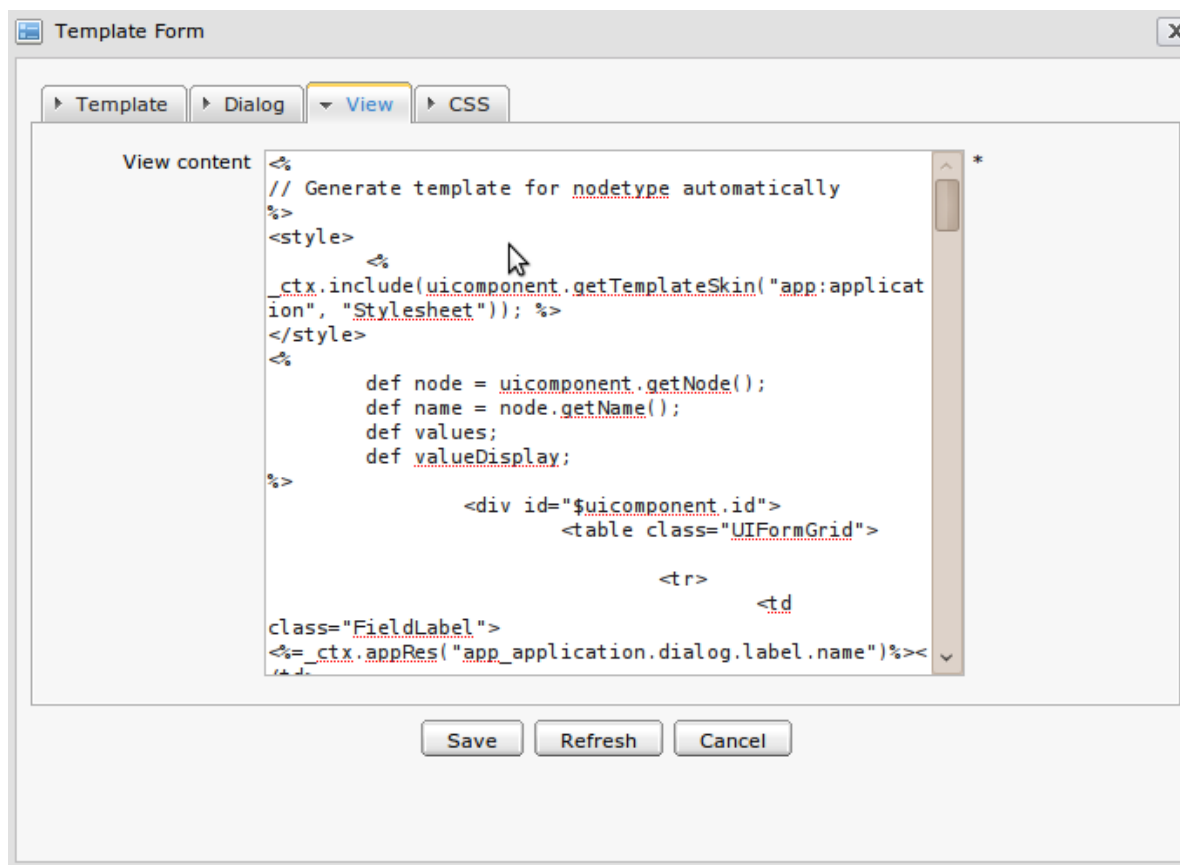
Figure 5.4. Manage Templates View Tab

10. **Add CSS content**

    Select the **CSS** tab and enter the value in the **Dialog content** field.

11. **Save template**

    Click **Save** to create the template.

Procedure 5.14. Edit a Template

1. **Go to the Manage Templates form**

   Click **Sites Administration** → **Content Presentation** → **Manage Templates**

2. **Open the View and Edit Template form**

   Click the **Pencil** icon in the Action column corresponding to the template you want to edit.

3. **Edit the Template tab**

   In the **Template** tab, you can edit the Label of the Template.

4. **Add a dialog to the Dialog tab**

To add a dialog, do the following:

a. Input content for this dialog in the ' Content ' field.

b. Input name for this dialog. (*Required).

c. Select permissions for a group that can use this dialog. (*Required).

5. **Edit an existing dialog in the Dialog tab**

To edit an existing dialog, do the following:

a. Click the **Pencil** icon in the dialog row you want to edit.

b. Edit the dialog properties.

c. Click **Save** to accept all changed in the Dialog tab.

6. **Delete an existing dialog**

To delete an existing dialog, do the following:

a. Click the **Trash Can** icon in the dialog row you want to edit.

b. Click OK to continue with deletion.

> **i** **Note**
>
> You can not delete the default dialog. You must create a new one before you
> can delete the current default dialog.

7. **Add a View to the view tab**

To add a view, do the following:

a. Click the View tab and enter content into the content field.

b. Input name for this view. (*Required).

c. Select permissions for a group that can use this view. (*Required).

8. **Edit an existing view in the View tab**

243

To edit an existing view, do the following:

    a.   Click the **Pencil** icon in the view row you want to edit.

    b.   Edit the view properties.

    c.   Click **Save** to accept all changed in the View tab.

> **i** **Notes about Editing Views**
>
> You can not change the view name.
>
> If you click **is Enable Version** checkbox, this view automatically increments one version after you click **Save**. It is displayed at ' version' column in the **View** tab.
>
> If the dialog has at least two versions, in the **View** tab, it displays the **Restore** button. You can use **Restore** to roll back to the previous View.

9.   **Delete an existing dialog in the Dialog tab**

    To delete an existing dialog, do the following:

    a.   Click the **Trash Can** icon in the dialog row you want to edit.

    b.   Click **OK** to continue with deletion.

    c.   Click **Save** to accept all changes.

Procedure 5.15. Delete a Template

1.   Click   the

    🗑

    corresponding to the template that you want to discard.

2.   Click **OK** on the confirmation message to delete the template or **Cancel** to abort the operation.

5.3.2.2. Metadata Management

Metadata in its simplest form is "data about data". Generally, it may be understood as information that describes, or supplements the central data. The metadata management allows managing nodes in the metadata format in the WCM system. The metadata may be considered as information used to describe the data. When data are provided to the end users, the metadata allow users to understand about information in more details. All metadata nodes can combine with other nodes to create a new node (add mix).

Procedure 5.16. View Metadata
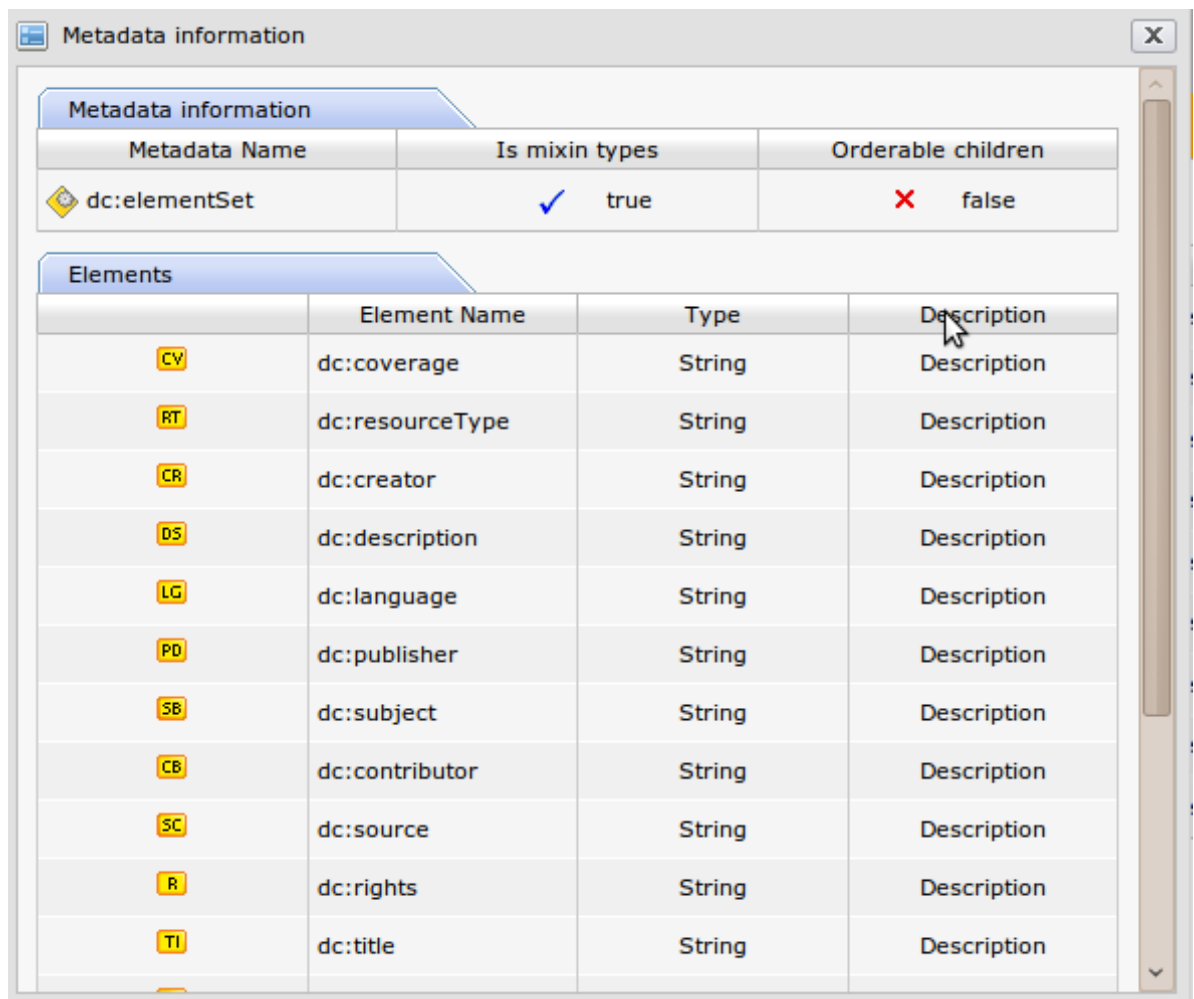
1. **Go to the Manage Metadata form**

   Click **Sites Administration** → **Content Presentation** → **Manage Metadata**

2. **Open the Metadata Information form**

   Click the magnifying glass icon corresponding to the metadata you want to view.

   The Metadata Information Form opens.

Figure 5.5. Metadata Form

Procedure 5.17. Edit Metadata

1. **Open the Edit Metadata's Template form**

   Click the **Pencil** icon in the metadata row you want to edit.

The **Edit Metadata's Template** form opens.

2. **Change the properties**

    Change the required properties of the metadata.

    > **i** **Note**
    >
    > You can not edit the metadata name.

3. **Save changes**

    Click Apply to save all metadata changes.

Procedure 5.18. Delete Metadata

1. **Click the Trash Can button**

    Click the **Trash Can** icon corresponding to the metadata you want to delete.

    A confirmation message displays.

2. **Confirm deletion**

    Click **OK** to delete the template, or **Cancel** to preserve the template.

5.3.2.3. Manage Views

The function `Manage View` is used to control view ways of a user. It has 3 tabs: **View**, **ECM Templates** and **BC Templates** tabs.

To open the Manage View function, click **Sites Administration** → **Content Presentation** → **Manage View**. The Manage View form displays.

Name	Permissions	Action Tab	Base Version	Action
taxonomy-list	*:/platform/users	[Info] [Actions]		🔍 ✏️ 🗑️
admin-view	*:/platform/administrators	[Admin] [Info] [Actions] [Collaboration]		🔍 ✏️ 🗑️
taxonomy-icons	*:/platform/users	[Actions]		🔍 ✏️ 🗑️
anonymous-view	*	[Actions]		🔍 ✏️ 🗑️
icon-view	*:/platform/users	[Actions] [Collaboration]		🔍 ✏️ 🗑️
slide-show	*:/platform/users	[Actions] [Collaboration]		🔍 ✏️ 🗑️
simple-view	*:/platform/users	[Actions] [Collaboration]		🔍 ✏️ 🗑️
system-view	*:/platform/administrators	[Info]		🔍 ✏️ 🗑️
timeline-view	*:/platform/administrators	[Actions] [Collaboration]		🔍 ✏️ 🗑️
cover-flow	*:/platform/users	[Actions] [Collaboration]		🔍 ✏️ 🗑️

Add View

Figure 5.6. Metadata Form

Views Tab. The procedures that follow describe how to Add, Edit, Delete, and Preview views.

Procedure 5.19. Add View

1. **Open the Add View form**

   Click the **Add View** button located at the bottom of the **Manage View** form.

   The Add View form opens.

2. **Define View Name**

   In the Name field, specify the name of the view you are creating. The name must be unique, and must only contain standard alphanumeric characters.

3. **Assign memberships to the group**

   Select the group from the left panel and the membership from the right panel.
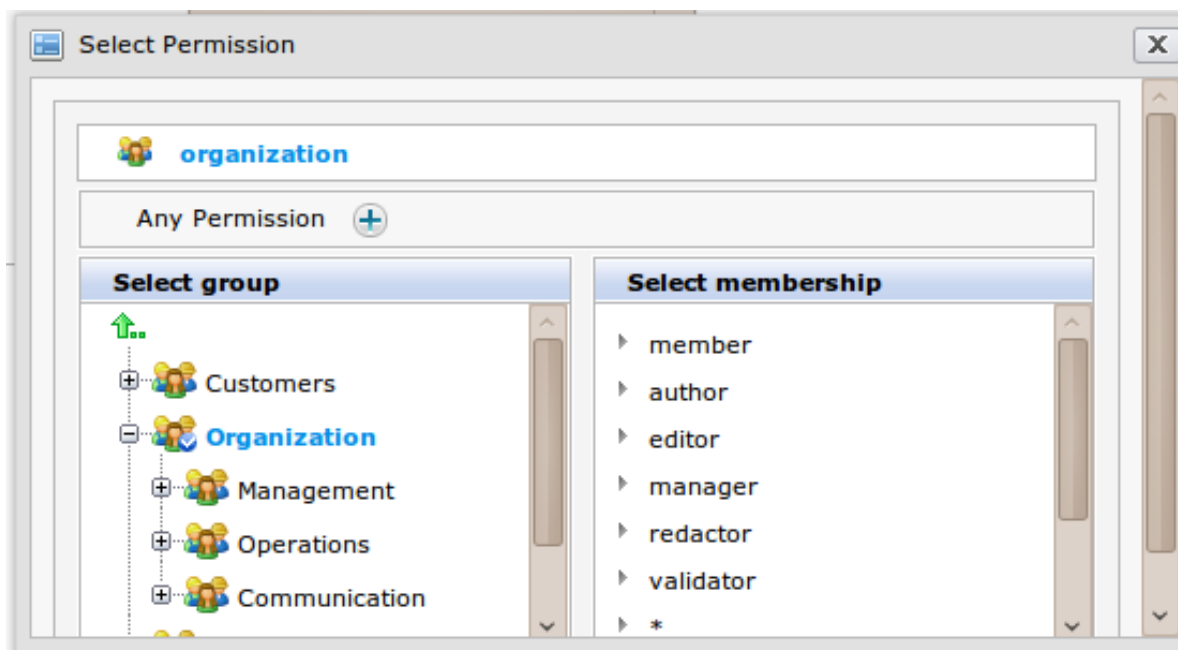
Figure 5.7. Select Permission Dialog

4. **Select the Templates view**

   Click the **Templates** field and select the correct template for this view.

5. **Save the View**

   Click **Save** to apply all settings and close the form.

Procedure 5.20. Edit a View

1. Click the **Pencil** icon in the view row you want to edit.

2. Edit the view properties.

   > **Notes about Editing Views**
   >
   > You can not change the view name.
   >
   > If you click **Enable Version** checkbox, this view automatically increments one version after you click **Save**. It is displayed at ' version' column in the **View** tab.
   >
   > If the dialog has at least two versions, in the **View** tab, it displays the **Restore** button. You can use **Restore** to roll back to the previous View.

3. Click the **Add Tab** button to open the **Tab Form** tab to add more tabs.

a. Click the **Add Tab** button to add more tabs after the initial tab has been added.

b. Click the **Reset** button to change values for fields.

c. Click the **Back** button to return to the **View Form** tab in the **Edit View** form.

4. Click **Save** to accept all changed in the View tab.

Procedure 5.21. Delete Views

1. **Click the Trash Can button**

   Click the **Trash Can** icon corresponding to the view you want to delete.

   A confirmation message displays.

2. **Confirm deletion**

   Click **OK** to delete the view, or **Cancel** to preserve the view.

   > **i** **Note**
   >
   > You can not delete a view that is in use.

Procedure 5.22. Preview a View

1. Click the Magnifying Glass icon in the Action column of the view you want to preview.

   The View form opens.
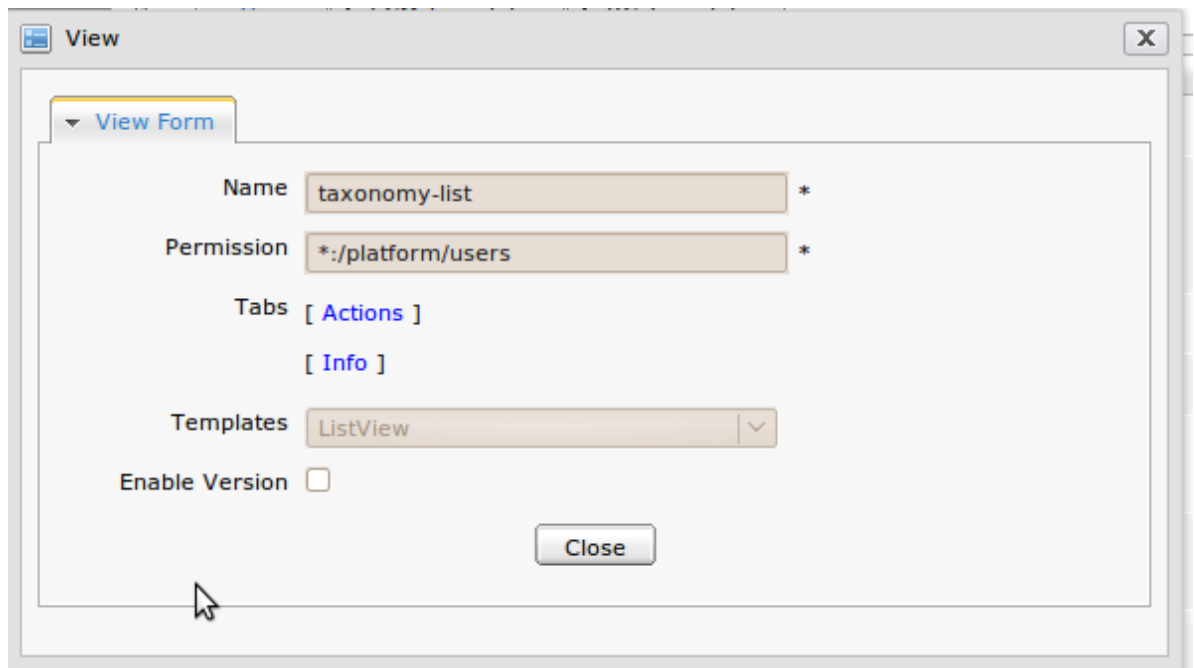
Figure 5.8. View Dialog

2.   Click Close to exit the View Form.

5.3.2.3.1. ECM Templates
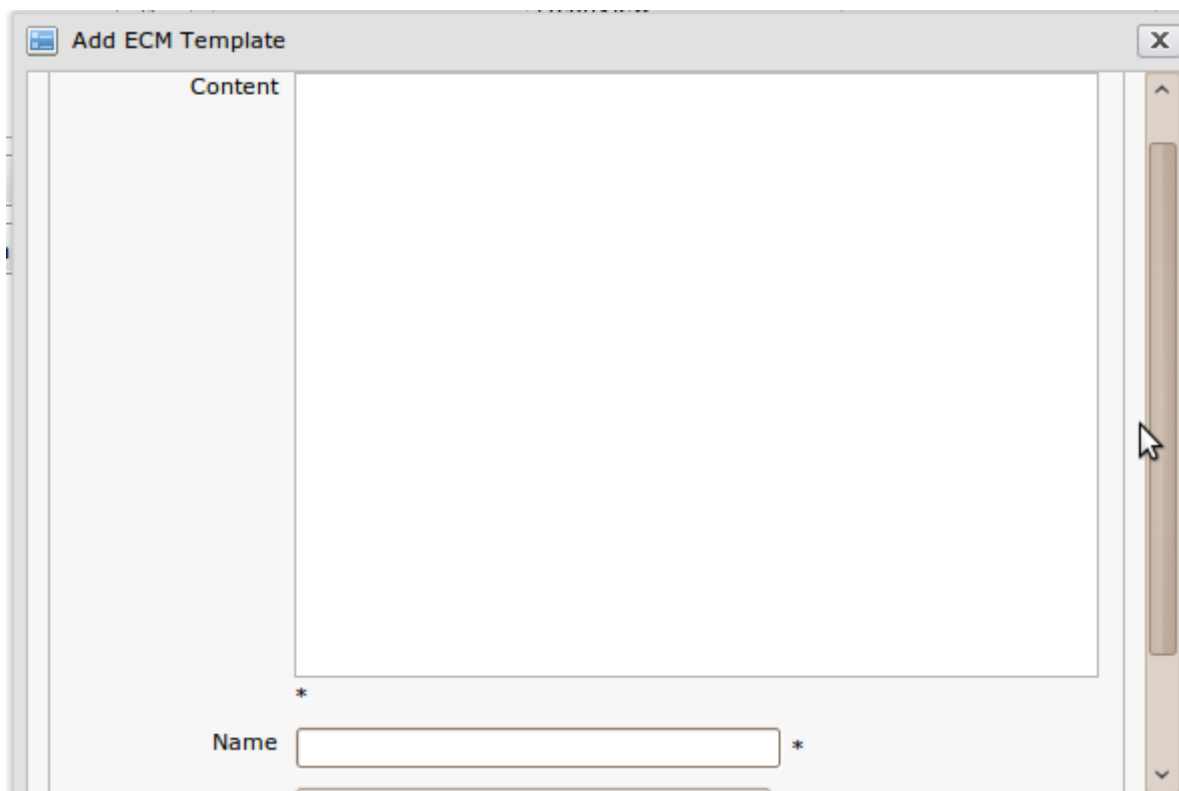
Figure 5.9. ECM Templates

Procedure 5.23. Add a new ECM Template

1. Select the ECM Templates tab.

2. Click the **Add** button to open the Add ECM Template form.

Figure 5.10. The Add ECM Template form

3.   Input the content of the template in the "Content" field.

4.   Input a name for the template in the "Name" field.

5.   Select a type for the template in the "Template Type" field.

6.   Click **Save** to accept adding a new template, or click **Reset** to change values, or **Cancel** to quit without any changes.

Procedure 5.24. Editing a Template

1.   Click the **Pencil** icon next to the template you want to edit.
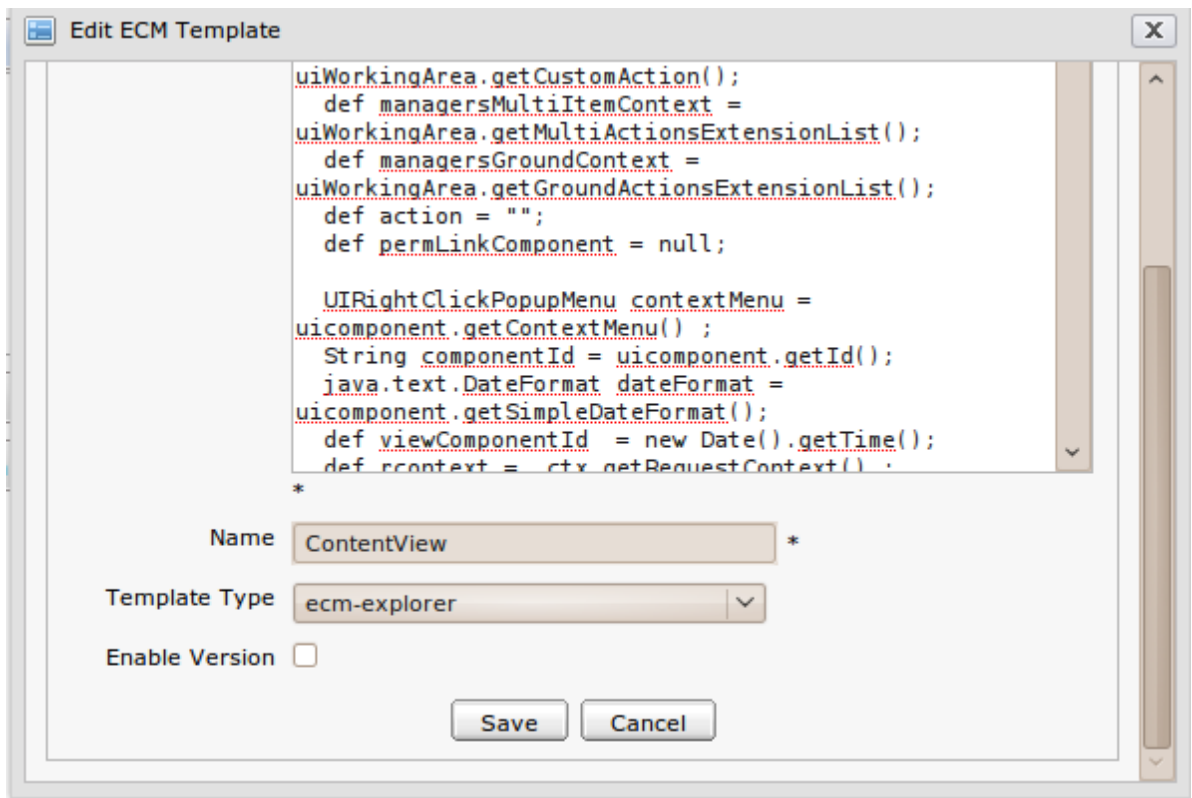
Figure 5.11. Editing an ECM Template Form

2. Change the current template's properties.

3. Click **Save** to accept all changes, or **Cancel** to quit without any changes.

> **i** **Note**
>
> You can not edit the template name.
>
> If you tick the 'Enable Version' checkbox, this template will automatically increase to 1 version after you have clicked Save. It is displayed at the 'Base version' column in 'ECM template' tab.
>
> If the template has at least 2 versions, in the 'Edit ECM Template' form, it displays the Restore button that allows restoring the template version.

Procedure 5.25. Delete a Template

1. Click the **Trash** icon corresponding with the template you want to edit. A confirmation message will appear.

2. Click **Ok** to accept deleting this template, or **Cancel** to discard this action.

5.3.2.3.2. BC Templates

Figure 5.12. BC Templates form

Procedure 5.26. Adding a New Template

1. Click **Add** to open the Add BC Template form.
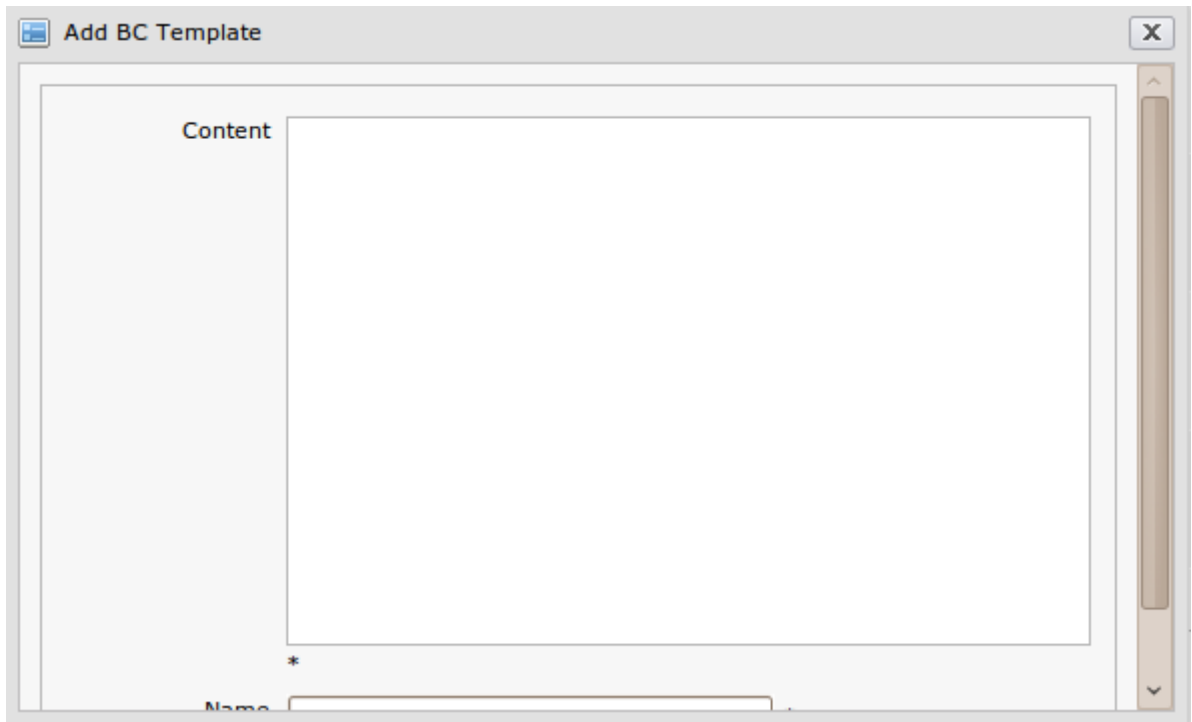
Figure 5.13. The Add BC Template form

2. Input the content for the template in the Content textbox. (*Required).

3. Input the name for the template in the Name field. (*Required).

4. Select the template type from the dropdown box in the Template Type form.
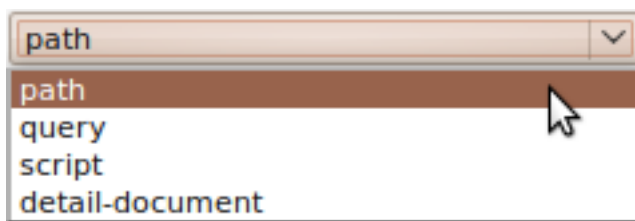
Figure 5.14. Dropdown Box
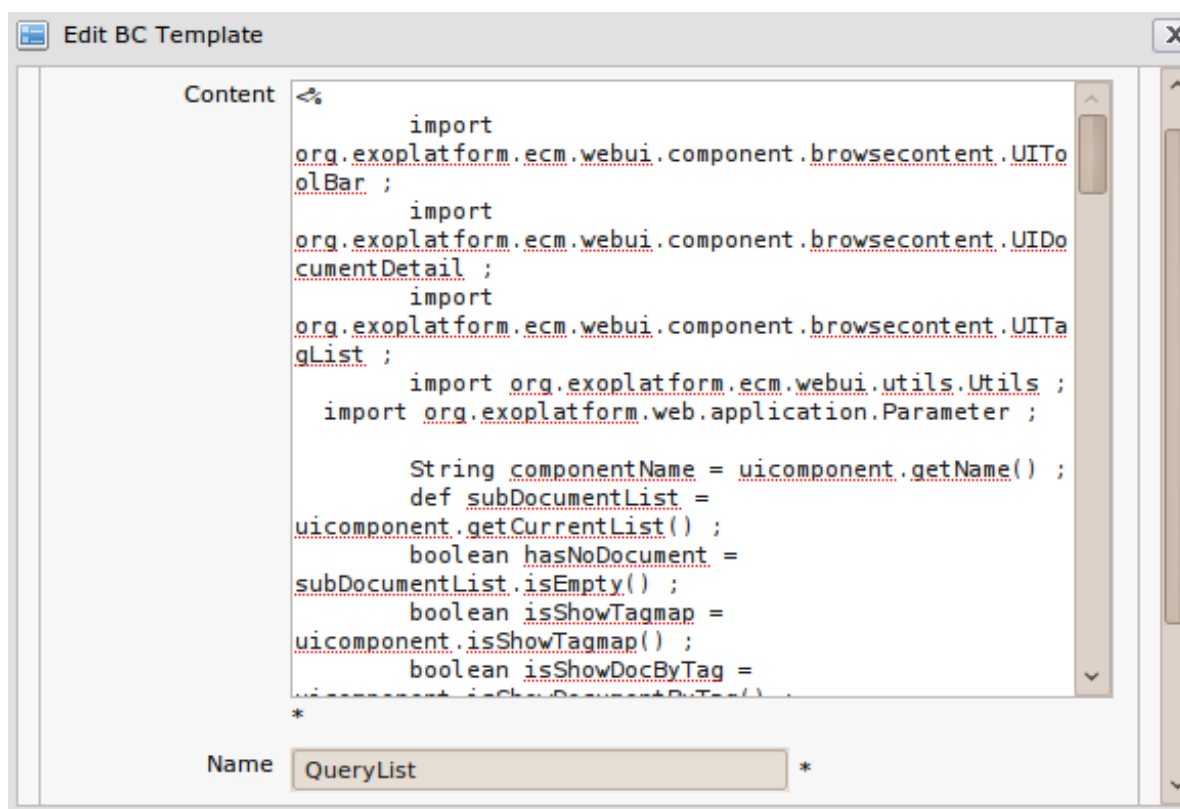
> **Note**
>
> The name must be unique.
>
> The name must not contain special characters like !,@,#,$,%,&,*,(,).

5. Click **Save** to complete adding a new template.

Procedure 5.27. Edit a BC Template

1. Click the **Pencil** icon on a template that you want to edit.

Figure 5.15. The Edit BC Template Form

2. Change the current template's properties.

3. Click **Save** to accept all changes, or **Cancel** to quit without any changes.

> ### Note
>
> You can not edit the template name.
>
> You can not edit the template type.
>
> If you tick the 'Enable Version' checkbox, this template will automatically increase by 1 version after you have clicked Save. It is displayed at the 'Base Version' column in ECM Template tab.
>
> If the template has at least 2 versions, in the 'Edit ECM Template' form, it displays the Restore button that allows restoring the template version.

Procedure 5.28. Delete a Template

1. Click the **Trash** icon corresponding with the template you want to edit. A confirmation message will appear.

2. Click **Ok** to accept deleting the template, or **Cancel** to discard this action.

5.3.2.4. Drives Management

The function is used to manage drives in the File Explorer. It allows adding, editing and deleting drives.

Go to **Sites Administration**, then **Content Presentation**, and finally **Manage Drives**.

5.3.2.4.1. Add a new drive

Use the *Add A New Drive* to add a new drive.

Procedure 5.29. Add A New Drive

1. **Step One**

   Click the **Add Drive** button in the **Manage Drives** form to open the **Add Drive** form.

2. **Step Two**

   Input a name for the new drive in the **Name** field. (*Required).

3. **Step Three**

   Select a workspace for the drive. There are 4 available workspaces: system, collaboration, backup, and dms-system.

4. **Step Four**

   Select the home path for the drive by clicking the
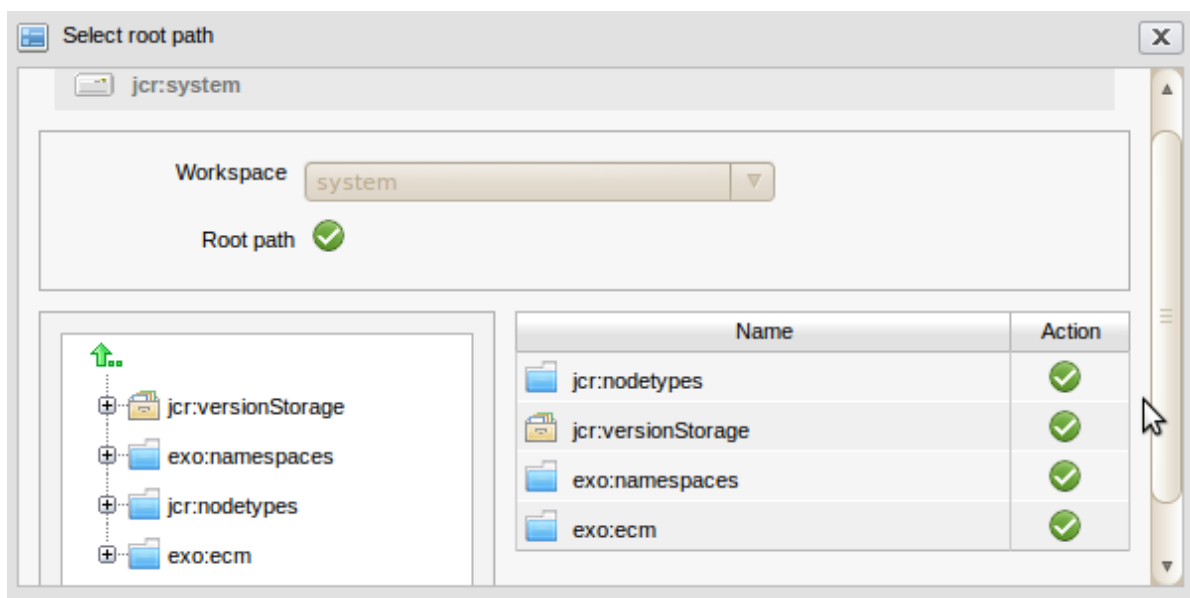
   icon

5. **Step Five**

   Click   the

   icon to select the home path.

6. **Step Six**

   Select   an   icon   for   the   workspace   by   clicking   the
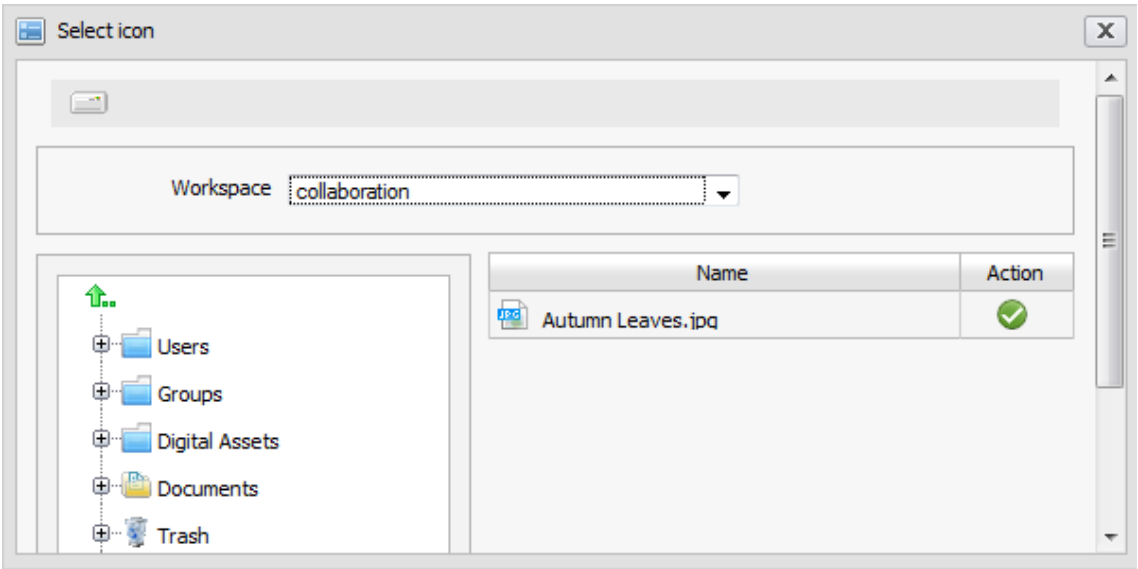
7. **Step Seven**

   Click

   to select an icon file:

8. **Step Eight**

   Select permissions for groups that have access rights to this drive by clicking the

   icon.

9. **Step Nine**

   Select or unselect the various checkboxes to hide or show the corresponding drive elements:

   Show referenced document
       Allows viewing preference documents.

Show non-document
> Allows viewing non-documents.

Show sidebar
> Allows showing the sidebar.

Show hidden node
> Allows showing the hidden nodes.

10. **Step Ten**

Select the document type that will be created in this drive:

Folder
> Only **nt:folder** folders can be created in this drive.

Unstructured folder
> Only **nt:unstructured** folders can be created in this drive.

11. **Step Eleven**

Click

to select a node type. The **Select node types** form will appear:

Enter a node name to search for in the **Node type name** field and click the

to begin searching.

All the node types matching the search string will appear in a list below.

Check the box correpsonding to the desired node type in the **Select** column, or click the

beside **Choose all node types** to select all results.

If you click the icon, the **Allowance nodetype on left tree** becomes a required field (indicated by an asterix '*')

Click   the

if you want to remove the selected nodetype.

12. **Step Twelve**

Select the **Apply Views** tab and select the view type you want to be available in the drive:

13. **Step Thirteen**

   Click **Save** to commit the details and create the new drive, **Refresh** to clear the form or **Cancel** to abort the operation.

Procedure 5.30. Edit a drive

1. **Step One**

   Click   the

   icon that corresponds to the drive you want to edit. The **Edit drive** for will appear:

2. **Step Two**

   Edit the properties as required.

3. **Step Three**

   Click **Save** to commit the changes.

> **i**   **Drive Name**
>
> The drive name can not be edited in this form.

Procedure 5.31. Delete a drive

1. **Step One**

   Click   the

   🗑

   that corresponds to the drive you want to delete.

2. **Step Two**

   Click **OK** on the confirmation message to delete the drive or click **Cancel** to abort the operation.

5.3.3. Types of Content

5.3.3.1. The Namespace Registry

The namespace is used as a prefix for the node type that describes all the node type properties. This function allows users to register the namespace used in the system.

Namespace Registry

Prefix	Namespace Uri
app	http://www.gatein.org/jcr/application-registry/1.0/
dc	http://purl.org/dc/elements/1.1/
exo	http://www.exoplatform.com/jcr/exo/1.0
fn	http://www.w3.org/2005/xpath-functions
fn_old	http://www.w3.org/2004/10/xpath-functions
Fwd	http://www.exoplatform.com/jcr/Fwd/1.1/
jcr	http://www.jcp.org/jcr/1.0
kfx	http://www.exoplatform.com/jcr/kfx/1.1/
lgn	http://www.gatein.org/jcr/autologin/1.0/

Total pages: 3 « ‹ **1** 2 3 › »

Register

Figure 5.16. Namespace Registry

Procedure 5.32. Registering a Namespace

1. Click the **Register** button on the Namespace Registry form to register a new namespace.
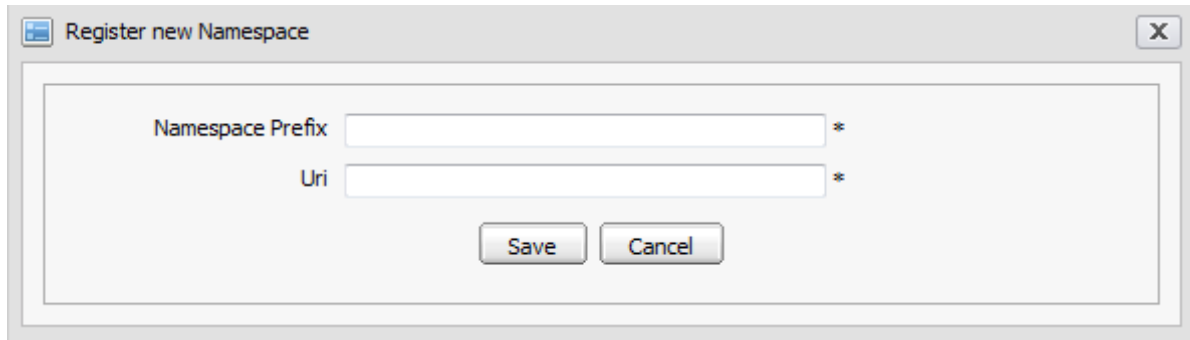
Figure 5.17. Namespace Registration Form

2. Enter the value for the Namespace Prefix field. (* Required).

3. Enter the value for the Namespace Prefix field. (* Required).

4. Enter the value for the Uri field. This field must be unique. (*Required).

> **Important**
>
> The namespace must not contain special characters like !,@,#,$,%,&,*,(,).

5.3.3.2. Manage Node Types

This function is used to control all node types in WCM.

Figure 5.18. The Manage Node Type Form

5.3.3.3. View Node Types

1. Click the icon that corresponds to the node to be reviewed. The View Node Type Information form will appear.

Figure 5.19. View Node Type Information Form

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

Procedure 5.33. Add Node Type

1. Open the Add/Edit Node Type Definitions form by clicking the **Add** button on the Manage Node Type Form.

Figure 5.20. Add Node Type Form

2. Select a name space for the node. It looks like a node prefix.

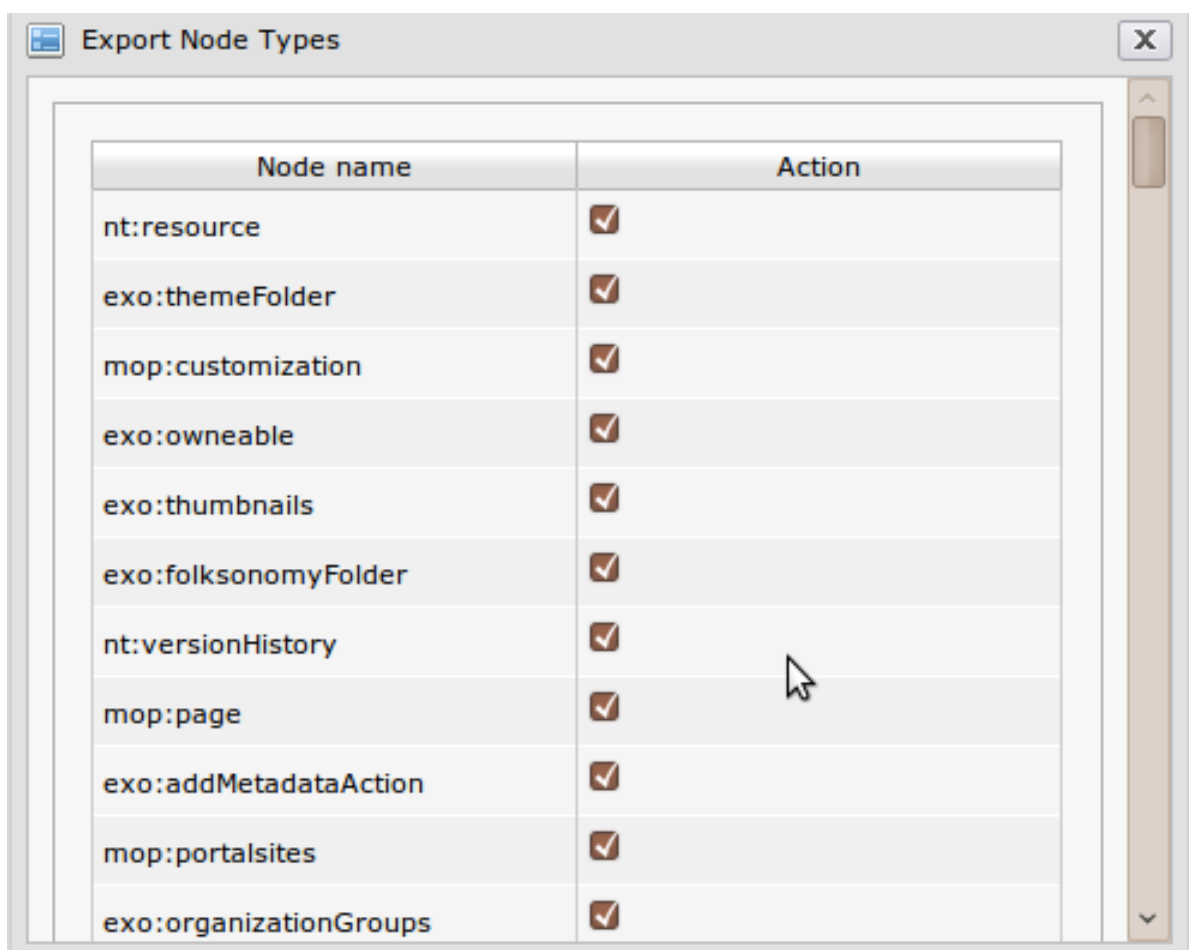3. Enter a node name for the Node type name field. This field is required, and must be unique.

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

4. Select a value for the "Is mixin type" field.

    *   True: this node is mixin type.

    *   False: this node is not mixin type.

5. Select a value for the "Orderable child nodes" field:

    *   True: child nodes are ordered.

    *   False: child nodes are not ordered.

6. Enter a value for the Primary item name field.

7. Super Types: Click the **+** button to add more parent types.

8. Property definitions: lists all definition names of Property tab.

9. Child node definitions: lists all definition names of Child node tab.

10. Click **Save** to accept adding a new node type, or **Save draft** to save this node type as a draft, or **Cancel** to quit.

Procedure 5.34. Export Node Types

1. Open the Export Node Types form by clicking the **Export** button on the Manage Node Type Form.

Figure 5.21. Export Node Types Form

2. Click **Uncheck all** if you do not want to export all node types. After clicking **Uncheck all**, this button becomes the **Check all** button.

3. Select nodes that you want to export by ticking the checkboxes.

4. Click the **Export** button in this form.

5. Select the location in your computer to save the exported node.

> **Important**
>
> You must select at least 1 node type to be exported. If you do not want to export the node, click **Cancel** to quit this pop up.

Procedure 5.35. Import Node Types

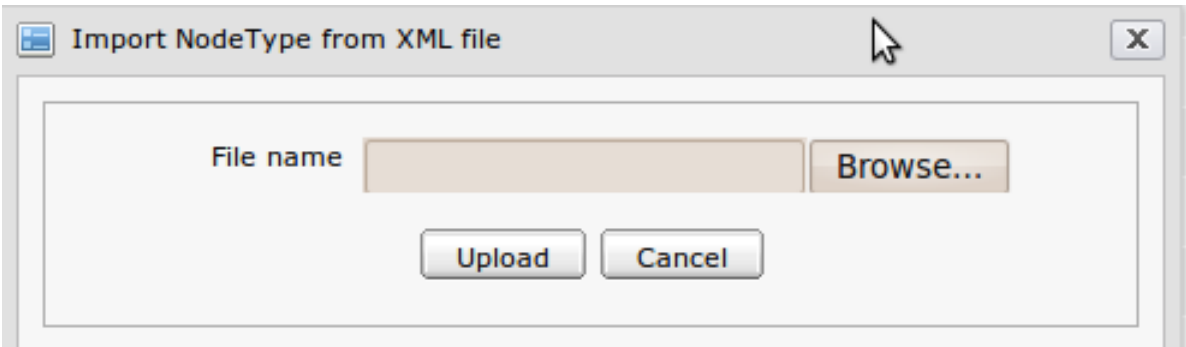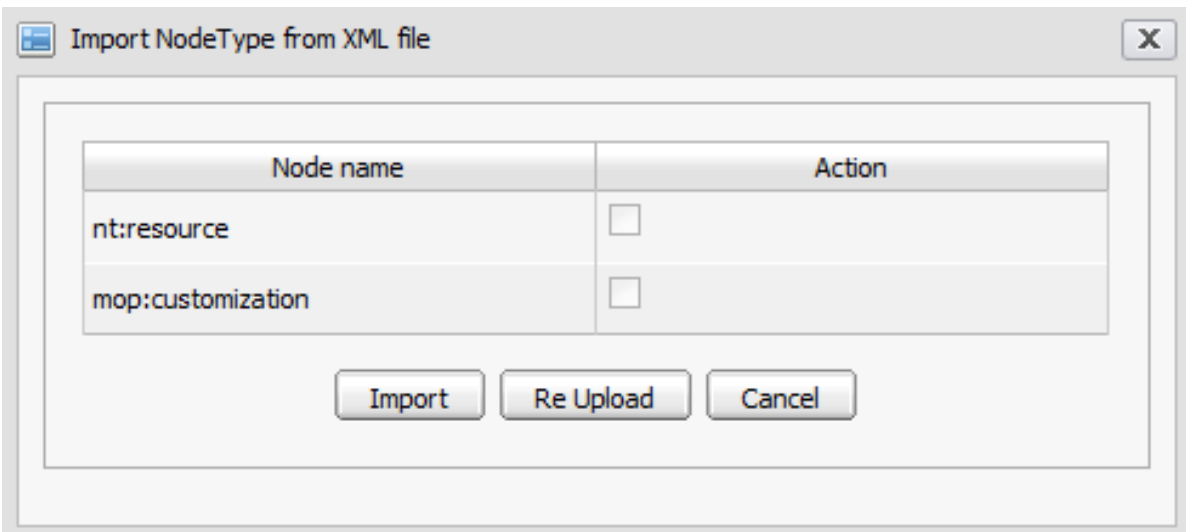1. Open the Import Node Type from XML file form by clicking the **Import** button on the Manage Node Type Form.

Figure 5.22. Import Node Type from XML file Form

2. Click the **Browse** button to upload a file.

Figure 5.23. Browse for XML files containing Node Types

> **Important**
> 271
>
> You must upload an XML file. This file is in the node type's format.

3. Click the **Upload** button.

> **Note**
>
> If you want to upload a different file, click the **trash**icon to delete the file which has just been uploaded, then upload other files.

4. Tick the checkboxes corresponding to the nodes that you want to import.

5. Click the Import button to complete importing a node type.

5.3.4. Advanced Configuration

5.3.4.1. Manage Queries

The function is used to manage queries. It allows adding, editing and deleting queries.

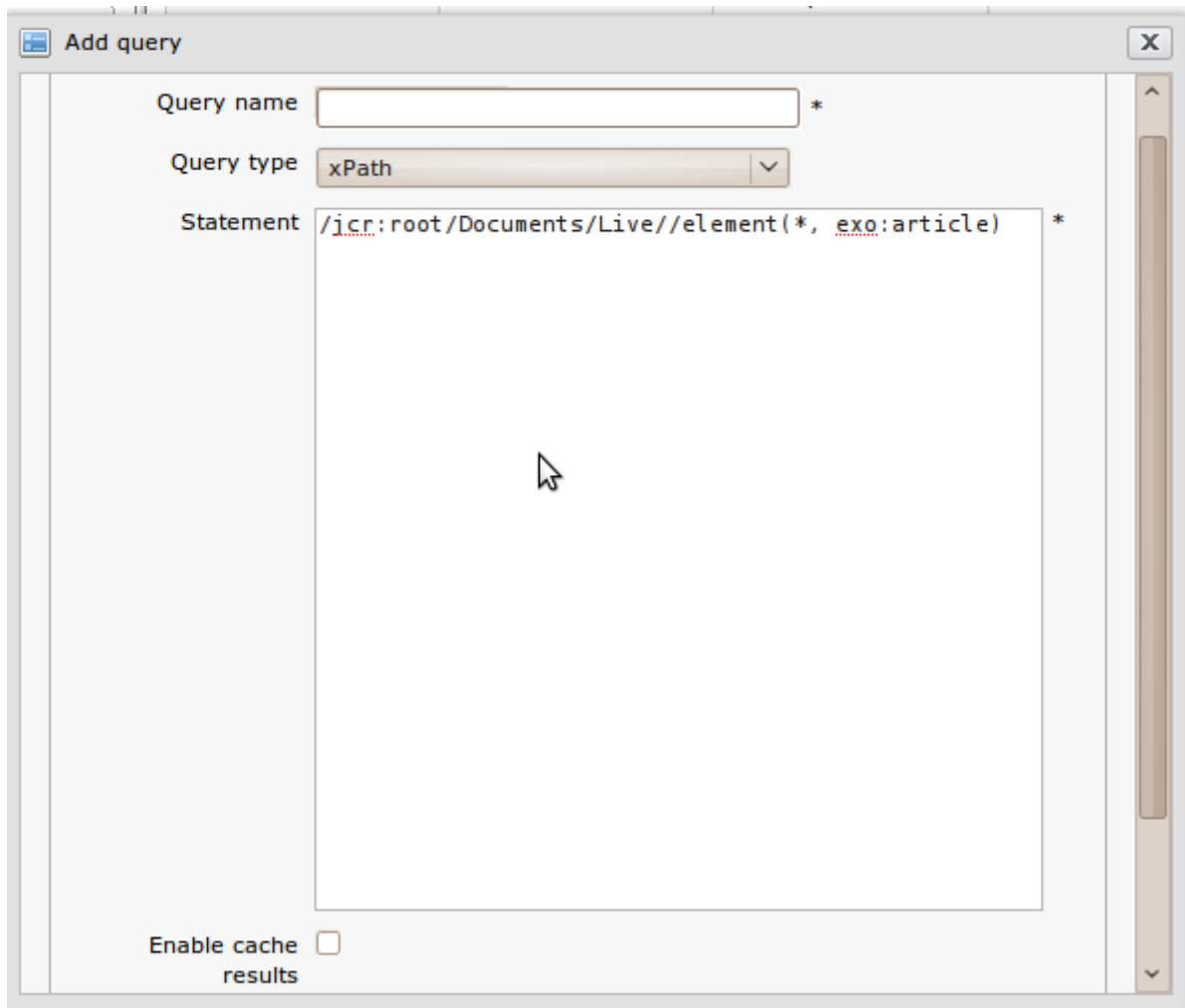Go to **Sites Administration | Advanced Configuration | Manage Queries.**

Name	Type	Statement	Permissions	Actions
All Articles	xpath	//element(*,exo:article) order by @exo:dateCreated descending	*:/platform/users	✏ 🗑
Created Documents	xpath	//*[(@jcr:primaryType = 'exo:article' or @jcr:primaryType = 'nt:file') and @exo:owner='${UserId}$' order by @exo:dateCreated descending	*:/platform/users	✏ 🗑
CreatedDocumentDayBefo	xpath	//element(*,exo:article) [@exo:dateCreated < xs:dateTime('${Date}$')] order by @exo:dateCreated descending	*:/platform/users	✏ 🗑

Add Query

Procedure 5.36. Add a new query

1. Show the Add Query form by clicking the Add Query button in the Manage Queries form.
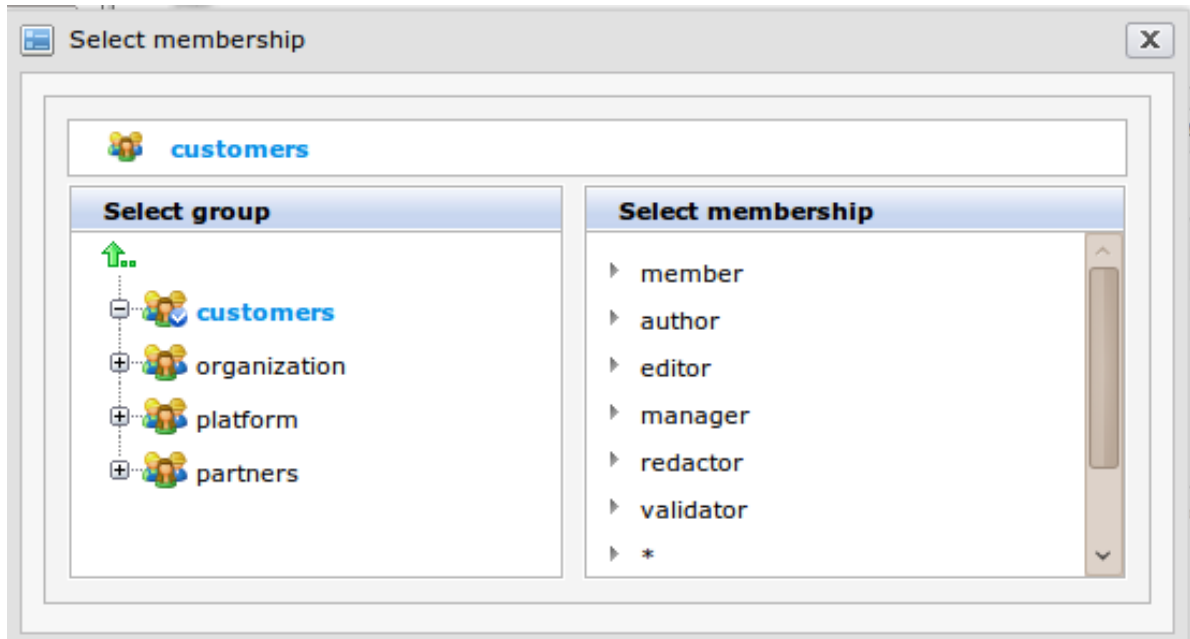

2. Enter a query name for the **Name** field.

3. Select the query type.

    - **Xpath**: (XML Path Language) is a language for selecting nodes. For example, `/jcr:root/Documents/Live`

    - **SQL**: (Structured Query Language) is a database computer language.

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

5. Check or uncheck the 'Enable cache results' option. If you tick this checkbox, for the fist time you use this query to search, the result will be cached. For the second time you search using this query, it will show the cached results. After 45minutes, the cache will be removed.

    For example: you have the query `Test` with statement `//element (*, nt:file)`. In the File Explorer, you have a `nt:file` document named `File1`. When you execute the query `Test`,

only document `File1` will be shown. After that, create a `nt:file` document named `File2` and execute query `Test`, only document `File2` document will be listed. After 45 minutes, the cache will be removed. When you execute the query `Test`, the documents `File1` and `File2` will be listed.

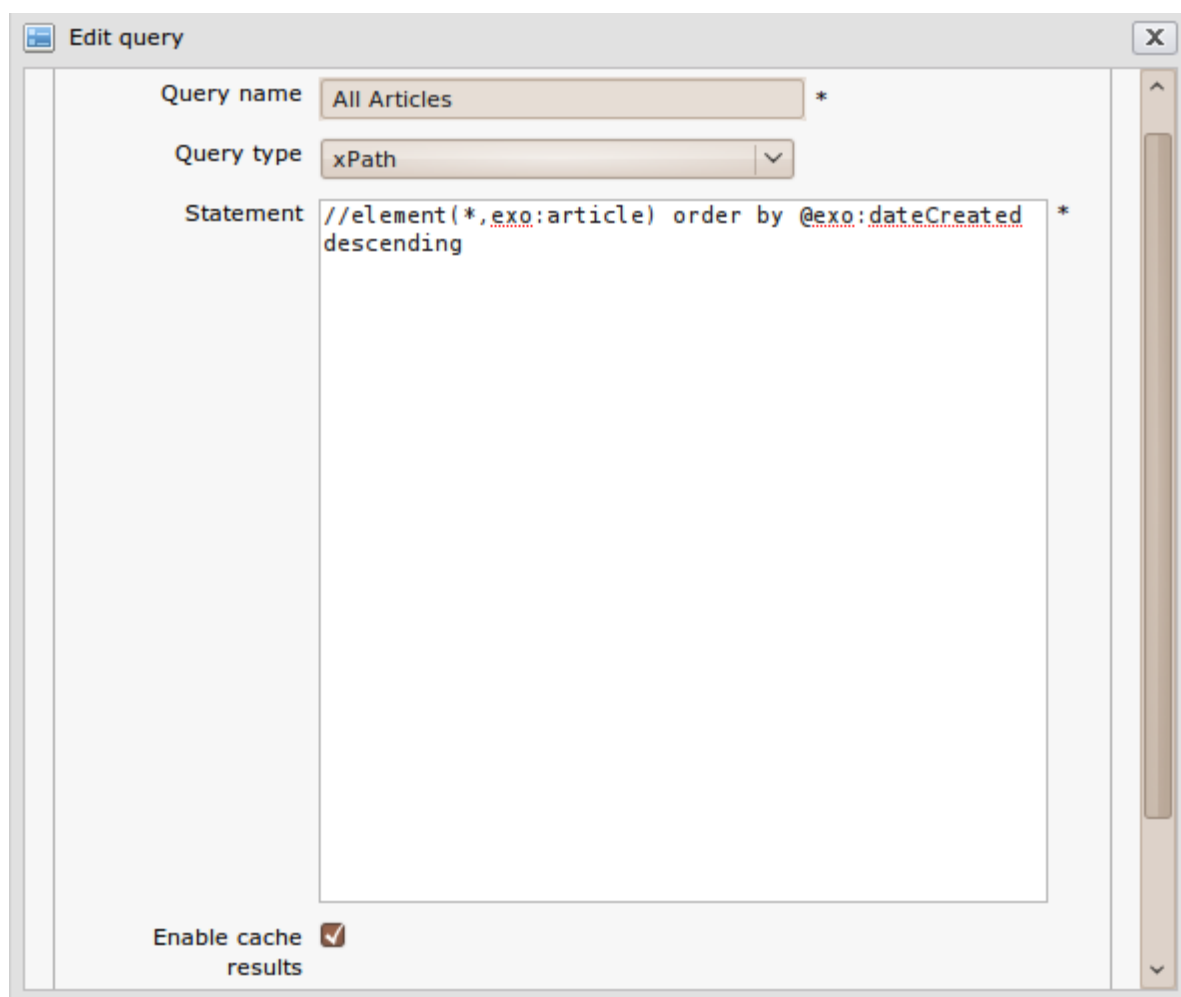6. Select permissions for a group that can use this query by clicking

7. Click **Save** to finish adding a new query.

Procedure 5.37. Edit a query

1. Click   the

icon corresponding to the query you want to edit. The **Edit Query** form will appear:

2. Edit the properties of the selected query.

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

Procedure 5.38. Delete a query

1. Click

   corresponding to the query you want to delete. A confirmation message will appear.

2. Click **OK** to accept deleting this query, or **Cancel** to discard this action.

5.3.4.2. Manage Scripts

The function allows users to manage all script codes in the **WCM** and Browser Content system.

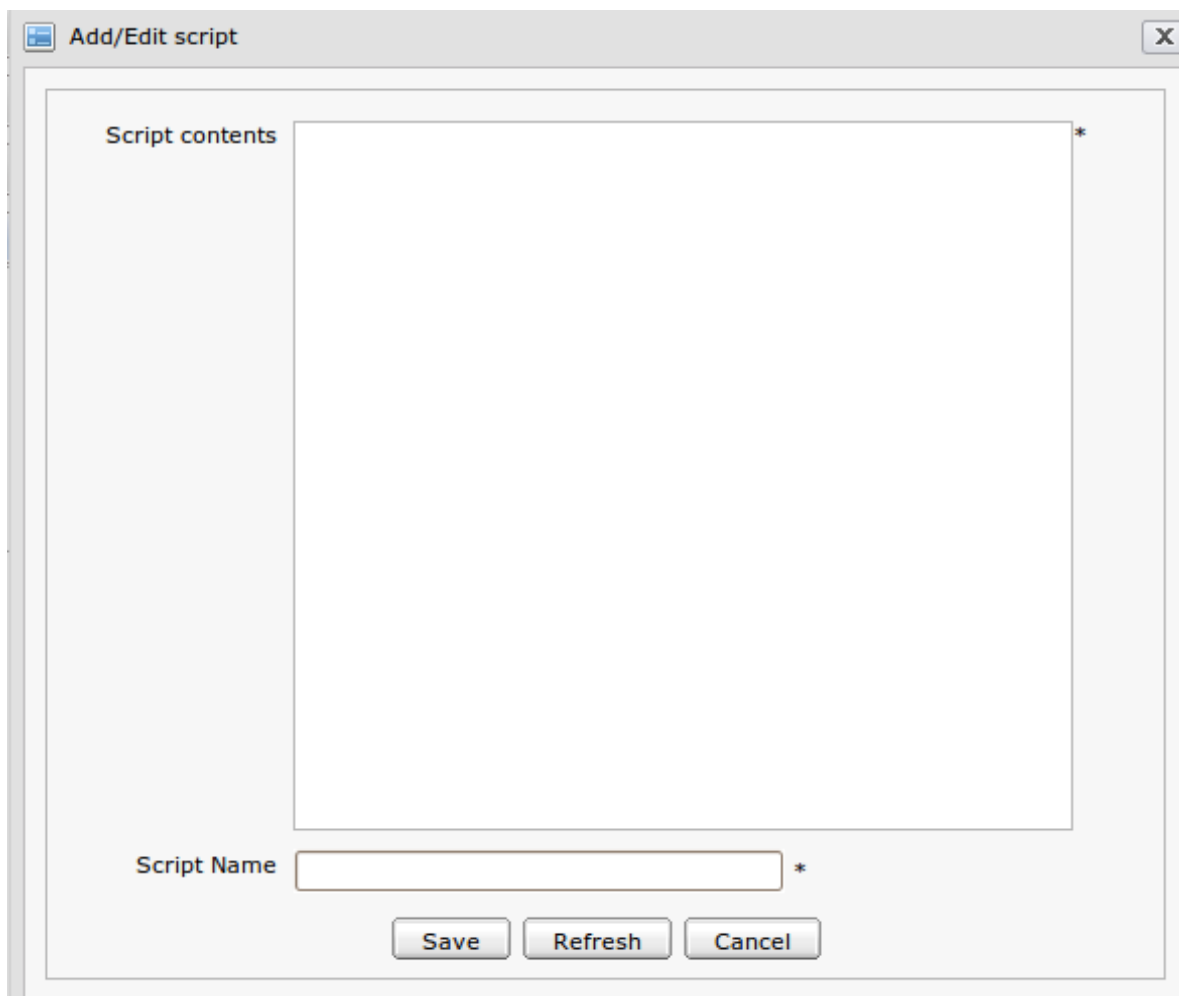Go to **Sites Administration | Advanced Configuration | Manage Scripts**.

Details:

- **WCM** Scripts: scripts are used in **WCM**

- BC Scripts: scripts are used in Content Browser.

- **ECM Scripts tab**

Procedure 5.39. Add a new script in ECM

1. Select **ECM Scripts** tab in the **Manage Script**.

2. Click the **Add** button to open the **Add/Edit script** form:

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

4. Enter a script name for the **Script name** field.

- The script name must be unique.

- The name must not contain special characters such as !,@,#,$,%,&,*,(,).

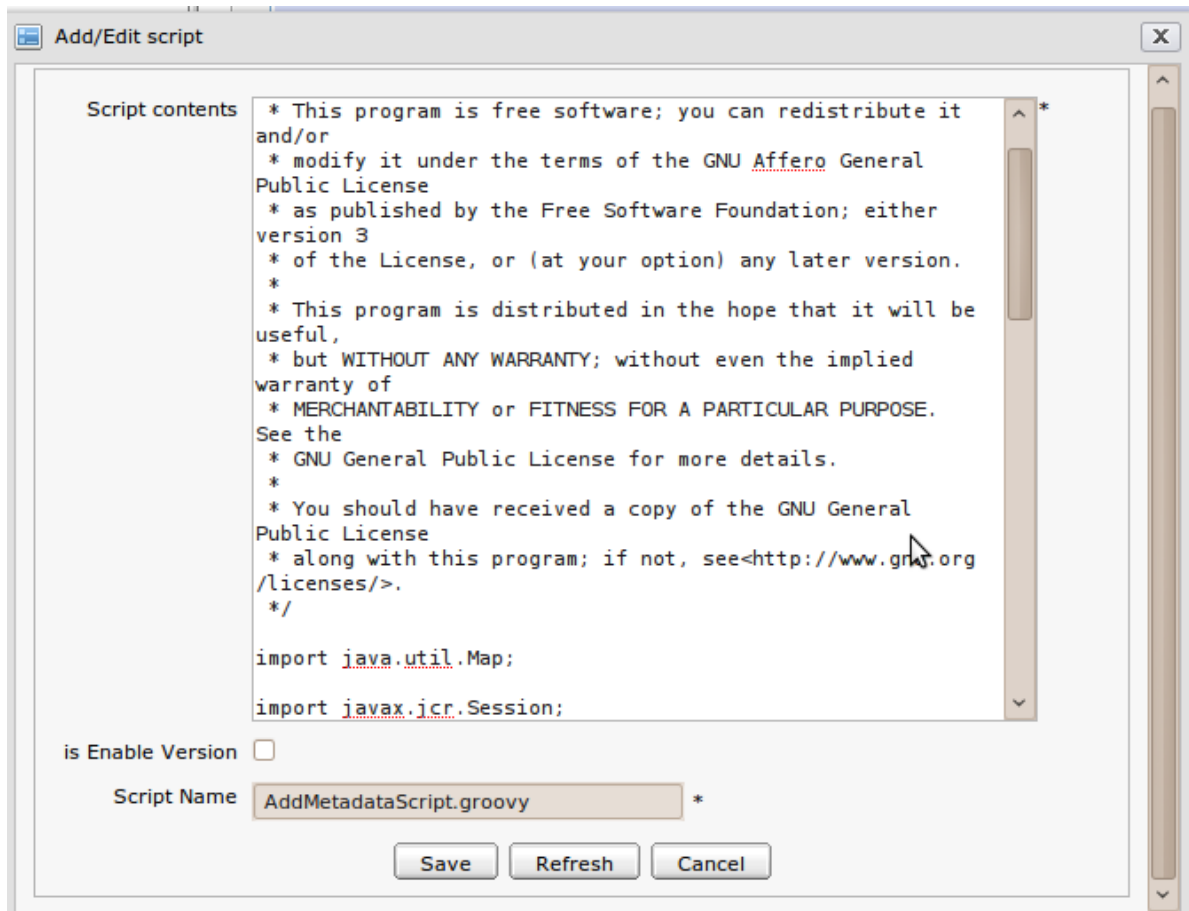5. Click **Save** to accept adding the new script.

Procedure 5.40. Edit an ECM script

To edit an ECM script, do as follows

1. In the **ECM Scripts** tab, click the

icon that corresponds to the script that you want to edit. The **Add/Edit script** form will appear:

2. Edit the properties in this form.

3. Click the **Save** to save all changes.

Procedure 5.41. Deleting an ECM script

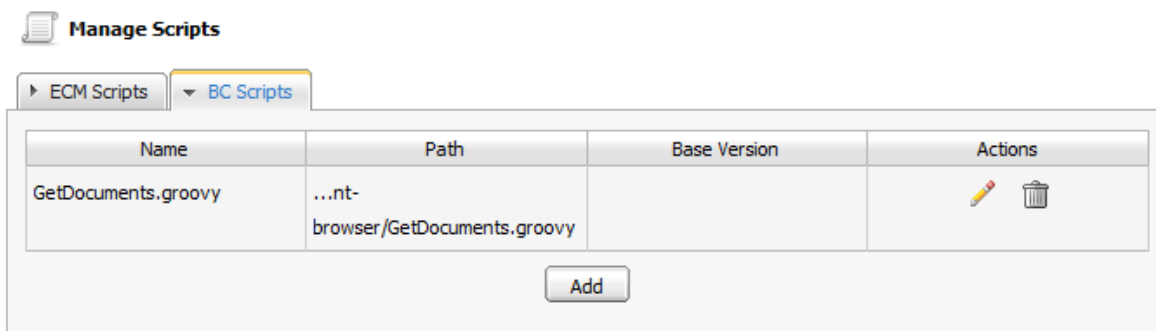To delete an ECM script, do as follows:

1. In the **ECM Scripts** tab, click

   on the script that you want to delete. A confirmation message will appear.

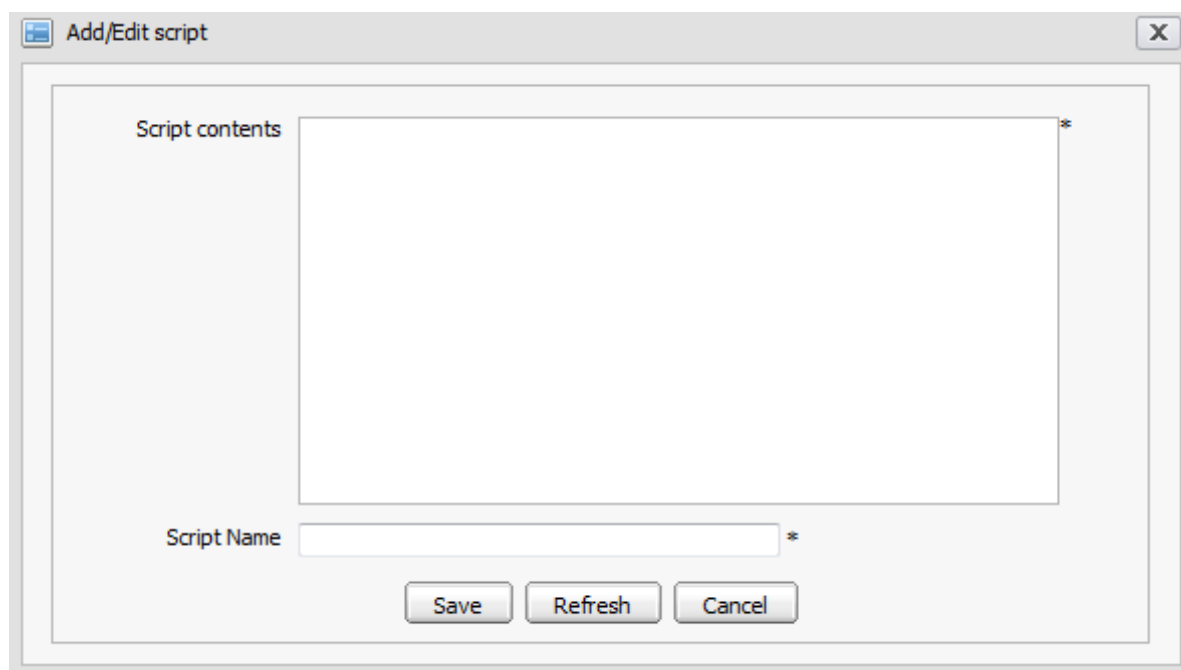2. Click **OK** to accept deleting this action, or **Cancel** to discard this action.

The BC Scripts tab:

Procedure 5.42. Add a BC script

To add a BC script, do as follows:

1. In the **Manage Scripts**, select the **BC Scripts** tab.

2. Click the **Add** button to open the **Add/Edit script** form:

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

4. Input a script name into the **Name** field.

5. Click **Save** to finish adding the new script.

Procedure 5.43. Editing a BC script

To edit a BC script, do as follows:

1. In the **BC** **Script** tab, click

    on a script that you want to edit.

    The **Add/Edit script** form will appear:

2. Edit the properties that you want.

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

Procedure 5.44. Deleting a BC script

To delete a BC script, do as follows:

1. In the **BC** **Scripts** tab, click

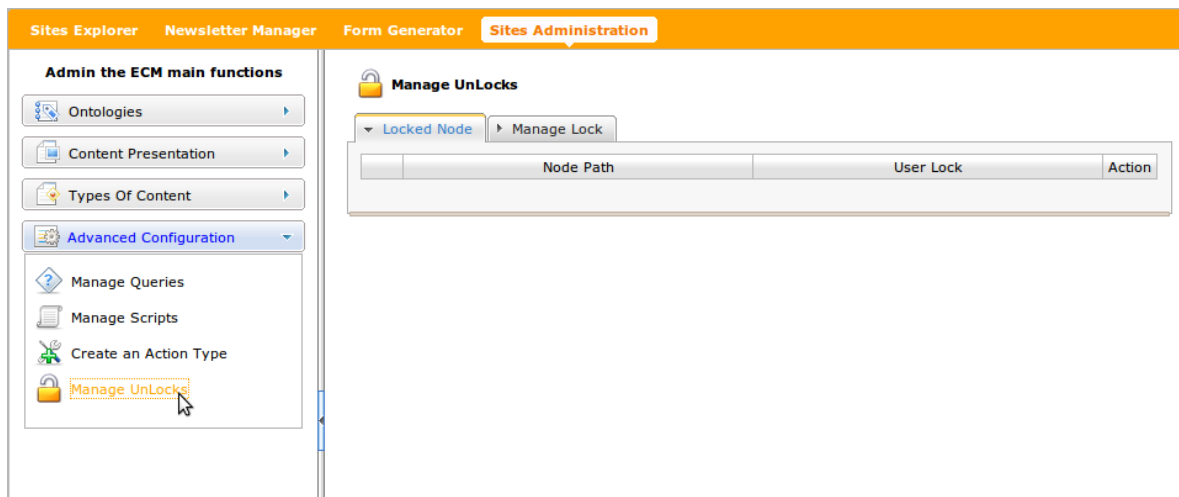   on the script you want to delete. A confirmation message appears.

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

5.3.4.3. Manage Unlocks

All locked nodes are listed and managed by administrators in the **WCM** Administration. There are two ways that help administrators unlock nodes: unlock nodes in the right click menu in Site Explorer or unlock nodes in the **WCM** Administration.

Procedure 5.45. Unlock Nodes

1. Go to **Sites Administration** on the navigation bar.

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

3. In the **Locked Node** tab on the right panel, administrators can unlock nodes by clicking
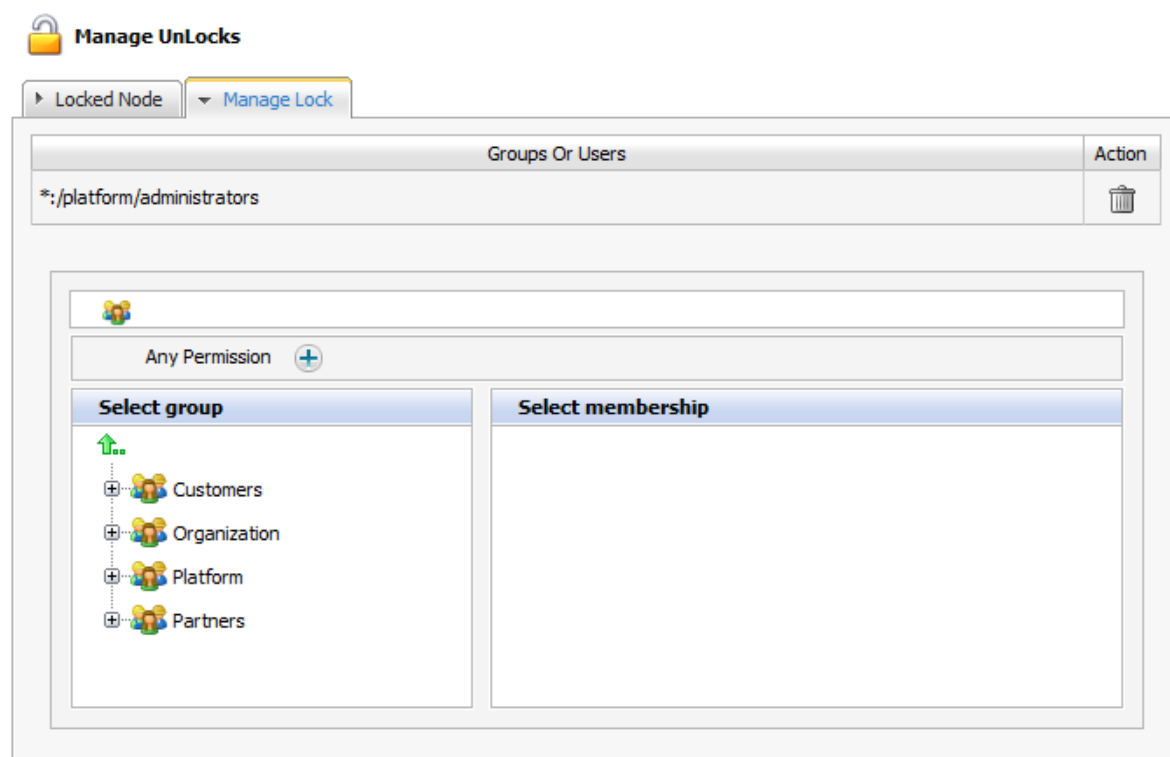

    that corresponds to nodes which need to be unlocked. The unlocked nodes will disappear from the locked node list.

    Administrators can manage and add the unlock permission for another group and users in the **Manage Lock** tab.

4. Select the group on the **Select group** panel and the corresponding membership on the **Select membership**panel. The selected group will be lisetd in the **Group and Users** column. However, administrators can also click the

    if they want to allow any users to unlock nodes.

5. In case administrators want to remove the unlock permission of groups, click the

that corresponds to the group in order to remove them form the Unlock permission list except the group `*:/platform/administrator` and `root`.

5.3.4.4. Creating Action Types

This function allows managing of all action nodes in the **WCM** system.

Procedure 5.46. Create an Action Type

1. Go to the **WCM Administration** on the navigation bar.

2. Select **Advanced Configuration | Create an Action Type**.

3. Click the **Add** button to open the **Action Type Form** form:
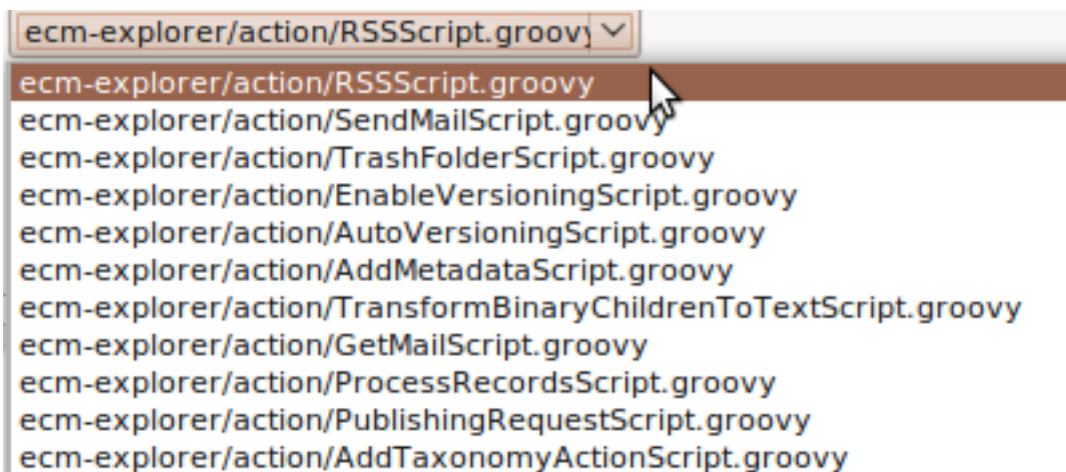
4. Select the action type.

5. Input a name for the action.

6. Check/uncheck the "**is Action Move**" option: the action will have exo:move property or not.

7. Select an execute for the **Execute** field.

8. The **Variables** field: allows creating multi-values for action. If you want to add more values for action click

.   Click

to delete a value.

9. Click *Save* to accept adding a new action type.

Next Steps

This user guide has provided a thorough explanation of features and terminologies within eXo Content. Now that you know how to create, manage and publish web content and administer a website based on eXo Content, you may have more questions or want to get involved in the eXo community. The following links can connect you with resources to learn more and contribute to the open source development process.

- *Learn more about eXo Platform 3.0* [http://www.exoplatform.com/company/public/website/platform]

- *Video demos, tutorial and more in the eXo Resource Center* [http://www.exoplatform.com/company/public/website/resource-center]

- *Access another eXo documents in the eXo Wiki* [http://wiki.exoplatform.com/xwiki/bin/view/Main/WebHome/]

- *Ask question about eXo Content in the Forums* [http://forums.exoplatform.org/portal/public/classic/forum]

Appendix A. Revision History

Revision History

Revision 1-2.1.1	Fri Nov 19 2010	ScottMumford<smumford@redhat.com>

Updated docbook source to WCM 2.1.1

Revision 1-2.0	Mon Oct 25 2010	ScottMumford<smumford@redhat.com>, LauraBailey, TomWells, EslpethThorne, RebeccaNewton, JaredMorgan

Completed docbook conversion.

Revision 1-0	Tue Sep 28 2010	ScottMumford<smumford@redhat.com>

Initial creation of book by publican