

## **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)

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Preface .....	v
<b>1. Preamble</b> .....	1
1.1. Overview .....	1
1.2. Why Use Site Publisher .....	1
1.3. About This Document .....	3
1.4. References and Related Sources .....	4
<b>2. Overall Introduction</b> .....	7
2.1. eXo Content .....	7
2.2. Site Content Structure .....	7
2.3. Web Content .....	9
2.3.1. Web Content .....	9
2.3.2. Web Content Structure .....	9
2.4. Terminologies .....	9
2.4.1. Repository .....	9
2.4.2. Workspace .....	9
2.4.3. Drive .....	10
2.4.4. Node .....	10
2.4.5. Version .....	10
2.4.6. WebDAV .....	11
2.4.7. Podcast .....	11
2.4.8. File Plan .....	12
2.4.9. Symlink .....	12
<b>3. Get Started</b> .....	13
3.1. Account .....	13
3.1.1. Register an account .....	13
3.1.2. Sign In .....	15
3.1.3. Sign Out .....	17
3.1.4. Retrieve user name/password .....	18
3.1.5. Change Account Information .....	19
3.2. Change The Display Language .....	21
3.3. Change the skin of the current site .....	22
<b>4. Basic Actions</b> .....	25
4.1. View a site .....	25
4.2. Print a Web Content .....	26
4.3. Contribute Content .....	26
4.3.1. Edit Mode .....	26
4.3.2. InContext Editing .....	28
4.3.3. Publication Process .....	39
4.4. Content Inside Categories .....	41
4.4.1. What is a Category in eXo Content? .....	41
4.4.2. Create a Content .....	42
4.5. Dynamic Navigation .....	43
4.6. Content Explorer .....	46
4.6.1. Access Content Explorer .....	46

4.6.2. Drives .....	48
4.6.3. Views .....	52
4.6.4. Actions .....	58
4.6.5. Manage Content In Content Explorer .....	137
4.6.6. Actions on Folders and Documents .....	142
4.7. Manage Site Content with WebDAV .....	161
4.7.1. What is WebDAV .....	161
4.7.2. Why use WebDAV? .....	162
4.7.3. How to Use WebDAV With eXo Content .....	162
4.7.4. Actions .....	168
4.8. Search in Content Explorer .....	170
4.8.1. Simple Search .....	170
4.8.2. Advanced Search .....	171
4.8.3. Quick Search .....	184
4.9. Preferences .....	185
4.10. Newsletters .....	186
4.10.1. Newsletter Viewer .....	187
4.10.2. Manage Newsletters .....	189
4.11. Fast Content Creator .....	204
4.11.1. Edit Mode .....	205
4.12. Form Builder .....	208
4.13. Category Navigation .....	211
4.13.1. The Edit Modes of Category Navigation Portlet .....	212
<b>5. Advanced Actions .....</b>	<b>217</b>
5.1. Set Up a Website .....	217
5.1.1. Create a new site .....	217
5.1.2. Edit a Site .....	222
5.1.3. Switch between sites .....	233
5.1.4. Delete a site .....	233
5.2. Manage Site Resources in one place .....	234
5.2.1. CSS Folder .....	235
5.2.2. Document Folder .....	235
5.2.3. JS Folder .....	236
5.2.4. Links Folder .....	236
5.2.5. Media Folder .....	236
5.2.6. Web Content Folders .....	236
5.3. Administration page .....	238
5.3.1. Categories and Tags .....	238
5.3.2. Content Presentation Manager .....	249
5.3.3. Content Types .....	274
5.3.4. Advanced Configuration .....	280
<b>6. Next Steps .....</b>	<b>293</b>
A. Revision History .....	295

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## Preface

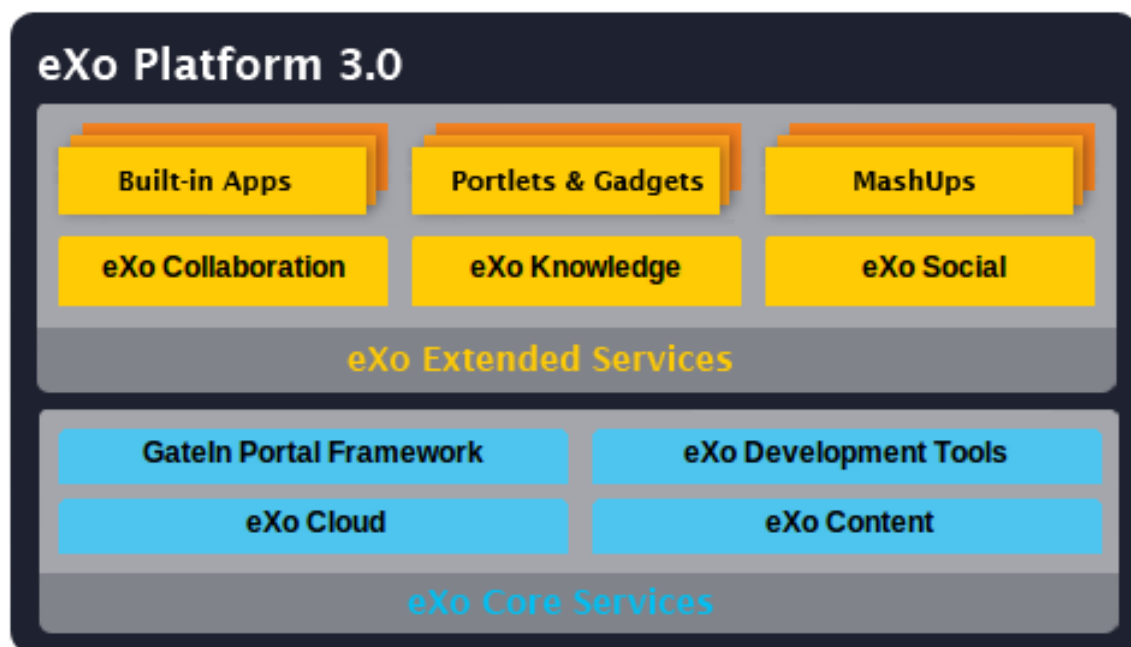


# Preamble

## 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 and build content-rich websites such as CSS, Java Script and RSS support, advanced document management tool, collaboration tools, etc. All features are to meet your requirements for the purpose of easy site management, cost reduction in managing multiple sites in only one place.

## 1.3. About This Document

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

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

With 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/) [http://www.exoplatform.com/]
- [eXo Wiki](http://wiki.exoplatform.com/xwiki/bin/view/Main/WebHome/) [http://wiki.exoplatform.com/xwiki/bin/view/Main/WebHome/]

### Support

- [Forums](http://forums.exoplatform.org/) [http://forums.exoplatform.org/]
- [FAQs](http://faq.exoplatform.org/index.html) [http://faq.exoplatform.org/index.html]

### Downloads

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

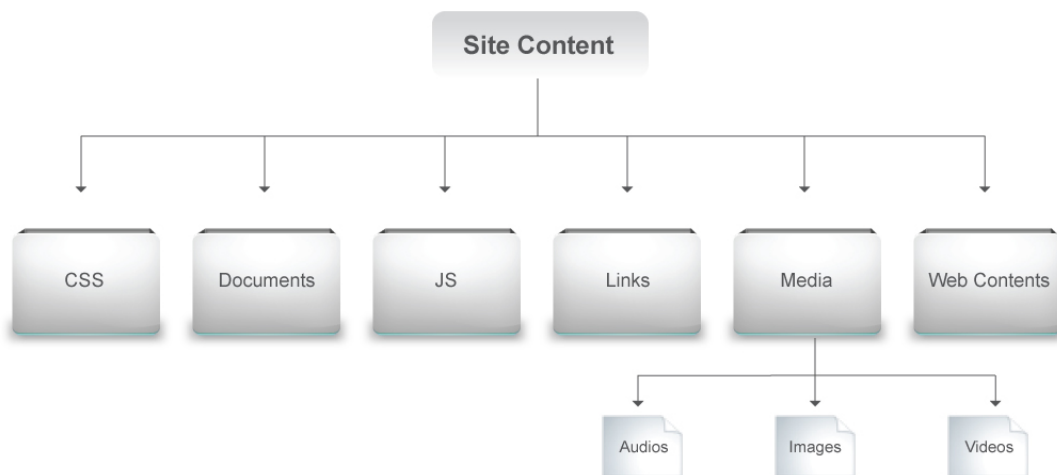
The WCM users can manage both structured and unstructured content, so that an organization, such as a business or governmental agency, can more effectively meet business goals (increasing the profits or improve the organizational process with efficient use of budgets), serve its customers (as a competitive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

## 2.2. Site Content Structure

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



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

### Details:

#### CSS

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

#### Documents:

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

#### JS

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

#### Links:

This folder stores all links used in the site.

#### Media:

This folder includes three sub folders:

##### Audios:

Store all sound files used in a site.

##### images:

Store all images, pictures used in a site.

##### videos:

Store all video files used in a site.

#### Web content:

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

## 2.3. Web Content

### 2.3.1. Web Content

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

### 2.3.2. Web Content Structure

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

Main content:

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

Illustration:

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

default.css:

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

default.js:

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

## 2.4. Terminologies

### 2.4.1. Repository

A repository is a place where contents are stored and maintained. The content repository is:

- A place where contents are stored.
- A place where digital data are stored.
- Accessible to the user without having to travel across a network.

### 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 our case, the content repository consists of more than one workspace. The “repository” repository contains multiple workspaces, including : 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. This workspace is mostly used when using the Workflow based content publication lifecycle.

Collaboration workspace:

Allows users to validate and manage documents. This is the central place to store and edit contents and media.

### 2.4.3. Drive

A drive can be understood as a shortcut in the content repository. It enables administrators to limit visibility of each workspace for groups of users. It's also a simple way to hide the complexity of the content storage by showing only the structure that makes sense for Business users.

More specifically, a drive 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.

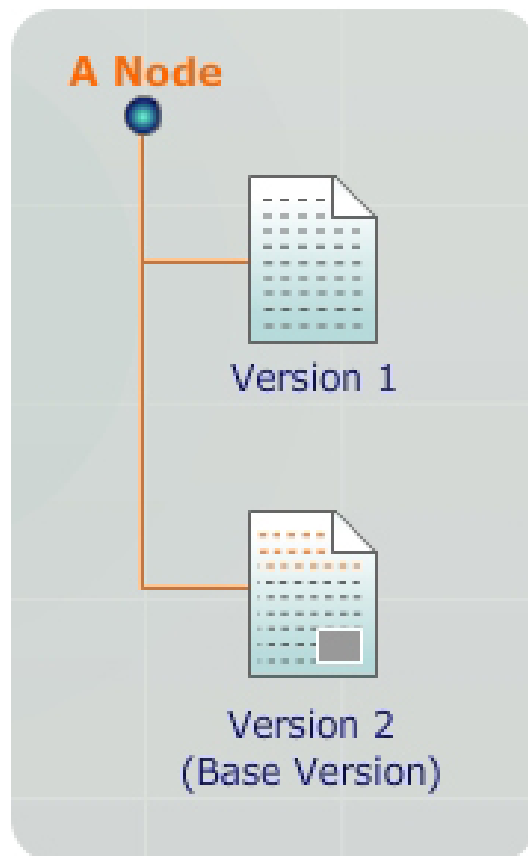
### 2.4.4. Node

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 by 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.

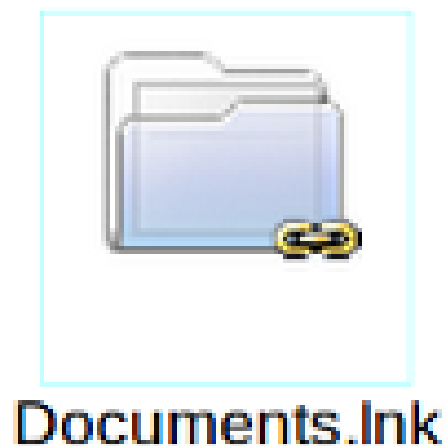
### 2.4.8. File Plan

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 Content Explorer, a symlink has a small chain symbol next to its icon:



# Get Started

## 3.1. Account

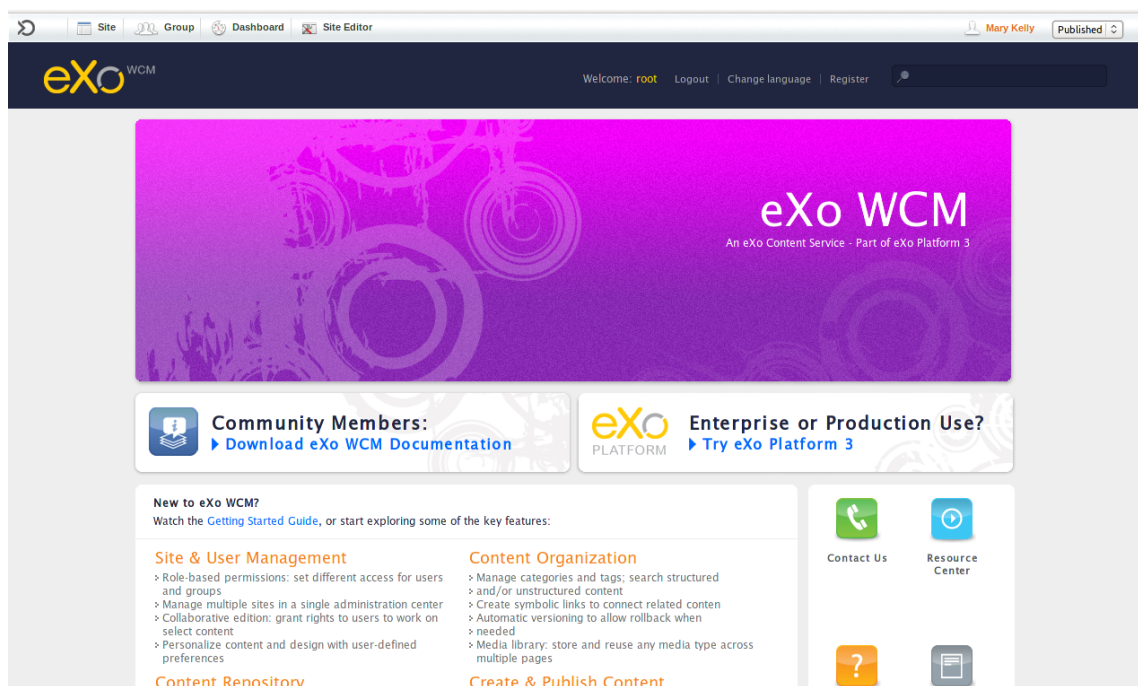
### 3.1.1. Register an account

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:

Account Setting

User Profile

User Name:

\*



Password:

\*

Confirm Password:

\*

First Name:

\*

Last Name:

\*

Email Address:

\*

Save

Reset

(\*) 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: <code>username@abc.com</code>

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.

Account Setting User Profile

Given Name:

Family Name:

Nick Name:

Birthday:

Gender: Male

Employer:

Department:

Job Title:

Language: English

Personal Info

Profile

Home Info

Business Info

Save Reset

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.



### Email

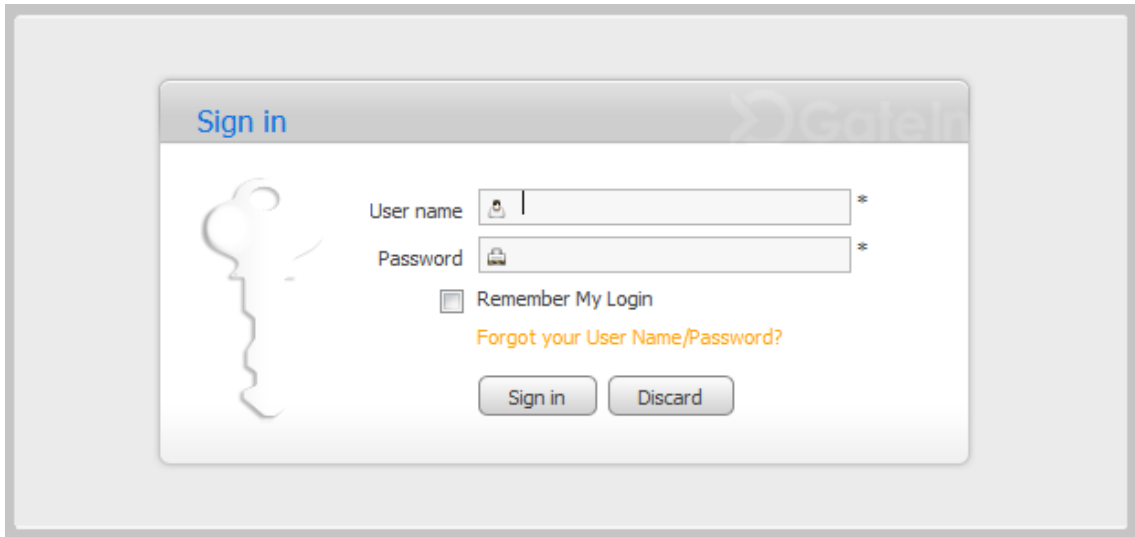
You should enter your email address exactly because when you forget username or password, you can recover it by using this email address.

## 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:

A screenshot of a web application's sign-in form. The form is titled "Sign in" in blue text. It features a stylized white key icon on the left. To the right of the icon are two input fields: "User name" and "Password", each with a small icon (a person for the user name, a key for the password) and a red asterisk indicating a required field. Below these fields is a checkbox labeled "Remember My Login". Underneath the checkbox is a link that says "Forgot your User Name/Password?". At the bottom of the form are two buttons: "Sign in" and "Discard". The entire form is set against a light gray background with a subtle "Gale" logo in the top right corner.

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.

Site Group Dashboard

Welcome: mary Logout | Change language | Register

Mary Kelly Live

## Acme Corp

Overview News Newsletters Contact Us

**Welcome to Acme Corp**  
Welcome to our site

**DOCUMENTS**

- Conditions and Requirements**  
Lorem dolor sit ipsum amet  
consectetur adipiscing elit  
28/08/2009
- How to join us**  
Consectetur adipiscing elit lorem27/08/2009  
ipsum dolor sit amet
- Where we are**  
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**LATEST NEWS**

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- ACME News 2**  
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- ACME News 4**  
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**COMPANY NEWS**

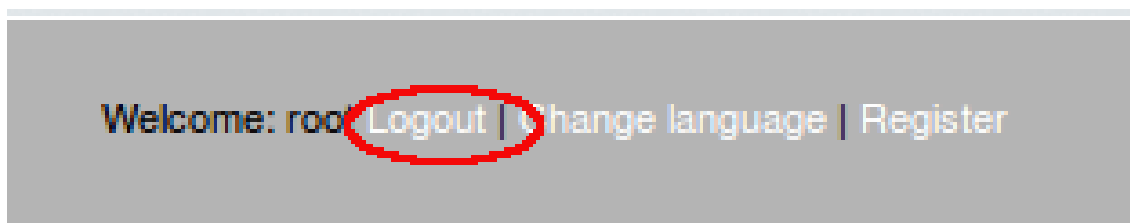
- ACME News 1**  
Aug 21, 2009 3:55:11 AM by Root Root  
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[Read more](#)
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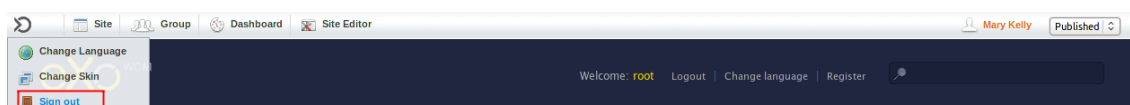
### 3.1.3. Sign Out

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:



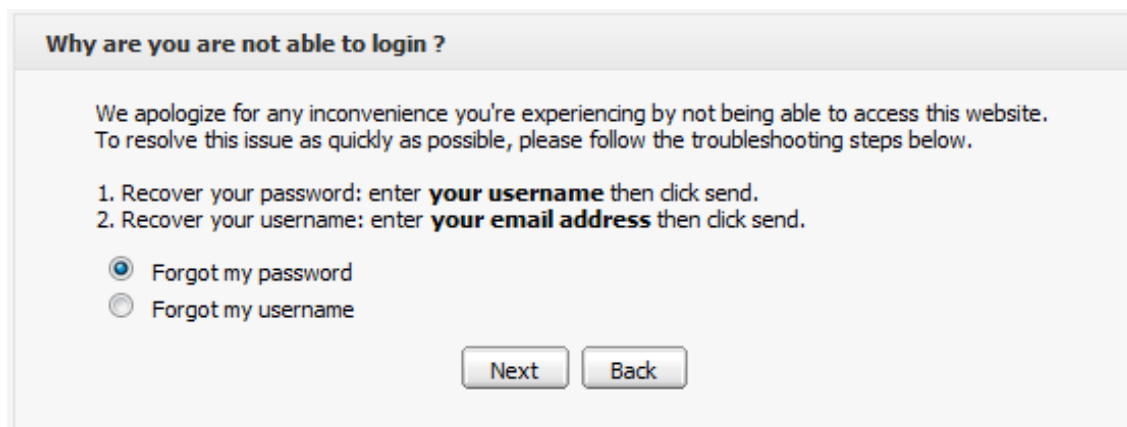
### 3.1.4. Retrieve user name/password

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:



The screenshot shows a web form titled "Why are you are not able to login ?". The form contains an apology message: "We apologize for any inconvenience you're experiencing by not being able to access this website. To resolve this issue as quickly as possible, please follow the troubleshooting steps below." Below the message are two numbered instructions: "1. Recover your password: enter **your username** then click send." and "2. Recover your username: enter **your email address** then click send." There are two radio buttons: "Forgot my password" (which is selected) and "Forgot my username". At the bottom of the form are two buttons: "Next" and "Back".

Forgot my password:

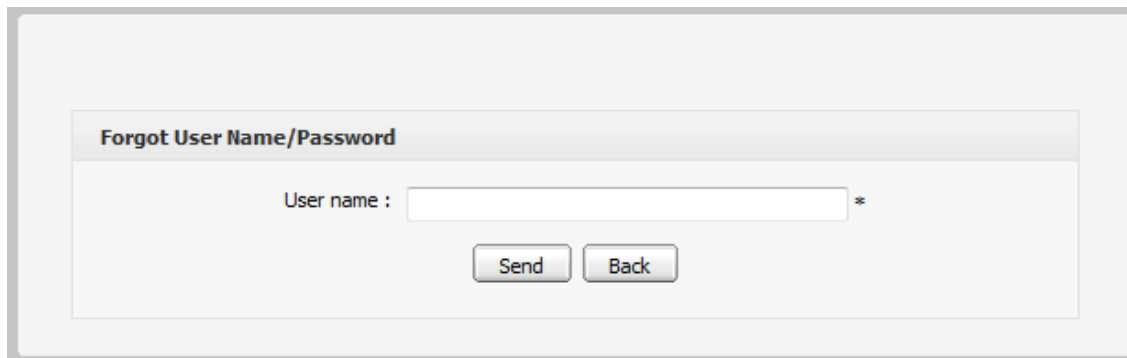
If you forgot your password, you need to select this option.

Forgot my username:

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

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

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



The screenshot shows a web form titled "Forgot User Name/Password". The form contains a single input field labeled "User name :". To the right of the input field is an asterisk (\*). Below the input field are two buttons: "Send" and "Back".

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

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.

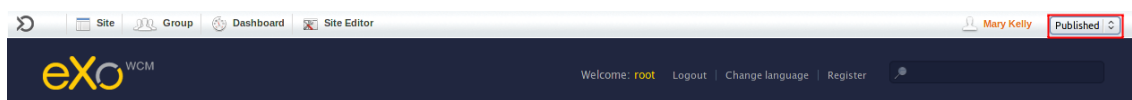
- If you forget User Name: when a username is retrieved, your old username is restored and can be reused and a new password is also sent to your email with the old username.
- If you forget old password: a new password will be set (as temporary, then you will be directed to change the password for the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

### 3.1.5. Change Account Information

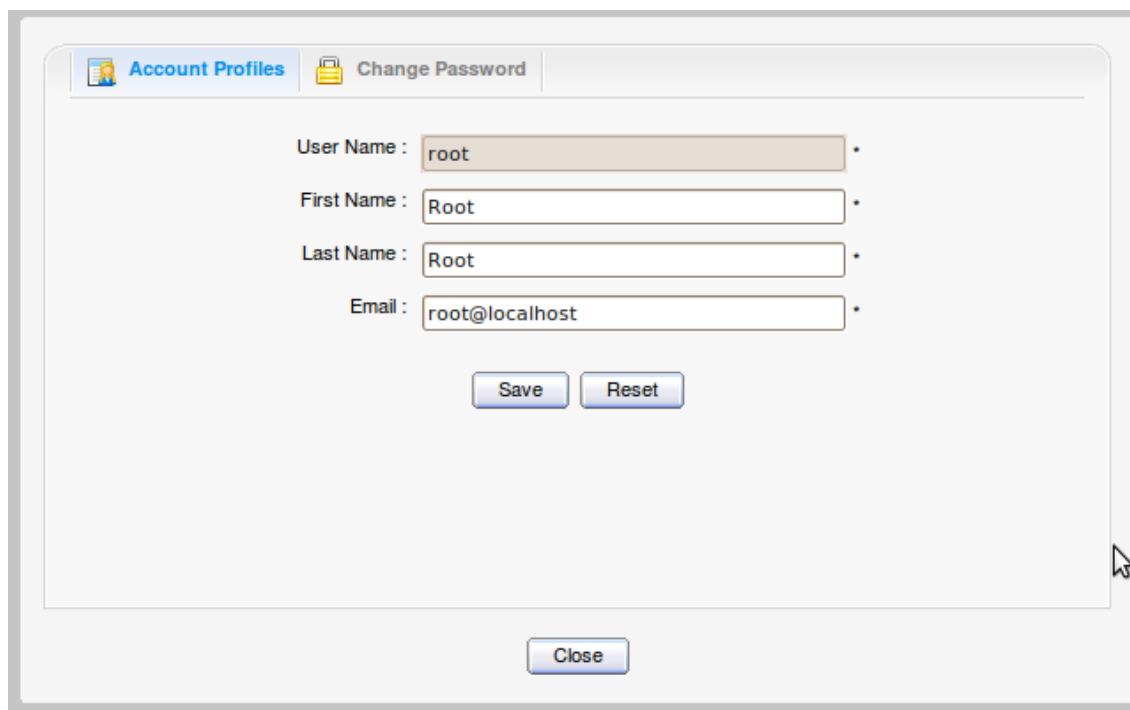
The function enables you change your account information, such as your profile and password.

#### Procedure 3.4.

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



The Account Profiles tab will appear:



The screenshot shows a dialog box titled "Account Profiles" with a "Change Password" tab. The "Account Profiles" tab is active, displaying four text input fields: "User Name" (containing "root"), "First Name" (containing "Root"), "Last Name" (containing "Root"), and "Email" (containing "root@localhost"). Each field has a small asterisk to its right. Below the fields are two buttons: "Save" and "Reset". At the bottom center of the dialog is a "Close" button. A mouse cursor is visible on the right side of the dialog.

### 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

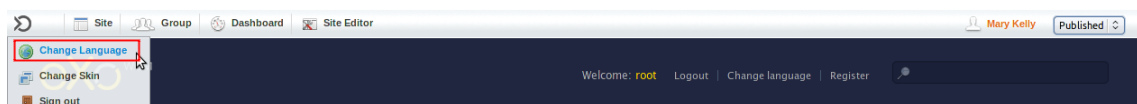
The priority order of display language is shown to the following order:

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

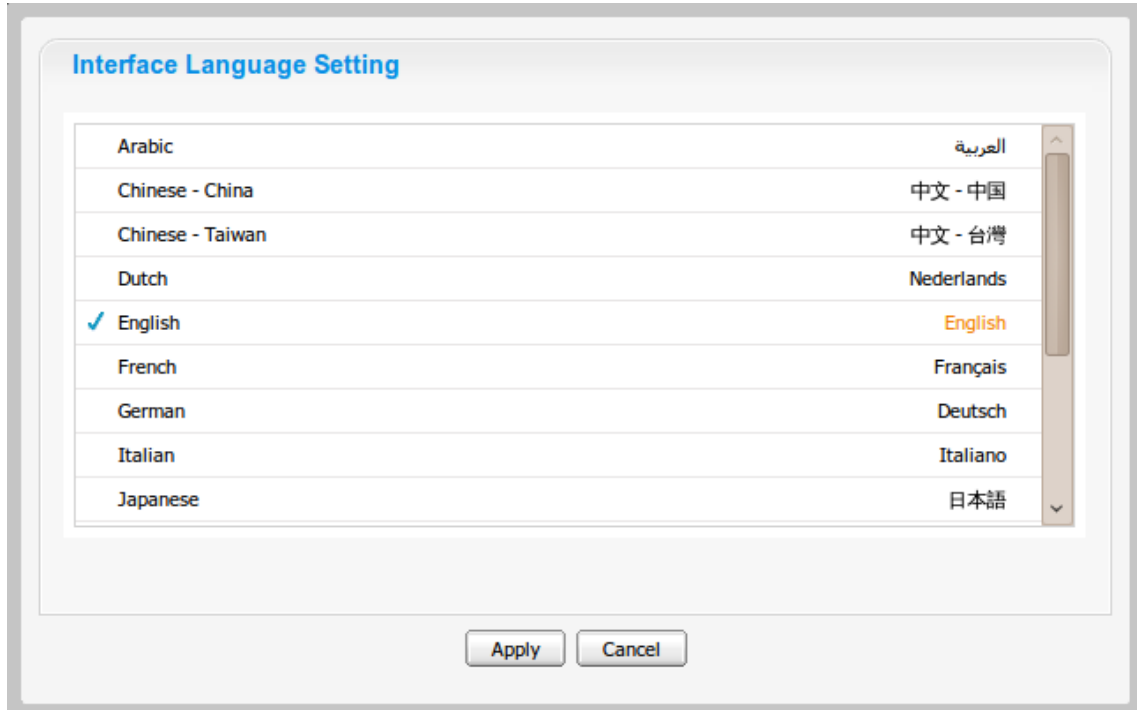
Thus, to display your preferred language, you should pay attention to this order to change the language type appropriately.

### 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:



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

Language	Native Name
Arabic	العربية
Chinese - China	中文 - 中国
Chinese - Taiwan	中文 - 台灣
Dutch	Nederlands
✓ English	English
French	Français
German	Deutsch
Italian	Italiano
Japanese	日本語

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

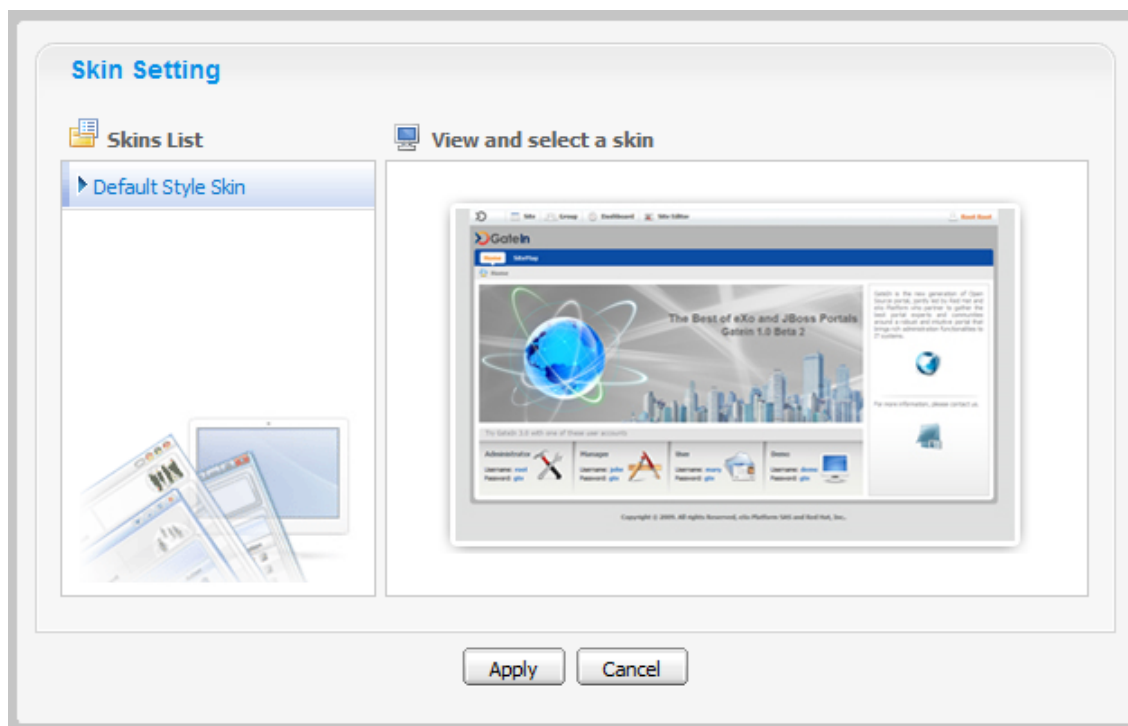
The eXo skins are attractive user interface styles for displaying a portal. Each skin has its own characteristics with different backgrounds, icons, and more. To use the portal easily and effectively, you are allowed to change the skin of the current site.

#### 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.

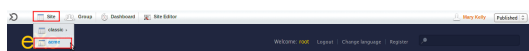


# Basic Actions

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 Administration bar which contains administration functions related to portals (websites).
- 2 Banner which contains slogan, logo, icon used in the website.

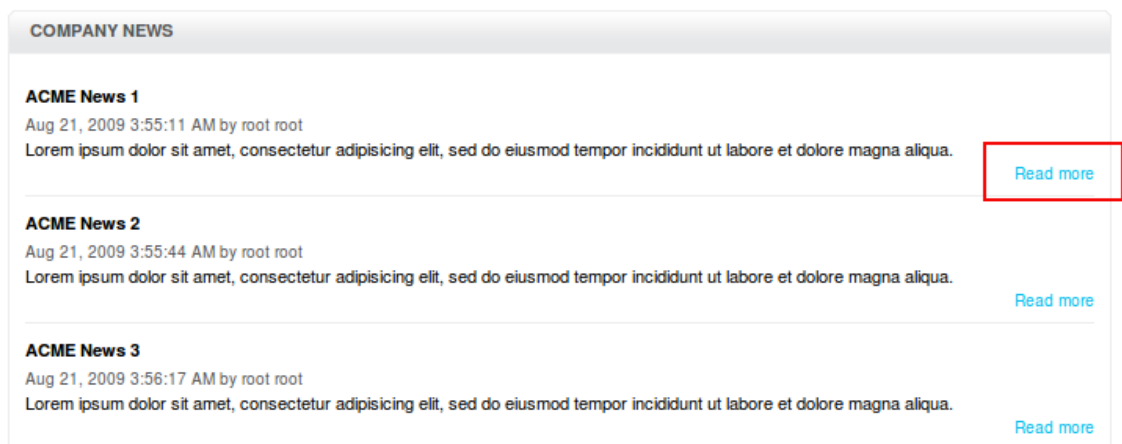
- ③ Navigation bar which helps users to visualize the structure of the website and provide quick links to different pages.
- ④ Home page which is the main page of the website. This is the default page that is displayed first when you visit the website.
- ⑤ Footer of the web site. It can be texts, or 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

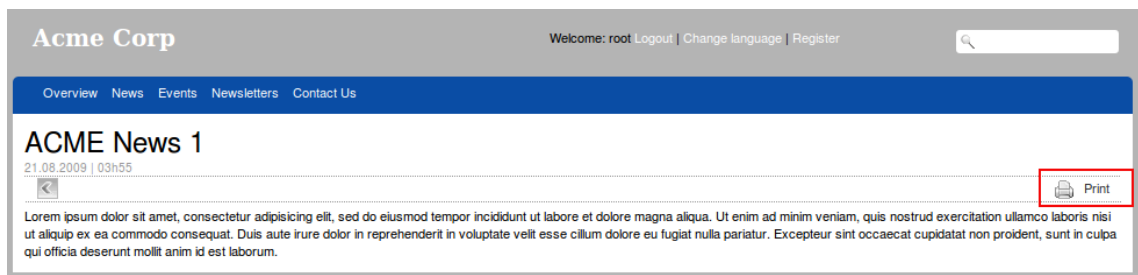
Users can easily print any content in a site by following these steps:

### 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.

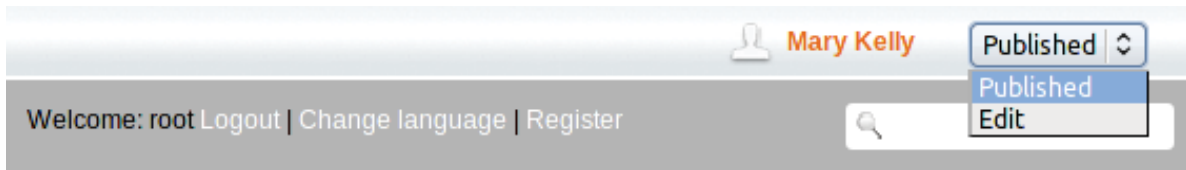


3. Click **Print** to print the content of this page or **Close** to close this tab without printing.

## 4.3. Contribute Content

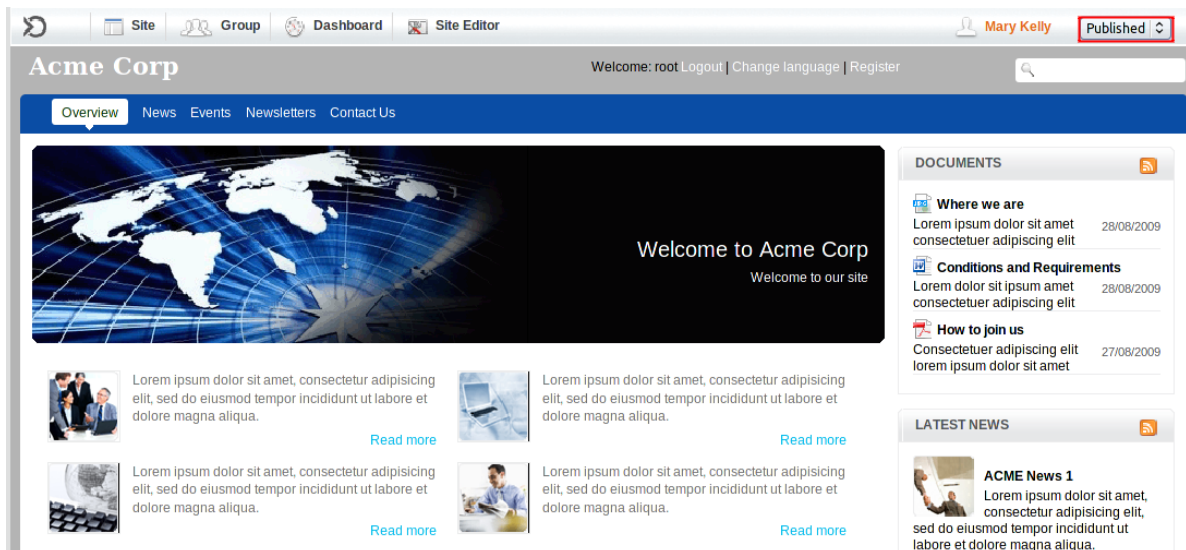
### 4.3.1. Edit Mode

A site in eXo Content has two modes (Published mode and Edit mode) which is specific for editing site and viewing site. You can easily switch between these modes by selecting in the drop-down list at the top left corner.



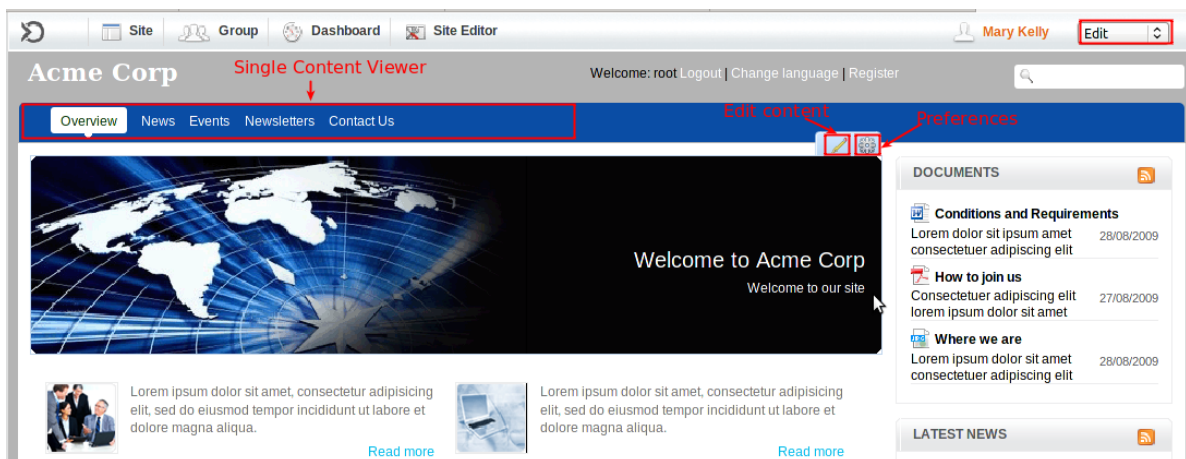
- **Edit mode:** In this mode, you can edit all contents of the current site. When hovering the mouse over contents, you can see edit icons which enable you to quickly edit these contents. You can take advantage of this feature to submit contents to a page.
- **Published mode:** In this mode, you only can view the current site without editing the contents of the site.

When you login to a site, by default, the page is in the published mode, you cannot see any quick edit icon and cannot edit site contents at this time:

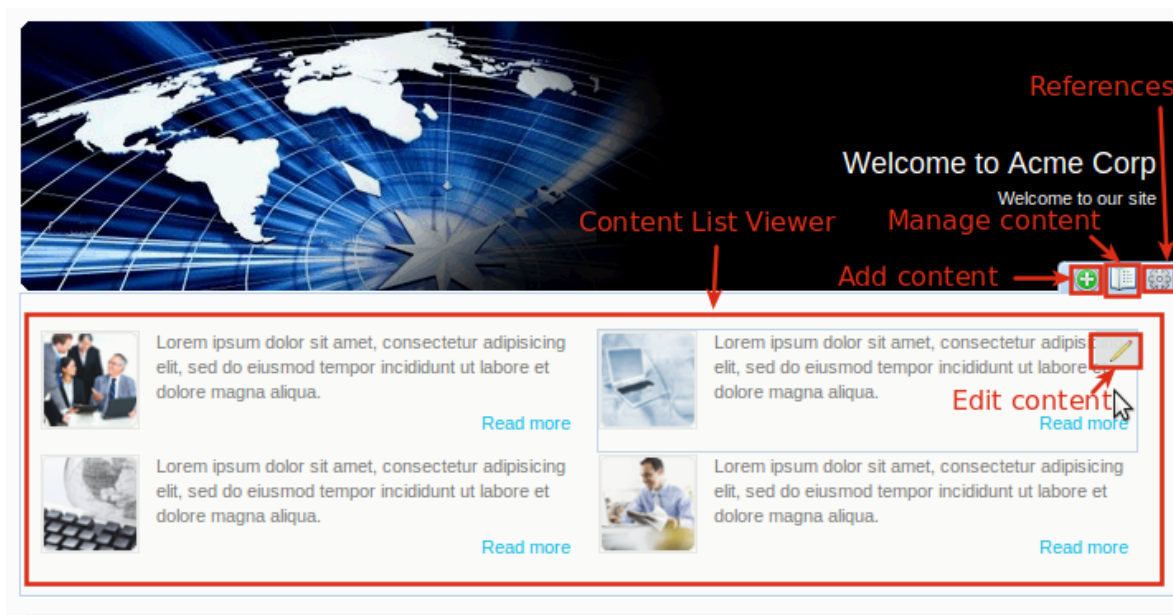


When a page is switched to the Edit mode, you can see quick edit icons on the site contents when mousing over them.

For single content viewer (SCV), you can see the current state of the content, the Edit Content icon and References icon.



For content list viewer (CLV), you can see the current state of the content, the Edit Content, References icon, the Add Content icon and the Management Content icon.



### 4.3.2. InContext Editing

**InContext Editing** allows you to edit content "in context" rather than having a WYSIWYG editor pop-up over the top of the page. This feature makes page editing a much more user intuitive process, with the new content automatically taking on the previous contents.

To use **InContext Editing**, turn on the **Edit Mode**.

#### 4.3.2.1. Add Content


Adding a new content by InContext Editing is enabled for the content list viewer.

Do the following:

#### Procedure 4.2. Add a new content

1. Turn on the **Edit Mode** > hover the mouse to the CLV that you want to add a new content in.
2. Click the **Add Content** icon on the CLV.

You will be redirected to the **Content Explorer** with a new document form for you to write a document.













Select Template   ← Select a template

Title























Name
























Language

Summary

 Source
  **B**
 *I*
 U






 Size
 



Content

 Source
 





















 **B**
 *I*
 U





















Last modified date : Aug 21, 2009 3:58:13 AM

Click to save →

3.  Click  to open the template list and select one .
4. Fulfill all the fields in the form. See the part [Section 4.6.4.2, "Add a document"](#) to know how to add types of document.
5. Click **Save as Draft** to save the document in a folder of the Collaboration drive or **Close** to quit the form without creating the document.



### Note

Saving a document in which folder of the Collaboration drive depends on the path you choose in [Section 4.3.2.4, “Preferences”](#).

### 4.3.2.2. Edit Content

You can edit any contents on the homepage for SCV and CLV with InContext Editing. For CLV, you only can edit each content in it.

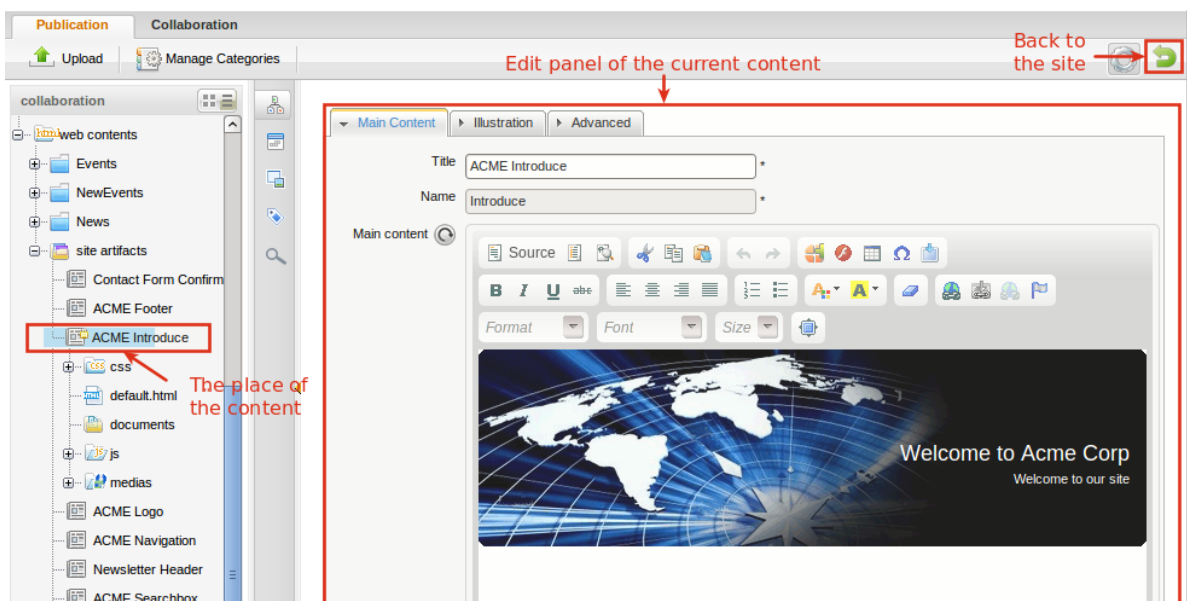
Do the following:

#### Procedure 4.3. Edit a content

1. Turn on the **Edit Mode** > Hover the mouse to the content you want to edit.
2. Click



on the right corner of the content you want to edit. You will be redirected to the **Content Explorer** with the document form for you to edit.



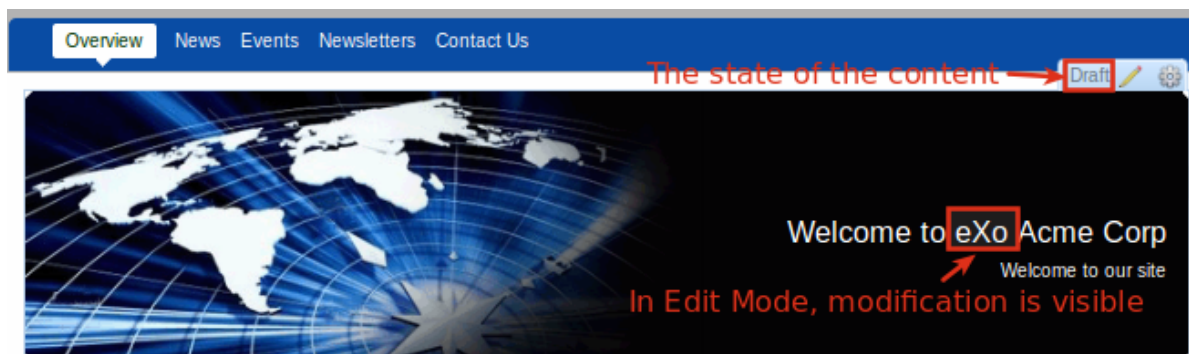
3. Edit the content > Click **Save as Draft** to save the content or **Close** to quit the form.



4. Click



to return to the site and in the **Edit Mode**, the content in the state "draft" with its modification is visible.





### Note

When you turn on the Published Mode, you cannot see the edited content. To see it in the Published Mode, you must publish it. See [Section 4.3.3, “Publication Process”](#) to know how to publish a content.

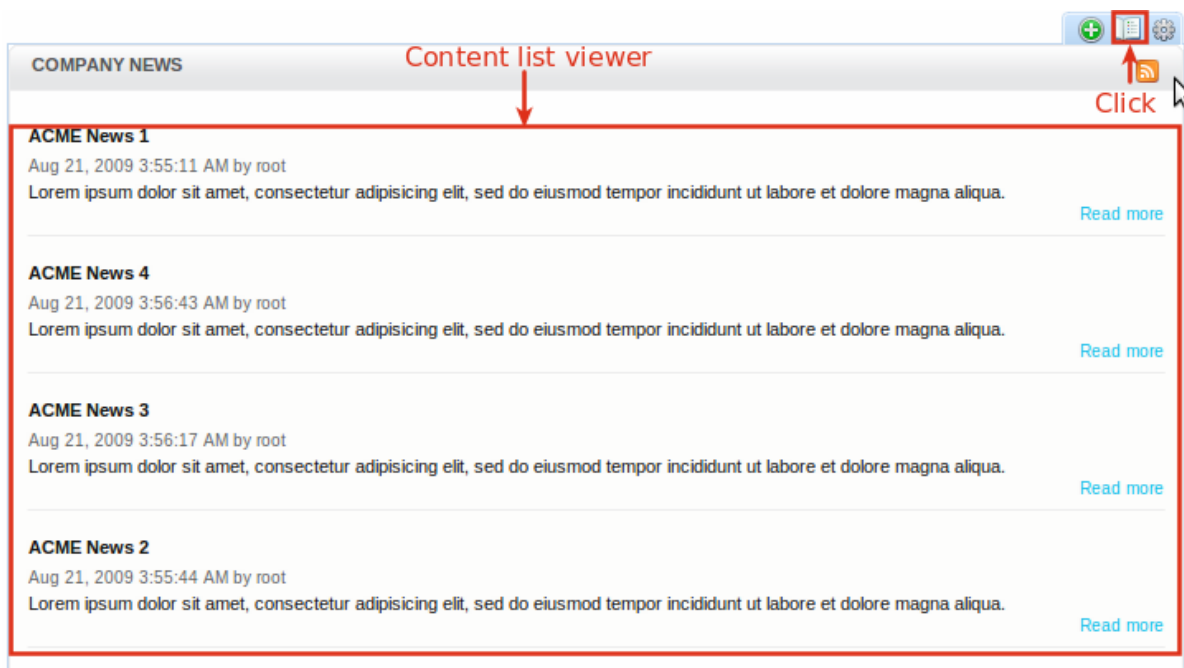
### 4.3.2.3. Manage Content

With InContext Editing, you can easily manage a content list on the homepage. You can add a new content in the list.

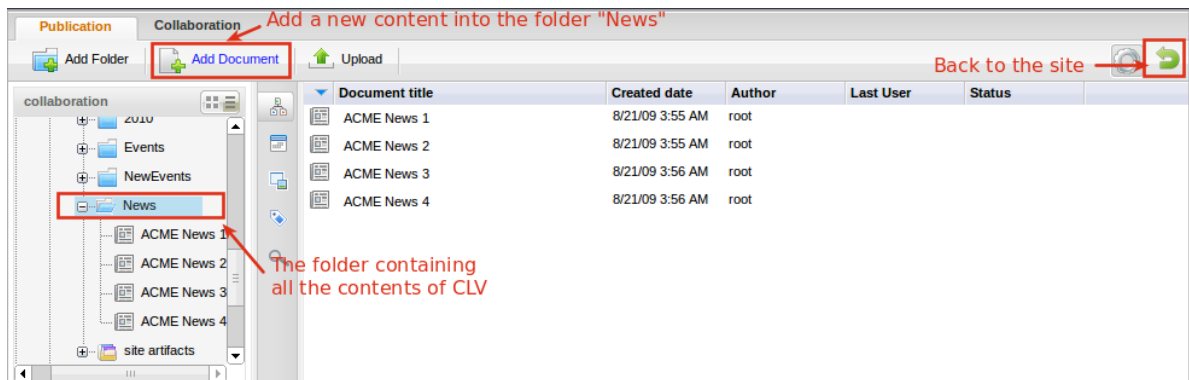
Do the following:

### Procedure 4.4. Manage Content

1. Turn on the **Edit Mode** > the **Manage Content** icon of the content list viewer that you want to manage on the homepage.



The browser will redirect to **Content Explorer**:



2. Click **Add Document** on the action bar to add a new content to the folder containing all the contents in the content list viewer.
3. The form to add a new content appears. Do the same steps as the part [Section 4.3.2.1, "Add Content"](#).

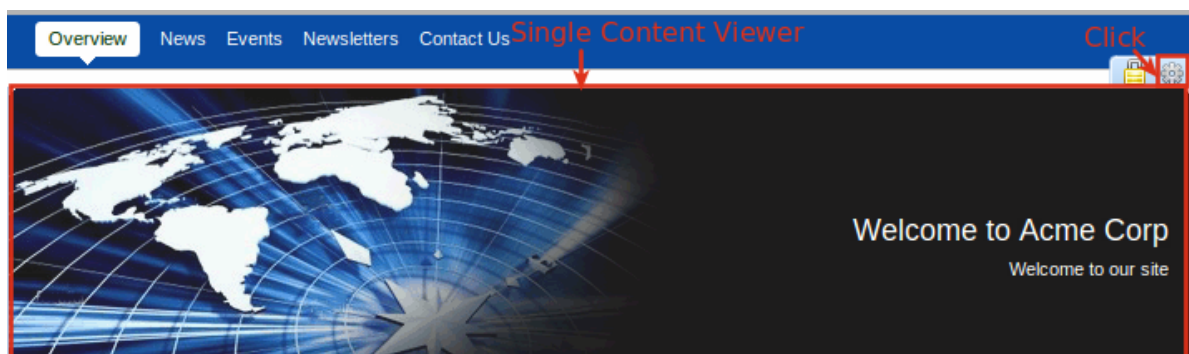
#### 4.3.2.4. Preferences

Preferences enable you to edit contents in the single content viewer (SCV) and the content list viewer (CLV), reset the display of the contents in SCV and CLV and publish contents.

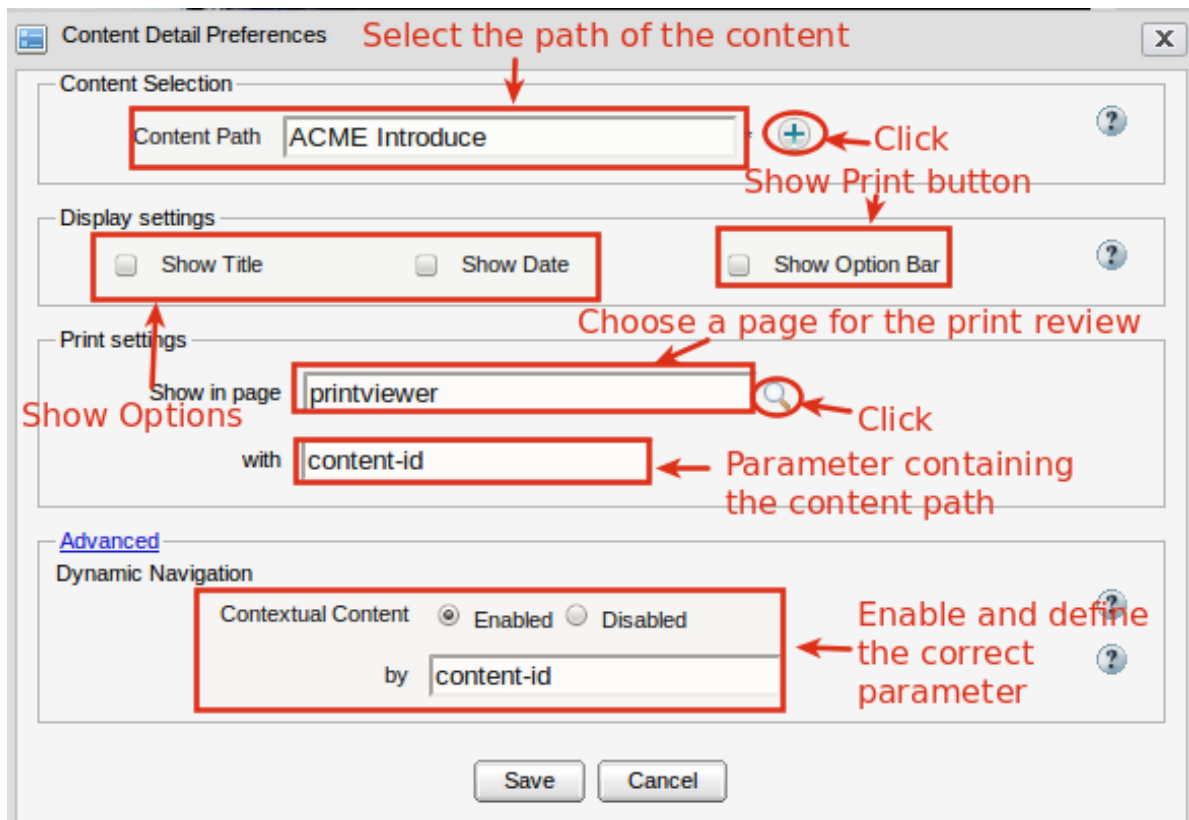
**Content Detail Preferences.** To edit the single content viewer do the following:

#### Procedure 4.5. Edit Content Detail Viewer

1. Turn on the **Edit Mode** > Select the **Preferences** icon of a single content viewer.



The Content Detail Preferences dialog appears:



Details:

**Content Selection:** Select the path of the content that you want to show by clicking



**Display Settings:** Allow configuring Title, Date and OptionBar visibility.

- **Show Title:** Specify whether the title of the content is displayed or not.
- **Show Date:** Specify whether the date of the content publication is displayed or not.
- **Show Option Bar:** Show or hide the Option bar used to show the print link.

**Print Setting:**

- **Show in page:** The content is shown the page.
- **with:** Parameters contains the content path.

**Advanced** panel: When clicking on this link, the Advanced panel will be shown. If **Contextual Content** property is "Disable", the Advanced panel is closed by default. The content should enable "dynamic navigation" that interprets the URL and shows a content.

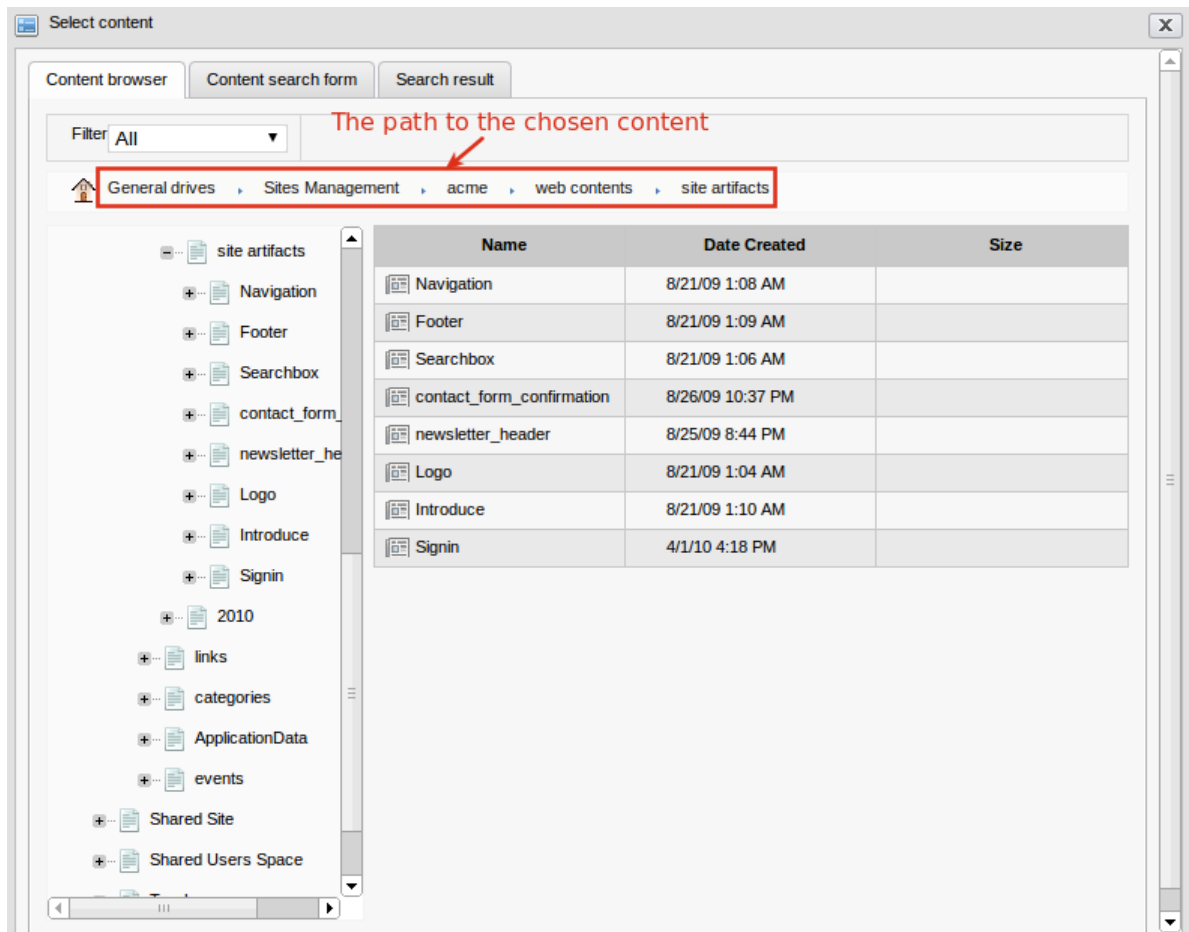


## Note



to see a quick help panel for each section.

- Click the plus icon next to the **Content Path** to re-select another content. The Select Content dialog appears: selectcontent



- Choose a folder on the left panel and a content in the folder on the right panel. The content chosen will be displayed in the **Content Path** field.
- Tick in the **Show Title** box, the **Show Date** and the **Show Option bar** box if you want to display the title of the content, the date of the content publication and the print button like the illustration below:

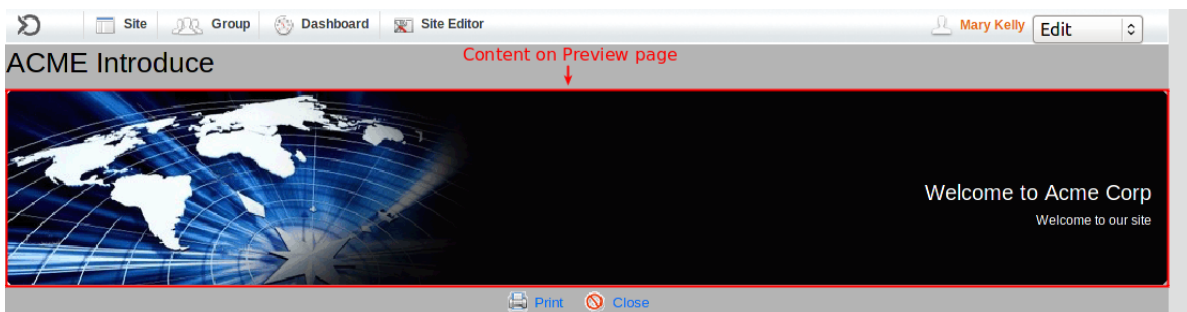


5. In the **Print** **Setting** part, click



and the **UIPageselector** dialog appears, you will see **Printviewer**.

Click the **Print** button, the content is opened in the print viewer page.



**URL:** <http://localhost:8080/ecmdemo/private/acme/printviewer?content-id=/repository/collaboration/sites%20content/live/acme/web%20contents/site%20artifacts/Introduce&isPrint=true>

In which:

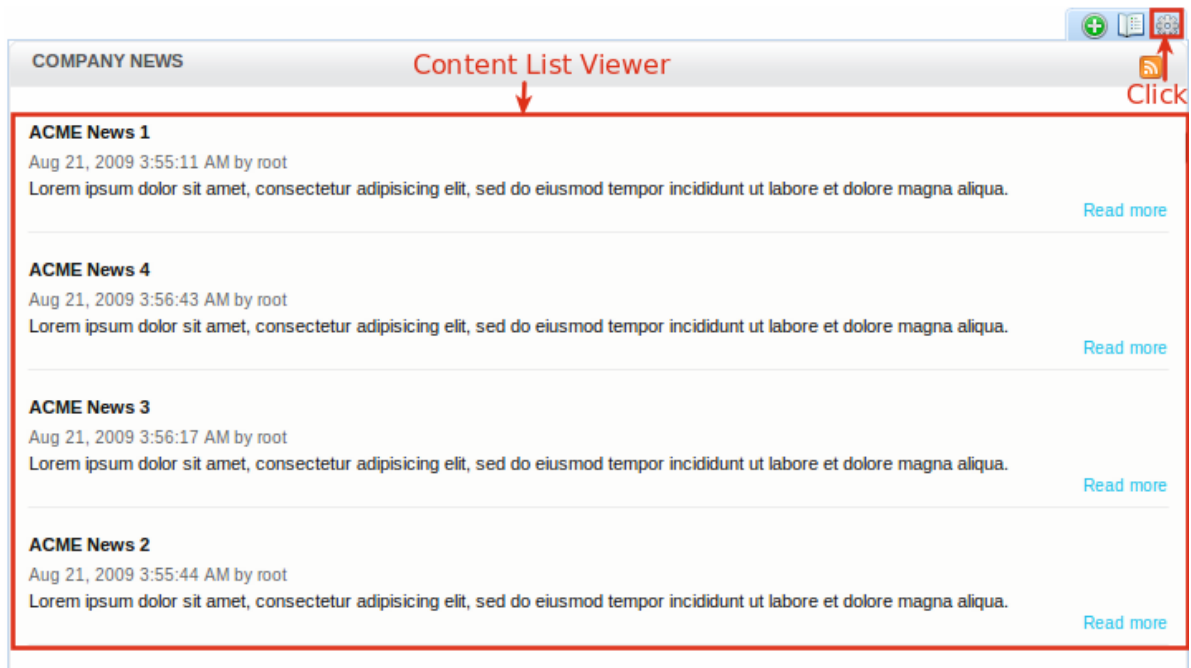
- **printviewer?**: the print viewer page of the content.
- **content-id**: the parameter containing the content path.

6. Click **Save** to save all the changes or **Cancel** to quit the dialog without any changes.

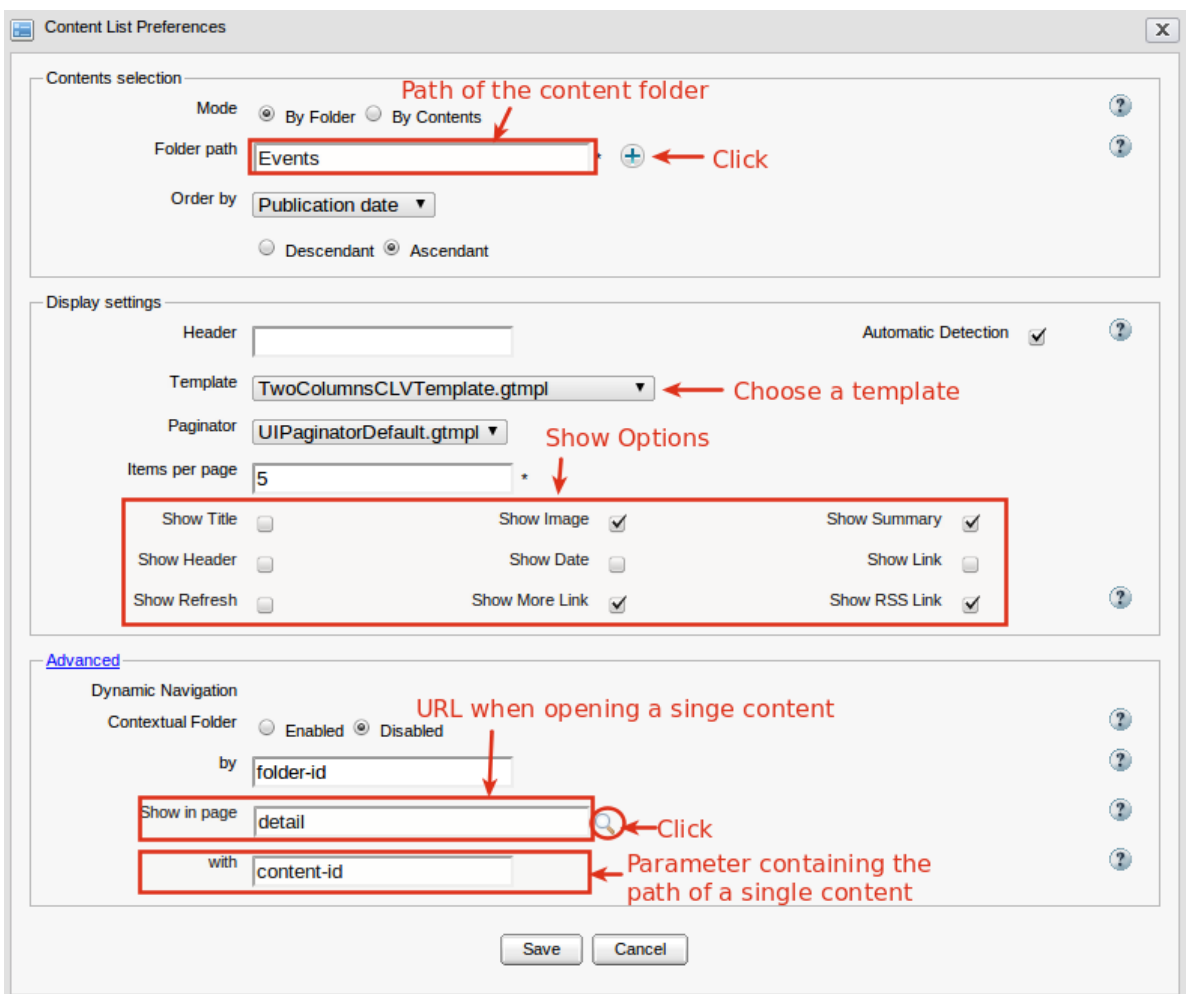
**Content List Preferences.** To edit the single content viewer do the following

### Procedure 4.6. Edit Content List Viewer

1. Turn on the **Edit Mode** > Select the **Preferences** icon of a content list viewer.



The Content List Preferences dialog appears:



Details:

**Table 4.1.**

<b>Mode</b>	<p>This mode is to select web content for list viewer. There are two modes:</p> <p>By Folder: This mode allows you to select a content folder in the Folder path field.</p> <p>By Content: This mode allows you to select by the content in a specific folder in Folder path field.</p>
<b>Folder path</b>	The path to a location of a folder that contains the content.
<b>Order by</b>	The field is selected to sort content in the list viewer. You can sort content by Title, Date created or Date modified in ascending or descending order.
<b>Header</b>	The title for all content that are listed in List Viewer.
<b>Viewer template</b>	The template is used to view content list.
<b>Paginator template</b>	The template is used to view each content in list.
<b>Items per page</b>	The number of items will be displayed per page.
<b>Show image</b>	The option is to show or hide the illustration of each published web content/document.
<b>Show summary</b>	The option is to show or hide the summary of each web content/document.
<b>Show header</b>	The option is whether to show a header or not.
<b>Show refresh button</b>	The option is whether to show the refresh button at the left bottom of this page or not.
<b>Show title</b>	The option is to show or hide title of each published web content and/or document.
<b>Show date created</b>	The option is to show or hide the created date of each published web content/document.
<b>Show link</b>	The option is to show or hide the link of web content 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.

2. Browse the documents/ web content of an available site by clicking



to the **folder path** field.

3. If you select the **By folder** mode, select an available site on the left, then select a folder that contains contents (documents and/or web content) on the right by clicking the folder.

If you select the **By content** mode, select an available folder from the left panel, all content in this folder will be listed on the right panel. Click a content on the right that you want to add to the content list. A message informs that you have successfully added it in List Content. The selected content is listed in List Content.

4. Enter a header for the content list in the Header field if you want.
5. Select a template to display the content list in the template list.
6. Tick/untick some options that you want.
7. Click **Save** to save all the changes or **Cancel** to quit the dialog without any changes.

### 4.3.3. Publication Process

After a new content is created, it is saved as draft and you can easily to publish it on your site. The publication process consists of four steps:

#### **Request approval > Approval > Stage > Publish**

If you do not have the right to approve or publish a content, so when you want to publish your content, you must send your approval request first.

If you have the right to approve or publish a content, you do not need to send a request approval. You can yourself publish it with the **Stage** step immediately.

- **Request approval:** When a new content is created, it must be approved before publishing by clicking **Request Approval** on the action bar of the Content Explorer or clicking **Pending** in the Manage Publication form:

Manage publication

Revision History

Revision travel

Status:

Draft → Pending → Approved → Staged → Published

Scheduled

from  to

Revisions	Date	Author	Status	Action
Revision: travel	Dec 6, 2010 4:26:46 PM	root	Draft[current revision]	

Save Close

- **Approve:** To approve a content, click **Approve** on the action bar of the Content Explorer or click **Approved** in the Manage Publication.
- **Stage:** Stage enables you to publish a content in a period. After selecting the publication schedule for the content, it will be automatically published as the schedule.

To publish content for a stage, click **Stage** > Click **From/ To** to open a mini calendar > Select the date to publish.

To publish your content forever, you should not to set time in the **To** field.

Manage publication

Revision test

Status:

Draft → Pending → Approved → **Staged** → Published

Start date of publication from [ ] to [ ]

End Date of publication

Mini Calendar

Author	Status	Action
john	Staged[current revision]	[ ]

Save Close

- **Publish:** A content will be published when you have completed the **Stage** step.



### Note

You will see a list of draft contents, pending contents (that are waiting to be your approval if you have the approval right) and contents that will be published at the bottom of the Content Explorer. Click them to review, approve or publish.

Draft Contents

Approval-waiting Contents

Publication-waiting content

My Draft Contents (1)

Waiting For My Approval (1)

To Be Published Tomorrow

The number of contents

Travel

No content

## 4.4. Content Inside Categories

You can create new contents in any folders or directly in a CLV with Incontext Editing. However, creating contents inside a category helps you easily and quickly manage and publish them.

### 4.4.1. What is a Category in eXo Content?

Categories are used to sort and organize documents to ease searches when browsing documents online. After creating a document, you should categorize it by adding it into a category. You should

directly create a document in a category, then the document is automatically created a link to it in the category. When you browse the category, it will be possible to find the referenced documents and display them as if they were children of the category node.

Categories are stored in the JCR itself .

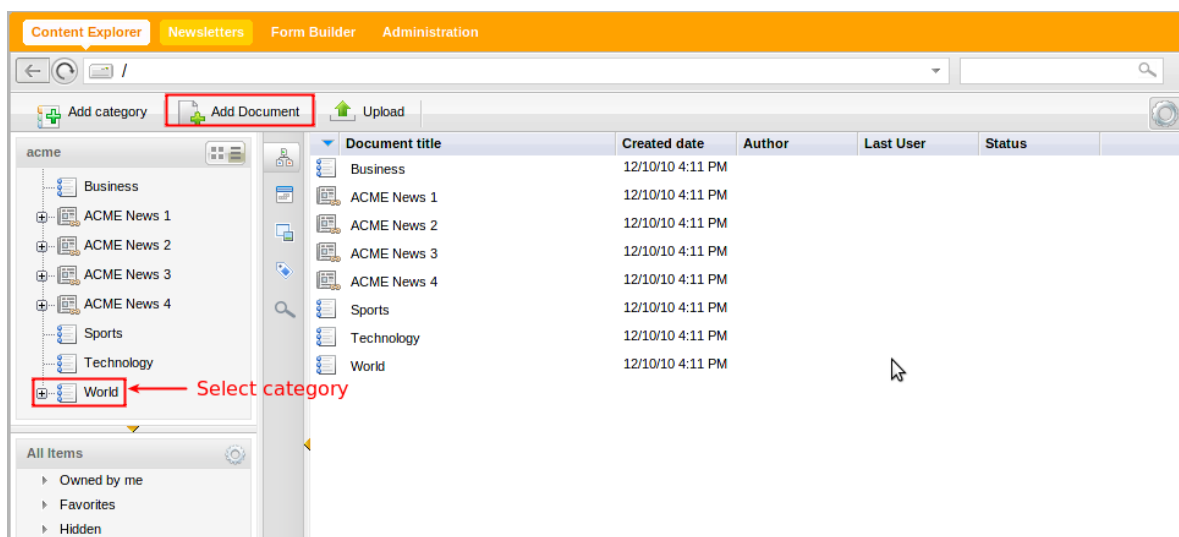
### 4.4.2. Create a Content

This section will show you how to create a content in a category.

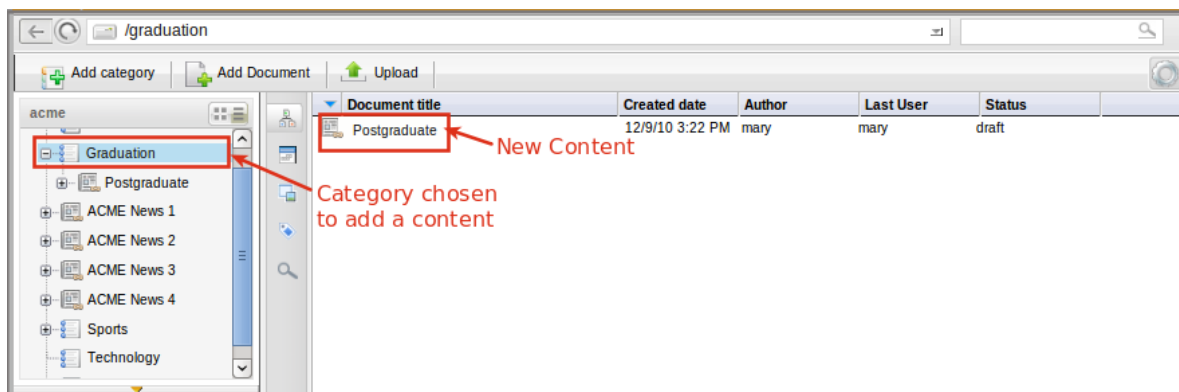
Do the following:

#### Procedure 4.7. Create a content

1. Go to **Group > Content Explorer >** select a category in a drive. For example, select **Acme** drive as the following illustration.



2. Click the **Add Document** button to create a new content. See [Section 4.6.4.2, "Add a document"](#) to know how to add a new content. The new content is a symlink.



Click the symlink to view the content.

## 4.5. Dynamic Navigation

Dynamic Navigation enables you to get a parameter to configure the portlet by URL. It means that the URL containing the content path can be dynamically changed.

This section shows you how to use Dynamic Navigation in eXo Content.

Do the following to access Dynamic Navigation:

### Procedure 4.8. Access Dynamic Navigation

1. Turn on the **Edit Mode** > hover the mouse to SCV or CLV and select the **Preferences** icon.

If you select the Preferences icon of SCV, the Content Detail Preferences form displays.

If you select the Preferences icon of CLV, the Content List Preferences form displays.

2. Click the **Advanced** panel in the Content Detail Preferences form/ the Content List Preferences form.

The Dynamic Navigation will display.

#### Dynamic Navigation in SCV

The screenshot shows the 'Content Detail Preferences' dialog box. It has several sections: 'Content Selection', 'Display settings', 'Print settings', and 'Advanced'. The 'Content Path' field in the 'Content Selection' section is highlighted with a red box and labeled 'The path of the content'. The 'Advanced' section is expanded, showing 'Dynamic Navigation' settings. The 'Contextual Content' is set to 'Enabled'. The 'by' field is highlighted with a red box and labeled 'Parameter containing the content path'. The 'with' field in the 'Print settings' section is labeled 'Dynamic Navigation'. The 'Save' and 'Cancel' buttons are at the bottom.

Details:

**Table 4.2.**

<b>Contextual Content</b>	<ul style="list-style-type: none"><li>• <b>Disable:</b> It means a single content will be opened by an URL containing the Content Path.</li><li>• <b>Enable:</b> This portlet is configured with the provided parameter (content-id by default).</li></ul>
<b>By</b>	This parameter is the key in the URL to let SCV know which really is the path in the current URL. It is editable when Contextual Content is Enable.

For example, open a single content with the Content Path "ACME Introduce". The URL of the content is the following:

URL:   ...    /ecmdemo/private/acme/printviewer?content-id=/repository/collaboration/sites content/live/acme/web contents/site artifacts/Introduce&isPrint=true

### **Dynamic Navigation in CLV**

**Content List Preferences**

**Contents selection**

Mode: ☒ By Folder ☐ By Contents

Folder path:  \* [+](#) ← The Path of the Content Folder

Order by:  [v](#)

☐ Descendant ☒ Ascendant

**Display settings**

Header:

Automatic Detection: ☒

Template:  [v](#)

Paginator:  [v](#)

Items per page:  \*

Show Title: ☐ Show Image: ☒ Show Summary: ☒

Show Header: ☐ Show Date: ☐ Show Link: ☐

Show Refresh: ☐ Show More Link: ☒ Show RSS Link: ☒

**Advanced**

**Dynamic Navigation**

Contextual Folder: ☐ Enabled ☒ Disabled

by:  ← Parameter containing the Folder path

Show in page:  [v](#)

with:  ← Parameter containing the single content path

Details:

**Table 4.3.**

<b>Contextual Folder</b>	<ul style="list-style-type: none"> <li>Disable: It means a single content will be opened by an URL containing the Folder Path (for CLV)</li> <li>Enable: It means the path of content list (Folder Path in the Content Selection path) can be dynamically changed by URL.</li> </ul>
<b>By</b>	This parameter is the key in the URL to let CLV know which really is the path in the current URL.
<b>Show in page</b>	A single content in CLV will be shown in a selected page. You can choose any page but you should take one with a Content Detail

	Portlet. The Content Detail Portlet should enable “dynamic navigation” that interprets the URL and shows a single content.
With	This parameter is the key in the URL to let SCV know which really is the path in the current URL.

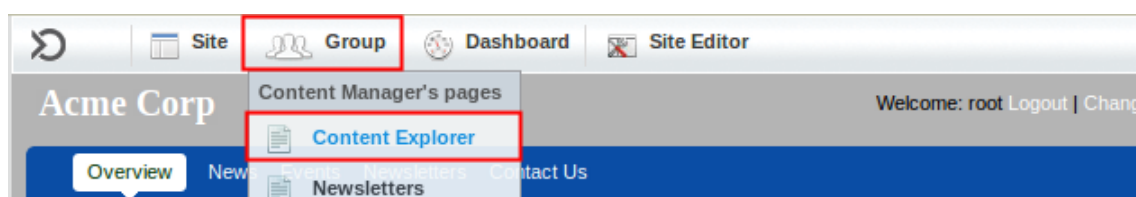
## 4.6. Content Explorer

### 4.6.1. Access Content Explorer

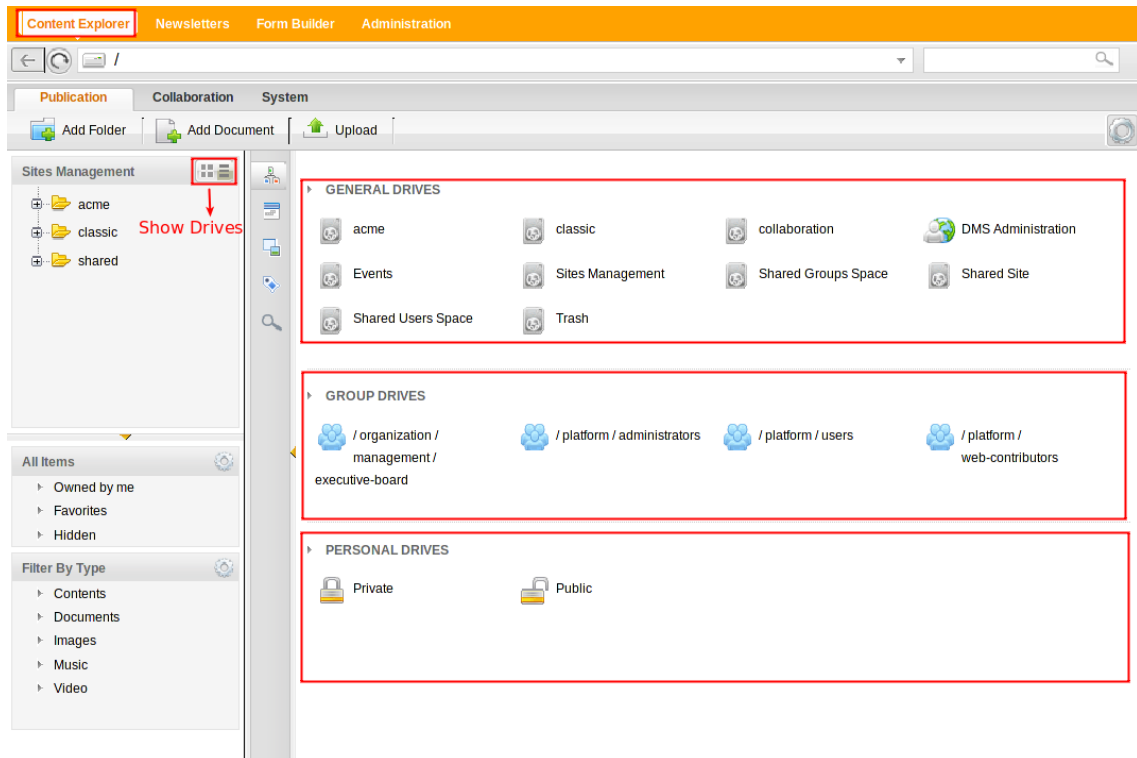
This page is used to manage all documents in different drives. This is really the flexible way because you can do through the Internet anytime and anywhere. By default, anyone can access Content Explorer but the performing actions on Content Explorer depending on the role of each user.

#### Procedure 4.9.

- Go to **Group > Content Explorer** on the administration bar:



A list of all drives organized in groups: Personal drives, Group drives and General drives in the Content Explorer displays:



#### 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

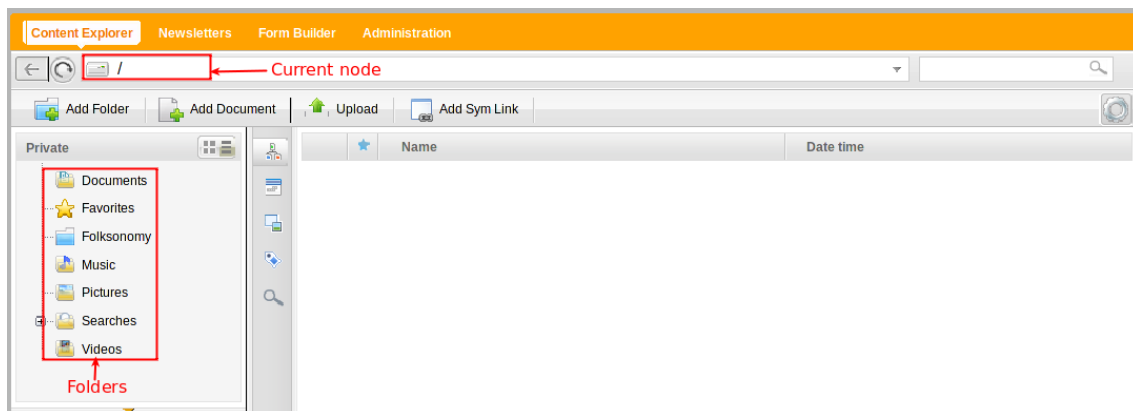
General drives:

This is the working space for everyone but your access right in different drives depends on your role. If you access as administrator role, you can see all drives; otherwise, if you access as web contributor role, you can see some drives only.

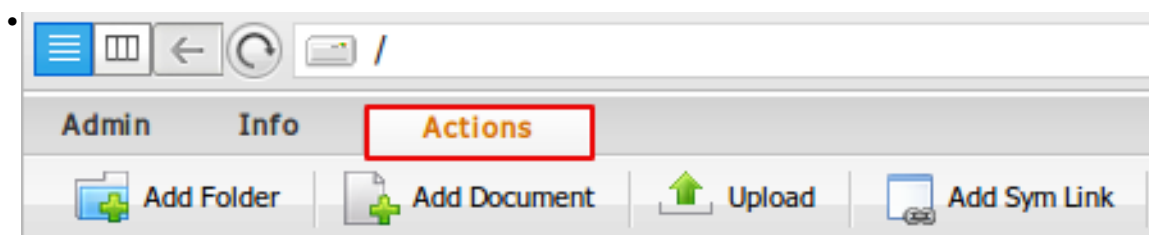
## 4.6.2. Drives

### 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.



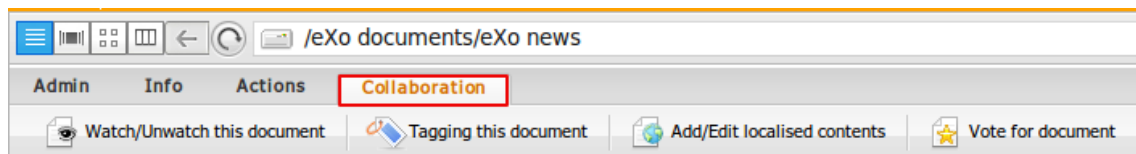
By default, there are some initialized folders to store private user's resources.



By selecting the Actions tab, you can:

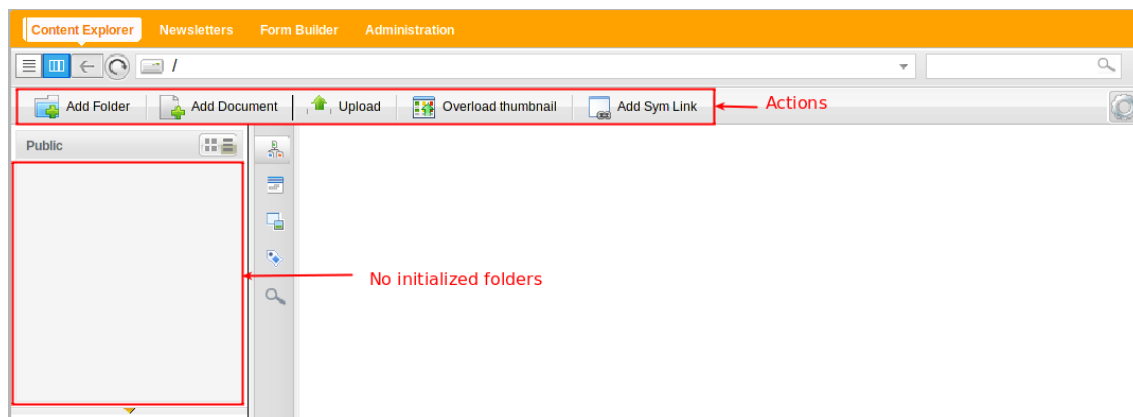
- Create a new folder
- Create a new document
- Upload file from your computer
- Add Sym Links

- 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

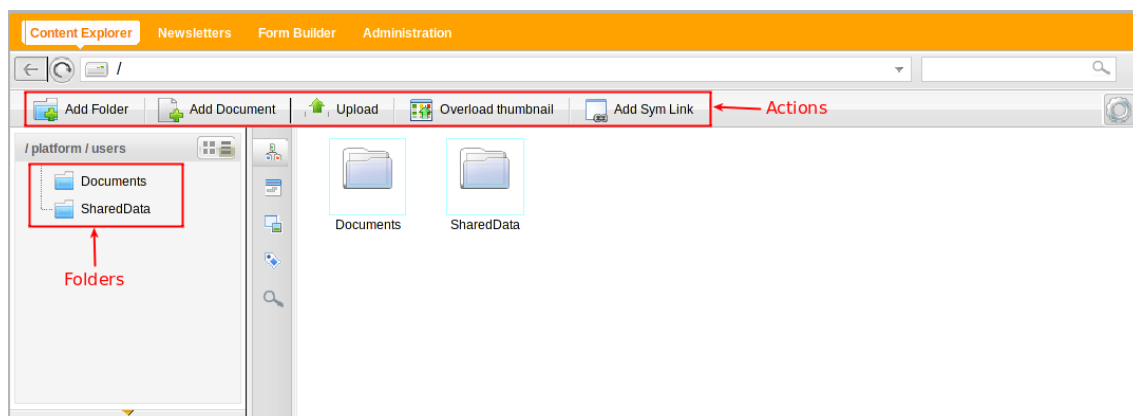


With the Public drive, there is no initialized folder but you can create by yourself.

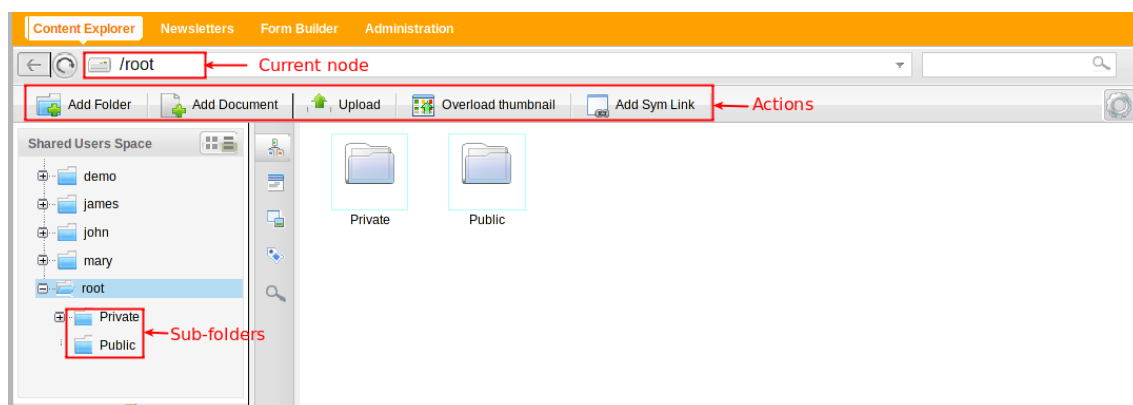
In the Public drive, you also can take actions like in the Private drive.

### 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 existing users, each user has a folder named with his username, that includes two sub folders (private and public). You can see both your private and public folders here but you only can see the public folder of other users.

- 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 cannot:
  - 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 folders/documents in a folder named by your username (e.g, you cannot add a folder/document in the folder "root"), but you can do in its child nodes "public" and "private".
  - 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.

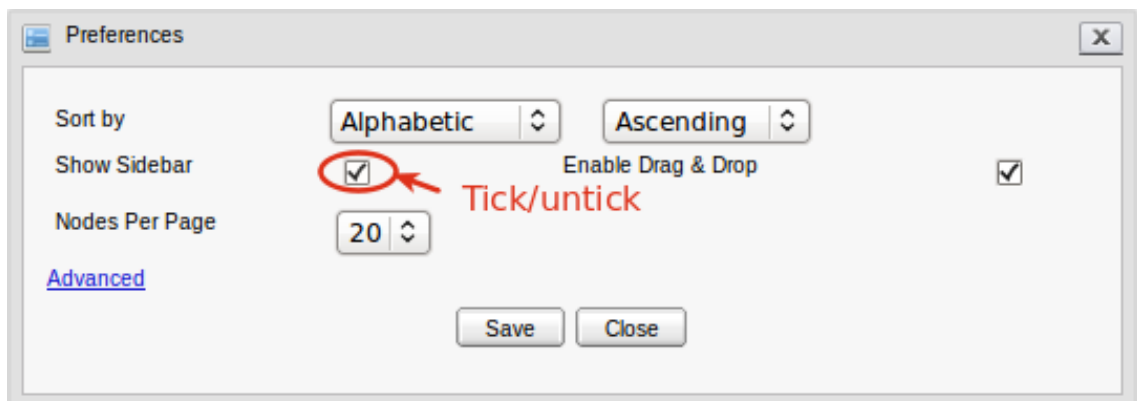
You can show/hide the side bar in two ways:

##### 1. Procedure 4.10. Method 1

1. Click

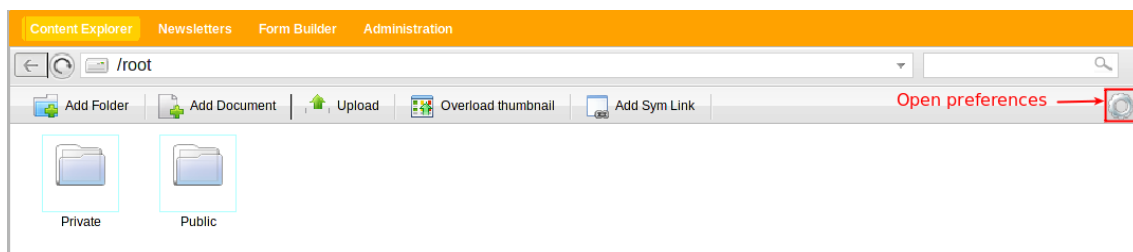


to open the **Preferences**:



2. Untick the **Show sidebar** check box > **Save**.

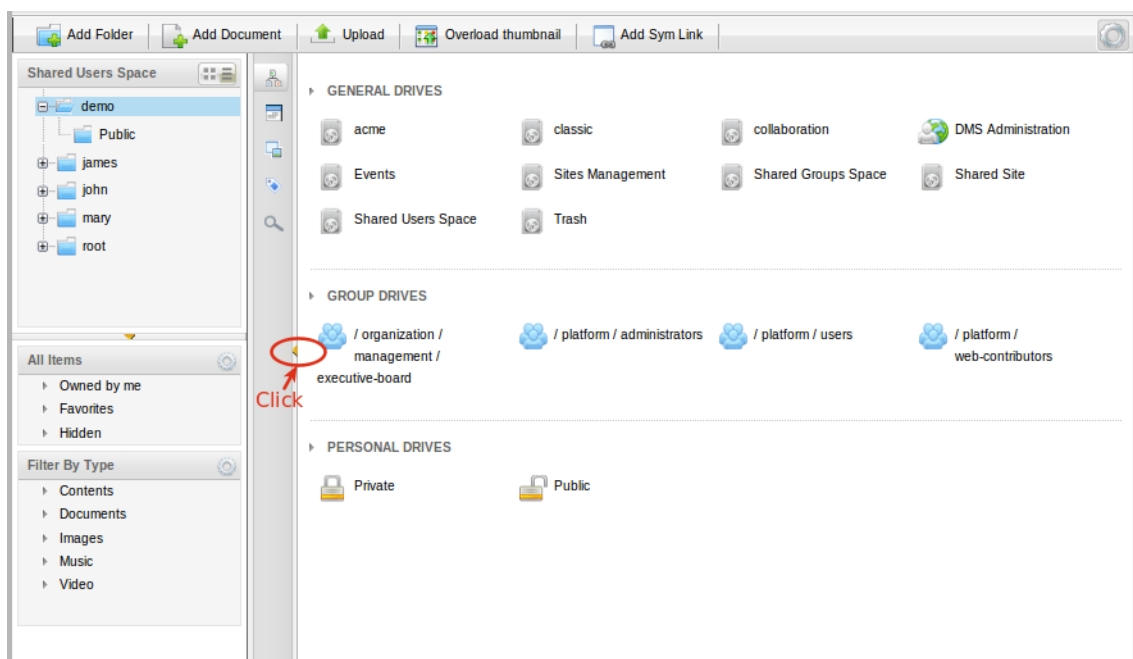
The drive will be displayed like the illustration below:



3. To show the side bar, tick the **Show sidebar** check box in the 'Preferences'.

### 2. Procedure 4.11. 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

There have many drives in the Content Explorer. Each drive has some views that enable you to look at data in the drive in a particular way. Each view has some tabs and each tab contains some functions (or called actions).

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

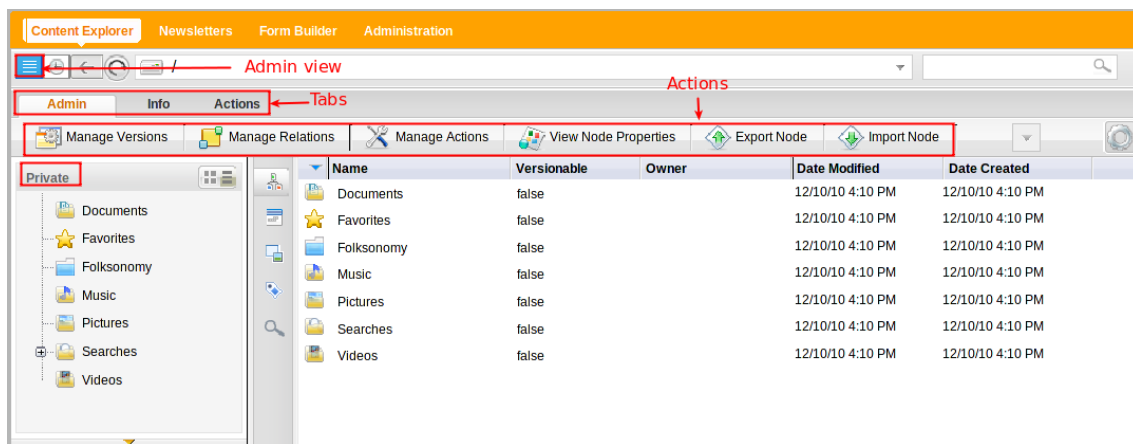


## View Types

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 the 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



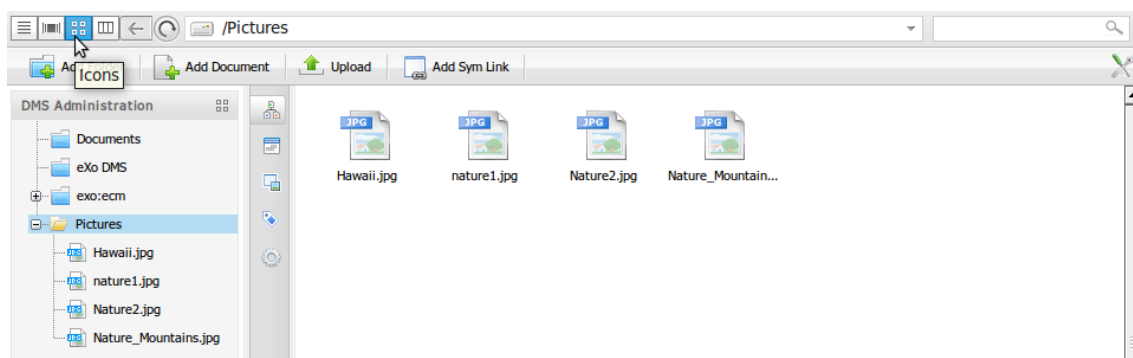
indicates that nodes are ordered in ascending order and on the contrary, the



icon means nodes are in descending order.

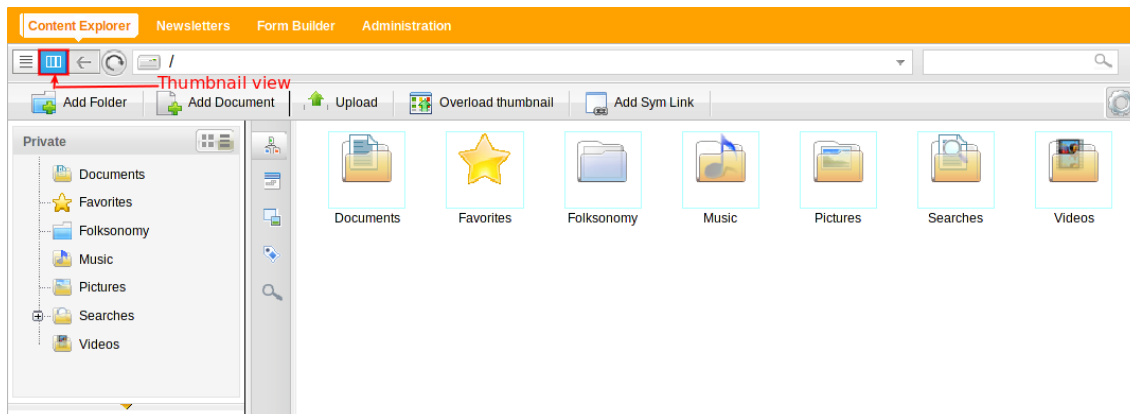
### 4.6.3.2. Icons View

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.

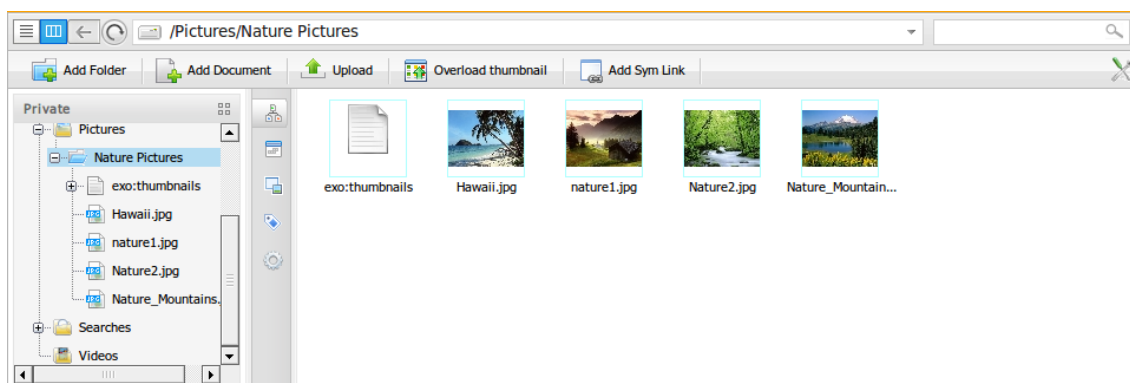


### 4.6.3.3. Thumbnails View

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 example, if you want to add thumbnail image for **Digital Assets** folder, do as follows:

#### Procedure 4.12.

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



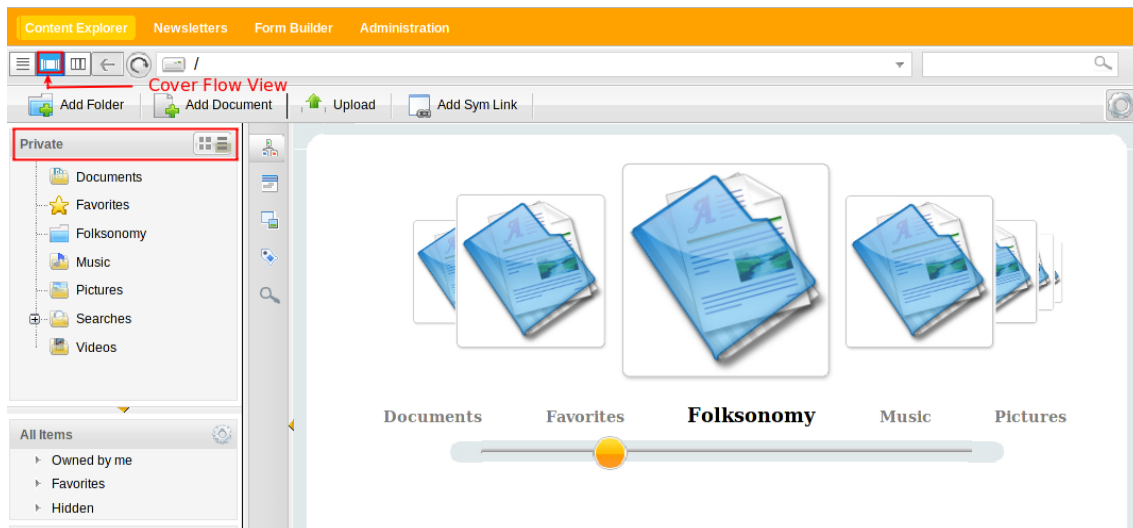
to open the **Add thumbnail image** form:

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.

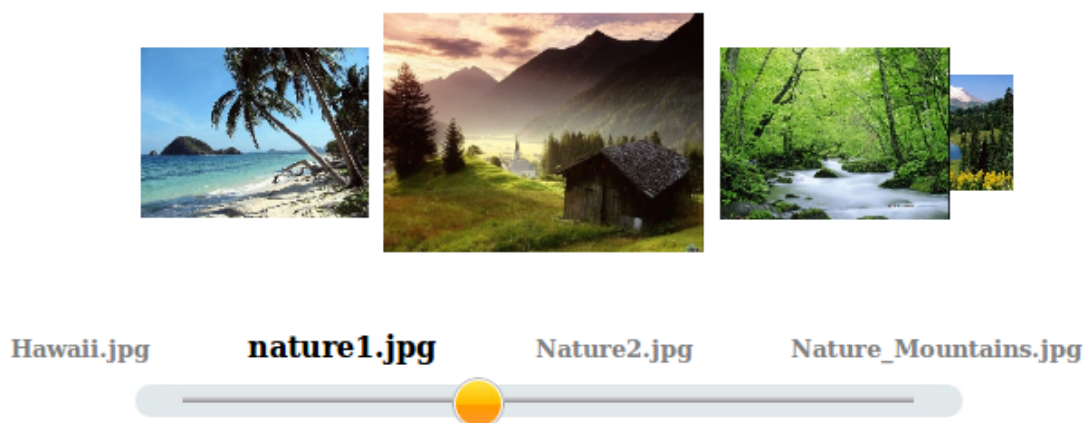
- Back to the parent folder (folder Pictures in this example) that contains the selected folder to see a icon used to display:

#### 4.6.3.4. Cover Flow View

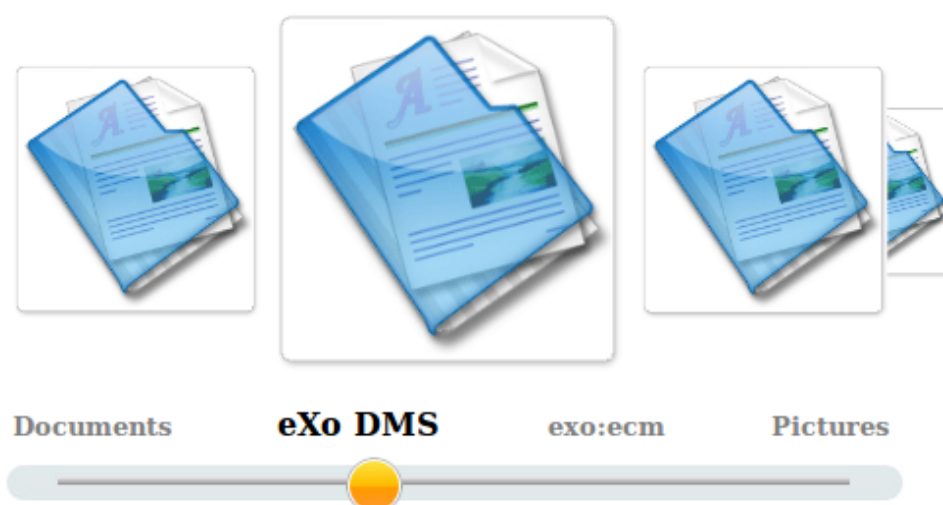
You can understand this view as a dynamical view because it brings the side-scrolling view to nodes in a folder. In this view, when a node is selected, its name is set with bold effect to more outstanding than others.



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.

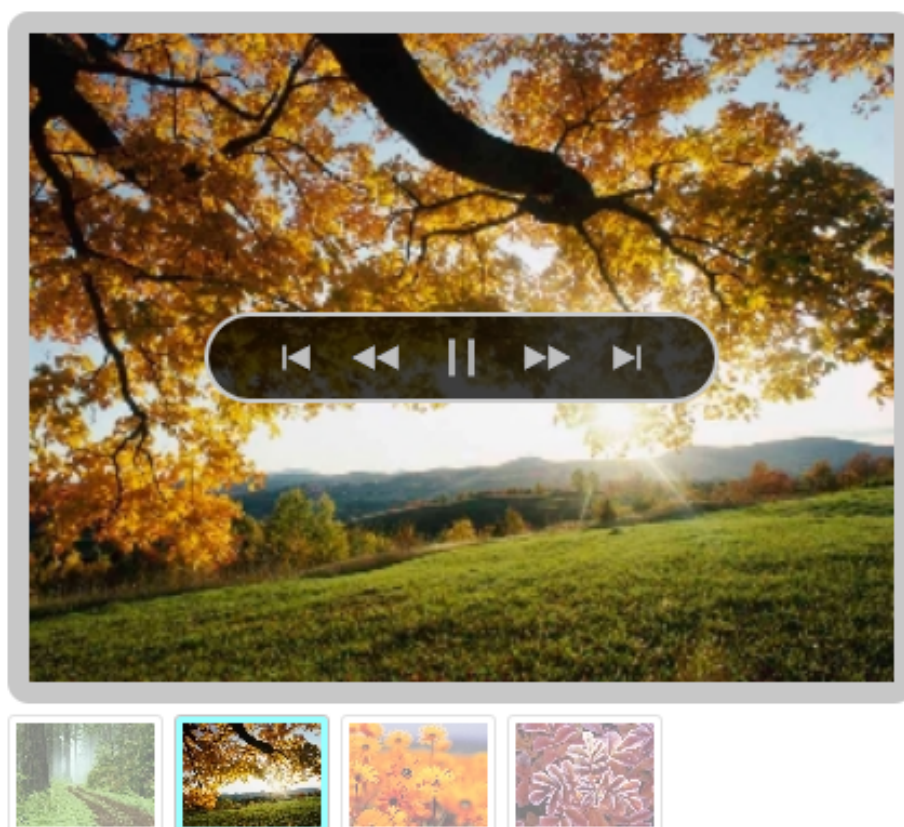
### 4.6.3.5. Slide Show View

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

To view pictures in slide show, click the  icon:  
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:

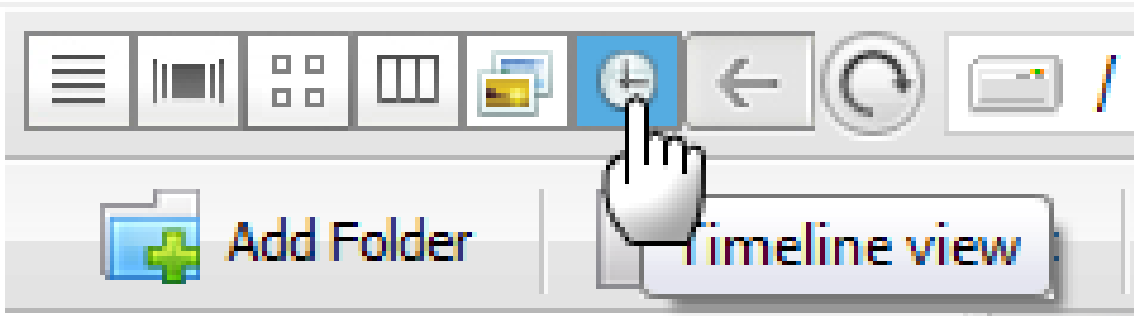
**Table 4.4.**

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 enables 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

Actions are added in tabs in Content Explorer by administrators. Depending on each tab and each drive you are browsing and your role, you can see which action.

eXo Content consists of many actions. This section shows you how to take all the actions in Content Explorer.

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 4.13.

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



on the action bar and the Add Category form appears:

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 in eXo Content, including **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 4.5.**

	File	Article	Podcast	Sample node	File Plan	Kofax document	Content folder	Document folder
File								
Article								
Podcast								
Sample node								

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



**Note**

-  : 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.

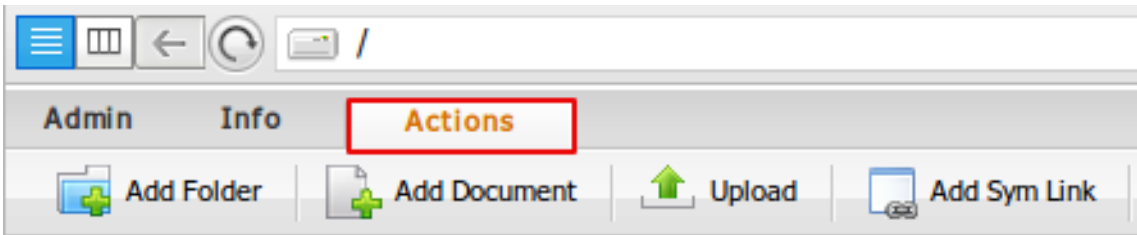
To add a new document, do the following steps:

**Procedure 4.14. 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.

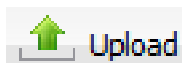


3. Select the document type (template) that you want to create from the drop-down list (Article is selected by default).

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


#### Procedure 4.15. Attach files to a document

1. Select a document that you want to attach files to and click



on the **Actions** bar.

The **Upload file** form will appear.

2. Enter a name into the **Name** field, otherwise, the **Name** field is automatically added with the name of the file.
3. Click **Browse** to select the attachment file. You can click  to add multiple files.
4. Click **Save** to attach the files or **Cancel** to quit.

#### Procedure 4.16. 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 for the field **Select Template**.

The **Add New Document** form will be displayed.

2. Input a name for the file document in the **Name** field. Some special characters cannot 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:

Select Template

Name  \*

Categories  +

Mime Type

Language

Content  \*

Title  +

Description  +

Creator  +

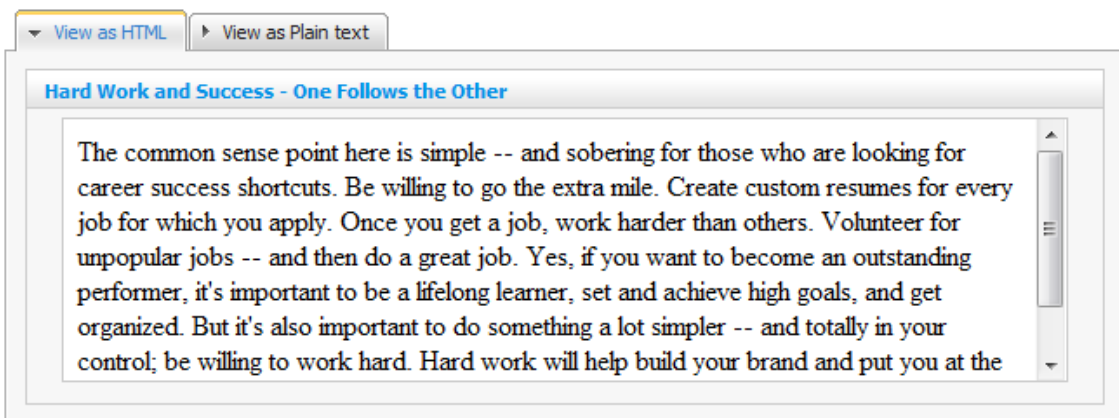
Source  +

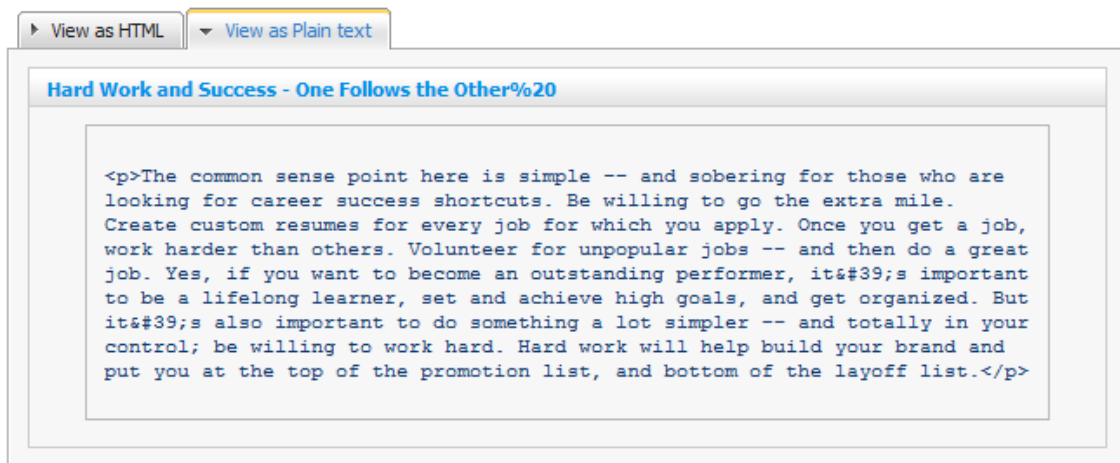
5. Fulfill all the fields **Title** ( the title of the File document), **Description** (some discription about the document), **Creator** ( the author of the document) and **Source** ( the sources of the document).

Click the plus icon to open more fields.

6. After inputting all required fields, click **Save as Draft** 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:





### Procedure 4.17. 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 for the field **Select Template**. (Actually, Article is selected by default).

The **Add New Document** form will be displayed.

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 as Draft** to accept the inputted values, or **Cancel** to quit.

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



**eXo news**

**Summary :**

**eXo at the "Solutions Intranet" Event in Paris – May 5th & 6th**

**Content :**



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

**Links :**

**Attachments :**


Avg. Rating: 0.0 Votes: 0

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 the 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



**Attachments :**

Contact list 

**Remove this attachment file**

Instructions to add an attachment are in [Attach files to a document](#).



### Existing Names

Document name can be the same as 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 4.18. 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 for the field **Select Template**.

The **Add New Podcast** form will be displayed.

**Table 4.6.**

Field	Details
Name	The name of a document. This field is required. Some special characters are not allowed to input in the Name field(@ # % & * ( ) " ' : ; [ ] { } / !).
Title	The title of a document.
Categories	Categories of a document.
Link	The link to the source path of the uploaded media file. This field is required.
Author	The author of the uploaded media file.
Explicit	It is used to indicate whether or not your podcast contains an explicit material.  There are two options: <ul style="list-style-type: none"> <li>• Yes: an "explicit" parental advisory graphic will appear next to your podcast artwork</li> <li>• No: you see no indicator – bank is default advisory type</li> </ul>
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.

Field	Details
Description	Information about the uploaded media file.
Mime type	The type of the uploaded media file.
Length	The length of the uploaded media file.

- Input values for fields. To upload a media file, click the **Browse...** button and select the media file from your machine.
- Click **Save as Draft** to finish, or **Cancel** to quit without saving changes.



### Exisiting Names

Document name can be the same as 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:

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

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

### Procedure 4.19. Create a new Sample node




- Follow the instructions in [Add a new document](#): to open the **Add New Document** window and select **Sample node** from the drop-down list for the field **Select Template**.

The **Add New Sample Node** form will appear.

- Complete the appropriate fields.
- To upload an image, click the **Browse...** button and select an image from your computer.

- Click **Save as Draft** to accept or **Cancel** to quit without saving changes.

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

<b>Node name</b> sample-node	
<b>Title</b> Sample node	
<b>Date</b> May 19 2010	
<b>Date time</b> May 21 2010 09:31:39	
<b>Description</b> One of the best coffeshop in Hanoi	<b>Image</b> 
<b>Summary</b> A funky new cafe that can be a challenge for some to find.	<b>Content</b> Tucked away in an alley off the busy Old Quarter street of Ma May. This place has great and reaxing athmosphere to enjoy coffee with friends.
<b>Relations</b> - Best spots in Hanoi .odt	<b>Attachments</b> - Hanoi tourguide.png 
Avg. Rating: 0.0 Votes: 0 	

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 4.20. Create a new File Plan

- Follow the instructions in [Add a new document](#): to open the **Add New Document** window and select **File plan** from the drop-down list for the field **Select Template**.

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

- Fulfill in the appropriate fields of the tabs in the Add File plan form.
- Click **Save as Draft** to accept creating a file plan, or **Cancel** to quit.


## Tabs in the Add File plan form

### The Name tab

Select Template File Plan

**Name** | Record properties | Process properties

Name  \*


Categories  

Language en

File plan note

Save as Draft Close

**Table 4.7.**

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

The screenshot shows a software interface with three tabs: 'Name', 'Record properties' (selected), and 'Process properties'. The 'Record properties' tab contains the following fields:

- Record category identifier**: A text input field with an asterisk (\*) indicating it is required.
- Disposition authority**: A text input field with an asterisk (\*) indicating it is required.
- Permanent record indicator**: A dropdown menu currently set to 'True' with an asterisk (\*) indicating it is required.
- Disposition instructions**: A large text area for entering instructions.
- Contains records folder**: A dropdown menu currently set to 'True' with an asterisk (\*) indicating it is required.
- Default media type**: A dropdown menu currently set to 'Electronic' with an asterisk (\*) indicating it is required.
- Default marking list**: A dropdown menu currently set to 'None' with an asterisk (\*) indicating it is required.
- Default originating organization**: A text input field with an asterisk (\*) indicating it is required.
- Vital record indicator**: A dropdown menu currently set to 'True' with an asterisk (\*) indicating it is required.
- Vital record review period**: A dropdown menu currently set to 'One Minute'.

**Table 4.8.**

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:

The screenshot shows the 'Process properties' tab in a software application. The tab contains the following fields and their current values:

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

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

**Table 4.9.**

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.

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

 **File Plan Content:** new File Plan

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

Records
Obsolete Records
Superseded Records
Vitals Records

Record Id
Record name
Originator
Date Received
Originating Organization

## Procedure 4.21. Create a new Kofax


- 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 for the field **Select Template**.

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

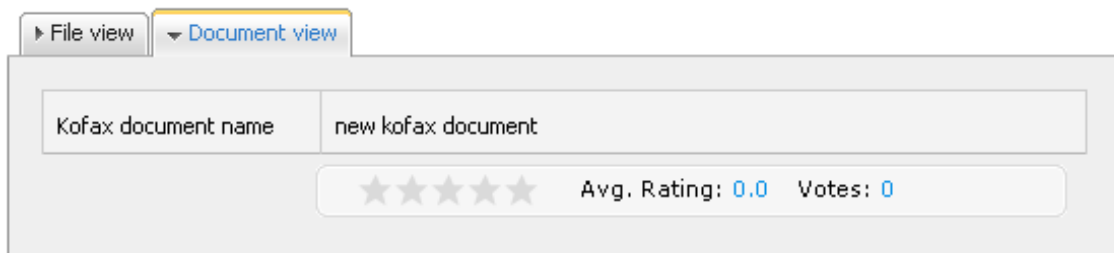
Select Template
Kofax document

Name
Categories
Language
en

Save as Draft
Close

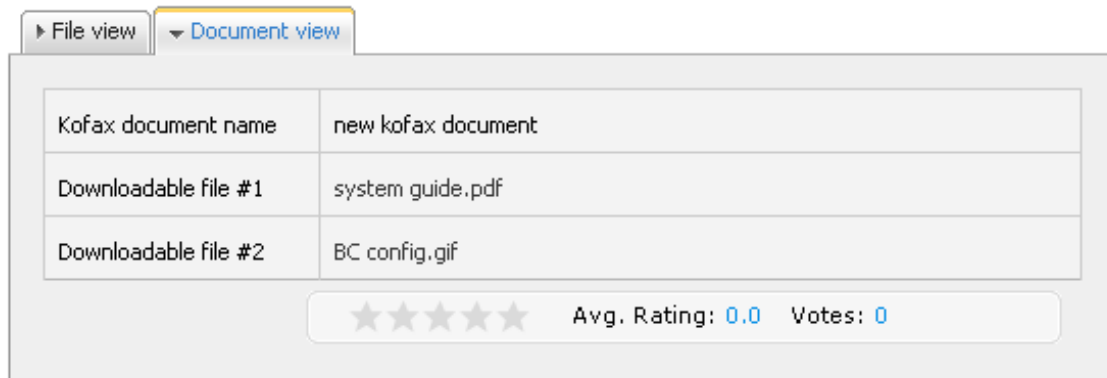
2. Input a name for a Kofax document in the Name field. This field is required. Some special characters can not be used in the Name field(@ # % & \* ( ) " ' : ; [ ] { } / !).
3. Select categories for a Kofax document by clicking the  icon.
4. Click **Save as Draft** to accept creating a document or **Cancel** to quit the form.

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



The screenshot shows a web interface with two tabs: 'File view' and 'Document view'. The 'Document view' tab is active. Below the tabs is a form with a label 'Kofax document name' and a text input field containing 'new kofax document'. Below the input field is a rating section with five stars, the text 'Avg. Rating: 0.0', and 'Votes: 0'.

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



The screenshot shows the same web interface as before, but with additional rows in the form. Below the 'Kofax document name' field, there are two rows for downloadable files. The first row is labeled 'Downloadable file #1' and contains 'system guide.pdf'. The second row is labeled 'Downloadable file #2' and contains 'BC config.gif'. The rating section remains the same: five stars, 'Avg. Rating: 0.0', and 'Votes: 0'.

### Procedure 4.22. 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 for the field **Select Template**.

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

Select Template **Event**

Title

Name

Language **en**

Location

Google Maps ? ☐

Start date/time

End date/time

URL

Summary

Content

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 will be displayed like the illustration bellow:

**Paris**

**eXo-Big Event**

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


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

The event will be displayed in a website as:

[Overview](#) [News](#) [Events](#) [Newsletters](#) [Contact Us](#)

All |

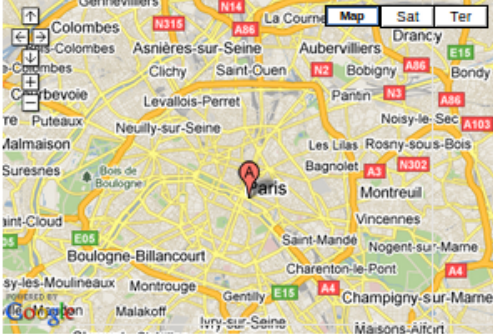
Events [RSS Feed](#)




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


[readmore](#)

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



[View Larger Map](#)

**Attachments :**  


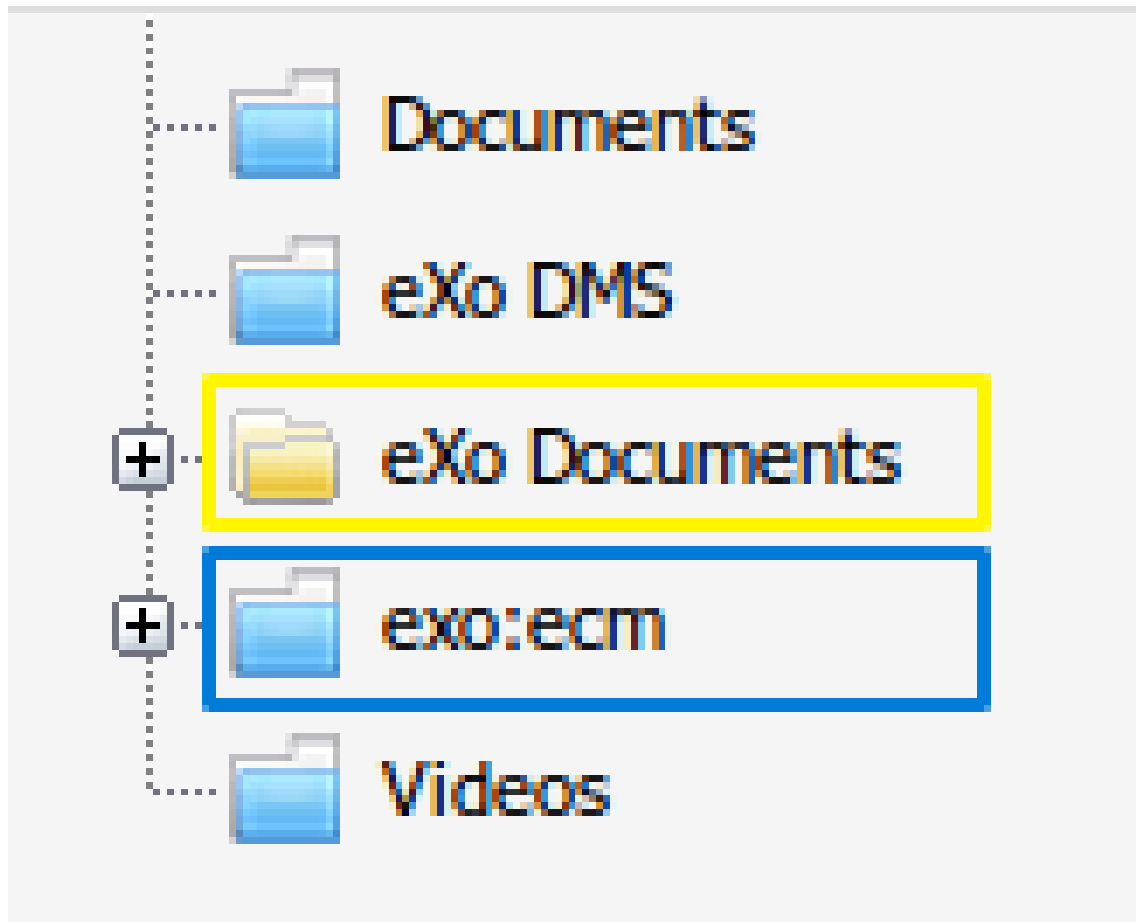
Avg. Rating: 0.0 Votes: 0 

### 4.6.4.3. Add Folder

You can create a document immediately in a specific drive; however, adding a document into a specific folder enables you to manage documents better.

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 cannot add a Content Folder into a Document Folder
- You cannot import an exported a Content Folder into a Document Folder.
- You cannot import an exported Article, Sample node, Kofax into a Document Folder.

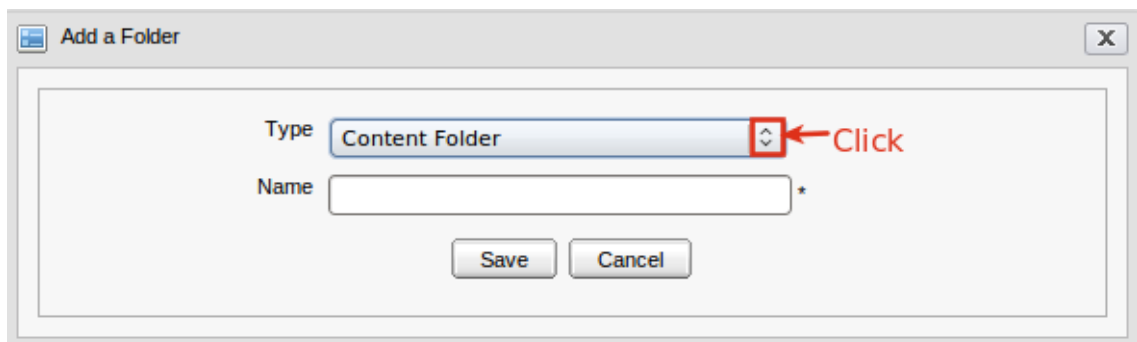
### Procedure 4.23. Create a folder

1. Select the path to create a folder.

2. Click



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

A screenshot of the "Add a Folder" dialog box. It has a title bar with a close button. Inside, there are two labels: "Type" and "Name". The "Type" label is next to a dropdown menu currently showing "Content Folder". A red box highlights the dropdown arrow, with a red arrow pointing to it and the word "Click" in red text. The "Name" label is next to a text input field. Below the input field are "Save" and "Cancel" buttons.

3. Click



to see the type list and select a 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 as 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.

#### 4.6.4.4. Add translations to a document

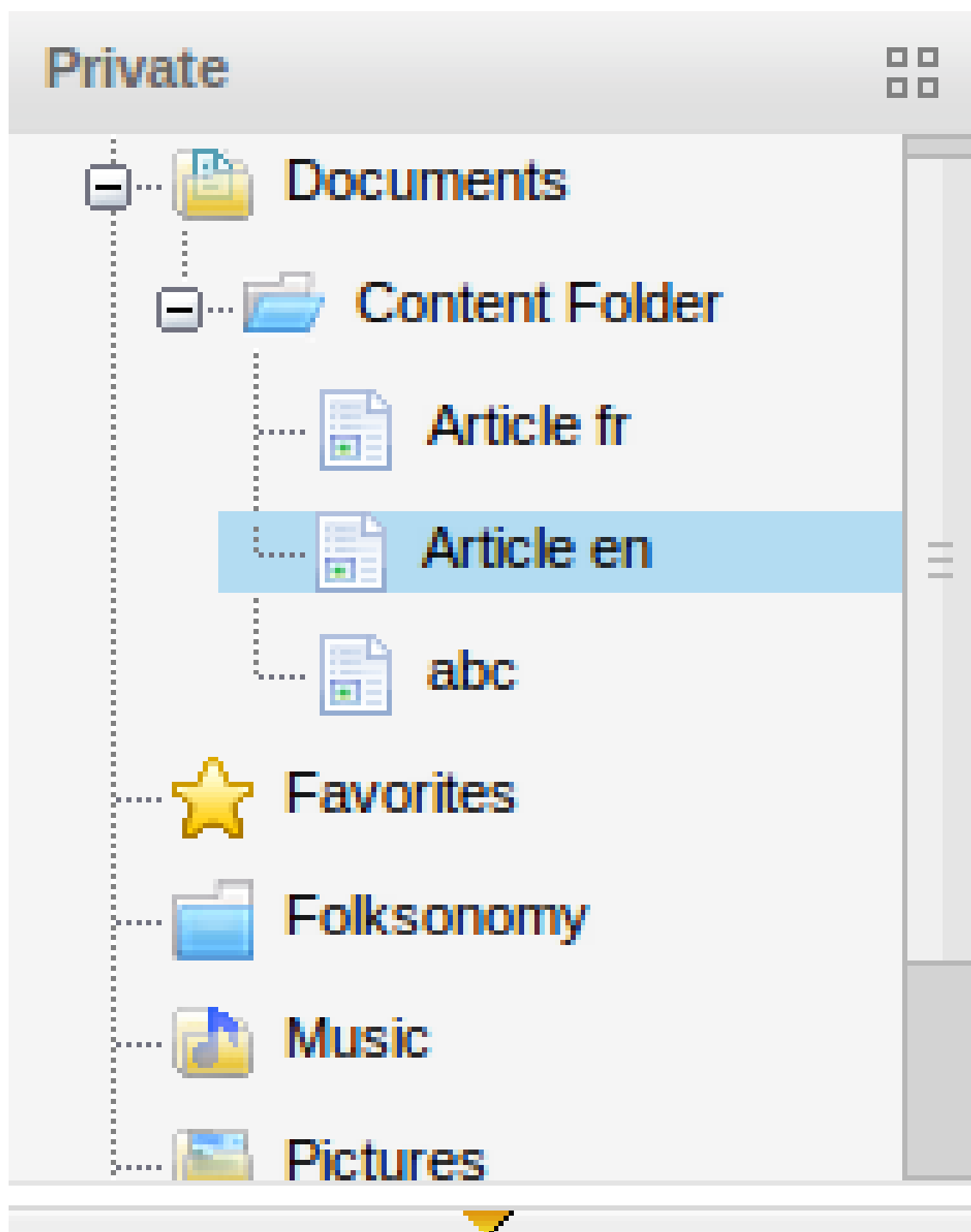
This function enables users to add multiple languages for a document. This action is similar to adding a language.

By default, the **Add translation** button is not displayed on the action bar.

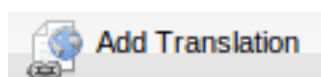
Enable this function by navigating to **Administration > Content Presentation > Manage Views**. See [Section 5.3.2.3, “Manage Views”](#) to know how to add the Add translation button to the tabs on the action bar in Content Explorer.

#### Procedure 4.24.

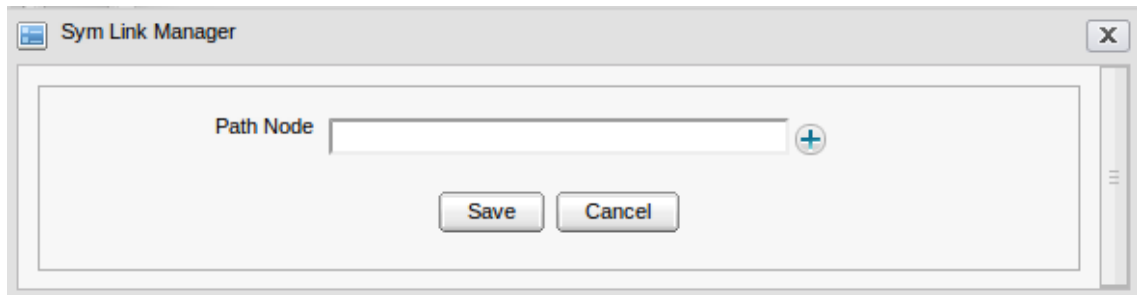
1. Select a document you want to add the translation for. For example; select an **Article** which is in *English*:



2. Click



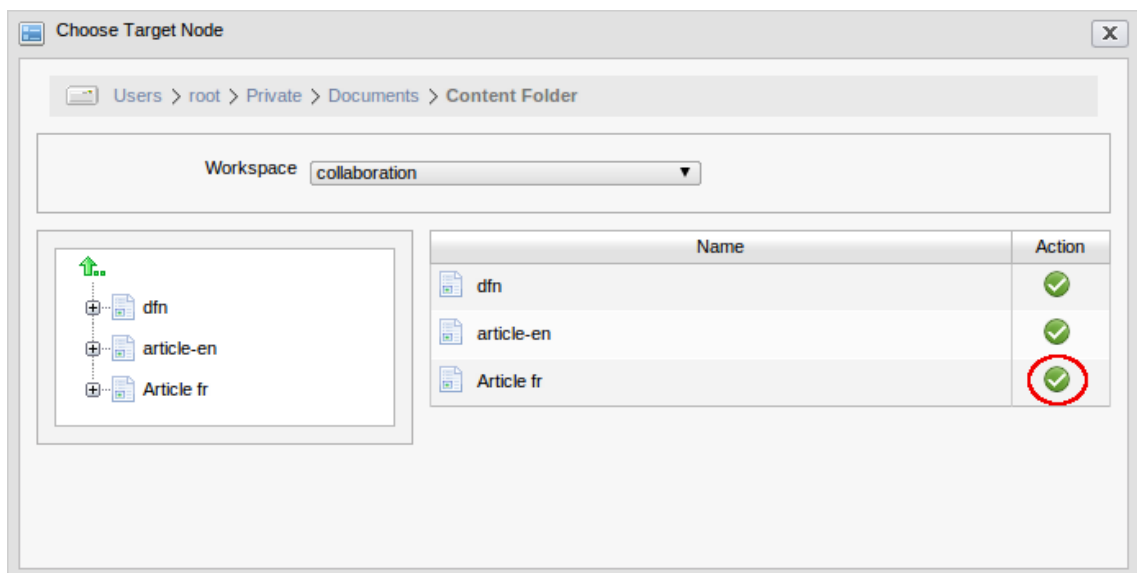
on the **Action** bar. The **SymLink Manager** will appear:



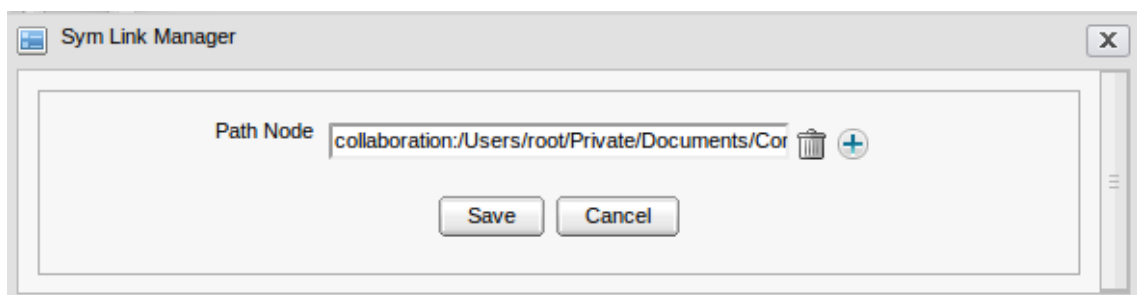
3. Click



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

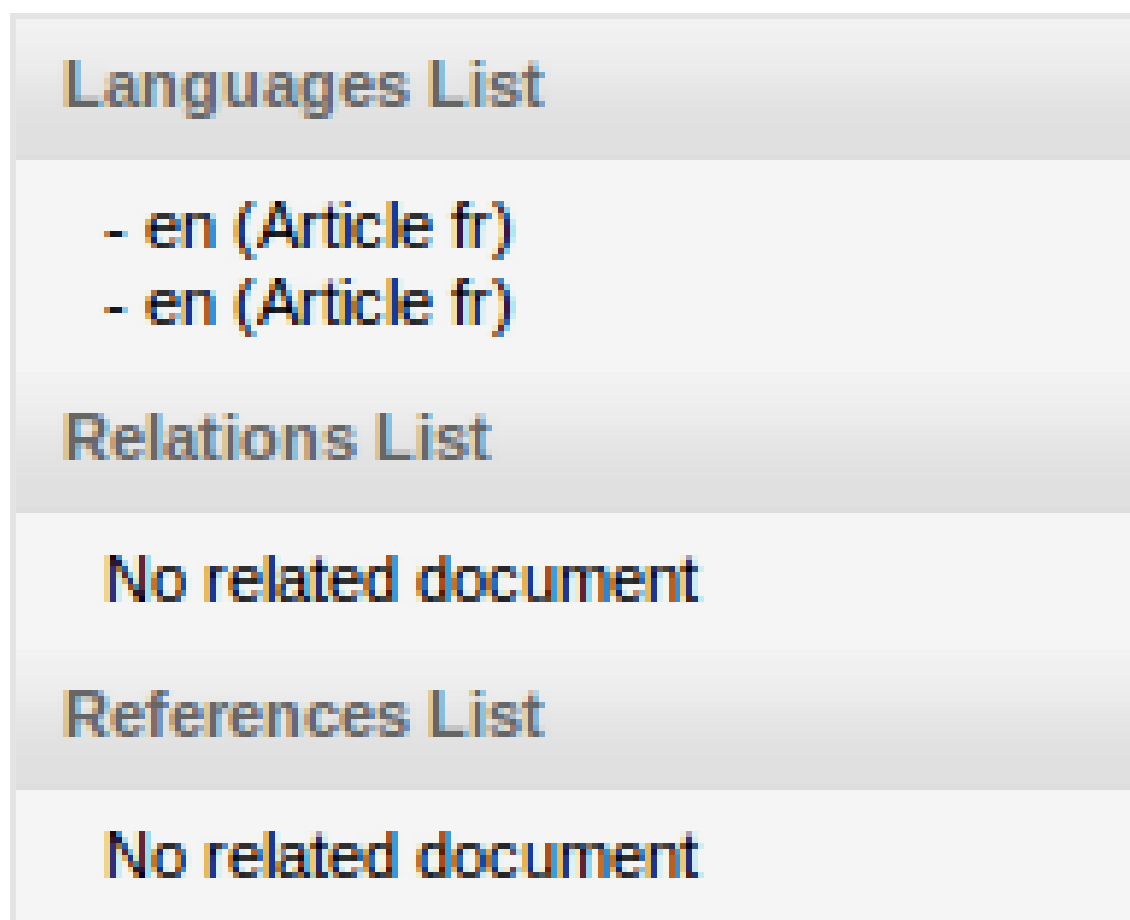


4. After you have selected the document, click **Save** on the **SymLink Manager** form:



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

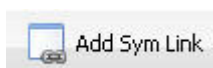
You also easily add a sym link for a document for the purpose of fast accessing the document that you are looking for:

To add a symlink do as follows:

#### Procedure 4.25.

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

2. Click  the



on the action bar. The Sym Link Manager pop-up will appear:

**Table 4.10.**

Field	Details
Path Node	The path of a link
Symlink name	The name of the link.

3. Click the



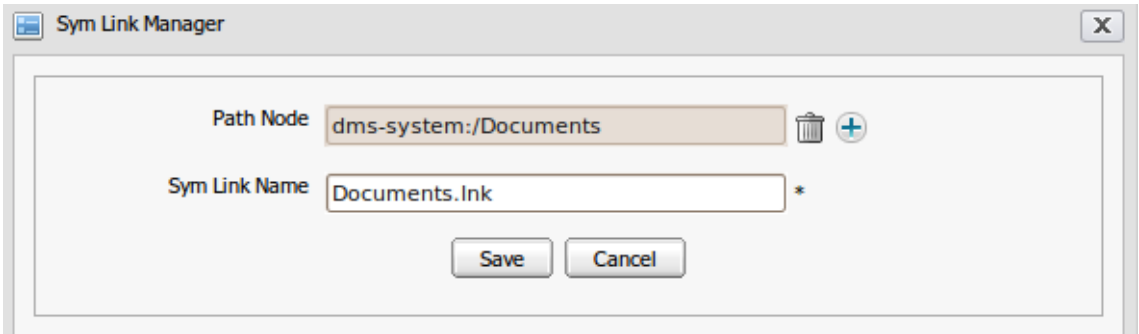
icon to open the **Choose Target Node** form.

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

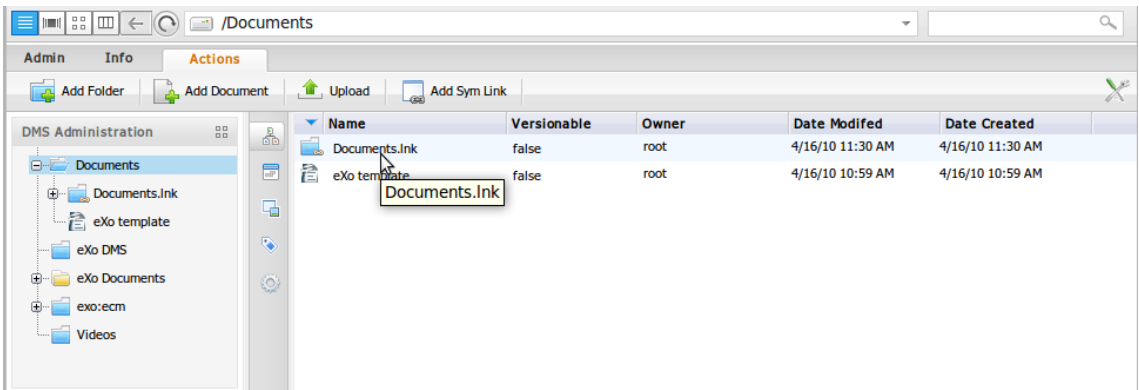
5. Click the



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.



6. Click **Save** to add symlink.



#### 4.6.4.6. Comment

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

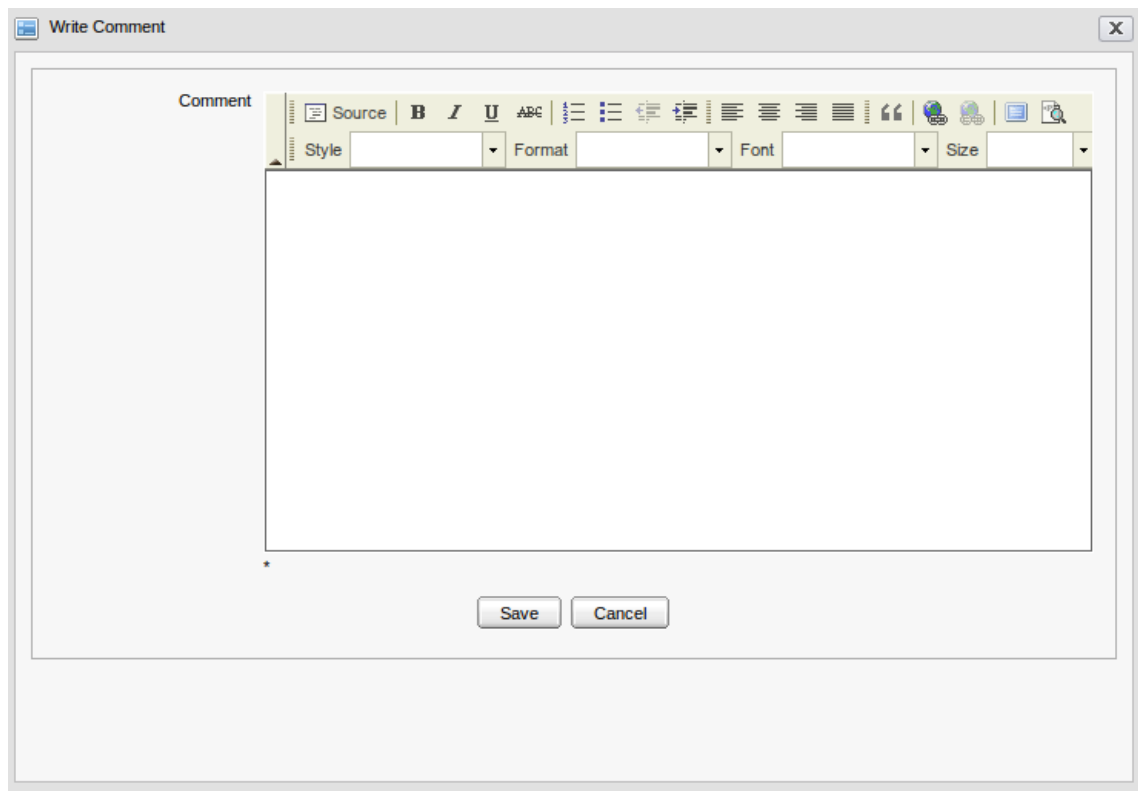
#### Procedure 4.26.

1. Select a document that you want to add a comment to.
2. Click




on the action bar.

The **Add Comment** form appears:



3. Add your comment in the **Comment** field.
4. Click **Save**.

Comments are shown at the bottom of the document:



### Skills

Languages **English**

**Summary :**


Communication skills play an important part in our success.

**Content :**

Being able to communicate effectively is therefore essential if you want to build a successful career. To do this, you must understand what your message is, what audience you are sending it to, and how it will be perceived. You must also weigh-in the circumstances surrounding your communications, such as situational and cultural context.

**Links :**

**Attachments :**

Avg. Rating: 4.0 Votes: 1 

Last comment posted by **root** at 8:57 AM. Wed, Jun 24, 2009

[1 Comments](#) [Show comments](#)



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

Last comment posted by **marry** at 5:38 PM. Thu, Jun 18, 2009

[2 Comments](#) [Hide comments](#)

Commented by **marry** - Email: **marry@localhost** - 5:38 PM. Thu, Jun 18, 2009

This article is very useful for people who want to improve their communication skills.

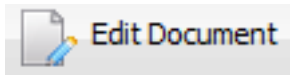
You can edit your comment by clicking the  icon or delete it by clicking .

#### 4.6.4.7. Edit documents

There are two ways to edit a document.

##### Procedure 4.27. Method One

1. Select a document you want to edit in the left panel.
2. Click



on the Action bar.

Or:

##### Procedure 4.28. 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.

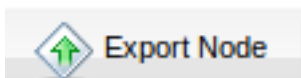
3. Click **Save** to commit the changes.

#### 4.6.4.8. Export nodes

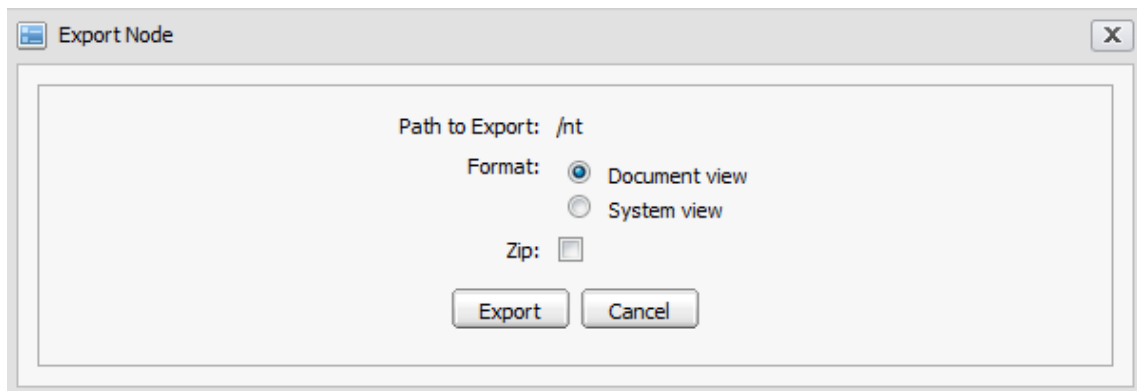
Nodes can be exported into either **.xml** or **.zip** file types.

##### Procedure 4.29.

1. Select a node that you want to export.
2. Click



on the Action bar to show the **Export Node** form:

A dialog box titled "Export Node" with a close button (X) in the top right corner. The dialog contains the following fields and controls:

- "Path to Export:" followed by a text field containing "/nt".
- "Format:" followed by two radio buttons: "Document view" (selected) and "System view".
- "Zip:" followed by a checkbox.
- At the bottom, there are two buttons: "Export" and "Cancel".

Table 4.11.

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 <b>.zip</b> file.

3. 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

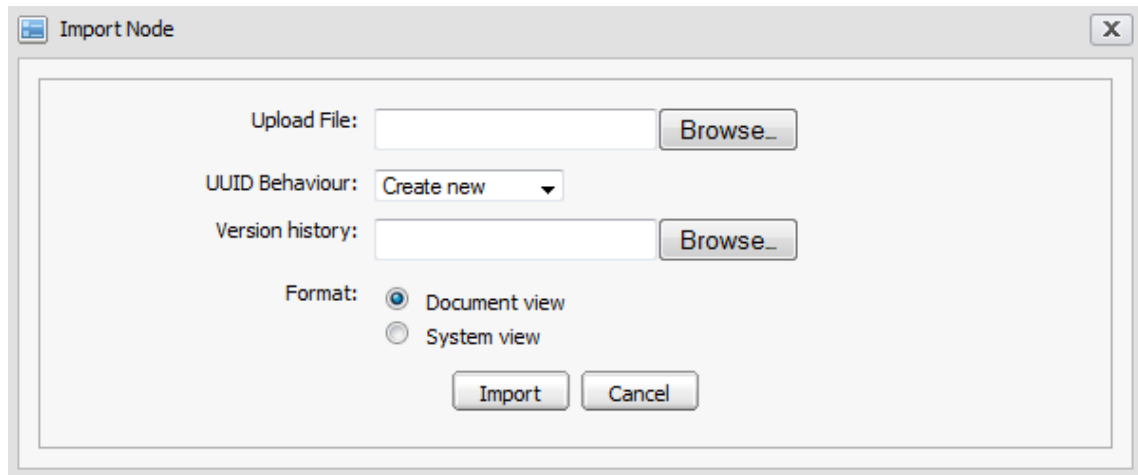
Nodes that are in the **.xml** file format can be imported in to the JCR Explorer system.

#### Procedure 4.30.

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



on the action bar . The **Import Node** form appears.



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

5. Click **Browse** next to the *Version history* to select a version to import.
6. Select a format.
7. 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 4.31.

1. Select the node you want to add an action to.
2. Click



on the action bar.

The **Manage Actions** form will appear.

3. Select the **Add Actions** tab to open the form to add an action to the folder.

Manage Actions

Create an Action of Type: `exo:addMetadataAction` Click

Add/Edit an Action

Id

Name: \*

Lifecycle: User Action, schedule, node\_added, node\_removed, property\_added \*

Metadata: `metadata:siteMetadata` Click

Is deep: ☒

NodeTypes: + 🔍

Description:

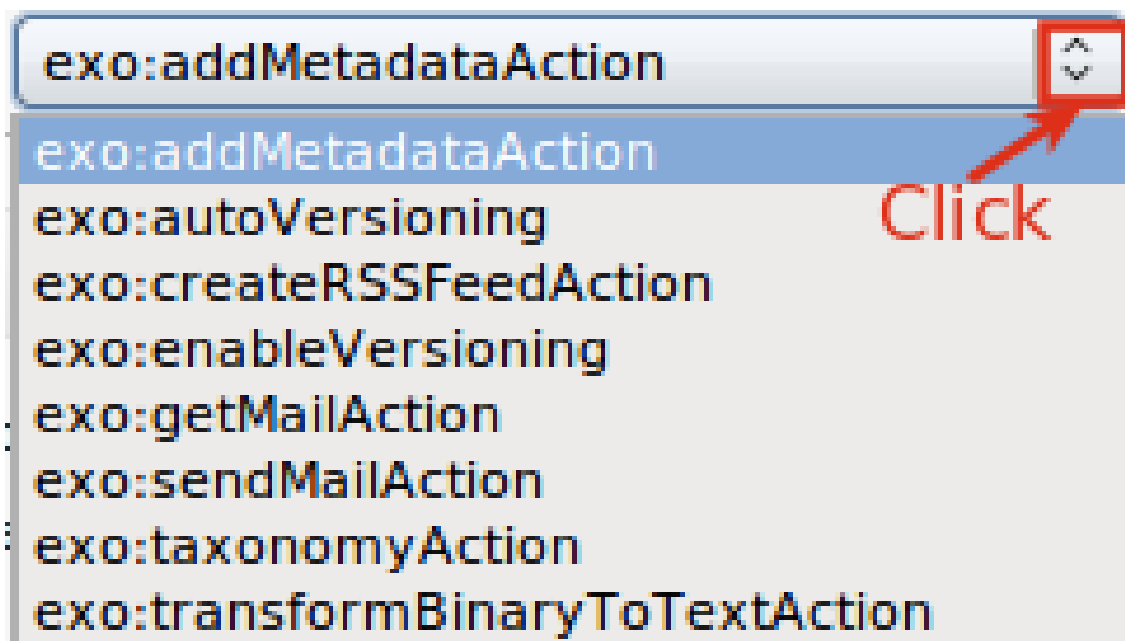
Affected NodeTypes: + 🔍

Save Back

4. Click



and select the type of action from the drop-down menu.

**Table 4.12.**

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	This action creates categories
exo:transformBinaryTo TextAction	This action converts <i>.pdf</i> or <i>.doc</i> file types to plain text.

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

**Table 4.13.**

<b>ID</b>	The Id of action. This field is created automatically and can not be modified.
<b>Name</b>	The name of this action. This name is internal to the JCR explorer.
<b>Lifecycle</b>	Select the lifecycle for this action. The action will be executed depending on the lifecycle:

- **'Add'**: The action will be executed to a new document, but not to a subfolder when the document or the subfolder is created in the folder in which an action has been added to. It's also applied to a new document in the subfolder of the folder.
- **'Modify'**: the action will be executed when a folder /node is modified.
- **'User action'**: The action is executed when right-clicking on the folder and then selecting the action.
- **'Remove'**: The action will be executed to a document, but not to a subfolder in the folder when the document or the subfolder is moved.
- **'Schedule'**: the action is done at specific time. There are 2 schedule lifecycle types: period and cron. (See more about Schedule lifecycle).

If you need the same action to be executed in several lifecycles, you have to create several actions.

6. 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.

If an action added with the lifecycle 'user action', it will be applied for the current node. And an action added with other lifecycles, it will be applied for the child nodes.



### 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 4.32.

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



that corresponds to the action you want to view.

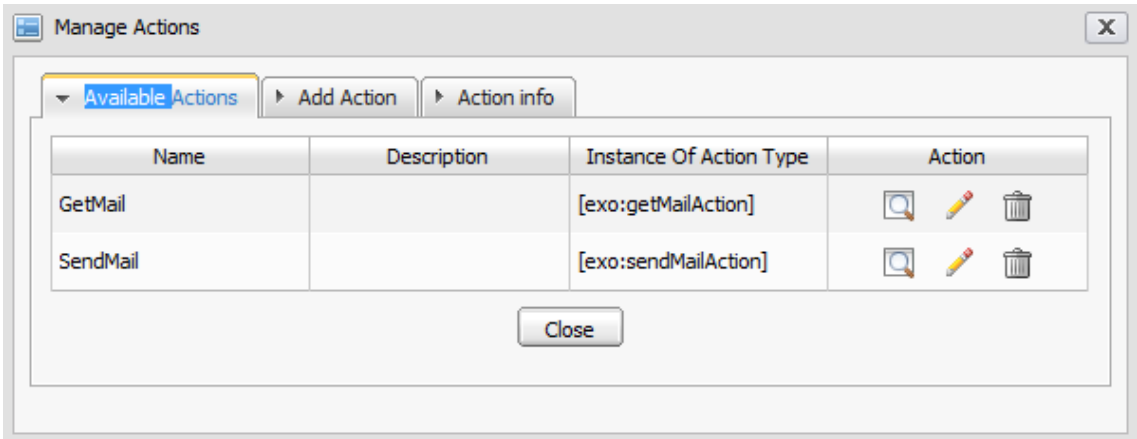
The details will be displayed in the **Action info** tab:

Manage Actions	
<div> <div>Available Actions</div> <div>Add Action</div> <div>Action info</div> </div>	
Action name	GetMail
Is deep	true
nodeTypeName	
Lifecycle	read
Affected NodeTypes	
Protocol	pop3
Host	
Port	
Folder	Inbox
User name	support@exoplatform.com
Description	
store-path	Users/root/Private/Mail
<div>Cancel</div>	

#### 4.6.4.10.3. Edit an action

##### Procedure 4.33.

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**:

**Action form**

Id: GetMail

Name: GetMail \*

Lifecycle: User Action (selected), schedule, node\_added, node\_removed, property\_added \*

Protocol: pop3

Host:

Port:

Folder: Inbox

User Name: support@exoplatform.com

Password:

Is deep: ☒

NodeTypes: + -

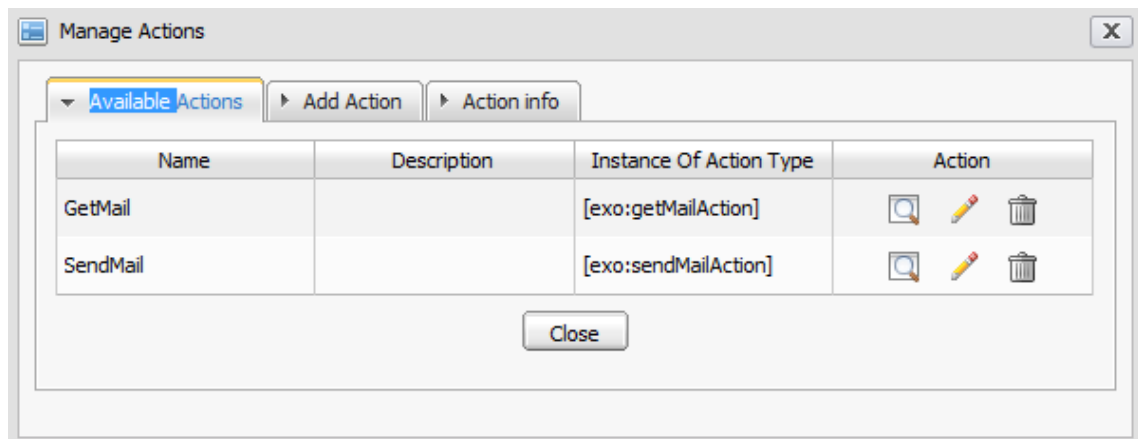
Description:

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

#### 4.6.4.10.4. Delete an action

#### Procedure 4.34.

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 or **Cancel** to quit.

#### 4.6.4.11. Manage Auditing

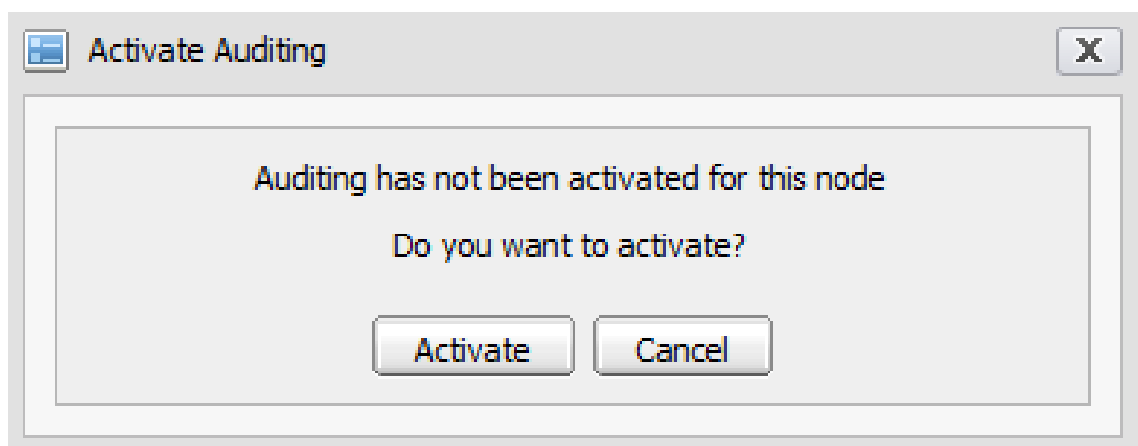
This function logs property changes in nodes.

#### Procedure 4.35.

1. Select a node.
2. Click



on the action bar. The **Activate Auditing** message appears.



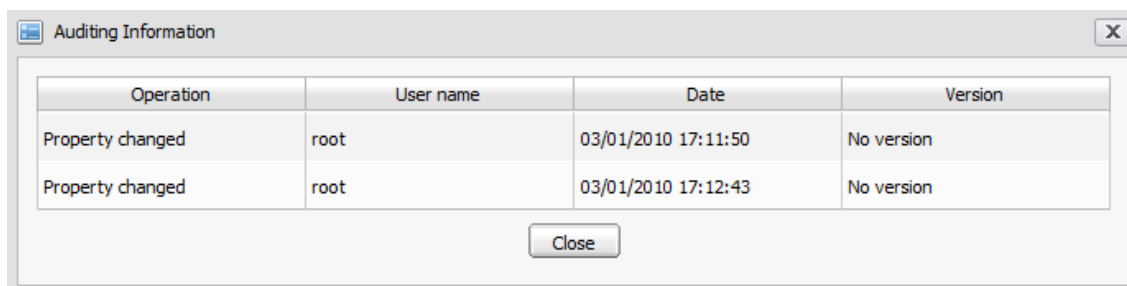
3. Click **Activate** to activate auditing on the selected node.

4. Click



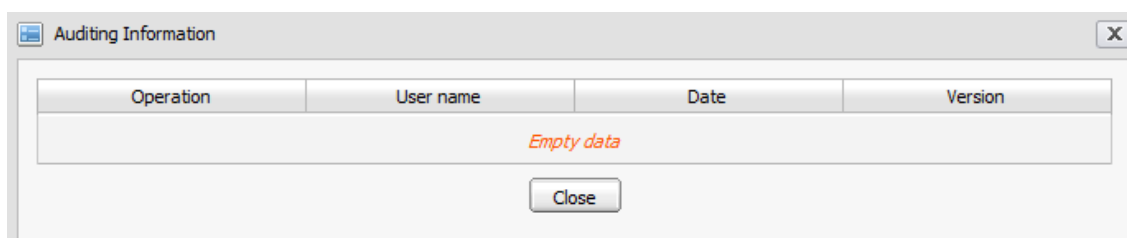
again to view audit information for the selected node.

The **Auditing Information** list appears.

A dialog box titled "Auditing Information" with a close button (X) in the top right corner. It contains a table with four columns: Operation, User name, Date, and Version. There are two rows of data. Below the table is a "Close" button.

Operation	User name	Date	Version
Property changed	root	03/01/2010 17:11:50	No version
Property changed	root	03/01/2010 17:12:43	No version

If the node has no audit information the form will appear like this:

A dialog box titled "Auditing Information" with a close button (X) in the top right corner. It contains a table with four columns: Operation, User name, Date, and Version. The table is empty, and the text "Empty data" is displayed in red in the center. Below the table is a "Close" button.

Operation	User name	Date	Version
Empty data			

### 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 4.36. Add a category

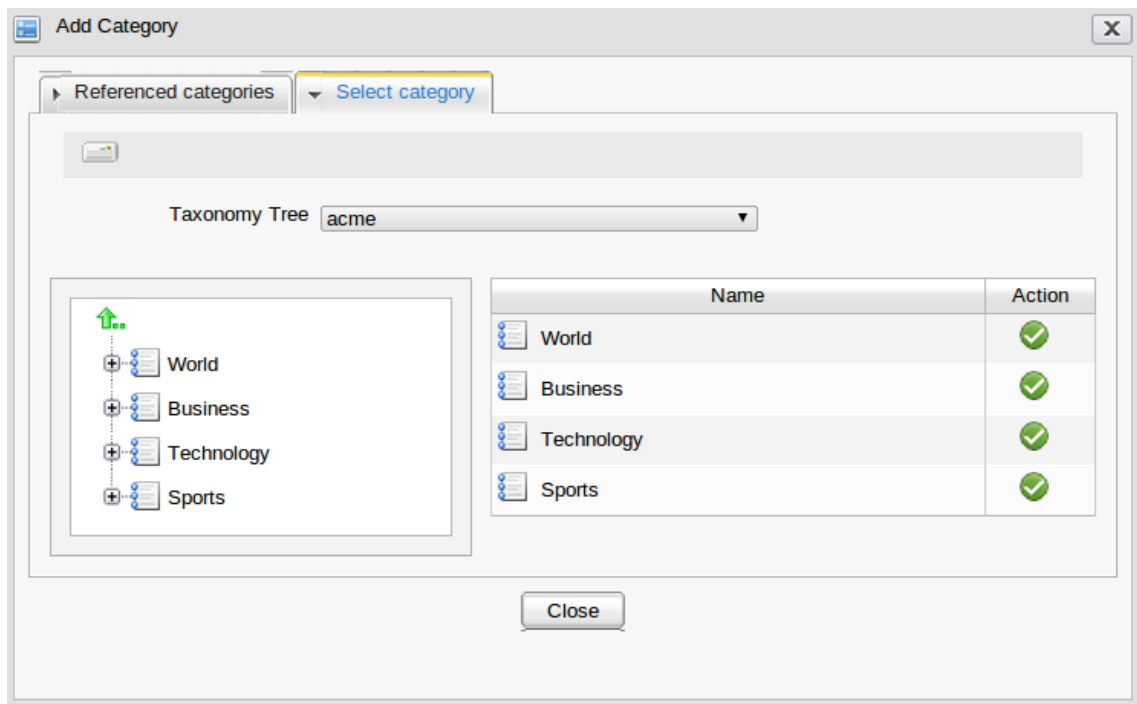
1. Select the node that you want to add a category to.
2. Click



on the action bar.

The **Add category** form appears.

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



4. 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 4.37. View a category

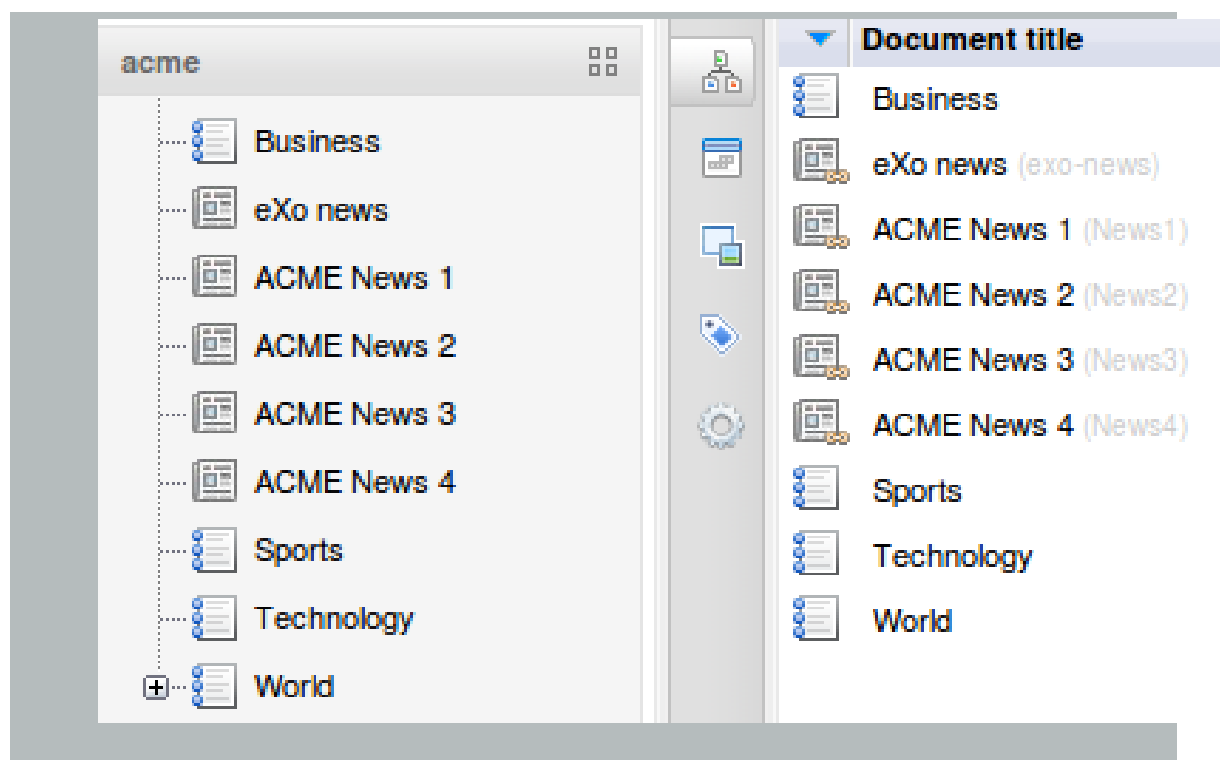
1. Go to the drive that contains the category you have added. There will be a list of categories available.
2. Select a category you want. The documents in that category will be listed.



#### Copy/paste nodes

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

When copying 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 4.38. Delete a category

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 4.39. Hide a Node

1. Select the node you want to hide.

2. Click



on the Action bar to hide the node.

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

3. **Show a Node**

To reveal a hidden node, click



again.

#### 4.6.4.14. Manage Publications

This function is used to manage node publication.

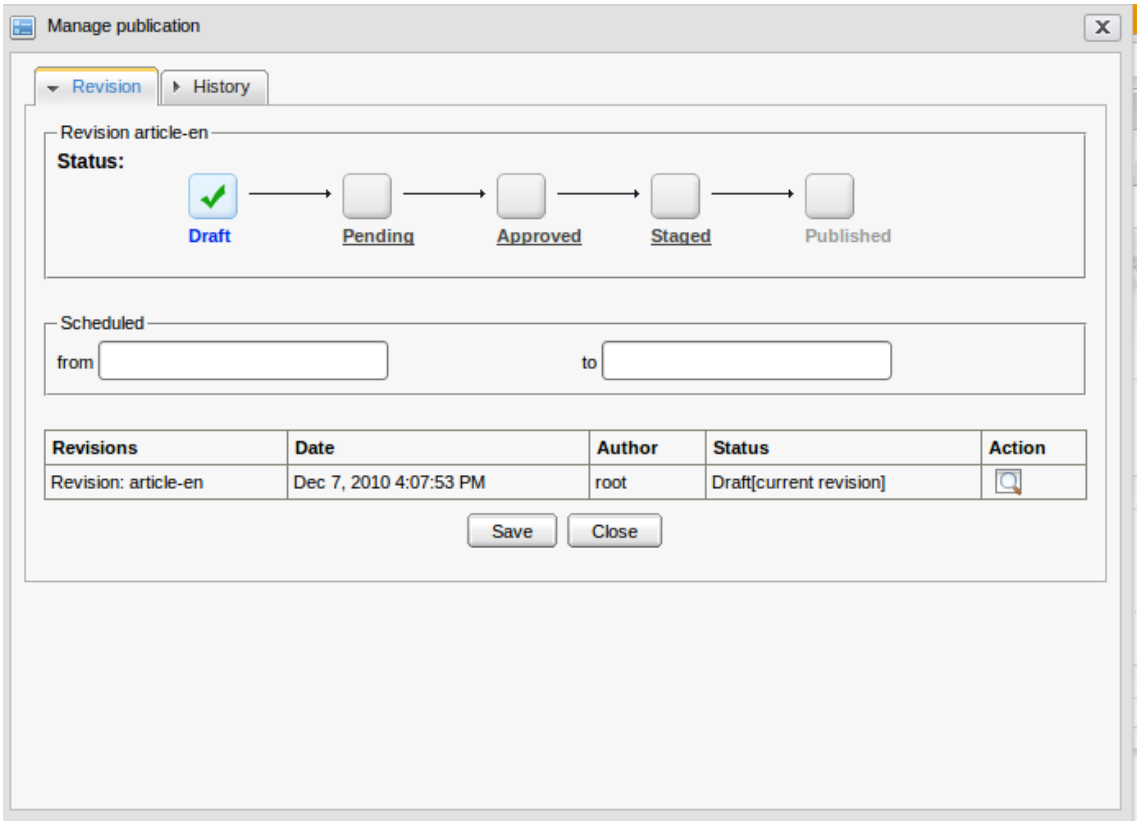
#### Procedure 4.40. Manage Publications

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



on the actions bar.

The **Manage Publications** form appears:



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

- 3. Click

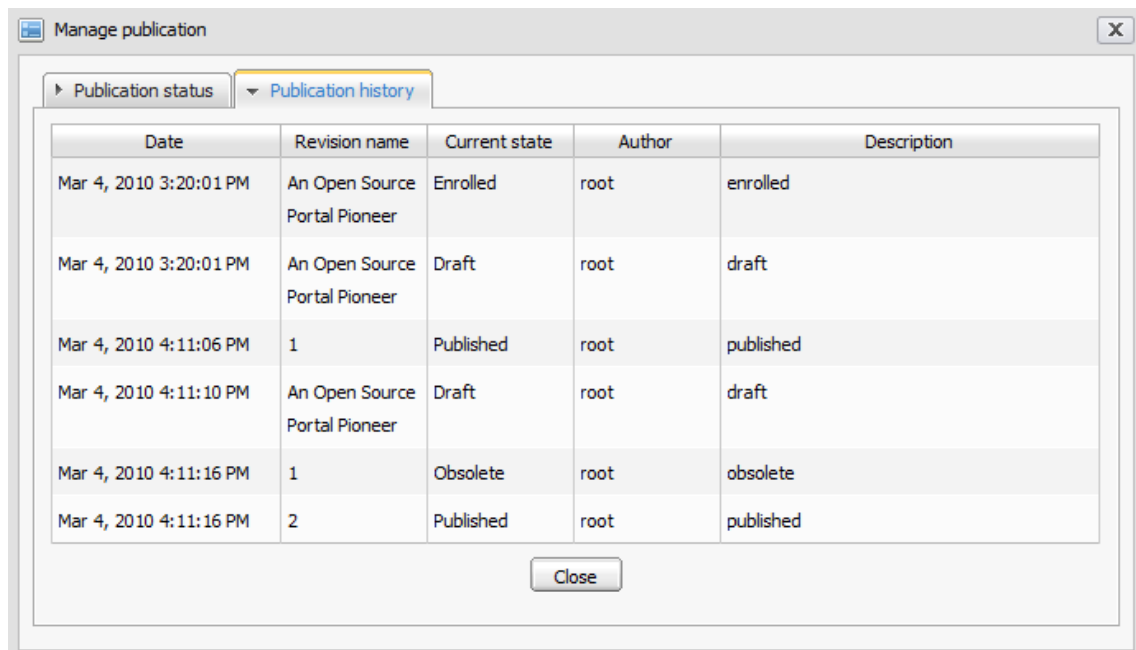


to view the content of the node or click



to restore a version (refer to [Section 4.6.4.16, “Manage Versions”](#) for information about versioning)

- 4. Select the **History** tab to view the publication history of the node..



- Click **Save** to commit any changes made.



### Important

See [Section 4.3.3, “Publication Process”](#) to understand more Manage Publication

## 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 4.41. Add a relation

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

- Click the



on the action bar.

The **Add relation** form appears.

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

4. 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 4.42. Delete a relation

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

2. Click



on the action bar.

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

4. Click



corresponding to the relation you want to remove.

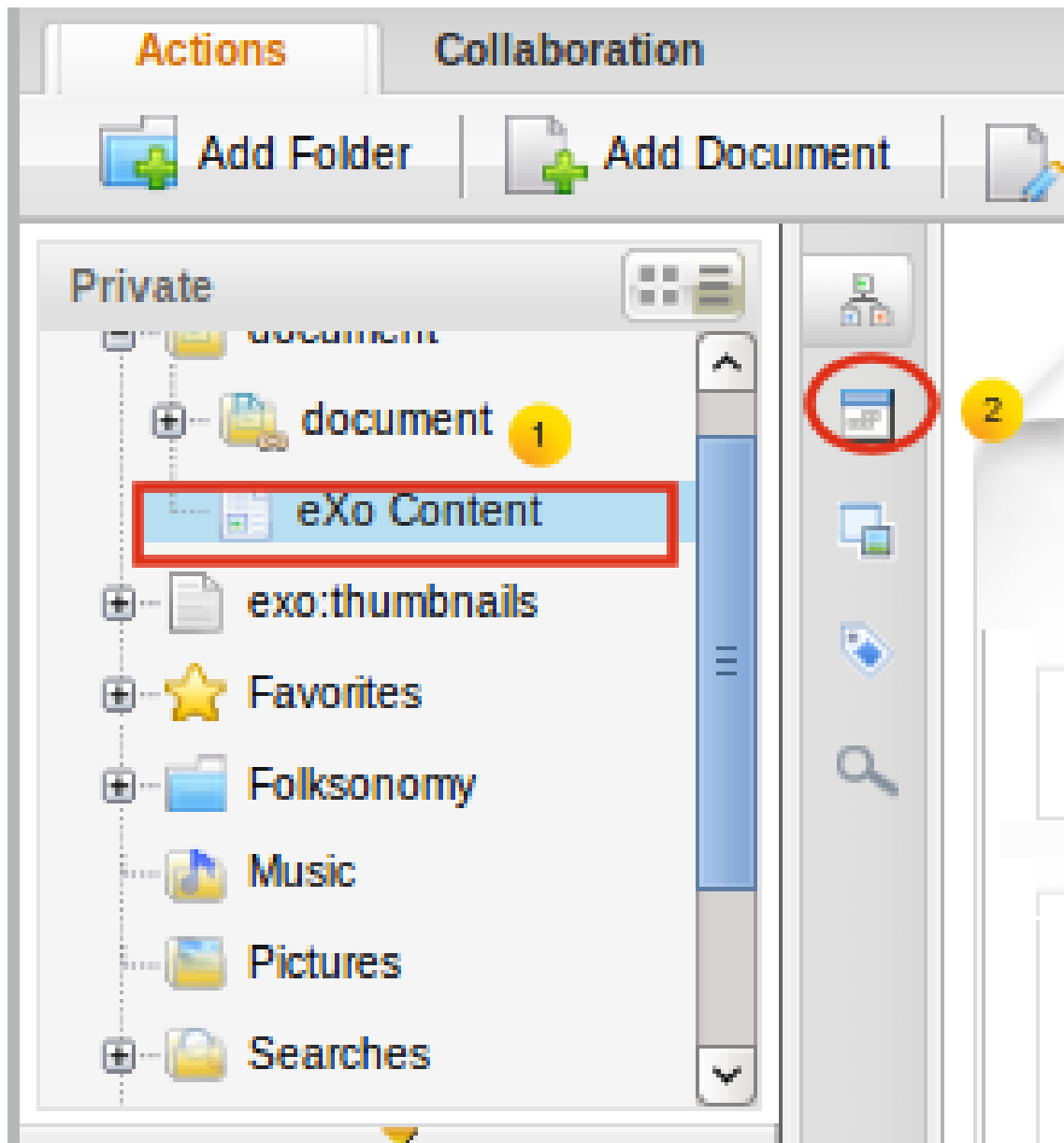
5. Click **OK** on the confirmation message to delete the relation.

The related document will be removed from the list.

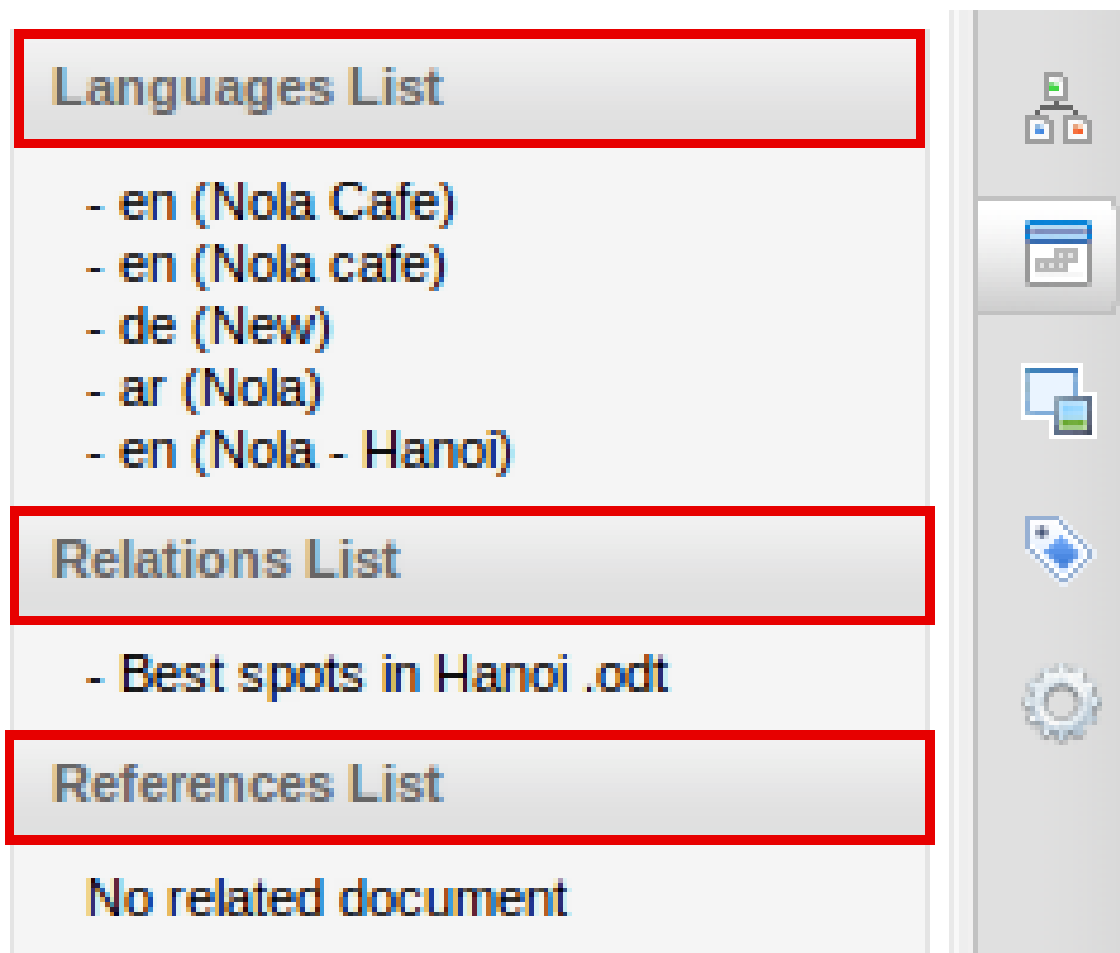
#### 4.6.4.15.3. View Relations

### Procedure 4.43. View Relations

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 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

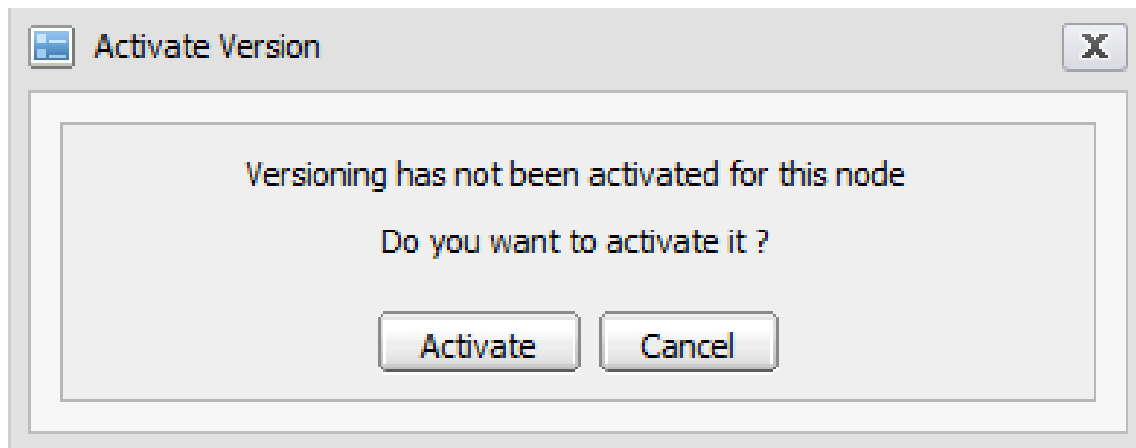
#### Procedure 4.44. Add version

1. Select a node to add a version to.
2. Click

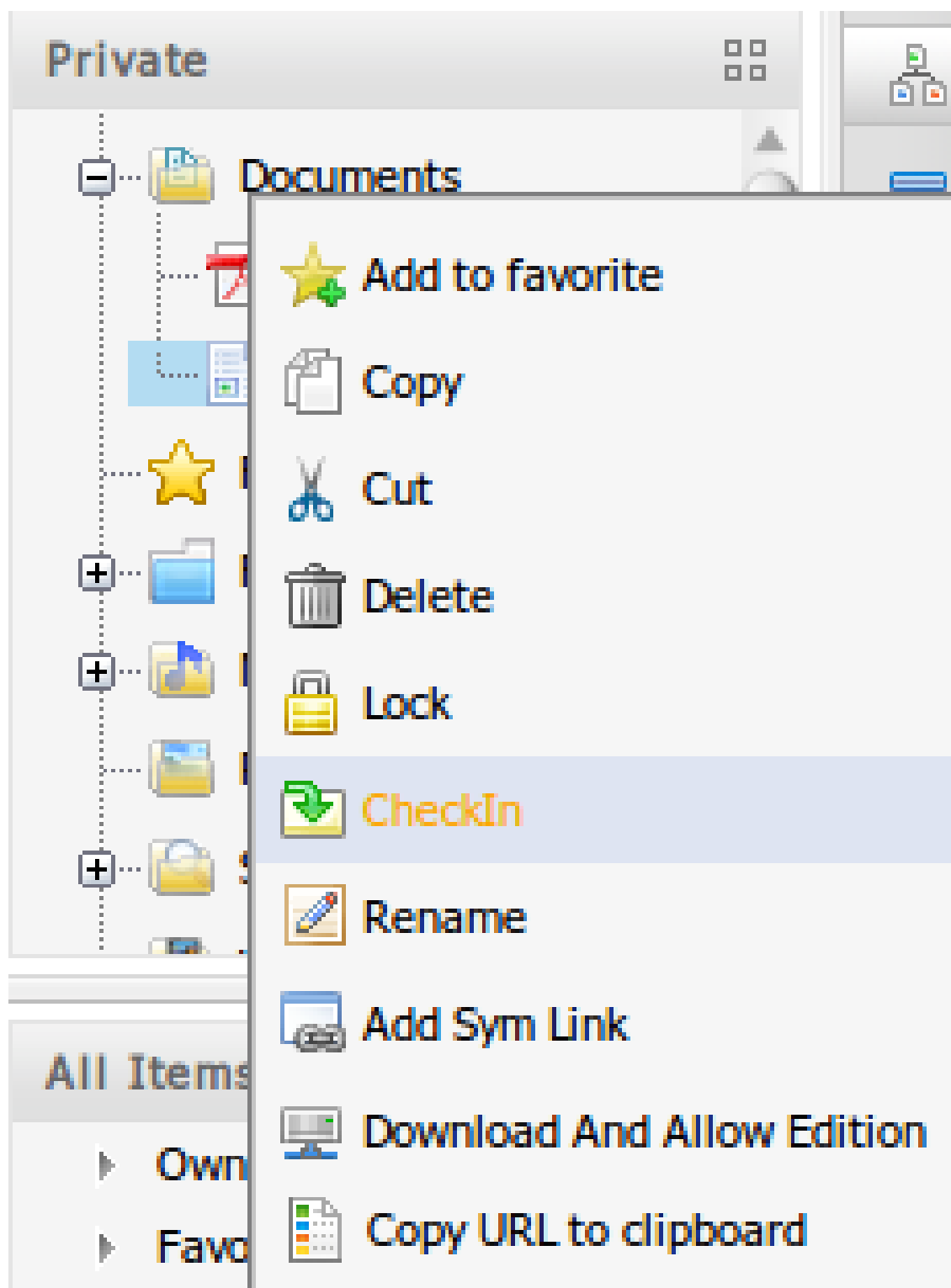


on the action bar.

The following message box will appear:



3. Click **Activate** to activate a version for the node.
4. Right-click the selected node and select **CheckIn** from the right menu:



5. Click



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



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

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



### Note

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 the selected node above and select **Check In** and then **Check Out**.

#### 4.6.4.16.2. Add and Remove labels for Versions

##### Procedure 4.45. Add a label

1. Select a versioned node.
2. Click



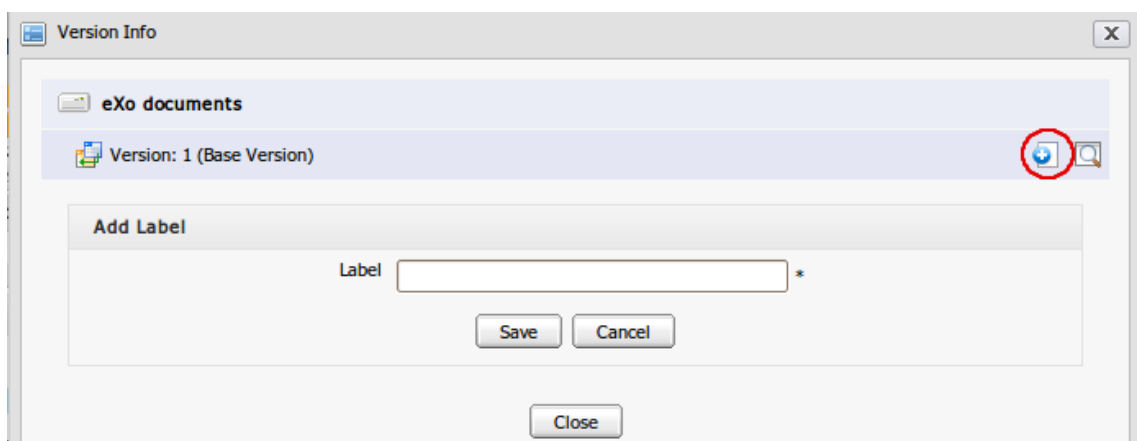
on the action bar.

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 4.46. Remove a label

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

2. Click



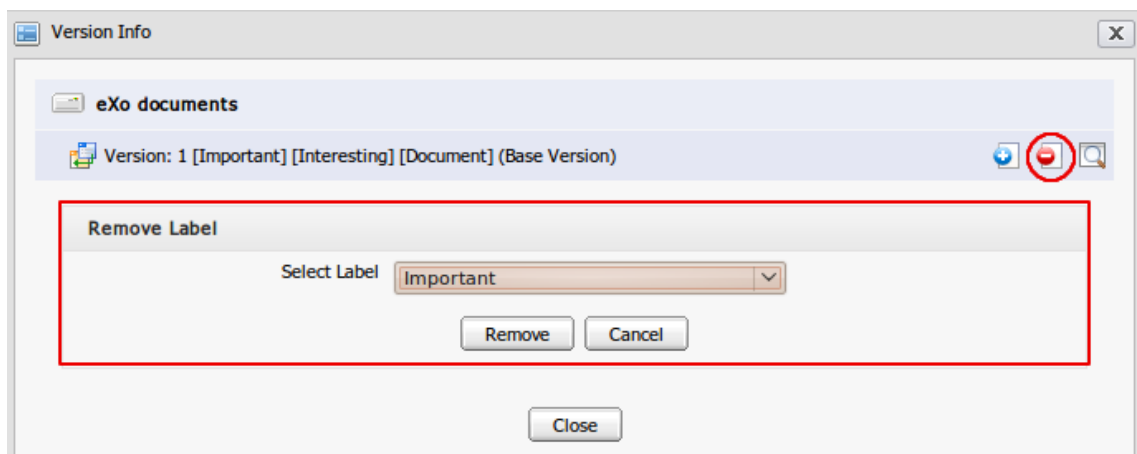
on the action bar.

3. Click

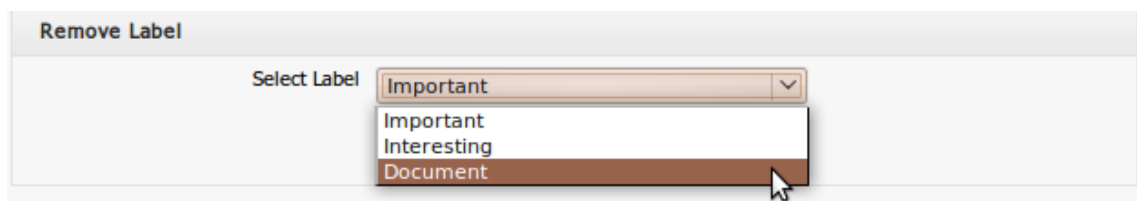


the

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 4.47.

1. Select a versioned node.

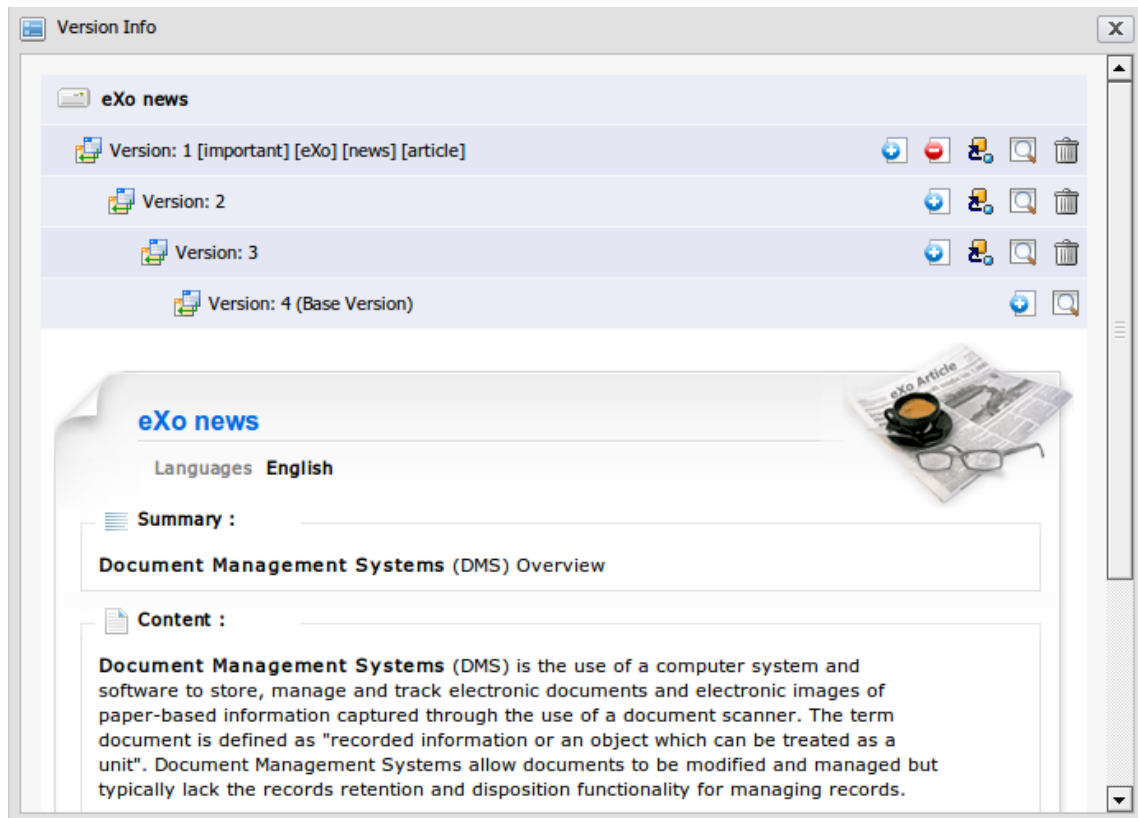
2. Click



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 4.48.

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

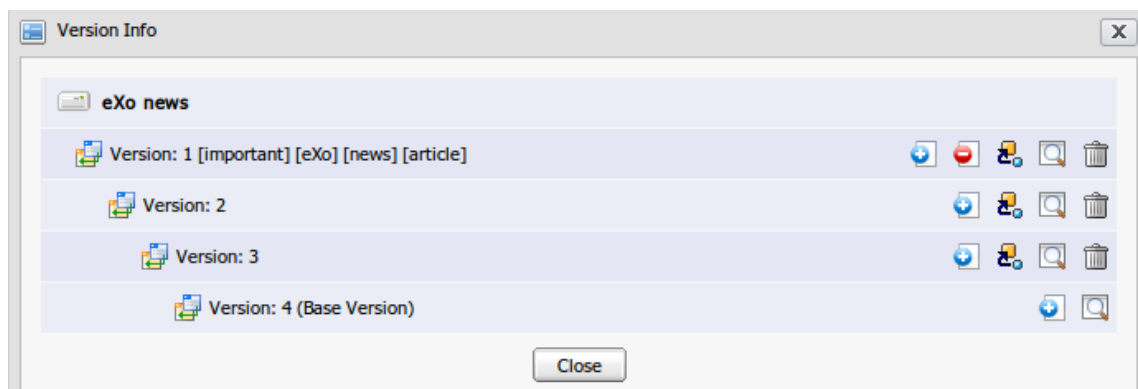


to restore the selected version

### 4.6.4.16.5. Delete versions

#### Procedure 4.49.

1. Select a node with at least two versions:



2. Click



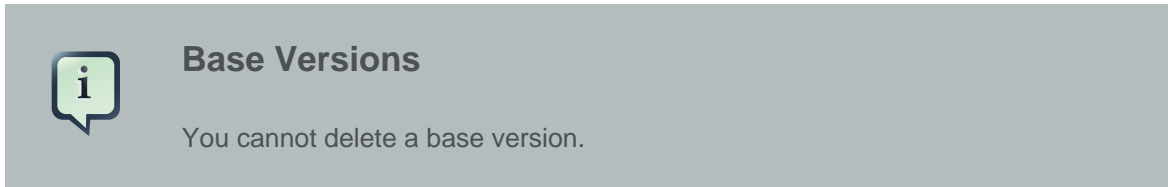
3. Click the



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.



#### 4.6.4.17. Multi Languages

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

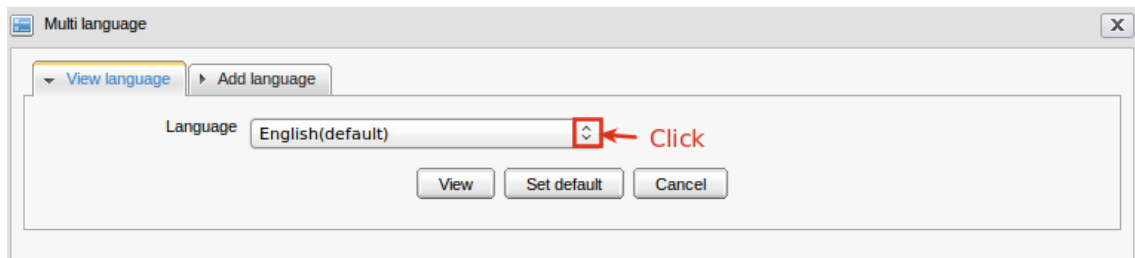
#### Procedure 4.50.

1. Select a document that you want to add language(s).
2. 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.

3. 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:

Language: ----

Set default: ☐



Title: Sample node \*

Name: sample-node \*

Description: One of the best coffeshop in Hanoi

Date: 05/19/2010

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

Upload image:  

Mime Type: image/jpeg

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

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

Save Cancel

this area is shown differently, depends on the filetype.

4. 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.

Language: ----

Set default: ☐ Tick to set default

Click

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

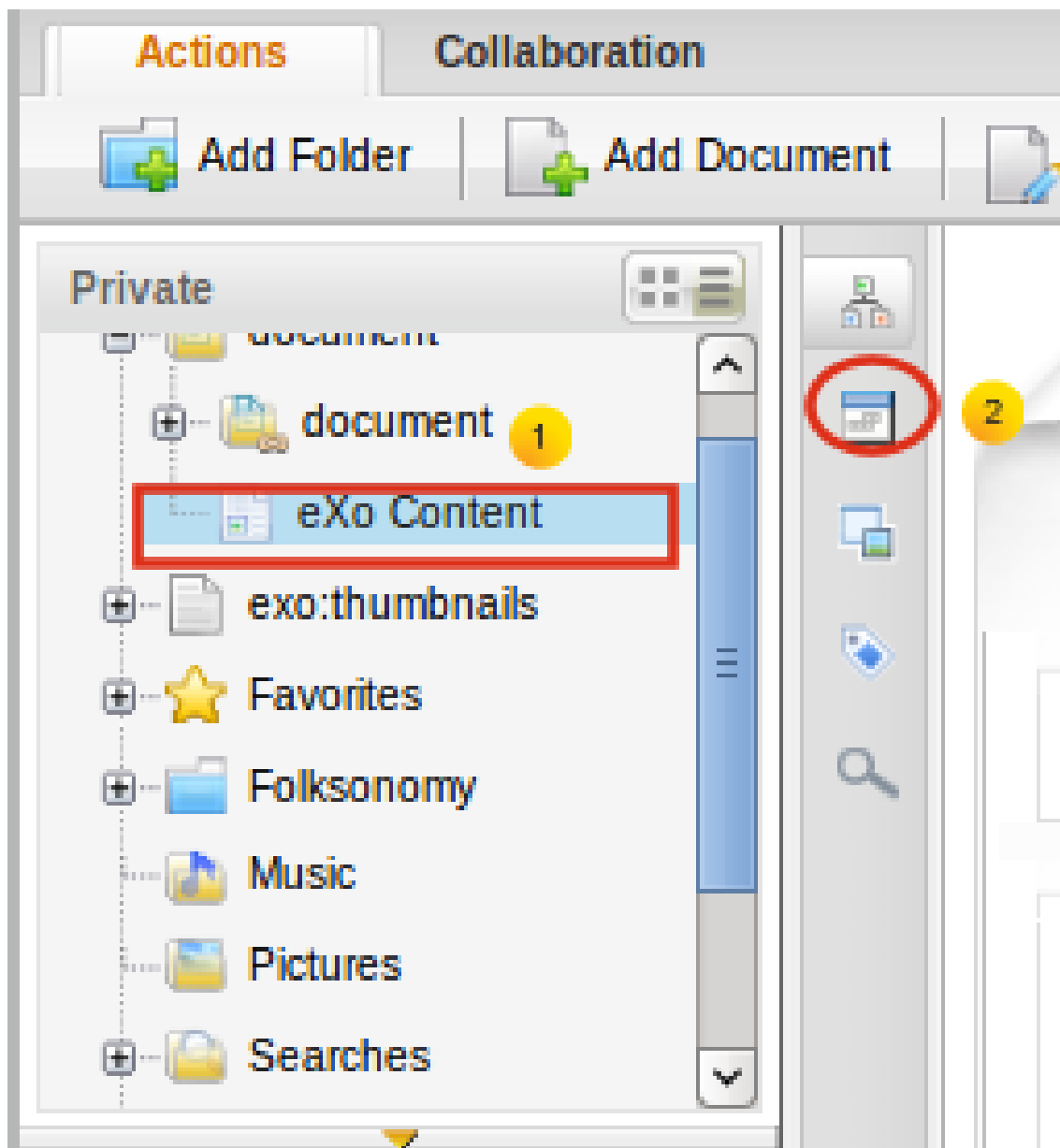
5. Click **Save**, you will be returned to the **View language** tab. Your selected language is now added to the **Language** field:

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

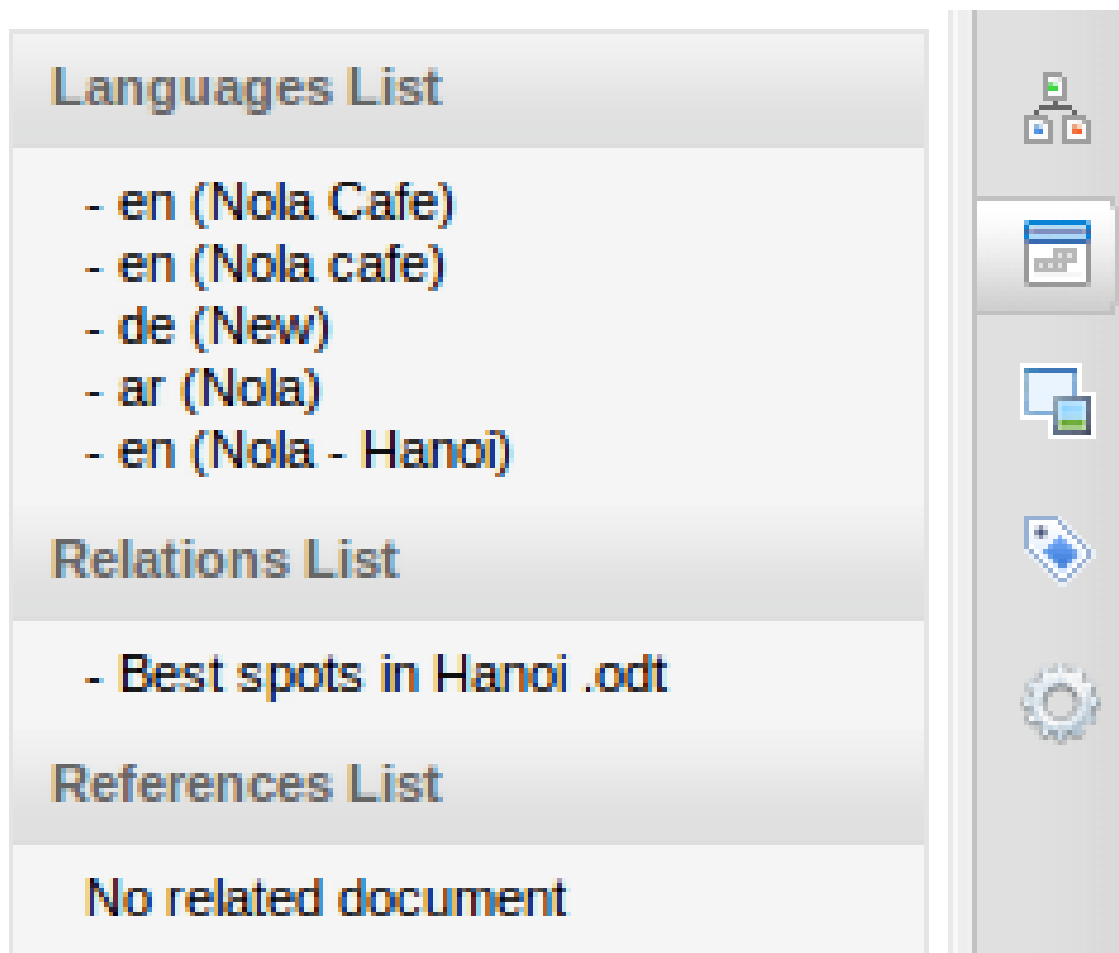
To view the languages list of a document, do the following:

#### Procedure 4.51. View the language list

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, do the following

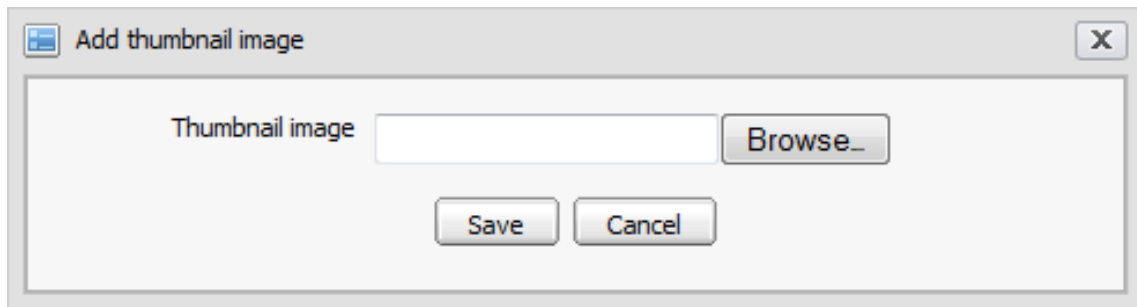
### Procedure 4.52. Overload thumbnails

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

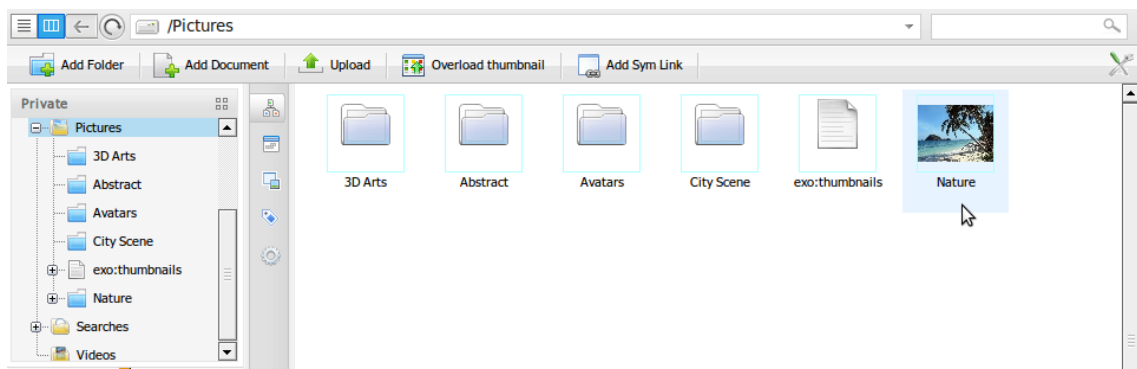


on the Action Bar.

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 stored in an *exo:thumbnails* folder.



#### 4.6.4.19. Request Approval

When a content is created, if you want to publish it but you do not have the right to publish the content, you must send an approval request for your content.

Do the following:

### Procedure 4.53. Request Approval

1. Select a content that you want to send an approval request to publish.
2. Click the **Request Approval** button on the action bar.

The content is displayed at the bottom of the Content Explorer of the people who have the right to approve contents.

### 4.6.4.20. Approve Content

When a content is created by users, it maybe need approved to publish if there is a approval request. To approve a content, do the following:

#### Procedure 4.54. Approve a content

1. Select a content that needs approving.
2. Click the **Approve Content** button on the action bar and the content is ready to be published.



#### Note

The Approve Content button is only invisible for users who have the right to approve contents.

By default, the button is not displayed on the action bar.

Enable this function by navigating to **Administration > Content Presentation > Manage Views**. See [Section 5.3.2.3, “Manage Views”](#) to know how to add the Approve Content button to the tabs on the action bar in Content Explorer.

### 4.6.4.21. Publish Content

After the content is approved, it can be published by the people who have the permission to publish contents.

Do the following:

#### Procedure 4.55. Publish a content

1. Select a content that you want to publish.
2. Click the **Publish Content** button on the action bar. The content will be published as the schedule that you set up.



#### Note

The Publish Content button is only invisible for users who have the right to publish contents.

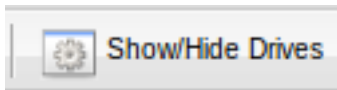
By default, the button is not displayed on the action bar.

Enable this function by navigating to **Administration > Content Presentation > Manage Views**. See [Section 5.3.2.3, “Manage Views”](#) to know how to add the Publish Content button to the tabs on the action bar in Content Explorer.

#### 4.6.4.22. Show Drives

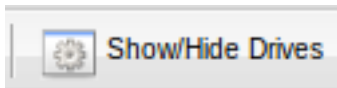
This function enables you to show or hide all the drives in Content Explorer.

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



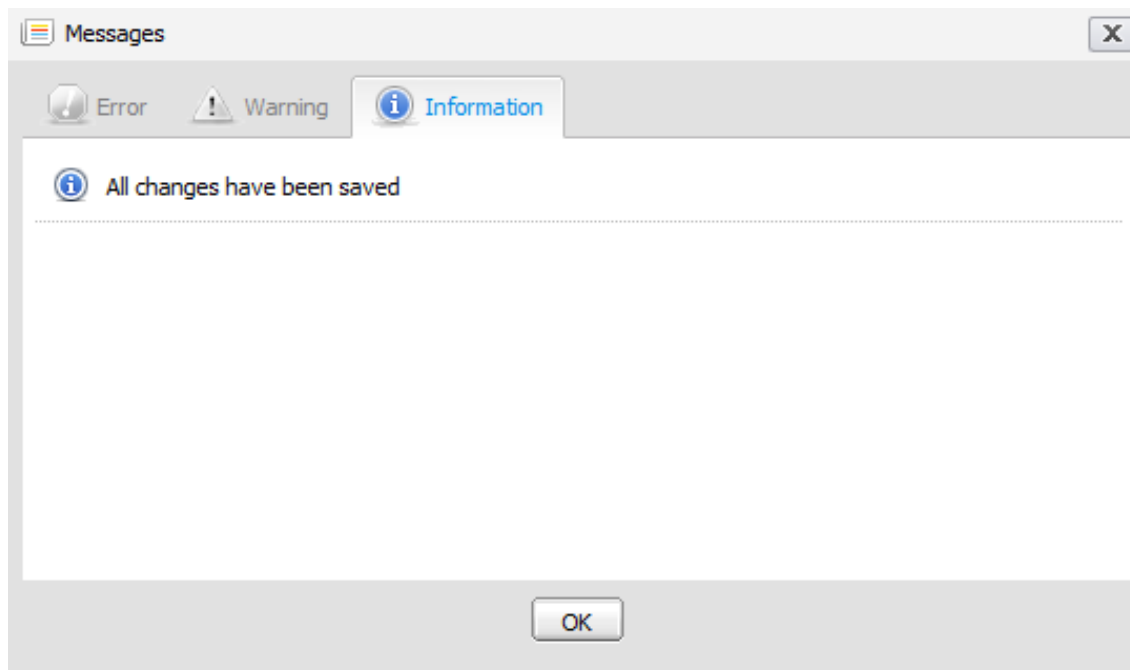
.

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 4.56. Add a new tag for a document

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

#### 2. Click



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

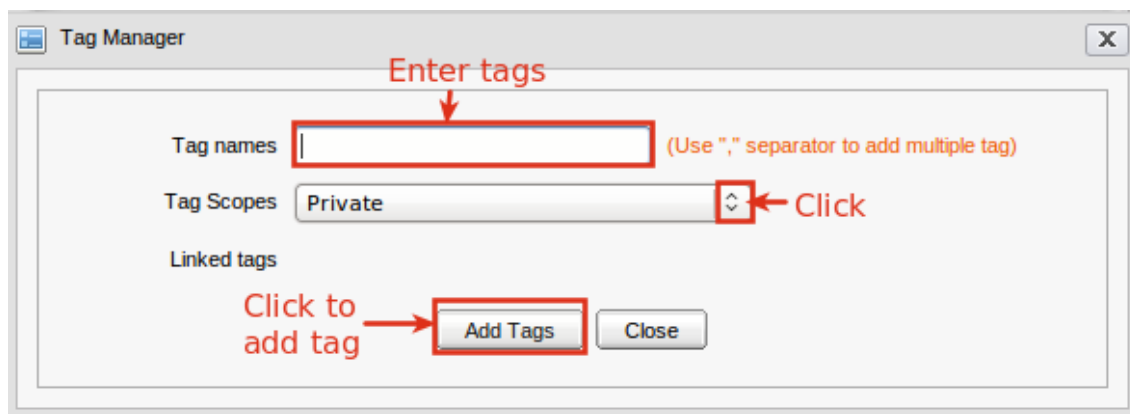


Table 4.14.

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.

### Procedure 4.57. Remove tags from a document

1. Select a document with tags that you want to delete the tags.
2. Click



on the action bar to open the Tag Manager form.

3. Click



corresponding to the tags you want to delete.

4. Click **OK** on the confirmation message to delete the tags.

### 4.6.4.25. Upload files into folders

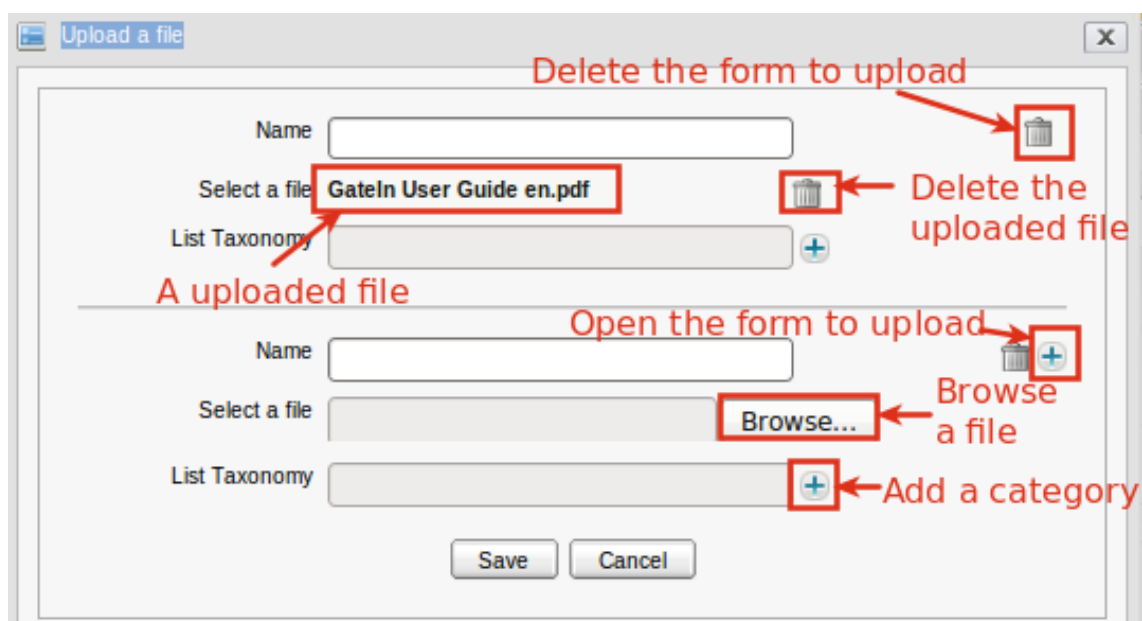
This function supports you to upload a file from your machine. All file types can be uploaded. The uploaded file's name must not include some special characters (! @ \$ % & + [ ])

#### Procedure 4.58. 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:



The screenshot shows the 'Upload a file' dialog box. It contains two sections for uploading files. The top section has a 'Name' field, a 'Select a file' field containing 'GateIn User Guide en.pdf', and a 'List Taxonomy' field with a '+' button. The bottom section has a 'Name' field, a 'Select a file' field with a 'Browse...' button, and a 'List Taxonomy' field with a '+' button. At the bottom are 'Save' and 'Cancel' buttons. Red annotations with arrows point to various elements: 'Delete the form to upload' points to a trash icon in the top right; 'Delete the uploaded file' points to a trash icon next to the 'Select a file' field in the top section; 'A uploaded file' points to the 'GateIn User Guide en.pdf' text; 'Open the form to upload' points to a '+' button in the top right; 'Browse a file' points to the 'Browse...' button; and 'Add a category' points to the '+' button in the bottom right.

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



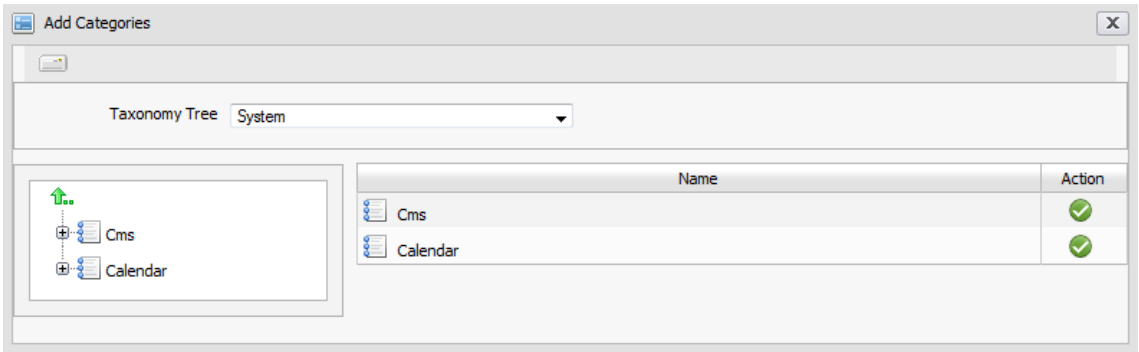
icon and select **Browse...** again to select another one.


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

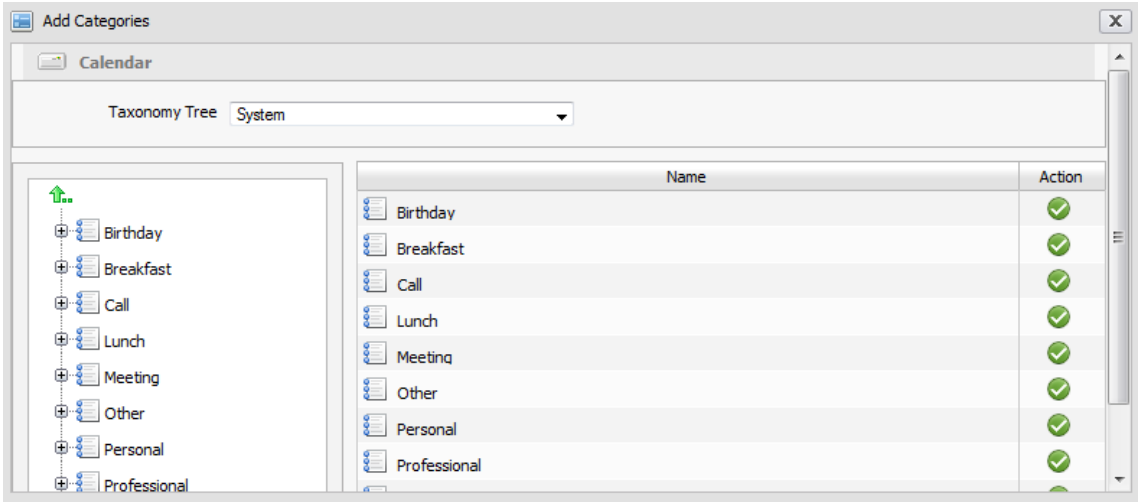


icon next to the List Taxonomy field to add categories for this file:



8. Select categories by clicking the 

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



**Note**

You can add more categories for a file by clicking the



icon again to open the Add Categories form.

Click the

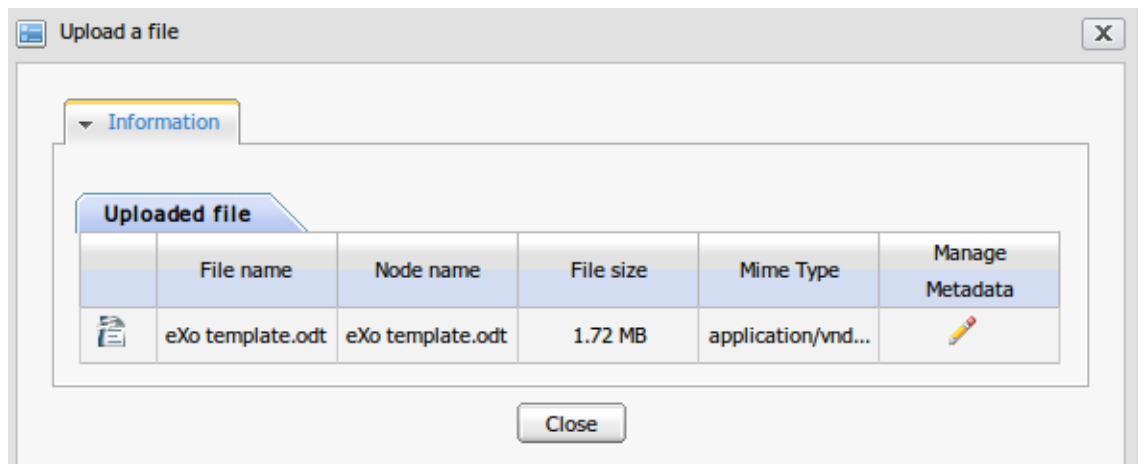



icon to delete a category in **Upload a file** form.

You also manage categories which were added to files by using the **Manage Categories** function. See [Section 4.6.4.12, "Manage Categories"](#).

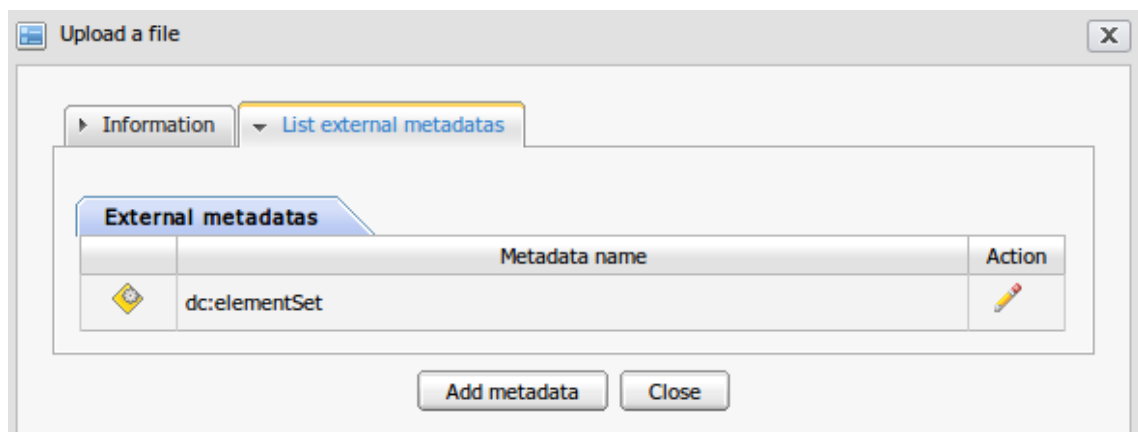
9. Complete uploading file by clicking **Save**.

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

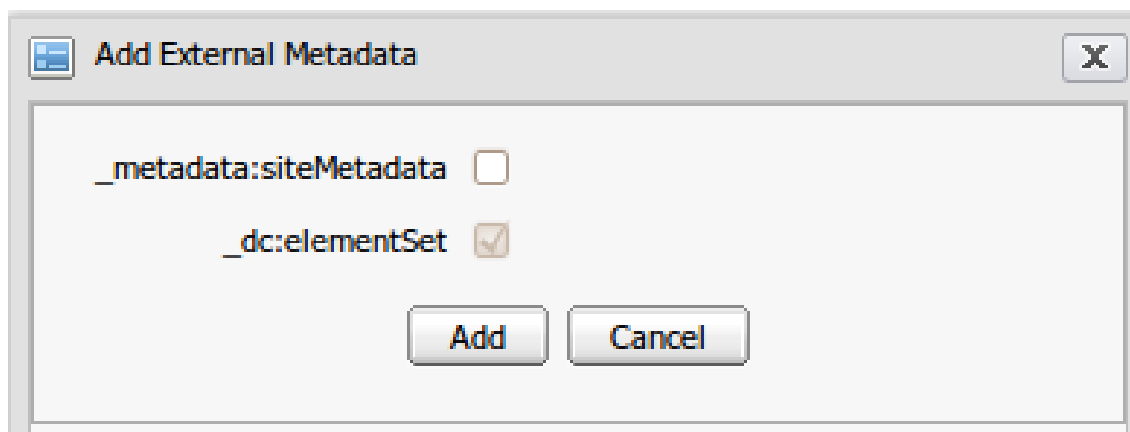


11. Click  the

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



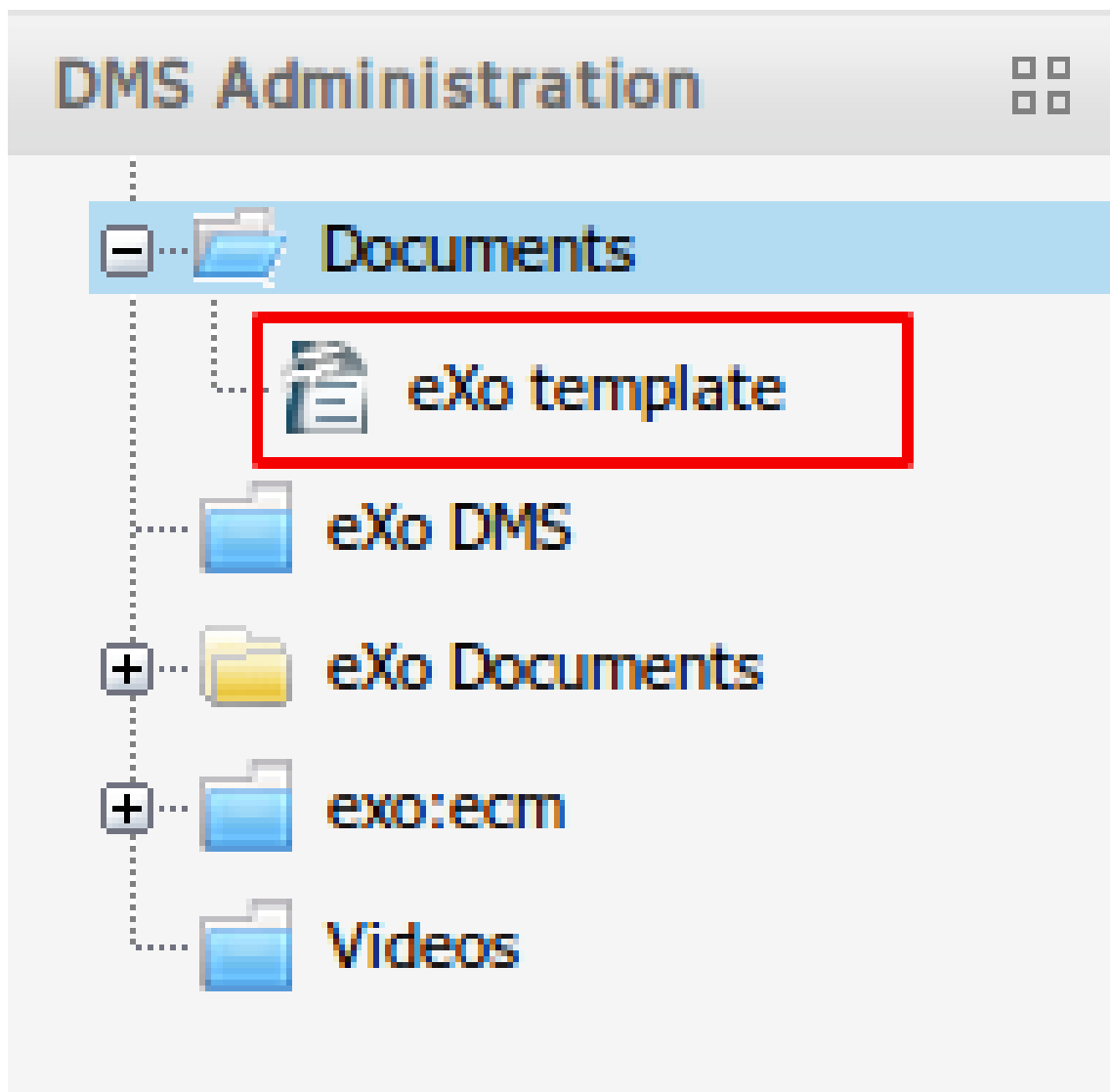
12. Click **Save** to accept changes or **Cancel** to quit without any changes.
13. Data can be added for the uploaded file. Check the checkbox, then click **Add**, or **Cancel** to quit without adding anything.



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



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 Content Explorer. If your file size exceeds the limit, a pop-up message will appear to alert you.

#### 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)

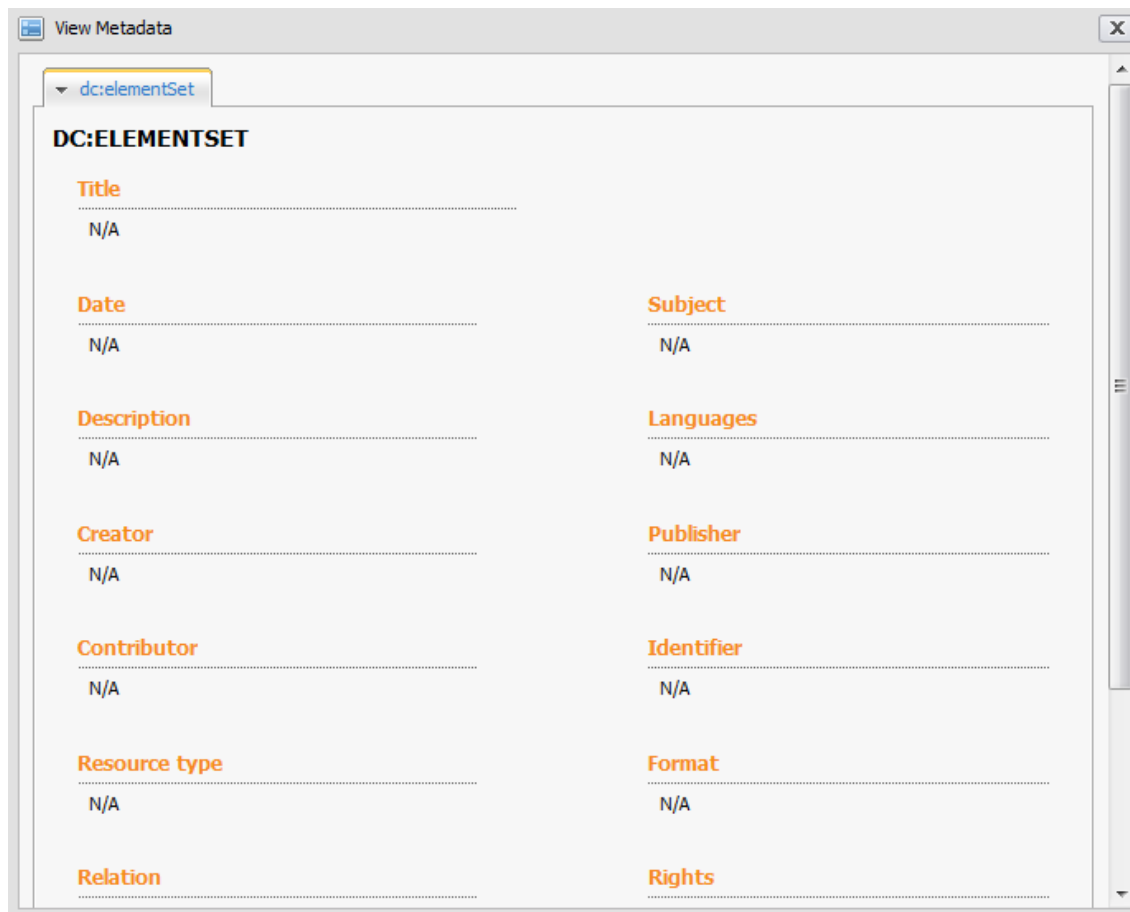
#### Procedure 4.59.

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

2. Click



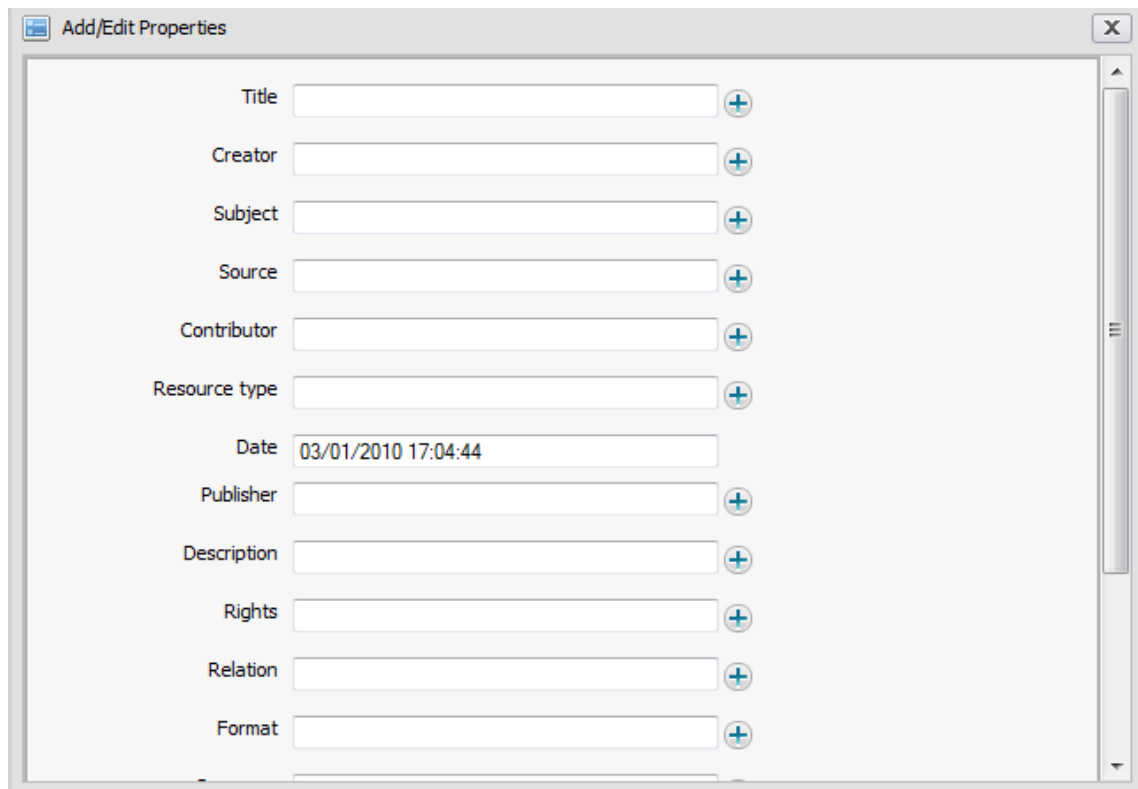
. The **View Metadata** form appears:

A screenshot of the "View Metadata" form. The window title is "View Metadata". Inside, there's a tab labeled "dc:elementSet". Below the tab, the form is titled "DC:ELEMENTSET". It contains a grid of 14 fields, each with a label in orange and a value of "N/A". The fields are: Title, Date, Description, Creator, Contributor, Resource type, Relation, Subject, Languages, Publisher, Identifier, Format, and Rights. The form has a scrollbar on the right side.

3. Click the **Add/Edit** button at the bottom of the **View Metadata** form to add metadata.
4. Complete the desired fields in the **Add/Edit Properties** form. Click



to add further metadata.



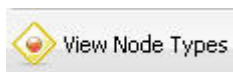
5. Click **Save** to commit the new metadata values.

#### 4.6.4.27. View Node Types

To view detailed information about a node:

#### Procedure 4.60.

1. Select a node that you want to its detailed inforamtion.
2. Click



to view detailed information about the selected node.

NodeType Information

exo:article | exo:modify | exo:datetime | exo:ownable | mix:votable | mix:commentable

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

**Node Property Definition**

Name	Type	Man	Pr	AC	Mul	DV	CV
jcr:uuid	String	✓ true	✓ true	✓ true	✗ false		
exo:text	String	✗ false	✗ false	✗ false	✗ false		
exo:summary	String	✗ false	✗ false	✗ false	✗ false		
exo:title	String	✓ true	✗ false	✗ false	✗ false		
jcr:mixinTypes	Name	✗ false	✓ true	✗ false	✓ true		
jcr:primaryType	Name	✓ true	✓ true	✓ true	✗ false		

**Child Node Definition**

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

Close

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

### 4.6.4.28. View Permissions

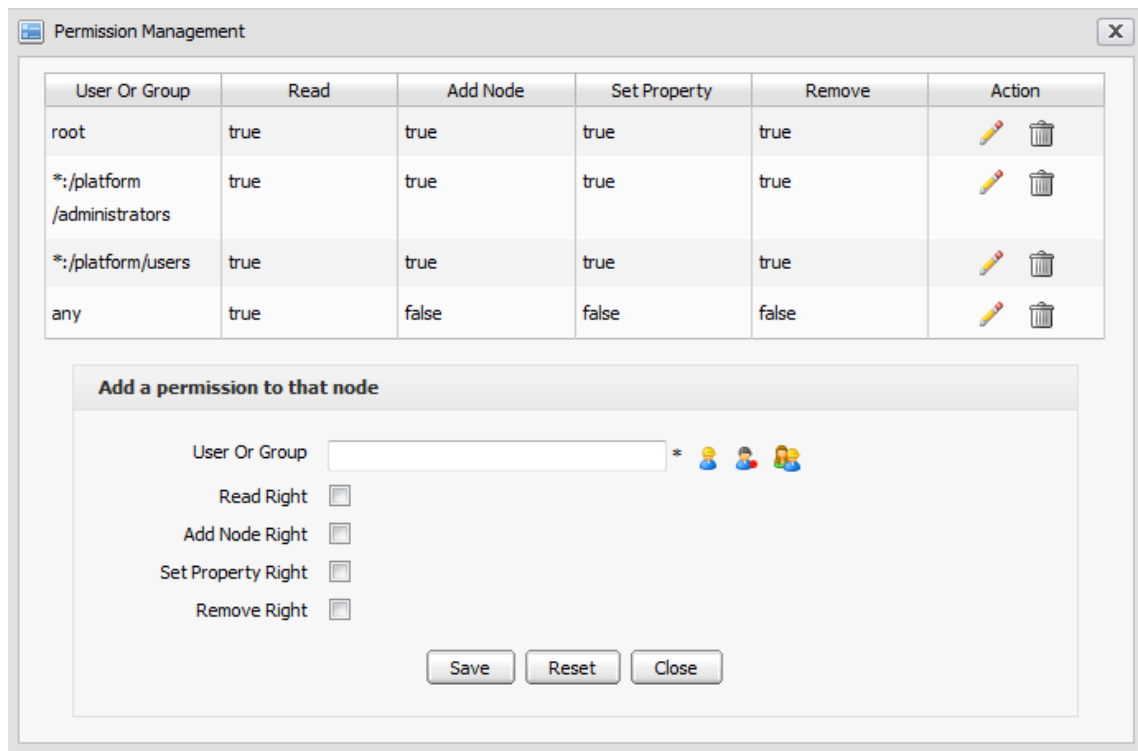
This function enables an administrator to manage the permissions for nodes.









#### Procedure 4.61. View Permissions

- Select a node.
- Click






- The **Permissions Management** form appears.



User Or Group	Read	Add Node	Set Property	Remove	Action
root	true	true	true	true	 
*:/platform /administrators	true	true	true	true	 
*:/platform/users	true	true	true	true	 
any	true	false	false	false	 

**Add a permission to that node**

User Or Group  \*   

Read Right ☐

Add Node Right ☐

Set Property Right ☐

Remove Right ☐

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

## Procedure 4.62. 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

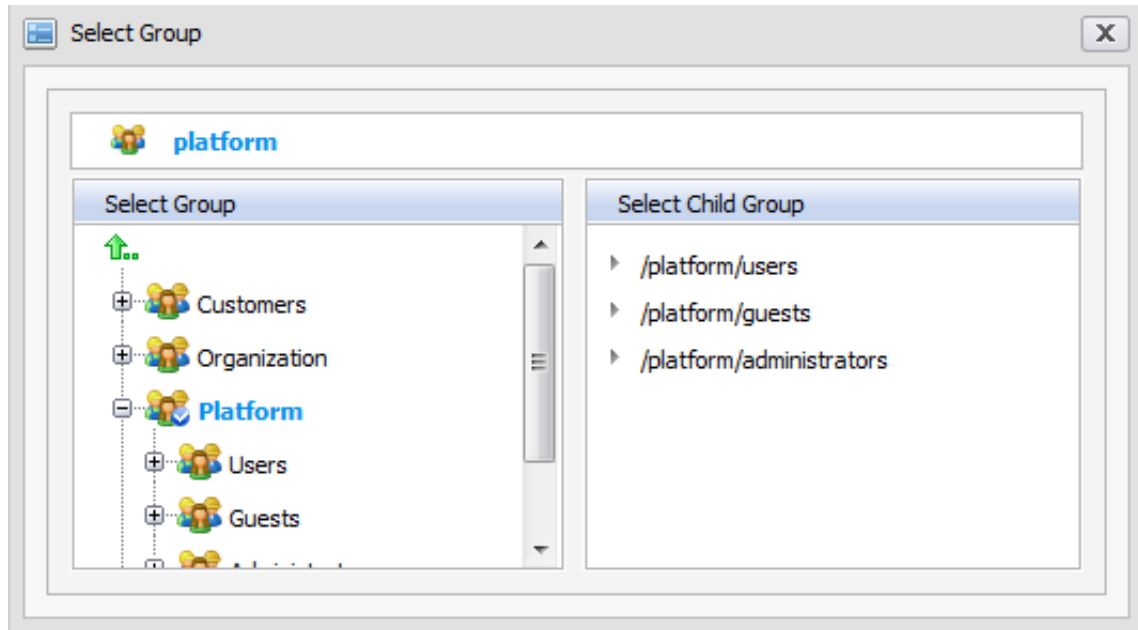
Enter a group name in the **Group** field at the top of the form (for example; **/platform/users**). All users in the nominated group will be displayed.

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 membership** 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 4.63. 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 4.64. Delete Permissions

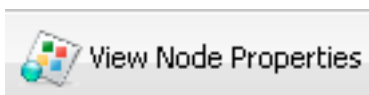
1. Select the permission of a user or a group in the table of list permissions.
2. Click the  
 icon.
3. Click **OK** in the confirmation message to remove the permission or **Cancel** to quit.

#### 4.6.4.29. View Properties

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

### Procedure 4.65.

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

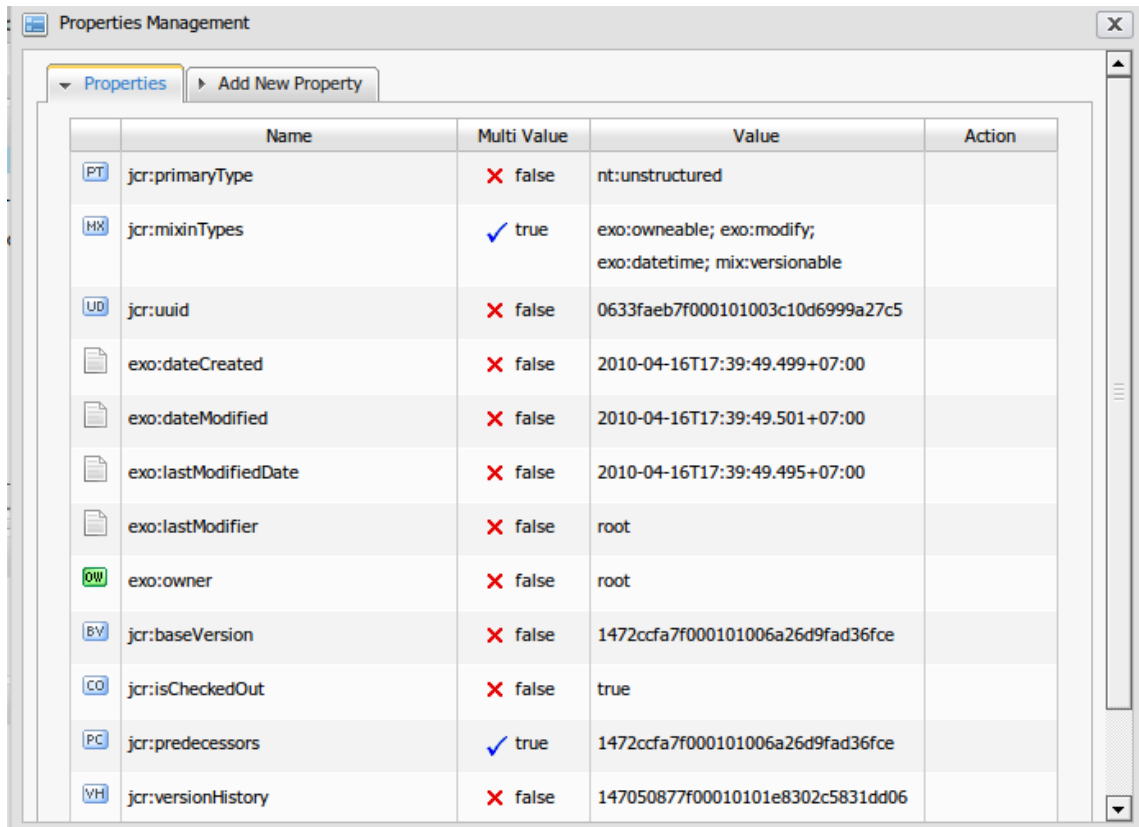


button to show the **Properties Management** form:

This form has two tabs:

Properties

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

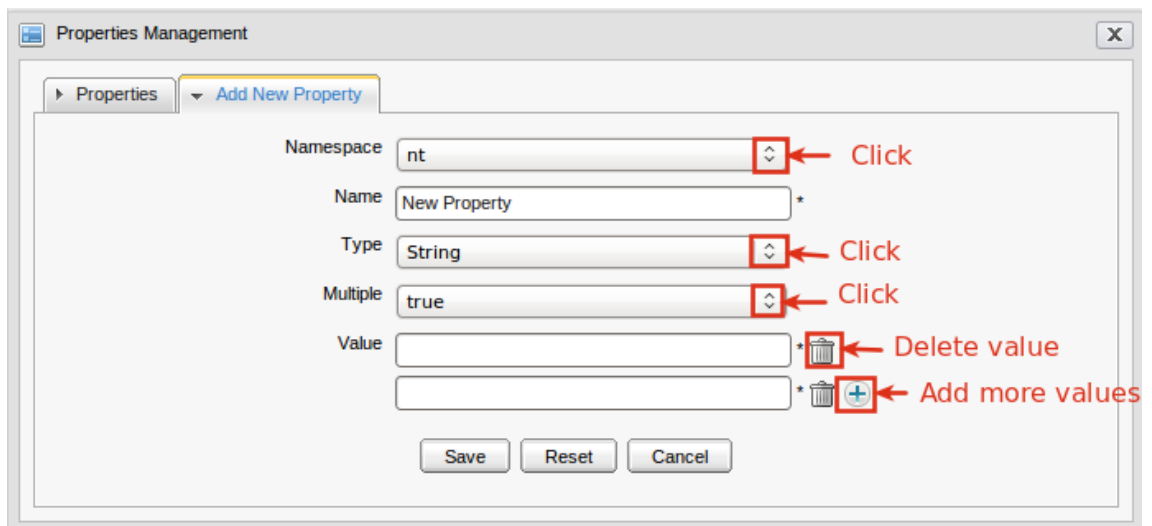


	Name	Multi Value	Value	Action
PT	jcr:primaryType	✗ false	nt:unstructured	
MX	jcr:mixinTypes	✓ true	exo:owneable; exo:modify; exo:datetime; mix:versionable	
UD	jcr:uuid	✗ false	0633faeb7f000101003c10d6999a27c5	
	exo:dateCreated	✗ false	2010-04-16T17:39:49.499+07:00	
	exo:dateModified	✗ false	2010-04-16T17:39:49.501+07:00	
	exo:lastModifiedDate	✗ false	2010-04-16T17:39:49.495+07:00	
	exo:lastModifier	✗ false	root	
OW	exo:owner	✗ false	root	
BV	jcr:baseVersion	✗ false	1472ccfa7f000101006a26d9fad36fce	
CO	jcr:isCheckedOut	✗ false	true	
PC	jcr:predecessors	✓ true	1472ccfa7f000101006a26d9fad36fce	
VH	jcr:versionHistory	✗ false	147050877f00010101e8302c5831dd06	

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

### Add New Property

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



Properties Management

Properties Add New Property

Namespace: nt ⌵ ← Click

Name: New Property \*

Type: String ⌵ ← Click

Multiple: true ⌵ ← Click

Value:  \* 🗑️ ← Delete value

\* 🗑️ ➕ ← Add more values

Save Reset Cancel

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

### 3. To add new properties:

Select the namespace for the property.

4. Enter a name for the new property in the **Name** field.
5. Select a **Type** for the property from the drop-down menu for the field Type.
6. Enter a value for the property in the **Value**.
7. To add multiple new values, click





and repeat the above steps.

- To remove a value, click



8. 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.

Properties Management				
<div> <div>Properties</div> <div>Add New Property</div> </div>				
	Name	Multi Value	Value	Action
PT	jcr:primaryType	✗ false	nt:unstructured	
MX	jcr:mixinTypes	✓ true	exo:owneable; exo:modify; exo:datetime; mix:versionable	
UD	jcr:uuid	✗ false	0633faeb7f000101003c10d6999a27c5	
NEW	New Property	✓ true	root	 
	exo:dateCreated	✗ false	2010-04-16T17:39:49.499+07:00	
	exo:dateModified	✗ false	2010-04-16T17:39:49.501+07:00	
	exo:lastModifiedDate	✗ false	2010-04-19T15:19:24.106+07:00	
	exo:lastModifier	✗ false	root	
OW	exo:owner	✗ false	root	
BV	jcr:baseVersion	✗ false	1472ccfa7f000101006a26d9fad36fce	
CO	jcr:isCheckedOut	✗ false	true	
PC	jcr:predecessors	✓ true	1472ccfa7f000101006a26d9fad36fce	

In this form you can edit a property by clicking



or delete it by clicking



### 4.6.4.30. View Relations

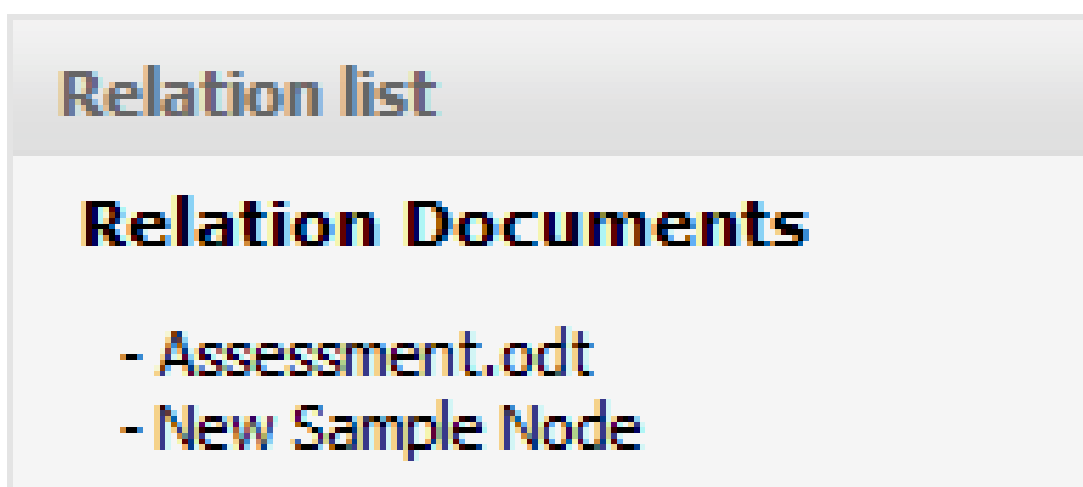
This function shows documents related to a selected node.

#### 1. To View Relations

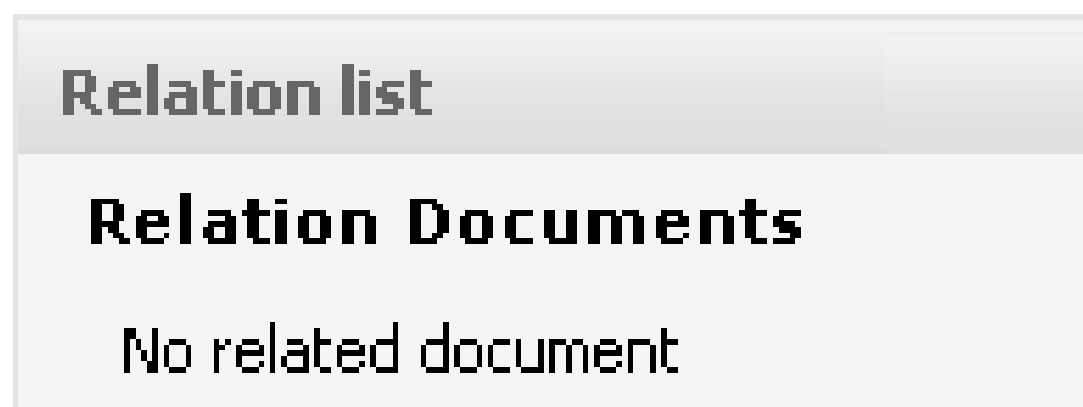
Select a node > Click



. 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.



#### 2. To Hide Relations

Click



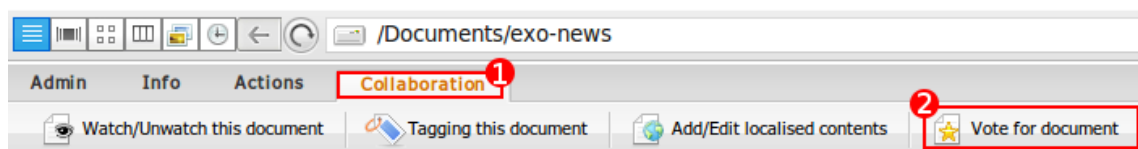
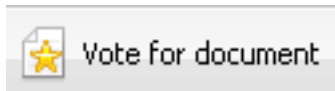
again to hide relations.

#### 4.6.4.31. Vote

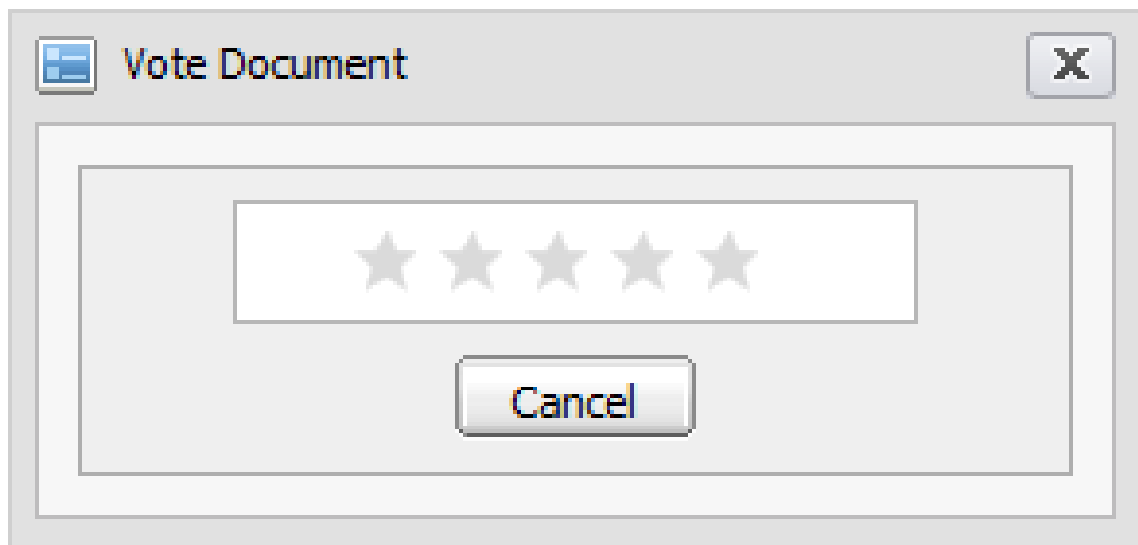
This function is used to vote for a document (Note: you cannot vote for a **File Plan** document).

#### Procedure 4.66.

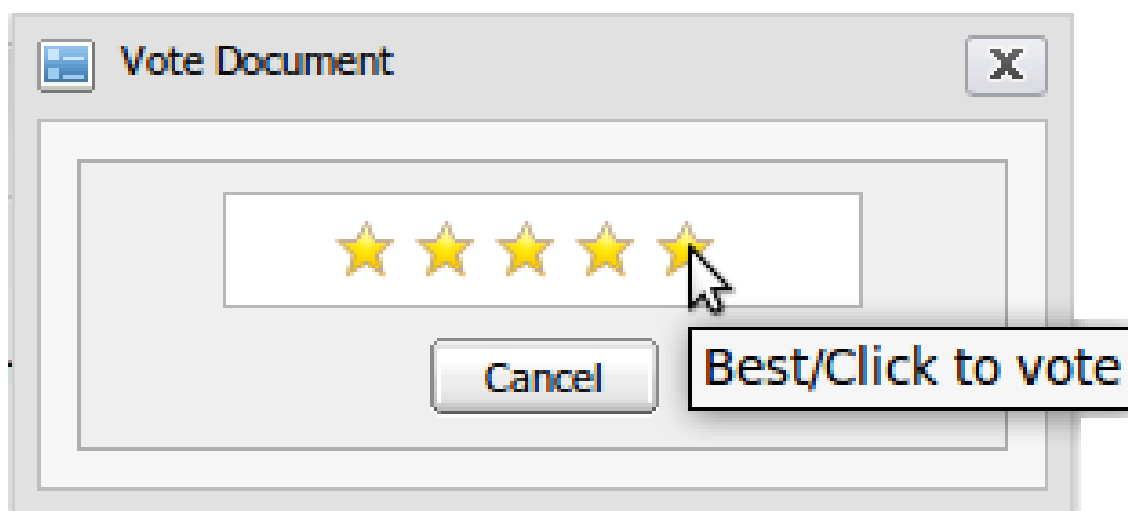
1. Open the document you want to vote for.
2. Click



The **Vote Document** form will appear:



3. 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:

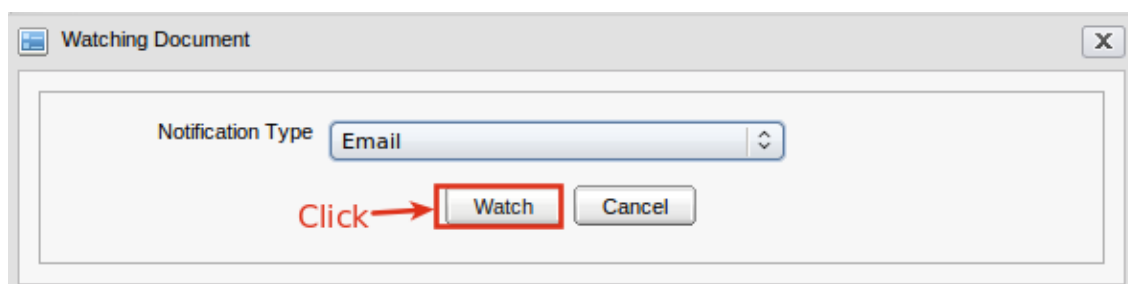


### 4.6.4.32. Watch Documents

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 4.67.

1. Select the document you want to watch.
2. 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 appear for you to confirm the action.

### 4.6.5. Manage Content In Content 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, and more. This section focuses on how to manage a web content in a specific site.



#### Note

Only users who have the right to access **Sites Management** drive can do it.

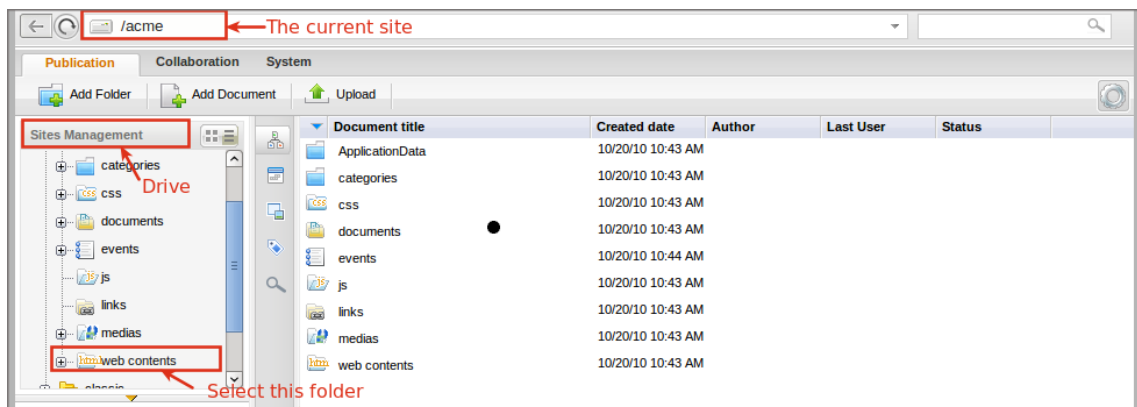
#### 4.6.5.1. Create a new web content

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

Do the following steps:

#### Procedure 4.68. Add new content

1. Go to **Sites Management** drive > select a site that you want to add a web content.
2. Select the web content folder on the left:

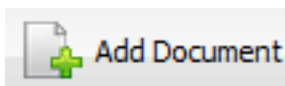


#### Note

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:

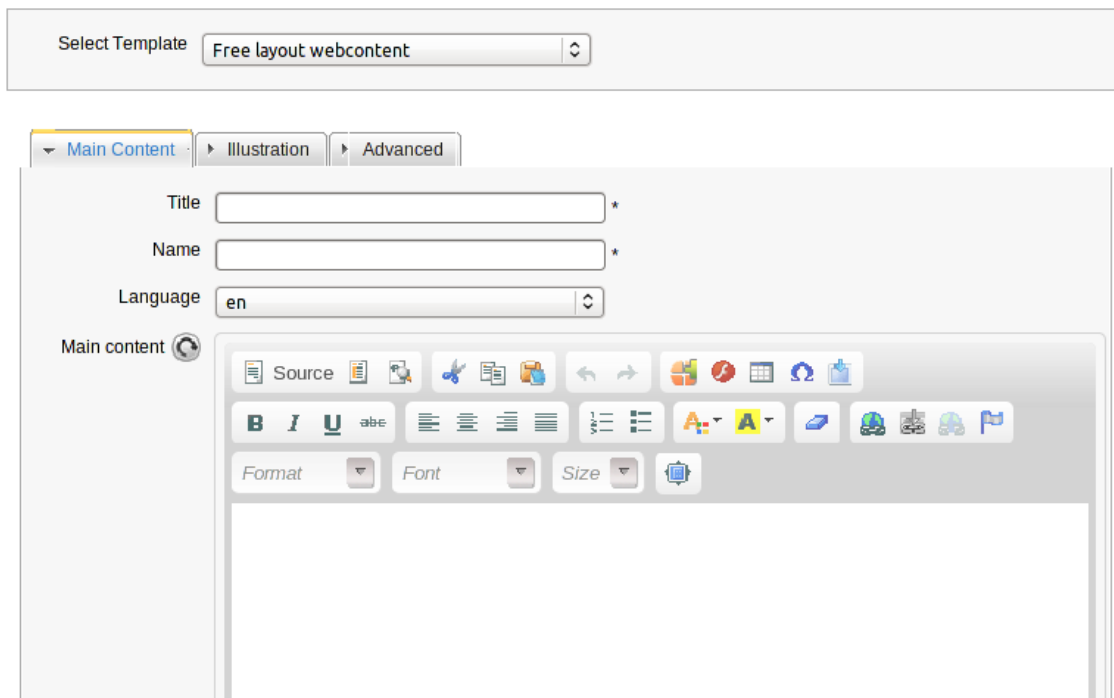
- Manage web content of a site more easily.
- You only may add a new web content in this folder so that you don't need to select a web content document in the list of document types. It makes adding a new web content more flexibly.

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 screenshot shows the "Add New Document" form. At the top, there is a "Select Template" dropdown menu with "Free layout webcontent" selected. Below this, there are three tabs: "Main Content", "Illustration", and "Advanced". The "Main Content" tab is active. It contains fields for "Title", "Name", and "Language". The "Language" field is set to "en". Below these fields is a "Main content" section with a circular refresh icon. This section contains a rich text editor with a toolbar featuring icons for source, undo, redo, bold, italic, underline, text color, background color, bulleted list, numbered list, link, unlink, and a flag icon. Below the toolbar are "Format", "Font", and "Size" dropdown menus. The main editing area is a large text box.

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.
5. Enter values in fields of the Add New Document form.
6. Click **Save as Draft** to save the content or **Cancel** to quit the Add New Document form.
7. **Tabs in the Add New Document form.**

The **Main Content** Tab includes:

**Table 4.15.**

Field	Options
Name	The name of a web content that you want to add new

Field	Options
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**: enables you to upload an illustration that makes the site's content more attractive

► Main Content ▾ **Illustration** ► Advanced

💡 In this panel, you can specify an image that will be shown when your web content is displayed in lists. In addition, you can specify some summary text to come with this image.

Illustration Image  **Browse...** ← Upload an image

summary

Source **B I U** [List Icons] [Quote Icon] [Image Icon]

Size [Dropdown] [Icon]

Save

**Save as Draft** Close

**Table 4.16.**

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

Field	Option
	listed. The main content will be shown when it is selected to be viewed

To upload an image do as follows:

**Procedure 4.69. Upload an image**

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 the list to upload.

The **Advanced** tab:

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

Select Template: Free layout webcontent

Main Content | Illustration | **Advanced**

**CSS data**

**JS data**

**Save as Draft** **Close**

**Informational text for CSS data:** In this panel, you can specify the main stylesheet for your web content. This style will override the one defined at the site level and at the shared level.

**Informational text for JS data:** In this panel, you can specify some Java Script code that can be executed before your web content is rendered.

**Table 4.17.**

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.

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

#### 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:

#### Procedure 4.70. Edit a web content

1. Go into the folder 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. The detailed information of web content will be viewed on the right panel.
3. Click



the action bar to show the edit form of the selected web content as the Add New Document form.

4. Change the current values in the 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 Administration portlet.

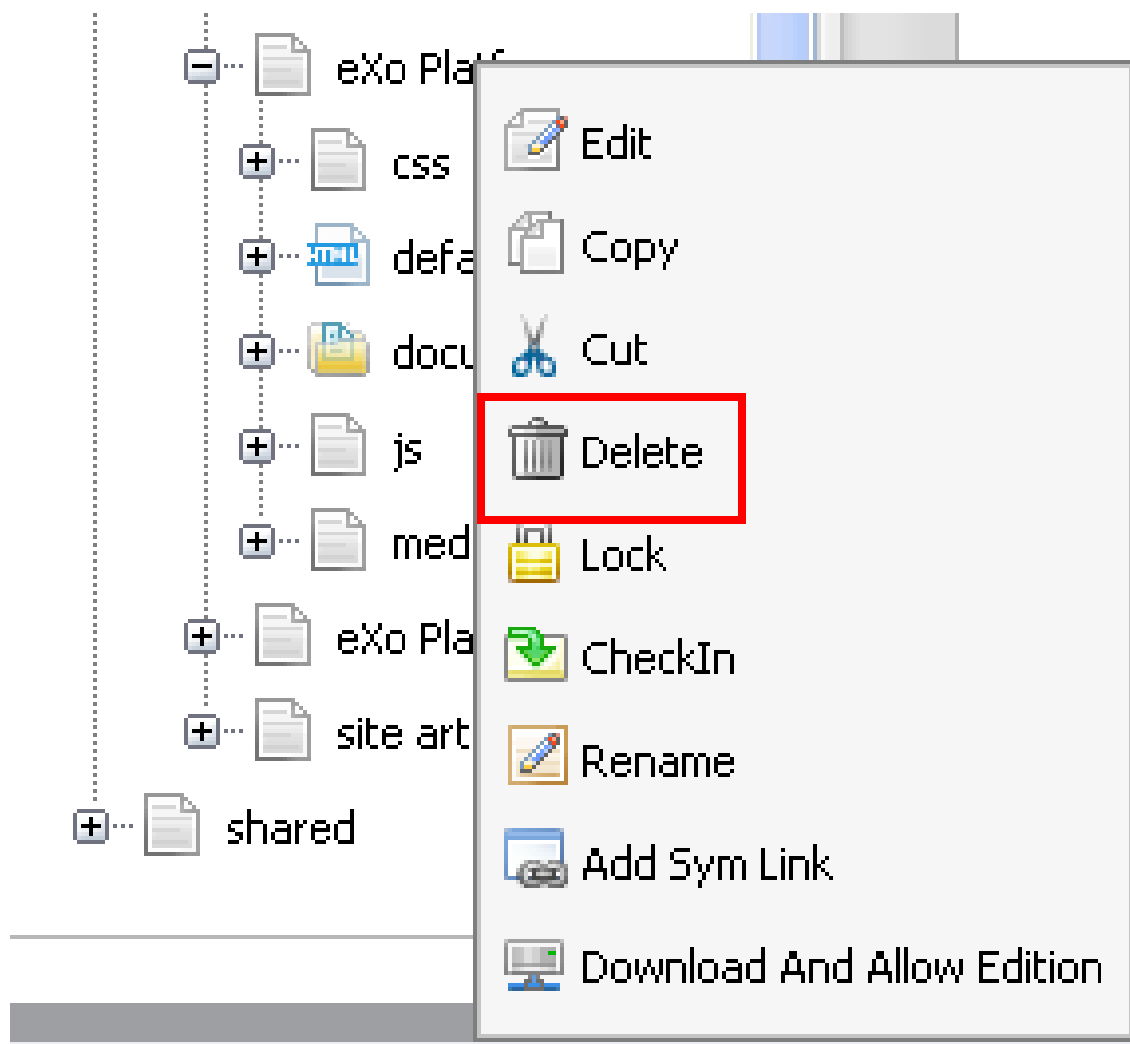
#### 4.6.5.3. Delete a web content

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 4.71. Delete a web content

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 Content Explorer.

See [Section 4.3.3, "Publication Process"](#) to know how to publish a web content.

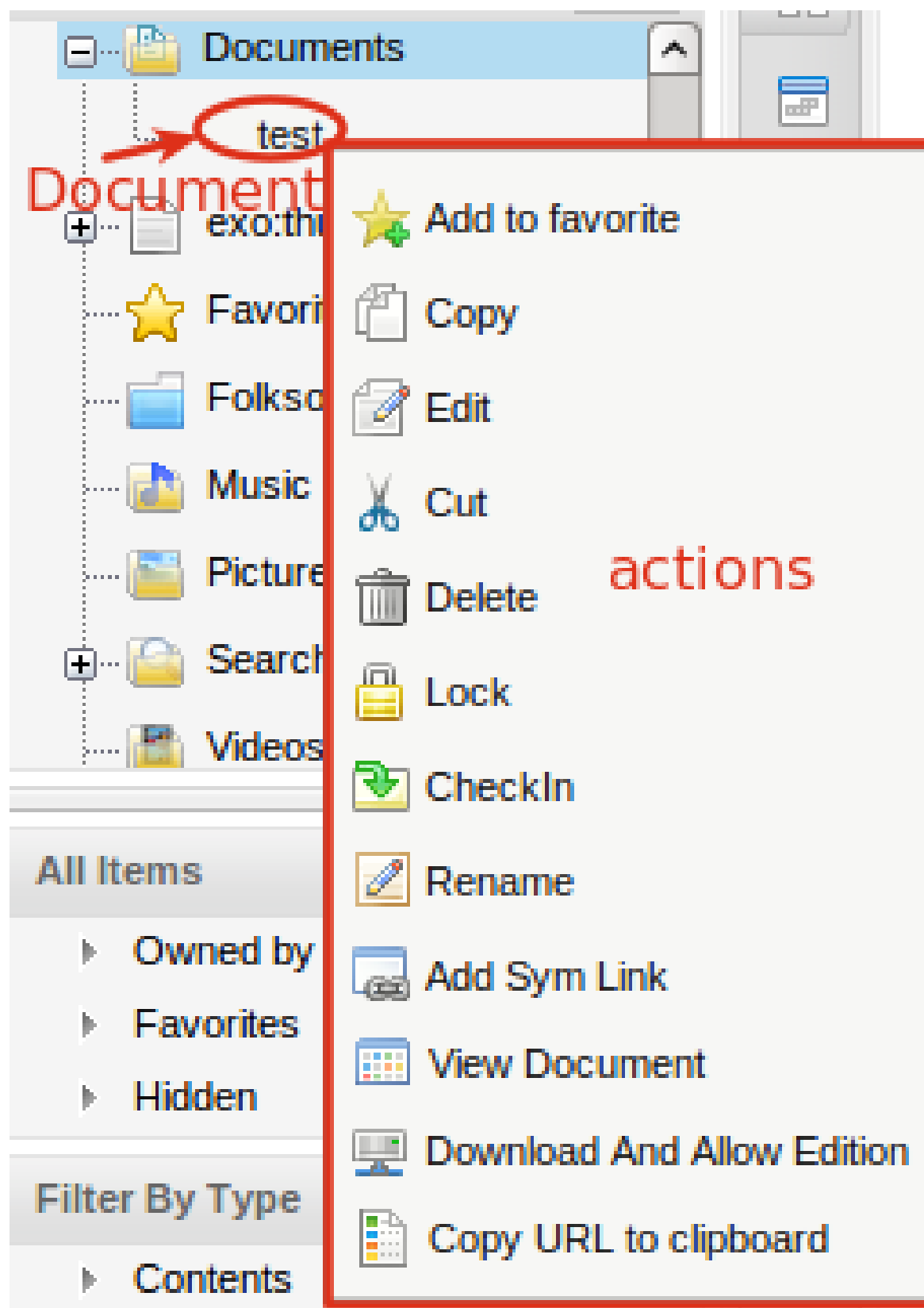
After the content is published, all users who have the right to access that position can view the published web content as a page on the Navigation bar.

### 4.6.6. Actions on Folders and Documents

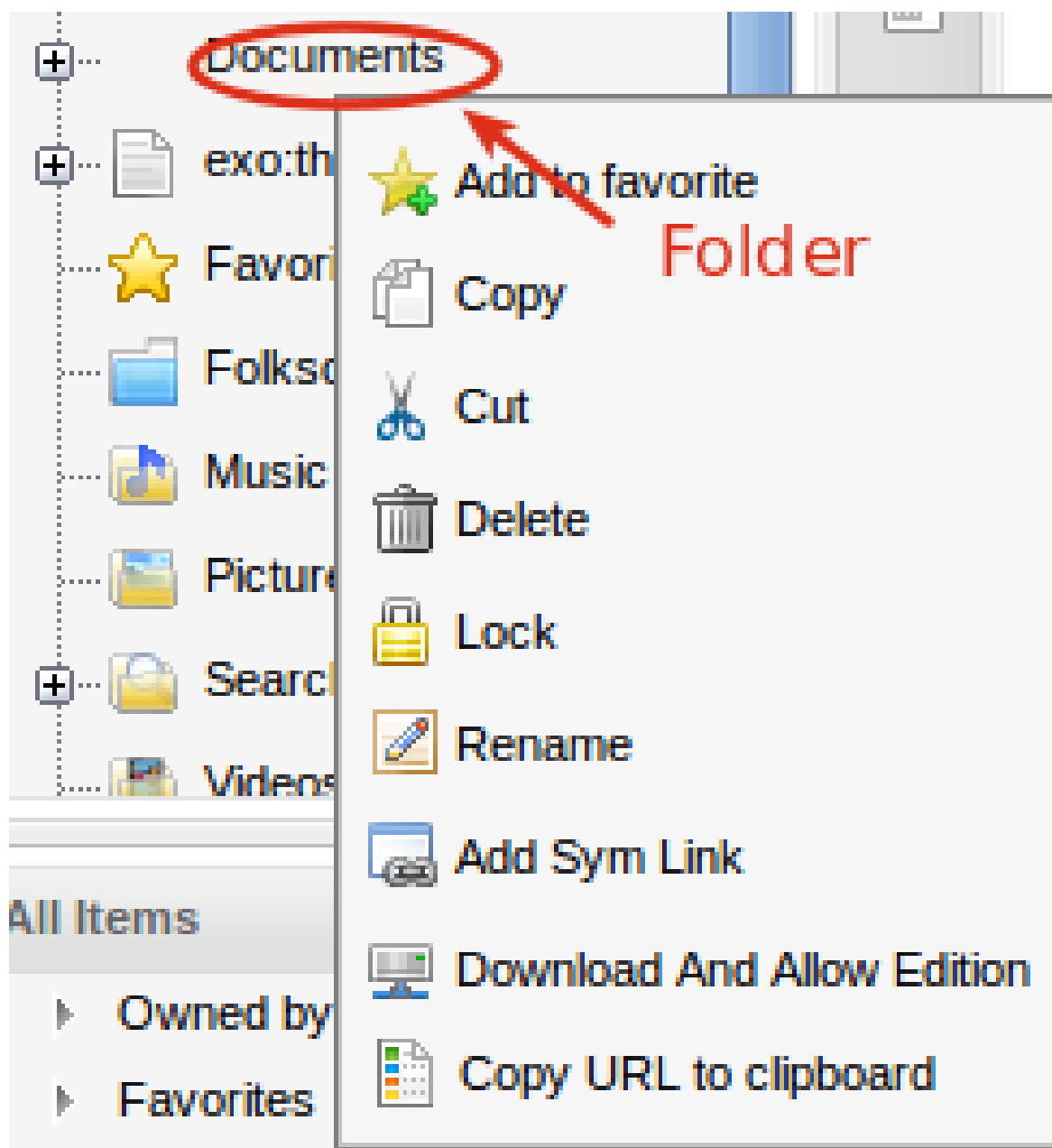
In this section, we will present the actions on folders and document in the right-click menu (Add to favorites, copy, cut, paste, add Symlink, lock/unlock, view document, rename, download and allow edition and copy URL to clipboard) and other actions (drag and drop folders or documents).

Depend on the actions on folders or documents, the right-click menu (drop-down menu) is different.

The actions in the right-click menu for documents:



The actions in the right-click menu for folders:

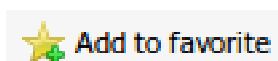


#### 4.6.6.1. Add to favorites

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

#### Procedure 4.72.

1. Right-click a node 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

This function is used to make a copy of a node (including sub-nodes) to other places.

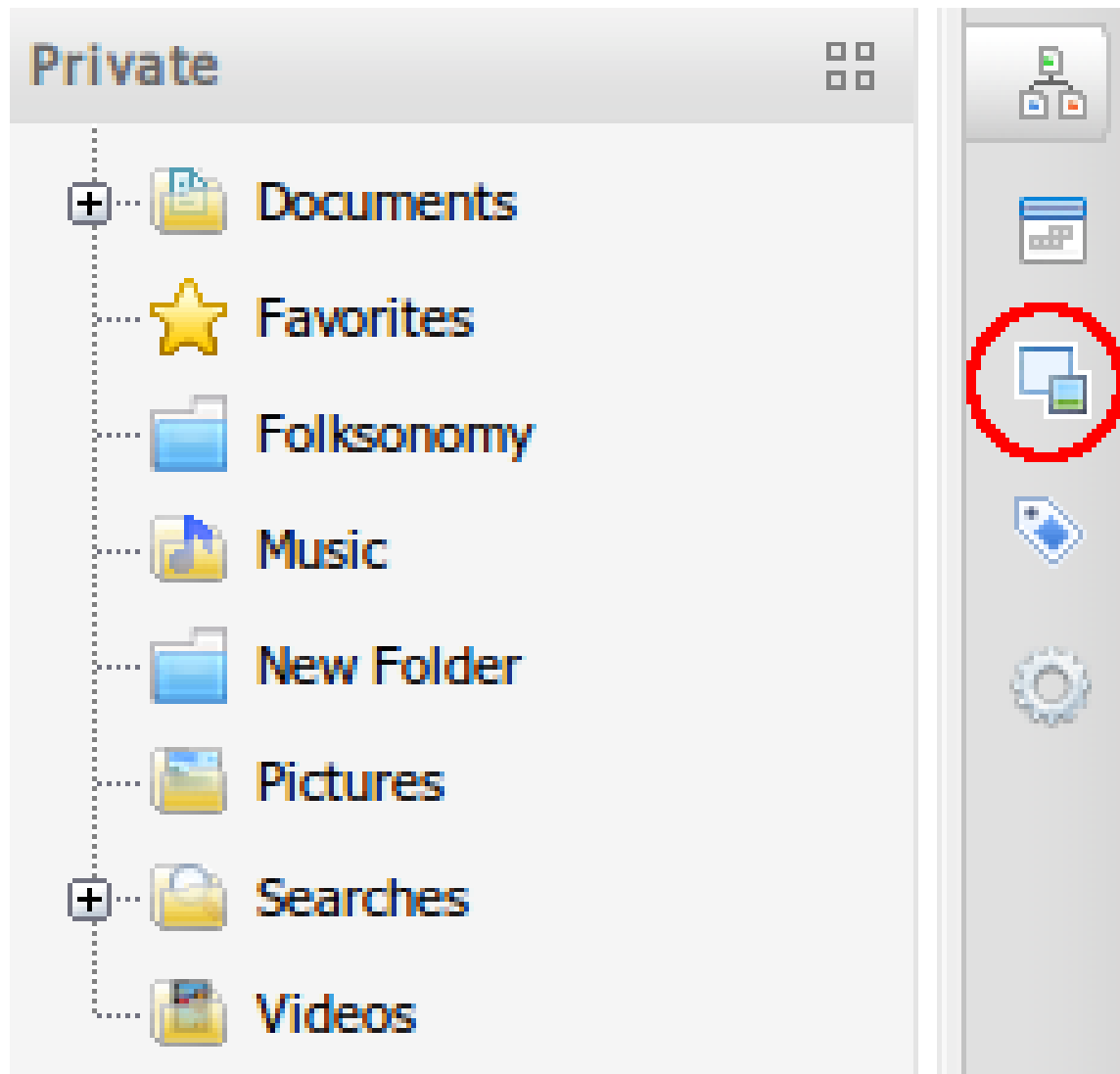
There are two ways to cut/copy/paste the node:

#### Procedure 4.73. Method One

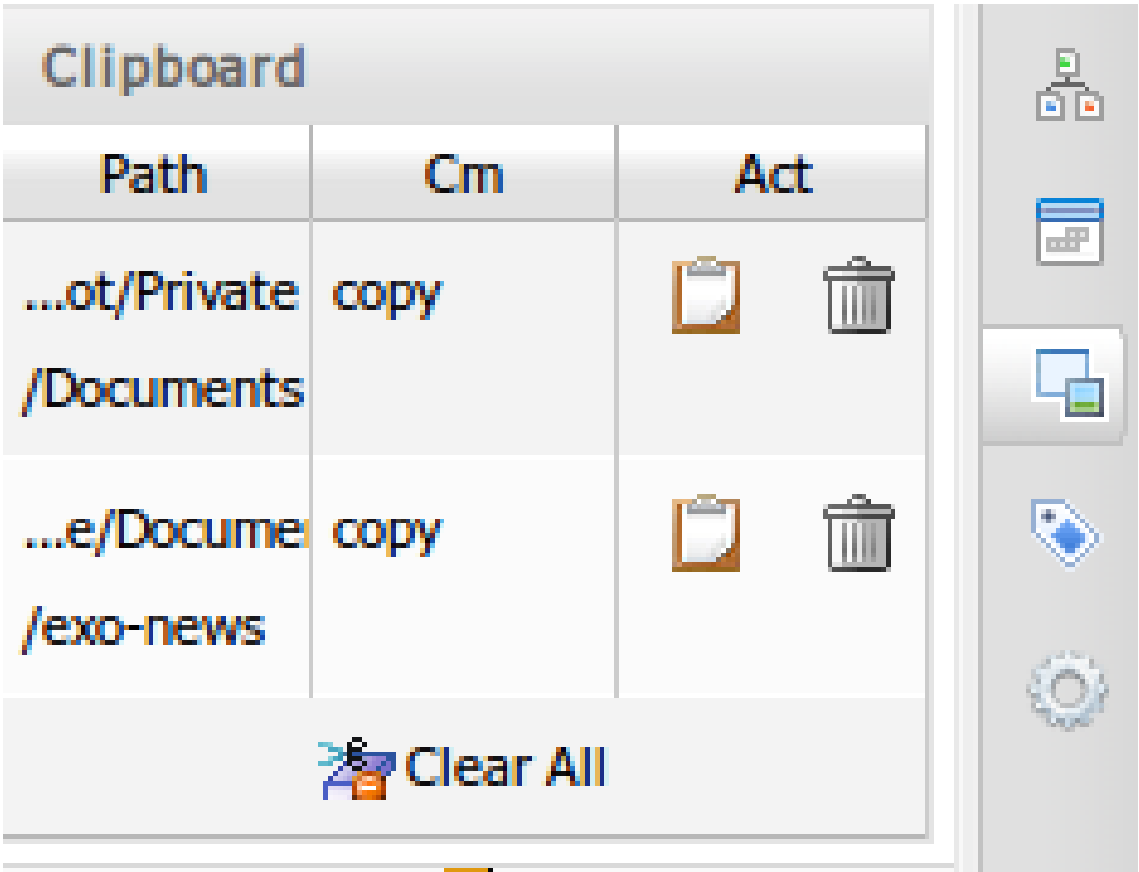
1. Right-click the node > select **Copy** from the drop-down menu (or called "the right-click menu").
2. Select a destination node that you want to be the parent node of the cut/copied node.
3. Right-click the destination node > select **Paste** in the drop-down menu. Note that the **Paste** function is enabled in the menu only after selecting the **Copy** action.
4. The copied folder (and its sub-folders) will be pasted to the new selected path.





#### Procedure 4.74. Method Two

1. Right-click the node and select the **Copy** from the drop-down menu.
2. Select the destination node that you want to be the parent node of the copied node.
3. Select the Clipboard icon on the sidebar:




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  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.



**Copy/Paste Information**

- You only can take the Copy action if you have a right on the source node.
- You only can take the Paste action if you have a right on the destination node.
- If the destination node has the same name with the copied node, after being pasted, the 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 cannot copy a content folder into a document folder.
- After taking the Copy action, you can take the Paste action on different nodes before taking another Copy action.

#### 4.6.6.3. Edit documents

To edit a document, refer to this part [Section 4.6.5.2, “Edit a web content”](#).

#### 4.6.6.4. Cut/Paste

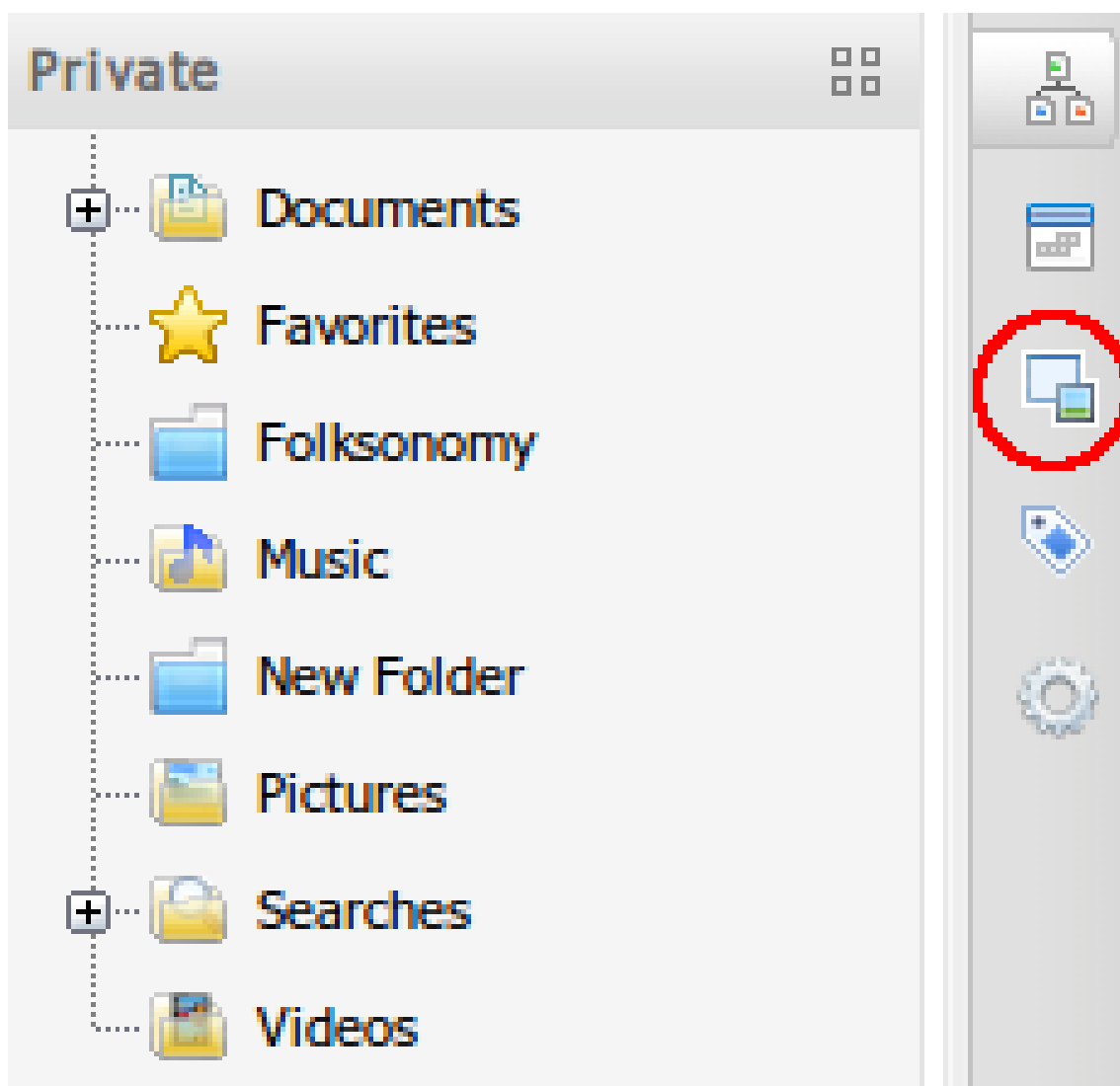
This function is used to move a node (include sub nodes) to other places. There are two ways to cut/paste documents:

##### Procedure 4.75. Method One

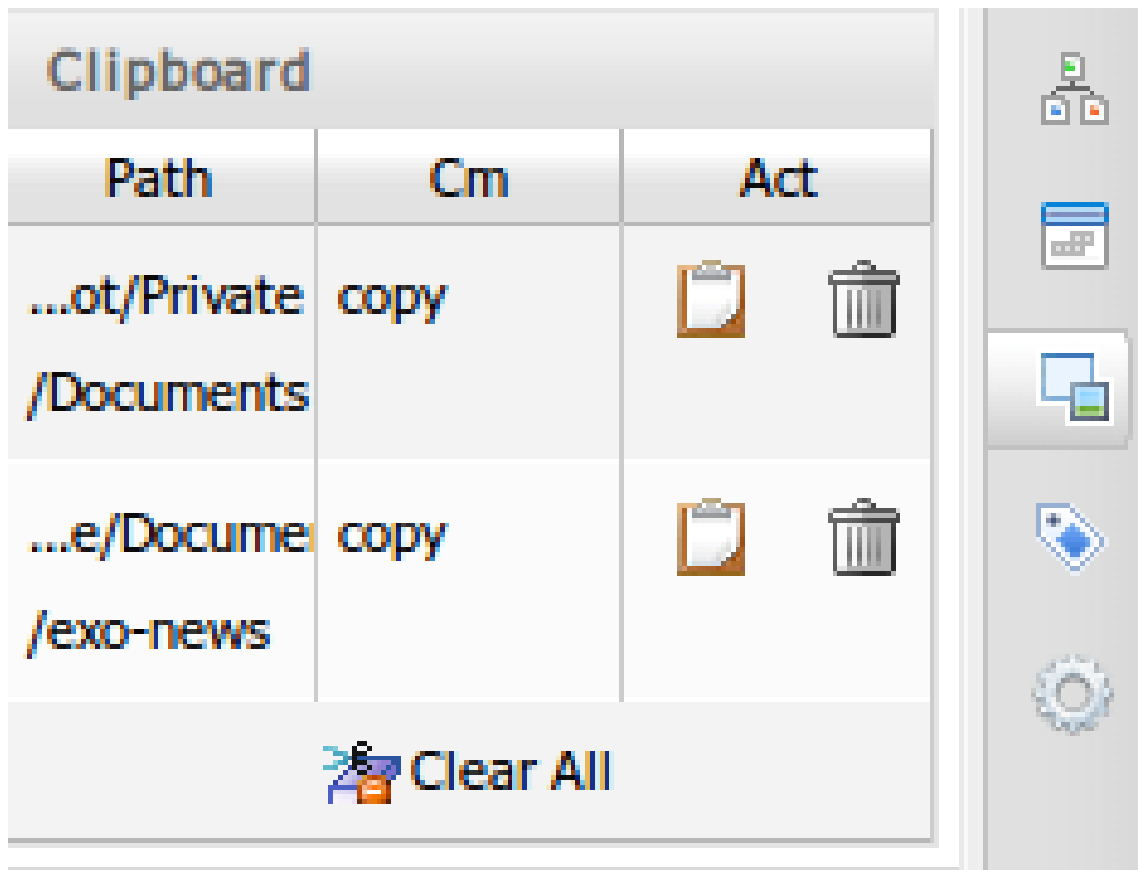
1. Right-click a node > Select **Cut** from the drop-down menu.
2. Select the destination node that you want to be the parent node of the cut node.
3. Right-click the destination node > select **Paste** in the drop-down menu. Note that the **Paste** function is enabled in the menu only after selecting the **Cut** action.
4. The cut node (and its sub-nodes) will be pasted to the new selected path.

##### Procedure 4.76. Method Two

1. Right-click a node > Select **Cut** from the drop-down menu.
2. Select the destination node that you want to be the parent node of the cut 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 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 cannot Cut a content folder into a document folder.
- After taking the Cut action, you can take the Paste action on different nodes before taking another Cut action.

### 4.6.6.5. Delete folders and documents

This function helps you remove folders/documents from their location easily. Do the same steps as [Section 4.6.5.3, “Delete a web content”](#)



#### 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.

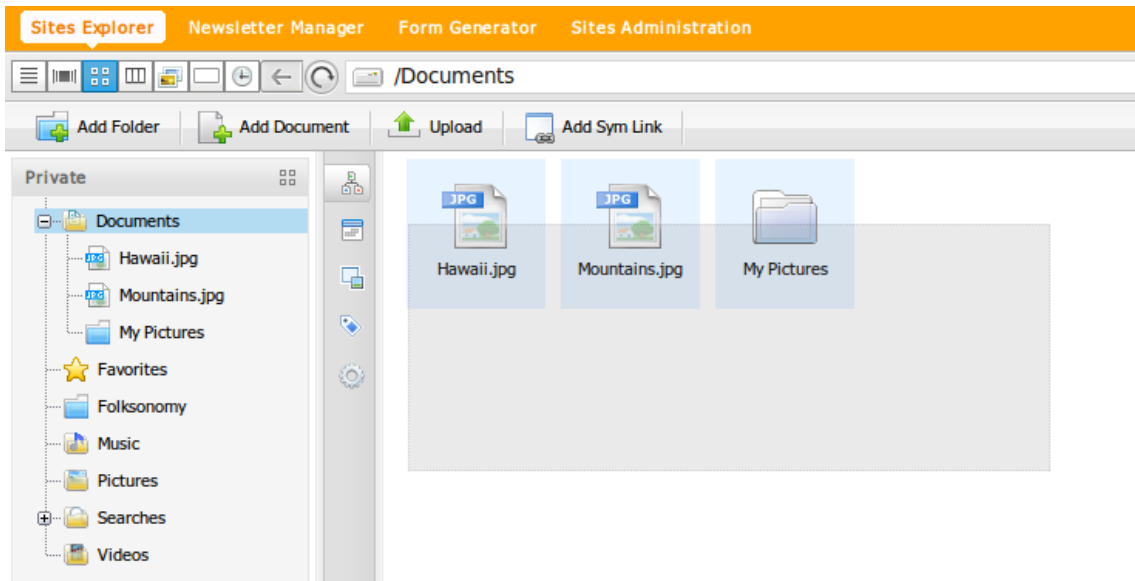
### 4.6.6.6. Drag and drop folders and documents

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

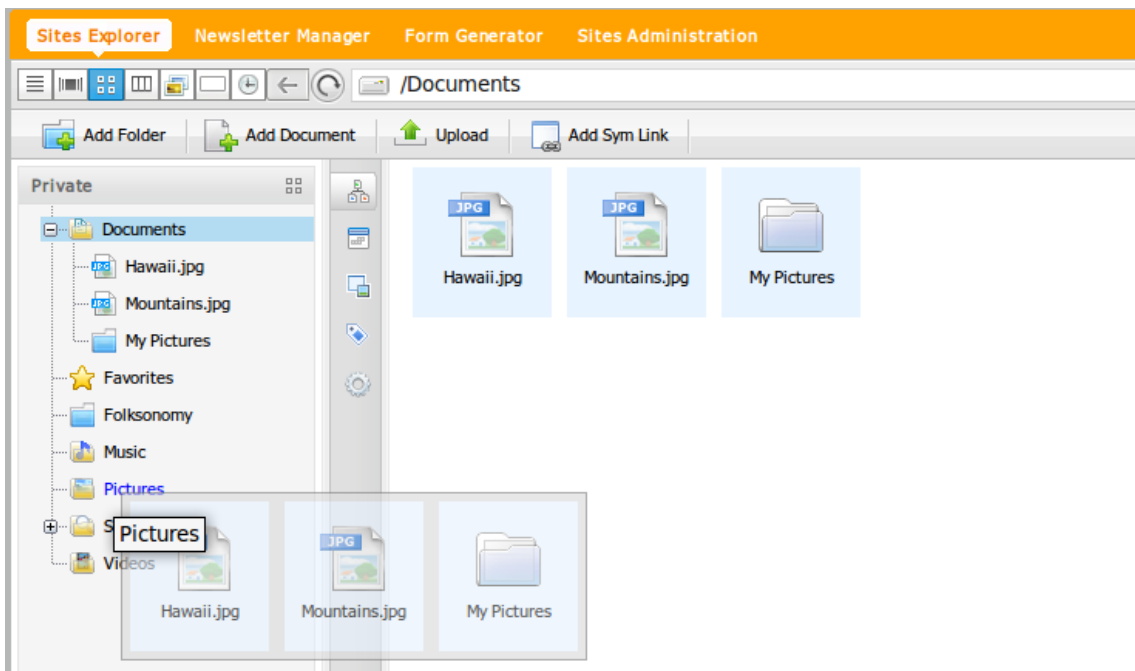
#### Procedure 4.77.

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





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



3. Drop them into the selected folder (by releasing the left mouse button). All 'dragged' folders/documents will be relocated to the destination folder.

#### 4.6.6.7. Lock/Unlock folders and Documents

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

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



### Locking Rights

- Only users with appropriate rights can lock folders/documents.
- After locking, other users can only view the folders/documents.
- 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.

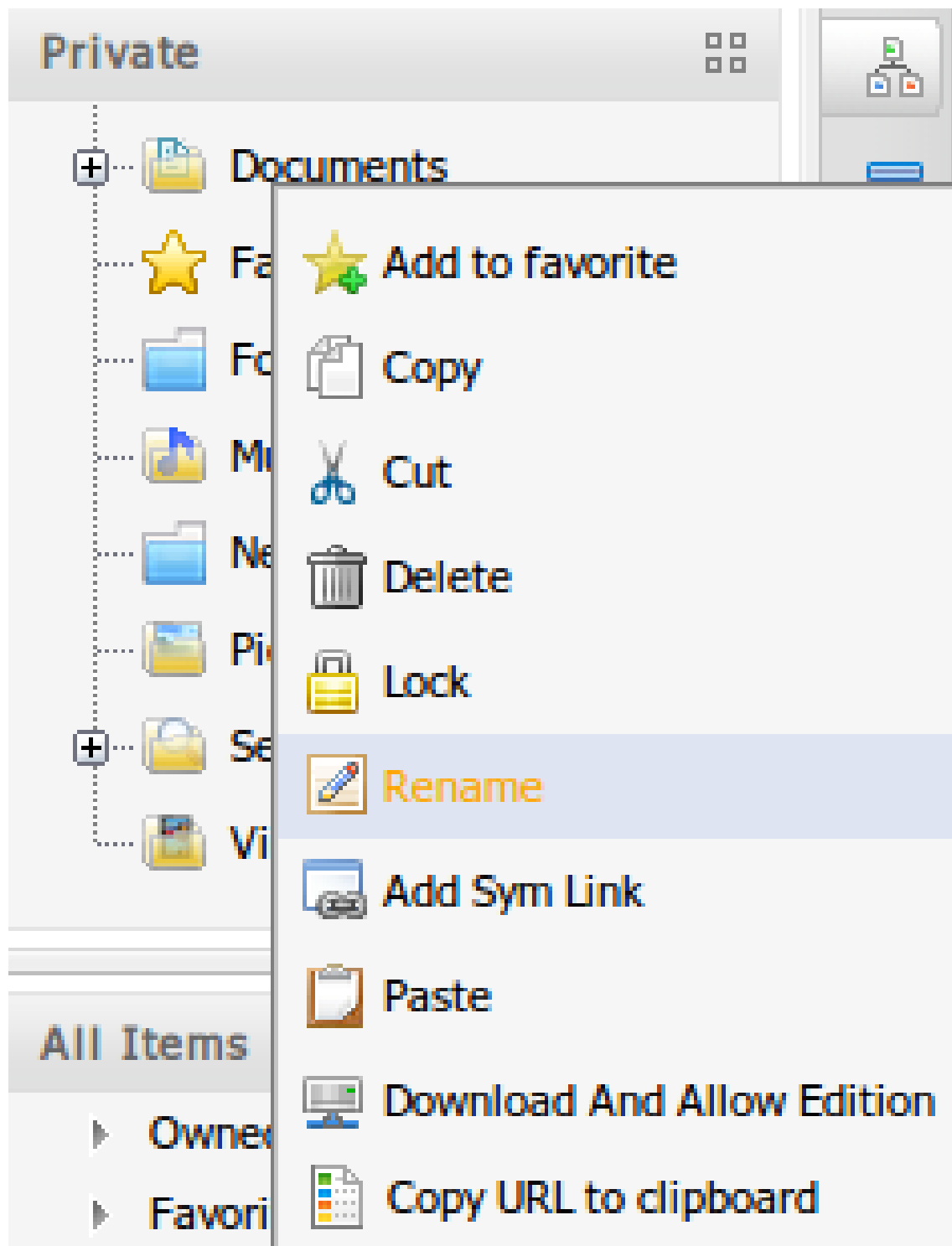
**Unlock folders/documents.** To unlock a folder/document, right-click a locked folder/document and select the **Unlock** item on the menu. The folder/document will then be unlocked and other users can take actions on it.

#### 4.6.6.8. Rename folders and Documents

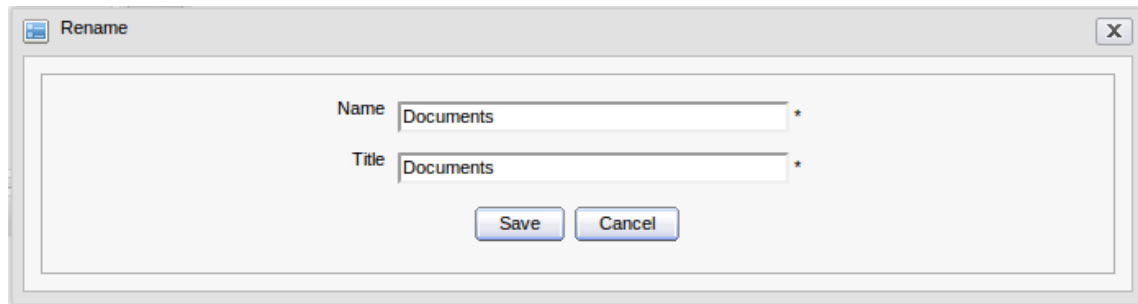
This function is used to change the name of a folder/documents.

#### Procedure 4.78.

1. Right-click a folder/document 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.

#### Procedure 4.79.

1. Select a document that you want to add a symlink.
2. Right-click that document and select **Add SymLink** from the menu.
3. The selected document will be added a symlink immediately. You now can click the sym link to view its content.

### 4.6.6.10. View WebDAV

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

#### Procedure 4.80.

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:** Viewed 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

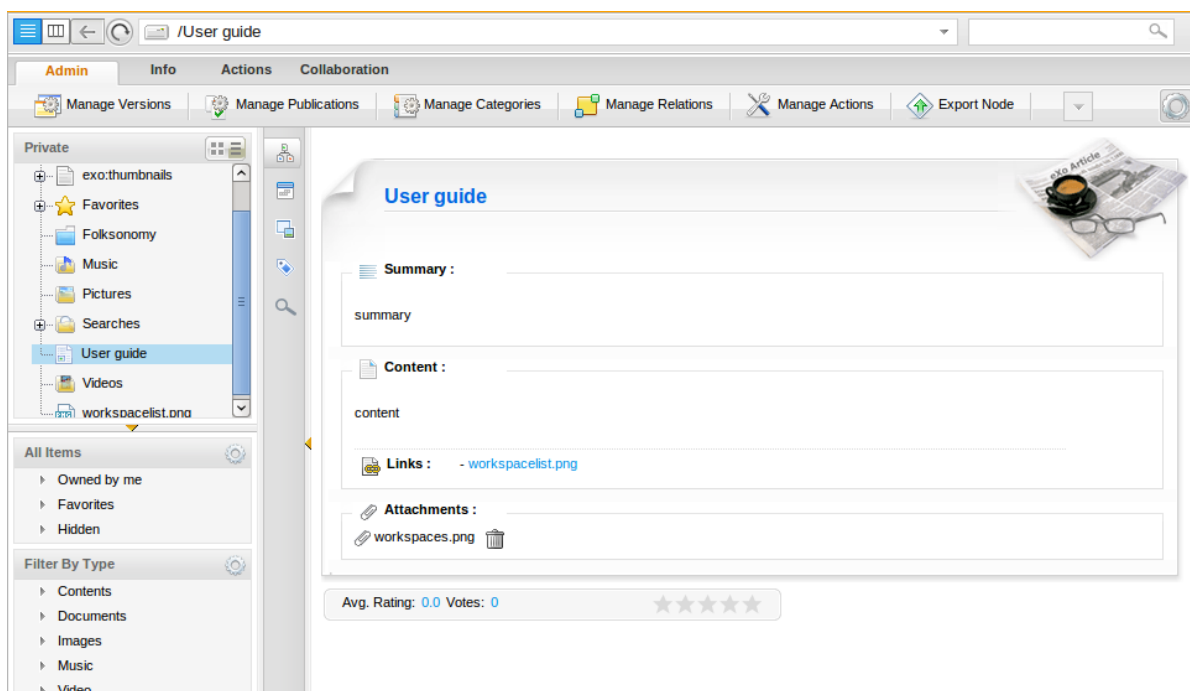
The **View Document** item is visible in the drop-menu when you right-click on a document. This function enables you to view the document on another browser with the link containing the document path.

Do the following to view a document.

#### Procedure 4.81. View a document

- Right-click a document that you want to view > Select **View Document** in the drop menu.

The document is opened in another browser:



The URL of the document is like the following:

URL: ...ecmdemo/private/acme/siteExplorer/repository/Private/User guide

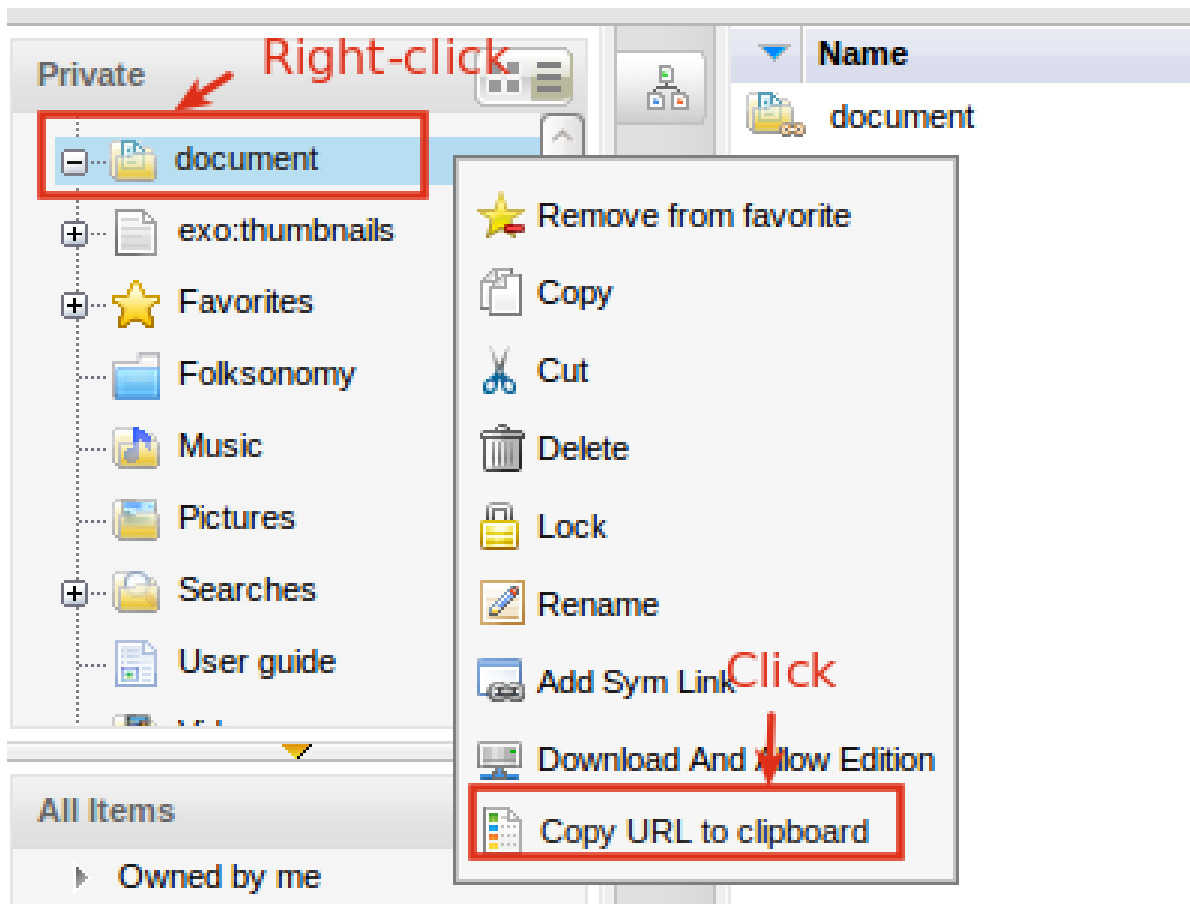
### 4.6.6.12. Copy URL to Clipboard

The Copy URL to Clipboard enables you to copy the Webdav URL of a selected folder or a document and then you can view it by WebDAV view on a browser.

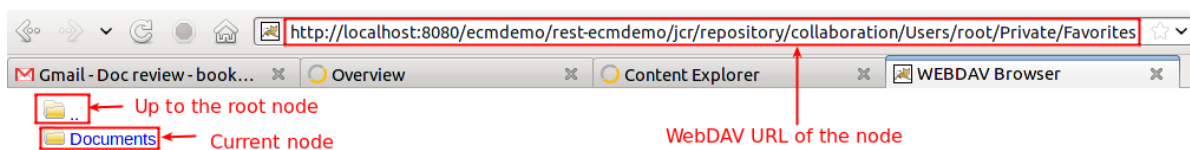
Do the following:

#### Procedure 4.82. Copy URL to Clipboard

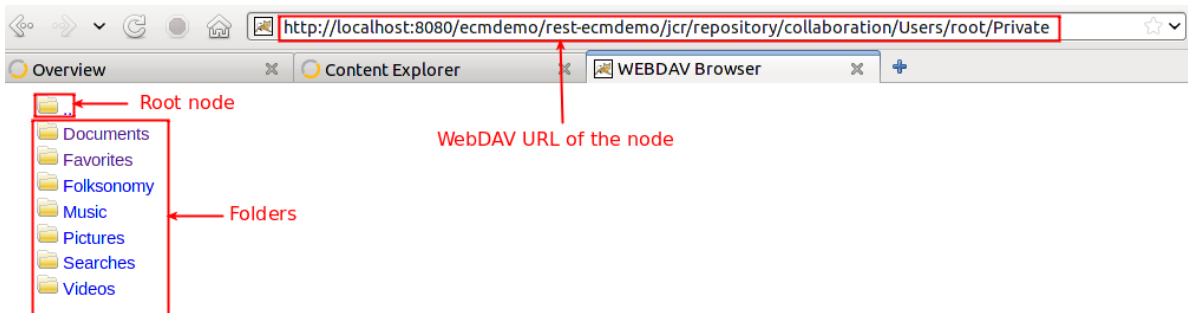
1. Right-click a folder/document > Select **Copy URL to Clipboard**.



2. Paste the URL on another browser.



You can view the folders of the node you copied its URL or download documents to your computer. You also view other nodes by clicking ... above the current folder to go up the root node . See the below illustration:



#### 4.6.6.13. Manage Tags

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

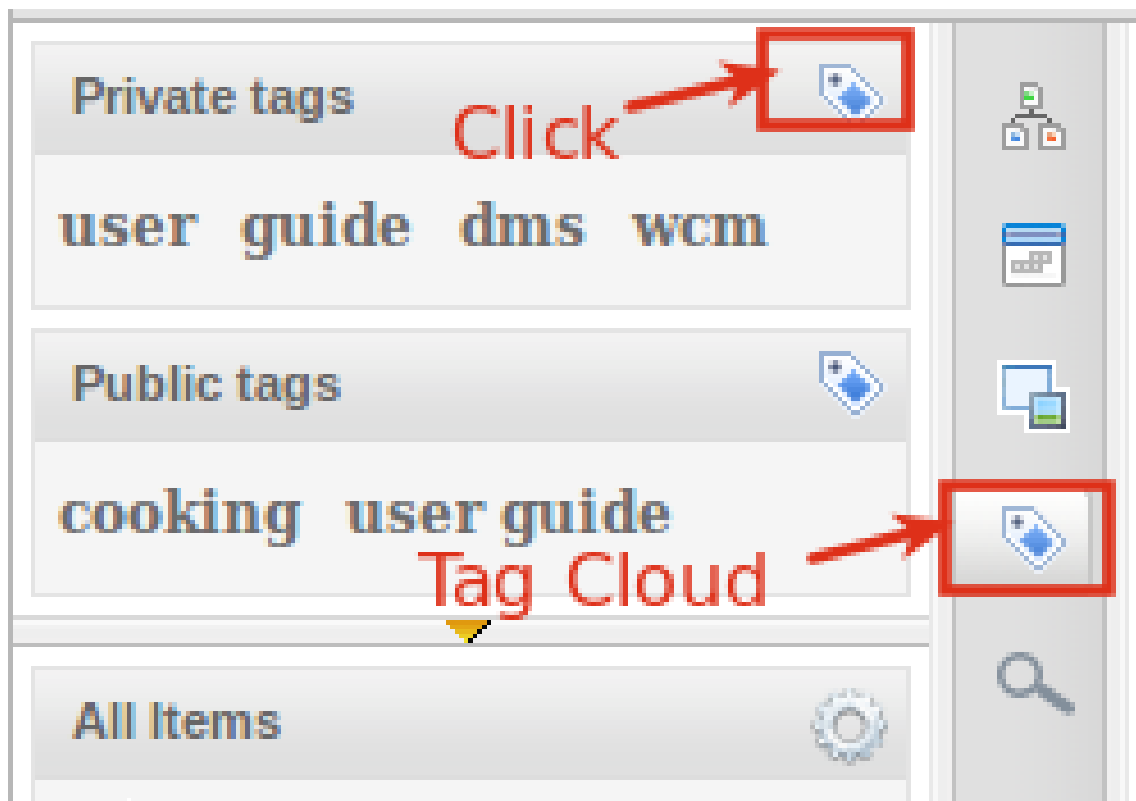
##### Procedure 4.83. Edit a tag

1. Click

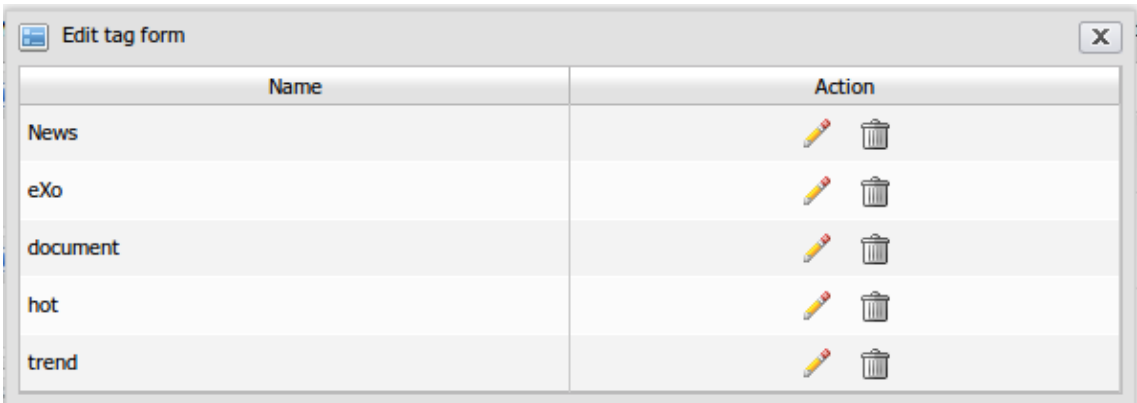
the



icon at the upper-right corner of the tags panel.



The **Edit tag form** will appear:

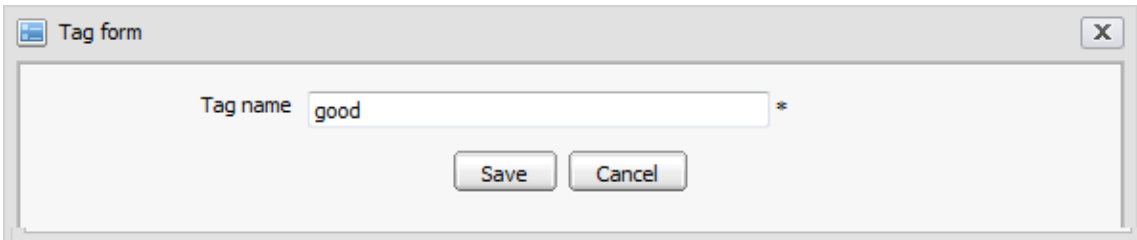


2. Click the



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.

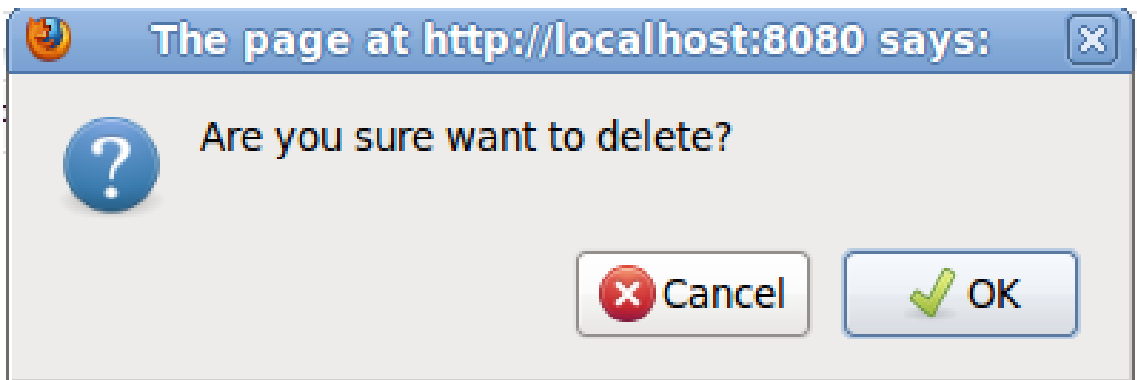
**Procedure 4.84. Delete a tag**

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

2. Click the



A confirmation box will appear:



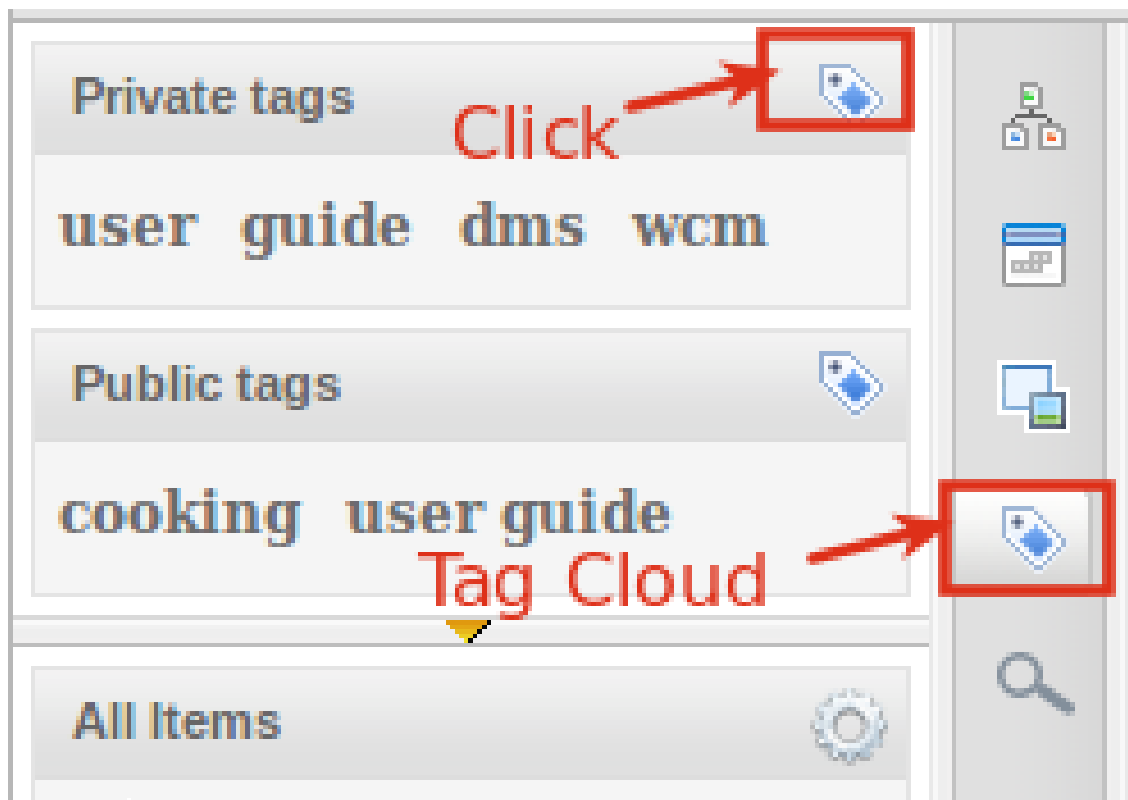
Click **OK** button to delete the tag or **Cancel** to quit.

### Procedure 4.85. Use Created tags

1. Select the Tag cloud



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



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

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

## 4.7. 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 creation 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.

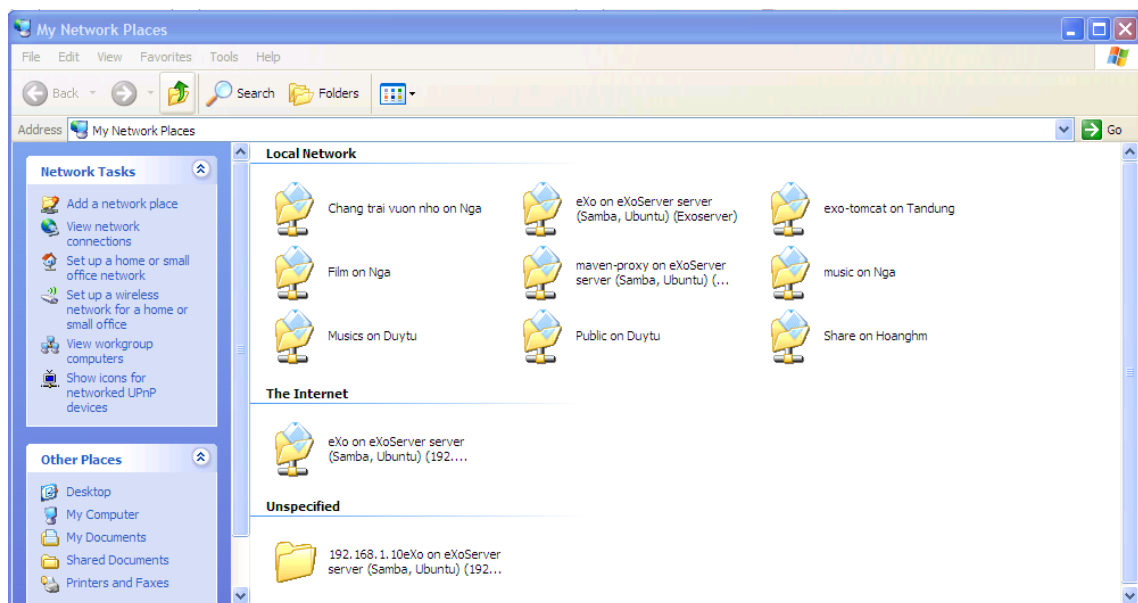
## 4.7.3. How to Use WebDAV With eXo Content

eXo Content supports WebDAV in two ways:

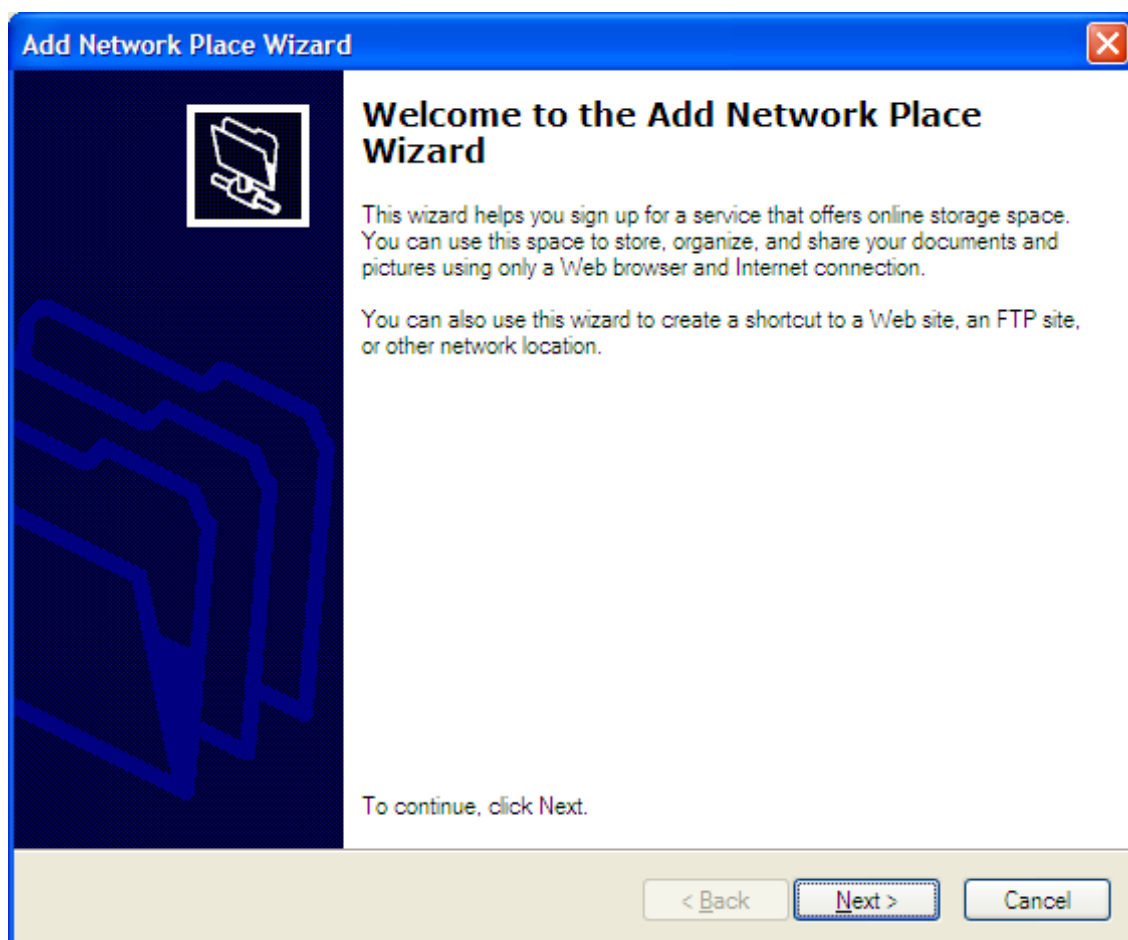
This way is used when you are on a Window System and your computer has to be connected to the Internet or Intranet.

### Procedure 4.86. Method One:

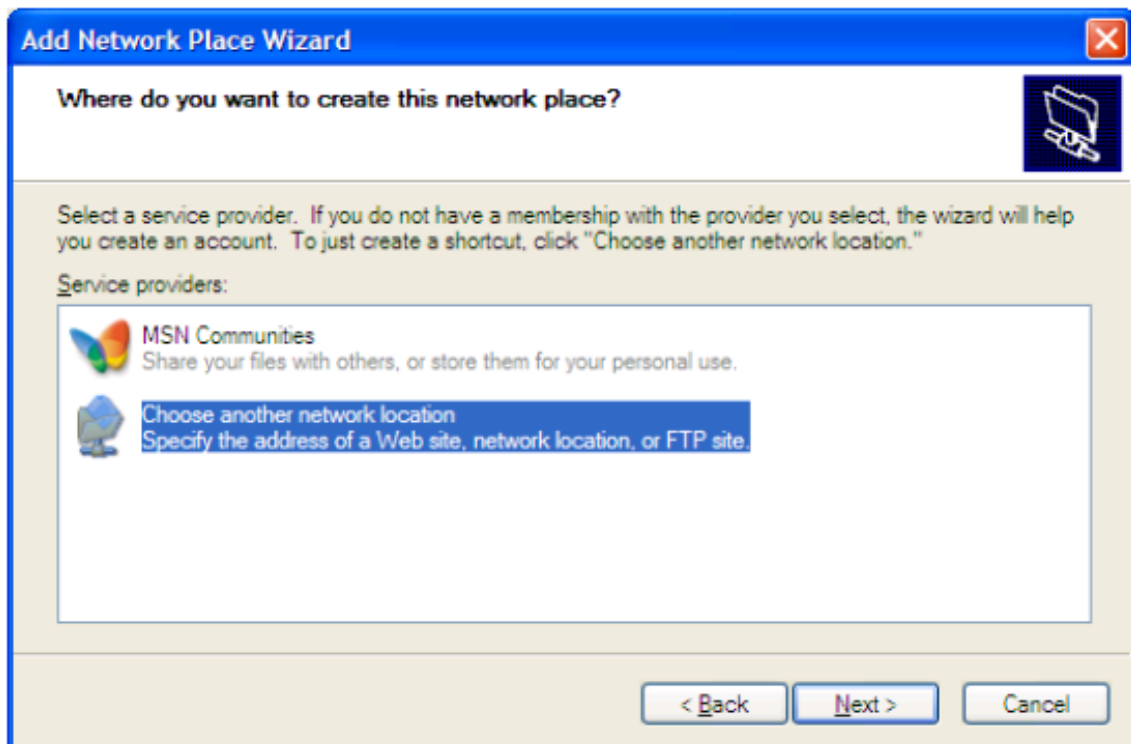
1. Navigate to the **My Network Places** on your local computer. You will see all shared files and folders:



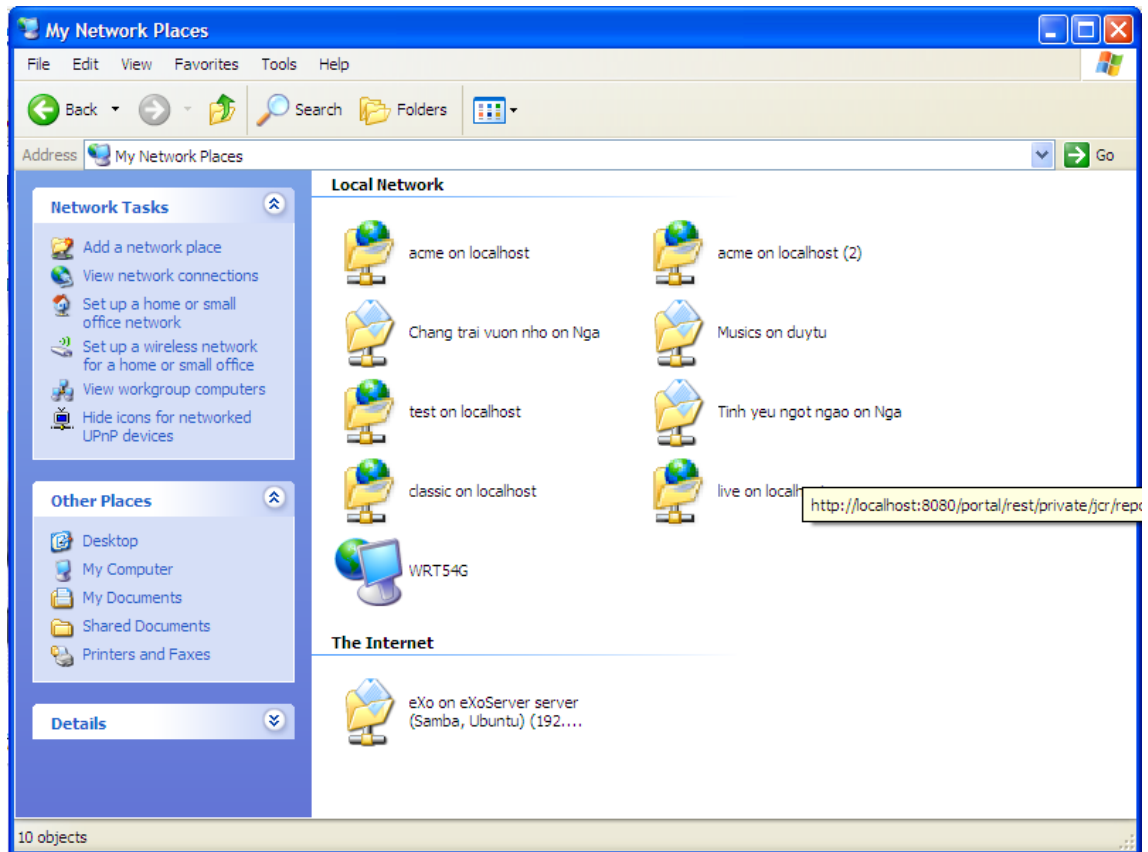
2. Click the **Add a network place** link on the left to open the **Add Network Place Wizard**:



3. Click **Next** to choose a network location:



4. Select **Choose another 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.

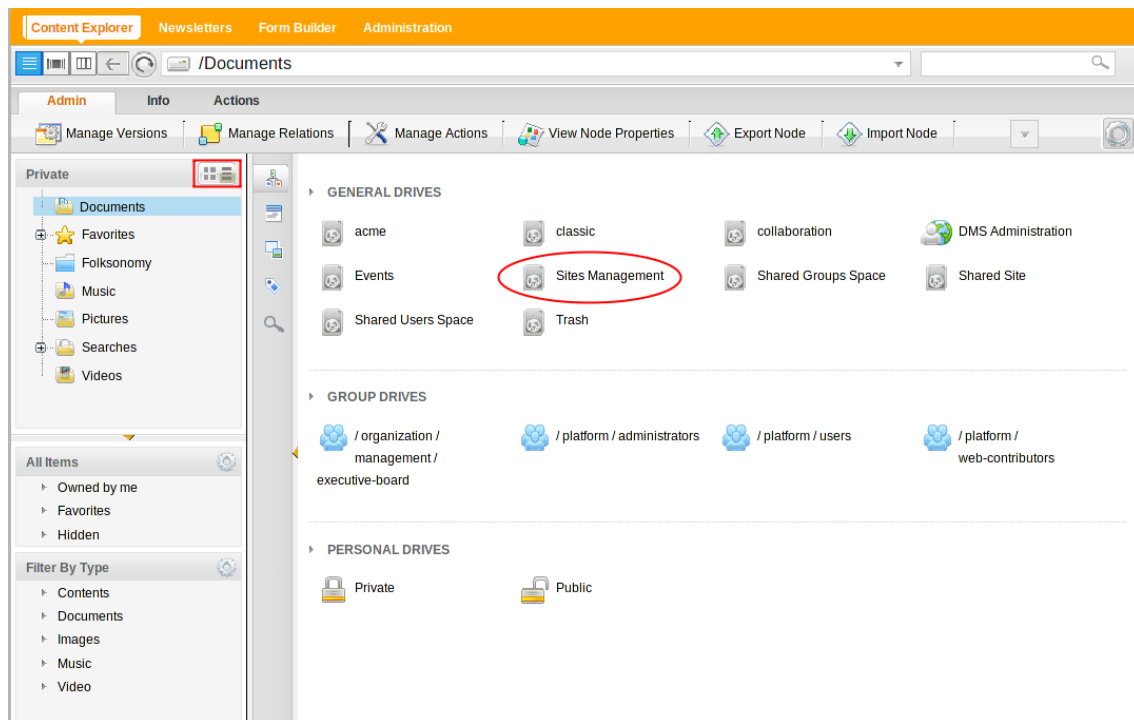


Each site being managed by WebDAV will appear as a folder in this location.

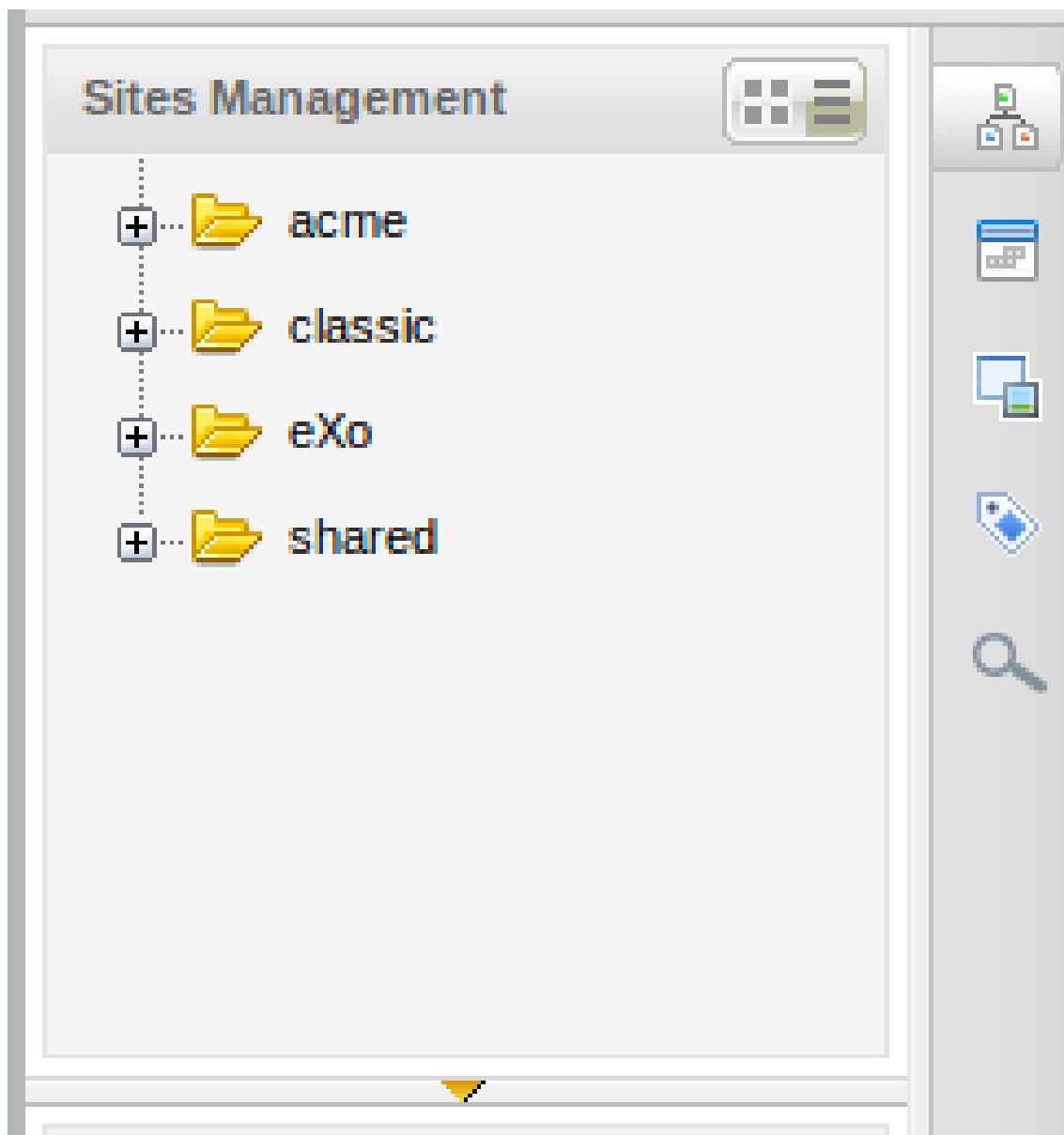
7. Take action on the content in this folder to administer the site content remotely.

#### Procedure 4.87. Method Two:

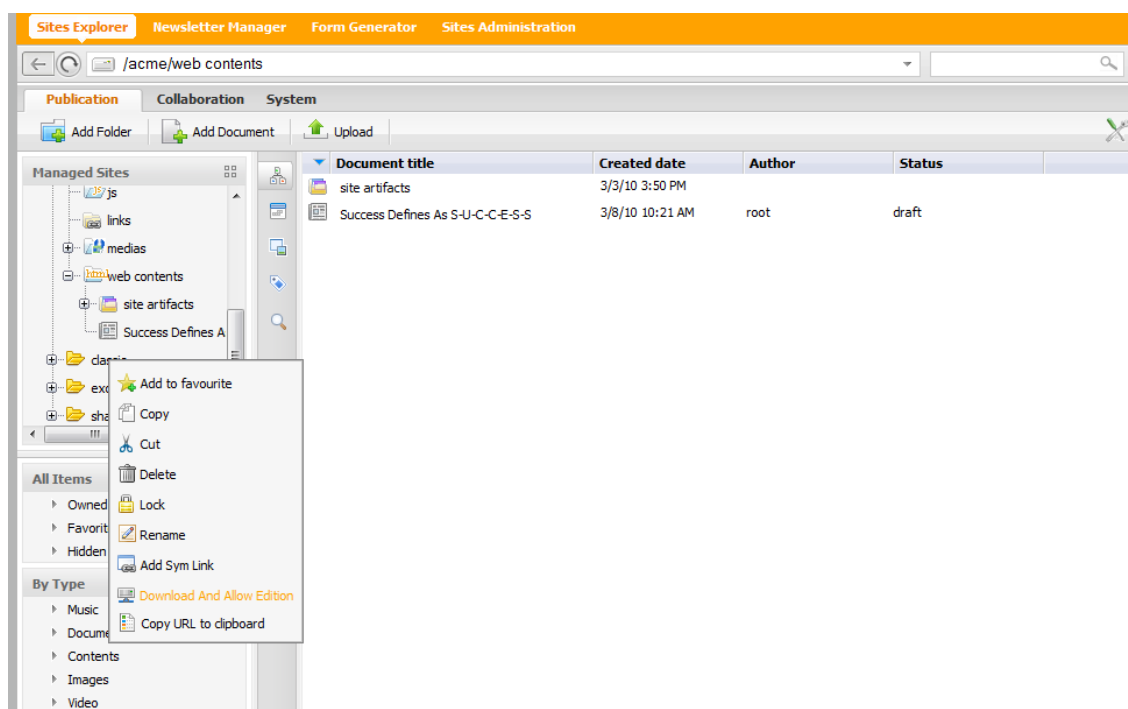
1. Navigate to <http://localhost:8080/portal> in your web browser.
2. Click **Group > Content Explorer** in the administration bar.
3. Click the **Drives** button > select **Sites Management**.



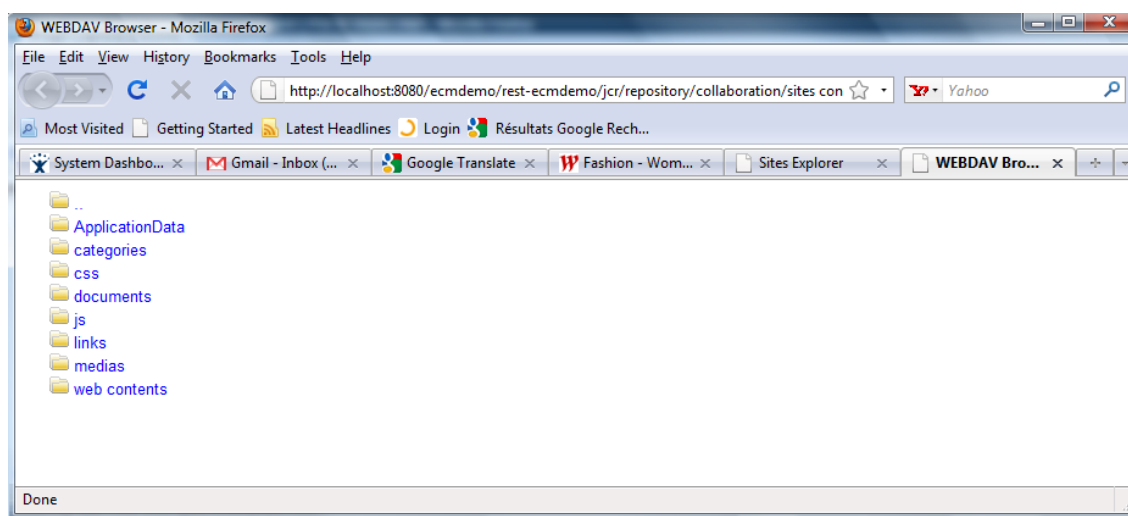
You will see all sites listed in the left sidebar:



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 4.88.

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*.

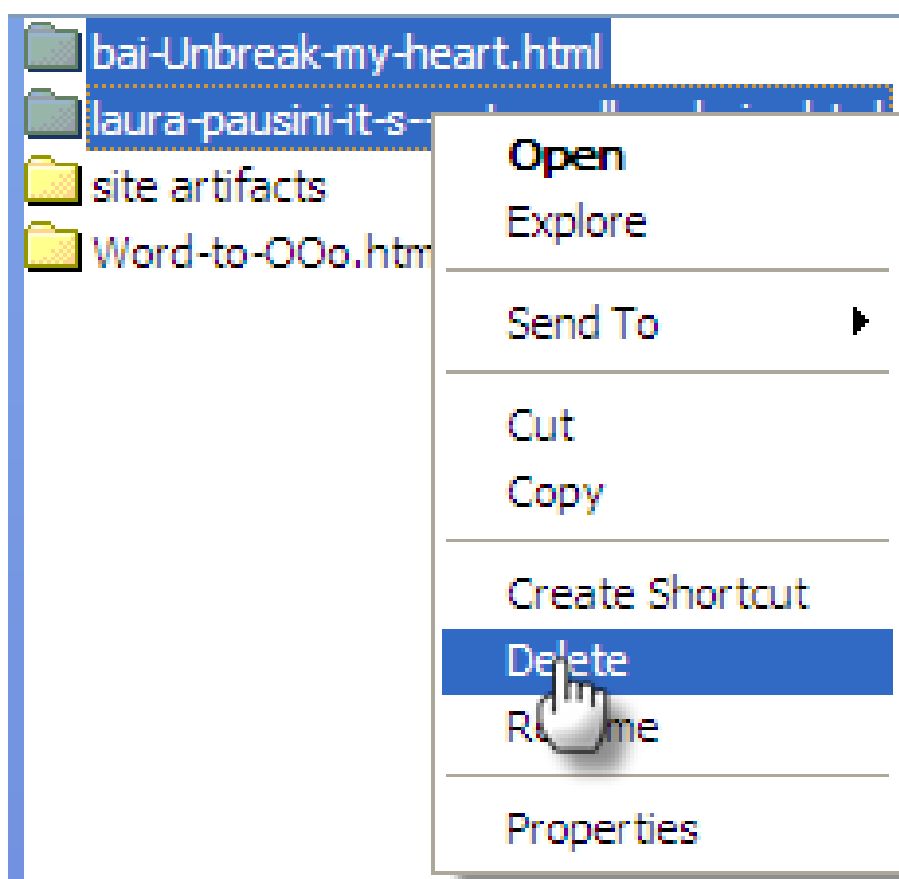
After new content is added it can be viewed as a folder in WebDAV or as page content using a web browser.

#### 4.7.4.2. Delete a web content

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

##### Procedure 4.89.

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** from the context menu.



The selected file(s) will be removed from the site.

## 4.8. Search in Content 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 4.90.

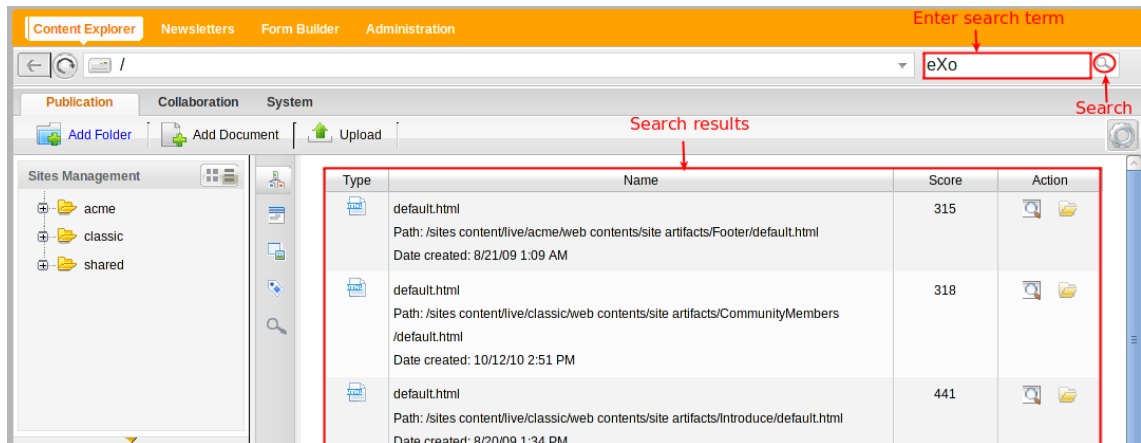
1. Enter a string that is found in the document you are searching for (Note: Do not use the document's name).

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 contains the search string.

Type	Name	Score	Action
No result found!			

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

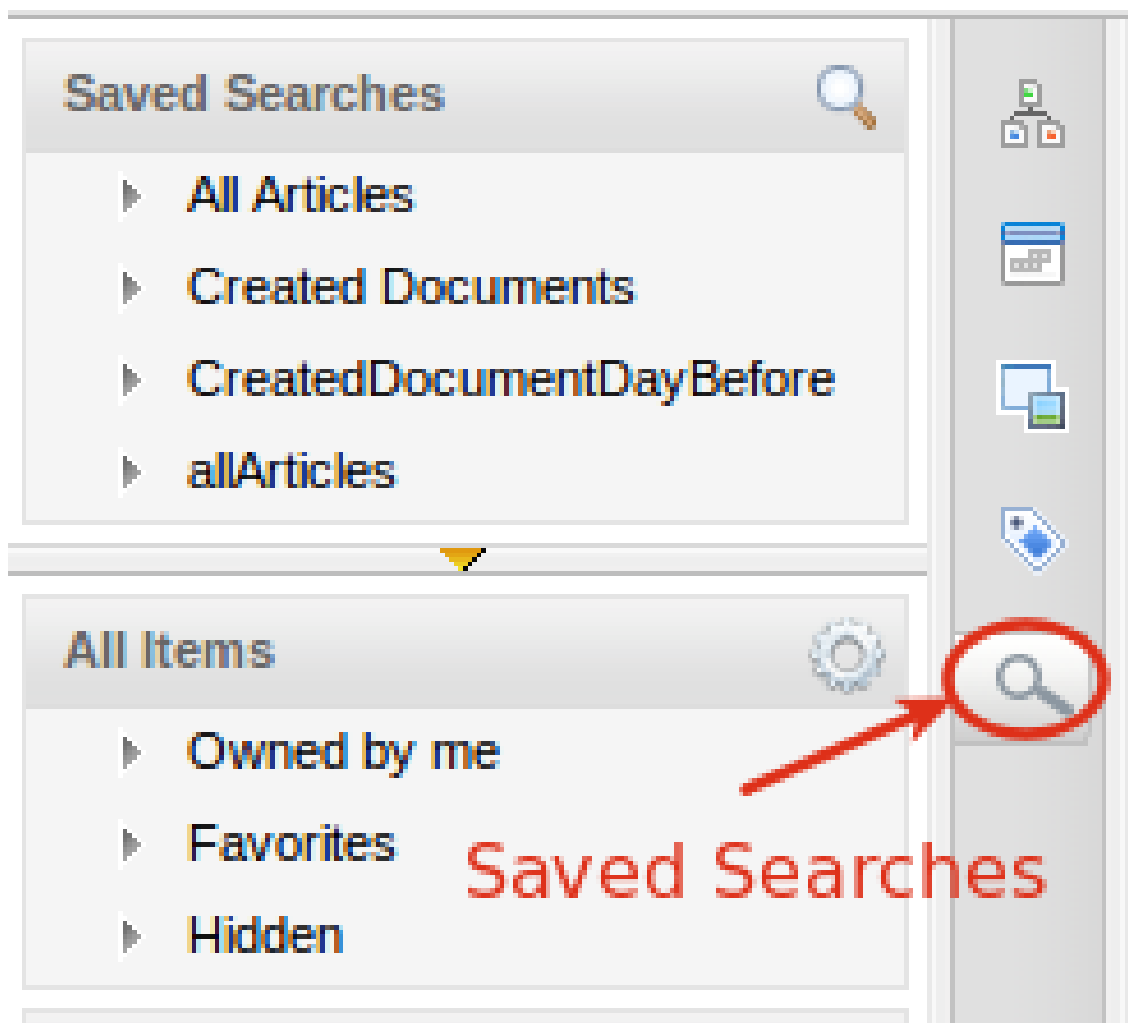
To perform an advanced search:

### Procedure 4.91.

1. Click the



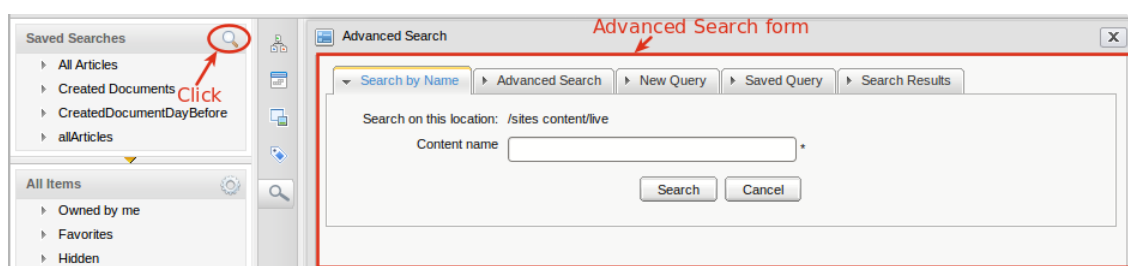
**Saved Search** icon.



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 4.92.

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 4.93.**

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:

Operator : and 1

☐ Property: [text field] Contain Exactly: [text field] 2

☐ Property : [text field] Contain : [text field] 3

☐ Property : [text field] Not Contain: [text field] 4

☐ CREATED [dropdown] From [text field] To [text field] 5



☐ Document Type : [text field] 6

☐ Category : [text field] 7

Add Cancel

**Table 4.18.**

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.

Item	Details
4	These fields allow you to add a constraint to search by a property that contains one of the word in the specific string.
5	These fields allow you to add a constraint to search by a property that does not contain the specific string.
6	These fields allow you to add a constraint to search by a duration of date (created, modified).
7	This field allow you to add a constraint to search by the document type (File, Article, Podcast, Sample node, File Plan, Kofax).
8	This field allow you to add a constraint to search by categories.
	Add a 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 4.94. 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




Operator : and ▼


☐ Property :   Contain Exactly :  

☐ Property :   Contain :

☐ Property :   Not Contain :


☐ CREATED ▼ From  To

☐ Document Type :  

☐ Category :  

Add Cancel

A list of possible properties appears:

 Select property X

Metadata Type dc:elementSet ▼

☒ dc:date

☐ dc:creator

☐ dc:coverage

☐ dc:subject

☐ dc:publisher

☐ dc:identifier

☐ dc:rights

☐ dc:source

☐ dc:description

☐ dc:relation

☐ dc:format

☐ dc:title

☐ dc:language

☐ dc:resourceType



☐ dc:contributor


Add Cancel


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:




Operator : and ▼


☒ Property: dc:subject  Contain Exactly :  

☐ Property :   Contain :

☐ Property :   Not Contain:

☐ CREATED ▼ From  To


☐ Document Type :  

☐ Category :  

Add Cancel

The **Filter** form will appear:

**Filter form**

Filter :  

Results :

- system guide document
- uploaded image

\*

Select Cancel

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.

Operator : **and** ▼

☒ Property : **dc:title** Contain Exactly : **uploaded image**

☐ Property :  Contain :

☐ Property :  Not Contain :

☐ **CREATED** ▼ From  To

☐ Document Type :

☐ Category :

**Add** **Cancel**

### Procedure 4.95. 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 4.96. 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;

Operator : **and** ▼

☒ Property: **dc:subject** Contain Exactly :

☐ Property :  Contain :

☐ Property :  Not Contain:

☐ **CREATED** ▼ From  10

☐ Document Type :

☐ Category :

**March - 2010**

S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

Select the date you want to use as a constraint.

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

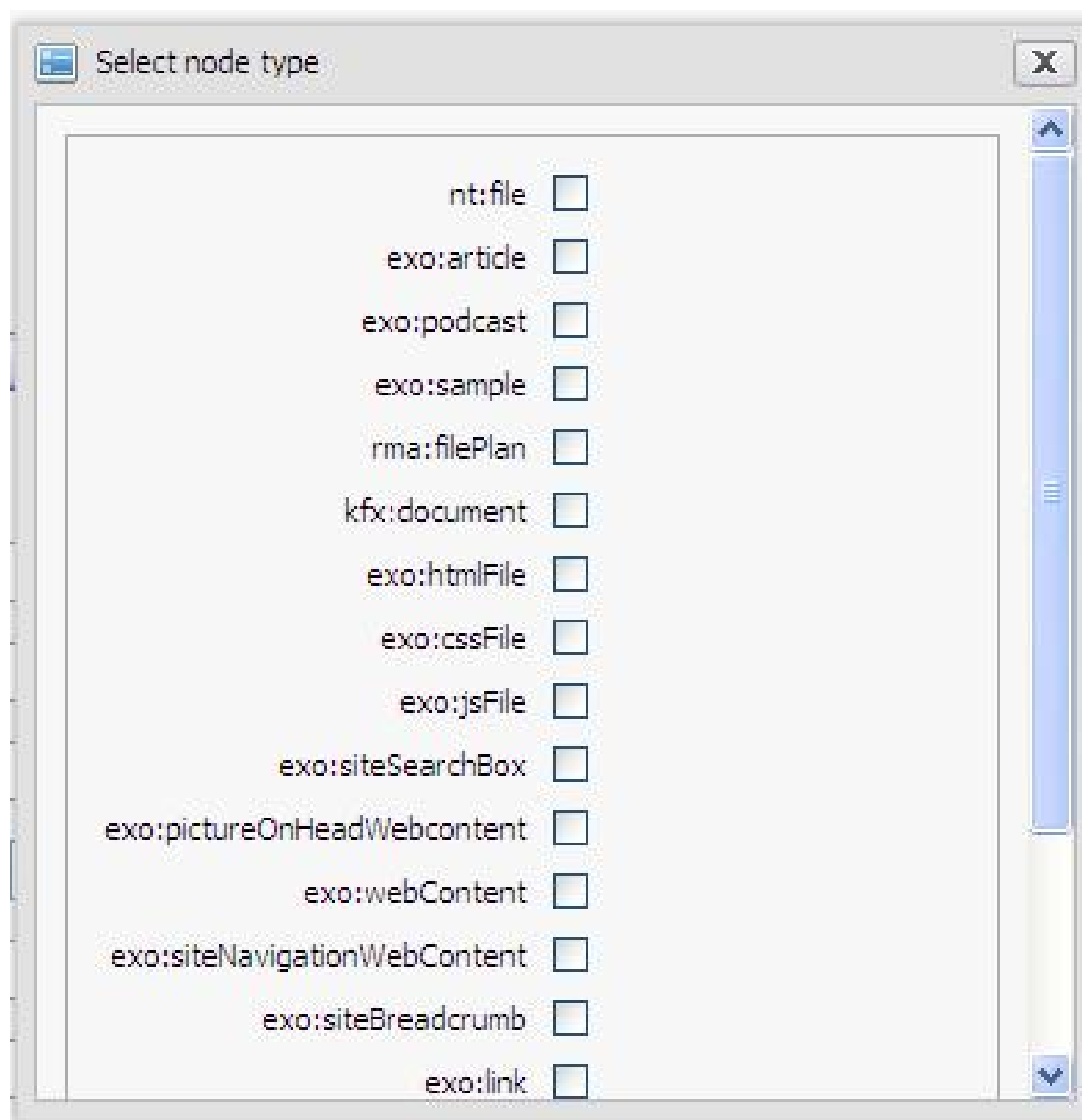
The selected dates will populate the **From** and **To** fields in the **Add constraint** form.

### Procedure 4.97. 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.

Operator : and

☒ Property: dc:title

Contain Exactly : uploaded image

☐ Property :

Contain :

☐ Property :

Not Contain:

☐ CREATED

From 03/01/2010

To 03/15/2010

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

☐ Category :

Add

Cancel

Procedure 4.98. 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:

Add category to search

UIOneTaxonomySelector

Taxonomy Tree System

Cms

Calendar

Name	Action
Cms	<input checked="" type="checkbox"/>
Calendar	<input checked="" type="checkbox"/>

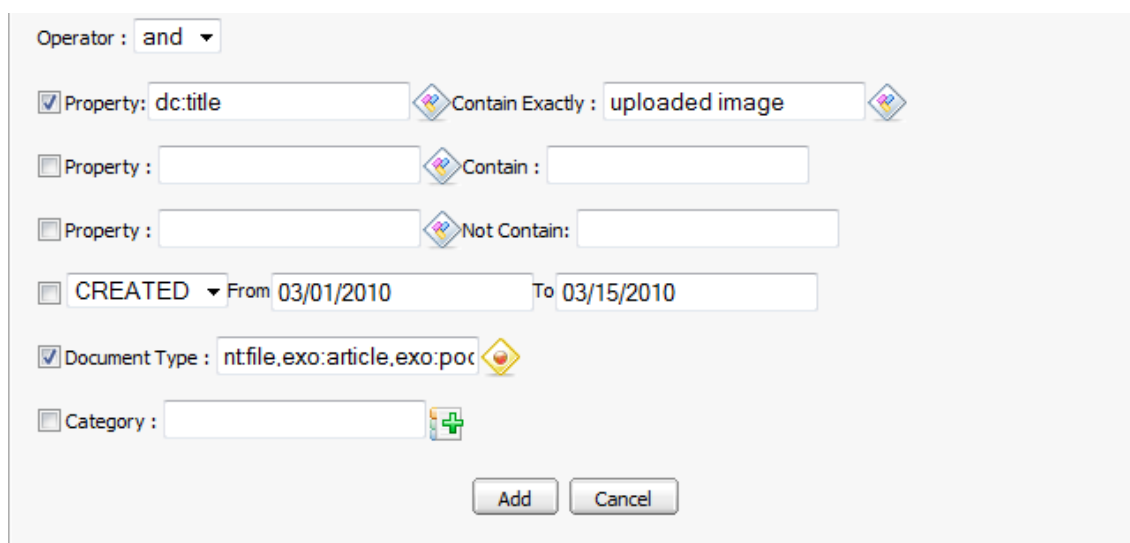
Close

3. Click the



that corresponds to the category you want.


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


181




Operator : and ▼


☒ Property : dc:title  Contain Exactly : uploaded image 

☐ Property :   Contain :

☐ Property :   Not Contain:

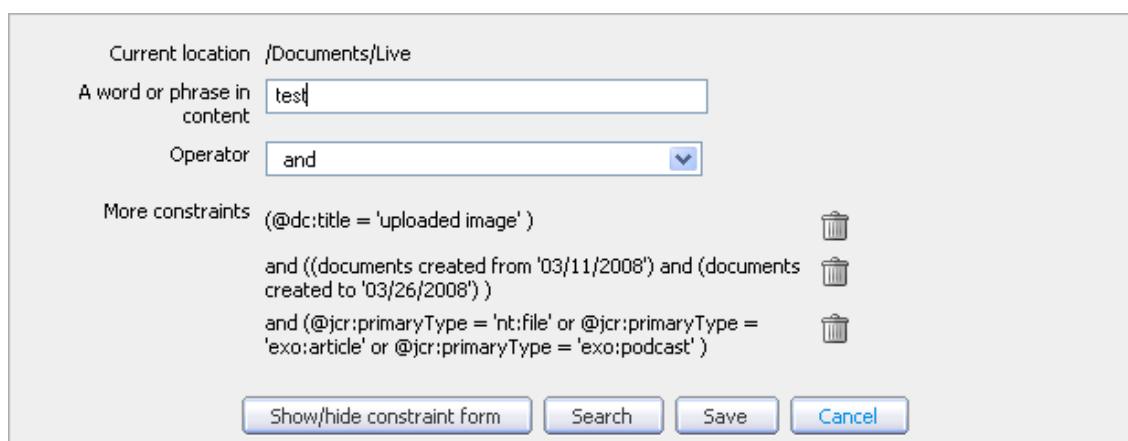
☐ CREATED ▼ From 03/01/2010 To 03/15/2010

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

☐ Category :  

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


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





Current location /Documents/Live


A word or phrase in content

Operator and ▼

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

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

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

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 4.99.**

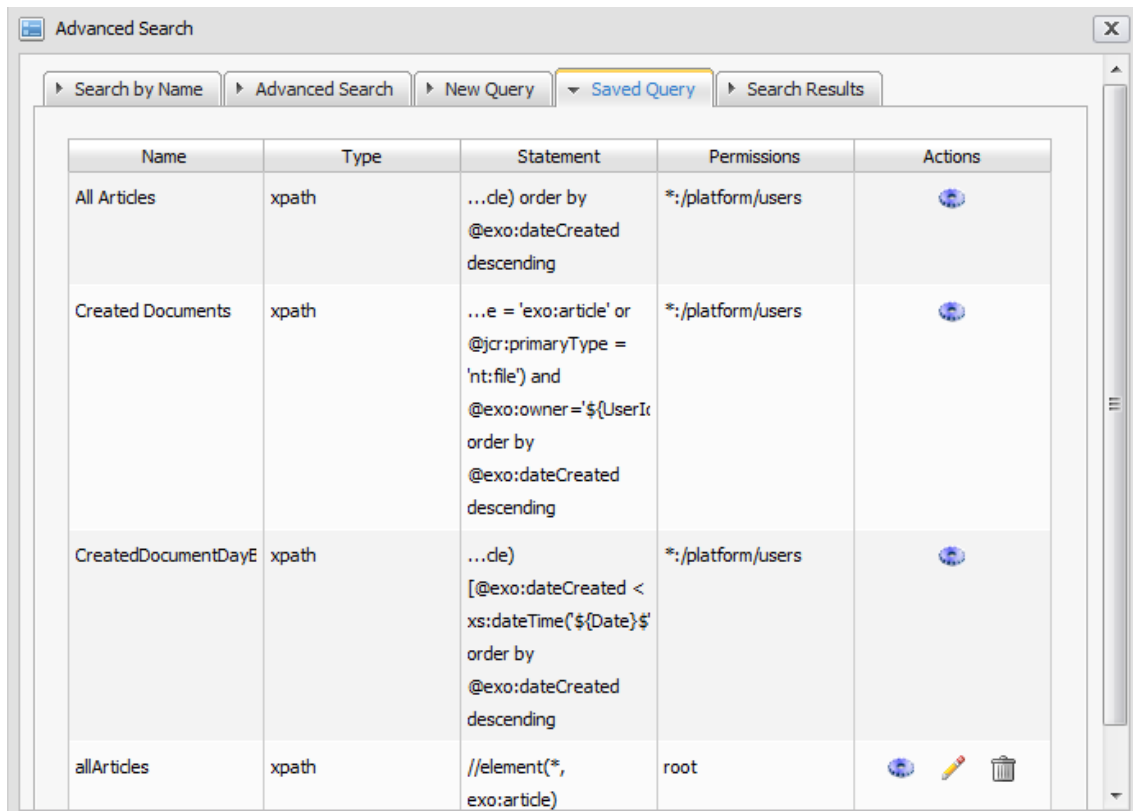
1. Enter a unique name for this query in the **Name** field.
2. Choose a query type from the drop down menu; **SQL** or **xPath**
3. Enter a query statement.
4. Click **Search** to perform the search and display the results in the **Search Results** tab.

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 perform 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:

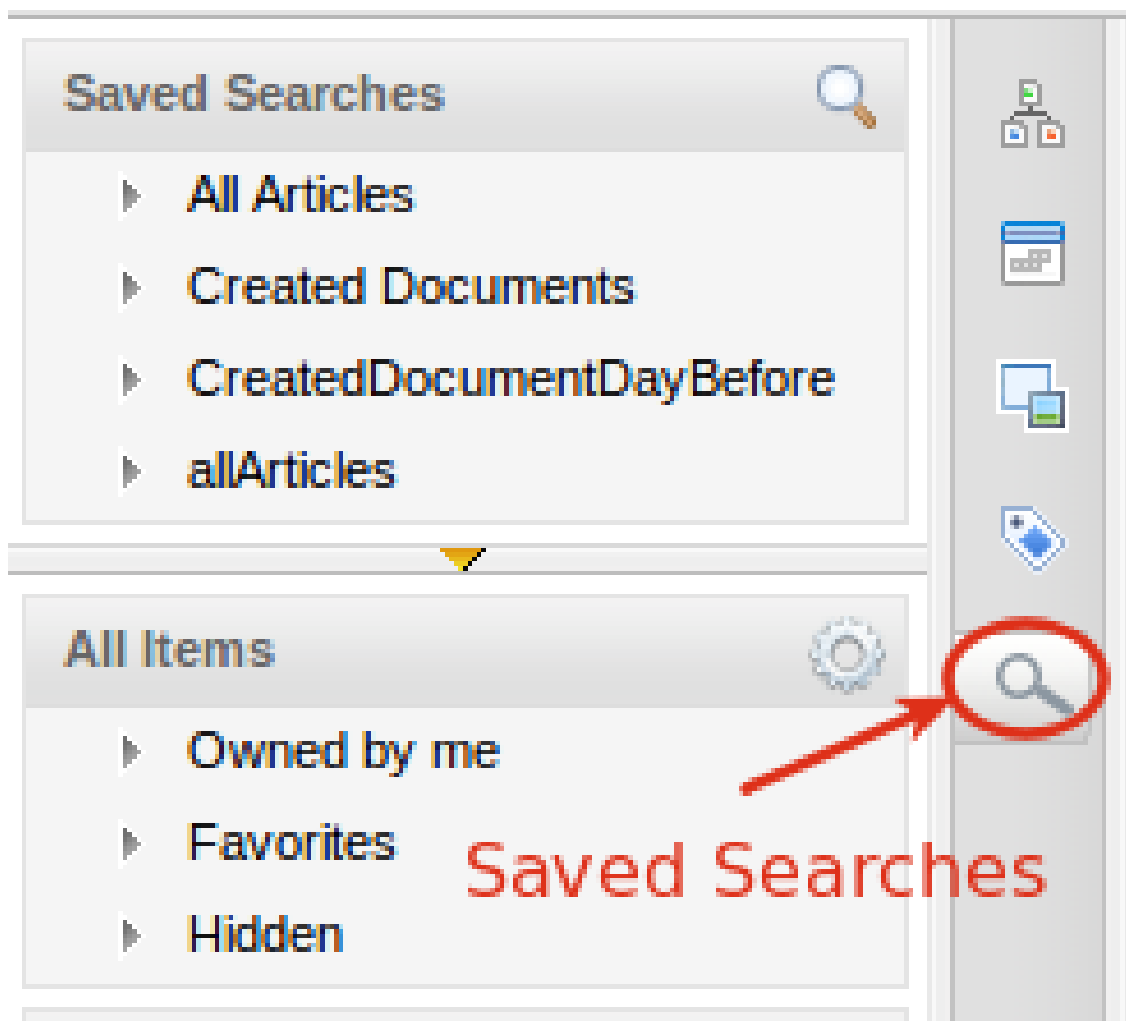
#### Procedure 4.100.

1. Click

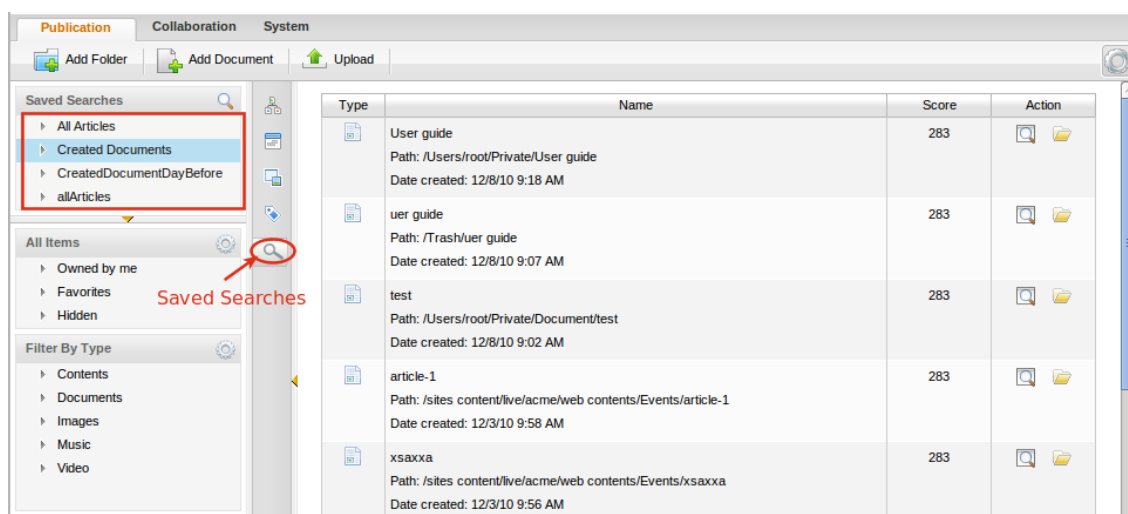
the



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 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 4.101.

1. Click on



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

The **Preference Setting** window will appear:

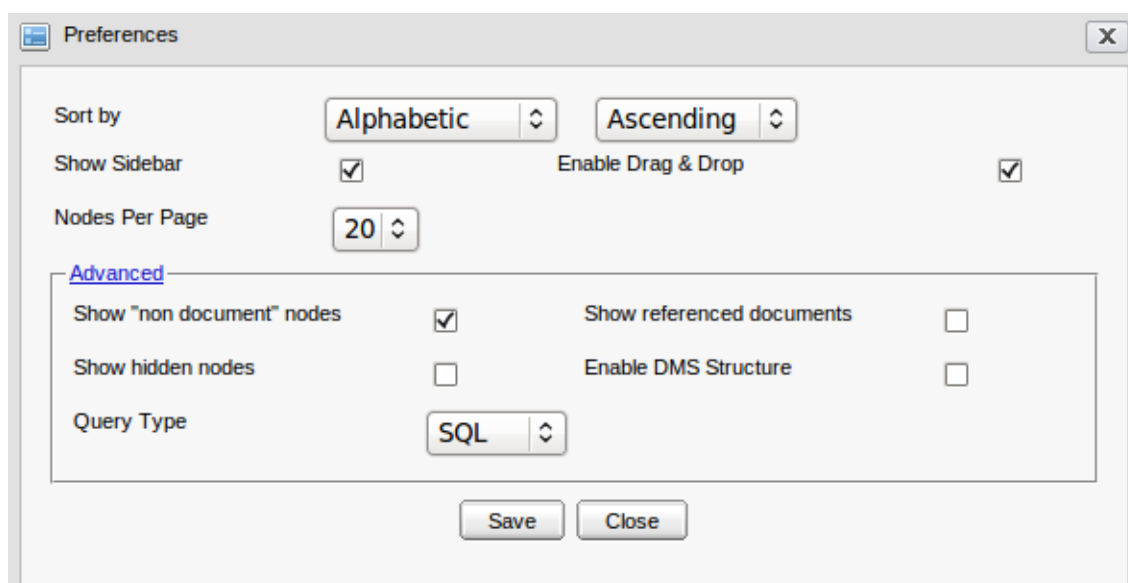


Table 4.19.

Setting	Details
Sort by	This condition is used to sort nodes in nodes list.
Show sidebar	This option is to display a sidebar.
Enable drag and drop	This option is to allows taking the “drag and drop” action or not.
Nodes per page	This number of nodes that will be displayed per page.
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.
Query Type	This query type.
Enable DMS structure.	This option is to display nodes in a document in tree structure.

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

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

## 4.10. Newsletters

eXo Content 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.

Do the following to subscribe to newsletters from eXo Service:

1. Go to **Newsletters** on the navigation bar. The Newsletters page will appear:

Overview News **Newsletters** Contact Us

**NEWSLETTERS**

Your Email  \*

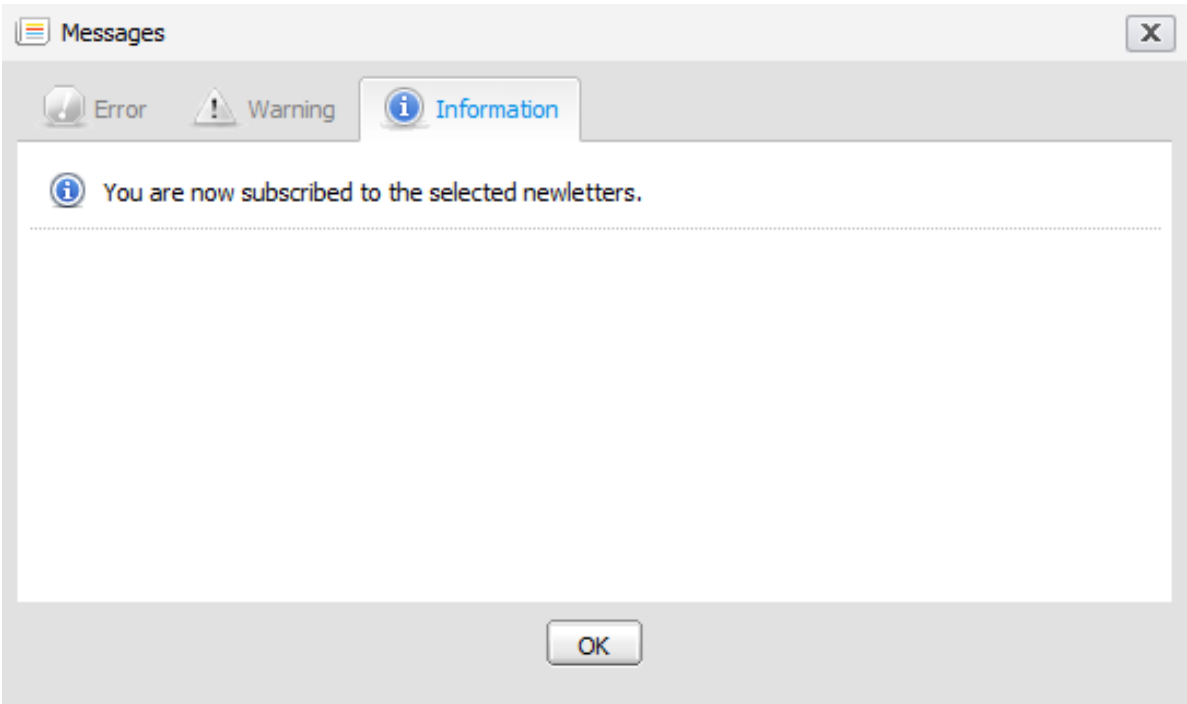
**Marketing** You want to know where we are, where we go ?

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

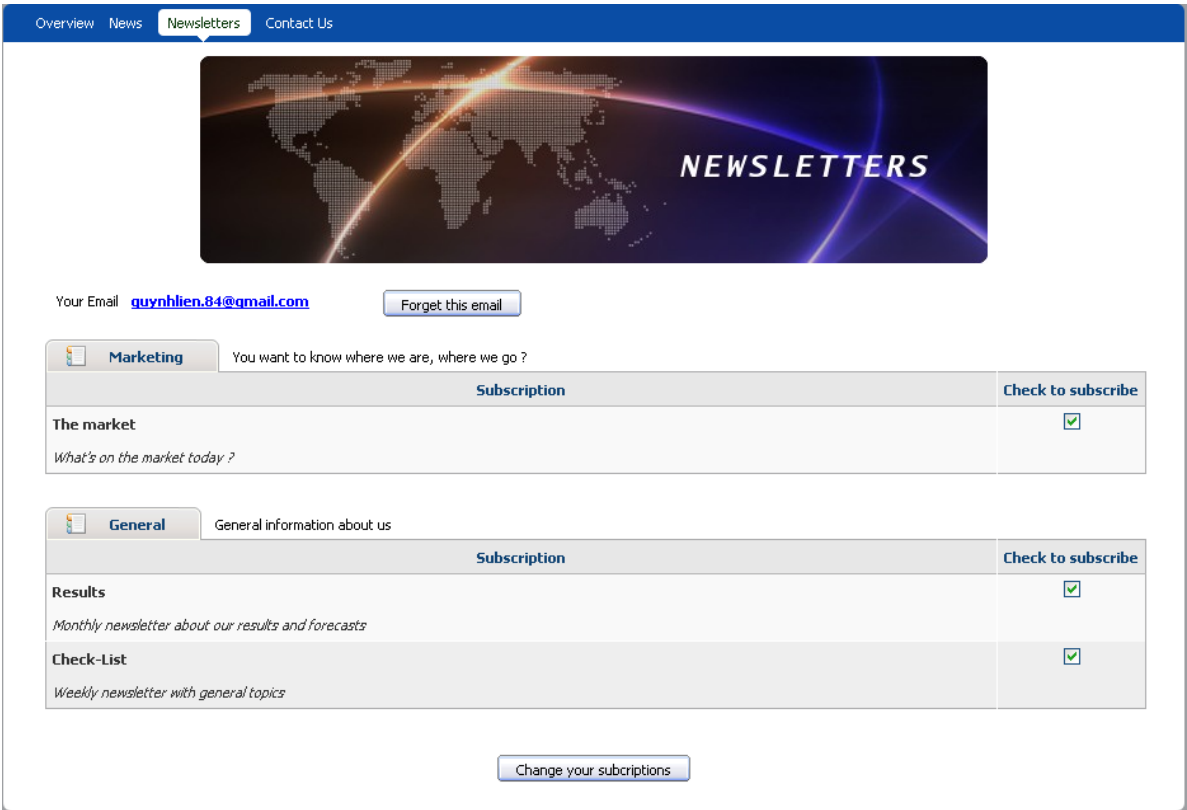
**General** General information about us

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

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. Manage Newsletters

eXo Content facilitates administrators to easily and quickly manage and control newsletters. Go to **Group > Newsletters** on the administration bar to access Newsletters.

Subscription	Number of User	Awaiting Letter
The market	0	0

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

### 4.10.2.1. Category Management

This section details category management.

#### 4.10.2.1.1. Add a new category

#### Procedure 4.102. Add a new category

1. Click **New Category** on the action bar of the Newsletters page. The Category form will appear.

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

- Name:** A text input field with an asterisk (\*) indicating it is required.
- Title:** A text input field with an asterisk (\*) indicating it is required.
- Description:** A large text area for entering a brief description of the category.
- Moderator:** A text input field with an asterisk (\*) and three icons (a yellow head, a blue head, and a trash can) indicating a user selection interface.
- Buttons:** 'Save' and 'Cancel' buttons at the bottom.

Table 4.20. Category Form Field Details

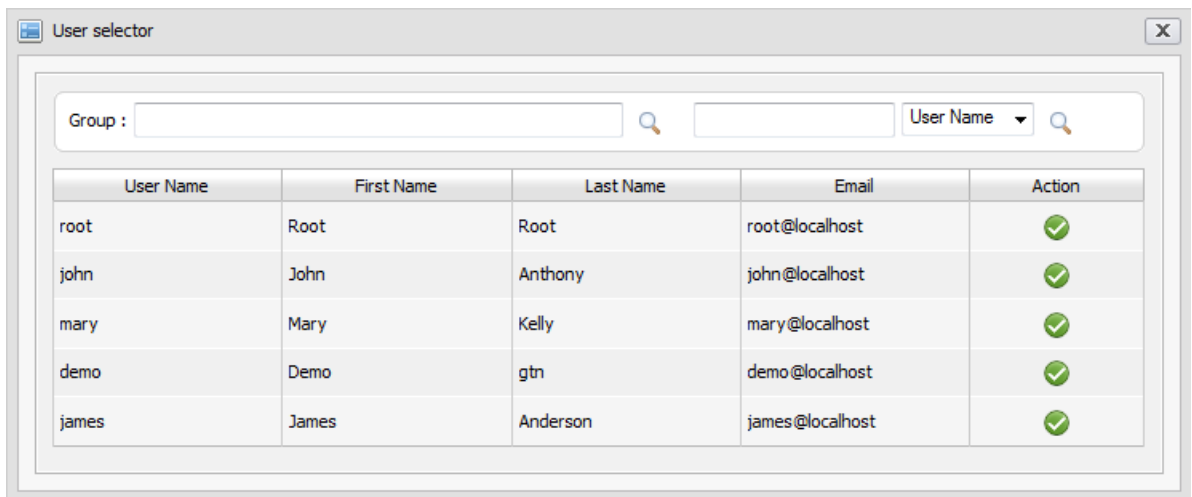
Field	Description
Name	The name of a category. This field is required.
Title	The title of a category. This field is required.
Description	A brief description of the category.
Moderator	Allows an administrator to select which memberships what group can manage this category.
Save	Accepts the addition of 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.



User selector

Group :   User Name

User Name	First Name	Last Name	Email	Action
root	Root	Root	root@localhost	
john	John	Anthony	john@localhost	
mary	Mary	Kelly	mary@localhost	
demo	Demo	gtn	demo@localhost	
james	James	Anderson	james@localhost	

3. Click

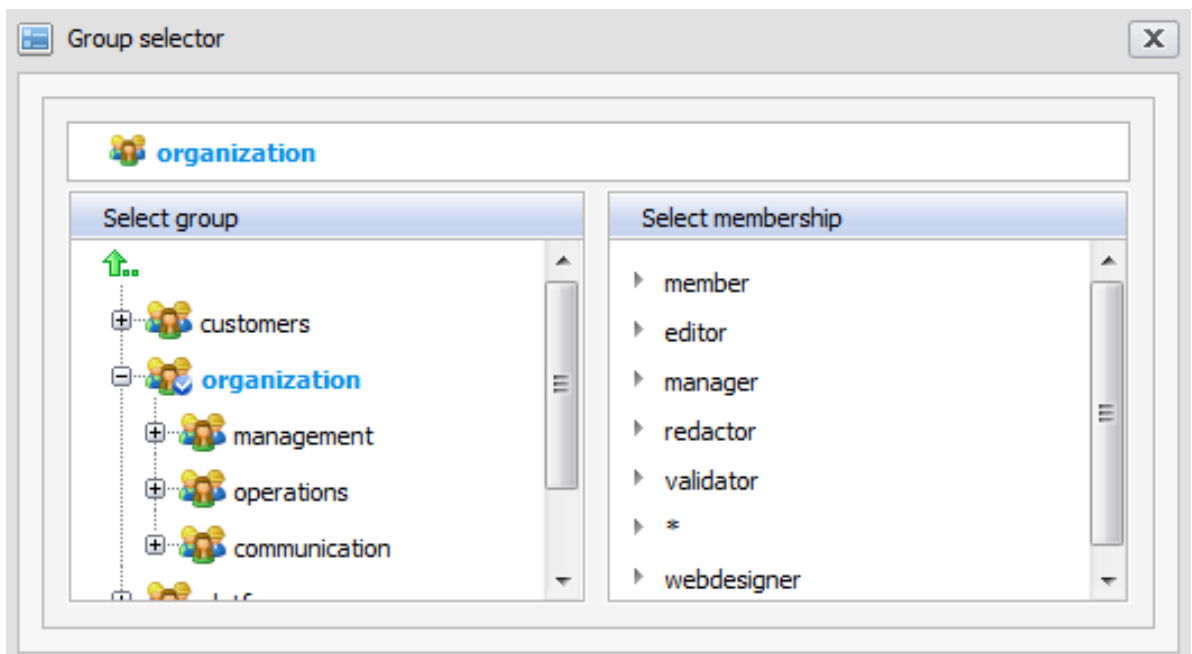


to select a user in the list.

4. Click



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



Group selector

organization

Select group

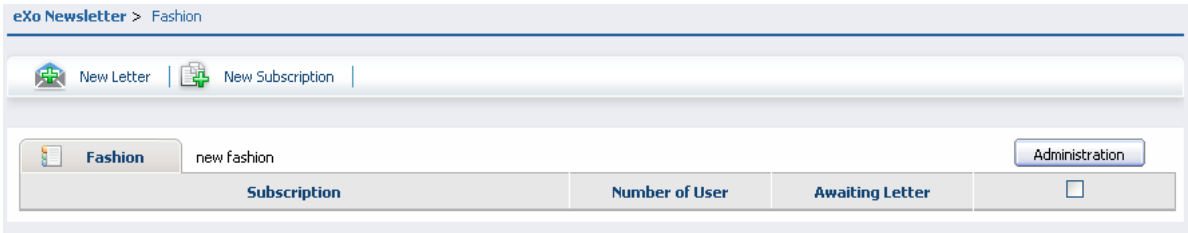
- ..
- customers
- organization
- management
- operations
- communication

Select membership

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

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. Select a category that you want to edit > Click **Administration > Edit Category** to bring up the Category form.

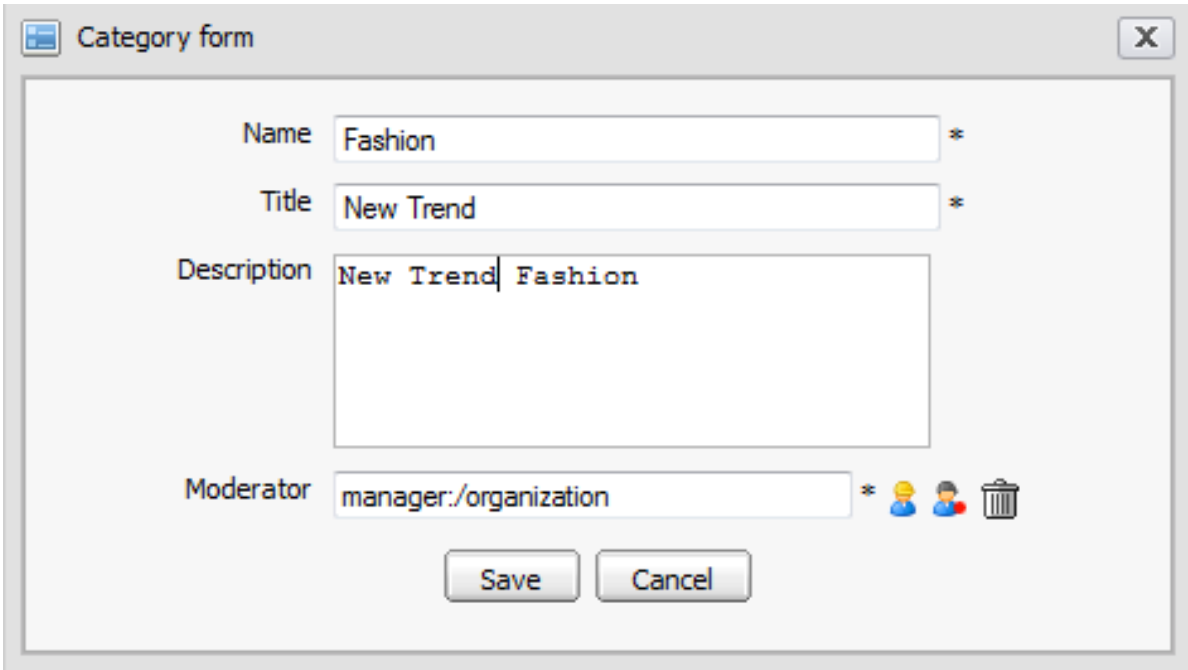


Table 4.21. Category Form Field Details

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

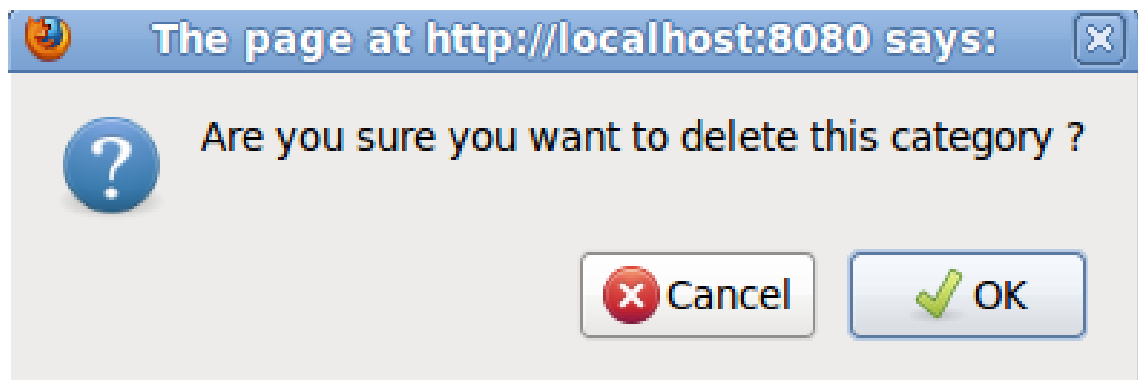
Field	Description
	this category by selecting membership and group. This field cannot be changed.
Save	Accepts the changes made to the category.
Cancel	Quits the category form without saving changes.

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 4.103. 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 4.104.

1. Click **Administration > Manage Users** in the menu. The **Manage Users** form will appear:

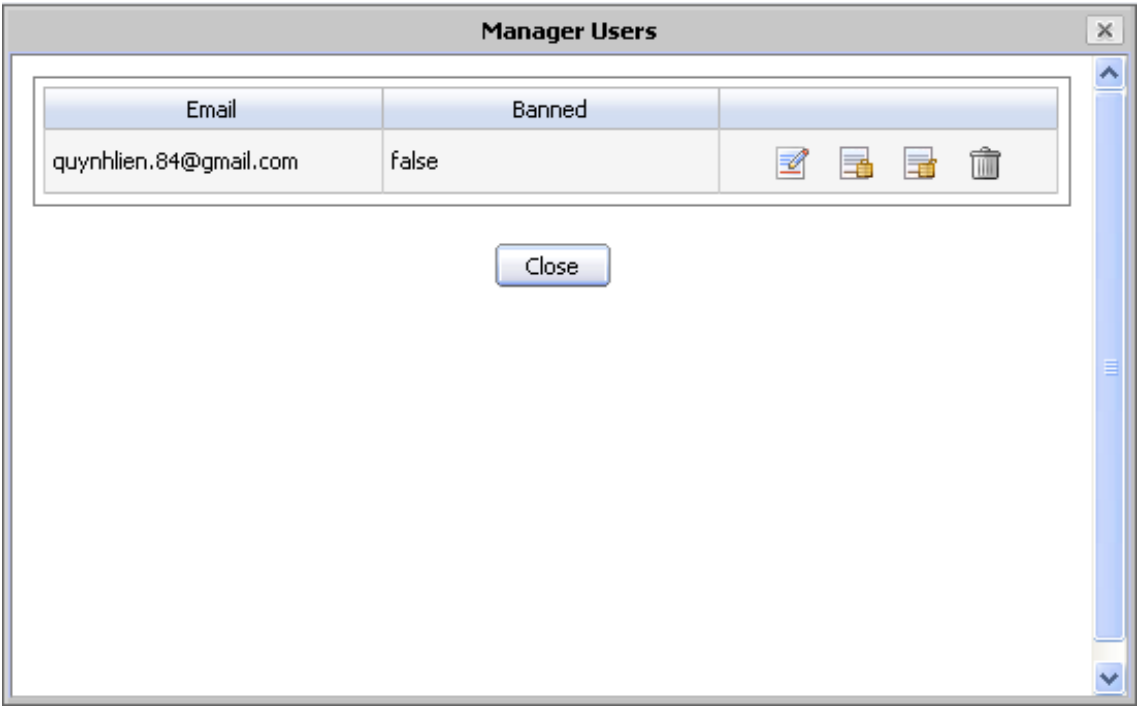






Table 4.22.

Field	Details
Email	The email address of user who has subscribed this subscription.
Banned	This field has two values:  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 4.105. Method One

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

The **Subscription form** will appear:

The screenshot shows a 'Subscription form' dialog box. It contains the following fields:

- Category:** A dropdown menu currently showing 'Marketing'. A red box highlights the dropdown arrow, and a red arrow points to it with the text 'Select category'.
- Name:** A text input field with an asterisk (\*) indicating it is required.
- Title:** A text input field with an asterisk (\*) indicating it is required.
- Description:** A large text area.
- Redactor:** A text input field with an asterisk (\*) and three icons (a person, a group of people, and a trash can) indicating it is required.

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

**Table 4.23.**

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

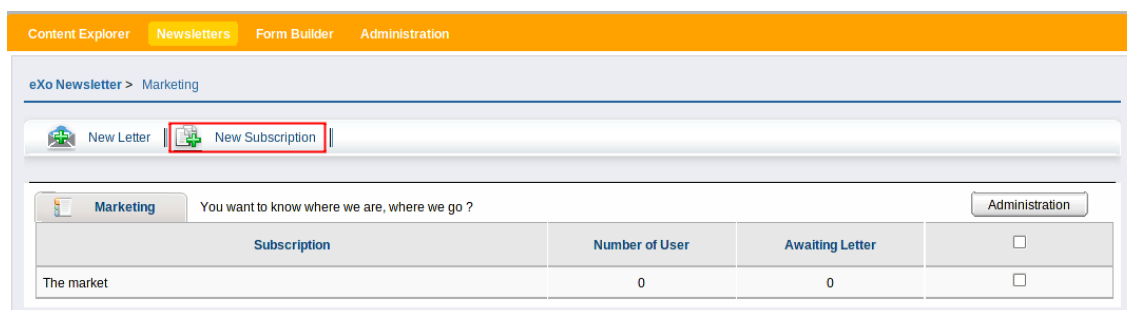


and select the category from the drop-down menu.

3. Enter the rest of their values in the form.
4. Click **Save** to create the new subscription or **Cancel** to quit without creating a new subscription.

### Procedure 4.106. Method Two

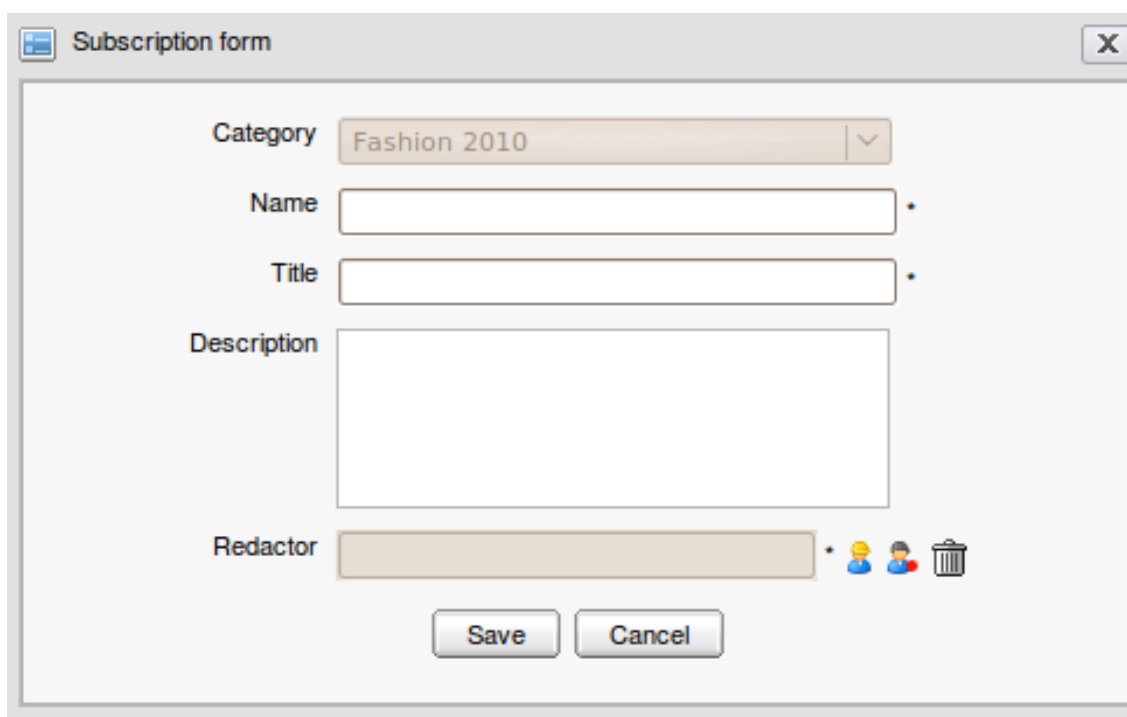
1. Click directly on the category that you want to create a new subscription to:

The screenshot shows the 'eXo Newsletter > Marketing' interface. At the top, there's an orange navigation bar with 'Content Explorer', 'Newsletters', 'Form Builder', and 'Administration'. Below it, a breadcrumb trail shows 'eXo Newsletter > Marketing'. A toolbar contains 'New Letter' and 'New Subscription' (highlighted with a red box). Below the toolbar, a 'Marketing' tab is active, displaying a table with columns: 'Subscription', 'Number of User', 'Awaiting Letter', and an unchecked checkbox. The table has one row with the value 'The market' under 'Subscription', '0' under 'Number of User', '0' under 'Awaiting Letter', and another unchecked checkbox. An 'Administration' button is in the top right corner of the table area.

Subscription	Number of User	Awaiting Letter	
The market	0	0	<input type="checkbox"/>

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

The **Subscription form** will appear:

The screenshot shows a 'Subscription form' window. It contains the following fields: 'Category' (a dropdown menu with 'Fashion 2010' selected), 'Name' (a text input field), 'Title' (a text input field), 'Description' (a large text area), and 'Redactor' (a dropdown menu with user icons). At the bottom, there are 'Save' and 'Cancel' buttons.

Category: Fashion 2010

Name: [Text Input]

Title: [Text Input]

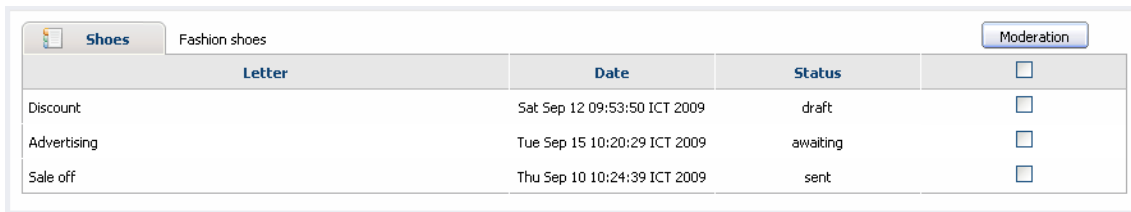
Description: [Text Area]

Redactor: [User Selection]

Buttons: Save, Cancel

Administrators can create newsletters for each subscriptions.

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



Letter	Date	Status	
Discount	Sat Sep 12 09:53:50 ICT 2009	draft	<input type="checkbox"/>
Advertising	Tue Sep 15 10:20:29 ICT 2009	awaiting	<input type="checkbox"/>
Sale off	Thu Sep 10 10:24:39 ICT 2009	sent	<input type="checkbox"/>

**Table 4.24.**

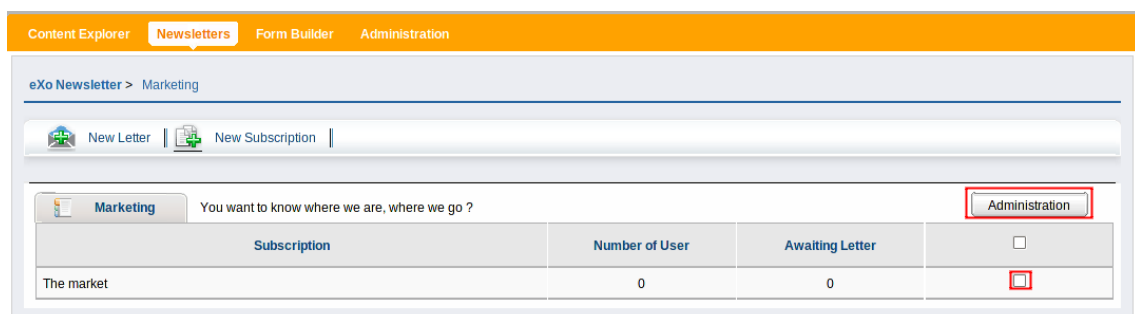
Element	Details
<b>Shoes</b>	The name of the subscription.
<b>Fashion Shoes</b>	The brief description about the subscription.
<b>Letter</b>	The list of all letters of this subscription.
<b>Date</b>	The date and time when creating this letter.
<b>Status</b>	There are three types of status: draft, awaiting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

#### 4.10.2.3. Open a Newsletter

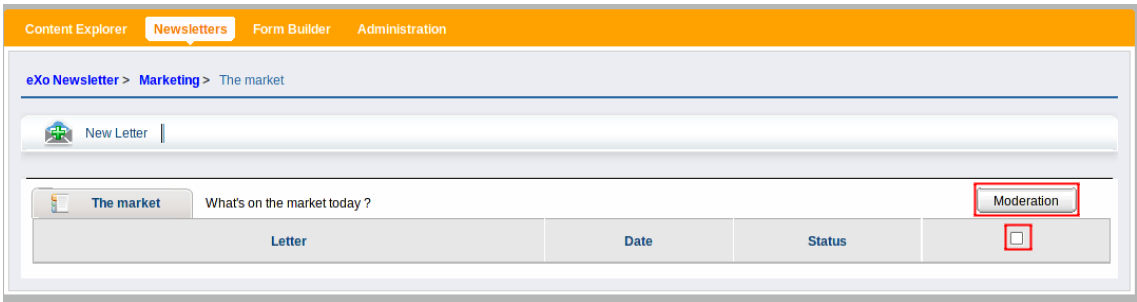
Administrators can easily view the content of a newsletter.

#### Procedure 4.107.

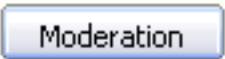
1. Choose a category by left-clicking it or checking the box and then selecting **Administration > Open**.



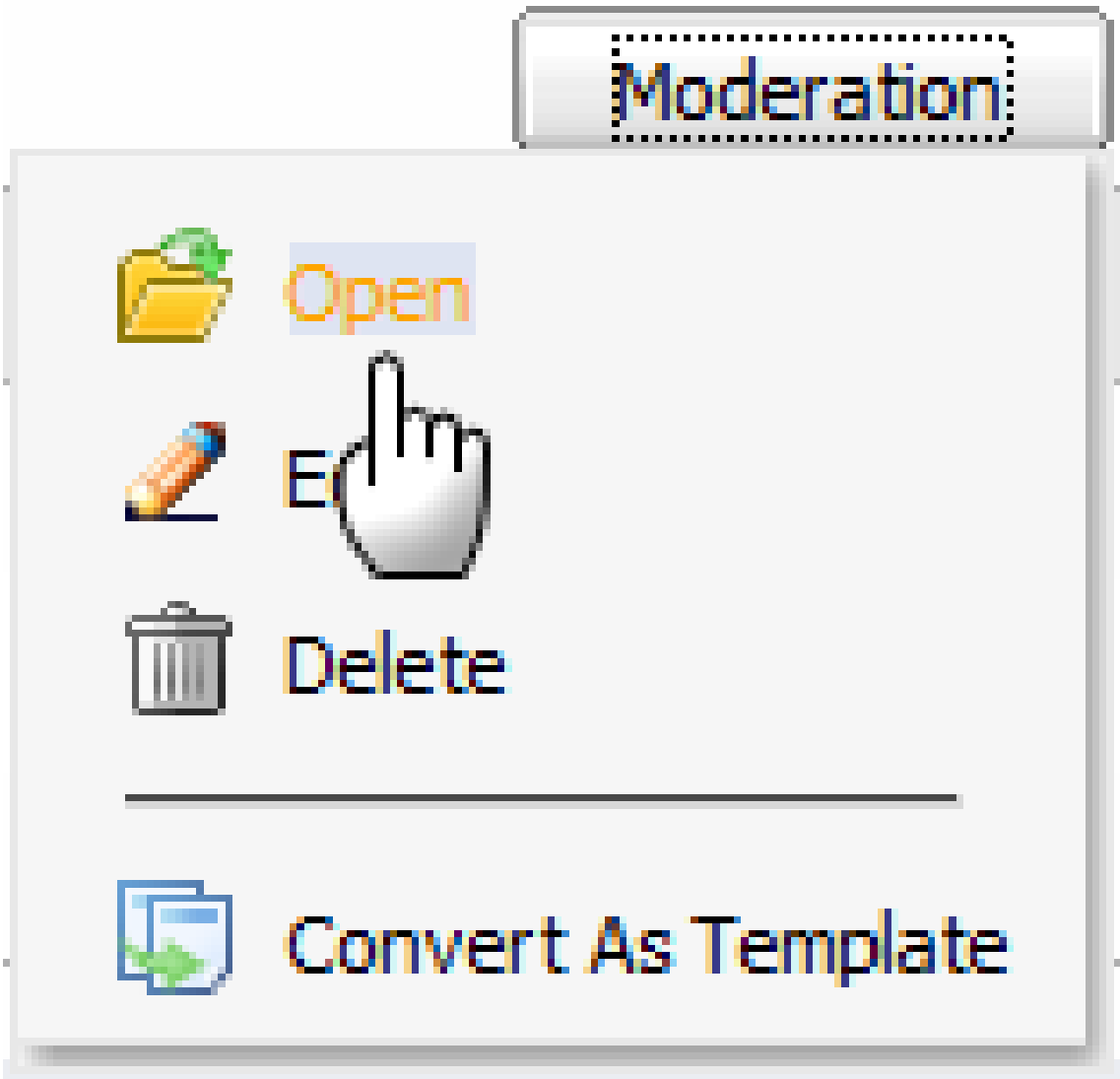
2. Select the newsletter that you want to open by left-clicking it, or selecting the checkbox.



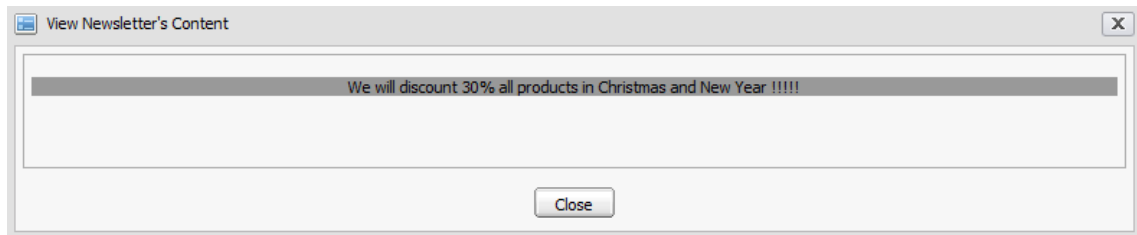
3. Click the



button, then select **Open** in the menu:



The **View Newsletter's Content** form will appear:



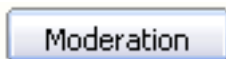
4. Click **Close** to exit.

#### 4.10.2.4. Edit a newsletter

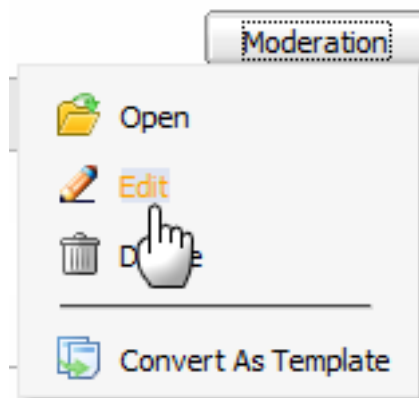
Do the following to edit a newsletter.

#### Procedure 4.108. Edit a newsletter

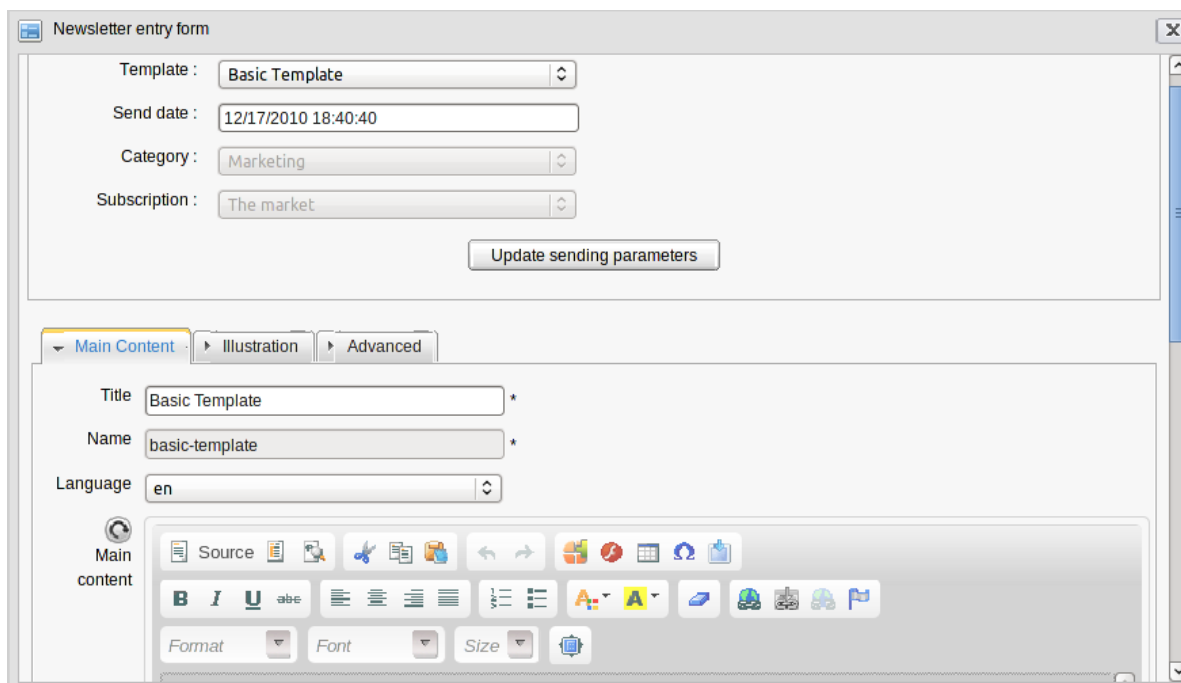
1. In a specific subscription, select the newsletter you want to edit by selecting the checkbox.
2. Click



, then select **Edit** in the menu.



The **Newsletter entry form** will appear:



The screenshot shows a web application window titled "Newsletter entry form". It contains several input fields and a button. The fields are: "Template" (dropdown menu showing "Basic Template"), "Send date" (text input showing "12/17/2010 18:40:40"), "Category" (dropdown menu showing "Marketing"), and "Subscription" (dropdown menu showing "The market"). Below these fields is a button labeled "Update sending parameters". Below the button is a tabbed interface with three tabs: "Main Content" (selected), "Illustration", and "Advanced". The "Main Content" tab is active and shows fields for "Title" (text input showing "Basic Template"), "Name" (text input showing "basic-template"), and "Language" (dropdown menu showing "en"). Below these fields is a rich text editor with a toolbar containing icons for Source, Bold, Italic, Underline, Text color, Background color, Bulleted list, Numbered list, Indent, Outdent, Link, Unlink, and a "Format" dropdown menu. The "Main content" label is on the left side of the rich text editor.

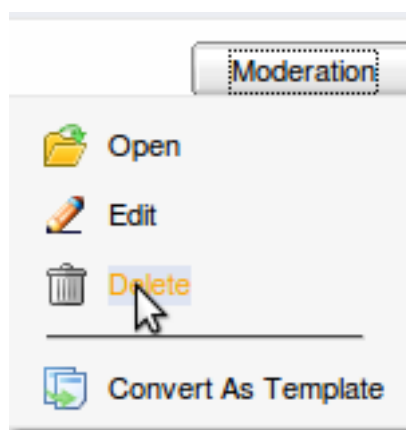
3. Change the values in the fields that you want to edit: **Template**, **Send date**, **Category**, **Subscription**.
4. Click the **Update a Newsletter's info** button.
5. Change the values in the fields **Title** and **Main content**.
6. Click **Save** to save as draft, or click **Send**.

### 4.10.2.5. Delete a newsletter

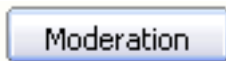
Administrator can delete obsolete newsletters.

#### Procedure 4.109. Delete a newsletter

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

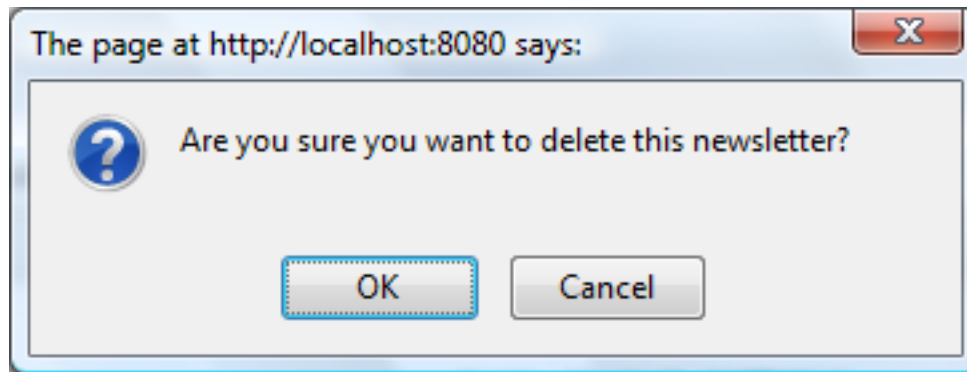


- Click



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

The confirmation message will be displayed:



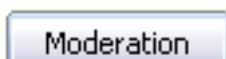
- Click **OK** to accept deleting this newsletter, or **Cancel** to quit without deleting.

#### 4.10.2.6. Convert as Template

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

#### Procedure 4.110. Convert to template

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

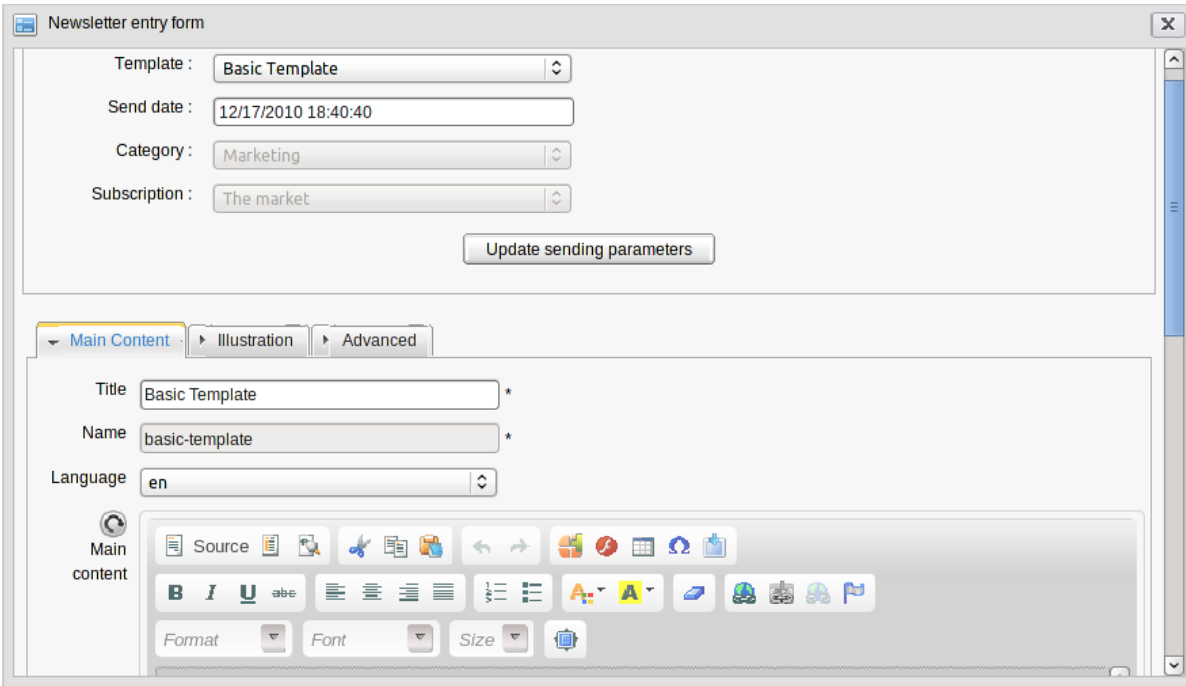
Each subscription consists of many newsletters. **WCM** helps you easily create newsletters by following these steps.

#### Procedure 4.111. Creating Newsletters

- Go to **Group > Newsletters** on the administration bar. The eXo Newsletter appears.
- Click



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



Details:

Table 4.25.

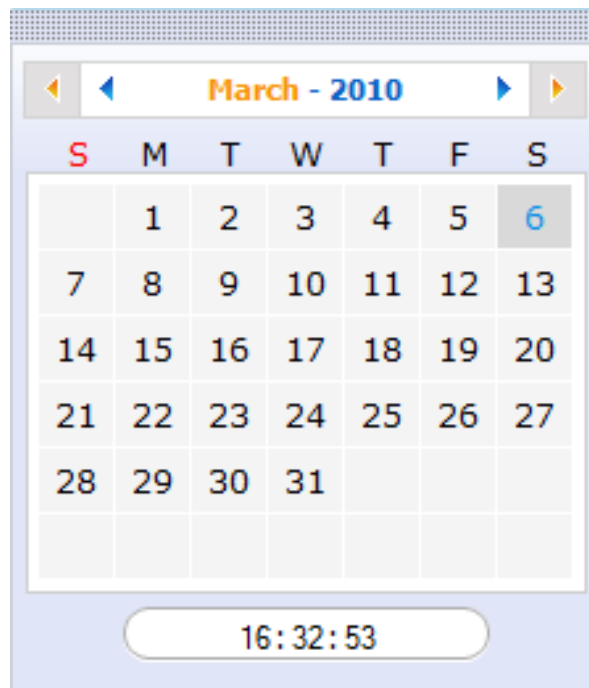
Field	Details
Template	The template that you select for your newsletter form.
Send date	The date and time when you want to send this newsletter.
Category	The category contains this newsletter.
Subscription	The subscription contains this newsletter.
Update sending parameters	This button allows you to 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.

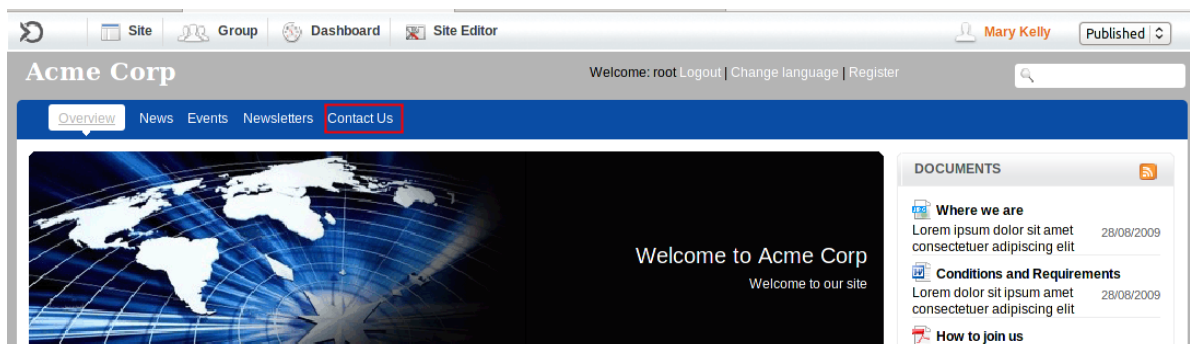


5. Click

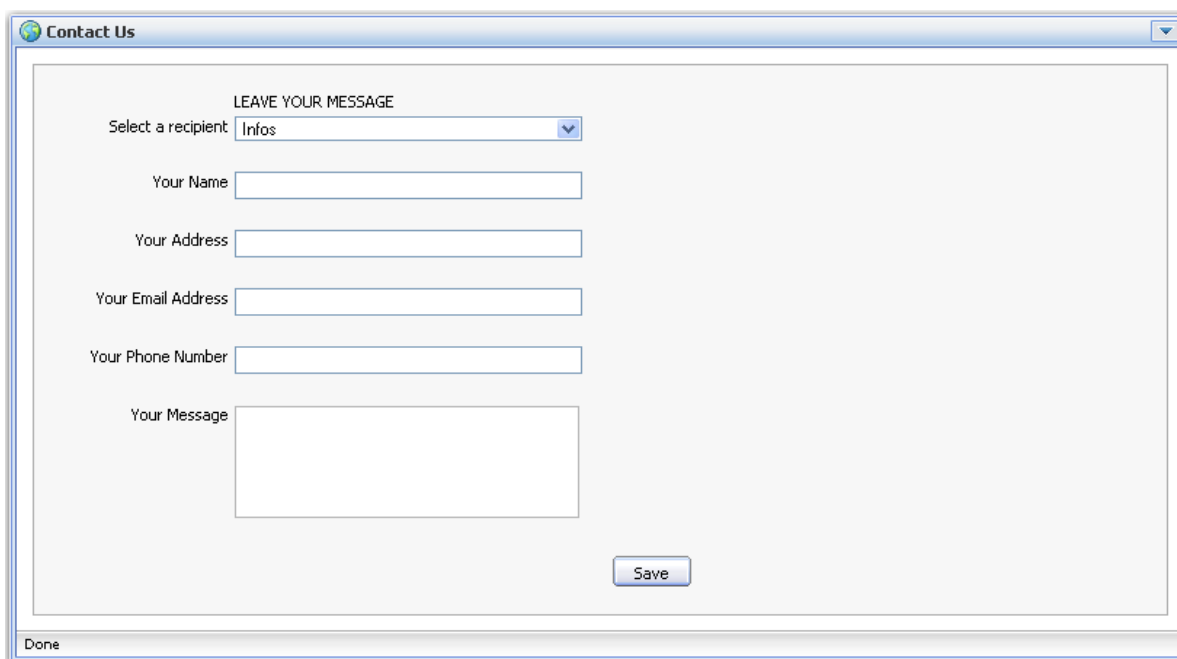


in the category field to select the category and the subscription in list.

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 navigation bar, or go to **Site > Acme > Contact Us**.



The **Contact Us** page will appear:



**Table 4.26.**

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** portlet on the navigation bar:

### Procedure 4.112.

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

The **Contact Us** page will appear:

The screenshot shows a web application interface for 'Acme Corp'. At the top, there's a header with the company name, a user welcome message 'Welcome: root Logout | Change language | Register', and a search bar. Below the header is a navigation bar with links: 'Overview', 'News', 'Events', 'Newsletters', and 'Contact Us'. The 'Contact Us' link is highlighted. The main content area is titled 'LEAVE YOUR MESSAGE'. It contains a form with the following fields: 'Select a recipient' (a dropdown menu with 'Infos' selected), 'Your Name', 'Your Address', 'Your Email Address', 'Your Phone Number', and 'Your Message'. A 'Save' button is located at the bottom right of the form area.

**Table 4.27.**

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.

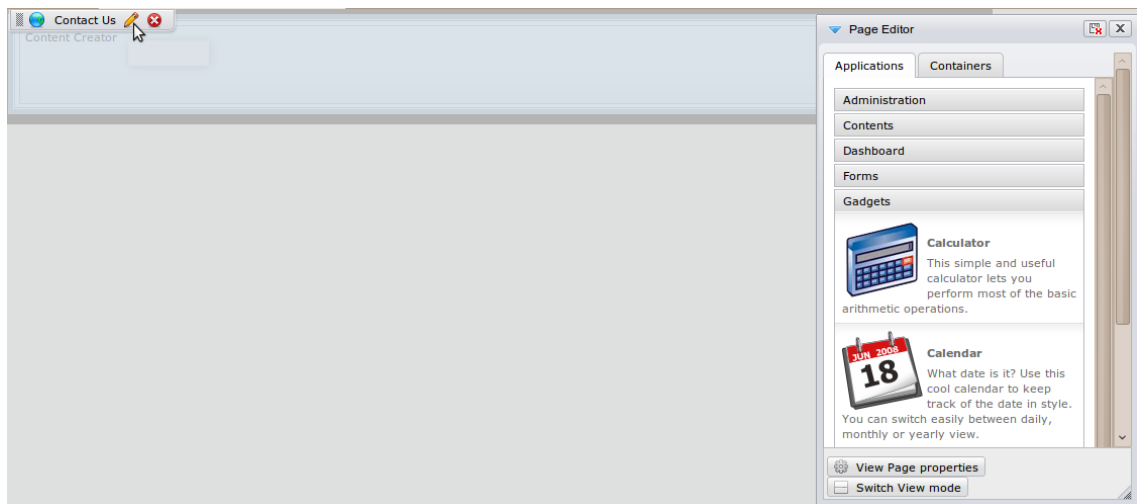
2. Select a recipient and complete the other values in the form.
3. Click **Save** to send a message.

#### 4.11.1. Edit Mode

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

### Procedure 4.113.

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:

**Edit Mode** | Portlet Setting | Select Icon | Decoration Themes | Access Permission

**Save location**

Location to save:

**Template options**

Select template:

Custom save button:

Custom save message:

Redirect: ☒

Redirect path:

**Actions**

Name	Description	Instance of	Action
No action			

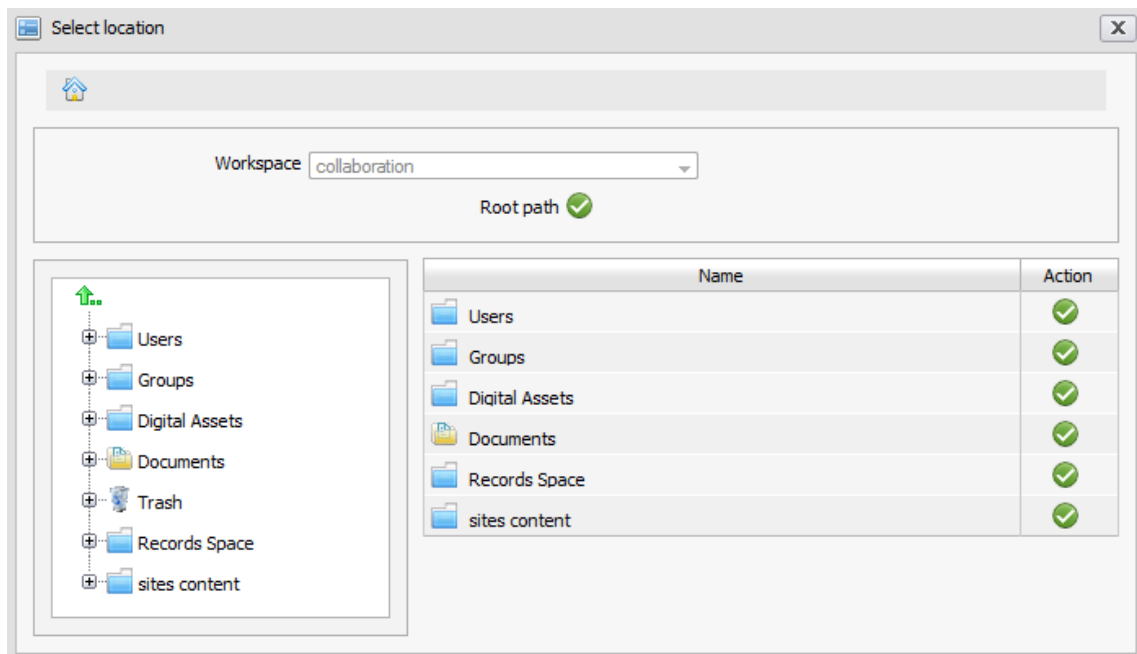
**Table 4.28.**

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:



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

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 Builder

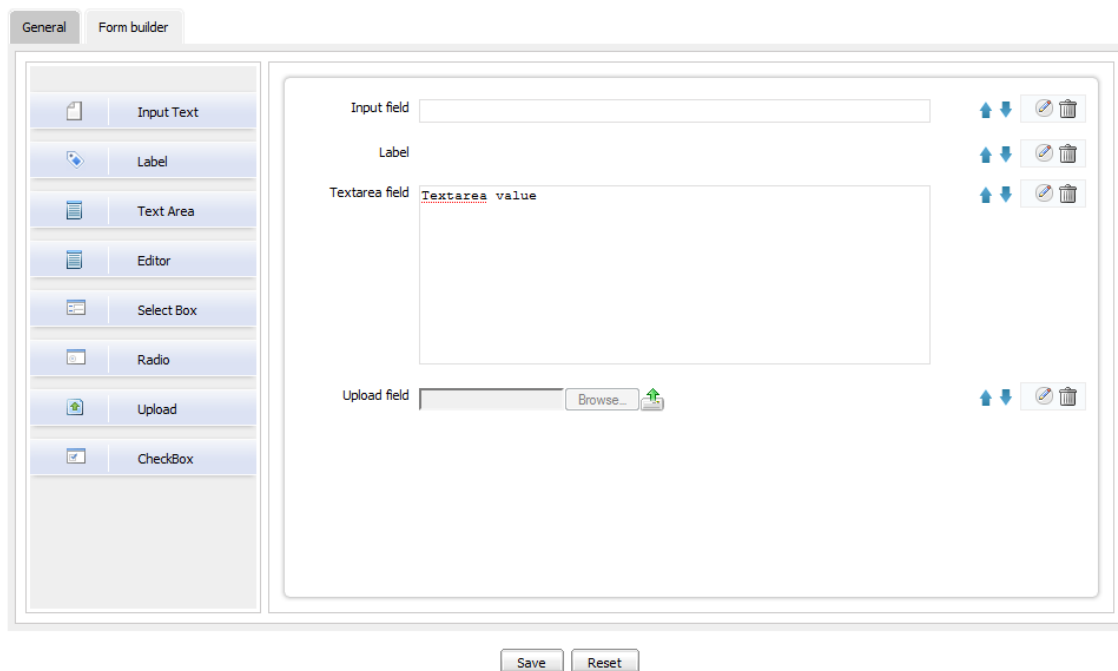
The **Form Builder** portlet enables users to create and to edit template of document types. Documents are stored in the so-called node; therefore, the term “node” and node types are often applied.

#### Procedure 4.114.

1. Go to **Group > Form Builder** on the **administration** bar. The **Form Builder** will appear:

The screenshot shows the 'Form Builder' portlet interface. At the top, there are two tabs: 'General' (selected) and 'Form builder'. Below the tabs, there is a 'Name' field containing the text 'Event'. A red box highlights the 'Name' field, and a red arrow points to it with the text 'The name of the node'. Below the 'Name' field is a 'Description' field containing the text 'The hottest events|'. Below the 'Description' field is a toolbar with various icons for text formatting (bold, italic, underline, list, link, unlink, quote, image, video, audio, size) and a 'Size' dropdown. At the bottom of the portlet are 'Save' and 'Reset' buttons.

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 you to set properties for a node. Available components are displayed on the left pane.



5. Click the desired components on the left pane. The selected components will be displayed on the right pane.

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:

Field Label

Title

Width

Height

Default Value

Guidelines for User

Rules: ☐ Required

Enter the field label

Table 4.29.

Field	Details
Field Label	To enter the field label.
Width	Enter the field width. If the checkbox in <div>Rules: <input type="checkbox"/> Required</div> 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 default value
Guidelines for User	To display instructions about this component.

To delete the component, click the



corresponding to the component.

Click



again to hide the form to edit the properties.

After editing the properties of the components, the components look like the below illustration:

The screenshot shows a form with the following elements:

- Title:** A text input field with a set of icons (up, down, edit, delete) to its right.
- Place:** A text input field with a set of icons (up, down, edit, delete) to its right.
- Summary:** A large text area containing the text "Textarea value" with a set of icons (up, down, edit, delete) to its right.
- Upload field:** A text input field with a "Browse..." button and a green upload icon to its right.

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

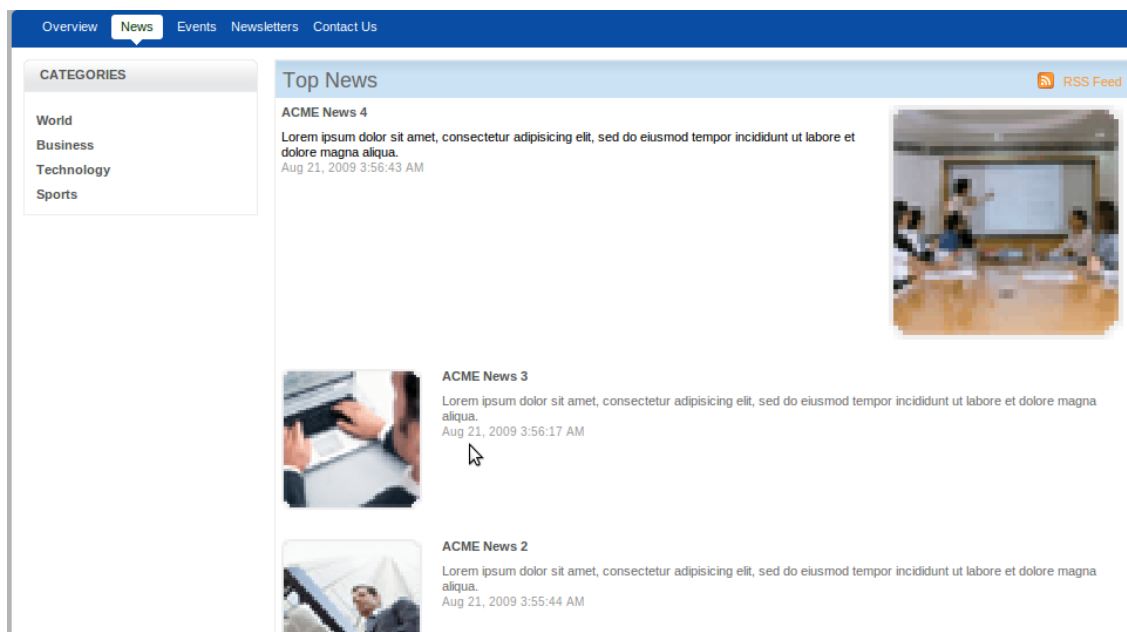
A message will inform that you created a node successfully.

## 4.13. Category Navigation

Category Navigation Portlet and Parameterized Content List Viewer portlet get rid of long URLs when you view a content and help users see published documents or webcontents in specific categories in one page. 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 4.115. Access to Category Navigation Portlet

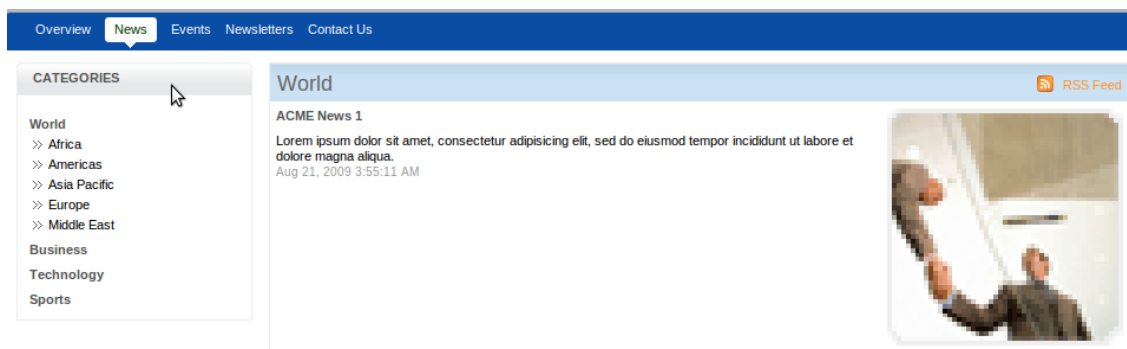
1. Go to **News** on the navigation bar:



The left panel lists all the categories containing documents or web contents.

The right panel 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:  
categorynavigation.png

#### Procedure 4.116.

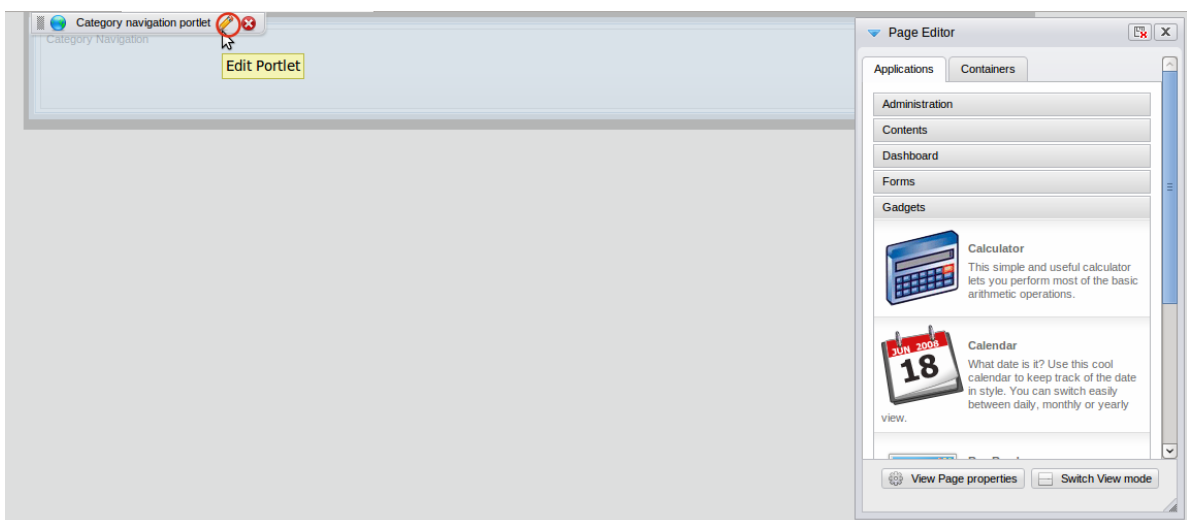
1. Go to **Group > Administration > Manage Pages** on the Administration bar. The Manage Pages will appear:

Administration				
Search: <input type="text"/>		Owner type <input type="text"/>	<input type="button" value="Search"/>	
Page Id	Title	Access Permission	Edit Permission	Action
group::/platform/web-contributors::Ec	Editor	[*/platform/web-contributors]	manager:/platform/web-contributors	
portal:exo::Girls	gamesgames	[manager:/customers, member:/part	author:/platform	
group::/platform/web-contributors::Si	Site Explorer	[*/platform/web-contributors]	manager:/platform/web-contributors	
group::/platform/web-contributors::W	WCM Administration	[manager:/platform/web-contributors	manager:/platform/web-contributors	
portal:acme::category	Category navigation portlet	[Everyone]	*/platform/administrators	
portal:acme::clv	Content List Viewer Portlet	[Everyone]	*/platform/administrators	
group::/platform/administrators::com	Community Management	[manager:/platform/administrators]	manager:/platform/administrators	
portal:acme::confirmation	Contact Form Confirmation	[Everyone]	editor:/platform/web-contributors	
portal:acme::contactus	Contact Us	[Everyone]	*/platform/web-contributors	
portal:acme::detail	Detail	[Everyone]	*/platform/administrators	

## 2. Click



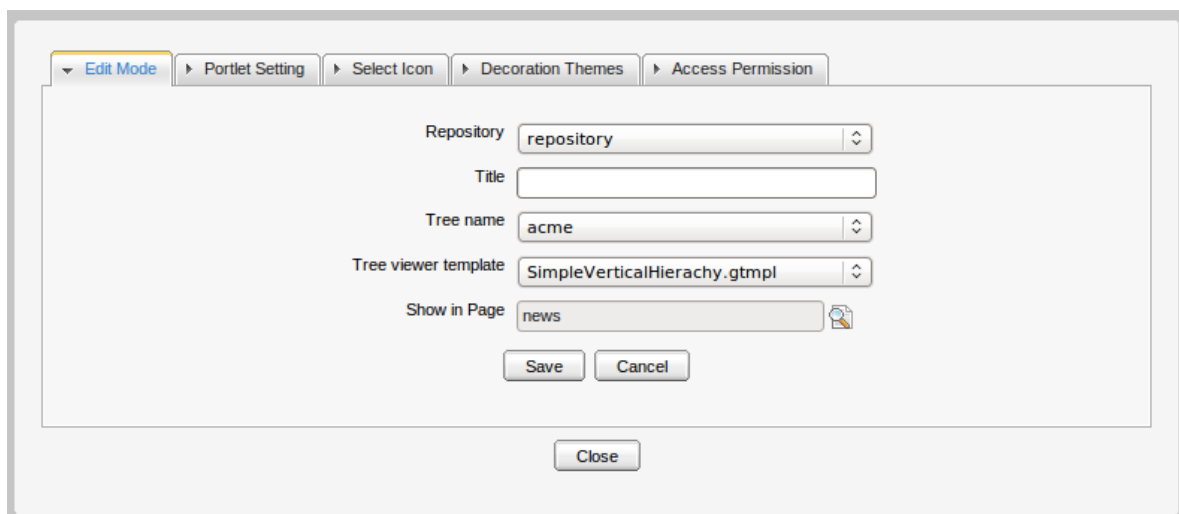
that corresponds with the Category navigation portlet to open the page for edit this portlet.



## 3. Click



to open a form with the Edit Mode to edit the portlet.



The screenshot shows a dialog box titled 'Edit Mode' with several tabs: 'Portlet Setting', 'Select Icon', 'Decoration Themes', and 'Access Permission'. The 'Portlet Setting' tab is active. It contains the following fields:

- Repository: A dropdown menu with 'repository' selected.
- Title: An empty text input field.
- Tree name: A dropdown menu with 'acme' selected.
- Tree viewer template: A dropdown menu with 'SimpleVerticalHierarchy.gtmpl' selected.
- Show in Page: A text input field with 'news' entered, and a small icon to its right.

At the bottom of the dialog are three buttons: 'Save', 'Cancel', and 'Close'.

4. Click



to select the repository for documents in the Repository field.

5. Input the name of a category in the Title field.

6. Select the tree name for a category.

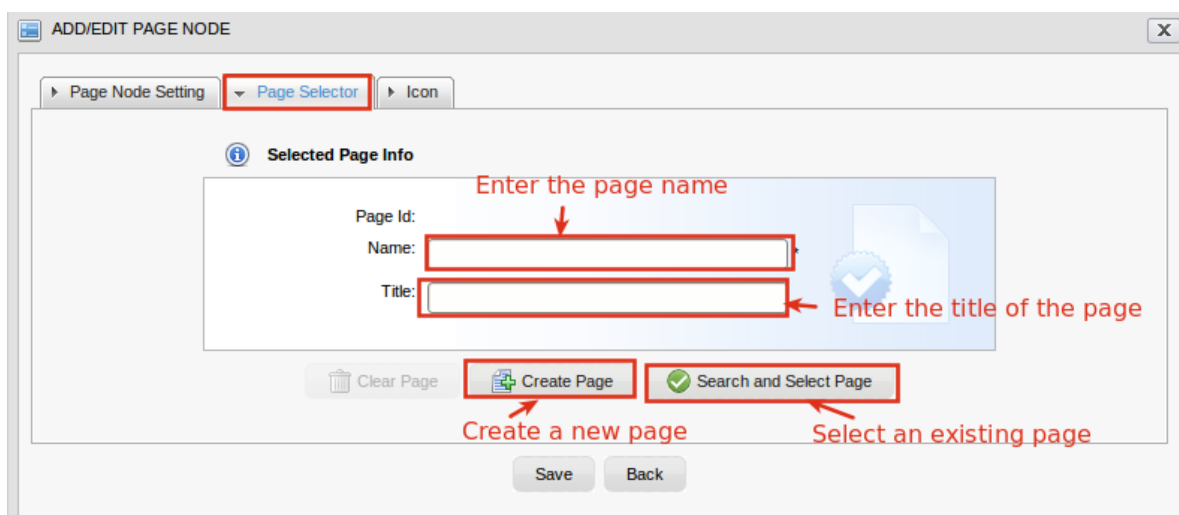
7. Select the template for displaying categories.

8. Click

the



icon to select the target path. The Page selector form will appear:



The screenshot shows a dialog box titled 'ADD/EDIT PAGE NODE' with tabs: 'Page Node Setting', 'Page Selector', and 'Icon'. The 'Page Selector' tab is active. It contains a section titled 'Selected Page Info' with the following fields:

- Page Id: A label.
- Name: A text input field with a red box around it and an arrow pointing to it with the text 'Enter the page name'.
- Title: A text input field with a red box around it and an arrow pointing to it with the text 'Enter the title of the page'.

Below the fields are three buttons: 'Clear Page', 'Create Page', and 'Search and Select Page'. The 'Create Page' and 'Search and Select Page' buttons are highlighted with red boxes. Arrows point to them with the text 'Create a new page' and 'Select an existing page' respectively.

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

9. Click



to select the navigation on the left pane. The corresponding pages will be displayed on the left pane and the corresponding paths will be displayed on the right pane.

10. Click

the



icon to select the path. This path will be displayed in the Show in page field.

11. Click **Save** to accept saving the configuration for the Category Navigation portlet.



# Advanced Actions

## 5.1. Set Up a Website



### Note

In **eXo Content**, 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.

However, only Administrators can create a new site.

### 5.1.1. Create a new site

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

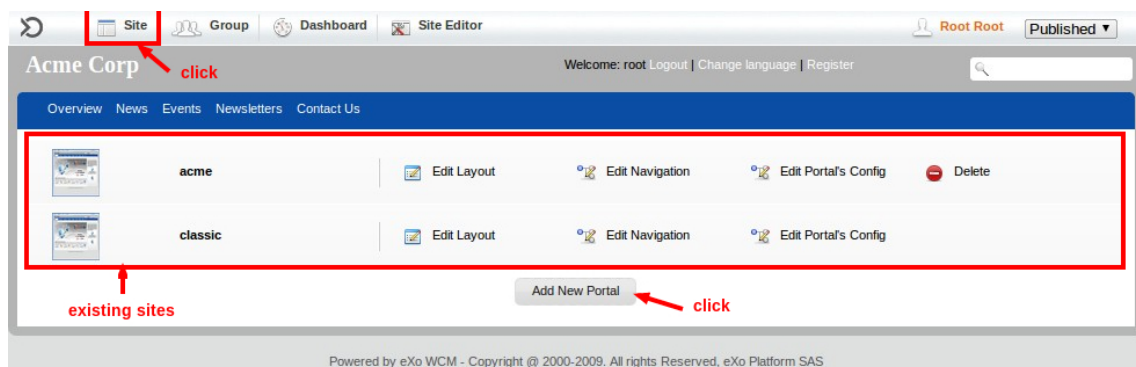
Do the following:

(\*): required

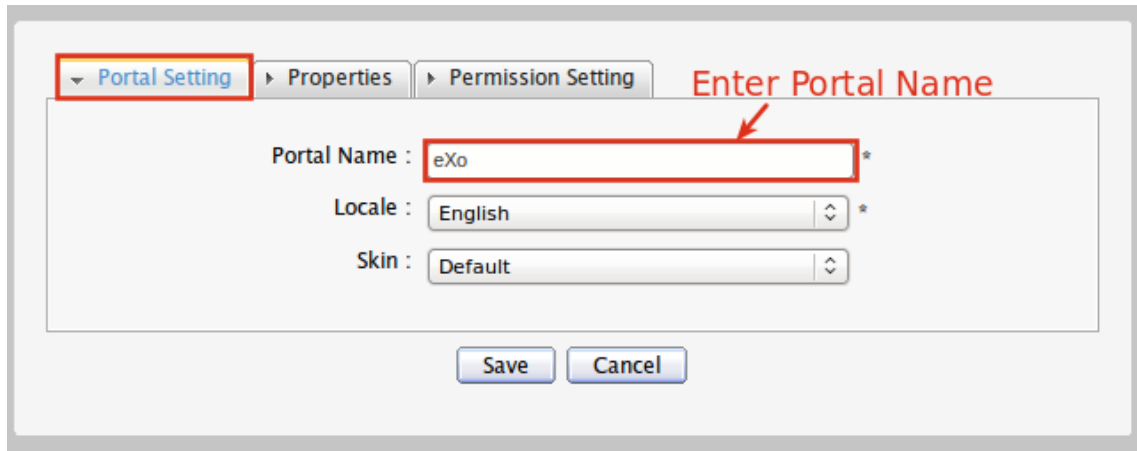
**Table 5.1. Details:**

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.

1. Click **Site** on the administration bar. A list of existing portals will be listed.



2. Click the **Add New Portal** button to open the form to add a new portal. In the **Portal Setting** tab, you can set some properties for this site.



Portal Setting Properties Permission Setting

Enter Portal Name

Portal Name : eXo \*

Locale : English \*

Skin : Default \*

Save Cancel

3. Keep session alive by clicking the **Properties** tab.

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

never:

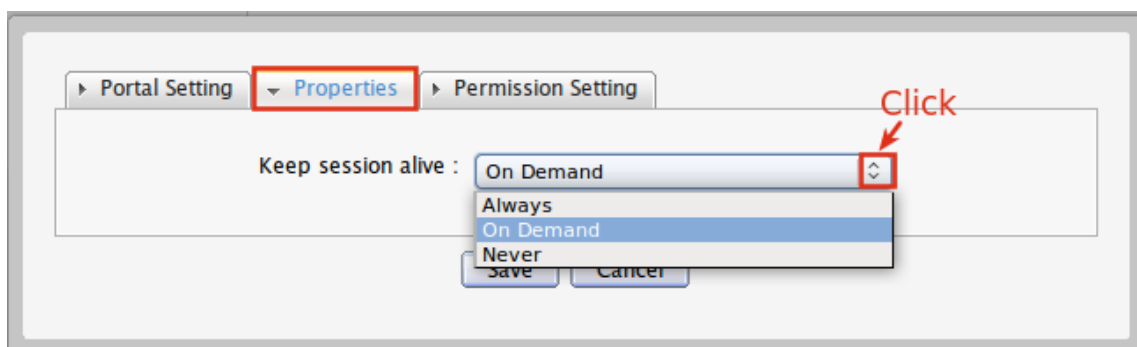
It never happens even if the application requests.

on demand:

It starts to be used as soon as the application requests.

always:

It is always enabled.



Portal Setting Properties Permission Setting

Keep session alive : On Demand

Always

On Demand

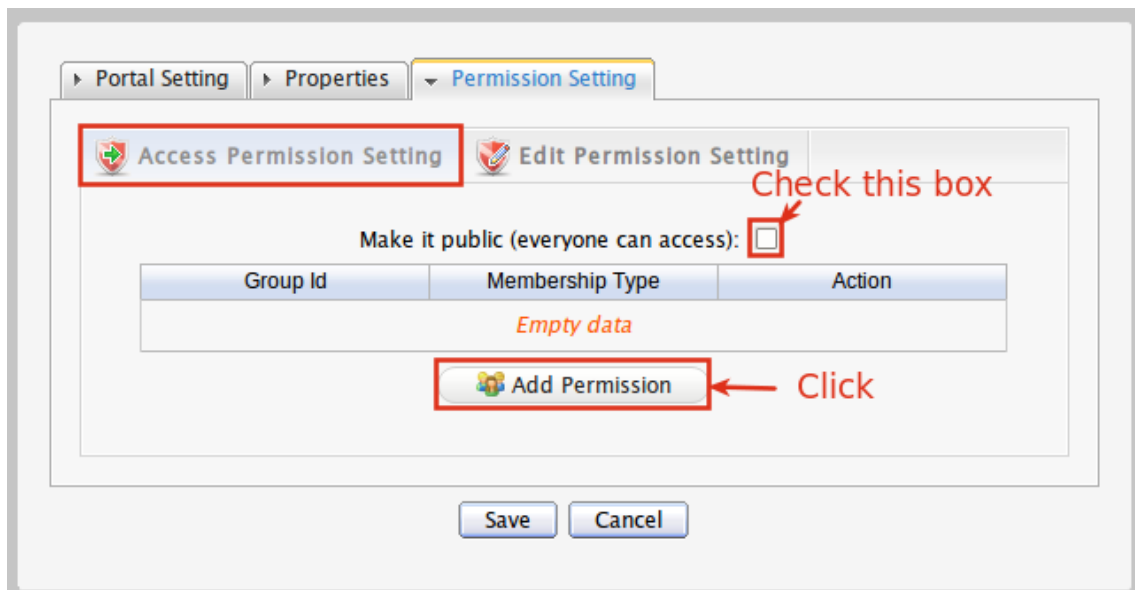
Never

Click

Save Cancel

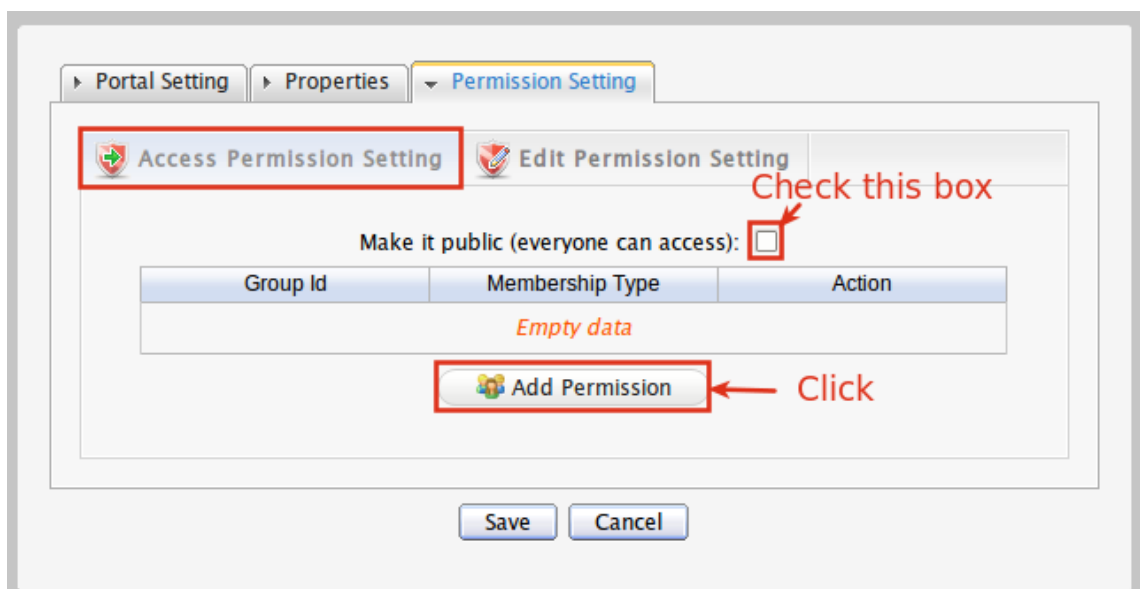
4. Click the **Permission Setting** tab to set access and edit permission for this portal.

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



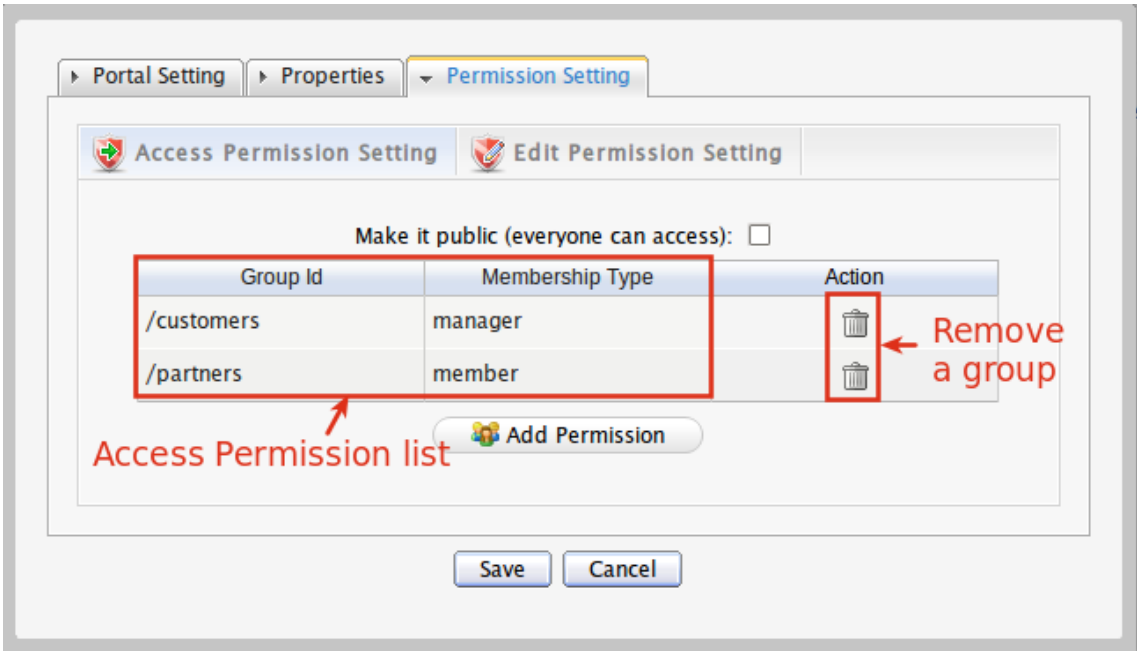
#### Access Permission Setting tab

By default, the access permission list of the portal is empty:



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

After selecting groups, the access permission list is displayed:



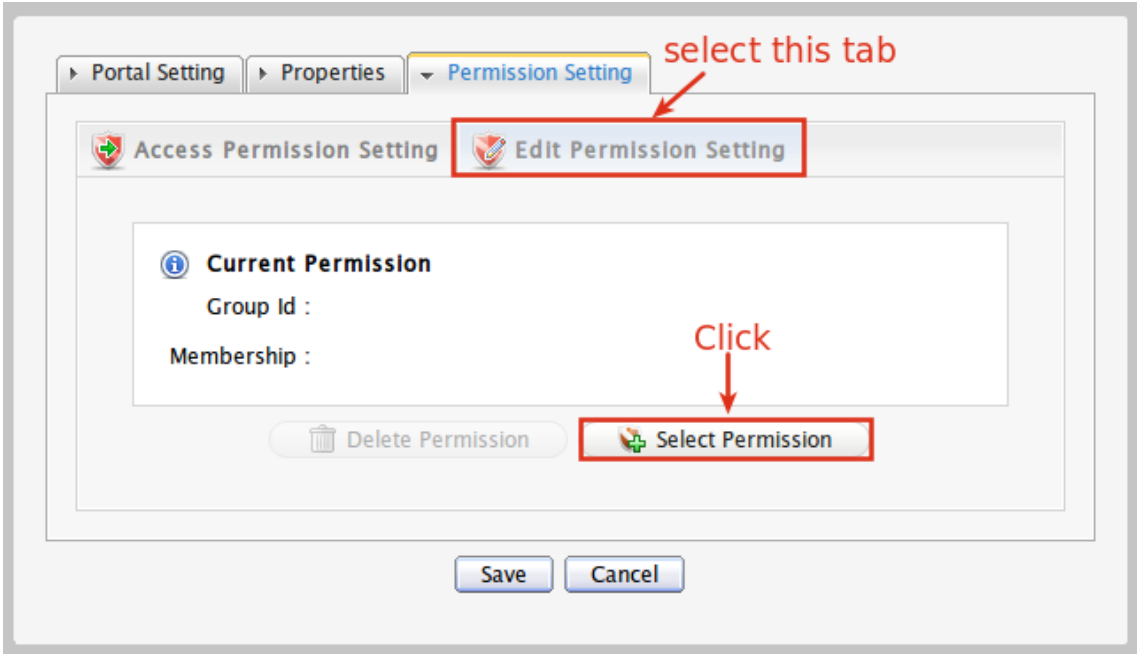
In which, the icon



is to remove its corresponding group from the Access Permission list.

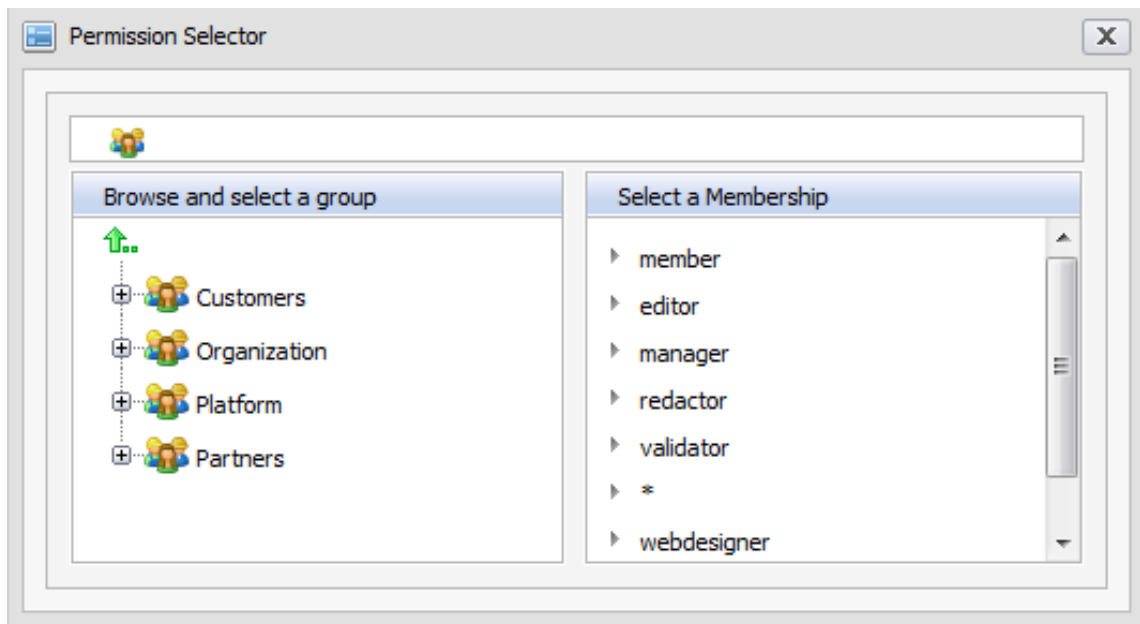
### Edit Permission Setting

By default, it is also empty and you have to assign the edit permission to a specific group.



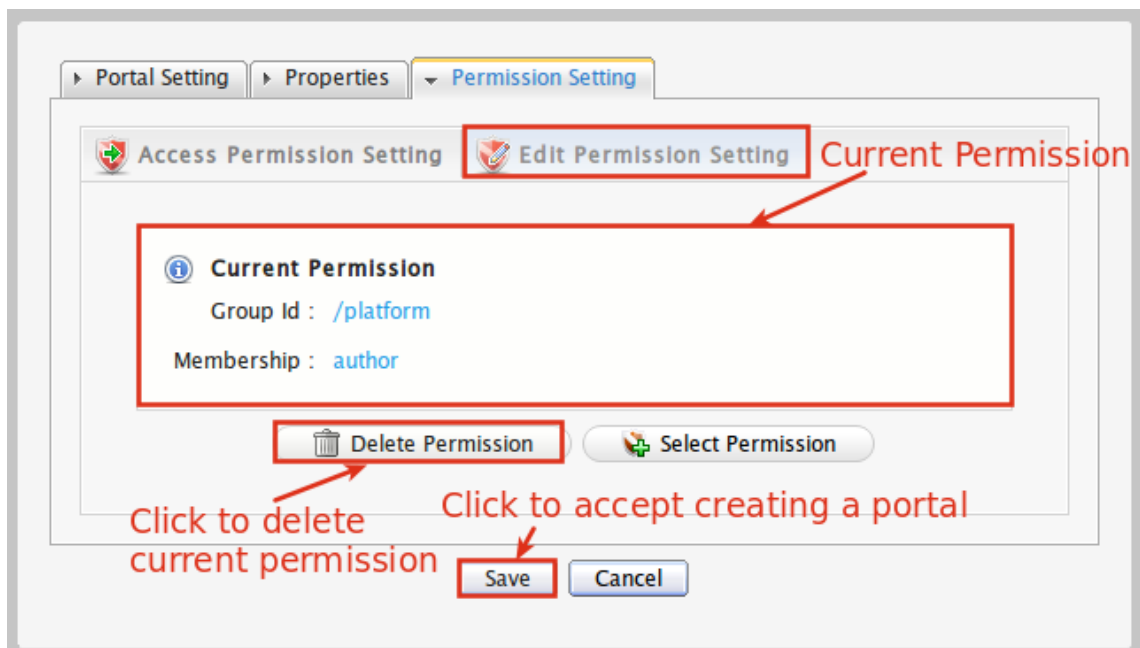
You can assign the edit permission to a group with a specific membership by clicking the **Select Permission** button in the **Edit Permission Setting** tab to open the Permission

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:

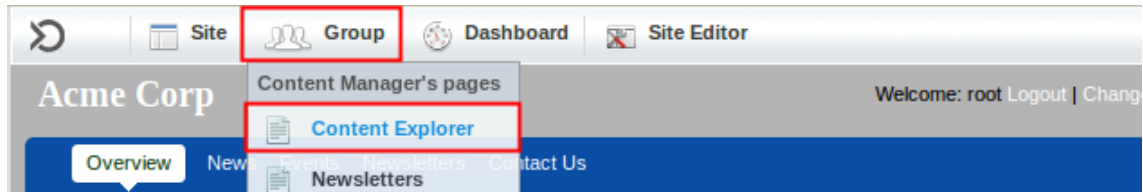


The edit permission is assigned for only one group at one time. You can click the Delete Permission button to remove the current edit permission of the selected group or re-assign the edit permission to the another group by re-clicking the Select Permission button and select another group.

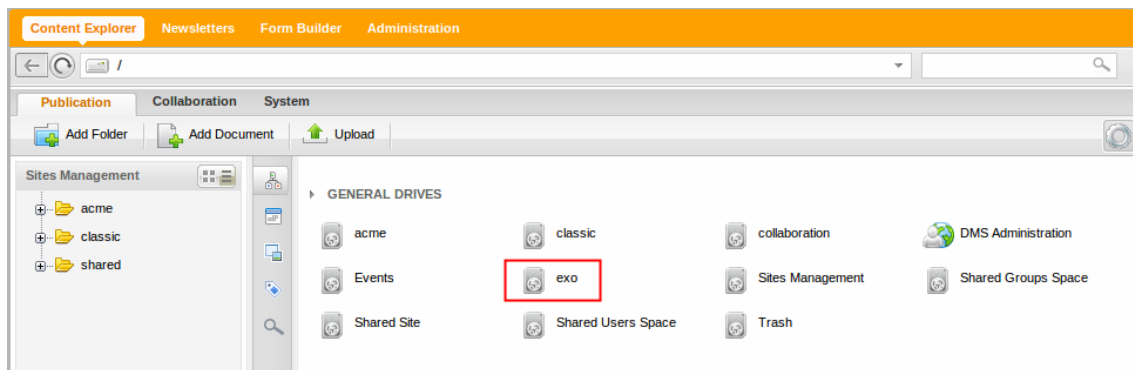
5. Click **Save** to accept creating a new portal.

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

To see it in the drive, click **Group > Content Explorer** on the administrator bar.



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



### 5.1.2. Edit a Site

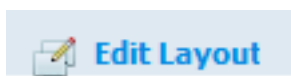
This function enables you to edit a site (portal). In addition to editing the configuration (setting, access/edit permission) of a site like a portal, you also may edit the layout components of that site.

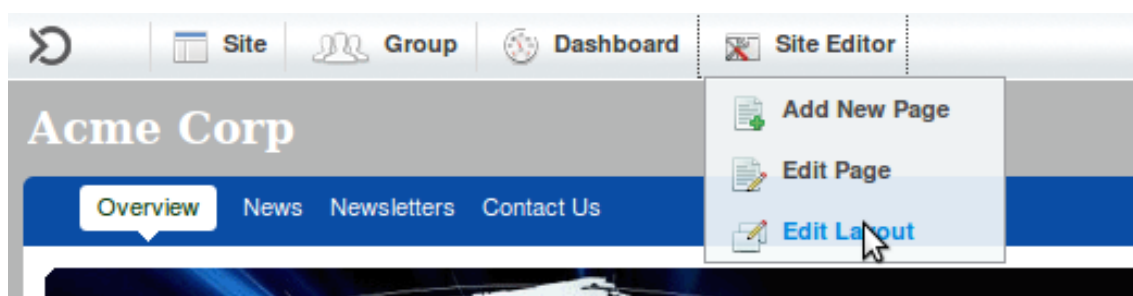
#### 5.1.2.1. How to edit the current Site

To edit the current site that you are browsing, do the following:

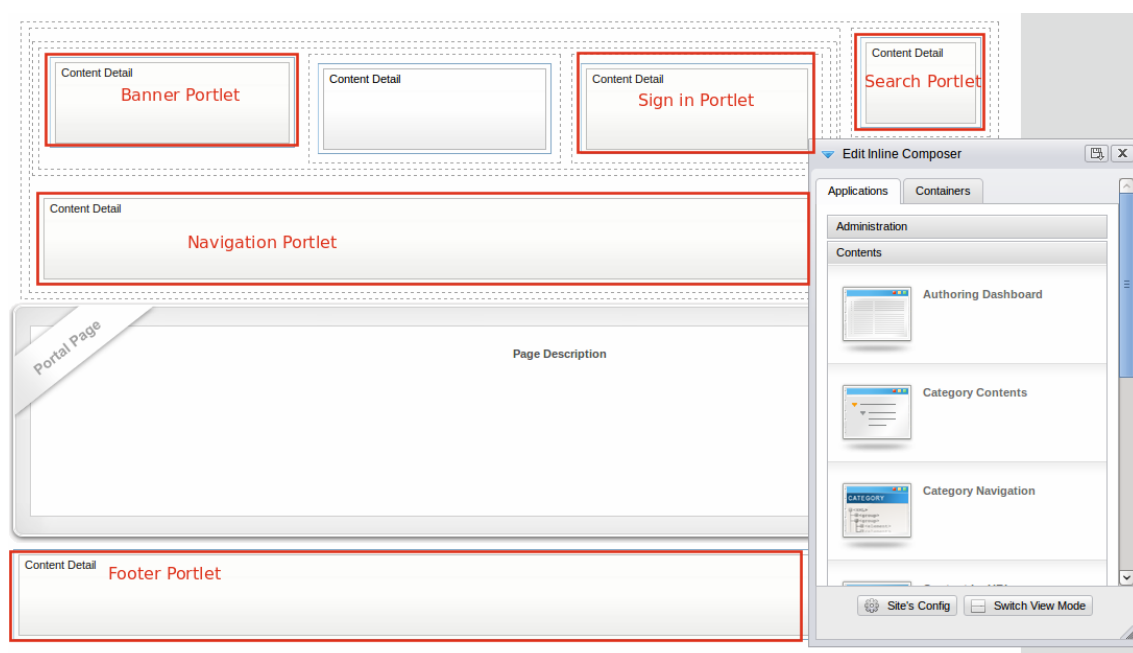
#### Procedure 5.1. Edit the layout of the Website:

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 site will appear.

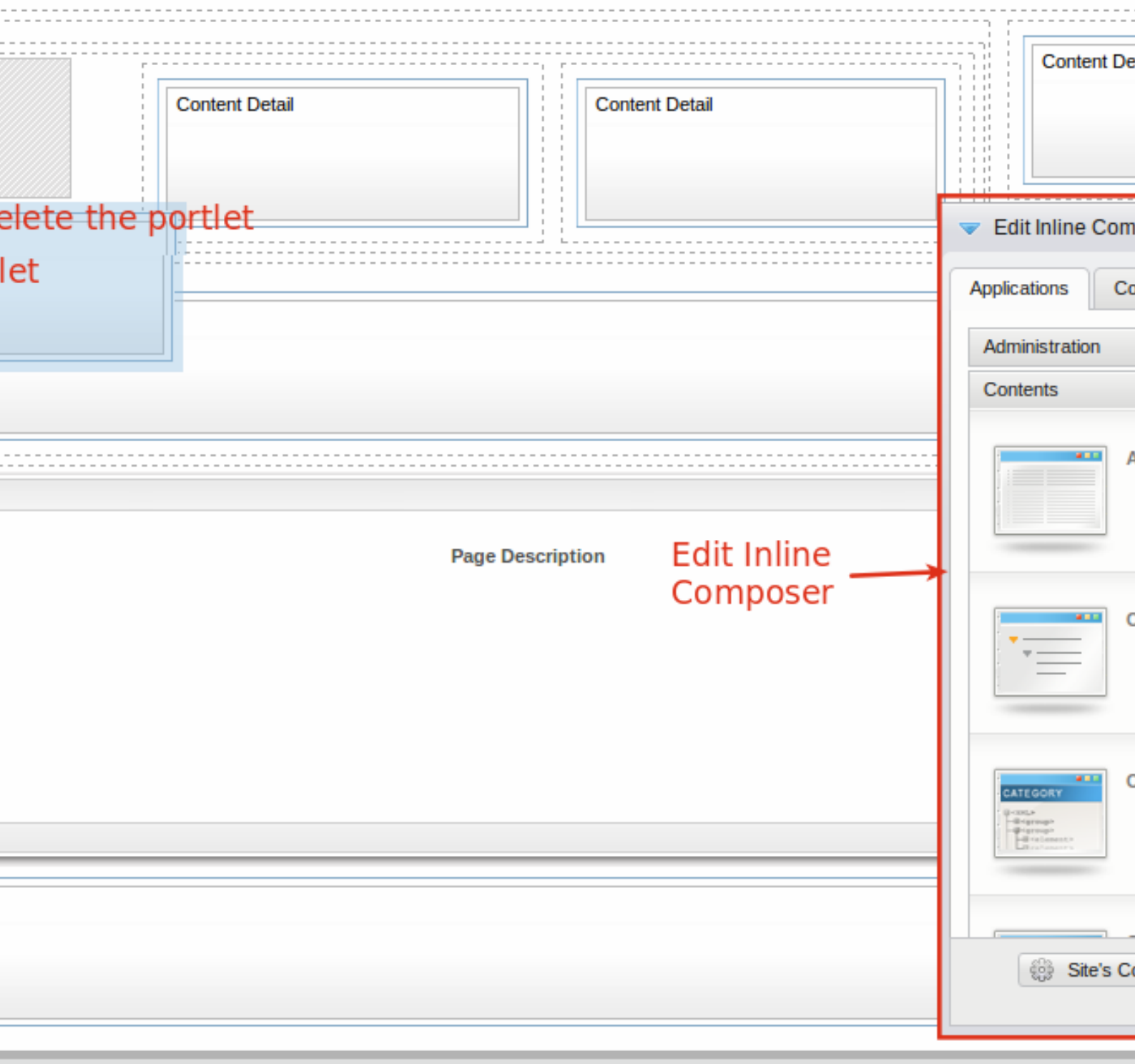


To edit the configuration and the layout of the current portal, use one of icons below:

**Table 5.2.**

Indicator	Meaning
 Site's Config	<b>Site's config:</b> allows editing the site's configuration.
 Switch View Mode	<b>Switch View Mode:</b> allows turning on the view mode
	<b>Finish:</b> allows saving all changes and escaping the Edit page
	<b>Abort:</b> allows canceling all changes that have not been saved and quitting the Edit page

**Edit layout:** You can edit a banner, a navigation bar, a breadcrumb bar, a homepage and a footer of a website. Also, you can add more portlets on the homepage or move a portlet from a location to another location

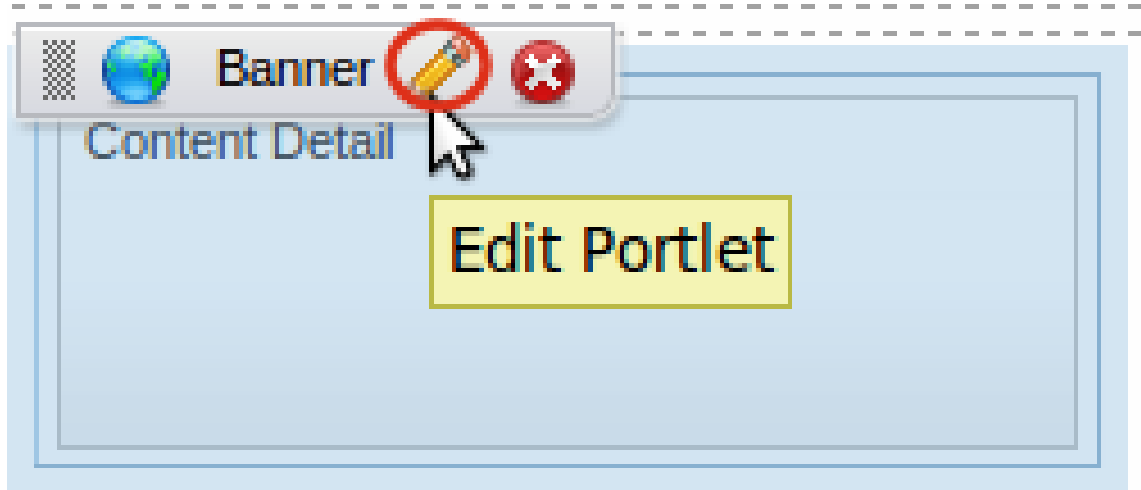


## Procedure 5.2. Edit Banner

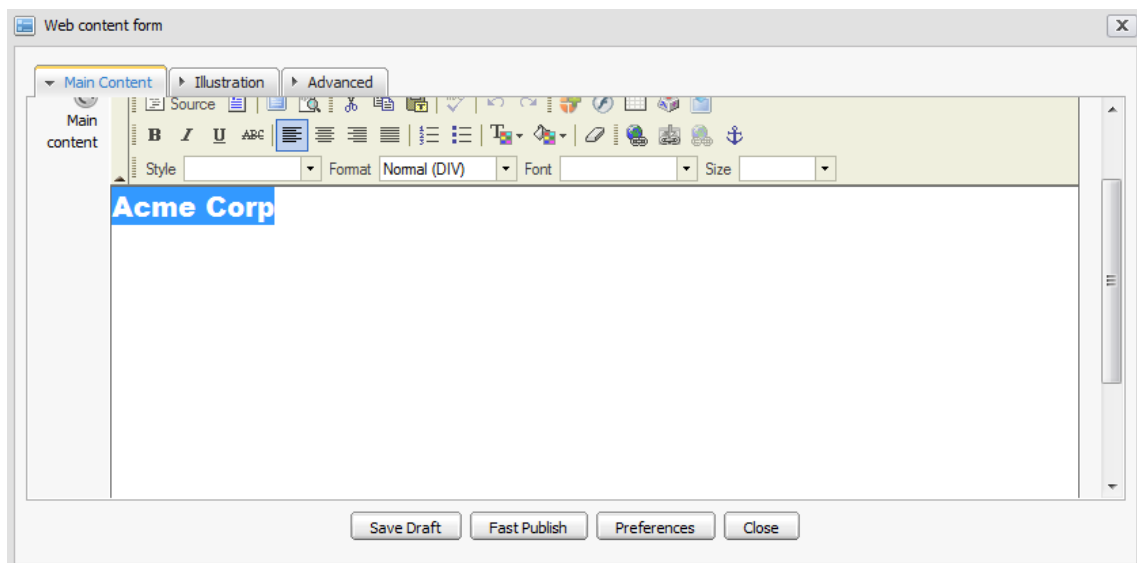
1. Show the form to edit a banner by clicking the icon



the banner portlet in the Edit Portal form like the illustration below.



A form to edit the current banner will appear:



2. Select **Edit Mode** tab:

**Content Selection:** Select the path of the content that you want to show by clicking +.

**Display Settings:**

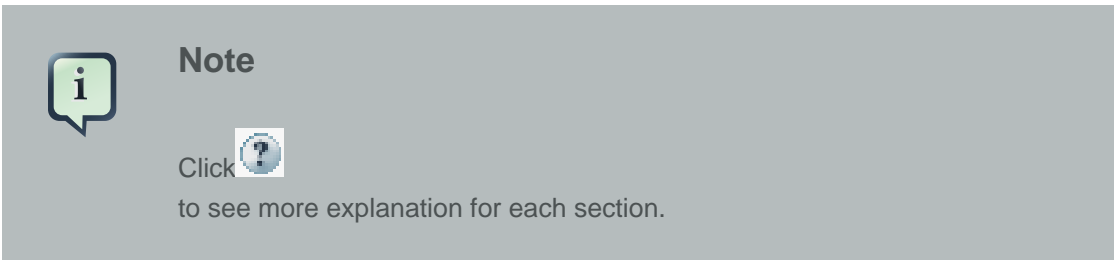
- **Show Title:** Specify whether the title of the content is displayed or not.
- **Show Date:** Specify whether the date of the content publication is displayed or not.

- **Show Option Bar:**Show or hide the Option bar used to show the print link.

**Print Setting:**

- **Show in page:** Choose a page for the print review.
- **with:** Parameters contains the content path.

**Advanced:** The content should enable “dynamic navigation” that interprets the URL and shows a content.



3. Select the **Portlet Setting** tab:

A screenshot of a web application's 'Portlet Setting' tab. The tab is highlighted with a yellow border. Below the tab are several settings: 'Display Name: Content Detail', 'Portlet Title: Banner', 'Width:', 'Height:', 'Show Info Bar: [checkbox]', 'Show Portlet Mode: [checkbox]', 'Show Window State: [checkbox]', and 'Description:'. A red box highlights the three checkboxes, and a red arrow points to them with the text 'Show options'. At the bottom are 'Save And Close' and 'Cancel' buttons.

Details:

**Table 5.3.**

Display name	The display name of the portlet. You cannot change it.
Portlet Title	The title of the portlet. You can change it.
Width	The with of the portlet.

Height	The height of the portlet.
Show infor bar	Tick the check box if you want to show the infor bar of the portlet.
Show Portlet mode	Tick the check box if you want to show the portlet mode.
Show window state	Tick the check box if you want to show the window state.
Description	Enter description about the portlet.

4. Select **Icon** tab: Select an icon for the portlet by clicking it.
5. Select **Decoration Theme** tab: Select a decoration theme for the portlet.
6. Select **Access Permission** tab:

By default, all users can access the portlet:

Portal Setting Properties **Permission Setting**

**Access Permission Setting** Edit Permission Setting

Make it public (everyone can access): ☐

Group Id	Membership Type	Action
Empty data		

**Add Permission**

Save Cancel

However, you can edit the access permission by unticking the checkbox > click **Add Permission**:


Make it public (everyone can access) ☐ Untick

Group Id	Membership Type	Action
Empty data		

Add Permission Click

Save And Close Cancel

The **ListPermissionSelector** form appears. Select a group on the left pane and a membership on the right pane.

**Note**

The \* on the right pane means all members in the group.

7. Click **Save and Close** to accept changing or **Cancel** to quit the form without changing.

8. Click




to quit the form to edit the current site.

**Edit the current Site's configuration:** To edit the configuration for the current site. Click



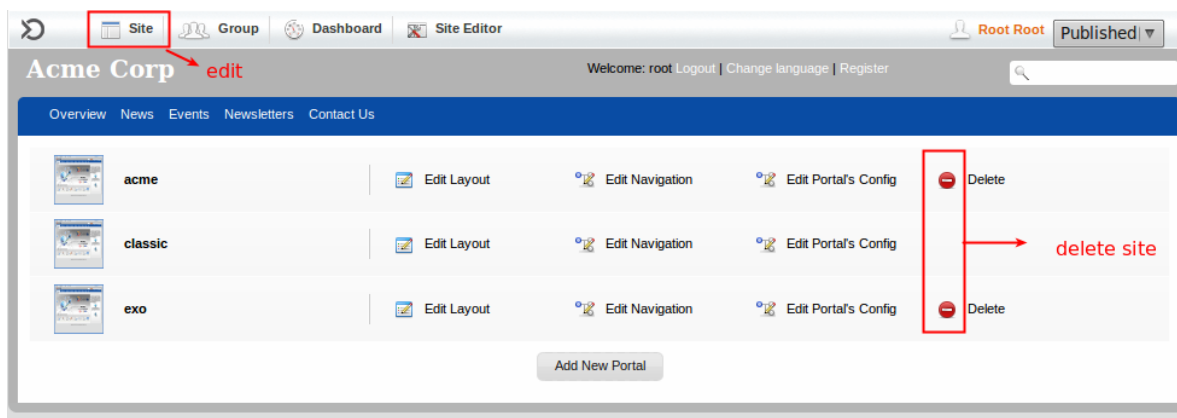
to open the same form as the form to add a new portal. Do the same steps in the part [Section 5.1.1](#), *"Create a new site"*.

**Note**

You cannot change the name of the site.

### 5.1.2.2. How to edit an existing site

You can edit any existing sites in the list of sites. Here, you can edit the layout, configuration and navigation bar of the site. Click **Site** to open the list of existing sites.

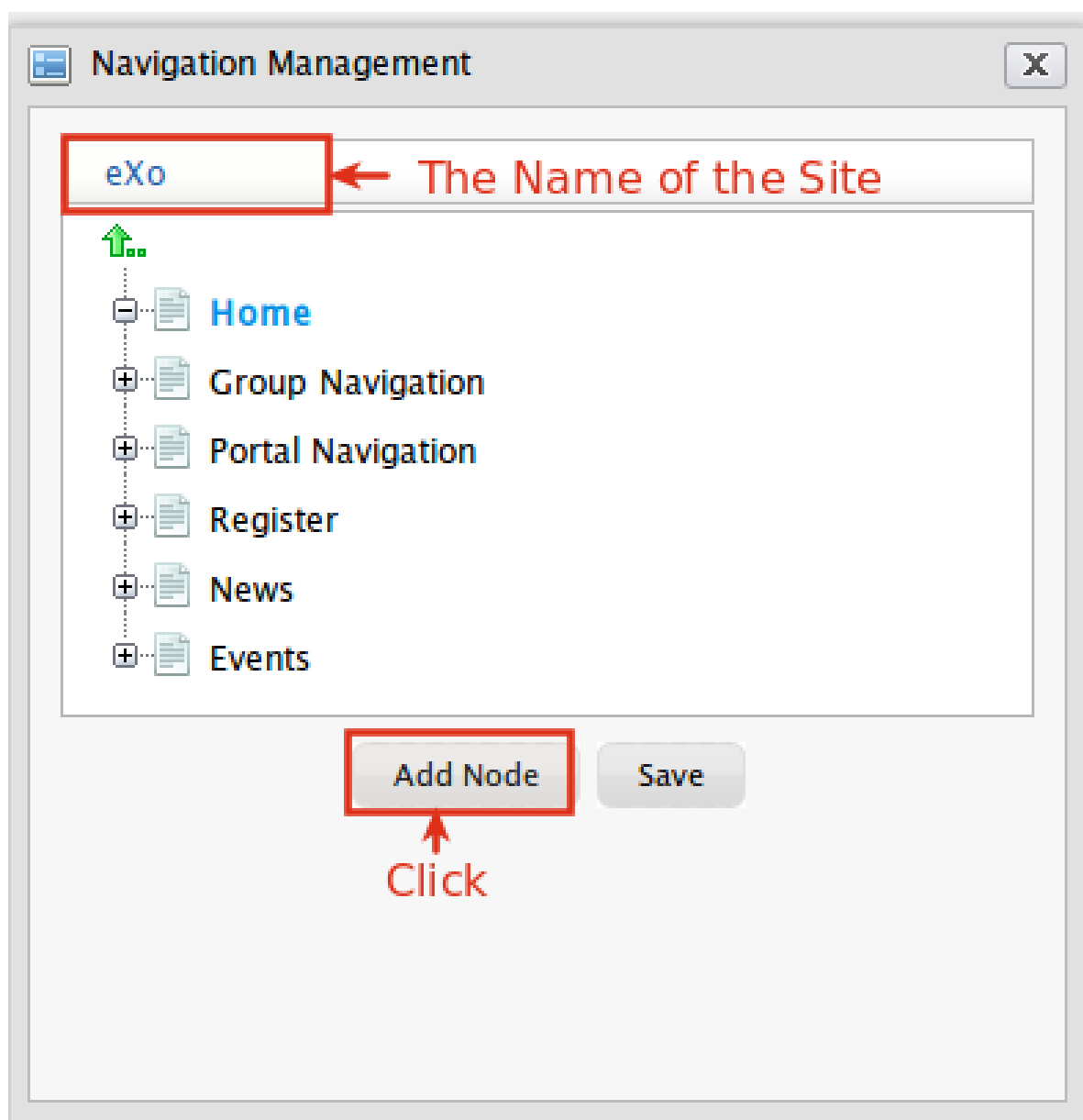


**Edit Layout.** Do the following to edit the layout of an existing site.

1. Click **Site > Edit Layout** to open a form to edit the site layout .
2. Do the same steps as the part [Edit layout](#) of the current site.

**Edit Navigation.** Do the following to edit the navigation of an existing site.

1. Click **Site > Edit Navigation** to open the **Navigation Management** form



2. Click **Add Node** to open the **ADD/EDIT PAGE NODE** form.
3. In the **Page Node Setting** tab, enter a name for the node. It is required.

ADD/EDIT PAGE NODE

Page Node Setting | Page Selector | Icon

Uri:

Node Name:  \*

Label:

Visible: ☒

Publication date & time: ☐

Save Back

Details:

**Table 5.4.**

Uri:	The node's identification. The Uri is automatically created once a new node has been created.
Label:	The node's display name on the screen. This field may be changed and its length must be between 3 and 60 characters.
Visible:	This checkbox allows the page and its node to be shown or hidden at the navigation bar, the page navigation bar and the sitemap. See above for more details.
Publication date & time:	This option allows this node to be published for a period of time. Two fields, including 'Start Publication Date' and 'End Publication Date' only display when this option is checked.
Start Publication Date:	The start date and time to publish the node.
End Publication Date:	The end date and time to publish the node.

4. Select the **Page Selector** tab:

The screenshot shows a window titled "ADD/EDIT PAGE NODE". It has three tabs: "Page Node Setting", "Page Selector" (which is selected and highlighted with a red box), and "Icon". Inside the "Page Selector" tab, there is a section titled "Selected Page Info" with an information icon. This section contains three input fields: "Page Id:", "Name:", and "Title:". Red arrows point to the "Name:" and "Title:" fields with the labels "Enter the page name" and "Enter the title of the page" respectively. Below these fields are three buttons: "Clear Page" (with a trash icon), "Create Page" (with a plus icon), and "Search and Select Page" (with a checkmark icon). Red arrows point to the "Create Page" and "Search and Select Page" buttons with the labels "Create a new page" and "Select an existing page" respectively. At the bottom of the window are "Save" and "Back" buttons.

Details:

**Table 5.5.**

Page Id:	The identification string of the page. It is created automatically when the page is created.
Name:	The selected page's name.
Title:	The selected page's title.
Clear Page:	To remove the inputted page information in the fields
Create Page:	This is to create a new page with the inputted name and the title.
Search and Select Page:	This is to search and select an existing page.

- Enter a title for the page.
  - Click **Create Page** to create a new page or **Search and Select Page** to select an existing page for the node.
5. Select the **Icon** tab to choose an icon for the node. It is not required.
  6. Click **Save** to accept creating a node for the navigation.



### Note

You can edit/delete a node, edit a node's page, copy/cut a node and more by right-clicking the node in the form Navigation Management form.

**Edit Properties.** Portal properties such as language, skin and permissions can be edit by doing the following:

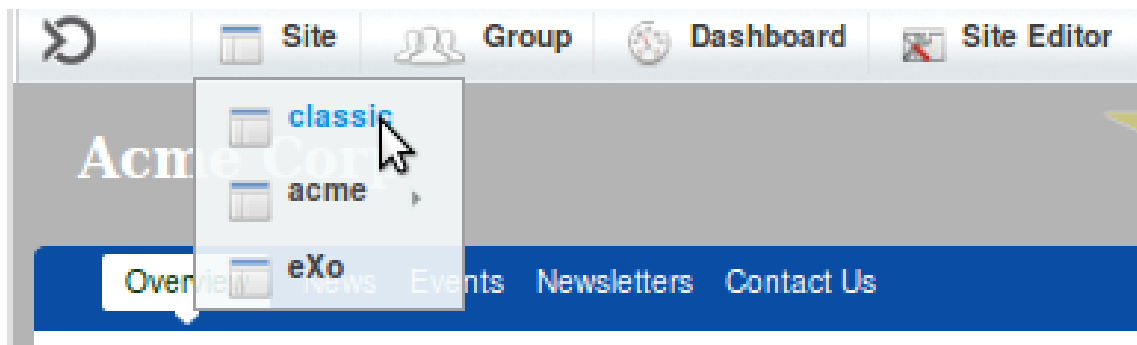
1. Click **Site > Edit Portal's Config** to open the same form as the form to create a site.
2. Do the same steps in the part [Section 5.1.1, "Create a new site"](#).

### 5.1.3. Switch between sites

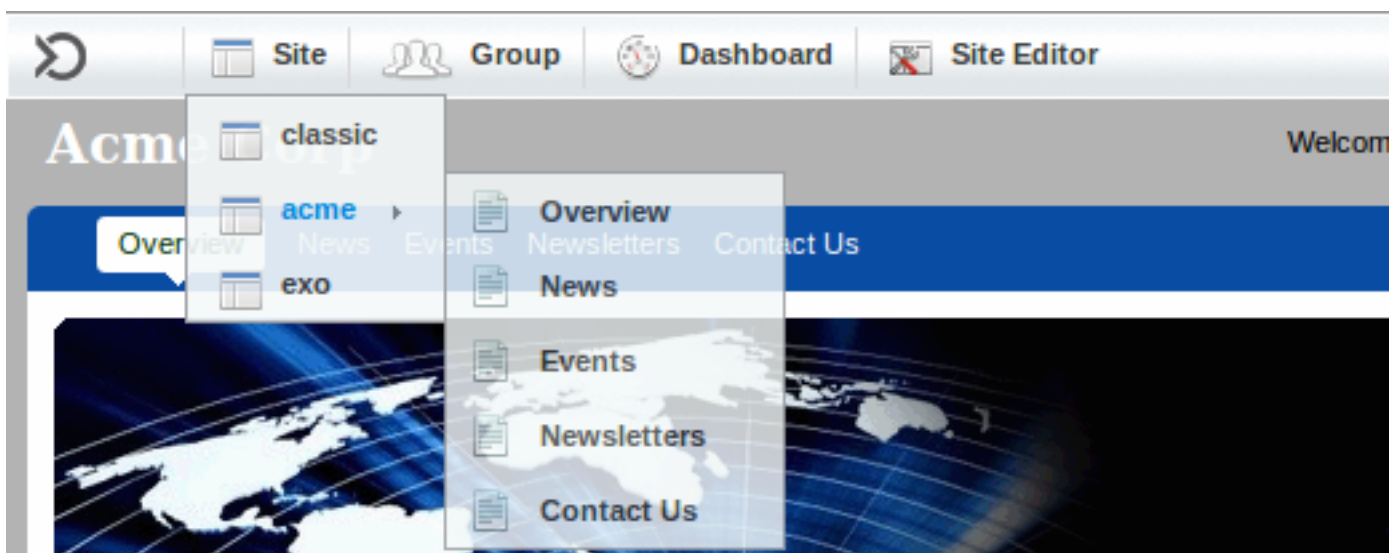
This function is used to change the current web site by another one.

#### Procedure 5.3.

- 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, and you will see all the child pages that displays on the Navigation bar of the selected site.



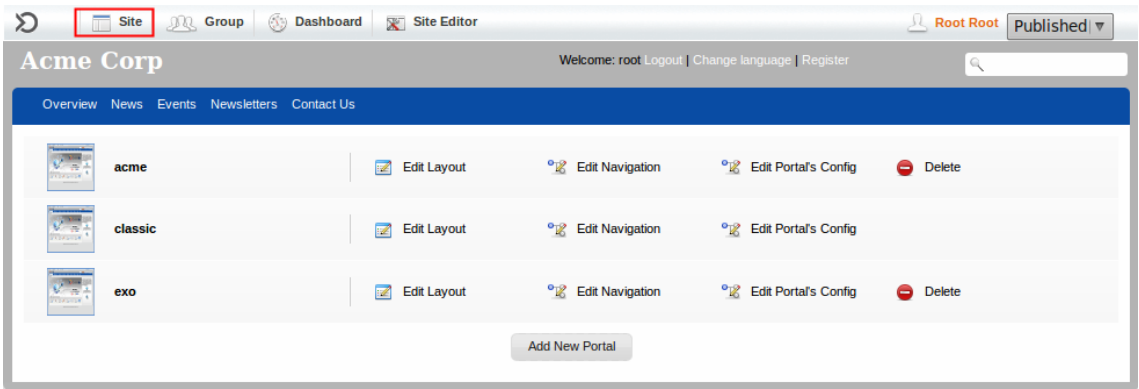
### 5.1.4. Delete a site

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

Do the following:

Procedure 5.4.

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



- 2. Click



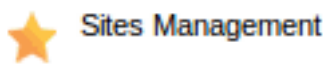
in the row of the portal that you want to delete.

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

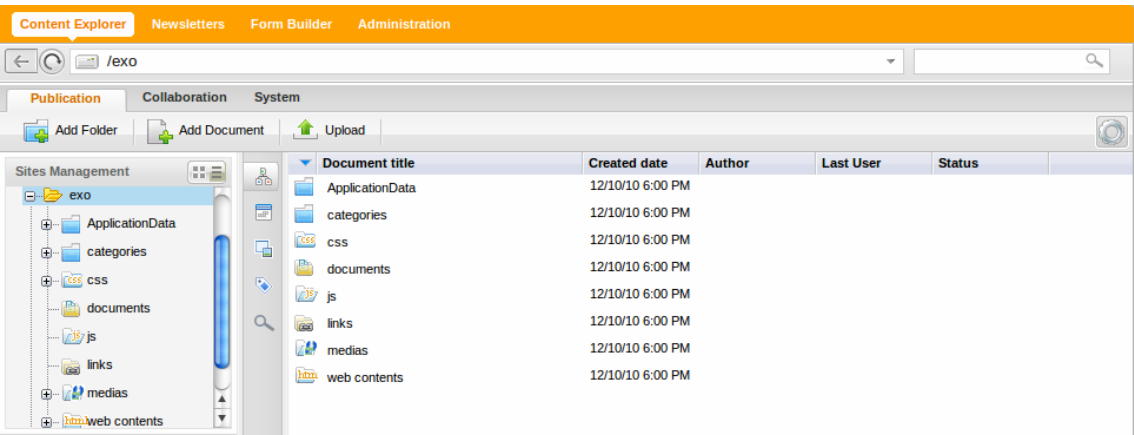
5.2. Manage Site Resources in one place

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

Chose



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.

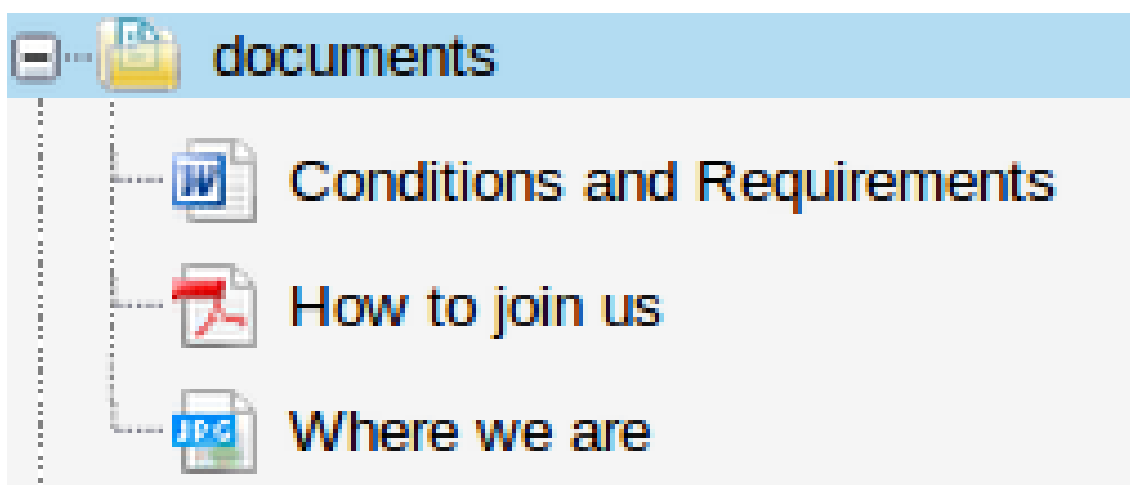


#### CSS

Once a new CSS file in a site is created, it will affect on how the site will look. For 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

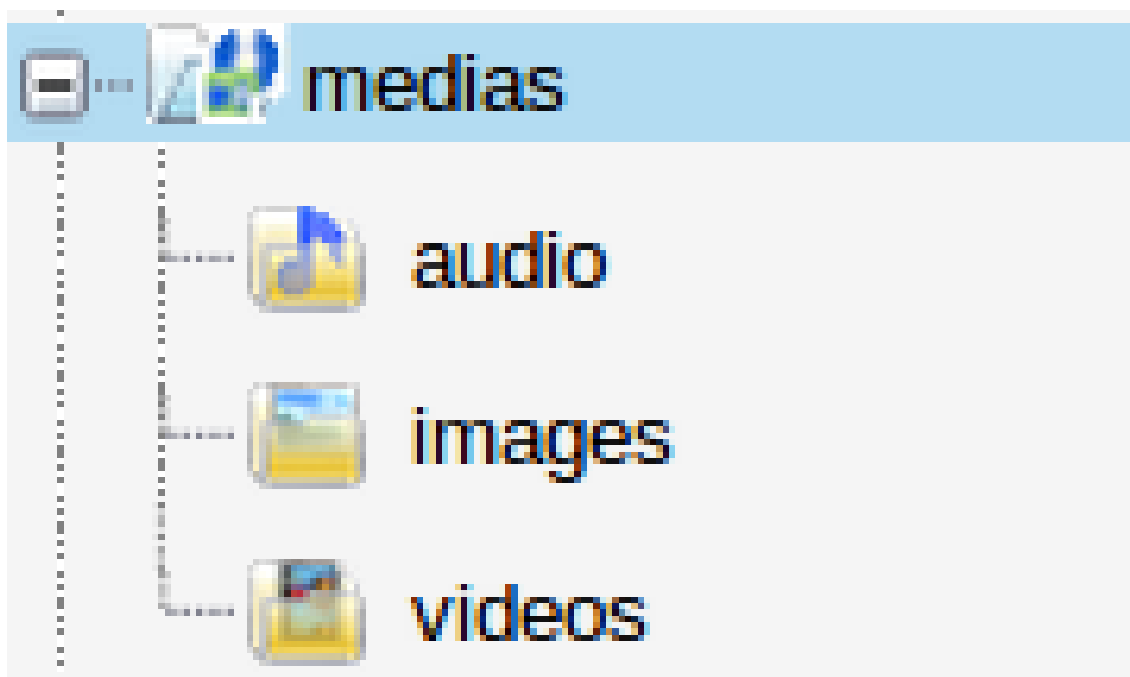
This is one of default files of a site. This file contains Java Script data that is used to make a site more animated and more dynamic.

### 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:

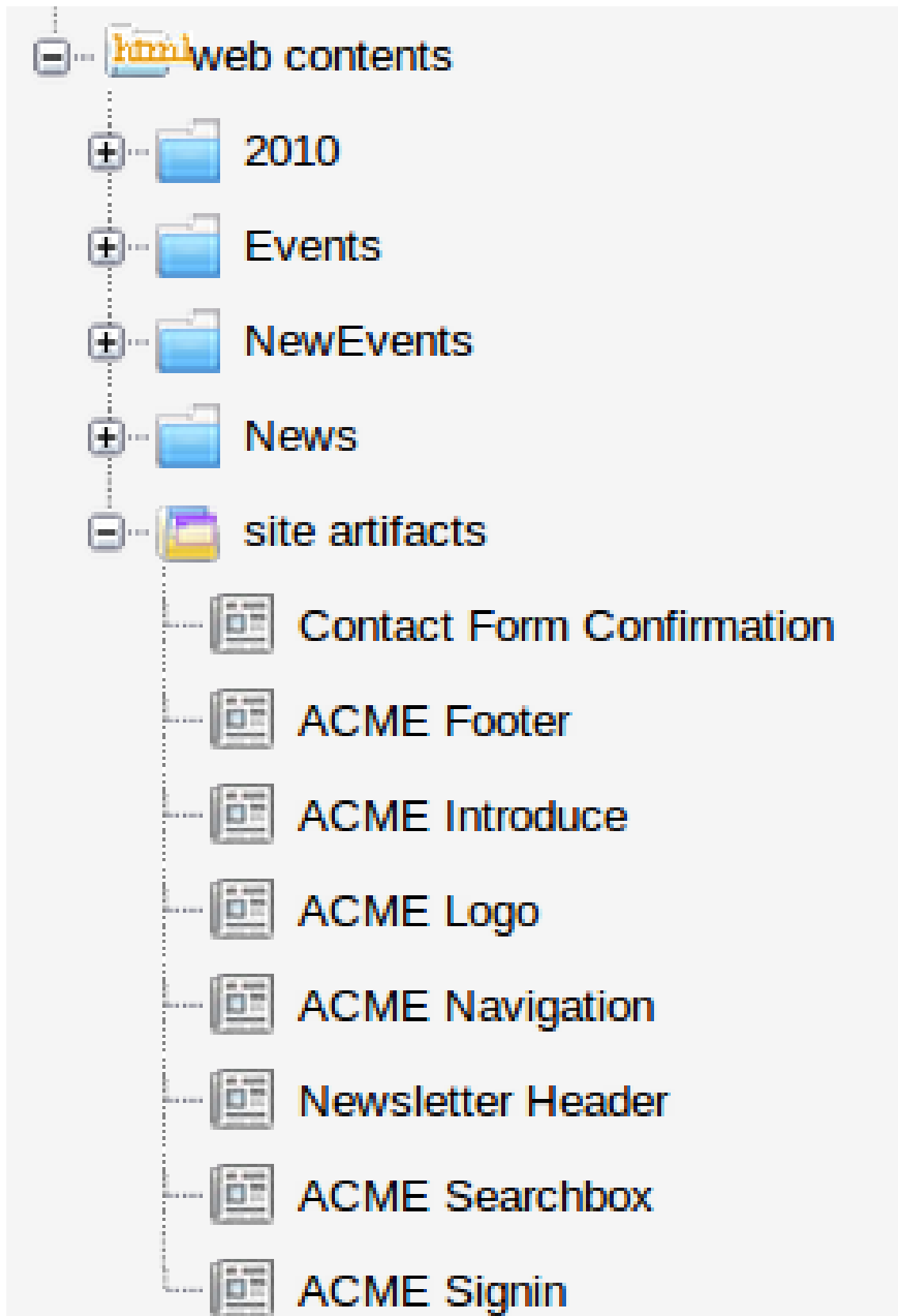
This folder contains images used in a site.

videos:

This folder contains videos used in a site.

### 5.2.6. Web Content Folders

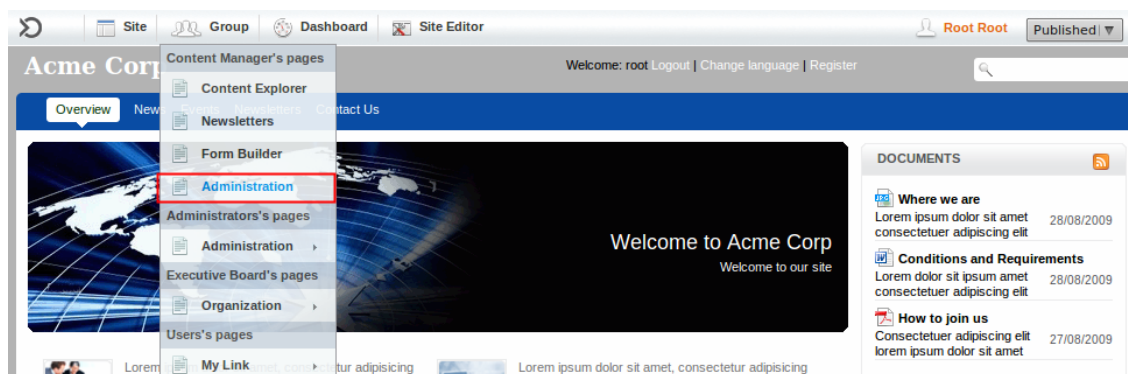
This folder contains all web content used in sites. You are suggested to put all web content files here to make use (in case you need to reuse web content files for creating a new site) and manage more flexibility.



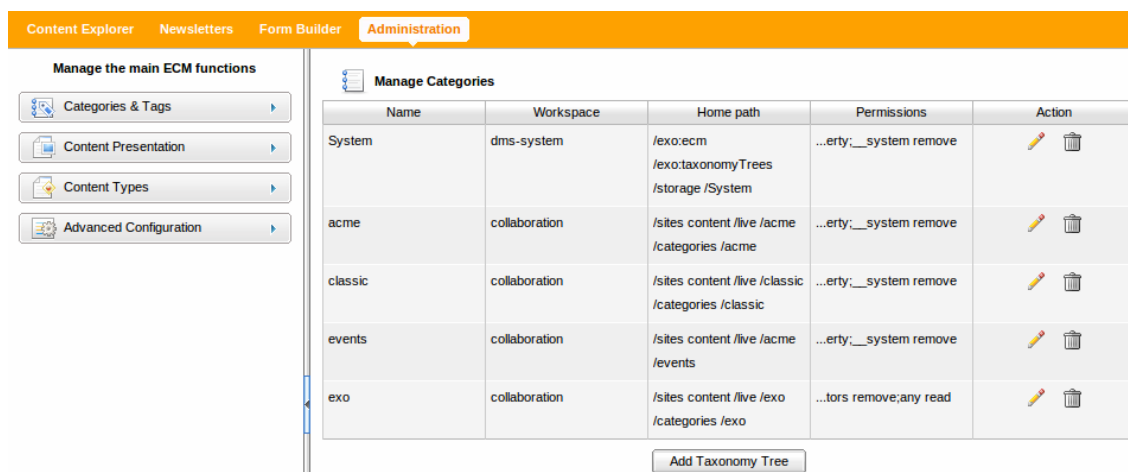
## 5.3. Administration page

This page is used to manage all workspaces, drives, node types, metadata, templates, queries, etc. Only administrators can access the **Administration** page.

- Click **Group > Administration** on the administration bar:



The **Administration** page will appear:



This page enables you to access:

- Categories and Tags:** includes Manage Categories and Manage Tags.
- Content Presentation:** includes Manage Template, Manage Metadata, Manage Views, Manage Drive.
- Content Types:** includes Namespace Registry, Manage Node Type.
- Advanced Configuration:** includes Manage Queries, Manage Scripts, Create an Action Type.

### 5.3.1. Categories and Tags

#### 5.3.1.1. Manage Tags

Manage Tags enables you to manage tag styles. The tag style will be changed depending on the number of documents in a tag.

Go to **Administration > Manage Categories > Manage Tags.**

Style name	Document range	Style of tag	Action
normal	0..2	font-size: 12px; font-weight: bold; color: #6b6b6b; font-family: verdana; text-decoration: none;	
interesting	2..5	font-size: 13px; font-weight: bold; color: #5a66ce; font-family: verdana; text-decoration: none;	
attractive	5..7	font-size: 15px; font-weight: bold; color: blue; font-family: Arial; text-decoration: none;	
hot	7..10	font-size: 18px; font-weight: bold; color: #ff9000; font-family: Arial; text-decoration: none;	
hottest	10..*	font-size: 20px; font-weight: bold; color: red; font-family: Arial; text-decoration: none;	

[Add style](#)

### 5.3.1.1.1. Edit

**Tag manager** tab enables you to edit the existing tags.

Do as follows:

### Procedure 5.5. Editing existing tabs

1. Click the pen icon corresponding 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:

Manage the main ECM functions

- Categories & Tags
  - Manage Categories
  - Manage Tags**
- Content Presentation
- Content Types
- Advanced Configuration

**Manage Tags**

Tag manager Tag permission manager

Style name	Document range	Style of tag	Action
normal	0..2	font-size: 12px; font-weight: bold; color: #6b6b6b; font-family: verdana; text-decoration: none;	
interesting	2..5	font-size: 13px; font-weight: bold; color: #5a66ce; font-family: verdana; text-decoration: none;	
attractive	5..7	font-size: 15px; font-weight: bold; color: blue; font-family: Arial; text-decoration: none;	
hot	7..10	font-size: 18px; font-weight: bold; color: #ff9000; font-family: Arial; text-decoration: none;	
hottest	10..*	font-size: 20px; font-weight: bold; color: red; font-family: Arial; text-decoration: none;	

**Add style** click to add tag style

edit and delete tag

Details:

**Style name**

Give the tag name. You cannot edit it.

**Document Range**

Give the number of document assigned to a tag. (\*Required).

**Html style**

Include font-size, font-weight, colour, font-family, text-decoration. (\*Required).

- Change values in the fields: **Style name**, **Document range**. **Html single**
- Click **Update** to save new changes, or **Cancel** to quit this form without changing.

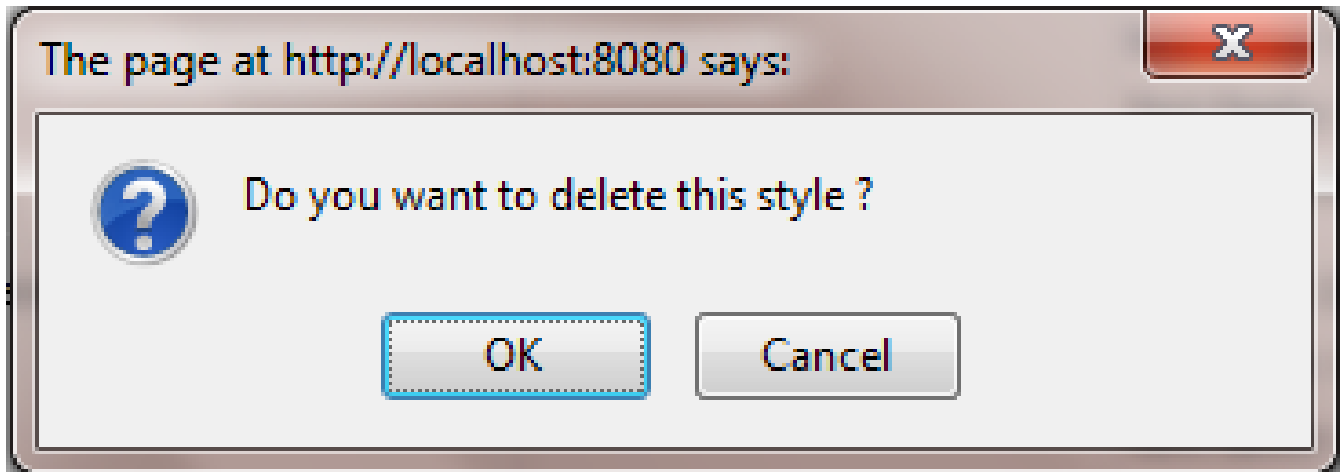


### Note

- 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. For example, 0..2 (means 0-2 documents assigned to a tag), 10..\* (means at least 10 documents assigned to a tag).
- 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 he 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 5.6. Add a Tag Style

1. Click the **Add style** button. The **Add tag style configuration** form will appear:

A screenshot of a web form titled 'Edit tag style configuration'. The form has three input fields: 'Style name', 'Document range', and 'Html style'. Each field has an asterisk (\*) to its right, indicating it is required. The 'Html style' field is a larger text area. At the bottom of the form, there are two buttons: 'Update' and 'Cancel'.

2. Input values in the fields: **Style name**, **Document range**, **Html style**, all of which are required.
3. Click **Update** to accept adding a new tag style, or **Cancel** to quit without adding a new tag style.

### 5.3.1.1.4. Tag Permission Manager

The **Tag permission manager** tab helps a administrator set permissions regarding editing and deleting public tags.

The screenshot shows the 'Tag permission manager' tab. It contains a table with two columns: 'Memberships' and 'Action'. The first row shows a membership '\*:/platform/administrators' with a trash icon in the action column. Below the table is a section titled 'Add a permission' with a text input field labeled 'Memberships:', a dropdown menu, and a 'Save' button.

Memberships	Action
*:/platform/administrators	

**Add a permission**

Memberships:  \*

### Procedure 5.7. Set Permission To Tag Management

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

The screenshot shows the 'Select membership' dialog box. It has a title bar with a close button. Inside, there's a section for 'customers' with a tree view on the left and a list on the right. The tree view shows a hierarchy: 'customers' (selected), 'organization', 'platform', and 'partners'. The list on the right shows various roles: 'member', 'author', 'editor', 'manager', 'redactor', 'validator', and '\*'. A scrollbar is visible on the right side of the list.

**Select membership**

**customers**

**Select group**

- customers
- organization
- platform
- partners

**Select membership**

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

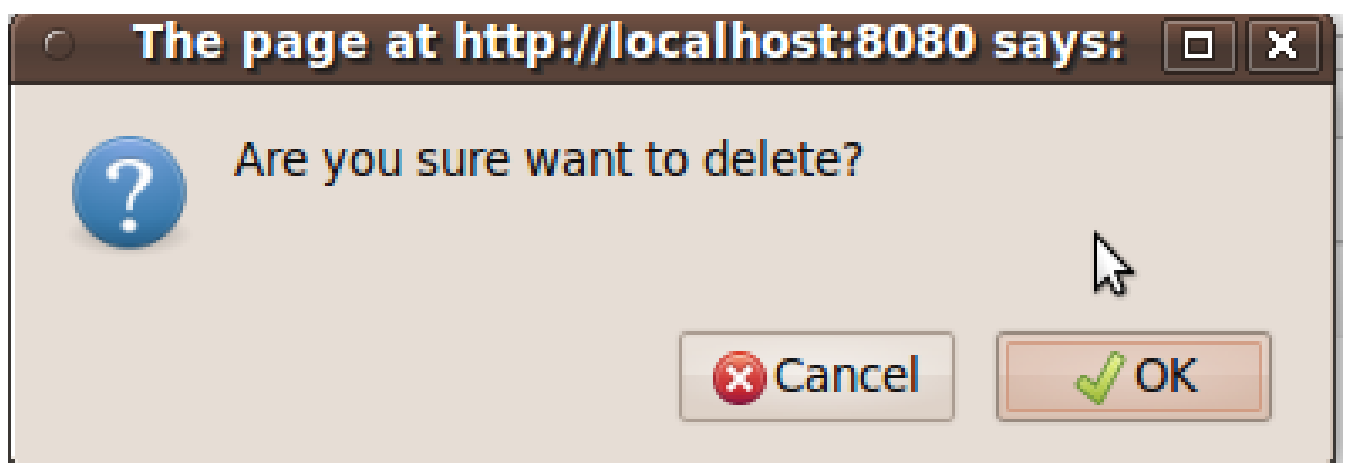
2. Select a group on the left and the corresponding membership on the right. The selected membership will appear in the **Memberships** field:

The screenshot shows the 'Tag permission manager' interface. It has two tabs: 'Tag manager' and 'Tag permission manager'. Below the tabs is a table with two columns: 'Memberships' and 'Action'. The 'Memberships' column contains the text '\*/platform/administrators'. The 'Action' column contains a trash icon. Below the table is a section titled 'Add a permission'. Inside this section, there is a label 'Memberships:' followed by a text input field containing 'manager:/customers'. To the right of the input field is an asterisk and a user icon. Below the input field is a 'Save' button.

- 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.

The screenshot shows the 'Tag permission manager' interface after saving. The 'Memberships' column now contains two entries: '\*/platform/administrators' and 'manager:/customers'. The 'Action' column contains a trash icon for each entry. The 'Add a permission' section is still visible, with the 'Memberships' input field containing 'manager:/customers' and a 'Save' button.

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:



- Click **OK** to accept the deletion, or **Cancel** to quit the form without deleting.

### 5.3.1.2. Manage Taxonomy

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 **Administration > Categories and Tags > Manage Categories**.

The screenshot shows the 'Manage Categories' interface. On the left, a sidebar lists 'Categories & Tags' with 'Manage Categories' selected. The main area displays a table of categories:

Name	Workspace	Home path	Permissions	Action
System	dms-system	/exo:ecm /exo:taxonomyTrees /storage /System	...erty:__system remove	[edit] [delete]
acme	collaboration	/sites content /live /acme /categories /acme	...erty:__system remove	[edit] [delete]
classic	collaboration	/sites content /live /classic /categories /classic	...erty:__system remove	[edit] [delete]
events	collaboration	/sites content /live /acme /events	...erty:__system remove	[edit] [delete]
exo	collaboration	/sites content /live /exo /categories /exo	...tors remove;any read	[edit] [delete]

At the bottom, there is an 'Add Taxonomy Tree' button. A red box highlights this button, with an arrow pointing to it from the text 'click to add category'. Another red box highlights the edit and delete icons in the 'Action' column, with an arrow pointing to it from the text 'edit and delete categories'.

### 5.3.1.3. Add a Taxonomy Tree

Perform the step in [Adding a Taxonomy Tree](#) to add a taxonomy tree.

#### Procedure 5.8. Adding a Taxonomy Tree

1. Click the **Add Taxonomy Tree** button to add a new taxonomy. The **Add taxonomy tree** form will appear.

Input taxonomy name, choose workspace and taxonomy home path

Name

Workspace

Home path

Reset Next Close

Enter Taxonomy Tree Name

Select Workspace

Select Home path

Move to next step

2. Enter the taxonomy tree name in the **Name** field. (\*Required).
3. Select the workspace you want to work with.
4. Select the home path by clicking the plus item. The **Select Home Path** form will appear:

exo:ecm

Workspace

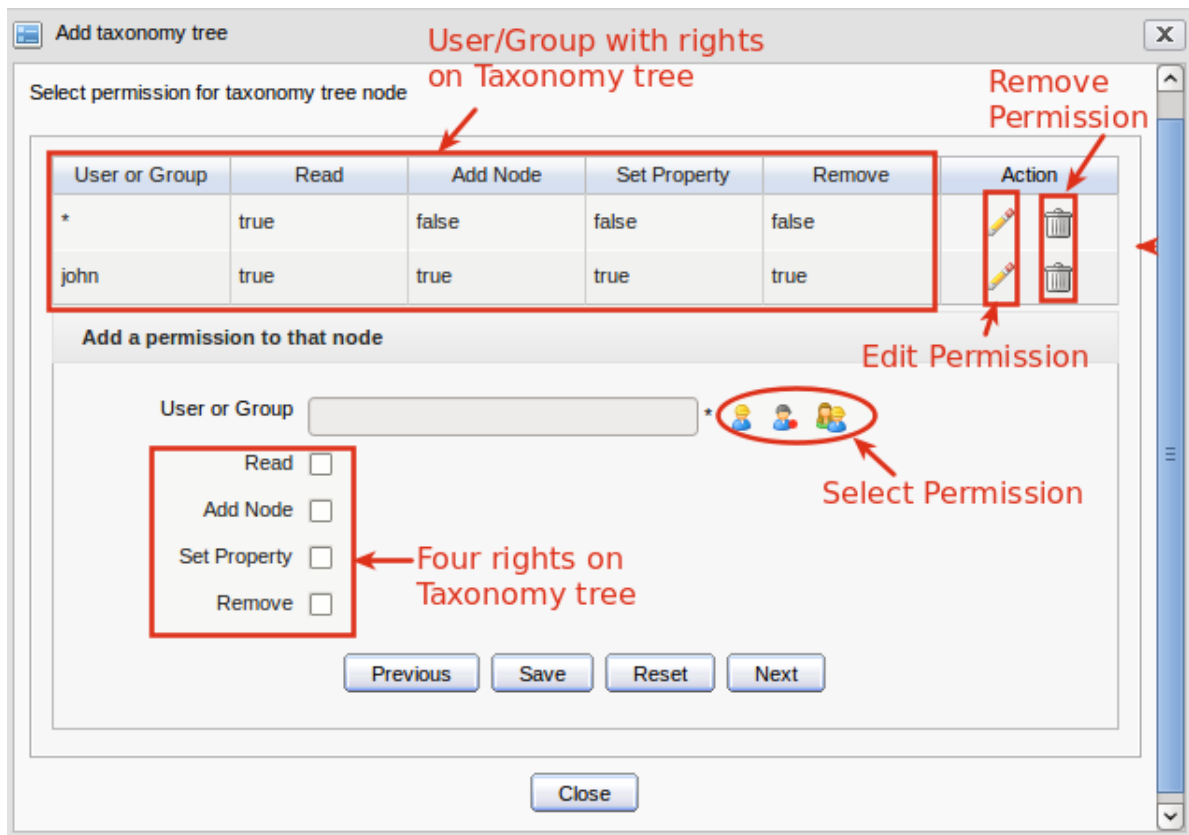
Root path ☒

Name	Action
exo:taxonomyTrees	<input checked="" type="checkbox"/>
exo:taxonomies	<input checked="" type="checkbox"/>
exo:folksonomies	<input checked="" type="checkbox"/>
exo:drives	<input checked="" type="checkbox"/>
templates	<input checked="" type="checkbox"/>

5. 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. 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. Click the



icon to select a user or the



icon to select memberships or the



icon to select everyone in order to set permissions. The user or membership that you have just selected will be displayed in the **User or Group** field.

Then, check at least one of these below options to set rights for the selected user 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. 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. Enter the name for an action of the taxonomy tree in the Name field. (\*Required).
10. Select values for **Lifecycle**, **NodeTypes**, **Target workspace**, **Target path**, **Affected Node Types**. (\*Required).
11. 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

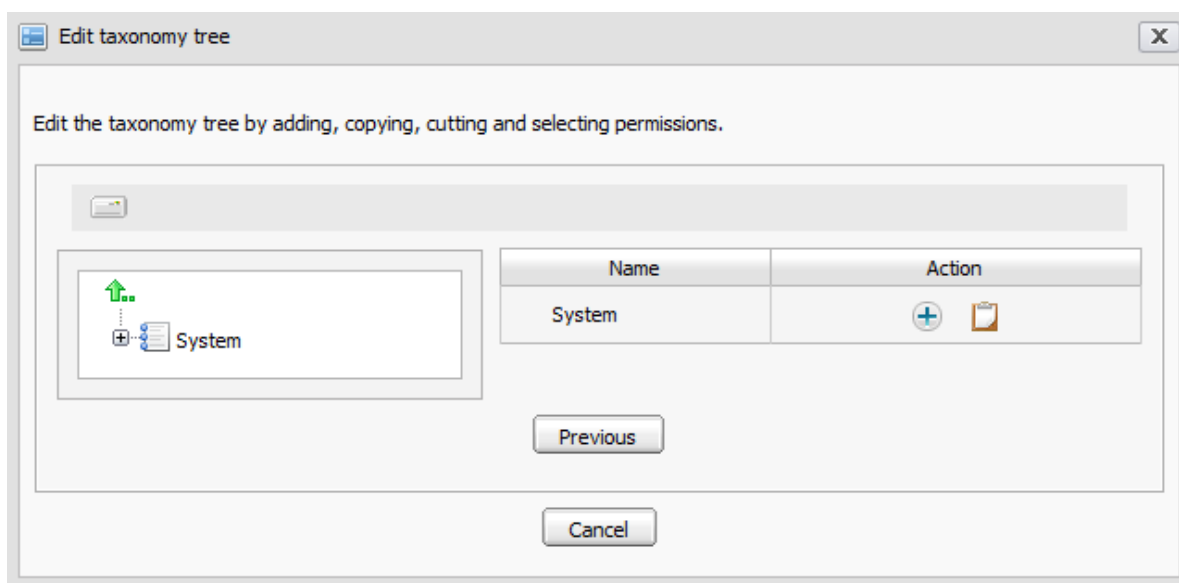
Perform the following steps to edit a taxonomy tree.

#### Procedure 5.9. Edit a Taxonomy Tree

1. Click the edit icon



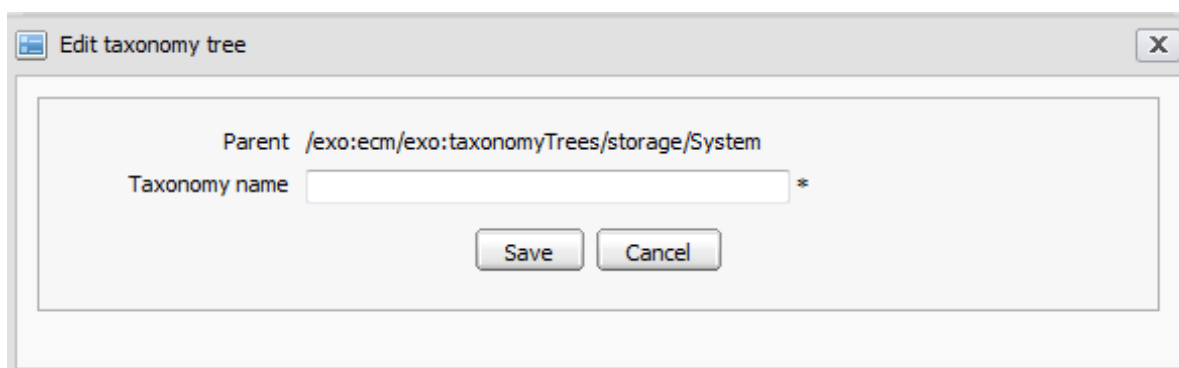
corresponds to the taxonomy tree you want to edit.



2. Click the icon



to add more taxonomy trees. The Edit taxonomy tree will appear:



3. Enter a taxonomy name in the Taxonomy name field. (\*Required).
4. Click **Save** to save the taxonomy name.
5. Click **Previous** to return to the previous steps.

6. Click **Save** to save all changes and the **Previous** or **Next** if you want to edit more.



### 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

When creating a node in eXo Content, you must set its properties. Thus, each node needs to have a form to enter data for their properties (called the dialog template), and display 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.

Template Name	Action
exo:addMetadataAction	[edit] [delete]
exo:article	[edit] [delete]
exo:autoVersioning	[edit] [delete]
exo:businessProcessModel	[edit] [delete]
exo:comments	[edit] [delete]
exo:contact_us	[edit] [delete]
exo:createRSSFeedAction	[edit] [delete]
exo:cssFile	[edit] [delete]
exo:enableVersioning	[edit] [delete]
exo:event	[edit] [delete]

Total pages: 3

**Figure 5.1. Manage Templates Form**

### Procedure 5.10. Add a New Template

1. Go to the Manage Templates form

Click **Administration** → **Content Presentation** → **Manage Templates**

### 2. Open a new template form

Click the **Add** button in the Manage Templates form to open the 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

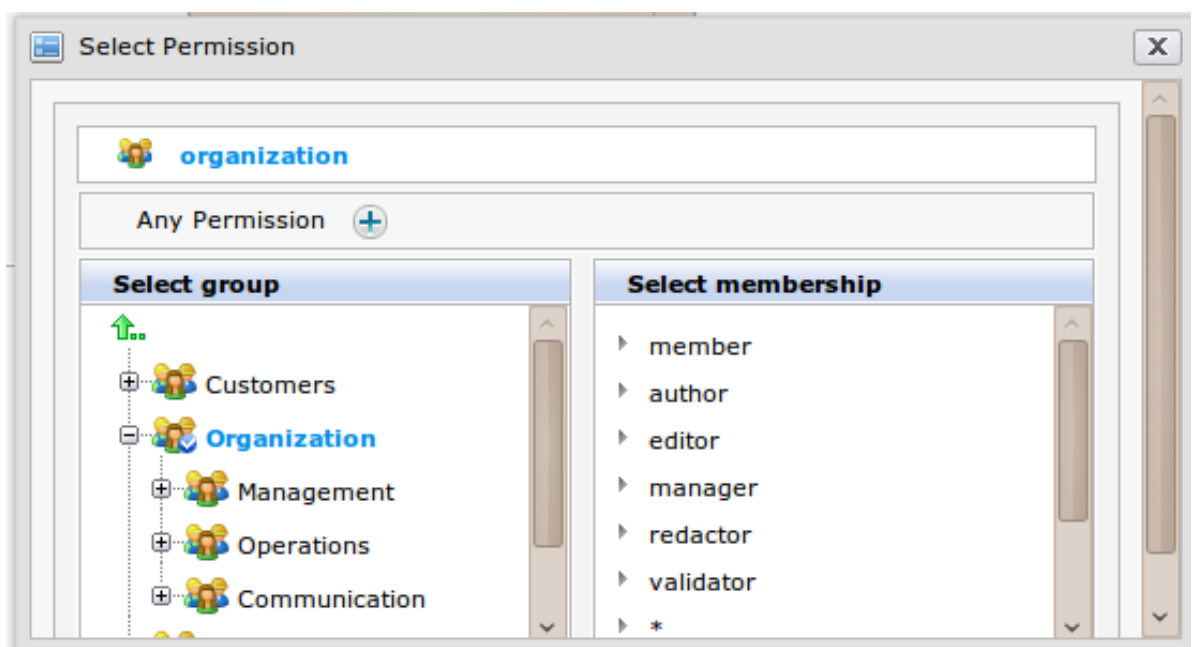
Click the **Document Template** check box if the template you are creating should be used as a template for a document.

### 6. Open Permissions dialog.

Click the **+** icon next to the **Permissions** field to open the **Select Permission** dialog.

### 7. Assign memberships to the group

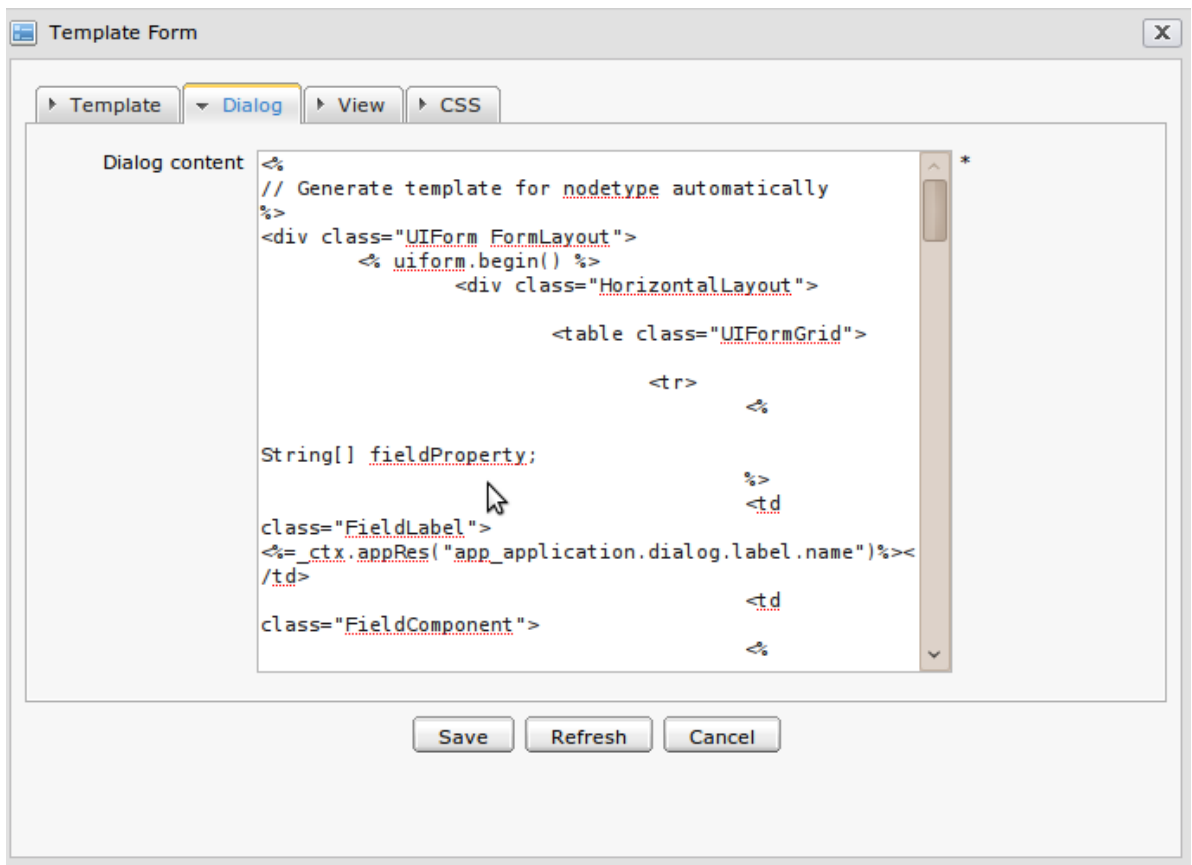
Select the group from the left panel and the membership from the right panel. Or you can set permission for everyone by clicking the **+** icon next to **Any Permission**.



**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.

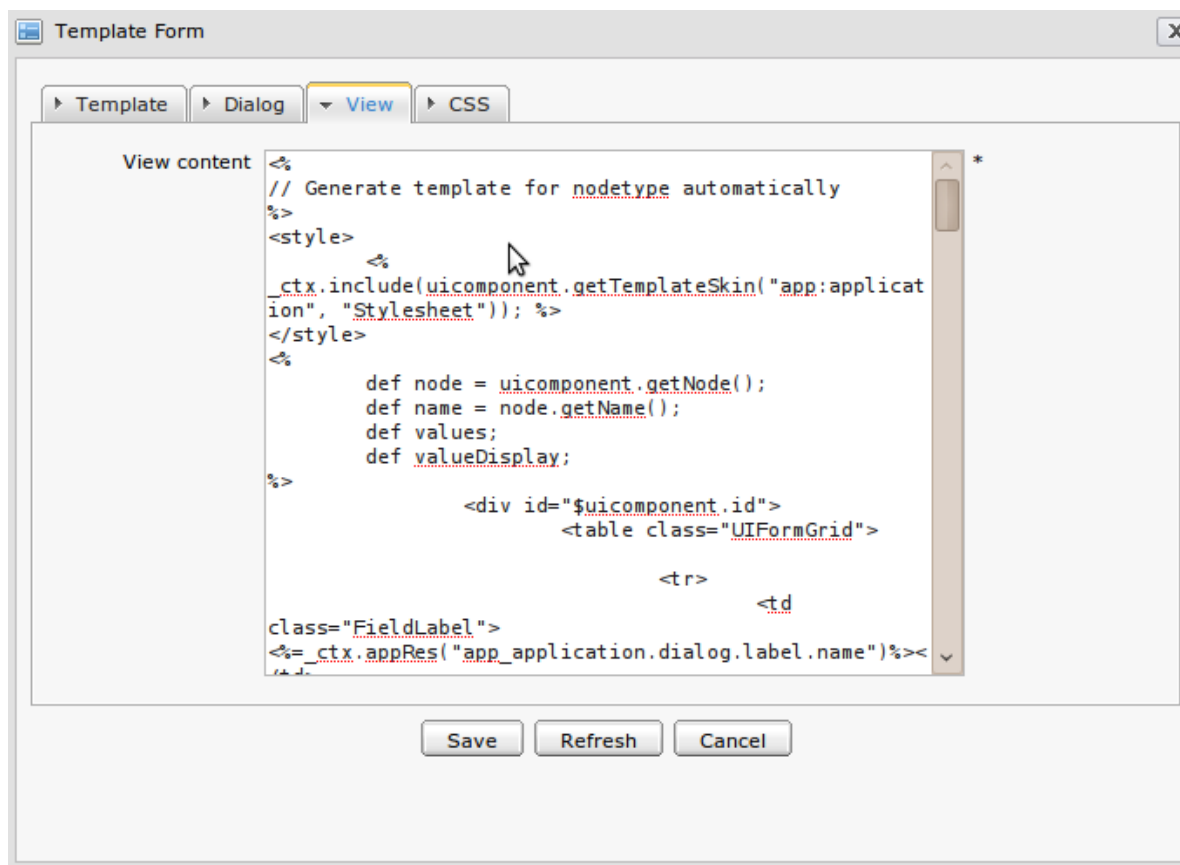


Figure 5.4. Manage Templates View Tab

## 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 5.11. Edit a Template

## 1. Go to the Manage Templates form

Click **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.



#### 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

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.



### 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 5.12. 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 5.13. View Metadata

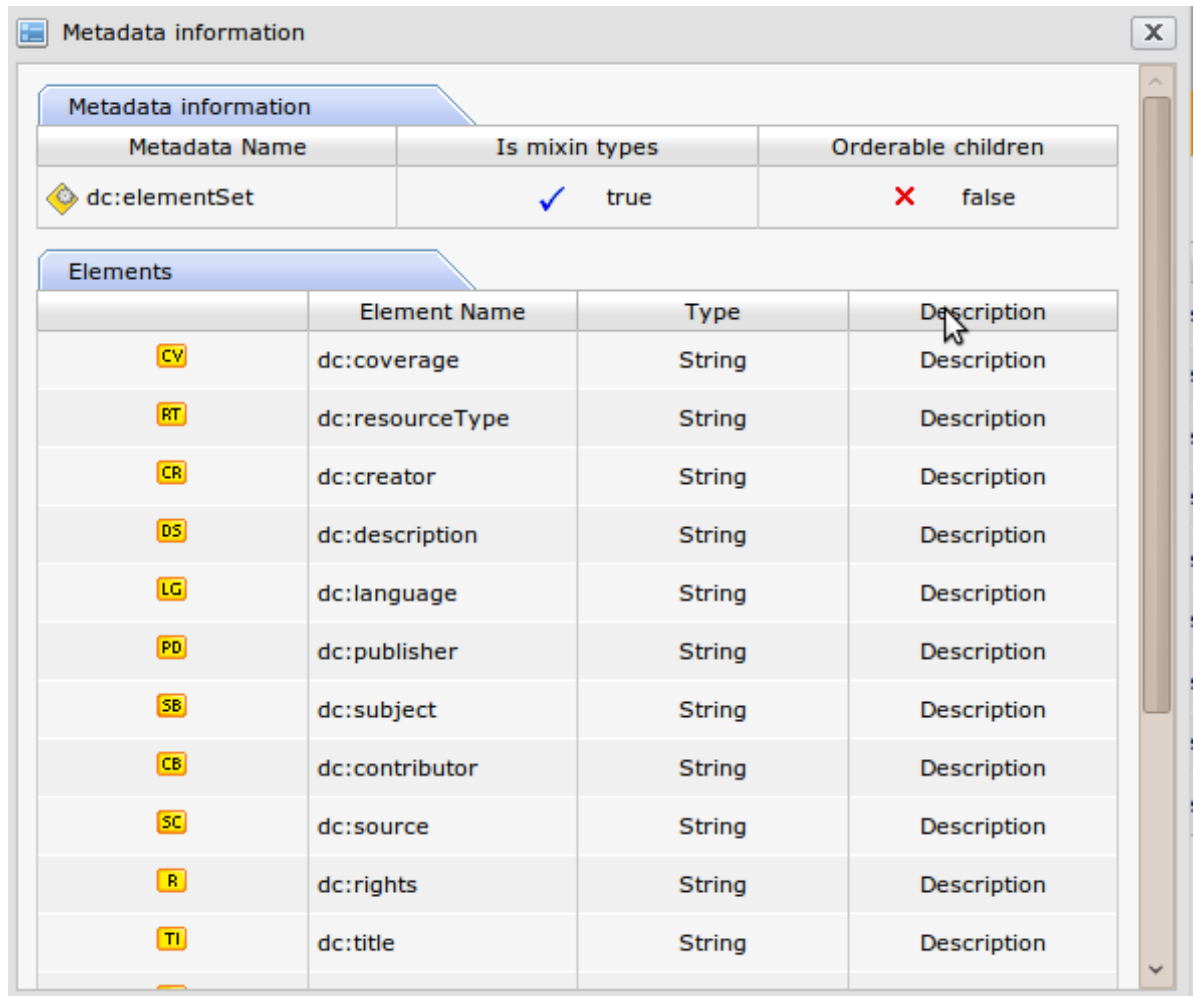
1. **Go to the Manage Metadata form**

Click **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.



The screenshot shows a window titled "Metadata information" with a close button (X) in the top right corner. Inside the window, there is a tab labeled "Metadata information". Below the tab is a table with three columns: "Metadata Name", "Is mixin types", and "Orderable children". The table contains one row with the following data:

Metadata Name	Is mixin types	Orderable children
 dc:elementSet	 true	 false

Below this table is another tab labeled "Elements". Below the "Elements" tab is a table with four columns: "Element Name", "Type", and "Description". The table contains 12 rows of data:

Element Name	Type	Description
 dc:coverage	String	Description
 dc:resourceType	String	Description
 dc:creator	String	Description
 dc:description	String	Description
 dc:language	String	Description
 dc:publisher	String	Description
 dc:subject	String	Description
 dc:contributor	String	Description
 dc:source	String	Description
 dc:rights	String	Description
 dc:title	String	Description

**Figure 5.5. Metadata Form**

### Procedure 5.14. 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.



#### Note

You cannot edit the metadata name.

### 3. Save changes

Click **Apply** to save all metadata changes.

## Procedure 5.15. 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 **Administration** → **Content Presentation** → **Manage View**. The **Manage View** form displays.

Views

ECM Templates

BC Templates

Name	Permissions	Action Tab	Base Version	Action
taxonomy-list	*:/platform/users	[ Info ] [ Actions ]		
admin-view	*:/platform /administrators	[ Admin ] [ Info ] [ Actions ] [ Collaboration ]		
taxonomy-icons	*:/platform/users	[ Actions ]		
anonymous-view	*	[ Actions ]		
icon-view	*:/platform/users	[ Actions ] [ Collaboration ]		
slide-show	*:/platform/users	[ Actions ] [ Collaboration ]		
simple-view	*:/platform/users	[ Actions ] [ Collaboration ]		
system-view	*:/platform /administrators	[ Info ]		
timeline-view	*:/platform /administrators	[ Actions ] [ Collaboration ]		
cover-flow	*:/platform/users	[ Actions ] [ Collaboration ]		

Add View

**Figure 5.6. Metadata Form**

**Views Tab.** The procedures that describe how to Add, Edit, Delete, and Preview views.

### Procedure 5.16. Add View

**1. Open the Add View form**

Click the **Add View** button located at the bottom of the **Manage View** form.

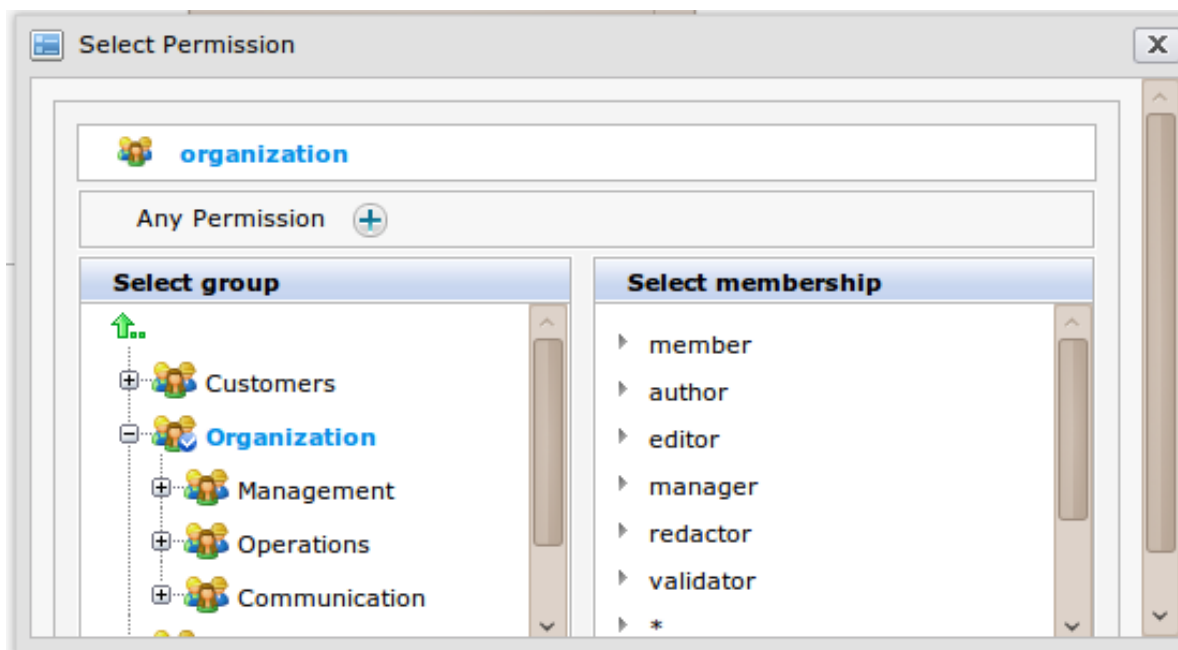
The Add View form opens.

**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 5.17. 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 cannot change the view name.

If you click the **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 5.18. 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.



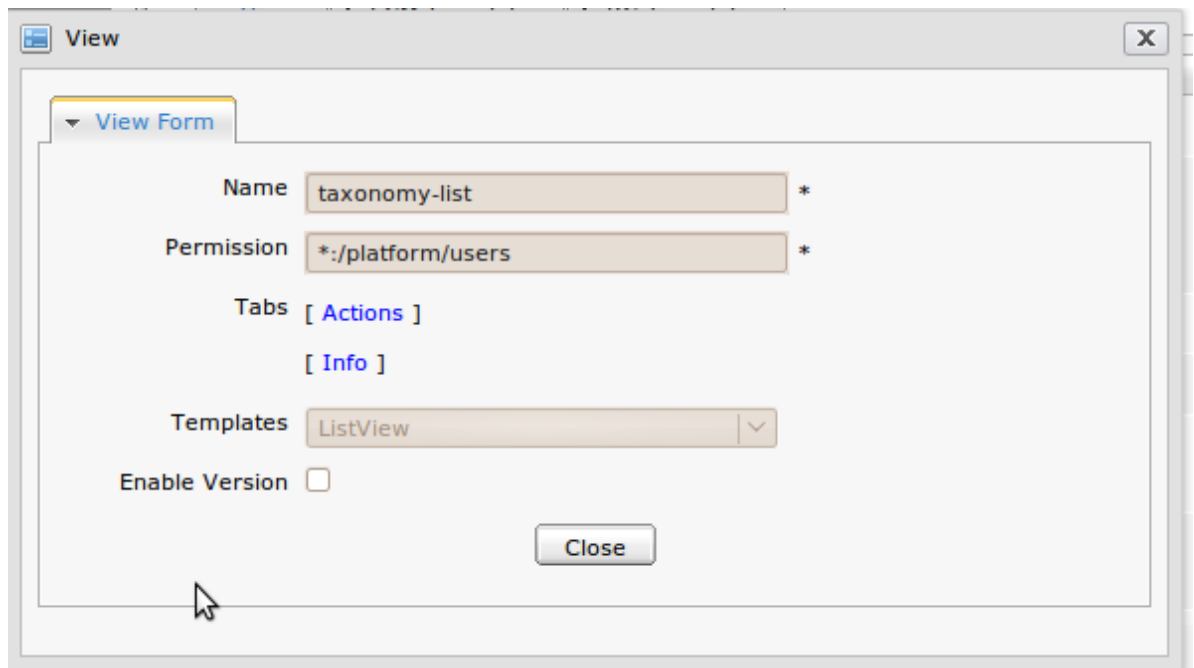
#### Note

You can not delete a view that is in use.

### Procedure 5.19. 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

 **Manage View**

Views   **ECM Templates**   BC Templates

Name	Value	Base Version	Action
CoverFlow	/exo:ecm/views/templates /ecm-explorer/CoverFlow		 
IconView	/exo:ecm/views/templates /ecm-explorer/IconView		 
ListView	/exo:ecm/views/templates /ecm-explorer/ListView		 
SlideShowView	/exo:ecm/views/templates /ecm-explorer/SlideShowView		 
SystemView	/exo:ecm/views/templates /ecm-explorer/SystemView		 
ThumbnailsView	/exo:ecm/views/templates /ecm-explorer/ThumbnailsView		 
TimelineView	/exo:ecm/views/templates /ecm-explorer/TimelineView		 

**Figure 5.9. ECM Templates**

#### Procedure 5.20. Add a new ECM Template

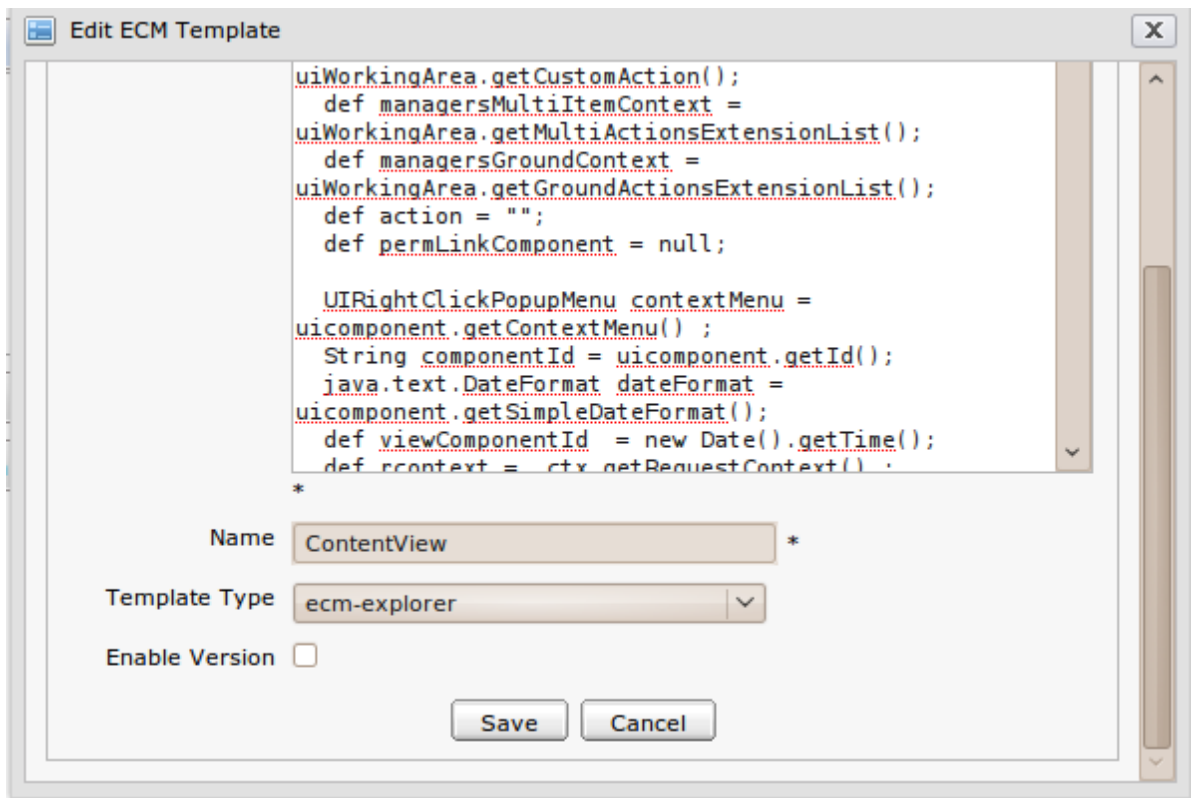
1. Select the ECM Templates tab.
2. Click the **Add** button to open the Add ECM Template form.

**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 5.21. 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.



### Note

You cannot 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 5.22. 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.

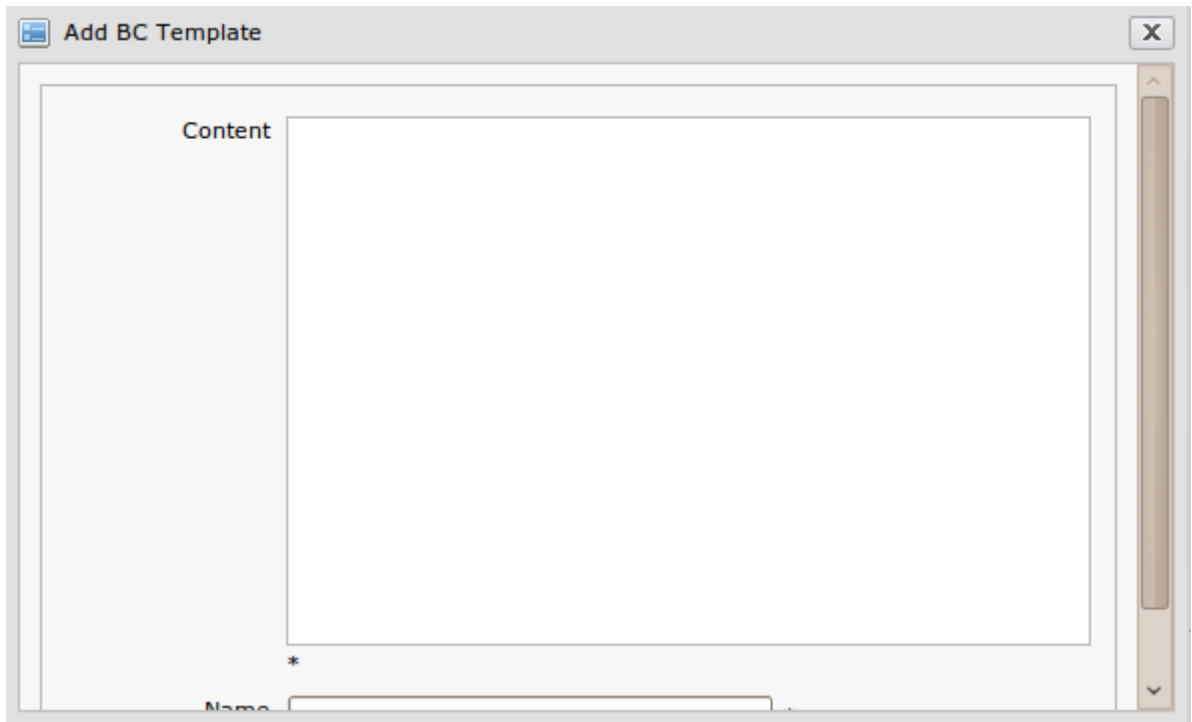
### 5.3.2.3.2. BC Templates

Name	Value	Base Version	Action
DocumentView	/exo:ecm/views/templates /content-browser/detail- document/DocumentView		
PathList	/exo:ecm/views/templates /content-browser/path/PathList		
QueryList	/exo:ecm/views/templates /content-browser/query /QueryList		
ScriptList	/exo:ecm/views/templates /content-browser/script /ScriptList		
TreeList	/exo:ecm/views/templates /content-browser/path/TreeList		

**Figure 5.12. BC Templates form**

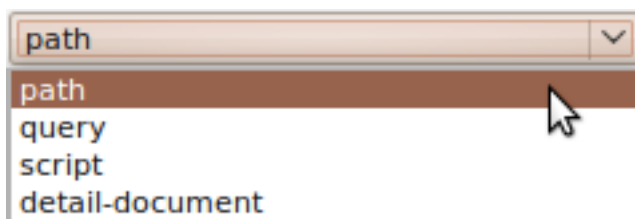
### Procedure 5.23. Adding a New Template

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

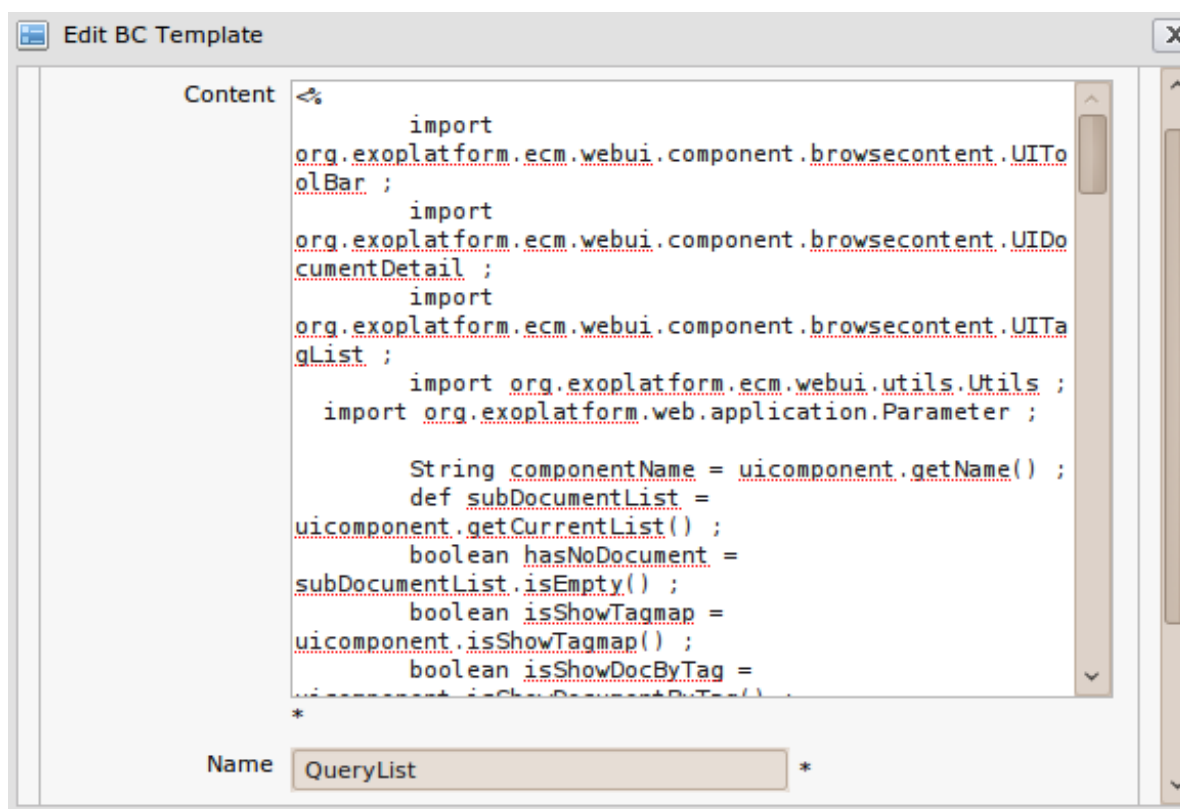
The name must be unique.

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

5. Click **Save** to complete adding a new template.

## Procedure 5.24. 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 cannot edit the template name.

You cannot 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 5.25. 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 the template, or **Cancel** to discard this action.


### 5.3.2.4. Drives Management

The function supports to manage drives in the **File Explorer**. It allows adding, editing and deleting drives.

Go to **Administration > Content Presentation > Manage Drives**.

 **Manage Drives**

Icon	Name	Workspace	Home Path	Permissions	View	Action
	Trash	collaboration	/Trash	*:/platform /administrators	icon-view, simple-view, cover-flow	 
	Validation Requests Documents Center	collaboration	/Documents /Validation Requests	*:/platform/users	simple-view, admin-view	 

Total pages: 4 

#### 5.3.2.4.1. Add a new drive

Use the  to add a new drive.

1. Click the **Add Drive** button in the **Manage Drives** form to open the **Add Drive** form.

▼ Drive ▶ Apply Views

Name  \*

Workspace system ▼

Home path

Workspace icon

Permissions  \*

Show referenced documents ☐

Show "non document" nodes ☐

Show sidebar ☐

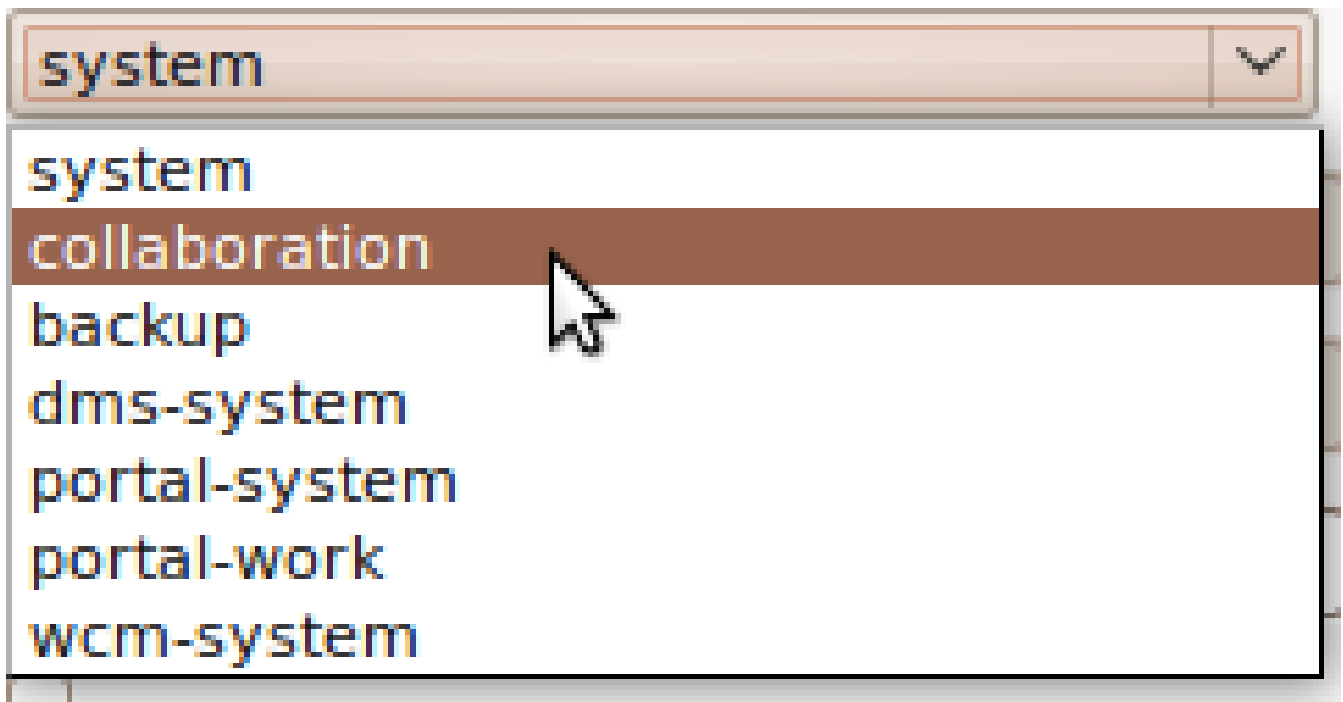
Show hidden nodes ☐

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

Allowance nodetype on left tree

Save Refresh Cancel

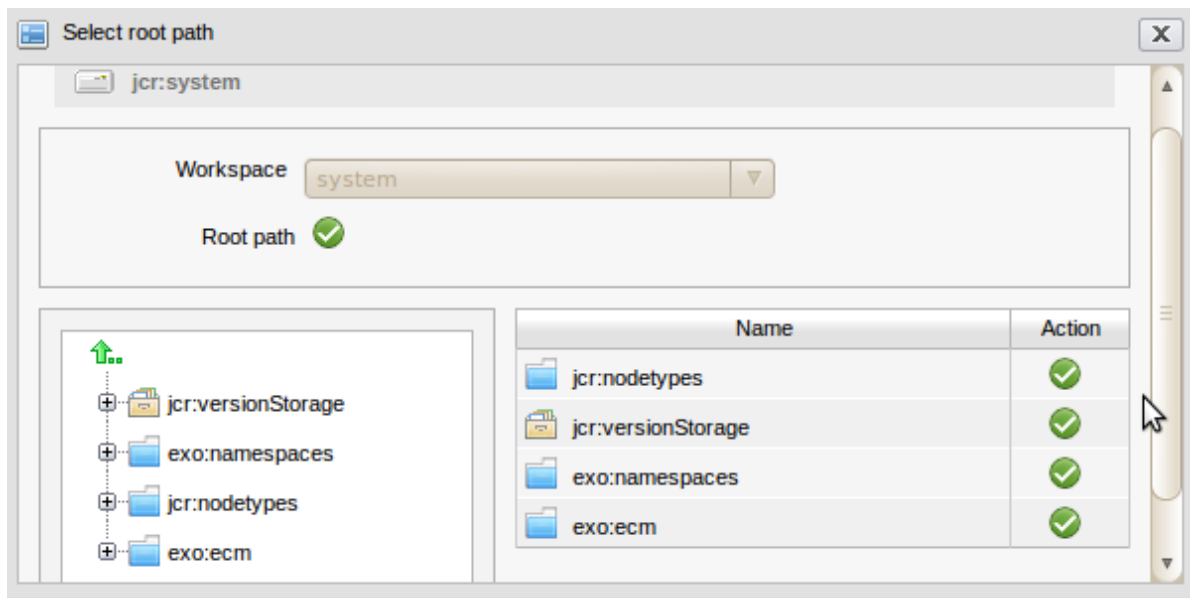
2. Input a name for the new drive in the **Name** field. (\*Required).
3. Select a workspace for the drive. There are 4 available workspaces: system, collaboration, backup, and dms-system.



4. Select the home path for the drive by clicking the



icon



5. Click the



icon to select the home path.

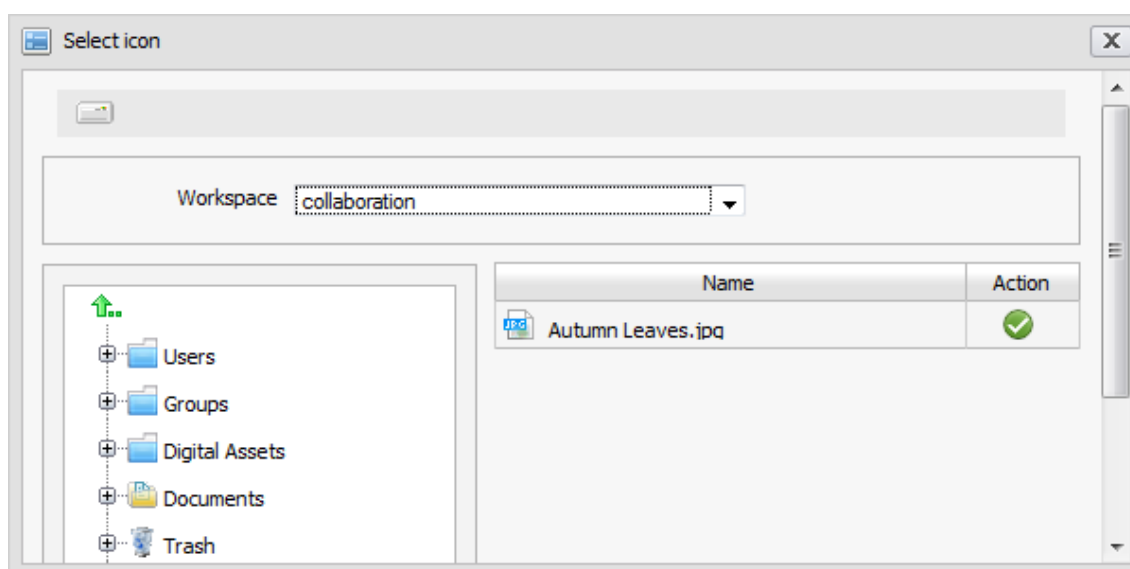
6. Select an icon for the workspace by clicking the



7. Click



to select an icon file:



8. Select permissions for groups that have access rights to this drive by clicking the



icon.

9. 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. 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. Click



to select a node type. The **Select node types** form will appear:

Icon	Node Type	Mixin Type	Select
	app:application	✗ False	<input type="checkbox"/>
	app:applicationregistry	✗ False	<input type="checkbox"/>
	app:category	✗ False	<input type="checkbox"/>
	app:gadgetdata	✗ False	<input type="checkbox"/>

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 corresponding 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 asterisk '\*')

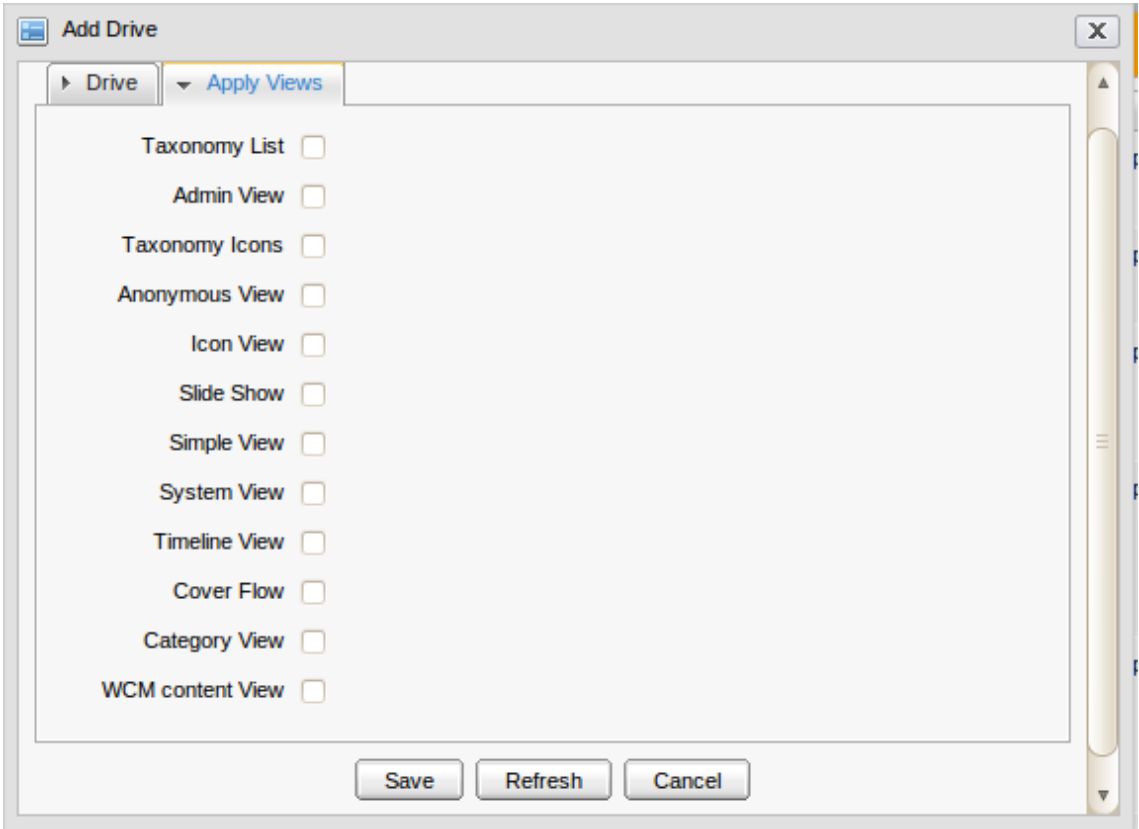
Click

the



if you want to remove the selected nodetype.

12. Select the **Apply Views** tab and select the view type you want to be available in the drive:



13. Click **Save** to commit the details and create the new drive, **Refresh** to clear the form or **Cancel** to abort the operation.

**Procedure 5.26. Edit a drive**

1. Click the



icon that corresponds to the drive you want to edit. The **Edit drive** for will appear:


2. Edit the properties as required.
3. Click **Save** to commit the changes.



### Drive Name

The drive name can not be edited in this form.

## Procedure 5.27. Delete a drive


1. Click  the   
that corresponds to the drive you want to delete.
2. Click **OK** on the confirmation message to delete the drive or click **Cancel** to abort the operation.

### 5.3.3. Content Types

#### 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 enables users to register the namespace used in the system.

Go to **Administration > Content Types > Namespace Registry** to open the **NamesPace Registry** form.

 **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 > >>

**Figure 5.16. Namespace Registry**

#### Procedure 5.28. Registering a Namespace

1. Click the **Register** button on the Namespace Registry form to register a new namespace.

 **Register new Namespace** X

Namespace Prefix  \*

Uri  \*

**Figure 5.17. Namespace Registration Form**

2. Enter the value for the Namespace Prefix field. (\* Required).
3. Enter the value for the Uri field. This field must be unique. (\*Required).





### Important





















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

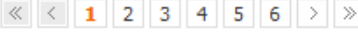
## 5.3.3.2. Manage Node Types

This function is used to control all node types in WCM.

 **Manage Node Type**

Node type name  

Icon	Node type	Mixin type	Orderable child nodes	Description	Action
	app:content	✗ false	✗ false	nothing	
	app:contentcategory	✗ false	✓ true	nothing	
	app:contentregistry	✗ false	✓ true	nothing	
	app:gadgetdata	✗ false	✗ false	nothing	
	app:gadgetdefinition	✗ false	✗ false	nothing	
	app:gadgetregistry	✗ false	✗ false	nothing	
	app:localgadgetdata	✗ false	✗ false	nothing	
	app:remotegadgetda	✗ false	✗ false	nothing	
	dc:elementSet	✓ true	✗ false	nothing	
	exo:accessControllab	✓ true	✗ false	nothing	

Total pages: 18 

**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.

View Node Type Information

Node type

Name space: app

Node type name: application

Is mixin type: false

Orderable child nodes: false

Primary item name:

Super types: gtn:protectedresource, mix:referenceable

Property definitions:

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

**Figure 5.19. View Node Type Information Form**

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

### Procedure 5.29. Add Node Type

1. Open the Add/Edit Node Type Definitions form by clicking the **Add** button on the Manage Node Type Form.

The screenshot shows a dialog box titled "Add/Edit Node Type Definitions". It has three tabs: "Node type" (selected), "Property", and "Child node". The "Node type" tab contains the following fields and controls:

- Name space:** A dropdown menu.
- Node type name:** A text input field.
- Is mixin type:** A dropdown menu currently showing "false".
- Orderable child nodes:** A dropdown menu currently showing "false".
- Primary item name:** A text input field.
- Super types:** A text input field followed by a blue "+" button.
- Property definitions:** A section header.
- Child node definitions:** A section header.
- Buttons:** "Save", "Save draft", and "Cancel" at the bottom.

**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**

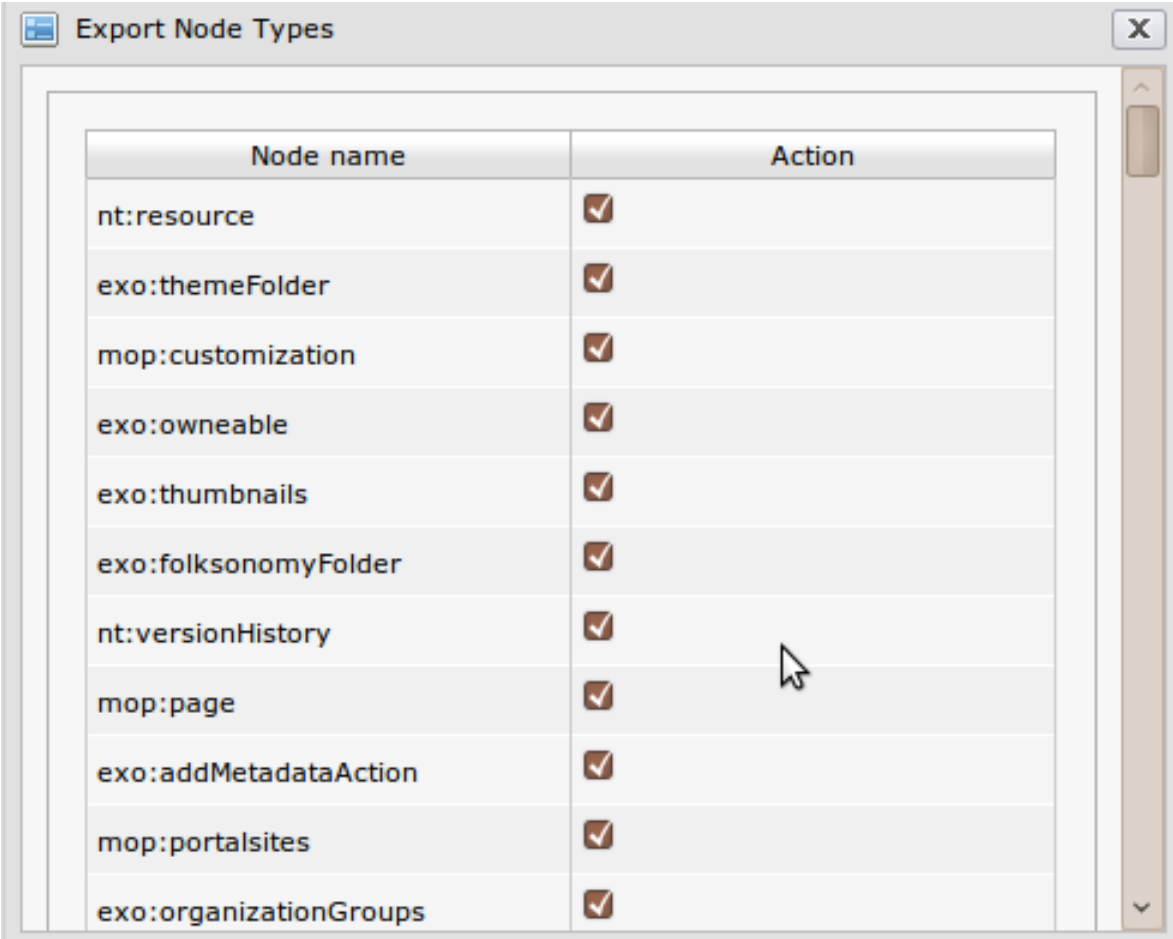
The name must not contain special characters like !, @, #, \$, %, &, \*, (, ).

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.

- Property definitions: lists all definition names of Property tab.
- Child node definitions: lists all definition names of Child node tab.
- 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 5.30. Export Node Types

- Open the Export Node Types form by clicking the **Export** button on the Manage Node Type Form.




Node name	Action
nt:resource	<input checked="" type="checkbox"/>
exo:themeFolder	<input checked="" type="checkbox"/>
mop:customization	<input checked="" type="checkbox"/>
exo:owneable	<input checked="" type="checkbox"/>
exo:thumbnails	<input checked="" type="checkbox"/>
exo:folksonomyFolder	<input checked="" type="checkbox"/>
nt:versionHistory	<input checked="" type="checkbox"/>
mop:page	<input checked="" type="checkbox"/>
exo:addMetadataAction	<input checked="" type="checkbox"/>
mop:portalsites	<input checked="" type="checkbox"/>
exo:organizationGroups	<input checked="" type="checkbox"/>

**Figure 5.21. Export Node Types Form**

- Click **Uncheck all** if you do not want to export all node types. After clicking **Uncheck all**, this button becomes the **Check all** button.
- Select nodes that you want to export by ticking the checkboxes.
- Click the **Export** button in this form.

5. Select the location in your computer to save the exported node.

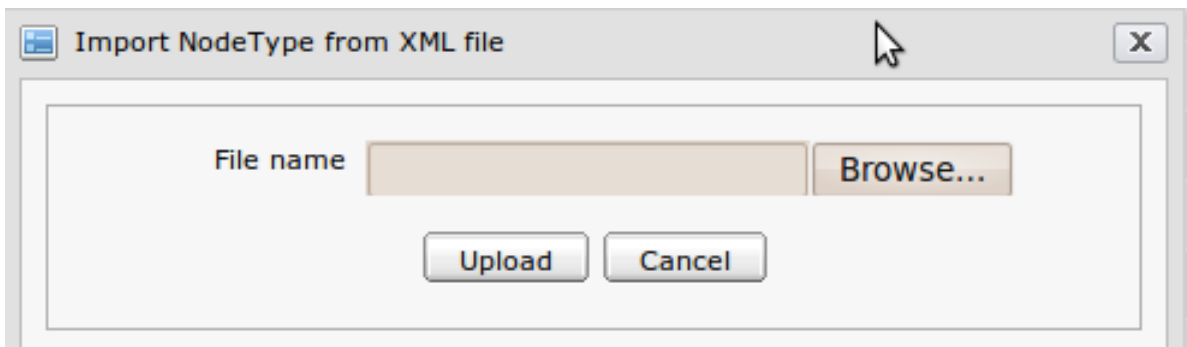


### Important

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 5.31. Import Node Types

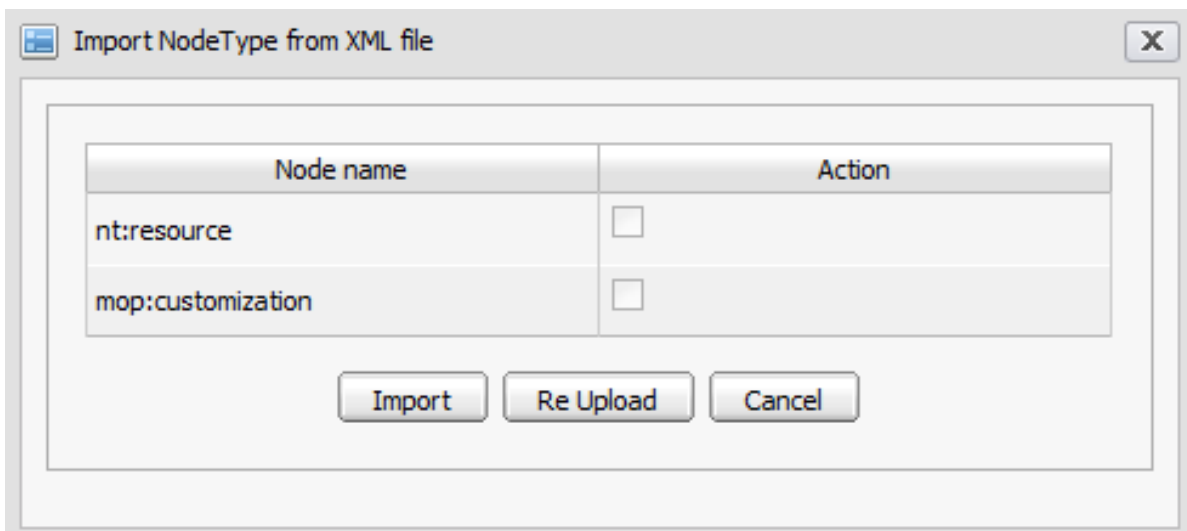
1. Open the Import Node Type from XML file form by clicking the **Import** button on the Manage Node Type Form.



The dialog box titled "Import NodeType from XML file" contains a "File name" input field and a "Browse..." button. Below these are "Upload" and "Cancel" buttons.

**Figure 5.22. Import Node Type from XML file Form**

2. Click the **Browse** button to upload a file.



The dialog box titled "Import NodeType from XML file" now displays a table with the following content:

Node name	Action
nt:resource	<input type="checkbox"/>
mop:customization	<input type="checkbox"/>

Below the table are "Import", "Re Upload", and "Cancel" buttons.

**Figure 5.23. Browse for XML files containing Node Types**



### Important

You must upload an XML file. This file is in the node type's format.

- 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.

- Tick the checkboxes corresponding to the nodes that you want to import.
- Click the **Import** button to complete importing a node type.

## 5.3.4. Advanced Configuration







### 5.3.4.1. Manage Queries

The function supports you to manage queries. It allows adding, editing and deleting queries.

Go to **Administration > Advanced Configuration > Manage Queries**.



#### Manage Queries

Name	Type	Statement	Permissions	Actions
All Articles	xpath	//element(*,exo:article) order by @exo:dateCreated descending	*:/platform/users	 
Created Documents	xpath	//*[(@jcr:primaryType = 'exo:article' or @jcr:primaryType = 'nt:file') and @exo:owner='\${UserId}\$'] order by @exo:dateCreated descending	*:/platform/users	 
CreatedDocumentDayBefo	xpath	//element(*,exo:article) [@exo:dateCreated < xs:dateTime('\${Date}\$')] order by @exo:dateCreated descending	*:/platform/users	 

Add Query

### Procedure 5.32. Add a new query

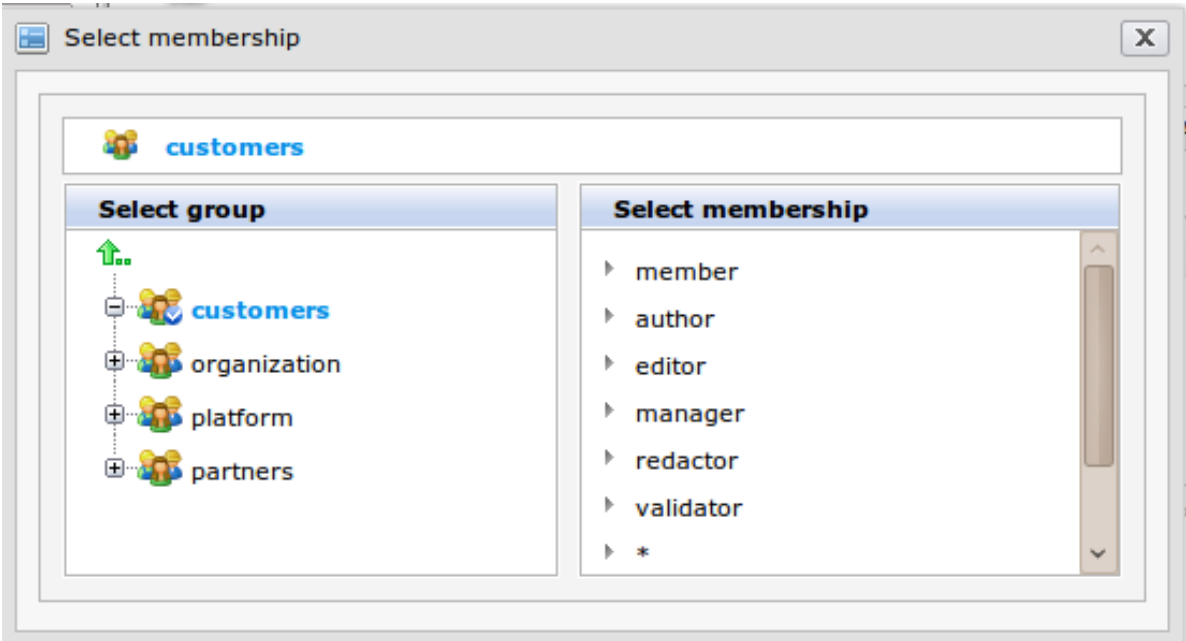
1. Show the **Add Query** form by clicking the **Add Query** button in the **Manage Queries** form.

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 first time you use this query to search, the result will be cached. For the second time you search using this query, it will show the cached results. After 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 5.33. Edit a query**

1. Click the



icon corresponding to the query you want to edit. The **Edit Query** form will appear:

**Edit query**

Query name: All Articles \*

Query type: XPath

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

Enable cache results ☒

2. Edit the properties of the selected query.
3. Click **Save** to accept all changes.

### Procedure 5.34. 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 enables users to manage all script codes in the **WCM** and **Browser Content** system.

Go to **Administration > Advanced Configuration > Manage Scripts**.

Manage Scripts

ECM Scripts

BC Scripts

Select category: action

Name	Path	Base Version	Actions
AddMetadataScript.groovy	...ction/AddMetadataScript.gr		
AddTaxonomyActionScript.grc	...AddTaxonomyActionScript.!		
AutoVersioningScript.groovy	...on/AutoVersioningScript.grc		
EnableVersioningScript.groovy	.../EnableVersioningScript.gro		
GetMailScript.groovy	...er/action /GetMailScript.groovy		
ProcessRecordsScript.groovy	...on/ProcessRecordsScript.gr		
PublishingRequestScript.groov	...PublishingRequestScript.grc		
RSSScript.groovy	...plorer/action /RSSScript.groovy		
SendMailScript.groovy	...r/action /SendMailScript.groovy		
TransformBinaryChildrenToTe:	...aryChildrenToTextScript.gr		

Total pages: 2

12

Add

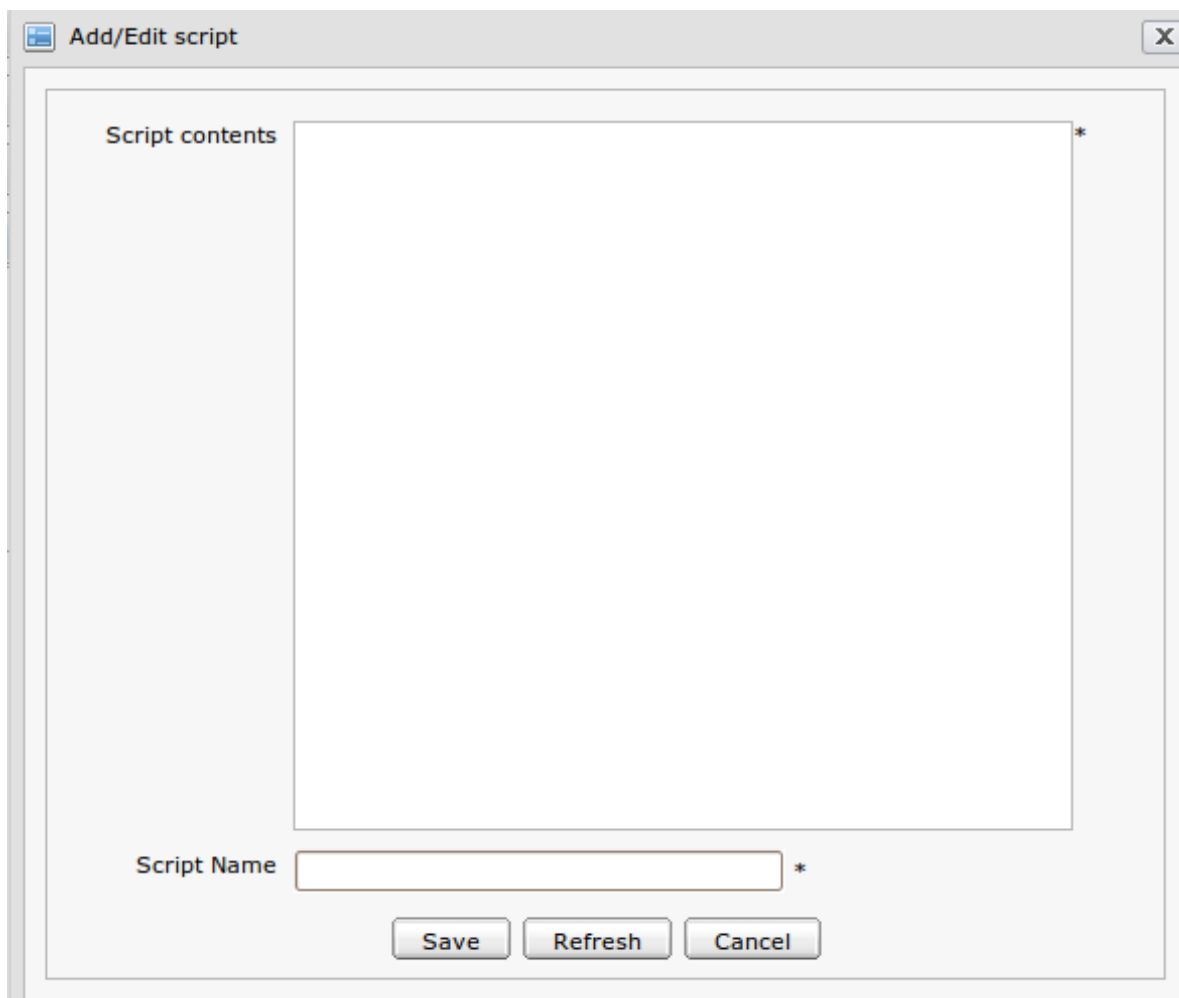
Details:

- **WCM Scripts:** scripts are used in **WCM**
- **BC Scripts:** scripts are used in **Content Browser**.

The ECM Scripts tab:

### Procedure 5.35. 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:

A screenshot of a web-based dialog box titled "Add/Edit script". The dialog has a close button (X) in the top right corner. Inside, there is a large text area labeled "Script contents" with a small asterisk (\*) at the top right. Below this text area is a text input field labeled "Script Name" with an asterisk (\*) to its right. At the bottom of the dialog are three buttons: "Save", "Refresh", and "Cancel".

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.

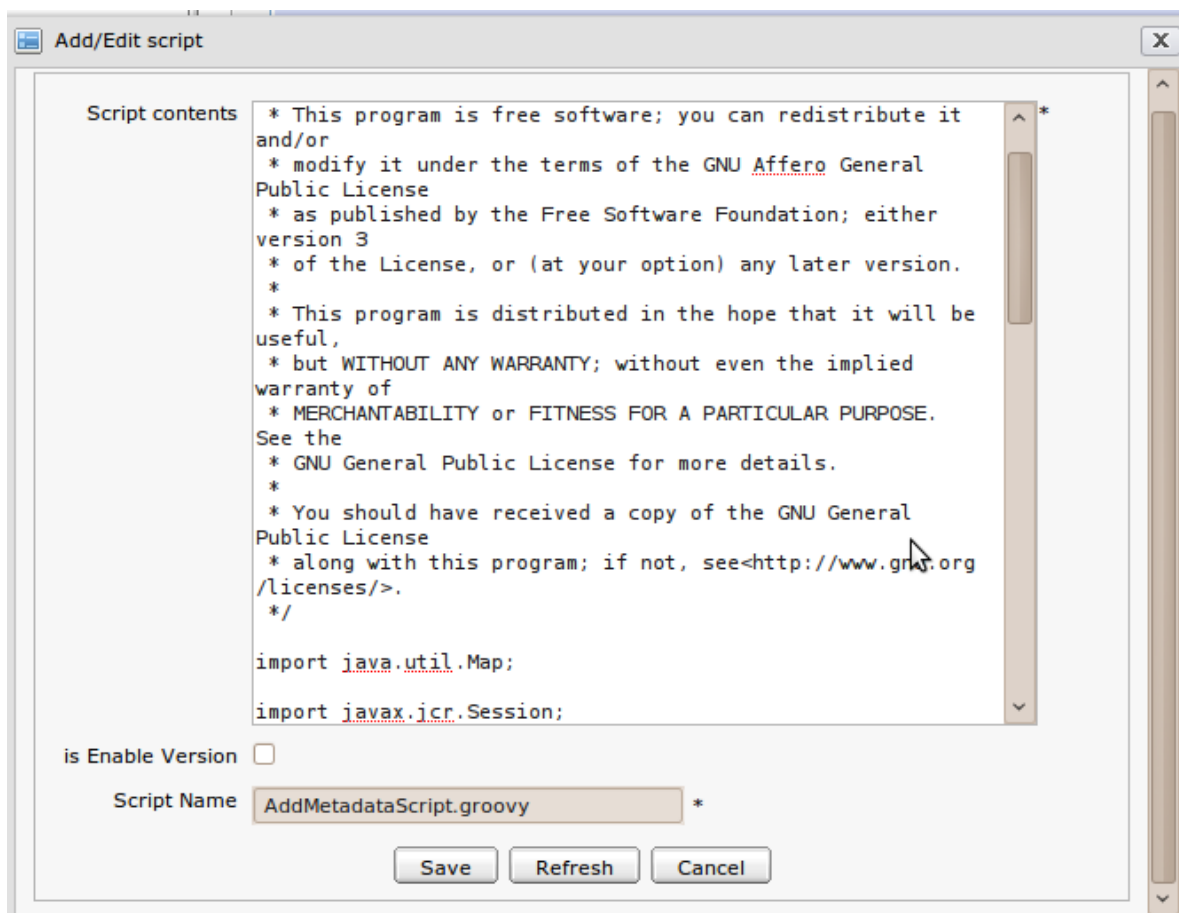
### Procedure 5.36. Edit an ECM script

To edit an ECM script, do the following:

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 **Save** to save all changes.

### Procedure 5.37. Delete an ECM script

To delete an ECM script, do the following:


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:**

 **Manage Scripts**


► ECM Scripts ▼ **BC Scripts**

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

### Procedure 5.38. Add a BC script

To add a BC script, do the following:

1. In the **Manage Scripts**, select the **BC Scripts** tab.
2. Click **Add** to open the **Add/Edit script** form:

 **Add/Edit script** X

Script contents

Script Name  \*

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 5.39. Edit a BC script

To edit a BC script, do the following::

1. In the **BC Script** tab, click



on a script that you want to edit.

The **Add/Edit script** form will appear:

Script contents

```
repositoryService_ = repositoryService ;
}

public void execute(Object context){
    DataTransfer data = (DataTransfer) context ;
    Session session = null ;
    try{
        String repository = data.getRepository();
        String workspace = data.getWorkspace() ;
        session =
        repositoryService_.getRepository(repository).login(workspace
    ) ;
        QueryManager queryManager =
        session.getWorkspace().getQueryManager();
        Query query = queryManager.createQuery("/jcr:root
//element(*, exo:article)", Query.XPATH);
        QueryResult queryResult = query.execute();
        NodeIterator iter = queryResult.getNodes() ;
        List nodeList = new ArrayList() ;
        while(iter.hasNext()) {
            Node node = iter.nextNode() ;
            nodeList.add(node) ;
        }
        data.setContentList (nodeList) ;
        session.logout();
    }
```

is Enable Version ☐

Script Name  \*

Save Refresh Cancel

2. Edit the properties that you want.
3. Click **Save** to accept all changes.

### Procedure 5.40. Delete a BC script

To delete a BC script, do the following:

1. In the **BC Scripts** tab, click



on the script you want to delete. A confirmation message appears.

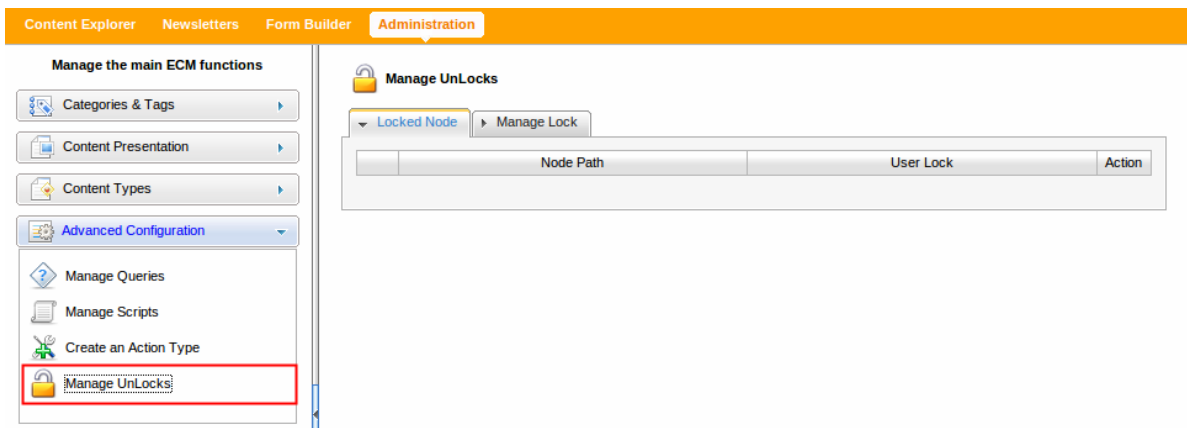
2. Click **OK** to accept deleting this script, or **Cancel** to discard this action.

### 5.3.4.3. Manage Unlocks

All locked nodes are listed and managed by administrators in the **Administration page**. There are two ways that help administrators unlock nodes: unlock nodes in the right-click the menu in **Content Explorer** or unlock nodes in the **Administration page**.

#### Procedure 5.41. Unlock Nodes

1. Go to **Administration** on the navigation bar.
2. Select **Advanced Configuration > Manage Unlocks** on the **Manage the main ECM functions** pane 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



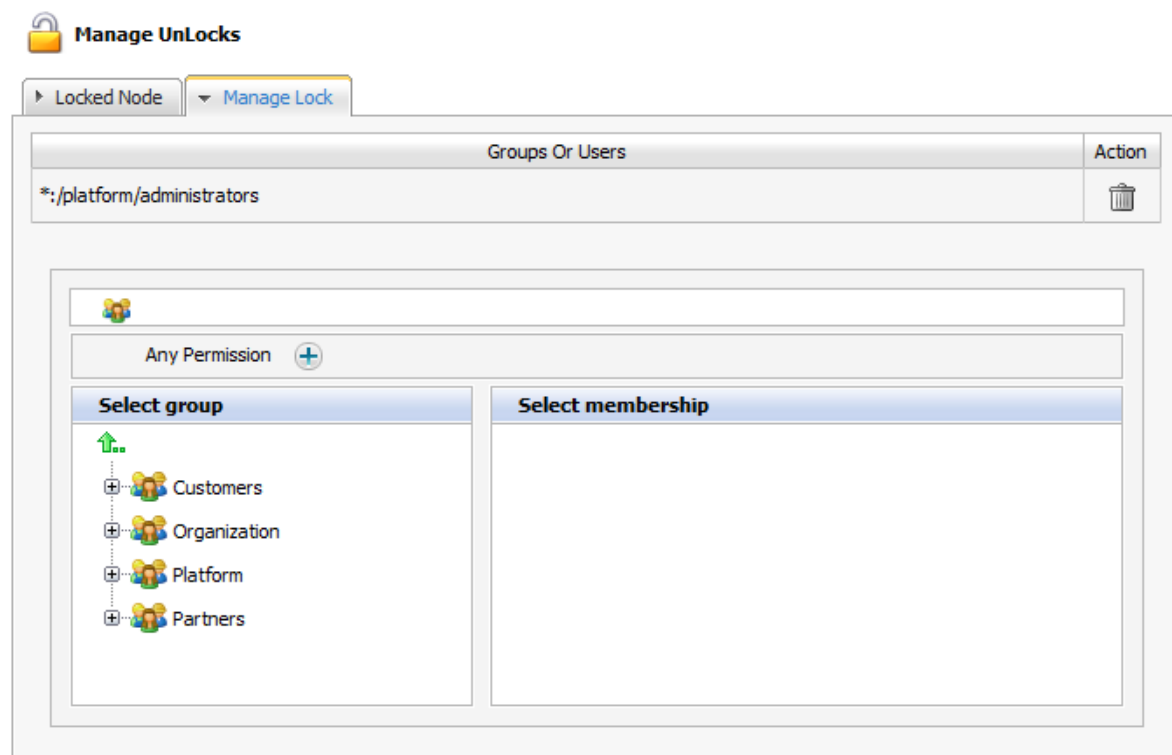
that corresponds to nodes which need to be unlocked. The unlocked nodes will disappear from the locked node list.

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 listed 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 from the Unlock permission list except the group `*:/platform/administrator` and `root`.

### 5.3.4.4. Create Action Types

This function allows managing of all action nodes in the **eXo Content**.

#### Procedure 5.42. Create an Action Type

1. Go to the **Sites Administration** on the navigation bar.
2. Select **Advanced Configuration > Create an Action Type**.



## Create an Action Type

Name	Extends Action Type
exo:action	[nt:base]
exo:addMetadataAction	[exo:action] [exo:scriptAction] [nt:base]
exo:autoVersioning	[exo:action] [exo:scriptAction] [nt:base]
exo:createRSSFeedAction	[exo:action] [exo:scriptAction] [nt:base]
exo:enableVersioning	[exo:action] [exo:scriptAction] [nt:base]
exo:folksonomyAction	[exo:action] [exo:scriptAction] [nt:base]
exo:getMailAction	[exo:action] [exo:scriptAction] [nt:base]
exo:processRecordAction	[exo:action] [exo:scriptAction] [nt:base]
exo:sendMailAction	[exo:action] [exo:scriptAction] [nt:base]
exo:taxonomyAction	[exo:action] [exo:scriptAction] [nt:base]

Total pages: 2 &lt;&lt; &lt; 1 2 &gt; &gt;&gt;

Add

- Click the **Add** button to open the **Action Type Form** form:

Action Type Form

Extends Action Type

exo:scriptAction

Name (starts with "exo:")

is Action Move

☐

Execute

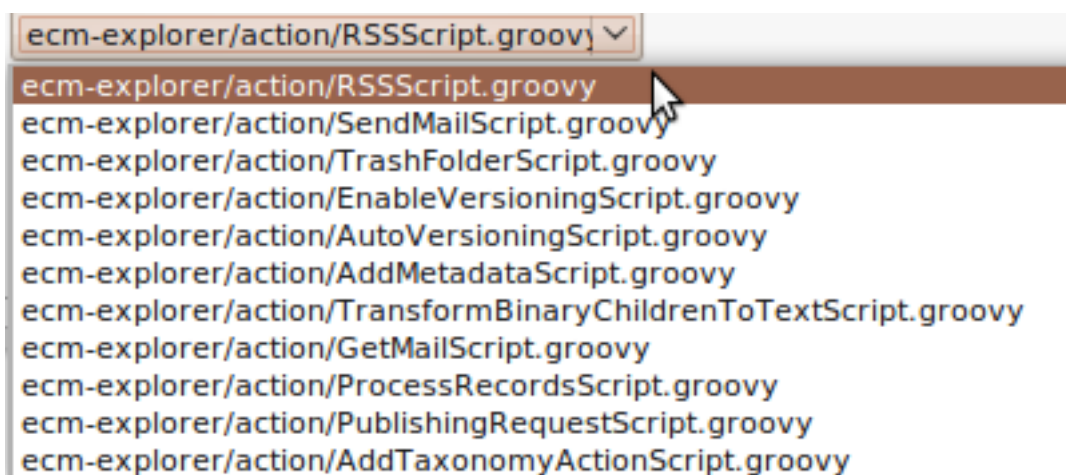
ecm-explorer/action/RSSScript.groovy

Variables

Save

Cancel

- Select the action type.
- Input a name for the action.
- Check/uncheck the **"is Action Move"** option: the action will have exo:move property or not.
- 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) [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) [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/) [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) [http://forums.exoplatform.org/portal/public/classic/forum]



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# Appendix A. Revision History

## Revision History

Revision 1-2.1.1                      Fri Nov 19 2010

Updated docbook source to WCM 2.1.1

Revision 1-2.0                      Mon Oct 25 2010

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ScottMumford<smumford@redhat.com>,

LauraBailey,                      TomWells,

EslpethThorne,

RebeccaNewton, JaredMorgan

Completed docbook conversion.

Revision 1-0                      Tue Sep 28 2010

Initial creation of book by publican

ScottMumford<smumford@redhat.com>

