User Guide

A guide to using eXo Content.

by eXo Platform Documentation Team (eXo Platform)

edited by Scott Mumford (Red Hat)

1. Give us Feedback

If you find a typographical error, or know how this guide can be improved, we would love to hear from you. Submit a report in JIRA against eXo Content. The following link will take you to bug report for eXo Content *http://jira.exoplatform.org* [http://jira.exoplatform.org/secure/Dashboard.jspa].

Select the document name and version number relevant to the document you found the error in from the available lists then complete the description with as much detail as you can provide.

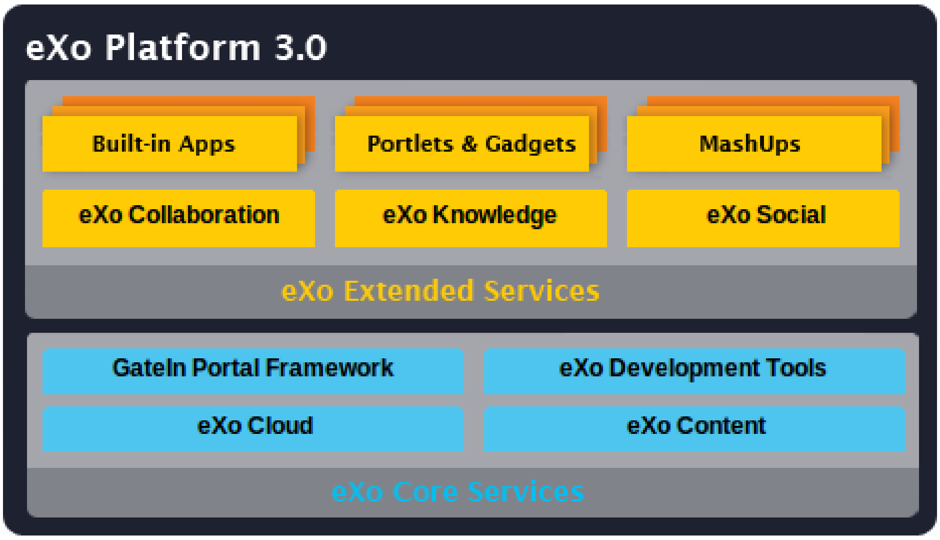
Be sure to give us your name so that you can receive full credit for reporting the issue.

Overall Introduction

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 from across the globe. 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 application that incorporates portal and content management systems. Users of the platform have a customized single point of access to their 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 such eXo Core service. It provides a set of services to extend portal-based applications with Enterprise Content Management (ECM) capabilities. Document Management System (DMS) features make it easy to catalog and organize enterprise content and with powerful Web Content Management (WCM) services to quickly build dynamic, content-rich websites.

1.2. Why Use eXo Content

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

Website Creation

Fast Setup:
: Set up 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 enables 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 life-cycles.

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 tools, collaboration tools and more. All eXo Content features are designed to meet your requirements in site management and maximise the cost reduction that comes of managing multiple sites from 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 the 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.

Default Accounts

The following accounts (username/ password) will be used throughout this guide:

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

1.4. References and Related Sources

Information

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

Support

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

Downloads

- *eXo Content* [http://www.exoplatform.com/company/public/website/platform/exo-core-services/exo-content]
- *eXo Development Tools* [http://www.exoplatform.com/company/public/website/platform/exo-core-services/exo-development-tools]
- *GateIn Portal Framework* [http://www.exoplatform.com/company/en/platform/exo-core-services/gatein-portal-framework]
- *eXo Collaboration* [http://www.exoplatform.com/company/public/website/platform/exo-extended-services/exo-collaboration]
- *eXo Knowledge* [http://www.exoplatform.com/company/public/website/platform/exo-extended-services/exo-knowledge]

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

Resource Center

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

Product Introduction

2.1. eXo Content

eXo Content is the singular name for 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 eXo Content users can manage both structured and unstructured content, so that an organization, such as a business or a governmental agency, can more effectively meet business goals (increasing the profits or improving 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).

eXo Content 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 eXo Content portlet gives you a portal solution that can help you achieve these processes and leverage your business content across all formats for competitive gain. It also provides an environment for employees to share and collaborate on digital content and delivering a comprehensive unified solution with rich functionalities. Every component of your website can be organized, or easily reconstructed, which helps you keep your website under control.

eXo Content consists of three parts:

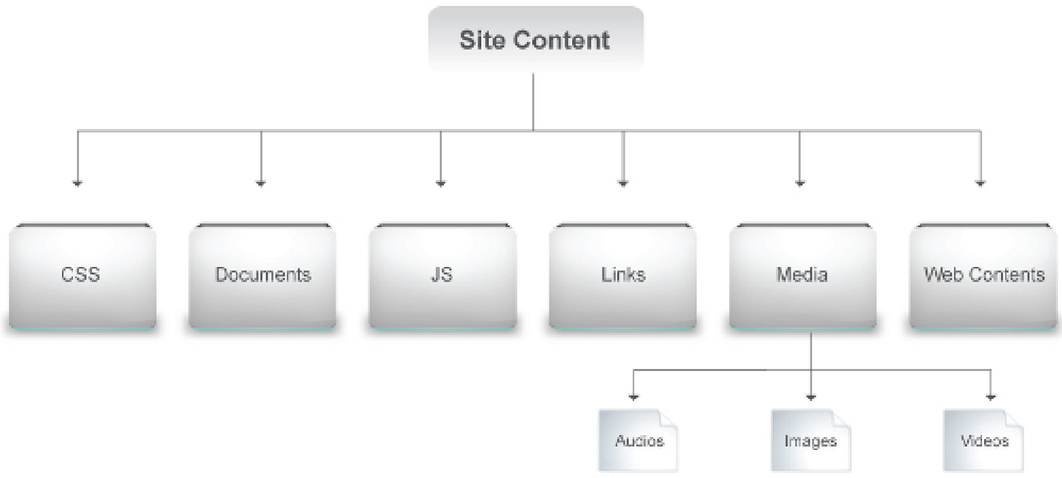
Document Management System
: An extension of eXo Content is used to store, manage and track electronic documents and electronic images and allows documents to be modified and managed easily and conveniently by managing versions, properties, and more.

Workflow
: A way of looking at and controlling the processes presented in an organization such as service provision or information processing, etc. It is an effective tool to use make certain that the processes are effective with the purpose of better and more cost efficient organization.

Web Content Management
: Which helps in maintaining, controlling, changing and reassembling the content on a web-page. It also helps webmasters who handle all tasks needed to run a website, including development, design, content publication and monitoring.

2.2. Site Content Structure

While creating a site is a quick process, deciding what content to put into it and how to organize that content can take some time. Therefore, to make managing a site as easy and effective as possible, a site created with eXo Content will always adhere to a specific structure:



The Site Content is stored in collaborative workspaces of the underlying Java Content Repository (JCR).

Details:

CSS
: Files in this folder are used to define the presentation of your entire site, such as font, color, size and more.

Documents:
: All the documents which are used in the site will be stored in this folder.

JS
: This folder contains programming scripts used on the site. Resources in this folder help make a web page's graphics and navigation more animated and dynamic.

Links:
: This folder stores all the links used in the site.

Media:
: This folder contains three sub-folders:

  Audios:
  : All sound files used in a site are stored here.

  Images:
  : Pictures and other images used in a site are stored here.

Videos:
All video files used in a site are stored here.

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

2.3. Web Content

2.3.1. Web Content

The *Web Content* is the visual or aural content that is encountered as part of the user experience on a website. It include any or all of the following elements; text, images, sounds, videos and animations.

2.3.2. Web Content Structure

Much like the website as a whole, ensuring Web Content adheres to a specific structure makes creating and managing the content more effective and dynamic.

Main content:
This is the key content, the text, images, links, tables, and other elements that make up the bulk of the web content.

Illustration:
This folder contains an image that is used as an illustration for the content. A summary also can be added to this image.

default.css:
This folder contains CSS data which is used to present the web content. CSS controls the layout, font, color, and more.

default.js:
This folder contains JS data which is used to make web content more dynamic.

2.4. Terminologies

2.4.1. Repository

A repository is a location where data is stored and maintained. The content repository stores web content and related digital data and is accessible to users locally, without requiring content to be transferred 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 a network (the Internet, for example).

In this case, the content repository consists of more than one workspace. The *repository* repository contains multiple workspaces, including: *system*, *backup* and *collaboration* workspaces.

System workspace:
: This workspace is used to reserve *system folders*.

Backup workspace:
: The backup process depends on the timestamps of published content; each published document has a defined period for which it can be published and, when it exceeds that time frame, it will be automatically archived to the backup database.

  This workspace is mostly used when utilizing the Workflow based content publication life-cycle.

Collaboration workspace:
: This 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 within the content repository. It enables administrators to limit the visibility of each workspace to groups of users. It also offers a visual simplification of complex content storage arrangements by only showing the structure that is appropriate for users to interact with.

More specifically, a drive consists of:

- A configured path where the user will start when browsing the drive.
- A set of allowed views that could, for example, limit the actions available to users (such as editing or creation of content within the drive).
- A set of permissions to limit the access to, and view of, the drive to a defined number of users.
- 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.

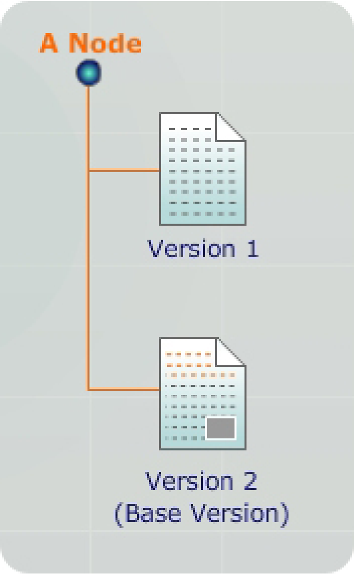
A node can be defined as a logical placeholder for data. It is a memory block which contains some data units, and optionally a reference to some other data (which may in turn be another node that contains other data). By linking one node with other interlinked nodes, very large and complex data structures 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. The action of saving is 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 non-versionable node.

A version exists as a part of a version history graph that describes the predecessor/successor relations among versions of a particular versionable nodes.



Software versioning is the process of assigning either unique names or version numbers to unique states of the software. Within a given version number category (*major* or *minor*, for example), 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 **D**istributed **A**uthoring and **V**ersioning. It is a set of extensions to the Hypertext Transfer Protocol (HTTP) which allows users to collaboratively edit and manage files on remote servers.

The protocol was developed 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 authoring the documents which a web server serves, among other things, 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 the words: *iPod* and *broadcast*.

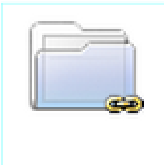
2.4.8. File Plan

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

A *symlink* is a special file containing a reference to another document or folder. Symlinks can make it easier to access the specific target node that the symlink points to. In Content Explorer, a symlink can be identified by a small chain symbol next to its icon:



Documents.lnk

Get Started

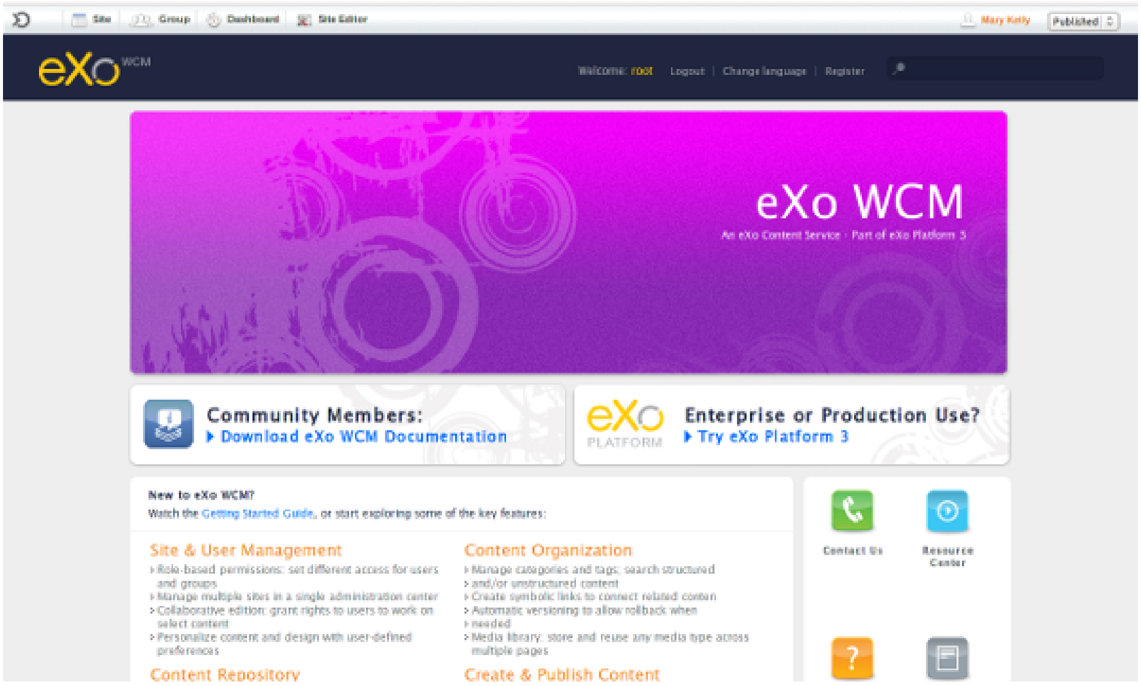
3.1. Account

3.1.1. Register an account

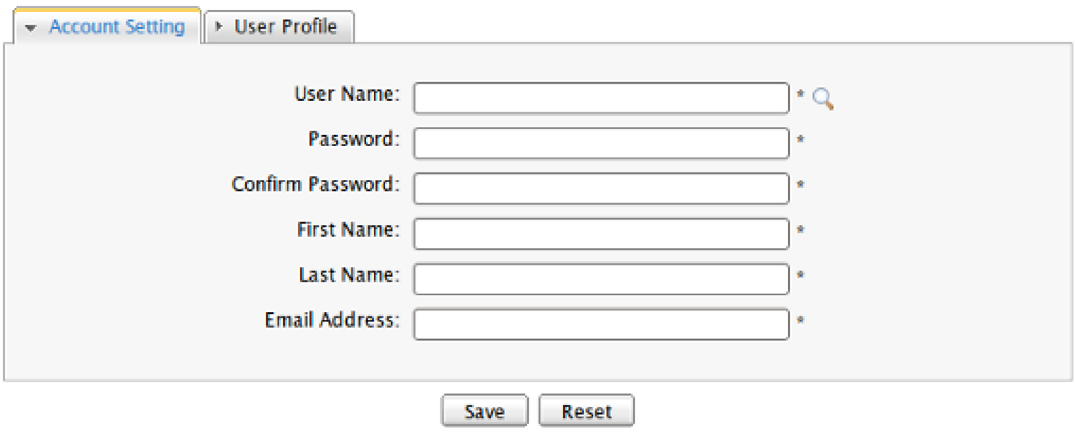
To register a new account on the portal, do as follows:

1. Go to the portal by entering 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:



   An asterix (*) indicates a required field.

The **Account Setting** information includes:

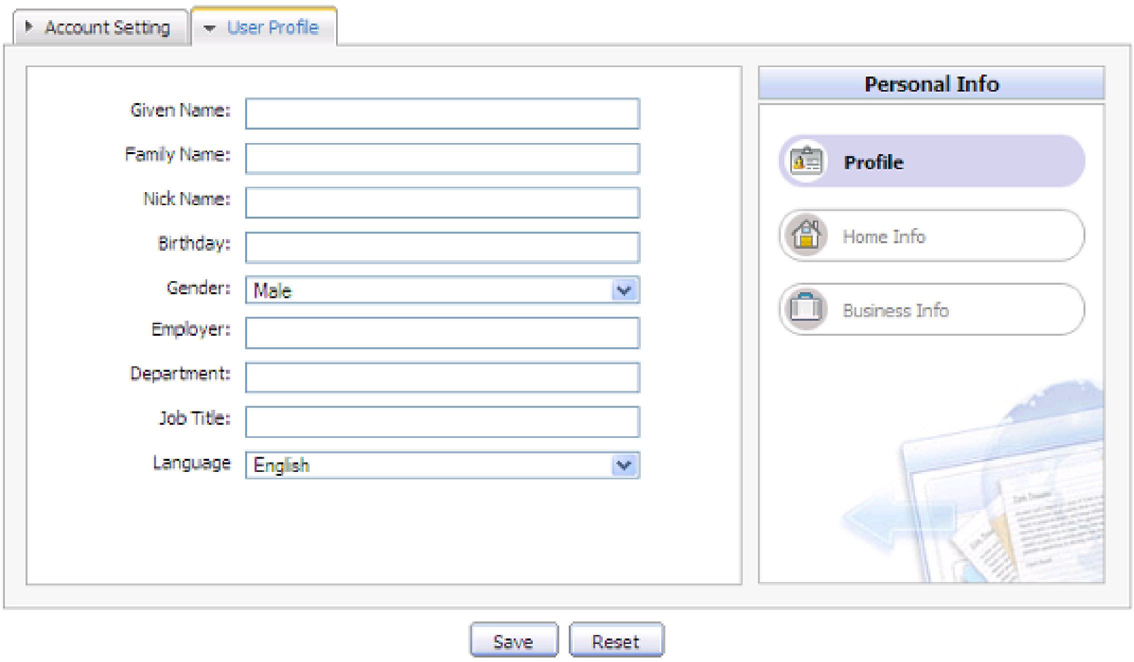
Table 3.1.

Field	Information
User Name	The user name that is used to log into the system. It must be unique. The user name must begin 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 the Password field and this field must be the same.
First Name	Your first name.
Last Name	Your last name.
Email Address	Your email address. It must have a right format: `username@abc.com`.

3. Enter the appropriate values for the fields in this form.

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

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



6. Click **Save** to register a new account, or **Reset** to revert all completed fields.

You will see an alert message and be unable to add a new account if any of the following occurs:

- The **User name** already exists or is invalid.
- The **Password** has less than six (6) or more than thirty 30 characters.
- The **Password** and **Confirm Password** are not the same.
- The **Email Address** is in an invalid format.
- Any of the required fields are empty.

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

> **Email**
>
> Ensure you enter your email address correctly at this stage, as it is used in the recovery process if you forget username or password.

3.1.2. Sign In

This function logs you into eXo Content in the private mode.

Procedure 3.1. Sign in

1. Go to your portal's home page by entering 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:

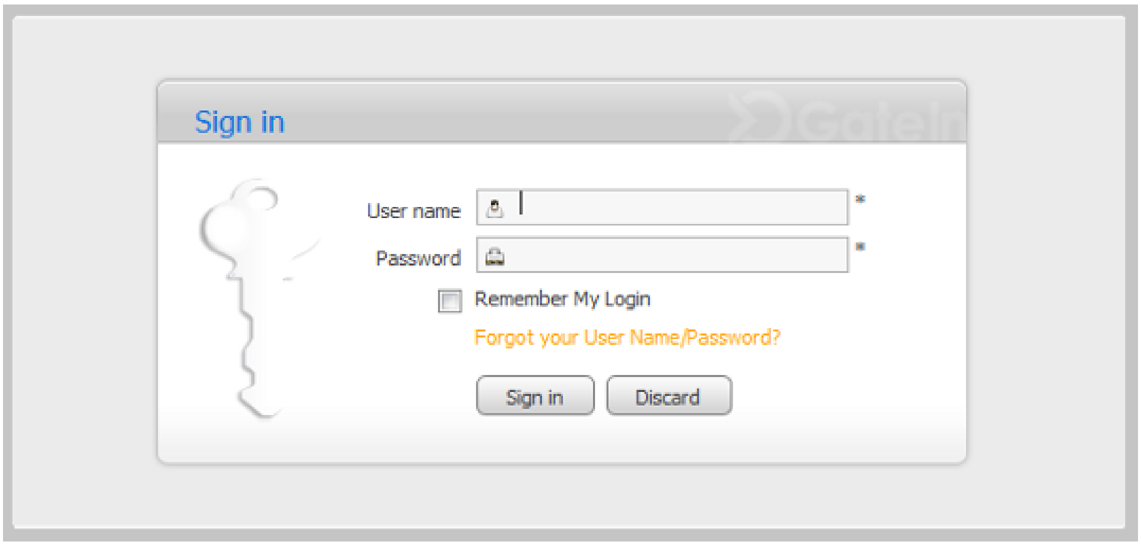


Table 3.2. Options

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.

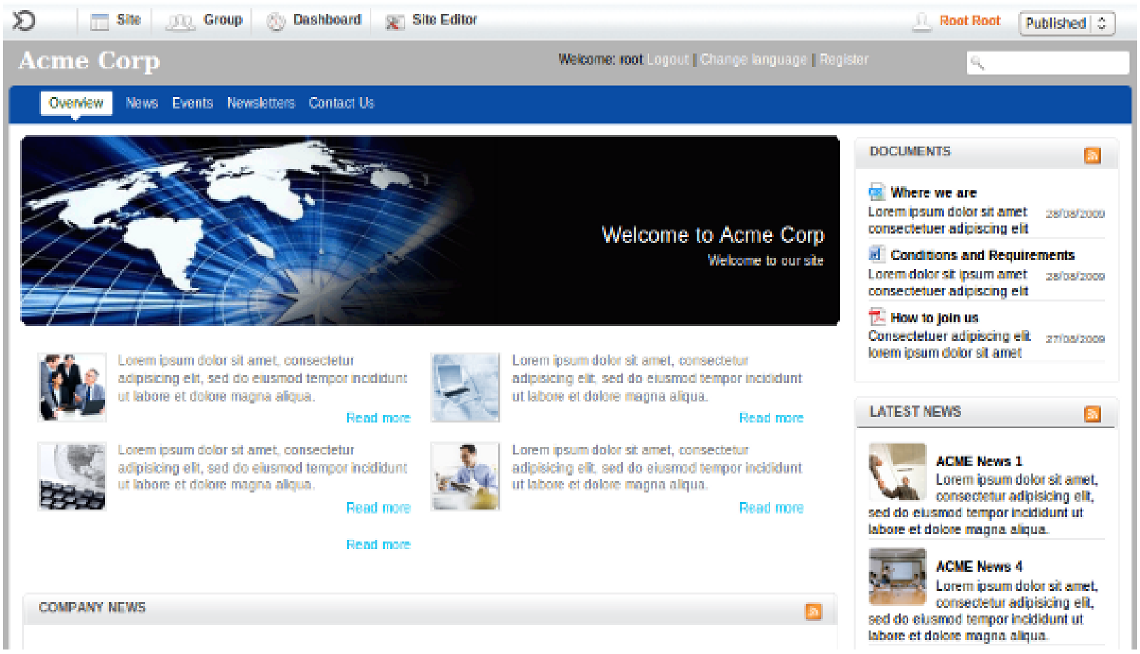
3. Enter your registered User name and Password.

4. Click **Sign in** to submit your details or **Discard** to exit the form.

   If the User Name does not exist or the submitted User name/Password set is invalid, an alert message will appear that requires users to re-submit the correct values. The page will be redirected to the private security checking mode.

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

After signing in, you will be presented with the authenticated homepage:



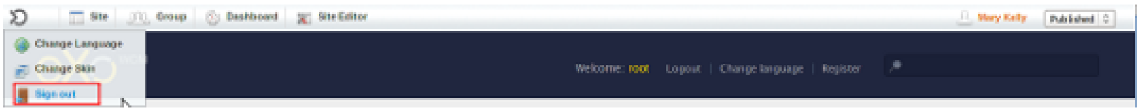
> **Toolbar Visibility**
>
> The toolbar in the image above is, by default, only visible to members of the */platform/web-contributors* role.
>
> See *Section 3.1.6, “Toolbar Visibility”* for information about how to add the required permissions and/or change the default portal behavior.

3.1.3. Sign Out

The function ends your authenticated session and redirects you back to the anonymous portal.

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

Alternatively, members of the */platform/web-contributors* role can click **Start Logo** → **Sign Out** from the toolbar:

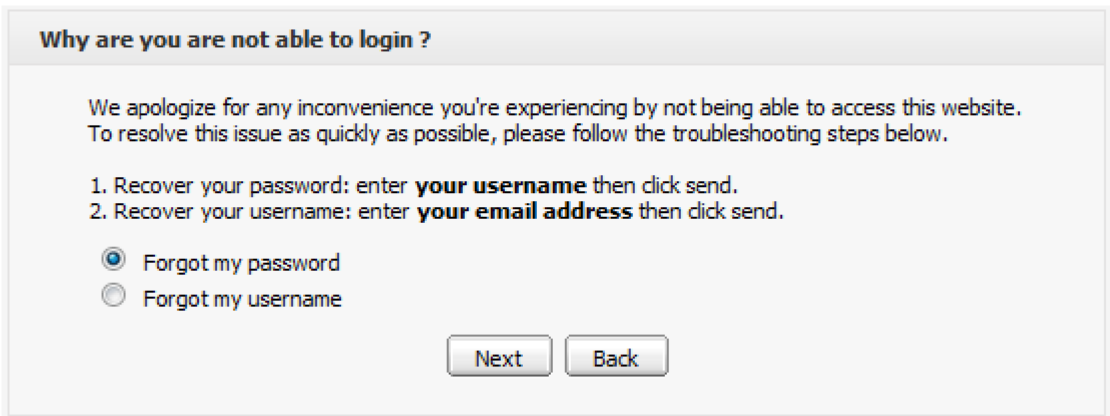


3.1.4. Retrieve user name/password

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

Procedure 3.2.

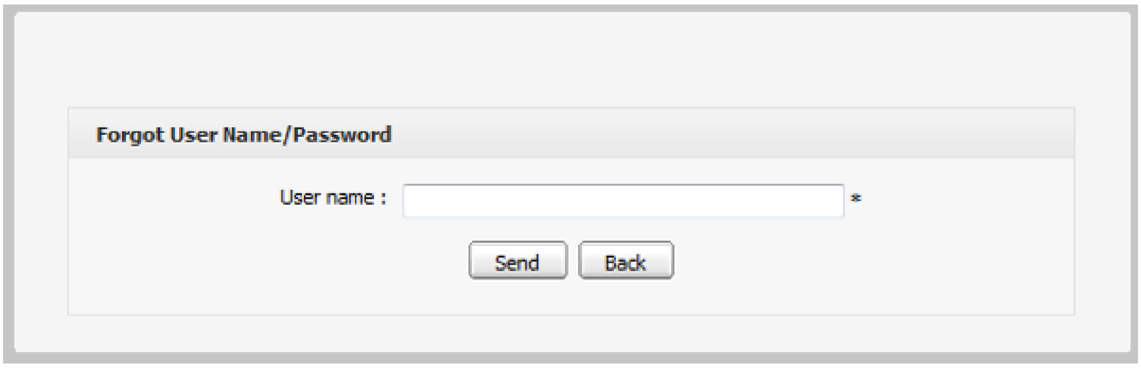
1. Click the link **Forgot your User Name/Password?** in the **Sign in** form.
2. Select one of the two options:



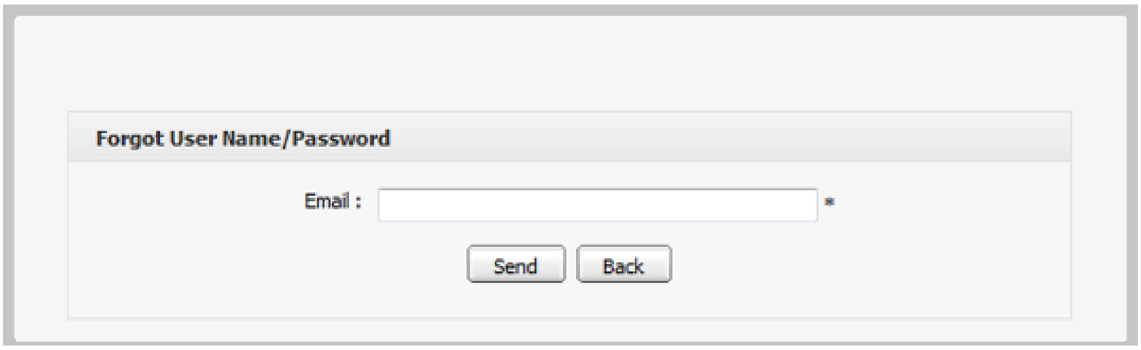
Forgot my password:
If you forgot your password, you need to select this option.

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

3. If the **Forgot my password** option is selected the password recovery form appears:



If the **Forgot my username** option is selected, the username recovery form appears:



4. Enter either your username or email address, as appropriate, in the corresponding form.

5. Click **Send** to submit the recovery request.

   Once the request has been sent, you will receive an email with the requested information, (either your `User name` or `Password` at the email address that you registered.

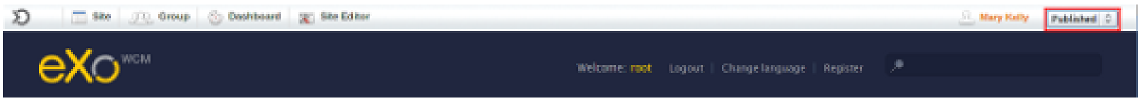
   - If you forget you username, an old username is restored and can be reused. A new password will be sent to your email with the old username.
   - If you forget your password: a new, temporary password will be set and sent to you. You will be directed to change the password the next time you sign in.

3.1.5. Change account information

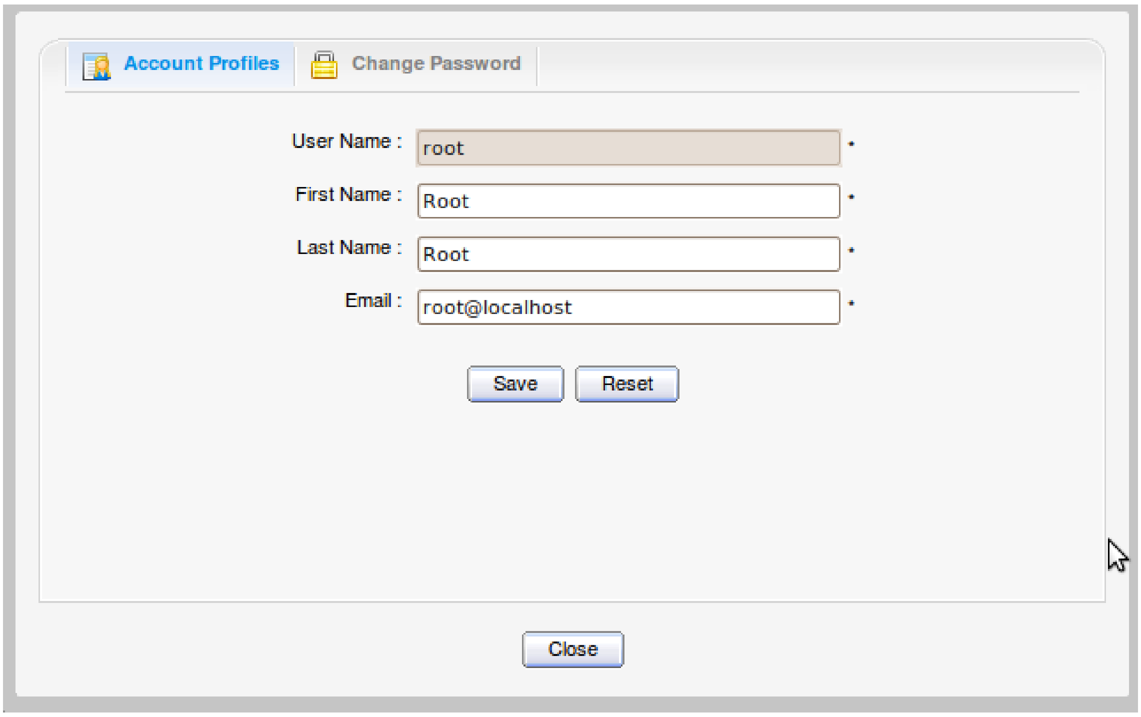
The function enables you change your account information, such as your profile and password.

Procedure 3.3.

- To begin, click your username name in the top toolbar.



The **Account Profiles** form will appear:



Procedure 3.4. To Change Account Profiles

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

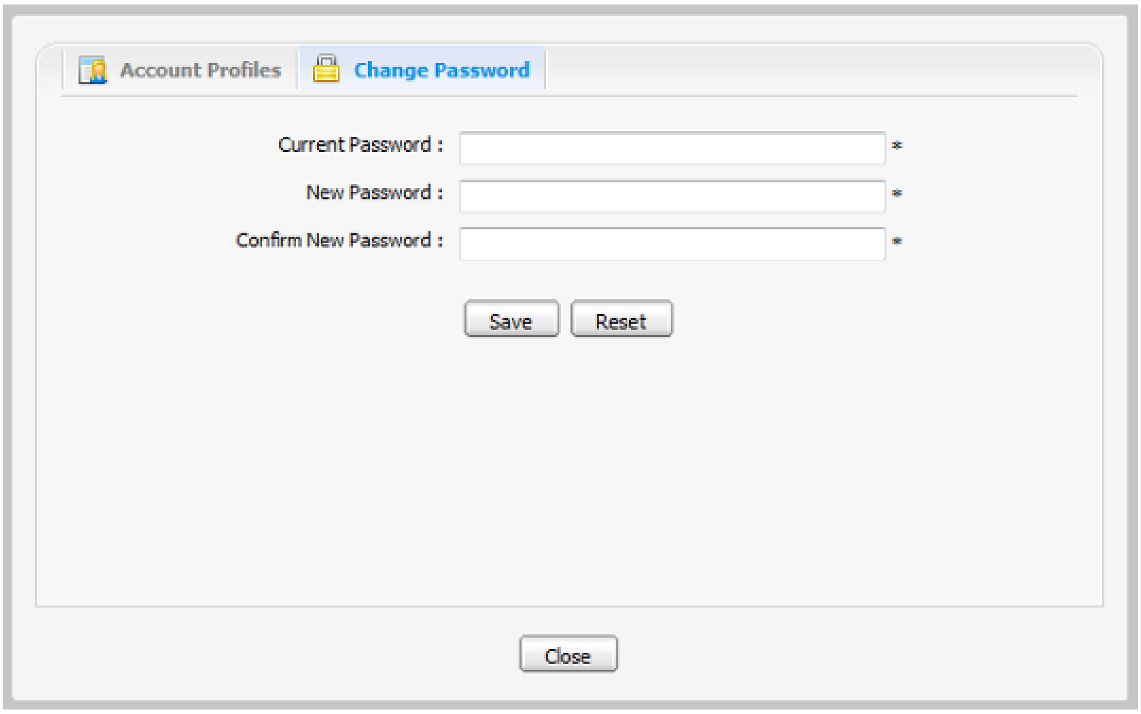
   This tab displays your current basic information.

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

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

Procedure 3.5. To change your Password

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



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

3. Enter your new password. The new password must be between six (6) and thirty (30) characters long.

4. Enter the new password again in the **Confirm New Password** field.

5. Click **Save** to submit the changes.

3.1.6. Toolbar Visibility

Newly registered users (or other users who are not members of the */platform/web-contributors* role) will not see the toolbar at the top of the home page. These users will, however, be able to sign into and out of the Portal using the appropriate buttons in the site header.

Portal administrators can add individual users to the */platform/web-contributors* through the graphical user interface (GUI):

Procedure 3.6. Add Permission via GUI

1. Click **Group** → **Organization** → **Users and groups management**, then click **Group Management**.

2. Click **Platform** → **Content Manager** in the left pane.

3. Enter the required username in the **Add member** box (the above lists all users already in that role).

> **CMS Access**
>
> Be aware that granting this membership will also give the user access to the Content Management System (CMS).

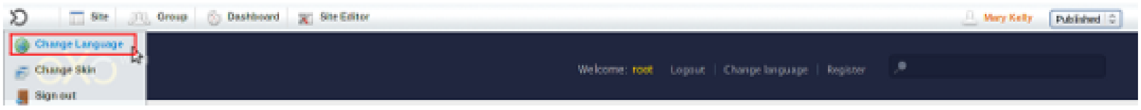
3.2. Change the display language

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

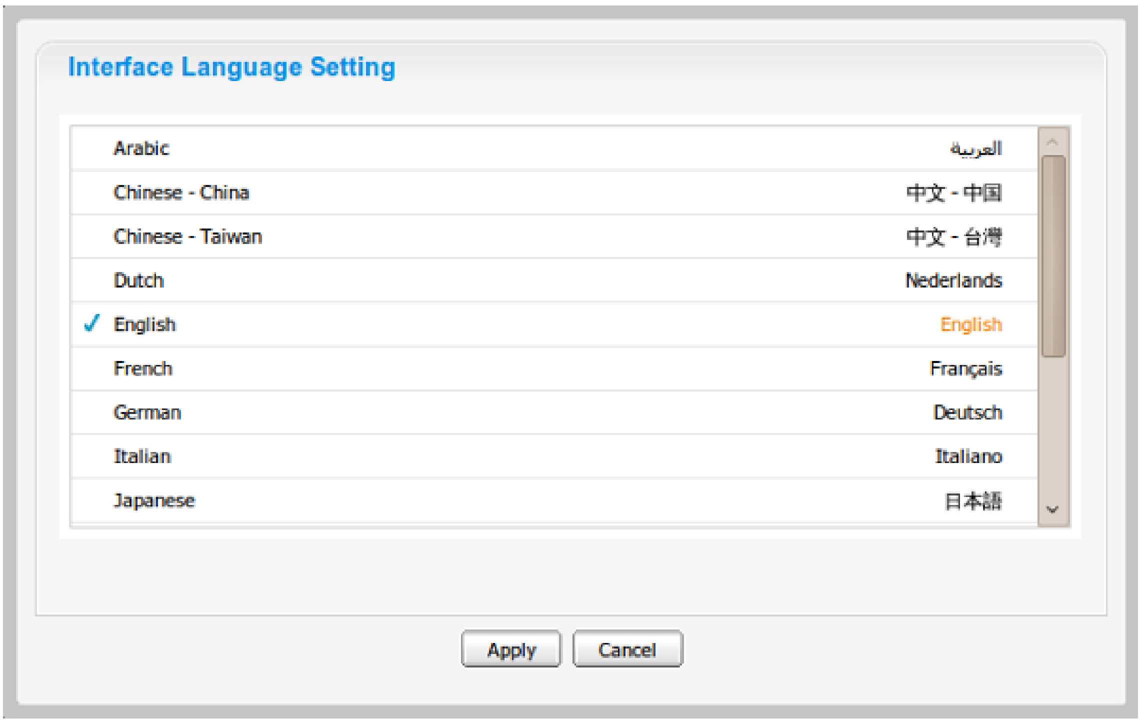
1. User's language
2. Browser's language
3. Portal's language.

Therefore, to display your preferred language, you should be attentive to this order to change the language type appropriately.

1. Move the mouse over **Start Logo** → **Change Language** on the top left corner of the portal:



   The **Interface Language Setting** form appears:



2. Select another language from the list. The currently selected language will be marked with the ✓ icon.

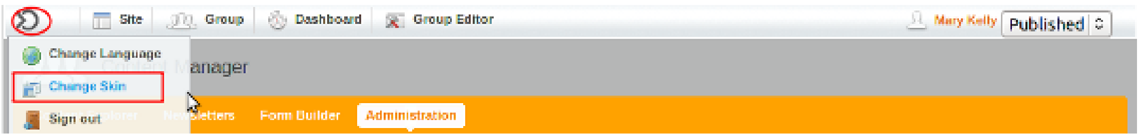
3. Click **Apply** to change the display language temporarily, and wait few seconds to take effect, or click **Cancel** to quit without any changes.

3.3. Change the skin of the current site

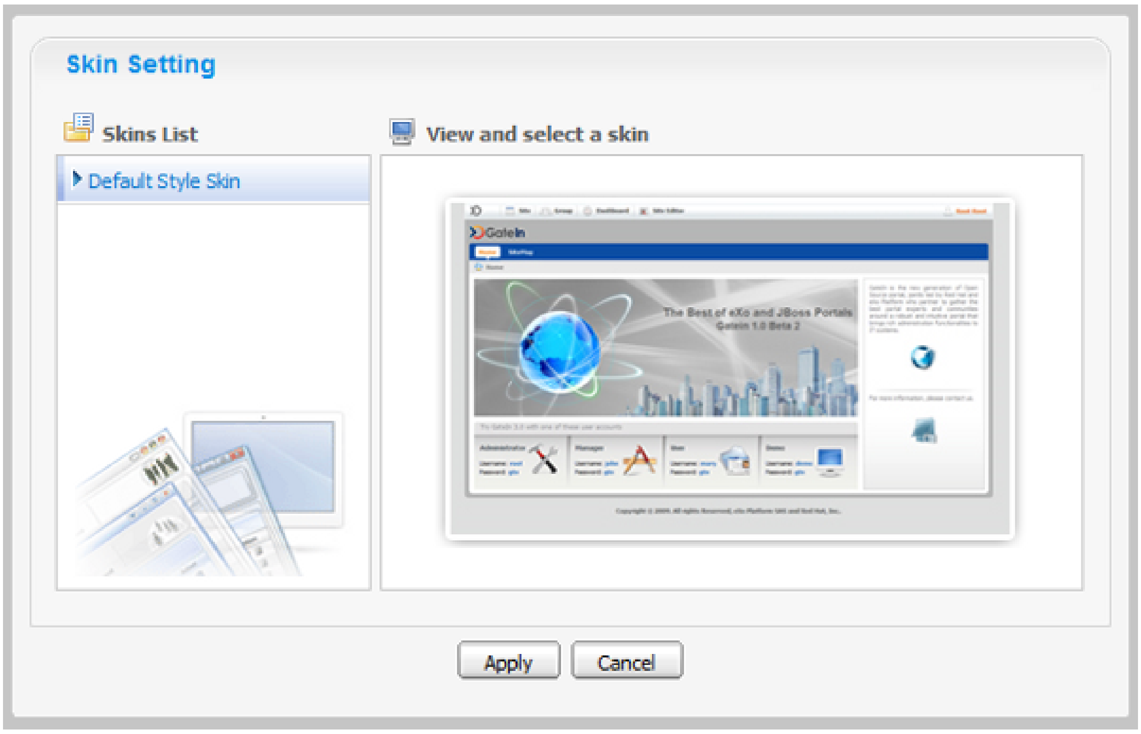
Skins are attractive user interface styles for displaying a portal. Each skin has its own characteristics with different backgrounds, icons and more. Changing the skin of the current site can make use of the portal easier and more effective.

Procedure 3.7.

1. Hover the mouse pointer over the **Start Logo** then click on the **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.

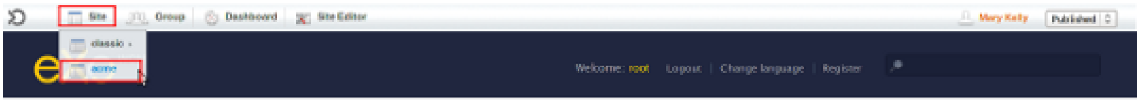
This action can be performed by users who have the right to use the administration bar with a personal preferences menu.

Basic Actions

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

4.1. View a site

In eXo Content, the term **Website** is used interchangeably with the term **Portal**. So, "*Viewing a portal...*" means the same as "*Viewing a website...*". You can select the website that you want to view by selecting its name in the drop-down menu on the administration bar:



The main screen of the site will appear. The illustration below highlights some important components of the web page:

1. The **Administration bar** contains administration functions related to portals (websites).

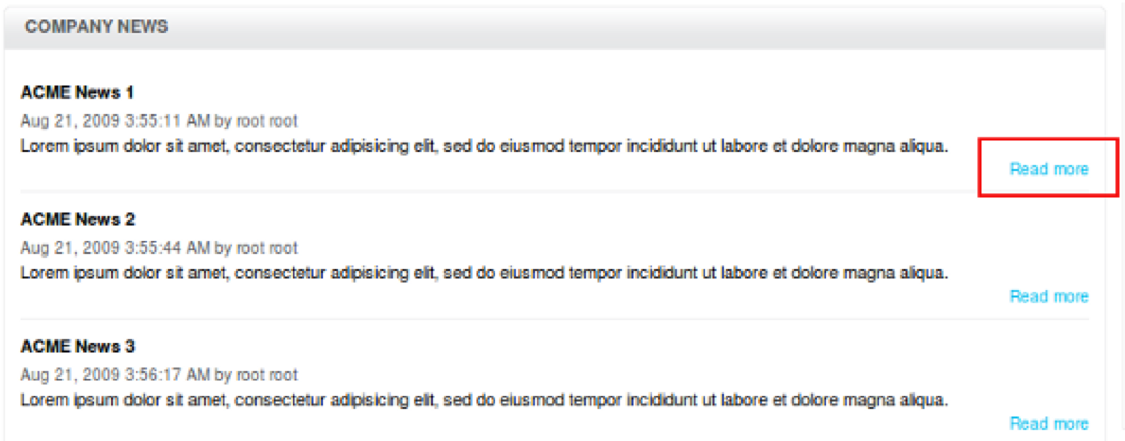
2. The **Banner** portlet contains things like the company name and logo used throughout the website.
3. The **Navigation bar** helps users to visualize the structure of the website and provide quick links to different pages.
4. The **Home page** is the main page of the website. This is the default page that is displayed first when you visit the website.
5. The **Footer** is any texts, or image that is displayed at the bottom of the website. It provides information about author/institutional sponsor, revision date, copyright and more.

4.2. Print content

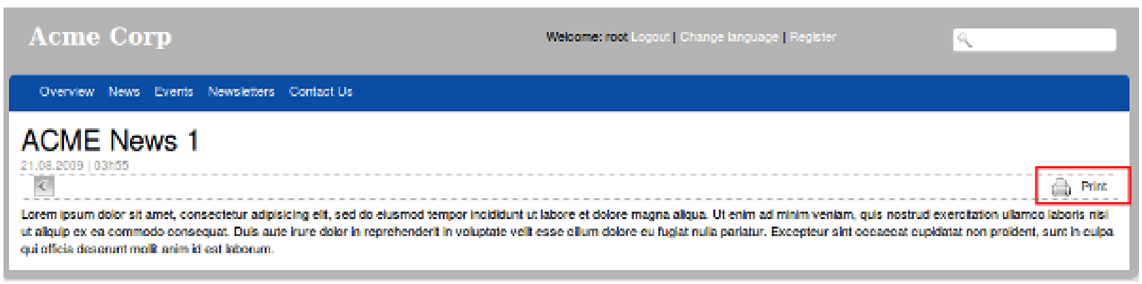
Users can easily print any content in a site by following these steps:

Procedure 4.1. Printing content

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. Manage a site

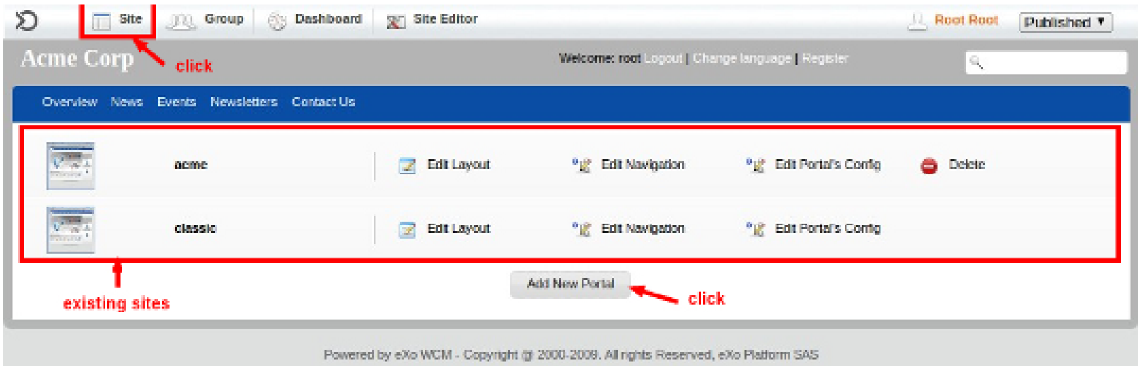
4.3.1. Create a new site

> **Note**
>
> Only administrators have the authorization rights required to create a new site in eXo Content.

eXo Content administrators can create a site (portal) to meet their specific needs.

Do the following:

1. Click **Site** on the administration bar to see a list of existing portals.



2. Click the **Add New Portal** button to open the form to add a new portal.

   In the **Portal Setting** tab, set some properties for this site including the portal name, locale and skin.

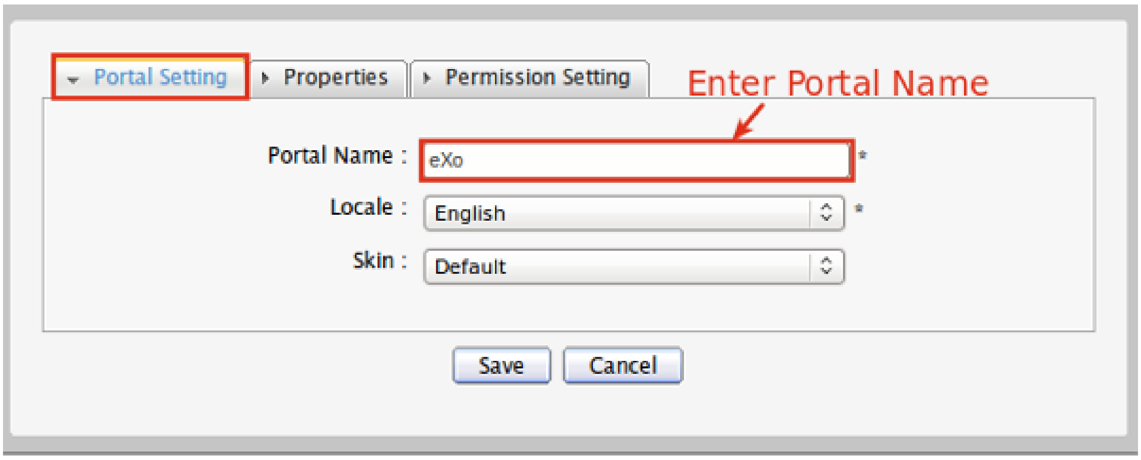


Table 4.1. Details:

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.

Field	Information
Locale	The interface language of the portal. This field is required.
Skin	The skin of the portal.

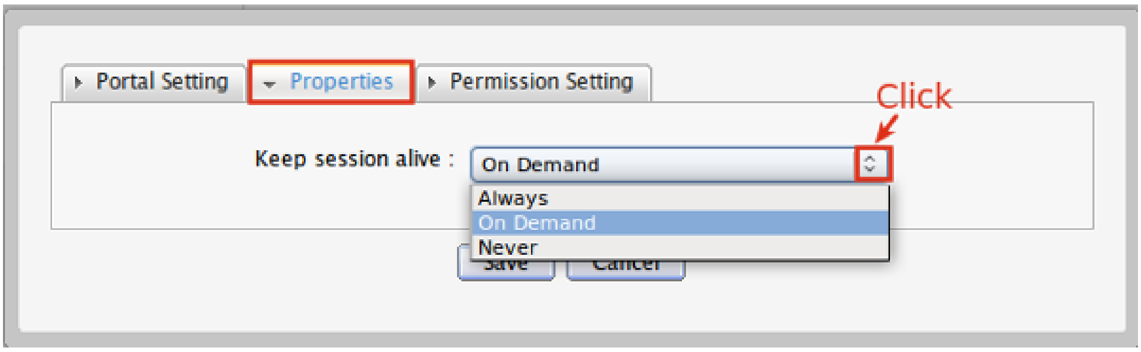
3. Select the **Properties** tab to keep sessions alive.

   The **Keep session alive** option defines the working session so as to avoid timeouts. There are three options available:

   never:
   : The session never happens even if the application requests.

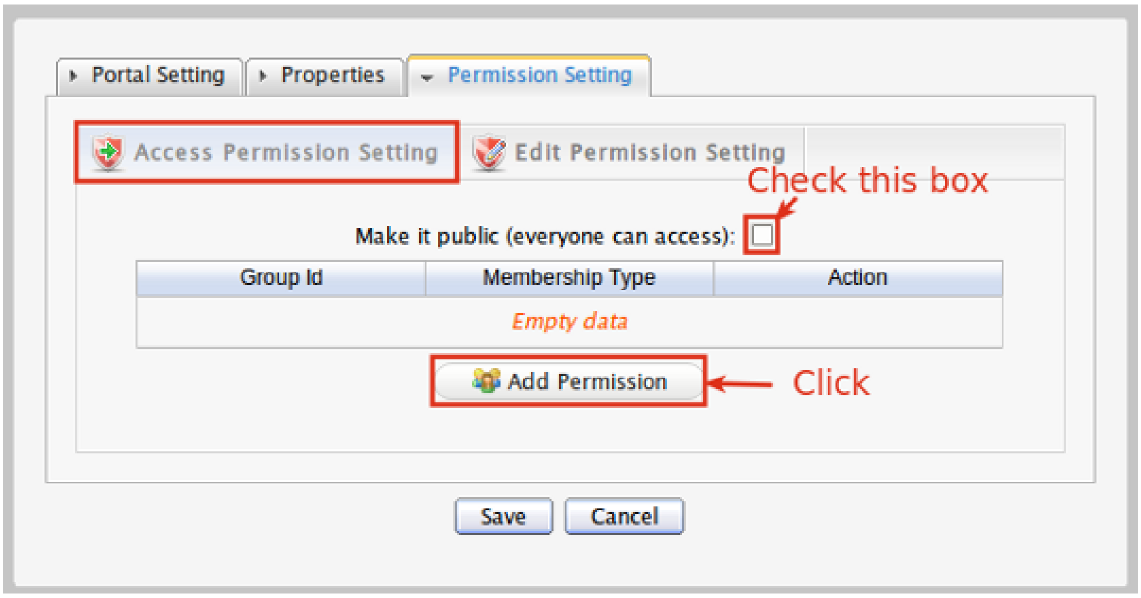
   on demand:
   : The session starts to be used as soon as the application requests.

   always:
   : The session is always enabled.



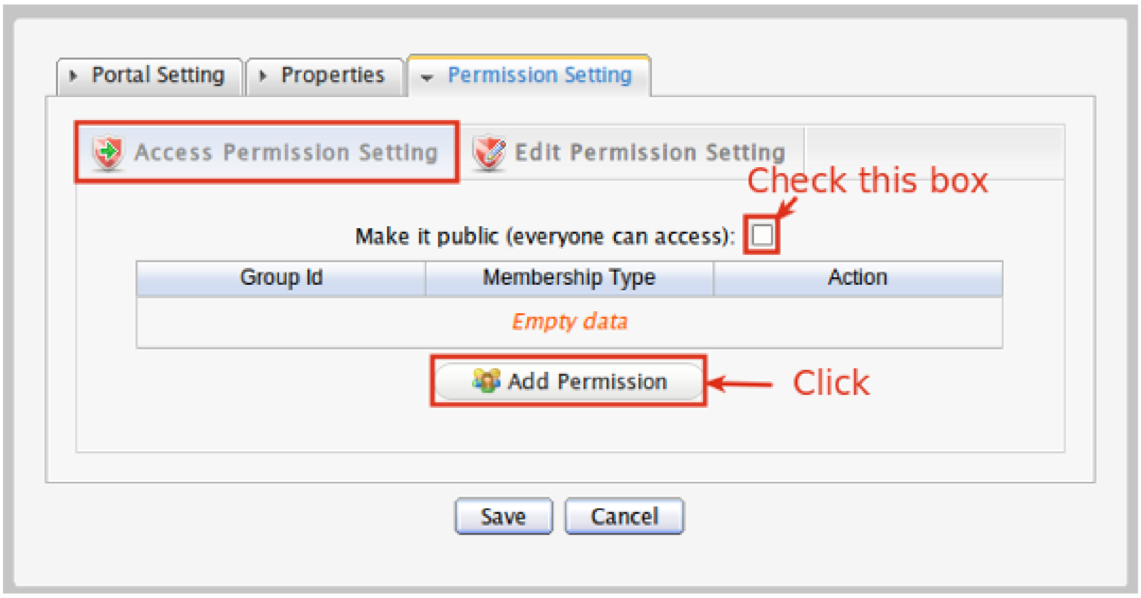
4. Select the **Permission Setting** tab to set access and edit permission for this portal.

   The **Permission Setting** tab includes two sub-tabs: **Access Permission Setting** and **Edit Permission Setting**.



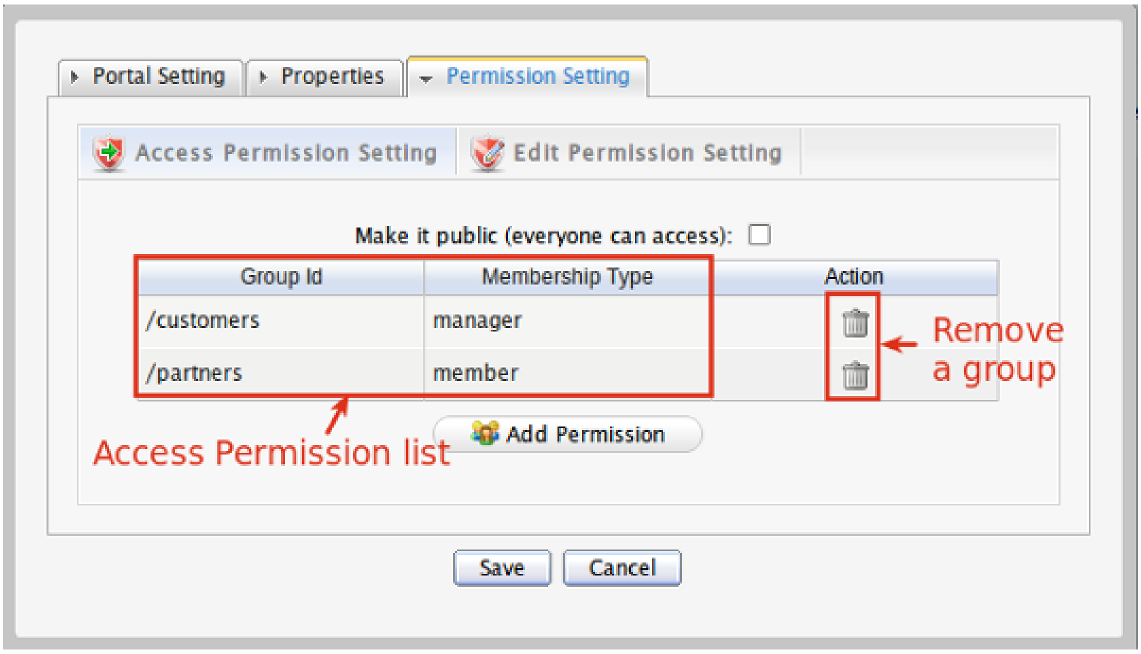
Access Permission Setting tab

The access permission list of the portal is empty by default:



Check the **Make it public** check box to assign the access permission to everyone or click the **Add Permission** button to assign access permissions to a specific group (select the group you want to grant permission to from the **Select Permissions** form by selecting a group on the left and a corresponding membership on the right).

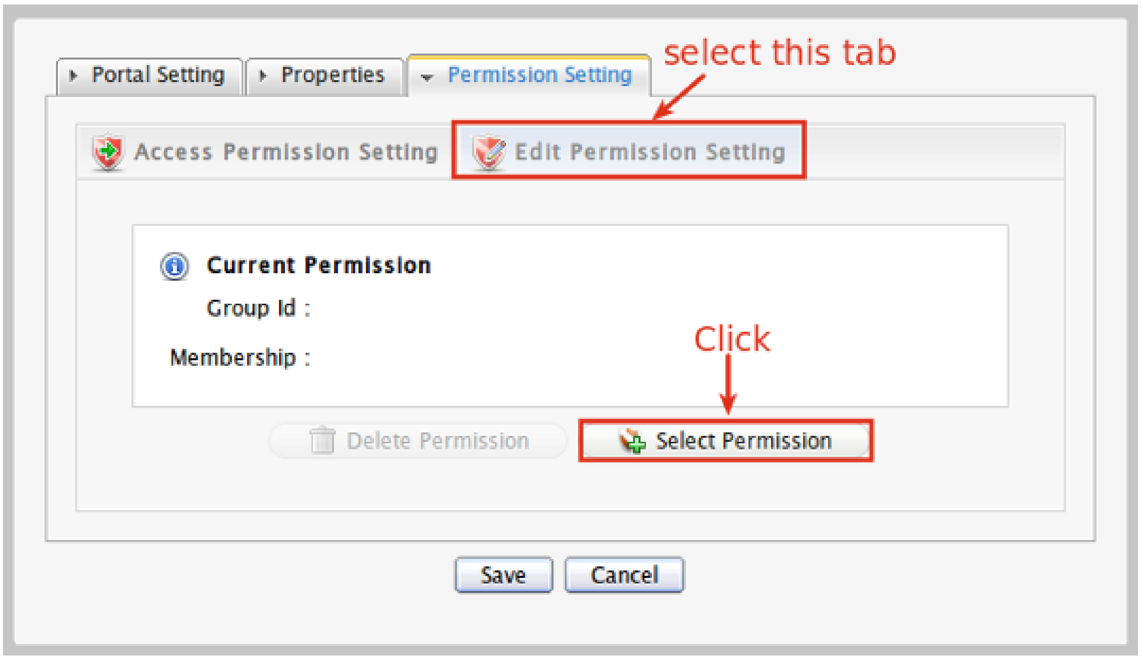
Once the desired groups have been selected the access permission list is displayed:



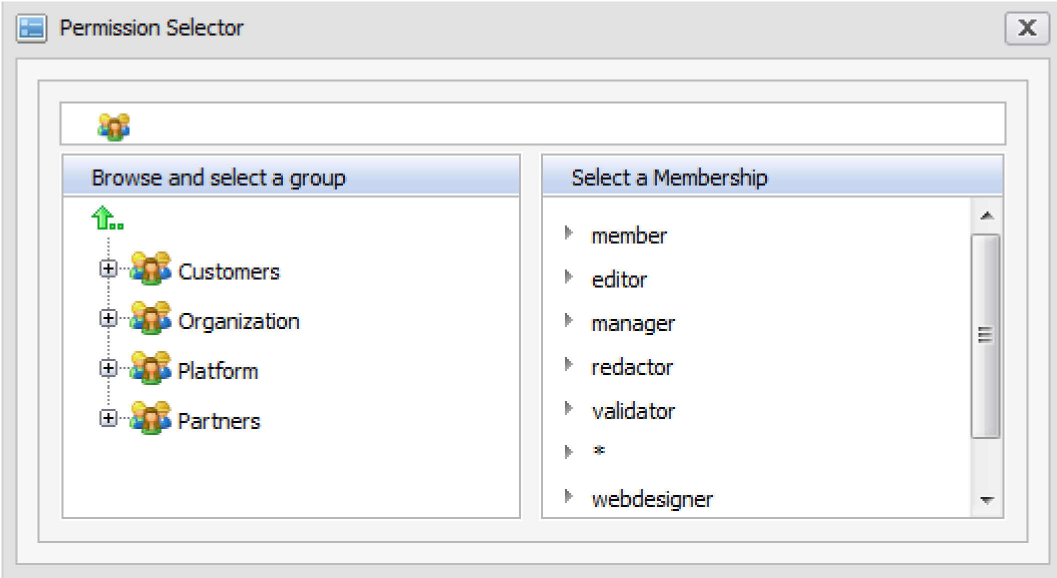
Groups can be removed from the **Access Permission** list by clicking the icon.

Edit Permission Setting

The **Edit Permission Setting** tab is also empty by default. You must assign the edit permission to a specific group.

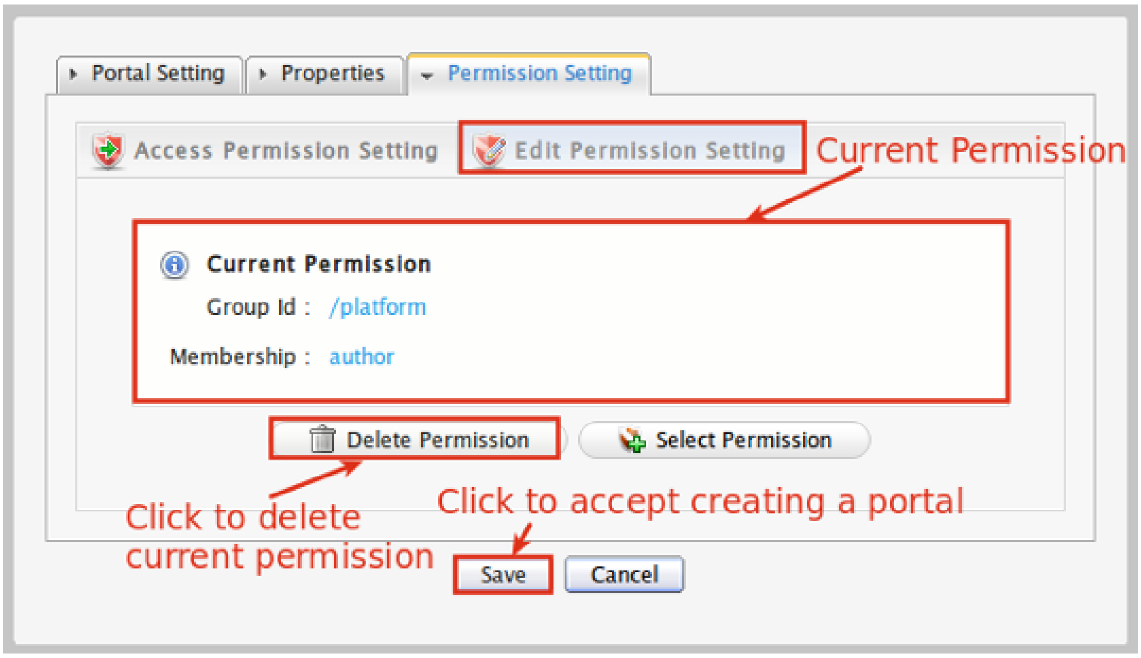


You can assign the edit permission to a group with a specific membership by clicking the **Select Permission** button to open the **Permission Selector** form. Select a group on the left panel and a corresponding membership on the right panel:



The asterix (*) in the **Select a Membership** panel is used to assign the right to everyone in the group selected in the left panel.

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



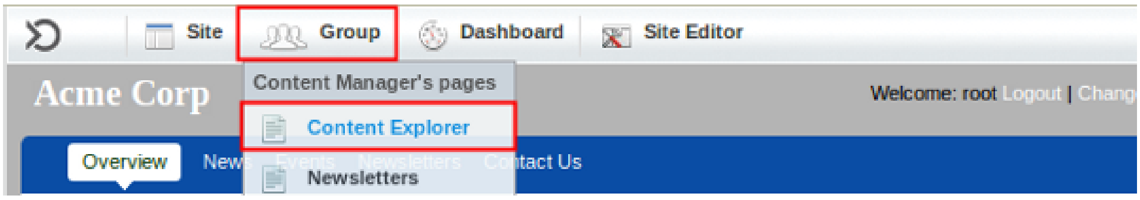
The edit permission is assigned for only one group at one time. You can click the **Delete Permission** button to remove the current edit permission of the selected group or re–assign the edit permission to another group by clicking the **Select Permission** button again and selecting another group.

5. Click **Save** to create the new portal.

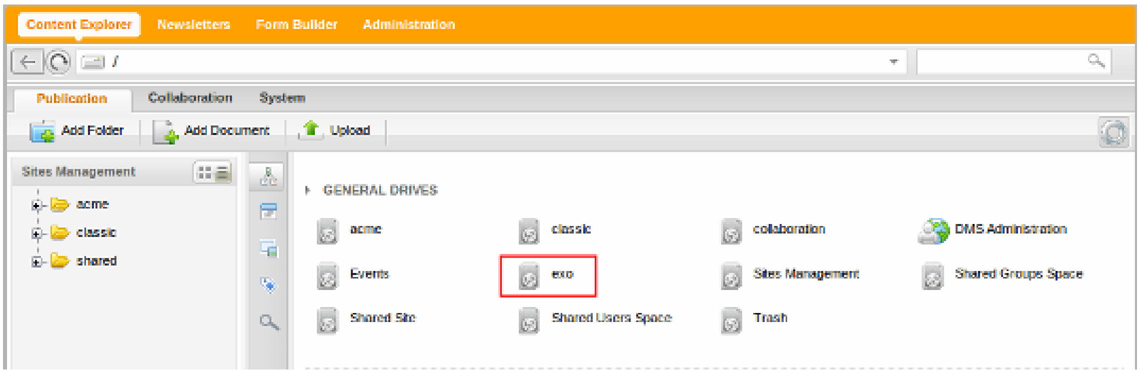
After creating a new site, the list of the existing sites will be displayed on the screen.

The new site will be added to the site list in **Site** on the administration bar and to a drive list that includes all its default files.

To see it in the drive list, 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**:



4.3.2. Edit a site

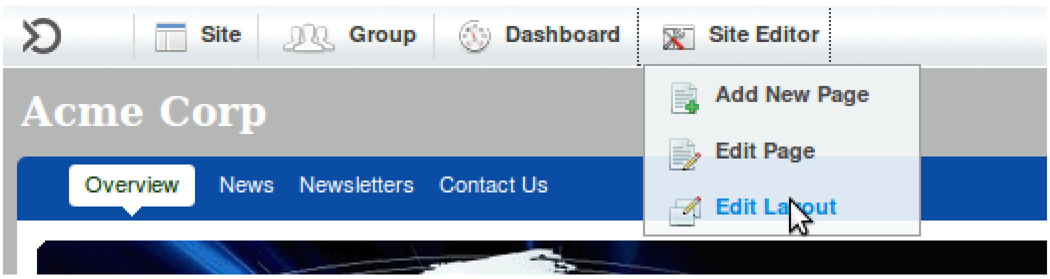
This function enables you to edit a site, including the settings, permissions and other configuration options as well as the navigation and the layout components.

There are two ways to approach a site that you want to edit:

1. Edit the site that you are browsing through the **Site Editor** menu on the administration bar.
2. Edit another site by accessing it through the **Sites** menu on the administration bar.

4.3.2.1. By accessing to Site Editor

Directly edit the site you are browsing by navigating to **Site Editor** → **Edit Layout**.



An editable layout of the site appears:

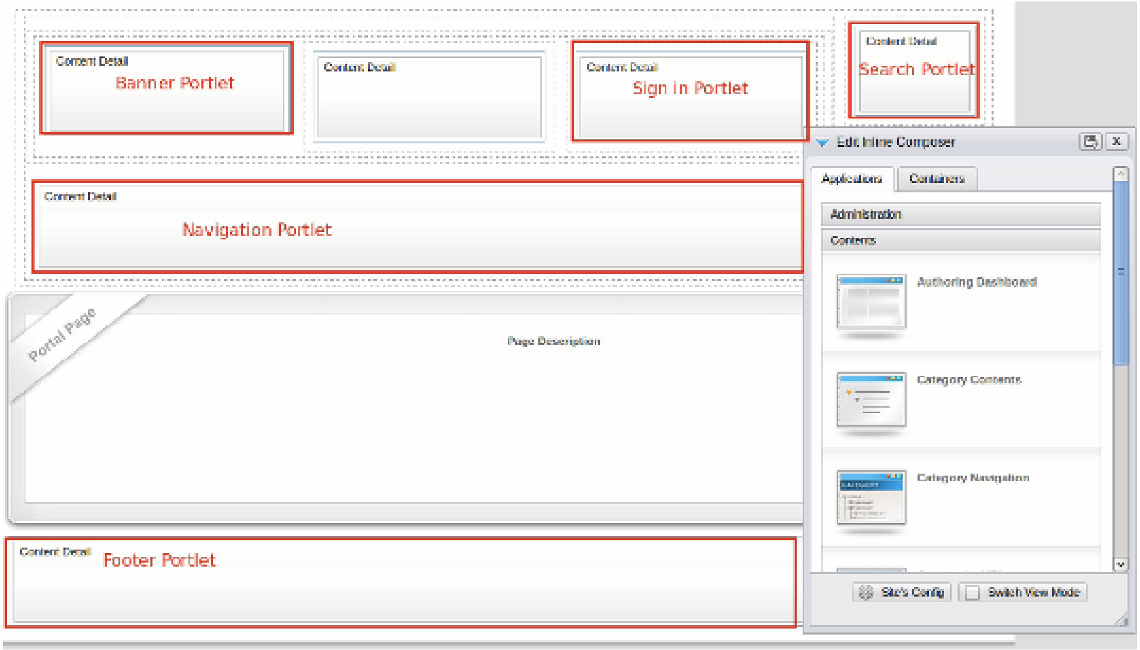


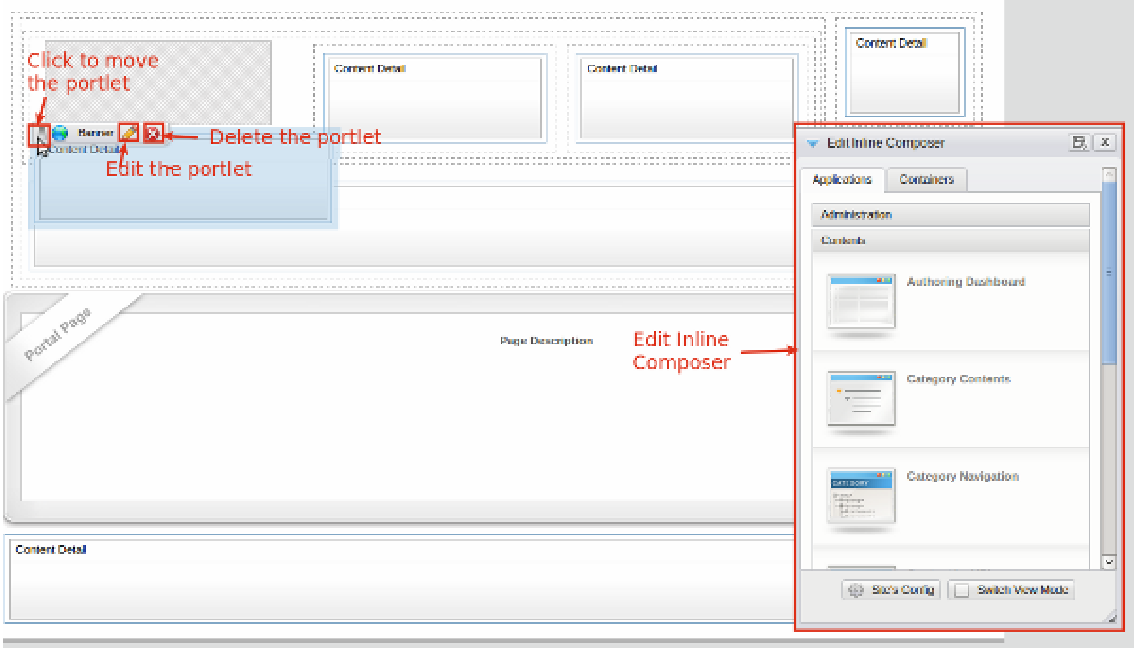
Table 4.2.

Field	Details
Site's config 	Allows editing the site's configuration.
Switch View Mode 	Displays a view of the current layout with content.
Finish 	Saves all changes and exits the Edit page.
Abort 	Cancels all changes that have not been saved and quits the edit page.

Using this method you can only edit the layout and the configuration of site.

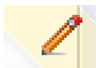
Edit layout. Editing the layout allows more aspects of a site, including the banner, navigation bar, breadcrumb bar, homepage or footer to be edited.

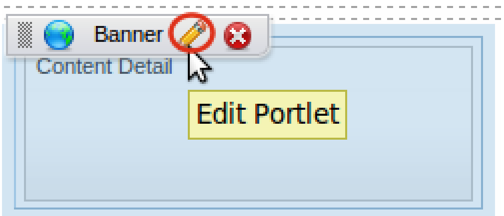
You can add more portlets to the site by dragging and dropping them from the **Applications** tab of the **Edit Inline Composer form** to the main pane. Portlets can also be moved within the main content pane by dragging them from one location to another.



> **Editing Portlets**
>
> The editing process is similar for all portlets, therefore this guide will outline how to edit the site banner portlet as an example.

Procedure 4.2. Edit Banner Portlet

1. Open the form to edit a banner by clicking the  icon of the portlet in the **Edit Portal** form:

   A form to edit the current banner will appear.

2. Select the **Edit Mode** tab: Select the content path and set options for the portlet. See more details about Edit Mode in *Section 4.4.2.4, “Preferences”*.

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

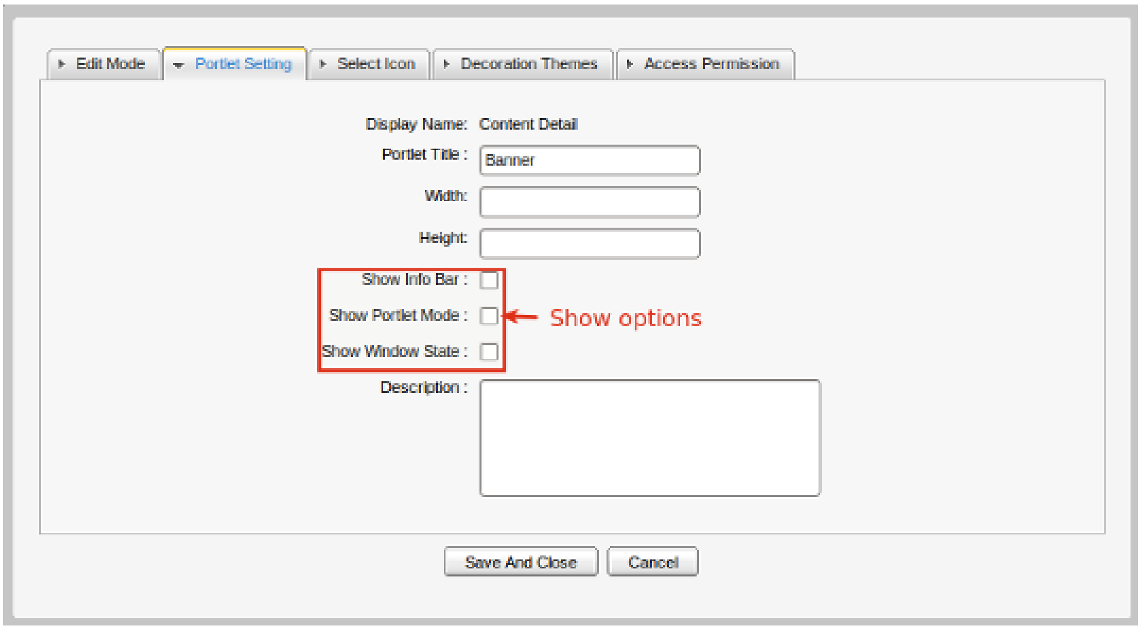


Table 4.3.

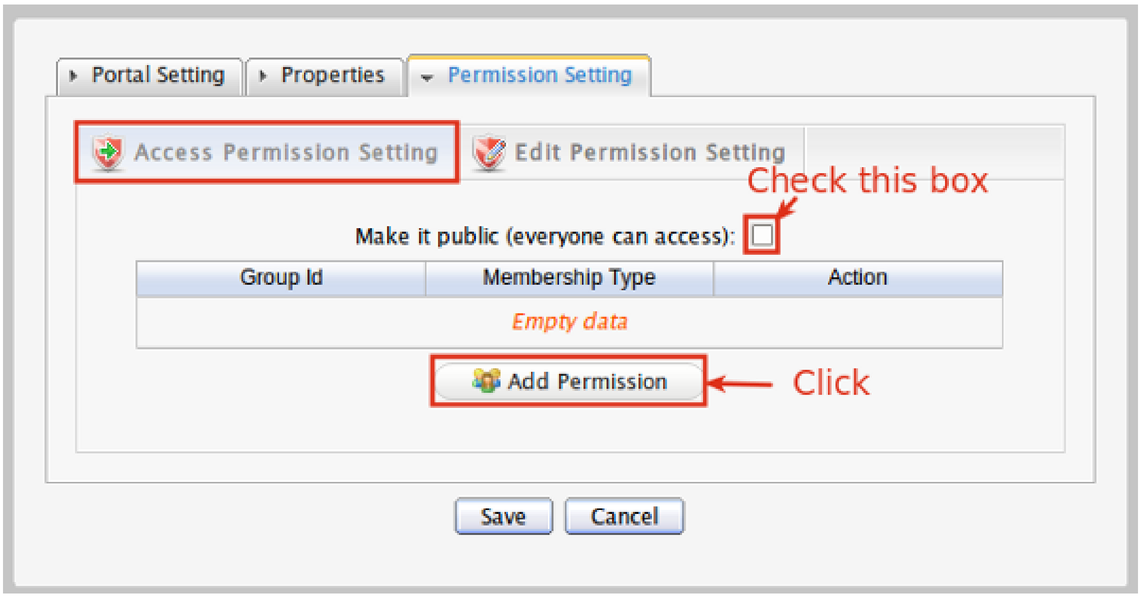
Field	Details
Display name	The display name of the portlet (not editable).
Portlet Title	The title of the portlet (editable).
Width	The display width of the portlet.
Height	The display height of the portlet.
Show info bar.	Tick the check box if you want to show the info bar of the portlet.
Show Portlet 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 a description about the portlet.

4. Switch to the **Icon** tab and designate an icon for the portlet by clicking it.

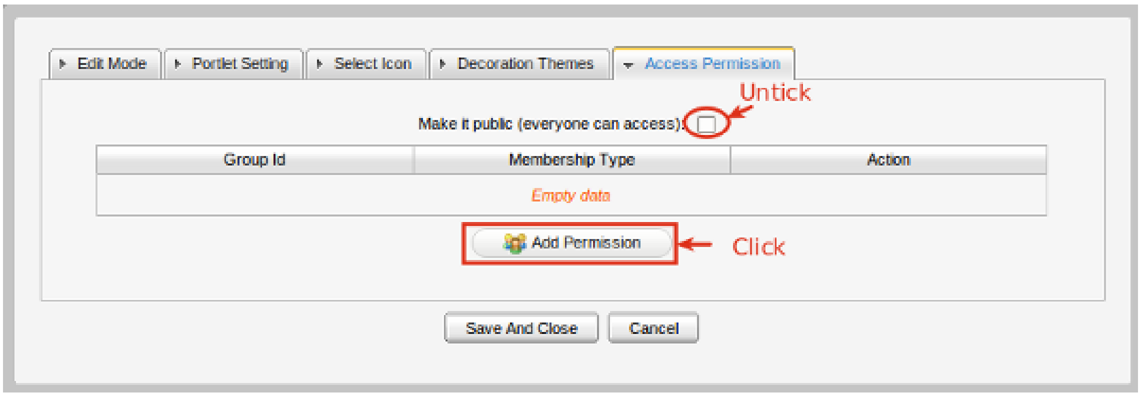
5. Switch to the **Decoration Theme** tab and chose a decoration theme for the portlet.

6. Select the **Access Permission** tab and set the access permissions for the portlet.

   By default, all users can access the portlet:



However, you can edit the access permission by clearing the checkbox and clicking **Add Permission**:



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

> **Note**
>
> The asterix (*) on the right pane denotes all members in the group.

7. Click **Save and Close** to commit.

8. Click the disk icon to quit the form to edit the current site.

Edit Configuration. To edit the configuration (including language, skin and permissions) of the site, click the 

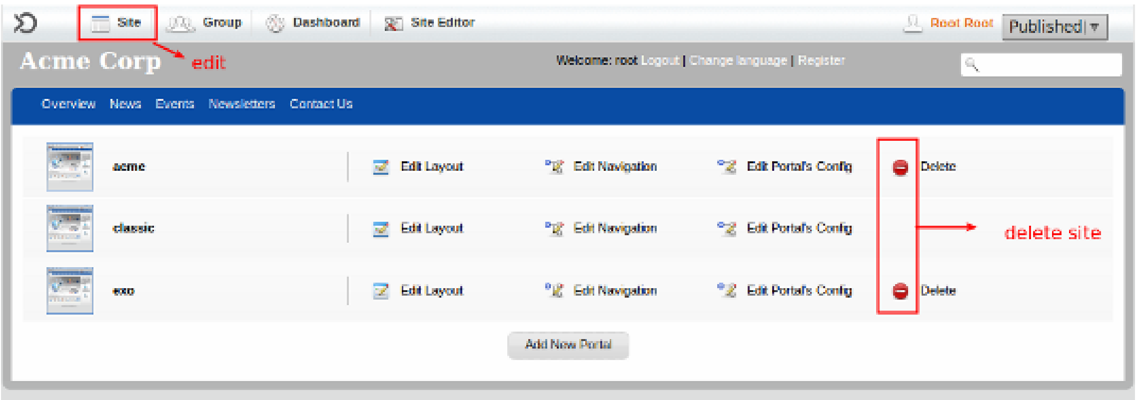
button to open the same form as the form to add a new portal. Follow the same steps as in *Section 4.3.1, “Create a new site”*.

Note

You cannot change the name of the site.

4.3.2.2. By accessing the Site

This approach way enables you to edit the layout, configuration and navigation bar of a site by going to **Sites** and selecting the site from the existing site list.

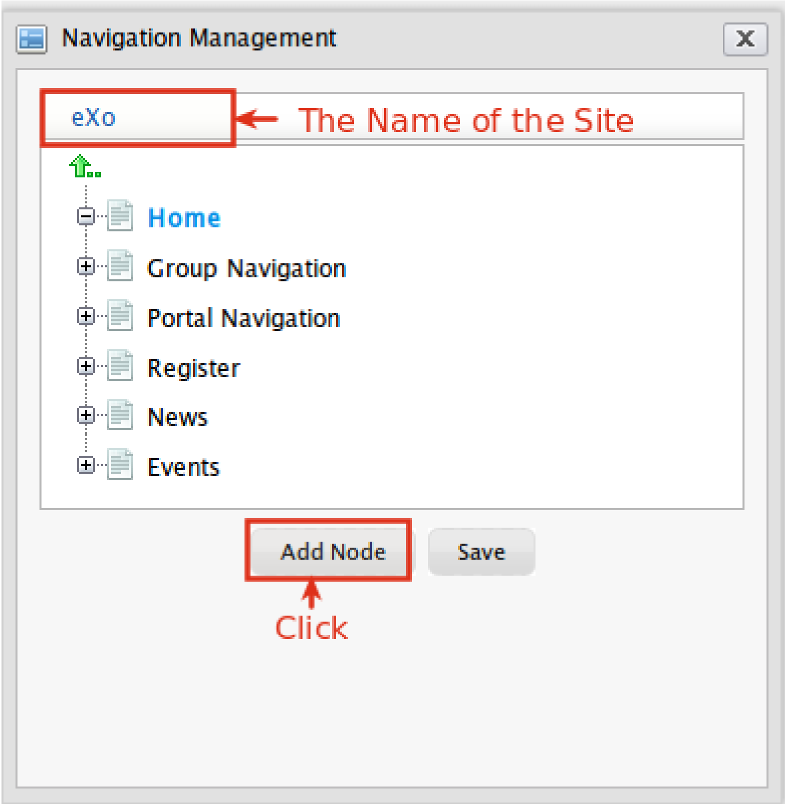


Edit Layout. Do the following to edit the layout of an existing site.

1. Click **Site** → **Edit Layout** to open a form to edit the site layout.
2. Follow the steps in the *Edit layout* process.

Edit Navigation. Do the following to edit the navigation of a 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. This is a required value.

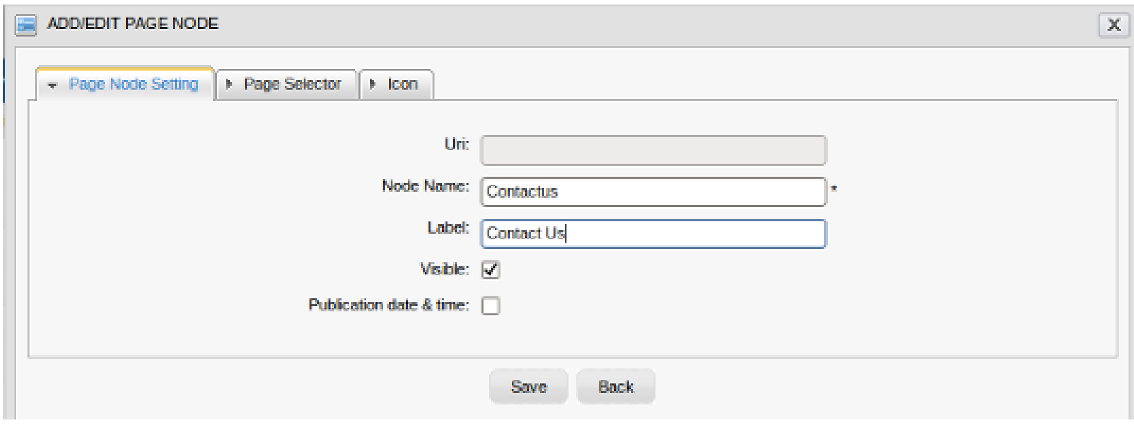


Table 4.4.

Field	Details
Uri	The node's identification. The Uri is automatically created once a new node has been created.

Field	Details
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 on 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:

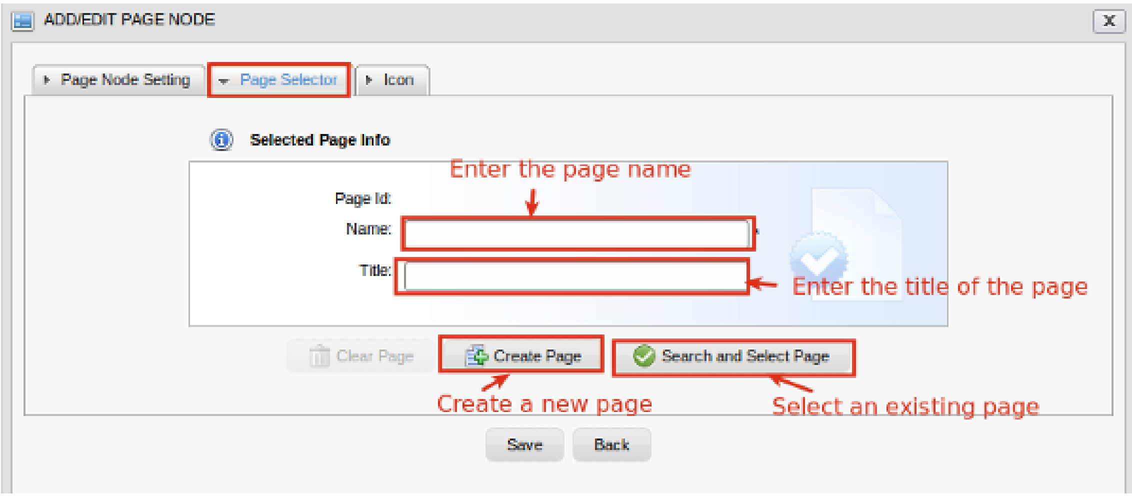


Table 4.5.

Field	Details
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 input page information in the fields

Field	Details
Create Page	To create a new page with the input name and the title.
Search and Select Page	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. This is optional.
6. Click **Save** to create a node for the navigation.

Editing via Navigation Management

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

Edit Configuration. The portal's configuration including language, skin and permissions can be edited by doing the following:

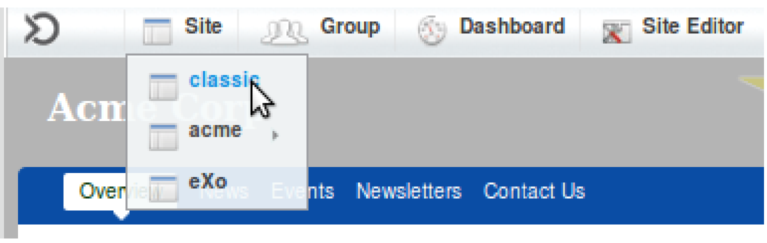
1. Click **Site** → **Edit Portal's Config** to open the same form as the form to create a site.
2. Follow the steps in *Section 4.3.1, "Create a new site"*.

4.3.3. Switch between sites

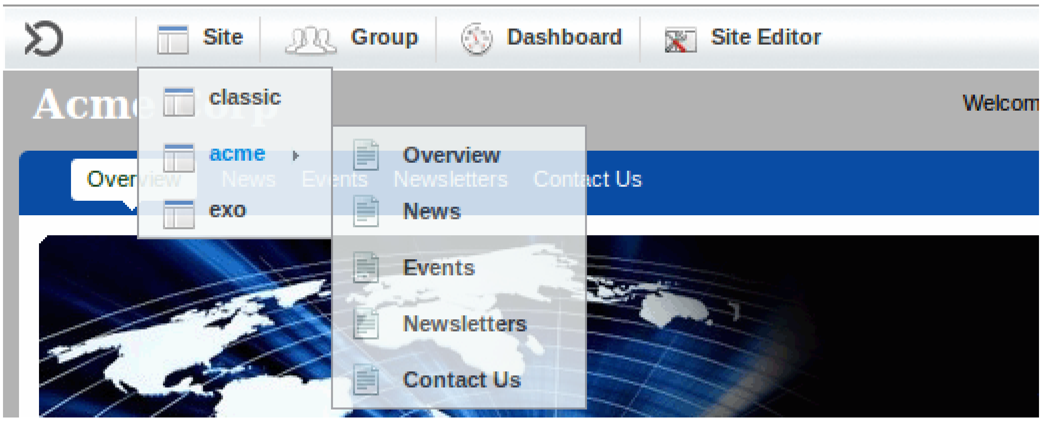
This function is used to move from the current web site to another one.

Procedure 4.3.

- Hover your mouse cursor over **Sites** on the administration bar and choose a new site from the site list that appears:



The child pages of the new site will now be available in the site's entry under **Site** on the administration bar:



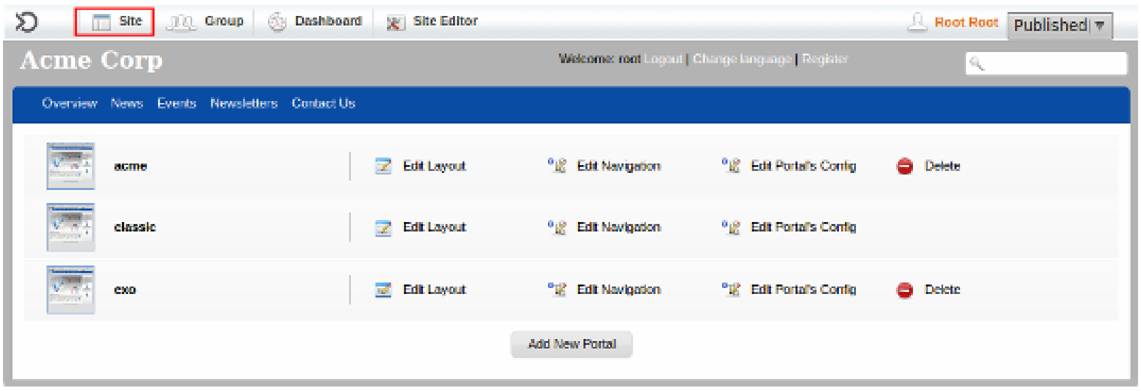
4.3.4. Delete a site

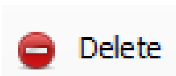
This function is used to delete a portal (site) from the portal list.

Do the following:

Procedure 4.4.

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



2. Click the  button in the row of the portal that you want to delete.

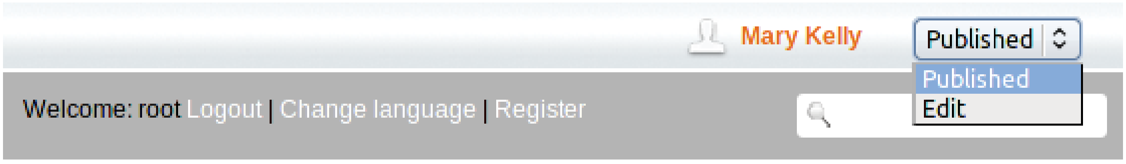
3. Click **OK** in the confirmation message to accept deleting.

> **Note**
>
> You cannot delete the **Classic** site by default.

4.4. Contribute Content

4.4.1. Edit Mode

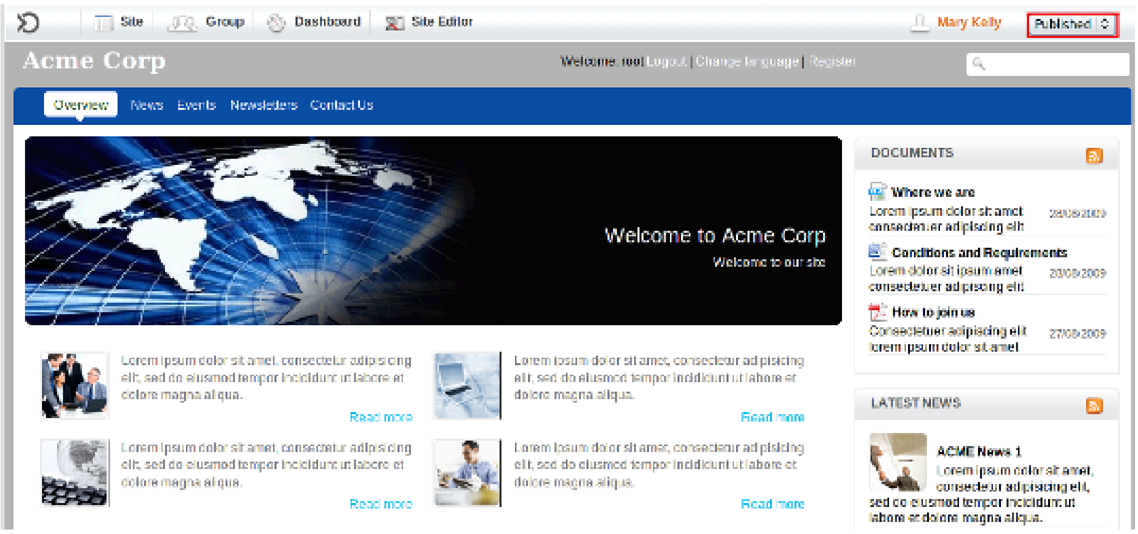
A site in eXo Content has two modes (`Published` mode and `Edit` mode) which are specific for viewing and editing the site, respectively. You can easily switch between these modes by selecting in the drop-down list at the top left corner.



Edit mode
: In this mode, you can edit all contents of the current site. When hovering the mouse pointer over contents, you can see edit icons which enable you to quickly edit those contents. You can take advantage of this feature to submit contents to a page.

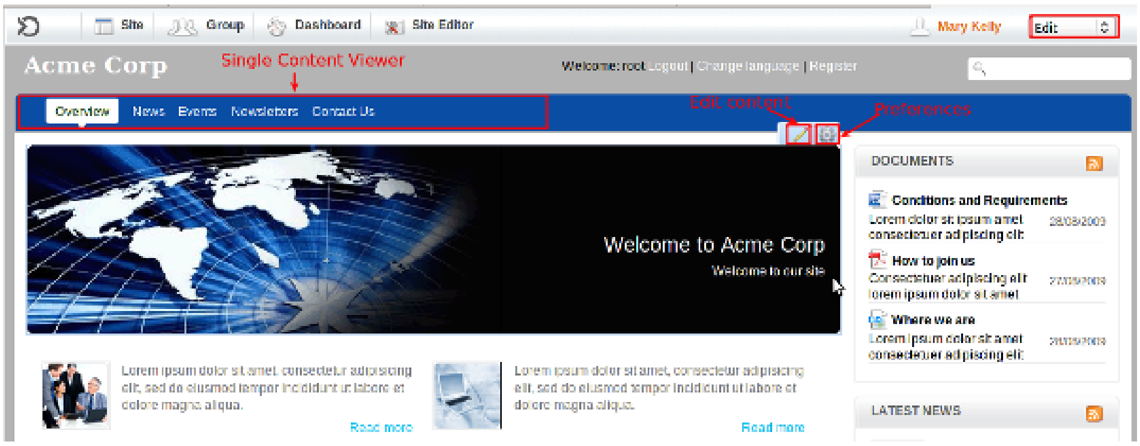
Published mode
: In this mode, you only can view the current site without editing the contents of the site.

When you login to a site, by default, the page is in the published mode, you cannot see any quick edit icons 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.

4.4.2. InContext Editing

InContext Editing enables 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.

4.4.2.1. Add Content

Adding a new content by InContext Editing is enabled for the Content List Viewer.

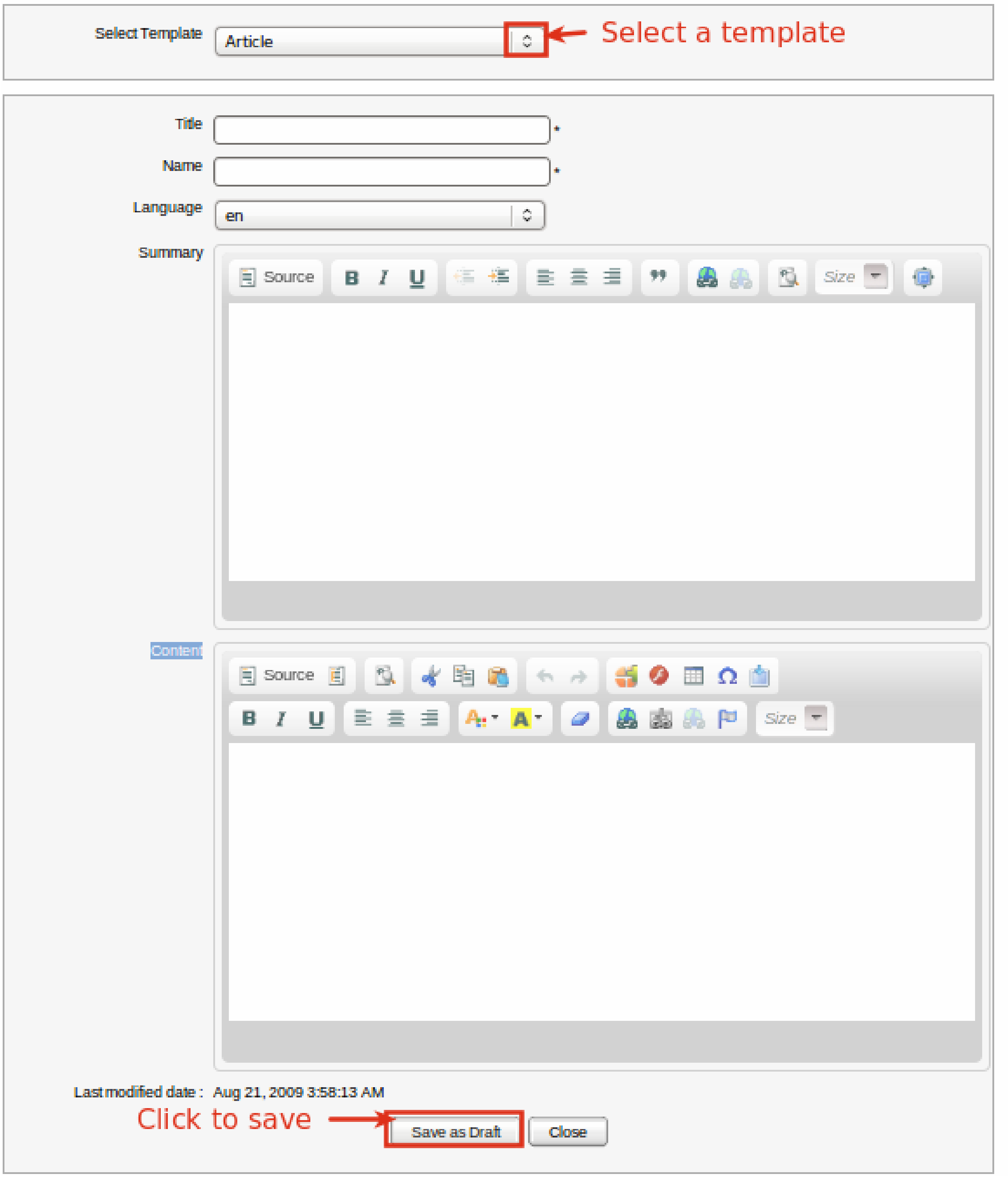
Do the following:

Procedure 4.5. Add a new content

1. Turn on the Edit Mode and hover the mouse pointer over 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.



3. Click the icon to open the template list and select one.

4. Fill all the fields in the form. See *Section 4.7.4.2, “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.

> **Note**
>
> Saving a document in which folder of the Collaboration drive depends on the path you choose in*Section 4.4.2.4, “Preferences”*.

4.4.2.2. Edit Content

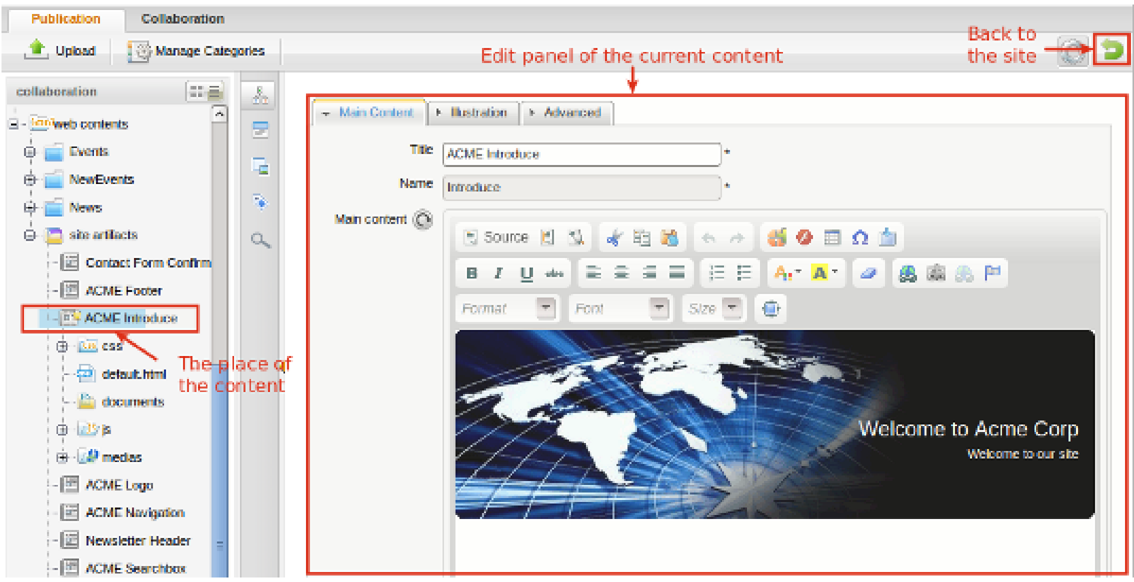
You can edit any contents on the homepage for SCV and CLV with InContext Editing. For CLV, you only can edit each content in it.

Do the following:

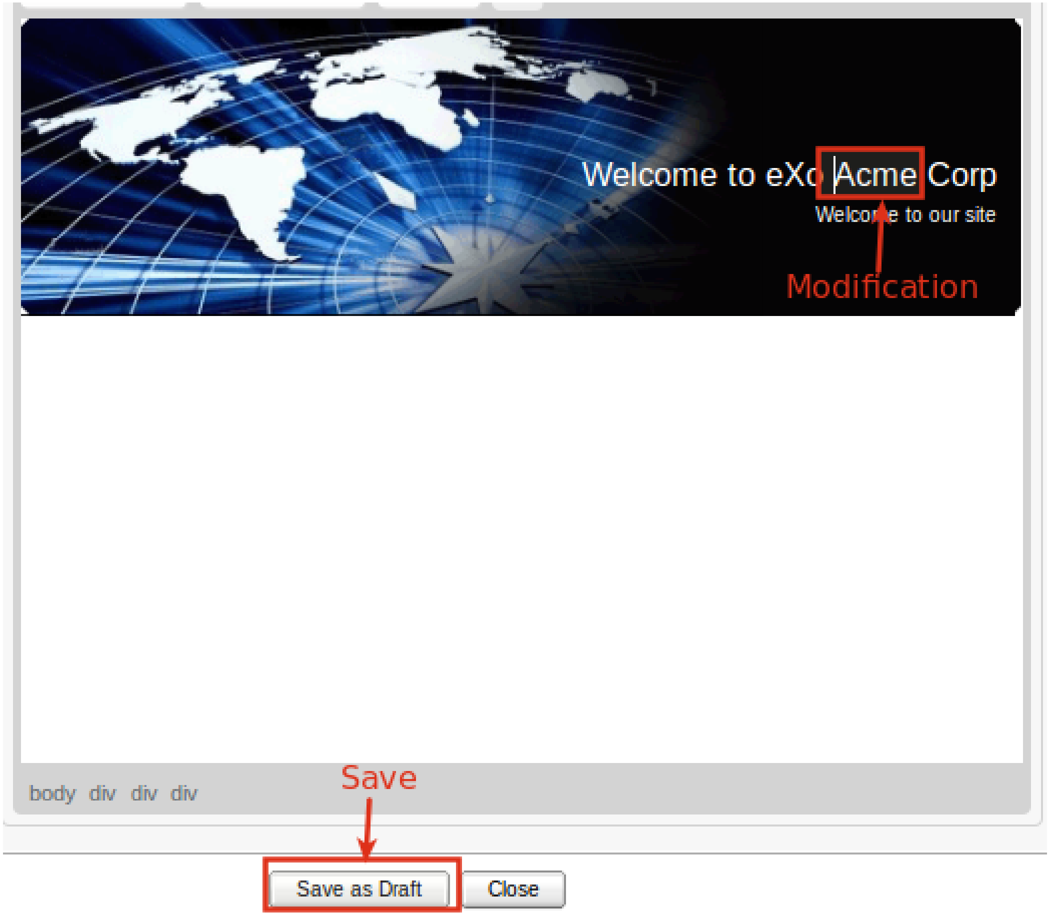
Procedure 4.6. Edit a content

1. Turn on the Edit Mode and over the mouse pointer over the content you want to edit.

2. Click the  icon at 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 and click **Save as Draft** to save the content.



4. Click the  icon to return to the site and in the Edit Mode, the content in the *draft* state will be 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 4.4.3, “Publication Process”* for instructions on how to publish content.

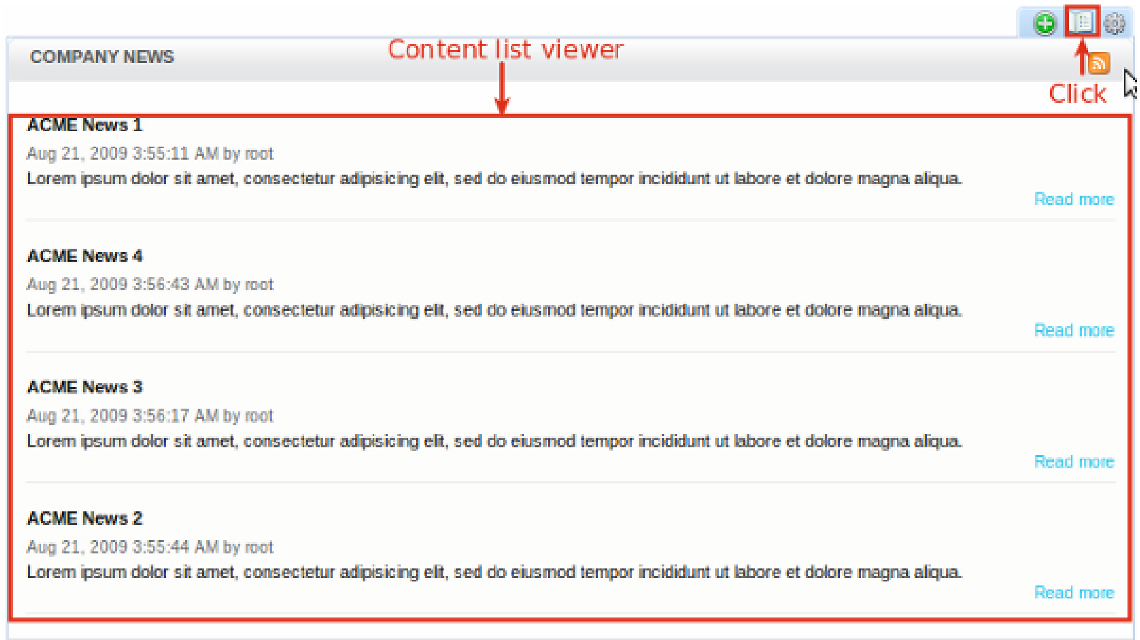
4.4.2.3. Manage Content

With InContext Editing, you can easily manage a Content List Viewer on the homepage. You can add a new content in the CLV, edit, delete an existing content or copy/cut/paste to another CLV and take more actions in the right-click menu.

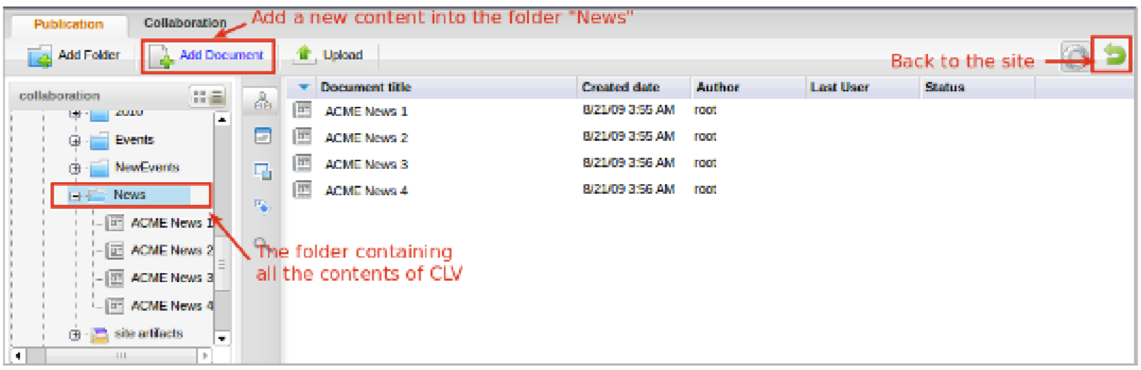
Do the following to manage content in the CLV.

Procedure 4.7. Manage Content

1. Turn on the Edit Mode and click 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. To add a new document to the CLV, click **Add Document** on the action bar and do the same steps as*Section 4.4.2.1, "Add Content"*.

To take other actions on a specific content in the CLV, right-click it to open a drop-down menu. See more details how to takes the actions in*Section 4.7.6, “Actions on Folders and Documents”*.

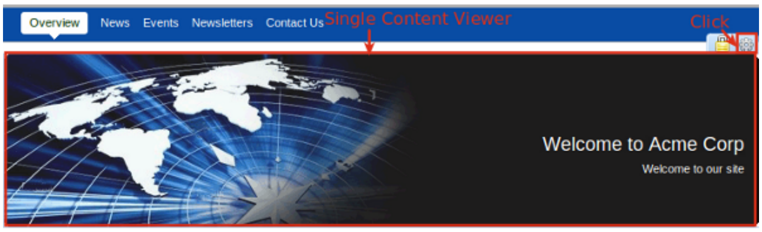
4.4.2.4. Preferences

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. Do the following to edit the Single Content Viewer:

Procedure 4.8. Edit Content Detail Viewer

1. Turn on the Edit mode and click the **Preferences** icon of a Single Content Viewer.



The **Content Detail Preferences** dialog appears:

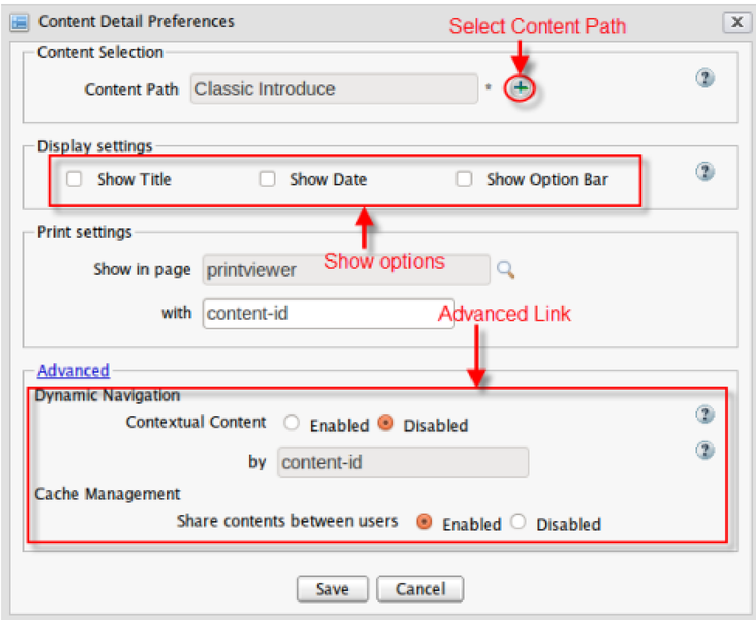


Table 4.6. Content Detail Preferences

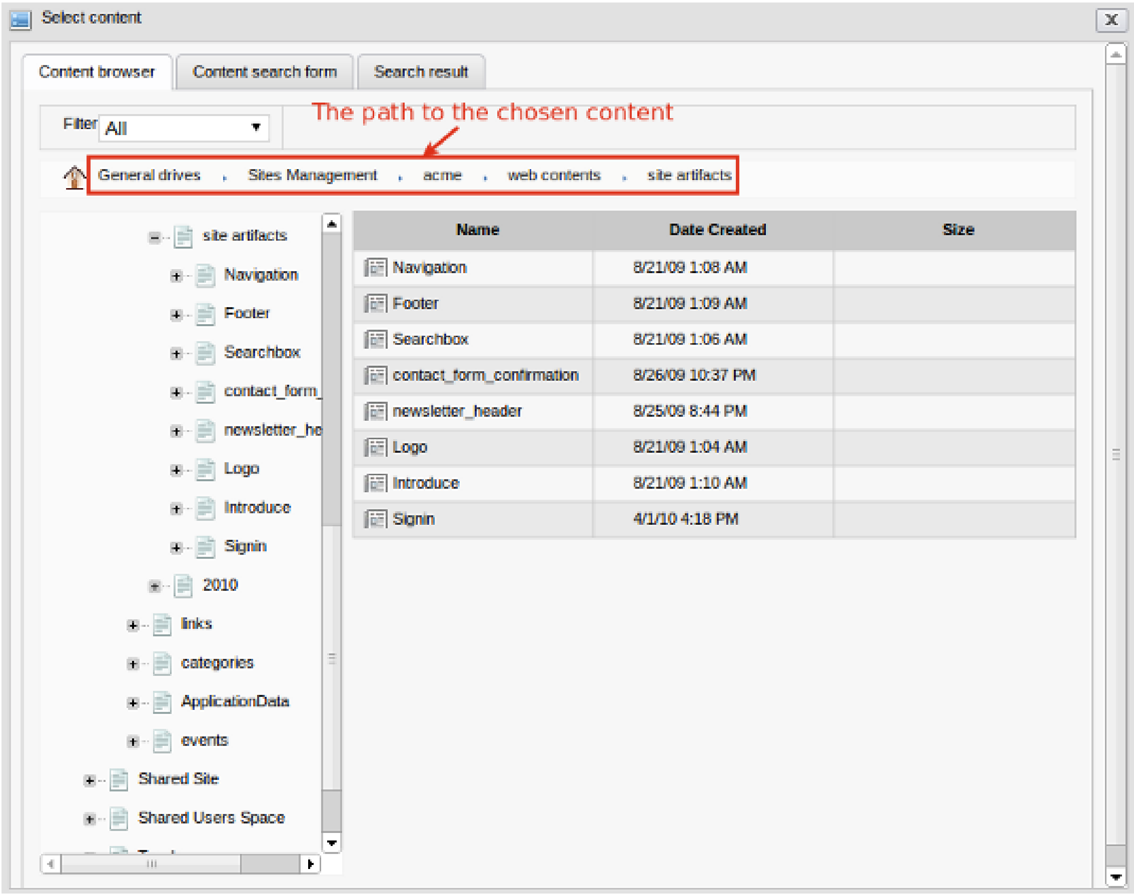
Field	Details
Content Selection	Select the path of the content that you want to show by clicking the  icon.

Field	Details
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 in the page. • **with**: Parameters contains the content path.
Advanced	When clicking on this link, the Advanced pane will be shown: • **Contextual Content**: If the **Contextual Content** property is set as "Disable", the Advanced pane is closed by default. The content should enable “dynamic navigation” that interprets the URL and shows a content. • **Cache Management**: Allows you to use a cache shared between users to get contents. By default, **Share content between users** is set as "Enable", the contents displayed in CLV or SCV are got from one cache.

Note

Click the  icon to see a quick help pane for each section.

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



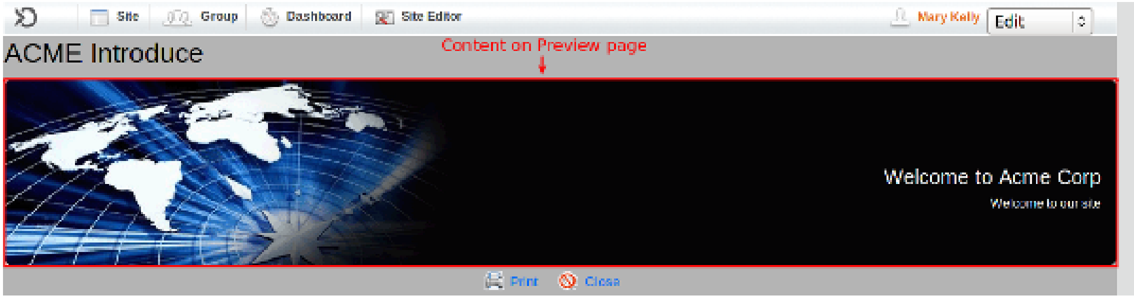
3. Choose a folder on the left panel and a content in the folder on the right panel. The content chosen will be displayed in the **Content Path** field.

4. Tick the checkboxes, including the **Show Title** box, the **Show Date** and the **Show Option bar** box if you want to display the content title, the publication date and the print button like the illustration below:

5. In the **Print Setting** area, click the icon to open the **UIPageselector** dialog, you will see **Printviewer.**

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

Example 4.1. Example



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

printviewer?: the print viewer page of the content.

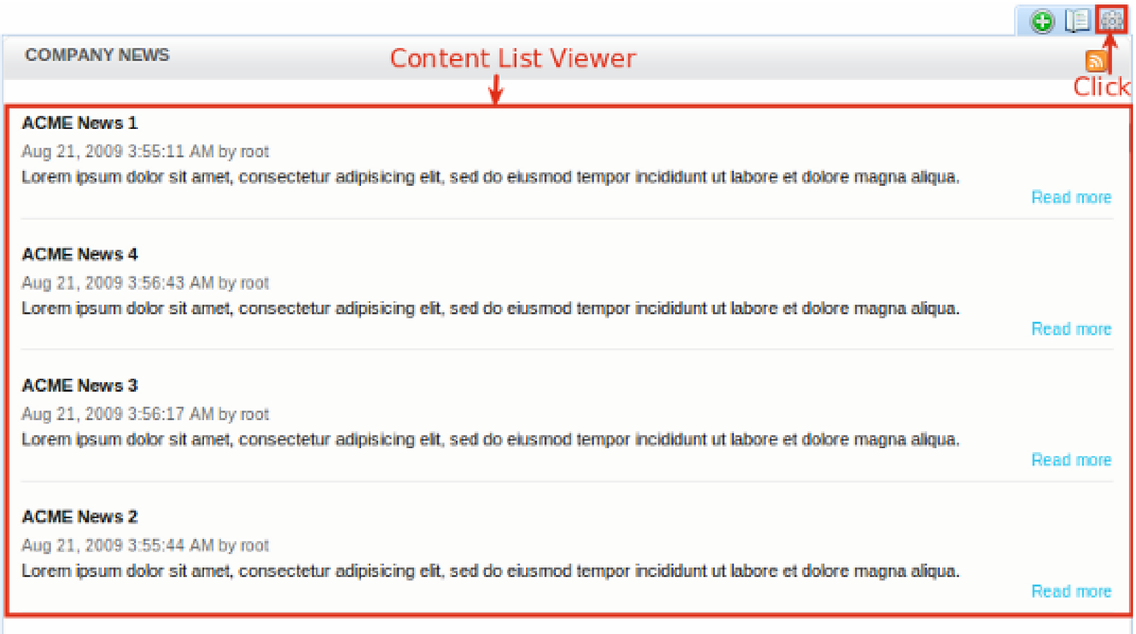
content-id: the parameter containing the content path.

6. Click **Save** to save all the changes.

Content List Preferences. To edit the Single Content Viewer, do the following:

Procedure 4.9. Edit Content List Viewer

1. Turn on the Edit Mode and click the **Preferences** icon of a Content List Viewer.



The Content List Preferences dialog appears:

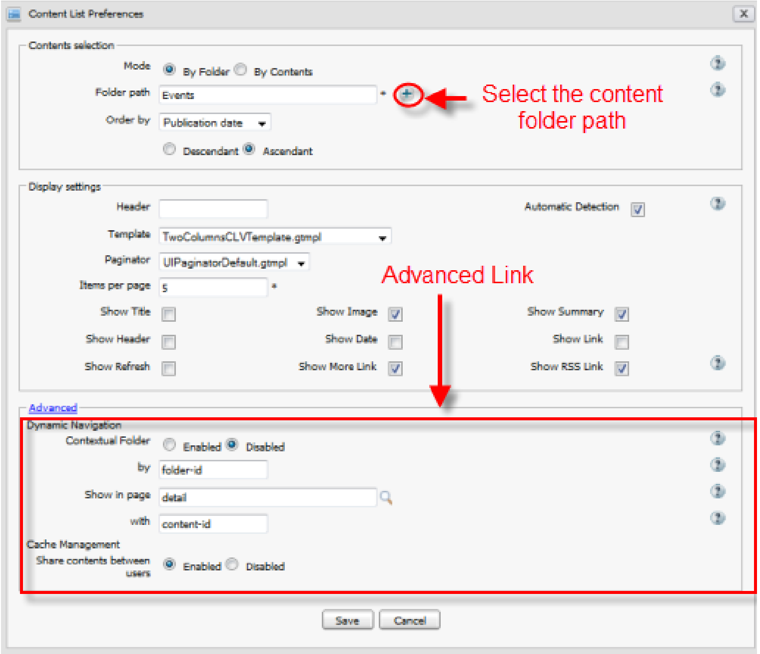


Table 4.7.

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

Field	Details
Show image	The option is to show or hide the illustration of each published web content/document.
Show summary	The option is to show or hide the summary of each web content/document.
Show header	The option is whether to show a header or not.
Show refresh button	The option is whether to show the refresh button at the left bottom of this page or not.
Show title	The option is to show or hide title of each published web content and/or document.
Show date created	The option is to show or hide the created date of each published web content/ document.
Show link	The option is to show or hide the link of web content and/or document.
Read more	The option is to show or hide the Read more to read all the content of a web content and/ or document.

2. Browse the documents or web content of an available site by clicking the  icon next 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 contents** 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 the Content List. The selected content is listed in the Content List.

4. Enter a header for the content list in the **Header** field if desired.

5. Select a template to display the content list in the template list.

6. Tick/untick the options that you want.

7. Click **Save** to save all the changes.

4.4.3. 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:

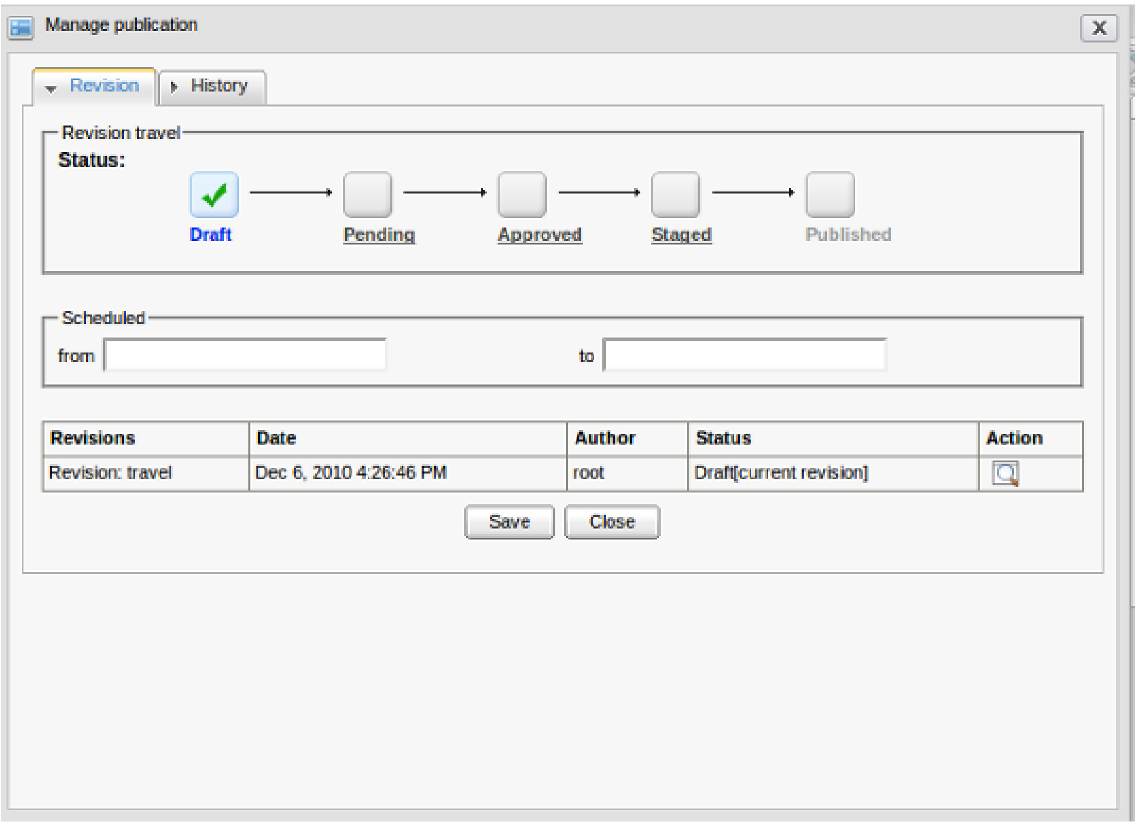
Request approval → Approval → Stage → Publish

If you do not have the right to approve or publish content, you need to send an approval request to have you content approved and published.

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:



Approve

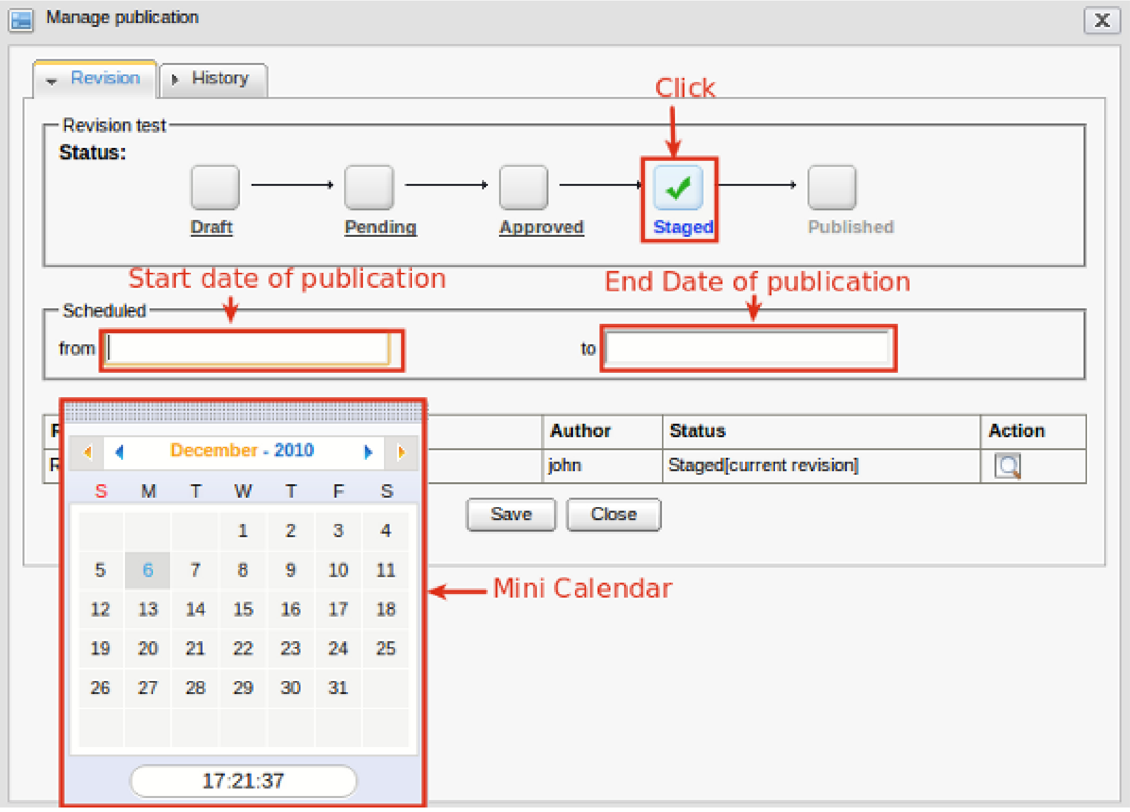
To approve a content, click**Approve**on the action bar of the Content Explorer or click **Approved** in the Manage Publication.

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** and click **From/To** to open a mini calendar and select the date to publish.

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



Publish

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

> **Note**
>
> You will see a list of draft contents, pending contents which 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 your desired contents to review, approve or publish.

4.5. 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.

4.5.1. Categories 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 to a category.

Alternatively, creating documents directly in categories automatically creates links to them within the category. When you browse the category, the referenced documents will be found and displayed as children of the category node.

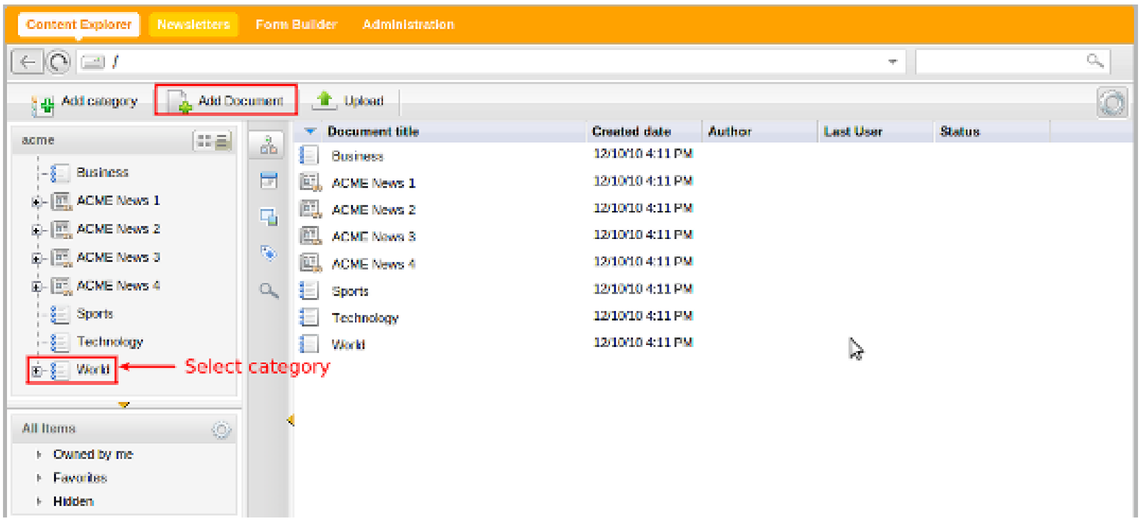
Categories are stored in the JCR itself .

4.5.2. Create a Content

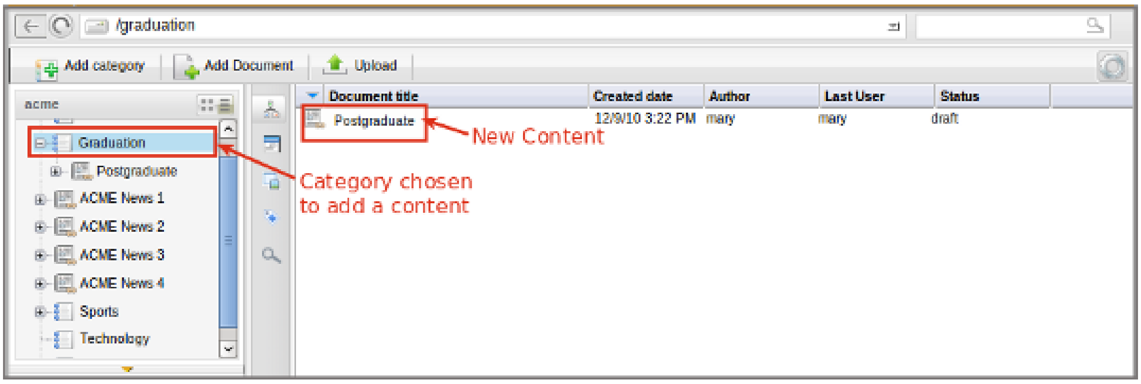
This section will show you how to create a content in a category.

Procedure 4.10. Create a content

1. Go to **Group** → **Content Explorer** and select a drive. For example; **Acme** is available as a drive in the following illustration:



2. Highlight a category in the left pane and click the **Add Document** button to create a new document under the selected category (see *Section 4.7.4.2, "Add a document"* for instructions about how to add a new content). The new content is a symlink.



Click the symlink to view the content.

4.6. Dynamic Navigation

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

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

Procedure 4.11. Access Dynamic Navigation

1. Turn on the **Edit Mode** and hover the mouse cursor over either an **SCV** content element or a **CLV** content element, and then click the **Preferences** icon to open the preference form for SCV or CLV respectively.

2. Show the Dynamic Navigation pane by clicking the **Advanced** link at the bottom of the preferences window.

Example 4.2. Dynamic Navigation in SCV

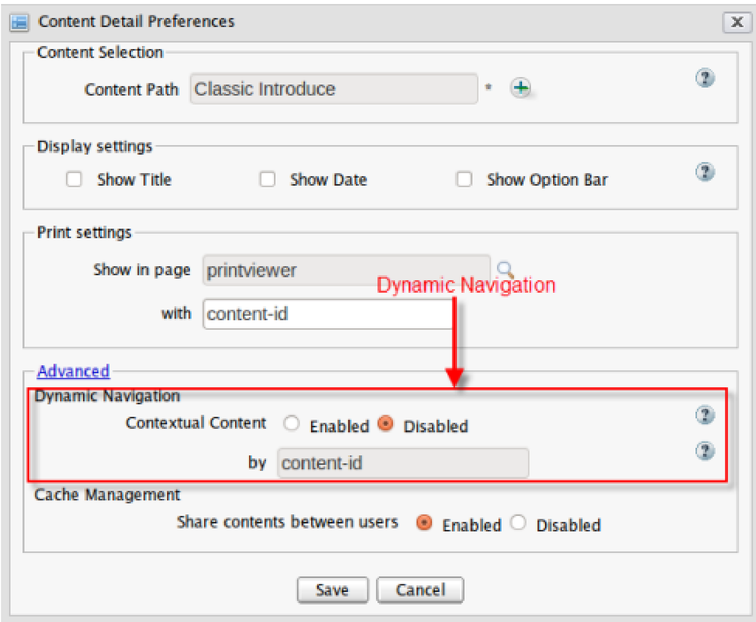


Table 4.8.

Field	Details
Contextual Content	• **Disable**: Means a single content will be opened by an URL containing the Content Path. • **Enable**: This portlet is configured with the provided parameter (content-id by default).

Field	Details
By	This parameter is the key in the URL to let SCV know which is the path in the current URL. It is editable when Contextual Content is enabled.

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

*http://example.com:8080/ecmdemo/private/acme/printviewer?**content-id**=/repository/collaboration/sites content/live/acme/web contents/site artifacts/**Introduce**&isPrint=true*

Example 4.3. Dynamic Navigation in CLV

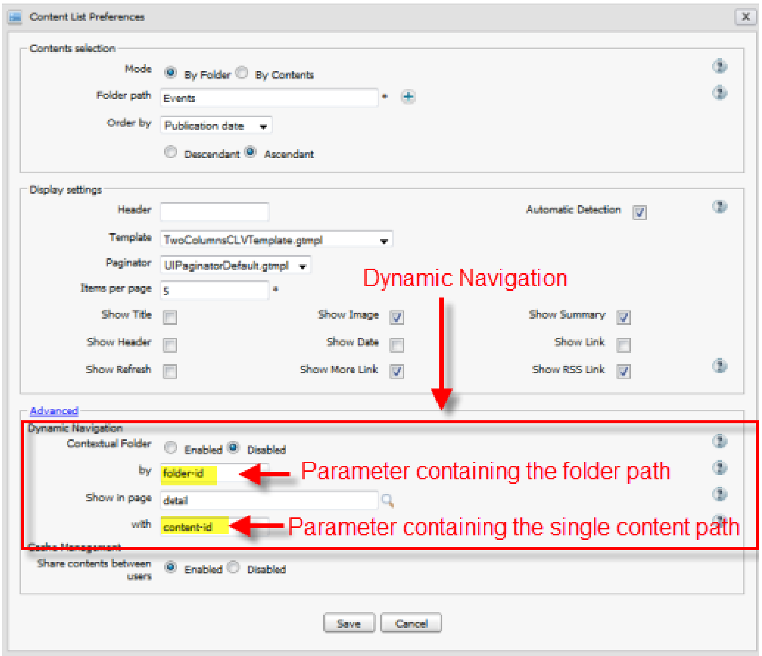


Table 4.9.

Field	Details
Contextual Folder	• **Disable**: A single content will be opened by an URL containing the Folder Path (for CLV). • **Enable**: The path of content list (**Folder Path** in the **Content Selection** path) can be dynamically changed by URL.
By	This parameter is the key in the URL to let CLV know which is the actual path in the current URL.

Field	Details
Show in page	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.

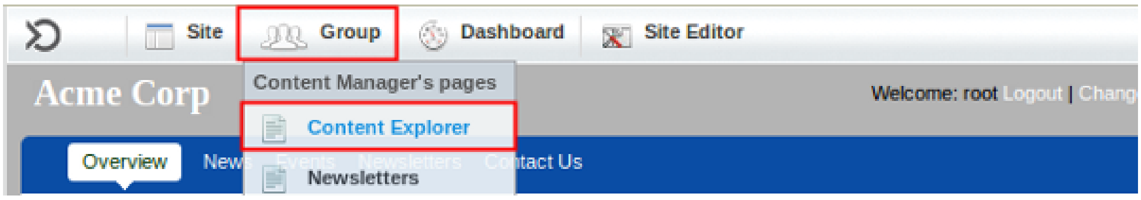
4.7. Content Explorer

4.7.1. Access Content Explorer

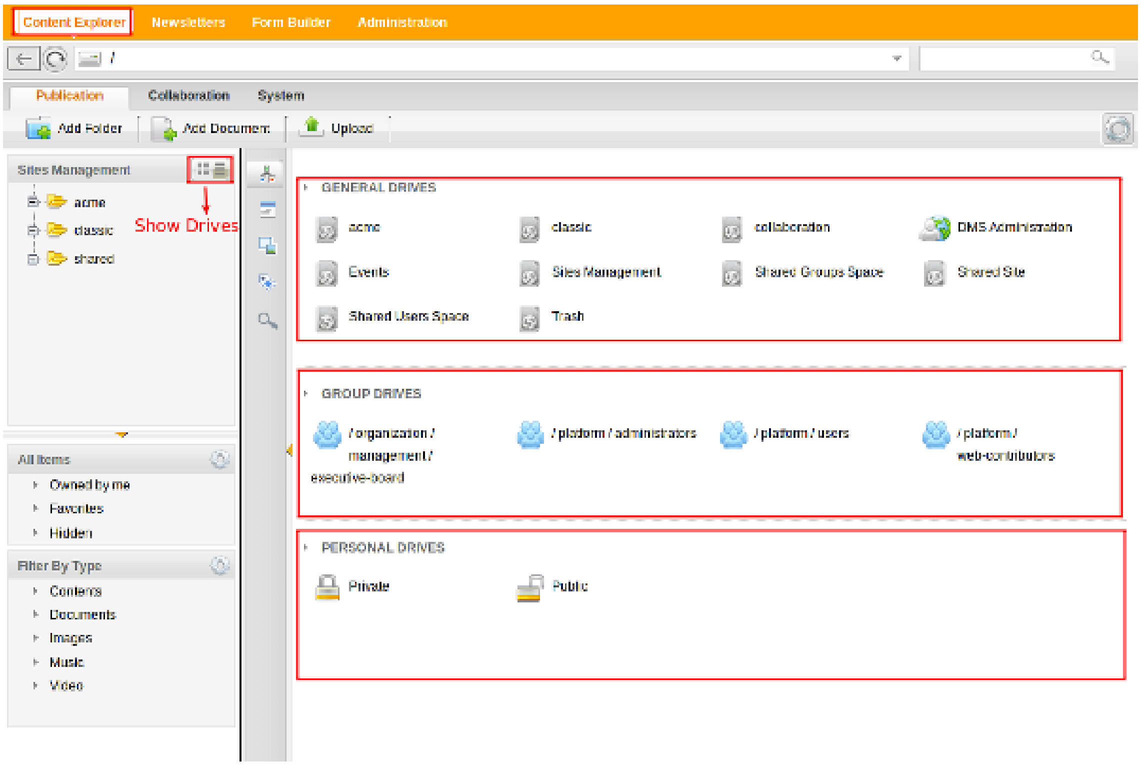
Content Explorer is used to manage all site documents in different drives. Content Explorer offers network access to the content, regardless of where the user is located. By default, any user can access Content Explorer but only users holding particular roles can perform actions in Content Explorer.

Procedure 4.12.

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



A list of all drives (organized into the groups; *Personal drives*, *Group drives* and *General drives*) is displayed:



Personal drives:

A *Personal drive* is the working space of a user. Within this space there is a *Private drive* which is locked to anyone but the user and a *Public drive* for shared resources and collaboration.

Group drives:

A *Group drive* is a working space for all members of that group.

In the following example, the user `root` joins in three groups : *executive-board*, *administrators* and *users* so he has the right to access these groups' drives.

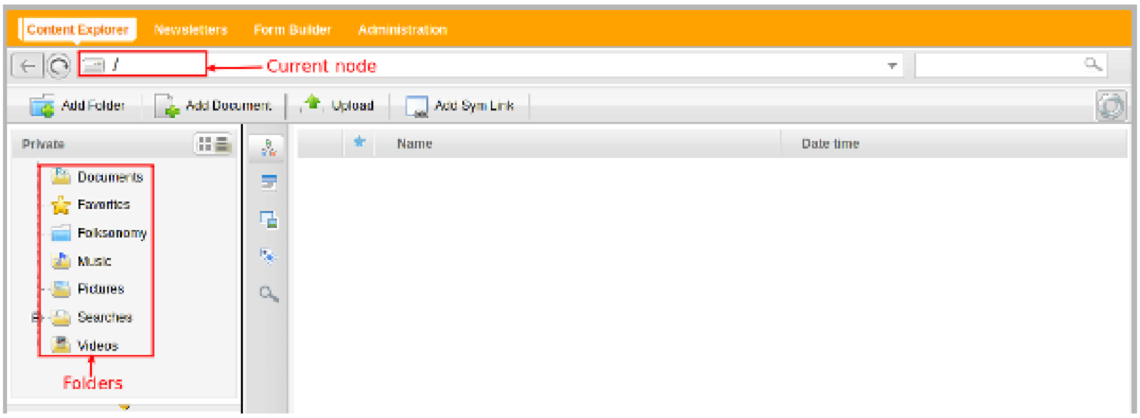
General drives:

A *General drive* is the working space for all users, however your access rights in different drives depends on your role. If you access in an administrator role you can see all drives, otherwise, as a web-contributor, you can only see some drives.

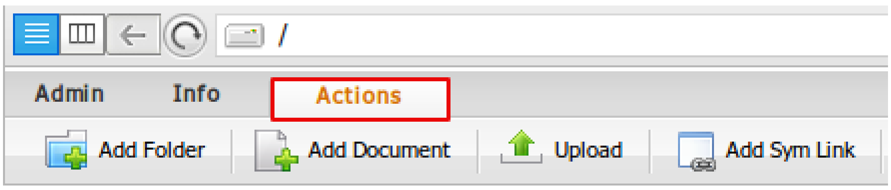
4.7.2. Drives

4.7.2.1. Private drive

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



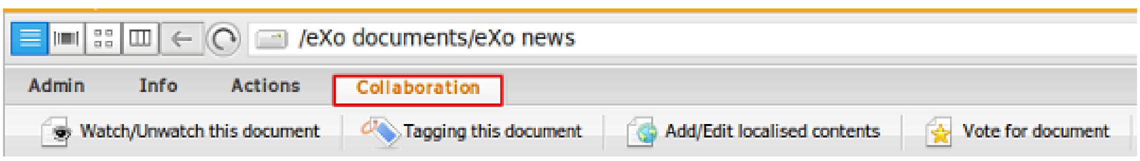
There are some default folders set up to store a user's private resources.

- 

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

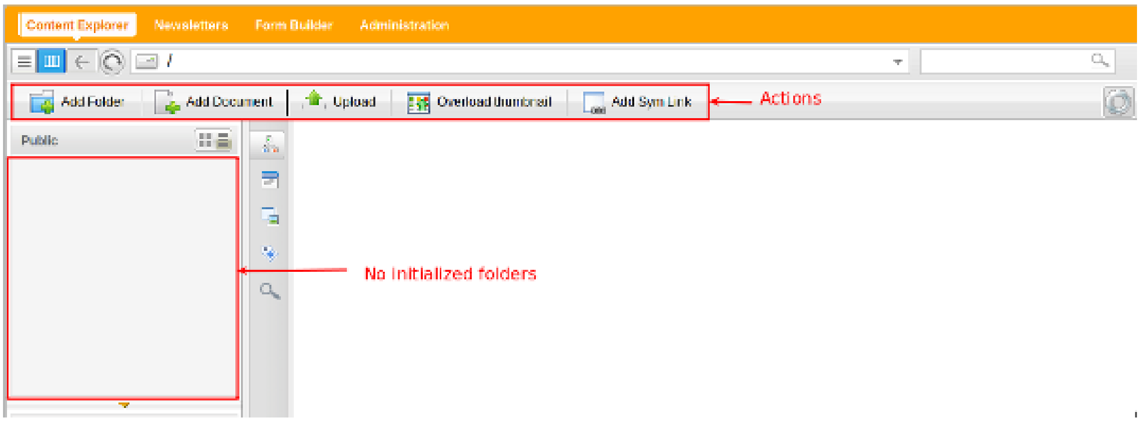
  - Create a new folder.
  - Create a new document.
  - Upload file from your devicef.
  - Add Symlinks.
  - Overload Thumbnails.

- 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:
  - Perform a simple search.
  - Perform an advanced search with more constraints, add new query to search.
  - Search by existing queries.
- In addition, you can:
  - Set up your browsing preferences.
  - Cut/paste, Copy/paste, Delete a node.
  - Lock a node.
  - Rename a node.
  - Use the view WebDAV function to view document content.
  - Download documents (folders) to your machine.

4.7.2.2. Public drive

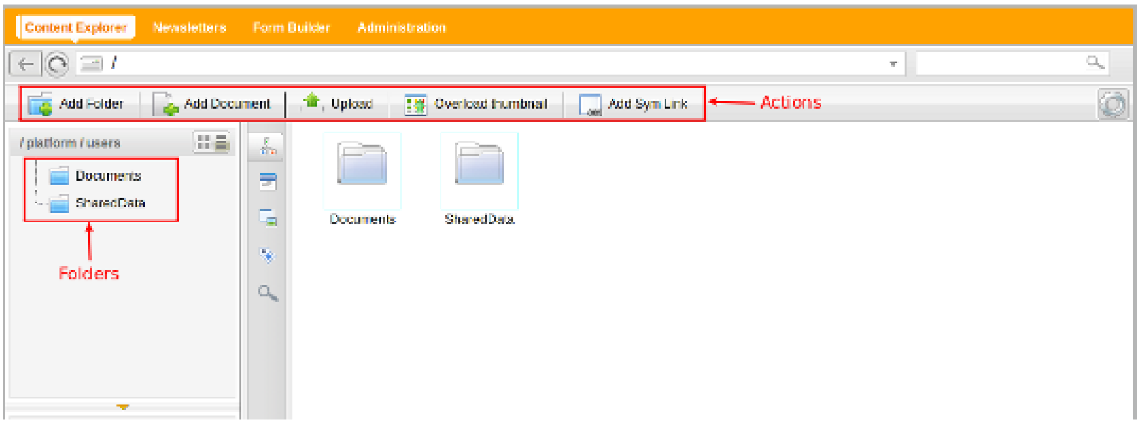


There are no default folders in a Public drive, but users can create any folders they require.

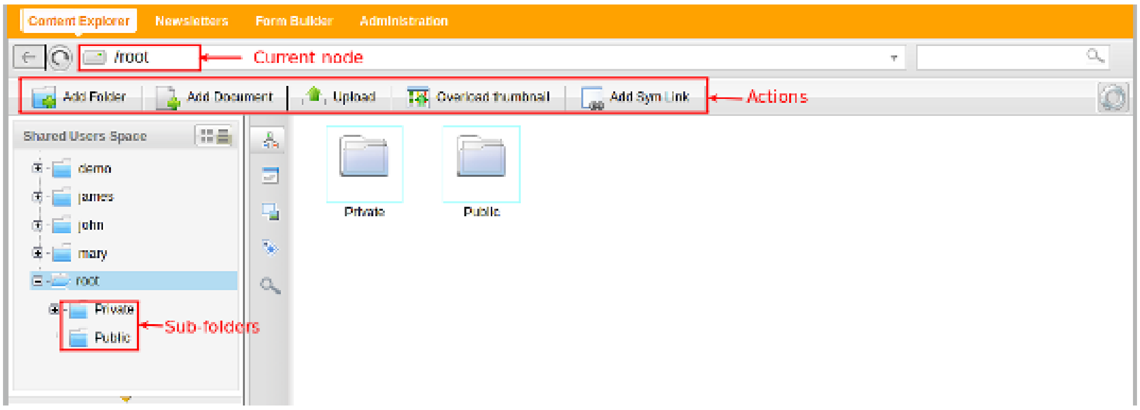
All actions available to users in Private drives are also available in Public drives.

4.7.2.3. Drive of a specific group

Group drives have two default folders, but others can be added as needed. Users can utilize the same actions as in Private drives, the only difference being that only users in the drive's owner group can access the drive.



4.7.2.4. Shared Users Space drive



By default, there will be a list of all existing users, each user has a folder with their username. Each user's folder 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 another users' folder or to child nodes of this folder.
  - Add folders/documents to the top-level folder (the one bearing your username), only in its child nodes *public* and *private*.

- Rename a default folder.
- Lock folders belonging to another user.
- Delete a default folder.

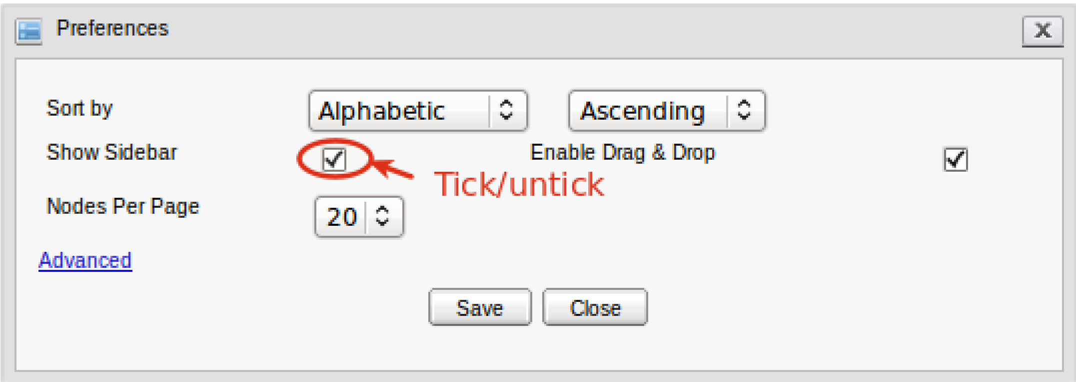
4.7.2.5. Show/hide the sidebar in a drive

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

You can show/hide the sidebar in two ways:

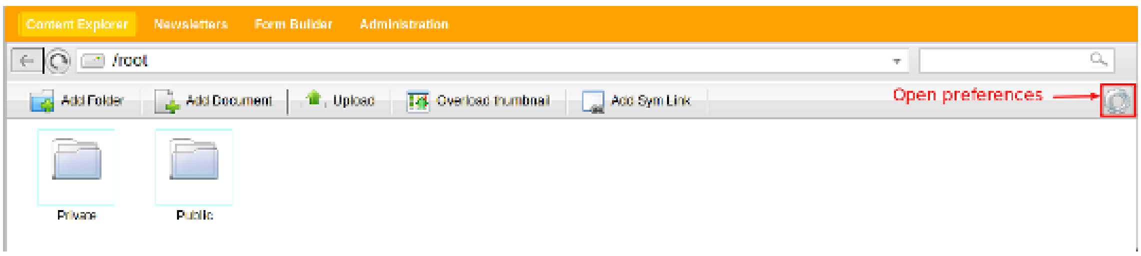
1. **Procedure 4.13. Method 1**

   1. Click the  icon to open the **Preferences**:

   2. Untick the **Show sidebar** checkbox then click **Save**.

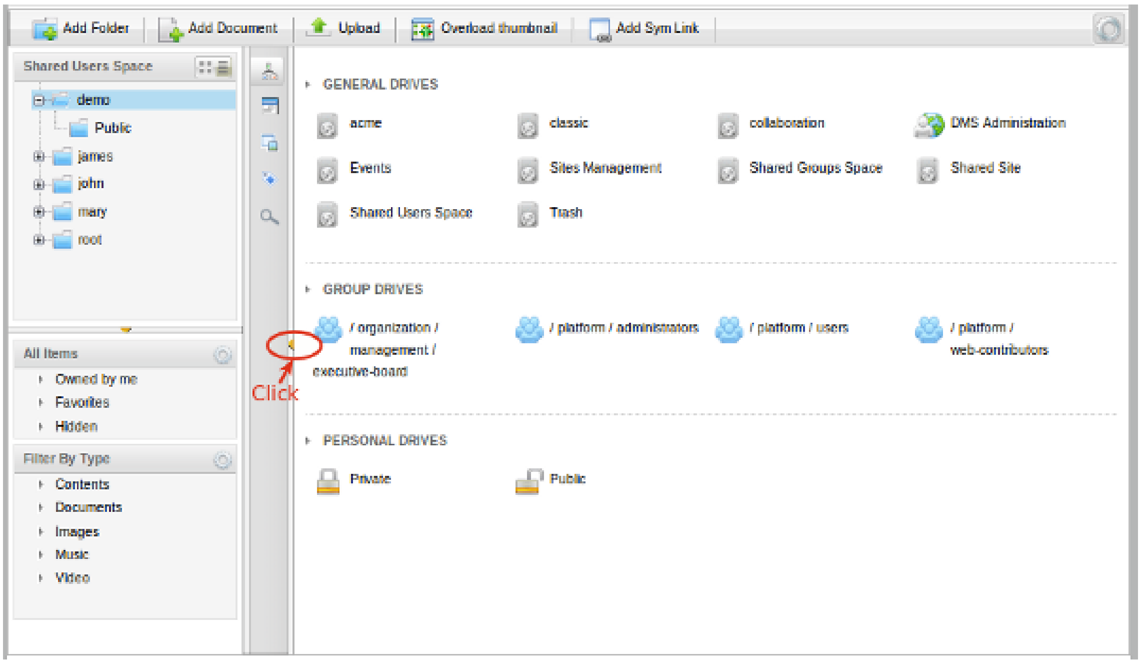
      The drive will be displayed like the illustration below:

   3. To show the sidebar, tick the **Show sidebar** checkbox in **Preferences**.

2. **Procedure 4.14. Method 2**

   1. Click the **Expand** icon to hide the sidebar:



2. Click the **Collapse** icon to reveal the sidebar again.

4.7.3. Views

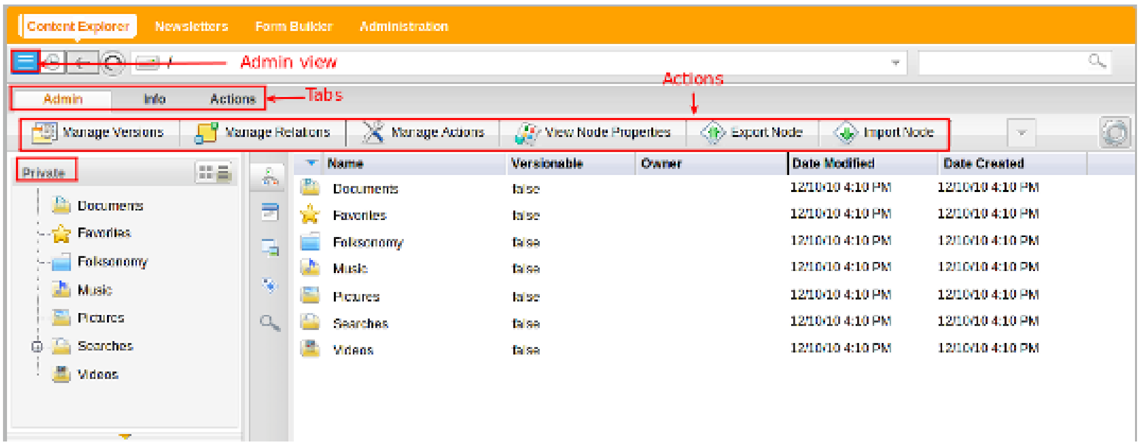
There are many drives in the Content Explorer. Each drive has different views that allow you to look at the data in the drive in a particular way. Each view has various actions available on tabs in the viewing pane.

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

> **View Types**
>
> The number of View types depends on which drive you are browsing. You can manage the view types in eXo Content Administration. See *Section 5.2.2.3, “Manage Views”* for details.

4.7.3.1. Admin view

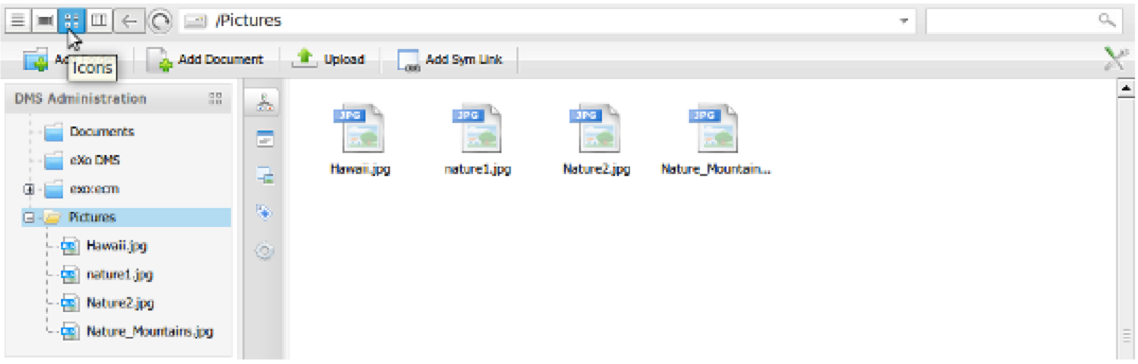
In this view, each item in the list includes the following information: `Name`, `Date Created`, `Date Modified`, `Owner` and `Versionable and Auditing`. This information will help you manage nodes more easily.



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

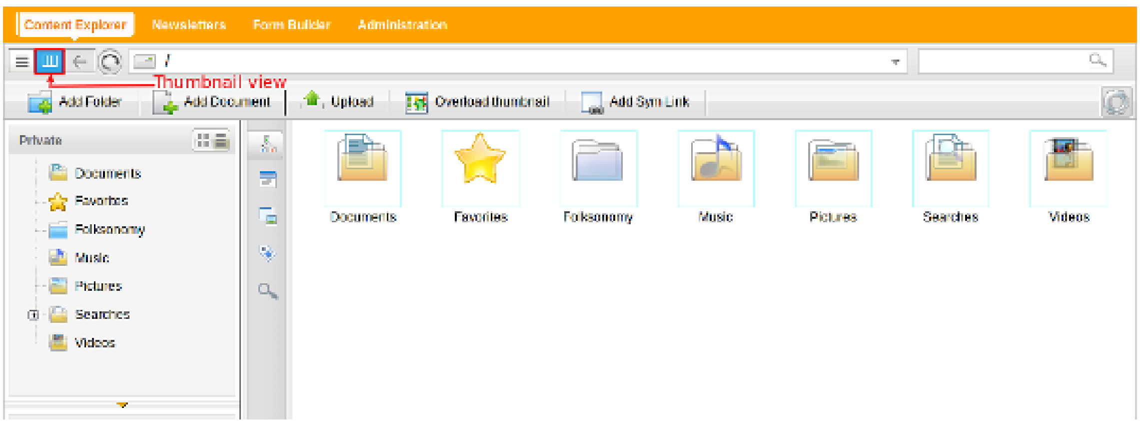
4.7.3.2. Icons View

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

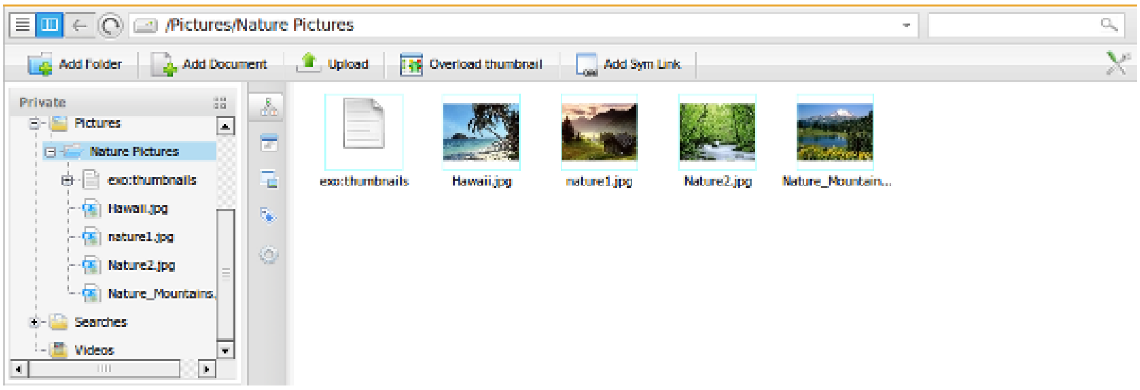


4.7.3.3. Thumbnails View

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



If nodes are image files, their thumbnails will be shown as so:

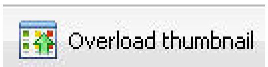


Additionally, when in this view, you can *overload* a thumbnail image for a node. For example, if you want to add a thumbnail image for the **Digital Assets** folder, do the following:

Procedure 4.15.

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

2. Click the

   icon to open the **Add thumbnail image** form.

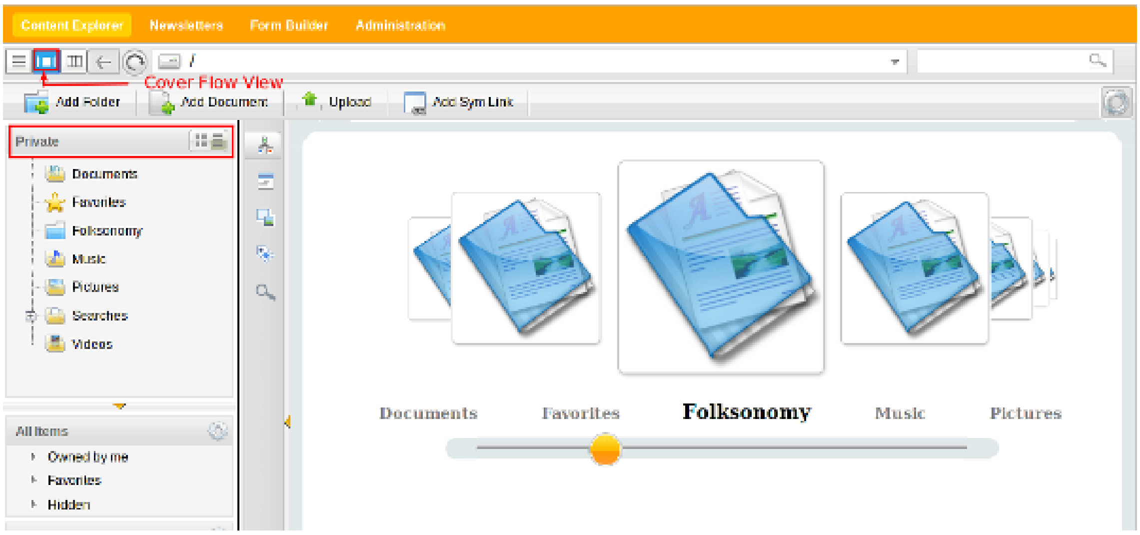
3. Select an image from your machine to use as a display icon for the selected folder.

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

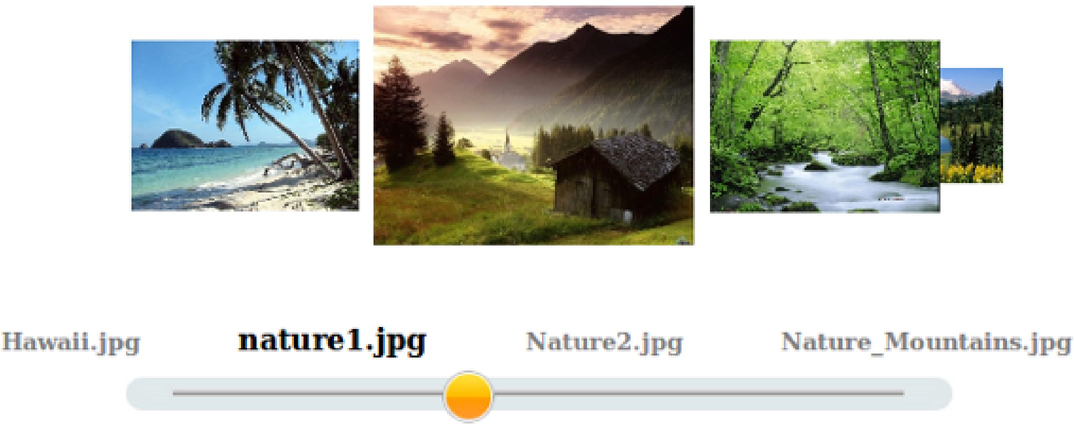
5. Back to the parent folder (folder Pictures in this example) that contains the selected folder to see a icon used to display.

4.7.3.4. Cover Flow View

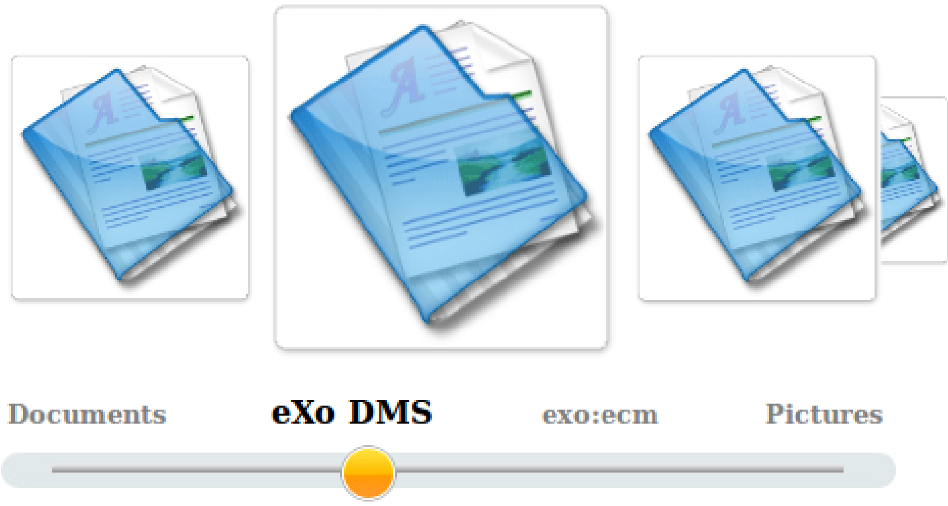
This view is defined as a dynamic view with side-scrolling views of nodes in a folder. In this view, when a node is selected, its name is set with bold effect to set it apart from others.



If nodes are pictures, they appear as:



If nodes are documents or folders, they are displayed as:



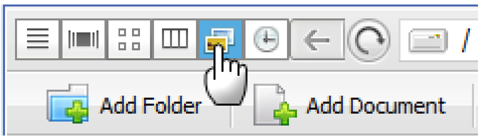
You can move from one node to another in one of three methods:

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

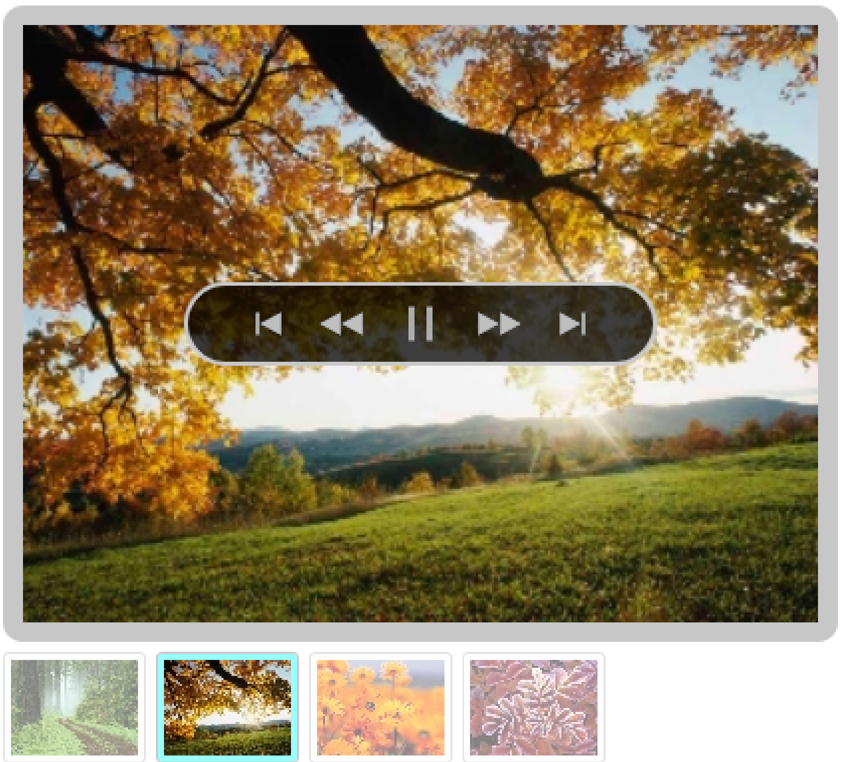
4.7.3.5. Slide Show View

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

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

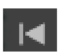


If nodes are pictures, they are displayed as:



The Slide Show view automatically show all picture nodes. Users can control this slide show by clicking the below buttons:

Table 4.10.

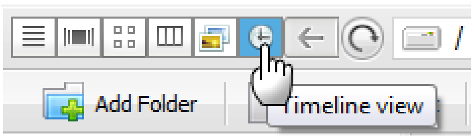
Button	Function
	Go to the first picture node.

Button	Function
	View the previous picture node.
	Pause the slide show.
	View the next picture node.
	View the last picture node.
	Continue viewing pictures node.

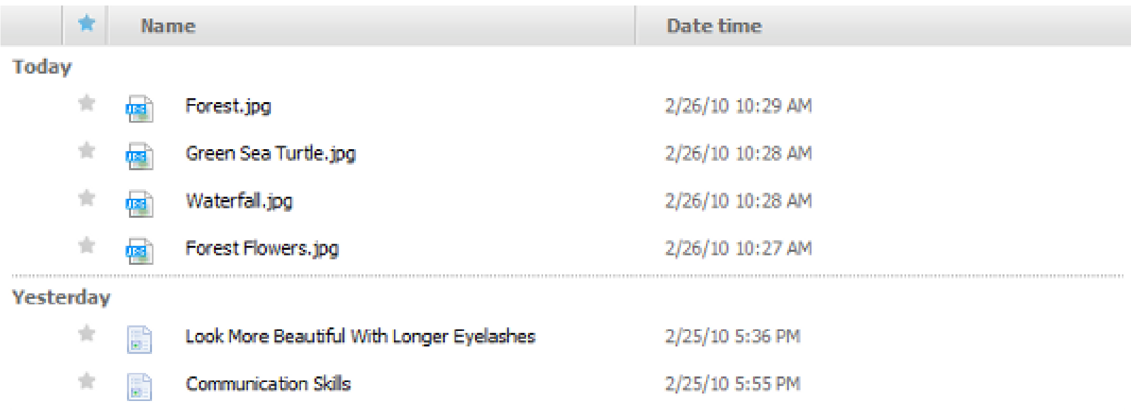
4.7.3.6. Timeline View

This view enables users to view all nodes created and uploaded by time. To use it, click the  icon.

All the nodes that were created and uploaded will be displayed in a timeline:



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



You can also click the icon to mark your item as favorite or the  icon of a favorited node again to remove it from favorites.

4.7.4. Actions

Actions appear as tabs on the action bar of the Content Explorer pane. They are managed by administrators. The actions visible to any given user will depend on their role permissions and the tab and drive they are browsing.

This section discusses the actions available in eXo Content's **Content Explorer** and how to use them.

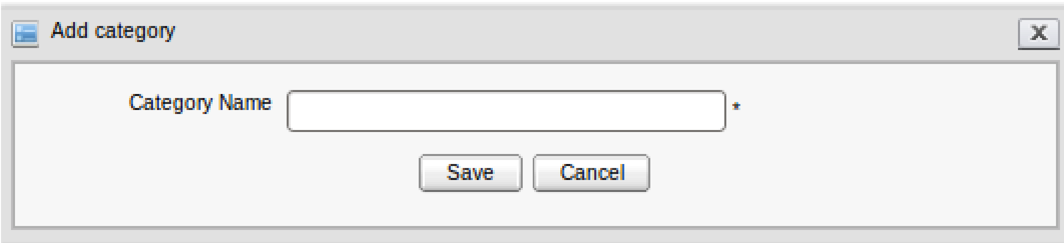
4.7.4.1. Add a category

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

Do the following to add a category:

Procedure 4.16.

1. Choose a node to which you want to add a category.
2. Select the 

button 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 create a new category or **Cancel** to quit from this form without adding a category.

4.7.4.2. Add a document

There are several types of document in eXo Content, including*File*, *Article*,*Podcast*,*Sample node*, *File Plan* and*Kofax*.

The table below shows nodes types to which different document types can be added. 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 4.11.

	File	Article	Podcast	Sample node	File Plan	Kofax documen	Content folder	Documer folder
File	✓	✓	✓	✓	✓	✓	✓	✓
Article	✓		✓			✓	✓	
Podcast	✓	✓	✓	✓	✓	✓	✓	✓
Sample node	✓		✓			✓	✓	
File Plan	✓		✓		✓	✓	✓	✓
Kofax	✓	✓	✓	✓	✓	✓	✓	

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

Note

- The ✓ icon indicates that the corresponding document can be added into.
- A blank entry means the corresponding document cannot be added into.

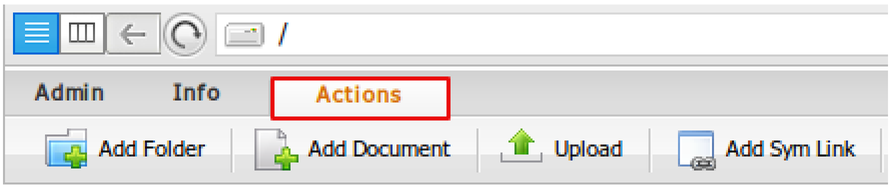
Follow the horizontal, you will know what the node can be added to.

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

Do the following to add a new document:

Procedure 4.17. Add a new document

1. Select a folder from the left panel where you want to add a new document.
2. Click the Add Document button on the Actions bar.



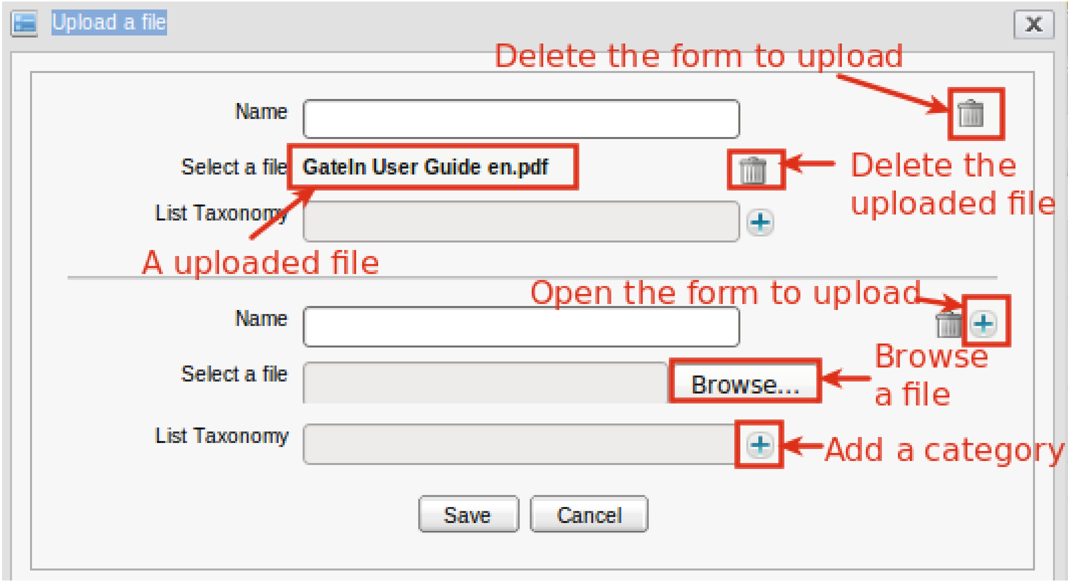
3. Select the document type (template) that you want to create from the drop-down list (**Article** is selected by default).

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

Procedure 4.18. Attach files to a document

1. Select a document that you want to attach files to and click the Upload button 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 the  icon to add multiple files.

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

Procedure 4.19. 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 **Select Template** drop-down list.

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

2. Enter a name for the file document in the **Name** field. Some special characters cannot be used in the **Name** field: @ # % & * ( ) “ ' : ; [ ] {} / !

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

   - *text/html*: When creating a *text/html* File document, you can input source code (*HTML*, for example) in the **Content** field. After being created, the desired content will be generated, then you can see both the inputted source code and the generated content in that document.

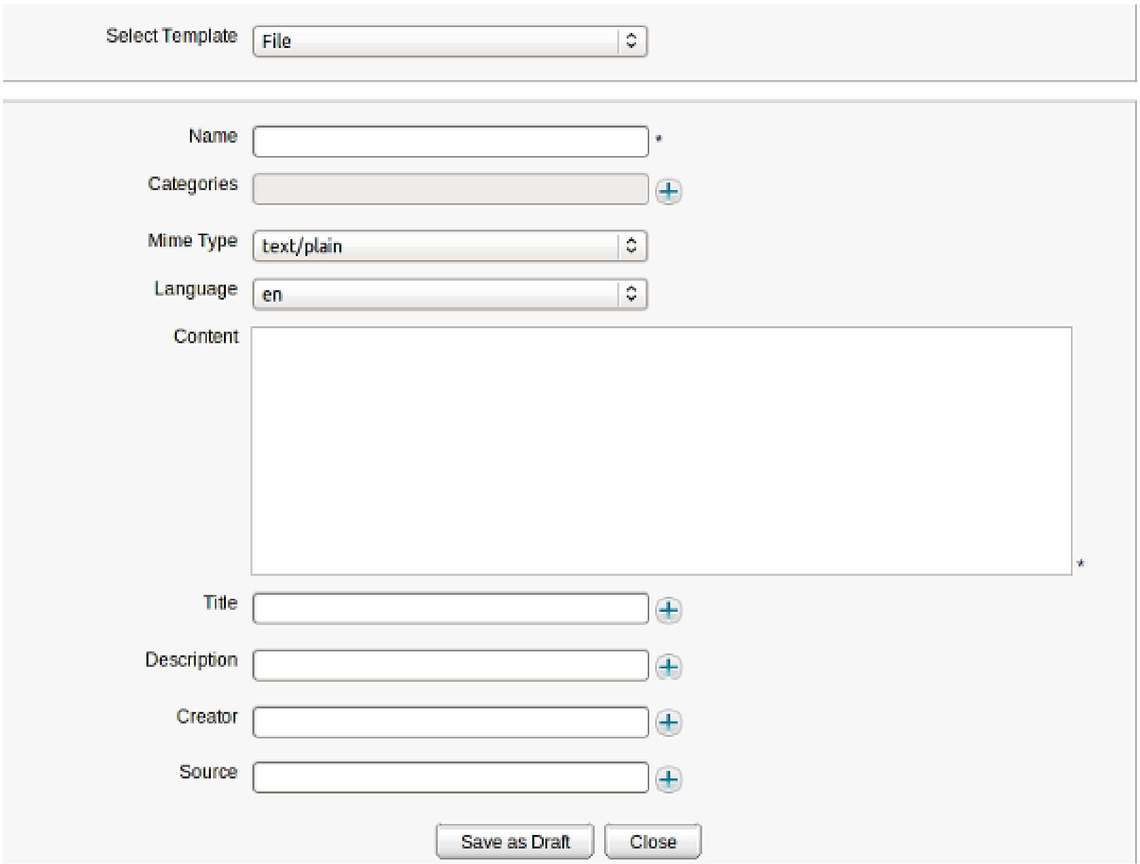
   - **text/plain**: After being created, the content will display exactly what you entered in the **Content** field.

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

   - *text/html*: If chose to create a File document with source code and then generated content (in**Step 3**), click the 

button in the editor bar. In this mode, only the**Save**, **New Page** and **Preview** icons are available. Click the  icon to preview the generated content.

   - **text/plain**: If you selected text/plain type in **Step 3**, the content field will be displayed like so:

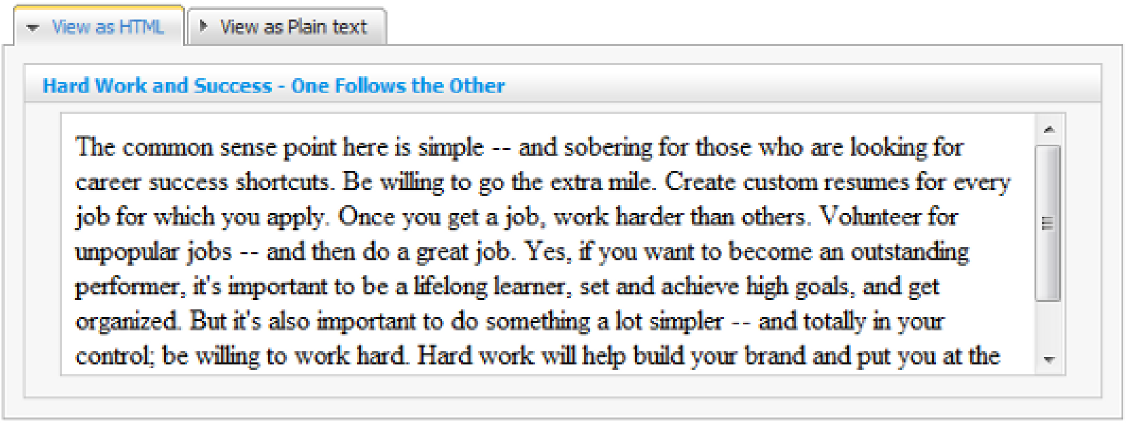


5. Fill values in all the fields, including**Title**,**Description**, **Creator** and**Source**.

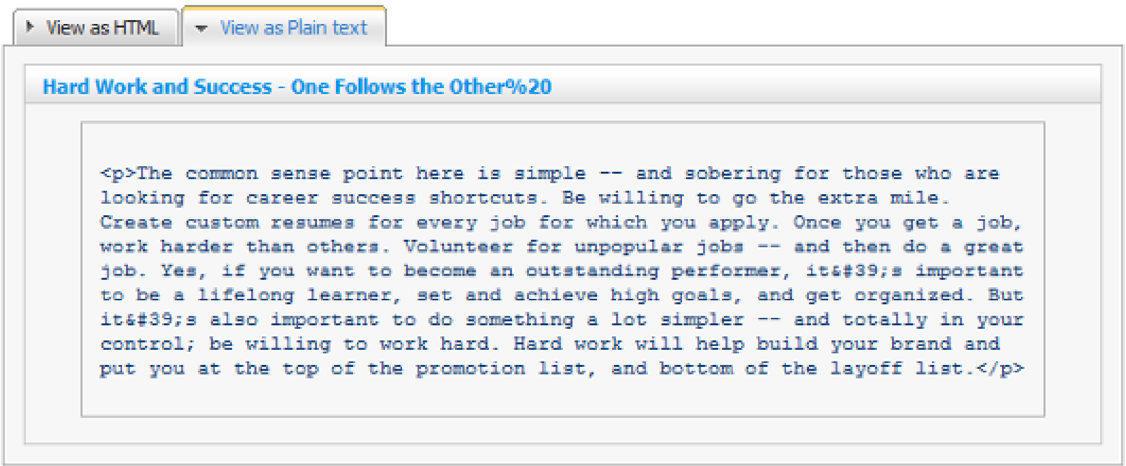
   Click the plus icon to open more fields.

6. Click **Save as Draft** to create a new File document.

   After being created successfully, a *text/html* File document will be displayed as:



You can see both the original and rendered views in the respective tabs at the top of the window:



Procedure 4.20. Create a new Article

1. Follow the steps in *Add a new document* to open the **Add New Document** form. The **Article** type should be selected by default. If not, select it from the **Select Template** drop-down list.

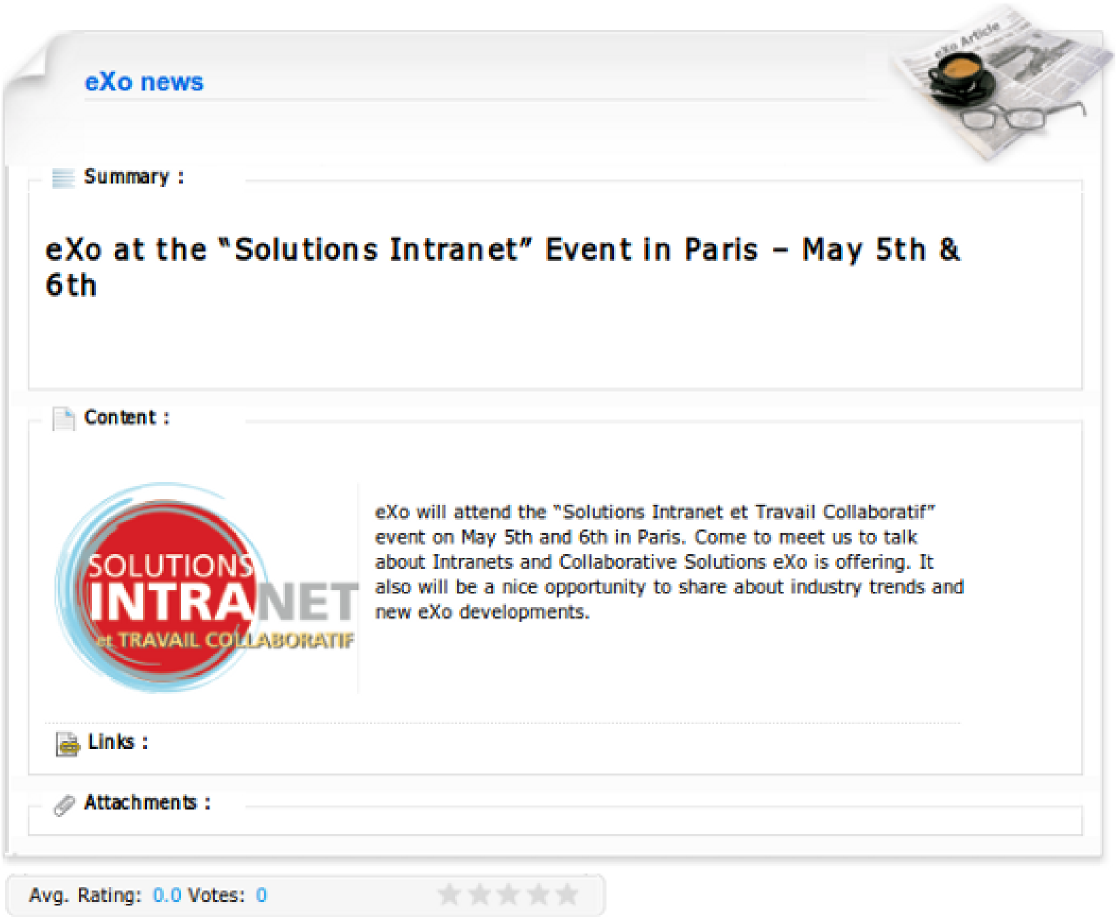
   The **Add New Document** form will be displayed.

2. Input the name and the title of the Article in the **Name** and **Title** field, some special characters cannot be used in the **Name** field (@ # % & * ( ) “ ' : ; [ ] {} / !).

3. Enter some content in the **Summary** and **Content** fields.

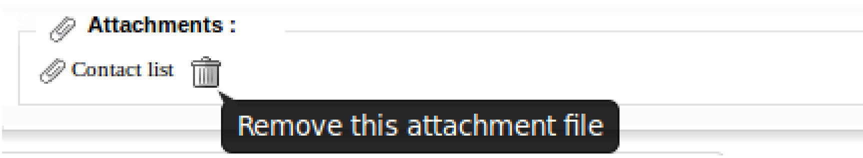
4. Click **Save as Draft** to save the entered content or **Cancel** to quit without saving.

After being created, the new added Article document will appear as so:



The **Links** section is used to list all its related documents. After adding relations for a document you can click these links to view the content of the related documents.

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



For more details about how to add an attachment, see*Attach files to a document*.

Existing Names

Document names can be the same as an existing document. When a new document is created with the same name as another document, the new document name will have an added index (e.g:*test [2]*).

Procedure 4.21. 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 **Select Template** drop-down list.

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

   #### Table 4.12.

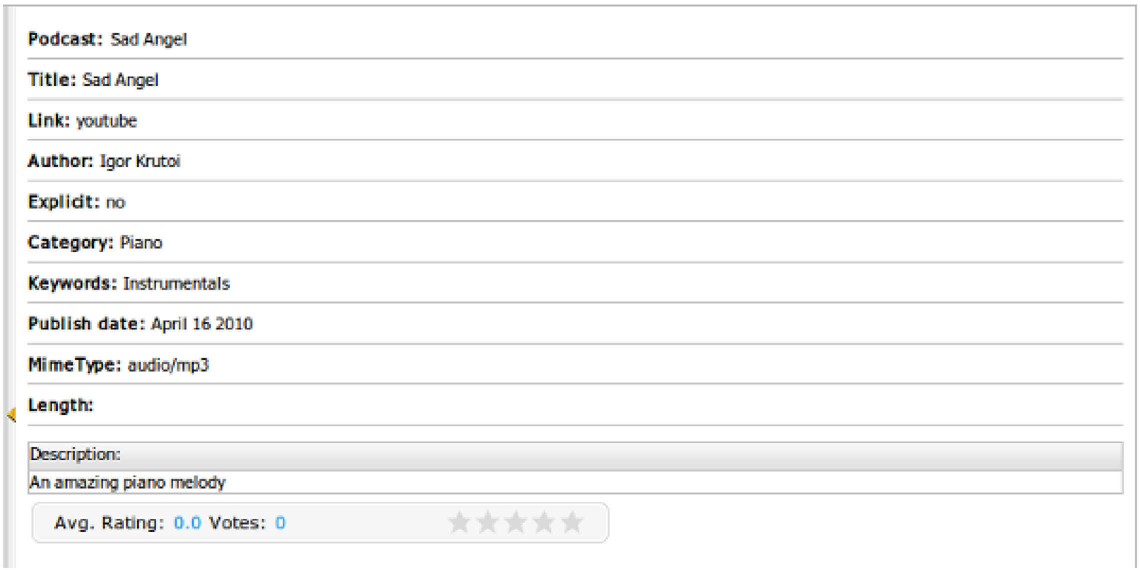
Field	Details
Name	The name of a document. This field is required. Some special characters (@ # % & * ( ) " ' : ; [ ] {} / !) are not allowed.
Title	The title of a document.
Categories	The categories of a document.
Link	The link to the source path of the uploaded media file. This field is required.
Author	The author of the uploaded media file.
Explicit	This field is used to indicate whether or not your Podcast episodes contain an explicit content.
Category	The category of the uploaded media file, example: music, film, short clip, etc.
Keyword	Keyword allows you to search your Podcast files more quickly. You can use commas to separate between keywords.
Publish date	The date when an episode was released.
Description	Information about the uploaded media file.
Mime type	The type of the uploaded media file.
Length	The length of the uploaded media file.

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

3. Click **Save as Draft** to finish.

> **Existing Names**
>
> Document names can be the same as an existing document. When a new document is created with the same name as another document, the new name will have an index added (e.g:*test [2]*)

Once created, a Podcast will appear as so:



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

Procedure 4.22. Create a new Sample node

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

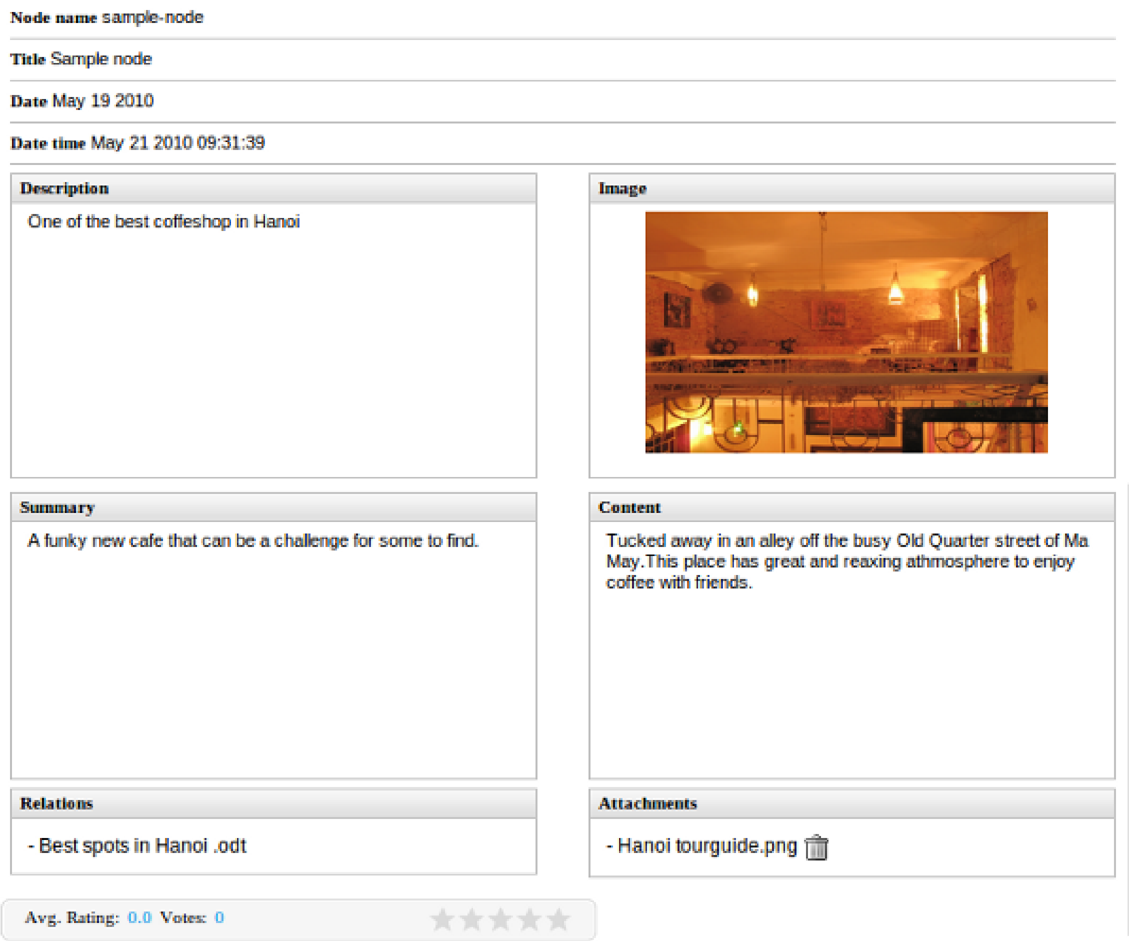
   The **Add New Sample Node** form will appear.

2. Complete the appropriate fields.

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

4. Click **Save as Draft** to accept.

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



The **Relations** area is used to list all related documents. See*Section 4.7.4.15.3, "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 4.23. Create a new File Plan

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

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

2. Fill in the appropriate fields of the tabs in the Add File plan form.

3. Click **Save as Draft** to accept creating a file plan.

Tabs in the Add File plan form

The **Name** tab

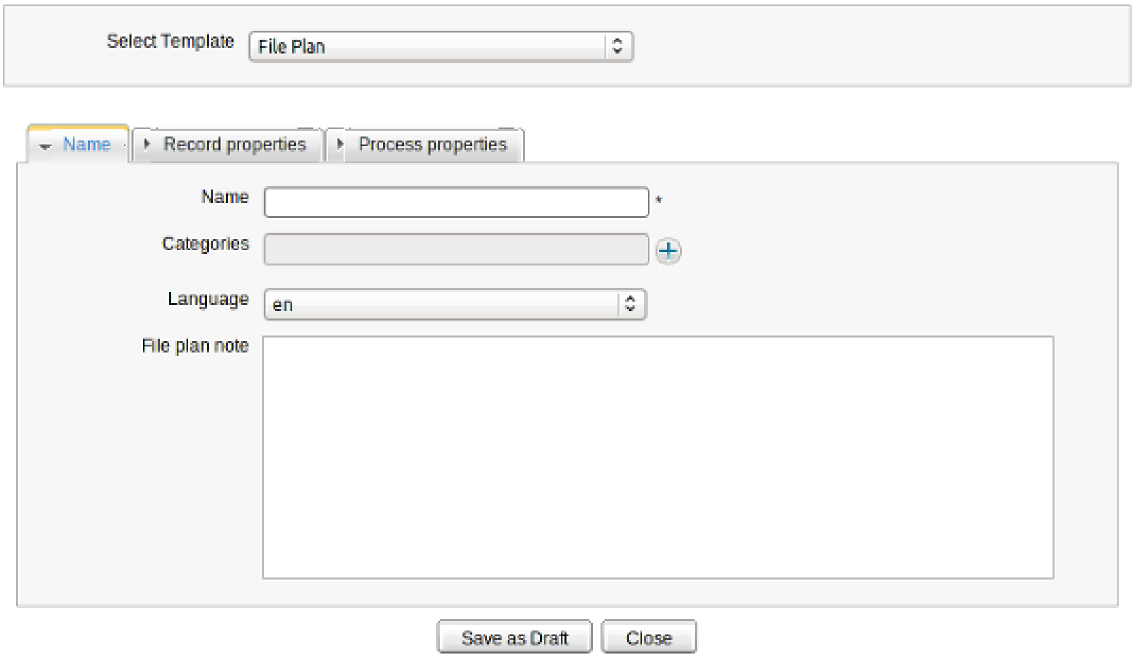


Table 4.13.

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  icon.
File Plan note	A Note can be added to offer further information to users.

The **Record properties** tab

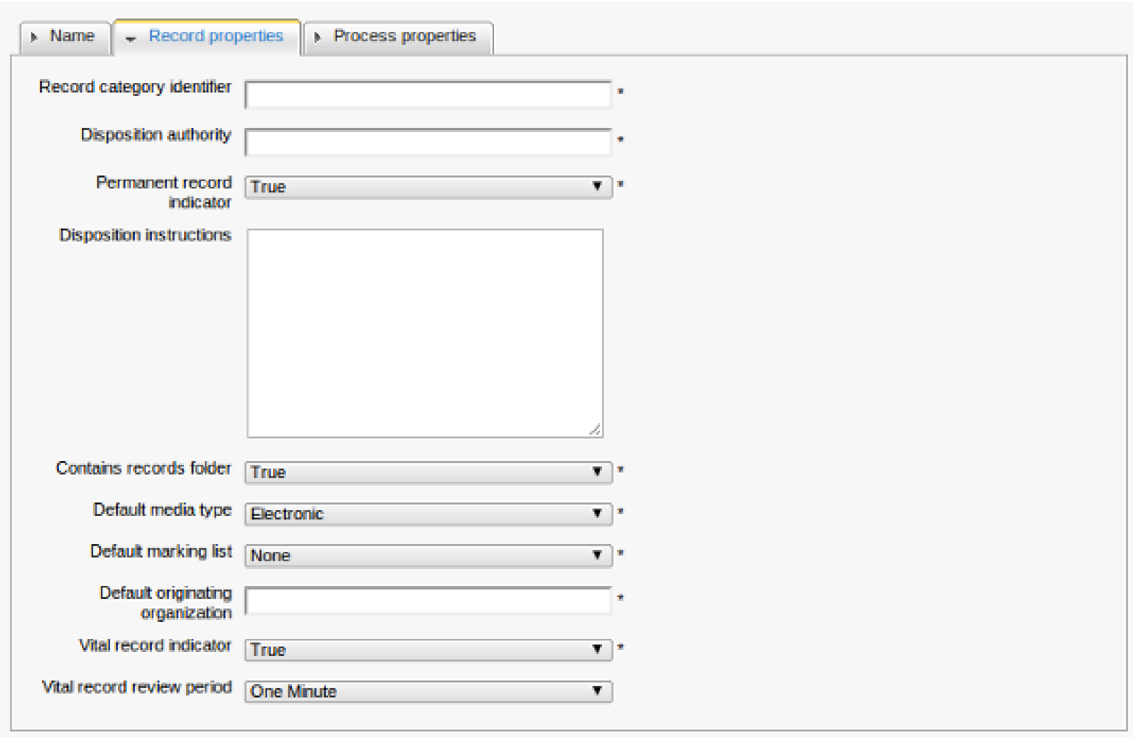


Table 4.14.

Field	Details
Record category identifier	The alphanumeric 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. This is usually set to *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 will set a default*originating organization*. This can simplify the data entry that needs for record keeping. It assumes that the originating organization is the same for all the information in the file plan.
Vital record indicator	This flag is to allow whether tracking or reminding you of the record as essential or not.
Vital record review period	The choice for the interval of time between vital record reviews.

The **Process Properties** tab:

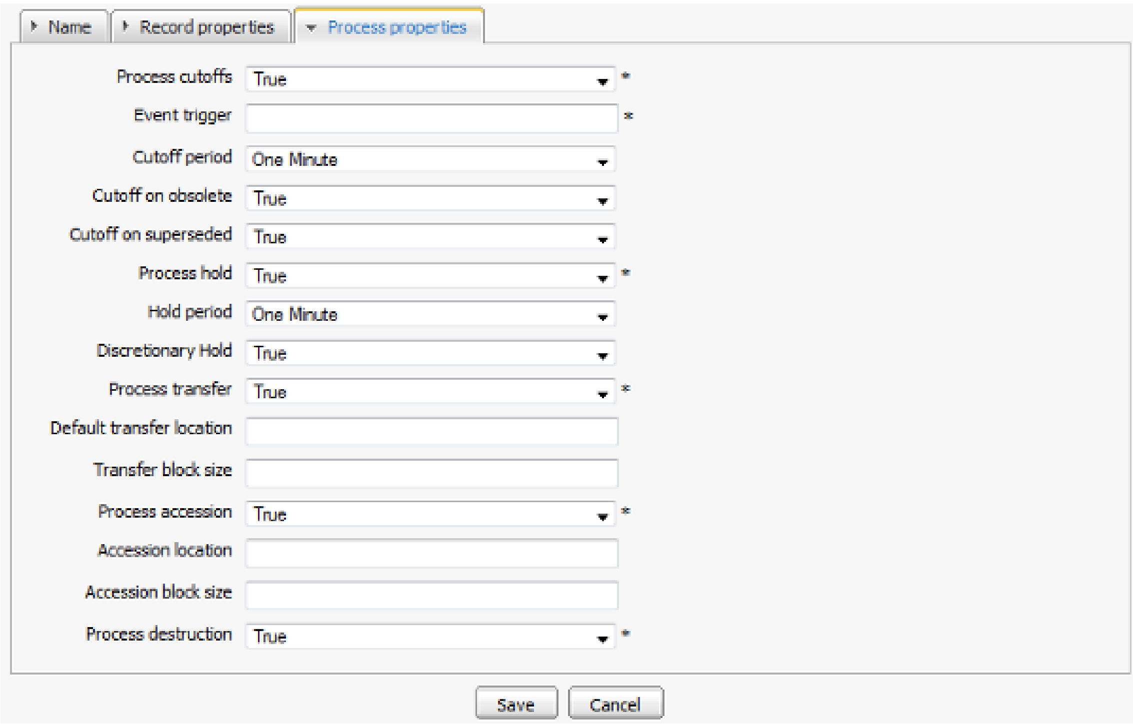


Table 4.15.

Field	Details
Process cutoffs	The boolean data type 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 data type 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 data type 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 data type 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 data type is used to determine how a record process will be transferred.
Default transfer location	The text data type is used to determine where a record is transferred by default.
Transfer block size	The float data type is used to determine in what size blocks for organizational purposes that is normally measured in Years.
Process accession	The boolean data type is flagged when a record which is held permanently must be ultimately transferred to the national records authority.
Accession location	The text data type is flagged to specify an area for the accession transfer.

Field	Details
Accession block size	The text data type is flagged to determine the blocks size for organizational purposes which is normally measured in years.
Process destruction	The boolean data type 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

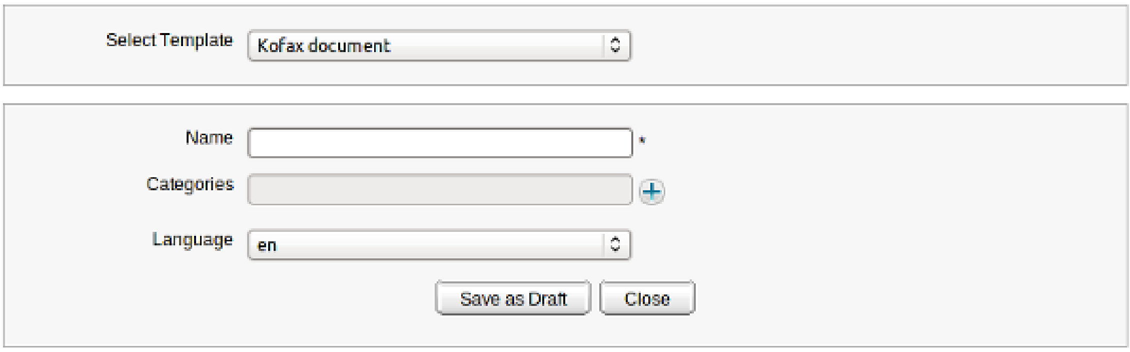
Records | Obsolete Records | Superseded Records | Vitals Records

	Record Id	Record name	Originator	Date Received	Originating Organization

Procedure 4.24. Create a new Kofax

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

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



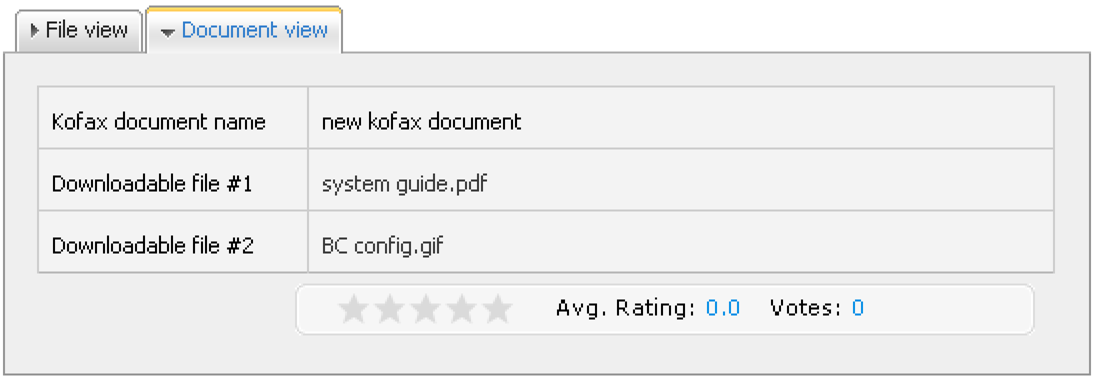
2. Enter a name for a Kofax document in the Name field. This field is required. Some special characters cannot be used in the Name field(@ # % & * ( ) “ ' : ; [ ] { } / !).

3. Select categories for the document by clicking the  icon.

4. Click **Save as Draft** to create the document.

A newly created kofax document will be displayed like this:

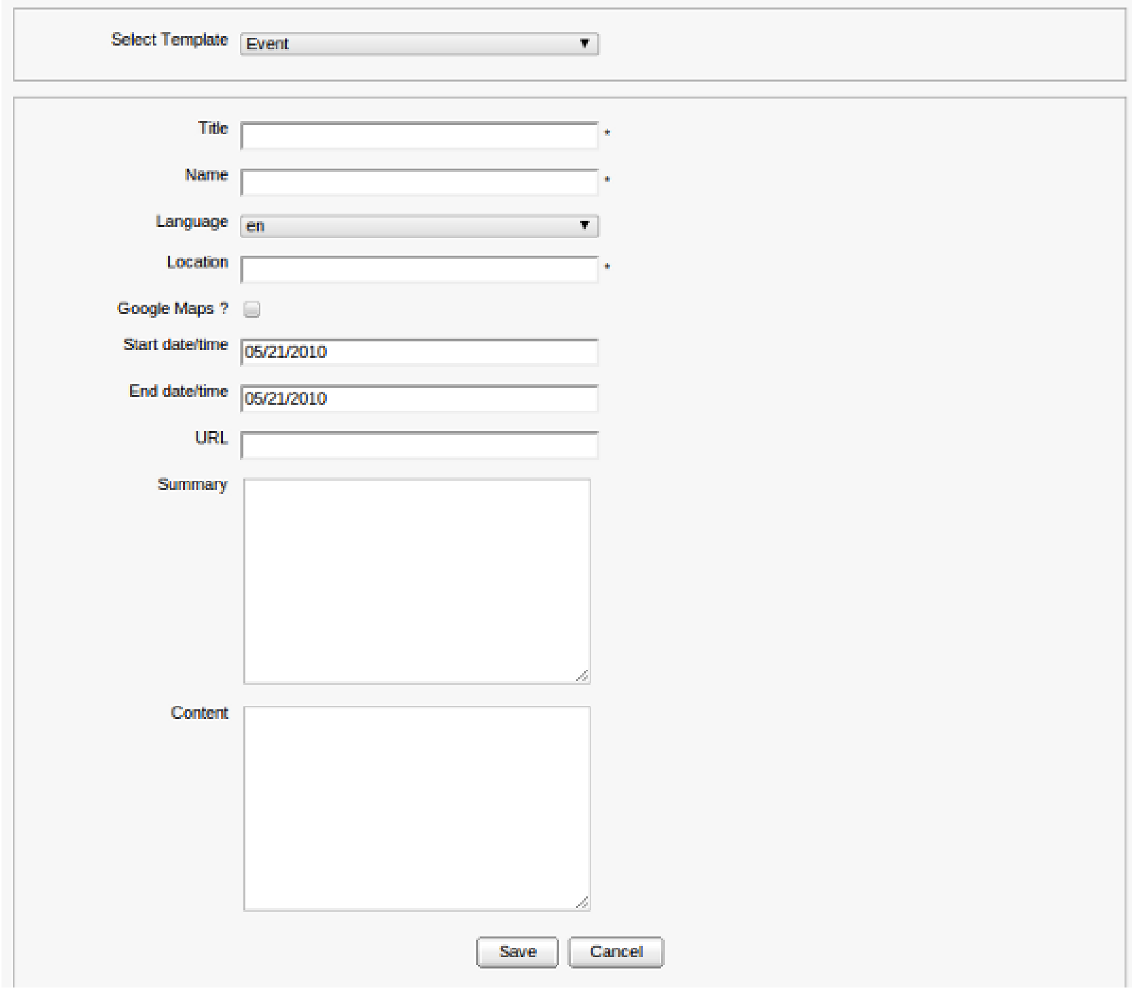
The **File View** tab is used to display all added nodes in that Kofax. All added files in that Kofax are also displayed in the **Document View** tab:



Procedure 4.25. Create new Event

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

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



2. Enter a title for the event.

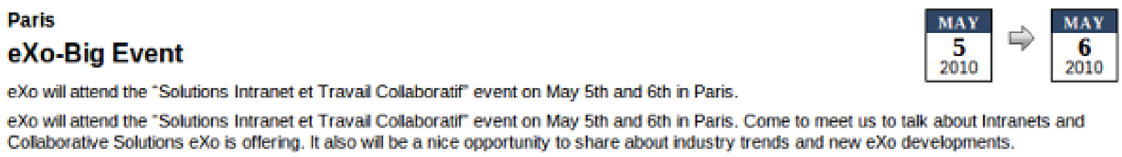
3. Enter the location where the event will take place in the **Location** field. Check the Google Maps checkbox if you want the location of the event shown on Google Maps.

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

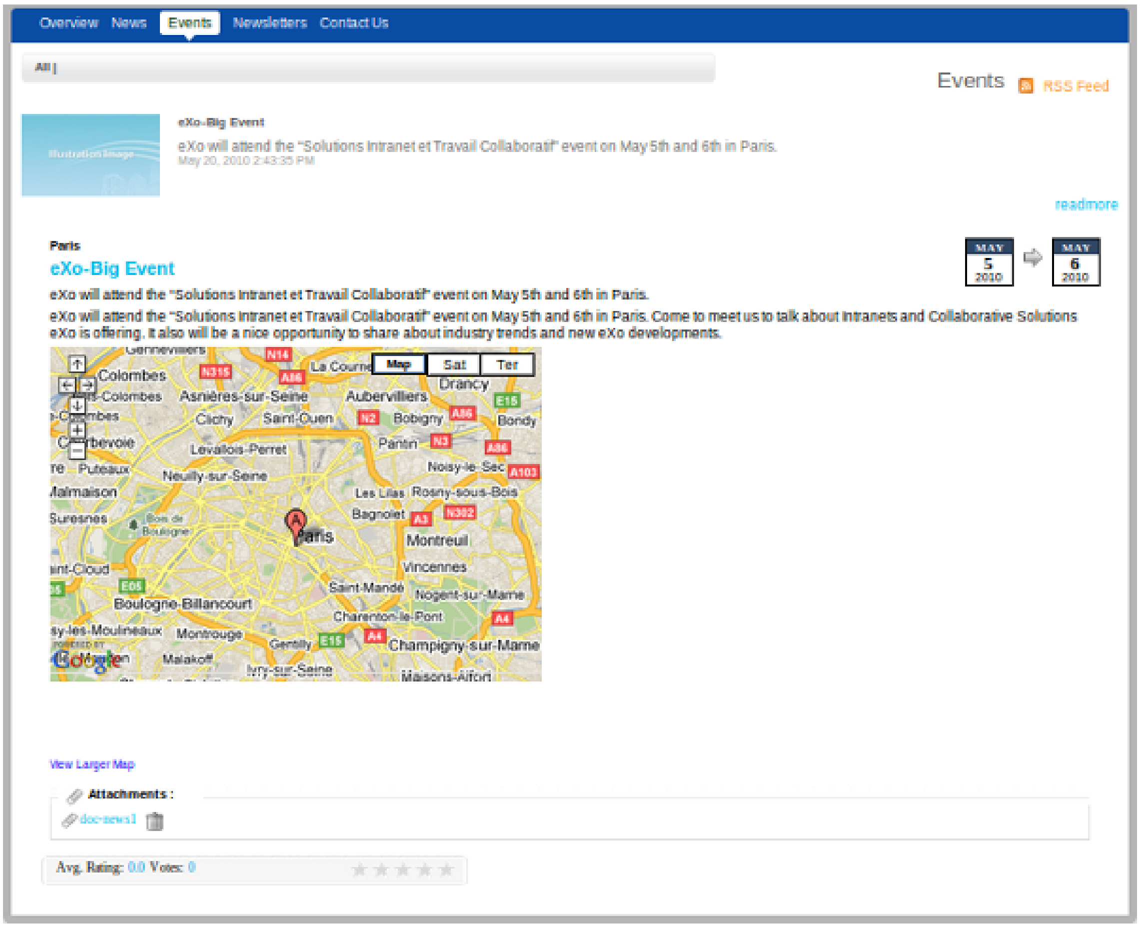
5. Fill the **Summary** and **Content** fields.

6. Click **Save** to commit the event.

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



The event will be displayed in a website as:



Note

When viewing the *nt:file* document nodes, such as File, CSS File, HTML file, JS file, Podcast, File Plan child nodes and uploaded file nodes, the following functions are disabled on the Action bar:

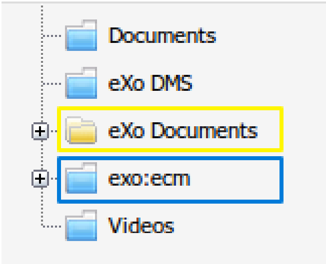
- Add Folder
- Upload File
- Add Content
- Import Node

4.7.4.3. Add a folder

You can create a document directly in a specific drive; however, adding documents to a specific folders allows more effective document management.

There are two types of folder:

- Content folder.
- Document folder.



In the default Portal 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 into a Content Folder.
- You can add a Document Folder into a Content Folder.
- You can add documents into a Content Folder.
- You can upload files into a Content Folder.
- You can import subnodes exported into a Content Folder.

Document folder

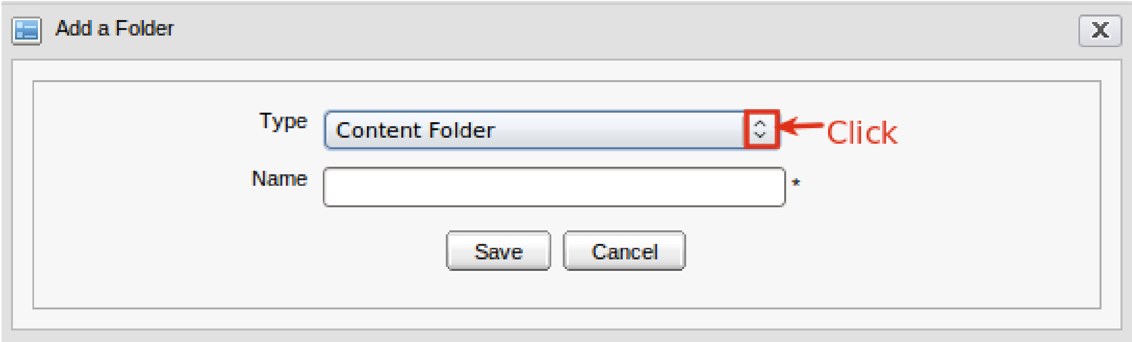
- You can add a new Document Folder into a Document Folder.
- You can add File, Podcast, File Plan documents into a Document Folder.
- You can upload files into a Document Folder.
- You **cannot** add a Content Folder into a Document Folder
- You **cannot** import an exported a Content Folder into a Document Folder.
- You **cannot** import an exported Article, Sample node, Kofax into a Document Folder.

Procedure 4.26. Create a folder

1. Select the path to create a folder.

2. Click the 

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



3. Click the  icon to see the type list and select a folder type.

4. Enter a name in the **Name** field. This field is required. You cannot use some special characters in this field (@ # % & * ( ) " ' : ; [ ] {} / !)

5. Click **Save** to create a new folder.

Duplicate Names

A folder can have the same name as an existing folder. When a new folder is created with the same name with another, the new name will have an index number added (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.

4.7.4.4. Add translations to a document

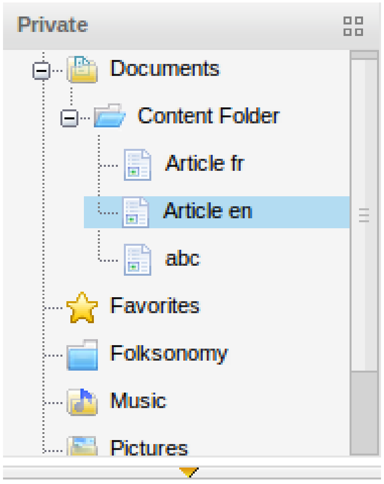
This function enables users to add multiple languages for a document. This action is similar to adding a language.

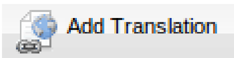
By default, the **Add translation** button is not displayed on the action bar.

Enable this function by navigating to **Administration** → **Content Presentation** → **Manage Views** . See *Section 5.2.2.3, “Manage Views”* to know how to add the **Add translation** button to the tabs on the action bar in Content Explorer.

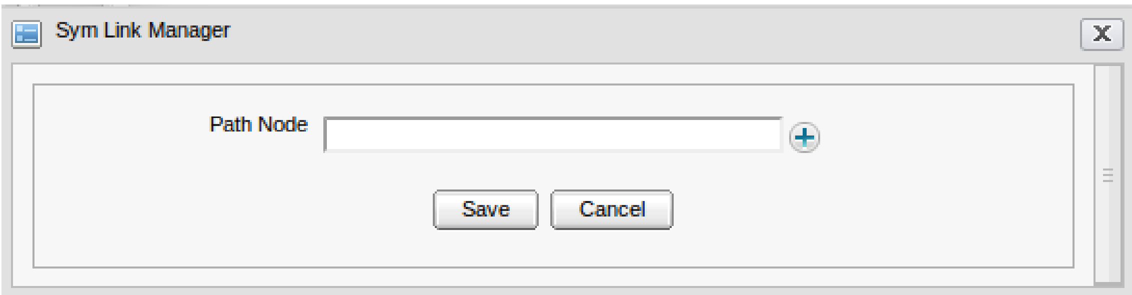
Procedure 4.27.

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

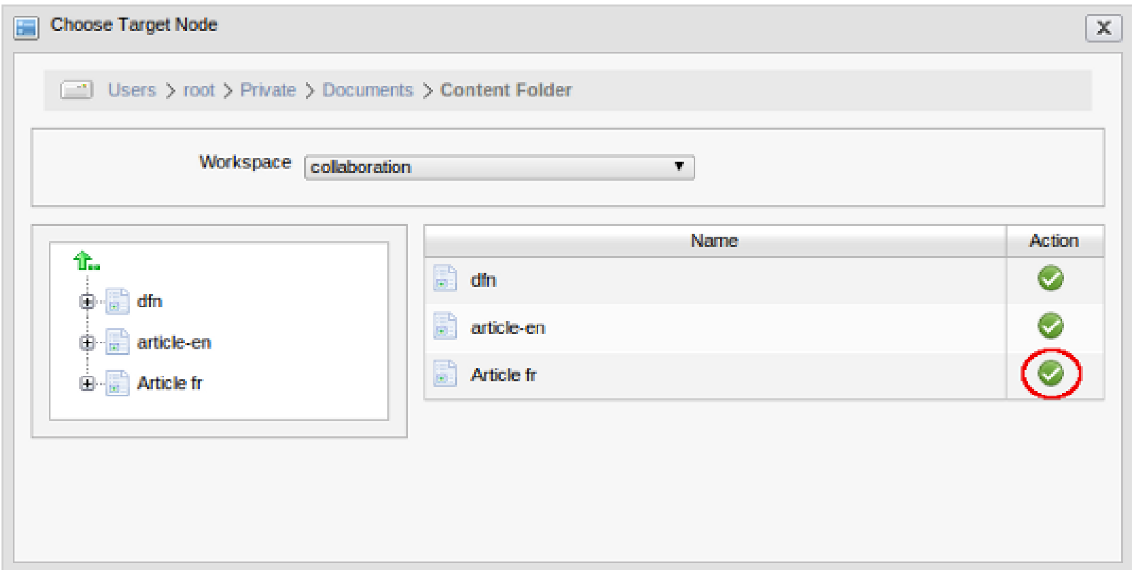


2. Click the 

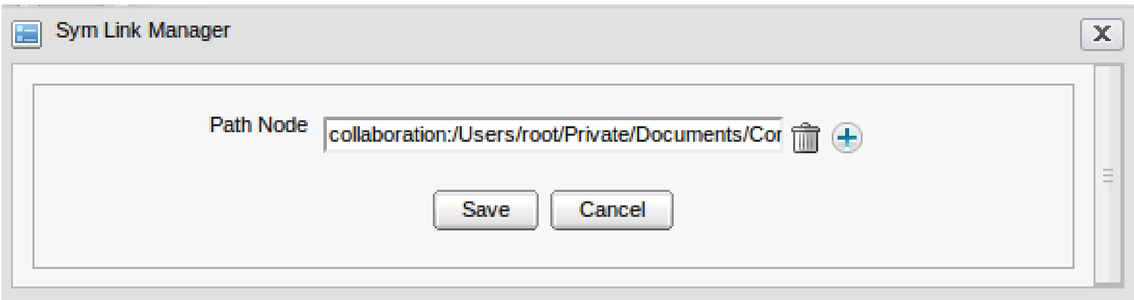
button on the action bar. The **Symlink Manager** will appear:



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

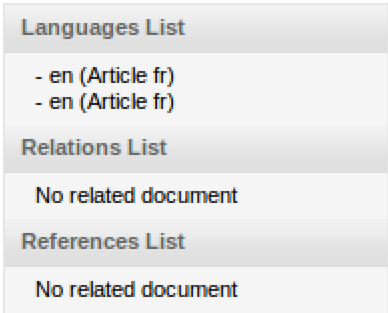


4. After you have selected the document, click **Save** on the **Symlink Manager** form:



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.



4.7.4.5. Add Symlink

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

Do the following to add a Symlink:

Procedure 4.28.

1. Select a document that you want to point a Symlink to.

2. Click the 

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

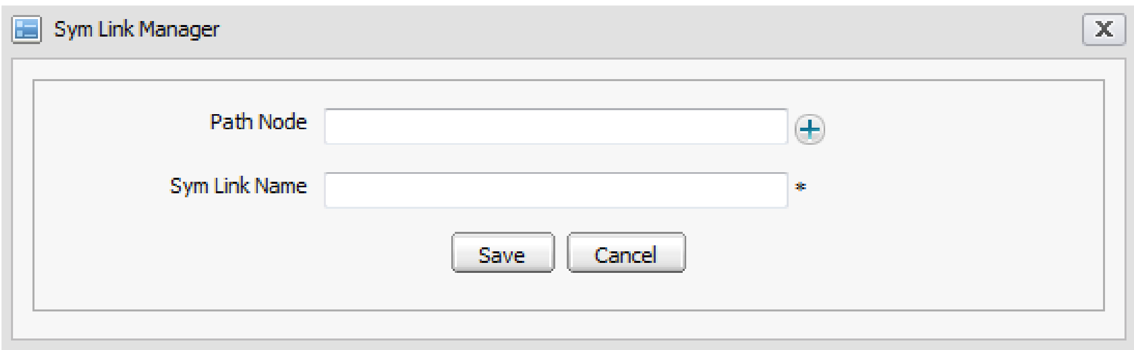
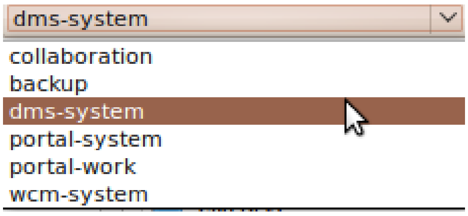


Table 4.16.

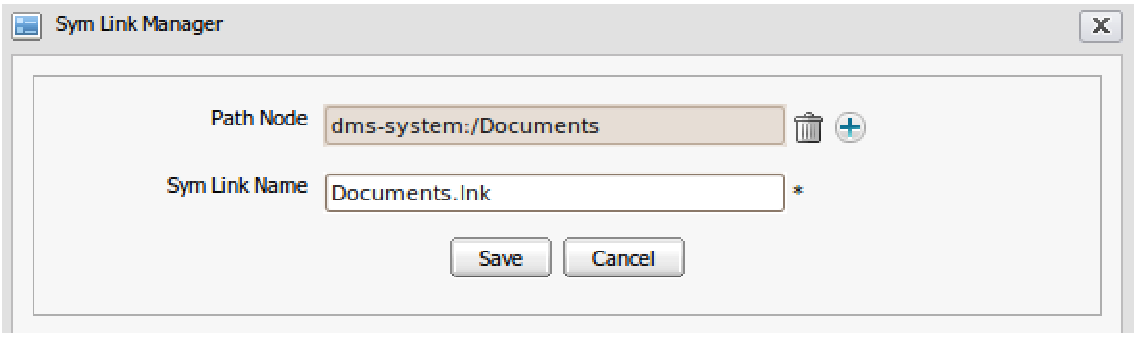
Field	Details
Path Node	The path of a link
Symlink name	The name of the link.

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

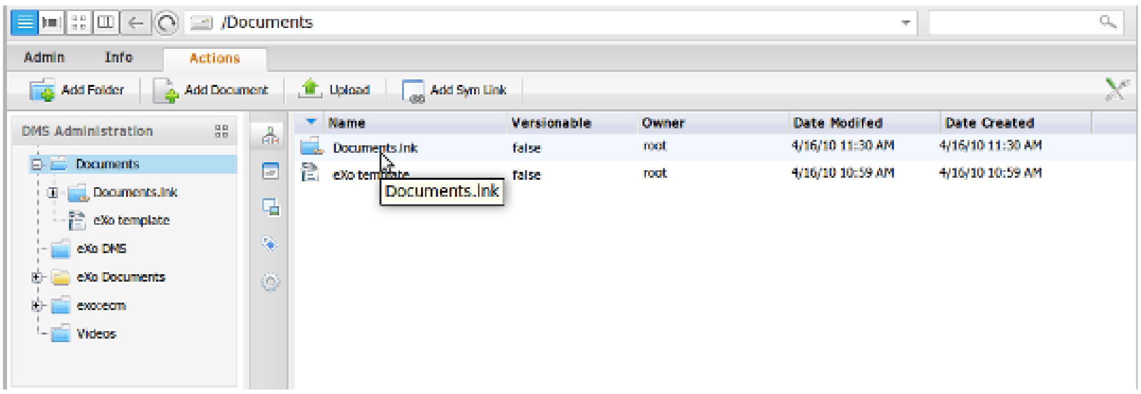
4. Choose the workspace which contains the node that you want to add a Symlink:



5. Click the  icon in the row of the node that you want to add, the path of 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.



4.7.4.6. Comment

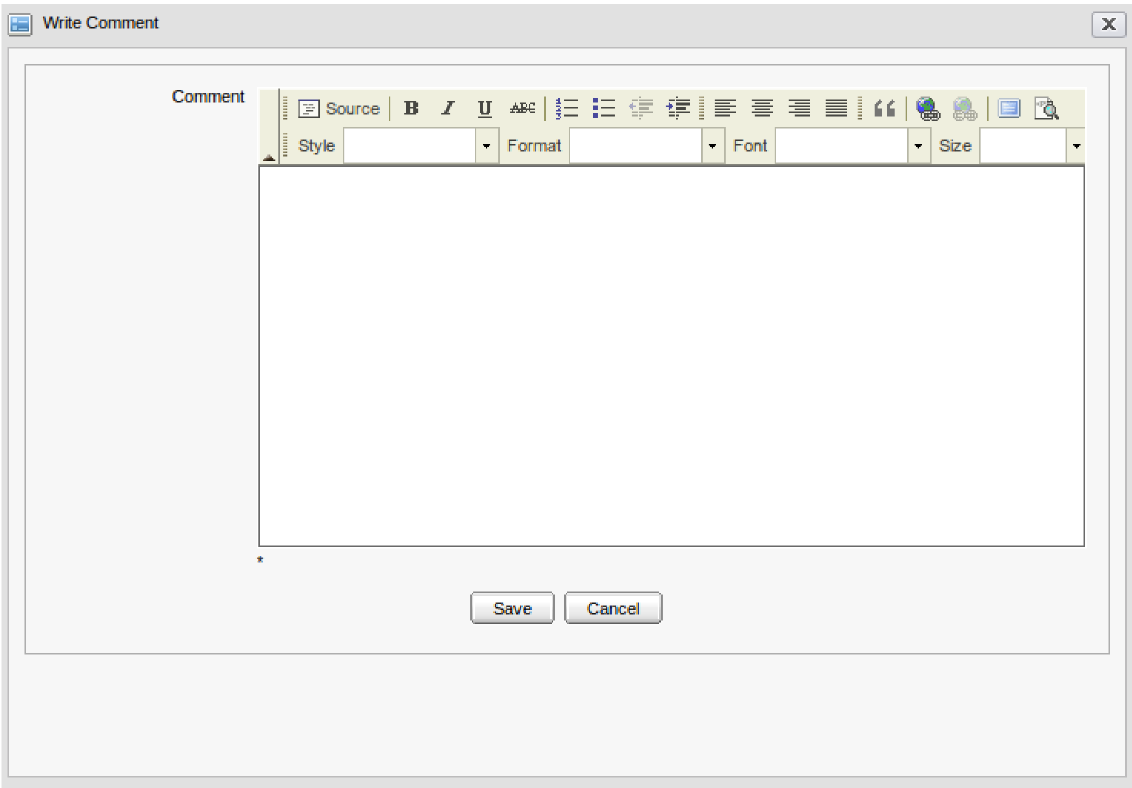
This function is used to comment on a document (Note: you cannot comment for a *File Plan* document).

Procedure 4.29.

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

2. Click the  button on the action bar.

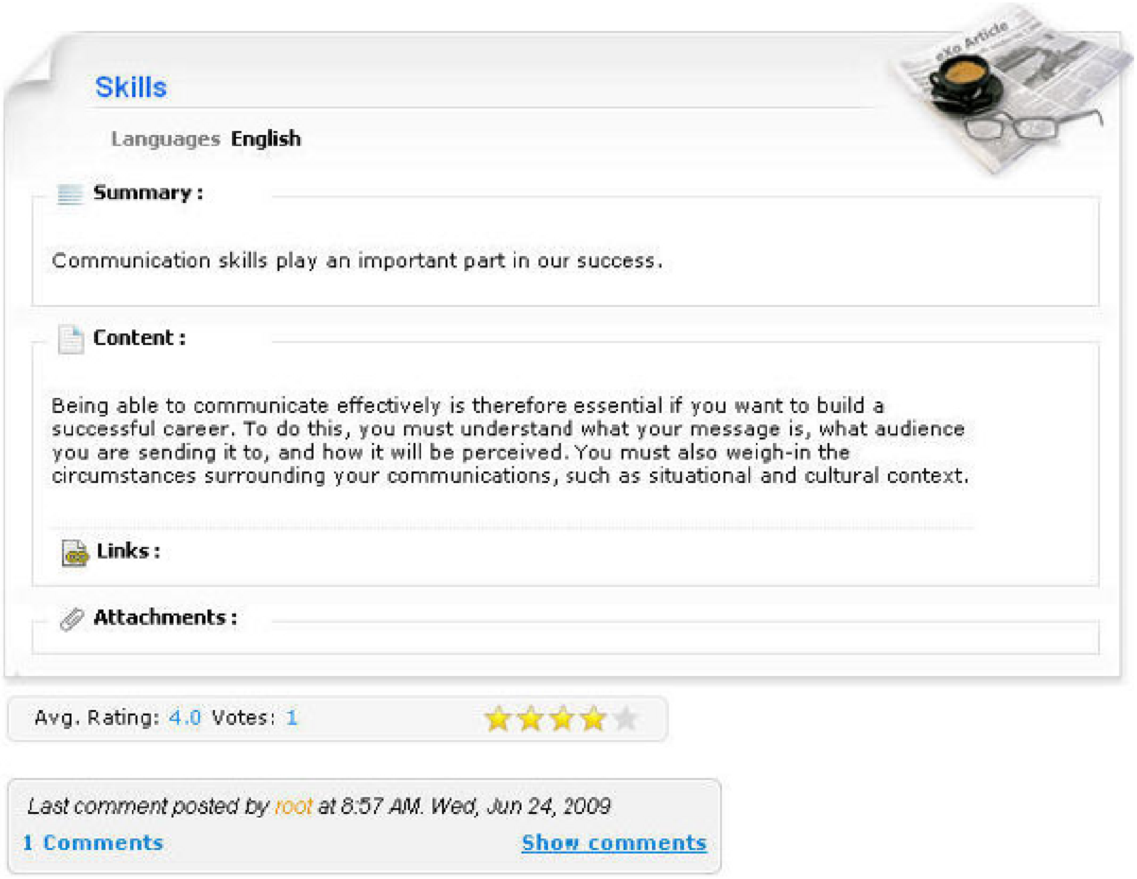
   The **Add Comment** form appears:



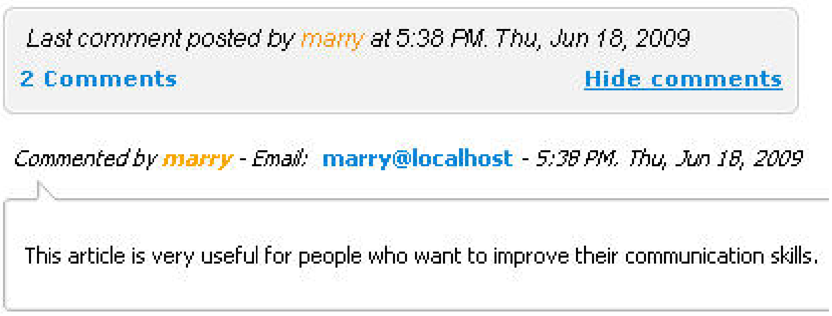
3. Add your comment in the **Comment** field.

4. Click**Save**.

Comments are shown at the bottom of the document:



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



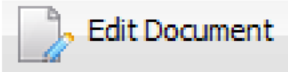
You can edit your comment by clicking the  icon or delete it by clicking the  icon.

4.7.4.7. Edit a document

There are two ways to edit a document.

Procedure 4.30. Method One

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

2. Click the 

button on the action bar.

Or:

Procedure 4.31. 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.

4.7.4.8. Export nodes

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

Procedure 4.32.

1. Select a node that you want to export.

2. Click the 

button on the action bar to show the **Export Node** form:

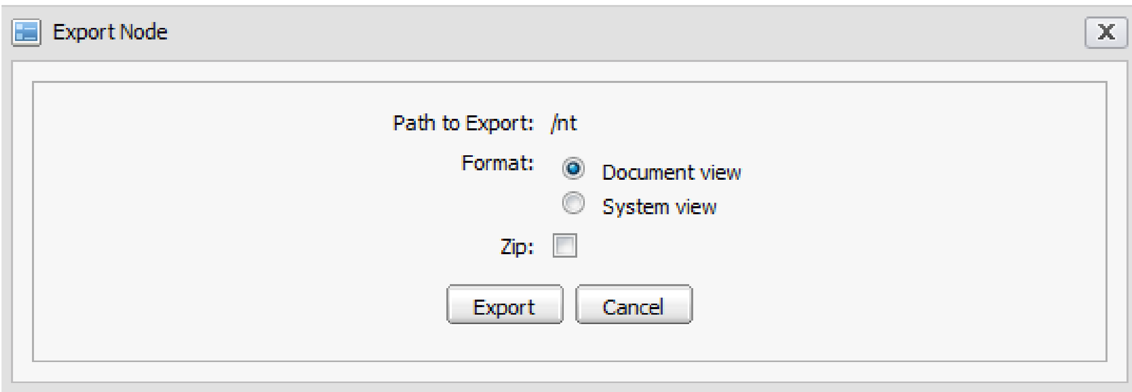


Table 4.17.

Fields	Details
Path to Export	The path of the node being exported. This field will be pre-populated.

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

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.

4.7.4.9. Import Nodes

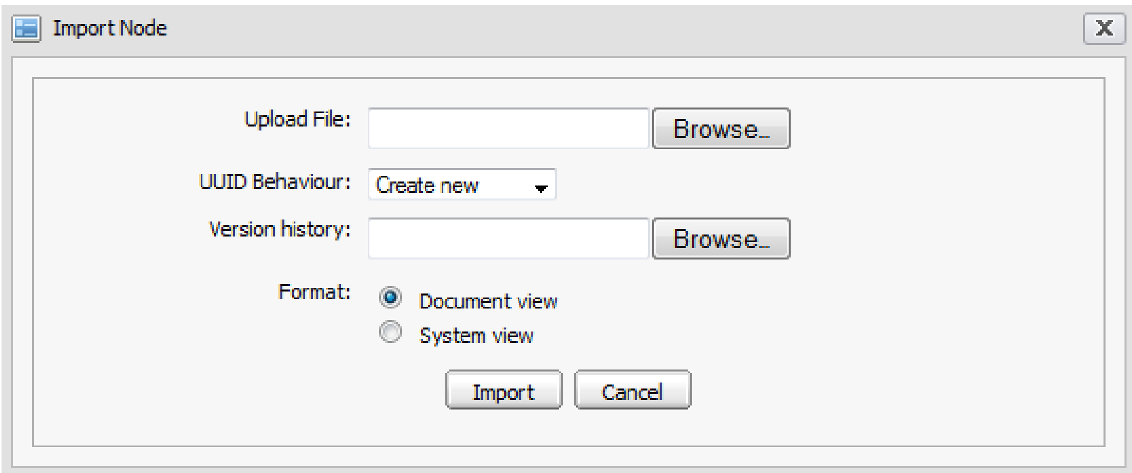
Nodes that are in the `.xml` file format can be imported in to the JCR Explorer system.

Procedure 4.33.

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

2. Click the 

button 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 cannot 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.

4.7.4.10. Manage Actions

4.7.4.10.1. Add an action

Procedure 4.34.

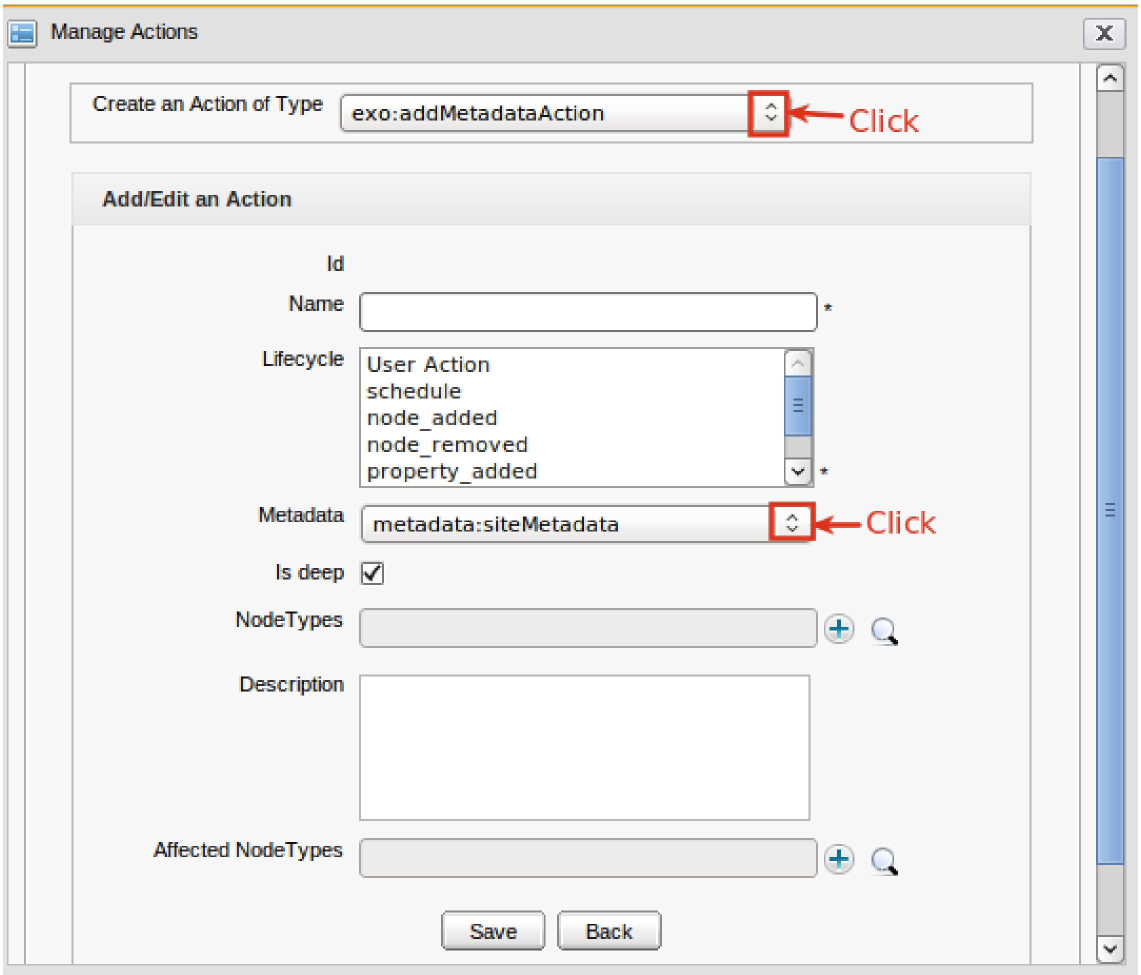
1. Select the node you want to add an action to.

2. Click the 

button 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.



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

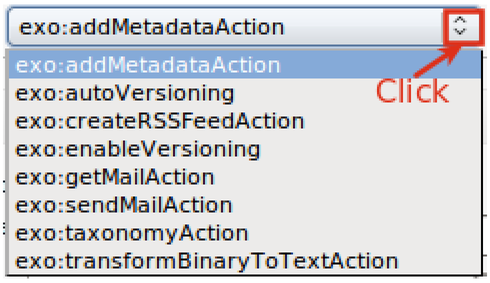


Table 4.18.

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.

Field	Details
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 *.pdf* or *.doc* file types to plain text.

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

Table 4.19.

Field	Details
ID	The Id of action. This field is created automatically and cannot be modified.
Name	The name of this action. This name is internal to the JCR explorer.
Lifecycle	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 sub-folder in the folder when the document or the sub-folder is moved. • **Schedule**: the action is done at specific time. There are 2 schedule lifeless types: period and cron. (See more about Schedule lifecycle).

Field	Details
	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 lifestyles, 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.

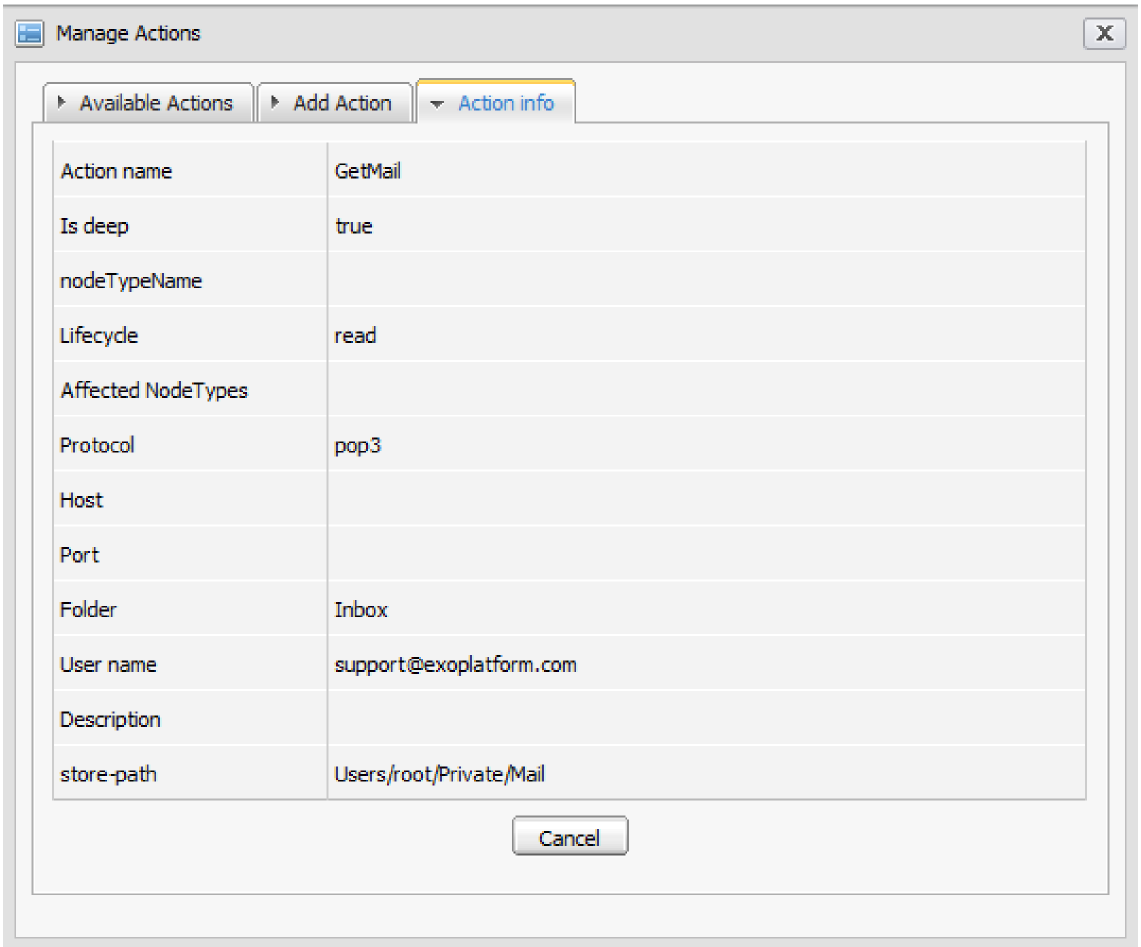
4.7.4.10.2. View Actions

Procedure 4.35.

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

2. Click the  icon that corresponds to the action you want to view.

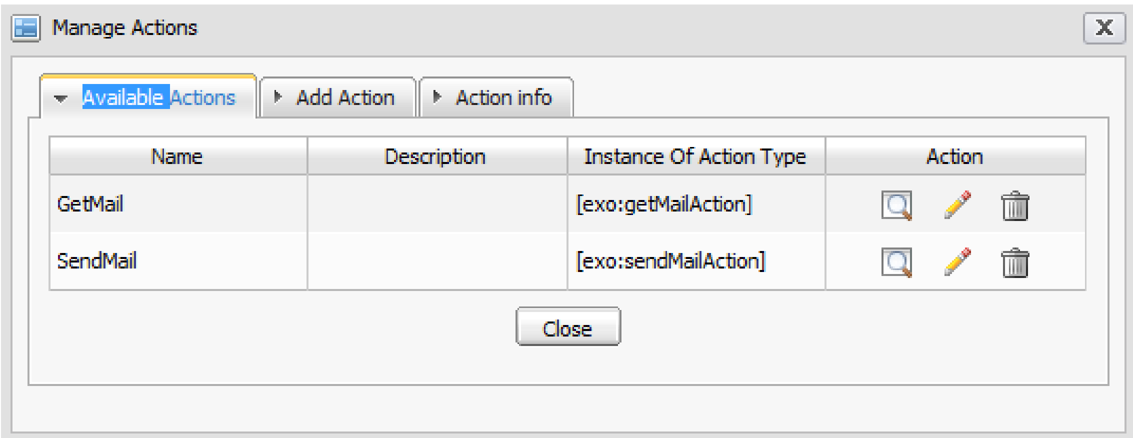
   The details will be displayed in the **Action info** tab:



4.7.4.10.3. Edit an action

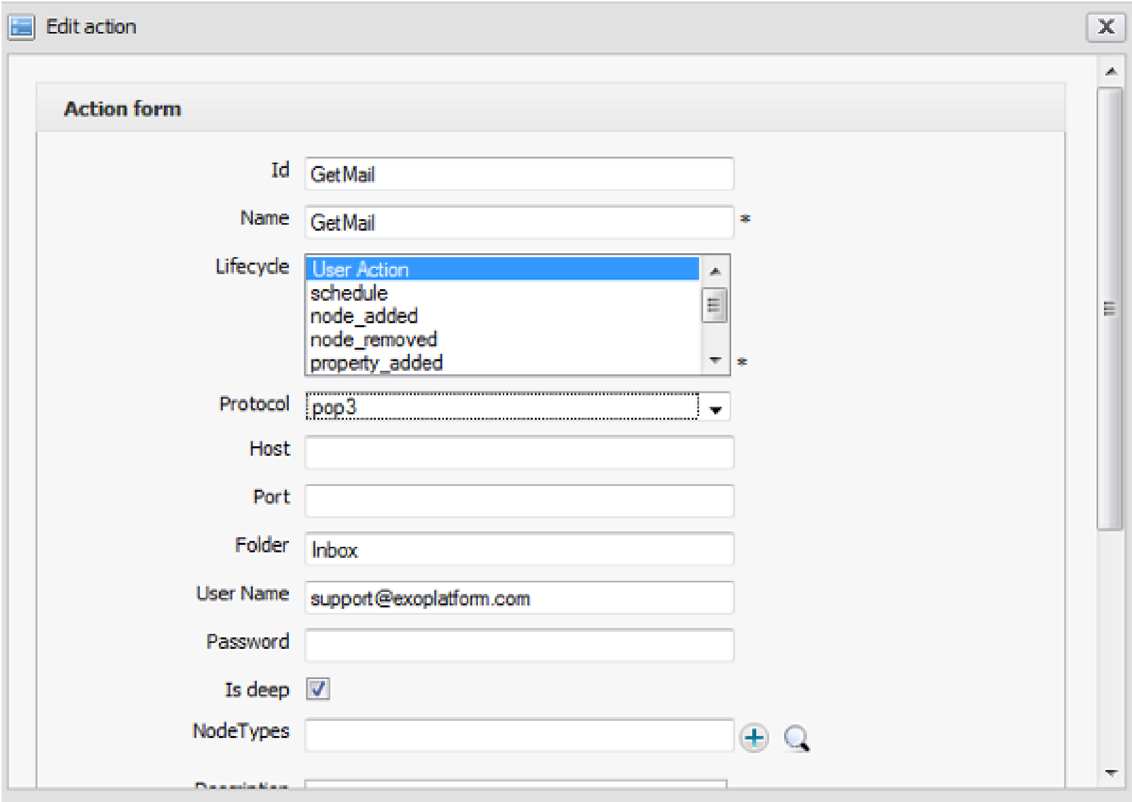
Procedure 4.36.

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



2. Click the  icon that corresponds to the action you want to modify.

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

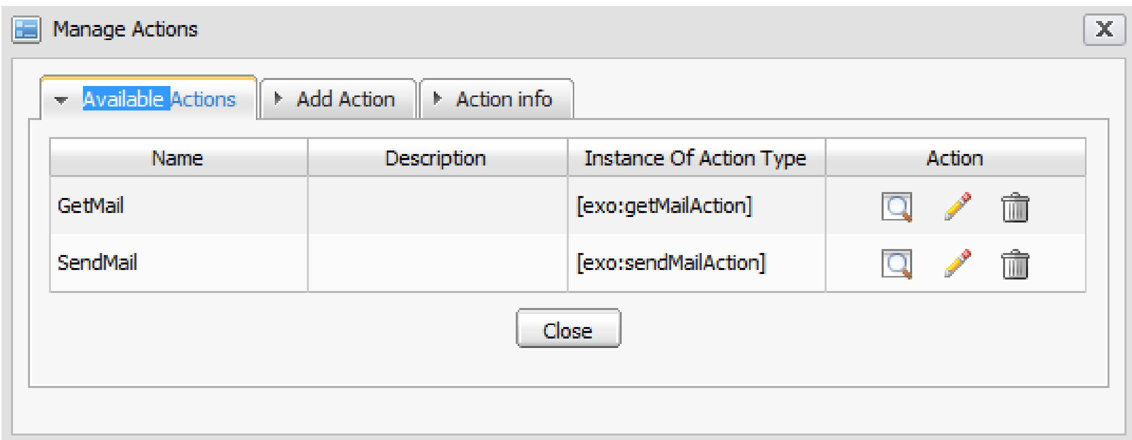


4. Click **Save** to commit the changes.

4.7.4.10.4. Delete an action

Procedure 4.37.

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.

4.7.4.11. Manage Auditing

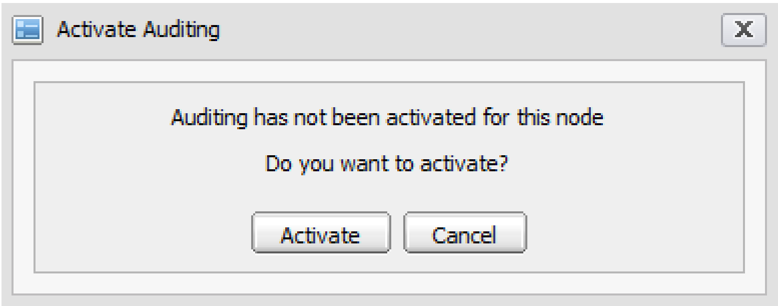
This function logs property changes in nodes.

Procedure 4.38.

1. Select a node.

2. Click the 

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

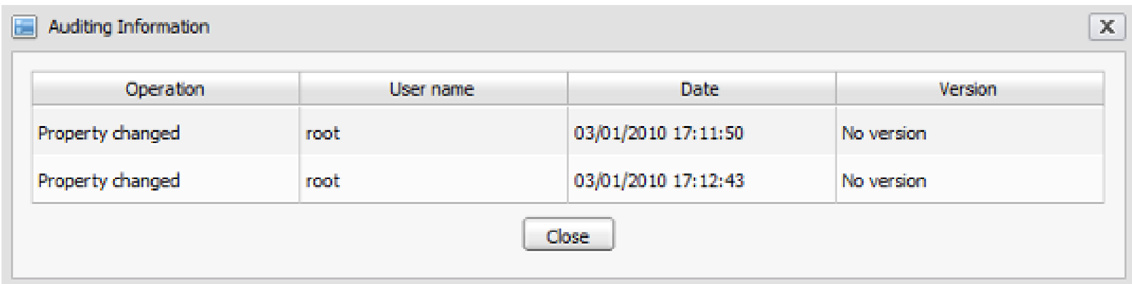


3. Click **Activate** to activate auditing on the selected node.

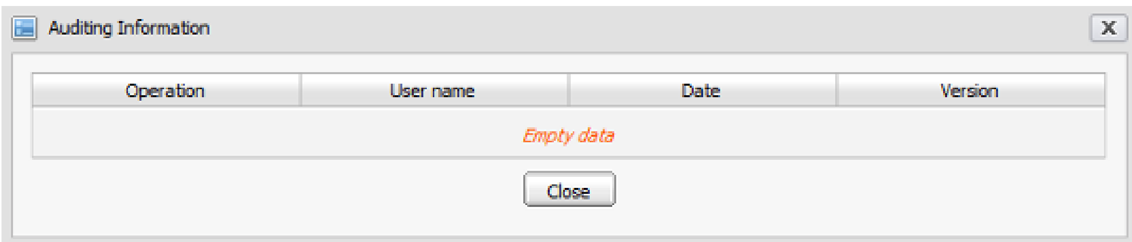
4. Click the 

button again to view audit information for the selected node.

   The **Auditing Information** list appears.



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



4.7.4.12. Manage Categories

4.7.4.12.1. Add a category for a node

You can add categories to document type nodes only:

Procedure 4.39. Add a category

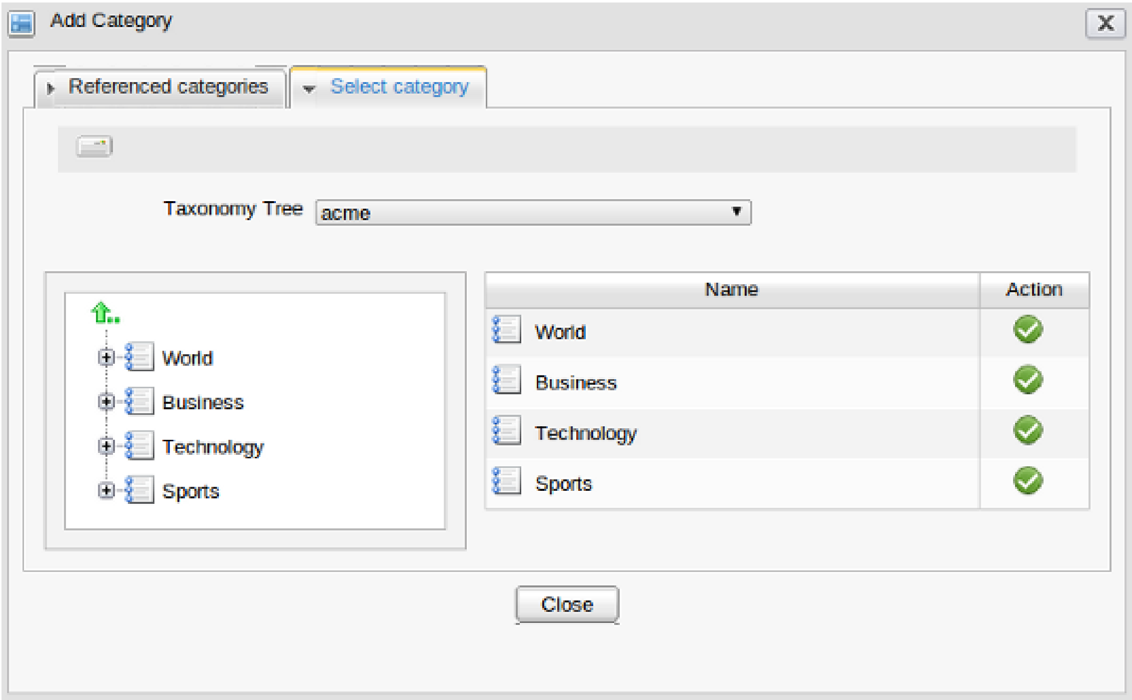
1. Select the node that you want to add a category to.

2. Click the 

button on the action bar.

   The **Add category** form appears.

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



4. Click the  icon 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 4.40. View a category

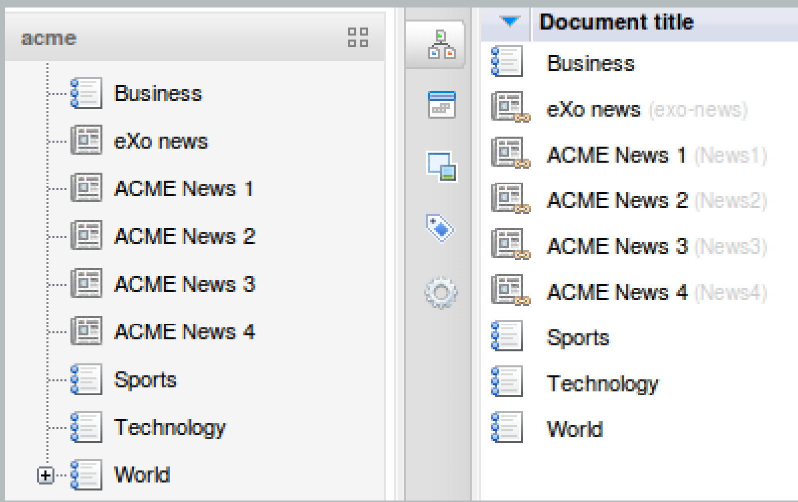
1. Go to the drive that contains the category you have added. There will be a list of categories available.

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.



4.7.4.12.2. Delete a Category

Procedure 4.41. Delete a category

1. Select a categorized node.

2. Click the 

button.

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

4. Click the  icon that corresponds to the category you want to delete.

4.7.4.13. Show/Hide a content

Nodes can be hidden or revealed as desired.

Procedure 4.42. Hide a Node

1. Select the node you want to hide.

2. Click the 

button 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 the 

button again.

4.7.4.14. Manage Publications

This function is used to manage node publication.

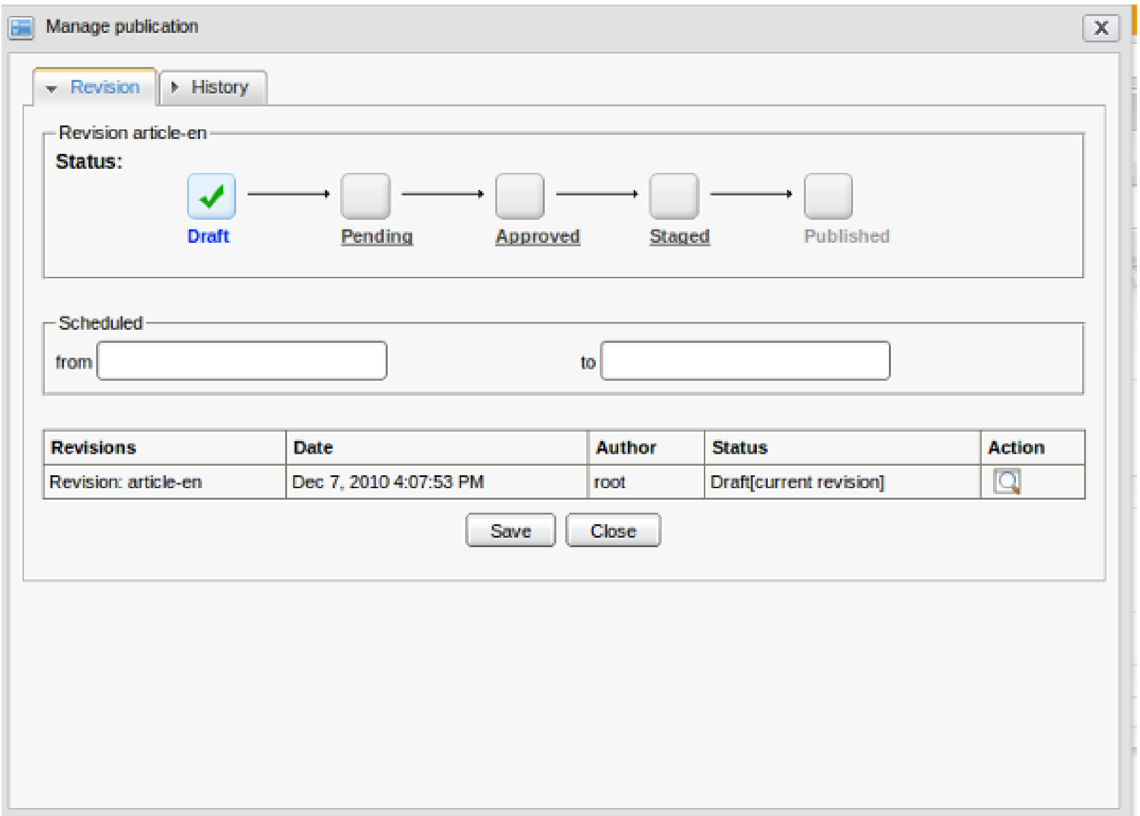
Procedure 4.43. Manage Publications

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

2. Click the 

button 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 the  icon to view the content of the node or click the  icon to restore a version (refer to *Section 4.7.4.16, “Manage Versions”* for information about versioning).

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

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

> **Important**
>
> See *Section 4.4.3, “Publication Process”* to understand more Manage Publication

4.7.4.15. Manage Relations

You can use this function to create relationships between nodes

4.7.4.15.1. Add a relation

Procedure 4.44. Add a relation

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

2. Click the 

button on the action bar.

   The **Add relation** form appears.

3. 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**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.

4.7.4.15.2. Delete a relation

Procedure 4.45. Delete a relation

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

2. Click the  button on the action bar.

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

4. Click the  corresponding to the relation you want to remove.

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

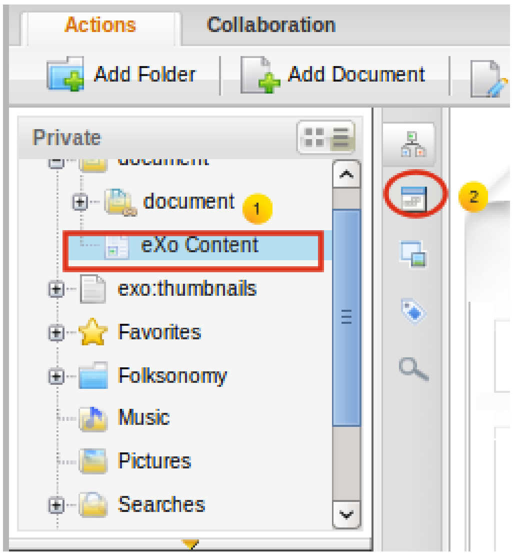
   The related document will be removed from the list.

4.7.4.15.3. View Relations

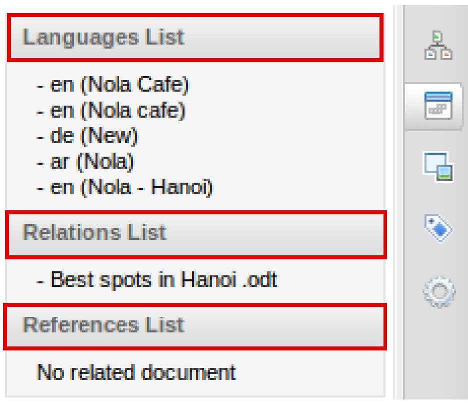
Procedure 4.46. View Relations

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.

4.7.4.16. Manage Versions

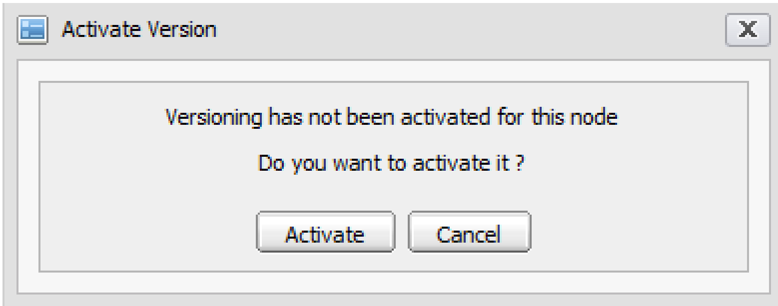
4.7.4.16.1. Add versions for nodes

Procedure 4.47. Add version

1. Select a node to add a version to.

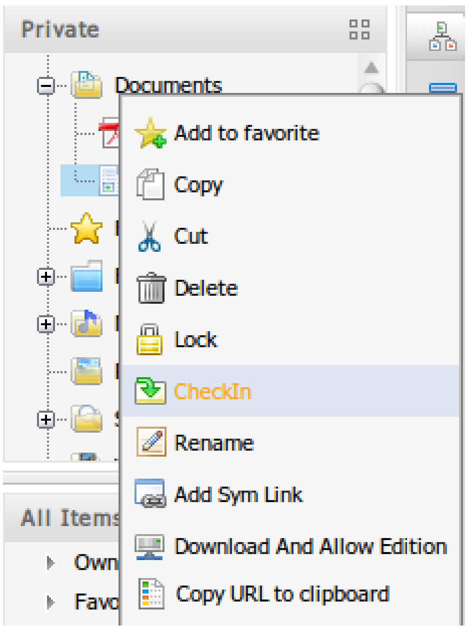
2. Click the  button on the action bar.

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

The node selected in **Step 1** 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**.

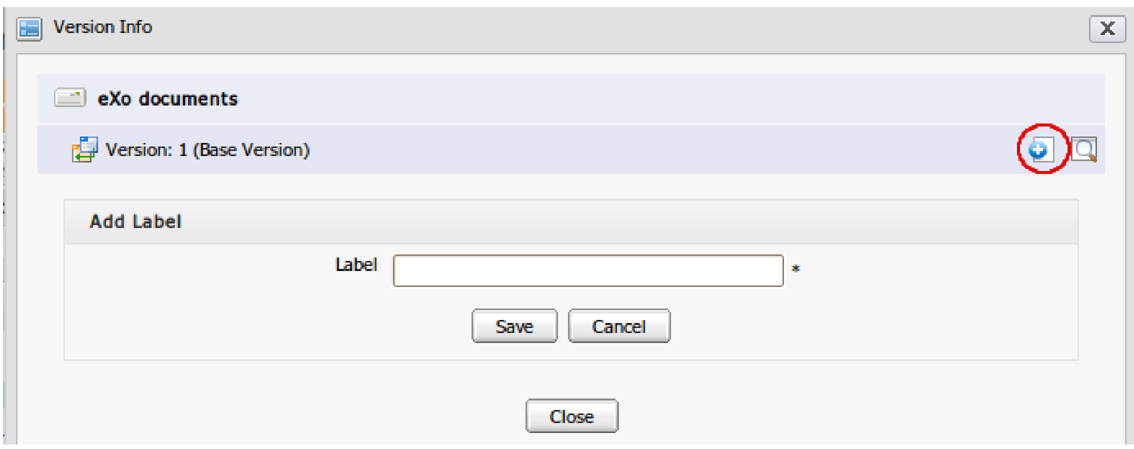
4.7.4.16.2. Add and Remove labels for Versions

Procedure 4.48. Add a label

1. Select a versioned node.

2. Click the  button on the action bar.

3. Click the  icon 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 cannot use special characters such as @, #, $.

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

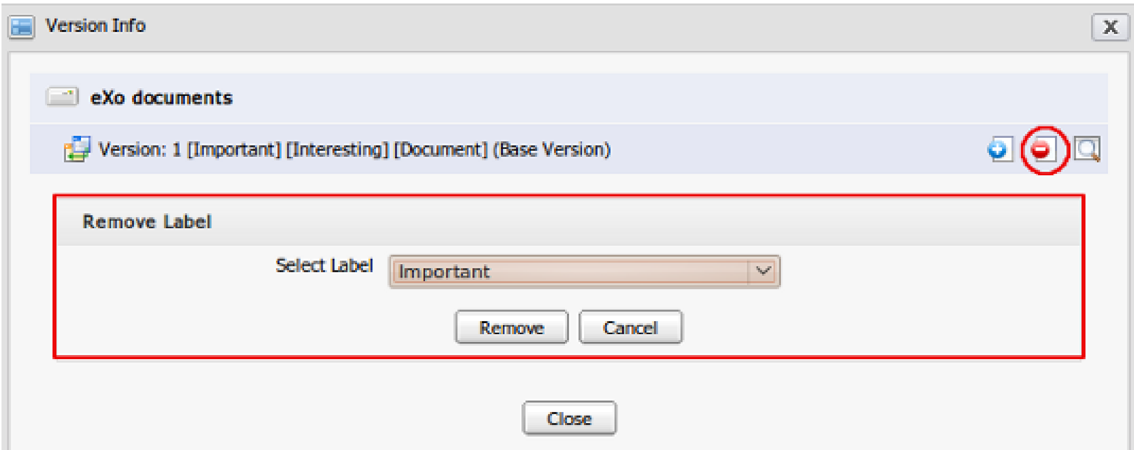
Procedure 4.49. Remove a label

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

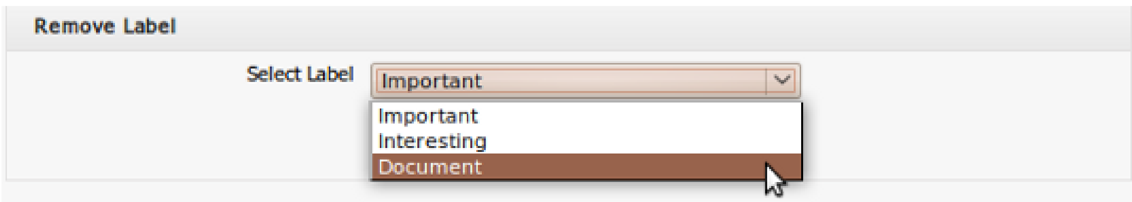
2. Click the 

button on the action bar.

3. Click the  icon 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.

4.7.4.16.3. View versions

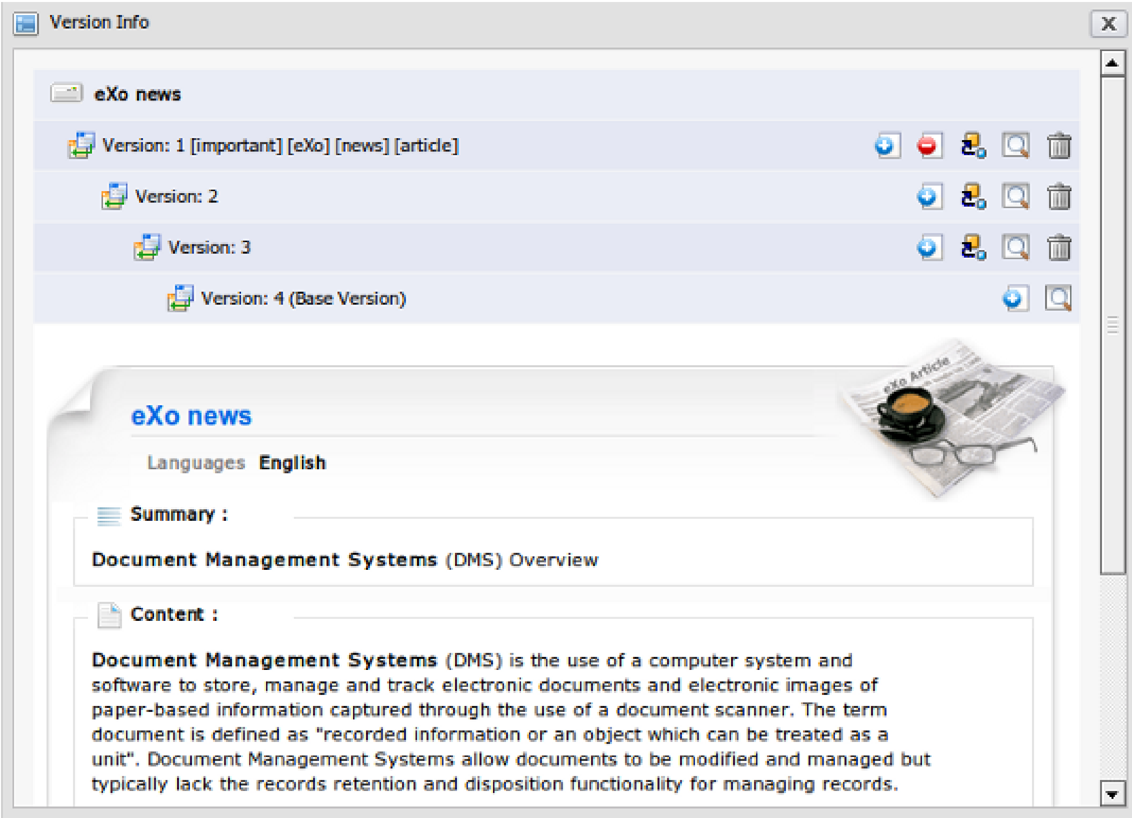
Procedure 4.50.

1. Select a versioned node.

2. Click the 

button.

3. Click the  icon to see the current versions of the selected node.

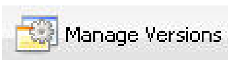


> **Folder Nodes**
>
> Version viewing is not supported on folder nodes.
>
> If you click the  icon while the selected node is a folder, a message to this effect will appear.

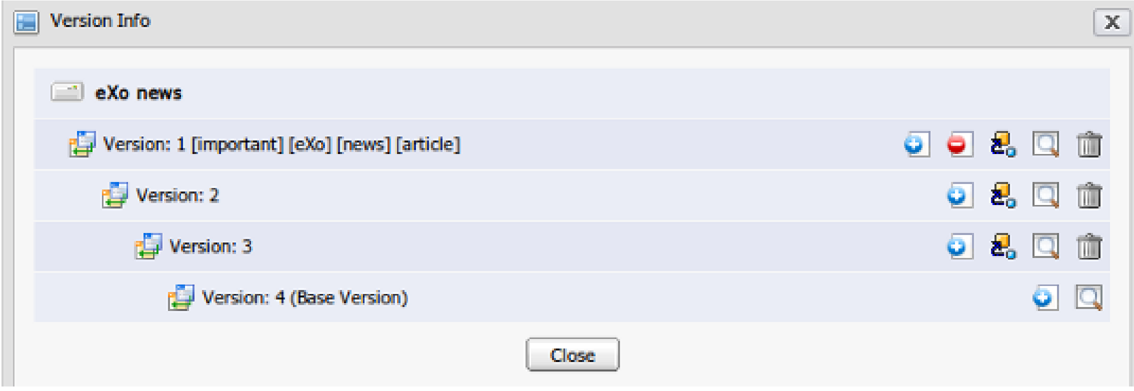
4.7.4.16.4. Restore versions

Procedure 4.51.

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

2. Click the 

button.



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

4. Click the  icon to restore the selected version

4.7.4.16.5. Delete versions

Procedure 4.52.

1. Select a node with at least two versions:

2. Click the 

button.

3. Click the  icon corresponding to the version you want to delete.

   A confirmation message will appear.

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

> **Base Versions**
>
> You cannot delete a base version.

4.7.4.17. Multi Languages

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

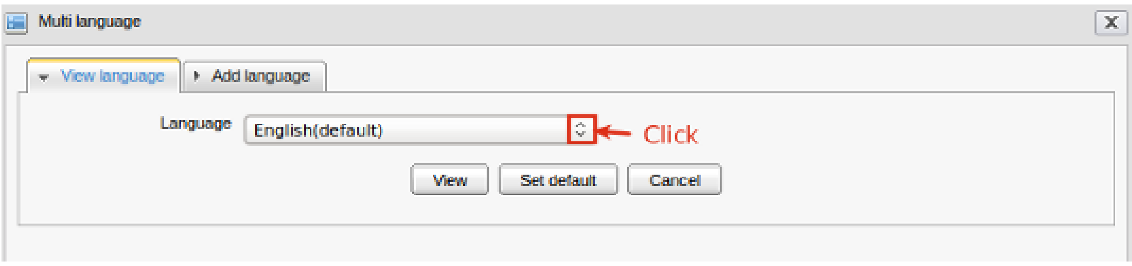
Procedure 4.53.

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

2. Click the 

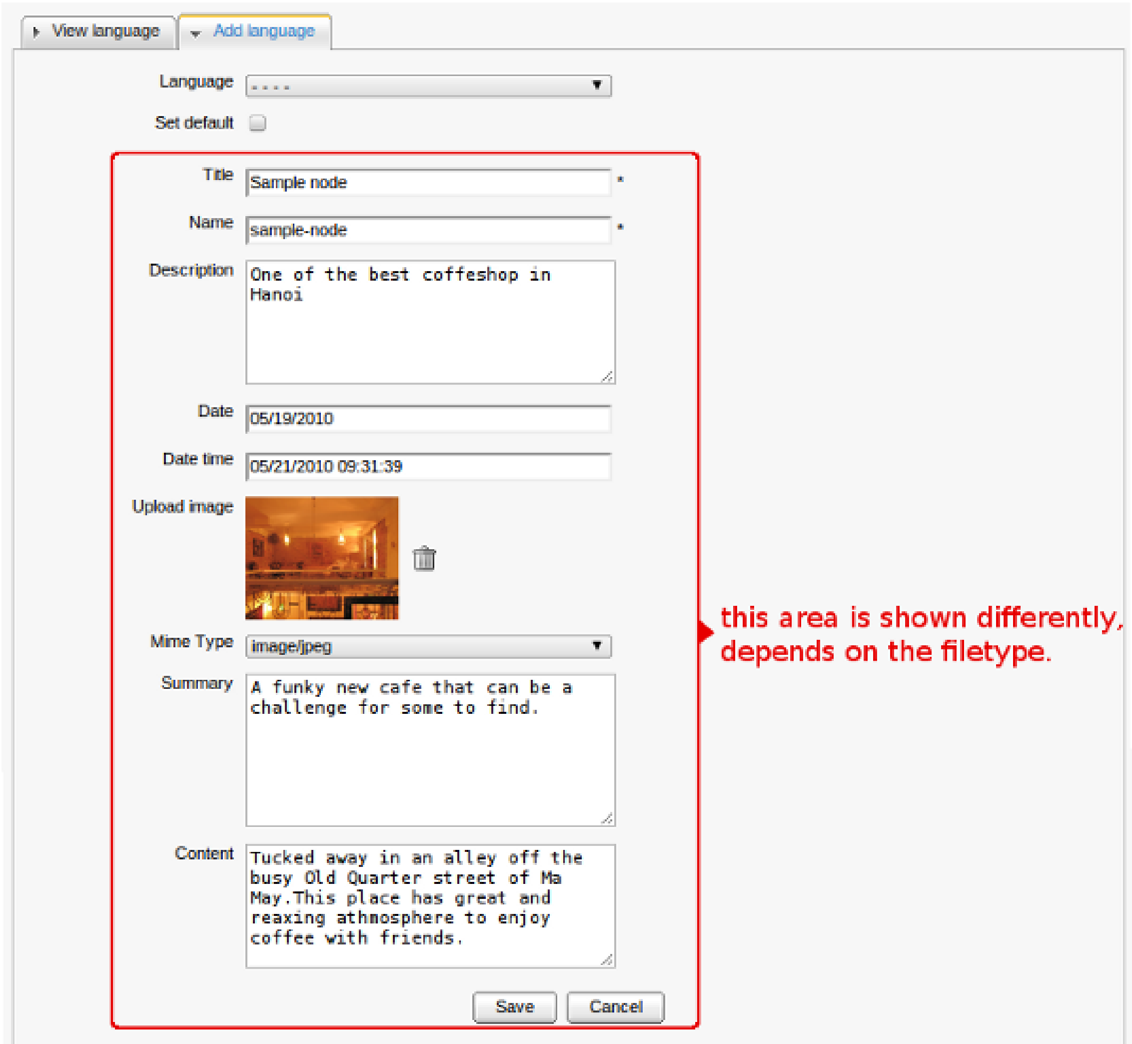
button on the **Action** bar.

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



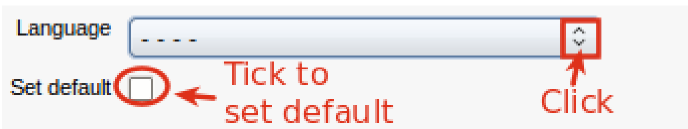
   The **View language** tab contains a list of all languages. The default language for the document will be automatically populated.

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:



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.



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

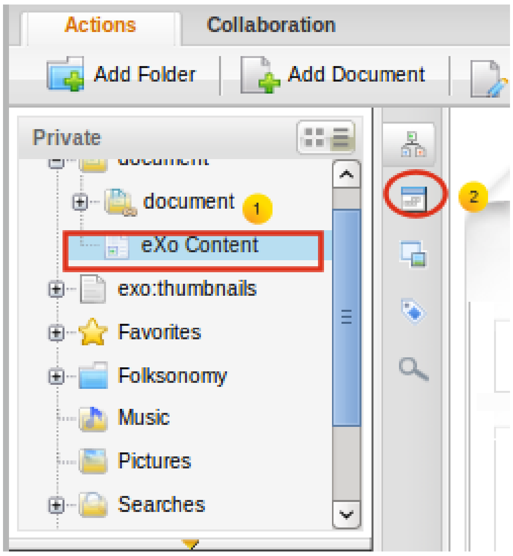
5. Click**Save**, you will be returned to the **View language** tab. Your selected language is now added to the **Language** field:

   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.

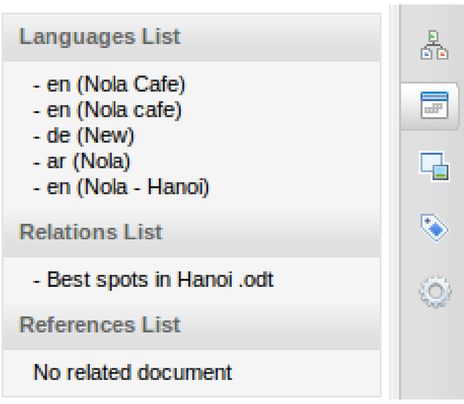
To view the languages list of a document, do the following:

Procedure 4.54. 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 the **Languages List**.

For more details about Relations, refer to*Section 4.7.4.15.3, "View Relations"*.

> **File Plan Language**
>
> You cannot add multiple languages to a File Plan or any subnodes of a File Plan.

4.7.4.18. 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.

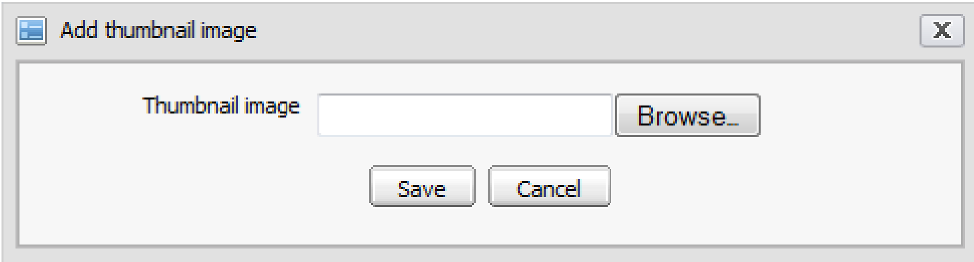
To overload a thumbnail, do the following

Procedure 4.55. Overload thumbnails

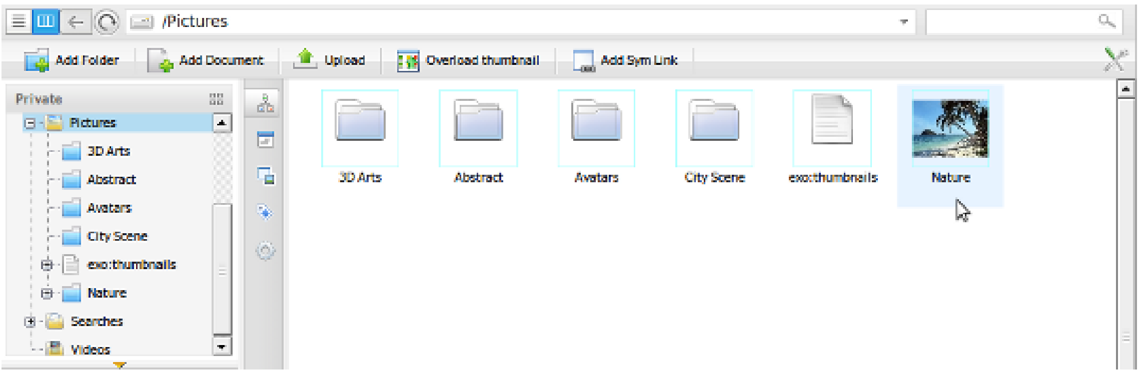
1. Select the folder you wish to overload with a thumbnail image.
2. Click the 

button 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.



4.7.4.19. 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 4.56. 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.

4.7.4.20. Approve a 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 4.57. 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 5.2.2.3, "Manage Views"* to know how to add the **Approve Content** button to the tabs on the action bar in Content Explorer.

4.7.4.21. Publish a content

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

Do the following:

Procedure 4.58. Publish a content

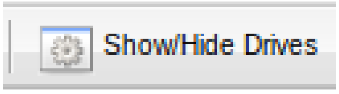
1. Select a content that you want to publish.
2. Click the **Publish Content** button on the action bar. The content will be published as the schedule that you set up.

> **Note**
>
> The **Publish Content** button is only visible to 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 5.2.2.3, "Manage Views"* to

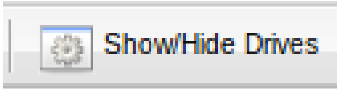
know how to add the **Publish Content** button to the tabs on the action bar in Content Explorer.

4.7.4.22. Show Drives

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

To show drives, click the 

button on the action bar.

To hide drives, click the 

button again.

4.7.4.23. Show JCR Structure

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

Show the JCR structure

1. Select a document.

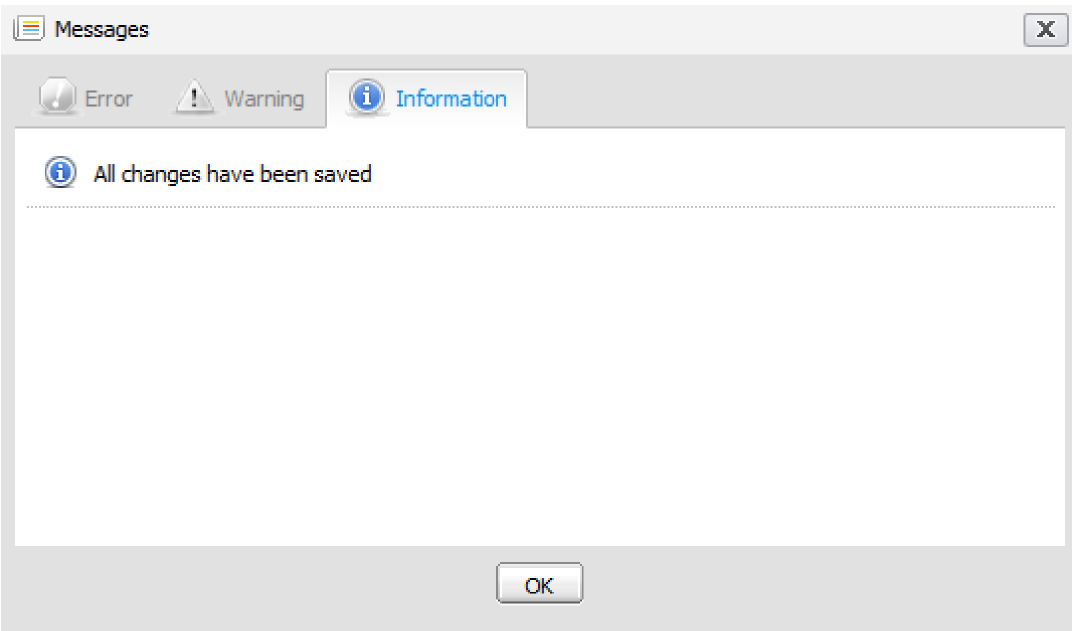
2. Select the **Info** tab.

3. Click the 

button.

4. Click the  icon to save the view.

   The following information message will appear:



Hide the JCR structure: select a document is showing the JCR structure, then click the 

button again.

4.7.4.24. 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.). Tags describe the item and enable keyword-based classification and searching.

Procedure 4.59. Add a new tag for a document

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

2. Click the 

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

Table 4.20.

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. Enter a value in the **Tag names** field. A document can be added several tags at a time by entering multiple tags in the **Tag names** field and separate by a comma (,).

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  icon to delete tags.

Procedure 4.60. Remove tags from a document

1. Select a document with tags that you want to remove.

2. Click the 

button on the action bar to open the **Tag Manager** form.

3. Click the  corresponding to the tags you want to delete.

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

4.7.4.25. Upload files into folders

This function allows you to upload a file from your machine. All file types can be uploaded. The uploaded file name cannot include the special characters: ! @ $ % & [ ].

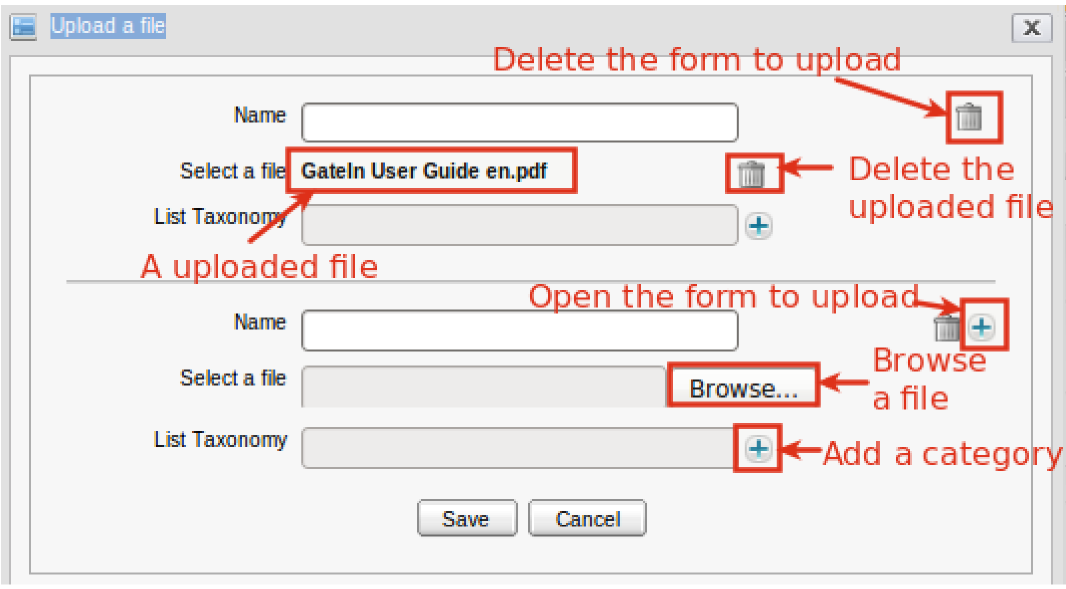
Procedure 4.61. Uploading a File into a Folder

1. Select the folder that you want to upload a file into (you can select from either the left or right panels).

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

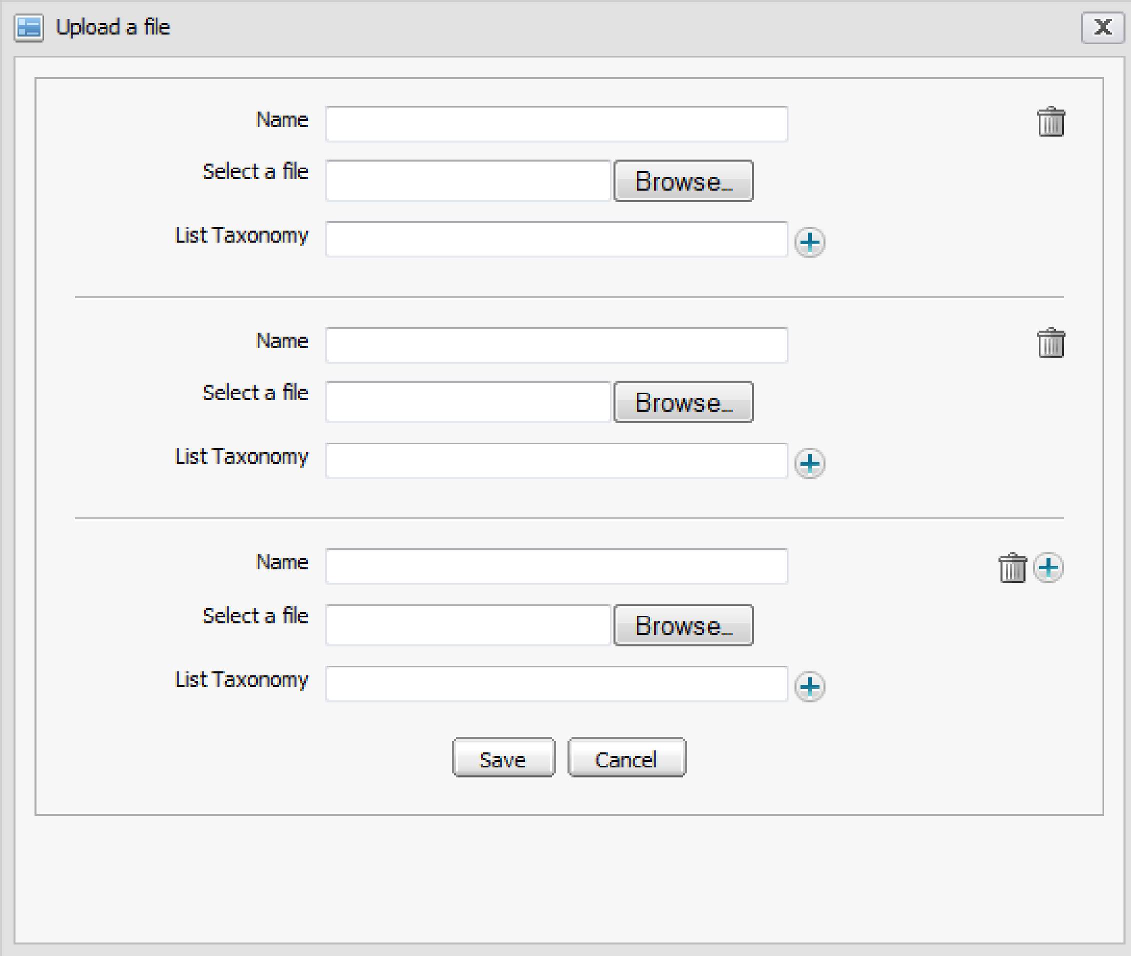
3. Click the 

button on the action bar to open the **Upload a file** form:



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

   If you want to upload multi files at the same time, click the icon to open more forms to upload more files:

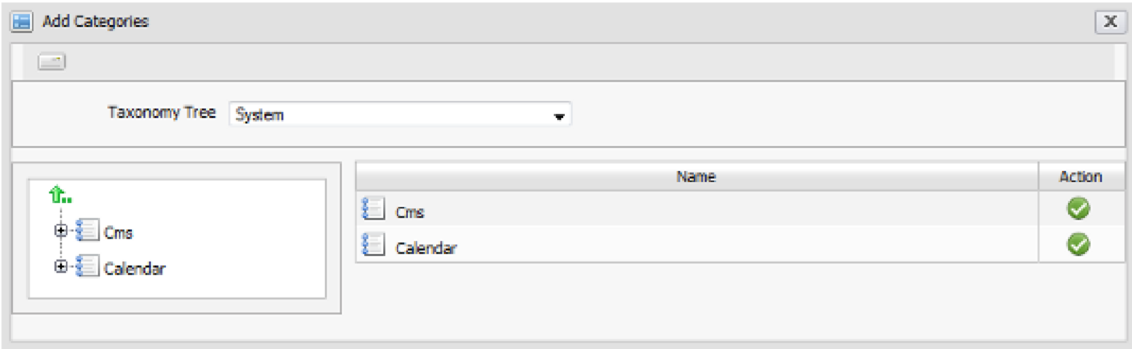


   The icon closes the upload file form.

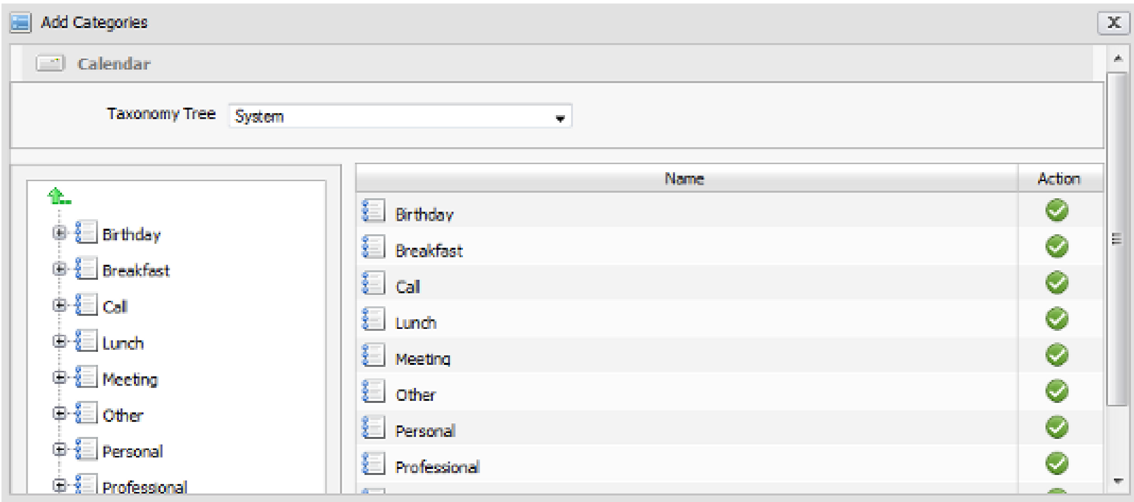
5. You can change the uploaded file by clicking the icon and clicking the **Browse...** button again to select another file.

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

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 the **plus** to open child nodes of categories.



Note

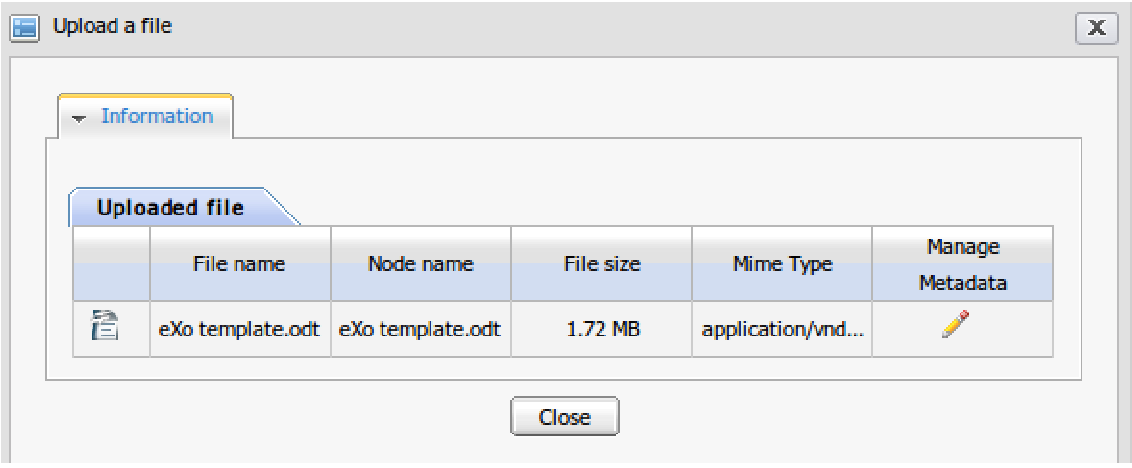
You can add more categories for a file by clicking the icon again to open the **Add Categories** form.

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

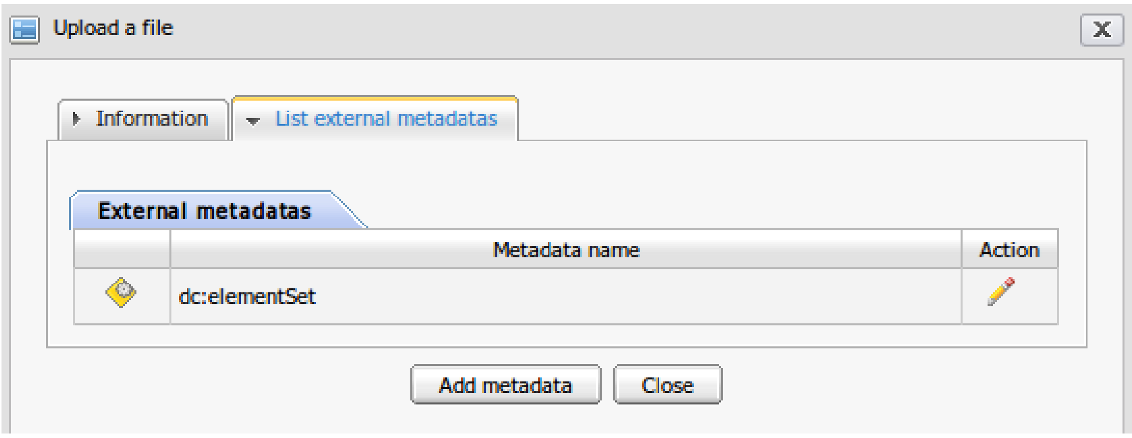
You can also manage categories which were added to files by using the **Manage Categories** function. See *Section 4.7.4.12, “Manage Categories”*.

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

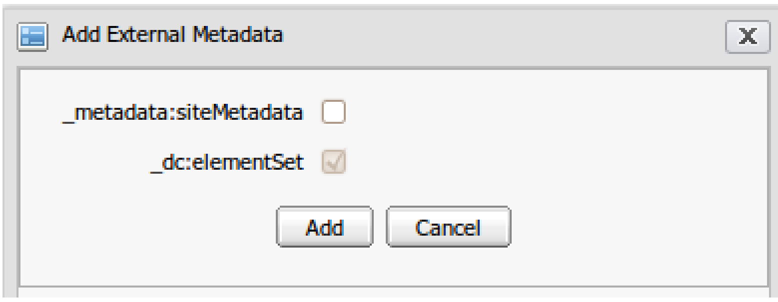
10. After being saved, the main information of the uploaded file will be displayed:



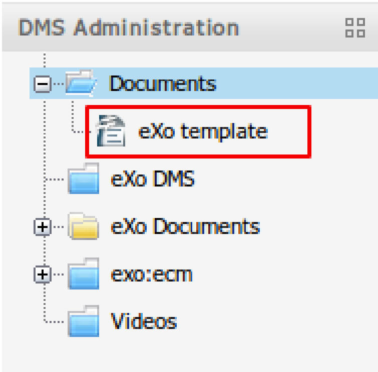
11. Click the icon to see more details of its external metadata information. The **List external metadata** tab will be enabled. Values can be entered into fields on this tab.



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



14. New metadata is displayed in the **External Metadatas** list and this can be edited it by clicking the icon.
15. Click **Close** to quit the **Uploaded information** form.
16. After being uploaded, the tree is displayed in the left panel:



> **File Size Limits**
>
> The size of the uploaded file depends on the size limit of the uploaded file that you set up in the Edit mode of Content Explorer. If your file size exceeds the limit, a pop-up message will appears to alert you.

4.7.4.26. View Metadata

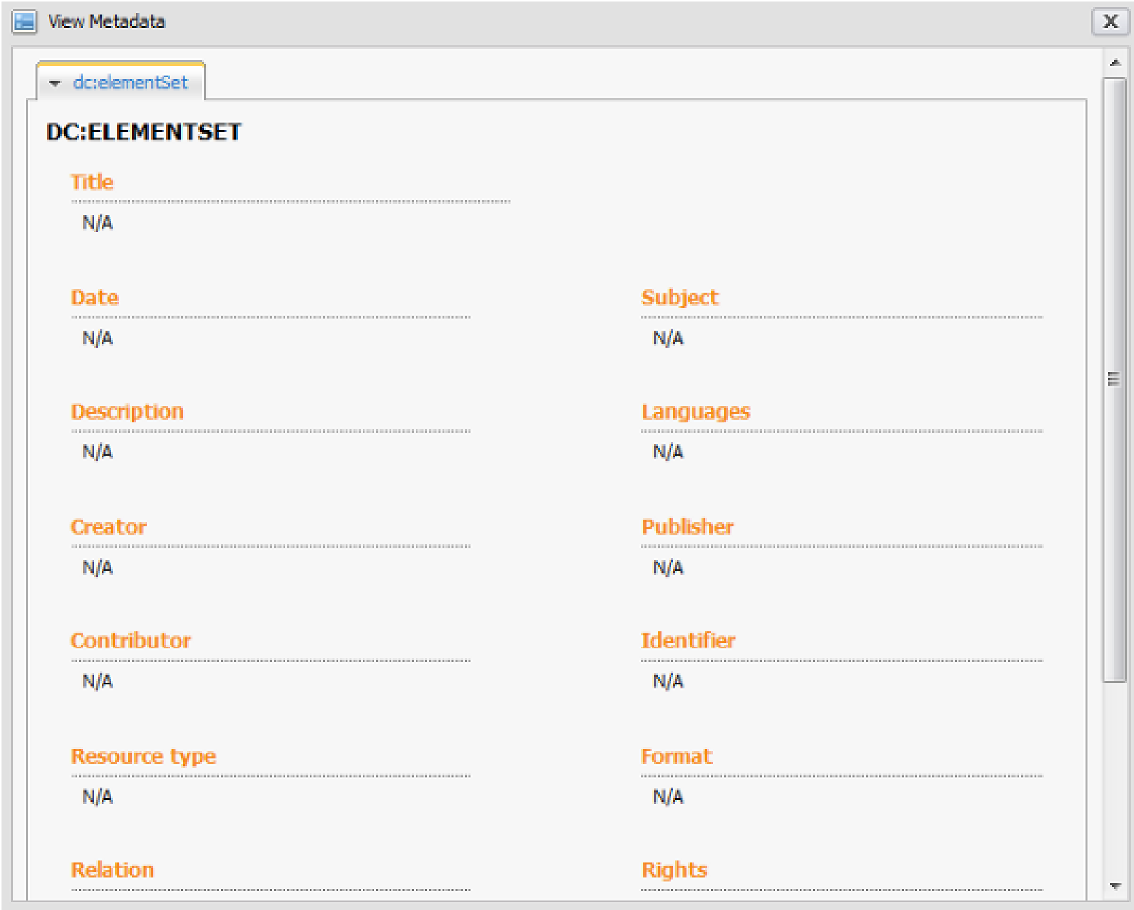
This function allows you to view the metadata attached to File nodes, Podcast nodes, File Plan child nodes and uploaded file nodes (**nt:file** nodes)

Procedure 4.62.

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

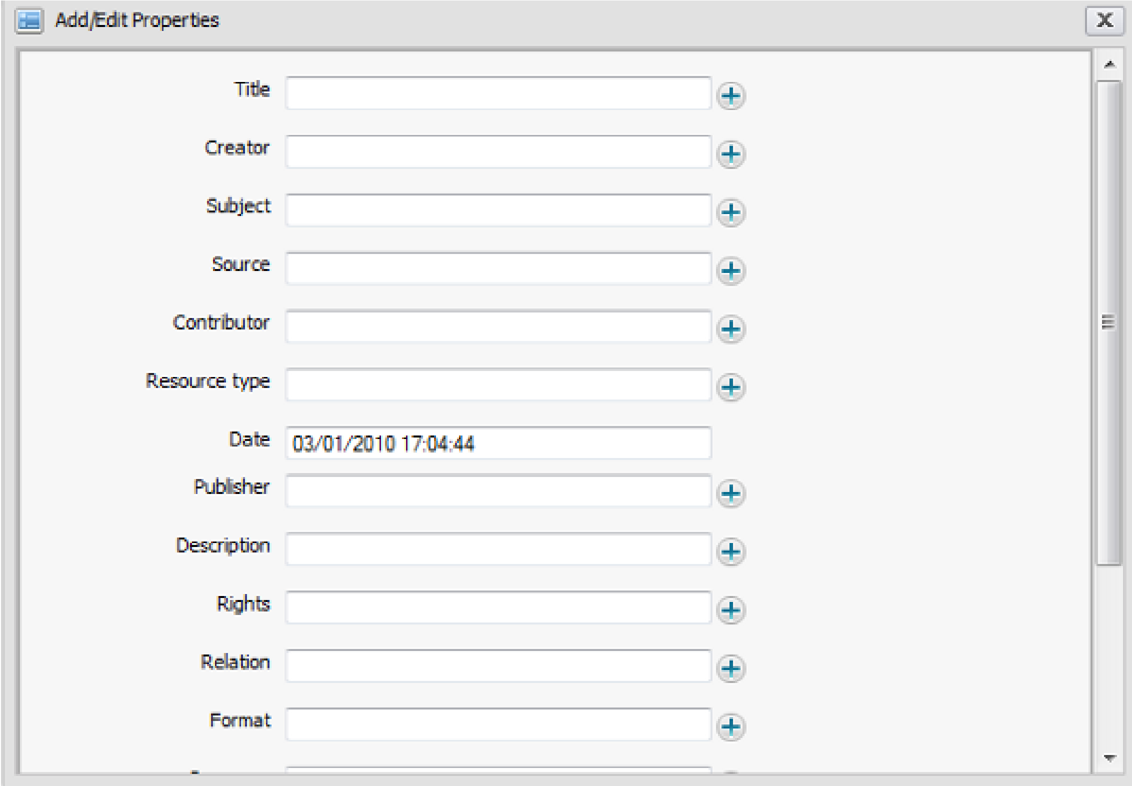
2. Click the 

button. The **View Metadata** form appears:



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 the  icon to add further metadata.



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

4.7.4.27. View Node Types

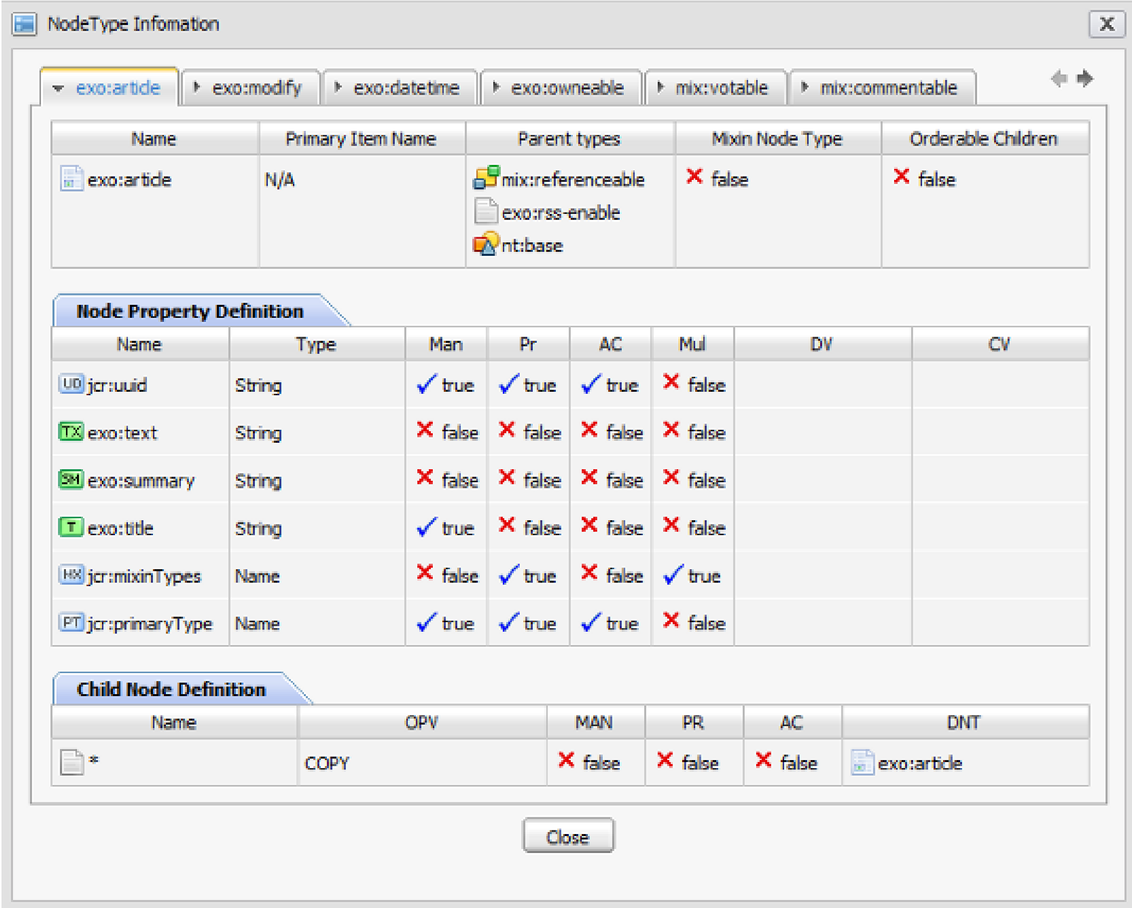
To view detailed information about a node:

Procedure 4.63.

1. Select a node that you want to view the detailed information for.

2. Click the 

button to view detailed information about the selected node.



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

4.7.4.28. View Permissions

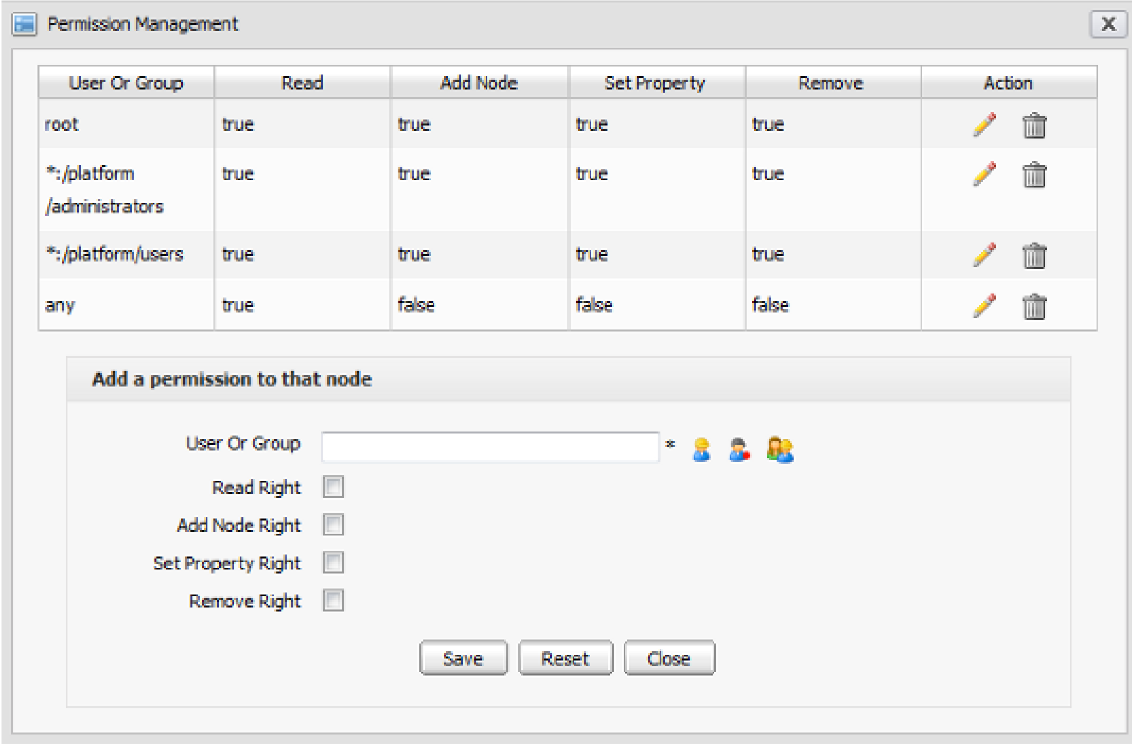
This function enables an administrator to manage the permissions for nodes.

Procedure 4.64. View Permissions

1. Select a node.

2. Click the 

button. The **Permissions Management** form appears.



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

Procedure 4.65. Add Permissions

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

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

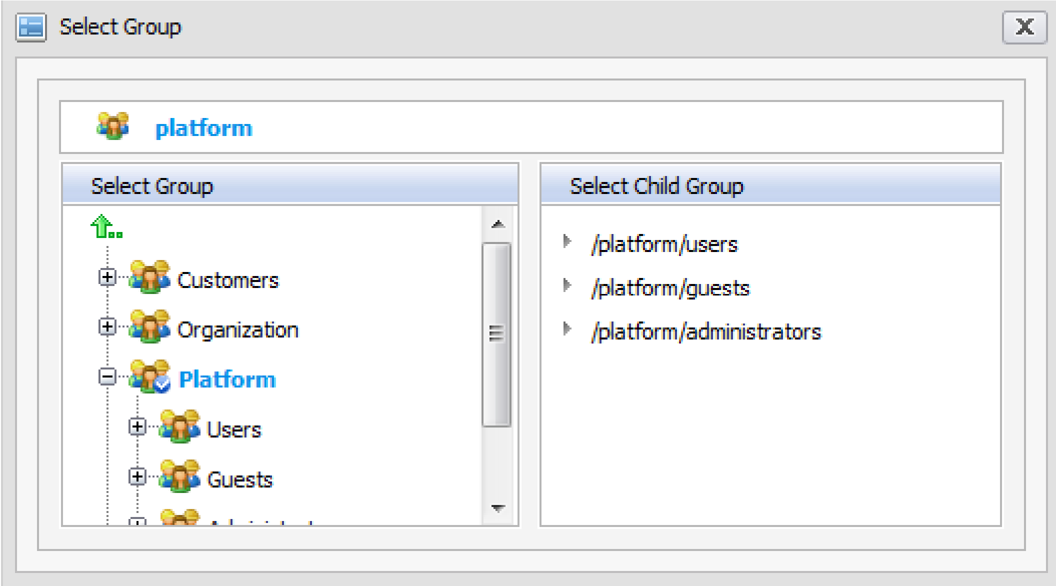
   Click the  beside the users you want to grant permissions to.

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 the  to search for users that match that information.

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

   Click the  button 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 checkboxes 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 4.66. 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.

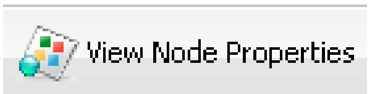
4. Click **Save** to commit the changed permissions.

Procedure 4.67. 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.

4.7.4.29. View Properties

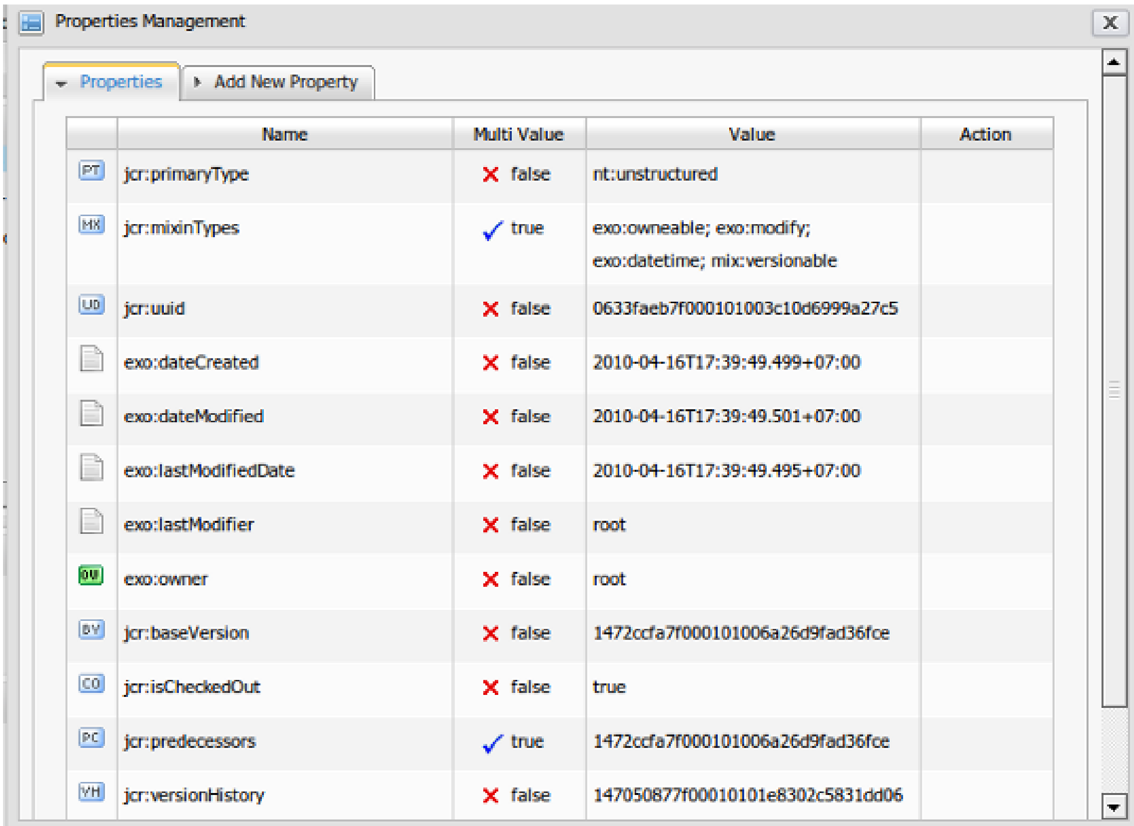
This function allows users to review all the properties and values of a node. It can also be used to add values to a node.

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.

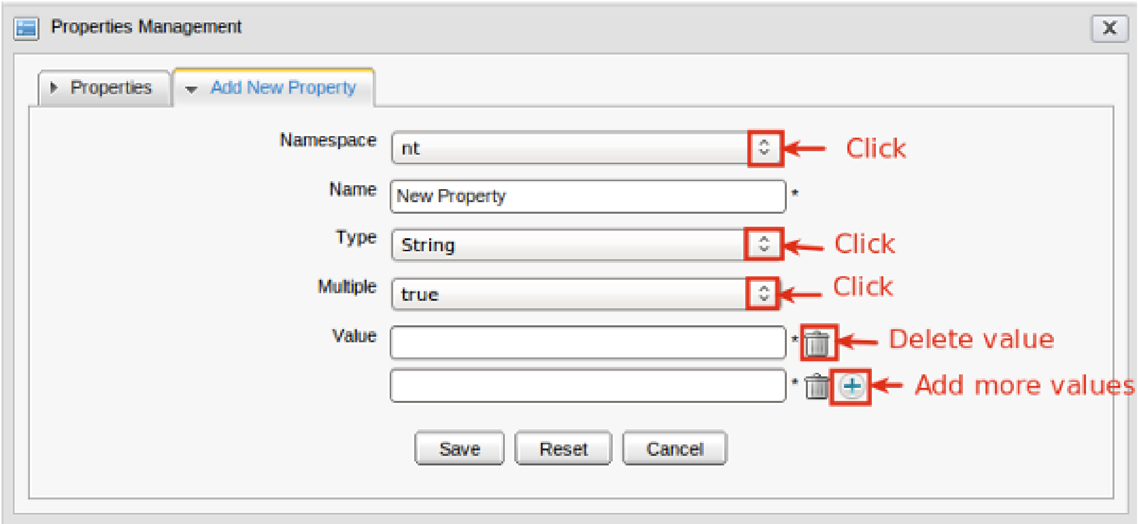


	Name	Multi Value	Value	Action
PT	jcr:primaryType	false	nt:unstructured	
MX	jcr:mixinTypes	true	exo:owneable; exo:modify; exo:datetime; mix:versionable	
UD	jcr:uuid	false	0633faeb7f000101003c10d6999a27c5	
	exo:dateCreated	false	2010-04-16T17:39:49.499+07:00	
	exo:dateModified	false	2010-04-16T17:39:49.501+07:00	
	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.



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.

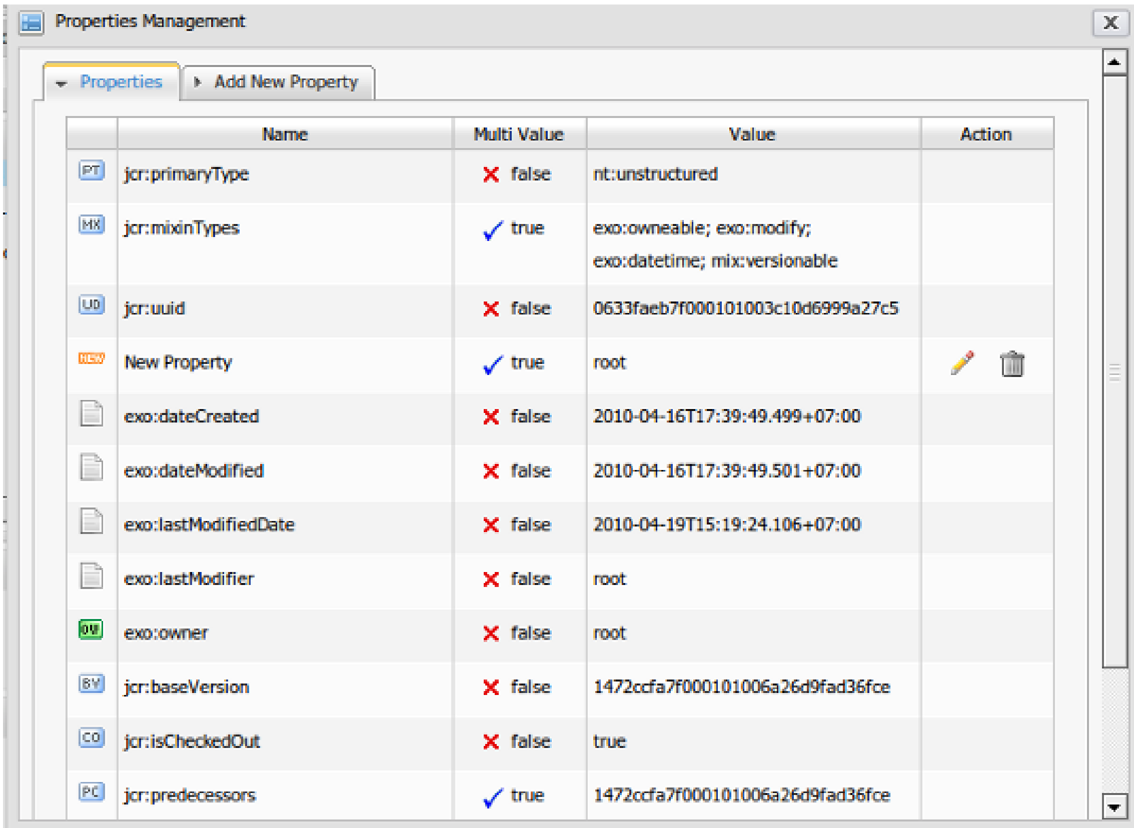
6. Enter a value for the property in the**Value**.

7. To add multiple new values, click the  icon and repeat the above steps.

   To remove a value, click the  .

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.



In this form you can edit a property by clicking the icon or delete it by clicking the .

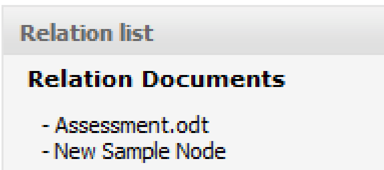
4.7.4.30. View Relations

This function shows documents related to a selected node.

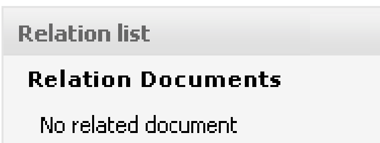
1. **To View Relations**

   Select a node then click the 

 button. 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 the 

button again to hide relations.

4.7.4.31. Vote

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

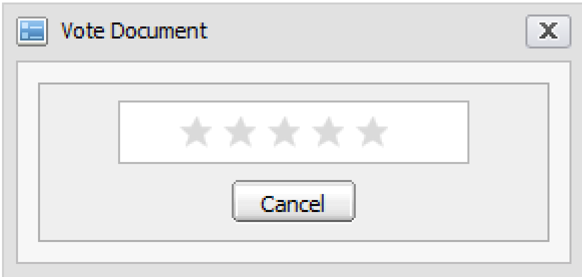
Procedure 4.68.

1. Open the document you want to vote for.

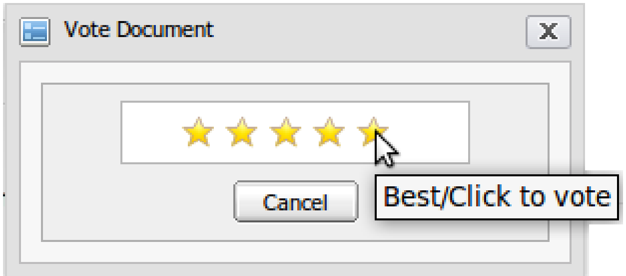
2. Click the 

button on the action bar.

   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:

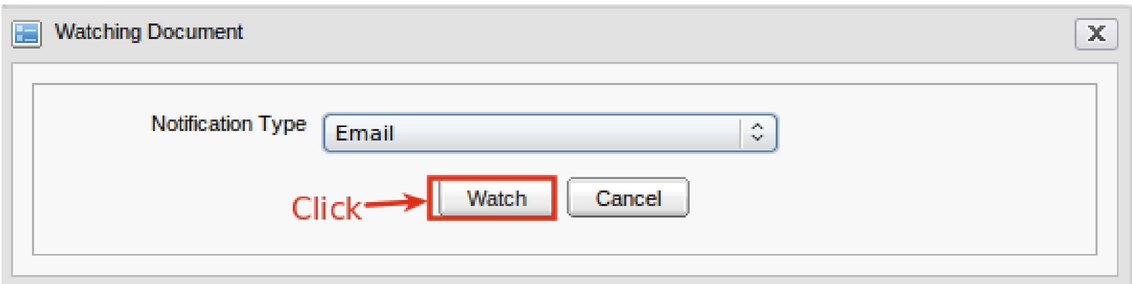
4.7.4.32. Watch Documents

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

Procedure 4.69.

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 the  icon.

A message will appear for you to confirm the action.

4.7.5. Manage Content In Content Explorer

A web content is a key resource in creating 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 the **Sites Management** drive can manage web content.

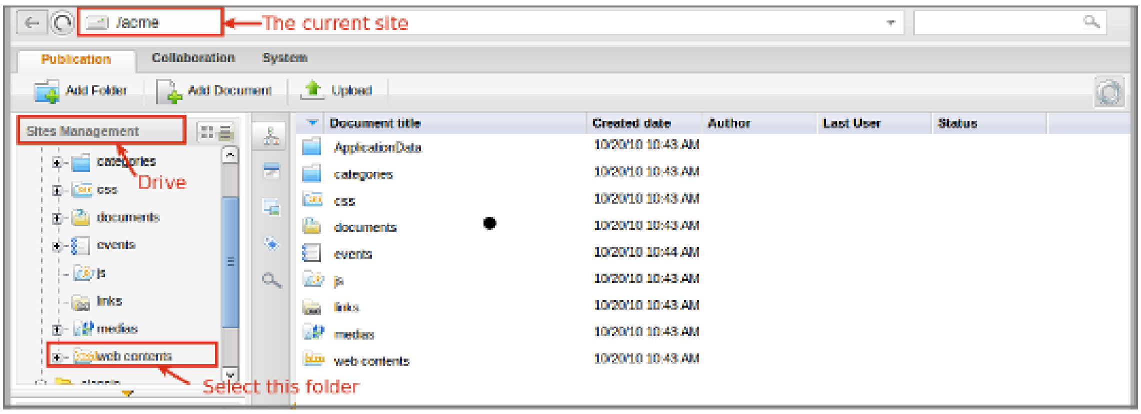
4.7.5.1. Create a new web content

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

Procedure 4.70. Add new content

1. Go to the **Sites Management** drive and select a site that you want to add a web content to.

2. Select the web content folder on the left:

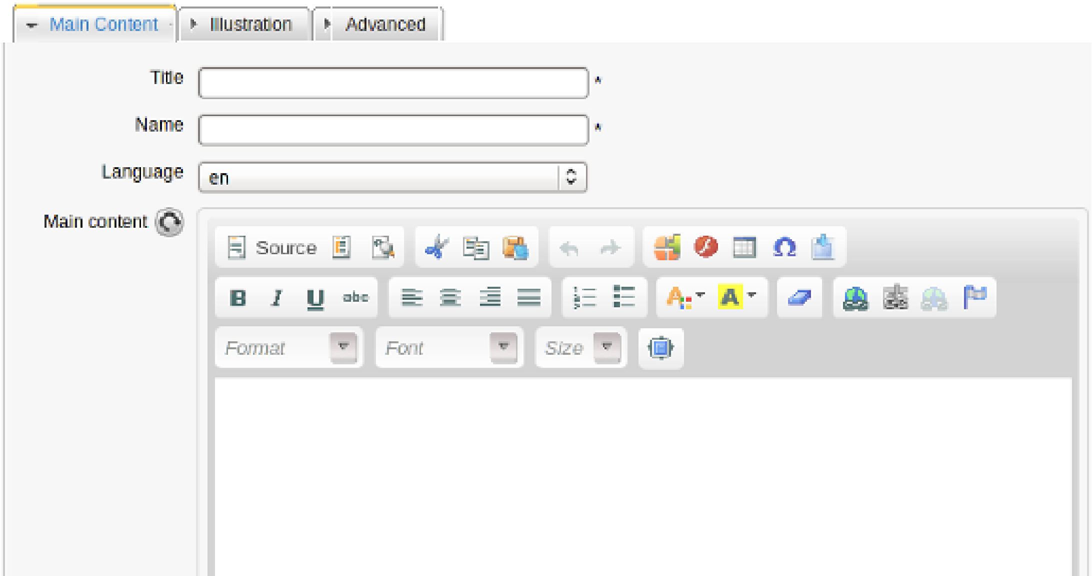


> **Note**
>
> You also can add the new web content into other folders (documents and media folder) of a site but it is recommended that you add new content to the web content folder because:
>
> - It will allow you to manage web content of a site more easily.
> - If you add a new web content in this folder, you don't need to select a web content document in the list of document types. This makes adding a new web content more flexible.

3. Open the **Add New Document** form by clicking the 

icon on the Action bar.

4. Select a template in the **Select Template** field to present web content:



The **Select Template** field has two options:

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

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

6. Click **Save as Draft** to save the content or **Cancel** to exit the form.

7. **Tabs in the Add New Document form**

   The **Main Content** Tab includes:

Table 4.21.

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

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

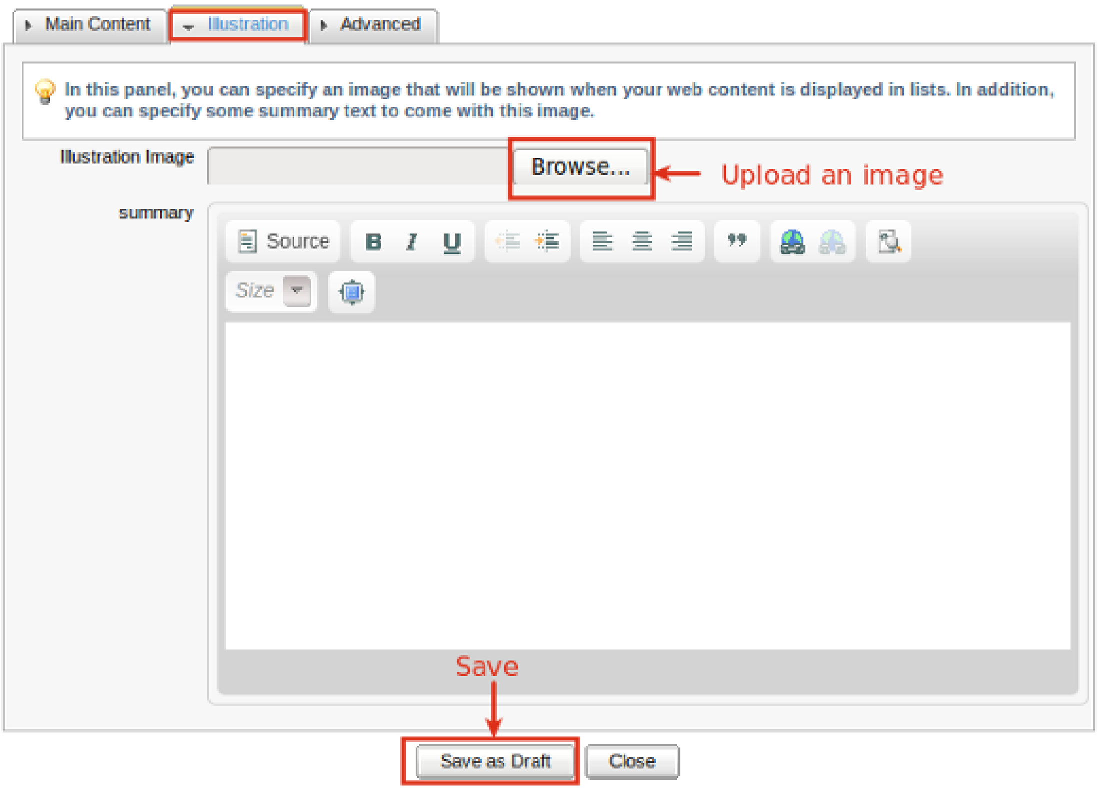


Table 4.22.

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 supply a short description about the web content that will be displayed with the illustration image when the web content is listed. The main content will be shown when it is selected to be viewed.

Do the following to upload an image:

Procedure 4.71. Upload an image

1. Browse an image list on your local device 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**:

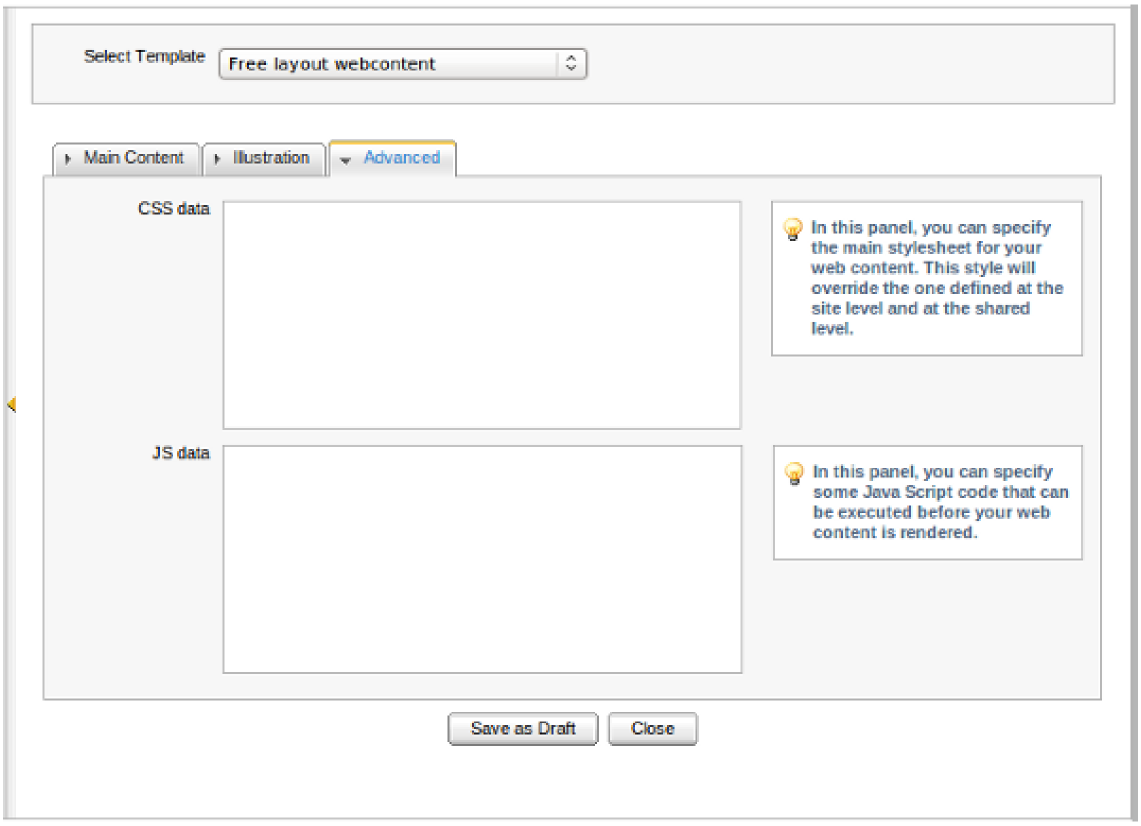


Table 4.23.

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

4.7.5.2. 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 4.72. Edit a web content

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

2. Select the web content by double-clicking it on the left tree or on the right panel. The detailed information of web content will be viewed on the right panel.

3. Click the 

icon on 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 editing. After finishing, the content reverts to unlocked status. You can manage Locks in the Administration portlet.

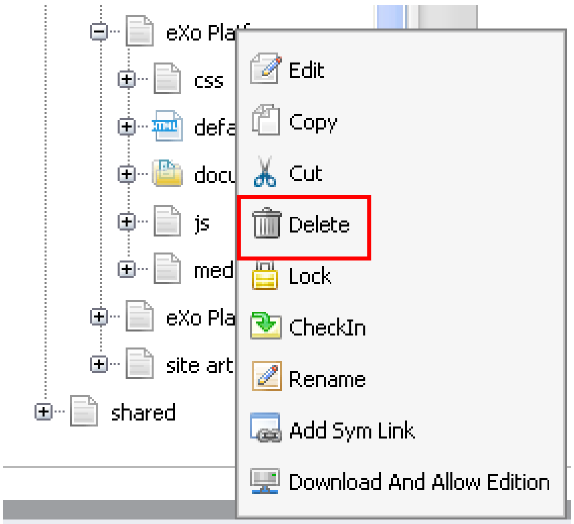
4.7.5.3. Delete a web content

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 4.73. Delete a web content

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



2. A confirmation message will appear. Click **OK** to accept the deletion, or **Cancel** to quit without deleting.

4.7.5.4. 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 4.4.3, “Publication Process”* to know how to publish a web content.

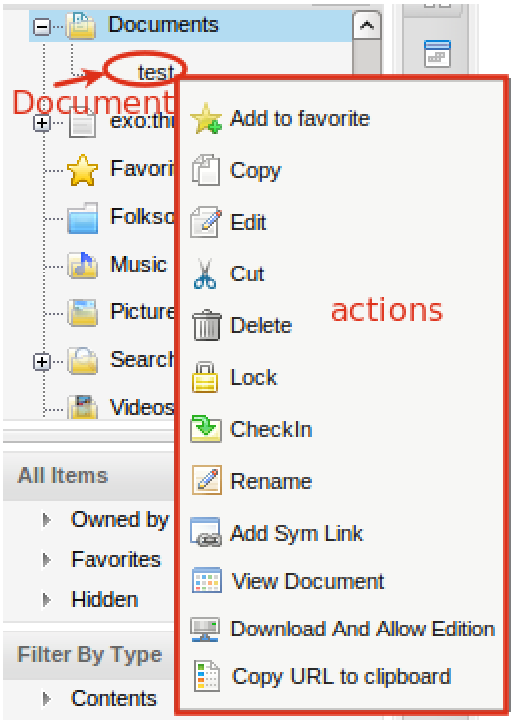
After the content is published, all users who have the right to access that position can view the published web content as a page on the Navigation bar.

4.7.6. Actions on Folders and Documents

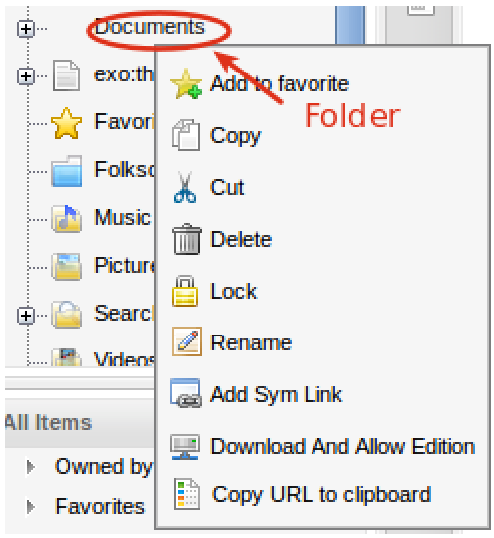
This section will discuss actions that can be performed on folders and document, both from the right-click menu (*Cut* and *Paste* for example) and manual actions (like dragging and dropping).

The actions available in the right-click menu are different for folders and documents.

The actions available for documents are:



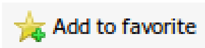
The actions available for folders are:



4.7.6.1. Add to favorites

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

Procedure 4.74.

1. Right-click a node you want to add as a favorite
2. Click the 

entry in the drop-down menu.

A symlink of your favorite nodes will be created in the **Favorite** folder.

4.7.6.2. Copy/Paste

This function is used to make a copy of a node (including subnodes) in other places.

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

Procedure 4.75. Method One

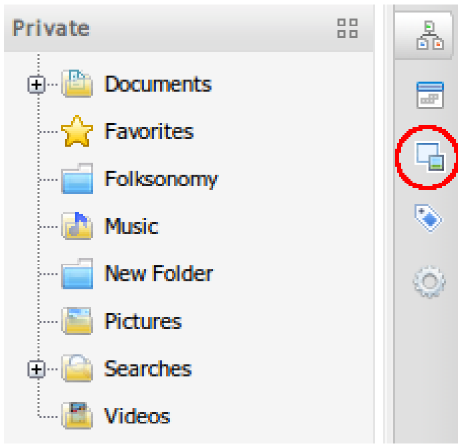
1. Right-click the node then select **Copy** from the drop-down menu.
2. Select a destination node that you want to be the parent node of the cut/copied node.
3. Right-click the destination node and select **Paste** from the drop-down menu.

   > **Pasting Content**
   >
   > The **Paste** function is only enabled after some form of data (a document, for example) has been added to the Clipboard through the **Copy** or **Cut** action.

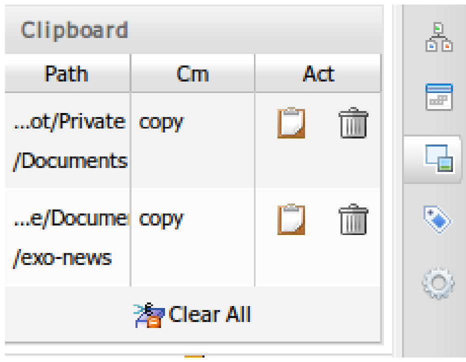
4. The copied folder (and any sub-folders) will be pasted to the new selected path.

Procedure 4.76. 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  icon in the clipboard window to paste the copied node into the selected destination node in **Step 3**.

6. You can click the  icon 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 Considerations

- You only can use the **Copy** action if you have the appropriate permissions on the source node.
- You only can use the **Paste** action if you have a right on the destination node.
- If the destination node contains a file with the same name as the copied file, the pasted file will have an index integer added to its name.

  For example; *New Folder* contains a node named `Live` which is copied and pasted into a location that already contains a node named `Live`. After the paste action the new file will be named `Live[2]`. The original `Live` file will be unchanged.

- You cannot copy a content folder into a document folder.
- *Pasting* a node does not remove it from the Clipboard. Therefore, after using the **Copy** action you can use **Paste** to copy the node into multiple nodes without needing to use the **Copy** action again.

4.7.6.3. Edit documents

To edit a document, refer to *Section 4.7.5.2, “Edit a web content”*.

4.7.6.4. Cut/Paste

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

Procedure 4.77. Method One

1. Right-click a node and 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 and select **Paste** in the drop-down menu.

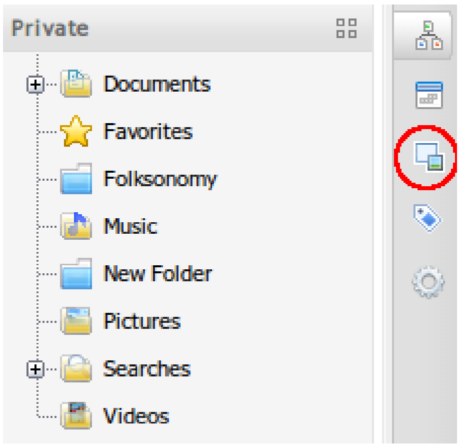
   Pasting Content

   The **Paste** function is only enabled after some form of data (a document, for example) has been added to the Clipboard through the **Copy** or **Cut** action.

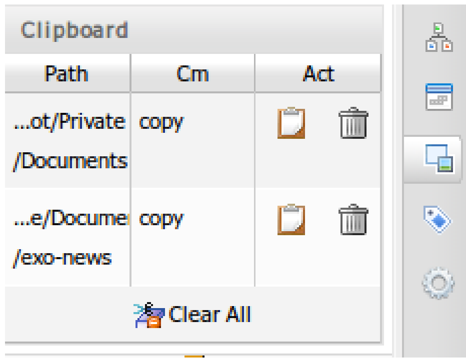
4. The cut node (and its subnodes) will be pasted to the new selected path.

Procedure 4.78. Method Two

1. Right-click a node and 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  icon in the clipboard window to paste the copied node into the selected destination node in **Step 3**.

6. You can click the  icon 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/Paste Considerations

- You only can use the **Cut** action if you have the appropriate permissions on the source node.
- You only can use the **Paste** action if you have a right on the destination node.
- If the destination node contains a file with the same name as the copied file, the pasted file will have an index integer added to its name.

For example; *New Folder* contains a node named `Live` which is cut and pasted into a location that already contains a node named `Live`. After the paste action the new file will be named `Live[2]`. The original `Live` file will be unchanged.

- You cannot Cut a content folder into a document folder.
- *Pasting* a node does not remove it from the Clipboard. Therefore, after using the **Cut** action you can use **Paste** to copy the node into multiple nodes without needing to use the **Cut** action again.

4.7.6.5. Delete folders and documents

This function helps you remove folders/documents from theirs location easily. Follow the steps in *Section 4.7.5.3, “Delete a web content”*

Delete Rights

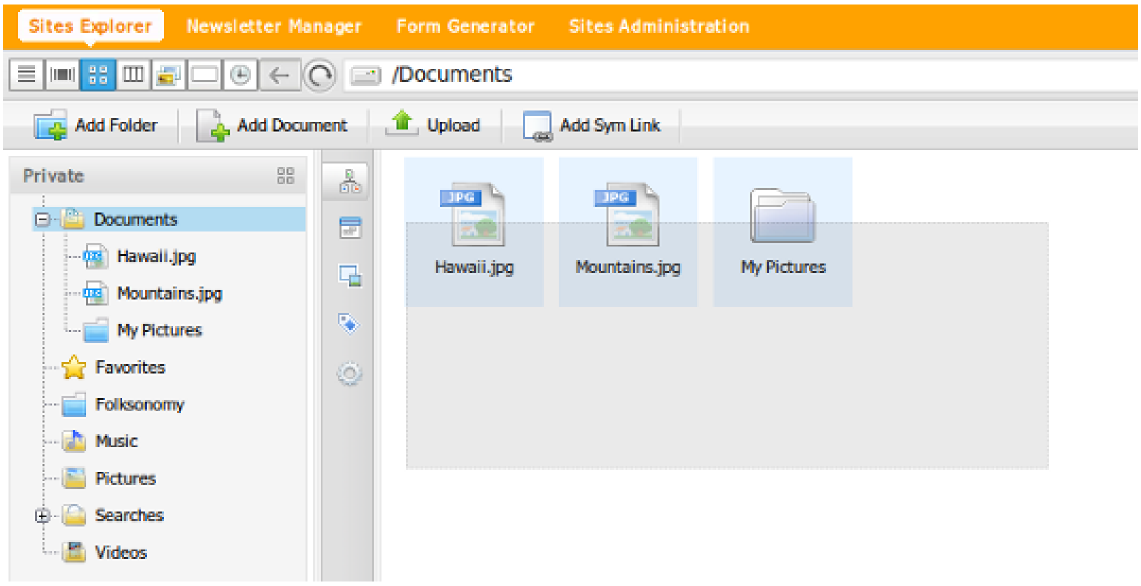
- You can only use the **Delete** action if you have the appropriate permissions on the node.
- If the deleted node contains subnodes, these will also be deleted.

4.7.6.6. Drag and drop folders and documents

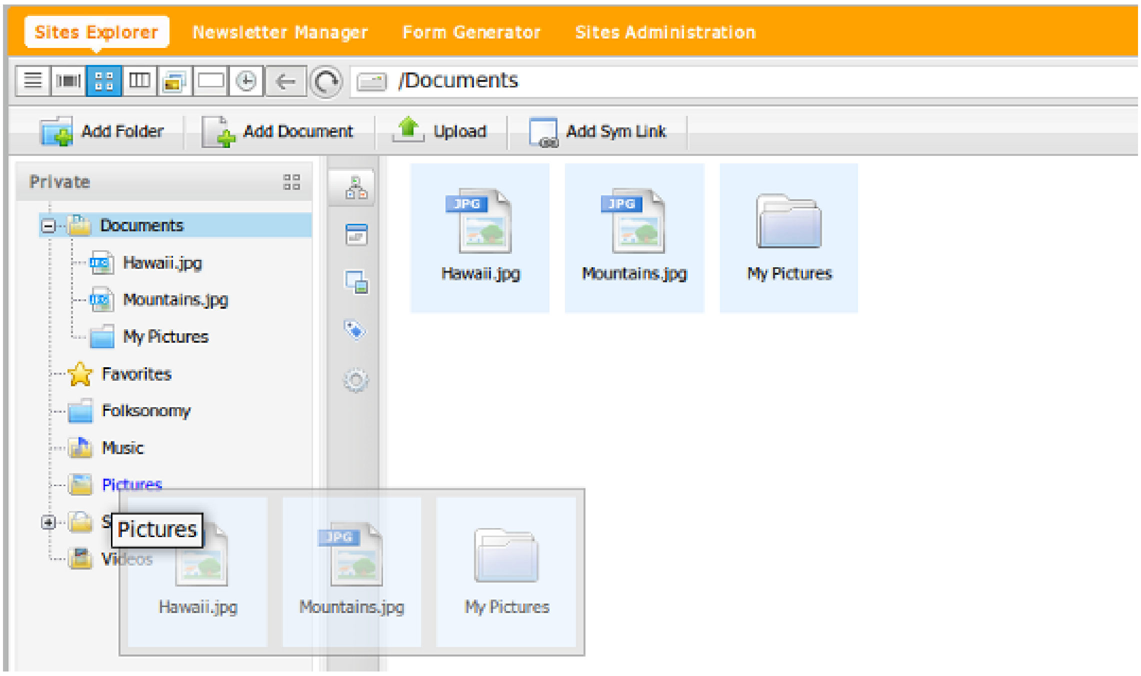
This function allows you to move folders or documents from their current location to another by using the drag and drop feature.

Procedure 4.79.

1. Move the cursor to the folder(s) or document(s) in the right panel until the cursor changes to . You can hold the **Shift** key to select multiple contiguous folders/documents at once or the **Ctrl** key to select multiple non-contiguous files.



2. Hold 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.

4.7.6.7. Lock/Unlock folders and Documents

This function prevents other users from changing specific folders/documents for a specific period.

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

Locking Rights

- Only users with appropriate rights can lock folders or documents.
- After a node is locked, other users can view the locked node, but cannot alter or remove it. They can, however, create and edit a *copy* of the locked node (using the Copy/Paste functions outlined above).
- A lock will be kept on a node for the current session only. The lock will be automatically removed when the user who locked the node signs out.
- A lock will also be automatically removed if no action is taken on the locked node for thirty (30) minutes.

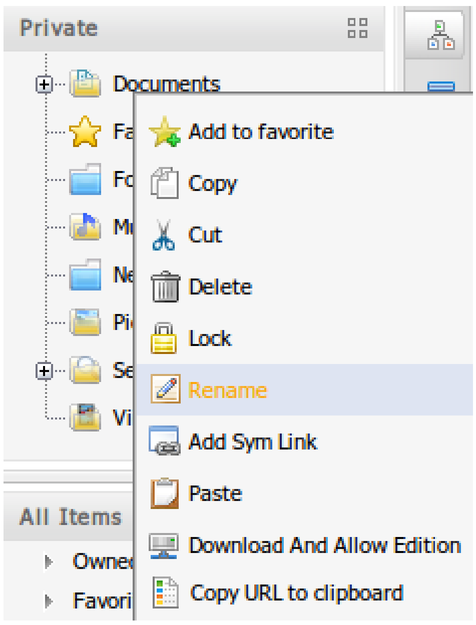
Unlock folders/documents. To unlock a node you have locked, right-click it and select **Unlock** from the menu. The folder/document will then be unlocked and other users can take actions on it.

4.7.6.8. Rename folders and Documents

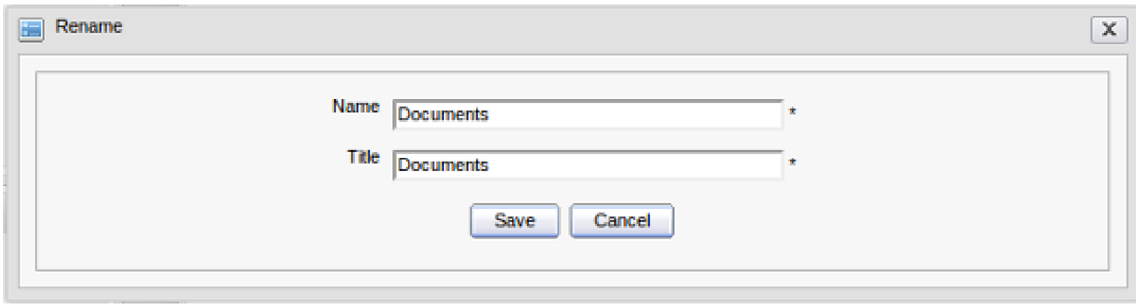
This function is used to change the name of a folder/documents.

Procedure 4.80.

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



   The rename form will appear:



2. Enter 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.

4.7.6.9. Add a symlink

Creating a symbolic link (*symlink*) to a node is an effective way to quickly access that node from other nodes without having to navigate through the content structure manually.

Procedure 4.81.

1. Right-click a document that you want to add a symlink to (in this instance the term *to* is used to describe the node as the target of the symlink, not an addition to the original node itself) and select **Add SymLink** from the menu.

2. A symlink to the selected document will be created immediately. You can click the symlink to view its content.

4.7.6.10. View WebDAV

WebDAV allows users to access (read and write) files and folders over the web. WebDAV is used to view nodes because it offers easy, quick, flexible and efficient data manipulation.

Procedure 4.82.

1. Select the path of node you want to view via 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. The view in WebDAV form will be different for different node types:

Table 4.24.

Node Type	WebDAV Details
Folder	The subnodes list of the current folder will be displayed in WebDAV.

Node Type	WebDAV Details
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 have a form attached that users have to complete to download this document.
Sample node	This node lists folder names as *exo:images*. Like Article nodes, 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.

4.7.6.11. View Document

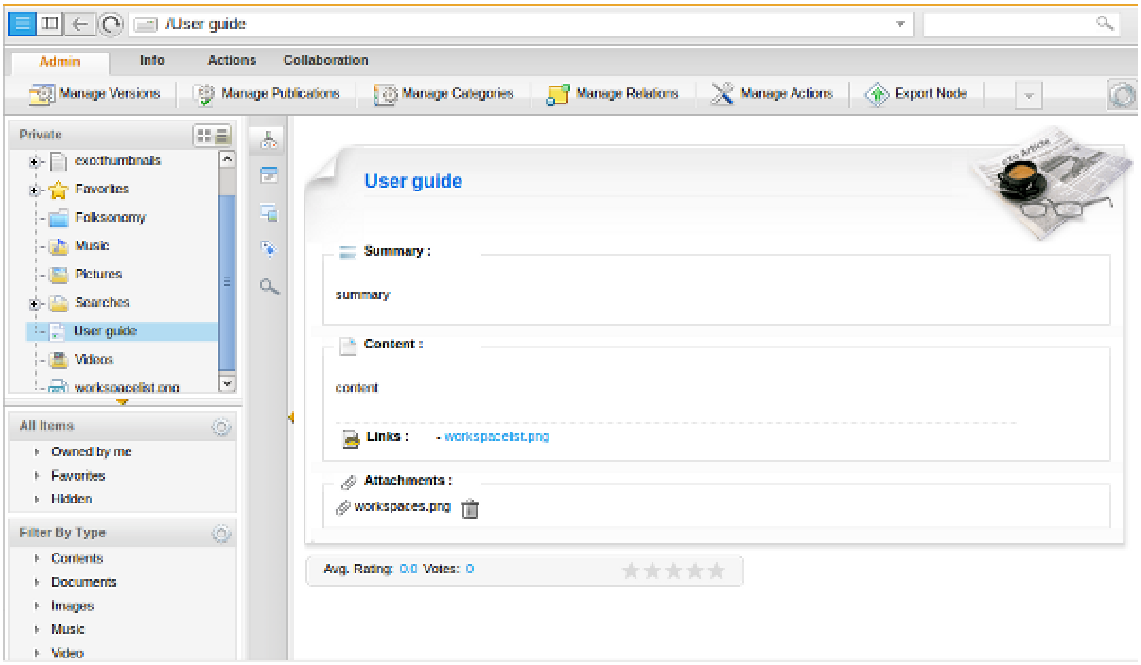
This function opens a document on another tab with a link containing the document path.

Do the following to view a document.

Procedure 4.83. View a document

- Right-click the document that you want to view and select **View Document** in the drop menu.

  The document is opened in another browser:



The URL of the document is structured like so:

http://example.com:8080/ecmdemo/private/acme/siteExplorer/repository/path/to/document

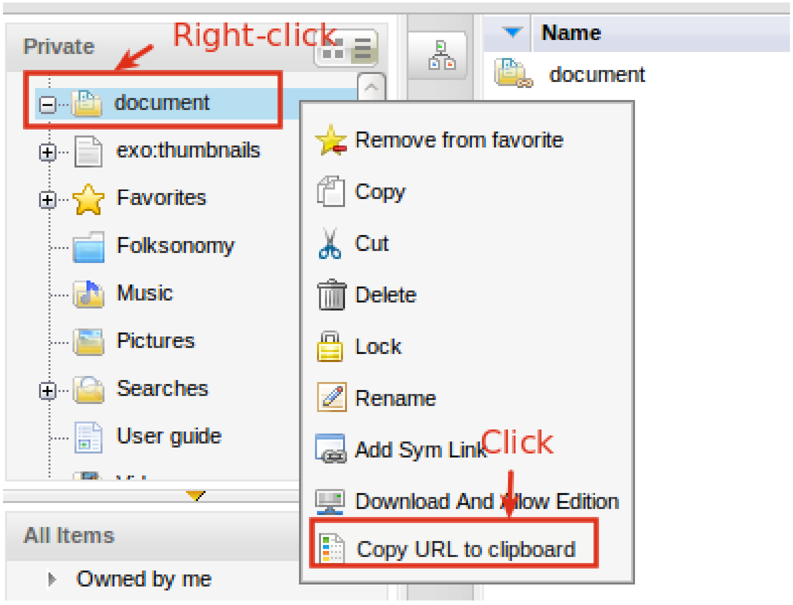
4.7.6.12. Copy URL to Clipboard

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.

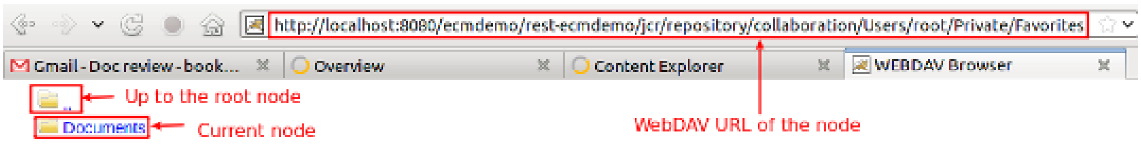
Do the following:

Procedure 4.84. Copy URL to Clipboard

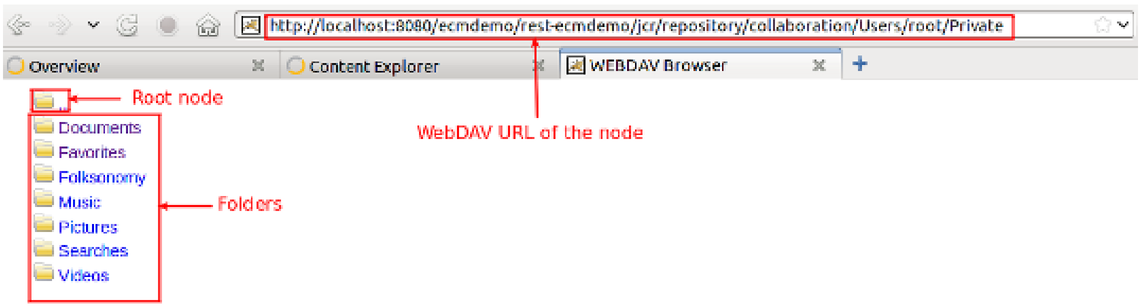
1. Right-click a folder/document and select **Copy URL to Clipboard**.



2. Paste the URL into another browser window (or another tab in the same browser window).



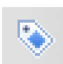
You can view the folders of the node or download documents to your device. You also view other nodes by clicking the folder named **..** to go up to the parent node. See the below illustration:

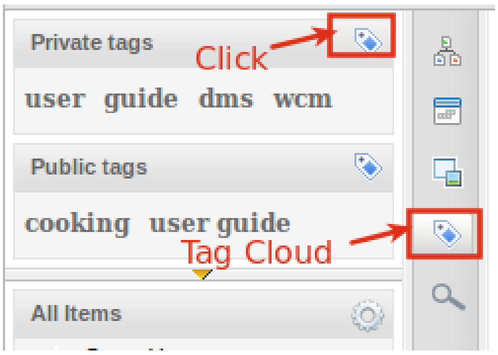


4.7.6.13. Manage Tags

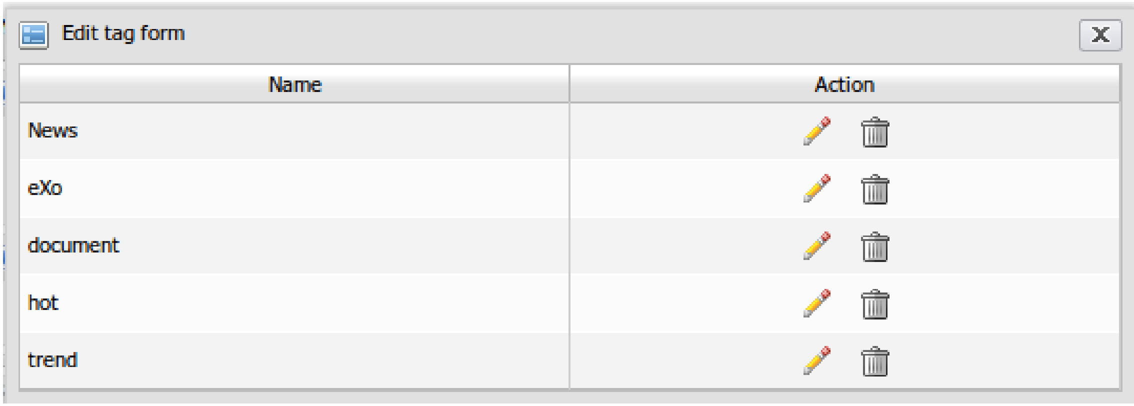
Tags are easily managed by editing or deleting them with the **Tag Manager**.

Procedure 4.85. Edit a tag

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

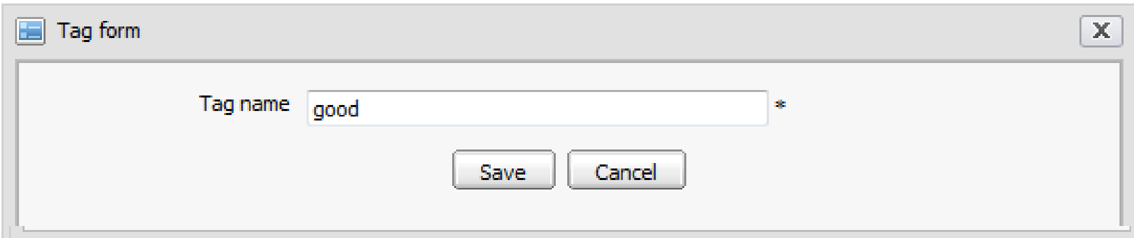


The **Edit tag form** will appear:



2. Click the icon that corresponds to the tag you want to edit.

3. Edit the tag as desired.



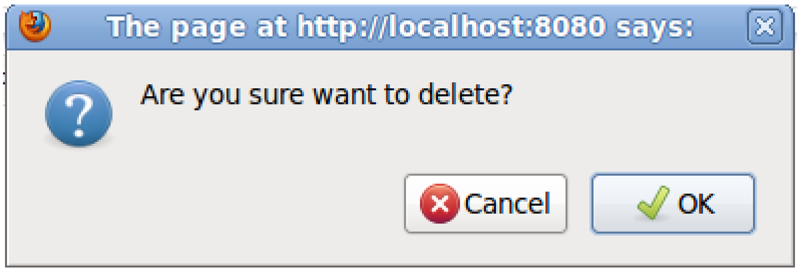
4. Click **Save** button to commit the change or **Cancel** to quit without changes.

Procedure 4.86. Delete a tag

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

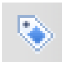
2. Click the icon.

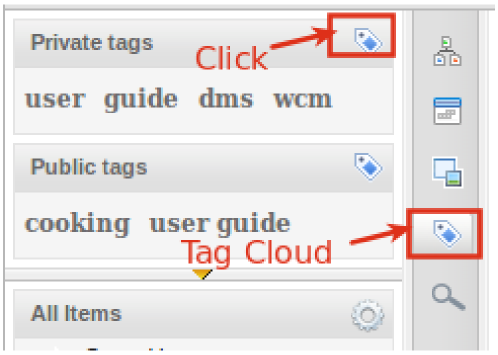
   A confirmation box will appear:



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

Procedure 4.87. Use Created tags

1. Click the  icon. You will see all existing tags. All existing tags are listed and classified by private or public tags.

   Tags will be displayed differently depending on popularity. The font-size, font-weight, color, font-family, text-decoration will change to visually represent popularity.

   For example, when a tag is added to more than ten documents it will be displayed in red with in a 20px size, bold font. These details 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 to see a list of documents with that tag displayed in the right panel.

4.8. Manage Content with WebDAV

4.8.1. What is WebDAV?

WebDAV is an abbreviation of **Web**-based **D**istributed **A**uthoring and **V**ersioning. It is used to publish and manage files and directories on a remote server. It also enables users to perform 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 the *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.

4.8.2. Why use WebDAV?

With WebDAV, you can manage content efficiently. You can:

- Copy/paste content on your device and have those changes reflected in a host-based website.
- Easily and quickly manipulate actions on a website without having to access it directly. Files can be accessed from anywhere and are treated as if they were in local directories.
- Easily and quickly upload content to a website simply by copying it into the appropriate directory.

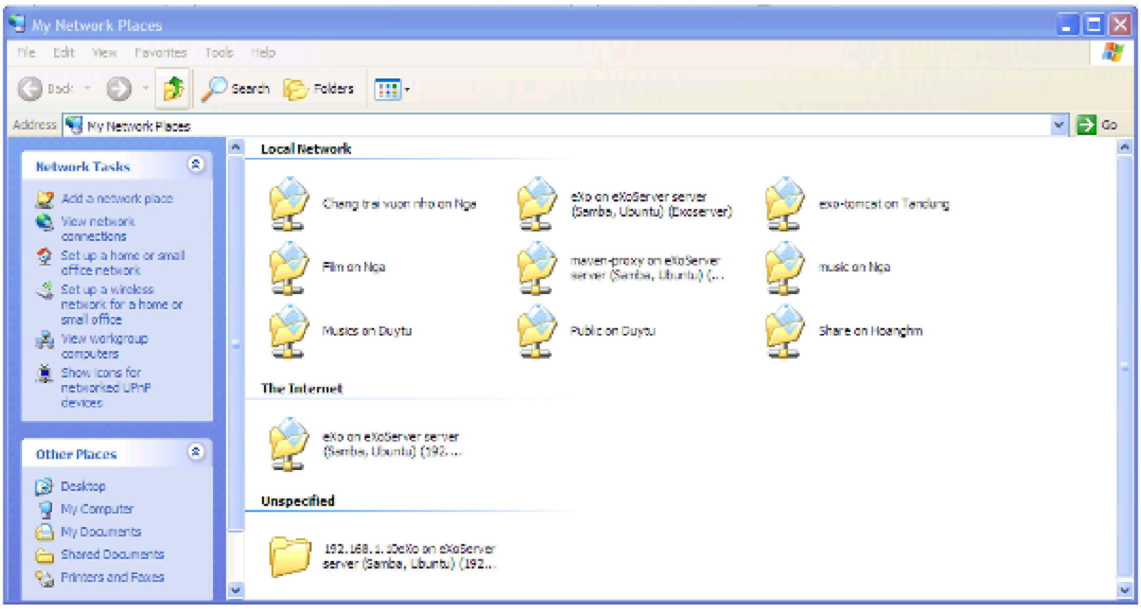
4.8.3. How to Use WebDAV With eXo Content

To use WebDAV with eXo Content, you first need to have an active network connection. Next, you can follow one of the two following ways:

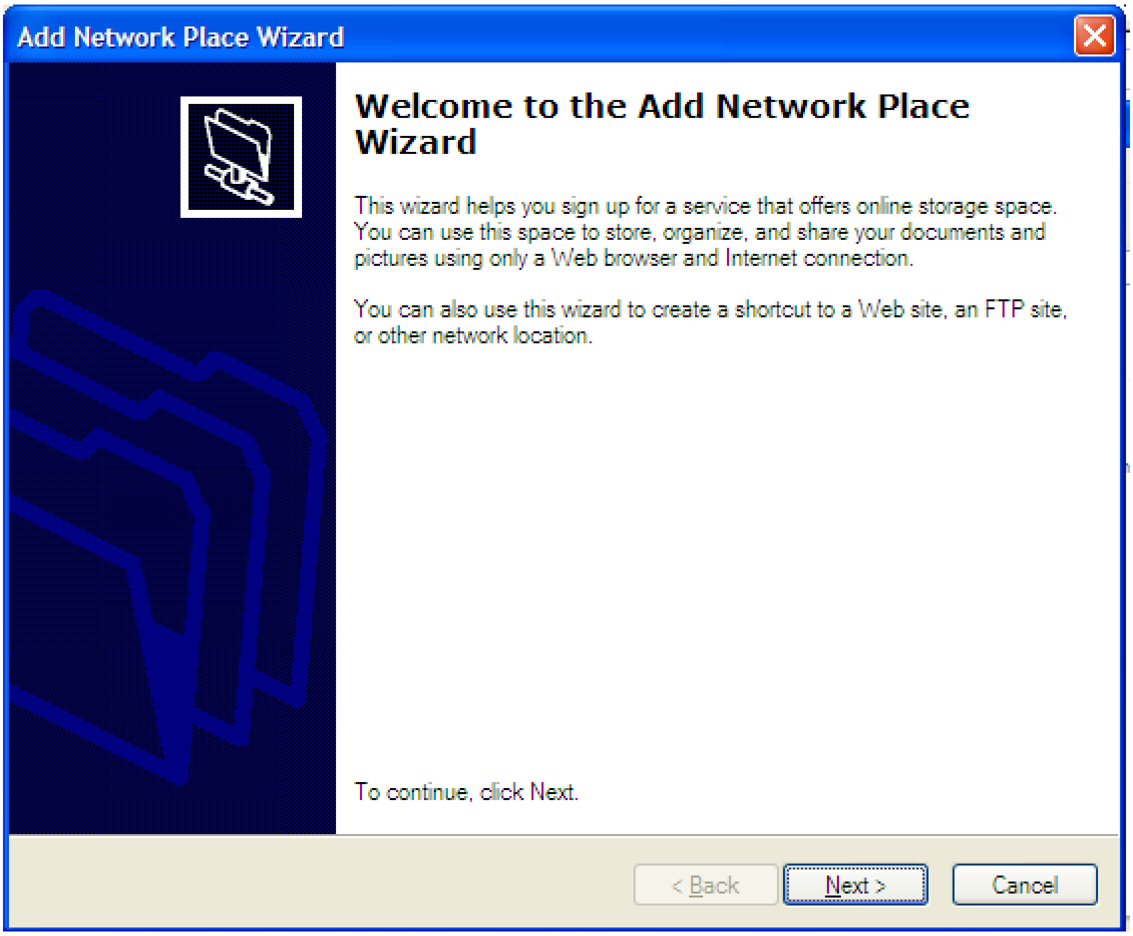
Procedure 4.88. Method One: WebDAV server

This procedure uses Windows XP as an example. Please modify the following steps to suit your operating environment:

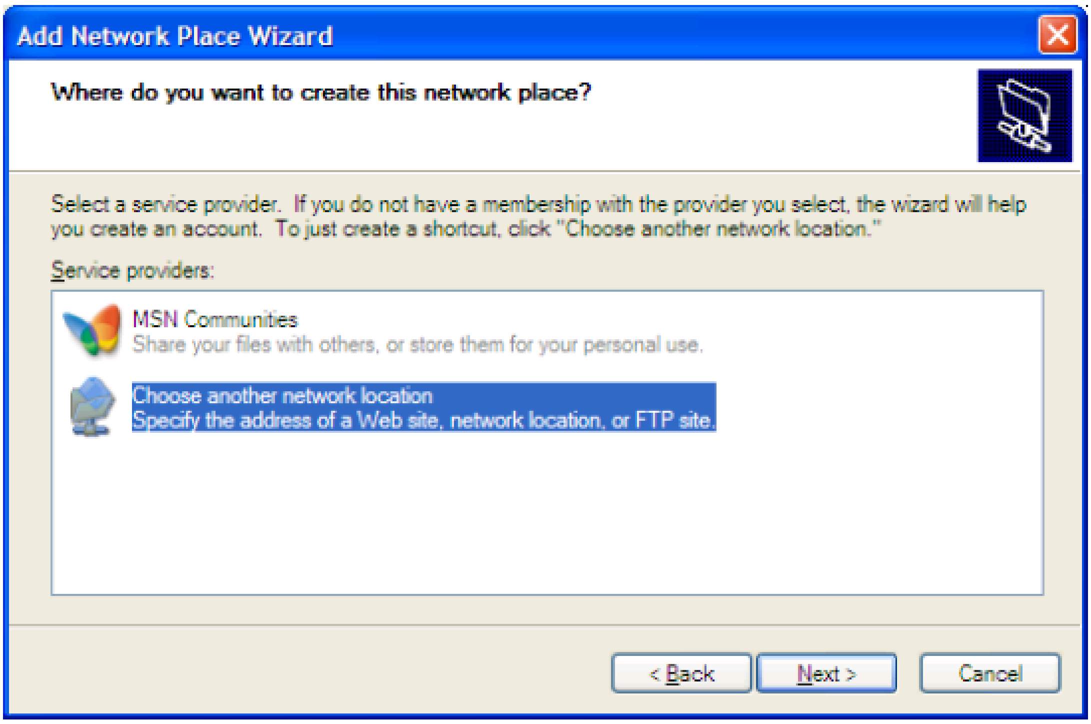
1. Navigate to **My Network Places** on your local computer. You will see all shared files and folders:



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



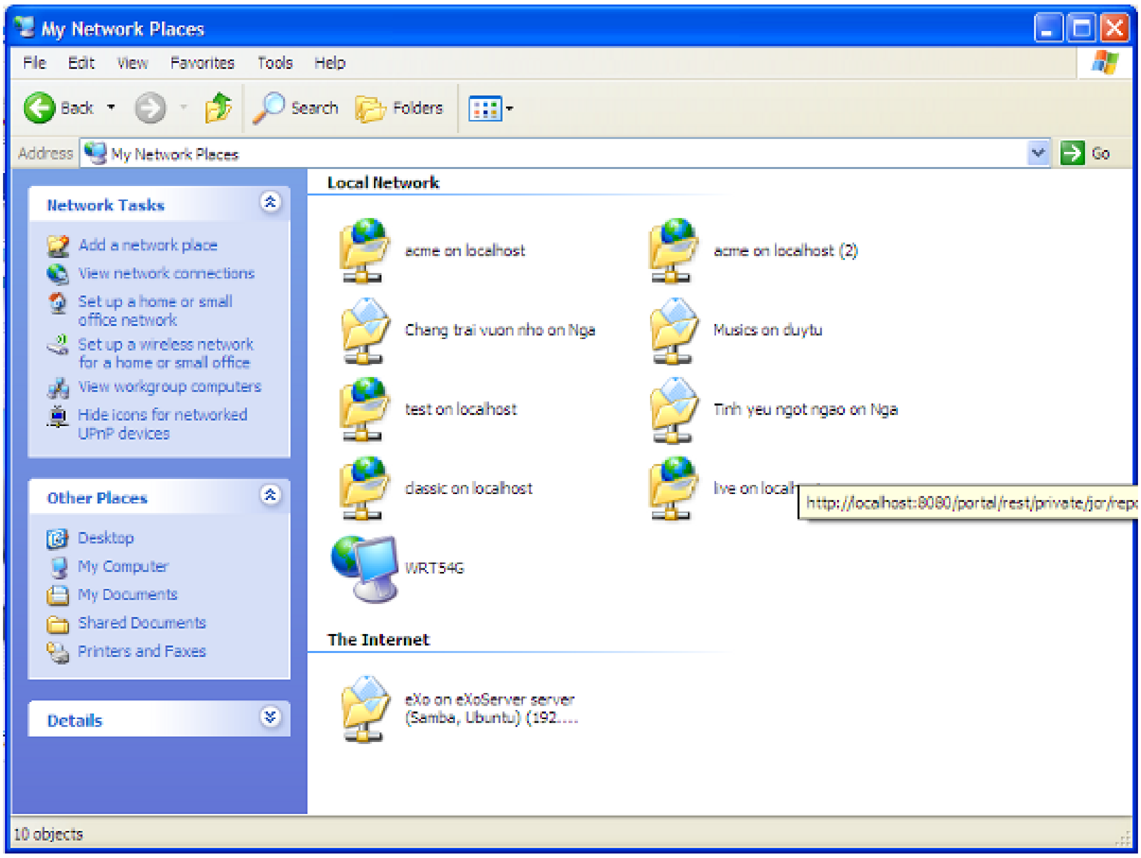
3. Click **Next** to choose a network location:



4. Select **Choose another network location** to create a shortcut.

5. Enter an address into the **Internet or network address** field. For 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` appears in the **My Network Places** directory.



Each site managed by WebDAV appears as a folder in this location.

7. You can take actions on the content in this folder to administrate the site content remotely.

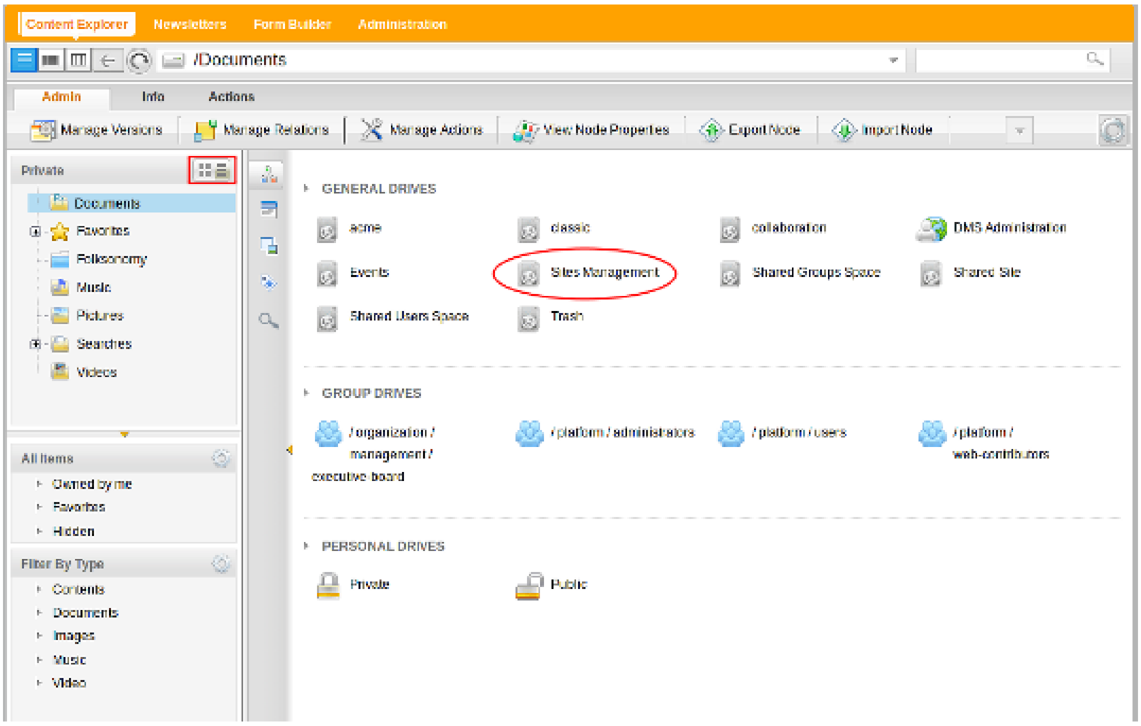
Procedure 4.89. Method Two: Sites Management

This method can be done using the *Sites Management* functionality of eXo Content:

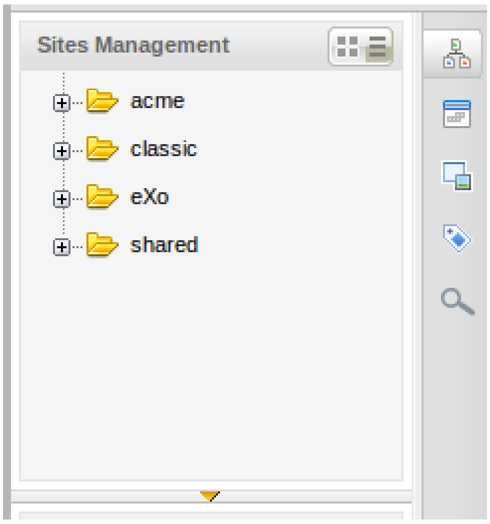
1. Navigate to *http://localhost:8080/portal* in your web browser.

2. Click **Group** → **Content Explorer** in the administration bar.

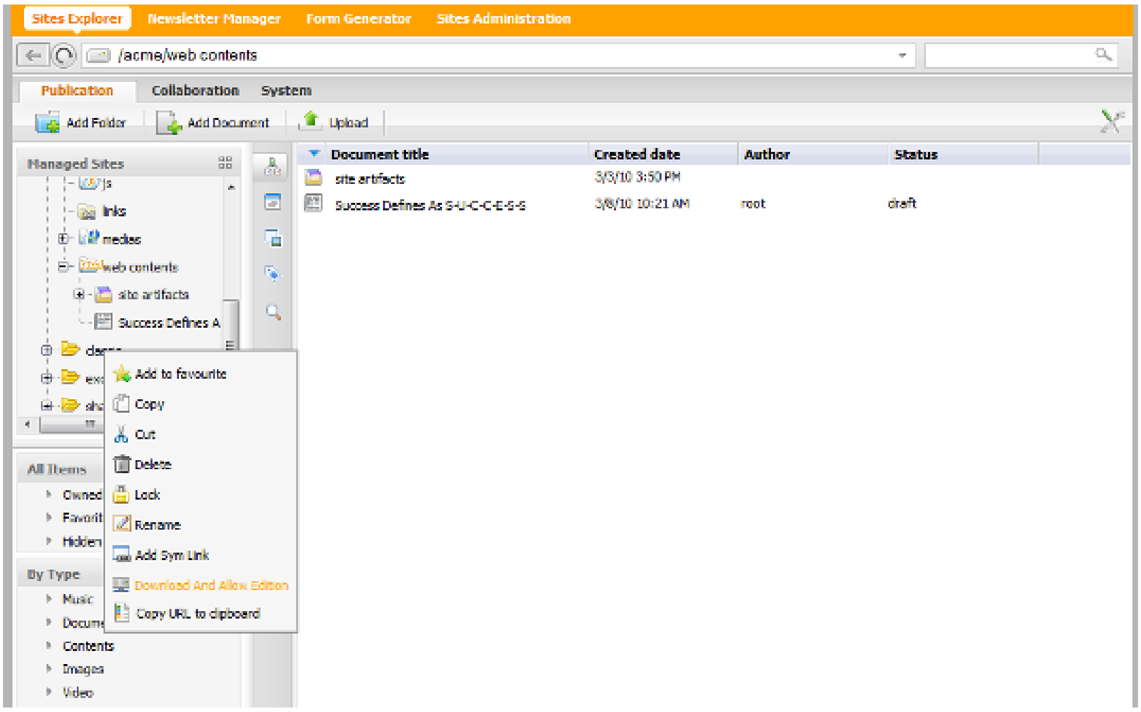
3. Click the **Drives** button then select **Sites Management**.



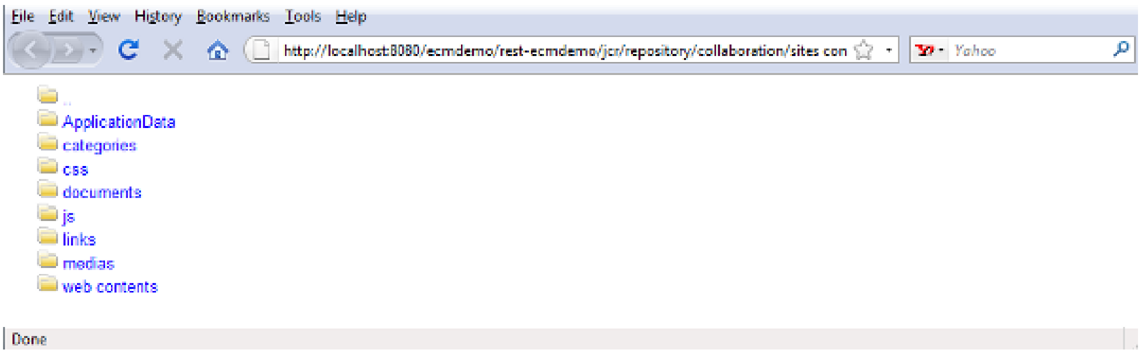
You will see all sites listed in the left sidebar:



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 access documents in the directories that are linked to the web server.

4.8.4. Actions

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

This allows you to copy or paste files, list folders, rename, and more in system directories.

4.8.4.1. Add new content to a specific site

This function enables you to copy web content (such as `.html` files) from your local computer to a web content folder of a site.

1. Access a site via WebDAV (refer to *Section 4.8.3, “How to Use WebDAV With eXo Content”*), then go to a web content folder within 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.

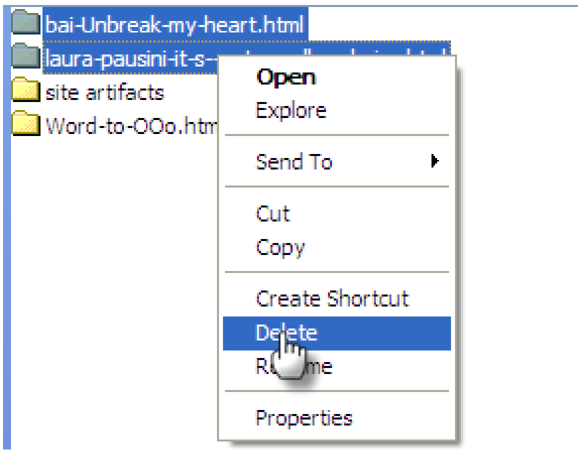
4.8.4.2. Delete a web content

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

Procedure 4.90.

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.

4.9. Search in Content Explorer

There are three ways to search an existing node:

1. *Section 4.9.1, "Quick Search"*.

2. *Section 4.9.2, "Advanced Search"*.

3. *Section 4.9.3, "Search with saved queries"*

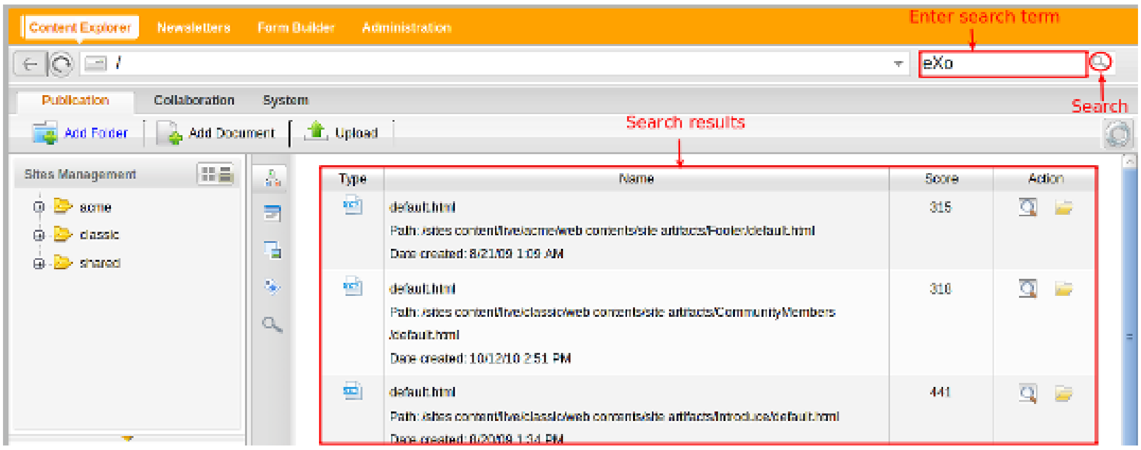
4.9.1. Quick Search

With the quick search, you can directly type a search term in the search field. All documents whose keywords match the search term are retrieved and listed in the **Search results** form.

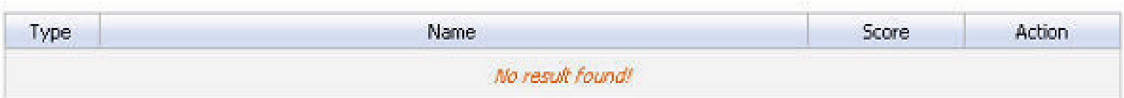
1. Enter a search string into the search text box.

2. Click the  icon to perform the search.

   Search results will be displayed in the right pane.



   The search results will be empty if no document contains the search string.



Type	Name	Score	Action
	No result found!		

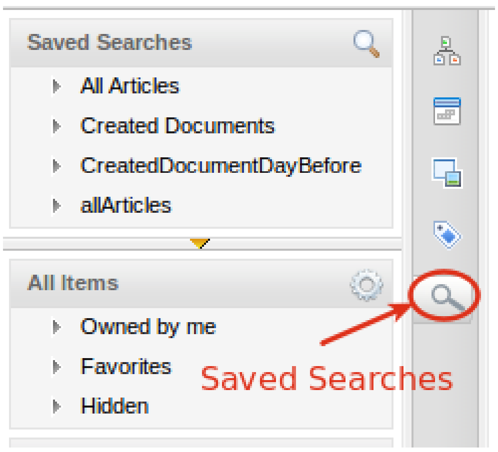
3. Click the  icon to view the content containing the search string.

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

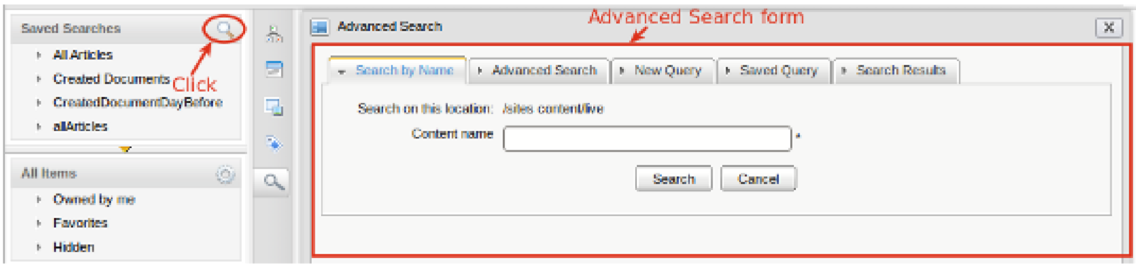
4.9.2. Advanced Search

To perform an advanced search:

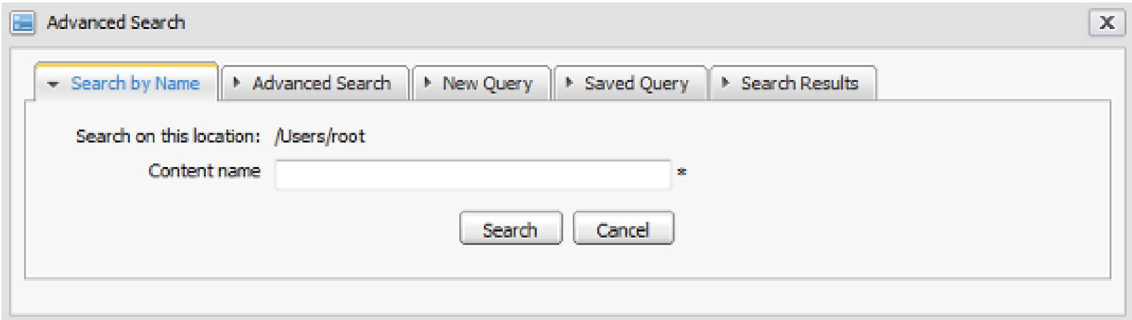
1. Click the  icon.



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 4.9.2.1, “Search by Name”*
- *Section 4.9.2.2, “Search with constraints”*
- *Section 4.9.2.3, “Search by creating a new query”*
- *Section 4.9.2.4, “Search by existing queries”*

4.9.2.1. Search by Name

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

1. Enter the exact name you wish to search in the **Content name** field.
2. Click **Search**.

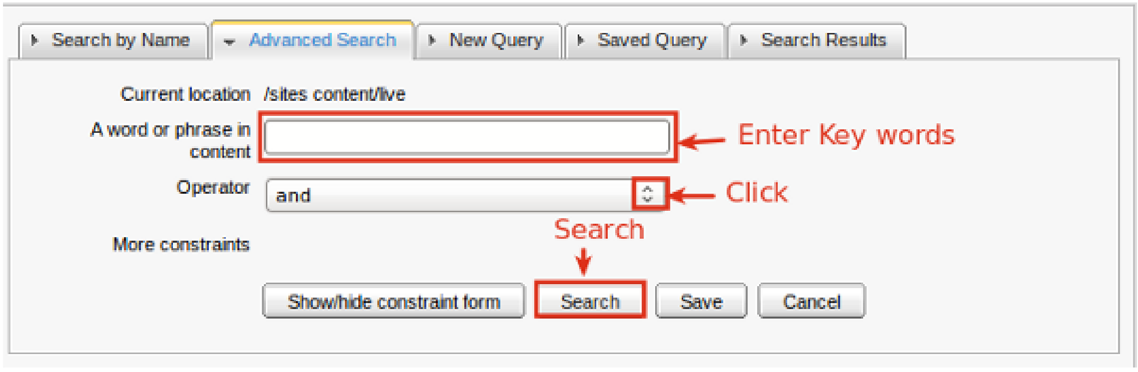
   Results will return with the message *“No result found”* if there is no node with the specified name.

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

4.9.2.2. Search with constraints

This search enables 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 4.91.

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

2. Select the **Operator**.

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

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

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

   A further constraint options window will appear:

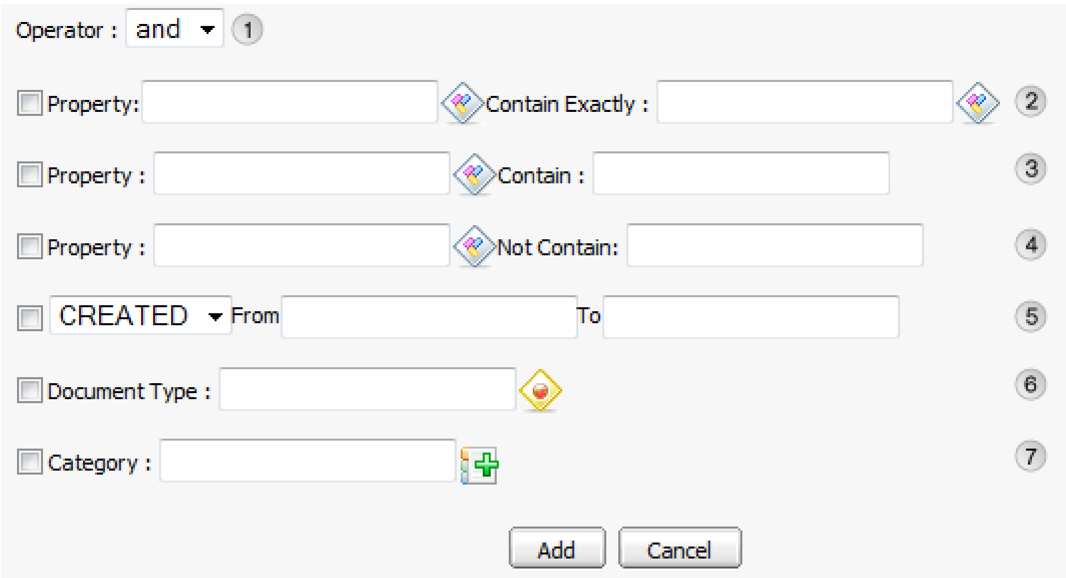
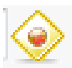


Table 4.25.

Item	Details
1	You can add more than one constraint with either of two operators (AND and OR).
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 that contains one of the word in the specific string.
4	These fields allow you to add a constraint to search by a property that does not contain the specific string.
5	These fields allow you to add a constraint to search by a duration of date (created, modified).
6	This field allows you to add a constraint to search by a document type, including File, Article, Podcast, Sample node, File Plan, Kofax).
7	This field allows you to add a constraint to search by categories.
	Add a document type.
	Add a category.

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

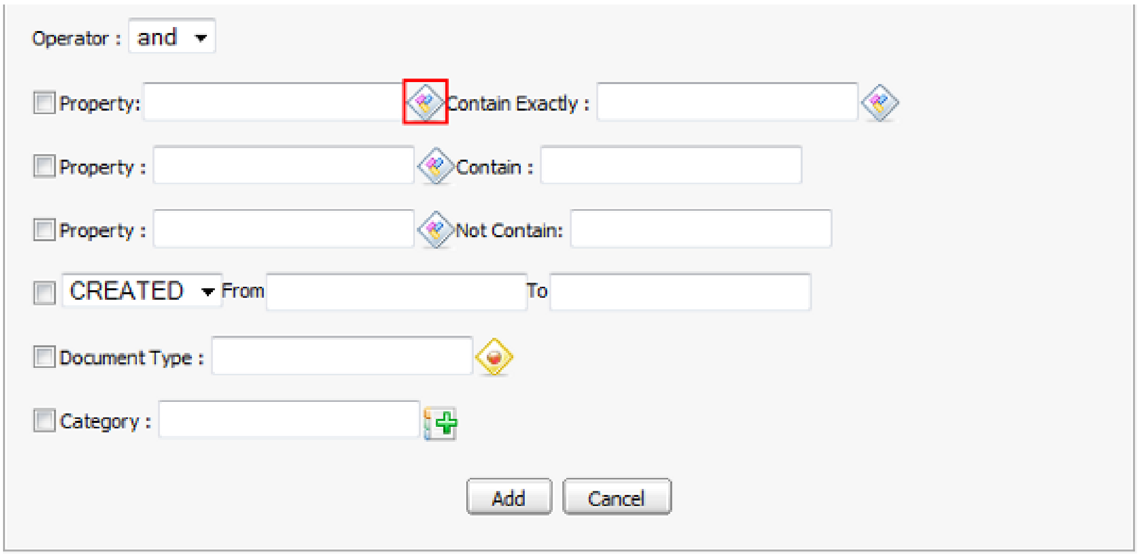
5. Add the required constraints using one of the following methods:

   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*

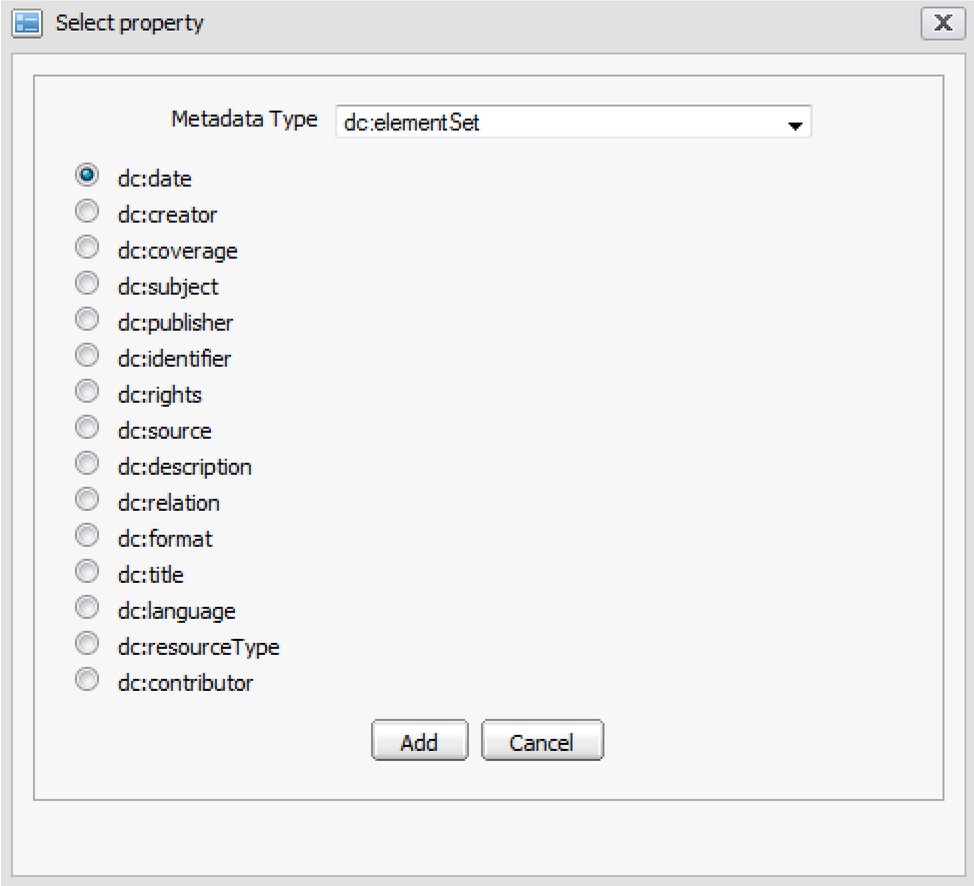
Procedure 4.92. Add a constraint for exact values

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

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

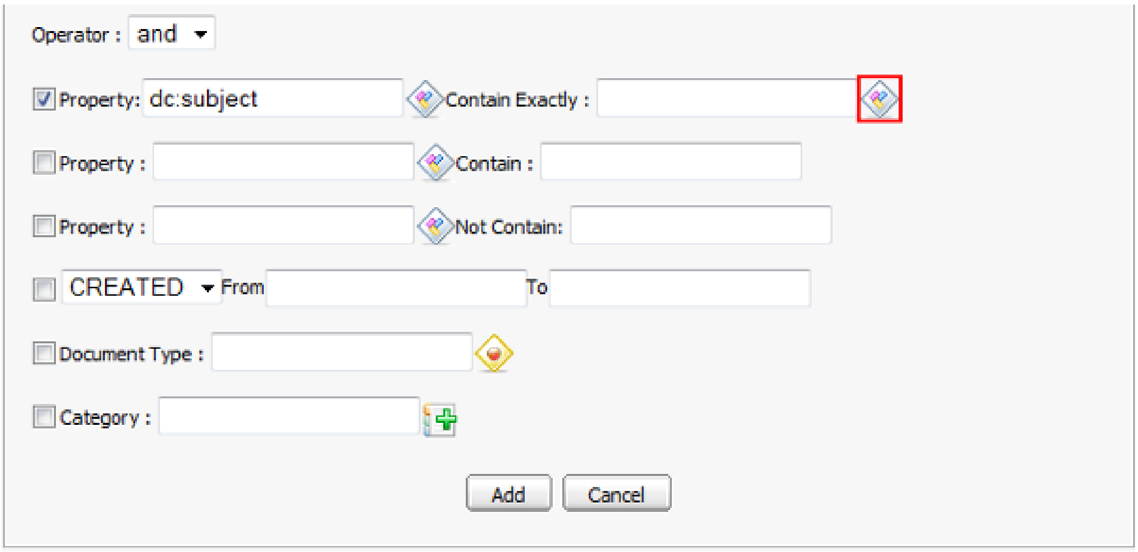


A list of possible properties appears:

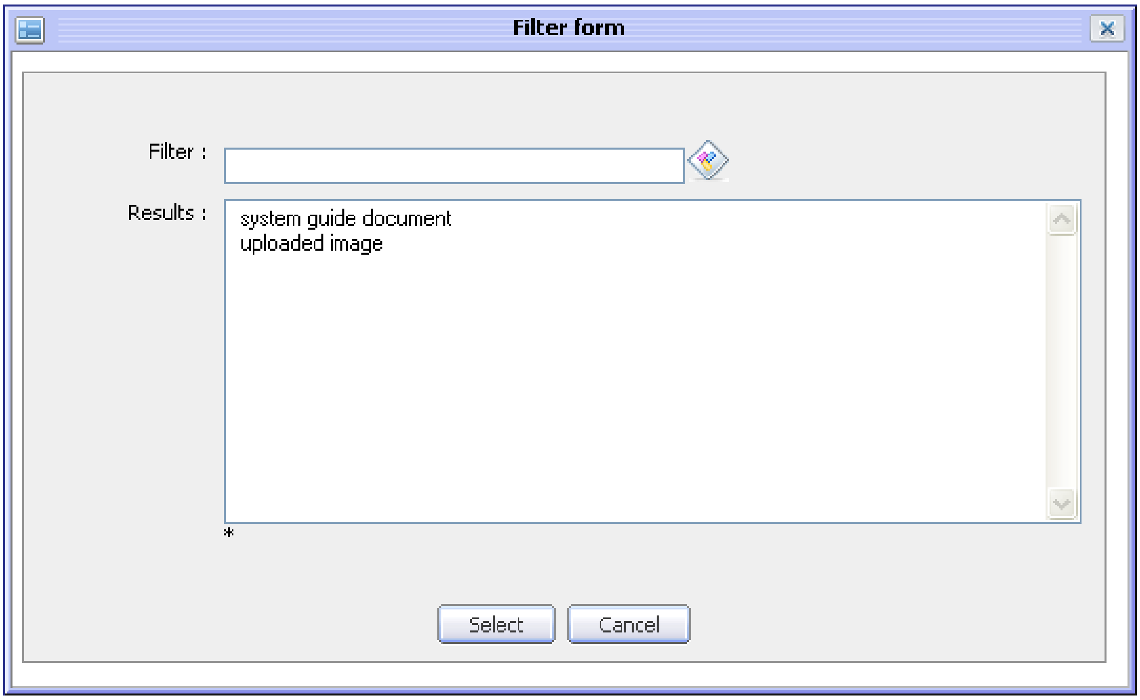


3. Select a property from the list and click **Add**. The selected property will populate **Properties** field.

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

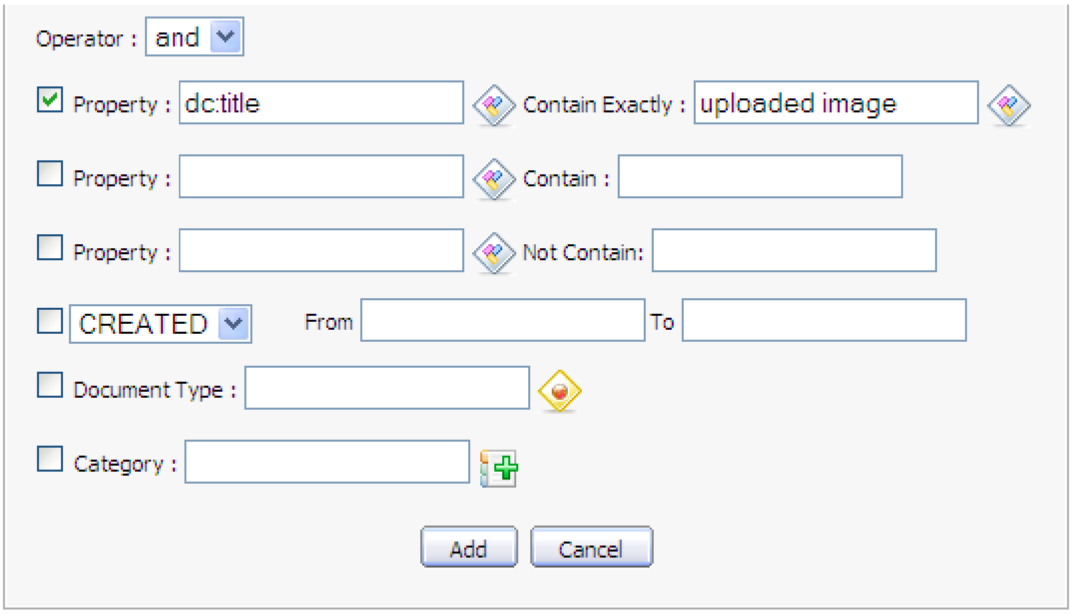


The **Filter form** will appear:



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

- If the value you require is in the list, select it and click **Select**.
- If the value you require is not in the list, enter it in the **Filter:** field and click the  icon. The value will populate the **Contain exactly** field of the constraints form.



Procedure 4.93. 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

   icon (refer to **Step 2** in *Add a constraint for exact values* for more information).

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

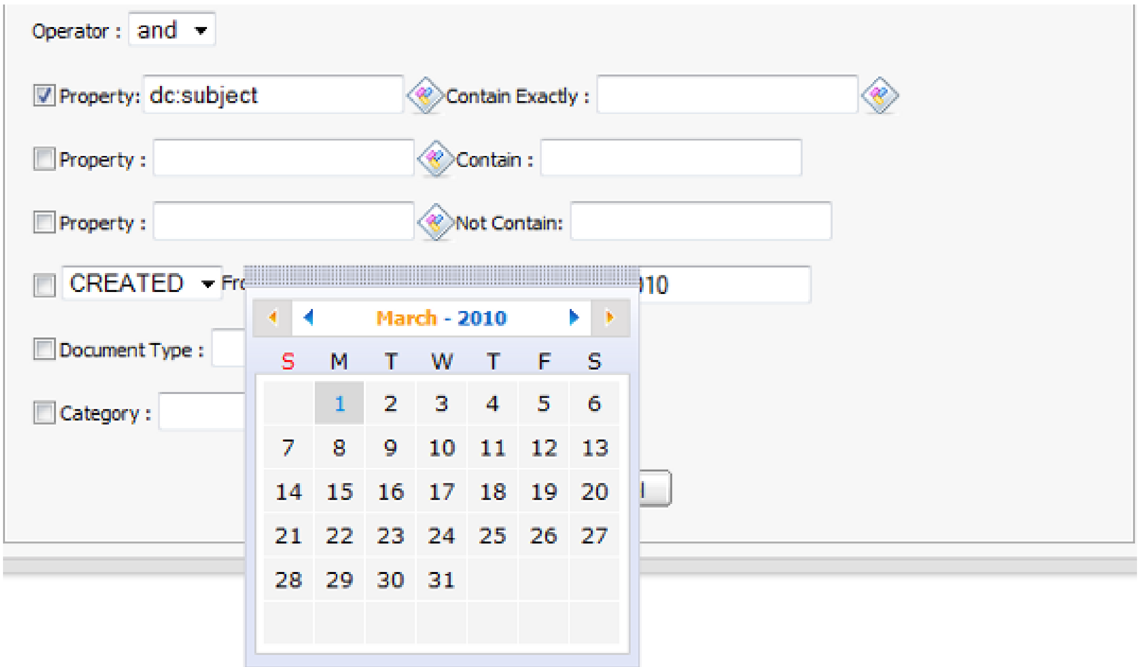
Procedure 4.94. Add a constraint by date

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

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

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

   A small calendar will appear;



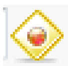
Select the date you want to use as a constraint.

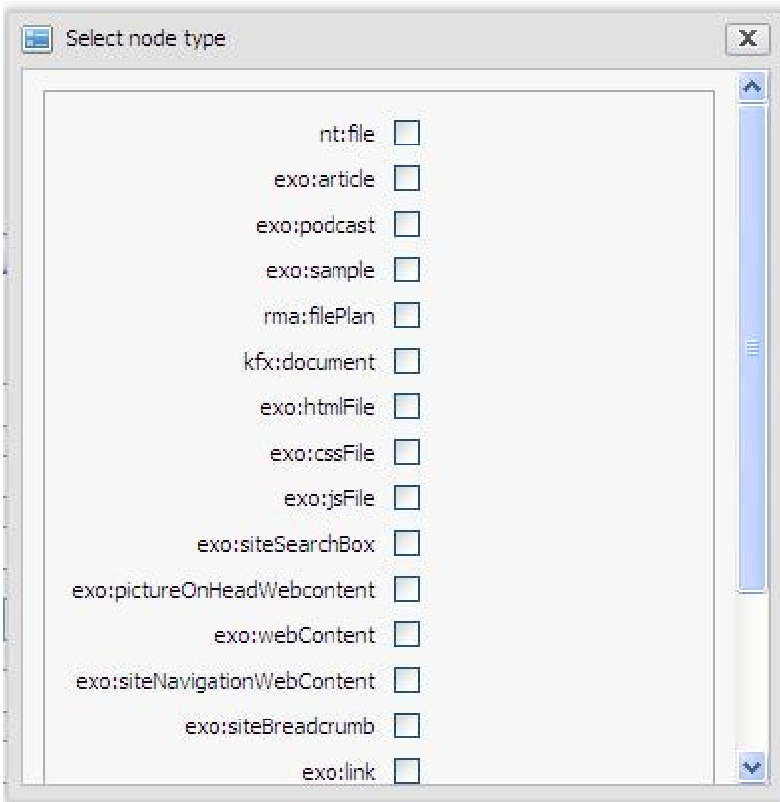
4. Repeat the above steps for the **To** field.

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

Procedure 4.95. Add a constraint by document type

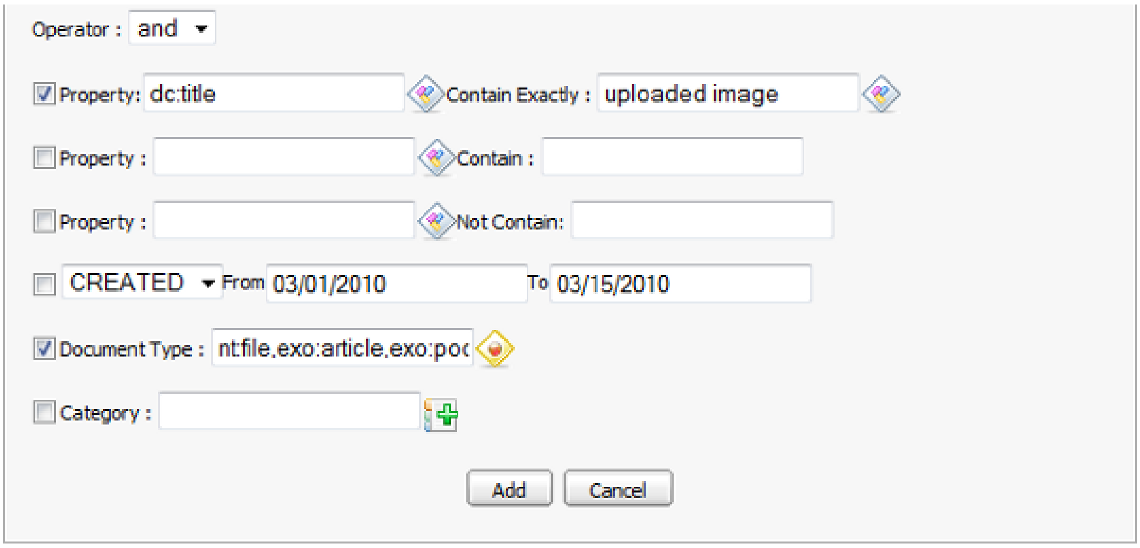
1. Click the checkbox beside the **Document Type** field.

2. Enter the document type you want to search for or click the  icon to open a list of document types:



3. Click the checkbox of the document type you want and click **Save**.

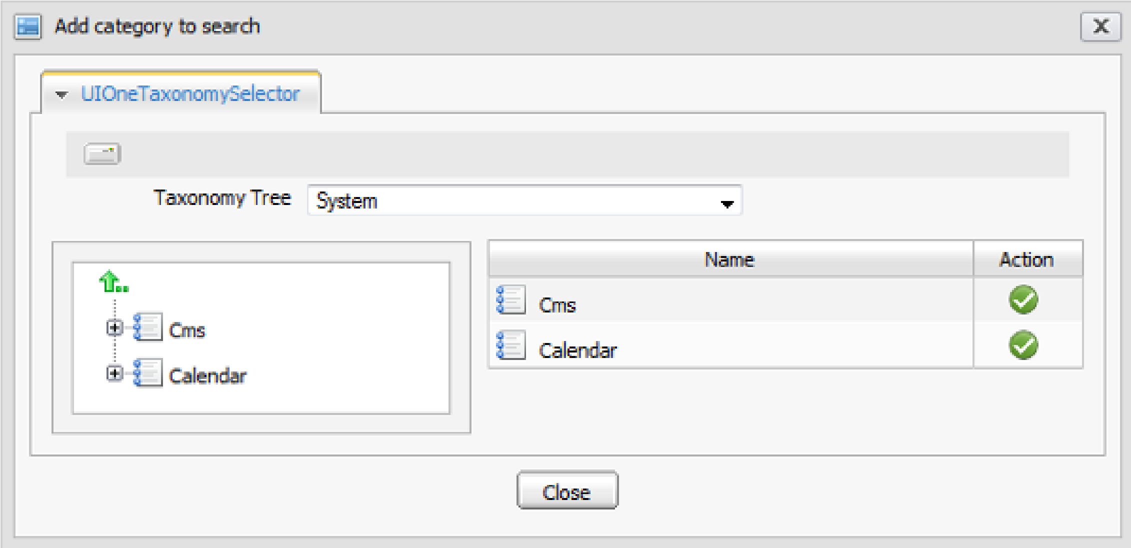
   The selected document type will populate the **Document Type** field.



Procedure 4.96. Add a constraint by category

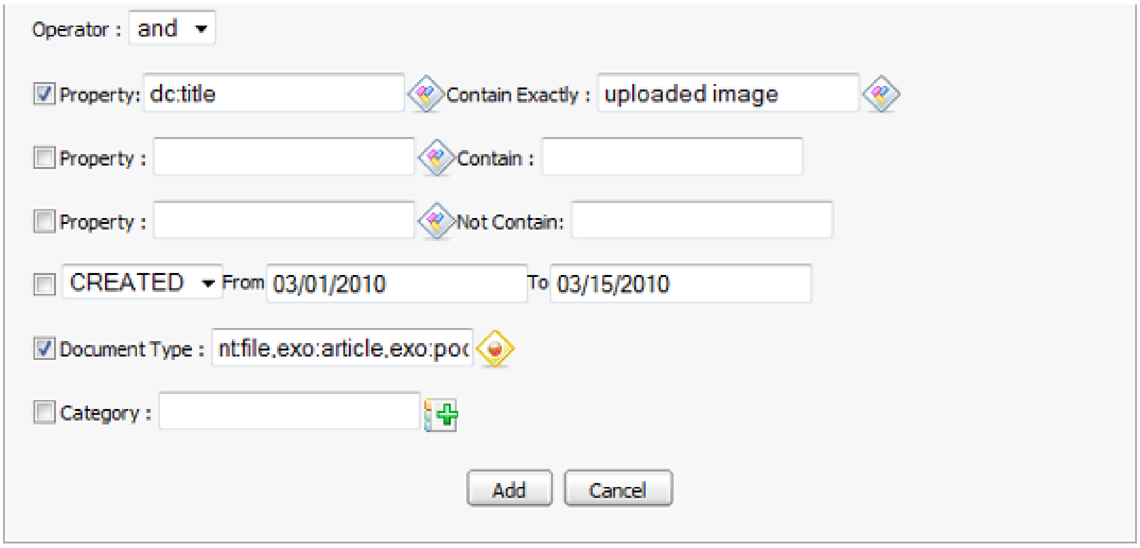
1. Click the checkbox beside the **Category** field.

2. Enter the category you want to search for or click the icon for a list of categories:



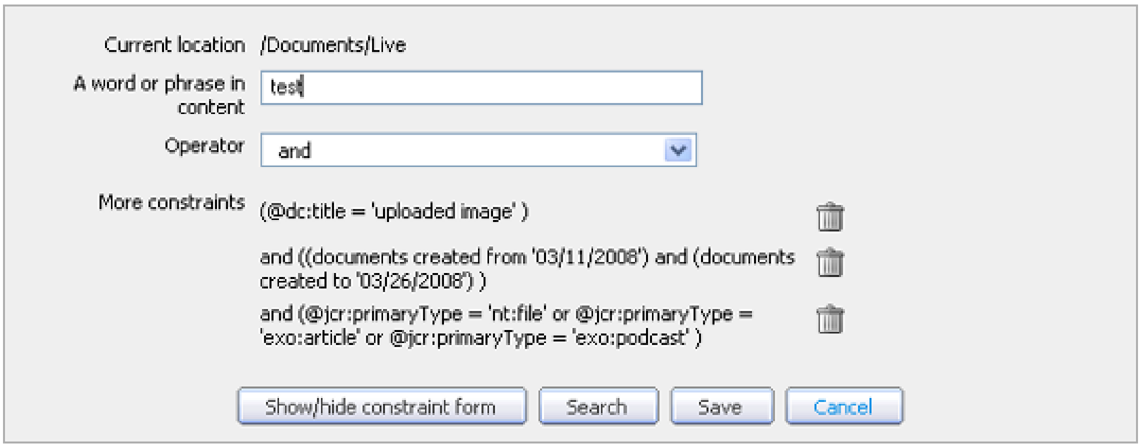
3. Click the that corresponds to the category you want.

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



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

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



Remove unnecessary constraints with the  icon.

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

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

4.9.2.3. 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.

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.

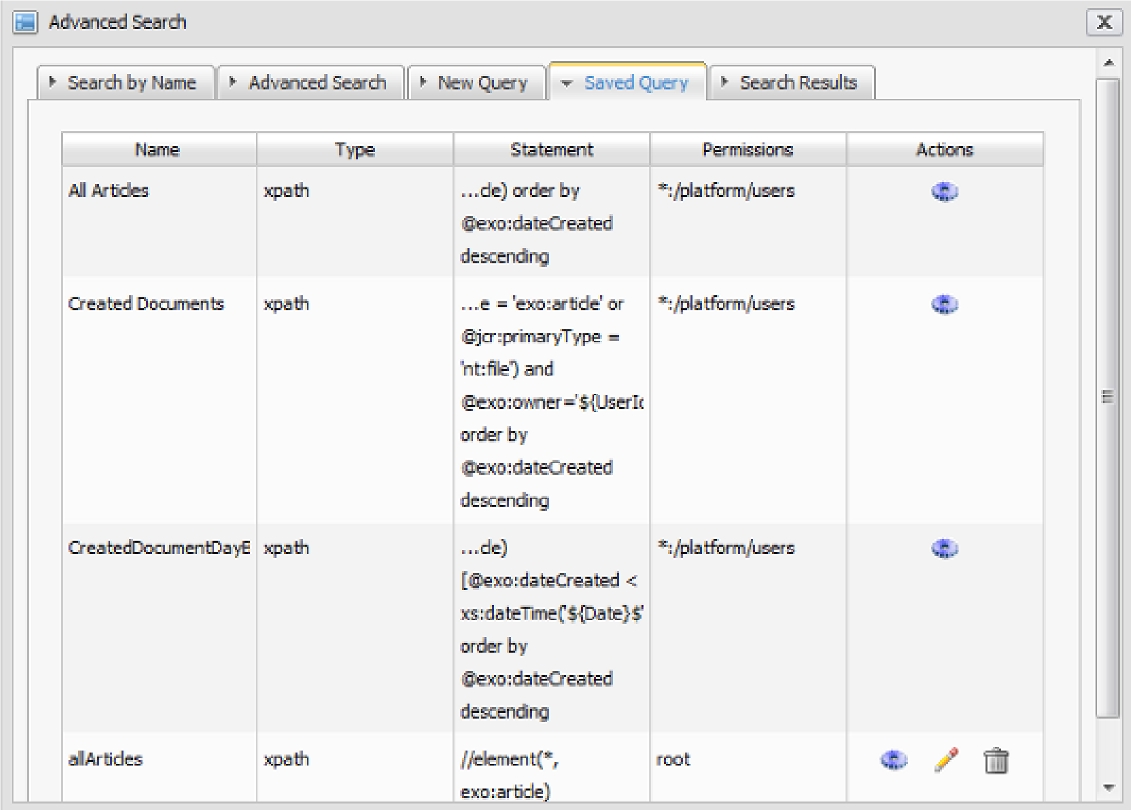
4. Click **Search** to perform the search and display the results in the **Search Results** tab.

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

   Or click **Cancel** to quit.

4.9.2.4. Search by existing queries

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

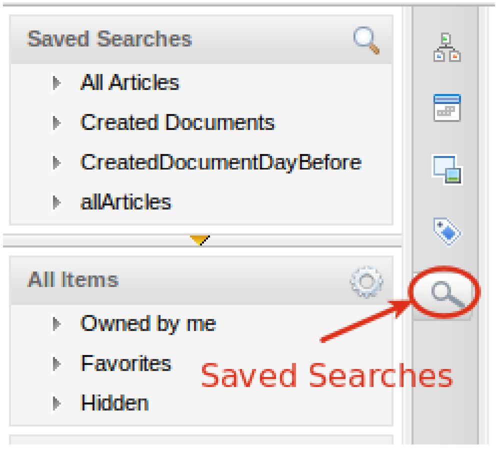


- Click the  icon to perform the search and see the results in the **Search Results** tab.
- Click the  icon to edit the query statement. The query form will appear like when creating a query (see *Section 4.9.2.3, “Search by creating a new query”*); however, you cannot edit the name of the saved search.
- Click the  to delete a query (provided you have the access rights to that query).

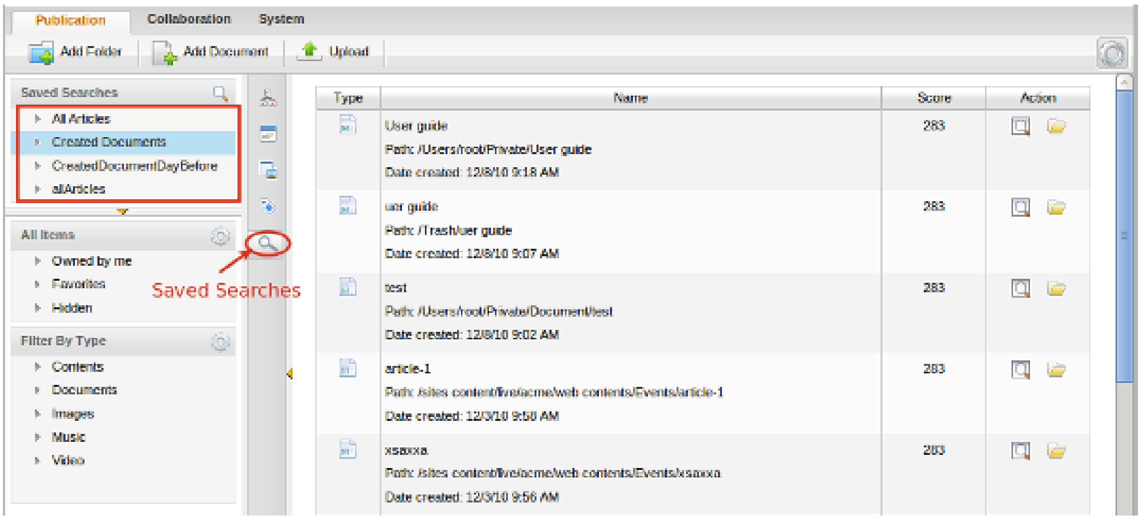
4.9.3. Search with saved queries

Do the following to perform a search with saved queries:

1. Click the  icon to see the list of existing queries.



A query list will appear. It contains the sections, including **All Articles**, **Created Documents**, **CreatedDocumentDayBefore** and **allArticles**.



2. Launch, modify or delete the queries as required (see *Section 4.9.2.3, “Search by creating a new query”* for more information).

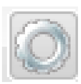
3. Filter results with the entries in the **All Items** and/or **By Type** panes on the left of the tab. Items matching the selections will appear in the right pane.

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

4.10. Preferences

This function is used to set up your browsing preferences.

Procedure 4.97.

1. Click the  icon on the right side of the **Content Explorer** portlet.

   The **Preference Setting** window will appear:

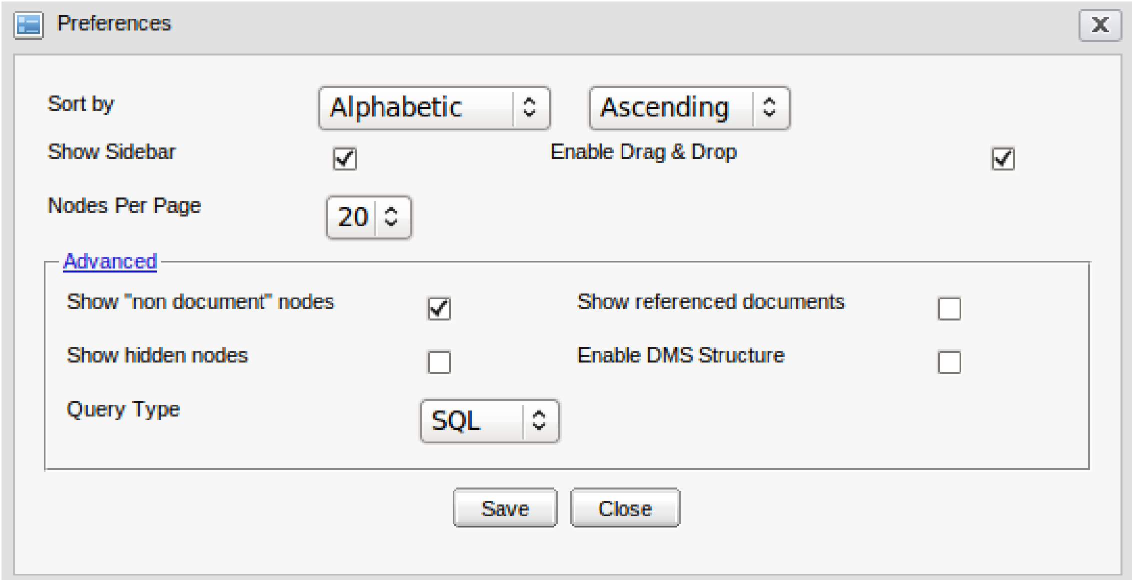


Table 4.26.

Setting	Details
Sort by	To sort nodes in the nodes list by Alphabetic, Type, Created Date, or Modified Date
Show sidebar	To display/hide the sidebar.
Enable drag and drop	To enable/disable the “drag and drop” action.
Nodes per page	This number of nodes that will be displayed per page.
Show non document nodes	To display/hide nodes that are non–documents.
Show referenced documents	To display/hide referenced documents.
Show hidden nodes	To display/hide hidden nodes.
Query Type	This query type.
Enable DMS structure	To display/hide 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.

4.11. Search Porlet

The **Search** function allows you to quickly search for any contents in the system with a keyword from the front page, even if you do not log in. However, the number of the search results displayed depends on your role.

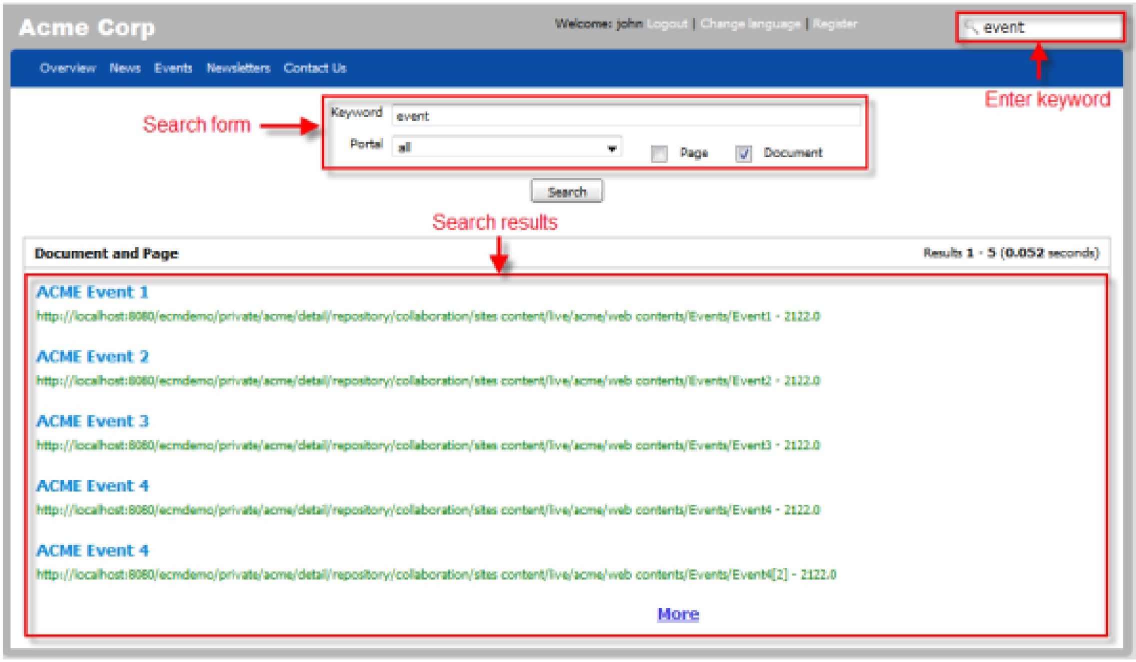
For example, if you do not log in, you only see the search results that are published.

4.11.1. How to search for contents?

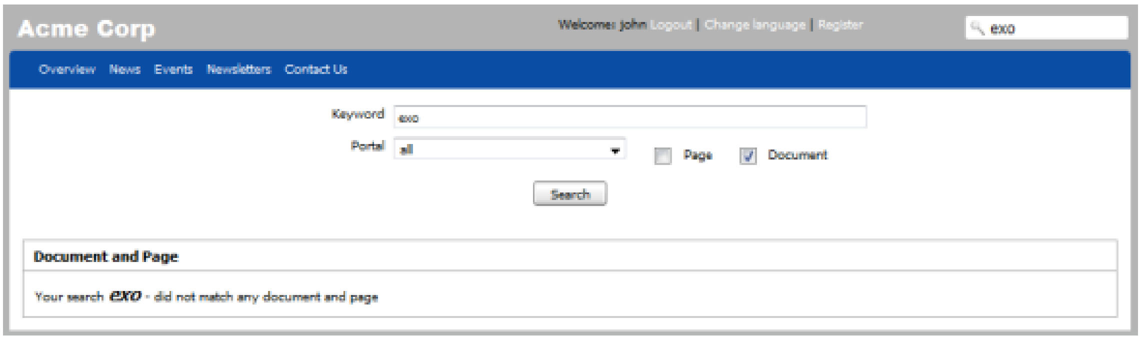
To search for contents, do the followings:

1. Enter a keyword into the search box and press **Enter**.

   The search results matching with your keyword are displayed in the search page:



   In case of no search results matching the keyword, the search page is displayed as below:



   Details of the Search form:

Table 4.27.

Field	Details
Keyword	The keyword used to search.
Portal	The scale where you want to search. You can search in all portals or in a specific portal.
Page	Search in all pages containing the keyword.

Field	Details
Document	Search in all documents containing the keyword.

2. In the Search form, you can enter another keyword in the **Keyword** field and set the the search scale.

3. Click **Search** to start searching.

4.11.2. Edit the Search portlet

Editing the Search portlet allows you to change the display of search results.

Do the followings:

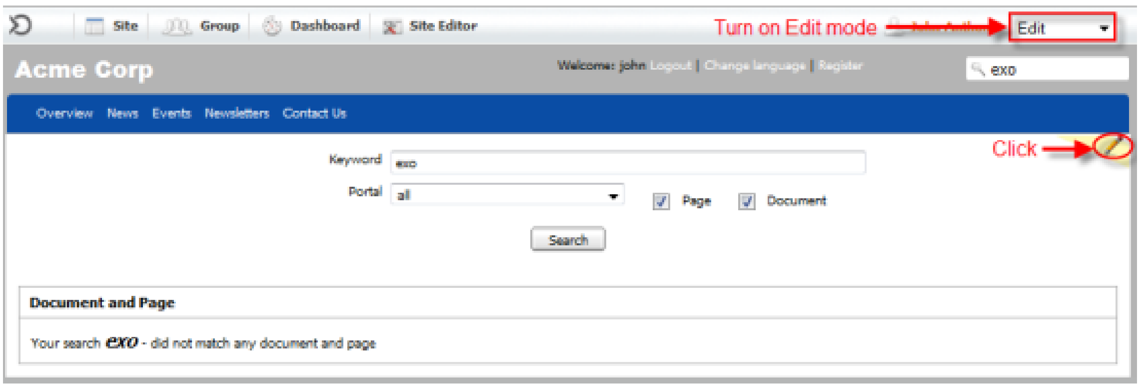
Procedure 4.98. Edit the Search portlet

1. Open the Search page as *Section 4.11.1, “How to search for contents?”*.

2. **Open the form to edit the Search portlet**

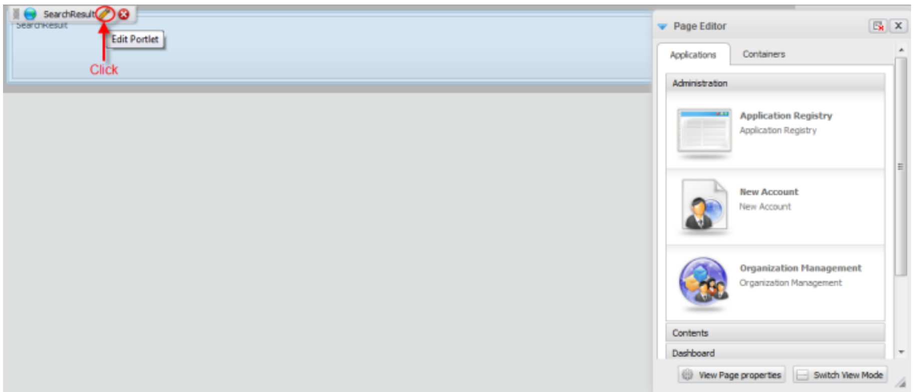
   There are two ways:

   - **The 1st way**: Turn on the Edit mode, and then click the  icon:



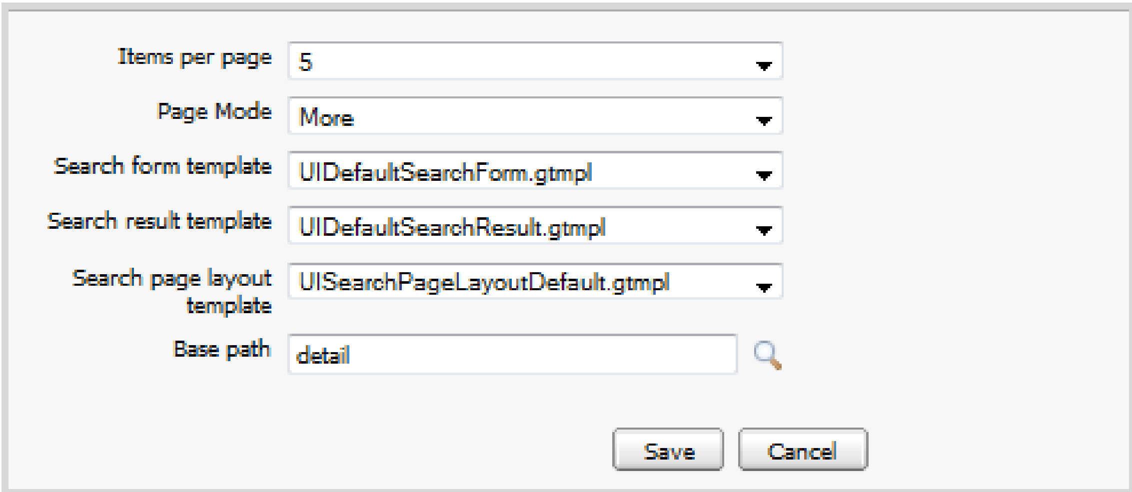
   - **The 2nd way**: Click **Site Editor** → **Edit Page** on the administration bar. The **Page Editor** will be displayed.

     - Hover the mouse pointer over the **SearchResult** portlet and the toolbar appears:



- Click the  icon to edit the portlet.

The form to edit the Search portlet appears:



Details:

Table 4.28.

Field	Details
Items per page	The number of search results displayed in each page.
Page Mode	The way to display the search results. There are 3 options: • **None**: Only the first page of search results is displayed in the search page. • **More**: When you click the **Search** button, the first page of search result is displayed. The difference from the **None** mode is

Field	Details
	that, there is a **More** button allowing you to see more search results. When clicking this button, new search results are appended to the current search result page like Twitter or Facebook behavior. • **Pagination**: In this mode, the search results are divided into many pages (for example, 1, 2, 3 and Next). You can navigate to another page by clicking the page number or **Next** in the bottom of the Search portlet to view more results.
Search form template	The template of the Search form.
Search result template	The template for displaying the search results.
Search page layout template	The layout of the Search portlet.
Base path	The page where you can see the content of a search result.

3. Edit your desired portlet and click **Save** to accept your changes.

4.12. Newsletters

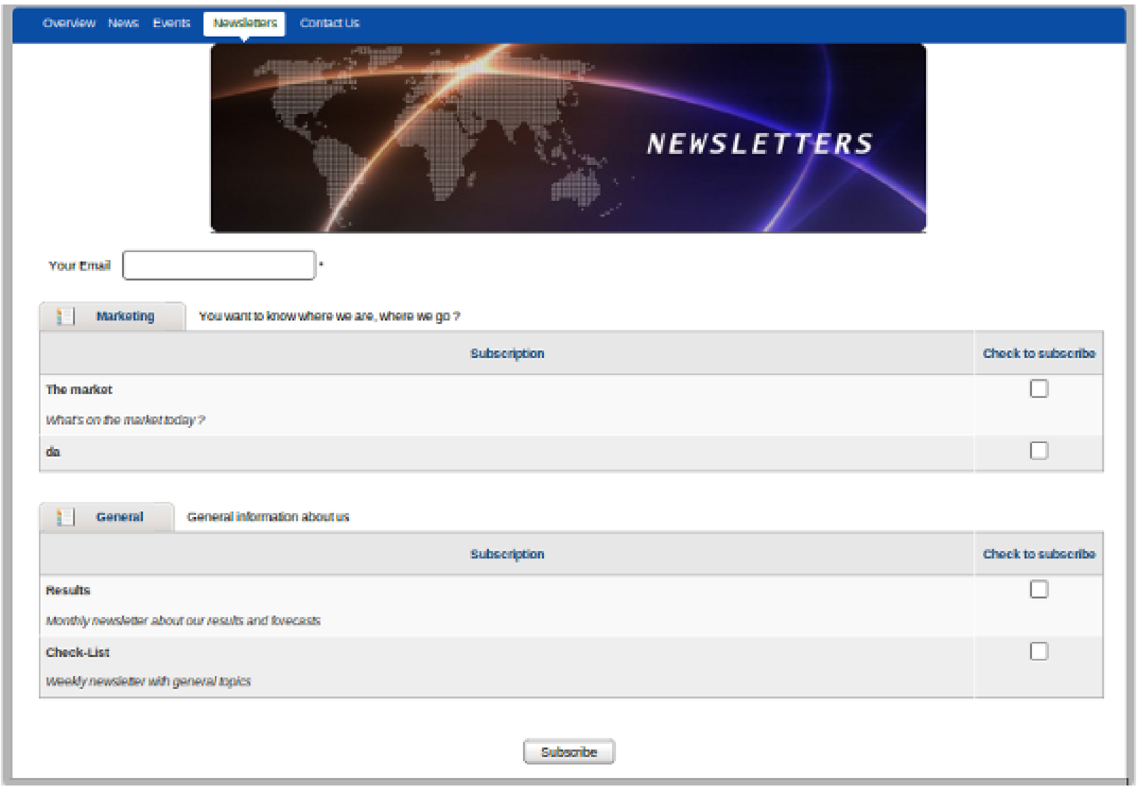
eXo Content provides a newsletter service aimed at helping users quickly get updated news from a website.

4.12.1. Newsletter Viewer

With *Newsletters*, you can instantly get newsletters from your email to update the last information about categories and subscription.

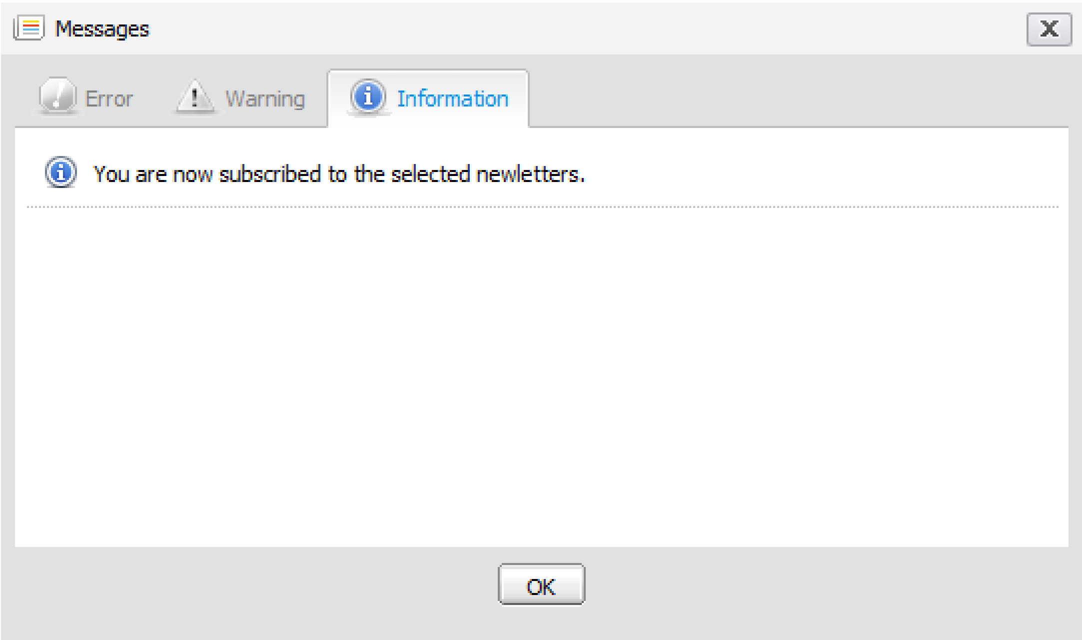
Do the following to subscribe to newsletters:

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



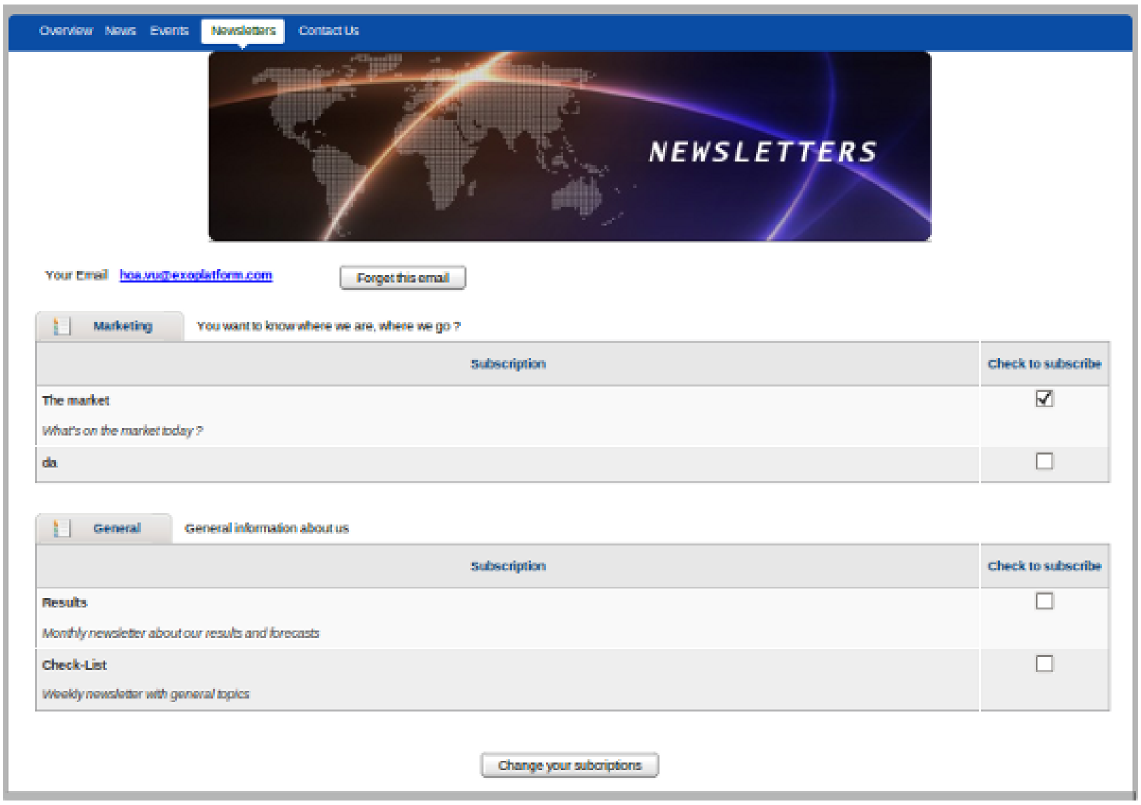
2. Enter your email address in the **Your Email** field.

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



4. Click **Subscribe**. A message informs 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 checkbox in the **Check to subscribe** column.

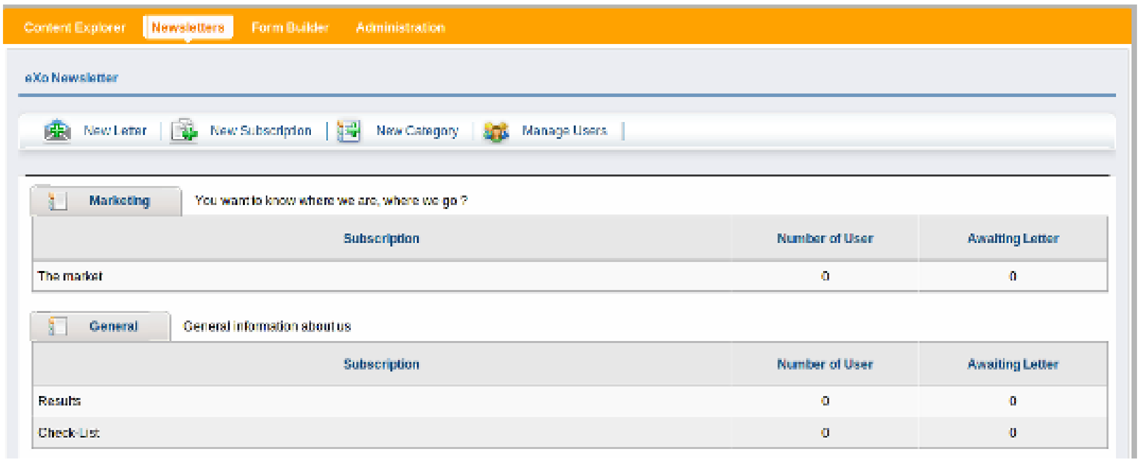


6. Click **Change your subscriptions** to update your changes.

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

4.12.2. Manage Newsletters

eXo Content allows administrators to easily and quickly manage newsletters. Go to **Group** → **Newsletters** on the administration bar to access the Newsletters functionality.



4.12.2.1. Category Management

Administrators can manage the *categories* that newsletters are distributed under.

4.12.2.1.1. Add a new category

Procedure 4.99. Add a new category

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

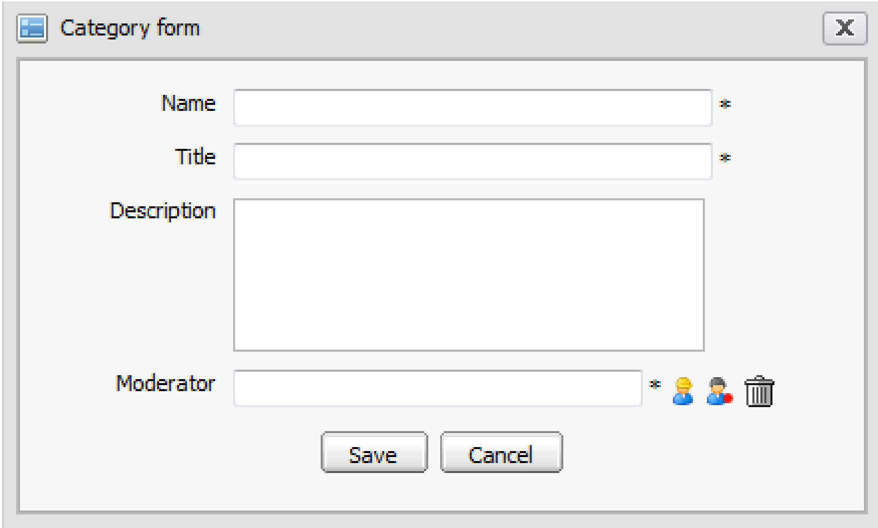
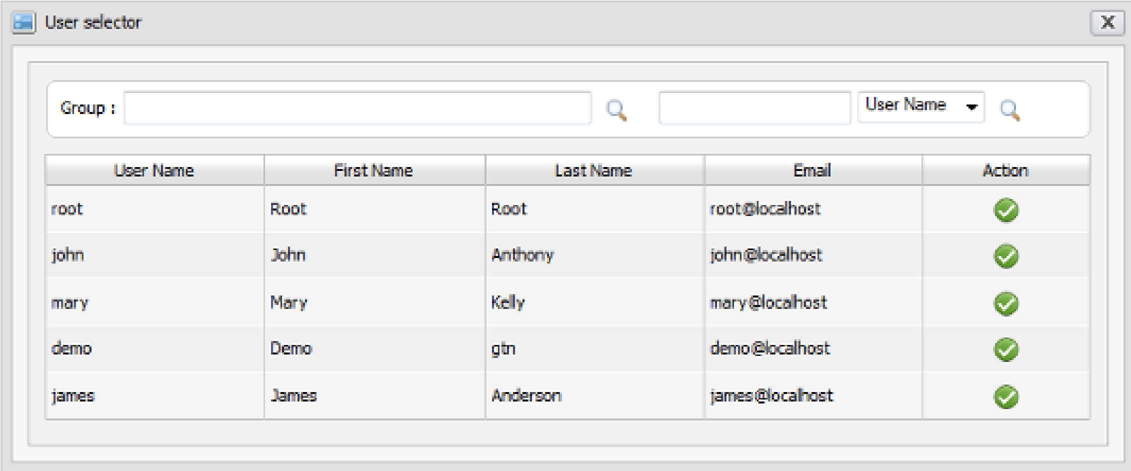


Table 4.29. Category Form Field Details

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	Select users/groups who have rights to manage this category.
Save	Accepts the addition of a new category.
Cancel	Quits the category form without adding a category.

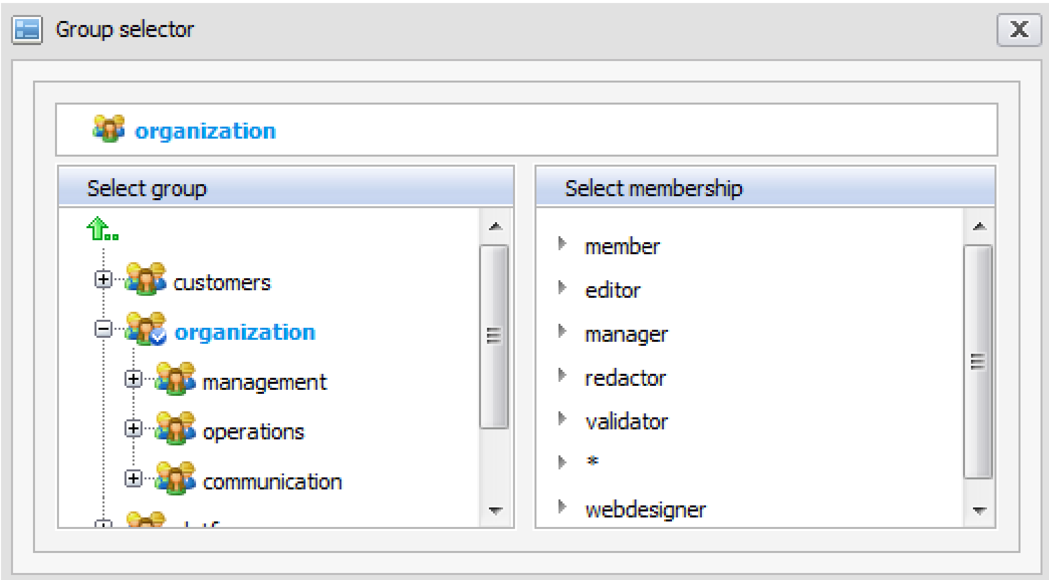
2. **Input values for fields**

   a. Select a moderator for a category by clicking the  icon next to the Moderator field to select a user. The form to selet users will appear.



b. Click the corresponding to the user in the list that you want to select.

c. Click the icon to select users in a specific group. The **Group selector** will appear.



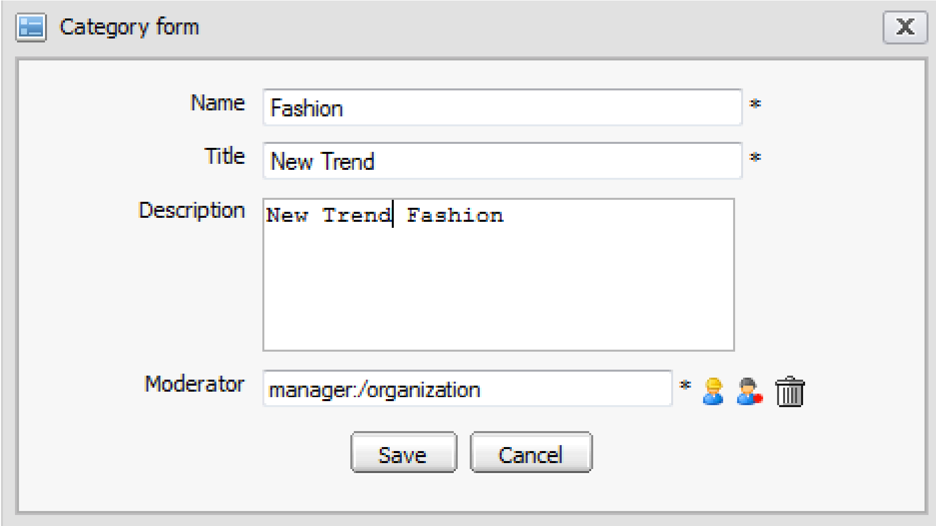
Select a group from the left panel and a membership type in the right panel. The membership and group selected will be displayed in the **Moderator** field. After adding new categories, they will be added in the list of categories.

After creating a category, you can create new subscriptions or newsletters for this category.

When you click the **Administration** button, you will see a drop-down menu consisting of all actions on this category.

4.12.2.1.2. Edit a category

1. Select a category that you want to edit and click **Administration** → **Edit Category** in the drop-down menu to bring up the Category form.



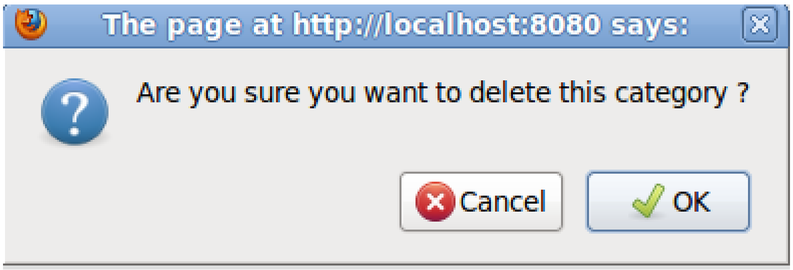
2. Change the values in the **Title** and **Description** fields as required (Note that you cannot change the name of the category).

3. Click **Save** to save all changes.

4.12.2.1.3. Delete a category

Procedure 4.100. 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.

4.12.2.1.4. Manage Users

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

Procedure 4.101.

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

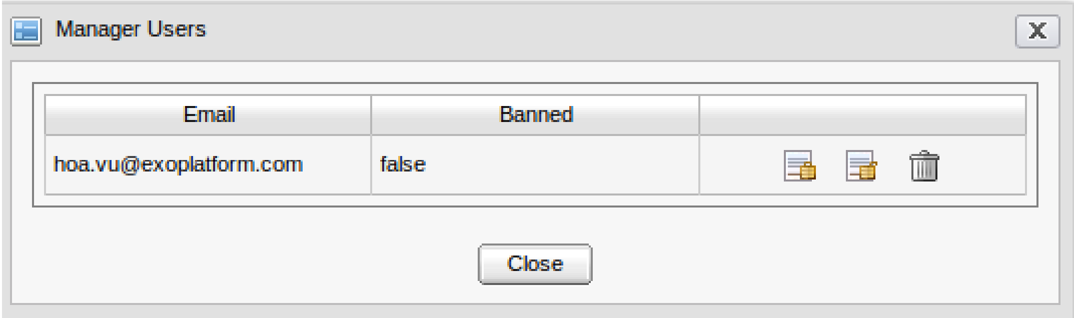


Table 4.30.

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 is not allowed to get email.
	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.

4.12.2.2. Subscriptions

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

Procedure 4.102. Method One:

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

   The **Subscription** form will appear:

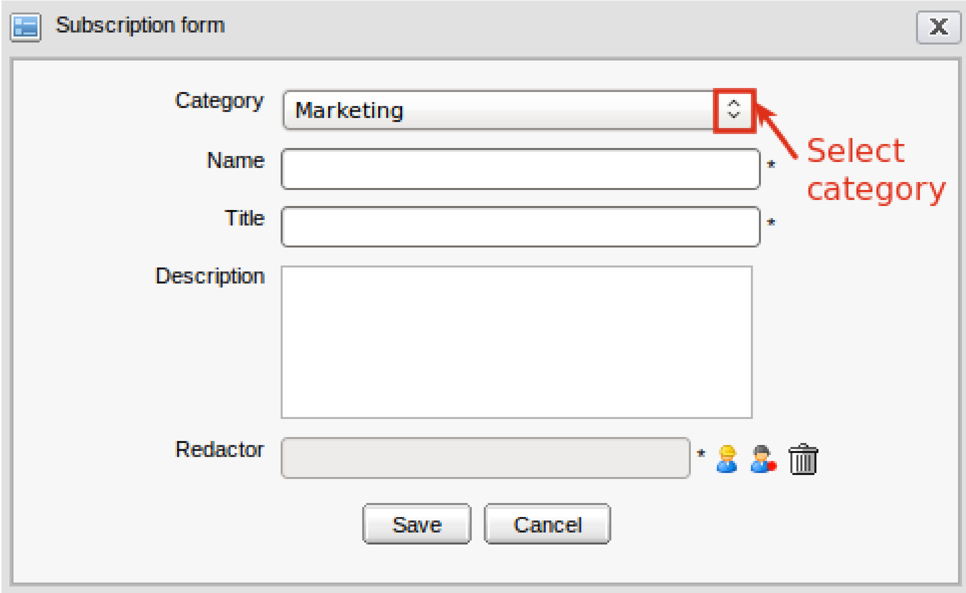


Table 4.31.

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	Select users/groups who have rights to manage this subscription This field is required.

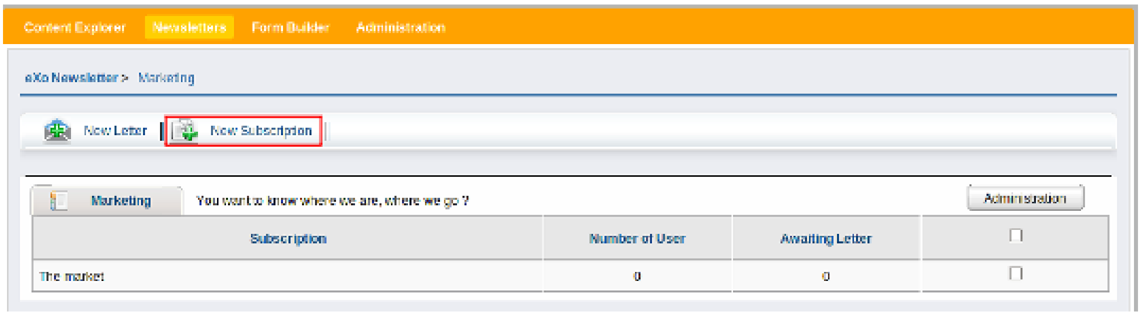
2. Click the icon and select the category from the drop-down menu.

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.

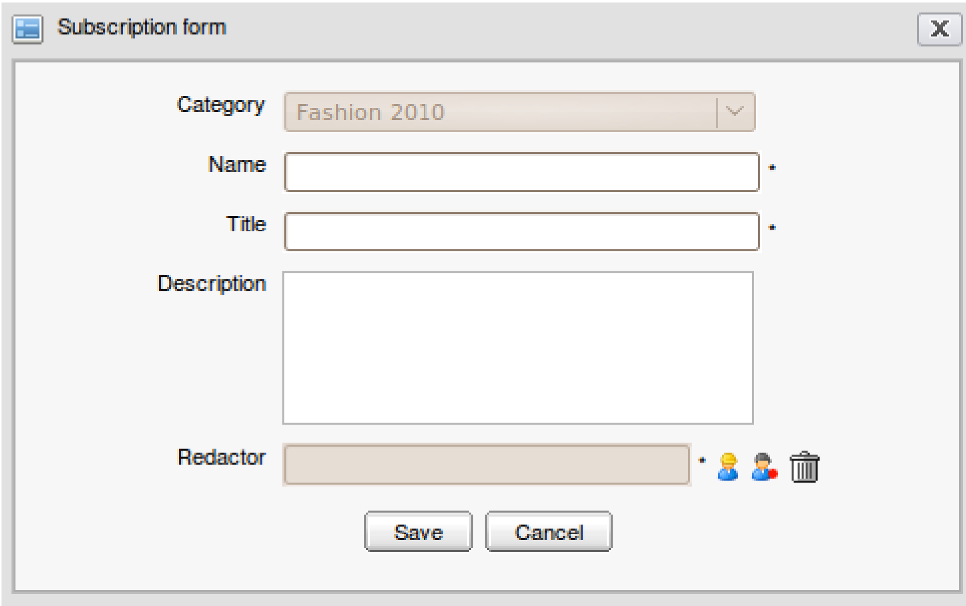
Procedure 4.103. Method Two:

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



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

   The **Subscription** form appears:



Follow the same steps as **Method One**.

Administrators can create newsletters for each subscription.

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

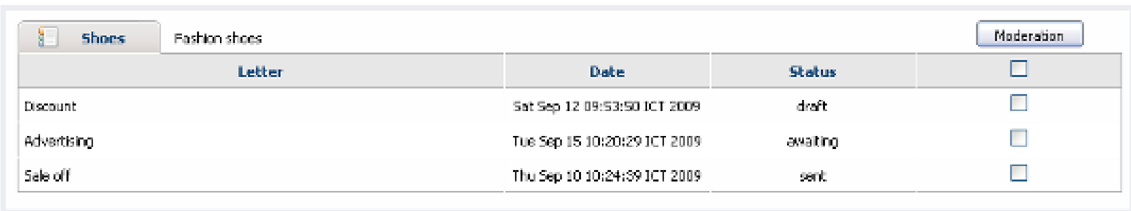


Table 4.32.

Element	Details
Shoes	The name of the subscription.
Fashion Shoes	The brief description about the subscription.
Letter	The list of all letters of this subscription.

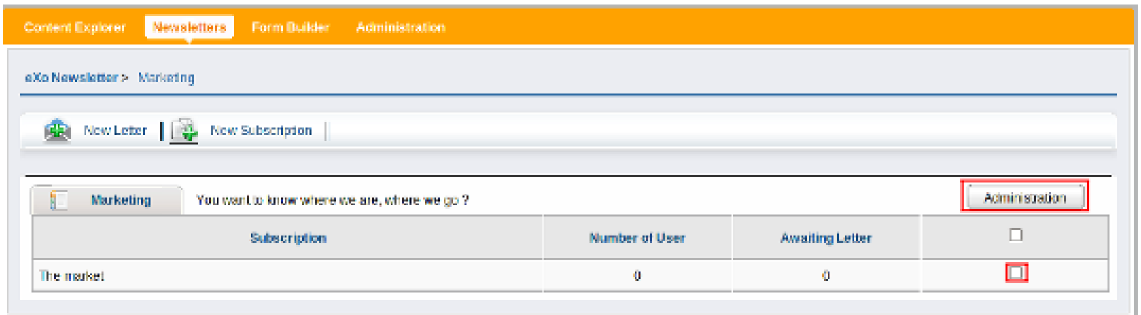
Element	Details
Date	The date and time when creating this letter.
Status	There are three types of status: draft, awaiting and sent.
Moderation	This button allows you to take actions on a newsletter that you select.

4.12.2.3. Open a Newsletter

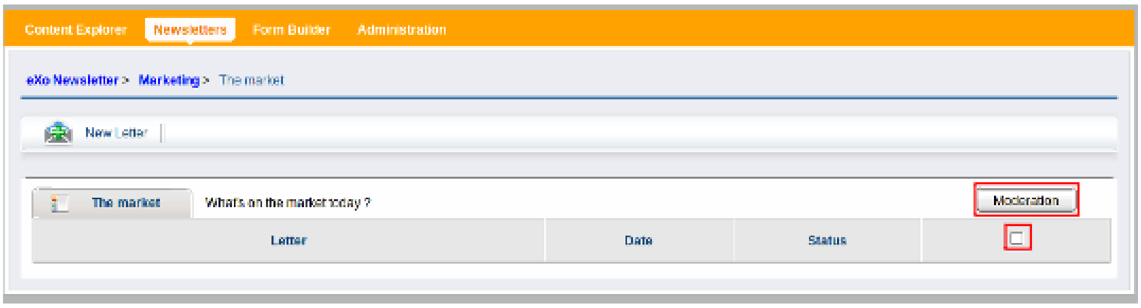
Administrators can easily view the content of a newsletter.

Procedure 4.104.

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

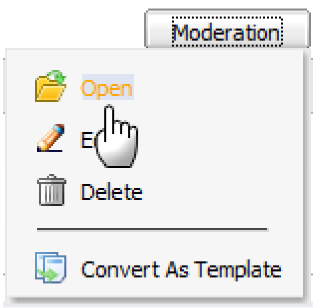


2. Select the newsletter that you want to open by clicking it or selecting the checkbox.

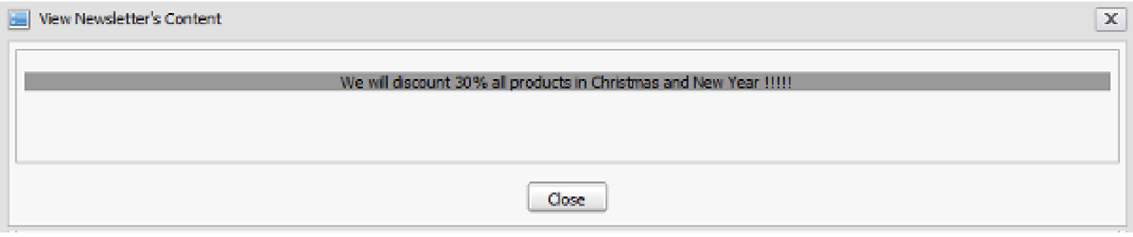


3. Click the 

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



The **View Newsletter's Content** form appears:



4. Click **Close** to exit.

4.12.2.4. Edit a newsletter

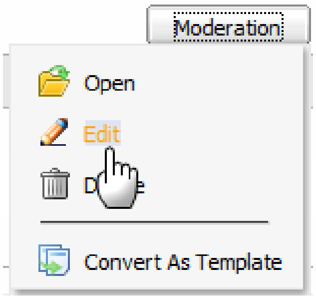
Do the following to edit a newsletter.

Procedure 4.105. Edit a newsletter

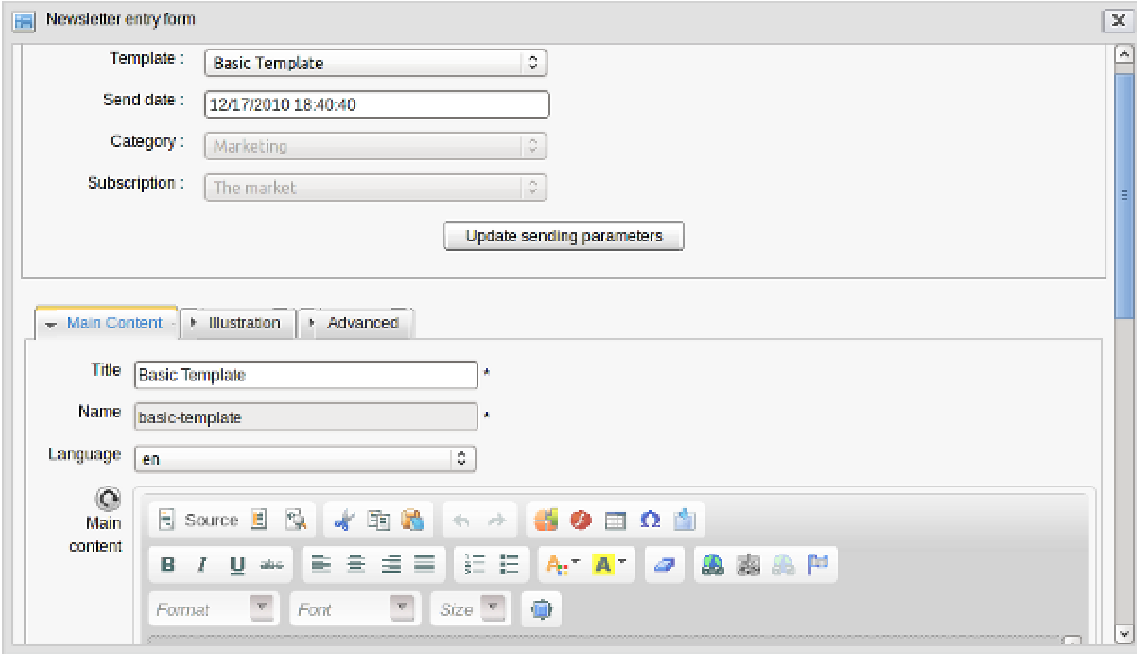
1. In a specific subscription, select the newsletter you want to edit by selecting the checkbox.

2. Click the 

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



The **Newsletter entry form** appears:



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**.

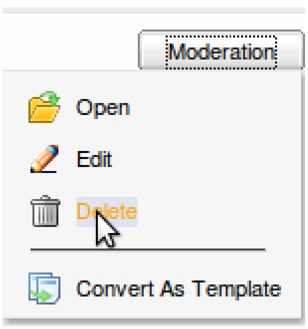
6. Click **Save** to save as a draft or click **Send**.

4.12.2.5. Delete a newsletter

Administrators can delete obsolete newsletters.

Procedure 4.106. Delete a newsletter

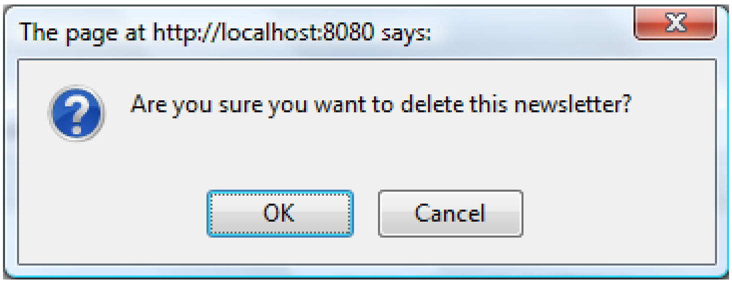
1. In a specific subscription, select the newsletter that you want to delete by selecting the checkbox.



2. Click the 

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

A confirmation message will be displayed:



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

4.12.2.6. Convert as Template

Administrators can reuse a popular newsletter template.

Procedure 4.107. Convert to template

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

2. Click the 

button 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 of the **Newsletter entry form**.

4.12.2.7. Newsletters

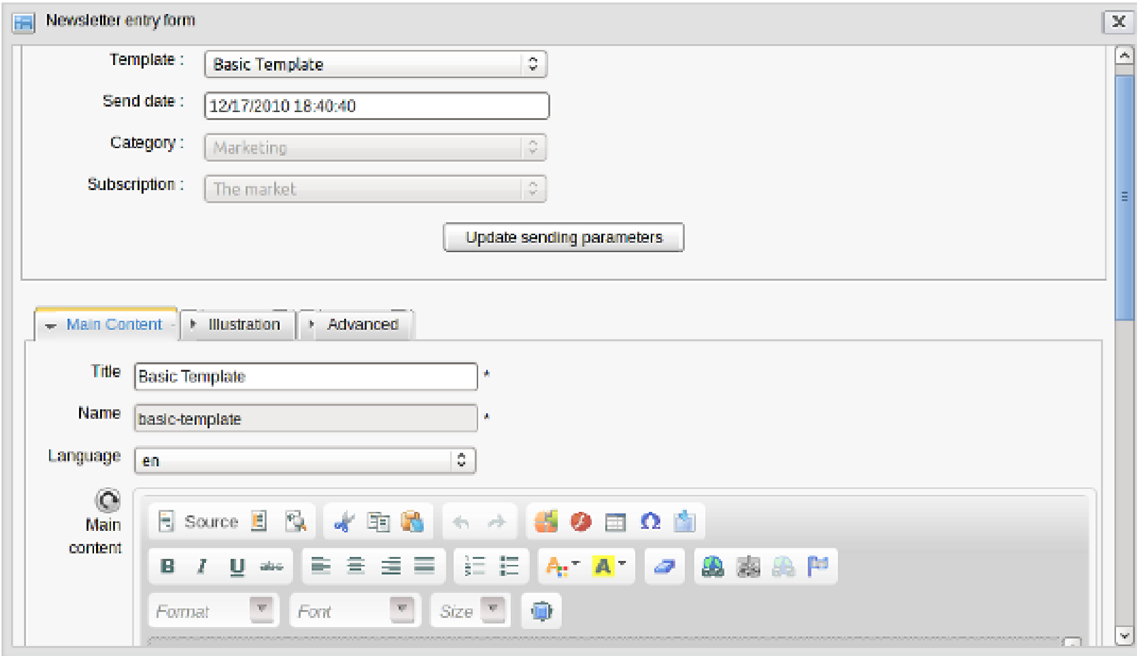
Each subscription consists of many newsletters. eXo Content helps you easily create newsletters by following these steps.

Procedure 4.108. Creating Newsletters

1. Go to **Group** → **Newsletters** on the administration bar. The **Newsletter** portlet appears.

2. Click the 

button on the action bar. The **Newsletter entry form** appears:



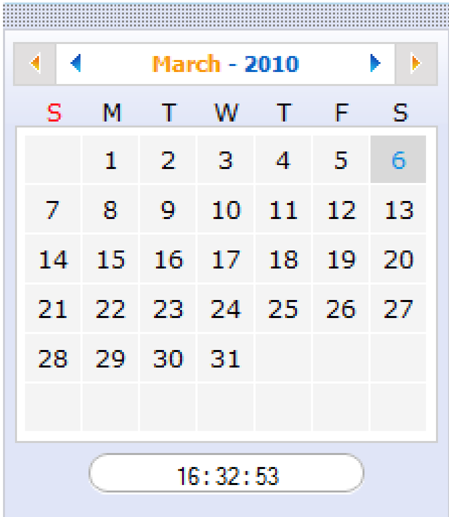
Details:

Table 4.33.

Field	Details
Template	The template for your newsletter form. **Basic Template** is set by default.
Send date	The date and time to send the 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 the  icon 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 the  icon in the category field to select the category and the subscription in list.

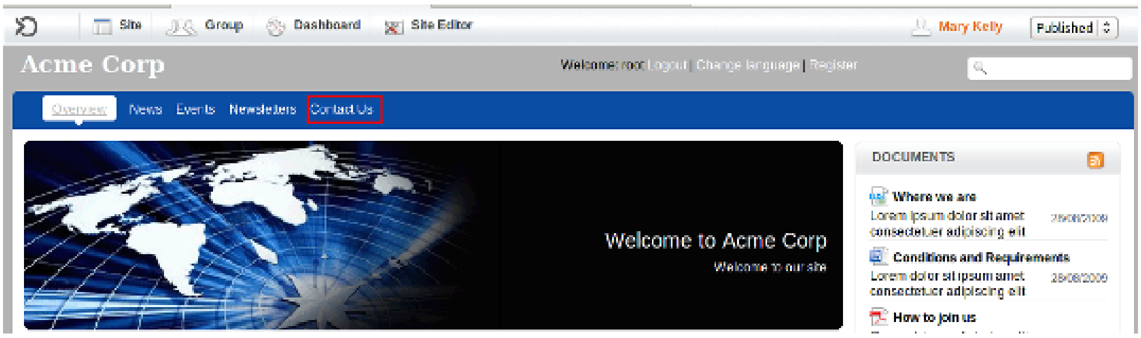
6. Click the **Update sending parameters** button to update information about this newsletter. A message pops up and informs you that you have updated information successfully.

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

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

9. Click **Save** to save this newsletter as a 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 appears:

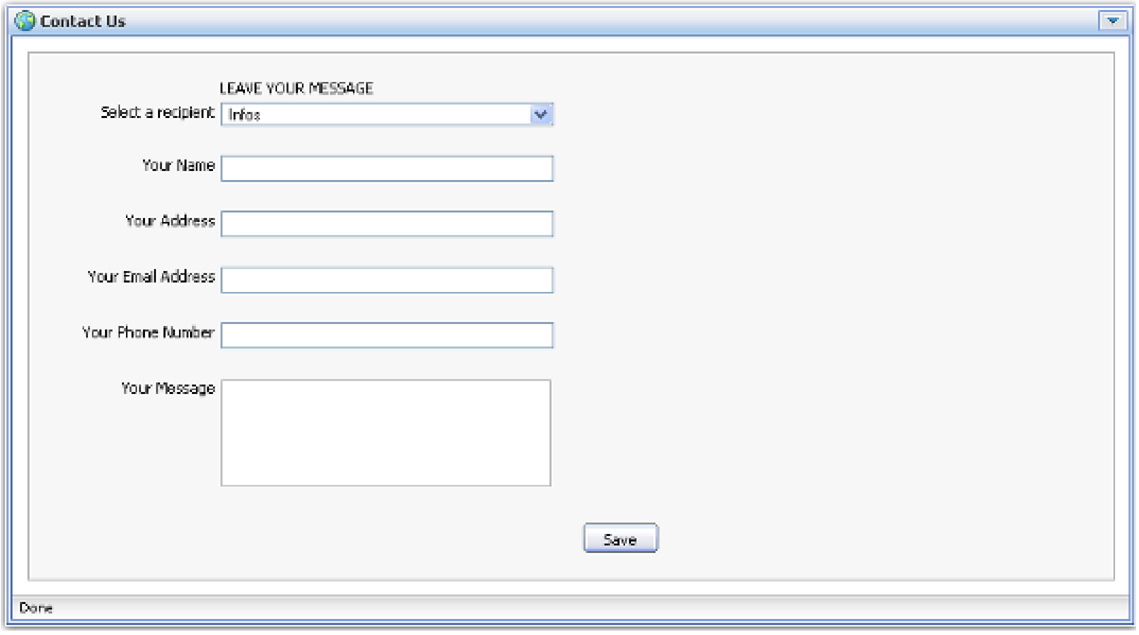


Table 4.34.

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.

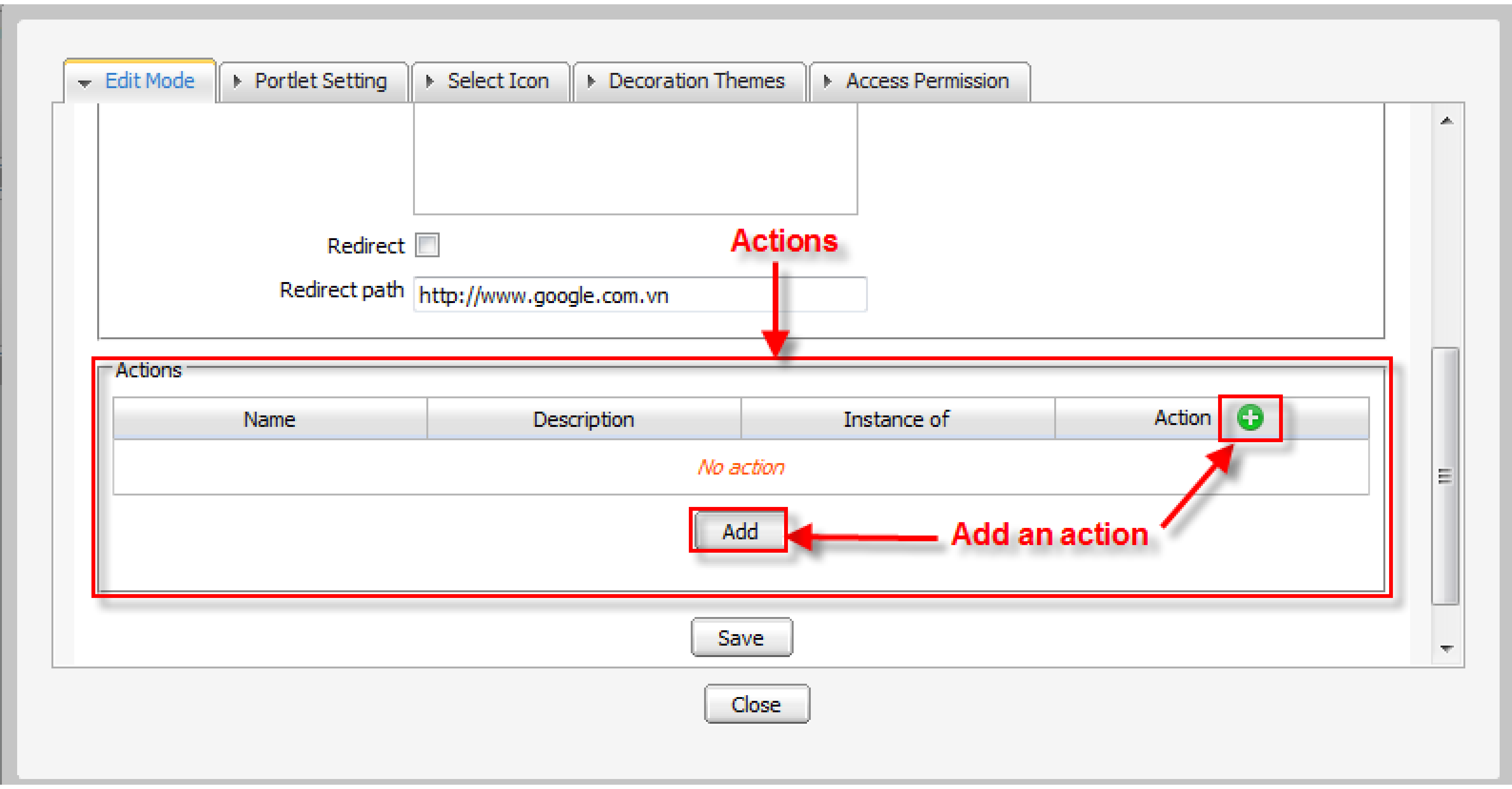
12. Click **Save** to save a message.

4.13. Fast Content Creator

The *Fast Content Creator* portlet in eXo Content allows you to quickly create and save a new document with only one template in a specific location without having to access *Content Explorer*. This can dramatically expedite the creation of a single new document.

There are two modes in Fast Content Creator: *Basic Content Creator* and *Standard Content Creator*.

The Standard Content Creator mode adds an **Actions** section to the **Edit Mode** tab (see the details at *Section 4.13.1, “Configuration”*) which allows you to add an action to your document when configuring it.



To add an action to a document, click **Add** or the

icon to open the **Add action form**. Follow the procedure in *Section 4.7.4.10.1, “Add an action”*.

4.13.1. Configuration

In eXo Content, the Fast Content Creator is applied in the **Contact Us** portlet with the *Basic Content Creator* mode by default. You can configure the *Fast Content Creator* by editing the **Contact Us** portlet.

To configure the Fast Content Creator, do the following:

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

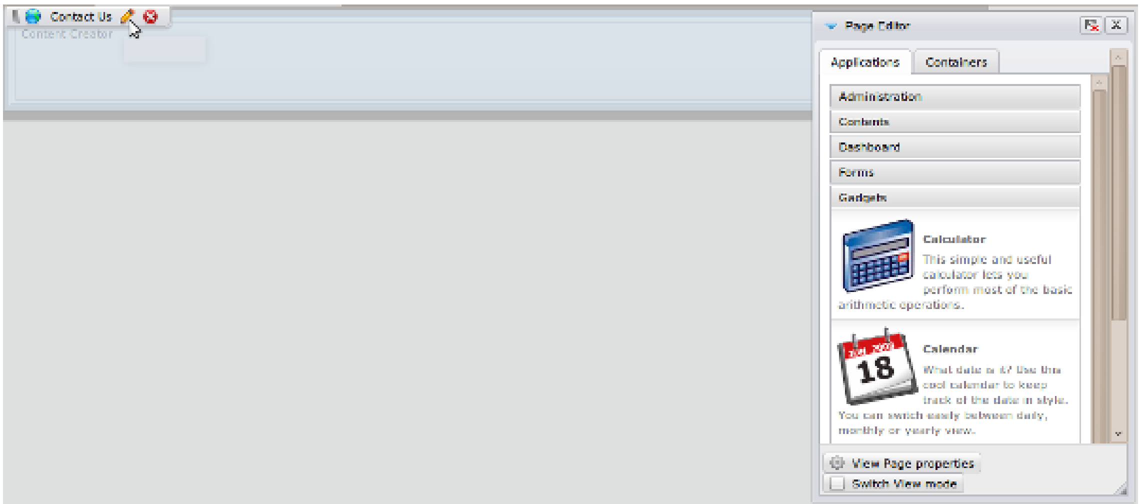
2. Click **Site Editor** → **Edit Page** on the administration bar. The **Page Editor** will be displayed.

3. Hover the mouse pointer over the **Contact Us** portlet and the toolbar appears.

   Click the

   icon to edit the portlet.



The form with the *Edit Mode* tab appears:

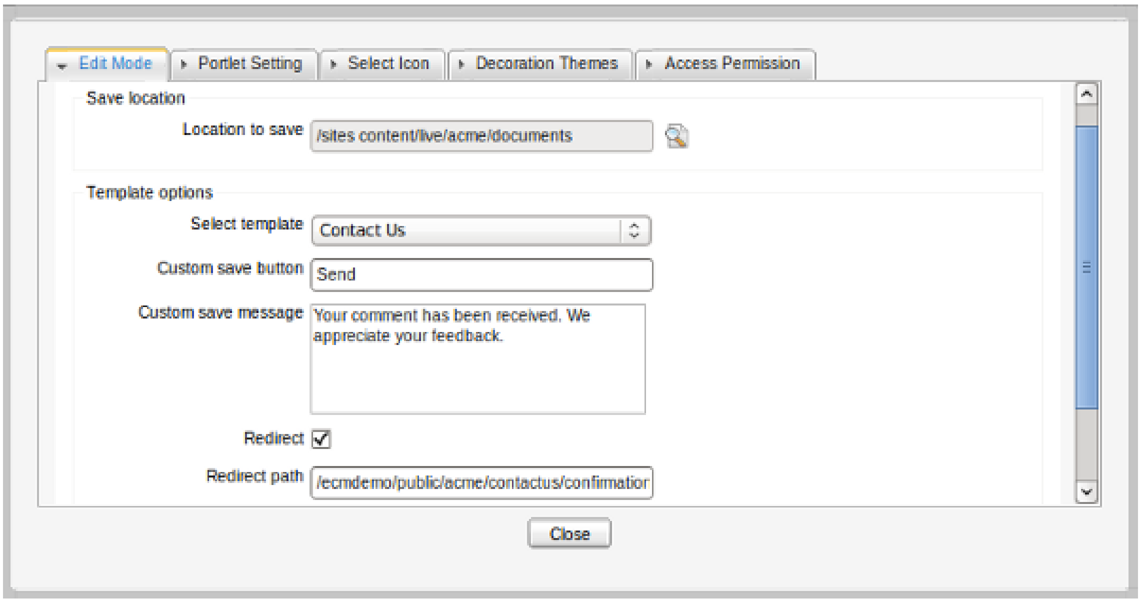


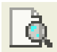
Table 4.35.

Field	Details
Location to save	Select the location to save documents or messages.
Select template	Select a document template. There are different input fields corresponding 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.

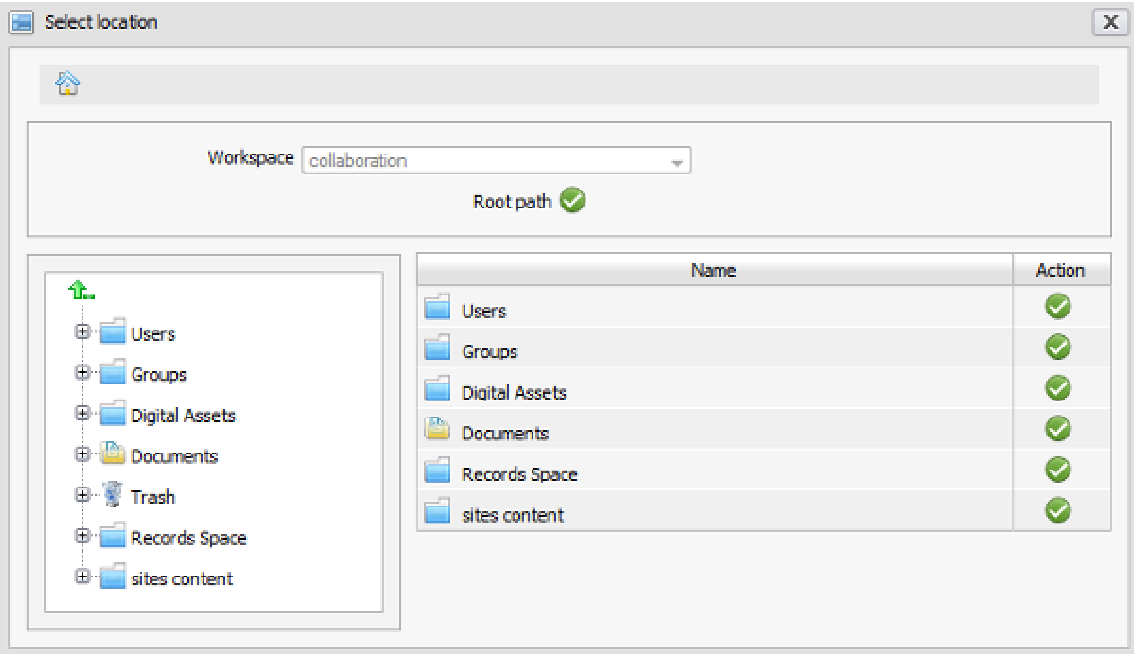
Field	Details
Redirect	Allow you to redirect the path in the Redirect path field.
Redirect path	Show a path to which you will be directed after clicking **OK** in the confirmation message.

4. Select the location to save:

   a. Click the

   icon to select a specific location to save documents. The **Select Location** form appears:



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

   icon in the **Action** column to choose the child node on the right panel. After being selected, this location will be displayed on the **Location to save** field. Created documents will be saved in this location.

5. Select a template which is used to create a new document.

6. Change the label for the **Custom save** button, and the content for the **Custom save message**.

7. Tick the **Redirect** checkbox if you want to redirect to the path in the **Redirect path** field after clicking **OK** in the save message.

8. Click **Save** to finish the configuration of the *Fast Content Creator* portlet.

9. Click **OK** in the confirmation message.

10. Click **Close** to quit the form.

4.13.2. Create a new document

To create a new document with the Fast Content Creator, do the following:

Procedure 4.109. Create a new document

1. Go to **Site** → **Acme** → **Contact Us**.

2. Enter values into all the fields in the **Contact Us** portlet.

3. Click **Save** to accept creating the new document. A message appears to let you know that the document is created successfully at the location that you established in the **location to save** field.

4.13.3. View a new document

After creating a new document, you can view it by do the following:

Procedure 4.110. View a new document

1. Go to **Content Explorer**.

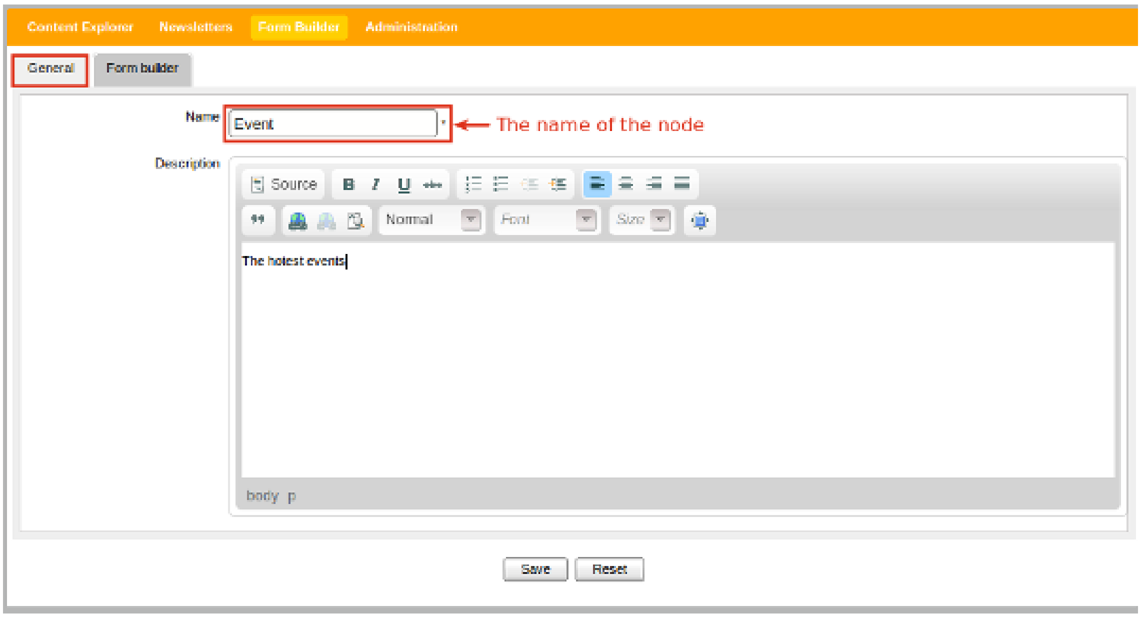
2. Select the drive and the path that you established in the configuration of Fast Content Creator to view the new document.

4.14. Form Builder

The *Form Builder* portlet enables users to create and to edit various document type templates. Documents are stored in a node; therefore, the term *node* and node types are often applied.

Procedure 4.111.

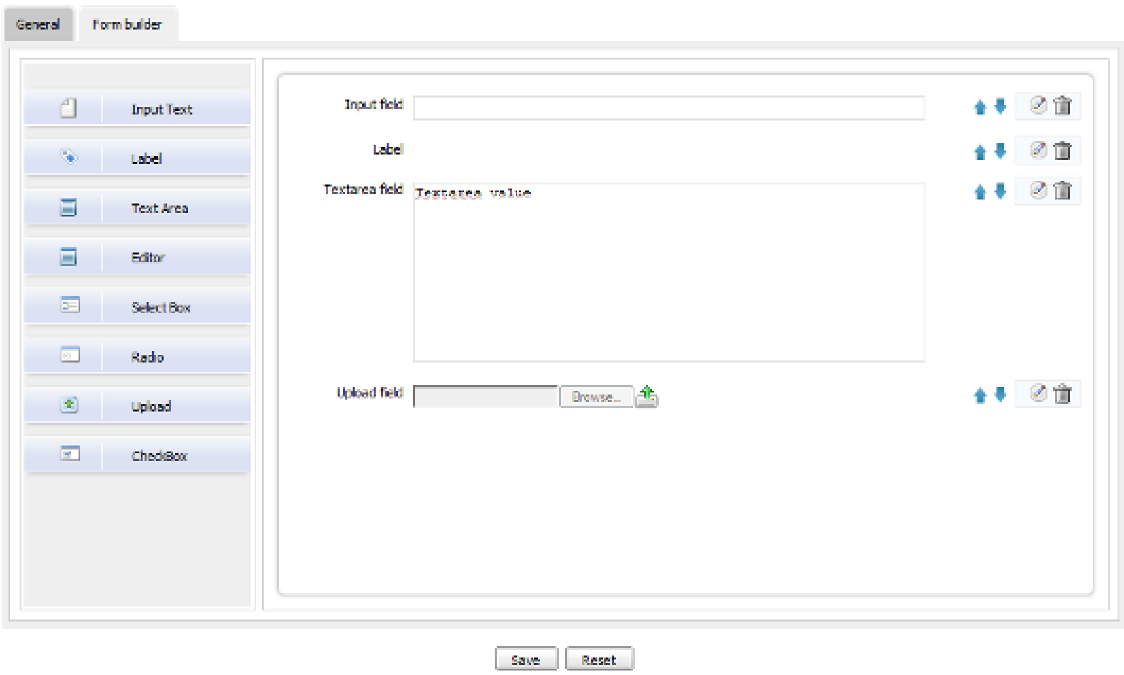
1. Go to **Group** → **Form Builder** on the administration bar. The *Form Builder* will appear:



2. Enter the node name into the **Name** field (an asterix [*] indicates that this a required value).

3. Enter a brief description of the node.

4. Click the **Form Builder** tab. Items on this tab allow 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 icon that corresponds to the component to edit properties of that component. The form to edit properties appears like the illustration below:

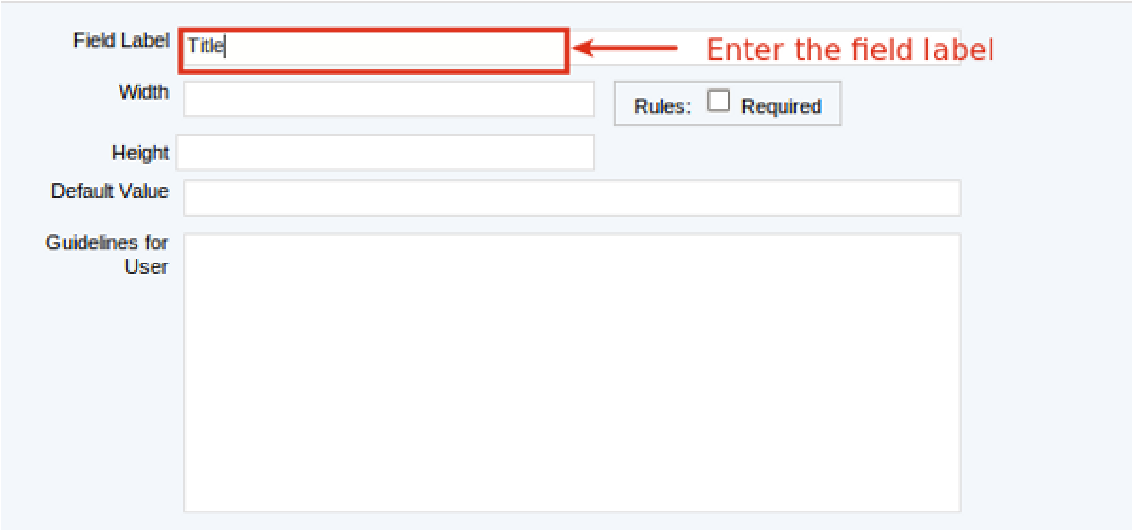


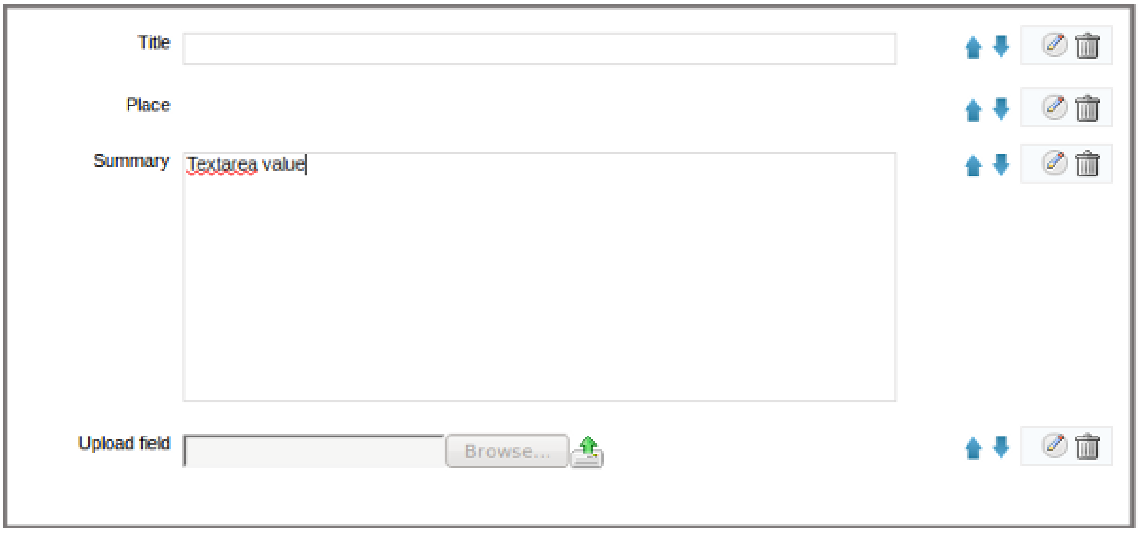
Table 4.36.

Field	Details
Field Label	To enter the field label.
Width	To enter the field width. If the Rules: Required checkbox is marked, the * will appear beside the text box, indicating that values in this box are required.
Height	To 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 the icon again to hide the form to edit the properties.

After editing the properties of the components, the components will appear similar to the illustration below:



8. Click **Save** to create the new node, or **Reset** to edit the node again before saving.

   A message will inform that you created a node successfully.

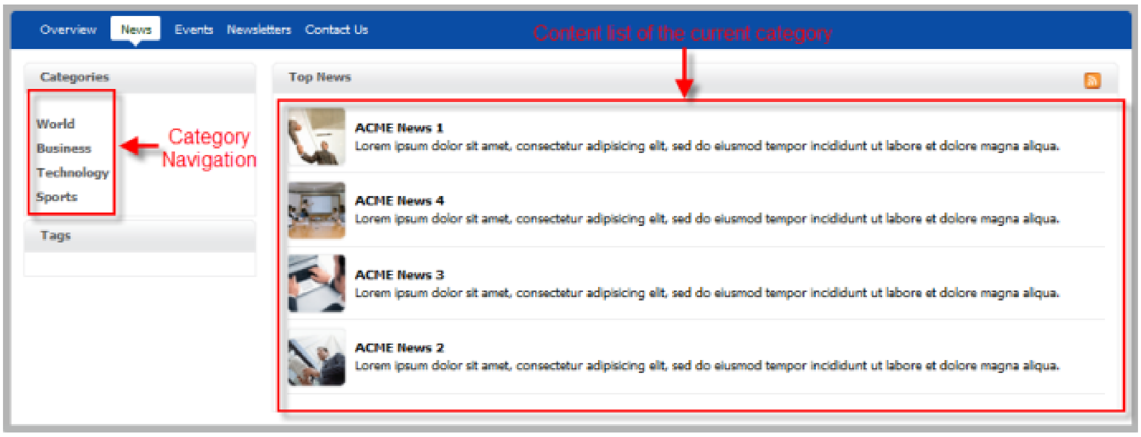
4.15. Category Navigation

The *Category Navigation Portlet* and *Parameterized Content List Viewer* portlets avoid the need for long URLs when viewing a content and enable users to see published documents or web contents in specific categories in one page.

Using symbolic links, the database can retrieve the content no matter where the object physically resides. The relations between shortcuts can also be managed in this way.

Procedure 4.112. Access to Category Navigation Portlet

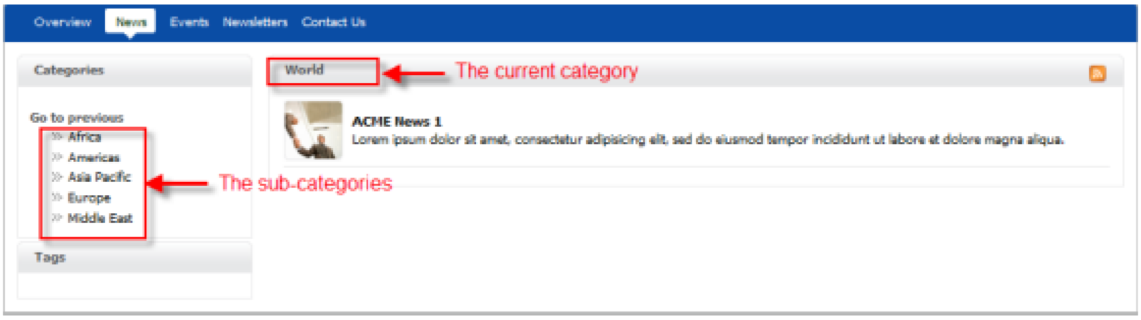
1. Go to **News** on the navigation bar:



   The left pane lists all the categories containing contents.

The right pane displays all the documents belonging to the current category.

2. Click a category that you want to view its contents. Its sub-categories are listed on the left pane and its contents are shown on the right pane.

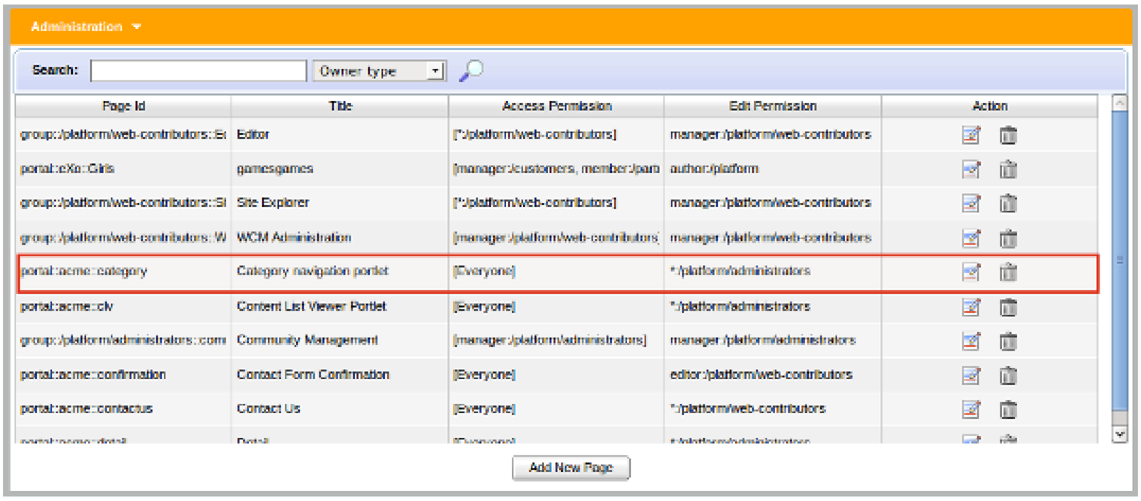


3. Click **Go to previous** to return to the parent category.

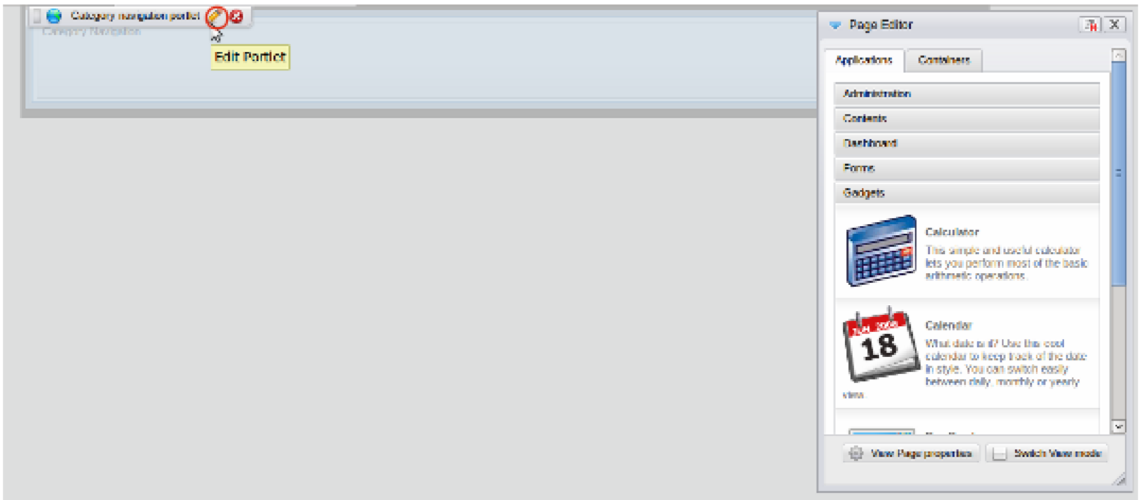
The Edit Mode of the Category Navigation Portlet. Administrators can edit the Category Navigation portlet with the following procedure:

Procedure 4.113.

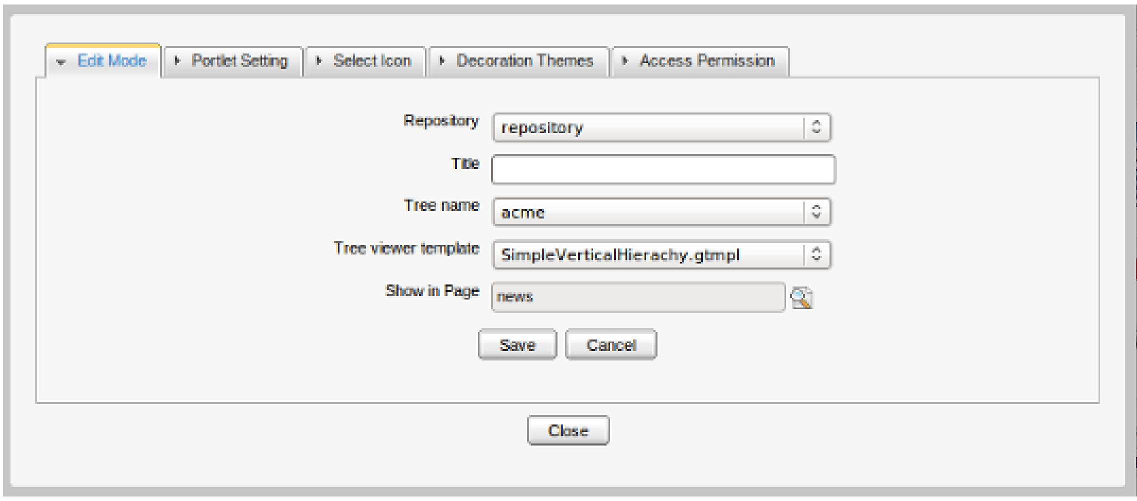
1. Go to **Group** → **Administration** → **Manage Pages** on the administration bar. The **Manage Pages** list will appear:



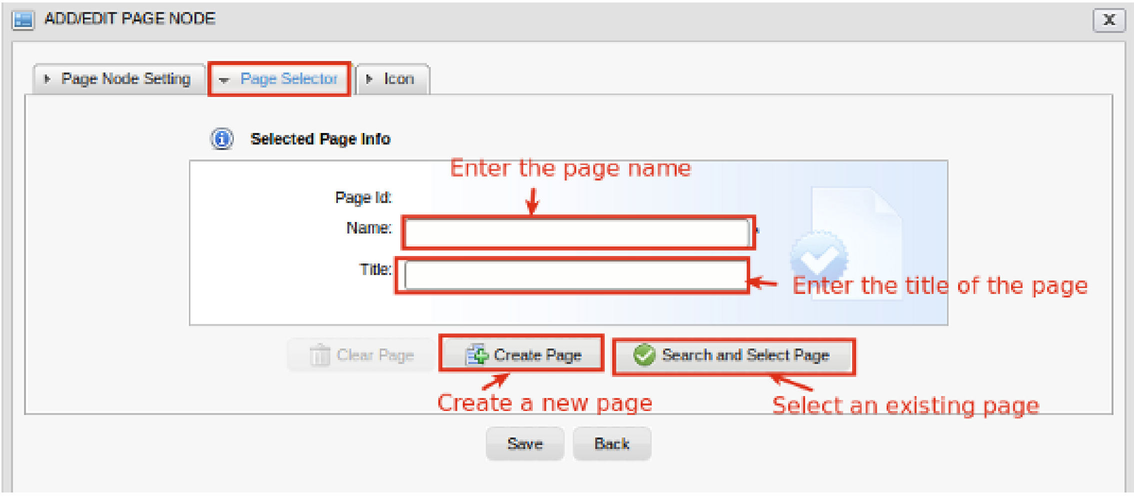
2. Click the  icon in the *Category navigation portlet* entry to open the page to edit this portlet.



3. Click the  icon to open a form to edit the portlet settings.



4. Click the  to select the repository for documents in the Repository field.
5. Enter 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:



9. Click the icon 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 of the **Edit Mode** tab.

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

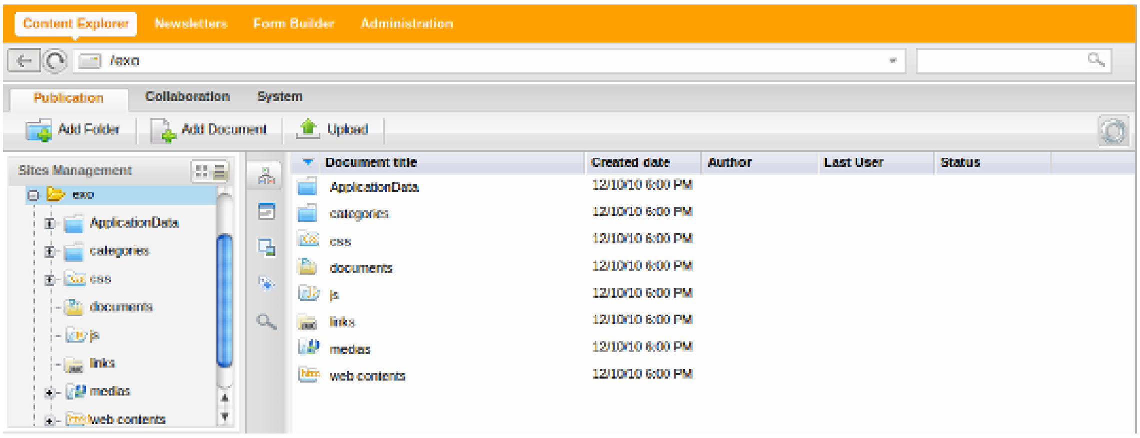
Advanced Actions

5.1. Manage Site Resources in one place

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

Chose 

in a **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:

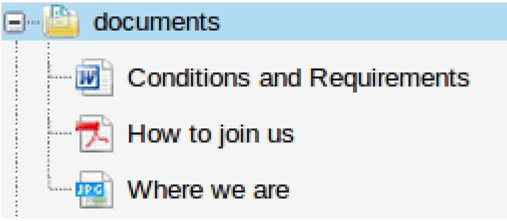
5.1.1. CSS Folder

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

> **CSS**
>
> Once a new CSS file is created in a site, it will affect how the site is displayed. For example, if your new CSS file is created with a red background color, the site background will then turn to red.

5.1.2. Document Folder

This folder contains all documents used in a site. When you want to add a new document for a site, you can also put them in another folder, but it is recommended to use this one to manage everything easily and conveniently.



5.1.3. JS Folder

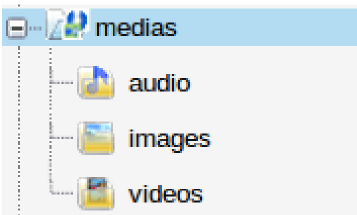
This is one of the default files of a site. This file contains Java Script data that is used to make a site more animated and more dynamic.

5.1.4. Links Folder

This file contains all links used in a site.

5.1.5. Media Folder

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



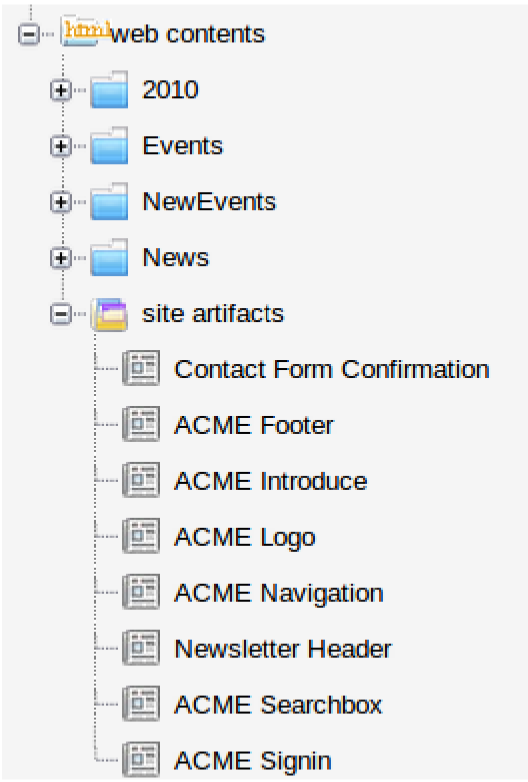
audio:
: This folder contains sound data used in a site.

images:
: This folder contains images used in a site.

videos:
: This folder contains videos used in a site.

5.1.6. Web Content Folders

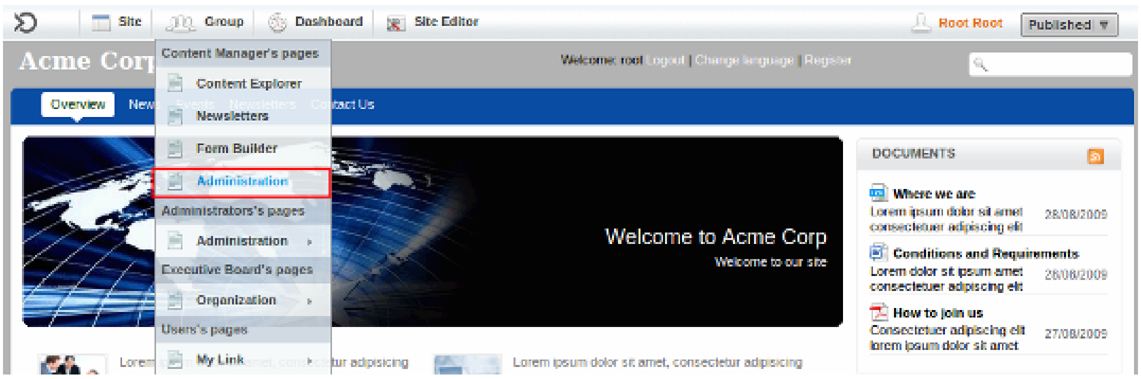
This folder contains all web content used in sites. It is recommended to put all the web contents files here to manage them more easily, or for easy reuse in another site.



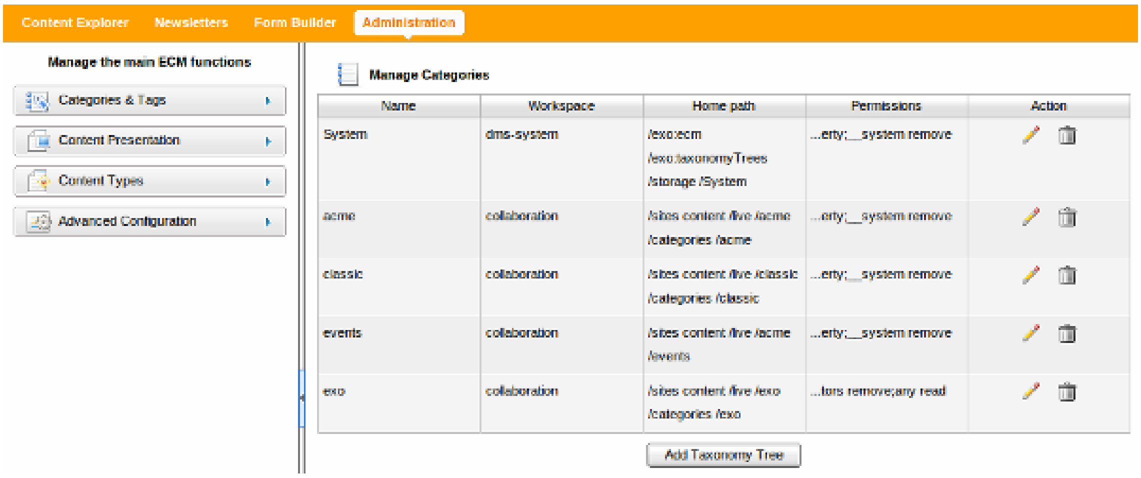
5.2. Administration Page

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 gives you to access to the following sub-pages:

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

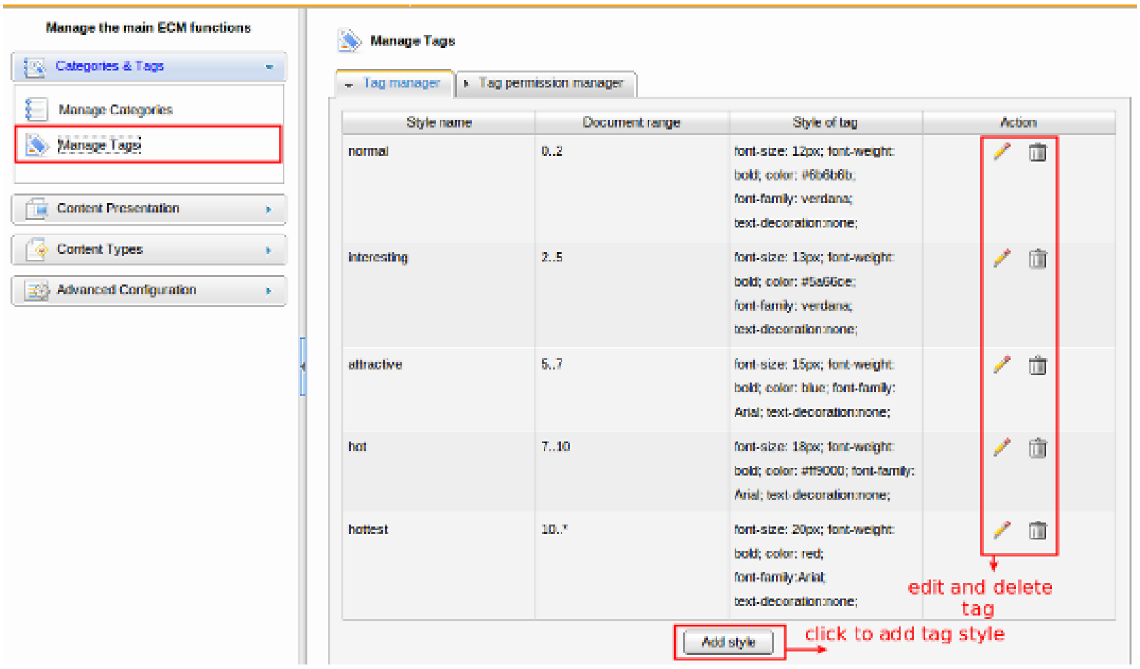
5.2.1. Categories and Tags

5.2.1.1. Manage Tags

The *Manage Tags* form allows you to manage tag styles (the appearance of tags in visual representations). A tag's style changes depending on the number of documents with that tag.

Go to **Group** → **Administration** then click on **Categories and Tags** → **Manage Tags**.

From this page you can add new tags styles or edit existing styles.



5.2.1.1.1. Add a tag style

To add a new tag style, do the following:

Procedure 5.1. Add a Tag Style

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

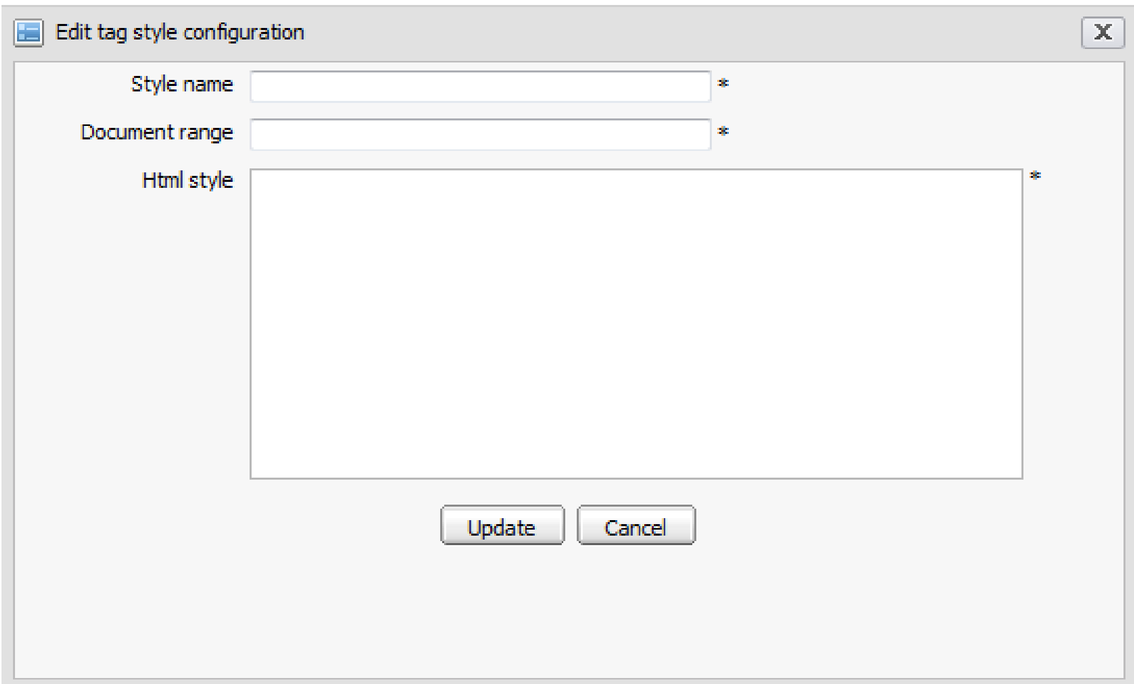


Table 5.1.

Field	Details
Style name	Give the tag name. You cannot edit it.
Document Range	Give the number of documents that must have this tag for this style to apply. The asterix (*) indicates this is a required value.
HTML style	Include settings for the font-size, font-weight, color, font-family and text-decoration. The asterix (*) indicates this is a required value.

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.

> **Note**
>
> - The format of valid range must be: *a*..*b* where *a*, *b* are positive integers. You can use * instead of*b* to indicate it is unlimited.
>
>   For example; *0..2* means that 0, one or two documents must be assigned to a tag for this style to apply while *10..** means at least ten documents (with no upper limit) must be assigned for the style to take effect.
>
> - The **HTML style** text box cannot be empty: you can change values of font-size, font–weight, color, font-family, text-decoration.

5.2.1.1.2. Edit

To edit the existing tags do the following:

Procedure 5.2. Editing existing tabs

1. Click the pencil icon corresponding to the tag name which you want to edit in the **Action** column. The **Edit tag style configuration** form appears like the form to add a tag style.

2. Change values in the fields **Document range** and **HTML style**. Do not change the **Style name** field, as you are editing an *existing* tag.

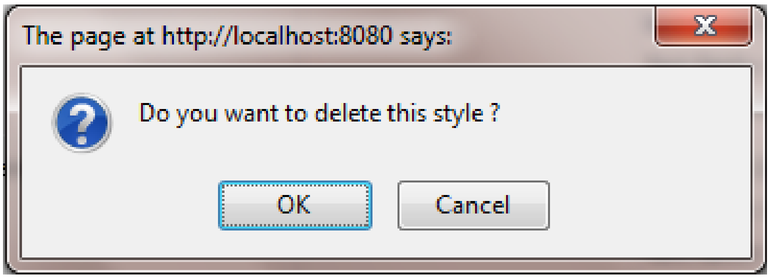
3. Click **Update** to save any changes.

5.2.1.1.3. Delete a tag style

To delete a tag style:

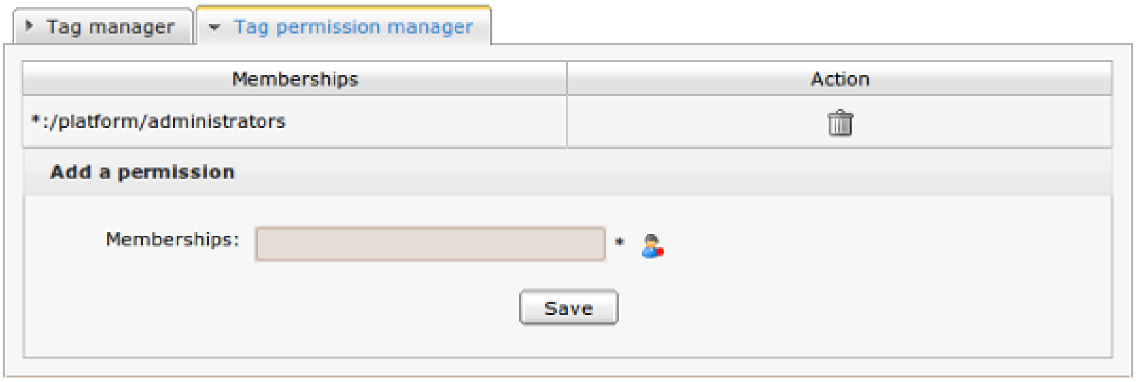
Procedure 5.3.

1. Click the corresponding trash icon,
2. Click **OK** in the confirmation message to confirm the deletion.



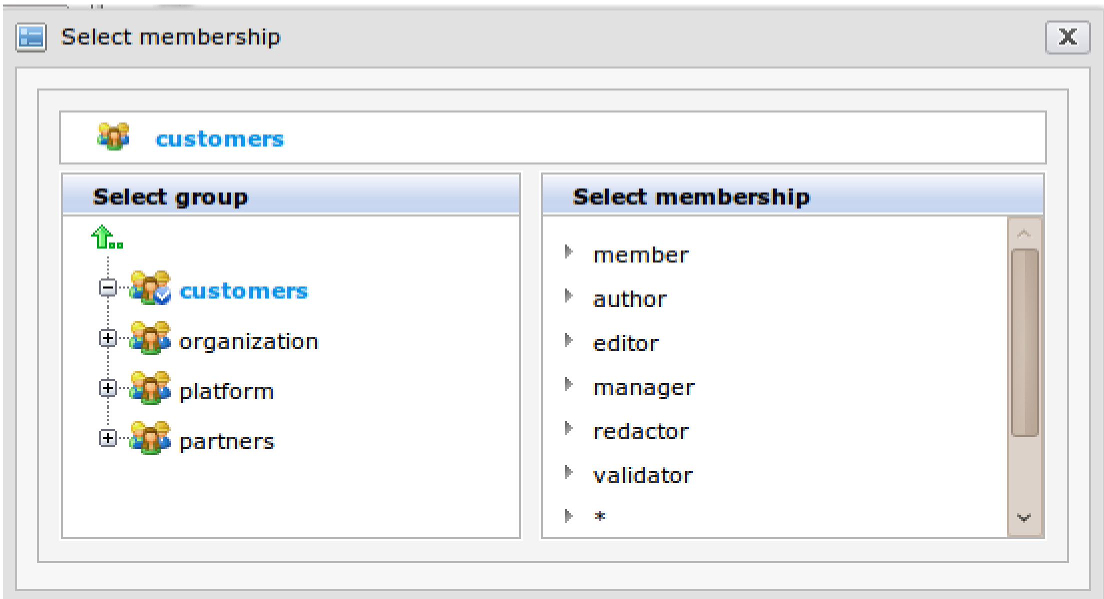
5.2.1.1.4. Tag Permission Manager

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

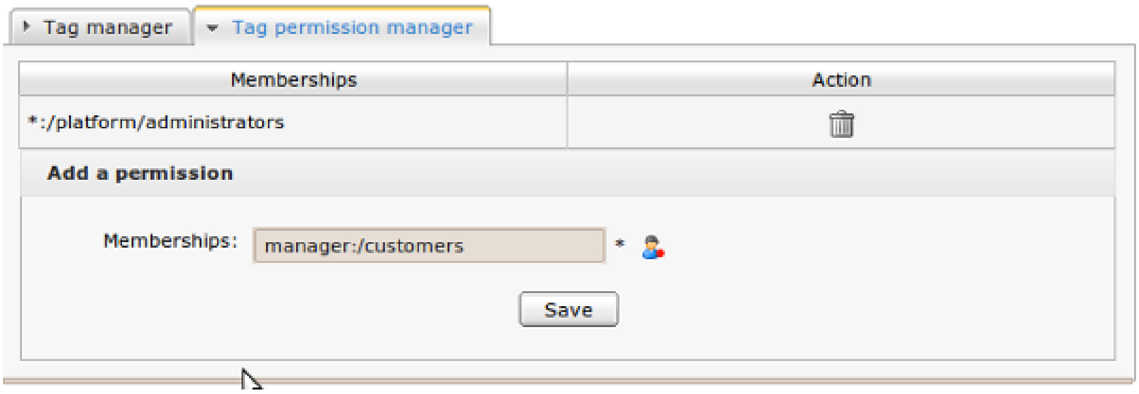


Procedure 5.4. Set Permission To Tag Management

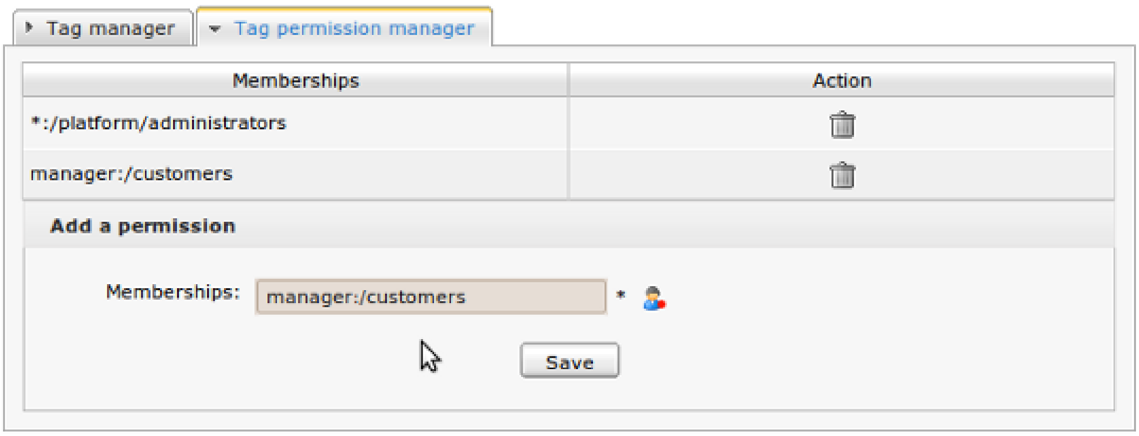
1. Click the  icon beside the **Memberships** field to select memberships in order to add a permission for those memberships. The Select membership form will appear:



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



3. Click **Save** to add a permission for the membership to the **Memberships** column.

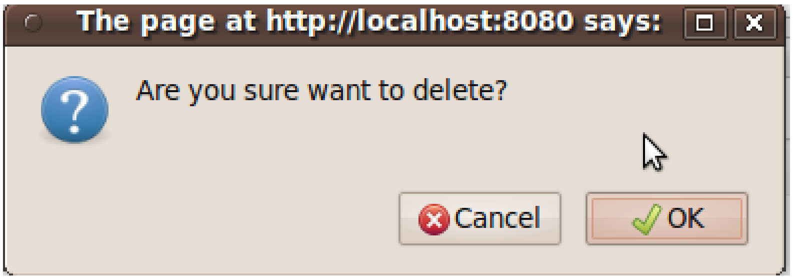


To delete memberships permissions:

Procedure 5.5.

1. Click the trash icon corresponding to that membership.

2. Click **OK** in the confirmation message.



5.2.1.2. Manage Categories

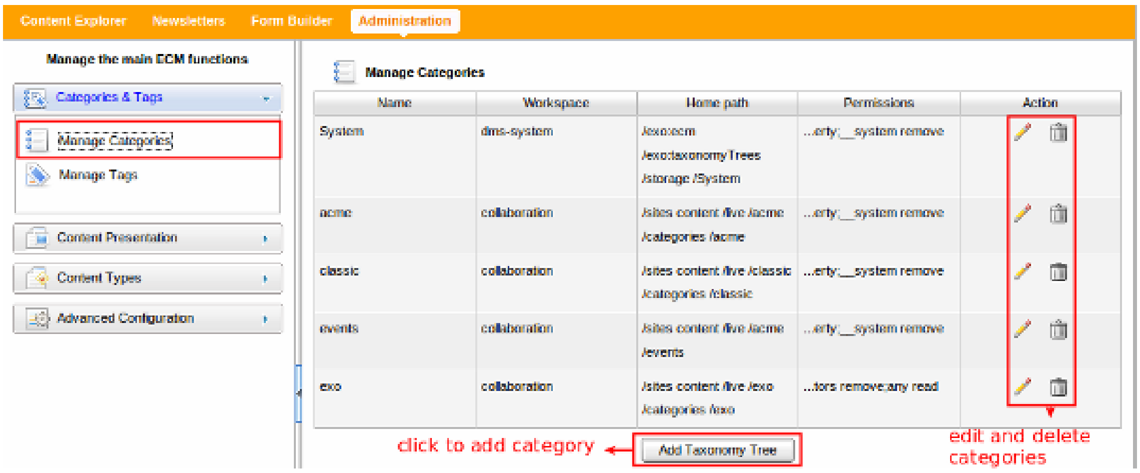
Category management can be understood as a classification practice. Categories are used to sort documents, so as to facilitate effective searches.

In this section, the concept of categorization and classification will be referred to with the term *taxonomy*.

The eXo Content category management system includes adding, editing and deleting a taxonomy tree.

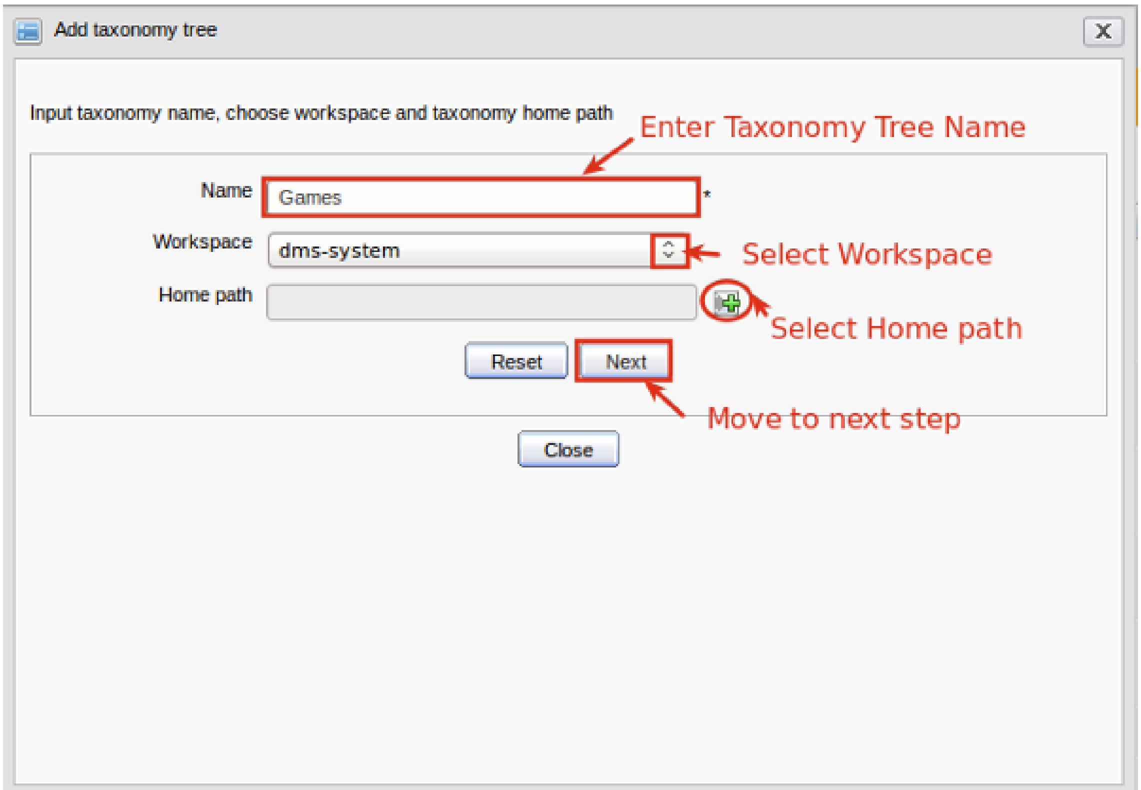
Go to **Group** → **Administration** then click on **Categories and Tags** → **Manage Categories**.

The **Manage Categories** form appears.



5.2.1.3. Add a Taxonomy Tree

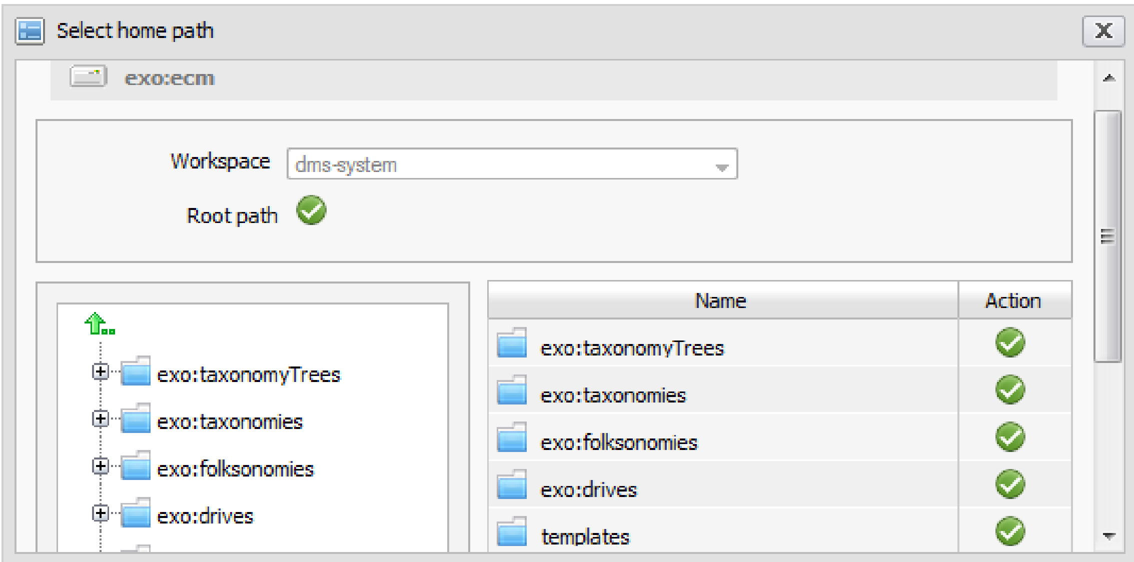
1. Click the **Add Taxonomy Tree** button to add a new taxonomy. The **Add taxonomy tree** form will appear.



2. Enter a name for the tree in the **Name** field. The asterix (*) denotes this as a required field.

3. Select the workspace you want to work with.

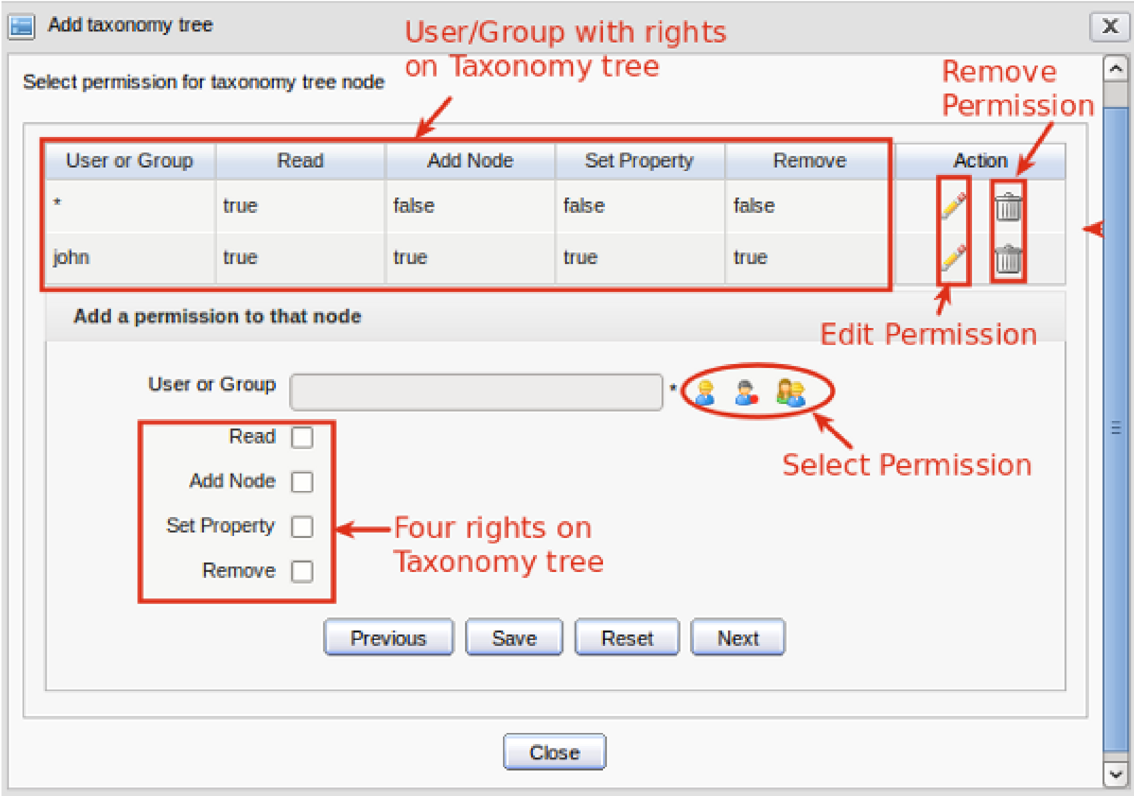
4. Select the home path by clicking the plus icon. The **Select Home Path** form will appear:



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

   Then, check at least one of the options below to set rights for the selected user to membership:

   Read Right
   : The option is to select the *Read* right or not.

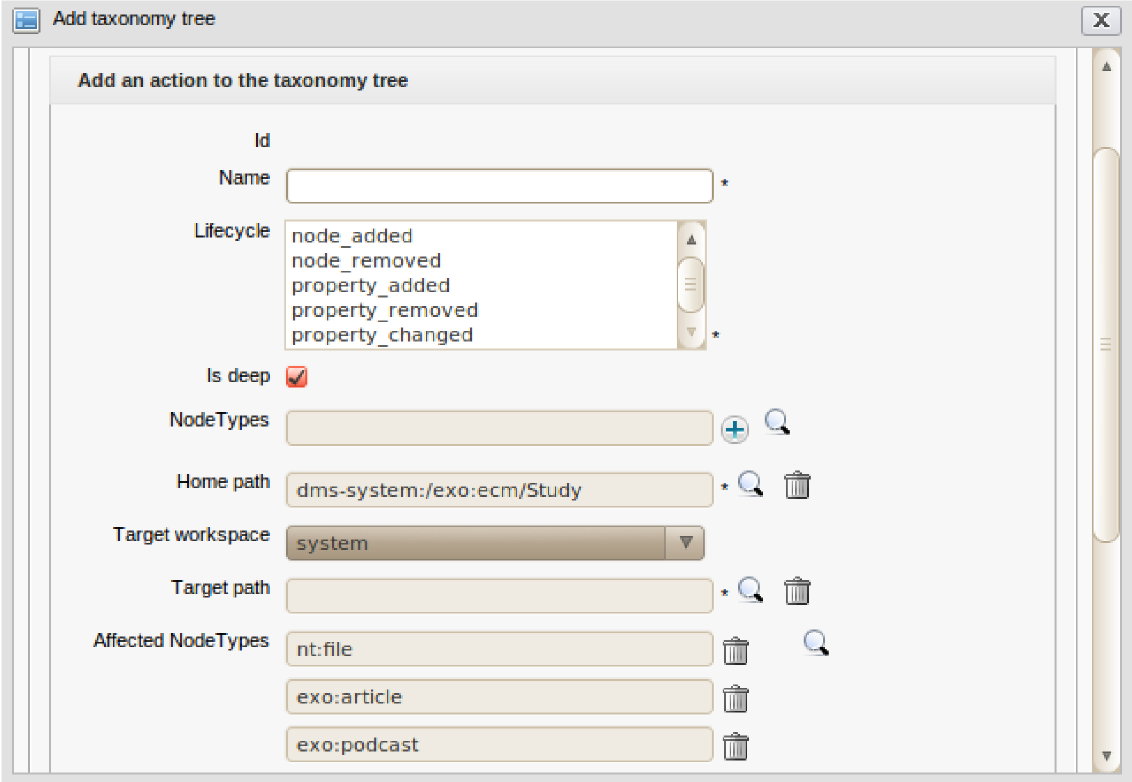
   Add Note Right
   : The option is to select the *Add Node* right or not.

   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.

9. After clicking **Save**, click **Next** to go to the next step.



10. Enter the name for an action of the taxonomy tree in the Name field. This is a required (*) value.

11. Select values for **Life-cycle**, **NodeTypes**, **Target workspace**, **Target path**, **Affected Node Types**. These fields are required (*).

12. Click **Save** to save all values and click **Next** to go to the next step.

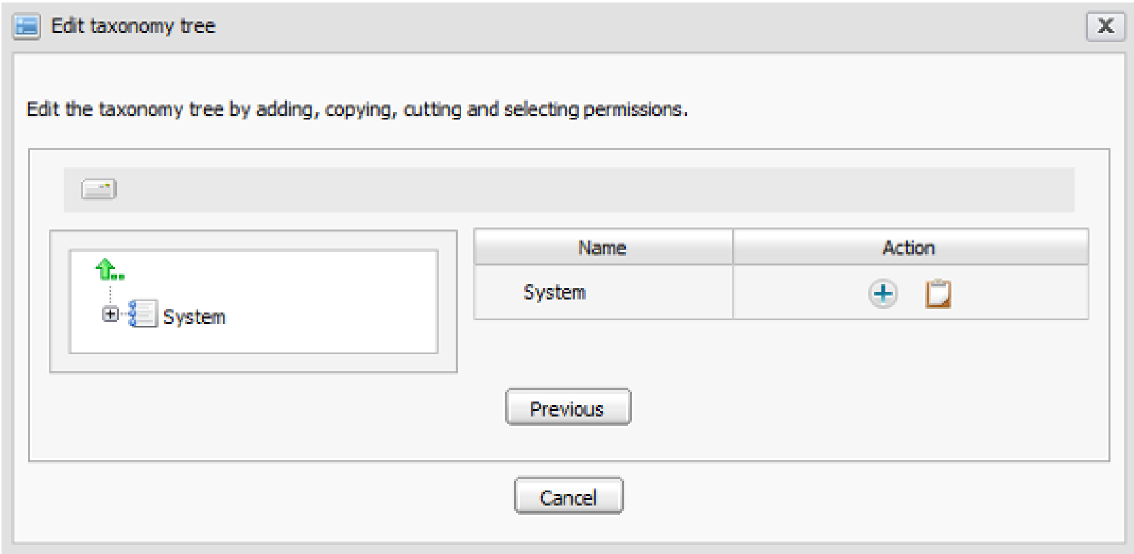
Considerations

- Do not use the following 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 fewer than thirty (30) characters.

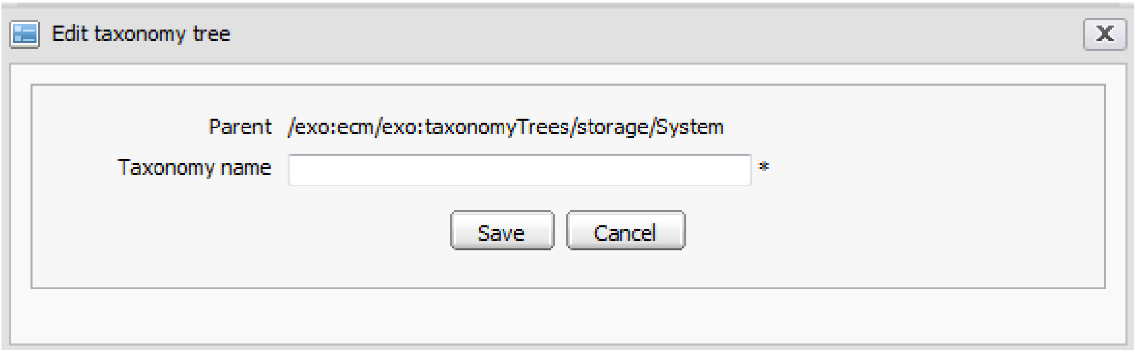
5.2.1.4. Edit a Taxonomy Tree

To edit a taxonomy tree:

1. Click the  icon that corresponds to the taxonomy tree you want to edit.



2. Click the  icon in the **Action** field to add more taxonomy trees. The Edit taxonomy tree will appear:



3. Enter a taxonomy name in the Taxonomy name field. This field is 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.

Considerations

- 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.

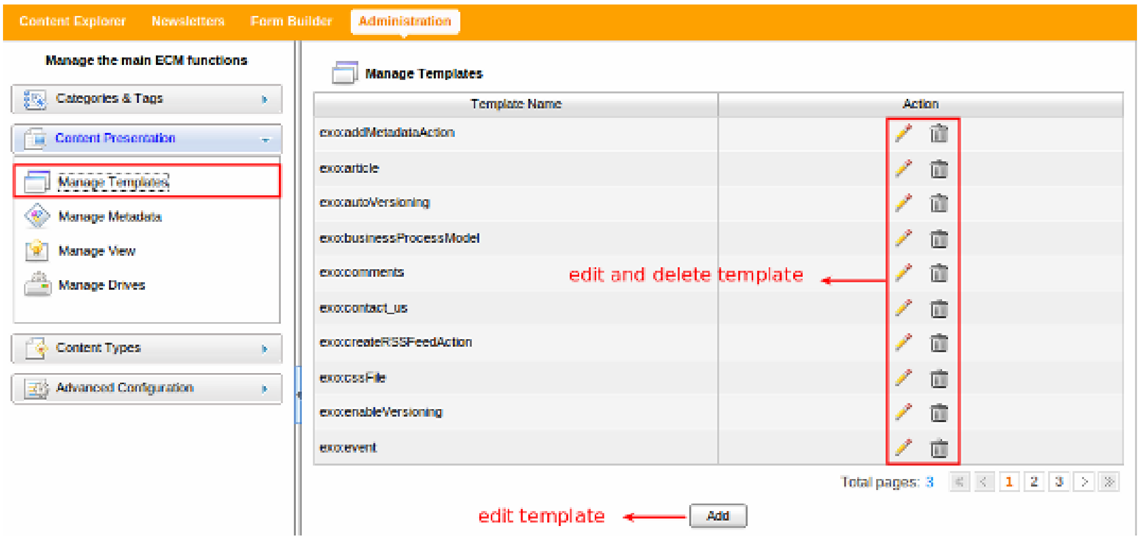
- You cannot delete taxonomies that have been referenced.

5.2.2. Content Presentation Manager

5.2.2.1. Manage a Template

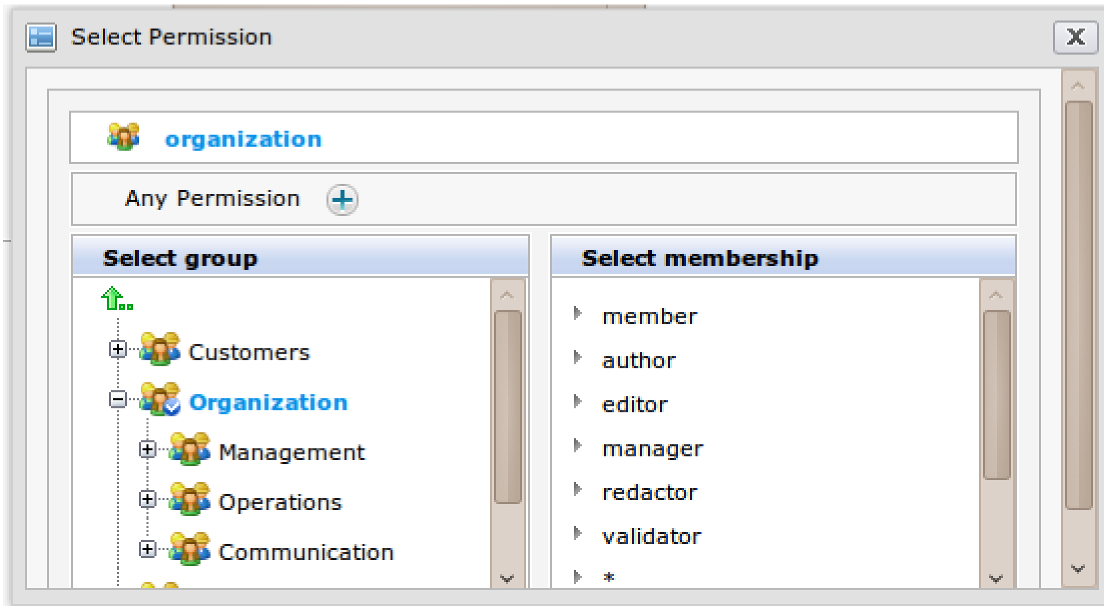
When creating a node in eXo Content, you must set its properties. Therefore, each node needs to have a form to enter data for their properties (called the `dialog template`), and display the existing values (called the `view template`).

The *Template Management* system allows users to view, delete or modify the predefined templates or to add a new template.

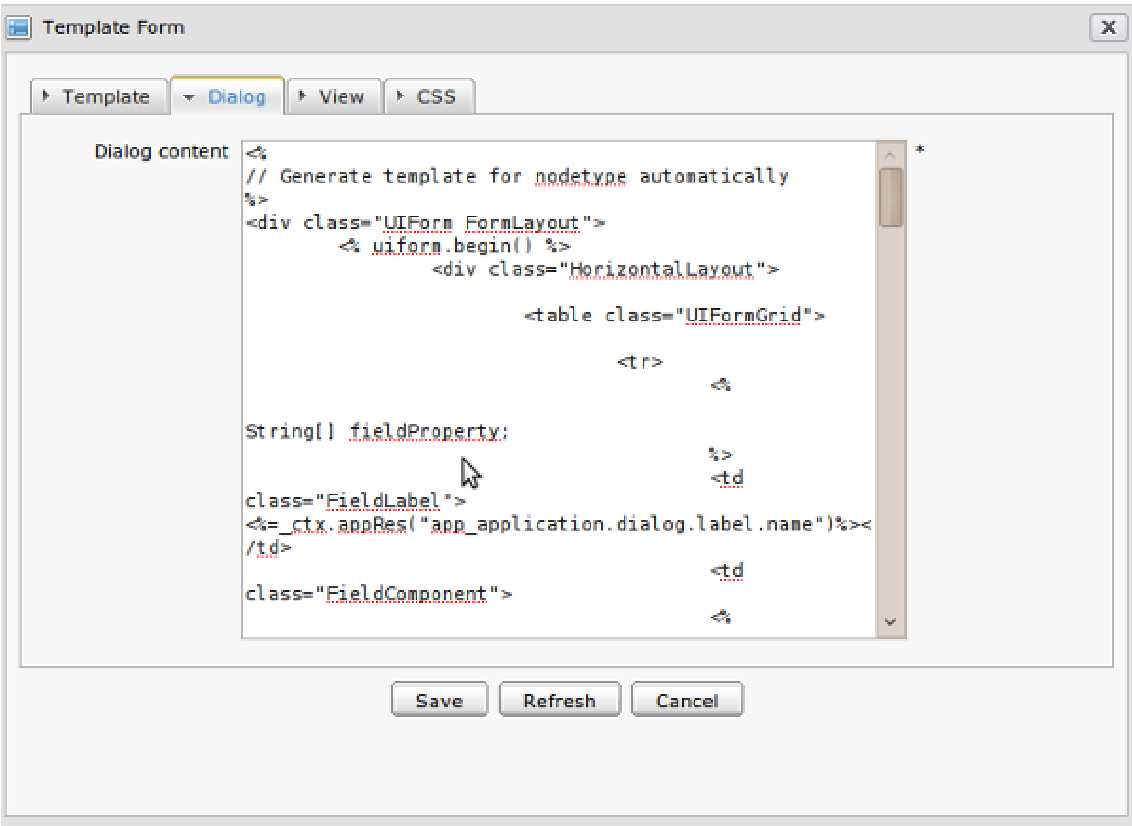


Procedure 5.6. Add a New Template

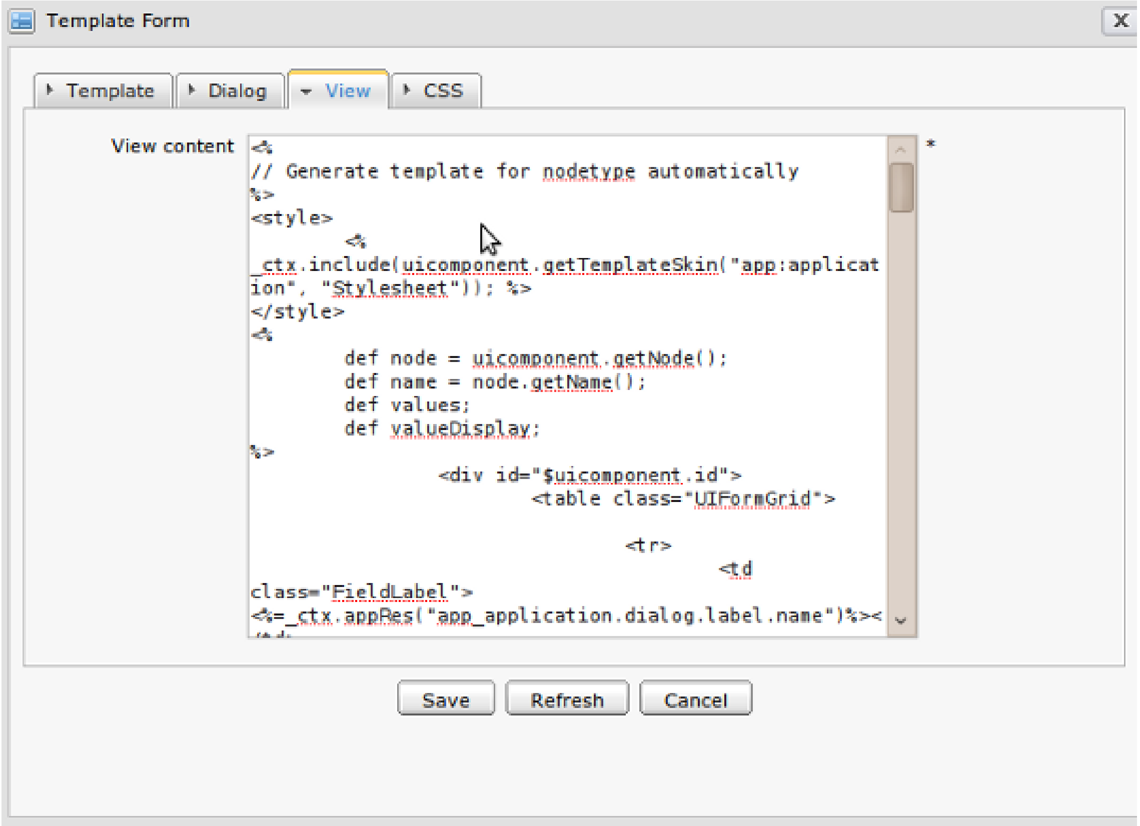
1. Go to **Group** → **Administration** then click **Content Presentation** → **Manage Templates**.
2. Click the **Add** button in the **Manage Templates** form to open the **Template** form.
3. Select the template type you require from the **Name** drop-down menu.
4. Specify a name for the template in the **Label** field.
5. Click the **Document Template** check box if the template you are creating should be used as a template for a document.
6. Click the icon next to the **Permissions** field to open the **Select Permission** dialog.
7. Select a group from the left panel and the membership from the right panel. Alternatively you can set permission for everyone by clicking the icon next to **Any Permission**



8. Select the **Dialog** tab and enter the value in the **Dialog content** field.



9. Select the **View** tab and enter the value in the **Dialog content** field.



10. Select the **CSS** tab and enter the value in the **Dialog content** field.

11. Click the **Save** button to create the template.

Procedure 5.7. Edit a Template

1. Go to **Group** → **Administration** then click on **Content Presentation** → **Manage Templates**.

2. Click the  icon in the Action column corresponding to the template you want to edit.

3. In the **Template** tab, you can edit the **Label** of the **Template**.

4. To add a dialog, do the following:

   a. Enter content for this dialog in the **Content** field.

   b. Enter a name for this dialog. This value is required (*).

   c. Select permissions for a group that can use this dialog. This value is required (*).

5. To edit an existing dialog, do the following:

a. Click the  icon in the dialog row you want to edit.

b. Edit the dialog properties.

c. Click **Save** to accept all changes in the Dialog tab.

6. To delete an existing dialog, do the following:

   a. Click the  icon in the dialog row you want to edit.

   b. Click OK to continue with deletion.

> **Note**
>
> You cannot delete the default dialog. You must create a new one before you can delete the current default dialog.

7. To add a view, do the following:

   a. Click the View tab and enter content into the content field.

   b. Enter a name for this view. This field is required (*).

   c. Select permissions for a group that can use this view. This field is required (*).

8. To edit an existing view, do the following:

   a. Click the  icon in the view row you want to edit.

   b. Edit the view properties.

   c. Click **Save** to accept all changes in the View tab.

> **Notes about Editing Views**
>
> You cannot change the view name.
>
> If you click **Enable Version** checkbox, this view automatically increments one version after you click **Save**. It is displayed at **version** column in the **View** tab.
>
> If the dialog has at least two versions, in the **View** tab, it displays the **Restore** button. You can use **Restore** to roll back to the previous View.

9. To delete an existing dialog, do the following:

   a. Click the icon in the dialog row you want to edit.

   b. Click **OK** to continue with deletion.

   c. Click **Save** to accept all changes.

Procedure 5.8. 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.

5.2.2.2. 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.

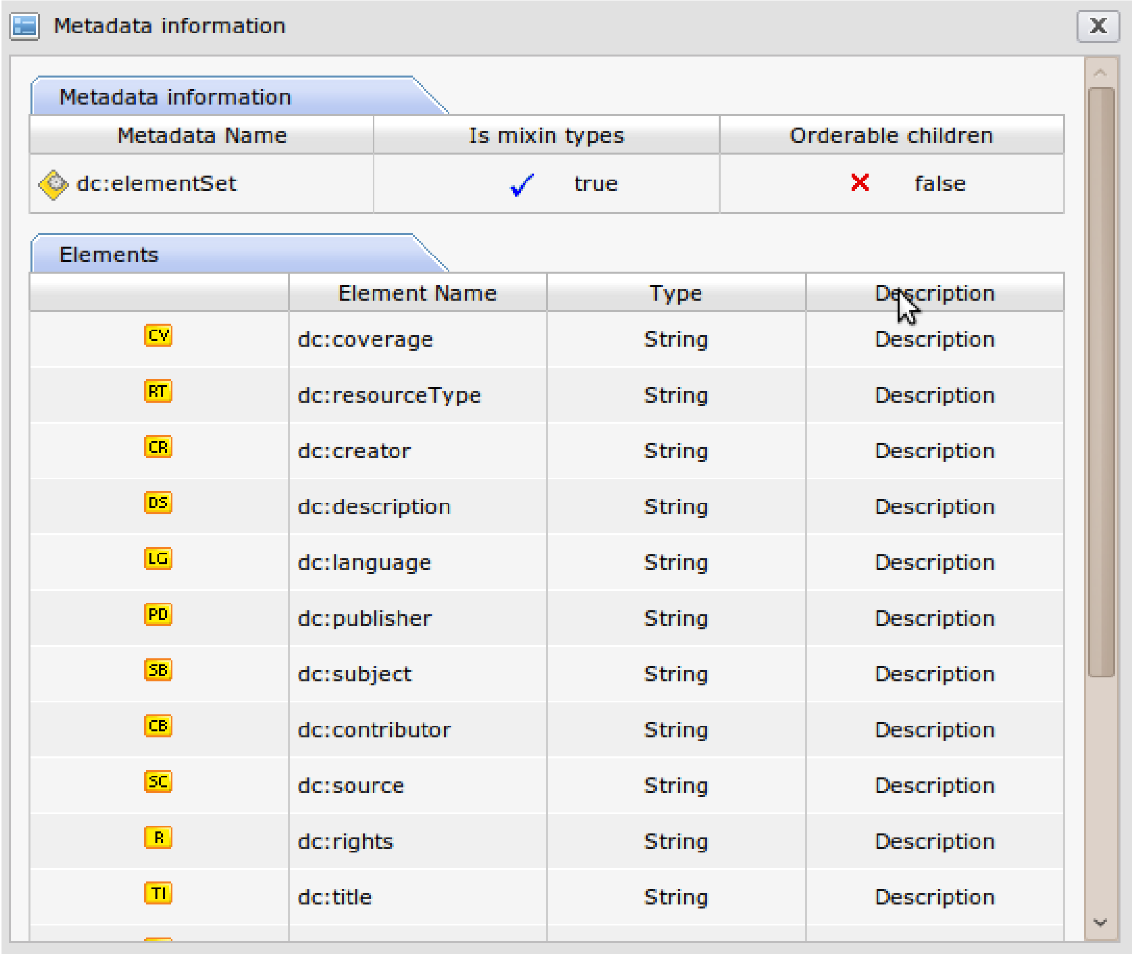
Metadata management allows managing nodes in the metadata format in the eXo Content system. The metadata may be considered as information used to describe the data. When data are provided to the end users, the metadata allow users to understand about information in more details. All metadata nodes can combine with other nodes to create a new node (add mix).

Procedure 5.9. View Metadata

1. Go to **Group** → **Administration** then click **Content Presentation** → **Manage Metadata**.

2. Click the icon corresponding to the metadata you want to view.

   The **Metadata Information** Form opens.



Procedure 5.10. Edit Metadata

1. Click the icon in the metadata row you want to edit.

   The **Edit Metadata's Template** form opens.

2. Change the required properties of the metadata.

   Metadata Name

   You cannot edit the metadata name.

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

Procedure 5.11. Delete Metadata

1. Click the icon corresponding to the metadata you want to delete.

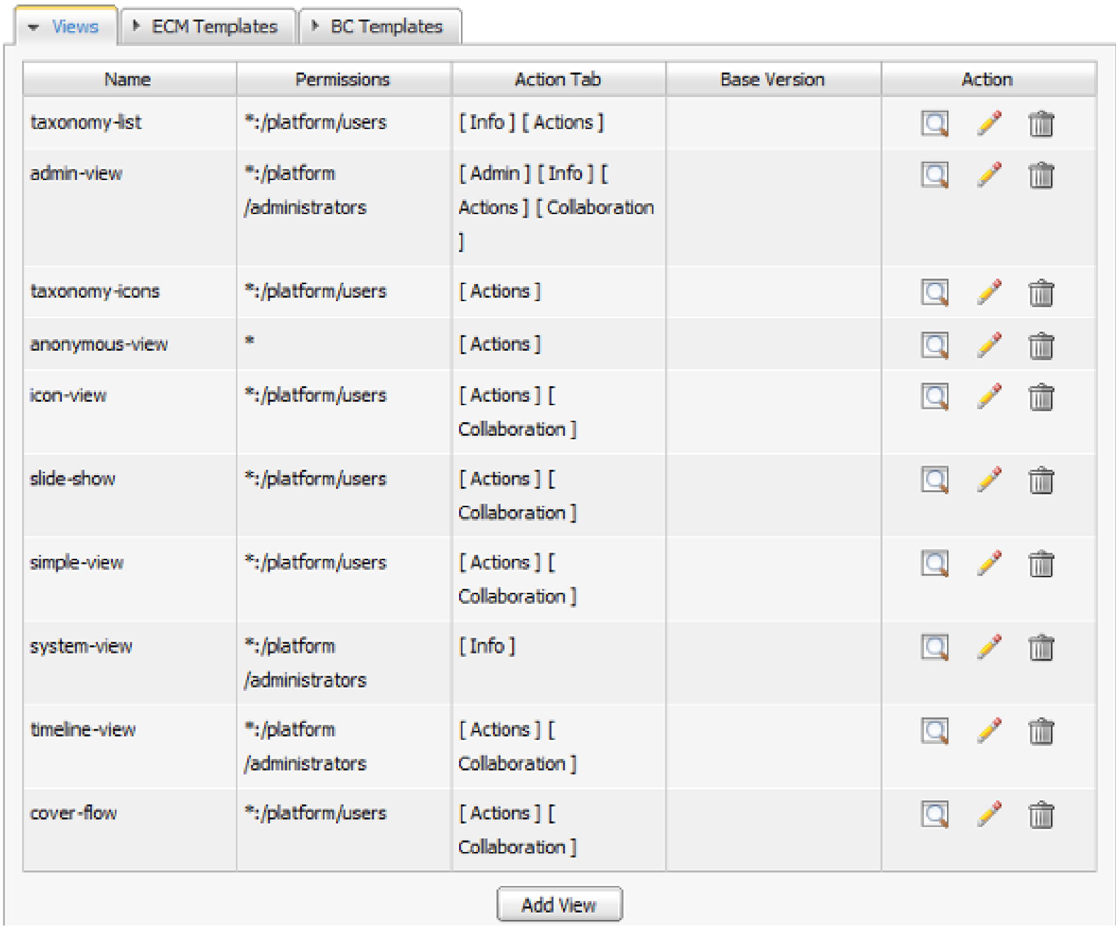
A confirmation message appears.

2. Click **OK** to delete the template, or **Cancel** to preserve the template.

5.2.2.3. Manage Views

The *Manage Views* function is used to control view ways of a user. It has three tabs: **View**, **ECM Templates** and **BC Templates** tabs.

To open the **Manage View** function, go to **Group** → **Administration** then click on **Content Presentation** → **Manage View**. The **Manage View** form opens.



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

Views Tab. On the **Views** tab you can add, edit, delete or preview views.

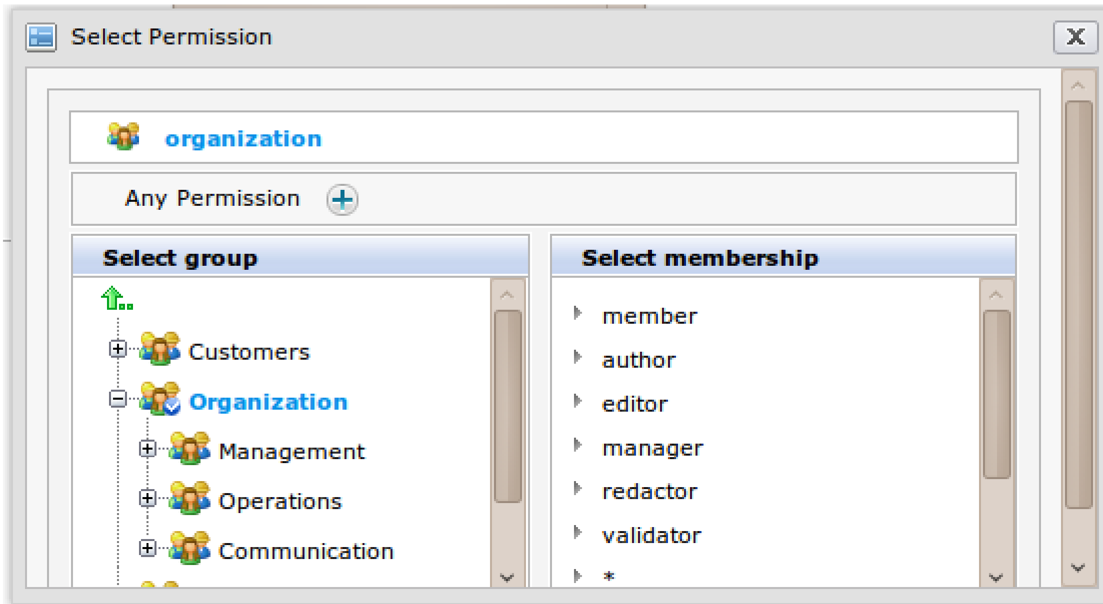
Procedure 5.12. Add View

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

   The **Add View** form opens.

2. Specify the name of the view you are creating in the **Name** field. The name must be unique, and must only contain standard alphanumeric characters.

3. Select the group from the left panel and the membership from the right panel.



4. Click the **Templates** field and select the correct template for this view.

5. Click **Save** to apply all settings and close the form.

Procedure 5.13. Edit a View

1. Click the  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 apply changes.

c. Click the **Back** button to return to the **View Form** tab in the **Edit View** form.

4. Click **Save** to apply all changes in the View tab.

Procedure 5.14. Delete Views

1. Click the  icon corresponding to the view you want to delete.

   A confirmation message is displayed.

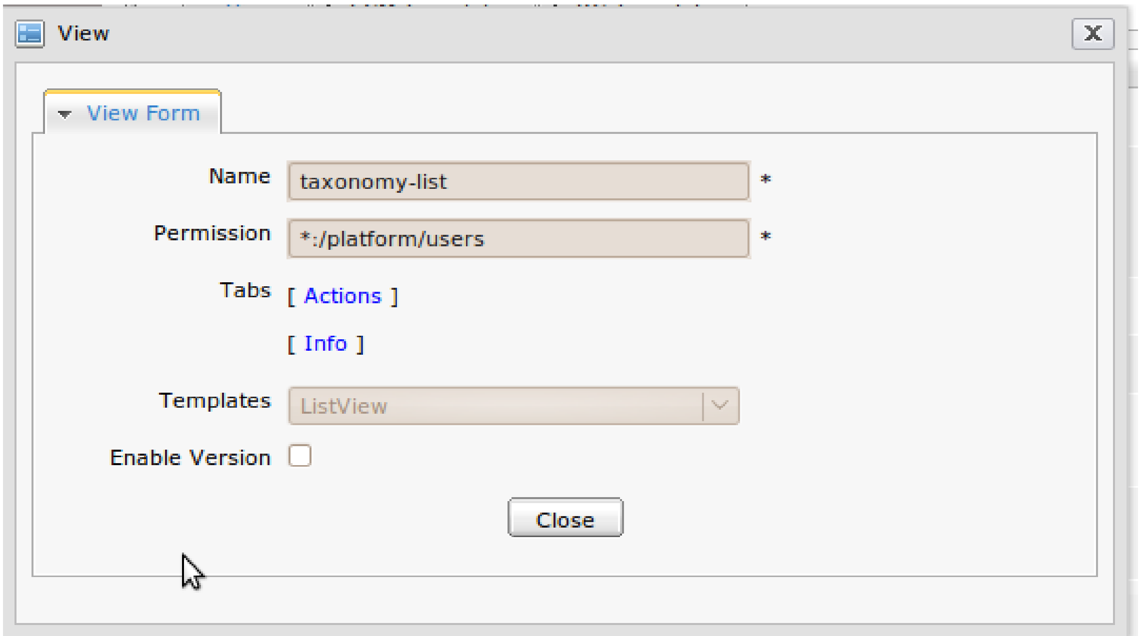
2. Click **OK** to delete the view.

> **Deleting the Current View**
>
> You cannot delete a view that is currently in use.

Procedure 5.15. Preview a View

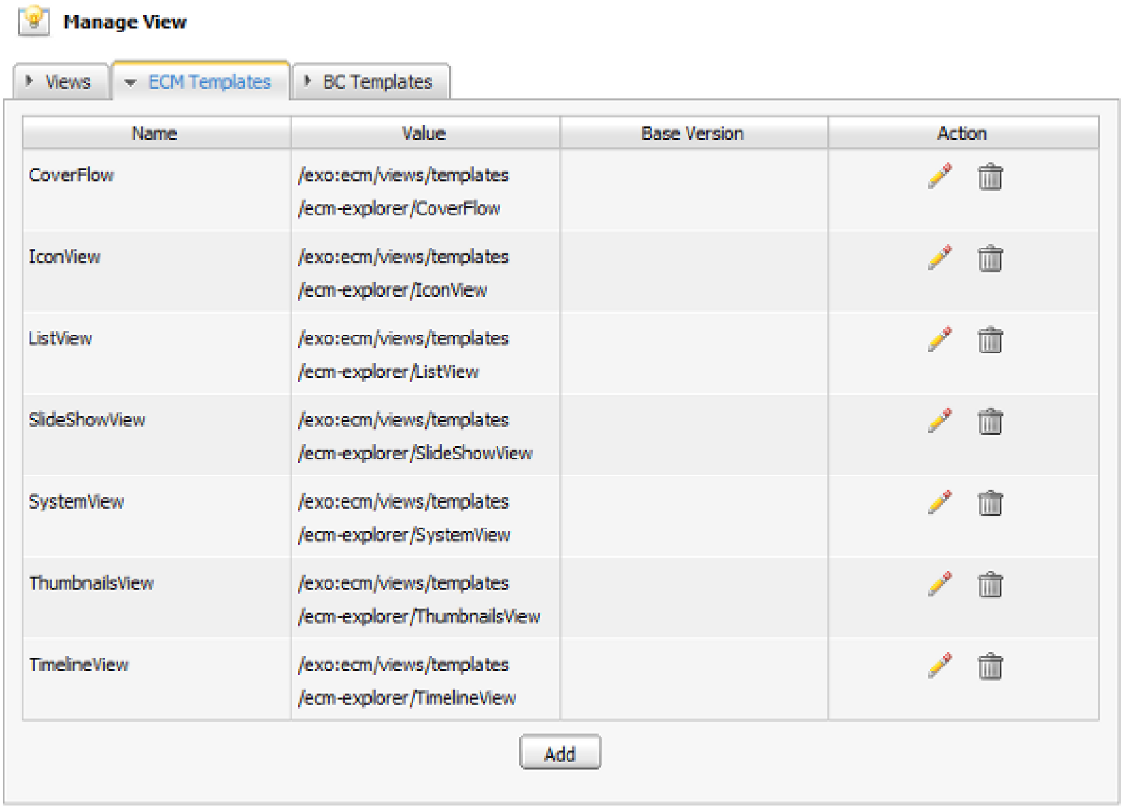
1. Click the  icon in the **Action** column of the view you want to preview.

   The **View Form** opens:



2. Click **Close** to exit the **View Form**.

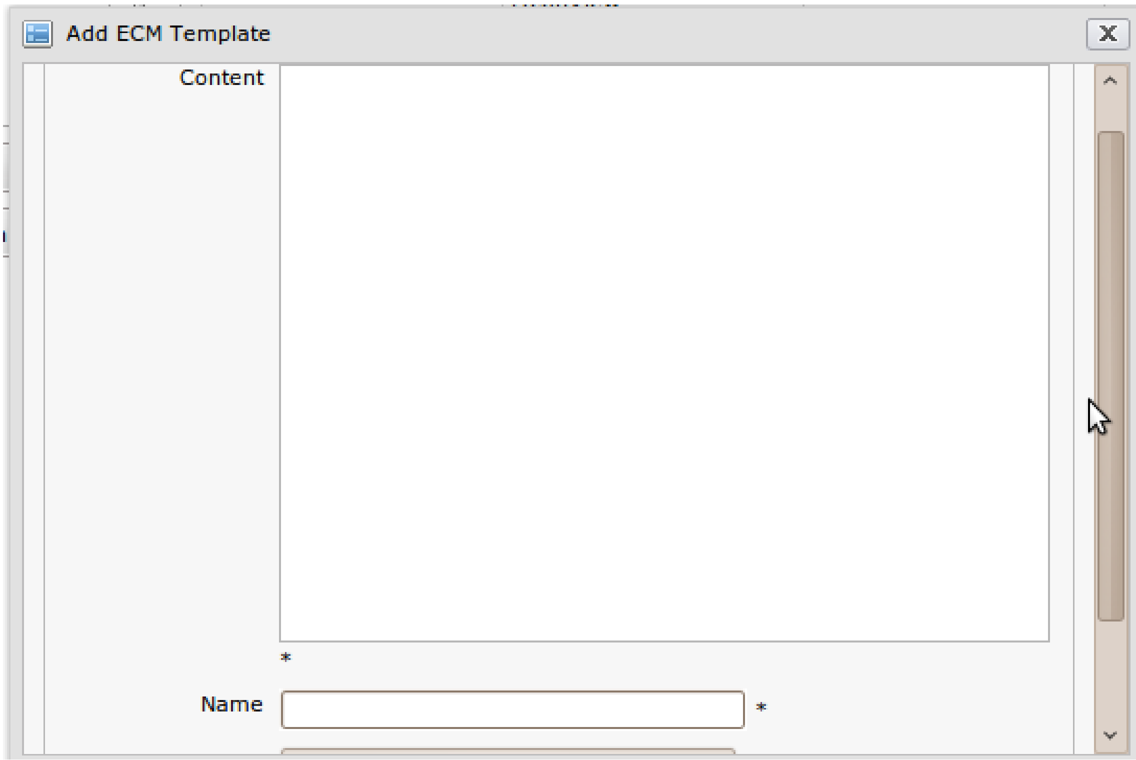
5.2.2.3.1. ECM Templates



Procedure 5.16. Add a new ECM Template

1. Select the **ECM Templates** tab.

2. Click the **Add** button to open the **Add ECM Template** form.



3. Enter the content of the template in the **Content** field.

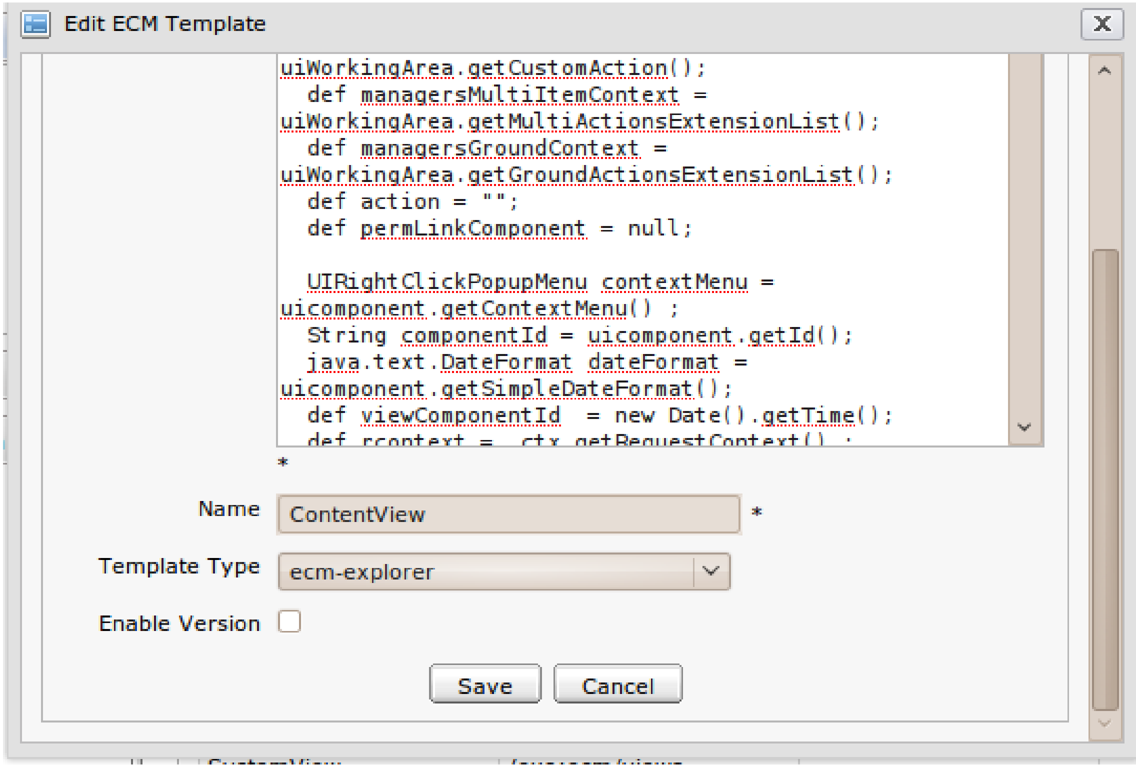
4. Enter a name for the template in the **Name** field.

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 5.17. Edit a Template

1. Click the  icon next to the template you want to edit.



2. Change the current template's properties.

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

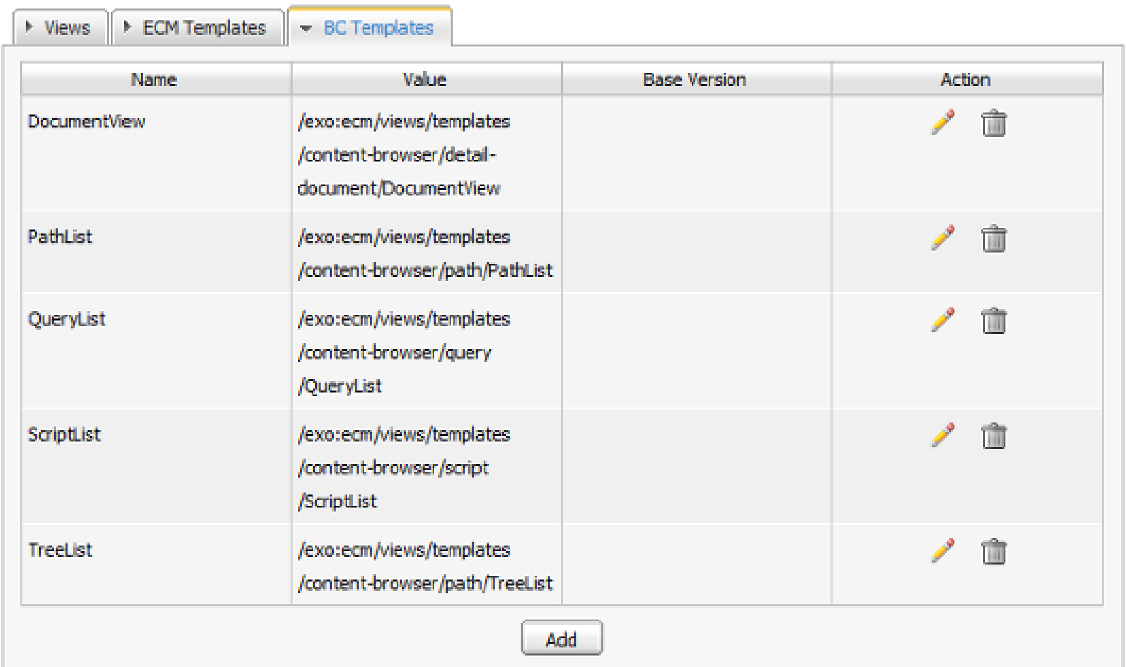
> **Template Names**
>
> You cannot edit the template name.
>
> If you tick the **Enable Version** checkbox, this template will automatically increase to one version after you have clicked **Save**. It is displayed at the **Base version** column in **ECM template** tab.
>
> If the template has at least two versions, in the **Edit ECM Template** form, it displays the **Restore** button that allows restoring the template version.

Procedure 5.18. Delete a Template

1. Click the  icon corresponding with the template you want to edit. A confirmation message will appear.

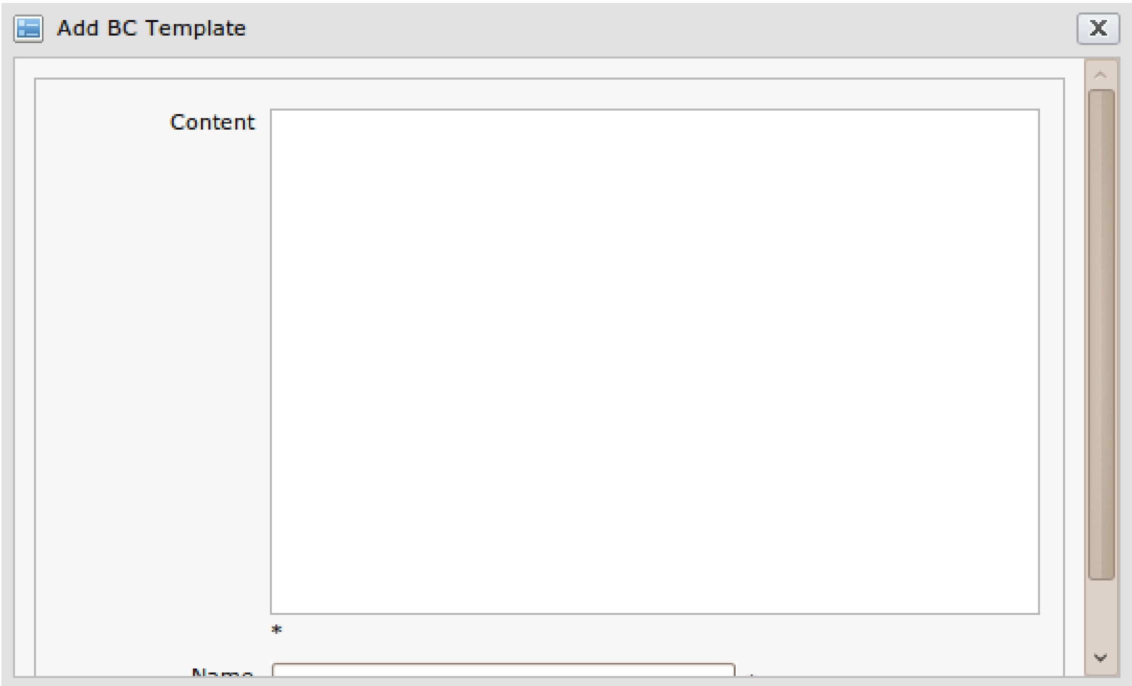
2. Click **OK** to accept deleting this template.

5.2.2.3.2. BC Templates



Procedure 5.19. Adding a New Template

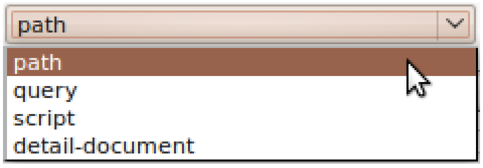
1. Click **Add** to open the Add BC Template form.



2. Enter the content for the template in the **Content** text box. This field is required (*).

3. Enter the name for the template in the **Name** field. This field is required (*).

4. Select the template type from the drop-down box in the **Template Type** form.

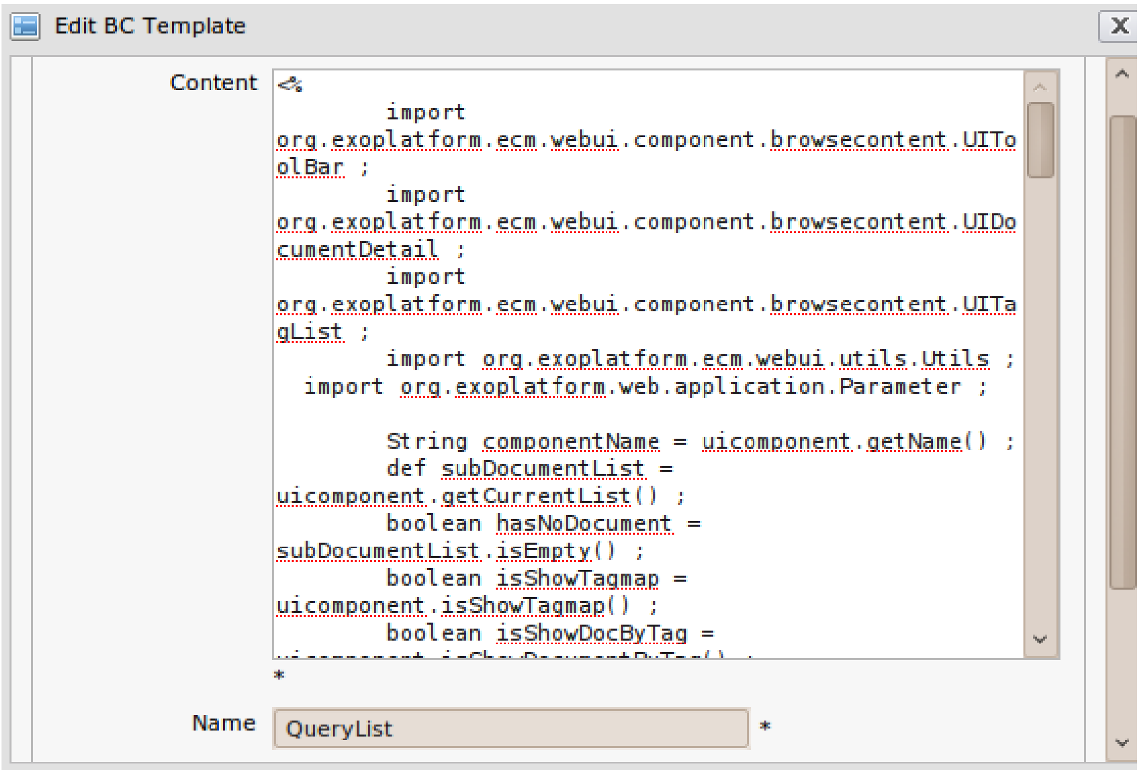


> **Note**
>
> The name must be unique.
>
> The name must not contain special characters like !,@,#,$,%,&,*,(,).

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

Procedure 5.20. Edit a BC Template

1. Click the  icon on a template that you want to edit.



2. Change the current template's properties.
3. Click **Save** to accept all changes.

> **Uneditable Fields**
>
> 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 one version after you have clicked **Save**. It is displayed at the **Base Version** column in **ECM Template** tab.

If the template has at least two versions, in the **Edit ECM Template** form, it displays the **Restore** button that allows restoring the template version.

Procedure 5.21. Delete a Template

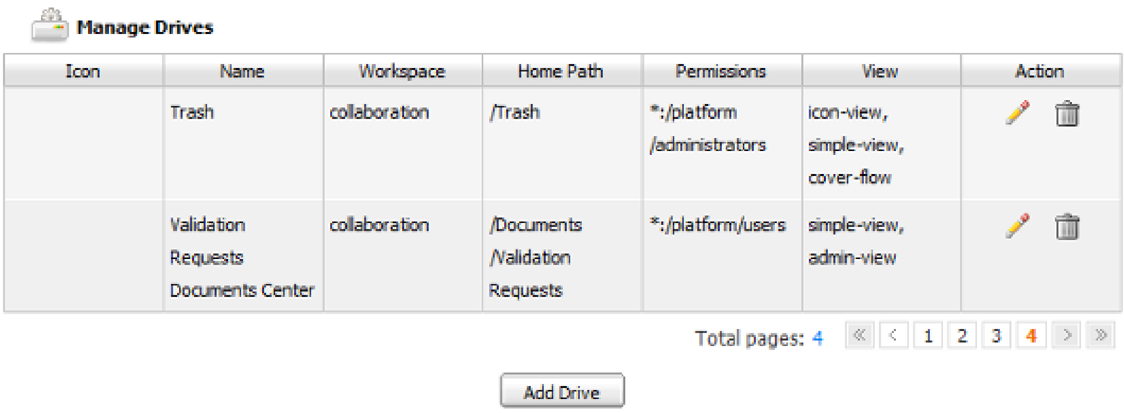
1. Click the icon corresponding with the template you want to edit. A confirmation message will appear.

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

5.2.2.4. Drives Management

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

Go to **Group** → **Administration** the go to **Content Presentation** → **Manage Drives**.


Manage Drives

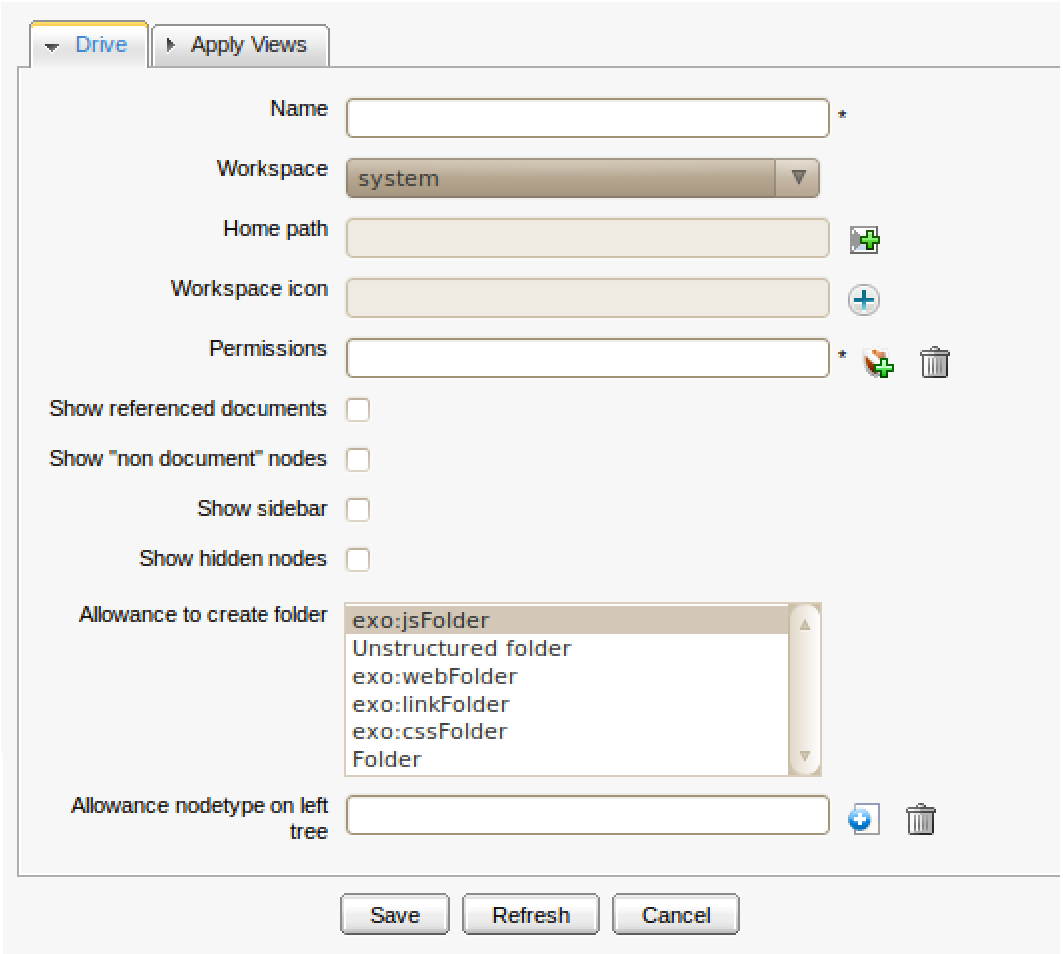
Icon	Name	Workspace	Home Path	Permissions	View	Action
	Trash	collaboration	/Trash	*:/platform /administrators	icon-view, simple-view, cover-flow	
	Validation Requests Documents Center	collaboration	/Documents /Validation Requests	*:/platform/users	simple-view, admin-view	

Total pages: 4 1 2 3 4

Add Drive

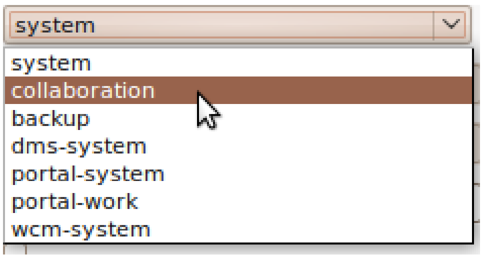
5.2.2.4.1. Add a new drive

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

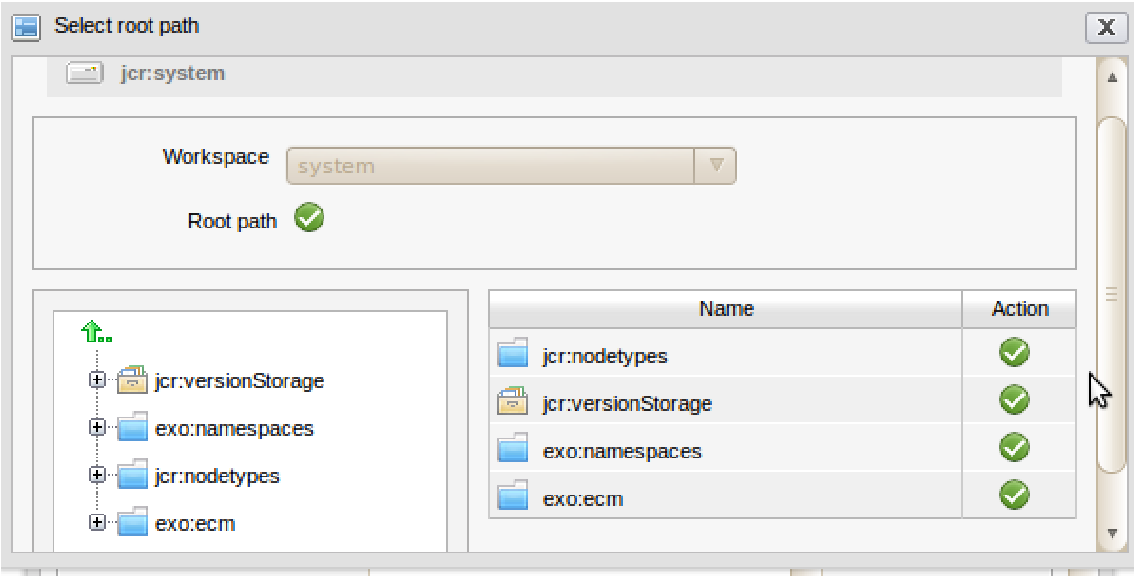


2. Enter a name for the new drive in the **Name** field. This field is required (*).

3. Select a workspace for the drive. There are four available workspaces: `system`, `collaboration`, `backup`, and `dms-system`.

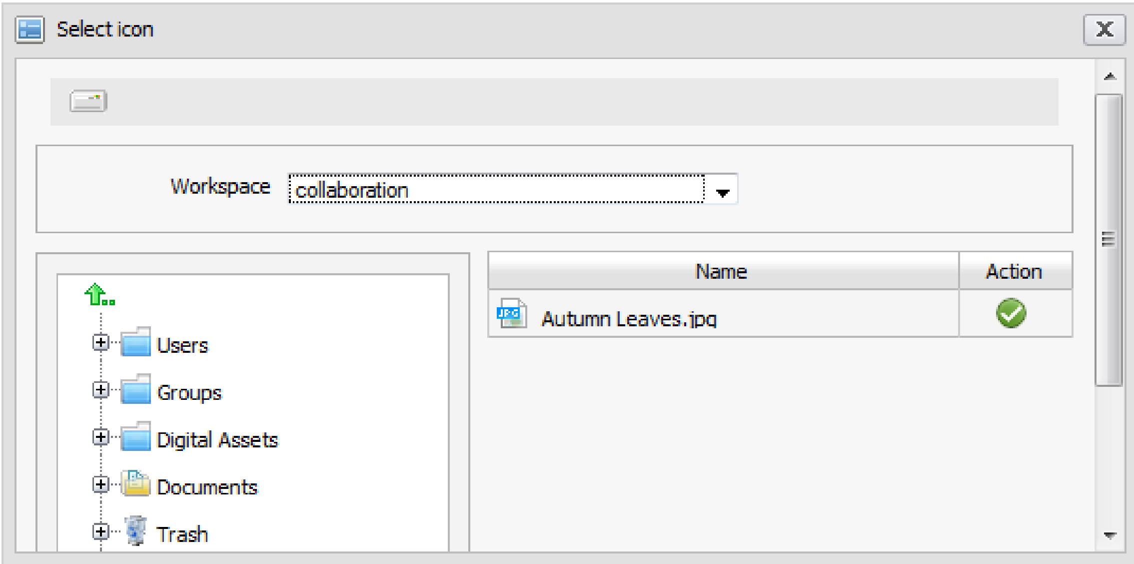


4. Select the home path for the drive by clicking the  icon beside the **Home path** entry.



5. Browse for an icon for the workspace by clicking the icon beside the **Workspace icon** entry.

6. Select an icon by clicking the corresponding to the desired icon file:



7. Select permissions for groups that have access rights to this drive by clicking the icon beside the **Permissions** entry.

8. Select or deselect 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.

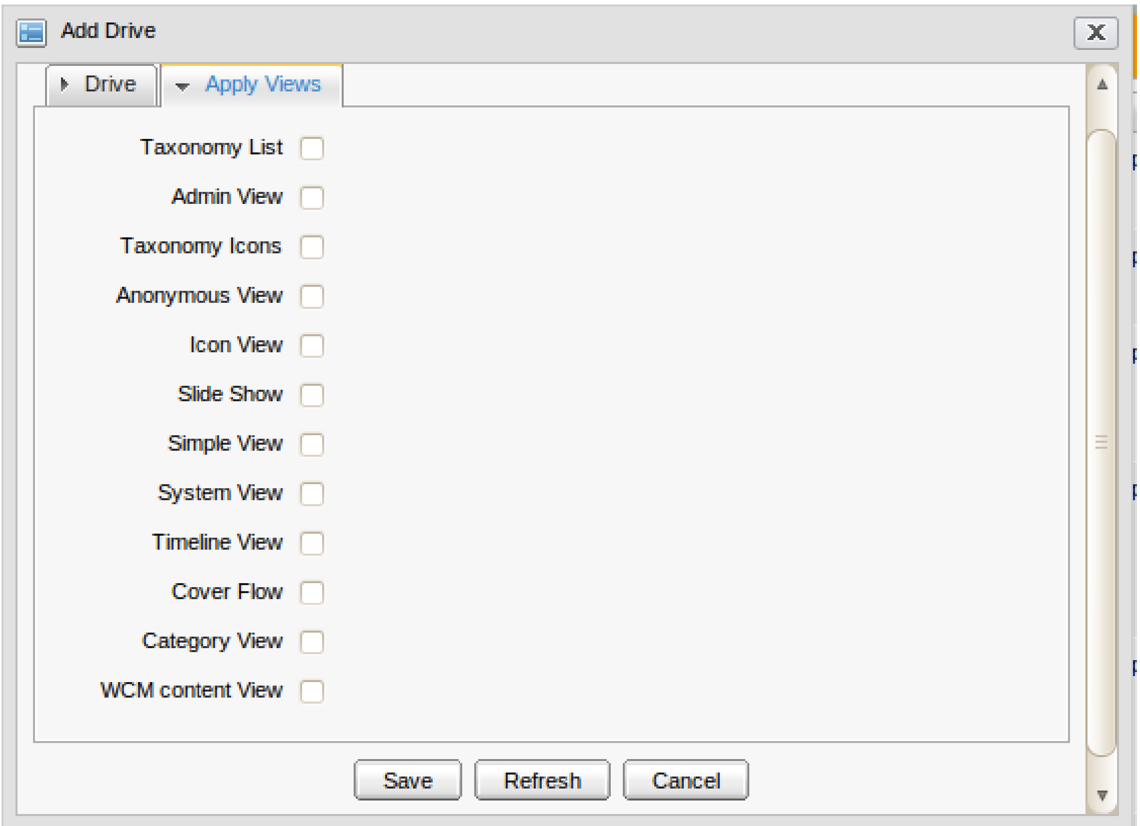
Show hidden node
: Allows showing the hidden nodes.

9. 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.

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



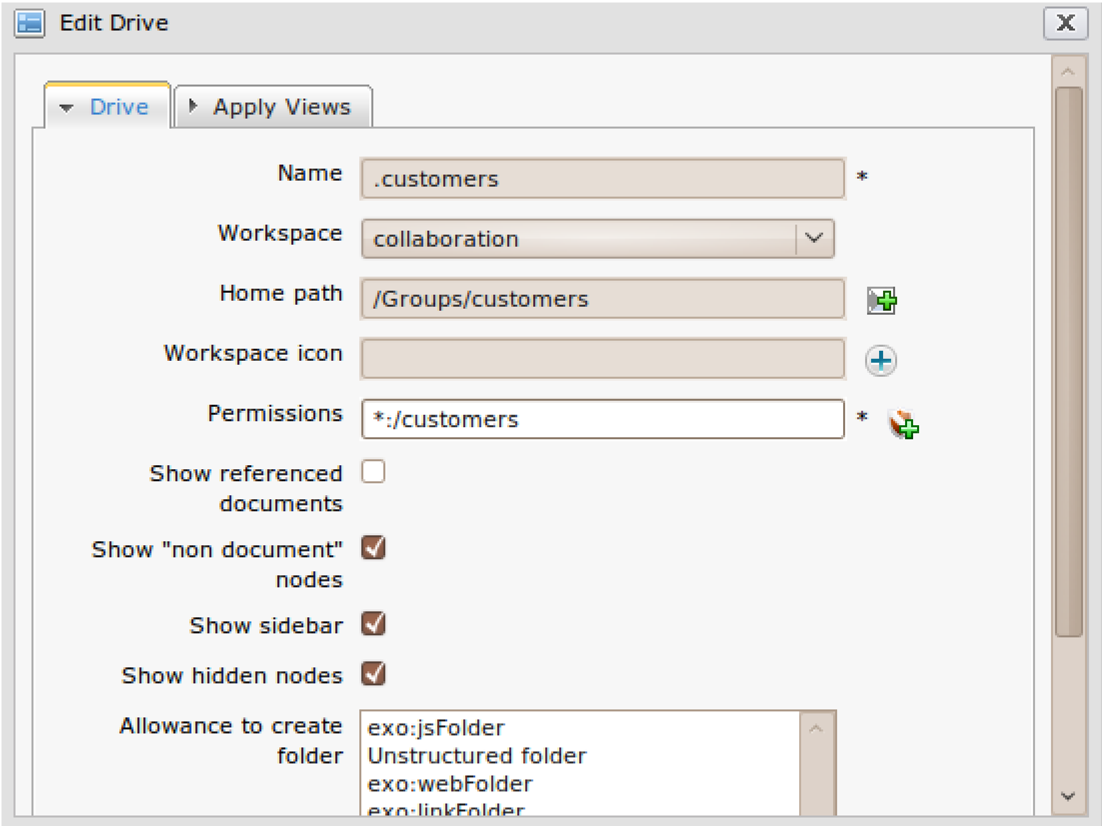
11. Click **Save** to commit the details and create the new drive, **Refresh** to clear the form or **Cancel** to abort the operation.

5.2.2.4.2. Edit a drive

To edit a drive, do the following:

Procedure 5.22. Edit a drive

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



2. Edit the properties as required.

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

> **Drive Name**
>
> The drive name cannot be edited in this form.

5.2.2.4.3. Delete a drive

To delete a drive, do the following:

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.

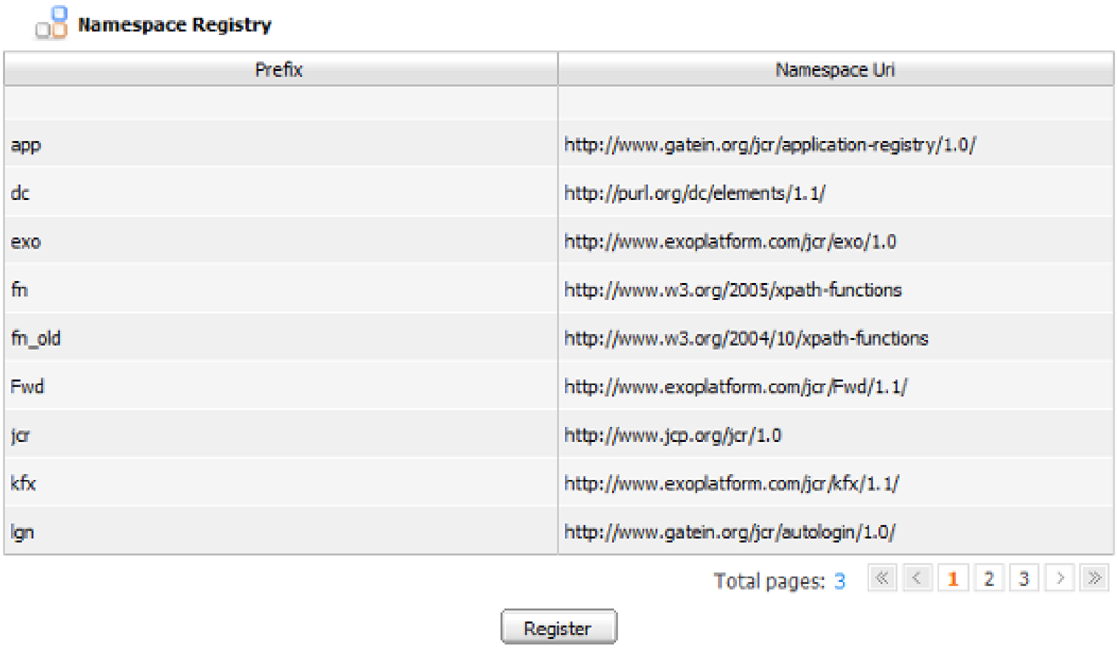
5.2.3. Content Types

5.2.3.1. The Namespace Registry

The namespace is a prefix in the node type name. It allows you to create node types without potentially conflicting with existing node types.

The registry helps you manage the namespaces used in the system.

Go to **Groups** → **Administration** the click on **Content Types** → **Namespace Registry** to open the Namespace Registry form.


Namespace Registry

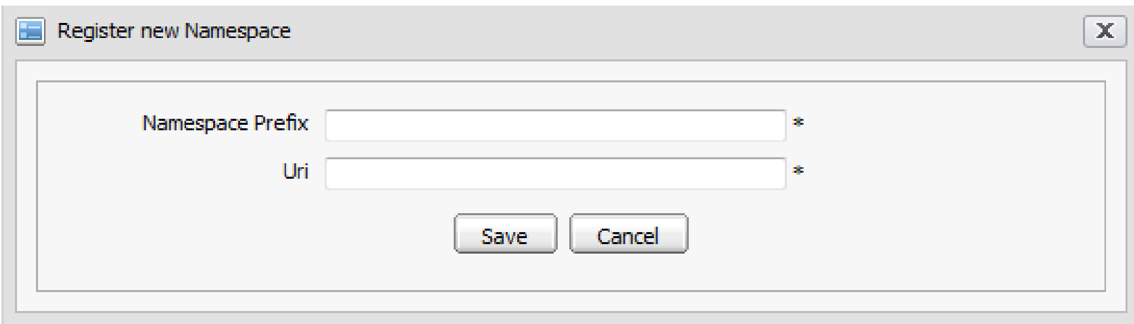
Prefix	Namespace Uri
app	http://www.gatein.org/jcr/application-registry/1.0/
dc	http://purl.org/dc/elements/1.1/
exo	http://www.exoplatform.com/jcr/exo/1.0
fn	http://www.w3.org/2005/xpath-functions
fn_old	http://www.w3.org/2004/10/xpath-functions
Fwd	http://www.exoplatform.com/jcr/Fwd/1.1/
jcr	http://www.jcp.org/jcr/1.0
kfx	http://www.exoplatform.com/jcr/kfx/1.1/
lgn	http://www.gatein.org/jcr/autologin/1.0/

Total pages: 3 1 2 3

Register

Procedure 5.23. Registering a Namespace

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



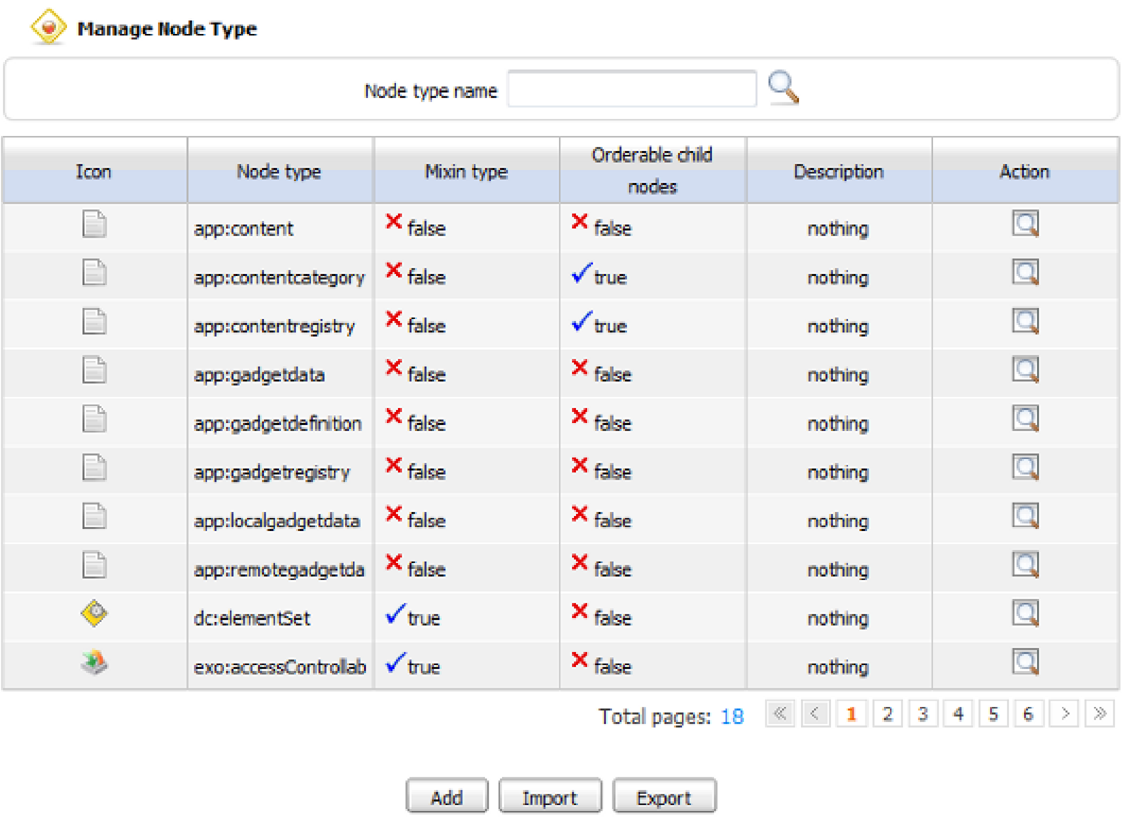
2. Enter a value for the **Namespace Prefix** field. This field is required (*).

3. Enter a value for the URI field. This field must be unique. This field is required (*).

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

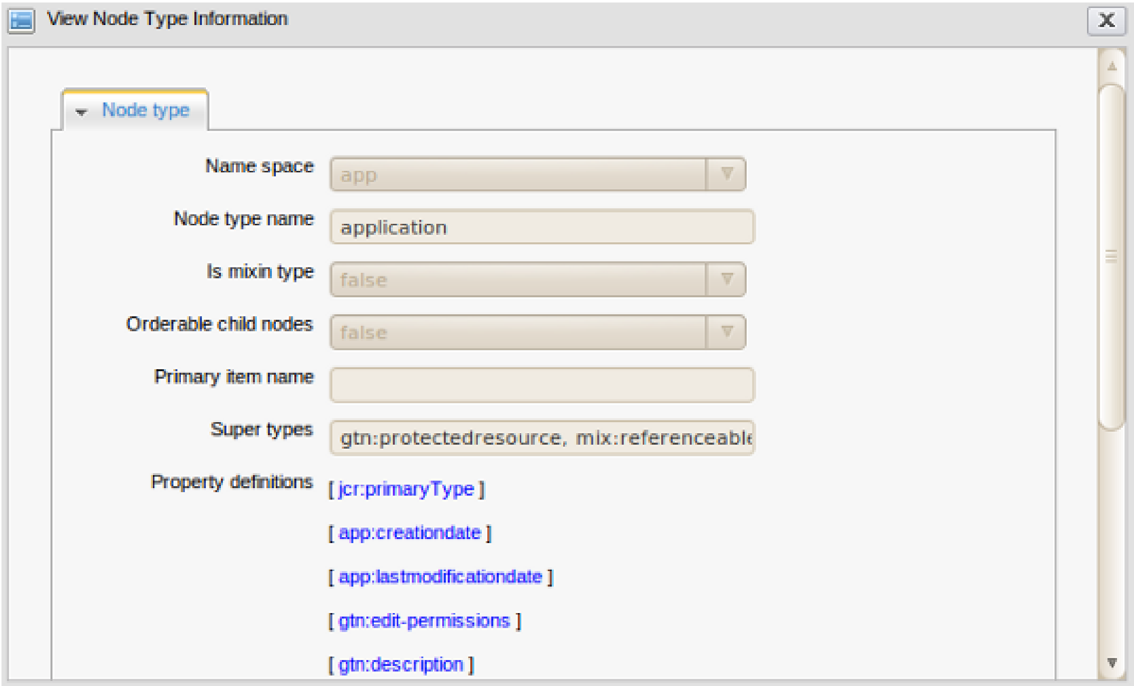
5.2.3.2. Manage Node Types

This function is used to control all node types in eXo Content.



5.2.3.3. View Node Types

1. Click the icon that corresponds to the node to be reviewed. The **View Node Type Information** form will appear.



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

Procedure 5.24. Add Node Type

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

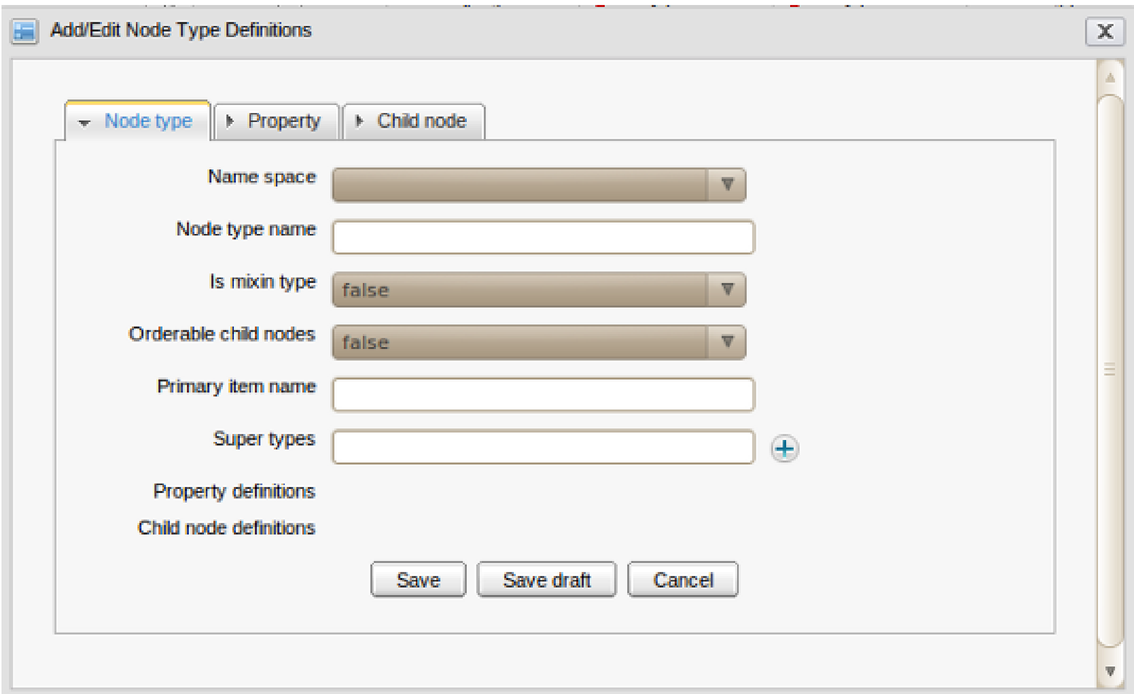


Figure 5.1. Add Node Type Form

2. Select a namespace for the node.

3. Enter a name in the Node type name field. This field is mandatory and its value must be unique.

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

4. Select a value for the **Is mixin type** field.

   - *`True`*: this node is `mixin` type.
   - *`False`*: this node is not `mixin` type.

5. Select a value for the **Orderable child nodes** field:

   - *`True`*: child nodes are ordered.
   - *`False`*: child nodes are not ordered.

6. Enter a value for the **Primary item name** field.

7. *`Super Types`*: Click the  button to add more parent types.

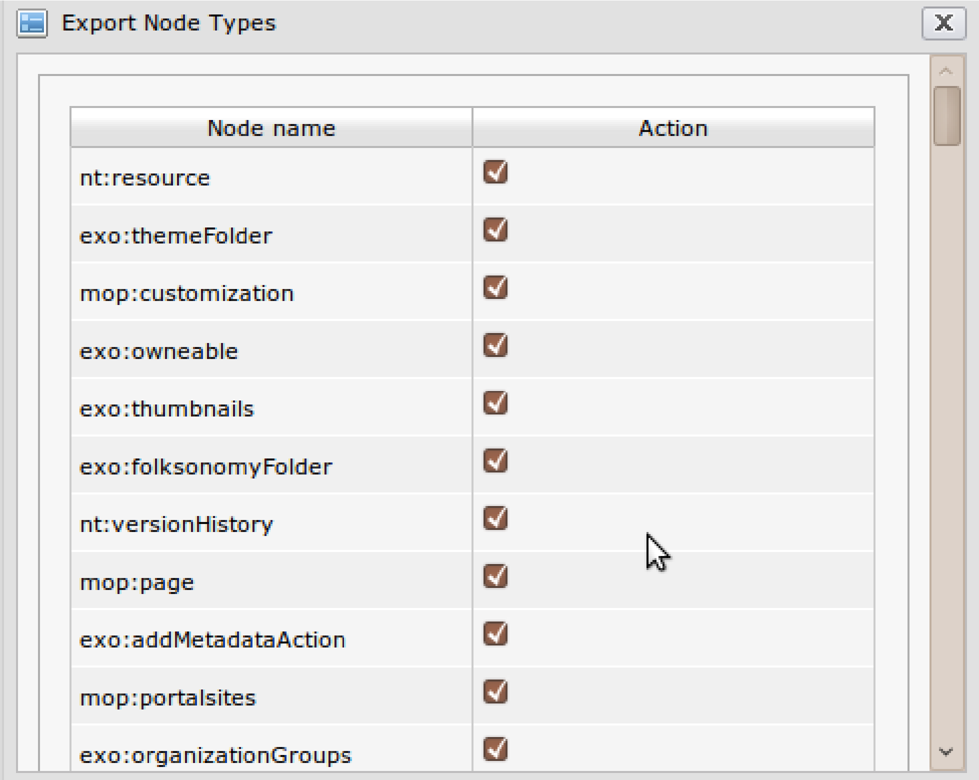
8. *`Property definitions`*: lists all definition names of **Property** tab.

9. *`Child node definitions`*: lists all definition names of **Child node** tab.

10. Click **Save** to accept adding a new node type, or **Save draft** to save this node type as a draft, or **Cancel** to quit.

Procedure 5.25. Export Node Types

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



2. Click **Uncheck all** if you do not want to export all node types. After clicking **Uncheck all**, this button becomes the **Check all** button.

3. Select nodes that you want to export by ticking the checkboxes.

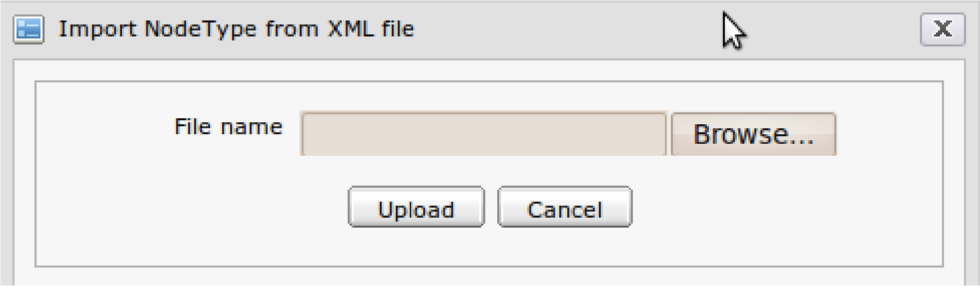
4. Click the **Export** button in this form.

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

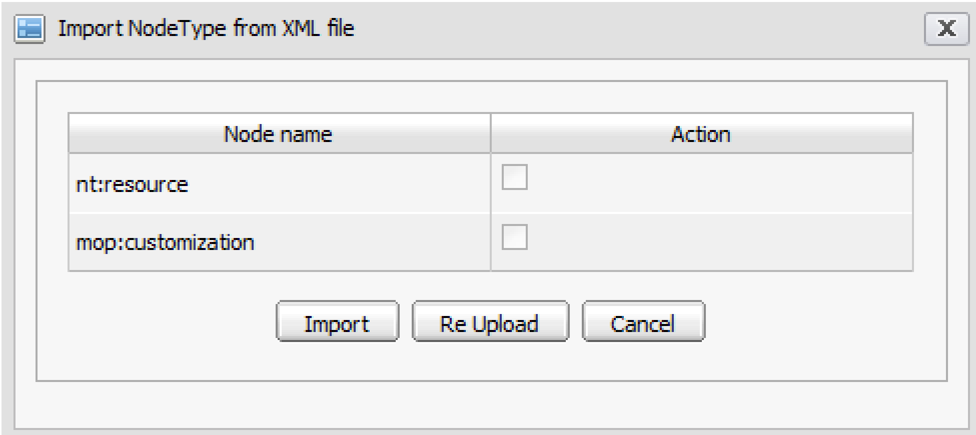
> **Important**
>
> You must select at least one node type to be exported. If you do not want to export the node, click **Cancel** to quit this pop-up.

Procedure 5.26. Import Node Types

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



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



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

3. Click the **Upload** button.

> **Note**
>
> If you want to upload a different file, click the icon to delete the file which has just been uploaded, then upload other files.

4. Tick the checkboxes corresponding to the nodes that you want to import.

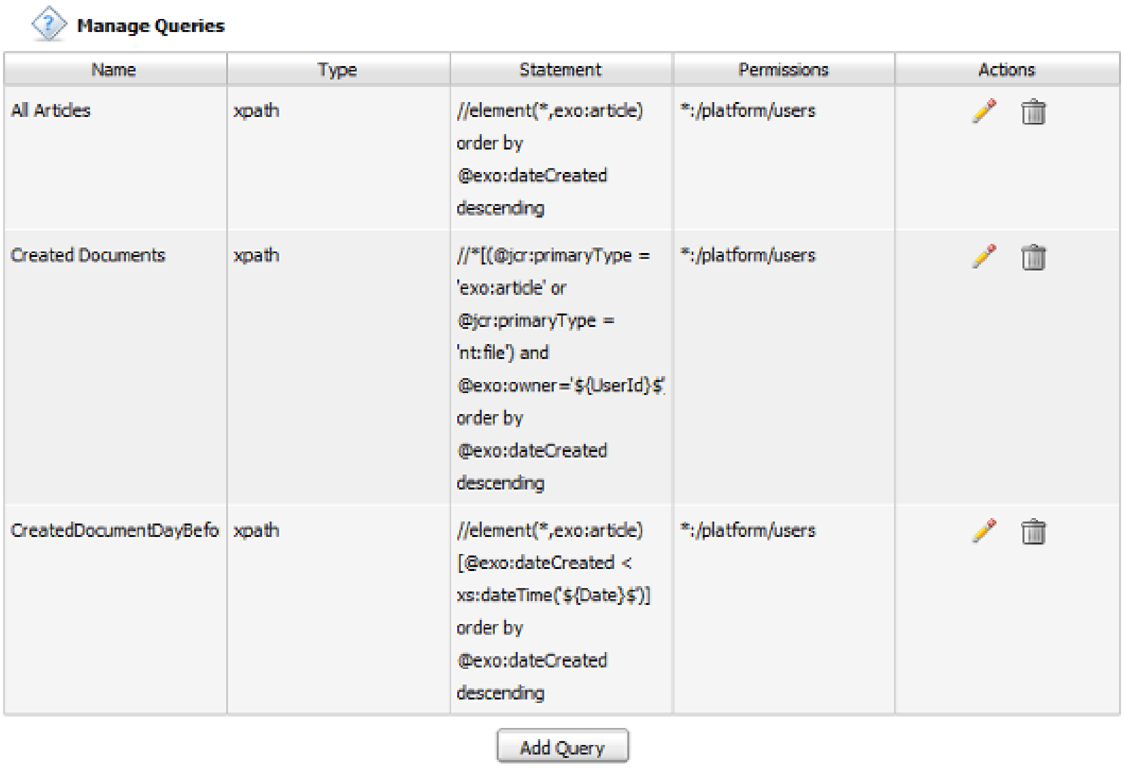
5. Click the **Import** button to complete importing a node type.

5.2.4. Advanced Configuration

5.2.4.1. Manage Queries

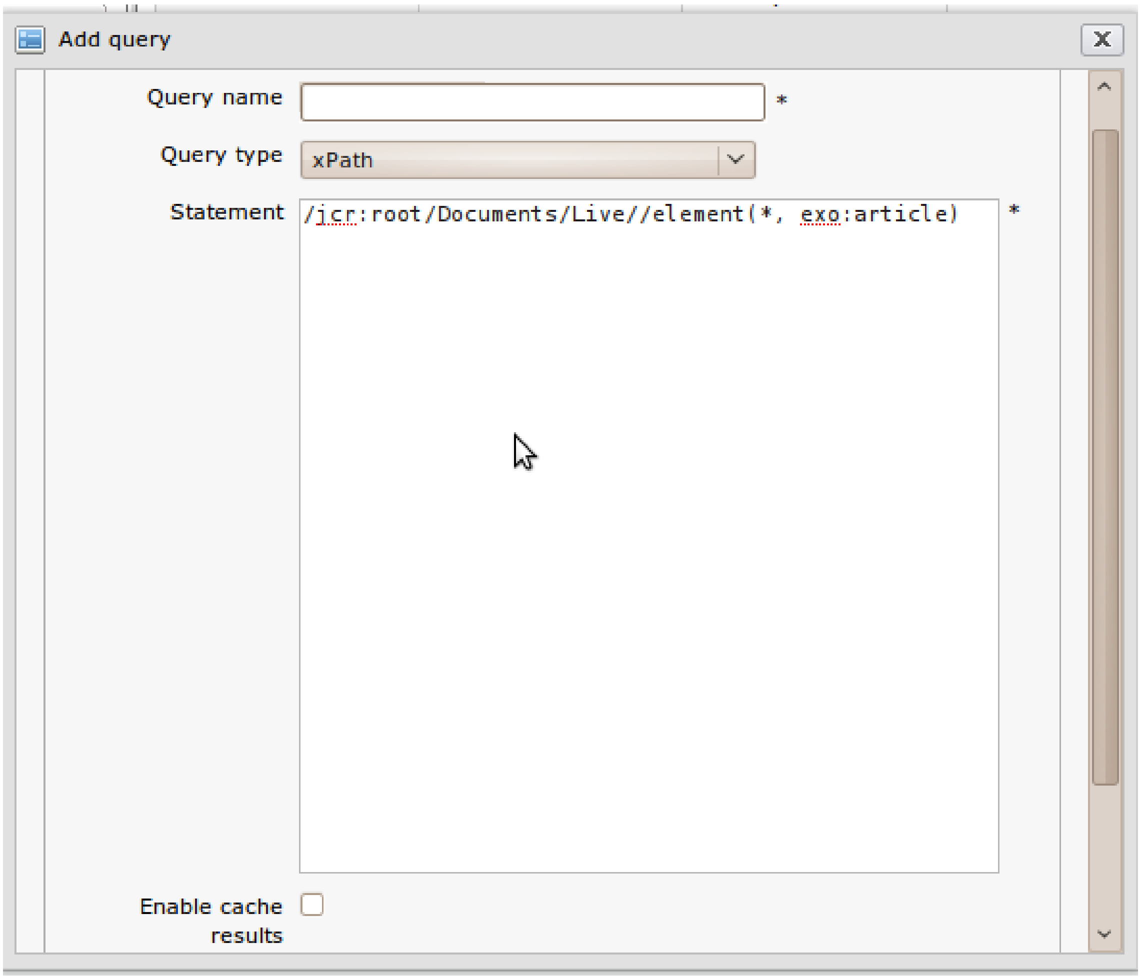
This function enables you to manage queries. It allows adding, editing and deleting queries.

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



Procedure 5.27. Add a new query

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



2. Enter a query name for the **Name** field.

3. Select the query type:

   Xpath
   : *XML Path Language* is a language for selecting nodes. For example, `/jcr:root/Documents/Live`.

   SQL
   : *Structured Query Language* is a database computer language.

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

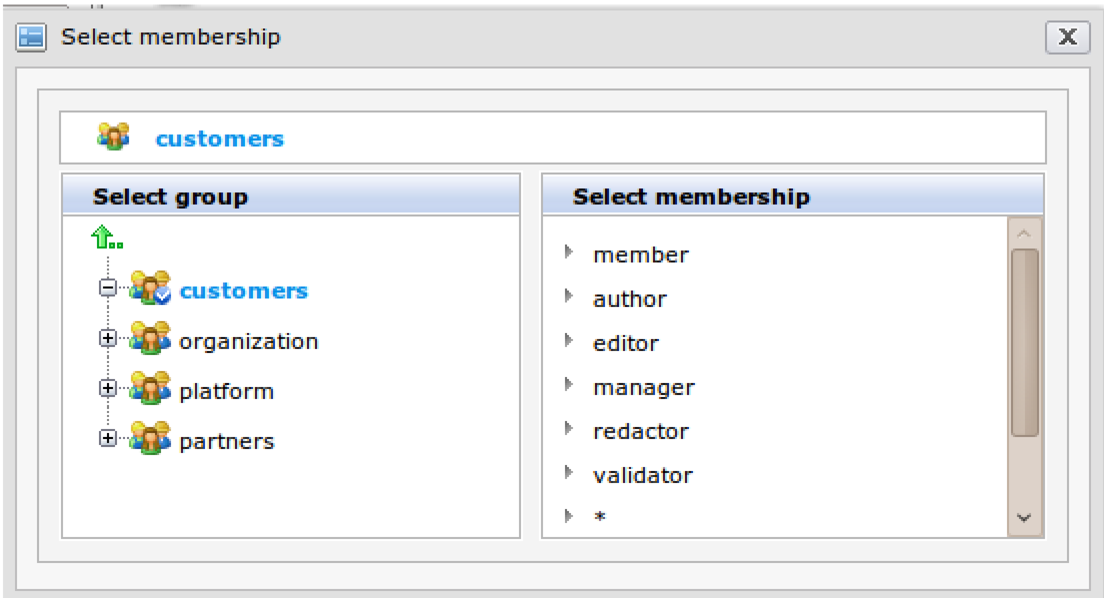
5. Check or uncheck the **Enable cache results** option. If you tick this checkbox, for the fist time you use this query to search, the result will be cached. For the second time you search using this query, it will show the cached results. After 45minutes, the cache will be removed.

Example 5.1.

- You have the query `Test` with the statement `//element (*, nt:file)`.

- In the File Explorer, you have a `nt:file` document named `File1`.
- When you execute the query `Test`, only the `File1` document will be shown.
- You 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.

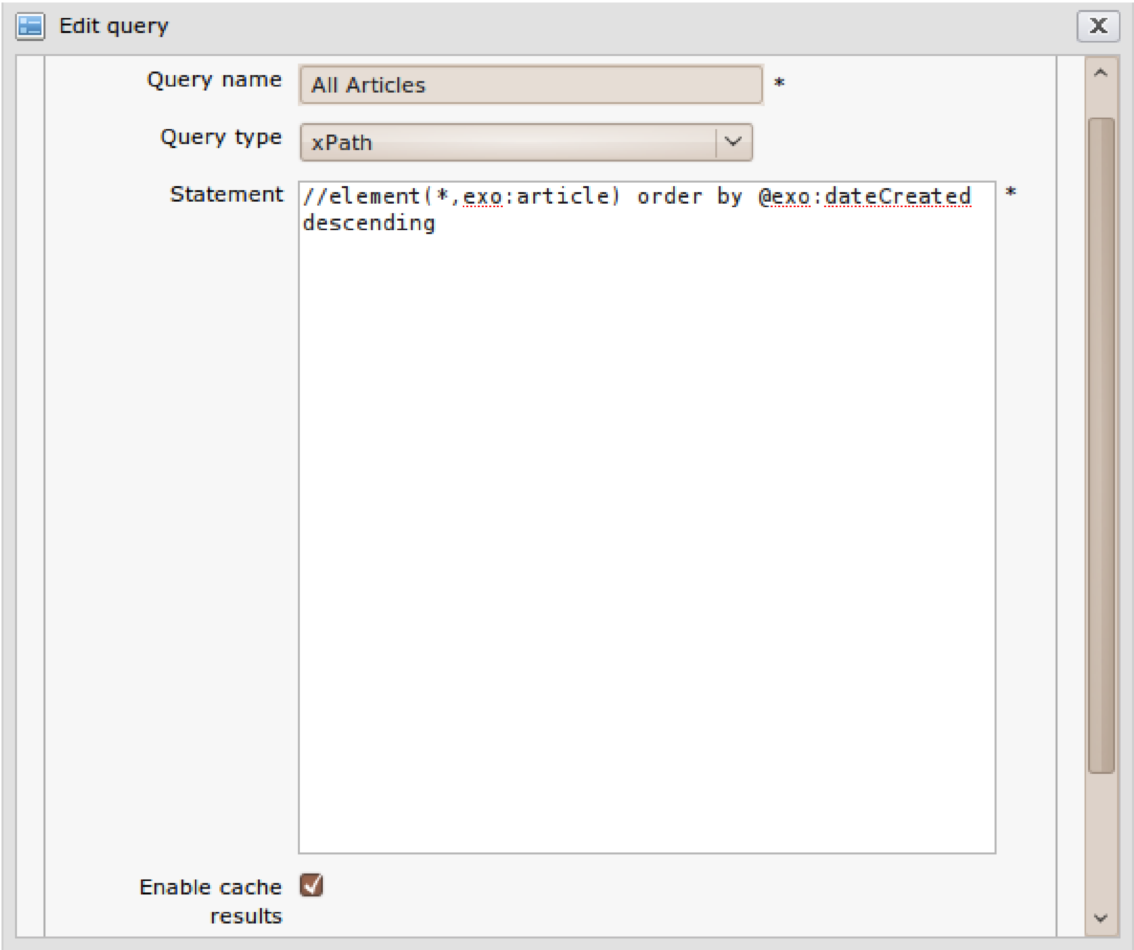
6. Select permissions for a group that can use this query by clicking the  icon.



7. Click **Save** to add the new query.

Procedure 5.28. Edit a query

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



2. Edit the properties of the selected query.

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

Procedure 5.29. Delete a query

1. Click  icon 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 the form.

5.2.4.2. Manage Scripts

The function enables users to manage all script codes in the **ECM** and **Browser Content** system.

Go to **Group** → **Administration** then go to **Advanced Configuration** → **Manage Scripts**.

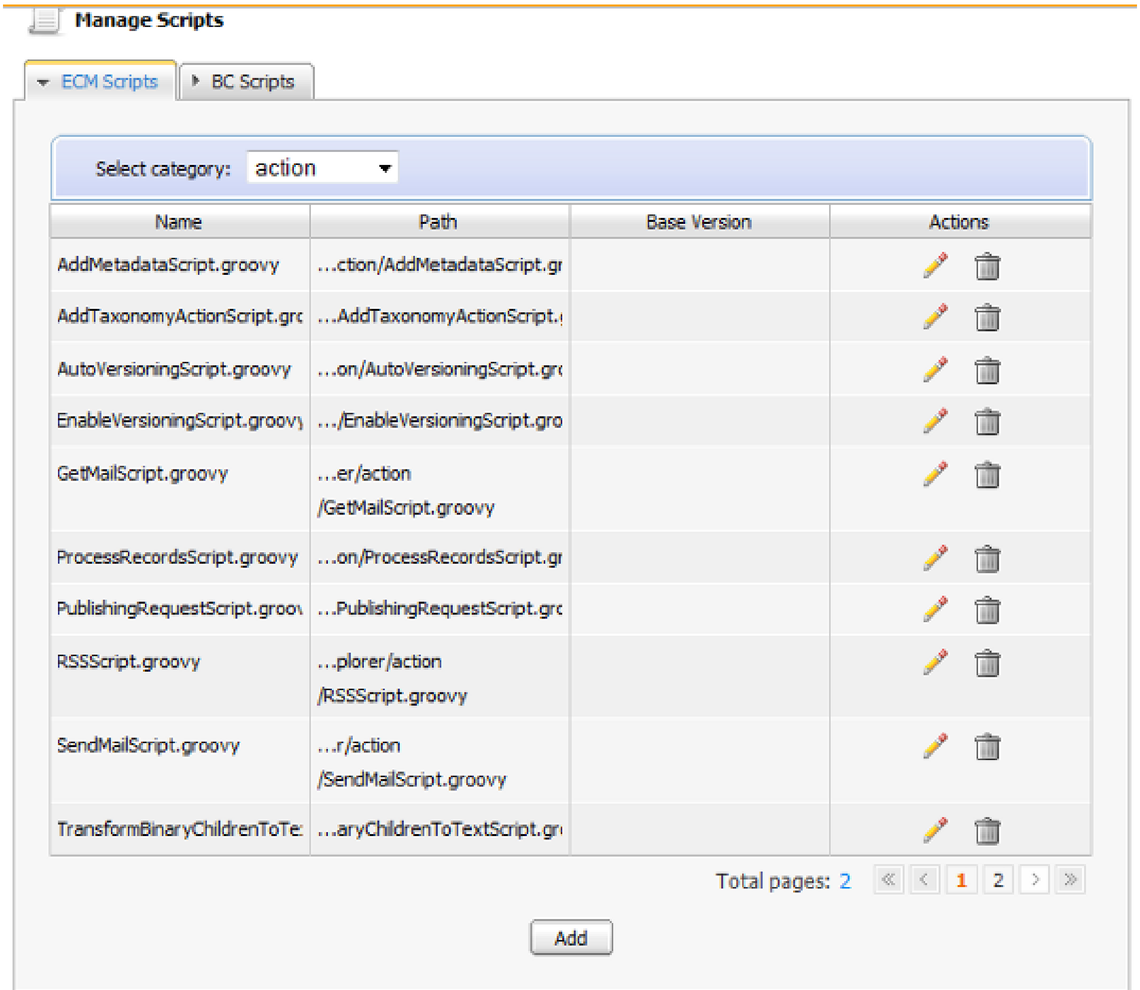
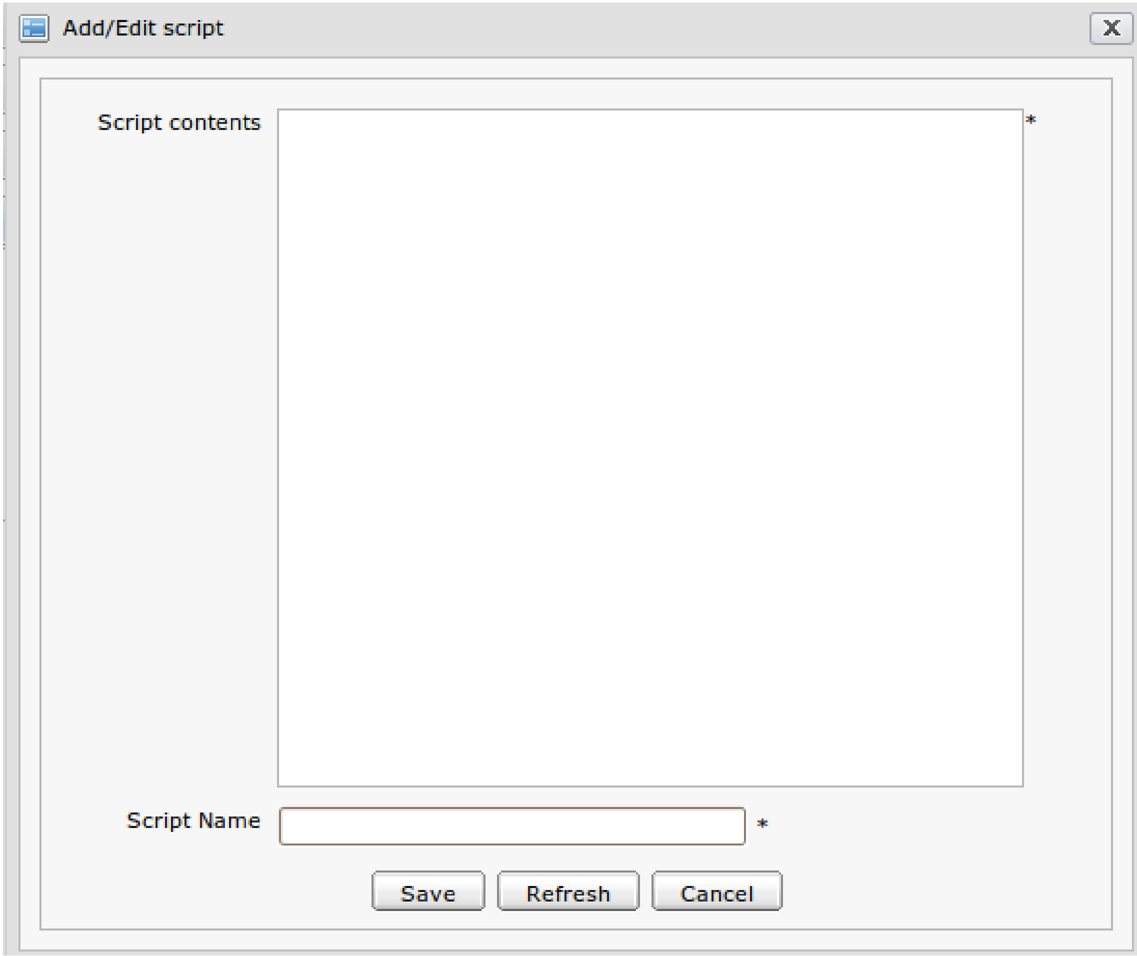


Table 5.2. Manage Scripts Form

Field	Details
ECM Scripts	These scripts are used in **eXo Content**.
BC Scripts	These scripts are used in **Content Browser**.

Procedure 5.30. Add a new script in ECM

1. Select the **ECM Scripts** tab in the **Manage Scripts** form.
2. Click the **Add** button to open the **Add/Edit script** form:



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

4. Enter a name in the **Script name** field.

   - The script name must be unique.

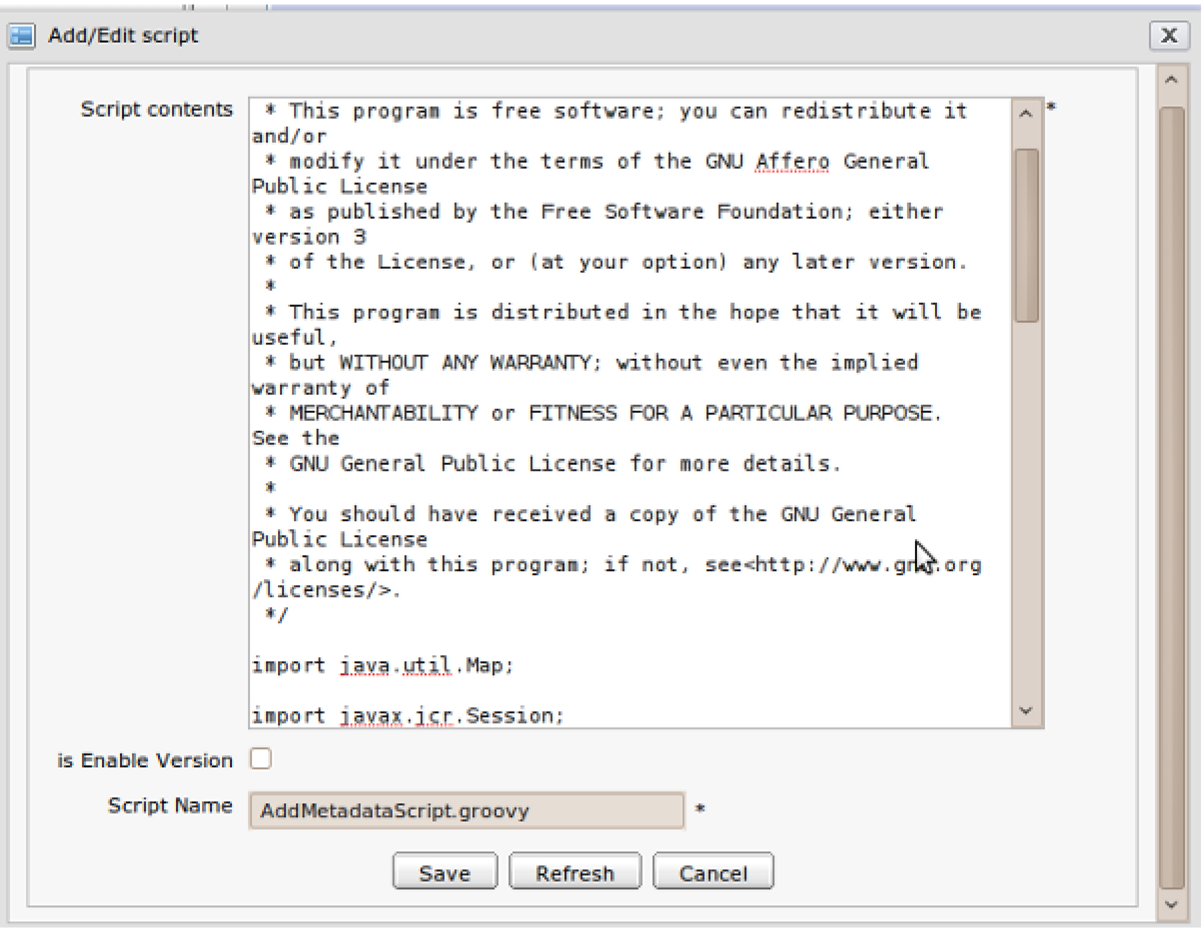
   - The name must not contain special characters such as !,@,#,$,%,&,*,(,).

5. Click **Save** to adding the new script.

Procedure 5.31. 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 5.32. Delete an ECM script

To delete an ECM script, do the following:

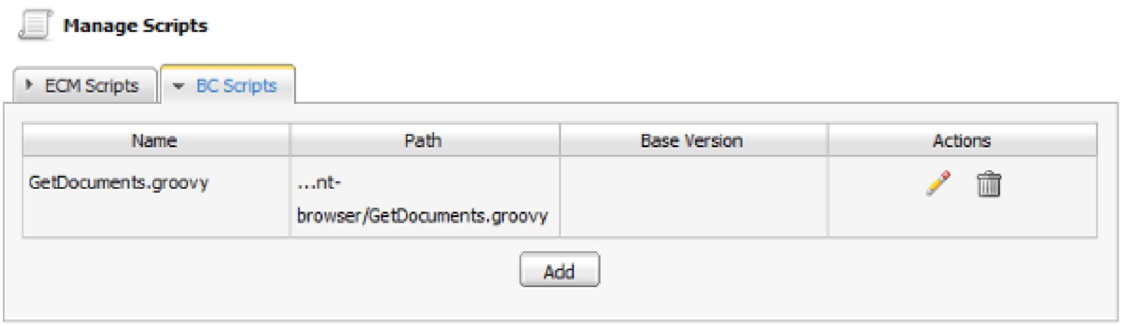
1. In the **ECM Scripts** tab, click the  icon on the script that you want to delete. A confirmation message will appear.

2. Click **OK** to delete this script or **Cancel** to discard this action.

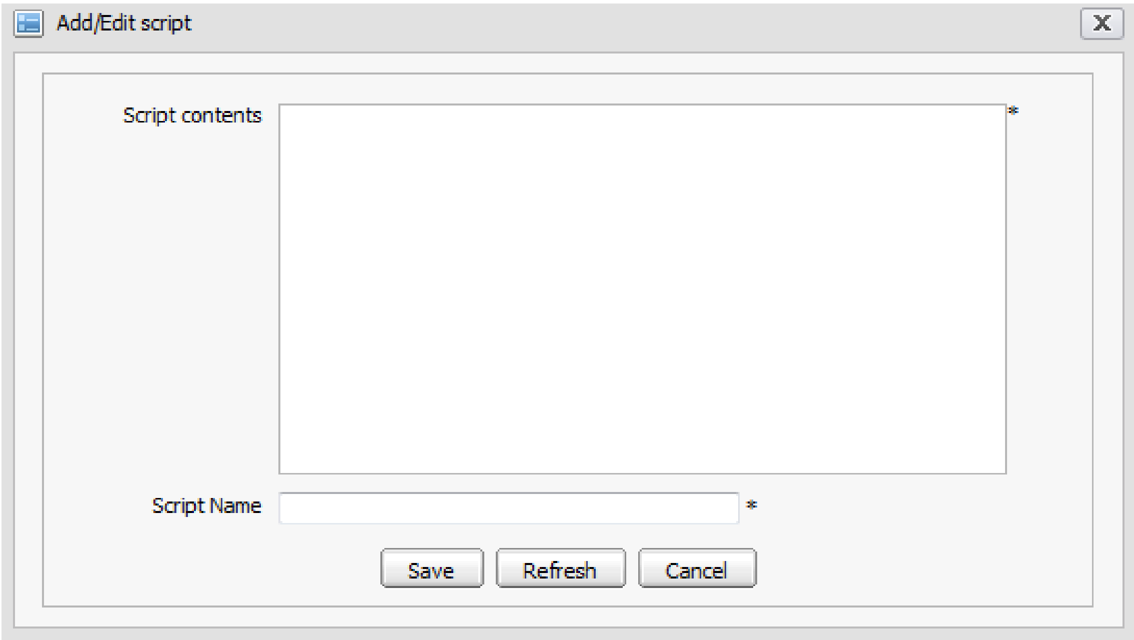
Procedure 5.33. Add a BC script

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:



3. Enter the script in the **Script content** field.

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

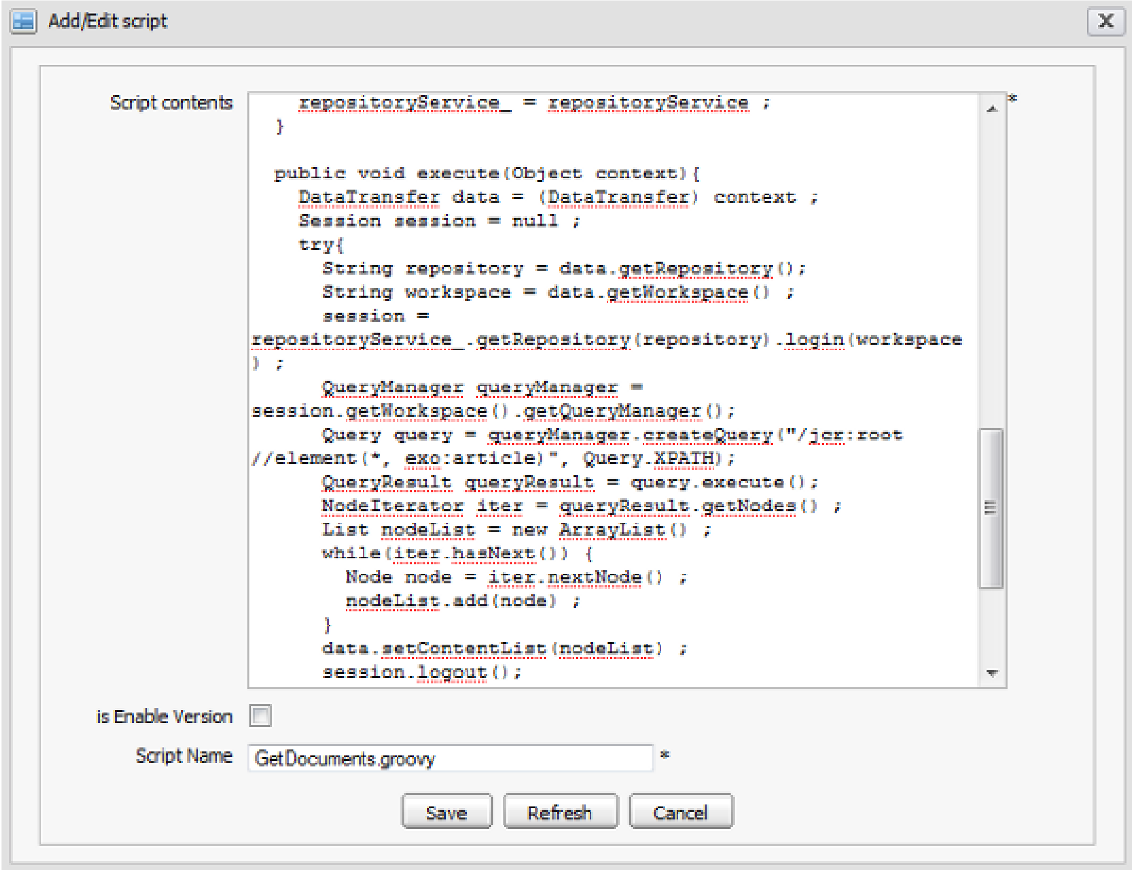
5. Click **Save** to finish adding the new script.

Procedure 5.34. Edit a BC script

To edit a BC script, do the following::

1. In the **BC Script** tab, click the  icon on a script that you want to edit.

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



2. Edit the properties as required.

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

Procedure 5.35. Delete a BC script

To delete a BC script, do the following:

1. In the **BC Scripts** tab, click the icon on the script you want to delete. A confirmation message appears.

2. Click **OK** to delete this script or **Cancel** to discard this action.

5.2.4.3. Manage Unlocks

All locked nodes are listed and managed by administrators in the **Administration page**.

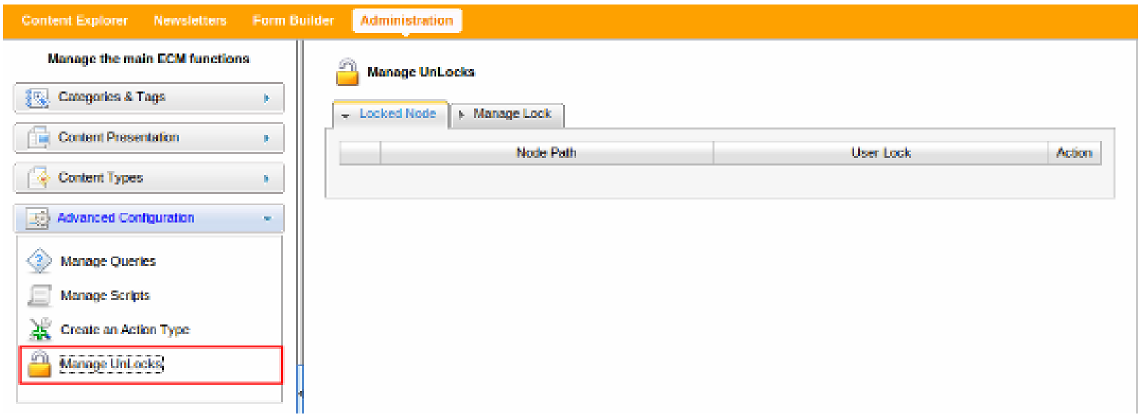
There are two ways that administrators can unlock nodes:

1. The **unlock nodes** in the right-click menu of Content Explorer.

2. **Manage Unlocks** in the **Administration page.**

Procedure 5.36. Manage Unlocks

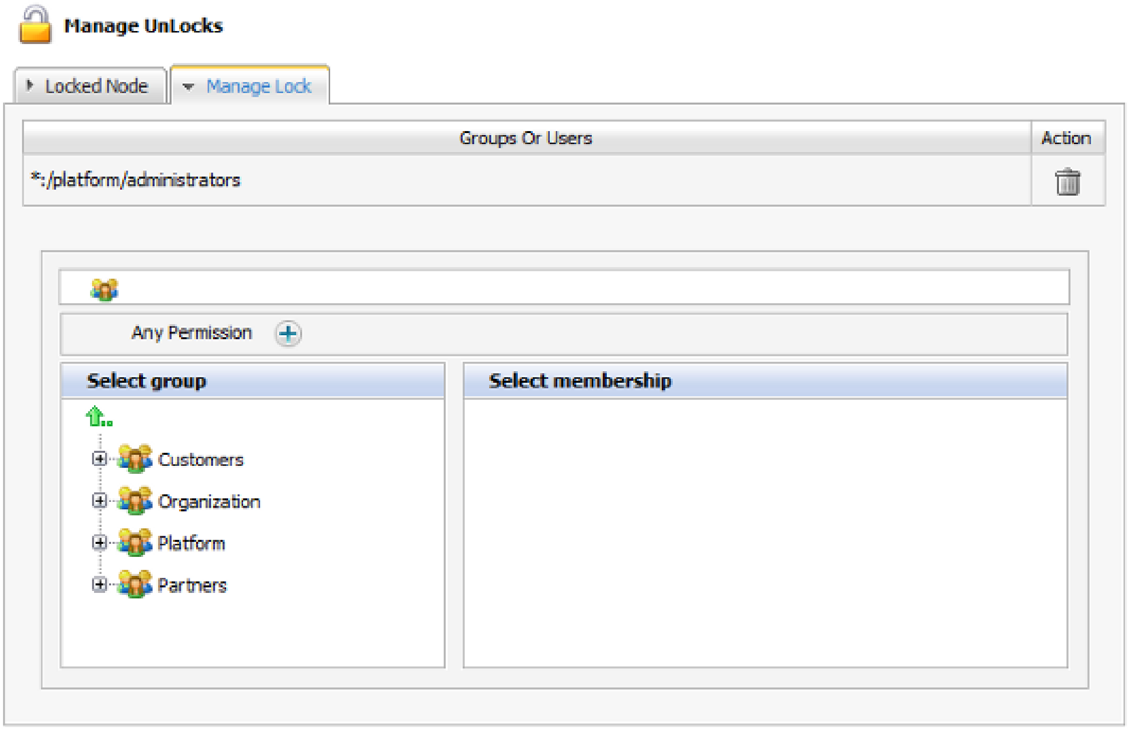
1. Go to **Group** → **Administration** on the navigation bar. Then go to **Advanced Configuration** → **Manage Unlocks**.



2. In the **Locked Node** tab on the right panel, administrators can unlock nodes by clicking the  icon that corresponds to nodes which need to be unlocked. The unlocked nodes will disappear from the locked node list.

   Administrators can manage and add the unlock permission for another group and users in the **Manage Lock** tab.

3. Select the group on the left-hand **Select group** panel and the corresponding membership on the right-hand **Select membership** panel. The selected group will be listed in the **Group and Users** column. However, administrators can also click the  icon if they want to allow any users to unlock nodes.



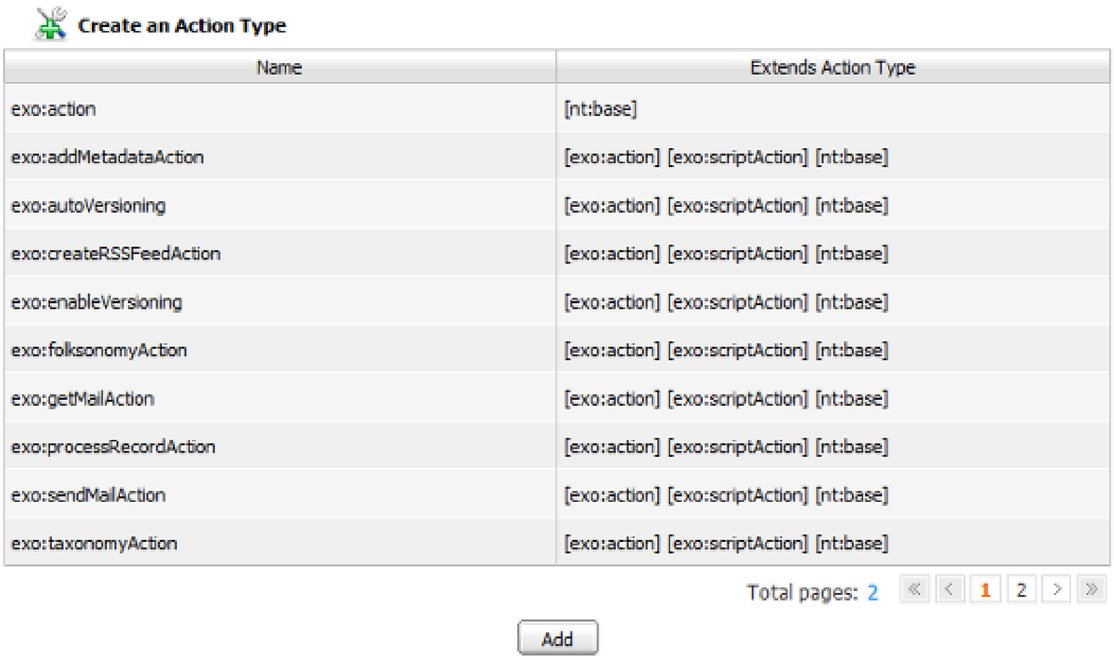
4. To remove the unlock permission of groups, click the icon that corresponds to the group in order to remove them form the Unlock permission list except the group `*:/platform/administrator` and `root`.

5.2.4.4. Create Action Types

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

Procedure 5.37. Create an Action Type

1. Go to **Group** → **Administration** on the navigation bar. Then go to **Advanced Configuration** → **Create an Action Type**.



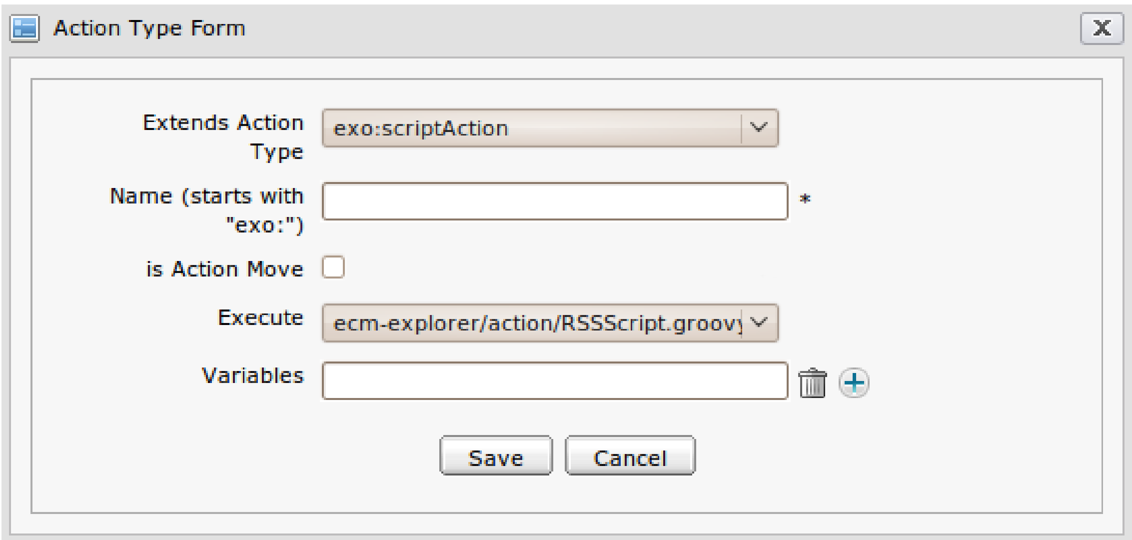
Create an Action Type

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 1 2

Add

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

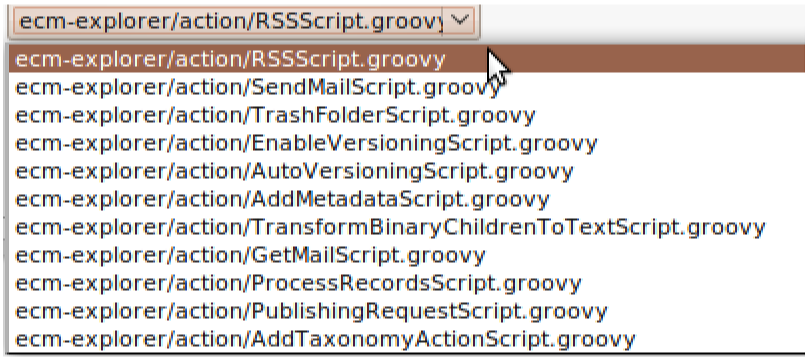


3. Select the action type.

4. Enter a name for the action.

5. Check or uncheck the **is Action Move** option: the action will have the *exo:move* property or not depending on the status of this switch.

6. Select an execute for the **Execute** field.



7. The **Variables** field allows creating multi-values for action. If you want to add more values for action, click the  icon. Alternatively, click the  icon to delete a value.

8. Click **Save** to the new action type.

Next Steps

While this User Guide is intended to provide a thorough explanation of features and terminologies within eXo Content you may have more questions or want to get involved, the following links can connect you with resources to learn more and contribute to the open source development process:

- *Learn more about eXo Platform 3.0* [http://www.exoplatform.com/company/public/website/platform]
- *Video demos, tutorial and more in the eXo Resource Center* [http://www.exoplatform.com/company/public/website/resource-center]
- *Access another eXo documents in the eXo Wiki* [http://wiki.exoplatform.com/xwiki/bin/view/Main/WebHome/]
- *Ask question about eXo Content in the Forum* [http://forums.exoplatform.org/portal/public/classic/forum]

Appendix A. Revision History

Revision History

Revision 1-2.3	Wed Dec 15 2010	ScottMumford<smumford@redhat.com>
Exported company-specific content to separate files.		
Revision 1-2.1.1	Fri Nov 19 2010	ScottMumford<smumford@redhat.com>
Updated docbook source to WCM 2.1.1		
Revision 1-2.0	Mon Oct 25 2010	ScottMumford<smumford@redhat.com>, LauraBailey, TomWells, EslpethThorne, RebeccaNewton, JaredMorgan
Completed docbook conversion.		
Revision 1-0	Tue Sep 28 2010	ScottMumford<smumford@redhat.com>
Initial creation of book by publican		