User Guide

A guide to using eXo Content.

by eXo Platform Documentation Team

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.

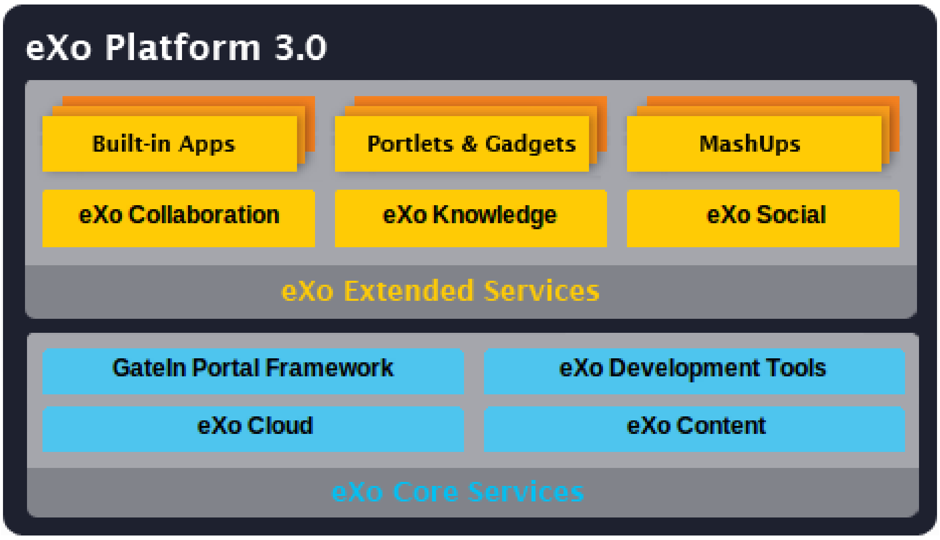
Be sure to give us your name so that you can receive full credit for reporting the issue.

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 in the whole world. eXo has actually opened the floodgates to various options in many markets, and customers have been choosing eXo as the best method for their success.

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



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

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

1.2. Why Use eXo Content

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

Website Creation

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

1.3. About This Document

The intended reader of this user guide are users using eXo Content. This 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.

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

- **root/ gtn**: This account is for users as Administrators who have the highest right on the platform.
- **mary/ gtn**: This account is for a publisher who can write content 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 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, reconstructed easily, which helps you keep your website under control.

eXo Content consists of three parts:

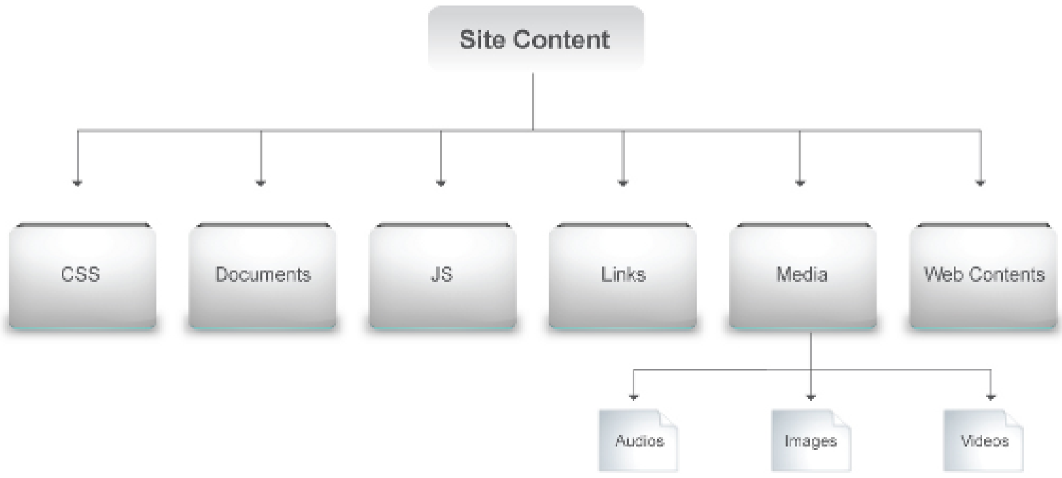
Document Management System (**DMS**) **-** an extension of eXo Content is used to store, manage and track electronic documents and electronic images and allows documents to be modified and managed easily and conveniently by managing versions, properties, and more.

Workflow: is the 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 (**WCM**): 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

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



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

Details:

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

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

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

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

Media:
: This folder includes three sub-folders:

    Audios:
    : Store all sound files used in a site.

    Images:
    : Store all images, pictures used in a site.

    Videos:
    : Store all video files used in a site.

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

2.3. Web Content

2.3.1. Web Content

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

2.3.2. Web Content Structure

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

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

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

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

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

2.4. Terminologies

2.4.1. Repository

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

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

2.4.2. Workspace

A content repository is composed of a number of workspaces. Workspace is a term used by several software vendors for applications that allow users to exchange and organize files over the Internet. In our case, the content repository consists of more than one workspace. The “repository” repository contains multiple workspaces, including : system, backup and collaboration workspace.

System workspace:
: is used to reserve “system folders”.

Backup workspace:
: The backup process depends on the published content timestamps, each published document has a duration for which it can be published and when it exceeds the timestamps, it will be automatically archived to the backup database. This workspace is mostly used when using the Workflow based content publication life-cycle.

Collaboration workspace:
: Allows users to validate and manage documents. This is the central place to store and edit content and media.

2.4.3. Drive

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

More specifically, a drive consists of:

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

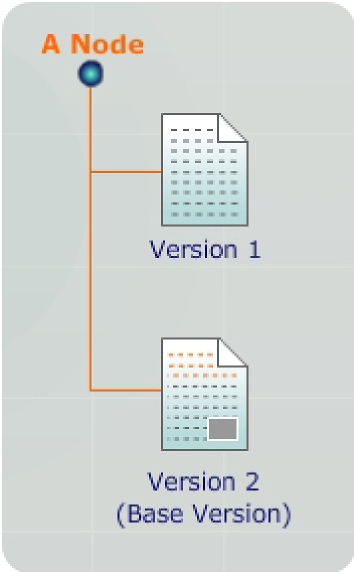
2.4.4. Node

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

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

2.4.5. Version

Versioning means that at any given time the node's state can be saved for possible future recovery and the action of saving called 'checking in'. A workspace may contain both versionable and non-versionable nodes. A node is versionable if it has been assigned a mixin type mixin:versionable; otherwise, it is a 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 node.



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

2.4.6. WebDAV

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

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

2.4.7. Podcast

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

2.4.8. File Plan

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

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

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

2.4.9. Symlink

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

Get Started

3.1. Account

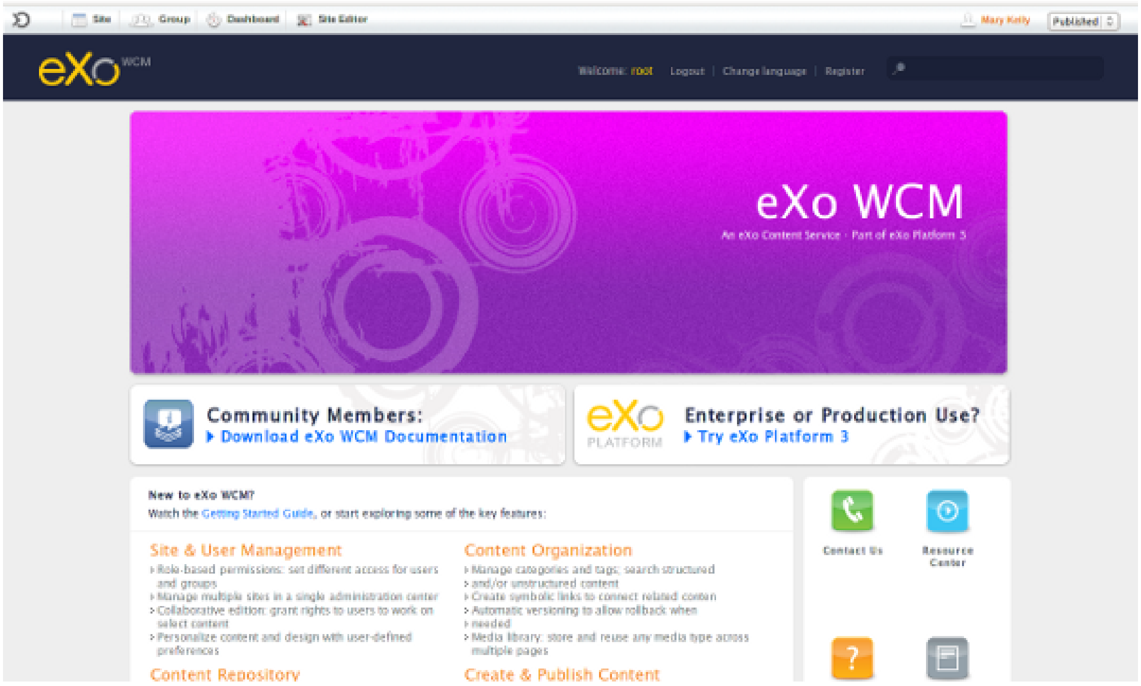
3.1.1. Register an account

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

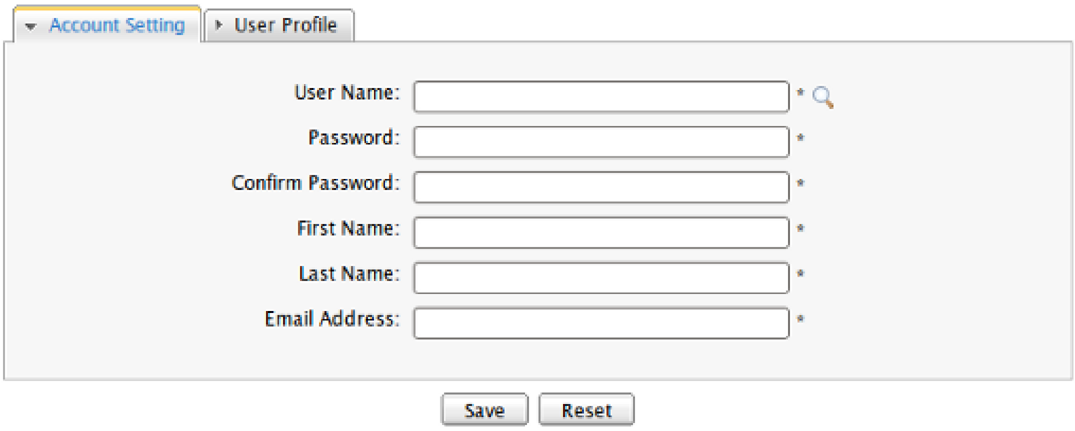
Procedure 3.1.

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

   The anonymous homepage will appear:



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



(*) required

The **Account Setting** information includes:

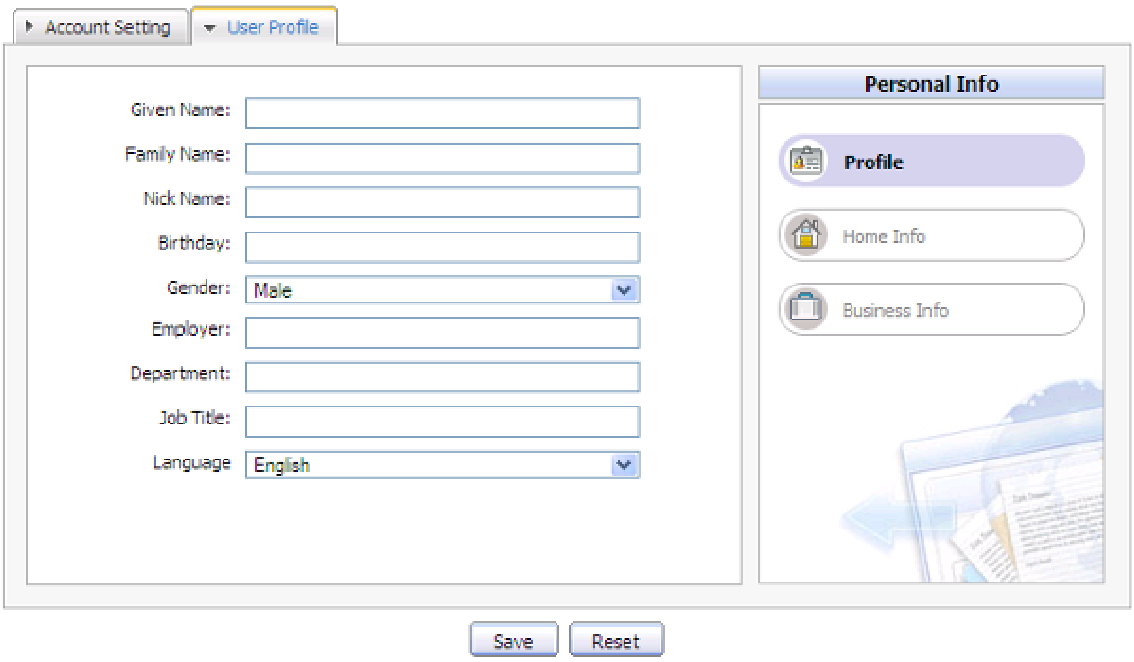
Table 3.1.

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

3. Input values for the fields in this form.

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

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



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

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

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

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

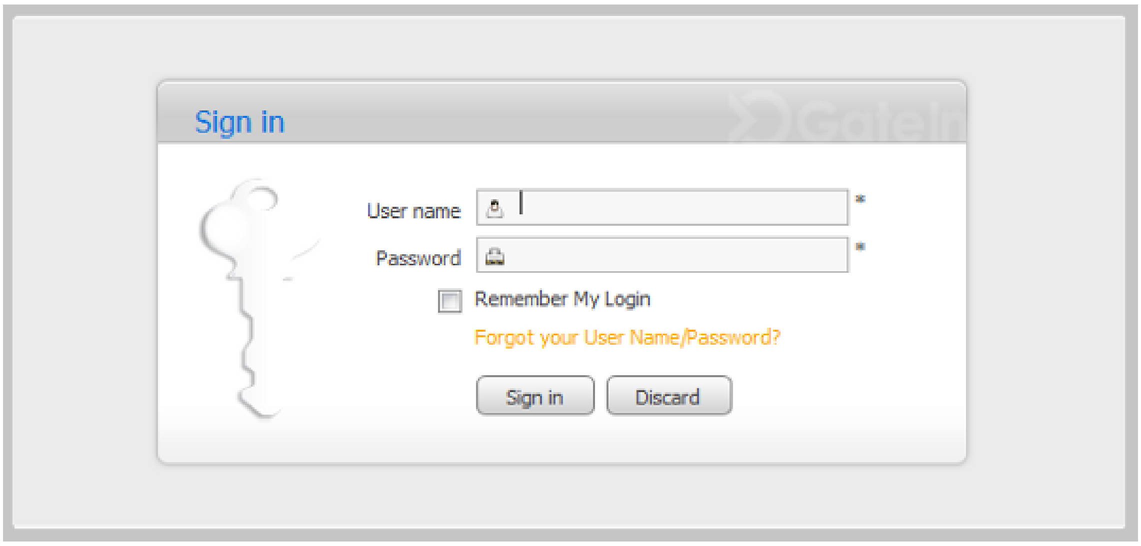
3.1.2. Sign In

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

Procedure 3.2. Sign in

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

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



3. Input your registered User name and Password.

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

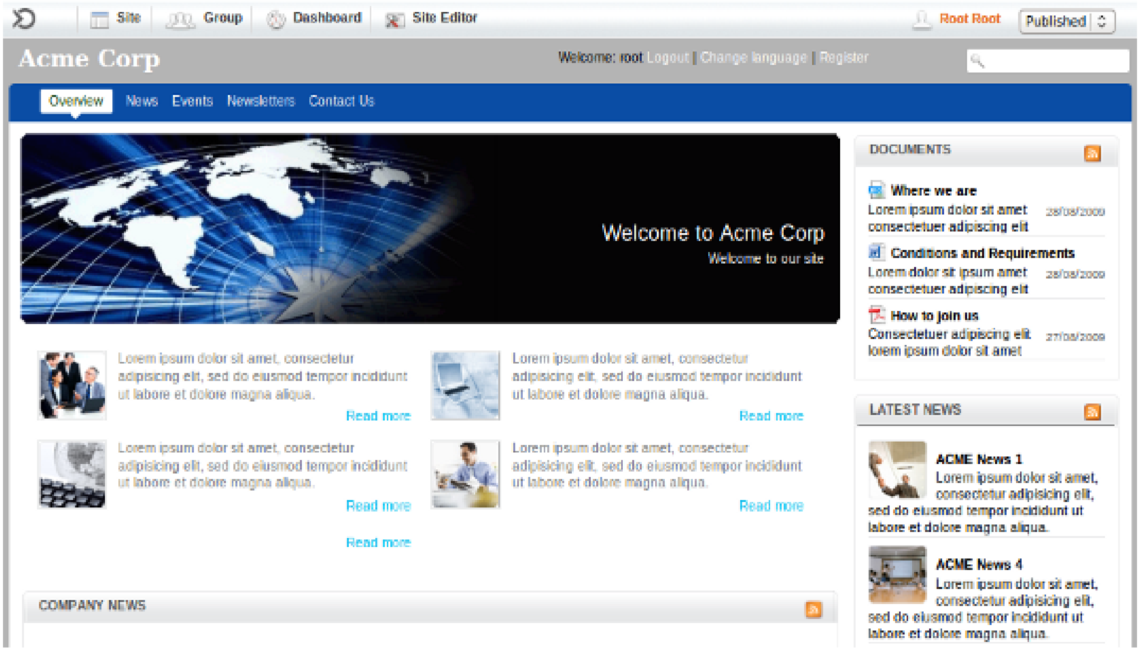
Table 3.2. Options

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

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

To login again, enter User Name and Password again.

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

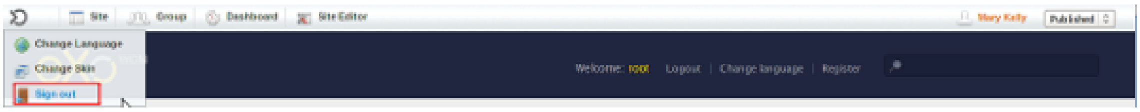


3.1.3. Sign Out

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

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

or click **Start Logo** → **Sign Out** from the menu:



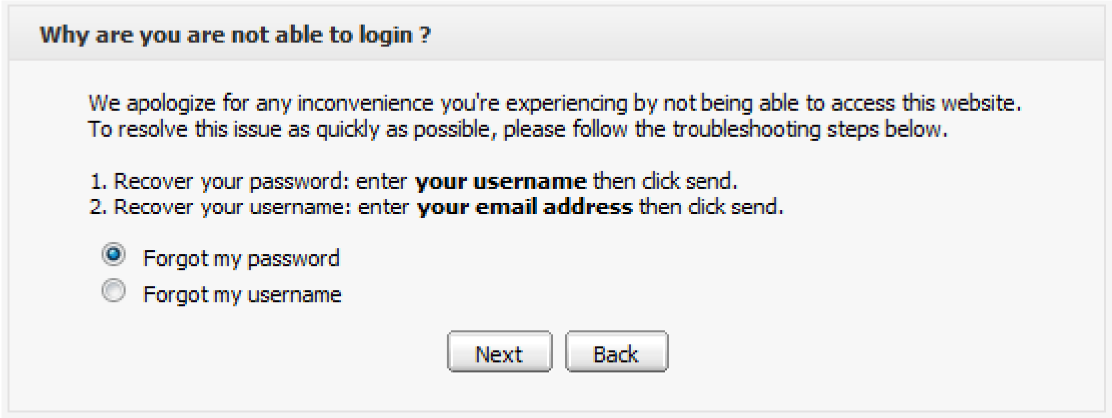
3.1.4. Retrieve user name/password

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

Procedure 3.3.

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

   This form offers two options:

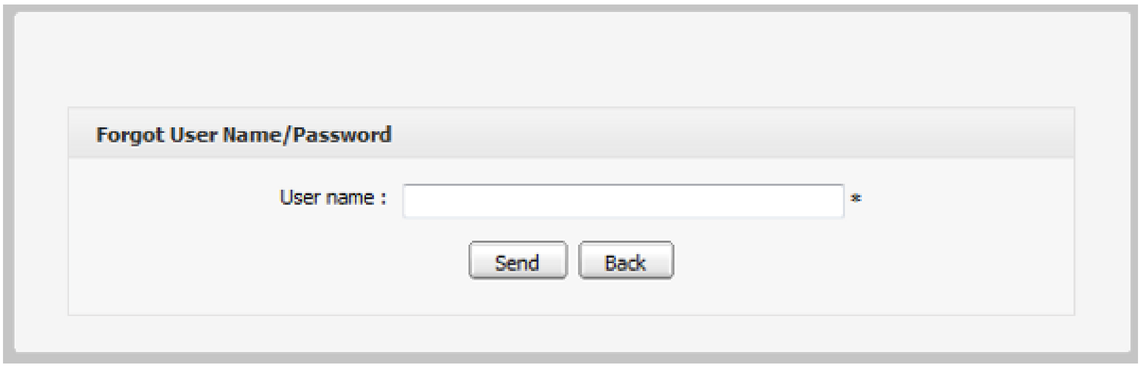


Forgot my password:
: If you forgot your password, you need to select this option.

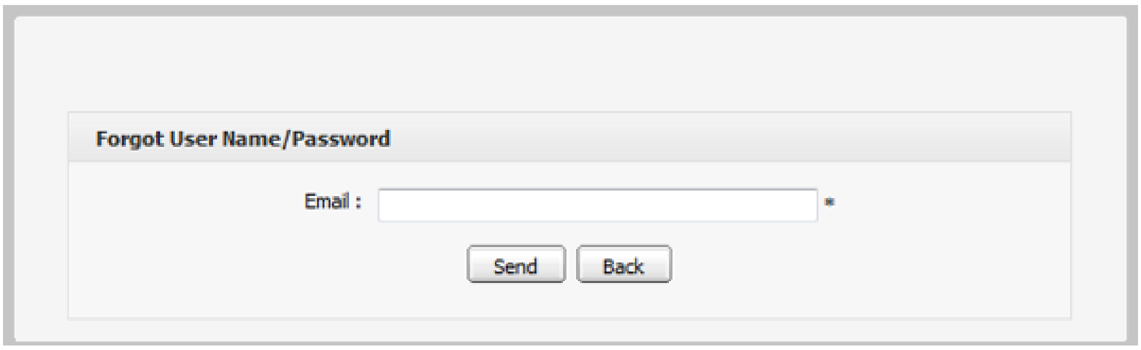
Forgot my username:
: If you forgot your username, you need to select this option.

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

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



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



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

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

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

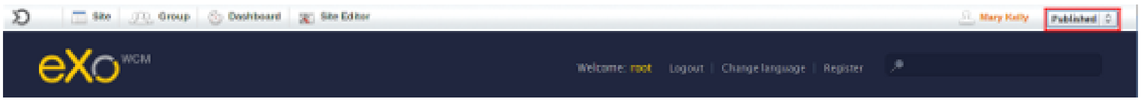
- If you forget User Name: when a username is retrieved, your old username is restored and can be reused and a new password is also sent to your email with the old username.
- If you forget old password: a new password will be set (as temporary, then you will be directed to change the password for the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

3.1.5. Change account information

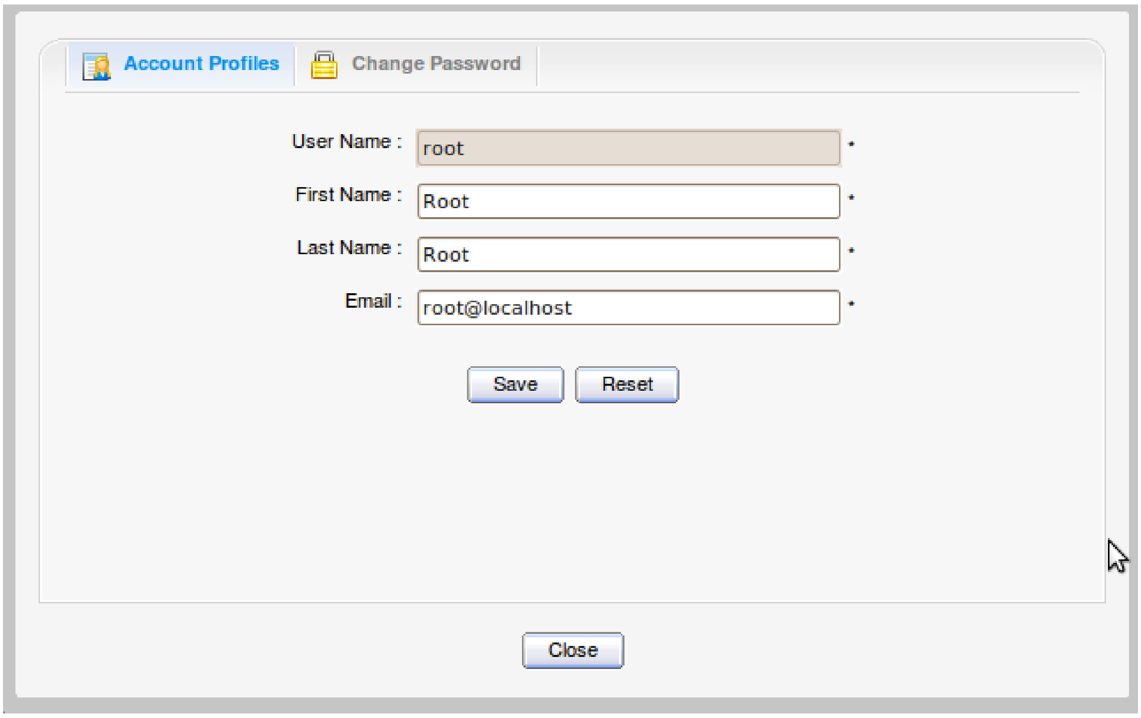
The function enables you change your account information, such as your profile and password.

Procedure 3.4.

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



The **Account Profiles** tab will appear:



Procedure 3.5. To Change Account Profiles

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

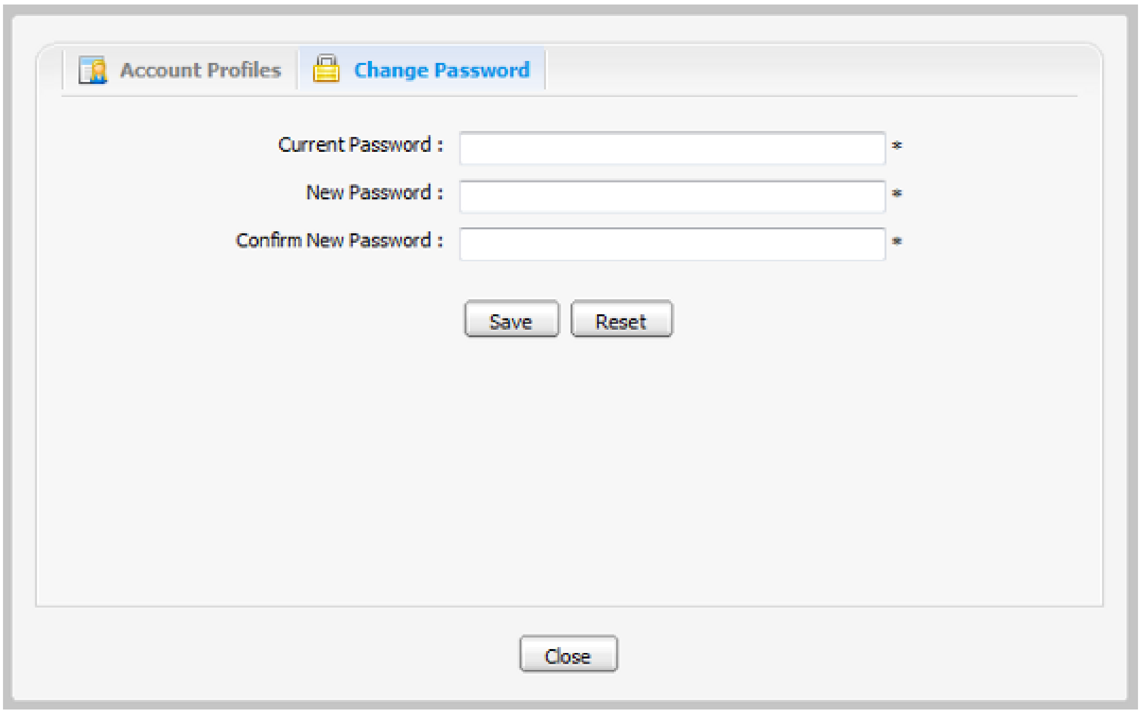
This tab displays your current basic information.

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

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

Procedure 3.6. To change your Password

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



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

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

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

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

3.2. Change the display language

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

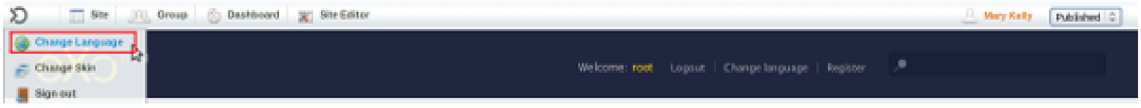
1. User's language

2. Browser's language

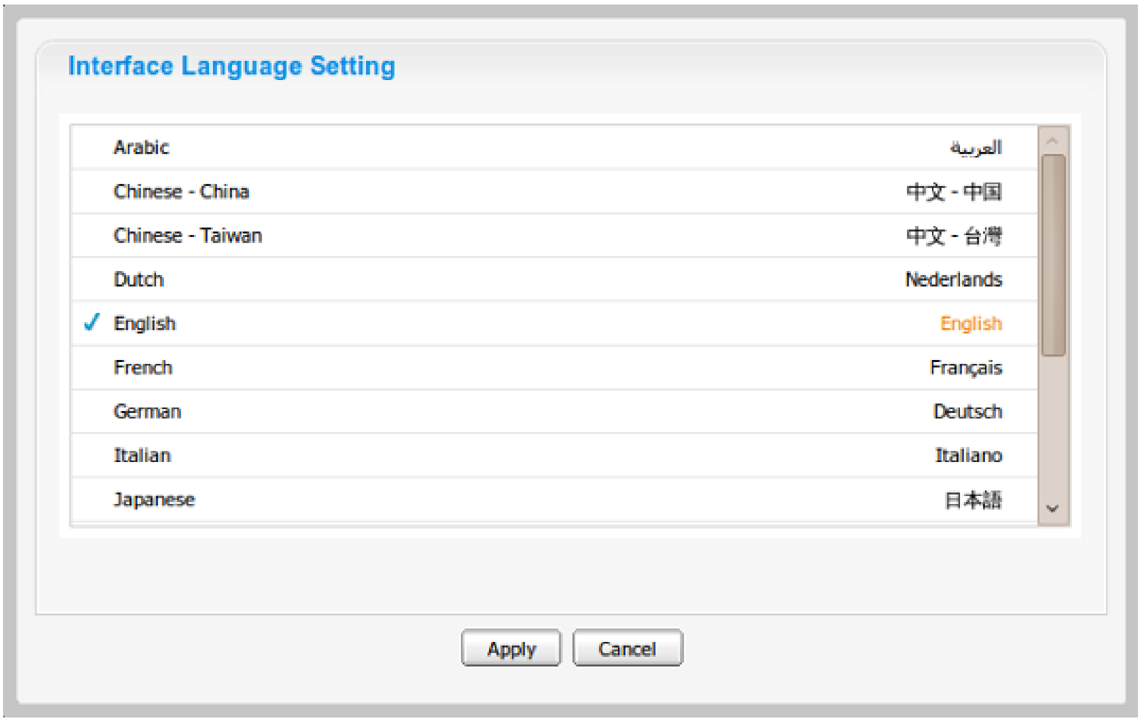
3. Portal 's language.

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

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 the another language in the list. The currently selected language will be marked with the ✓ icon.

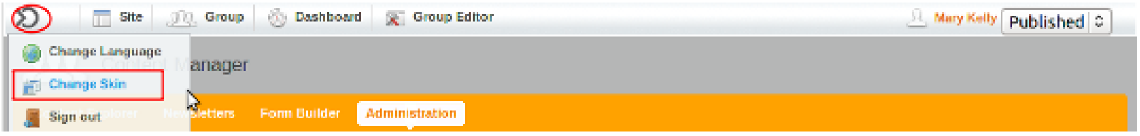
3. Click **Apply** to change the display language temporarily, and wait few seconds to take effect, or click **Cancel** to quit without any changes.

3.3. Change the skin of the current site

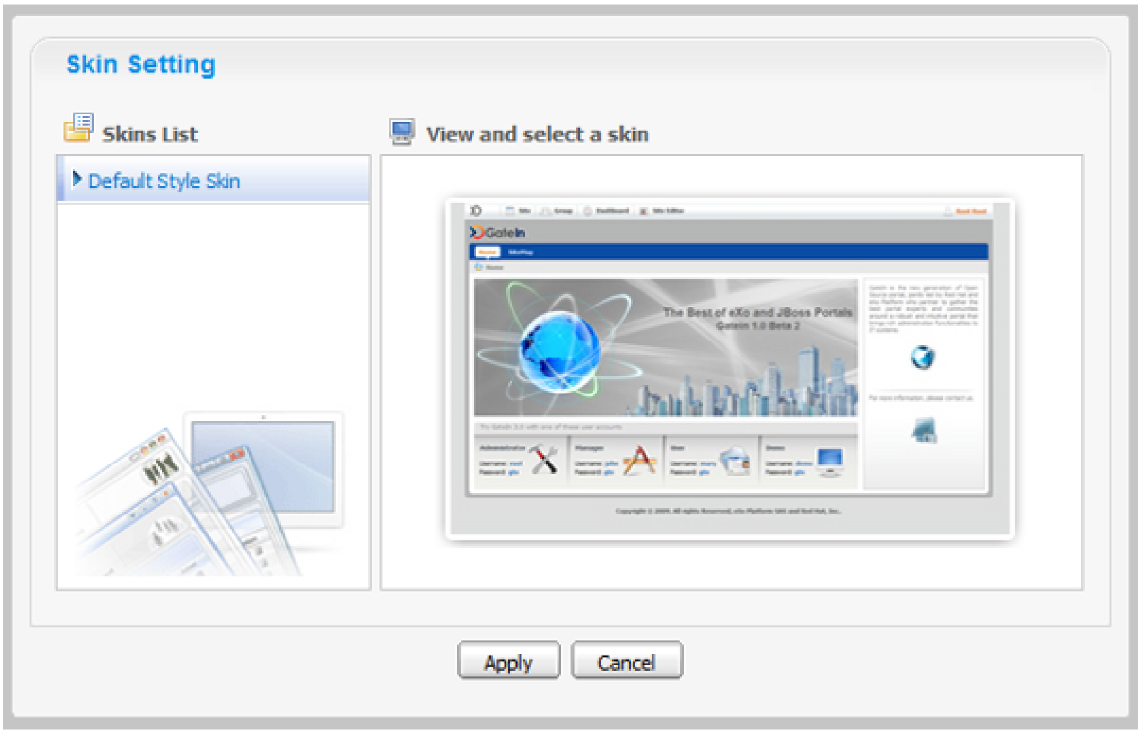
The eXo skins are attractive user interface styles for displaying a portal. Each skin has its own characteristics with different backgrounds, icons, and more. Changing the skin of the current site can make use of the portal easier and more effective.

Procedure 3.7.

1. Move the cursor to **eXo > Change Skin** item in the drop-down menu:



The **Skin Setting** form appears.



2. Select the skin you want by clicking its name.

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

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

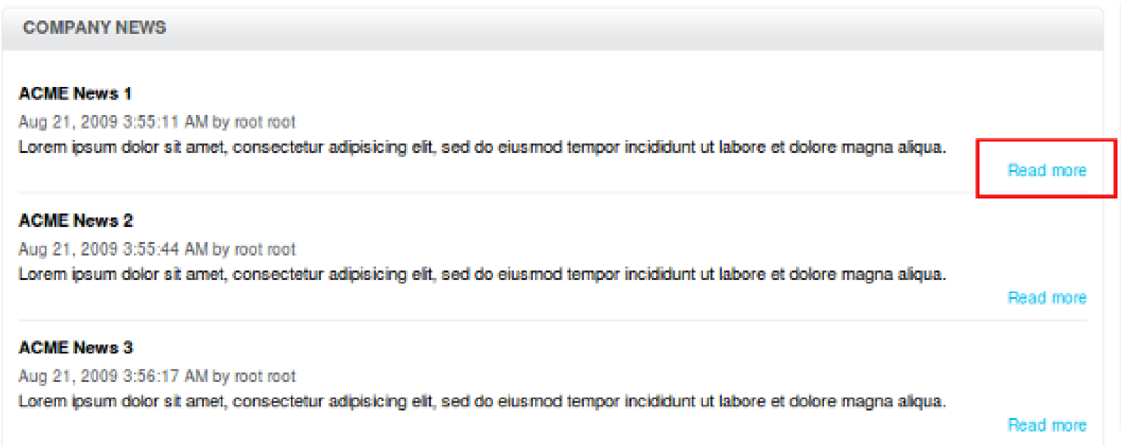
Basic Actions

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

4.1. Print content

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

1. Click **Read more** to read all the content of a document or of 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.

4.2. Manage a site

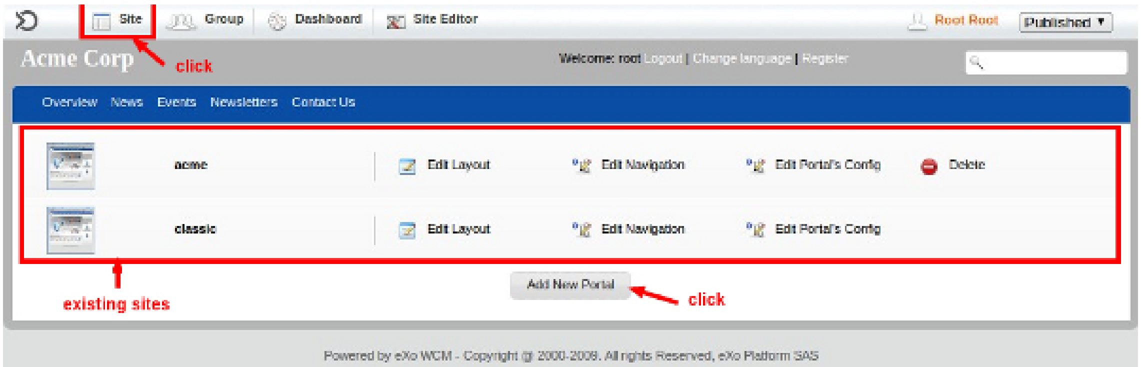
4.2.1. Create a new site

> **Note**
>
> In **eXo Platform**, only Administrators have right to create a new site.

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

Do the following:

1. Click **Site** on the **Administration** bar. A list of existing portals is listed.



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.

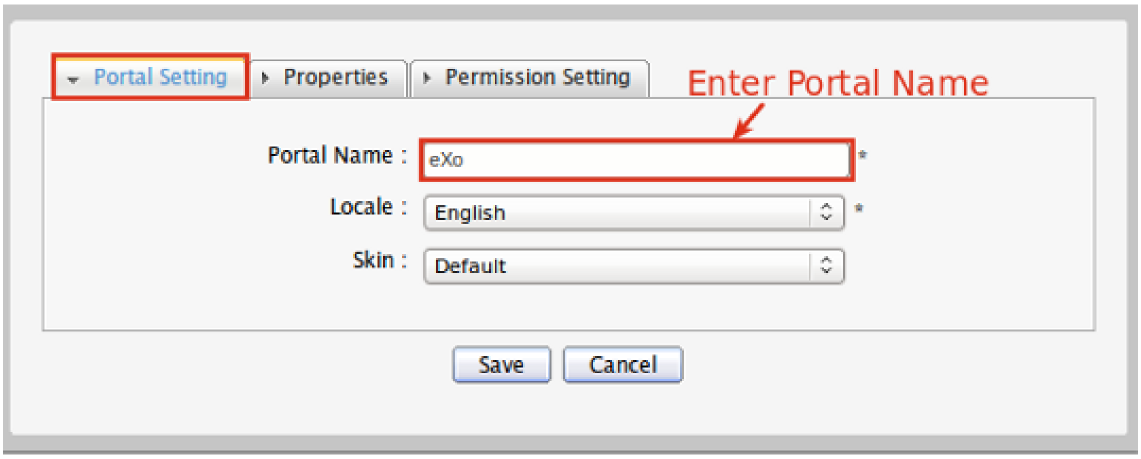


Table 4.1. Details:

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

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

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

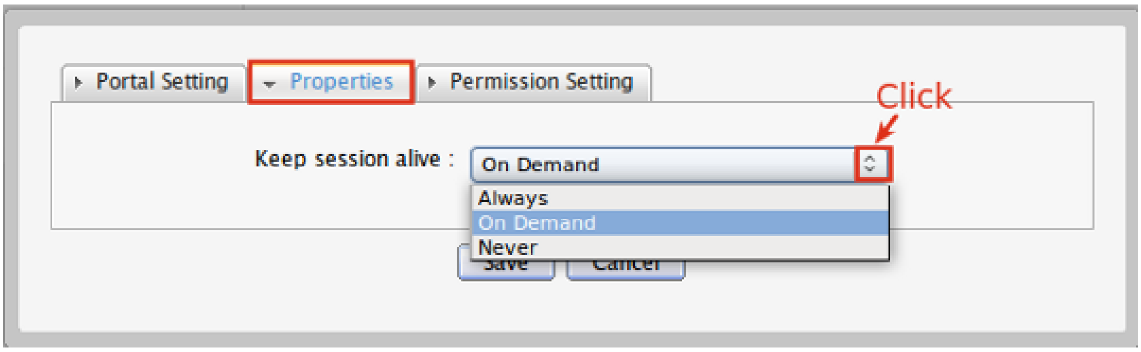
   never:
   The session never happens even if the application requests.

on demand:

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

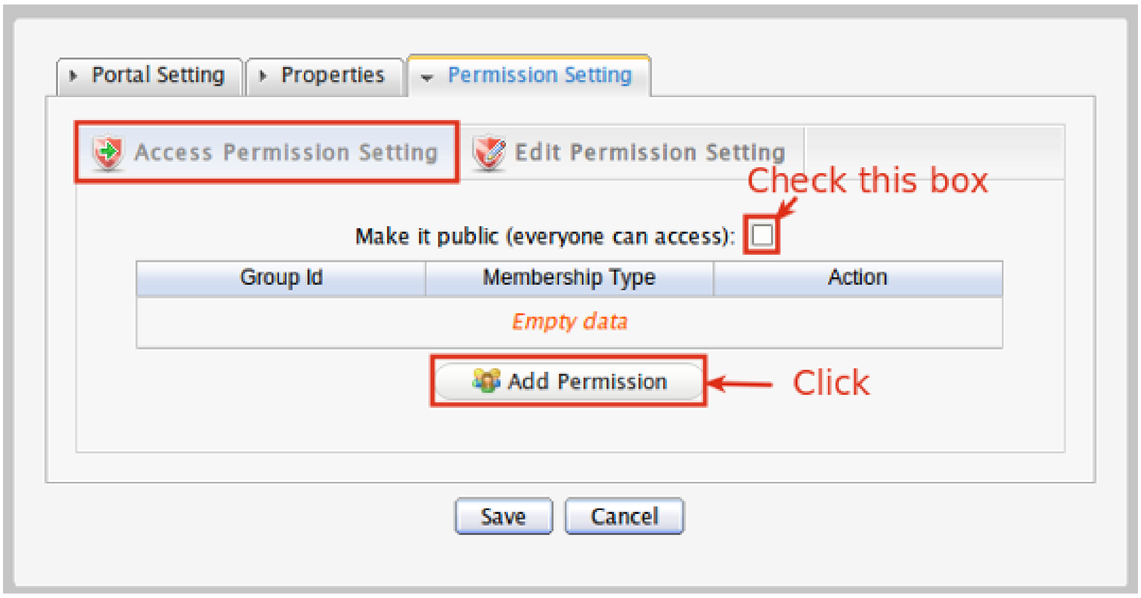
always:

The session is always enabled.



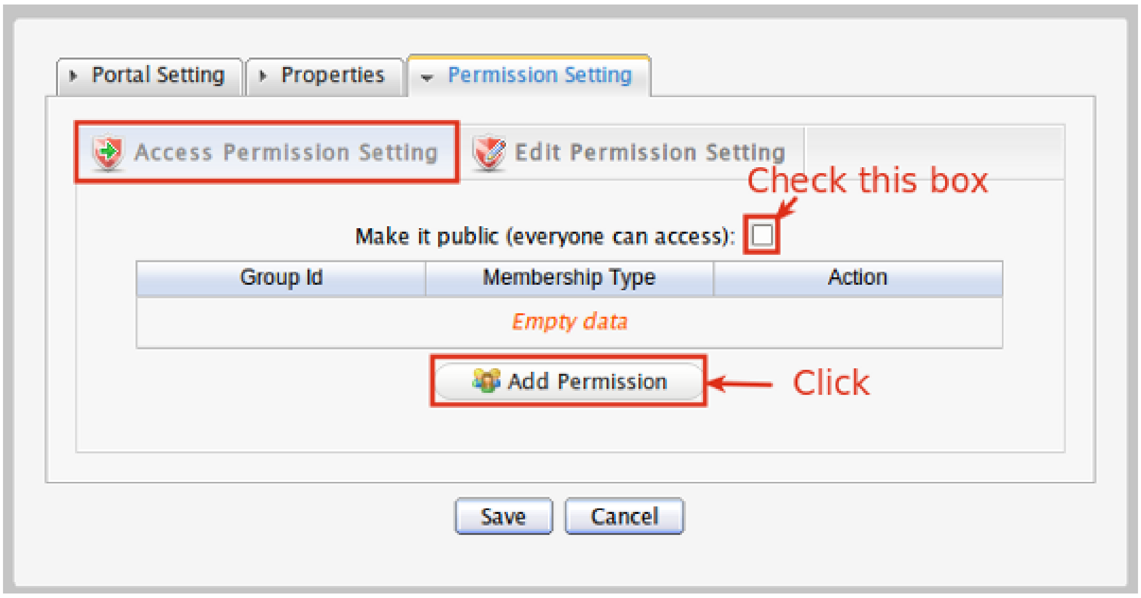
4. Select the **Permission Setting** tab to set access and edit permission for this portal.

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



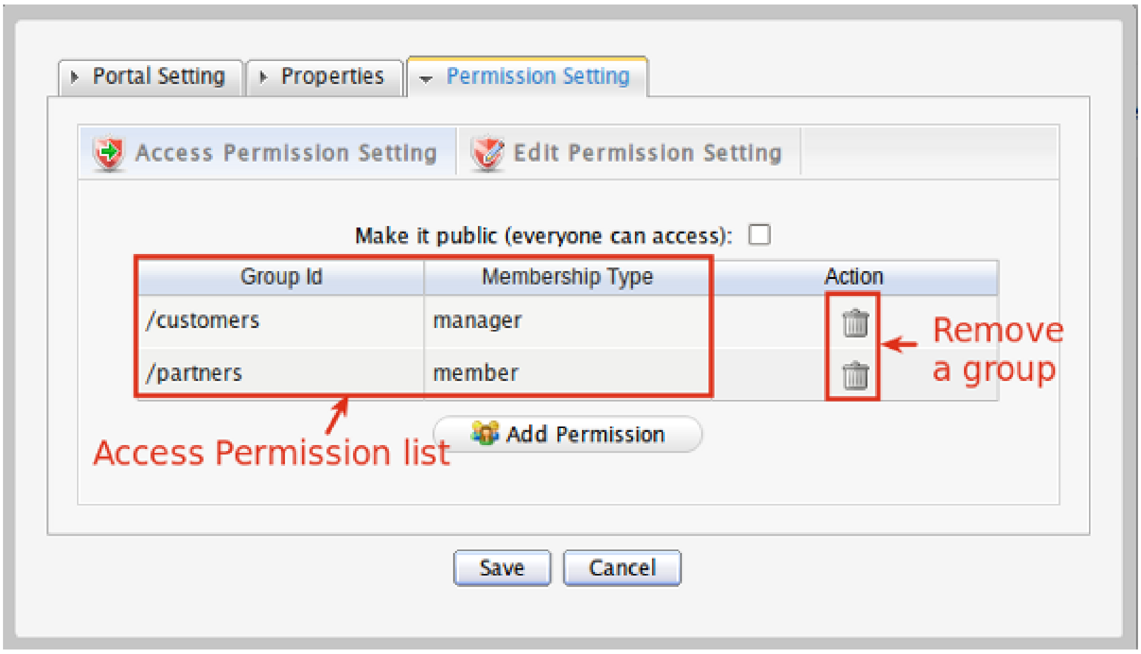
Access Permission Setting tab

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



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

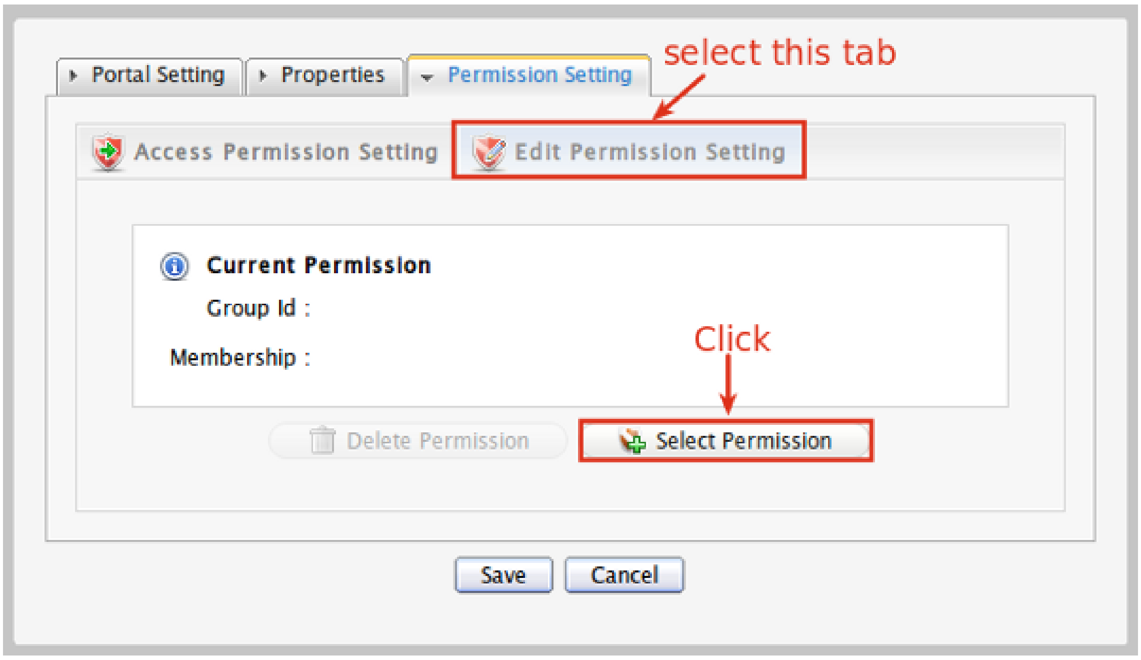
After selecting groups, the access permission list is displayed:



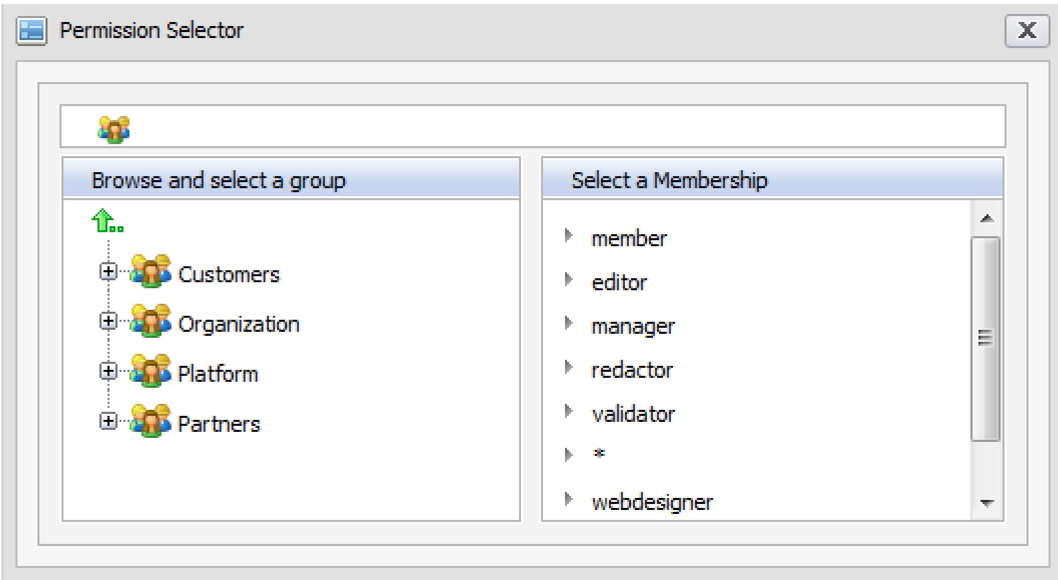
In which, the  icon is to remove its corresponding group from the Access Permission list.

Edit Permission Setting

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

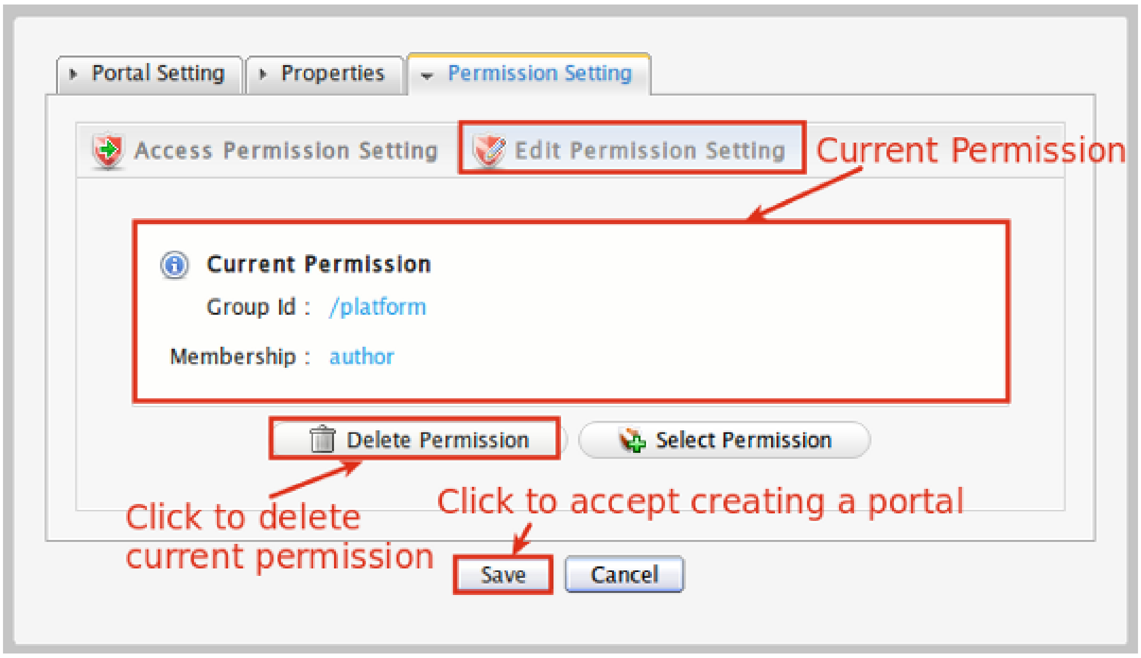


You can assign the edit permission to a group with a specific membership by clicking the **Select Permission** button in the **Edit Permission Setting** tab to open the Permission Selector form. Select a group in the left pane and a corresponding membership in the right pane.



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

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

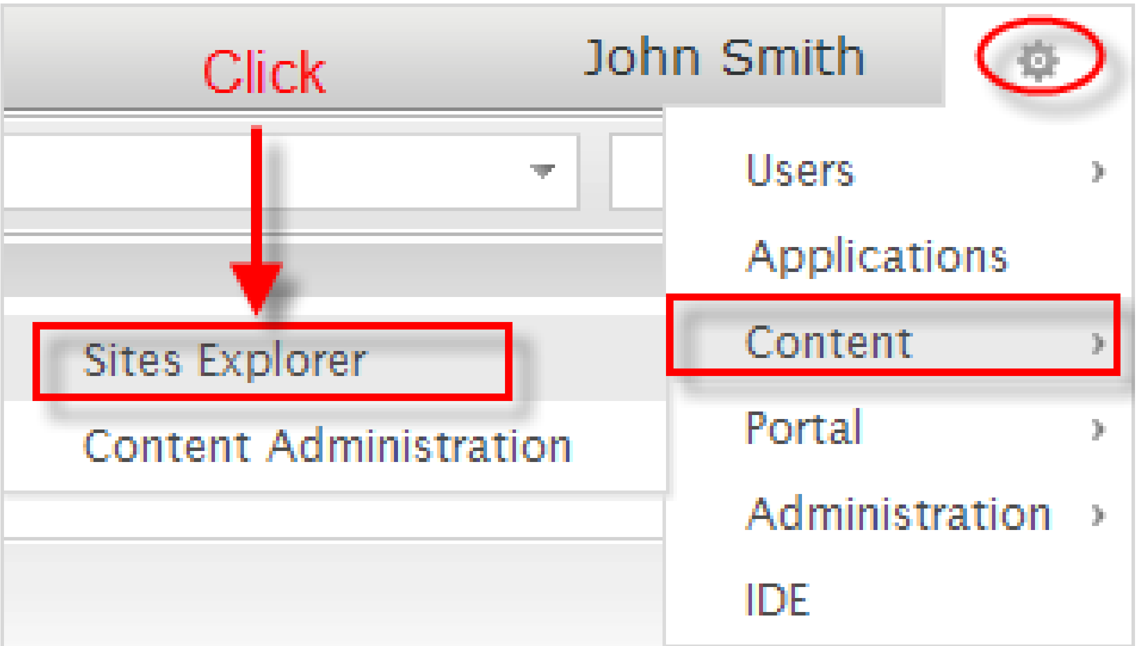


The edit permission is assigned for only one group at one time. You can click the Delete Permission button to remove the current edit permission of the selected group or re–assign the edit permission to another group by clicking the Select Permission button again and select another group.

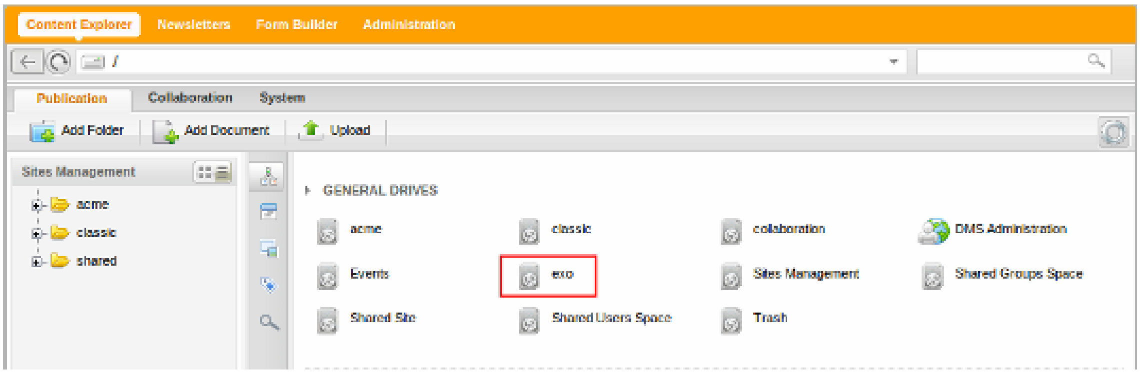
5. Click **Save** to create a new portal.

After creating a new site, a list of the existing sites will be displayed on the screen. This new site will be added to the exiting 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 **Administration** bar.



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



4.2.2. Edit a site

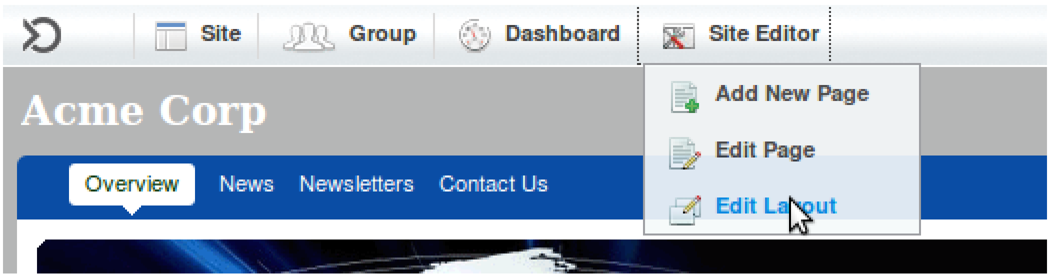
This function enables you to edit a site, including the configuration (setting, permission), the navigation and the layout components of the site.

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

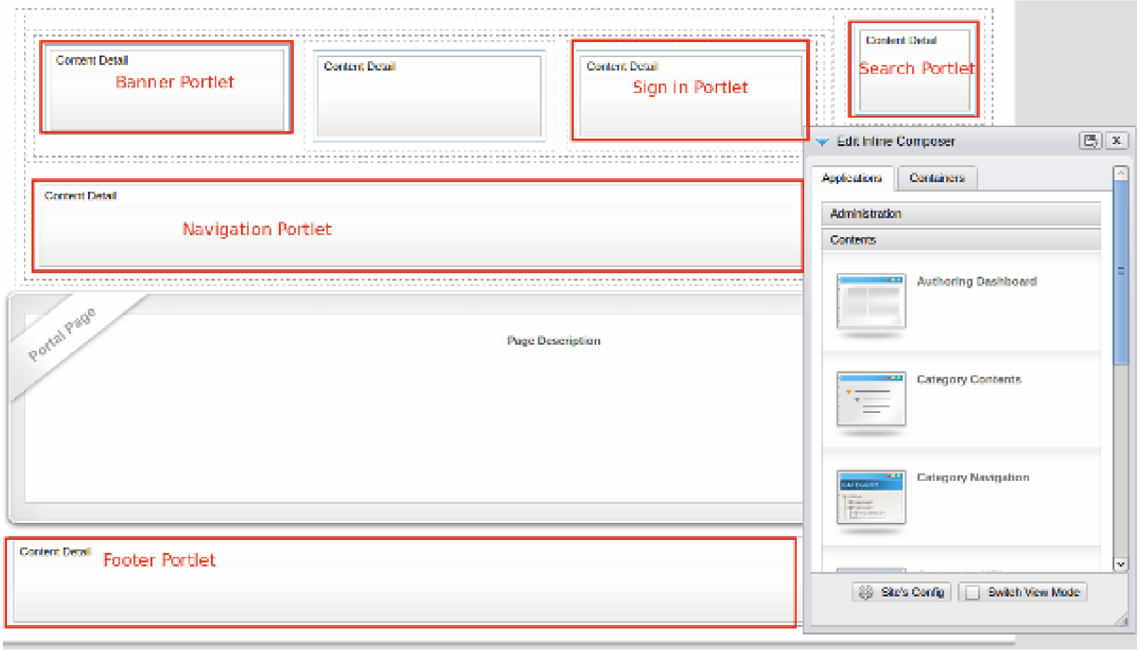
- The first way: Edit the site that you are browsing by accessing to **Site Editor**.
- The second way: Edit the site by accessing to **Sites.**

4.2.2.1. By accessing to Site Editor

Directly edit the site you are browsing by going to **Site Editor > Edit Layout**



The form to edit the site appears.



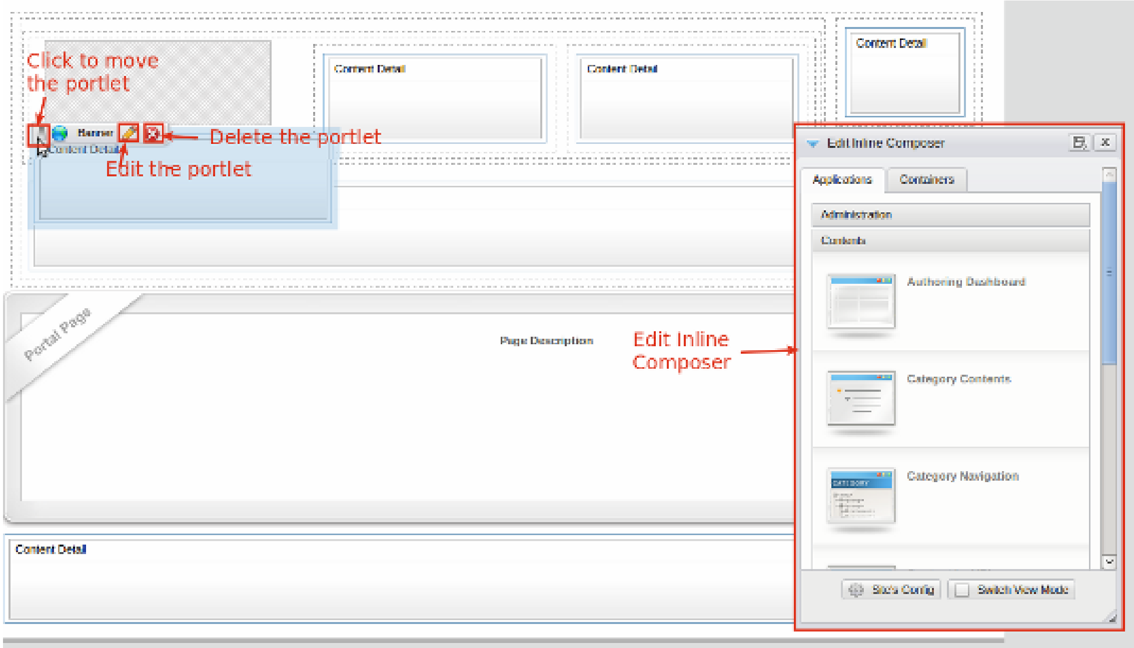
Details:

Table 4.2.

Indicator	Meaning
	**Site's config**: allows editing the site's configuration.
	**Switch View Mode**: shows how the current layout looks like with real content.
	**Finish**: allows saving all changes and escaping the Edit page
	**Abort**: allows canceling all changes that have not been saved and quitting the Edit page

With this way, you can only edit the layout and the configuration of site.

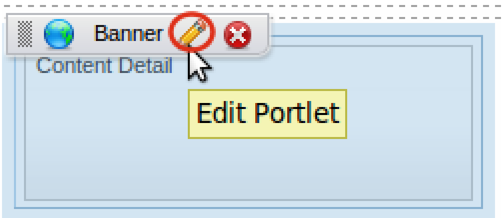
Edit layout. Editing the layout means editing a banner, a navigation bar, a breadcrumb bar, a homepage and a footer of a website. You can also add more portlets to the site by dragging and dropping from the **Applications t**ab of the **Edit Inline Composer form** to the main pane. Moreover, you can move a portlet from a location to another location.



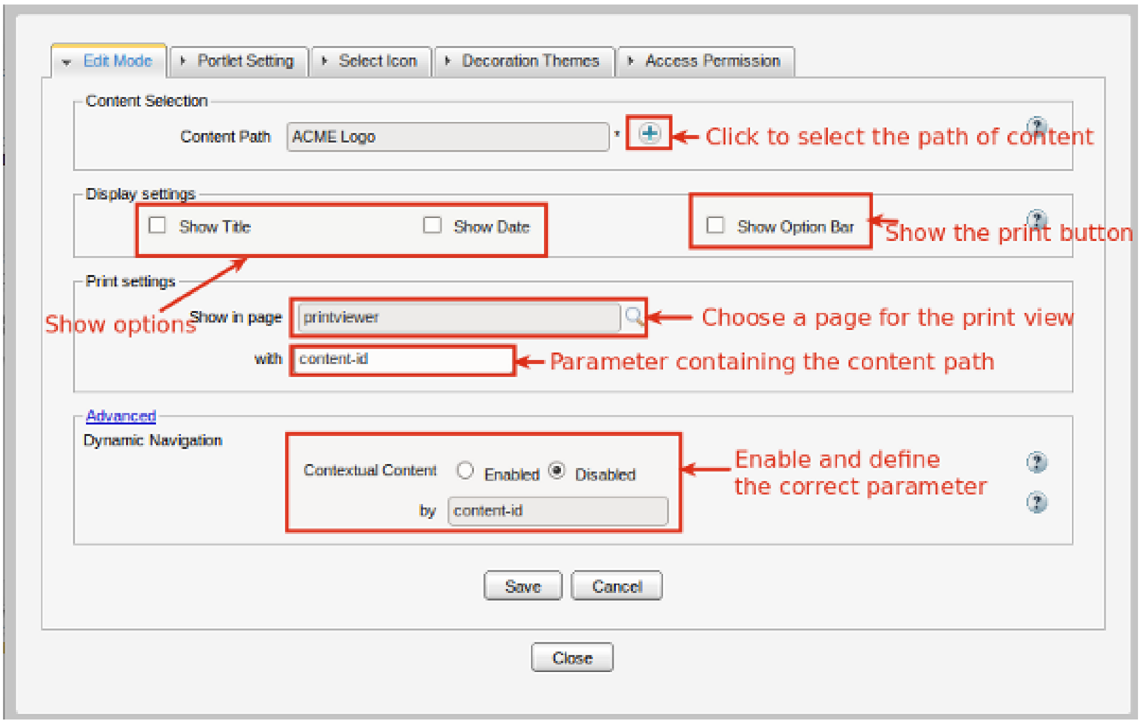
Editing the banner portlet is similar to editing the Sign-in portlet and the footer portlet so in this guide, we only show how to edit the banner of the site as an example of editing the layout.

Edit Banner

1. Show the form to edit a banner by clicking the  icon of the banner portlet in the Edit Portal form like the illustration below.



A form to edit the current banner will appear.



2. Select **Edit Mode** tab:

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

   Display Settings:

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

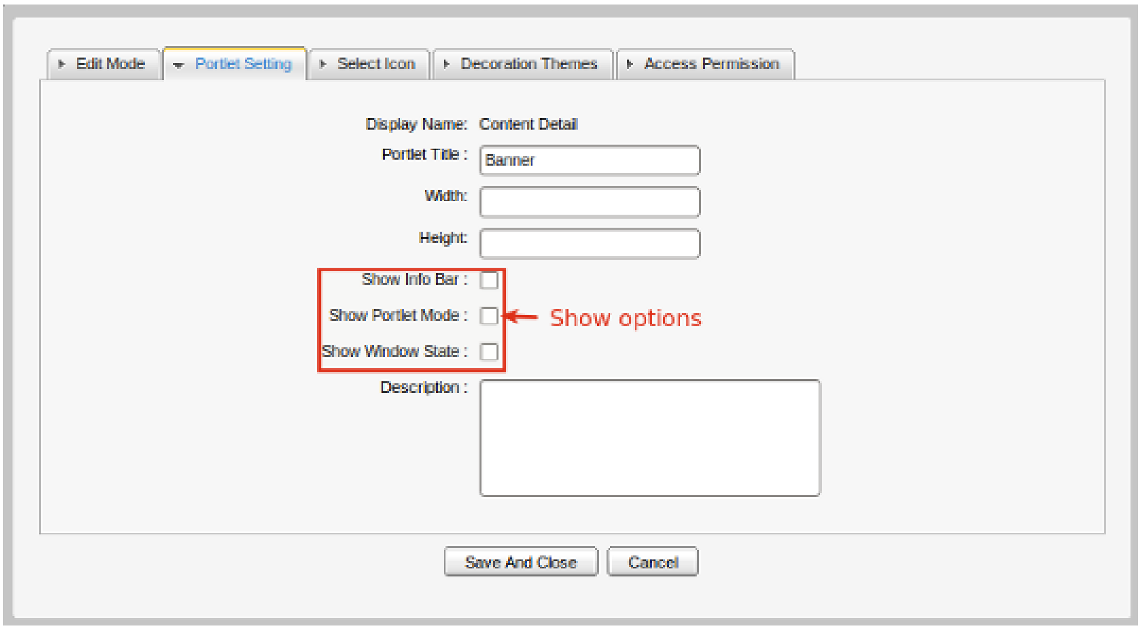
   Print Setting:

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

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

   > **Note**
   >
   > Click the icon to see more explanation for each section.

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



Details:

Table 4.3.

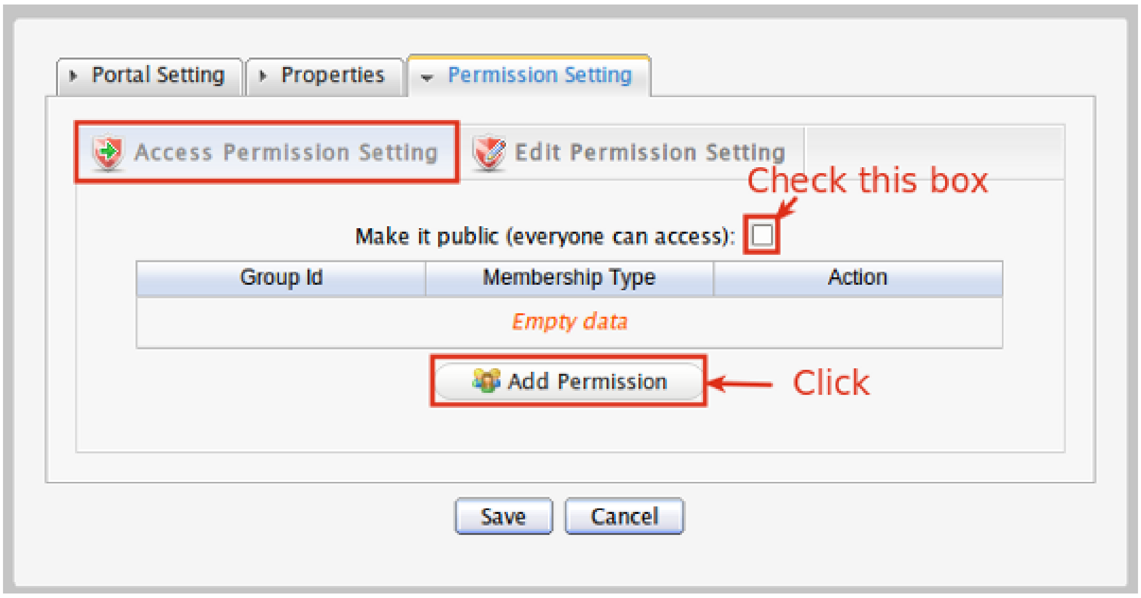
Display name	The display name of the portlet. You cannot change it.
Portlet Title	The title of the portlet. You can change it.
Width	The width of the portlet.
Height	The height of the portlet.
Show info bar	Tick the check box if you want to show the info bar of the portlet.
Show Portlet mode	Tick the 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. Select **Icon** tab: Select an icon for the portlet by clicking it.

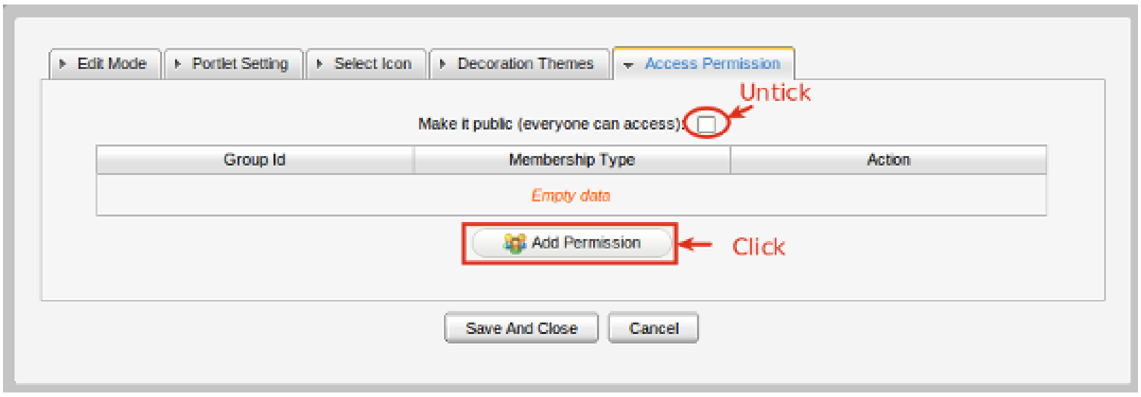
5. Select **Decoration Theme** tab: Select a decoration theme for the portlet.

6. Select **Access Permission** tab:

   By default, all users can access the portlet:



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



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

> **Note**
>
> The asterisk (*) in the right pane means 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.

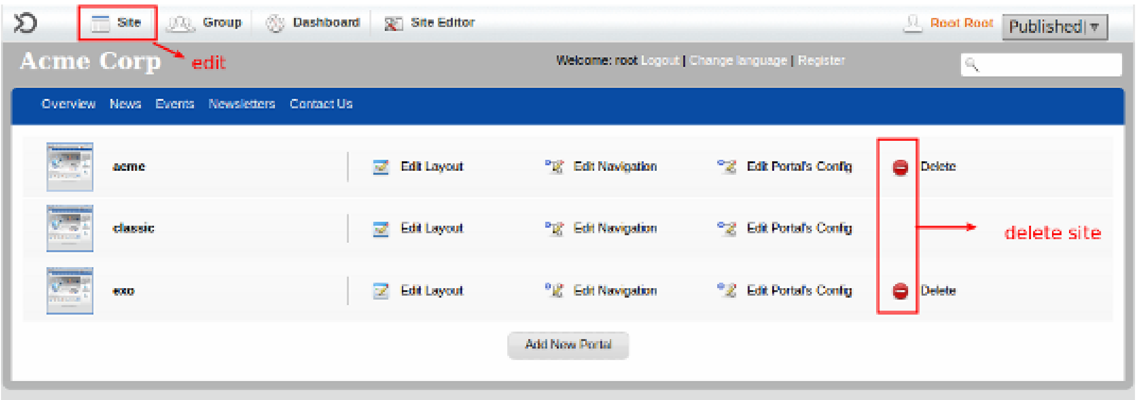
Edit Configuration. To edit the configuration (including language, skin and permissions) of the site, click the  button to open the same form as the form to add a new portal.

Do the same steps as in *Section 4.2.1, "Create a new site"*.

> **Note**
>
> You cannot change the name of the site.

4.2.2.2. By accessing to Site

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

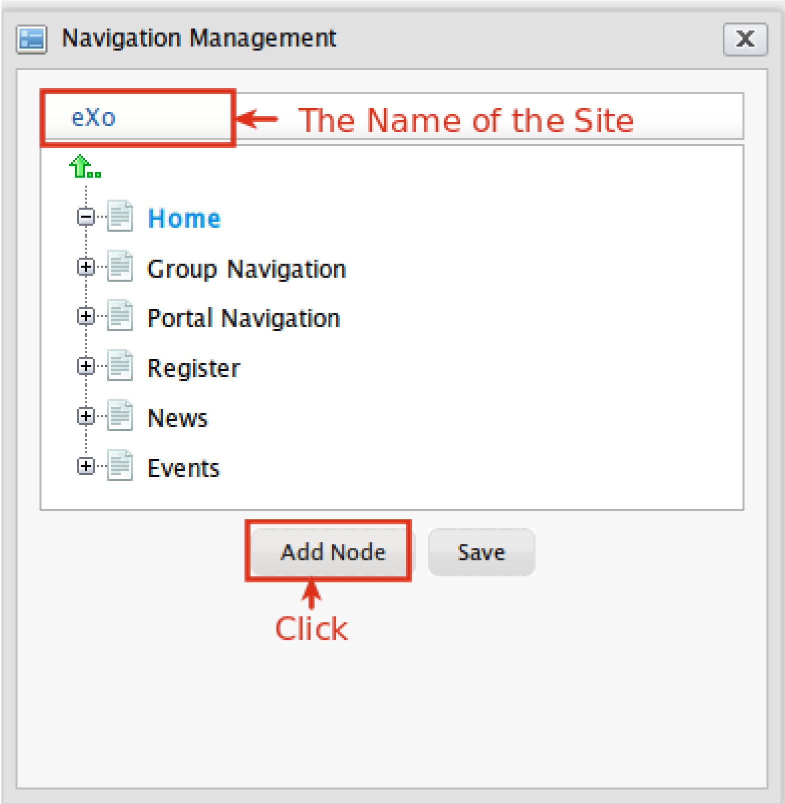


Edit Layout. Do the following to edit the layout of an existing site.

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

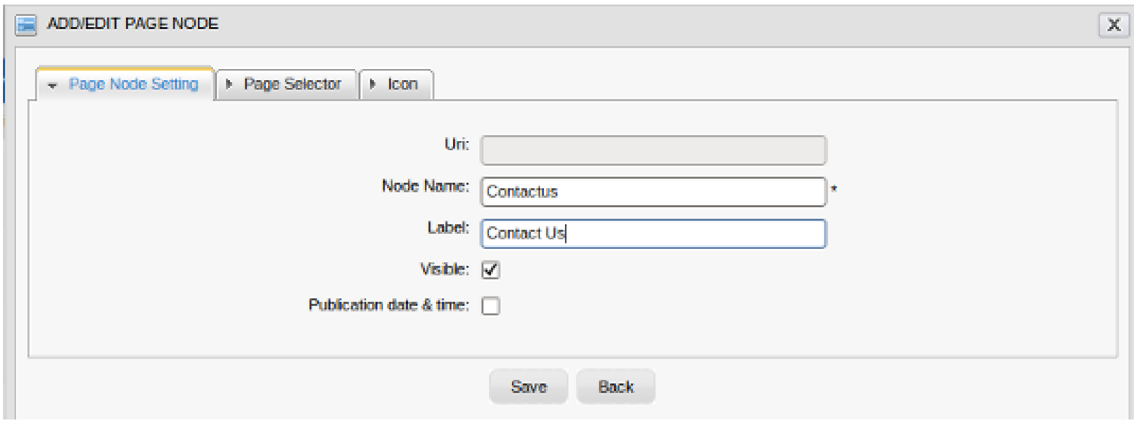
Edit Navigation. Do the following to edit the navigation of a site.

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



2. Click **Add Node** to open the **ADD/EDIT PAGE NODE** form. (For more details, refer to the Section 5.3.1, Add a new node, GateIn User Guide 3.1.)

3. In the **Page Node Setting** tab, enter a name for the node. It is required.



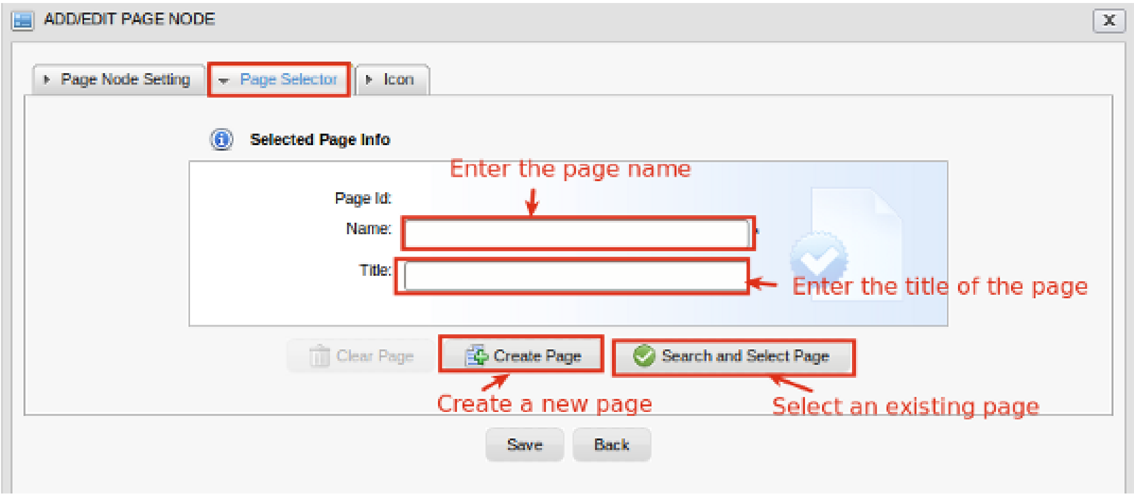
Details:

Table 4.4.

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

Label:	The node's display name on the screen. This field may be changed and its length must be between 3 and 60 characters.
Visible:	This checkbox allows the page and its node to be shown or hidden 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:



Details:

Table 4.5.

Page Id:	The identification string of the page. It is created automatically when the page is created.
Name:	The selected page's name.
Title:	The selected page's title.
Clear Page:	To remove the input page information in the fields
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. It is not required.
6. Click **Save** to create a node for the navigation.

Note

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

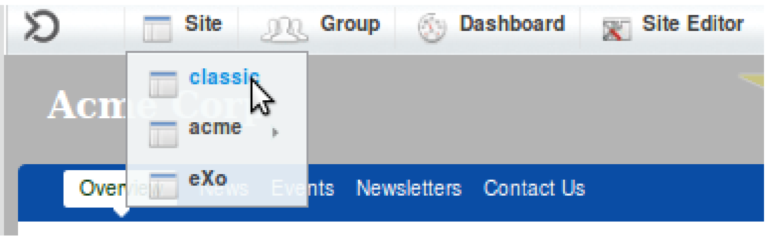
Edit Configuration. The portal's configuration including language, skin and permissions can be edited by doing the following:

1. Click **Site --> Edit Portal's Config** to open the same form as the form to create a site.
2. Do the same steps as in *Section 4.2.1, "Create a new site"*.

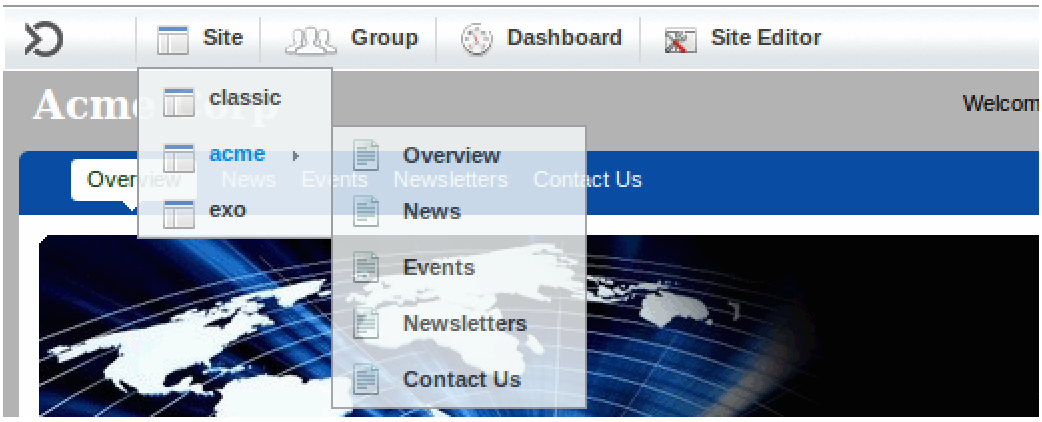
4.2.3. Switch between sites

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

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



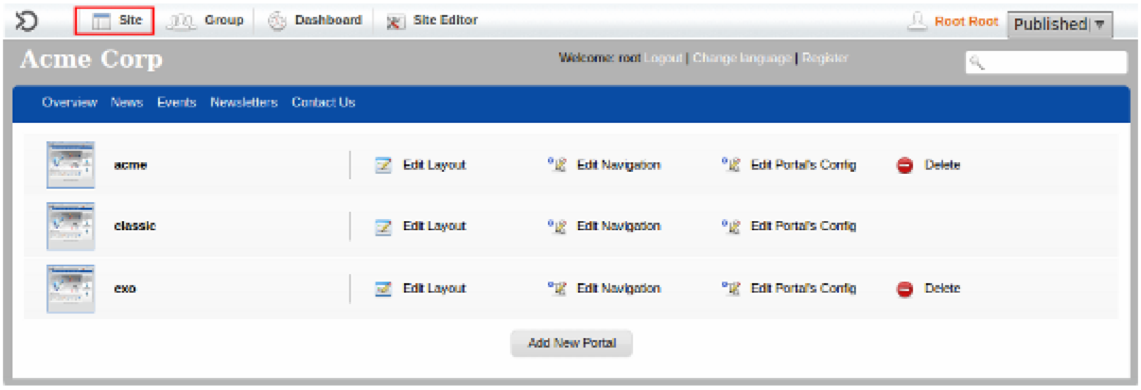
Your current site will be switched to the selected site, and you will see all the child pages that displays on the Navigation bar of the selected site.

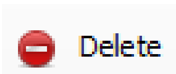


4.2.4. Delete a site

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

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



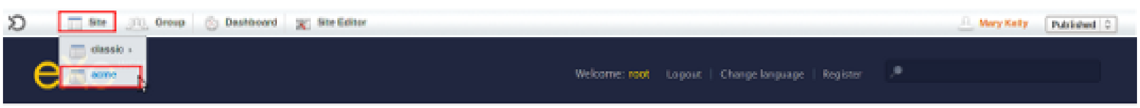
2. Click the  button in the row of the portal that you want to delete.

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

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

4.2.5. View a site

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



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

1. Administration bar which contains administration functions related to portals (websites).
2. Banner which contains slogan, logo, icon used in the website.
3. Navigation bar which helps users to visualize the structure of the website and provide quick links to different pages.
4. Home page which is the main page of the website. This is the default page that is displayed first when you visit the website.
5. Footer of the website. It can be texts, or image that is displayed at the bottom of the website. It provides information about author/institutional sponsor, revision date, copyright and more.

4.2.6. Search content in a site

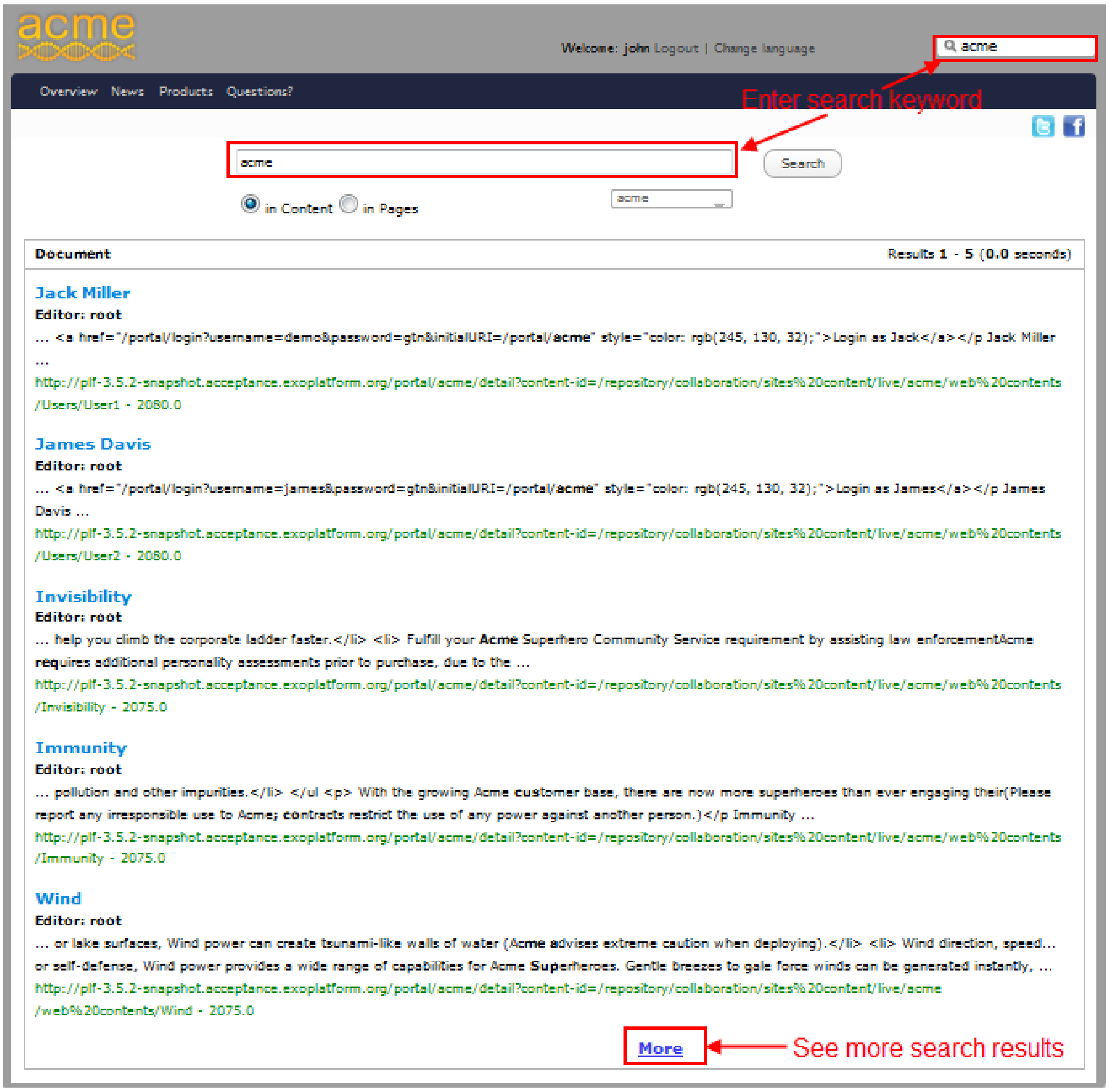
The **Search** function allows you to quickly search for any content in the system with a keyword from the front page, even if you do not log in. However, the number of the search results displayed depends on your role.

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

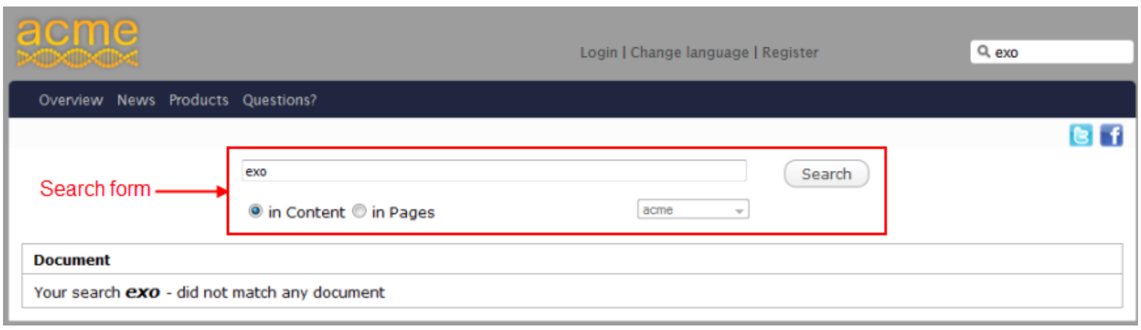
4.2.6.1. Search for content

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:

Table 4.6.

Field	Details
in Content	Search all **published content** of search index areas that contain the keyword.
in Pages	Search all *SEO data [175]* (description, keyword) and pages that have **titles** or **names** matching the keyword.

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

3. Press **Enter**, or click **Search** to start searching.

4.2.6.2. Edit the Search portlet

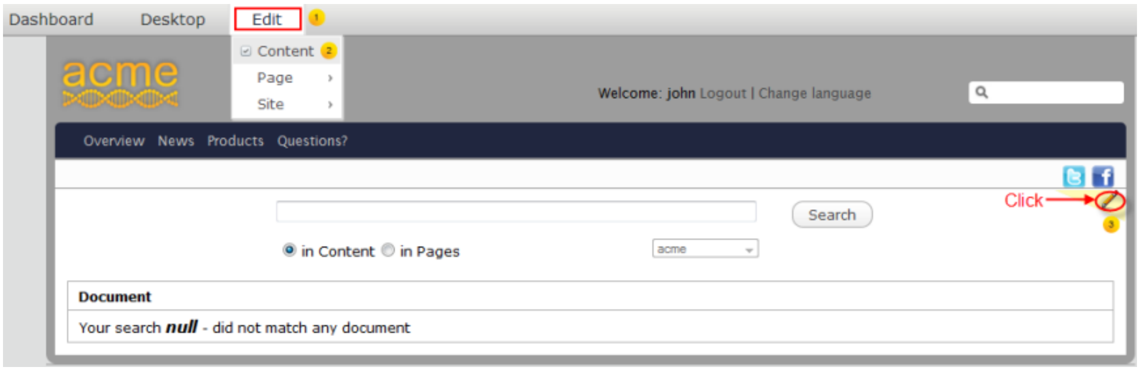
Editing the Search portlet allows you to change the display of search results.

1. Open the Search page as in *Section 4.2.6.1, “Search for content”*.

2. Open the **Edit Mode** of the **Search** portlet by following one of two ways:

- **The first way**

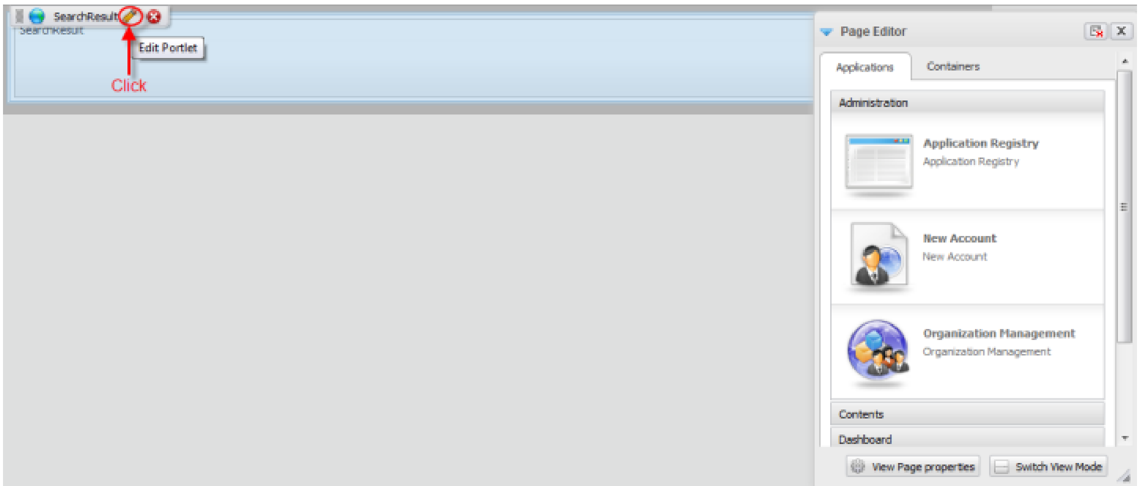
  Hover your cursor over **Edit --> Content** on the **Administration** bar, and then click .



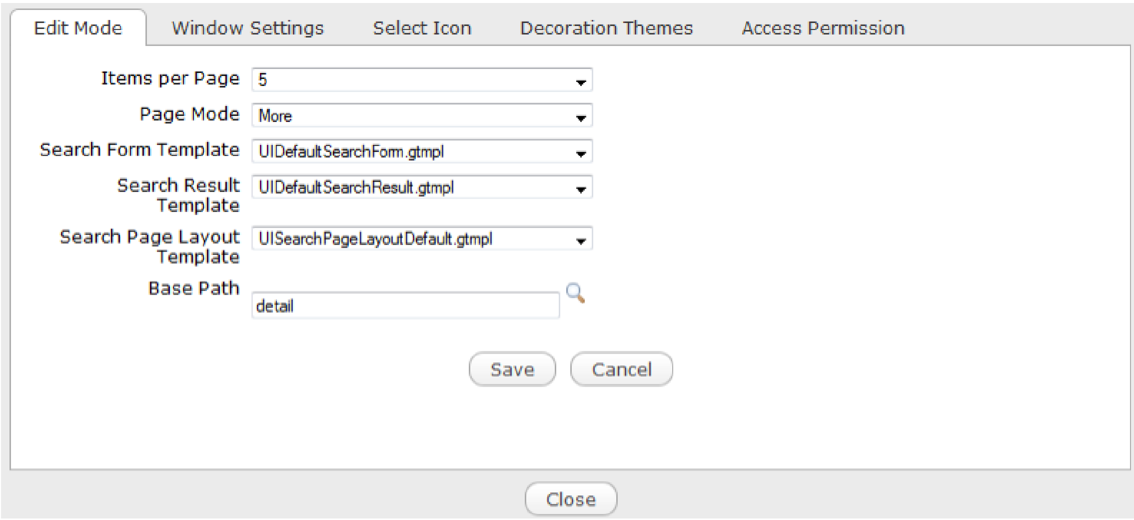
- **The second way**

  Hover your cursor over **Edit --> Page --> Layout** on the **Administration** bar. The **Page Editor** will be displayed.

  - Hover your cursor over the **SearchResult** portlet and click to edit the portlet.



The **Edit Mode** of the **Search** portlet appears.



Details:

Table 4.7.

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.

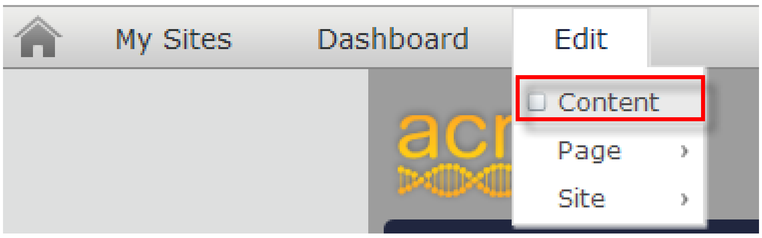
4.3. Contribute content

4.3.1. Edit mode

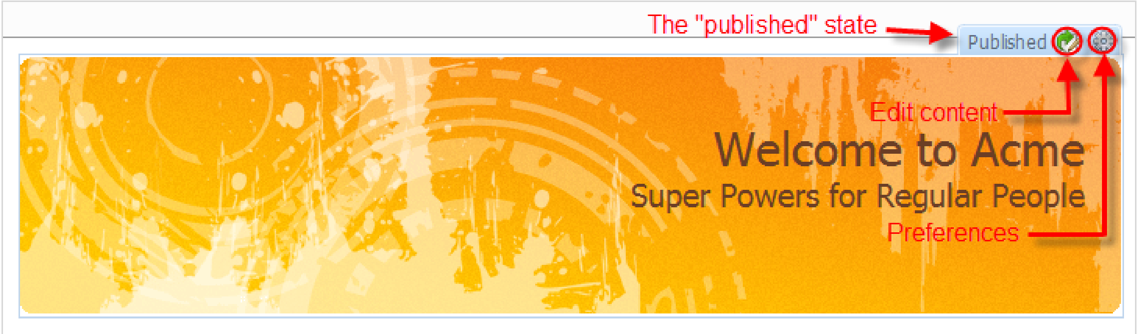
When you access a site, by default, the site content is in the published mode and you cannot edit them.

However, each site in eXo Platform has the **Edit** mode which enables you to edit all content of the current site. When hovering your cursor over content, you can see the Edit icon which enables you to quickly edit this content. You can take advantage of this feature to submit content to a page.

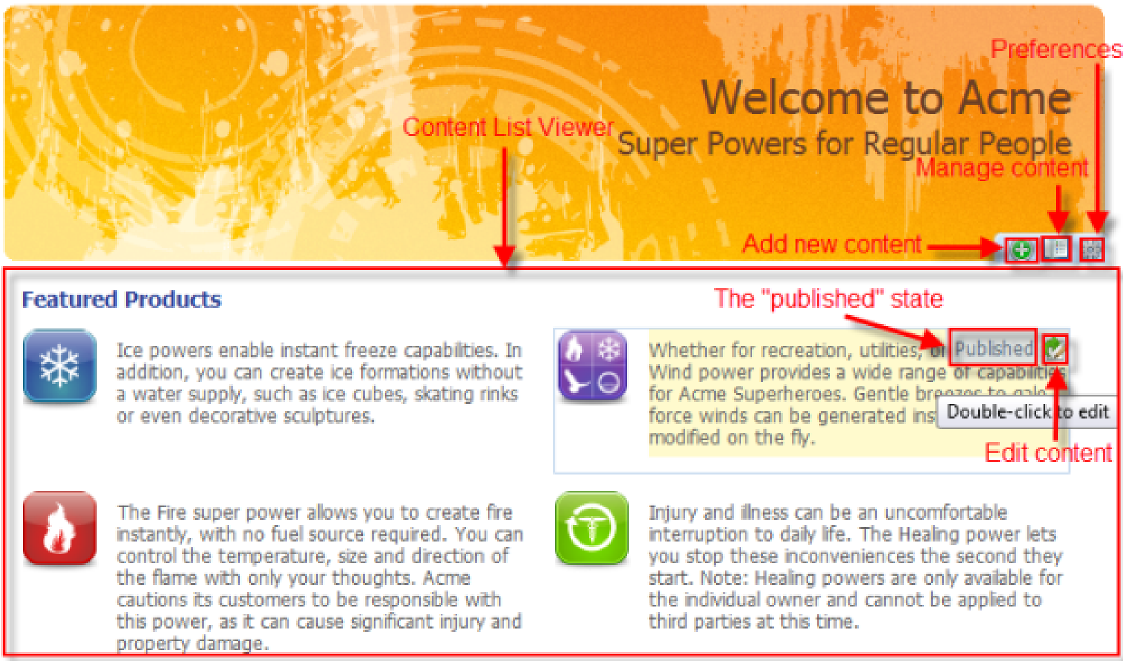
To turn on the **Edit** mode, hover your cursor over **Edit** on the **Administration** bar, then select **Content** from the drop-down menu.



For Single Content Viewer (SCV), you can see the current state of the content, the Edit Content icon and Preferences icon.



For Content List Viewer (CLV), you can see the current state of the content, the Edit Content icon, the Preferences icon, the Add Content icon and the Manage Content icon.



4.3.2. InContext Editing

By using the **InContext Editing** feature, the process of editing a page becomes more intuitive. This feature allows you to edit content "in context" without using the WYSIWYG editor, and the new content will automatically override old one.

To use **InContext Editing**, you first need to turn on the **Edit Mode**.

Here, you can do the following specific actions:

- *Add content*
- *Edit content*
- *Manage content*
- *Manage preferences*

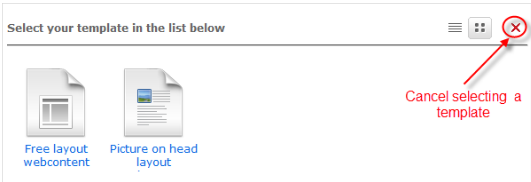
4.3.2.1. Add content

Adding new content by using **InContext Editing** is enabled for the **Content List Viewer** (CLV).

1. Turn on the **Edit Mode**, then hover your cursor over the CLV to which you want to add new content.

2. Click  on the CLV.

   You will be directed to the **Sites Explorer** with a list of content templates for you to select.



Details:

Table 4.8.

Field	Description
Free layout web content	This template is a free layout.
Picture on head layout web content	The site's content is presented in two spaces. One is for inserting an image and the other for editing the site's content. The image will be put at the head of a site.
	Display the list of the content templates in the List view.
	Display the list of the content templates in the Thumbnail view.
	Cancel selecting the content template and back to the previous page.

3. Click one template for your content. Each template has an Info bar on the top of the template.

Details:

Table 4.9.

Field	Description
Change Content Type	Select another content types.

Field	Description
Save	Save the content without closing the content form.
Save & Close	Save the content and close the content form.
Close	Close the content form without saving the content.
	Switch on/off the full-screen mode.

4. Fill all the fields in the form. See the *Add a document* section to know how to create the different content types.

5. Click **Save** or **Save & Close** to save the document.

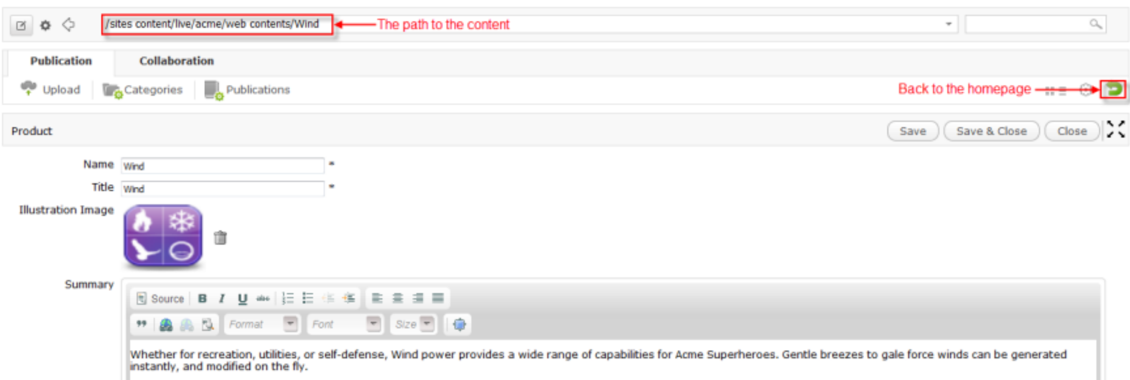
> **Note**
>
> The folder, where a document is saved, is the path you have selected in the *Manage preferences* section.

4.3.2.2. Edit content

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

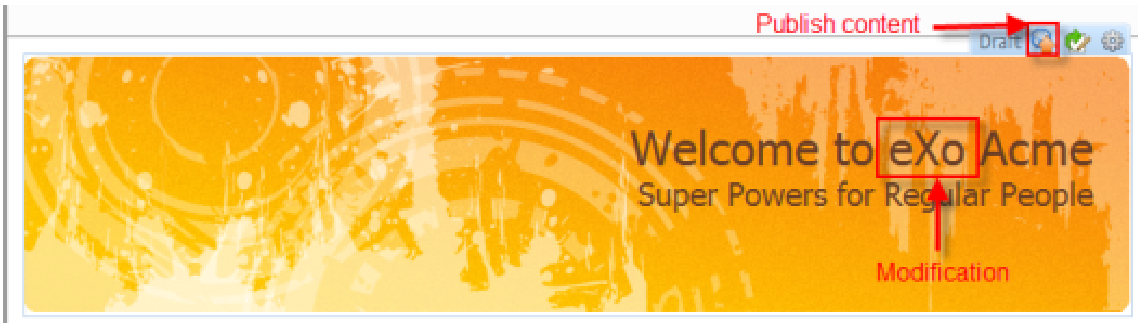
1. Turn on the **Edit** mode by hovering your cursor over **Edit** on the **Administration** bar, then select **Content**.

2. Hover your cursor over the content you want to edit, and click at the right corner. You will be directed to **Sites Explorer** with the document form for you to edit.



3. Make changes on the content, then click **Save** or **Save & Close** to accept your changes.

4. Click to return to the site. In the **Edit** mode, your new content will be in the "Draft" state with its visible modifications.



5. Click , or Publish on the **Action** bar to publish your edited content. Your content is now in the "Published" state.

> **Note**
>
> You cannot see the edited content in the draft state when you turn off the **Edit** mode.

4.3.2.3. Manage content

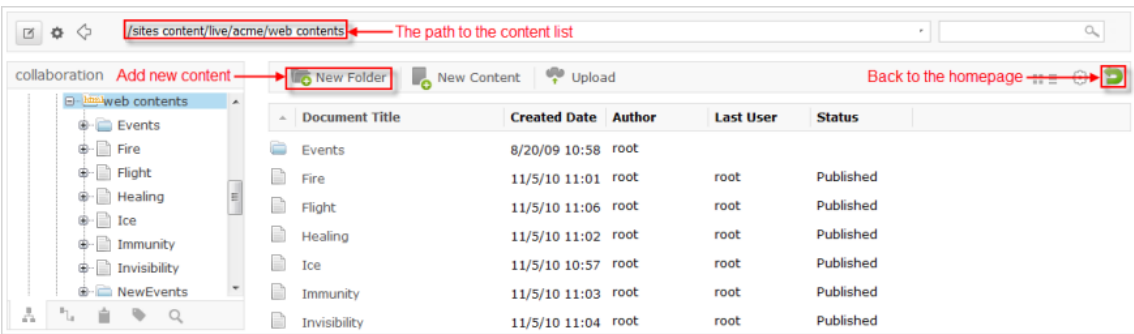
With **InContext Editing**, you can easily manage a Content List Viewer on the homepage. You can add new content in the CLV, edit, delete an existing content or copy/cut/paste to another CLV and take more actions in the right-click menu.

Add content in the CLV

1. Turn on the **Edit** mode.

2. Hover your cursor over the CLV which you want to manage on the homepage, and click .

   You will be directed to the **Sites Explorer** page.



3. Click New Content on the **Action** bar.

4. Do the same steps as in the *Add Content* section.

Do other actions

Right-click specific content in the CLV to open the drop-down menu. From here, you can do many actions as mentioned in the *Actions on folders and documents* section.

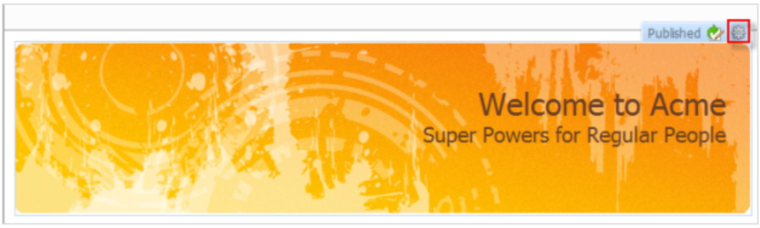
4.3.2.4. Manage preferences

Preferences enable you to edit content in the Single Content Viewer (SCV) and the Content List Viewer (CLV), reset the display of the content in SCV and CLV and publish content.

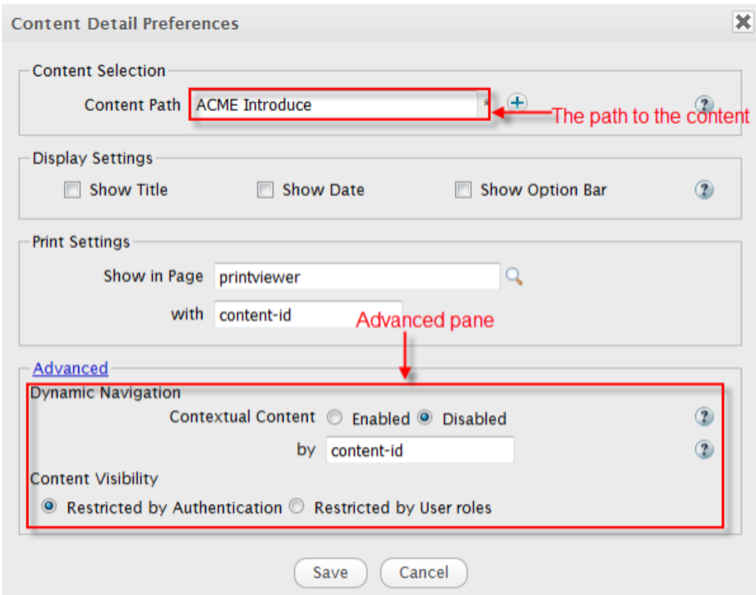
Edit the Single Content Viewer

1. Turn on the **Edit** mode.

2. Select of a Single Content Viewer.



The **Content Detail Preferences** dialog appears.



Details:

Table 4.10.

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

Field	Description
Display Settings	Configure the visibility of Title, Date and Option bar. • **Show Title:** Select this checkbox to display the title of the content. • **Show Date:** Select this checkbox to display the date of the content publication. • **Show Option Bar:** Select this checkbox to display the **Option** bar which is used to show the print link.
Print Settings	• **Show in Page:** The content is shown in the page. • **with:** Parameters contain the content path.

Advanced link:	When clicking this link, the **Advanced** pane will be shown with two parts.
	
	• **Dynamic Navigation:** Allow you to get a parameter to configure the portlet by URL. It means that the URL containing the content path can be dynamically changed.
	  • **Disable:** By default, if the property is set as "Disable", the **Advanced** pane is closed by default. It means the 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) and the content.
	  • **By:** This parameter is the key in the URL to let SCV know which really is the path in the current URL. It is editable when the **Contextual Content** is set to "Enable".
	• **Content Visibility:** Allow you to use a cache shared between users to get content. If you want to get content,

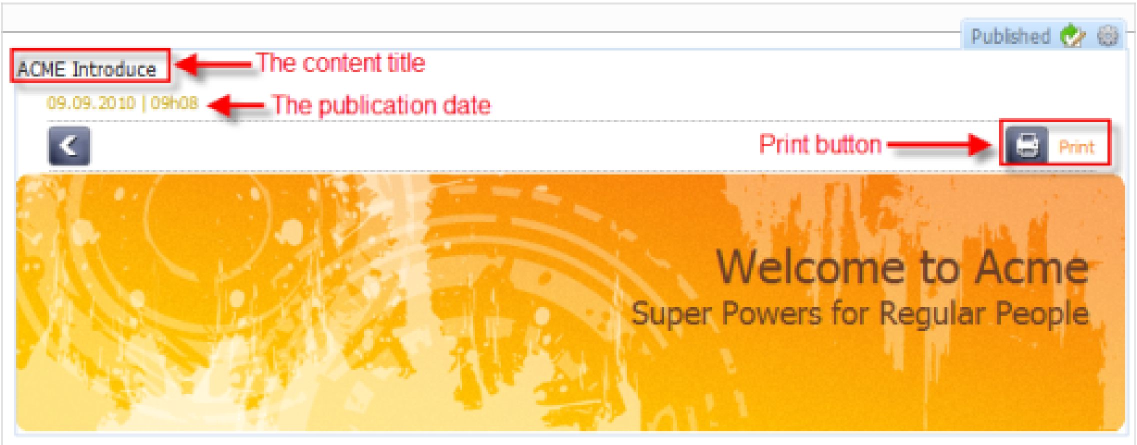
Field	Description
	which are displayed in CLV or SCV, from one cache, select **Restricted by Authentication.** If not, select **Restricted by User Roles.**

> **Note**
>
> Hover your cursor over ⓘ to see a quick help for each section.

3. Click ⊕ next to the **Content Path** to select another content. The **Select Content** dialog appears.

4. Select a folder in the left pane, and its content in the right pane. The selected content will be displayed in the **Content Path** field.

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



i. In the **Print Setting** part, click 🔍 to open the **UIPageselector** dialog. You will see **Printviewer.**

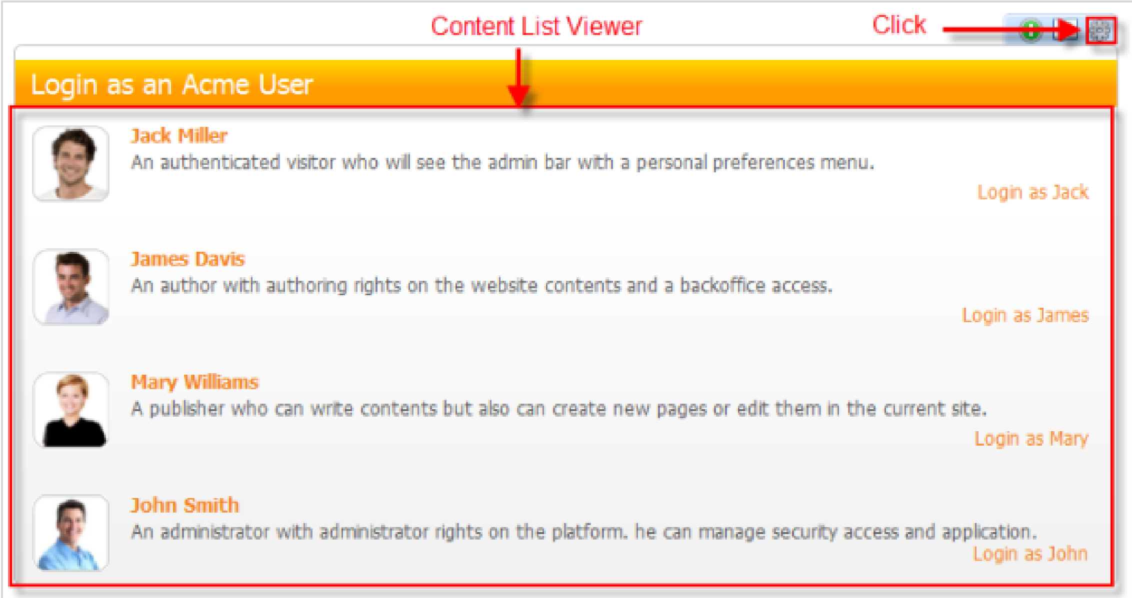
ii. Click the **Print** button. The content is opened in the print viewer page.

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

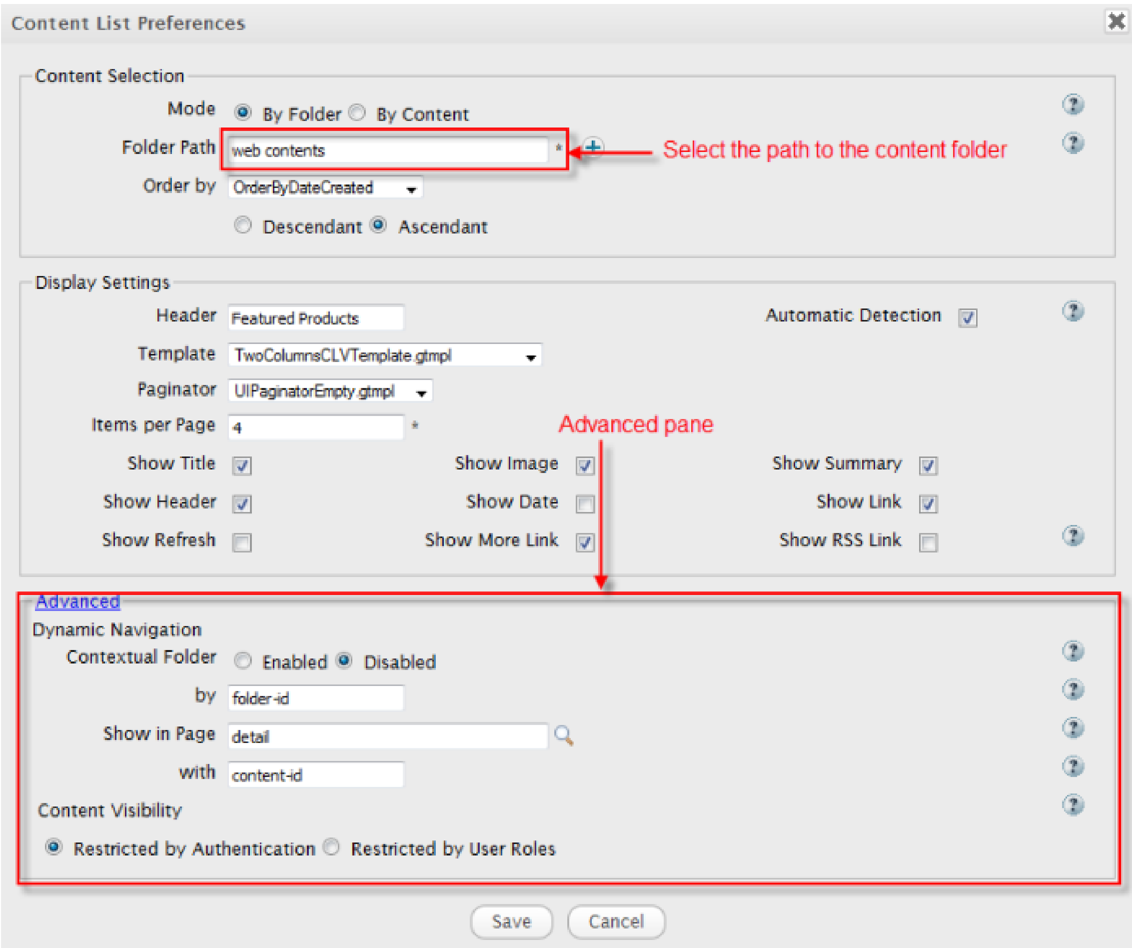
Edit the Content List Viewer

1. Turn on the **Edit** mode.

2. Select the **Preferences** icon of a Content List Viewer.



The **Content List Preferences** dialog appears.



Details:

Table 4.11.

Field	Description
Content Selection	**Mode:** This mode is to select web content for the list viewer. There are two modes: • **By Folder:** This mode allows you to select a content folder in the **Folder Path** field. • **By Content:** This mode allows you to select by the content in a specific folder in **Folder Path** field. **Folder Path:** The path to a location of a folder that contains the content. **Order by:** Sort content in the List Viewer by **Title, Date Created** or **Date Modified** in ascending or descending order.
Display Settings	**Header:** The title of all content that is listed in the List Viewer. **Template:** The template which is used to view the content list. **Paginator:** The template which is used to view each content in the list. **Items per Page:** The number of items which will be displayed per page. The following options which can be shown or hidden by ticking or unticking checkboxes respectively. • **Show Title:** Title of each published web content/document. • **Show Header:** Header of each published web content/document. • **Show Refresh:** The **Refresh** button at the left bottom of the page. • **Show Image:** The illustration of each published web content/document.

Field	Description
	• **Show Date:** The created date of each published web content/document. • **Show More Link:** The **Read more** link to read all the content of web content and/or document. • **Show Summary:** The summary of each web content/document. • **Show Link:** The link of web content/ document. • **Show RSS Link:** The RSS link of all content of web content/document.
Advanced link	**Dynamic Navigation** • **Disable:** The 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). • **By:** This parameter is the key in the URL to let CLV know which really is the path in the current URL. • **Show in Page:** The single content in CLV will be shown in a selected page. You can select any page but should take one with a Content Detail Portlet. The "Dynamic Navigation" is enabled in the Content Detail Portlet 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. **Content Visibility:** Allow you to use a cache shared between users to get content. If you want to get content, which are displayed in CLV or SCV, from one cache, select

Field	Description
	Restricted by Authentication. If not, select **Restricted by User Roles.**

3. Browse the documents or web content of an available site by clicking next to the **Folder Path** field.

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

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

5. Enter a header for the content list in the **Header** field if you want.

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

7. Tick/Untick your desired options.

8. Click **Save** to accept your changes.

4.3.3. Inline Editing

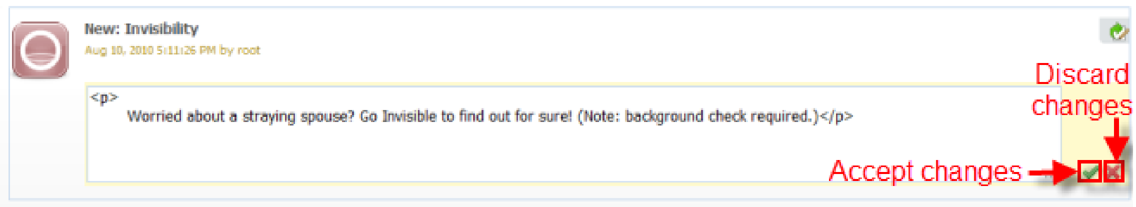
The **Inline Editing** mode allows you to edit directly on the page without going to a separate one. By using this mode, you can edit the text in the same location in such an intuitive and convenient manner.

Do the Inline Editing

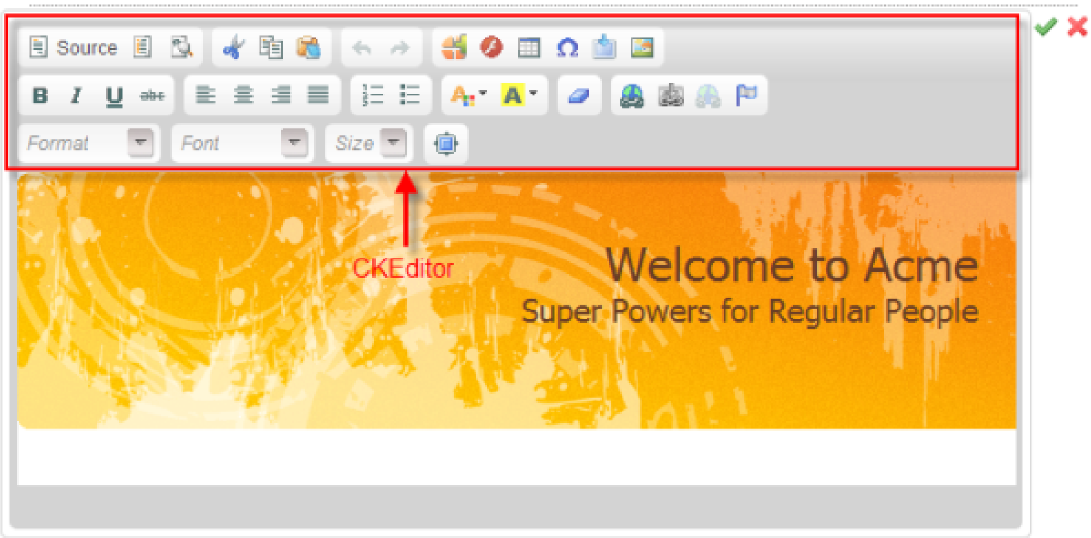
1. Turn on the **Edit** mode on the **Administration** bar.

2. Hover your cursor over the area you want to edit. The editable area will be highlighted.

3. Double-click the area until the Edit area is shown as below.



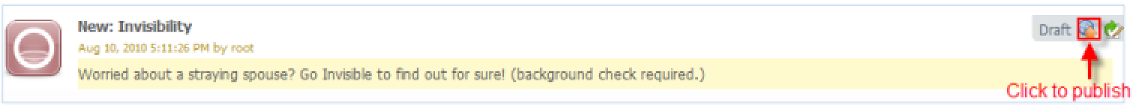
   In case the hovered area is in the Rich Text format, the Edit area will be displayed with the *CKEditor* [http://docs.cksource.com/CKEditor_3.x/Users_Guide] as below. (See more information about CKEditor *here*.)



4. Make changes on your selected area.

5. Click  to accept, or  to discard changes.

- After you have made changes on your content, it is only in the **Draft** state.



- Click  to publish the content. Now, your edited content is in the **Published** state.

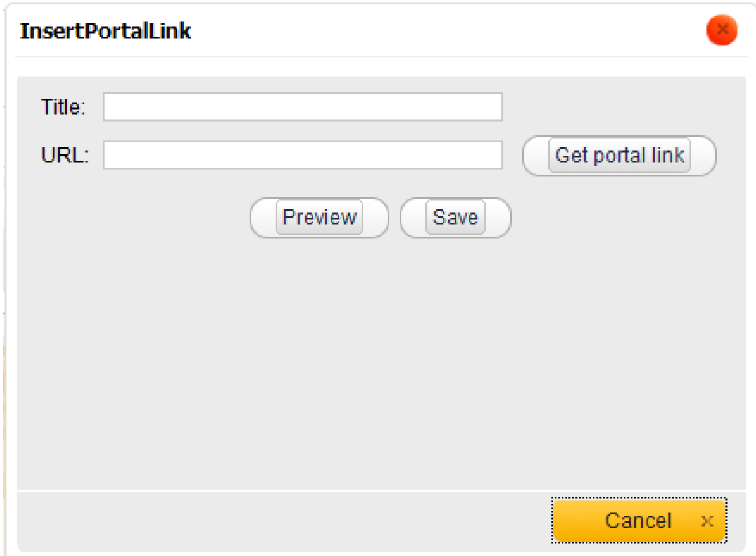
4.3.4. CKEditor

When using CKEditor to write/edit a document, you can also:

- *Insert a portal link to the document. [56]*
- *Insert a content link to the document. [57]*

Insert a portal link

1. Click  to open the **Insert Portal Link** form.



2. Enter the title of the portal in the **Title** field.

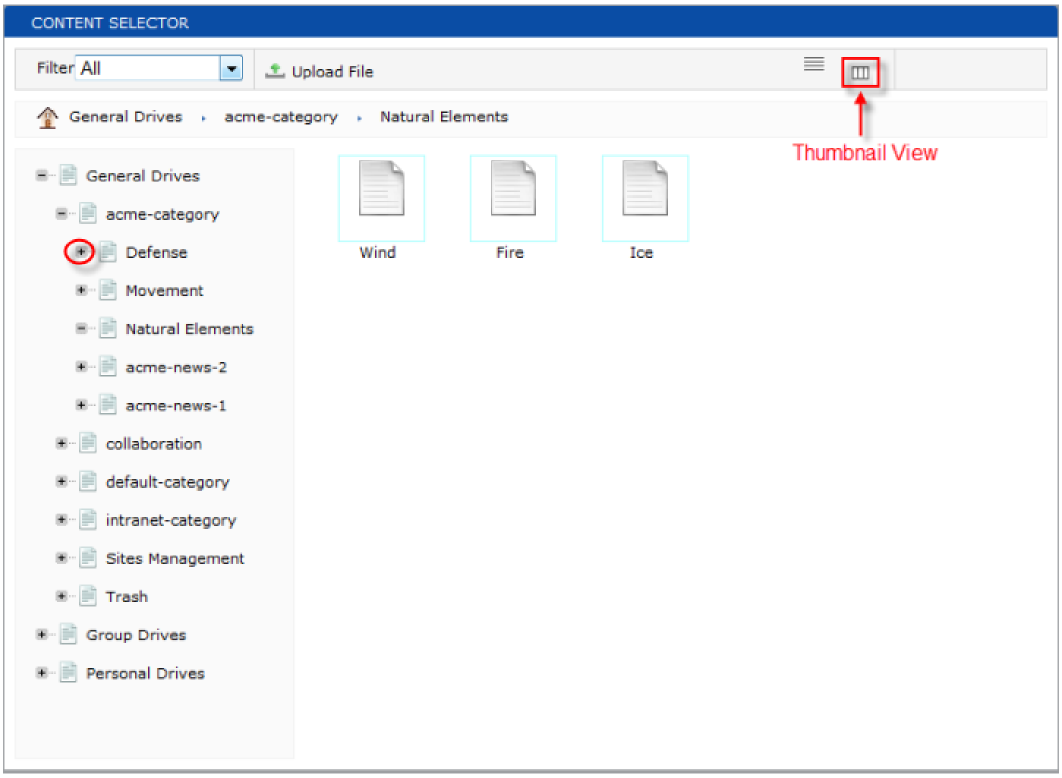
3. Enter the portal URL manually, or you can also click **Get portal link** to open a page containing all the portals in the same server, then select one that you want.

4. Click **Preview** to view the portal.

5. Click **Save** to accept inserting the portal to the document.

Insert a content link

1. Click  to open a page.



2. Click the plus before the document name, or click directly the document name in the left pane to show the content in the right pane, or click Upload File to upload a file from your local device.

3. Click content that you want to insert to the document.

4.3.5. Publication process

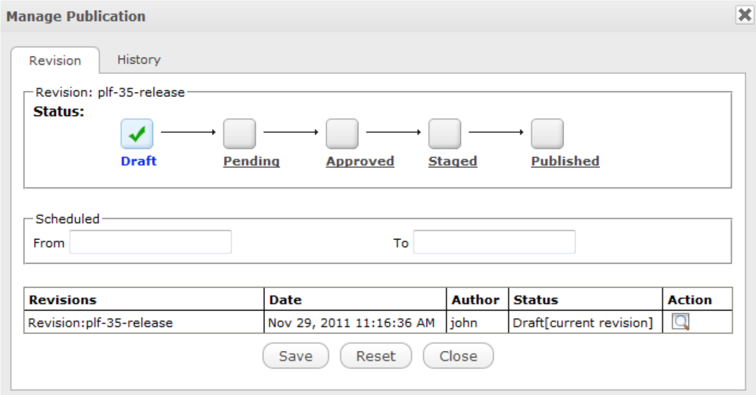
After new content has been created, it is saved as draft and you can easily to publish it on your site. The publication process consists of four steps:

Request for Approval --> Approval --> Stage --> Publish

In case you want to publish your content without having the "Approve" or "Publish" right, you first need to send your request for approval.

In case you have the right to approve or publish content, you can yourself publish it with the **Stage** step immediately.

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



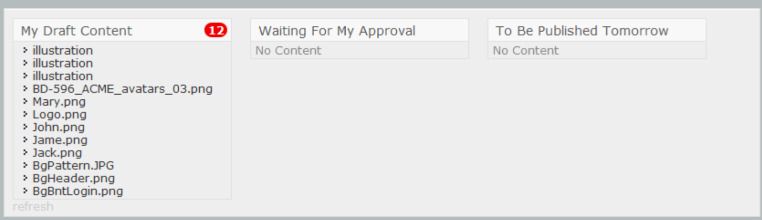
- **Approve:** To approve content, click **Approve** on the **Action** bar of the Sites Explorer, or **Approved** in the **Manage Publication.**

- **Stage:** This step allows you to publish content in a period. After selecting the publication schedule for the content, it will be automatically published as the schedule.

  To publish your content just in a stage, click **Stage.** Then, click **From/To** to select the start and end dates for publication from a mini-calendar.

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

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

> **Note**
>
> You will see a list of draft content, pending content which are waiting for your approval if you have the approval right, and content that will be published at the bottom of the **Sites Explorer**. Click your desired content to review, approve or publish.
>
> 
>

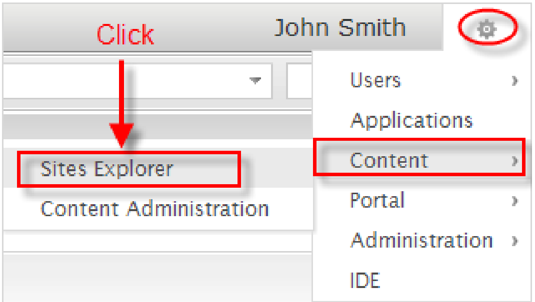
4.4. Create content inside a category

In eXo Platform, you can create new content in any folders or directly in a CLV with **Incontext Editing.** However, to facilitate the content management, categories are usually used to sort and organize documents that makes your desired searches more quickly. Also, creating content inside a category helps you manage and publish them effectively.

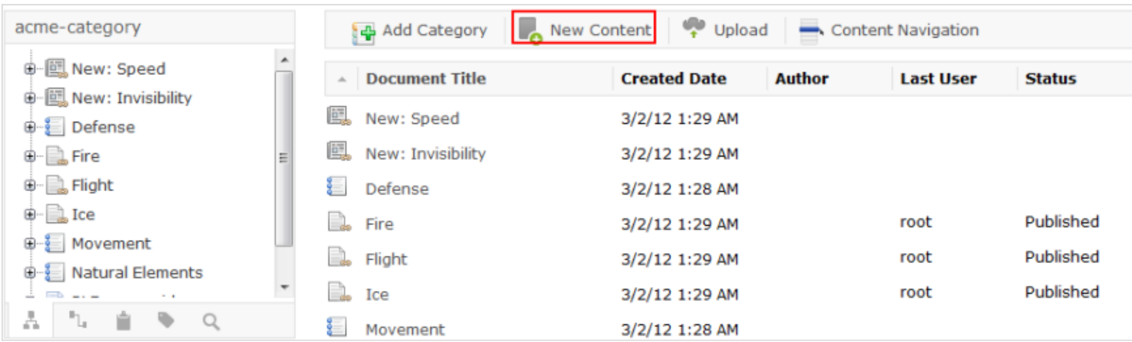
After creating a document, you should categorize it by adding it to a category. Otherwise, documents should be created right in a category and links to those documents will be automatically created in the category. In eXo Platform, categories are stored in JCR.

Create content in a category

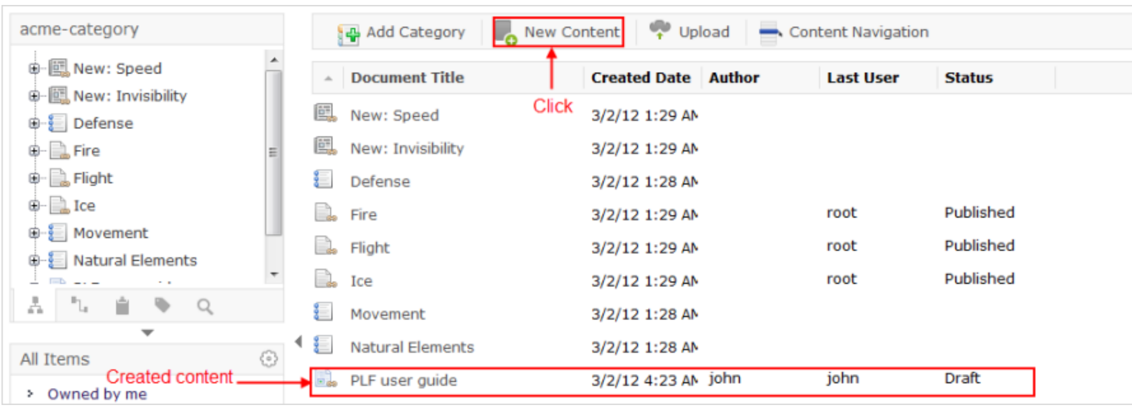
1. Hover your cursor over **--> Content --> Sites Explorer** on the **Administration** bar.



For example, select the **acme-category** drive as the following illustration.



2. Click the **New Content** button to create new content. See the *Add a document* section to know how to add new content. The new content is a Symlink. To view the content, simply click the Symlink.



4.5. Dynamic Navigation

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

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

Do the following to access Dynamic Navigation:

Procedure 4.1. Access Dynamic Navigation

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

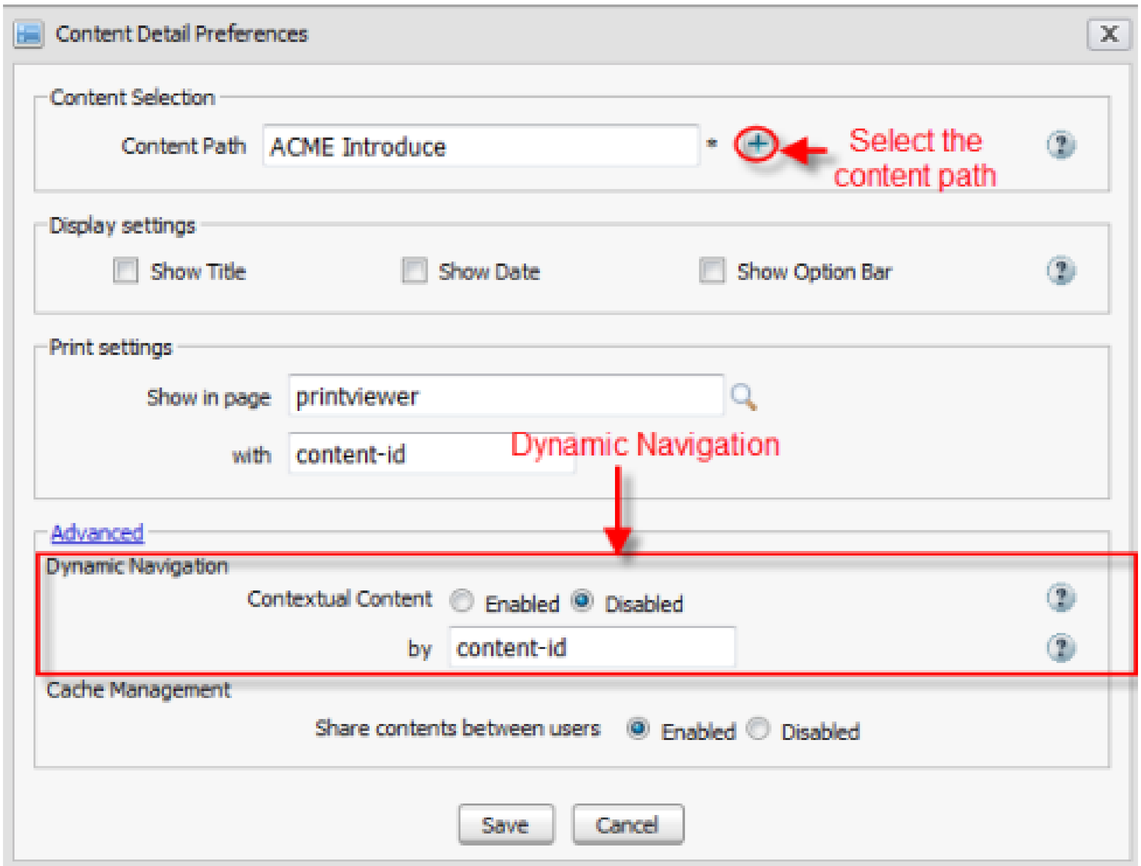
   If you select the Preferences icon of SCV, the Content Detail Preferences form displays.

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

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

   The Dynamic Navigation will display.

   Dynamic Navigation in SCV



   Details:

Table 4.12.

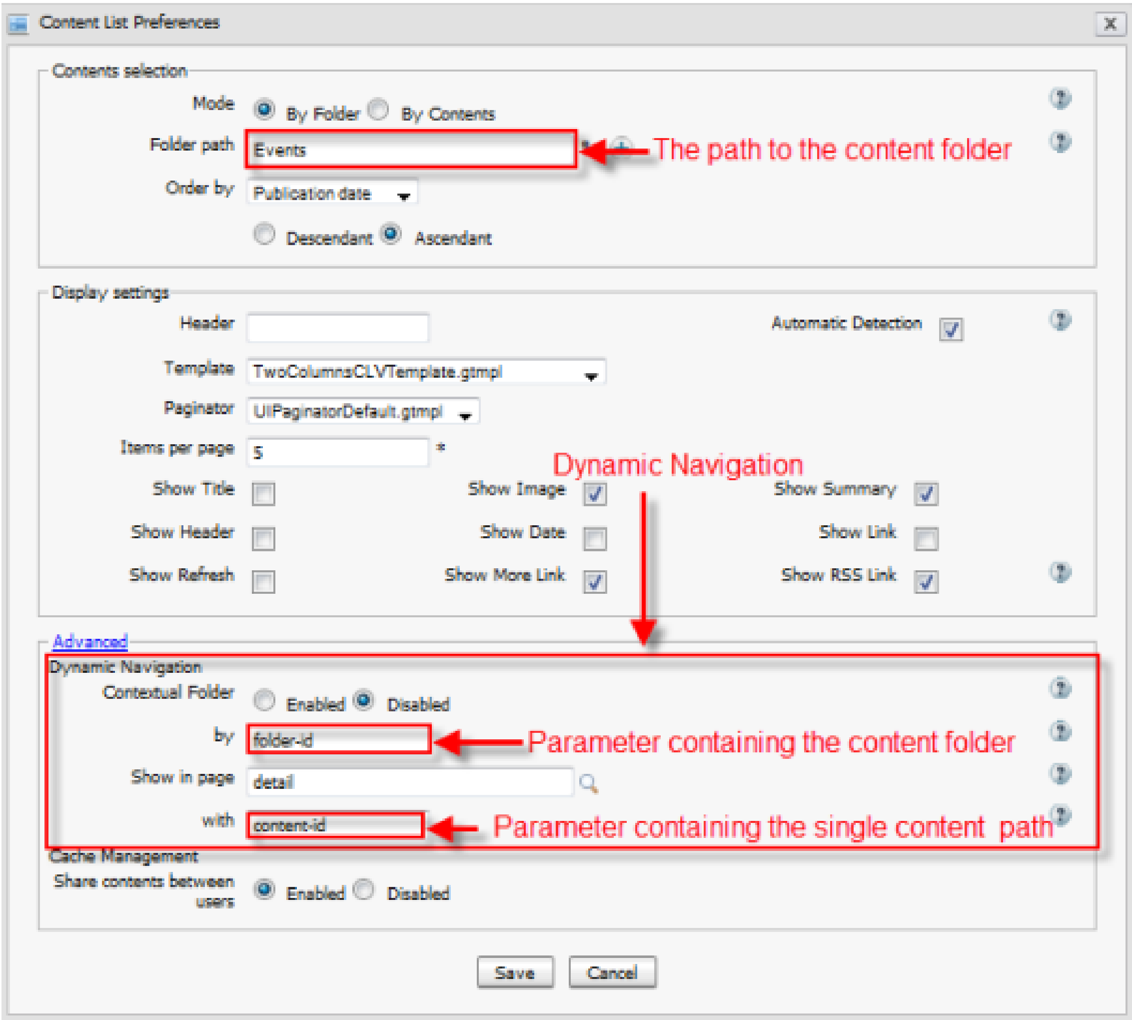
Contextual Content	• Disable: It means the single content will be opened by an URL containing the Content Path.

	• Enable: This portlet is configured with the provided parameter (content-id by default).
By	This parameter is the key in the URL to let SCV know which really is the path in the current URL. It is editable when Contextual Content is Enable.

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

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

Dynamic Navigation in CLV



Details:

Table 4.13.

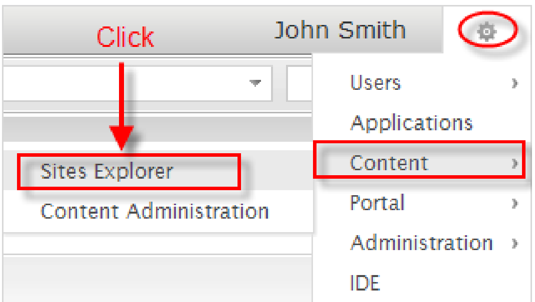
Contextual Folder	• Disable: It means the single content will be opened by an URL containing the Folder Path (for CLV) • Enable: It means the path of content list (Folder Path in the Content Selection path) can be dynamically changed by URL.
By	This parameter is the key in the URL to let CLV know which really is the path in the current URL.
Show in page	The 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 the single content.
With	This parameter is the key in the URL to let SCV know which really is the path in the current URL.

4.6. Content Explorer

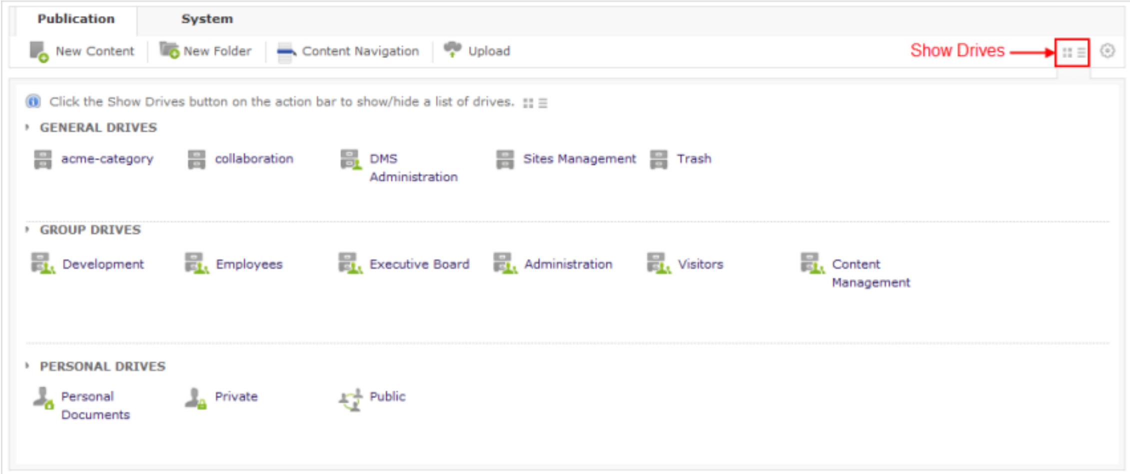
4.6.1. Access Sites Explorer

This page is used to manage all documents in different drives. This is really a flexible way because you can do through Internet whenever and wherever. By default, anyone can access **Sites Explorer,** but the ability to do actions on **Sites Explorer** depends on the role of each user.

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



A list of all drives organized in groups (**Personal** drives, **Group** drives and **General** drives) in the **Sites Explorer** are displayed.



Personal drives

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

Group drives

The working space of users of a specific 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.

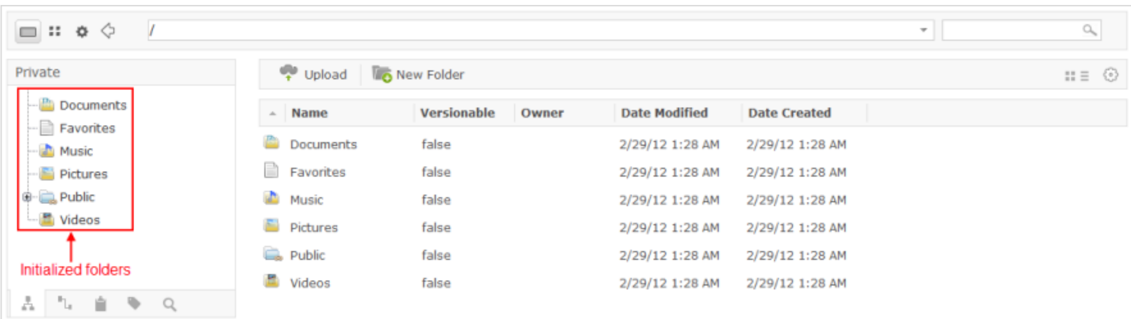
General drives

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

4.6.2. Drives

4.6.2.1. Private drive

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



By default, there are some initialized folders to store private resources of users.

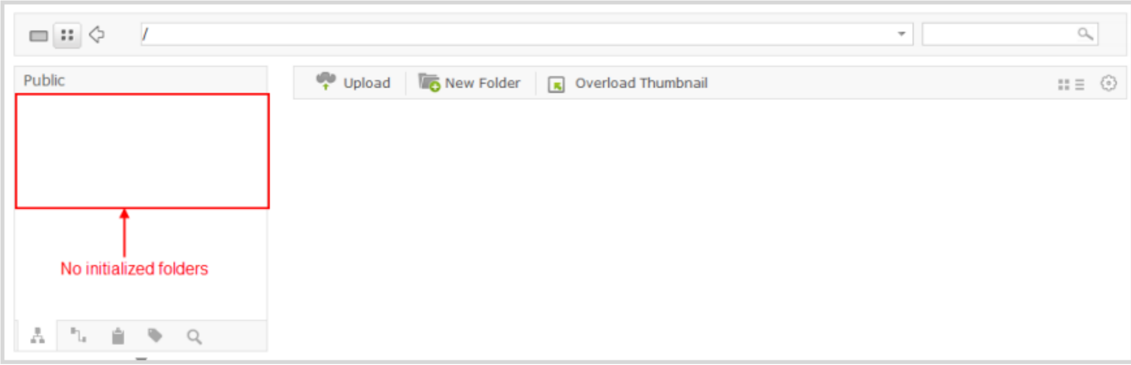
In **Private** drive, there are many functions on the **Action** bar, including:

- Create new folders/documents.
- Upload files from your computer.
- Add Symlinks.
- Overload Thumbnails.
- Watch/Unwatch documents.
- Add tags to a document.
- Set multiple languages for a document.
- Vote for a document.
- Comment on a document.
- By selecting the Search tab, you can:
  - Do the simple search.
  - Do the advanced search with more constraints, or by adding new queries to search.
  - Do search by existing queries.
- In addition, you can:
  - Set up your browse preferences.
  - Cut/Copy/Paste/Delete nodes.
  - Lock nodes.
  - Rename nodes.
  - View document content by the WebDAV function.
  - Download documents (folders) to your machine.

4.6.2.2. Public drive

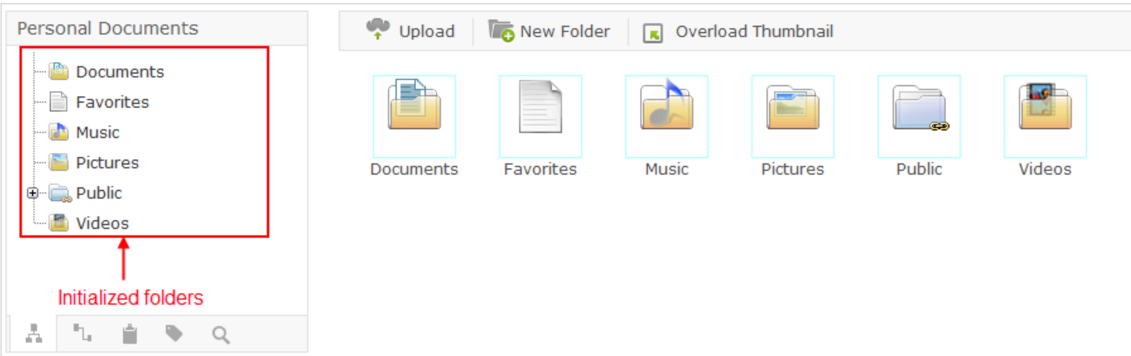
With the **Public** drive, there is no initialized folder but you can create by yourself.

In the **Public** drive, you also can take similar actions to those in the **Private** drive.



4.6.2.3. Personal Documents drive

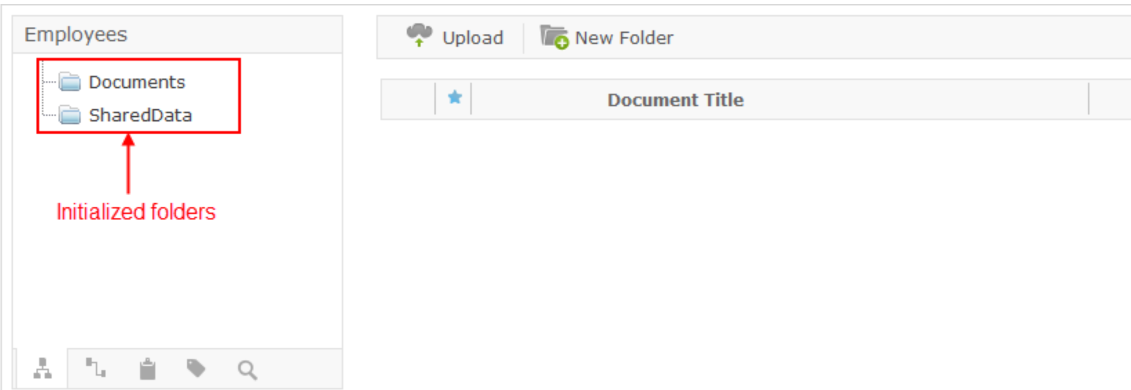
This drive consists of some initialized folders as the **Private** drive.



In the **Personal Documents** drive, you also can take similar actions to those in the **Private** drive.

4.6.2.4. Drive of a specific group

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



> **Note**
>
> Drives which are created during *space creation* are visible and accessible by their members only.

The space drives only can be deleted when the spaces are deleted by the space manager.

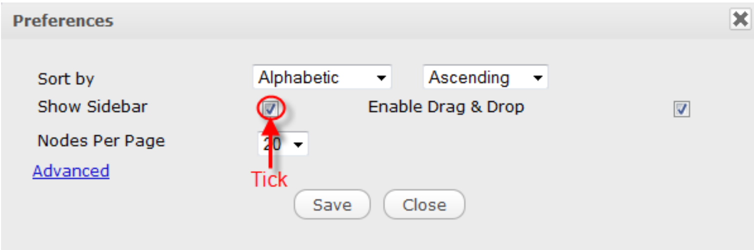
4.6.2.5. Hide/Show the sidebar in a drive

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

You can hide/show the sidebar in two ways:

The first way

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

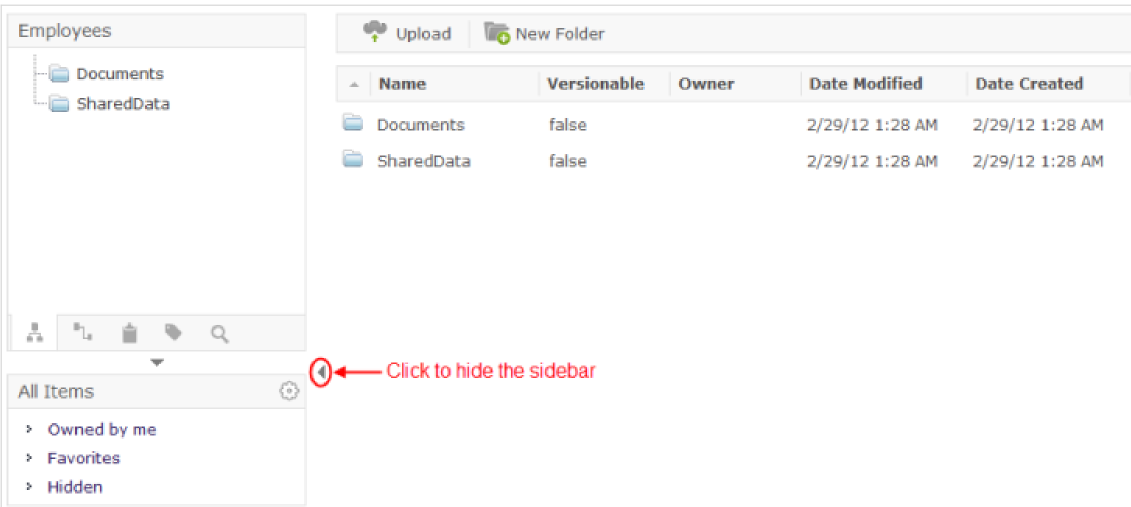


2. Deselect the **Show Sidebar** checkbox, then click **Save** to accept your changes.

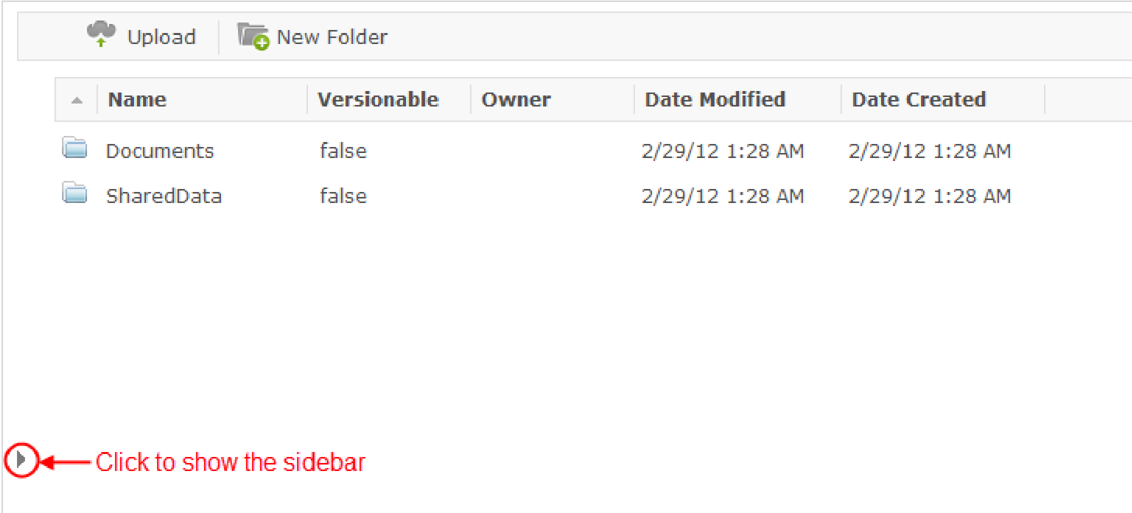
- To show the sidebar, tick the **Show Sidebar** checkbox in the **Preferences** form.

The second way

- Simply click to hide the sidebar as the illustration below.



The drive will be displayed like the illustration below.



- Click to show the sidebar.

4.6.3. Views

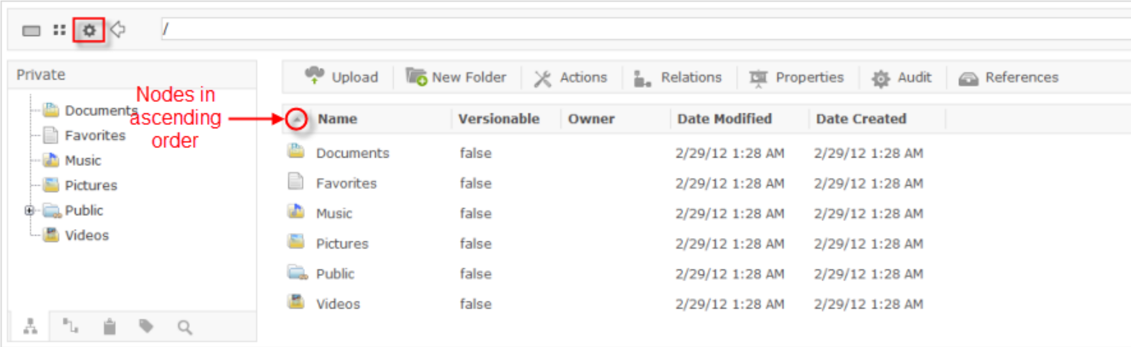
There are many drives in **Sites Explorer**. Each drive has some views that enable you to view data in the drive in a particular way. Each view has some action tabs and each action tab contains some functions.

eXo Platform supports you some ways to view nodes in a specific folder and show actions of corresponding tab on the **Action** bar.

> **Note**
>
> The number of view types depends on which drive you are browsing. In eXo Platform, you can manage view types by selecting **--> Content --> Content Administration --> Content Presentation --> Manage View.** See the *Manage views* section for more details.

4.6.3.1. Admin view

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

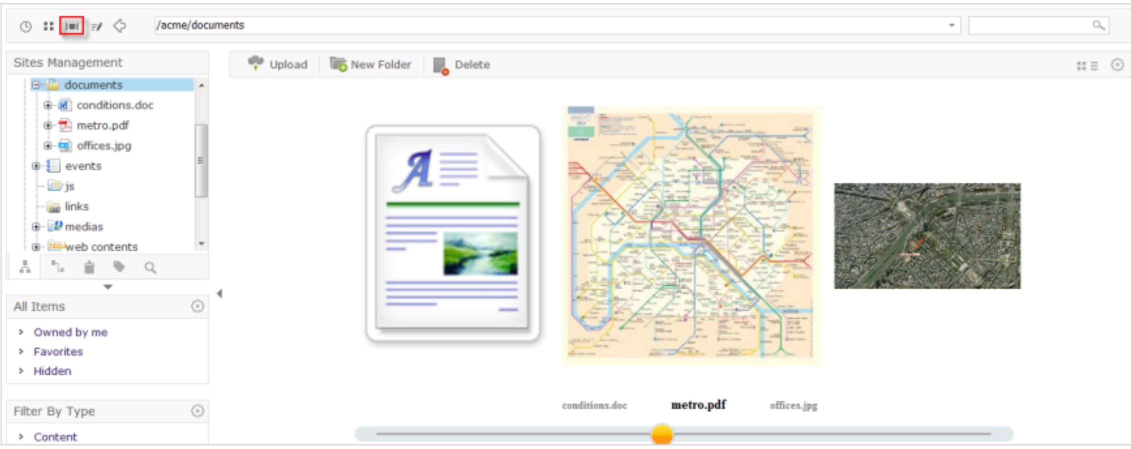


You also can sort nodes to the nodes information by clicking the label of corresponding column.

- indicates that nodes are ordered in the ascending order.
- means nodes are in the descending order.

4.6.3.2. Cover Flow view

This view is defined as a dynamic one with the side-scrolling view to nodes in a folder. In this view, when a node is selected, its name is set with bold effect to more outstanding than others.

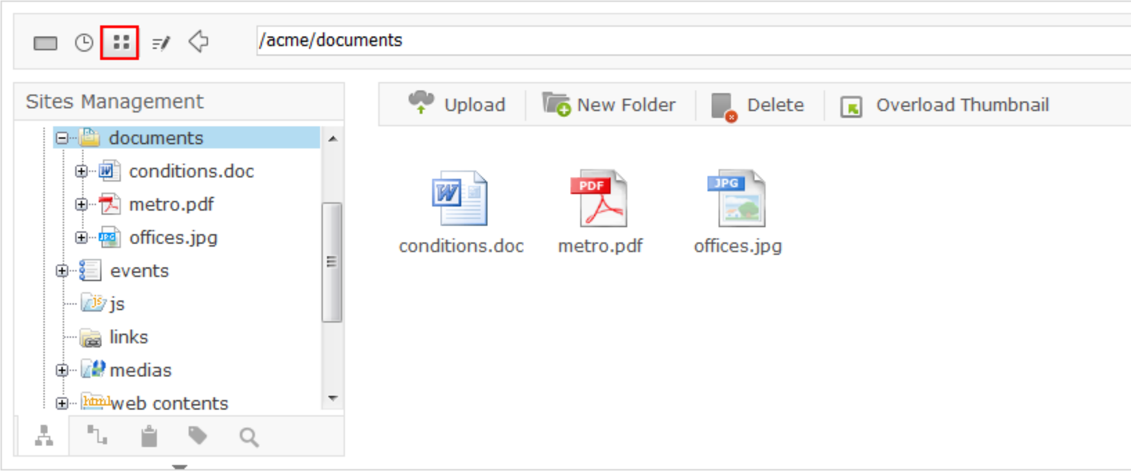


To move from one node to another one, you can do one of these ways:

- 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.

4.6.3.3. Icons view

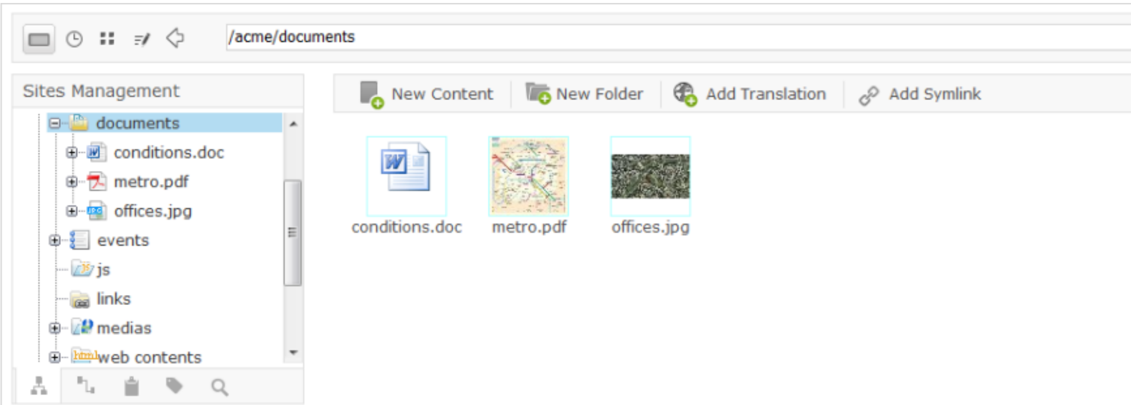
In this view type, nodes in a specific folder will be viewed as icons. The name of each node will be shown under its icon.



4.6.3.4. Thumbnails view

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

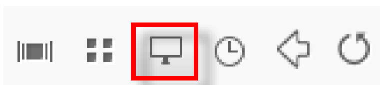
If nodes are image files, their thumbnails will be shown like the screenshot below.



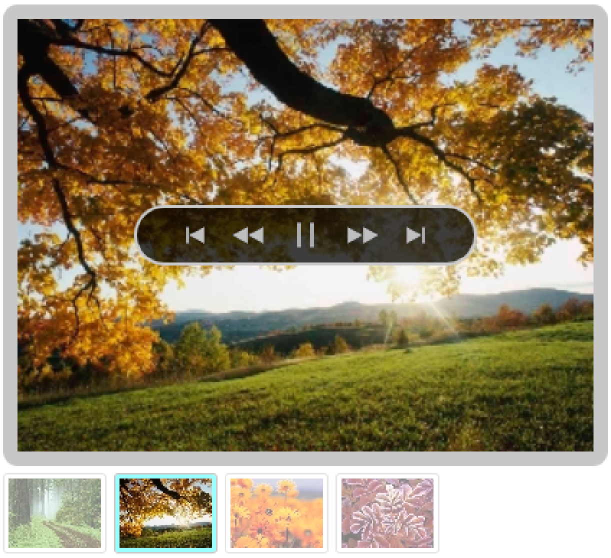
4.6.3.5. Slide Show view

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

To view pictures in the slide show, click .



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



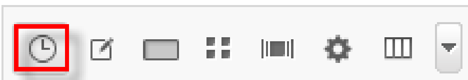
The **Slide Show** view automatically shows all picture nodes. Users can control this slide show by clicking the below buttons.

Table 4.14.

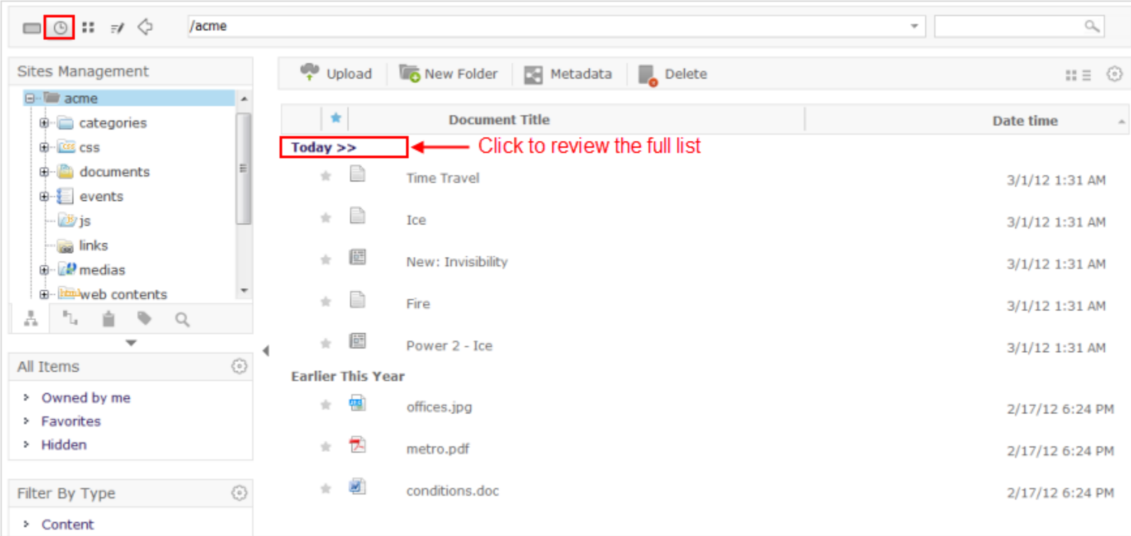
Button	Function
	Go to the first picture node.
	View the previous picture node.
	Pause the slide show. After clicking this button, will become . Click to continue viewing the pictures node.
	View the next picture node.
	View the last picture node.

4.6.3.6. Timeline view

This view enables users to view all document nodes created and uploaded by simply clicking .



All the document nodes, which have been created and uploaded, will be displayed.



- Click the node name to view its content in details.
- Click a timeline category, such as **Today**, **Yesterday**, **Earlier This Week**, **Earlier This Month**, and **Ealier This Year** to review all the nodes of the category. Click it again to return the the default.
- Click to mark your item as favorite, or of a favorite node again to remove it from favorites.

4.6.4. Functions on action tabs

> **Note**
>
> Functions are added to tabs in **Sites Explorer** by administrators. The number of displayed actions depends on each tab and each drive you are browsing and your role.

4.6.4.1. Add a category

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

1. Select a node to which you want to add a category.
2. Select Add Category on the **Action** bar to open the **Add Category** form.
3. Enter a name for the category in the **Category Name** field.
4. Click **Save** to accept creating the new category.

4.6.4.2. Add a document

There are several types of document in eXo Platform, such as **File, Article, Podcast, Sample node, File Plan, Kofax,** and more.

The table below shows types of nodes which can be added to various document types. The rows indicate which nodes in the left column can be added. The columns indicate which nodes at the top can contain.

Table 4.15.

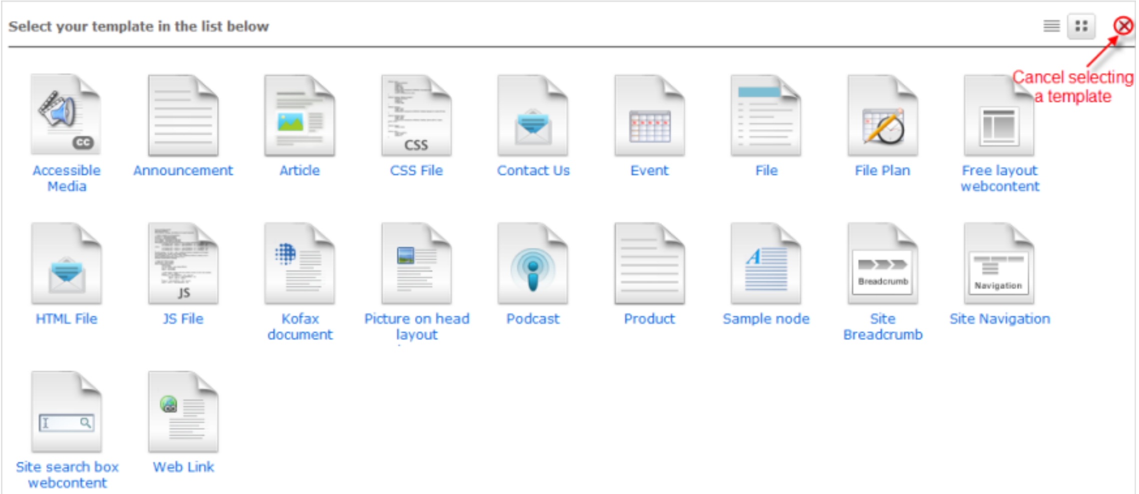
	File	Article	Podcast	Sample node	File Plan	Kofax documen	Content folder	Documen folder
File	✓	✓	✓	✓	✓	✓	✓	✓
Article	✓		✓			✓	✓	
Podcast	✓	✓	✓	✓	✓	✓	✓	✓
Sample node	✓		✓			✓	✓	
File Plan	✓		✓		✓	✓	✓	✓
Kofax	✓	✓	✓	✓	✓	✓	✓	
Uploaded file	✓	✓	✓	✓	✓	✓	✓	✓
Content folder	✓	✓	✓	✓		✓	✓	
Document folder	✓		✓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

> **Note**
>
> ✓ indicates that the corresponding document can be added into. A blank entry means that the corresponding document cannot be added into.
>
> Following the horizontal, you will know which nodes can be added.
>
> Following the vertical, you will know which node can be included.

Add a new document

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

2. Click New Content on the **Action** bar to open a list of content templates.



3. Click your desired template. See more details in *Step 3 [46]* of the *Add content* section.

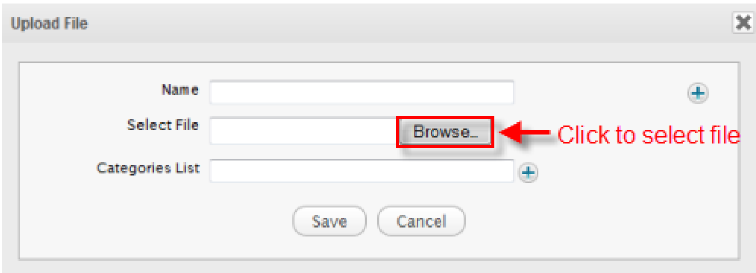
   Each document (except Article) must be added to categories when being created.

Attach files to a document

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

on the **Action** bar.

   The **Upload File** form will appear.

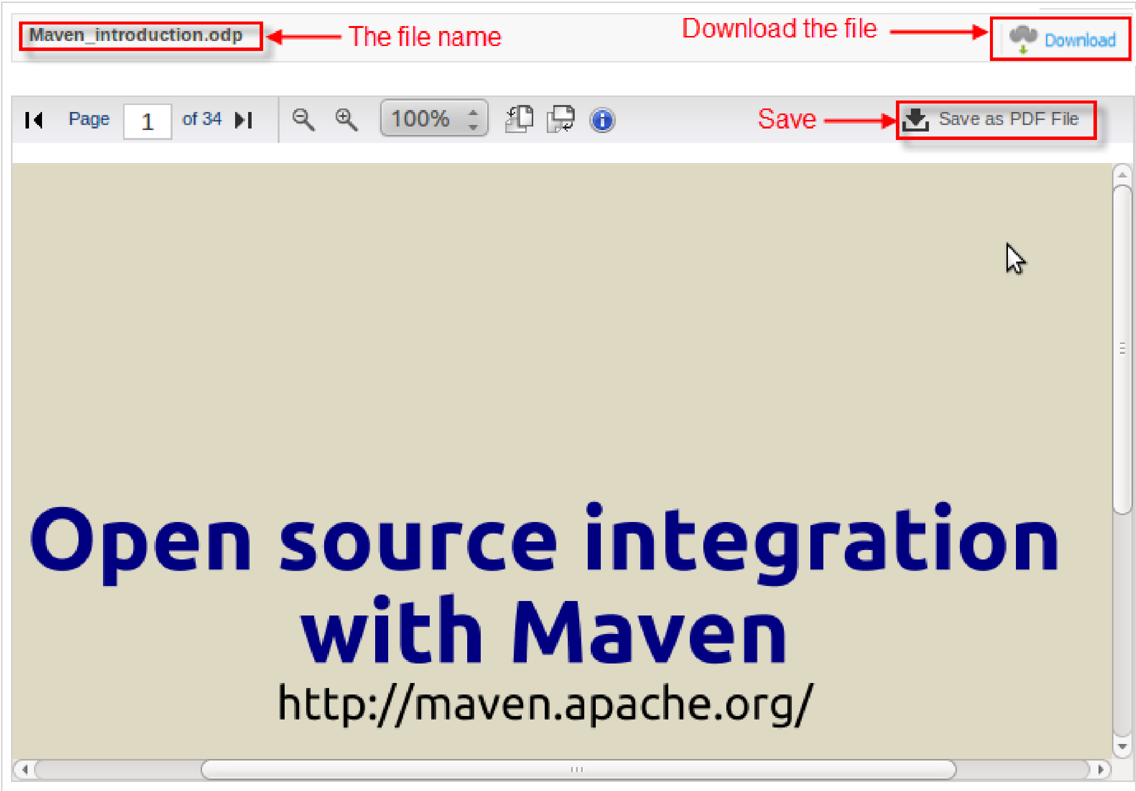


2. Enter a name into the **Name** field. If not, the **Name** field is automatically filled with the file name.

3. Click **Browse...** to select the attachment file. You can click  to add more files.

4. Click **Save** to attach the files.

   To view the attached file directly in **Sites Explorer,** simply click its name.



Note

eXo Platform enables you to view all types of documents, such as Open Office, Microsoft Office in the PDF format.

Create a new File document

1. Follow the steps in the *Add a new document[73]* section to open the corresponding form to add a **File** document.

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

3. Click the **Mime Type** field and select one type. There are three types of **File** document:

   - **text/html**: when creating a text/html File document, you can input values like source code (HyperText Markup Language HTML) in the **Content** field . After being created, it will generate the content you want, then you can see both the input source code and the generated content in that document.

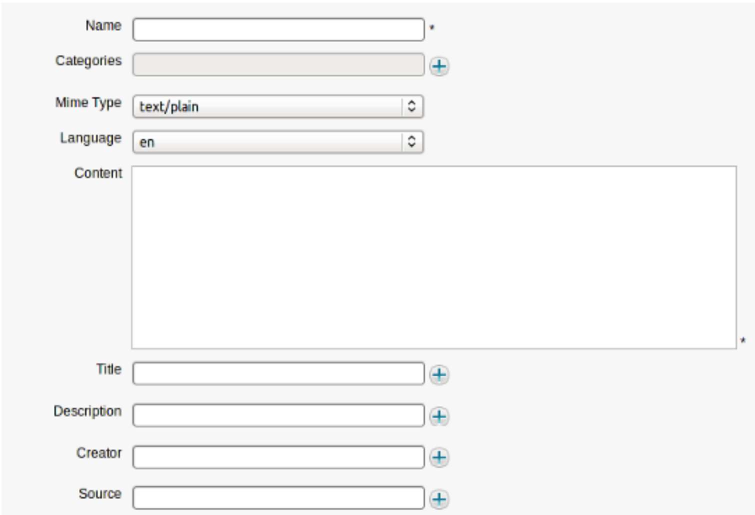
   - **text/plain**: after a text/plain File document is created, it will display exactly what you input in the **Content** field.

- **application/x-groovy+html**: it indicates your file as a groovy file.

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

   - **text/html** or **application/x-groovy+html**: if you want to create a **File** document with a source code and generated content, click the Source button in the **Editor** bar.

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

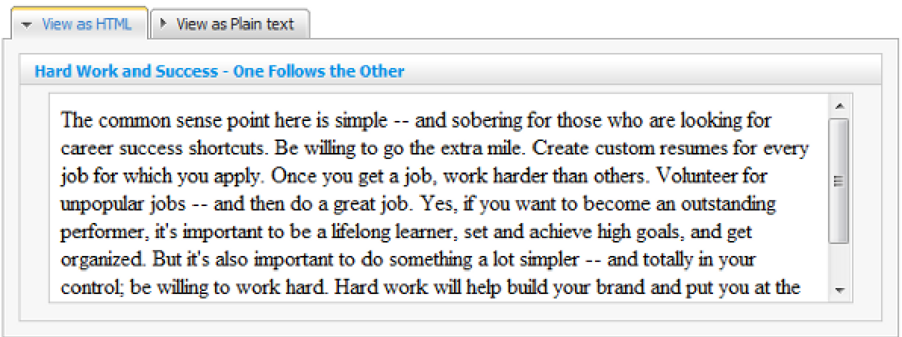


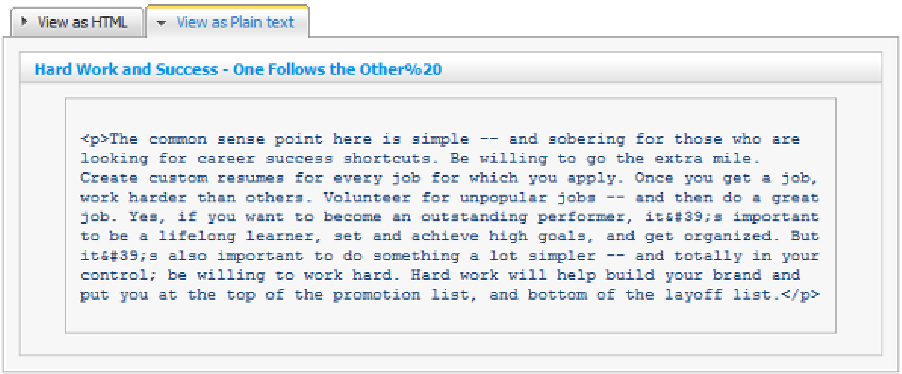
5. Optionally, fill values in all the rest fields, including **Title**, **Description**, **Creator** and **Source**.

   Click to open more fields.

6. Click **Save** or **Save & Close** to accept creating a new file document.

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





Create a new article

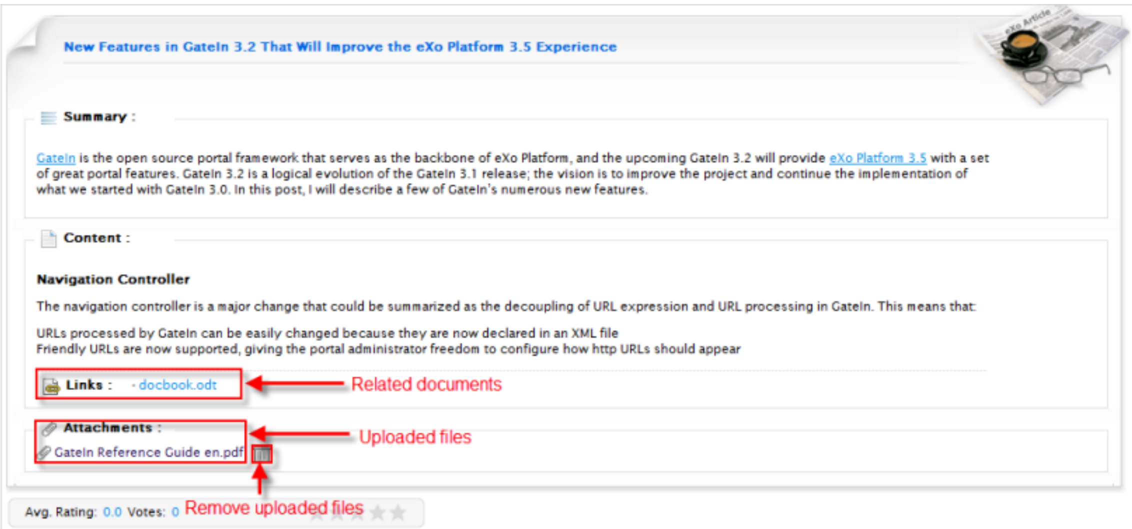
1. Follow the steps in the *Add a new document[73]* section to open the corresponding form to add a new Article document.

2. Input name and title of the Article in the **Name** and **Title** fields. Special characters (@ # % & * ( ) " ' : ; [ ] {} / !) are not allowed in the **Name** field.

3. Input values for both fields: **Summary** and **Content.**

4. Click **Save** or **Save & Close** to accept the inputted values.

After being created, your newly added Article document will be shown as below.



The **Links** area lists all its related documents. After adding relations to a document, Article will be displayed. You can click these links to view the content of the related documents. For more details about how to add a relation to a document, refer to the *Add a relation* section.

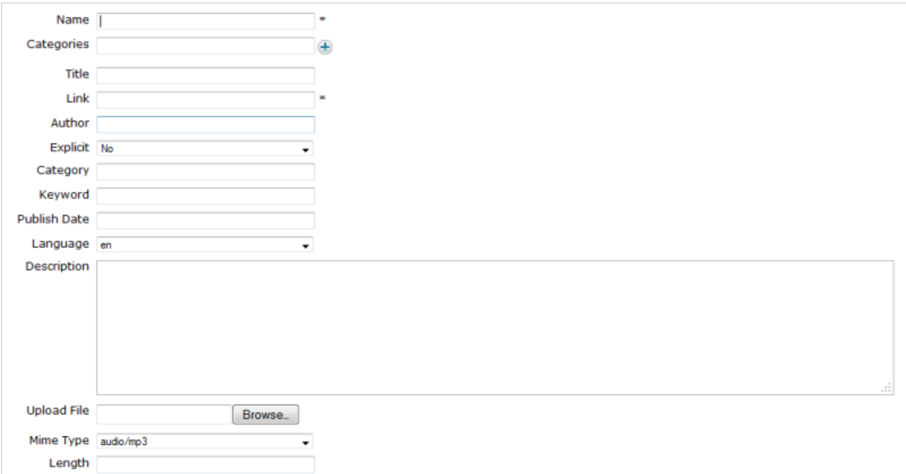
The **Attachments** area lists all its uploaded files/documents which are attached with the Article. You can remove the attachments by clicking 🗑.

For more details about how to add an attachment, see the *Attach files to a document[74]* section.

> **Note**
>
> The name of document may be as the same to that of the existing one. When a new document is created with the same name as other existing document, a numeric index will be added to the name (for example, test [2]).

Create a new Podcast

1. Follow the steps in the *Add a new document [73]* section to open the corresponding **Podcast** form.



Details:

Table 4.16.

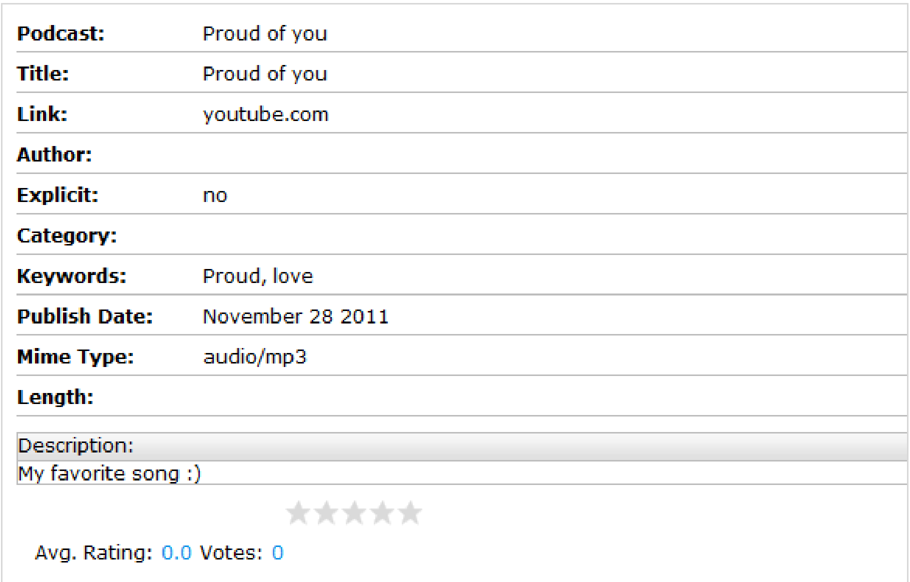
Field	Description
Name	The document name which is required. Special characters (@ # % & * ( ) “ ' : ; [ ] {} / !) are not allowed in the **Name** field.
Categories	Categories of a document.
Title	The display name of a document.
Link	The link to the source path of the uploaded media file that is required.
Author	The author of the uploaded media file.
Explicit	It is used to indicate if your Podcast episodes contain an explicit content or not.
Category	The category of the uploaded media file, for example music, film, or short clip.

Field	Description
Keyword	This field allows you to search your Podcast files more quickly. You can use commas to separate between keywords.
Publish Date	The date when an episode was released.
Description	Information about the uploaded media file.
Mime Type	The type of the uploaded media file.
Length	The length of the uploaded media file.

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

3. Click **Save** or **Save & Close** to finish.

Once being created, a Podcast will be displayed.



Create a new Sample node

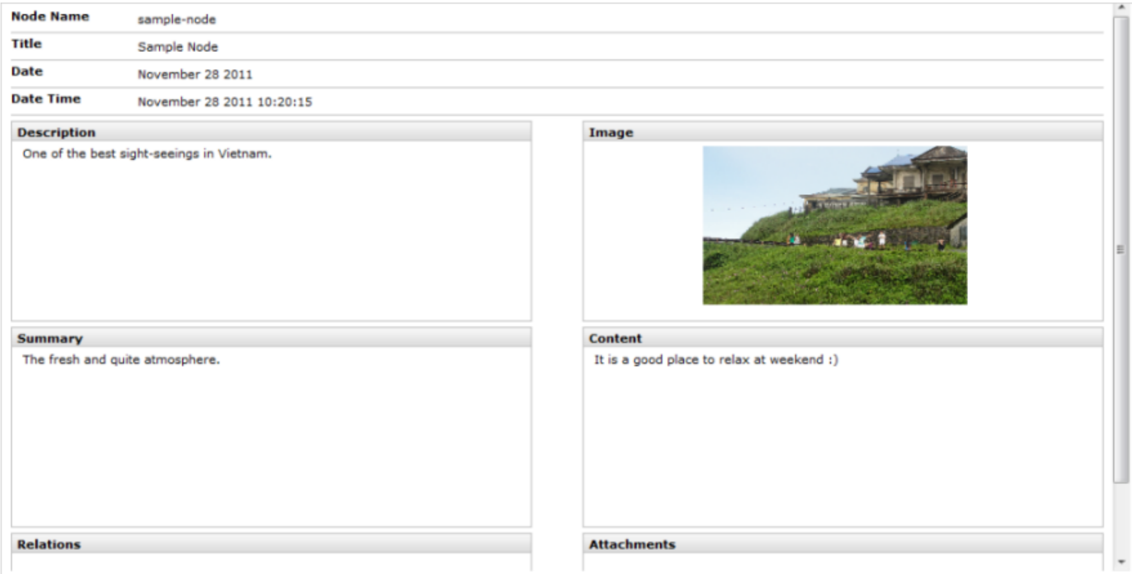
1. Follow the steps in the *Add a new document [73]* section to open the **Sample node** form.

2. Complete the appropriate fields.

3. Click **Browse...** to locate your desired image, and upload it.

4. Click **Save** or **Save & Close** to finish.

After being created, a new sample node will be displayed.



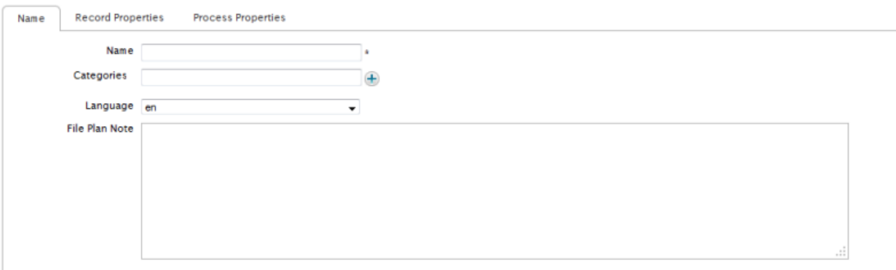
The **Relations** area is used to list all its related documents. See the *View a relation* section.

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

The **Attachments** area is used to list all its uploaded files. See the *Attach files to a document [74]* section for more details.

Create a new File Plan

1. Follow the instructions in the *Add a new document[73]* section to open the corresponding form to add a **File Plan** document.



Details:

- The **Name** tab

Table 4.17.

Field	Description
Name	The name of the file plan.

Field	Description
Categories	Categories of your file plan. Select the categories for your file plan by clicking .
Language	The language of the File Plan document.
File Plan Note	Note for presenting any other information for users.

- The **Record Properties** tab

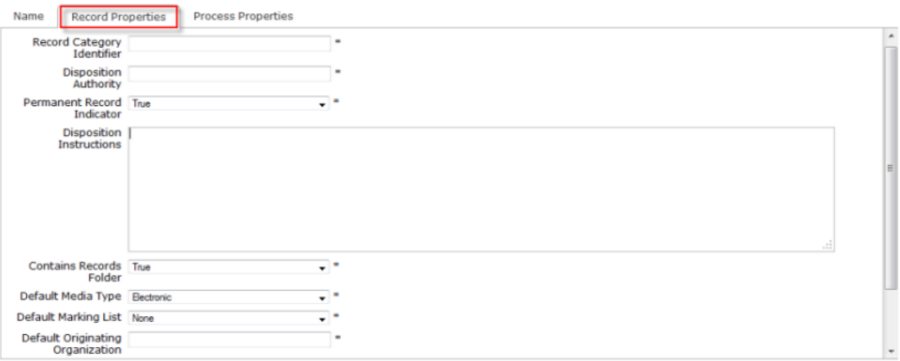


Table 4.18.

Field	Description
Record Category Identifier	The alphanumeric identifier indicates a unique record category. This must be a unique ID. If this field is left blank, it 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 guideline on how to handle the records associated with the file plan.
Contains Records Folder	The confirmation is about whether the records folder is contained or not.
Default Media Type	The choice for preset media types which are made available to simplify the data entry for the record. The frequently-chosen value is "electronic" or paper.
Default Marking List	Handling and classifying information that is printed at the bottom of the record, such as UNCLASSIFIED, or NOCONTRACT.

Field	Description
Default Originating Organization	This option is to enter the original arrangement as default which is made available to simplify the data entry for the record and to assume that originating organizations are the same for the information in the file plan.
Vital Record Indicator	This flag is to allow 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

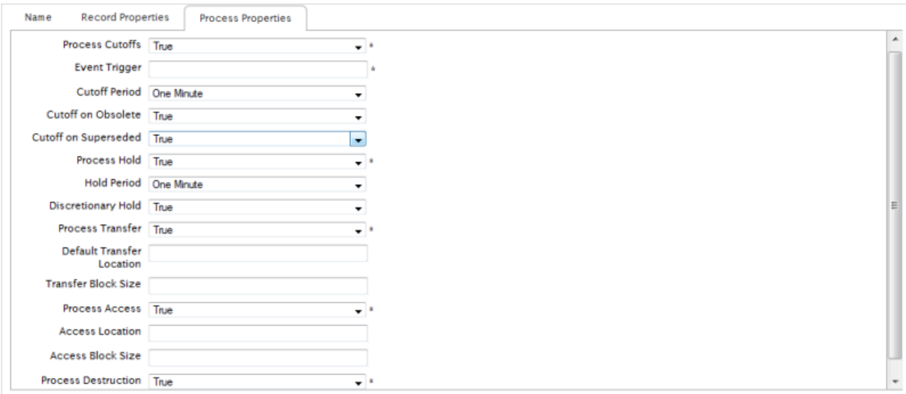


Table 4.19.

Field	Description
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 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.

Field	Description
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 Access	The Boolean data type is flagged when a record, which is held permanently, must be ultimately transferred to the national records authority.
Access Location	The text data type is flagged to specify an area for the access transfer.
Access 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.

2. Fill in the appropriate fields of the tabs in the form.

3. Click **Save** or **Save & Close** to finish.

Create a new Kofax document

1. Follow the instructions in the *Add a new document[73]* section to open the **Add Kofax Document** form.

2. Input a name for a Kofax document in the **Name** field which is required. Special characters (@ # % & * ( ) “ ' : ; [ ] { } / !) are not allowed in this field.

3. Select categories for a Kofax document by clicking .

4. Click **Save** or **Save & Close** to finish.

After being created, a Kofax document will be displayed.

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

Create a new event

1. Follow the instructions in the *Add a new document[73]* section to open the **Add an event document** form.

2. Enter a title for the event.

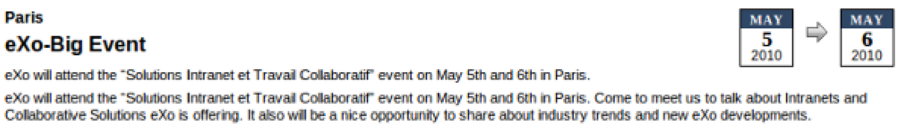
3. Input the location where the event will take place in the **Location** field. Select the **Google Maps** checkbox if you want the location of the event to be shown on Google Maps.

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

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

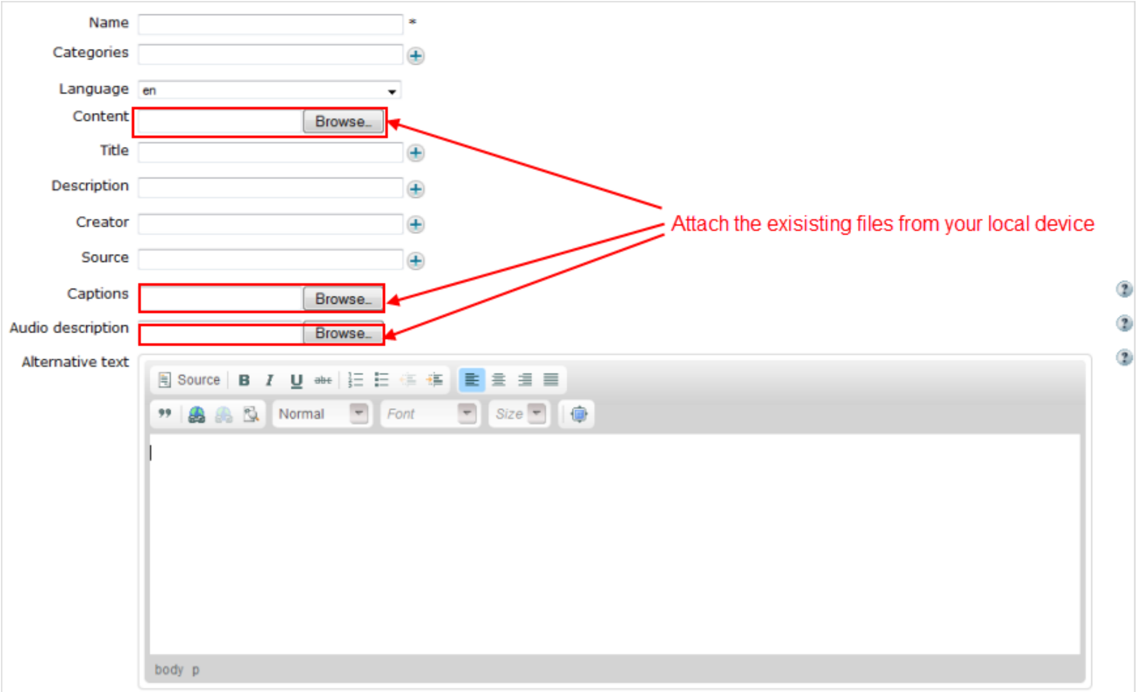
6. Click **Save** or **Save & Close** to finish.

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



Create an accessible media

1. Follow the instructions in the *Add a new document [73]* section to open the content template list, and select the **Accessible Media** template.



Details:

Table 4.20.

Field	Description
Name	The document name which is required. Special characters (@ # % & * ( ) “ ' : ; [ ] {} / !) are not allowed in the **Name** field.
Categories	The name of the selected categories.
Language	The language of the media.
Content	The content of the media which is required.
Title	The display name of the media.
Creator	The creator of the media.
Source	The source of the media.
Captions	Provide the text of the dialogue and important sounds.
Audio description	Provide the narrate track of the media. You can browse and upload another media file from your local device to set it as the audio description.

Field	Description
Alternative text	Provide the descriptive information about the media.

2. Input the information in the fields, and attach existing files from your local device to the following fields:

   - **Content**: It must be a *.flv* or *.mp3* file.
   - **Captions**: It must be a *.srt* or *.mp3* file.
   - **Audio description**: It must be a *.flv* or *.mp3* file.

3. Click **Save** or **Save & Close** to finish.

The accessible media can be played right after being created.

Details:

Table 4.21.

Button	Function
	Stop the media.
 	Play the media. After clicking this button,  will become  and vice versa.
	Play the previous media.
	Play the next media.
	Listen to the audio description. This icon only appears if you attach another media with the audio description to the **Audio description** field. After opening the audio description, to back to the original media, click .

Button	Function
	Activate/Deactivate the media caption. If you attach an *.srt* or *.xml* file to the **Captions** field, the caption will appear when you clicking this button.

Note

You can also attach **Captions** and **Audio description** to the uploaded media when *editing this document*. To know how to upload a file, see the *Attach files to a document [74]* section.

4.6.4.3. Add a folder

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

There are two types of folder:

- Content folder.
- Document folder.

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

File and folder types in a folder

Content folder

- Add a Content folder to a Content one.
- Add a Document folder to a Content one.
- Add documents to a Content folder.
- Upload files (images, MS Word documents, Open Office documents, .pdf files, .txt files, .xml file, and more) into a Content folder.
- Import sub-nodes which were exported into a Content folder.

Document folder

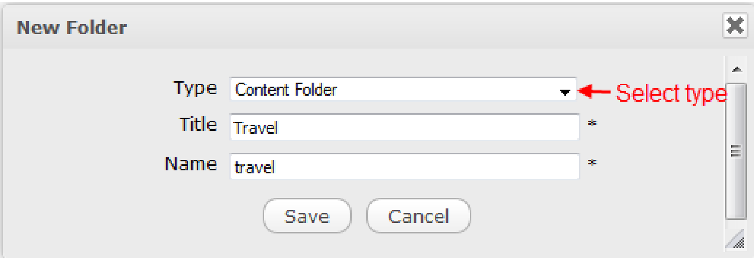
- Add a new Document folder to a Document folder.

- Add File, Podcast, File Plan documents to a Document folder.
- Upload files (images, MS Word documents, OpenOffice documents, .pdf files, .txt files, .xml file, and more) into a Document folder.
- Cannot add a Content folder to a Document folder.
- Cannot import an exported Content folder into a Document folder.
- Cannot import an exported Article, Sample node, Kofax into a Document folder.

Create a folder

1. Select the path to create a folder.
2. Click 

 on the **Action** bar to open the **New Folder** form.



3. Select a folder type.
4. Input values for both **Name** and **Title** fields which are required. Special characters (@ # % & * ( ) " ' : ; [ ] {} / !) are not allowed in these fields.
5. Click **Save** to accept creating a new folder.

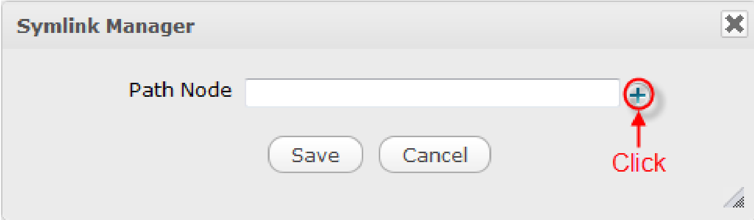
> **Note**
>
> The name of a folder may be the same as that of the existing one. When a new folder is created with the same name as other existing folders, an index will be added to the name of your newly created folder (for example, test[2]).
>
> You can only create a content folder in another content folder.
>
> You can create a document folder in a content folder or a document folder.

4.6.4.4. Add translations to a document

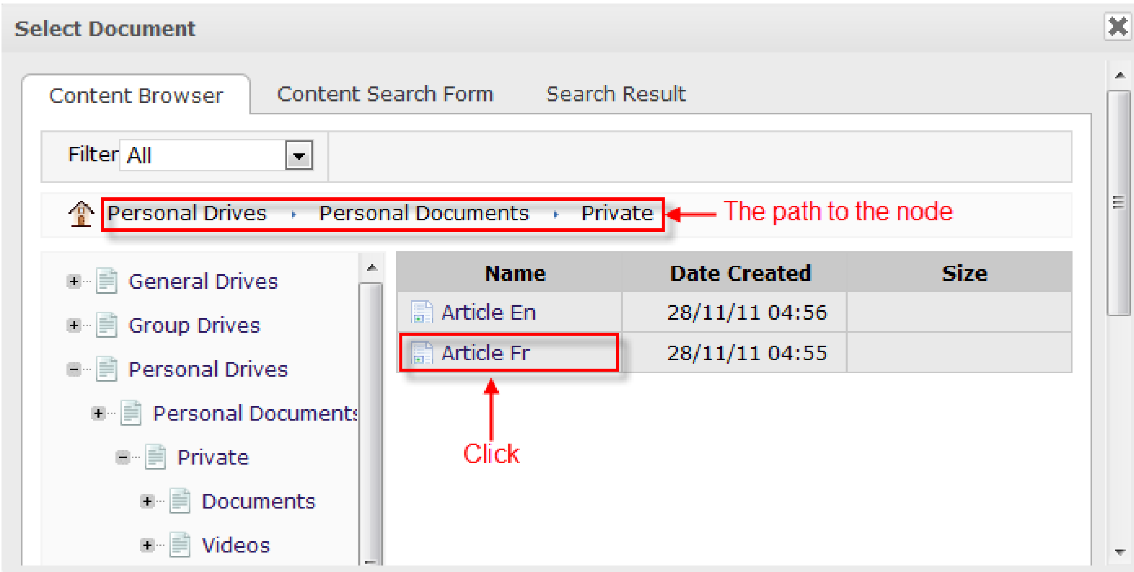
This function enables users to add multiple languages for a document. This action is similar to adding a language.

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

2. Click Add Translation on the **Action** bar to open the **Symlink Manager** form.



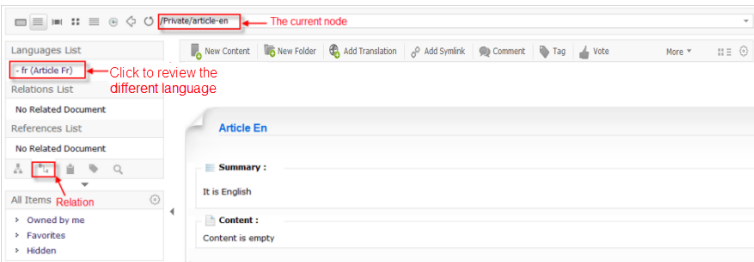
3. Click , then browse to the target document that has different language with the first document. For example, the **Article** version in French.



4. Click **Save** on the **Symlink Manager** form.

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

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



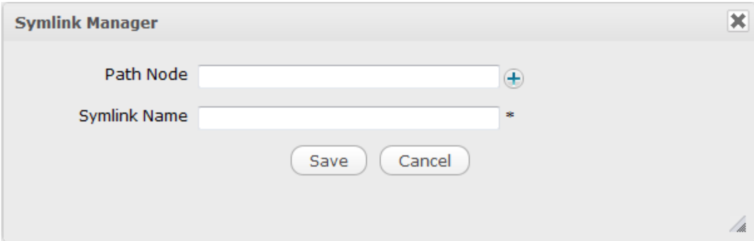
4.6.4.5. Add a Symlink

A symlink in Content works like shortcut to a directory or file. To add a Symlink, you can follow one of these ways.

The first way

1. Select a node where you want to add a Symlink.

2. Click Add Symlink on the **Action** bar to open the **Symlink Manager** form.



Details:

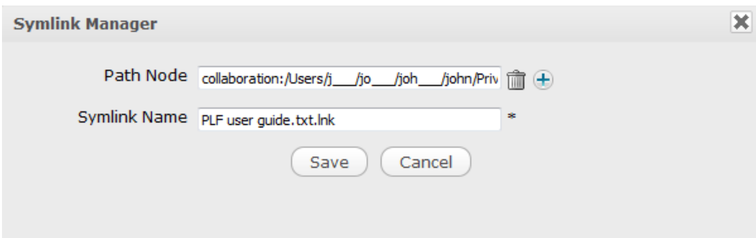
Table 4.22.

Field	Description
Path Node	The path to the target node.
Symlink Name	The name of the Symlink.

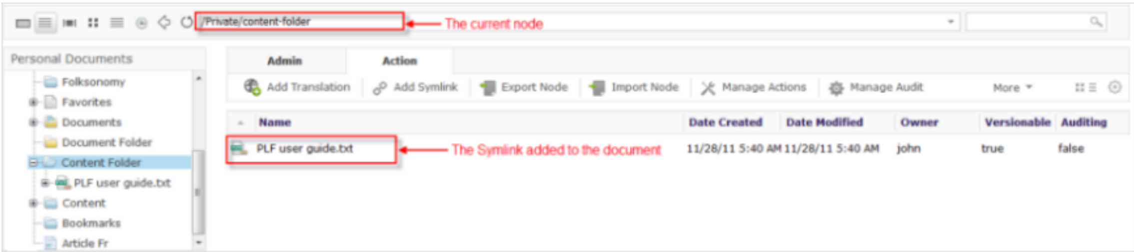
3. Click to open the **Select Target Node** form.

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

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



6. Click **Save** to finish adding a Symlink.

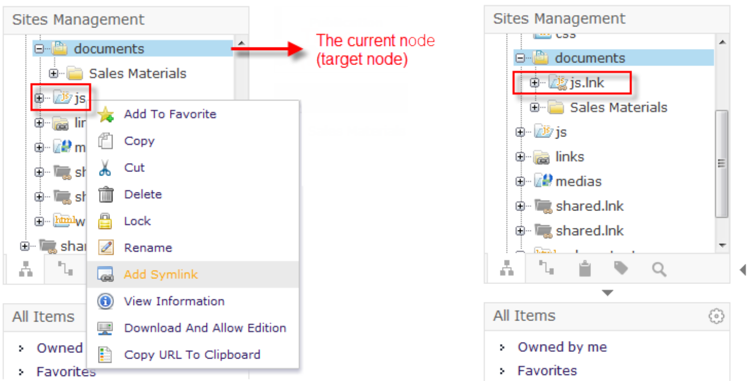


The second way

1. Right-click a node that you want to create a Symlink. Note that if you follow this way, the Symlink will be created to the current node.

2. Click **Add Symlink** from the drop-down menu.

This node will become a Symlink to the current node.



Note

You should notice the different behaviour between adding a Symlink via the **Action** bar and the right-click menu.

- After you have right-clicked a node, then selected **Add Symlink**, a Symlink to the current node is created.
- Meanwhile, when you select **Add Symlink** on the **Action** bar, a **Symlink Manager** form will appear to let you select the target node.

Warning

You will get an error message if you create a Symlink inside the following content types: Article, CSS, Event, HTML, JS, Kofax, Podcast, Sample node, Weblink.

4.6.4.6. Comment

This function is used to comment on a document.

> **Note**
>
> You cannot comment on a **File Plan** document.

1. Select a document to which you want to add your comment.

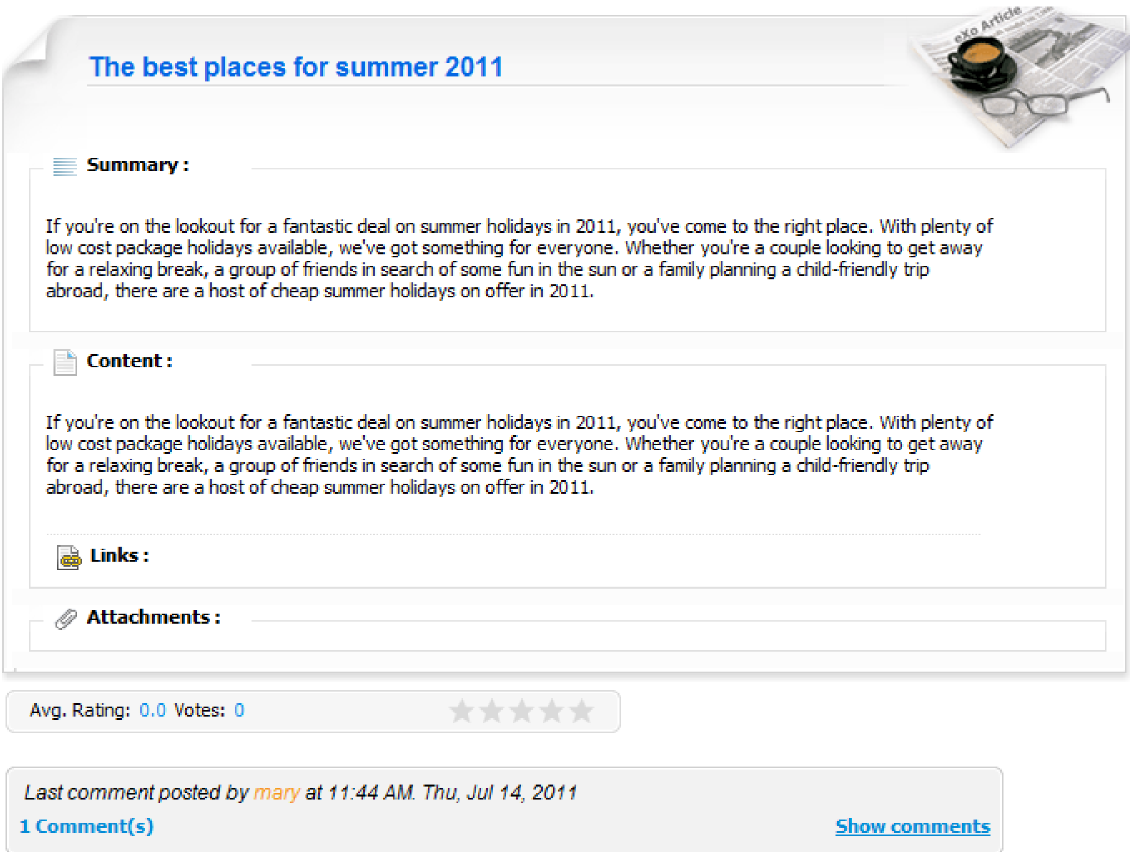
2. Click 

on the **Action** bar to open the **Comment** form.

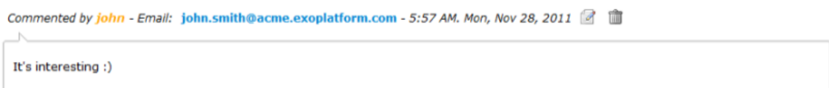
3. Add your comment to the **Comment** field.

4. Click **Save** to commit.

The 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 or delete it by clicking .

4.6.4.7. Edit a document

There are two ways to edit a document.

The first way

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

on the **Action** bar.

The second way

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.

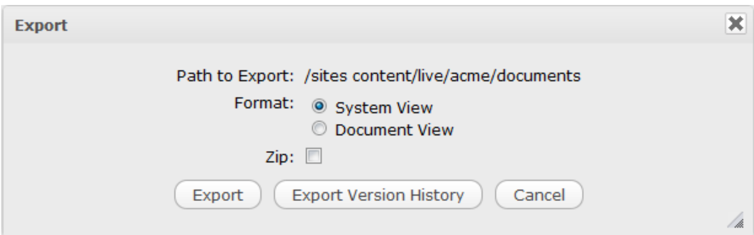
   The form to edit the document will appear. All information of the selected document will be displayed in this form and ready for you to change except the **Name** field.
3. Click **Save** to commit your changes.

4.6.4.8. Export nodes

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

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

on the **Action** bar to show the **Export** form.



Details:

Table 4.23.

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

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

3. Click **Export** and select a location to save the exported file.

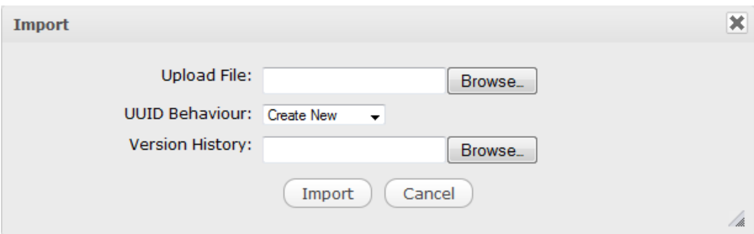
> **Note**
>
> The **Export** form can contain **Export Version History** if the exported node or any of its child nodes is versioned.
>
> This action exports all of the node's version history.

4.6.4.9. Import nodes

Nodes which are in the **.xml** file format can be imported into the JCR Explorer system.

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

2. Click Import on the **Action** bar. The **Import** form appears.



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

4. Select one value from the **UUID Behaviour** drop-down menu, including:

Create New
: If you select this behavior, the imported nodes receive new UUIDs which are completely independent of any existing nodes. As the imported nodes get new UUIDs, there are no UUID conflicts with the existing nodes in the workspace. The existing nodes in the workspace are not moved, modified or deleted. The imported nodes are considered as

new nodes and therefore, do not have a version history. You cannot import a version history for these nodes.

Remove Existing

If you select this behavior, the imported nodes in a selected path receive the same UUIDs of the exported nodes. As the result, there is UUID conflicts with the existing nodes. Therefore, the existing nodes are removed from the workspaces and the new nodes will have the same version history as the existing nodes.

Replace Existing

If you select this behavior, you only can import the exported nodes into their original workspaces where they are exported. When the new nodes are created with the same UUIDs of the existing nodes, causing UUID conflicts with the existing nodes in the workspaces. Therefore, the existing nodes are replaced by the new ones in the same location and the new nodes have the same version history as the existing nodes.

Throw Exception

If you select this behavior, there is a message which will alert that you can not import this node in case this node has been existing in the workspace. If this node hasn't existed, a new node will be created.

5. Click **Browse...** next to **Version History** to select a version to import.

6. Select a format.

7. Click **Import** to import the file's selected version.

4.6.4.10. Manage actions

There are some actions you can perform as follows:

- *Add an action*
- *View an action*
- *Edit an action*
- *Delete an action*

4.6.4.10.1. Add an action

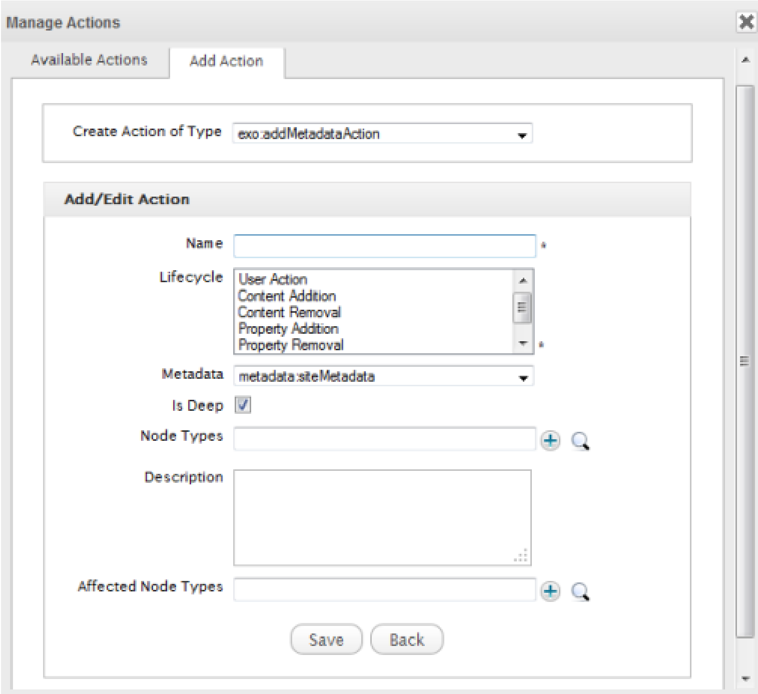
1. Select the node to which you want to add an action.

2. Click 

on the **Action** bar.

   The **Manage Actions** form will appear.

3. Select the **Add Action** tab.



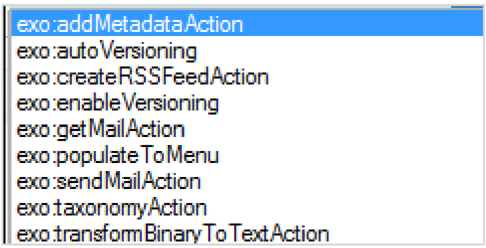
Details:

Table 4.24.

Field	Description
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: • **'User Action':** The action is executed when right-clicking the folder and then selecting the action. • **'Content Addition':** The action will be executed on a new document, but not on a subfolder when the document or the subfolder is created in the folder to which an action has been added. It is also applied to a new document in the subfolder of the folder. • **'Content Removal':** The action will be executed on a document, but not on a subfolder in the folder when the document or the subfolder is moved.

Field	Description
	• **'Property Addition':** The action will be executed on a document when a property is added to the document. • **'Property Removal':** The action will be executed on a document when a property is removed from the document. • **'Property Modification':** The action will be executed on a document when a property of the document is modified. • **'Schedule':** The action is done at specific time. If you need the same action to be executed in several lifecycles, you have to create several actions.

4. Select one type for your action from the **Create Action of Type** drop-down menu.



Details:

Table 4.25.

Field	Description
exo:AddMetadataAction	Add metadata.
exo:autoVersioning	Add a version automatically.
exo:createRSSFeedAction	Create an RSS file.
exo:enableVersioning	Enable versioning.
exo:getMailAction	Fetch mails.
exo:populateToMenu	This type is not supported.
exo:sendMailAction	Send mails.
exo:taxonomyAction	Create categories.
exo:transformBinaryTo TextAction	Convert *.pdf* or *.doc* file types into plain text.

5. Complete all the fields in the form. The **Name** and **Lifecycle** fields are required.

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 auto-added to any child nodes of the selected node.

If an action is added with the lifecycle named 'User Action', it will be applied to the current node. If an action is added with other lifecycles, it will be applied to the child nodes.

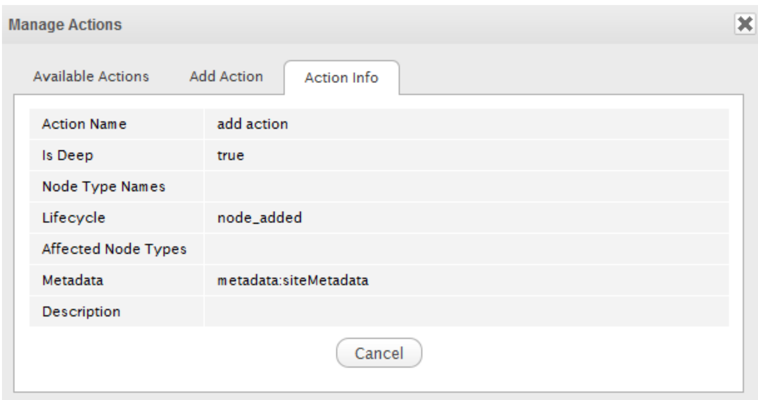
> **Note**
>
> Not all actions are listed in a right-click menu of nodes. Some actions can be performed immediately when that action is added.

4.6.4.10.2. View an action

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

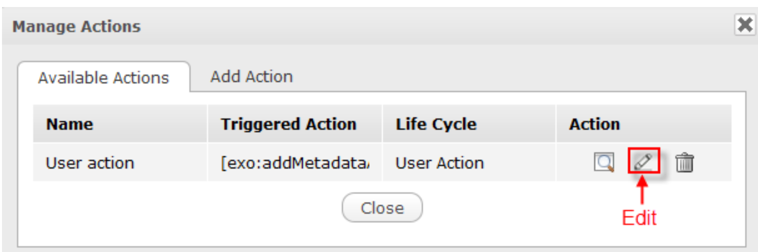
2. Click that corresponds to the action you want to view.

   The details will be displayed in the **Action Info** tab.



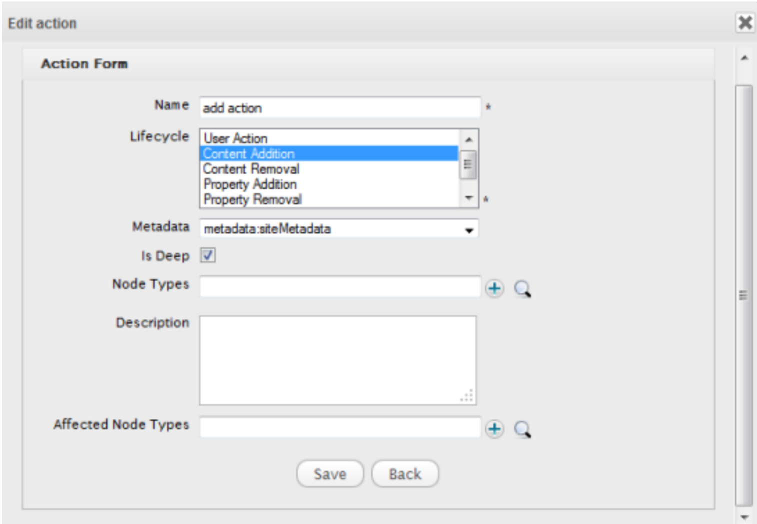
4.6.4.10.3. Edit an action

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



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

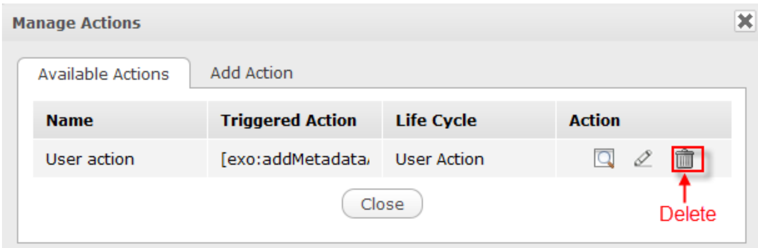
3. Edit properties in the **Action Form.**



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

4.6.4.10.4. Delete an action

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



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

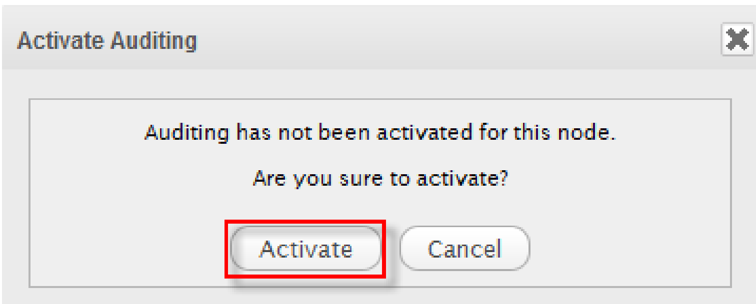
3. Click **OK** in the confirmation message to delete the action.

4.6.4.11. Manage auditing

This function logs property changes in nodes.

1. Select a node.

2. Click Audit on the **Action** bar. The **Activate Auditing** message appears.

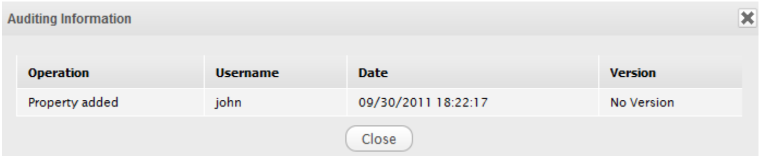


3. Click **Activate** to enable auditing on the selected node.

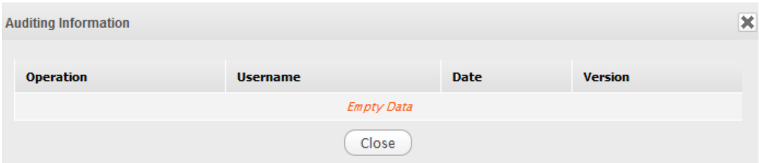
4. Click 

again to view the audit information of the selected node.

   The **Auditing Information** list appears.



   If the node has no audit information, the form will appear as below.

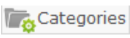


4.6.4.12. Manage categories

Assign a category to a node

You can add categories to the document type nodes only.

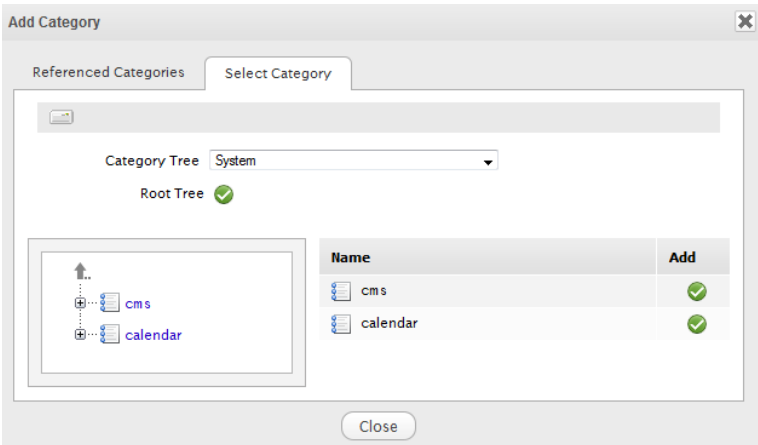
1. Select the node to which you want to add a category.

2. Click 

on the **Action** bar.

   The **Add Category** form appears.

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



4. Click  to add the corresponding category to the node.

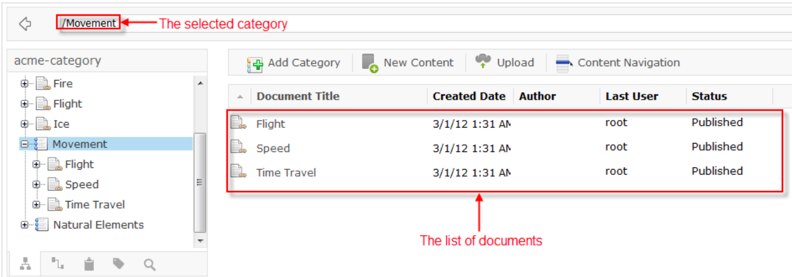
The category, which has been added to a node, is listed in the **Referenced Categories** tab.

All nodes, which belong to a category, can be viewed as follows:

View a category

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

2. Select your desired category. The documents in that category will be listed.



Note

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 is used to preserve the disk space.

Delete a category

1. Select a categorized node.

2. Click Categories.

3. Select the **Referenced Categories** tab.

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

4.6.4.13. Show/Hide content

Nodes can be hidden or shown easily.

Hide a node

1. Select the node you want to hide.

2. Click Show/Hide Content on the **Action** bar to hide the node.

A confirmation message, which notifies that the node has been hidden, will appear.

Show a node

To show a hidden node, click Show/Hide Content again.

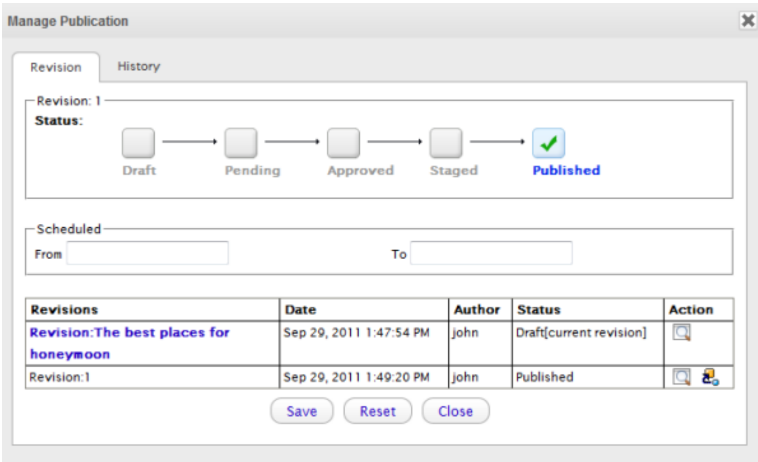
4.6.4.14. Manage publication

This function is used to manage node publication.

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

2. Click Publications on the **Action** bar.

   The **Manage Publication** form appears.



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

3. Click to view the content of the node or click to restore a version (refer to the *Manage versions* section for information about versioning).

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

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

> **Note**
>
> See the *Publication process* section to understand more **Manage Publication.**

4.6.4.15. Manage relations

There are some actions you can perform on relations as follows:

- *Add a relation*
- *Delete a relation*
- *View a relation*

4.6.4.15.1. Add a relation

You can use this function to create relations between nodes.

1. Select the node you want to add a relation to.
2. Click Publications on the **Action** bar.

   The **Add Relation** form appears.
3. Select the **Select Relation** tab to see a list of other documents.
4. Click that corresponds to the documents related to the document selected in the **Step 1.**

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

> **Note**
>
> Relations can only be added to document and uploaded file node types.
>
> A node cannot have a relation to itself.

4.6.4.15.2. Delete a relation

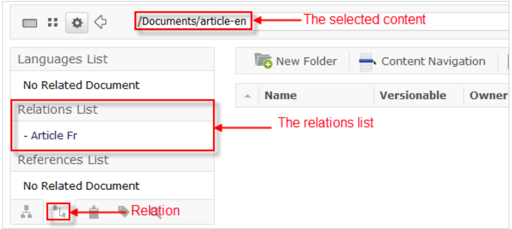
1. Select a node that has links to related documents.
2. Click the Publications button on the **Action** bar.
3. Select the **Relation List** tab to view relations of the selected node.
4. Click corresponding to the relation you want to remove.
5. Click **OK** in the confirmation message to accept your deletion.

   The related document will be removed from the list.

4.6.4.15.3. View a relation

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

2. Click  on the **Filter** bar.



All nodes related to the selected node will be displayed in the **Relations List** in the left pane.

3. Click the name of the related node to view the document.

4.6.4.16. Manage versions

There are some actions you can perform on versions as follows:

- *Add versions to a node*
- *Add/Remove labels for versions*
- *View versions*
- *Restore a version*
- *Delete a version*

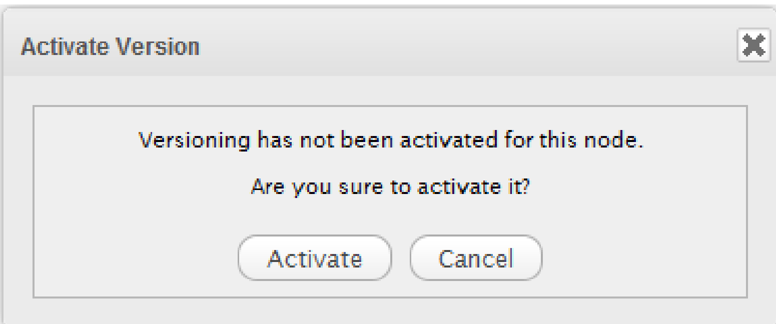
4.6.4.16.1. Add versions to a node

1. Select a node to add a version to.

2. Click 

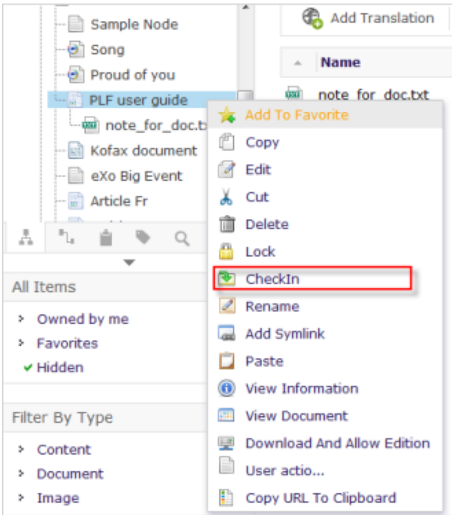
on the **Action** bar.

The following message will appear.

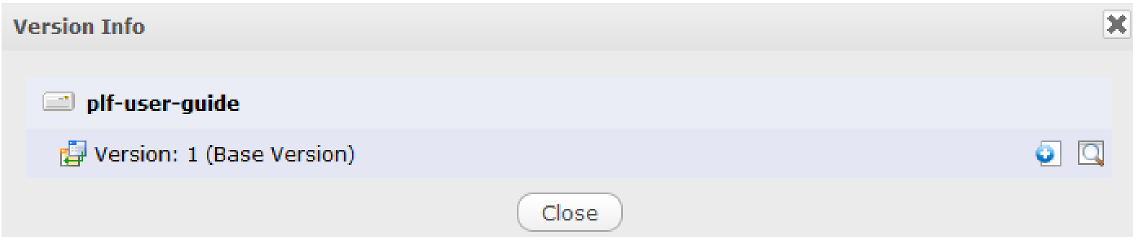


3. Click **Activate** to enable a version for the node.

4. Right-click the selected node and select **CheckIn** from the drop-down menu.



5. Click  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 **CheckOut** to obtain a version of this node.

> **Note**
>
> No actions (copying/cutting/renaming) can be taken on a node in the **CheckIn** status. You must check it out before you can perform any actions on it.
>
> If you want to add more versions to a node, right-click the selected node above and select **CheckIn** and then **CheckOut**.

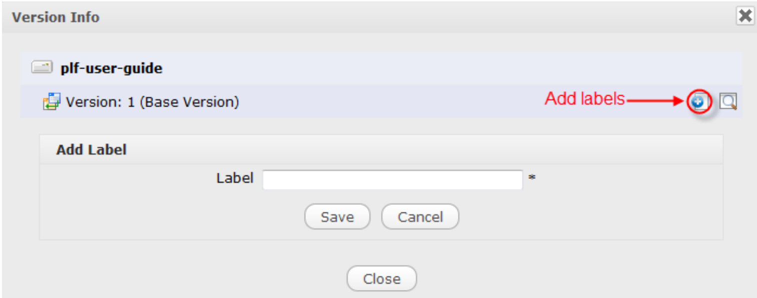
4.6.4.16.2. Add/Remove labels for versions

Add a label

1. Select a versioned node.

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

3. Click  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 without containing any special characters, such as @, #, $.

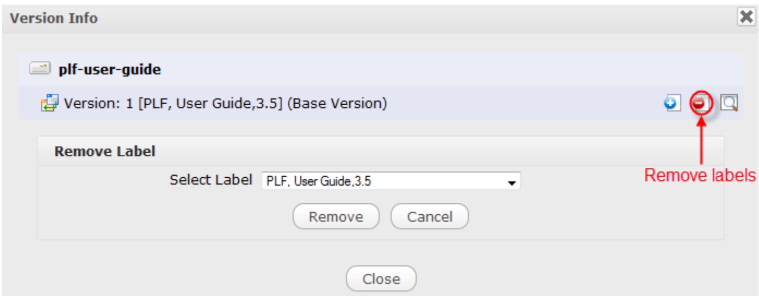
5. Click **Save** to submit the new label.

Remove a label

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

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

3. Click  on the **Version Info** window to show the **Remove Label** field under the versions list.



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

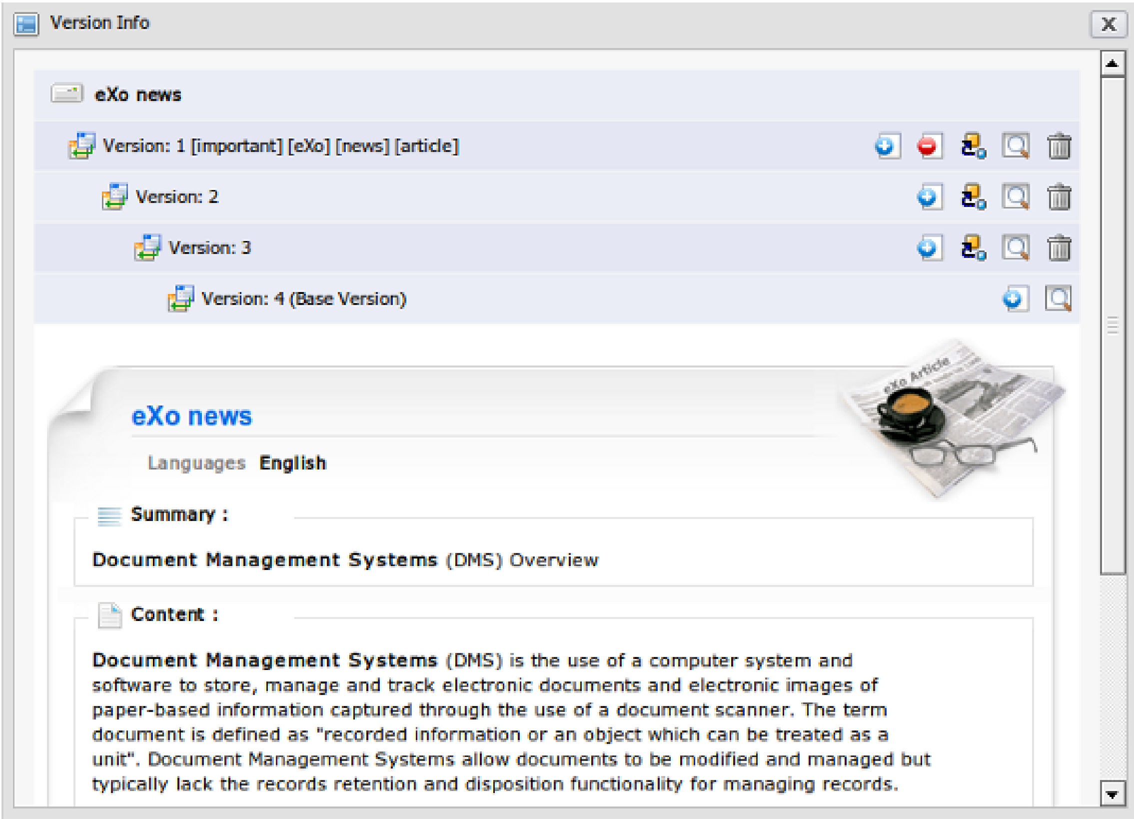
5. Click the **Remove** button to remove the selected label.

4.6.4.16.3. View versions

1. Select a versioned node.

2. Click .

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



> **Note**
>
> Version viewing is not supported on folder nodes.
>
> If you click while the selected node is a folder, a message will appear.

4.6.4.16.4. Restore a version

1. Select a node which has at least two versions stored.
2. Click Versions.
3. Select the version that you want to restore as the base version.
4. Click to restore the selected version.

4.6.4.16.5. Delete a version

1. Select a node which has at least two versions.
2. Click Versions.
3. Click corresponding to the version you want to delete.

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

> **Note**
>
> You cannot delete a base version.

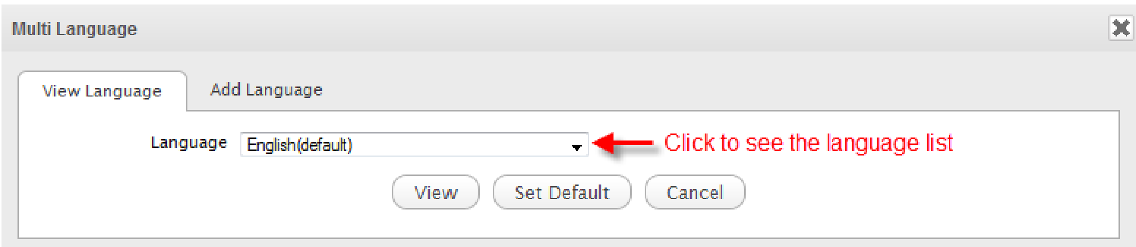
4.6.4.17. Multi-Languages

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

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

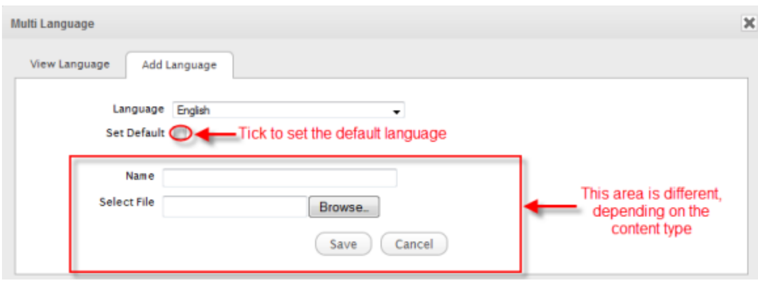
2. Click Add/Edit Localised Content on the **Action** bar.

   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 which file you selected. However, the area where you can add languages to a 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 to the current document, the content field will be blank.

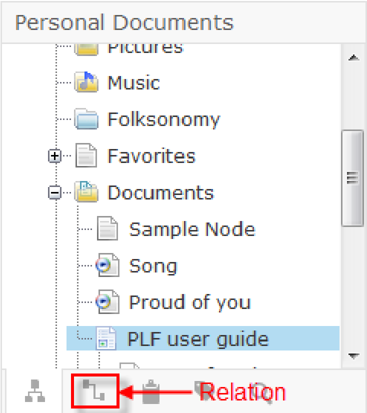
   Select the **Set Default** checkbox if you want to set your selected language as a default language.

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

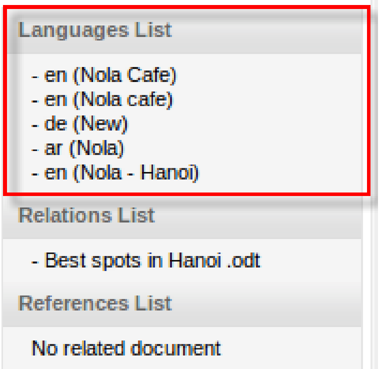
   You can view this document in your newly added language by selecting that language from the **Language** drop-down list, then click the **View** button.

View the languages list of a document

1. Select a document that you want to view the languages list, then click the **Relation** button on the **Filter** bar:



2. The list of language (and all related documents) will be displayed in the left pane.



   You can view the document in the new language by clicking the corresponding link in **Languages List.**

   For more details about **Relations**, refer to the *Views relations* section.

Note

You cannot add multiple languages to a **File Plan** document.

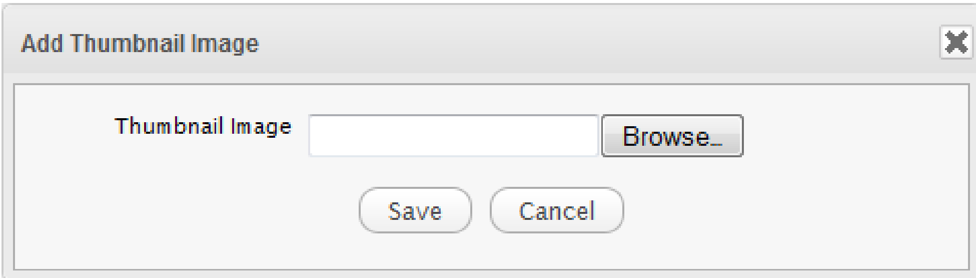
When a document is a sub-node of **File Plan,** you also cannot add language to it.

4.6.4.18. Overload thumbnails

You can overload a thumbnail image for a folder. Overloading allows a folder to be represented by a thumbnail image, rather than a folder icon (see the *Thumbnail view* section).

1. Select the folder you wish to overload with a thumbnail image.
2. Click  on the **Action** bar.

   The **Add Thumbnail Image** form appears.



3. Click the **Browse...** button to select the image which will be used as the display icon for the selected folder.
4. Click **Save** to accept your changes. The node will be stored in an *exo:thumbnails* folder.

4.6.4.19. Request approval

If you want to publish one created content but you do not obtain the 'Publish' right, you must send a request for approving your content.

1. Select the content that you want to send the request for publishing it.
2. Click  on the **Action** bar.

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

4.6.4.20. Approve content

When content is created by users, it is possible to approve the publication if there is an approval request. To approve content, do the followings:

1. Select content that needs approving.
2. Click  on the **Action** bar and the content is ready to be published.

> **Note**
>
> The **Approve Content** button is only visible for users who have the right to approve content.

By default, this button is not displayed on the **Action** bar.

Enable this function by selecting **--> Content --> Content Administration --> Content Presentation --> Manage Views.** See the *Manage views* section to know how to add the **Approve Content** button to the tabs on the **Action** bar in **Sites Explorer.**

4.6.4.21. Publish content

After the content is approved, it can be published by people who have the "Publish" permission.

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

> **Note**
>
> The **Publish** button is only visible for users who have the "Publish" right.
>
> By default, the button is not displayed on the **Action** bar.
>
> Enable this function by selecting **--> Content --> Content Administration --> Content Presentation --> Manage Views.** See the *Manage views* section to know how to add the **Publish Content** button to the tabs on the **Action** bar in **Sites Explorer.**

4.6.4.22. Show drives

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

To show drives, click Show/Hide Drives on the **Action** bar.

To hide drives, click Show/Hide Drives again.

4.6.4.23. Show/Hide content structure

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

Show the JCR Structure

1. Select a document.
2. Click Show/Hide Content Structure on the **Action** bar.

Hide the JCR Structure

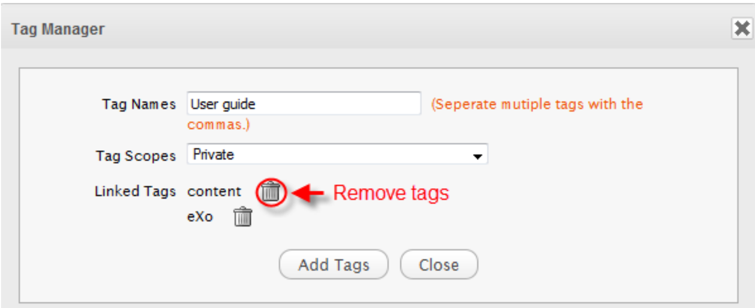
1. Select a document which is showing the JCR structure.
2. Click Show/Hide Content Structure again.

4.6.4.24. Tag documents

A tag is a keyword or term associated with or assigned to a piece of information (a picture, a geographic map, a blog entry, a video clip, and more). Each tag describes one item and enables the keyword-based classification and search of information.

Add a new tag to a document

1. Select a document to which you want to add tags.
2. Click Tag on the **Action** bar. The **Tag Manager** will be displayed.



Details:

Table 4.26.

Field	Description
Tag Names	The tag names that users want to add tags to documents.
Tag Scopes	Classify the tags. There are four tag types: private, public, group, and site. Currently, the two first types are activated ("Private" means that a user who creates tags can view and edit tags; "Public" means that all users can view and edit tags).
Linked Tags	List all tags of a document after the **Add Tags** button has been clicked.

3. Input a value into the **Tag Names** field. Several tags can be added to a document at a time. To do that, input all tag names in the **Tag Names** field and separate by commas.

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 to delete tags.

Remove tags from a document

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

2. Click Tag on the **Action** bar to open the **Tag Manager** form.

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

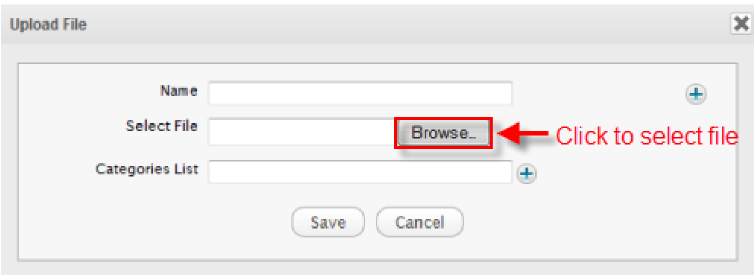
4. Click **OK** in the confirmation message to delete the tags.

4.6.4.25. Upload files into folders

This function allows you to upload a file from your device. All file types can be uploaded. Special characters (! @ $ % & [ ]) are not allowed.

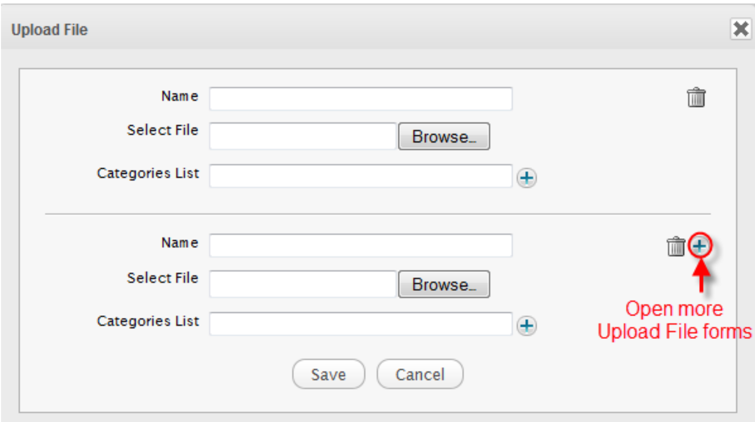
1. Select the folder that you want to upload a file into from the left/right pane.

2. Click Upload on the **Action** bar to open the **Upload File** form.



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

   If you want to upload multiple files at the same time, click to open more **Upload File** forms.

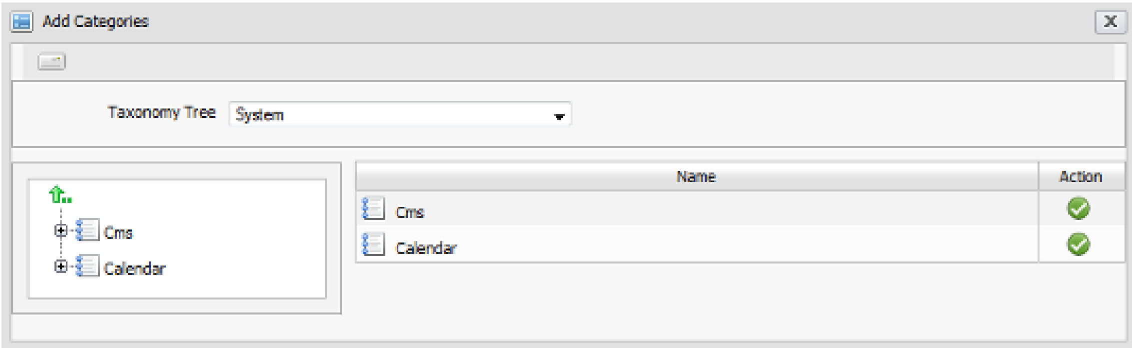


Click to close a **Upload File** form.

To change the uploaded file, click in the **Select File** field and select **Browse...** again to select another one.

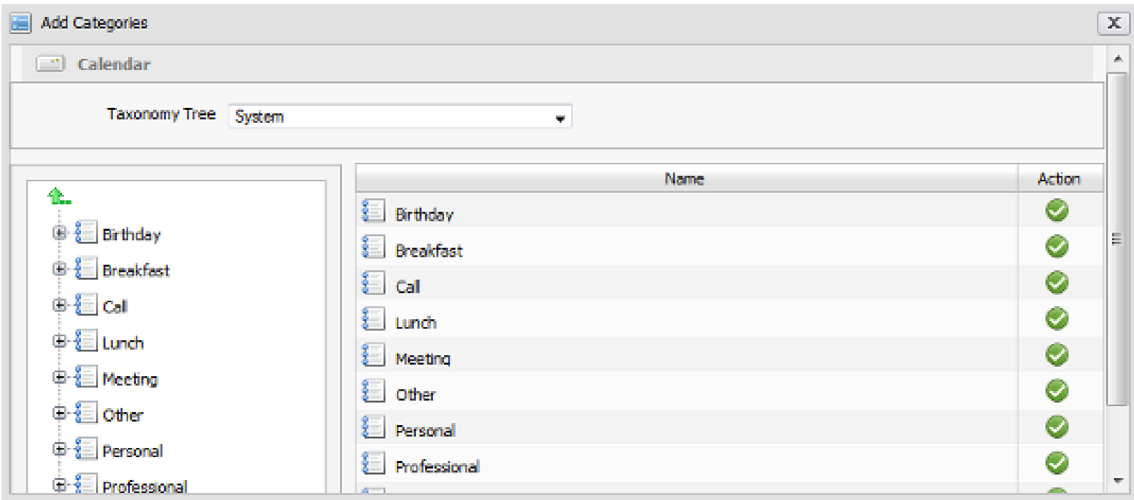
4. Optionally, type a name in the **Name** field which is not required. Special characters (! @ $ % & [ ]) are not allowed in this field. If not, the name of the uploaded file will be kept as original.

5. Click next to the **Categories List** field to select categories to which you want to add this file.



i. Select a category in the left pane to open its child nodes in the right pane.

ii. Click corresponding to a child node that you want.



Note

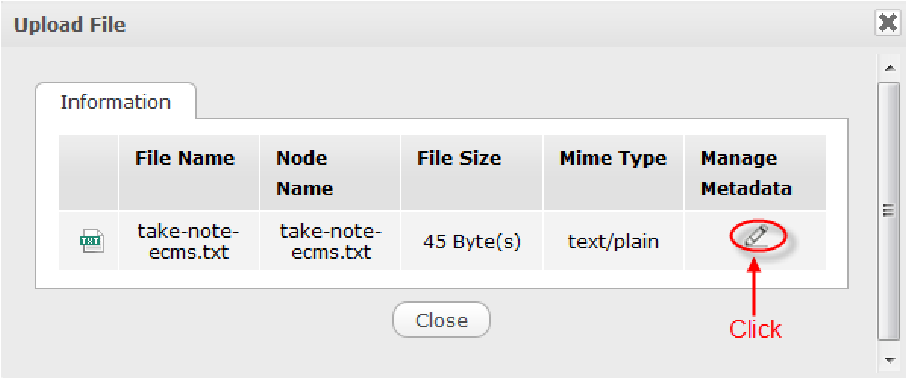
You can add more categories to a file by clicking again to open the **Add Categories** form.

Click to delete a category in **Upload File** form.

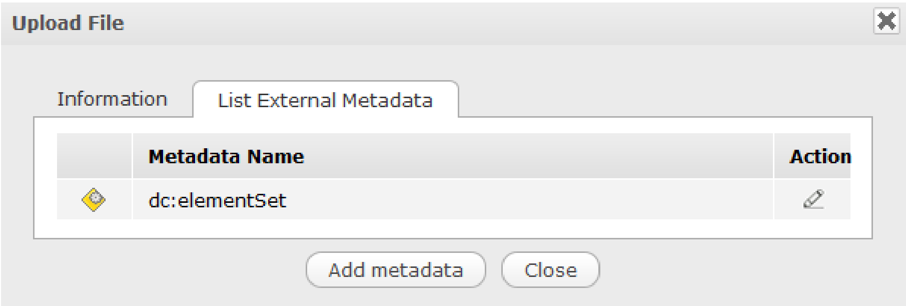
> You also manage categories which have been added to files by using the **Manage Categories** function. See the *Manage categories* section.

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

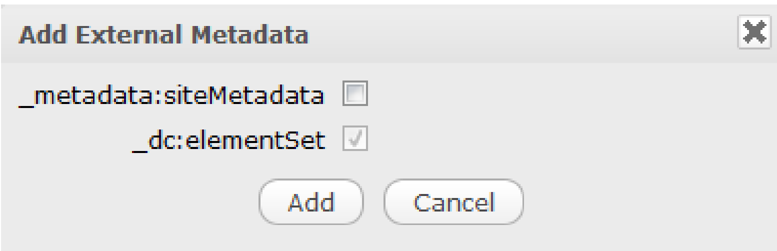
   After being saved, the main information of the uploaded file will be displayed.



7. Optionally, click to see more details about its external metadata information. The **List External Metadata** tab will be enabled and you can do some actions in this tab.



- Click corresponding metadata that you want to edit.
- Click **Add metadata** to add more metadata to the uploaded file. Then, tick the checkbox, and click **Add.**



   The new metadata are displayed in the **List External Metadata** tab.

8. Click **Close** to quit the **Upload File** form.

   After being uploaded, the tree is displayed in the left pane.

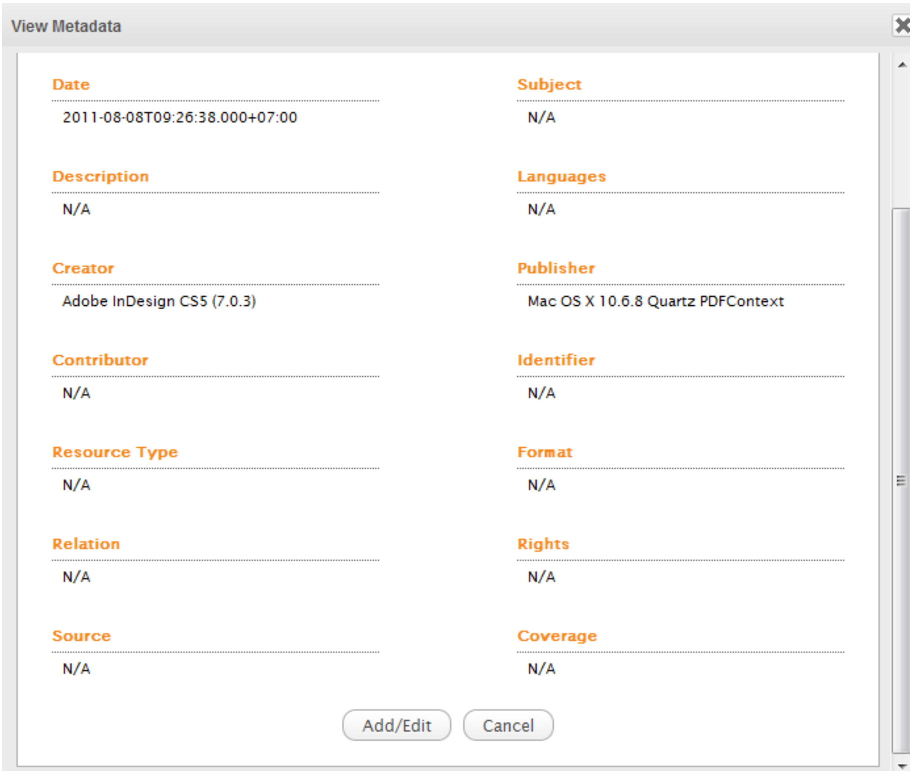
> **Note**
>
> The size of the uploaded file depends on the size limit of the uploaded file that you set up in the 'Edit' mode of **Sites Explorer.** If your file size exceeds the limit, the alert message will appear.

4.6.4.26. View metadata

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

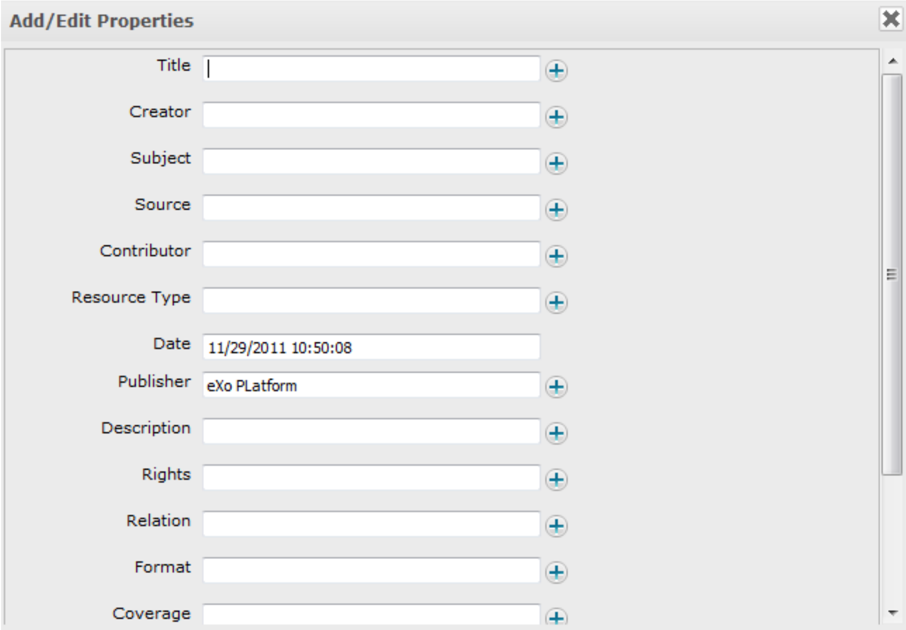
1. Select an appropriate node (**nt:file**).

2. Click Metadata. 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 to add further metadata.



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

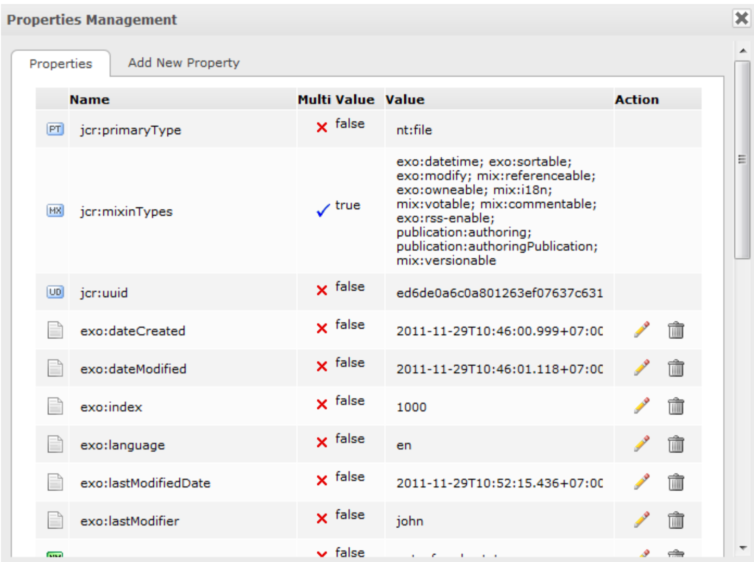
4.6.4.27. View node types

This function allows you to view the detailed information of a node.

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

2. Click 

to view detailed information about the selected node.



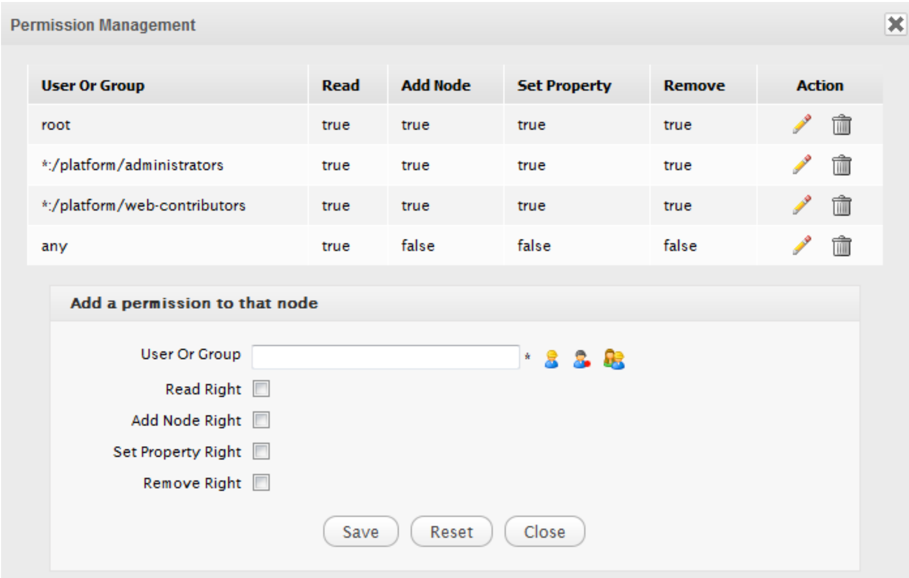
3. Click the tabs at the top of the form to view categorized information.

4.6.4.28. View permissions

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

1. Select a node.

2. Click Permissions. The **Permission Management** form appears.



By opening the **Permission Management** form, you can perform the following actions:

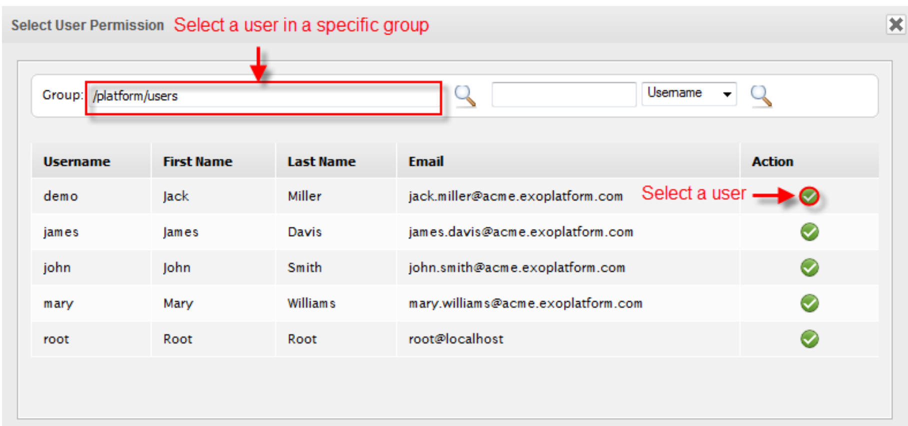
- *Add permissions [118]*
- *Edit permissions [120]*
- *Delete permissions [120]*

Add permissions

1. Select a user or a group to whom you want to assign permissions.

   - Click next to the **User Or Group** field to add permission for a specific user.

     The **Select User Permission** form appears.

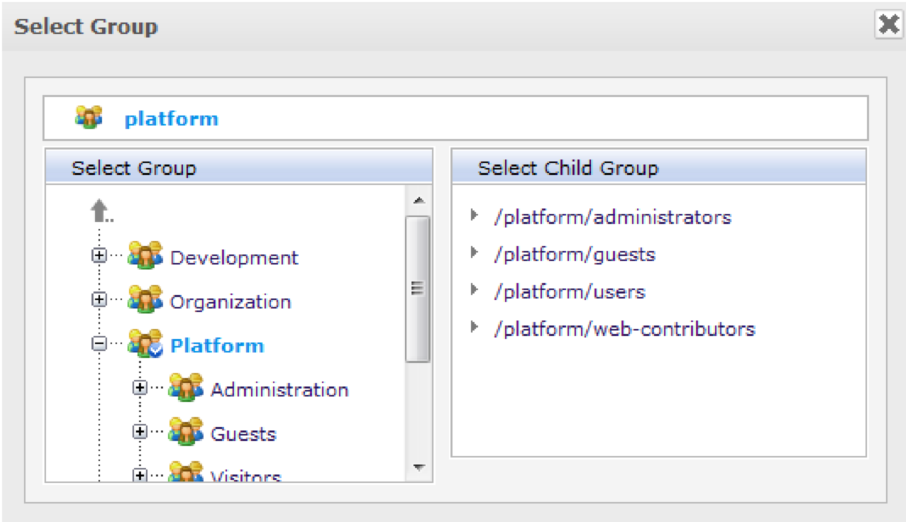


Click corresponding to your desired user. Also, you can use the **Search** function to look for your desired users quickly.

Search for users

Search for a user in a specific group

- Enter a group name in the **Group** field at the top of the form (for example, **/platform/users**). Then press **Enter**. All users in the nominated group will be displayed.
- Or, click beside the **Group** field to open a form that lists groups and their sub-groups. Select a sub-group and all users of the sub-group will be displayed.



Search for a user in any groups by Username, First Name, Last Name, or Email

- Enter the information of the user ino the textbox.
- Click to search for users matching with your selected information.

- Click next to the **User Or Group** field to add permissions based on memberships.

  Then, select a group in the left pane, and membership types in the right pane in the **Select Membership** form.

- Click next to the **User Or Group** field to assign the "read" permission to all users/groups.

2. Select the permission you want to grant the selected users or groups by ticking the corresponding checkboxes beside rights you want to add.
3. Click **Save** to accept your changes. The new permissions will appear in the permissions table above.

Edit permissions

1. Select the permission of a user or a group in the permissions table.
2. Click .
3. Change the permissions as desired.
4. Click **Save** to accept your changed permissions.

Delete permissions

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

4.6.4.29. View properties

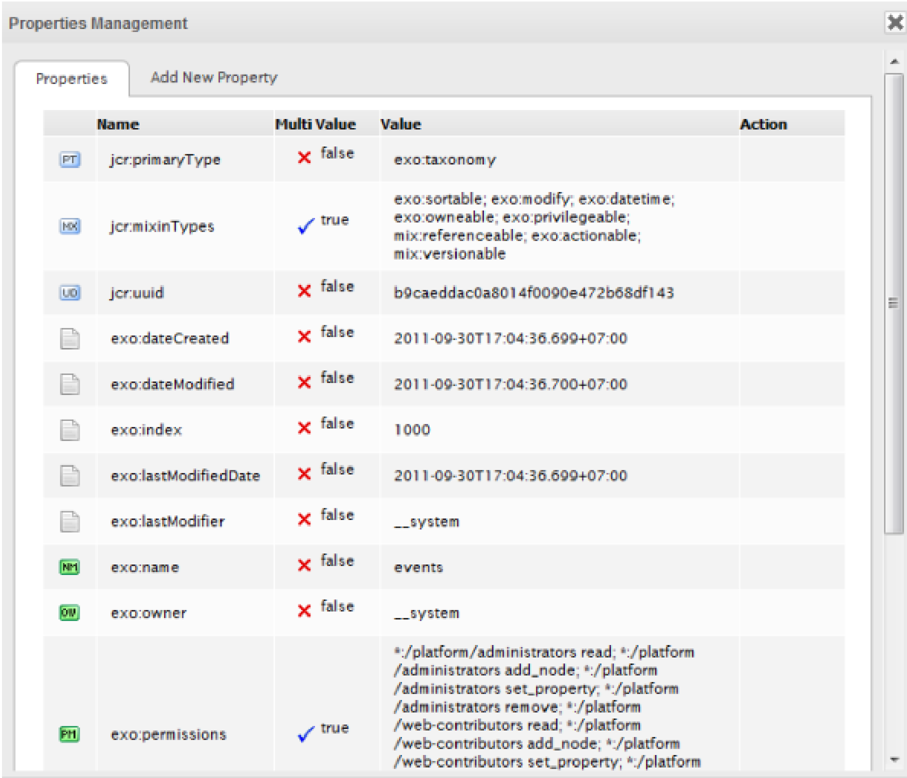
This function allows users to review all the properties and values of a node. It can also be used to add values to a node.

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

to show the **Properties Management** form.

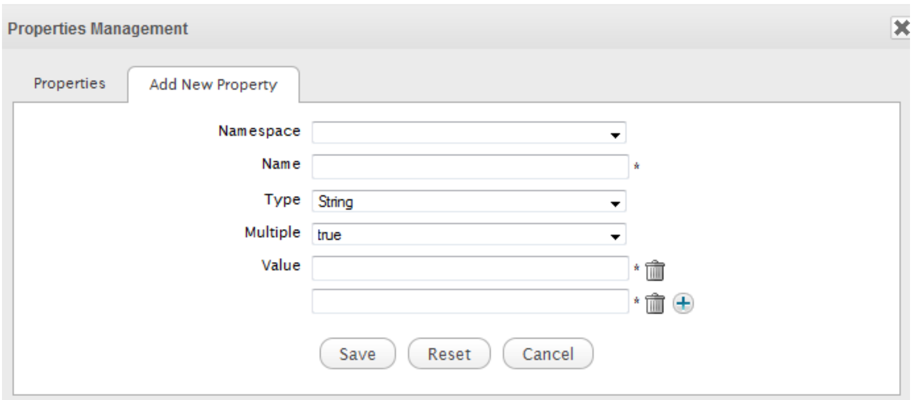
   This form has two tabs:

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



Add New Property

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



3. Select the **Add New Property** tab to add new properties to the selected node.
4. Select the namespace for the property.
5. Enter a name for the new property in the **Name** field.
6. Select the property type from the **Type** drop-down menu.
7. Enter a value for the property in the **Value** field.

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

   To remove a value, click .

8. Click **Save** to accept your new values, or **Reset** to clear all modified fields.

After you have made changes on new properties, you will be returned to the **Properties** tab. The newly added values will be displayed.

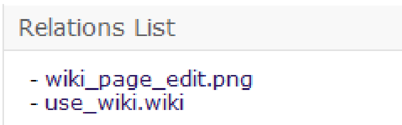
In this form, you can edit a property by clicking , or delete it by clicking .

4.6.4.30. View a relation

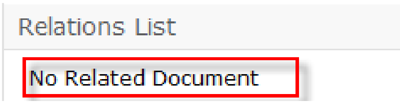
This function shows/hides documents related to a selected node.

- ***View a relation***

  Select a node, then click  . Documents related to the selected node will be shown in the **Filter** bar.

  If the node does not have any related documents, the message **No Related Document** will appear instead.

- ***Hide relations***

  Click  again to hide relations.

4.6.4.31. Vote for a document

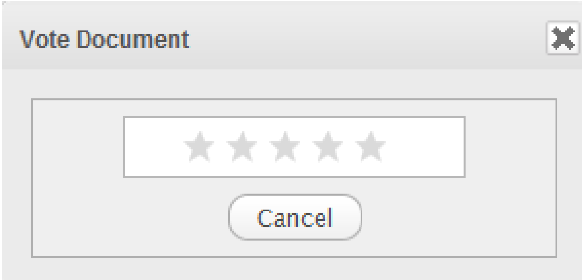
This function is used to vote for a document.

> **Note**
>
> You cannot vote for a **File Plan** document.

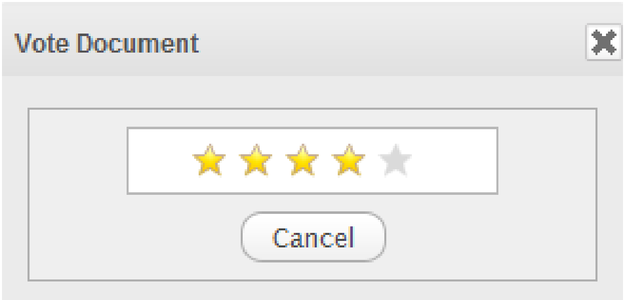
1. Open the document you want to vote for.

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

The **Vote Document** form will appear.



3. Rate the document by clicking the appropriate star level.



After a vote has been added, the rating will appear at the bottom of the document:

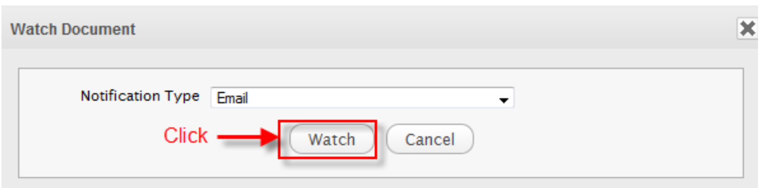
4.6.4.32. Watch/Unwatch documents

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

Watch a document

Select the document you want to watch and click .

The **Watch Document** form will appear. Click the **Watch** button to finish.



Stop watching a document

Select the document and click .

A message will appear to confirm the action.

4.6.5. Manage content in Sites Explorer

Web content is a key resource which is used for 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 web content in a specific site.

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

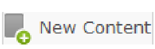
4.6.5.1. Create new web content

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

1. Go to the **Sites Management** drive, then select a site to which you want to add web content.

2. Select the **web content** folder on the left.

   > **Note**
   >
   > In this step, you also can add new web content into another folders (documents and media folders) of a site but you are recommended to select the **web content** folder because:
   >
   > Managing web content of a site becomes more easily.
   >
   > You only may add new web content in this folder so that you do not need to select web content document in the list of document types. It makes adding new web content more flexibly.

3. Click 

 on the **Action** bar to open *a list of content templates[46]*, including **Free layout web content**, and **Picture on head layout web content**.

4. Select a template to present the web content by clicking one.

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

6. Click **Save** or **Save & Close** to save the content or **Close** to quit the **Add New Document** form.

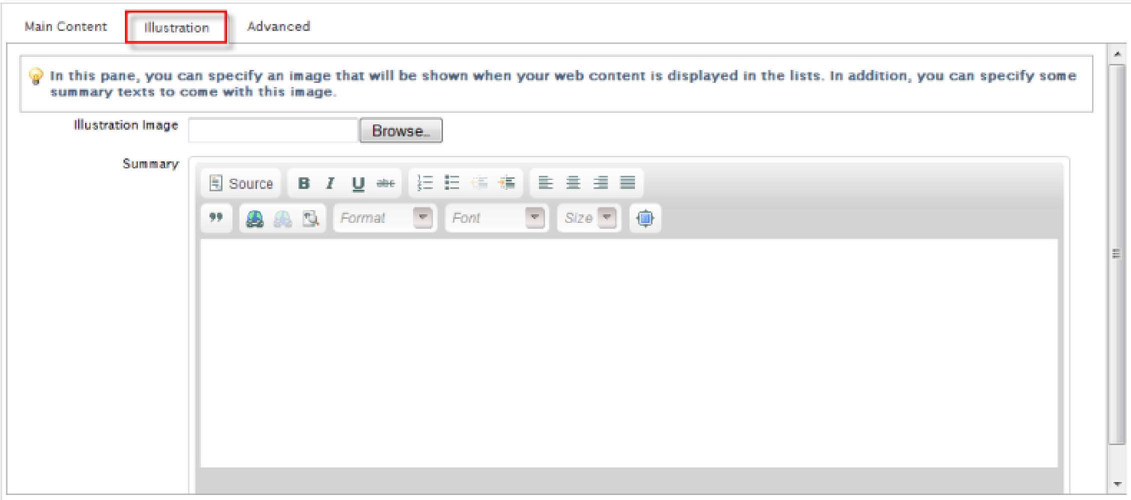
Tabs in the Add New Document form

The **Main Content** tab

Table 4.27.

Field	Description
Title	The title of the web content.
Name	The name of the web content that you want to add new.
Language	The language of the web content. At present, eXo Platform 3.5 supports two languages: English and French.
Main Content	The main content that you want to display when publishing this web content.

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



Details:

Table 4.28.

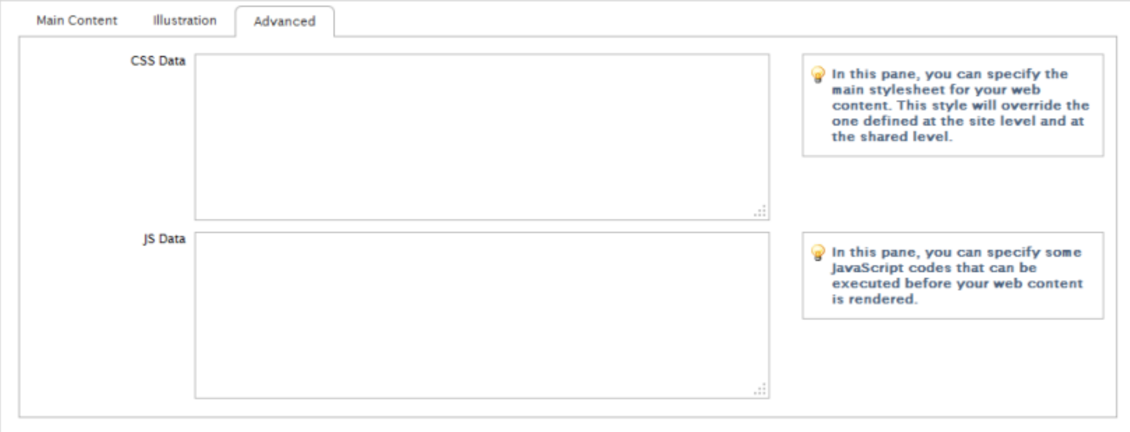
Field	Description
Illustration Image	The path to an image that you want to upload into a site. This image will be used like an illustration of that site.
Summary	You can give a short description about the web content because it will be displayed with the illustration image when the web content is listed. The main content will be shown when it is selected to be viewed.

Upload an image

1. Browse a list of images on your local device by clicking the **Browse...** button, then select a specific location.

2. Select an image in the list to upload.

The **Advanced** tab includes two parts: CSS Data and JS Data.



Details:

Table 4.29.

Field	Description
CSS Data	Contain the CSS definition to present data in the web content. You can optionally enter CSS data into this field to specify the style.
JS Data	Contain the JS content to make the web content more dynamic after being published. You can optionally enter the JS content in this field.

4.6.5.2. Edit web content

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

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 in the left tree or in the right pane. The detailed information of web content will be viewed in the right pane.

3. Click 

on the **Action** bar to show the form to edit the selected web content. This form is similar to that of creating a new document.

4. Make changes on current values in the fields of this form.

5. Complete editing the selected web content by clicking **Save** or **Save & Close.**

> **Note**
>
> When you click , the web content will be auto-locked for your editing. After finishing, the content is back to the unlock status. You can manage "Locks" in the *Unlock a node [215]* section.

4.6.5.3. Delete web content

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

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

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

4.6.5.4. Publish web content

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

See the *Publication process* section to know how to publish web content.

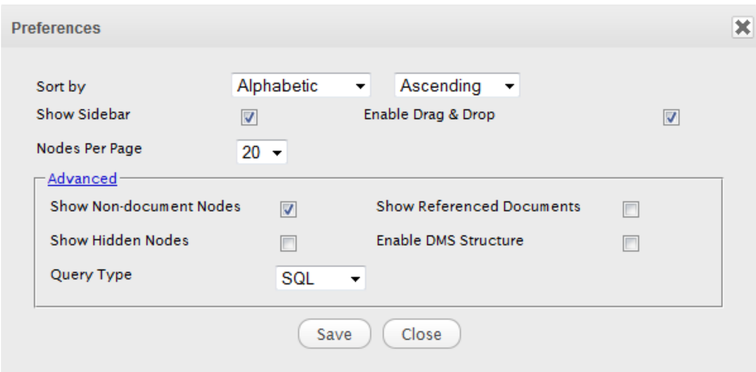
After the content is published, all users who have the right to access that position can view the published web content as a page on the **Navigation** bar.

4.6.5.5. Preferences

This function is used to set up your browsing preferences.

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

   The **Preferences** window will appear.



Details:

Table 4.30.

Field	Description
Sort by	Sort nodes in the nodes list by Alphabetic, Type, Created Date, or Modified Date.
Show Sidebar	Display/Hide the sidebar.
Enable Drag & Drop	Enable/Disable the "drag and drop" action.
Nodes Per Page	This number of nodes displayed per page.
Show Non-document Nodes	Display/Hide nodes that are non–documents.
Show Referenced Documents	Display/Hide referenced documents.
Show Hidden Nodes	Display/Hide hidden nodes.
Query Type	This query type.
Enable DMS Structure	Display/Hide document nodes in the tree structure.

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

   Or, click **Close** to quit without submitting changes.

4.6.5.6. Search in Sites Explorer

There are 3 search types in **Sites Explorer**:

- *Quick search*
- *Advanced search*
- *Search with saved queries*

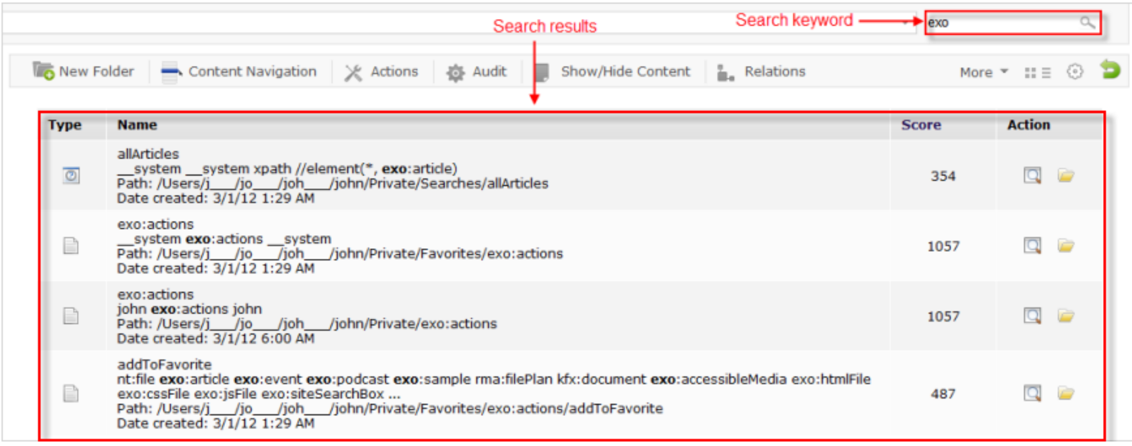
4.6.5.6.1. Quick search

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

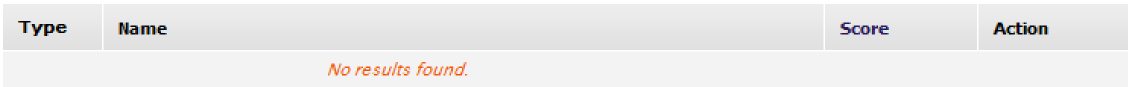
1. Enter a keyword into the search text box.
2. Click to perform the search;

   Or, press **Enter**.

   The search results will be displayed in the right pane.



The search results are empty if no document contains the search string.



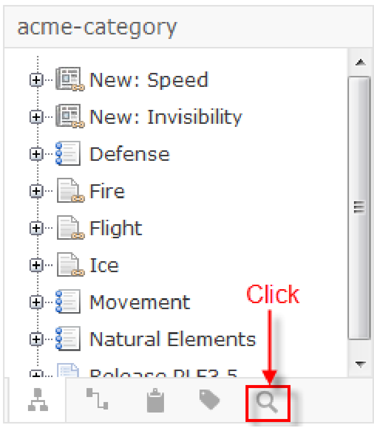
3. Click to view the content containing the keyword;

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

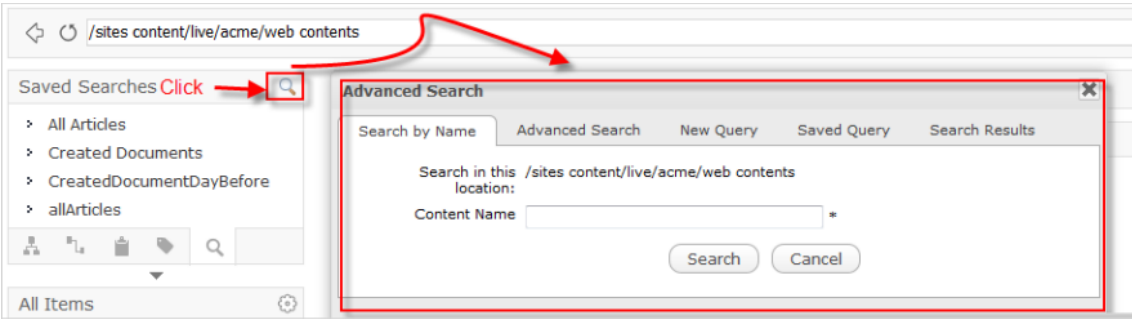
4.6.5.6.2. Advanced search

Perform an advanced search

1. Click on the **Filter** bar.



2. Click to open the **Advanced Search** form.



The tabs in this form offer different search functions:

- *Search by Name*
- *Search with constraints*
- *Search by creating a new query*
- *Search by existing queries*

4.6.5.6.2.1. Search by Name

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

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

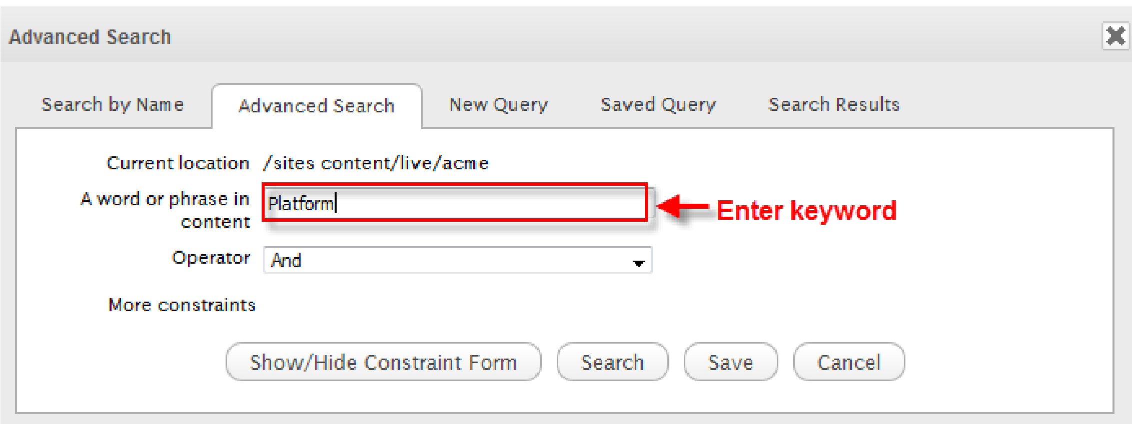
   Results will return with the message *"No result found"* if there is no node with the entered name.

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

4.6.5.6.2.2. 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.

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

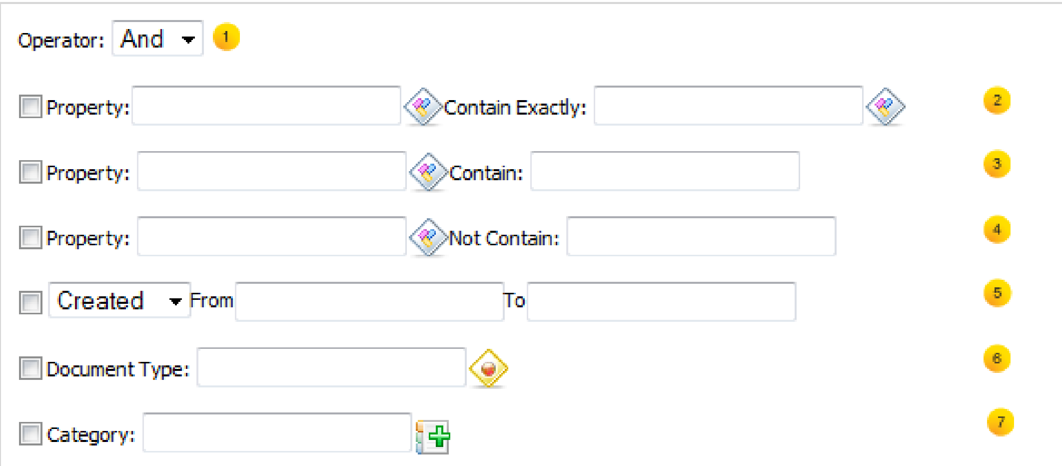
2. Select the **Operator**.

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

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

3. Click **Show/Hide Constraint Form** to add more constraints.

   A further constraint options window will appear.



Details:

Table 4.31.

Item	Description
1	You can add more than one constraint with either of two operators (AND and OR).
2	Add a constraint to search by a property with specific values.
3	Add a constraint to search by a property that contains one of the word in the specific string.
4	Add a constraint to search by a property that does not contain the specific string.
5	Add a constraint to search by a duration of date (created, modified).

Item	Description
	Add a constraint to search by a document type, including File, Article, Podcast, Sample node, File Plan, Kofax).
	Add a constraint to search by categories.
	Add a document type.
	Add a category.

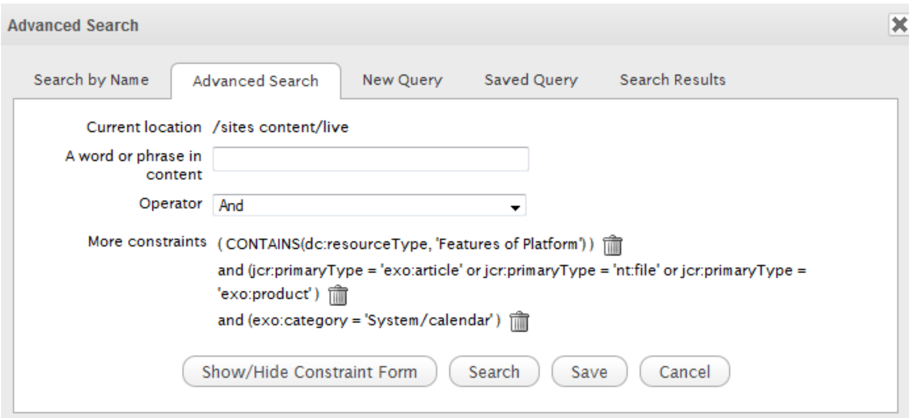
4. Select the constraint operator (**AND/OR**).

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

   - *Add a constraint for exact values [133]*
   - *Add a constraint including or excluding values [134]*
   - *Add a constraint by date [135]*
   - *Add a constraint by document type [135]*
   - *Add a constraint by category [136]*

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 by clicking .

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

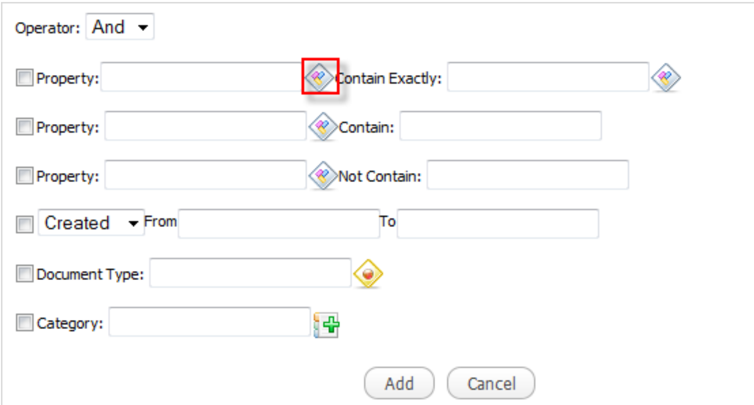
8. Click **Save** and put a name for this search configuration if you want to save it to use at another time.

There are some methods to add the required constraints as follows:

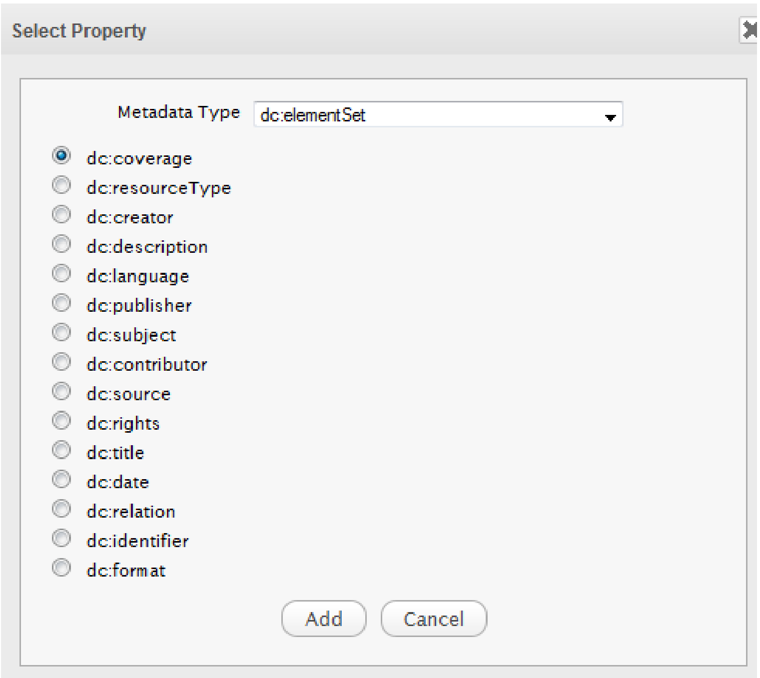
Add a constraint for exact values

1. Tick the checkbox that corresponds to the constraint you want.

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

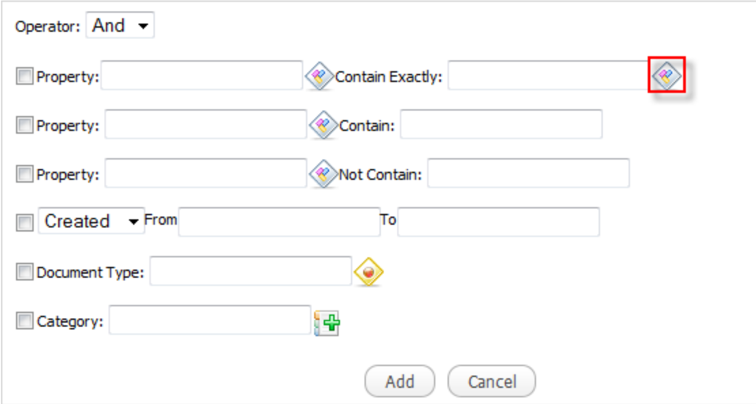


A list of possible properties appears.

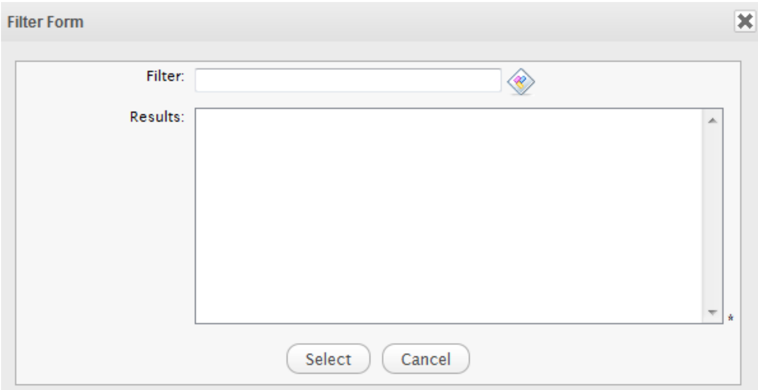


3. Select a property from the list and click **Add**. The selected property will populate **Property** field.

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

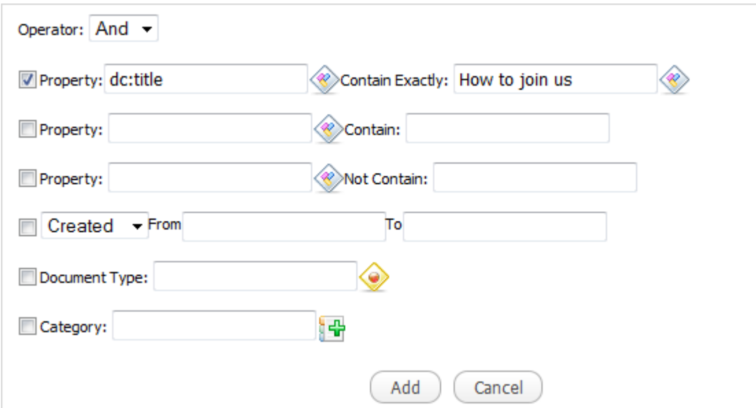


The **Filter Form** will appear.



All pre-existing values for your selected property 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 value will populate the **Contain Exactly** field of the constraints form.



Add a constraint including or excluding values

1. Tick the checkbox corresponding to the **Contain** or **Not Contain** constraint, as appropriate.

2. Enter the required property in the **Property** field, or click (refer to **Step 2** in the *Add a constraint for exact values [133]* section for more information).

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

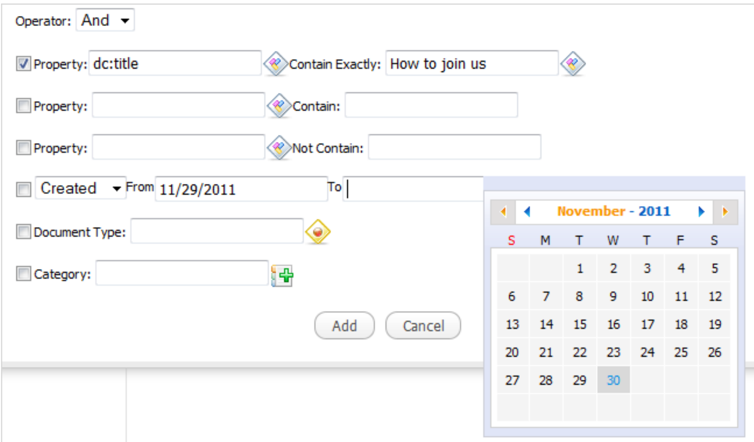
Add a constraint by date

1. Tick the checkbox 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.

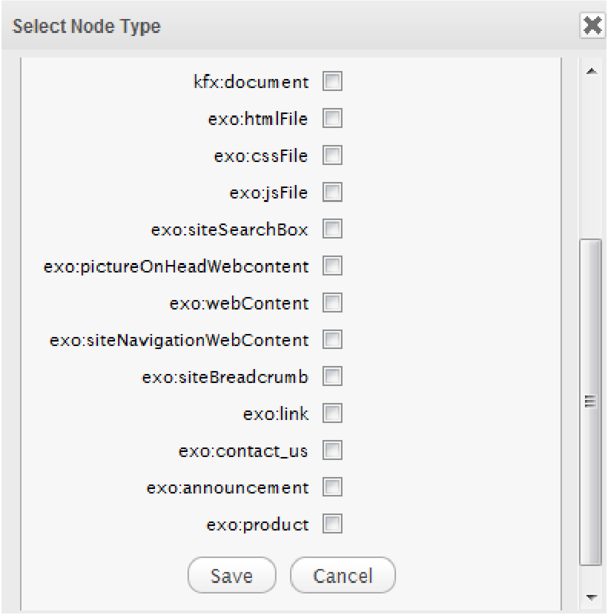
4. Repeat the above steps for the **To** field.

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

Add a constraint by document type

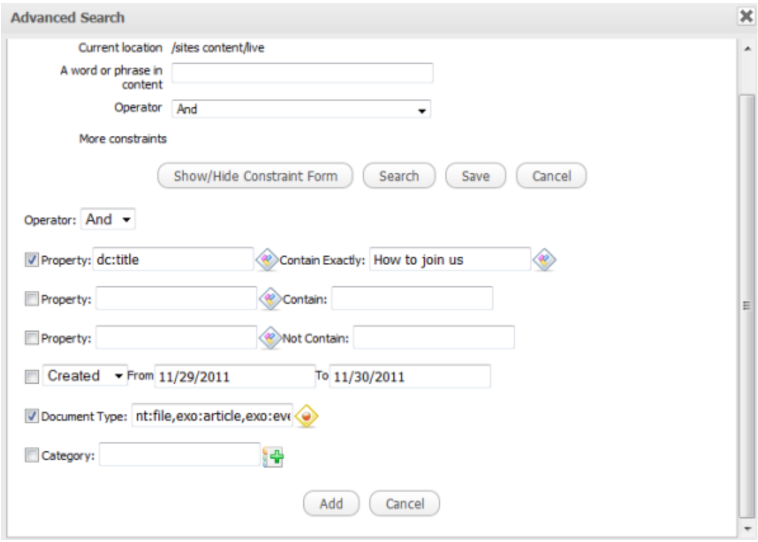
1. Tick the checkbox beside the **Document Type** field.

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



3. Tick the checkbox corresponding to your desired document type, then click **Save**.

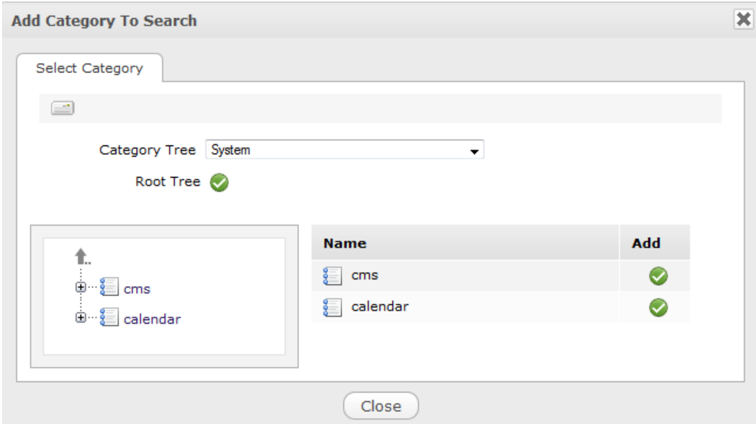
   The selected document type will populate the **Document Type** field.



Add a constraint by category

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

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



3. Click ✔ that corresponds to your desired category.

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

4.6.5.6.2.3. Search by creating a new query

You need a knowledge of the structure of query statements 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. Select a query type from the drop-down menu: **SQL** or **xPath**.

3. Enter a query statement.

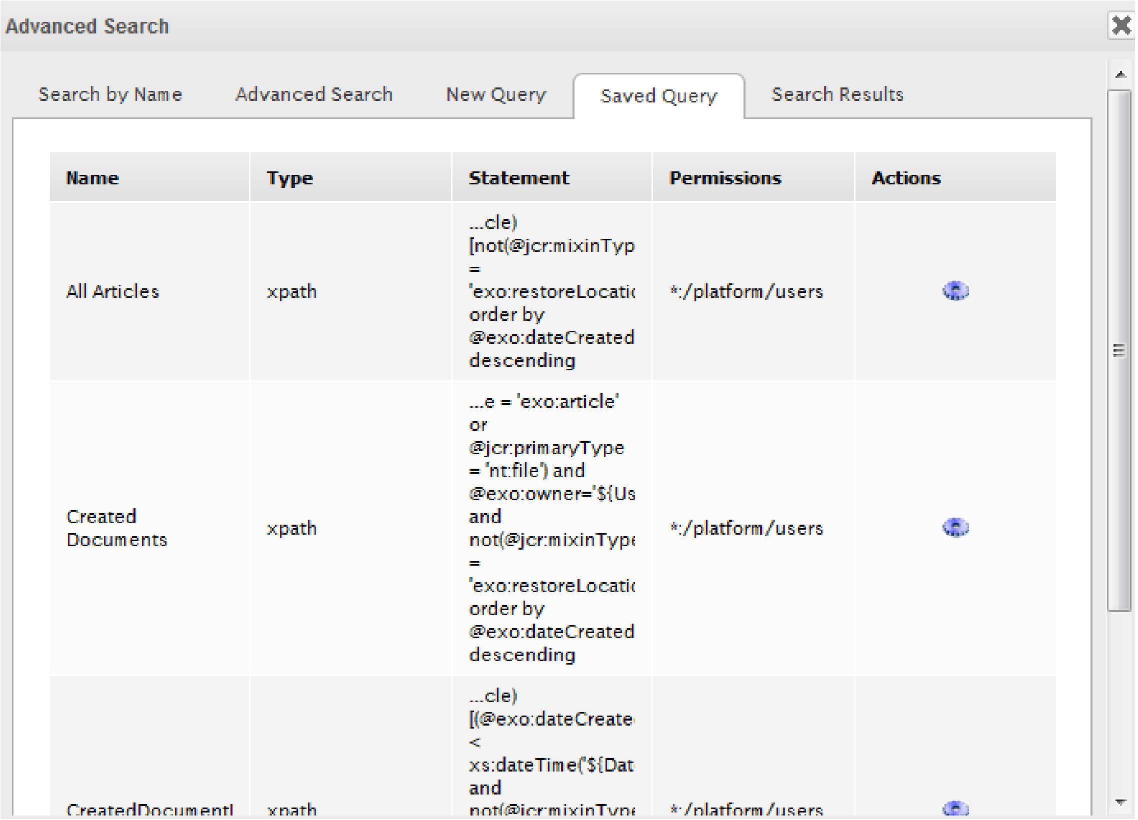
4. Click **Search** to perform the search and display the results in the **Search Results** tab;

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

   Or, click **Cancel** to quit.

4.6.5.6.2.4. Search by existing queries

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

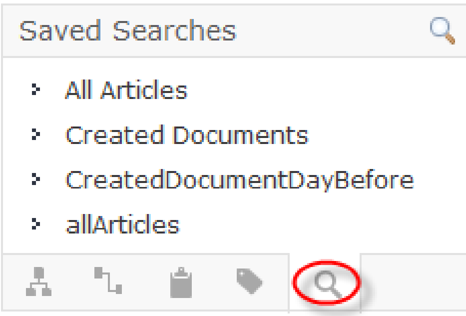


- Click to perform the search. You will see results in the **Search Results** tab.
- Click to edit the query statement. The query form will appear like when creating a query (see the *Search by creating a new query* section); however, you cannot edit the name of the saved search.
- Click to delete a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

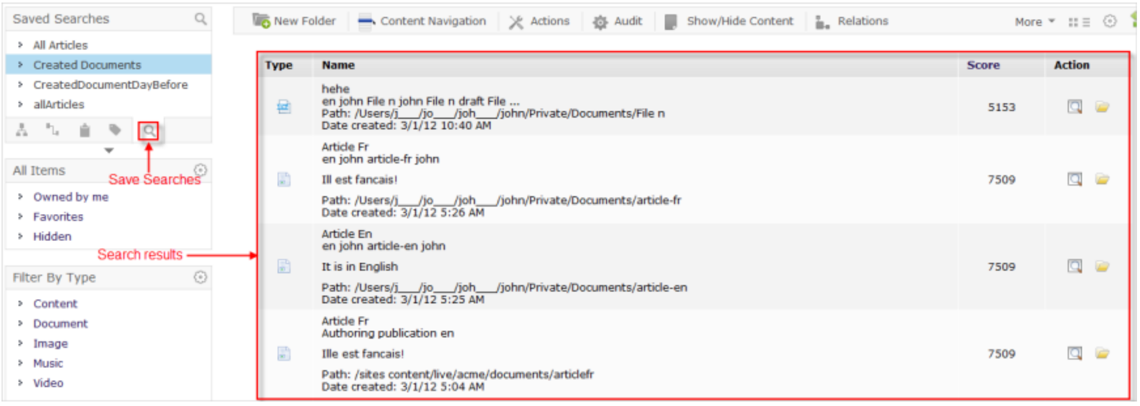
4.6.5.6.3. Search with saved queries

Do the followings to perform a search with saved queries:

1. Click on the sidebar 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 the *Search by creating a new query* section 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.

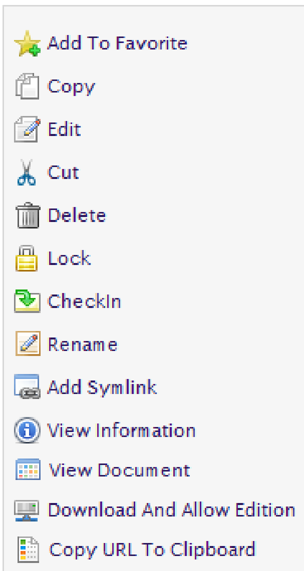
4. Click the required document or folder name to view or download them.

4.6.6. Actions on folders and documents

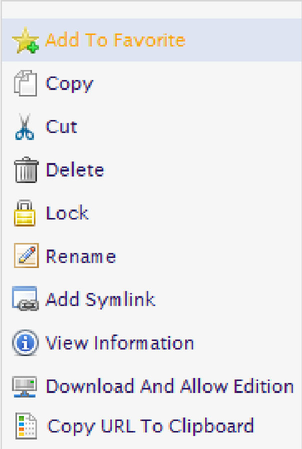
This section represents actions on folders and documents through the right-click menu (Adding to favorites, copying, cutting, pasting, adding Symlink, locking/unlocking, viewing/renaming/ downloading document, and allowing edition and copying URL to clipboard) and other actions (dragging and dropping folders or documents).

Depending on the actions on folders or documents, the right-click menu (drop-down menu) will be different.

- ***Actions in the right-click menu for documents:***



- ***Actions in the right-click menu for folders:***



4.6.6.1. Add to favorites

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

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

2. Click 

from the drop-down menu.

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

4.6.6.2. Copy/Paste & Cut/Paste

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

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

The first way

1. Right-click the node, then select **Copy** or **Cut** from the drop-down menu.

2. Right-click a destination node that you want to be the parent node of the copied/cut node, then select **Paste** from the drop-down menu. Note that the **Paste** function is enabled in the menu only after selecting the **Copy/Cut** action.

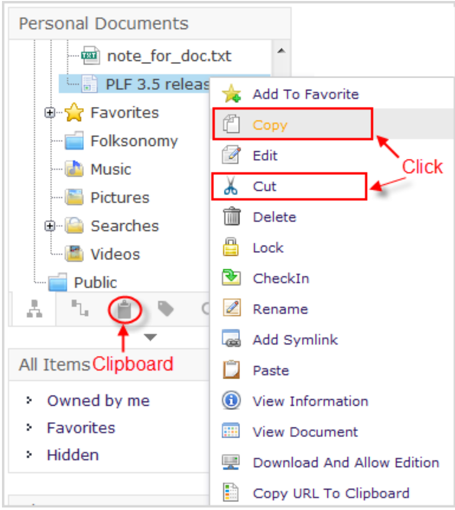
   The copied/cut folder (and its sub-folders) will be pasted into the new selected path.

The second way

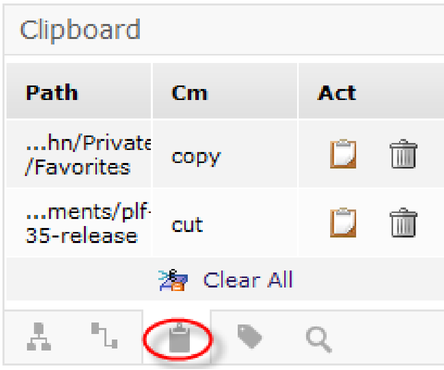
1. Right-click the node and select **Copy/Cut** from the drop-down menu.

2. Select the destination node that you want to be the parent node of the copied node.

3. Select the *Clipboard* icon on the **Filter** bar.



The **Clipboard** window will appear.



4. Click in the clipboard window to paste the copied/cut node into the selected destination node in Step 3.

- You can click to delete a specific waiting statement.
- 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.

Note

You only can take the **Copy** action if you have this right on the source node.

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

If the destination node has the same name with the copied node, after being pasted, an index will be added to the name of the pasted node, for example *Live* and *Live[2]*.

> You cannot copy a content folder into a document folder.
>
> After taking the **Copy** action, you can take the **Paste** action on different nodes before taking another **Copy** action.

4.6.6.3. Edit documents

To edit a document, refer to the *Edit web content* section.

4.6.6.4. Delete folders and documents

This function helps you remove folders/documents from their locations easily. Do the same steps as in the *Delete web content* section.

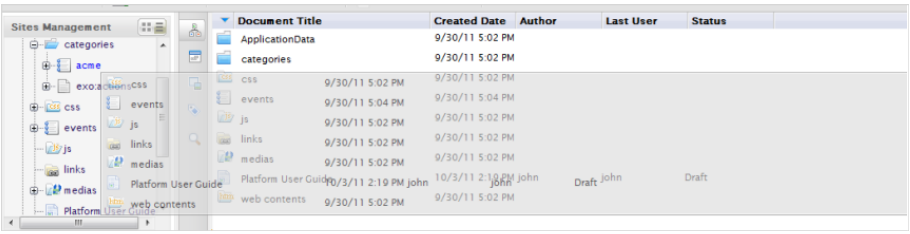
> **Note**
>
> You can only take the **Delete** action if you have the right on a node.
>
> If the deleted node contains sub-nodes, these sub-nodes will be deleted, too.

4.6.6.5. Drag and drop folders and documents

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

1. Hover your cursor over folders/documents in the right pane, or hold the **Ctrl** or **Shift** key to select multiple folders/documents at once until the cursor changes to .

2. Press the left-mouse button and drag the selected folders/documents.



3. Drop them into another folder in either the right or left pane by releasing the left-mouse button. The "dragged" folders/documents will be relocated to the destination folder.

4.6.6.6. Lock/Unlock folders and documents

This function is to avoid changes on specific folders/documents and actions by others, during a specific time.

Lock folders/documents

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

> **Note**
>
> Only users with appropriate rights can lock folders/documents.
>
> After being locked, other users can only view the folders/documents.
>
> The lock will be kept as current for a session only. If the locking user signs out, the node will be unlocked.
>
> Other users can copy the locked node (by using the **Copy/Paste** functions outlined above); however, the original node cannot be removed or altered.
>
> If no action is taken on a locked node within 30 minutes, the lock will be automatically removed.

Unlock folders/documents

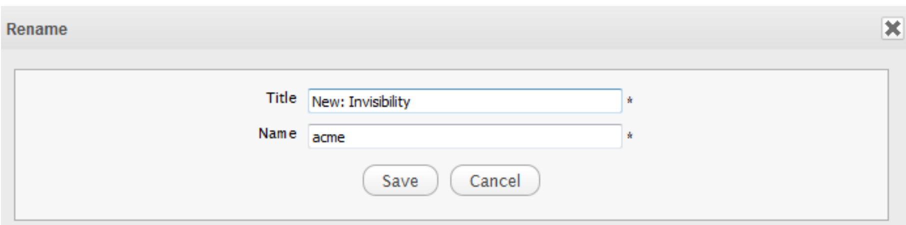
To unlock the locked folder/document, right-click it and select **Unlock** from the drop-down menu. The folder/document will then be unlocked and other users can take actions on it.

4.6.6.7. Rename folders and documents

This function is used to change the folder/document name.

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

   The **Rename** form will appear.

2. Input a new name in the **Name** field. You can also change the its title by entering a new one in the **Title** field.

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

4.6.6.8. Add a Symlink

A symlink embedded into a node allows you to quickly access the node even if you are in other nodes.

To add a symlink, simply right-click a document that you want to add a Symlink, and select **Add Symlink** from the drop-down menu. The symlink will be added to the selected document immediately. To view its content, simply click the symlink.

4.6.6.9. View WebDAV

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

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

2. Right-click the node and select **Download And Allow Edition** from the drop-down menu.

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

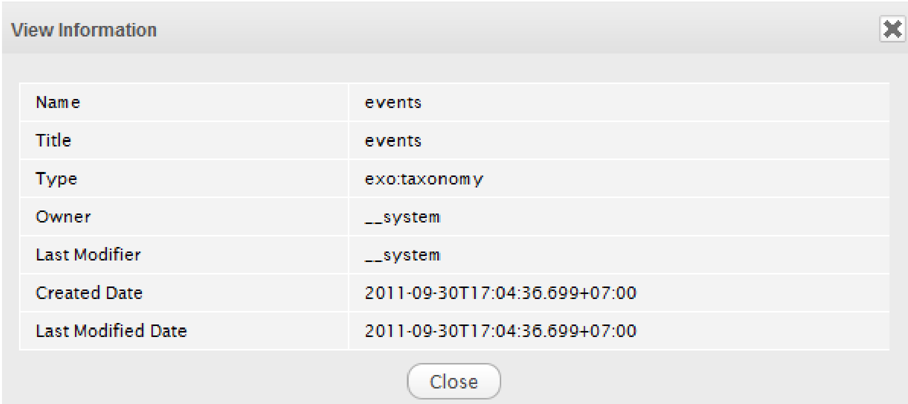
   - **Folder:** The sub-nodes list of the current folder will be displayed in WebDAV.
   - **nt:file:** The content of the document will be shown.
   - **Article:** This node type does not, by default, list any folders. However, if the Article includes actions, added language or other data, all folders will be listed and named; *exo:actions*, *exo:language* and so on.
   - **Podcast:** Being viewed in WebDAV, this node type will be attached a form which must be completed to download this document.
   - **Sample Node:** This node lists folder names as *exo:images.* Like **Article**, if the **Sample** node contains actions or added languages, folders will be named as *exo:actions*, *exo:language*, and more.
   - **File Plan:** This node behaves the same way as **Article** and **Sample Node.**
   - **Kofax:** This node behaves the same way as **Article** and **Sample Node.**

4.6.6.10. View information

eXo Platform supports you to view all information of a document, such as name, title, creator, and publication state of the document.

To view information of a document, simply right-click the document, and select **View Information** from the drop-down menu.

The **View Information** form appears as below.



4.6.6.11. View document

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

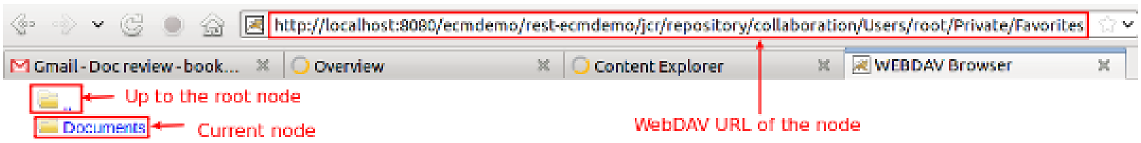
To view a document, simply right-click it, and select **View Document** from the drop-down menu. The document is opened in another tab.

4.6.6.12. Copy a URL to the clipboard

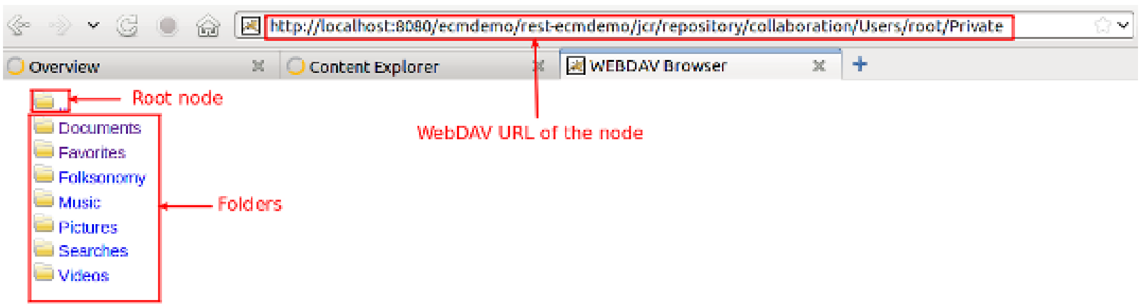
The **Copy URL To Clipboard** enables you to copy the WebDAV URL of a selected folder or a document. You then can view it with the WebDAV view on a browser.

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

2. Paste the URL on another tab.



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

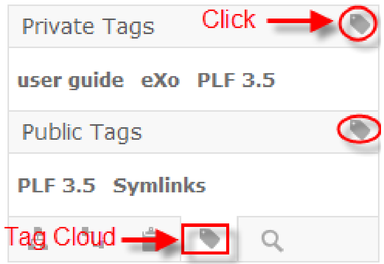


4.6.6.13. Manage tags

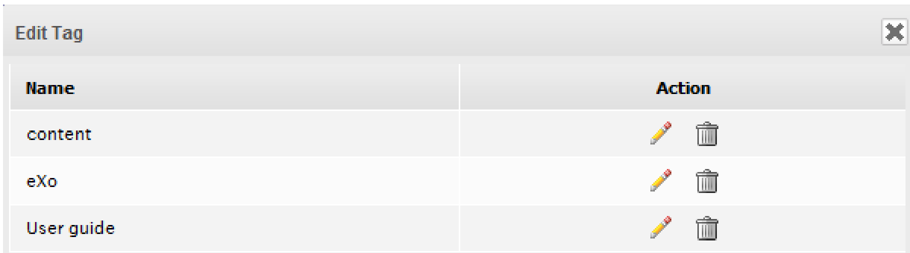
Tags are easily managed by editing or deleting them with the **Tag Manager.**

Edit a tag

1. Click **Tag Cloud** on the **Filter** bar, then click at the upper-right corner of the tags pane.

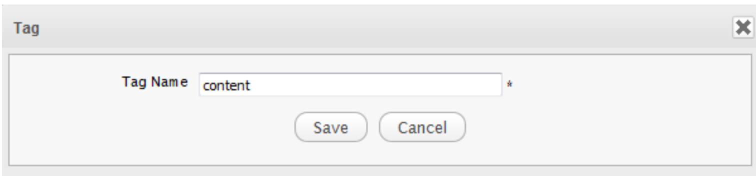


The **Edit Tag** form will appear.



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

3. Edit the tag to your desires.



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

Delete a tag

1. Do *Step 1 [146]* from the procedure above.

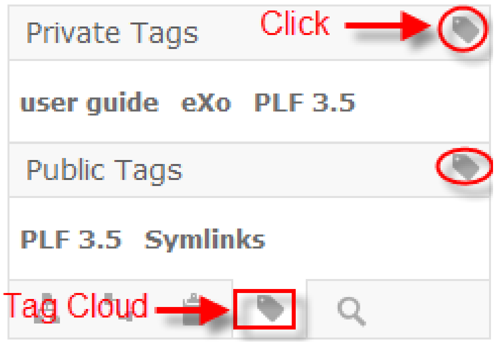
2. Click .

3. Click **OK** in the confirmation message to delete the tag.

Use your created tags

1. Click .

   You will see all existing tags which are listed and classified by private or public tags.

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

2. Each tag is similar to a link listing all documents to which it is added. To display the documents list in the right pane, click a tag name.

4.7. Manage content with WebDAV

What is WebDAV?

WebDAV is an abbreviation of **Web-based Distributed Authoring** and **Versioning.** 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 webpages within a server's namespace.

Why use WebDAV?

With WebDAV, you can manage content efficiently with the following actions:

- Copy/paste content on your device and have those changes reflected in a host-based website.
- Manipulate actions on a website easily, quickly and flexibly without accessing it directly with web-browsers. Files can be accessed from anywhere and are stored as in local directories.
- Easily and quickly upload content to a website simply by copying it into the appropriate directory.

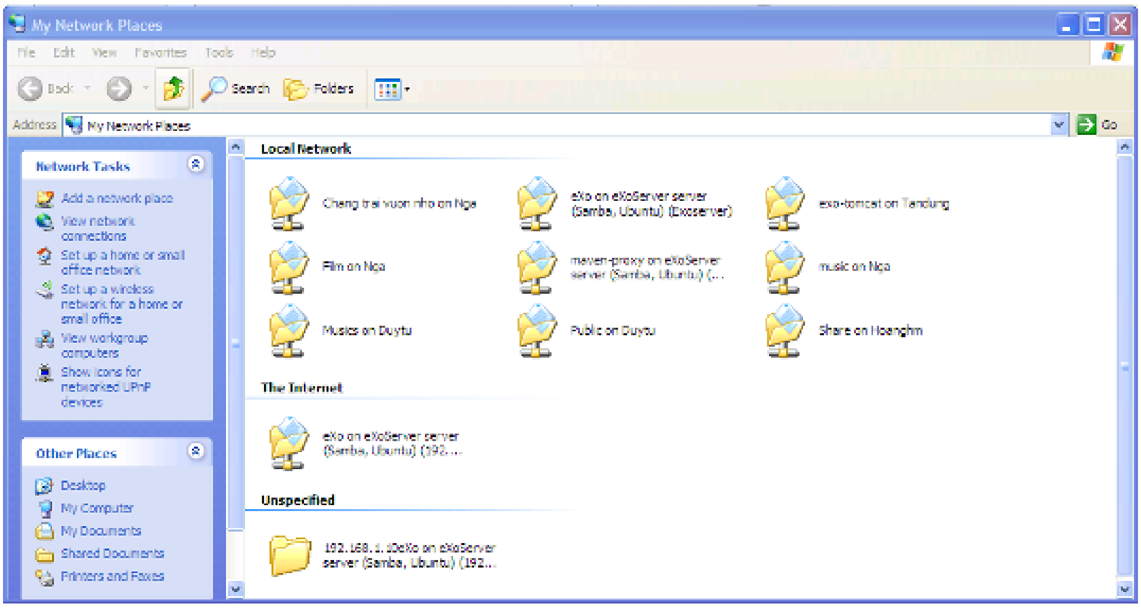
4.7.1. Use WebDAV in eXo Platform

To use WebDAV in eXo Platform, you first need to have the Internet or Intranet connected. Next, you can follow one of the two following ways:

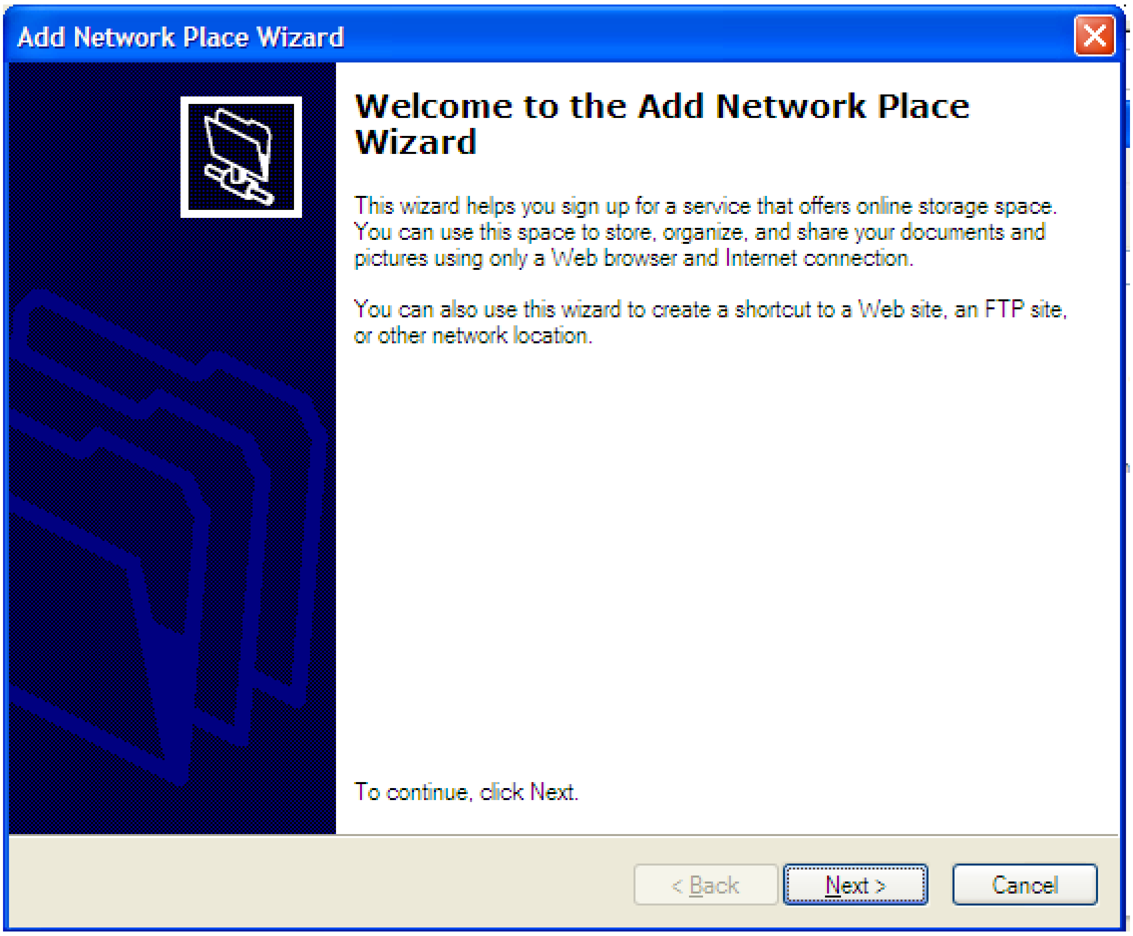
The first way

You need to connect to the WebDAV server. For example, for Windows XP, do the following steps:

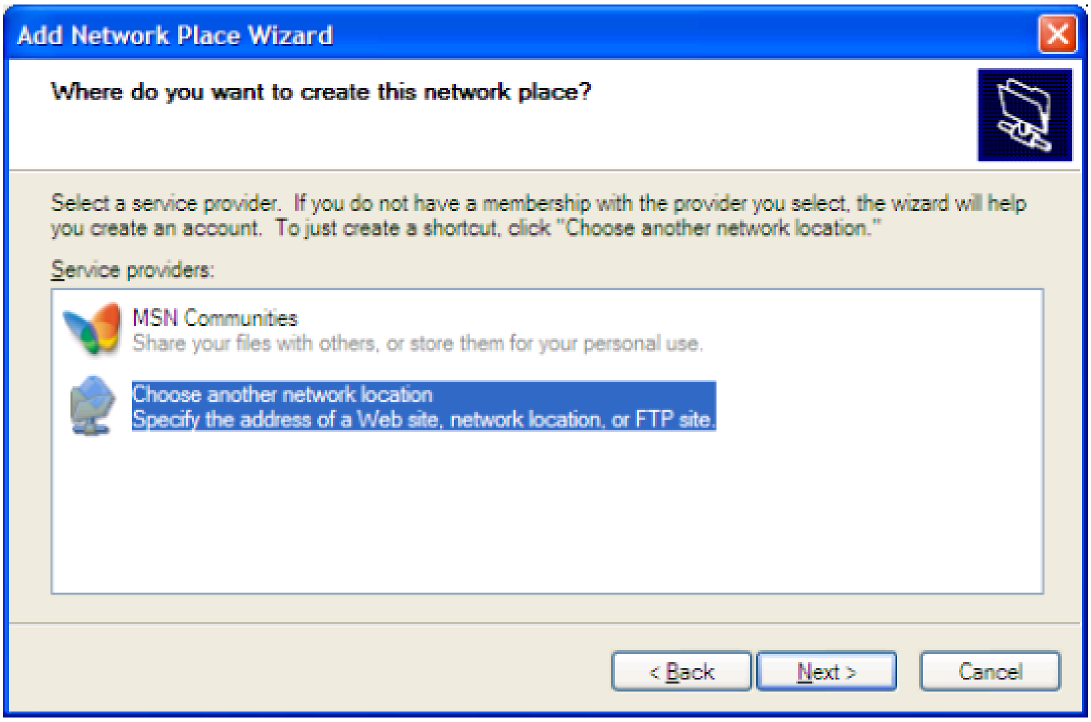
1. Navigate to the **My Network Places** on your local device. You will see all shared files and folders:



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



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

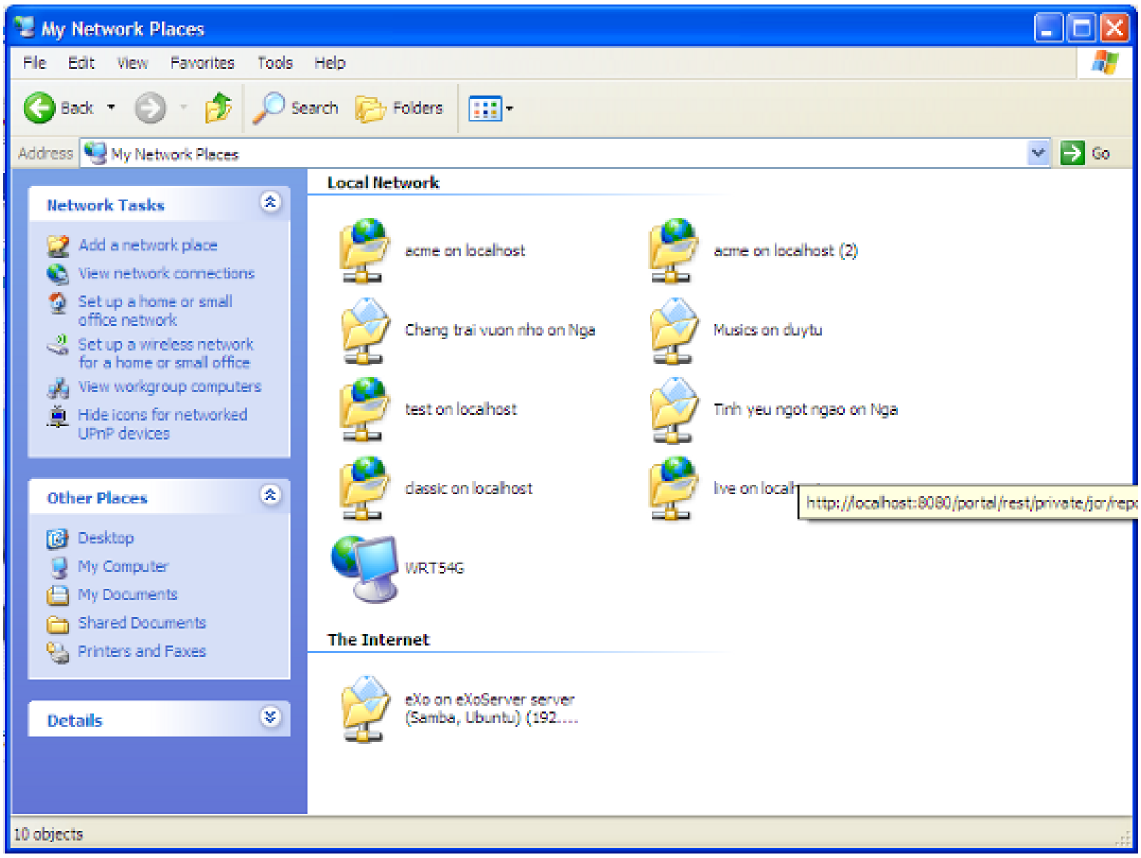


4. Select **Choose another network location** to create a shortcut.

5. Enter an address into the **Internet or network address** field.

   For example, the address of the *Acme* demonstration site is `http://mycompany.com:8080/portal/rest/private/jcr/repository/collaboration/sites/content/live/acme`.

6. Click **Next.** After a few seconds, 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.

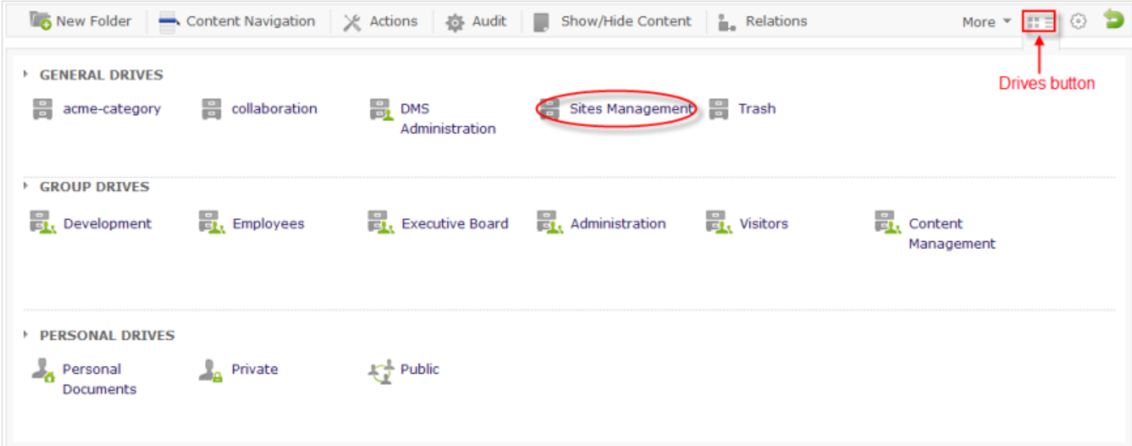
7. Take actions on the content in this folder to administrate the site content remotely.

The second way

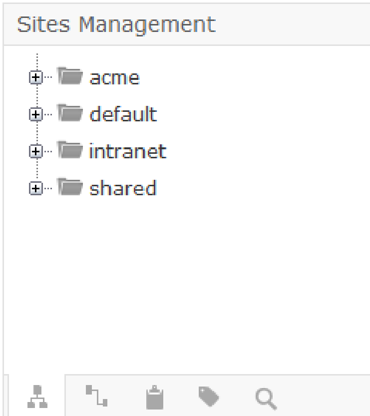
This way can be done through **Sites Management.**

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

2. Click the **Drives** button, then select **Sites Management.**

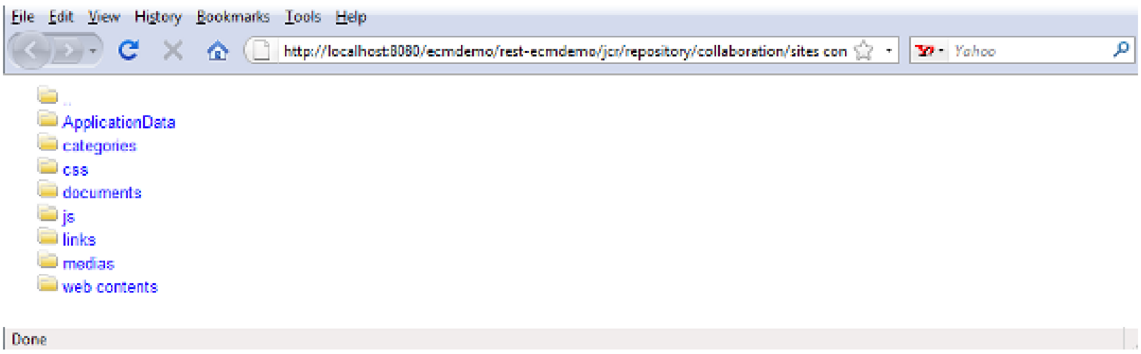


You will see all sites listed in the left sidebar.



3. Right-click your desired site to view with WebDAV, and select **Download and Allow Edition** from 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.

4.7.2. Add new content to a specific site

This function enables you to copy web content, such as an **.html** file, from your local device to a *web content* folder of a site.

1. Access a site via WebDAV (refer to the *Use WebDAV in eXo Platform* section), then go to a **web content** folder of the site.

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

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

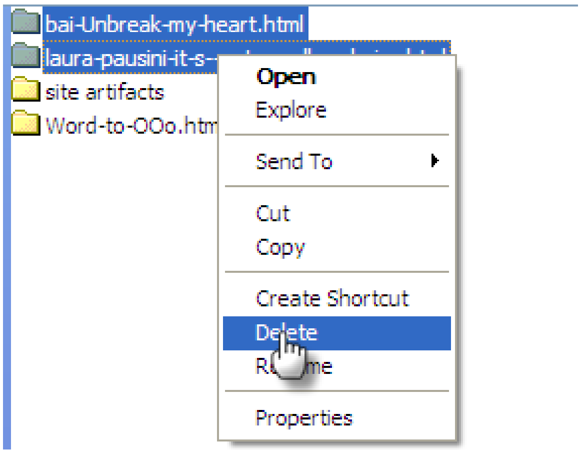
After the new content is added, it can be viewed as a folder in WebDAV or as a page using a web browser.

4.7.3. Delete web content

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

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 drop-down menu.



   The selected files will be removed from the site.

4.8. Manage newsletters

eXo Platform provides the **Newsletters** service, aiming at helping users quickly get the updated newsletters from a website.

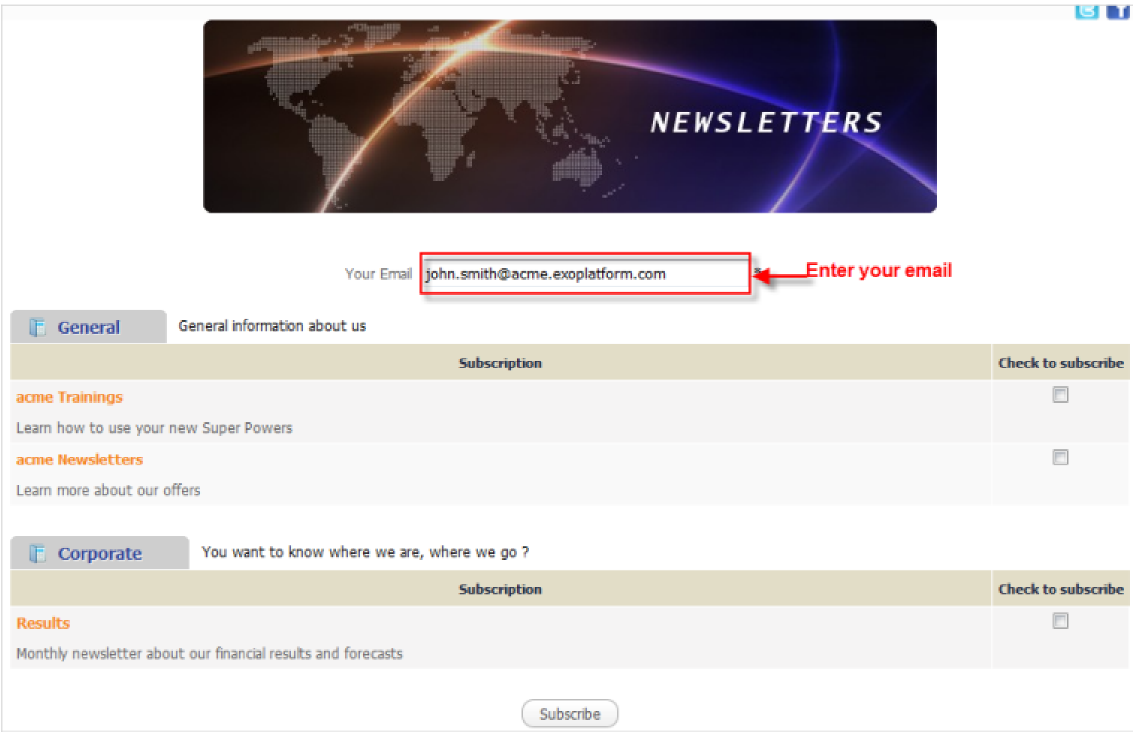
4.8.1. Newsletter viewer

> **Note**
>
> The **Newsletter** portlet is deprecated in eXo Platform. It remains fully supported for eXo customers, however it will not receive any enhancement and will be removed from the product scope in the future.

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

Subscribe your email to get newsletters from eXo Service

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 informing that you have just subscribed to the selected newsletter will appear.

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

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

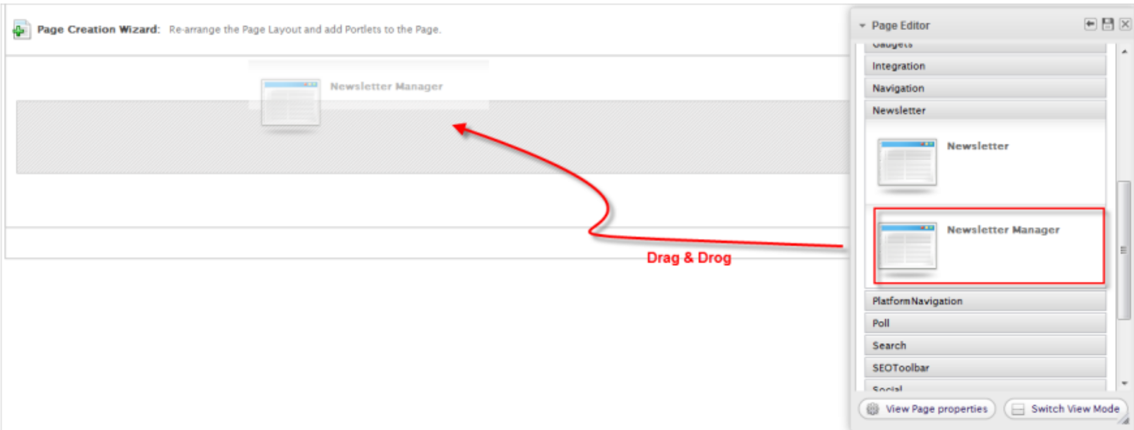
7. Click **Forget this email** if you want to unsubscribe from newsletters.

4.8.2. Newsletter Manager

> **Note**
>
> The **Newsletter Manager** portlet is deprecated in eXo Platform. It remains fully supported for eXo customers, however it will not receive any enhancement and will be removed from the product scope in the future.

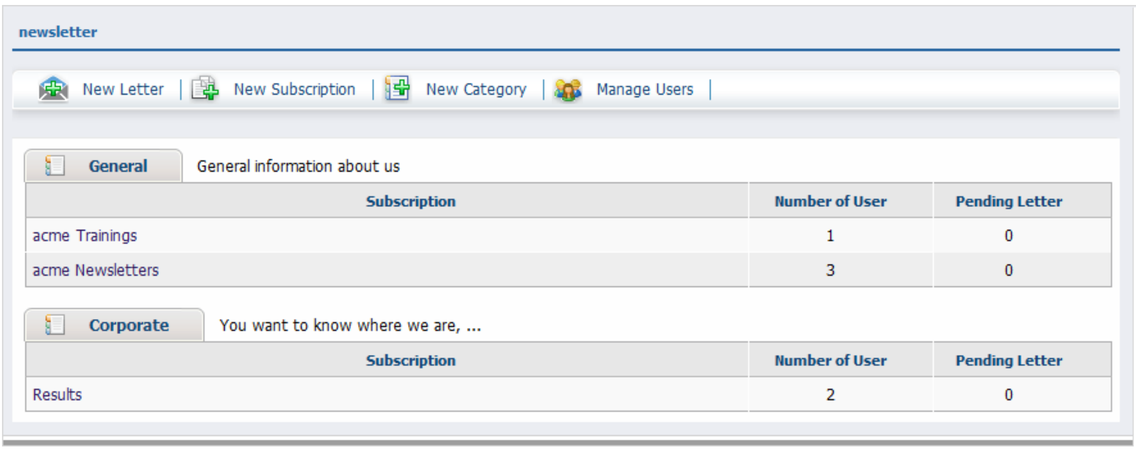
eXo Platform facilitates administrators to easily and quickly manage newsletters.

To use this portlet, you first need to add it to a specific page by dragging and dropping **Newsletter Manager** from **Page Editor** to the main pane. This can be done when *creating a new page* or *editing an existing page* or *editing the layout of a portal*.



> **Note**
>
> In eXo Platform, the **Newsletter Manager** portlet is put in **Page Editor --> Applications --> Newsletter.**

Access the page with the **Newsletter Manager** portlet to open the **newsletter** page.



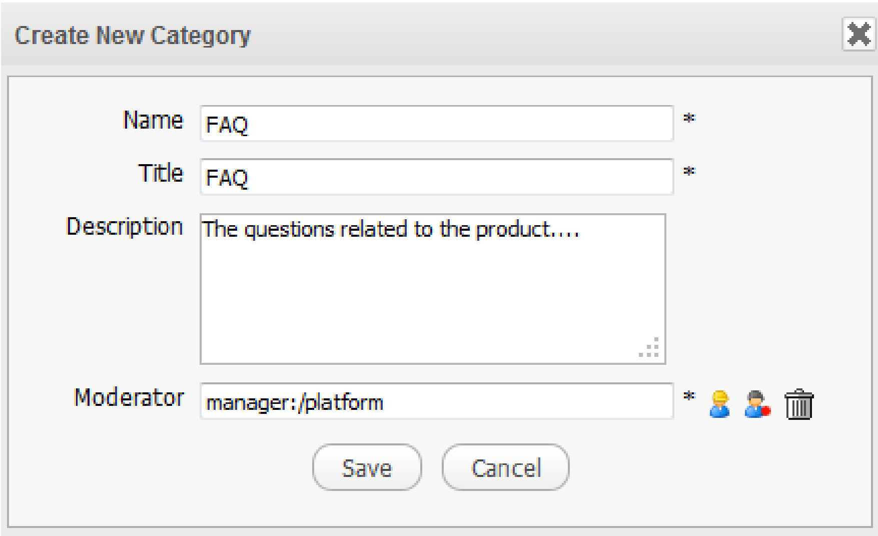
4.8.2.1. Manage categories in Newsletter

Managing categories in **Newsletter** includes the following actions:

- *Add a new category*
- *Edit a category*
- *Delete a category*
- *Manage users*

4.8.2.1.1. Add a new category

1. Click **New Category** on the **Action** bar of the **Newsletter** page. The **Create New Category** form will appear.



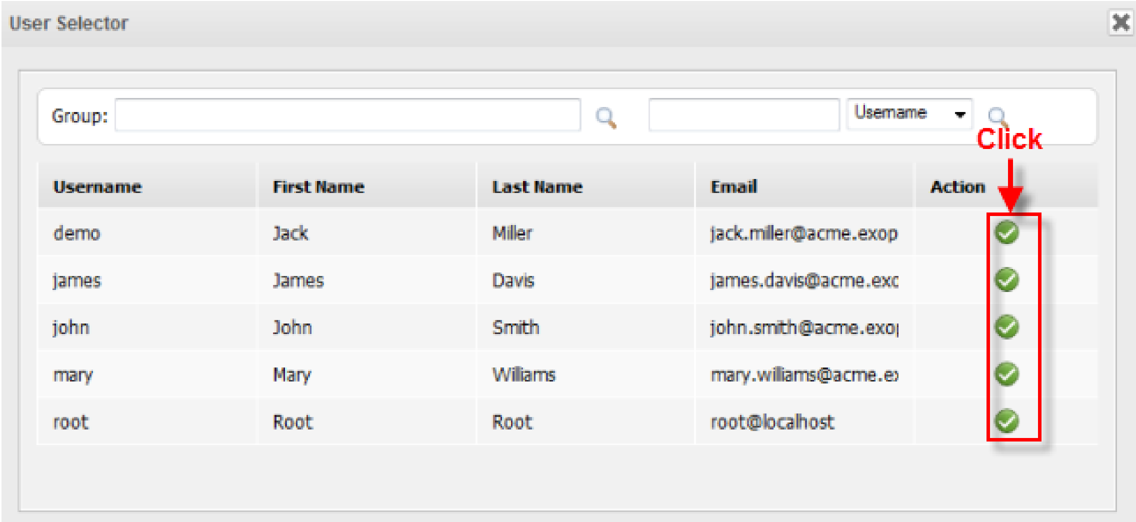
Details:

Table 4.32.

Field	Description
Asterisk (*)	This mark next to each field means that it is required to enter values into that field.
Name	The name of a category.
Title	The title of a category.
Description	A brief description of the category.
Moderator	Select users/groups who have rights to manage this category.

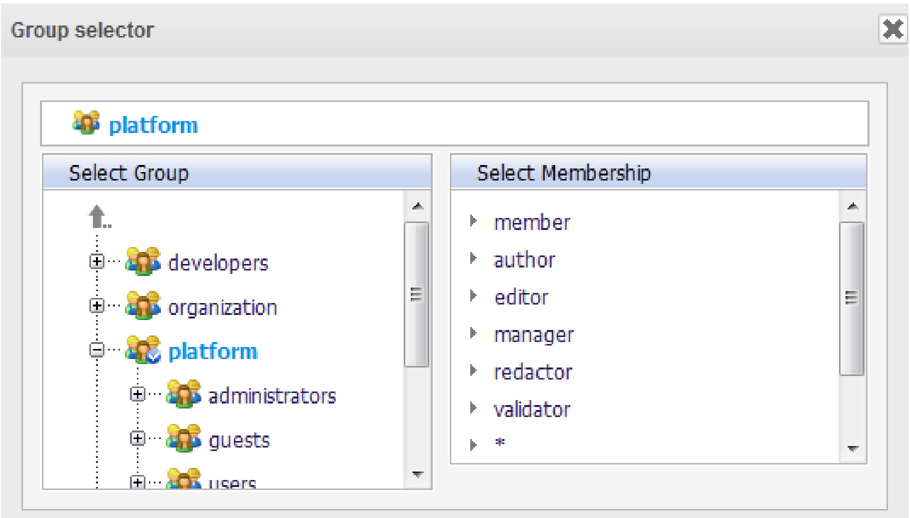
2. Input values into fields.

i. Select a moderator for a category by clicking next to the **Moderator** field to open the **User Selector** form.



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

ii. Click to select users in a specific group. The **Group selector** window will appear.



- Select a group from the left pane and a membership type from the right pane.

  The membership and group selected will be displayed in the **Moderator** field.

3. Click **Save** to accept creating a new category.

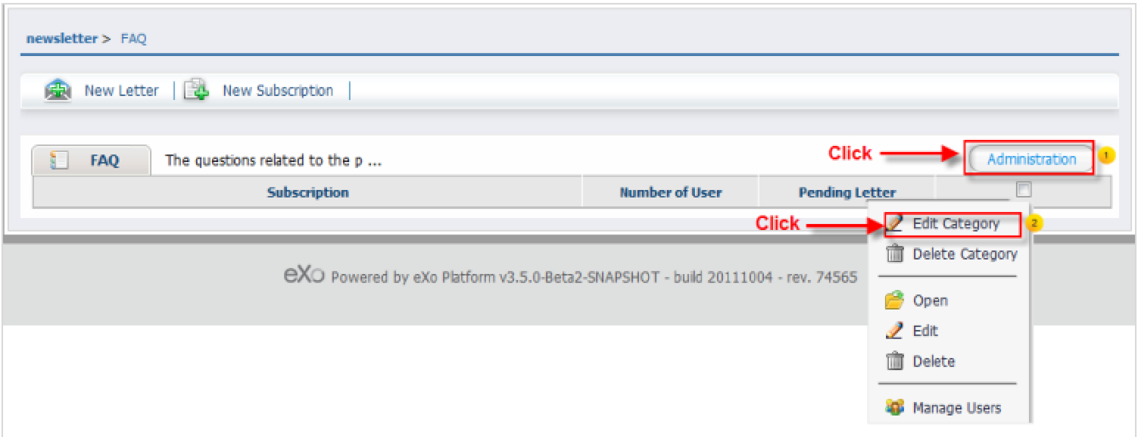
   You will see your added category in the list of categories.

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

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

4.8.2.1.2. Edit a category

1. Select a category that you want to edit.
2. Click **Administration --> Edit Category** from the drop-down menu.



   The **Create New Category** form appears.

3. Change the values in the **Title** and **Description** fields as required.

> **Note**
>
> The category name cannot be changed.

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

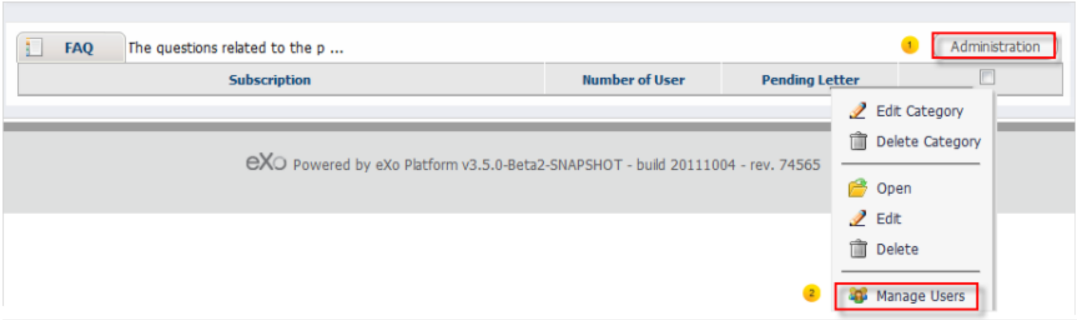
4.8.2.1.3. Delete a category

1. Select a category that you want to edit.
2. Click **Administration**, then select **Delete Category** from the drop-down menu.
3. Click **OK** in the confirmation message to delete the category.

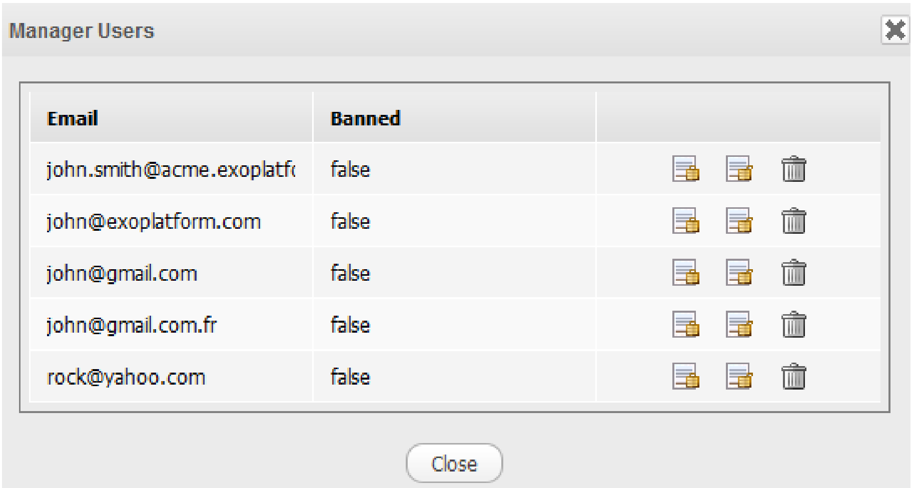
4.8.2.1.4. Manage users

Administrators can manage users accounts and activities with actions, such as *editing, banning, removing bans,* or *deleting.*

1. Select a category that you want to edit.
2. Select **Administration --> Manage Users** from the drop-down menu.



The **Manage Users** form will appear.



Details:

Table 4.33.

Field	Description
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.
	Ban this user from receiving emails.
	Remove a ban on a user.
	Delete the user.

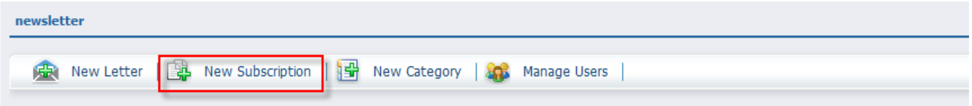
3. Click **Close** to close the form.

4.8.2.2. Subscriptions

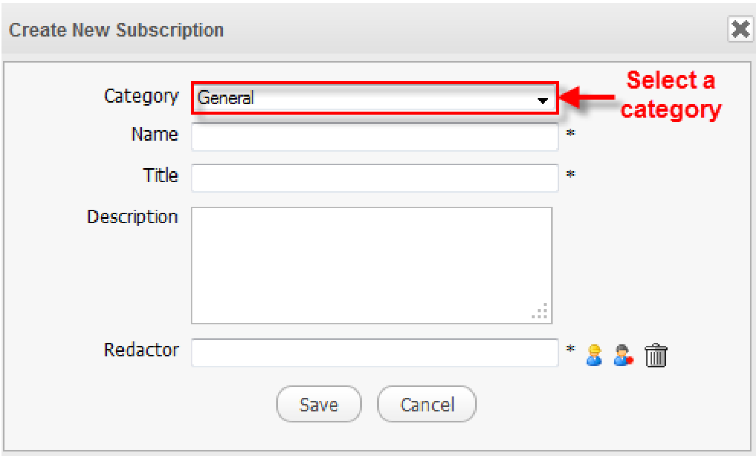
Administrators can add more subscriptions to any category via two ways as follows:

The first way

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



The **Create New Subscription** form will appear.



Details:

Table 4.34.

Field	Description
Asterisk (*)	This mark next to each field means that it is required to enter values into that field.
Category	The category which contains this subscription.
Name	The name of the subscription.
Title	The title of the subscription.
Description	The brief description about the subscription.
Redactor	Select users/groups who have rights to manage this subscription.

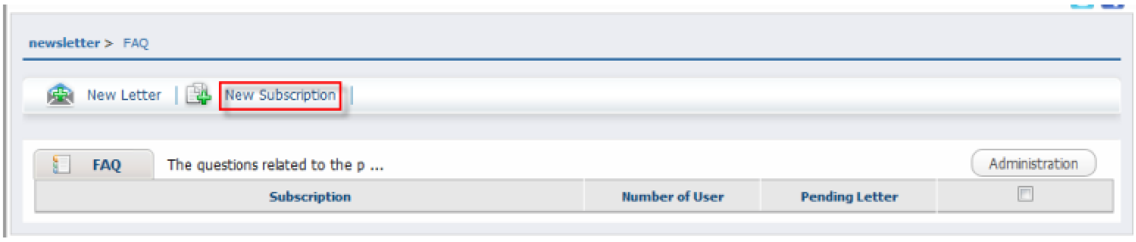
2. Click the **Category** field and select a category from the drop-down menu.

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

4. Click **Save** to create the new subscription.

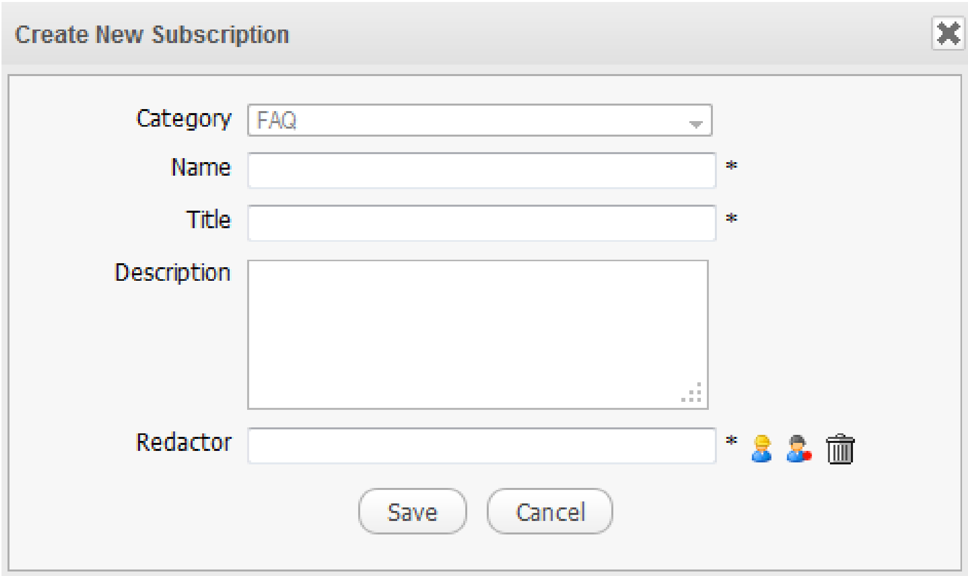
The second way

1. Click directly the category to which you want to add a new subscription.



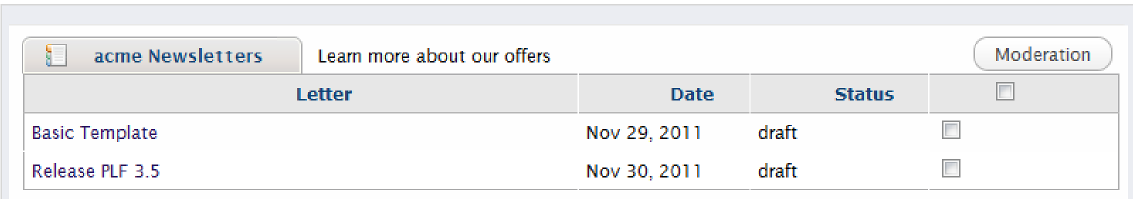
2. Click **New Subscription** on the **Action** bar.

   The **Create New Subscription** form pops up.



3. Do the same steps (3, 4) as stated in the *first way [159]*.

- Administrators can create newsletters for each subscription.
- These newsletters can be opened, edited, deleted or converted to a template for reuse.



Details:

Table 4.35.

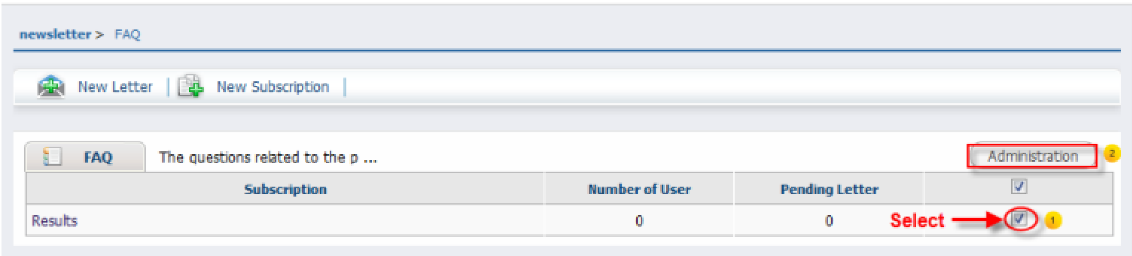
Element	Description
Shoes	The name of the subscription.

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

4.8.2.3. Open a newsletter

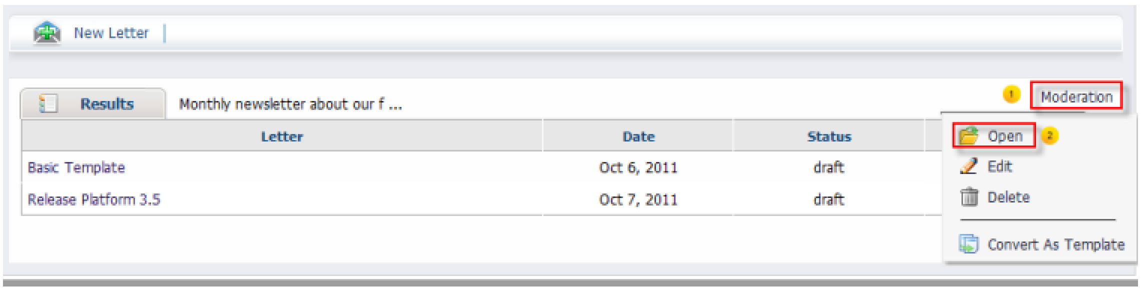
Administrators can easily view the content of a newsletter as follows:

1. Open the **subscription** containing the letter you want to open by clicking it or ticking the corresponding checkbox, then select **Administration --> Open**.

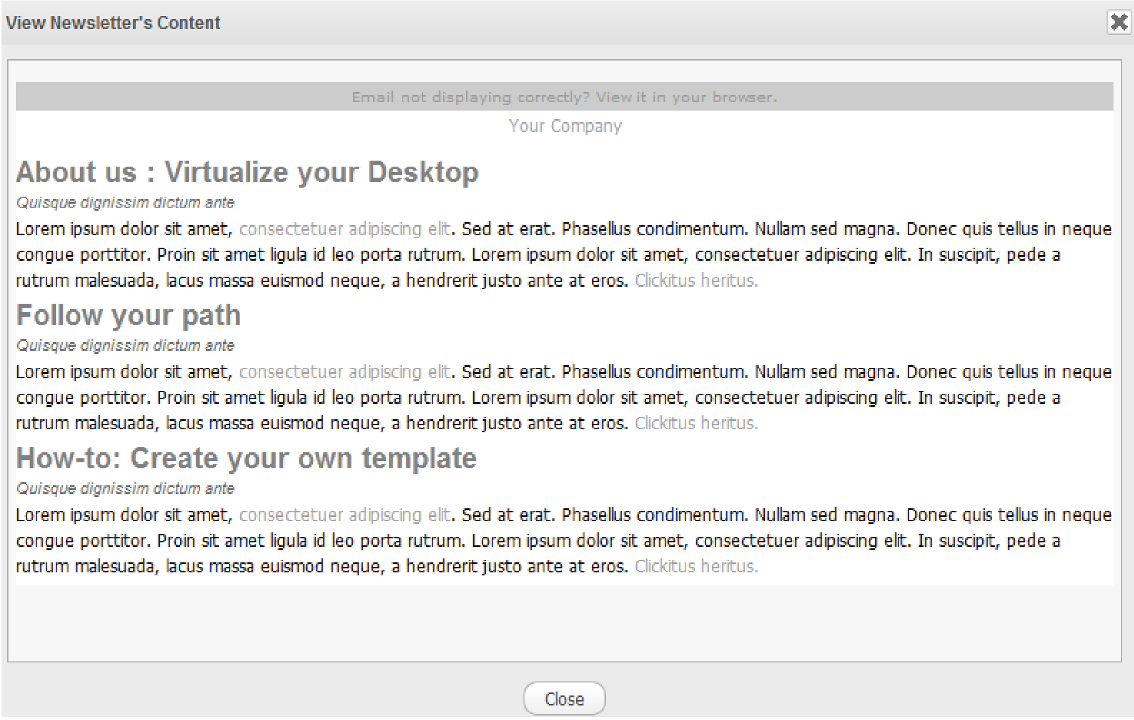


2. Directly click the newsletter;

   Or, select the checkbox corresponding to your desired newsletter, then click **Administration --> Open.**



The **View Newsletter's Content** form pops up.

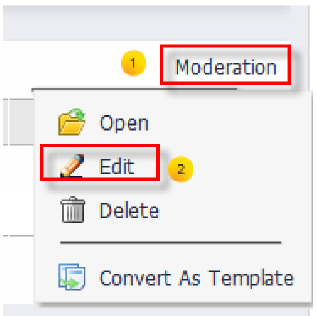


3. Click **Close** to exit.

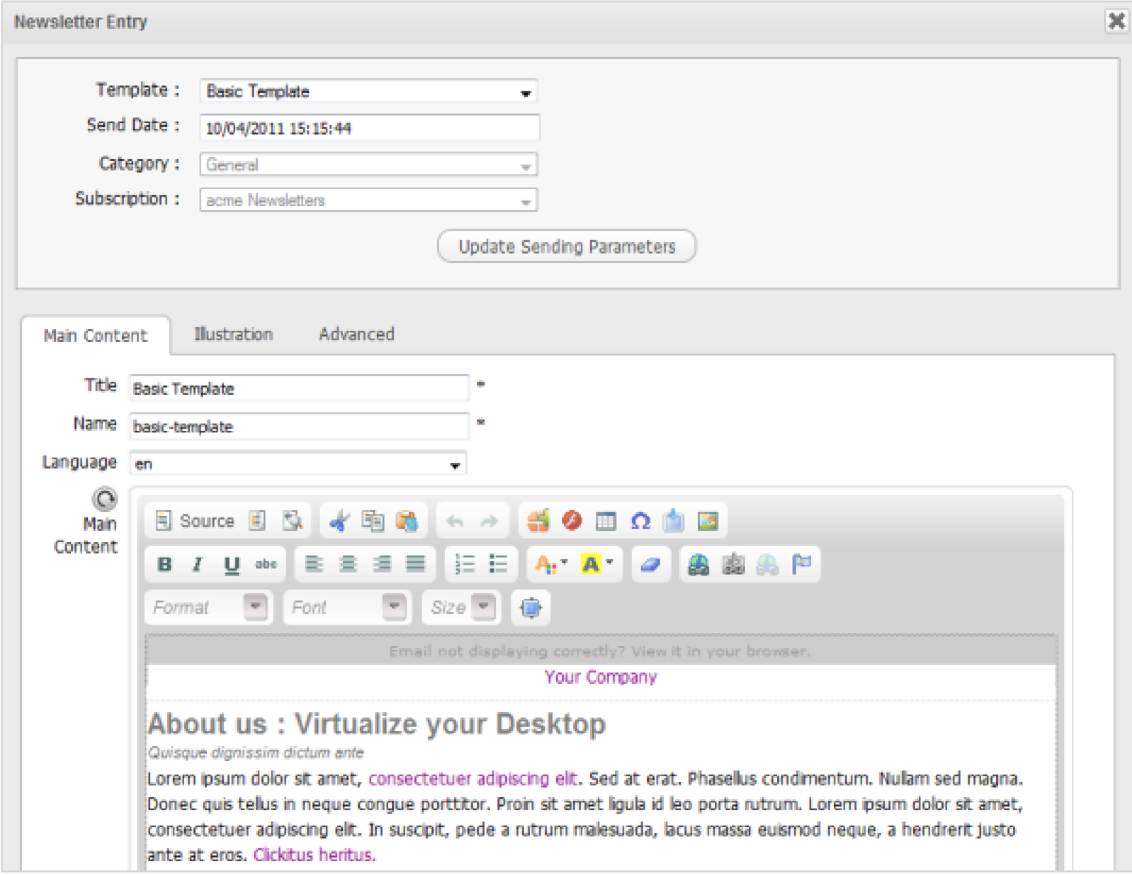
4.8.2.4. Edit a newsletter

1. Select the newsletter you want to edit by ticking the relevant checkbox in a specific subscription.

2. Click Moderation, then select **Edit** from the drop-down menu.



The **Newsletter Entry** pops up.



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 values in the **Title** and **Main Content** fields.

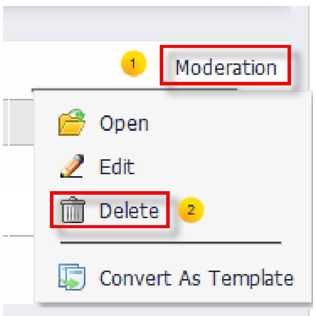
6. Click **Save** to save as draft, or click **Send.**

4.8.2.5. Delete a newsletter

Administrator can delete obsolete newsletters in a specific subscription.

1. Select the newsletter you want to delete by ticking the corresponding checkbox.

2. Click Moderation, then select **Delete** from the drop-down menu.



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

4.8.2.6. Convert as template

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

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

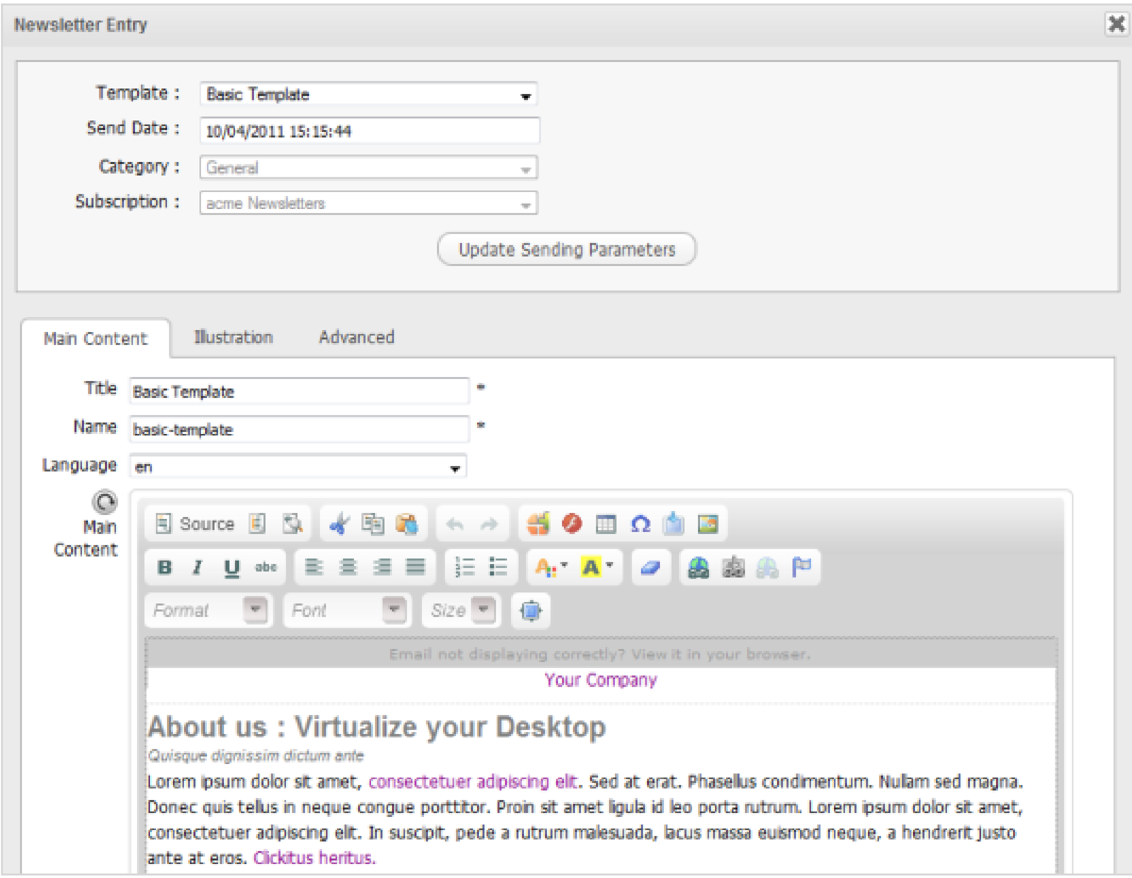
2. Click Moderation, then select **Convert As Template** from the drop-down menu. For the next time when you create a newsletter, this template will be listed in the **Template** field in the **Newsletter Entry** form.

4.8.2.7. Create a newsletter

Each subscription consists of many newsletters. In eXo Platform, you can easily create newsletters by following these steps.

1. Select a subscription where you want to create a newsletter.

2. Click New Letter on the **Action** bar to open the **Newsletter Entry** form.



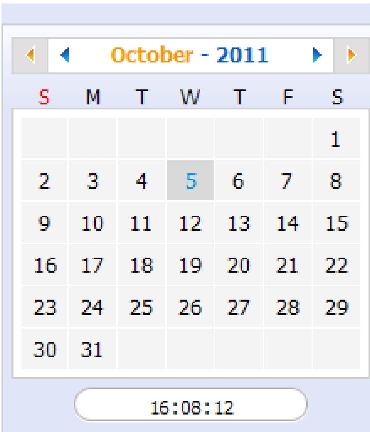
Details:

Table 4.36.

Field	Description
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 **Template** field to select the template for the newsletter.

4. Click the **Send Date** field. The calendar will appear, allowing you to select the date and time when you want to send the newsletter.



5. Click the **Category** and **Subscription** to select the category and the subscription in the list.

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

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

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

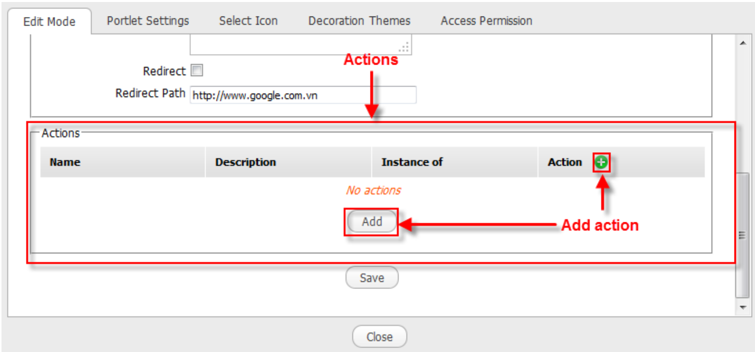
9. Click **Save** to save this newsletter as draft, or click **Send** to send this newsletter.

4.9. Manage content with Fast Content Creator

The **Fast Content Creator** portlet in eXo Platform enables you to quickly create and save a new document with only one template in a specific location without accessing **Sites Explorer.** This helps you save a lot of time when creating a new document.

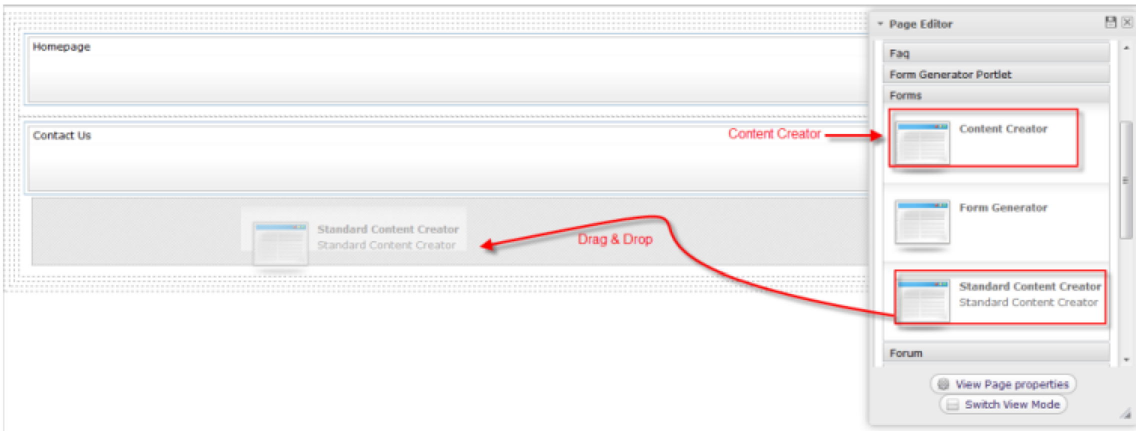
There are two modes in **Fast Content Creator: Content Creator** and **Standard Content Creator.**

The **Standard Content Creator** mode allows you to add an action to your document. When *Configuring Fast Content Creator*, the **Edit Mode** tab has the **Actions** part that allows you to add an action to the document and view actions added to the document.



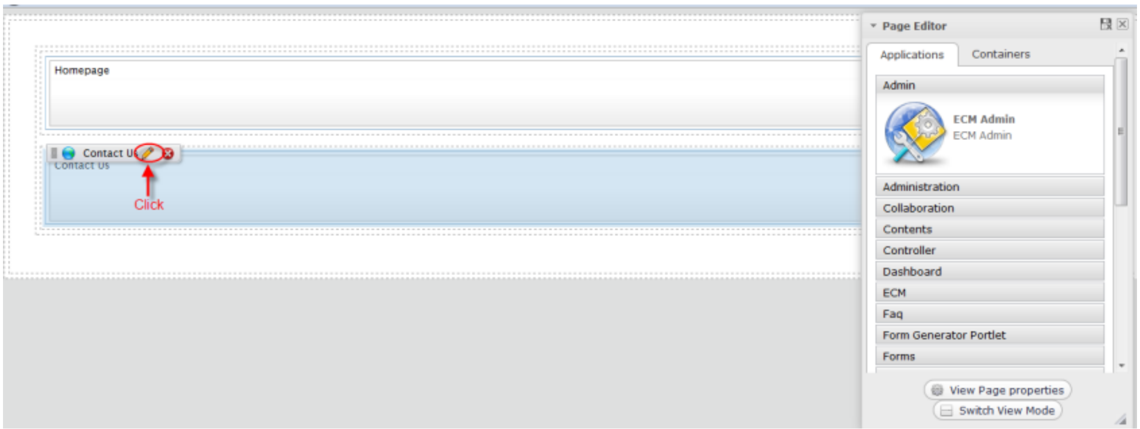
To add an action to a document, click **Add** or to open the **Add Action** form. Do the same steps in the *Add an action* section.

To use the **Fast Content Creator** portlet, you need to add it to a specific page first by dragging and dropping **Content Creator** or **Standard Content Creator** from **Page Editor --> Applications --> Forms** to the main pane. This can be done when *creating a new page* or *editing an existing page* or *editing the layout of a portal*.



4.9.1. Configure Fast Content Creator

In eXo Platform, the **Fast Content Creator** is applied in the **Question?** portlet with the **Content Creator** mode by default. Thus, in this guide, you are instructed how to configure the **Fast Content Creator** by editing the **Question?** portlet as an example.



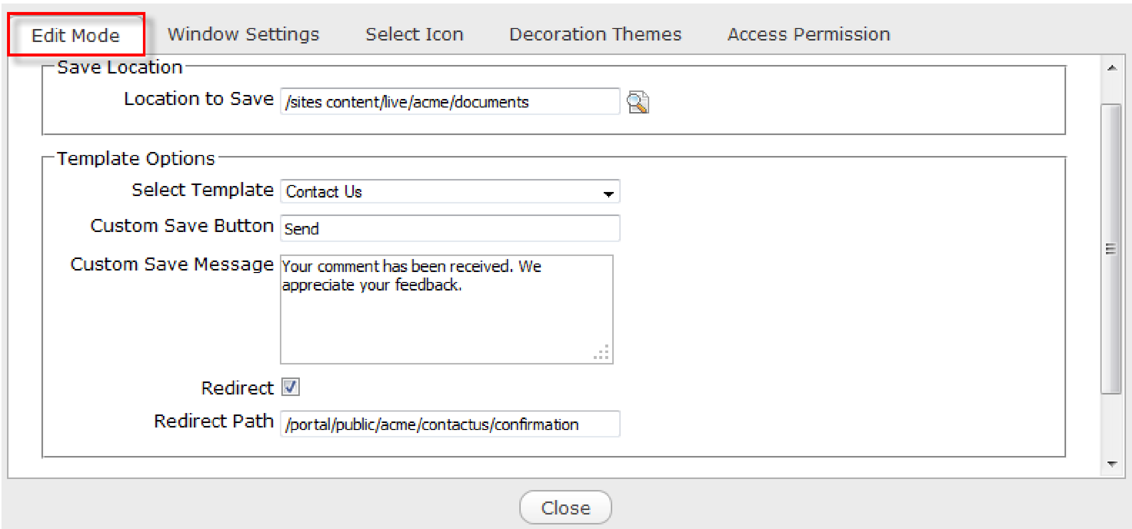
1. Open the **Question?** page.

2. Hover your cursor over **Edit --> Page**, then click **Layout** on the **Administration** bar.

   The edit page appear.

3. Hover your cursor over the portlet, then click to edit the portlet.

   The form with the **Edit Mode** tab appears.



Details:

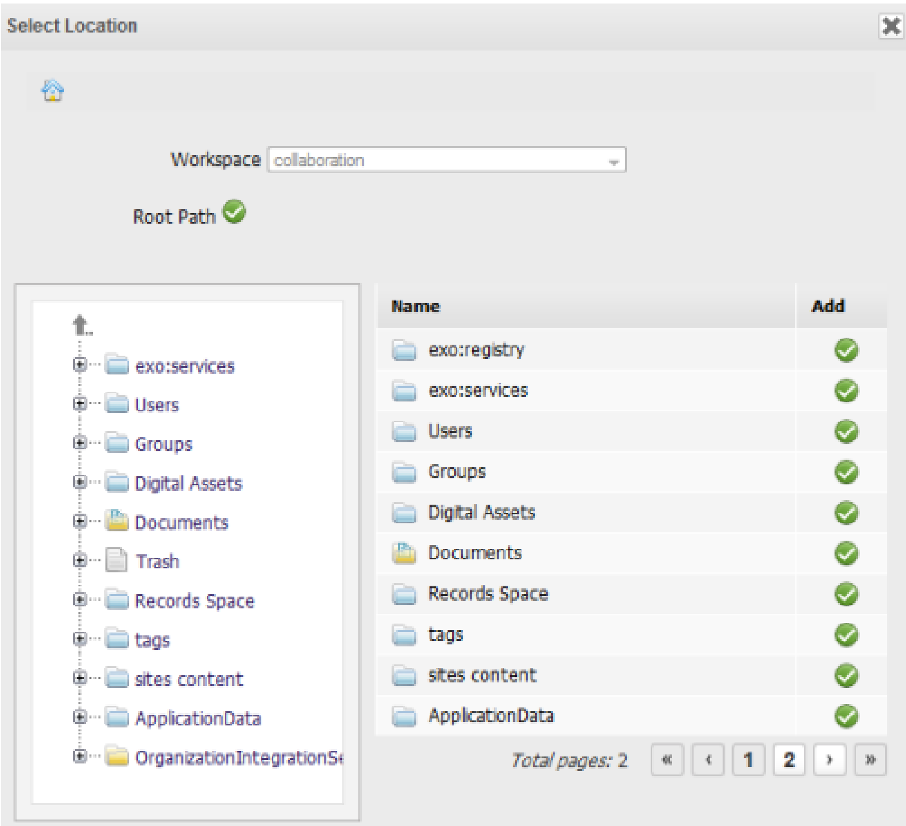
Table 4.37.

Field	Description
Location to Save	Select the location to save documents or messages.
Select Template	Select a template for the document. There are different input fields corresponding to each selected template.

Field	Description
Custom Save Button	Change the label for the "Save" button.
Custom Save Message	Change the content of custom message that informs you have just saved a document.
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 a specific location to save documents.

i. Click to open the **Select Location** form.



ii. Select the parent node in the left pane, then click in the **Add** column to select the child node in the right pane. 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 **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 confirmation message.

8. Click **Save** to finish the configuration of **Fast Content Creator**. Then, click **OK** in the notification message to accept your changes.

9. Click **Close** to quit the form to edit the configuration of **Fast Content Creator**.

4.9.2. Create new content

1. Go to your newly created page.

2. Fill values in all the fields in the page.

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 selected in the **Location to Save** field.

4.9.3. View content

After creating a new document by **Fast Content Creator**, you can view it as follows:

1. Go to **Sites Explorer.**

2. Select the drive and the path that you established in the configuration of **Fast Content Creator.** You will see this document.

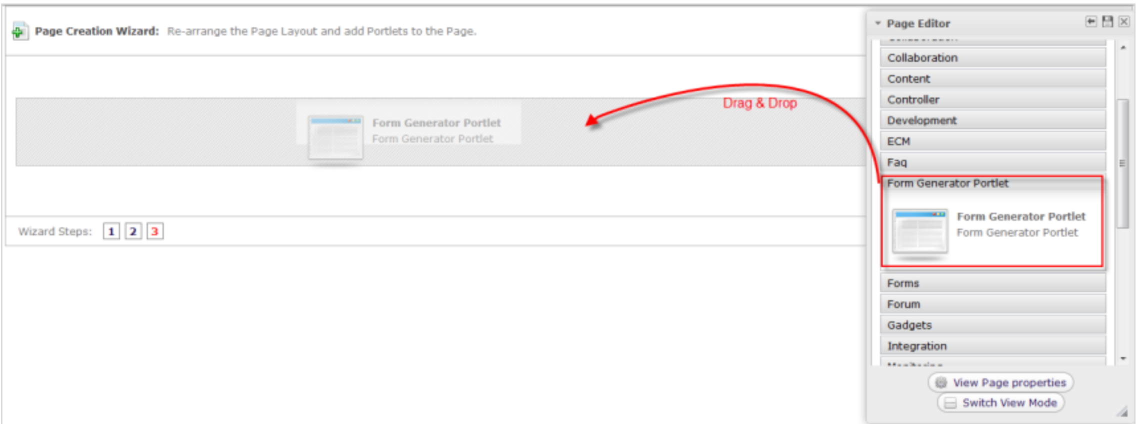
4.10. Create content templates with Form Builder

Note

The **Form Builder** portlet is deprecated in eXo Platform. It remains fully supported for eXo customers, however it will not receive any enhancement and will be removed from the product scope in the future.

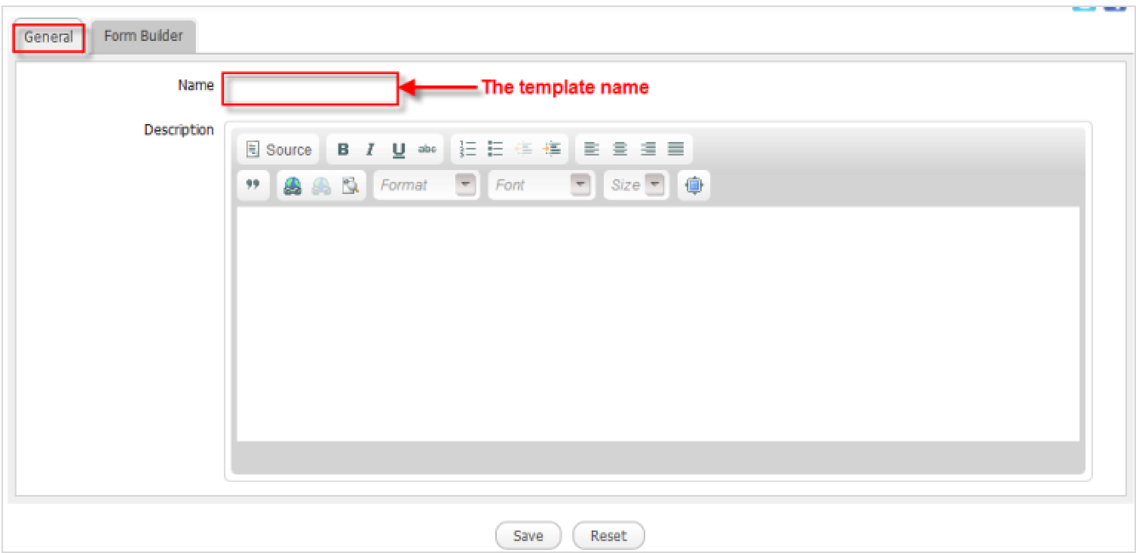
The **Form Builder** portlet allows users to create and edit the template of document types. Documents are stored in the so-called node; therefore, the term "node" and node types are often applied.

To use this porlet, you need to add it to a specific page first by dragging and dropping **Form Generator Portlet** from **Page Editor --> Applications --> Form Generator Portlet** to the main pane. This can be done when *creating a new page* or *editing an existing page* or *editing the layout of a portal*.



Create a content template

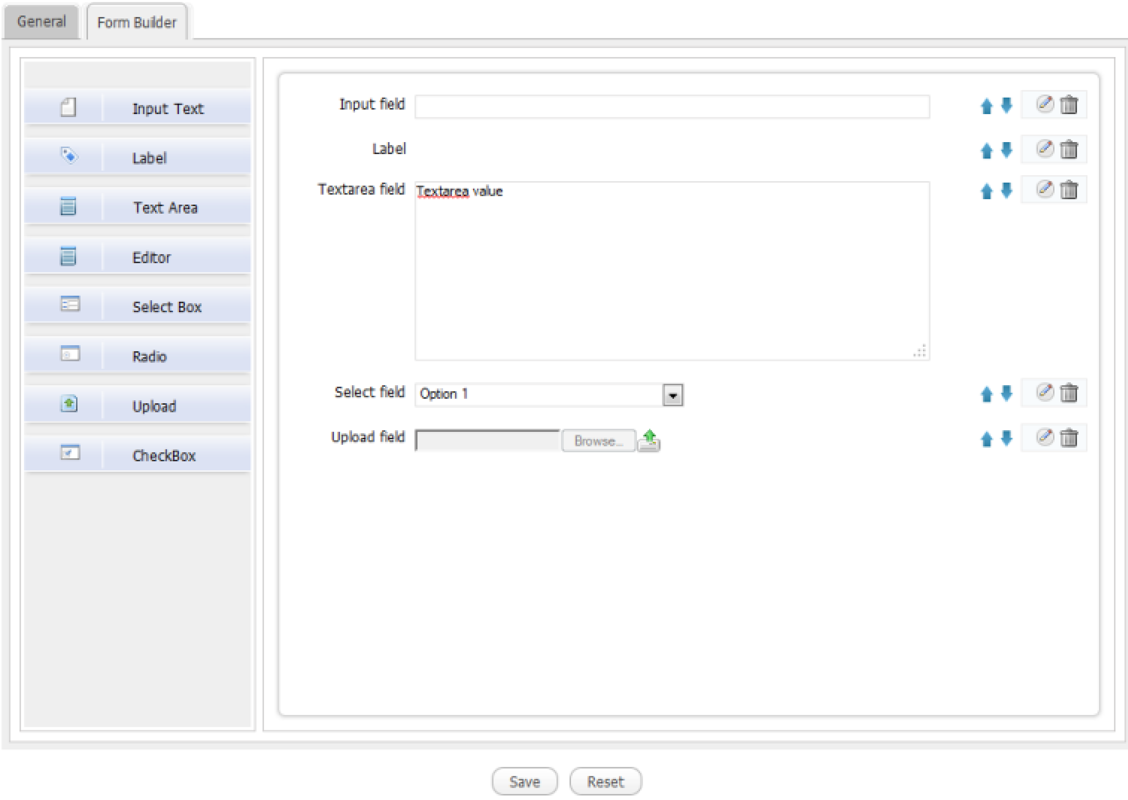
1. Open the **Form Builder** portlet.



2. Enter the template name into the **Name** field which is required.

3. Enter a brief description about the template.

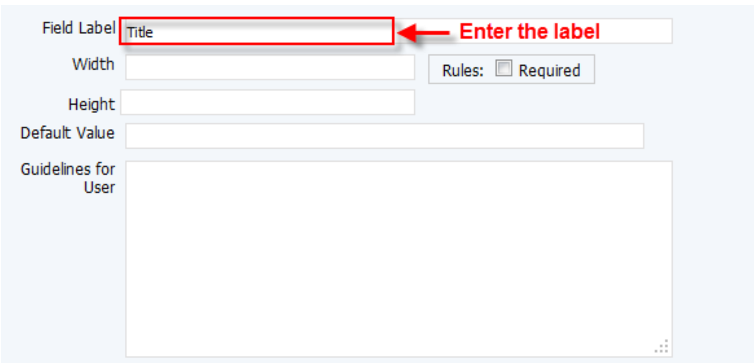
4. Click the **Form Builder** tab that allows you to set properties for the template. Available components are displayed in the left pane.



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

6. Click corresponding to the component to move this component up; or click to move the component down.

7. Click corresponding to the component to edit properties of that component. The form to edit properties appears like the illustration below.



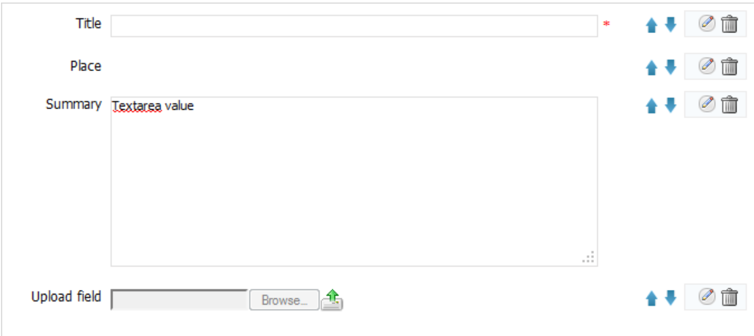
Details:

Table 4.38.

Field	Description
Field Label	The label of the field.

Field	Description
Width	The width of the field width.
Rules: ☐ Required	If the checkbox is marked, the asterisk (*) will appear beside the textbox, indicating that it is required to enter values in this field.
Height	The height of the field.
Default Value	Display the default value.
Guidelines for User	Display instructions about this component.

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



- To delete the component, click corresponding to the component.
- Click again to hide the form to edit the properties.

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

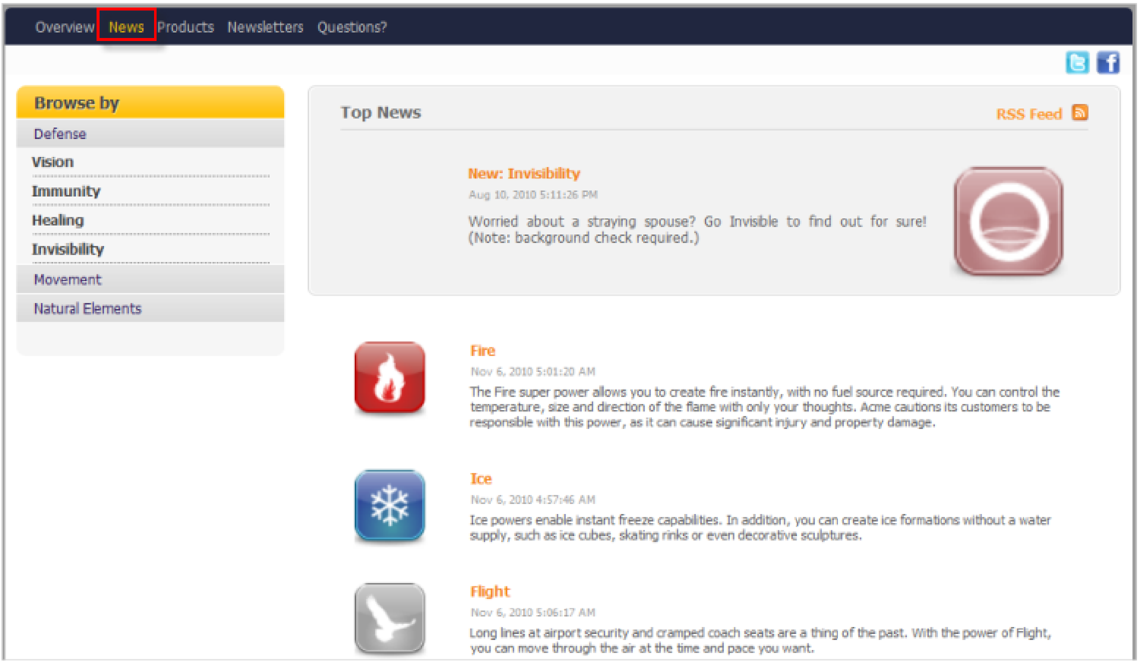
   - A message will inform that you have created the template successfully.
   - After the template has been created, you will see it in the content template list when creating content.

4.11. Manage Category Navigation

Category Navigation and **Parameterized Content List Viewer** portlets get rid of long URLs when you view content and enable users to see published documents or web content in specific categories in one page. Thanks to the symbolic link, no matter where the object physically resides, the database can retrieve it. In addition, the relations amongst shortcuts can be managed. Now, you can view documents or web content in the **Parameterized Content List Viewer** easily.

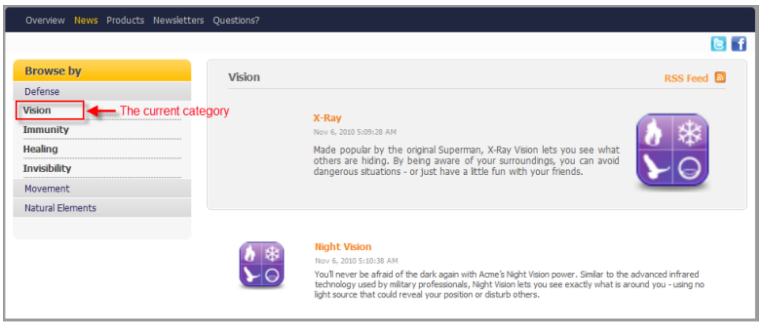
Access the Category Navigation portlet

1. Go to **News** on the **Navigation** bar.



- The left pane lists all the categories containing documents or web content.
- The right pane displays the documents selected in the left pane.

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

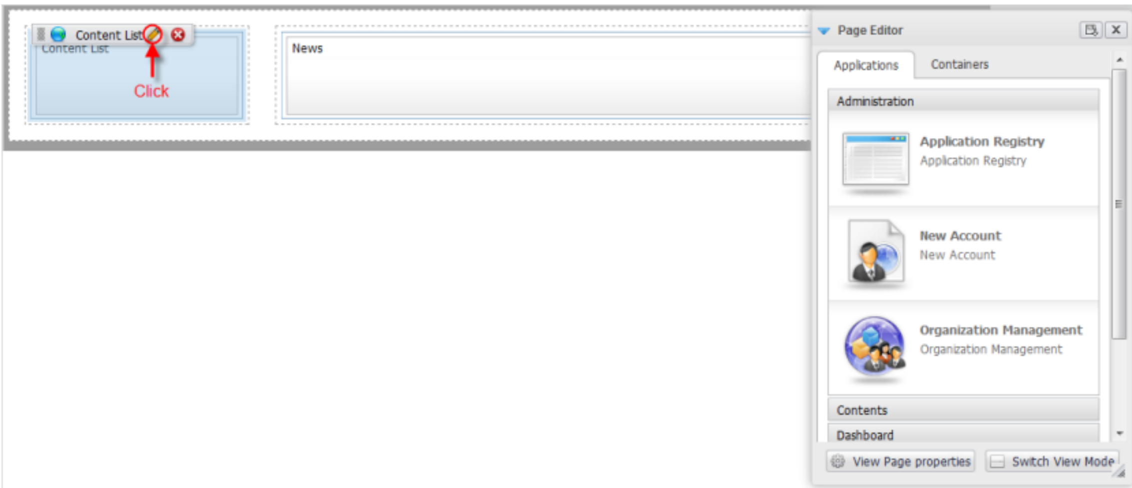


Configure Category Navigation

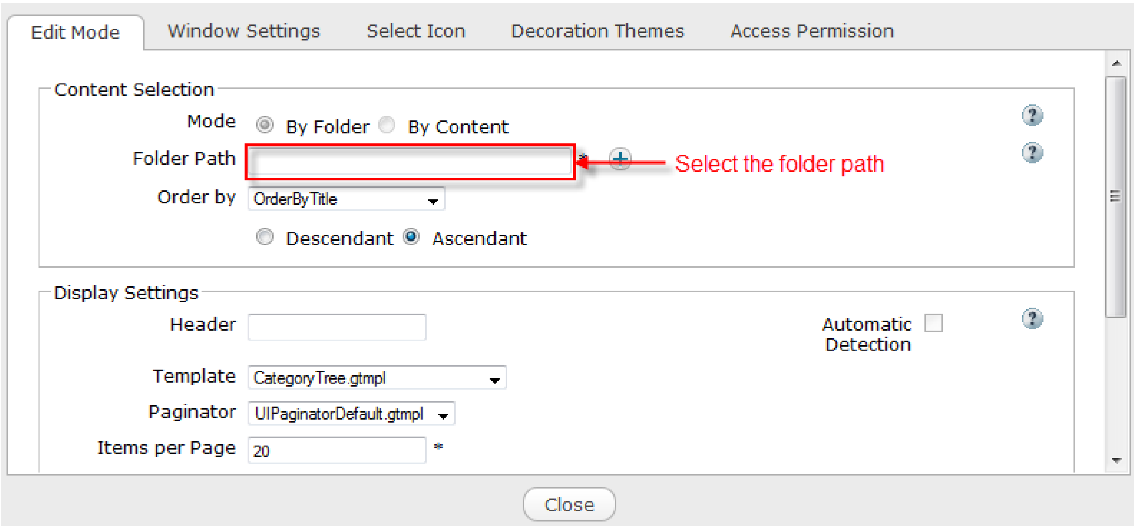
Administrators can edit the **Category Navigation** portlet as follows:

1. Open **News** page on the **Navigation** bar.
2. Hover your cursor over **Edit --> Page --> Layout**.

   The page which allows you to edit the **Category Navigation** portlet will appear.



3. Click to open a form with the **Edit Mode** tab, allowing you to edit the portlet.



4. Click to select the folder path which restores content you want do display.

5. Edit some fields in the **Display Settings** part as you want. See more details in the *Content List Preferences [51]* section.

6. Click the **Advanced** link to set up some properties for the portlet. See more details *here*.

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

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

9. Click on the **Page Editor** form to finish editing the **Category Navigation** portlet.

Note

In the **Edit Mode** tab, some options are disabled.

4.12. Manage SEO

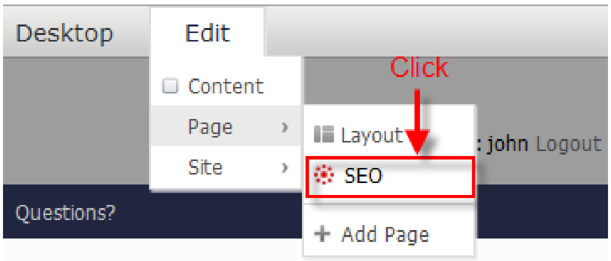
SEO (Search Engine Optimization) allows you to improve the visibility of your webpages and web content in the major search engines (Google, Yahoo, MSN, Live) via the search results. The higher your website position is in the search engine results page, the more visitors access it. Therefore, it is very important for you to maximize your webpages and content's position in the search engines.

In eXo Platform, the **SEO Management** feature is featured to meet this target. By using **SEO Management,** you can easily manage SEO data of web pages and web content and optimize your website for search engines.

Manage the SEO data

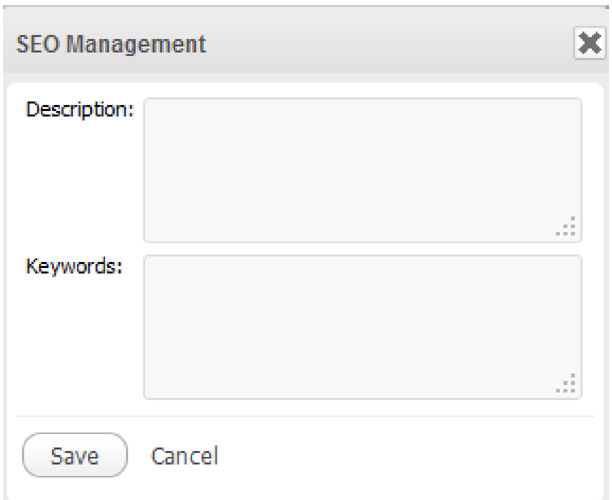
1. Open a page or content that you want to edit the SEO data.

2. Open the **SEO Management** form by hovering your cursor over **Edit --> Page --> SEO** on the **Administration** bar.

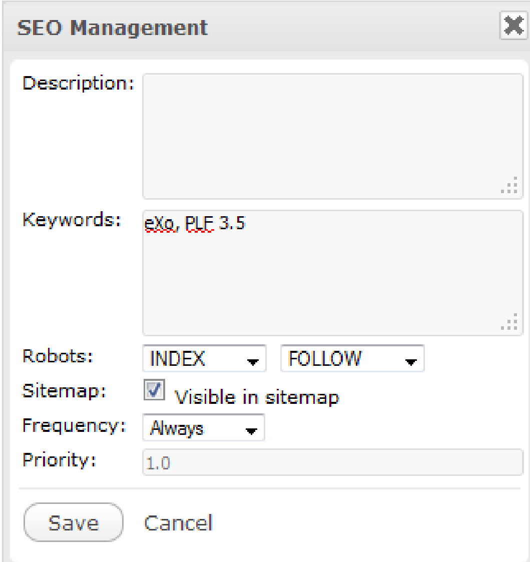


Depending on your SEO management for a page or content, the content of the **SEO Management** form will be different.

- The **SEO Management** form for content is as follows.



- The **SEO Management** form for a page is as follows.



Details:

Table 4.39.

Field	Description
Description	The description of your page/content. This description will be seen in the results list of search engines.
Keywords	By using these keywords, other users can find out your page/content via search engines.
Robots	Search engines can access the whole directories on a website, or individual pages, or individual links on a page and list your page/content or not, it depends on your options: • **INDEX:** Allow search engines to index your page/content on the search engine results page. • **NOINDEX:** Restrict search engines from indexing your page/content on the search engine results page. Use this option if you want to keep your page private. • **FOLLOW:** Allow search engines to follow links from your page to find other pages.

Field	Description
	• **NOFOLLOW:** Restrict search engines from following links from your page to find other pages. Use this option if you want to prevent spam links in comments of blogs, forums and others.
Sitemap	Allow you to see pages of the sites in the tree-like structure.
Frequency	Show how often pages are updated on the site. Also, setting your frequency levels tells the search engines which pages should be crawled over other pages. The frequency levels include: Always, Hourly, Daily, Weekly, Monthly, Yearly and Never. If you set "Never" for the frequency level, meaning that this page never gets updated, so search engines will move onto other pages that get updated more frequently.
Priority	Allow search engines to search the page with the higher priority level first. The acceptable value in this field is from 0 to 1. In which, 0 is the lowest priority level and 1 is the highest.

3. Fill out all the fields in the form.

4. Click **Save** to finish creating SEO data.

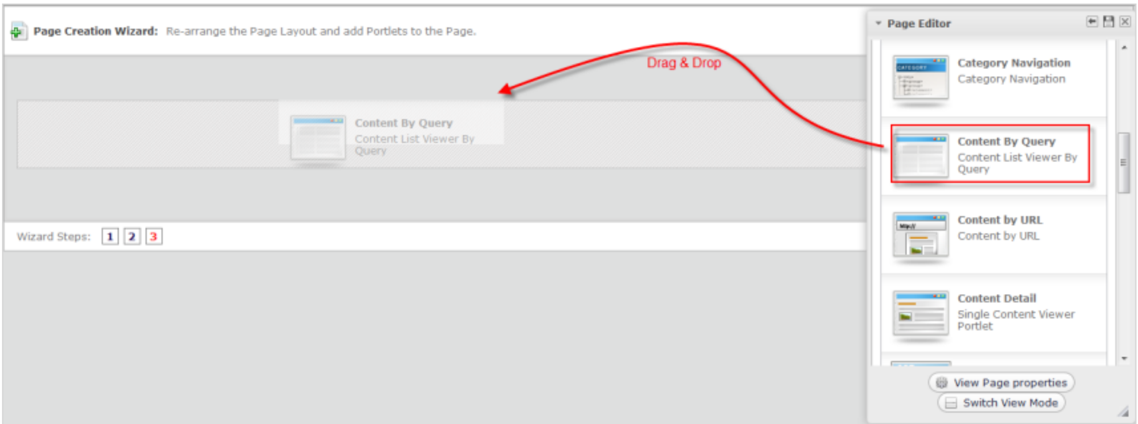
> **Note**
>
>  means that the SEO information is empty.
>
>  means that the SEO information has been updated but some information are not filled out yet.
>
>  means that the **SEO Management** form is filled out with the full SEO information.
>
>  means that the **SEO Management** feature is disabled.

4.13. Manage content list viewer by query

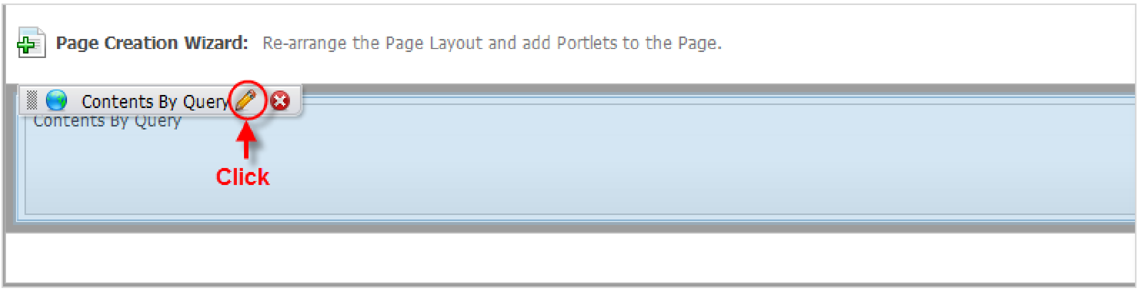
The **Content By Query** portlet allows you to collect and display data throughout a workspace by using a query instead of selecting items by a folder or by content.

To use this portlet, first you need to add the **Content By Query** portlet to a specific page as follows:

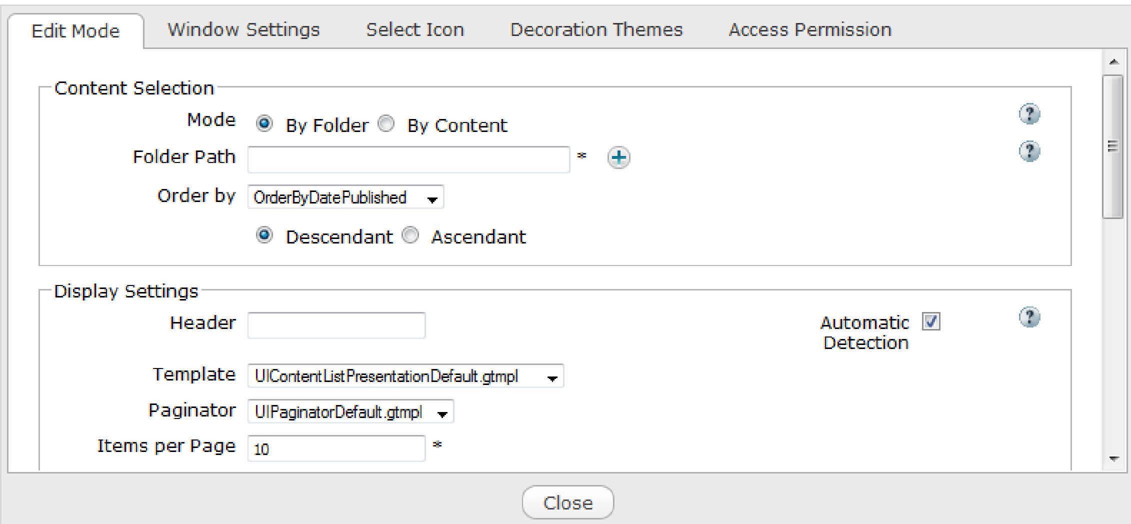
1. Drag and drop the **Content By Query** portlet from the **Page Editor --> Applications --> Content** to the main pane. You can do this step while *creating a new page* or *editing an existing page* or *editing the layout of a portal*.



2. Edit the **Content By Query** portlet by hovering your cursor over it, then click to edit the portlet.



The form with the **Edit Mode** tab appears.



3. Enter a valid query into the **by query** field to get data that you want to display.

4. Select a workspace where you want to get data.

5. Click **Save** to complete adding the **Content By Query** portlet.

6. Click to quit the **Page Editor** page and see the displayed data.

> **Note**
>
> To learn more about fields in the **Edit Mode** tab, refer to *Content List Preferences [51]*.

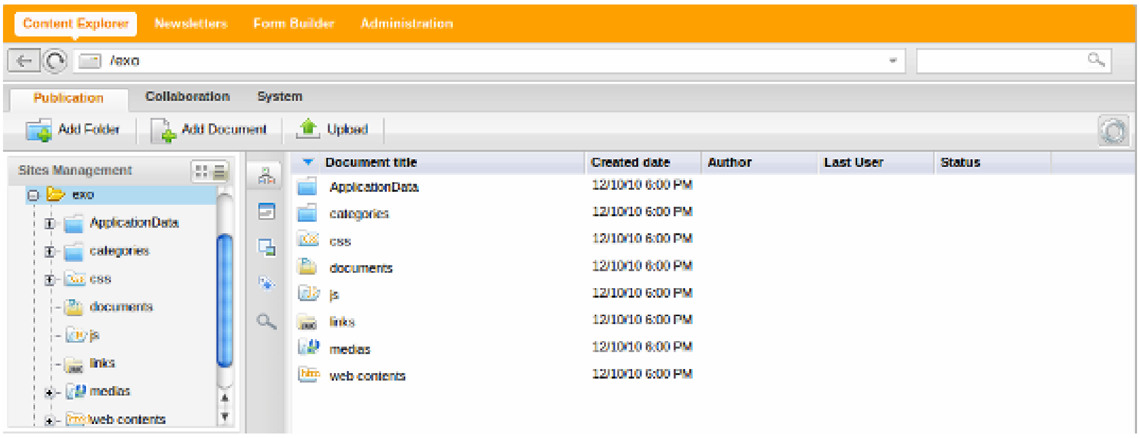
Advanced Actions

5.1. Manage Site Resources in one place

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

Chose 

in General drive. All of your created sites and their resources will be listed in the left pane.



All sites contain typical folders that are site resources:

5.1.1. CSS Folder

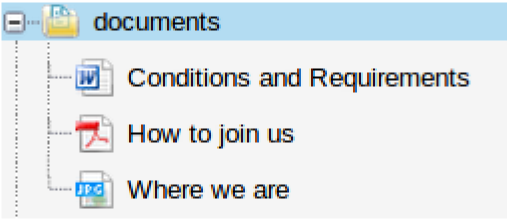
CSS is one of the default files of a site. This folder contains CSS data that is used to present data in a site and increase that site's content accessibility.

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 the red background color, the site background will then turn into 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

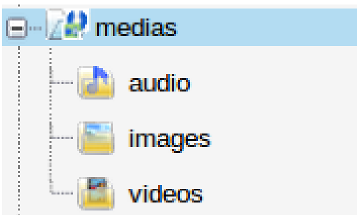
This is one of the default files of a site. This file contains Java Script data that is used to make a site more animated and more dynamic.

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:



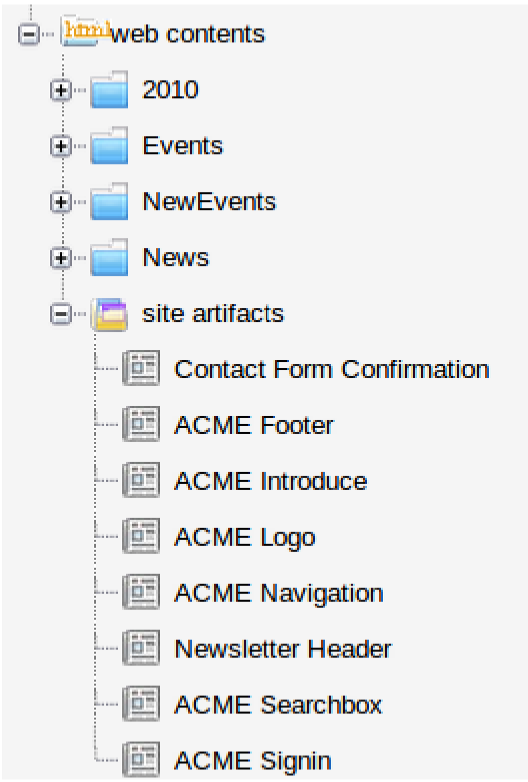
audio:
: This folder contains sound data used in a site.

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

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

5.1.6. Web Content Folders

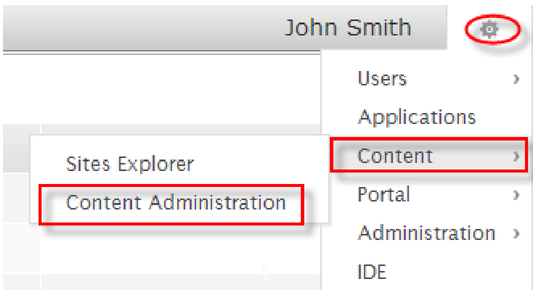
This folder contains all web content used in sites. It is recommended to put all the web content files here, to manage them more easily, or in case you want to reuse them in another site.



5.2. Content Administration

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

To access the **Content Administration** page, hover your cursor over **--> Content --> Content Administration** on the **Administration** bar.



The **Content Administration** page will appear.

From this page, you can access:

- **Categories & Tags:** Manage categories and tags.
- **Content Presentation:** Manage template, metadata, views, and drives.
- **Content Types:** Manage namespace registry, and nodetype.
- **Advanced Configuration:** Manage queries, scripts, and create an action type.

5.2.1. Categories and Tags

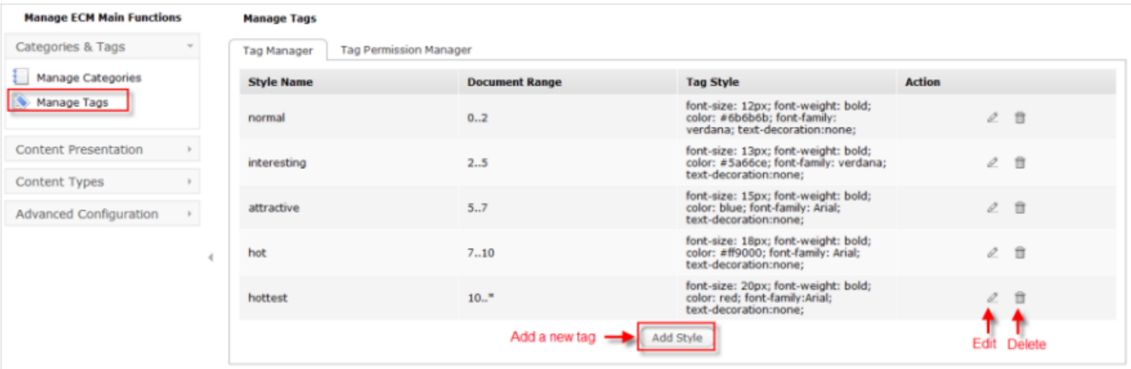
This section is divided into 2 sub-topics:

- *Manage tags*
- *Manage categories*

5.2.1.1. Manage tags

The **Manage Tags** function enables you to manage tag styles. The tag styles will change, depending on the number of documents in a tag.

By selecting **Categories & Tags --> Manage Tags**, you will be directed to the **Manage Tags** page as below:

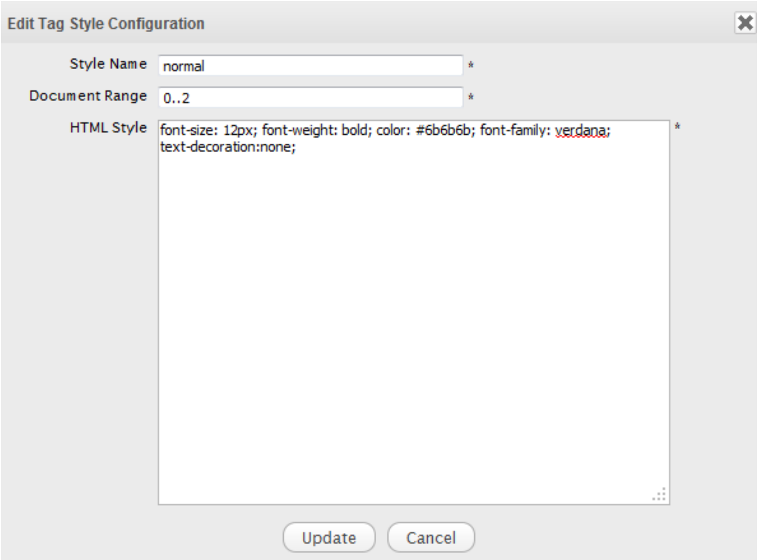


Here, you can perform the following actions:

- *Add a tag style*
- *Edit a tag style*
- *Delete a tag style*
- *Set permissions on public tags*

5.2.1.1.1. Add a tag style

1. Click the **Add Style** button. The **Edit Tag Style Configuration** form will appear.



Details:

Table 5.1.

Field	Description
Asterisk (*)	This mark next to each field means that it is required to input values.
Style Name	Give the tag name which cannot be edited.
Document Range	Give the number of document assigned to a tag.
HTML Style	Include font-size, font-weight, color, font-family, and text-decoration.

2. Input values in the fields: **Style Name, Document Range,** and **HTML Style.**

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 0-2 documents assigned to a tag), 10..* (means at least 10 documents assigned to a tag).

The 'HTML style' textbox cannot be empty. You can change values of font-size, font–weight, color, font-family, and text-decoration.

5.2.1.1.2. Edit a tag style

The **Tag Manager** tab enables you to edit the existing tags.

Edit an existing tag

1. Click corresponding to the tag name which you want to edit in the **Action** column to edit the tag style configuration. The **Edit Tag Style Configuration** form appears which is similar to that of adding a tag style.

2. Change values in the fields, including **Document Range** and **HTML Style**, except **Style Name.**

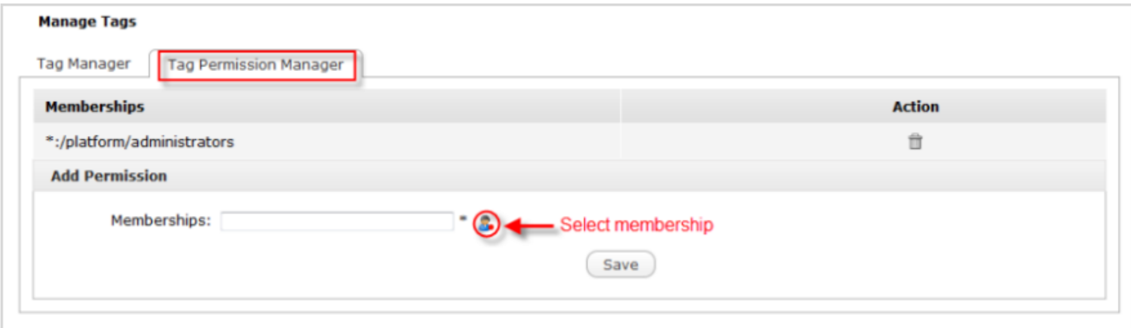
3. Click **Update** to save new changes.

5.2.1.1.3. Delete a tag style

To delete one tag style, simply click the corresponding **Delete** icon and select **OK** in the confirmation to accept your deletion.

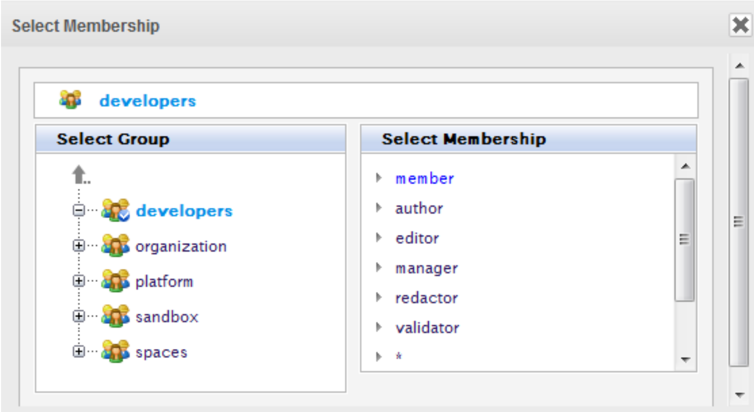
5.2.1.1.4. Set permissions on public tags

The **Tag Permission Manager** tab helps you set permissions regarding to editing and deleting public tags.



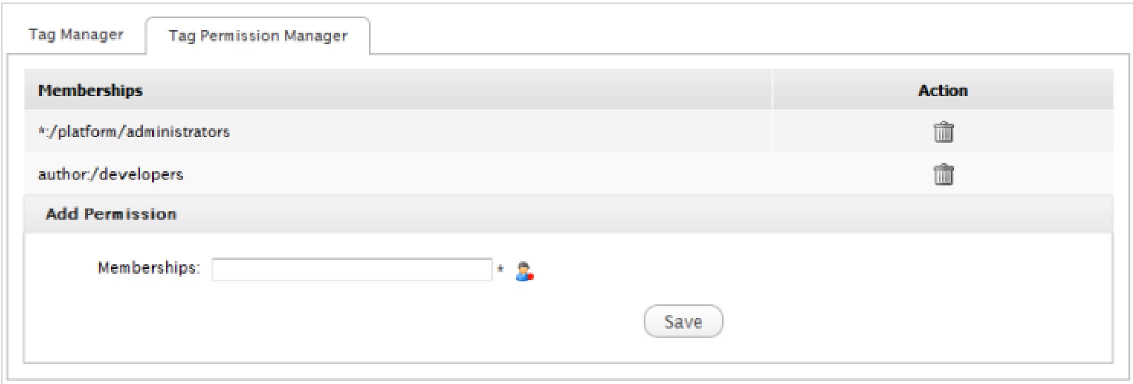
Set Permission To Tag Management

1. Click beside the **Memberships** field to select memberships to add a permission to 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 accept adding a permission for the membership to the **Memberships** column.

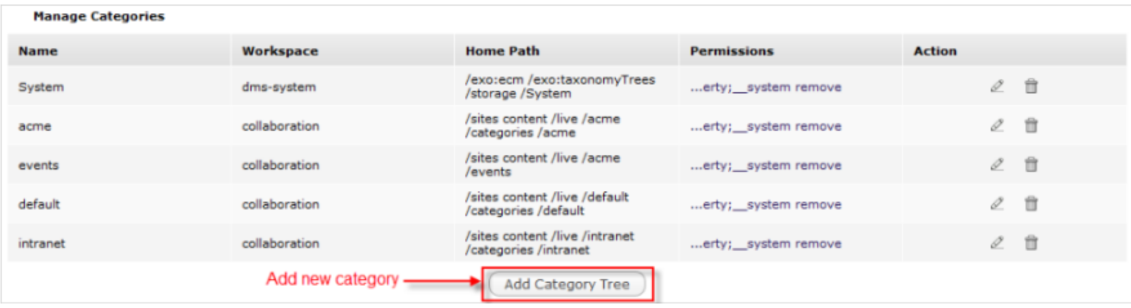


You can also delete memberships that have permissions by clicking regarding to that membership, then click **OK** in the confirmation message.

5.2.1.2. Manage categories

A category can be understood as a classification practice and science. It is used to sort documents, aiming at facilitating searches. The category management includes adding, editing and deleting a category tree.

By selecting **Categories & Tags --> Manage Categories**, you will be directed to the **Manage Categories** page as below:

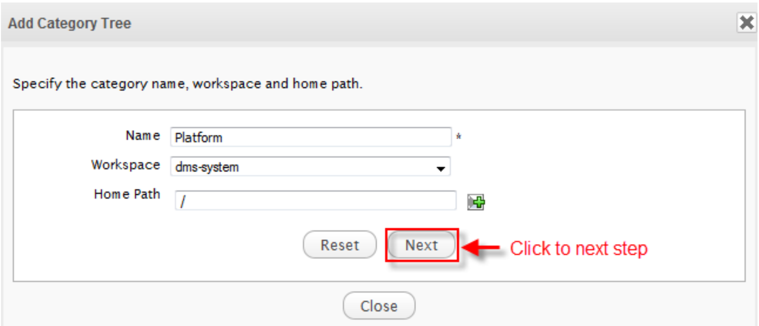


Here, you can do the following actions:

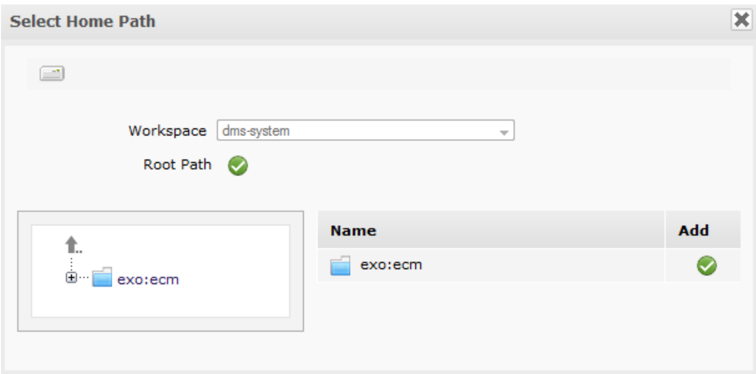
- *Add a category tree*
- *Edit a category tree*

5.2.1.2.1. Add a category tree

1. Click the **Add Category Tree** button to add a new category. The **Add Category Tree** form will appear.



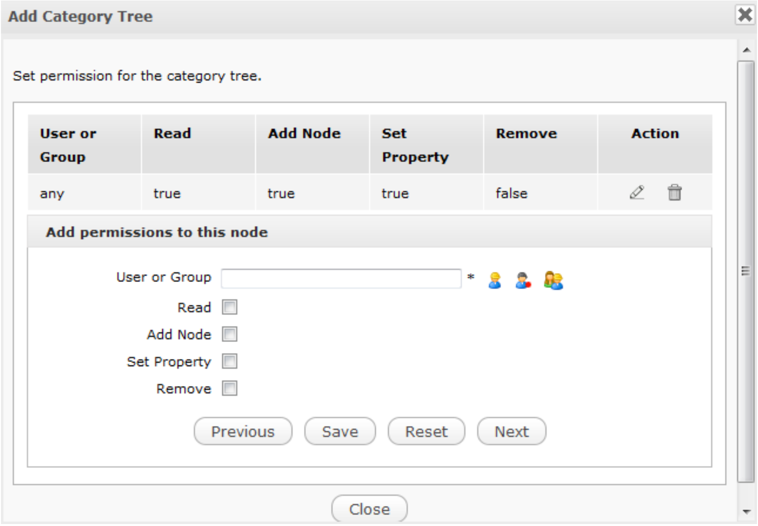
2. Enter the category tree name in the **Name** field which is required.
3. Select the workspace you want to work with.
4. Select the home path by clicking . The **Select Home Path** form will appear.



   - Click next to **Root Path** if you want to select the root path or;
   - Click the arrow icon to go to the up level path and click the plus sign to expand the folder in the left pane.

     Click corresponding to the path that you want to select as a home path.

5. Click **Reset** if you want to reset values that have just been selected or **Next** to select permissions for a category tree.



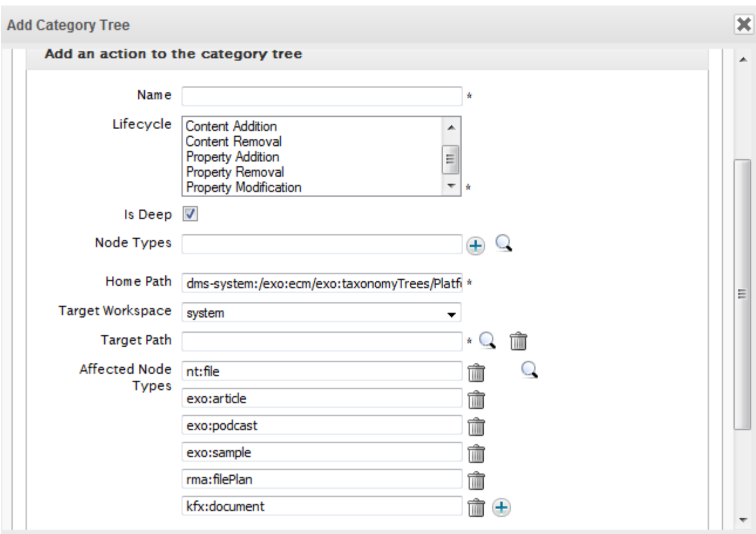
i. Click to select a user or to select memberships or to select everyone to set permissions. The user or membership that you have just selected will be displayed in the **User or Group** field.

ii. Check at least one of these below options to set rights for the selected user to membership:

Table 5.2.

Field	Description
Read Right	Select the **Read** right or not.
Add Note Right	Select the **Add Node** right or not.
Set Property Right	Select the **Set Property** right or not.
Remove Right	Select the **Remove** right or not.

6. Click **Save** to save all values, or **Reset** to change values that have just been set. After clicking **Save**, click **Next** to go to the next step.



7. Enter the name for an action of the category tree in the **Name** field which is required.

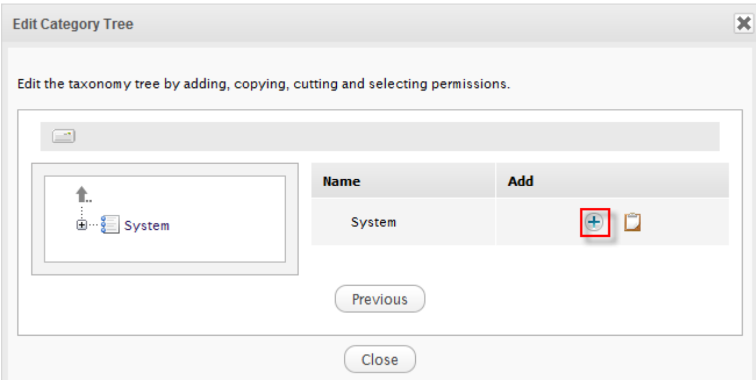
8. Select values for **Lifecycle, Node Types, Target Workspace, Target Path, Affected Node Types** which are required.

9. Click **Save** to save all values, then select **Next** to go to the next step.

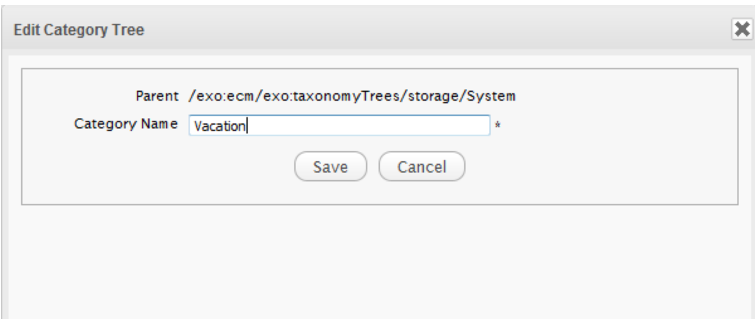
> **Note**
>
> Do not input some special characters into the **Name** field, such as: !,@,#,$,%,&,*,(,).
>
> Do not add a category which has the same name and level with existing taxonomies in a node.
>
> The category name must contain less than 30 characters.

5.2.1.2.2. Edit a category tree

1. Click corresponding to the category tree you want to edit.



2. Click in the **Add** column to add more category trees. The **Edit Category Tree** form will appear.



3. Enter a category name in the **Category Name** field which is required.

4. Click **Save** to save the category name.

5. Click **Previous** to return to the previous steps.

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

> **Note**
>
> You can delete a category by clicking corresponding to the category that you want to delete. Click **OK** in the confirmation message to accept your deletion.
>
> You cannot delete categories that have been referenced.

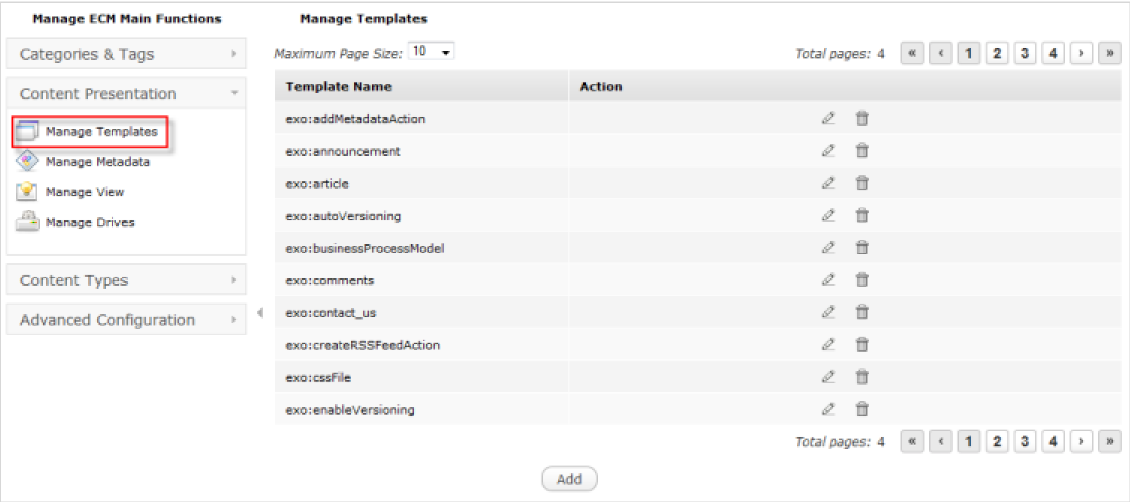
5.2.2. Content Presentation

This section is divided into 4 sub-topics:

- *Manage a template*
- *Manage metadata*
- *Manage views*
- *Manage drives*

5.2.2.1. Manage a template

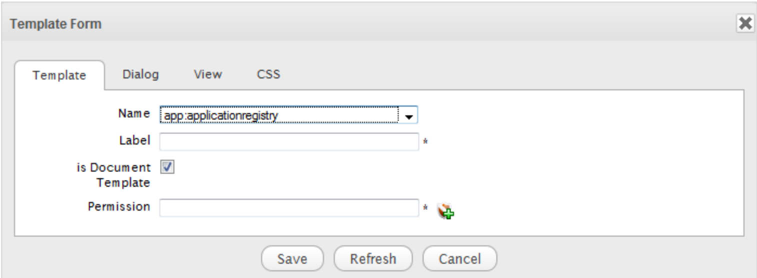
When creating a node in eXo Platform, you must set its properties. Thus, each node needs to have a form to enter data for their properties (called the **Dialog** template), and display the existing values (called the **View** template). The template management allows users to view, delete and modify the predefined templates or to add a new template.



Add a new template

1. 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 from the **Name** drop-down menu.

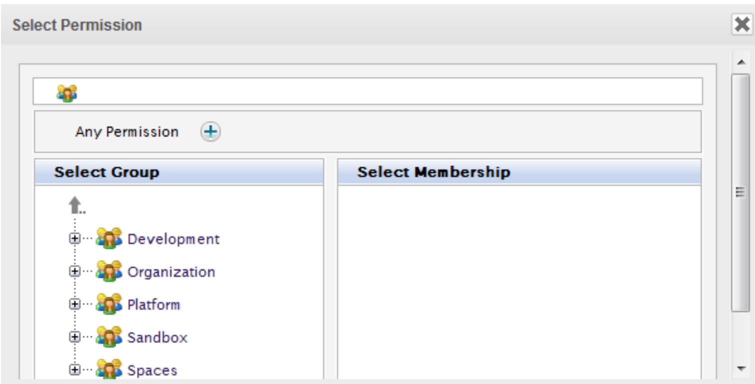
4. Specify a name for the template in the **Label** field. It is required.

5. Select the **is Document Template** checkbox if you want your created template to become a template for a document.

6. Click next to the **Permission** field to open the **Select Permission** dialog. It is required.

   - Select the group from the left pane and the membership from the right pane;

   - Or, you can set permissions for everyone by clicking next to **Any Permission.**



7. Optionally, select the **Dialog** tab and enter the value in the **Dialog Content** field.

8. Optionally, select the **View** tab and enter the value in the **View Content** field.

9. Optionally, select the **CSS** tab and enter the value in the **CSS Content** field.

10. Click **Save** to create the template.

Edit a template

1. Click **Content Presentation --> Manage Templates.**
2. Click in the **Action** column, corresponding to the template you want to edit.
3. Make changes on the values of each tab, including:

- In the **Template** tab, you can edit the label of the template.
- In the **Dialog** tab, you can do the followings:

Add a dialog

i. Input content for this dialog in the **Content** field.

ii. Input the name for this dialog that is required.

iii. Select permissions for a group that can use this dialog that is required.

Edit an existing dialog

i. Click in the dialog row you want to edit.

ii. Edit the dialog properties.

iii. Click **Save** to accept all changes in the **Dialog** tab.

Delete an existing dialog

i. Click in the dialog row you want to edit.

ii. Click **OK** to accept your deletion.

> **Note**
>
> You cannot delete the default dialog. You must create a new one before you can delete the current default dialog.

- In the **View** tab, you can do the followings:

Add a view

i. Enter content into the **Content** field.

ii. Input name for this view that is required.

iii. Select permissions for a group that can use this view that is required.

Edit an existing view

i. Click in the **Actions** column, corresponding to the view you want to edit.

ii. Edit the view properties.

iii. Click **Save** to accept all changes in the **View** tab.

> **Note**
>
> You cannot change the view name.
>
> If you click **is Enable Version** checkbox, this view automatically increments one version after you have clicked **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.

Delete an existing view

i. Click in the **Actions** column, corresponding to the view you want to delete.

ii. Click **OK** to accept your deletion.

iii. Click **Save** to accept all changes.

Delete a template

1. Click corresponding to the template you want to remove in the **Manage Templates** page.
2. Click **OK** in the confirmation message to accept your deletion.

5.2.2.2. Manage metadata

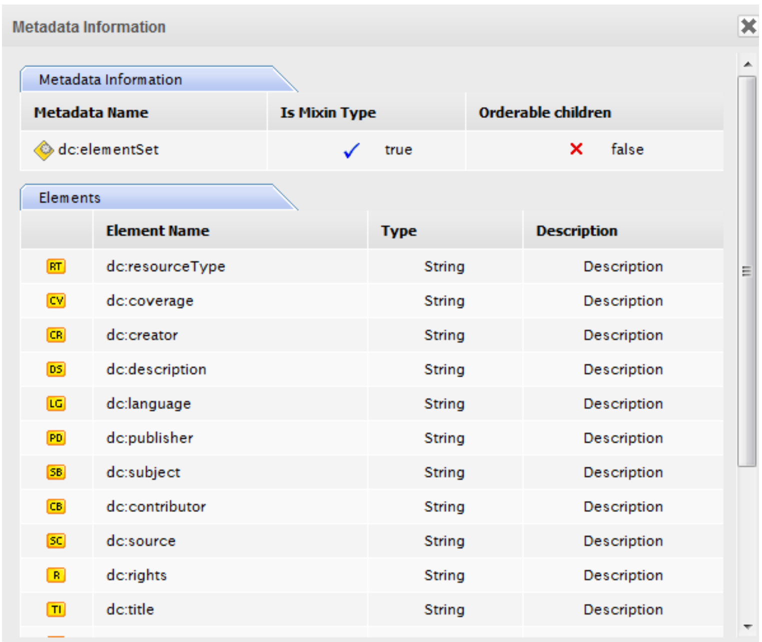
Metadata is generally defined as "data about data". Metadata is information which describes, or supplements the central data. In the **Manage Metadata** tab, you can manage nodes in the metadata format in the eXo Platform system. The metadata may be considered as information used to describe the data. When data are provided to end-users, the metadata allows users to understand about information in more details. All metadata nodes can combine with other nodes to create a new node (add mix).

View metadata

1. Click **Content Presentation --> Manage Metadata.**

2. Click corresponding to the metadata you want to view.

   The **Metadata Information** form will open.



Edit metadata

1. Click in the **Template's Actions** column, corresponding to the metadata you want to edit.

   The **Edit Metadata's Template** form will open.

2. Change the required properties of the metadata.

> **Note**
>
> You cannot edit the metadata name.

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

Delete metadata

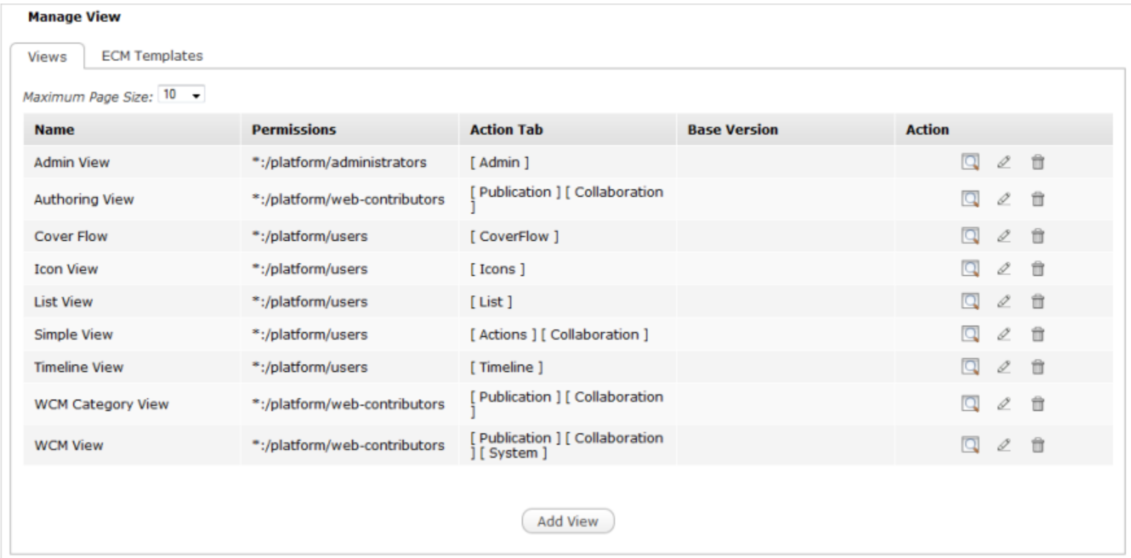
1. Click corresponding to the metadata you want to delete.

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

5.2.2.3. Manage views

The **Manage View** function is used to control view ways of a user. It has two tabs: **View** and **ECM Templates**

To open the **Manage View** function, click **Content Presentation --> Manage View.** The **Manage View** form displays.



Here, you can do many actions through 2 tabs:

- *Views tab*
- *ECMS Templates tab*

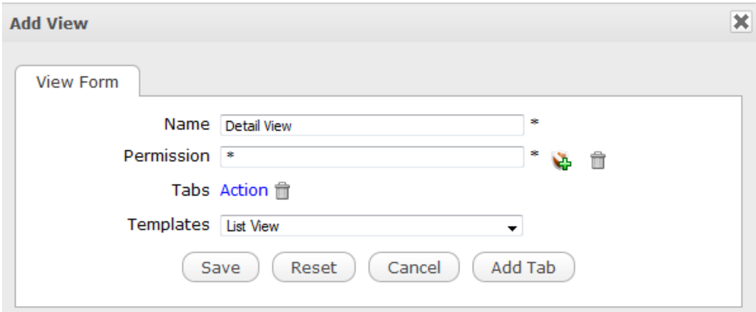
5.2.2.3.1. Views tab

In this tab, you can add, edit, delete, and preview views.

Add a view

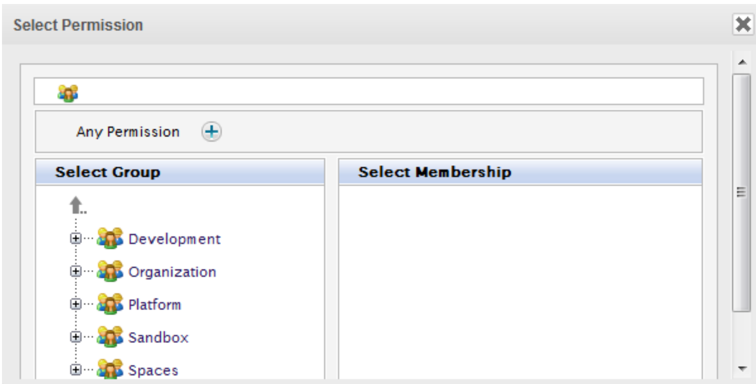
1. Click the **Add View** button located at the bottom of the **Manage View** form.

   The **Add View** form will open.



2. Specify the view name in the **Name** field that must be unique, and only contains standard alphanumeric characters. It is required.

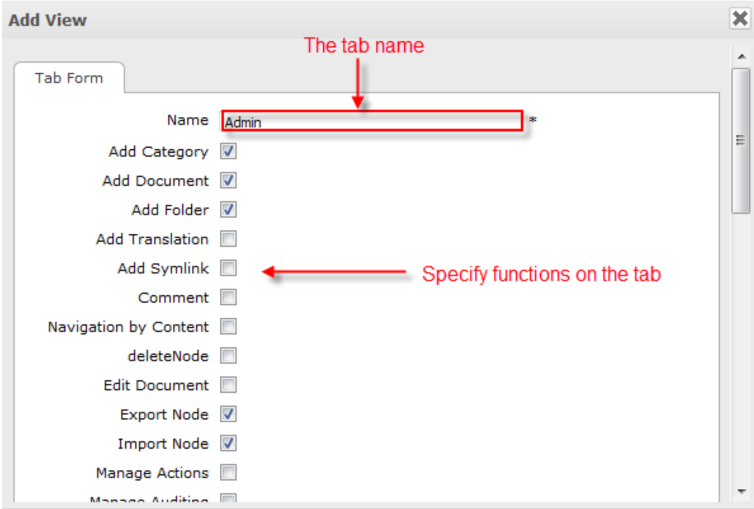
3. Set permissions for the view by clicking the plus icon. It is required.



- Click next to **Any Permission** to assign permission to every one;
- Or, select a group from the left pane and the membership from the right pane.

4. Click the **Templates** field and select a template from the drop-down menu for this view.

5. Click the **Add Tab** button to create a functional tab on this view. It is required.



i. Enter the name for the tab in the **Name** field.

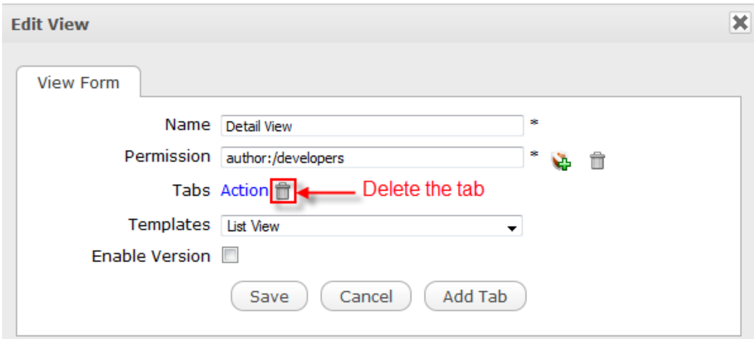
ii. Specify functions to add to the tab.

iii. Click **Save** to finish creating a tab;

Or, click **Reset** to clear the **Tab** form;

Or, click **Back** to return to the **View Form** tab of the **Add View** form.

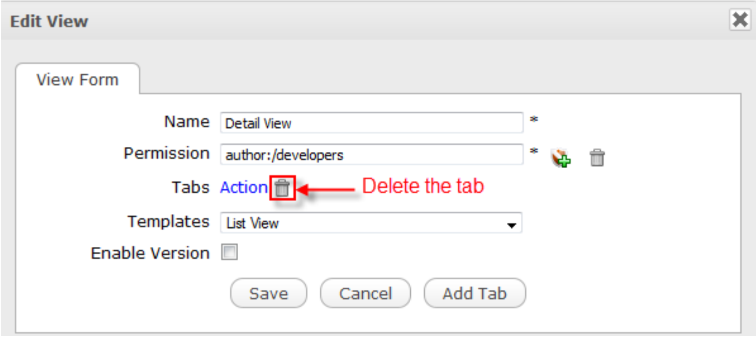
The newly created tab is displayed on the **Tabs** field.



6. Click **Save** to apply all settings and close the form.

Edit a View

1. Click in the **Action** column, corresponding to the view you want to edit.



2. Edit the view properties.

> **Note**
>
> You cannot change the view name.
>
> If you select the **Enable Version** checkbox, this view automatically increases to one version after you click **Save**. It is displayed at the **Base 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. Optionally, click the **Add Tab** button to open the **Tab Form** tab that allows you to add more Tabs to the View.

4. Optionally, click an added **Tab** to add or remove functions on it. Note that you cannot change the tab name.

5. Click **Save** to apply all changes in the **View** tab.

Delete a view

1. Click corresponding to the view you want to delete in the **Manage View** page.

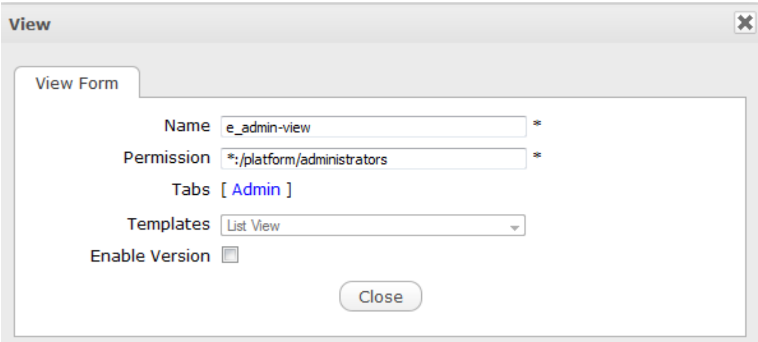
2. Click **OK** to delete the view in the confirmation message.

> **Note**
>
> You cannot delete a view which is in use.

Preview a view

1. Click in the **Action** column of the view you want to preview.

   The **View** form will open.

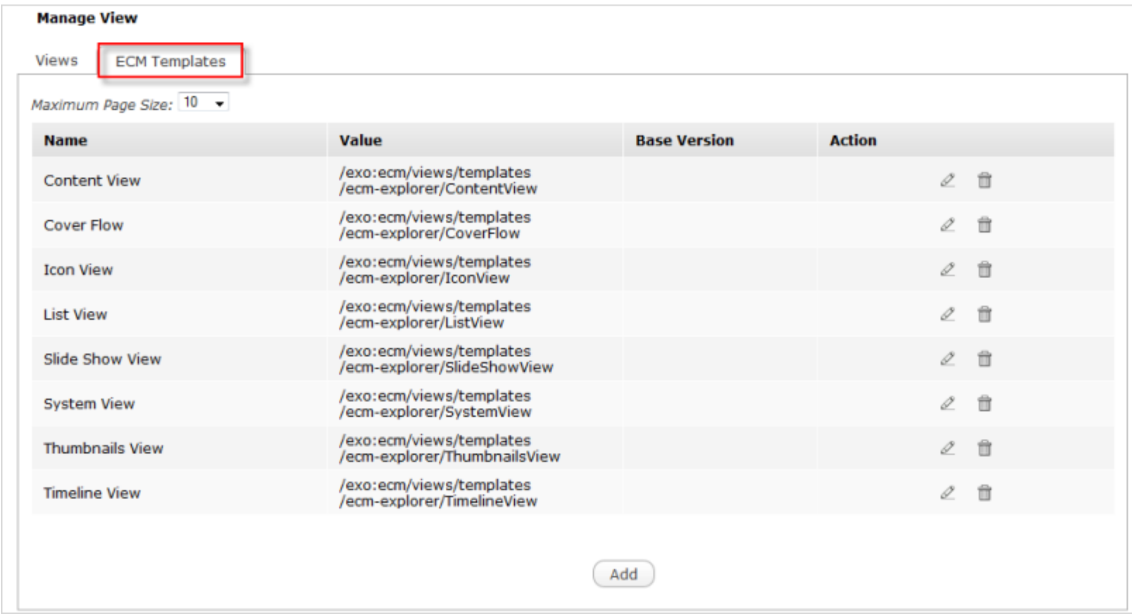


2. Click **Close** to exit the **View** form.

5.2.2.3.2. ECM Templates tab

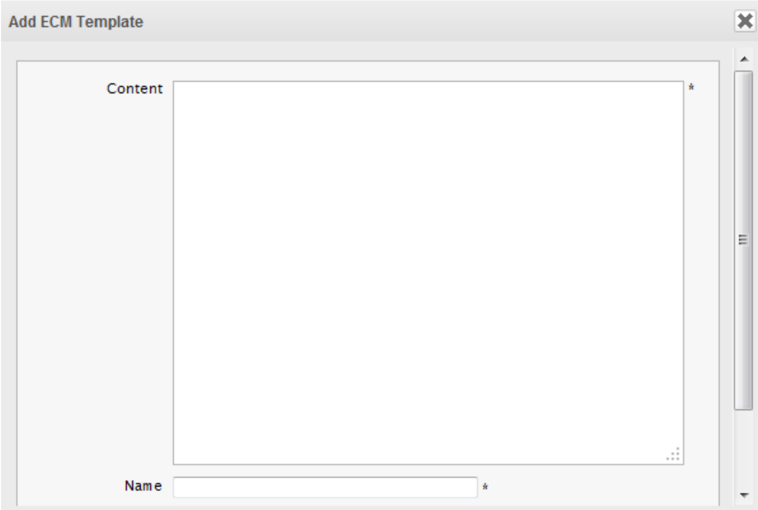
Add a new ECM Template

1. Select the **ECM Templates** tab.



Name	Value	Base Version	Action
Content View	/exo:ecm/views/templates /ecm-explorer/ContentView		
Cover Flow	/exo:ecm/views/templates /ecm-explorer/CoverFlow		
Icon View	/exo:ecm/views/templates /ecm-explorer/IconView		
List View	/exo:ecm/views/templates /ecm-explorer/ListView		
Slide Show View	/exo:ecm/views/templates /ecm-explorer/SlideShowView		
System View	/exo:ecm/views/templates /ecm-explorer/SystemView		
Thumbnails View	/exo:ecm/views/templates /ecm-explorer/ThumbnailsView		
Timeline View	/exo:ecm/views/templates /ecm-explorer/TimelineView		

2. Click the **Add** button to open the **Add ECM Template** form.



3. Input the content of the template in the **Content** field.
4. Input a name for the template in the **Name** field.
5. Select a type for the template in the **Template Type** field.
6. Click **Save** to accept adding a new template.

Edit a template

1. Click next to the template you want to edit.
2. Change the current template's properties.
3. Click **Save** to accept all changes.

> **Note**
>
> You cannot edit the template name.
>
> If you tick the **Enable Version** checkbox, this template will automatically increase to 1 version after you have clicked **Save**. It is displayed at the **Base Version** column in the **ECMS 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.

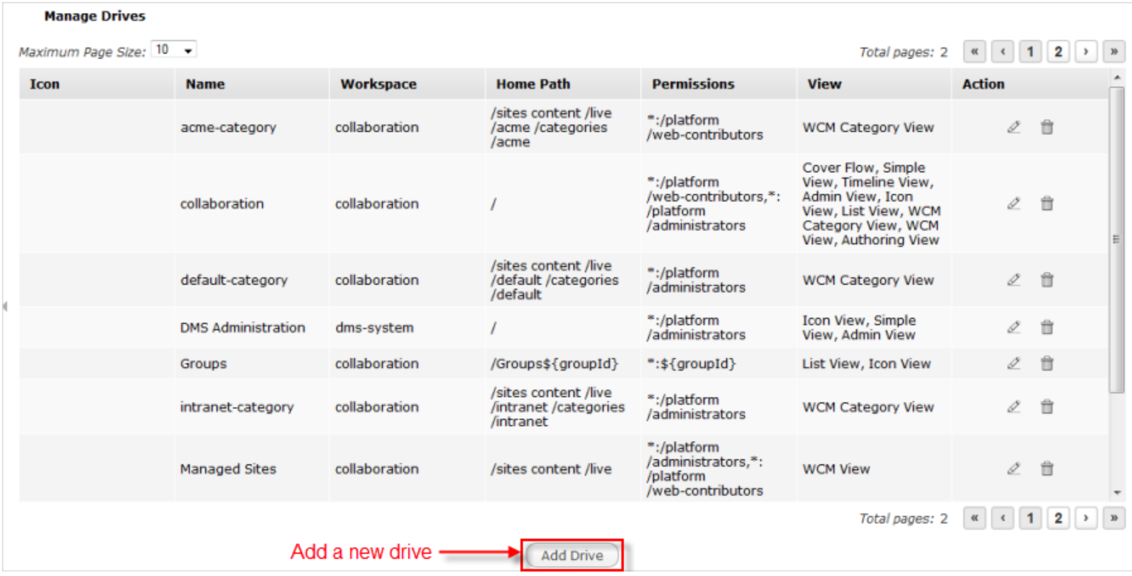
Delete a template

1. Click corresponding with the template you want to delete.
2. Click **OK** in the confirmation message to accept your deletion.

5.2.2.4. Manage drives

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

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

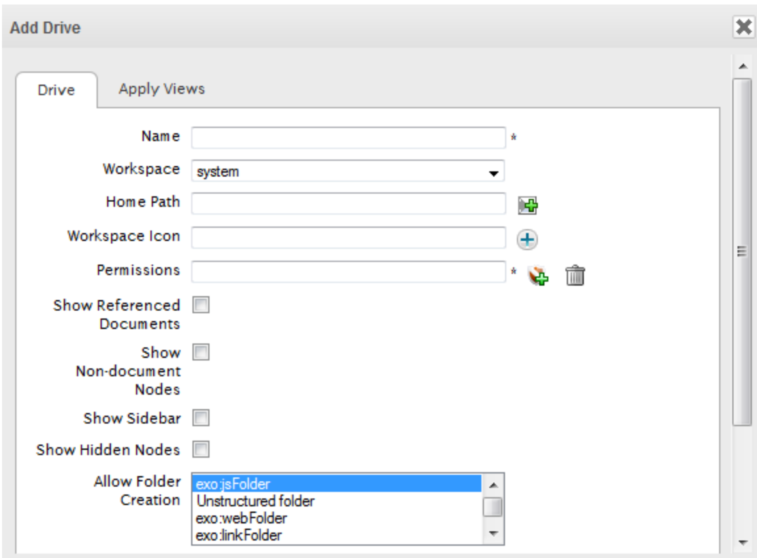


Here, you can do certain actions on the drives as follows:

- *Add a new drive*
- *Edit a drive*
- *Delete a drive*

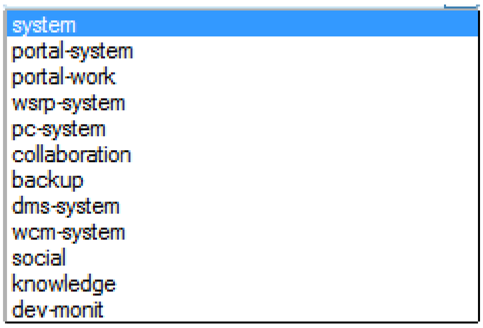
5.2.2.4.1. Add a new drive

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

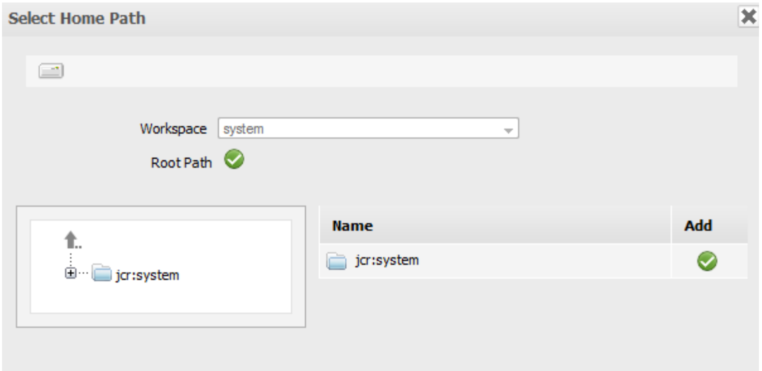


2. Input a name for the new drive in the **Name** field that is required.

3. Select a workspace for the drive from the drop-down menu by clicking the **Workspace** entry.

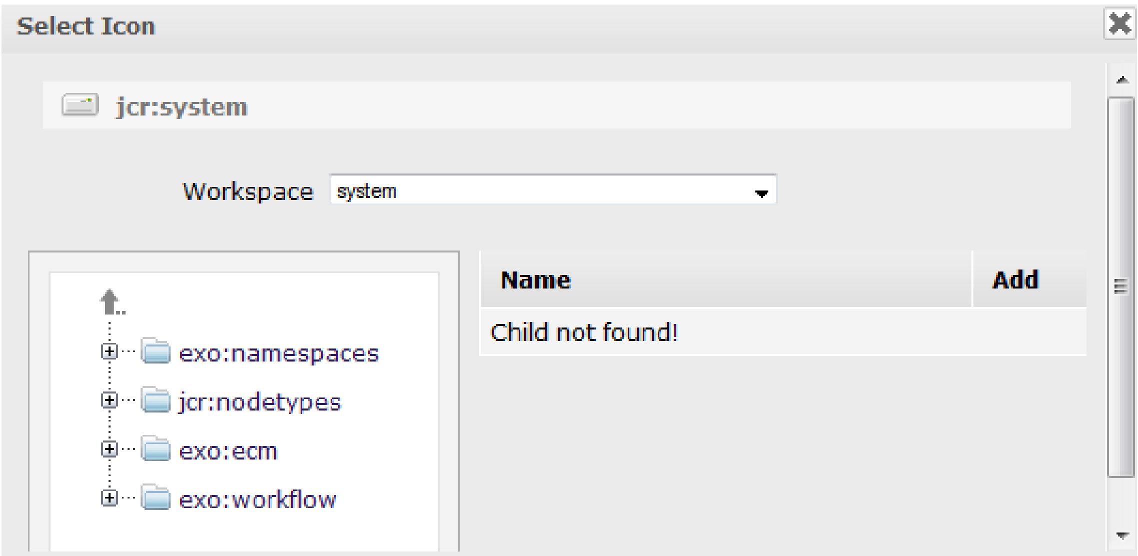


4. Select the home path for the drive by clicking beside the **Home Path** entry.



5. Browse an icon for the workspace by clicking beside the **Workspace Icon** entry.

   Select an icon by clicking corresponding to your desired icon file.



6. Select permissions for groups that have access rights to this drive by clicking beside the **Permissions** entry.

7. Select or deselect the various checkboxes to hide or show the drive elements respectively.

   Show Referenced Document
   : Allow viewing preference documents.

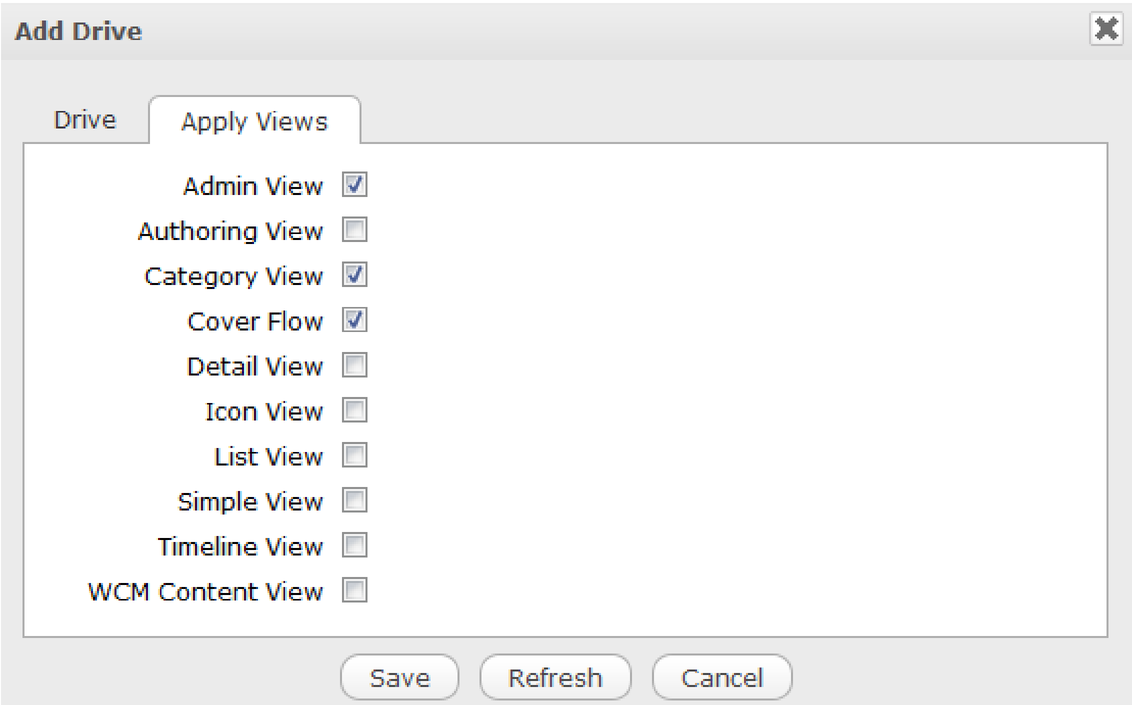
   Show Non-document Nodes
   : Allow viewing non-documents.

   Show Sidebar
   : Allow showing the sidebar.

   Show Hidden Node
   : Allow showing the hidden nodes.

8. Select the document type that will be created in this drive.

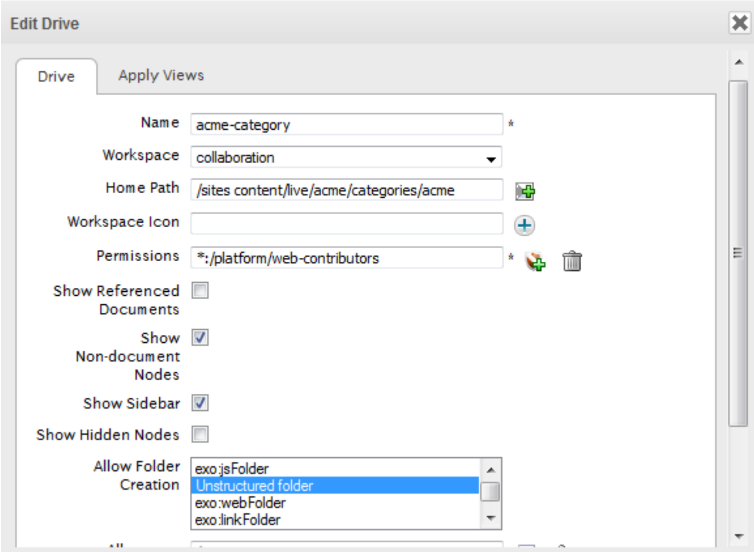
9. Select the **Apply Views** tab and select the view types you want to be available in the drive.



10. Click **Save** to complete creating the new drive, or **Refresh** to clear the form.

5.2.2.4.2. Edit a drive

1. Click corresponding 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.

> **Note**
>
> The drive name cannot be edited in this form.

5.2.2.4.3. Delete a drive

1. Click that corresponds to the drive you want to delete.

2. Click **OK** to delete the drive in the confirmation message.

5.2.3. Content Types

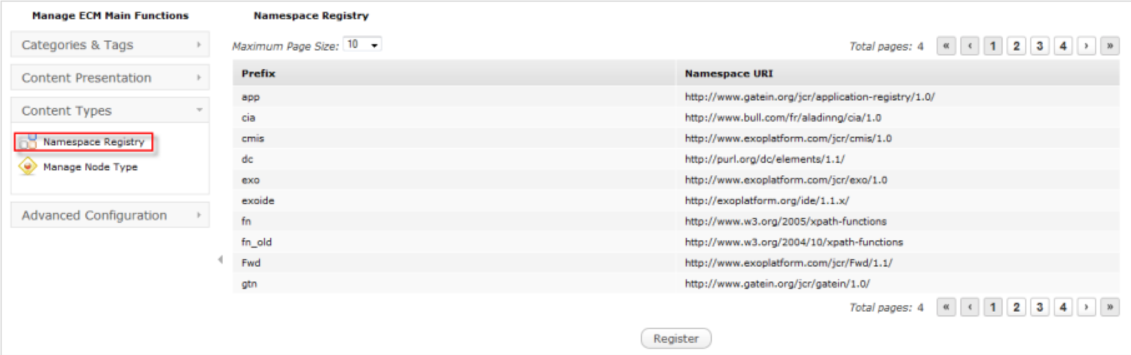
This section is divided into 2 sub-topics:

- *Namespace registry*
- *Manage node types*

5.2.3.1. Namespace registry

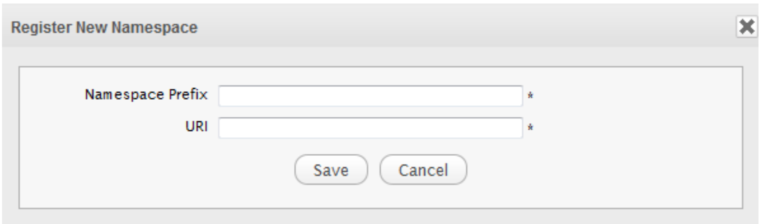
The namespace is a prefix in the node type name. It enables you to create node types without fearing any conflict with existing node types. The registry helps you manage the namespaces used in the system.

Select **Content Types --> Namespace Registry** to open the **Namespace Registry** form.



Register a namespace

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



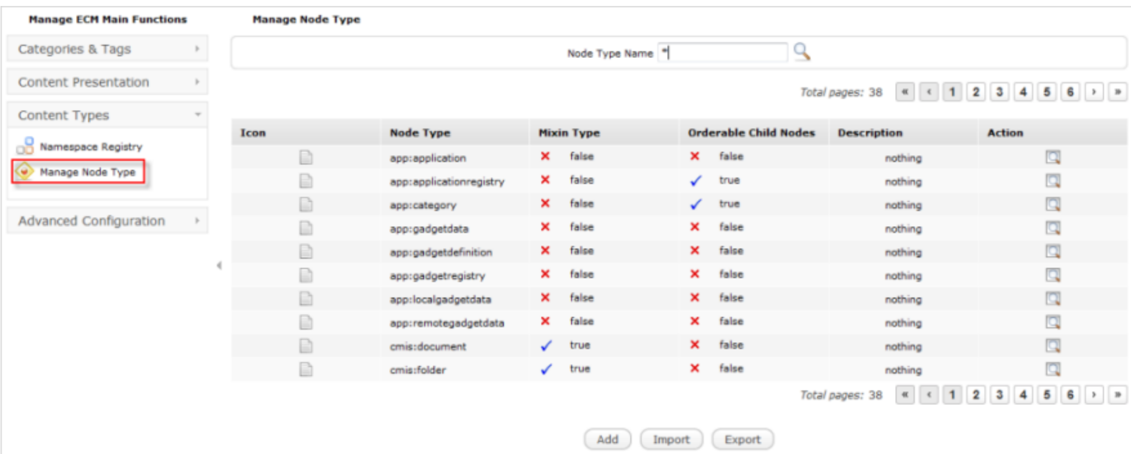
2. Enter the value for the **Namespace Prefix** field that is required.

3. Enter the value for the **URI** field which must be unique and required.

> **Note**
>
> The namespace must not contain special characters, such as !,@,#,$,%,&,*,(,).

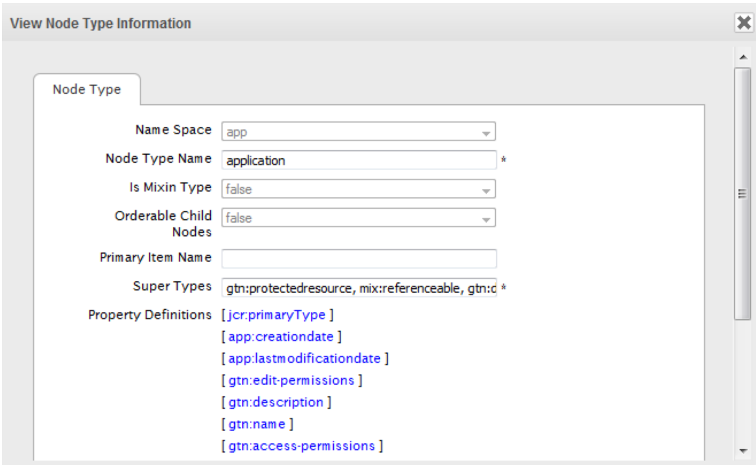
5.2.3.2. Manage node types

This function is used to control all node types in eXo Platform.



View node types

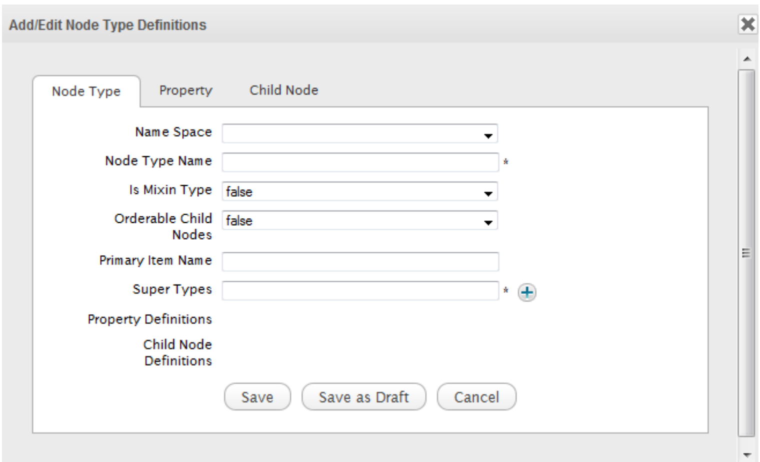
1. Click that corresponds to the node you want to view. The **View Node Type Information** form will appear.



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

Add a node type

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



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.

> **Note**
>
> The name must not contain special characters, such as !,@,#,$,%,&,*,(,).

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.

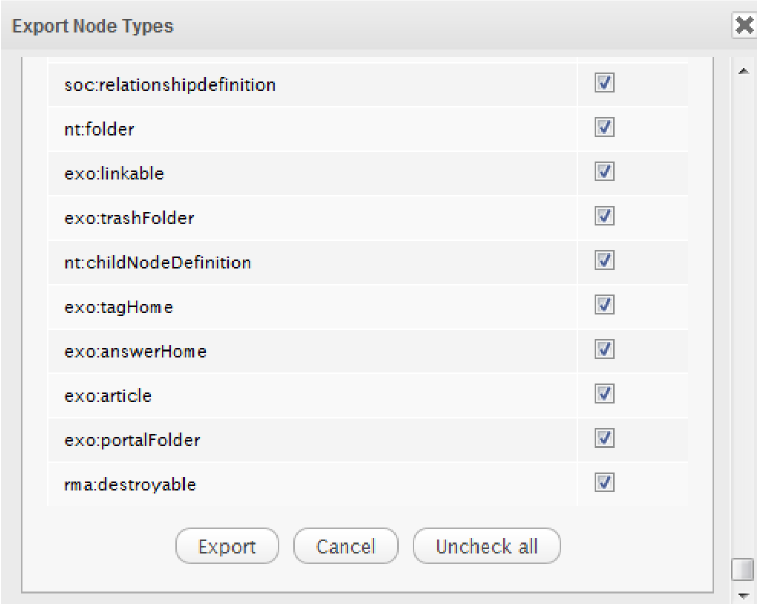
7. Click to add more parent types in the **Super Types** field.

   - **Property Definitions**: List all definition names of the **Property** tab.
   - **Child Node Definitions**: List all definition names of the **Child Node** tab.

8. Click **Save** to accept adding a new node type, or **Save as Draft** to save this node type as draft.

Export Node Types

1. Open the **Export Node Types** form by clicking the **Export** button at the bottom of the **Manage Node Type** page.



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.

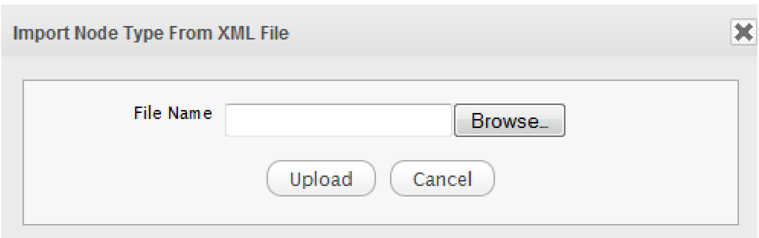
4. Click the **Export** button in this form.

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

> **Note**
>
> You must select at least 1 node type to be exported. If you do not want to export the node, click **Cancel** to quit this pop-up.

Import Node Types

1. Open the **Import Node Type From XML File** form by clicking the **Import** button at the bottom of the **Manage Node Type** page.



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

> **Note**
>
> 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 another file, click 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.

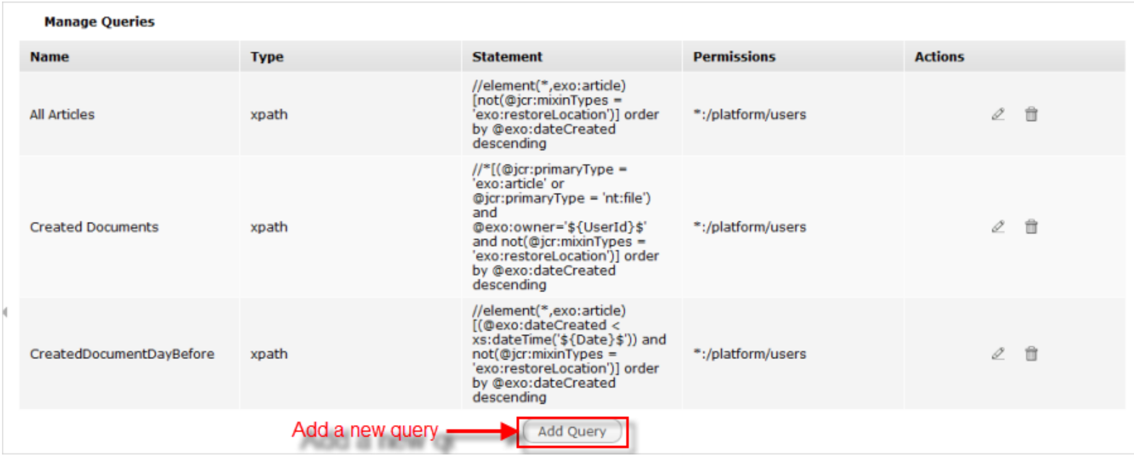
5.2.4. Advanced Configuration

This section is divided into 4 sub-topics:

- *Manage queries*
- *Manage Scripts*
- *Create an action type*
- *Manage locks*

5.2.4.1. Manage queries

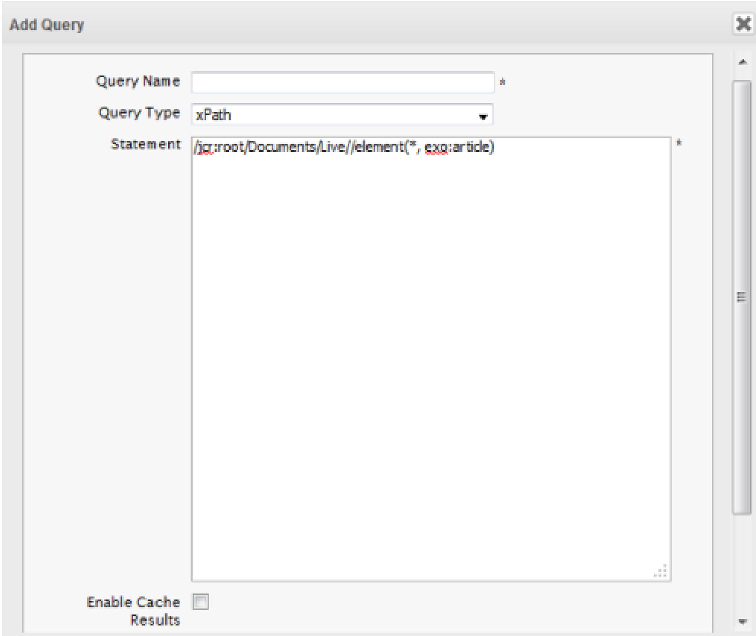
The function enables you to add, edit and delete queries by going to **Advanced Configuration --> Manage Queries.**



Name	Type	Statement	Permissions	Actions
All Articles	xpath	//element(*,exo:article)[not(@jcr:mixinTypes = 'exo:restoreLocation')] order by @exo:dateCreated descending	*:/platform/users	
Created Documents	xpath	//*[(@jcr:primaryType = 'exo:article' or @jcr:primaryType = 'nt:file') and @exo:owner='${UserId}$' and not(@jcr:mixinTypes = 'exo:restoreLocation')] order by @exo:dateCreated descending	*:/platform/users	
CreatedDocumentDayBefore	xpath	//element(*,exo:article)[(@exo:dateCreated < xs:dateTime('${Date}$')) and not(@jcr:mixinTypes = 'exo:restoreLocation')] order by @exo:dateCreated descending	*:/platform/users	

Add a new query

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



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

3. Select the query type from the drop-down **Query Type** menu.

   - **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 the query that must be unique.

5. Check or uncheck the **Enable Cache Results** option. If you tick this checkbox, for the first time you use this query to search, the result will be cached. For the second time you search using this query, it will show the cached results. After 45 minutes, the cache will be removed.

   For example, you have the query `Test` with statement `//element (*, nt:file)`. In the File Explorer, you have a `nt:file` document named `File1`. When you execute the query `Test`, only document `File1` will be shown. After that, create a `nt:file` document named `File2` and execute query `Test`, only document `File2` document will be listed. After 45 minutes, the cache will be removed. When you execute the query `Test`, the documents `File1` and `File2` will be listed.

6. Select permissions for a group that can use this query by clicking .

7. Click **Save** to finish adding a new query.

Edit a query

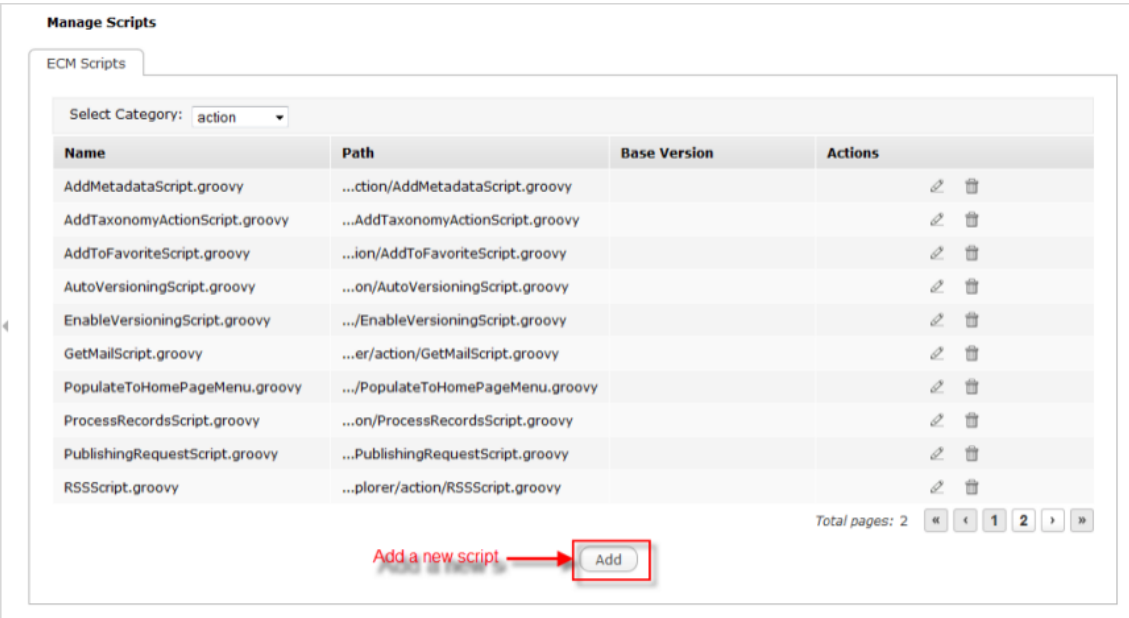
1. Click corresponding to the query you want to edit. The **Edit Query** form will appear.
2. Edit the properties of the selected query.
3. Click **Save** to accept all changes.

Delete a query

1. Click corresponding to the query you want to delete.
2. Click **OK** in the confirmation message to accept your deletion, or **Cancel** to discard this action.

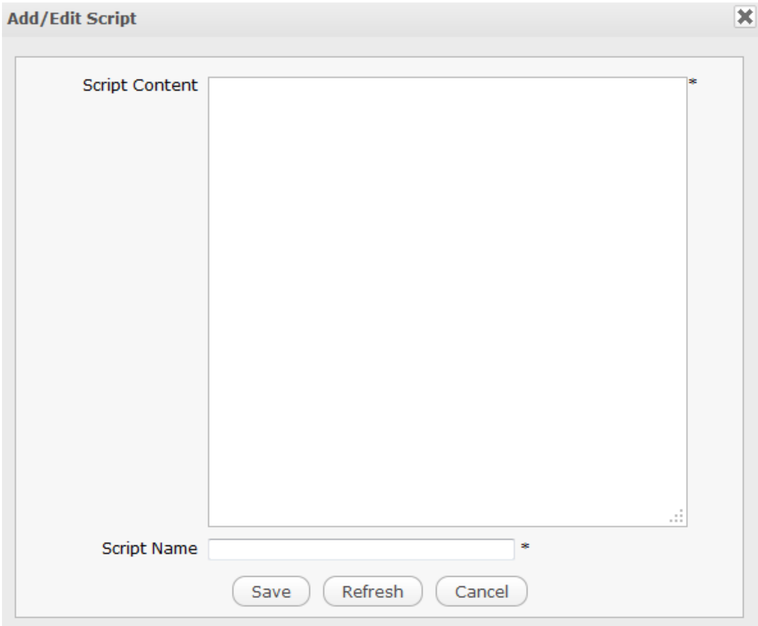
5.2.4.2. Manage Scripts

The function enables you to manage all script codes in the **eXo Platform** and **Browser Content** system by going to **Advanced Configuration --> Manage Scripts.**



Add a new script in ECM

1. Click the **Add** button in the **Manage Script** page to open the **Add/Edit Script** form.



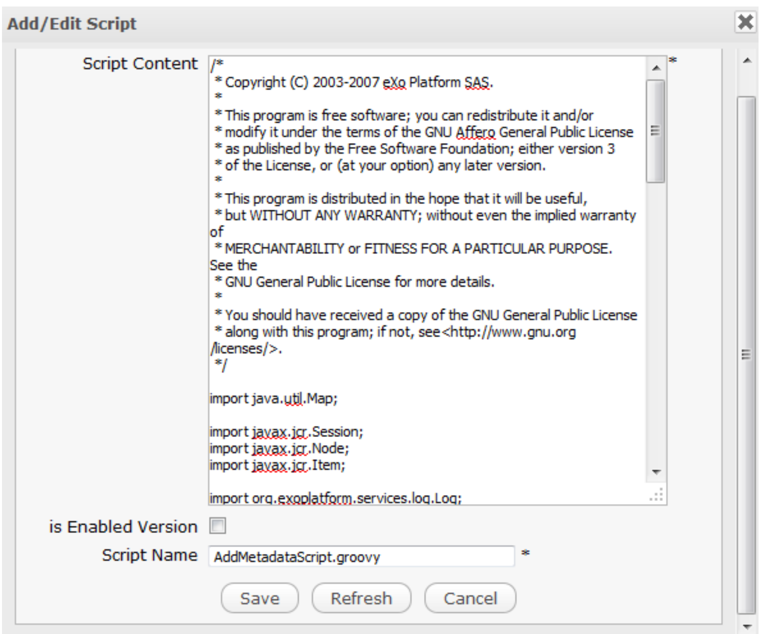
2. Enter a value for the **Script Content** field.

3. Enter a script name for the **Script Name** field that must be unique and not contain special characters, such as !,@,#,$,%,&,*,(,).

4. Click **Save** to accept adding the new script.

Edit an ECM script

1. Click  corresponding to the script that you want to edit in the **ECM Scripts** tab. The **Add/Edit script** form will appear.



2. Edit the properties in this form.

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

Delete an ECM script

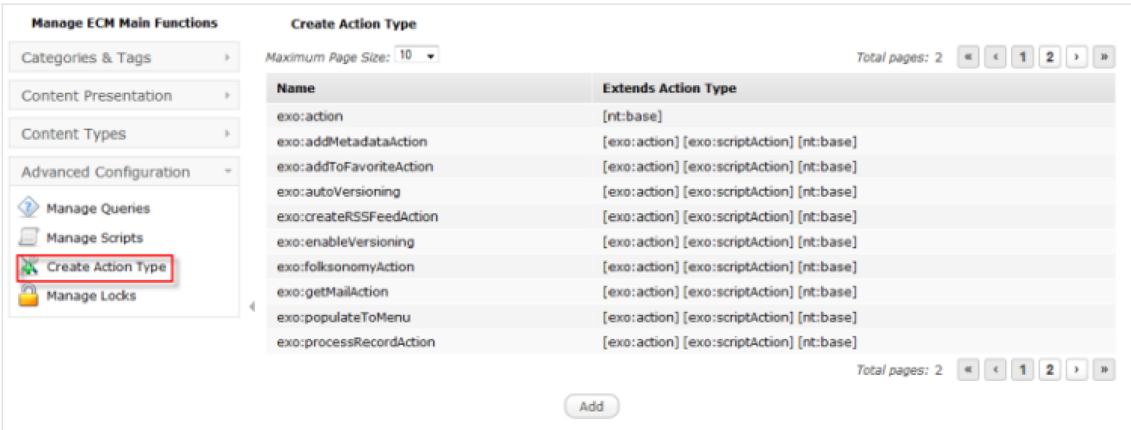
1. Click on the script that you want to delete in the **ECM Scripts** tab.

2. Click **OK** in the confirmation message to accept your deletion, or **Cancel** to discard this action.

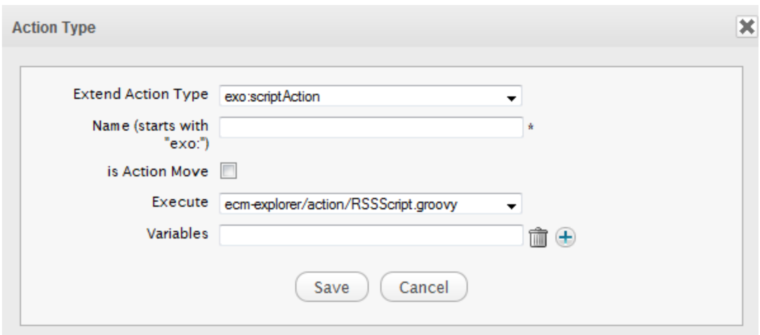
5.2.4.3. Create an action type

This function allows you to manage all action nodes in the **eXo Platform**.

1. Select **Advanced Configuration --> Create Action Type.**



2. Click the **Add** button to open the **Action Type** form.



3. Select the action type.

4. Input a name for the action.

5. Check/uncheck the **is Action Move** option. The action will have *exo:move* property or not.

6. Select an "execute" for the **Execute** field.

7. Click next to **Variables** field to add more values for the action.

   - Click to delete a value.

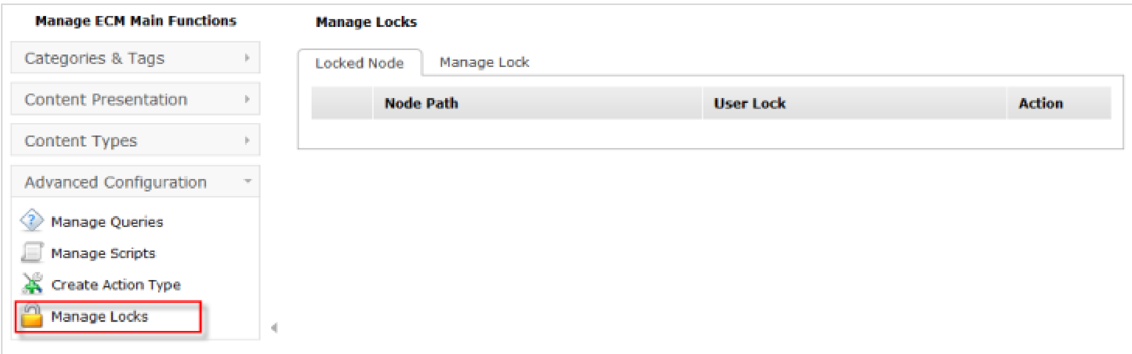
8. Click **Save** to accept adding a new action type.

5.2.4.4. Manage locks

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

Unlock a node

1. Select **Advanced Configuration --> Manage Locks** on the **Manage ECM Main Functions** pane on the left. The locked nodes will be listed in the right pane.

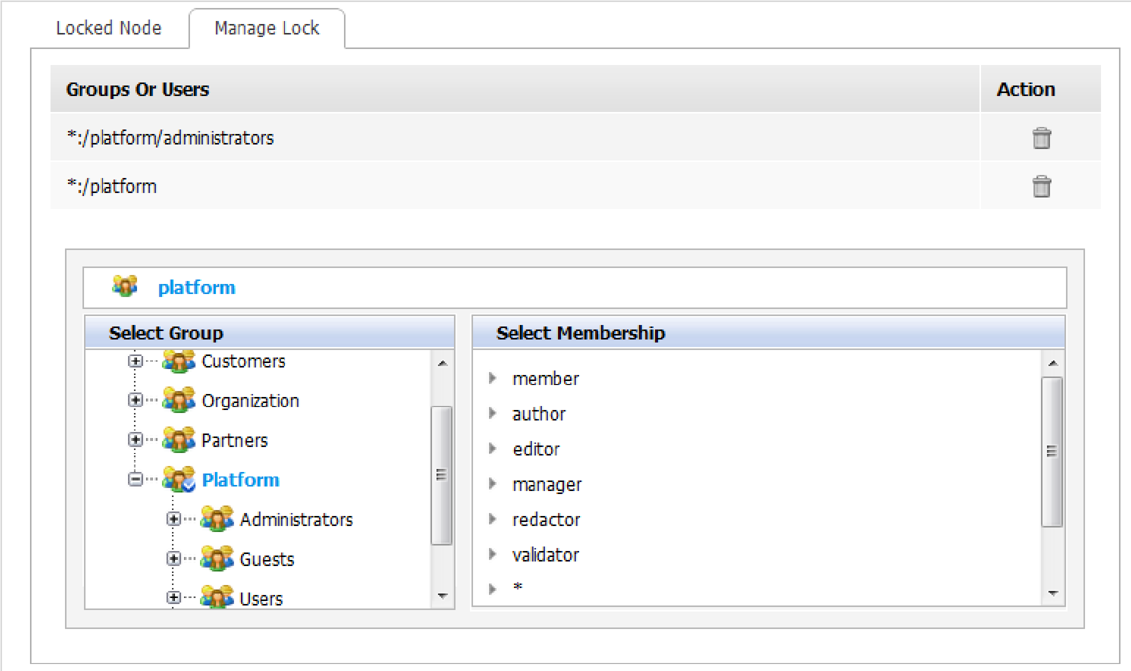


2. Click corresponding to nodes which need to be unlocked in the **Locked Node** tab in the right pane. The unlocked nodes will disappear from the locked nodes list.

   Administrators can manage and add the unlock permission for another group and users in the **Manage Lock** tab.

3. Select the group on the **Select Group** pane and the corresponding membership on the **Select Membership** pane. The selected group will be listed in the **Groups Or Users** column.

   - Click corresponding to the group which you want to remove from the "Unlock" permission list, except 2 groups: `*:/platform/administrator` and `root`.


Locked Node
Manage Lock
Groups Or Users
Action
*:/platform/administrators
*:/platform
platform
Select Group
Customers
Organization
Partners
Platform
Administrators
Guests
Users
Select Membership
member
author
editor
manager
redactor
validator
*

Next Steps

This user guide has provided a thorough explanation of features and terminologies within eXo Platform. Now that you know how to create, manage and publish web content and administer a website based on eXo Platform, 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		