

# GateIn User Guide



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

edited by Scott Mumford (Red Hat), Thomas Heute (Red Hat), and Luc Texier (Red Hat)

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# Preface

## 1.1. Overview

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

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

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

## 1.2. Purpose of the guide

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

## 1.3. References and Related Sources

### Information

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

### Support

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





# Get started

## 2.1. Glossary

### 2.1.1. Portal

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

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

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

### 2.1.2. Portlet

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

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

### 2.1.3. Toolbar

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



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

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

### 2.1.4. Navigation

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

There are three navigation types.

#### Site

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

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

### Group

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

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

### Dashboard

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

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

### Site/Group Editor

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

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

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

## 2.1.5. Gadgets

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

For more information about the gadgets shipped by default with GateIn 3.2, please check out [Section 3.3.1, "Using the Dashboard Workspace"](#)

## 2.1.6. Modes

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

### Public

This mode is for guest users who are not registered with the Portal. It does not require a log in and restricts the visitor to the public pages in the portal. Visitors can register an account to gain access to the restricted pages. After being registered, they can use the Private mode but

must still contact the Portal administrator to get more rights or a group manager to become a member and gain access a group.

### Private

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

## 2.1.7. Permissions

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

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

### Access

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

### Edit

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

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

### Portal

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

### Page

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

### Portlet

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

Permission **types** and **levels** can be used to effectively control who can do what within the portal. For more information on setting permissions refer to [Section 4.7, "Manage Permissions"](#)

## 2.2. Accounts

### 2.2.1. Register New Accounts

Unregistered users visiting the portal are limited in the content they can see.

Users who need access to deeper content or who need to perform actions within the portal should register themselves and then contact the portal administrator to gain appropriate access permissions to their account.

Users can quickly and easily register a new account for themselves.

1. Click **Register** on the Navigation bar.



The **Register New Account** page appears:

**Register New Account**

User Name:  \*

Password:  \*

Confirm Password:  \*

First Name:  \*

Last Name:  \*

Email Address:  \*

The required information includes:

#### **User Name**

The name used to log in.

#### **Password**

The password must be between 6 and 30 characters and can contain spaces.

**Confirm Password**

Re-type the password above. The *Password* and *Confirm Password* fields must be the same.

**First Name**

The user's first name.

**Last Name**

The user's last name.

**Email Address**

The user's email address. This must be in the appropriate format. For example:  
*username@abc.com*.

2. Fill in the form.
3. Click the 'find' icon beside the user name field to check whether the chosen username is available.
4. Enter the text next to `verification:` into the text box that appears below it:

The image shows a verification step. At the top, the text '3df48' is displayed in a large, bold, black font. A diagonal line is drawn across the text from the bottom left to the top right. Below this, there is a rectangular text input box with a thin border. To the right of the input box, there is a small asterisk icon.

5. Click **Subscribe** to register a new account or **Reset** to refresh all entered values. You cannot add a new account if one of the following cases occurs:
  - The chosen **User name** already exists or is invalid.
  - The **Password** has less than 6 characters or more than 30 characters.
  - The **Password** and **Confirm Password** fields are not the same.
  - The **Email Address** format is not valid.
  - A required field (or fields) is empty.

After adding a new account, you should contact the administrator to set appropriate permissions on your account.



### Note

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

### 2.2.2. Sign In and Sign Out

In order to enter the portal in private mode, you should use the account previously registered.

To sign in to a portal, users must complete the **Sign in** form. This form contains the following elements:

#### User name

The registered user name.

#### Password

The registered password.

#### Remember My Login

Check this box to avoid log in every time

#### Forgot your User Name/Password?

To follow some steps to get the forgotten user name or password. Please refer [Portal:Account and Password Retrieval] for more details.

#### Sign in

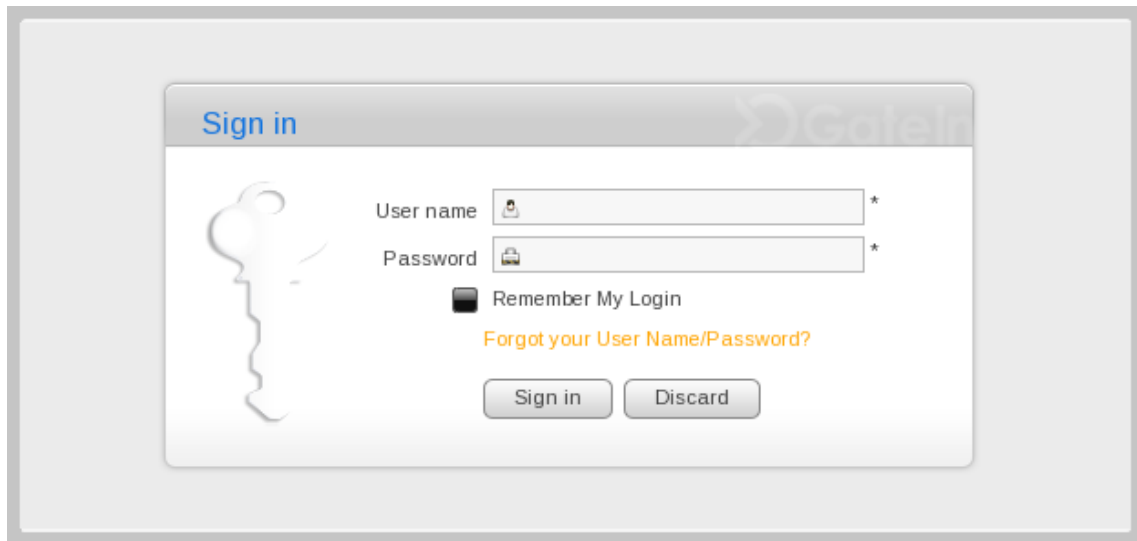
To sign into GateIn 3.2 with user name and password.

#### Discard

Close the Sign In form without logging in.

#### 2.2.2.1. Sign In

1. Go to your portal by entering the URL into the address bar of your browser (For example <http://localhost:8080/portal>).
2. Click the **Sign in** link at the top right of the page if you are current in the Classic portal. The **Sign in** form appears:



The image shows a 'Sign in' form for GateIn 3.2. The form is titled 'Sign in' in blue text. It features a stylized white key icon on the left. The form contains two input fields: 'User name' and 'Password', both with asterisks indicating they are required. Below the password field is a checkbox labeled 'Remember My Login'. A link 'Forgot your User Name/Password?' is displayed in orange text. At the bottom are two buttons: 'Sign in' and 'Discard'.

3. Input your registered **User name** and **Password** .
4. Select the **Remember My Login** check box when you sign in GateIn 3.2 at the first time if you want to automatically return to GateIn 3.2 without signing in again. You can see [Section 2.2.3, "Remember User Account"](#) for more details.
5. Click the **Sign in** button to submit the form or **Discard** to escape.

If the user name does not exist or the user name and/or password is invalid an alert message will appear. To attempt the log in again; click the **OK** button on the alert message to be returned to the Sign In form. Enter the user name and password again.

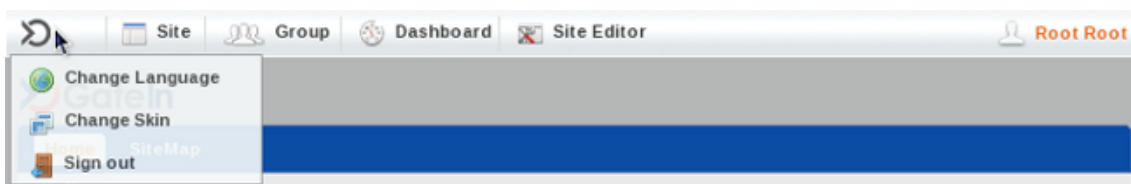
After signing in, you will be redirected to the homepage and welcomed with your full name in the top right corner of the page.



## 2.2.2.2. Sign Out

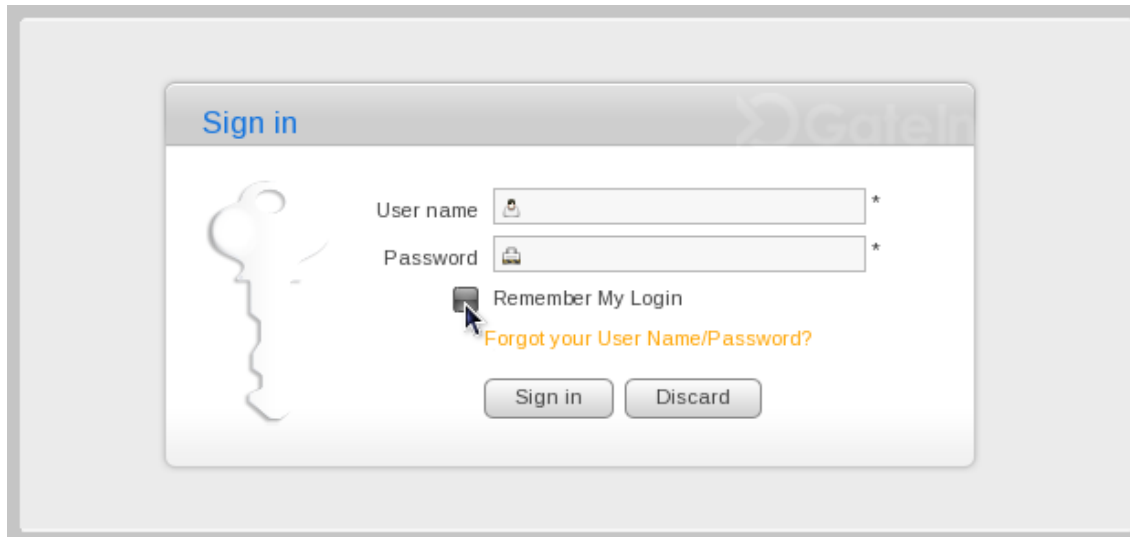
This feature ends the authenticated session and returns the user to the anonymous portal.

1. In the upper left corner of the screen, hover your cursor over the GateIn 3.2 icon. A drop down menu will appear.
2. Click **Sign out** :



### 2.2.3. Remember User Account

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

A screenshot of the GateIn 3.2 'Sign in' form. The form is titled 'Sign in' in blue text. It features a white silhouette of a person on the left. To the right of the silhouette are two input fields: 'User name' and 'Password', both with asterisks indicating they are required. Below these fields is a checkbox labeled 'Remember My Login'. To the right of the checkbox is a link that says 'Forgot your User Name/Password?'. At the bottom of the form are two buttons: 'Sign in' and 'Discard'.

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

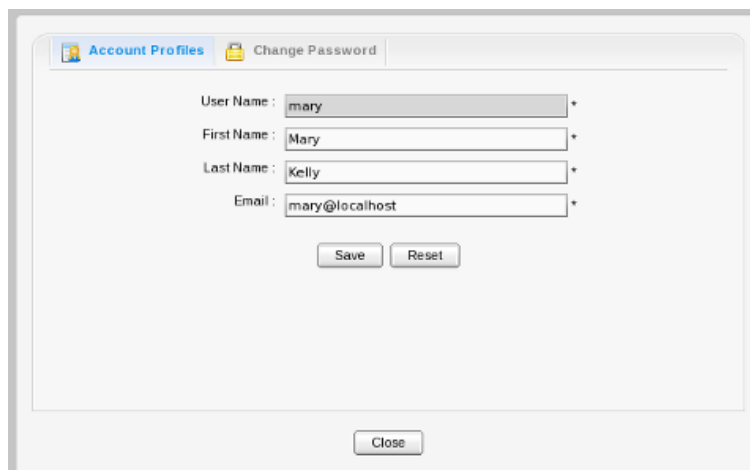
Do not sign out when you leave the portal and you will be automatically authenticated next time you visit it.

### 2.2.4. Change Account Settings

To change your account information, click on the account name in the top navigation bar:



The **Account Profiles** form will appear:

A screenshot of the 'Account Profiles' form. The form has two tabs: 'Account Profiles' (selected) and 'Change Password'. It contains four input fields: 'User Name' (with the value 'mary'), 'First Name' (with the value 'Mary'), 'Last Name' (with the value 'Kelly'), and 'Email' (with the value 'mary@localhost'). Each field has an asterisk indicating it is required. Below the fields are two buttons: 'Save' and 'Reset'. At the bottom of the form is a 'Close' button.

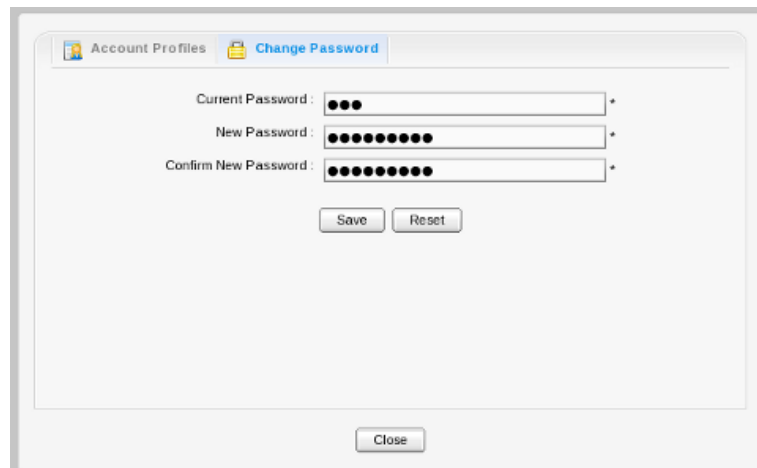


To change your Account Profile information:

1. Select the **Account Profiles** tab.
2. Your **User Name** cannot be changed. You can change your: **First Name** , **Last Name** and **Email**.
3. Once the desired changes have been made, click the **Save** button to submit them.

If you want to change your **Password** :

1. Select the **Change Password** tab, it will display the following form:

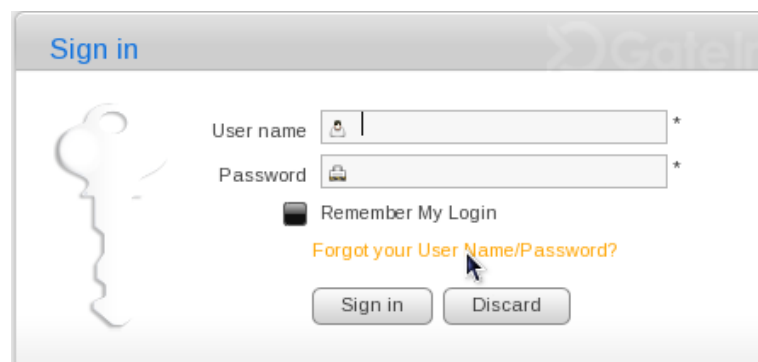


2. Input your current password to identify that you are the owner of this account.
3. Input your new password, it must have at least 6 characters
4. Re-enter your password in the **Confirm New Password** field.
5. Click the **Save** button to accept changes.

## 2.2.5. Account and Password Retrieval

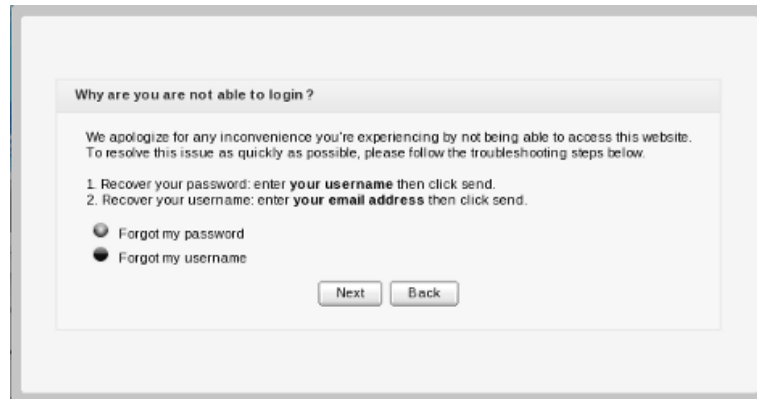
You can recover your username or password should you forget them by following these steps:

1. Click the link '**Forgot your User Name/Password?**'



2. This form offers two options:

- **Forgot my password.**
- **Forgot my username.**



Why are you are not able to login ?

We apologize for any inconvenience you're experiencing by not being able to access this website. To resolve this issue as quickly as possible, please follow the troubleshooting steps below.

1. Recover your password: enter **your username** then click send.
2. Recover your username: enter **your email address** then click send.

☐ Forgot my password

☒ Forgot my username

Next Back

Select the appropriate option and click **Next**.

3. You will be prompted to provide identification information depending on which option you selected:

- If you selected the **Forgot my password** option you will be prompted for your username:



Forgot User Name/Password

User name :

Send Back

- If you selected **Forgot my username** you will be prompted for your email address.



Forgot User Name/Password

Email :

Send Back

After you submit the form an email will be send to your email address with the requested information, either your username or password.

If you forgot your password you will be sent a new (temporary) password. Your original password will not be valid after this email is sent. You will be directed to a page to update your password the next time you sign in.

## 2.3. Manage Language

### 2.3.1. Change Interface Language

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

The priority of the interface language setting follows this hierarchy:

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

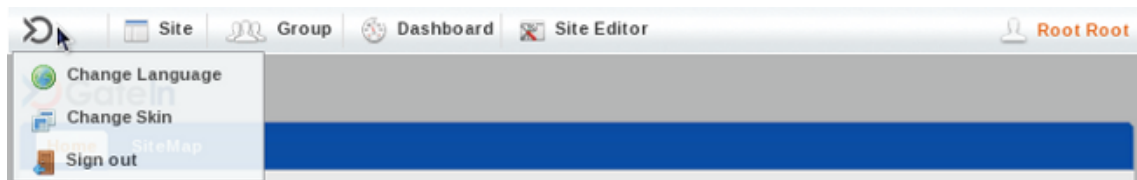
Note that users should pay attention to this order in order to change the language type appropriately.

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

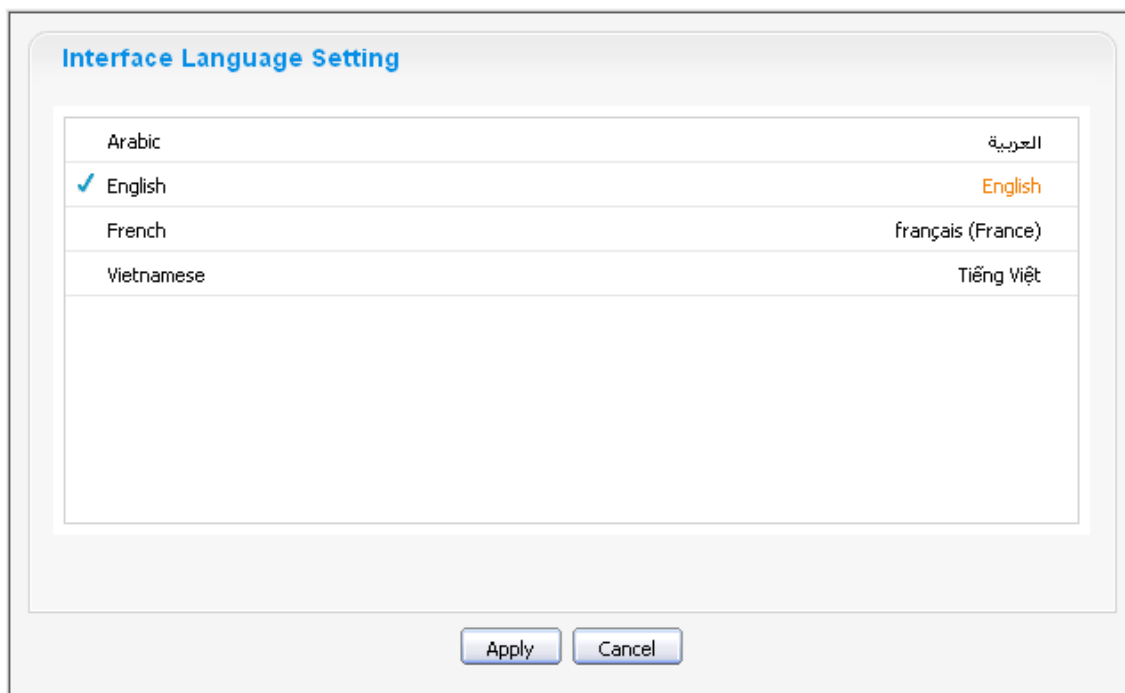
#### 2.3.1.1. Language for the user

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

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



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



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

### 2.3.1.2. Set language for a user

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

#### Public Mode

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

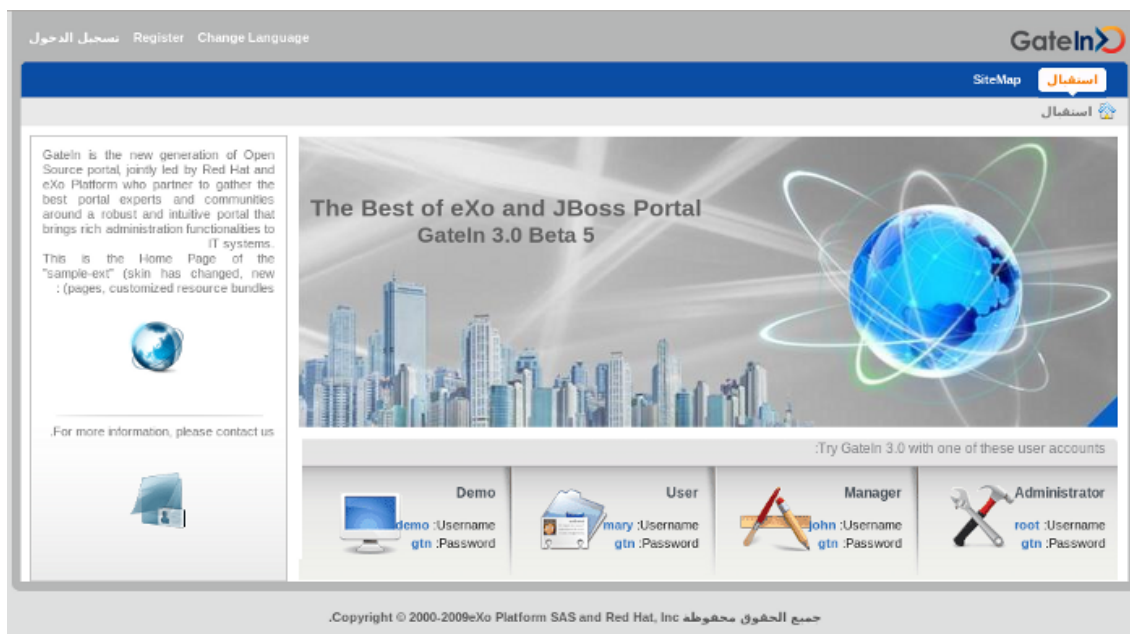
If you have set the language of your browser to one that GateIn 3.2 does not support, the displaying language will be the language set at the Portal level (see above).

#### Private Mode

The interface language in **Private Mode** is set when registering each user. See step four of the process to register a new account [Section 2.2.1, "Register New Accounts"](#).

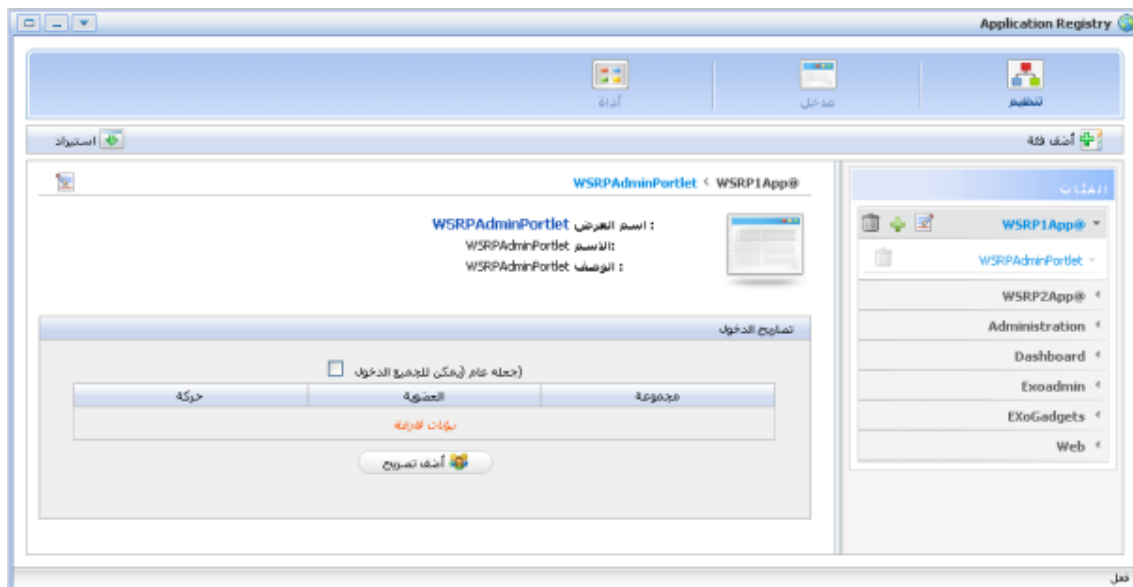
### 2.3.2. Right To Left Support

GateIn 3.2 supports Right to Left (RTL) languages.

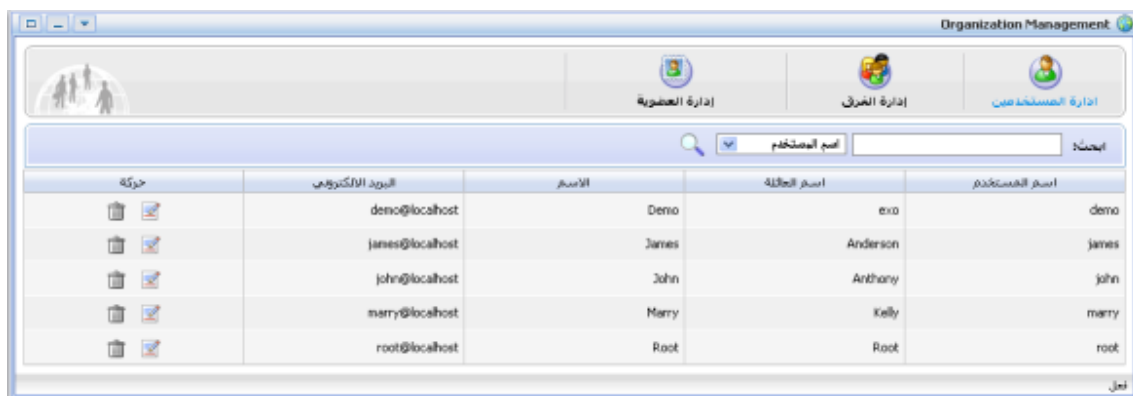


### The Account Portlet.

### The Application Registry Portlet.



### The Organization Portlet:



### 2.3.3. Multi-Language Navigation Nodes

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

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

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

#### 2.3.3.1. Key Format

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

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

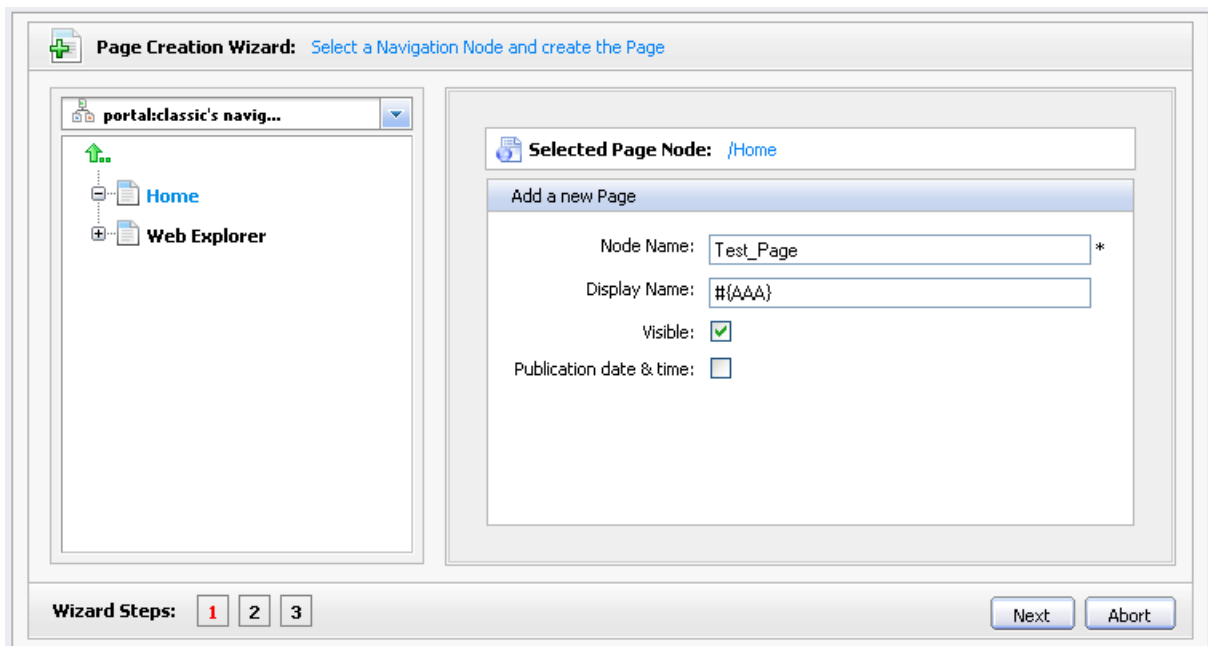
### 2.3.3.2. Creating Keys

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

1. [Section 2.3.3.3, “Creating Keys using \*\*Create Page Wizard\*\*”](#)
2. [Section 2.3.3.4, “Creating/Editing Keys using \*\*Navigation Management\*\*”](#)

### 2.3.3.3. Creating Keys using Create Page Wizard

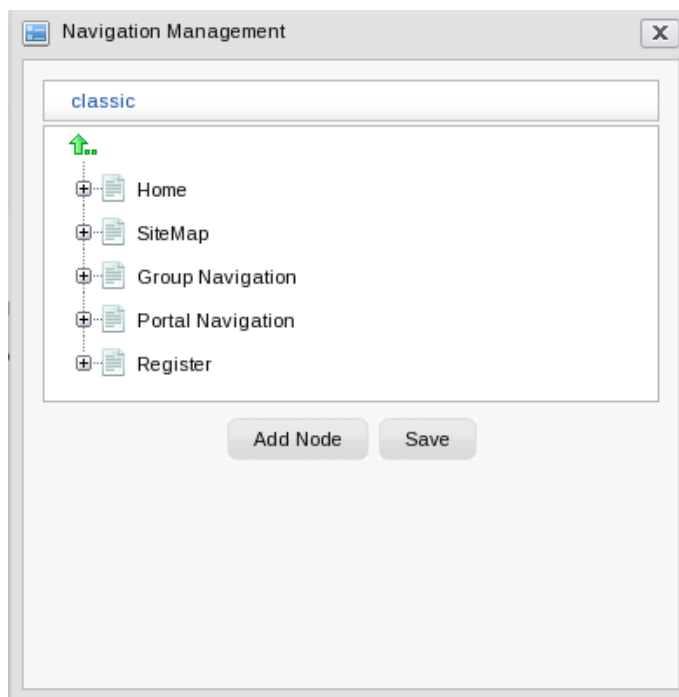
1. Open the **Site Editor** menu and pick **Add New Page**.
2. Enter a name for this new page
3. Enter a resource key in the **Display Name** field.



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

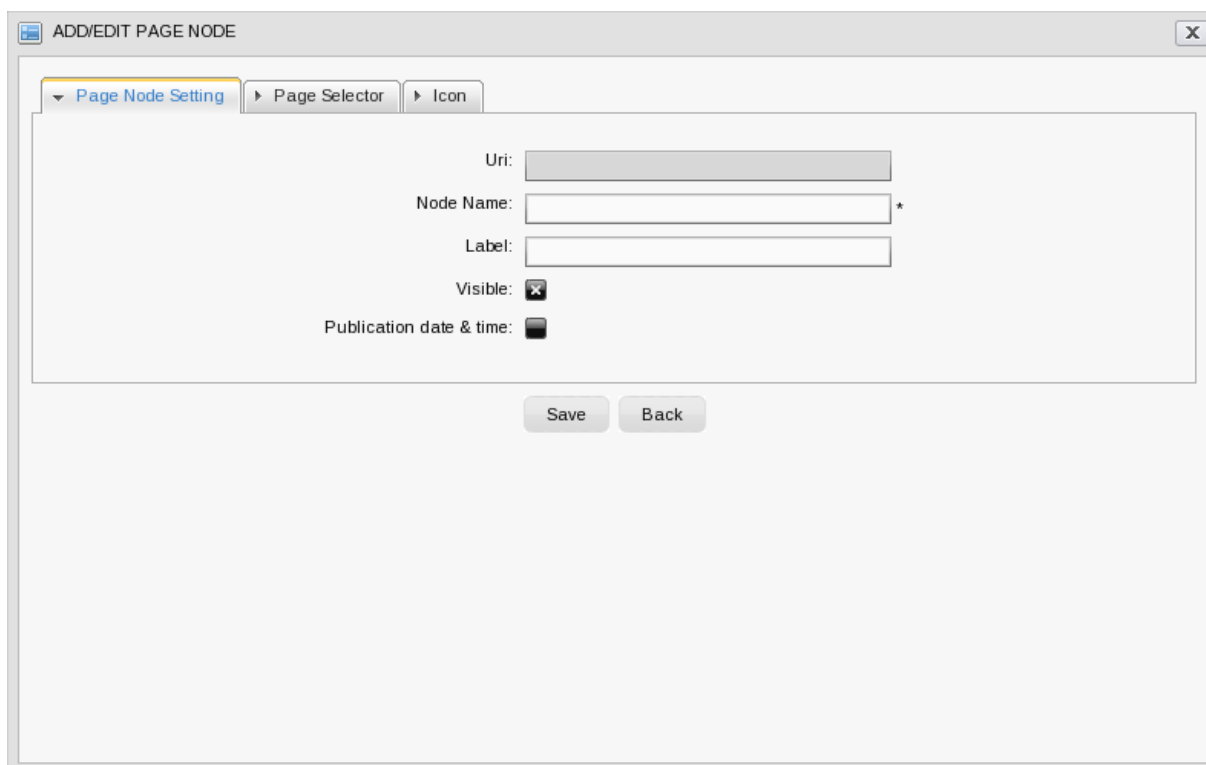
### 2.3.3.4. Creating/Editing Keys using Navigation Management

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



2. Click on **Add Node**

3. The Create/Edit node dialog appears. Enter a resource key in the **Label** field







### Reusing Keys

You can reuse the same resource key in several nodes.

#### 2.3.3.5. Providing translation

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

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

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# Portlets

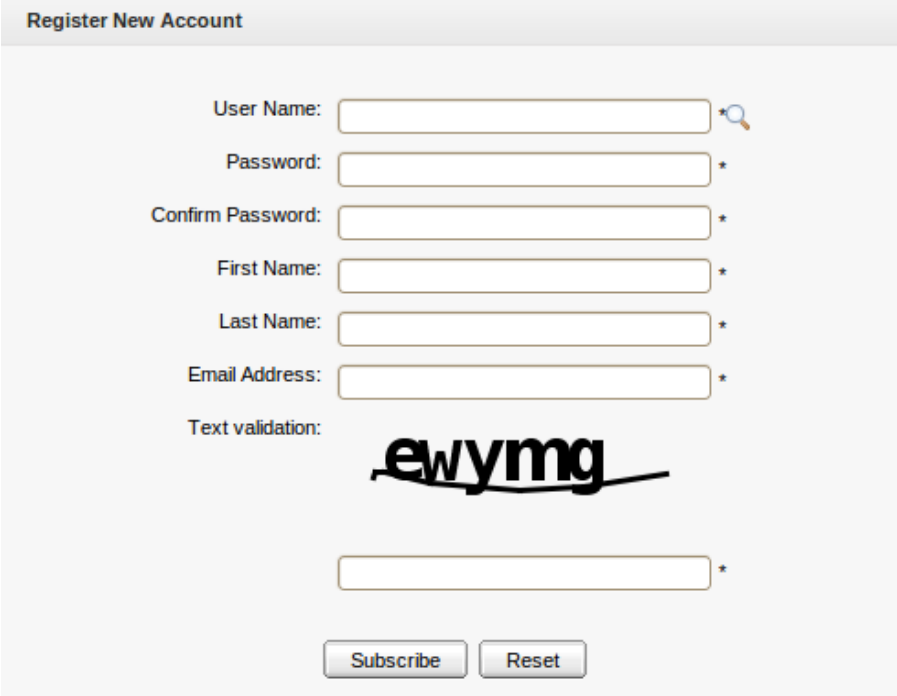
## 3.1. Functional Portlets

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

GateIn 3.2 provides the following portlets by default:

### 3.1.1. Register portlet

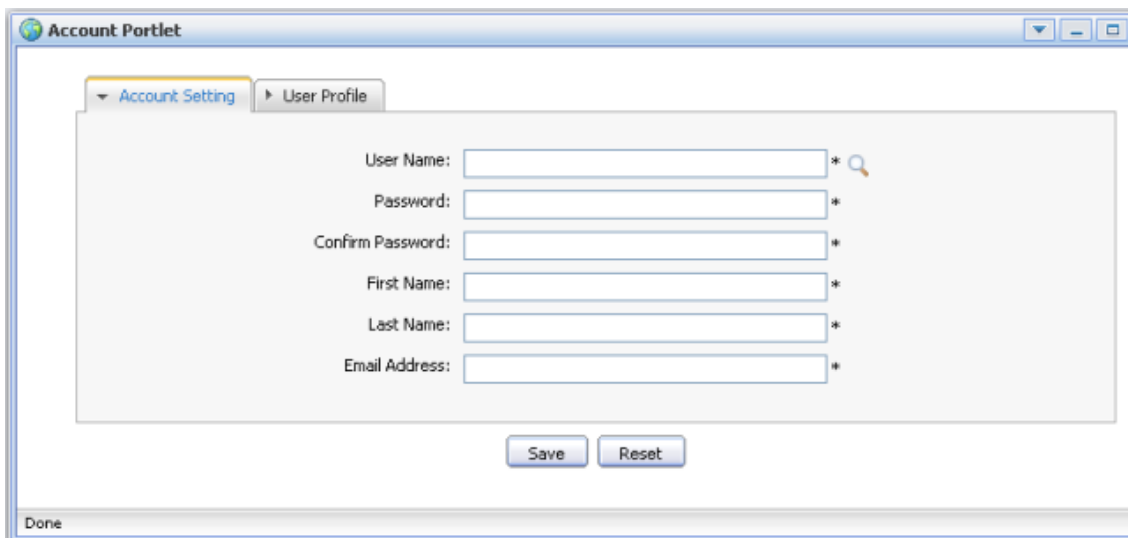
This portlet is used to register a new account, including User Name, Password, Confirm Password, First Name, Last Name, Email Address, and Text validation.



The screenshot shows a web form titled "Register New Account". It contains several input fields with labels to their left: "User Name:", "Password:", "Confirm Password:", "First Name:", "Last Name:", "Email Address:", and "Text validation:". Each of these fields has a small asterisk (\*) to its right, indicating they are required. The "Text validation:" field contains a CAPTCHA image showing the text "ewymg" in a stylized font. Below the input fields are two buttons: "Subscribe" and "Reset".

### 3.1.2. Account portlet

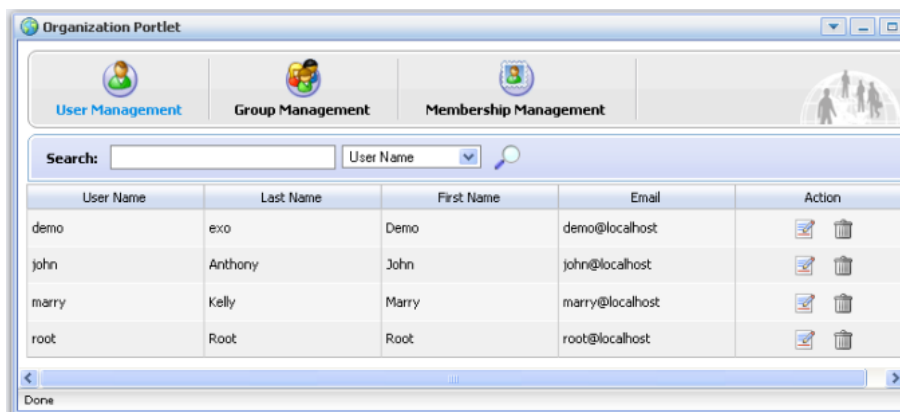
The Account portlet allows users to register a new account and choose a preferred language for displaying the Portal interface.











The screenshot shows the 'Account Portlet' window with a tabbed interface. The 'User Profile' tab is active, displaying a form with the following fields: 'User Name', 'Password', 'Confirm Password', 'First Name', 'Last Name', and 'Email Address'. Each field is followed by an asterisk (\*) indicating it is required. There is a magnifying glass icon next to the 'User Name' field. At the bottom of the form are 'Save' and 'Reset' buttons. The window title bar says 'Account Portlet' and the status bar at the bottom says 'Done'.

### 3.1.3. Organization portlet

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



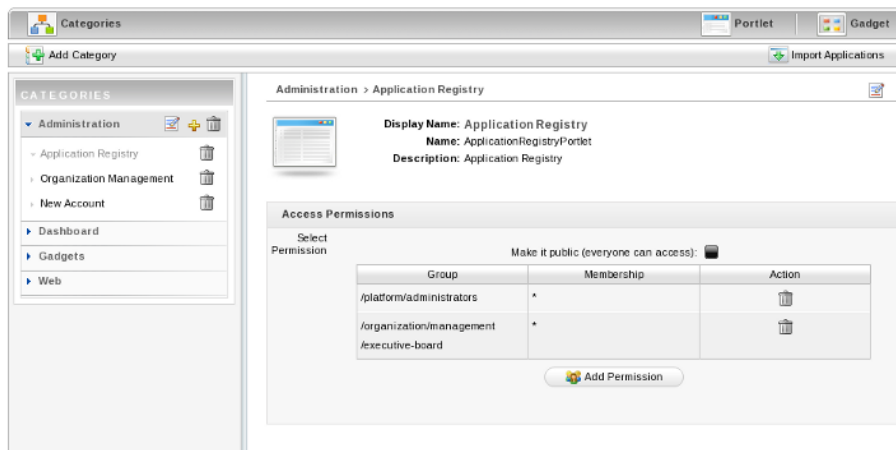
The screenshot shows the 'Organization Portlet' window. It has three tabs: 'User Management' (selected), 'Group Management', and 'Membership Management'. Below the tabs is a search bar with the text 'Search:' and a dropdown menu set to 'User Name'. Below the search bar is a table with the following data:

User Name	Last Name	First Name	Email	Action
demo	exo	Demo	demo@localhost	 
john	Anthony	John	john@localhost	 
marry	Kelly	Marry	marry@localhost	 
root	Root	Root	root@localhost	 

At the bottom of the table is a pagination bar with '<' and '>' arrows and the number '100'. The window title bar says 'Organization Portlet' and the status bar at the bottom says 'Done'.

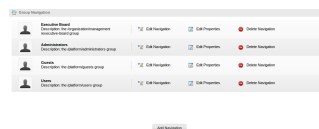
### 3.1.4. Application Registry portlet

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



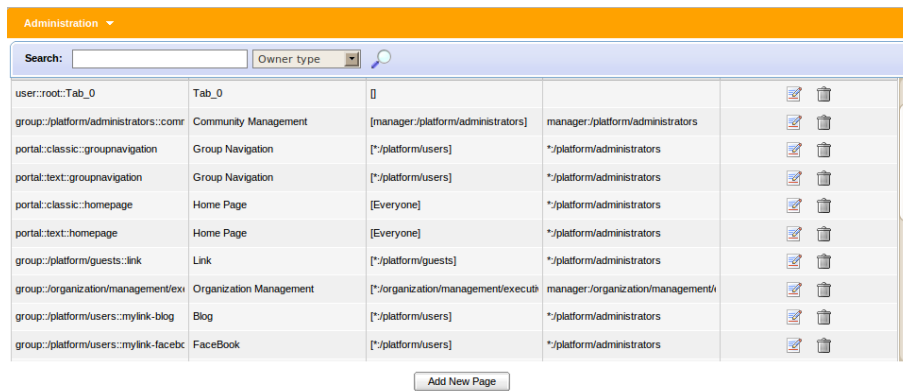
### 3.1.5. Group Navigation portlet

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



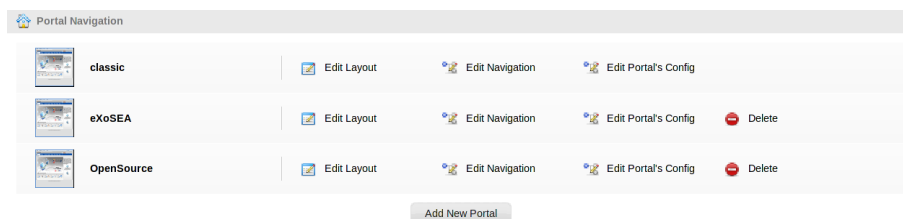
### 3.1.6. Page Management portlet

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



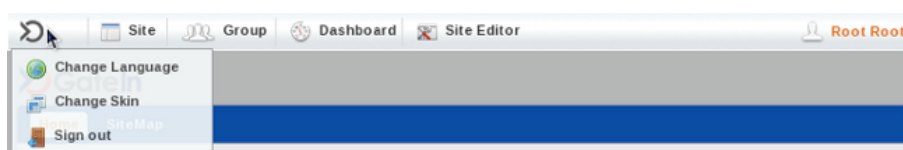
### 3.1.7. Portal Navigation portlet

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



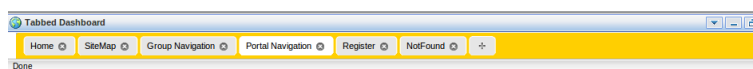
### 3.1.8. Star Toolbar portlet

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



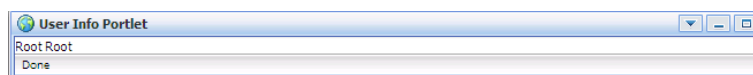
### 3.1.9. Tabbed Dashboard portlet

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



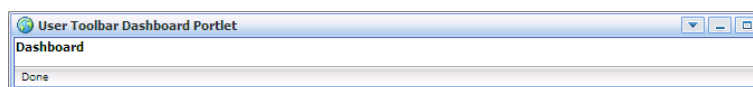
### 3.1.10. User Info portlet

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



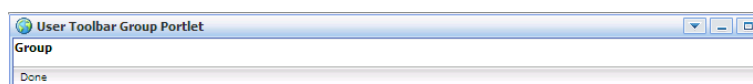
### 3.1.11. User Toolbar Dashboard portlet

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



### 3.1.12. User Toolbar Group portlet

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



## 3.2. Interface portlets

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

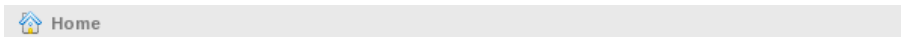
### 3.2.1. Banner portlet

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



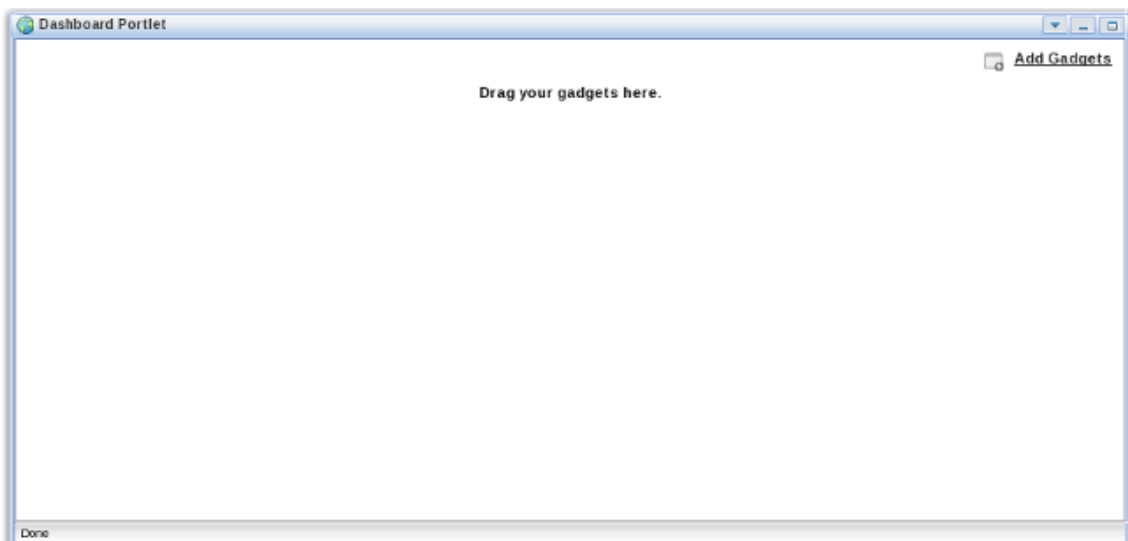
### 3.2.2. Breadcrumbs portlet

The portlet displays the navigation path of the selected page.



### 3.2.3. Dashboard portlet

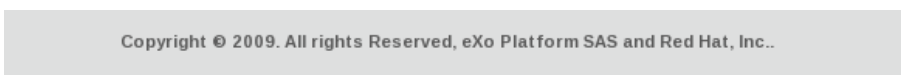
This portlet is used for hosting mini-applications known as gadgets. The dashboard uses a variety of graphical effects for displaying, opening, and using gadgets.



Refer to [Section 3.3, “Dashboard Portlet”](#) or [Chapter 5, Category, Portlets and Gadgets Administration](#) for more information.

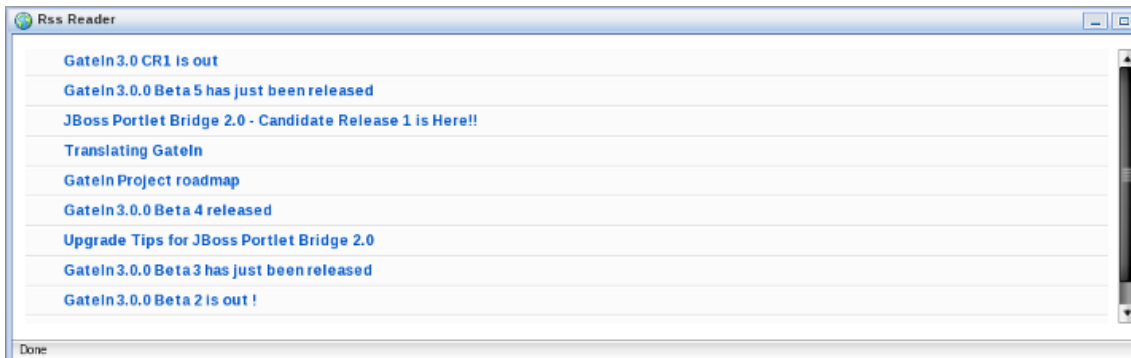
### 3.2.4. Footer portlet

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



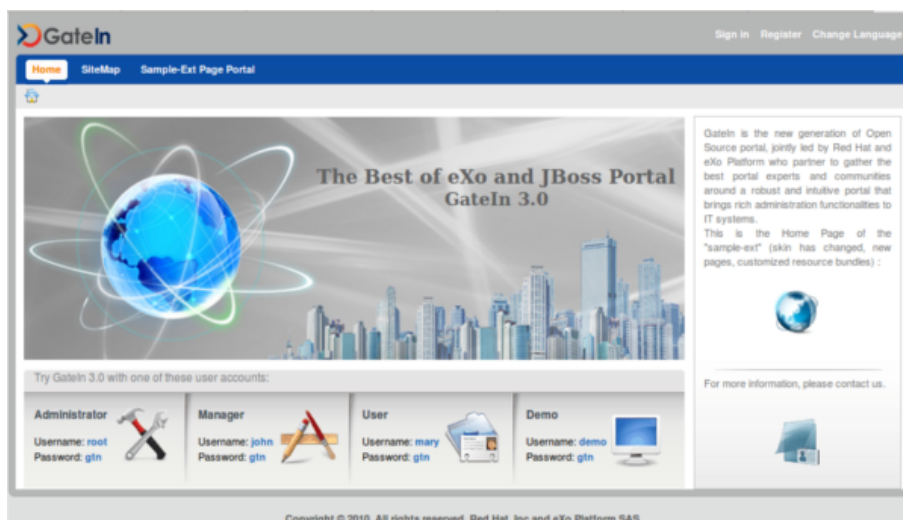
### 3.2.5. Gadget Wrapper portlet

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



### 3.2.6. Homepage portlet

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



### 3.2.7. IFrame portlet

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





### 3.2.8. Navigation portlet

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



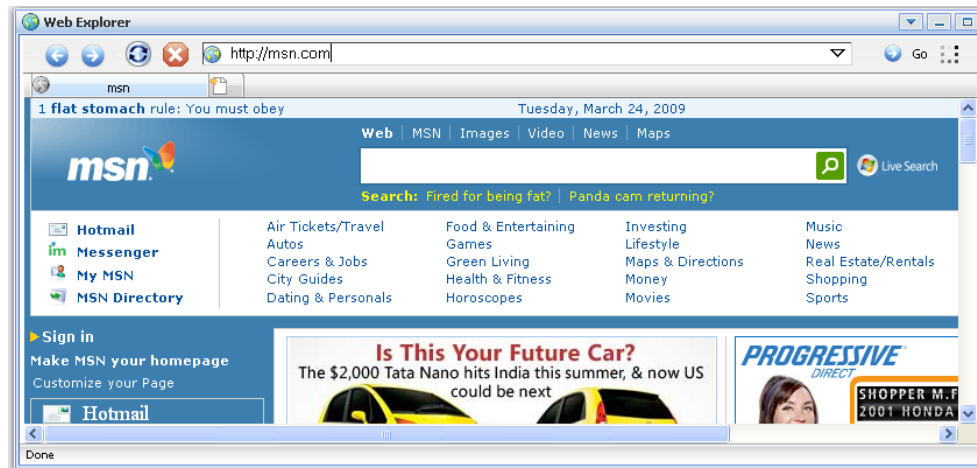
### 3.2.9. Sitemap portlet

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



### 3.2.10. Web Browser portlet

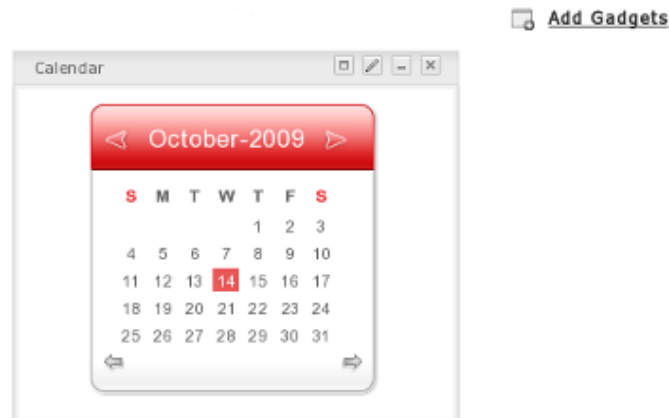
The portlet provides a web-browser-like application for users. It enables you to connect to other sites over Internet.



### 3.3. Dashboard Portlet

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

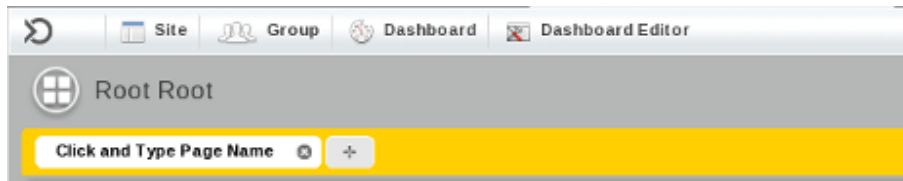
Gadgets within the Dashboard portlet can be moved and rearranged. New gadgets can be created and unnecessary ones deleted. More than one instance of the same gadget can be opened at the same time and each instance of the same gadget can have different settings. The gadgets instances are completely independent.



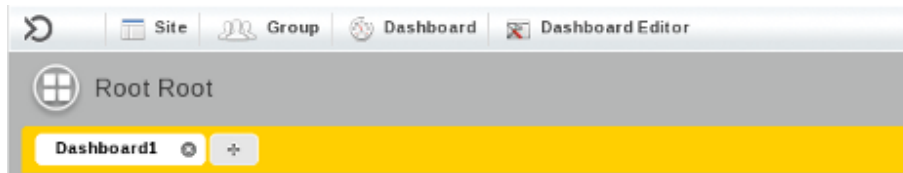
#### 3.3.1. Using the Dashboard Workspace

1. Click **Dashboard** in the toolbar to access the Dashboard portlet.
2. Click **Add Gadgets** to open the Dashboard Workspace.

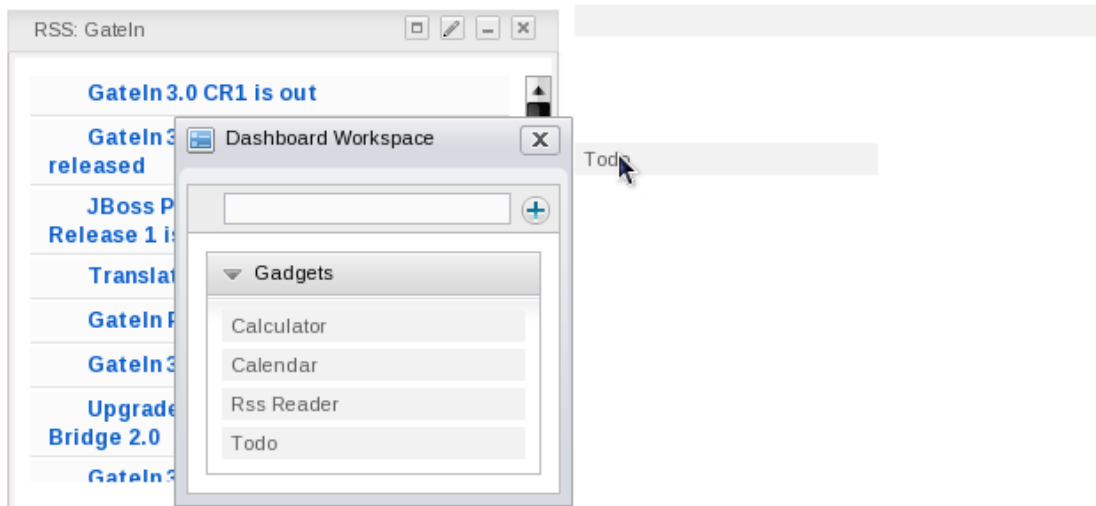
The active Dashboard can be individually named by clicking the default name ("*Click and Type Page Name*")...



...and entering a new name:



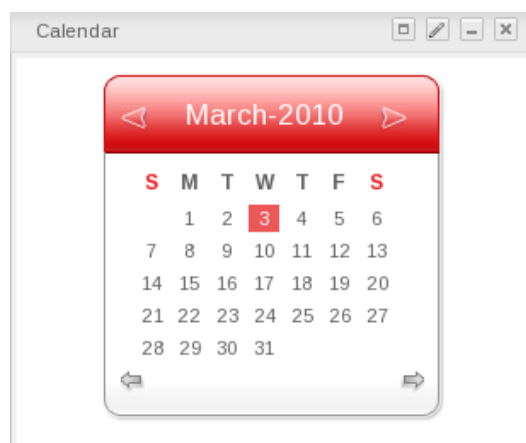
The Dashboard Workspace lists all available gadgets. Four gadgets are provided by default with GateIn 3.2, however you can add many more.



## Default Gadgets:

### Calendar

The calendar gadget allows users to switch easily between daily, monthly and yearly view and, is customizable to match your portal's theme.



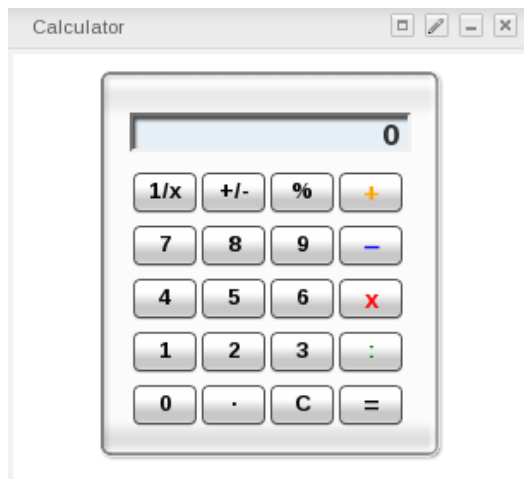
### ToDo

This application helps you organize your day and work group. It is designed to keep track of your tasks in a convenient and transparent way. Tasks can be highlighted with different colors.



### Calculator

This mini-application lets you perform most basic arithmetic operations and can be themed to match the rest of your portal.



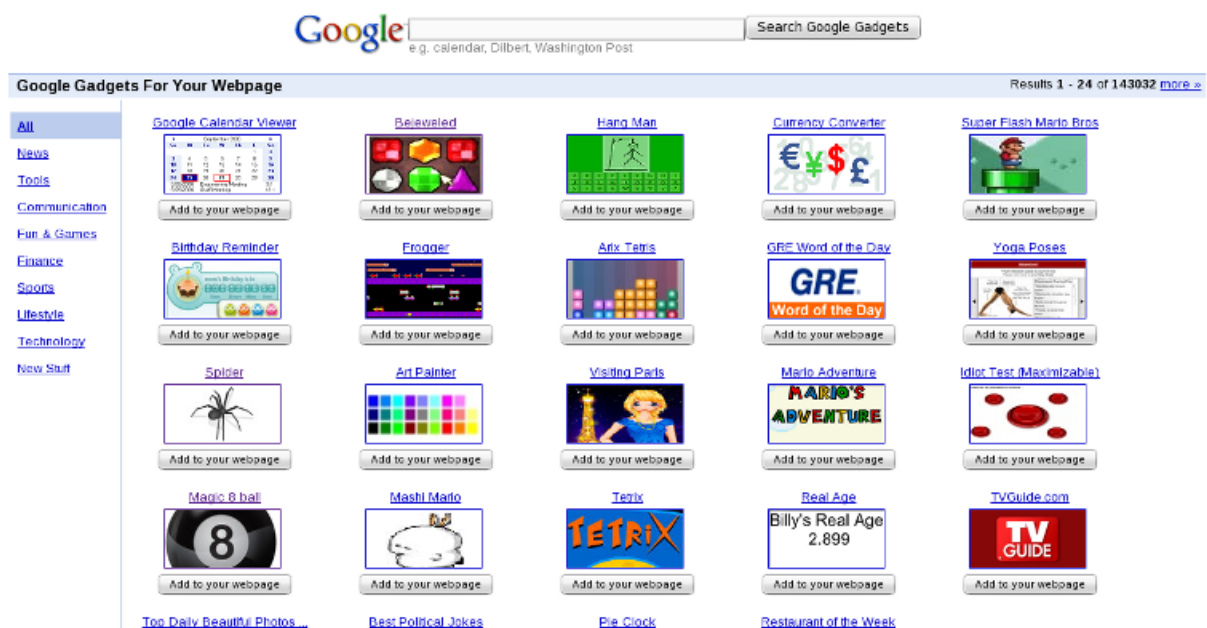
### RSS Reader

An RSS reader, or aggregator, collates content from various, user-specified feed sources and displays them in one location. This content can include, but isn't limited to, news headlines, blog posts or email. The RSS Reader gadget displays this content in a single window on your Portal page.



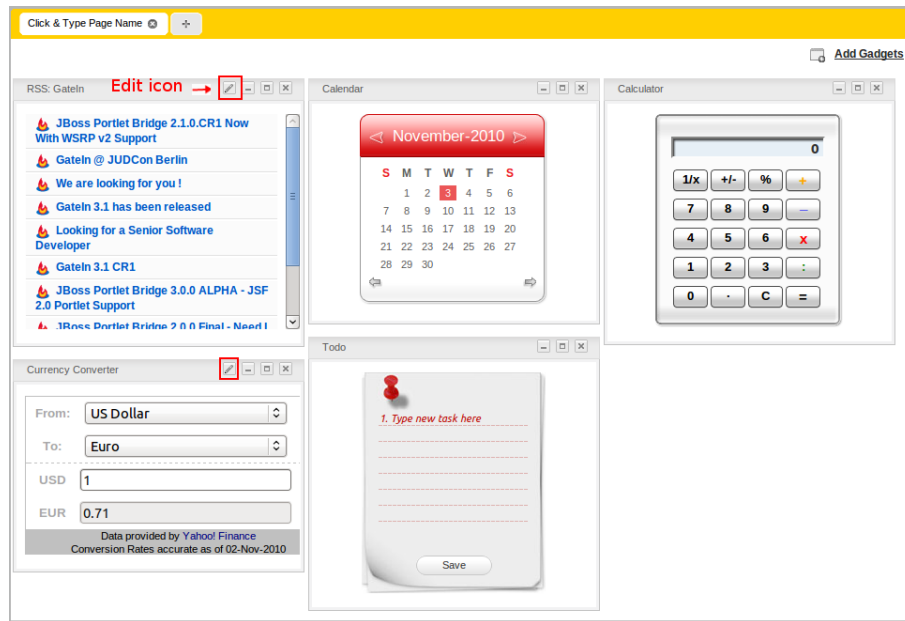
### More Gadgets

Many more gadgets can be found at [Google Gadgets](http://www.google.com/ig/directory?synd=open) [http://www.google.com/ig/directory?synd=open]. GateIn 3.2 is compatible with most of the gadgets available there.



### 3.3.2. Change gadget preferences

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



To change preferences of a gadget, for example RSS gadget, do as follows:

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

RSS: GateIn

FEED URL:

`http://feeds.feedburner.com/ga`

# of Items (1-100):

3

Save Cancel

JBoss Portlet Bridge 2.1.0.CR1 Now With WSRP v2 Support

GateIn @ JUDCon Berlin

We are looking for you !

↑  
Number of items

2. Enter your preferred RSS into the **FEED URL** field and one numeric character (from 1 to 100) in the **Items** field. The numeric character you entered is the number of items displayed in the RSS gadget.
3. Click **Save** to accept your changes, or **Close** to close the edit form without any changes.

### 3.3.3. Add Gadgets

To add more gadgets from external sources:

1. Obtain the URL (.xml or .rss) of the gadget you wish to add from the gadget source.

The gadgets available at [Google Gadget](http://www.google.com/ig/directory?synd=open) [http://www.google.com/ig/directory?synd=open] provide a link to **View source**. Clicking this link will open a page showing the gadget's XML

source. Use the URL of this page in the Dashboard Workspace. The URL should end with .xml

For example:

 <http://widgets.clearspring.com/cscallback/gallery/4920a0df9f15b805/googlegallery.xml> 

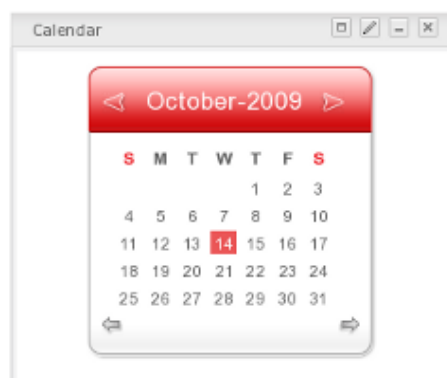


### URL Types

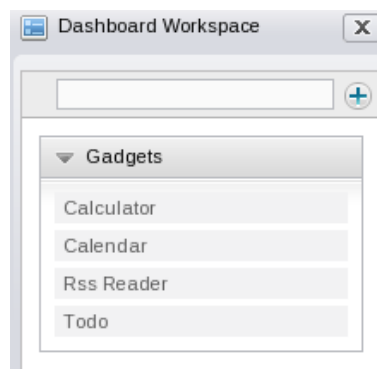
Remote gadgets can be only created using an .xml link or RSS URL. However, if you use a link that generates an RSS feed (for example: <http://feeds.feedburner.com/gatein> [http://feeds.feedburner.com/gatein]), a new RSS reader gadget will be created automatically even if the URL does not end with .rss.

2. Return to your portal and click **Dashboard** in the toolbar.
3. Click **Add Gadgets** in the Dashboard to open the Dashboard Workspace.

 **Add Gadgets**

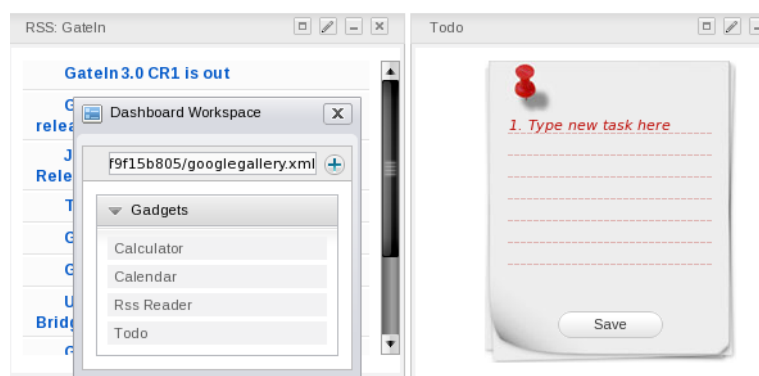


4. The Dashboard Workspace dialog appears:

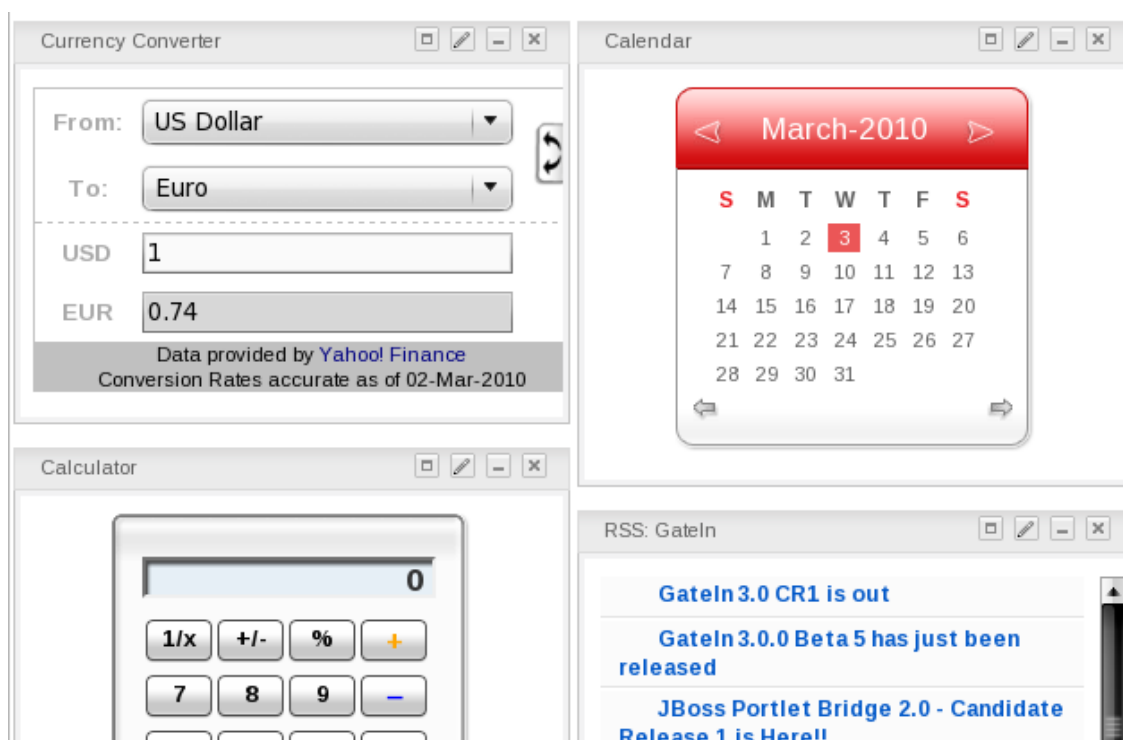


5. Paste the URL obtained in step 1 into the text box above the gadget list.





6. Click the **plus** icon to add the new gadget to the page.





# Portal Administration



## Note

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

## 4.1. Toolbar

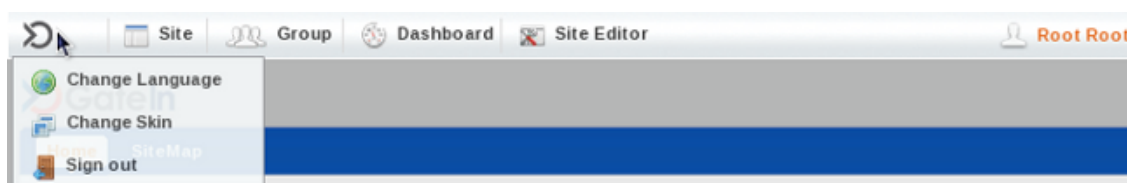
The Toolbar offers a convenient way for users and administrators to execute tasks within the portal quickly and easily.



### 4.1.1. User Actions in the Toolbar

#### User Menu

You can use the main menu (located under the product icon) to change the language or skin used in the portal or to sign out.



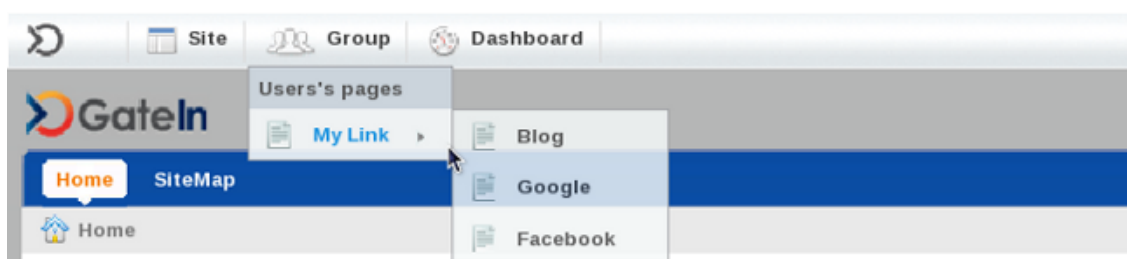
#### Site

The Site navigation function shows the different sites available in this Portal and allows users to directly edit the navigation tree.



#### Group

Using the Group navigation function users can easily see and access pages in the Portal.



### Dashboard

You can use the Dashboard to create your own pages of gadgets.



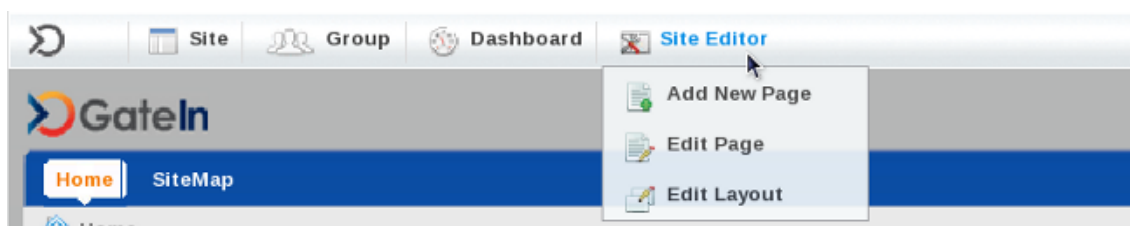
The name shown in the image above is the default and can easily be overtyped when the Dashboard is open.

### 4.1.2. Administration Actions in the Toolbar

#### Editor

Portal Administrators have access to another navigation that allows them to; add a new page to the current portal, edit a particular page's properties or to change a page's layout.

This navigation appears next to the Dashboard navigation in the Toolbar and is contextually-named. It will appear as either **Site Editor**, **Dashboard Editor** or **Group Editor** depending on the user's location within the portal.

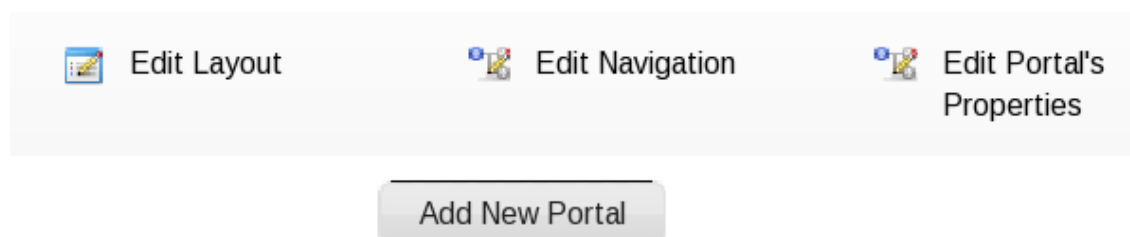


## 4.2. Manage Portals

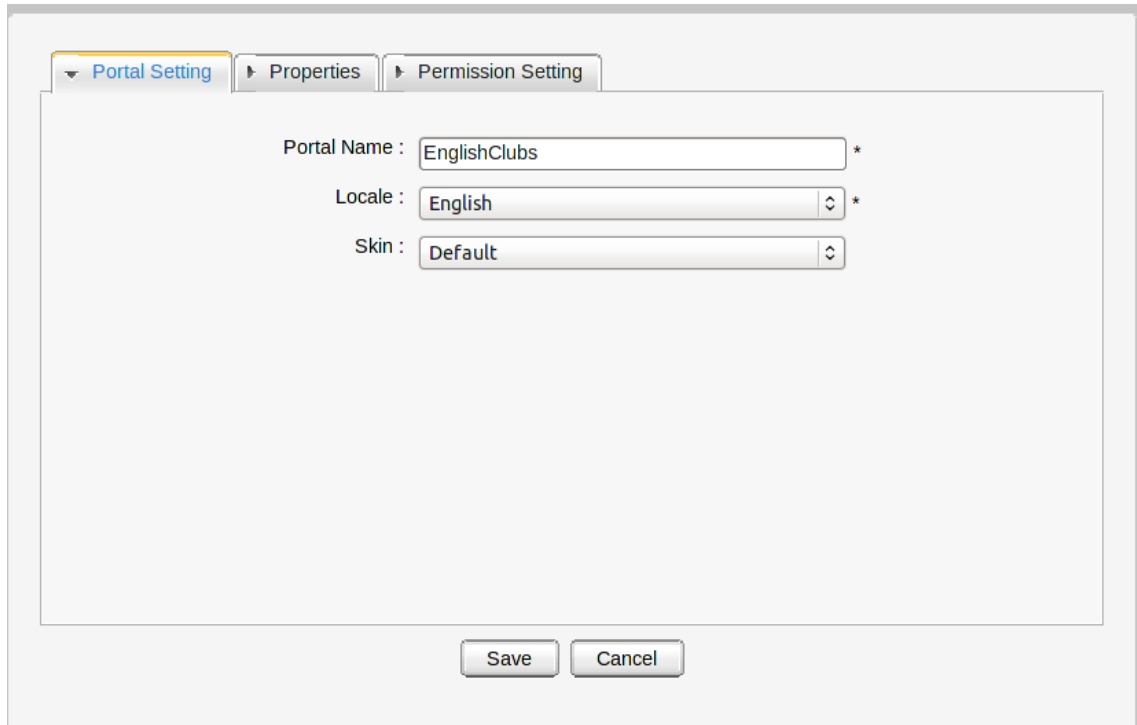
### 4.2.1. Create a New Portal

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

1. Click **Site** on the Administration bar, then click **Add New Portal**:

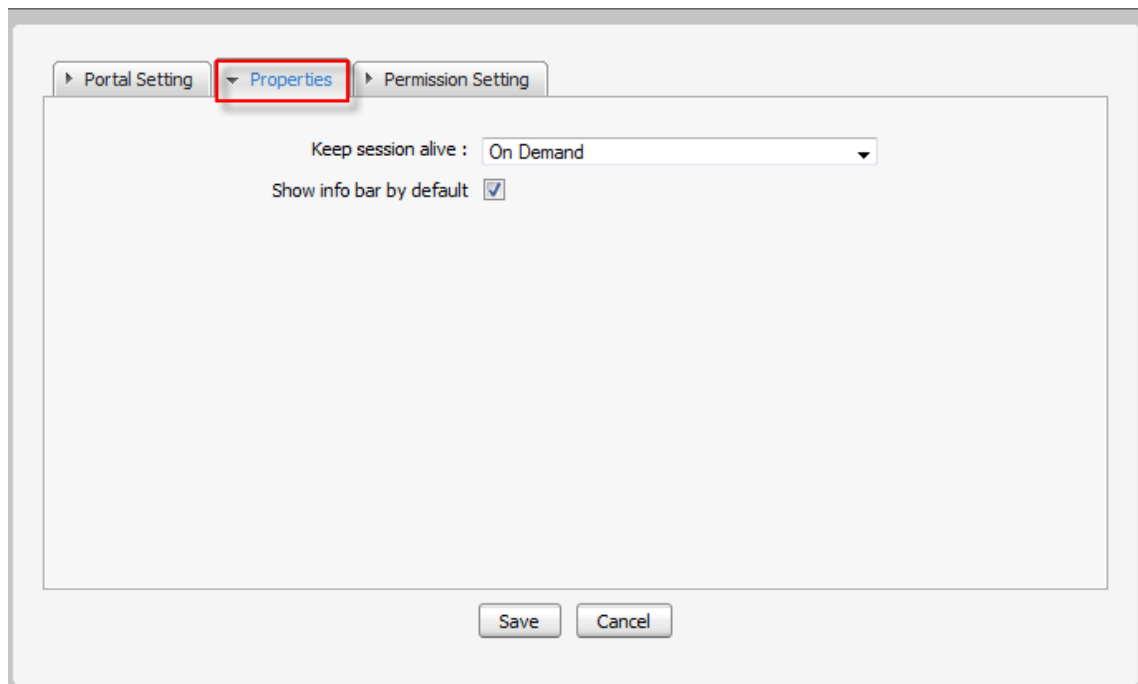


2. By default, the **Create New Portal** window which contains the **Portal Setting** will open:



The screenshot shows a dialog box titled 'Create a New Portal'. It has three tabs: 'Portal Setting' (selected), 'Properties', and 'Permission Setting'. The 'Portal Setting' tab contains three input fields: 'Portal Name' with the value 'EnglishClubs', 'Locale' with the value 'English', and 'Skin' with the value 'Default'. Each field has a small asterisk to its right. At the bottom of the dialog are 'Save' and 'Cancel' buttons.

3. Enter a string for the **Portal Name** field. This field is required and must be unique. Only alphabetical, numerical and underscore characters are allowed for this field and the name must have at least 3 characters and less than 30 ones.
4. Select the default display language for the portal in the **Locale** field.
5. Select a skin for a portal by selecting one from the skin list. Currently, there are two skin types available, including Default and SimpleSkin.
6. Click the **Properties** tab to set the properties of a portal.



**Keep session alive:** keeps the working session for a long time to avoid the working time out. There are 3 options:

- **Never:** The session will never timeout, even if an application requests it.
- **On-demand:** The session will timeout if an application requests it.
- **Always:** The session will time out after a set period.

**Show info bar by default:** The checkbox is ticked, it means that the info bar of the portlet is shown by default when the portlet is used in a page of the portal.

7. Click the **Permission Setting** tab and set the permissions for the Portal.

The access permissions list for the portal is empty by default. You have to select at least one or tick on the **Make it public** check box to assign access permission to everyone.

8. Click **Save** to accept creating the new portal, or **Cancel** to quit.

You also can edit or delete a portal. See [Section 4.2.3, “Edit a Portal”](#) or [Section 4.2.4, “Delete a Portal”](#) for more details.

### 4.2.2. Access a portal

If you want to access a portal, you must be in the Access Permissions list of that portal. For example: a portal's Access Permission list:

Make it public (everyone can access): ☐

Group Id	Membership Type	Action
/platform/administrators	manager	
/platform/guests	member	
/platform/users	*	

To access this portal, you must be a "manager" of group /platform/administrators or a "member" of /platform/guests or a user in /platform/user with any membership type. To add more access rights, click **Add Permission** and then select the desired group and membership type. There is a flexible option for you to choose if you want everyone to access the portal by just selecting the **Make it public** check box. In this case, the detailed access permission list disappears:

Make it public (everyone can access): ☒

After setting the access permission for the portal, users who have access can go into that portal in public mode by typing the public URL in browser (for example, <http://localhost:8080/portal/>). Furthermore, users can access to that portal in private mode by signing in the public mode. There is also a direct URL for the private mode: (for example, [http://localhost:8080/portal/private/\[new-portal-name\]](http://localhost:8080/portal/private/[new-portal-name])). Users who only have the access permission on the portal can view pages but they cannot change any information of that portal. You can set access permissions for a portal when you create or edit it.

### 4.2.3. Edit a Portal

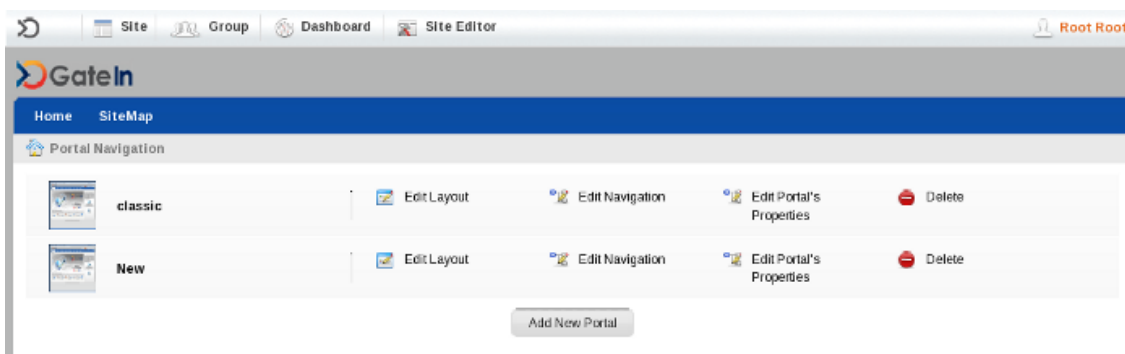
The function is to change information of the current portal, such as properties, or layouts. To do this, you must have the edit permission. Please contact your administrator to get more permissions. When you have the edit permission, follow one of two ways below to edit the portal:

#### The first way:

1. Hover your cursor over **Site** on the administration bar and select the portal you want to edit from the drop-down menu.
2. Select **Site Editor**, then **Edit Layout** on the administration bar.

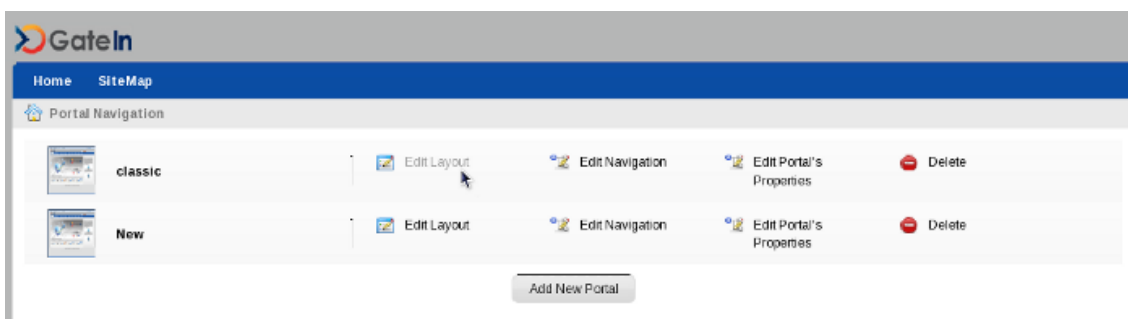
#### The second way:

- Click **Site** on the Toolbar. A list of active portals will appear:

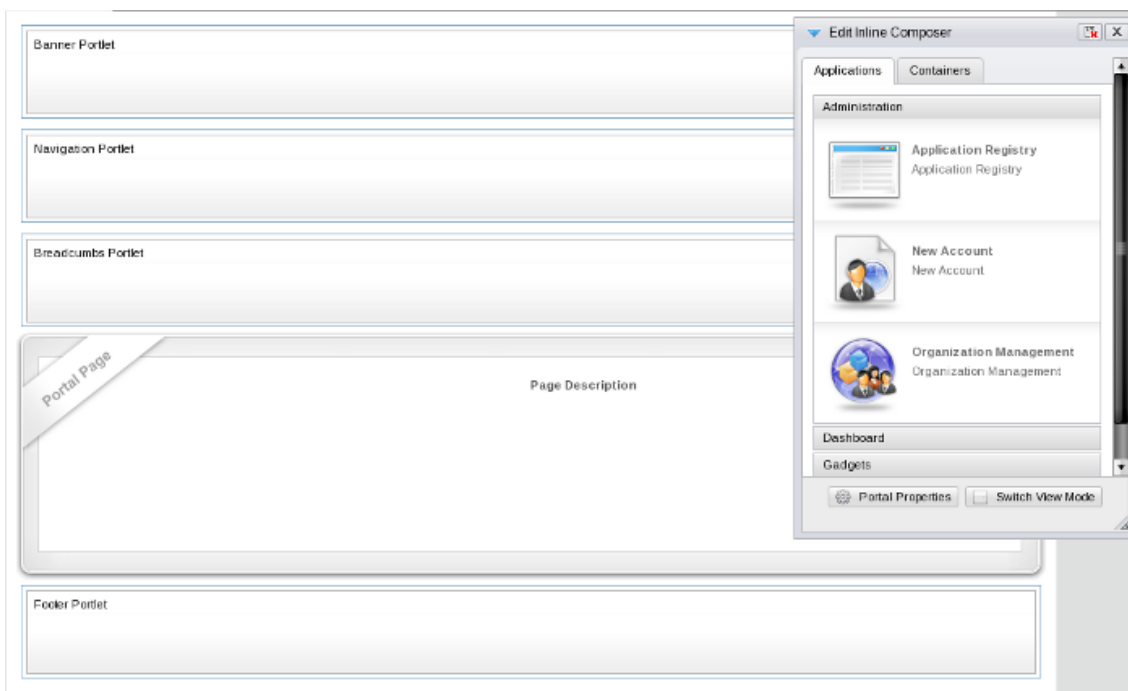


### 4.2.3.1. Edit Layout

To edit the layout of a portal, click the *Edit Layout* key beside the active portal you wish to edit:

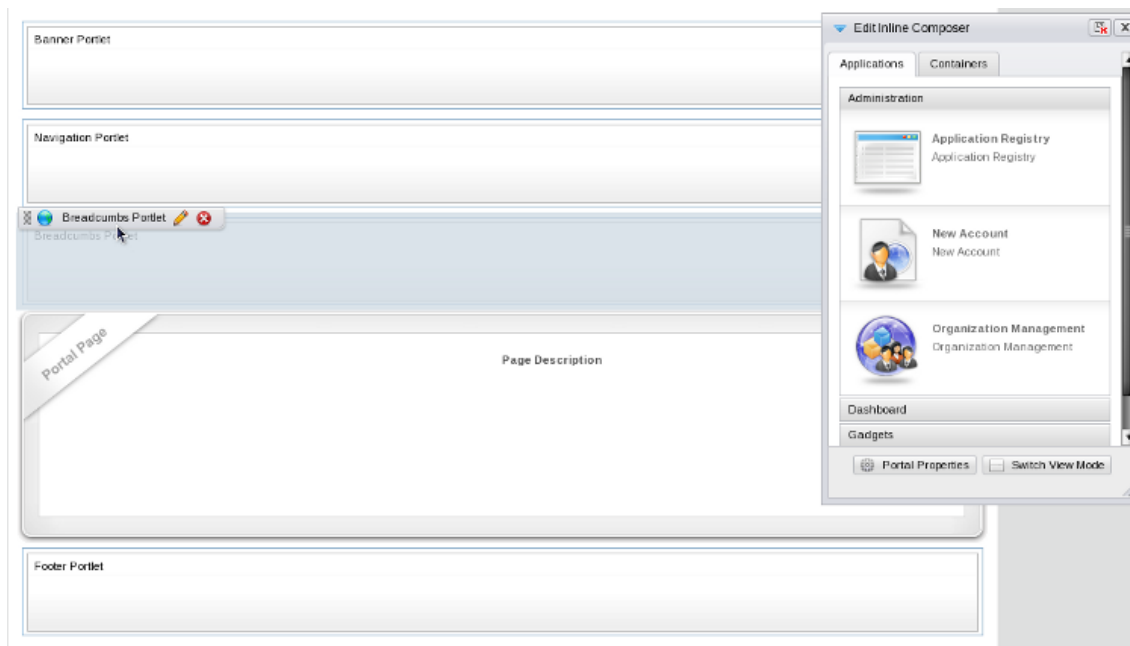


New applications, containers or gadgets can be dragged from the **Edit Inline Composer** window (inset on the right of the screen) onto the main portal body.



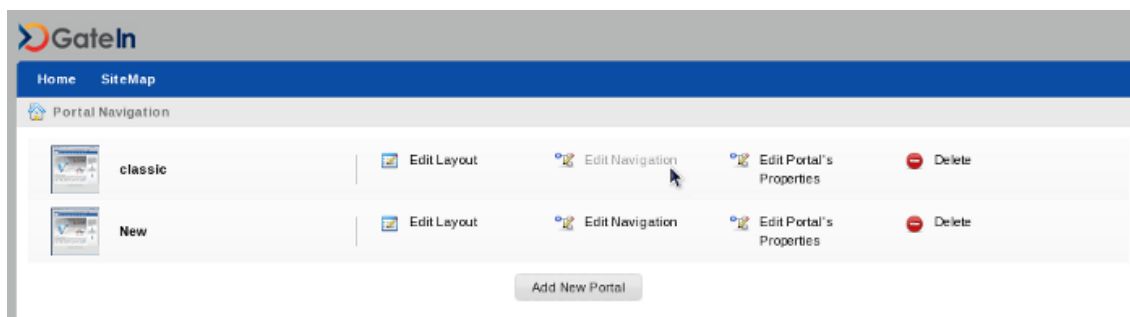


Elements already in place in the portal body can be rearranged or removed as required. Use the relevant button in the overlay that appears when you mouse-over each element:

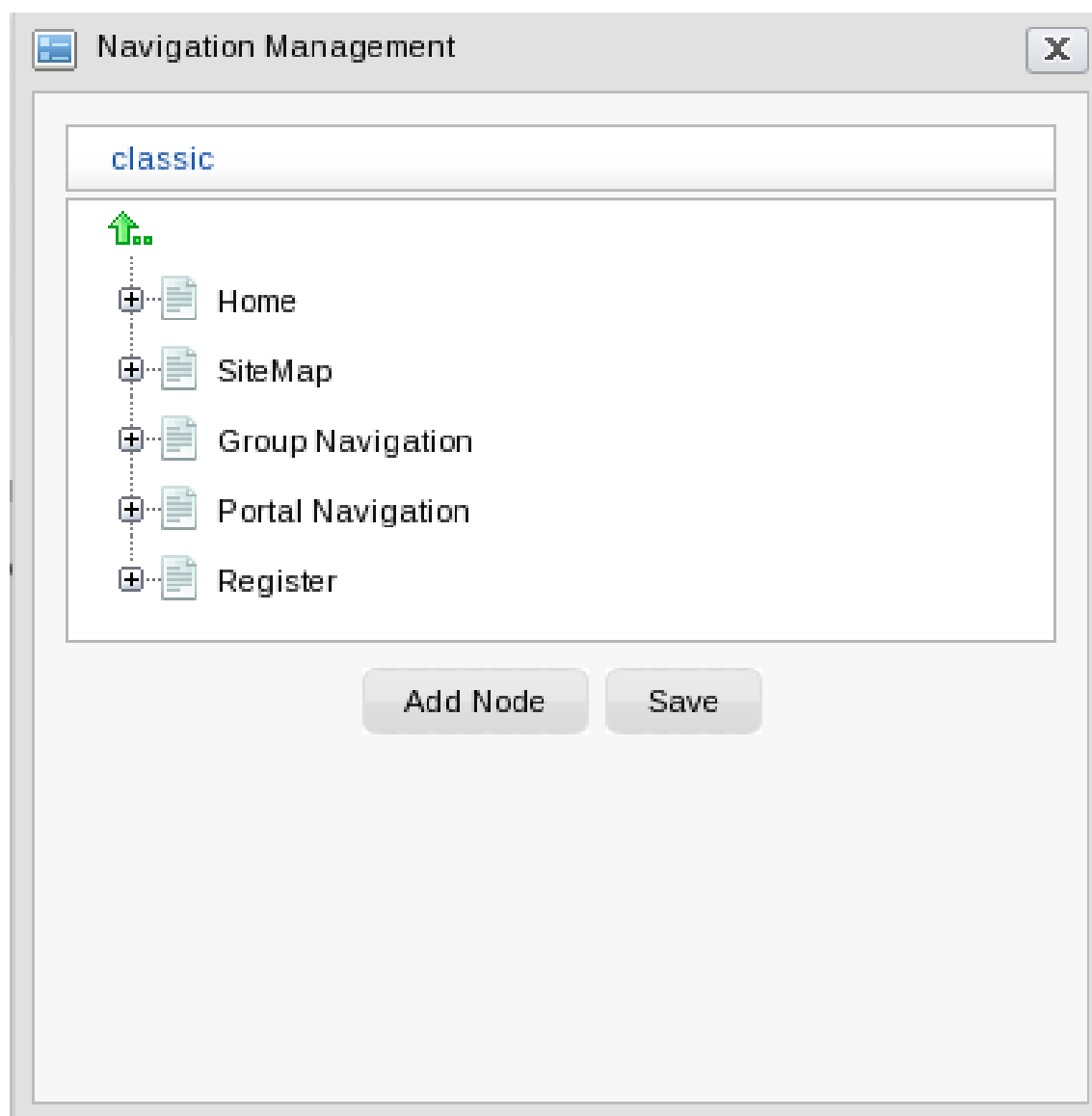


#### 4.2.3.2. Edit Navigation

The portal navigation can be edited by clicking **Site** in the **Toolbar** and selecting the *Edit Navigation* link next to the portal you wish to edit:



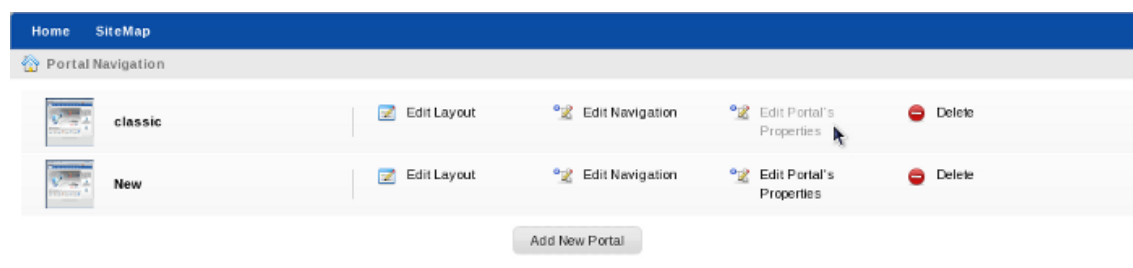
The *Navigation Management* window appears:



More information about actions possible in this window can be found in [Section 4.3, “Manage Navigation Nodes”](#)

### 4.2.3.3. Edit Properties

Portal properties such as language, description, label, skin and permissions can be set by clicking **Site** in the **Toolbar** and selecting the *Edit Portal Properties* link for the portal you wish to edit:



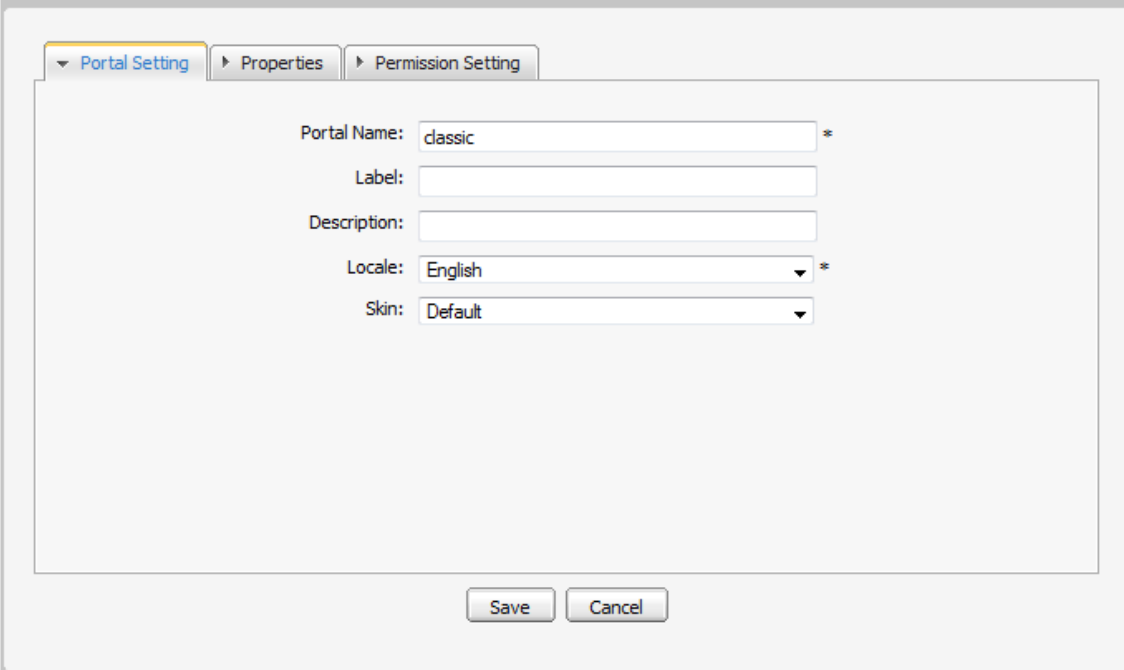
Or

click

(@) Java Center

in Edit Inline Composer basing on [The first way](#):

The form to edit the portal properties will appear:



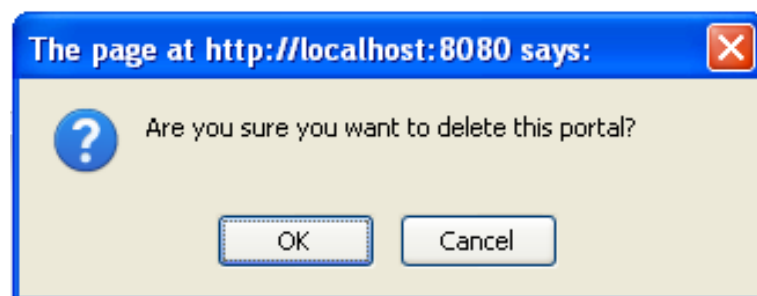
The various tabs available in the edit properties window give access to the properties that can be edited for the chosen portal.

Click **Save** or **Cancel** to either set or discard any changes you have made in the portal.

#### 4.2.4. Delete a Portal

1. To delete a portal, click the Delete icon beside the portal you no longer require.

The confirmation message will appear:



2. Click **OK**

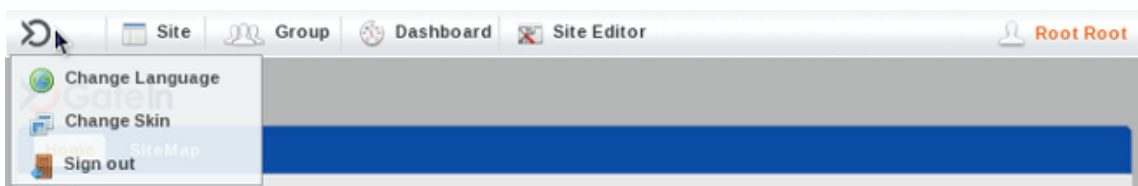
### 4.2.5. Change Portal Skins

Skins are graphic styles used to provide an attractive user interface. Each skin has its own characteristics with different backgrounds, icons, and other visual elements.

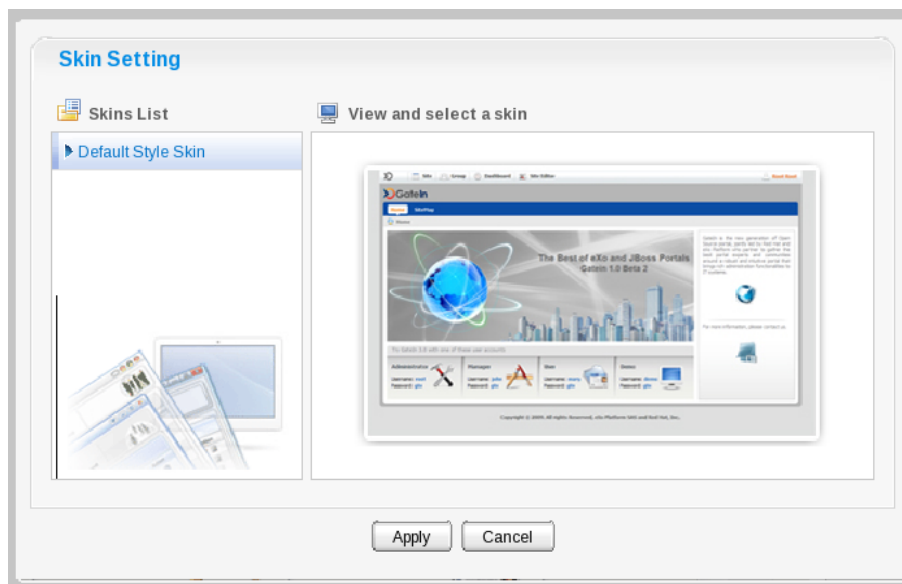
Skins can be changed temporarily (and are reset at log-out) or permanently.

#### Change the skin temporarily

1. Mouse over the Start menu and click **Change Skin**.



2. Select a new skin from the Skin list. By clicking on the skin name a picture will appear in the preview pane.



3. Click **Apply** to apply to the portal.

#### Change the skin permanently

1. Click **Site**, the nEdit Portal's Properties.
2. In the **Portal Setting** tab, select another skin **Skin** list

Portal Setting Properties Permission Setting

Portal Name : classic \*

Label :

Description :

Locale : English \*

Skin : Default

Default

SimpleSkin

Save Cancel

3. Click **Save** to finish your change.

More information about adding skins to a portal can be found in the Reference Guide for this product.

## 4.2.6. Switching between Portals

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

To switch between portals, mouse over **Site** on the Toolbar for a list all portals in which you have at least access rights, then click the desired portal. Please wait a few seconds for the change to take effect:

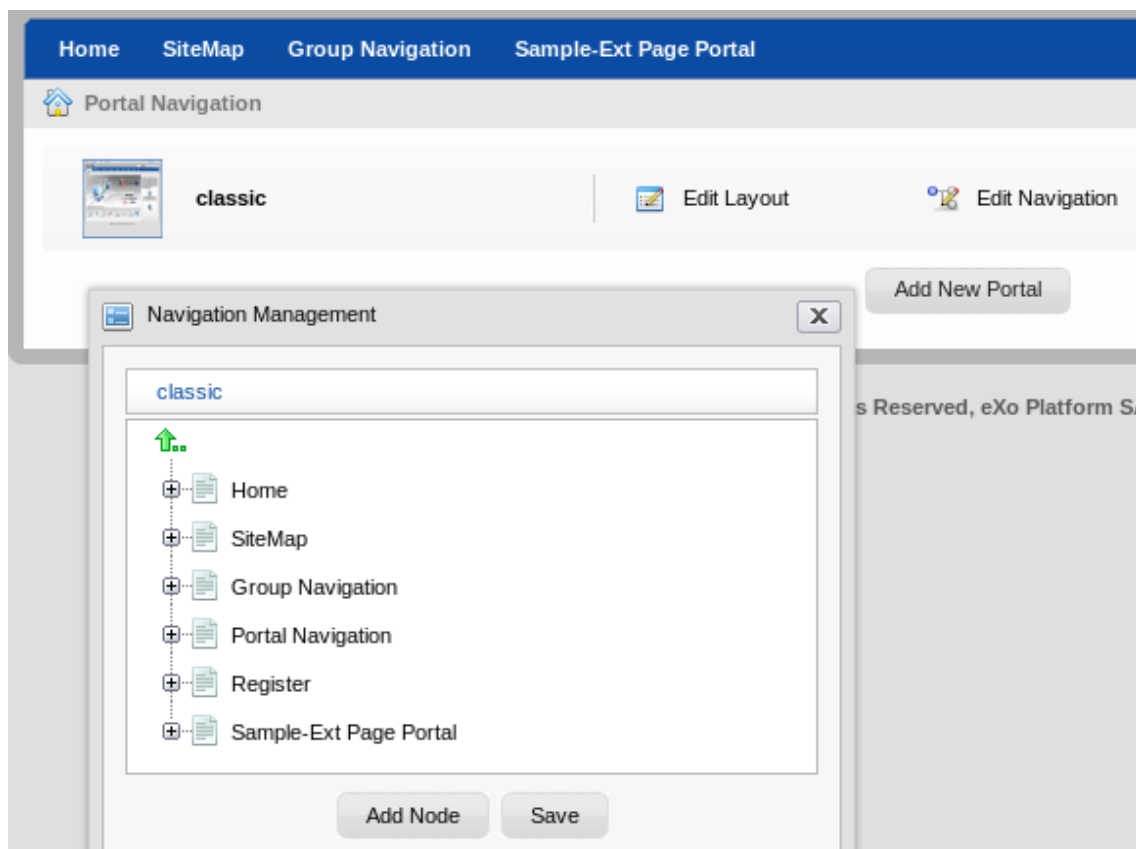


## 4.3. Manage Navigation Nodes

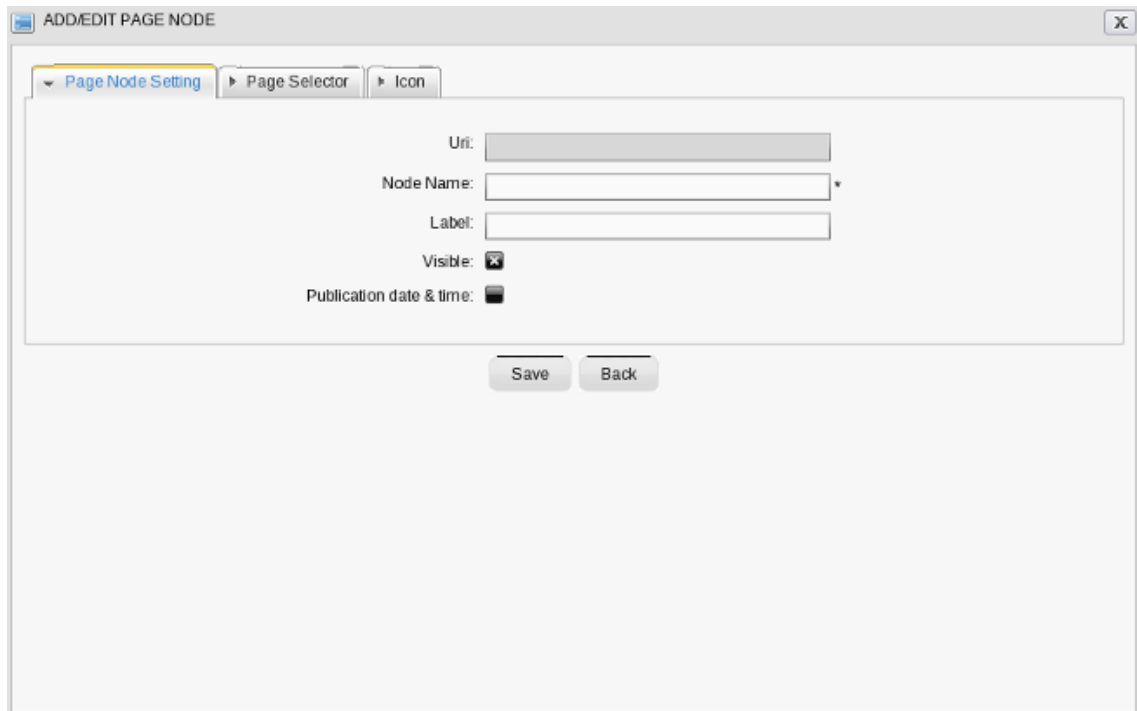
If you are the portal administrator (or the administrator has granted you the appropriate permission privileges) you can execute all actions related to portal nodes. These actions include adding new nodes or editing, copying, moving, deleting or cloning existing nodes.

### 4.3.1. Add a new node

1. Click on **Site** then click on **Edit Navigation** of the portal you want to modify.



2. Select a node from list (to create a new node like sub-node of the selected node) or click the **Up** icon to create a new node at the root level of the portal.
3. Right-click on the selected navigation or node and select **Add new Node** option. The **Add new node** form appears:



The **Page Node Setting** tab includes:

#### **Uri**

An identification of the node. The Uri is automatically created after adding a new node

#### **Node name**

The name of the node. This field is required and must be unique. Only alpha, digit and underscore characters are allowed for this field and it must have at least 3 characters.

#### **Label**

The display name of the node on the screen. This field is not required and may be changed. This field must have a length between 3 and 120 characters.

#### **Visible**

This check box allow to hide (and show) the page and its node at the navigation bar, the page navigation and the site map

#### **Publication date & time**

This option allows publishing this node for a period of time. *Start Publication Date* and *End Publication Date* only appear when this option is selected.

#### **Start Publication Date**

The start date and time to publish the node.

#### **End Publication Date**

The end date and time to publish the node.

In the **Page Selector** tab, you can select a page or not for this node.

The screenshot shows a web interface with three tabs: 'Page Node Setting', 'Page Selector' (which is active), and 'Icon'. Below the tabs is a section titled 'Current Selected Page Info' with an information icon. Inside this section, there is a light blue box containing the following text: 'Page Id: portal::classic::page5170499', 'Name: page5170499', and 'Title: ddd'. To the right of this text is a document icon with a blue checkmark. Below the light blue box are two buttons: 'Clear Page' (with a trash icon) and 'Search and Select Page' (with a green checkmark icon). At the bottom of the entire window are 'Save' and 'Cancel' buttons.

**Page Id**

The identification string of the page.

**Name**

The selected page's name.

**Title**

The selected page's title.

You do not have to enter values in these fields. They are automatically populated after selecting an existing page by clicking the **Search and Select Page** button.

The **Select Page** form appears:

The screenshot shows a window titled 'Select Page'. At the top, there are three input fields: 'Title', 'Site Name', and 'Type' (which is a dropdown menu currently showing 'portal'). Below these fields is a table with five columns: 'Page Id', 'Title', 'Access Permission', 'Edit Permission', and 'Action'. The table contains five rows of data, each with a green checkmark in the 'Action' column.

Page Id	Title	Access Permission	Edit Permission	Action
portal::classic::homepage	Home Page	[Everyone]	*:/platform/administrators	✓
portal::classic::groupnavigation	Group Navigation	*:/platform/users	*:/platform/administrators	✓
portal::classic::portalnavigation	Portal Navigation	*:/platform/users	*:/platform/administrators	✓
portal::classic::register	Register	*:/platform/guests	*:/platform/administrators	✓
portal::classic::sitemap	Site Map	[Everyone]	*:/platform/administrators	✓

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



To select a page for creating a node, simply select a page from the list or search for a specific page as follows:

1. Enter your page title into the **Title** field to do search to Title;

Page Id	Title	Access Permission	Type	Action
group::platform/guests::site:map	Site Map	[*:/platform/guests]	*:/platform/administrators	✓
group::organization/management	New Staff	[*:/organization/management/ex	manager:/organization/management	✓
group::platform/administrators::	New Account	[manager:/platform/administrator	manager:/platform/administrators	✓
group::platform/users::mylink-bl	Blog	[*:/platform/users]	*:/platform/administrators	✓
group::platform/guests::link	Link	[*:/platform/guests]	*:/platform/administrators	✓
group::organization/management	Organization Management	[*:/organization/management/ex	manager:/organization/management	✓
group::platform/administrators::	Community Management	[manager:/platform/administrator	manager:/platform/administrators	✓
group::platform/users::mylink-re	Red Hat	[*:/platform/users]	*:/platform/administrators	✓
group::platform/administrators::	Registry	[manager:/platform/administrator	manager:/platform/administrators	✓

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

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

2. Select the area in which you wish to search into the **Type** field.

3. Click



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

4. Click



on the row of the page you wish to select.

After selecting a page, the details of this page will be displayed in the **Page Selector** form.

After configuring the page node settings, the page selector and the node's icon, click the **Save** button to accept or the **Cancel** button to quit without creating a new node.



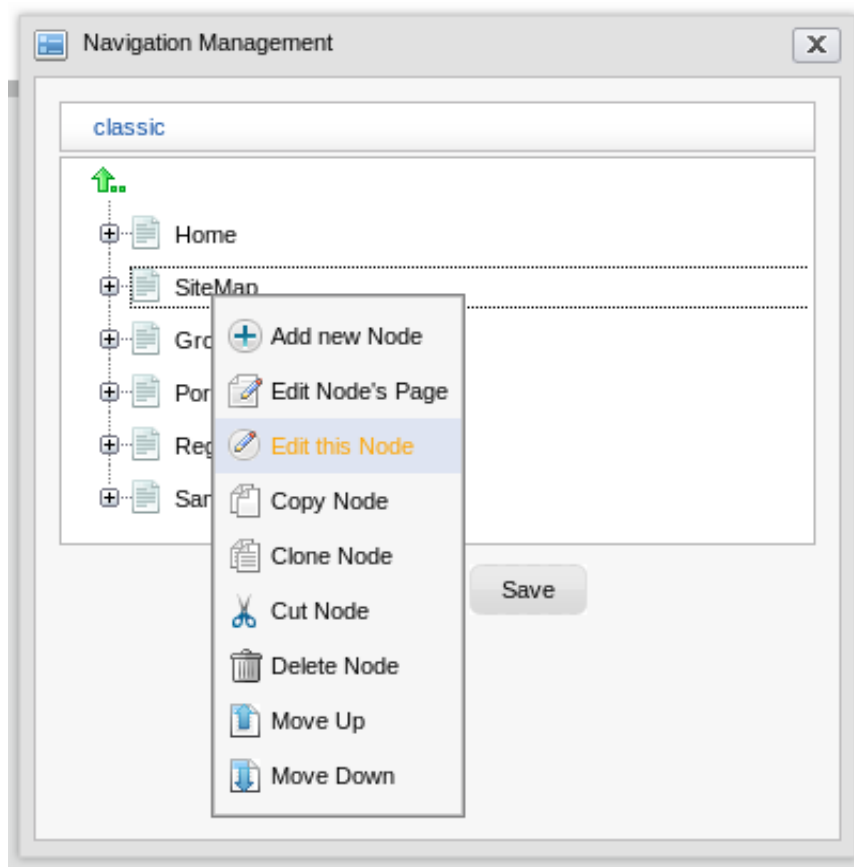
### Note

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

### 4.3.2. Edit a node

This function is used to edit the node setting and re-select a page for a node.

1. Click **Site**, then click **Edit Navigation** of the portal you want to modify.
2. Right-click the selected node and select **Edit this Node** option.



This will display a form to edit this node:

The screenshot shows a web application window titled 'ADD/EDIT PAGE NODE'. It has three tabs: 'Page Node Setting' (selected), 'Page Selector', and 'Icon'. The 'Page Node Setting' tab contains the following fields and controls:

- Uri:** A text input field containing the value 'home'.
- Node Name:** A dropdown menu with 'home' selected.
- Label:** A text input field containing the value 'Home'.
- Visible:** A checkbox that is checked.
- Publication date & time:** A date and time picker.

At the bottom of the dialog, there are two buttons: 'Save' and 'Back'.

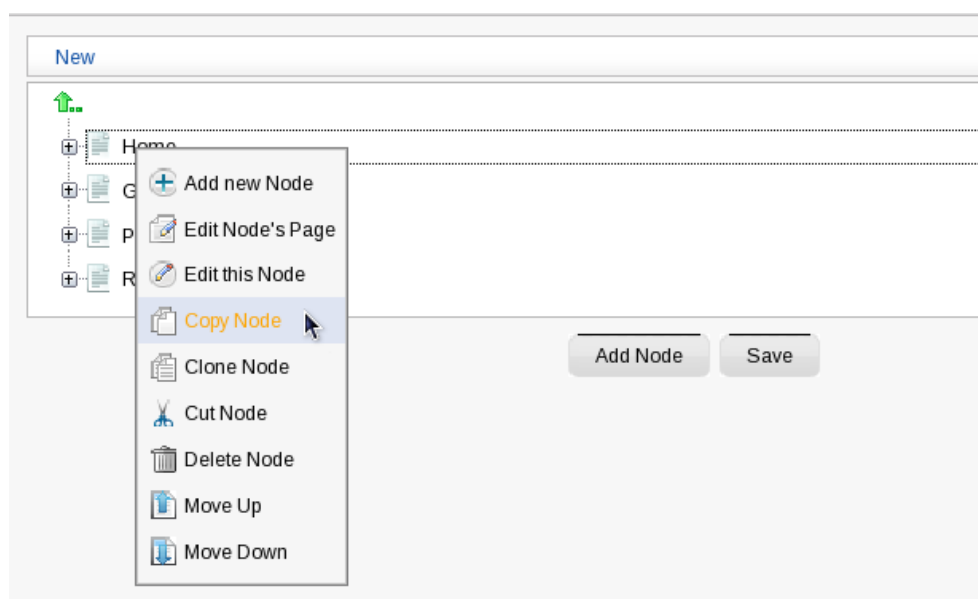
3. In the **Page Node Setting** tab you can change the value of these fields:
  - Label
  - Visible
  - Publication Date & time
4. After you finish making the desired changes, click the **Save** button to accept changes or **Cancel** button to exit without change.
5. In the **Page Selector** tab you can also search and select another page for this node by clicking the **Search and Select Page** button.

You can see more details on how to select a page for a node in [Section 4.3.1, "Add a new node"](#).
6. After you finish edit any another page required for this node, click the **Save** button to accept changing or **Cancel** button to leave without saving any changes.

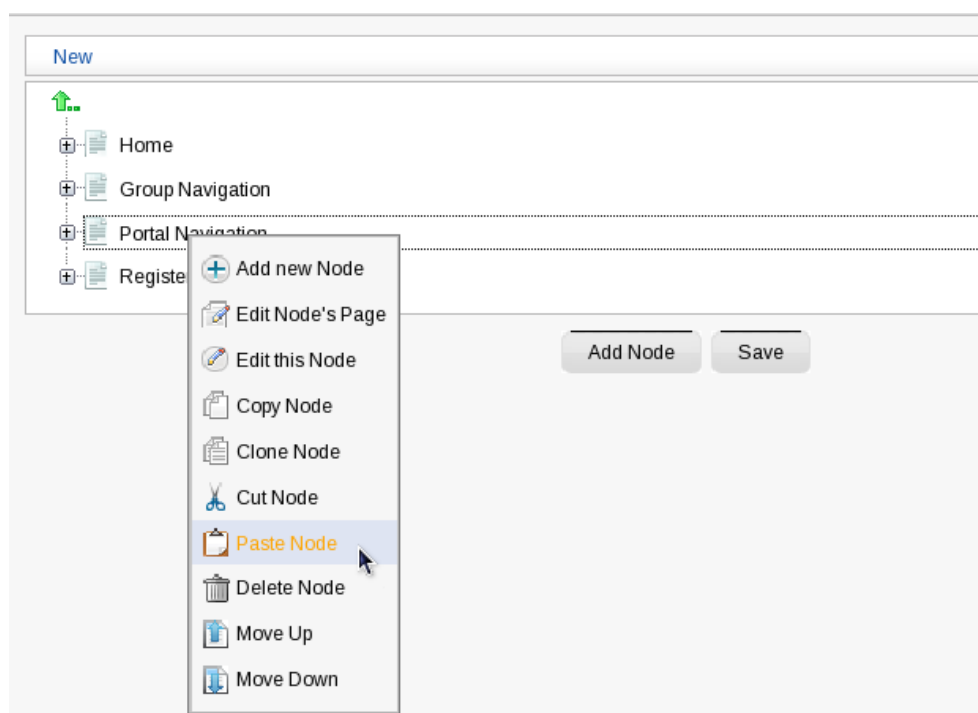
### 4.3.3. Copy a node

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

1. Click **Site**, then click **Edit Navigation** of the portal you want to modify.
2. Right-click the selected node and select **Copy node** option.



3. Select the position that you want to paste this node and select **Paste Node** option. Click the mark icon to **Save**.



### Note

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

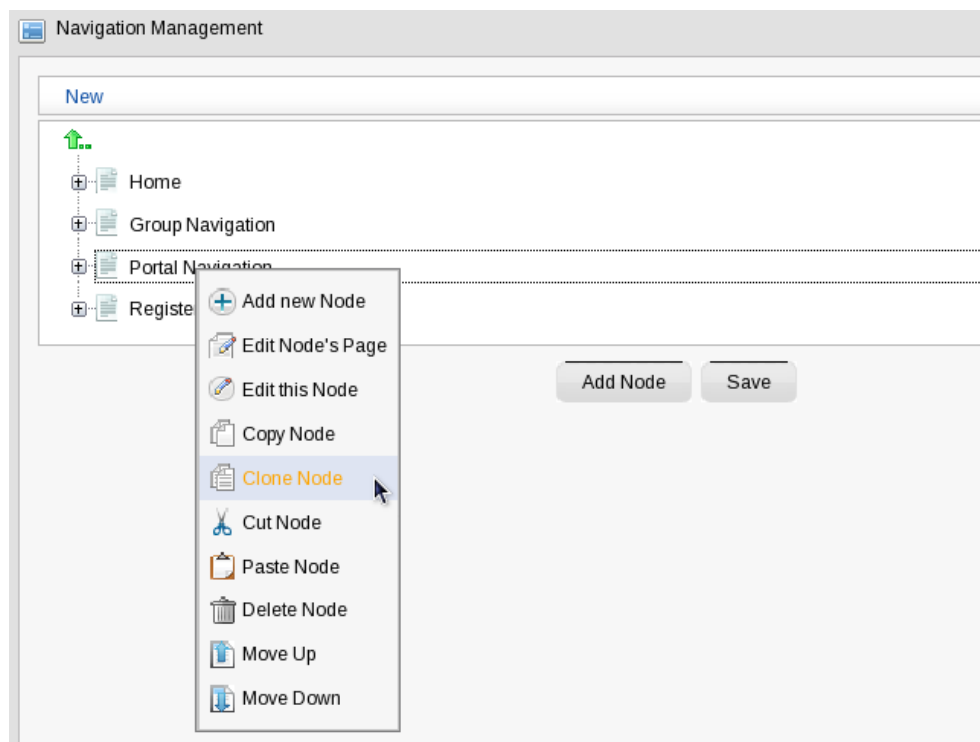
### 4.3.4. Clone nodes

The **Clone node** function allows you to copy a node.

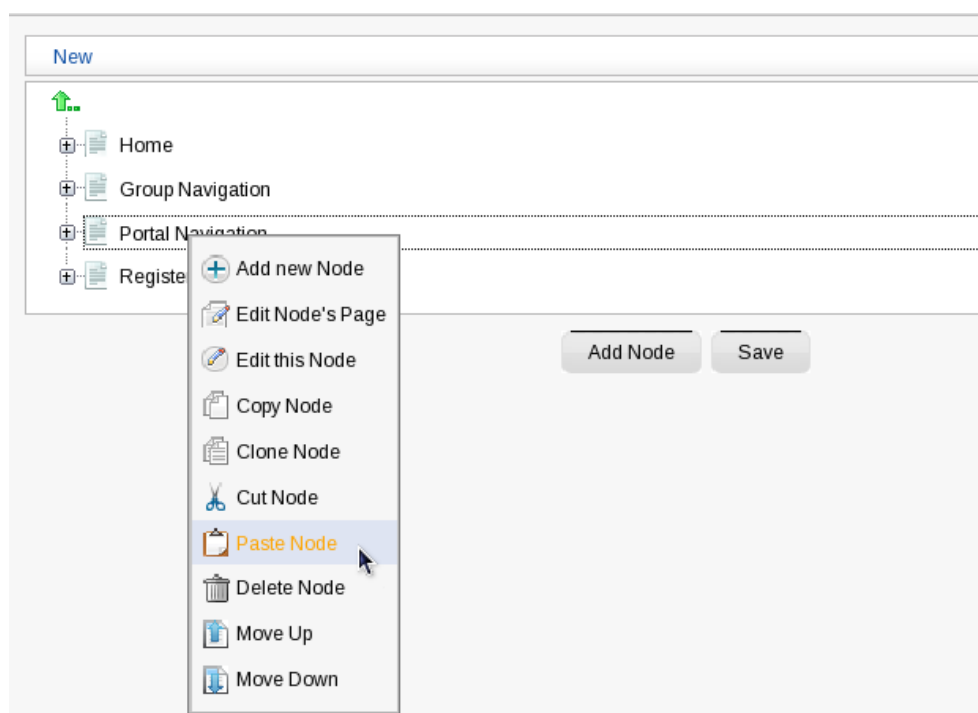
The differences between **clone node** and **copy node** is that the clone node has its own page and which has the same content as the selected node.

Therefore there will be a new page that has the same name as the cloned node's page shown in the page list when you access **Manage Pages**.

1. Click **Site** then click **Edit Navigation** of the portal you want to modify.
2. Right-click selected node and select **Clone node** option.

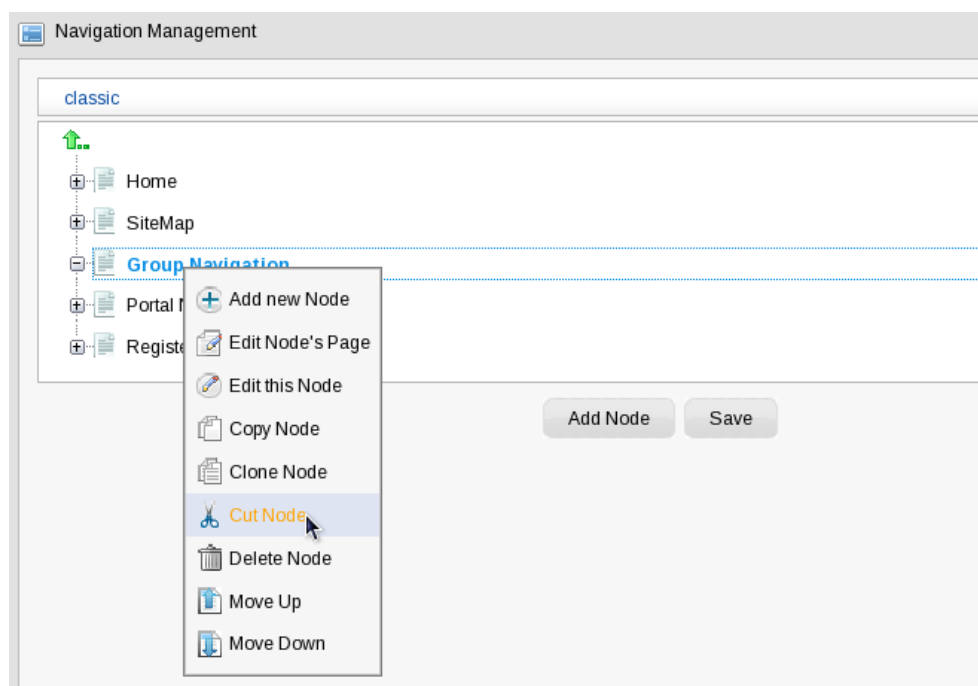


3. Select the position that you want to paste this node and select **Paste Node** option. Click the mark icon to **Save**.

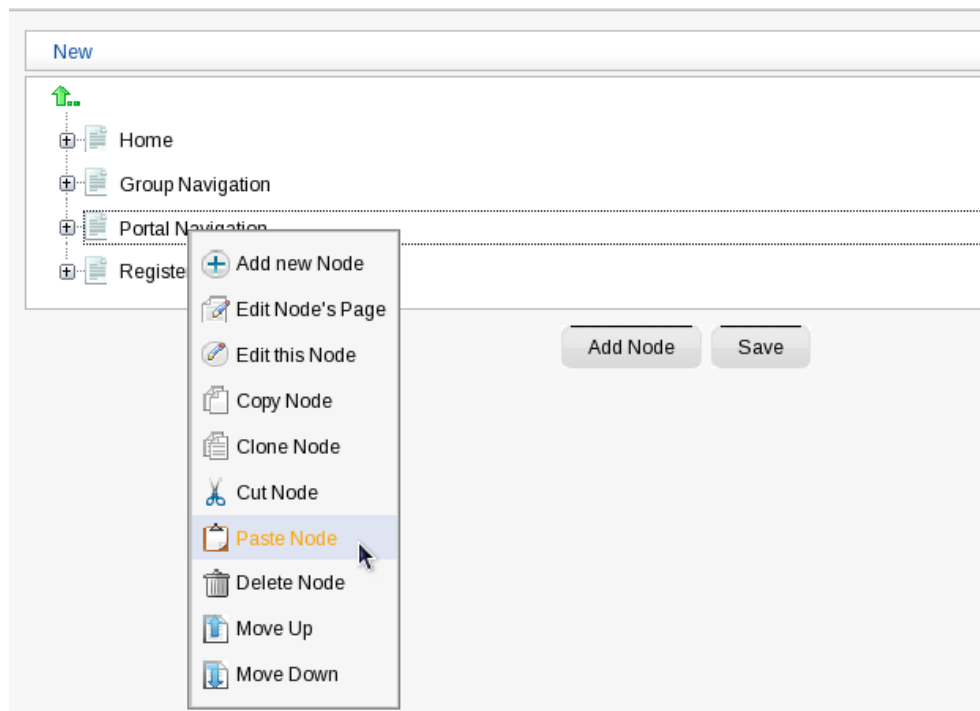


### 4.3.5. Cut a node

1. Click **Site** then click **Edit Navigation** of the portal you want to modify.
2. Right-click the selected node and select **Cut node** option.



3. Select the position that you want to paste this node and select **Paste Node** option. Mark icon to **Save**.

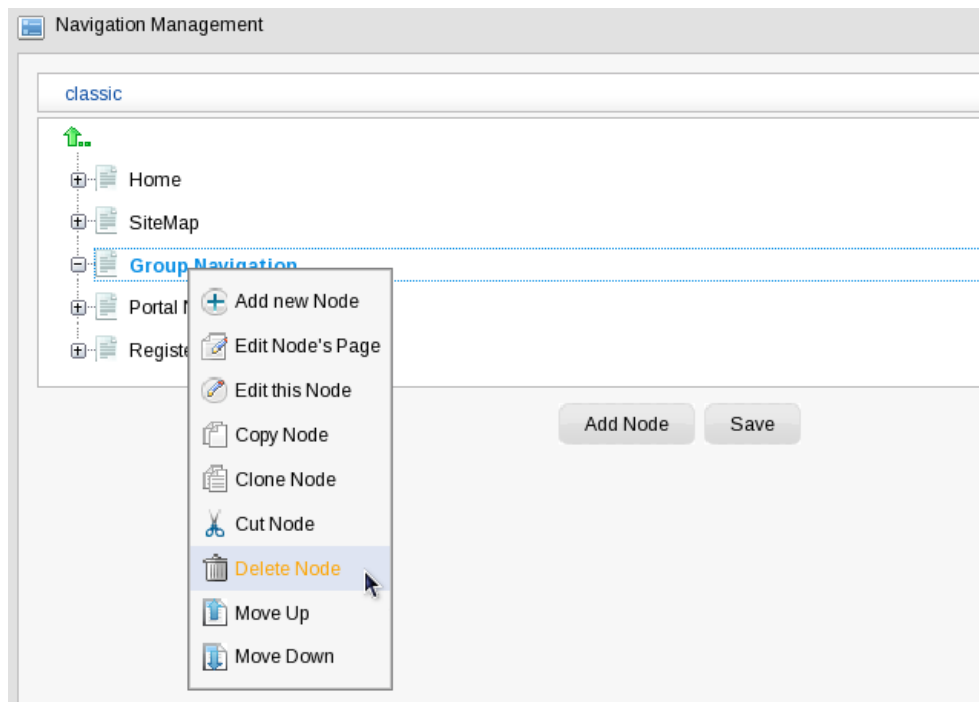


### Note

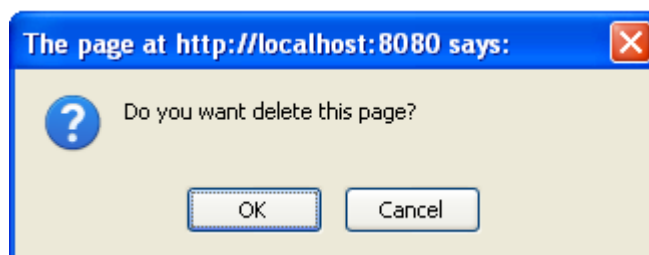
Two same node names in the same place are not allowed.

## 4.3.6. Delete a node

1. Click **Site** then click **Edit Navigation** of the portal you want to modify.
2. Right-click the selected node and select **Delete node** option.



3. It will display an alert message confirming the removal of the node. Click the **OK** button to accept the deletion or **Cancel** button to quit without deleting the node.



### Note

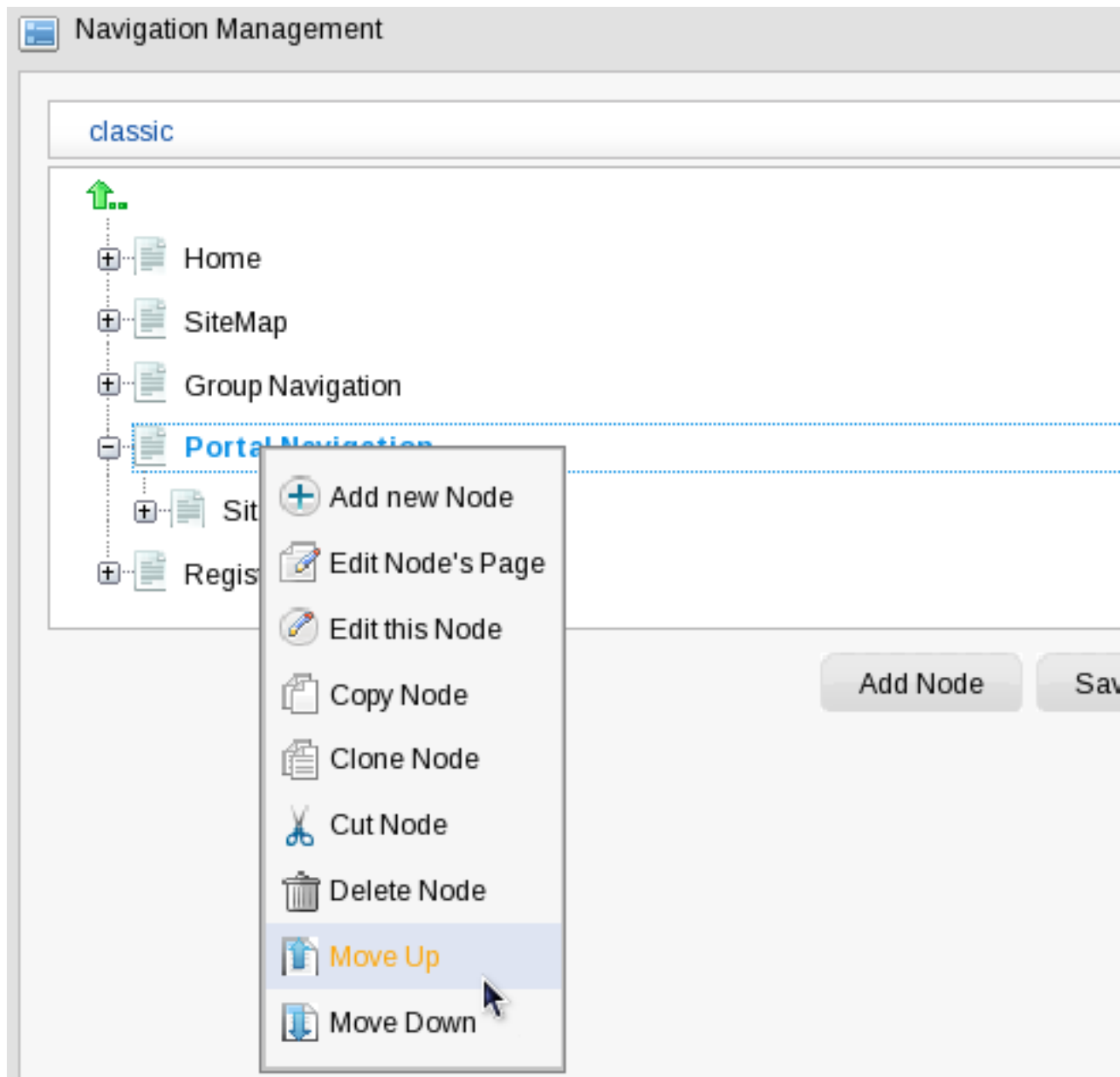
You, even as an administrator, cannot cut or delete **FOUR** system navigations, including **Group Navigation**, **Portal Navigation**, **Register** and **NotFound**. Also, you cannot cut or delete these system nodes which have been copied or cloned in the new positions. However, you can cut or delete them through cutting or deleting the node containing them, except system nodes.

### 4.3.7. Change Node Order

You can easily change the position of nodes in the navigation bar following these steps:

1. Click **Site**, then click **Edit Navigation** of the portal you want to modify.
2. Select the node that you want to move. Right-click the selected node and then click **Move up** or **Move down**





3. The selected node will be moved up or down within the list.

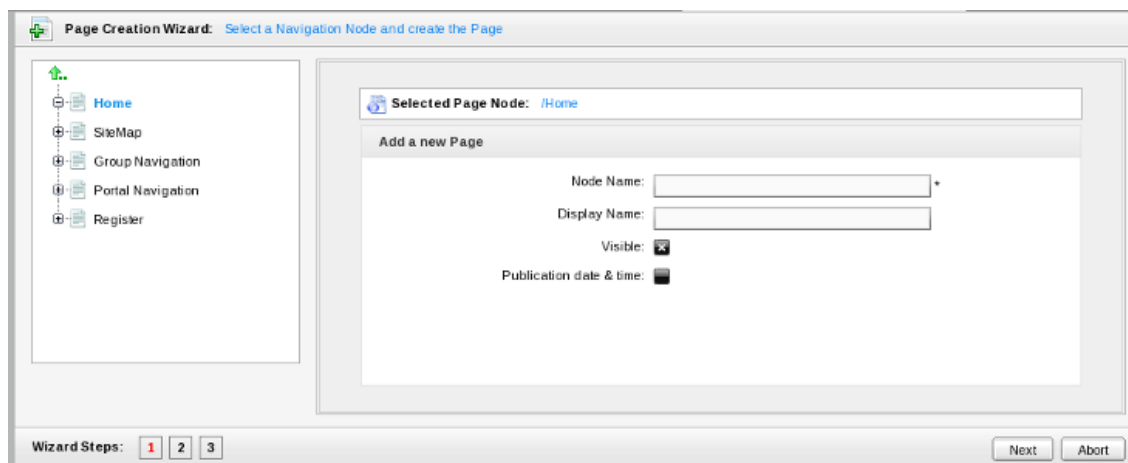
## 4.4. Manage Pages

### 4.4.1. Adding a new Page

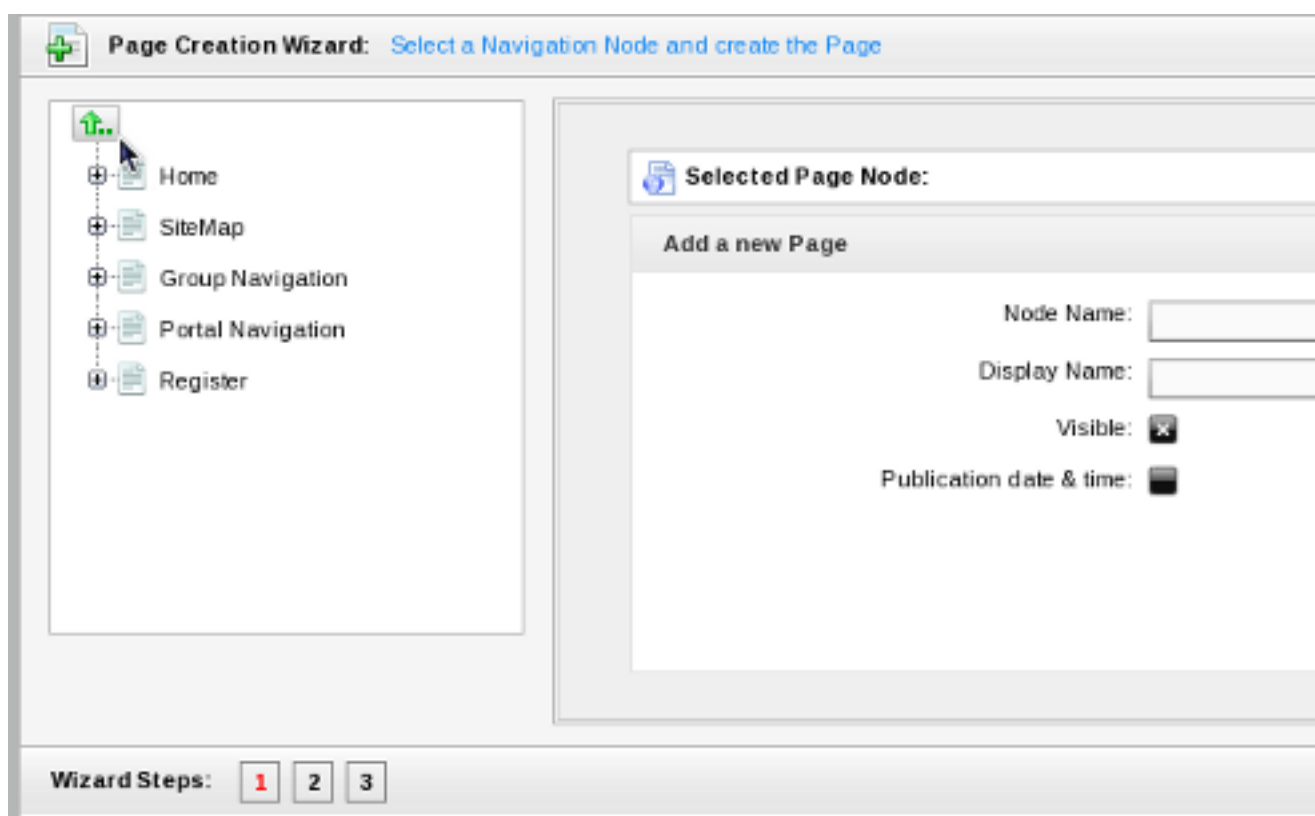
#### 4.4.1.1. Adding a new Page using Page Creation Wizard

A page creation wizard is available to administrators in order to create and publish portal pages quickly and easily.

1. Mouse over **Site Editor** then select **Add New Page**.



2. The wizard window is divided into two sections: the left pane contains the existing page/node hierarchy and the right pane displays the **Page Editor**.
3. In the left pane, you can navigate up and down the node/page structure:



4. In the right pane are the required parameters for a new page:

### Current Selected Page Node

The path of the selected node to add a new sub page

**Node Name**

The node name of the added page. It is required field. This field must start with a character and must have a length between 3 and 30 characters.

**Display Name**

The display name of the node which contains the added page and must have a length between 3 and 30 characters.

**Visible**

This checkbox toggles the global visibility of this page.

If checked the page or the page node appears on on the navigation bar, the page navigation and the site map. If "visible" is checked the visibility depends on the "publication date & time" attribute.

If unchecked the page is not shown under any circumstances, even if the publication period valid.

**Publication date &time**

This option allows publishing the page for a period of time. If this option is checked the visibility of the page depends on the publication period start and end date.

**Start Publication Date**

The start date and time to publish the page

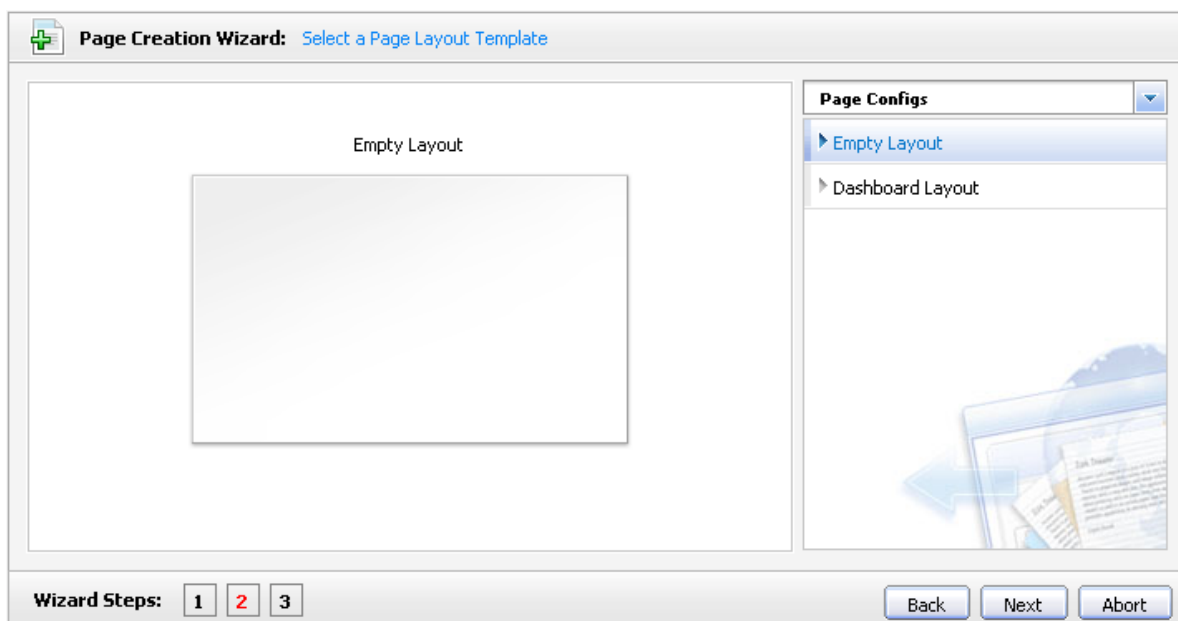
**End Publication Date**

The end date and time to publish the page.

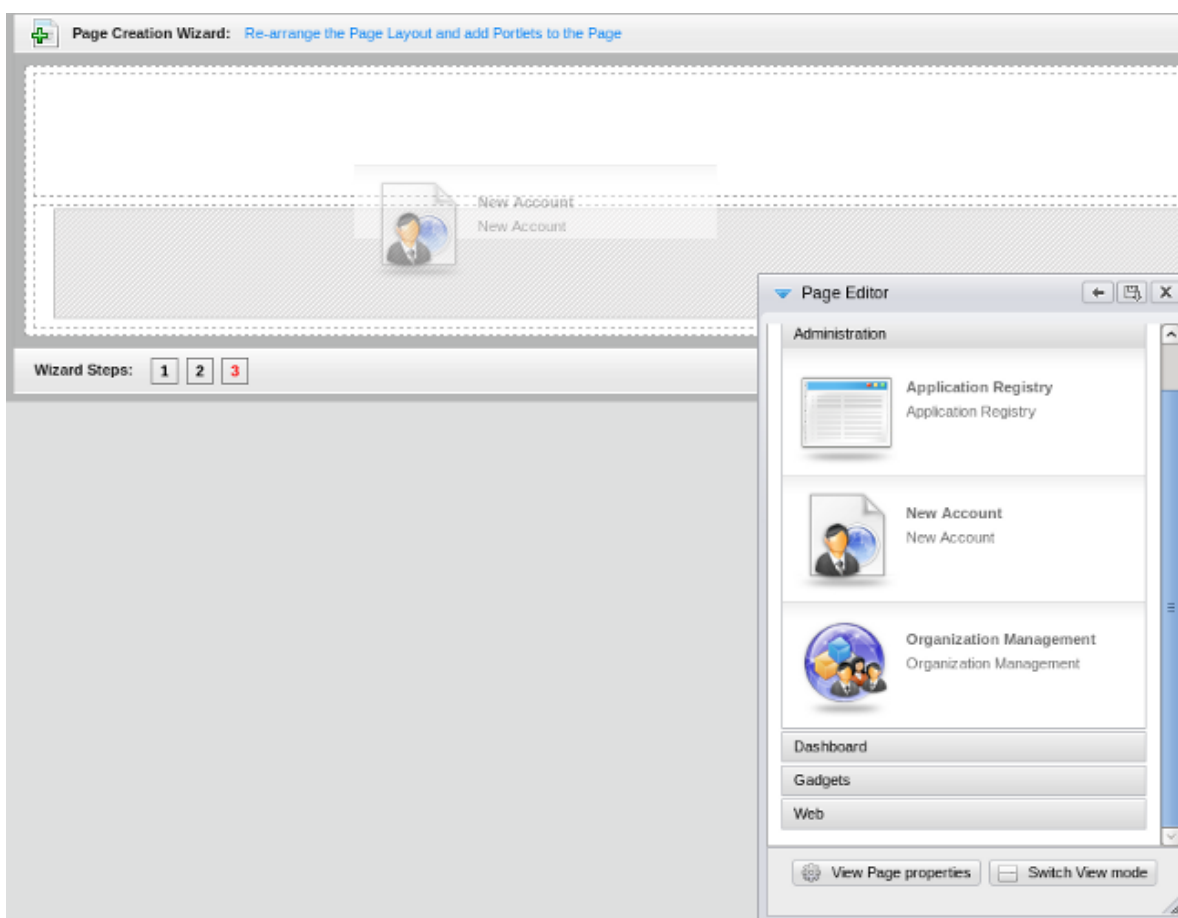
**Setting Time and Date**

You can set date and time by clicking the **Start Publication Date** field and **End Publication Date** field and select a date in the calendar pop up

5. Click **Next** or number '2' of the wizard steps to go to step 2.



6. Select **Empty Layout** or click the icon to see more templates to select.
7. Click the **Next** button or number '3' of the wizard step to go to step 3. You can drag portlets from the popup panel into the main pane to create the content of this page.



**Applications**

Allows listing all existing portlets

**Containers**

Allows listing all existing containers

**Switch View mode**

Allows viewing a page in preview mode

8. Click the **Show Container** icon if you want to see the existing containers and re-select the layout of the page. You can click on the **Switch** icon to view the content of this page.
9. Click **Save** to accept creating a new page, **Back** to return the previous step or **Abort** button to quit without creating a new page.

#### 4.4.1.2. Adding a new Page using Page Management

1. Mouse over **Group** in the Toolbar, highlight **Administration** then select **Page Management**.

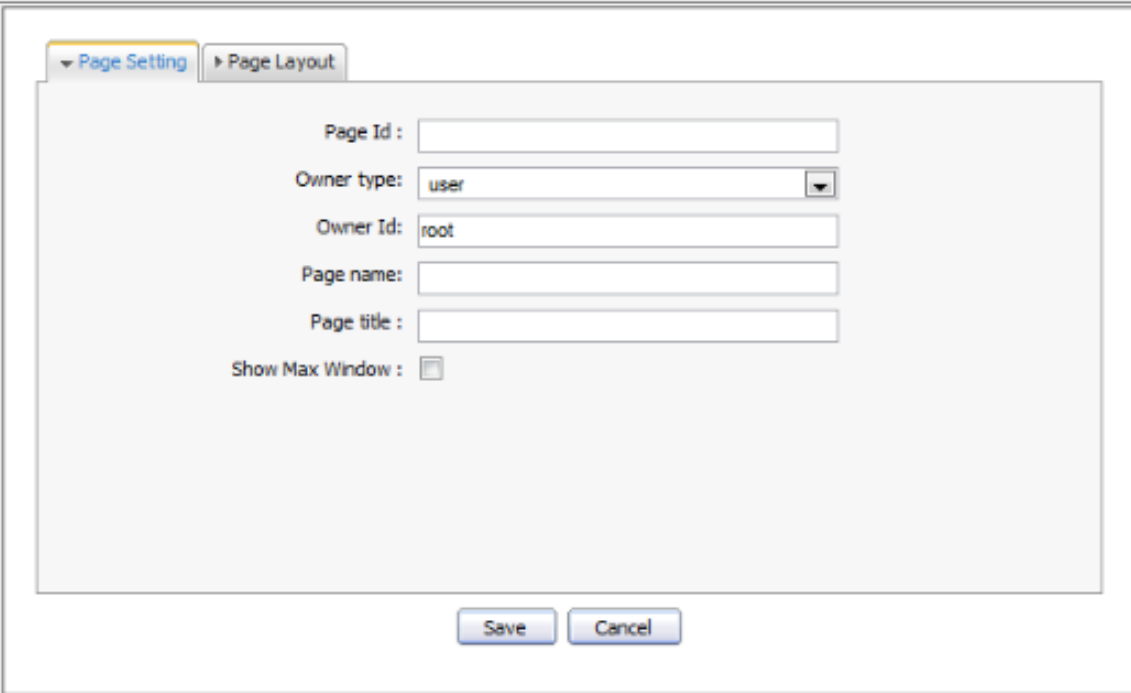
The screenshot displays the 'Administration' section of a web application. At the top, there is a navigation bar with 'Administration' and a dropdown arrow. Below this is a search bar with fields for 'Title', 'Site Name', and 'Type' (set to 'group'). The main area contains a table with the following data:

Page Id	Title	Access Permission	Edit Permission	Action
group::/platform/guests::sitem	Site Map	[*:/platform/guests]	*:/platform/administrators	
group::/organization/management::newstaff	New Staff	[*:/organization/management/]	manager:/organization/management/	
group::/platform/administrator::newaccount	New Account	[manager:/platform/administrator/]	manager:/platform/administrator/	
group::/platform/users::mylink	Blog	[*:/platform/users]	*:/platform/administrators	
group::/platform/guests::link	Link	[*:/platform/guests]	*:/platform/administrators	
group::/organization/management::orgmanagement	Organization Management	[*:/organization/management/]	manager:/organization/management/	
group::/platform/administrator::communitymanagement	Community Management	[manager:/platform/administrator/]	manager:/platform/administrator/	
group::/platform/users::mylink	Red Hat	[*:/platform/users]	*:/platform/administrators	
group::/platform/administrator::registry	Registry	[manager:/platform/administrator/]	manager:/platform/administrator/	

At the bottom of the interface, there is a red-bordered button labeled 'Add New Page'.

2. Click **Add New Page**.

3.



▼ Page Setting   ► Page Layout

Page Id :

Owner type:  ▼

Owner Id:

Page name:

Page title :

Show Max Window : ☐

Save   Cancel

### Page Id

A string that identifies the page. It is automatically generated when you finish creating the page.

### Owner type

If the page **Owner type** is *portal* the page is created for a portal. Therefore only users who have *edit* permissions on the portal level can create this page type.

The name of the current portal is automatically selected for **Owner id** ensuring the edit permissions are assigned to users who can edit the current portal.

If the page **Owner type** is *group* the page is created for a group. Therefore only users who have *manager* permissions for that group can create this page type.

The screenshot shows a 'Page Setting' dialog box with the following fields and controls:

- Page Id :** A text input field.
- Owner type:** A dropdown menu currently showing 'user'.
- Owner Id:** A text input field showing 'root'.
- Page name:** A text input field with an asterisk (\*) indicating it is a required field.
- Page title :** A text input field.
- Show Max Window :** A checkbox that is currently unchecked.
- Buttons:** 'Save' and 'Cancel' buttons at the bottom right.

**Owner Id**

The name of the page owner. When the owner type is set to *group*, a list of groups will allow you to select one user as the 'owner'.

**Page Name**

The name of the page. This is a required field and must be unique. Only alphabetical, numerical and underscore characters are allowed to be used for this field and the name must be at least 3 and no more than 30 characters in length.

**Page title**

The title of the the page. This is an optional field. If you choose to add a title to the page it must be at least 3 and no more than 30 characters in length.

**Show Max Window**

The option allows users to choose whether the page is shown at maximum size or not.

4. Enter values for fields in the **Permission Setting** tab

► Properties

▼ Permission Setting

Permission Setting



Edit Permission Setting

## Current Permission

Group Id : [/platform/administrators](#)

Membership : \*



Delete Permission



Select Permission

Save

Cancel



### Access Permission

The content of this tab is identical to the **Owner type** field in the **Page Setting** tab. Therefore, all users having access rights for the type selected in the **Owner type** field will appear in this tab. But users can also change the value of this tab.

Check the check box if you want to share access with everyone or click the **Add Permission** button to assign permission on group level, then select a group and membership or click the trash can icon to remove a group from the list.

The screenshot shows the 'Access Permission' tab with a sub-tab 'Edit Permission'. Below the tabs is a checkbox labeled 'Make it public(Everyone can access):'. Below this is a table with three columns: 'Group Id', 'Membership Type', and 'Action'. The table contains one row with the values '/customers', '\*', and a trash can icon. Below the table is a button labeled 'Add Permission'.

Group Id	Membership Type	Action
/customers	*	

### Edit Permission

The content of this tab depends on the value of the **Owner type** field in the **Page Setting** tab.

If the **Owner type** is "group", edit permission is assigned to users who are "manager" of the group that is selected in **Owner id**. You can only change this value when editing the page.

The screenshot shows the 'Edit Permission' sub-tab. It displays a box titled 'Current Selected Permission Info' with the following details: Group Id : /customers and Membership : manager.

**Current Selected Permission Info**

Group Id : /customers

Membership : manager

5. Click **Save**.

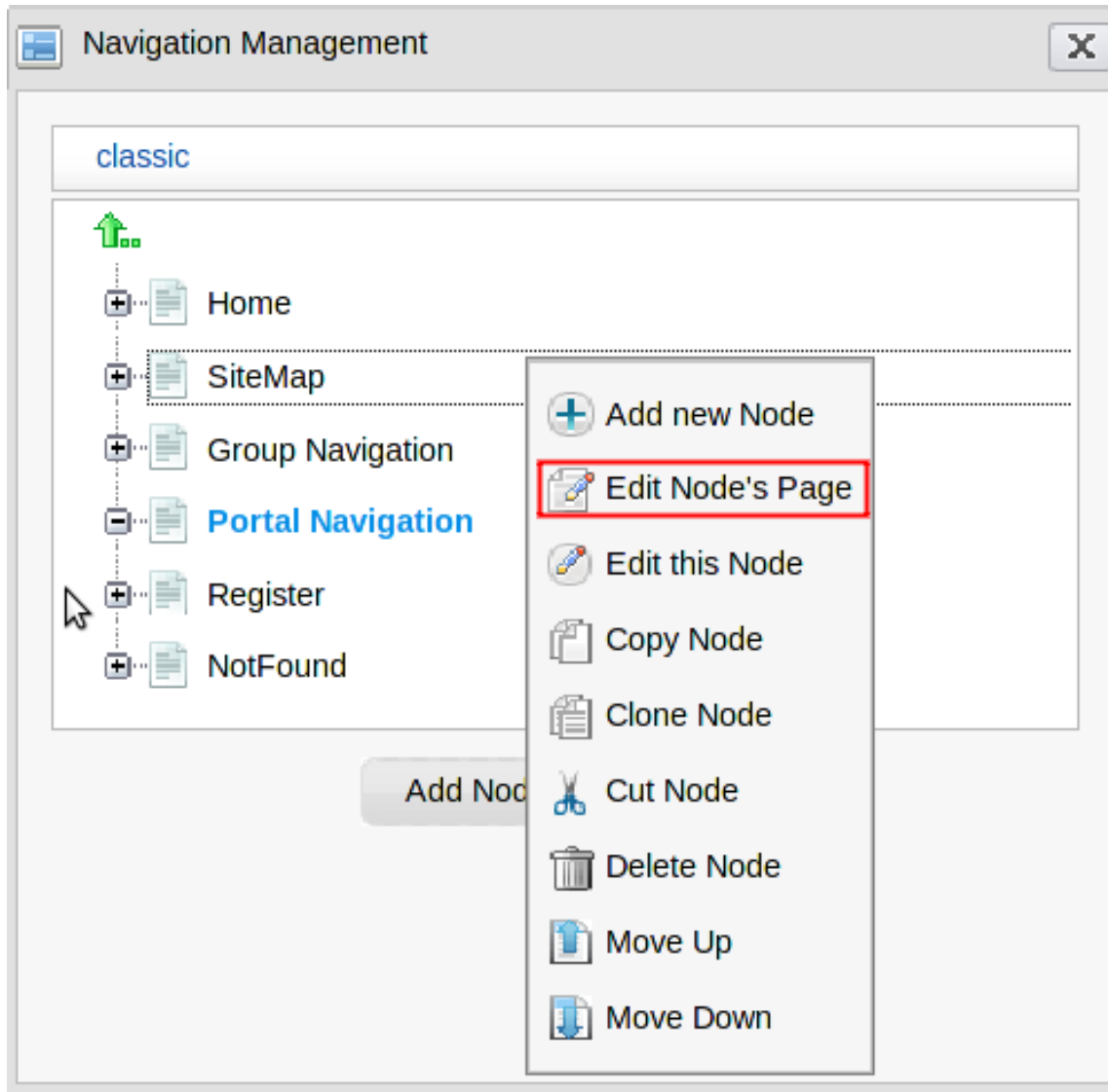
## 4.4.2. Edit a Page

To edit page properties, you have to open **Page Properties** page.

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

**The first way:**

- Open the **Navigation Management** form by doing the steps in [Section 4.2.3.2, “Edit Navigation”](#)
- Right-click your desired node and select Edit Node's Page in the drop-down menu:



**The second way:**

- Mouse over **Group** in the Toolbar. Highlight **Administration** and then click **Page Management**.
- Click the edit icon on the row of page you want to edit in the existing page list.

The edit page will be displayed in the **Page Properties** window:



2. The properties presented in the **Page Properties** window are the same as those outlined in [Section 4.4.1.2, “Adding a new Page using Page Management”](#).

### Permission Setting

This form is supported for pages with *group* or *portal* ownership types. Because a user page is private, no user, other than the creator, can access or edit it.

Permission on each page is set in two levels: **Access right** and **Edit right**.

### Access right

The page **Access right** can be set to specific user groups or set to everyone (this includes unregistered users).

Current access permissions on page are listed and you can remove permissions (by clicking the delete icon) or add further permission (by click the **Add Permission** button).

Populating the **Make it public** check box will allow all users (registered or unregistered) to access the page.

### Edit right

The **Edit right** allows users to change information on a page. **Edit right** only is set for a group of users.

**Edit right** can be set for one specific membership type within a particular group ( \* allows every membership type in a group). If you want to re-assign this right to another group, click **Select Permission** to choose another one.

3. Editing page container layout

Click the Show Container icon to show current container layout of selected page on your right and all the container layouts list on the left pane.

If you want to change the current layout, select a layout type from the list on the left pane, then drag the template you want into the right pane. The new container will be displayed on the right pane.

You can change the position of the current container by dragging it to another place on the right pane or remove it completely by clicking the delete icon in the right corner.

### 4. Editing page portlet layout

Click the Show Portlet icon to show current portlet layout of page.

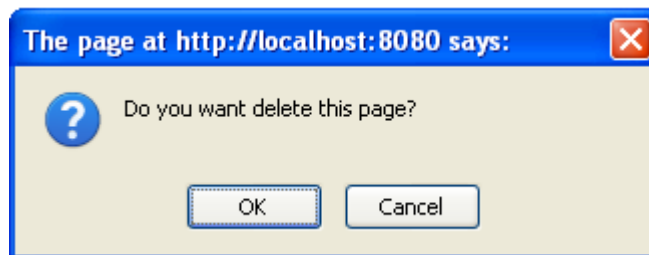
If you want to change the current layout, select a layout type from the list on the left pane, then drag it into the right pane. The new portlet will be added and displayed in the right pane. You can change the position of the current portlet by dragging it to the place you want on the right pane, or remove it completely by clicking the delete icon.

### 4.4.3. View a Page

View any page in the existing pages list by clicking on the **View** icon corresponding to the page you want to view.

### 4.4.4. Delete a Page

1. Go to **Group** in the Toolbar. Highlight **Administration** and then click **Page Management**. You will be presented with a list of all existing pages.
2. Click the trash can icon in the row of the page you want to delete. It will display the confirmation message.

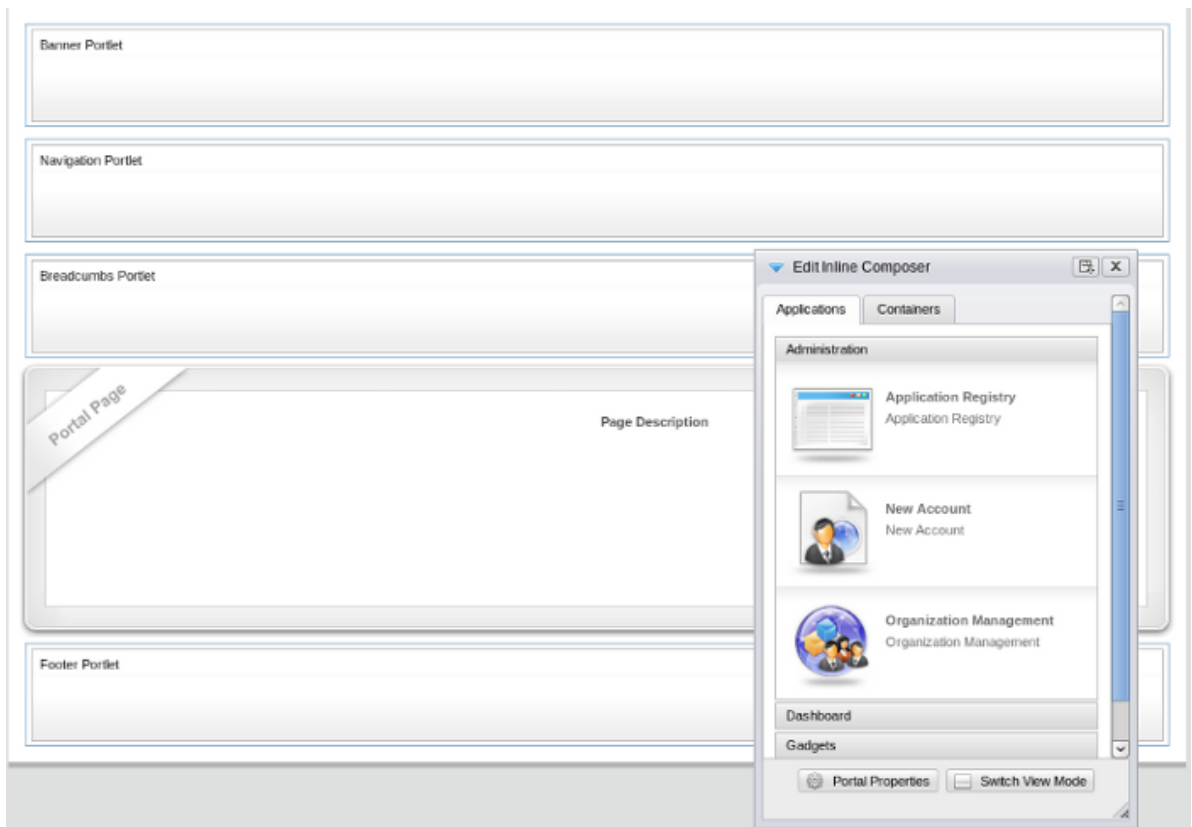


3. Click the **OK** button to complete the deletion or **Cancel** button to quit without deleting the page.

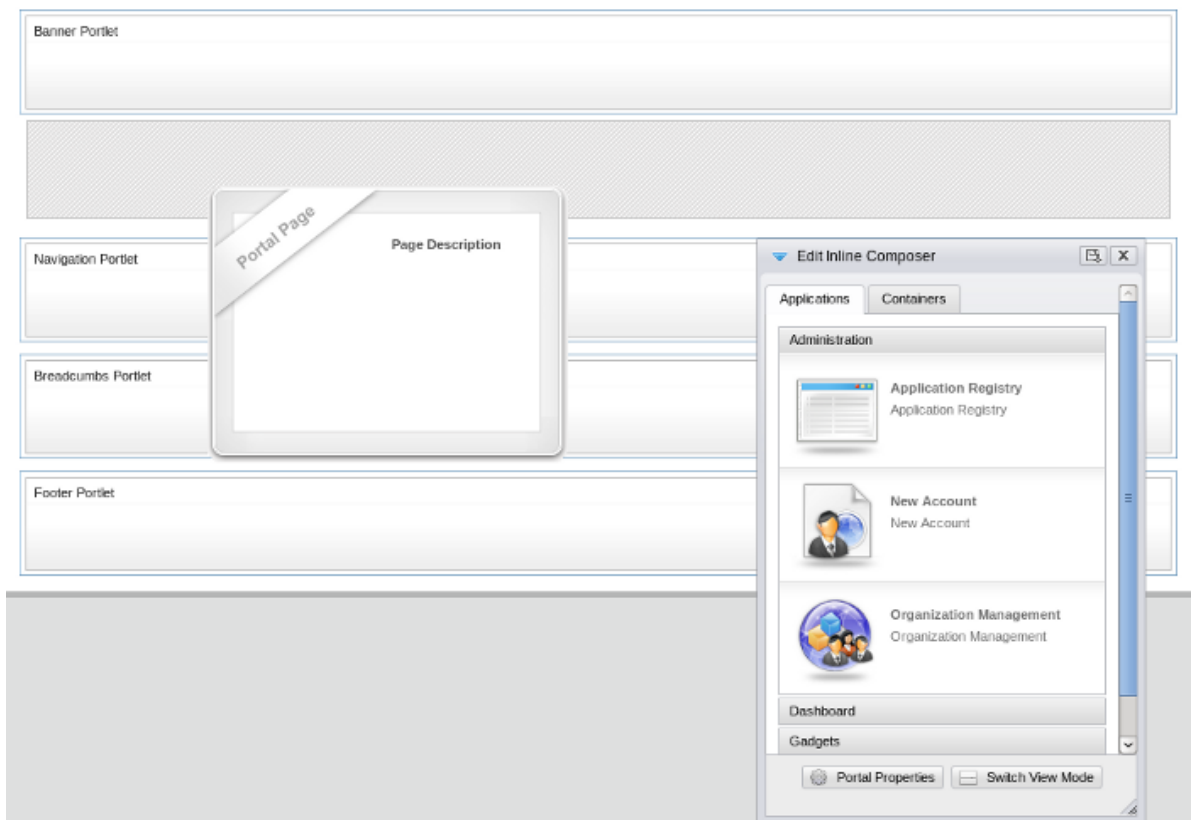
### 4.4.5. Drag and Drop the Page Body

To assist administrators to modify or personalize their portal GateIn 3.2 allows you to easily drag and drop page content within the page.

1. Go to **Site Editor** in the toolbar and click **Edit Layout** It will display:



2. Click the **Portal Page**, drag and drop within the portal page.

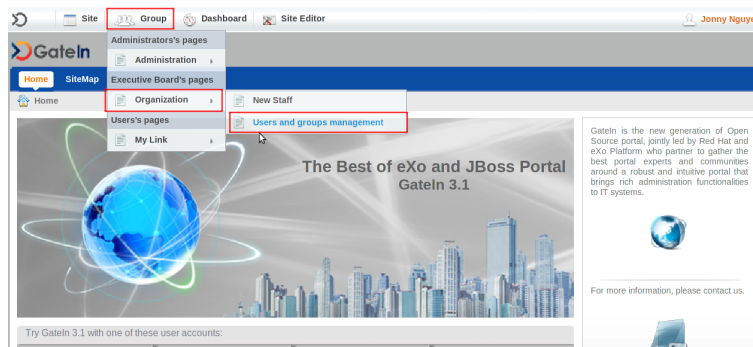


### 4.5. Manage Users and Groups

Several tools are offered to assist Administrators manage users, groups and memberships easily and effectively.

You first need to:

- Mouse-over **Group** in the **Toolbar**.
- Highlight **Organization** and then click **Users and groups management**.



The Organization form will be shown that enables you to manage users, groups and memberships.

#### 4.5.1. Manage users

As an administrator, you can easily find, edit information of user via the **User Management** tab in the **Organization** form. By default, all existing registered users will shown:

User Name	Last Name	First Name	Email	Action
Sonny	Nguyen	Sonny	Sonny@gmail.com	
demo	gtn	Demo	demo@localhost	
john	Anthony	John	john@localhost	
mary	Kelly	Mary	mary@localhost	
root	Nguyen	Jonny	root@localhost.com	
tula	nguyen	root	root@yahoo.com	

Administrators can see all existing registered users and search, edit or even delete them. Each user's groups and memberships (roles) in these groups are also available. You cannot add users to a group but you can remove them from the group.

##### 4.5.1.1. Add a user

To add a new user to the portal user lists follow these steps:

1. Mouse-over **Group** in the **Toolbar**.

2. Highlight **Organization** and then click **New Staff**.

The **New Staff** window will open:

This window has two tabs: **Account Settings** and **User Profile**.

3. To create a new user all of the fields in the **Account Settings** tab must be completed.

Further information about the user (such as nickname and birthday) can be added in the **User Profile** tab. This information is not required for the creation of the account.

4. Click either **Save** or **Reset** to create or discard the new account.

#### 4.5.1.2. Search for users

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

1. Select the information type (name, email, etc) to search against

User Name	Last Name	First Name	Email	Action
demo	exo		demo@localhost	
john	Anthony	John	john@localhost	
marry	Kelly	Marry	marry@localhost	
root	Root	Root	root@localhost	

2. Type in a partial/full string which identifies the user record being searched. Note that wild cards are not supported at this release.
3. Click the magnifying glass icon to begin the search.

#### 4.5.1.3. Edit user information

1. Locate the user you wish to edit.

2. Click the edit icon (next to the trash icon).

The screenshot shows the 'User Management' section of a portal. At the top, there are three tabs: 'User Management', 'Group Management', and 'Membership Management'. Below these, there are three sub-tabs: 'Account Info', 'User Profile', and 'User Membership'. The 'Account Info' tab is selected. The form contains the following fields:

- User Name: demo
- First Name: Demo
- Last Name: gtn
- Email Address: demo@localhost
- Change Password: ☐

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

3. Select the **Account Info** tab to edit the main user information set including first name, last name or email address.

### User Name

The **User Name** field cannot be changed. Other fields **First Name** , **Last Name** , **Email Address** can be changed.

### Change Password

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

4. Select the **User Profile** tab to edit additional information about the user's profile such as the birthdate or the job title as well as some home and business metadata. You may also switch the default display language for that user.
5. Select the **User Membership** tab to see a user's group membership information.



User Name	Group Id	Membership Type	Action
demo	/platform/guests	member	
demo	/platform/users	member	

Save Cancel

### User Membership

The **User Membership** tab displays which group(s) the selected user belongs to. In the above figure, the user "demo" is a member of two groups: "guests" and "users". The parent group of both is "platform".

To remove the user from a group, click the trash can icon.

6. Click the **Save**.

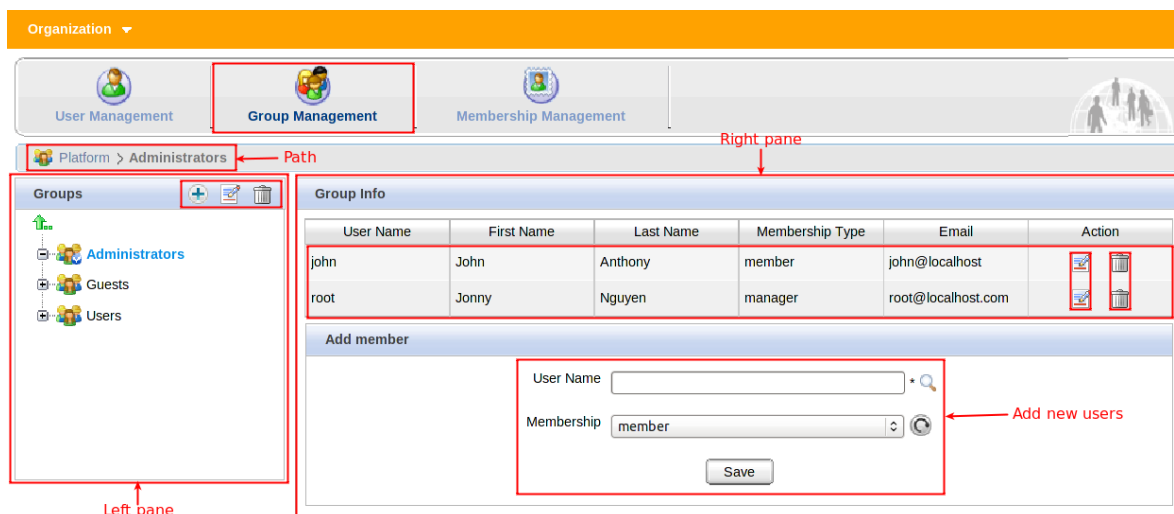
#### 4.5.1.4. Delete a user

1. Locate the user you wish to delete
2. Click the trash icon corresponding to the user who you want to delete in the main User Management form.
3. Click **OK** to confirm.

#### 4.5.2. Manage groups

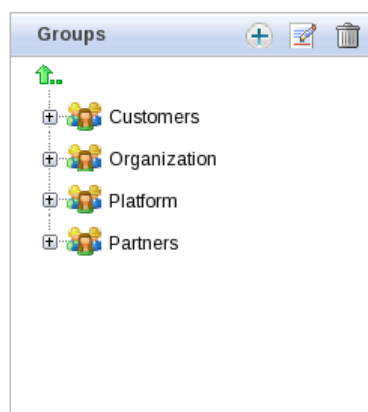
Select the *Group Management* tab in the Organization form. This tab is used to add new, edit or delete a group.

By default, all existing groups will be displayed on the left pane. This tab is used to add new, edit or delete a group. The right pane shows information about the selected group including information about the members in the specific group along with a small form to add a new user to a group.



### 4.5.2.1. Add a New Group

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



2. Click in the left pane. The **Add New Group** form will be displayed on the right pane.

The 'Add New Group' form contains the following fields and controls:

- Group Name**: A text input field with an asterisk (\*) indicating it is required.
- Label**: A text input field.
- Description**: A larger text area for a detailed description.
- Buttons**: 'Save' and 'Cancel' buttons at the bottom.

**Group Name**

The name of the new group. This field is required and any length from 3 to 30 characters is allowed. Once saved this name cannot be edited.

**Label**

The display name of the group. Any length from 3 to 30 characters is allowed.

**Description**

A description of the group. Any length from 3 to 30 characters is allowed.

3. Fill in the required fields. Only letters, numbers and underscore characters are allowed for the **Group Name** field. The name must be unique within the portal.
4. Click **Save**

**Note**

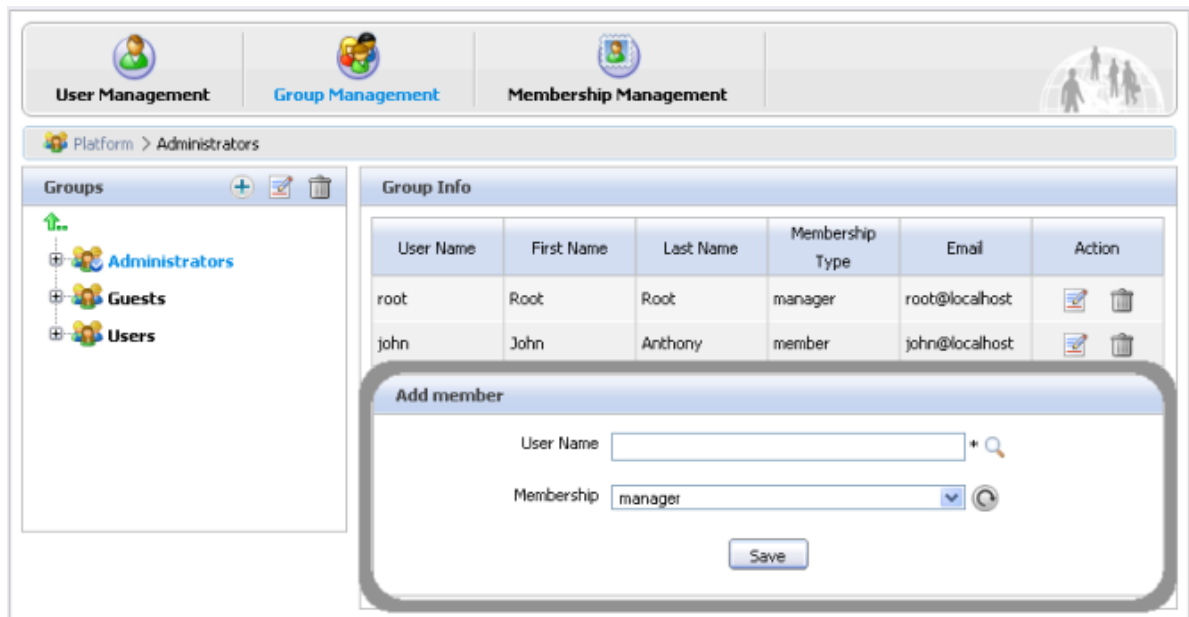
When a new group is added, the group creator will become the manager of that group. The creator's username will be added in the created group with the "manager" membership.

#### 4.5.2.2. Edit a group

1. Find the group in the existing tree and click the label
2. Click the edit icon to display the **Edit Current Group** window.
3. Make the desired changes in the appropriate fields. You can not change the Group Name, however you may change to the **Label** field. You are also able to edit the **Description** field.
4. Click **Save** to accept changes.

#### 4.5.2.3. Add a new user to a group

1. Find the group in the existing tree and click its label. Existing group memberships are listed on the left hand side along with the **Add Member** window.



2. Click the magnify glass to open up the User selector.

Refer to [Section 4.5.1.2, “Search for users”](#) for instructions on how to locate a user.

Check the box next to the user name then click **Add**.

3. Select the membership appropriate for this user. If the desired membership does not appear you may try to click the refresh icon to get the latest list.
4. Click **Save** to accept adding the selected user to a specific group with the selected membership type.

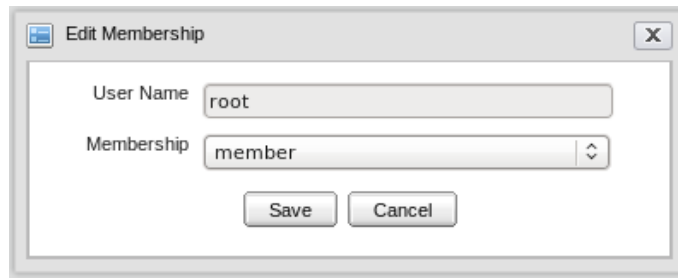


### Note

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

### 4.5.2.4. Edit the user membership in a group

1. Click the edit icon corresponding to a specific user with a membership in the Action column.

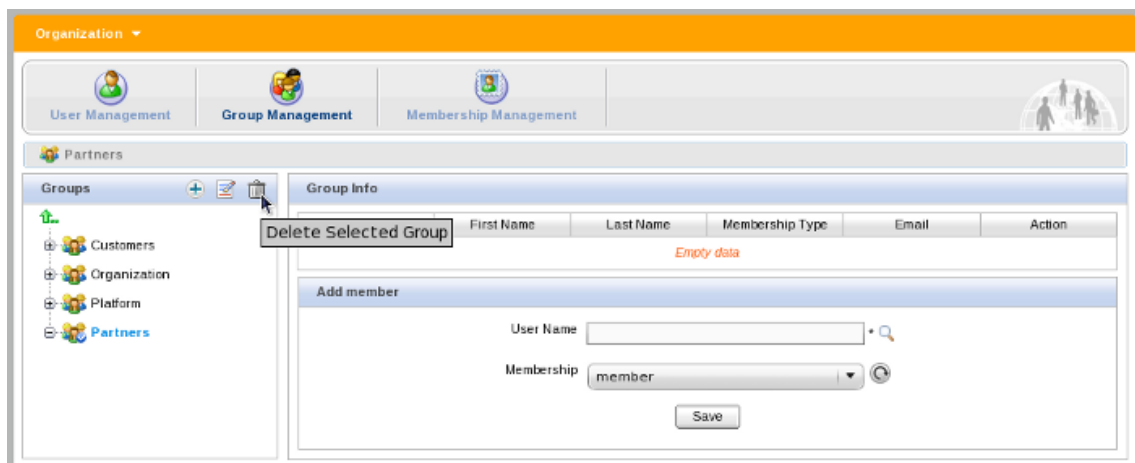


The 'Edit Membership' dialog box contains two input fields: 'User Name' with the value 'root' and 'Membership' with the value 'member'. Below these fields are two buttons: 'Save' and 'Cancel'.

2. Select a membership type in the **Membership** drop-down list.
3. Click **Save** to accept adding a new membership, or **Reset** to clear entered values..

#### 4.5.2.5. Delete a group

1. Find the group in the tree
2. Click the trash icon in the row of the membership type you want to delete..



The 'Group Management' interface shows a sidebar with a tree view containing 'Customers', 'Organization', 'Platform', and 'Partners'. The 'Partners' group is selected. A tooltip 'Delete Selected Group' points to a trash icon. The main area displays 'Group Info' with columns: First Name, Last Name, Membership Type, Email, and Action. Below this is an 'Add member' section with 'User Name' and 'Membership' (set to 'member') fields, and a 'Save' button.

3. Click **OK** .



#### Note

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

### 4.5.3. Manage memberships

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

By default, three membership types are available: *Manager*, *Member* and *Validator*. By definition, *Manager* has got the highest rights in a group.

Membership name	Created date	Modified date	Description	Action
member	10:32:37 2010-11-30	10:32:37 2010-11-30	member membership type	
manager	10:32:37 2010-11-30	10:32:37 2010-11-30	manager membership type	
validator	10:32:37 2010-11-30	10:32:37 2010-11-30	validator membership type	

**Add/Edit Membership**

Membership name  \*

Description

### 4.5.3.1. Add a new membership type

1. In the **Add/Edit Membership** form, enter the values for the membership name field (required) and the description field (optional). Only letters, digits, dots, dashes and underscores are allowed for the membership name.
2. Click the **Save** to accept adding a new membership, or **Reset** to clear entered values.

### 4.5.3.2. Edit a membership type

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

### 4.5.3.3. Delete a membership type

1. Click the trash icon in the Action column.
2. Click **OK**

## 4.6. Manage Page Navigation

Navigation types in GateIn 3.2 are outlined in [Section 2.1.4, "Navigation"](#).

### 4.6.1. Portal's page navigation

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



### Note

- The page navigation of portal is created automatically when a portal is created.
- The navigation will be deleted automatically after you have deleted its portal.

## 4.6.2. User's page navigation

Actions related to the page navigation of users include: Add new pages, Edit page, Edit page layout. These actions are based on permission settings set to a page.



### Note

- The page navigation of a user will be created automatically when the user is created (registered).
- Only the user who is the owner of the user page navigation can edit it.
- No one can create a user page navigation so that no one can delete it. The navigation will be deleted automatically when its user is deleted.

## 4.6.3. Group's page navigation

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

To manage the group's page navigation, click Group on the administration bar.

Group Navigation page will appear:

Group	Edit Navigation	Edit Properties	Delete Navigation
<b>Executive Board</b> Description: the /organization/management /executive-board group	[Edit Navigation]	[Edit Properties]	[Delete Navigation]
<b>Administrators</b> Description: the /platform/administrators group	[Edit Navigation]	[Edit Properties]	[Delete Navigation]
<b>Guests</b> Description: the /platform/guests group	[Edit Navigation]	[Edit Properties]	[Delete Navigation]
<b>Users</b> Description: the /platform/users group	[Edit Navigation]	[Edit Properties]	[Delete Navigation]

[Add Navigation]

### 4.6.3.1. Edit group's page navigation

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

The screenshot shows the 'Navigation Management' window. At the top, there is a text field containing the path '/organization/management/executive-board'. Below this is a tree structure. The root node is 'Organization', which is highlighted with a blue dashed border. It has two child nodes: 'New Staff' and 'Users and groups management'. To the left of the tree is a green upward arrow icon. Below the tree are two buttons: 'Add Node' and 'Save'. A context menu is open over the 'Organization' node, displaying the following options: 'Add new Node', 'Edit Node's Page', 'Edit this Node', 'Copy Node', 'Clone Node', 'Cut Node', 'Delete Node', 'Move Up', and 'Move Down'.

In this form, you can edit the group's page navigation through doing many actions, such as adding a new node to this group, cloning, moving up/down, and more. To learn more about specific actions, refer to [Section 4.3, "Manage Navigation Nodes"](#).

### 4.6.3.2. Create a new page navigation

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

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

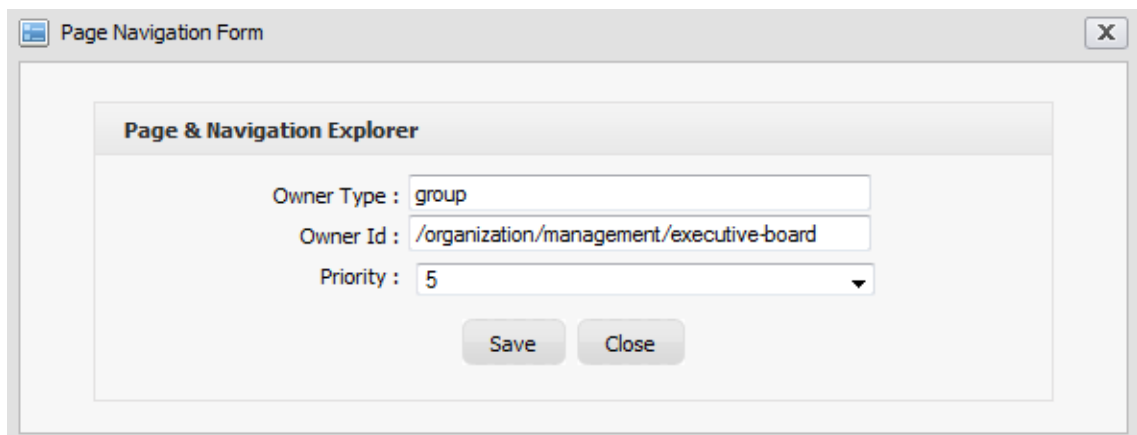


Each group has only one navigation. If you add a new group navigation that has been existing, one alert message will appear to show that you can not create that navigation.

#### 4.6.3.3. Change priority of page's navigation

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

1. Click **Edit Properties** corresponding to the navigation you want to edit. The **Page Navigation Form** enabling you to change the priority of the selected navigation will appear:



2. Select another priority from the available priorities list.
3. Click **Save** to accept changes, or **Close** to quit.

#### 4.6.3.4. Delete a group's navigation

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

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

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

### 4.7. Manage Permissions

Permissions play an important part in accessing and performing actions in the Portal. Depending on these permissions assigned by an administrator, users gain access to various components and actions such as edit portals, pages or portlets.

To manage permissions, you need to learn about the concept mandatory. The mandatory is one of required conditions of system. GatIn provides two types of mandatory, including:

- Mandatory membership type: member.
- Mandatory groups: /platform/administrators, /organization/management/executive-board, /platform/users, /platform/guests. These groups are set by default in eXo Platform.

Details:

- The group **/platform/administrators** contains portal administrators with the highest rights related to the system, such as creating/editing/deleting new portals/pages.
- The group **/organization/management/executive-board** contains administrators having rights related to management of users and groups.
- The group **/platform/users** contains members of the portal. Any registered users automatically become members of this group.

Seeing a page in public means that you can access that page without signing in. To make a page accessible to the public, you have to follow these instructions:

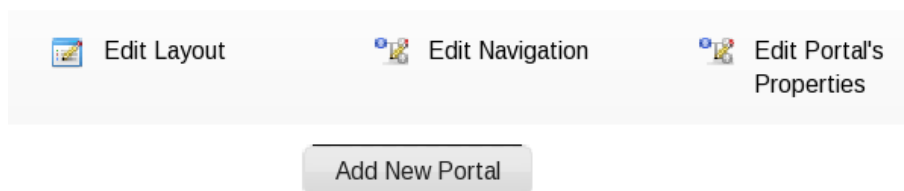
- The current portal in use must be in the public mode (everyone can access).
- The node containing the page that you want to see must belong to the public portal.
- The page which is selected by the node above must be in the public mode.

Details about permission types and levels can also be found in [Section 2.1.7, "Permissions"](#)

### 4.7.1. Set Portal Permissions

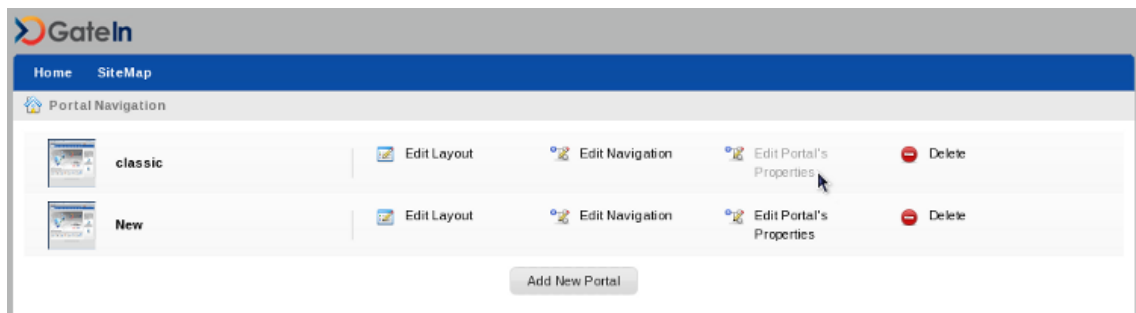
#### New portals

Click **Site** in the Toolbar then click **Add New Portal**. Last select the **Permission Setting** tab.



#### Existing portals

On the Toolbar click **Site** then **Edit Portal's Properties**. Last select the **Permission Setting** tab.



Or hover your cursor over **Site** on the Toolbar and then select your desired portal from the drop-down menu.

- Select **Site Editor**, then **Edit Layout** on the Toolbar.
- Click **Site'Config** the Edit Inline Composer, then select the **Permission Setting** tab.

#### 4.7.1.1. Set Access permissions

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

To set access permissions on a portal, you first need to go to Permission Setting as in the [Section 4.7.1, "Set Portal Permissions"](#) and select the **Access Permission Setting** sub-tab.

Portal Setting Properties **Permission Setting**

**Access Permission Setting** Edit Permission Setting

Make it public (everyone can access): ☐

Group Id	Membership Type	Action
Empty data		

Add Permission

Save Cancel

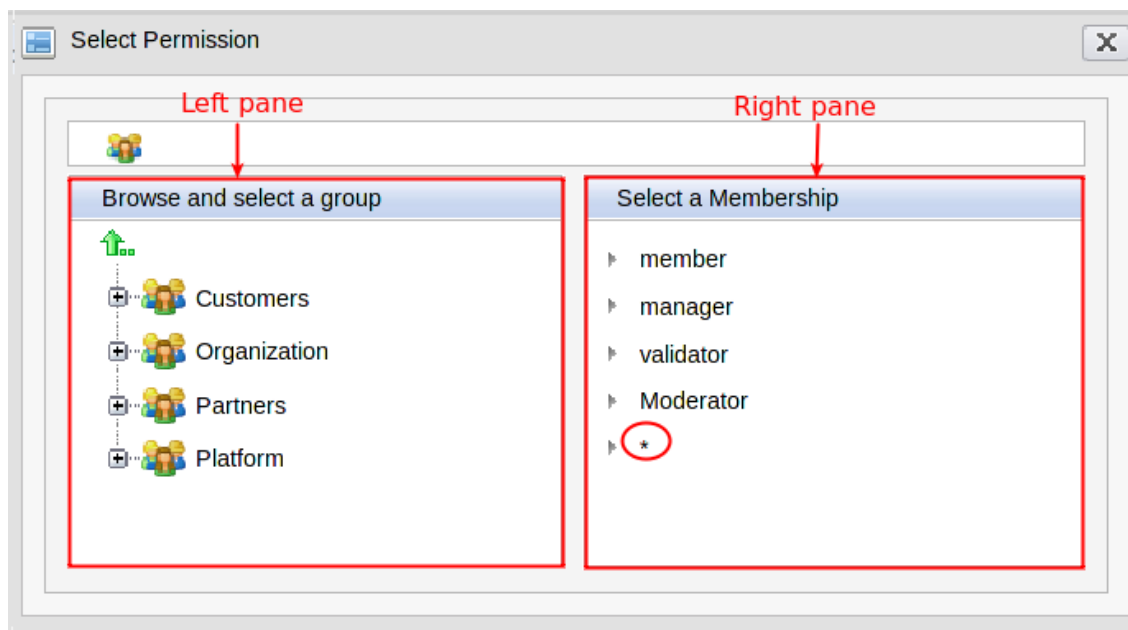


#### Public access

If you do not want your Portal to be publicly accessible, make sure the **Make it public** check box is clear.

If **Make it public** is clear, you need to add permissions by member group as follows.

1. Click **Add Permission**. The **Select Permission** form will appear:



2. Select the group that you want to add on the left pane and then select one membership type on the right pane. In the membership types list, the asterisk (\*) indicates any membership types of the selected group are allowed.

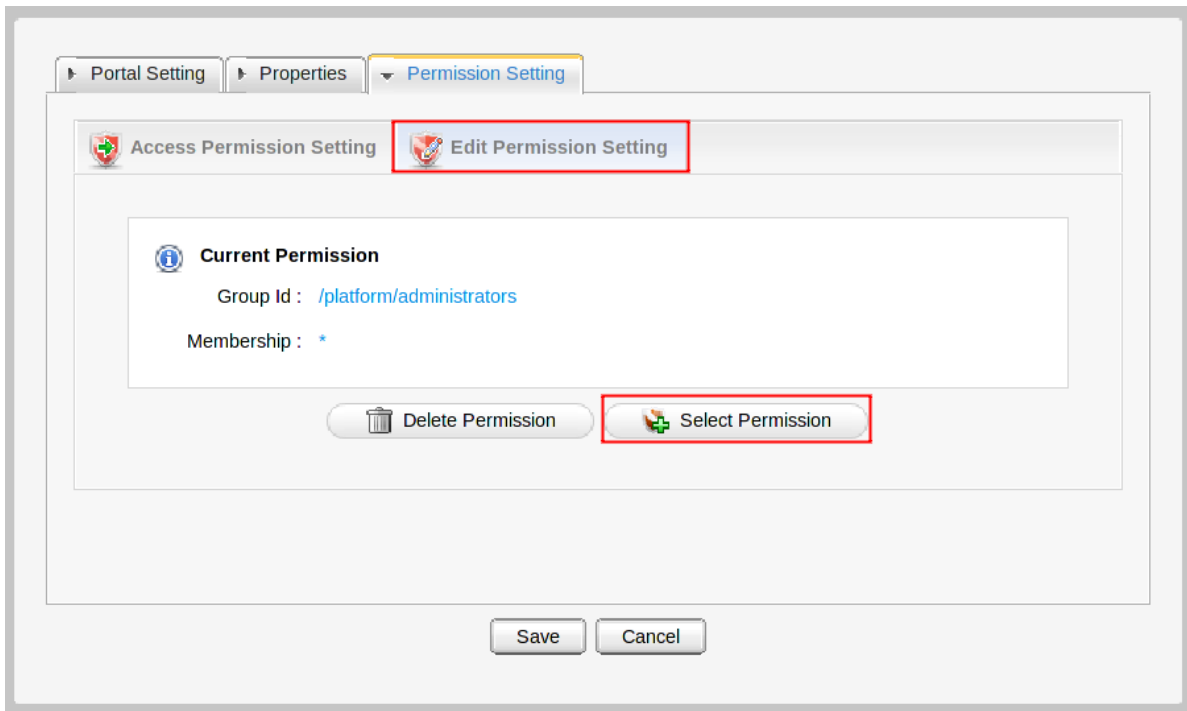
After selecting a membership type, the selected permission is displayed in the access permission list. You can only select one group with one membership type at a time. If you want to add more, click **Add Permission** and select again. Repeat the process for as many permission settings as you require.

### 4.7.1.2. Set Edit Permissions

Only users members of the Editor group can edit that portal. Access rights can be given to several groups but edit rights can only be given to a group with a membership type. To assign an edit permission to a user, you must add him/her to the editor group of the respective portal.

To assign the edit permission on a portal, do as follows:

1. Click **Edit Permission Setting**:



2. Click **Select Permission** to choose a group.
3. Select a group and a membership type from the left and right panes, respectively, of the **Permission Selector** window (select \* if you want to assign all available membership types to the selected group).
4. Click **Save** to accept, or **Cancel** to discard.

## 4.7.2. Set Page Permission

### User

If the Owner type of a page is "user", you don't have to set permissions, no one except the creator has got access and edit permissions.

### Group

If the Owner type of a page is "group", initial permissions on page are:

- Access permission: everyone in that group.
- Edit permission: the manager of that group.

### Portal

If the Owner type of a page is portal, initial permissions are:

- Access permission: users who can access that portal.
- Edit permission: users who can edit that portal.

### 4.7.2.1. Set Access Permission on a Page

1. Open up the page you wish to configure. Select **Site Editor** on the Toolbar and select **Edit Page**.
2. Click **View Page Properties** in the **Page Editor** applet.
3. Click the **Permission Setting** tab.

To be able to access a page users have to be in one of the groups that have access permission to that page. There may be several groups that have access rights to a page. A list of the permissions for that page will be shown (provided the **Make it public** check-box has not been used).

1. Click **Add Permission**
2. Select a group in the left pane then select a membership type.
3. After selecting a membership type, the selected permission is displayed in the access right list. Note that you may associate group and membership only one at a time. To add more access permissions, click the **Add Permission** button and apply the same process again.

If you want to allow any visitors to access the page tick the **Make it public** check-box. Any permission set for that page will be relaxed and the permissions list will disappear.

### 4.7.2.2. Set Edit Permission on a Page

Only users who are in the page's editor group can edit it. The access right can be set for several groups but the *edit* right only can be set for one group. To give a user the edit permission, you must add them to the editors group of that page.

The Permission Setting tab is available in two different ways:

Via Edit Page:

1. Mouse over **Site Editor** on the Toolbar and select **Edit Page**.
2. Click **View Page Properties** in the **Page Editor** applet.
3. Click the **Permission Setting** tab then the **Edit Permission Setting** sub tab.

Via Page Management:

1. Mouse over **Group** on the Toolbar, highlight **Administration** and click **Page Management**.
2. Locate the page you want to edit using the **Page Id** column then click the edit icon (next to the trash icon). You will be taken to the **Page Editor** applet.
3. Click the **Permission Setting** tab then the **Edit Permission Setting** sub tab.

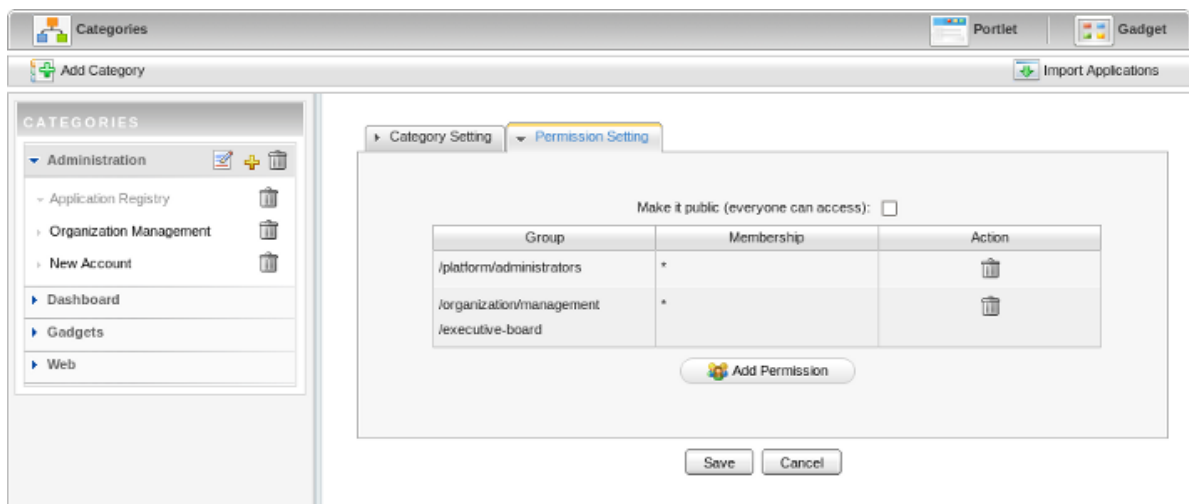
You will see the **Current Permission** listed.

1. Click the **Select Permission** button to set new or change another group.
2. Select a group with a membership type (select \* if you want all membership types in a selected group)
3. After selecting a specific membership from the right, the selected information is displayed.
4. Click the **Save**

### 4.7.3. Set Access Permission on a Category

Setting access permission on a category allows to be able to list those categories when editing a page in order to add portlets or widgets.

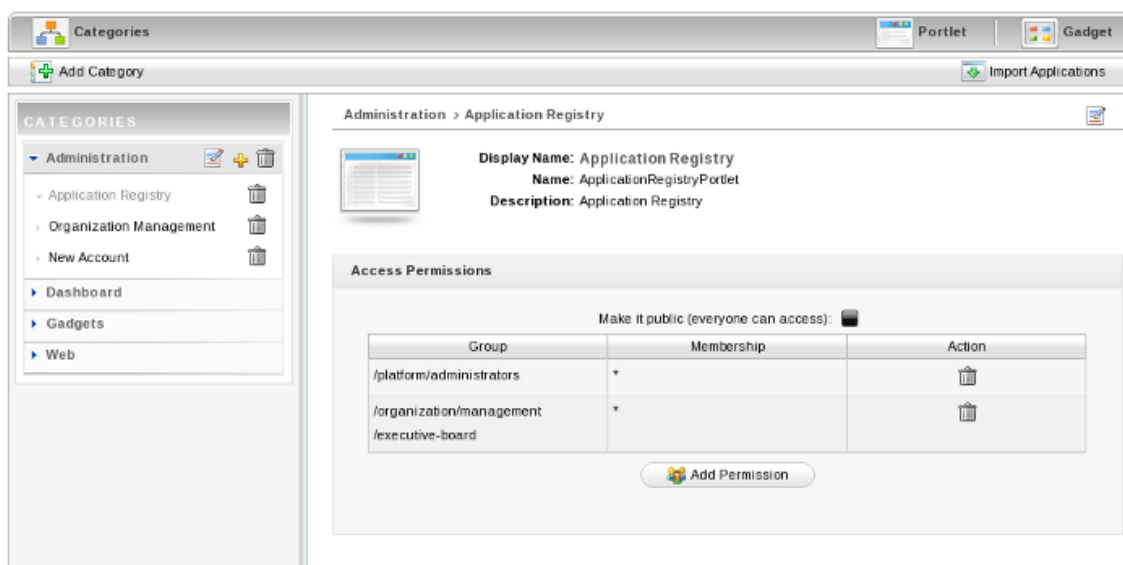
1. Mouse over **Group** on the Toolbar, highlight **Administration** then click **Application Registry**.



2. In the list of categories available in the left pane, click the edit icon, then choose the **Permission Setting** tab.
3. To set permissions for a category:
  1. Click the **Add Permission** button to add access permissions to more groups .
  2. Or select the **Make it public** check box to allow everyone to access.

### 4.7.4. Set Access Permission on a Portlet

1. Select **Group** on the Toolbar. Highlight the **Administration** entry and click **Application Registry**.

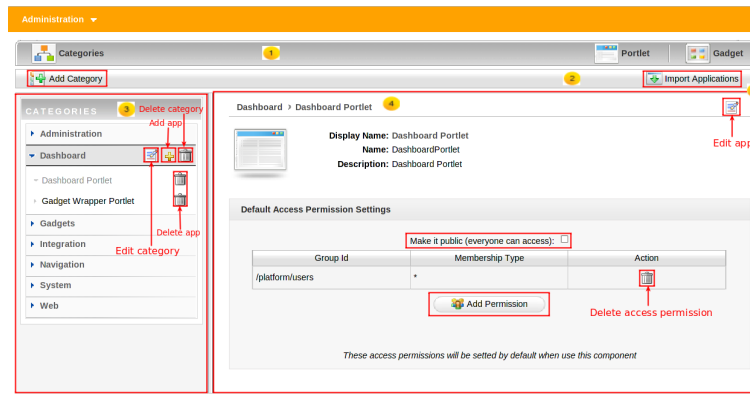


2. Select a category on the left pane that includes the portlet you want to set rights for. Then all portlets of the selected category are listed immediately and detail information of each portlet is displayed on the right pane.
3. To set permissions for a portlet:
  1. Click the **Add Permission** button to add access permissions to more groups .
  2. Or select the **Make it public** check box to allow everyone to access.



# Category, Portlets and Gadgets Administration

To administrate category, portlet and gadget, you first need to go to **Application Registry** by selecting **Group**, then **Administration**, and **Application Registry** on the Toolbar. The form to organize portlets/gadgets into different categories will be displayed as below



Details:

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

## 5.1. Manage Categories

### 5.1.1. Add a new category

1. Click



on the action bar to open the form to add a new category.

Details:

In the **Category Setting** tab:

Category name

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

Display name

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

Description

A brief description of the category. Any length from 0 to 255 characters is allowed.

2. Enter values in the Category Setting tab.
3. Set access permission for your category. Accordingly, another users can only view and use portlets in your category to which they have access.

The screenshot shows the 'Permission Setting' tab selected. At the top, there is a checkbox labeled 'Make it public (everyone can access):'. Below this is a table with three columns: 'Group Id', 'Membership Type', and 'Action'. The table is currently empty, with the text 'Empty data' centered in the first row. Below the table is a button labeled 'Add Permission' with a plus icon. At the bottom of the form are 'Save' and 'Cancel' buttons.

Group Id	Membership Type	Action
Empty data		

For more details about how to set access permission, refer to [Section 4.7, "Manage Permissions"](#).

4. Click **Save** to accept adding a new category to the categories list. Your newly created category will be added to the list in the left pane.

### 5.1.2. Edit a Category

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

### 5.1.3. Delete a Category

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

### 5.1.4. Add Portlets/Gadgets to a Category

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

1. Click



the

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

Choose	Display Name	Description
<input checked="" type="radio"/>	IFrame Portlet	IFrame Portlet
<input type="radio"/>	Navigation Portlet	Navigation Portlet
<input type="radio"/>	Console Portlet	Console Portlet
<input type="radio"/>	WSRPAdminPortlet	WSRPAdminPortlet
<input type="radio"/>	HomePage Portlet	HomePage Portlet
<input type="radio"/>	Footer Portlet	Footer Portlet
<input type="radio"/>	Application Registry	Application Registry
<input type="radio"/>	Breadcrumbs Portlet	Breadcrumbs Portlet
<input type="radio"/>	Site Map Portlet	SiteMap Portlet
<input type="radio"/>	Account Portlet	Account Portlet

Display name

The display name of a portlet/gadget.

Application Type

Either Portlet or Gadget.

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

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

## 5.2. Manage Portlets and Gadgets

### 5.2.1. Import portlets and gadgets

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



### Note

The Application Registry looks in all webapps of your application server for a file located at WEB-INF/portlet.xml and registers the portlets found there. When the user clicks on "Auto Import" the portlets of all webapps are imported. If there is a portlet.xml file in a webapp a new category is created whose name is the webapp war name (or the webapp folder name). All the portlets that are configured in the portlet.xml file are added to the new category.

1. Click



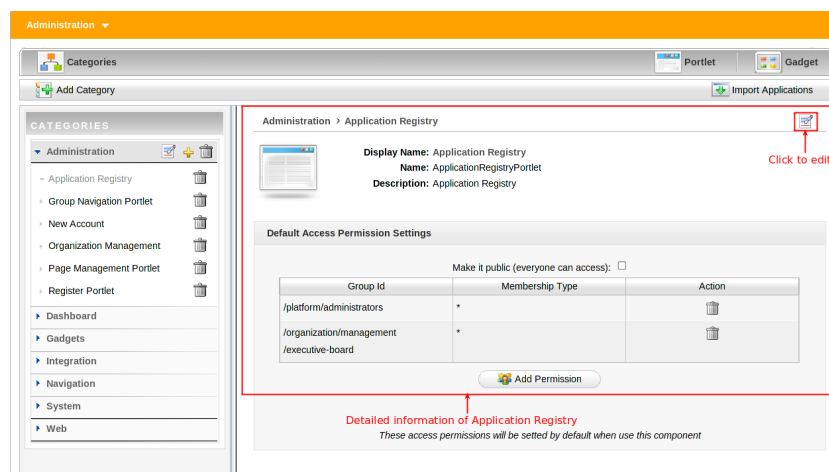
at the right corner on the action bar.

2. Click **OK** to accept importing portlets and gadgets automatically in the confirmation window.

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

### 5.2.2. View/Edit detailed information of portlet/gadget

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



#### Left pane

All portlets and gadgets grouped by categories

#### Right pane

shows detail information about a portlet: Name, Display name, Description and Portlet preferences.

To edit a portlet, click



on the top corner of right pane. The form to edit will appear:

**Edit application information**

Application Name:  \*

Display Name:

Description:

Make changes in fields, except **Application Name**.

### 5.2.3. Display Gadgets

You can change the number of columns available in the Dashboard Portlet.

1. Click **Site Editor**, then select **Edit Page**
2. Click **Edit Portlet** button (which is displayed a pencil icon when you mouse-over the portlet in edit mode). It will show a dialog to change the number of columns to display gadgets.

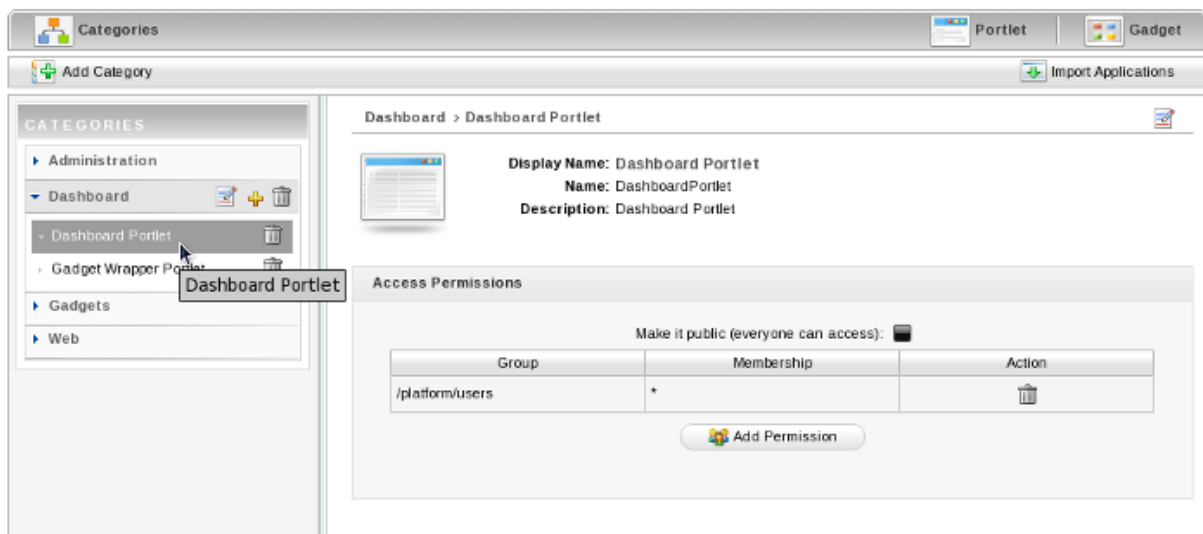
**Edit Mode** | Window Settings | Select Icon | Decoration Themes | Access Permission

Number of columns:

3. Change the number of columns and click the **Save** button to accept the changes.

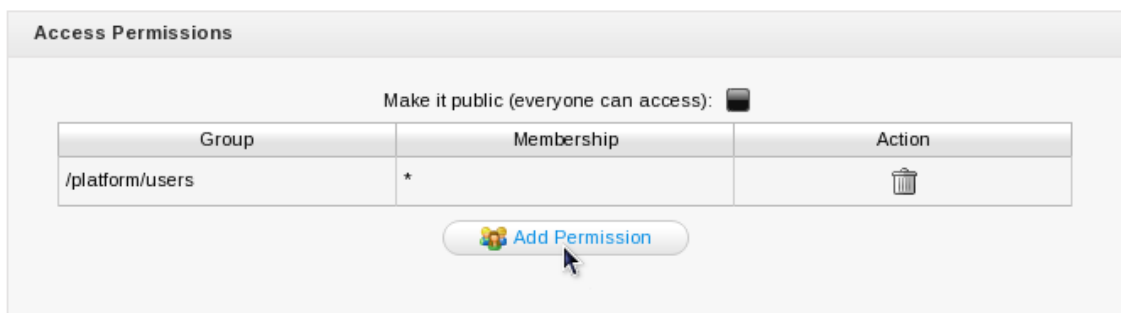
### 5.2.4. Set Access Permission on Portlets

1. In the **Group** menu, select **Administration** and then **Application Registry**.



2. Select a category in the Category pane that includes the portlet you want to set permissions on. All portlets of that category will be listed underneath.
3. To set permission for a portlet:

- Click the **Add Permission** button to add access permissions to more groups.



- Or check **Make it public** to allow everyone to access.

Whenever the user creates or modifies a page, he or she can only see and use gadgets/portlets that fulfill two conditions: the portlet is in a **category** which the user has access permission too and the user has access permission on the **portlet**

### 5.2.5. Edit a specific portlet

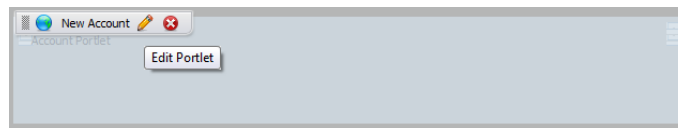
This section tells you how to access the edit mode of a portlet and edit it.

1. Create or edit a page as stated in Section 4.1.3, Edit a portal. In this step, there will be a container that contains and arranges portlets as contents of that page. You can add a portlet to that page by dragging it from the left pane and dropping it into this container space.

2. Open the form to edit a portlet by clicking



at the upper left corner of that portlet:



3. Enter new values that you want to edit in this form, then click **Save** to save new values:

Normally, a portlet has four tabs: Window Setting, Select Icon, Decoration Themes and Access Permission. In addition, some portlets may also have Edit Mode or Preferences. The administrator can change the interface of a portlet by changing values in the Edit Mode tab or in the Preferences Tab.

The Portlet Setting tab includes:

#### Display Name

The display name of portlet.

#### Window Title

The window title with the length between 3 and 60 characters..

#### Width

The portlet's vertical size. The value of this field must be in numeric format.

#### Height

The portlet's horizontal size. The value of this field must be in numeric format.

#### Show Info Bar

The option enables the information bar to be shown or hidden.

#### Show Portlet Mode

The option enables the portlet mode to be shown or hidden.

#### Show Window State

The option enables the portlet's window state to be shown or not.

#### Description

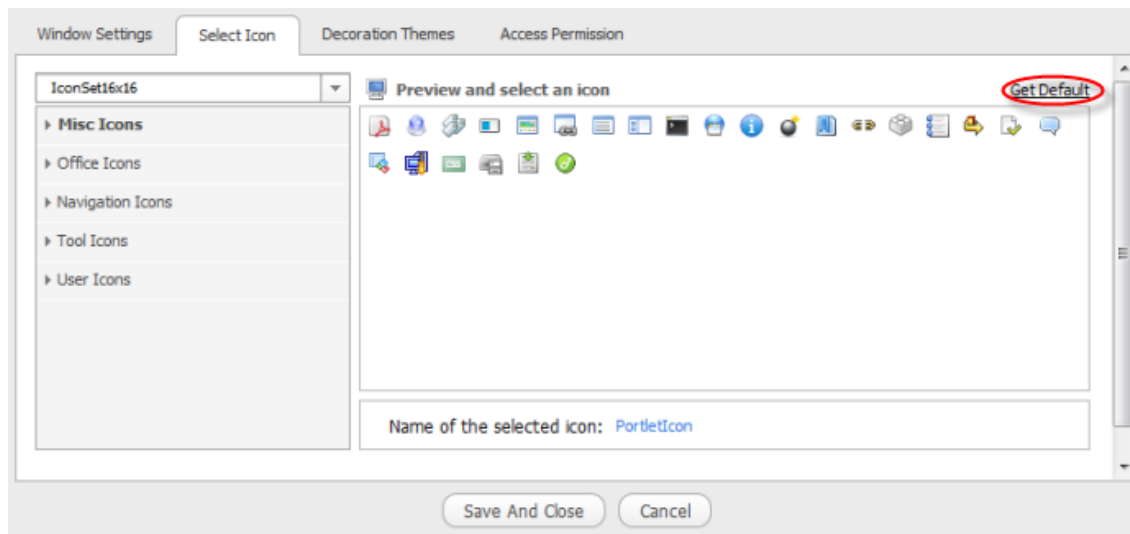
The brief information about the portlet. The length must be between 0 and 255 characters.



#### Note

If Show Info Bar is not checked, portlet mode and window state will not be displayed in that portlet.

The Select Icon tab enables you to select an icon for the portlet. By clicking Get Default, you do not have to choose any icon from the list, the suitable icon will be gotten automatically.



The Decoration Themes tab enables you to select a theme for the portlet from the themes list. By clicking **Get Default**, you do not have to choose any theme, it will be automatically set.

The Access Permission tab enables you to set the access permission on the portlet. The portlet can be made public to everyone or restricted to specific groups. See more details at [Section 4.7, “Manage Permissions”](#).



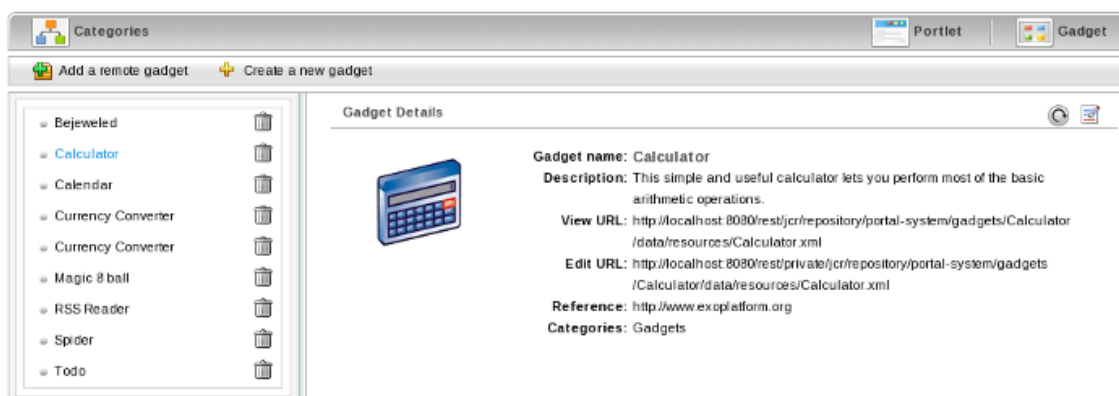
### Note

Some portlets have Edit Mode and Preferences tabs.

The **Mode tab** where administrator can define the interface details.

## 5.2.6. Add a Gadget

In the **Group** menu, select **Administration** then **Application Registry**. Click the **Gadget** icon.

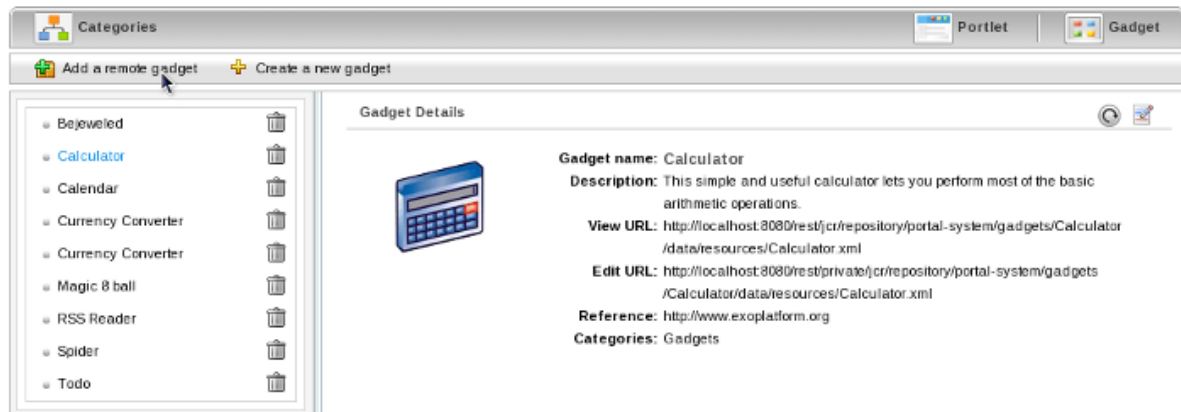




You may add a remote gadget using its URL or create a brand-new one:

## Procedure 5.1. Add a remote Gadget

1. Click **Add a remote gadget**:



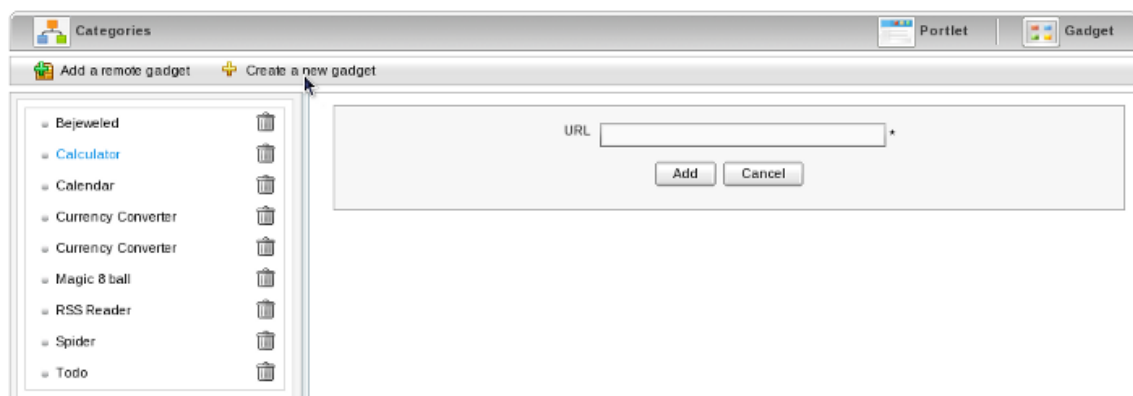
2. Enter the URL of the remote gadget in the **URL** field.

The screenshot shows a form with a label 'URL' followed by a text input field. Below the input field are two buttons: 'Add' and 'Cancel'.

3. Click **Add**. The new remote gadget will be appear in gadget list on left pane of the Dashboard portlet.

## Procedure 5.2. Create a new Gadget

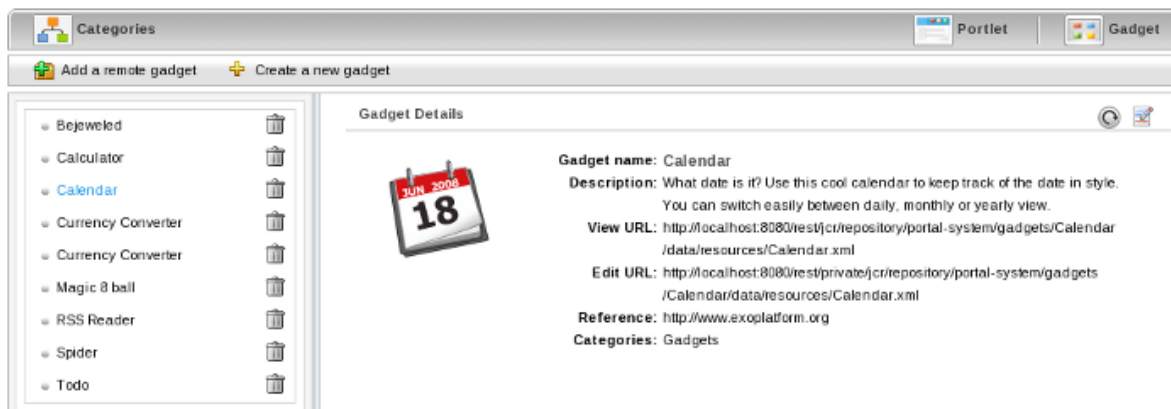
1. Click **Create a new gadget**:



2. Populate the `Source` field with the XML code of the new gadget.

You can edit or refresh a gadget using the icons in the top right of the **Gadget Details** pane.

You can delete a local gadget using the trashcan icon to the right of the appropriate gadget in the gadget list.



### 5.2.7. Add a new Gadget to the Dashboard Portlet

See [Section 3.3.3, "Add Gadgets"](#) for instructions on how to add new gadgets to the dashboard.

### 5.2.8. Edit a Gadget

Click the **Edit Gadget** icon located in the header of the **Gadget Details** page to display the following window:

