Red Hat JBoss Portal 6.2
User Guide

For use with Red Hat JBoss Portal 6.2.

Jared Morgan Aakanksha Singh

Red Hat JBoss Portal 6.2 User Guide

For use with Red Hat JBoss Portal 6.2.

Jared Morgan
Red Hat, Ltd. Customer Content Services

Aakanksha Singh
Red Hat, Ltd. Customer Content Services

Legal Notice

Abstract

This document provides an easy to follow guide to the functions and options available in Red Hat JBoss Portal. It is intended to be accessible and useful to both experienced and novice portal users.

Table of Contents

Preface

1. Document Conventions

This manual uses several conventions to highlight certain words and phrases and draw attention to specific pieces of information.

1.1. Typographic Conventions

Four typographic conventions are used to call attention to specific words and phrases. These conventions, and the circumstances they apply to, are as follows.

`Mono-spaced Bold`

Used to highlight system input, including shell commands, file names and paths. Also used to highlight keys and key combinations. For example:

> To see the contents of the file **`my_next_bestselling_novel`** in your current working directory, enter the **`cat my_next_bestselling_novel`** command at the shell prompt and press **`Enter`** to execute the command.

The above includes a file name, a shell command and a key, all presented in mono-spaced bold and all distinguishable thanks to context.

Key combinations can be distinguished from an individual key by the plus sign that connects each part of a key combination. For example:

> Press **`Enter`** to execute the command.
>
> Press **`Ctrl`**+**`Alt`**+**`F2`** to switch to a virtual terminal.

The first example highlights a particular key to press. The second example highlights a key combination: a set of three keys pressed simultaneously.

If source code is discussed, class names, methods, functions, variable names and returned values mentioned within a paragraph will be presented as above, in **`mono-spaced bold`**. For example:

> File-related classes include **`filesystem`** for file systems, **`file`** for files, and **`dir`** for directories. Each class has its own associated set of permissions.

Proportional Bold

This denotes words or phrases encountered on a system, including application names; dialog-box text; labeled buttons; check-box and radio-button labels; menu titles and submenu titles. For example:

> Choose **System** → **Preferences** → **Mouse** from the main menu bar to launch **Mouse Preferences**. In the **Buttons** tab, select the **Left-handed mouse** check box and click **Close** to switch the primary mouse button from the left to the right (making the mouse suitable for use in the left hand).
>
> To insert a special character into a **gedit** file, choose **Applications** → **Accessories** → **Character Map** from the main menu bar. Next, choose **Search** → **Find…** from the **Character Map** menu bar, type the name of the character in the **Search** field and click **Next**. The character you sought will be highlighted in the

> **`Character Table`**. Double-click this highlighted character to place it in the **`Text to copy`** field and then click the **`Copy`** button. Now switch back to your document and choose **Edit** → **Paste** from the **`gedit`** menu bar.

The above text includes application names; system-wide menu names and items; application-specific menu names; and buttons and text found within a GUI interface, all presented in proportional bold and all distinguishable by context.

`Mono-spaced Bold Italic` or ***Proportional Bold Italic***

Whether mono-spaced bold or proportional bold, the addition of italics indicates replaceable or variable text. Italics denotes text you do not input literally or displayed text that changes depending on circumstance. For example:

> To connect to a remote machine using ssh, type **`ssh`** ***`username@domain.name`*** at a shell prompt. If the remote machine is **`example.com`** and your username on that machine is john, type **`ssh john@example.com`**.
>
> The **`mount -o remount`** ***`file-system`*** command remounts the named file system. For example, to remount the **`/home`** file system, the command is **`mount -o remount /home`**.
>
> To see the version of a currently installed package, use the **`rpm -q`** ***`package`*** command. It will return a result as follows: ***`package-version-release`***.

Note the words in bold italics above: username, domain.name, file-system, package, version and release. Each word is a placeholder, either for text you enter when issuing a command or for text displayed by the system.

Aside from standard usage for presenting the title of a work, italics denotes the first use of a new and important term. For example:

> Publican is a *DocBook* publishing system.

1.2. Pull-quote Conventions

Terminal output and source code listings are set off visually from the surrounding text.

Output sent to a terminal is set in **`mono-spaced roman`** and presented thus:

```
books        Desktop   documentation  drafts  mss    photos   stuff  svn
books_tests  Desktop1  downloads      images  notes  scripts  svgs
```

Source-code listings are also set in **`mono-spaced roman`** but add syntax highlighting as follows:

```
static int kvm_vm_ioctl_deassign_device(struct kvm *kvm,
                 struct kvm_assigned_pci_dev *assigned_dev)
{
         int r = 0;
         struct kvm_assigned_dev_kernel *match;

         mutex_lock(&kvm->lock);

         match = kvm_find_assigned_dev(&kvm->arch.assigned_dev_head,
                                       assigned_dev->assigned_dev_id);
         if (!match) {
                 printk(KERN_INFO "%s: device hasn't been assigned
```

```
before, "
                          "so cannot be deassigned\n", __func__);
                        r = -EINVAL;
                        goto out;
          }

          kvm_deassign_device(kvm, match);

          kvm_free_assigned_device(kvm, match);

out:
          mutex_unlock(&kvm->lock);
          return r;
}
```

1.3. Notes and Warnings

Finally, we use three visual styles to draw attention to information that might otherwise be overlooked.

Note

Notes are tips, shortcuts or alternative approaches to the task at hand. Ignoring a note should have no negative consequences, but you might miss out on a trick that makes your life easier.

Important

Important boxes detail things that are easily missed: configuration changes that only apply to the current session, or services that need restarting before an update will apply. Ignoring a box labeled "Important" will not cause data loss but may cause irritation and frustration.

Warning

Warnings should not be ignored. Ignoring warnings will most likely cause data loss.

2. Getting Help and Giving Feedback

2.1. Do You Need Help?

If you experience difficulty with a procedure described in this documentation, visit the Red Hat Customer Portal at http://access.redhat.com. From the Customer Portal, you can:

- Search or browse through a knowledge base of technical support articles about Red Hat products.
- Submit a support case to Red Hat Global Support Services (GSS).
- Access other product documentation.

Red Hat also hosts a large number of electronic mailing lists for discussion of Red Hat software and technology. You can find a list of publicly available mailing lists at https://www.redhat.com/mailman/listinfo. Click the name of any mailing list to subscribe to that list or to access the list archives.

2.2. We Need Feedback

If you find a typographical error in this manual, or if you have thought of a way to make this manual better, we would love to hear from you. Please submit a report in Bugzilla: http://bugzilla.redhat.com/ against the product Red Hat JBoss Portal.

When submitting a bug report, be sure to mention the manual's identifier: *User_Guide*

If you have a suggestion for improving the documentation, try to be as specific as possible when describing it. If you have found an error, please include the section number and some of the surrounding text so we can find it easily.

Part I. Introduction

Chapter 1. About the Portal

The Red Hat JBoss Portal is the result of two mature Java projects: JBoss Portal and eXo Portal. This community project takes the best of both offerings and incorporates them into a single J2EE deployment archive. The aim is to provide an intuitive user-friendly portal and a framework to address the requirements of today's Web 2.0 applications.

This book introduces and provides detailed information about most features and capabilities of the portal, such as user and group management and access permissions, using portlets, and changing basic interface objects such as skins, language and page orientation.

Report a bug

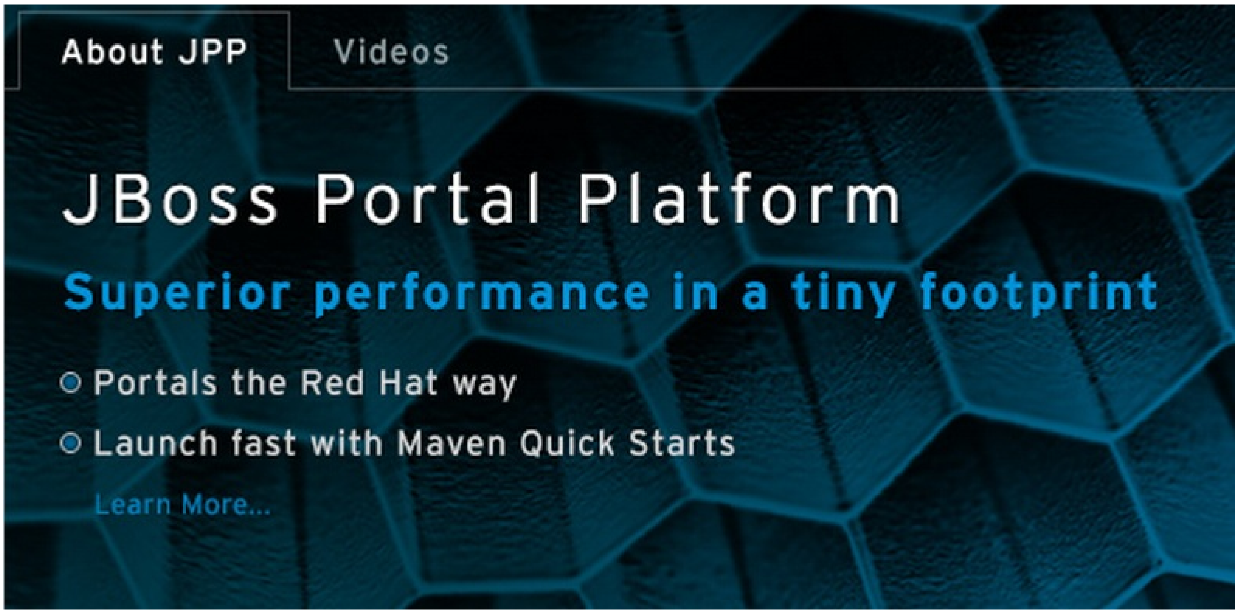
1.1. Related Links

Technical documentation

Other technical documentation, including an *Installation Guide*, a *Development Guide*, and an *Administration and Configuration Guide* can be found at https://access.redhat.com/site/documentation/JBoss_Portal_Platform/

Non-technical documentation

Links to non-technical documents are included on the front page of the portal:



Report a bug

1.2. Product Documentation

The full suite of product documentation is available from the Customer Portal, which is located at http://access.redhat.com/site/documentation/JBoss_Portal_Platform/.

Portal Administrators will find the *Installation Guide* and the *Administration and Configuration Guide* to be invaluable resources for setting up and configuring the portal platform.

Portal, and Web Developers will find the *Development Guide* to be a useful reference document in their day to day development tasks.

Report a bug

1.3. Supported Browsers

For a list of supported browsers, see the Supported Configurations page on the Customer Portal, which is located at https://access.redhat.com/knowledge/articles/119833.

Report a bug

1.4. Accessibility Statement

Red Hat JBoss Portal (JBoss Portal) has improved its design to make sites created with the platform accessible to a wider audience, and to ensure a better experience for all users and technologies.

JBoss Portal 6.1 is a Middleware platform that allows portal developers to deploy and run portal applications. The common and management areas of the portal are modified to be compliant with Section 508 Accessibility guidelines. The enhancements are described in this section.

Developers must ensure portlet applications comply with accessibility guidelines in order for portlets deployed using JBoss Portal to meet Accessibility requirements.

Accessibility Features

Text equivalents

All decorative images have been brought into styles sheets. All images that are part of the HTML code with semantic meaning have text equivalents. Tool tips feature on actions, links, and buttons.

Color

Color is used as a decorative element. Semantic meaning of elements is defined using text descriptions.

Readability

All elements have explicit legends to avoid creating ambiguous semantics. Dynamic elements such as administration menus are modified to be compatible with screen reader software.

Client-side Image Maps

All image maps have suitable alternative text descriptions.

Data Table Headers and Associations

All tables elements have a table summary and column header descriptions to avoid ambiguity for screen readers when interpreting rows and columns.

Iframe Elements

All iframe elements have names and descriptions to avoid ambiguity for screen readers when interpreting content inside the element.

Keyboard Navigation

Dynamic elements such as administration menus have been modified to be keyboard compatible. All buttons and links can be accessed using **TAB** and **ENTER** keys.

Electronic Forms

Form elements have label elements attached with semantic descriptions.

Skip Navigation

For users with alternative input interface requirements, skip navigation is available. Skip navigation allows alternative input interface devices to bypass repetitive navigation links, such as administration menu links or page menu links, enabling users to navigate and interact to page content easier.

Time Delay

Authenticated users can configure the session time expiration, to reduce the need for repeated authentication actions.

Report a bug

Chapter 2. Terminology

2.1. What is a Portal

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

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

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

Report a bug

2.2. What is a 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 with differing content. The Red Hat JBoss Portal has a number of default portlets that can be used in any portal built in the application.

Report a bug

2.3. What is a Portlet Container

A portlet container supplies the runtime environment in which portlets are started, run and ended. While portlet containers can allow portlets to inherit data from the main portal they also provide an environment in which portlets can be independently managed. APIs dictate both how a portal interacts with portlet containers and how portlet containers interact with individual portlets.

Report a bug

2.4. What is the Toolbar

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

The Toolbar also contains the portal *Navigations*, the Menu button (on the far left of the toolbar), and the name of the current user (on the far right).

See Also:

- Section 2.6, “About Navigations”

Report a bug

2.5. What are Gadgets

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

See Also:

- Section 3.4, “Using the Dashboard Workspace”

Report a bug

2.6. About Navigations

Portal navigations are menus that contain links to other parts of a Portal. Navigations can help users to visualize the structure of a site. The default navigation menus are located in the Toolbar.

Portal 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 active, 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 community and application management.

Dashboard

Each user has their 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.

Dashboard Editor

The Dashboard Editor navigation appears when a user is on their dashboard page.

The user can add multiple dashboard in new tabs and then edit the layout and content of those dashboards.

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 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.

See Also:

- Section 2.4, “What is the Toolbar”

Report a bug

2.7. About 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 to a group.

Private

This mode is for registered users only. Users set a user name 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 links, and change the site language to suit their individual preference.

Report a bug

2.8. About Permissions

Permission settings control what operations users can perform within the portal, and are set by portal administrators. Depending on these permissions assigned by an administrator, users gain access to various components and actions such as edit portals, pages or portlets.

There are four types of permissions.

- Access Permissions
- Edit Permissions
- Move Apps Permissions
- Move Containers Permissions

See Also:

- Section 11.1, “Manage Permissions”
- Section 9.1, “Add a New Page using the Page Creation Wizard”

Report a bug

2.8.1. Access Permissions

Access Permissions allow users to view portal objects through the User Interface. This permission can be granted to multiple user groups.

Report a bug

2.8.2. Edit Permissions

Edit Permissions allow users to change properties of objects in the portal. For example, users can change the title or name of a page, select a default skin or locale for a site, or change the visual layout of the portal object using the Page or Site Composer.

The ability to edit portal object parameters is governed by the Edit permission on the object itself. For example, if the Edit permission of a page is set to the ***/organization/management/executive-board*** group, any members of the Executive Board can change the Access and Edit permission of the given page.

> **Note**
>
> Only one group can have edit permissions for an object at a time.

Report a bug

2.8.3. Move Apps and Move Containers Permissions

Red Hat JBoss Portal 6.1 allows to set user permissions to modify the child objects of a Site, Page or Container. The term Container refers to a box in the user Interface that allows rendering child objects as per rows, columns, tabs, and so on.

There are separate permissions for Applications and Containers.

> **Example 2.1. Use of Move Apps and Move Containers Permission**
>
> Move Apps and Move Containers Permissions are useful when a portal owner wants to minimize the risk of breaking the page layout while users modify Pages. To mitigate this risk, the Portal administrator can create a Page template with containers and restrict the user permissions as follows:
>
> - Set Move Containers Permissions on the Page and all the Containers in the page to a group. For example, group is ***/organization/marketing/content-strategy***.
> - Set Move Apps Permissions on the Page and all the Containers in to page to **Nobody**.
> - Browse to the folder designated for adding applications in the Container hierarchy and set Move Apps Permissions to the group ***/organization/marketing/content***
>
> The members of **/organization/marketing/content** group can create pages with the predefined layout and add Applications to the locations designated by the template creator.

See Also:

- Section 9.1, “Add a New Page using the Page Creation Wizard”

Report a bug

2.8.4. Move Apps Permission

Move Apps Permissions allows users to perform the following operations with child Applications, of the given Site, Page or Container in Page or Site editors.

- Add an Application as a child to the given Site, Page, or Container.
- Reorder child Applications of the given Site, Page, or Container.
- Remove a child Application from the given Site, Page, or Container.

Report a bug

2.8.5. Move Containers Permission

Move Containers Permissions allow users to perform the following operations with child Containers of the given Site, Page or Container in Page or Site editors.

- Add a Container as a child to the given Site, Page, or Container.
- Reorder child Containers of the given Site, Page, or Container.
- Remove a child Container from the given Site, Page, or Container.

Report a bug

Chapter 3. Elements of the Portal

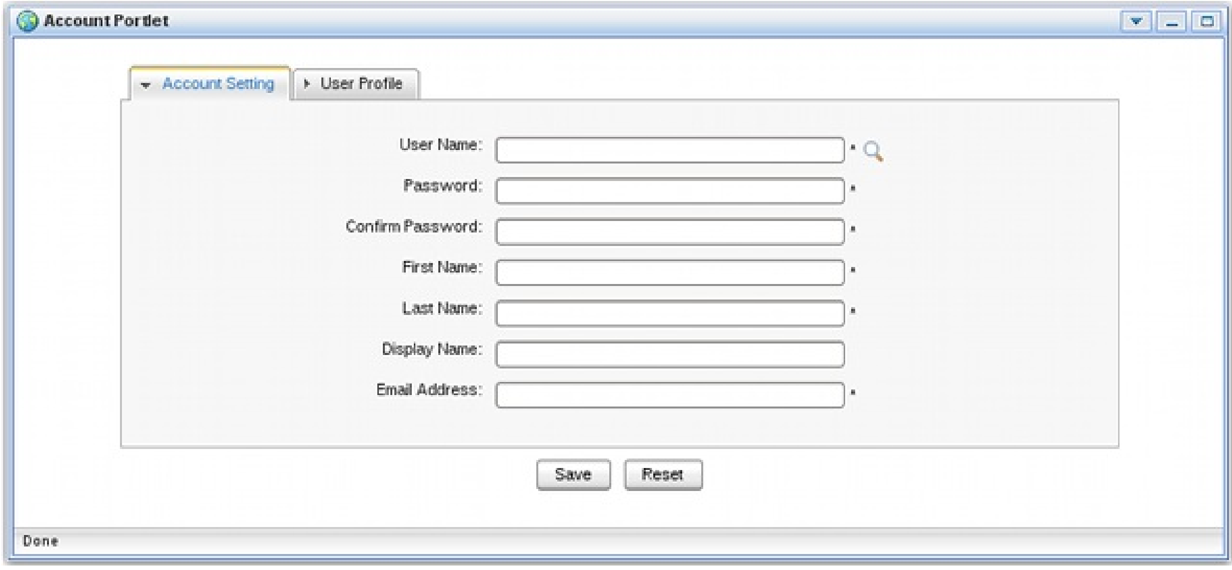
3.1. Functional Portlets

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 undertaking portal tasks.

Default Portlets

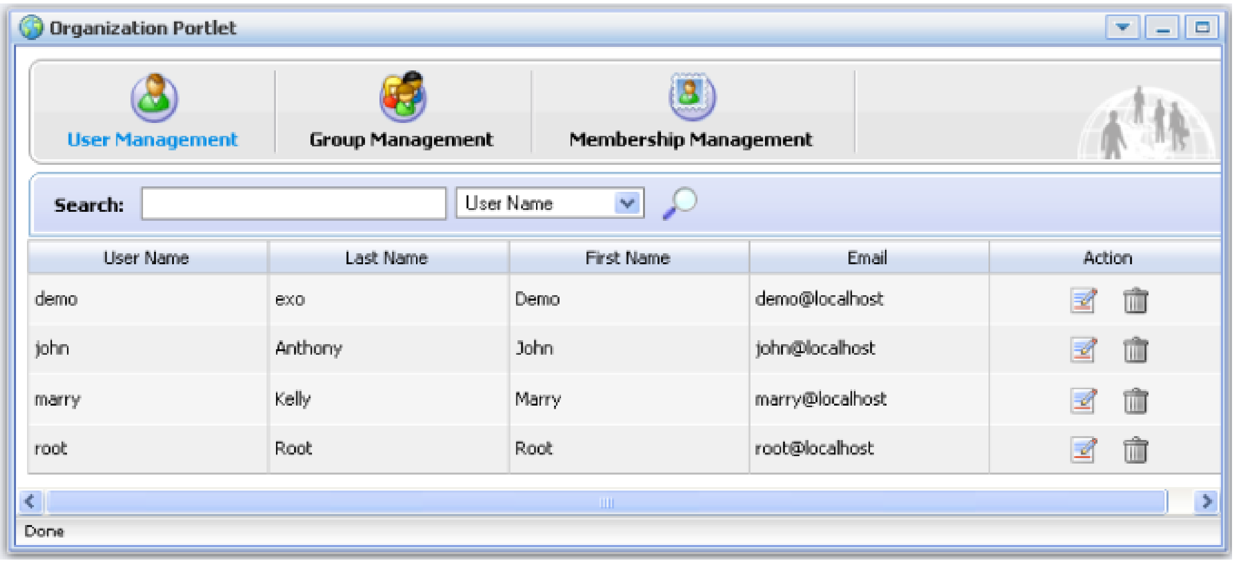
Account Portlet

The **`Account Portlet`** allows users to register a new account and choose a preferred language for the Portal interface.



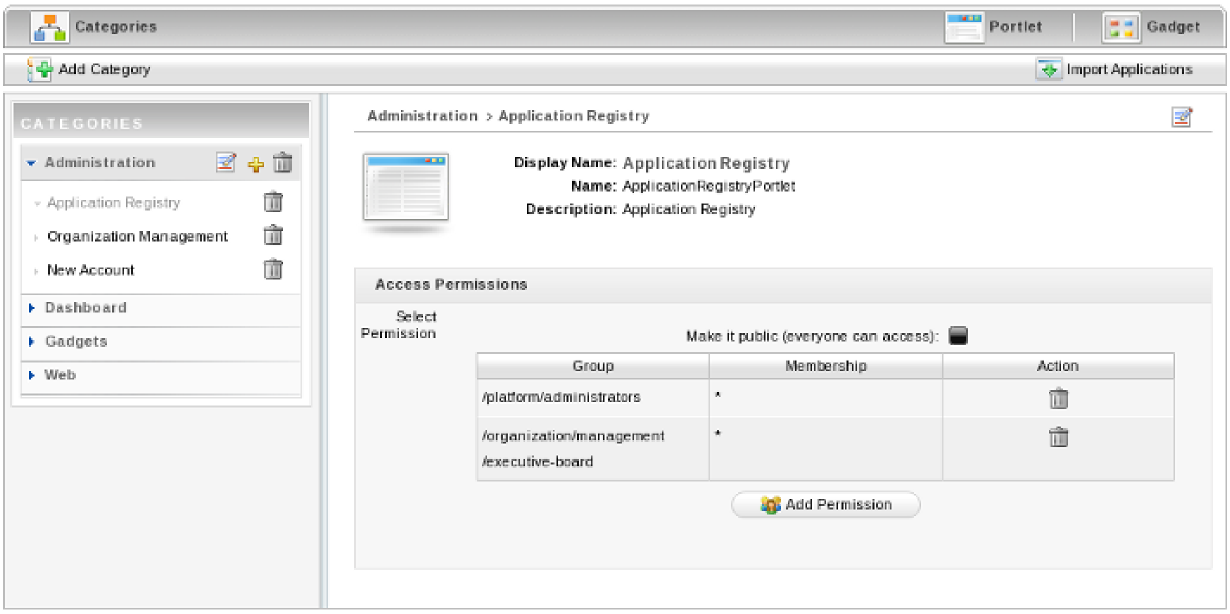
Organization Portlet

The **`Organization Portlet`** is used to manage user information, groups of users and groups memberships.



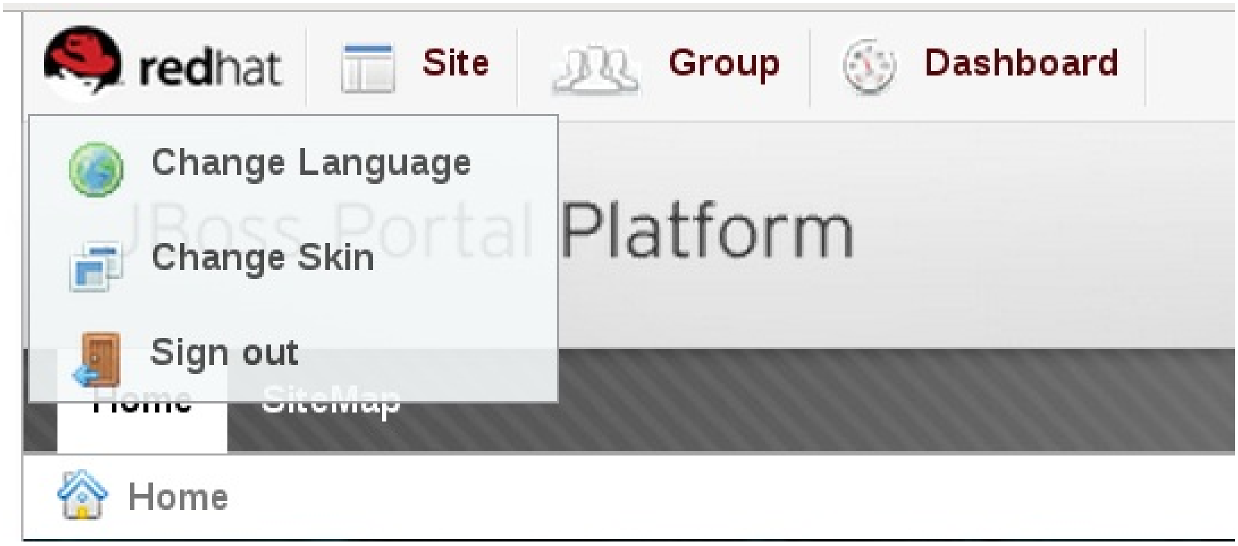
Application Registry Portlet

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



Start Toolbar Portlet

The **`Start Toolbar Portlet`** allows you to change the default language, the skin of the portal or to sign out.



Report a bug

3.2. Interface Portlets

The Interface Portlets are the client-side components of the portal. They provide ways for users to interact with the portal. The portal provides the following Interface Portlets:

Default Interface Portlets

Homepage Portlet

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

Banner Portlet

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

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.

Sitemap Portlet

This Portlet displays a site map page of a web site. It lists pages on a website, typically organized in hierarchical fashion.

Breadcrumbs Portlet

This Portlet displays the navigation path the user has taken from the home page to arrive at the current page.

Dashboard Portlet

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

IFrame Portlet

This Portlet is used to create in-line 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, embedded data is displayed inside a window within the browser window.

Gadget Wrapper Portlet

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

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.

See Also:

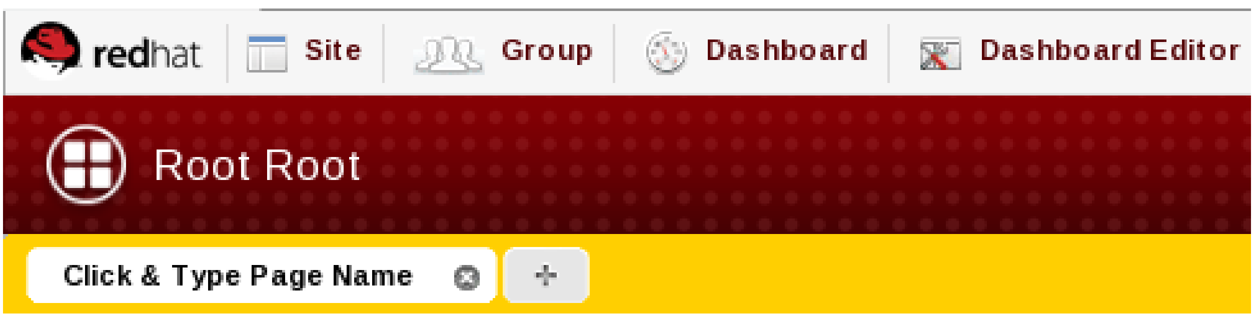
- Section 3.3, “The Dashboard”
- Section 6.1, “Import Portlets and Gadgets”

Report a bug

3.3. The Dashboard

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

The active Dashboard can be individually named by double clicking on the default name ("*Click and Type Page Name*") and entering a new name:



The Dashboard can also be tabbed to create multiple spaces. Open a new tab by clicking the **+** button beside the Dashboard name.

New tabs can also be individually named and managed.

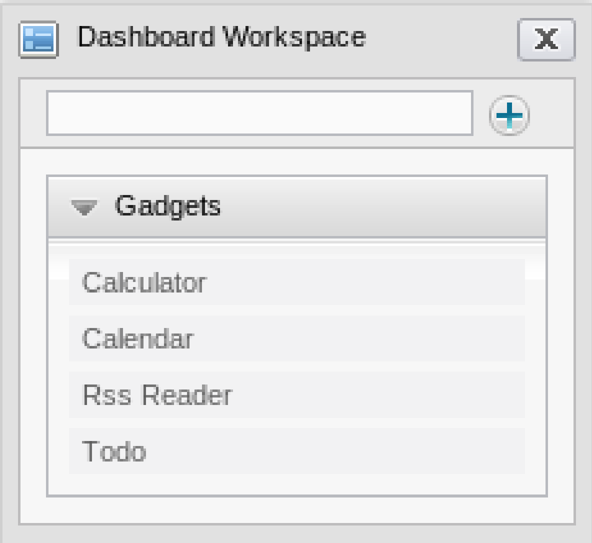
Gadgets within the Dashboard can be moved and rearranged. New gadgets can be created and unnecessary ones deleted. More than one instance of the same gadget can be opened at the same time and each instance of the same gadget can have different settings. The gadgets instances are completely independent.

Report a bug

3.4. Using the Dashboard Workspace

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

The Dashboard Workspace lists all available gadgets. The following gadgets are provided by default.



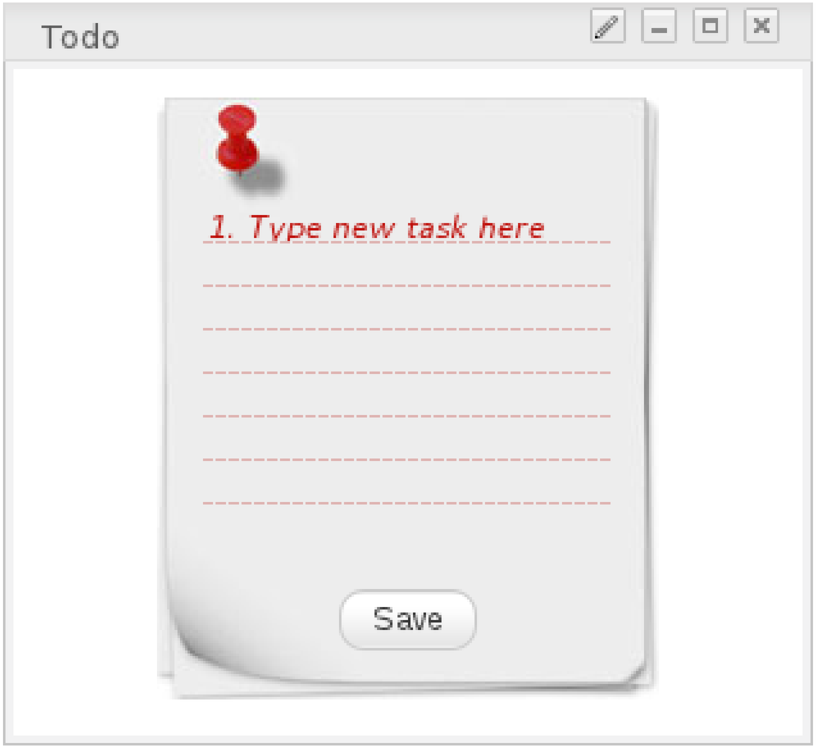
Default Gadgets

Calendar

The calendar gadget helps track and plan your events and activities.

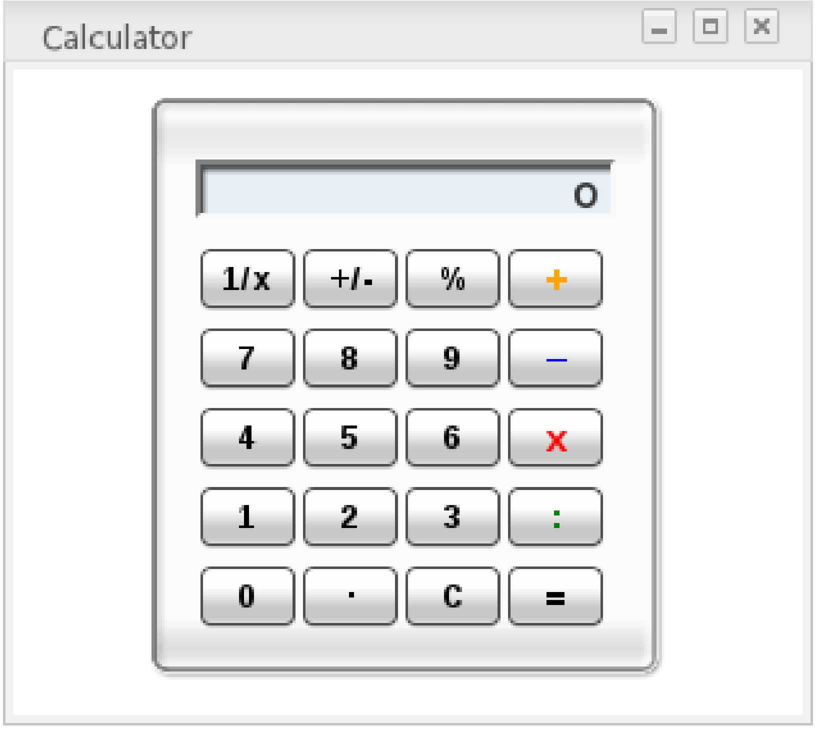
Todo

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.



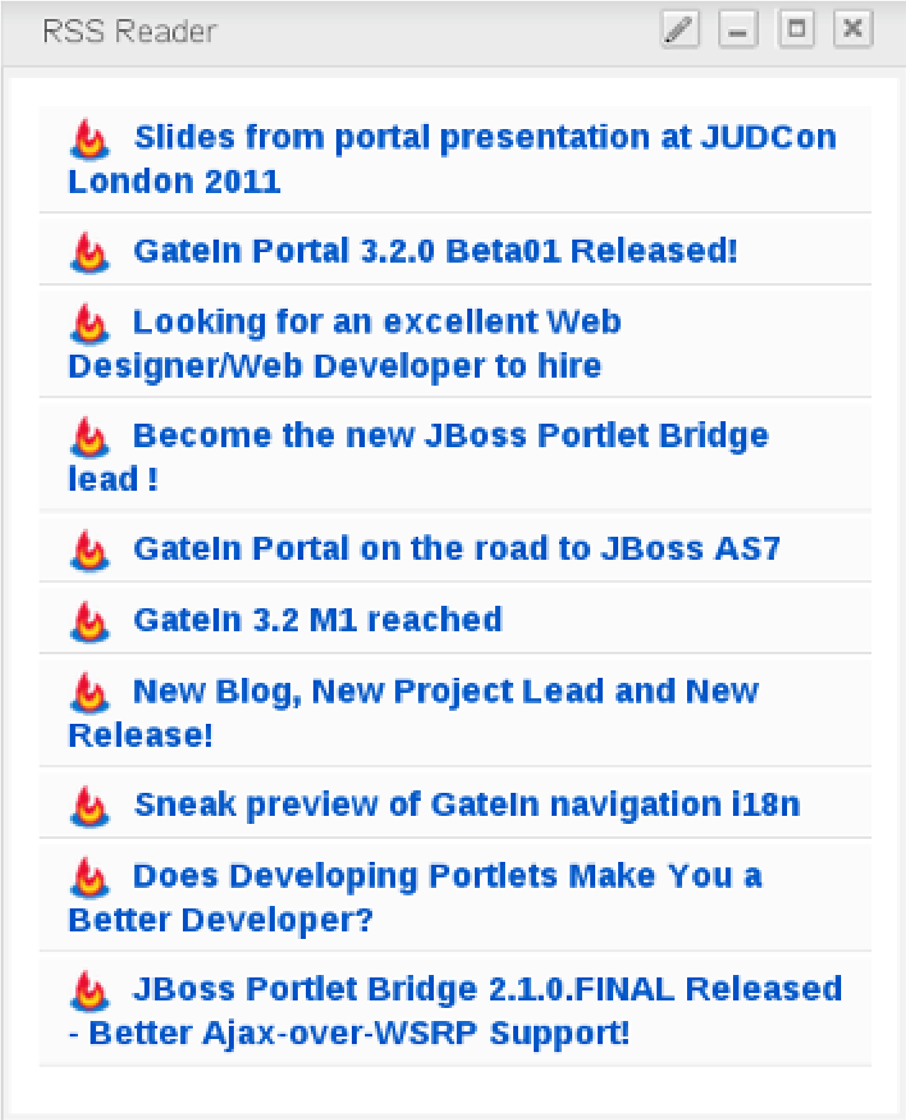
Calculator

This 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 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.



To use one of the default gadgets, drag it from the Dashboard Workspace onto your Dashboard.

Report a bug

3.5. Add Gadgets

Many more gadgets can be found at the Google Gadgets homepage, located at http://www.google.com/ig/directory?synd=open. Many of the gadgets available from this resource are compatible with the portal.

> **Important**
>
> Only gadgets that have been added to the whitelist by the administrator can be used. To configure the whitelist, see the *Gadget Proxy Configuration* Chapter of the *Installation Guide*.

Procedure 3.1. Add 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 from the Google Gadget homepage provide a link to View source. Clicking on this link will open a page showing the gadget's XML source. Use the URL of this page in the Dashboard Workspace, which ends with **.xml**. For example, http://www.donalobrien.net/apps/google/currency.xml

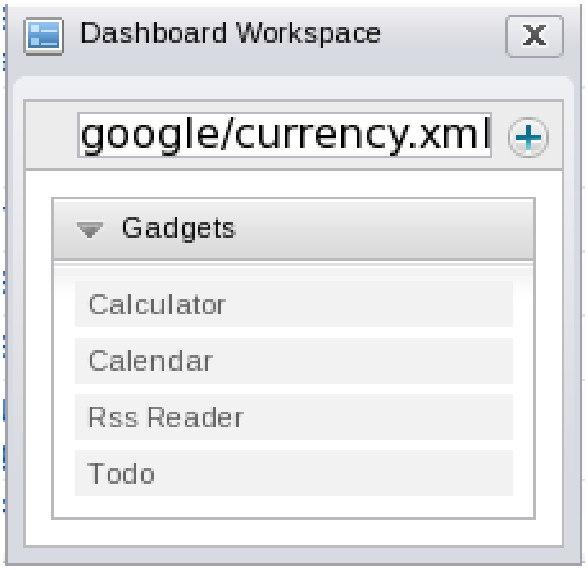
> **Note**
>
> Remote gadgets can be only created using an .xml link or RSS URL. If you use a link that generates an RSS feed (for example, http://feeds.feedburner.com/gatein), a new RSS reader gadget is created automatically even if the URL does not end with **.rss**.

2. Return to the portal and click **Dashboard** in the toolbar.

3. Click on **Add Gadgets** in the Dashboard to open the Dashboard Workspace.

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 **+** button to add the new gadget to the page.

   The new gadget will appear on the Dashboard alongside any other gadgets already in use. If required, the new gadget can be dragged to another position on the page.

Report a bug

Chapter 4. Toolbar

4.1. What is the Toolbar

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

Report a bug

4.2. User Actions in the Toolbar

User Menu

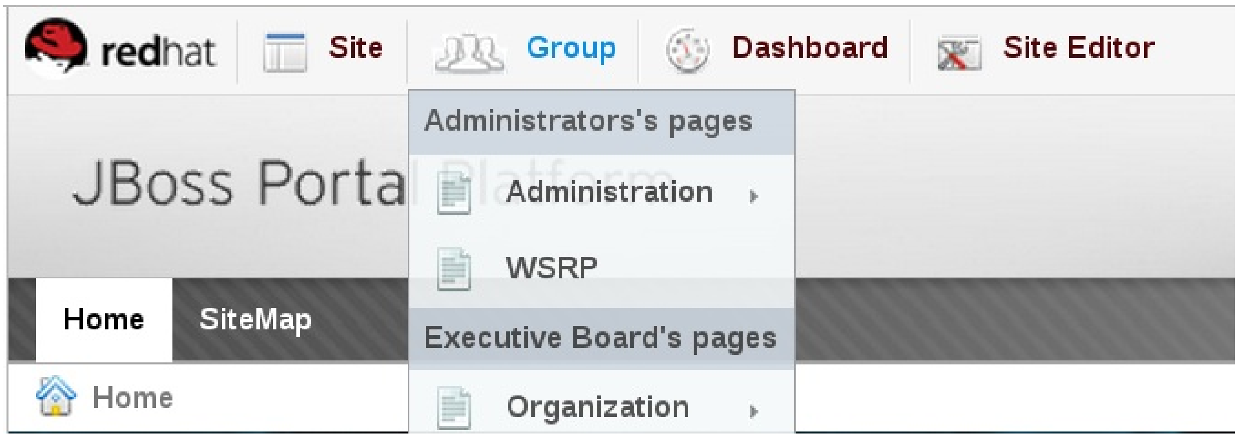
You can use the main menu (located under the product icon) to change the language or skin used in the portal or to sign out.

Site

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

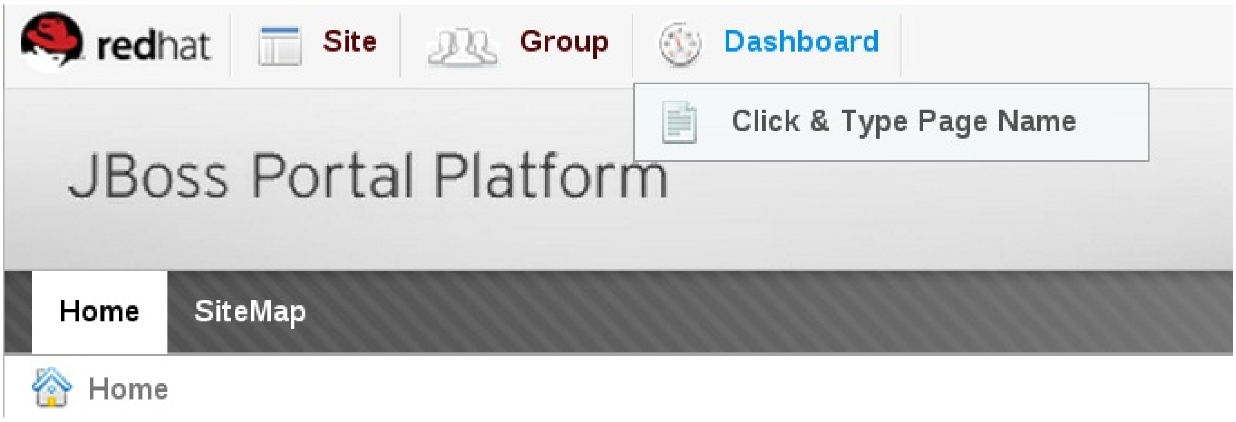
Group

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 changed when the Dashboard is open.

Report a bug

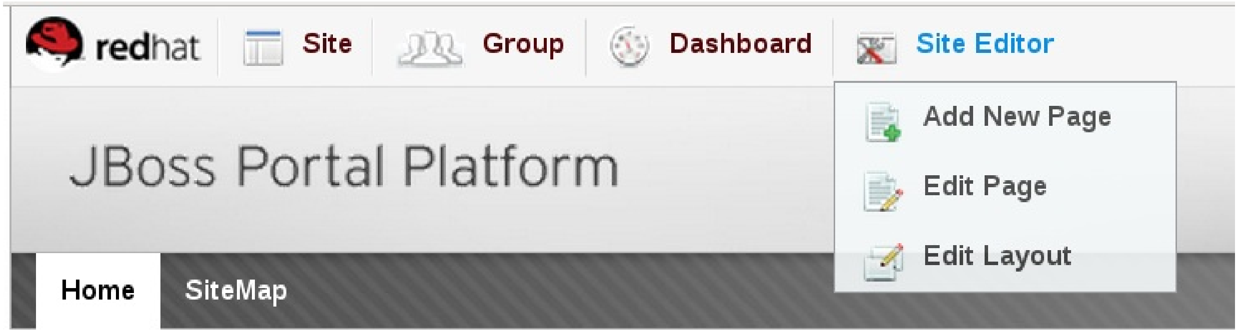
4.3. Administration Actions in the Toolbar

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.
- Change a page's layout.

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



Report a bug

Part II. Portal Administration

Chapter 5. Portals

5.1. Create a New Portal

Creating a new portal requires you to have a special permission that only an administrator can give you (if you are not an administrator).

1. Click on **Site** in the toolbar, then click the **Add New Portal** button.

2. This opens the **Create New Portal** window. Initially, the **Portal Setting** tab will be selected. On this tab, specify the following properties of the portal:

   Portal Name

   Enter the name of the new portal. This field is required and the value must be unique. The name must be between 3 and 30 characters and must begin with an alphabetical character or an underscore. Only alphabetical, numerical, dash and underscore characters are allowed.

   Label

   Enter a Label for the new portal. This field is optional.

   Description

   Enter a description of the portal. This field is optional.

   Locale

   Select the default display language for the portal.

   Skin

   Select a skin for a portal.

3. Switch to the **Properties** tab and choose values of the following properties:

   Keep session alive

   This property determines session timeout behavior. Choose one of the following values:

   - *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

   If checked, portlets added to a page will show an information bar containing their name, a help drop-down menu and minimize/maximize buttons.

4. Switch to the **Permission Setting** tab and set the permissions for the portal. Two types of permissions need to be set for a new portal; *Access Permission* and *Edit Permission*.

   - *Access Permission* can be set to allow global access by checking the **Make it Public** box. Alternatively, specific permission for groups can be added by clicking **Add Permission**, then selecting a group in the left pane of the box and then a membership level in the right pane.

- *Edit Permission* requires specific permissions to be set. Click on **Select Permission** and choose a group and level as above.

5. To use a template for your portal, switch to the **Portal Templates** tab. This tab lets you choose a template for the new portal from templates that are saved in the installation.

6. Click **Save** to create the portal.

See Also:

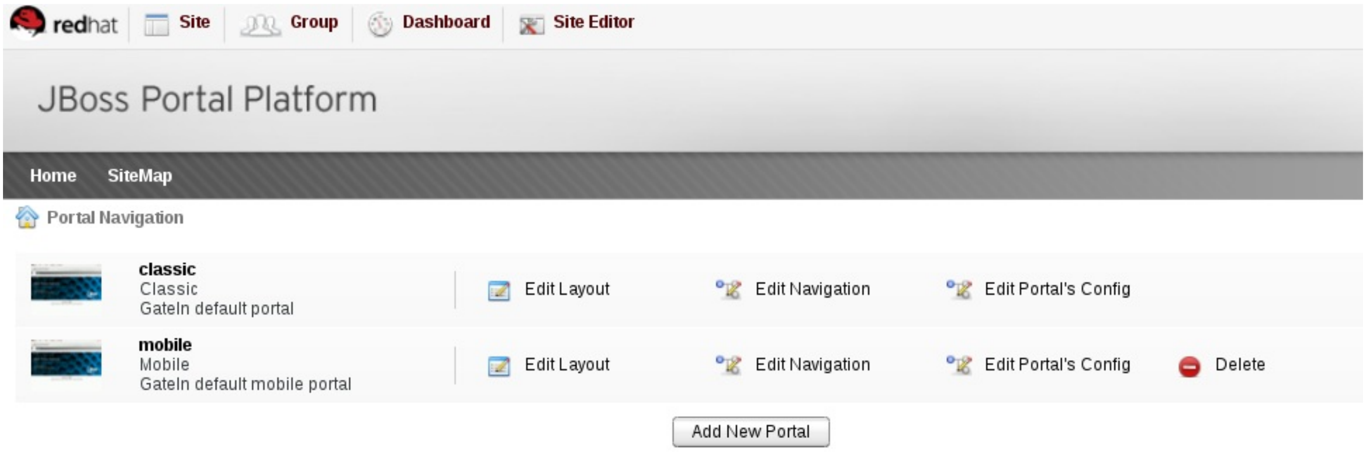
- Section 17.1, “Manage Users and Groups”
- Section 11.1, “Manage Permissions”
- Section 5.2, “Access a Portal”
- Section 5.6, “Delete a Portal”

Report a bug

5.2. Access a Portal

An administrator can access numerous portals running in the portal instance.

To access a portal, click **`Site`** on the Toolbar. The Site Management page opens, which shows a list of portals and possible actions:

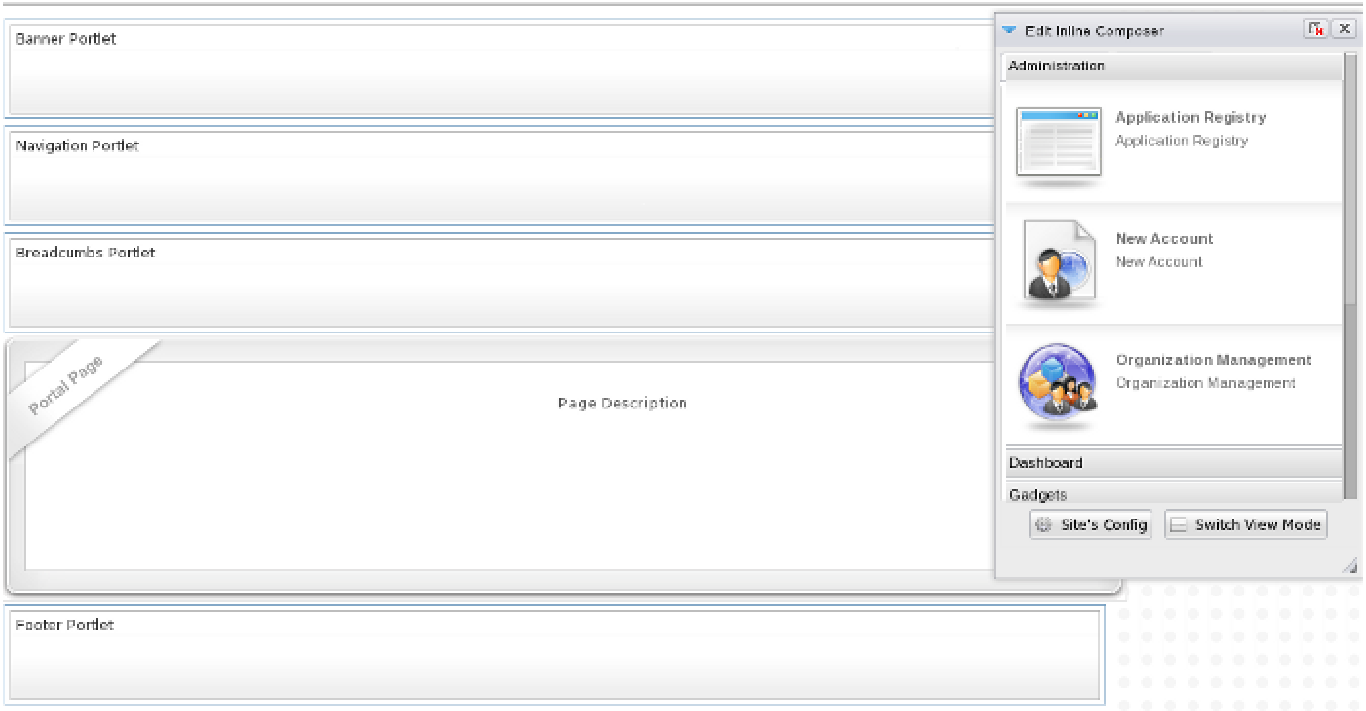


Report a bug

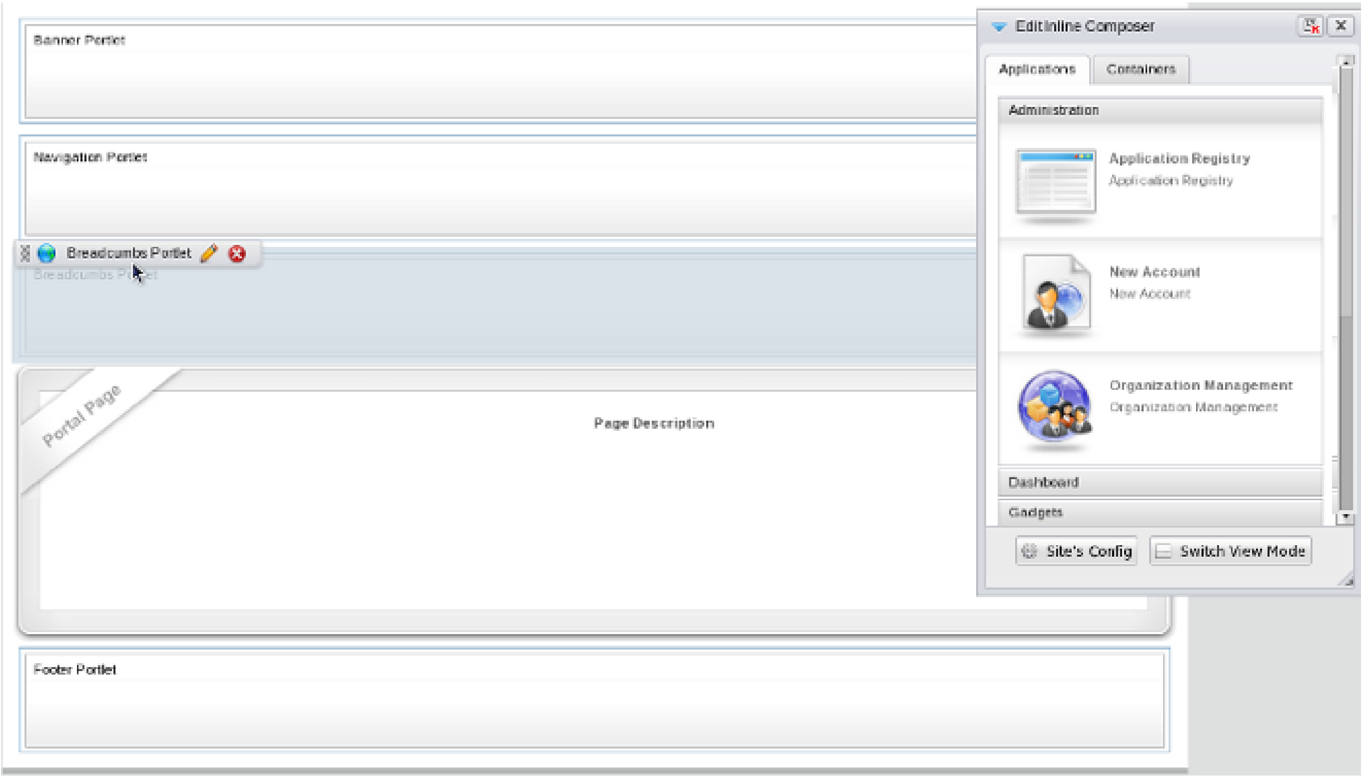
5.3. Edit Portal Layout

To edit the layout of a portal, click the **`Edit Layout`** button beside the active portal:

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:



Click the **`Finish`** or **`Abort`** buttons in the Edit Inline Composer window to save or discard your changes.

> **Note**
>
> For more information about creating and developing portlets see the following resources:
>
> - Red Hat JBoss Developer Studio *JBoss Portlet Tools User Guide*.
> - Red Hat JBoss Portal *Development Guide* (*Portlet Development* part).

Report a bug

5.4. Edit Portal Navigation

Click **Site** in the **Toolbar** and select the **Edit Navigation** link next to the portal to open the Navigation Management window.

The Navigation Management window allows the portal administrator to add new nodes or edit, copy, move, delete or clone existing nodes.

Report a bug

5.5. Edit Portal Properties

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

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

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

Report a bug

5.6. Delete a Portal

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

   The confirmation message will appear:

2. Click **OK**

Report a bug

5.7. 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.

There are two ways to change the portal skin, each offering differing effects on the user experience.

When you set skin using **method one** change is applied to this portal, and every user that accesses this portal will see it in the chosen skin.

When you change skin using **method two**, the skin is set for the logged in user and all portals within the domain will be shown with the chosen skin.

Portal skins set via method two have a higher priority when the portal is rendered.

Method One

1. Click on **Site**, then **Edit Portal's Config**.
2. In the **Portal Setting** tab, select another skin **Skin** list
3. Click **Save** to **Finish**.

Method Two

1. Mouse over the Start menu and click on **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.

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

Report a bug

5.8. Switch Between Portals

Mouse over **Site** on the Toolbar for a list all portals in which you have at least access rights:

Users switch between portals by clicking on the desired portal. Please wait a few seconds for the change to take effect.

Report a bug

5.9. Manage Services

Users with administrator privileges can run service methods and properties directly from the portal interface, using the controls provided in the **Group**+**Administration**+**Services Management** interface.

Services Management presents methods and properties organized by the service class name. Controls in the interface allow users to pass parameters and run commands to call the methods and properties.

Follow Task: Call a Method in the Services Management Interface. and Task: Call a Property in the Services Management Interface. to learn how to call methods and properties related to the **`org.exoplatform.portal.application.PortalStatistic`** classname. Adapt the procedures in these tasks to interact with other methods and properties for other portal classes available in the Services Management interface.

Task: Call a Method in the Services Management Interface.

Complete this task to call a method using the Services Management interface, which shows the average portal execution time in seconds.

Prerequisites

- The portal is running.
- You are authenticated with administrator privileges.

1. Click **Group**+**Administration**+**Services Management**
2. In the **Services** drop-down, select **portalstatistic** to display the available methods, including **getMaxTime**.
3. In the **Parameters** column, type the name of the portal to query. For example, to perform the query using the default portal, type **classic** .
4. In the **Action** column, click **Run** to display the execution time in the value group, underneath the Method table.

Task: Call a Property in the Services Management Interface.

Complete this task to call a property using the Services Management interface, which returns the identifiers of all known portals.

Prerequisites

- The portal is running.
- You are authenticated with administrator privileges.

1. Click **Group**+**Administration**+**Services Management**
2. In the **Services** drop-down, select **portalstatistic** to display the available methods on the Methods tab.
3. Click the Properties tab to display all available properties for the **portalstatistic** service.
4. In the **Action** column, click **Run** to display the name of all known portals, underneath the Properties table.

Report a bug

Chapter 6. Portlets and Gadgets

6.1. Import Portlets and Gadgets

This feature imports portlets/gadgets found in web applications on your server

> **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. In the **Group** menu, select **Administration** then **Application Registry**:
2. Click **Import Applications** on the right hand side. A confirmation message will appear.
3. Click **OK** to accept.

Report a bug

6.2. Manage Portlets and Gadgets

Portlets and gadgets are organized in different categories. Each category contains one or several portlets or gadgets. You can also mix portlets and gadgets into one category. By default all gadgets are placed in the *Gadgets* category.

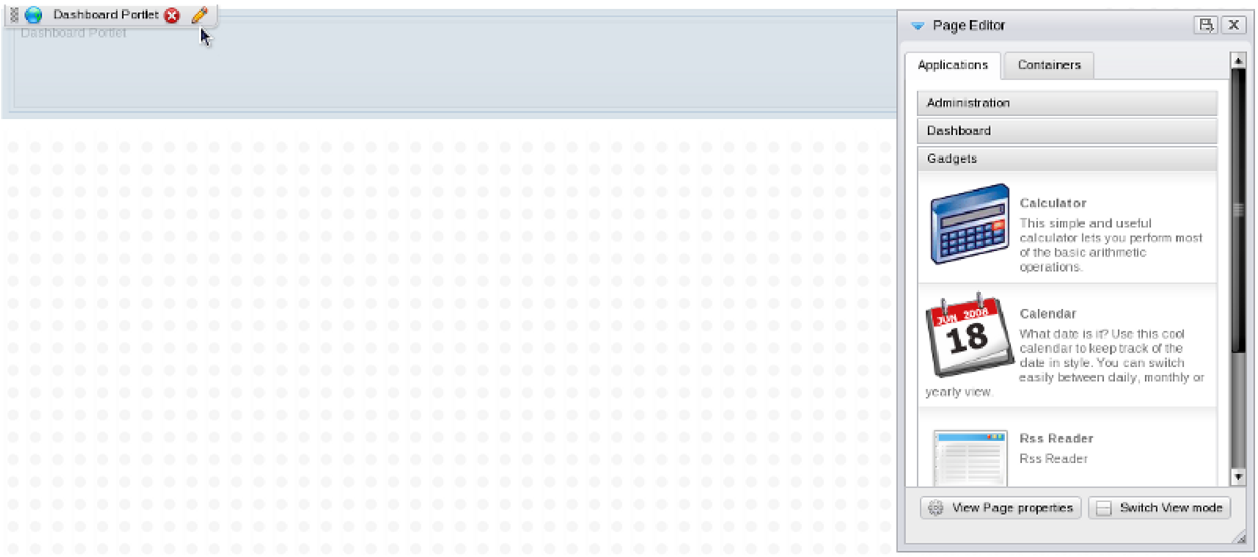
> **Important**
>
> Ensure gadgets are added to the Dashboard only.
>
> Preferences and user data will not persist between sessions if gadgets are added to other portal pages.
>
> This limitation will be corrected in a later version of the product.

Report a bug

6.3. Display Gadgets

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

1. Go to the Dashboard (by clicking **Dashboard** in the Toolbar)
2. Hover over **Dashboard Editor** and click **Edit Page** in the drop-down menu.
3. The Page editor will appear.
4. Hover over the **Dashboard Portlet** and click on the **Edit** icon (the 'pencil').



5. Change the number of columns in the **Number of columns** field. The maximum number of columns is four (4).

6. Click the **Save** button to accept the change.

7. Click **Close** and then click **Finish**.

Report a bug

6.4. Add a new Category

You easily add a new category by following this guide:

1. Hover over the **Group** menu, then **Administration** and click on **Application Registry**.

2. Click the **Add Category** button on the action bar:

   The **Category Setting** tab: includes common information about a category.

   Category name

   The name of the category. This field is required and its length must be between 3 and 30 characters. Only alpha, digit, dash and underscore characters are allowed.

   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.

   The **Permission Setting** tab provides access to the Permission manager.

   The permission criteria are used whenever a user creates or modifies a page. In that case the user can only see and use portlets in those categories on which he or she has access to (as defined by groups and memberships).

Report a bug

6.5. 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.

Report a bug

6.6. Delete a Category

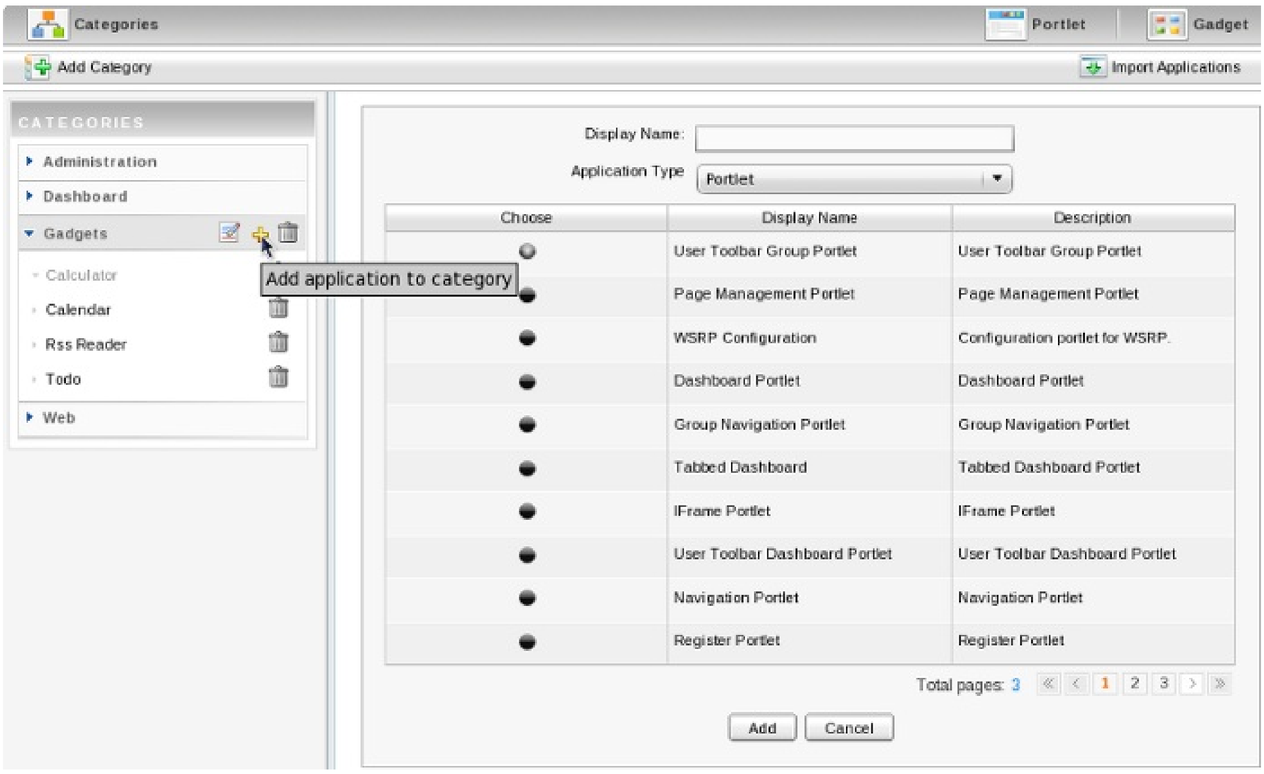
1. Click the Trash can icon located next to the title bar.
2. Accept the deletion by clicking **OK**

Report a bug

6.7. Add Applications to a Category

1. Click the "Plus" icon located next to the category (in the list on the left) to which you want to add an application.

   The image below shows the available application. You will see this list when you click the "Plus" icon.

   Display name

   The display name of a portlet/gadget.

   Application Type

   Either Portlet, Gadget or WSRP application.

2. Enter the display name and select a type

3. Select an application by checking the radio button. Note that there several pages of Portlet applications to choose from and that the content of the list changes when you select a different type of application from the **Application Type** drop-down menu.

4. Click the **Save** button to add the selected application to the category.

Report a bug

6.8. 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**

Report a bug

6.9. View/Edit portlet/gadget information

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

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 see the details of any portlet select it from the list on the left.

To edit a portlet, click the edit button to the right of the portlet's name:

Report a bug

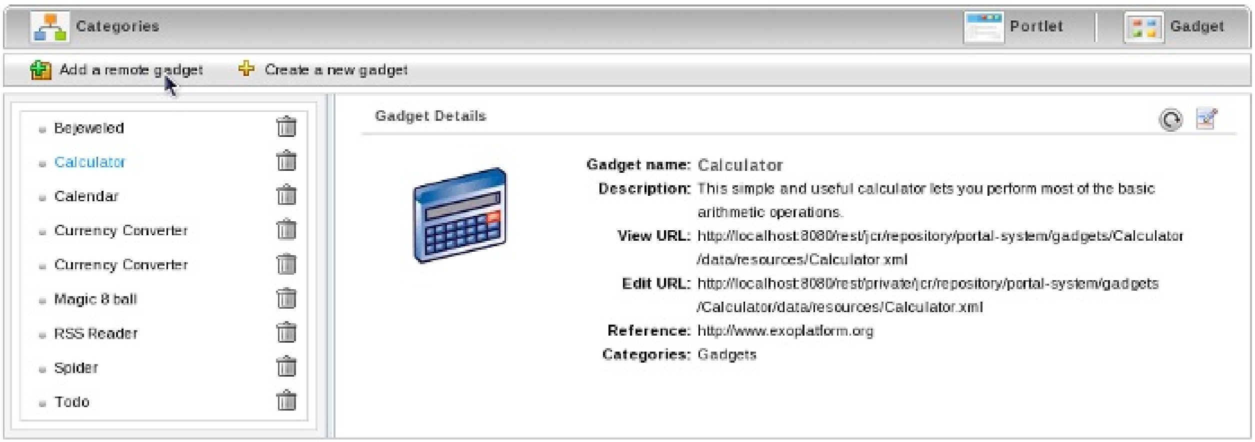
6.10. Add a Gadget

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

You may add a remote gadget using its URL or create a new gadget.

Procedure 6.1. Add a Remote Gadget

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



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

3. Click **Add**. The new remote gadget is visible in gadget list on the left pane.

Procedure 6.2. Create a new Gadget

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

2. Enter the xml code of the new gadget in the **Source** field.

Report a bug

6.11. Manage Gadgets

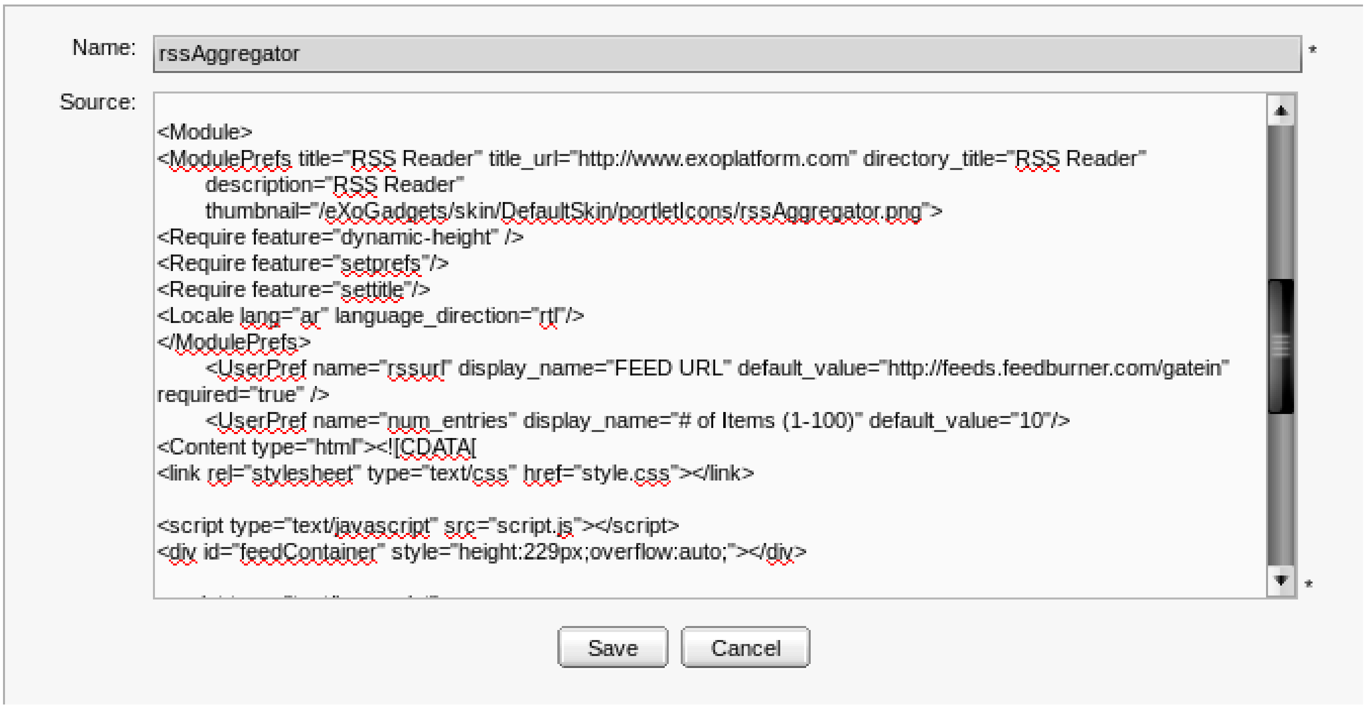
You can edit or refresh a gadget using the icons in the top right of the **Gadget Details** pane.

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

Report a bug

6.12. Edit a Gadget

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


Name:
rssAggregator
*
Source:
<Module>
<ModulePrefs title="RSS Reader" title_url="http://www.exoplatform.com" directory_title="RSS Reader"
description="RSS Reader"
thumbnail="/eXoGadgets/skin/DefaultSkin/portletIcons/rssAggregator.png">
<Require feature="dynamic-height" />
<Require feature="setprefs"/>
<Require feature="settitle"/>
<Locale lang="ar" language_direction="rtl"/>
</ModulePrefs>
<UserPref name="rssurl" display_name="FEED URL" default_value="http://feeds.feedburner.com/gatein"
required="true" />
<UserPref name="num_entries" display_name="# of Items (1-100)" default_value="10"/>
<Content type="html"><![CDATA[
<link rel="stylesheet" type="text/css" href="style.css"></link>
<script type="text/javascript" src="script.js"></script>
<div id="feedContainer" style="height:229px;overflow:auto;"></div>
*
Save
Cancel

Report a bug

Chapter 7. Gadgets in Portal

The portal consist of inbuilt gadgets such as Calender,ToDo, Calculator, and RSS Reader.

Default Gadgets

Calender

The calendar gadget allows you to switch between daily, monthly and yearly views. You can customize the gadget to match your portal theme.

ToDo

ToDo helps you to 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 using different colors.

Calculator

Calculator lets you perform basic arithmetic operations and can be customized to match your portal theme.

RSS Reader

RSS Reader collects content from various user feed sources and displays them in one location. This content includes, news headlines, blog posts or email. The RSS Reader gadget displays the content in a window on your portal page.

> **Note**
>
> To obtain more gadgets, see http://www.google.com/ig/directory?synd=open site. Red Hat JBoss Portal is compatible with most of these gadgets .

Report a bug

Chapter 8. Navigation Nodes

8.1. 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.

Report a bug

8.2. Add a new node

1. Click on **Site** then click on **Edit Navigation** of the portal 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 Node** option. The **ADD/EDIT PAGE 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, dash and underscore characters are allowed for this field and it must be between 3 and 30 characters.

   Extended label mode

   This is a new feature which allows Administrators to add labels to nodes in multiple supported languages. When the language of the site is changed, the nodes will display the appropriate localized label.

   Language

   Set the language for the node.

   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 allows administrators 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.

Page Id

The identification string of the page.

Name

The selected page's name.

Title

The selected page's title.

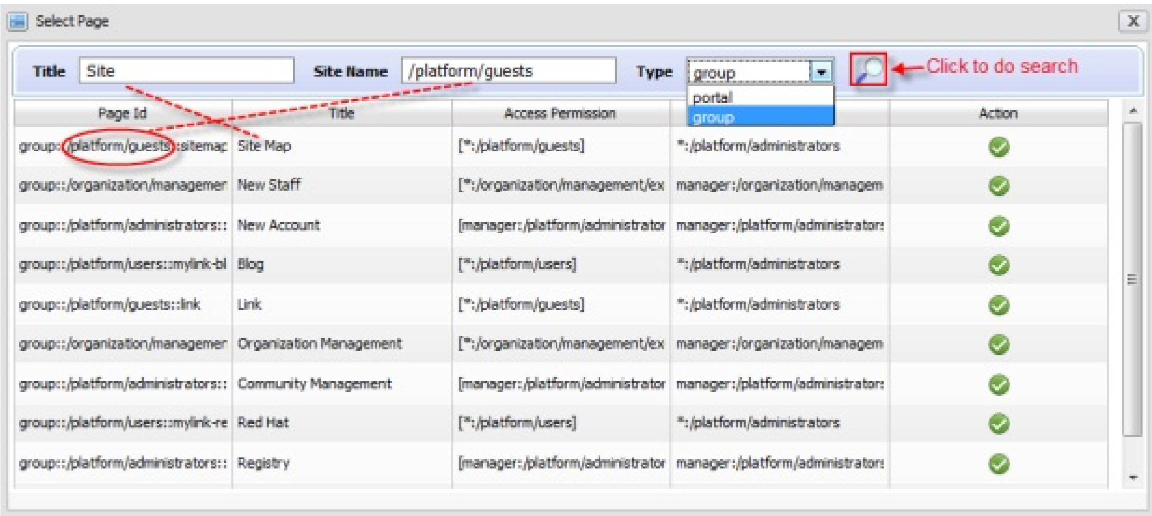
You do not have to enter values in these fields. They are automatically populated after selecting an existing page by clicking the **Search and Select Page** button.

The **Select Page** form appears:

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

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

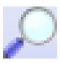
a. Enter your page title into the **Title** field to do search to Title;



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**.

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

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

d. Click ✅ on the row of the page you wish to select.

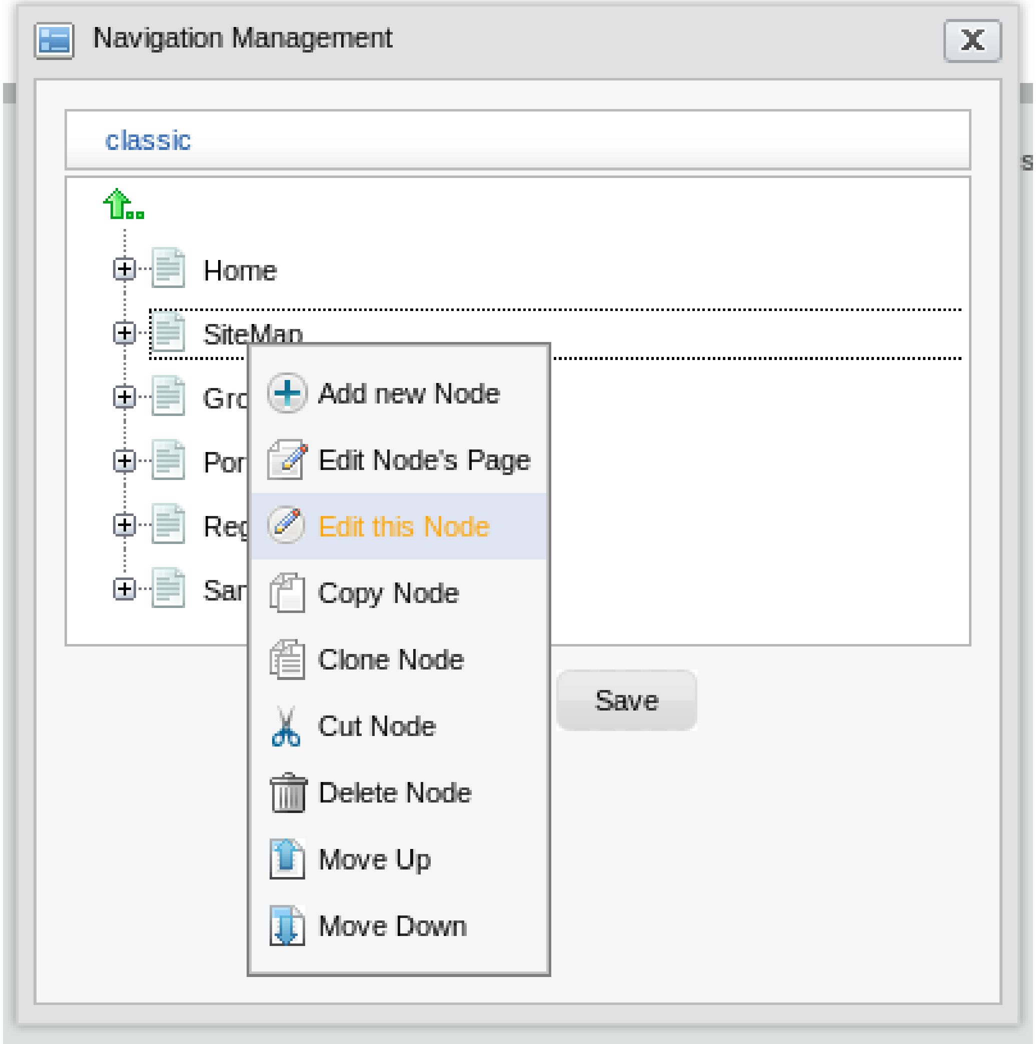
After selecting a page, the details of this page will be displayed in the **Page Selector** form.

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.

Report a bug

8.3. Edit a node

1. Click **Site**+**Edit Navigation**.
2. Right-click on the selected node and select the option**Edit this Node**.It displays the **Page Node Setting** tab.



3. In the **Page Node Setting** tab you can change the value of these fields:
   - Extended label node
   - Language
   - Label
   - Visible
   - Publication Date & time

4. After making the desired changes, click **Save** to accept changes or **Cancel** to exit without saving.

5. In the **Page Selector** tab you can search and select another page for this node by clicking the **Search and Select Page** button.

   After completing the edits required for this node, click **Save** to accept the changes or **Cancel** to exit without saving.

See Also:

- Section 8.2, “Add a new node”

Report a bug

8.4. Copy a node

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

2. Right-click on the selected node and select **Copy node** option.

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

Report a bug

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

2. Right-click on selected node and select **Clone node** option.

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

Report a bug

8.6. Cut a node

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

2. Right-click on 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**.

Report a bug

8.7. Delete a node

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

2. Right-click on the selected node and select **Delete node** option.

   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.

Report a bug

8.8. Change Node Order

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

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

2. Select the node that you want to move. Right click on the selected node and then click on **Move up** or **Move down**

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

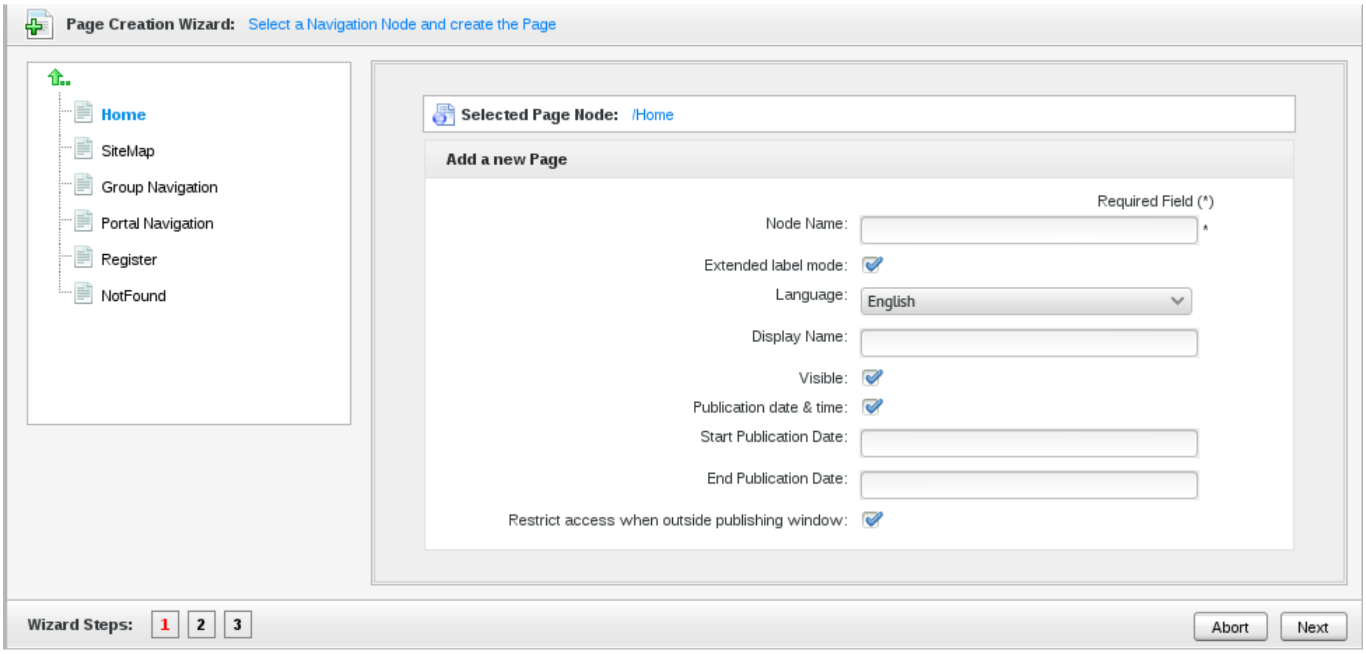
Report a bug

Chapter 9. Pages

9.1. Add a New Page using the Page Creation Wizard

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

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**.



In the left pane, you can navigate up and down the node/page structure.

In the right pane are the available parameters for a new page.

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

2. Complete the fields in the right pane, using Page Parameter Definitions as a guide.

3. Click **Next** or number '2' of the wizard steps to proceed to the next step.

4. Select **Empty Layout** for a blank page.

   Alternatively, click the drop down arrow at the top of the right pane to see more templates to select.

5. Click **Next** or number '3' of the wizard step to proceed to the next step.

6. Drag and drop portlets from the pop-up panel into the main pane to create the content for the page.

   Applications

      Lists all existing portlets

   Containers

      Lists all existing containers

   View Page properties

Shows various page settings (**`title`**, **`Page ID`** and more) and/or page permissions, which can be changed to suit the page.

> **Note**
>
> While in this view, click the **Switch View mode** button to view the content of this page as you design it.
>
> Switch between viewing the page by layout (showing containers and portlets) or previewing how the page will look when live. The contents of the page can be edited in either mode.

7. Once page configuration is complete, use the icons located in the top right corner of the **Page Editor** window to navigate as required:
   - Click **Back** (the small left-facing arrow) to return the previous step.
   - Click **Save** to create the page.
   - Click **Abort** to quit the page creation wizard, without saving any changes.

Page Parameter Definitions

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.

Extended label mode

This is a new feature which allows Administrators to add labels to pages in multiple supported languages. When the language of the site is changed, the pages will display the appropriate localized label.

Language

Set the language for the page.

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 check box toggles the global visibility of this page.

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

If unchecked, the page is not shown in the site map or navigation bar.

Important

The **`Visible`** check box must not be used as a security measure, as non-visible pages will still be accessible using a direct URL, such as http://localhost:8080/portal/private/classic/pagename.

Instead, use the **`Hide page when outside publishing window`** option to prevent direct URL access to a page.

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.

Important

The **`Publication Date & Time`** functionality must not be used as a security measure, as pages configured for time-specific publication will always be accessible using a direct URL regardless of publication dates.

Start Publication Date

The start date and time to publish the page. This field is only visible if the **`Publication date & time`** box is checked.

End Publication Date

The end date and time to publish the page. **This field is only visible if the *Publication date & time* box is checked**.

Note

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.

Hide page when outside publishing window

If a user accesses this page directly through a URL either before the Start Publication Date or after the End Publication Date, the user is redirected to the parent node. Additionally, an information message is displayed indicating the page is not available yet, or has expired.

Report a bug

9.2. Add a New Page using Page Management

1. Mouse over **Group** in the Toolbar, highlight **Administration** then select **Page Management**.
2. Click on **Add New Page**.

3. The fields in this window are:

   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 set to *portal* the page is created with shared ownership portal. Therefore users who have *edit* permissions on the *portal* level can edit this page type.

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

   Owner Id

   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.

   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, dash 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 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 120 characters in length.

   Show Max Window

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

4. Click **Save**.

Report a bug

9.3. Edit a Page

1. Click **Group**+**Administration**+**Page Management**.

2. Click the edit icon on the row of page to edit in the existing page list.

   Click View Page properties icon to show a form to edit page properties.

3. The properties presented in the Page Properties window are **`Page ID`**, **`Owner type`**, **`Owner Id`** and so on.

   Permission Setting

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

Access right

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

Current access permissions on page are listed in **`Access Permission Setting`** tab and you can remove permissions (by clicking the **`delete`** icon) or add further permission (by clicking 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 is set for a group of users only.

Edit right can be set for one specific membership type within a particular group (***** allows every membership type in a group).To reassign this right to another group, click **`Select Permission`** in the **`Edit Permission Setting`** tab to choose another one.

See Also:

- Section 9.2, “Add a New Page using Page Management”

Report a bug

9.4. Delete a Page

1. Mouse over **Group** in the Toolbar. Highlight **Administration** and then click on **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.

Report a bug

9.5. Drag and Drop the Page Body

It is possible for Administrators to reorganize and customize the appearance of a portal page by dragging and dropping elements.

1. From the toolbar, click **Site Editor** → **Edit Layout**.

2. Click on the **Portal Page**, and drag and drop content as required.

Report a bug

Part III. Site Administration

Chapter 10. Language

10.1. Change Interface Language

The priority of the interface language setting follows this hierarchy:

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

Be aware of this hierarchical order to change the language type appropriately.

See Also:

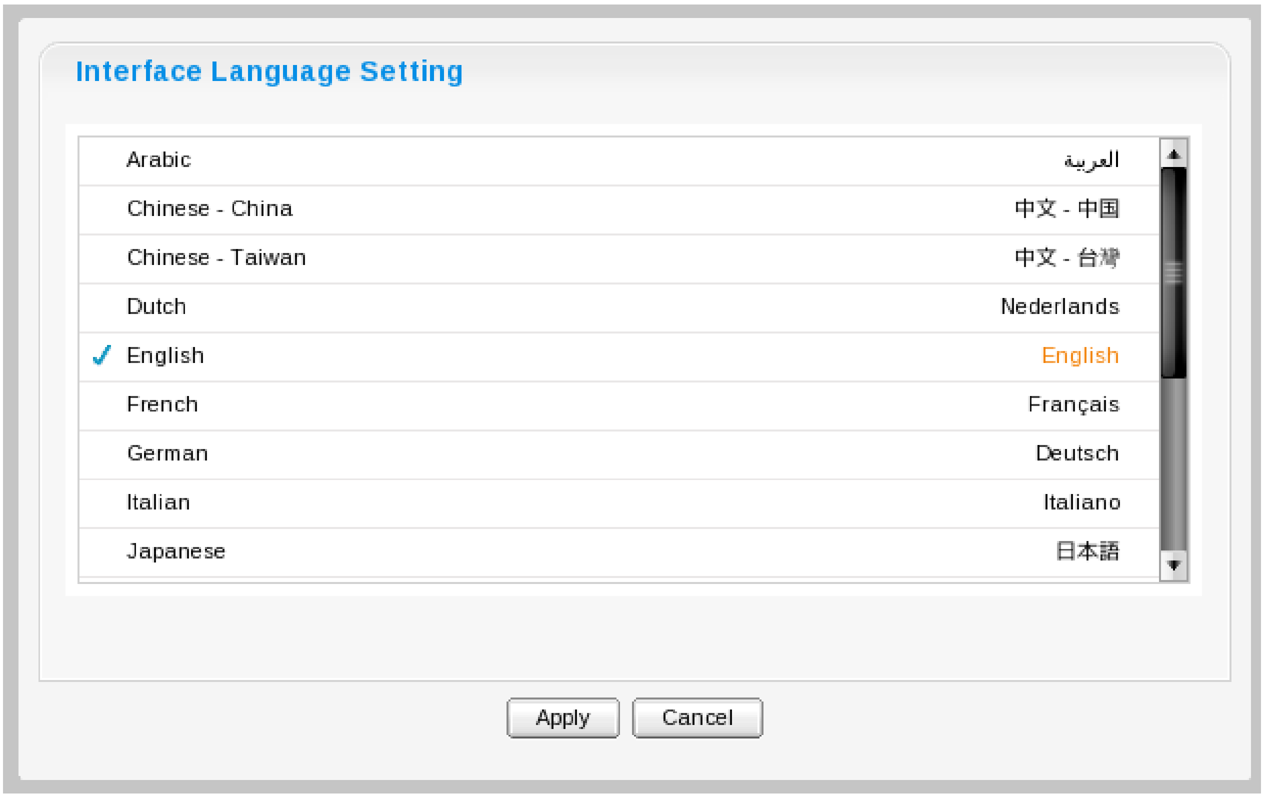
- Section 10.2, “Language for a user”
- Section 10.3, “Set language for a user”

Report a bug

10.2. Language for a 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 refreshes and displays its attributes in the selected language.

Report a bug

10.3. Set language for a user

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

Public Mode

The interface language is dictated by the language setting of the web browser.

If the language is set to one that the portal does not support, the language displayed is the language set at the Portal level (see above).

Private Mode

The interface language is set when registering each user.

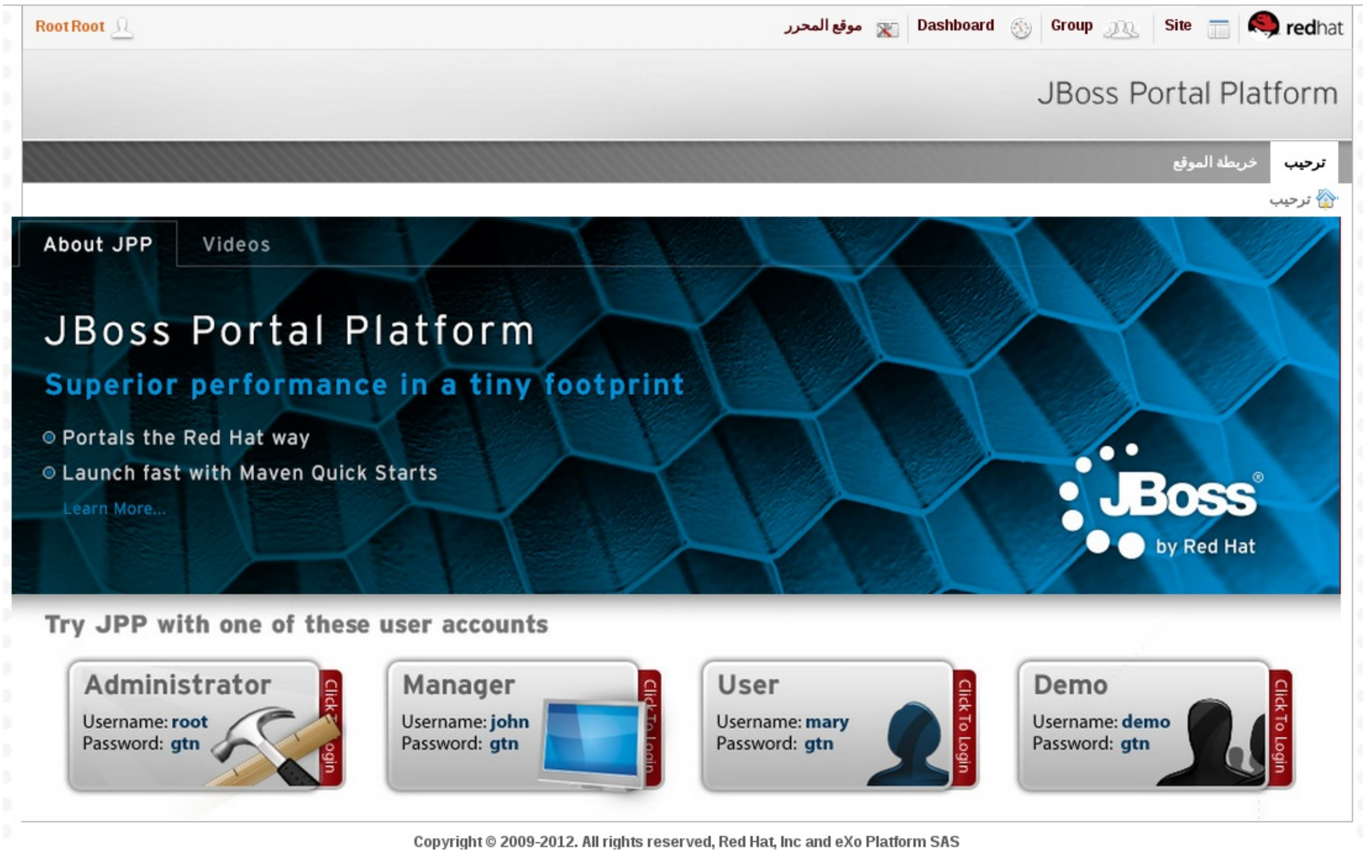
See Also:

- Section 14.1, “Register New Accounts”

Report a bug

10.4. Right To Left Support

Right to Left (RTL) languages are supported in the portal.



Report a bug

10.5. Multi-Language Navigation Nodes

The portal supports a multi-language environment, which allows any menu entry on the navigation to be internationalized.

Because the navigation bar is composed of nodes, the node display name must be modified to enable multi-language support. Instead of entering the display name of the node in a defined language (English, for example) a language-neutral 'resource key' is required.

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

Note

A localization feature called Extended Label Mode is available, which allows site administrators to add labels to nodes and pages in multiple supported languages. When the language of the site is changed, the nodes display the appropriate localized label.

Report a bug

10.6. 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.

Report a bug

10.7. Creating Keys

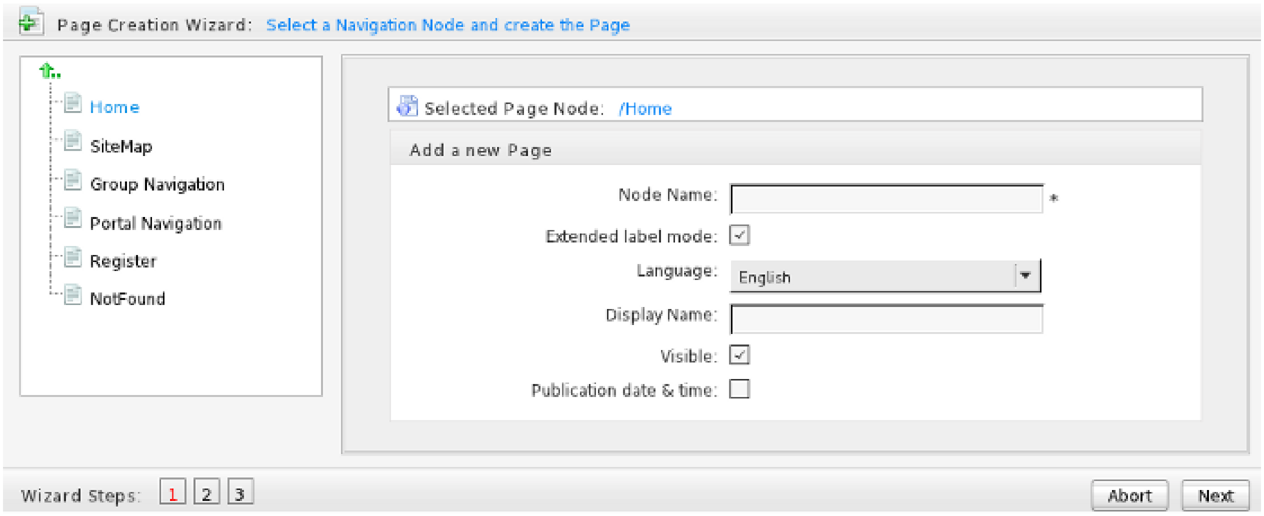
There are two ways to create a key for a node:

- Use the method described in Section 10.8, “Creating Keys using Create Page Wizard”
- Use the methods described in Section 10.9, “Creating Keys using Navigation Management”

Report a bug

10.8. 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.

Report a bug

10.9. Creating 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.

Report a bug

10.10. 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: **`/jboss-as/server/<PROFILE>/deploy/gatein.ear/02portal.war/WEB-INF/classes/locale/navigation/portal/<PORTAL_NAME>_<LANGUAGE_CODE>.properties`**

Report a bug

Chapter 11. Permissions

11.1. 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.

This section describes how to access permission settings using the Portal User Interface. The section covers setting Permissions for Sites. The Permission settings for Pages, Applications and Application categories are similar to Sites settings.

See Also:

- Section 2.8, “About Permissions”

Report a bug

11.2. Set Site Permissions

There are two ways to access the Permissions panel for Sites.

New Site

Click on **Site** on the **`Toolbar`** , then click on **Add New Portal** → **Permissions** tab.

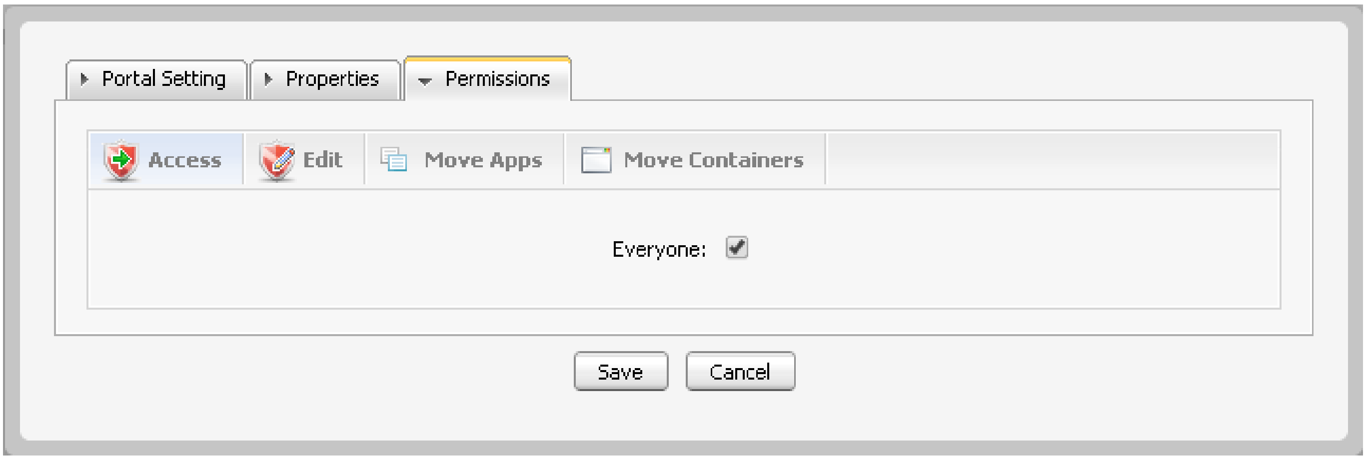
Existing Site

Click on **Site** on the **`Toolbar`**, then click on **Edit Portal's Properties** → **Permissions** tab.

Report a bug

11.3. Set Access Permissions on a Site

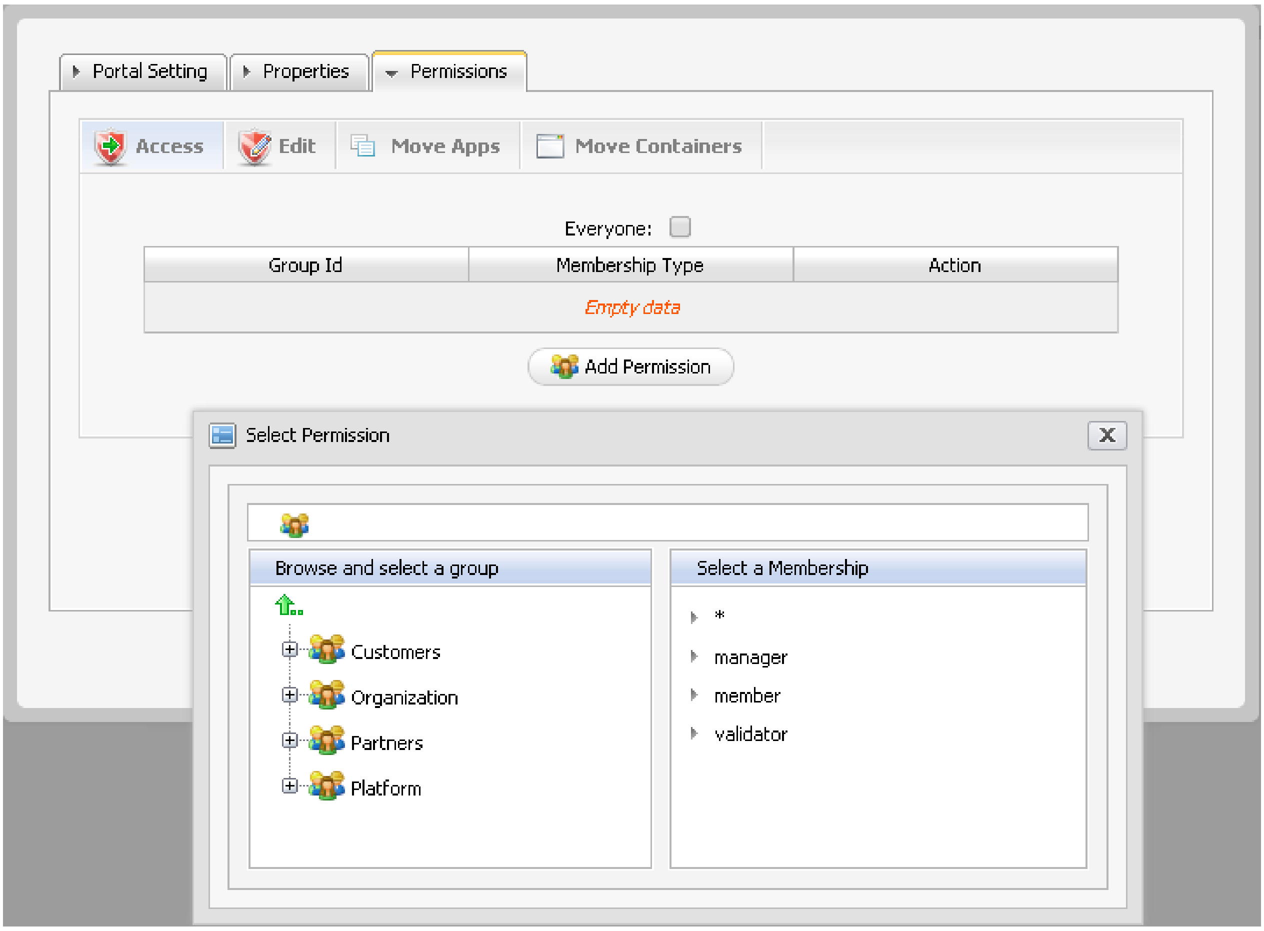
To allow a site to be publicly accessible, ensure the **Everyone** check box is checked.



If **Everyone** is clear, you need to add permissions by user group.

1. Click **`Add Permission`**.
2. On the **`Select Permission`** dialogue box, choose the appropriate group and membership

options.



3. After selecting a membership type, the selected permission is displayed in the access permission list.

At a given time, you can select one group with one membership type. To add multiple groups and members, repeat the above steps.

Similarly the Move Apps Permissions and Move Containers Permissions can be set.

Report a bug

11.4. Set Edit Permissions on a Site

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

1. Click **`Edit`** tab.

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 **Select Permission** dialog box.

> **Note**
>
> You can select * to assign all available membership types to the selected group.

Report a bug

11.5. Set Page Permission

User

If the owner type of a page is user then only the creator of the Page has Access or 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.

Report a bug

11.6. Set Access Permissions on a Page

1. Open the Page. Select **Site Editor** on the Toolbar and select **Edit Page**.
2. Click **View Page Properties** in the **Page Editor** dialog box.
3. Click the **Permissions** tab.

Report a bug

11.7. Set Edit Permissions on a Page

The Permissions tab can be accessed in two ways:

Procedure 11.1. Edit Page

1. Mouse over **Site Editor** on the Toolbar and select **Edit Page**.
2. Click on **View Page Properties** in the **Page Editor**.
3. Click the **Permissions** tab.

Procedure 11.2. Page Management

1. Mouse over **Group** on the Toolbar, highlight **Administration** and click on **Page Management**.
2. Using the **Page Id** column, locate the page to be edited, then click the edit icon (next to the trash icon). The **Page Editor** dialog box opens.

3. Click on **View Page Properties** in the **Page Editor**.

4. Click on the **Permissions** tab to edit all types of permissions.

> **Note**
>
> Page Editor is also a part of Page Creation Wizard so you can edit all types of Permissions for a newly created page through the Page Creation Wizard.

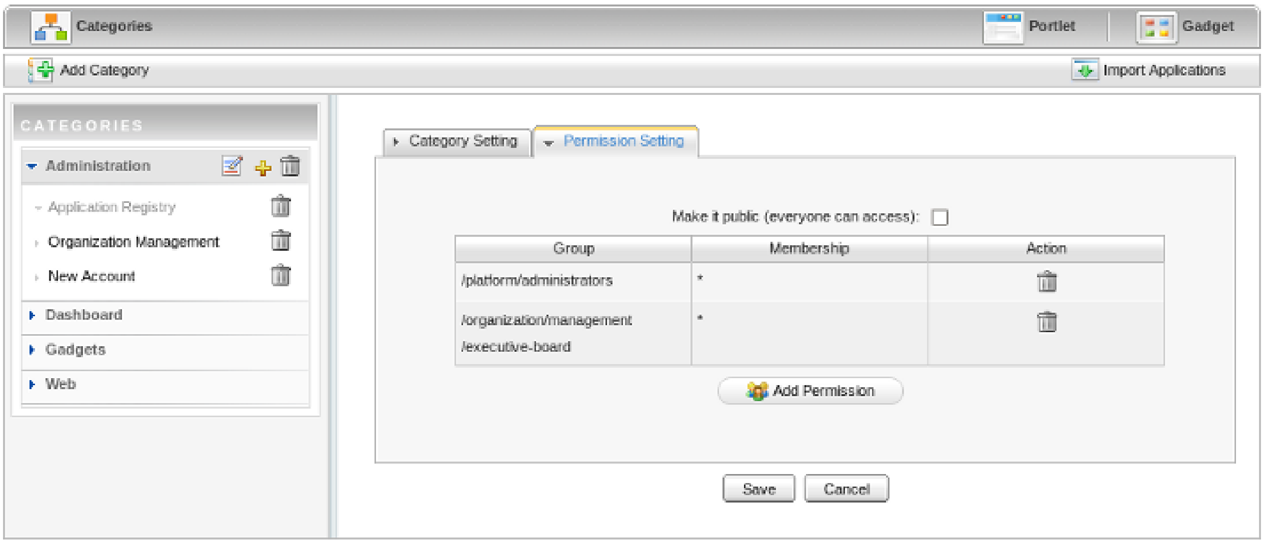
Report a bug

11.8. Set Access Permission on a Category

Setting access permission on a category controls which categories are listed in Page Editor dialog when editing a Page or Site.

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

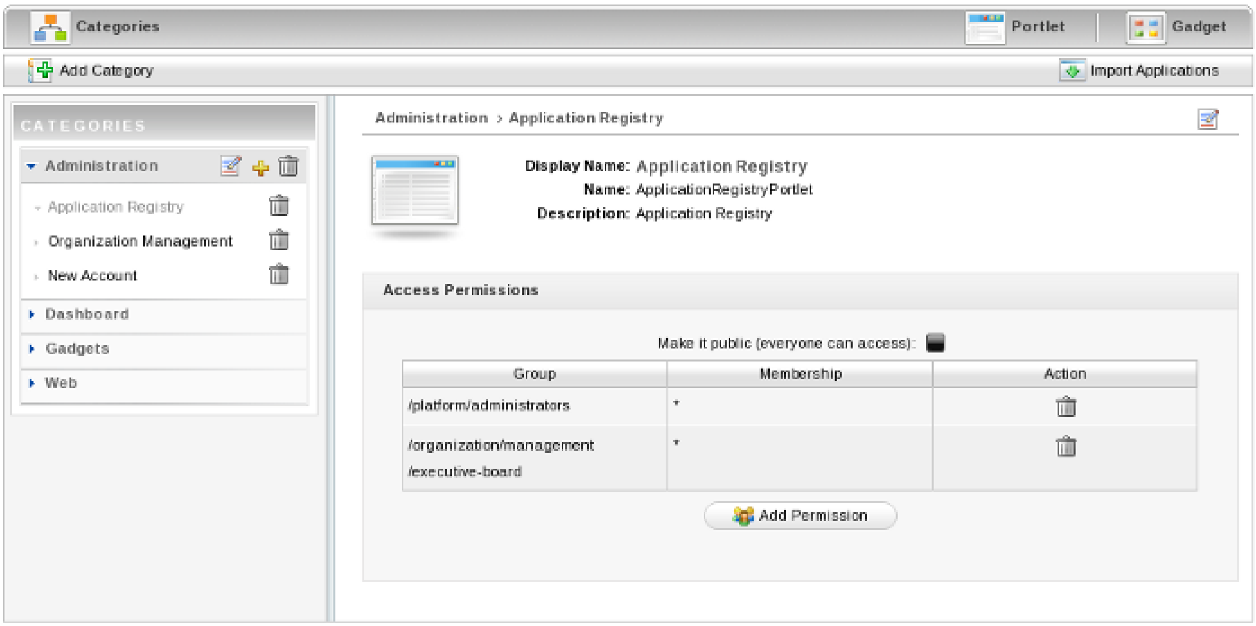
2. In the list of categories available in the left pane, click the edit icon, then choose the **Permission Setting** tab.



Report a bug

11.9. Set Access Permission on a Portlet

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



2. Select a category on the left pane that includes the portlet to set rights for. The **`Access Permissions`** panel opens.

Report a bug

Chapter 12. Site Redirection

12.1. Site Redirection

JBoss Portal includes a mechanism to redirect user to a different site within the portal based on the characteristics of their browser. This is especially useful for redirecting users to a mobile optimized site when detected they are accessing the portal from a mobile device.

Report a bug

12.2. About Site Redirection

Redirections can be based on various criteria, specified as conditions:

- The user agent string of the browser accessing the site
- Any property which can be determined via javascript. This can include things like screen size, pixel density and if the device supports touch or not.

Mapping nodes between original and redirect site when performing the redirect is also available, allowing greater control over what page within the site a user will end up on when a redirect is performed.

The following sections will briefly explain how to configure and setup the site redirection service using the administration user interface.

For details on how to configure site redirects using xml configuration files, see the Administration and Configuration guide chapter *Site Redirection*

Report a bug

12.3. Manage Site Redirections

To manage site redirection follow these steps:

Procedure 12.1. Manage Site Redirection

1. Navigate to **Group** → **Administration** → **Site Redirects and Import Export**.

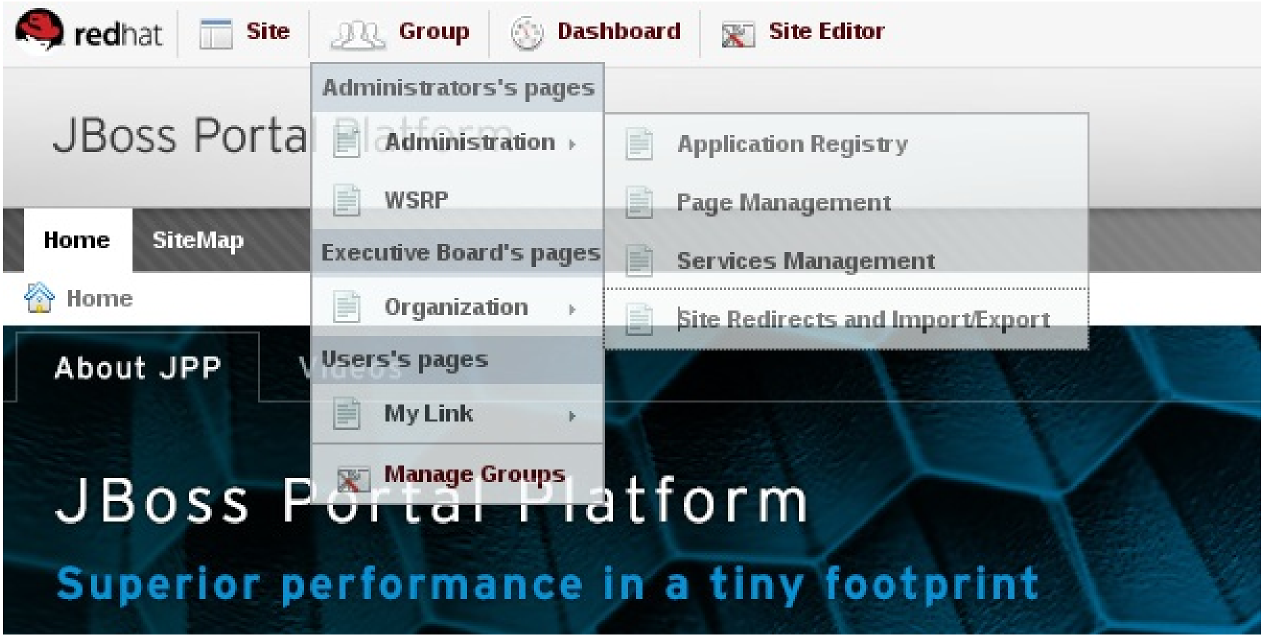


Figure 12.1. Site Redirection-Import Export Menu

2. Select the site for which a new Site Redirect rule is to be created. The Sites screen lists the site types as classic and mobile.

3. Existing Site Redirects listing will be shown, along with the **`Add Redirect`** button. Click the **`Add Redirect`** to add a new one or click the **`Configure`** (wrench icon) to configure an existing one.

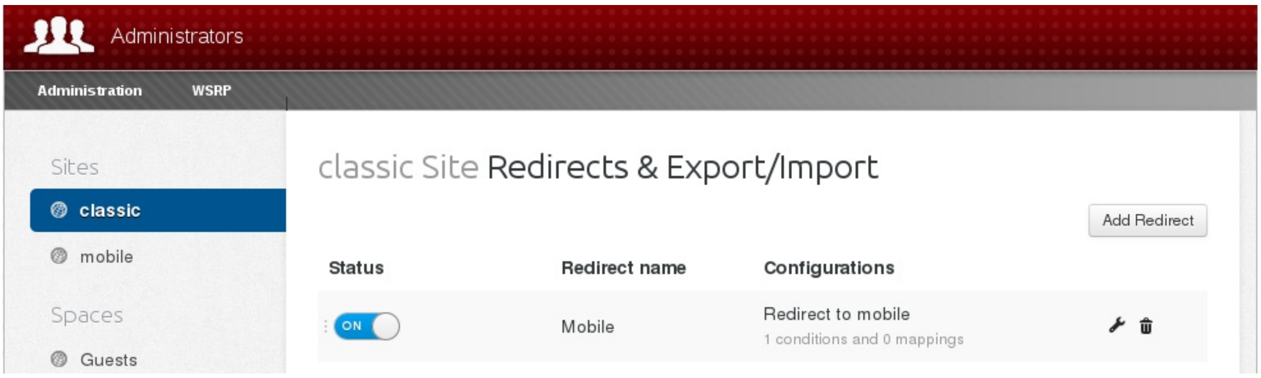


Figure 12.2. Listings

4. Once a Redirect is created, a name must be given and selected the site where it will redirect to, based on the conditions to be configured. There is also a toggle indicating whether the redirect is currently enabled (ON) or disabled (OFF). By default it will be disabled on creation.

5. Click **Conditions** → **Add Condition** to define the conditions which will trigger the redirect.

6. In the conditions modal, a name must be given to the Condition (a default name is created).

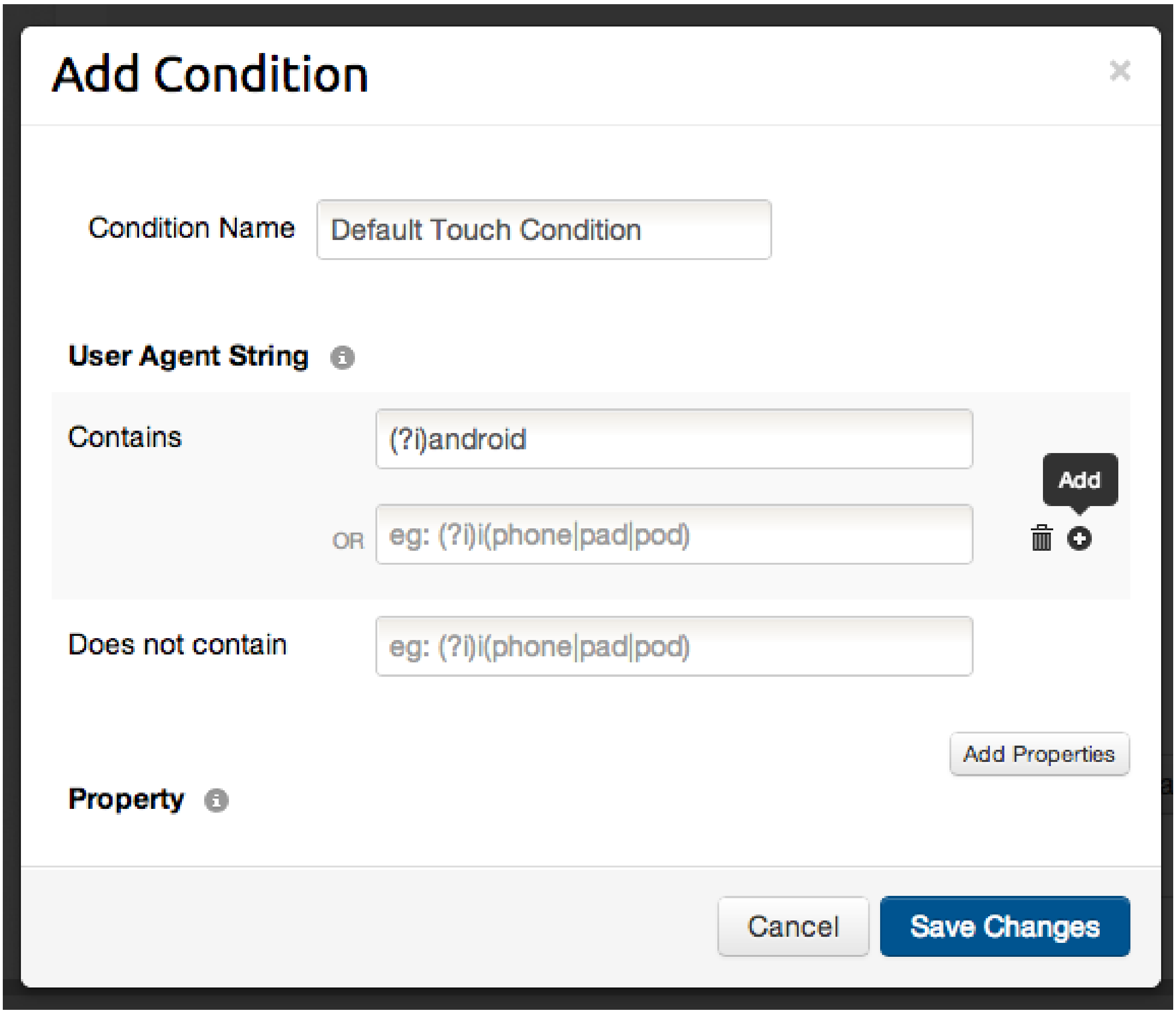


Figure 12.3. Add Condition

7. In the User Agent String section valid Java regular expressions must be used in the Contains and Does not contain entries, which will be evaluated against the browser User Agent string. New conditions can be added (which will be overwritten with existing ones) by clicking the **Add** button (plus sign icon) and existing ones may be removed by clicking the **Delete** button (trash icon).

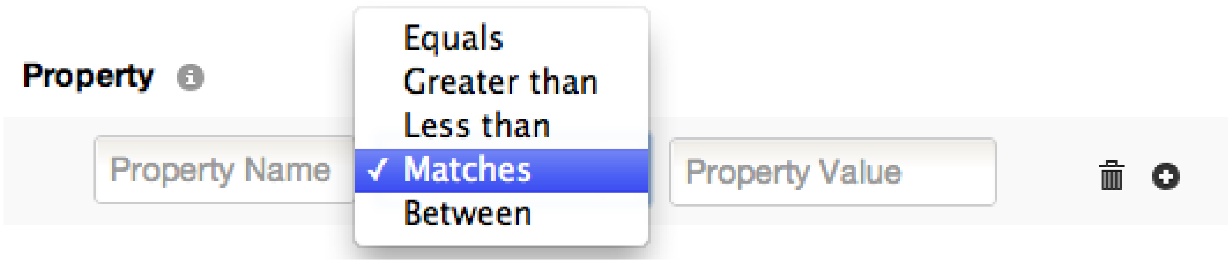


Figure 12.4. Condition Property

8. Predefined properties can be added to assist on condition matching, by clicking the **Add Properties** button. Different operators are available for defining these properties.

9. Click **Save Changes** to create or update the condition or **Cancel** to revert the creation or changes.

10. Conditions can be sorted (for performance reasons, having the less expensive ones on top, for instance) by dragging the condition row and dropping in the desired position.

11. Configure Node Mappings maps landing site nodes to redirected site nodes. By default this functionality is enabled, to change select **Use node name matching**.

12. Click **Add Mapping** to add a new node mapping. Existing Node Mappings can be deleted by clicking the **Delete Node Mapping**.

13. Nodes can be selected by clicking the **View Node List** both for the Origin and for the Redirect sites.

14. Select a default action for unresolved nodes from the drop-down menu.

15. Click **Save Changes** to create (or update) the Site Redirect or **Cancel** button to cancel all the changes.

16. Redirects can be sorted (for fine-graining purposes, such as having a mobile and a touch site redirect, for instance) by dragging and dropping in the desired position.

17. Redirects can be deleted by clicking the **Delete Redirect** button (icon trash) and confirming or canceling in the confirmation modal, as desired.

Administrator Credentials Required

Creating, editing and deleting a portal redirect requires access credentials that only an administrator may set up.

Report a bug

Chapter 13. Mobile and Responsive Portal Site

13.1. Creating a Responsive Site

To create a responsive site, it is important to configure some important options. These options ensure that the site works properly:

Report a bug

13.2. Portal Skin

The portal skin does not have a fixed width. If the skin uses a fixed width, like the classic skin, it will not adapt to the browser size. The 'Responsive Skin' included in JBoss Portal uses a fluid width and adapts to the portal. This skin also includes updated css to various portal components responsive. It is recommended to use this skin or to base a custom skin off of the 'Responsive Skin'.

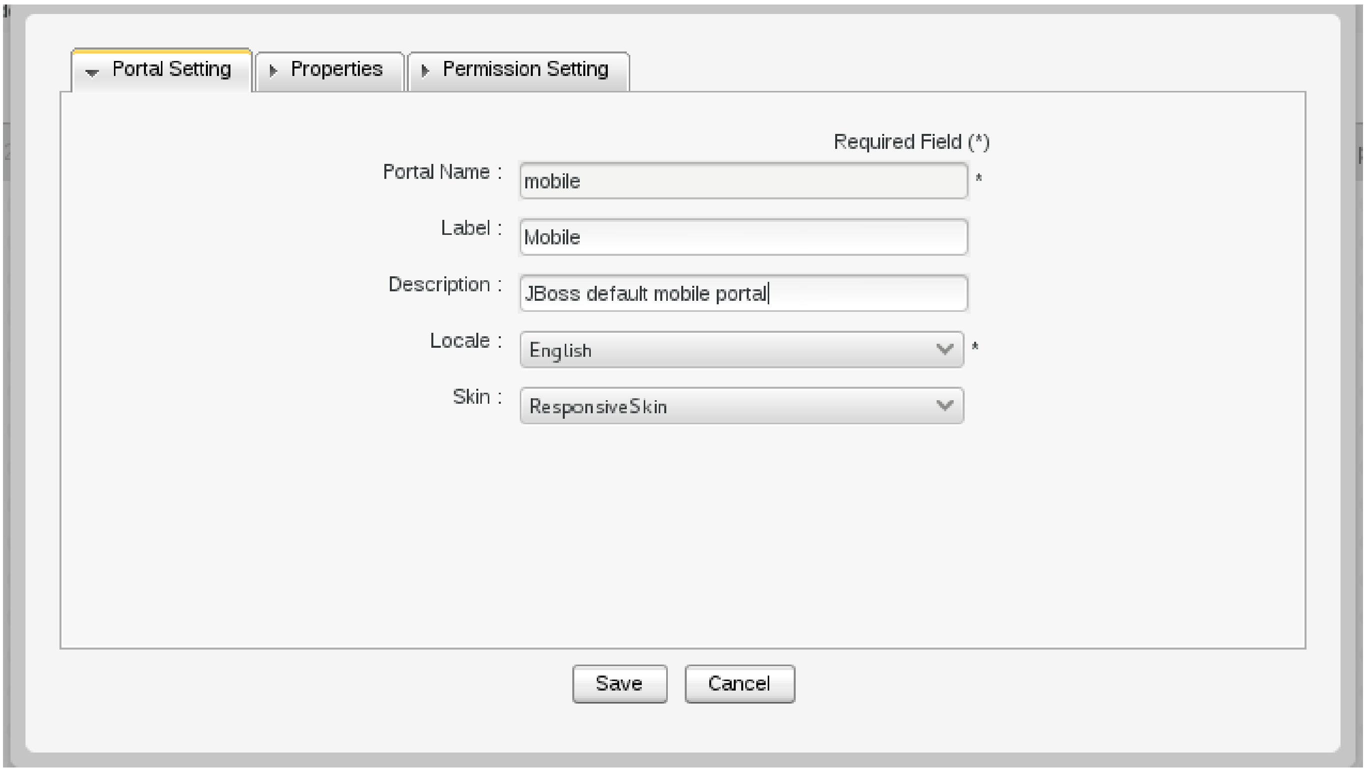


Figure 13.1. Portal Settings

Report a bug

13.3. Viewport

The viewport settings specify how the site is loaded in a mobile browser. It specifies things like the site's width,height, initial zoom level, and what zoom levels are permitted. By not specifying the viewport, the site may be rendered at a fixed width instead of adapting to the screen size. The default value used in the 'Mobile' site is 'initial-scale=1.0' which specifies that the page is rendered to its screen size while still allowing the user to zoom into the page if needed.

The viewport is specified as the portal property 'Viewport Content', the value specified here will set the viewport meta tag for the site.

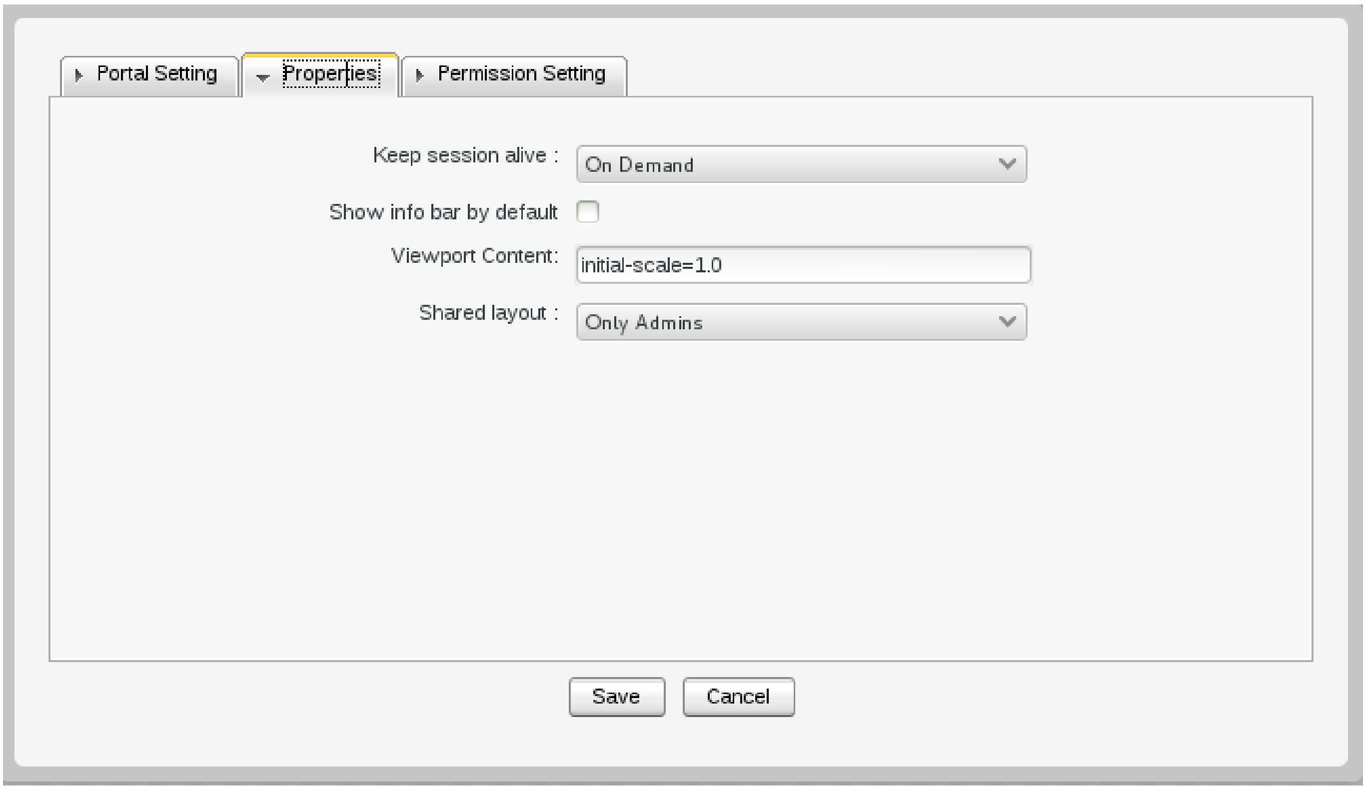


Figure 13.2. Portal Properties

Report a bug

13.4. Mobile Template

To pre-populate your site with the same layout and portlets that are available on the mobile site, can be accomplished by using the 'mobile portal template' when you create the portal.

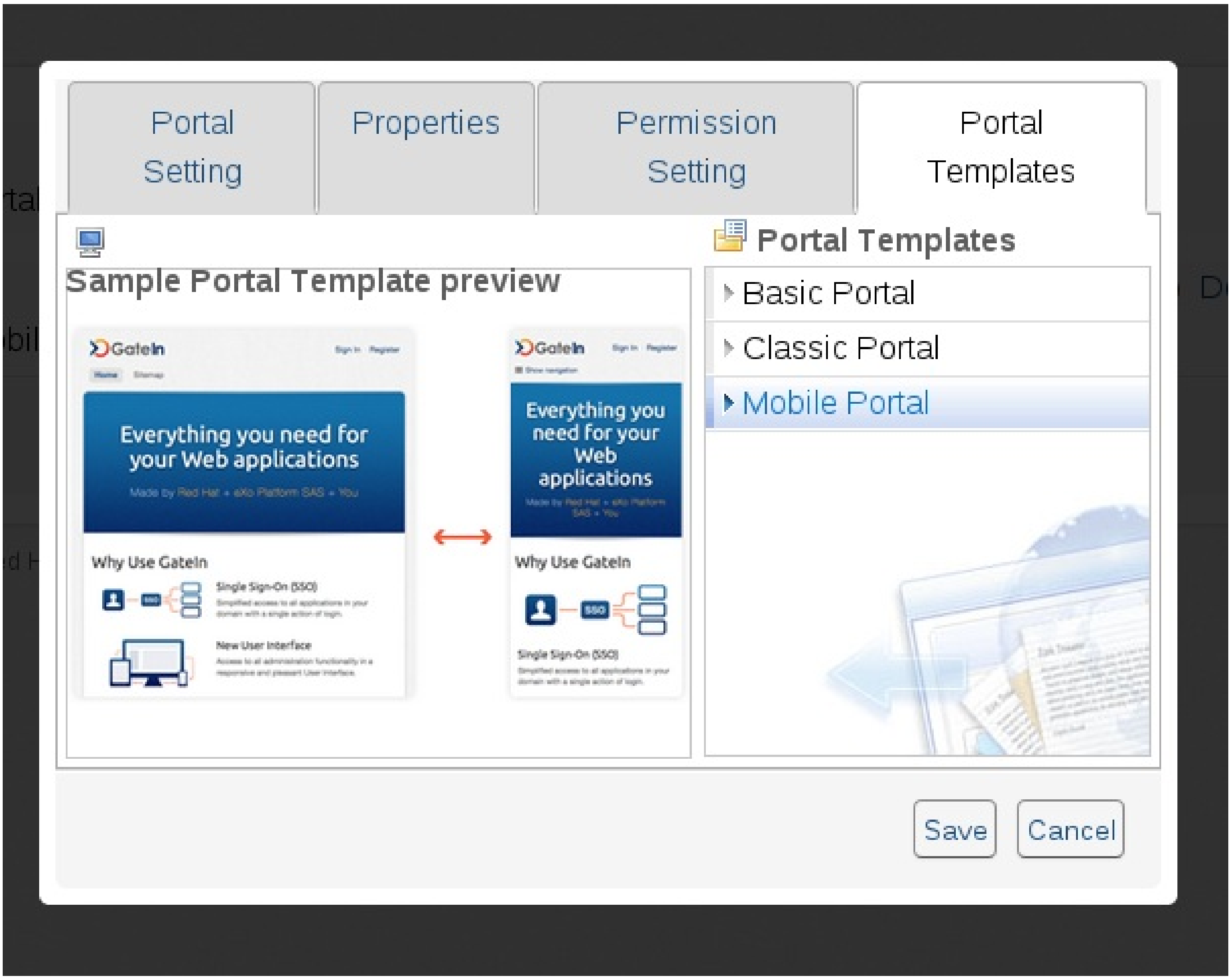


Figure 13.3. Mobile Templates

Report a bug

13.5. Responsive Portlets

To create a responsive site, your site has to use responsive portlets. This includes using the responsive portlets which are included with JBoss Portal and ensuring that any custom or third party portlets are also responsive and will work with a variable width layout.

See Also:

- Section 13.1, "Creating a Responsive Site"

Report a bug

13.6. Portlet Layout

The containers which work with responsive portlets are the row layouts. This allows one portlet per line and the portlet can easily adapt to the width of the browser.

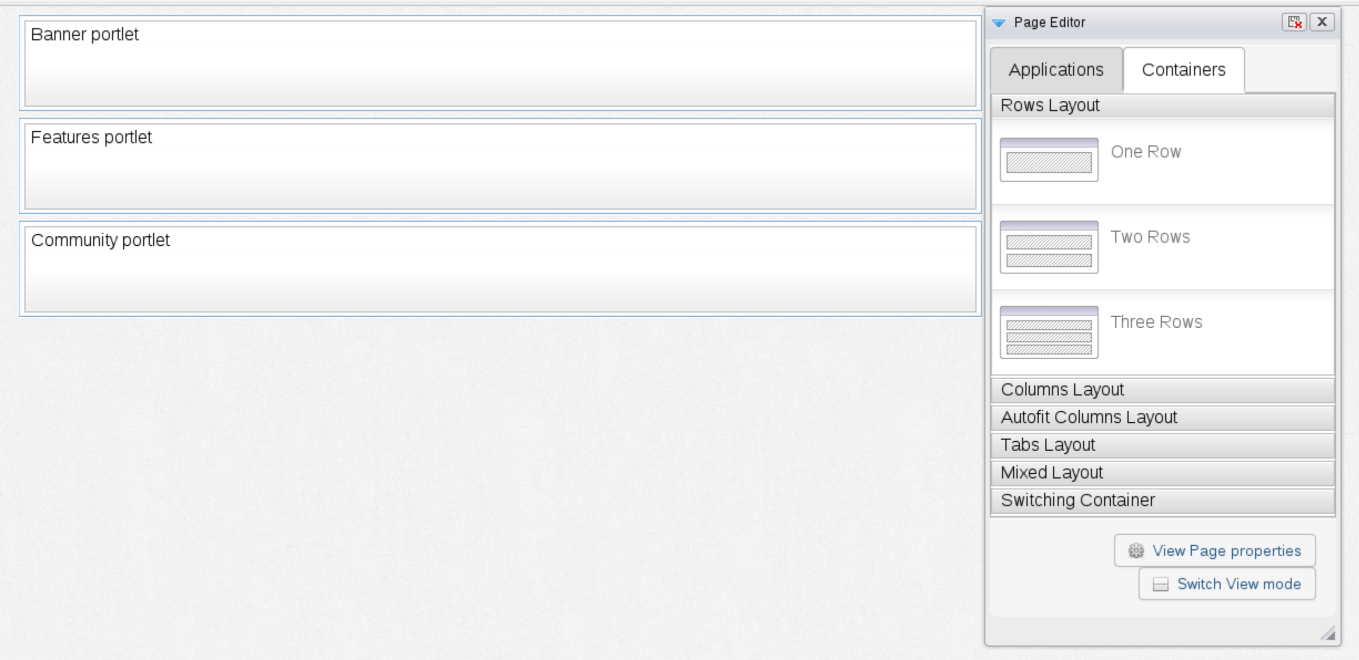


Figure 13.4. Row Layout

Report a bug

13.7. Creating Responsive Portlets

The biggest change to having responsive portlets is that the site is no longer set at a fixed width. The width of the page will adapt to the size of the screen used to display the page. As such portlets which have been designed to fill a specific fixed space may not render correctly when the screen width differs from what it expects. This includes things like overflowing content, contents being clipped, content flowing into a new line, etc.

Responsive portlets must be written in a more fluid manner where the layout changes based on the width of the page. This is done in the same manner as creating any normal responsive html page, by mostly using CSS3 media queries. There is nothing inherently different about this approach with portlets and there are no special apis or other data which must be gathered from the portal itself.

As already mentioned in the limitation section and creating a responsive site section, the site should be done in a row layout. With each portlet stacked one on top of another and taking up more or less the actual width of the page, it makes it easier to configure the portlet's css to be responsive.

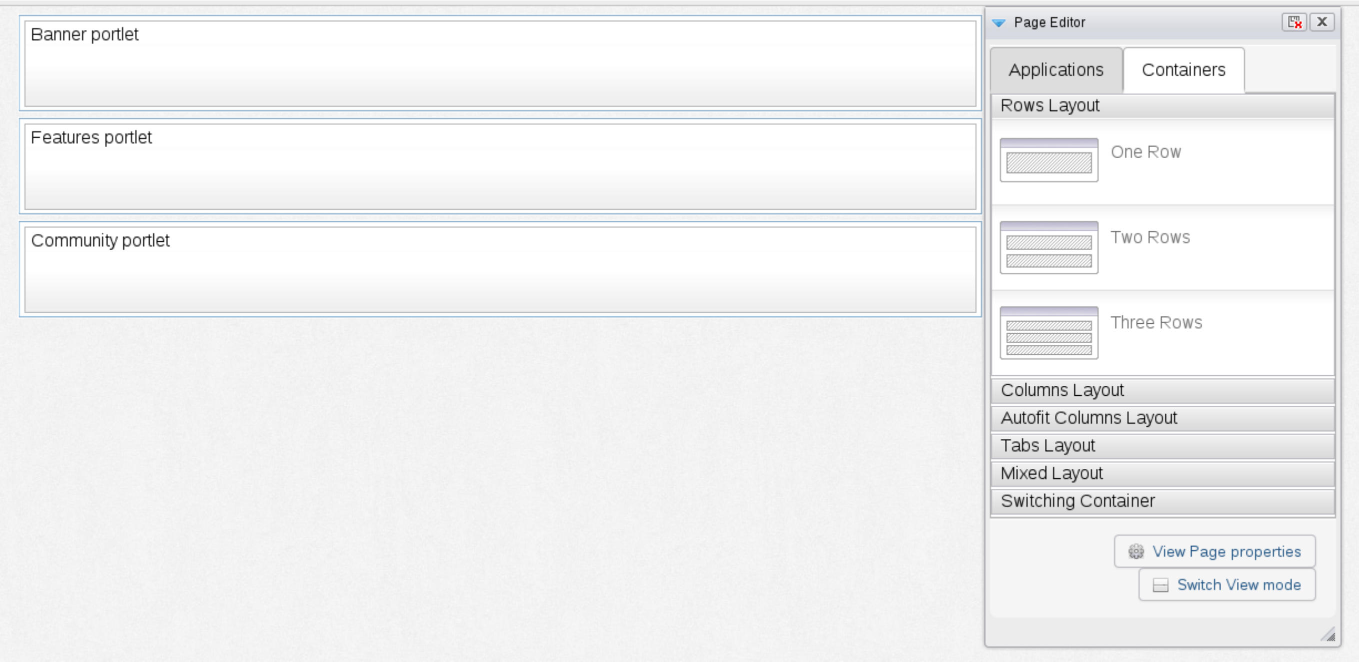


Figure 13.5. Row Layout

It is up to the admin and portlet developer to make sure that the portlets are responsive and are rendered correctly when the screen size changes. It is possible to set the width of the container holding the portlet to a specific width, but this will overflow outside of the normal page size if the browsers width is narrowed beyond this.

Report a bug

13.8. Manually Removing the Mobile Site

To mobile site can also be manually removed by deleting the mobile site and removing the classic site's mobile redirect configuration.

Report a bug

13.9. Deleting the Mobile Site and Configuration

The mobile site is packaged as a portal extension. All the portlets and portal configuration are contained within this extension and it is this extension which creates the mobile site and configures the redirection service for this site. If you do not wish to have the mobile site, the extension can be removed before starting the server.

The extension to remove is located at :

jboss/gatein/extensions/gatein-mobile-integration.ear

Report a bug

Part IV. Accounts, Memberships, Groups, and Users

Chapter 14. Accounts

14.1. Register New Accounts

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

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

Procedure 14.1. Registering a New User Account

1. Click **`Register`** on the Navigation bar to open the Register New Account page.

   Complete the form with the required information:

   User Name

   The name used to log in. This user name must be between 3 and 30 characters long, start with a lowercase letter and end with a lowercase letter or digit. Only lowercase letters, numbers, periods, and underscore characters are allowed in a user name. Click the magnifying glass icon beside the user name to verify whether the user name is available.

   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. This name must be between 1 and 45 characters long.

   Last Name

   The user's last name. This name must also be between 1 and 45 characters long.

   Display Name

   The user's name displayed in portal screens when the user is logged in. The field is optional and if no value is entered, a value in the *[First Name] [Last Name]* format is used automatically.

   Email Address

   The user's email address. This must be in the appropriate format. For example, `username@company.com`.

2. Enter the text displayed at **`Text Validation`** into the empty field below it.

> **Note**
>
> This field can be disabled by an administrator. See Section 14.2, “Captcha Behavior” for more information.

3. Click **Subscribe** to register a new account or **Reset** to remove entered values. The following field validation checks will prevent you from creating an account:

   - The chosen user name already exists or is invalid.
   - The user name contains less than 3 characters or more than 30 characters.
   - The password contains less than 6 characters or more than 30 characters.
   - The Password and Confirm Password fields do not contain identical values.
   - The Email Address format is invalid.
   - The text verification text entered does not match the sample.
   - Fields marked as "required" are left unpopulated.

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

> **Note**
>
> Be sure you enter the chosen email address carefully. This email address is used for user name or password recovery.

Report a bug

14.2. Captcha Behavior

You can set whether Captcha is used to verify whether an account creation event has been initiated by an actual person. The Captcha behavior is enabled by default in the Register Account portlet.

Task: Disable "Register New Account" Captcha Behavior

Complete this task to control how Captcha behaves when a user registers an account.

Prerequisites

- You are logged into the portal using an account with Administrator privileges.

1. Click **Group**+**Administration**+**Page Management**.
2. Click the **Edit Page** icon in the Action column for the portal::classic::register Page ID.

3. Click on the Register Account portlet, and then click the Edit Portal icon (pencil icon) to open portlet properties.

> **Note**
>
> Click the **`Switch View mode`** button in the Page Editor control to switch between WYSIWYG and Object mode.

4. Click the Edit Mode tab (if not already selected), and clear the **`Use captcha`** box to disable Captcha verification for new users.

5. Click **`Save`**, and then click **`Close`** to commit the changes.

6. In the Page Editor control, click **`Switch View mode`** to refresh the portlet.

7. The Register New Account portlet will no longer display the Captcha field.

Report a bug

14.3. Sign In and Sign Out

To enter the portal in private mode, use the previously registered account.

To sign in to a portal, complete the Sign in form. The form contains the following fields and elements:

User name
: The registered user name.

Password
: The registered password.

Remember My Login
: Click this box to authenticate automatically each time.

Forgot your User Name/Password?
: Initiates the process to retrieve a forgotten user name or password.

Sign in
: Sign into the portal with a user name and password.

Discard
: Close the Sign In form without logging in.

See Also:

- Section 14.8, “Account and Password Retrieval”

Report a bug

14.4. Sign In

1. Open the portal by entering the URL into the browser address bar. 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.

3. Type a valid user name and password into the correct fields.

4. Select the Remember My Login check box to automatically return to the portal without signing in again.

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 you will be redirected to the Sign In form. Enter a correct user name and password.

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

See Also:

- Section 14.6, “Remember User Account”

Report a bug

14.5. Sign Out

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

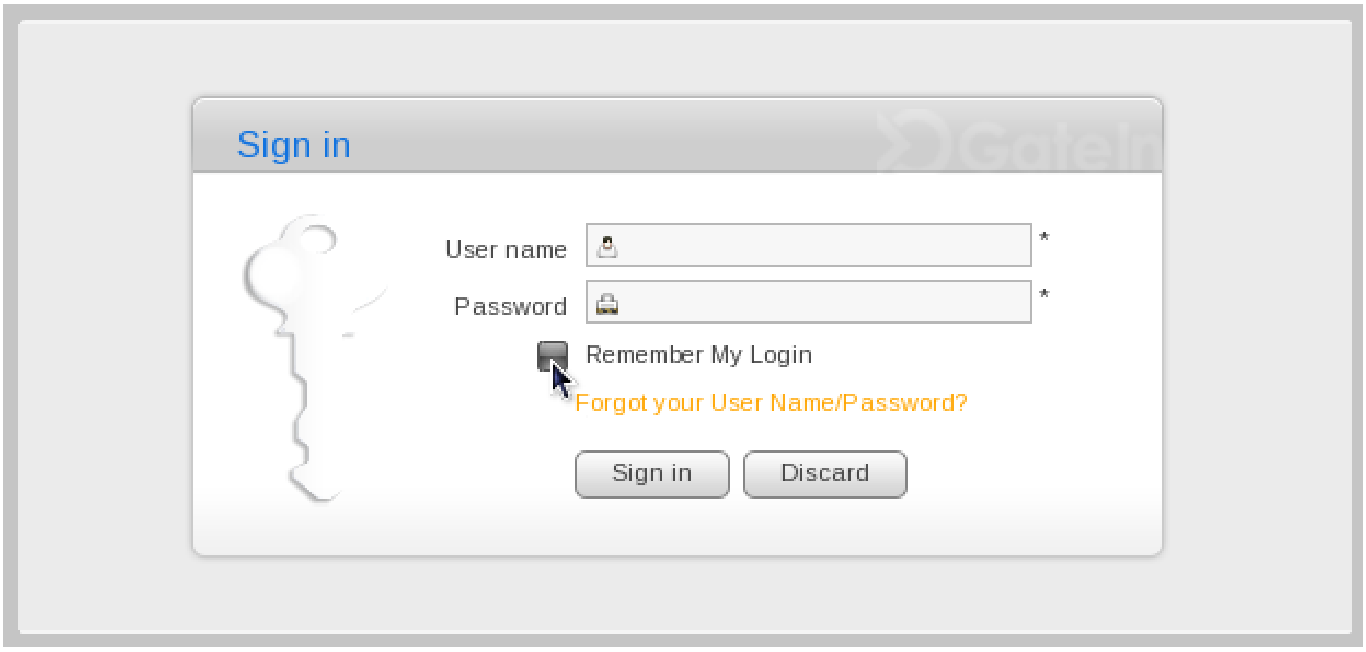
1. In the upper left corner of the screen, hover your cursor over the Red Hat logo. A drop down menu will appear.

2. Click **Sign out**.

Report a bug

14.6. Remember User Account

Users who return to the portal regularly can authenticate automatically to avoid performing an explicit authentication each time they access the portal.



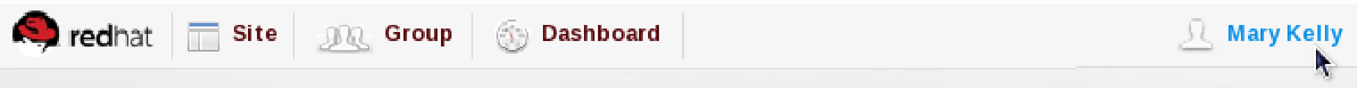
1. Input your registered user name and password.
2. Select the **Remember My Login** check box when logging into the portal at the first time.
3. Click the **Sign in** button to sign in the portal.

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

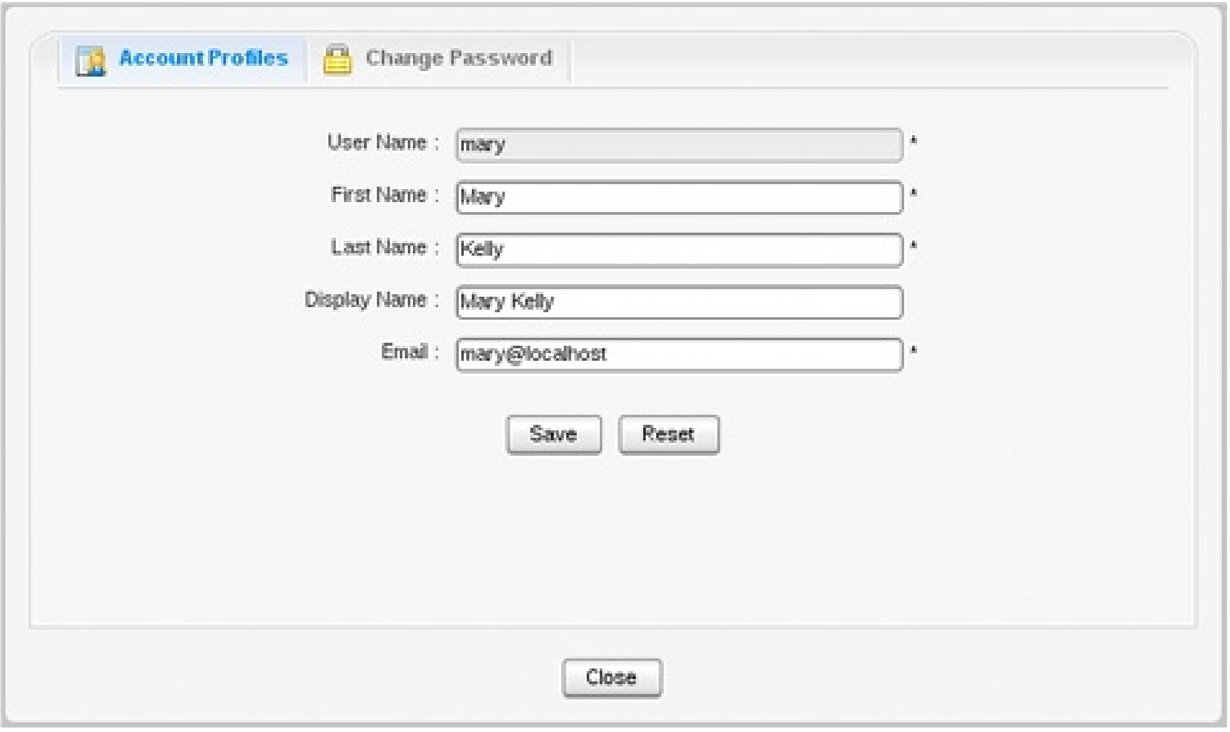
Report a bug

14.7. Change Account Settings

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



The **Account Profiles** form will appear:



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**, **Display Name** and **Email**.

3. Once the desired changes have been made, click the **Save** button to submit them.

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. Reenter your password in the **Confirm New Password** field.

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

Report a bug

14.8. Account and Password Retrieval

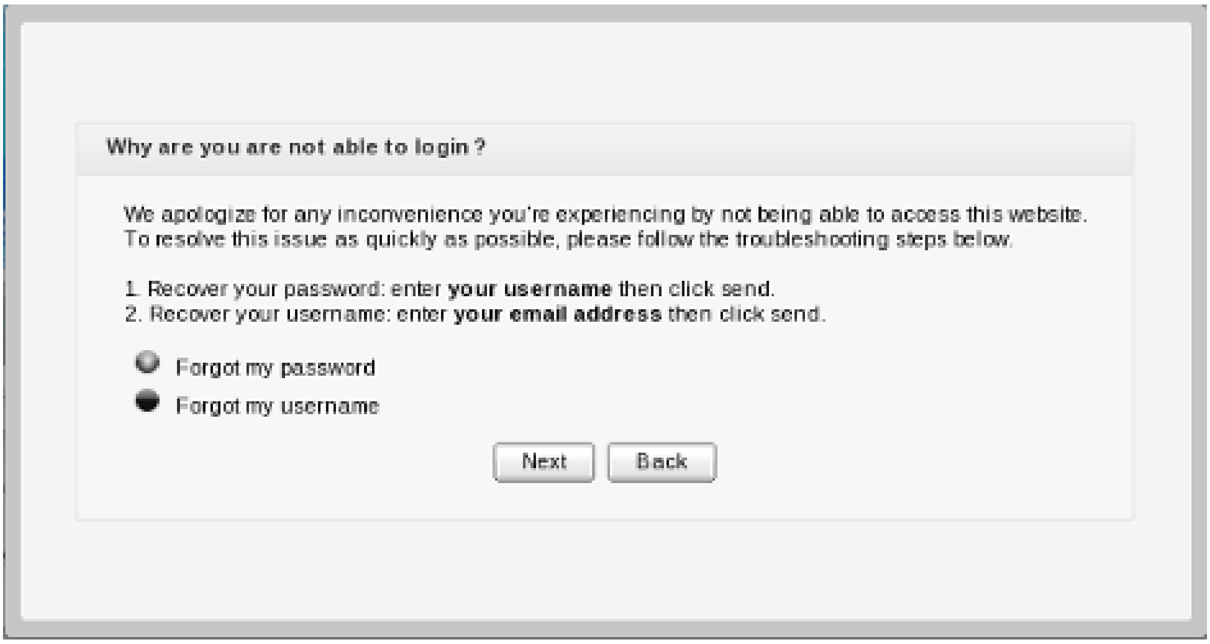
You can recover your user name or password if you forget them by following these steps:

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

2. The next screen offers two options:

   - **Forgot my password**.

   - **Forgot my username**.



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

After you submit the form an email will be sent to your email address to assist you.

If you forgot your password you will be sent a link to a password reset facility. Your original password will not be valid after this email is sent.

Important

If you receive an error message such as "Can't send email", verify your email settings in the **`configuration.properties`** file.

See *Email Service Configuration* in the *Installation Guide* for more information about configuring the email service.

Report a bug

Chapter 15. Memberships

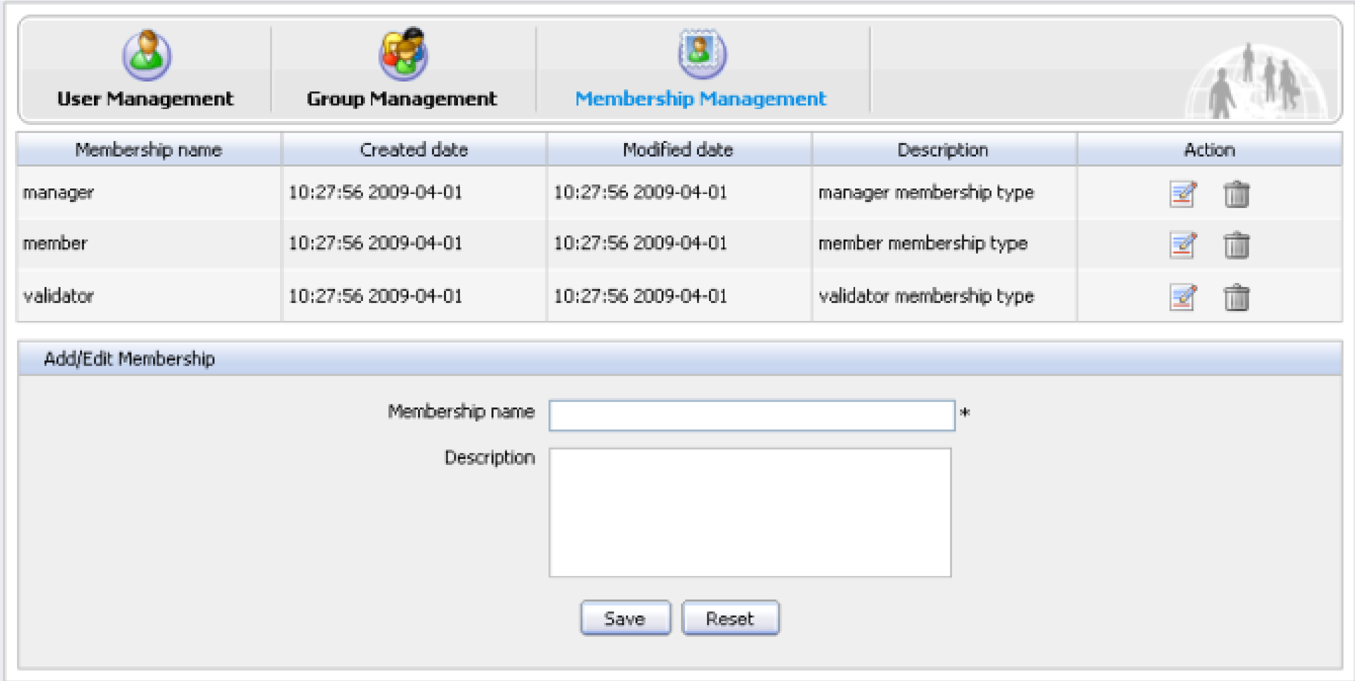
15.1. Manage memberships

The role of a user in a specific group is managed using memberships.

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

Mouse over **Group** on the Toolbar. Highlight **Organization** and select **Users and Groups Management**. Select the **Membership Management** tab.

This tab remembers the last action taken by a user in this page. Clicking **Reset** will clear any legacy details.



Report a bug

15.2. 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 and it must be between 3 and 30 characters.

2. Click the **Save**

Report a bug

15.3. Edit a membership type

1. Click the edit icon in the Action column.

2. Make the desired changes to the description.

3. Click **Save**

Report a bug

15.4. Delete a membership type

1. Click the trash icon in the Action column.

2. Click **OK**

Report a bug

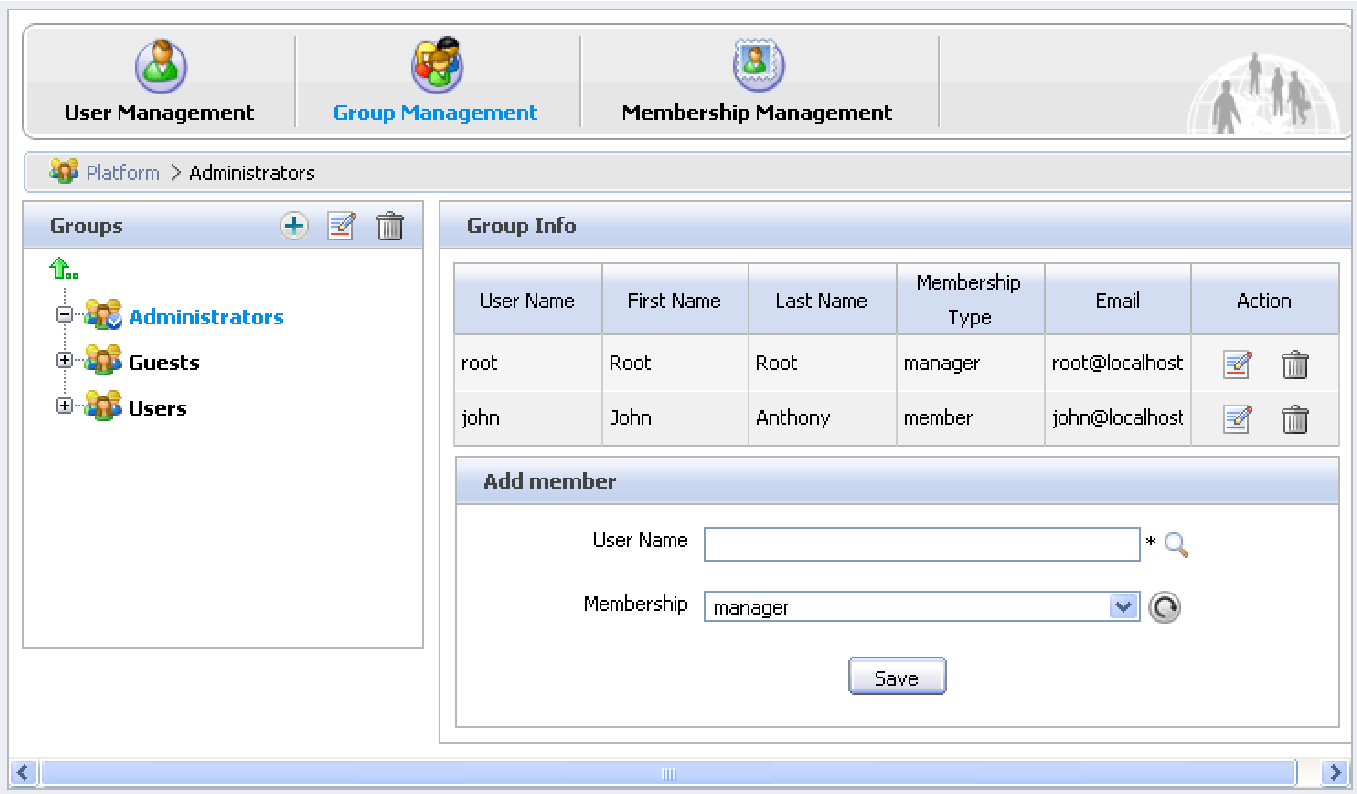
Chapter 16. Groups

16.1. Manage groups

Mouse over **Group** on the Toolbar. Highlight **Organization** and select **Users and Groups Management**

Select the tab **Group Management**

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.



Report a bug

16.2. Add a New Group

1. First choose where in the existing group structure you want the new group to be created. You may navigate up the tree by clicking on the green vertical little arrow at the top of the tree. The current path is displayed in the path bar.

2. Click **Add New Group**.

   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 0 to 255 characters is allowed.

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

4. Click **Save**

Report a bug

16.3. Edit a group

1. Find the group in the existing tree and click on the label

2. Click the edit icon to display the **Edit Selected Group** window.

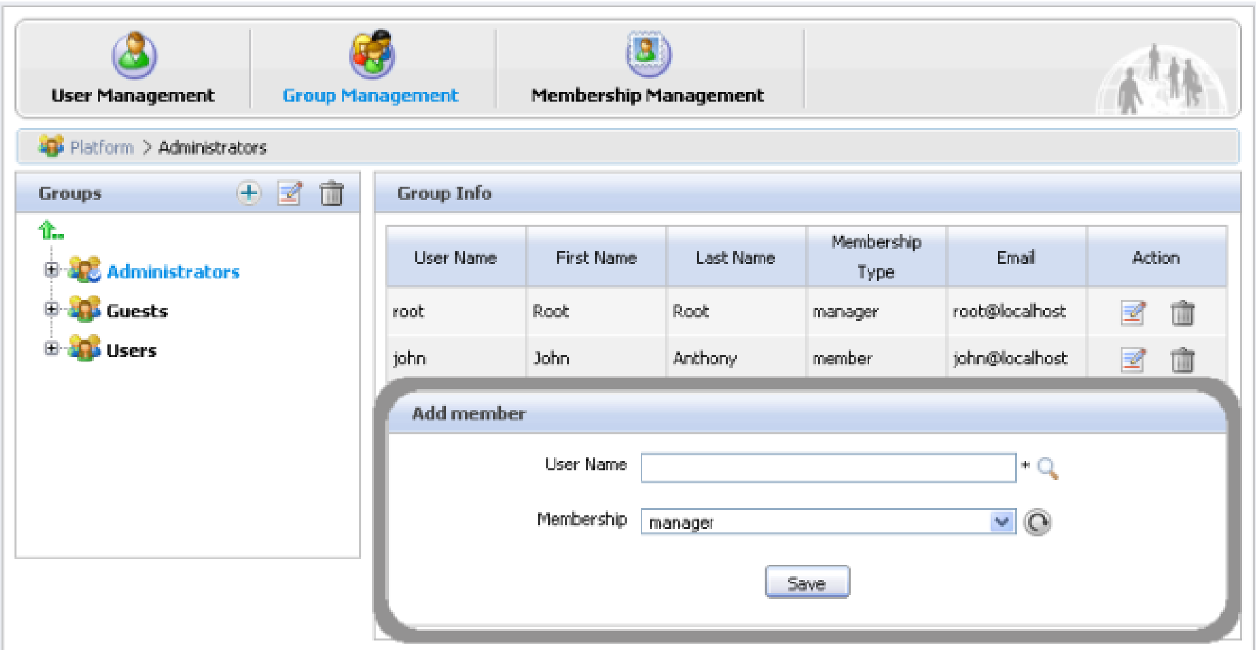
3. Make the desired changes in the appropriate fields. You can not change the Group Name, however you may change to the **Label** field. You are also able to edit the **Description** field.

4. Click **Save**

Report a bug

16.4. Add a new user to a group

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



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

   Select the check box next to the user name and then click **Add**

3. Select the membership appropriate for this user. If the desired membership does not appear, click on the refresh icon to get the latest list.

4. Click **Save**

See Also:

- Section 17.5, “Search for users”

Report a bug

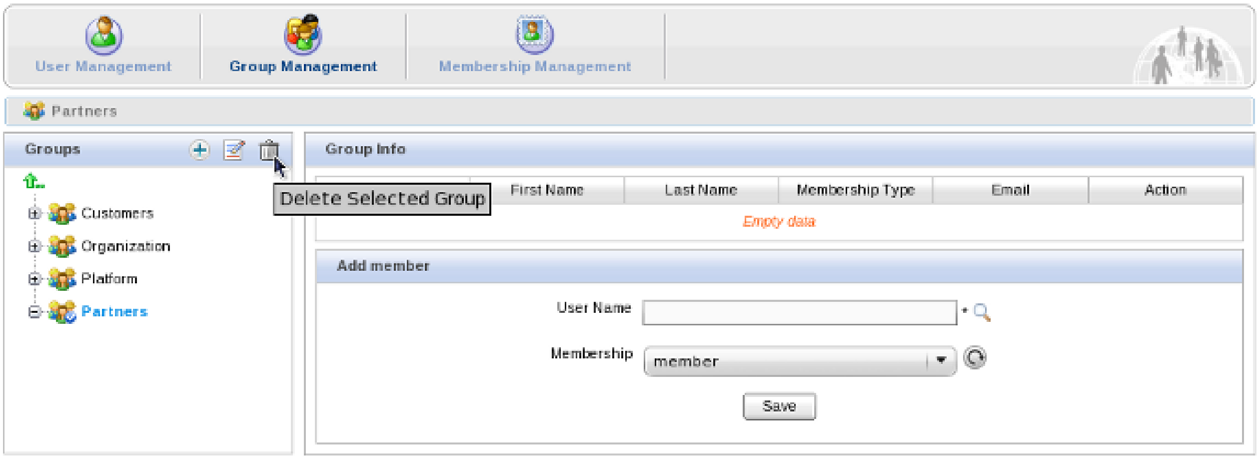
16.5. Edit the user membership in a group

1. Click the edit icon in the Action column.
2. Select another membership.
3. Click **Save**.

Report a bug

16.6. Delete a group

1. Find the group in the tree
2. Click the trash icon.



3. Click **OK**.

Report a bug

Chapter 17. Users

17.1. Manage Users and Groups

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

Report a bug

17.2. Roles

Effective user management relies on understanding the rights and responsibilities of the various user roles available.

Core Portal Memberships

- Member
- Manager
- Validator

Table 17.1. Role Attributes of Example Users

User	Roles
root	manager:/platform/administrators,member:/platform/users,member:/organization/management/executive-board
john	member:/platform/administrators,member:/platform/users,manager:/organization/management/executive-board
mary	member:/platform/users
demo	member:/platform/guests,member:/platform/users

Roles

manager:/platform/administrators

This role is for users to have access and edit administrators pages. Examples are the New Account, Community Management, Registry, Page Management, New Staff, Organization Management and WSRP Admin pages.

member:/platform/administrators

This role is similar to the manager role above. The main difference is that it does not have access to the administrators pages, but can access and edit everything that falls under the **`*:/platform/administrators`** pages.

***:/platform/administrators**

This role has edit permissions for everything. This includes; the Home Page, Group Navigation, Portal Navigation, Register and Site Map (in the *classic* portal). This membership also has permission to create and manage portals and has full permission with group navigation.

member:/platform/users

This role allows standard users to log in.

***:/platform/users**

This role has access to portal toolbars, dashboard, default gadgets (todo, rss, calculator and calendar) and basic portlets (sitemap and iframe). In general it can access but cannot edit these areas.

member:/organization/management/executive-board

This role can edit New Staff and Organization Management pages.

member:/platform/guests

Members of this role can access the Register and Site Map pages.

***:/platform/web-contributors**

This role can edit the Contact Us page, has taxonomies permission to read, add nodes, set and remove properties in *acme*, *classic* and *events* and is the newsletter marketing moderator, general moderator and subscription redactor. They have access to the **`ManageDrivePlugin`** for Collaboration and Events. This role also has access to toolbars.

***:/platform/administrators**

This role grants access to the edit mode drop-down in toolbar visible (**`WCMAdminToolbarPortlet`**)

validator:*

This role is not used. It can be removed if it is present in your instance.

Mandatory groups (groups that can not be deleted)

- /platform/administrators
- /platform/users
- /platform/guests

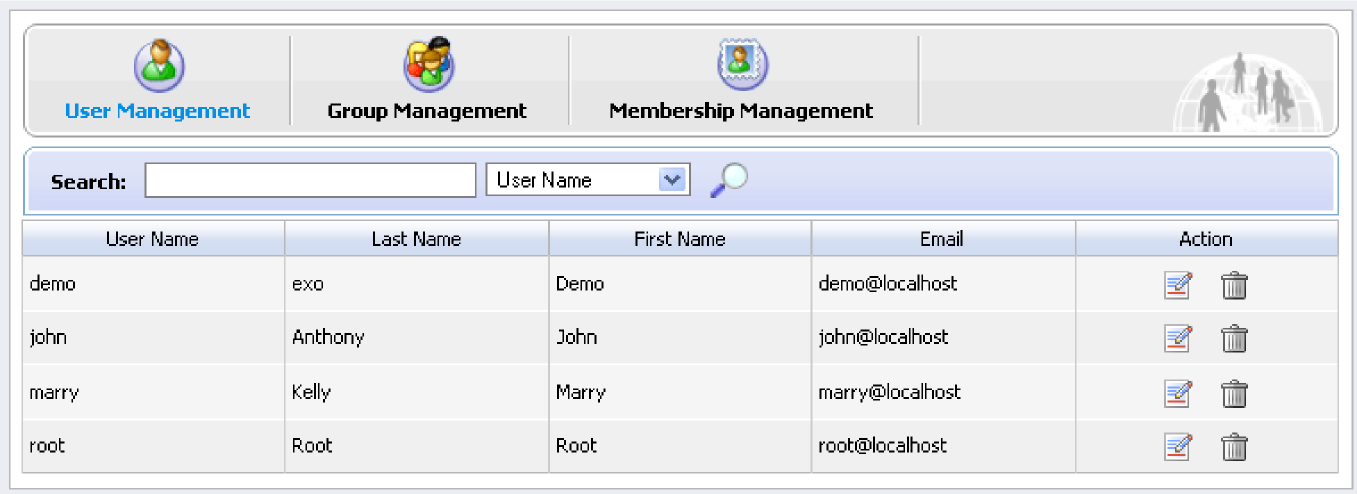
Mandatory membership types (Membership type that can not be deleted)

- member

Report a bug

17.3. Manage users

Mouse over **Group** in the Toolbar. Highlight **Organization** and select **Users and Groups Management**



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.

Report a bug

17.4. 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 on **New Staff**.

   The **New Staff** window will open:

   This window has two tabs; **Account Setting** and **User Profile**.

3. To create a new user, all fields on the **Account Settings** tab that are marked with an asterisk must be filled in. The **Display Name** field is optional and when left blank, a value in format *<First Name> <Last Name>* is used.

   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.

Report a bug

17.5. Search for users

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

1. Mouse over **Group** in the Toolbar. Highlight **Organization** and select **Users and Groups Management**.

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

3. Type in a partial/full string which identifies the user record being searched. The * character can be used as a wild-card.

4. Click the magnifying glass icon to begin the search.

Report a bug

17.6. Edit a user

1. Locate the user you wish to edit.
2. Click the edit icon (next to the trash icon).
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**, **Display Name** and **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 between 6 and 30 characters.

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 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**.

Report a bug

17.7. Delete a user

1. Locate the user you wish to delete

   Click the trash icon in the Action column

2. Click **OK** to confirm.

Report a bug

Revision History

Revision 6.2.0-3	**Mon May 11 2015**	**Aakanksha Singh**

Prepared guide for 6.2.0 GA.