



eXo Portal

version 2.5.9

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# 1 PREFACE

## **1.1 Overview**

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

The eXo Project grew into a company in 2003, as a response to customer demands. We can do this because we release our code in the open environment. It's how the DoD found us, when we were just university students hacking away, and it's how we choose to do business with our customers.

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

And along with the Corporate growth, eXo Portal is really a core application which is considered as the most vital foundation for the development of many successive products in the market. Based on the Enterprise 2.0 direction, eXo Portal 2.5 is an electronic portal for businesses, enabling users to access many personalization and collaboration applications wherever and whenever. Strong flexibility and customization of eXo Portal 2.5 really facilitate the birth of many useful applications with a variety of rich utilities, contributing to the immense communication, easy transaction, user-friendly access, and collaboration simplification, etc, in such easier and more interactive manner.

## **1.2 Purposes of the Guide**

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

The information provided in the guide will focus on the followings:

- Define the basic concepts in the eXo Portal.
- Show the main instructions of the eXo Classic Portal.
- Provide step-by-step instructions to master the eXo Portal.

## **1.3 References**

### **Document**

- eXo Portal Administrator Guide v2.5.9

### **Information**

- eXo Platform Home Page: <http://www.exoplatform.com/portal/public/website/>
- eXo Platform Wiki: <http://wiki.exoplatform.com/xwiki/bin/view/Main/>

### **Support**

- Forums: <http://forums.exoplatform.org>
- FAQ: <http://faq.exoplatform.org>

## 2 GLOSSARY

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### **2.1 Portal**

Portal is a Web application that provides many services to users and enterprises with an interactive and consistent look and feel. Users and administrators are able to integrate information, people and processes via a web-based user interface.

The framework facilitates the content and applications aggregation with the flexible management and personalization options.

### **2.2 Portlet**

Portlet is a small web-based application. Also, it may be understood as a pluggable user interface component that is managed and displayed in a portal. The portal generates fragments of markup codes that are aggregated into a portal page. Typically, a portal page is displayed as a collection of non-overlapping portlet windows, where each portlet window displays a portlet.

The contents generated by a portlet can vary among many users, depending on the user preferences for that portlet.

The eXo Platform is intended to create standard portlets that can be plugged into any portal.

Portlets can be divided into two following types:

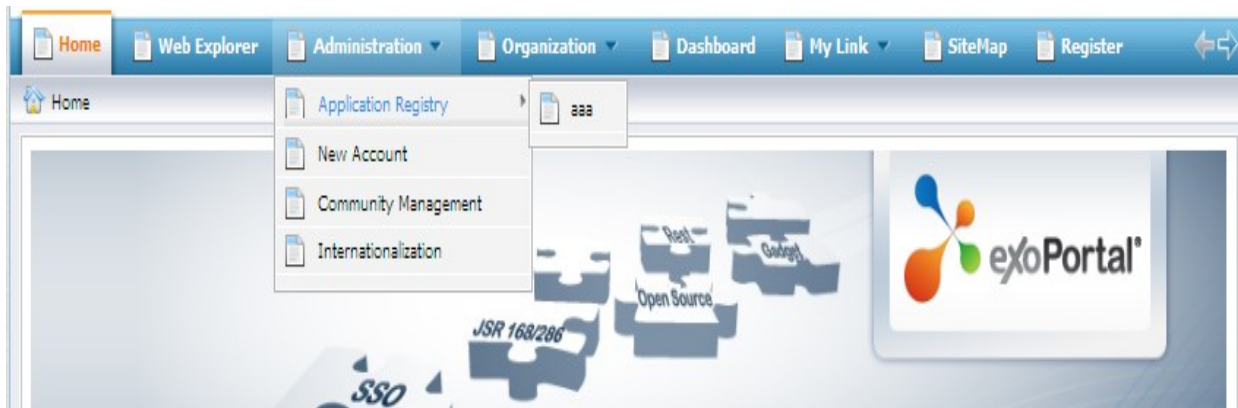
- Functional Portlet
- Interface Portlet

### **2.3 Navigation**

The navigation is composed of a number of nodes (menus) that helps users visualize the site structure and provides hyperlinks to move from one page to another quickly. Each node contains an internal name and a label which is shown on the menu. For any node, you can define either sub-nodes. The horizontal menu at the page top is called a navigation bar. The eXo Portal's navigation is established based on three levels: portal level, group level and user level. On each level, any node can be defined. The navigation structure of one particular user is made up of portal navigation nodes (that are valid to all users), the nodes of all groups the user belongs to and his individual nodes. The users' and groups' nodes are valid for all portals that are defined on the same



eXo Portal server.



### 2.3.1 Portal Navigation

This navigation level is used to keep the links to pages of a portal. Each portal has only one navigation structure and it is automatically generated when a portal is created. Only users who have the edit permission on a portal can add nodes on this navigation level.

The portal navigation's name looks like: portal:[portal name]'s nav

Let's suppose that a portal navigation's name is: "portal:classic's nav", in which:

- ✓ 'portal' is the navigation level, it means that navigation nodes are defined for all users of a portal.
- ✓ 'classic' is the name of portal.
- ✓ 'nav' stands for 'navigation'.

### 2.3.2 Group Navigation

All registered users are organized into groups. There is a navigation keeping the links to all pages of each group, called a group navigation. The group navigation is created manually by users who have the highest right in a group. Before adding nodes or creating pages for a group, you must create the group navigation. Also, there are nodes that are only applied to those members who have certain memberships.

The group navigation's name looks like: group:[group name]'s nav.

Let's suppose that the group navigation name is: group:platform/administrators's nav, in which:

- ✓ 'group' is a type of navigation, it means that the nodes are defined for a group.
- ✓ 'platform/administrators' is the group path.
- ✓ 'nav' stands for 'navigation'.

### 2.3.3 User Navigation

Furthermore, each user has its own navigation nodes. The user navigation is created along with the user registration and deleted along with the user deletion. By default, the user navigation is empty.

The user navigation's name has format: user:[user name]'s nav

Let's suppose that the user navigation name is: user:john's nav, in which:

- ✓ 'user' is a navigation level that navigation nodes are defined for one individual user.
- ✓ 'john' is the name of user.
- ✓ 'nav' stands for 'navigation'.

## 2.4 Gadget

A gadget is a mini web application running on a platform that a user can integrate in the web page.

The eXo Portal supports some gadgets such as:

- **Calculator:** This is the coolest calculator for your page. This mini-application lets you perform most basic arithmetic operations. This gadget also offers cool skins to make your page more lively.
- **Calendar:** The cool calendar is to keep track of date. You also can switch easily between daily, monthly and yearly views and change the skin as you like.
- **Todo:** This mini-application helps you organize your day and work group. It is designed to keep track of your tasks in a convenient and transparent way. You can highlight tasks with different colors.

## 2.5 Access Mode

The eXo Portal has two modes:


- **Public mode:** this mode is for guest users (visitors) who have not registered yet and it is not required to sign in, so they can only visit the public pages in a portal. Visitors can also

register in order to get an account. After having registered, they can use the private mode and have to contact their administrators to get more rights or the group manager if they want to become a member of that group.

- **Private mode:** this mode is for registered users who will apply their usernames and passwords to sign in. This mode supports users in taking many actions such as: managing private resources (creating private pages, editing or deleting them), "borrowing" pages from others by creating hyperlinks to existing pages, changing the language for individual needs, managing private information.

## 2.6 Preview Mode

In the preview mode, you can only view and can't edit. You can see this mode when you click the

Preview Page icon  at *step 3* to create a page by wizard or edit a page by wizard.

## 2.7 Layout mode

In the layout mode, you are provided with some layout templates of portal or the page and you can use these templates to edit a portal or a page.

## 2.8 Permission

Permission is one of the most important factors on a portal. Permission settings control what users can or can not do within the portal and set by administrators.

### 2.8.1 Permission types

Permission types define what a user can do with two permission types available as follows:

**Access Permission:** allows users to utilize portal contents (signing in, viewing contents, dragging and dropping portlets into a page, etc). Access permissions can be set for a list of groups.

**Edit Permission:** allows users to change portal contents (changing portal or page information, deleting a portal/page). The edit permission is set for only one group at a time.

By default, **root** is set as the super user or the administrator on the eXo Portal; he can do everything while the others must get the appropriate rights (permissions) at first.

Rights in the eXo Portal are not assigned to a single user but to a users group with a specific

membership type.

Similarly, the permission structure is always established as follows: [membership type]:[group path].

For example: manager:/platform/administrators. It means the right is set for users who are “manager” of the group “administrators”. “Platform” is the parent group of “administrators”.

Seemingly, groups are managed in accordance with a hierarchy structure; but in fact, a sub- group does not have any inheritance from the parent group.

For example: we have a group structure as follows:

- + platform
  - administrators
  - guest
  - user

If users in the group “platform” can perform a function A, it does not mean that users in “administrator” or “guest” can do function A. The roles of users in groups are independent.

## 2.8.2 Permission levels

Permission levels specifies where the users's permission types can be applied into the portal. Portal offers three permission levels as follows:

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

**Page:** The page permission level restricts the users to several particular pages. Users are only able to see and/or edit pages they have been given access to, depending on each permission type assigned to them.

**Portlet:** The portlet permission level allows users to create a page through dragging and dropping portlets into a page. Some portlets are only used for administrators while some are for individuals; thus, administrators need to set proper access permissions for each specific group.

Permission types and levels can be effectively implemented to control who can do and what can be performed within the portal. For more information on setting permissions, refer to the section 'Manage Permissions'.

## 3 PORTLET

### 3.1 Functional Portlet

Functional Portlets support all functions of a portal. They are built into the portal and accessed via toolbar links when the portal-related tasks are performed.

#### 3.1.1 Account Portlet

This portlet allows users to register a new account. In other words, it is also used to support users in choosing their preferred languages for displaying the Portal interfaces.

- This portlet includes two information parts:
  - **Account Setting:** It includes information about a new account such as: User Name, Password, Confirm Password, First Name, Last Name, Email Address.

**Note:**

*You should enter your email address exactly because you can recover your user name or password when you forget them by using this email address.*

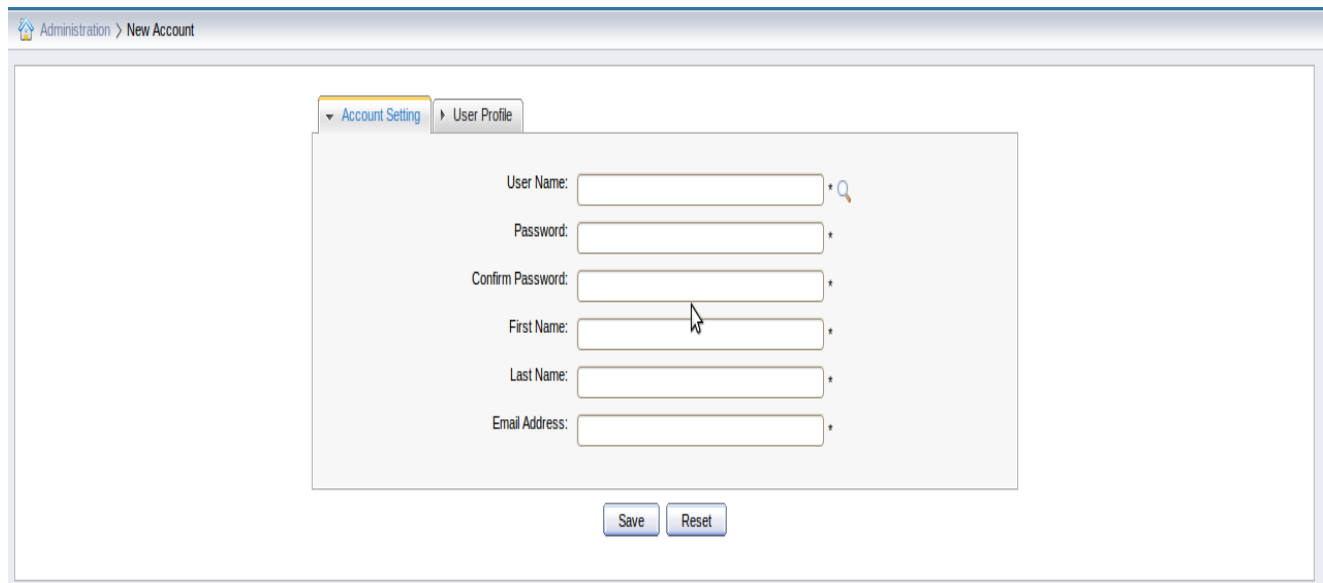
The screenshot shows a web application interface for creating a new account. At the top, there is a breadcrumb trail: "Administration > New Account". Below this, there are two tabs: "Account Setting" (which is active and highlighted with a blue border) and "User Profile". The "Account Setting" tab contains a form with the following fields: "User Name:" with a text input and a small magnifying glass icon; "Password:" with a text input and an asterisk; "Confirm Password:" with a text input and an asterisk; "First Name:" with a text input and an asterisk; "Last Name:" with a text input and an asterisk; and "Email Address:" with a text input and an asterisk. At the bottom of the form, there are two buttons: "Save" and "Reset".

Illustration 1: The Account Portlet form

- **User Profile:** It includes personal information of a new account such as: User Profile, Home Info, Business Info.

The screenshot displays the 'User Profile' tab in the eXo Portal. The main area contains a form with the following fields: 'Given Name', 'Family Name', 'Nick Name', 'Birthday', 'Gender' (a dropdown menu currently showing 'Male'), 'Employer', 'Department', 'Job Title', and 'Language' (a dropdown menu currently showing 'English'). To the right of the form is a sidebar titled 'Personal Info' which includes three buttons: 'Profile' (with a person icon), 'Home Info' (with a house icon), and 'Business Info' (with a briefcase icon). Below the sidebar, there is a graphic of a document with a blue arrow pointing towards it. At the bottom center of the form area, there are two buttons: 'Save' and 'Reset'.

Illustration 2: The User Profile tab

**Note:**

To choose the preferred language for displaying the Portal interface, do as follows:

There are two modes to set the displaying language of a user.

- **Public Mode:** The display language of this mode depends on the browser language in use.
  - If you set the browser language not supported by the Portal, the display language will be the language set on the Portal.
  - If you set the browser language supported by the Portal, the display language will be the language set on the browser.
- **Private Mode:** The display language of this mode belongs to the language set by each user when he/she registers.
  - When you sign in by a default account (root, john, demo, marry): the display language of these users are none, so it will belong to the browser language. If you change a value in the *Language* field in the User Profile tab (only the default user: root and john can change this value by accessing the Management page: Go to Organization--> Management page), your display language will be the set value.
  - When you sign in by a newly registered user: by default, your display language is English. However, if you set the another language in the *Language* field in the User

Profile *tab when you register a new account, your display language will be the set language.*

### 3.1.2 Organization Portlet

This portlet is used to manage user information, users groups and memberships. The form of this portlet is shown like:

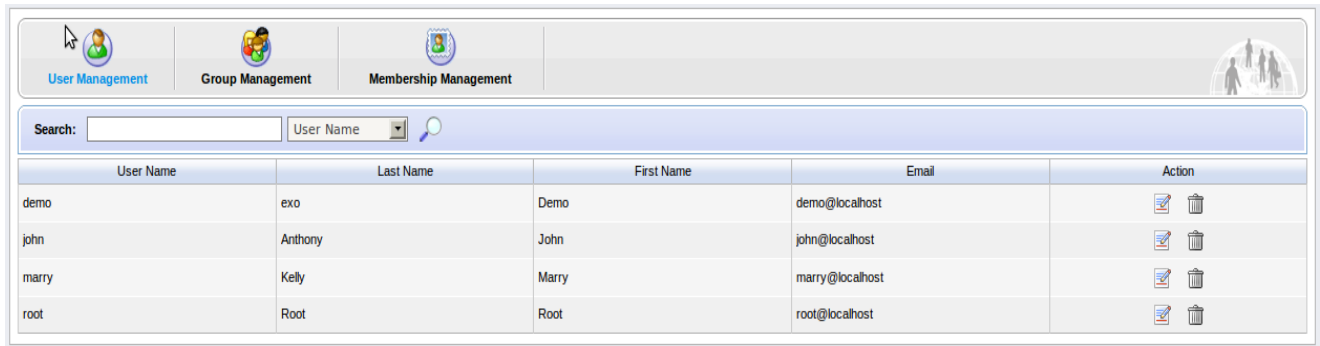
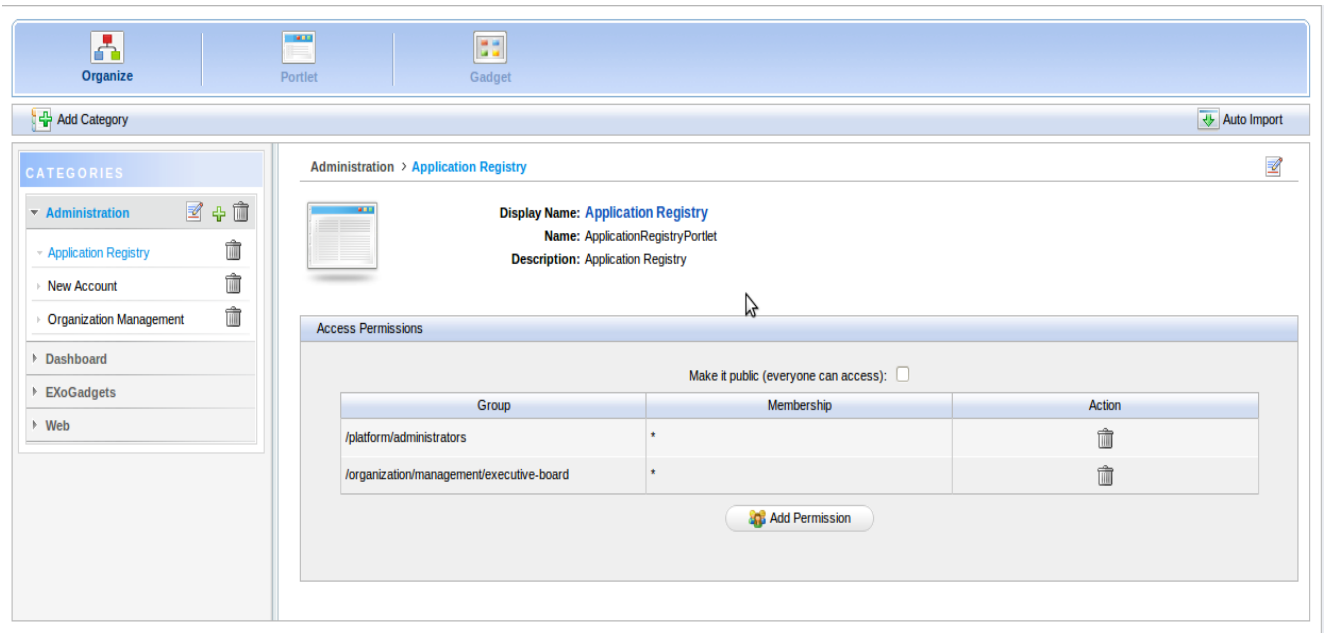


Illustration 3: The Organization Portlet interface

- **User Management:** This tab allows users to edit, delete, search and view existing users.
- **Group Management:** This tab allows users to view, add new, edit and delete a group of users.
- **Membership Management:** This tab is used to add, edit and delete memberships.

### 3.1.3 Application Registry Portlet

This portlet is used to manage different application categories. You can add, edit, set permissions, or delete a category and applications. The form of this portlet is shown as below:



**Illustration 4: The Application Registry Portlet interface**

This portlet includes the following functions:





















- Organize portlets/gadgets into different categories such as: creating a new category, importing default portlet categories, adding a portlet/gadget into a specific category, adding permission to a portlets category, etc.
- List portlets and view detailed information regarding to a specific portlet.
- Manage gadgets: add a remote gadget, create a new gadget or delete a gadget from the list.

### 3.1.4 Internationalization Portlet

This portlet is used to define a word or a phrase of a current language to an expected language:



Administration > Internationalization

Name	Language	Action
locale.navigation.group.organization.management.executive-board	ar	 
locale.navigation.group.organization.management.executive-board	en	 
locale.navigation.group.organization.management.executive-board	fr	 
locale.navigation.group.organization.management.executive-board	vi	 
locale.navigation.group.platform.administrators	ar	 
locale.navigation.group.platform.administrators	en	 
locale.navigation.group.platform.administrators	fr	 
locale.navigation.group.platform.administrators	vi	 
locale.navigation.group.platform.guests	ar	 
locale.navigation.group.platform.guests	en	 

Total pages: 4 << < 1 2 3 4 > >>

**Search Resource**

Name

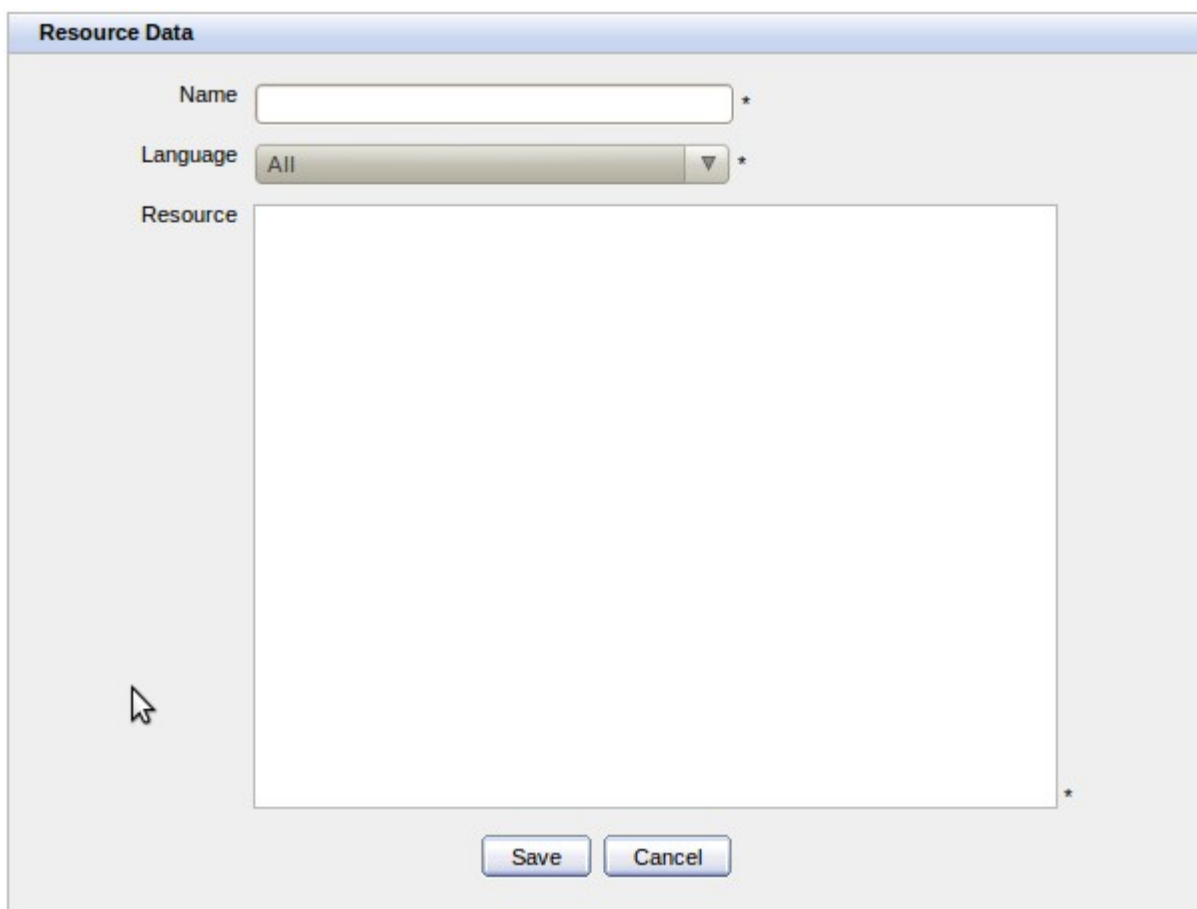
Language All ▼

Illustration 5: The I18n Portlet form

Each resource supports a language. So, you can define a word or a phrase to the supported language.

**Add a new Resource:**

**Step 1:** Select the **New Resource** button in the **I18n Portlet** form. The **Resource Data** form will appear:



The screenshot shows a web form titled "Resource Data". It contains three input fields: "Name" (a text box), "Language" (a dropdown menu currently showing "All"), and "Resource" (a large text area). Each field is followed by an asterisk (\*), indicating that these fields are required. Below the input fields are two buttons: "Save" and "Cancel". A mouse cursor is visible near the "Resource" text area.

Illustration 6: The Resource Data form

**Details :**

- Name:** The name of Data Source. (\*Required).
- Language:** The language which this data source will support. (\*Required).
- Resource:** The word or the phrase which you want to define. (\*Required)
- For example, we define:

Portal.classic.home = Trang chu

Portal.classic.webexplorer = Trinh duy et web


So, when you change the current language to the another supported by the data source, the phrase: "Portal.classic.home" in the current language will be changed to "Trang chu" in the supported language. Similarly, the phrase "Portal.classic.webexplore" in the current language will be changed to "Trinh duy et web" in a supported one.


**Step 2:** Enter values into the required fields.

**Step 3:** Click the **Save** button to accept adding a new resource or the **Cancel** button to quit.

Illustration 7: The Search Resource form

**Search Resource:** The **Search Resource** form displays directly on the portlet: Enter a resource name which you want to search and select the supported language. Then, click the **Search** button to perform searching and display the expected Data Sources list.

**View a Data Source:** Click the icon  corresponding to the resource which you want to view. On the view form, you also can modify the resource-related information by clicking the **Edit** button. You only can change the **Resource** field, then click the **Save** button to accept changes or click the **Cancel** button to quit.

**Delete a Data Source:** Click the icon  corresponding to the resource which you want to delete. A confirmation message will appear. Click the **OK** button to confirm deleting or the **Cancel** button to quit.

## 3.2 Interface Portlets

Interface Portlets constitute the Portal interface. The group of Interface Portlets includes: Banner Portlet, Breadcrumbs Portlet, Browser Portlet, Console Portlet, Footer Portlet, HomePage Portlet, IFrame Portlet, Navigation Portlet, and SiteMap Portlet.

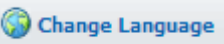
### 3.2.1 Banner Portlet


This portlet is considered as the welcome gateway of a portal. It contains the organization's slogan, logo and icon:



Illustration 8: The Banner Portlet interface

Besides, it also includes two functional buttons:

The **Change Language** button  allows you to set the display language. You can select one of the supported languages in the list.

The **Sign out** button  allows you to exit from the portal.

## 3.2.2 Breadcrumbs Portlet

This portlet is used to display the navigation path of the selected page:

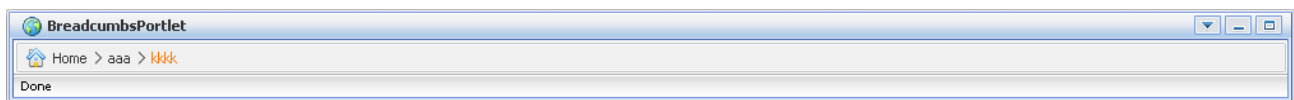


Illustration 9: The Breadcrumbs Portlet interface

## 3.2.3 Console Portlet

This portlet is used as a console to run Java Script commands:



Illustration 10: The Console Portlet interface

## 3.2.4 Footer Portlet

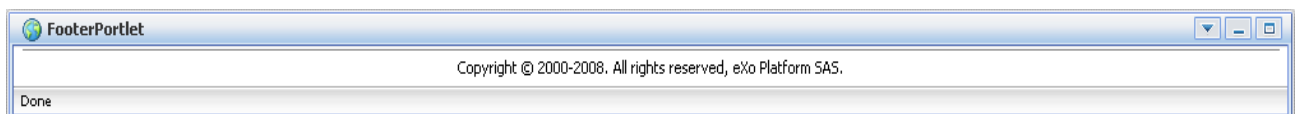


Illustration 11: The Footer Portlet interface

This portlet provides the portal footer. The footer may contain any text or image that is displayed at the portal bottom. The footer can provide information regarding to any

author/institutional sponsor, revision date, copyright, comment form, and navigational link.

### 3.2.5 HomePage Portlet

This portlet is used to provide a homepage portlet on the portal. The homepage is the main page of portal. This is a default page which is displayed at first when you visit the portal.



Illustration 12: The HomePage Portlet interface

### 3.2.6 IFrame Portlet

This portlet is used to create IFrame elements for a site. IFrame is an HTML element which can embed a different HTML document into a HTML document. So the embedded document is displayed inside a sub-window of the browser window. This does not mean the full inclusion, the embedded document is independent and both documents are treated as separated documents.

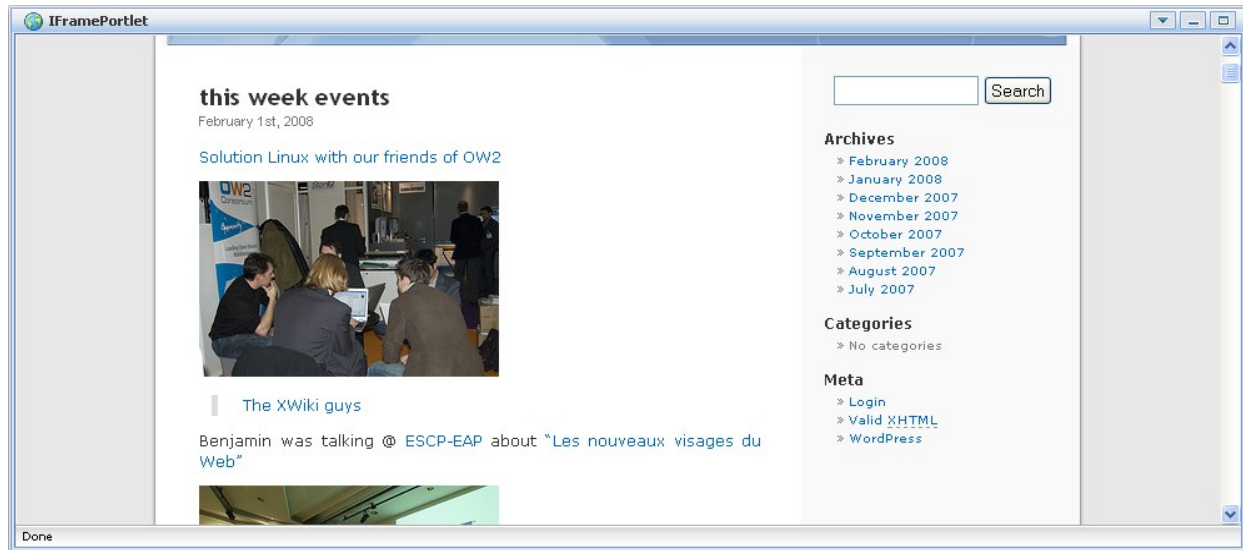


Illustration 13: IFramePortlet Portlet

### 3.2.7 Navigation Portlet

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

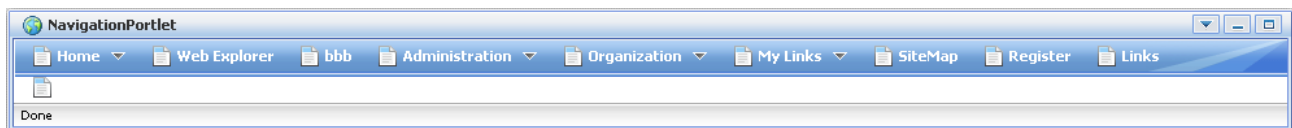


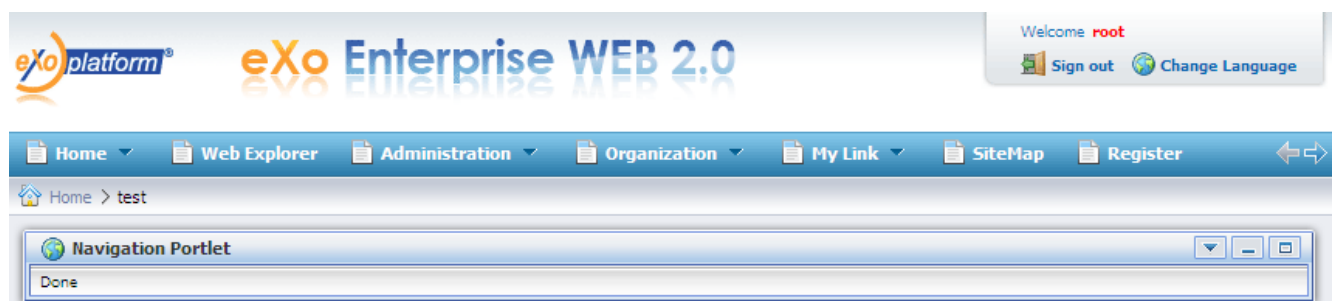
Illustration 14: The Navigation Portlet interface

**Note:**

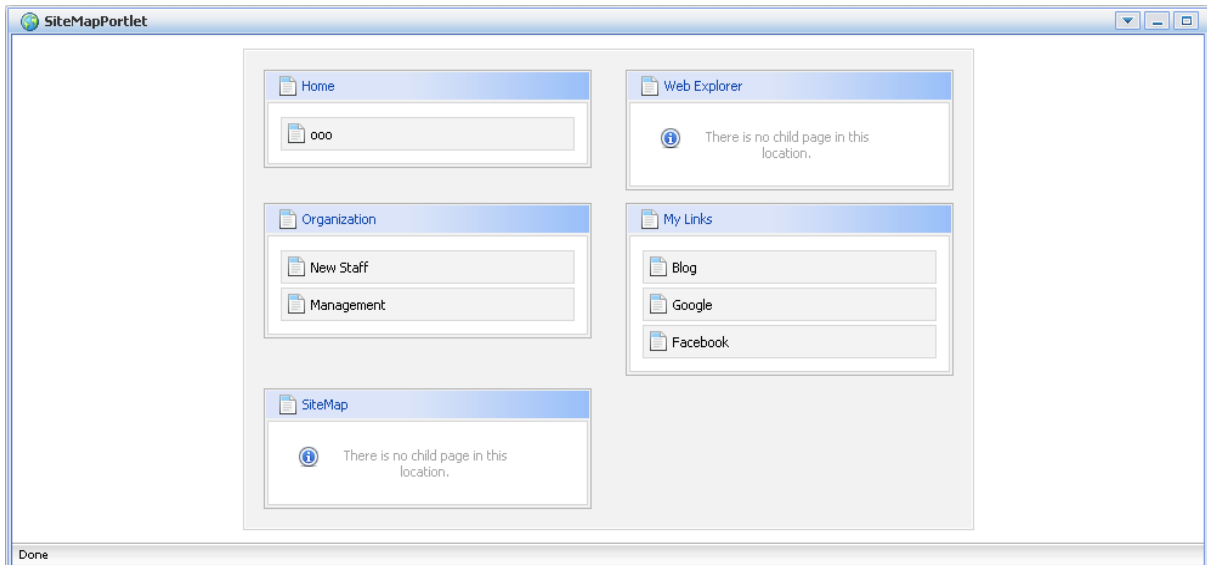
*When a new page that contains this portlet is created:*

*In the Preview mode: the portlet will be viewed as a normal page like above.*

*In the Save mode: the Navigation portlet will not be displayed normally when you open the page containing this portlet because only the portal navigation can be shown like below. It means that two navigations can not be shown concurrently.*



## 3.2.8 SiteMap Portlet



**Illustration 15: The SiteMap Portlet interface**

This portlet is used to provide a sitemap page view of portal. A sitemap is a graphical representation of that portal architecture. It lists pages on a website, which is typically organized in a hierarchical structure. This helps visitors navigate pages on the portal easily.

### 3.2.9 Browser Portlet

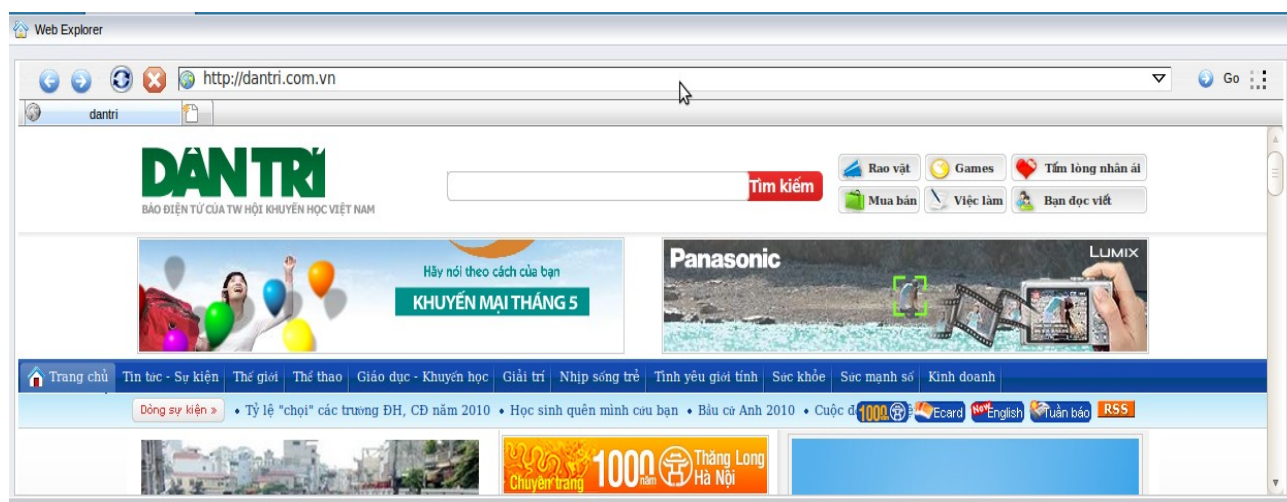


Illustration 16: The Browser Portlet interface

This portlet provides a web-browser-like application for users. It allows users to connect to other sites over Internet.

### 3.2.10 Dashboard portlet

This portlet is used for hosting mini-applications known as gadgets. The dashboard uses a variety of graphical effects for displaying, opening, and using gadgets. Gadgets can be moved around, rearranged, deleted or recreated in the dashboard. More instances of the same gadget can be opened at the same time, possibly with different settings.

This portlet includes two parts:

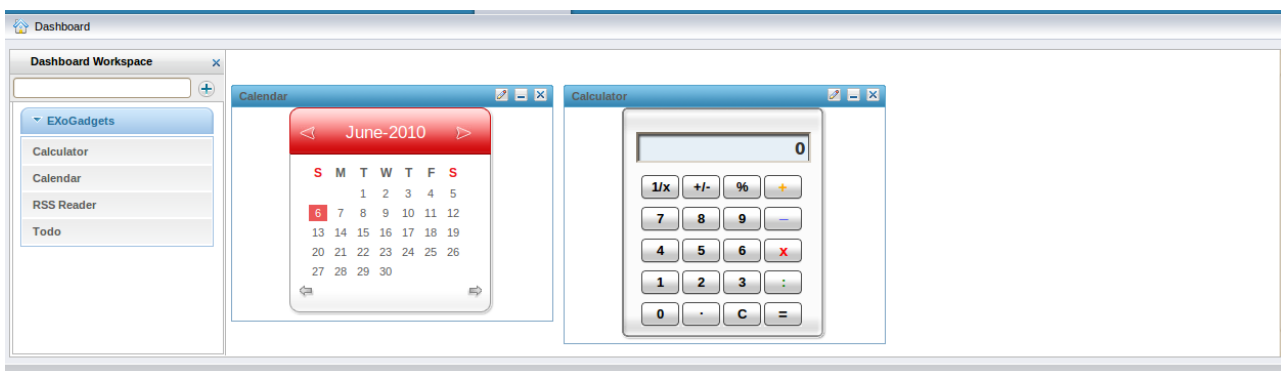


Illustration 17: Dashboard portlet



**Left pane:** This pane lists all gadgets. These gadgets provide you with some cool features. For example, you are free to choose your preferred skins. By default, there are five following gadgets but you also can add more gadgets.

- **Todo:** This mini-application helps you organize your day and work group easily and quickly. It is designed to keep track of your tasks in such a convenient manner. You can highlight tasks by coloring tasks with different colors.
- **Calendar:** A cool calendar keeps track of date in style. You also can switch easily between daily, monthly and yearly views and change the skin as you like.
- **RSS Reader:** This gadget lets you get a sneak preview of your favorite feeds around the web. You can have the latest news or the latest posts from your favorite blogs, the latest email, etc, all in one gadget. This gadget is a web-based gadget for receiving and viewing RSS feeds.
- **Calculator:** This is the coolest calculator for your page. This mini-application lets you perform most basic arithmetic operations. This gadget also offers cool skins to make your page more lively.

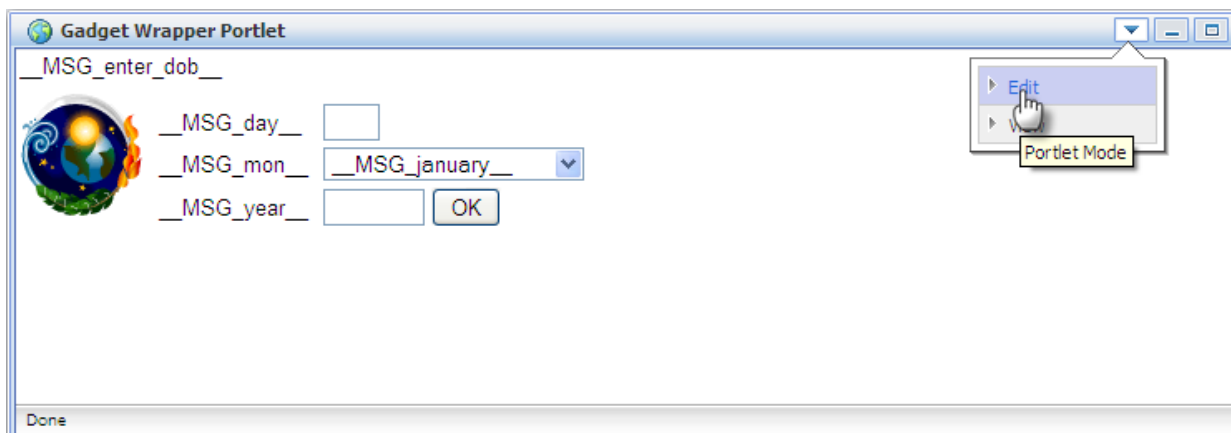
**Right pane:** This space is used for containing and rearranging gadgets by dragging them from the left pane and dropping them into and around this space.

### 3.2.11 Gadget Wrapper Portlet

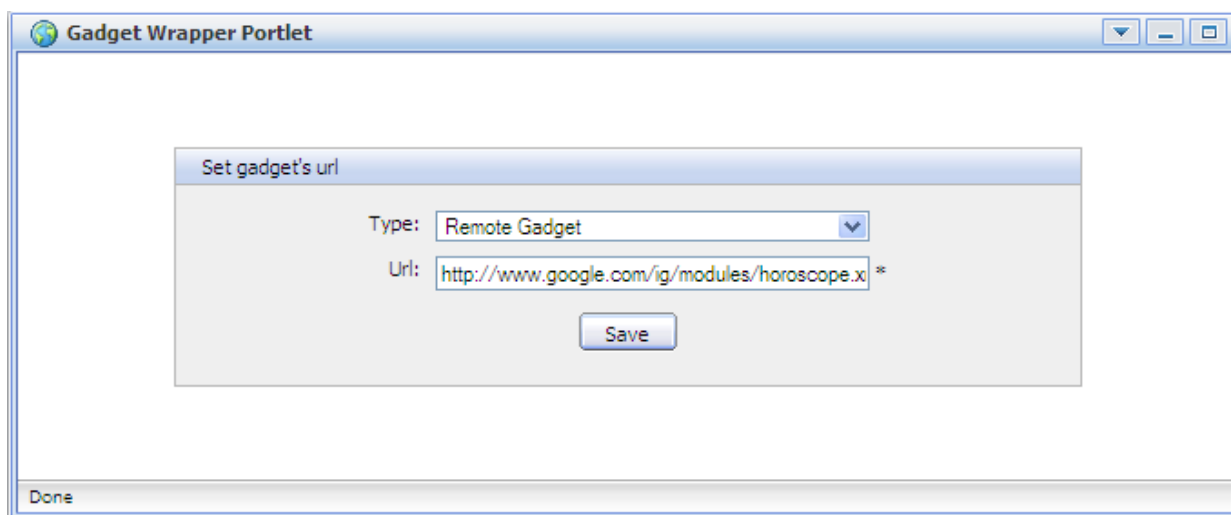
This portlet allows you to view a gadget in the canvas view mode.

To view a gadget in the canvas mode, do as follows:

**Step 1:** Select the **Edit** function in the menu:



The form to set gadget's url will appear:



**Step 2:** Select a gadget type in the **Type** field and enter a URL (a link refers to an expected gadget url) in the **Url** field.

**Step 3:** Click the **Save** button to accept the entered values. The expected gadget will be viewed in the canvas view mode.

## 4 INITIAL IMPLEMENTATION

---

### 4.1 *Requirements*

#### 4.1.1 Software

eXo Portal is a Java application. The portal trial version is a free download. However, new functions are usually updated without testing and guaranty in trial versions. In order to purchase a full version with guaranty and tested functions, please contact us at [sales@exoplatform.com](mailto:sales@exoplatform.com).

You can get the latest trial version package from this link:

<http://forge.objectweb.org/projects/exoplatform>. After downloading, you also need to download the following software which supports running eXo Portal:

- Download JDK (Java Development Kit) with version 1.5 or later.
- Application Server: Because the eXo portal is a web application using the client-server model, we need a server browser. You can use the Jboss Application Server, Jonas Application Server or Apache Tomcat.
  - ✓ Jboss Application Server version 4.2.0 : <http://labs.jboss.com/>
  - ✓ Jonas Application Server version 4.8.4: <http://wiki.jonas.objectweb.org/>
  - ✓ Apache Tomcat version 6.x <http://tomcat.apache.org>
- You need a database. By default, HSQL is delivered with eXo Portal so that you do not need to install a database. The eXo Portal can be used with the following databases:
  - HSQL (used by default)
  - My SQL
  - SQL Server
  - Oracle
  - PostGreSQL
  - DB2

## 4.1.2 Hardware

- Processor: 2.0 Ghz or higher
- RAM : at least 512MB

# 4.2 Setup

## 4.2.1 Establish A Base Structure

- Create a "java" directory which is called \$EXO\_BASE\_DIRECTORY. By default, the \$EXO\_BASE\_DIRECTORY directory will be in your \$HOME directory in Linux and in D: drive in Windows.
- Install JDK and maven2 in the java directory.
- Set the environment variable: JAVA\_HOME= EXO\_BASE\_DIRECTORY/JDK.
- Create an "exo-dependencies" and and "exo-working" directories in the "java" directory
- Copy a desired template application server directory to exo-dependencies. The directory name should have the form name of application server **-\${version}**. So the directory name may be **(tomcat-\$, jboss-\$, jonas-\$)**
- In the end, you need to have the following directory structure:

```

java/
    exo-dependencies/
        tomcat-${version}
        jboss-${version}
        jonas-${version}

    exo-working
    jdk1.5
    maven2

```

## 4.2.2 Configure environment

**Step 1:** Copy \$EXO\_BASE\_DIRECTORY/eXoProjects/tools/trunk/config/maven2/template-settings.xml to your \$HOME/.m2/settings.xml and adapt the configuration to your environment. If you do this, the maven2/conf/settings.xml will be ignored. This step is

mandatory for window environment.

**Step 2:** For Linux or Cygwin environment, you can bypass this step as the `exoenv.sh` script can copy and configure the `settings.xml` file automatically for you.

**Step 3:** In Linux or Cygwin environment: Copy `$EXO_BASE_DIRECTORY/eXoProjects/tools/trunk/build/src/main/resources/linux/exoenv.sh` to your `$HOME` or `$EXO_BASE_DIRECTORY` directory. Backup the old one if you have one.

In Window and DOS Environment: Copy `$EXO_BASE_DIRECTORY/eXoProjects/tools/trunk/build/src/main/resources/window/exoenv.bat` to your `$HOME` or `EXO_BASE_DIRECTORY` directory. Backup the old one if you have one.

**Step 4:** Update the Configuration: Edit the `exoenv.sh` or `exoenv.bat` file to adapt it to your environment. You should only have to change the `PORTABLE_DIR` variable at the beginning.

**Step 5:** Run the command to setup the environment: In linux or cygwin: `source exoenv.sh`  
To check if it has worked well, open `$EXO_BASE_DIRECTORY/maven2/conf/settings.xml` and check that the file corresponds to your environment, especially the definition of the repositories.

On window and dos prompt: `exoenv.bat`

### 4.2.3 Run Commands

- Launch Tomcat

In Linux or Cygwin Environment

- Go to `$EXO_BASE_DIRECTORY/exo-working/exo-tomcat/bin` directory
- Change the rights on `.sh` files to make them executable: `chmod +x *.sh`
- Run the command : `eXo.sh run`

- Launch Jonas

On Command line (Windows)

- Run `exoenv.bat` in `java` directory
- Go to `$EXO_BASE_DIRECTORY/exo-working/exo-jonas/bin/nt` directory
- Run the command `exo.bat start -fg`

- Launch Jboss

On Cygwin

- Go to \$EXO\_BASE\_DIRECTORY/exo-working/exo-jboss/bin directory
- Run the command: run.sh

## 5 PORTAL ADMINISTRATION

### 5.1 Register A New Account

Unregistered users visiting the portal will be limited in the contents and several applications which are not set as public. Meanwhile, users who want to access in-depth contents or perform some actions in various applications should register by themselves and then contact the portal administrators to gain certain rights or permissions.

The users can register an account quickly as follows:

**Step 1:** Click **Register** on the navigation bar.



The **Register Page** appears:

Information in the **Account Setting** is required, so the user has to input all fields, including:

- **User Name:** The name used to log in.
- **Password:** The password used to log in that must be between 6 and 30 characters, including spaces.

- **Confirm Password:** The retyped password above. Both fields, including **Password** and **Confirm Password** must be the same.
- **First Name:** The user's first name.
- **Last Name:** The user's last name.
- **Email Address:** The user's email address which must be in the right format, such as abc@yahoo.com.

**Step 2:** Fill in the form.

**Step 3:** Click the **Search** icon next to the User Name field to see whether the selected user name has been existing or not.

**Step 4:** Click the **Save** button to accept or **Reset** button to refresh all inputted information.

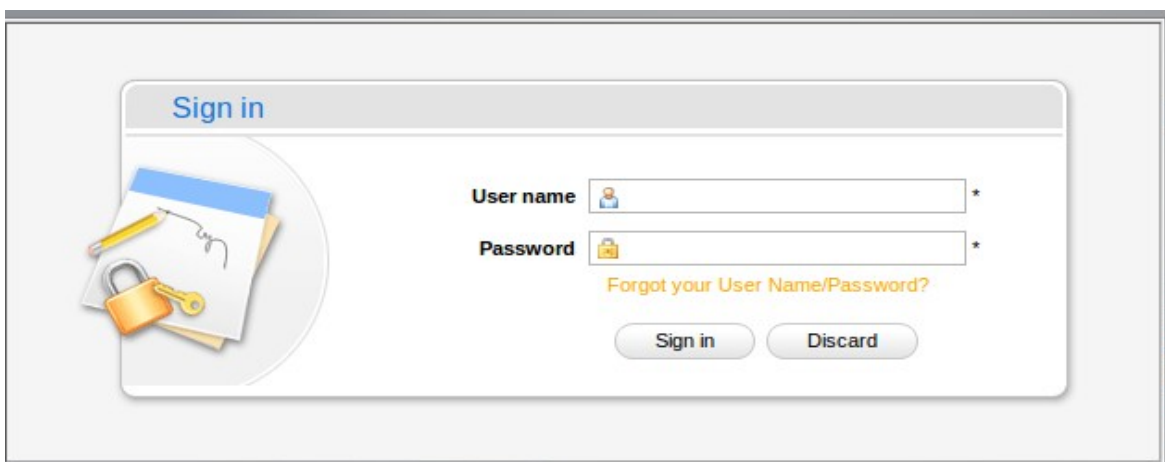
## 5.2 Sign In and Sign out

### 5.2.1 Sign In

To sign in the Portal, do as follows:

**Step 1:** Go to your portal by entering the URL into the address bar of your browser. (For example, http://localhost:8080/portal).

**Step 2:** Click the **Sign In** link at the top right of the page if you are currently in the Classic portal. The **Sign In** form appears:





**Step 3:** Input your registered **User name** and **Password**.

**Step 4:** Click the **Sign In** button to submit the form or **Discard** to exist.

If the **User name** does not exist or **User name** and/or **Password** is invalid, an alert message will appear. To attempt to log in again, click the **OK** button on the alert message to return to the **Sign In** form. Enter the **User name** and Password again.

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

## 5.2.2 Sign out

This feature ends the authenticated session and returns the user to the anonymous portal. To sign out, just hover your mouse over the **Sign Out** icon on the top right corner and click that icon.

## 5.3 Change Account Settings

This function allows changing your account information.

Do as follows:

Just click your account name after logging in to open the **Account Profiles** form:



The **Account Profiles** form will appear:

The screenshot shows a web interface for managing account profiles. At the top, there are two tabs: 'Account Profiles' and 'Change Password'. The 'Account Profiles' tab is active. Below the tabs, there are four input fields with labels and asterisks indicating required fields:

- User Name : demo \*
- First Name : Demo \*
- Last Name : exo \*
- Email : demo@localhost \*

Below the input fields are two buttons: 'Save' and 'Reset'. At the bottom center of the form is a 'Close' button.

Illustration 18: The Account Profiles form

***To change values in the account-related information, do as follows:***

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

**Step 2:** Change your **First Name**, **Last Name**, **Email**, except your **User Name**.

**Step 3:** Click the **Save** button to accept any change or the **Reset** button to refresh values.

***To change your password, do as follows:***

**Step 1:** Select the **Change Password** tab, the following form will be displayed:

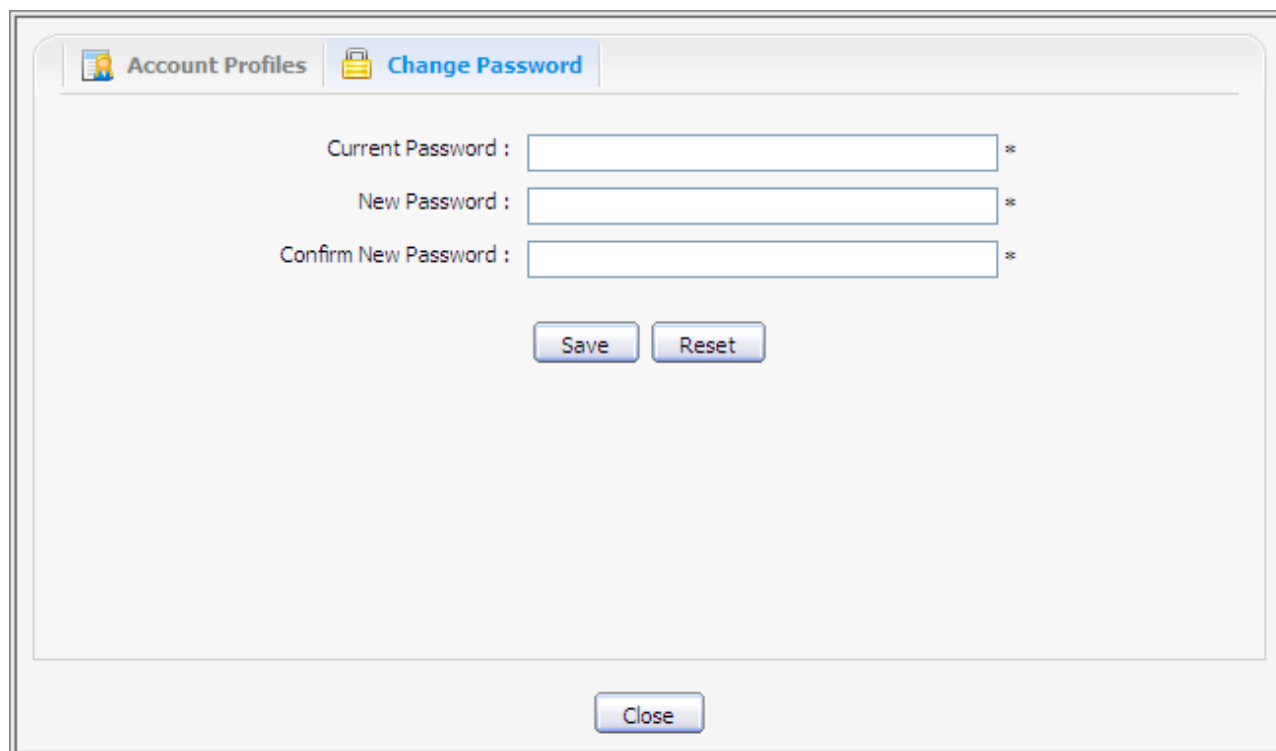


Illustration 19: The Change Password tab

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

**Step 3:** Enter your new password which must have at least 6 characters.

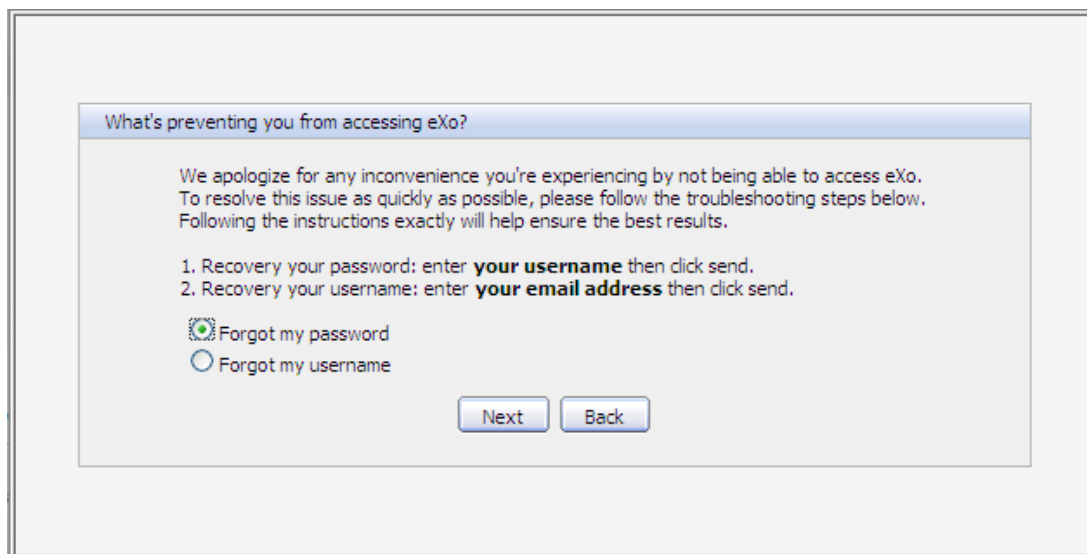
**Step 4:** Re-enter your password in the **Confirm New Password** field.

**Step 5:** Click the **Save** button to accept any change or **Reset** button to refresh all inputted values.

## 5.4 Retrieve User name/Password

In case you forget your account or password, you can recover by following these steps:

**Step 1:** Click the link "**Forget your User Name/Password?**" beneath the **Password** field in the **Sign in** form.



What's preventing you from accessing eXo?

We apologize for any inconvenience you're experiencing by not being able to access eXo. To resolve this issue as quickly as possible, please follow the troubleshooting steps below. Following the instructions exactly will help ensure the best results.

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

☒ Forgot my password  
☐ Forgot my username

Next Back

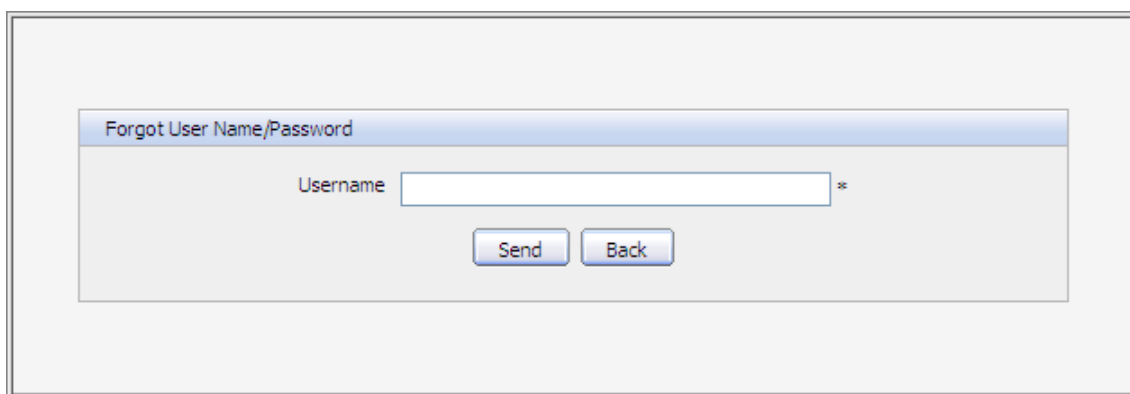
This form offers two options:

- **Forget my password**
- **Forget my username**

**Step 2:** Select the appropriate option.

**Step 3:** Click **Next** to go the next step. You will be prompted to provide information, depending on which option you have selected.

- *If you selected the '**Forgot my password**' option, you will be promoted for your user name:*

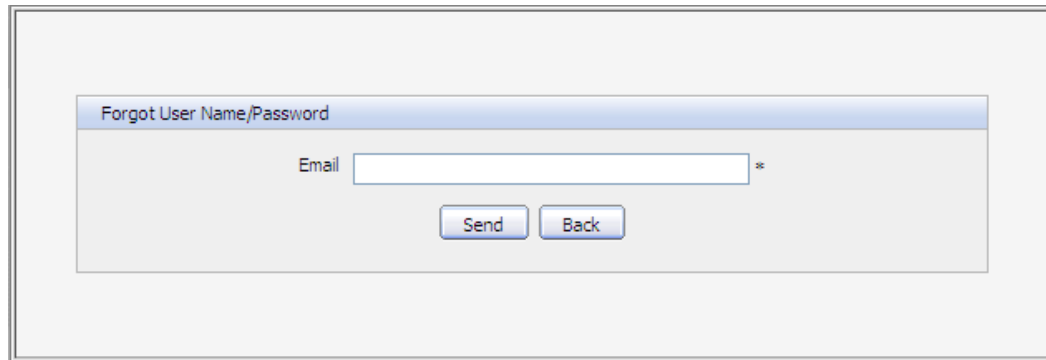


Forgot User Name/Password

Username  \*

Send Back

- *If you selected the '**Forgot my username**' option, you will be promoted for your email address:*



**Step 4:** Enter your **Username** or **Email** in the field of the above form.

**Step 5:** Click the **Send** button to submit the entered values.

After you submit the form, an email will be sent to your email address with the requested information.

- **If you forgot Username:** when retrieving Username, your old **Username** is still recovered and reused.
- **If you forgot Password:** a new password (as temporary) will be sent to you, then you will be redirected to change password when you sign in.

The **Username/ Password** that you received only takes effect for 1 day. It means that if the current date is over 1 day as from the receipt date, you can not use the received **Username/ Password**. Thus, you have to get another active email.

## 5.5 Set the display language

You can set language for yourself when you *register a new account*. To choose a preferred language for displaying Portal interface, do as follows:

There are two modes to set displaying language for a user.

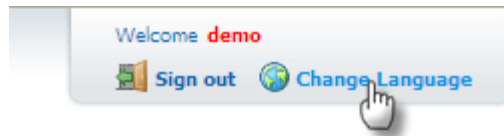
- **Public Mode:** The display language of this mode depends on the language of browser that you are using.
  - If you set the browser language not supported by Portal, the display language will be the Portal language.
  - If you set the browser language supported by Portal, the display language will be the browser language.
- **Private Mode:** The display language of this mode belongs to the language of each user

which is set when they register.

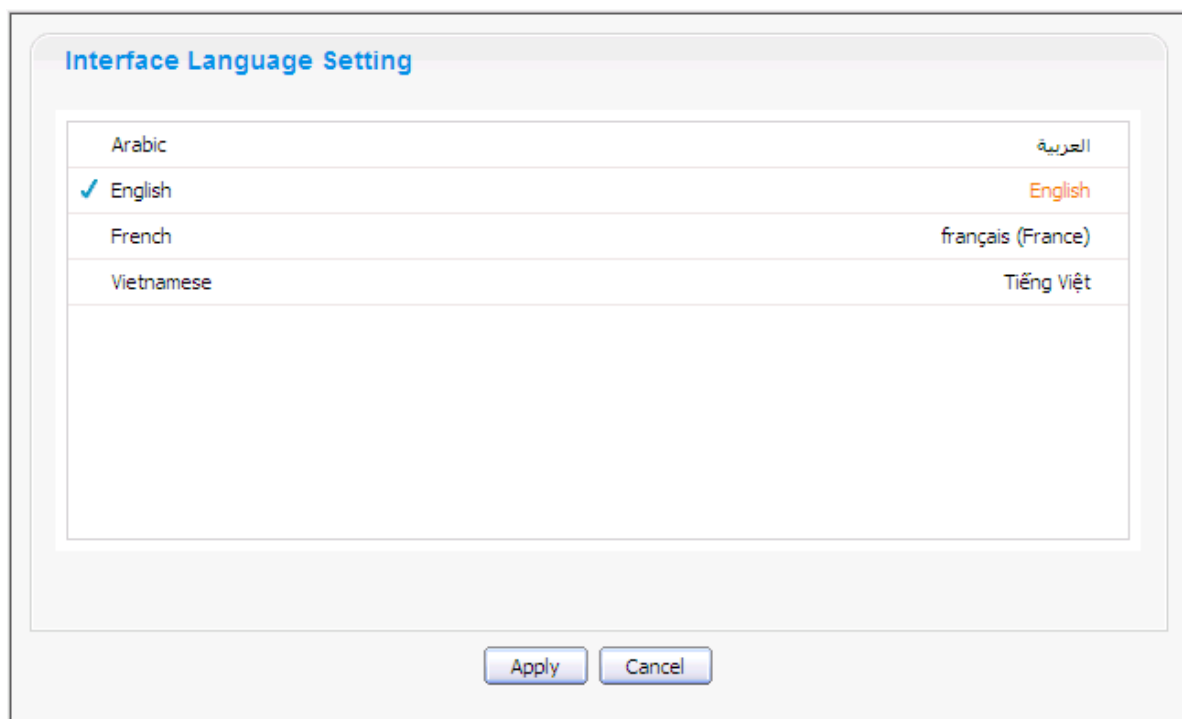
- When you sign in by a default account (root, john, demo, marry): the display language of these users are none, so it will belong to browser's language. If you change value of the **Language** field in the User Profile tab (only default user: root and john can change this value by accessing the **Management** page: Go to **Organization-->Management** page), your displaying language will be the set value.
- When you sign in by a new registered user: by default, your display language is English. However, if you set by another language in the **Language** field in the *User Profile* tab, your display language is the set language.

## 5.6 Change the display language

The priority order of display language is 1. User language 2. Browser language 3. Portal language. Thus, to display your preferred language, you should pay attention to this order to change language type appropriately.



**Step 1:** Click **Change Language** on the right corner to open the **Interface Language Setting** form: The **Interface Language Setting** form will appear:



**Step 2:** Select another language in the list. The selected language will be marked by the icon ✓.

**Step 3:** Click the **Apply** button to change the displaying language temporary and wait for few seconds to take affect or click **Cancel** button to quit without any change.

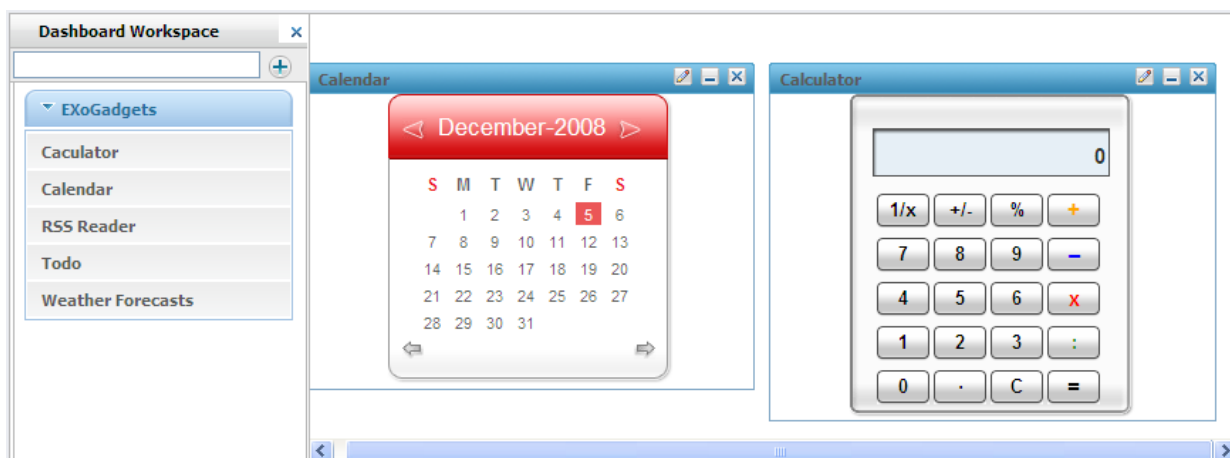
## 5.7 Add a gadget in Dashboard

Access the Dashboard page by clicking the **Dashboard** page on the Navigation bar:




**Illustration 20: The Dashboard page**

**Step 1:** Click the **Add Gadgets** link in this page to open the Dashboard workspace at the left pane:



**Step 2:** Enter a link (remote or local) to a .xml file in this text box at the left pane.

**Step 3:** Click the icon  to add a new gadget into the gadget list under.

**Note:**



*In the public mode, a normal user only may view gadgets without adding a new gadget or dragging and dropping them into the space at the right pane.*