CQ5 WCM User Guide

CQ5 WCM User Guide

CQ 5.1 WCM

Contents

1 Introduction

1.1 Introduction

CQ WCM has been designed for business users to easily create and publish content. Business users become empowered to share information quickly and efficiently and to provide high quality web content within an easy to use environment.

The product has been completely redesigned, and rewritten, which provides a new look-and-feel for the user.

1.2 Purpose of this Document

To explain how to use CQ WCM covering:

- normal usage with the GUI
- use Workflows
- perform CQ WCM administration

1.3 Target Audience

- Basic Users (particularly Overview of the GUI Console and Default Components)
- Power Users

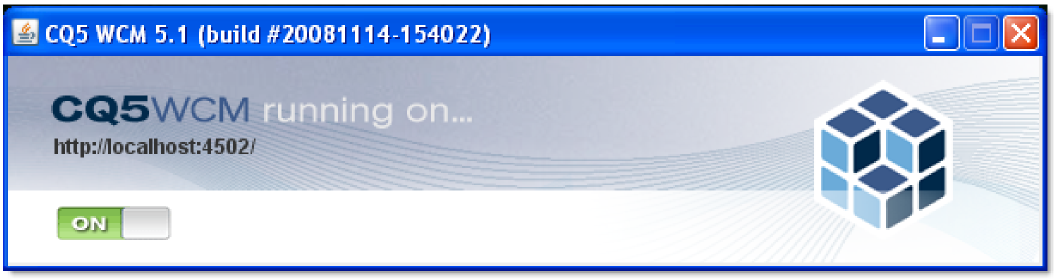
2 Connecting to CQ WCM

You connect to CQ WCM using your web browser.

1. To connect to CQ WCM you can either:

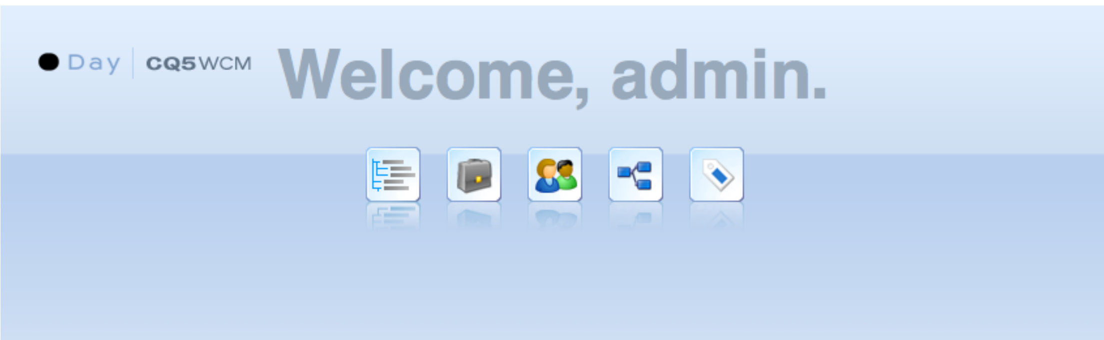
   a. Navigate to your CQ WCM instance using the URL supplied to you; for example `http://localhost:4502/`.

   b. If you have access to the CQ WCM Quickstart icon, click on the URL link to open CQ in your browser:

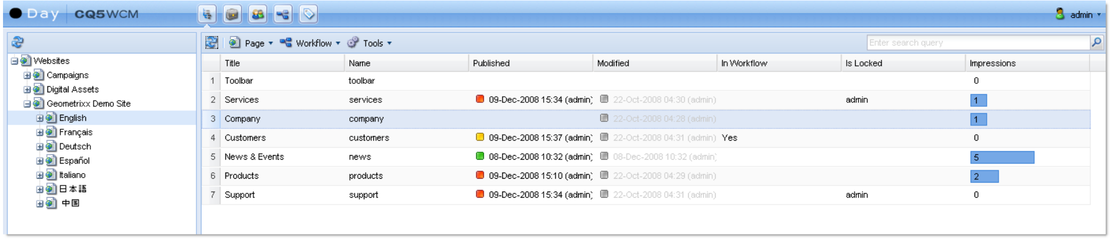


2. CQ WCM automatically opens the login page in your default web browser, for example, `http://localhost:4502/`. Enter your user name and password to log in and click **`OK`**.

3. By default, CQ WCM opens the welcome page:



4. Navigate to the appropriate window (see Chapter 3,) and start working in CQ WCM, for example wcm/siteadmin:



3 Overview of the GUI Console

CQ WCM uses a web-based graphical user interface. You need a web browser to access CQ WCM. The graphical user interface is divided into five windows where you can access all of CQ WCM functionality.

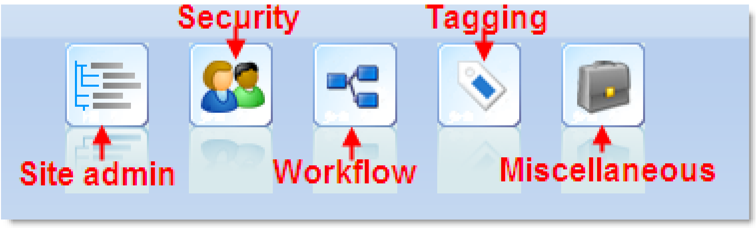


Table 3.1. CQ WCM windows

Window	Description
WCM/Site admin	Access all the pages in your web site; create, edit, and delete pages; start a workflow; activate and deactivate pages; restore pages; check external links; and access your user inbox.
Miscellaneous	Manage packages, workflow templates and scripts, designs, campaigns, and migration.
Security	Manage users and permissions.
Workflow	Manage pages that are in a workflow, create new workflow models using an easy to use graphical user interface.
Tagging	Manage your tags and taxonomies.

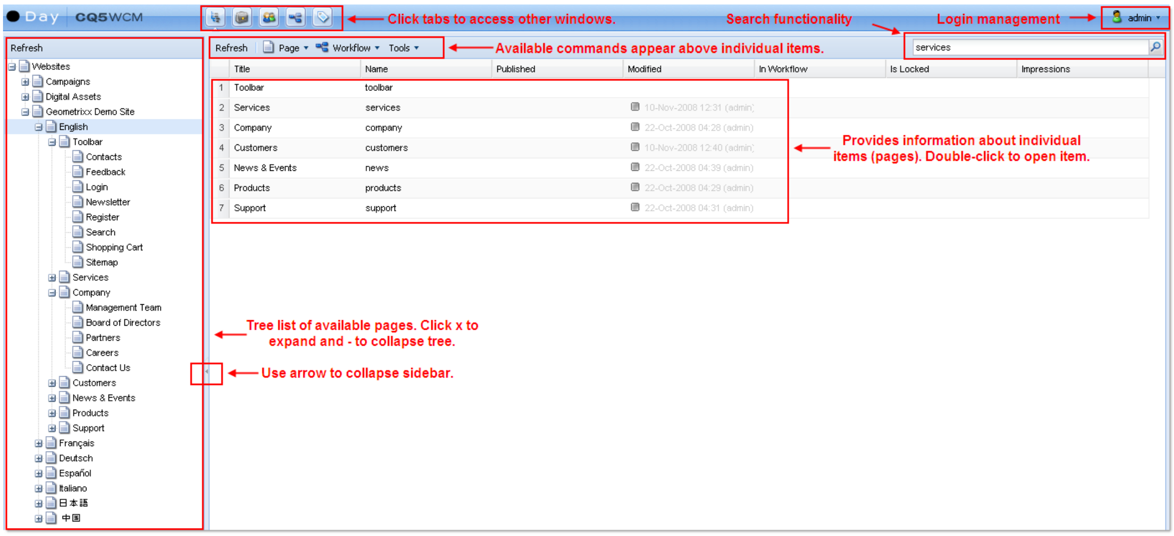
Throughout CQ WCM you can access the integrated version of this guide by using the

icon; as seen here in the Sidekick.

3.1 Navigating CQ WCM

Although each of the windows has different options, how you navigate CQ WCM is essentially the same:

- Double-click to open items.
- Access items from the tree list. Click x to expand and - to collapse those items.
- Click the tabs to access other windows.
- Available commands are above the items.
- Logging in and out is handled in the upper right corner.
- Collapse the sidebar by clicking the arrow.
- Search for pages using the search box.



3.1.1 Page Information

The site admin window provides important information about pages.

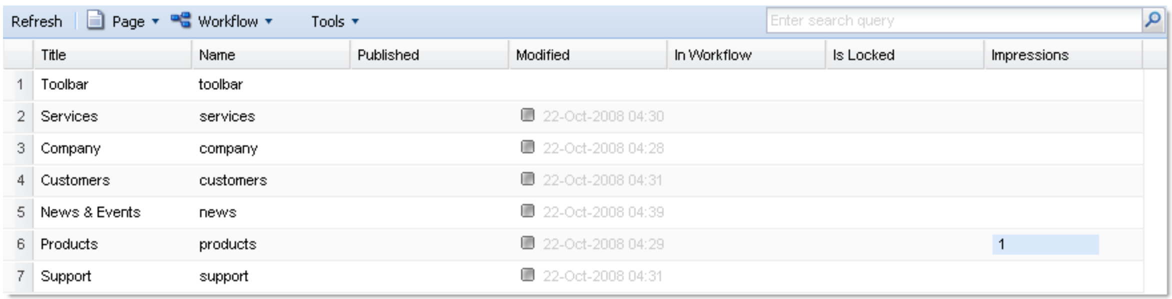


Table 3.2. Page Information

Column	Description
Title	The title that appears on the page
Name	The name CQ5 refers to the page
Published	Indicates whether the page has been published and provides the publication date and time.
Modified	Indicates whether the page has been modified and provides the modification date and time. In order to save any modifications, you must activate the page.
In Workflow	Indicates whether the page is part of a workflow.
Is Locked	Indicates whether a page is locked.
Impressions	Indicates the number of versions a page has.

3.2 Managing Pages within CQ WCM

This section describes how to create a page within CQ WCM and then create content on that page.

Important

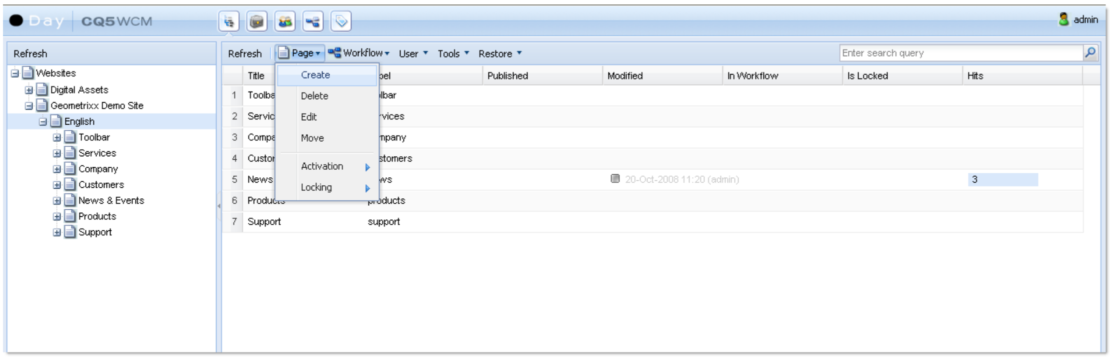
Your account needs the appropriate access rights to create or edit pages.

3.2.1 Creating a New Page

Unless all pages have been created for you in advance, before you can start creating content, you must create a page:

1. From the wcm/siteadmin window, select the level at which you want to create a new page.

   In the following example, you are creating a page under the level **`English`** - shown in the left pane; the right pane shows the existing pages at this level.

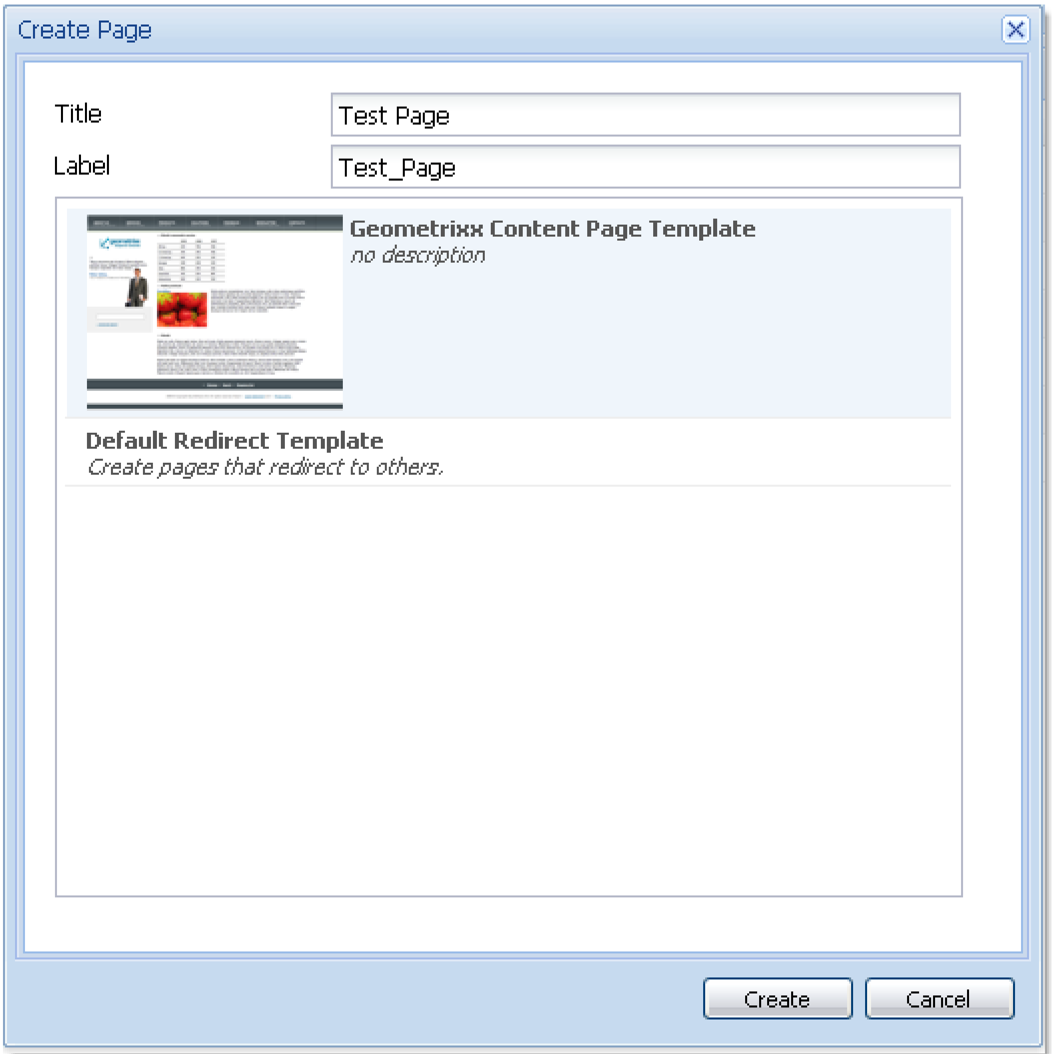


2. In the **Page** menu, select **`Create`**. The **`Create Page`** window opens.

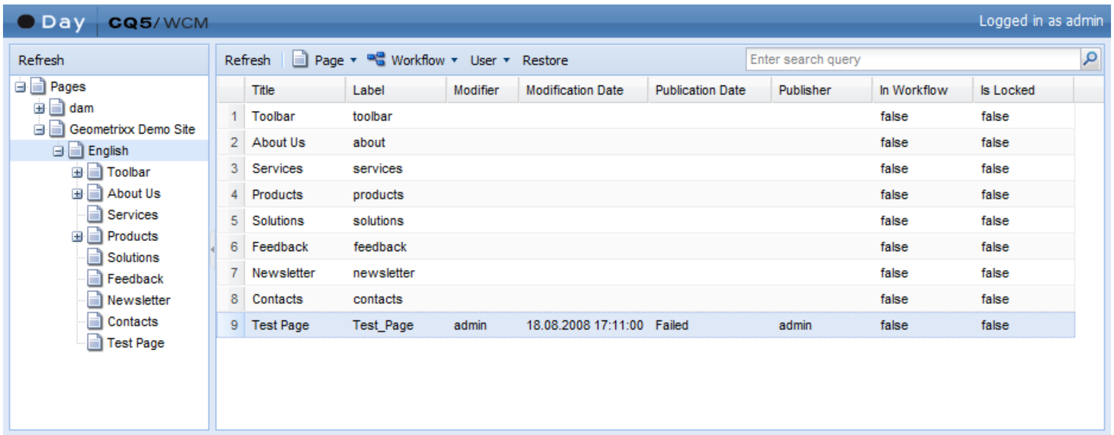
3. In the **`Title`** field, select a title that is displayed to the user.

4. In the **`Label`** field, select a label that is used to create the URI.

5. Click the template used to create the new page, which determines the basic layout of the page.



6. Click **`Create`** to create the page. You return to the wcm/siteadmin window where you can see an entry for the new page.



This provides information about the page (for example when it was lasted edited and by whom) which is updated as necessary.

3.2.2 Editing a Page

After the page has been created, you can edit its content. When you first create a page, the page includes only the text and elements from the template. You add content by double-clicking or dragging and dropping components onto the page.

3.2.2.1 Opening a page

You can open the page to be edited by one of several methods:

- From wcm/siteadmin, you can **`double-click`** on the page title to open it for editing. Your page opens in a new window.
- After you have opened a page, you can navigate to other pages within the site to edit them by clicking hyperlinks.

3.2.2.2 Inserting a new paragraph

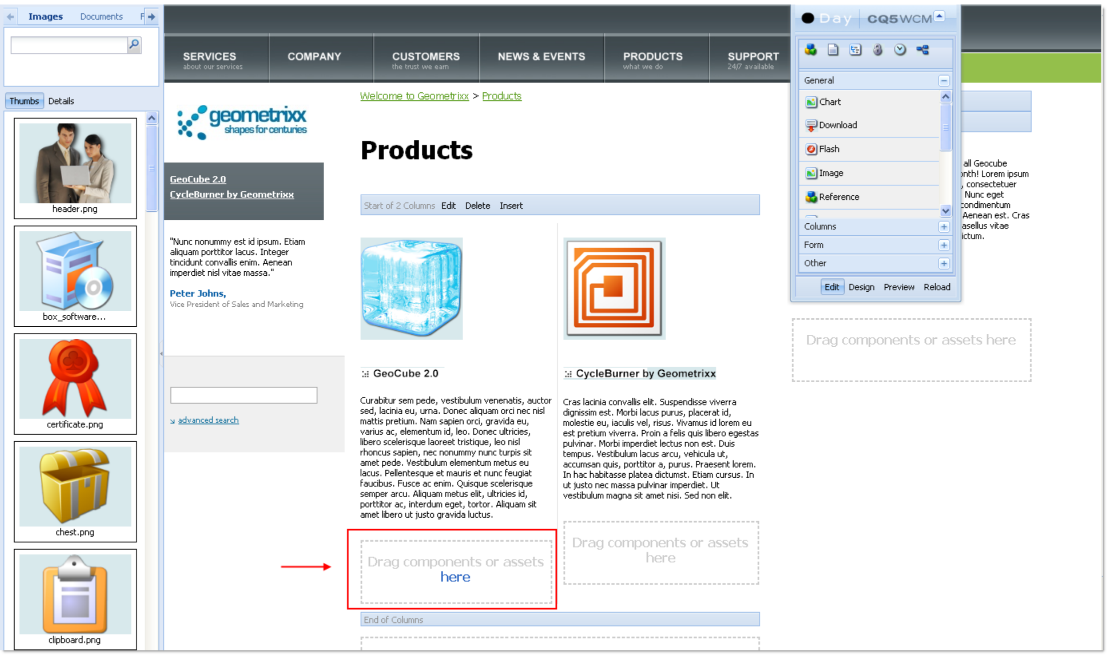
After you open the page, you can start to add content. You do this by adding *paragraphs* (also called *components*).

To insert a new paragraph:

1. Double-click the area labeled **`Drag components or assets here...`** or drag a component from the floating toolbar to insert a new paragraph. This area appears wherever new content can be added, such as at the end of the list if other paragraphs exist or at the end of a column.

   Note

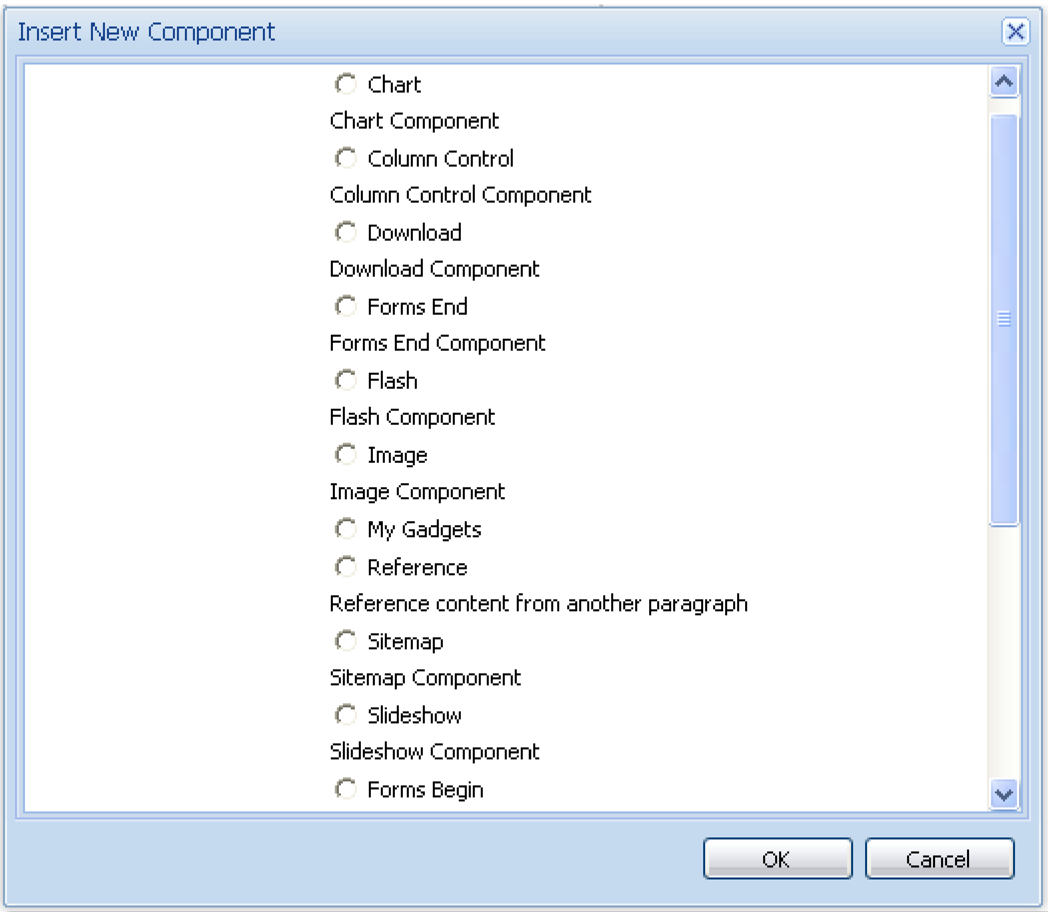
   If a paragraph already exists, you can **`right-click`** the paragraph and select **`Insert`**. This inserts the new paragraph before the existing one.



2. After you select to insert a paragraph, you see a list of the available paragraph types.

   Note

   Depending on your production environment, these choices may differ. For complete details on components, see Default Components.



3. Select the component that you want and click **OK**. A window opens that allows you to configure your paragraph and add content.

3.2.2.3 Editing a paragraph

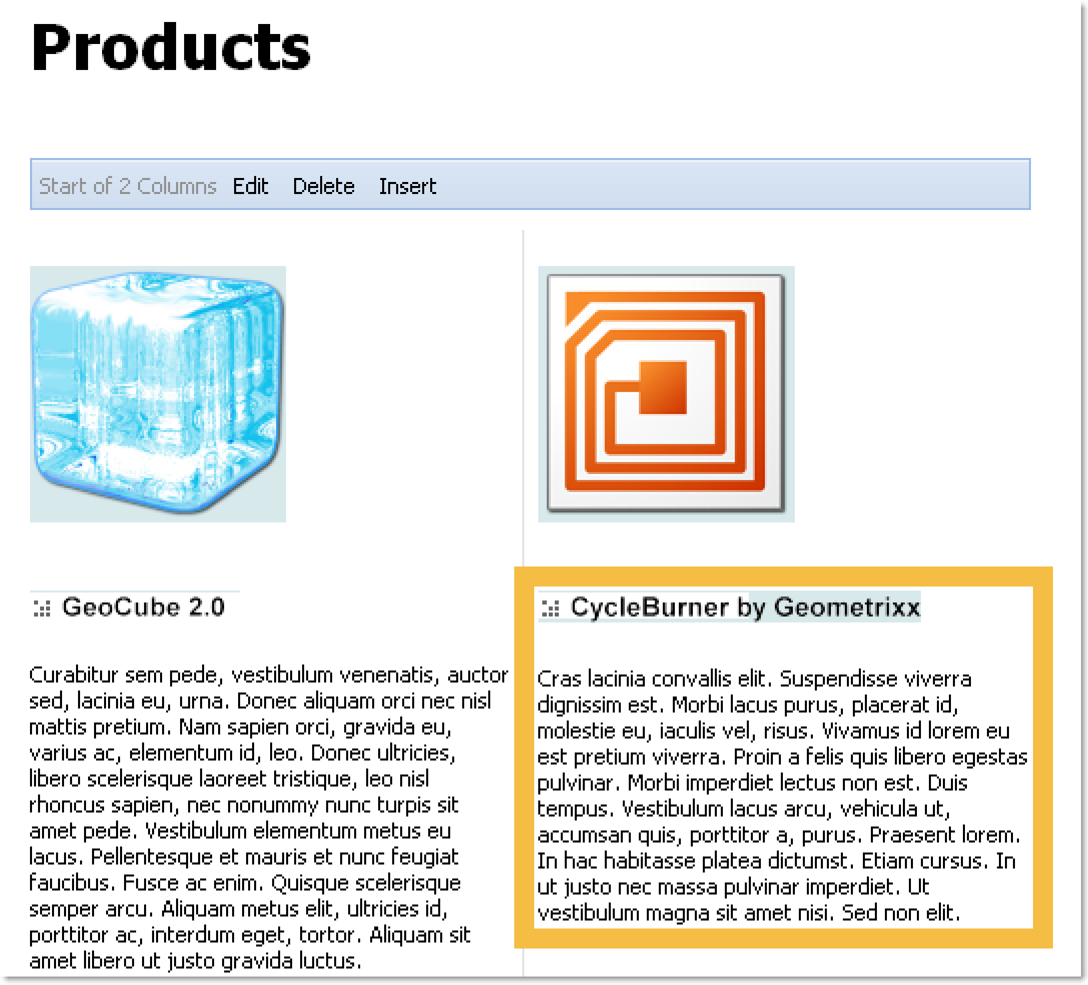
To edit an existing paragraph, do one of the following:

- Double-click the paragraph to open it. You see the same window as when you created the paragraph with the existing content. Make your changes and click **OK**.
- Right-click the paragraph and click **Edit**.

3.2.2.4 Moving a paragraph

To move a paragraph:

1. Click the paragraph you want to move. CQ WCM highlights the paragraph.

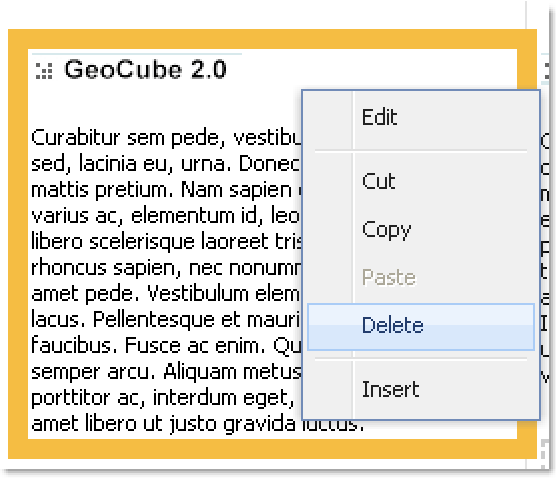


2. Drag the paragraph to the new location and drop it. Your paragraph is moved. CQ WCM indicates where paragraphs can be moved to with a green checkmark.

3.2.2.5 Deleting a paragraph

To delete a paragraph:

1. Select the paragraph and **`right-click`**.



2. Select **Delete** from the menu. CQ WCM confirms that you want to delete the paragraph as this action cannot be undone.

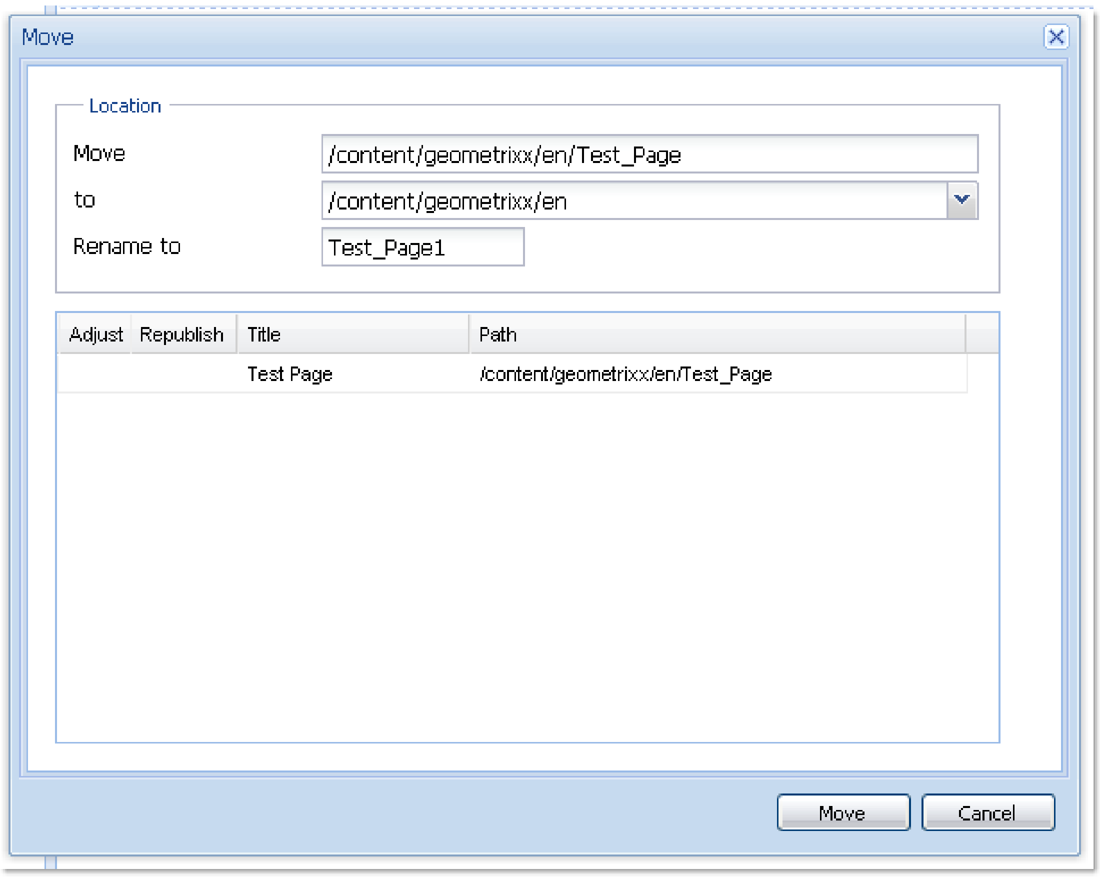
3. Click **OK**.

3.2.3 Moving or Renaming Page

The procedure to move or rename a page is the same. You do not need to do both: you can rename a page without moving it or vice versa.

To move or rename a page:

1. From the wcm/siteadmin window, click to select the page, then select the **Page** menu and select **Move**. (You can also right-click after you click the page and select **Move**.) The **Move** window opens where you can either specify a new location, a new name for the page, or both.



2. Fill in the following fields, as appropriate:

   Move
   : Specify the page to be moved - this is usually filled in by default, depending on how and where you started the move action.

   to
   : Use the sitemap (available via the drop-down menu
   
) to select the location where the page should be moved to. If you are only renaming the page, ignore this field.

   Rename to
   : The current page label displays by default. Specify the new page label, if required.

3. Click **Move**. CQ WCM confirms that you want to move or rename the current page. Click **OK** to confirm.

3.2.4 Deleting a Page

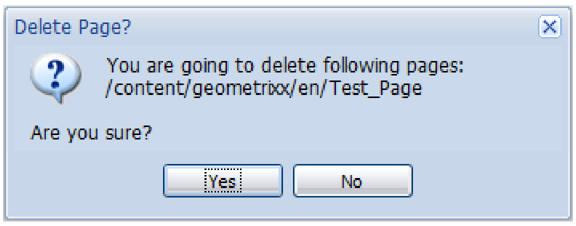
1. You can delete a page from various locations:

   - Within the wcm/siteadmin window, click to select the page, then open the **Page** menu and select **Delete**.
   - Within sidekick use the page actions tab to select **Delete** - this deletes the page currently open
   - Within sidekick use the site map tab - navigate to page to be deleted, then **right-click** and select **Delete**

2. After the page has been selected you must confirm the deletion of the page - as the action cannot be undone.

   Note

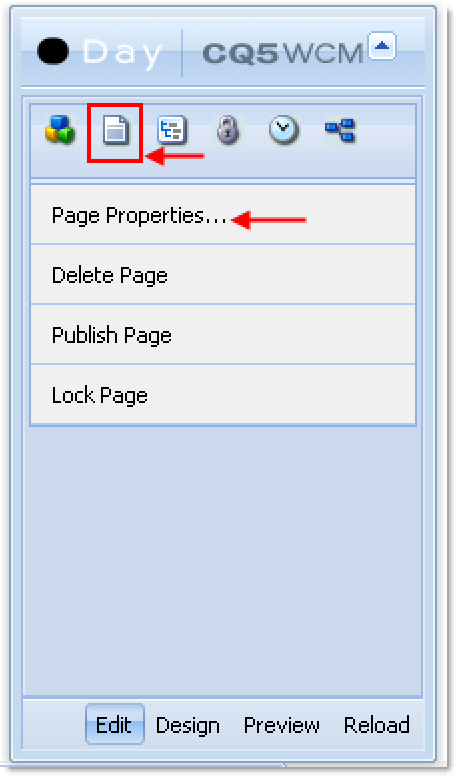
   If the page has been published you can restore the latest (or a specific) version, but this may not have exactly the same content. See the section called "How To Restore Pages" for further details.



3.2.5 Setting the Page Properties

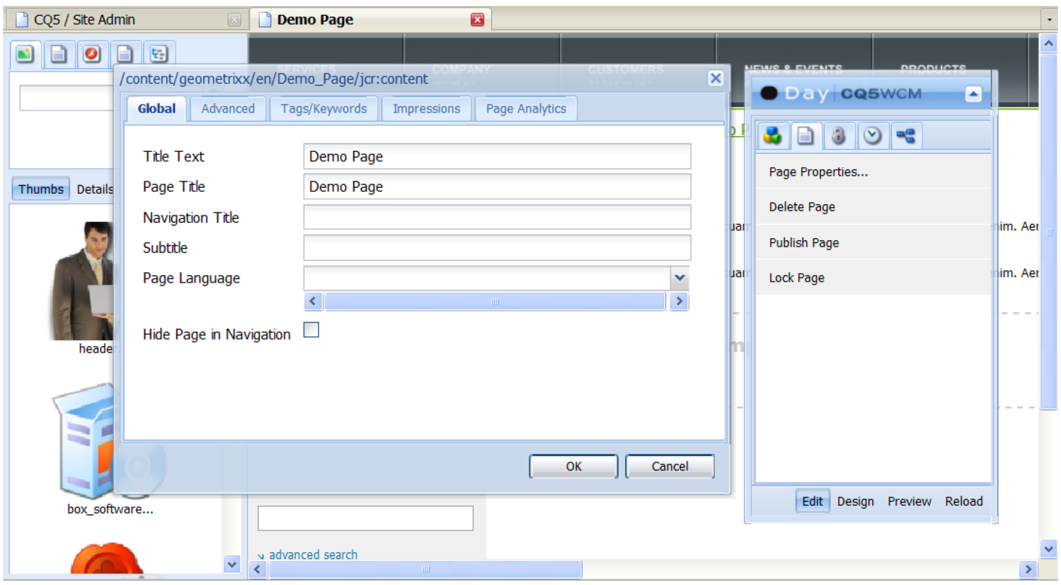
Page Properties define the various properties of the page, such as titles, when they appear on the website and others.

1. Open the page you want to edit.
2. In the sidekick, click the Page icon. Select **Page Properties...** from the list.



3. In the window that opens, you can modify the global, advanced, tags, impressions, and page analytics of a page:

a. Global



Title Text
The page title - as appears in the siteadmin list.

Page Title
A title to be used on the page.

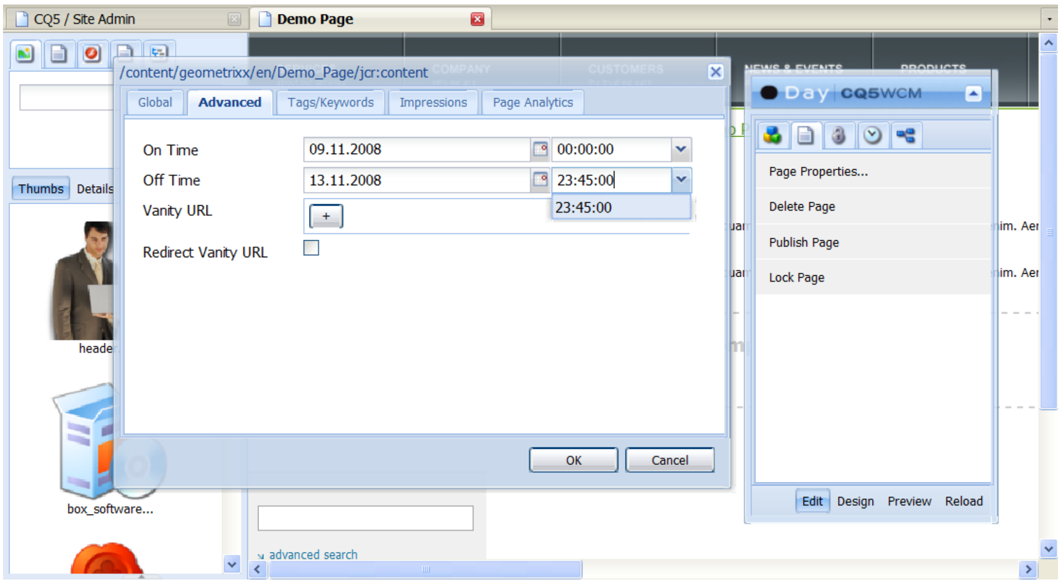
Navigation Title
A title for the page for use within the navigation map. Often shorter than the full title.

Subtitle
A subtitle for use on the page.

Page Language
The

Hide Page in Navigation
A toggle switch to indicate whether the page will be shown, or hidden in the page navigation.

b. Advanced



On Time
The date and time at which the published page will be activated. When published this page will be kept dormant until the specified time. Leave these fields empty for pages you want to publish immediately (the normal scenario).

Off Time
The time at which the published page will be deactivated. Again leave these fields empty for pages you want to publish immediately.

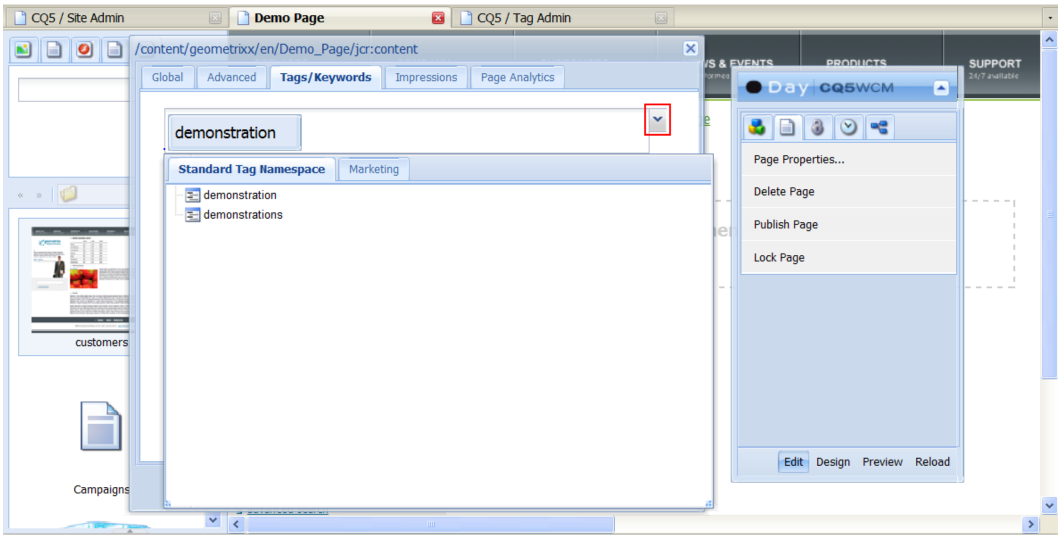
Vanity URL
Allows you to enter a vanity URL for this page.

Redirect Vanity URL
Indicates whether you want the page to use the vanity URL.

c. Tags/Keywords

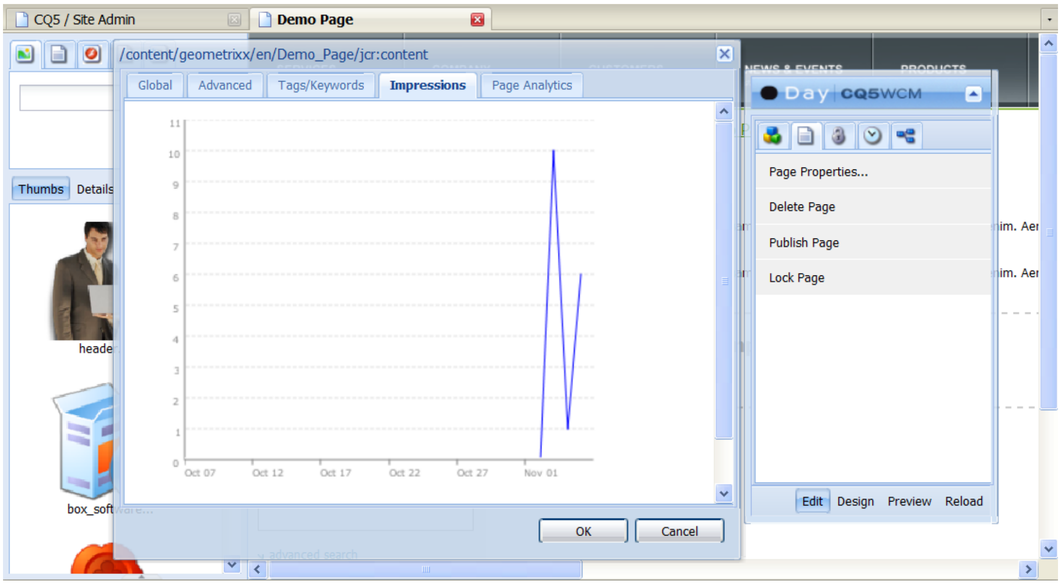
Here you can add, or remove tags from the page by updating the list in the selection box:

- A completely new tag can be entered by typing the name on an empty space in the selection box.
- With the drop-down functionality you can select from existing tags.
- An **x** will appear when you mouse-over a tag entry in the selection box; this can be used to remove that tag for this page.

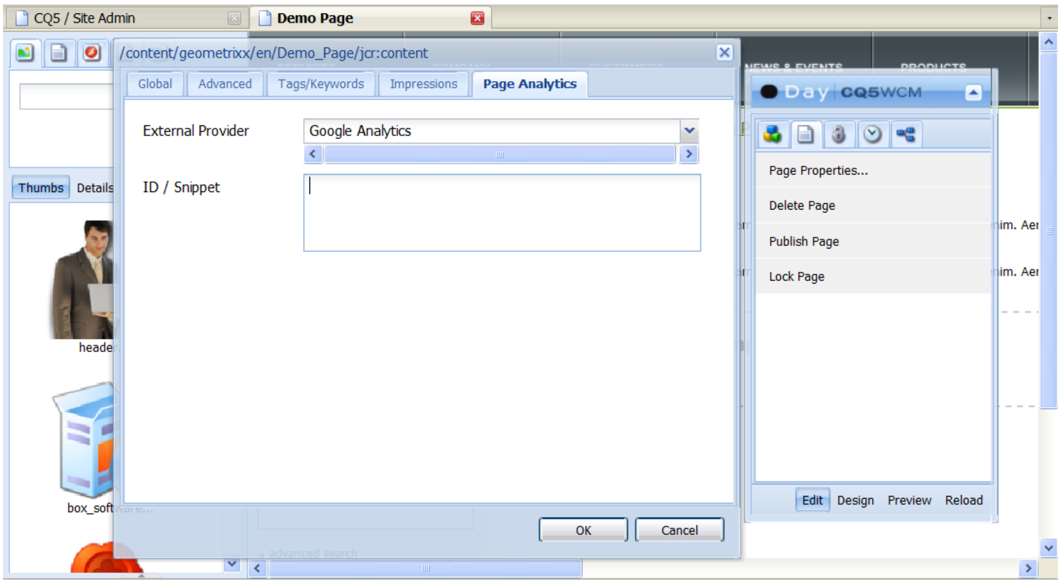


d. Impressions

This shows the activity on the page as in the impressions generated.



e. Page Analytics



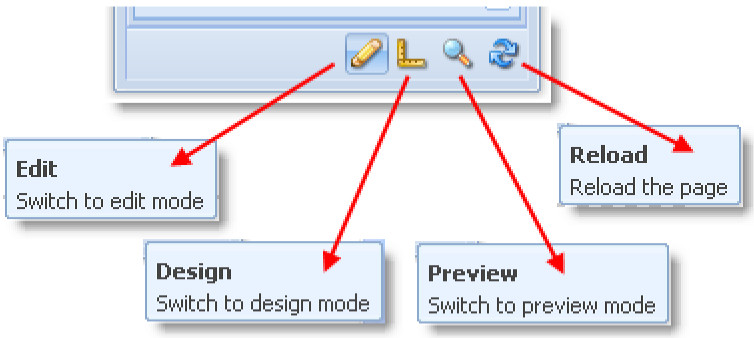
Provider
    The provider who will be generating the analytical statistics.

ID / Snippet
    The ID or code snippet to be included on the page.

4. Click **OK** to save the new properties.

3.3 Using Edit, Design, and Preview Modes

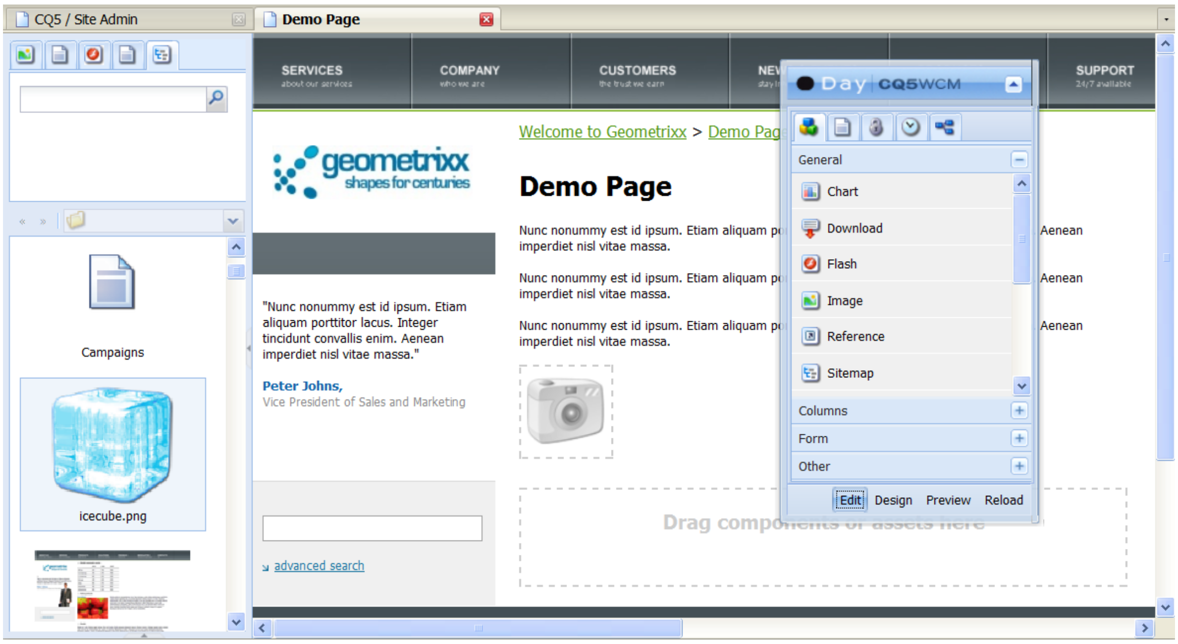
The row of icons at the bottom of the Sidekick are used to switch modes for working with the pages:



The Sidekick minimizes in certain modes - namely Design and Preview. By clicking on the arrow you can maximize the Sidekick and return to Edit Mode:

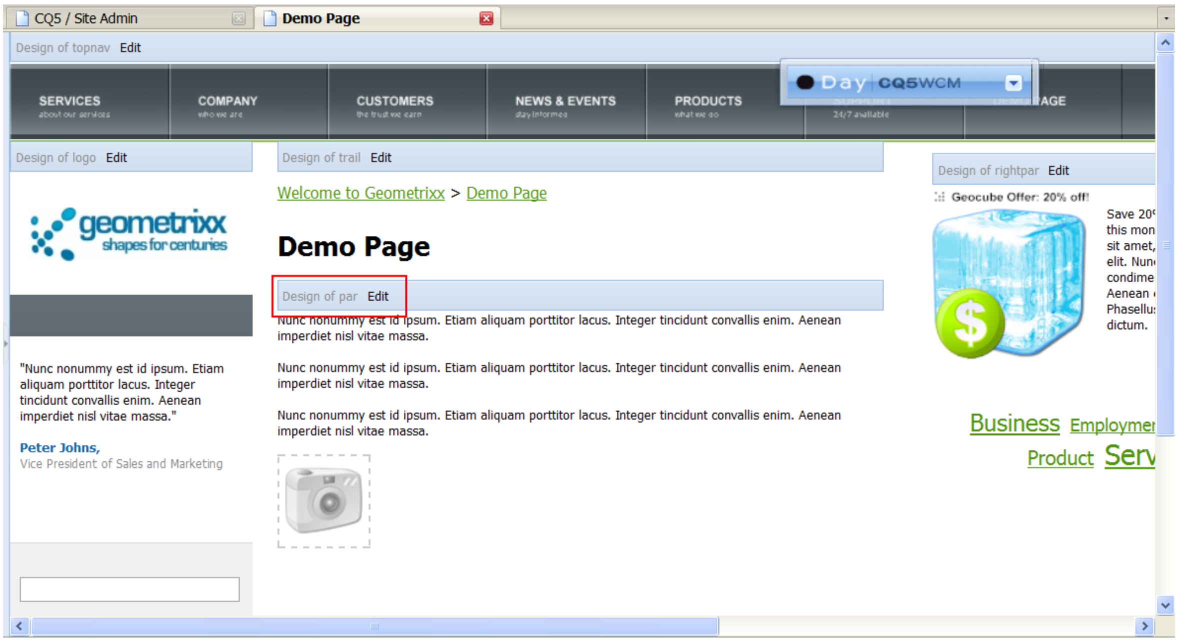
3.3.1 Edit Mode

This is the default mode and allows you to edit the page, adding or deleting components and making other changes.

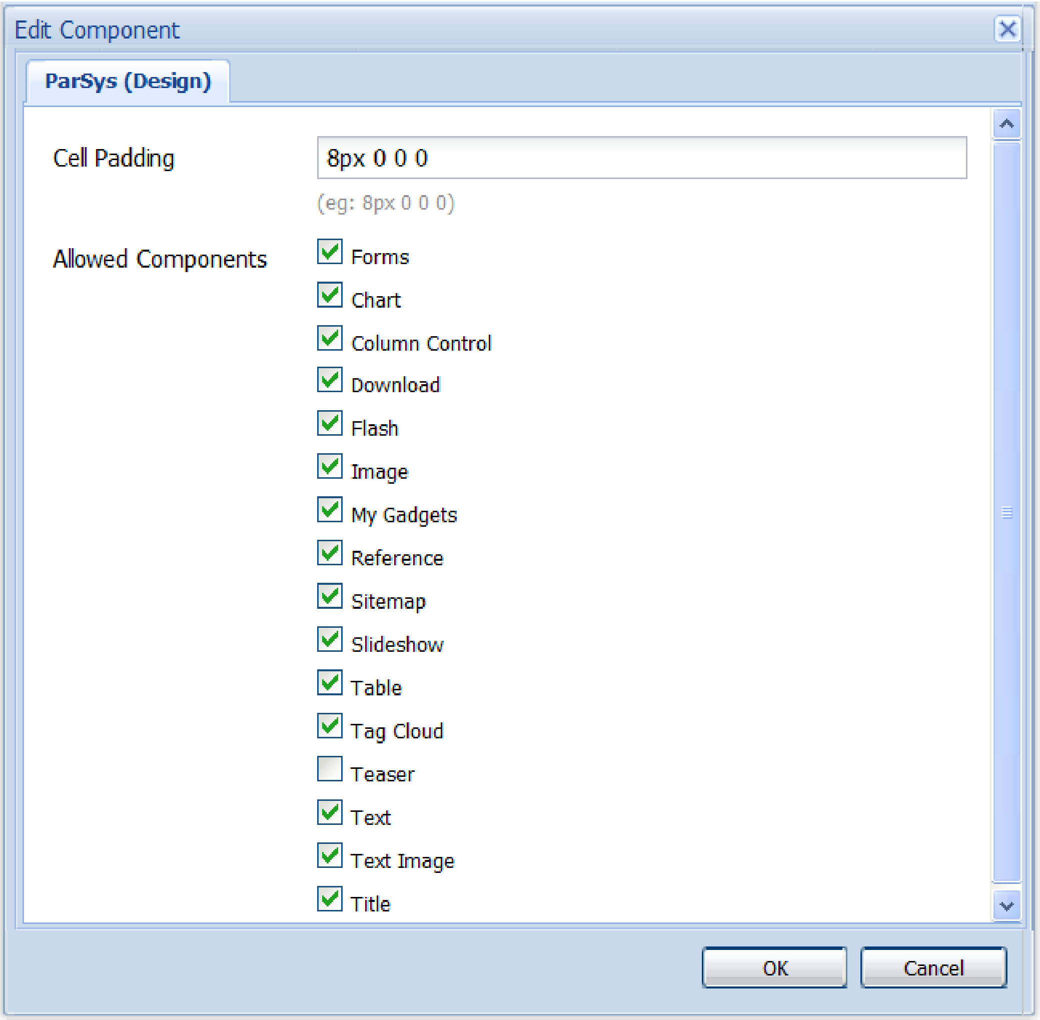


3.3.2 Design Mode

This mode gives you the possibility to edit the design of the page:



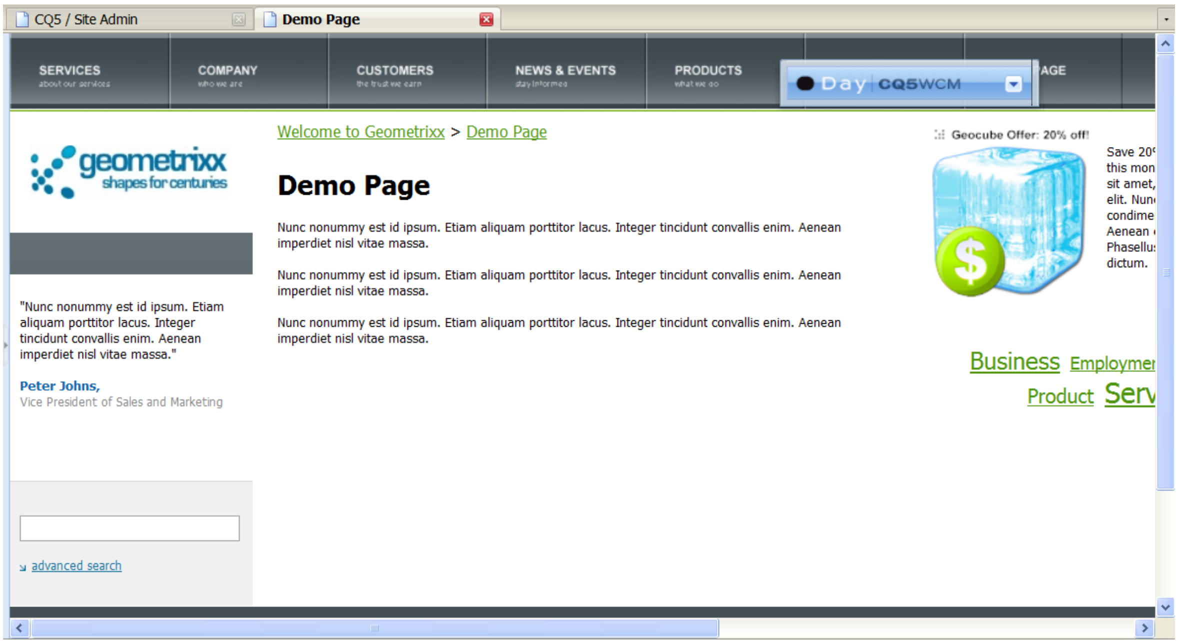
For example, if you click **`Edit`** on the Paragraph system you can add, or remove what components are available:



As in Design mode, the Sidekick minimizes in Preview mode. Click the arrow to return to Edit mode.

3.3.3 Preview Mode

This mode allows you to preview the page as if it were appearing on your website in its final form.



As in Design mode, the Sidekick minimizes in Preview mode. Click the arrow to return to Edit Mode.

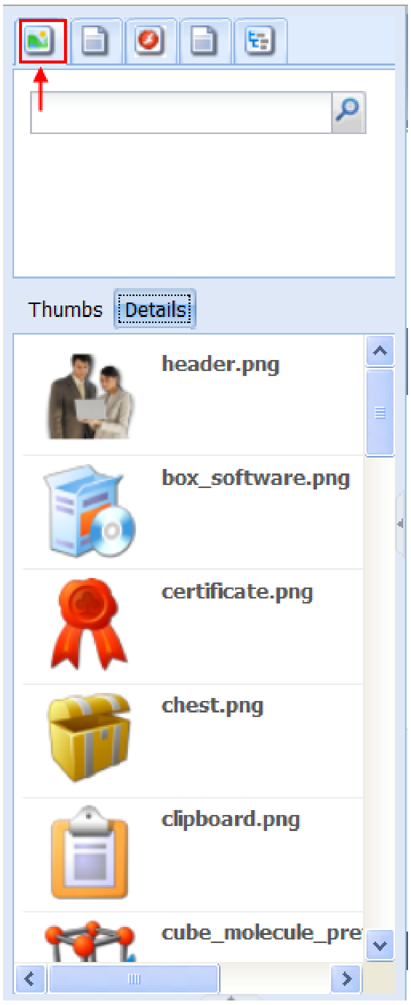
3.4 Using the Content Finder

The Content Finder is a quick and easy way to find content within the repository when editing a page.

3.4.1 Finding Images

This tab lists any images in the repository.

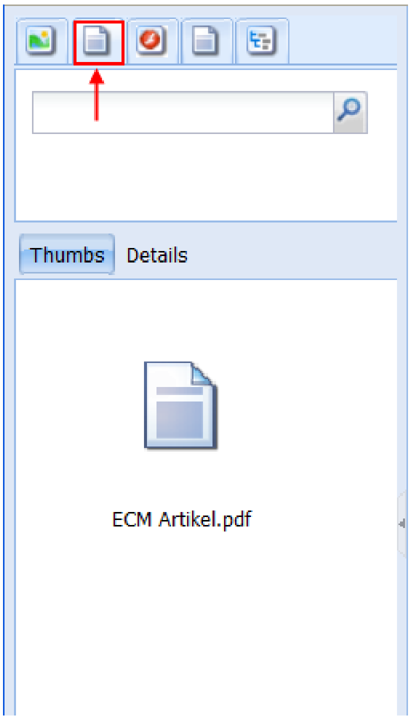
After you have created an Image paragraph on your page, you can drag an item and drop it into the paragraph.



3.4.2 Finding Documents

This tab lists any documents in the repository.

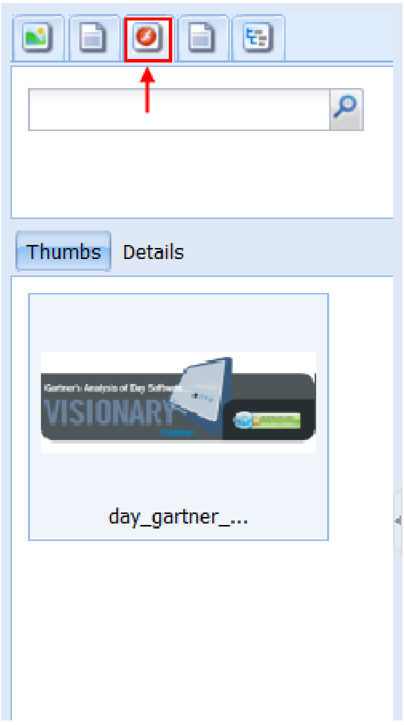
After you have created a Download paragraph on your page, you can drag an item and drop it into the paragraph.



3.4.3 Finding your Flash resources

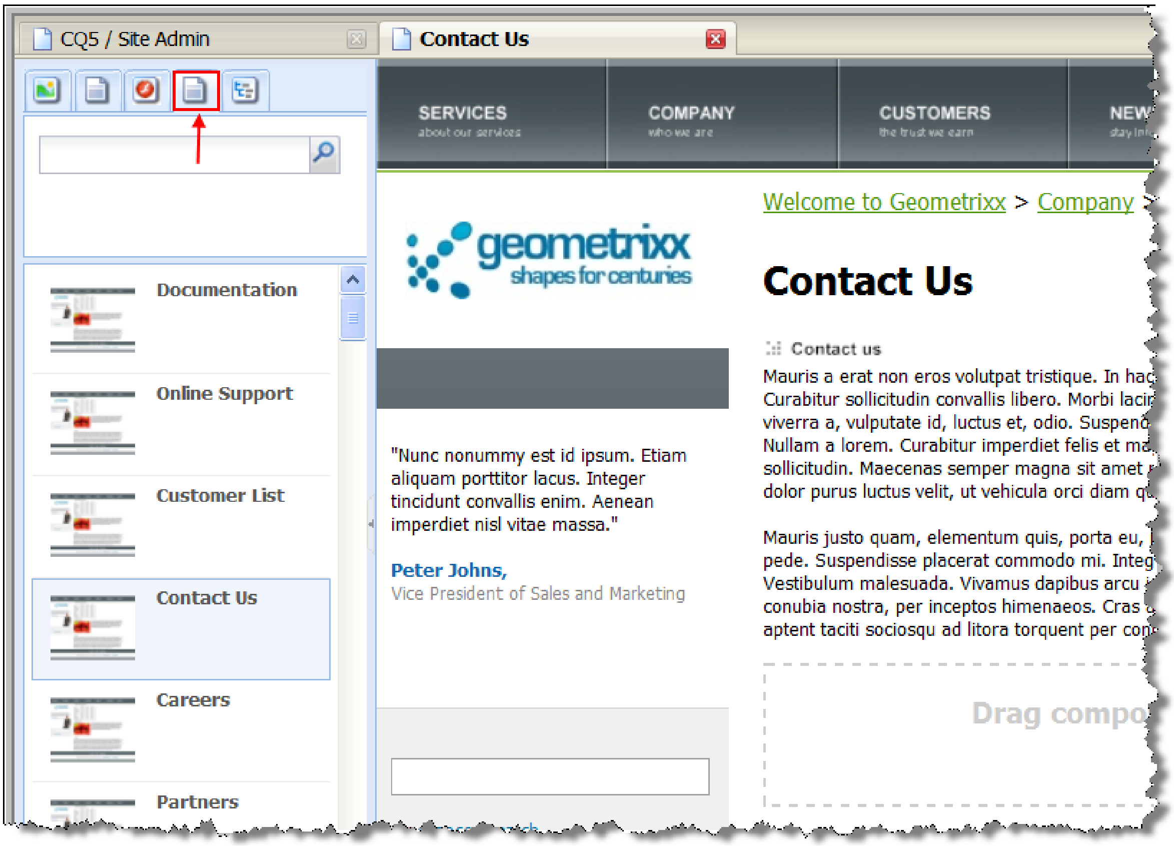
This tab lists any Flash items in the repository.

After you have created a Flash paragraph on your page, you can drag an item and drop it into the paragraph.



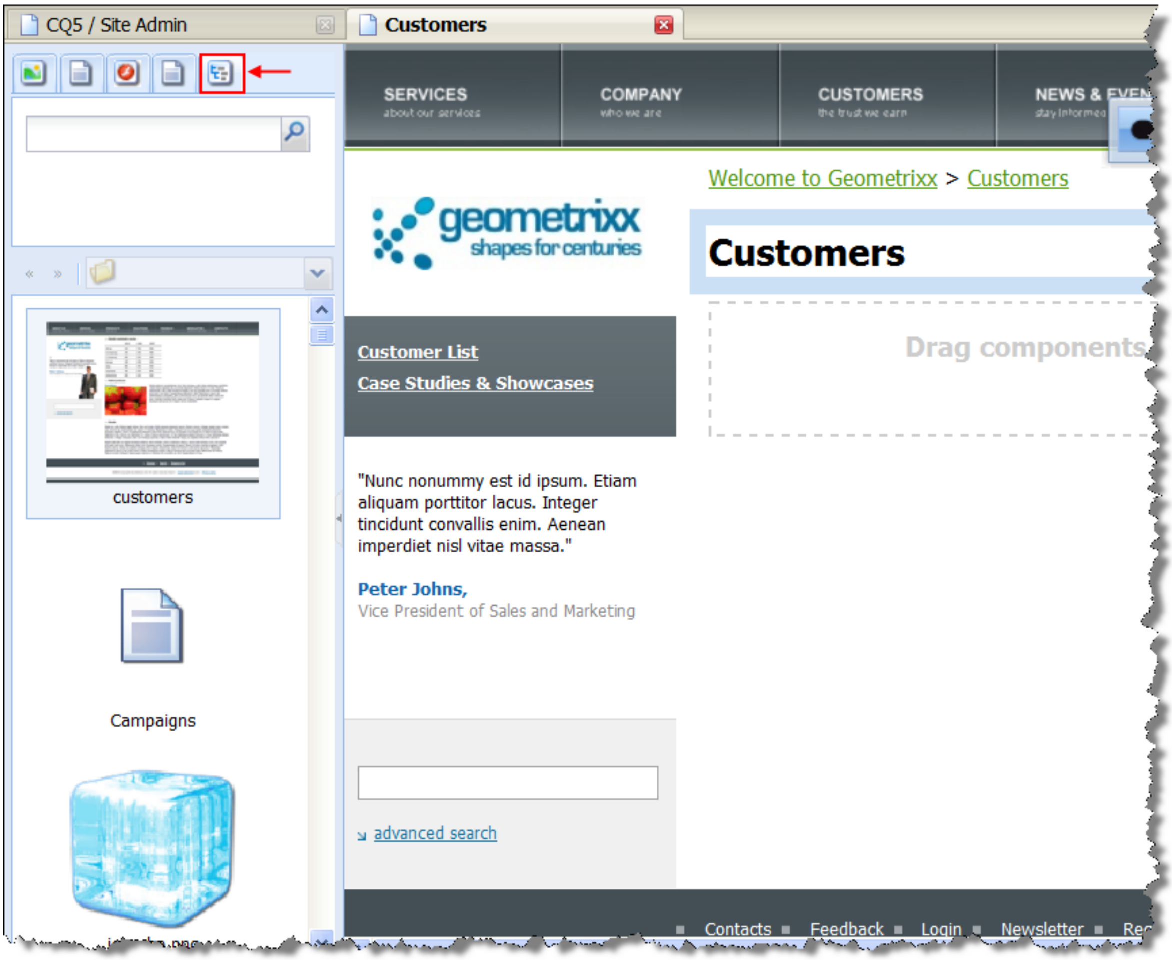
3.4.4 Finding Pages

This tab shows all pages. **`Double-click`** any page to open it for editing.



3.4.5 Using the Full Repository View

This tab shows all the resources in the repository.

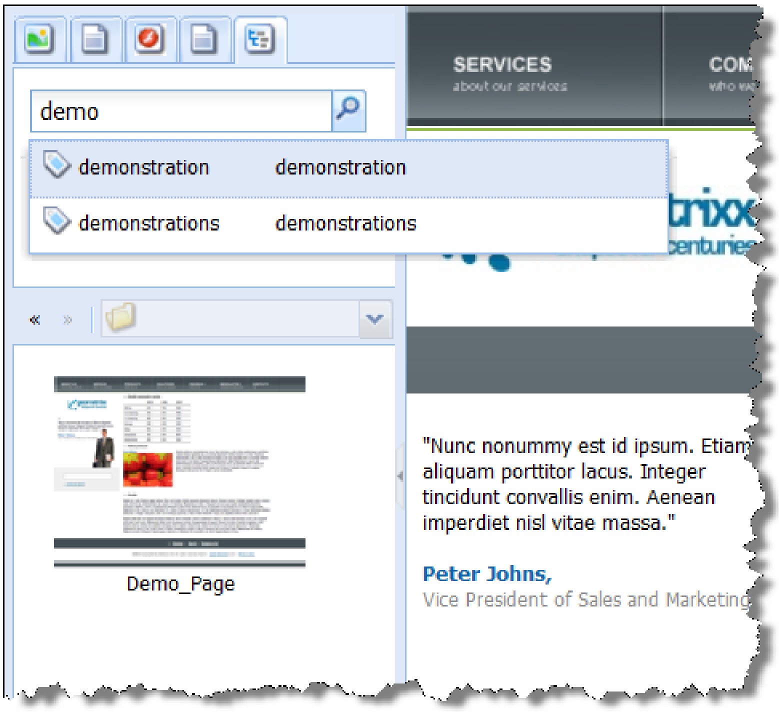


3.4.6 Using Search

Enter your required search pattern (a term or sub-string) in the search box and either hit **Return**, or click

.

Any tags and any resources that match the search pattern are listed:



3.5 How To Publish Pages

This section describes how to publish pages in CQ WCM. To publish a page, you activate its contents. Conversely, to remove a page from publication, you deactivate its contents.

When you are working on pages that you are modifying, you can lock the pages so other users cannot make changes or accidentally activate the content. In addition, you preview a page before publishing by selecting Preview Mode in the sidekick.

If you are a system administrator and need to test the publish environment, see How to install CQ5 author and publish instances.

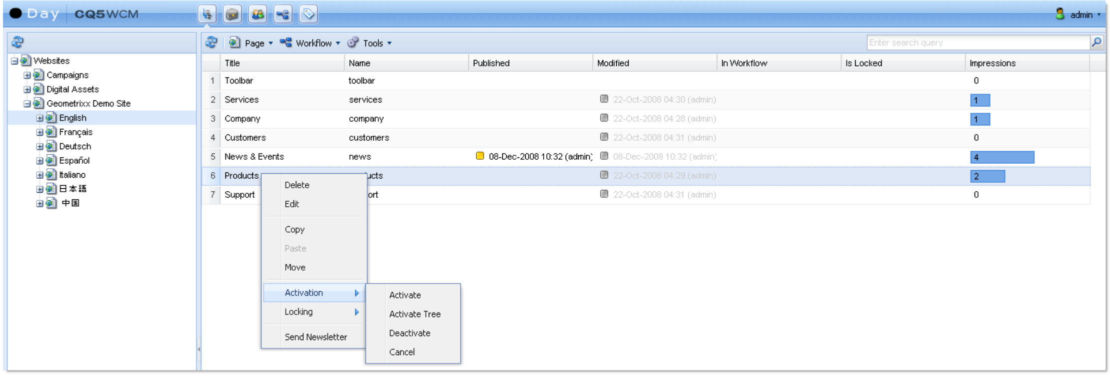
3.5.1 Activating Content

You activate pages in the wcm/siteadmin window. After you have opened a page and modified its contents, you return to the wcm/siteadmin window to activate the content of that page or of an entire tree of pages.

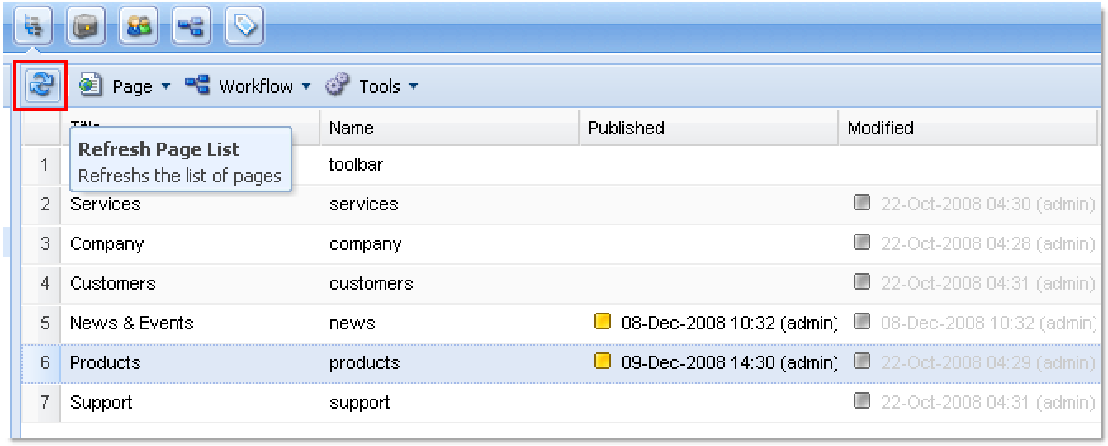
To activate page content:

1. In the siteadmin/wcm window, select the page that you want to activate.

2. In the **`Page`** menu, select **`Activation`** and then either **`Activate`** or **`Activate Tree`**. To activate the content of only that page, select **`Activate`**. To activate the content of the page and all its sub-pages, click **`Activate Tree`**. If you want to cancel the activation, click **`Cancel`**.



3. CQ WCM activates the selected content. To see that the page and its sub-pages (if selected) have been published, **refresh** the page. The published page or pages appears in the siteadmin/wcm window with information about who activated the content as well as date and time of activation.



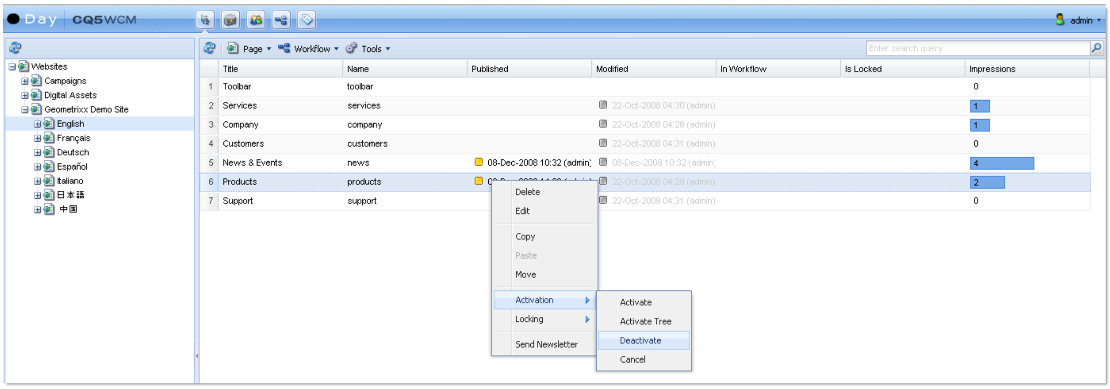
3.5.2 Deactivating Content

To remove a page from the publish environment, you deactivate the content.

To deactivate a page:

1. In the siteadmin/wcm window, select the page that you want to deactivate.

2. In the **Page** menu, select **`Activation`** and then **`Deactivate`**.



3. Refresh the siteadmin/wcm window and the content is no longer published.

3.5.3 Determining Page Publication Status

The colors next to pages in the siteadmin/wcm window indicate publication status.

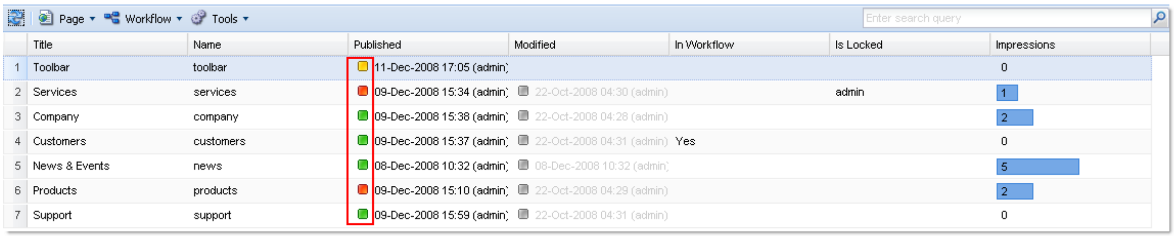


Table 3.3.

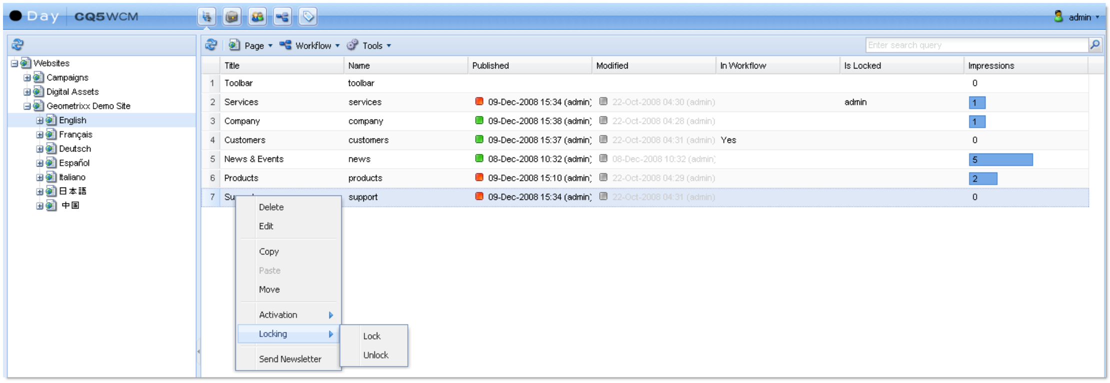
Color	Description
Green	Publication was successful. Content is published.
Yellow	Publication is pending. Confirmation of publication has not yet been received by the system.
Red	Publication failed. There is no connection with the publish instance. This can also mean that the content was deactivated.

3.5.4 Locking Pages

To lock a page that you are working on so no one can modify the contents or activate it:

1. In the siteadmin/wcm window, select the page that you want to lock.

2. In the **Page** menu, select **`Locking`** and then **`Lock`**. That page is locked to other users.



3. CQ WCM displays the page as locked and indicates which user has locked the page.

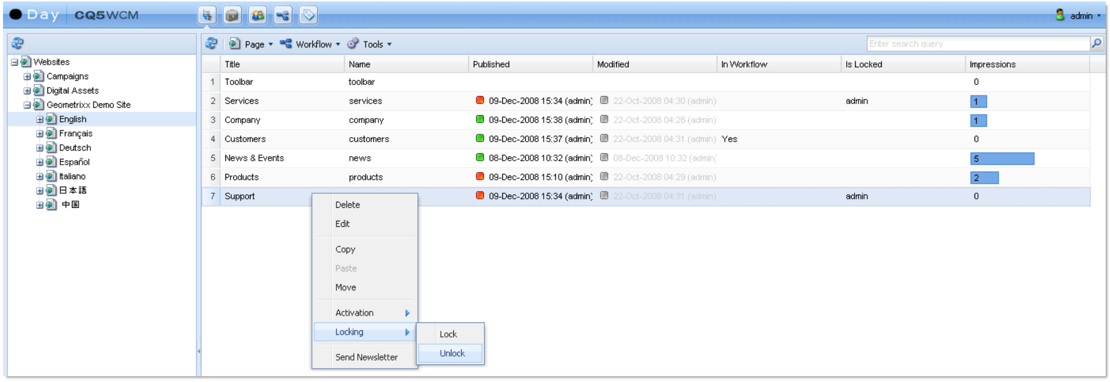
3.5.5 Unlocking Pages

You can only unlock locked pages if you locked the page or if you have administrator privileges.

To unlock a page:

1. In the siteadmin/wcm window, select the page you want to unlock.

2. In the **Page** menu, select **`Locking`** and then **`Unlock`**. CQ WCM indicates that the page is no longer locked.

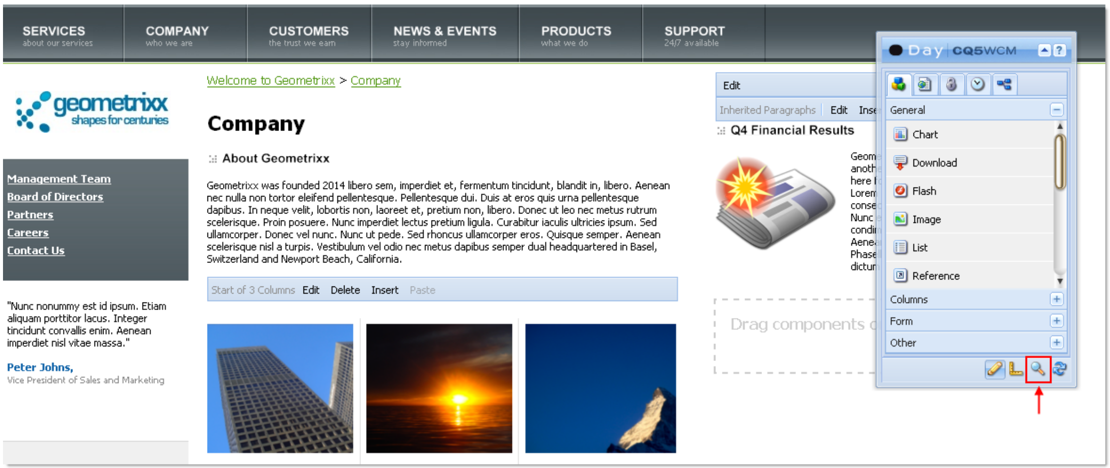


3.5.6 Using Preview Mode

This mode allows you to preview the page as if it were appearing on your website in its final form.

To access Preview mode:

1. In the siteadmin/wcm window, open the page you want to view in Preview mode.



2. In the sidekick, click the magnifying glass (preview mode). CQ WCM displays the page as it appears on your web site in its final form.

3.6 How To Restore Pages

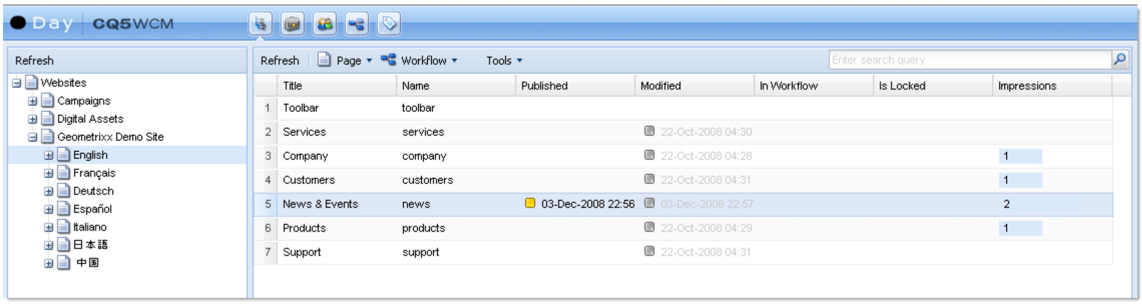
This section describes how to restore pages that have been previously deleted.

Note

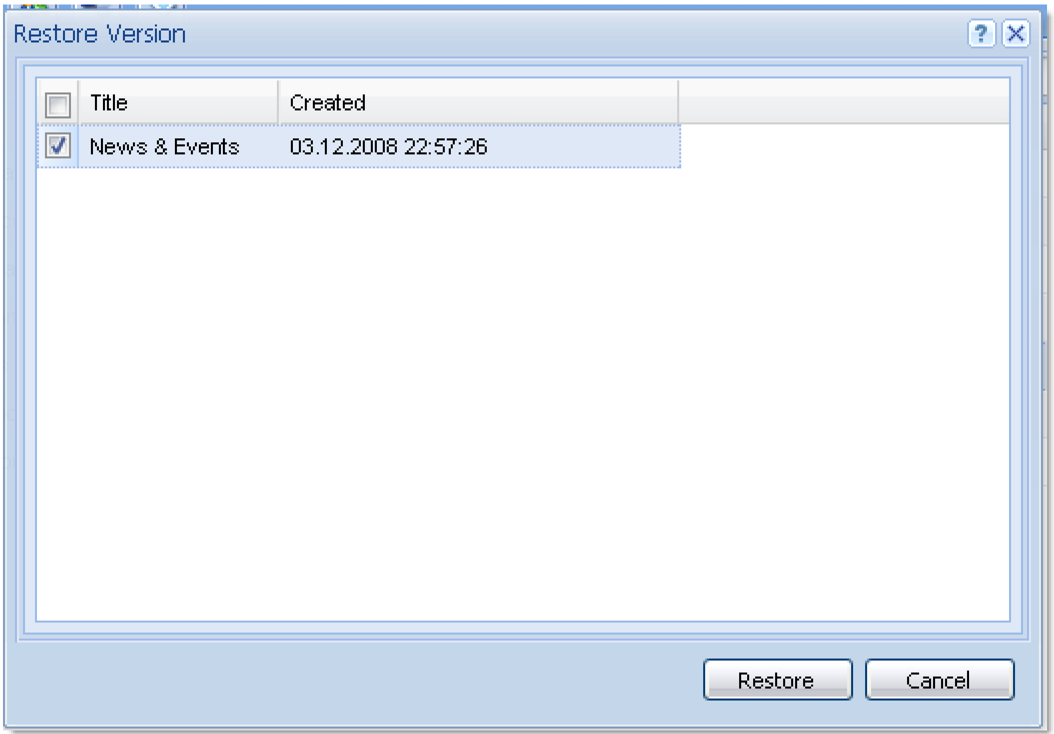
Only pages that have been previously activated can be restored. Each time you activate a page or tree, CQ WCM creates a new version of that page or tree.

To restore a page to a previous version:

1. In the wcm/siteadmin window, navigate to the page you want to restore and select it.



2. In the **Page** menu, select **Restore** and then **Version** or **Tree**. Selecting **Version** lists previous versions of the document. Selecting **Tree** lists previous version of the content tree.



3. Click **Restore**. CQ WCM restores the version or tree to the one you selected.

4 Default Components

CQ WCM comes with a variety of out-of-the-box components that provide comprehensive functionality for website authors. These components and their usage within the installed "Geometrixx" website are a reference on how to implement and use components. The components are provided with all source code and can be used “as is” or as starting point for modified or extended components.

The following section includes an overview of all default components as well as a description of each component item and examples of what the components look like in CQ5.

Components include many standard components, but to develop your own components, see the section called “Developing Components”.

When working with any components, you can add them either by double-clicking **`Drag components or assets here`** or dragging and dropping the component from the side bar onto the page.

4.1 Overview of components

The following components are included in the basic installation within the Geometrixx website:

Note

This table lists all components - some of which are also Templates.

Table 4.1. Components within CQ5 (/apps/geometrixx/components and /libs/foundation/components)

Title	Component	Location	Purpose	Equivalent in CQ4
Breadcrumb	breadcrumb	libs	Generates breadcrumb navigation.	breadcrumb
Chart	chart	libs	Chart, line or pie chart.	
Column Control 2 Columns 3 Columns	parsys/colctrl	libs	Mechanism for controlling and formatting columns. 2 and 3 Columns are the same component, but default to 2 and 3 columns respectively.	columncontrol
Content Page	contentpage (template)	G	The content page template.	
Download	download	libs	Enables access to a file made available for download.	download
Flash	flash	libs	Allows you to enter a flash movie.	
Forms Address Field	form/address	libs	A complex field allowing the input of an international address.	forms
Forms Begin	form/start	libs	Begins the form definition.	forms
Forms Captcha	form/captcha	libs	A field consisting of an alphanumeric word that refreshes automatically. The captcha component protects websites against bots.	
Forms Checkbox Group	form/checkbox	libs	Multiple items organized into a list and preceded by check boxes.	

Title	Component	Location	Purpose	Equivalent in CQ4
			Users can select multiple check boxes.	
Forms Dropdown List	form/dropdown	libs	Multiple items organized into a drop-down list. The **`Multi Selectable`** switch specifies if several elements can be selected from the list.	
Forms End	form/end	libs	Terminates the form definition.	forms
Forms File Upload	form/upload	libs	An upload element that allows the user to upload a file to the server.	
Forms Hidden Field	form/hidden	libs	This field is not displayed to the user. It can be used to transport a value to the client and back to the server. This field should have no constraints.	
Forms Image Button	form/ imagebutton	libs	An additional submit button for the form that is rendered as an image.	
Forms Password Field	form/password	libs	Same as text field but only a single line is allowed and the text input from the user is not visible in the field.	
Forms Radio Group	form/radio	libs	Multiple items organized into a list preceded by a radio button. Users must select only one radio button.	
Forms Submit Button	form/submit	libs	An additional submit button for the form where the title is displayed as text on the button.	
Forms Text Field	form/text	libs	Text field that users enter information into.	
Header	header	G	Page header used for the home page.	
Home Page	homepage	G	The home page template.	
Image	image	libs	Displays an image, with accompanying text positioned to the right.	image
Iparsys	iparsys	libs	Inherited paragraph system	
List	list	libs	Displays a configurable list of searched items.	generic list
List Children	listchildren	G	Generates a list of all pages beneath the current.	listchildren
Logo	logo	libs	Logo.	logo
	page	libs		
	parbase	libs		
	parsys	libs		
Redirect	redirect (template)	libs	Redirect. Component and Template.	
Reference	reference	libs	Reference.	

Title	Component	Location	Purpose	Equivalent in CQ4
Search	search	libs	A search dialog with related search functionality.	search
Sitemap	sitemap	libs	A sitemap listing all pages.	
Slideshow	slideshow	libs	Allows you to load a slideshow.	
Table	table	libs	A table, with various formatting options.	table
Teaser	teaser	libs	A piece of content, often an image displayed on a main page intended to 'tease' users into accessing the underlying content.	
Text	text	libs	A text item.	richtexteditor
Text Image	textimage	libs	Text with an accompanying image.	textimagejcr
Title	title	libs	Title of the page (can be different from the page name)	
Toolbar	toolbar	libs	A toolbar	
Top Navigation	topnav	libs	Navigation at the top of the page.	topnavigation

Note

Location indicates the location of the component within the repository

libs = included in the standard library (`/libs/foundation/components`)

G = included with Geometrixx (`/apps/geometrixx/components`)

4.2 Standard Library Components (paragraph system)

The following components are part of the standard library of components available in CQ5 and are available in the paragraph system (parsys). They are located in the **`libs`** folder. Within the siteadmin, they are available from the components tab of the sidekick, sorted according to four categories:

- General: Includes basic components, including text, images, tables, charts, and so on.
- Columns: Includes components necessary for organizing the layout of the content.
- Form: Includes all the components needed to create a form.
- Other: Includes gadget, search, and tag cloud components.

4.2.1 General

The General components are the basic components that you use to create content, excluding forms, column layout, and specialized components such as tag clouds, search, and gadgets.

4.2.1.1 Chart

The Chart component lets you add a bar, line, or pie chart. CQ WCM creates a chart from the data you provide. You provide data by typing directly into the Data tab or by copying and pasting a spreadsheet.

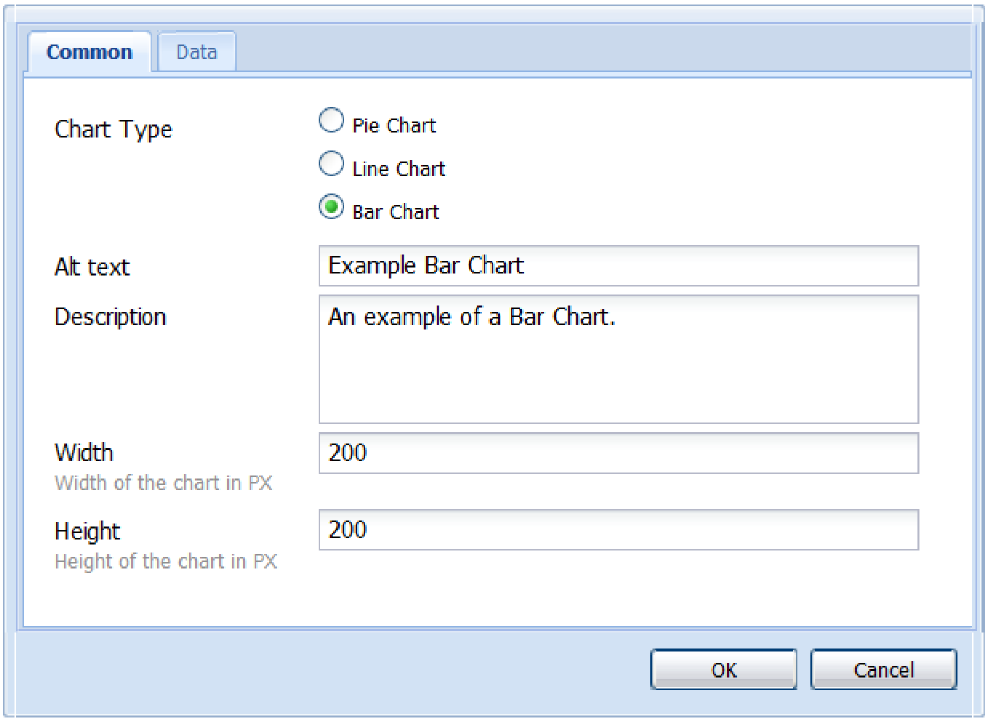


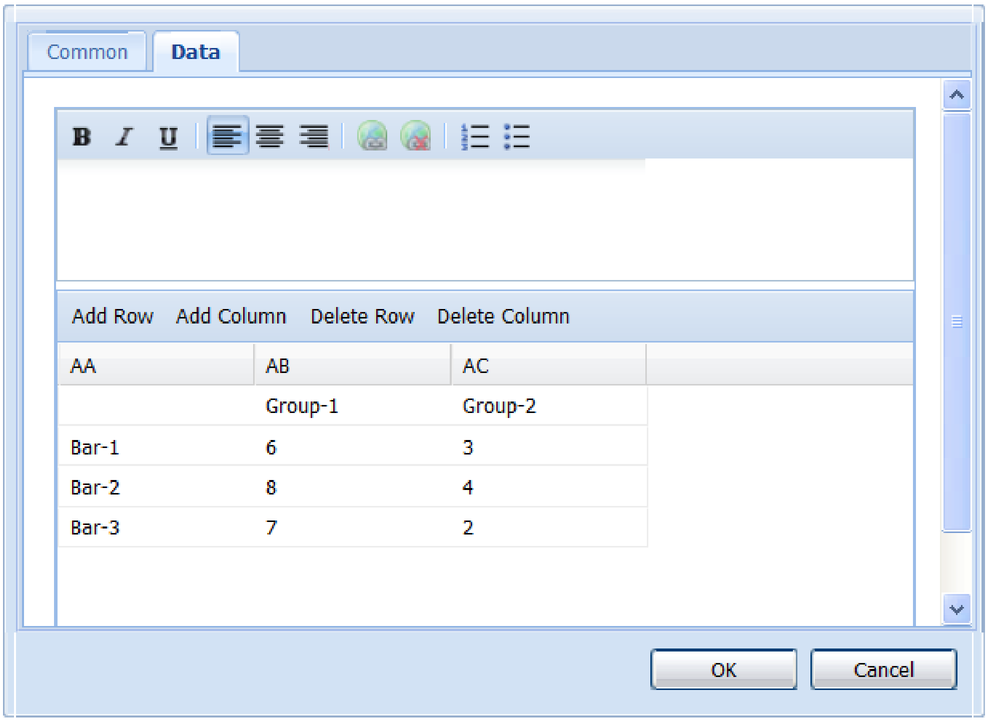
Chart Type
: Select from Pie Chart, Line Chart, and Bar Chart.

Alt text
: Alternative text that displays instead of the chart.

Description
: Optional description of the chart.

Width
: Width of the chart in pixels.

Height
: Height of the chart in pixels.



Rich Text Editor

The area at the top of the dialog is for editing the contents of the currently selected cell.

Add Row

Adds a row to the chart.

Add Column

Adds a column to the chart.

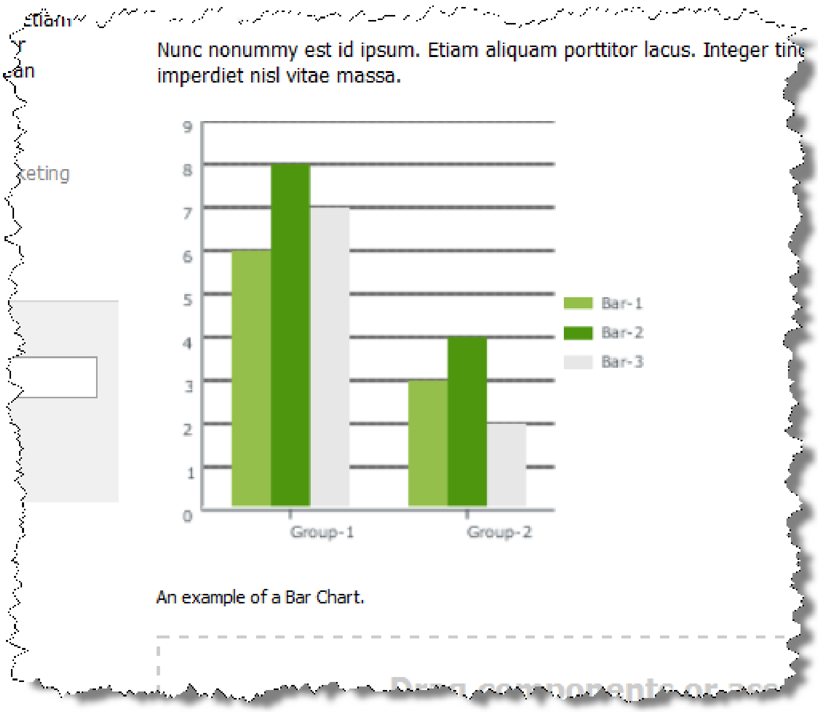
Delete Row

Deletes a row from the chart.

Delete Column

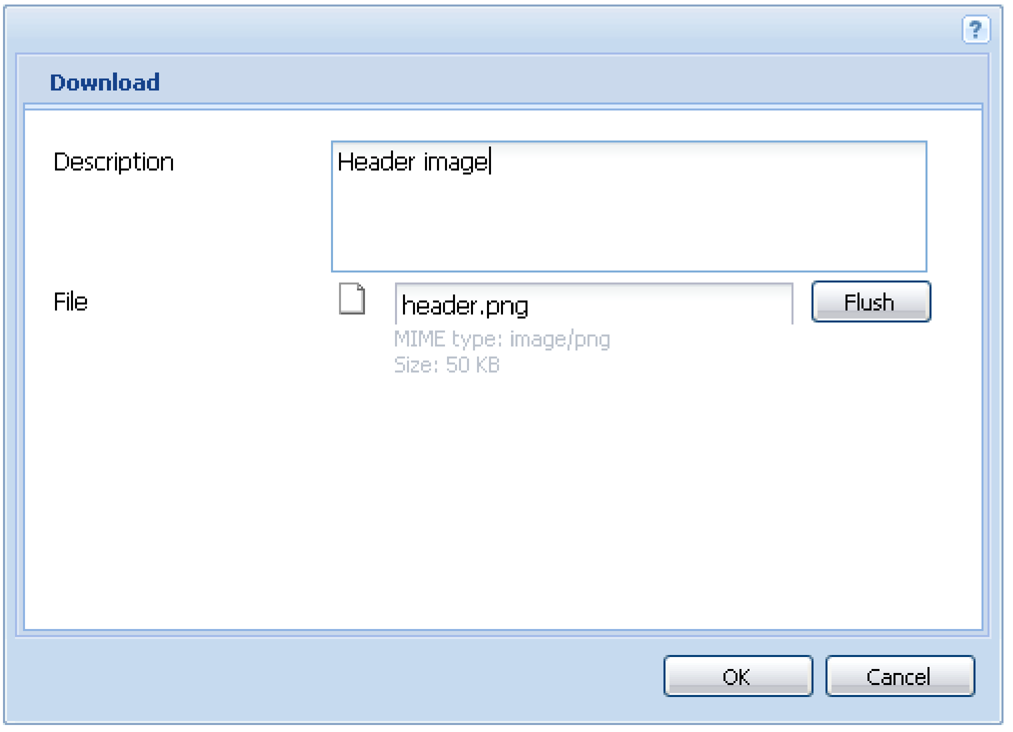
Deletes a column.

The following example is a Bar chart in Geometrixx. It shows the relationships between the table (as in the previous screenshot) and the finished chart:



4.2.1.2 Download

The Download component creates a link on the selected web-page to download a specific file. You can either drag an asset from the Content Finder or upload a file.

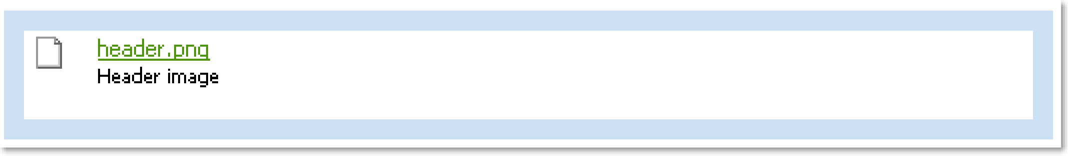


Description
: A short description displayed with the download link.

File
: File available for download on the resulting web-page.

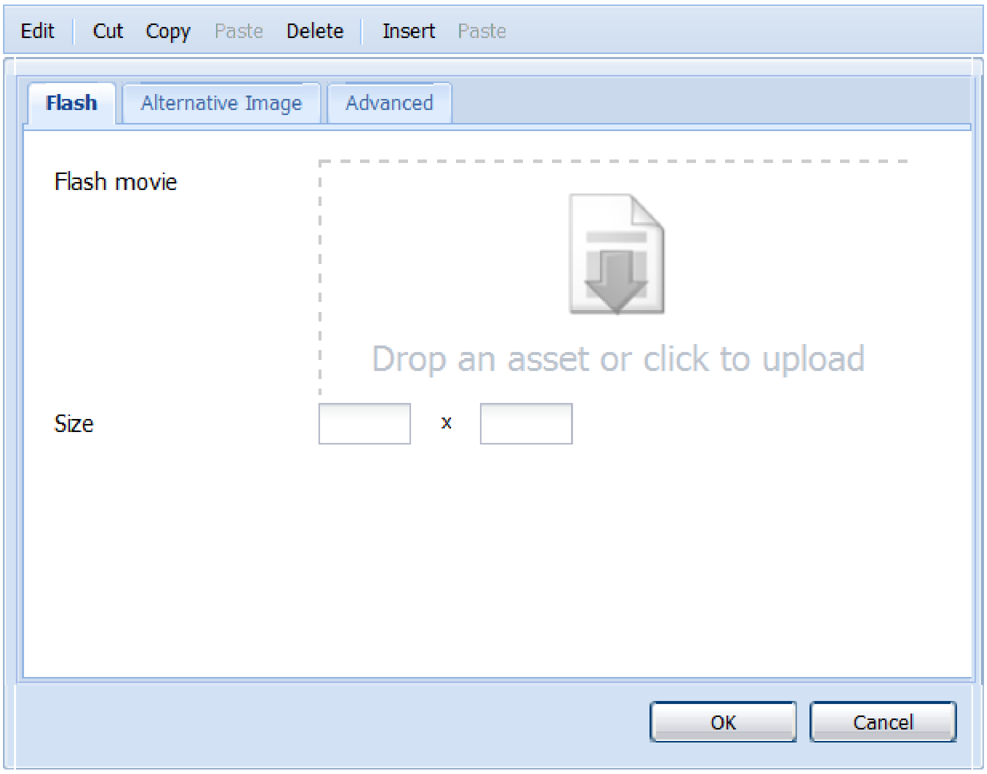
Drag an asset from the content finder or click the area to upload the file to be available for download.

The following example shows the Download component in Geometrixx:



4.2.1.3 Flash

The Flash component lets you load a Flash movie. You can drag a flash asset from the content finder onto the component, or you can use the dialog:



Flash movie
: The flash movie file. Either drag an asset from the content finder, or click to open a browse window.

Size
: Dimensions in pixels of the display area holding the movie.

Alternative Image
: An alternative image to be shown.

Advanced menu
: Includes all of the following:

  Context menu
  : Indicates whether the context menu should be shown or hidden.

  Window Mode
  : How the window appears, for example opaque, transparent, or a distinct (solid) window.

Background color
A background color selected from the color chart provided.

Minimum version
The minimum version of Adobe Flash Player required to run the movie. The default is 9.0.0.

Attributes
Any further attributes required.

4.2.1.4 Image

The image component displays an image and accompanying text according to the specified parameters. You can either drag and drop and image from the Content Finder or click to upload an image.

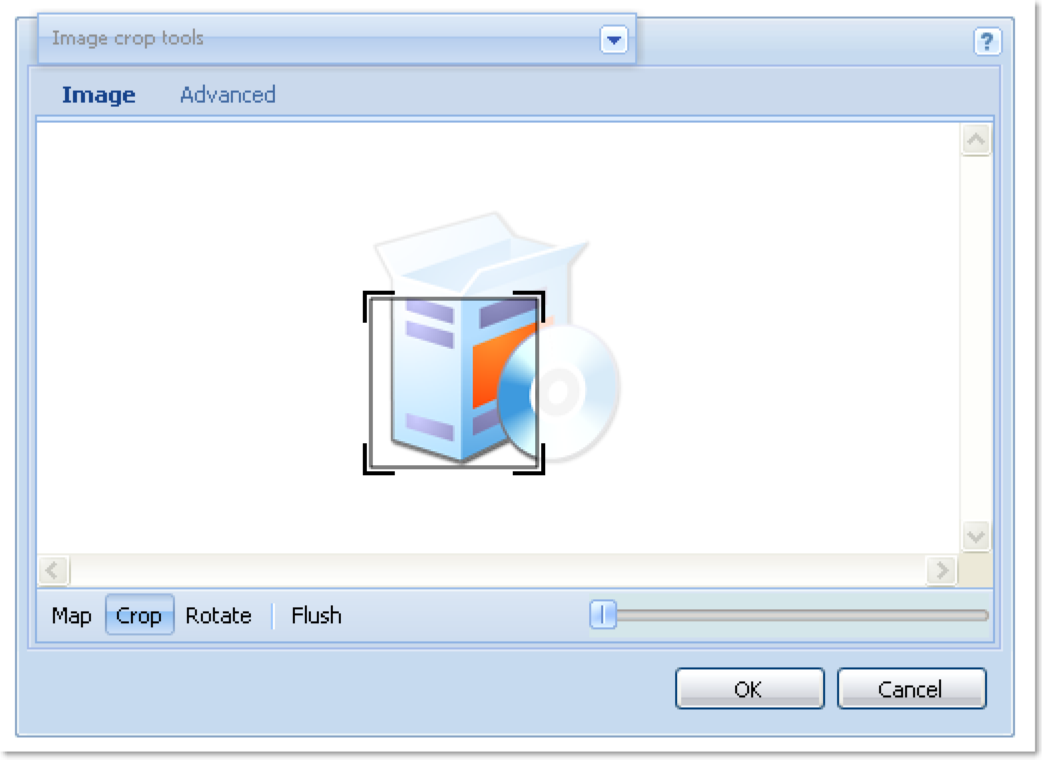


Image
You can drag an image from the content finder, or click to open a browse window where you can load an image. After the image is loaded, you can create a clickable image map, crop the image, rotate it, or delete it. To zoom in and out of the image, use the slide bar beneath the image (above the **OK** and **Cancel** buttons)

Map
To map an image, click **Map**. You select how you want to create the image map (rectangle, polygon, and so on) and specify where the area should point to.

Crop
Click **Crop** to crop an image. Use your mouse to crop the image.

Rotate
To rotate an image, click **Rotate**. Click **Rotate** repeatedly until the image is rotated the way you want it.

Advanced
These tools include the title, description, and the size.

Title
    The title of the image.

Description
    A description of the image.

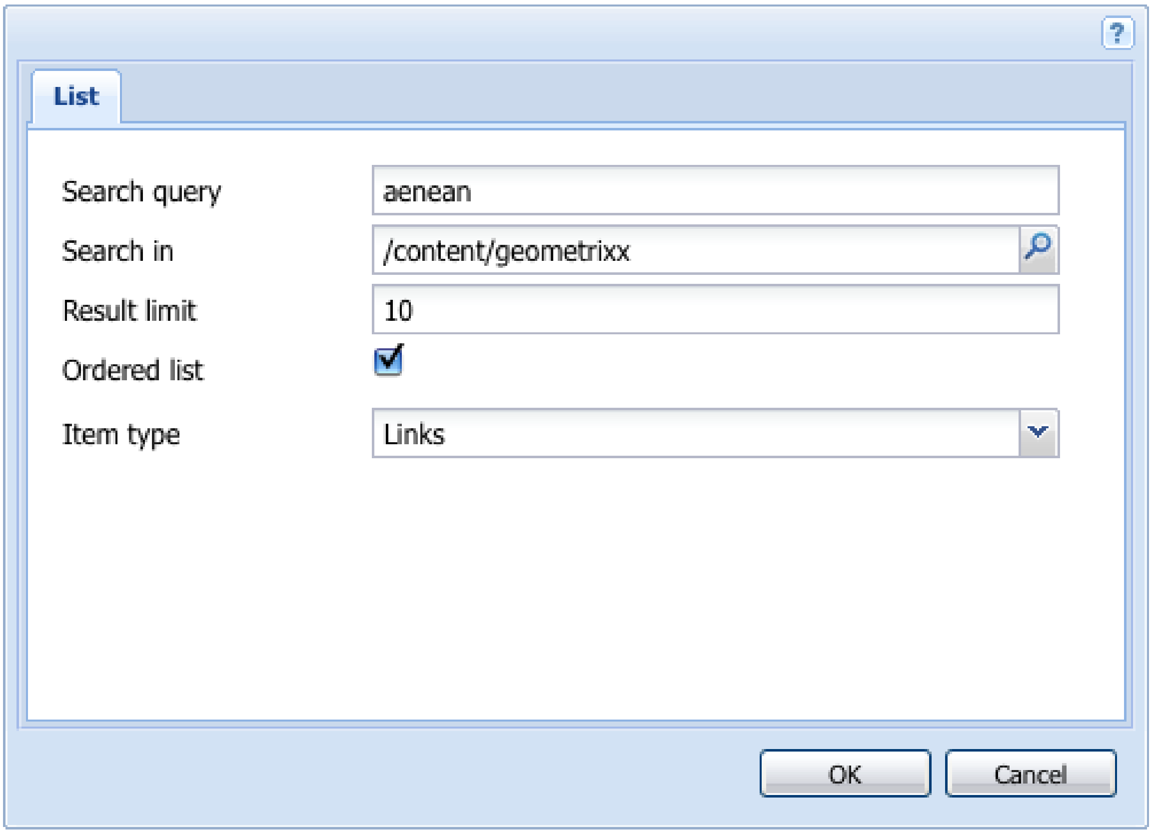
Size
    Sets the height and width of the image.

The following example is an image component used in Geometrixx:

This image represents a box of software.

4.2.1.5 List

The List component allows you to configure search criteria for displaying a list:



Search query
    Here you specify the search term. This may be a simple character string, such as “aenean”, or may have a search-prefix, for example “in:”, “tag:” or “title:” amongst others.

Search in
    This specifies the path the search is to occur in. You can either type the complete path directly or type several characters, then use

for auto-suggestion.

Result limit
Specify the maximum number of items that you want shown.

Ordered list
Whether the list is to be ordered.

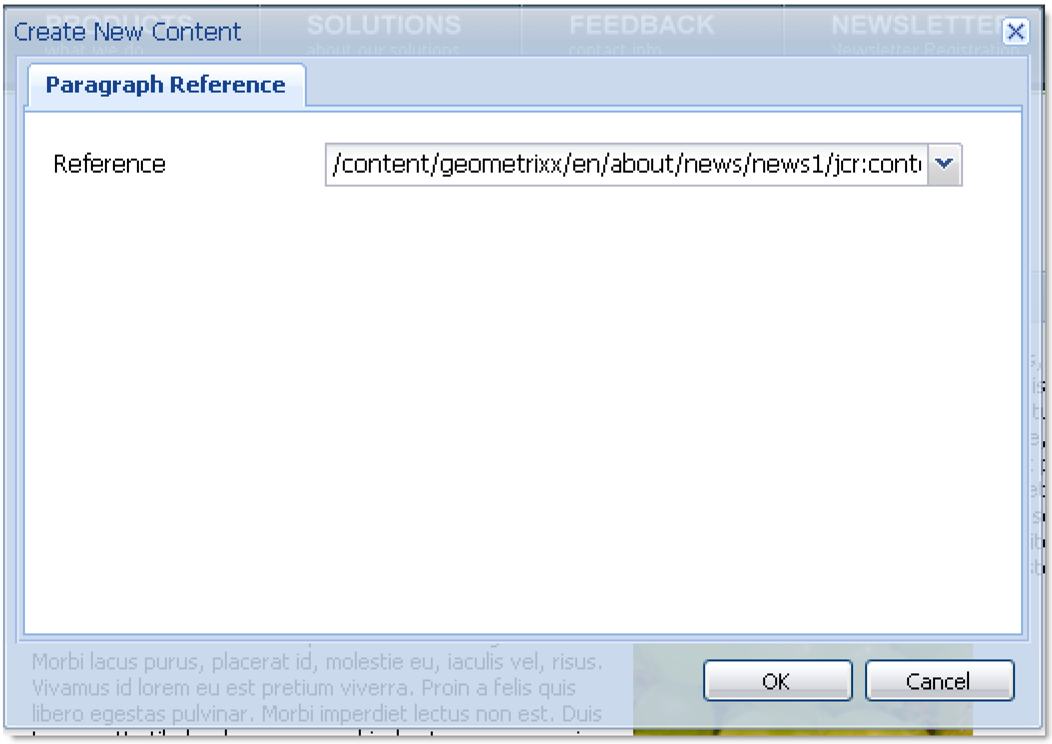
Item type
The type of items you want to list; include Links, Teasers and News.

The following example shows a List component used in Geometrixx, configured as above:

1. English
2. 日本語
3. Français
4. Español
5. 中国
6. Deutsch
7. Italiano
8. Board of Directors
9. GeoCube 2.0
10. Board of Directors

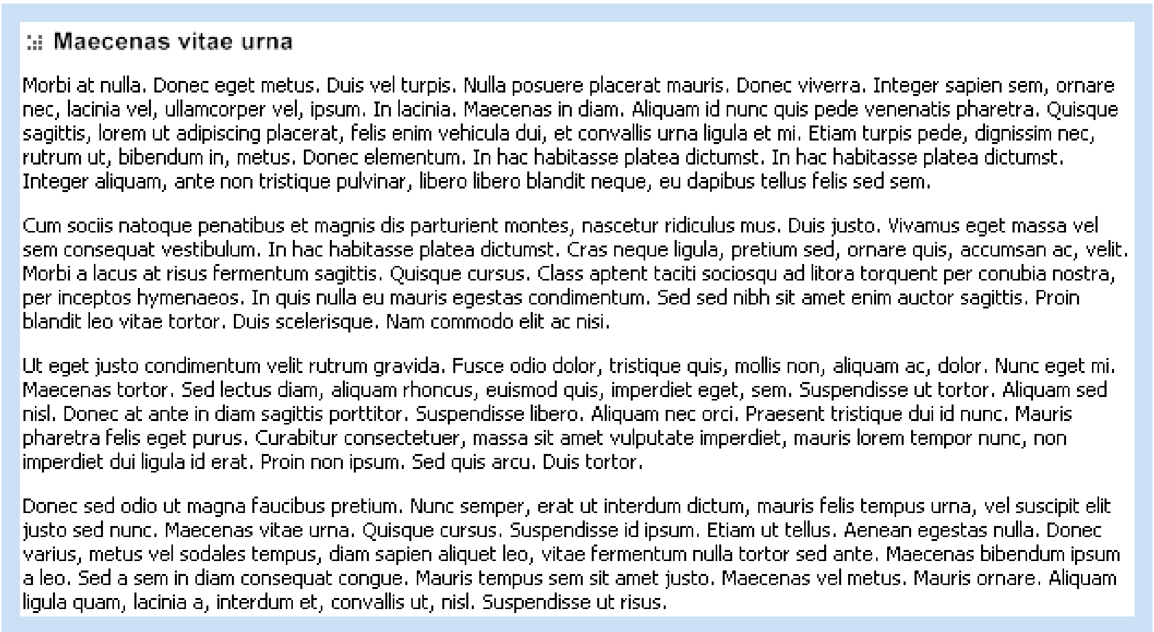
4.2.1.6 Reference

The Reference component lets you reference text in another part of the CQ5 site.



Reference
: Click to access a tree of the site pages. Select a page and click **OK**.

The following example shows the Reference component used in Geometrixx (a text element referenced from another page):



Maecenas vitae urna

Morbi at nulla. Donec eget metus. Duis vel turpis. Nulla posuere placerat mauris. Donec viverra. Integer sapien sem, ornare nec, lacinia vel, ullamcorper vel, ipsum. In lacinia. Maecenas in diam. Aliquam id nunc quis pede venenatis pharetra. Quisque sagittis, lorem ut adipiscing placerat, felis enim vehicula dui, et convallis urna ligula et mi. Etiam turpis pede, dignissim nec, rutrum ut, bibendum in, metus. Donec elementum. In hac habitasse platea dictumst. In hac habitasse platea dictumst. Integer aliquam, ante non tristique pulvinar, libero libero blandit neque, eu dapibus tellus felis sed sem.

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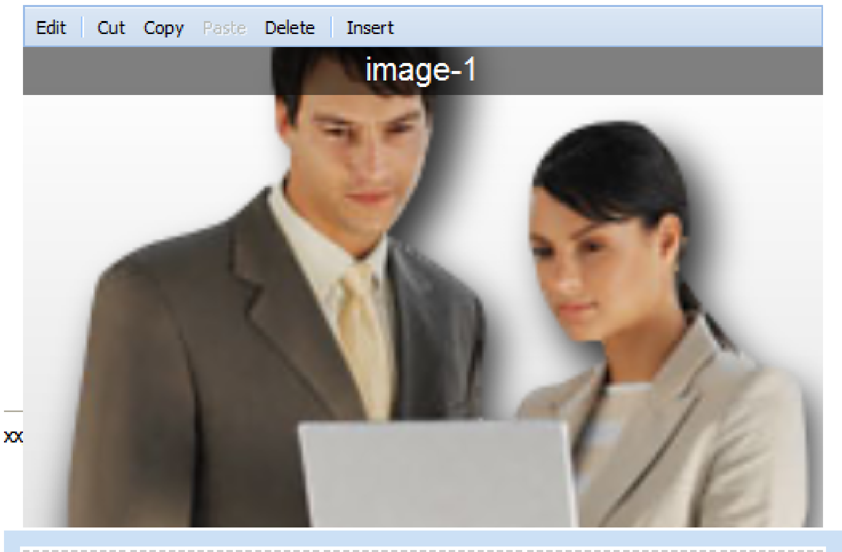
Donec sed odio ut magna faucibus pretium. Nunc semper, erat ut interdum dictum, mauris felis tempus urna, vel suscipit elit justo sed nunc. Maecenas vitae urna. Quisque cursus. Suspendisse id ipsum. Etiam ut tellus. Aenean egestas nulla. Donec varius, metus vel sodales tempus, diam sapien aliquet leo, vitae fermentum nulla tortor sed ante. Maecenas bibendum ipsum a leo. Sed a sem in diam consequat congue. Mauris tempus sem sit amet justo. Maecenas vel metus. Mauris ornare. Aliquam ligula quam, lacinia a, interdum et, convallis ut, nisl. Suspendisse ut risus.

4.2.1.7 Sitemap

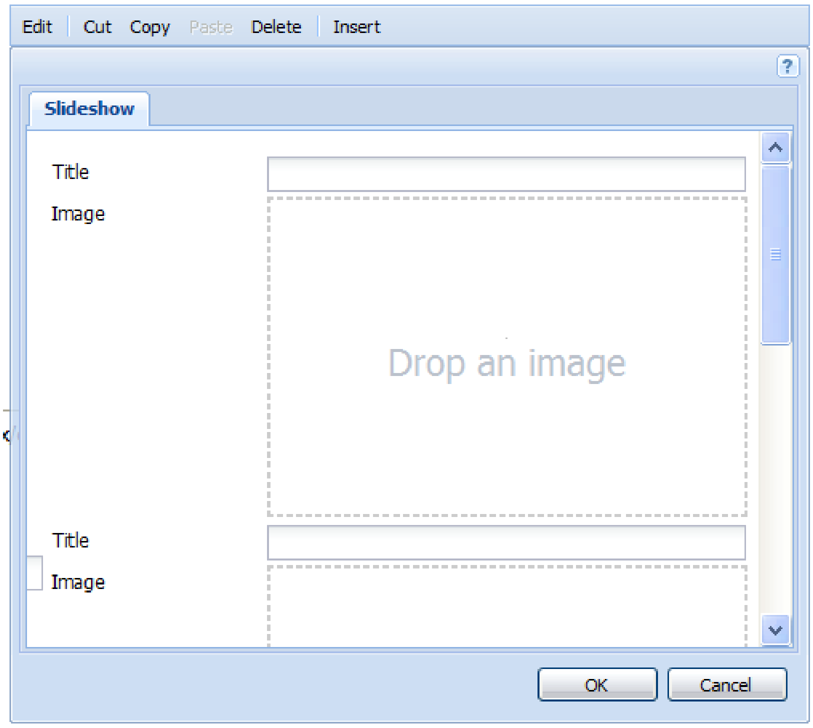
An automatic sitemap listing all pages (with active links) in the current website:

4.2.1.8 Slideshow

This component allows you to load a series of images to be displayed as a slideshow on your page. You can configure up to three images with title, the slideshow component then repeatedly displays each in sequence, for a short period of time:



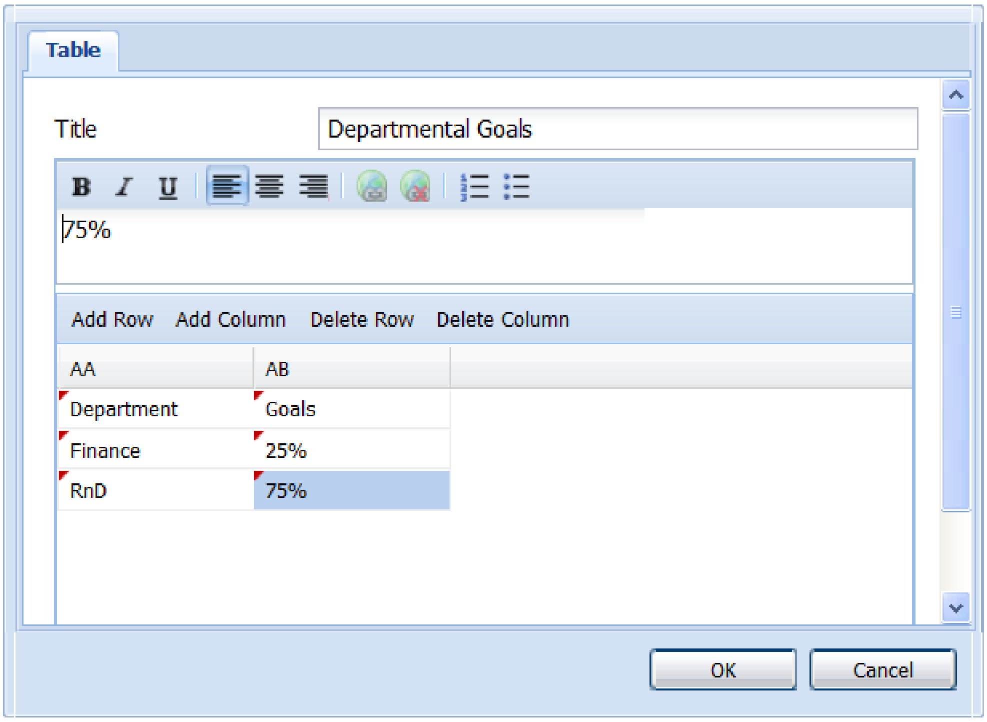
You can select up to three images, assign each a title and also specify the size of the display area.



4.2.1.9 Table

The table component lets you add a table. You can create a table component, either by copying and pasting a spreadsheet or a table from another external editor, such as Notepad into CQ WCM, or you can create one from scratch. Using **Tab** in the table component moves you from field to field and does not create separate columns in a table.

If you are typing the table contents directly into the table, you manually add rows and columns by clicking the appropriate button. Put the cursor in the cell you want to add text to and type the information into the Rich Text Editor. The information appears in the selected cell.



Title
A title for the table.

Rich Text Editor
The area at the top of the dialog is for editing the contents of the currently selected cell. You can edit how the text appears (bold, italics, underline), how the text in the cell is aligned, add hyperlinks, and add numbered and bulleted lists to the cells.

Add Row
Adds a row to the table.

Add Column
Adds a column to the table.

Delete Row
Deletes a row from the table.

Delete Column
Deletes a column from the table.

First Row contains headers
Select this check box if the first row is a header row.

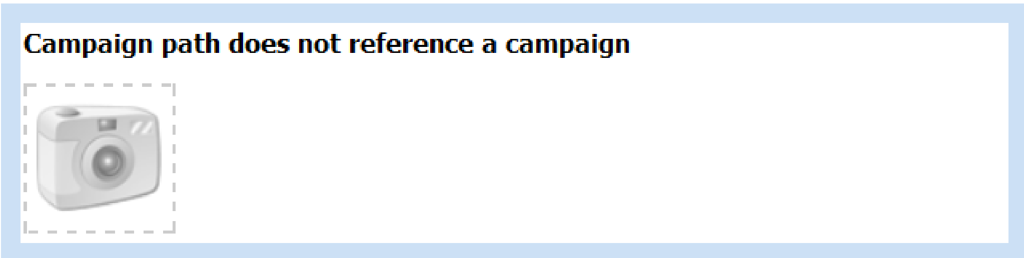
The following example shows the table component in Geometrixx:

Department	Goals
Finance	25%
RnD	75%

4.2.1.10 Teaser

A Teaser is a piece of content (usually an image) displayed on a main page to "tease" users into accessing the underlying content.

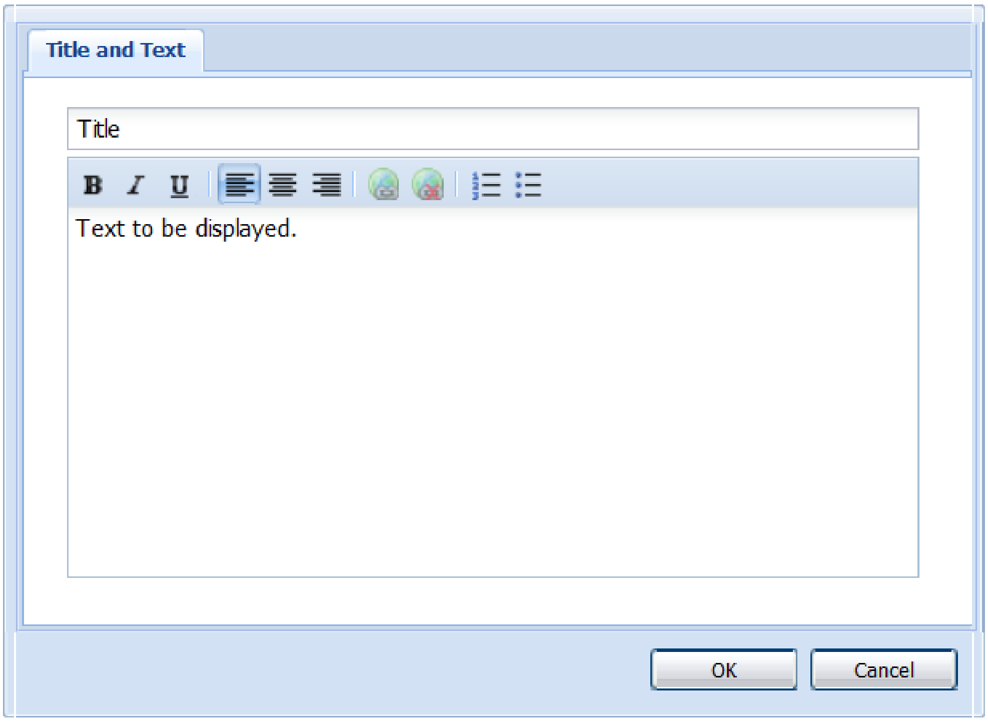
It is constructed from the *Click Stream Cloud* which is a collection of page tags that the user has accessed (by clicking). The most common theme will be used to select the target of the teaser.



You can define a text and image for the teaser.

4.2.1.11 Text

The Text component lets you enter a text block that includes a title and offers a WYSIWYG editor.



Title
: The title to be displayed above the text section.

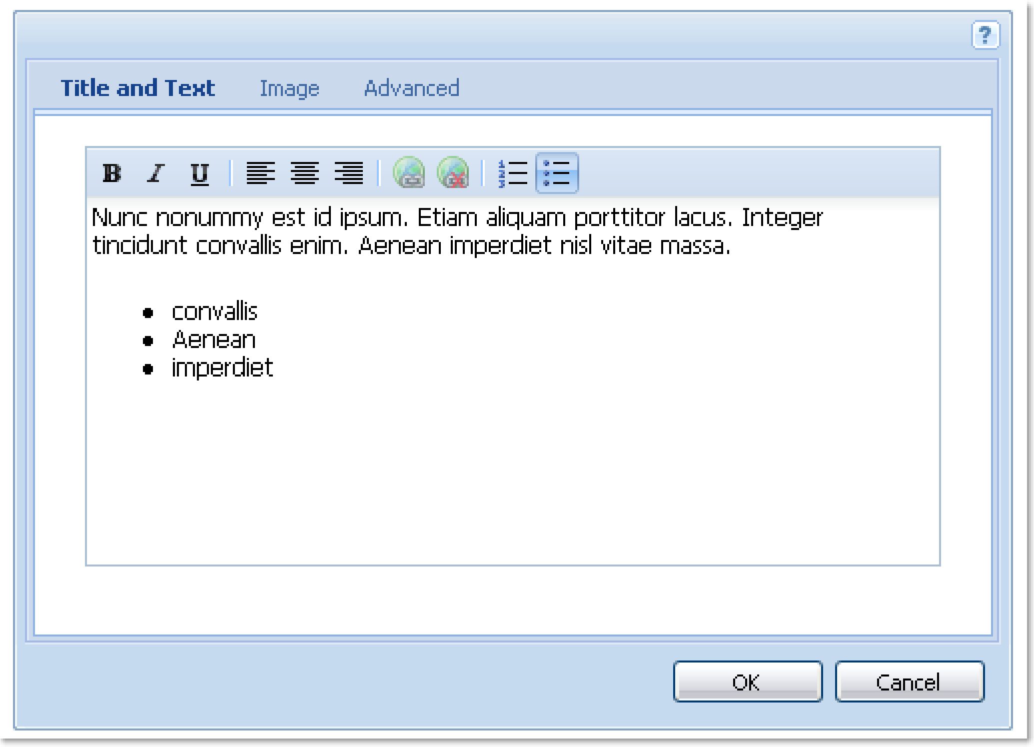
Text
: The section of text. See the Power User Guide for information on using the WYSIWYG text editor.

The following example shows the Text component used in Geometrixx:

Text to be displayed.

4.2.1.12 Text Image

The Text Image component adds a text block and an image. You can also add text and images separately. See Text and Images for details.



Title and Text
: Enter text. Use the toolbar to modify formatting, create lists, and add links.

Image
: Drag an image from the content finder, or click to browse to an image.

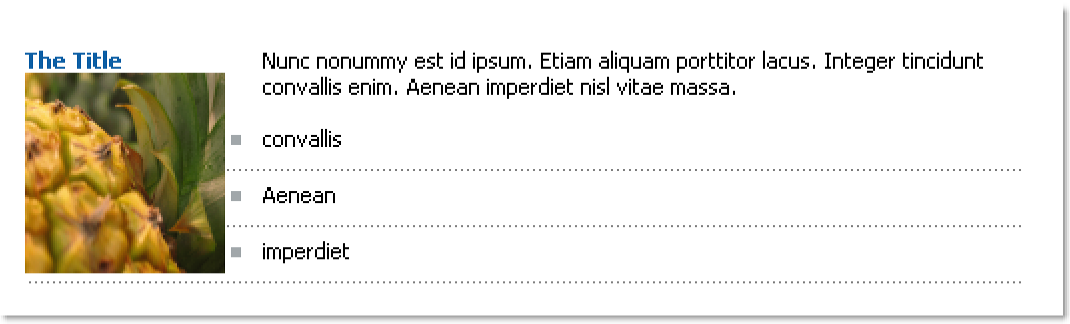
Advanced
: Includes the following:

  Title
  : Enter the title of the block

  Description
  : A description of the image.

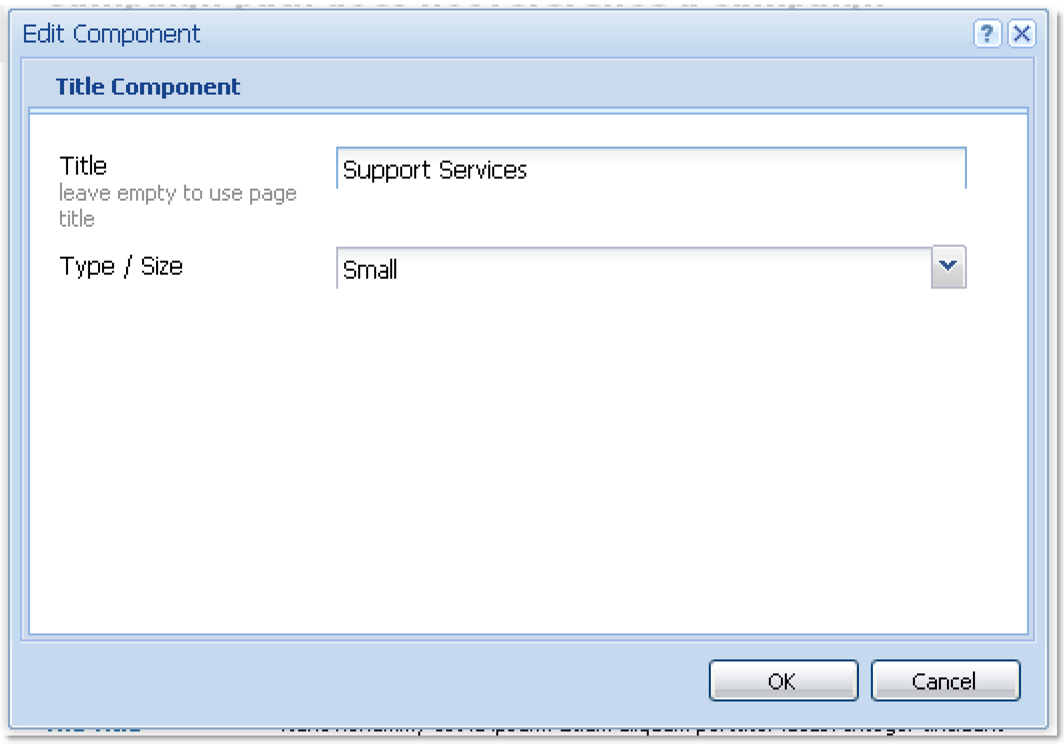
  Size
  : Sets the height and width of the image.

The following example shows a Text Image Component in Geometrixx:



4.2.1.13 Title

The title component can either display the name of the current page, or it can be modified to display a name other than the name of the page. You can also specify the size you want.



Title
: If you want to use a name other than the page title, enter it here.

Type/Size
: Select Small or Large from the dropdown list.

The following example shows a Title component in Geometrixx:

4.2.2 Columns

Columns control the layout of content in CQ WCM.

4.2.2.1 Two (2) Columns

A Column Control component that defaults to 2 columns.

4.2.2.2 Three (3) Columns

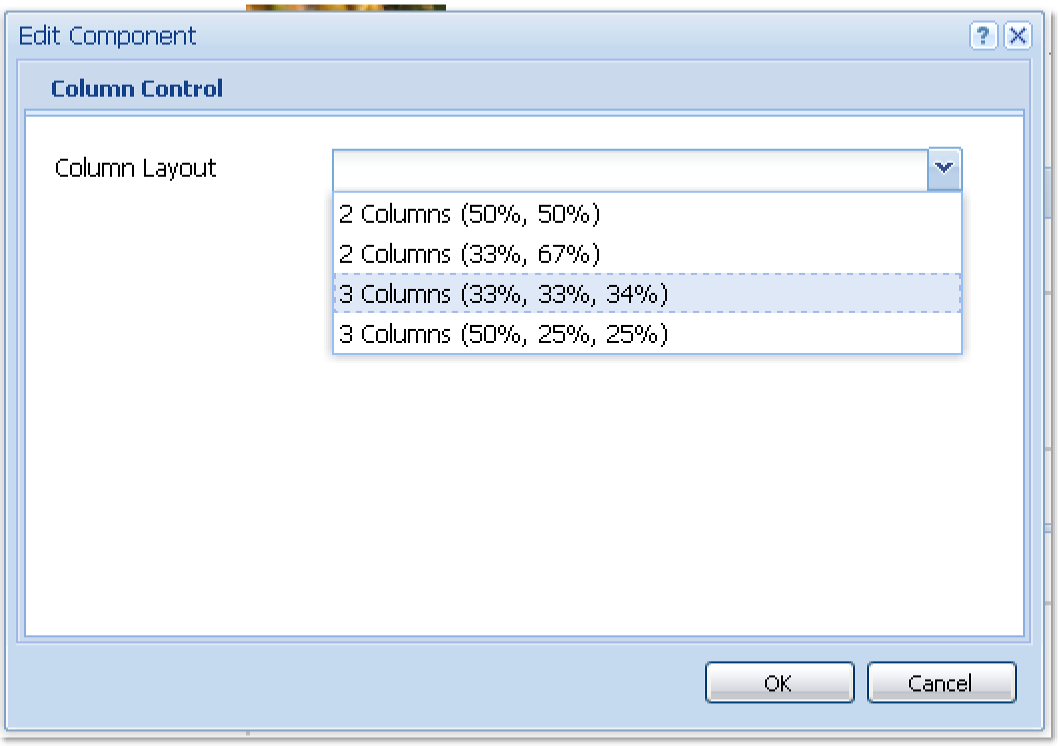
A Column Control component that defaults to 3 columns.

4.2.2.3 Column Control

The Column Control component lets users split the content in the main panel of the web-page into multiple columns. Users specify the number of columns and then create, delete, or move content within each of the columns.

Note

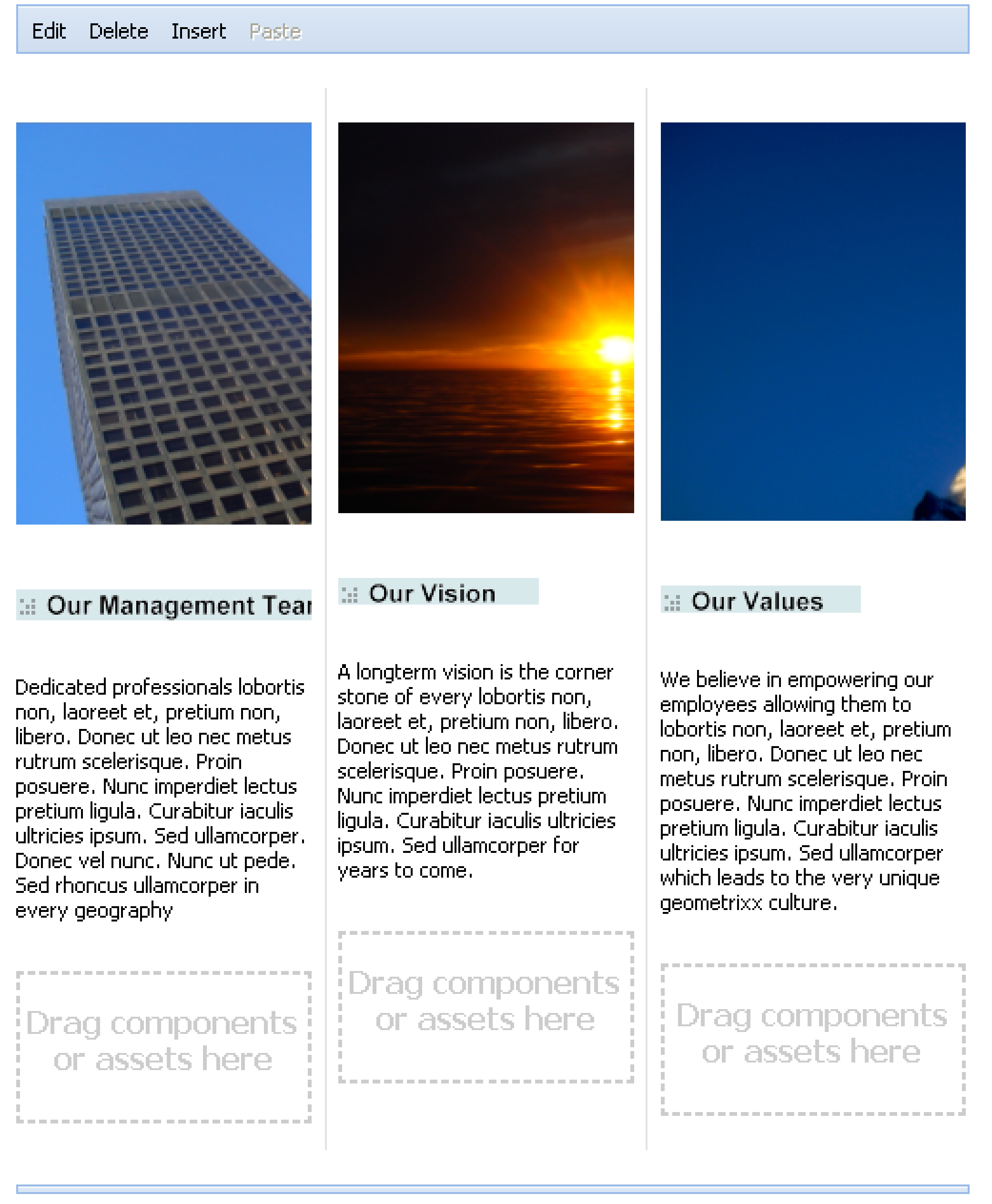
The additional components 2 Columns and 3 Columns default to the appropriate number of columns for ease of use.



Column Layout

Select the number of columns you want rendered. Once created, each column has its own **`Drag components or assets here`** link for adding content.

The following example shows the Column control component being used in Geometrixx:



4.2.3 Form

Forms create a form for visitors to submit input and include several different components:

Form Begin
: The form start defines the beginning of a new form on a page. See Form Begin.

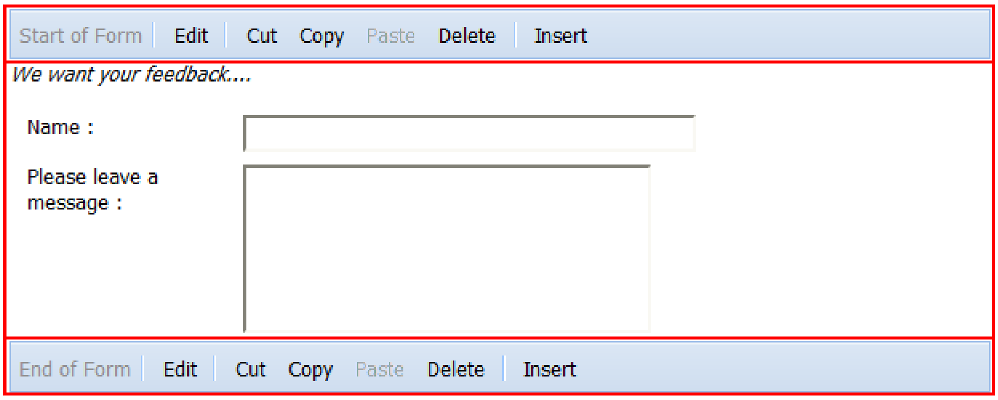
Form fields and elements
: Form fields and elements can include text boxes, radio buttons, images, and so on. The user often completes an action in a form field, such as typing text. See individual form elements for more information.

Form End
: The Form End marks the end of the form and includes a **`Submit`** button. See Form End.

Note

To create a form, you **must** include a beginning, elements, and an end. You can also have other components in between these elements, such as tables, downloads, and so on.

The following example shows an example form in Geometrixx. It is comprised of the **`Form Start`** and **`Form End`** components, with two **`Form Text Fields`**, and also one general **`Text`** field used for the lead-in text.



4.2.3.1 Common Form Fields

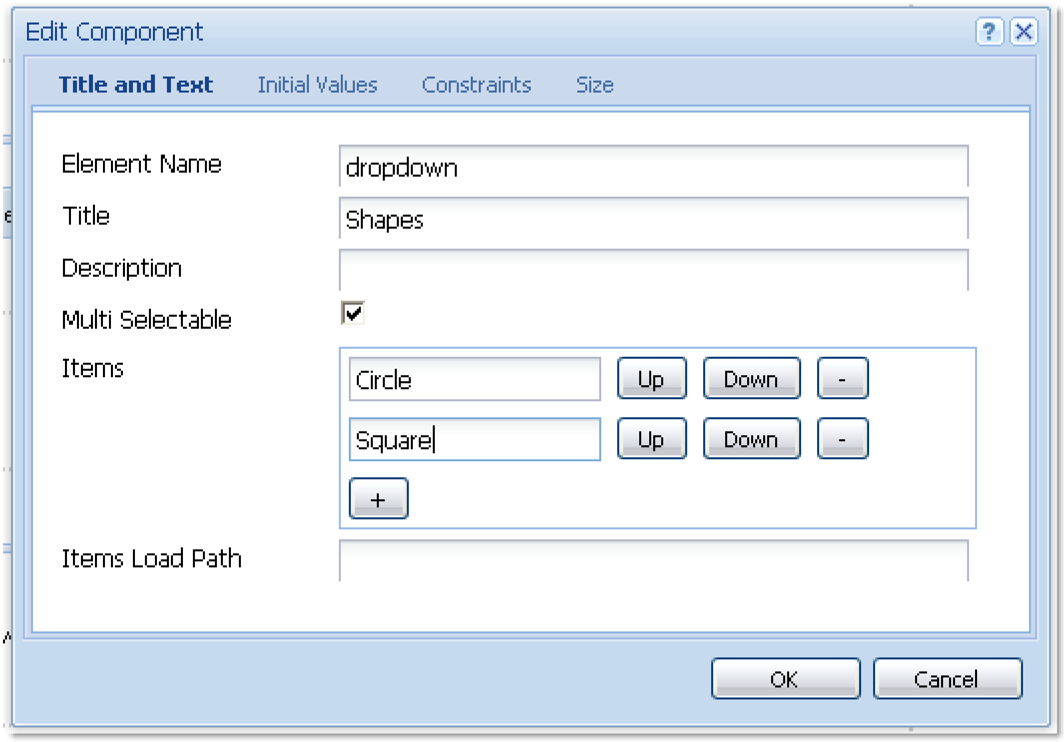
Although each of the form elements have different purposes, they are each composed of some of the following options:

- Title and Text: Includes basic information, such as the title of the form and any accompanying text.
- Initial Values: Includes a default value if specified and the load path.
- Constraints: Indicates whether a field is required and what constraints are on that field (for example, must be numeric, and so on)
- Size: Indicates the size of the fields.

Note

The fields you see vary *widely* depending on the element. Not all options are available to all components.

4.2.3.1.1 Title and Text



Element Name
: Name of the form element. This is a required field.

Title
: Changes the default title of the element.

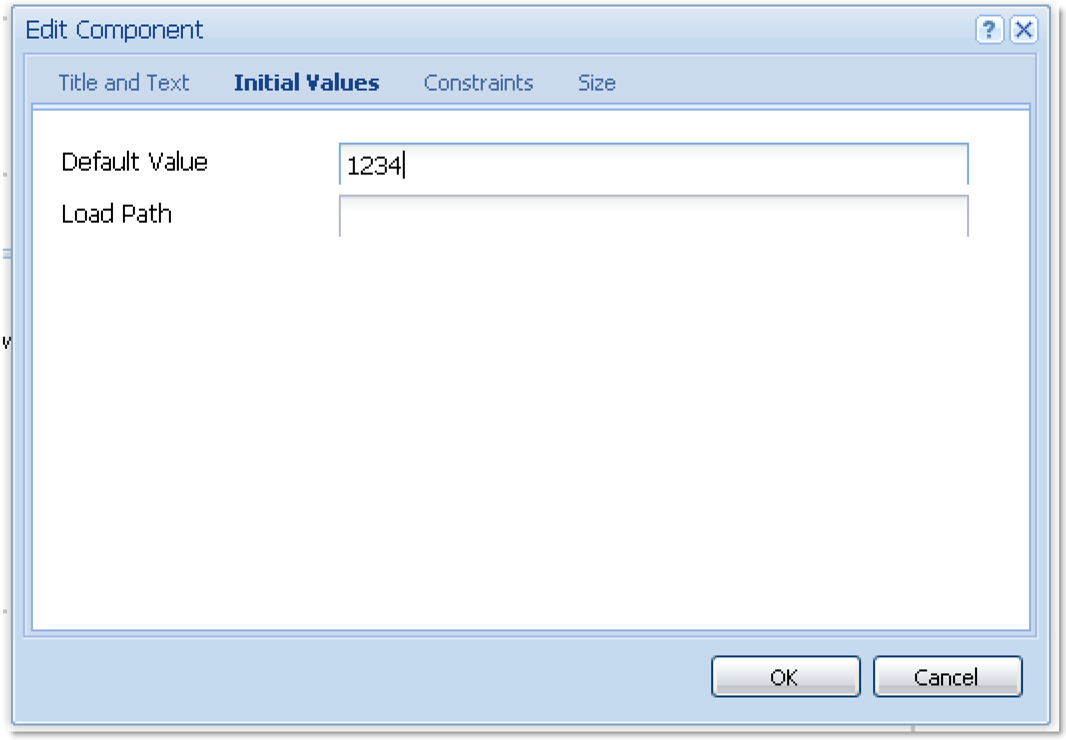
Description
: Provide additional information, if necessary. This description does not display in the form. Use it as help text for the user.

Items
: In check box and radio groups, you add each item here.

Multi Selectable check box
: Select this check box if you want users to be able to select multiple items.

Items Load Path
: If you want CQ WCM to automatically load the items, such as radio button text, from another location, indicate that location here.

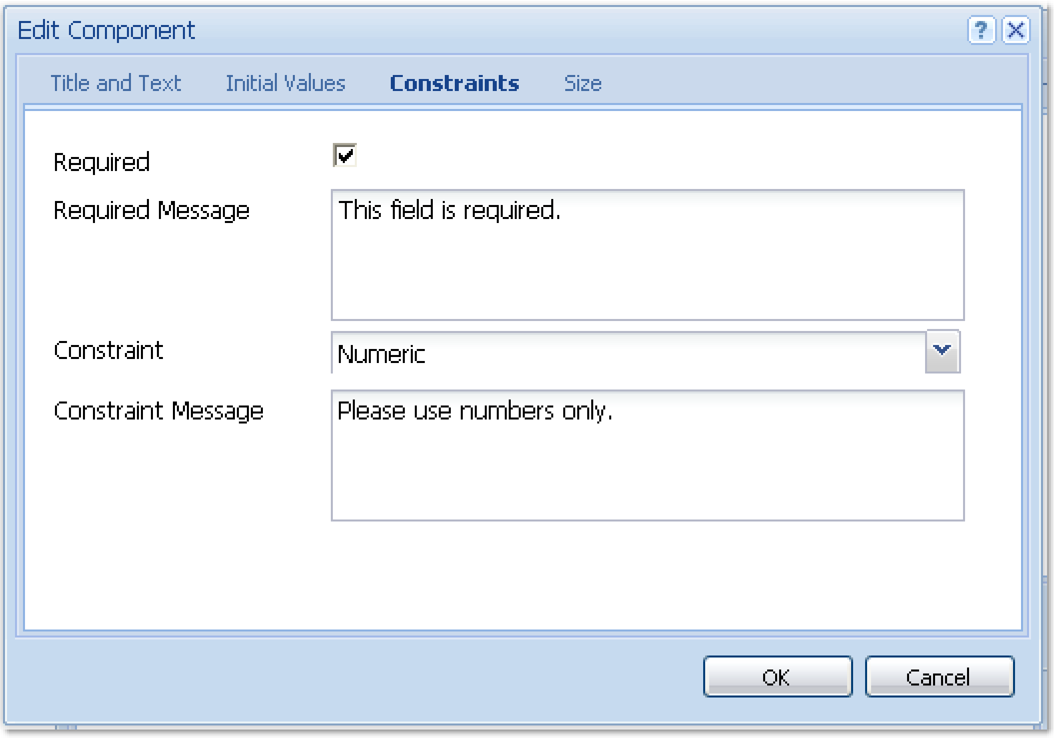
4.2.3.1.2 Initial Values



Default Value
The text displayed by default in this field.

Load Path
A path in the repository pointing to a property with the default value for the field.

4.2.3.1.3 Constraints



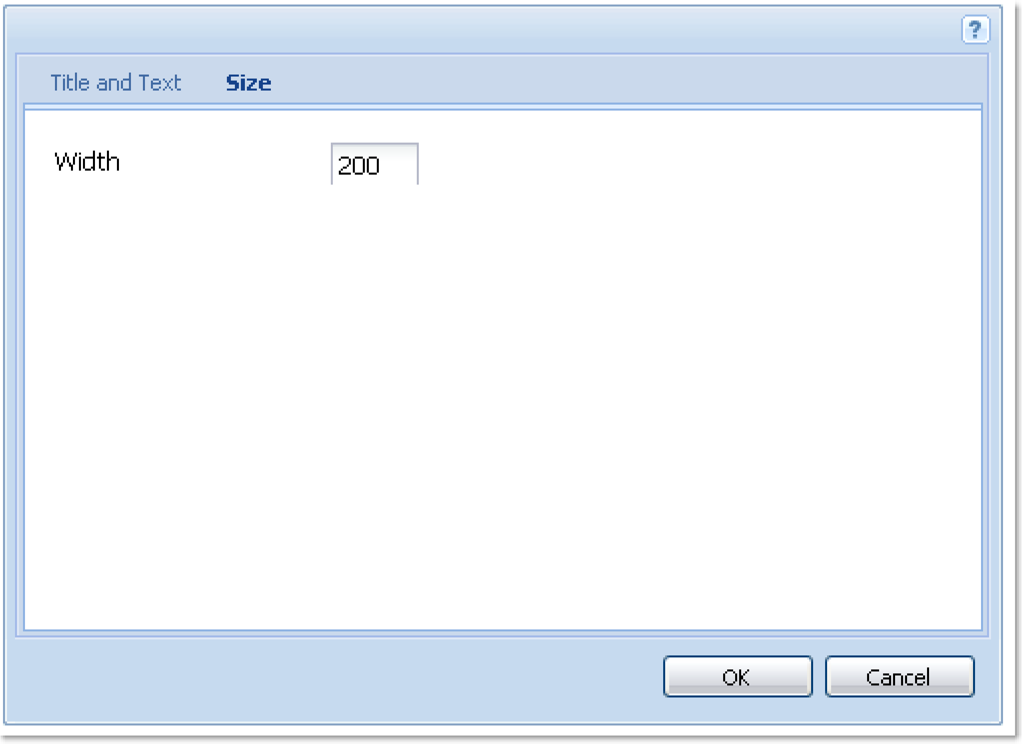
Required
    Select this check box if the element is required. Users must enter information into this element to save the form. Required fields are preceded by an asterisk *.

Required Message
    Message that displays in the element letting users know the element is required.

Constraint
    Select from the type of constraint you want to put on the field, for example, numeric. If users enter text that is not numeric, they see the Constraint Message.

Constraint Message
    Message that appears if the field does not meet the constraint requirements.

4.2.3.1.4 Size



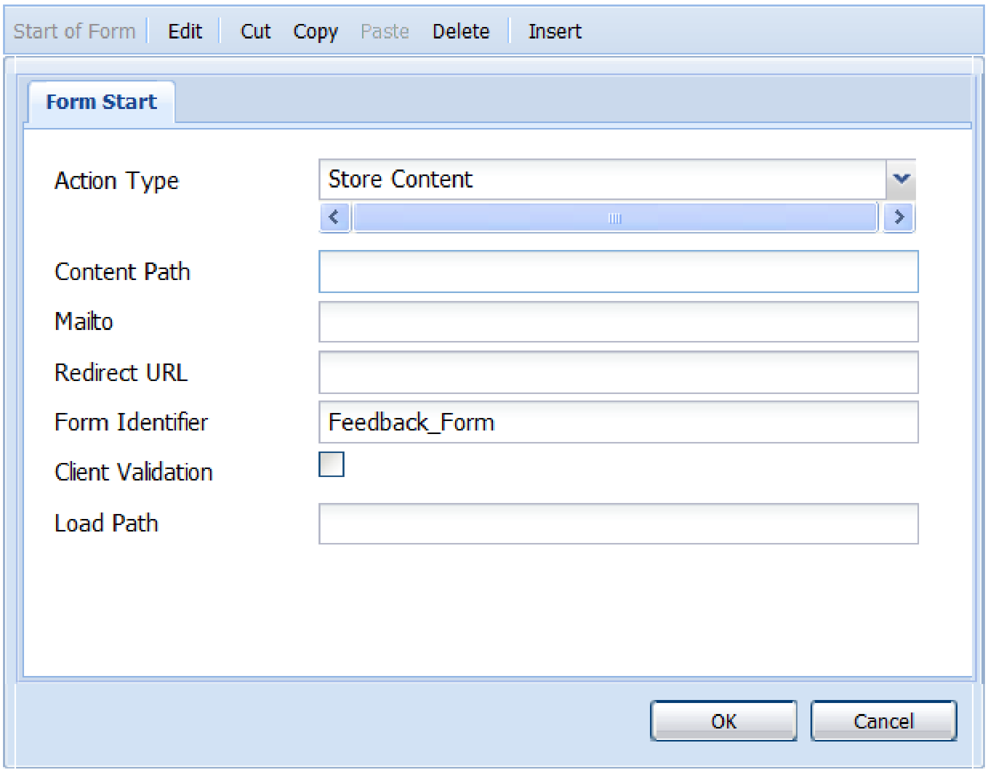
Width
    Enter the width in pixels that the field must be.

4.2.3.2 Form Address Field

This allows you to input an international address field with the following format:

4.2.3.3 Form Begin

The form begin defines the start of a new form on a page.



Action Type

Determines which form action is triggered (similar to "action=" in HTML) Action types include the following:

- Mail: Sends the form contents to an email address that you specify.
- Store Content: Stores the contents of the form into the repository at the given path. Therefore the content path field should contain a path in the repository. The path should end with "/" which means that for each form post a new node is created at the given location (example: `/forms/feedback/`)
- Newsletter: Use if the form is used for newsletter registration.

  These action types can be extended with other custom actions.

Content Path

The content path for any content that the form dumps. Enter a path that ends with a slash /. The slash means that for each form post, a new node is created at the given location (for example, /forms/feedback/).

Mailto

For email action types, enter the email of the person to send the form to.

Redirect URL

The redirect path points to a page that is invoked when a form is successfully submitted.

Form Identifier

Use the form identifier if several forms are used on a single page. The form identifier can uniquely identify the form.

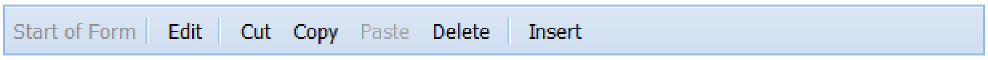
Client Validation

Indicates whether client validation is required for this form. This can be achieved in conjunction with the **`Forms Captcha`** component.

Load Path

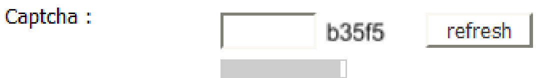
The load path for any content that the form requires.

The following example shows the Form Start element in Geometrixx:

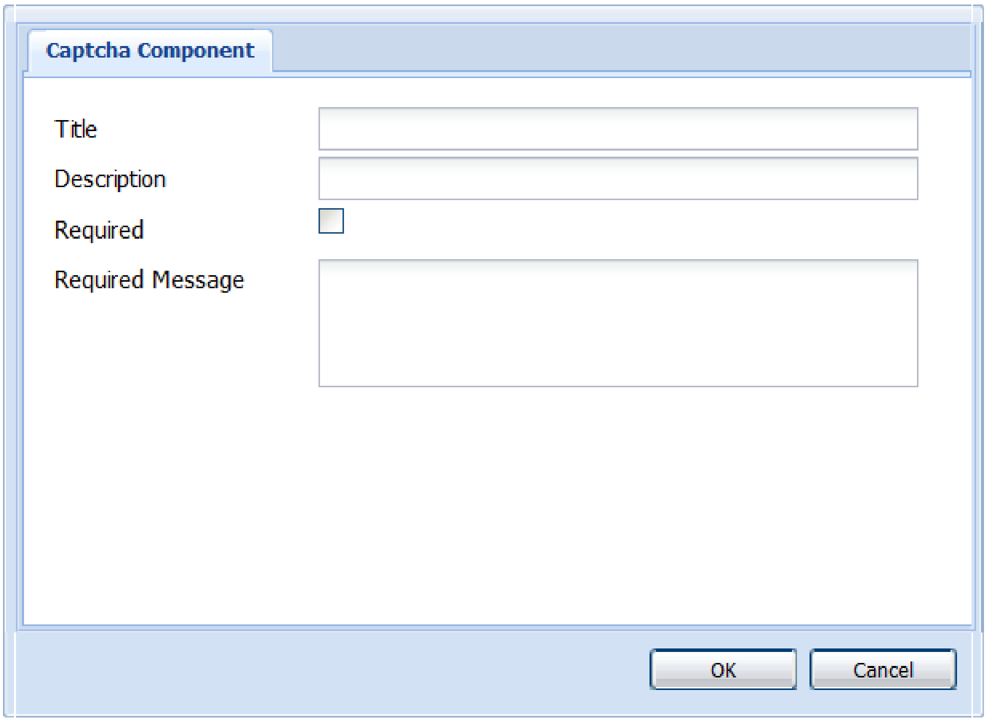


4.2.3.4 Form Captcha

The Captcha component requires the user to type in an alphanumeric string displayed on screen. The string changes with each refresh.



You can configure various parameters for this component:



Title

A title for the component.

Description

A description.

Required

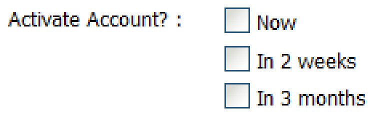
Indicates whether user input is required.

Required Message

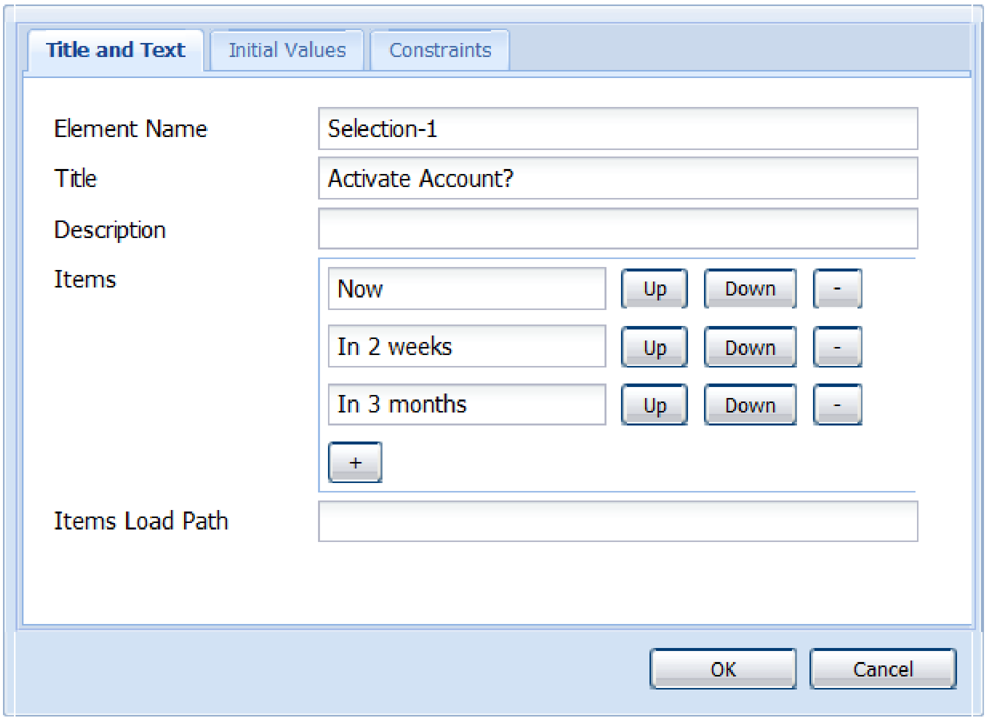
The message used to indicate to the user that input is required.

4.2.3.5 Form Checkbox Group

A checkbox provides you with a list of one of more checkboxes, several of which may be selected at the same time.

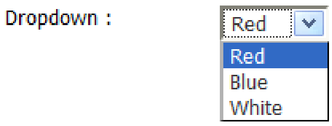


You can specify a title, description and element name. Using the **+** and **-** buttons you can add or remove items, then position them with the **Up** and **Down** buttons.

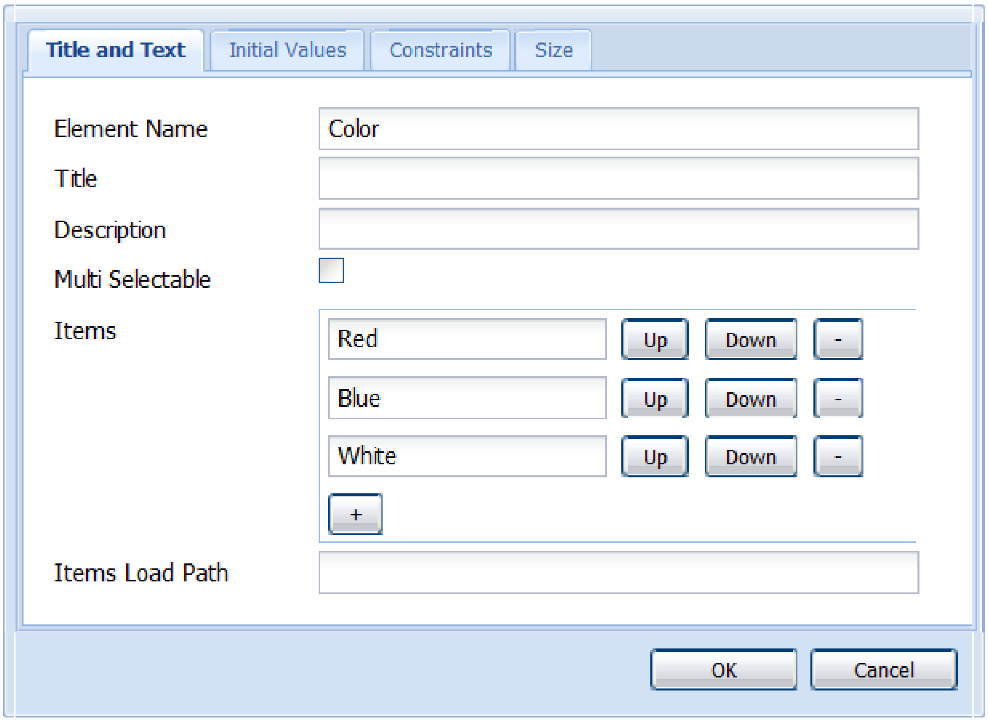


4.2.3.6 Form Dropdown List

A drop down list can be configured with your range of values for selection:

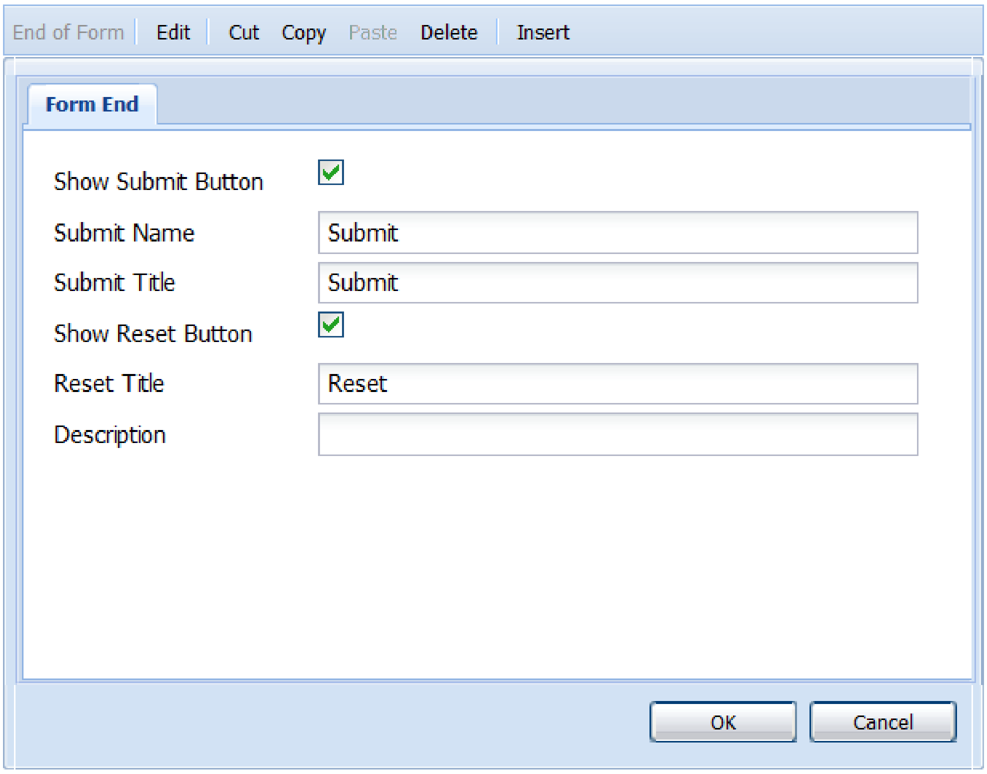


You can specify a title, description and element name. Using the **+** and **-** buttons you can add or remove items, then position them with the **Up** and **Down** buttons. You can also allow the users to select several items from the list.



4.2.3.7 Form End

The Form End marks the end of the form and creates a **`Submit`** button. You can specify an additional Submit button identifier (which you need if you have several **`Submit`** buttons on the form), the title of the submit button, and an optional **`Reset`** button, including its title.



Show Submit Button
: Indicates whether a Submit button should be shown or not.

Submit Name
An identifier if you are using multiple submit buttons in a form.

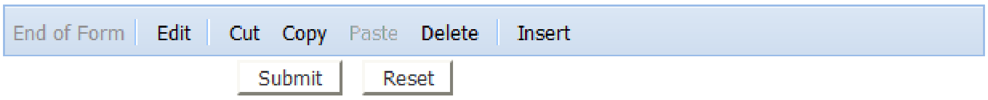
Submit Title
The name that appears on the button, such as **`Submit`** or **`Send`**.

Show Reset Button
Select check box to make the **`Reset`** button visible.

Reset Title
The name that appears on the **`Reset`** button.

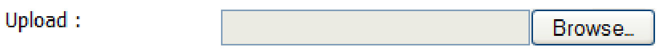
Description
Information that appears below the button.

The following example shows a Form End in Geometrixx:



4.2.3.8 Form File Upload

The file upload component provides the user with a mechanism for selecting and uploading a file.

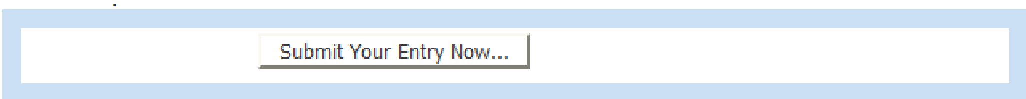


4.2.3.9 Form Hidden Field

This component allows you to create a hidden field, which may be used for various purposes.

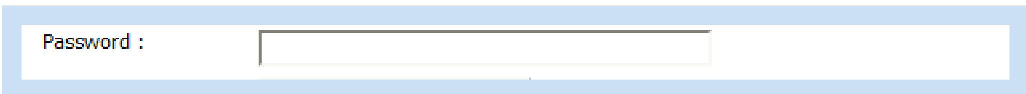
4.2.3.10 Form Image Button

An image button allows you to create a button with your own text and/or image:



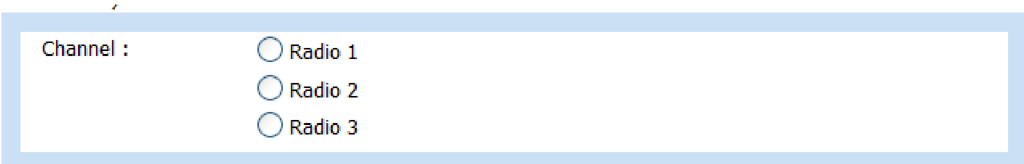
4.2.3.11 Form Password Field

This can be used when the user must input their password:

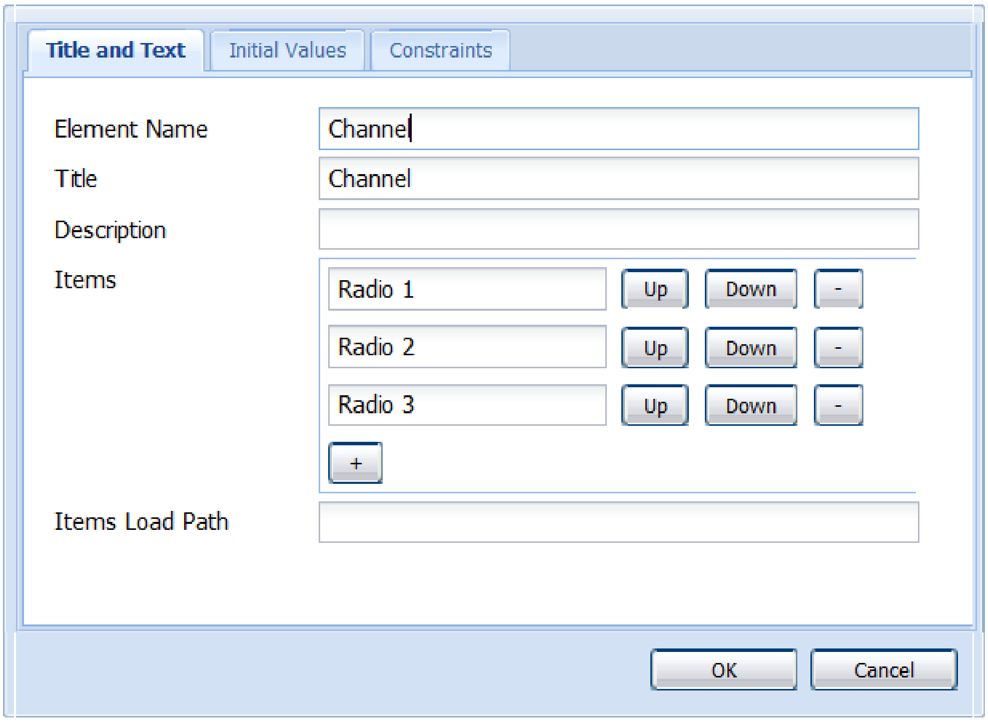


4.2.3.12 Form Radio Group

A radio group provides you with a list of one of more radio checkboxes, only one of which may be selected at any particular time.

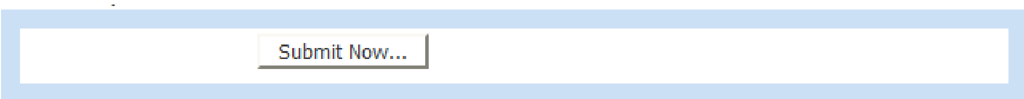


You can specify a title, description and element name. Using the **+** and **-** buttons you can add or remove items, then position them with the **Up** and **Down** buttons.



4.2.3.13 Form Submit Button

This component allows you to create a submit button, with your own text:



4.2.3.14 Form Text Field

Here you can configure a text field, of one or more lines, with your own lead in message:

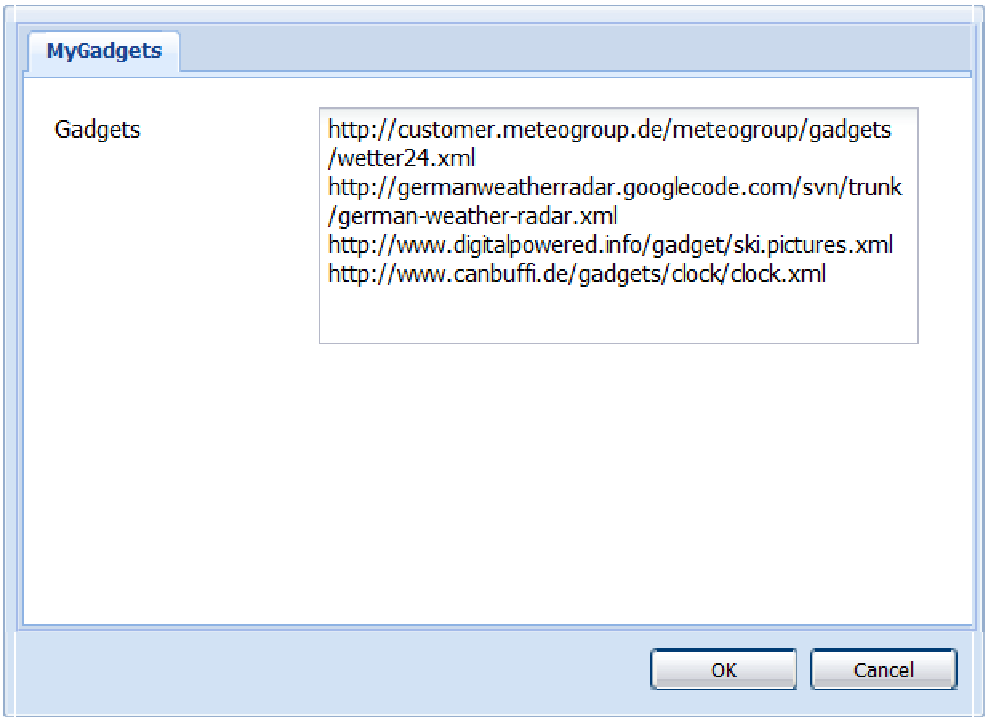
4.2.4 Other

Other components include the following:

- Gadgets: Lets you connect into gadgets available on many web sites.
- Search: Lets you create a Search component.
- Tag Clouds: Shows a graphical representation of tags within your web site.

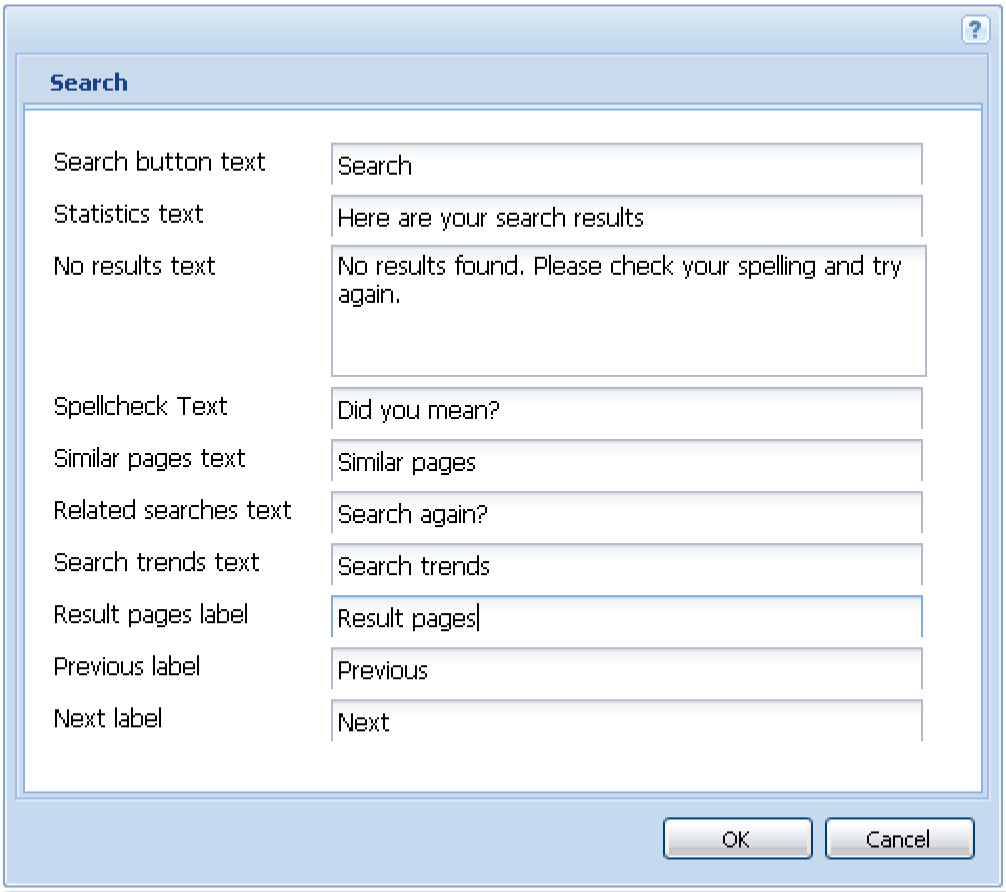
4.2.4.1 My Gadgets

This components lets you connect into various gadgets available:



4.2.4.2 Search

The Search component adds search capability to your page.



Search Button Text
: The name that displays on the actual search button.

Statistics Text
: The text that displays above the search results.

No Results
: If there are no results, the text entered here displays.

Spellcheck Text
: If someone enters a similar term, this text displays before the term.

  For example, if you type `geometrixxe`, the system displays `Did you mean? geometrixx`

Similar Pages Text
: The text that displays next to a result for similar pages. Click this link to see pages that have similar content.

Related Searches Text
: The text that appears next to related searches.

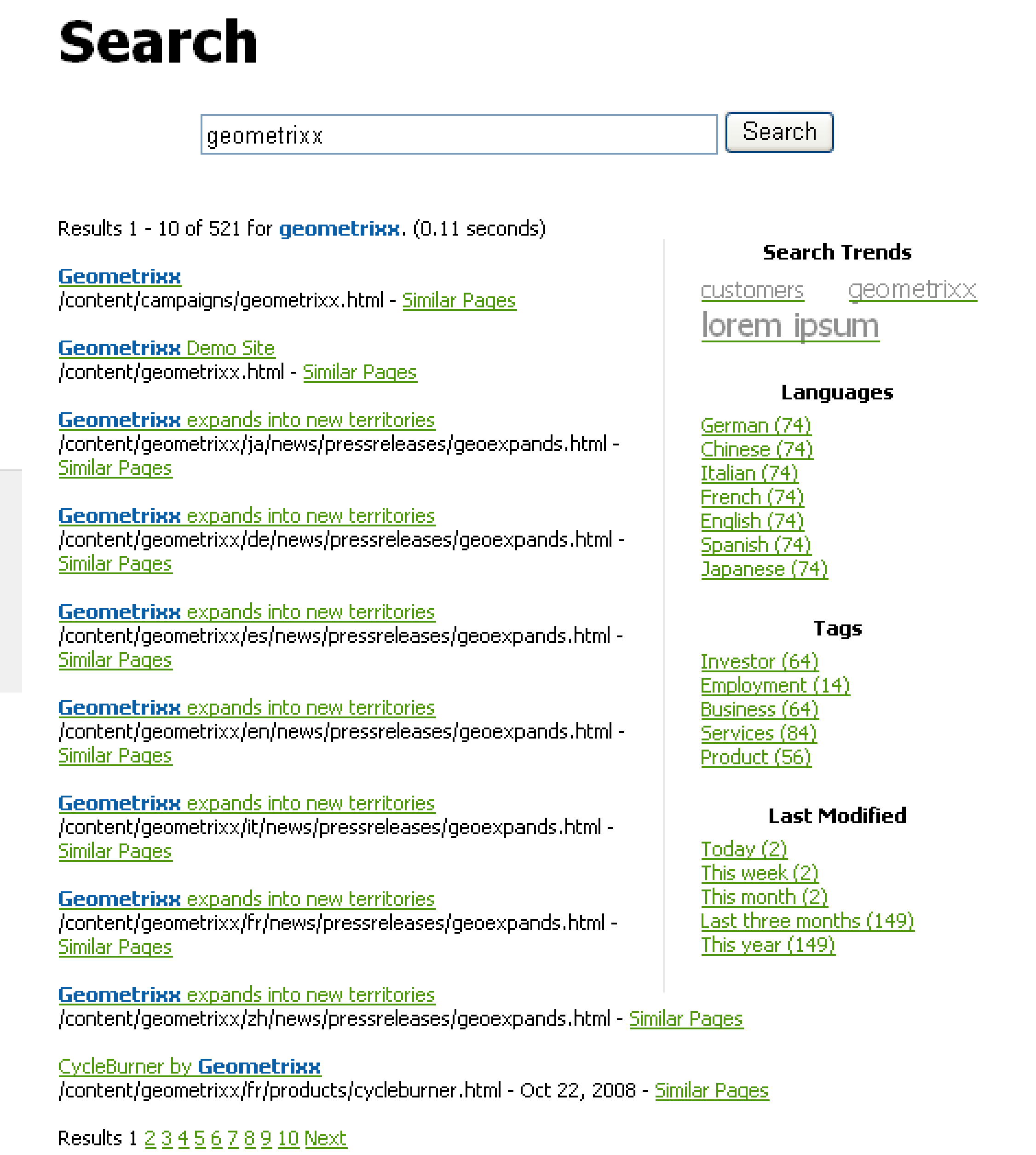
Search Trends Text
: The title above the search terms users enter.

Result Pages Label
: The text that appears at the bottom of this list with link to other results pages.

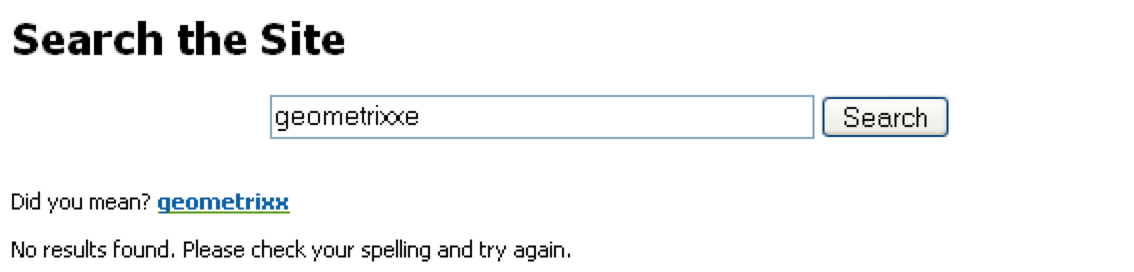
Previous Label
: The name that appears on the link to previous search pages.

Next Label
: The name that appears on the link to subsequent search pages.

The following example shows the Search component in Geometrixx after a search for the word *geometrixx*:



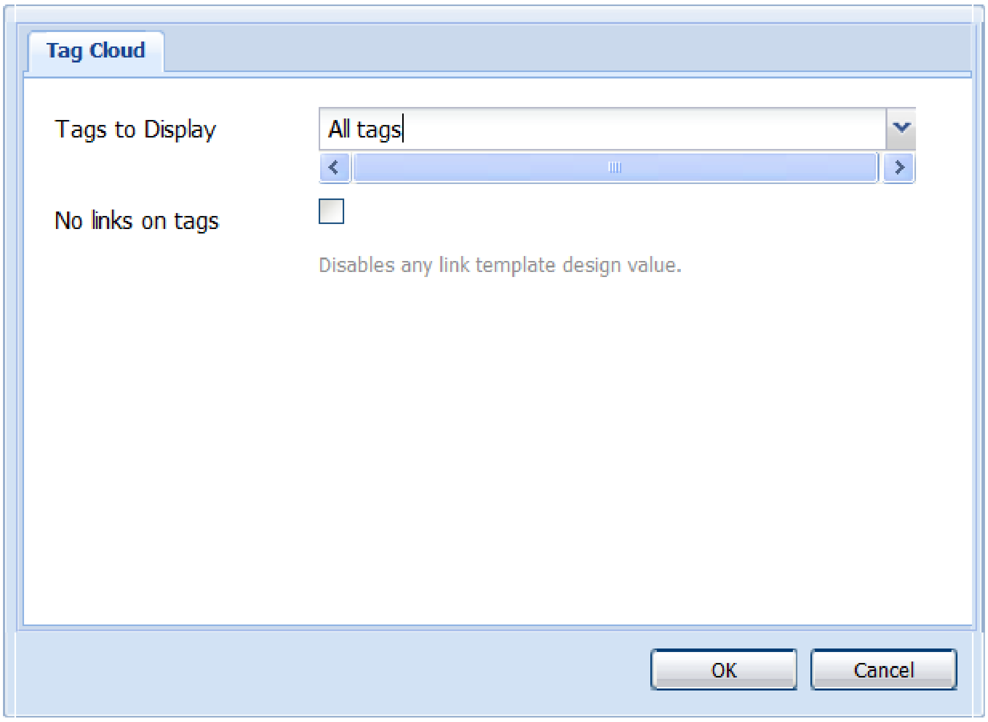
The following examples shows a search term that is misspelled and not available on the Geometrixx site:



4.2.4.3 Tag Cloud

A tag cloud shows a graphically presented selection of the tags within your website:

When configuring this, you can specify the tags you want to display and whether they should have links:



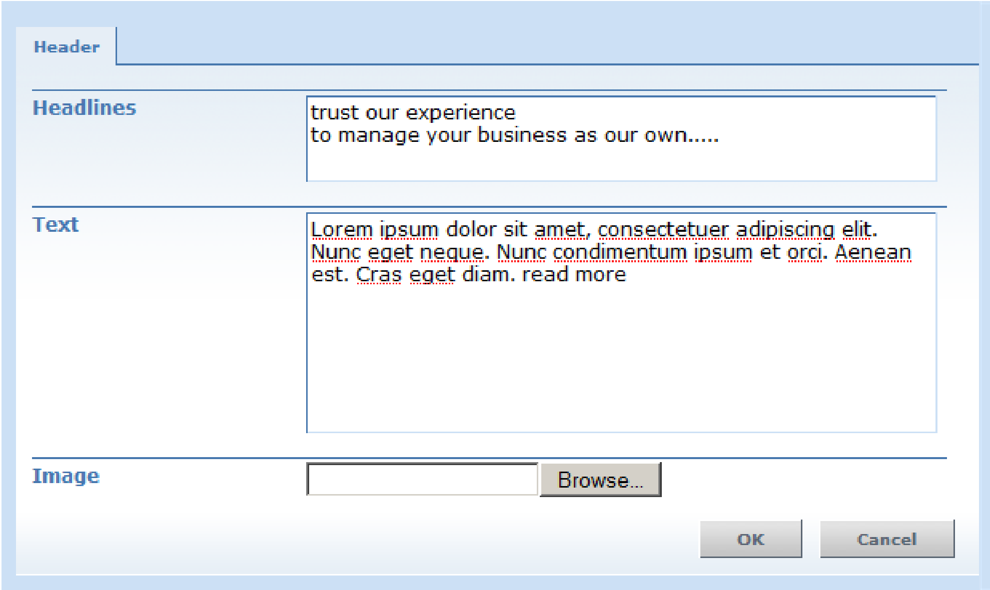
4.3 Additional Components

In addition to the standard components that are part of CQ WCM, you can add additional components via CRX. These components are described in this section.

Components accessible in CRX must first be added to the paragraph system to be used by authors. See How to Develop Components.

4.3.1 Header

The Header displays a graphical header banner at the top of the page, together with overlaying text. Usually a header is used on a home page.



Headlines

Lines of text displayed at the top of the header.

Differing fonts and sizes are used for each new line of text.

Text

A section of text displayed under the headlines using a much smaller font.

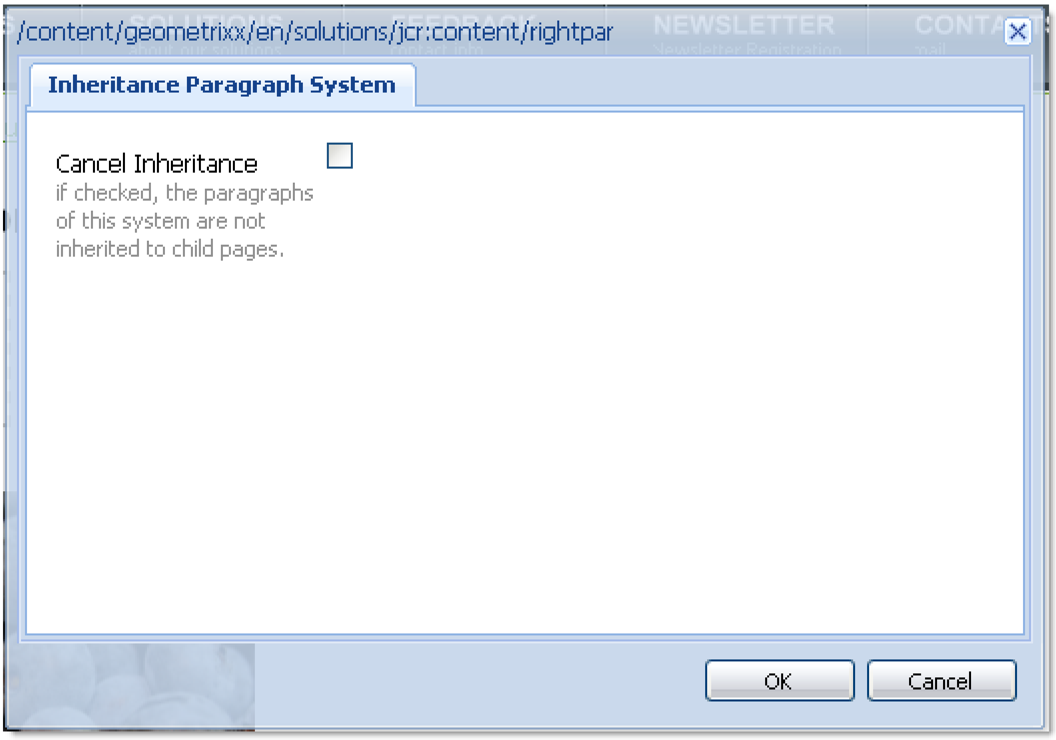
Image

The image to be shown. The location can be either typed directly, or accessed with Browse.

The following example shows the Header component in Geometrixx:

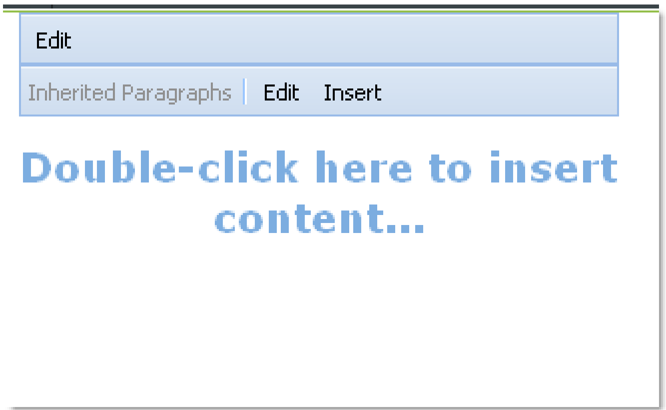
4.3.2 Inheritance Paragraph System (iparsys)

The inherited paragraph system is a paragraph system that also allows you to inherit the created paragraphs from the parent. You add paragraphs to iparsys at for example, `/content/geometrixx/en/products` and as result, all the subpages of `products` that also have iparsys with the same name inherit the created paragraphs from the parent. On each level, you can add more paragraphs, which are then inherited by the children pages. You can also cancel paragraph inheritance at a level at any time.



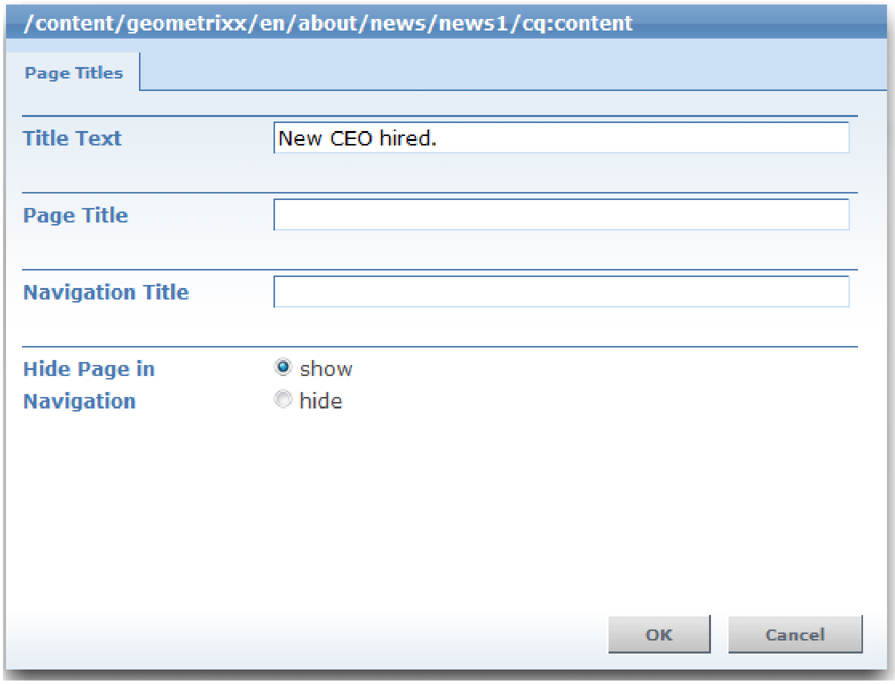
Cancel Inheritance
If selected, child pages do not inherit the paragraphs of this page.

The following example shows the iparsys component in Geometrixx:



4.3.3 Listchildren

The Listchildren component displays a formatted list of all pages located under the current page.



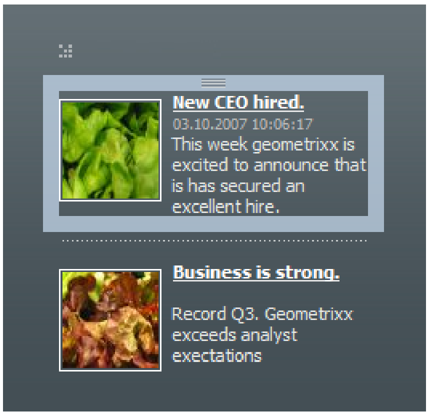
Title Text
: Title of the list.

Page Title

Navigation Title
: Title that appears in the navigation menu for this page.

Hide Page in Navigation
: Indicates whether the page is shown in the navigation menu.

The following example shows the Listchildren component in Geometrixx:



4.3.4 parbase

The parbase allows components to inherit attributes from other components, similar to subclasses in object oriented languages such as Java, C++, and so on. For example, when you open the `/libs/foundation/components/text` node in the CRX Explorer, you see that it has a property named `sling:resourceSuperType`, which references the parbase component. The parbase here defines tree scripts to render images, titles, and so on, so that all components subclassed from this parbase can use this script.

Users do not need access to the parbase.

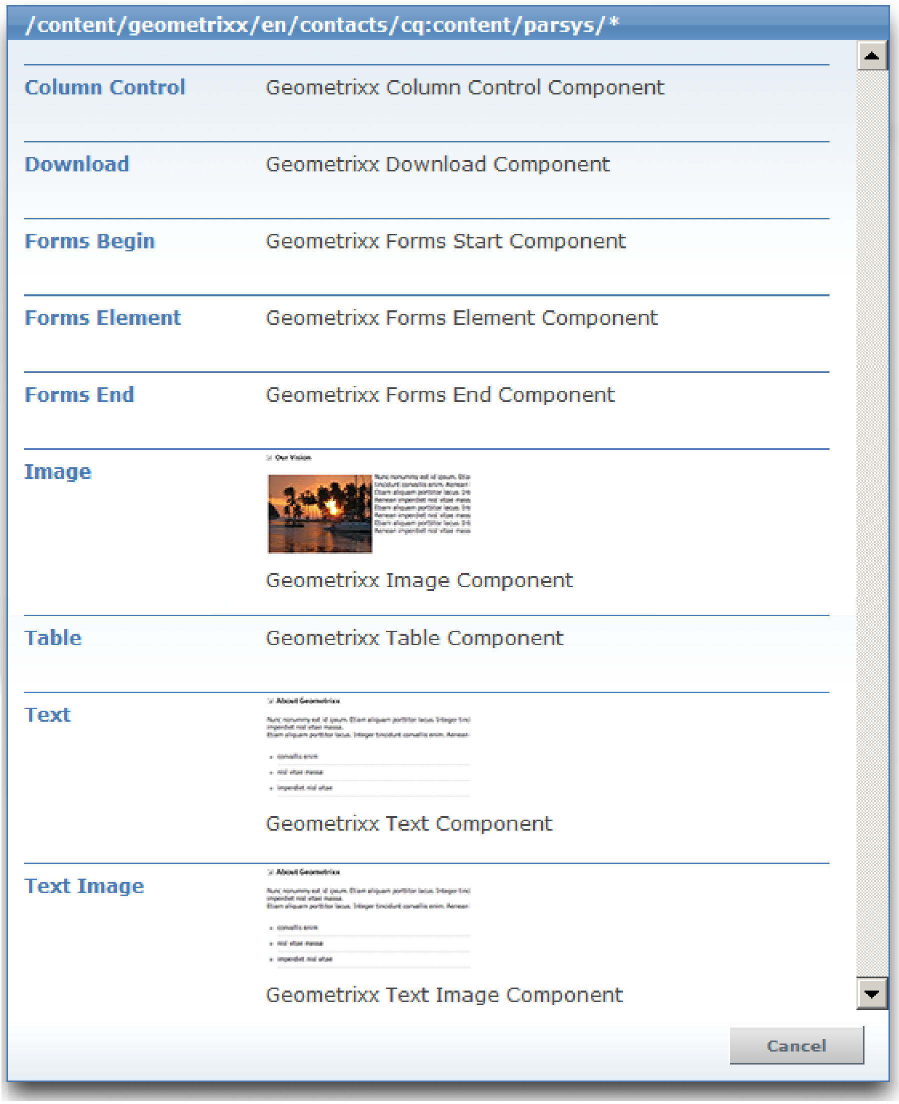
4.3.5 parasys (Paragraph System)

The paragraph system (parsys) is a compound component that allows authors to add components of different types to a page and contains all other paragraph components. Each paragraph type is represented as a component. The paragraph system itself is also a component, which contains the other paragraph components.

You configure which components users see by making them available to the user in Design mode.

For example, the content of a product page may contain the following:

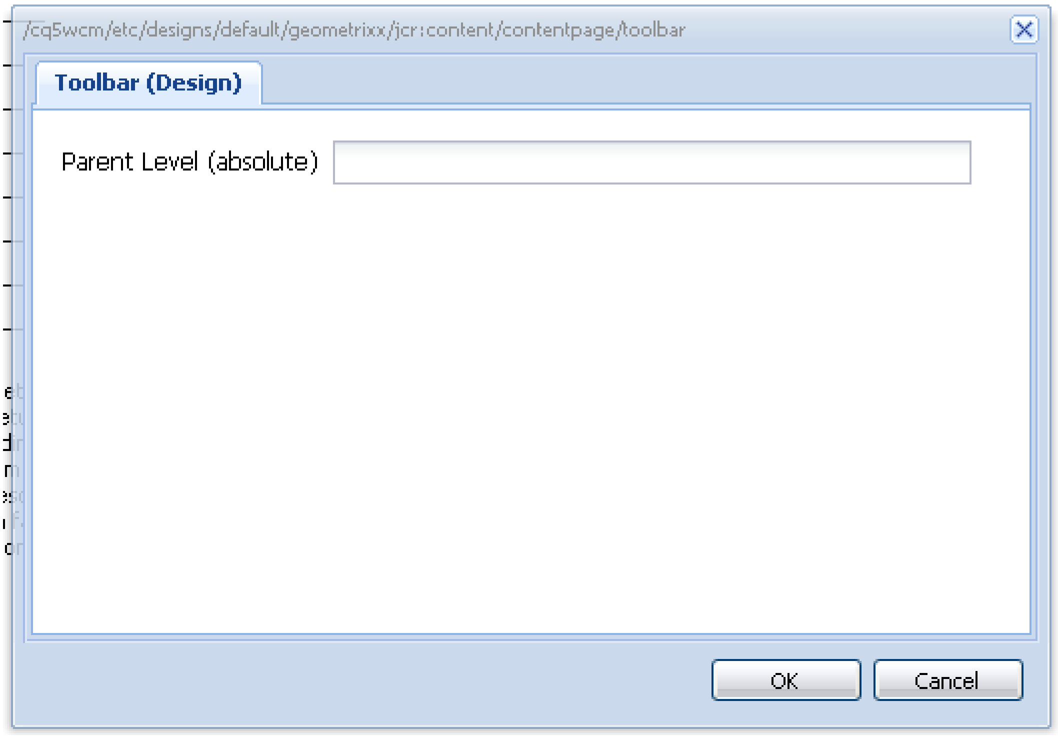
- An image of the product (in the form of an image or textimage paragraph)
- The product description (as a text paragraph)
- A table with technical data (as a table paragraph)
- A form users fill out (as a forms begin, forms element, and forms end paragraph)



List of components available for use...
See individual components.

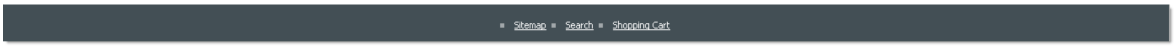
4.3.6 Toolbar

The toolbar appears at the bottom of the page and is a navigational tool.



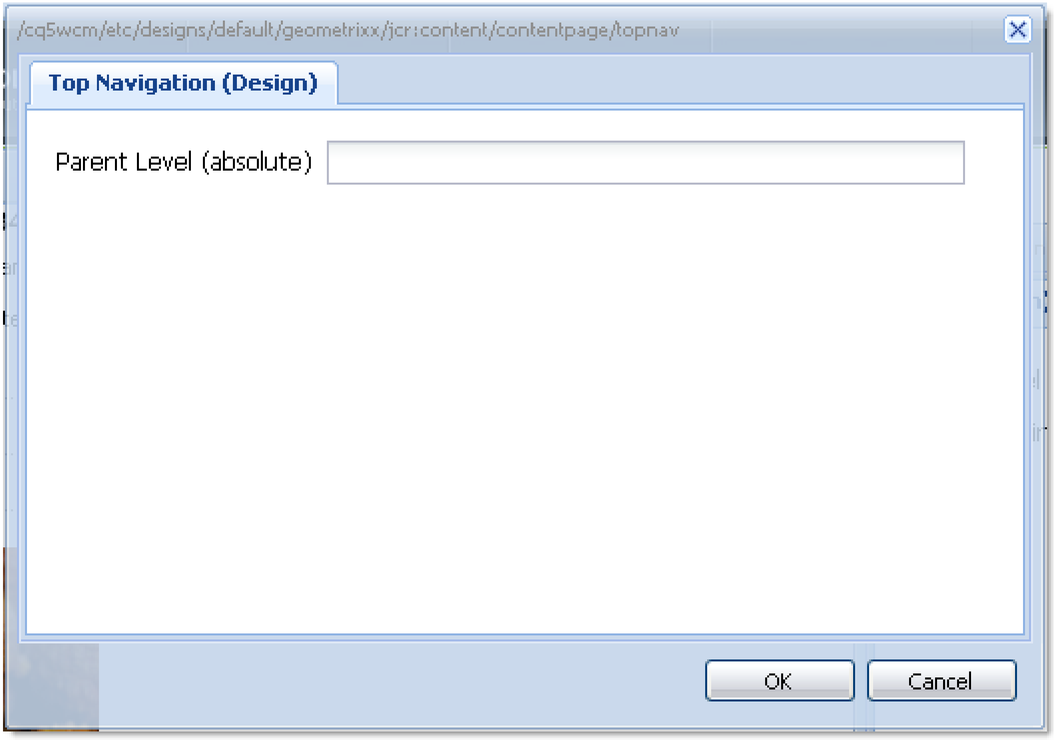
Parent Level (absolute)
    Determines from what level the toolbar lists links to children pages. Looks for a child node named `/toolbar`.

The following example shows the toolbar in Geometrixx:



4.3.7 Topnav (Top navigation bar)

The top navigation bar appears at the top of the page and helps users navigate to the different content sections.



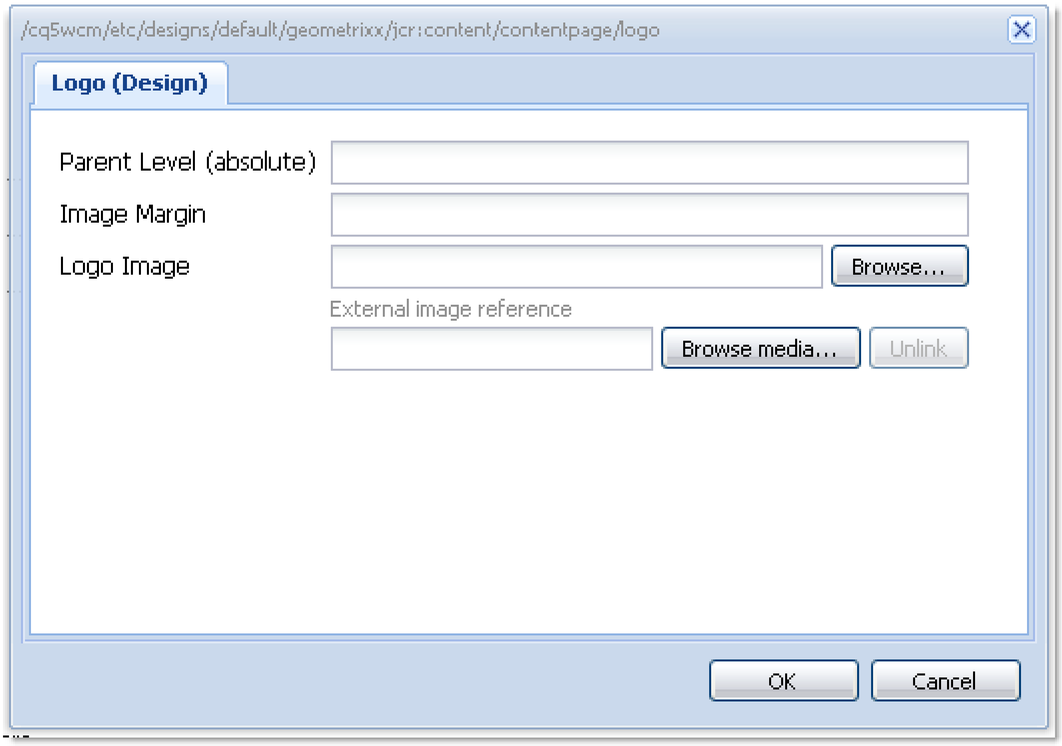
Parent Level (absolute)

Determines from what level the children get listed in the top navigation bar. In Geometrixx, if you enter 1, topnav renders a link to `/content/geometrixx/en` in the top navigation bar, the only child page of `/content/geometrixx`. If you enter 2, CQ displays all children of `/content/geometrix/en` (this is the default).

The following example shows the top navigation bar in Geometrixx:

4.3.8 Logo

The logo is a clickable image that points to another part of the site.



Parent Level (absolute)
: Determines where the logo image points to; that is, when users click the logo, they go to the level indicated. In Geometrixx, if you enter 1, the logo link points to `/content/geometrixx` and if you enter 2, the logo link points to `/content/geometrixx/en` and so on.

Image Margin
: Sets the margin between the image and the remaining space.

Logo Image
: Browse to the logo image either by clicking **`Browse`** to import a logo directly into CQ5 or click **`Browse media`** to select and image from the media library.

5 Default Templates

In CQ WCM, a template specifies a type of page.

It defines the structure of a page; including a thumbnail image, and other properties. For example, you may have a separate templates for product pages, sitemaps, and contact information. Templates are comprised of components.

5.1 Overview of templates

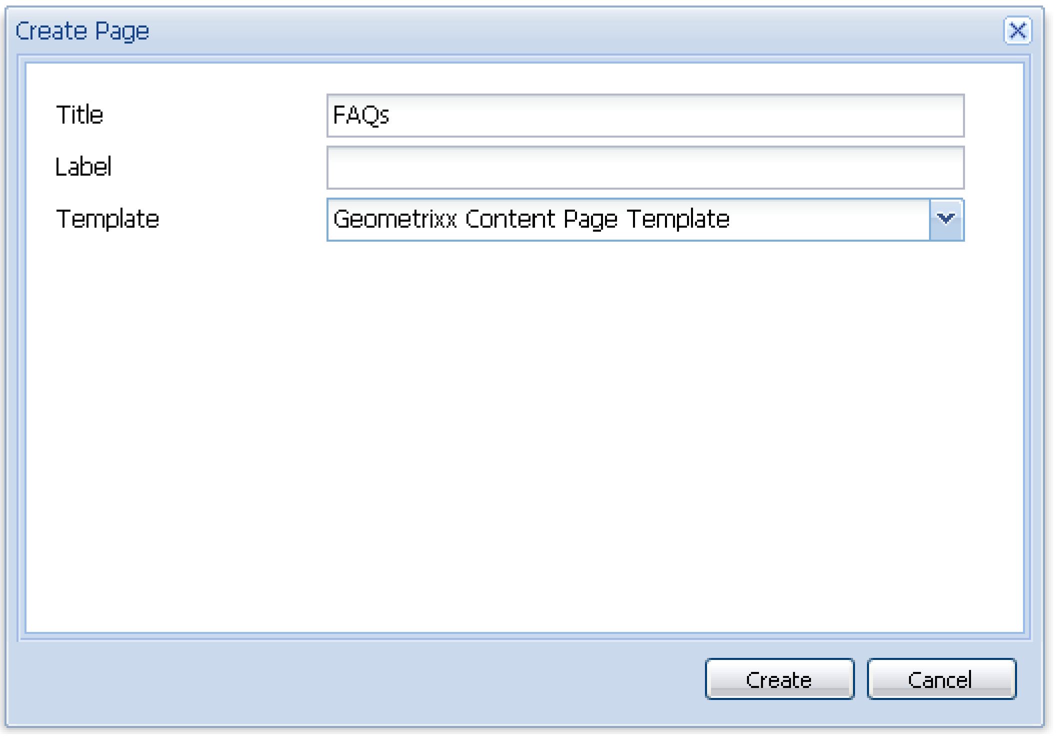
CQ WCM comes with several templates including a contentpage, redirect page, and home page.

Table 5.1. Templates within CQ5 (/apps/geometrixx/components and /libs/foundation/components)

Title	Component	Location	Purpose	Equivalent in CQ4
Home Page	homepage	G	The Geometrixx home page template.	
Content Page	contentpage	G	The Geometrixx content page template.	
Redirect	redirect	libs	Redirect. Component and Template.	

5.2 Content Page

The content page component creates a new page for content according to a template selected by the author.

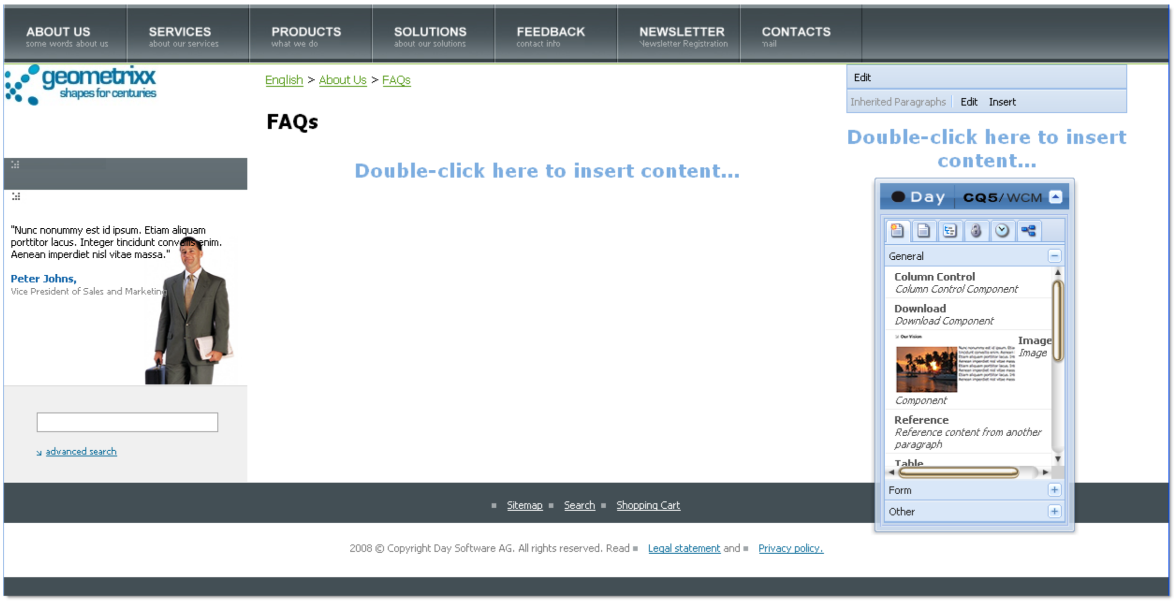


Title
: The title displayed on the resulting web-page.

Label
: The label used when naming the page.

Template
A list of templates available for use when generating the new page.

The following example illustrates the contentpage component:



5.3 Redirect

Use the Redirect component when you want to redirect users to another page. Redirect is useful for an obsolete page or for structuring the site..

6 User Administration and Security

This chapter describes how to configure and maintain user authorization and also describes the theory behind how authentication and authorization work in CQ WCM.

6.1 A quick overview of Authentication and Authorization

6.1.1 Authentication

Authentication is the process of identifying, and verifying, a user.

The process of authentication and login can be broken down as follows:

1. Authentication information is extracted from the request. In CQ this is done by an *authentication handler*.
2. The authentication information is then checked to determine whether it is sufficient and/or correct. In CQ this is performed by the *login modules*.
3. The appropriate response is initiated.

For CQ, initial authentication uses a standard HTML-login form in conjunction with the *Authorization Header Authentication Handler*. The HTML-form must have fields for the user name and password (the same field names must then be used by the Authorization Header Authentication Handler).

You can also use a similar form for controlled access to various areas of your website.

6.1.1.1 LDAP, Single Sign On and Portals

The various authentication methods can be realized by using different login modules.

For example, CQ can interact with a LDAP server that stores user information centrally, eliminating the need for duplication. This central server is then used to verify login information which enables you to realize Single Sign On, both with other in-house applications and external Portals. See CRX - LDAP Authentication for further information.

6.1.2 Authorization

Authorization determines whether a user is allowed to take action on specific areas within the system. For example, a user can be authorized to read or update a specific page.

Authorization is managed using a series of entities:

User
: A user accesses a system using their user account. A user models either a human user or an external system connected to the system. The user account holds the details needed for accessing CQ; a key purpose of an account is to provide the information for the authentication and login processes - allowing a user to log in.

Groups
: A group is a collection of users and/or other groups. A change in the permissions/privileges assigned to a group is automatically applied to all users in that group. A user does not have to belong to any group, but often belongs to several.

Action
: Actions are performed on a resource. For example, a user can read, edit or delete a page, amongst other actions.

Permissions
: A permission allows a user to perform an action on a given resource within the repository. Permissions are stored, and can be seen, at resource level within the repository.

Privileges
Privileges allow access to functionality available within the application; for example, replication of a specific path, or the ability to update the page hierarchy (including creating new pages).

Resources
Resources define the functionality to be accessed.

6.2 Authorization for CQ WCM - The Concepts

This section deals with the various entities and related concepts in more detail to help you configure an easy to maintain user management concept.

6.2.1 Users

Users will log in to CQ with their account. Each user account is unique and holds the basic account details, together with the privileges assigned.

Users are often members of Groups, which simplify the allocation of these permissions and/or privileges.

6.2.2 Groups

Groups are collections of users and/or other groups; these are all called **`Members`** of a group.

Their primary purpose is to simplify the maintenance process by reducing the number of entities to be updated, as a change made to a group is applied to all members of the group. Groups often reflect:

- a role within the application; such as someone who is allowed to “surf” the content, or someone who is allowed to “contribute” content.
- your own organization; you may want to extend the roles to differentiate between contributors from different departments when they are restricted to different branches in the content tree.

Therefore groups tend to remain stable, whereas users come and go more frequently.

With planning and a clean structure, the use of groups can reflect your structure, giving you a clear overview and an efficient mechanism for updates.

6.2.3 Default Users and Groups

CQ WCM installs a number of users and groups. These can be seen when you first access the Security Console after installation.

The following tables list each item with a short description and Day's recommendation about any changes necessary. If you do not delete the accounts listed here, **please change the default password**.

Table 6.1. Default Users and Groups

User ID	Type	Description	Recommendation
`admin` **Default password:** `admin`	User	System administration account and member of the administrator group, with full access rights. This account is used for the connection between CQ WCM and CRX.	**Day strongly recommends that the password for this user account be changed from the default.** Preferably upon installation, though it can be done afterwards. Other attributes cannot be configured as this account is integral to CQ5.

User ID	Type	Description	Recommendation
		As such its configuration cannot be edited - with the exception of the password.	**Note:** This account is not to be confused with the admin account of the Communiqué Servlet Engine.
`anonymous` **Default password:** *none*	User	Holds the default rights for unauthenticated access to an instance. Per default this holds the minimum access rights. For a publish instance, anonymous is a member of the **surfers** group, whereas for an author instance it is a member of the **uploaders** group.	**Do not delete this account.** Modifying this account has additional security implications. If you have to edit this account, make a backup copy first.
`author` **Default password:** `author`	User	A author account allowed to write to `/content`. Encompasses contributor and surfer privileges. Can be used as a webmaster as it has access to the entire `/content` tree.	
`administrators`	Group	Group that gives administrator rights to all its members. Only admin is allowed to edit this group. Has full access rights.	
`contributor`	Group	Basic privileges which allow the user to write content (as in functionality only). Does not allocate any privileges to the /content tree - these must be specifically allocated for the individual groups or users.	
`everyone`	Group	Every user in CQ WCM is a member of the group **`everyone`**, even though you may not see the group or the membership relation in all tools. This group can be thought of as the “default rights” as it can be used to apply permissions for everyone, even users that will be created in the future.	**Do not modify or delete this group.** Modifying this account has additional security implications.
`privilege-administrators`	Group	Allows a user to edit the privileges on the account of a different user.	
`surfer`	Group	Group that allows the members to read content.	
`tag-administrators`	Group	Group that is allowed to edit tags.	
`uploader`	Group	Privileges needed to allow the smart uploading widget to write to `/tmp`.	

User ID	Type	Description	Recommendation
`user-administrators`	Group	Authorizes user administration; for example the right to read home-directories.	
`workflow-editors`	Group	Group that is allowed to create and modify workflow models.	
`workflow-users`	Group	A user participating in a workflow must be member of group workflow-users. This gives him or her full access to: `/etc/workflow/instances` so that he or she can update the workflow instance. The group is included in the standard installation, but you must manually add your users to the group.	

6.2.4 Permissions

Permissions define who is allowed to perform which actions on a resource. The permissions are held as access control lists.

Permissions allow you to either **`Allow`** or **`Deny`** the actions.

6.2.4.1 Actions

Actions can be performed on a page (resource). For each page in the hierarchy you can specify which action the user is allowed to take on that page. See the section called “Permissions”.

The following actions are available:

Table 6.2. Actions

Action	Description
Read	The user is allowed to read the page and any child pages.
Modify	The user can modify existing content on the page, and on any child pages.
Create	The user can: • create new paragraphs on the page, or on any child page. • create a new page, or child page, if the Privilege **`Modify Hierarchy`** has also been granted.
Delete	The user can: • delete existing paragraphs from the page, or any child page. • delete a page, or child page, if the Privilege **`Modify Hierarchy`** has also been granted.
Read ACL	The user can read the access control list of the page, or child pages.
Write ACL	The user can modify the access control list of the page, or any child pages.

6.2.4.2 Access Control Lists and how they are evaluated

CQ WCM uses *Access Control Lists* (ACLs) to organize the permissions being applied to the various pages.

Access Control Lists are made up of the individual permissions and are used to determine the order in which these permissions are actually applied. The list is formed according to the hierarchy of the pages under consideration. This list is then scanned bottom-up until the first appropriate permission to apply to a page is found.

Table 6.3. Permission States

Action	Description
Allow	CQ WCM allows the user to perform the action on this page, or on any child pages.
Deny	CQ WCM does not allow the user to perform the action on this page, nor any child pages. See Section 6.2.4.2, "Access Control Lists and how they are evaluated" for further details of how these interact.
Inherit	The permissions will be inherited from a parent page at some point higher up the tree.

Important

If no permissions are defined for a page (neither direct nor inherited) then all actions are denied.

The following are recommendations about managing access control lists:

- Do not assign permissions directly to users. Assign them only to groups.

  This will simplify the maintenance, as the number of groups is much smaller than the number of users, and also less volatile.

- Use `Deny` sparingly. As far as possible use only `Allow`.

  Using deny can cause unexpected effects if the permissions are applied in a different order to that expected. If a user is a member of more than one group, the Deny statements from one group may cancel the Allow statement from another group, or vice versa. It is hard to keep an overview when this happens and can easily lead to unforeseen results, whereas Allow assignments do not cause such conflicts.

  Day recommends that you work with Allow rather than Deny see the section called "Best Practices".

Before modifying either permission, be sure you understand how they work and inter-relate. See the CRX documentation to illustrate how CQ WCM evaluates access rights and Examples on setting up access control lists.

Note

For Communiqué 4 users: Whereas Communiqué 4 ACLs were user-based, CQ5 ACLs are resource-based. Pre- and post-ACLs do not apply in CQ5.

6.2.5 Privileges

Privileges are similar to permissions, but are allocated to allow access to functionality within the application.

You can **Allow**/**Grant** or **Deny** them.

Within the standard installation of CQ WCM the privilege to modify the hierarchy can be allocated. This allows the user to create and/or delete pages - if the relevant action has been allocated the correct permission.

Depending on your installation, additional privileges may be available.

6.2.6 Replication Privilege

A special form of privilege, **Replication Privilege** is highlighted (with its own tab) in CQ WCM as replication is integral to the whole concept of CQ WCM.

For each page you can either **Allow** or **Deny** a user's right to replicate content to another environment. As with permissions the privilege is also applied to any child pages.

Note

Replication privileges can also be combined as access control lists, so as with permissions it is recommended to work with **Allow** rather than **Deny** see the section called “Best Practices”..

6.2.7 Impersonating another User

With the **Impersonate** functionality a user can work “on behalf of” another user.

This means that a user account can specify other accounts which can operate with their account. In other words, if user-B is allowed to impersonate user-A, then user-B can take actions using the full account details of user-A.

This allows the impersonator accounts to complete tasks as if they were using the account they are impersonating; for example, during an absence or to share an excessive load short-term.

Important

If an accounts impersonates another it is very difficult to see. An entry is made in the audit log when the impersonation starts and ends, but the other log files (such as the access log) hold no information about the fact that impersonation has occurred on the events. So if user-B is impersonating user-A all events will look as if they were performed by user-A personally.

6.2.8 Best Practices

The following describes best practices when working with permissions and privileges:

Table 6.4. Best Practices

Rule	Reason
Use Groups.	Don't assign access rights on a user-by-user basis. There are several reasons for this: 1. You have many more users than groups, so groups simplify the structure. 2. Groups help provide an overview over all accounts. 3. Inheritance is simpler with groups. 4. Users come and go. Groups are long-term.

Rule	Reason
Be Positive.	Always use **`Allow`** statements to specify the group's rights (wherever possible). Avoid using a Deny statement. Groups are evaluated in order, and the order may be defined differently per user. In other words: You may have little control over the order in which the statements are implemented and evaluated. If you use only **`Allow`** statements, the order does not matter.
Keep It Simple	Investing some time and thought when configuring a new installation will be well repaid. Applying a clear structure will simplify the ongoing maintenance and administration, ensuring that both your current colleagues and/or future successors can easily understand what is being implemented.
Test	Use a test installation to practice and ensure that you understand the relationships between the various users and groups.
Default Users/ Groups	Always update the Default Users and Groups immediately after installation to help prevent any security issues.

6.3 Configuring the Users and Groups

Users include people using the system and foreign systems making requests to the system.

A group is a set of users.

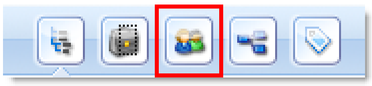
Both can be configured using the User Administration functionality within the Security Console.

6.3.1 Accessing User Administration with the Security Console

You access all users, groups, and associated permissions using the **`Security`** console. All the procedures described in this section are performed in this window.

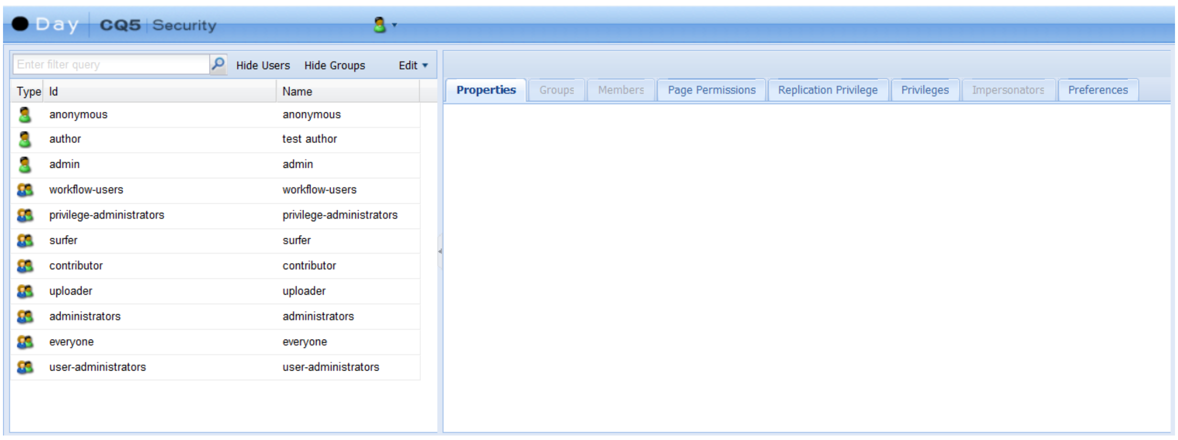
To access CQ WCM security, do one of the following:

- From the welcome screen, or various locations in CQ WCM, click the security icon.

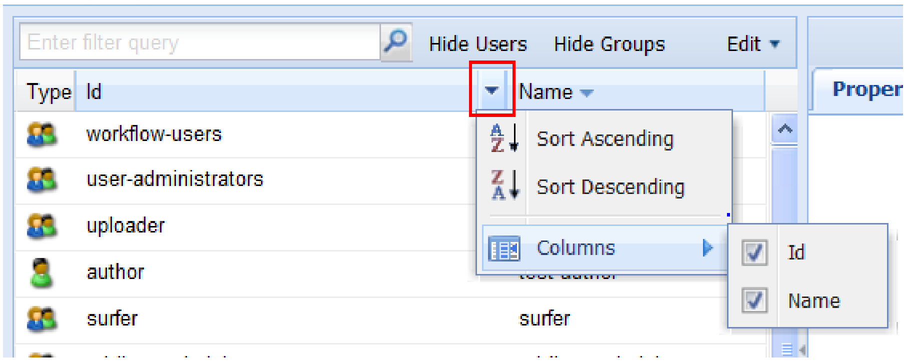


- Navigate directly to `http://localhost:<port>/libs/security/content/admin.html`. Be sure you log in to CQ WCM as an administrator.

The following window displays:



The left tree lists all the users and groups currently in the system, You can select the columns you want displayed, sort the contents of the columns and even change the order in which the columns are displayed by dragging the column-header to a new position.



The tabs provide access to various configurations:

Table 6.5. Security Console

Tab	Description
Filter box	A mechanism for filtering the users and/or groups listed. See the section called "Filtering Users and Groups".
Hide Users	A toggle switch which will hide all users listed, leaving only groups. See the section called "Hiding Users and Groups".
Hide Groups	A toggle switch which will hide all groups listed, leaving only users. See the section called "Hiding Users and Groups".
Edit	A menu allowing you to create and delete users or groups. See the section called "Creating Users and Groups" and the section called "Deleting Users and Groups".
Properties	Lists information about the user or group that can include email information, a description, and name information. Also allows you to change a user's password. See the section called "Creating Users and Groups", the section called "Modifying User and Group Properties" and the section called "Changing a User Password".
Groups	Lists all groups that the selected user or group belongs to. You can assign the selected user or groups to additional groups, or remove them from groups. See the section called "Groups - adding a User or Group to a Group".
Members	Available for groups only. Lists the members of a particular group. See the section called "Members - adding Users or Groups to a Group".
Page Permissions	Lets you control the permissions related to particular pages. You can allocate permissions to a user or group. See the section called "Setting Page Permissions".
Replication Privilege	Replication privileges allow the user to replicate content to another environment (usually from author to publish). You grant replication privileges according to a path. Privileges can be allocated to a user or group. See the section called "Setting Replication Privileges".
Privileges	Lets you allocate privileges, such as hierarchy modification, which gives the ability to create and delete pages. See the section called "Setting Privileges".
Impersonators	Lets another user impersonate the account. Useful when you need a user to act on behalf of another user. See the section called "Setting User and Group Preferences".
Preferences	Sets preferences for the group or user. For example, language preferences. See the section called "Impersonating Users".

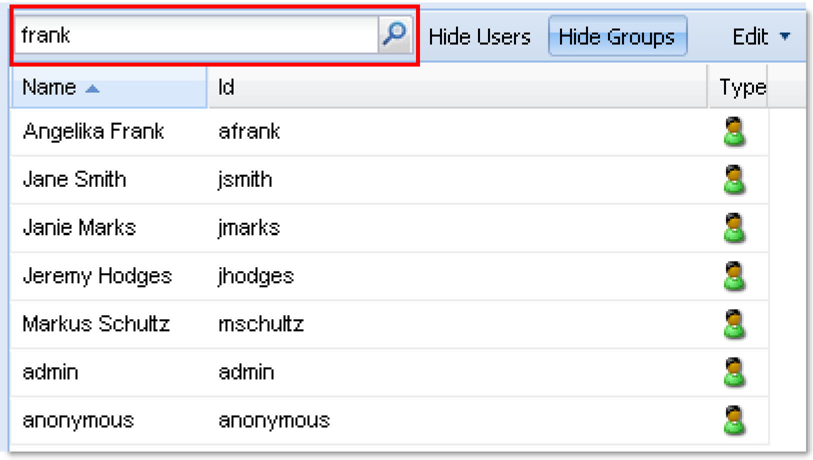
6.3.2 Filtering Users and Groups

You can filter the list by entering a filter expression, which hides all the users and groups that do not match the expression. You can also hide users and groups by using the **`Hide User`** and **`Hide Group`** buttons. See the section called “Hiding Users and Groups”.

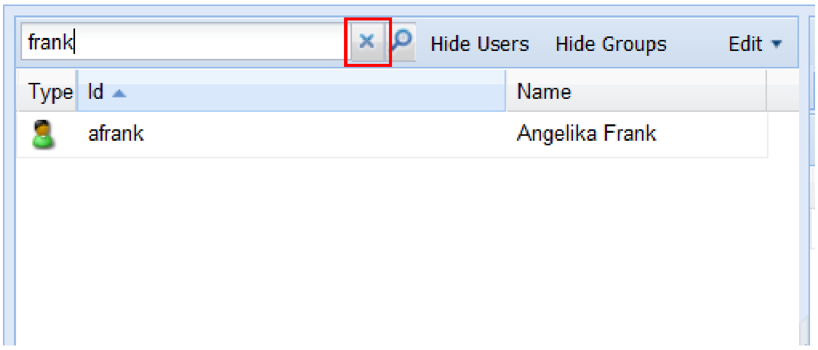
To filter users or groups:

1. In the left tree list, type your filter expression in the space provided. For example, entering **`min`** displays all users and groups containing this string.

2. Click the magnifying glass to filter the list.



3. Click the **x** when you want to remove all filters.

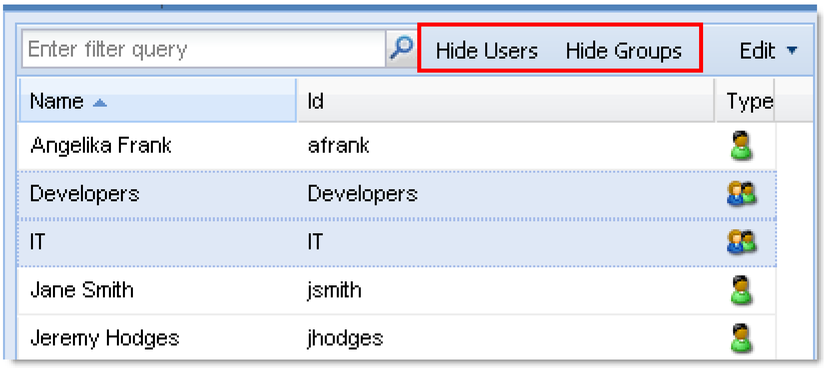


6.3.3 Hiding Users and Groups

Hiding users or groups is another way to filter the list of all users and groups in a system. There are two toggle mechanisms. Clicking **`Hide User`** hides all users from view and clicking **`Hide Groups`** hides all groups from view (you cannot hide both users and groups at the same time). To filter the list by using a filter expression, see Filtering users and groups.

To hide users and groups:

1. In the security window, click **`Hide Users`** or **`Hide Groups`**.

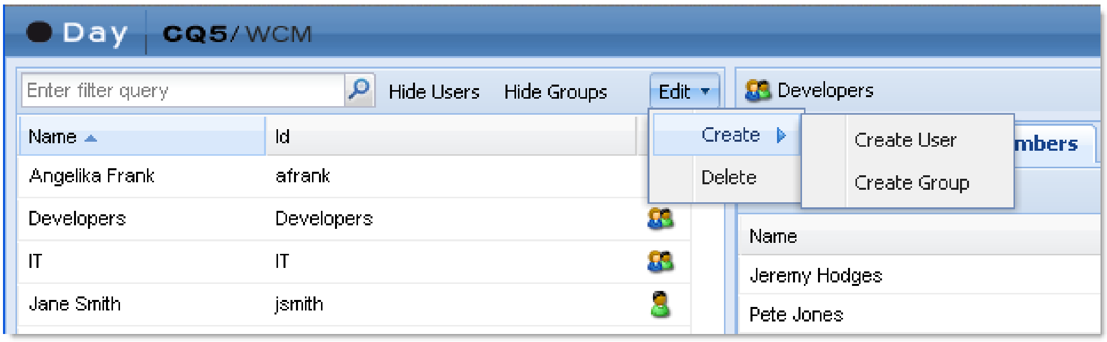


2. To make either users and/or groups reappear, click the corresponding button again.

6.3.4 Creating Users and Groups

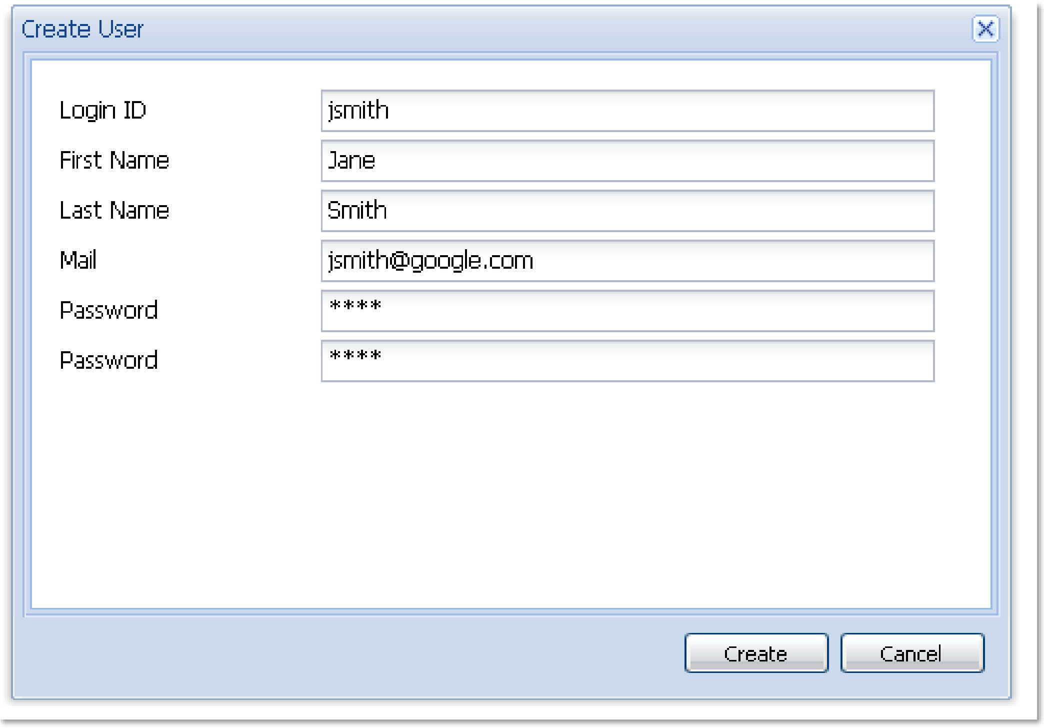
To create a new user or group:

1. In the **`Security`** window tree list, click **`Edit`** and then either **`Create User`** or **`Create Group`**.

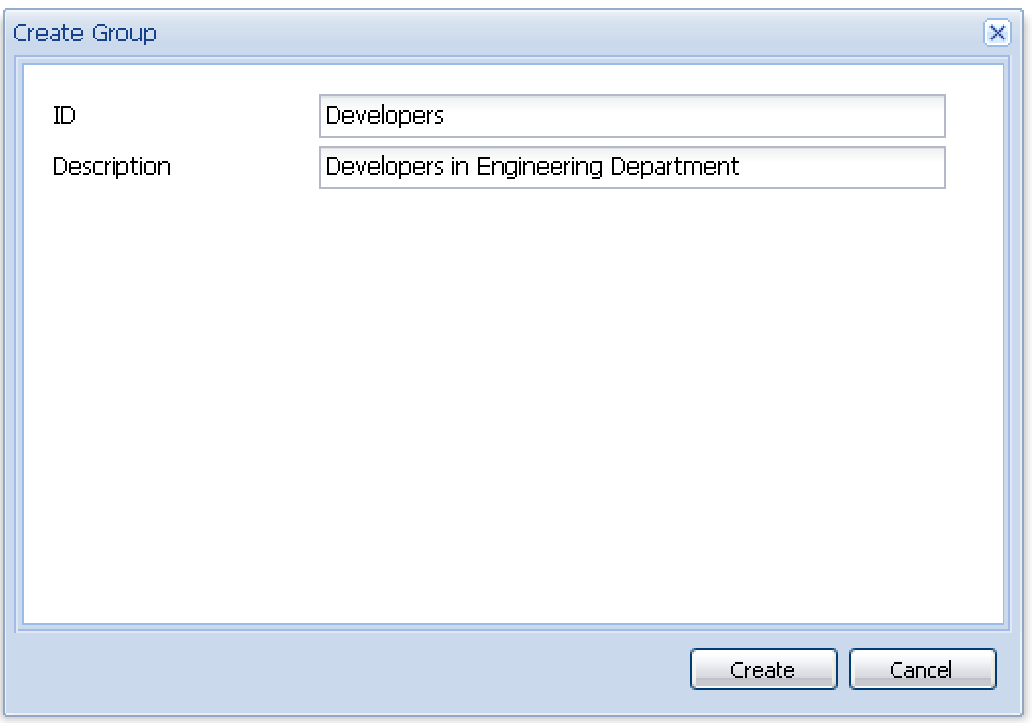


2. Enter the required details, according to whether you are creating a user or a group.

   a. If you select **`Create User`**, you enter the Login ID, first and last name, email address and a password.



b. If you select **`Create Group`**, you enter a group ID and an optional description.



3. Click **`Create`**. The user or group you created appears in the tree list.

6.3.5 Deleting Users and Groups

To delete a user or group:

1. In the **`Security`** window, select the user or group you want to delete. If you want to delete multiple items, **`Shift+click`** or **`Control+click`** to select them.

2. Click **Edit**, then select **Delete**. CQ WCM asks whether you want to delete the user or group.

3. Click **OK** to confirm or **Cancel** to cancel your action.

6.3.6 Modifying User and Group Properties

To modify user and group properties:

1. In the **Security** window, **double-click** the user or group name you want to modify.

2. Click the **Properties** tab, make the required changes and click **OK**.

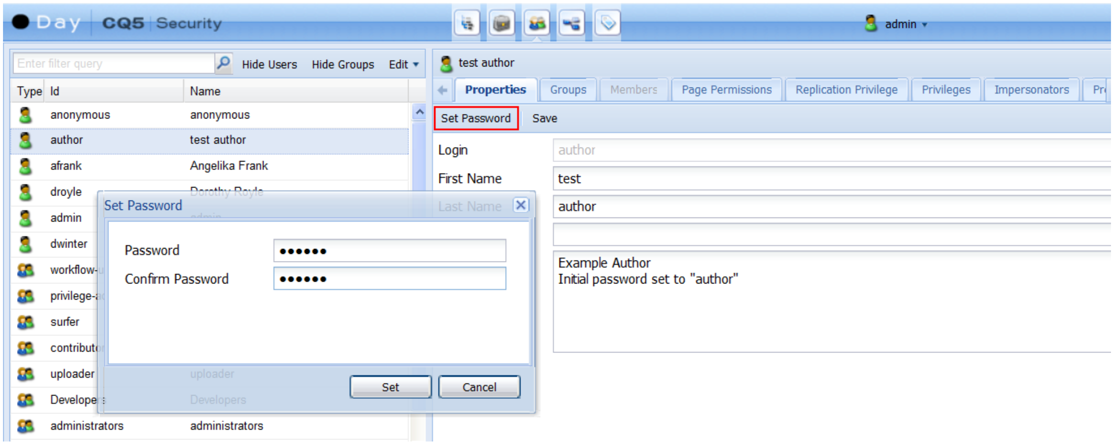
6.3.7 Changing a User Password

To modify a user's password:

1. In the **Security** window, **double-click** the user name you want to change the password for.

2. Click the **Properties** tab (if not already active).

3. Click **Set Password**, a new dialog will open where you can enter the new password:



4. Enter the new password twice; as they are not displayed in clear text this is for confirmation - if they do not match, the system will show an error.

5. Click **Set** to activate the new password for the account.

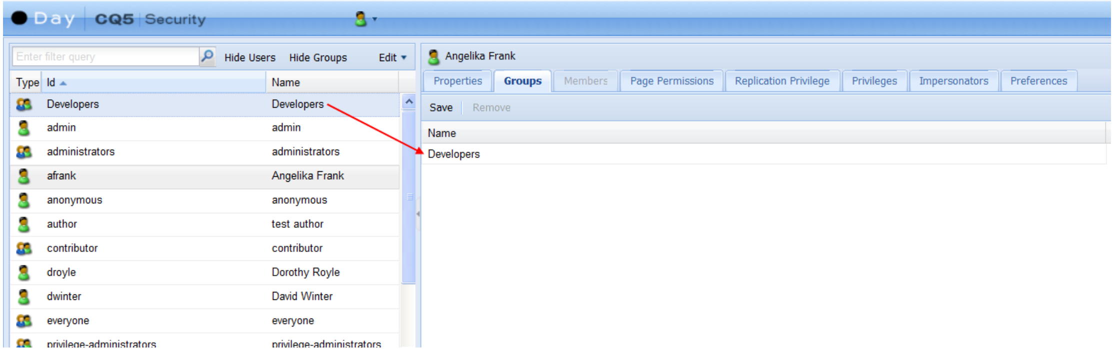
6.3.8 Groups - adding a User or Group to a Group

The Groups tab shows you which groups the current account belongs to. You can use it to add the selected account to a group:

1. **Double-click** the name of the account (user or group) that you want to assign to a group.

2. Click the **Groups** tab. Now you will see a list of groups that the account already belongs to.

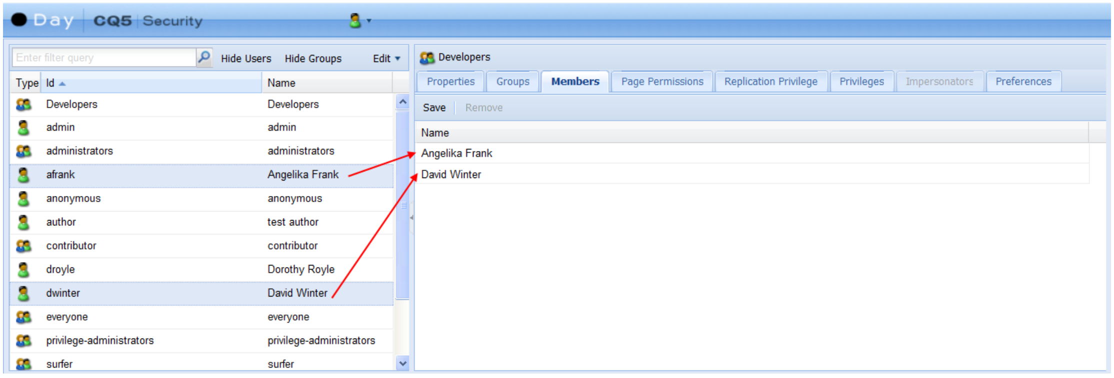
3. In the tree list, click the name of the group you want to add to the account to and drag it to the **Groups** pane. (If you want to add multiple users, **Shift+click** or **Control+click** those names and drag them.)



6.3.9 Members - adding Users or Groups to a Group

The Members tab only works for groups and shows you which users and or groups belong to the current group. You can used it to add accounts to a group:

1. **`Double-click`** the name of the group you want to add members to.
2. Click the **`Members`** tab. Now you will see which users and/or groups already belong to this group.
3. In the tree list, click the name of the user you want to add to the group and drag it to the **`Members`** pane. (If you want to add multiple users, **`Shift+click`** or **`Control+click`** those names and drag them.)

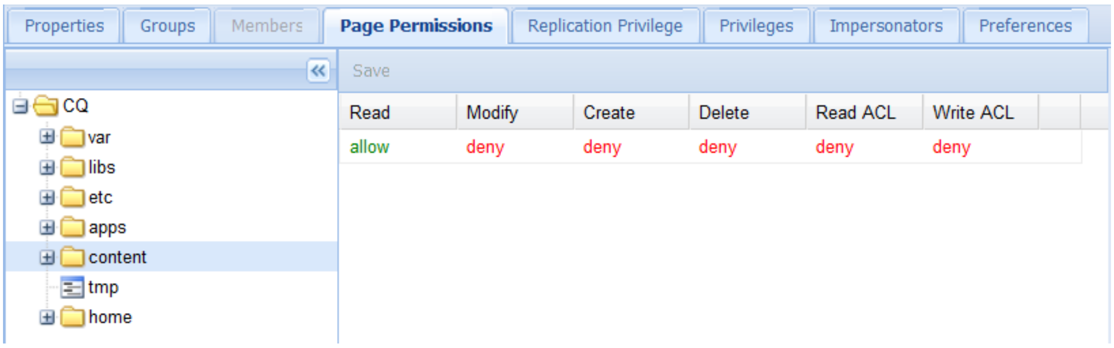


4. After you have added all the users to your group, click **`Save`**.

6.3.10 Setting Page Permissions

To add, modify or delete page permissions, which enables you to allow or deny the right to perform actions on specific resources:

1. **`Double-click`** the name of the user or group you want to add page permissions to.
2. Click the **`Page Permissions`** tab. The tree map will open.
3. Select the page you want to add permissions for (or modify, or delete):



4. **`Double-click`** the permission state that you want to change. A drop down list will show the possible states. See the section called “Permissions”.

5. Change as required and click **Save**.

6.3.11 Setting Replication Privileges

Replication privilege is the right to publish content, and it can be set for groups and users.

To set replication rights:

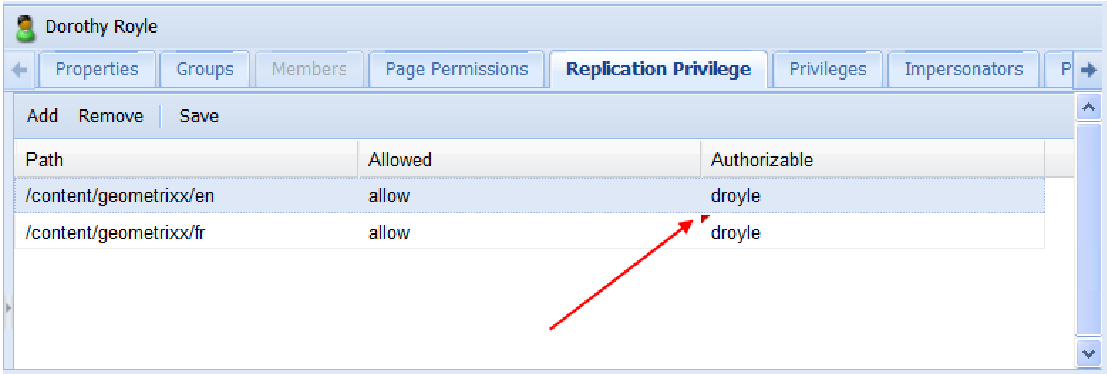
1. Select the user or group from the list, double-click to open, and click **`Replication Privilege`**.

2. Click **Add**. CQ WCM opens a tree list of the site.

3. Navigate to the page you want to give the user or group replication privileges to and double-click for it to be selected and listed in the main pane.

   The red corner indicates that the item listed has not been saved yet.

   The Authorizable column shows through which user or group the permissions are being applied.



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

Note

- Any replication rights applied to a group apply to all the users in that group.
- A user's replication privileges supersedes a group's replication privileges.
- The Allow replication rights have a higher precedence than the Deny replication rights. See Section 6.2.4.2, “Access Control Lists and how they are evaluated” for more information.

6.3.12 Setting Privileges

Privileges are used to assign access to the functionality within the application.

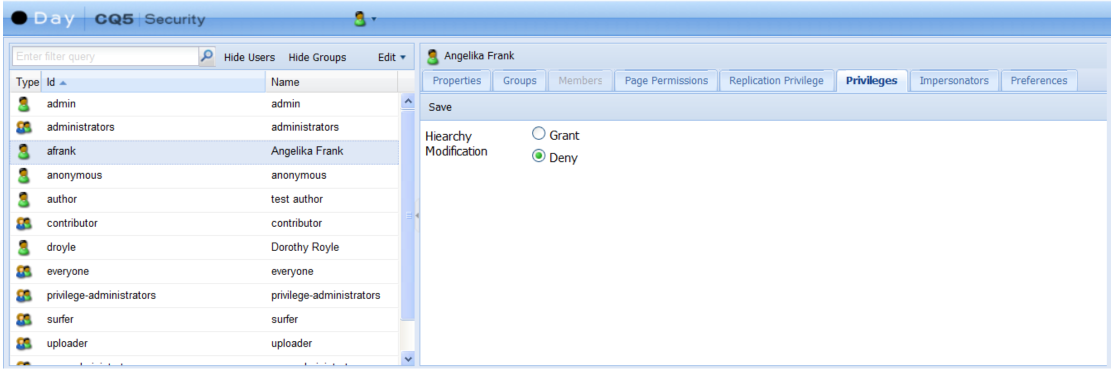
Standard privileges included in the installation of CQ WCM are for modifying the hierarchy; in other words, creating or deleting pages.

Note

The list of privileges available may be extended for your project.

1. Select the user or group from the list, double-click to open, and click **`Privileges`**.

2. The privileges available will be shown. Select **Grant** or **Deny** as required.



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

6.3.13 Impersonating Users

You can specify one or more users that are allowed to impersonate the current user. This means they can switch their account settings to those of the current user and act on behalf of this user.

Note

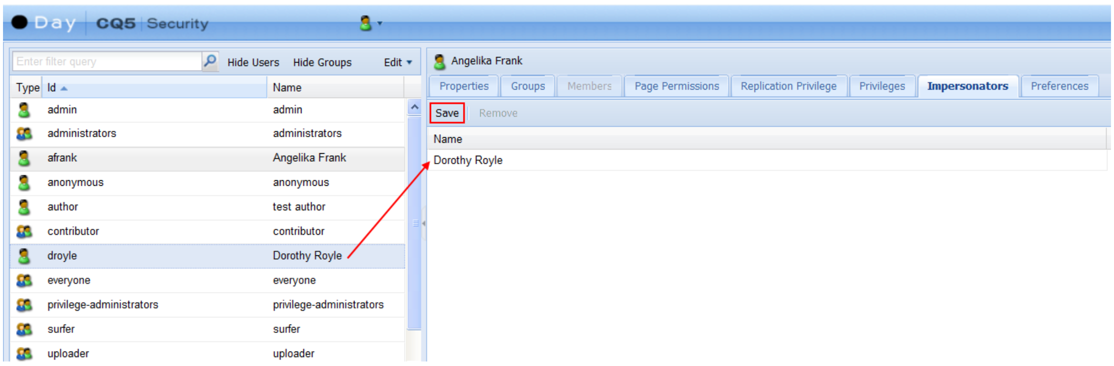
Use this function with caution as it may allow users to perform actions that their own user cannot. When impersonating a user, users are notified that they are not logged in as themselves.

There are various scenarios when you may want to use this functionality, including:

- If you are out of the office, you can let another person impersonate you while you are away. By using this feature, you can make sure that somebody has your access rights and you do not need to modify a user profile or give out your password.
- You can use it for debugging purposes. For example, to see how the Web site looks for a user with restricted access rights. Also, if a user complains about technical problems, you can impersonate that user to diagnose and fix the problem.

To impersonate an existing user:

1. In the tree list, select the name of the person who you want to assign other users to impersonate. **Double-click** to open.
2. Click the **Impersonate** tab.



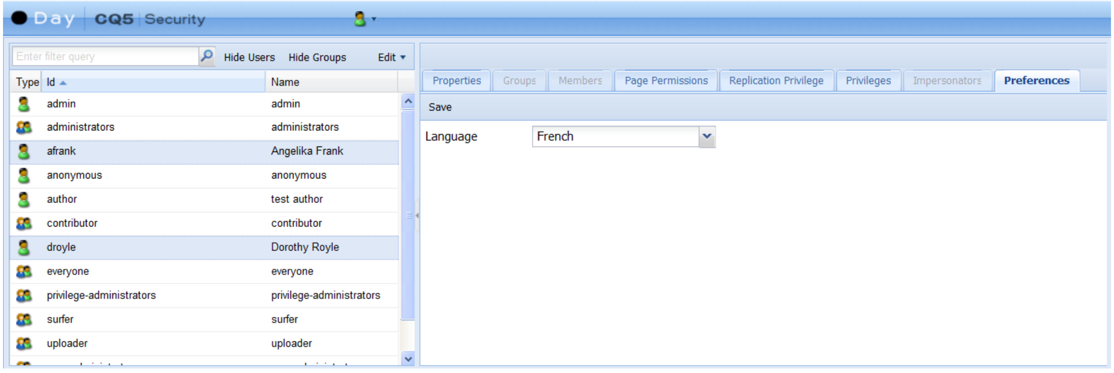
3. Click the user you want to be able to impersonate the selected user. Drag the user (who will impersonate) from the list to the **Impersonate** pane. The name appears in the list.
4. Click **Save**.

6.3.14 Setting User and Group Preferences

To set user and group preferences:

1. Select the user or group whose preferences you want to change in the left-hand tree. To select multiple users or groups, **`Ctrl+click`** or **`Shift+click`** your selections.

2. Click the **`Preferences`** tab.



3. Make changes, as necessary to the group or user preferences and click **`Save`** when finished.

7 Working with Workflows

CQ5 encompasses several applications which are designed to interact and complement each other. In particular, the Workflow Engine can be used in tight conjunction with several of the other applications.

For example, within CQ5, Web Content Management (CQ WCM) is key. This enables you to generate and publish pages to your website. This functionality is often subject to organizational processes, including steps such as approval and sign-off by various participants. These processes can be represented as workflows, which in turn can be defined within CQ, then applied to the appropriate content pages.

This section will covers using Workflows in conjunction with CQ WCM:

- create and edit a new workflow
- start an instance of the workflow by applying it to a page of content
- complete a step requiring user action
- take additional actions on a workflow; for example, suspend, resume, terminate
- monitor workflow instances
- investigate the history of archived workflows (which have finished, or been terminated)

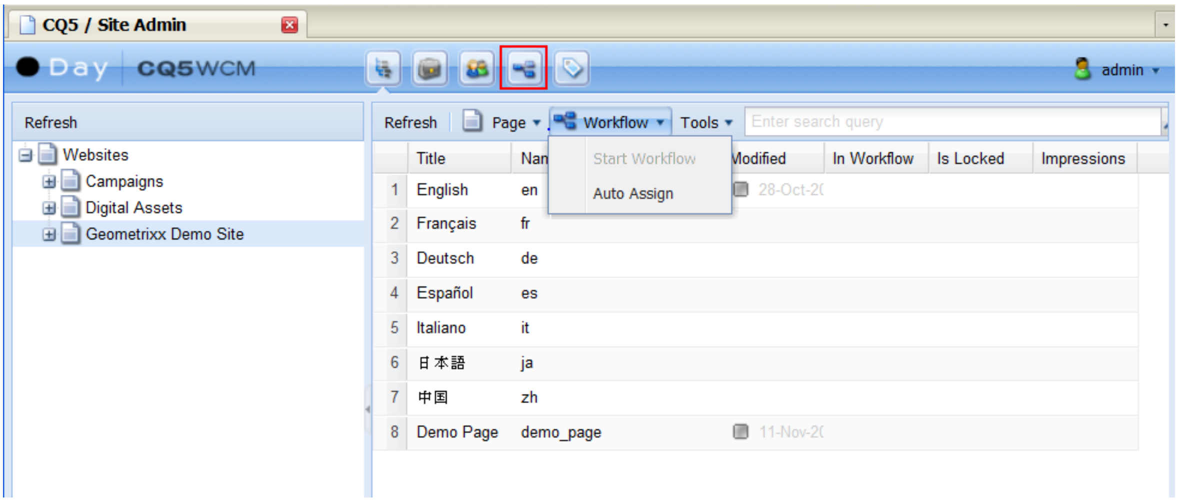
7.1 Authorization needed for working with Workflows

Actions on workflows can only be undertaken if:

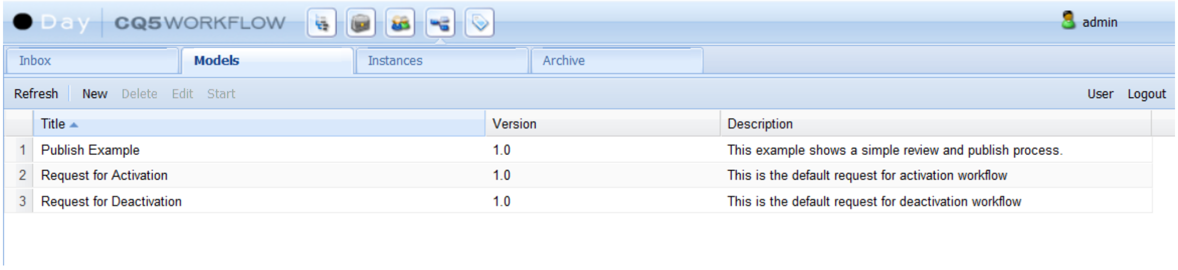
- you are working with the `admin` account
- the account has been assigned to the default group **`workflow-users`**, which holds all the privileges necessary for your users to perform workflow actions.

7.2 The Workflow Console

The Workflow console is the centralized location for workflow management in CQ. It can be accessed via the main icon (certain workflow functions can also be accessed via the Workflow menu within wcm/siteadmin):



Within the console there are 4 tabs:



Inbox
: Lists workflows awaiting action in your inbox. You can then take action as required.

Models
: Lists the workflow models currently available. Here you can create, edit or delete workflow models.

Instances
: Shows you details of workflow instances which are currently active. These instances are also version dependent.

Archive
: Enables you to access details of workflow instances which have terminated, for whatever reason.

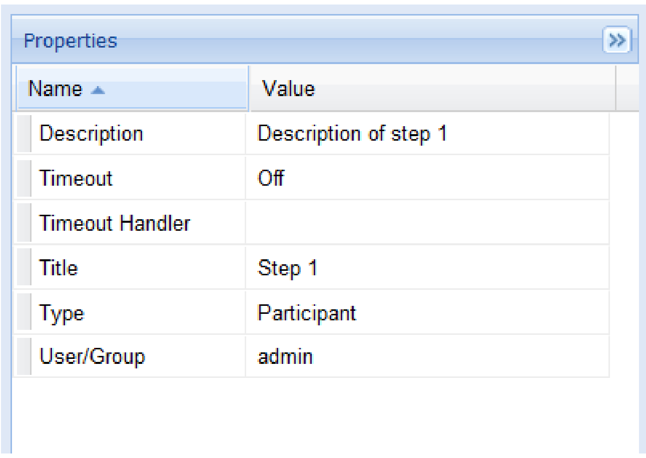
7.3 The types of Workflow Steps available

To build your workflow CQ provides various steps types which can be combined, and extended with scripts to provide the functionality and control you require.

7.3.1 Participant Step

A participant step enables you to assign ownership for a particular action. The workflow will only proceed when the user has manually acknowledged the step. This is used when you want someone to take an action on the workflow; for example, a review step.

Although not directly related, user authorization must be considered when assigning an action; the user must have access to the page.



The following properties are available:

Description
: A description of the step.

Timeout
: The period after which the step will be "timed out". You can select between **`Off`**, **`Immediate`**, **`1h`**, **`6h`**, **`12h`**, **`24h`**.

Timeout Handler

The handler which will control the workflow when the step times out; for example **`com.day.cq.workflow.timeout.autoadvance.AutoAdvancer`**.

Title

You can enter your own title for the step.

Type

Defines the step type. You can change this if required, though only parameters which exist for the new type will retain the values you have already defined.

User/Group

A drop down selection box will allow you to navigate and select a user or group.

If you assign the step to a specific user, then only this user can take action on the step.

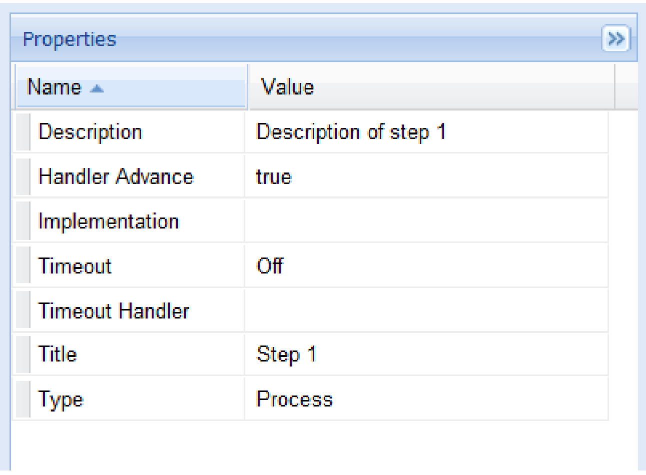
If you assign the step to an entire group, then when the workflow reaches this step all users in this group will have the action in their **`Workflow Inbox`**.

See Delegating a Participant Step for more information on how this can affect your workflow.

7.3.2 Process Step

A process step allows you to specify scripts to be executed.

This is used when you want automated processing to occur; for example to trigger an external application.



Properties

Name	Value
Description	Description of step 1
Handler Advance	true
Implementation	
Timeout	Off
Timeout Handler	
Title	Step 1
Type	Process

The following properties are available:

Description

A description of the step.

Handler Advance

If **`true`** a handler will automatically *advance* the workflow to the next step after execution. If **`false`**, the implementation script must handle this.

Implementation

You can select the script to be executed from a drop down list.

Timeout

The period after which the step will be "timed out". You can select between **`Off`**, **`Immediate`**, **`1h`**, **`6h`**, **`12h`**, **`24h`**.

Timeout Handler

The handler which will control the workflow when the step times out; for example **`com.day.cq.workflow.timeout.autoadvance.AutoAdvancer`**.

Title

You can enter your own title for the step.

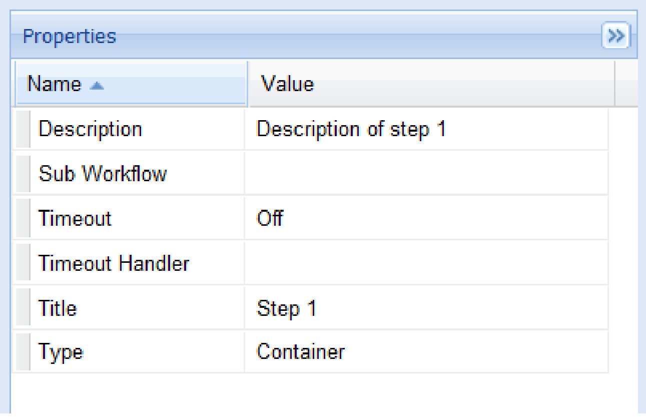
Type

Defines the step type. You can change this if required, though only parameters which exist for the new type will retain the values you have already defined.

7.3.3 Container Step

A container step enables you to connect workflows, by referencing a child workflow.

This can allow you to reuse a workflow (or sub-workflow); for example a translation process which is used in multiple editing workflows.



Properties

Name	Value
Description	Description of step 1
Sub Workflow	
Timeout	Off
Timeout Handler	
Title	Step 1
Type	Container

The following properties are available:

Description

You can enter a description of the step.

Sub Workflow

This references a sub workflow.

Timeout

The period after which the step will be "timed out". You can select between **`Off`**, **`Immediate`**, **`1h`**, **`6h`**, **`12h`**, **`24h`**.

Timeout Handler

The handler which will control the workflow when the step times out; for example **`com.day.cq.workflow.timeout.autoadvance.AutoAdvancer`**.

Title

You can enter your own title for the step.

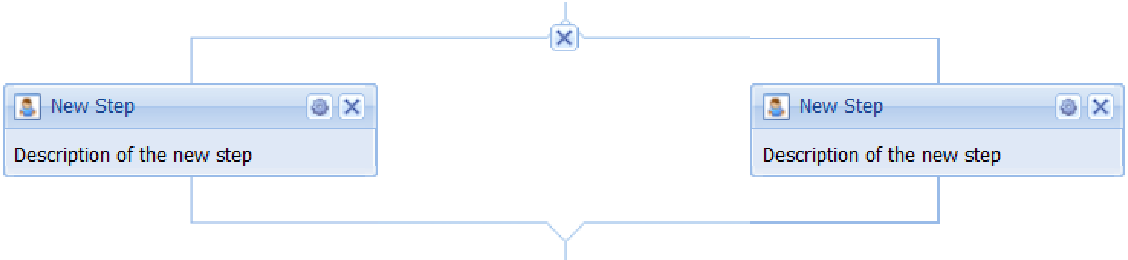
Type

Defines the step type. You can change this if required, though only parameters which exist for the new type will retain the values you have already defined.

7.3.4 AND Split

An **`AND Split`** creates a split in the workflow; both branches will be active. This enables you to introduce multiple processing paths into the workflow; for example allowing certain review steps to occur in parallel, thus saving time.

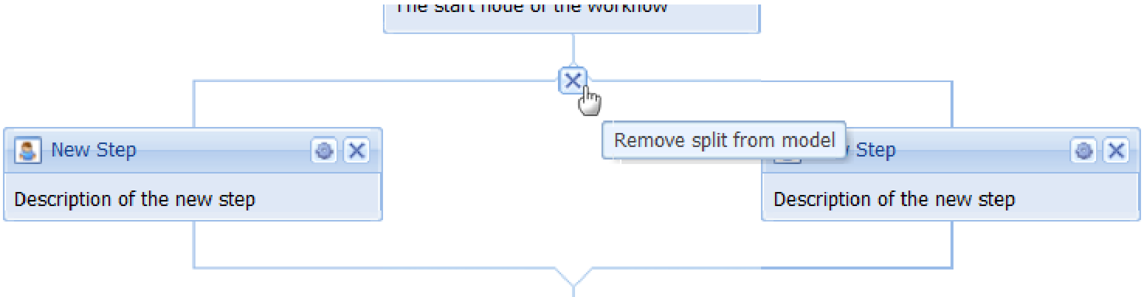
Selecting this will add two branches to the workflow, each with a **`Participant`** step:



After creating such an instance you must edit both of the **`New Step`** instances. You can then add extra process, participant or container steps to either branch as required.

To delete an **`AND Split`**, click on the delete icon

which appears when you position your mouse over the branch split (or join):



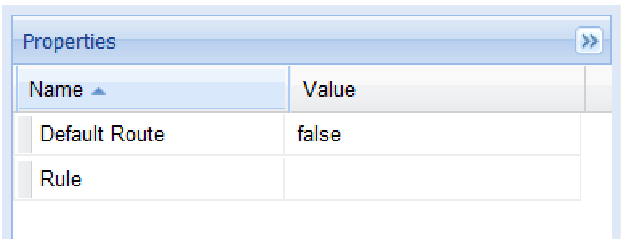
7.3.5 OR Split

Create a split in the workflow, whereby only one branch will be active. This allows you to introduce conditional processing paths into your workflow.

Selecting this will add two branches to the workflow, with a **`New Step`** in each branch:

The edit icons

on each branch allow you to define when this branch is used:



You can define:

Default Route
: You can define which branch is followed if no rules have been defined on either branch, or neither are fulfilled. You cannot set both branches to the same value.

Rule

Here you can define the path to a script which contains the logic controlling whether a particular branch will be activated.

For example, if you reference the sample script `/etc/workflow/scripts/rule-false.ecma` then false will always be returned:

```
function check() {
    return false;
}
```

After creating such an instance you must edit both of the **`New Step`** instances. You can then add extra process, participant or container steps to either branch as required.:

As with **`AND Split`**, to delete an **`OR Split`** click on the delete icon

which appears when you position your mouse over the branch split (or join).

7.4 Creating a Workflow

First you must create your workflow. You can then apply an instance of this (version dependent) when managing your website.

Important

Actions on workflows can only be undertaken if:

- you are working with the `admin` account
- the account has been assigned to the default group **`workflow-users`**, which holds all the privileges necessary for your users to perform workflow actions.

Note

For simplicity, the following examples have all been made using the `admin` account.

7.4.1 Creating a new Workflow Model

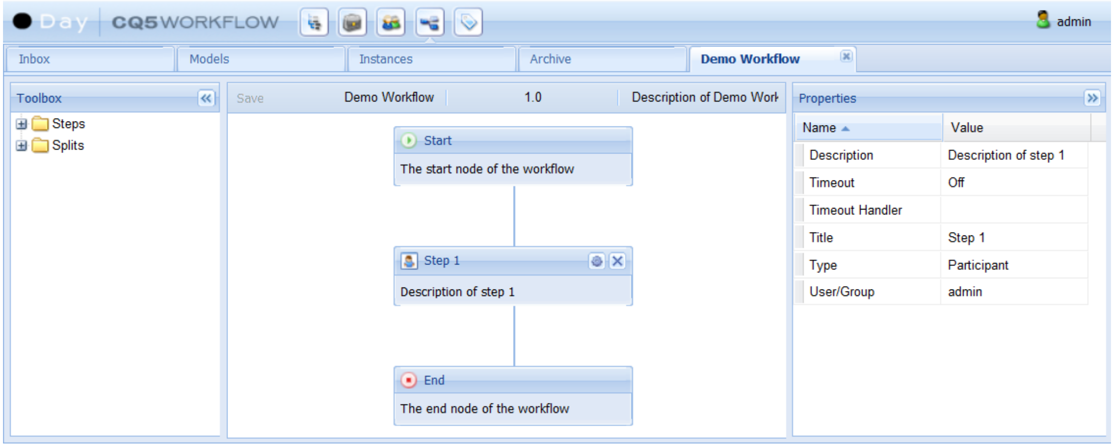
The actual creation is a small step - a skeleton workflow (with 3 default steps) will be created.

1. Open the Workflow console.
2. From the **`Models`** tab, select **`New`** from the top navigation bar. The **`New Workflow`** dialog will open.
3. Specify the **`Title`** for your workflow.
4. Click **`OK`** to save and close the dialog. You will be returned to the **`Models`** tab, where you see your new workflow in the list.

7.4.2 Editing the Workflow

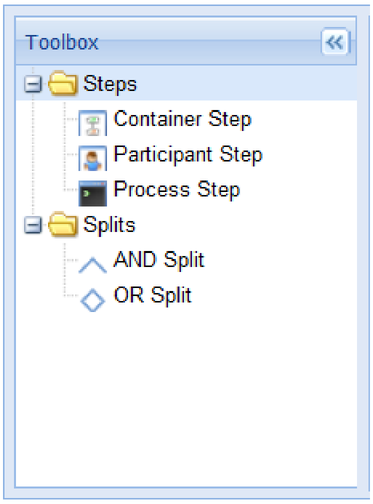
As mentioned above, a skeleton workflow is created with a minimum of steps. For the workflow to become meaningful, you must edit it immediately.

1. Open the Workflow console.
2. From the **`Models`** tab, select your workflow.
3. Either click **`Edit`** or **`double-click`** the name of the workflow. A new tab (named after the workflow) will open for editing and configuring a workflow. This shows 3 panes:



- **`Toolbox`**

  Lists the **`Step`** and **`Split`** types. Click to display the appropriate list, then use drag the element you want into the appropriate position to build your workflow.



Note

A complete explanation of all types of workflow steps and splits, together with their related properties, can be found in the next section - the section called “The types of Workflow Steps available”.

- **`Workflow Model`**

  Contains the graphical representation of your workflow. Here you can position the steps and splits, edit the workflow name or description and save changes.

  The **Save** button is also located here, as is the **`Model Version`**. The **`Model Version`** is incremented every time the workflow model is updated. This is reflected in the monitoring displays. As multiple versions of a workflow can be in use at any one time, this helps you track the version being used in each instance.

- **`Properties`**

  Allows you to edit properties of the individual steps and splits.

Note

A complete explanation of all types of workflow steps and splits, together with their related properties, can be found in the next section - the section called “The types of Workflow Steps available”.

Three steps have already been created:

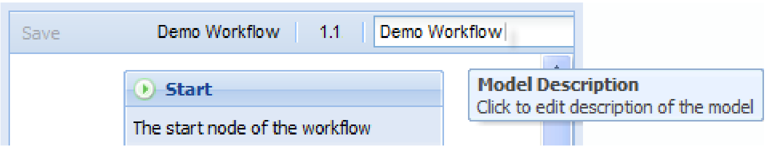
Start
: A mandatory step to start the workflow. This cannot be edited, nor deleted.

Step 1
: A Participant step which is an example. This must be edited, or replaced if required. Further steps can be added.

End
: A mandatory step for every workflow. The End step is used to cleanly terminate the workflow, or to pass control back to the parent workflow if used as a child workflow.

You can either define a full workflow, or a sub-section of a workflow. Sub-workflows can then be referenced by other workflows to form part of a complete workflow. This simplifies the construction of complex workflows, and also allows you to reuse sub-workflows which occur repeatedly.

4. Enter a **`Model Description`** for the workflow (you can also edit the **`Model Title`**) from the center pane. Click on the field to enter edit mode.



5. You can now design your workflow by dragging steps onto the Workflow Model, then configuring the properties.

6. When finished, **Save** your model, then close the tab.

7.4.2.1 Example

To illustrate some of the possibilities for creating a workflow, the following example emulates a variation of the **Publish Example** workflow.

1. Edit **`Step 1`** using

   on the step itself.

   a. Enter **`Validate Content`** for the **`Title`** and **`Description`**.

   b. Set the **`User/Group`** to `admin`.

   c. Set the **`Timeout`** to **`Off`** and **`Timeout Handler`** empty.

2. Click on **`Splits`** to display the list of split types.

3. Drag an **`Or Split`** onto the workflow and position it between **`Validate Content`** and **`End`**.

   An **`Or Split`** will be added to your workflow.

4. Edit the left-hand branch:

   a. Click the
      
      icon on the actual branch.

   b. Set **Default Route** to true.

   c. Click the
      
      icon on **New Step** in the left-hand branch. This will be a **Participant** step.

   d. Enter **Cancel Publish** for the **Title** and **Description**.

   e. Set the **User/Group** to `admin`.

5. Edit the right-hand branch:

   a. Click the
      
      icon on the actual branch.

   b. Set **Default Route** to false.

   c. Leave the **Rule** empty. This is for demonstration purposes.

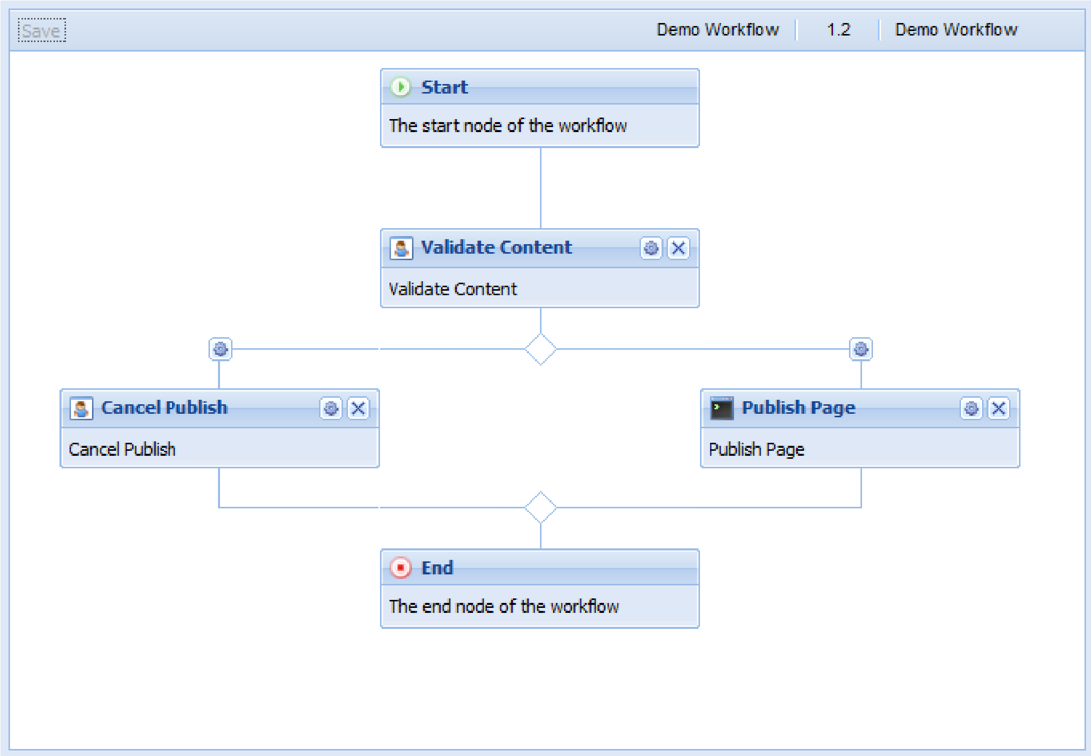
   d. Click the
      
      icon on **New Step** in the right-hand branch. Change this from a **Participant** to a **Process** step; the properties available will be updated.

   e. Enter **Publish Page** for the **Title** and **Description**.

   f. Set the **Handler Advance** to **false**.

   g. Select **com.day.cq.workflow.example.publish.PublishProcess** as the Implementation script. This implementation will publish the selected page to the publisher instances.

6. Now you have specified all steps in your workflow, click **Save**.



7. Finally close the tab and return to the main console.

7.5 Using the Workflow

After you have defined your workflow you will want it to be used when managing your website. The following sections detail the different tasks when using workflows.

7.5.1 Starting the Workflow for an individual page

There are two methods of starting a workflow; from the Workflow Console or the siteadmin:

In either case you need to link a workflow to its payload. The payload (including pages, nodes, resources) will then be subject to this instance of the workflow.

Important

The current version of the workflow model is assigned; if the main copy of the workflow is updated later then the changes will have no impact on the instance assigned.

Procedure 7.1. Starting a workflow from the workflow console

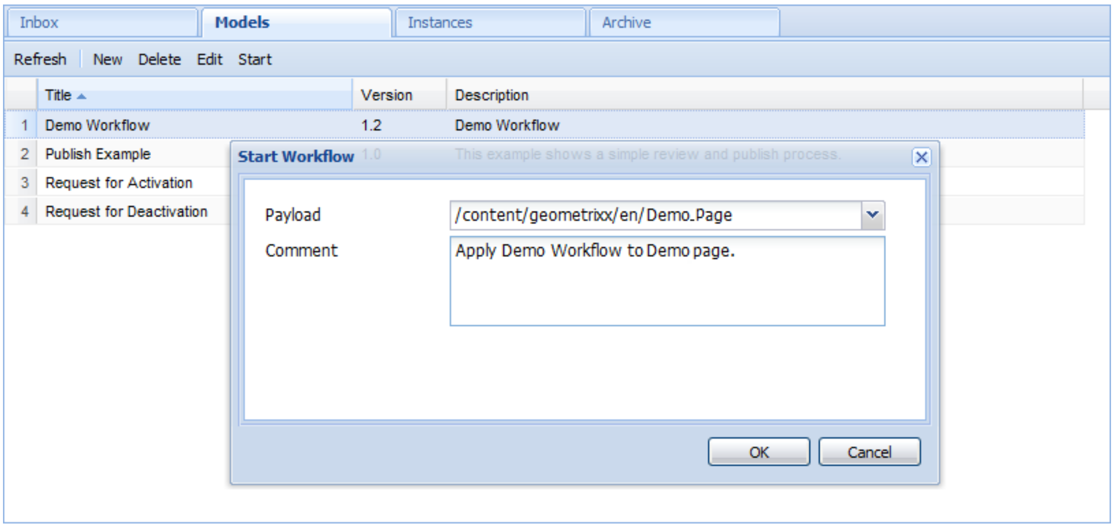
1. Open the Workflow console.

2. From the **`Models`** tab select the required workflow.

3. Click **`Start`** from the top navigation.

4. The **`Start Workflow`** dialog opens allowing you to enter the **`payload`** and a **`comment`**.

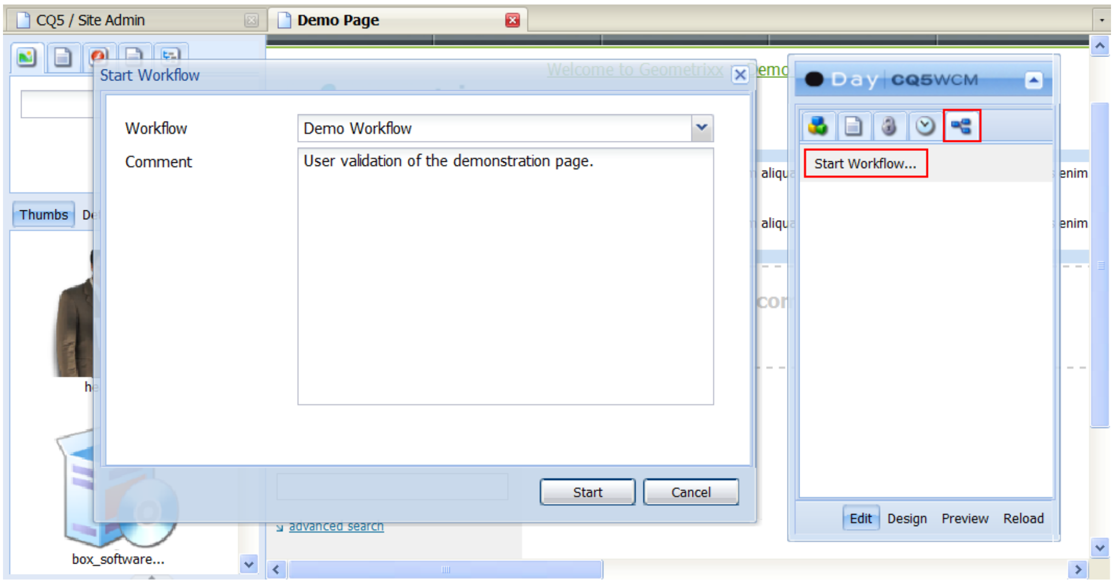
   Specify the **`payload`** (includes pages, nodes, resources, etc) to which the workflow is to be applied. You can use the drop down selector to browse the repository when selecting:



5. Click **OK** to save your selection and start the workflow. Now the workflow is running.

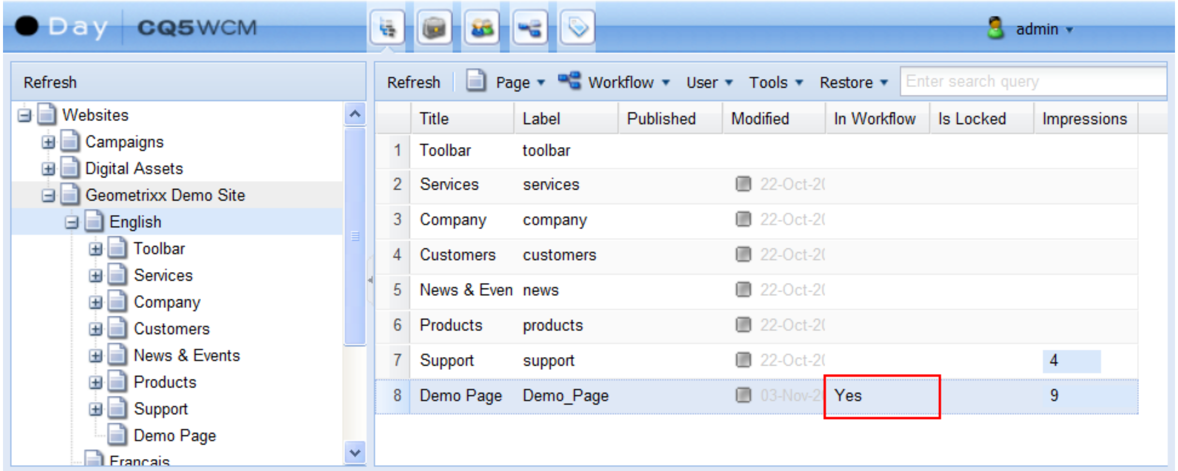
Procedure 7.2. Starting a workflow from the sidekick

1. Open the siteadmin.
2. Open the required page.
3. Select the Workflow tab from the sidekick.
4. Select **Start Workflow**... to open a new dialog allowing you to select the **workflow** and a enter a **comment**.



5. Click **Start** to save your selection and start the workflow. Now the workflow is running.

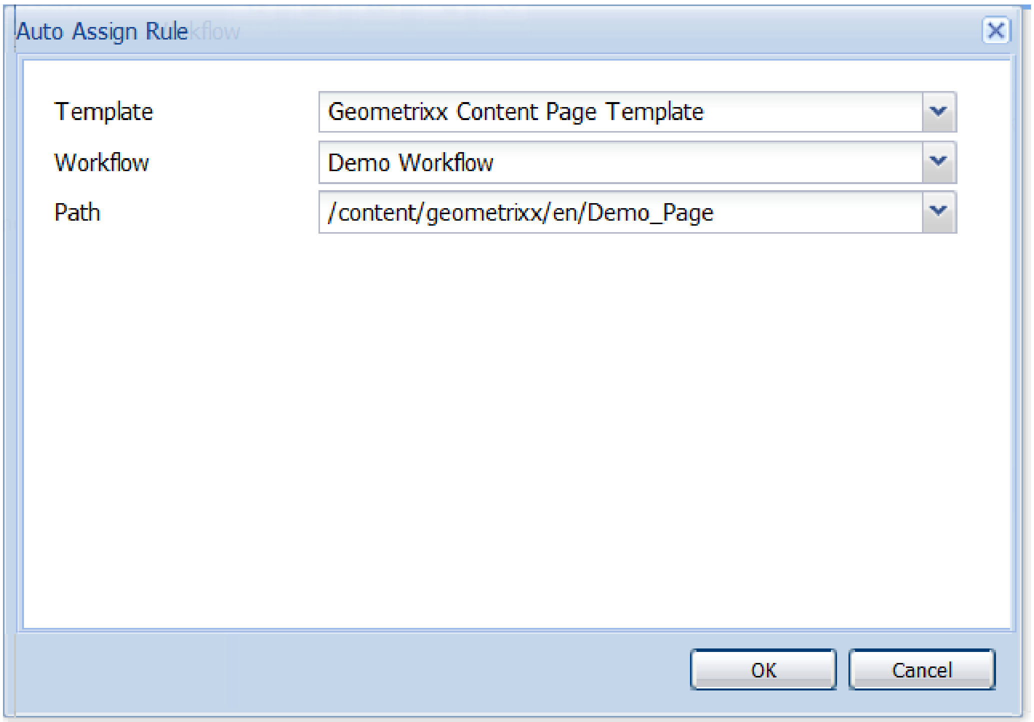
Once a page has been linked to a workflow it will be indicated in the siteadmin:



7.5.2 Automatically Assigning a Workflow

To simplify the action of starting a workflow it is possible to Auto Assign workflows. With this, you can automatically assign one or more workflows to a content tree, dependent on the page template being used. As soon as a page is created within this tree and with the specified template, the workflow is applied to that page.

1. Open the siteadmin.
2. Select the page at the root of the content tree. Any pages created underneath this page will be subject the specified workflow.
3. From the **`Workflow`** menu select **`Auto Assign`**. The **`Auto Assign Workflow`** dialog will open.
4. Click Add to open the **`Auto Assign Rule`** dialog:



This allows you to specify the:

Template
: Any page created using this template will be subject to the rule.

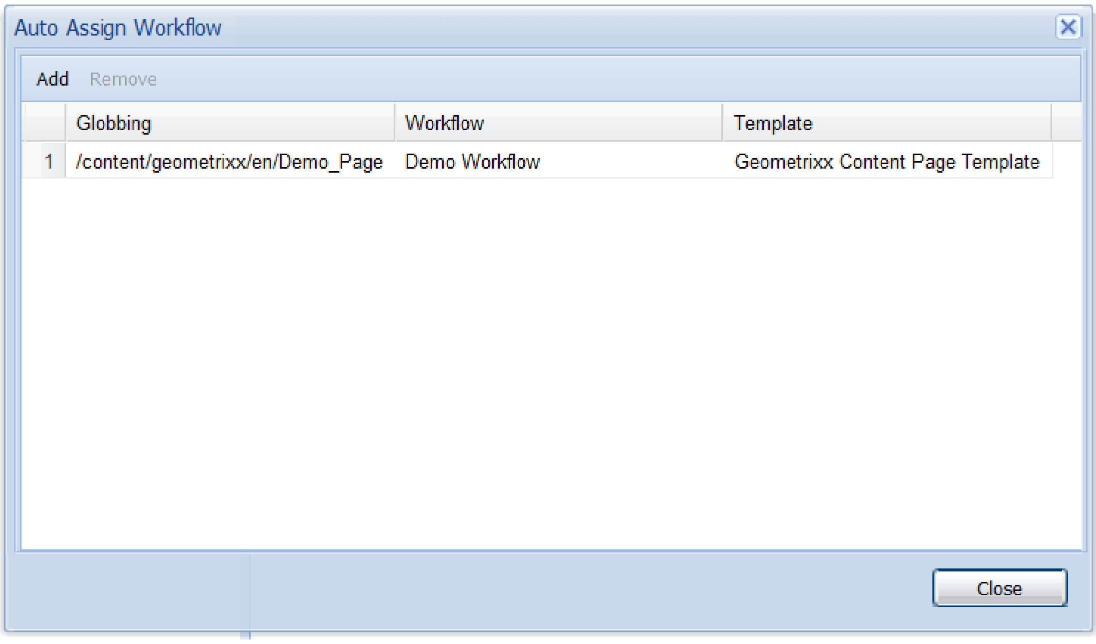
Workflow
: The workflow to be applied to any page created - with the specified template and in the given path.

Path
: Path to which the rule is applied.

5. Click **OK** to save the rule.

6. The rule will now be listed in the Auto Assign Workflow window.

> **Note**
>
> You can create several rules, so you must take care that the rules do not conflict.



7. Click **Close** to complete the definition. From now on, as soon as a page is created within the specified trees with the specified templates the appropriate workflows are applied. This will be indicated in the **In Workflow** column,

7.5.3 Taking actions on a Participant Step

Any participant steps that you have created will be assigned to the specific user or group, who will need to take action:

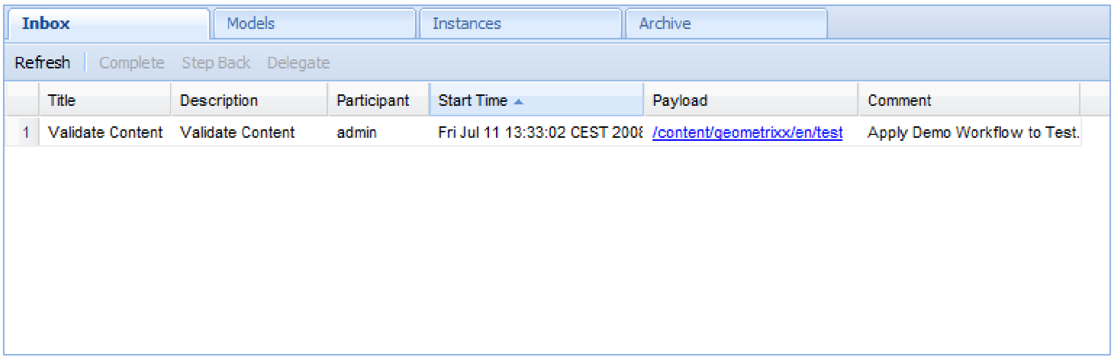
- When the task is completed they then acknowledge this fact by *completing* the workflow step (see Completing a Participant step).
- If the specific user(s) are unable to take action they can delegate responsibility to another user or group (see Delegating a Participant step).
- If necessary they can step back to repeat a section of the workflow (see Performing Step Back on a Participant step).

7.5.3.1 Selecting a Participant Step to take action

Before you can take any action on a Participant step, you need to select it:

1. Open the Workflow console.

2. Select the **Inbox** tab to see when an action is assigned to you. This occurs when a workflow reaches a **Participant step** with your account, or group, specified:



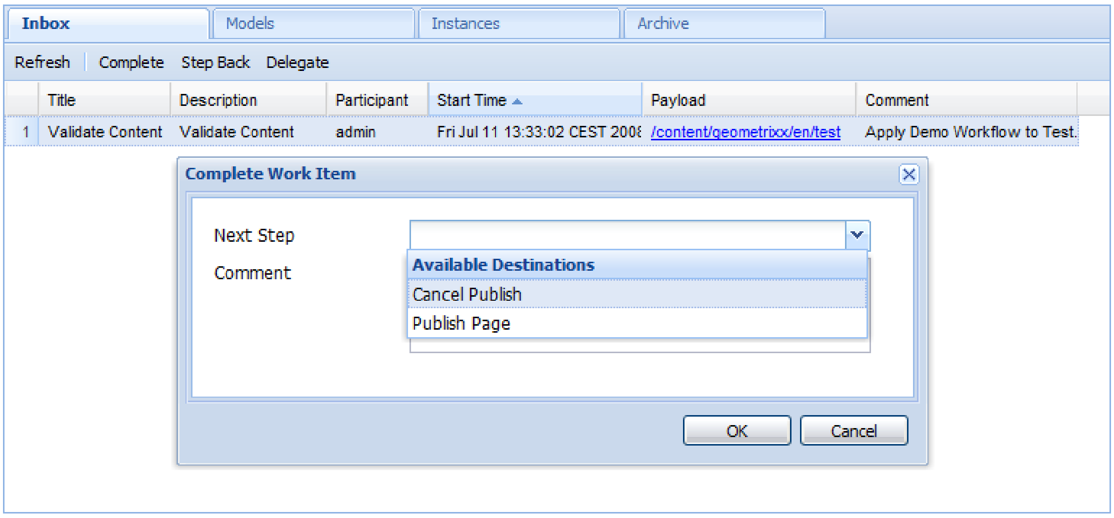
3. Select the entry.

7.5.3.2 Completing a Participant step

After you have taken the action indicated you can complete the workflow step, thus allowing the workflow to continue.

1. Click the **Complete** button in the top navigation bar.

2. In the resulting dialog, select the **Next Step**; that is, the step to execute next. A drop down list will show all appropriate destinations. A **Comment** can also be entered.



Note

The number of steps listed depends on the design of the workflow.

3. Click **OK** to confirm the action.

7.5.3.3 Delegating a Participant Step

If a step has been assigned to you, but for any reason you are unable to take action, you can *delegate* the step to another user or group.

1. Click the **Delegate** button in the top navigation bar.

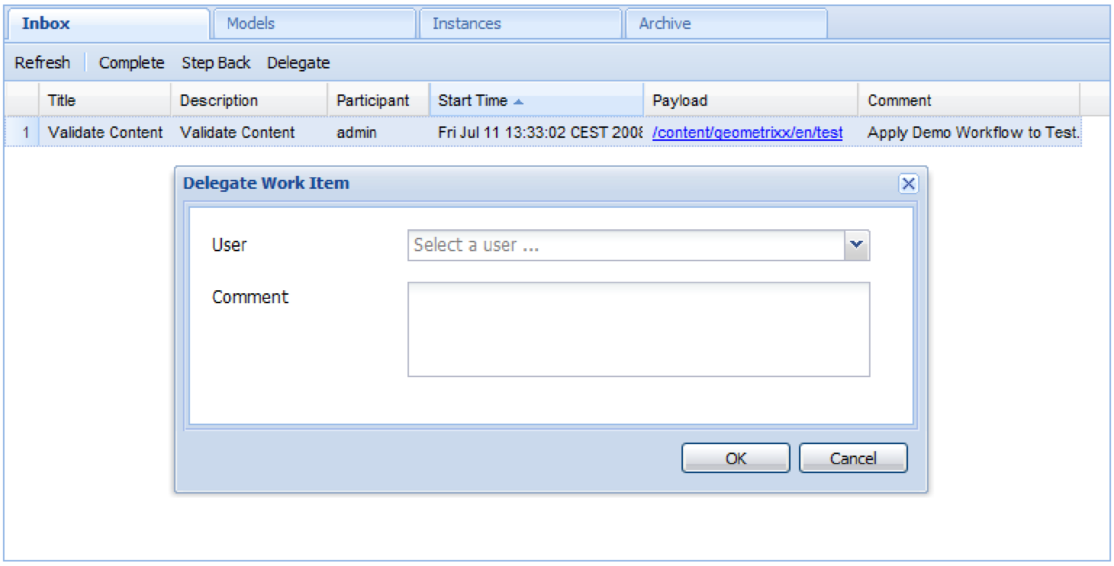
2. In the resulting dialog, select the **User** you want to pass the action to.

   A drop down list will show all appropriate users.

   If the step has been defined with one user, then only this user will be available - the step cannot be delegated to anyone else.

If a group has been defined, then the list will show the group itself and all individual users within the group. You can delegate to either the entire group, or an individual user within that group.

A **`Comment`** can also be entered.



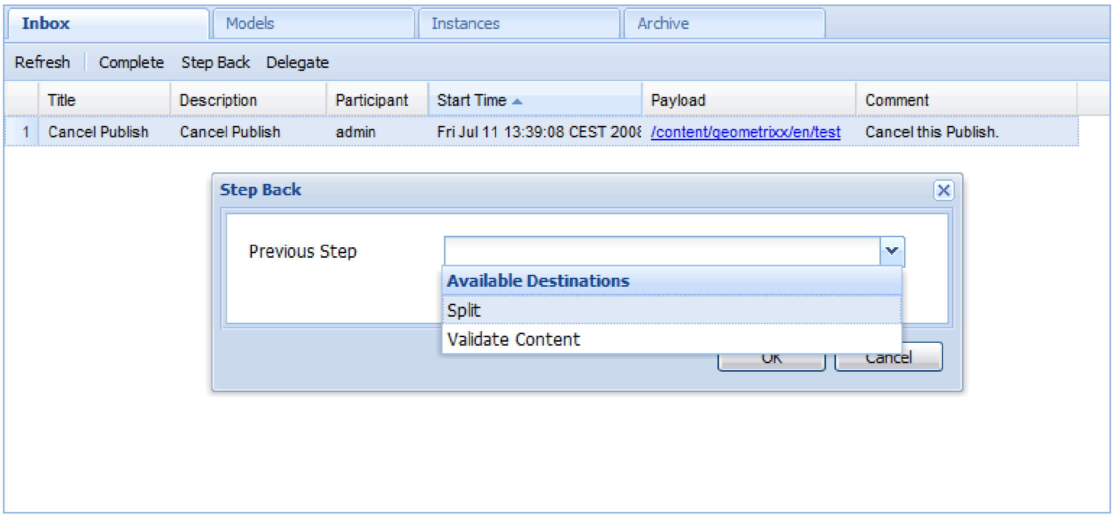
3. Click **`OK`** to confirm the action.

7.5.3.4 Performing Step Back on a Participant step

If you discover that a step, or series of steps, needs to be repeated you can *step back*. This allows you to select a step which occurred earlier in the workflow for reprocessing. The workflow will return to the step you specify, then proceed from there.

1. Click the **`Step Back`** button in the top navigation bar.

2. In the resulting dialog, select the **`Previous Step`**; that is, the step to execute next - even though it is a step that occurs earlier in the workflow. A drop down list will show all appropriate destinations.



Note

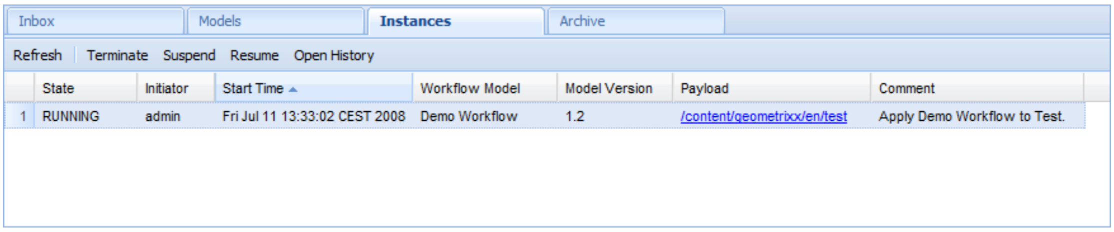
The number of previous steps available in the list depends on the design of the workflow.

3. Click **OK** to confirm the action.

7.5.4 Suspending, Resuming and Terminating a Workflow instance

Aside from workflow instances that require your immediate action and show up in your Workflow Inbox, you can perform certain other actions on running workflow instances.

1. Open the Workflow console.
2. Select the **Instances** tab. You will see a list of active (neither finished, nor terminated) workflow instances.



3. Select an entry.
4. To suspend the workflow, click the **Suspend** button in the navigation bar. The State will changed to **Suspended**. This can be helpful in exceptional cases when you do not want the workflow to proceed; for instance for maintenance.
5. While a workflow is suspended, you can then click **Resume**. This will restart the workflow from where it was suspended, with the same configuration. Again the **State** will be updated.
6. To finally terminate the workflow, click **Terminate**. This will immediately end the workflow execution - the state will change to **ABORTED**. A terminated workflow instance cannot be restarted.

The Instances tab is not only useful for taking action on running workflows, you can also use it to monitor workflow instances, without necessarily modifying them.

7.5.5 Monitoring the Status of Workflow Instances

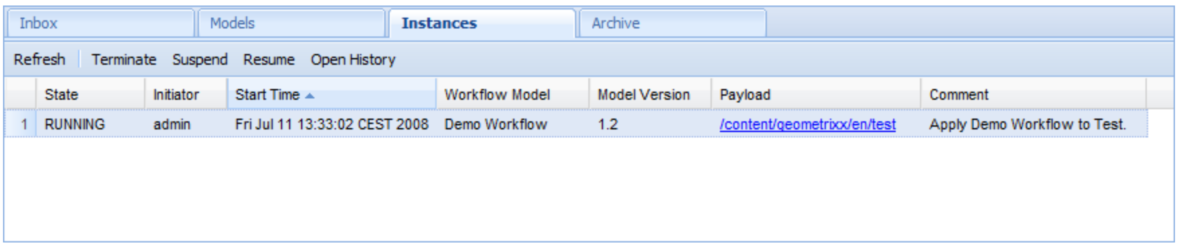
To monitor the status of workflow instances, you can use the **Instances** or **Archive** tabs.

Instances tab
: Shows all running instances.

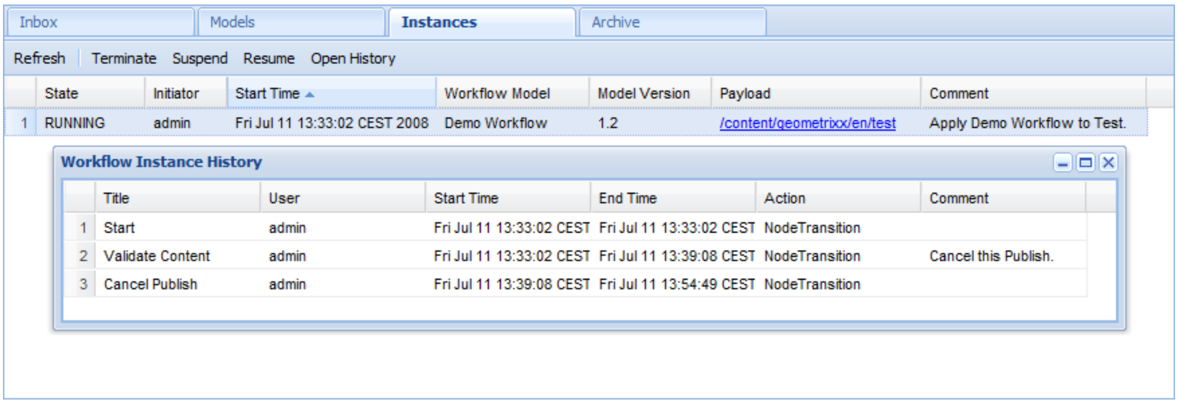
Archive tab
: Shows terminated workflow instances.

7.5.5.1 Monitoring Workflows in progress

From the **Instances** tab you can see the status of a Workflow in progress. A list of the active Models is shown; in this case **RUNNING**:

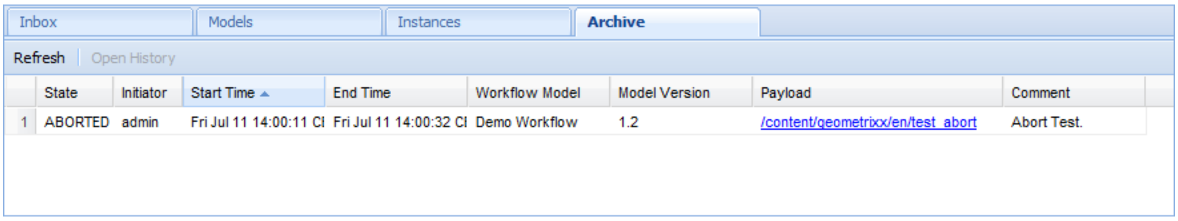


With the **Instances** tab you can take various actions (see Suspending, Resuming and Terminating a Workflow instance) and also **Open History** to show the actions executed to date on the workflow instance:



7.5.5.2 Archived Workflows

After a Workflow instance has finished, for whatever reason (terminated, as below, or after successful completion), it can (only) be seen in the **`Archive`** tab:



As the workflow has already completed, no further action can be taken on these instances.

However, if you need further details of a completed workflow you can still use **`Open History`**.

8 Tag Administration

8.1 Some basic facts about tagging in CQ

Tags are used to realize a quick and easy method of classifying content within your website:

- In technical terms a tag is a piece of metadata assigned to a content node (usually a page) within CQ5 WCM. You can also think of them as keywords or labels that you attach to page to help you find it again.
- Within CQ, tags can be grouped into various namespaces. Such hierarchies allow taxonomies to be built.
- There are no restrictions on the tags you can create - though they must be unique within a specific namespace.
- Tags can be created by either the page creator, or viewer. Irrespective of their creator, all forms of tags are made available for selection, both when assigning to a page, or when searching.
- As with pages you can perform the following on tags and namespaces:

  Activate
  : Activate individual tags.

  Activate Tree
  : Activate the selected tree.

  Deactivate
  : Deactivate the selected tags.

- Tags are used by the teaser component, which monitors a user's tag cloud to provide targeted content.

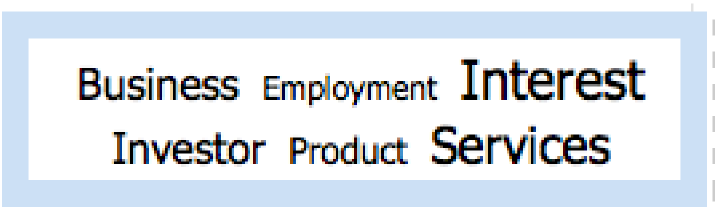
8.2 Tags - their strengths and weaknesses

A major strength of tags is their flexibility. No structure is needed (though namespaces do allow a minimal hierarchy). You can also assign them spontaneously, then search for them as required.

However, the flexibility can prove to be a disadvantage. It is all too easy to end up with many similar tags relating to basically the same thing; page and pages, impersonator and impersonators are two simple examples. For this reason, CQ allows you to see existing tags before you create a new one

8.3 Tag Clouds

Tag clouds show a “cloud” of tags, either for the current page, the entire website, or those most commonly accessed:



Initially a side product of tags, tag clouds are now a popular mechanism of highlighting the issues that are (have been) of interest to the user.

8.4 How to Manage Tags in CQ WCM

8.4.1 Using Sidekick to access and assign Tags

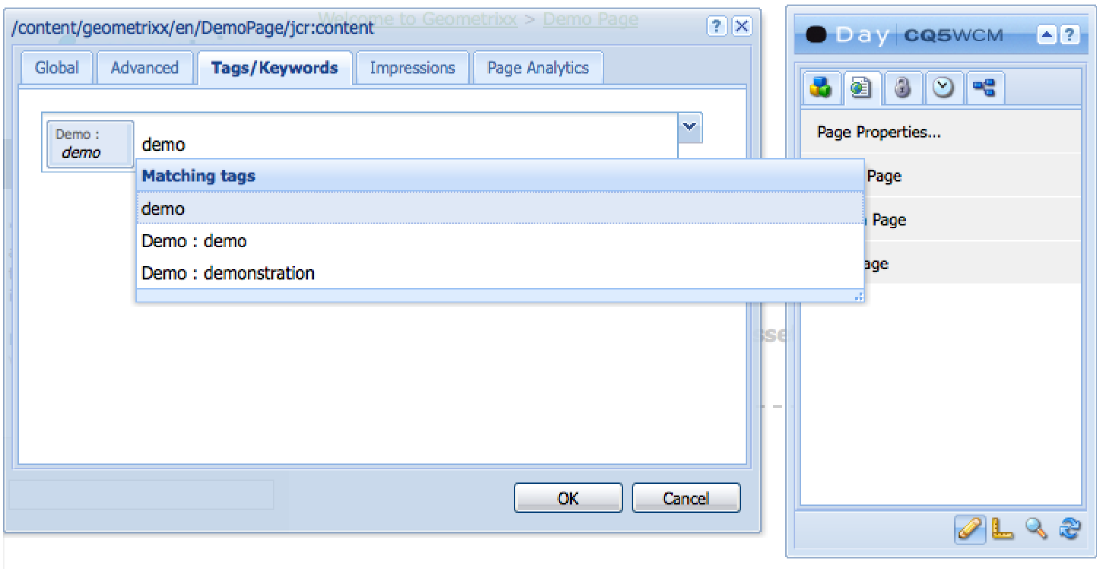
Many users will assign tags directly to the page they are editing. This can be done using the sidekick:

1. Within sidekick select the **Page** tab.

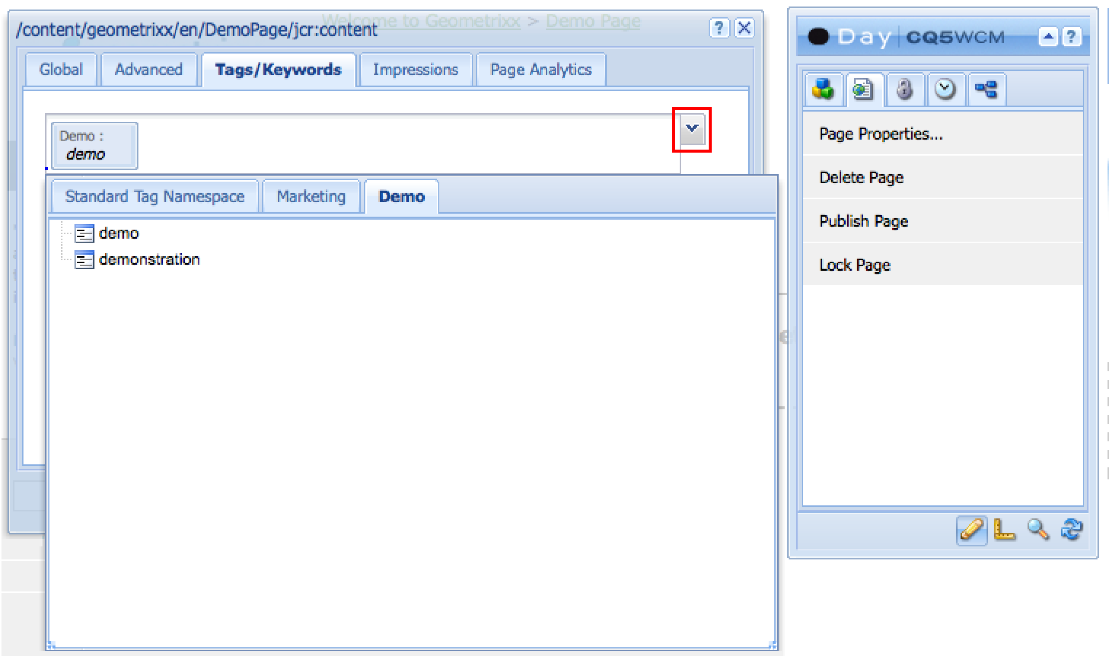
2. Open **Page Properties**.

3. Select the **Tags/Keywords** tab.

   Here you can either enter a tag by either typing a new name, or selecting an existing tag from the list of matching tags:



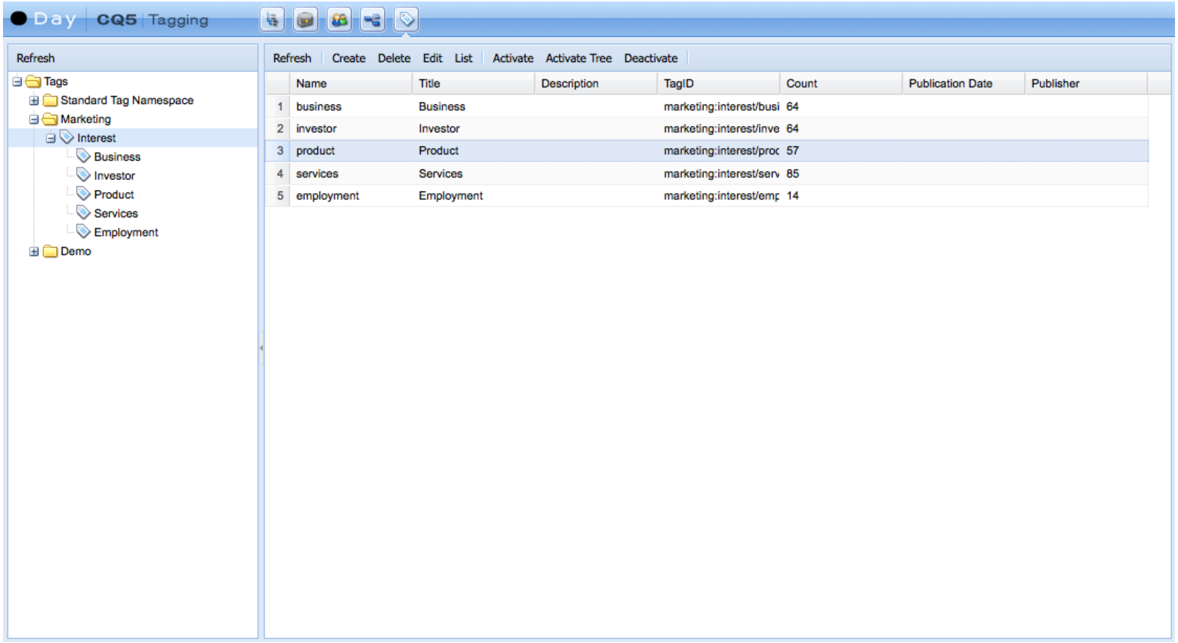
Or selecting a tag according to namespace, by using the drop-down option:



8.4.2 The Tag Administration Console

The Tag Administration console can be used to manage your tags and taxonomies.

It shows information about the tags already created for your website, and a count of how often they are referenced in the website:

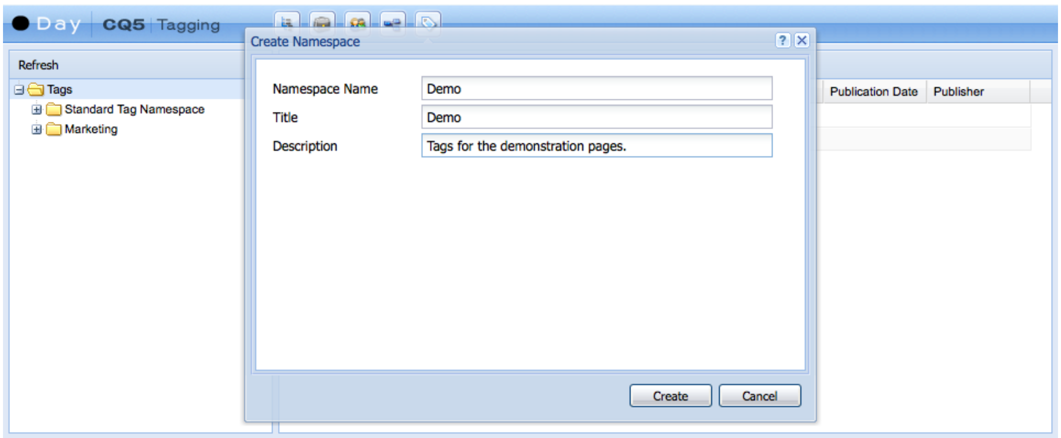


From here you can perform various actions on tags and/or namespaces.

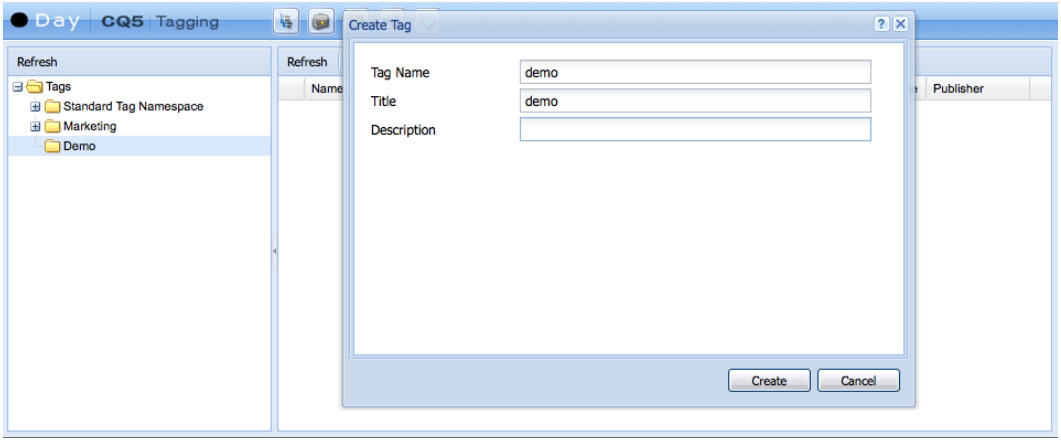
8.4.2.1 Creating or Editing Tags and Namespaces

1. Depending on the level you are starting from you can create either a tag or a namespace:

   a. If you select **Tags** you can create a namespace:



   b. If you select a namespace (for example **Demo**) you can create a tag within that namespace:



2. In both cases enter a name, title and description then click **`Create`**.

8.4.2.2 Deleting Tags

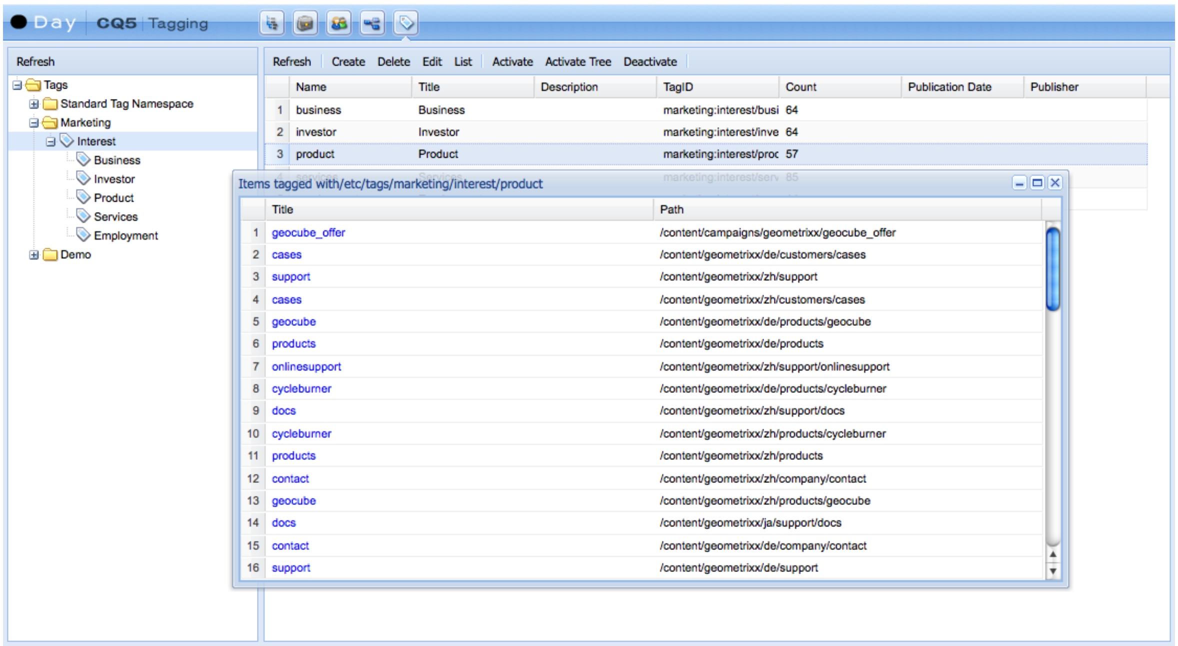
1. In the right-hand pane select the namespace or tag that you want to delete.
2. Click **`Delete`**.
3. You will be asked to confirm the delete action. Click **`Yes`** to delete the item.

8.4.2.3 Activating and Deactivating Tags

1. In the right-hand pane select the namespace or tag that you want to activate or deactivate.
2. Click **`Activate`**, **`Activate Tree`** or **`Deactivate`** as required.

8.4.2.4 List - showing where tags are referenced

`List` will open a new window showing the paths of all pages using the highlighted tag:

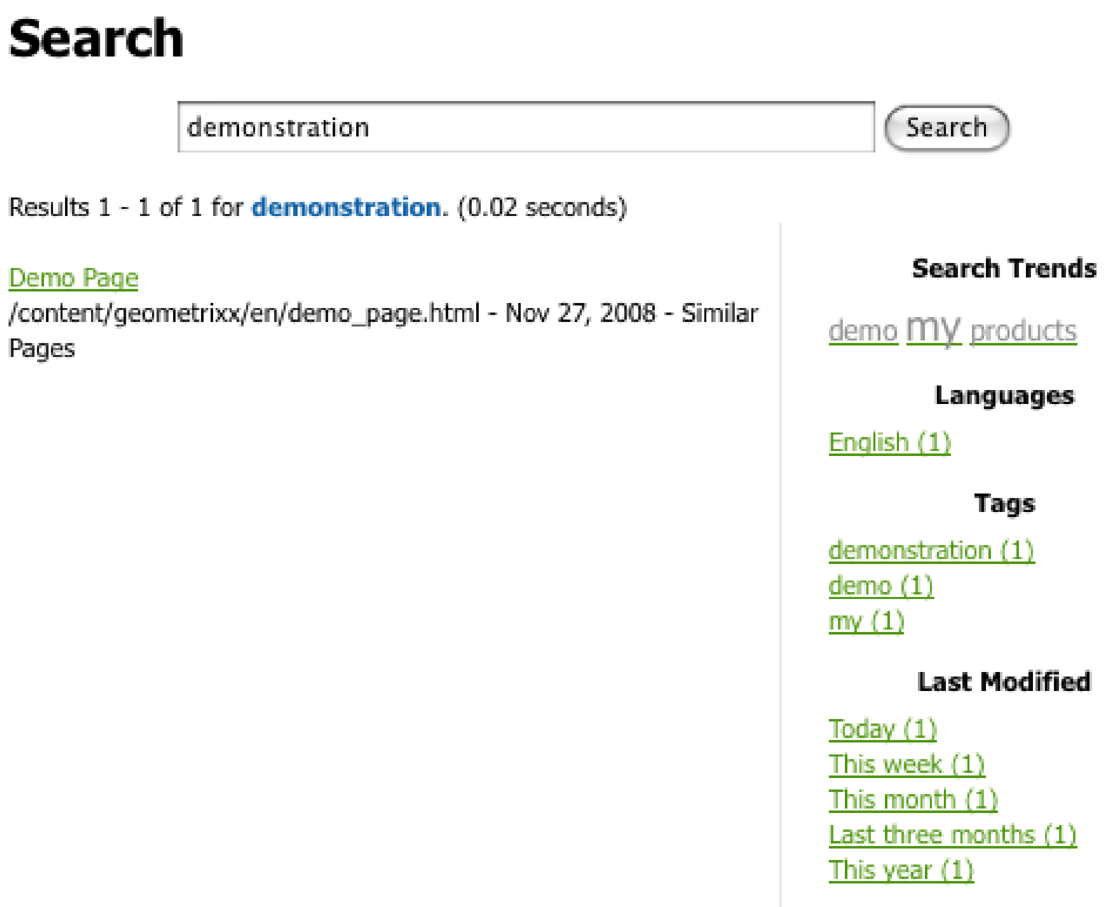


8.4.3 Searching for Tags

You can search for tags in both the author and publish environments.

8.4.3.1 Searching for tags with the Search component

The search component covers tags and can be used in both the author and publish environments.



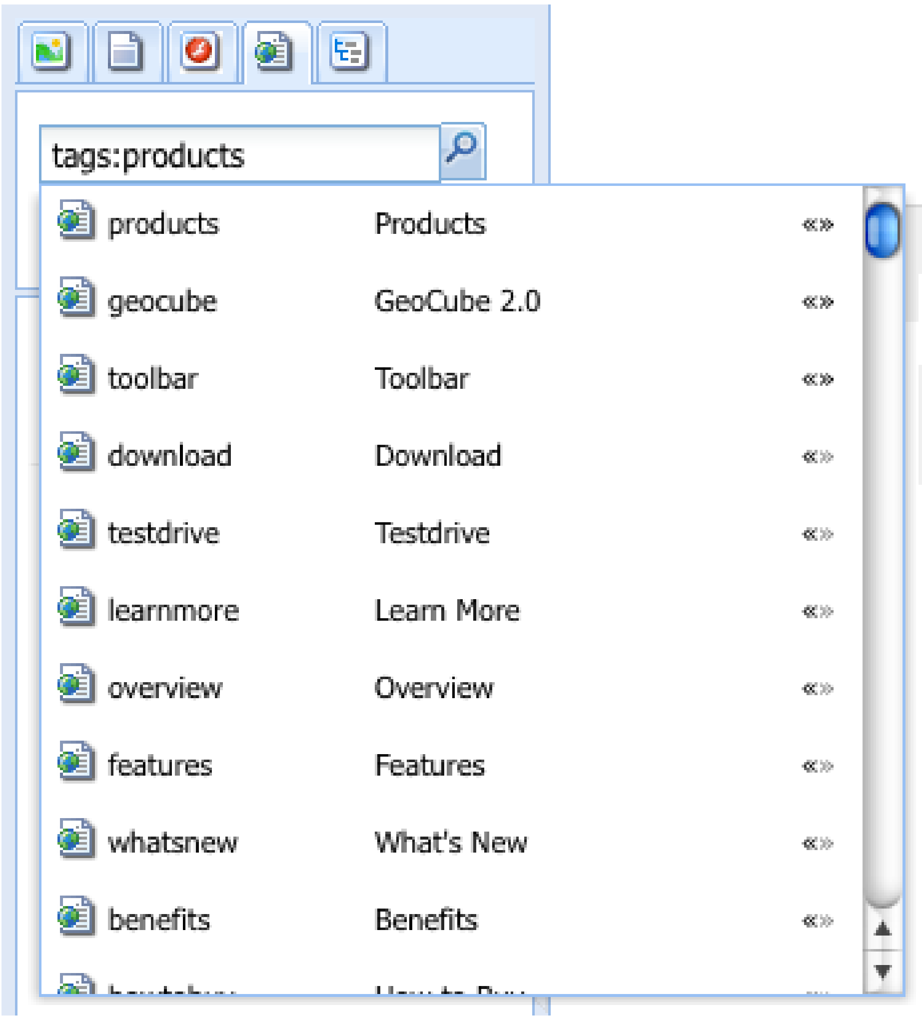
8.4.3.2 Searching for tags with the Content Finder

In the author environment you can use the content finder to search for tags:

1. Select the Pages tab in the content finder.

2. Enter the tag you want to search for.

   Using the prefix “**tags:**” will limit the search to tags only.


tags:products
products Products
geocube GeoCube 2.0
toolbar Toolbar
download Download
testdrive Testdrive
learnmore Learn More
overview Overview
features Features
whatsnew What's New
benefits Benefits

Appendix A. Keyboard Shortcuts

Table A.1. Keyboard Shortcuts

Location	Shortcut	Description
Page with a teaser component.	**`Ctrl-Alt-c`**	Shows the clickstream cloud: collection of page tags related to clicks that the user has made and used to focus the teaser.
Content Finder - Search box	**`down-arrow`**	Trigger a suggestions list. Needed when too few characters have been entered to trigger the list automatically (this happens when 2 or more characters have been entered).
	`right-arrow` (on a suggested path)	Select item and trigger suggestions for the selected path.
	`left-arrow` (on a suggested path)	Select item and trigger suggestions for its ancestors (as in siblings of parent).
	`Enter` (on a suggested path)	Select item and trigger search.
	`Esc`	Close suggestions layer.
Drag assets, drop on destination	**`Alt+drag`**	The drop action will produce a new paragraph; instead of replacing the asset in the destination.
Content Window (Edit Mode) - Paragraphs	**`Shift-Click`**	Select multiple paragraphs.
	`Ctrl-Click`	Select multiple paragraphs.
	`Ctrl-C`	Copy selected paragraph(s).
	`Ctrl-X`	Cut selected paragraph(s). **Note:** *The cut paragraph will not disappear until it has been pasted to the new location.*
	`Ctrl-V`	Paste paragraphs from clipboard.
	`Alt-Ctrl-V`	Paste as reference.
	`Del`	Delete selected paragraph(s).
	`Backspace`	Delete selected paragraph(s).
	`Alt-right-click`	Force default (brower) context menu.

Appendix B. Security Checklist

B.1 Security Checklist for Power Users

B.1.1 Change Default Passwords

Day strongly recommends that you change the passwords for the following two accounts:

1. Change the password for the **CQ5** `admin` account.

   Important

   To change the password for the CQ5 `admin` account, you need to change the admin password in **both** CRX and the OSGi Console. See the section called "Changing the admin account in the CRX console" and the section called "Changing the admin account in the OSGi Apache Felix console".

2. Change the password for the **CQSE** (Communiqué Servlet Engine) `admin` account.

   Important

   Further actions are described in the table the section called "Default Users and Groups", which gives an overview of the default users and groups included in the standard installation.

B.1.1.1 Changing the admin account in the CRX console

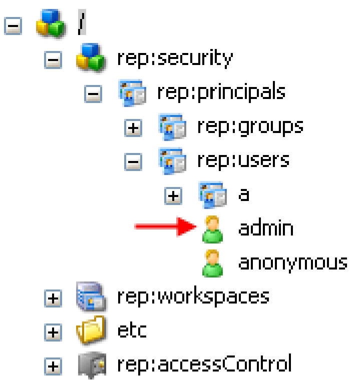
To change the `admin` account in the CRX console:

1. Log in to `http://<server>:<port_number>/crx` to open the CRX console.

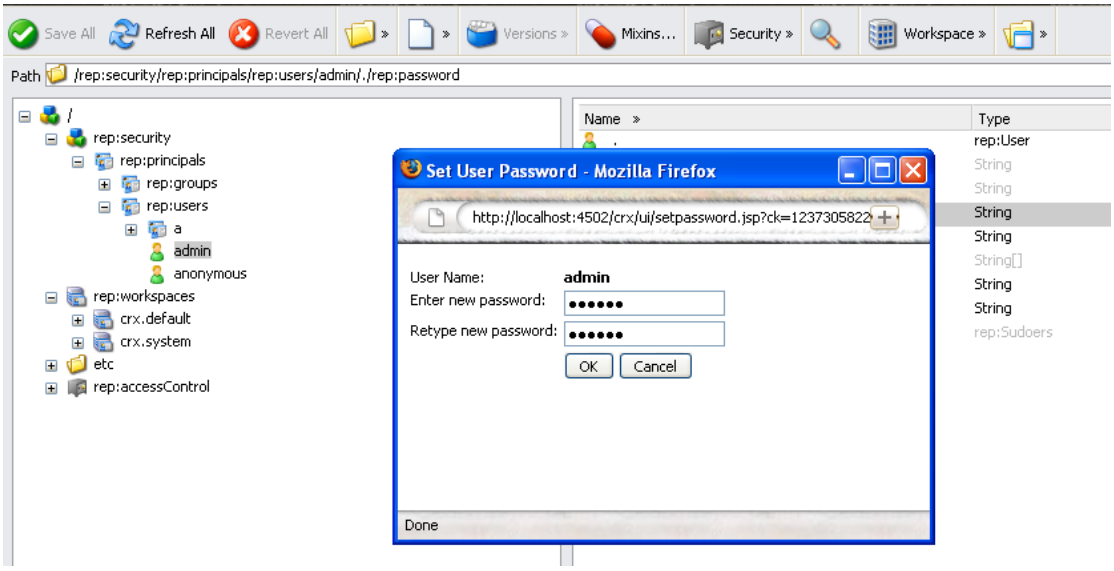
2. Log in as the administrator and switch to the `crx.system` workspace.

3. Open the Content Explorer and navigate to the `admin` user and select it.

4. In the **Security** menu, select **Set User Password**. A **Set User Password** window opens.



5. Enter the new password and re-enter to confirm and click **`OK`**.

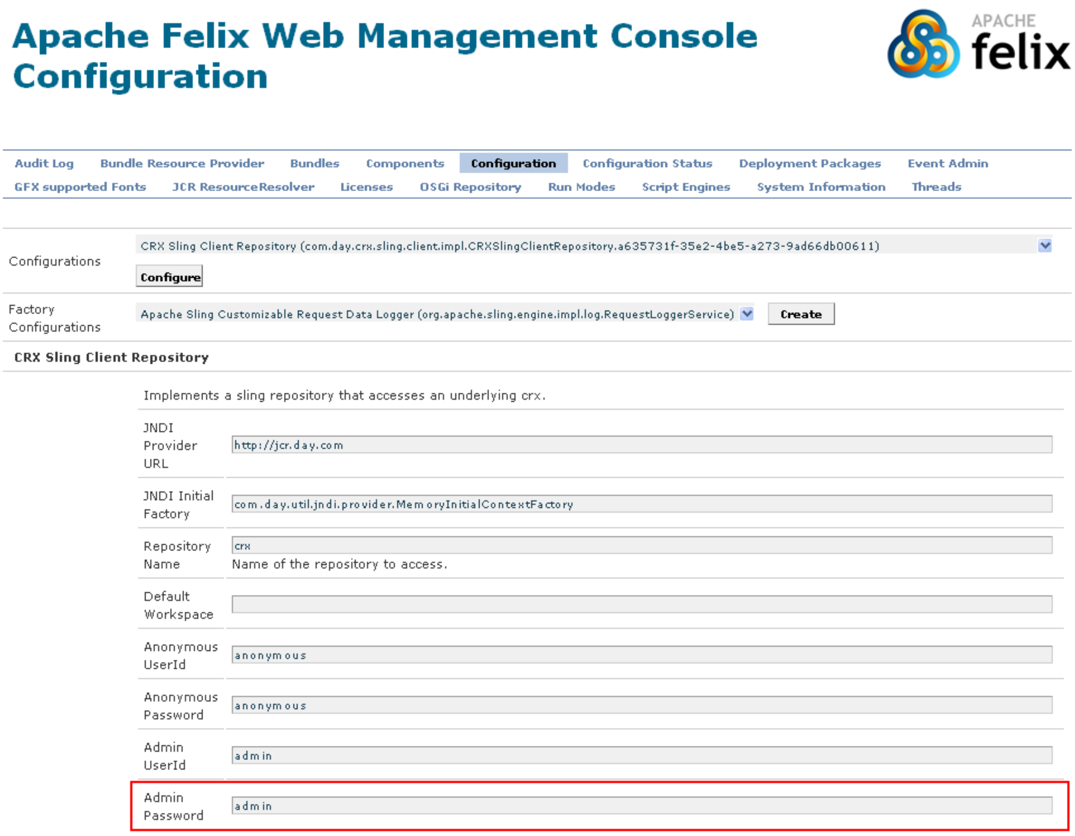
6. Save your changes.

B.1.1.2 Changing the admin account in the OSGi Apache Felix console

To change the admin account in the OSGi Apache Felix console:

1. Log in to `http://<server>:<port_number>/system/console/configMgr` to open configurations in the Apache Felix console.

2. In the **`Configurations`** menu, select **`CRX Sling Client Repository`**.



3. In the **`Admin`** password field, change the password to match the one you entered in the CRX console.

4. Click **`Save`** to save your changes.

Appendix C. Copyright, Licenses and Formatting Conventions

For all copyright statements and license agreements see Copyright, Licenses and Disclaimers.

C.1 Formatting Conventions

The following tables detail formatting conventions used within this guide:

Table C.1. Formatting Conventions - Text

Style	Description	Example
Cross-reference	Cross-reference to external documents.	See the *Microsoft Manual of Style for Technical Publications*.
GUI Item	User interface items.	Click **Save**.
Keyboard shortcut	Keyboard shortcuts.	Press **Ctrl+A**.
Mouse Button	Mouse buttons.	**Secondary-mouse** button (usually the **right-mouse** button).
Link	Link to anchor-points within the current document and/or external sources.	http://www.day.com
Code	Example of programming code.	if (weather == sunny) smile;
User Input	Example of text, or commands, that you type.	**ls *.xml**
<Variable User Input>	Example of variable text - you type the actual value needed.	ls *<cq-installation-dir>*
[Optional Parameter]	An optional parameter.	ls [*<option>*] [*<filename>*]
Computer Output	Logging and error messages.	ls: cannot access error.log:

Table C.2. Formatting Conventions - Actions

When you see this...	It means do this...
Ctrl+A	Hold down the **Ctrl** key, then press the **A** key.
Right-click	Press the **right-mouse** button (or the **left-mouse** button if your mouse has been configured for left-handed use).
Drag	Hold down the left mouse button while moving the item, then release the mouse button at the new location (or the right mouse button if your mouse has been configured for left-handed use).