Exosite

Boot Camp 2014

Subdomain and Client Model Labs

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Notes:

Lab 0 – Subdomain Home page

<yoursubdomain>.exosite.com/admin

1. When you go to your 'admin' area of your subdomain, the home page has some useful information.
2. Find the Vendor API Token – This is used for Vendor Fleet Management (Provisioning) API calls such as managing client models, posting content, etc.
3. What is your Vendor specific API Address? – This can be used by your devices to access Exosite's APIs (usually are at m2.exosite.com).

Lab 1 – Create a custom Domain Theme

<yoursubdomain>.exosite.com/admin/theme

1. Go to your admin area of your subdomain, on the left side menu, click 'Domain Setup' and underneath that, click 'Theme'.
2. You will not see anything listed in your Theme table at first. Let's create a new theme using the 'Add Theme' form.
   a. Theme Name: <whatever you want>
   b. Theme Description <whatever you want>
   c. Click Add.
3. You should now see your theme in the Theme List, you may need to do a page refresh. Click the 'Default' icon which should be red for your theme. It should go to green and now your subdomain is using this theme, which by default is just like the default Portals theme.
4. Click the edit icon (Pencil graphic) next to your theme to bring up the Theme Configuration box below.
5. Let's start by updating the **Header.**
6. Find the form item that says 'Logo image(300*82px)' and hit the 'Choose File' button. In your Labs code, find the 'subdomain_labs' folder, then the 'theme' folder and then find the image file called header_logo_image_300x82.png. Use this.
7. For the form item that says 'Background image(64*82px)', choose the file called 'header_background_image_64x82.png'.
8. Under the section called 'Browser Tab', Change the Browser Tab Text to whatever you want to call your subdomain (keep it short).
9. Under that same section, find 'Browser tab icon' and click 'Choose File' to upload the file called 'browser_tab_favicon_image_50x50.png'.
10. Scroll down and click 'Submit' to update your them.
11. Did you see these changes?
12. Change the Header text colors to make them show up more clear on a white background.
13. Change the Widget colors and other colors to match your company's color scheme.
14. Can you upload your own logo image for your company? It needs to be 300x82. Recommend using a transparent png so that the header background appears behind it.

Lab 2 - Custom CSS

With the custom themes, advanced HTML/CSS users can edit their custom CSS. Let's change the widget blocks to not have a border and change the title block.

1. Go to you Admin / Domain Setup / Theme page.
2. On the Theme List table, click the edit button next to your theme you want to edit, making sure it is selected as the default (green icon).
3. Go way to the bottom where you will see a box called 'User-defined CSS rules'. Fill in the following CSS code there and hit the 'Submit' button at the bottom.
4. Notice any differences?

```
div.block {
background-color: #F0F0F0;
border: 0px solid #e5e6e6;
padding: .5em;
}

div.block div.blockcontent div.content {
border: 0px solid #e5e6e6;
padding: 0 1em;
}

div.block .blockcontent .title {
background-color: #F7F7F7;
padding: 5px 5px;
text-align: left;
font-size: larger;
color: #888888;
font-weight: lighter;
}
```

Lab 3 – Create a Portal to keep dashboard and device clones
To create domain dashboard (custom pages) in Exosite Portals, it is a good idea to create a portal dedicated for this that the admins have access to for this purpose.

1. Click on the 'Portals' item in the Domain Admin Menu (left side) and then click 'Portal List'.
2. Add the top you should have a form called 'Add Portal'. We will use this to create this dedicated portal for domain admins.
3. Fill in the following:
    a. Portal Name: 'DOMAIN ADMIN'
    b. Portal Owner: <Pick yourself>
    c. Portal Plan: <You should have a plan call Domain Developer Plan with a balance of 1… these are included with a new subdomain>
    d. Portal Description: 'This portal is for domain admins to keep clone dashboards and clone devices'
    e. Click 'Add and Charge Domain'. (If you have a balance, this will subtract from that)
4. In the Portal List below, you should now have a portal called 'DOMAIN ADMIN'. Click this, which will take you to that Portal.

TIP:
If you need to invite others to help contribute to your subdomain (other admins), this is a good portal to invite them to as managers. Then on the Admin / Domain Setup / Admin Controls page you can add them as an admin to your subdomain.

TIP:
If you need to create other portals for development and testing, you can follow a similar approach, picking a plan (probably community for example).

Lab 4 – Create a default home page for your subdomain
By default, any portal created in your subdomain will use the Exosite generic default custom dashboard. Let's change that.

We will use the 'DOMAIN ADMIN' portal created in the last step.

1. In your 'DOMAIN ADMIN' portal, go to the Dashboards page (Menu on the left) and click '+Add Dashboard'.
    a. It's name should be 'HOME'
    b. fill in description, keep type custom.
2. Now go to that dashboard called 'HOME'. It should be blank.
3. Add a 'Text Box' widget and call it 'WELCOME'.
4. Use the following widget settings:
    a. Width 4, Height 2
    b. In the Message Settings box, put text "Welcome to the <your subdomain name> web portal".
    c. Hit the SUBMIT button.
5. You should now see this widget on your dashboard. This is a place holder really for now until you can put more time into making this page meet your application requirements. (Maybe a fancy device table with a ADD DEVICE button, etc)
6. Go back to the admin area now and under the Domain Admin menu on the left, under Domain Setup, you'll find a page call 'Domain Dashboards.
7. In the box at the top called 'Add Domain Dashboard', select your 'HOME' dashboard you just created, which should show up under your DOMAIN ADMIN portal.
8. Leave the type as 'Client Model' and click the 'Add' button.
9. You should now see your dashboard listed under the Domain Dashboard Listing table.
10. To apply this to new portals (new user sign-ups), go to your Domain Admin menu on the left, click 'Users' and then click the 'New Users' page.
11. Here, you can now select your domain dashboard as the default home page.
    a. Default Dashboard template: <Select your HOME dashboard under Domain Dashboards>
    b. Uncheck 'Create Default Device'
    c. Click 'Submit' button.

Now when a new portal is created, that portal's default home page will be this domain dashboard which you can update (that clone dashboard) and your changes will apply to all users. You will note that users won't be given the option to add widgets or change anything on that dashboard, as domain dashboards are not editable by users.
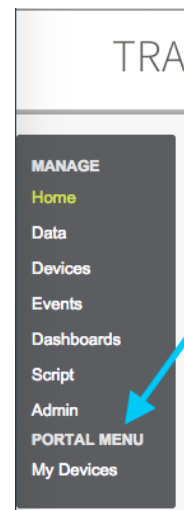
TIP:
Do not change which domain dashboard is used for this new user default dashboard setting or any updates you make won't be applied to older users.

Lab 5 – Create another domain dashboard and add it to the menu
Admins can create their own menu on the left which can call make calls to any
of the /manage pages, external links, or domain dashboards.

Let's create a menu item called 'My Devices'. We'll use the device table
widget developed in the Portals Labs.

1. In your 'DOMAIN ADMIN' portal, go to the Dashboards page (Menu on the
   left) and click '+Add Dashboard'.
     a. It's name should be 'DEVICE TABLE'
     b. Fill in the description, keep the type custom.
2. Now go to that dashboard called 'DEVICE TABLE'. It should be blank.
3. Add a 'custom widget' widget and call it 'DEVICES'.
4. Use the following widget settings:
     a. Width 4, Height 2
     b. Insert the custom code from the Portals Lab, the code can be found
        in the 'portals_labs' folder, called
        'device_table_using_portal_api_2.js'.
     c. Keep refresh rate at 0 and leave all the other widget settings as
        is.
     d. Hit the SAVE button.
5. You should now see this widget on your dashboard. You likely will not
   see anything listed since you probably do not have any devices in this
   portal yet.
6. Go back to the admin area now and under the Domain Admin menu on the
   left, under Domain Setup, you'll find a page call 'Domain Dashboards.
7. In the box at the top called 'Add Domain Dashboard', select your 'DEVICE
   TABLE' dashboard you just created, which should show up under your
   DOMAIN ADMIN portal.
8. Leave the type as 'Client Model' and click the 'Add' button.
9. You should now see your dashboard listed under the Domain Dashboard
   Listing table.
10. To make this page available in the menu, go to the Domain
    Admin menu and select 'Domain Setup', then
    'Configuration'.
11. Scroll down until you see the section 'Secondary Portal
    Menu'.
12. Click the 'Enable' button for the first item and enter a
    Display Name of 'My Devices'. In the next column, use the
    drop-down menu to select your 'DEVICE TABLE domain
    dashboard.
13. Scroll down a bit (not all the way to the bottom though)
    and click the 'Submit' button.
14. Go back to your Portal (you can click the top logo in the
    header) and you should see your new menu item on the left.

Lab 6 – Create a Client Model
This lab will follow the instructor, please wait for instruction.