

# ePortal CMS SERVER

## User Guide

Using  
Wisetek ePortal

**Wisetek Srl**

*v. 0.9 english*



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## CHAPTER 1

# **INTRODUCTION**

ePortal has been developed with the goal of being the most user friendly, dynamic and cost effective content management and portal server available today. Not only does ePortal give you the power to control content, ePortal also provides web applications and web services support only major companies and webmasters could manage or afford.

Consider the ePortal environment to be a virtual ecosystem influenced by you. You have the ability to develop your own tree of information blocks, choose the type of skins and layouts, create your cells with static and dynamic content, and share the data with whomever you wish to collaborate with.

In the early days of the ePortal concept, the instigators identified key trends companies are faced with. The resources associated with building a website, an intranet or an extranet and all the costs involved in maintaining it, makes it difficult for organizations to deploy a flexible solution.

ePortal improves user productivity by combining content management, lightweight document management and collaborative portal tools into one easy-to-use solution.

For the latest information on Wisetek Srl. products and authorized partners services, please visit us at: <http://www.wisetek.it>

Your feedback is welcome ! Your comments, questions and input will help us understand your needs and improve future versions of the ePortal technology.

Please send your feedback or questions in the public mailing lists. Check [www.jahia.org](http://www.jahia.org) to know more about it.

Many Thanks.

The Jahia Team. The Wisetek Team

## CHAPTER 2 **BUILDING YOUR FIRST ePortal SITE IN 5 MINUTES**

In this section, you will learn how to use ePortal to create a simple website. This will give you an overview of the features of ePortal.

### 2.1. PLANNING THE SITE ARCHITECTURE

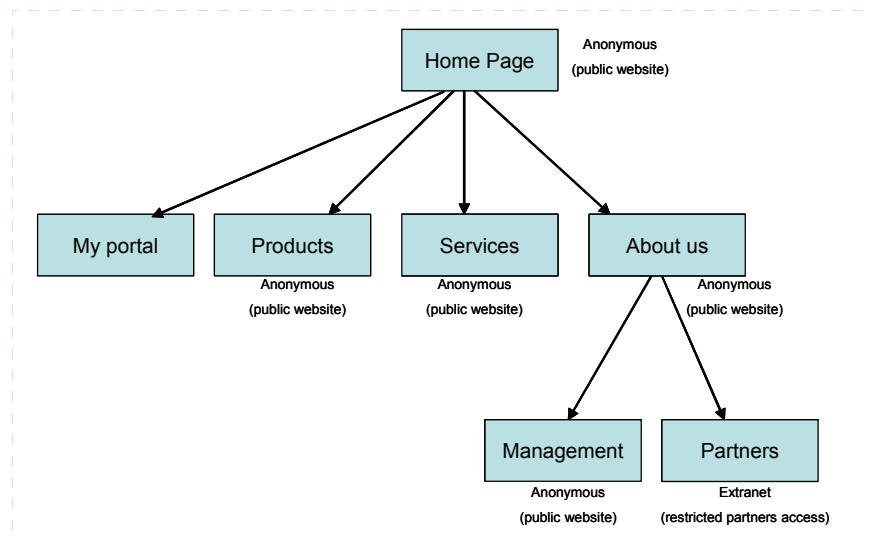
Before you start concretely building your portal or adding content, we recommend that you go through a first brainstorming phase. The ePortal technology has taken the complexity out of building a website, but it does not replace the elaboration of a well thought site architecture, as well as the definition of the various users' access rights.

#### *Create a logic - Structure your portal*

Thus before building your portal, make sure you have a logical organization in your head regarding your website. Which information do you plan to offer, who will use it, who will be in charge of updating it, under which section will the information be available?

You should start drawing a storyboard of your site. One common approach is to draw a tree of all your main pages and sub-pages with the different privileges. We are going to use the tree below for the current example:

Figure 2-1 : Website architecture



**NOTE:** We will only try to add the “About us” section in this short tutorial. You will learn how to modify permissions on a page in the next chapters of this guide.



## 2.2. CREATING YOUR FIRST SITE

### *Login to ePortal*

After you clicked on the Login button, type your username and password in the new window that appeared on your screen. Once you are logged in, you access the edit function of the site. Creation, modification and suppression tasks may now begin.

To access the edit functions, it is necessary to have a login and password and to have some adequate privileges (write permission) on certain parts of the site. If it is the first time you access ePortal, please use the login and password you chose during the installation process (cd. Administration Guide).

Figure 2-2 : Login window

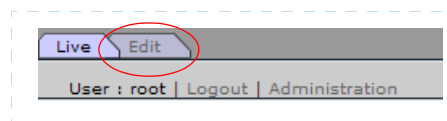


### *Mode Switching*

After the login, a new top bar is now available on your page. It allows the user to access confidential information or to switch to the Preview or to the Edit mode.

To enable any publishing on your website, you must click on the Edit Mode tab.

Figure 2-3 : TopBar



You will now see your current page in "Edit mode". Some icons are now displayed on the web page.

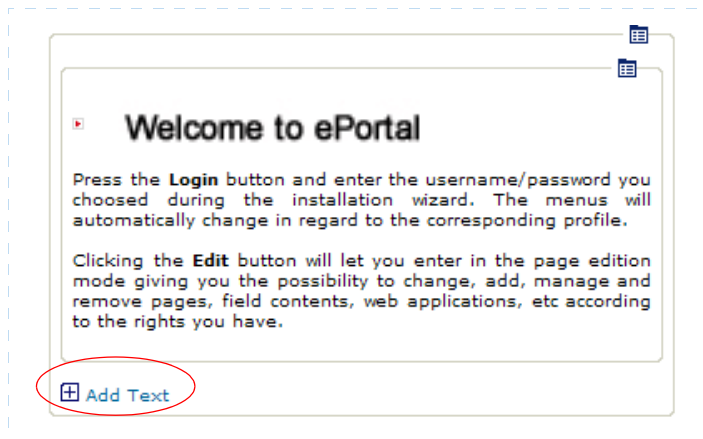
Basically, you are given access (provided that you have the correct permissions) to the functions enabling you to update elements, content and the structure of your site. You may now access features such as *add page*, *page properties*, *update* and *delete* directly from within your browser.

These are the tools that permit you to publish (add, edit or remove) your content. When you have finished, you can preview your changes in the Preview Mode. Once satisfied with your changes, you can approve them ("Workflow" button) so that they become available for any user who have the right permissions.

*Add a title*

Let's begin by adding a text on the Home page. Click on the "Add Text" icon.

**Figure 2-4 :** Add text on the homepage

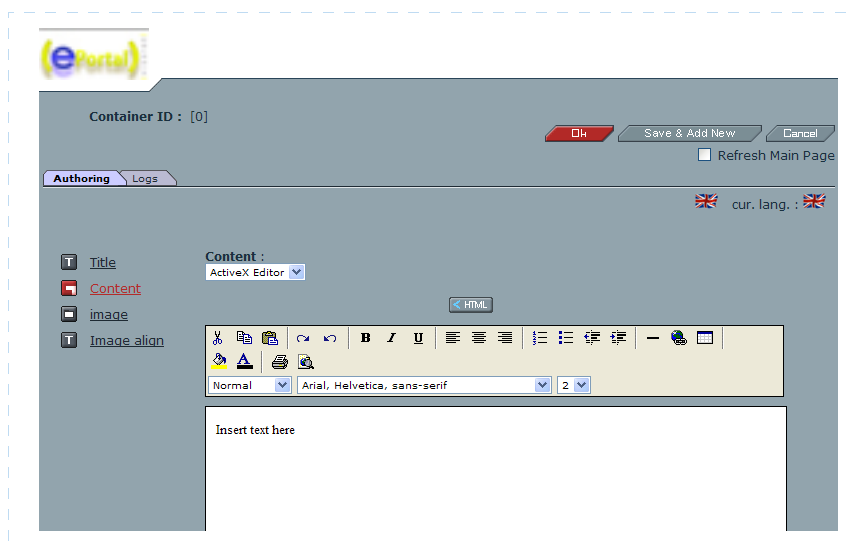


A new pop-up window will be launched. You may notice that this window will include several fields (right column) you may fill or not according to your needs. Fields may be of different types (small text; date; image; big text;...). An adequate editor will be displayed for all the different type of field to ease your content input.

For example to add the text you wish your users to read on the welcome page, simply click on the "Add Text" button and type the text you want into the area provided. You may notice that for large texts, several WYSIWYG HTML editors are provided (ActiveX editor under Internet Explorer, Java applet under Netscape,...). This will ease basic content formatting (bold, italic, underline,...) and also allows you to cut and past content from your favorite wordprocessing.

Once your content modifications are done, click on the OK button on top of the window. The pop-up window will close and the underlying page will be reloaded with your new changes.

**Figure 2-5 :** Add text

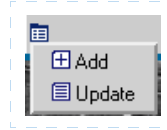


If you click on the Preview Tab in the top bar, you will see how your web site looks like without all the publishing icons. Then click on Edit Mode again to continue to modify your website.

### Add pages and sub-pages

Returning to our design, let's add a new page: "About us".

Figure 2-6 : Add page button



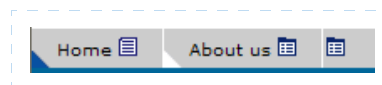
Simply click on "Add" icon in the top menu and the following pop-up screen will appear. Type the title of the new page: "About us" in the text field and choose the template "Simple". Then click on OK.

Figure 2-7 : Add page



You have just added a new sub-page in which you can now add all the elements that you need to further develop into this new section.

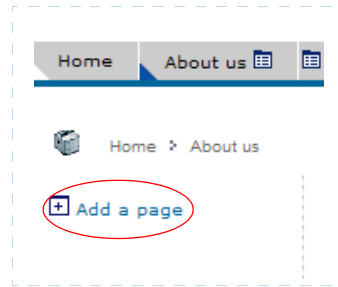
Figure 2-8 : New page added



Now, click on the new "About us" sub-page.

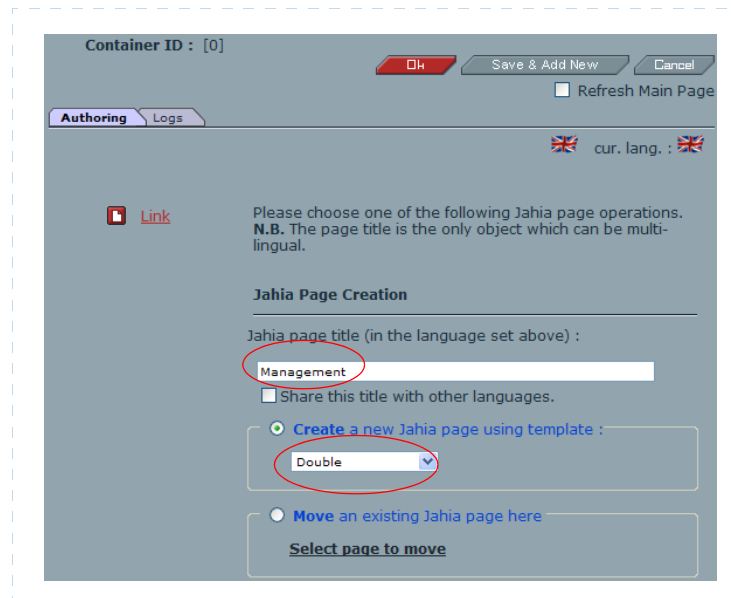
Take a moment and look at your tree. Under the About us element, you need to add a "Management" and "Partners" page. In order to do that, simply follow the same steps as you did when adding the About us element but in the left menu:

Figure 2-9 : Page "About us"



In the "About us" page, click on Add a page in the left menu. In the text field of the pop-up screen, enter "Management", and choose the template "Double" (2 columns). Then click OK.

Figure 2-10 : Add sub-page



"Management" is now a sub-page of the "About us" section. Repeat the same steps again for the Partners section.

Figure 2-11 : Sub-pages added

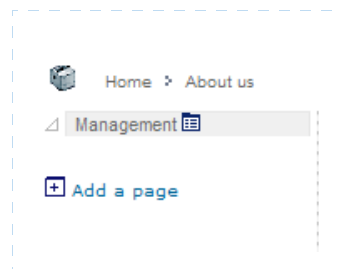


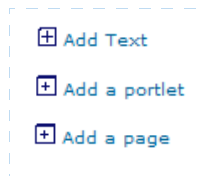
Figure 2-12 : Website architecture



### Entering some content

Now that the web site section is completed, you can begin entering your content. Go on the new "Management" page and enter some content by clicking on the following icons.

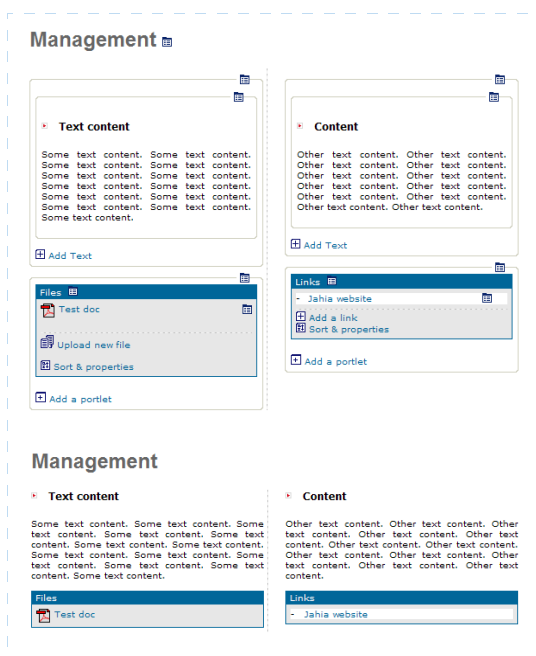
Figure 2-13 : Adding content



### Display pages in "Preview mode"

When you have finished your pages modifications, click on the Preview folder in the TopBar to see your updates and changes in "Preview mode" (without the edition icons).

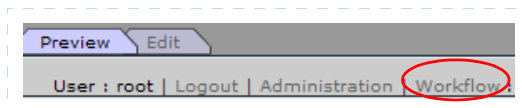
Figure 2-14 : Page in "Edit Mode" and "View mode"



### Validate modifications

If you are satisfied with the results, go to the home page and click on the Workflow button in the top bar.

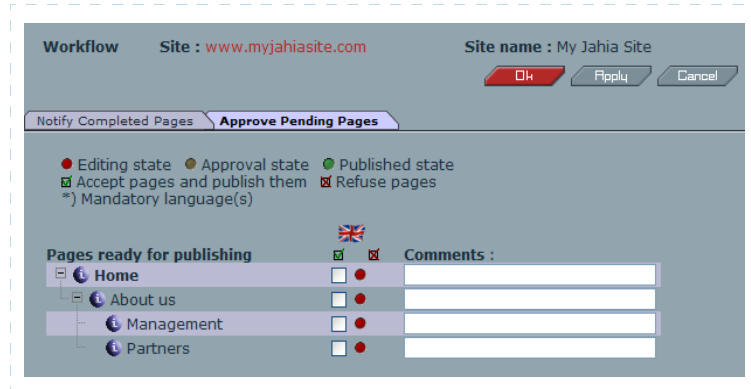
Figure 2-15 : Workflow button



You may now see that you have four pages that can be notified or validated. According to your permission (Author or Manager) you may either notify that content edition is done (Author), or directly validate it (Manager). If you have marked the pages as ready for approval, they will be locked (or blocked) to avoid any modification until a Manager validate it.

Let's say that you have sufficient privileges and that you can directly validate a page. Select all the pages you want to validate and click on the ok button so that they can be published.

Figure 2-16 : Workflow panel

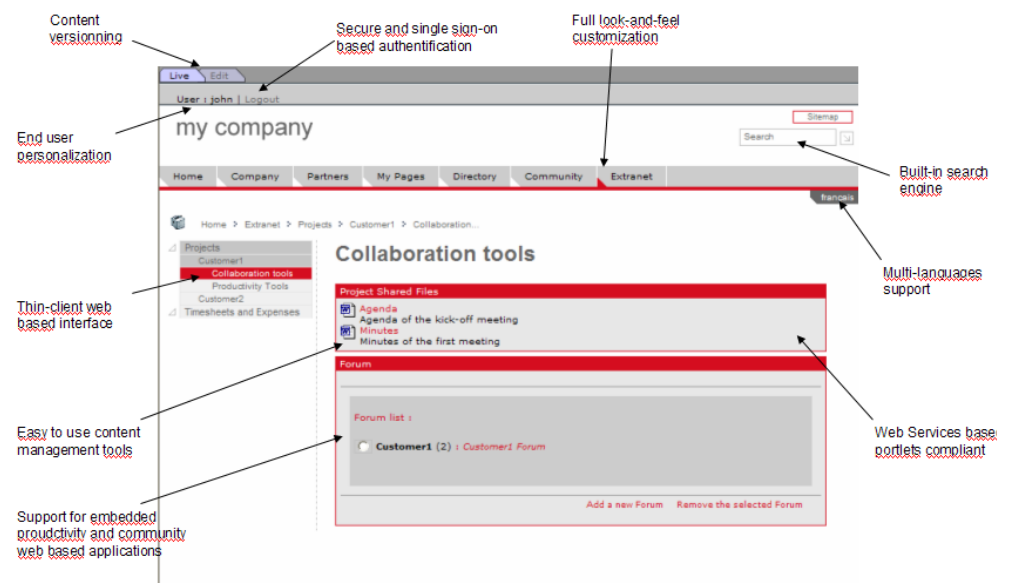


Congratulations ! You have completed a section of your website. You are now ready to add and publish additional elements at will.

## CHAPTER 3 **ePortal OVERVIEW**

### 3.1. ePortal CORE FEATURES

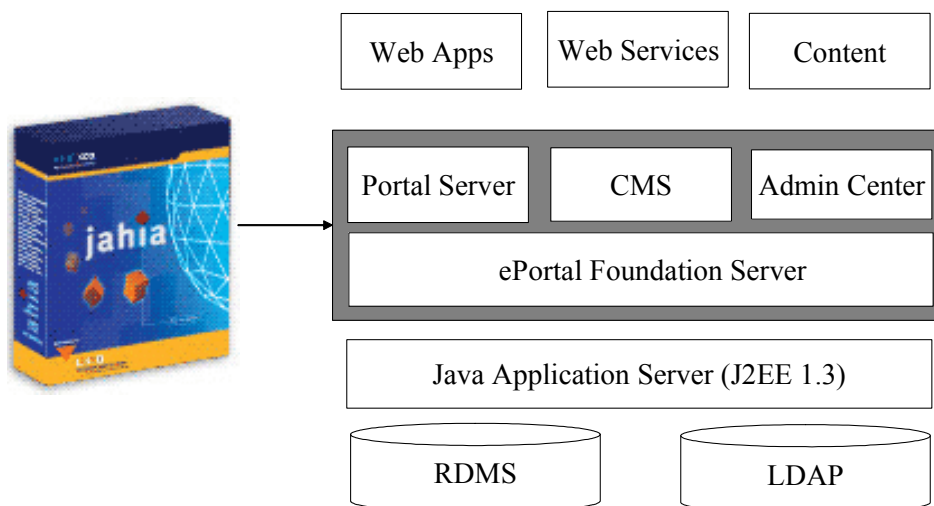
ePortal is a Web Content Management Server (Web CMS) natively integrated with a Corporate Portal framework (support for MyYahoo like portlets based web pages) and with a lightweight Document Management system.



The ePortal Server may be divided in three main modules:

1. The ePortal Foundation Server that handle all the back-end functions
2. The Portal Server that manages the interactions with the portlets (web applications and web services) and the end-user personalization tools (e.g. web interface to let the end-users organize their portlets)
3. The CMS Server that deals with all the management of structured or unstructured content of your site and that manages the site navigation and structure.

ePortal relies on a standard server-side Java based architecture. But as an end-user, you do not need to know anything about technology as all the ePortal operations will be done from within your thin client web browser. ePortal is not browser specific and any browser may be used. According to the features your template developer has integrated, certain limits may occur. This is not due to ePortal but to your specific set of templates. Please check with your template developer in case of problems.



Thanks to the native integration of CMS and a Portal features, ePortal may be used as a tool to manage your public web site or as a collaborative intranet/ extranet web space. You can even mix on the same web page, content (a text) and portlets (a discussion forum) as everything relies on a common and integrated platform.

### 3.2. KEY ePortal FEATURES

ePortal provides the following key features to power your new portal or web site:

- Easy to Use Content Edition with support for various WYSIWYG HTML Editors
- Based on templates to clearly separate layout and content
- Full Multilanguage and Internationalization support
- Advanced Security Management
- Content Versioning
- Page Approval Workflow
- Native support for Portlets (Web Applications and Web Services)
- Virtual Site Management
- Integrated Search Engine
- Lightweight Document Management System
- Full web based Administration Center

And many more functions. Check the [www.wisetek.it](http://www.wisetek.it) web site to know all the last new features provided by the ePortal software.



### 3.3. DEFINITION OF USER ROLES IN ePortal

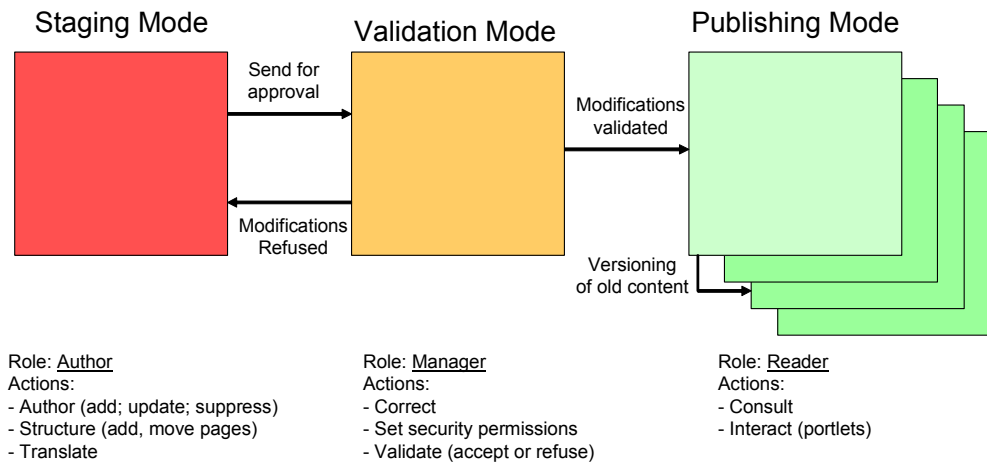
To better understand ePortal, when you can use certain features and who is able to access them, we will have to distinguish various user roles. These roles may be cumulated and a same user may access to all the functions simultaneously. These roles may also be different in the various sections of your site. So as a Jahia user you can act as a Content Manager on certain pages but only as a Reader on others.

- **Guest (anonymous):** This "user" is provided by default on all the ePortal installation. It allows non authorized users (anonymous user) to access part or all of your web site. When you published an Internet based web site, unregistered external users will be tacitly logged into the system with this profile.
- **Reader:** the Readers are registered ePortal users who can login into the system. Thanks to their authentication, they may access private areas (intranet or extranet areas) and also to their personalized settings (their personal information such as their e-mail address, their languages preferences,...). A reader has "read-only" privileges and can not switch in edit mode to modify content.
- **Author:** The Authors, unlike the Readers, may modify the site content. They may access all the functions related to the edition and modifications of part or all of the web site. So an Author may be a Portal User that needs to edit some portlets and content on his personal home page. It may also be a Redactor or a Translator in charge of editing complete sections of the web site.
- **Manager:** The Managers approve content modifications before it goes live. They can also modify the permission rights (who can access to which section or which content object) or to the activity logs. They have the same privileges as the Authors regarding content modifications. You can be a Manager on some pages and only an Author or a simple Reader on another section of the portal.
- **Site Administrator:** On the same ePortal server, you can host several independent web sites (e.g. one for each department). Each web site has one or several Site Administrators that can access to the Site Administration Center interface. The Administration Center lets the Site Administrators manage the global settings of the current web site such as registering new users and groups, adding new templates or setting the site languages or the default home page for each users. Every Site Administrator has full access will all privileges on its virtual web site, and several Site Administrators can be set up for each virtual site.
- **SuperAdministrator/ Root:** Each physical ePortal Server has a Root user (System Administrator). This user can access to all the virtual web sites with all privileges and can also access to the low-level menus in the Administration Center (database settings; backup services;...).

The functions available for the Site Administrator and the Root roles will not be explained in this document. Please check the ePortal Administration Guide to know more about these roles.

### 3.4. THE ePortal PUBLISHING PROCESS

The second important point to keep in mind while using ePortal is the basic flow of information.



The usual flow is defined in the following manner:

1. One or several authors enter or modify content. Once the modifications or translations are done (e.g. the creation of a new Marketing section), they send a request for approval to a Manager.
2. A Manager is then in charge of reviewing the changes, modifying if necessary the permission rights and validating the content before publishing.
3. Once approved, the new content is then available to the Readers. A version of the previous content is automatically stored in the system as an archive (versioning).

This is the usual flow of information in ePortal. However it is also possible to have web sites without any validation step (the content is then immediately published to the users - useful for intranet and collaboration web space purposes for example) or without versioning (no archiving of previous content). It is also possible to integrate ePortal with third party tools such as a more complete workflow server that will require you to follow a complete validation path with several approvals steps before the content goes live.

---

## CHAPTER 4 **NAVIGATING THE LIVE PUBLISHED WEB SITE**

*Now that you know what ePortal is, that you identified the various user roles and that you understood the basic information flow, let's begin to see which functions are available for an anonymous or an identified reader.*

### 4.1. ePortal MENUS AND NAVIGATING PATHS

ePortal automatically maintains the menus and various navigation paths in a coherent state according to your permission rights, so it is not possible for you to access pages on which you don't have the adequate rights. These pages are then automatically removed from the menus displayed online.

The best way to illustrate the ePortal navigation mechanism is to access a web site with an anonymous login (default) and to check the menu. Now log into the system. You may access to new pages that were not visible before (e.g. an Intranet and/or an Extranet section).

So each identified user may see a "different" site with different set of pages and content according to his own personal privileges. This principle is called "dynamic content aggregation" and is the base of any Content Management System. ePortal will dynamically create the web pages you can see according to your specific permission rights.

ePortal mainly offers two navigation systems:

- Menus
- Paths

The web designer of your web site may have created some particular menu systems for your particular web environment. For example Floating Menus (inside portlets you can move yourself), Tabs or Drop-Down DHTML Menu. Basically the system is the same and will let you access various different web pages of the site on which you have the adequate rights.

### 4.2. SITEMAP

The Sitemap displays the pages titles and the relations between the pages. A ePortal web site is basically a tree starting from the trunk (the home page) and going to the leaves.

Similar to the navigation menu mechanisms, the sitemap is dynamically adjusted to your rights and permissions. You can for example see more pages on your sitemap page if you are logged into the system.

## 4.3. LANGUAGE SWITCHING

A ePortal web site may be available in several languages. If you have no particular settings (you browse the site as an anonymous user) ePortal automatically detects the languages of your browser and will try to display the page you want to access in this language (if such language exists in the ePortal system of course) else the default site language will be displayed.

Usually if the site is available in multiple languages, the web designer will display somewhere a menu to let you switch among the other available languages. This may be a menu in text mode or with icons such as flags. Once you switch to another language, the ePortal system will let you browse the site in this new language until you decide to change language back again. You can switch from a language to another on any page.

### 4.3.1 Mandatory and optional languages

ePortal also manages mandatory and optional languages. All the content will be available in all the mandatory languages as ePortal will check their completion during the approval process before such content goes live. However a site may only be partially translated. In other words, it means that certain pages will only be available in a certain language. To display them in the menus, you will then need to switch to this specific language.

### 4.3.2 Languages mixing setting

Another setting the Site Administrator may customize is the "language mixing" option. In this case, if some content is not translated, it will still be displayed on the page but in another language (so a page may contain content or sub web pages available in multiple languages). The Administrator may define the default order of languages preference for the whole site (e.g. 1) English, 2) French, 3) Spanish). During the dynamic aggregation process of a web page, if the content is not available in English, ePortal will then automatically try to display it in Italian and, if not available, in Spanish.

This is also valid for menus. If some web pages only exist in another language, they will be displayed untranslated in the navigation menus.

This system is quite useful for Intranet based web systems where various subsidiaries are working simultaneously in various languages. The goal is then to display as much information as possible to all the employees and not to try to filter information according to the current selected language to keep an homogenous well translated web site.

## 4.4. SEARCH ENGINE

This function performs a search on the whole content of the site (full text search). Here is a summary of the syntax that can be used when performing a search:

### *Boolean operations:*

Boolean operators allow terms to be combined through logic operators. The search engine supports AND, "+", OR, NOT and "-" as Boolean operators (Note: Boolean operators must be ALL CAPS).

### *OR Operator*

The OR operator is the default conjunction operator. This means that if there is no Boolean operator between two terms, the OR operator is used. The OR operator links two terms and finds a matching document if either one of the terms exists in a document. This is equivalent to a union using sets. The symbol || can be used in place of the word OR.

To search for documents that contain either "CMS" or "Portal" use the query:

**CMS Portal**

or

**CMS OR Portal**

### *AND Operator*

The AND operator matches documents where both terms exist anywhere in the text of a single document. This is equivalent to an intersection using sets. The symbol && can be used in place of the word AND.

To search for documents that contain "ePortal portal" and "ePortal" use the query:

**"ePortal portal" AND "ePortal"**

### *"+" Operator*

The "+" or required operator requires that the term after the "+" symbol exist somewhere in a field of a single document.

To search for documents that must contain "ePortal" and may contain "CMS" use the query:

**+ePortal CMS**

### *NOT Operator*

The NOT operator excludes documents that contain the term after NOT. This is equivalent to a difference using sets. The symbol ! can be used in place of the word NOT.

To search for documents that contain "ePortal CMS" but not "ePortal Portal" use the query:

**"ePortal CMS" NOT "ePortal Portal"**

Note: The NOT operator cannot be used with just one term. For example, the following search will return no results:

**NOT "ePortal CMS"**

### *"-" Operator*

The "-" or prohibit operator excludes documents that contain the term after the "-" symbol.

To search for documents that contain "ePortal CMS" but not "ePortal Portal" use the query:

**"ePortal CMS" -"ePortal Portal"**

### *Wildcards*

The search engine supports single and multiple character wildcard searches.

- To perform a single character wildcard search, use the "?" symbol.
- To perform a multiple character wildcard search, use the "\*" symbol.

The single character wildcard search looks for terms that match those with the single character replaced.

For example, to search for "text" or "test" you can use the search:

**te?t**

Multiple character wildcard searches look for 0 or more characters. For example, to search for test, tests or tester, you can use the search:

**test\***

You can also use the wildcard searches in the middle of a term.

**te\*t**

### *Grouping*

The search engine supports using parentheses to group clauses to form sub queries. This can be very useful if you want to control the boolean logic for a query.

To search for either "ePortal" or "cms" and "website" use the query:

**(ePortal OR cms) AND website**

This eliminates any confusion and makes sure that the term "website" must exist and that either the term "ePortal" or "cms" may exist.

### *Fuzzy search*

The search engine supports fuzzy searches based on the Levenshtein Distance, or Edit Distance algorithm. To do a fuzzy search use the tilde, "~", symbol at the end of a Single word Term.

For example to search for a term similar in spelling to "roam" use the fuzzy search:

**roam~**

This search will find terms like foam and roams

Note: Terms found by the fuzzy search will automatically get a boost factor of 0.2

### *Proximity search*

The search engine supports finding words which are a within a specific distance away. To do a proximity search use the tilde, "~", symbol at the end of a Phrase.

For example to search the terms "ePortal" and "cms" within 10 words of each other in a document, use the following search:

**"ePortal cms"~10**

### *Boosting a term*

The search engine provides the relevance level of matching documents based on the terms found. To boost a term use the caret, "^", symbol with a boost factor (a number) at the end of the term you are searching. The higher the boost factor, the more relevant the term will be.

Boosting allows you to control the relevance of a document by boosting its term. For example, if you are searching for:

**ePortal cms**

and you want the term "ePortal" to be more relevant boost it using the ^ symbol along with the boost factor next to the term. You would type:

**ePortal^4 cms**

this will make documents with the term ePortal appear more relevant. You can also boost Phrase Terms as in the example:

**"ePortal cms"^4 "ePortal portal"**

By default, the boost factor is 1. Although, the boost factor must be positive, it can be less than 1 (i.e. 0.2)

### *Escaping certain characters*

The search engine supports escaping special characters that are part of the query syntax. The current special characters are

**+ - && || ! ( ) { } [ ] ^ " ~ \* ? : \**

To escape these character use the \ before the character. For example to search for (1+1):2 use the query:

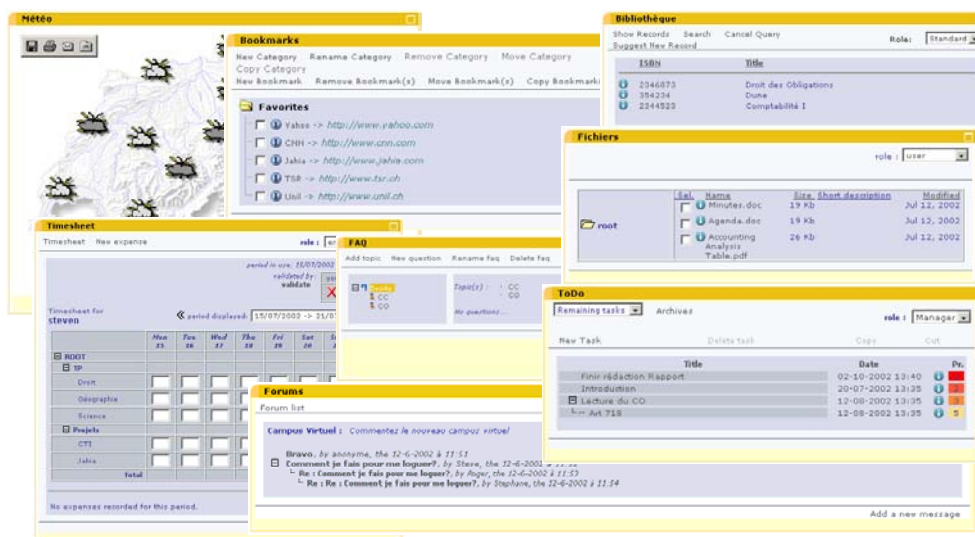
**\(1+1)\:2**

**Warning:** If the portlets have not been pre-integrated with the search engine (this is for example the case with the default web applications pre-packaged with ePortal), their content will not be indexed and can not be retrieved in the global search engine. You may however have dedicated search engine embedded in each portlet.

**NOTE:** The ePortal search engine is provided with a PDF and a MS Word plug-in to index the content of such binary documents. Problems may occur with the indexing of certain Word documents due to the poor Word file format. In such cases, please use the "Save As" command in your Microsoft Word to save your content into a new file and simply upload this new file into ePortal. The content shall be now correctly indexed by the ePortal search engine.

## 4.5. USING PORTLETS

As mentioned above, ePortal can mix static content with dynamic portlets based areas on the same web page. Portlets are web based applications or web services you may access directly from within your portal without having to access to another web site or to open a new browser.



Usually portlets are developed to automatically recognize your session. So if you are already logged into ePortal, the portlet will automatically display different menus according to your profile. Each Portlet may have different roles according to the available functions. Check on the related portlet documentation to know more about how to use each web application.

## 4.6. DIFFERENT ACCESS RIGHTS

As we saw above in the menus or in the Sitemap sections, each ePortal element (generic elements are usually called a Content Object in ePortal as it may be a web page, a field, a group of fields or a portlet) may have different permission rights for each user or group.

Basically ePortal permissions are the following:

- Read: Read only permission. The object is only visible for this user (or group).
- Write: The user (group) may edit the content of this object or add new sub-objects. Write permission automatically grants you the Read permission.
- Admin: The admin permission allows you to validate the modifications and to modify the security permissions on this object of content. For ease of use reasons, validation is done on a per page basis even if the back-end system is able to manage a validation per field.

Each object of content in ePortal automatically inherits of these rights. You may have all permissions (R, W, A), partial permissions (R, W) or no permissions at all. This is why you may see additional information if you are logged in the system rather than in an anonymous mode.



### Creating Intranets and Extranets with a few clicks

The management of these security permissions lets you easily create Extranets for partners and customers or Intranets for employees. Just restrict the access of certain sections to certain users and groups. That's it. Your new intranet or extranet section is created and only authorized users will now be able to access the newly restricted area.

**Hint:** Regarding the overall security management of the site, we highly recommend that you only work with Groups (e.g. Employees, Customers, Partners,...) and not with users. It will ease the maintenance of your web site on a long term basis (for example if a user leaves your organization, it will be more easy to remove him from a group rather than from several web pages spread out on your whole web site).

You may read additional information on this topic in the "Managing the Access Rights" section later in this document.

## 4.7. LOGIN INTO ePortal

To log into ePortal, just click on the login link or icon. You will then see the following screen.

Figure 4-1 : Login screen



Just enter your login ID and password. You are now logged into the system.

## 4.8. ePortal TOPBAR FOR AUTHORIZED USERS

As soon as you are identified by the system, ePortal will display a new top bar Menu. This top bar may be customized for each particular web site but looks like the screenshots below in the default ePortal template :

Figure 4-2 : ePortal top bar - Read Permission

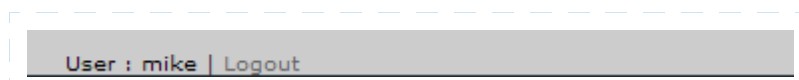


Figure 4-3 : ePortal top bar - Write Permission

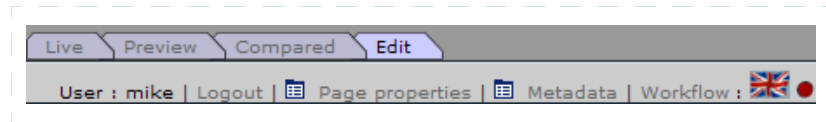
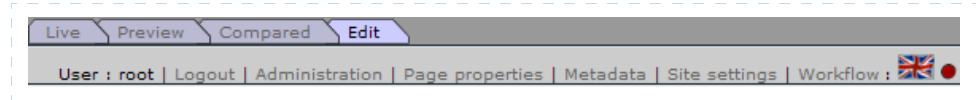


Figure 4-4 : ePortal top bar for Site Administrator



You may now access to several new information and functions:

- Your ID so that you know which user is currently active (for example if you have several logins)

If you have only Read permission, you will not be able to access these features (Author and Manager only):

- The tabulations to switch to another Mode (Preview, Compared or Edit).
- A list of all the available languages
- The Workflow icon
- The Administration Center Menu (only for Site Administrators).

That will allow you to modify content or access the administration menus. Check next chapter to know more about all these functions.

## 4.9. MY HOME PAGES

The Administrators may customize for you a default home page and some default group pages (automatic url redirects) while registering your account.

You have two ways to access your default page:

1. When you log into the system, you can choose to be automatically redirect to your home page
2. Once logged, you can always access your default page by using the shortcut available in the top bar.

## CHAPTER 5 **USING THE PREVIEW AND COMPARED MODES**

*This chapter describes the Preview and Compared Modes. These modes are only available to people with a Write (Author) or Admin (Manager) permission on a full page or at least one content object on the current page.*

### 5.1. PAGE PREVIEW

The main difference between the Live and the Preview or Compared mode is that you will be able to preview the content under modification or waiting for an approval as it will appear once validated on the live published web site.

The Preview Mode provides an exact view of the page as it will be once validated. The compared mode provides visual content highlighting to help you review the modifications between the live and the preview modes.

### 5.2. STATUS OF A ePortal PAGE

You can immediately check the status of the current page thanks to the Page Color Status Button (next to the flag of the language in the topbar) :

Figure 5-1 : Page status



- Green: The page in Preview or Compared mode is the same as the one in Published Mode. No modifications have been done from the last validation.
- Orange: The page is under validation. Modifications have been done and the page is now waiting for an approval. Only a Manager may now validate (or refuse) the modifications and publish content. The page is locked until validated.
- Red: The page is currently under modification. This is a work in progress and every Author may still modify content.

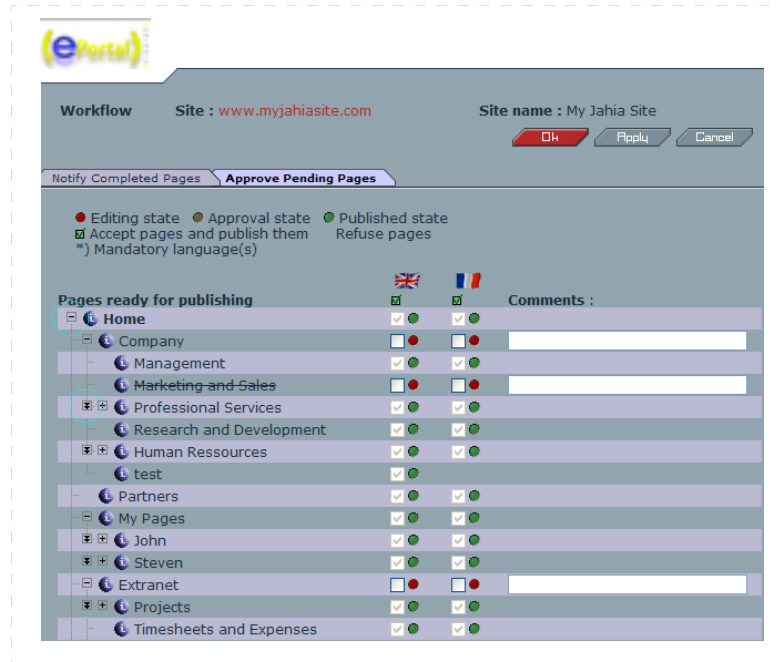
The Page Color Status Buttons are displayed for each language as your Manager may validate a page in one language while asking for certain modifications in another language. Check the Languages section in the next chapters to know more about it.

The current selected language is displayed with a colored flag.


### 5.3. PAGE WORKFLOW


From the Status bar, you can access the Page Validation Workflow interface. You may only access the Workflow interface if you have Write or Admin permission on the current page or at least to certain elements on the current page.

Figure 5-2 : Workflow interface



When opened, the Workflow interface display only 3 levels of pages. You can of course expand and collapse each section to display more levels by clicking on the “+” and “-” signs.

The  icon allows you to expand all level of a section with one click. If you wish to expand completely the tree of the website, you can proceed to the following:

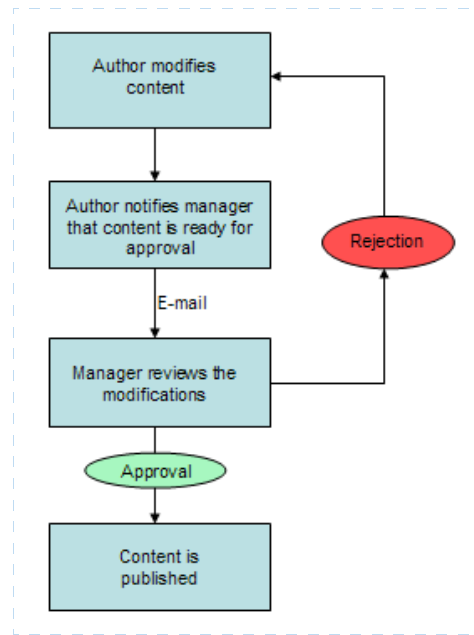
1. Click on the “-” sign of the Home page to collapse all pages. Only the Home page will then be displayed.
2. Click on the “expand all” icon (  ). You will then have the full tree of your web-site expanded.

Please note that the all-expanded tree can take some moments to load depending on the size of your website.

Basically the workflow lets you:

1. Request a page approval (Notify a page) if you are an Author
2. Validate a page if you are a Manager.

Figure 5-3 : Workflow process



The usual edition process in ePortal is the following:

1. One or several Authors edit and if required translate the content. This can be done on a single page or on a complete set of sub web pages (e.g. your new Marketing section).
2. Once the Authors are satisfied with the modifications, one of them initiates a request for approval.
3. He selects the page to notify (several pages may be selected at once).
4. All the pages waiting for an approval are now blocked in edition until a final validation occurs.
5. The Managers review the content modifications.
6. The Managers can then accept or refuse the pages. Approval may be done on a page per page and language per language basis.
7. If accepted, a new archive version of the prior live content is automatically created in the database and the new content goes live.
8. If refused, the page goes back to the editing mode. Authors may edit content again to correct errors.

#### Rule 1: Author

To summarize, an Author may:

- Add new content or add new sub pages
- Modify/Suppress/Move/Rename existing content objects
- Translate the content
- Send a Request for Approval

### *Rule 2: Manager*

A Manager may:

- Do the same actions as an Author if he cumulates Write and Admin privileges.
- Set the permission rights (default: rights inheritance apply = permissions from the previous page)
- Validate or Refuse the Requests for Approval

## 5.3.1 Other Workflow Options

### *Multiple validations at once*

The Workflow interface automatically displays all the sub web pages on which you have adequate permission rights (Write or Admin). You can then select several pages at once (to avoid going on each web page individually) and initiate a request for approval or a validation.

If you wish to validate or notify all page in one language, you can select all pages by clicking on this small icon below each flag : . This will select all pages in editing/approval state in the given language. You can of course then unselect certain pages. If you click again on the same icon, you will reverse the state of each select box: checked boxes will be unchecked, and unchecked boxes will become checked.

**Tip:** You can validate a sub web page even if the parent page is still under modification. The page will then not be directly available through the ePortal menus. You may however access it through a direct url if you know the exact page ID. This is especially useful if you want to validate pages while reviewing them even if the parent page is still not ready. This will avoid you to come back later on the page to validate it.

### *Per language validations*

ePortal proposes to notify or to validate a page on a per language basis. Indeed it is sometimes useful to be able to publish only a sub set of pages in a specific language and to wait on translations to publish other languages later on.

### *Mandatory Languages Validation Process*

Partial language validation is not possible for mandatory languages. Each language sets as mandatory by the Site Administrator shall be fully translated before a notification or a validation is possible.

To ease content management in multiple languages, the workflow interface indicates to the Authors the fields that have not been properly translated.

### *Workflow Notifications*

Each page flow (a request for approval, a page refusal,...) may be commented. All the comments are sent by e-mail to the various page Authors and Manager if their e-mail address has been configured correctly in their user settings (cf. Administration Guide). These notifications might be useful for an Author to warn his manager of the completion of a section or for a Manager to summarize to the Authors why the page was not validated.

### *Workflow Error Detections*

As mentioned above, the workflow will indicate for each page the various errors. Errors may be of two categories:

- Translation missing
- Other validation errors

## 5.4. COMPARED MODE

To ease visualization of content modifications on a page, a Compared mode was developed. The Compared mode may be accessed in the top bar Menu.

This mode allows you to rapidly see the differences between the page in Live and in Edit mode.

Figure 5-4 : Compared mode

**Step 1**  
Press the **Login** button and **enter** the username/password you choosed during the installation wizard. The menus will automatically change in regard to the corresponding profile.

**Step 2**  
Clicking the **Edit** button will let you enter in the page edition mode giving you the possibility to change, add, manage and remove pages, field contents, web applications, etc according to the rights you have.

The default settings for the Compared mode are the following:

- New content appears in Blue
- Updated content appears in Green
- Deleted content appears in Red.

Warning: your templates or certain elements of the page may not have been customized to support content comparison. These elements will then not be highlighted in Compared mode even if their content has been modified. Check with you Template Developer if it is the case.

## CHAPTER 6 **USING THE EDIT MODE**

*This chapter describes the ePortal Edit Mode. This mode is only available to people with a Write (author) permission on a page or one of its content object. The objective of this mode is to allow the end-user to easily add, modify or suppress content or portlets inside the site without any technological knowledge.*

### 6.1. EDIT MODE

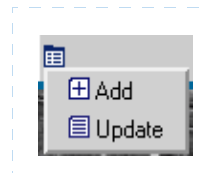
ePortal has a set of simple functions, allowing anyone to create and manage the various objects of content (e.g. a page, a field or a portlet).

To access the edition function, just click on the Edit Mode tab on a page where you have the right permission. Several edition icons will appear and will allow you to edit and modify the various content objects.

#### 6.1.1 Edition icons

You can now click on the key editing features (small edition icons - just roll-over the mouse on top of them to know their function). In the ePortal default corporate template, the icons are grouped together in a drop down menu like this :

Figure 6-1 : Edition icons



Please find a short summary of these icons below:

##### 1. Object properties icon

Allows you to display information regarding the current object, for example a page (access rights, template in use).

Figure 6-2 : Object properties icon



##### 2. New Content icon

A function at your disposal at any time to create a new web page or add a new content object.

Figure 6-3 : New content icon





### 3. Update icon

The content of the current object will be displayed in a web form in order to be modified. You will then have to validate ("save") your changes once you are satisfied with your modifications. While you edit this content, no other author may edit it simultaneously. The ePortal locks are automatically managed by the system and prevents two users to modify the same content simultaneously

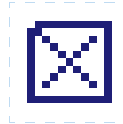
Figure 6-4 : Update icon



### 4. Delete icon

Allows you to remove already published information on a page and its sub-pages. The content is not definitively deleted from the database and may be restored afterwards if required (cf. versioning section).

Figure 6-5 : Delete icon



**NOTE:** Be aware that when you delete a page, you will also delete all the sub-pages.

### 5. List properties icon

The "list properties" icon allows you to sort your list of content objects or to modify the permission rights on the list

Figure 6-6 : List properties icon



All these interfaces will be explained in details in the next paragraphs

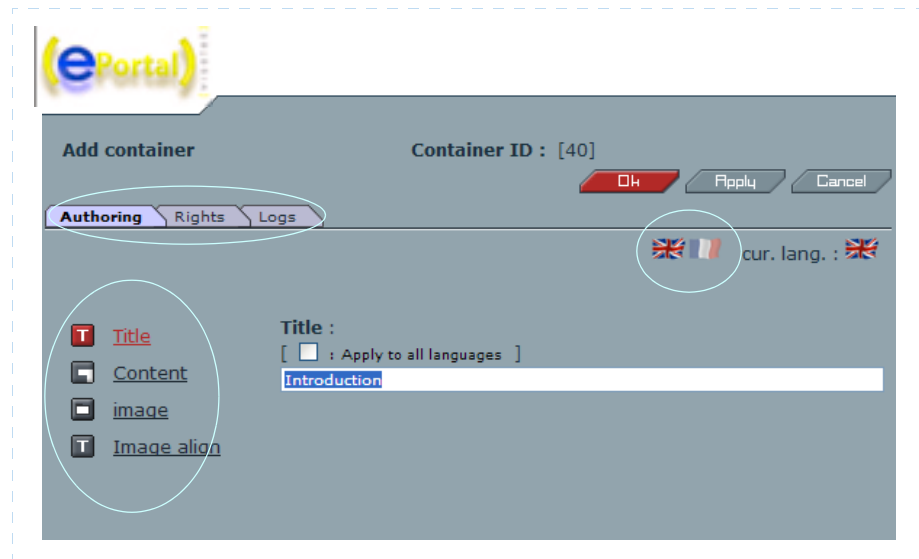
## 6.1.2 The ePortal Edition Pop-up Windows Mechanism

ePortal is based on a simple visual editing system based on pop-up windows. Each time you click on an icon, a pop-up window will appear and will let you manage the related content object. As soon as the modifications are done and saved, the Author may immediately see the result on his web page.

Each edition pop-up is structured in the same manner:

- A top bar with various possible operations
- The languages available
- A left bar with the fields available
- A central part to edit the content

Figure 6-7 : Authoring interface options



According to your rights, you may either access:

- **Authoring**  
Edit the content. Only this tab is available for Authors. All the other tabs can be only accessed by the Content Manager.
- **Rights**  
Manage user rights, i.e. to delegate the content to people with appropriate rights (Readers, Administrators). Users may then view only the relevant information and content. Rights can be set for groups or for a single user. See section "Settings Rights" for details.
- **Logs**  
Access the object's log file that provides information on any actions executed on the object.

### 6.1.3 Lock-in / Lock-out principle

If another Author is already editing an content object, a lock icon and a red frame will appear in Edit mode around the object. While the other Author is editing, you can not modify the content. This prevents the overwriting of two modified content submitted simultaneously to the database. Only one author may edit a field at the same time.

By clicking on the lock icon, you may see who is currently editing the content object.

All the content elements on a page are also locked-in if they are under validation. This prevents an Author to request for a validation and a few minutes later another Author begin modifying all the texts. So as soon as a page is under validation, no author may edit it any more.

## 6.2. MANAGING FIELDS

Let's start with the edition of basic objects of content.

ePortal has currently 11 types of fields:

1. Small Texts: Texts that have less than 250 characters
2. Big Texts: Long texts with an unlimited number of characters. The Big Texts can be edited with one of the WYSIWYG editors installed with ePortal to ease content input.
3. Integer: any integer number
4. Float: any number
5. Boolean: True or False
6. Link Field: URL link
7. File Field: Link to an uploaded file
8. Color: a color picker
9. Date Field: a date picker
10. Application: Embed a web application (portlet) in your page at the current position
11. Page: a new ePortal page. Check following chapter to know more about managing pages

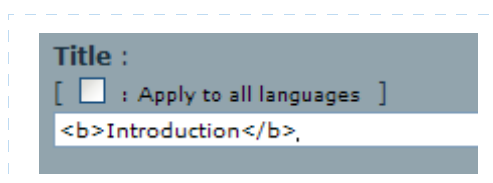
**Tip:** Apply to all language option

The Apply to all language checkbox lets you copy the current content of a field to all the other languages. This may be useful when you want to avoid copy-pasting content that is similar in all languages.

### *Small Text field*

The small text field is usually the most commonly used in ePortal. It is limited to 250 characters. Text fields support HTML code. Here is an example:

**Figure 6-8 :** HTML support in "small text" field



Type in the HTML code above and click OK.

**Warning :** if an HTML tag is missing or incorrect, you will not be able to save it. Clicking on OK will not allow you to close the window.

ePortal supports Unicode set of characters and if your ePortal Site Administrator has installed this extension, you may also enter extended set of characters (Cyrillic, Greek, Japanese...).

### Big Text field

The Big Text is similar to the Small Text field, except that there is no limitation in size. Big Texts can be edited with one of the HTML WYSIWYG editors provided by ePortal. Additional third party commercial WYSIWYG editors may be installed and configured specifically for ePortal on a case per case basis.

By default ePortal is provided with three editors for big texts:

- The standard text based editor (HTML text mode editing)
- An activeX WYSIWYG Editor - Windows IE users only.
- A cross-browser Java applet - Ekit

The RealObjects editOn pro Commercial WYSIWYG Editor (Mac, Unix and Windows, IE and Netscape) can also be used to edit Big Text fields. (more information about editOn Pro on [www.realobjects.com](http://www.realobjects.com)).

Figure 6-9 : “Big text” field in text editor

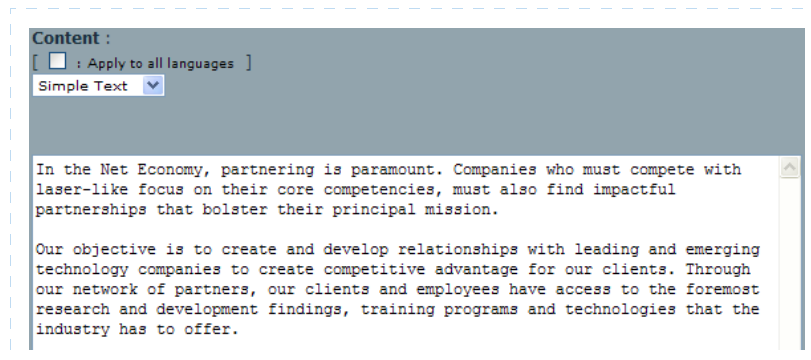


Figure 6-10 : “Big text” field with ActiveX editor

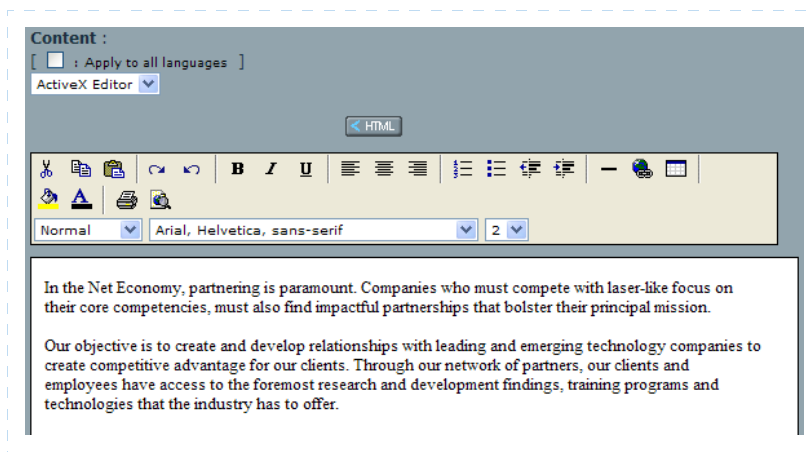


Figure 6-11 : “Big text” field with Ekit Java applet editor

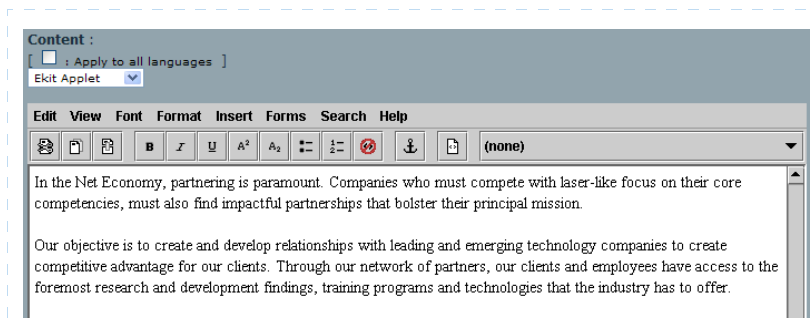
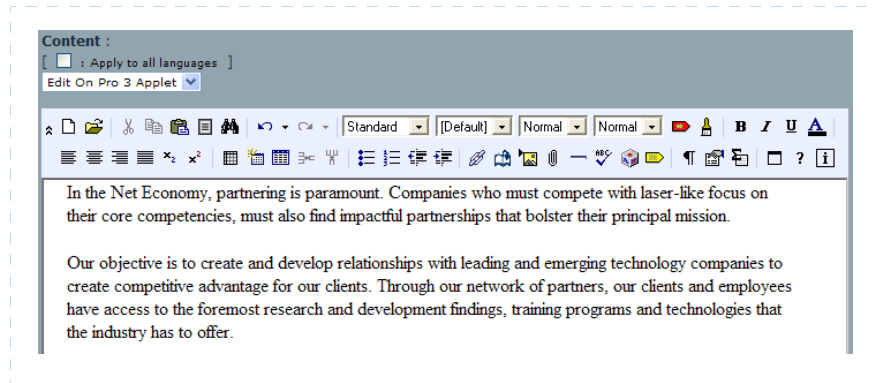


Figure 6-12 : "Big text" field with RealObjects editOn pro java applet editor



**Tip:** Open the ActiveX Editor and a browser, select a picture you want to add on your page (e.g. the weather picture of the day), drag and drop it into your ActiveX Editor. Save it. The picture is now on your web site.

**Tip2:** Open one of your Word Document. Select the area you want to publish and copy it. Use the Paste icon of the ActiveX Editor. Save it. The Content is now available in your web page.

**Warning :** if an HTML tag is missing or incorrect, you will not be able to save it. Clicking on OK will not allow you to close the window.

*Integer Field*

The Integer Field lets you input a round number.

*Float Field*

The Float Field lets you input any number.

*Boolean Field*

The Boolean Field lets you select between the values True and False.

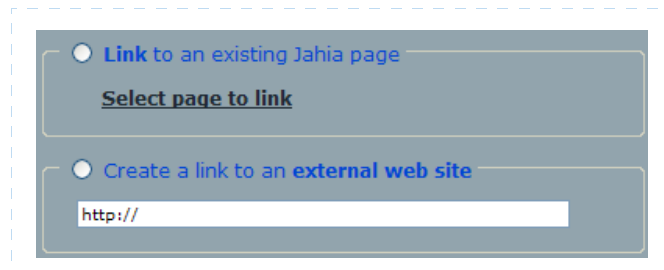
*Link Field*

Links Field leads you to another page or website. You have two type of links in ePortal:

"Internal Links: cross-links towards another ePortal page

"Remote Links: links towards an external web site

Figure 6-13 : Link field

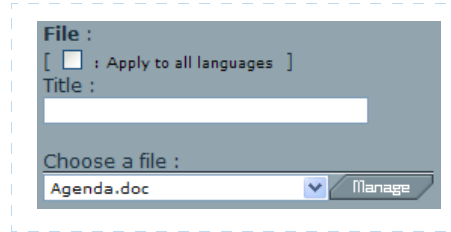


Internal links are controlled by ePortal. If the page is removed, the link field will also disappear to avoid any broken links. This control is not done for remote links.

*File Field*

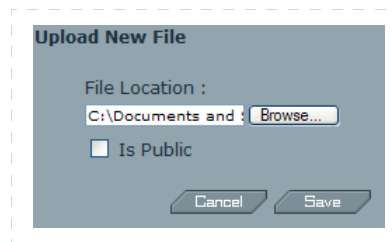
Various office documents, pdf's etc... can be made available to users for download.

Figure 6-14 : File field



ePortal provides a simple mechanism to upload files on the server.

Figure 6-15 : File uploading



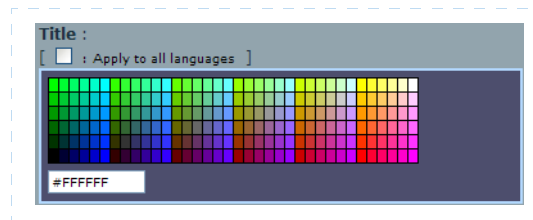
**Options:**

**Is Public:** If you check this box, the file will be visible by other Authors and will be available for all the pages of the site.

*Color Field*

The Color Field lets you choose a color thanks to a color picker .

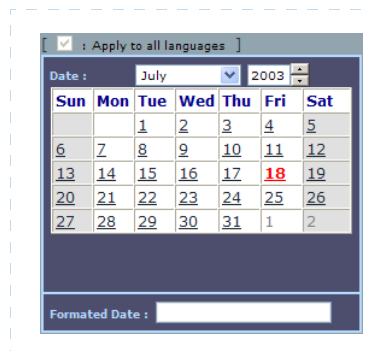
Figure 6-16 : Color field



*Date Field*

The Date Field allows you to easily enter a date.

Figure 6-17 : Date field

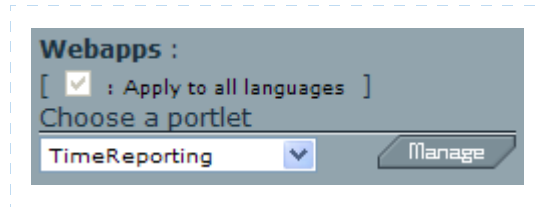


The date field is stored in the database as a date. Then your template developer may customize the display of the date according to what he wants to show.

*Application Field*

The Application field lets you select and embed a portlet inside your page. A Portlet is a dynamic field that will contain some business logic. This field will be automatically executed when you launch the page. This field is the base field for all the Corporate Portal part of ePortal to construct MyYahoo like home pages

Figure 6-18 : Application field

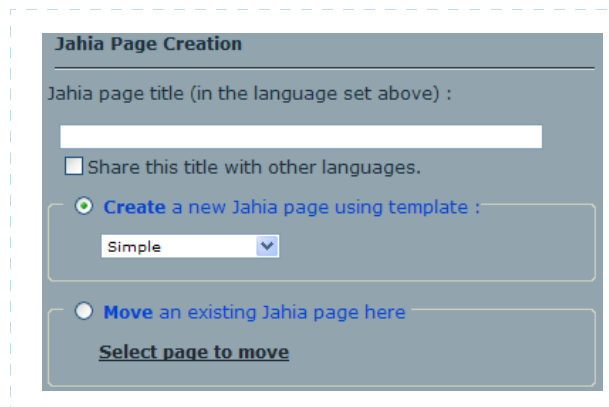


Check the Managing Portlets Section to know more about it.

*Page Field*

New Pages are also consider into ePortal as a type of field. Please check the “Managing Pages” section to know more about it.

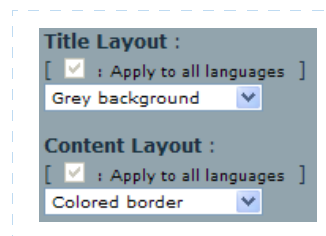
Figure 6-19 : Page field



*Shared Fields*

The template developer may decide that a certain field is shared between all the languages. Then you will only have one content for all the different languages (e.g. Name, ZIP code, ...).

Figure 6-20 : Shared fields



You have to be aware that when you modify such a field, all the languages will be impacted. The effect is that the status bar in all the languages will be turned to red at the same time. It is the same if you validate such a content in only one language. As it is a shared field, all the other languages will be also validated. You can not have a desynchronized status (one language in draft mode while the other is live mode for this kind of fields).

### 6.3. MANAGING GROUPED FIELDS: CONTAINER AND CONTAINERLIST

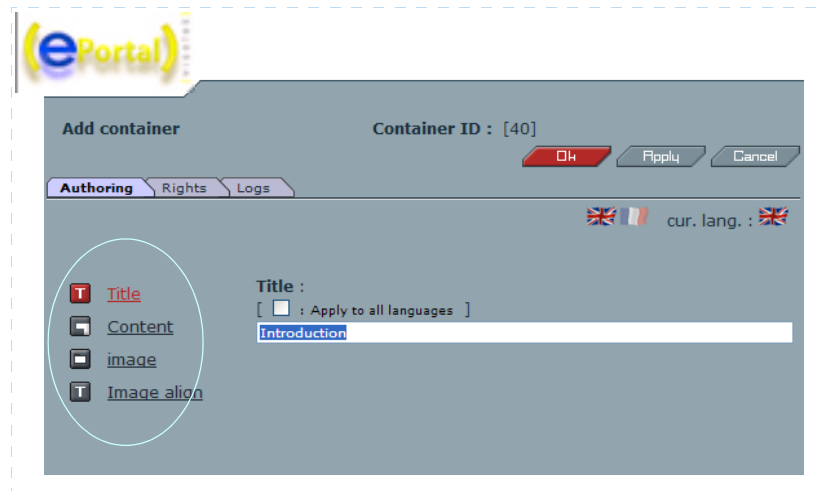
The ePortal Containers enables you to add grouped elements (set of several fields grouped together). This is what we call a container in ePortal.

This is usually the most common way to use ePortal as most of the times, one field is not enough to create a pertinent content object (e.g. an object news or an address).

So the web designers, during the development of the templates, may decide to group together several ePortal fields (cf. list above) into one container.

To edit a container, simply click on the container icon. You will see an edition pop-up that regrouped all the fields to edit at the same time.

Figure 6-21 : Fields of a container



**Tips:** It is not mandatory to fulfill all the fields. Certain fields may be left blank and will simply not appear on the page. Other fields may be used as meta-data and may also not appear on the web page because they will be used later on for other purposes (an expiration date for example).

#### *Fields regroupment in a container*

Certain fields may be regrouped together in one web page (e.g. all the “small text” fields).

Figure 6-22 : Field regroupment



This simplifies the input of data and avoids useless clicks to move between all the fields in the container. Certain fields may not be regrouped because they need a specific editor (e.g. a big text).

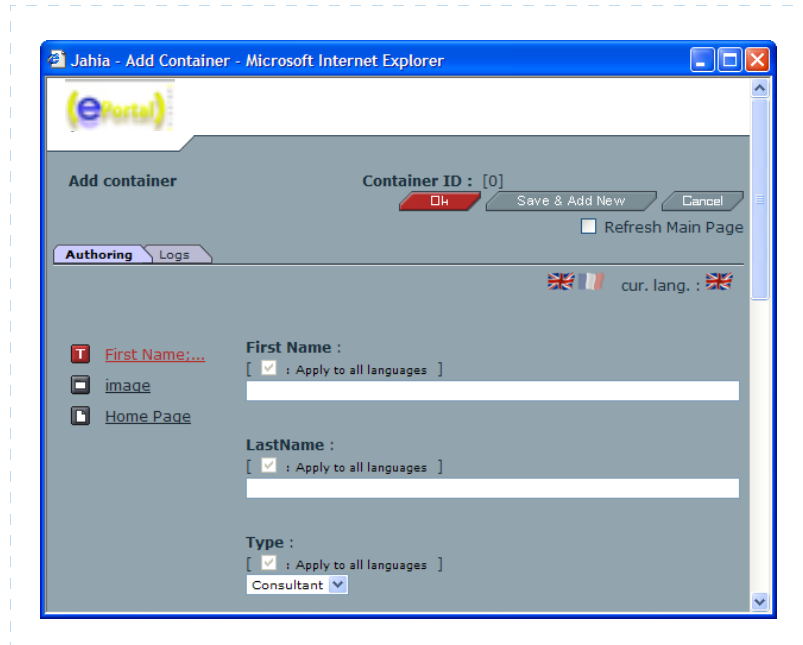


### 6.3.1 ContainerList

Once the container is created, you often want to repeat it on a page (there is usually more than one address or one news). This is what we called a ContainerList in ePortal: a list of the abstracted content objects your webdesigner has defined. They are usually placed one after the other on a web page.

Click on the add button to add a new container to your list.

Figure 6-23 : Add new container window



**TIPS:** Keyboard shortcuts can be used to ease input of content:

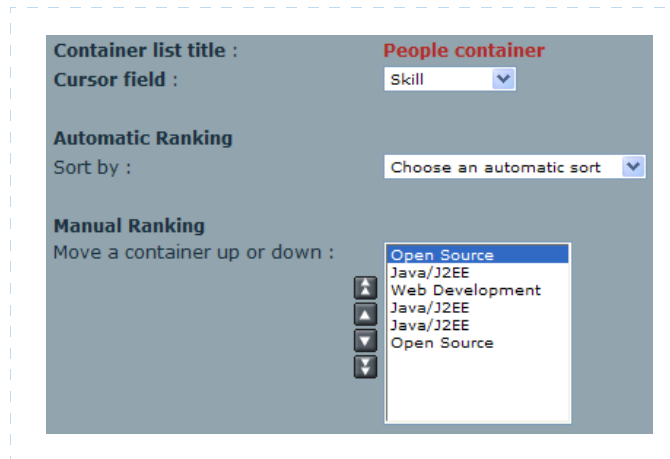
- *Ctrl+Tab* : scroll down through all fields of a container
- *Ctrl+Enter* : Submit the content and close the window (equivalent to clicking OK)
- *Ctrl+M* : Save and Add New
- *Ctrl+W* : Cancel

### 6.3.2 List Properties

When you have several containers, you often want to be able to sort them in a given order. To perform this operation, you can click on the List Properties icon in the bottom of your list.

You can then choose the filtering key (the field on which you want to perform your sort) and the type of sort you want to apply (ascending, descending,...). You may also decide to perform a manual sort (you select yourself the order of the various elements of the list).

Figure 6-24 : ContainerList properties



## 6.4. MANAGING ABSOLUTE FIELDS

All the fields are by default relative to a page. But your web designer may have decided to share some fields on several pages (e.g. your page header or footer). This is known as Absolute Fields in ePortal (in opposite to a Page Relative Field).

You can edit such fields in the exact same manner as other fields. However your changes will impact several pages at once.

### 6.4.1 Absolute Fields Validation

You can modify an absolute field indifferently on all the pages where it appears. However you can only validate an absolute field on its parent page. For example, footers and headers are usually defined in the home page of your site. So it is only when you approve the home page that changes will be impacted on your whole web site even if you have done the content modifications from another page.

This system was put in place to avoid having to re-validate the whole web site when you simply change a page footer.

## 6.5. MANAGING PORTLETS

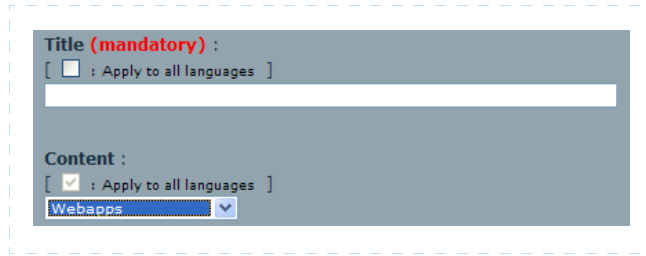
A portlet is a way to embed a web application or a web service into ePortal through a single and common Web interface. This provide a standard and easy way to add new functions to your web site. This also open the door for integrating collaborative tools into some of your web pages (e.g. discussion forums, mailing lists,...). One of the main advantages of ePortal is that it natively supports standard java web applications (servlets) as portlets. You may then embed a web application in any area of your pages.

ePortal has also a specific tool to help users position by themselves their portlets on the screen without having to create a new template. This tool is called the Layout Manager and will be described later on in this section.

### 6.5.1 Insert a new Portlet with a web application

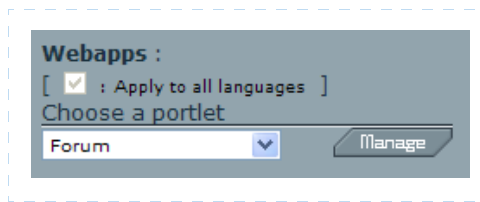
You may insert a new portlet in any page like any other type of content fields.

Figure 6-25 : Add a portlet



For example, you may have, inside a container, an application field. If you select the application field, you will be able to choose which application you want to insert.

Figure 6-26 : Select a web application to add



### 6.5.2 Role Mapping

Each web application may be setup with different roles. A Role gives you the right to access to different functions of a web application. While inserting a new portlet into a web page, you will have to map the roles of the web application to the existing users of your ePortal system. Once this mapping is done, each time the user will connect to the page, he will be automatically identified by the portlet in the correct role(s) (a user may cumulate several roles).

The same web application may be used on several web pages with different roles for the same users. For example, a user John may be able to access some administrative role of a portlet in a certain part of the site but only act as a reader in another part.

Click on Manage to select which groups or users you want to assign to each of the application's role.

Figure 6-27 : Manage roles window



Figure 6-28 : A portlet with an application

Example of a portlet with an application:



### 6.5.3 The Portlet Layout Manager

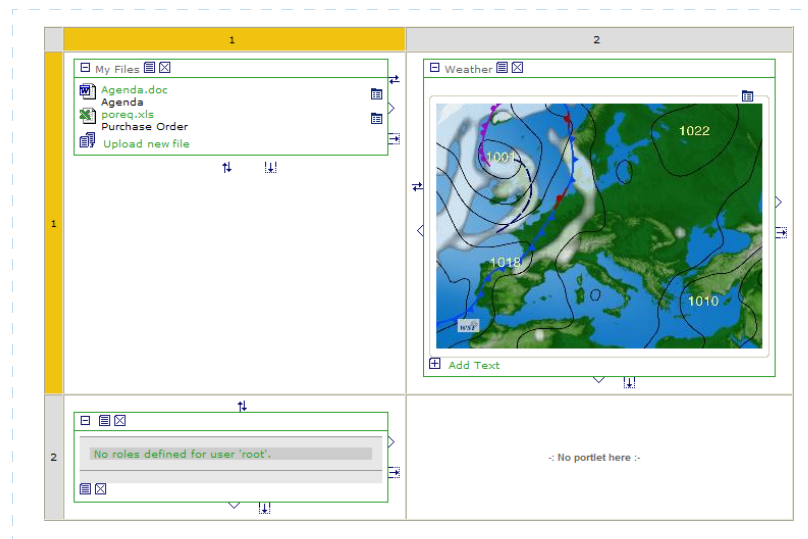
The Layout Manager is a graphical interface customized in the template by the web developer that lets the users position and move by themselves the portlets on a page (or an area of a page).

To use the Layout Manager, proceed to the following:

- Login into the portal
- Switch to edit mode

You can now access the layout manager. Small arrows let you move portlets in your page.

Figure 6-29 : Layout manager



Default icons are the following. These icons may be replaced by your webdesigner. Check with your custom ePortal documentation if it the case.

- Move Portlets
- Swap Portlets
- Increase Width
- Increase Height

## 6.6. MANAGING CONTENT IN SEVERAL LANGUAGES

ePortal now supports multiple languages. Your Site Administrator may have customized the system from different manners that will impact afterwards your usage of ePortal.

You can see the various languages configured in your web site in the top bar menu.



### 1) All languages are by default optional

If no language is set as mandatory in the system, Authors or Managers do not have to translate content and may choose to fill content in a given language only. This is the most common settings for Intranet or Extranet purposes. No verification check is done during the validation process and a page may only be partially translated or even not translated at all.

### 2) Some languages are mandatory, others are optional

The Site Administrator may decide that one or several languages are mandatory (e.g. English). So the ePortal system will force Authors to translate content before any possible validation. Such an option is useful for Internet web sites where you want to keep similar and homogeneous web sites available in several languages.

### 3) Languages mixing

The Site Administrator may decide to let the ePortal system mix languages on the same web page if certain objects of content are not translated.

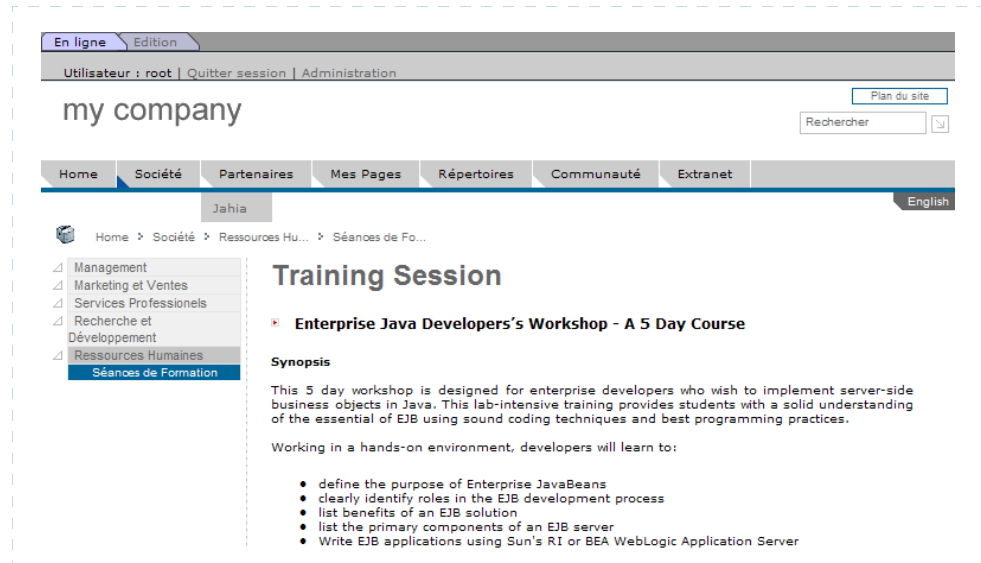
For example if you have a left column of text available in English but a right column only available in French and if you browse the site in English, by default you will not be able to see that there is a right column. You will have to switch to the French language to be able to display the untranslated information. However, you may want to manage some web sites, especially Intranets, where the Authors are not always forced to publish all their content.

So ePortal provides a mechanism to let the users see as much content as possible by following the order of their languages preferences. If the system detects that the right column was not translated, it will try to display it in the next language of preference of the current user (e.g. German), and so on until he can find the French content.

**Figure 6-30** : Page without content in French, languages mixing NOT activated



Figure 6-31 : Page without content in French, languages mixing activated

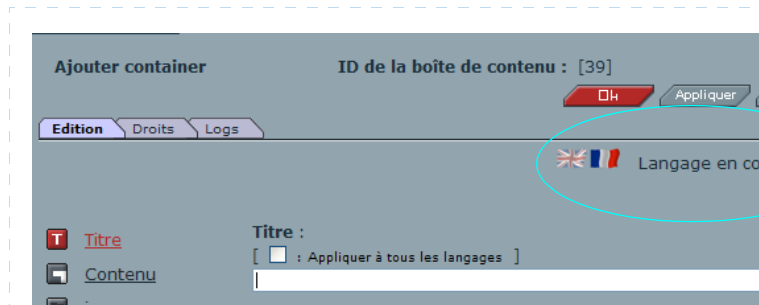


**Tips:** If you have setup a site with two mandatory languages but you want to create an exception (finally there will be a page that will be available only in one language), the Author may ask the site administrator to temporarily deactivate the mandatory languages checking mechanism. The user can then validate his “one language only” page. The Administrator just needs to reactivate the mandatory language option afterwards.

### 6.6.1 Translating Field Content

In all the Edition pop-ups, you will find the same topbar indicating all the available languages. Just click on a flag to access the fields in another language.

Figure 6-32 : Available languages



### 6.6.2 Shared Content Fields

Some Fields may be shared among the various languages and can not be different. For example the fields:

- Integer
- Float
- Date
- Color
- Link

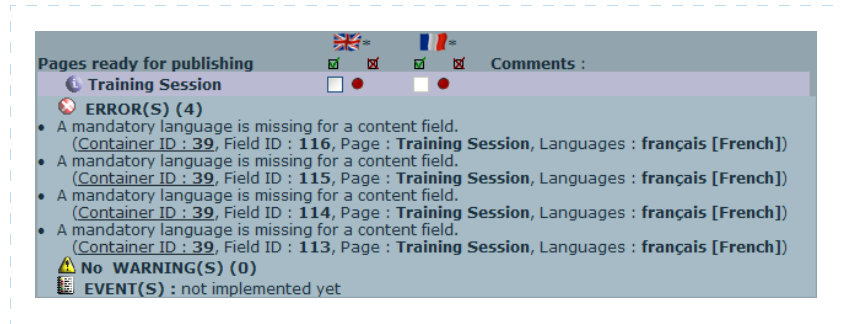
will be similar for all the languages. So if you modify such a field in one language, all the other languages will be immediately impacted.

### 6.6.3 Language Checking during Validation Workflow

The Workflow will check for the mandatory languages and will verify the completeness of the translation(s) done (each field input in a certain language has to be completed in all the mandatory languages too).

To ease input and detection of missing fields in other mandatory languages, the Workflow offers an integrated diagnostic tool that will indicate to the Authors the list of uncompleted fields.

**Figure 6-33** : Mandatory languages check during validation phase



## 6.7. MANAGING PAGES

Now that we know how to update the content of a page, let's try to modify the structure of the web site. In this section, we will learn how to create a new page, to link pages together or to move a page in the site.

### Global Site Understanding

Basically ePortal is a tree. The home page of your site is the trunk, the pages are the branches and the fields are the leaves. You can add a new branch directly to the trunk - the first level of pages - or to another branch - the nth level of pages.

Once your tree is created, you can use cross-links between branches to go directly from a point of your tree to the other (internal links).

Keeping this comparison in mind while creating your site will ease your understanding of the system.

### 6.7.1 Adding a new Page

Your first action is usually to add a new page in your site.

To create a new page, you have to be located one level above the page you want to create, and then click on "Add a page".

Figure 6-34 : New ePortal page

The screenshot shows a dialog box titled "Add container" with "Container ID : [0]" and buttons for "OK", "Save & Add New", and "Cancel". There is a "Refresh Main Page" checkbox. Below the dialog title are tabs for "Authoring" and "Logs". On the right, there are language selection icons and "cur. lang. : [UK]".

Under the "Link" icon, the text reads: "Please choose one of the following Jahia page operations. N.B. The page title is the only object which can be multilingual."

**Jahia Page Creation**

Jahia page title (in the language set above) :  
[Text Input Field]

Share this title with other languages.

Create a new Jahia page using template :  
Simple [Dropdown Menu]

Move an existing Jahia page here  
Select page to move [Text Input Field]

Link to an existing Jahia page  
Select page to link [Text Input Field]

Create a link to an external web site  
http:// [Text Input Field]

Don't create Jahia page  
This option will differ the page creation.



Five options might be available to you (your template developer may have specifically limited the number of fields you can select):

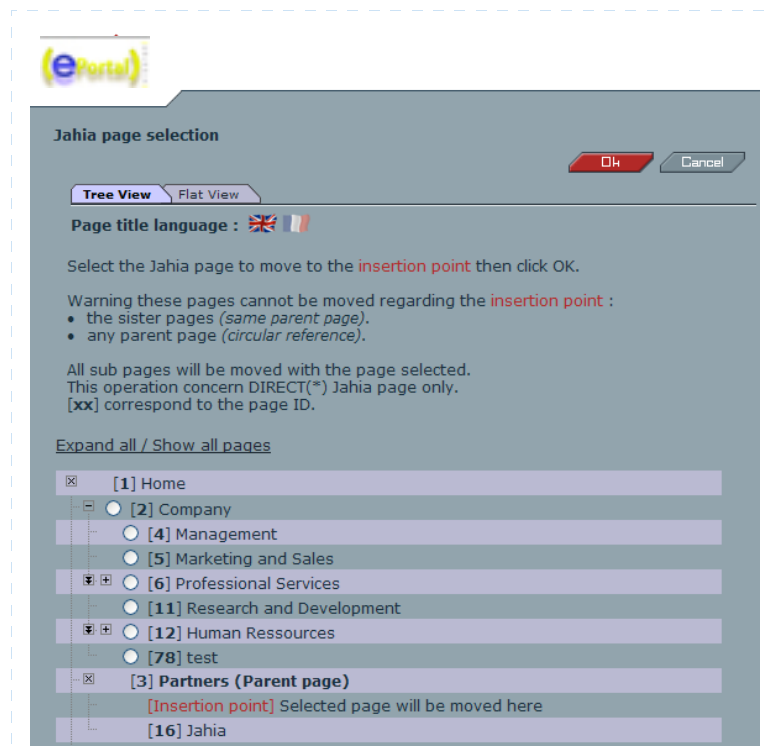
**1. Title:** Type in the title you want to give to the new page. The title will appear as a navigation link in the current page. Thanks to the languages flags, you may immediately input the title of your page in different languages.

**2. New ePortal Page Using Template:** Is a pull down menu giving you a number of prepackaged templates to choose from. A template is a predefined layout (with colors, borders, shapes, i.e: "look & feel") in which you will be able to add new content.

**Warning:** you may not see all the available templates in the site. Templates also have permission rights. Check with your Site Administrator if you can not access a specific template.

**3. Select page to move:** Displays the list of all the pages you can move under the current page. You need write permission on a page in order to move it elsewhere in the site. Just select the page or the section you want to move by selecting the corresponding radio button and click OK.

Figure 6-35 : Page selection for page moving, tree view



**4. Select page to link:** Creates an internal link to one of the existing page in the site. Only page where you have some read permissions are available. Just select the page you want to move to link to by selecting the corresponding radio button and click OK. This selection can be done either in tree view, where you see the pages as a sitemap, or in flat view, where pages can be sorted by page ID, by name or by level. The same applies to the "move page" feature.

Figure 6-36 : Page selection for page linking, flat view



**5. Remote URL:** The chosen URL links you to any other site you wish to go to. Type in any URL you wish to link from your portal.

**NOTE:** Make sure the URL begins with: `http://`  
 You can also link to files or directories on a local server if you are working on an Intranet and all people have also access to the same network disks. In that case the link will be similar to: `\\server\documents\`

Now, click on OK. On the page you should now see a link with the title you gave to the new page. To start editing it, you only have to click on the link and go to the new page.

*Staging Mode*

Once you have finished creating your new page, it will only appears in staging mode and not in the live published web site. Similar to other field based modifications, you will have to go through the Workflow interface to validate your newly created page.

This option is quite useful as you can build complete sub web-sites and validate several pages together at once so you only have complete and finished sections going live.

6.7.2 Moving a page

The system to move a page is very similar to the one to create a page.

To move a page or a set of pages, you have to be located one level above the future destination point. Then, just make as if you wanted to add a new page, but at the place of choosing the option [New Page], choose the option [Move Page]

### 6.7.3 Crosslinking towards an existing page

The system to link towards an existing page is very similar to the one to create a page.

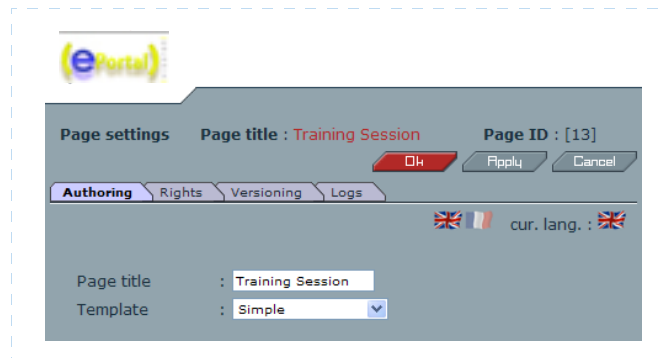
To create a crosslink in your menu, you have to be located one level above the future destination point. Then, just make as if you wanted to add a new page, but at the place of choosing the option [New Page], choose the option [Link Page]

### 6.7.4 Modifying the page settings

The Page Properties option allows you to administer the global settings of your page such as:

- changing the page title
- changing the template currently used for the page. AN Author may be able to switch to another template at any time. All the common data between the old and the new template are kept and do not need to be typed again. Furthermore, if you decide to come back to the original template later on, all the original data is not lost and will be restored again. This may be practical if you want to switch from a one column template to a two column template, for instance.

Figure 6-37 : Page settings



### 6.7.5 Deleting a Page

Of course you can also delete a page and its content.

**Warning:** deleting a page will also delete all the sub web-pages. So take care when you delete a page and verify that you are not deleting more information that what you want.

#### *Restoring a deleted page*

If you suppress a page unintentionally and if it was previously versioned (the page was already approved and is now in the archives), you can use the versioning capabilities to restore your deleted page.

However, if your page was never validated before (still in draft mode) and if you suppress it, you will have no way to recover your lost data.

## 6.8. MANAGING USER RIGHTS

One of the strength of ePortal is its ability to delegate the administration and the edition of the website (or part of it) to other users. The ePortal User management, described in the “Setting Rights” section, is based on a standard, well known approach with users and groups. ePortal may also be linked to an existing LDAP server for single sign-on purpose.

Settings rights is a feature giving you a high level of security in limiting the information available to your users. For example, confidential information can be published only for users who have the rights to know about it. Moreover, groups of employees may benefit greatly of this feature by working collaboratively and effectively on their active projects without letting other employees see their work in progress.

This feature is only available to Content Managers and not to the Authors.

### 6.8.1 Rights architecture

#### What is an ACL (Access Control List)?

All the underlying security system of ePortal relies on the concept of ACL. By understanding this concept, you will be able to more easily manage your web site security settings.

Access rights exist at several levels :

- pages
- containers lists
- containers
- fields

The objective is to ensure that people cannot access information that is confidential or irrelevant in their daily work. Permissions can be allocated to Users (individuals) or to Groups.

You may think of these access rights as a separate file that is attached to every object of content of ePortal (a page, a container or a field). This is called an ACL (an Access Control List). An ACL lists the permission rights available for certain users and groups. So when you modify the permission rights, you modify in fact this list.

There is three important rules you have to retain:

#### 1. Automatic Rights Inheritance

When users or groups have specific permissions on a content object (usually a page), they keep automatically the same rights on all sub-pages created starting from this point (do not forget that a ePortal web site is a tree). The same is valid for all the sub-containers lists, sub-containers or sub-fields. By default all the sub-content objects inherit from the permissions granted to the parent object. To follow on the comparison with the tree, you may imagine that only certain objects of content have a specific ACL file, all the others will look into their parent object to check if such a file exists. If their parent object does not have such a file either, they will look into their grand-parent object file and so on until they know who can access or modify their content.

If the security permissions are not correct at a certain level in your tree, you may then decide to override certain rights (creating a new ACL file by granting or denying certain permissions on a sub-page, a sub-container list, a sub-container or a sub-field). If you do not modify any security settings, **inheritance will always prevail**.

This rule prevents you to spend too much time managing and customizing the site security as, in most cases, inheritance will be the most adequate setting.

2. Always keep in mind the entire tree of permissions.

Given the inheritance mechanism, you never edit the permission of a given content object alone but you modify the permissions for all the sub objects of content as well. This ACL will then also be used on all the sub-elements (sub pages; sub fields).

Once you have assimilated this principle, you will understand why you can not simply delete a user from a page but you will have to override his current permissions.

For example if a user has some write permission on the home page, you may want to create a new ACL entry for this user in a sub page of the site (e.g. to restrict some of his permissions). Then you copy the current user permissions and modify them. But if you now try to delete this ACL entry, the inheritance mechanism will prevail and the previous settings of the user, inherited from the home page, will come back again.

You will have then to keep the ACL entry for this user but to remove him some of his previous permissions (e.g. deny all permissions).

3. A user always has the highest level of permissions in case of ACL overcrossing

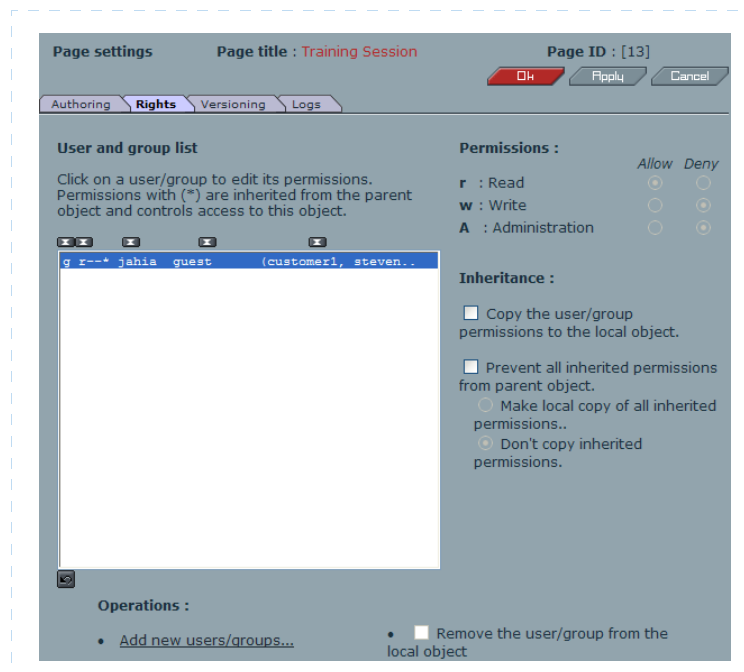
For example, if a user is explicitly denied a certain access right (e.g. can not write on this page) but at the same time belongs to a group which has this particular permission, the user will still benefit from the access right in question.

### 6.8.2 Setting rights

Let's try now to put some permission rights on a content object (here on a page).

On the page you want to set rights on, click on Page Settings, the following window will pop-up. In the main folder, you will have the following three options: Edit, Rights, and Logs. Select the Rights folder:

Figure 6-38 : View rights window



In this pop-up interface, you can see a list of users or groups with different arguments. All these elements may be listed in ascending or descending order by using the “up/down arrow” icon.

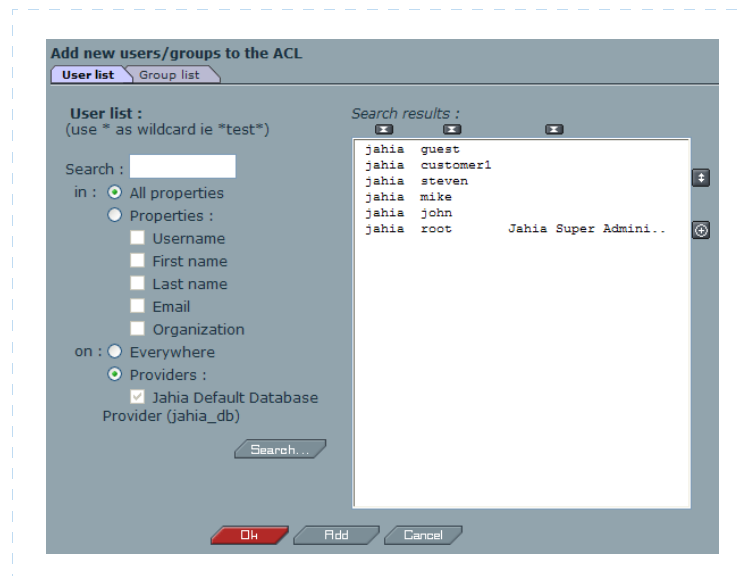
1. Group or User indicator: indicates if the ACL entry is a user or a group
2. Permission rights indicator: indicates who will have the rights to:  
 (R)ead (view the page only)  
 (W)rite (add or remove elements, create new pages, change the page template)  
 (A)dmistrate (define user rights, see logs; approve workflow)
3. Inheritance indicator (“\*“): indicates if the ACL entry is inherited from a parent object or not.
4. Name: Name of the Group or of the User
5. List of Users: Partial list of users in the case of a Group.

Thanks to this screen, a Manager may immediately know who can access this page and with which level of privileges.

### Add a new User/Group

The Content Manager can now try to add some new users or new groups. By clicking the Add New Users/Groups Button, the following pop-up screen will appear.

Figure 6-39 : Select New Users



You can now select the users or groups you want to give some privileges to on the current page. For example, click on a new unlisted group or user, and then click on OK. The new Group (user) has been added to the ACL. To promote the use of Groups in your site (more easy to manage on a long term basis), the Group interface comes first.

**Tip:** to add several users at once, just double click on the user, he will be automatically added to the ACL permission screen.

By default a newly added Group/User will only get a read-only permission. You will have to edit his permissions in the upper right panel if you want to grant to him more rights .

### *Remove a User/Group*

Let's try now to remove a user or a group. First look for all the users and groups ACLs that are not automatically inherited from a parent object (all those that do not have the "\*\*").

Now that you have found a local user or group, select the one you want to remove. Click on the Remove select box. Automatically the words - REMOVE - will replace the name of the selected user. Nothing will be done in the system until you click definitively on the OK or APPLY button. We strongly suggest you to use the APPLY button to manage permissions to be sure of your final security settings before leaving the interface especially with the inheritance mechanism. So let's click now on Apply.

Two scenarios are now possible:

1) the user disappeared of the list

The user was removed and has no more permission on this object of content.

2) the user is back again with a (\*)

The user was already declared in a parent content object. So when you deleted him locally, the inheritance mechanism prevailed. The user is then still listed but with a (\*) and with the permissions of the parent object. To "delete" such user, just copy locally the user and modify all his permissions to "Deny". The result will be the same as if it was deleted. The new permission settings will override the inherited once.

### *The Inheritance Options*

You can find in the lower right side of the interface two options to manage inheritance:

1) Copy the user group permission to the local object

This operation lets you make a local copy of all the inherited user permissions. You may use this command if you want to modify several user privileges on your current content object at once.

2) Prevent all inherited permissions from parent objects

This operation stops all inheritance starting from this object of content. Let's imagine you have some dedicated pages in your sitemap with information only available to the Direction. Your company recruits a new secretary and the Manager decides to grant to her some publishing rights on the home page to edit the company news. Automatically, because of the inheritance mechanism, the secretary will gain publishing rights on the whole web site. To avoid such a backside effect, this option let you create a barrier to the inheritance mechanism from a certain point. We however strongly recommend you to use groups instead of users to manage permissions and to only introduce new users inside existing groups. This will help limit such inheritance problems.

## 6.8.3 Setting rights on a field

Click on the update button of the field and proceed to the same operations as with pages.

## 6.8.4 Setting rights on container list

Click on the properties button beside the Container List and proceed to the same operations as with pages.

You cannot set rights on fields into a container if the template does not provide an update button on each field.

*Permission rights on a given field inside a containerlist*

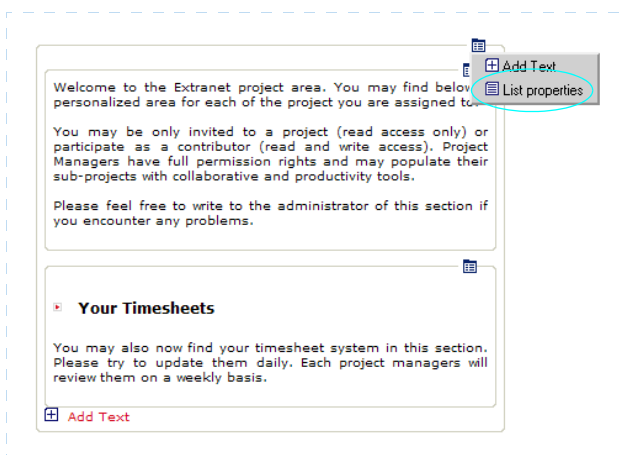
As a containerlist is a group of several containers, you may want to let only some users modify certain fields and let others modify the others. To do it, just click on the "List properties" icon of the ContainerList, and then in the Field Right folder. You can now select the various fields and decide which user can read, edit or administer which field in your containerlist.

For example, in an address book, you may want that only some authors may see or edit the salary field or the grade of the employee. However any author may change the internal phone number field.

**Example:**

A : Open the container list properties window by clicking on the corresponding icon :

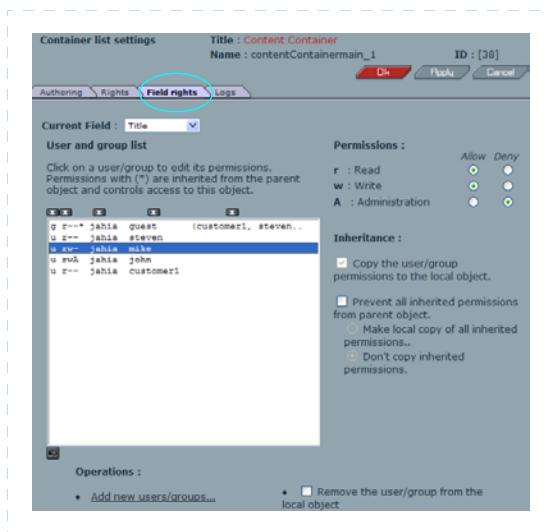
Figure 6-40 : List properties



**NOTE:** This icon is visible only when the container list has been effectively created. A container list is created only when a first container has been added to it. So if this icon is not visible, you must create a dummy container (a news item) in it. You can delete it later if needed.

B : Then choose the Field rights tab.

Figure 6-41 : Field rights panel

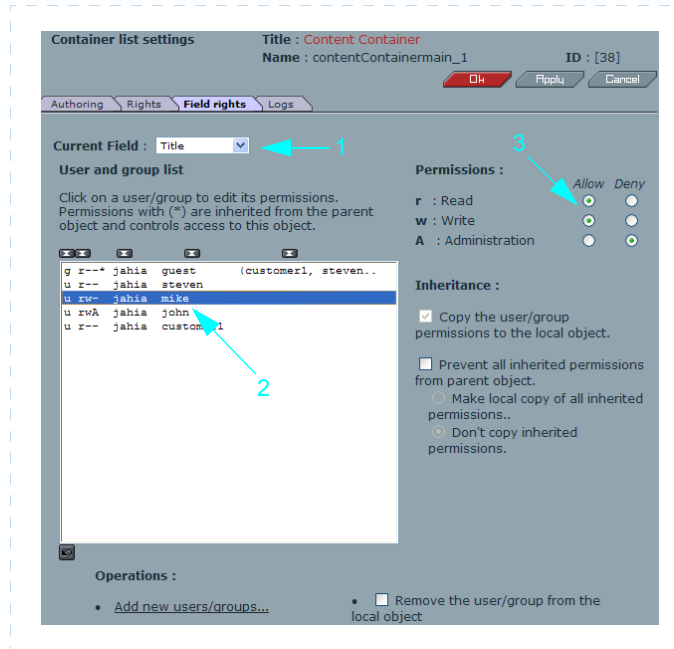




C : Choose the group or user you want to remove the ability to edit a given field listed in the fields list:

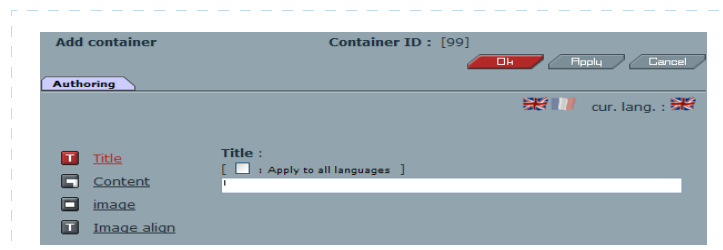
- Remove all permissions (r,w,A) if you want to completely hide a field in the Add or Update Container popup for a given user or group.
- Remove Write and Admin permissions (w,A) if you want a field to be read-only, not editable in the Add or Update Container popup for a given user or group.

Figure 6-42 : Change field rights



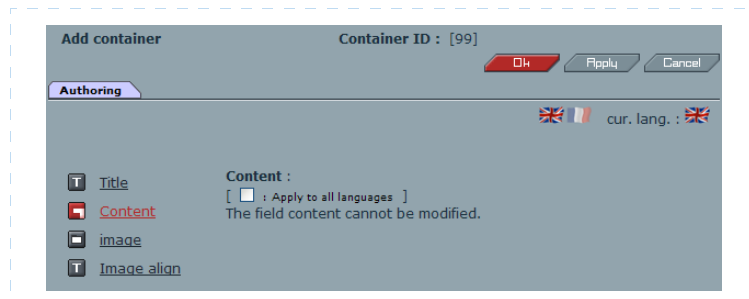
Examples of different layout of a same Update Container popup but with different permissions settings on fields ACL:

Figure 6-43 : All fields are editable



This is the default layout with default field ACL settings. All the fields are editable.

Figure 6-44 : Only "title" field is editable

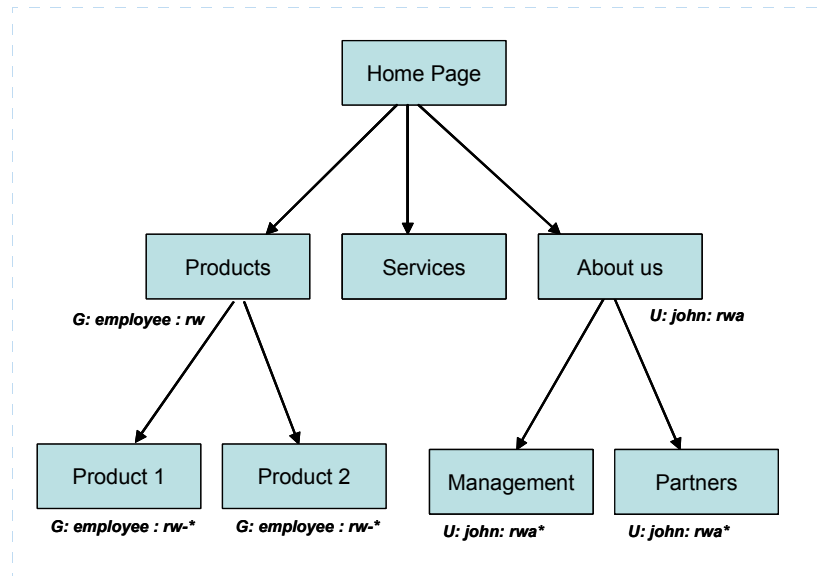


The same Update Container popup but for the current logged user, Write and Admin permissions (w,A) have been removed on the fields "Content", "image" and "Image align". The user can see all the fields, but he will only be able to modify the field Title. If Read permission would have been removed on these fields, only the field "Title" would have appeared.

### 6.8.5 Examples

You will find below some examples of ACL settings:

Suppose you have the following sitemap with these user permissions:

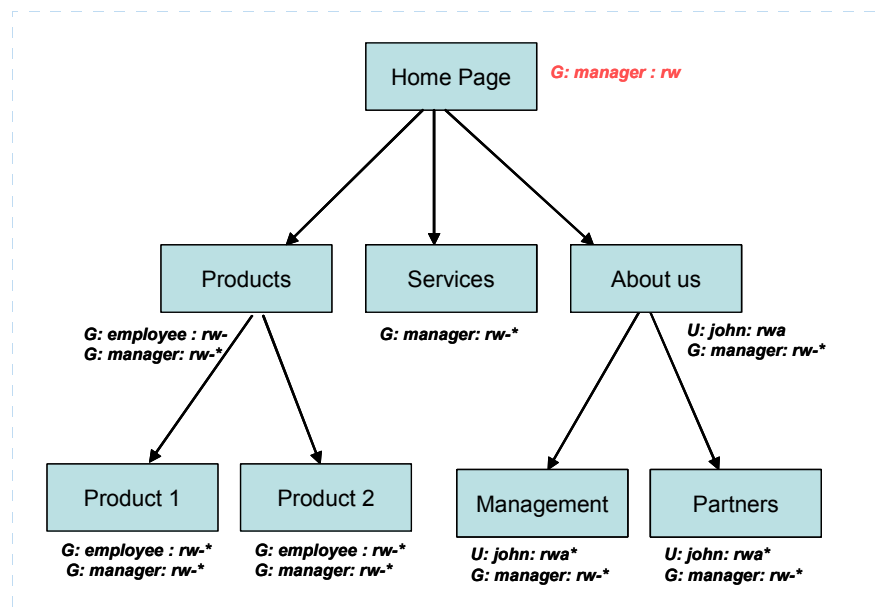


The group “employee” has read and write permission to the “Products” section, so the same rights are transmitted to “Product 1” and “Product 2”. The user “john” has full access (read, write and administration) to the “About us” section. The small star next to the permissions of the user/group indicates that it is inherited from a parent page.

### Adding a new Group with write permission to the Home Page

Let's try to add a new group to the home page with write permission

1. Login to the home page
2. Switch in edit mode.
3. Select Page Settings.
4. Select the Right Mngmt Folder.
5. Click on Add a new User/Group.
6. Select the new Group.
7. Click ok
8. Modify the permission of the newly added group
9. Click OK or Apply

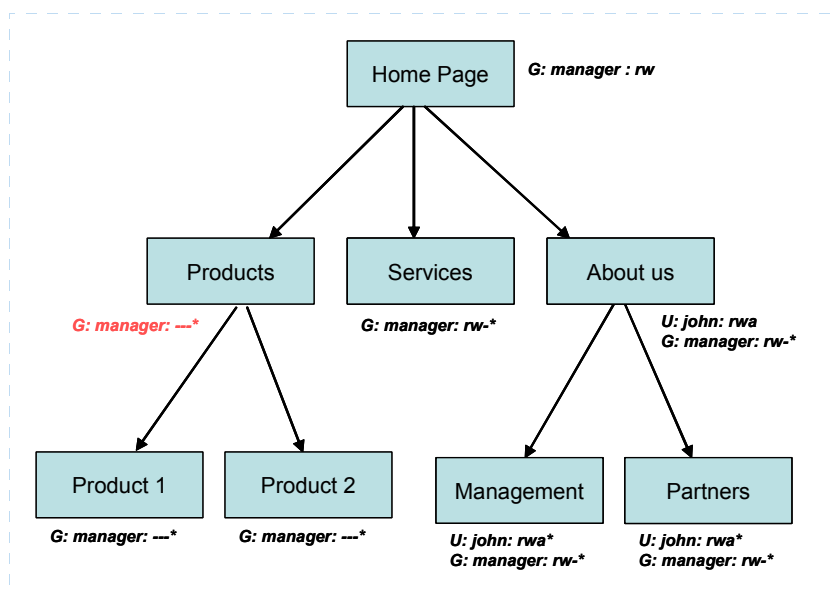


The group “manager” has been granted read and write access to the Home Page. These permissions are transmitted to the other pages of the website through inheritance mechanism.

### Removing an existing Group in the "Product" Section

Let's try now to remove an existing Group in the Product Section

1. Log into the product page
2. Switch in edit mode.
3. Select Page Settings.
4. Select the Right Mngmt Folder.
5. Select the Group.
6. Check if he is inherited or not
7. if his not inherited, click on remove
8. If inherited, modify all his permission setting on deny
9. Click OK or Apply

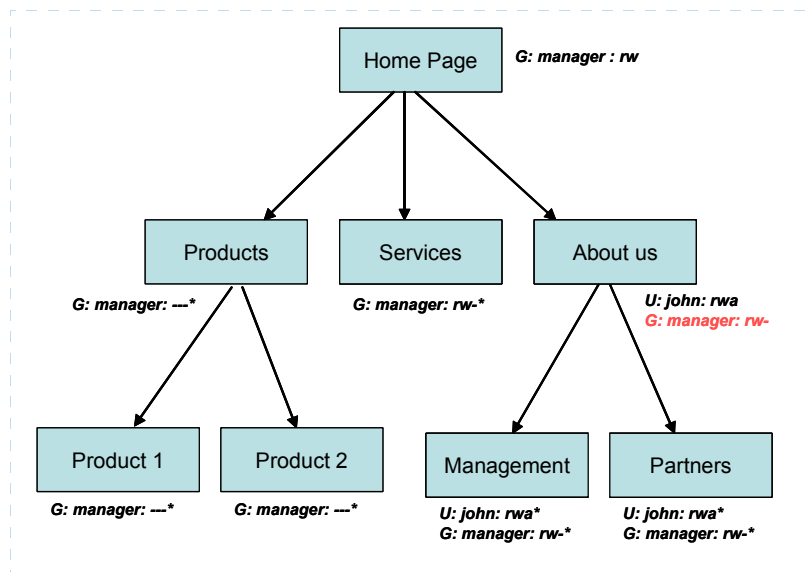


Now we can see that the group "employee" has been removed from the "Products" section, so he has no specific rights anymore to the whole section. As group "manager" inherits its permissions from the Home Page, we have denied all rights to the group at the "Products" level. In both cases, read and write permissions have been removed.

### Stopping inheritance in the "About us" Section

Let's try now to prevent any future inheritance for a complete section.

1. Log into the "About us" section.
2. Switch in edit mode.
3. Select Page Settings.
4. Select the Right Mngmt Folder.
5. Select the "Prevent all inherited permissions from parent object" checkbox
6. Click on: "Make local copy of all inherited permissions"
7. Click OK or Apply

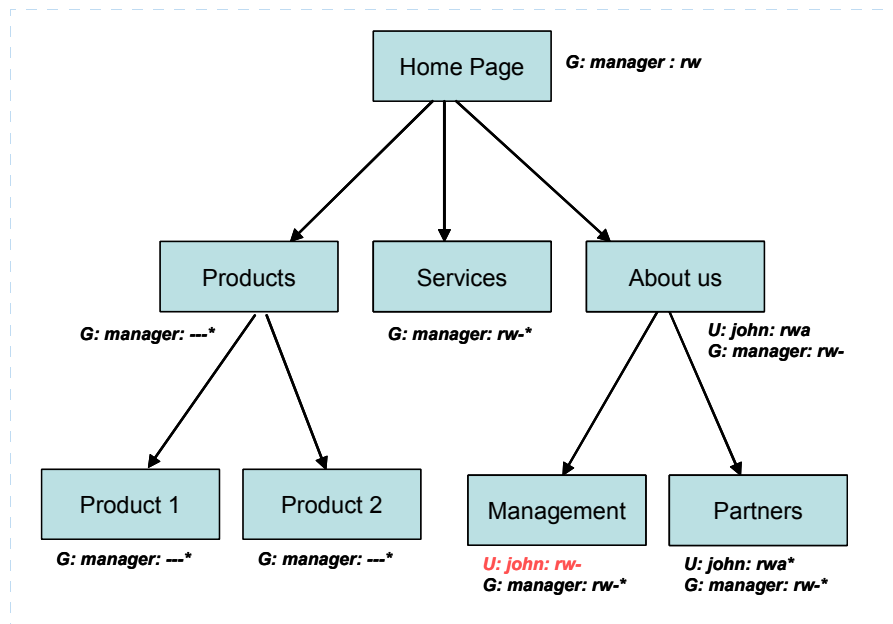


Here the inheritance has been stopped at the "About us" section. If we decide later to change or remove the permissions of the "manager" group at the Home Page level, it will not impact the "About us" section. In the same manner, if permissions for a new group or user are added at the Home Page level, it will not be transmitted to the "About us" page or below.

*Changing an inherited permission in the "Management" page.*

Let's see how we can remove administration rights of john to the "Management" page.

1. Log into the "Management" page.
2. Switch in edit mode.
3. Select Page Settings.
4. Select the Right Mngmt Folder.
5. Select the user john in the list
6. Select the "Copy the user/group permissions to the local object" checkbox
7. Set the administration right radio button to "Deny"
8. Click OK or Apply

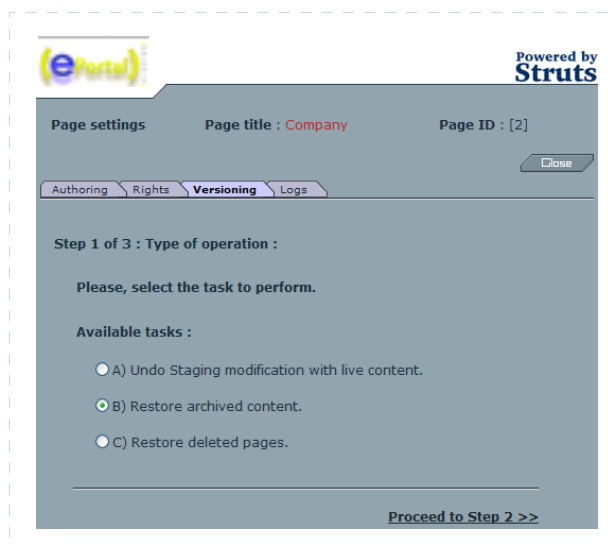


With this manipulation, we have removed the administration permission of john to the page "Management". If a new page is added below it, the permissions of the "Management" page will apply, and so john will not have administration rights to it either.

## 6.9. MANAGING ARCHIVED VERSIONS

All the content objects are automatically archived when you validate a content. A versioning interface is available to the Manager and lets him restore an archive of any content object.

Figure 6-45 : Versioning panel



When you access the versioning interface (page properties, versioning tab), three main options are available to you:

1. Undo Staging modification with live content
2. Restore archived content
3. Restore deleted pages

### *Undo Staging modification with live content (Synchronize with Live Content)*

This option deletes the current content in draft mode and replace it with the live content. Useful if you did a mistake and want to start your modifications back again starting from the existing content in live mode.

### *Restore Archives*

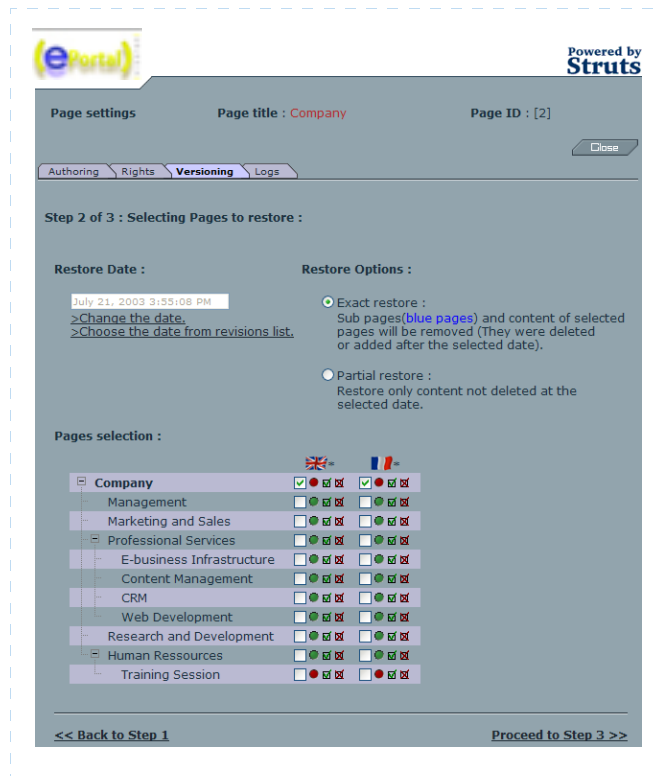
This is the more complex option. This process lets you restore a page, a section or a complete web site at any date. ePortal will also restore the correct structure of your site at the chosen date. For example if pages have moved several times or were deleted, the archiving service will restore them correctly at the right place in the ePortal structure.

### *Restore deleted pages*

This option is only available in the page properties interface or on a page field. It allows you to “undelete” pages that you suppressed by errors.

Steps 2: Selecting pages to restore:

Figure 6-46 : Versioning, step 2.



Several options exist and are explained below:

**Exact Restore:**

- Sub pages (blue pages) and content of selected pages will be removed (They were deleted or added after the selected date).

The exact restore will restore exactly the web page as it was at the chosen date. All the pages or content added afterwards will be deleted.

**Partial Restore:**

- Partial restore : Restore only content not deleted at the selected date.

The partial restore will only restore the content that existed at the selected date. All the other elements added afterwards will stay untouched. This option is practical if you want for example to restore some news that were deleted one month ago but you want to keep all the news added since.

Once you have chosen the restore method, you will have to chose a date.

Two options are here also possible:

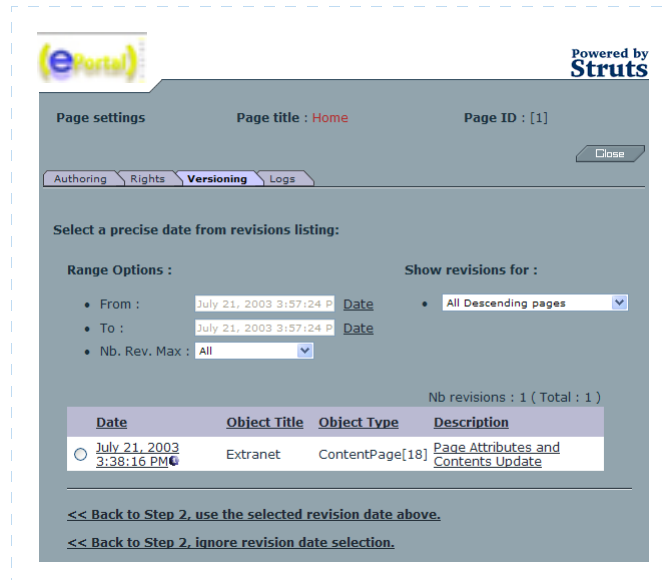
- 1) Manual input
- 2) Choose a date from the list of archives

The manual date input lets you chose any date you want. This option should be chose if you want to restore the site at a specific date (e.g. 31.12.2002) without using the revision list.



The second option let you choose a date from a list of all the archived versions. From this list you may see various options letting you choose the restore period and the scope of archives.

Figure 6-47 : Choose version to restore



Each archive can be restored and consulted immediately. Just click on the date of the version and you will get a preview of the page at the selected date. This will let you find the exact archive you want to restore.

*[Advanced Users]* By clicking on the description, you will see a list of all the fields that have been modified during the validation. You can then see field by field what was the content at the selected date.

Once you have selected a date from the archive list, you may come back to the previous screen. The selected date now appears in the interface. However, the sitemap list is not adjusted to the sitemap of the portal at the selected date.

Pages Selection:

You can now select the page(s) you want to restore. You can restore a single web page, a section (a group of pages) of a full web site.

Once done, you can move to the latest step of the wizard.

Step 3: Confirmation

Figure 6-48 : Validation, step 3: Confirmation



This step will ask you to confirm all the options you selected during the process. Do not forget that your content in draft mode will be suppressed and overridden by the archive without any way to restore it as it is not archived yet.

If you are ok with your settings, just click on the Apply or the OK button.

## 6.10. MANAGING LOGS

ePortal logs all the actions performed by the users. Each Content Manager may access to the logs of every content object where he has the right permissions (Admin rights).

The logs automatically consolidate all the actions performed on all the sub content object. So for example the home page logs will consolidate the logs of the whole ePortal site.

Warning: ePortal logs only archive the actions performed by the authors and the content managers. This may not be considered as a site usage log that trace all the clicks performed by the various users. For such logs please use the standard Apache logs or your application server logs. Check with your system administrator to know how to configure them.

Warning: Logs are by default limited to the 500 latest entries. The Site Administrator may increase the logs to an higher limit. However due to the current implementation of the logs, we do not suggest to logs more than 10'000 entries. This option will be improved in future releases.