



# **Project WebSynergy Milestone 3 Administration Guide**

Beta



Sun Microsystems, Inc.  
4150 Network Circle  
Santa Clara, CA 95054  
U.S.A.

Part No: 820-6364

Copyright 2008 Sun Microsystems, Inc. 4150 Network Circle, Santa Clara, CA 95054 U.S.A. All rights reserved.

Sun Microsystems, Inc. has intellectual property rights relating to technology embodied in the product that is described in this document. In particular, and without limitation, these intellectual property rights may include one or more U.S. patents or pending patent applications in the U.S. and in other countries.

U.S. Government Rights – Commercial software. Government users are subject to the Sun Microsystems, Inc. standard license agreement and applicable provisions of the FAR and its supplements.

This distribution may include materials developed by third parties.

Parts of the product may be derived from Berkeley BSD systems, licensed from the University of California. UNIX is a registered trademark in the U.S. and other countries, exclusively licensed through X/Open Company, Ltd.

Sun, Sun Microsystems, the Sun logo, the Solaris logo, the Java Coffee Cup logo, docs.sun.com, Java, and Solaris are trademarks or registered trademarks of Sun Microsystems, Inc. or its subsidiaries in the U.S. and other countries. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. in the U.S. and other countries. Products bearing SPARC trademarks are based upon an architecture developed by Sun Microsystems, Inc.

The OPEN LOOK and Sun<sup>TM</sup> Graphical User Interface was developed by Sun Microsystems, Inc. for its users and licensees. Sun acknowledges the pioneering efforts of Xerox in researching and developing the concept of visual or graphical user interfaces for the computer industry. Sun holds a non-exclusive license from Xerox to the Xerox Graphical User Interface, which license also covers Sun's licensees who implement OPEN LOOK GUIs and otherwise comply with Sun's written license agreements.

Products covered by and information contained in this publication are controlled by U.S. Export Control laws and may be subject to the export or import laws in other countries. Nuclear, missile, chemical or biological weapons or nuclear maritime end uses or end users, whether direct or indirect, are strictly prohibited. Export or reexport to countries subject to U.S. embargo or to entities identified on U.S. export exclusion lists, including, but not limited to, the denied persons and specially designated nationals lists is strictly prohibited.

DOCUMENTATION IS PROVIDED "AS IS" AND ALL EXPRESS OR IMPLIED CONDITIONS, REPRESENTATIONS AND WARRANTIES, INCLUDING ANY IMPLIED WARRANTY OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE OR NON-INFRINGEMENT, ARE DISCLAIMED, EXCEPT TO THE EXTENT THAT SUCH DISCLAIMERS ARE HELD TO BE LEGALLY INVALID.

---

Copyright 2008 Sun Microsystems, Inc. 4150 Network Circle, Santa Clara, CA 95054 U.S.A. Tous droits réservés.

Sun Microsystems, Inc. détient les droits de propriété intellectuelle relatifs à la technologie incorporée dans le produit qui est décrit dans ce document. En particulier, et ce sans limitation, ces droits de propriété intellectuelle peuvent inclure un ou plusieurs brevets américains ou des applications de brevet en attente aux Etats-Unis et dans d'autres pays.

Cette distribution peut comprendre des composants développés par des tierces personnes.

Certains composants de ce produit peuvent être dérivées du logiciel Berkeley BSD, licenciés par l'Université de Californie. UNIX est une marque déposée aux Etats-Unis et dans d'autres pays; elle est licenciée exclusivement par X/Open Company, Ltd.

Sun, Sun Microsystems, le logo Sun, le logo Solaris, le logo Java Coffee Cup, docs.sun.com, Java et Solaris sont des marques de fabrique ou des marques déposées de Sun Microsystems, Inc., ou ses filiales, aux Etats-Unis et dans d'autres pays. Toutes les marques SPARC sont utilisées sous licence et sont des marques de fabrique ou des marques déposées de SPARC International, Inc. aux Etats-Unis et dans d'autres pays. Les produits portant les marques SPARC sont basés sur une architecture développée par Sun Microsystems, Inc.

L'interface d'utilisation graphique OPEN LOOK et Sun a été développée par Sun Microsystems, Inc. pour ses utilisateurs et licenciés. Sun reconnaît les efforts de pionniers de Xerox pour la recherche et le développement du concept des interfaces d'utilisation visuelle ou graphique pour l'industrie de l'informatique. Sun détient une licence non exclusive de Xerox sur l'interface d'utilisation graphique Xerox, cette licence couvrant également les licenciés de Sun qui mettent en place l'interface d'utilisation graphique OPEN LOOK et qui, en outre, se conforment aux licences écrites de Sun.

Les produits qui font l'objet de cette publication et les informations qu'il contient sont régis par la législation américaine en matière de contrôle des exportations et peuvent être soumis au droit d'autres pays dans le domaine des exportations et importations. Les utilisations finales, ou utilisateurs finaux, pour des armes nucléaires, des missiles, des armes chimiques ou biologiques ou pour le nucléaire maritime, directement ou indirectement, sont strictement interdites. Les exportations ou réexportations vers des pays sous embargo des Etats-Unis, ou vers des entités figurant sur les listes d'exclusion d'exportation américaines, y compris, mais de manière non exclusive, la liste de personnes qui font objet d'un ordre de ne pas participer, d'une façon directe ou indirecte, aux exportations des produits ou des services qui sont régis par la législation américaine en matière de contrôle des exportations et la liste de ressortissants spécifiquement désignés, sont rigoureusement interdites.

LA DOCUMENTATION EST FOURNIE "EN L'ETAT" ET TOUTES AUTRES CONDITIONS, DECLARATIONS ET GARANTIES EXPRESSES OU TACITES SONT FORMELLEMENT EXCLUES, DANS LA MESURE AUTORISEE PAR LA LOI APPLICABLE, Y COMPRIS NOTAMMENT TOUTE GARANTIE IMPLICITE RELATIVE A LA QUALITE MARCHANDE, A L'APTITUDE A UNE UTILISATION PARTICULIERE OU A L'ABSENCE DE CONTREFACON.

# Contents

---

<b>1 Administration Overview .....</b>	<b>7</b>
WebSynergy Terminology .....	7
Using the Welcome Menu for Administration Tasks .....	8
▼ To use the Welcome Menu .....	8
Control Panel .....	9
My Account .....	11
Add Application .....	12
Layout Template .....	13
Manage Pages .....	14
Toggle Edit Controls .....	14
My Places .....	15
WebSynergy Features and Use Cases .....	17
A Use Case for Friends Portlet .....	18
A Use Case for the Expense Report Portlet .....	21
A Use Case for Delegated Administration – <i>Delegating Portlets to Users</i> .....	26
A Use Case for Presence Feature .....	31
A Use Case for Enterprise Social Networking .....	32
Where To Go Next? .....	34
 <b>2 Customizing Project WebSynergy .....</b>	 <b>35</b>
Branding and Site Identity .....	35
▼ To change the Banner Logo .....	35
▼ To change the Address Bar and Browser tab Icons .....	36
Friendly URLs .....	37
▼ To change the Friendly URL of a Page .....	37
Virtual Hosting .....	40
Comparison .....	40
Virtual Hosting (ASP) .....	41

- Virtual Hosting (Communities) ..... 41
- Site Layout and Navigation ..... 41
  - ▼ To change the Site Layout ..... 41
  - ▼ To create a new Layout ..... 42
- Changing the Page Theme ..... 43
- Using Bundled WebSynergy Portlets ..... 44
  - ▼ To use Bundled WebSynergy Portlets ..... 45
- Customizing the Look and Feel and Configuration of a Portlet ..... 45
  - Changing the Name of a Portlet ..... 45
  - Customizing the Look and Feel and Configuration of a Portlet ..... 47
- 3 Administering Roles and Permissions ..... 51**
  - Administration Roles ..... 51
    - Using the Control Panel to Administer Roles and Permissions ..... 51
  - User Groups ..... 53
    - Defining User Groups ..... 53
    - Assigning Users to User Groups ..... 55
  - Communities ..... 57
    - Defining Communities ..... 57
    - Assigning Users to Communities ..... 58
  - Organizations ..... 60
    - Defining Organizations ..... 61
    - Creating Users Under Organizations ..... 66
  - Users and User Roles ..... 69
    - What Different User Roles Mean? ..... 69
    - Defining User Roles ..... 69
  - Plugins ..... 73
    - What Are Plugins? ..... 73
    - Enabling Plugins ..... 73
    - Working With Plugin Permissions ..... 74
- 4 Administering Content Management System ..... 77**
  - CMS in WebSynergy ..... 77
    - Document Library Portlet ..... 78
    - Document Library Display Portlet ..... 82

Image Gallery Portlet .....	83
Journal Portlets .....	89
Journal Articles Portlet .....	108
Journal Content Portlet .....	108
Journal Content Search Portlet .....	108
Asset Publisher Portlet .....	108
Breadcrumb Portlet .....	121
Categories Navigation Portlet .....	121
Navigation Portlet .....	122
Nested Portlets Portlet .....	122
Recent Documents Portlet .....	122
Site Map Portlet .....	122
Tags Admin Portlet .....	122
XSL Content Portlet .....	124
Workflow Portlet .....	124
▼ To add a Workflow Definition .....	124
▼ To Create a Workflow Instance .....	125
Accessing a Workflow Instance .....	127
<b>5 Web Services for Remote Portlets .....</b>	<b>129</b>
WSRP for Project WebSynergy .....	129
Adding WSRP Portlets to the Page .....	129
WSRP Administration .....	130
<b>6 System Maintenance .....</b>	<b>139</b>
Database Administration .....	139
WebSynergy Database Tables .....	139
Backups and Restores .....	139
Backing Up the System .....	139
Restoring From Backup .....	139
Monitoring and Logging .....	140
<b>7 Performance Tuning .....</b>	<b>141</b>
Database .....	141

- Application Server ..... 141
- Clustering ..... 141
- Memory ..... 142
- Properties File ..... 142
- Servlet Filters ..... 142
- Portlets ..... 142
- Java Environment ..... 142
- Portal Extensions ..... 142
  
- 8 Advanced Customization ..... 143**
  - Creating Custom Portal Bundles ..... 143
  - Implementing Services ..... 143
  
- 9 Troubleshooting ..... 145**
  - Troubleshooting Tips ..... 145
  - Troubleshooting FAQs ..... 145

# Administration Overview

Need to add an introduction.

- “WebSynergy Terminology” on page 7
- “Using the Welcome Menu for Administration Tasks” on page 8
- “WebSynergy Features and Use Cases” on page 17
- “Where To Go Next?” on page 34
- “A Use Case for Enterprise Social Networking” on page 32

## WebSynergy Terminology

To be done.

TABLE 1-1 WebSynergy Terms

Term	Meaning
Portlet	Portlets are pluggable user interface software components that are managed and displayed in a web portal. Typically, a portal page is displays as a collection of non-overlapping portlet windows, where each portlet window displays a portlet.  WebSynergy portlets confirm to JSR286 standards.
Instanciable Portlet	If you can add many instances of a portlet to your page, the portlet is called an instanciable portlet.
Non-instanciable Portlet	If you can add just one instance of a portlet to your page, the portlet is called a it is a non-instanciable portlet.

TABLE 1-1 WebSynergy Terms (Continued)

Public Page and Private Page	<p>Any user account on Project WebSynergy contains a Public Page and a Private Page.</p> <p>The page for the user account which can be accessed by a guest user is called as <i>Public Page</i>.</p> <p>The page which you can access only when you login to the user account is called as <i>Private Page</i>.</p>
Widget	<p>A widget is a portlet, with the exception that unlike portlets it is not based on Java, and created using some other programming language such as PHP.</p>
Friendly URLs	<p>The modifiable part of the url for the private page of an user account.</p>
Theme	<p>A look and feel setting which can be applied to a page.</p>
Layout Template	<p>A display scheme which can be applied to the portal.</p>
Guest	<p>A user without a WebSynergy account.</p>
User	<p>A user with a WebSynergy account.</p>
User Group	<p>Arbitrary groupings of users.</p>
Communities	<p>Collections of users who have a common interest.</p>
Organizations	<p>Organizations are hierarchical collections of Users. They are one of the two types of portal resources that can have pages.</p>
User Roles	<p>Regular, Community, and Organization</p>
Delegation Roles	<p>Guest, Power User, User, and Administrator</p>

# Using the Welcome Menu for Administration Tasks

To be done.

## ▼ To use the Welcome Menu

- 1 Login to WebSynergy as Admin User.
- 2 Navigate to the Welcome menu, and click on the menu item that you need to access.  
*Home, Control Panel, My Account, Sign Out, Add Application, Layout Template, Manage Pages, Toggle Edit Controls, and My Places* are the items which can be accessed from the welcome menu for the admin user.



<a href="#">“Control Panel” on page 9</a>	To apply control settings
<a href="#">“My Account” on page 11</a>	To apply account settings
<a href="#">“Add Application” on page 12</a>	To add portlets and widgets to your page
<a href="#">“Layout Template” on page 13</a>	To change the layout template
<a href="#">“Manage Pages” on page 14</a>	To specify a friendly URL to your public and private pages
<a href="#">“Toggle Edit Controls” on page 14</a>	To toggle edit controls of the portlets on your page
<a href="#">“My Places” on page 15</a>	To navigate to public and private pages associated with your account

## Control Panel

You can use the Control Panel to change the settings applied to *My Account*, *Content*, *Portal*, and *Server settings*. Select *Control Panel* from the main menu. The following page appears:

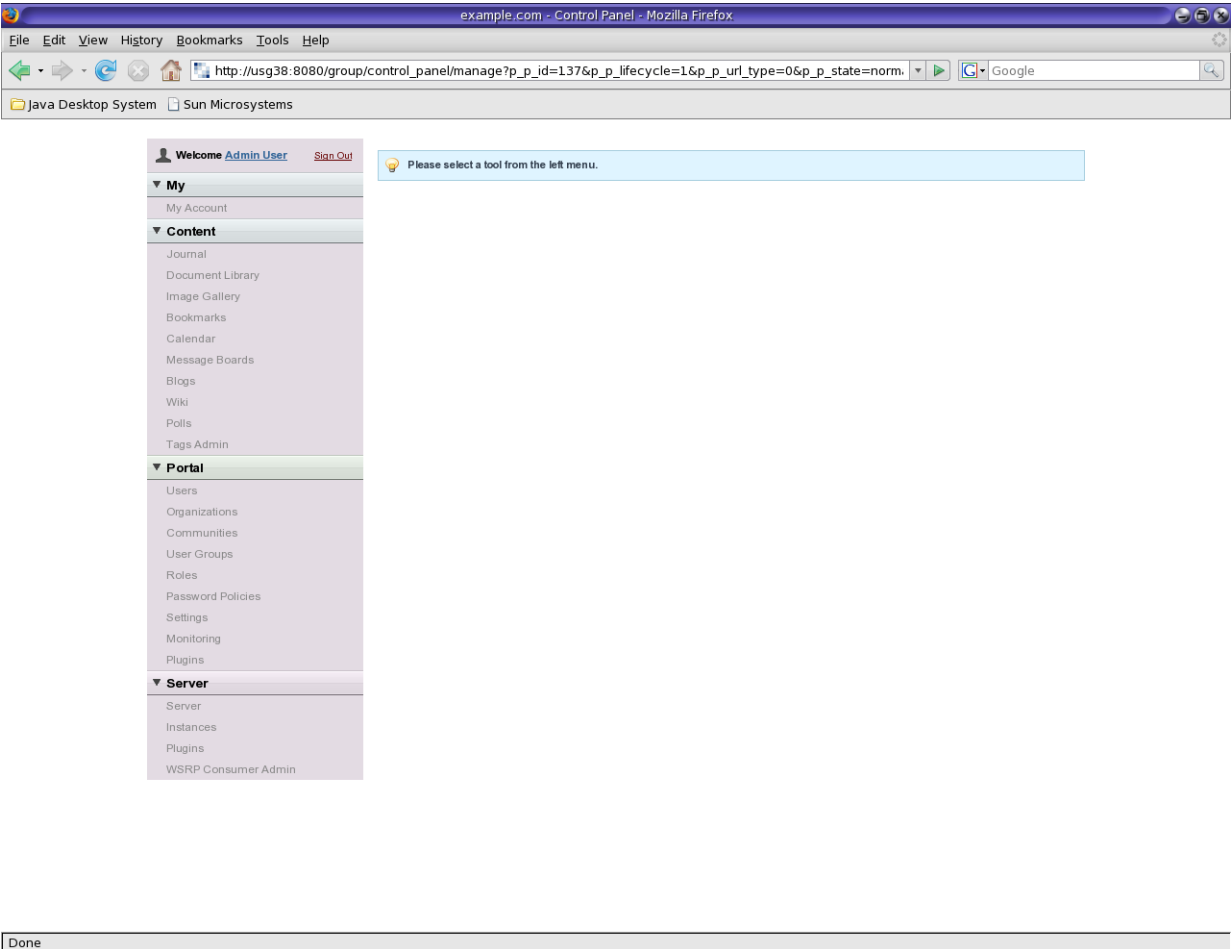


FIGURE 1-1 Control Panel

You can select a tool from the left menu to apply settings to it. For example, click on Server under the Server menu.

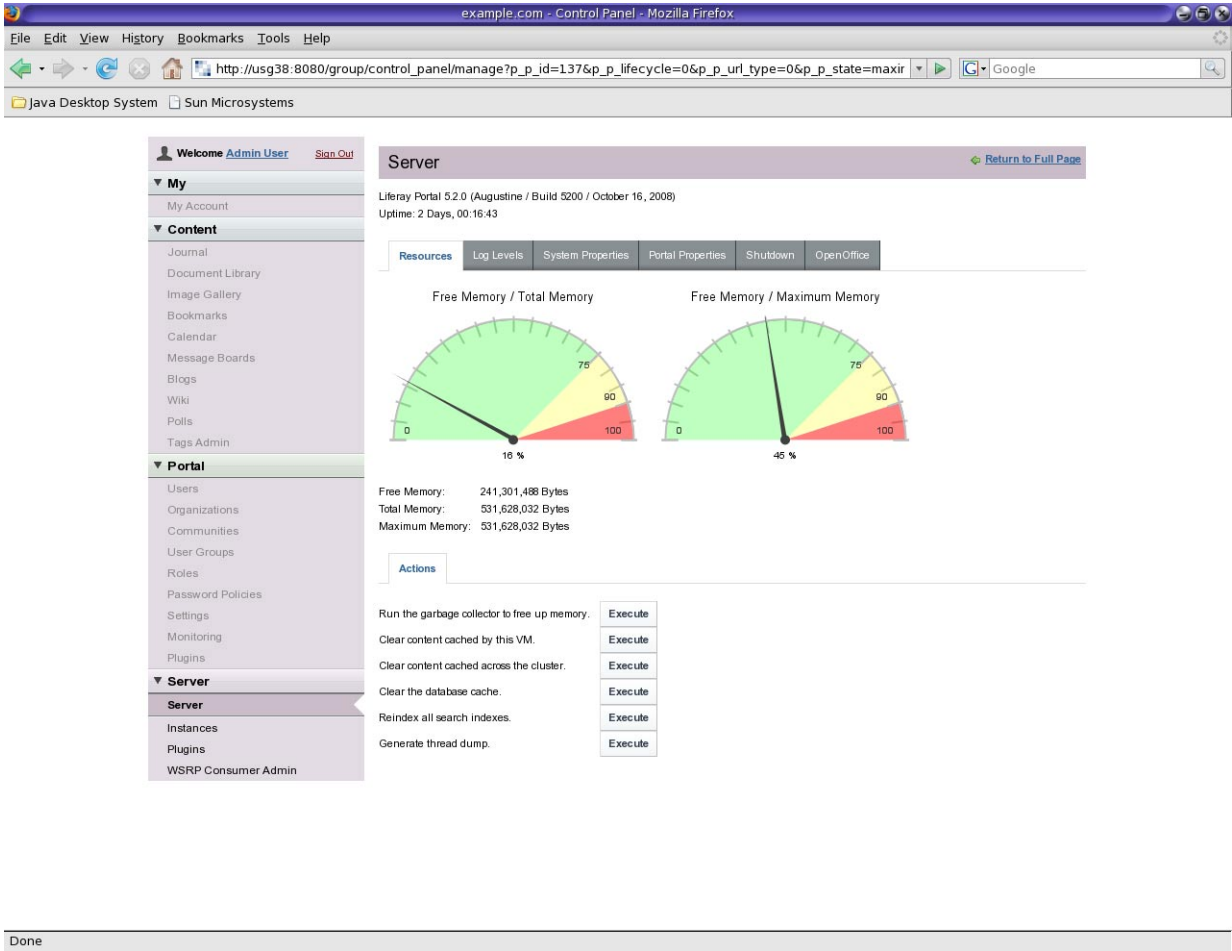


FIGURE 1-2 Control Panel

You can perform a number of server maintenance activities from this page.

Similarly, you can apply different kind of settings by using the Control Panel. You can click on the Welcome User and Sign Out links in the top left corner of the page, respectively to return to the main page and to sign-out of WebSynergy.

## My Account

To access the *My Account* page, you can click on 'My Account' for the *Control Panel* window or you can choose it from the welcome menu.

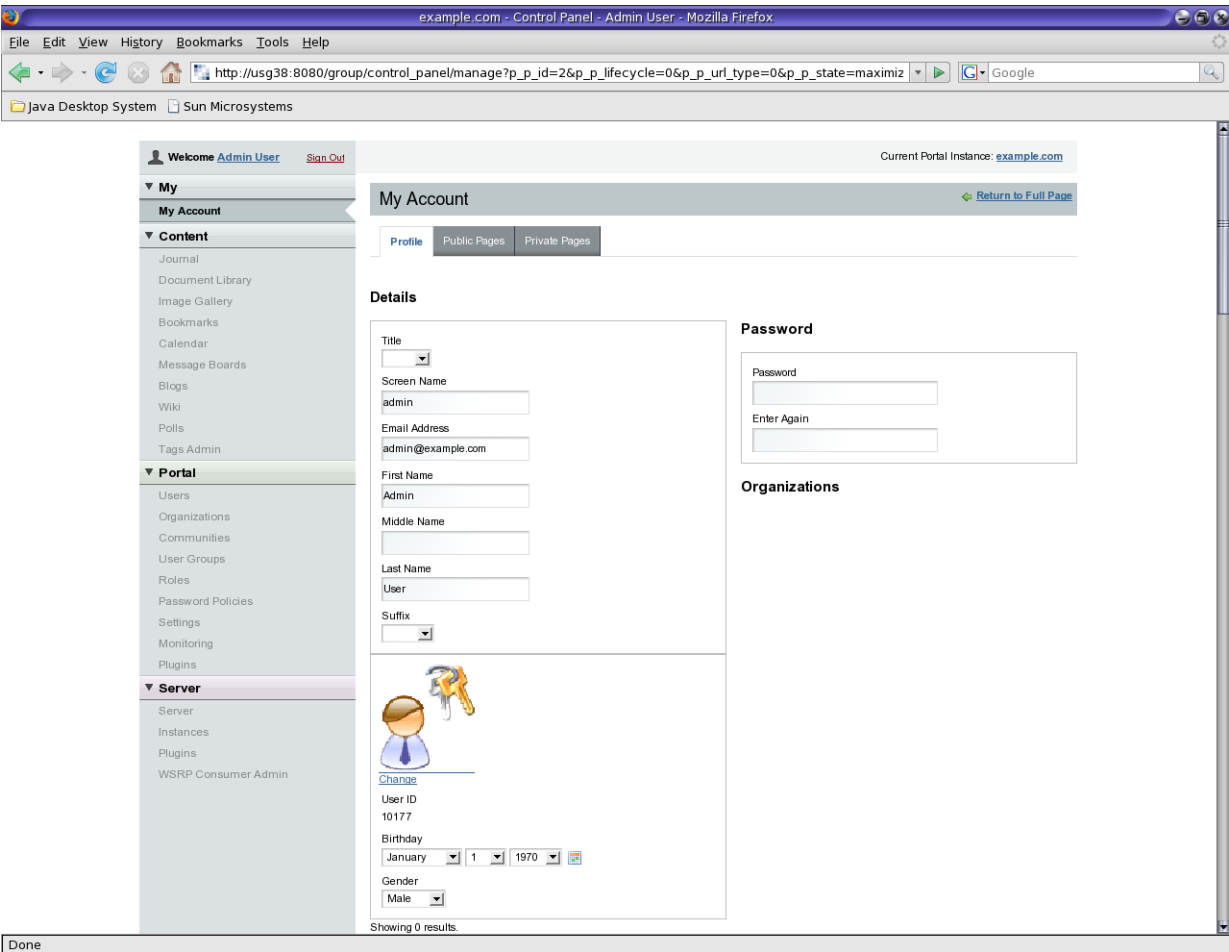


FIGURE 1-3 My Account

From this page, you can view and make changes to Public Pages and Private Pages associated with your account. Also, you can view and make changes to your profile.

## Add Application

You can add a portlet or a widget to your page by clicking Add Application from the welcome menu.

# Layout Template

Click on *Layout Template* from the Welcome Menu.

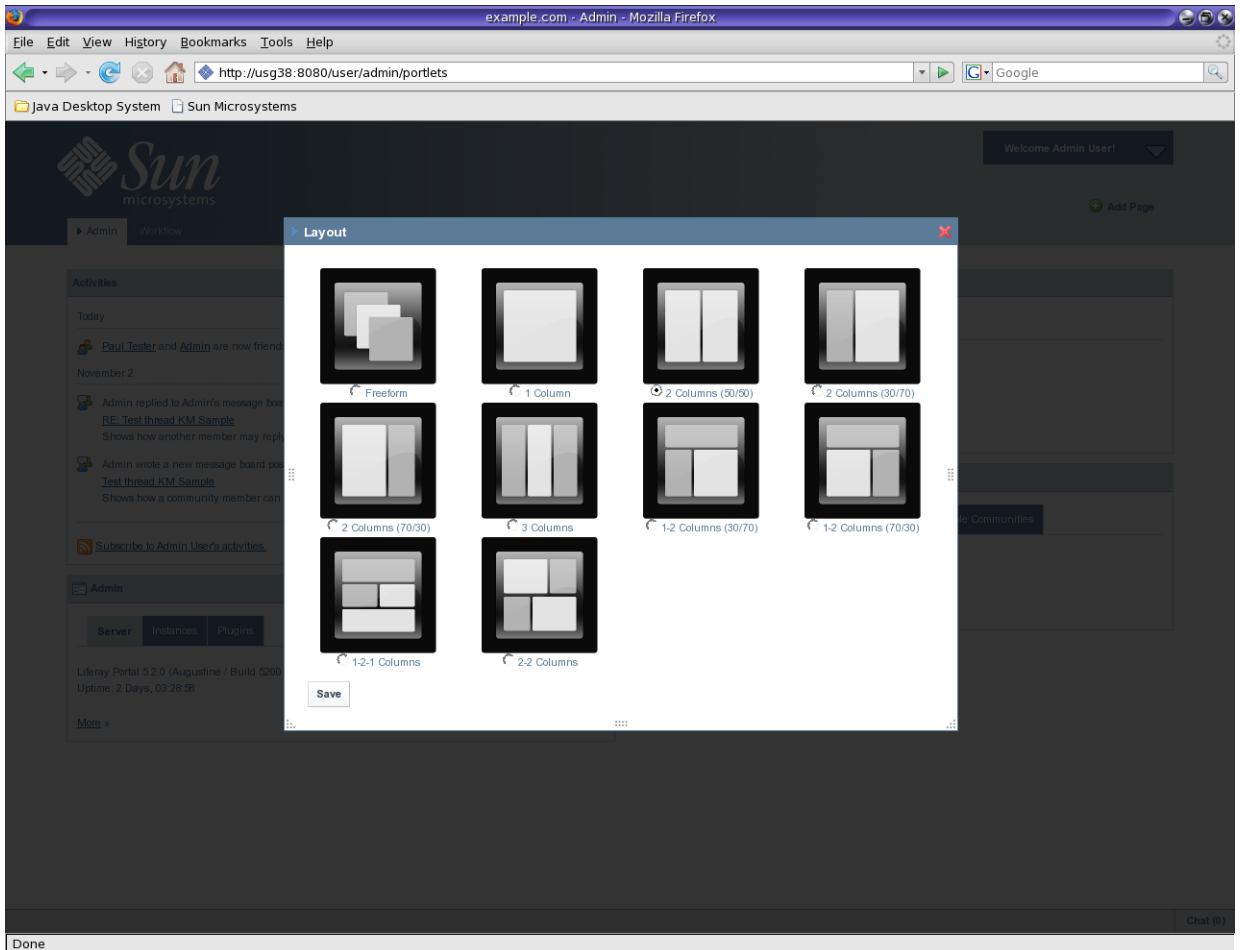


FIGURE 1-4 Layout Template

The *Layout* window appears. The *2 Column (50/50)* is the default layout. You can select the radio button for the Layout of your choice and click *Save* to apply the layout for your account.

# Manage Pages

You can use Manage Pages from the Welcome Menu to specify a Friendly URL and apply other settings to a Public Page or a Private Page associated with your account.

You can refer the section on [Friendly URLs](#).

# Toggle Edit Controls

You can toggle edit controls off and on by clicking on *Toggle Edit Controls* from the Welcome Menu.

You can notice that edit controls are on when Toggle Edit Controls is on.

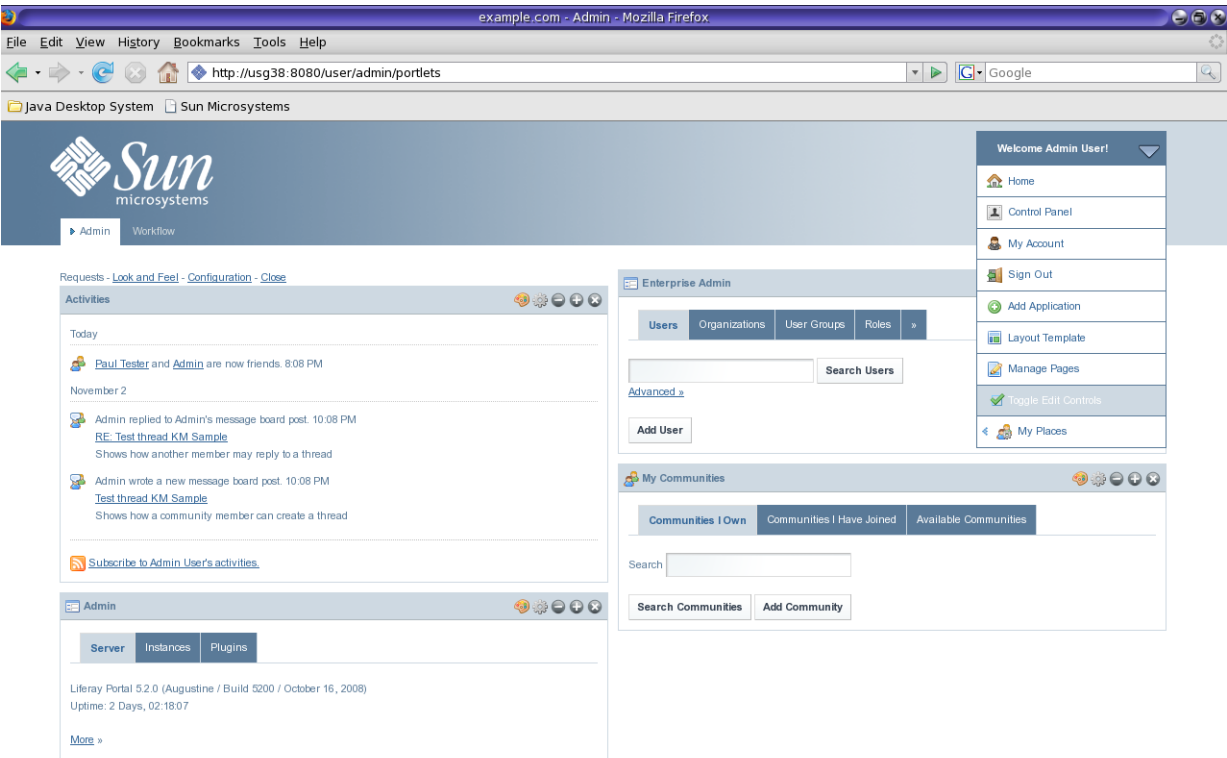


FIGURE 1-5 Toggle Edit Controls

The edit controls for the portlets on your page are off when 'Toggle Edit Controls' is off.

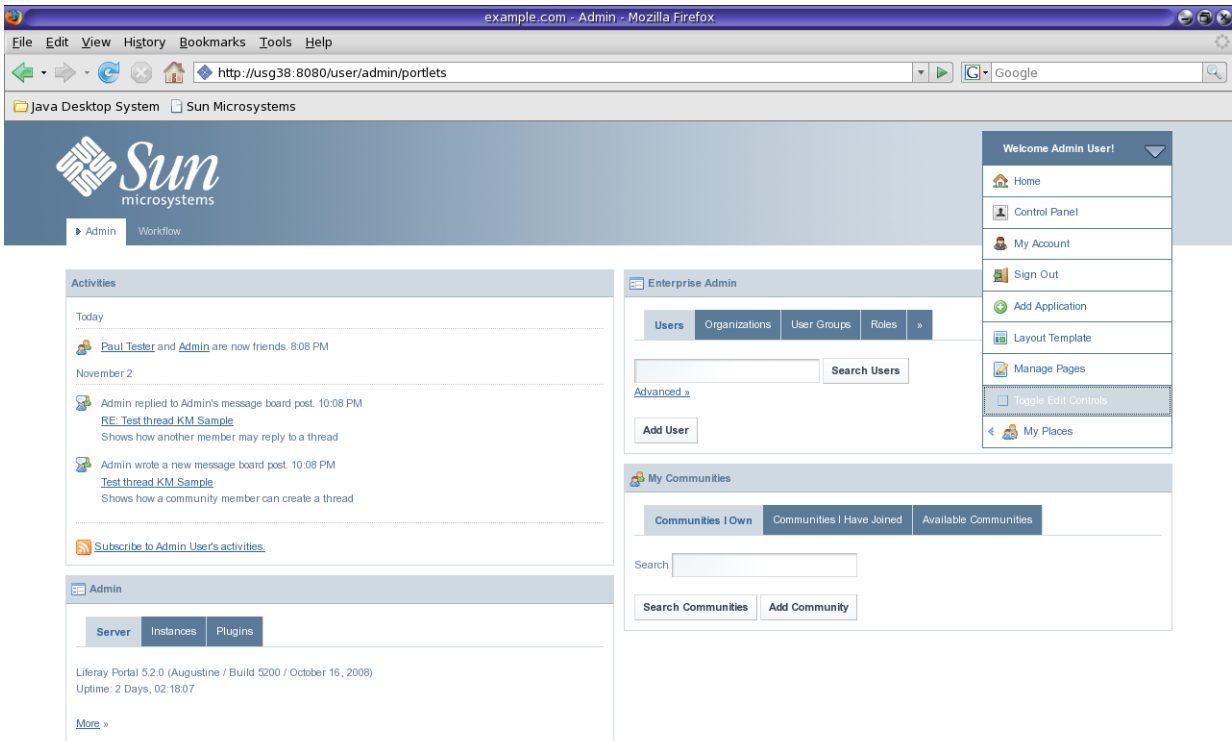


FIGURE 1-6 Toggle Edit Controls

# My Places

You can select *My Places* from the welcome menu to navigate to all the Public and Private Pages associated with your account. When you click on My Places, the page you are on is highlighted in the menu appearing.

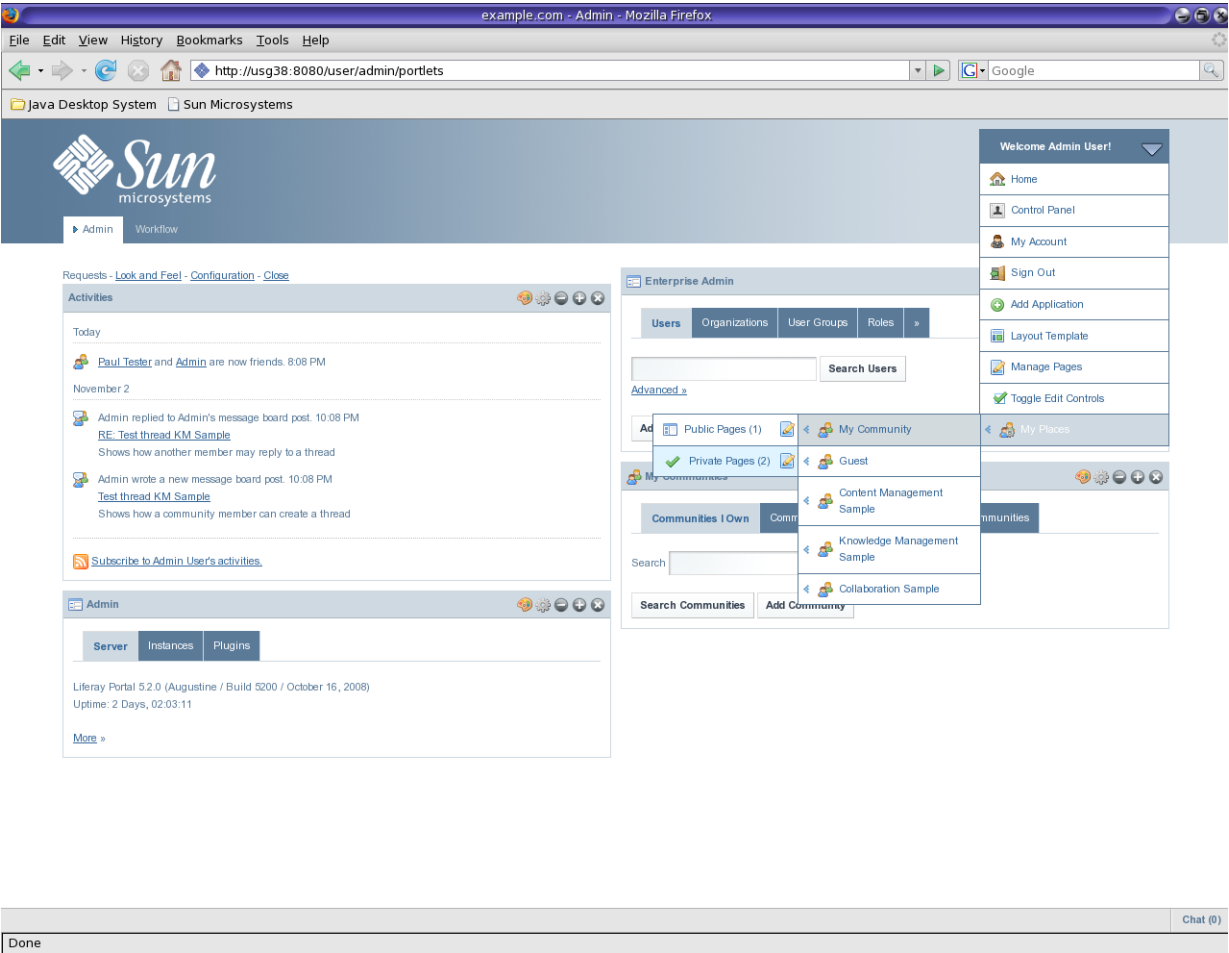


FIGURE 1-7 My Places menu

**Note** – A Public Page is a page which can be viewed the Guest user i.e., the Public Page can be viewed without the need to login. Private Pages can be viewed only after you login. For example, to view the public page of the admin user, click on the *View admin's public page* link. To view admin's private pages, you need to login as the admin user.



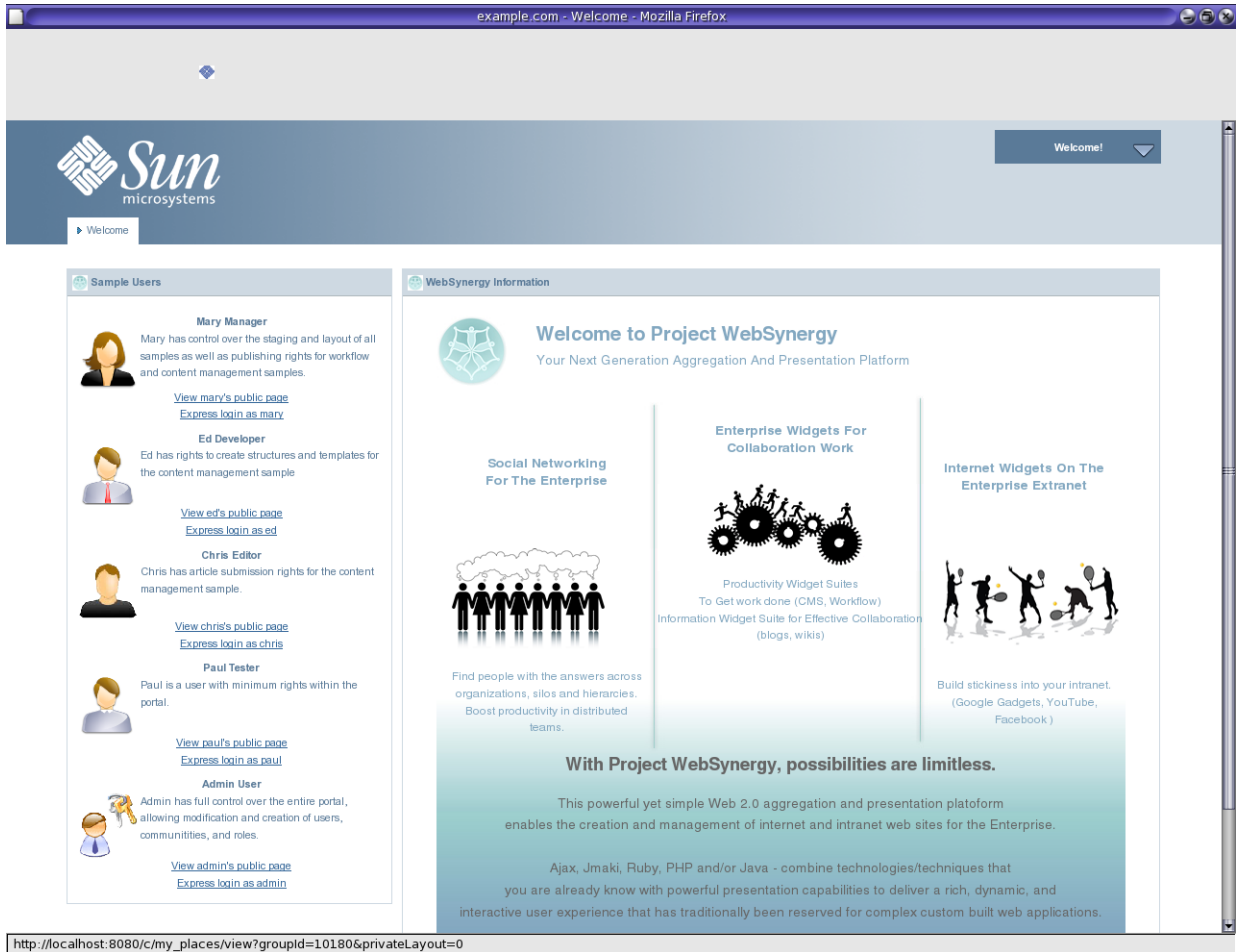


FIGURE 1-8 My Places menu

## WebSynergy Features and Use Cases

To be done.

- “A Use Case for Friends Portlet” on page 18
- “A Use Case for the Expense Report Portlet” on page 21
- “A Use Case for Delegated Administration – *Delegating Portlets to Users*” on page 26
- “A Use Case for Presence Feature” on page 31

# A Use Case for Friends Portlet

The following is a use case for adding a friend to the Friends Portlet.

You can view the list of your friends and their profiles on the *Friends* widget. There is no easy and straight forward way of adding friends to the Friends widget.

This use case explains a scenario where you make use of the *Search and Invite Friends* widgets and the *Requests* widget to add a friend to the Friends widget.

## ▼ To Add a Friend

**1 login to WebSynergy as Paul.**

The Friends widget is displaying *Mary manager*, *Ed Developer*, and *Chris Editor* as the friends for *Paul Tester*.

**2 Add the Search and Invite Friends widget to your page.**

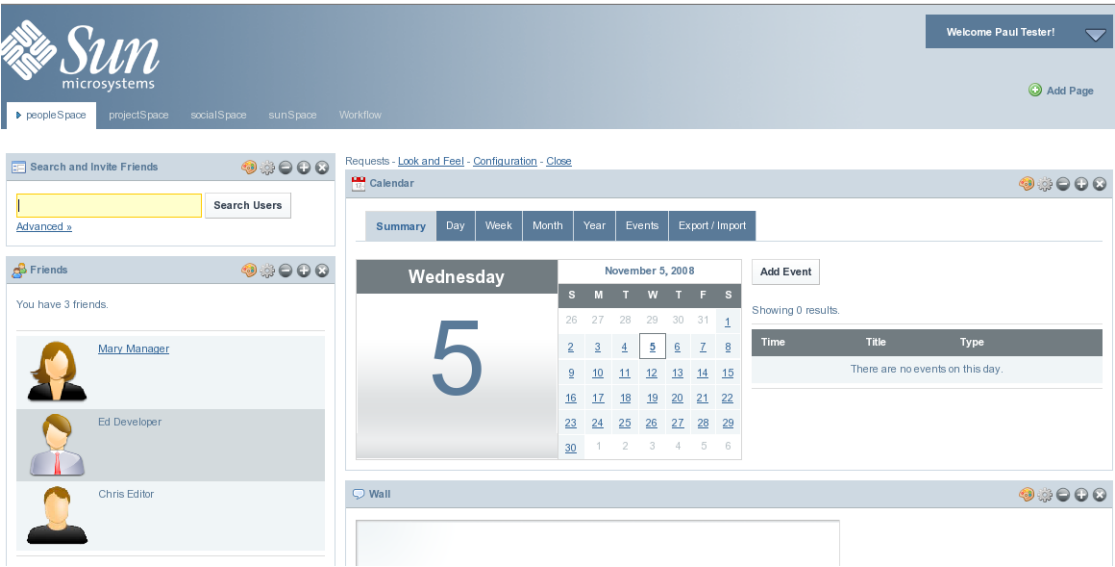


FIGURE 1-9 To Add a Friend

**3 Click on the Advanced link.**

Specify the search strings which need to be included in you search. For example, type 'example' in the Email Address field to search for users with email id containing the text 'example'.

**Search and Invite Friends** [Return to Full Page](#)

Match **All** of the following fields:

First Name  Middle Name  Last Name

Screen Name  Email Address  **example** Yes

**Search Users**

[Basic](#)  
Showing 1 - 5 of 7 results.

Items per Page **5** Page **1** of 2 [First](#) [Previous](#) [Next](#) [Last](#)

First Name	Last Name	Screen Name	Job Title
Admin	User	admin	Administrator
Chris	Editor	chris	Editor
Ed	Developer	ed	Developer
Jon	Smith	jon	Sales Representative
Mary	Manager	mary	Manager

**FIGURE 1-10** To Add a Friend

You can notice that Chris, Ed, and Mary are already friends for Paul, and there is no Add as Friend link against them.

**4 Select a user and click Add as Friend link against the user.**

In our example, Click *Add as Friend* against the *Admin* user. You get a message saying 'Your request is processed successfully'.

**5 Logout and login again as the user selected as friend.**

In our example, login as Admin user.

**6 Add the Requests portlet to your page.**

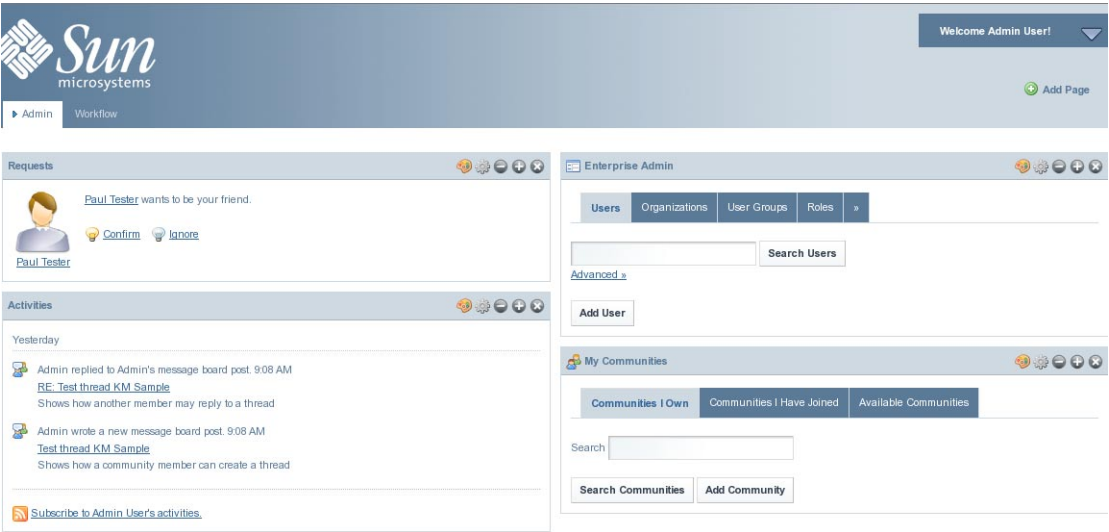


FIGURE 1–11 To Add a Friend

7 Click on the Confirm link.

You can see on the *Activities* portlet that *Paul Tester and Admin are now friends*.

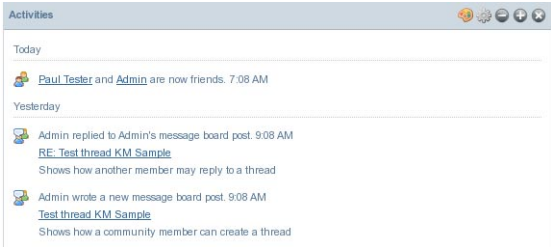


FIGURE 1–12 To Add a Friend

The Friends portlet on the Paul Testers page includes Admin as among the friends for Paul.

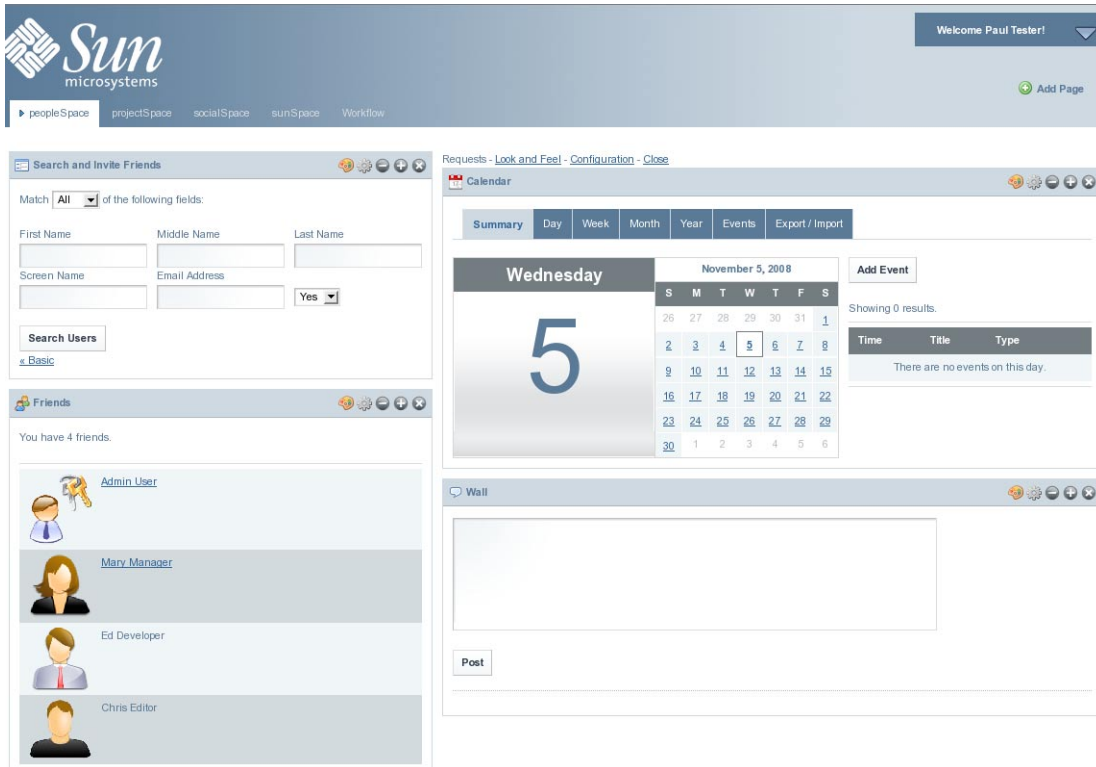


FIGURE 1-13 To Add a Friend

## A Use Case for the Expense Report Portlet

The Expense Report widget models the Expenses Reports Reclaim process that is typical in any large organization. An Expense Report is a report comprising details of the expenses (like Business Travel, Relocation, Broadband Bills Claim) incurred by an employee that can be reclaimed from the organization.

An Expense Report created by an employee can be approved by his or her superior. Users available to the system created using the *Enterprise Admin Portlet* are mapped to either the Employee role or the Manager role. Let us consider the following Use Case:

Paul Tester (Employee) submits an Expense Report for a business trip. Mary Manager (Manager) verifies and approves the Expense Report. The following is the process involved:

1. Paul Tester submits an Expense Report. Paul performs the following steps to submit his report:
  - a. Paul selects the expense category, and enters an expense amount and description and saves the report. The system assigns a unique expense ID to the report.

- b. Paul reviews the report summary.
  - c. Paul submits the saved report for approval by his manager.
- 2. Mary Manager verifies the details of the Expense Report. She can either approve or reject the report.
  - [“To Submit an Expense Report” on page 22](#)
  - [“To Approve an Expense Report” on page 24](#)

▼ **To Submit an Expense Report**

- 1 **Login to WebSynergy as Paul Tester.**
- 2 **Add the Expense Report Portlet to your page.**



FIGURE 1–14 To Submit an Expense Report

- 3 **Click on the Add a New Expense Report link.**
- 4 **Enter a description for the Expense Report.**  
Enter values for *Item Description*, *Amount*, and *Date* fields. Click on *Add Item* to add a new row.

Expense Report

New Expense Report for Paul Tester (208321)

Approver: **Mary Manager**

Description: **My business trip to Santa Clara**

Items

**Add Item**

Item Description	Amount(USD)	Date (MM/DD/YY)
Trips- Airfare	3000	11/06/2008
Trip - Hotel Room Charges	1500	11/06/2008
Trip- Auto, Rental, Parking	100	11/06/2008
Entertainment Meals/Meeting with Customer	150	11/06/2008
Employee Incentives	1000	11/06/2008
Mobile Phone Charges	50	11/06/2008

**Save Report** **Submit Report**

[Cancel](#)

FIGURE 1–15 To Submit an Expense Report

**5 Click on Save Report.**

**6 Click on the Go back to Report Summary link to view the report summary.**

The summary page displays the *Report No.*, *Description*, *Submission Date*, *Amount*, and the *Status*.

Expense Report

[Add a New Expense Report](#)

List of Saved/Submitted Expense Reports Raised by you

Click on the report to view details or to Submit Saved Report

Report No.	Description	Submission Date(MM-DD-YY)	Amount (USD)	Status
<a href="#">100000</a>	My business trip to Santa Clara	10-6-2008	5800.0	Saved

FIGURE 1–16 To Submit an Expense Report

Click on the report ID. The report is enabled for submit.



FIGURE 1–17 To Submit an Expense Report

7 Click Submit Report.

The report is submitted for approval. Status of the report changes to *Pending*.



FIGURE 1–18 To Submit an Expense Report

▼ To Approve an Expense Report

- 1 Login to WebSynergy as Mary Manager.
- 2 Add the Expense Report Portlet to your page.

The report submitted by Paul is displayed under the *List/History of Expense Reports Raised by Reportees*.



Expense Report

[Add a New Expense Report](#)

List of Saved/Submitted Expense Reports Raised by you

Click on the report to view details or to Submit Saved Report

Report No. ▲	Description	Submission Date (MM-DD-YY)	Amount (USD)	Status
No records found.				

List/History of Expense Reports Raised by Reportees

Click on the report to view details and to approve/reject

Report No. ▲	Description	Employee Name	Submission Date (MM-DD-YY)	Amount (USD)	Status
<a href="#">100000</a>	My business trip to Santa Clara	Paul Tester	10-6-2008	5800.0	Pending

FIGURE 1–19 To Approve an Expense Report

### 3 Click on the report ID.

Details of the Submitter are displayed. Also, the *Approve Report* and *Reject Report* buttons appear.

Expense Report

[Add a New Expense Report](#)

List of Saved/Submitted Expense Reports Raised by you

Click on the report to view details or to Submit Saved Report

Report No. ▲	Description	Submission Date (MM-DD-YY)	Amount (USD)	Status
No records found.				

List/History of Expense Reports Raised by Reportees

Click on the report to view details and to approve/reject

Report No. ▲	Description	Employee Name	Submission Date (MM-DD-YY)	Amount (USD)	Status
<a href="#">100000</a>	My business trip to Santa Clara	Paul Tester	10-6-2008	5800.0	Pending

[Add a New Expense Report](#)

Details for Report No. 100000

Submitter: Paul Tester(208321) Approver: Mary Manager

[Approve Report](#) [Reject Report](#)

FIGURE 1–20 To Approve an Expense Report

### 4 Click on the Approve Report button to approve the report.

## A Use Case for Delegated Administration – *Delegating Portlets to Users*

A User has a number of Roles associated to him. Each portlet is also associated with one or more Roles. A user can access only the portlets which are associated with his roles. If the administrator (Admin User) assigns a new role to a user, all the portlets which are associated with the role are accessible by the user. If the administrator creates a new role and associates it with some portlets, those portlets will be accessible by any of the users who have this new role assigned to them. Like this, roles can be used to delegate portlets to users.

A portlet has one or more of the four roles (Guest, Power User, User, and Administrator) by default. You can associate more roles to a portlet. For example, you can add 'Power User' and 'User' roles to a portlet which has 'Guest' role associated with it. In this case, any user with either 'Guest', 'Power User', or 'User' role will be able to access the portlet.

Consider the following scenario:

The user 'Chris Editor' has 'Power User' and 'User' Roles assigned to him. He can access only the portlets with Power User and User roles. The 'Admin portlet' has only the 'Administrator' role assigned to it, and only the 'Admin User' can access that portlet. Creating a new role named 'DelegatedAdmin' and assigning it to the Admin portlet. Then, assign the DelegatedAdmin role to Chris Editor. Now, Chris Editor has Power User, User, and DelegatedAdmin roles. Chris Editor becomes the delegated administrator for the Admin Portlet. Chris Editor can access the Admin Portlet.

This following are the steps involved:

1. Login to WebSynergy as Admin User and use the Enterprise Admin portlet to create a new role named 'DelegatedAdmin'.
2. Add the DelegatedAdmin role to the Admin Portlet.
3. Assign the DelegatedAdmin role to Chris Editor.
4. Login to WebSynergy as Chris Editor. You can access the Admin Portlet.

The following are the tasks involved:

1. [“To Create a new Role” on page 27](#)
2. [“To Assign a new Role to a Portlet” on page 27](#)
3. [“To Assign a new Role to a User” on page 29](#)
4. [“To Access a Portlet” on page 30](#)

## ▼ To Create a new Role

- 1 Login to WebSynergy as Admin User.
- 2 Click on the Roles tab in the Enterprise Admin portlet.
- 3 Click on the Add Role button.
- 4 Specify a name for the role.  
In this example, DelegatedAdmin is the name of the role.
- 5 Click Save.  
The new role is added to the list of roles.

The screenshot shows the 'Enterprise Admin' interface with the 'Roles' tab selected. A green success message at the top states 'Your request processed successfully.' Below the navigation tabs, there is a search bar and buttons for 'Search Roles' and 'Add Role'. The main content area displays a table of roles with 15 results shown. The 'DelegatedAdmin' role is highlighted in blue.

Name	Type	Description	Actions
<a href="#">Administrator</a>	Regular	Administrators are super users who can do anything.	<a href="#">Actions</a>
<a href="#">Community Administrator</a>	Community	Community Administrators are super users of their community but cannot make other users into Community Administrators.	<a href="#">Permissions</a>
<a href="#">Community Member</a>	Community	All users who belong to a community have this role within that community.	<a href="#">Actions</a>
<a href="#">Community Owner</a>	Community	Community Owners are super users of their community and can assign community roles to users.	<a href="#">Permissions</a>
<a href="#">Content Designer</a>	Community	Creates new templates and structures for content	<a href="#">Actions</a>
<a href="#">Content Editor</a>	Community	Ability to create new articles	<a href="#">Actions</a>
<a href="#">Content Publisher</a>	Community	Ability to approve new content	<a href="#">Actions</a>
<a href="#">DelegatedAdmin</a>	Regular	Delegated administrator	<a href="#">Actions</a>
<a href="#">Guest</a>	Regular	Unauthenticated users always have this role.	<a href="#">Actions</a>

FIGURE 1–21 To Create a new Role

## ▼ To Assign a new Role to a Portlet

- 1 Login to WebSynergy as Admin User.
- 2 click any of the tabs in the Enterprise Admin portlet.  
The Enterprise Admin portlet expands.

- 3
- Click on the plugins tab.
- All plugins are listed. The first tab displays portlet plugins.

Enterprise Admin

Return to Full Page

UsersOrganizationsUser GroupsRolesPassword PoliciesSettingsMonitoringPlugins

Portlet PluginsTheme PluginsLayout Template PluginsHook PluginsWeb Plugins

Showing 1 - 20 of 107 results.

Items per Page20Page1 of 6FirstPreviousNextLast

Portlet	Active	Roles
<a href="#">Activities</a> Package: Liferay Core Plugins ()	Yes	Guest, Power User, User
<a href="#">Activities</a> Package: World of Liferay Portlet (wol-portlet) Group Users Activities	Yes	Administrator, Guest, Power User, User
<a href="#">Admin</a> Package: Liferay Core Plugins ()	Yes	Administrator
<a href="#">Alerts</a> Package: Liferay Core Plugins ()	Yes	Power User, User

FIGURE 1–22 To Create a new Role

- 4
- Click on a portlet plugin.
- In this example, click on 'Admin'. The edit page for plugin attributes appears.
- 5
- Add a new role for the plugin.
- In this example, add the 'DelegatedAdmin' role.

Enterprise Admin

Plugin

Module ID liferay/core-plugins/5.2.0/war  
Plugin ID 9

Active ☒

Enter one role name per line. A user must belong to one of these roles in order to add this plugin to a page.

Administrator  
DelegatedAdmin

SaveCancel

FIGURE 1–23 To Create a new Role

- 6
- Click Save.
- The new role is added to the portlet plugin.

Enterprise Admin [Return to Full Page](#)

✓ Your request processed successfully.

Users Organizations User Groups Roles Password Policies Settings Monitoring **Plugins**

Portlet Plugins Theme Plugins Layout Template Plugins Hook Plugins Web Plugins

Showing 1 - 20 of 107 results. Items per Page **20** Page **1** of 6 [First](#) [Previous](#) [Next](#) [Last](#)

Portlet	Active	Roles
<b>Activities</b> Package: Liferay Core Plugins ()	Yes	Guest, Power User, User
<b>Activities</b> Package: World of Liferay: Portlet (wol-portlet) Group Users Activities	Yes	Administrator, Guest, Power User, User
<b>Admin</b> Package: Liferay Core Plugins ()	Yes	Administrator, DelegatedAdmin
<b>Alerts</b> Package: Liferay Core Plugins ()	Yes	Power User, User

FIGURE 1–24 To Create a new Role

## ▼ To Assign a new Role to a User

- 1 Login to WebSynergy as Admin User.
- 2 Click on the Users tab.
- 3 Click on a user.

In this example, choose 'Chris'. The page for the user appears

- 4 Click on the Select button below Roles.

The window listing all available roles appears.

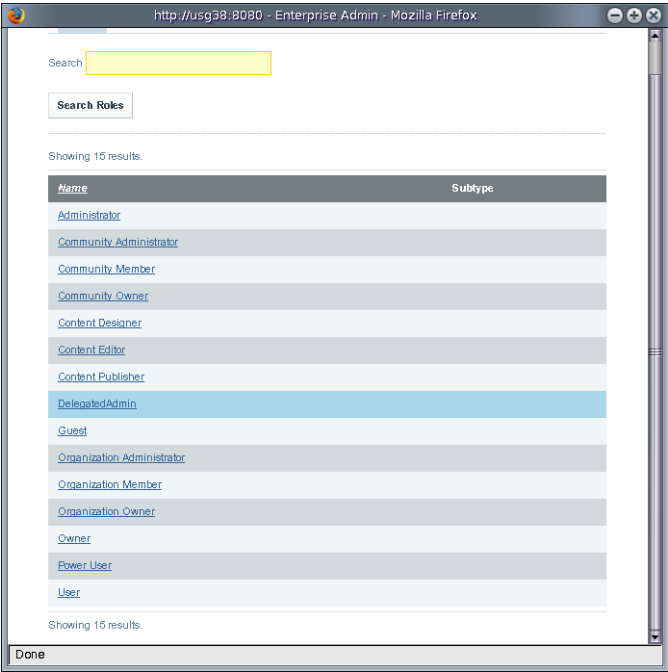


FIGURE 1–25 To Assign a new Role to a User

- 5 **Click on a selected Role.**  
In this example, click on 'DelegatedAdmin'. The Role is assigned to the User.
- 6 **Click Save.**

▼ **To Access a Portlet**

- 1 **Login to WebSynergy as a general user.**  
In this example, login as Chris Editor.
- 2 **Click Add Application form the welcome menu.**
- 3 **Search for the delegated portlet using the search box in the Add Application window.**  
In this example, search for 'Admin'.
- 4 **Add the portlet to your page by clicking on the Add button against the portlet.**  
In this example, add the Admin portlet to your page.

## A Use Case for Presence Feature

To be done.

### Chatting Using Project WebSynergy

The 'Chat' feature in Project WebSynergy enables you to chat with the 'Friends' who are currently online.

If you consider the example of *Sample Users* for Project WebSynergy, *Ed Developer*, *Mary Manager*, and *Chris Editor* are the Friends for *Paul Tester*. The Friends portlet displays all the friends for the user.

This means, Paul can chat with Ed, Mary or Chris if they are online. You can chat with friends by clicking on *Chat* at the right-bottom of your page. *Chat {0}* indicates that no friends are online. *Chat {1}* indicates that there is one friend online.

Consider, a simple use case to demonstrate the working on the Chat feature.

1. Open a browser window and login to Project WebSynergy as Paul Tester.
2. Open another browser window and login as Mary Manager.
3. Click on *Chat*. It displays all the friends who are online. In this example, it displays 'Paul Tester'. Click on 'Paul Tester' to write a message, and press Enter.
4. When you login again as Paul Tester, you can view the message from Mary Manager by clicking on Chat. You can reply to the message from Mary Manager.

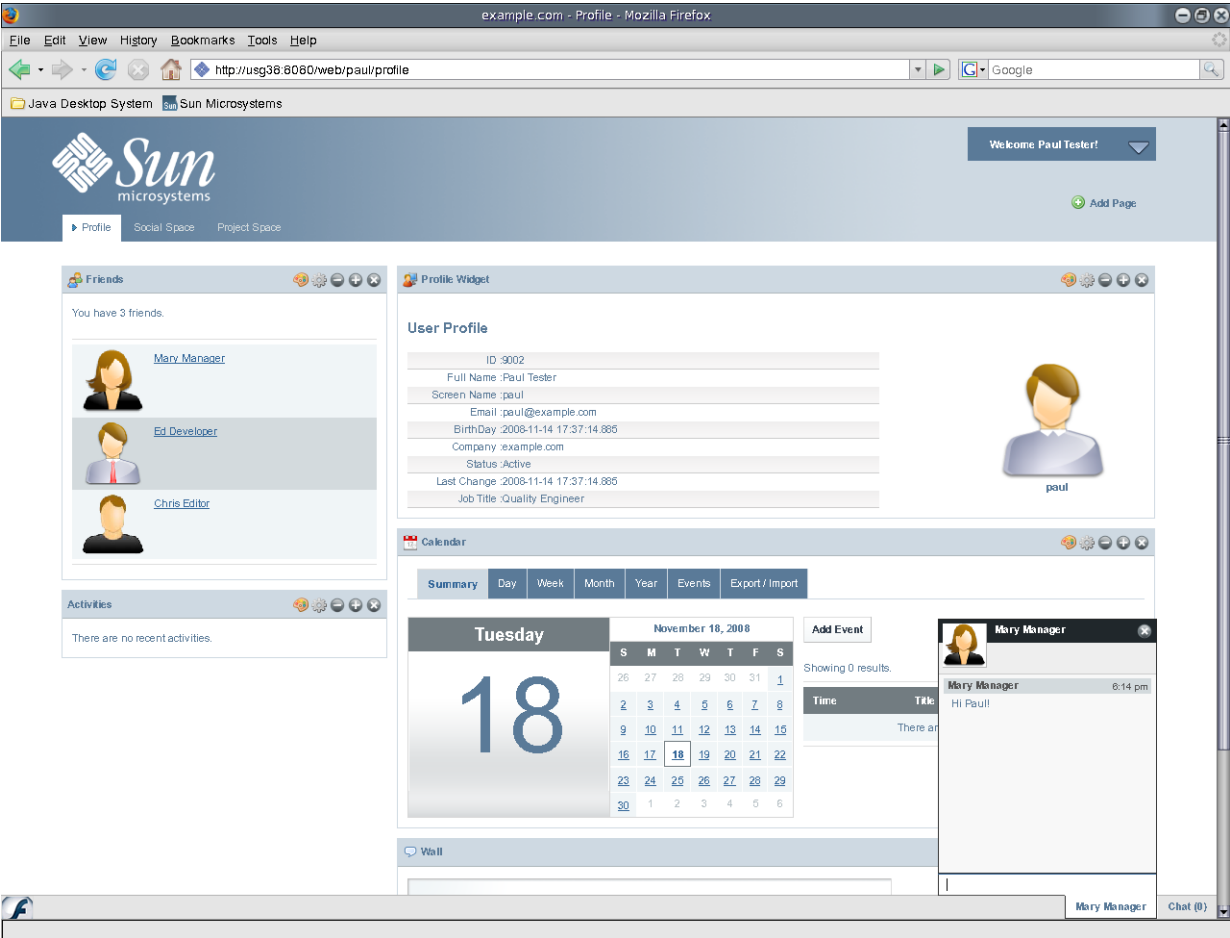


FIGURE 1-26 Chat feature

## Making Calls Using Project WebSynergy

To be done.

## A Use Case for Enterprise Social Networking

*Facebook, Linkedin, Plaxo, and Twitter* are the two most popular Enterprise Social Networking websites. The Facebook, Linkedin, Plaxo, and Twitter portlets in WebSynergy provide the interface to work with these Enterprise Social Networking websites respectively.



## ▼ To Access the Facebook Portlet

- 1 Login to WebSynergy as a general user.  
In this example, login as Chris Editor.
- 2 Click Add Application form the welcome menu.
- 3 Add the Facebook portlet to your page.

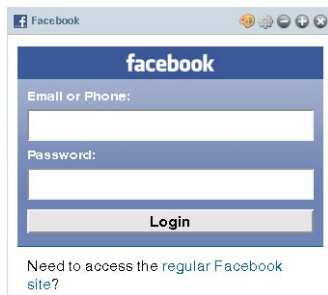


FIGURE 1–27 Facebook portlet

- 4 Login to Facebook by using the interface provided by the portlet.

## ▼ To Access the LinkedIn Portlet

- 1 Login to WebSynergy as a general user.  
In this example, login as Chris Editor.
- 2 Click Add Application form the welcome menu.
- 3 Add the LinkedIn portlet to your page.



FIGURE 1–28 LinkedIn portlet

- 4 Login to Facebook by using the interface provided by the portlet.

# Where To Go Next?

To be done.

## Customizing Project WebSynergy

---

To be done.

- [Branding and Site Identity](#)
- [Friendly URLs](#)
- [Virtual Hosting](#)
- [Site Layout and Navigation](#)
- [Using Bundled WebSynergy Portlets](#)
- [“Customizing the Look and Feel and Configuration of a Portlet” on page 45](#)

### Branding and Site Identity

To be done.

- [“To change the Banner Logo” on page 35](#)
- [“To change the Address Bar and Browser tab Icons” on page 36](#)

#### ▼ To change the Banner Logo

- 1 Login to Project WebSynergy as Test User.
- 2 Click Add Applications and expand the Admin folder.
- 3 Click Add against the Enterprise Admin portlet.

The *Enterprise Admin* portlet is added to your page

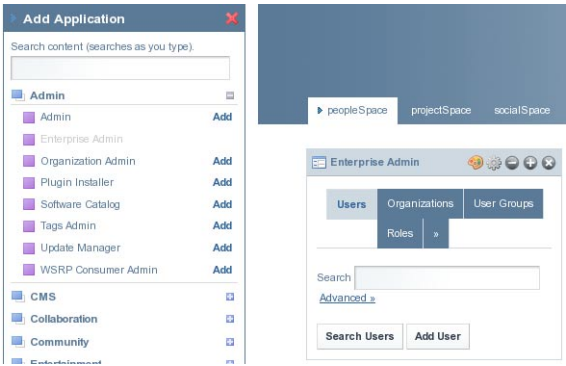


FIGURE 2-1 Enterprise Admin portlet

4 Maximize the portlet, and click on the Settings tab.

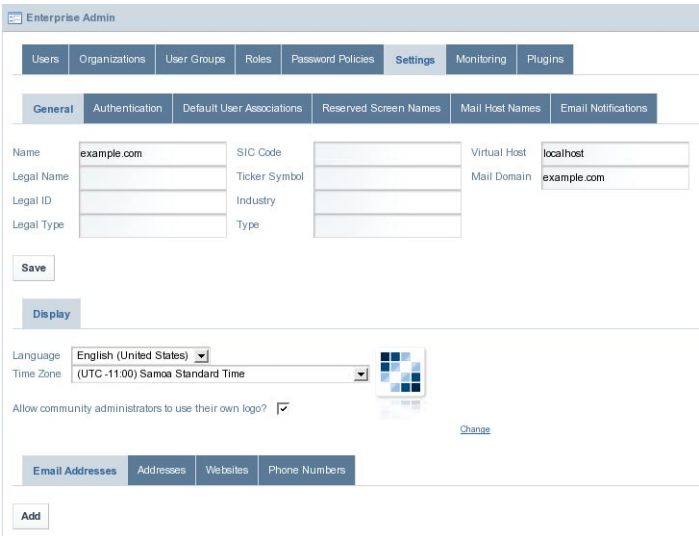


FIGURE 2-2 Settings page

5 Click on the Change link. You are prompted to browse and select a new banner logo.

▼ To change the Address Bar and Browser tab Icons

1 Navigate to the directory which contains the WebSynergy installation.

- 2 From the directory containing the WebSynergy installation, navigate to  
/glassfish/domains/domain1/applications/j2ee-modules/websynergy/html/themes/classic/i
- 3 Change the liferay.ico image.
- 4 Clear the browser cache and reload the page.

## Friendly URLs

To be done.

### ▼ To change the Friendly URL of a Page

- 1 Login to Project WebSynergy as Test User.
- 2 Click on Manage Pages from the welcome menu.

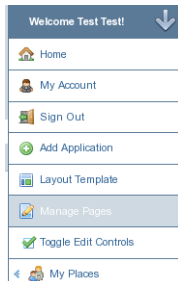


FIGURE 2-3 Welcome menu – Manage Pages

You can see all the pages on the left hand side under the Guest (Test Test).

Manage Pages

[Return to Full Page](#)

Pages

Look and Feel

Export / Import

Expand All | Collapse All

Test Test

peopleSpace

projectSpace

socialSpace

sunSpace

Edit Private Page: Test Test » peopleSpace

Page

Children

Look and Feel

Default Language: English (United States)

Localized Language:

Name

peopleSpace

HTML Title

Type

Portlet

Hidden

☐

Friendly URL

http://localhost:8080/user/test/people

For example, /news.

Icon

Browse...

Use Icon

☐

Target

Copy Page

Meta Tags:

Show

JavaScript:

Show

Save

Permissions

Delete

FIGURE 2-4 Manage Pages page

Friendly URL for the *PeopleSpace* page is `http://localhost:8080/user/test/people`. This means, you can directly access the PeopleSpace page by typing the URL `http://localhost:8080/user/test/people`, as seen in the below figure.

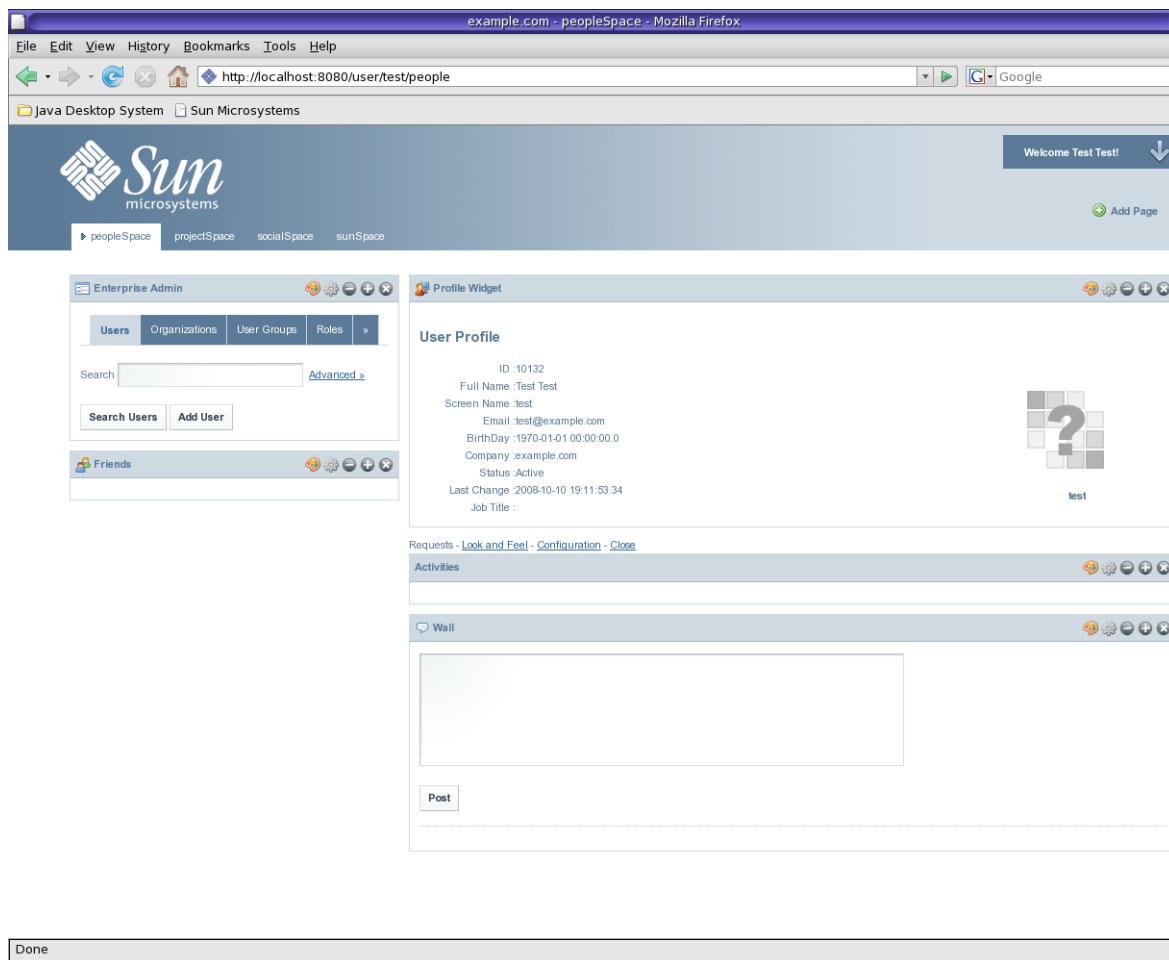


FIGURE 2-5 Friendly URL for the page

You can note the at value in the Friendly URL field looks as below:



FIGURE 2-6 Friendly URL field

- 3 **Change the value of the Friendly URL to the value you like.**  
In our example, we change it from *people* to *friendly\_url*.



FIGURE 2-7 Friendly URL field with new Friendly URL

- 4 **Click Save.**  
A message saying that the page is not found appears. For the changed URL to take effect, logout and login back to WebSynergy.
- 5 **Now you can view the Friendly URL.**  
The changed Friendly URL for the PeopleSpace page is  
`http://localhost:8080/user/test/friendly_url`.

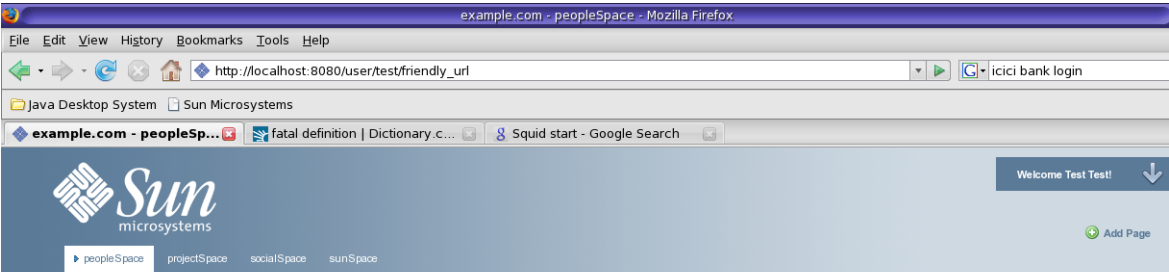


FIGURE 2-8 New Friendly URL

## Virtual Hosting

Virtual Hosting is a method where more than one domain or subdomain name can be hosted on the same WebSynergy portal binaries.

- [“Virtual Hosting \(ASP\)” on page 41](#)
- [“Virtual Hosting \(Communities\)” on page 41](#)

## Comparison

In the ASP model, each "Instance" or "Company" maintains data in the database that is completely segregated from other data in the database. This is usually handled via an entry in each database table known as a companyId and must be assigned a specific virtual host address. Hence, if there is to be complete isolation of different sets of data, this is the best mechanism for virtual hosting. However, due to the fact that the data is effectively namespaced, a completely



separate set of users/admins are needed to manage each unique Company. Other data (e.g., Journal CMS content) can be shared across the different Companies and, hence, must be completely reproduced.

For "Communities," these are common areas that users within a given Company can access if given the rights. Creating Communities is a matter of clicking a button and can be configured to have a virtual host address if so desired (but not necessary, unlike the ASP model). User management is much simpler in this case since users can be participating in a number of different communities. Also, Instance-scoped or Company-scoped data can be accessed from other communities as well. The main con in this environment is the lack of isolation in the data.

## Virtual Hosting (ASP)

To be done.

## Virtual Hosting (Communities)

To be done.

# Site Layout and Navigation

To be done.

- [“To change the Site Layout” on page 41](#)
- [“To create a new Layout” on page 42](#)
- [“Changing the Page Theme” on page 43](#)

## ▼ To change the Site Layout

- 1 Login to Project WebSynergy as Admin user.
- 2 Click on Layout Template from the Welcome menu.

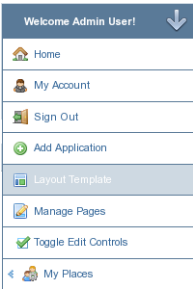


FIGURE 2-9 Welcome menu – Layout Template

3 The Layout page appears.

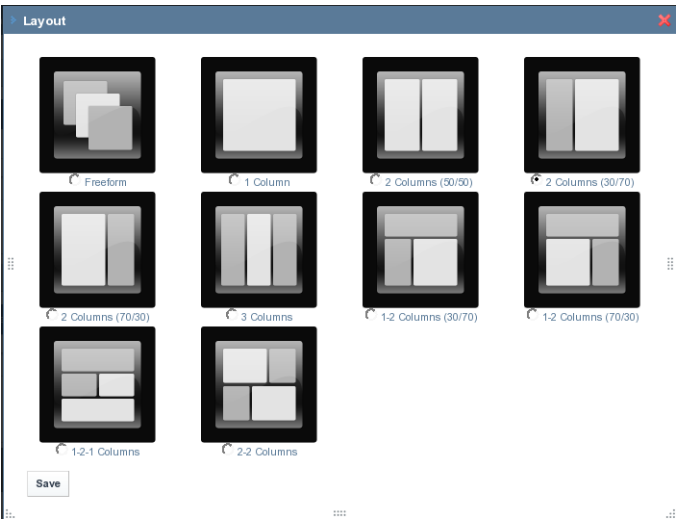


FIGURE 2-10 Layout Templates

4 Select the Layout you want to use and click Save.

▼ To create a new Layout

- To be done.

## Changing the Page Theme

You can view and change your page theme. The below procedure explains how you can change the page theme.

### ▼ To Change the Page Theme

**1 Login to Project WebSynergy.**

Any user can change themes, but only the admin user has access to all available themes, and has the privilege to install more themes.

**2 Choose Manage Pages from the welcome menu.**

**3 Click on the Look and Feel tab.**

The Current Theme for the page and all the available themes are displayed.

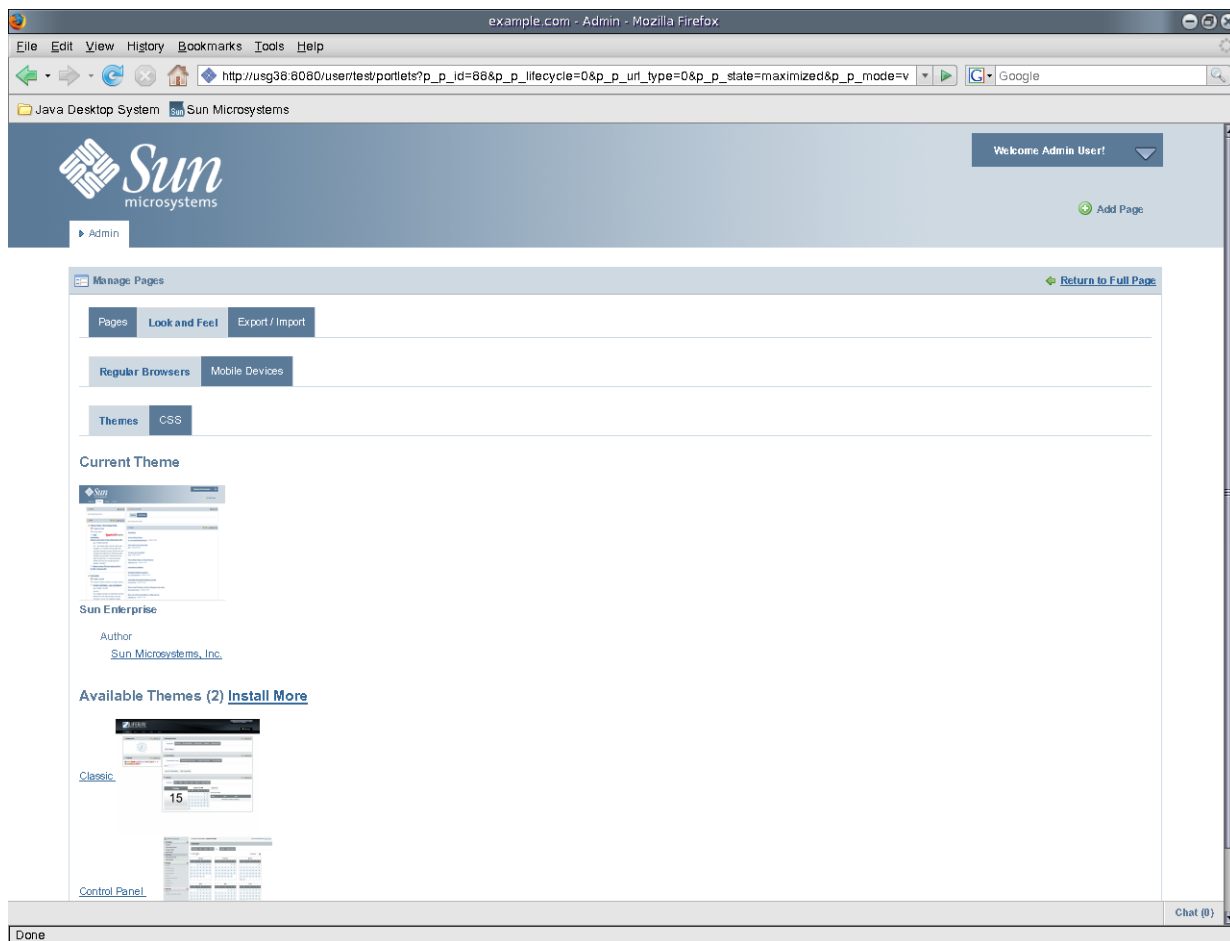


FIGURE 2-11 Page Theme

- 4 To change the theme, click on a theme from Available Themes.  
The theme is applied to your page.

## Using Bundled WebSynergy Portlets

To be done.

## ▼ To use Bundled WebSynergy Portlets

- 1 Login to Project WebSynergy as Admin user.
- 2 Click on Add Applications from the welcome menu.

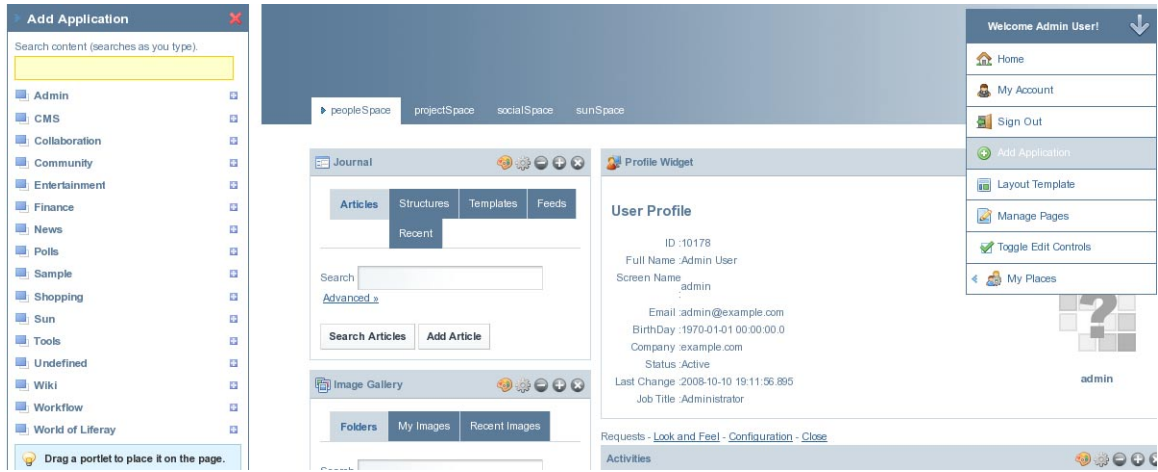


FIGURE 2-12 Bundled WebSynergy Portlets

- 3 Add the required portlet to your page.

## Customizing the Look and Feel and Configuration of a Portlet

You can change the display name of a portlet and also its look and feel.

### Changing the Name of a Portlet

You can change the display name of a portlet simply by clicking on the name of the portlet.

## ▼ To Change the Name of a Portlet which is on a Private Page

- 1 Login to Project WebSynergy as any user of your choice.  
In this example, login as Paul Tester.
- 2 Click on the name of a portlet.  
For example, click on the name of the Friends portlet.

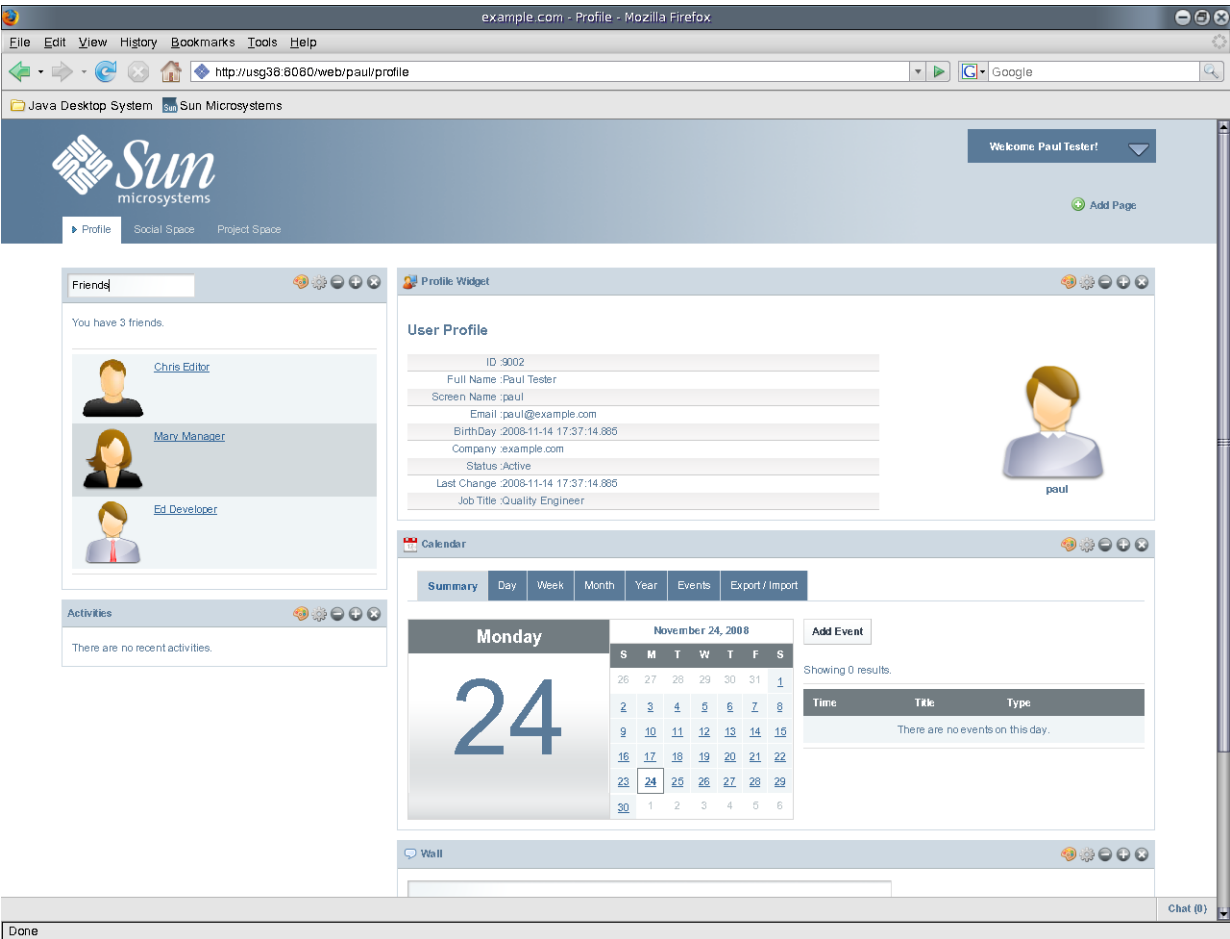


FIGURE 2-13 Changing the display name of a portlet

3 Edit the display name.

In this example change the name of the portlet to *Associates*.

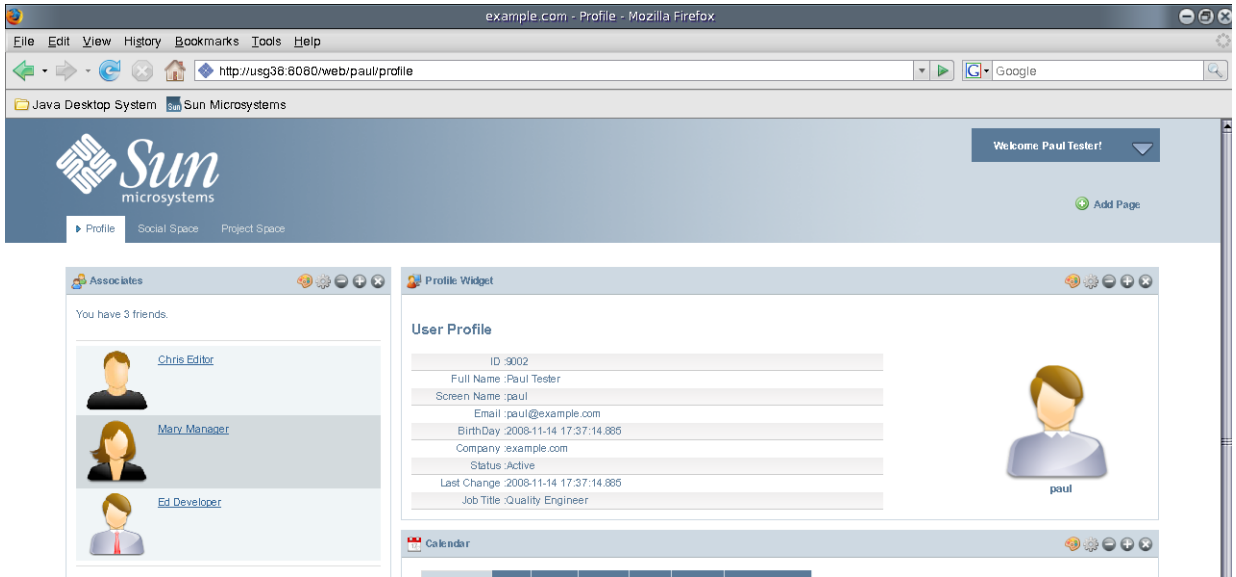


FIGURE 2-14 Changed display name

### ▼ To Change the Name of a Portlet which is on a Public Page

To change the name of a portlet which is on the public page of a user, you need to login as the user and navigate to the public page of the user from *My Places* on the welcome menu.

- 1 Login to Project WebSynergy as any user of your choice.
- 2 Navigate to a public page of the user by selecting *My Places* on the welcome menu.
- 3 Click on the name of a portlet, and edit and change the name.

## Customizing the Look and Feel and Configuration of a Portlet

The Look and Feel and Configuration buttons on a portlet can be used to customize the portlet.



FIGURE 2-15 Look and Feel and Configuration buttons on a portlet

## The Look and Feel Button

A window pops-up on clicking the Look and Feel button. The window provides options to customize the look and feel of the portlet.

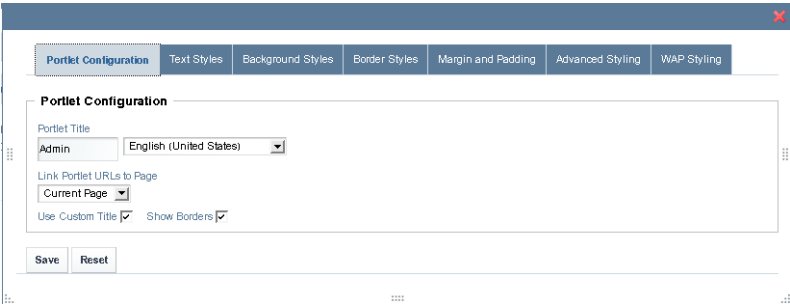


FIGURE 2-16 Customizing the Look and Feel

The window has tabs for Portlet Configuration, Text Styles, Background Styles, Border Styles, Margin and Padding, Advanced Styling, and WAP Styling.

## Portlet Configuration tab

If you enable the *Use Custom Title* option, you can change the value in the *Portlet Title* field. When you click Save, the new title for the portlet takes effect. The *Show Borders* option can be used to enable or disable the display of borders.

## Text Styles tab

Using this tab, you can change the default settings for text such as, font, size, color, alignment, bold, and italic.

## Background Styles tab

Using this tab, you can change the default background color for the portlet.



## Border Styles tab

Using this tab, you can change the border styles for the portlet. You can change the default settings for the Border Width, Border Style, and Border Color. You can set different width, style, and colors for different borders by disabling the *Same for All* option.



# Administering Roles and Permissions

---

Roles and permissions can be administered by using some portlets, such as the *Enterprise Admin Portlet* and *Communities Portlet*. Alternatively, we can use the *Control Panel* to administer roles and permissions.

- [Administration Roles](#)
- [User Groups](#)
- [Communities](#)
- [Organizations](#)
- [Users and User Roles](#)
- [Plugins](#)

## Administration Roles

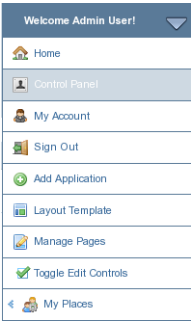
The tasks which an admin user can perform are called as administration roles. The admin user can use the Control Panel to perform different administration tasks.

## Using the Control Panel to Administer Roles and Permissions

You can use the Control Panel to administer roles and permissions.

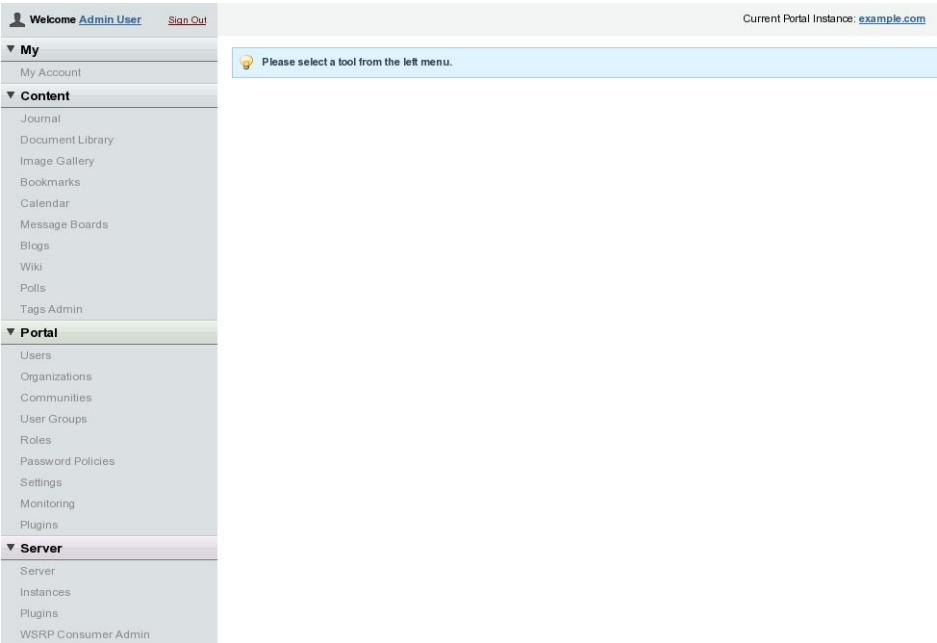
### ▼ To use the Control Panel

- 1 Login to Project WebSynergy as Admin user.
- 2 Choose Control Panel from the welcome menu.



**FIGURE 3–1** Welcome menu – Control Panel

The Control Panel page appears.



**FIGURE 3–2** Control Panel

- 3 To view and make changes to an item, choose an item from the left menu.**
- For example, click on *Users* under *Portal*. From this page, you can set roles and permissions for users. Similarly, you can set roles and permissions for *Organizations*, *Communities*, and *User Groups*.

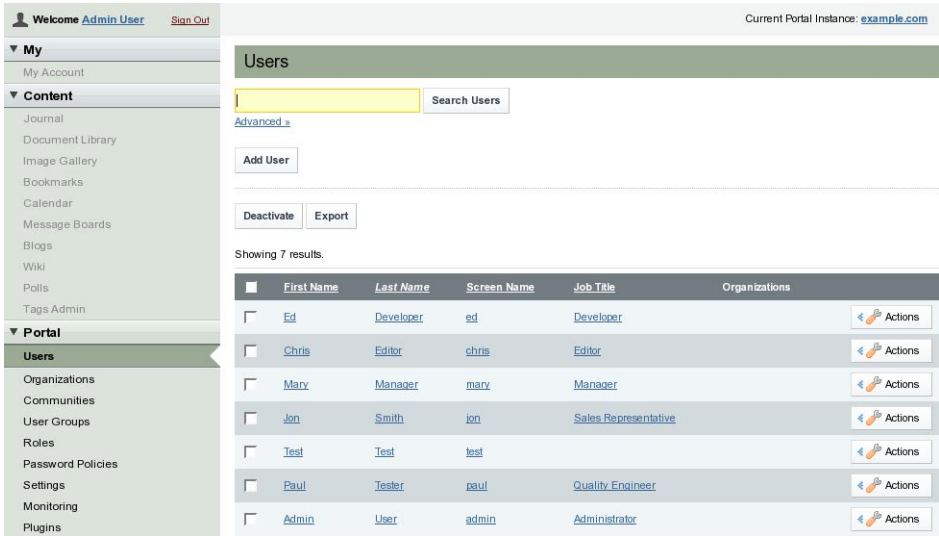


FIGURE 3-3 Using the Control Panel

# User Groups

User Groups are arbitrary groupings of users. These groups are created by portal administrators to group users together who don't have an obvious organizational or community-based attribute or aspect which brings them together. Groups can have permissions, much like roles. You would therefore use a User Group to grant permissions to any arbitrary list of users.

For example, a User Group called “People Who Have Access to My Stuff” could be created, and permission to a particular Document Library folder could be granted to that User Group. This list of users could be members of separate Organizations, Communities, or Roles, who happen to also have access to this Document Library folder which is on some personal, community, or organization page that is accessible to them in the portal.

- [Defining User Groups](#)
- [Assigning Users to User Groups](#)

## Defining User Groups

To be done.

▼ **To create a User Group**

- 1 Login to WebSynergy as Admin user.
- 2 Click Add Applications, and click Add against the Enterprise Admin portlet.

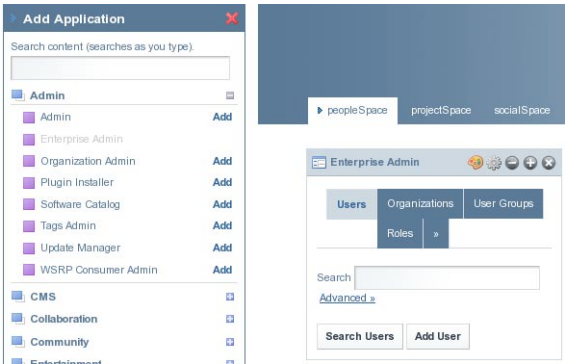


FIGURE 3–4 Adding Enterprise Admin portlet to the portlet page

- 3 Click on User Groups.

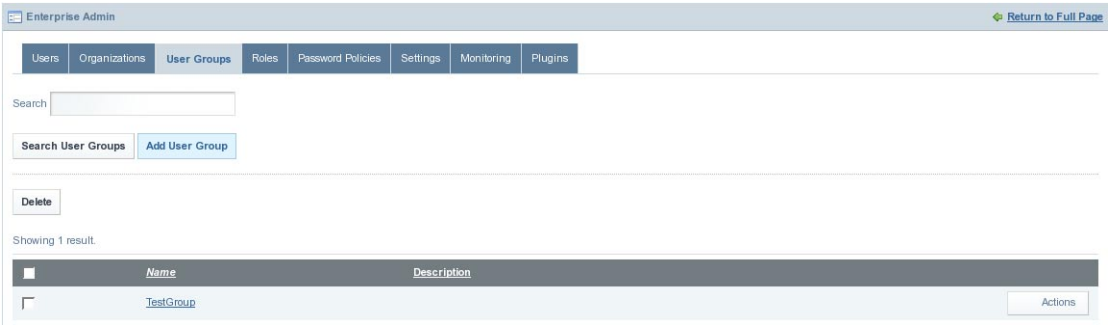


FIGURE 3–5 User Groups

- 4 Click on the Add User Group button.

Enterprise Admin

User Groups

Name: Admin

Description: A group of admin users

Save Cancel

FIGURE 3–6 Adding an User Group

- 5 Specify a name and a description for the group and click Save.

## Assigning Users to User Groups

To be done.

### ▼ To assign Users to User Groups

- 1 Select a user group and click Actions to select Assign Members from the menu.

Enterprise Admin

Users Organizations **User Groups** Roles Password Policies Settings Monitoring Plugins

Search

Search User Groups Add User Group

Delete

Showing 2 results.

	Name	Description	
<input checked="" type="checkbox"/>	Admin	A group of admin users	<div>EditPermissionsManage PagesAssign MembersView UsersDeleteActions</div>
<input type="checkbox"/>	TestGroup		Actions

FIGURE 3–7 Assigning Users to User Groups

You can see all the current members of the User Group

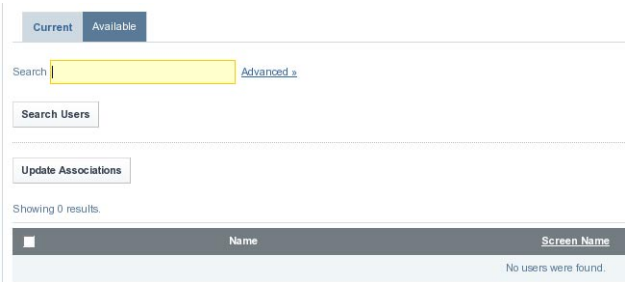


FIGURE 3–8 Current Tab

- 2 Click on Available tab to view the list of all available members.  
All available members are listed.

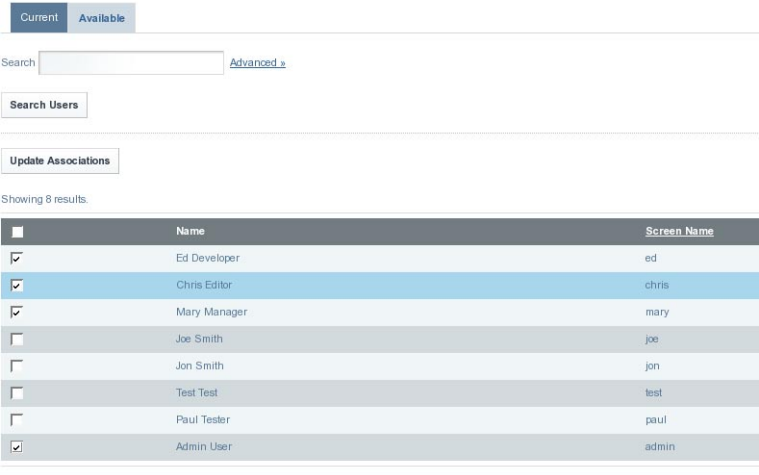


FIGURE 3–9 Available Tab

- 3 Select the users who you want to include in the User Group and click the Update Association button.
- 4 Click on the Current tab to view the users who are included in the User Group.



<input checked="" type="checkbox"/>	Name	Screen Name
<input checked="" type="checkbox"/>	Ed Developer	ed
<input checked="" type="checkbox"/>	Chris Editor	chris
<input checked="" type="checkbox"/>	Mary Manager	mary
<input checked="" type="checkbox"/>	Admin User	admin

FIGURE 3–10 Current Tab (after adding members to the User Group)

## Communities

Communities are collections of Users who have a common interest. WebSynergy's default pages are in the Guest community, because everyone-whether they are anonymous or members of the portal-has a common interest in the default, public pages of your site.

There are three types of Communities:

- Open
- Restricted
- Private

An Open Community (the default) allows portal users to join and leave the Community whenever they want to, provided they have access to a Communities portlet from which to do this. A Restricted Community requires that users be added to the Community by a community administrator. Users may use the Communities portlet to request membership. A Private community do not allow users to join and to leave the community.

- [Defining Communities](#)
- [Assigning Users to Communities](#)

## Defining Communities

To be done.

### ▼ To add a Community

- 1 Login to WebSynergy as Admin user.
- 2 Click Add Applications, and click Add against the Communities portlet.

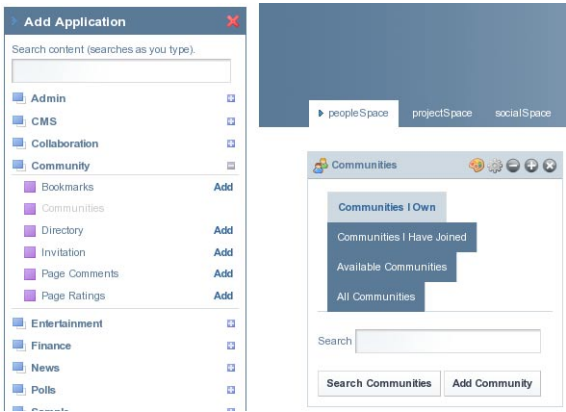


FIGURE 3–11 Adding Communities portlet to the portlet page

**3 Click on Add Community button.**

Specify the Name, Description, Type, and Active attributes for the community. Open is the default type.

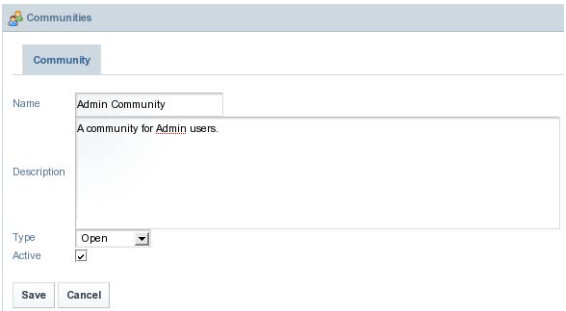


FIGURE 3–12 Adding a Community

**4 Click Save to save the community.**

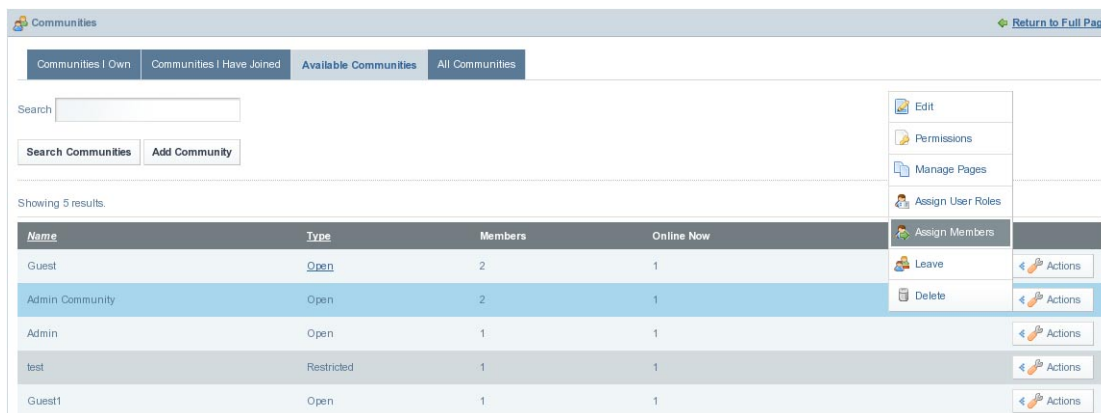
## Assigning Users to Communities

To be done.

▼ **To assign Users to a Community**

**1 Click on All Communities to list all available communities.**

- 2 Click the Actions button for the selected Community, and select Assign Members from the menu.

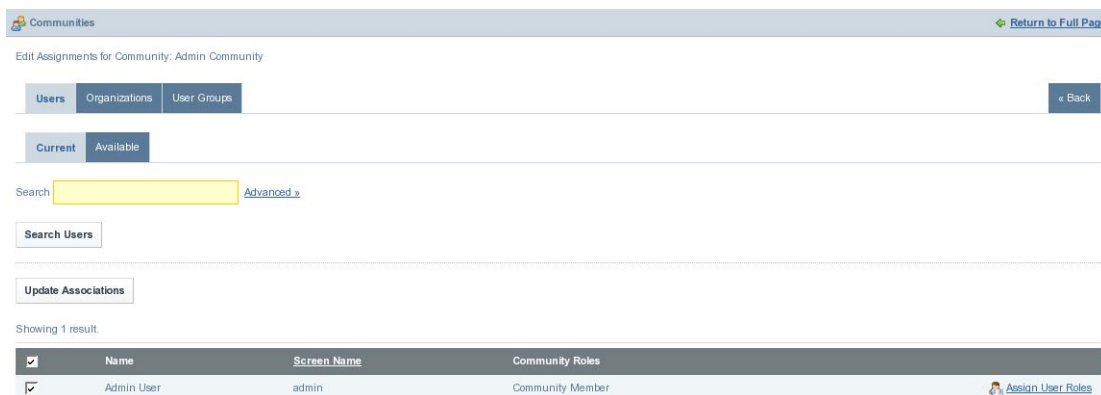


The screenshot shows the 'Communities' page with tabs for 'Communities I Own', 'Communities I Have Joined', 'Available Communities', and 'All Communities'. The 'Available Communities' tab is selected. A search bar and 'Search Communities' and 'Add Community' buttons are at the top. Below, a table lists 5 communities. The 'Admin Community' row is highlighted in blue. To the right of this row, an 'Actions' menu is open, showing options: Edit, Permissions, Manage Pages, Assign User Roles, Assign Members (highlighted), Leave, and Delete.

Name	Type	Members	Online Now
Guest	Open	2	1
Admin Community	Open	2	1
Admin	Open	1	1
test	Restricted	1	1
Guest1	Open	1	1

FIGURE 3-13 Assigning Users to a Community

All the current members of the Community are listed.



The screenshot shows the 'Edit Assignments for Community: Admin Community' page. It has tabs for 'Users', 'Organizations', and 'User Groups'. The 'Users' tab is selected. Below the tabs are 'Current' and 'Available' sub-tabs. A search bar with a yellow highlight and an 'Advanced' link are present. There are 'Search Users' and 'Update Associations' buttons. Below, a table shows 1 result for the 'Admin User' with the role 'Community Member'. A checkbox is checked in the first column. An 'Assign User Roles' link is at the bottom right.

<input checked="" type="checkbox"/>	Name	Screen Name	Community Roles
<input checked="" type="checkbox"/>	Admin User	admin	Community Member

FIGURE 3-14 Current Tab (before assigning members to the Community)

- 3 Click Available tab to list all available users.

Select the checkbox against each of the users who you want to assign as members. For example, select the checkbox against the user Joe Smith.

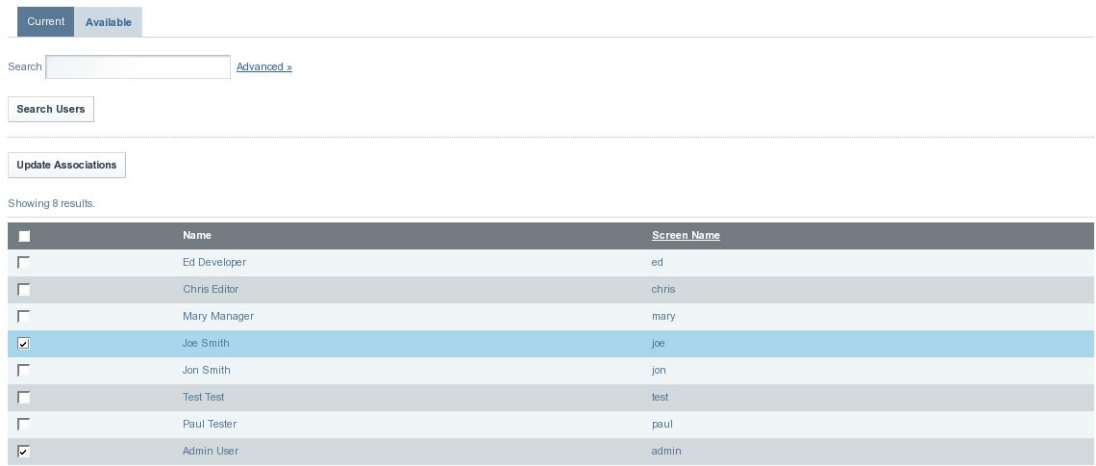


FIGURE 3–15 Available Tab

- 4 Click Update Associations button to assign selected Users as members.
- 5 Click on Current tab to view the users who are current members of the community.

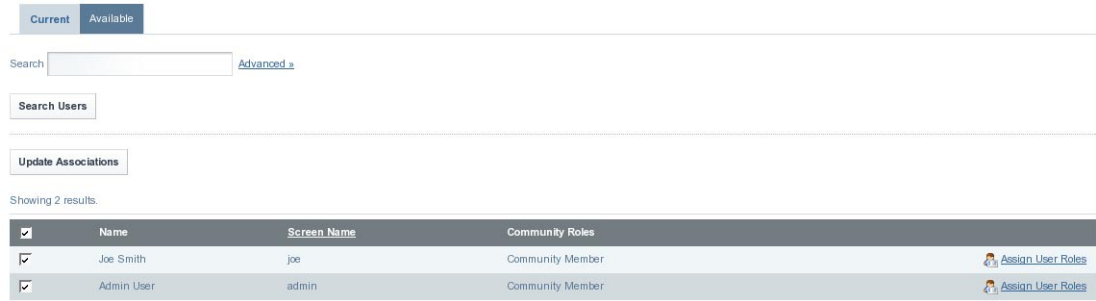


FIGURE 3–16 Current Tab (after assigning members to the Community)

# Organizations

Organizations are hierarchical collections of Users. They are one of the two types of portal resources that can have pages. There is also a special type of Organization called a location, which can define where users are specifically located.

There are two kinds of Organizations:

- Regular
- Location

The organization of type Regular can have suborganizations, but an organization of type Location is not allowed to have suborganizations.

Let us consider the example of creating an organization called *Admin Organization* and a Suborganization called *Admin Location*.

- [Defining Organizations](#)
- [Creating Users Under Organizations](#)

## Defining Organizations

This section outlines the procedure for [Create an Organization](#) and [Creating a Suborganization](#).

### ▼ To create an Organizations

- 1 Login to WebSynergy as Admin user.
- 2 Click Add Applications and expand the Admin folder.
- 3 Click Add against the Enterprise Admin portlet.

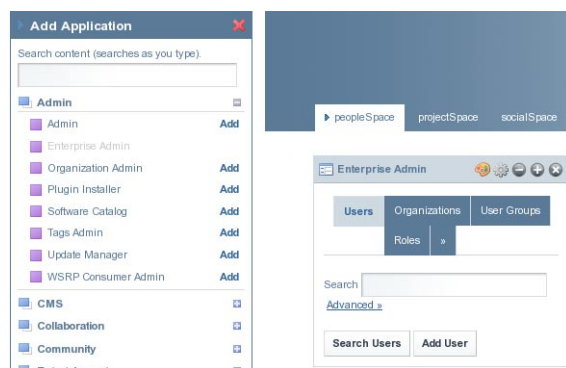


FIGURE 3-17 Adding Enterprise Admin portlet to the portlet page

- 4 Click on Organizations.  
All the existing Organizations are listed.

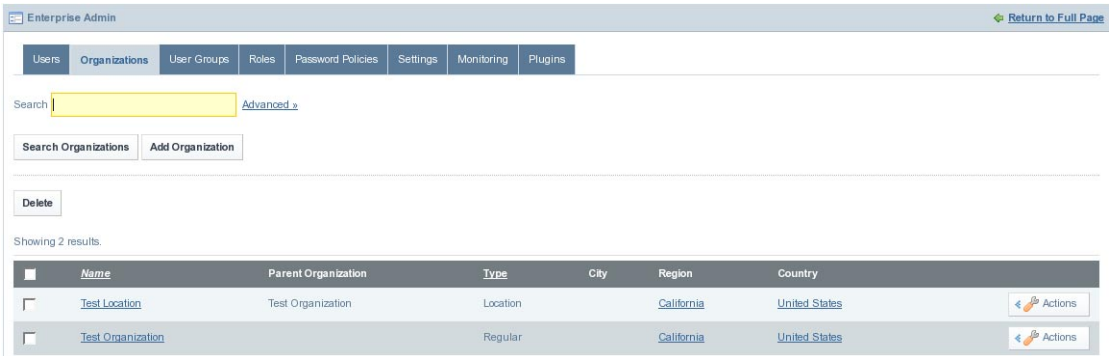


FIGURE 3–18 Organizations (currently existing)

- 5 Click Add Organization.
- 6 Specify the Name, Type, and Country for the Organization.  
The Organization needs to be of type *Regular*.



FIGURE 3–19 Creating a new Organization

- 7 Click Save.  
You can specify the other attributes, such as email ID, Address, and website.

Enterprise Admin [Return to Full Page](#)

Your request processed successfully.

**Organization** [Back](#)

Group ID: 10282 Type: Regular

Name: Admin Organization Country: United States

Parent Organization: Select Remove Region: Colorado

Save Cancel

Email Addresses Addresses Websites Phone Numbers

Add

Address	Type	Primary
The organization does not have any email addresses.		

Services

Add

Type
The organization does not have any services.

FIGURE 3–20 New Organization

- 8 Click on **Return to Full Page** and navigate back to the **Organizations** tab.  
You will find the just created organization in the list of Organizations.

Enterprise Admin [Return to Full Page](#)

Users **Organizations** User Groups Roles Password Policies Settings Monitoring Plugins

Search  [Advanced »](#)

Search Organizations Add Organization

Delete

Showing 3 results.

	Name	Parent Organization	Type	City	Region	Country	
<input type="checkbox"/>	<a href="#">Admin Organization</a>		Regular		Colorado	United States	<a href="#">Actions</a>
<input type="checkbox"/>	<a href="#">Test Location</a>	Test Organization	Location		California	United States	<a href="#">Actions</a>
<input type="checkbox"/>	<a href="#">Test Organization</a>		Regular		California	United States	<a href="#">Actions</a>

FIGURE 3–21 Organizations (including the new)

▼ **To create a Suborganization**

- 1 Click on Add Organization button.
- 2 Specify the name of the organization and other details.  
Make sure to select *Location* as the Type attribute.

The screenshot shows the 'Enterprise Admin' interface with a tab labeled 'Organization'. The form contains the following fields and controls:

- Name:** A text input field containing 'Admin Location'.
- Type:** A dropdown menu with 'Location' selected.
- Country:** A dropdown menu with 'United States' selected.
- Region:** A dropdown menu with 'Louisiana' selected.
- Parent Organization:** A section with 'Select' and 'Remove' buttons.
- Buttons:** 'Save' and 'Cancel' buttons at the bottom left.

FIGURE 3–22 Creating a Suborganization

- 3 Click Select to select the parent organization.

The screenshot shows a web browser window titled 'http://localhost:8080 - peopleSpace - Mozilla Firefox'. The page has a tab labeled 'Organizations'. It features a search bar with a 'Search' button and a 'Search Organizations' button. Below the search bar, it says 'Showing 2 results.' and displays a table of organizations.

Name	Parent Organization	Type	City	Region	Country
<a href="#">Admin Organization</a>		Regular			
<a href="#">Test Organization</a>		Regular			

At the bottom of the window, there is a 'Done' button.

FIGURE 3–23 Selecting a Parent Organization

The resultant window lists all the Organizations of type Regular.



**Note** – The system restricts creating a Location Organization without assigning a parent organization to it.

- 4 Select an Organization to make it the parent organization.**  
The selected Organization becomes the parent organization.

Enterprise Admin

Organization

Name: Admin Location Type: Location

Parent Organization: Admin Organization Select Remove Country: United States Region: Louisiana

Save Cancel

FIGURE 3–24 Suborganization with a Parent Organization

- 5 Click Save.**  
You can add other attributes such as phone number and address.

Enterprise Admin [Return to Full Page](#)

Your request processed successfully.

Organization [Back](#)

Group ID: 10296 Type: Location

Name: Admin Location Country: United States Region: Louisiana

Parent Organization: Admin Organization Select Remove

Save Cancel

Email Addresses Addresses Websites Phone Numbers

Add

Address	Type	Primary
The organization does not have any email addresses.		

Services

Add

Type

The organization does not have any services.

FIGURE 3–25 Organization particulars

- 6 Click on Return to Full Page and navigate back to the Organizations tab.**

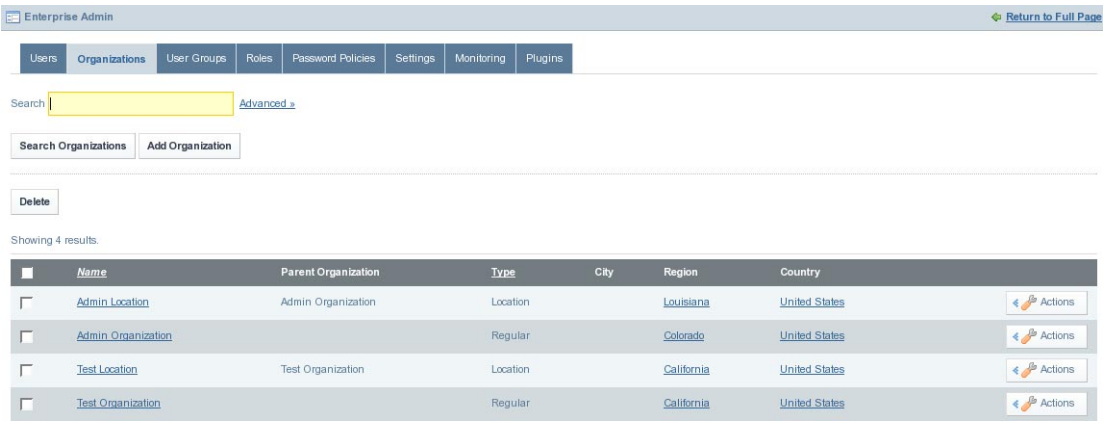


FIGURE 3–26 Organizations Tab (after adding the Suborganization)

# Creating Users Under Organizations

To be done.

## ▼ To create Users under Organization

- 1 Click on the Actions button against the selected Organization.  
We are selecting *Admin Organization*, as it is our example organization.

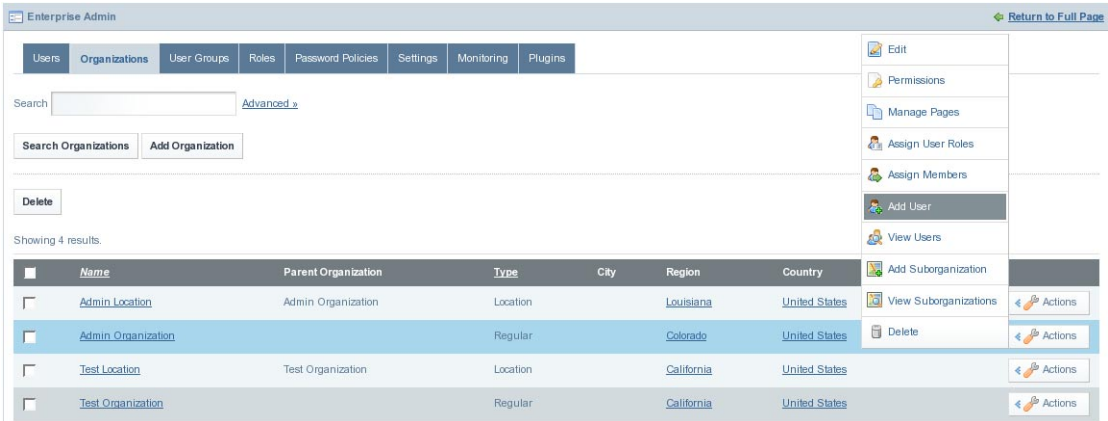


FIGURE 3–27 Adding Users to an Organization

## 2 Select Add User from the menu.

Specify the name and other details for the user.

Enterprise Admin

User

Screen Name: Joe Smith Birthday: January 1, 1970 Gender: Male

Email Address: Joe.Smith@example.com

Prefix: Organizations: Admin Organization [x] Select

First Name: Joe Job Title: Admin

Middle Name:

Last Name: Smith

Suffix:

Save Cancel

FIGURE 3–28 Creating a User (belonging to Organizations: Admin Organization)

By default, the user is assigned to the same Organization.

## 3 Click Select to add the User to other Organizations.

http://localhost:8080 - peopleSpace - Mozilla Firefox

Organizations

Search: Advanced

Search Organizations

Showing 4 results.

Name	Parent Organization	Type	City	Region	Country
<a href="#">Admin Location</a>	Admin Organization	Location			
<a href="#">Admin Organization</a>		Regular			
<a href="#">Test Location</a>	Test Organization	Location			
<a href="#">Test Organization</a>		Regular			

FIGURE 3–29 Window to select Organizations

## 4 Click on an Organization, to add the User to the Organization.

In our example, we are selecting *Admin Location*.

The user is added to the selected Organization.

Enterprise Admin

User

Screen NameJoe

BirthdaysJanuary11970

Email AddressJoe.Smith@example.com

GenderMale

Prefix

First NameJoe

Middle Name

Last NameSmith

Suffix

OrganizationsAdmin Organization [x], Admin Location [x]

Job TitleAdmin

Select

Save

Cancel

FIGURE 3–30 Creating a User (belonging to Organizations: Admin Organization & Admin Location)

5 Click Save.

You can specify a password, and can set Regular, Community, and Organization roles for the user.

Enterprise Admin

Return to Full Page

User

Back

User ID10291

BirthdaysJanuary11970

Screen Namejoe

GenderMale

Email Addressjoe.smith@example.com

OrganizationsAdmin Location [x], Admin Organization [x]

Job Title

Select

Prefix

First NameJoe

Middle Name

Last NameSmith

Suffix

Change

Save

Cancel

Display

Password

Regular Roles

Community Roles

Organization Roles

LanguageEnglish (United States)

Time Zone(UTC-11:00) Samoa Standard Time

GreetingWelcome Joe Smith!

Email Addresses

Addresses

Websites

Add

Address	Type	Primary
The user does not have any additional email addresses.		

Phone Numbers

OpenID

SMS Messenger ID

Instant Messenger IDs

Social Network IDs

Alerts and Announcements

Add

FIGURE 3–31 The User (Joe Smith) is created

# Users and User Roles

There are three kinds of User Roles:

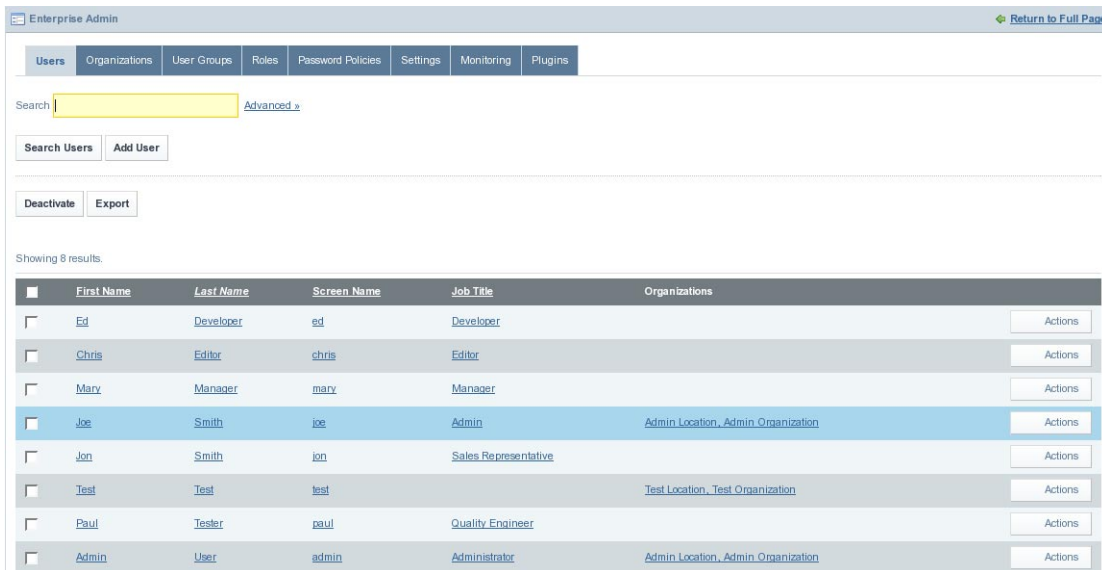
- Regular
- Community
- Organization
- [What Different User Roles Mean?](#)
- [Defining User Roles](#)

## What Different User Roles Mean?

To be done.

## Defining User Roles

All users are listed on clicking the *Users* tab in the *Enterprise Admin portlet*. You can assign Roles to a user.



Enterprise Admin [Return to Full Page](#)

Users Organizations User Groups Roles Password Policies Settings Monitoring Plugins

Search  [Advanced »](#)

[Search Users](#) [Add User](#)

[Deactivate](#) [Export](#)

Showing 8 results.

	First Name	Last Name	Screen Name	Job Title	Organizations	
<input type="checkbox"/>	Ed	Developer	ed	Developer		<a href="#">Actions</a>
<input type="checkbox"/>	Chris	Editor	chris	Editor		<a href="#">Actions</a>
<input type="checkbox"/>	Mary	Manager	mary	Manager		<a href="#">Actions</a>
<input type="checkbox"/>	Joe	Smith	joe	Admin	<a href="#">Admin Location</a> , <a href="#">Admin Organization</a>	<a href="#">Actions</a>
<input type="checkbox"/>	Jon	Smith	jon	<a href="#">Sales Representative</a>		<a href="#">Actions</a>
<input type="checkbox"/>	Test	Test	test		<a href="#">Test Location</a> , <a href="#">Test Organization</a>	<a href="#">Actions</a>
<input type="checkbox"/>	Paul	Tester	paul	Quality Engineer		<a href="#">Actions</a>
<input type="checkbox"/>	Admin	User	admin	Administrator	<a href="#">Admin Location</a> , <a href="#">Admin Organization</a>	<a href="#">Actions</a>

FIGURE 3–32 Users tab of the Enterprise Admin portlet

▼ **To define User Roles**

**1 Click on a selected User from the list.**

You can define *Regular Roles*, *Community Roles*, and *Organization Roles* tabs allow assigning Regular, Community, and Organization roles for the user.

**2 Defining Roles for a User:**

a. To define Regular Roles, right-click on the Regular Roles tab.

Enterprise Admin [Return to Full Page](#)

✓ Your request processed successfully.

User [Back](#)

User ID: 10240 Birthday: January 1, 1970 Gender: Male

Screen Name: joe

Email Address: joe.smith@example.com

Organizations: Admin Location [x], Admin Organization [x] [Select](#)

Prefix: [v] Job Title: Admin

First Name: Joe

Middle Name: [v]

Last Name: Smith

Suffix: [v]

[Save](#) [Cancel](#)

[Change](#)

Display Password **Regular Roles** Community Roles Organization Roles

[Assign Regular Roles](#)

Showing 0 results.

Name
Power User <a href="#">Remove</a>
User <a href="#">Remove</a>

**FIGURE 3–33** Regular Roles

It lists all the *Regular Roles* assigned to the User. *Power User* and *User* are the default Regular Roles. You can remove roles by clicking *Remove* against the user. *Administrator*, *Guest*, *Power User* and *User* are different kinds of Regular Roles.

**b. Click the Assign Regular Roles button.**

By default, it lists all the current Regular Roles of the user.

Current Available

Search

Search Roles

Update Associations

Showing 2 results:

<input checked="" type="checkbox"/>	Name	Type	Description
<input checked="" type="checkbox"/>	Power User	Regular	Power Users have their own public and private pages.
<input checked="" type="checkbox"/>	User	Regular	Authenticated users should be assigned this role.

FIGURE 3–34 Regular Roles (Current)

- c. Click the Available button to list all the available roles.

Current Available

Search

Search Roles

Update Associations

Showing 4 results:

<input type="checkbox"/>	Name	Type	Description
<input checked="" type="checkbox"/>	Administrator	Regular	Administrators are super users who can do anything.
<input type="checkbox"/>	Guest	Regular	Unauthenticated users always have this role.
<input checked="" type="checkbox"/>	Power User	Regular	Power Users have their own public and private pages.
<input checked="" type="checkbox"/>	User	Regular	Authenticated users should be assigned this role.

FIGURE 3–35 Regular Roles (Available)

- d. Select a Role that you want to associate with the user, and click the Update Associations button.
- e. Click the Current tab to view the current roles assigned with the user.

CurrentAvailable

Search

Search Roles

Update Associations

Showing 3 results.

<input checked="" type="checkbox"/>	Name	Type	Description
<input checked="" type="checkbox"/>	Administrator	Regular	<a href="#">Administrators are super users who can do anything.</a>
<input checked="" type="checkbox"/>	Power User	Regular	<a href="#">Power Users have their own public and private pages.</a>
<input checked="" type="checkbox"/>	User	Regular	<a href="#">Authenticated users should be assigned this role.</a>

FIGURE 3–36 Regular Roles (Assigned)

- 3

Return to the user page, and click on the Community Roles tab to view the community roles assigned to the user.

DisplayPasswordRegular RolesCommunity RolesOrganization Roles

Showing 0 results.

Name	Community
Community Member	Admin Community

FIGURE 3–37 Community Roles

- 4

Click on the Organization Roles tab.  
The organizations with which the user is associated and the roles associated with them are listed.

DisplayPasswordRegular RolesCommunity RolesOrganization Roles

Showing 0 results.

Name	Organization	
Organization Member	Admin Location	 <a href="#">Remove</a>
Organization Member	Admin Organization	 <a href="#">Remove</a>

FIGURE 3–38 Organization Roles



# Plugins

To be done.

- [What Are Plugins?](#)
- [Enabling Plugins](#)
- [Working With Plugin Permissions](#)

## What Are Plugins?

To be done.

## Enabling Plugins

To be done.

### ▼ To access Plugins

- 1 Expand the Enterprise Admin portlet to view all the tabs associated with the portlet.
- 2 Click on the Plugins tab.

Enterprise Admin

Return to Full Page

UsersOrganizationsUser GroupsRolesPassword PoliciesSettingsMonitoringPlugins

Portlet PluginsTheme PluginsLayout Template PluginsWeb Plugins

Showing 1 - 20 of 90 results.

Page 1 of 5FirstPreviousNextLast

Portlet	Active	Roles
<a href="#">Activities</a> Package: Liferay Core Plugins ()	Yes	Guest, Power User, User
<a href="#">Admin</a> Package: Liferay Core Plugins ()	Yes	Administrator
<a href="#">Alerts</a> Package: Liferay Core Plugins ()	Yes	Power User, User
<a href="#">Amazon Rankings</a> Package: Liferay Core Plugins ()	Yes	Power User, User
<a href="#">Announcements</a> Package: Liferay Core Plugins ()	Yes	Power User, User
<a href="#">Asset Publisher</a> Package: Liferay Core Plugins () Tagged Content	Yes	Guest, Power User, User
<a href="#">Blogs</a> Package: Liferay Core Plugins ()	Yes	Guest, Power User, User
<a href="#">Blogs Aggregator</a> Package: Liferay Core Plugins ()	Yes	Guest, Power User, User
<a href="#">Bookmarks</a> Package: Liferay Core Plugins ()	Yes	Power User, User
<a href="#">Breadcrumb</a> Package: Liferay Core Plugins ()	Yes	Guest, Power User, User

FIGURE 3–39 Plugins tab of the Enterprise Admin portlet

You can see four tabs listing portlets of four different categories namely; *Portlet Plugins*, *Theme Plugins*, *Layout Template Plugins*, *Web Plugins*.

## Working With Plugin Permissions

You can activate or deactivate a Portlet Plugin, and you can change the User Roles associated with a plugin. For example, the Admin portlet has the Administrator role associated with it. This means, a user registered as an administrator can access the portlet.

### ▼ To Change Plugin Permissions

- 1 Click on the portlet name.
- For example, click on the *Activities* portlet.

Enterprise Admin

Plugin

Module ID liferay/core-plugins/5.1.1/war  
 Plugin ID 116

Active ☒

Enter one role name **per line**. A user must belong to one of these roles in order to add this plugin to a page.

Guest  
 Power User  
 User

Save Cancel

**FIGURE 3–40** Plugin permissions

By default, all plugins are active. If you want to make the portlet inactive, deselect the *Active* checkbox. You can change the user access permissions for the portlet by adding or removing roles.

## 2 Click Save.



# Administering Content Management System

---

To be done.

- [CMS in WebSynergy](#)
- [Workflow Portlet](#)

## CMS in WebSynergy

Liferay Portal provides out-of-the-box CMS functionality in two major areas: document management (repositories for documents and images) and publishing.

Document management is provided through WebSynergy's Document Library and Image Gallery portlets. These portlets provide intuitive management of Microsoft Office documents, PDFs, text files, and images.

Publishing in the Project WebSynergy portal is accomplished through the Journal portlet. It features a clean separation between content (data entry) and presentation (layout design). This allows the content to conform to a consistent "look and feel." Additionally, the Journal portlet provides a content versioning and approval paradigm (workflow). This system allows for users involved in publishing to fall naturally into three different roles:

1. Writers create, edit, and enter content comprised of text and images.
2. Designers create layouts that display content.
3. Editors edit and approve final output and release it for publication to the portal.

As an example, consider Project WebSynergy the website. All of the static content is managed and published by the Journal portlet. We can authorize other members of the Liferay community to write documentation, but we retain final editorial authority and security. This also allows for a mixture of portlets and Journal articles to coexist, enabling the designer to be more creative with what is displayed. Designers can integrate static content using the Journal

Content portlet with a number of other function-rich portlets (e.g. Navigation and Breadcrumb). All of this shows how useful and flexible publishing can be with the Journal portlet.

Document Management Portlets:

- [“Document Library Portlet” on page 78](#)
- [“Document Library Display Portlet” on page 82](#)
- [“Image Gallery Portlet” on page 83](#)

Journal Portlets:

- [“Journal Portlets” on page 89](#)
- [“Journal Articles Portlet” on page 108](#)
- [“Journal Content Portlet” on page 108](#)
- [“Journal Content Search Portlet” on page 108](#)

Other portlets:

- [“Asset Publisher Portlet” on page 108](#)
- [“Breadcrumb Portlet” on page 121](#)
- [“Categories Navigation Portlet” on page 121](#)
- [“Navigation Portlet” on page 122](#)
- [“Nested Portlets Portlet” on page 122](#)
- [“Recent Documents Portlet” on page 122](#)
- [“Site Map Portlet” on page 122](#)
- [“Tags Admin Portlet” on page 122](#)
- [“XSL Content Portlet” on page 124](#)

## Document Library Portlet

The Document Library provides a centralized repository for various document types (e.g., .PDF, .DOC, .XLS, etc.) to be stored and assigns a unique URL to each of them. A company's intranet running Project WebSynergy portal can then be able to post internal documentation (e.g., reimbursement forms, charitable donations policies, etc.) for access by its employees. Alternatively, since each document has its own URL, the *Asset Publisher* portlet on your company's public website may display a list of PDF files of quarterly newsletters and their download links.

The Document Library supports multiple repositories that can be set with different access roles. Also, the documents in the repository are version-controlled, allowing a user to retrieve any particular revision that has been stored on the system.

- [“To add a Document” on page 79](#)
- [“To create Reference to a Document” on page 82](#)

## ▼ To add a Document

- 1 Login to WebSynergy.
- 2 Click Add Applications and expand the CMS folder.
- 3 Click Add against the Document Library Portlet.  
The Document Library Portlet is added to your page.

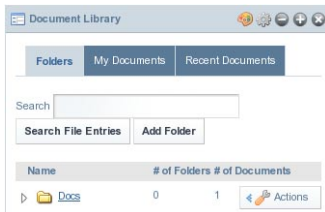


FIGURE 4-1 Document Library Portlet

The user interface of the portlet contains *Folders*, *My Documents*, and *Recent Documents* tabs. You can search documents using the *Search File Entries* button in the *Folders* tab. The *Add Folder* button in the *Folders* tab allows you to add folders. *My Documents* and *Recent Document* tabs list all the documents and the most recently accessed documents respectively.

- 4 Any document need to be in a folder. To add a new folder, click the Add Folder button.
- 5 Give a name and description to the folder. The permissions for the folder determine what users can do. Click Save. The Document Library screen will appear.

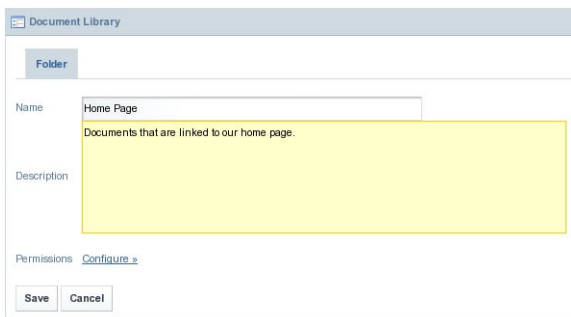


FIGURE 4-2 Creating a document folder

- 6 A folder is created. To add a document to that folder, click on the folder name.



FIGURE 4–3 Document folders

- 7 You can either add more folders to further divide your documents into more specific categories or you can add a document to the current folder. In this use case, we will add a document. Click **Add Document**.

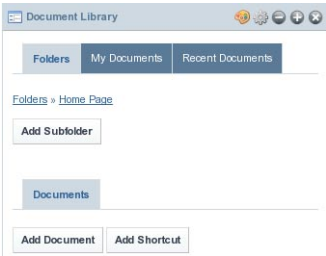


FIGURE 4–4 Document folder to add a document

The system prepares to add the document.

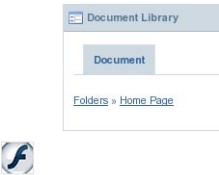


FIGURE 4–5 Preparing to upload the document

- 8 Click on the **upload button**:





FIGURE 4-6 Upload button

Now you can browse the document. You have classical upload and select multiple files options.

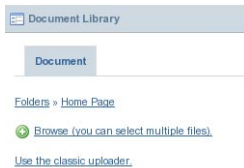


FIGURE 4-7 Upload options

Select any option that you like. There is a cap of 3000k on uploaded documents. After uploading the document, enter a title and description for the document.

Document Library

Document

Folders > Home Page

Upload documents no larger than 3000k.

File: /home/mp219492/Desktop Browse...

Title: FY09 Dashboard

Description: Dashboard for FY09 goals

Tags: Add Tags Or Select Tags

Permissions: Configure

Save Cancel

FIGURE 4-8 Uploading documents

## 9 Click Save when finished.

The article is added to the Document Library.

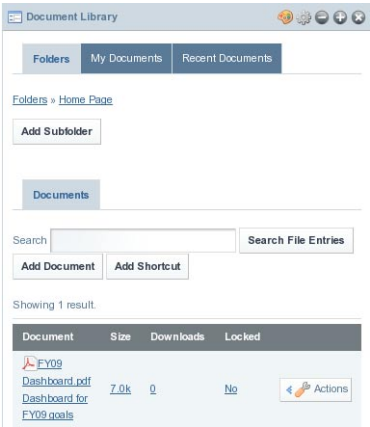


FIGURE 4–9    Uploaded document in the Document Library

▼    **To create Reference to a Document**

- 1    **Locate a document in the Document Library.**  
Using the example from the above section, locate the document `FY09_dashboard.pdf`.
- 2    **Right click on the document name, then select Properties to view its Address (URL).**  
You can then either highlight the entire URL or click anywhere over the URL area and press `Ctrl+A` to select the entire link. Keep in mind that the URL is long. If you use the highlight method, you must highlight the entire URL. You can then copy this link and reference it anywhere within the portal. You can even reference this document outside of the portal as long as your portal is running and the document is still in the repository. Refer to figure below.

Link Properties	
Address:	<code>http://localhost:8080/c/document_library/get_file?p_l_id=10215&amp;folderId=10330&amp;name=DLFE-5.pdf</code>
Will open in:	Same window

FIGURE 4–10    Link Properties

## Document Library Display Portlet

The Document Library Display Portlet holds the display functionality for Document Library. You can navigate to the folders and document in the Document Library, even by accessing the Document Library Display Portlet.

You can add Document Library Display Portlet to your page from among CMS portlets in the Add Applications window.

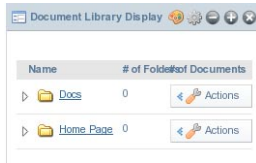


FIGURE 4–11 Document Library Display Portlet

## Image Gallery Portlet

Like the Document Library, the Image Gallery provides a centralized repository for images used throughout the Project WebSynergyPortal and assigns a unique URL to each image.

- “To add an Image” on page 83
- “To create Reference to an Image” on page 87
- “To View Image Slide Show” on page 87

### ▼ To add an Image

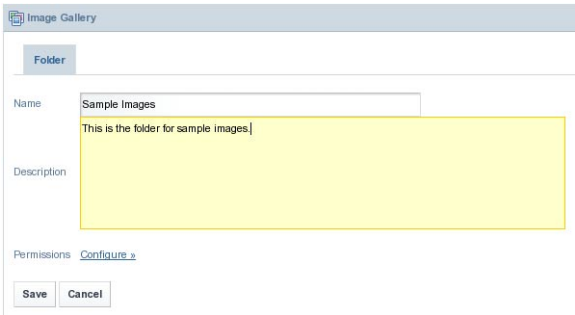
- 1 Login to WebSynergy.
- 2 Click Add Applications and expand the CMS folder.
- 3 Click Add against the Image Gallery Portlet.

The portlet is added to your page.



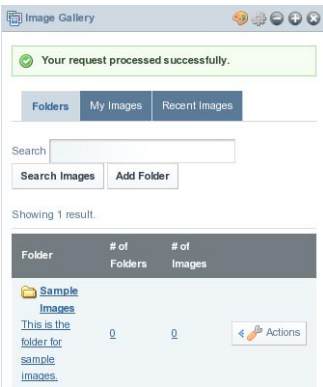
FIGURE 4–12 Image Gallery Portlet

- 4 Click on the Add Folder button.  
Specify a name and description and click *Save*.



**FIGURE 4–13** Adding a folder to the Image Gallery Portlet

The folder is added to the portlet.



**FIGURE 4–14** Image Gallery Portlet with a newly created folder

- 5 **Click on the name of the folder.**  
You can add a subfolder or an Image within the folder. In our example we are adding an image for the folder we have already created.



FIGURE 4–15 Image folder

**6 Click on the Add Image button.**



FIGURE 4–16 Preparing to upload an image

**7 Click on the upload button:**



FIGURE 4–17 Upload button

Now you can browse the document. You have classical upload and select multiple files options.

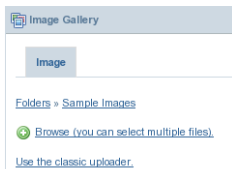


FIGURE 4–18 Upload options

**8 Select either of the two options to upload images.**

There is a cap of 3000k on uploaded documents. After uploading the document, enter a title and description for the document.

Image Gallery

Image

Folders > Sample Images

Upload images no larger than 10000k.

File

/home/mp219492/Desktop

Browse...

Name

Taj Mahal

Description

A great monument from India

Tags

Add Tags

Or

Select Tags

Permissions

Configure »

Save

Cancel

FIGURE 4–19 Uploading an image

The image is added to the image gallery.

Image Gallery

Folders

My Images

Recent Images

Folders > Sample Images

Add Subfolder

Images


Search

Search Images

Add Image

View Slide Show

Showing 1 result.



Taj Mahal

Showing 1 result.

FIGURE 4–20 Image uploaded to the folder

## ▼ To create Reference to an Image

### 1 Locate a document in the Document Library.

Using the example from the above section, locate the image *Taj Mahal* in the folder *Sample Images*.

### 2 Right click on the image, then select Properties to view its Address (URL).

You can then either highlight the entire URL or click anywhere over the URL area and press Ctrl+A to select the entire link. Keep in mind that the URL is long. If you use the highlight method, you must highlight the entire URL. You can then copy this link and reference it anywhere within the portal. You can even reference this document outside of the portal as long as your portal is running and the document is still in the repository.

Image Properties	
Location:	<a href="http://localhost:8080/image/image_gallery?img_id=10444">http://localhost:8080/image/image_gallery?img_id=10444</a>
Width:	116px
Height:	116px
Size of File:	3.55 KB (3632 bytes)
Alternate text:	Image

FIGURE 4–21 To create Reference to an Image

## ▼ To View Image Slide Show

### 1 Login to WebSynergy.

### 2 Click Add Applications and expand the CMS folder.

### 3 Click Add against the image gallery portlet.

The portlet is added to your page.



FIGURE 4–22 To view Image Slide Show

- 4 Click on a folder containing images.  
In our example, click on the *Sample Images* folder.

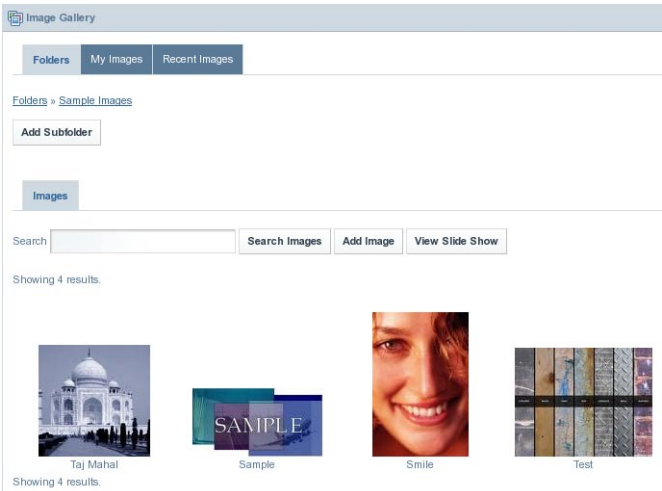


FIGURE 4–23 To view Image Slide Show

- 5 Click on **View Slide Show** button to have a slide show of the images contained in the folder.  
A new window appears. In the new window, images are displayed in sequence one after the other. The slide show window has buttons for Pause, Play, Next, and Previous, which allow you to play and pause the slide show, and to view next and previous image for an image. You can set a time interval for displaying images, by using the Speed list. You can set a time interval between 1 to 10 seconds, with 3 seconds being the default time interval for the slide show.



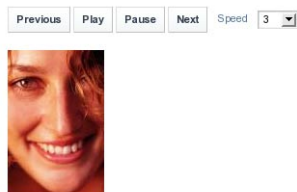


FIGURE 4–24 To view Image Slide Show

## Journal Portlets

The Journal application is composed of four portlets:

### *Journal*

- Is an administration portlet that allows the creating, updating searching and managing contents.

### Journal Articles

- Allows displaying of a set of contents that satisfy a set of conditions configured through the portlet preferences such as content type and community.

### Journal Content

- Allows displaying one or more contents manually selected from the list of available portlets. If more than one content is selected only one at a time will be shown and links will be added to allow the user to navigate to the rest of the contents.

### Journal Content Search

- Allows users to search for Journal content.

the Journal portlet is used to create all CMS content and the Journal Articles and Journal Content portlets are used to display those contents. This portlet allows writers to easily edit content displayed on web pages without having to sort through complex code.

## Definitions

Before getting into the details of how to use the Journal portlet, it is useful to understand structures, templates, and articles; they are the backbone of the Journal portlet's functionality.

- *Structures* define the type and number of content pieces (e.g. text, text area, images, selection lists, etc.)
- *Templates* determine how content pieces will be arranged or laid out
- *Articles* are where each content piece is populated with actual text and images

The point of a structure is to unify journal articles with the same numbers and types of items. For example, a Management Bio section of a website might have ten biographies, each requiring an image for the executive headshot, a text for the headline, and a text area for the main biography. A structure would be created with one image, one text, and one text area, each named accordingly. This allows writers to create the individual biographies and other texts without needing to recreate the page structure for each biography.

Designers can create several templates for one structure to allow for a variety of presentations or they can give writers discretion in deciding the best layout.

All specific text and images are entered when a user adds or edits an article. This is also where a user chooses the layout based on the templates affiliated with a structure. Since multiple templates can be associated to a structure, the user can select the template that formats their article the way they want.

## ▼ To add a Journal Portlet to the Page

- 1 **Login to WebSynergy.**
- 2 **Click Add Applications and expand the CMS folder.**
- 3 **Click Add against the Journal Portlet.**

The Journal Portlet is added to your page.



FIGURE 4–25 Journal Portlet

The user interface of the portlet contains *Articles*, *Structures*, *Templates*, *Feeds* and *Recent* tabs. You can search documents using the *Search Articles* button in the *Articles* tab. You can add an article using the *Add Article* button.

- 4 **Click the Articles tab to view all currently available Journal Articles.**

ID	Name	Version	Status	Modified Date	Display Date	Author	Actions
10334	Project WebSynergy	1.0	Not Approved	10/14/08 10:39 AM	10/14/08 10:20 AM	Admin User	Actions
10346	Project WebSynergy	1.0	Not Approved	10/14/08 10:54 AM	10/14/08 10:53 AM	Admin User	Actions
10351	Project WebSynergy	1.0	Expired	10/14/08 10:57 AM	10/14/08 10:55 AM	Admin User	Actions
10356	Project WebSynergy	1.0	Expired	10/14/08 11:00 AM	10/14/08 10:58 AM	Admin User	Actions
10361	Project WebSynergy	1.0	Approved	10/14/08 11:21 AM	10/14/08 11:15 AM	Admin User	Actions

FIGURE 4–26 Journal Articles displayed in the Journal portlet

## Structures

- “To create a Structure” on page 91
- “To Edit a Structure” on page 92
- “To Delete a Structure” on page 95

### ▼ To create a Structure

- 1 To create a structure, first click on the **Structures** tab in the **Journal Portlet**, and then click on the **Add Structure** button. The structure creation page is displayed.

Specify an ID, or Select the *Autogenerate ID* checkbox for the system to generate an ID. It is recommended that you choose your own ID so that the structure will be easier to identify when associating it with templates and articles. The convention is to separate words in the ID with a hyphen, e.g., “BASIC-STRUCTURE-NAME.” The structure ID can not be changed once your structure has been saved, so be sure that the ID is exactly how you would want it to appear.

Enter a name and a description for the structure.

To start adding fields to the structure, click the *Add Row* button. This will show a new field where you can enter a name and a content type for this field (image, text, boolean flag, etc.). Those comfortable with XML or HTML can edit the XSL directly by clicking *Launch Editor*. Both methods of adding/editing elements will work, and both can be used in the same session. One simple approach is to add a few elements using the GUI and then to edit the XML directly (which will contain the syntax for the already added elements and can be copy-pasted).

Empty spaces are not allowed within a field name. Rows can be moved up or down by clicking on Arrow buttons. You can use the Plus button to add a row.

Journal

Structure

ID

BASIC-WEBCAST

☐ Autogenerate ID

Name

Basic Webcast

Basic Webcast

Description

Permissions

[Configure »](#)

Save

Save and Continue

Cancel

XML Schema Definition

Add Row

Launch Editor

title

Text

size

Text

url

Text

description

Text Area (HTML)

FIGURE 4–27 To create a Structure

2 Click Save.

The Structure is created successfully.

Journal

[Return to Full Page](#)

✓ Your request processed successfully.

Articles

Structures

Templates

Feeds

Recent

Search

[Advanced »](#)

Search Structures

Add Structure

Delete

Showing 1 result.

ID	Description	
<a href="#">BASIC-WEBCAST</a>	<a href="#">Basic Webcast</a> <a href="#">Basic Webcast</a>	<div>Actions</div>

FIGURE 4–28 To create a Structure

▼ To Edit a Structure

- 1 Click on Actions tab against the Structure, and select Edit from the menu.

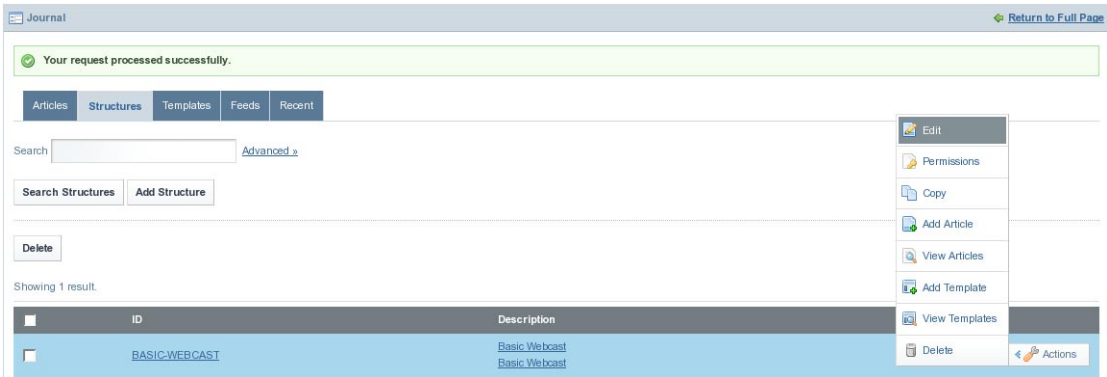


FIGURE 4–29 To edit a Structure

The Structure opens in Edit mode.

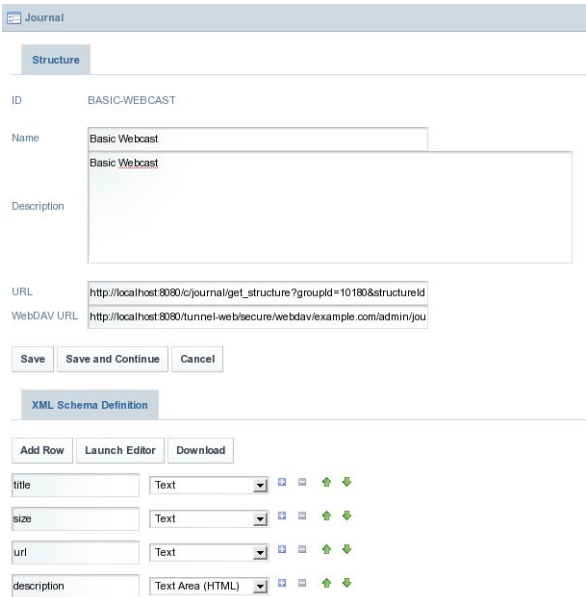


FIGURE 4–30 To edit a Structure

In the edit screen, you can edit anything in the structure except for the structure ID, which can not be changed once the structure has been created.

If you add fields, the articles associated will have extra fields for additional content. If you delete fields, associated content in associated articles will be deleted. For example, an article using the template Basic Webcast has title, size, url and description fields, as these are the fields available on the template.

Journal

Return to Full Page

Article

ID

Autogenerate ID

Name

Language

English (United States)

Default Language

English (United States)

Title

Localized

Size

Localized

Url

Localized

Style

Normal

Size

T

B

I

U

ABC

x<sub>2</sub>

x<sup>2</sup>

↶

↷

↺

↻

↵

↶

↷

↺

↻

↵

↶

↷

↺

↻

↵

↶

↷

↺

↻

↵

Source

Description

Localized

Permissions

Configure

Abstract

Description

Workflow

Status

New

Form and Presentation

Structure

Basic Webcast

Select

Remove

Template

Select

Categorization

Type

General

Tags

Add Tags

Or

Select Tags

Searchable

Schedule

Display Date

October

21

2008

4

27

AM

Expiration Date

October

21

2009

4

27

AM

Never Auto Expire

Review Date

July

21

2009

4

27

AM

Never Review

FIGURE 4-31 To edit a Structure

- 2 Make desired changes to the Structure, and click Save to save changes.**

▼ **To Delete a Structure**

- 1 To delete a structure, you must first delete all articles and disassociate or delete all templates associated with that structure.

To delete all articles, click on the *Actions* button and select *View Articles* from the menu.

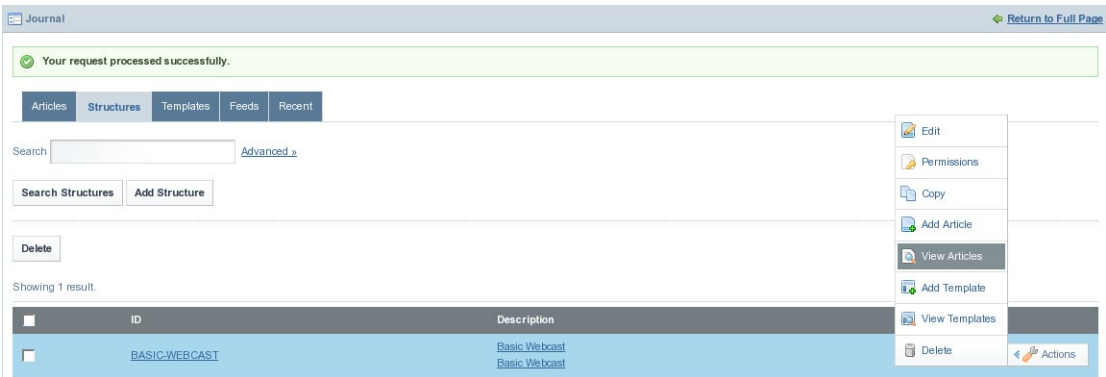


FIGURE 4–32 To delete a Structure

All the articles associated with the Structure are listed.

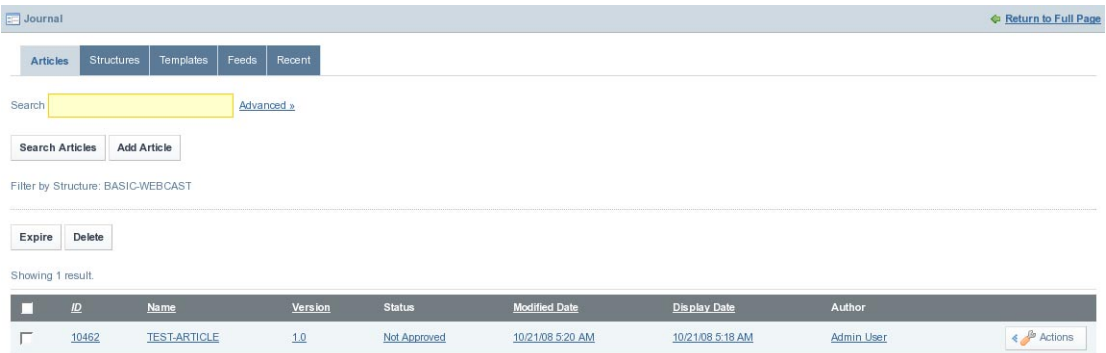


FIGURE 4–33 To delete a Structure

- 2 Select all articles, and click on the Delete button.

- 3 Click on the **Structure** tab again. Click on the **Actions** button against the Structure, and select **View Templates** from the menu.
- All the templates associated with the structure are listed.

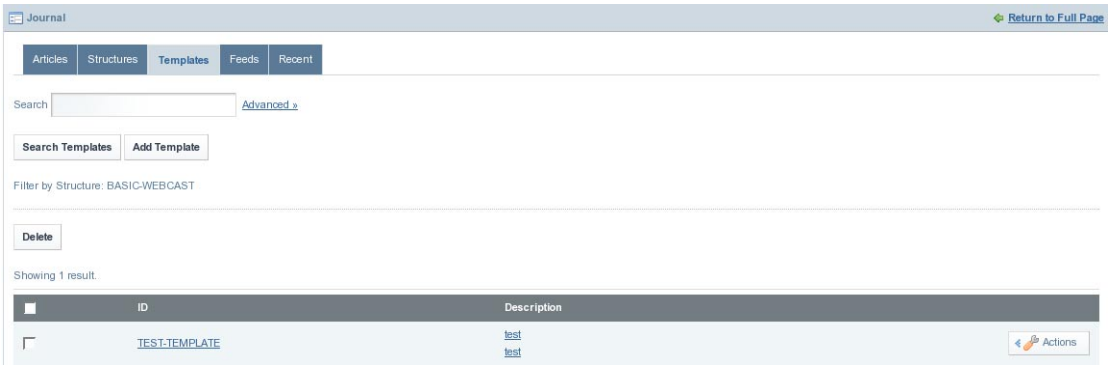


FIGURE 4–34 To delete a Structure

You can delete all the Templates associated with the Structure. To do this, select all Templates and then click the *Delete* button.

- 4 Select the Structure and click on the **Delete** button to delete the template.
- Alternatively, you click *Delete* from the menu appearing on clicking the *Actions* button.



FIGURE 4–35 To delete a Structure

## Templates

- “To Create a Template” on page 96
- “To Edit a Template” on page 100
- “To Delete a Template” on page 101

### ▼ To Create a Template

- 1 Login to WebSynergy.
- 2 Click Add Applications and expand the CMS folder.



**3 Click Add against Journal portlet.**

The *Journal* portlet is added to your page.

**4 Click on the Templates tab.**

Click the *Add Template* button to create a template. The *Template* page appears.

Journal

Template

ID  ☐ Autogenerate ID

Name

Description

Cacheable ☒

Structure

Language Type

Script

Format Script ☐

Small Image URL

-- OR -- Small Image ☐

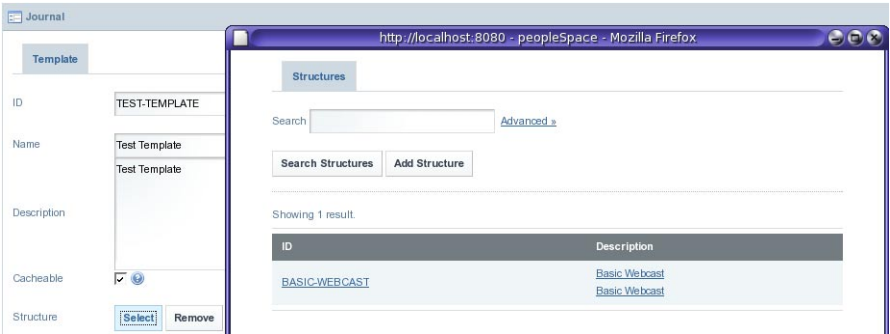
Use Small Image ☐

Permissions [Configure »](#)

**FIGURE 4–36** To create a Template

**5 Specify an ID, Name and Description for the template. Click the Select button to select a Structure for the template.**

The *Select* and *Remove* buttons against the *Structure* field can be used to associate or to disassociate a structure from the Template.

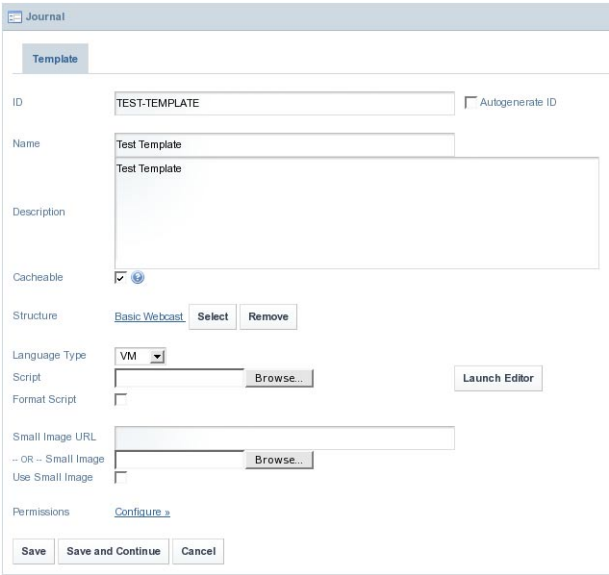


**FIGURE 4–37** To create a Template

A window for selecting Structures is launched.

**6 Click on name of the Structure to select it.**

In our example, click on *BASIC-WEBCAST*. The Structure is selected.



**FIGURE 4–38** To create a Template

**7 To edit the template layout content, you can use one of two methods:**

## 8 To create a completely new template:

### a. Click the Launch Editor button.

An Editor pops-up. You can select an Editor Type. *Plain* and *Rich* are the two available editor types. Plain is the default editor type, but you can select Rich, as it is easier to work with Rich editor.

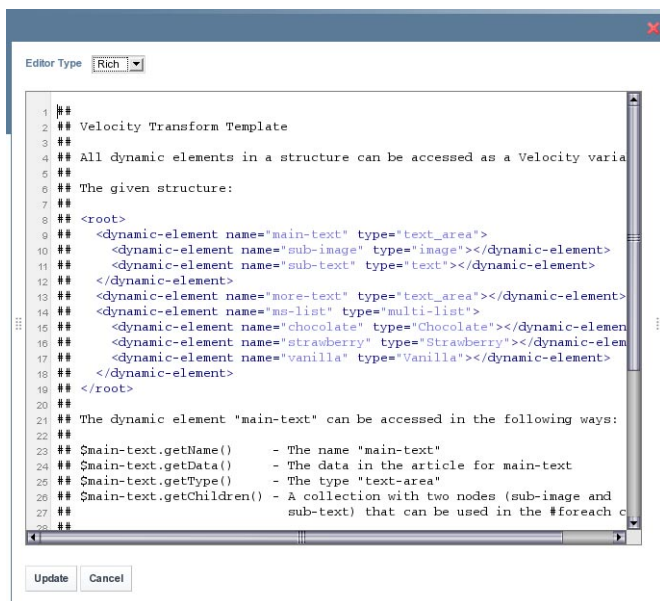


FIGURE 4-39 To create a Template

### b. Click on the Update button, after making changes to the template.

## 9 To make use of an existing template:

### a. Select a language from the Language Type list.

VM, SXL, and CSS are the available language options.

### b. Click on the Browse button against the Script field to browse an existing template.

### c. Select the Format Script checkbox.

### d. Click Launch Editor to open the browsed script

### e. Click on the Update button, after making changes to the script.

- 10 If you find it to be necessary, Add a small image to represent the template in the description field,

You can , enter the URL path for an image in the *Small Image URL* field, or you can browse an image by using the *Browse* button. To use the image in the template, select the *Use Small Image* checkbox.

- 11 Click Save.

▼ To Edit a Template

- 1 Click on the Actions button against the template, and select Edit from the menu.

Before editing the actual template, it is advisable to view the associated articles because their layout will be affected by any changes made to your structure. After editing the template, you can view these articles with the new template layout. You can click *View Articles* from the *Action* menu to view associated articles.

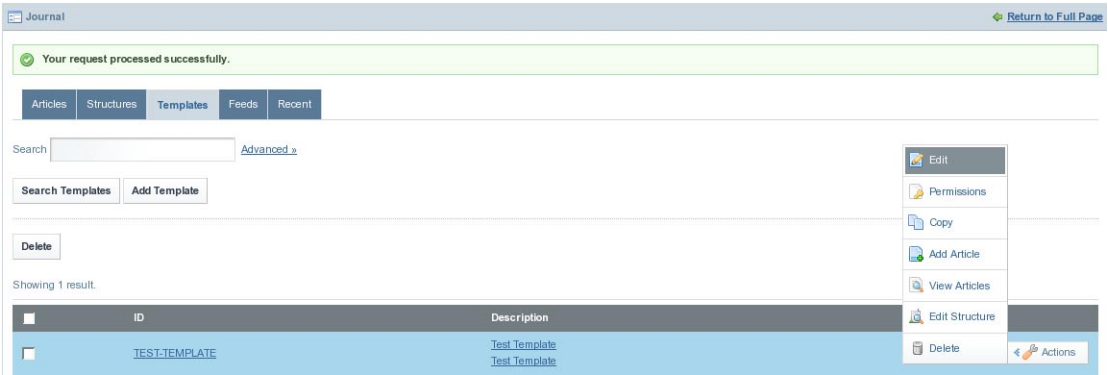


FIGURE 4–40 To edit a Template

- 2 Edit the template as desired.

In the edit screen, you can edit anything in the template except for the template ID, which can not be changed once the template has been created.

Journal

Template

ID

TEST-TEMPLATE

Name

Test Template

Description

Test Template

Cacheable

☒

URL

http://localhost:8080/c/journal/get\_template?groupId=10180&templateId=

WebDAV URL

http://localhost:8080/tunnel-web/secure/webdav/example.com/admin/jou

Structure

[Basic Webcast](#)

Language Type

VM

Script

[Browse...](#)

Format Script

☐

Small Image URL

-- OR -- Small Image

[Browse...](#)

Use Small Image

☐

[Save](#) [Save and Continue](#) [Cancel](#)

[Launch Editor](#) [Download](#)

FIGURE 4-41 To edit a Template

3 Click Save.

▼ To Delete a Template

- 1 To delete a template, you must first delete all the articles associated with that template.
- To delete all articles, click on the *Actions* button and select *View Articles* from the menu.

Journal [Return to Full Page](#)

Your request processed successfully.

Articles

Structures

Templates

Feeds

Recent

Search

[Advanced »](#)

[Search Templates](#)

[Add Template](#)

[Delete](#)

Showing 1 result.

	ID	Description	
<input type="checkbox"/>	<a href="#">TEST-TEMPLATE</a>	<a href="#">Test Template</a> <a href="#">Test Template</a>	<div><div> Edit</div><div> Permissions</div><div> Copy</div><div> Add Article</div><div> View Articles</div><div> Edit Structure</div><div> Delete</div><div> Actions</div></div>

FIGURE 4-42 To delete a Template

All the articles associated with the Template are listed.



FIGURE 4–43 To delete a Template

2 Select all articles, and click on the Delete button.

A dialog-box with the message “Are you sure you want to delete the selected articles?” appears. Click OK to delete all articles.

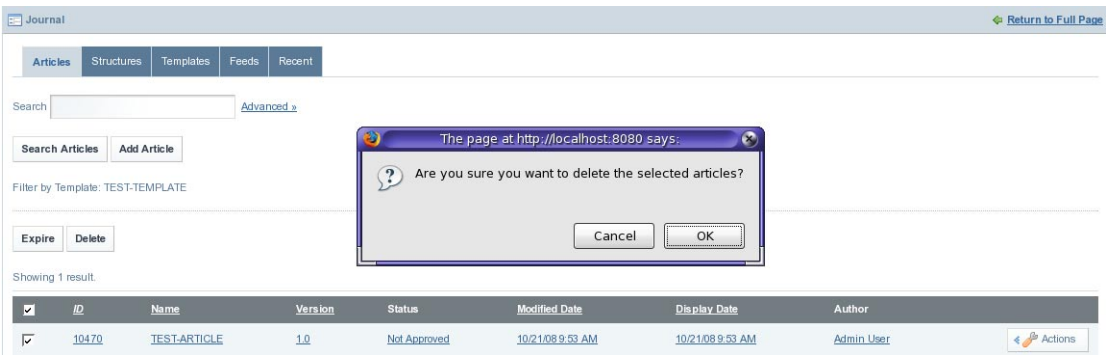


FIGURE 4–44 To delete a Template

3 Click on the Templates tag once again.

Select the template and click Delete.

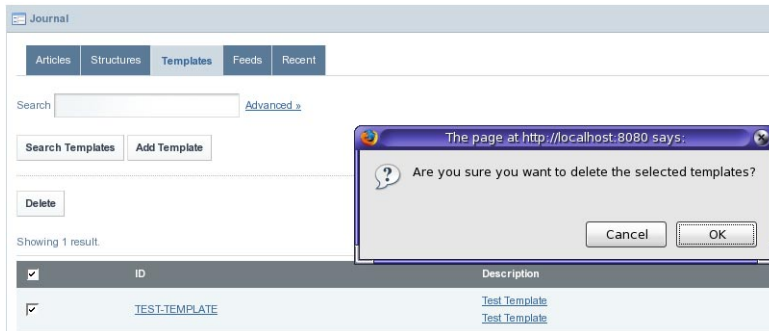


FIGURE 4–45 To delete a Template

Click **OK** on the dialog-box for confirming delete operation to delete the template.

## Articles

- “To Create an Article” on page 103
- “To Edit an Article” on page 107
- “To Delete an Article” on page 108

### ▼ To Create an Article

- 1 **Login to WebSynergy.**
- 2 **Click Add Applications and expand the CMS folder.**
- 3 **Click Add against Journal portlet.**  
The *Journal* portlet is added to your page.
- 4 **Click on the Articles tab.**  
All Journal articles are listed.

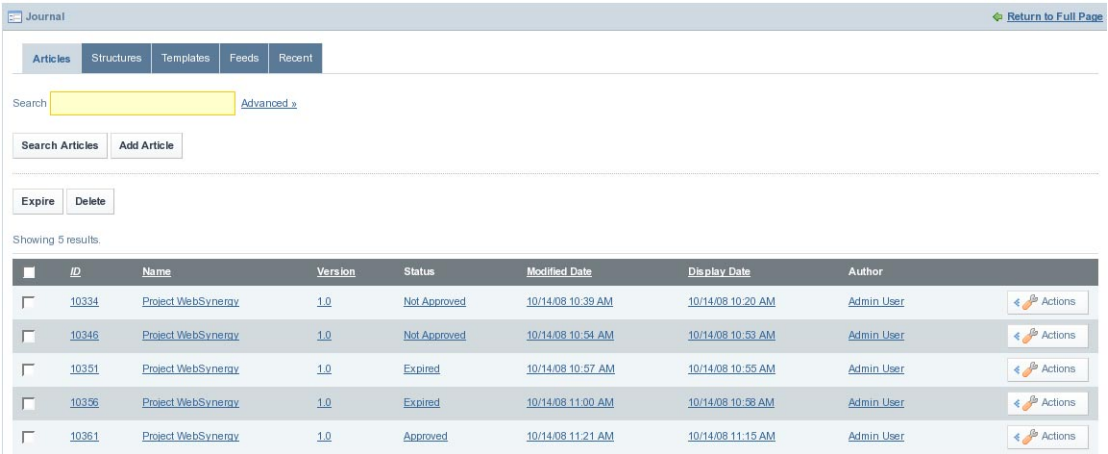


FIGURE 4–46 To create an Article

5 To create a new Journal Article, click on the Add Article button.

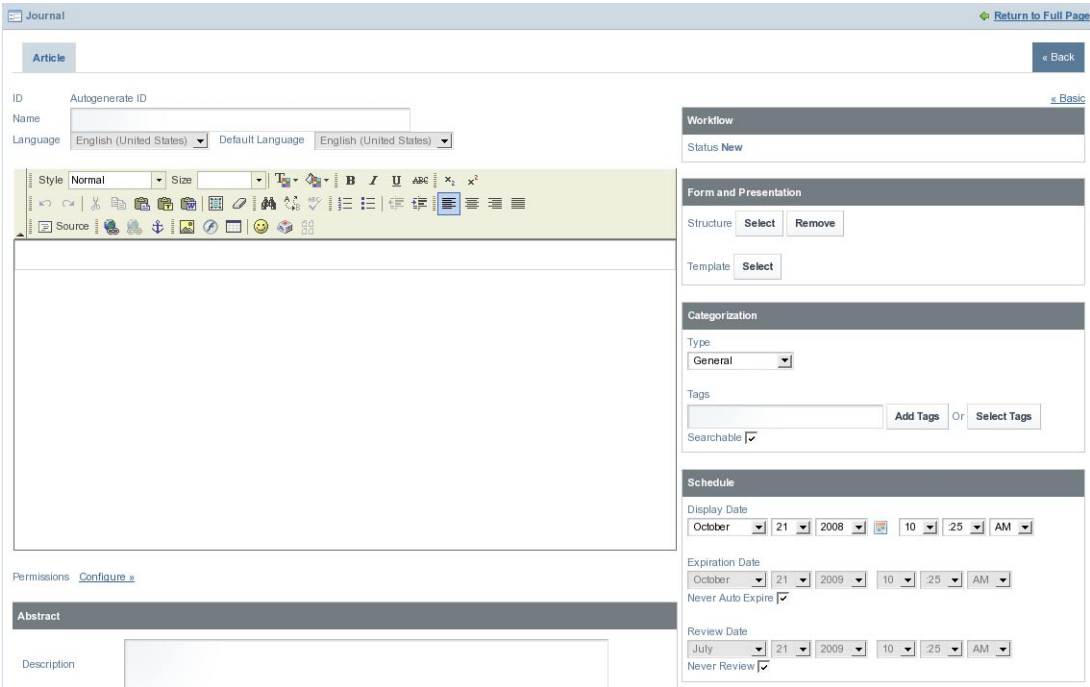


FIGURE 4–47 To create an Article



- 6 To select a Structure and a Template for the article, click on the Select button beside the Structure field.

You find the option to select a structure under *Farm and Presentation*.

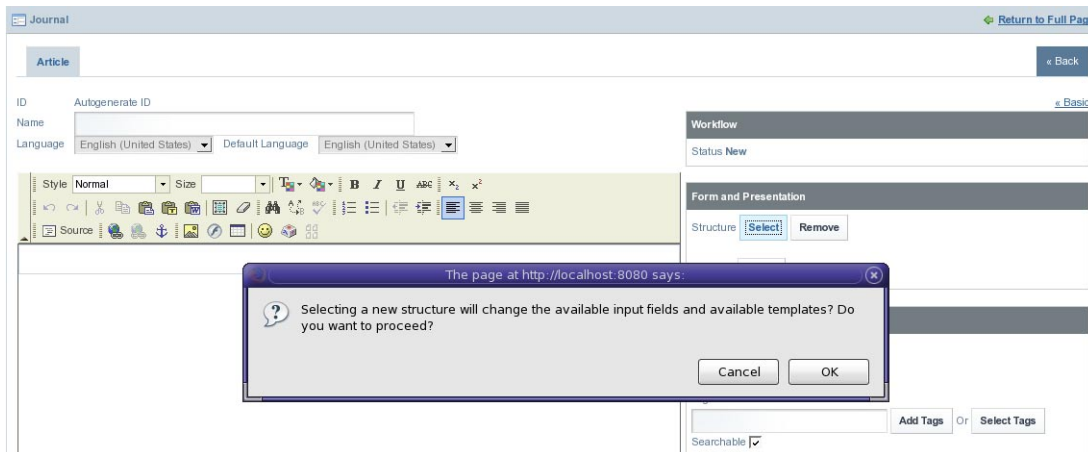


FIGURE 4-48 To create an Article

A dialog box appears with the message “Selecting a new structure will change the available input fields and available templates? Do you want to proceed?” appears. Click **OK**. The *Structures* window appears. You can select a structure by clicking on the name of a Structure. In our example, click on BASIC-WEBCAST to make it the Structure for the article.

You can note that the structure of the article has changed.

Journal

[Return to Full Page](#)

Article

« Back

IDAutogenerate ID

Name

LanguageEnglish (United States)Default LanguageEnglish (United States)

TitleLocalized

SizeLocalized

UrlLocalized

StyleNormalSizeT12345678910111213141516171819202122232425262728293031323334353637383940414243444546474849505152535455565758596061626364656667686970717273747576777879808182838485868788899091929394959697989910010110210310410510610710810911011111211311411511611711811912012112212312412512612712812913013113213313413513613713813914014114214314414514614714814915015115215315415515615715815916016116216316416516616716816917017117217317417517617717817918018118218318418518618718818919019119219319419519619719819920020120220320420520620720820921021121221321421521621721821922022122222322422522622722822923023123223323423523623723823924024124224324424524624724824925025125225325425525625725825926026126226326426526626726826927027127227327427527627727827928028128228328428528628728828929029129229329429529629729829930030130230330430530630730830931031131231331431531631731831932032132232332432532632732832933033133233333433533633733833934034134234334434534634734834935035135235335435535635735835936036136236336436536636736836937037137237337437537637737837938038138238338438538638738838939039139239339439539639739839940040140240340440540640740840941041141241341441541641741841942042142242342442542642742842943043143243343443543643743843944044144244344444544644744844945045145245345445545645745845946046146246346446546646746846947047147247347447547647747847948048148248348448548648748848949049149249349449549649749849950050150250350450550650750850951051151251351451551651751851952052152252352452552652752852953053153253353453553653753853954054154254354454554654754854955055155255355455555655755855956056156256356456556656756856957057157257357457557657757857958058158258358458558658758858959059159259359459559659759859960060160260360460560660760860961061161261361461561661761861962062162262362462562662762862963063163263363463563663763863964064164264364464564664764864965065165265365465565665765865966066166266366466566666766866967067167267367467567667767867968068168268368468568668768868969069169269369469569669769869970070170270370470570670770870971071171271371471571671771871972072172272372472572672772872973073173273373473573673773873974074174274374474574674774874975075175275375475575675775875976076176276376476576676776876977077177277377477577677777877978078178278378478578678778878979079179279379479579679779879980080180280380480580680780880981081181281381481581681781881982082182282382482582682782882983083183283383483583683783883984084184284384484584684784884985085185285385485585685785885986086186286386486586686786886987087187287387487587687787887988088188288388488588688788888989089189289389489589689789889990090190290390490590690790890991091191291391491591691791891992092192292392492592692792892993093193293393493593693793893994094194294394494594694794894995095195295395495595695795895996096196296396496596696796896997097197297397497597697797897998098198298398498598698798898999099199299399499599699799899910001001100210031004100510061007100810091010101110121013101410151016101710181019102010211022102310241025102610271028102910301031103210331034103510361037103810391040104110421043104410451046104710481049105010511052105310541055105610571058105910601061106210631064106510661067106810691070107110721073107410751076107710781079108010811082108310841085108610871088108910901091109210931094109510961097109810991100110111021103110411051106110711081109111011111112111311141115111611171118111911201121112211231124112511261127112811291130113111321133113411351136113711381139114011411142114311441145114611471148114911501151115211531154115511561157115811591160116111621163116411651166116711681169117011711172117311741175117611771178117911801181118211831184118511861187118811891190119111921193119411951196119711981199120012011202120312041205120612071208120912101211121212131214121512161217121812191220122112221223122412251226122712281229123012311232123312341235123612371238123912401241124212431244124512461247124812491250125112521253125412551256125712581259126012611262126312641265126612671268126912701271127212731274127512761277127812791280128112821283128412851286128712881289129012911292129312941295129612971298129913001301130213031304130513061307130813091310131113121313131413151316131713181319132013211322132313241325132613271328132913301331133213331334133513361337133813391340134113421343134413451346134713481349135013511352135313541355135613571358135913601361136213631364136513661367136813691370137113721373137413751376137713781379138013811382138313841385138613871388138913901391139213931394139513961397139813991400140114021403140414051406140714081409141014111412141314141415141614171418141914201421142214231424142514261427142814291430143114321433143414351436143714381439144014411442144314441445144614471448144914501451145214531454145514561457145814591460146114621463146414651466146714681469147014711472147314741475147614771478147914801481148214831484148514861487148814891490149114921493149414951496149714981499150015011502150315041505150615071508150915101511151215131514151515161517151815191520152115221523152415251526152715281529153015311532153315341535153615371538153915401541154215431544154515461547154815491550155115521553155415551556155715581559156015611562156315641565156615671568156915701571157215731574157515761577157815791580158115821583158415851586158715881589159015911592159315941595159615971598159916001601160216031604160516061607160816091610161116121613161416151616161716181619162016211622162316241625162616271628162916301631163216331634163516361637163816391640164116421643164416451646164716481649165016511652165316541655165616571658165916601661166216631664166516661667166816691670167116721673167416751676167716781679168016811682168316841685168616871688168916901691169216931694169516961697169816991700170117021703170417051706170717081709171017111712171317141715171617171718171917201721172217231724172517261727172817291730173117321733173417351736173717381739174017411742174317441745174617471748174917501751175217531754175517561757175817591760176117621763176417651766176717681769177017711772177317741775177617771778177917801781178217831784178517861787178817891790179117921793179417951796179717981799180018011802180318041805180618071808180918101811181218131814181518161817181818191820182118221823182418251826182718281829183018311832183318341835183618371838183918401841184218431844184518461847184818491850185118521853185418551856185718581859186018611862186318641865186618671868186918701871187218731874187518761877187818791880188118821883188418851886188718881889189018911892189318941895189618971898189919001901190219031904190519061907190819091910191119121913191419151916191719181919192019211922192319241925192619271928192919301931193219331934193519361937193819391940194119421943194419451946194719481949195019511952195319541955195619571958195919601961196219631964196519661967196819691970197119721973197419751976197719781979198019811982198319841985198619871988198919901991199219931994199519961997199819992000200120022003200420052006200720082009201020112012201320142015201620172018201920202021202220232024202520262027202820292030203120322033203420352036203720382039204020412042204320442045204620472048204920502051205220532054205520562057205820592060206120622063206420652066206720682069207020712072207320742075207620772078207920802081208220832084208520862087208820892090209120922093209420952096209720982099210021012102210321042105210621072108210921102111211221132114211521162117211821192120212121222123212421252126212721282129213021312132213321342135213621372138213921402141214221432144214521462147214821492150215121522153215421552156215721582159216021612162216321642165216621672168216921702171217221732174217521762177217821792180218121822183218421852186218721882189219021912192219321942195219621972198219922002201220222032204220522062207220822092210221122122213221422152216221722182219222022212222222322242225222622272228222922302231223222332234223522362237223822392240224122422243224422452246224722482249225022512252225322542255225622572258225922602261226222632264226522662267226822692270227122722273227422752276227722782279228022812282228322842285228622872288228922902291229222932294229522962297229822992300230123022303230423052306230723082309231023112312231323142315231623172318231923202321232223232324232523262327232823292330233123322333233423352336233723382339234023412342234323442345234623472348234923502351235223532354235523562357235823592360236123622363236423652366236723682369237023712372237323742375237623772378237923802381238223832384238523862387238823892390239123922393239423952396239723982399240024012402240324042405240624072408240924102411241224132414241524162417241824192420242124222423242424252426242724282429243024312432243324342435243624372438243924402441244224432444244524462447244824492450245124522453245424552456245724582459246024612462246324642465246624672468246924702471247224732474247524762477247824792480248124822483248424852486248724882489249024912492249324942495249624972498249925002501250225032504250525062507250825092510251125122513251425152516251725182519252025212522252325242525252625272528252925302531253225332534253525362537253825392540254125422543254425452546254725482549255025512552255325542555255625572558255925602561256225632564256525662567256825692570257125722573257425752576257725782579258025812582258325842585258625872588258925902591259225932594259525962597259825992600260126022603260426052606260726082609261026112612261326142615261626172618261926202621262226232624262526262627262826292630263126322633263426352636263726382639264026412642264326442645264626472648264926502651265226532654265526562657265826592660266126622663266426652666266726682669267026712672267326742675267626772678267926802681268226832684268526862687268826892690269126922693269426952696269726982699270027012702270327042705270627072708270927102711271227132714271527162717271827192720272127222723272427252726272727282729273027312732273327342735273627372738273927402741274227432744274527462747274827492750275127522753275427552756275727582759276027612762276327642765276627672768276927702771277227732774277527762777277827792780278127822783278427852786278727882789279027912792279327942795279627972798279928002801280228032804280528062807280828092810281128122813281428152816281728182819282028212822282328242825282628272828282928302831283228332834283528362837283828392840284128422843284428452846284728482849285028512852285328542855285628572858285928602861286228632864286528662867286828692870287128722873287428752876287728782879288028812882288328842885288628872888288928902891289228932894289528962897289828992900290129022903290429052906290729082909291029112912291329142915291629172918291929202921292229232924292529262927292829292930293129322933293429352936293729382939294029412942294329442945294629472948294929502951295229532954295529562957295829592960296129622963296429652966296729682969297029712972297329742975297629772978297929802981298229832984298529862987298829892990299129922993299429952996299729982999300030013002300330043005300630073008300930103011301230133014301530163017301830193020302130223023302430253026302730283029303030313032303330343035303630373038303930403041304230433044304530463047304830493050305130523053305430553056305730583059306030613062306330643065306630673068306930703071307230733074307530763077307830793080308130823083308430853086308730883089309030913092309330943095309630973098309931003101310231033104310531063107310831093110311131123113311431153116311731183119312031213122312331243125312631273128312931303131313231333134313531363137313831393140314131423143314431453146314731483149315031513152315331543155315631573158315931603161316231633164316531663167316831693170317131723173317431753176317731783179318031813182318331843185318631873188318931903191319231933194319531963197319831993200320132023203320432053206320732083209321032113212321332143215321632173218321932203221322232233223432253226322732283229323032313232323332343235323632373238323932403241324232433244324532463247324832493250325132523253325432553256325732583259326032613262326332643265326632673268326932703271327232733274327532763277327832793280328132823283328432853286328732883289329032913292329332943295329632973298329933003301330233033304330533063307330833093310331133123313331433153316331733183319332033213322332333243325332633273328332933303331333233

**Schedule**

Display Date  
 October 21 2008 11 21 AM

Expiration Date  
 October 21 2009 11 59 AM  
 Never Auto Expire ☒

Review Date  
 July 21 2009 11 59 AM  
 Never Review ☒

FIGURE 4–51 To create an Article

- 10 Create the article, and click Save.

## ▼ To Edit an Article

- 1 Click on the Actions button for the article and select Edit from the menu.

Journal [Return to Full Page](#)

Articles Structures Templates Feeds Recent

Search  [Advanced »](#)

[Search Articles](#) [Add Article](#)

[Expire](#) [Delete](#)

Showing 6 results.

	ID	Name	Version	Status	Modified Date	Display Date	Author		
<input type="checkbox"/>	10334	Project WebSynergy	1.0	Not Approved	10/14/08 10:39 AM	10/14/08 10:20 AM	Admin User		
<input type="checkbox"/>	10346	Project WebSynergy	1.0	Not Approved	10/14/08 10:54 AM	10/14/08 10:53 AM	Admin User		
<input type="checkbox"/>	10351	Project WebSynergy	1.0	Expired	10/14/08 10:57 AM	10/14/08 10:55 AM	Admin User		
<input type="checkbox"/>	10356	Project WebSynergy	1.0	Expired	10/14/08 11:00 AM	10/14/08 10:36 AM	Admin User		
<input type="checkbox"/>	10361	Project WebSynergy	1.0	Approved	10/14/08 11:21 AM	10/14/08 11:15 AM	Admin User		
<input type="checkbox"/>	10475	TEST-ARTICLE1	1.0	Not Approved	10/21/08 11:31 AM	10/21/08 11:21 AM	Admin User		

FIGURE 4–52 To edit an Article

The article appears in Edit mode. In this screen you can edit anything in the article except for the article ID, which can not be changed once the article has been created. You can choose to increment the version every time you edit the article to help all users see how often the article has been changed. If you feel that the changes you are making are very minor, you can choose not to increment it. Note that if you set the expiration date to a date earlier to the current date, you will no longer be able to select that article for use in the Journal Content portlet.

- 2 Make necessary changes and click Save.

▼ **To Delete an Article**

- **Click on the Actions button for the article and select Edit from the menu.**  
Alternatively, select the checkbox preceding the article ID and click the *Delete* button.

## Journal Articles Portlet

The Journal Articles Portlet is used to configure journal Articles. Generally, it is not necessary to access this portlet.

## Journal Content Portlet

The Journal Content Portlet displays the content of a journal article.

## Journal Content Search Portlet

The Journal Content Search Portlet can be used to search for a word or phrase within the content of a Journal Article.

For example, if you are searching with the keyword *WebSynergy*, the word is highlighted in your article.



FIGURE 4–53 Journal Content Search

## Asset Publisher Portlet

▼ **To add Asset Publisher Portlet to the Page**

- 1 **Login to WebSynergy.**
- 2 **Click Add Applications and expand the CMS folder.**

### 3 Click Add against Asset Publisher portlet.

The *Asset Publisher* portlet is added to your page.

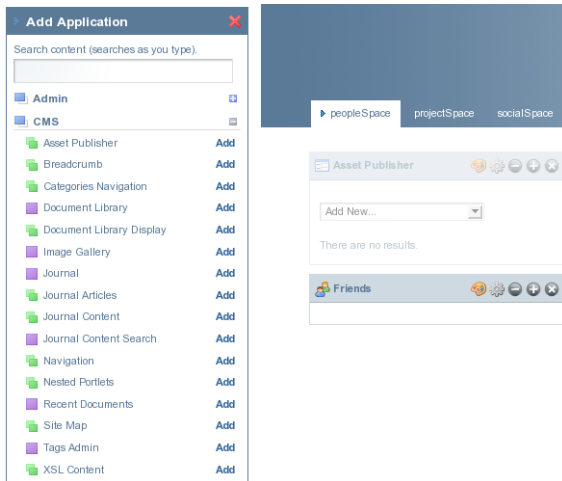


FIGURE 4–54 Asset Publisher portlet

## Blogs Entry

To be done.

### ▼ To add a Blogs Entry

- 1 Select Blogs Entry from the list on the Asset Publisher portlet.

**FIGURE 4–55** Page for entering the blog

The Blogs Entry page has many sophisticated options. You can apply styles and formatting on your blog entry. You can add Tags and Suggestions to your blog

## 2 Make your blog entry and click Publish.

The blog entries made by you are displayed on the *Asset Publisher* portlet. For example, you have made two blog entries with the name *Test*. The two blog entries are displayed on the Asset Publisher. The *Activities* portlet also states that a blog entry has been made.

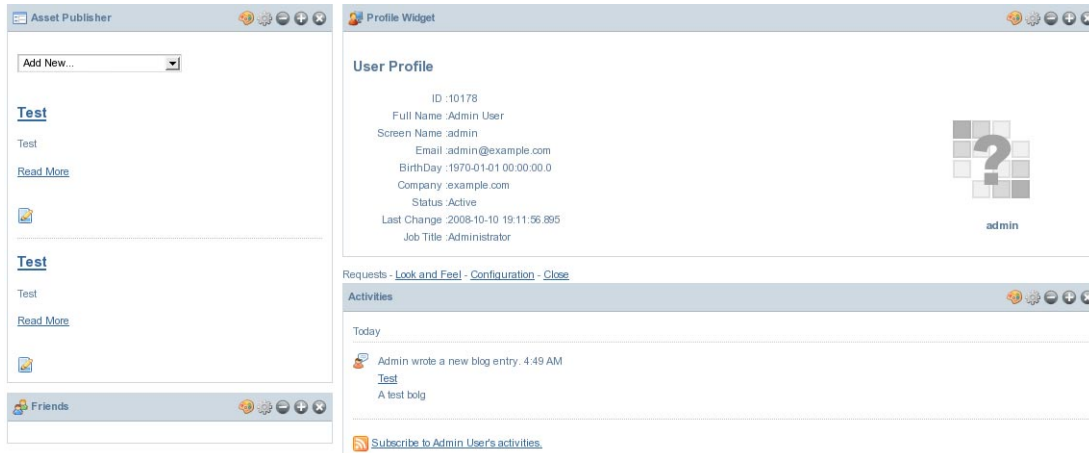


FIGURE 4–56 Blog entries

- 3 To view the blog entry, click on the blog title or on Read More.



FIGURE 4–57 Viewing the blog

- 4 You can edit the blog entry by clicking on the Edit button.

## Bookmarks Entry

To be done.

### ▼ To add a Bookmarks Entry

- 1 Select Bookmarks Entry from the list on the Asset Publisher portlet.

Bookmarks

Entry

Folder

Select

Name

Sun home

URL

http://sunweb.central.sun.com/

Description

Home page of Sun Microsystems Inc.

Tags

Add Tags

 Or 

Select Tags

Permissions

[Configure >](#)

Save

Cancel

FIGURE 4-58 Entering a bookmark

2 Enter the bookmark

3 Click Select to select a folder.

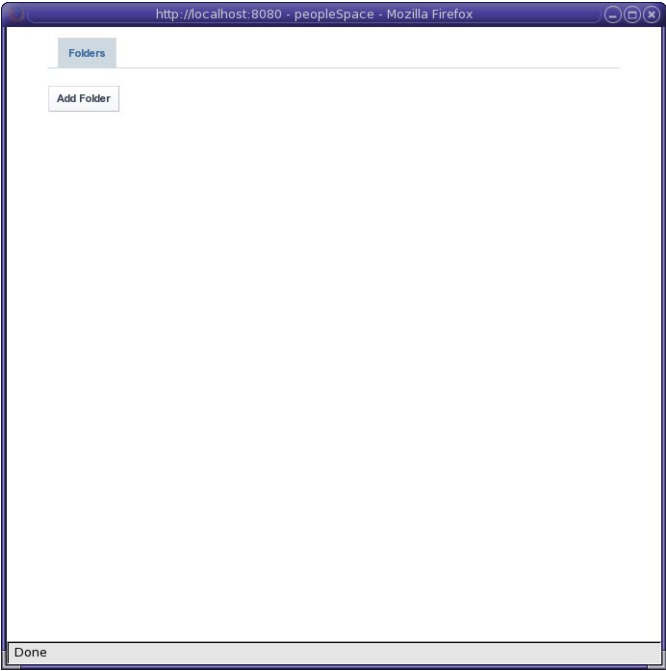


FIGURE 4-59 Selecting a folder



**4 Click Add Folder.**

**5 Specify the name and description of the folder.**

Click *Configure* against *Permissions* to view and change the configuration permissions for the folder.

The screenshot shows a web browser window titled 'http://localhost:8080 - peopleSpace - Mozilla Firefox'. The page has a 'Folder' tab and a 'Back' button. The 'Name' field is filled with 'SunURLs' and the 'Description' field is filled with 'URLs of Sun Microsystems'. Below these fields, there is a 'Permissions' section with a 'Configure' link. At the bottom, there are 'Save' and 'Cancel' buttons. A 'Done' button is visible at the very bottom of the page.

FIGURE 4-60 Adding a folder

**6 Click save to create the folder.**

The screenshot shows a web browser window titled 'http://localhost:8080 - peopleSpace - Mozilla Firefox'. The page has a 'Folders' tab and an 'Add Folder' button. Below the button, it says 'Showing 1 result.' and displays a table with the following data:

Folder	# of Folders	# of Entries
SunURLs	0	0

There is a 'Choose' button next to the 'SunURLs' row.

FIGURE 4-61 Choosing a folder for the bookmark

**7 Click on the Choose button to choose the folder.**

The screenshot shows a web browser window with a tab titled 'Bookmarks'. Below the tab is a form titled 'Entry'. The form has several fields: 'Folder' with a dropdown menu showing 'SunURLs' and a 'Select' button; 'Name' with a text box containing 'Sun home'; 'URL' with a text box containing 'http://sunweb.central.sun.com/'; 'Description' with a larger text box containing 'Home page of Sun Microsystems Inc.'; 'Tags' with a text box and buttons 'Add Tags' and 'Select Tags'; and 'Permissions' with a link 'Configure >'. At the bottom of the form are 'Save' and 'Cancel' buttons.

FIGURE 4–62 Saving the bookmark

**8 Click Save.**

The bookmark appears on the Asset Publisher portlet.



FIGURE 4–63 Bookmark for a page

**9 Click Go to view the bookmarked page.**

## Document Library Document

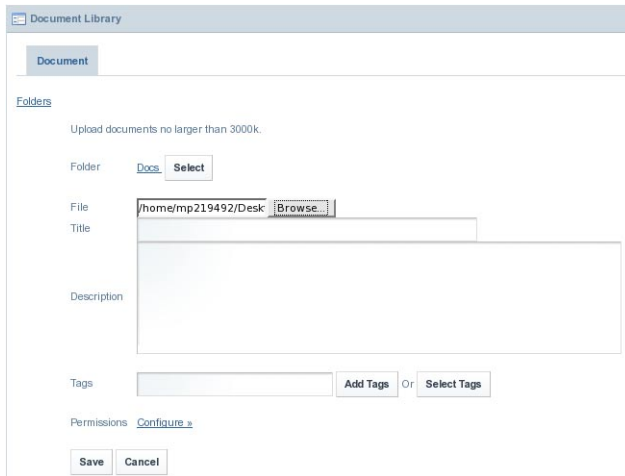
To be done.

### ▼ To add a Document Library Document

- 1 Select Document Library Document from the list on the Asset Publisher portlet.**

- 2 Click **Select** to select a folder as described in the [procedure](#) and browse a document to upload it to the **Document Library**.

In our example, we are creating a folder called *Docs*, and uploading a file named *Wedding Invitation*.



The screenshot shows the 'Document Library' window with a 'Document' tab selected. Under the 'Folders' section, there is a note 'Upload documents no larger than 3000k.' Below this, the 'Folder' field has a dropdown menu with 'Docs' selected and a 'Select' button. The 'File' field contains the path '/home/mp219492/Desktop' and a 'Browse...' button. There are empty text boxes for 'Title' and 'Description'. The 'Tags' section has an input field, 'Add Tags' and 'Select Tags' buttons, and an 'Or' separator. At the bottom, there is a 'Permissions' link labeled 'Configure...' and 'Save' and 'Cancel' buttons.

FIGURE 4–64 Adding a Document Library Document

- 3 Click **Save** to save the document to the Document Library.

The document is displayed on the Asset Publisher portlet. You can download the document if required.



FIGURE 4–65 Saving the document to the Document Library

## ▼ To Delete a Document from the Document Library

- 1 Select Document Library Document from the list on the Asset Publisher portlet.

Document Library

Document

Folders

Upload documents no larger than 3000k.

Folder

File

Title

Description

Tags   Or

Permissions [Configure](#)

FIGURE 4–66 Document Library page

**2 Click Select.**

All the documentation folders currently available are listed

**3 Click Choose against the folder containing the document.**

In our example, choose the *Docs* folder.

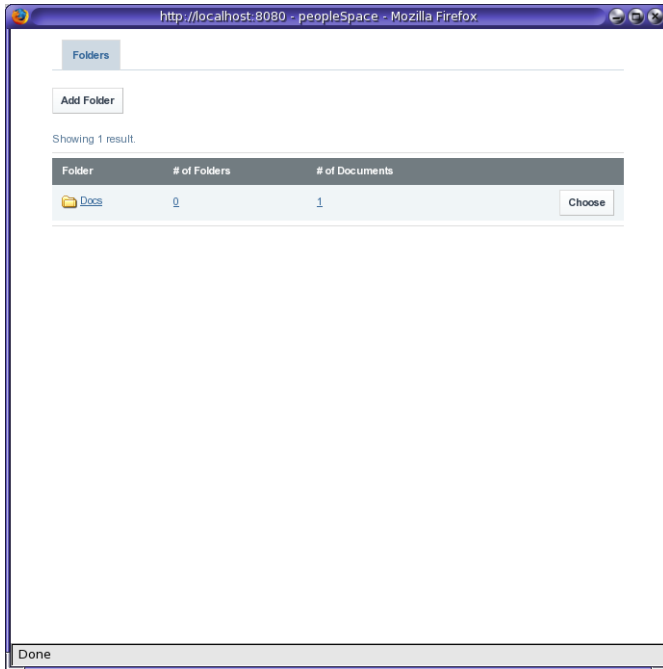


FIGURE 4-67 Choosing a documentation folder

The selected folder is added to the Document Library page. Note that a link for the folder appears near the *Select* button.

Document Library

Document

Folders

Upload documents no larger than 3000k.

Folder

Docs

Select

File

Browse...

Title

Description

Tags

Add Tags

Or

Select Tags

Permissions

Configure »

Save

Cancel

FIGURE 4–68 Selected folder (containing the document which need to be deleted)

- 4 Click on the link for the selected folder.
- 5 Select Delete from Actions, to delete the document.

Document Library

Return to Full Page

Folders

My Documents

Recent Documents

Folders » Docs

Add Subfolder

Documents

Search

Search File Entries

Add Document

Add Shortcut

Showing 1 result.

Document	Size	Downloads	Locked	Permissions
<div>Wedding Invitation.pdf</div>	307.5k	2	No	<div><div>Delete</div><div>Actions</div></div>

FIGURE 4–69 Deleting the document

## Image Gallery Image

To be done.

▼

### To add an Image Gallery Image

- 1 Select Image Gallery Image from the list on the Asset Publisher portlet.

- 2 The procedure to upload and delete images from the gallery are very much similar to the procedure to [To add a Document Library Document](#) and [To delete a document from the Document Library](#) respectively.

## Journal Article

To be done.

### ▼ To add a Journal Article

- 1 Select Journal Article from the list on the Asset Publisher portlet.

The screenshot shows the 'Journal Article' form in the CMS interface. The form is divided into several sections:

- Article Section:** Includes fields for ID (Autogenerate ID), Name (Project WebSynergy), Language (English (United States)), and Default Language (English (United States)). There is a 'Back' button and a 'Return to Full Page' link.
- Workflow Section:** Includes a 'Status' dropdown menu set to 'New'.
- Form and Presentation Section:** Includes 'Structure' (Select, Remove) and 'Template' (Select) buttons.
- Categorization Section:** Includes a 'Type' dropdown menu set to 'General'.
- Tags Section:** Includes a 'Tags' input field, 'Add Tags' and 'Select Tags' buttons, and a 'Searchable' checkbox checked.
- Schedule Section:** Includes 'Display Date' and 'Expiration Date' dropdown menus. The 'Display Date' is set to October 14, 2008, 10:40 AM. The 'Expiration Date' is set to October 14, 2009, 10:40 AM. There is a 'Never Auto Expire' checkbox checked.
- Review Date Section:** Includes a 'Review Date' dropdown menu set to July 14, 2009, 10:40 AM. There is a 'Never Review' checkbox checked.
- Permissions Section:** Includes a 'Configure' link.
- Abstract Section:** Includes a 'Description' text area, a 'Small Image URL' input field, and a 'Browse...' button. There is also a 'Use Small Image' checkbox.
- Buttons:** At the bottom, there are four buttons: 'Save', 'Save and Continue', 'Save and Approve', and 'Cancel'.

FIGURE 4-70 Adding a Journal Article

You can create a journal article using all the options available on the screen. You can set an *Expiration Date* and *Review Date* for the journal article.

**2 Click Save and Approve.**

The journal article is displayed on the Asset Publisher portlet. In our example, *Project WebSynergy* is the name of the journal article.



**FIGURE 4–71** Journal Article visible on the Asset Publisher

**3 Click the edit button to make changes to the journal article.**

The default version number of the Journal Article is set to *1.0*. You can select the *Increment Version on Save* option to increment the version number of the article, each time you update the article. You can use the *Expire* button to make the article expire immediately. You can use the *Delete* button to delete the article.



Journal [Return to Full Page](#)

✓ Your request processed successfully.

**Article** [Back](#)

ID: 10361

Name: Project WebSynergy

Language: English (United States) Default Language: English (United States)

**Workflow**  
Version: 1.0

Status: Approved

Increment Version on Save: ☐

**Form and Presentation**  
Structure: [Select](#) [Remove](#)  
Template: [Select](#)

**Categorization**  
Type: General

Tags:  [Add Tags](#) Or [Select Tags](#)  
Searchable: ☒

**Schedule**  
Display Date: October 14 2008 11:15 AM  
Expiration Date: October 14 2009 11:28 AM  
Never Auto Expire: ☒  
Review Date: July 14 2009 11:28 AM  
Never Review: ☒

**Abstract**  
Description:   
Small Image URL:   
-- OR -- Small Image:  [Browse...](#)  
Use Small Image: ☐

[Save](#) [Save and Continue](#) [Cancel](#)

FIGURE 4-72 Editing the Journal Article

- 4 Click **Save** to save changes to the article.
- 5 Click **Read More** link for the journal article to read the article.

## Breadcrumb Portlet

It displays the path for the page which you are on.

## Categories Navigation Portlet

To be done.

It displays an empty portlet. Do we really have anything to document???

## Navigation Portlet

To be done.

It displays an empty portlet. Do we really have anything to document???

## Nested Portlets Portlet

To be done.

It displays an empty portlet. Do we really have anything to document???

## Recent Documents Portlet

It displays the most recent documents.

## Site Map Portlet

The site map portlet provides the site mapping of your page.



FIGURE 4–73 Site Map Portlet

## Tags Admin Portlet

To be done.

### ▼ To add Tags Admin portlet to the Page

- 1 Login to WebSynergy.
- 2 Click Add Applications and expand the CMS folder.
- 3 Click Add against the Tags Admin Portlet.

The Tabs Admin portlet is added to your page.

Tags Admin

Vocabularies Search

tags-sets Add Tag

Categories Save

No entries were found.

Delete Vocabulary

FIGURE 4-74 Tags Admin Portlet

#### 4 Add a tag and a tag category and click Save.

Tags Admin

Vocabularies Search

tags-sets Add Tag portlet

Categories WebSynergy Save

No entries were found.

Delete Vocabulary

FIGURE 4-75 Adding a tag and a tag category

The tag and the tag category are added to the vocabulary.

Tags Admin

Vocabularies Search

tags-sets Categories Add Tag portlet WebSynergy

Save

No entries were found.

Delete Vocabulary

FIGURE 4-76 Tag vocabulary

You can Add or Delete the properties associated with the tag.

## XSL Content Portlet

To be done.

## Workflow Portlet

Admin users can define a workflow and upload the workflow definition file through the Workflow Portlet UI, and can initiate a workflow instance. To create a workflow, you need a Workflow Definition File which has a workflow defined in it.

To create a workflow, you need to create a Workflow Definition File in XML format. The Workflow Definition File need to confirm to *jBPM Process Definition Language (JPD)* standards.

For example, consider that we are creating a workflow for leave application and approval process.

The following is the scenario involved:

1. The admin user creates a workflow definition called LeaveApproval.
2. The admin user creates a workflow instance. (Workflow State 1)
3. The test user uses the workflow instance to apply for leave. (Workflow State 2)
4. The manager receives the holiday request. The manager the approve or reject the request, or can send the request for reconsideration. (Workflow State 2)
5. The test user can verify to see that the process have ended.

Refer to the below sections for detailed process steps:

1. [“To add a Workflow Definition” on page 124](#)
2. [“To Create a Workflow Instance” on page 125](#)
3. [“Workflow Process Steps: To Request an Holiday” on page 127](#)
4. [“Workflow Process Steps: To Evaluate Holiday Request” on page 128](#)
5. [“Workflow Process Steps: To Ascertain the Request Status” on page 128](#)

### ▼ To add a Workflow Definition

- 1 **Login to WebSynergy as Admin User.**
- 2 **Click on Add Page.**
- 3 **Specify a name for the page and click Save.**

- 4 Click on the tab for the page.  
The page opens.
- 5 Click on Add Applications from the Welcome menu, and add the Workflow portlet to the page.
- 6 Click On Add Definition.
- 7 Copy paste the workflow definition in XML format and click on the Save New Version button.

Workflow

Definition

Enter the workflow definition below in XML format.

```
<process-definition name="LeaveApproval">
  <!-- Event Logging -->
  -
  <event type="node-enter">
    <script>
      System.out.println("Entering node " + node.getName());
    </script>
  </event>
  <event type="node-leave">
    <script>
      System.out.println("Leaving node " + node.getName());
    </script>
  </event>
  <!-- Swimlanes -->
  -
  <swimlane name="admin">
    <assignment class="com.liferay.jobcm.handler.IdentityAssignmentHandler"
    config-type="field">
      <type>user</type>
      <companyId>10113</companyId>
      <id>10177</id>
    </assignment>
  </swimlane>
  -
  <swimlane name="approver">
    <assignment class="com.liferay.jobcm.handler.IdentityAssignmentHandler"
    config-type="field">
      <type>user</type>
      <companyId>10113</companyId>
    </assignment>
  </swimlane>
</process-definition>
```

Permissions [Configure](#)

FIGURE 4-77 To add a Workflow Definition

A workflow is created with a version number associated with it.

- 8 Logout and login back into WebSynergy for the changes to take effect.

## ▼ To Create a Workflow Instance

- 1 Click on Search Definitions from the Workflow portlet to view all workflow definitions.



FIGURE 4–78 To Create a Workflow Instance

2 Click on the Add Instances button against a workflow definition.

In our example, we are creating an instance for version 1.0 of the *LeaveApproval* workflow definition.



FIGURE 4–79 To Create a Workflow Instance

An instance is created for the Workflow Definition. Provide values for the fields such as the *Definition Name*, *Definition Version*, *Start Date (Range)*, and *End Date (Range)*, and Click *Search* to search for the instance. To hide the instances that have already ended, select the *Hide the instances that have already ended* checkbox.

You can create any number of instances for a version of Workflow Definition.

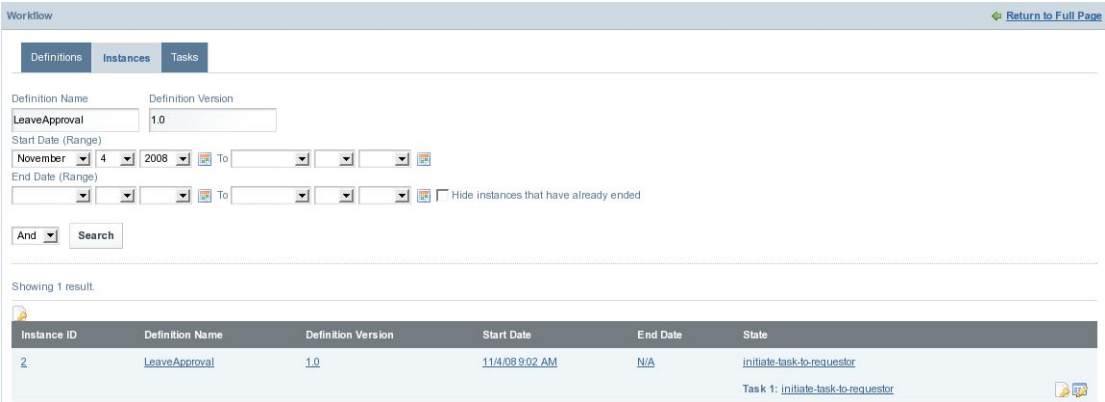


FIGURE 4–80 To Create a Workflow Instance

- 3 Click on the Manage button for the instance.



FIGURE 4–81 Manage button

- 4 Click Save to save the task.

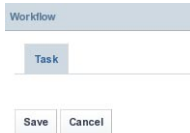


FIGURE 4–82 To Create a Workflow Instance

The task is assigned to the requester.

---

**Note** – If the admin user clicks the Signal button against an Instance, the instance is promoted to the next state of workflow. The requester is not allowed to use an instance which is promoted to the next state of the workflow.

---

## Accessing a Workflow Instance

To be done.

### ▼ Workflow Process Steps: To Request an Holiday

- 1 Login to WebSynergy as Paul, the test user.

- 2 Add the Workflow portlet to your page.

- 3 Click on Tasks tab.

You can use the *Task Name*, *Definition Name*, *Current Date*, *Start Date*, and *End Date* fields to search for a task. To hide the instances that have already ended, select the *Hide the instances that have already ended* checkbox.

- 4 Click on a Task for an Instance which have not ended.

In our example, click on the *Holiday Request* task for an Instance. Specify a start date and an end date.

Workflow

Task

Start Date

December 15 2008

End Date

December 31 2008

Save Cancel

FIGURE 4–83 Workflow Process Steps: To Request an Holiday

- 5 Click Save.

## ▼ Workflow Process Steps: To Evaluate Holiday Request

- 1 Login to Project WebSynergy as Mary Manager.
- 2 Add the Workflow portlet to your page.
- 3 Click on Tasks tab.
- 4 Click on a Task for an Instance which have not ended.

In our example, click on the *Evaluate Holiday Request* task for an Instance.

The manager can place Comments against the request. The manager can exercise *Approve*, *Reject*, and *Send Back for Review* options.

The Instance ends on clicking the *Approve* or *Reject* button.

## ▼ Workflow Process Steps: To Ascertain the Request Status

- 1 Login to Project WebSynergy as Paul, the test user.
- 2 Add the Workflow portlet to your page.
- 3 Click on Tasks tab.

The *End Date* field against the task name has the date and time of approval on it



## Web Services for Remote Portlets

---

WSRP 2.0 is an OASIS standard that simplifies integration of remote applications and content into portals. The WSRP standard defines presentation-oriented, interactive web services with a common, well-defined interface and protocol for processing user interactions and for providing presentation fragments suited for mediation and aggregation by portals as well as conventions for publishing, finding and binding such services.

Because the WSRP interfaces are common and well-defined, all web services that implement the WSRP standard plug into all WSRP compliant portals - a single, service-independent adapter on the portal side is sufficient to integrate any WSRP service. As a result, WSRP is the means for content and application providers to provide their services to organizations running portals with no programming effort required.

See the WSRP 2.0 standard for more information:

[http://www.oasis-open.org/committees/tc\\_home.php?wg\\_abbrev=wsrp](http://www.oasis-open.org/committees/tc_home.php?wg_abbrev=wsrp)

The implementation of the WSRP 2.0 standard in Project WebSynergy includes both the WSRP consumer and the WSRP producer. The WSRP producer implementation supports publishing [JSR286](#) portlets for use by a remote WSRP consumer. The [JSR286](#) portlets are deployed locally on a portal server. These portlets can be published by an instance of the WSRP producer.

## WSRP for Project WebSynergy

- “Adding WSRP Portlets to the Page” on page 129
- “WSRP Administration” on page 130

### Adding WSRP Portlets to the Page

You need to add the *WSRP Producer Admin* and *WSRP Consumer Admin* portlets to your page. These two portlets hold the WSRP functionality.

Generally, in any real life scenario, WSRP Producer and WSRP Consumer are on different machines, with WSRP Consumer running on a remote machine. For the sake of simplicity, we are using WSRP Producer Admin and WSRP Consumer Admin portlets from a single WebSynergy installation.

▼ **To add WSRP Portlets to the Page**

- 1 Login to WebSynergy as Admin user.
- 2 Click on Add Applications from the welcome menu, and type 'wsrp' in the search field.

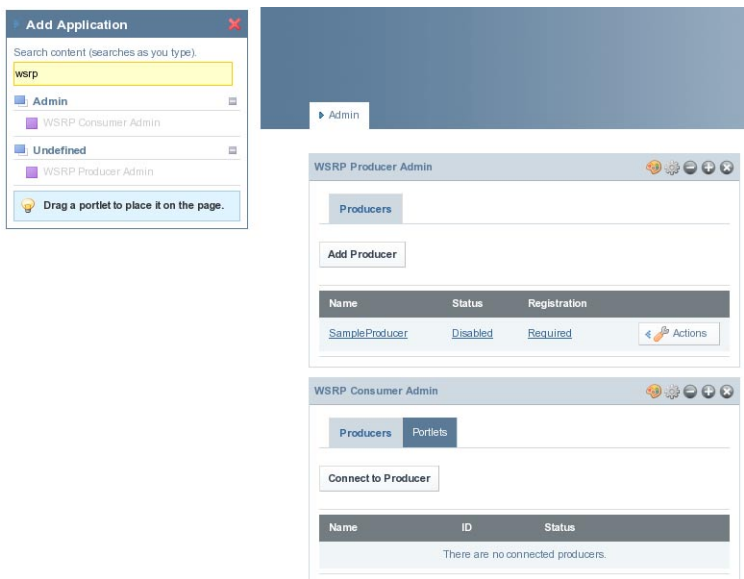


FIGURE 5-1 To add WSRP portlets to your page

The *WSRP Consumer Admin* and *WSRP Producer Admin* are listed.

- 3 Add the portlets to your page, by clicking on the Add button.

## WSRP Administration

The WSRP Producer Admin and WSRP Consumer Admin portlets provide WSRP Administration functionality.

- “Creating a WSRP Producer” on page 131
- “Creating a WSRP Consumer” on page 133

- [“Creating WSRP Producers and Consumers Without Registration” on page 135](#)
- [“Installing Remote/WSRP Portlets” on page 136](#)

## Creating a WSRP Producer

The WSRP Producer Admin portlet could be used for creating and managing WSRP Producers. There exists the default producer called *SampleProducer* which is disabled by default.

- [“To Enable the Default WSRP Producer” on page 132](#)
- [“To Create a new WSRP Producer” on page 133](#)

## What is a WSRP Producer?

A WSRP Producer offers locally deployed portlets for remote deployment. A remotely deployed WSRP Consumer Admin portlet can connect to the Producer, and can use the portlets offered by the Producer.

A portal can host multiple producers. The consumer can import remote portlets offered by a producer. Based on the portlets that you want to provide to WSRP consumers, you may create one or more producers. A producer can support registration or it does not require registration. If a producer supports registration, then consumers must register to work with the producer.

## Inband and Outband Registration

Registration is used to build a technical or business relationship between the consumer and the producer. While creating a producer, you can define any one of the following registration mechanisms: Inband registration or Outband registration.

If the producer requires registration and enabled for Inband registration, the consumer can provide the details through WSRP interface and register with the producer. Consumer is also provided an option to register through Outband communication. That is, consumer can provide the registration handle obtained through Outband communication.

If the producer requires registration and enabled for Outband registration, the consumer should obtain the registration handle through Outband communication and provide the registration handle during registration. Outband registration happens with manual intervention such as phone calls, email, and so on. For a producer that supports Outband registration, the producer gets the details about the consumer through Outband communication, and it creates a registration handle for the consumer. The registration handle is communicated to the consumer through Outband communication.

## Producers Without Registration

For a producer that does not require registration, consumer is not required to enter any information or get any information through Outband communication. In this case, the consumer can not customize (or edit) the portlets offered by the producer. The producer that does not support registration provides Read-Only portals to the consumers.

▼ **To Enable the Default WSRP Producer**

- 1 Click on the **Sample Producer** link in the WSRP Producer Admin portlet.  
The Producer named *SampleProducer* opens.

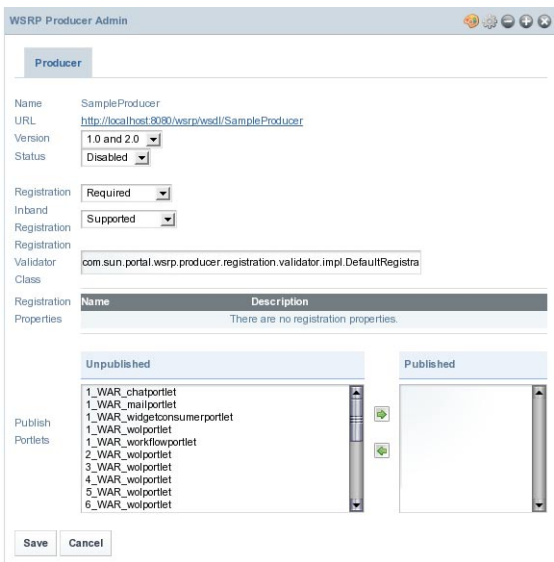


FIGURE 5–2 To enable the default WSRP Producer  
Move some portlets from *Unpublished* to *Published*.



- FIGURE 5–3 To enable the default WSRP Producer
- 2 Click **Save**.  
The Producer is saved.

### 3 Click on the Disabled link.

This opens the Producer again. Select *Enabled* from the *Status* list and click *Save*. The *SampleProducer* is enabled.

---

**Note** – By default the above created WSRP producer exports both WSRP version 1.0 and WSRP version 2.0 services in the exported WSDL. On checking the WSDL URL, both version 1.0 and version 2.0 services could be observed.

---

## ▼ To Create a new WSRP Producer

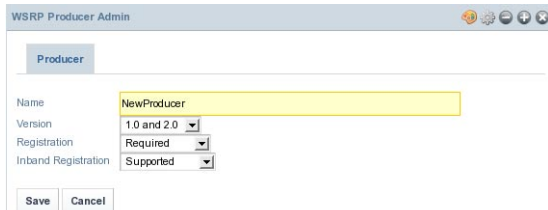
### 1 Click on the Add Producer button in the WSRP Producer Admin portlet.

Specify a name for the Producer. In our example, we are creating a Producer called *NewProducer*. This screen also provides option to export a version of wrsp service (choose both 1.0 and 2.0) for exporting both version 1.0 and version 2.0 service.

---

**Note** – The name of the Producer or a Consumer must not contain empty spaces or any special characters.

---



The screenshot shows the 'WSRP Producer Admin' window. Inside, there's a 'Producer' tab. The form has the following fields: 'Name' with the value 'NewProducer', 'Version' with a dropdown set to '1.0 and 2.0', 'Registration' with a dropdown set to 'Required', and 'Inband Registration' with a dropdown set to 'Supported'. At the bottom are 'Save' and 'Cancel' buttons.

FIGURE 5–4 To Create a new WSRP Producer

### 2 Click Save.

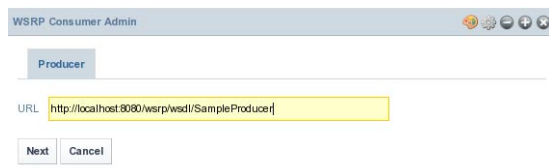
The Producer is created, but the new Producer will be disabled by default. Enable the Producer by following the [procedure](#).

## Creating a WSRP Consumer

To communicate with the portlets offered by the producer, a consumer needs to add a configured producer. The WSRP Consumer Admin portlet could be used for creating and managing WSRP Consumers. To create a consumer a producer WSDL URL is required. You can choose the WSDL URL from the "SampleProducer" created in the above step.

## ▼ To create a WSRP Consumer

- 1 Click on the 'Connect to Producer' button from the 'Producers' tab in the 'WSRP Consumer Admin' portlet.
- 2 Provide the WSRP Producer WSDL URL and click Next.



WSRP Consumer Admin

Producer

URL

Next Cancel

FIGURE 5–5 To create a WSRP Consumer

The next screen prompts to choose the WSRP version. Choose *Version 2.0* and click *Next*.



WSRP Consumer Admin

Producer

URL

Version

Next Cancel

FIGURE 5–6 To create a WSRP Consumer

The next screen prompts you to select a registration type. *Inband* and *Outband* are the two registration types. It is optional to specify *Name* and *Lifetime* for the consumer.

WSRP Consumer Admin

**Producer**

Name: SampleConsumer

URL: <http://localhost:8080/wsrf/wsdl/SampleProducer>

Version: 2.0

Registration Type: Inband

Name	Value	Description
There are no registration properties.		

Lifetime: ☐

Save Cancel

FIGURE 5-7 To create a WSRP Consumer

In case of Outband registration, you have to specify a registration handle. Select Inband registration and click *Save*. The consumer is created.

## Creating WSRP Producers and Consumers Without Registration

If the producer does not require registration, the consumer is not required to enter any details while adding a configured producer.

- “To Create a Producer without Registration” on page 135
- “To Create a Consumer without Registration” on page 136

### ▼ To Create a Producer without Registration

- 1 Click on the Add Producer button in the WSRP Producer Admin portlet. Specify a name for the producer. Select *Not Required* from the list for *Registration*.

WSRP Producer Admin

**Producer**

Name: RegistrationFreeProducer

Version: 1.0 and 2.0

Registration: Required

Inband Registration: Not Required

Save Cancel

FIGURE 5-8 To Create a Producer without Registration

- 2 Click *Save*.

The Producer is created, but the new Producer will be disabled by default. Enable the Producer by following the [procedure](#).

▼ **To Create a Consumer without Registration**

- 1 Click on the 'Connect to Producer' button from the 'Producers' tab in the 'WSRP Consumer Admin' portlet.
- 2 Provide the WSDL URL of a Producer without registration click Next.
- 3 The next screen prompts to choose the WSRP version. Choose Version 2.0 and click Next.
- 4 Specify a name for the Consumer and Click Save.



FIGURE 5–9 To Create a Consumer without Registration

**Installing Remote/WSRP Portlets**

To be done.

▼ **To install a Remote/WSRP Portlet**

- 1 Click on the 'Actions' button against a Consumer from the 'WSRP Consumer Admin' portlet, and select 'Install Portlets' from the menu.

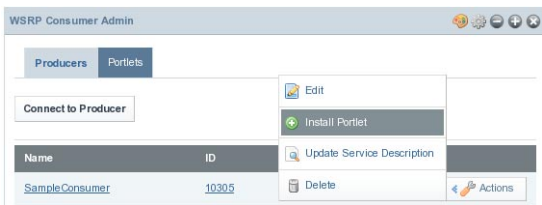


FIGURE 5–10 To create a WSRP Consumer

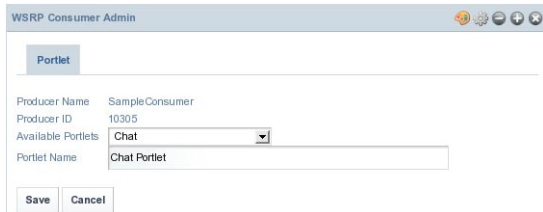
The *Available Portlets* list displays all the portlets available with the Producer. Select a portlet from the Available Portlets list, and Specify a name for the portlet.



---

**Note** – Make sure to specify a name for the portlet. If you are not specifying a name, no name is displayed for the portlet, and it will be difficult to identify the portlet.

---



The screenshot shows the 'WSRP Consumer Admin' window with a 'Portlet' tab selected. The form contains the following fields:

- Producer Name: SampleConsumer
- Producer ID: 10305
- Available Portlets: A dropdown menu with 'Chat' selected.
- Portlet Name: A text input field containing 'Chat Portlet'.

At the bottom of the form are 'Save' and 'Cancel' buttons.

**FIGURE 5–11** To create a WSRP Consumer

- 2 Click Save.**
- 3 Click on the Portlets tab to view the portlet.**



# System Maintenance

---

To be done.

- “Database Administration” on page 139
- “Backups and Restores” on page 139
- “Monitoring and Logging” on page 140

## Database Administration

Add content

### WebSynergy Database Tables

To be done.

## Backups and Restores

Add content

- “Backing Up the System” on page 139
- “Restoring From Backup” on page 139

### Backing Up the System

To be done.

### Restoring From Backup

To be done.

# Monitoring and Logging

To be done.

# Performance Tuning

---

To be done.

- “Database” on page 141
- “Application Server” on page 141
- “Clustering” on page 141
- “Memory” on page 142
- “Properties File” on page 142
- “Servlet Filters” on page 142
- “Portlets” on page 142
- “Java Environment” on page 142
- “Portal Extensions” on page 142

## Database

To be done.

## Application Server

To be done.

## Clustering

To be done.

## Memory

To be done.

## Properties File

To be done.

## Servelet Filters

To be done.

## Portlets

To be done.

## Java Environment

To be done.

## Portal Extensions

To be done.

# Advanced Customization

---

To be done.

- “Creating Custom Portal Bundles” on page 143
- “Implementing Services” on page 143

## Creating Custom Portal Bundles

To be done.

## Implementing Services

To be done.





# Troubleshooting

---

To be done.

## Troubleshooting Tips

The following are some useful tips:

- Before you install Project WebSynergy, make sure that the port: 8080 on your machine is free.

## Troubleshooting FAQs

Which are the databases supported by Project WebSynergy?

HSQL, MYSQL, Microsoft SQL, and Oracle 10g.

What is the recommended JDK version for installing Project WebSynergy?

It should be JDK 1.6.0\_07 and above. Also make sure that ant 1.7.0 is installed on the machine on which you are installing Project WebSynergy.

What will I do if the *Compose* link is not working in *Mail* portlet?

Click the compose window twice to go to the compose window.

Is there any restriction on image size for changing the logo?

You need to choose a very small image. The image for logo is expected to occupy only the header, but a big logo image can occupy the entire page and many links may not work.

What will I do if Facebook, twitter, plaxo and linkedin portlet shows error?

Make sure that your machine is connected to internet or the browser has proxy configured to reach internet.

What is WOL?

WOL stands for World of Liferay. It contains a set of portlets which help in creating your own social networking portlets such as Orkut.

What will I do if my machine is becoming very slow while running Project WebSynergy?  
Make sure that no other heavy applications such as, netbeans or application server are running.

What is BSOJ?  
BSOJ stands for big screen of junk. It happens whenever there is an error or exception while doing some actions on the UI.

What is the recommended memory size to use Project WebSynergy for testing purpose?  
2GB is recommended.

Which browser is best suited for testing Project WebSynergy?  
Firefox 2.x and Firefox 3.x are the most recommended browsers. You may face some UI issues with Internet Explorer.