



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™ 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 CONTREFAÇON.

Contents

1 Administration Overview	7
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
2 Customizing Project WebSynergy	35
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
5 Web Services for Remote Portlets	129
WSRP for Project WebSynergy	129
Adding WSRP Portlets to the Page	129
WSRP Administration	130
6 System Maintenance	139
Database Administration	139
WebSynergy Database Tables	139
Backups and Restores	139
Backing Up the System	139
Restoring From Backup	139
Monitoring and Logging	140
7 Performance Tuning	141
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	Any user account on Project WebSynergy contains a Public Page and a Private Page. The page for the user account which can be accessed by a guest user is called as <i>Public Page</i> . The page which you can access only when you login to the user account is called as <i>Private Page</i> .
Widget	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.
Friendly URLs	The modifiable part of the url for the private page of an user account.
Theme	A look and feel setting which can be applied to a page.
Layout Template	A display scheme which can be applied to the portal.
Guest	A user without a WebSynergy account.
User	A user with a WebSynergy account.
User Group	Arbitrary groupings of users.
Communities	Collections of users who have a common interest.
Organizations	Organizations are hierarchical collections of Users. They are one of the two types of portal resources that can have pages.
User Roles	Regular, Community, and Organization
Delegation Roles	Guest, Power User, User, and Administrator

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.

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

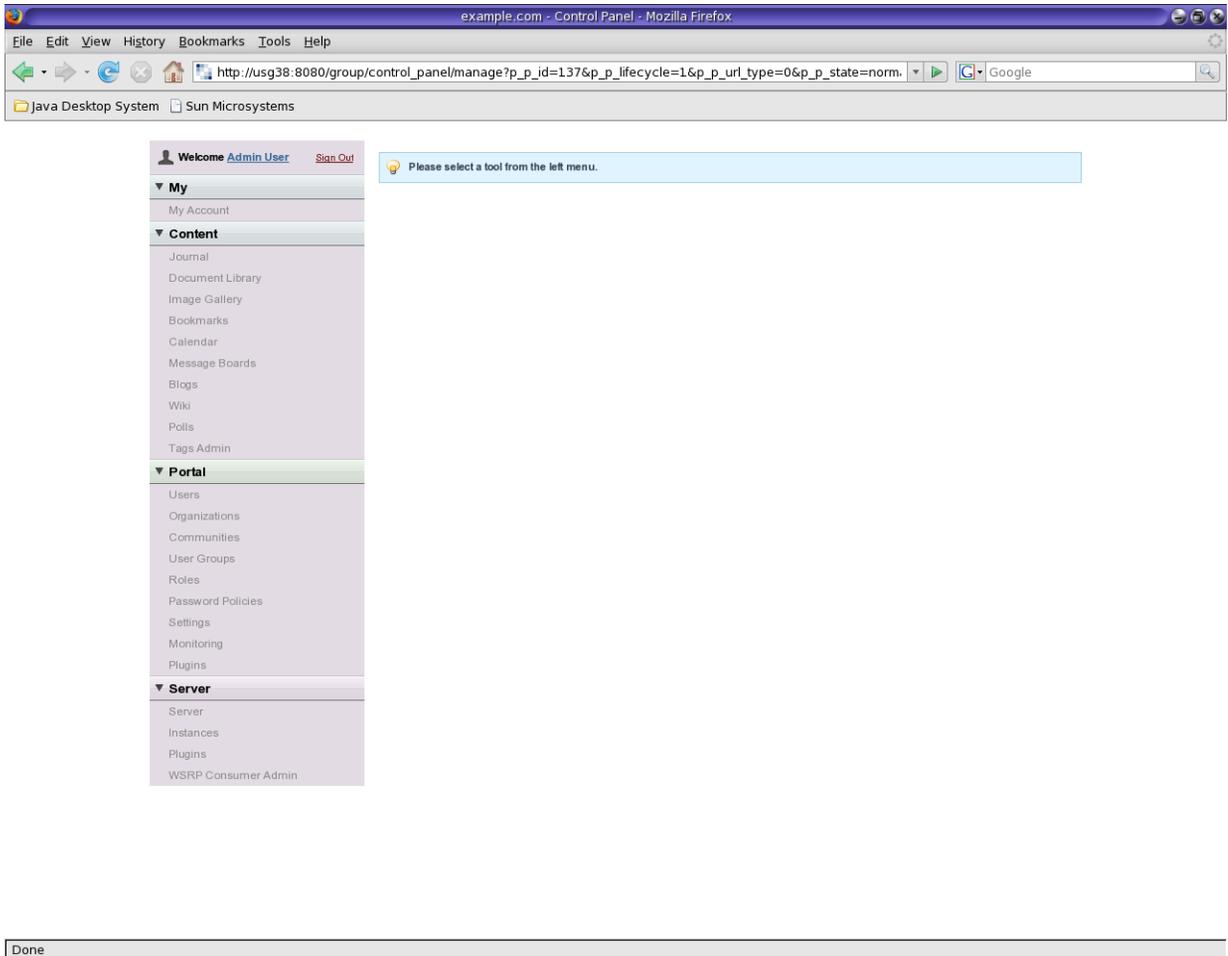


FIGURE 1-1 Control Panel

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

The screenshot shows a web browser window displaying the Liferay Portal Control Panel. The browser's address bar shows the URL: `http://usg38:8080/group/control_panel/manage?p_p_id=137&p_p_lifecycle=0&p_p_url_type=0&p_p_state=maxir`. The page title is "Server".

On the left, there is a navigation menu with sections: "Welcome Admin User" (with a "Sign Out" link), "My" (with "My Account"), "Content" (with links to Journal, Document Library, Image Gallery, Bookmarks, Calendar, Message Boards, Blogs, Wiki, Polls, Tags Admin), "Portal" (with links to Users, Organizations, Communities, User Groups, Roles, Password Policies, Settings, Monitoring, Plugins), and "Server" (with links to Server, Instances, Plugins, WSRP Consumer Admin).

The main content area is titled "Server" and includes a "Return to Full Page" link. It displays the following information:

- Liferay Portal 5.2.0 (Augustine / Build 5200 / October 16, 2008)
- Uptime: 2 Days, 00:16:43

Below this information are several tabs: "Resources", "Log Levels", "System Properties", "Portal Properties", "Shutdown", and "OpenOffice". The "Resources" tab is active and shows two gauges:

- Free Memory / Total Memory:** A gauge showing 16% free memory.
- Free Memory / Maximum Memory:** A gauge showing 45% free memory.

Below the gauges, the following memory statistics are listed:

- Free Memory: 241,301,488 Bytes
- Total Memory: 531,628,032 Bytes
- Maximum Memory: 531,628,032 Bytes

An "Actions" section is located below the memory statistics, listing several maintenance tasks with an "Execute" button for each:

- Run the garbage collector to free up memory.
- Clear content cached by this VM.
- Clear content cached across the cluster.
- Clear the database cache.
- Reindex all search indexes.
- Generate thread dump.

At the bottom of the browser window, the text "Done" is visible.

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.

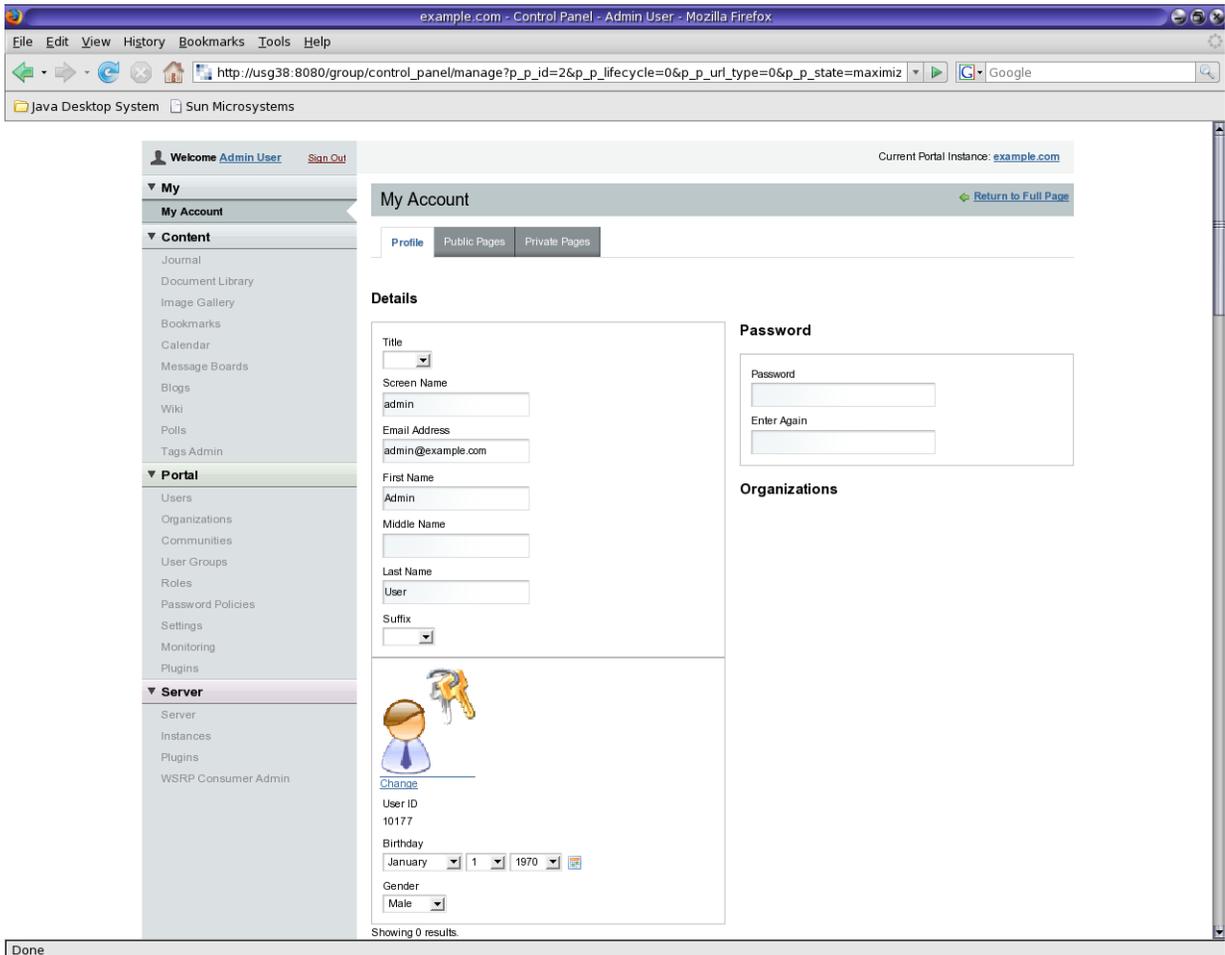


FIGURE 1-3 My Account

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.

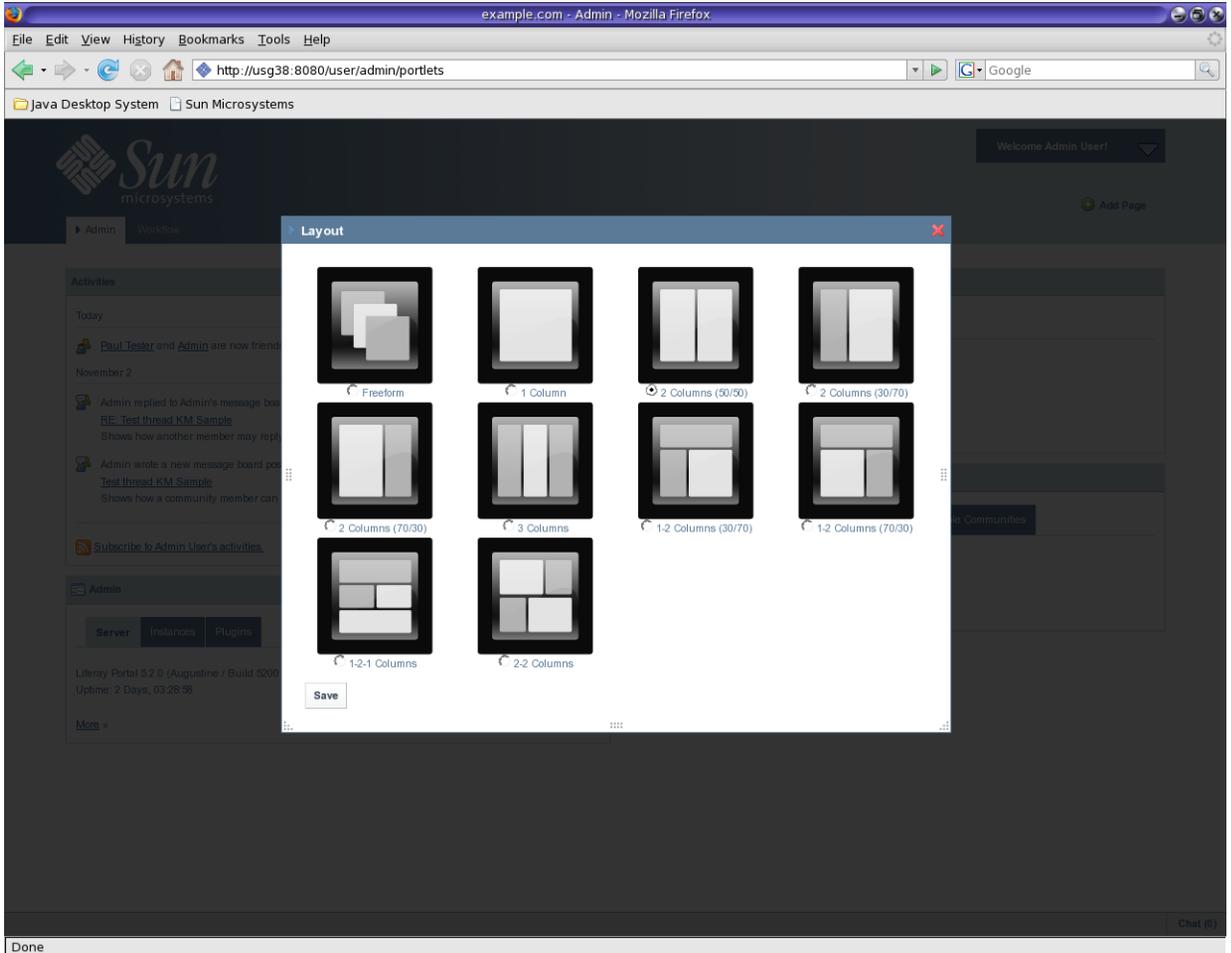


FIGURE 1-4 Layout Template

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.

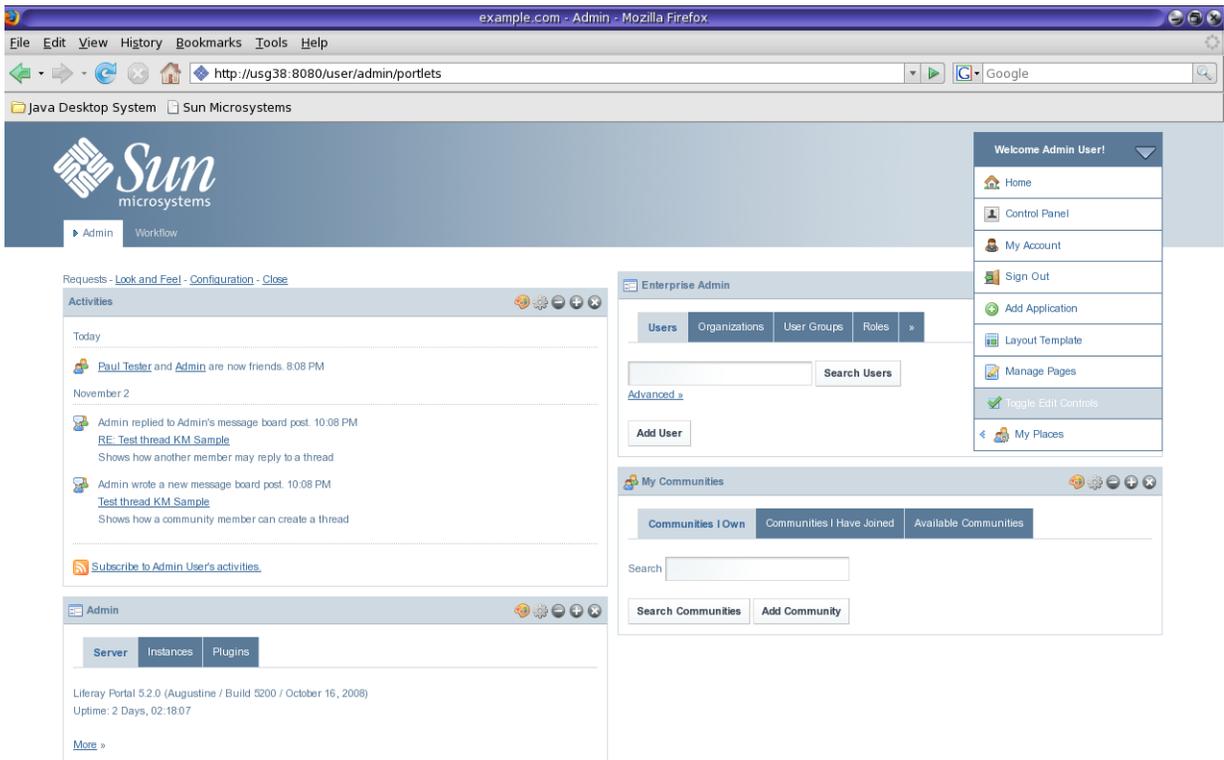


FIGURE 1-5 Toggle Edit Controls

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

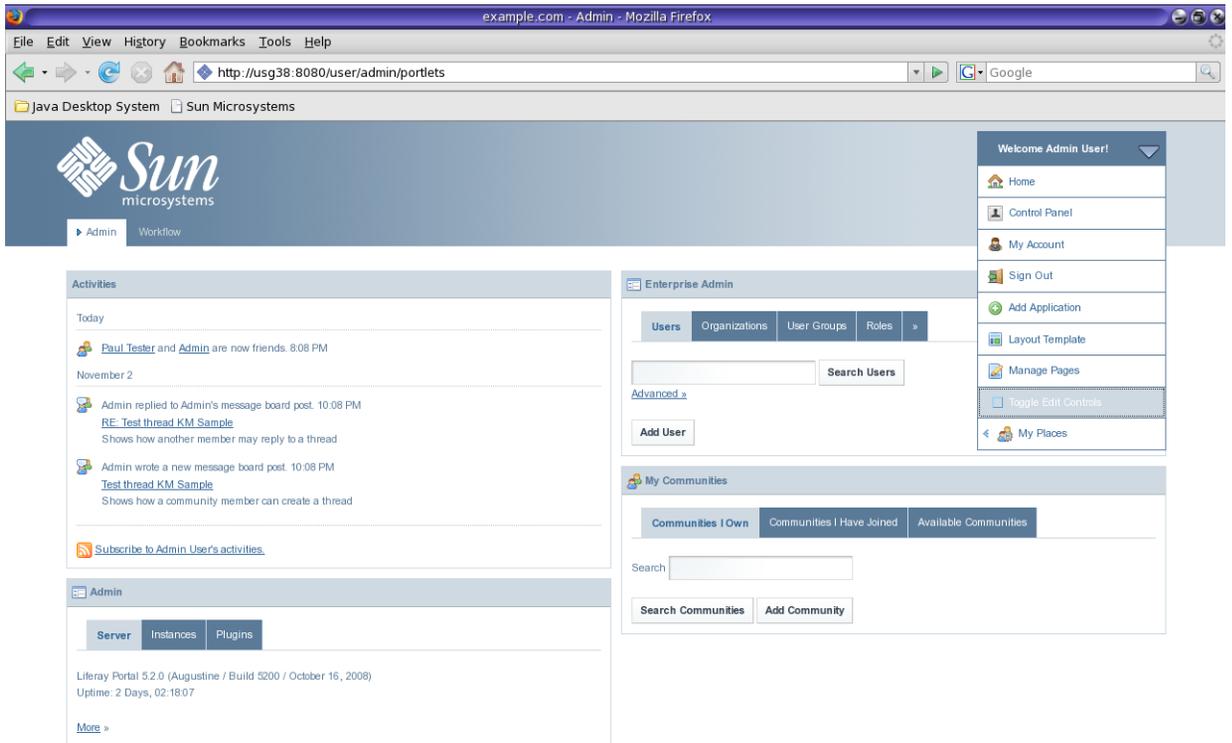


FIGURE 1-6 Toggle Edit Controls

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.

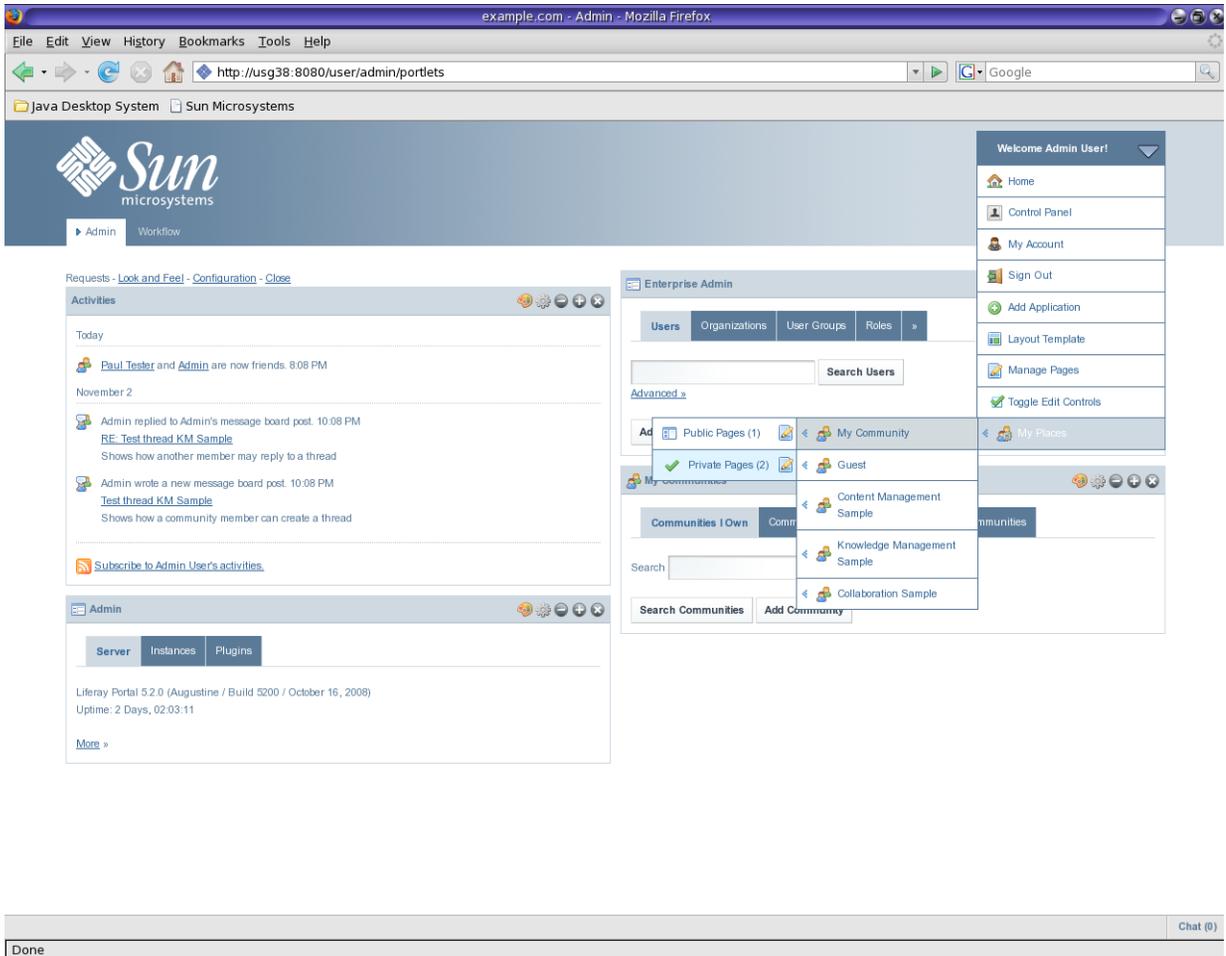


FIGURE 1-7 My Places menu

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.

example.com - Welcome - Mozilla Firefox

Sun
microsystems

Welcome!

Welcome

Sample Users

Mary Manager
Mary has control over the staging and layout of all samples as well as publishing rights for workflow and content management samples.
[View mary's public page](#)
[Express login as mary](#)

Ed Developer
Ed has rights to create structures and templates for the content management sample
[View ed's public page](#)
[Express login as ed](#)

Chris Editor
Chris has article submission rights for the content management sample.
[View chris's public page](#)
[Express login as chris](#)

Paul Tester
Paul is a user with minimum rights within the portal.
[View paul's public page](#)
[Express login as paul](#)

Admin User
Admin has full control over the entire portal, allowing modification and creation of users, communities, and roles.
[View admin's public page](#)
[Express login as admin](#)

WebSynergy Information

Welcome to Project WebSynergy
Your Next Generation Aggregation And Presentation Platform

Social Networking For The Enterprise
Find people with the answers across organizations, silos and hierarchies. Boost productivity in distributed teams.

Enterprise Widgets For Collaboration Work
Productivity Widget Suites
To Get work done (CMS, Workflow)
Information Widget Suite for Effective Collaboration (blogs, wikis)

Internet Widgets On The Enterprise Extranet
Build stickiness into your intranet. (Google Gadgets, YouTube, Facebook)

With Project WebSynergy, possibilities are limitless.
This powerful yet simple Web 2.0 aggregation and presentation platform enables the creation and management of internet and intranet web sites for the Enterprise.
Ajax, Jmaki, Ruby, PHP and/or Java - combine technologies/techniques that you are already know with powerful presentation capabilities to deliver a rich, dynamic, and interactive user experience that has traditionally been reserved for complex custom built web applications.

http://localhost:8080/c/my_places/view?groupId=10180&privateLayout=0

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.

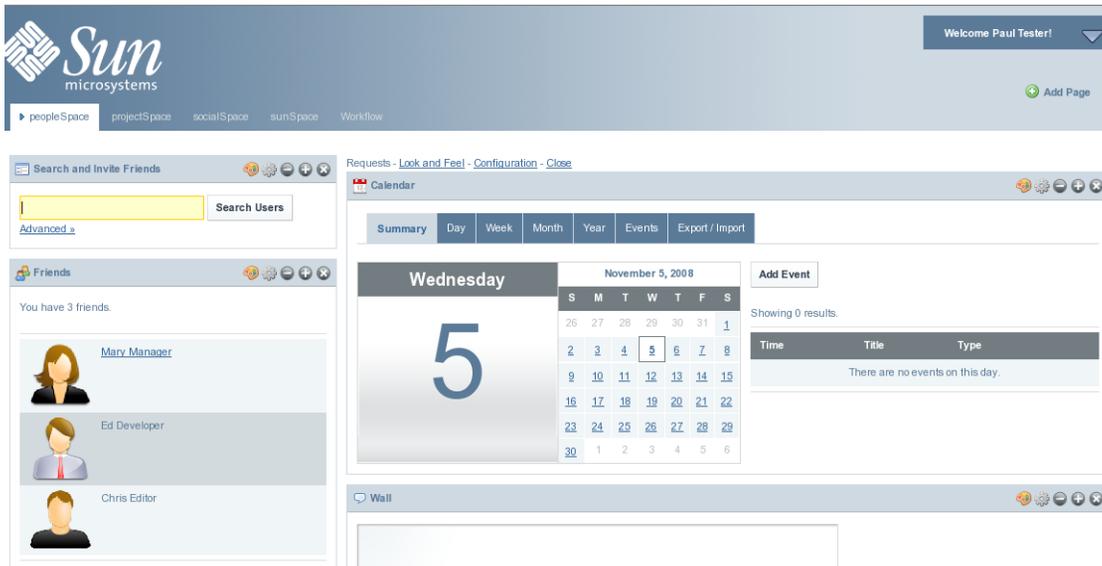


FIGURE 1-9 To Add a Friend

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 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	Add as Friend
Chris	Editor	chris	Editor	
Ed	Developer	ed	Developer	
Jon	Smith	jon	Sales Representative	Add as Friend
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.

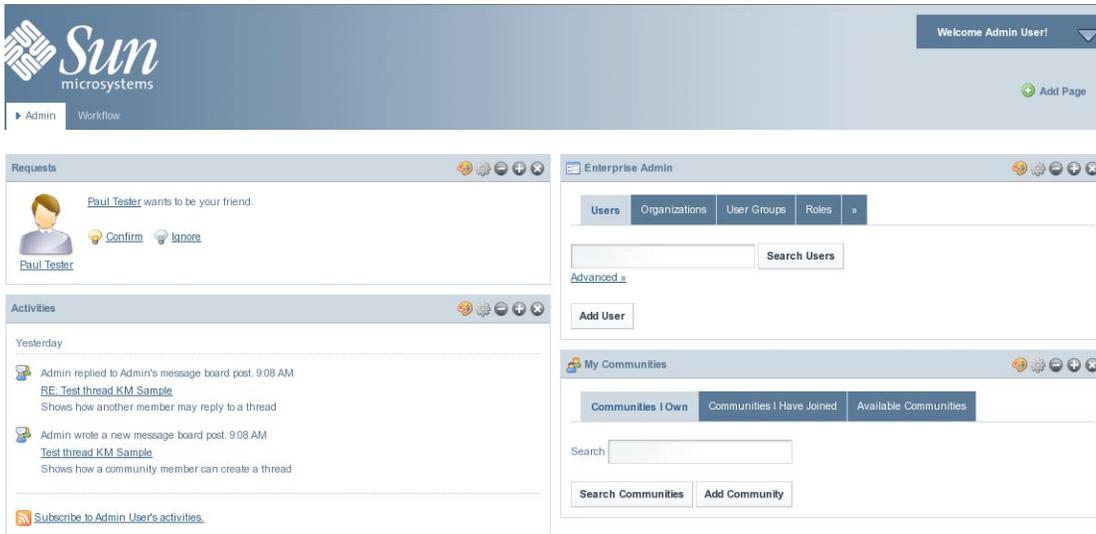


FIGURE 1-11 To Add a Friend

7 Click on the Confirm link.

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

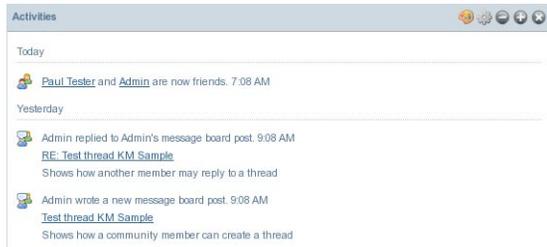


FIGURE 1-12 To Add a Friend

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

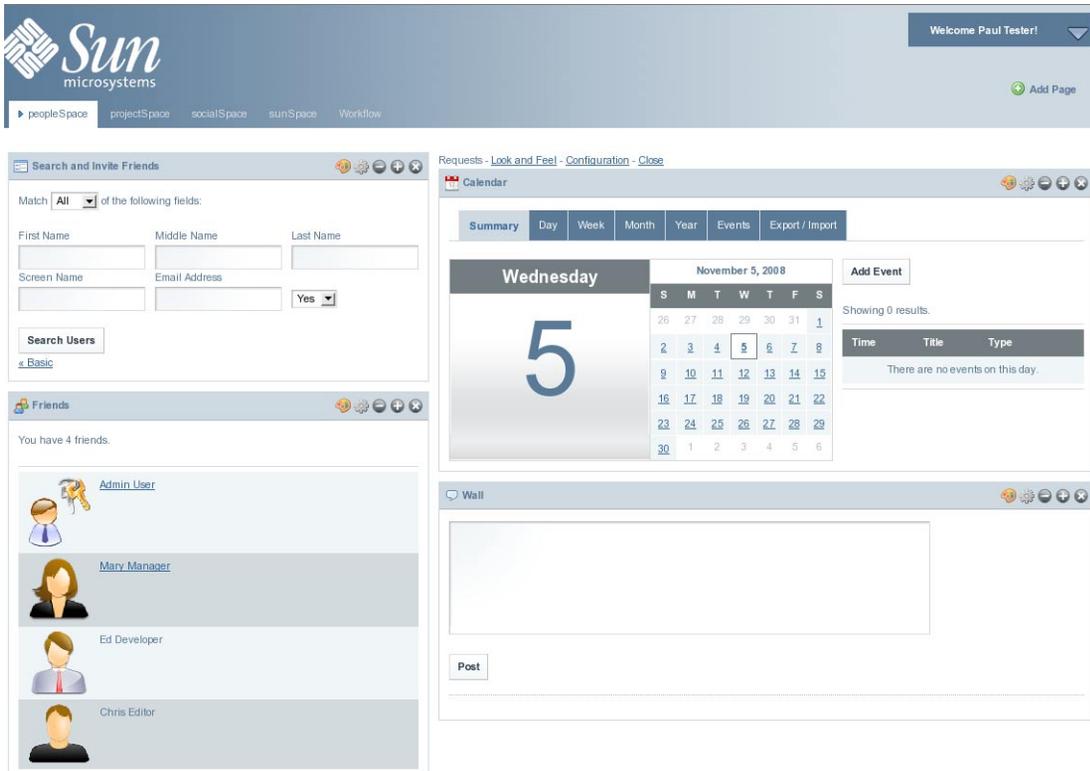


FIGURE 1-13 To Add a Friend

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
100000	My business trip to Santa Clara	10-6-2008	8800.0	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

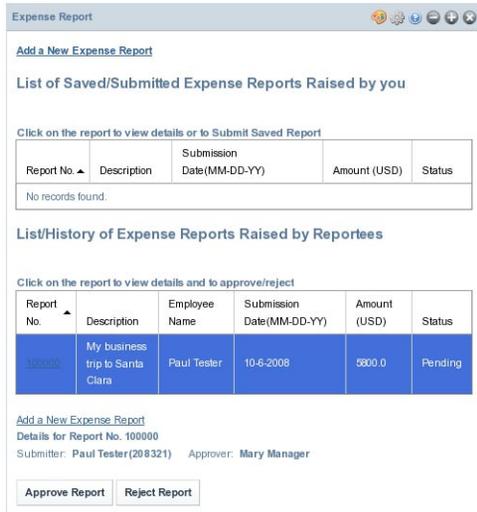
Click on the report to view details and to approve/reject

Report No. ▲	Description	Employee Name	Submission Date (MM-DD-YY)	Amount (USD)	Status
100000	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
100000	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

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.

Enterprise Admin Return to Full Page

✓ Your request processed successfully.

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

Search

Search Roles Add Role

Showing 15 results.

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

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.

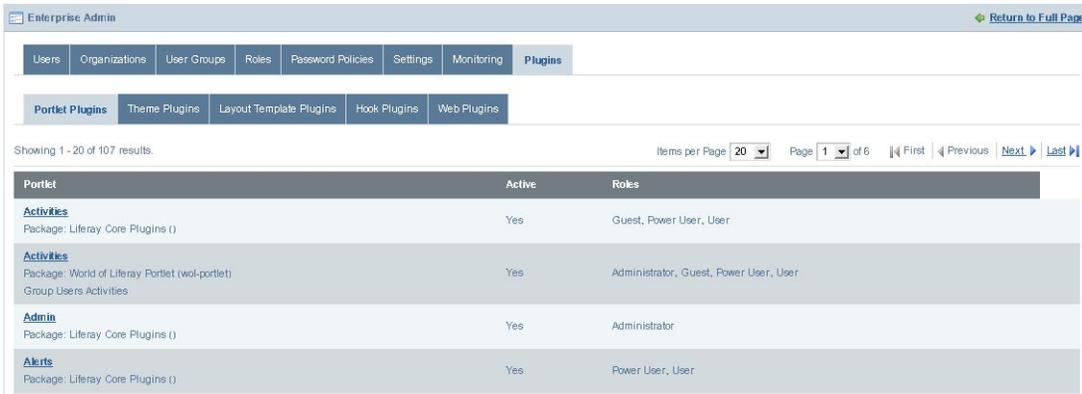


FIGURE 1–22 To Create a new Role

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.

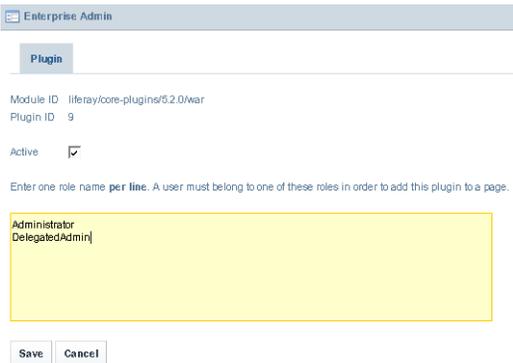


FIGURE 1–23 To Create a new Role

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
Activities Package: Liferay Core Plugins ()	Yes	Guest, Power User, User
Activities Package: World of Liferay Portlet (woi-portlet) Group Users Activities	Yes	Administrator, Guest, Power User, User
Admin Package: Liferay Core Plugins ()	Yes	Administrator, DelegatedAdmin
Alerts 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.

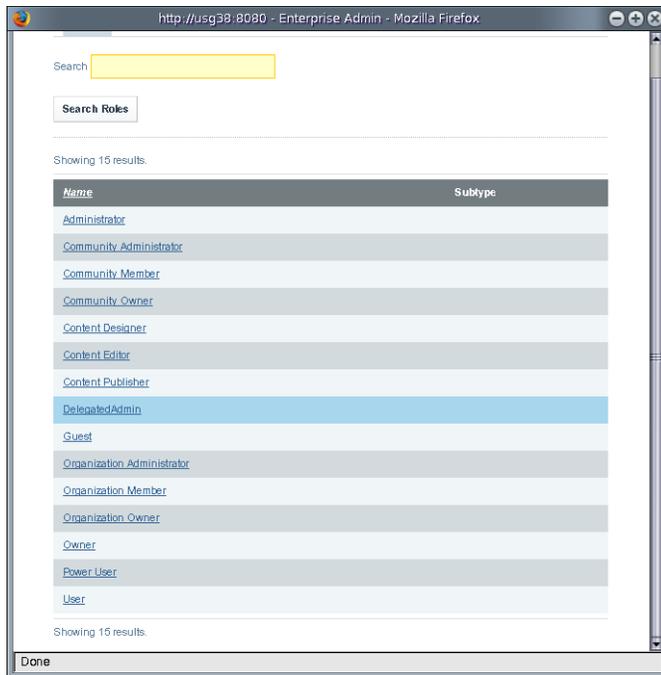


FIGURE 1–25 To Assign a new Role to a User

- 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 form Mary Manager by clicking on Chat. You can reply to the message from Mary Manager.

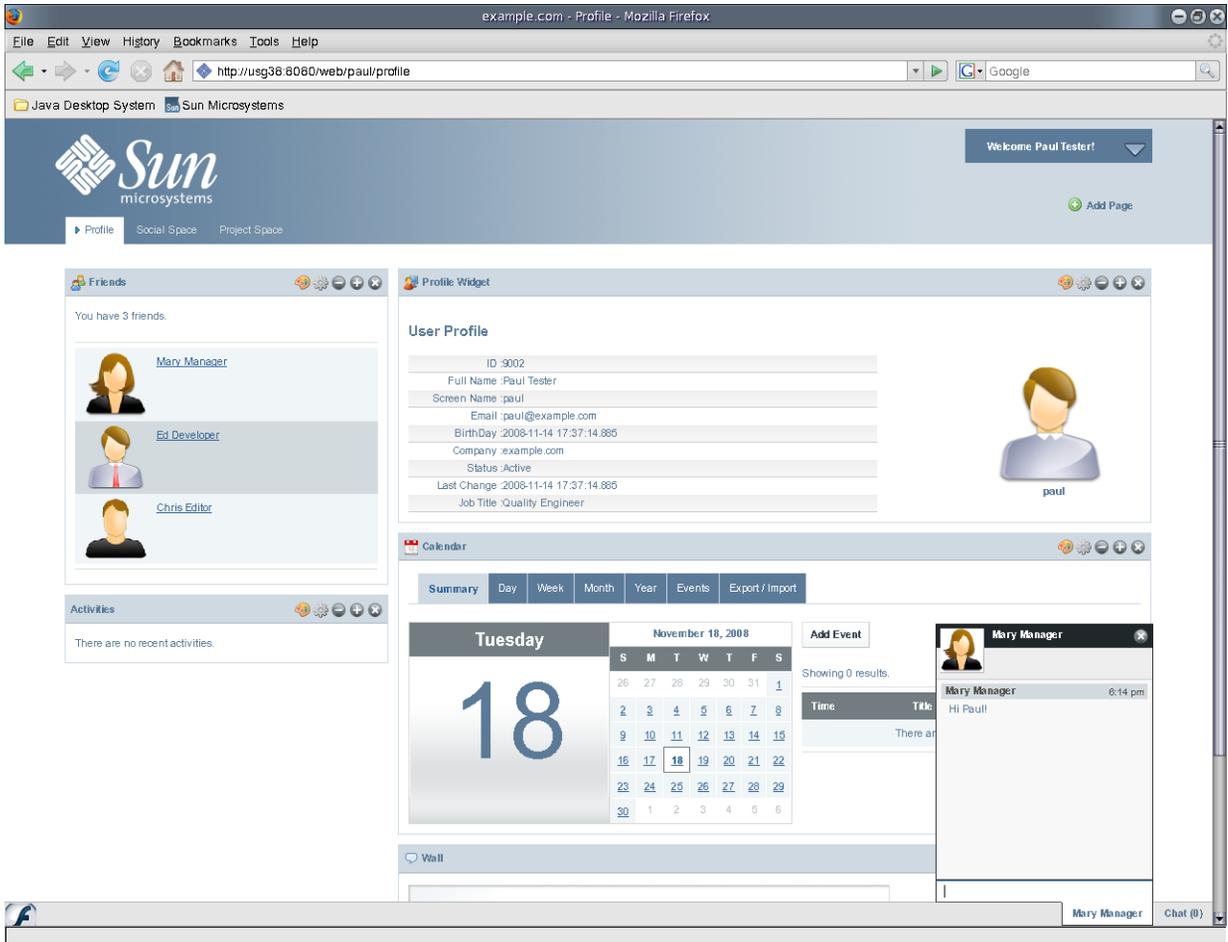


FIGURE 1-26 Chat feature

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

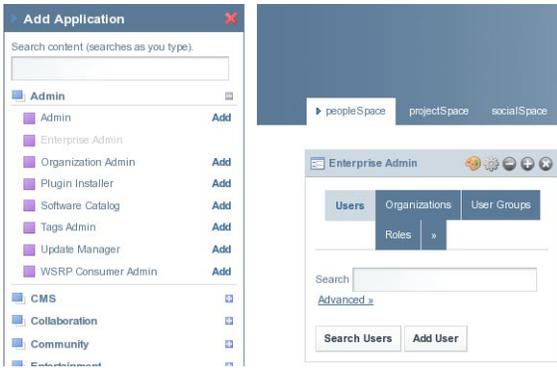


FIGURE 2-1 Enterprise Admin portlet

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

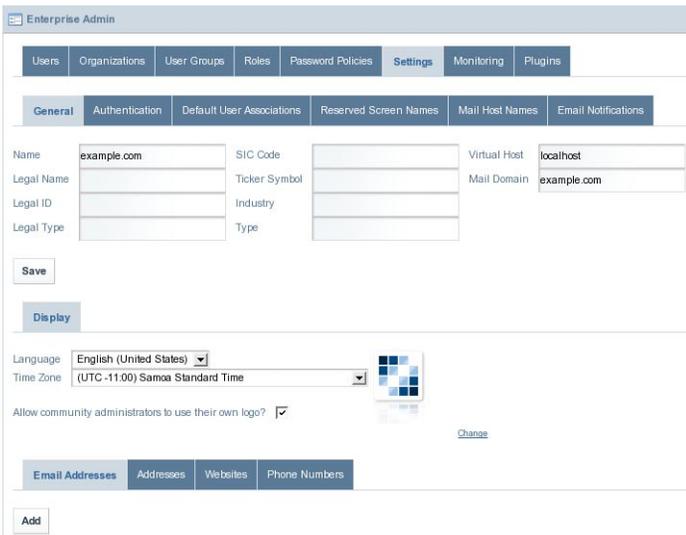


FIGURE 2-2 Settings page

- 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.

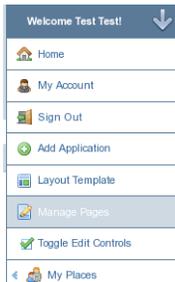


FIGURE 2-3 Welcome menu – Manage Pages

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

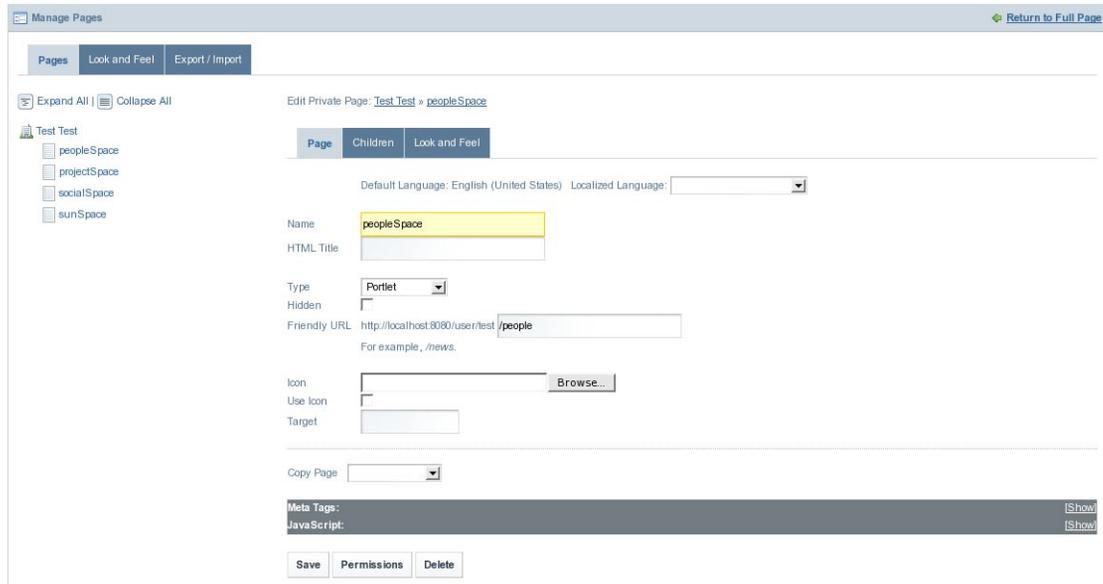


FIGURE 2-4 Manage Pages page

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.

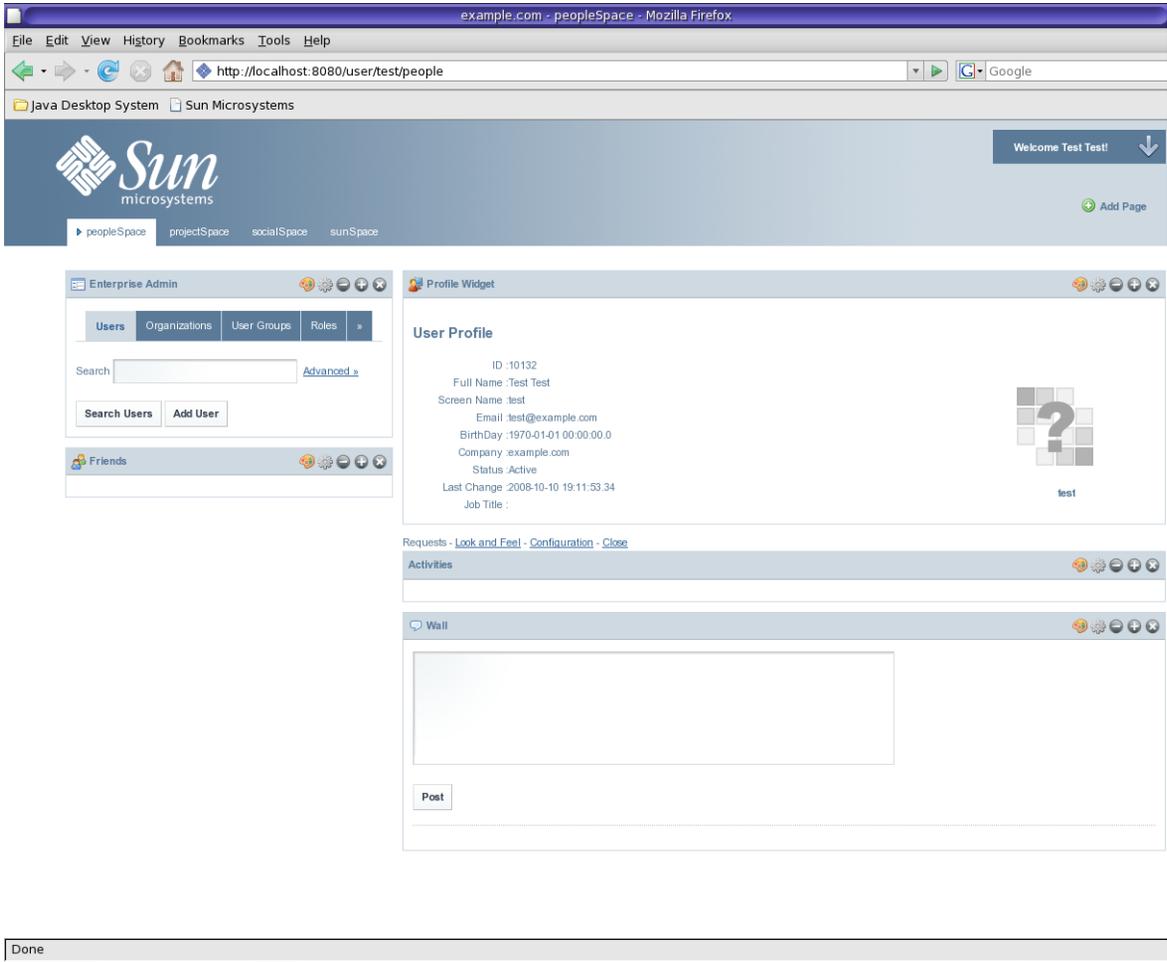


FIGURE 2-5 Friendly URL for the page

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*.

Friendly URL `http://localhost:8080/user/test/friendly_url`
 For example, `/news`.

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`.

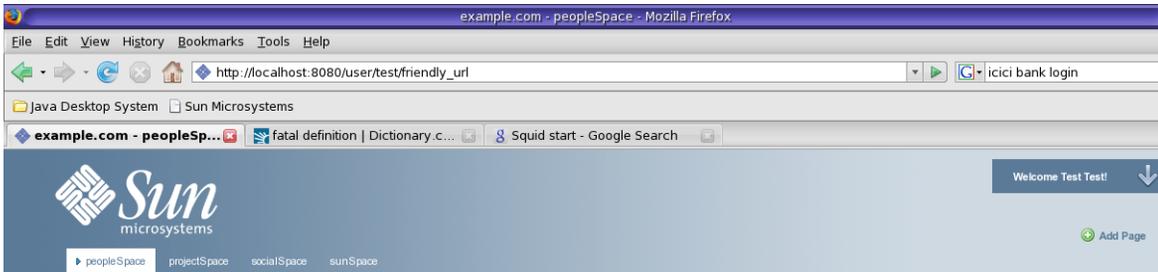


FIGURE 2-8 New Friendly URL

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.

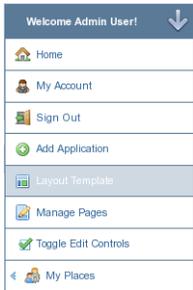


FIGURE 2-9 Welcome menu – Layout Template

3 The Layout page appears.

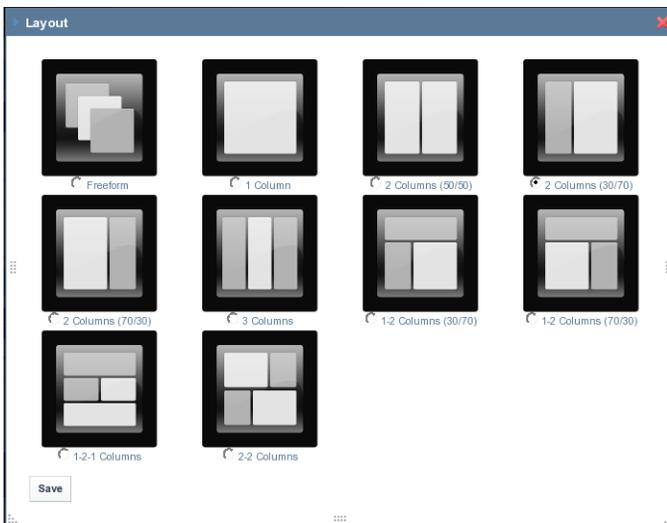


FIGURE 2-10 Layout Templates

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.

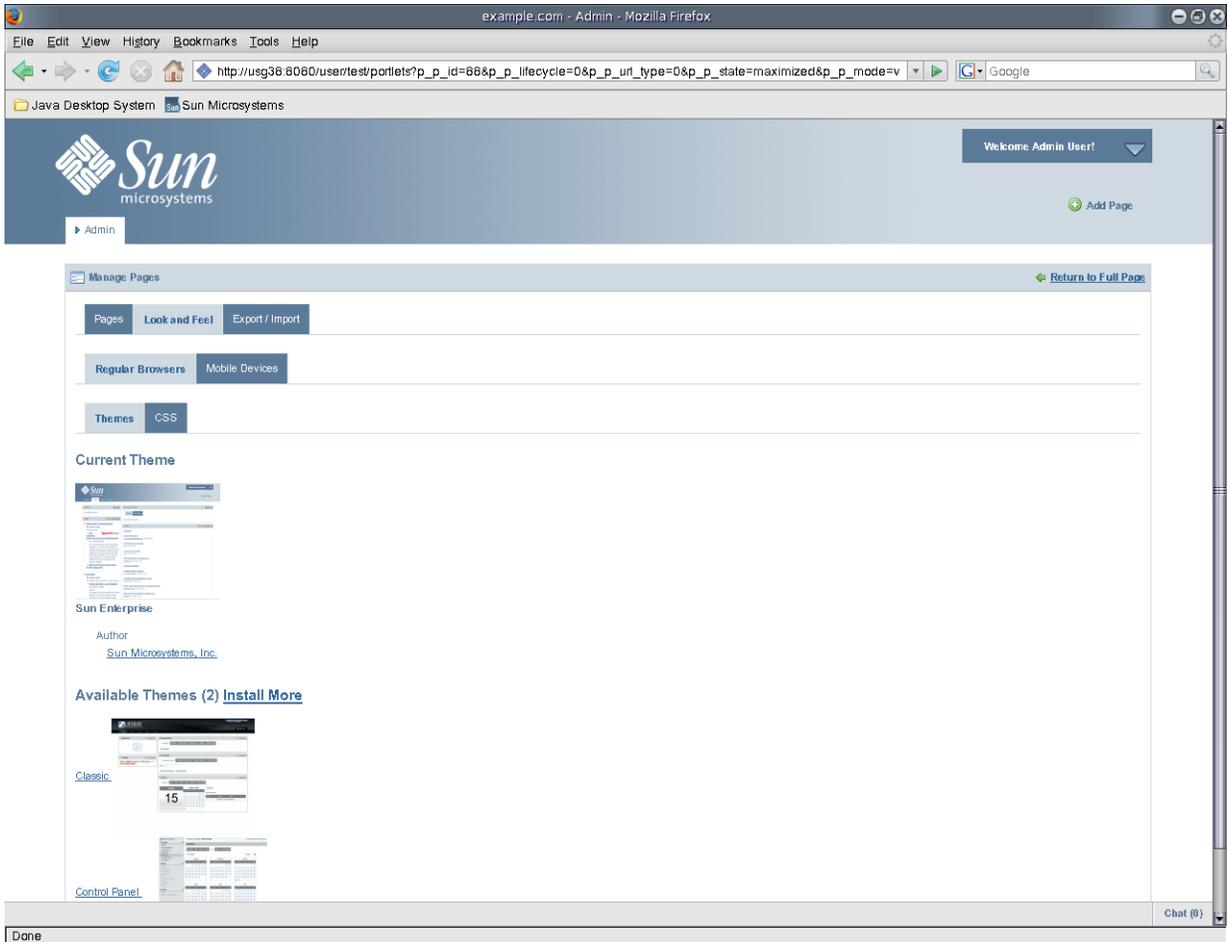


FIGURE 2-11 Page Theme

- 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.

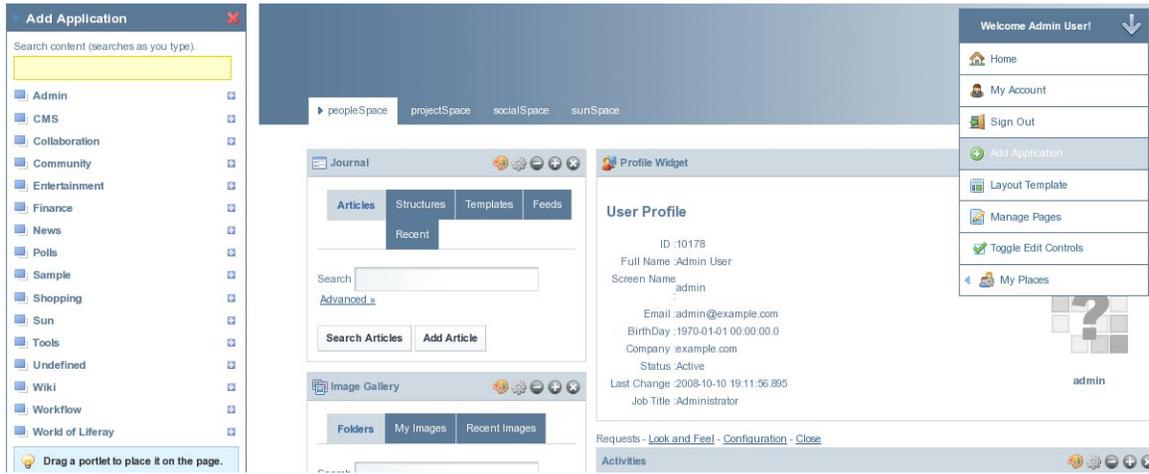


FIGURE 2-12 Bundled WebSynergy Portlets

- 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.

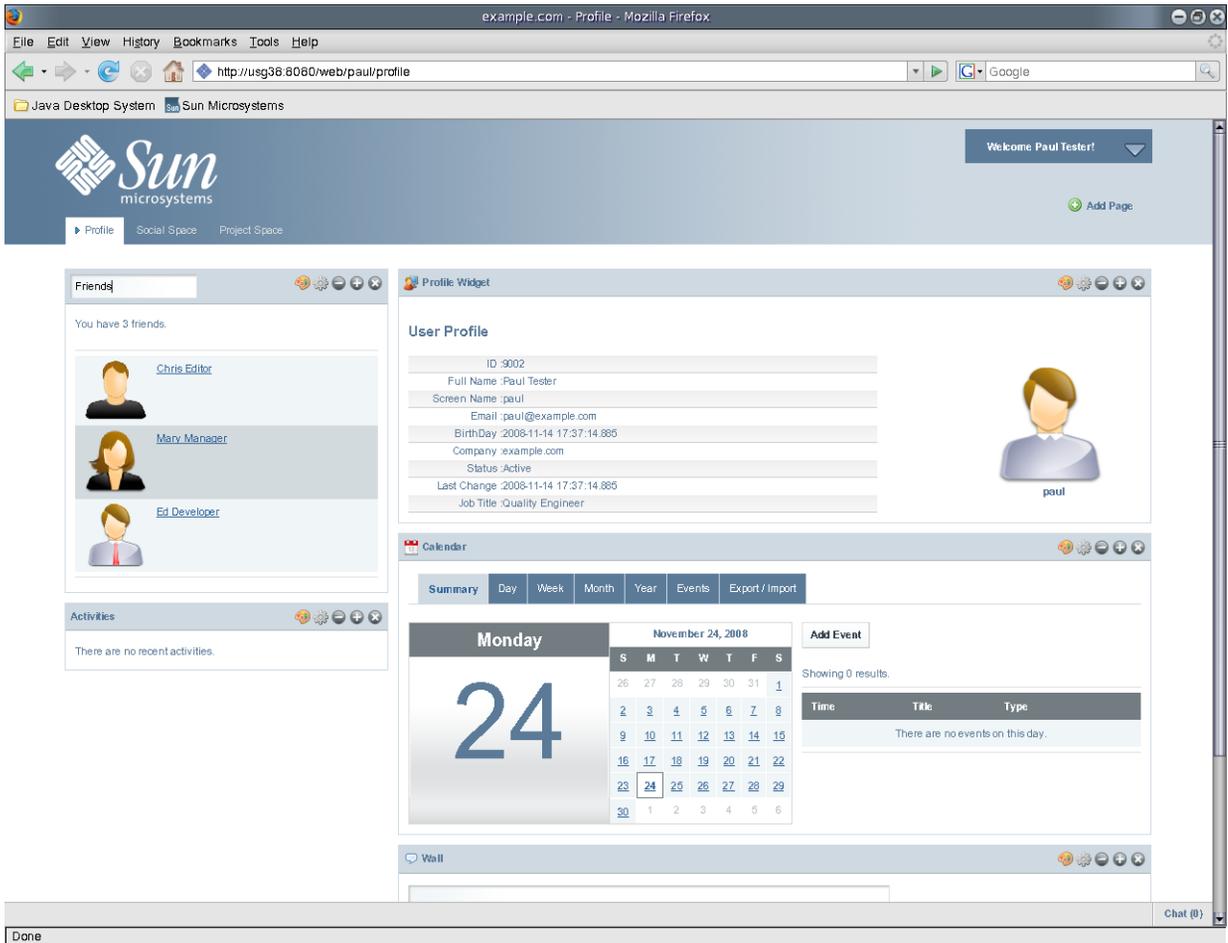


FIGURE 2-13 Changing the display name of a portlet

3 Edit the display name.

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

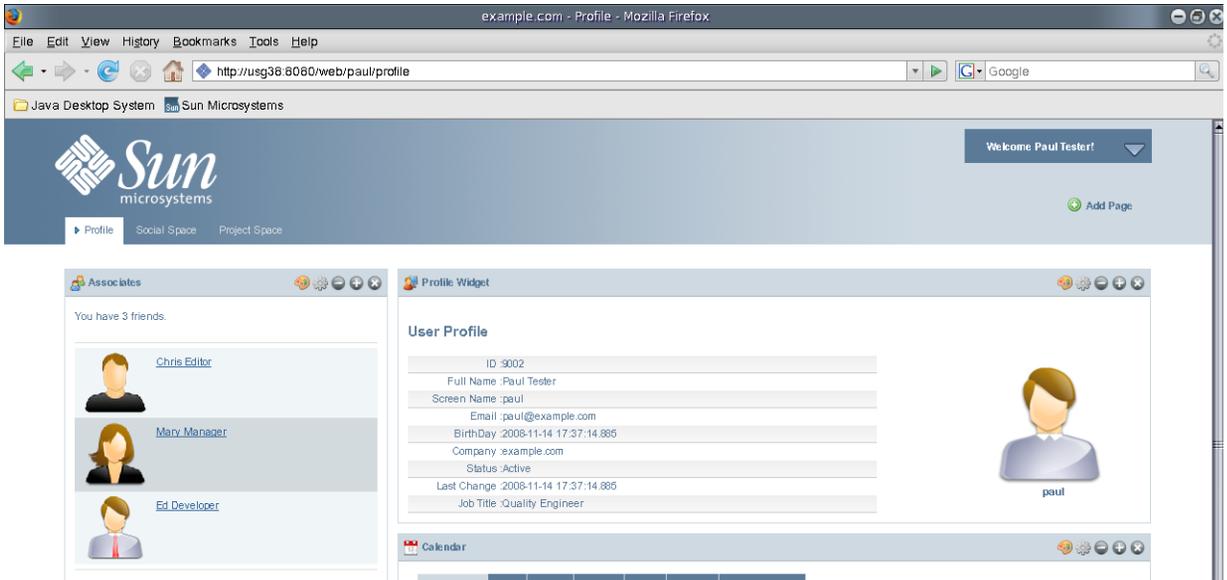


FIGURE 2-14 Changed display name

▼ 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.

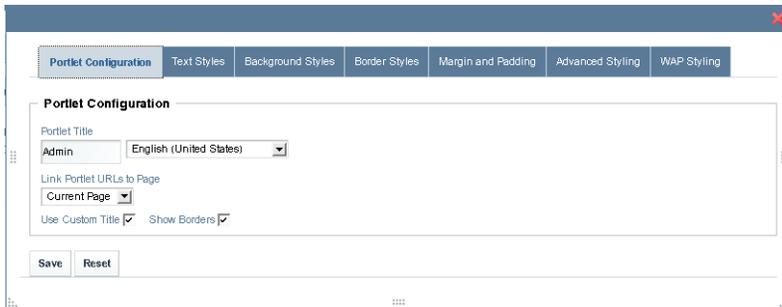


FIGURE 2-16 Customizing the Look and Feel

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.

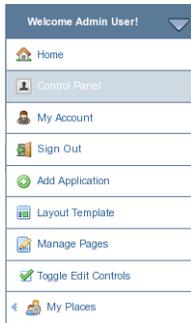


FIGURE 3-1 Welcome menu – Control Panel

The Control Panel page appears.

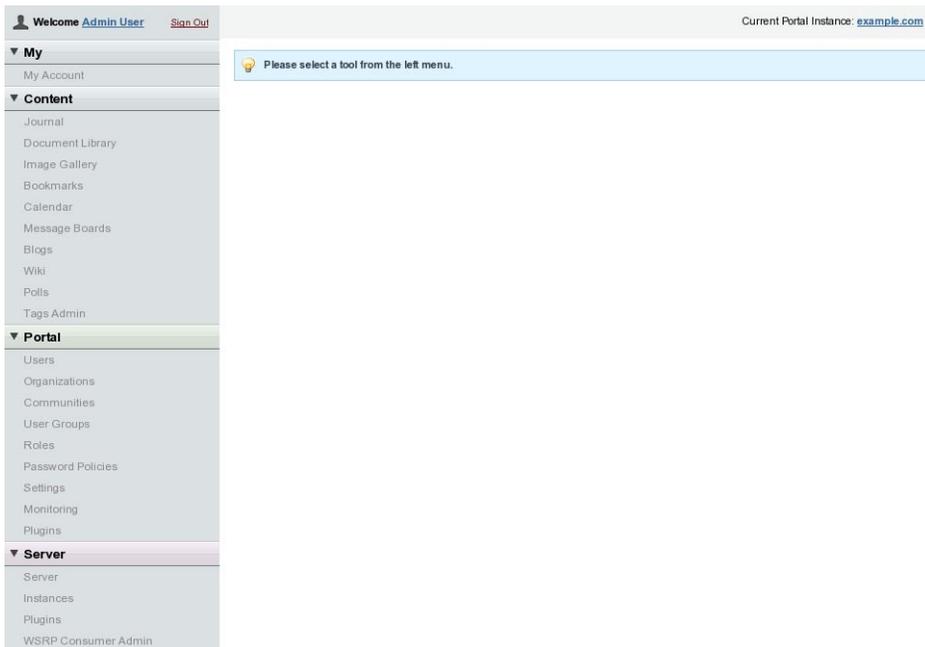


FIGURE 3-2 Control Panel

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*.

The screenshot shows the 'Users' management interface. At the top, there's a search bar and an 'Add User' button. Below that, there are 'Deactivate' and 'Export' buttons. A message indicates 'Showing 7 results.' The main content is a table with the following data:

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

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.

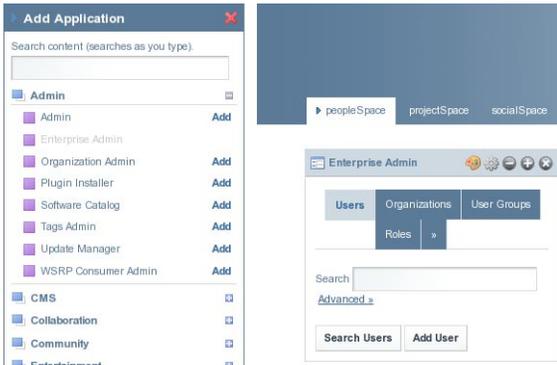


FIGURE 3-4 Adding Enterprise Admin portlet to the portlet page

- 3 Click on User Groups.

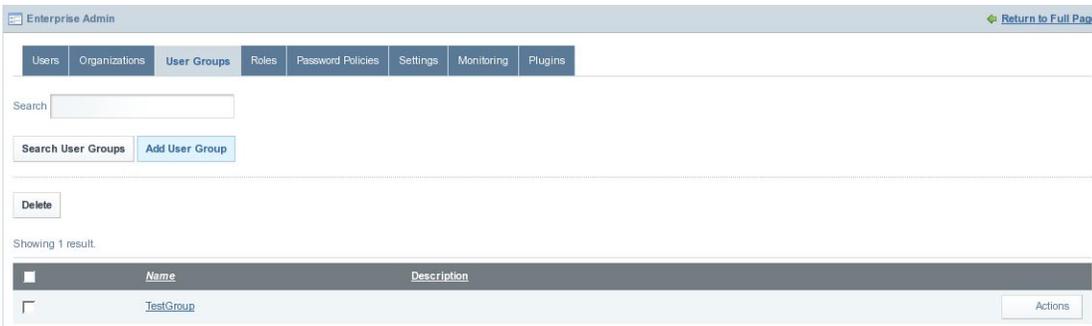


FIGURE 3-5 User Groups

- 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 [Return to Full Page](#)

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

Search

Search User Groups Add User Group

Delete

Showing 2 results.

Name	Description	Actions
<input type="checkbox"/> Admin	A group of admin users	<ul style="list-style-type: none"> Edit Permissions Manage Pages Assign Members View Users Delete Actions
<input type="checkbox"/> TestGroup		<ul style="list-style-type: none"> 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.

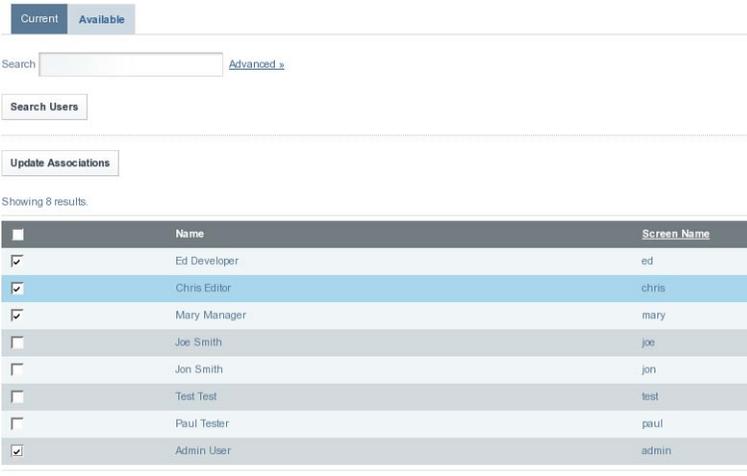


FIGURE 3-9 Available Tab

- 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.

Current Available

Search [Advanced ▾](#)

Showing 4 results.

<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.

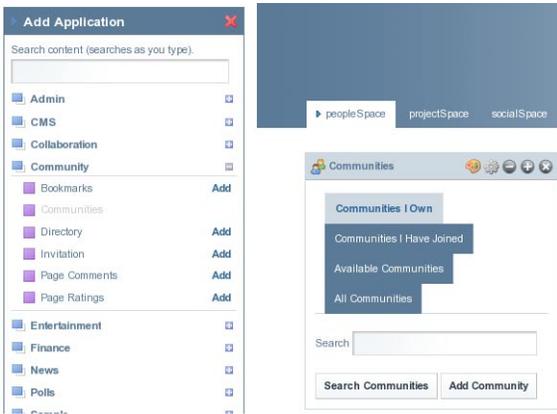


FIGURE 3–11 Adding Communities portlet to the portlet page

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 a list of communities. The 'Admin Community' is selected, and the 'Assign Members' action is highlighted in the context menu.

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. The 'Current' tab is selected, and the 'Admin User' is listed as a community member.

<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.

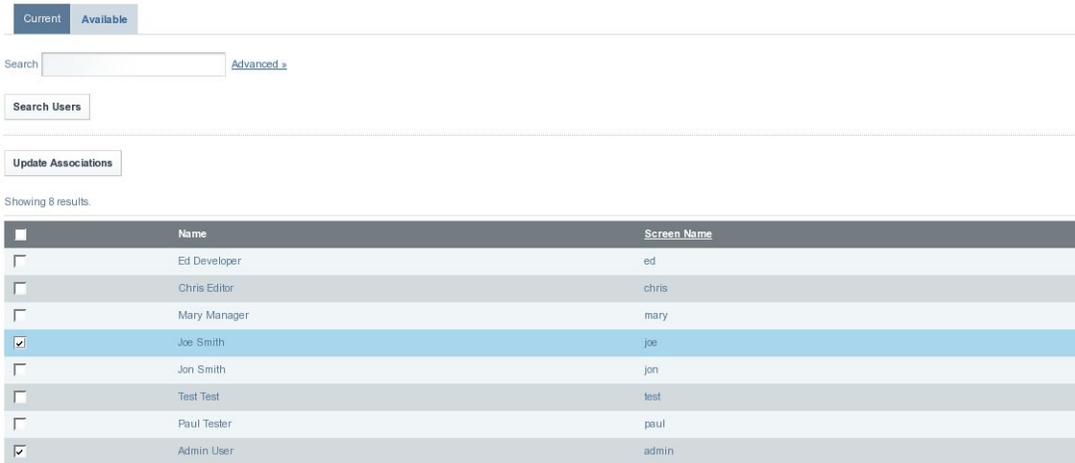


FIGURE 3-15 Available Tab

- 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.

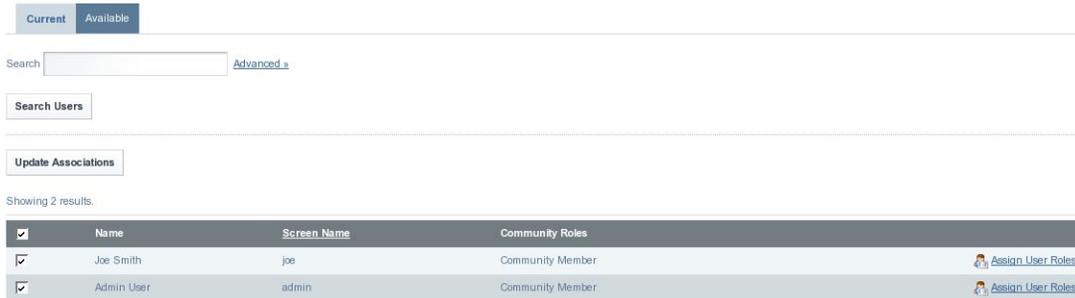


FIGURE 3-16 Current Tab (after assigning members to the Community)

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.

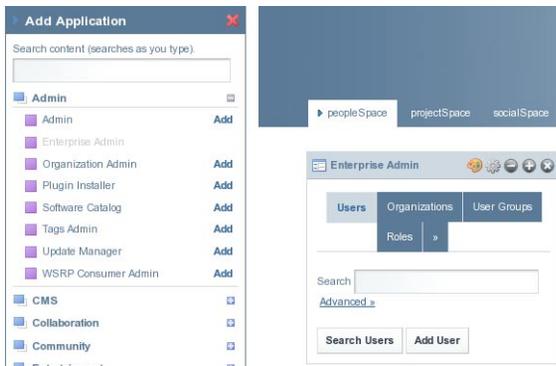


FIGURE 3-17 Adding Enterprise Admin portlet to the portlet page

- 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	Actions
<input type="checkbox"/>	Admin Organization		Regular		Colorado	United States	Actions
<input type="checkbox"/>	Test Location	Test Organization	Location		California	United States	Actions
<input type="checkbox"/>	Test Organization		Regular		California	United States	Actions

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.



Enterprise Admin

Organization

Name: Admin Location Type: Location

Parent Organization: [Select](#) [Remove](#) Country: United States

Region: Louisiana

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

FIGURE 3–22 Creating a Suborganization

- 3 Click **Select** to select the parent organization.

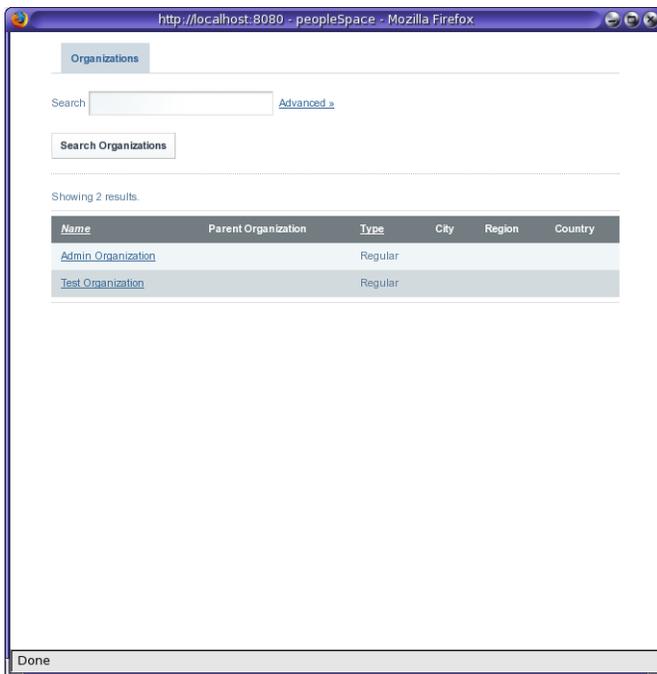


FIGURE 3–23 Selecting a Parent Organization

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.

The screenshot shows the 'Enterprise Admin' interface for creating an organization. The 'Organization' tab is active. The form contains the following fields:

- Name:** Admin Location
- Type:** Location (dropdown menu)
- Parent Organization:** Admin Organization (with 'Select' and 'Remove' buttons)
- Country:** United States (dropdown menu)
- Region:** Louisiana (dropdown menu)

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

FIGURE 3–24 Suborganization with a Parent Organization

5 Click Save.

You can add other attributes such as phone number and address.

The screenshot shows the 'Enterprise Admin' interface after a successful request. A green message box at the top states 'Your request processed successfully.' The 'Organization' tab is active. The form displays the following information:

- Group ID:** 10286
- Name:** Admin Location
- Type:** Location
- Country:** United States
- Region:** Louisiana

 Below the form are 'Save' and 'Cancel' buttons. There are four tabs: 'Email Addresses', 'Addresses', 'Websites', and 'Phone Numbers'. The 'Email Addresses' tab is selected, showing a table with columns 'Address', 'Type', and 'Primary'. The table is empty, with a message: 'The organization does not have any email addresses.' Below the table are tabs for 'Services' and another 'Add' button.

FIGURE 3–25 Organization particulars

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

Enterprise Admin [Return to Full Page](#)

Users Organizations User Groups Roles Password Policies Settings Monitoring Plugins

Search [Advanced »](#)

[Search Organizations](#) [Add Organization](#)

[Delete](#)

Showing 4 results.

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

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.

Enterprise Admin [Return to Full Page](#)

Users Organizations User Groups Roles Password Policies Settings Monitoring Plugins

Search [Advanced »](#)

[Search Organizations](#) [Add Organization](#)

[Delete](#)

Showing 4 results.

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

- Edit
- Permissions
- Manage Pages
- Assign User Roles
- Assign Members
- Add User
- View Users
- Add Suborganization
- View Suborganizations
- Delete

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: [Dropdown] Organizations: Admin Organization [X] Select

First Name: Joe Job Title: Admin

Middle Name: [Empty]

Last Name: Smith

Suffix: [Dropdown]

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: [Input] [Advanced...](#)

Search Organizations

Showing 4 results.

Name	Parent Organization	Type	City	Region	Country
Admin Location	Admin Organization	Location			
Admin Organization		Regular			
Test Location	Test Organization	Location			
Test Organization		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.

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.

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 »](#)

Showing 8 results.

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

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.

The screenshot shows the 'Enterprise Admin' interface. At the top, there is a success message: 'Your request processed successfully.' Below this is a 'User' tab with a 'Back' button. The user details form includes fields for User ID (10240), Screen Name (joe), Email Address (joe.smith@example.com), Birthday (January 1, 1970), Gender (Male), Organizations (Admin Location [x], Admin Organization [x]), Prefix, First Name (Joe), Middle Name, Last Name (Smith), Suffix, and Job Title (Admin). There are 'Save' and 'Cancel' buttons. Below the form are tabs for 'Display', 'Password', 'Regular Roles', 'Community Roles', and 'Organization Roles'. The 'Regular Roles' tab is active, showing an 'Assign Regular Roles' button and a table of roles.

Name	
Power User	Remove
User	Remove

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.

Current Available

Search

Search Roles

Update Associations

Showing 3 results.

<input checked="" type="checkbox"/>	Name	Type	Description
<input checked="" type="checkbox"/>	Administrator	Regular	Administrators are super users who can do anything.
<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 3–36 Regular Roles (Assigned)

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

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

Showing 0 results.

Name	Community
Community Member	Admin Community

FIGURE 3–37 Community Roles

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

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

Showing 0 results.

Name	Organization	
Organization Member	Admin Location	Remove
Organization Member	Admin Organization	Remove

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](#)

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

Portlet Plugins Theme Plugins Layout Template Plugins Web Plugins

Showing 1 - 20 of 90 results. Page 1 of 5 First Previous Next Last

Portlet	Active	Roles
Activities Package: Liferay Core Plugins ()	Yes	Guest, Power User, User
Admin Package: Liferay Core Plugins ()	Yes	Administrator
Alerts Package: Liferay Core Plugins ()	Yes	Power User, User
Amazon Rankings Package: Liferay Core Plugins ()	Yes	Power User, User
Announcements Package: Liferay Core Plugins ()	Yes	Power User, User
Asset Publisher Package: Liferay Core Plugins () Tagged Content	Yes	Guest, Power User, User
Blogs Package: Liferay Core Plugins ()	Yes	Guest, Power User, User
Blogs Aggregator Package: Liferay Core Plugins ()	Yes	Guest, Power User, User
Bookmarks Package: Liferay Core Plugins ()	Yes	Power User, User
Breadcrumb 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.

The screenshot shows the 'Enterprise Admin' interface for configuring a plugin. At the top, there is a 'Plugin' tab. Below it, the following information is displayed: 'Module ID: liferay/core-plugins/5.1.1/war' and 'Plugin ID: 116'. An 'Active' checkbox is checked. Below this, a text input field contains the roles 'Guest', 'Power User', and 'User', with the instruction 'Enter one role name per line. A user must belong to one of these roles in order to add this plugin to a page.' At the bottom, there are 'Save' and 'Cancel' buttons.

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.

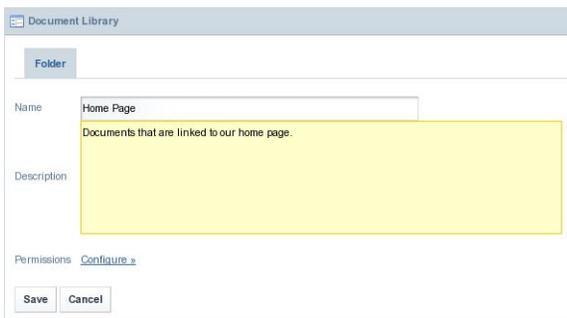


FIGURE 4-2 Creating a document folder

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



FIGURE 4-3 Document folders

- 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

- 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.

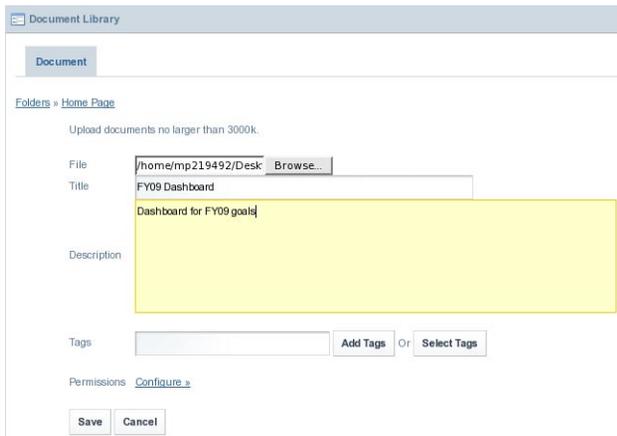


FIGURE 4-8 Uploading documents

9 Click Save when finished.

The article is added to the Document Library.

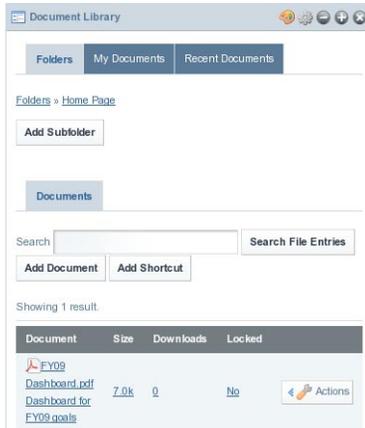


FIGURE 4–9 Uploaded document in the Document Library

▼ 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.

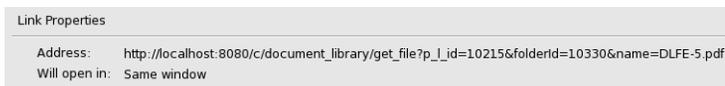


FIGURE 4–10 Link Properties

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*.

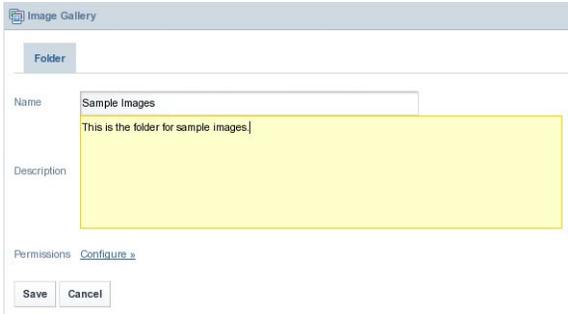


FIGURE 4-13 Adding a folder to the Image Gallery Portlet

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.

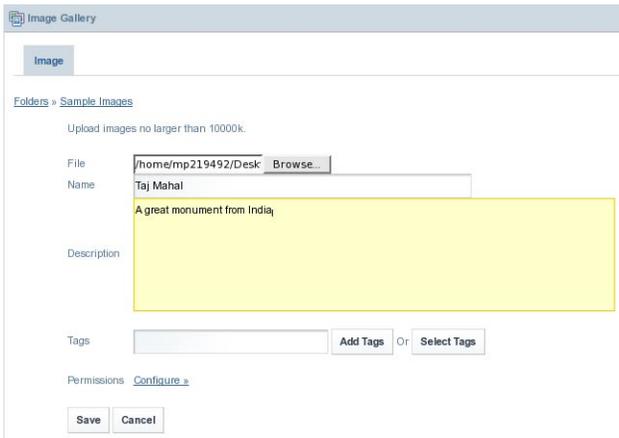


FIGURE 4-19 Uploading an image

The image is added to the image gallery.

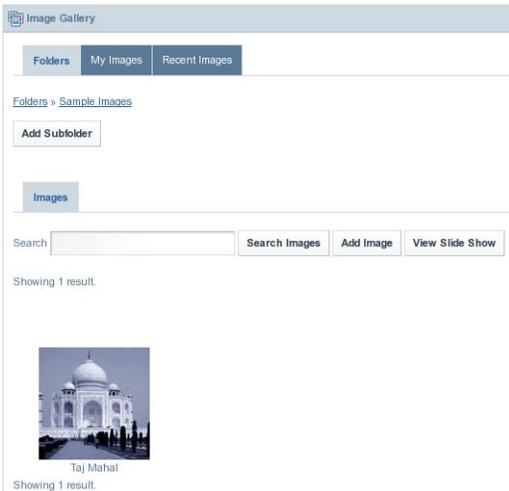


FIGURE 4-20 Image uploaded to the folder

▼ 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:	http://localhost:8080/image/image_gallery?img_id=10444
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.

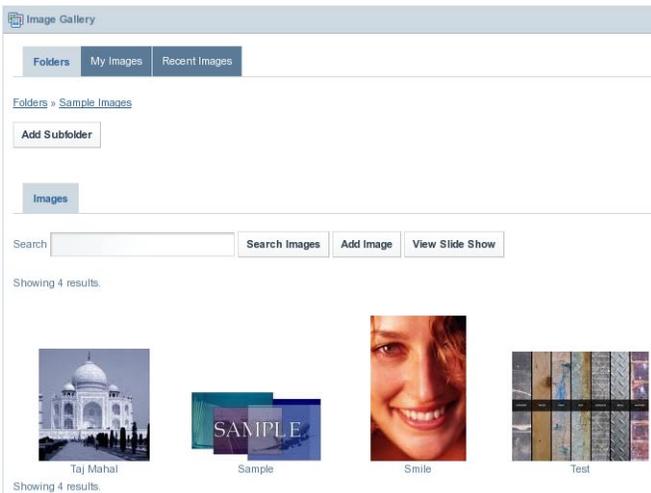


FIGURE 4–23 To view Image Slide Show

- 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.

Previous Play Pause Next Speed 3 ▾



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

Description:

Permissions: [Configure »](#)

Save Save and Continue Cancel

XML Schema Definition

Add Row Launch Editor

title	Text	<input type="checkbox"/>					
size	Text	<input type="checkbox"/>					
url	Text	<input type="checkbox"/>					
description	Text Area (HTML)	<input type="checkbox"/>					

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	Actions
BASIC-WEBCAST	Basic Webcast Basic Webcast	<input type="checkbox"/> Actions

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.

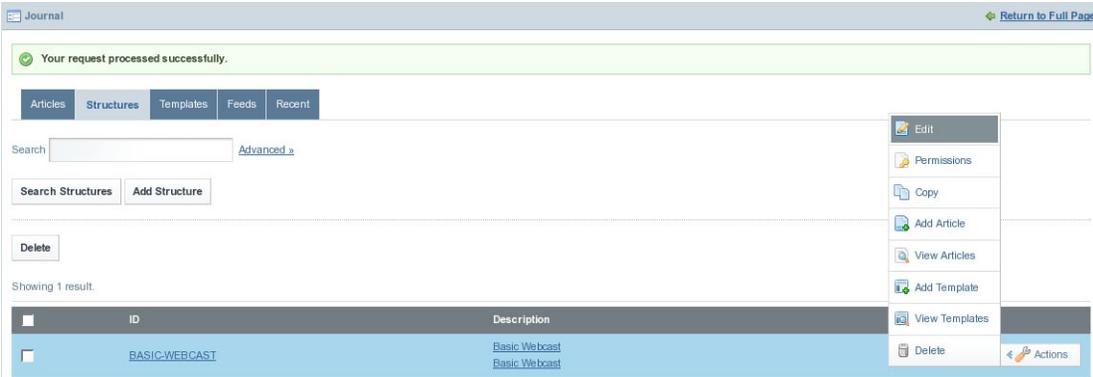


FIGURE 4–29 To edit a Structure

The Structure opens in Edit mode.

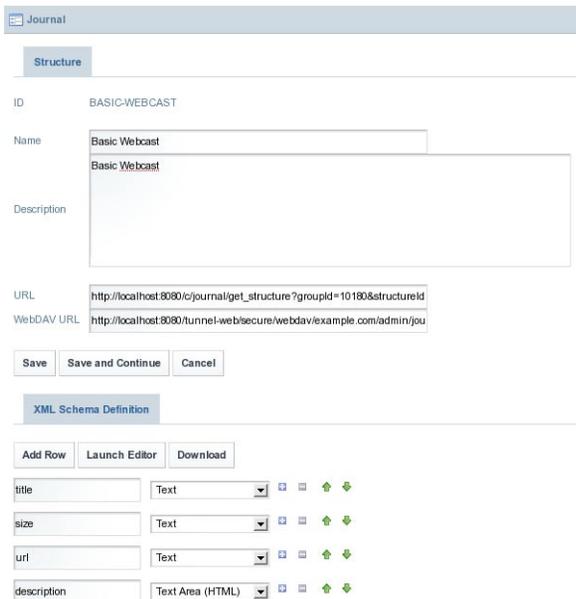


FIGURE 4–30 To edit a Structure

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.

Editing the name and description will not affect other features of the Journal portlet, but adding, deleting, and modifying fields will affect the templates and articles that are associated with the structure. It is advisable to backup the current XML file first by clicking the *Download* button so that it will be easy to revert to your old structure if necessary.

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.

The screenshot shows the 'Journal' administration interface. At the top, there's a 'Journal' header with a 'Return to Full Page' link. Below that, a tab labeled 'Article' is active, with a 'Back' button. The main content area is split into two columns. The left column contains form fields for 'ID' (with an 'Autogenerate ID' checkbox), 'Name', 'Language' (set to 'English (United States)'), 'Title', 'Size', 'Url', and 'Description', each with a 'Localized' checkbox. Below these is a rich text editor with a toolbar and a large text area. At the bottom left, there's a 'Permissions' section with a 'Configure' link and an 'Abstract' section with a 'Description' field. The right column contains several configuration panels: 'Workflow' (Status: New), 'Form and Presentation' (Structure: Basic Webcast, Template: Select), 'Categorization' (Type: General, Tags, Searchable), and 'Schedule' (Display Date, Expiration Date, Review Date).

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.

The screenshot shows the 'Template' configuration page. It includes the following elements:

- Journal** (Page Header)
- Template** (Section Header)
- ID**: Text input field with an **Autogenerate ID** checkbox.
- Name**: Text input field.
- Description**: Large text area.
- Cacheable**: with a help icon.
- Structure**: **Select** and **Remove** buttons.
- Language Type**: Dropdown menu showing **VM**.
- Script**: Text input field with a **Browse...** button.
- Format Script**: .
- Launch Editor**: Button.
- Small Image URL**: Text input field with a **Browse...** button.
- OR -- Small Image**: Text input field.
- Use Small Image**: .
- Permissions**: [Configure >](#) link.
- Save**, **Save and Continue**, and **Cancel** buttons.

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.

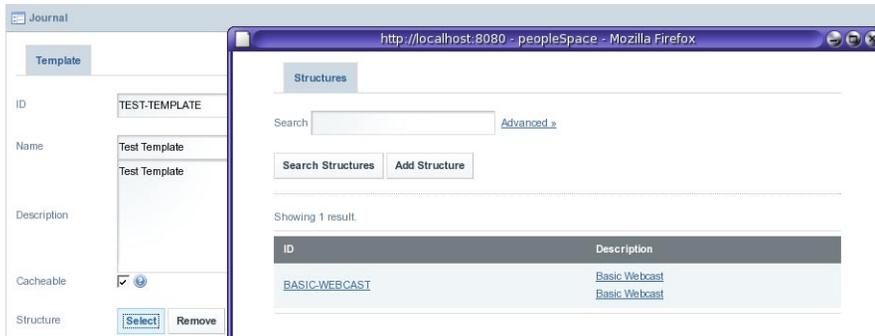


FIGURE 4–37 To create a Template

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.

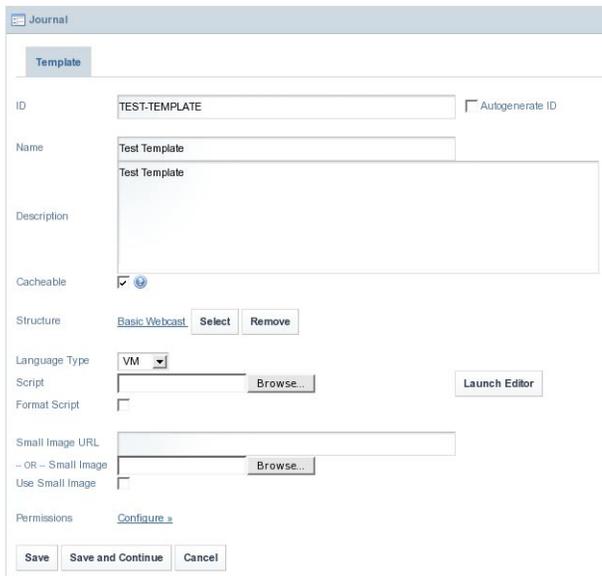


FIGURE 4–38 To create a Template

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.

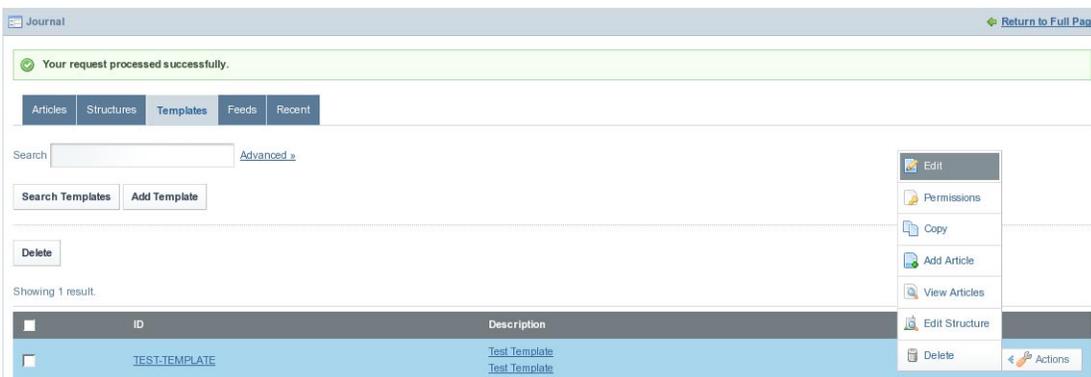


FIGURE 4–40 To edit a Template

- 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.

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.

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.

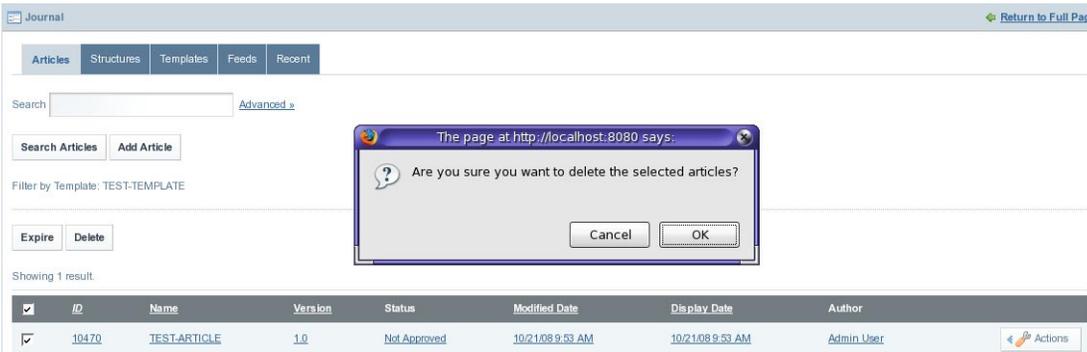


FIGURE 4-44 To delete a Template

3 Click on the Templates tag once again.

Select the template and click *Delete*.

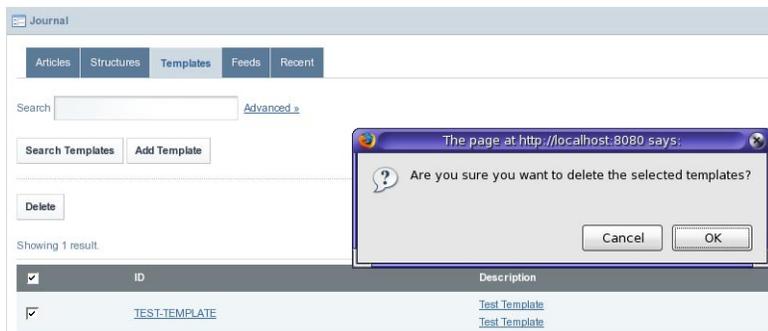


FIGURE 4–45 To delete a Template

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.

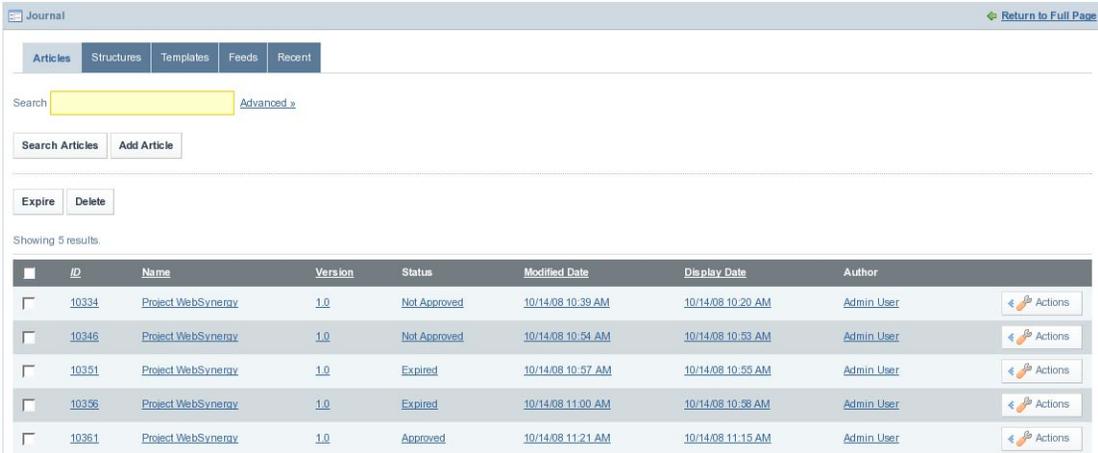


FIGURE 4-46 To create an Article

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

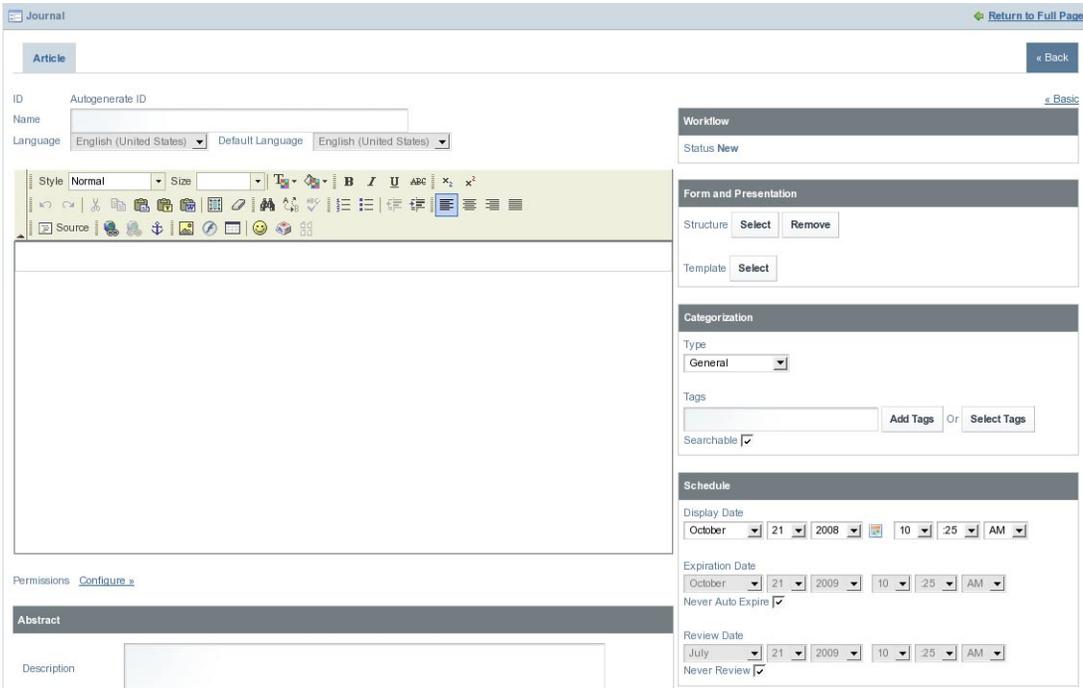


FIGURE 4-47 To create an Article

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*.

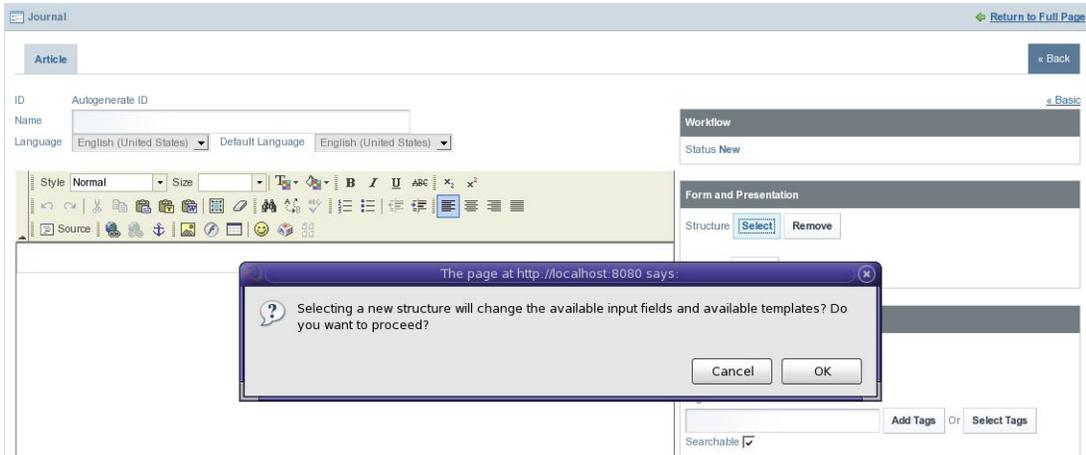


FIGURE 4-48 To create an Article

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.

FIGURE 4–49 To create an Article

If there is a template using the structure, the template is added to the article by default.

- 7 Specify a name for the article.
- 8 Choose the Type for Categorization that the article will reside in.

FIGURE 4–50 To create an Article

This will help make it easier for users to make manual searches of articles and organize articles.

- 9 Set the Schedule details.

Set values for *Display Date*, *Expiration Date*, and *Review Date* fields. The default setting does not set an expiration date and review date.

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 >](#)

Showing 6 results.

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	<input type="button" value="Edit"/> <input type="button" value="Actions"/>
10346	Project WebSynergy	1.0	Not Approved	10/14/08 10:54 AM	10/14/08 10:53 AM	Admin User	<input type="button" value="Permissions"/> <input type="button" value="Actions"/>
10351	Project WebSynergy	1.0	Expired	10/14/08 10:57 AM	10/14/08 10:55 AM	Admin User	<input type="button" value="Preview"/> <input type="button" value="Actions"/>
10356	Project WebSynergy	1.0	Expired	10/14/08 11:00 AM	10/14/08 10:38 AM	Admin User	<input type="button" value="Copy"/> <input type="button" value="Actions"/>
10361	Project WebSynergy	1.0	Approved	10/14/08 11:21 AM	10/14/08 11:15 AM	Admin User	<input type="button" value="Delete"/> <input type="button" value="Actions"/>
10478	TEST-ARTICLE1	1.0	Not Approved	10/21/08 11:31 AM	10/21/08 11:21 AM	Admin User	<input type="button" value="Actions"/>

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.

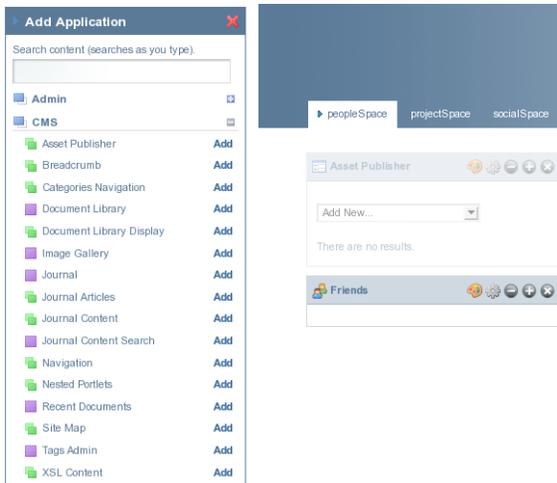


FIGURE 4–54 Asset Publisher portlet

Blogs Entry

To be done.

▼ To add a Blogs Entry

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

The screenshot shows the 'Blogs Entry' page. At the top, there's a 'Blogs' header and an 'Entry' sub-header. Below this, there are input fields for 'Title' and 'Display Date' (set to October 14, 2008, 4:22 AM). A rich text editor toolbar is visible above a large content area. The toolbar includes options for style (Normal), size, font color, background color, bold, italic, underline, link, unlink, list, and table. Below the content area, there is a checkbox for 'Allow Incoming Trackbacks' (checked), a 'Trackbacks to Send' field, and a 'Tags' section with 'Add Tags', 'Select Tags', and 'Suggestions' buttons. At the bottom, there are 'Publish' and 'Cancel' buttons.

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.

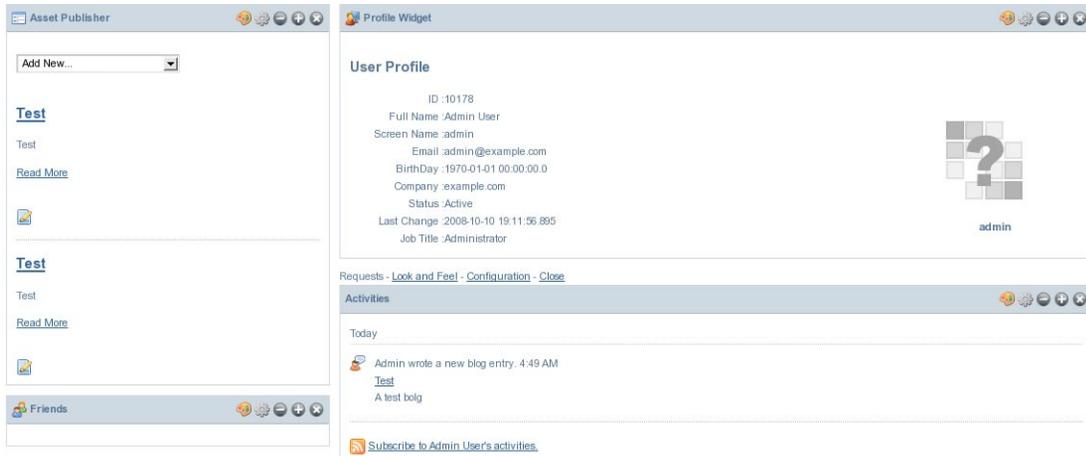


FIGURE 4–56 Blog entries

- 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

Name

URL

Description

Tags Or

Permissions [Configure >](#)

FIGURE 4-58 Entering a bookmark

- 2 Enter the bookmark
- 3 Click Select to select a folder.

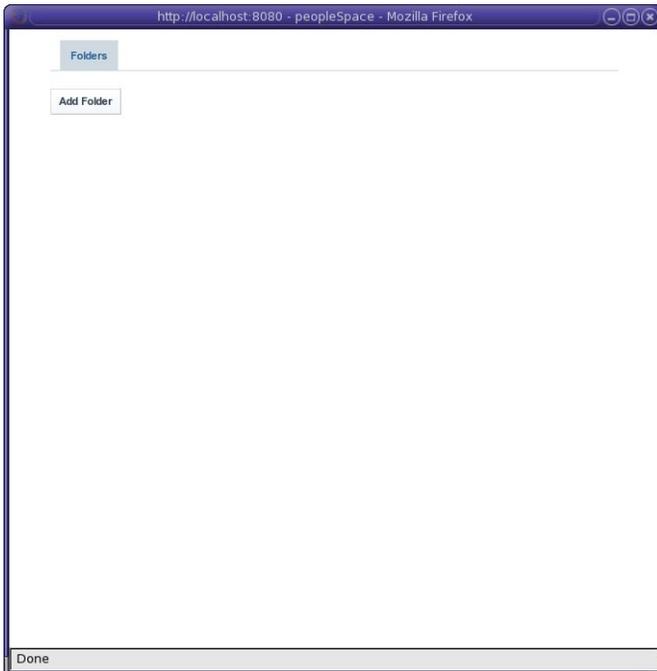


FIGURE 4-59 Selecting a folder

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 main content area is titled 'Folder' and contains the following elements:

- A 'Name' text input field containing 'SunURLs'.
- A 'Description' text area containing 'URLs of Sun Microsystems'.
- A 'Permissions' section with a 'Configure' link.
- 'Save' and 'Cancel' buttons at the bottom left.
- A 'Back' button at the top right.
- A 'Done' button at the bottom left of the browser window.

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 main content area is titled 'Folders' and contains the following elements:

- An 'Add Folder' button.
- The text 'Showing 1 result.'.
- A table with the following data:

Folder	# of Folders	# of Entries
SunURLs	0	0
- A 'Choose' button to the right of the table.

FIGURE 4-61 Choosing a folder for the bookmark

7 Click on the Choose button to choose the folder.

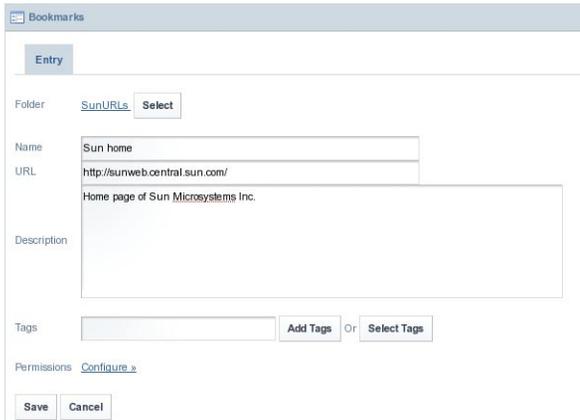


FIGURE 4–62 Saving the bookmark

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' interface. At the top, there's a 'Document' tab. Below it, the 'Folders' section indicates 'Upload documents no larger than 3000k'. The 'Folder' field contains 'Docs' and a 'Select' button. The 'File' field contains '/home/mp219492/Desk' 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. At the bottom, there's a 'Permissions' section with a 'Configure' link 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.

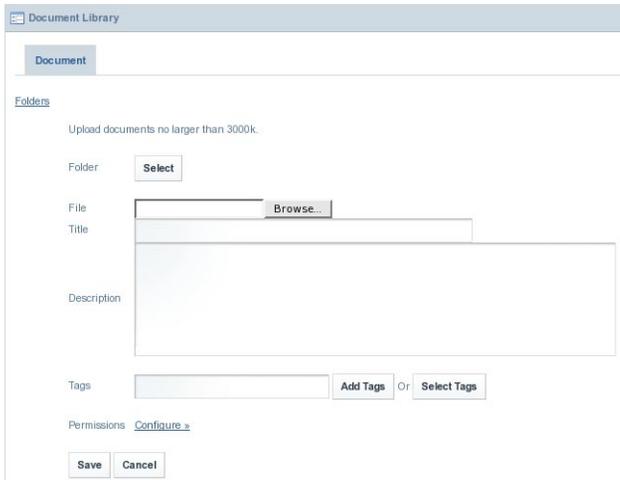


FIGURE 4–66 Document Library page

- 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.

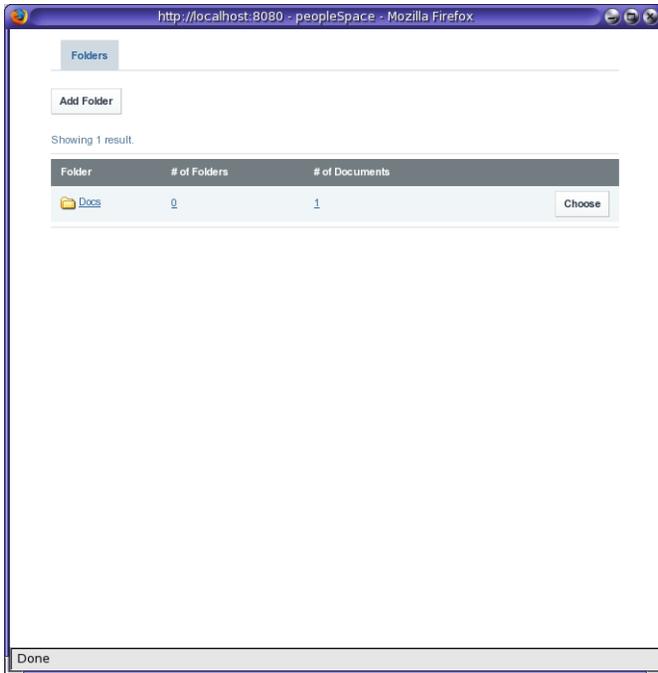


FIGURE 4-67 Choosing a documentation folder

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

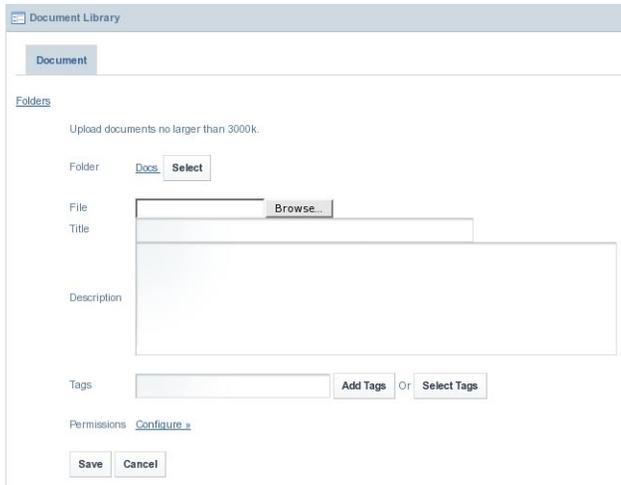


FIGURE 4–68 Selected folder (containing the document which need to be deleted)

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

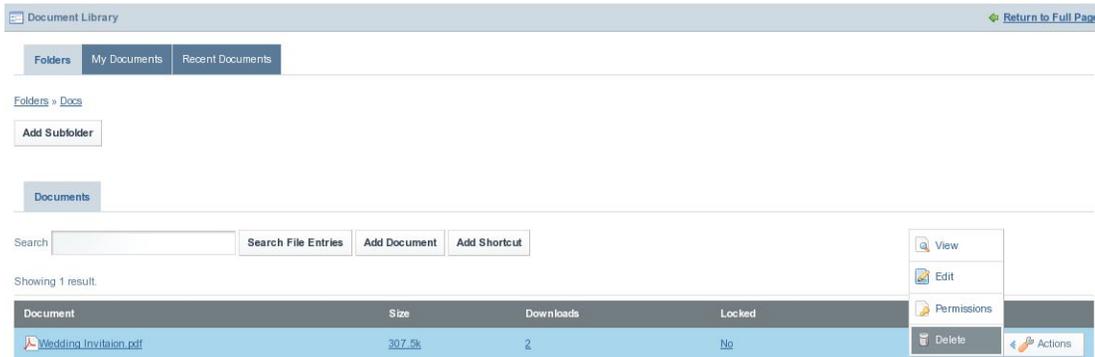


FIGURE 4–69 Deleting the document

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' creation interface. At the top, there's a 'Journal' header with a 'Return to Full Page' link and a 'Back' button. The main form is divided into several sections:

- Article Information:** Includes fields for 'ID' (with an 'Autogenerate ID' checkbox), 'Name' (set to 'Project WebSynergy'), and 'Language' (set to 'English (United States)').
- Workflow:** Shows 'Status' as 'New'.
- Form and Presentation:** Includes 'Structure' (with 'Select' and 'Remove' buttons) and 'Template' (with a 'Select' button).
- Categorization:** Includes 'Type' (set to 'General') and 'Tags' (with 'Add Tags' and 'Select Tags' buttons).
- Schedule:** Includes 'Display Date' (October 14, 2008, 10:40 AM), 'Expiration Date' (October 14, 2009, 10:40 AM), and 'Review Date' (July 14, 2009, 10:40 AM). Each date field has a 'Never Auto Expire' checkbox.
- Abstract:** Includes a 'Description' text area, 'Small Image URL' field, and a 'Browse...' button.
- Permissions:** A 'Configure' link is visible.
- Buttons:** At the bottom, there are 'Save', 'Save and Continue', 'Save and Approve', and 'Cancel' buttons.

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. [Back](#)

Article

ID: 10361 [Basic](#)

Name:

Language: Default Language:

Style: Normal | Size: | **B** *I* U ABC x₂ x₂

Project WebSynergy from Sun is aimed at creating a comprehensive portal solution using the latest in Java and Web 2.0 technologies.

Abstract

Description:

Small Image URL:

-- OR -- Small Image:

Use Small Image:

Workflow

Version: 1.0

Status: Approved

Increment Version on Save:

Form and Presentation

Structure:

Template:

Categorization

Type:

Tags: Or

Searchable:

Schedule

Display Date: ...

Expiration Date:

Never Auto Expire:

Review Date:

Never Review:

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.



FIGURE 4-74 Tags Admin Portlet

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

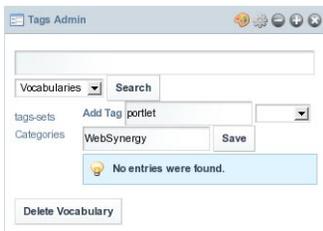


FIGURE 4-75 Adding a tag and a tag category

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

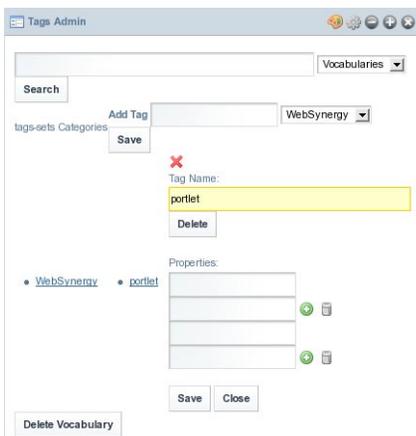


FIGURE 4-76 Tag vocabulary

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 (JPDL)* 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.bpm.handler.IdentityAssignmentHandler"
config-type="field">
<type>user</type>
<company.id>10113</company.id>
<id>10177</id>
</assignment>
</swimlane>
-
<swimlane name="approver">
-
<assignment class="com.liferay.bpm.handler.IdentityAssignmentHandler"
config-type="field">
<type>user</type>
<company.id>10113</company.id>
</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.

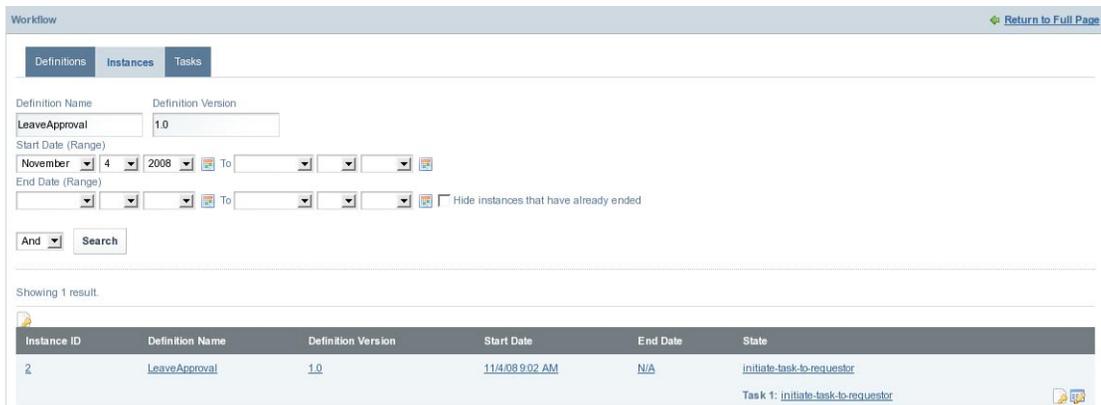


FIGURE 4-80 To Create a Workflow Instance

- 3 Click on the Manage button for the instance.



FIGURE 4–81 Manage button

- 4 Click Save to save the task.

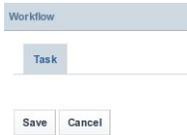


FIGURE 4–82 To Create a Workflow Instance

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.

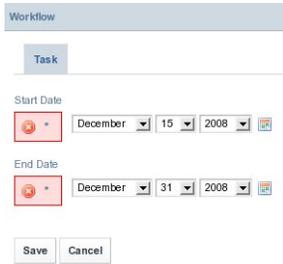
▼ Workflow Process Steps: To Request an Holiday

- 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.



The screenshot shows a 'Workflow' portlet with a 'Task' tab selected. Below the tab, there are two date pickers. The 'Start Date' is set to December 15, 2008, and the 'End Date' is set to December 31, 2008. At the bottom, there are 'Save' and 'Cancel' buttons.

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

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.

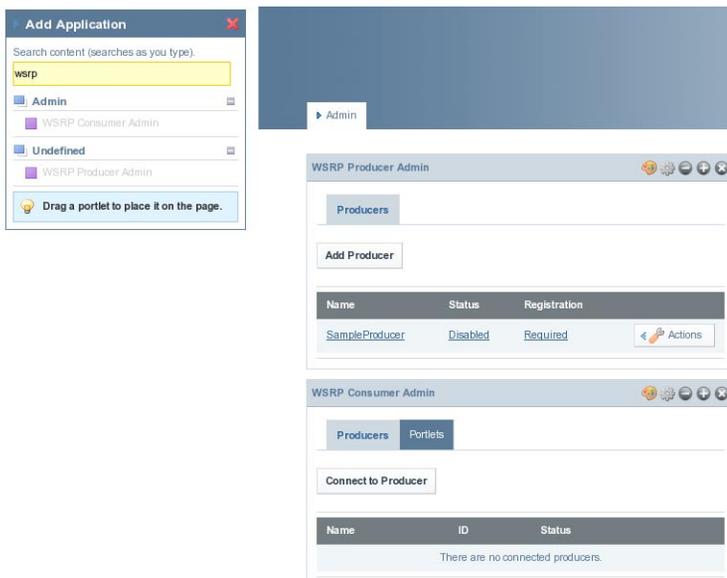


FIGURE 5-1 To add WSRP portlets to your page

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.

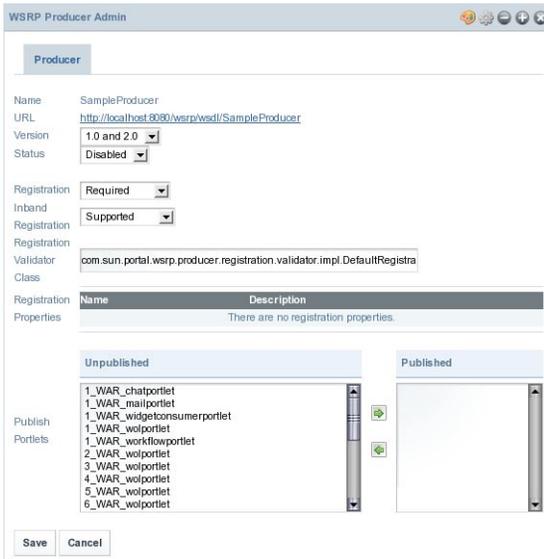


FIGURE 5-2 To enable the default WSRP Producer

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 wsrp 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 with a 'Producer' tab selected. The form contains the following fields:

- Name:** A text input field containing 'NewProducer'.
- Version:** A dropdown menu with '1.0 and 2.0' selected.
- Registration:** A dropdown menu with 'Required' selected.
- Inband Registration:** A dropdown menu with 'Supported' selected.

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

FIGURE 5-4 To Create a new WSRP Producer

2 Click Save.

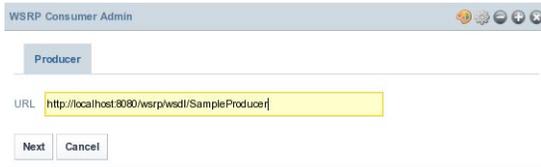
The Producer is created, but the new Producer will be disabled by default. Enable the Producer by following the [procedure](#).

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.



The screenshot shows the 'WSRP Consumer Admin' window with a 'Producer' tab selected. A text input field labeled 'URL' contains the text 'http://localhost:8080/wsrp/wsd/|SampleProducer|'. Below the input field are two buttons: 'Next' and '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*.



The screenshot shows the 'WSRP Consumer Admin' window with the 'Producer' tab selected. The 'URL' field is populated with 'http://localhost:8080/wsrp/wsd/|SampleProducer|'. Below the URL field, there is a 'Version' dropdown menu set to '2.0'. At the bottom, there are 'Next' and 'Cancel' buttons.

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.

The screenshot shows the 'WSRP Consumer Admin' portlet. It has a 'Producer' tab. The form contains the following fields:

- Name: SampleConsumer
- URL: http://localhost:8080/wsrf/wsdl/SampleProducer
- Version: 2.0
- Registration Type: Inband (selected from a dropdown)
- Registration Properties: A table with columns 'Name', 'Value', and 'Description'. The table is empty, with the text 'There are no registration properties.' below it.
- Lifetime: An unchecked checkbox.

At the bottom, there are 'Save' and 'Cancel' buttons.

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*.

The screenshot shows the 'WSRP Producer Admin' portlet. It has a 'Producer' tab. The form contains the following fields:

- Name: RegistrationFreeProducer
- Version: 1.0 and 2.0 (selected from a dropdown)
- Registration: Required (selected from a dropdown)
- Inband Registration: A dropdown menu is open, showing 'Required' and 'Not Required' options.

At the bottom, there are 'Save' and 'Cancel' buttons.

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.

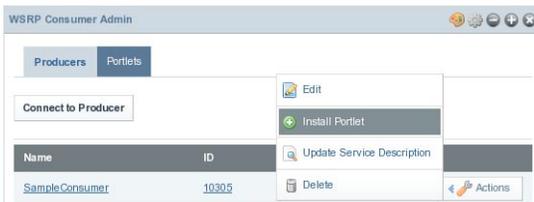


FIGURE 5–10 To create a WSRP Consumer

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 a web browser window titled "WSRP Consumer Admin". Inside the window, there is a tab labeled "Portlet". Below the tab, 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, there are two buttons: "Save" and "Cancel".

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.

Servlet 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.