

JBoss Portal Platform 6

User Guide

for use with JBoss Portal Platform 6 and its patch releases.

Edition 6.0.0



Edited by

Red Hat Documentation Group

Based on original product documentation by:

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Abstract

This document provides an easy to follow guide to the functions and options available in JBoss Portal Platform. It is intended to be accessible and useful to both experienced and novice portal users.

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Preface

1. Document Conventions

This manual uses several conventions to highlight certain words and phrases and draw attention to specific pieces of information.

In PDF and paper editions, this manual uses typefaces drawn from the [Liberation Fonts](#) set. The Liberation Fonts set is also used in HTML editions if the set is installed on your system. If not, alternative but equivalent typefaces are displayed. Note: Red Hat Enterprise Linux 5 and later includes the Liberation Fonts set by default.

1.1. Typographic Conventions

Four typographic conventions are used to call attention to specific words and phrases. These conventions, and the circumstances they apply to, are as follows.

Mono-spaced Bold

Used to highlight system input, including shell commands, file names and paths. Also used to highlight keycaps and key combinations. For example:

To see the contents of the file **my_next_bestselling_novel** in your current working directory, enter the **cat my_next_bestselling_novel** command at the shell prompt and press **Enter** to execute the command.

The above includes a file name, a shell command and a keycap, all presented in mono-spaced bold and all distinguishable thanks to context.

Key combinations can be distinguished from keycaps by the plus sign that connects each part of a key combination. For example:

Press **Enter** to execute the command.

Press **Ctrl+Alt+F2** to switch to a virtual terminal.

The first paragraph highlights the particular keycap to press. The second highlights two key combinations (each a set of three keycaps with each set pressed simultaneously).

If source code is discussed, class names, methods, functions, variable names and returned values mentioned within a paragraph will be presented as above, in **mono-spaced bold**. For example:

File-related classes include **filesystem** for file systems, **file** for files, and **dir** for directories. Each class has its own associated set of permissions.

Proportional Bold

This denotes words or phrases encountered on a system, including application names; dialog box text; labeled buttons; check-box and radio button labels; menu titles and sub-menu titles. For example:

Choose **System** → **Preferences** → **Mouse** from the main menu bar to launch **Mouse Preferences**. In the **Buttons** tab, click the **Left-handed mouse** check box and click **Close** to switch the primary mouse button from the left to the right (making the mouse suitable for use in the left hand).

To insert a special character into a **gedit** file, choose **Applications** → **Accessories** → **Character Map** from the main menu bar. Next, choose **Search** → **Find...** from the **Character Map** menu bar, type the name of the character in the **Search** field and click **Next**. The character you sought will be highlighted in the **Character Table**. Double-click this highlighted character to place it in the **Text to copy** field and then click the **Copy** button. Now switch back to your document and choose **Edit** → **Paste** from the **gedit** menu

bar.

The above text includes application names; system-wide menu names and items; application-specific menu names; and buttons and text found within a GUI interface, all presented in proportional bold and all distinguishable by context.

Mono-spaced Bold Italic* or *Proportional Bold Italic

Whether mono-spaced bold or proportional bold, the addition of italics indicates replaceable or variable text. Italics denotes text you do not input literally or displayed text that changes depending on circumstance. For example:

To connect to a remote machine using ssh, type **ssh *username@domain.name*** at a shell prompt. If the remote machine is **example.com** and your username on that machine is john, type **ssh john@example.com**.

The **mount -o remount *file-system*** command remounts the named file system. For example, to remount the **/home** file system, the command is **mount -o remount /home**.

To see the version of a currently installed package, use the **rpm -q *package*** command. It will return a result as follows: ***package-version-release***.

Note the words in bold italics above — *username*, *domain.name*, *file-system*, *package*, *version* and *release*. Each word is a placeholder, either for text you enter when issuing a command or for text displayed by the system.

Aside from standard usage for presenting the title of a work, italics denotes the first use of a new and important term. For example:

Publican is a *DocBook* publishing system.

1.2. Pull-quote Conventions

Terminal output and source code listings are set off visually from the surrounding text.

Output sent to a terminal is set in **mono-spaced roman** and presented thus:

```
books      Desktop  documentation  drafts  mss    photos  stuff  svn
books_tests Desktop1  downloads      images  notes  scripts svgs
```

Source-code listings are also set in **mono-spaced roman** but add syntax highlighting as follows:

```
package org.jboss.book.jca.ex1;

import javax.naming.InitialContext;

public class ExClient
{
    public static void main(String args[])
        throws Exception
    {
        InitialContext iniCtx = new InitialContext();
        Object          ref    = iniCtx.lookup("EchoBean");
        EchoHome        home   = (EchoHome) ref;
        Echo             echo   = home.create();

        System.out.println("Created Echo");

        System.out.println("Echo.echo('Hello') = " + echo.echo("Hello"));
    }
}
```

1.3. Notes and Warnings

Finally, we use three visual styles to draw attention to information that might otherwise be overlooked.



Note

Notes are tips, shortcuts or alternative approaches to the task at hand. Ignoring a note should have no negative consequences, but you might miss out on a trick that makes your life easier.



Important

Important boxes detail things that are easily missed: configuration changes that only apply to the current session, or services that need restarting before an update will apply. Ignoring a box labeled 'Important' will not cause data loss but may cause irritation and frustration.



Warning

Warnings should not be ignored. Ignoring warnings will most likely cause data loss.

2. Getting Help and Giving Feedback

2.1. Do You Need Help?

If you experience difficulty with a procedure described in this documentation, visit the Red Hat Customer Portal at <http://access.redhat.com>. Through the customer portal, you can:

- ▶ search or browse through a knowledgebase of technical support articles about Red Hat products.
- ▶ submit a support case to Red Hat Global Support Services (GSS).
- ▶ access other product documentation.

Red Hat also hosts a large number of electronic mailing lists for discussion of Red Hat software and technology. You can find a list of publicly available mailing lists at <https://www.redhat.com/mailman/listinfo>. Click on the name of any mailing list to subscribe to that list or to access the list archives.

2.2. Give us Feedback

If you find a typographical error, or know how this guide can be improved, we would love to hear from you. Submit a report in Bugzilla against the product **JBoss Portal Platform 6** and the component **docs-User_Guide**. The following link will take you to a pre-filled bug report for this product: <http://bugzilla.redhat.com/>.

Fill out the following template in Bugzilla's **Description** field. Be as specific as possible when describing the issue; this will help ensure that we can fix it quickly.

Document URL:

Section Number and Name:

Describe the issue:

Suggestions for improvement:

Additional information:

Be sure to give us your name so that you can receive full credit for reporting the issue.

Chapter 1. Introduction

JBoss Portal Platform is the merge of two mature Java projects; JBoss Portal and eXo Portal. This new community project takes the best of both offerings and incorporates them into a single J2EE deployment archive. The aim is to provide an intuitive user-friendly portal and a framework to address the needs of today's Web 2.0 applications.

This book introduces and provides detailed information about most features and capabilities of JBoss Portal Platform such as user/group management and access permissions, using portlets and changing basic interface objects such as skins, language and page orientation.

1.1. Related Links

Technical documentation

Other technical documentation, including an **Installation Guide**, a **Reference Guide** and component specific documentation, can be found at www.redhat.com/docs

Non-technical documentation

Links to non-technical documents are included on the front page of the portal:



Chapter 2. Supported Browsers

JBoss Portal Platform has been tested, and is supported, on the following web browsers:

- ▶ [Firefox](#) (versions 3.5 to 10).
- ▶ [Internet Explorer](#) (versions 7 to 9).
- ▶ [Google Chrome](#).
- ▶ [Safari](#) (read-only).

This list will be expanded as newer browser versions are released and tested.

Chapter 3. Glossary

3.1. Portal

An enterprise portal is a Web application that provides means to aggregate and personalize information via application-specific portlets.

Users and administrators are able to integrate information, people and processes across organizational boundaries via a web-based user interface.

The framework enables aggregation of enterprise content and business applications with flexible management and personalization options.

3.2. Portlet

A portlet is a small, self-contained web application. Portlets are managed and displayed within a Portal. Typically, a *portal* page is displayed as a collection of non-overlapping *portlet* windows, with each portlet window displaying a different portlet. Hence a portlet (or collection of portlets) resembles a web-based application hosted in a portal.

Portlets can be configured with differing content and JBoss Portal Platform has a number of default portlets that can be used in any portal built in the application.

3.3. Portlet Container

A portlet container supplies the runtime environment in which portlets are started, run and ended. While portlet containers can allow portlets to inherit data from the main portal they also provide an environment in which portlets can be independently managed. APIs dictate both how a portal interacts with portlet containers and how portlet containers interact with individual portlets.

3.4. Toolbar

The Toolbar spans the top of the portal application and provides links to user and administrative actions.

This screenshot displays three Navigations referred to in [Section 3.5, "Navigation"](#) as well as the main Menu button (on the far left of the toolbar) and the name of the current user (on the far right).

In this example the current user is the site administrator, hence the extra "Site Editor" menu.

3.5. Navigation

Portal navigations are menus that contain hyperlinks to other parts of a Portal. They can help users to visualize the structure of a site. The default navigation menus in JBoss Portal Platform are located in the Toolbar ([Section 3.4, "Toolbar"](#)).

There are three navigation types.

Site

This navigation links to separate sites of the parent Portal. Each site has only one navigation and it is automatically generated when the site is created.

This functionality allows different sites to administer some Portal aspects (such as portlets) individually while maintaining other content standardized with the parent Portal.

Group

The content of this navigation differs depending on the type of account logged in.

- ▶ If a user account is active, this navigation holds personal links set up by that user.
- ▶ When using a management account, this navigation contains links to pages for registered users as well as administrative tasks and personal links.
- ▶ In an administrator account the navigation adds further management abilities, such as community and application management.

Dashboard

Each user has own navigation 'Dashboard' that contains links and portlets (or gadgets) that the user has selected. A user's navigation is created automatically when user is registered. This navigation only can be deleted when the user is deleted.

Dashboard Editor

The **Dashboard Editor** navigation appears when a user is on their dashboard page.

The user can add multiple dashboard in new tabs and then edit the layout and content of those dashboards.

When logged in as an Administrator, a fourth navigation appears in the Toolbar:

Site/Group Editor

This navigation appears as either **Site Editor** or **Group Editor** depending on the administrator's location within the portal.

When in areas of the portal displaying content, the navigation shows as **Site Editor** and in areas pertaining to users the navigation shows as **Group Editor**.

This navigation contains links to add a new pages to the portal, to edit a page or to change the portal's layout. Administrators can use these links to manage the portal.

3.6. Gadgets

A gadget is a customizable mini web application that portal users may add to their web pages.

For more information about the gadgets shipped by default with JBoss Portal Platform, please check out [Section 4.3.1, "Using the Dashboard Workspace"](#)

3.7. Modes

By default JBoss Portal Platform offers two access **modes**:

Public

This mode is for guest users who are not registered with the Portal. It does not require a log in and restricts the visitor to the public pages in the portal. Visitors can register an account to gain access to the restricted pages. After being registered, they can use the Private mode but must still contact the Portal administrator to get more rights or a group manager to become a member and gain access to a group.

Private

This mode is for registered users only. Users set a username and password during registration which they can then use to sign in. This mode offers users more site privileges. Registered users can manage private resources (creating, editing or deleting private pages), "borrow" pages from other users by creating hyperlinks and change the language for individual needs.

3.8. Permissions

Permission settings control what users can and cannot do within the portal and are set by portal administrators.

Permission **types** dictate what a user can do within the portal. Two permission types are available as follows:

Access

This permission type allows users to utilize portal content, that is; sign in, rearrange portlets, etc. This permission can be set for multiple member groups.

Edit

This permission type allows users to change portal content. This includes actions such as changing page information, deleting pages etc. The *edit* permission is set for only one group at a time.

Permission **levels** dictate *where* in the portal the user's permission type applies. There are three permission levels:

Portal

The portal permission level includes all pages within the portal. Therefore, a user with the **access** permission type can view (but not edit) all the pages within the portal. A user with **edit** permission at the portal level, can change any page in the portal.

Page

The page permission level restricts the user to particular pages. Users are only able to see and/or edit (depending on their permission **type**) pages they have been given access to.

Portlet

The portlet permission level allows users to create a page by dragging and dropping portlets into a page. Some portlets are only used for administrators while some are used for individuals thus administrators have to set the appropriate access permissions.

Permission **types** and **levels** can be used to effectively control who can do what within the portal. For more information on setting permissions refer to [Section 6.6, "Manage Permissions"](#)

Chapter 4. Portlets

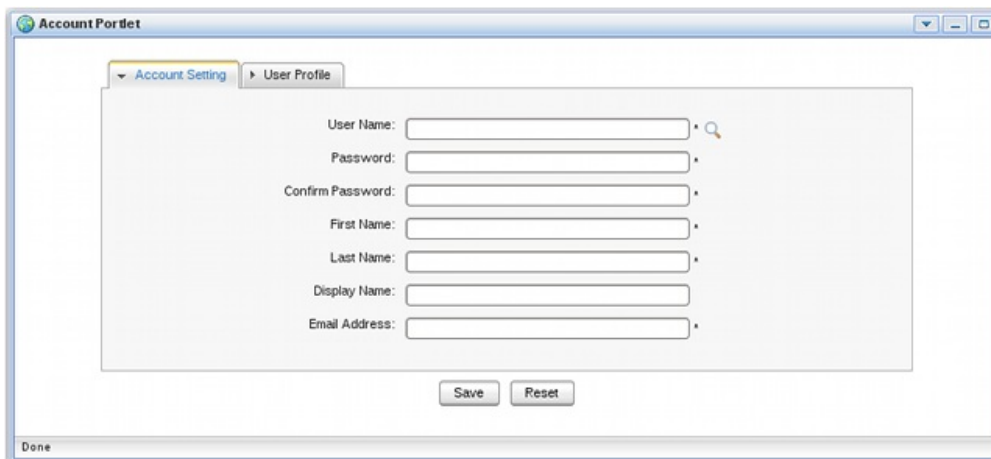
4.1. Functional Portlets

Portlets are pluggable user interface components that are managed and displayed within a portal. Functional Portlets support all functions of a Portal. They are built into the portal and are accessed via toolbar links as required when undertaking portal tasks.

JBoss Portal Platform provides the following portlets by default:

Account Portlet

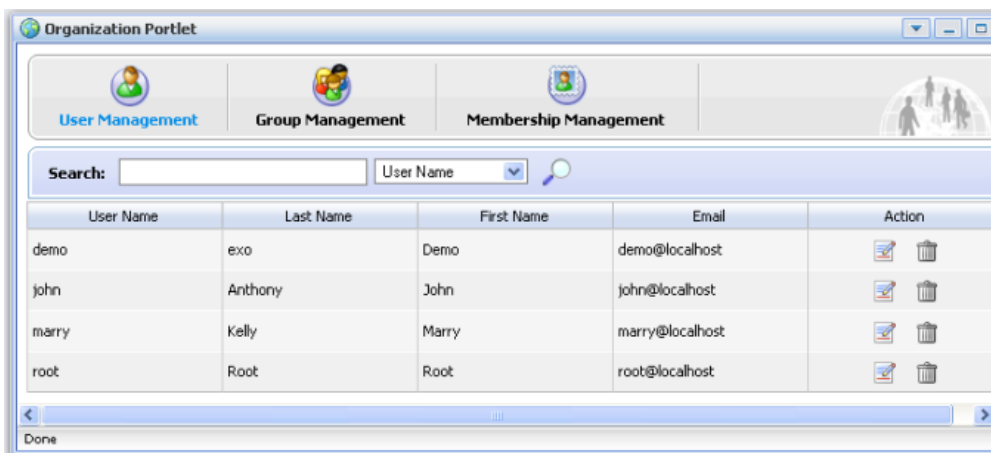
The Account Portlet allows users to register a new account and choose a preferred language for displaying the Portal interface.



The screenshot shows the 'Account Portlet' window with two tabs: 'Account Setting' and 'User Profile'. The 'User Profile' tab is active, displaying a registration form with the following fields: User Name, Password, Confirm Password, First Name, Last Name, Display Name, and Email Address. Each field has a small magnifying glass icon to its right. At the bottom of the form are 'Save' and 'Reset' buttons. The status bar at the bottom left shows 'Done'.

Organization Portlet

The Organization Portlet is used to manage user information, groups of users and groups memberships.

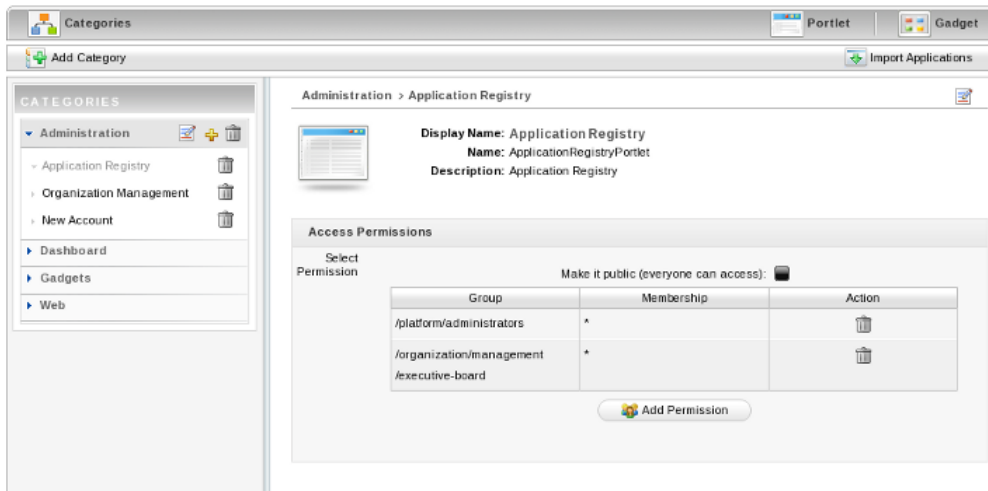


The screenshot shows the 'Organization Portlet' window with three tabs: 'User Management', 'Group Management', and 'Membership Management'. The 'User Management' tab is active, displaying a search bar and a table of users. The search bar has a dropdown menu set to 'User Name'. The table has columns for User Name, Last Name, First Name, Email, and Action. The Action column contains icons for edit and delete. The status bar at the bottom left shows 'Done'.

User Name	Last Name	First Name	Email	Action
demo	exo	Demo	demo@localhost	
john	Anthony	John	john@localhost	
marry	Kelly	Marry	marry@localhost	
root	Root	Root	root@localhost	

Application Registry Portlet

The Application Registry Portlet is used to manage different application categories. You can add, edit, set permissions and delete a category and its applications.



Star Toolbar Portlet

The Star Toolbar Portlet is used to change the default language, the skin of the portal or to sign out.



4.2. Interface Portlets

The Interface Portlets are the front-end components of the Portal. They provide ways for users to interact with the portal. JBoss Portal Platform provides the following Interface Portlets:

Homepage Portlet

This Portlet is the home page for a portal. The home page is the first page displayed when you visit the site.

Banner Portlet

This Portlet contains the organization's slogan, logo, and icons.

Navigation Portlet

This Portlet provides a navigation bar. A navigation bar is a menu that helps users to visualize the structure of a site and provide links to quickly move from page to page.

Sitemap Portlet

This Portlet displays a site map page of a web site. It lists pages on a website, typically organized in hierarchical fashion.

Breadcrumbs Portlet

This Portlet displays the 'path' the user has taken from the home page to arrive at the current page.

Dashboard Portlet

This portlet is used for hosting mini-applications known as gadgets. The dashboard uses a variety of graphical effects for displaying, opening, and using gadgets.

Refer to [Section 4.3, “The Dashboard”](#) or [Chapter 8, *Portlets and Gadgets Administration*](#) for more information.

IFrame Portlet

This Portlet is used to create inline frames (IFrame) elements for a site. An IFrame is an HTML element which can embed another document into a parent HTML document. By using IFrames, embedded data is displayed inside a sub-window of browser.

Gadget Wrapper Portlet

This Portlet allows users to view a gadget in canvas mode.

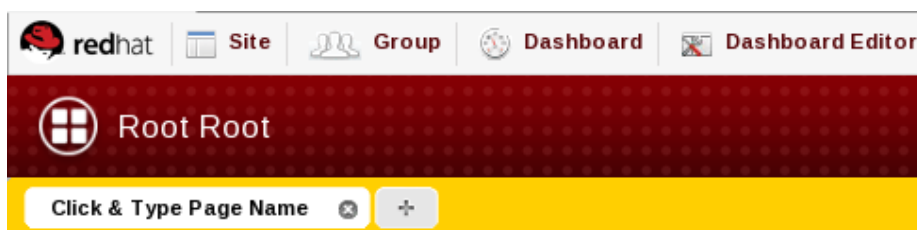
Footer Portlet

This Portlet provides the footer for a site. This footer provides information or links about the site's author/institutional sponsor, the date of the last revision made to the site, copyright information, comments form and navigational links.

4.3. The Dashboard

The Dashboard is used for hosting mini-applications known as gadgets. The Dashboard uses a variety of graphical effects for displaying, opening and using gadgets.

The active Dashboard can be individually named by double clicking on the default name ("*Click and Type Page Name*") and entering a new name:



The Dashboard can also be tabbed to create multiple spaces. Open a new tab by clicking the + button beside the Dashboard name.

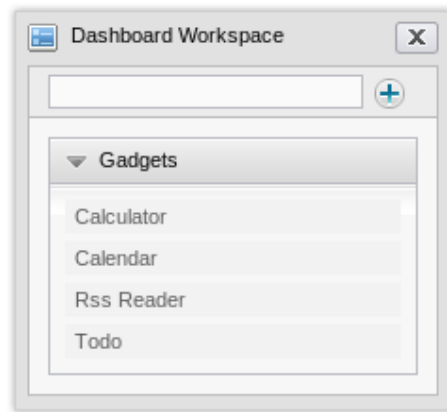
New tabs can also be individually named and managed.

Gadgets within the Dashboard can be moved and rearranged. New gadgets can be created and unnecessary ones deleted. More than one instance of the same gadget can be opened at the same time and each instance of the same gadget can have different settings. The gadgets instances are completely independent.

4.3.1. Using the Dashboard Workspace

1. Click on **Dashboard** in the toolbar to access the Dashboard.
2. Click on **Add Gadgets** to open the Dashboard Workspace.

The Dashboard Workspace lists all available gadgets. Seven gadgets are provided by default with JBoss Portal Platform, however you can add many more.



Default Gadgets: Calendar

The calendar gadget helps track and plan your events and activities.



Todo

This application helps you organize your day and work group. It is designed to keep track of your tasks in a convenient and transparent way.



Calculator

This mini-application lets you perform most basic arithmetic operations and can be themed to match the rest of your portal.



RSS Reader

An RSS reader, or aggregator, collates content from various, user-specified feed sources and displays them in one location. This content can include, but isn't limited to, news headlines, blog posts or email. The RSS Reader gadget displays this content in a single window on your Portal page.



To use one of the default gadgets, simply drag it from the **Dashboard Workspace** onto your Dashboard as illustrated below:

4.3.2. Add Gadgets

Many more gadgets can be found at [Google Gadgets](http://www.google.com/gadgets). JBoss Portal Platform is compatible with most of the gadgets available there.



Gadget Whitelist

Only gadgets that have been added to the whitelist by the administrator can be used. For more information, refer to the *Gadget Proxy Configuration* Chapter of the JBoss Portal Platform Installation Guide available at <http://docs.redhat.com>.

To add gadgets from external sources:

1. Obtain the URL (.xml or .rss) of the gadget you wish to add from the gadget source.

The gadgets available at [Google Gadget](#) provide a link to **View source**. Clicking on this link will open a page showing the gadget's XML source. Use the URL of this page in the Dashboard Workspace. The URL should end with **.xml**

For example:

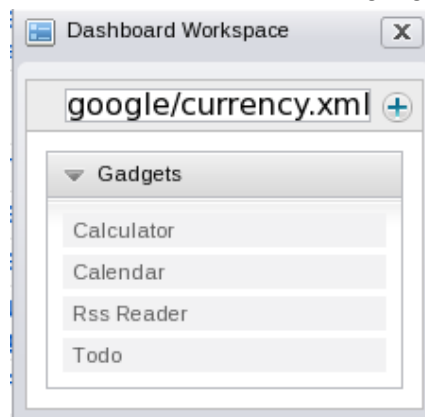
```
http://www.donalobrien.net/apps/google/currency.xml
```



URL Types

Remote gadgets can be only created using an .xml link or RSS URL. However, if you use a link that generates an RSS feed (for example: <http://feeds.feedburner.com/gatein>), a new RSS reader gadget will be created automatically even if the URL does not end with **.rss**.

2. Return to your portal and click **Dashboard** in the toolbar.
3. Click on **Add Gadgets** in the Dashboard to open the Dashboard Workspace.
4. The Dashboard Workspace dialog appears.
5. Paste the URL obtained in step 1 into the text box above the gadget list.



6. Click on the **plus** icon to add the new gadget to the page.
The new gadget will appear on the Dashboard alongside any other gadgets already in use. If required, the new gadget can be dragged to another position on the page.

Chapter 5. Accounts

5.1. Register New Accounts

Unregistered users visiting a portal in public mode are limited in the content they can see.

Users who need access to deeper content or who need to perform actions within the portal should register themselves and then contact the portal administrator to gain appropriate access permissions to their account.

Users can quickly and easily register a new account for themselves.

1. Click **Register** on the Navigation bar.

The **Register New Account** page appears. Complete the form with the required information:

User Name

The name used to log in. This username must be between 3 and 30 characters long, start with a lowercase letter and end with a lowercase letter or digit. Only lowercase letters, digits, dots and underscore characters are allowed for the username. Click the magnifying glass icon beside the user name to check whether the chosen username is available.

Password

The password must be between 6 and 30 characters and can contain spaces.

Confirm Password

Re-type the password above. The *Password* and *Confirm Password* fields must be the same.

First Name

The user's first name. This name must be between 1 and 45 characters long.

Last Name

The user's last name. This name must also be between 1 and 45 characters long.

Display Name

The user's name displayed in portal screens when the user is logged in. The field is optional and if no value is entered, a value in the *<First Name> <Last Name>* format is used automatically.

Email Address

The user's email address. This must be in the appropriate format. For example:
username@abc.com.

2. Enter the text displayed at **Text Validation** into the empty field below it.



Note

This field can be disabled by an administrator by following the instructions in [Task: Disable "Register New Account" Captcha Behavior](#).

3. Click **Subscribe** to register a new account or **Reset** to refresh all entered values. You cannot add a new account if one of the following cases occurs:
 - ▶ The chosen **User name** already exists or is invalid.
 - ▶ The **User name** has less than 3 characters or more than 30 characters.

- ▶ The **Password** has less than 6 characters or more than 30 characters.
- ▶ The **Password** and **Confirm Password** fields are not the same.
- ▶ The **Email Address** format is not valid.
- ▶ The **text verification** is not correct.
- ▶ A required field (or fields) is empty.

After adding a new account, you should contact the administrator to set appropriate permissions on your account.



Note

Be sure you enter your email address carefully. Should you forget your user name or password, you can recover it from this email address.

5.1.1. **BZ#794451** **Captcha Behavior**

You can set whether Captcha is used to verify whether an account creation event has been initiated by an actual person. The Captcha behavior is enabled by default in the Register Account portlet.

BZ#794451 **Task: Disable "Register New Account" Captcha Behavior**

Complete this task to control how Captcha behaves when a user registers an account.

Prerequisites

- ▶ You are logged into the portal using an account with Administrator privileges.

1. Click **Group+Administration+Page Management**.
2. Click the **Edit Page** icon in the Action column for the portal::classic::register Page ID.
3. Click on the Register Account portlet, and then click the Edit Portal icon (pencil icon) to open portlet properties.



Note

Click the **Switch View mode** button in the Page Editor control to switch between WYSIWYG and Object mode.

4. Click the Edit Mode tab (if not already selected), and clear the **Use captcha** box to disable Captcha verification for new users.
5. Click **Save**, and then click **Close** to commit the changes.
6. In the Page Editor control, click **Switch View mode** to refresh the portlet.

7. **Result**

The Register New Account portlet will no longer display the Captcha field.

5.2. Sign In and Sign Out

In order to enter the portal in private mode, you should use the account previously registered.

To sign in to a portal, users must complete the **Sign in** form:

This form contains the following elements:

User name

The registered user name.

Password

The registered password.

Remember My Login

Check this box to avoid log in every time

Forgot your User Name/Password?

To follow some steps to get the forgotten user name or password. Please refer to [Section 5.5, "Account and Password Retrieval"](#) for more details.

Sign in

To sign into JBoss Portal Platform with user name and password.

Discard

Close the Sign In form without logging in.

5.2.1. Sign In

1. Go to your portal by entering the URL into the address bar of your browser (For example **http://localhost:8080/portal**).
2. Click the **Sign in** link at the top right of the page if you are current in the Classic portal. The **Sign in** form appears.
3. Input your registered **User name** and **Password** .
4. Select the **Remember My Login** check box when you sign in JBoss Portal Platform at the first time if you want to automatically return to JBoss Portal Platform without signing in again. You can see [Section 5.3, "Remember User Account"](#) for more details.
5. Click the **Sign in** button to submit the form or **Discard** to escape.

If the user name does not exist or the user name and/or password is invalid you will be redirected to the JBoss Portal Platform Sign In form. Enter a correct user name and password.

After signing in, you will be redirected to the homepage and welcomed with your full name in the top right corner of the page.

5.2.2. Sign Out

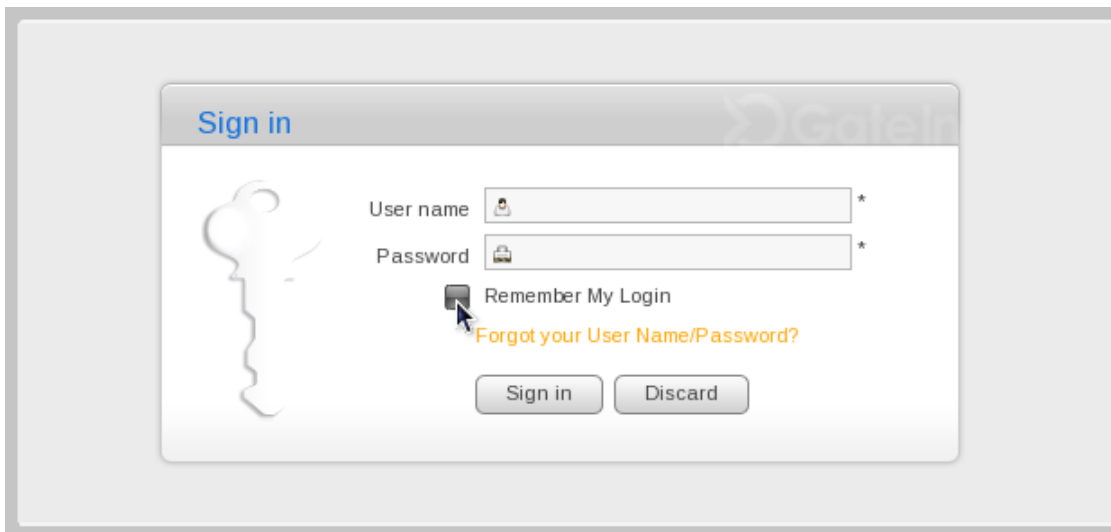
This feature ends the authenticated session and returns the user to the anonymous portal.

1. In the upper left corner of the screen, hover your cursor over the JBoss Portal Platform icon. A drop down menu will appear.
2. Click **Sign out** :



5.3. Remember User Account

Users who return to JBoss Portal Platform regularly can be automatically authenticated to avoid performing an explicit authentication each time they access the portal.

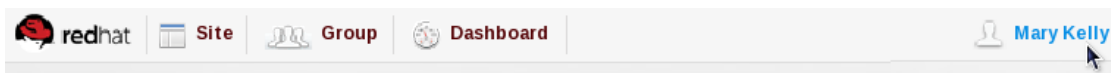


1. Input your registered user name and password.
2. Select the **Remember My Login** check box when logging in JBoss Portal Platform at the first time.
3. Click the **Sign in** button to sign in the portal.

Do not sign out when you leave the portal and you will be automatically authenticated next time you visit it.

5.4. Change Account Settings

To change your account information, click on the account name in the top navigation bar:



The **Account Profiles** form will appear:

To change your Account Profile information:

1. Select the **Account Profiles** tab.
2. Your **User Name** cannot be changed. You can change your: **First Name** , **Last Name** , **Display Name** and **Email**.
3. Once the desired changes have been made, click the **Save** button to submit them.

If you want to change your **Password** :

1. Select the **Change Password** tab, it will display the following form.
2. Input your current password to identify that you are the owner of this account.
3. Input your new password, it must have at least 6 characters
4. Re-enter your password in the **Confirm New Password** field.
5. Click the **Save** button to accept changes.

5.5. Account and Password Retrieval

You can recover your username or password should you forget them by following these steps:

1. Click the link '**Forgot your User Name/Password?**'
2. The next screen offers two options:
 - ▶ **Forgot my password.**
 - ▶ **Forgot my username.**

Select the appropriate option and click **Next**.

3. You will be prompted to provide identification information depending on which option you selected:
 - ▶ If you selected the **Forgot my password** option you will be prompted for your username.

- ▶ If you selected **Forgot my username** you will be prompted for your email address.

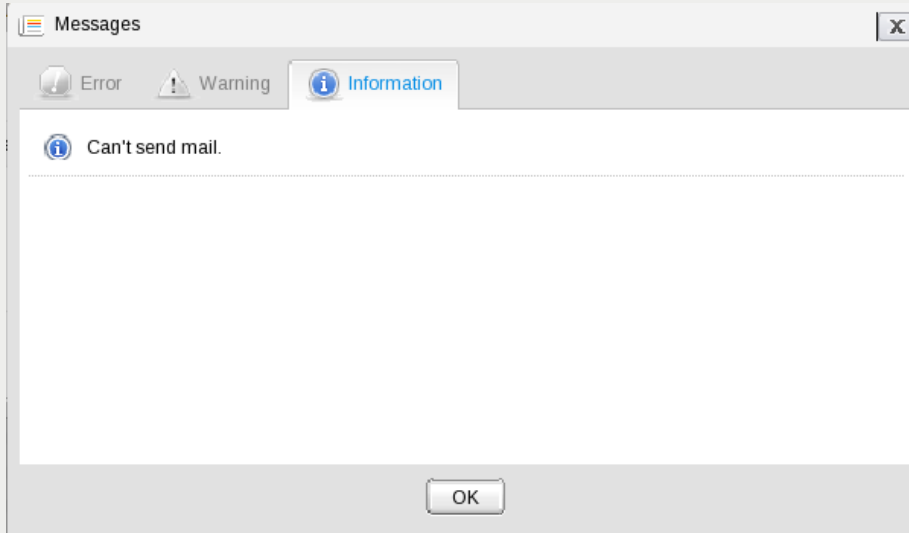
After you submit the form an email will be send to your email address to assist you.

If you forgot your password you will be sent a link to application that will allow you to edit your password. Your original password will not be valid after this email is sent.



Email Error

If you receive an error message advising that the email could not be sent, you may need to configure (or reconfigure) your email settings in the **configuration.properties** file.



More information about this configuration can be found in **Section 5.2.2** of the **JBoss Portal Platform Installation Guide** at www.redhat.com.

Chapter 6. Portal Administration

6.1. Toolbar

The Toolbar offers a convenient way for users and administrators to execute tasks within the portal quickly and easily.

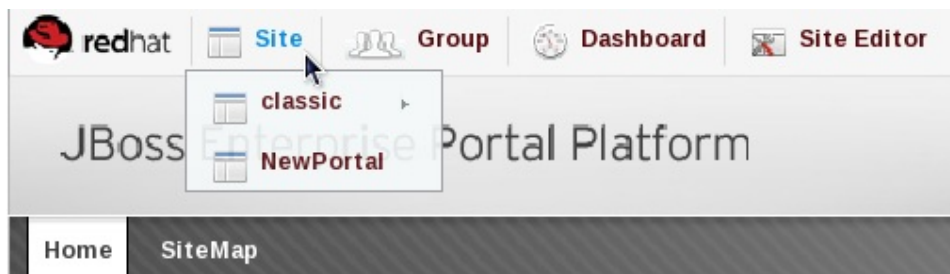
6.1.1. User Actions in the Toolbar

User Menu

You can use the main menu (located under the product icon) to change the language or skin used in the portal or to sign out.

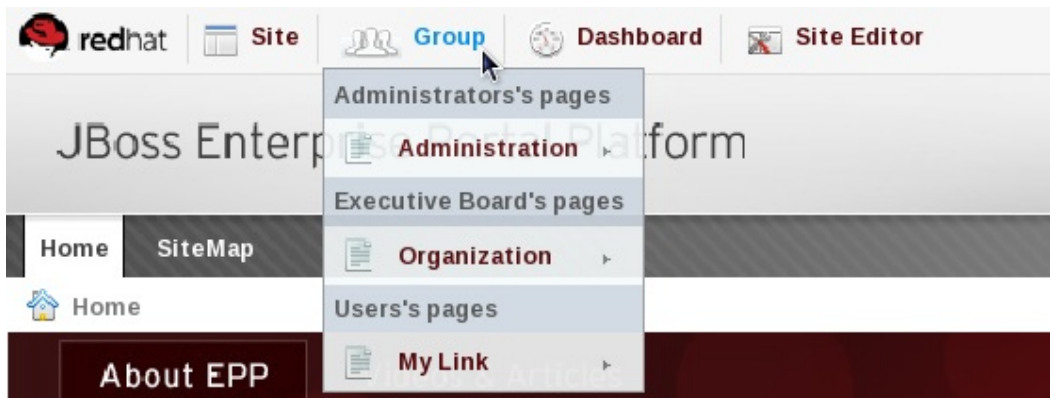
Site

The Site navigation function shows the different sites available in this Portal and allows users to directly edit the navigation tree.



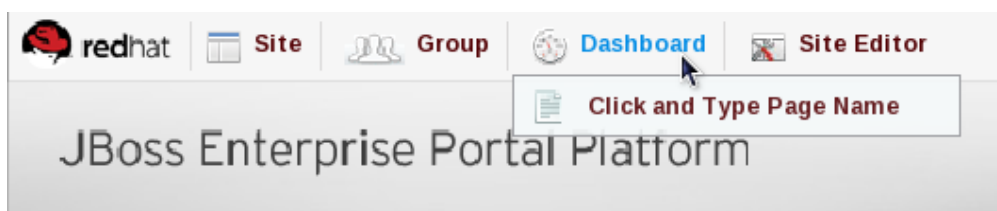
Group

Using the Group navigation function users can easily see and access pages in the Portal.



Dashboard

You can use the Dashboard to create your own pages of gadgets.



The name shown in the image above is the default and can easily be over-typed when the Dashboard is open.

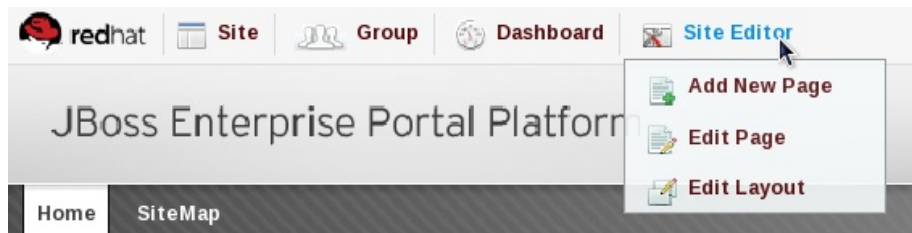
6.1.2. Administration Actions in the Toolbar Editor

Editor

Portal Administrators have access to another navigation that allows them to:

- ▶ Add a new page to the current portal.
- ▶ Edit a particular page's properties.
- ▶ Change a page's layout.

This navigation appears next to the Dashboard navigation in the Toolbar and is contextually-named. It will appear as either **Site Editor**, **Dashboard Editor** or **Group Editor** depending on the user's location within the portal.



6.2. Manage Portals

6.2.1. Create a New Portal

Creating a new portal requires you to have a special permission that only an administrator can give you (if you are not an administrator).

1. Click on **Site** in the toolbar, then click the **Add New Portal** button.
2. This opens the **Create New Portal** window. Initially, the **Portal Setting** tab will be selected. On this tab, specify the following properties of the portal:

Portal Name

Enter the name of the new portal. This field is required and the value must be unique. The name must be between 3 and 30 characters and must begin with an alphabetical character or an underscore. Only alphabetical, numerical, dash and underscore characters are allowed.

Label

Enter a Label for the new portal. This field is optional.

Description

Enter a description of the portal. This field is optional.

Locale

Select the default display language for the portal.

Skin

Select a skin for a portal.

3. Switch to the **Properties** tab and choose values of the following properties:

Keep session alive

This property determines session timeout behavior. Choose one of the following values:

- ▶ *Never* - The session will never timeout, even if an application requests it.
- ▶ *On-demand* - The session will timeout if an application requests it.
- ▶ *Always* - The session will time out after a set period.

Show info bar by default

If checked, portlets added to a page will show an information bar containing their name, a help drop-down menu and minimize/maximize buttons.

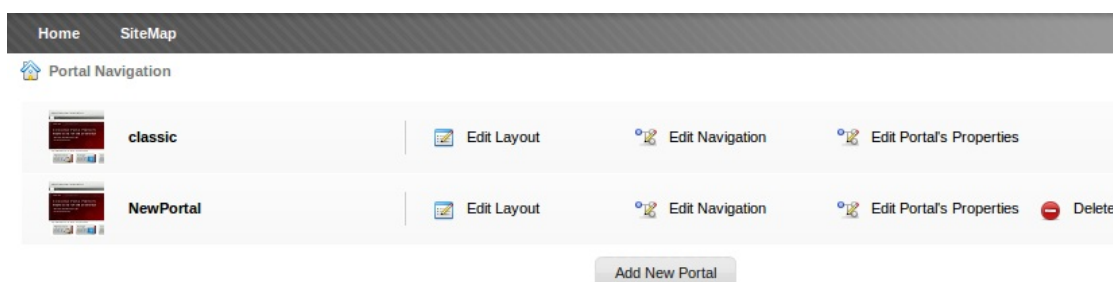
4. Switch to the **Permission Setting** tab and set the permissions for the portal. Two types of permissions need to be set for a new portal; *Access Permission* and *Edit Permission*.
 - ▶ *Access Permission* can be set to allow global access by checking the **Make it Public** box. Alternatively, specific permission for groups can be added by clicking **Add Permission**, then selecting a group in the left pane of the box and then a membership level in the right pane.
 - ▶ *Edit Permission* requires specific permissions to be set. Click on **Select Permission** and choose a group and level as above.
- See [Section 6.5, “Manage Users and Groups”](#) and [Section 6.6, “Manage Permissions”](#) for further information.
5. If you wish to use a template for your portal, switch to the **Portal Templates** tab. This tab lets you choose a template for the new portal from templates that are saved in the installation.
 6. Click **Save** to create the portal.

You can edit or delete the created portal any time later. See [Section 6.2.2, “Access a Portal”](#) or [Section 6.2.6, “Delete a Portal”](#) for more details.

6.2.2. Access a Portal

An administrator can easily access numerous portals running in the JBoss Portal Platform instance.

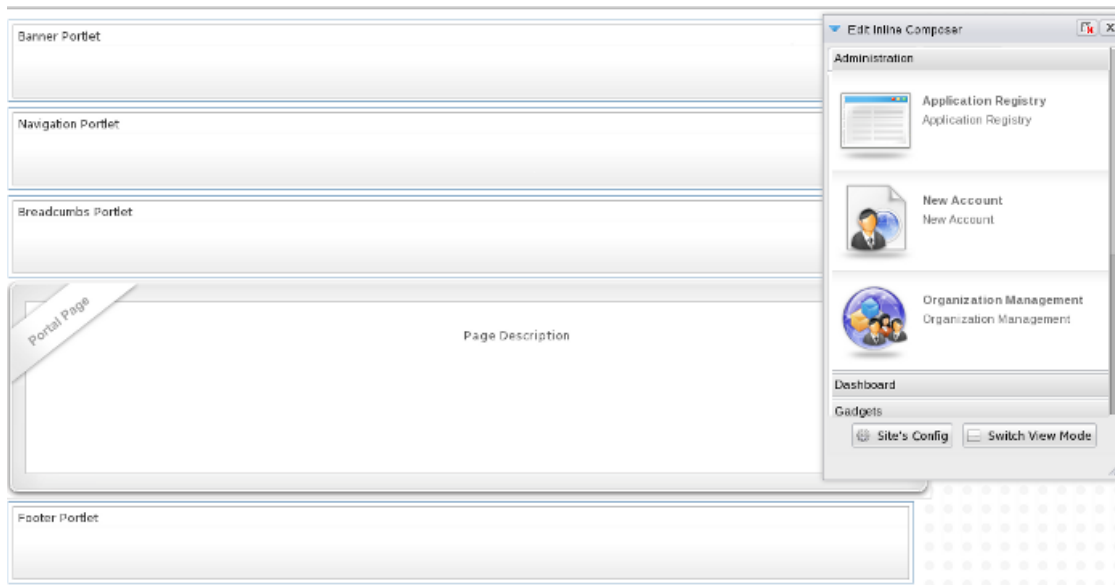
To access a portal, click **Site** on the Toolbar. You will be taken to the Site Management page, which shows a list of portals and possible actions:



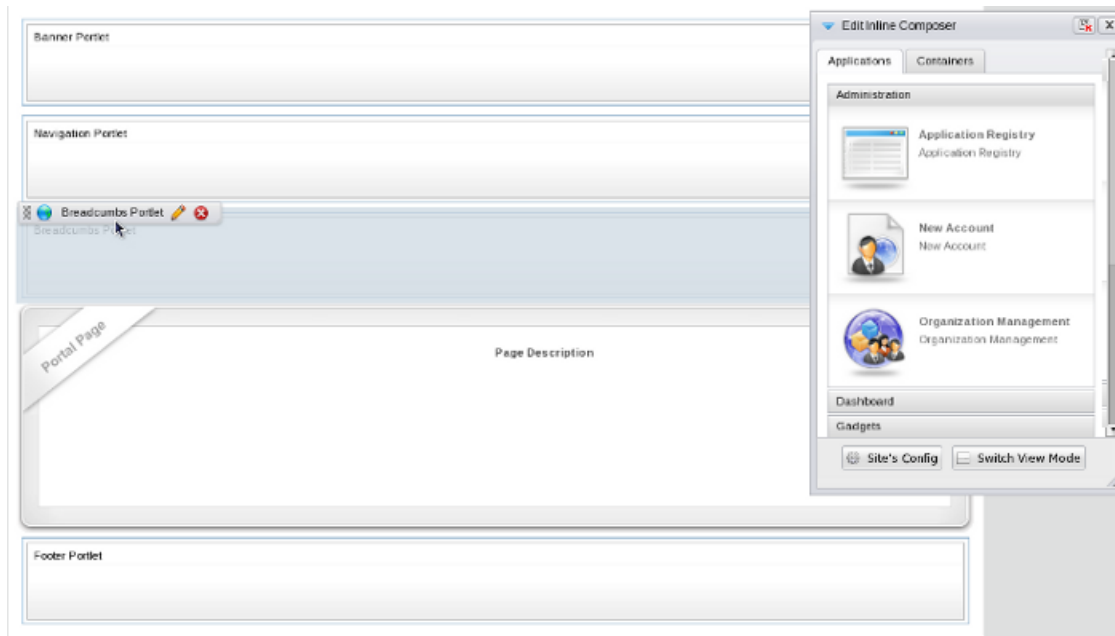
6.2.3. Edit Layout

To edit the layout of a portal, click the *Edit Layout* key beside the active portal you wish to edit:

New applications, containers or gadgets can be dragged from the **Edit Inline Composer** window (inset on the right of the screen) onto the main portal body.



Elements already in place in the portal body can be rearranged or removed as required. Use the relevant button in the overlay that appears when you mouse over each element:



Click the **Finish** or **Abort** buttons on the **Edit Inline Composer** window to save or discard your changes.

Custom Portlets

If you want to include a custom portlet or gadget on a page, you may wish to refer to the *JBoss Portlet Tools User Guide* in the JBoss Developer Studio documentation (http://docs.redhat.com/docs/en-US/JBoss_Developer_Studio/) and/or the **Portlet development** section of the *JBoss Portal Platform Reference Guide* (http://docs.redhat.com/docs/en-US/JBoss_Enterprise_Portal_Platform/) for more information about creating and deploying portlets.

6.2.4. Edit Navigation

The portal navigation can be edited by clicking **Site** in the **Toolbar** and selecting the *Edit Navigation* link next to the portal you wish to edit:

The *Navigation Management* window appears:

More information about actions possible in this window can be found in [Section 6.3, “Manage Navigation Nodes”](#)

6.2.5. Edit Properties

Portal properties such as language, skin and permissions can be set by clicking on **Site** in the **Toolbar** and selecting the **Edit Portal's Config** link for the portal you wish to edit:

The various tabs available in the edit properties window give access to the properties that can be edited for the chosen portal:

Click on **Save** or **Cancel** to either set or discard any changes you have made in the portal.

6.2.6. Delete a Portal

1. To delete a portal click on the Delete icon beside the portal you no longer require.

The confirmation message will appear:

2. Click **OK**

6.2.7. Change Portal Skins

Skins are graphic styles used to provide an attractive user interface. Each skin has its own characteristics with different backgrounds, icons, and other visual elements.

There are two ways to change the portal skin, each offering differing effects on the user experience.

When you set skin using **method one** change is applied to this portal, and every user that accesses this portal will see it in the chosen skin.

When you change skin using **method two**, the skin is set for the logged in user and all portals within the domain will be shown with the chosen skin.

Portal skins set via method two have a higher priority when the portal is rendered.

Method One

1. Click on **Site**, then **Edit Portal's Config**.
2. In the **Portal Setting** tab, select another skin **Skin** list
3. Click **Save** to **Finish**.

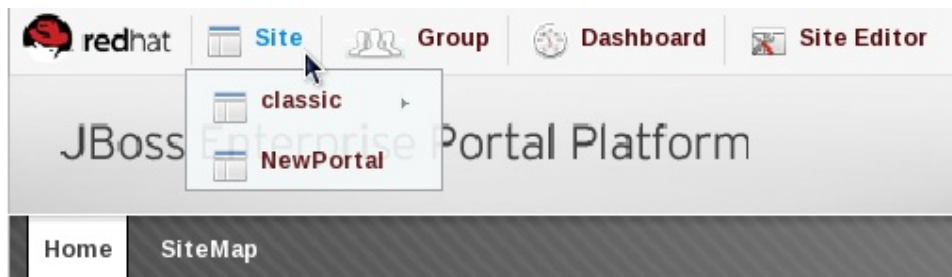
Method Two

1. Mouse over the Start menu and click on **Change Skin**.
2. Select a new skin from the Skin list. By clicking on the skin name a picture will appear in the preview pane.
3. Click **Apply** to apply to the portal.

More information about adding skins to a portal can be found in the [Reference Guide](#) for this product.

6.2.8. Switching between portals

Mouse over **Site** on the Toolbar for a list all portals in which you have at least access rights:



Users switch between portals by clicking on the desired portal. Please wait a few seconds for the change to take effect.

6.2.9. **BZ#794408** Export and Import

You can export and import portals and groups using the controls provided in the **Group+Administration+Site Export/Import** screen.

Exported sites and groups are saved in a zip archive, with the directory structure and XML configuration files preserved exactly as they appear on the source site.

The data included in the XML files includes the following:

portal.xml

Contains the site layout information for the site.

pages.xml

Contains all pages for the site.

navigation.xml

Contains the navigation for the site.

Task: Export Sites or Groups

Follow this procedure to export a site or group using the Export/Import Sites tool.

Prerequisites

- You are logged into the portal with an Administrator account

1. Click **Group+Administration+Site Export/Import** screen.

Result

The Export/Import Sites screen displays.

2. Expand the Sites menu.
3. The portal and group menus display, and contain all the portal types and group types (represented as gear icons) for the instance.
4. Select the portal or group you want to export.

Result

The Export site button becomes available.

5. Click **Export site**.

Result

The site or group selected is exported and saved in your web browser Download directory.

Task: Import Sites or Groups

Follow this procedure to import a site or group using the Export/Import Sites tool.

Prerequisites

- You are logged into the portal with an Administrator account.

1. Click **Group+Administration+Site Export/Import** screen.

Result

The Export/Import Sites screen displays.

2. Click **Import site** to display the Import site dialog.
3. Click **Choose File**, and select a portal or group Zip archive to import.

Result

The selected Zip archive is appended to the Import site screen.

4. Select the Import Mode to apply to the portal or group.

Conserve

Import data only if no artifacts exist. For example, if one page exists for the site 'classic', and you attempt to import a 'classic' site archive, the import will fail.

Insert

Import data when no data exists. If data already exists, the import will fail.

Merge

Import data when no data exists for the site. If data already exists, the site is updated with the differences from the imported archive.

Overwrite

Delete all existing site data for the artifact, and import all data from the archive.

5. Click **Import**

Result

The selected archive is imported, with the import mode behavior applied to the files contained within the Zip.

6.2.10. **BZ#794409** Manage Services

Users with administrator privileges can run service methods and properties directly from the portal interface, using the controls provided in the **Group+Administration+Services Management** interface.

Services Management presents methods and properties organized by the service class name. Controls

in the interface allow users to pass parameters and run commands to call the methods and properties.

Follow [Task: Call a Method in the Services Management Interface](#), and [Task: Call a Property in the Services Management Interface](#), to learn how to call methods and properties related to the **org.exoplatform.portal.application.PortalStatistic** classname. You can adapt the procedures in these tasks to interact with other methods and properties for other portal classes available in the Services Management interface.

Task: Call a Method in the Services Management Interface.

Complete this task to call a method using the Services Management interface, which shows the average portal execution time in seconds.

Prerequisites

- ▶ JBoss Portal Platform is running.
- ▶ You are authenticated with administrator privileges.

1. Click **Group+Administration+Services Management**
2. In the **Services** drop-down, select **portalStatistic**.

Result

The available methods are displayed on the Methods tab, including **getMaxTime**.

3. In the **Parameters** column, type the name of the portal you want to check. For example, if you are running the default portal, type **classic**.
4. In the **Action** column, click **Run**.

5. Result

The **getMaxTime** method is called, and returns the execution time in the value group, underneath the Method table.

Task: Call a Property in the Services Management Interface.

Complete this task to call a property using the Services Management interface, which returns the identifiers of all known portals.

Prerequisites

- ▶ JBoss Portal Platform is running.
- ▶ You are authenticated with administrator privileges.

1. Click **Group+Administration+Services Management**
2. In the **Services** drop-down, select **portalStatistic**.

Result

The available methods are displayed on the Methods tab.

3. Click the Properties tab to display all available properties for the **portalStatistic** Service.

Result

The `Portallist` property displays.

4. In the **Action** column, click **Run**.

5. **Result**

The **Portallist** property is called, and returns the name of all known portals, underneath the Properties table.

6.3. Manage Navigation Nodes

If you are the portal administrator (or the administrator has granted you the appropriate permission privileges) you can execute all actions related to portal nodes. These actions include adding new nodes or editing, copying, moving, deleting or cloning existing nodes.

6.3.1. Add a new node

1. Click on **Site** then click on **Edit Navigation** of the portal you want to modify.
2. Select a node from list (to create a new node like sub-node of the selected node) or click the **Up** icon to create a new node at the root level of the portal.
3. Right-click on the selected navigation or node and select **Add Node** option. The **ADD/EDIT PAGE NODE** form appears:

The **Page Node Setting** tab includes:

Uri

An identification of the node. The Uri is automatically created after adding a new node

Node name

The name of the node. This field is required and must be unique. Only alpha, digit, dash and underscore characters are allowed for this field and it must be between 3 and 30 characters.

Extended label mode

This is a new feature which allows Administrators to add labels to nodes in multiple supported languages. When the language of the site is changed, the nodes will display the appropriate localized label.

Language

Set the language for the node.

Label

The display name of the node on the screen. This field is not required and may be changed. This field must have a length between 3 and 120 characters.

Visible

This check box allows administrators to hide (and show) the page and its node at the navigation bar, the page navigation and the site map

Publication date & time

This option allows publishing this node for a period of time. *Start Publication Date* and *End Publication Date* only appear when this option is selected.

Start Publication Date

The start date and time to publish the node.

End Publication Date

The end date and time to publish the node.

In the **Page Selector** tab, you can select a page or not for this node.

Page Id

The identification string of the page.

Name

The selected page's name.

Title

The selected page's title.

You do not have to enter values in these fields. They are automatically populated after selecting an existing page by clicking the **Search and Select Page** button.

The **Select Page** form appears:

This window lists all existing pages of **Portal** or **Group** with basic information for each page.



To select a page for creating a node, simply select a page from the list or search for a specific page as follows:

- a. Enter your page title into the **Title** field to do search to Title;

Page Id	Title	Access Permission	Type	Action
group::/platform/guests::sitemap	Site Map	[*/platform/guests]	*/platform/administrators	✓
group::/organization/managerem	New Staff	[*/organization/management/ex	manager:/organization/managem	✓
group::/platform/administrators::	New Account	[manager:/platform/administrator	manager:/platform/administrator:	✓
group::/platform/users::mylink-bl	Blog	[*/platform/users]	*/platform/administrators	✓
group::/platform/guests::link	Link	[*/platform/guests]	*/platform/administrators	✓
group::/organization/managerem	Organization Management	[*/organization/management/ex	manager:/organization/managem	✓
group::/platform/administrators::	Community Management	[manager:/platform/administrator	manager:/platform/administrator:	✓
group::/platform/users::mylink-re	Red Hat	[*/platform/users]	*/platform/administrators	✓
group::/platform/administrators::	Registry	[manager:/platform/administrator	manager:/platform/administrator:	✓

Or, enter the site name into the **Site Name** field to do search to the page's site name;

Or, enter values into both fields to further limit your search results by both **Title** and **Site Name**.

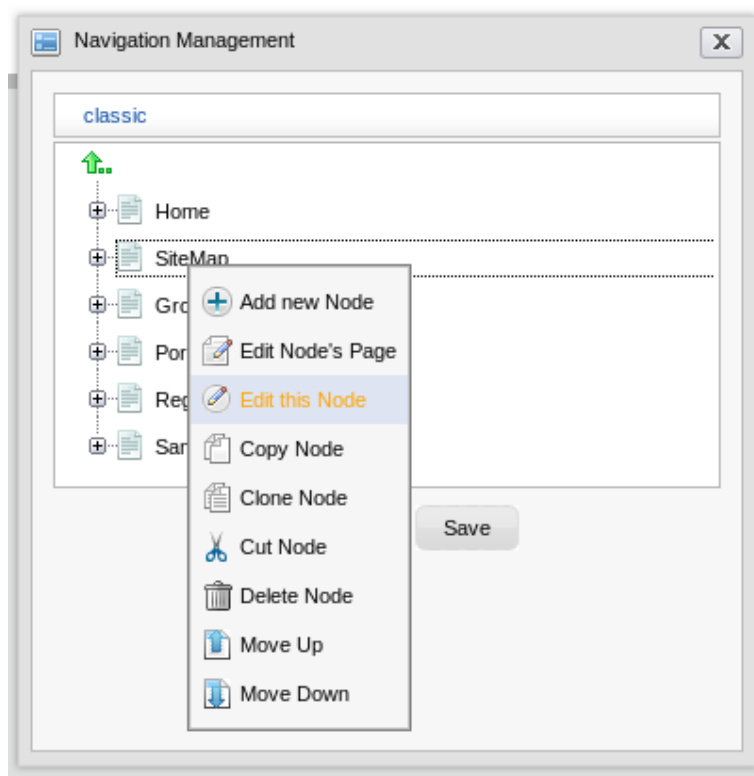
- b. Select the area in which you wish to search into the **Type** field.
- c. Click  to perform your search. All pages matching your search criteria will be listed.
- d. Click  on the row of the page you wish to select.

After selecting a page, the details of this page will be displayed in the **Page Selector** form.

After configuring the page node settings, the page selector and the node's icon, click the **Save** button to accept or the **Cancel** button to quit without creating a new node.

6.3.2. Edit a node

1. Click **Site**, then click **Edit Navigation** of the portal you want to modify.
2. Right-click on the selected node and select **Edit this Node** option.



This will display a form to edit this node.

3. In the **Page Node Setting** tab you can change the value of these fields:
 - ▶ Extended label node
 - ▶ Language
 - ▶ Label
 - ▶ Visible
 - ▶ Publication Date & time
4. After you finish making the desired changes, click the **Save** button to accept changes or **Cancel** button to exit without change.
5. In the **Page Selector** tab you can also search and select another page for this node by clicking the **Search and Select Page** button.

You can see more details on how to select a page for a node in [Section 6.3.1, "Add a new node"](#).

After you finish edit any another page required for this node, click the **Save** button to accept changing or **Cancel** button to leave without saving any changes.

6.3.3. Copy a node

1. Click on **Site** then click on **Edit Navigation** of the portal you want to modify.
2. Right-click on the selected node and select **Copy node** option.
3. Select the position that you want to paste this node and select **Paste Node** option.

6.3.4. Clone nodes

The **Clone node** function allows you to copy a node.

The differences between **clone node** and **copy node** is that the clone node has its own page and which has the same content as the selected node.

Therefore there will be a new page that has the same name as the cloned node's page shown in the page list when you access **Manage Pages**.

1. Click on **Site** then click on **Edit Navigation** of the portal you want to modify.
2. Right-click on selected node and select **Clone node** option.
3. Select the position that you want to paste this node and select **Paste Node** option.

6.3.5. Cut a node

1. Click on **Site** then click on **Edit Navigation** of the portal you want to modify.
2. Right-click on the selected node and select **Cut node** option.
3. Select the position that you want to paste this node and select **Paste Node** option. mark icon to **Save**.

6.3.6. Delete a node

1. Click on **Site** then click on **Edit Navigation** of the portal you want to modify.
2. Right-click on the selected node and select **Delete node** option.
It will display an alert message confirming the removal of the node. Click the **OK** button to accept the deletion or **Cancel** button to quit without deleting the node.

6.3.7. Change Node Order

You can easily change the position of nodes in the navigation bar following these steps:

1. Click on **Site** then click on **Edit Navigation** of the portal you want to modify.
2. Select the node that you want to move. Right click on the selected node and then click on **Move up** or **Move down**
3. The selected node will be moved up or down within the list.

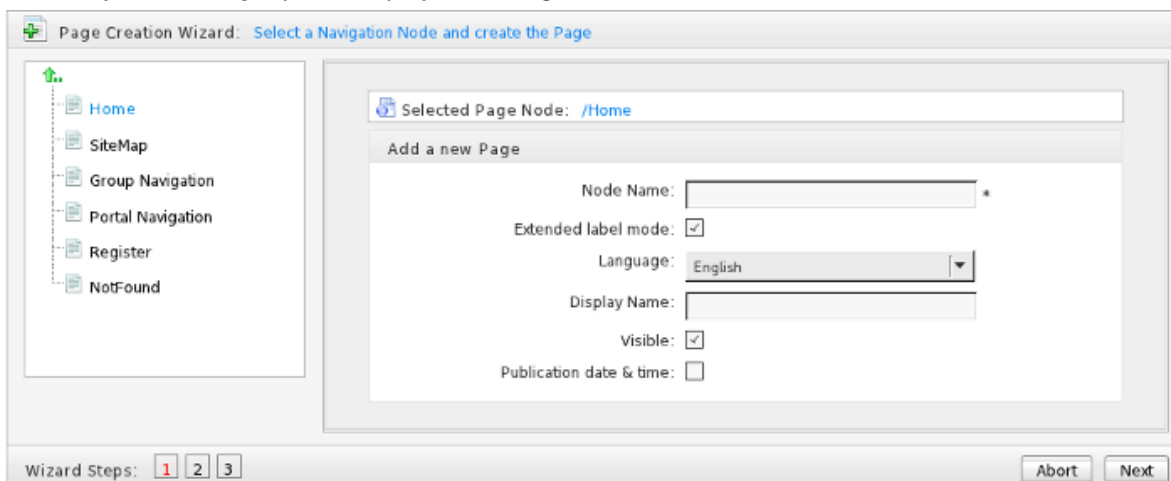
6.4. Manage Pages

6.4.1. Adding a new Page

6.4.1.1. Adding a new Page using Page Creation Wizard

A page creation wizard is available to administrators in order to create and publish portal pages quickly and easily.

1. Mouse over **Site Editor** then select **Add New Page**.
2. The wizard window is divided into two sections: the left pane contains the existing page/node hierarchy and the right pane displays the **Page Editor**.



In the left pane, you can navigate up and down the node/page structure.

In the right pane are the required parameters for a new page.

3. **Current Selected Page Node**

The path of the selected node to add a new sub page

Node Name

The node name of the added page. It is required field. This field must start with a character and must have a length between 3 and 30 characters.

Extended label mode

This is a new feature which allows Administrators to add labels to pages in multiple supported languages. When the language of the site is changed, the pages will display the appropriate localized label.

Language

Set the language for the page.

Display Name

The display name of the node which contains the added page and must have a length between 3 and 30 characters.

Visible

This checkbox toggles the global visibility of this page.

If checked the page or the page node appears on the navigation bar, the page navigation and the site map. If "visible" is checked the visibility depends on the "publication date & time" attribute.

If unchecked, the page is not shown in the site map or navigation bar.



Non-visible Pages and Security

The **Visible** checkbox should **not** be used as a security measure, as **non-visible pages will still be accessible using a direct URL**, such as <http://localhost:8080/portal/private/classic/pagename>.

Publication date & time

This option allows publishing the page for a period of time. If this option is checked the visibility of the page depends on the publication period start and end date.



Publication Dates and Security

The **Publication Date & Time** functionality should **not** be used as a security measure, as pages configured for time-specific publication **will always be accessible using a direct URL** regardless of publication dates.

Start Publication Date

The start date and time to publish the page. **This field is only visible if the *Publication date & time* box is checked.**

End Publication Date

The end date and time to publish the page. **This field is only visible if the *Publication date & time* box is checked.**



Setting Time and Date

You can set date and time by clicking the **Start Publication Date** field and **End Publication Date** field and select a date in the calendar pop up.

4. Click **Next** or number '2' of the wizard steps to go to step 2.
5. Select **Empty Layout** or click the drop-down arrow at the top of the right pane to see more templates to select.
6. Click the **Next** button or number '3' of the wizard step to go to step 3. You can drag portlets from the pop-up panel into the main pane to create the content of this page.

Applications

Allows listing all existing portlets

Containers

Allows listing all existing containers

View Page properties

Allows reviewing or changing various page settings (**title**, **Page ID** and more) and/or page permissions.

Switch View mode

Allows viewing a page in preview mode

7. You can click on the **Switch View mode** button to view the content of this page. You can switch between viewing the page by layout (showing containers and portlets) or to preview how the page will look when live. The contents of the page can be edited in either mode.
8. Once you have configured the new page, use the icons located in the top right corner of the **Page Editor** window to navigate as required:
Click **Back** (the small left-facing arrow) to return the previous step, **Save** (the small disk icon) to create the new page or **Abort** (the small cross) to quit without creating a new page.

6.4.1.2. Adding a new Page using Page Management

1. Mouse over **Group** in the Toolbar, highlight **Administration** then select **Page Management**.
2. Click on **Add New Page**.
3. The fields in this window are:

Page Id

A string that identifies the page. It is automatically generated when you finish creating the page.

Owner type

If the page **Owner type** is set to *portal* the page is created with shared ownership portal. Therefore users who have *edit* permissions on the *portal* level can edit this page type.

If the page **Owner type** is *group* the page is created for a group. Therefore users who have *manager* permissions for that *group* can edit this page type.

Owner Id

The name of the current portal is automatically selected for **Owner id** ensuring the edit permissions are assigned to users who can edit the current portal.

When the owner type is set to *group*, a list of groups will allow you to select one user as the 'owner'.

Page Name

The name of the page. This is a required field and must be unique. Only alphabetical, numerical, dash and underscore characters are allowed to be used for this field and the name must be at least 3 and no more than 30 characters in length.

Page title

The title of the page. This is an optional field. If you choose to add a title to the page it

must be at least 3 and no more than 120 characters in length.

Show Max Window

The option allows users to choose whether the page is shown at maximum size or not.

4. Click **Save**.

6.4.2. Edit a Page

1. Mouse over **Group** in the Toolbar. Highlight **Administration** and then click on **Page Management**.
2. Click the edit icon on the row of page you want to edit in the existing page list.
Click View Page properties icon to show a form to edit page properties.
3. The properties presented in the **Page Properties** window are the same as those outlined in [Section 6.4.1.2, "Adding a new Page using Page Management"](#).

Permission Setting

Permission on each page is set in two levels: **Access right** and **Edit right**.

Access right

Access right can be set to specific user groups or set to everyone (this includes unregistered users).

Current access permissions on page are listed in **Access Permission Setting** tab and you can remove permissions (by clicking the **delete** icon) or add further permission (by clicking the **Add Permission** button).

Populating the **Make it public** check box will allow all users (registered or unregistered) to access the page.

Edit right

The **Edit right** allows users to change information on a page. **Edit right** only is set for a group of users.

Edit right can be set for one specific membership type within a particular group (* allows every membership type in a group). If you want to re-assign this right to another group, click **Select Permission** in **Edit Permission Setting** tab to choose another one.

6.4.3. Delete a Page

1. Mouse over **Group** in the Toolbar. Highlight **Administration** and then click on **Page Management**. You will be presented with a list of all existing pages.
2. Click the trash can icon in the row of the page you want to delete. It will display the confirmation message.
3. Click the **OK** button to complete the deletion or **Cancel** button to quit without deleting the page.

6.4.4. Drag and Drop the Page Body

To assist administrators to modify or personalize their portal JBoss Portal Platform allows you to easily drag and drop page content within the page.

1. Mouse over **Site Editor** in the toolbar and click on **Edit Layout**.
2. Click on the **Portal Page**, drag and drop within the portal page.

6.4.5. Captcha

You can set whether Captcha is used to verify a user is an actual person. The Captcha behavior is set in the Register Account portlet by default.

Task: Disable "Register New Account" Captcha Behavior

Complete this task to control how Captcha behaves when a user registers an account.

Prerequisites

- ▶ You are logged into the portal using an account with Administrator privileges.

1. Click **Group+Administration+Page Management** to display a page containing the .
2. Click the **Edit Page** icon in the Action column for the portal::classic::register Page ID.
3. Click on the Register Account portlet, and then click the Edit Portal icon (pencil icon) to open portlet properties.

**Note**

Click the **Switch View mode** button in the Page Editor control to switch between WYSIWYG and Object mode.

4. Click the Edit Mode tab (if not already selected), and clear the **Use captcha** box to disable Captcha verification for new users.
5. Click Save, and then click Close to commit the changes.
6. In the Page Editor control, click Switch View mode to refresh the portlet.

7. Result

The Register New Account portlet will no longer display the Captcha field.

6.5. Manage Users and Groups

Several tools are offered to assist Administrators manage users, groups and memberships easily and effectively.

6.5.1. Roles

Effective user management in JBoss Portal Platform relies on an understanding of the rights and responsibilities of the various user roles available.

Core Portal Memberships

- ▶ Member
- ▶ Manager
- ▶ Validator

Table 6.1. Role Attributes of Example Users

User	Roles
root	manager:/platform/administrators,member:/platform/users,member:/organization/management/executive-board
john	member:/platform/administrators,member:/platform/users,manager:/organization/management/executive-board
mary	member:/platform/users
demo	member:/platform/guests,member:/platform/users

Roles

manager:/platform/administrators

This role is for users to have access and edit administrators pages. Examples are the New Account, Community Management, Registry, Page Management, New Staff, Organization Management and WSRP Admin pages.

member:/platform/administrators

This role is similar to the manager role above. The main difference is that it does not have access to the administrators pages, but can access and edit everything that falls under the ***/platform/administrators** pages.

***/platform/administrators**

This role has edit permissions for everything. This includes; the Home Page, Group Navigation, Portal Navigation, Register and Site Map (in the *classic* portal). This membership also has permission to create and manage portals and has full permission with group navigation.

member:/platform/users

This role allows standard users to log in.

***/platform/users**

This role has access to portal toolbars, dashboard, default gadgets (todo, rss, calculator and calendar) and basic portlets (sitemap and iframe). In general it can access but cannot edit these areas.

member:/organization/management/executive-board

This role can edit New Staff and Organization Management pages. **DOCS NOTE: I didn't see it in our EPP**

member:/platform/guests

Members of this role can access the Register and Site Map pages.

***/platform/web-contributors**

This role can edit the Contact Us page, has taxonomies permission to read, add nodes, set and remove properties in *acme*, *classic* and *events* and is the newsletter marketing moderator, general moderator and subscription redactor. They have access to the **ManageDrivePlugin** for Collaboration and Events. This role also has access to toolbars.

***/platform/administrators**

This role grants access to the edit mode drop-down in toolbar visible (**WCAdminToolbarPortlet**)

validator:*

This role is not used. It can be removed if it is present in your instance.

Mandatory groups (groups that can not be deleted)

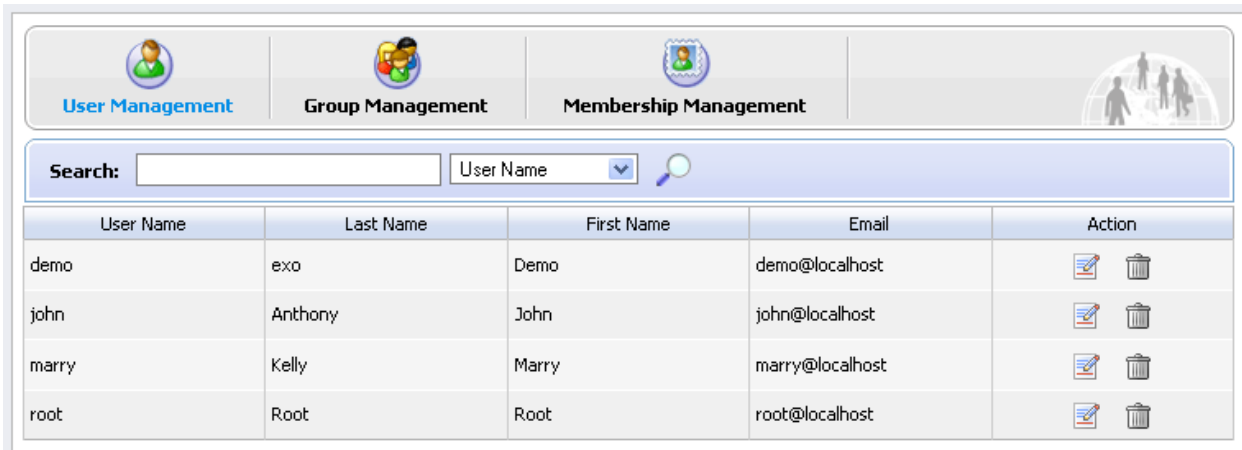
- ▶ /platform/administrators
- ▶ /platform/users
- ▶ /platform/guests









Mandatory membership types (Membership type that can not be deleted)

- ▶ member

6.5.2. Manage users

Mouse over **Group** in the Toolbar. Highlight **Organization** and select **Users and Groups Management**



User Name	Last Name	First Name	Email	Action
demo	exo	Demo	demo@localhost	 
john	Anthony	John	john@localhost	 
marry	Kelly	Marry	marry@localhost	 
root	Root	Root	root@localhost	 

Administrators can see all existing registered users and search, edit or even delete them. Each user's groups and memberships (roles) in these groups are also available.

6.5.2.1. Add a user

To add a new user to the portal user lists follow these steps:

1. Mouse over **Group** in the **Toolbar**.
2. Highlight **Organization** and then click on **New Staff**.
The **New Staff** window will open:
This window has two tabs; **Account Setting** and **User Profile**.
3. To create a new user, all fields on the **Account Settings** tab that are marked with an asterisk must be filled in. The **Display Name** field is optional and when left blank, a value in format *<First Name> <Last Name>* is used.
Further information about the user (such as nickname and birthday) can be added in the **User Profile** tab. This information is not required for the creation of the account.
4. Click either **Save** or **Reset** to create or discard the new account.

6.5.2.2. Search for users

The Administrator can search for specific users by username, first name, last name or email address.

1. Mouse over **Group** in the Toolbar. Highlight **Organization** and select **Users and Groups Management**.
2. Select the information type (name, email, etc) to search against
3. Type in a partial/full string which identifies the user record being searched. The * character can be used as a wild-card.
4. Click the magnifying glass icon to begin the search.

6.5.2.3. Edit a user

1. Locate the user you wish to edit.
2. Click the edit icon (next to the trash icon).
3. Select the **Account Info** tab to edit the main user information set including first name, last name or email address.

User Name

The **User Name** field cannot be changed. Other fields — **First Name**, **Last Name**, **Display Name** and **Email Address** — can be changed.

Change Password

The **Change Password** option allows an administrator to set a new password for a user. When the **Change Password** option is unchecked, **New Password** and **Confirm Password** are hidden. Passwords must contain between 6 and 30 characters.

4. Select the **User Profile** tab to edit additional information about the user's profile such as the birthdate or the job title as well as some home and business metadata. You may also switch the default display language for that user.
5. Select the **User Membership** tab to see a user's group membership information.

User Membership

The **User Membership** tab displays which group(s) the selected user belongs to. In the above figure, the user "demo" is a member of two groups: "guests" and "users". The parent group of both is "platform".

To remove the user from a group, click the trash can icon.

6. Click the **Save**.

6.5.2.4. Delete a user

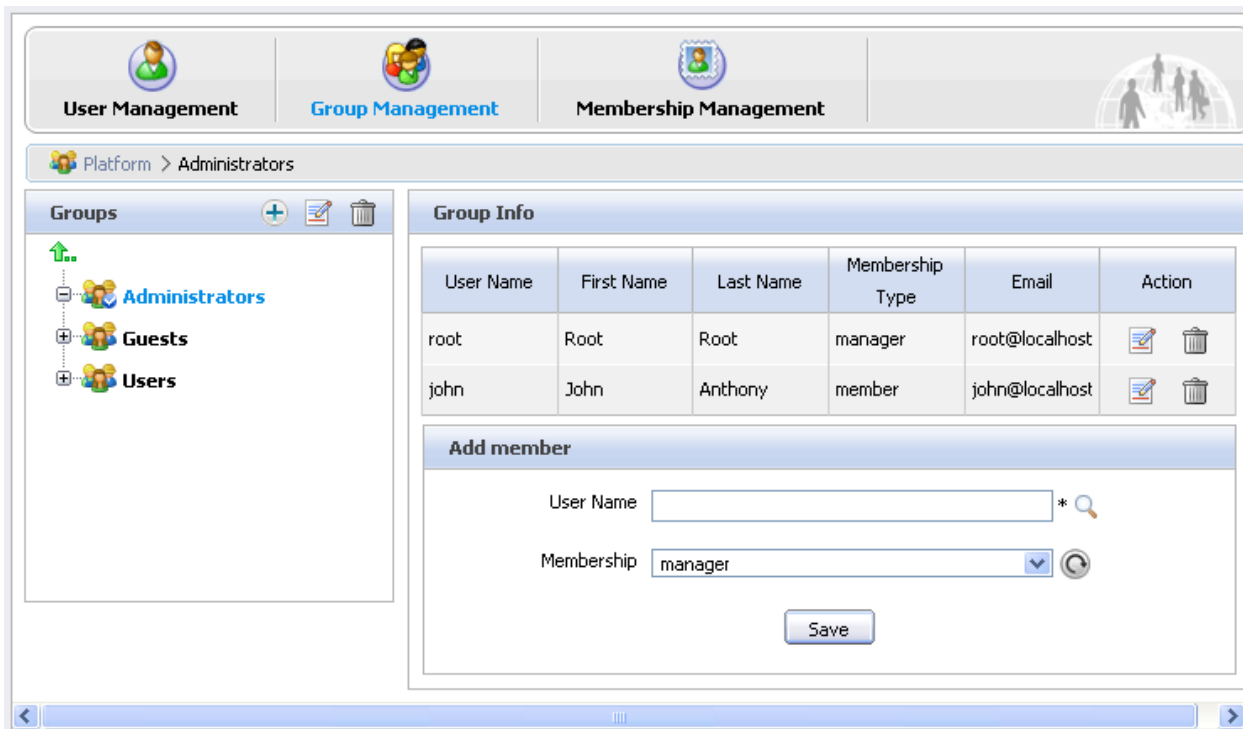
1. Locate the user you wish to delete
Click the trash icon in the Action column
2. Click **OK** to confirm.

6.5.3. Manage groups

Mouse over **Group** on the Toolbar. Highlight **Organization** and select **Users and Groups Management**

Select the tab **Group Management**

By default, all existing groups will be displayed on the left pane. This tab is used to add new, edit or delete a group. The right pane shows information about the selected group including information about the members in the specific group along with a small form to add a new user to a group.



6.5.3.1. Add a New Group

1. First choose where in the existing group structure you want the new group to be created. You may navigate up the tree by clicking on the green vertical little arrow at the top of the tree. The current path is displayed in the path bar.
2. Click **Add New Group**.

Group Name

The name of the new group. This field is required and any length from 3 to 30 characters is allowed. Once saved this name cannot be edited.

Label

The display name of the group. Any length from 3 to 30 characters is allowed.

Description

A description of the group. Any length from 0 to 255 characters is allowed.

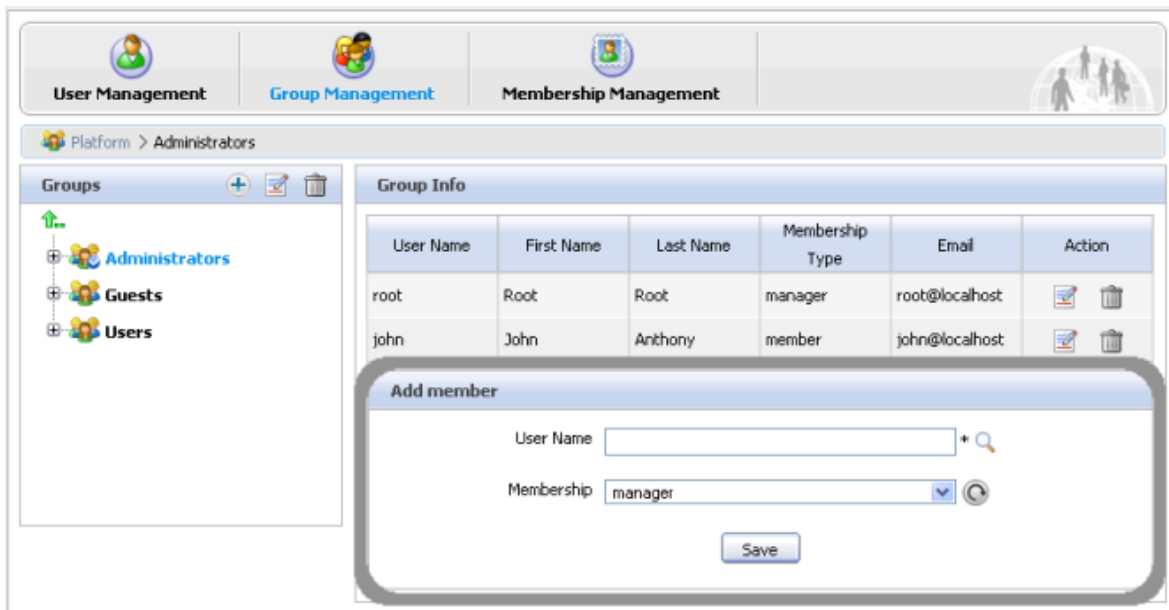
3. Fill in the required fields. Only letters, numbers, dash and underscore characters are allowed for the **Group Name** field. The name must be unique within the portal.
4. Click **Save**

6.5.3.2. Edit a group

1. Find the group in the existing tree and click on the label
2. Click the edit icon to display the **Edit Selected Group** window.
3. Make the desired changes in the appropriate fields. You can not change the Group Name, however you may change to the **Label** field. You are also able to edit the **Description** field.
4. Click **Save**

6.5.3.3. Add a new user to a group

1. Find the group in the existing tree and click on its label. Existing group memberships are listed on the right hand side along with the **Add Member** window.



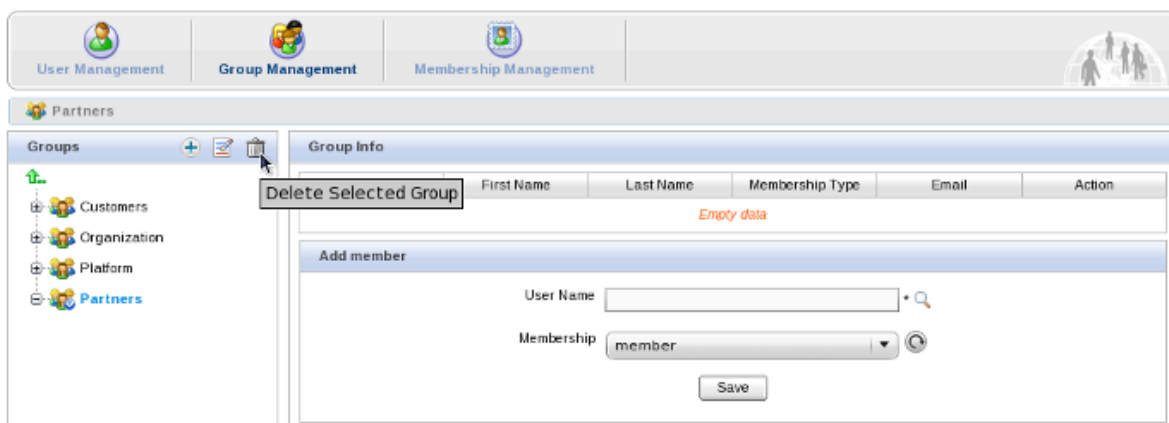
- Click on the magnify glass to open up the User selector.
Refer to [Section 6.5.2.2, “Search for users”](#) for instructions on how to locate a user.
Check the box next to the user name then click **Add**
- Select the membership appropriate for this user. If the desired membership does not appear you may try to click on the refresh icon to get the latest list.
- Click **Save**

6.5.3.4. Edit the user membership in a group

- Click the edit icon in the Action column.
- Select another membership.
- Click **Save**.

6.5.3.5. Delete a group

- Find the group in the tree
- Click the trash icon.



- Click **OK**.

6.5.4. Manage memberships

The role of a user in a specific group is managed using memberships.

By default three membership types are available: *Manager*, *Member* and *Validator*. By definition, Manager has got the highest rights in a group.

Mouse over **Group** on the Toolbar. Highlight **Organization** and select **Users and Groups**

Management. Select the **Membership Management** tab.

This tab remembers the last action taken by a user in this page. Clicking **Reset** will clear any legacy details.

Membership name	Created date	Modified date	Description	Action
manager	10:27:56 2009-04-01	10:27:56 2009-04-01	manager membership type	
member	10:27:56 2009-04-01	10:27:56 2009-04-01	member membership type	
validator	10:27:56 2009-04-01	10:27:56 2009-04-01	validator membership type	

Add/Edit Membership

Membership name *

Description

6.5.4.1. Add a new membership type

1. In the **Add/Edit Membership** form, enter the values for the membership name field (required) and the description field (optional). Only letters, digits, dots, dashes and underscores are allowed for the membership name and it must be between 3 and 30 characters.
2. Click the **Save**

6.5.4.2. Edit a membership type

1. Click the edit icon in the Action column.
2. Make the desired changes to the description.
3. Click **Save**

6.5.4.3. Delete a membership type

1. Click the trash icon in the Action column.
2. Click **OK**

6.6. Manage Permissions

Permissions play an important part in accessing and performing actions in the Portal. Depending on these permissions assigned by an administrator, users gain access to various components and actions such as edit portals, pages or portlets.

Details about permission types and levels can be found in [Section 3.8, "Permissions"](#)

6.6.1. Set Portal Permissions

New portals

Click on **Site** on the **Toolbar**, then click on **Add New Portal** → **Permission Setting**

Existing portals

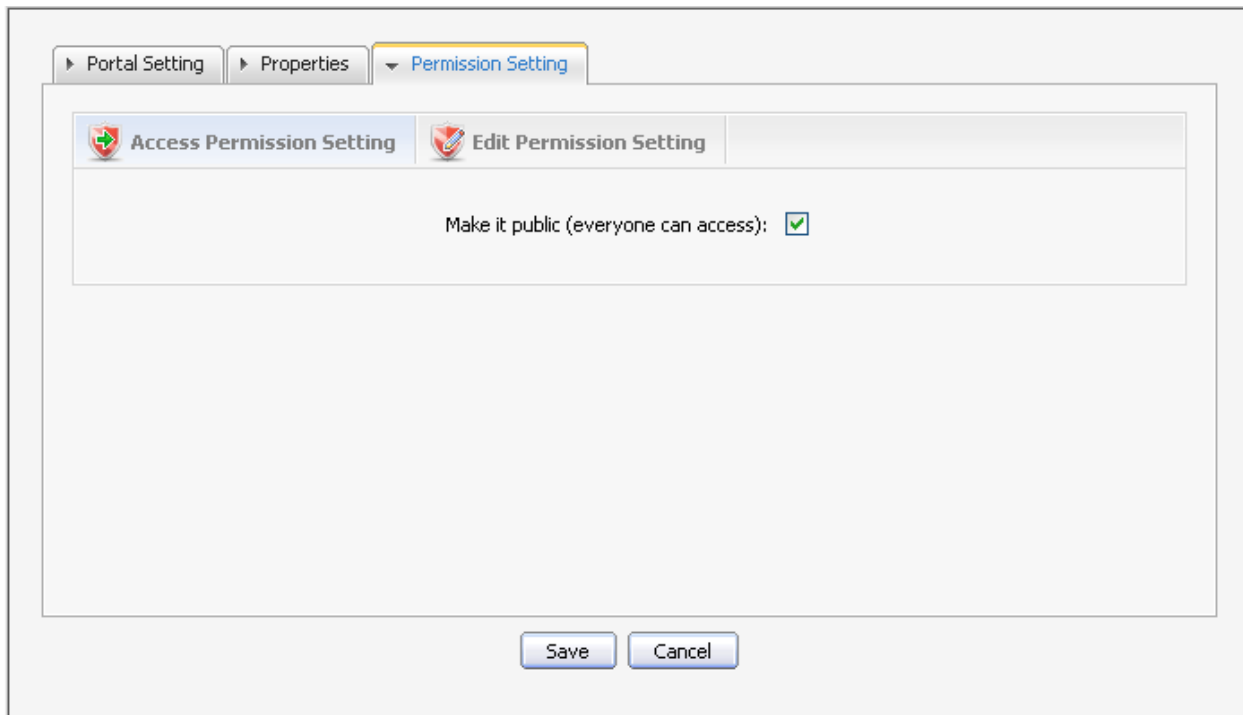
On the Toolbar click **Site** then **Edit Portal's Config**. Then select the **Permission Setting**

tab.

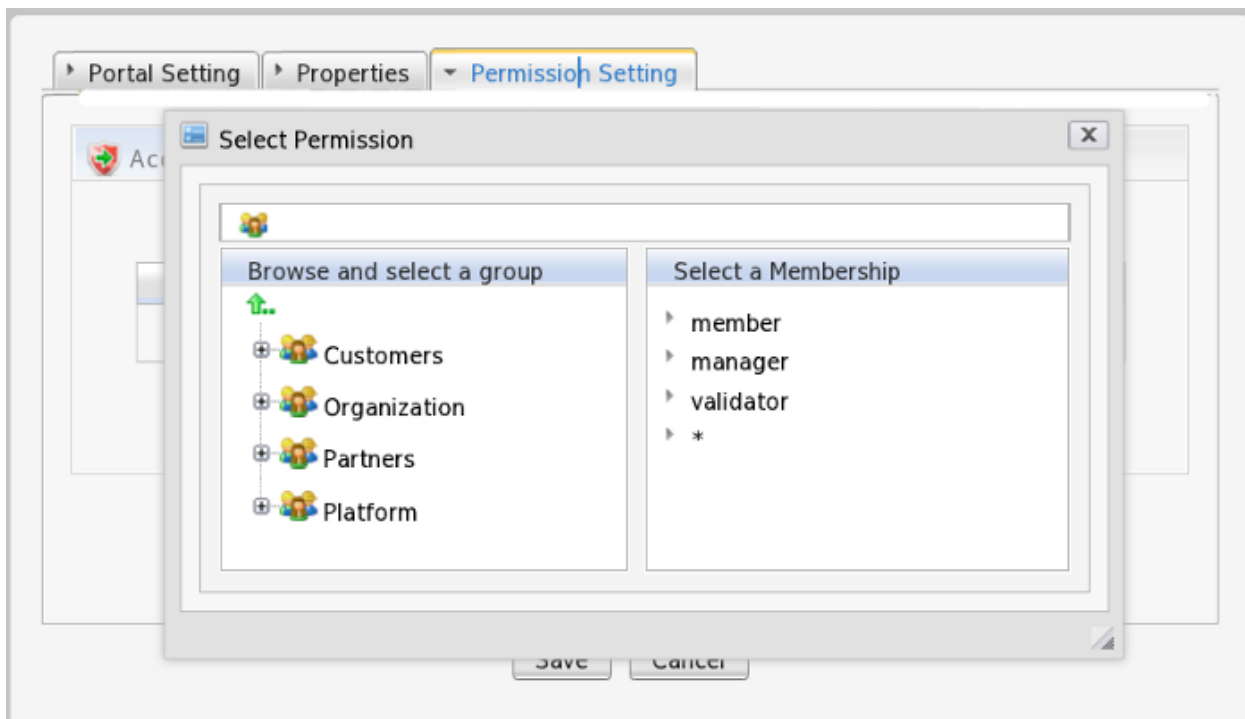
6.6.1.1. Set Access permissions

Public access

If you do not want your Portal to be publicly accessible, make sure the **Make it public** check box is clear.



If **Make it public** is clear, you need to add permissions by member group.



1. Click **Add Permission**
2. Make the appropriate selections from the group and membership options presented in the **Select**

Permission dialogue box.

3. After selecting a membership type, the selected permission is displayed in the access permission list. You can only select one group with one membership type at a time. If you want to add more, click **Add Permission** and select again. Repeat the process for as many permission settings as you require.

6.6.1.2. Set Edit Permissions

Only members of the Editor group can edit that portal. Access rights can be given to several groups but edit rights can only be given to a group with a membership type. To assign an edit permission to a user, you must add him/her to the editor group of the respective portal.

1. Click **Edit Permission Setting**
2. Click **Select Permission** to choose a group.
3. Select a group and a membership type from the left and right panes, respectively, of the **Permission Selector** window (select * if you want to assign all available membership types to the selected group).

6.6.2. Set Page Permission Group

If the Owner type of a page is "group", initial permissions on page are:

- ▶ Access permission: everyone in that group.
- ▶ Edit permission: the manager of that group.

Portal

If the Owner type of a page is portal, initial permissions are:

- ▶ Access permission: users who can access that portal.
- ▶ Edit permission: users who can edit that portal.

6.6.2.1. Set Access Permission on a Page

1. Open up the page you wish to configure. Select **Site Editor** on the Toolbar and select **Edit Page**.
2. Click **View Page Properties** in the **Page Editor**.
3. Click the **Permission Setting** tab.

To be able to access a page users have to be in one of the groups that have access permission to that page. There may be several groups that have access rights to a page. A list of the permissions for that page will be shown (provided the **Make it public** check-box has not been used).

4. Click **Add Permission**
5. Select a group in the left pane then select a membership type.
6. After selecting a membership type, the selected permission is displayed in the access right list. Note that you may associate group and membership only one at a time. To add more access permissions, click the **Add Permission** button and apply the same process again.

If you want to allow any visitors to access the page tick the **Make it public** check-box. Any permission set for that page will be relaxed and the permissions list will disappear.

6.6.2.2. Set Edit Permission on a Page

Only users who are in the page's editor group can edit it. The access right can be set for several groups but the edit right only can be set for one group. To give a user the edit permission, you must add them to

the editors group of that page.

The Permission Setting tab is available in two different ways:

Procedure 6.1. Via Edit Page:

1. Mouse over **Site Editor** on the Toolbar and select **Edit Page**.
2. Click on **View Page Properties** in the **Page Editor**.
3. Click the **Permission Setting** tab then the **Edit Permission Setting** sub tab.

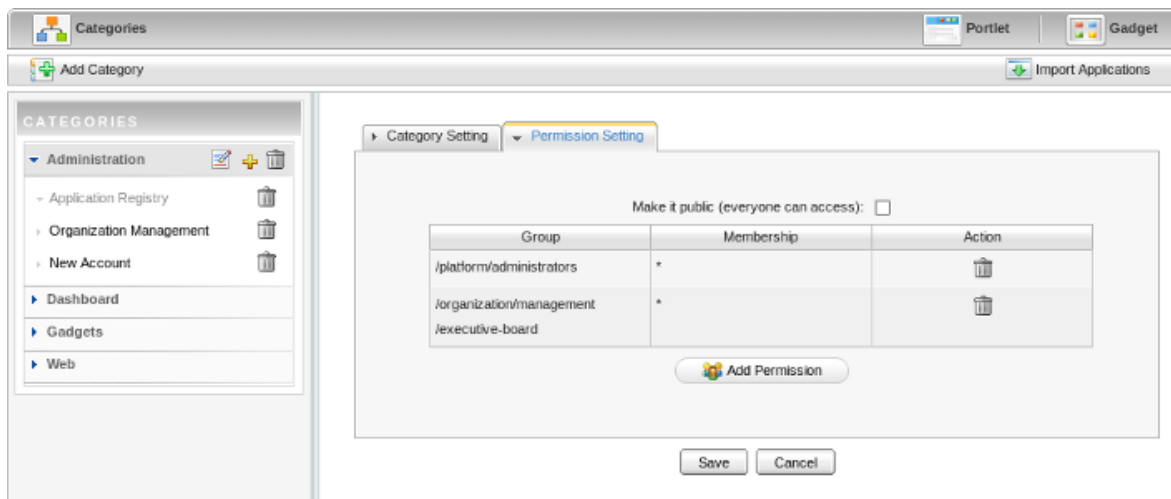
Procedure 6.2. Via Page Management:

1. Mouse over **Group** on the Toolbar, highlight **Administration** and click on **Page Management**.
2. Locate the page you want to edit using the **Page Id** column then click the edit icon (next to the trash icon). You will be taken to the **Page Editor**.
3. Click on **View Page Properties** in the **Page Editor**.
4. Click on the **Permission Setting** tab then the **Edit Permission Setting** sub tab.
You will see the **Current Permission** listed.
5. Click the **Select Permission** button to set new or change another group.
6. Select a group with a membership type (select * if you want all membership types in a selected group)
7. After selecting a specific membership from the right, the selected information is displayed.
8. Click the **Save**

6.6.3. Set Access Permission on a Category

Setting access permission on a category allows to be able to list those categories when editing a page in order to add portlets or gadgets.

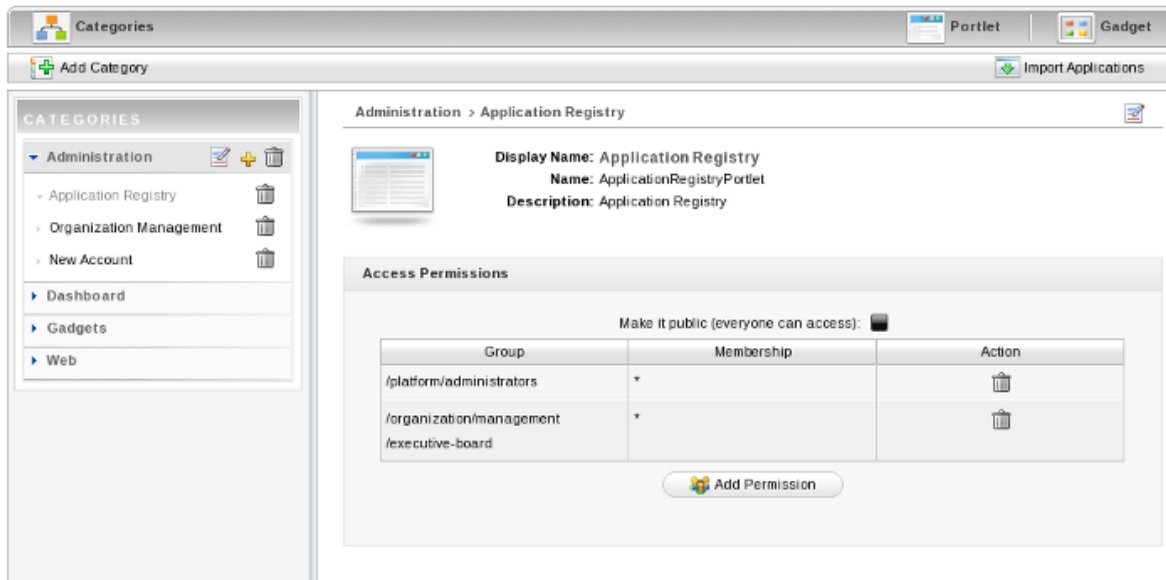
1. Mouse over **Group** on the Toolbar, highlight **Administration** then click on **Application Registry**.
2. In the list of categories available in the left pane, click the edit icon, then choose the **Permission Setting** tab.



3. To set permissions for a category:
 - a. Click the **Add Permission** button to add access permissions to more groups.
 - b. Or select the **Make it public** check box to allow everyone to access.

6.6.4. Set Access Permission on a Portlet

1. Select **Group** on the Toolbar. Highlight the **Administration** entry and click on **Application Registry**.



2. Select a category on the left pane that includes the portlet you want to set rights for. Then all portlets of the selected category are listed immediately and detail information of each portlet is displayed on the right pane.
3. To set permissions for a portlet:
 - a. Click the **Add Permission** button to add access permissions to more groups .
 - b. Or select the **Make it public** check box to allow everyone to access.

Chapter 7. Language administration

7.1. Change Interface Language

JBoss Portal Platform allows users to pick the language of the user interface.

The priority of the interface language setting follows this hierarchy:

1. User's language
2. Browser's language
3. Portal's language

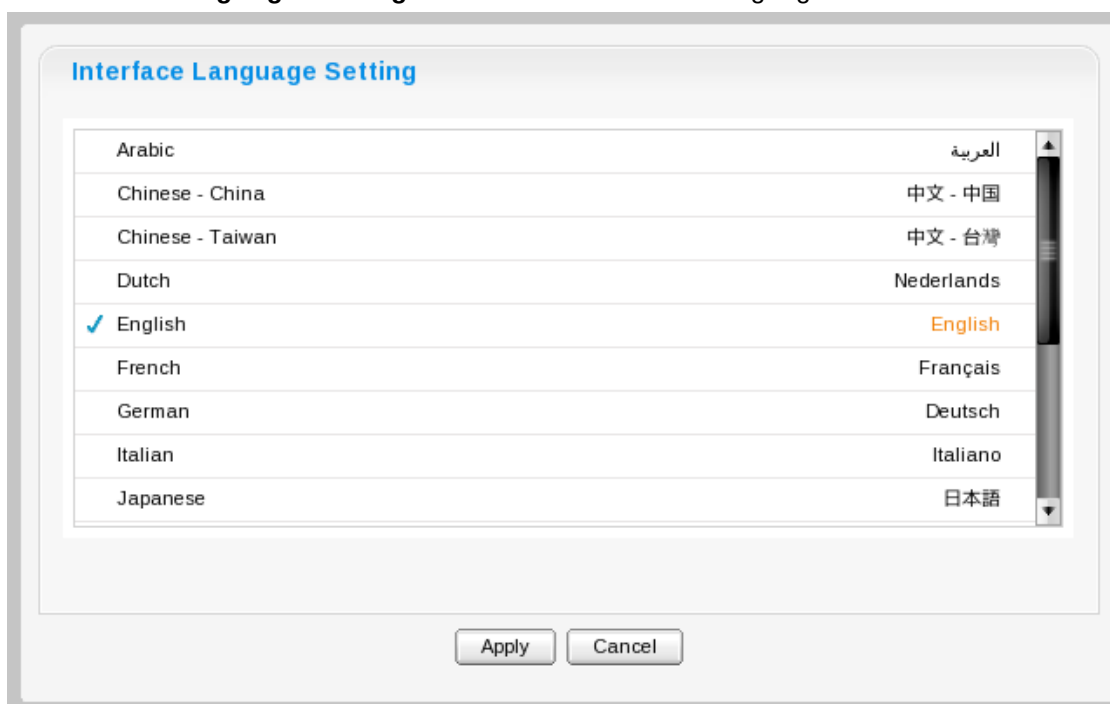
Note that users should pay attention to this order in order to change the language type appropriately.

You may switch the interface language in various places as follows:

7.1.1. Language for a user

You may set the interface language for your account alone and not for the entire Portal as follows:

1. Open up the Start menu and click on **Change Language** :
2. The **Interface Language Setting** window lists all available languages installed in the Portal:



3. Click on the desired language. The associated native word is highlighted.
4. Click **Apply** to save your change. The site should refresh and display its attributes in the language you've just chosen.

7.1.2. Set language for a user

There are two modes to set the interface language for a specific user.

Public Mode

When accessing the portal in **Public Mode**, the interface language is dictated by the language setting of your web browser.

If you have set the language of your browser to one that JBoss Portal Platform does not support, the displaying language will be the language set at the Portal level (see above).

Private Mode

The interface language in **Private Mode** is set when registering each user. See step four of the process to register a new account [Section 5.1, “Register New Accounts”](#).

7.2. Right To Left Support

JBoss Portal Platform supports Right to Left (RTL) languages.

7.3. Multi-Language Navigation Nodes

JBoss Portal Platform supports a multi-language environment for your portal allowing you to internationalize any menu entry on the navigation.

As the navigation bar is composed of nodes, you have to modify the display names of the nodes to enable this. Instead of entering the display name of the node in a defined language (English, for example) you have to use a language-neutral 'resource key'.

This resource key is then used to define the label that is shown for that node on the navigation bar, the menu and the breadcrumb.



Extended Label Mode

A localization feature called Extended Label Mode has been available in JBoss Enterprise Portal Platform as of version 5.2.0. This feature allows site administrators to add labels to nodes and pages in multiple supported languages. When the language of the site is changed, the nodes will display the appropriate localized label.

7.3.1. Key Format

The resource key format is: **#{key}**

The resource key can contain any text that you consider appropriate to satisfy your business needs. It should, however, be human-readable and must not contain spaces.

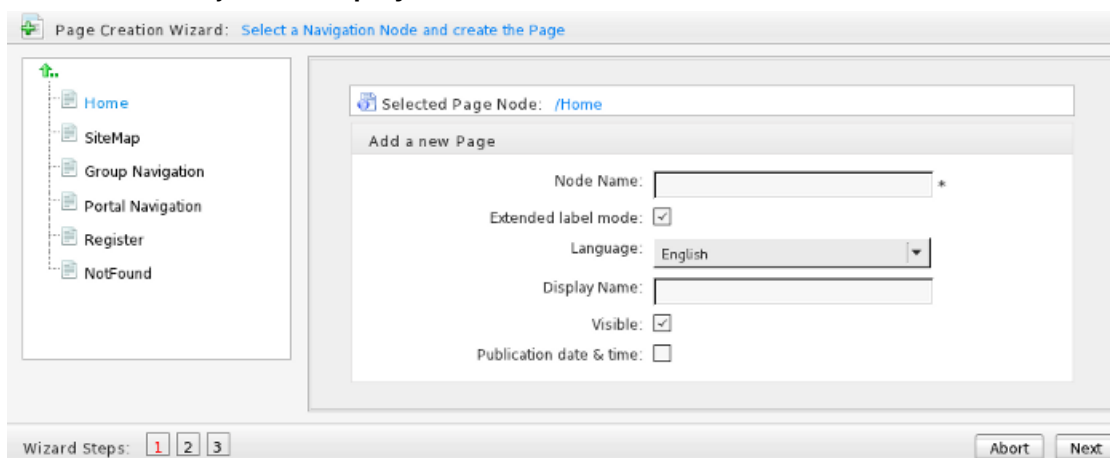
7.3.2. Creating Keys

There are two ways to create a key for a node:

1. [Section 7.3.3, “Creating Keys using Create Page Wizard”](#)
2. [Section 7.3.4, “Creating/Editing Keys using Navigation Management”](#)

7.3.3. Creating Keys using Create Page Wizard

1. Open the **Site Editor** menu and pick **Add New Page**.
2. Enter a name for this new page
3. Enter a resource key in the **Display Name** field.



4. Click **Next**. On the next screen you may define a page layout out of existing templates.
5. Click **Next** to finalize the page creation with portlets for instance.

7.3.4. Creating/Editing Keys using Navigation Management

1. Click on **Site** in the Toolbar then **Edit Navigation**
2. Click on **Add Node**
3. The Create/Edit node dialog appears. Enter a resource key in the **Label** field



Reusing Keys

You can reuse the same resource key in several nodes.

7.3.5. Providing translation

To provide a translation for the resource key used as page name, resource bundles must be provided within the web archive.

Property files (or XML resource bundles) must be located in: `/jboss-as/server/<PROFILE>/deploy/gatein.ear/02portal.war/WEB-INF/classes/locale/navigation/portal/<PORTAL_NAME>_<LANGUAGE_CODE>.properties`

Chapter 8. Portlets and Gadgets Administration

8.1. Import Portlets and Gadgets

This feature imports portlets/gadgets found in web applications on your server



Note

The Application Registry looks in all webapps of your application server for a file located at WEB-INF/portlet.xml and registers the portlets found there. When the user clicks on "Auto Import" the portlets of all webapps are imported. If there is a portlet.xml file in a webapp a new category is created whose name is the webapp war name (or the webapp folder name). All the portlets that are configured in the portlet.xml file are added to the new category.

1. In the **Group** menu, select **Administration** then **Application Registry**:
2. Click **Import Applications** on the right hand side. A confirmation message will appear.
3. Click **OK** to accept.

8.2. Manage Portlets and Gadgets

Portlets and gadgets are organized in different categories. Each category contains one or several portlets or gadgets. You can also mix portlets and gadgets into one category. By default all gadgets are placed in the *Gadgets* category.



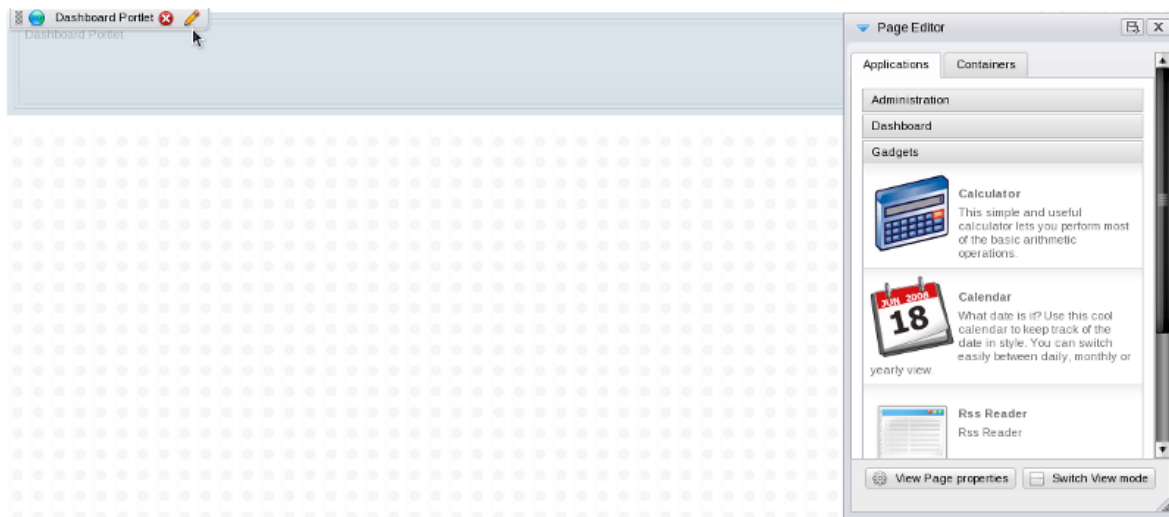
Gadget Preference Persistence

Administrators and users should be aware that adding a gadget to any portal page other than the dashboard, will result in any user set preferences or modifications (adding entries to the TODO gadget, for example) **not** being saved in a persistent manner. This limitation will be corrected in a later version of JBoss Portal Platform.

8.2.1. Display Gadgets

You can change the number of columns available in the Dashboard.

1. Go to the Dashboard (by clicking **Dashboard** in the Toolbar)
2. Hover over **Dashboard Editor** and click **Edit Page** in the drop-down menu.
3. The Page editor will appear.
4. Hover over the **Dashboard Portlet** and click on the **Edit** icon (the 'pencil').



5. Change the number of columns in the **Number of columns** field. The maximum number of columns is four (4).
6. Click the **Save** button to accept the change.
7. Click **Close** and then click **Finish**.

8.2.2. Add a new Category

You easily add a new category by following this guide:

1. Hover over the **Group** menu, then **Administration** and click on **Application Registry**.
2. Click the **Add Category** button on the action bar:

The **Category Setting** tab: includes common information about a category.

Category name

The name of the category. This field is required and its length must be between 3 and 30 characters. Only alpha, digit, dash and underscore characters are allowed.

Display name

The display name of the category and its length must be between 3 and 30 characters.

Description

A brief description of the category. Any length from 0 to 255 characters is allowed.

The **Permission Setting** tab provides access to the Permission manager.

The permission criteria are used whenever a user creates or modifies a page. In that case the user can only see and use portlets in those categories on which he or she has access to (as defined by groups and memberships).

8.2.3. Edit a Category

1. Click the Edit icon located next to the title bar.
2. Update the category information.
3. Click the **Save** button to apply changes.

8.2.4. Delete a Category

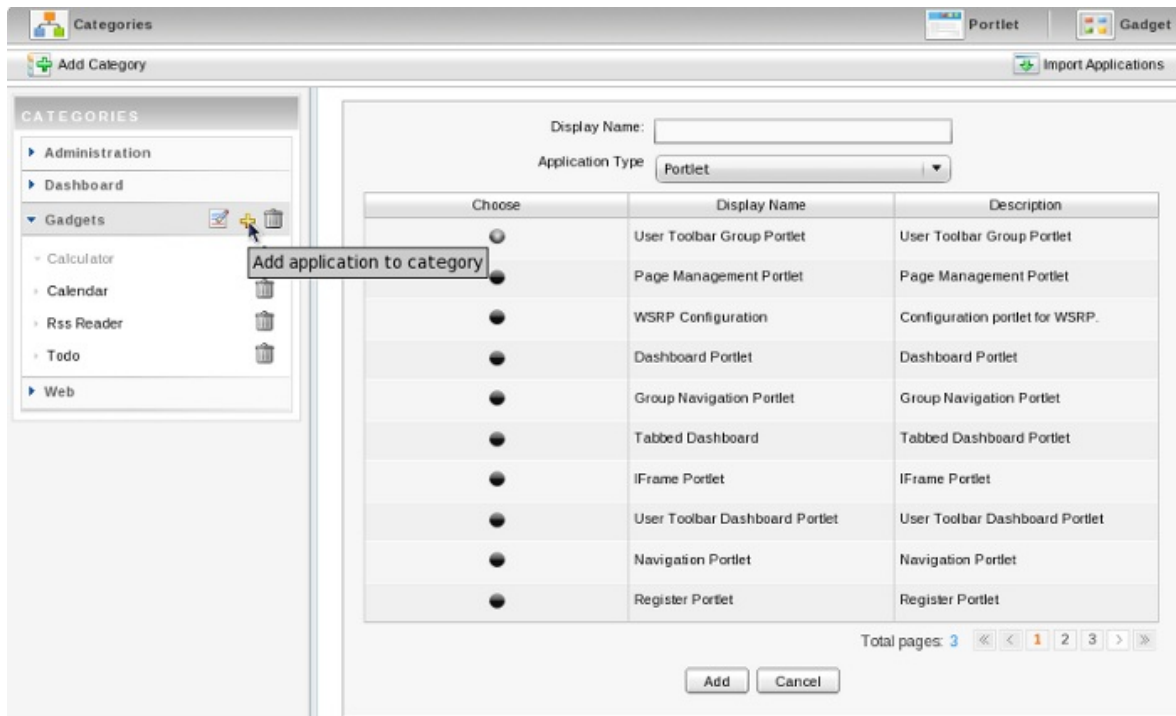
1. Click the Trash can icon located next to the title bar.
2. Accept the deletion by clicking **OK**

8.2.5. Add Applications to a Category

1. Click the "Plus" icon located next to the category (in the list on the left) to which you want to add

an application.

The image below shows the available application. You will see this list when you click the "Plus" icon.



Display name

The display name of a portlet/gadget.

Application Type

Either Portlet, Gadget or WSRP application.

2. Enter the display name and select a type
3. Select an application by checking the radio button. Note that there several pages of Portlet applications to choose from and that the content of the list changes when you select a different type of application from the **Application Type** drop-down menu.
4. Click the **Save** button to add the selected application to the category.

8.2.6. Set Access Permission on Portlets

1. In the **Group** menu, select **Administration** and then **Application Registry**.
2. Select a category in the Category pane that includes the portlet you want to set permissions on. All portlets of that category will be listed underneath.
3. To set permission for a portlet:
 - ▶ Click the **Add Permission** button to add access permissions to more groups.
 - ▶ Or check **Make it public** to allow everyone to access.

Whenever the user creates or modifies a page, he or she can only see and use gadgets/portlets that fulfill two conditions: the portlet is in a **category** which the user has access permission too and the user has access permission on the **portlet**

8.2.7. View/Edit portlet/gadget information

In the **Group** menu, select **Administration** then **Application Registry**.

Left pane

All portlets and gadgets grouped by categories

Right pane

shows detail information about a portlet: Name, Display name, Description and Portlet preferences.

To see the details of any portlet select it from the list on the left.

To edit a portlet, click the edit button to the right of the portlet's name:

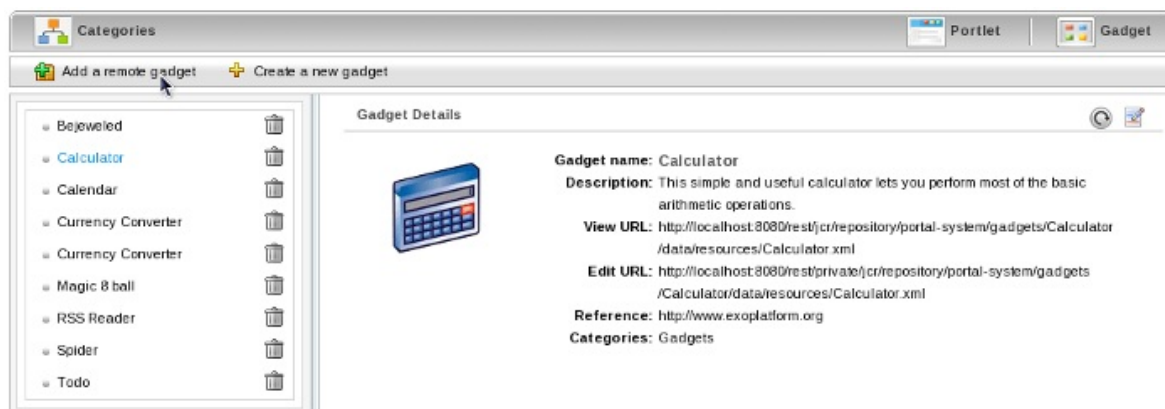
8.2.8. Add a Gadget

In the **Group** menu, select **Administration** then **Application Registry**. Click on the **Gadget** icon.

You may add a remote gadget using its URL or create a brand-new one:

Procedure 8.1. Add a Remote Gadget

1. Click on **Add a remote gadget**:



2. Enter the url of the remote gadget in the **URL** field.
3. Click **Add**. The new remote gadget will be appear in gadget list on left pane.

Procedure 8.2. Create a new Gadget

1. Click on **Create a new gadget**:
2. Populate the **Source** field with the xml code of the new gadget.

8.2.9. Add a new Gadget to the Dashboard Portlet

See [Section 4.3.2, "Add Gadgets"](#) for instructions on how to add new gadgets to the dashboard.

8.2.10. Manage Gadgets

You can edit or refresh a gadget using the icons in the top right of the **Gadget Details** pane.

You can delete a local gadget using the trashcan icon to the right of the appropriate gadget in the gadget list.

8.2.10.1. Edit a Gadget

Click the **Edit Gadget** icon located in the header of the **Gadget Details** page to display the following window:

Name:

Source:

```
<Module>
<ModulePrefs title="RSS Reader" title_url="http://www.exoplatform.com" directory_title="RSS Reader"
  description="RSS Reader"
  thumbnail="/exoGadgets/skin/DefaultSkin/portlet/cons/rssAggregator.png">
<Require feature="dynamic-height" />
<Require feature="setprefs"/>
<Require feature="settitle"/>
<Locale lang="ar" language_direction="rtl"/>
</ModulePrefs>
  <UserPref name="rssurl" display_name="FEED URL" default_value="http://feeds.feedburner.com/gatein"
  required="true" />
  <UserPref name="num_entries" display_name="# of Items (1-100)" default_value="10"/>
<Content type="html"><![CDATA[
<link rel="stylesheet" type="text/css" href="style.css"></link>

<script type="text/javascript" src="script.js"></script>
<div id="feedContainer" style="height:229px;overflow:auto;"></div>
```

Chapter 9. Further Documentation

Further documentation about using and configuring the JBoss Portal Platform can be found in the JBoss Portal Platform Installation Guide or the JBoss Portal Platform Reference Guide which are hosted at www.redhat.com.

Revision History

Revision 6.0.0-8	Mon Nov 12 2012	Petr Penicka
Minor edits of work done in BZ#813776.		
Revision 6.0.0-7	Mon Nov 8 2012	Petr Penicka
BZ#813776 - removed various screenshots with no added information value and fixed various minor errors identified by docs QE.		
Revision 6.0.0-6	Tue Oct 30 2012	Jared Morgan
Rebuilt book so it would appear under the JBoss Portal Platform banner, and standardized subtitle across all books.		
Revision 6.0.0-4	Wed Oct 17 2012	Scott Mumford
BZ#856442: Removed numerous unnecessary images.		
Revision 6.0.0-3	Wed Oct 10 2012	Petr Penicka
Implemented changes required in BZ#849806.		
Revision 6.0.0-2	Fri Sep 12 2012	Petr Penicka
Implemented changes required in BZ#794408.		