

# JBoss Portal 2.4

## User Guide

Release 2.4 "Devil"

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# JBoss Portal - Overview



Many IT organizations look to achieve a competitive advantage for the enterprise by improving business productivity and reducing costs. Today's top enterprises are realizing this goal by deploying enterprise portals within their IT infrastructure. Enterprise portals simplify access to information by providing a single source of interaction with corporate information. Although today's packaged portal frameworks help enterprises launch portals more quickly, only JBoss Portal can deliver the benefits of a zero-cost open source license combined with a flexible and scalable underlying platform.

JBoss Portal provides an open source and standards-based environment for hosting and serving a portal's Web interface, publishing and managing its content, and customizing its experience. It is entirely standards-based and supports the JSR-168 portlet specification, which allows you to easily plug-in standards-compliant portlets to meet your specific portal needs. JBoss Portal is available through the business-friendly LGPL [http://www.jboss.com/company/aboutopensource] open source license and is supported by JBoss Inc. Professional Support and Consulting [http://www.jboss.com/services/index] . JBoss support services are available to assist you in designing, developing, deploying, and ultimately managing your portal environment. JBoss Portal is currently developed by JBoss, Inc. developers, Novell developers, and community contributors.

The JBoss Portal framework and architecture includes the portal container and supports a wide range of features including standard portlets, single sign-on, clustering and internationalization. Portal themes and layouts are configurable. Fine-grained security administration down to portlet permissions rounds out the security model. JBoss Portal includes a rich content management system and message board support.

**JBoss Portal Resources:**

1. JBoss Portal Home Page [<http://www.jboss.org/products/jbossportal>]
2. Forums:    User    [<http://www.jboss.org/index.html?module=bb&op=viewforum&f=215>]    |    Developer  
              [<http://www.jboss.org/index.html?module=bb&op=viewforum&f=205>]    |    WSRP  
              [<http://jboss.org/index.html?module=bb&op=viewforum&f=232>]    |    Eclipse    Portlet    Plugin  
              [<http://jboss.org/index.html?module=bb&op=viewforum&f=239>]
3. Wiki [<http://www.jboss.com/wiki/Wiki.jsp?page=JBossPortal>]
4. PortletSwap.com portlet exchange [<http://www.portletswap.com>]
5. Our    Roadmap  
      [<http://jira.jboss.com/jira/browse/JBPORTAL?report=com.atlassian.jira.plugin.system.project:roadmap-panel>]

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# Feature List

The following list details features found in this document's related release. For a technical view of our features, view the Project Roadmap and Task List [<http://jira.jboss.com/jira/browse/JBPORTAL>] .

## Technology and Architecture

- **JEMS:** Leverages the power of JBoss Enterprise Middleware Services : JBoss Application Server, JBoss Cache, JGroups, and Hibernate.
- **DB Agnostic:** Will work with any RDBMS supported by Hibernate
- **SSO/LDAP:** Leverages Tomcat and JBoss single sign on (SSO) solutions.
- **JAAS Authentication:** Custom authentication via JAAS login modules.
- **Cacheing:** Utilizes render-view caching for improved performance.
- **Clusterable:** Cluster support allows for portal state to be clustered for all portal instances.
- **Hot-Deployment:** Leverages JBoss dynamic auto deployment features.
- **SAR Installer:** Browser-based installer makes installation and initial configuration a breeze.

## Supported Standards

- **Portlet Specification and API 1.0 (JSR-168)**
- **Content Repository for Java Technology API (JSR-170)**
- **Java Server Faces 1.2 (JSR-252)**
- **Java Management Extension (JMX) 1.2**
- **Full J2EE 1.4 compliance when used with JBoss AS**

## Portal and Portal Container

- **Multiple Portal Instances:** Ability to have multiple Portal instances running inside of one Portal container.
- **IPC™** Inter-Portlet Communication API enables portlets to create links to other objects such as a page, portal or window .
- **Dynamicity™** The ability for administrators and users to create and destroy objects such as portlets, pages, portals, themes, and layouts at runtime.
- **Internationalization:** Ability to use internationalization resource files for every portlet.
- **Pluggable services:** Authentication performed by the servlet container and JAAS make it possible to swap the authentication scheme.

- **Page-based Architecture:** Allows for the grouping/division of portlets on a per-page basis.
- **Existing Framework support:** Portlets utilizing Struts, Spring MVC, Sun JSF-RI, AJAX, or MyFaces are supported.

### Themes and Layouts

- **Easily swappable themes/layouts:** New themes and layouts containing images can be deployed in WAR archives.
- **Flexible API:** Theme and Layout API are designed to separate the business layer from the presentation layer.
- **Per-page layout strategy:** Different layouts can be assigned to different pages.

### User and Group Functionality

- **User registration/validation:** Configurable registration parameters allow for user email validation before activation.
- **User login:** Makes use of servlet container authentication.
- **Create/Edit Users:** Ability for administrators to create/edit user profiles.
- **Create/Edit Roles:** Ability for administrators create/edit roles.
- **Role Assignment:** Ability for administrators to assign users to roles.

### Permissions Management

- **Extendable permissions API:** Allows custom portlets permissions based on role definition.
- **Administrative interface:** Allows for permissions assignments to roles at any time for any deployed portlet, page, or portal instance.

### Content Management System

- **JCR-compliant:** The CMS is powered by Apache Jackrabbit, an open source implementation of the Java Content Repository API.
- **DB or Filesystem store support:** Configurable content store to either a filesystem or RDBMS.
- **External Blob Support:** Configurable content store allowing large blobs to reside on filesystem and content node references/properties to reside in RDBMS.
- **Versioning support:** All content edited/created is autoversioned with a history of edits that can be viewed at any time.
- **Content Serving Search-engine-friendly URLs:** <http://yourdomain/portal/content/index.html> (Does not apply to portlet actions.)

- **No long portal URLs:** Serve binaries with simple urls. (<http://domain/files/products.pdf>)
- **Multiple HTML Portlet instance support:** Allows for extra instances of static content from the CMS to be served under separate windows.
- **Directory Support:** create, move, delete, copy, and upload entire directory trees.
- **File Functions:** create, move, copy, upload, and delete files.
- **Embedded directory-browser:** When copying, moving, deleting, or creating files, administrators can simply navigate the directory tree to find the collection they want to perform the action on.
- **Ease-of-use architecture:** All actions to be performed on files and folder are one mouse-click away.
- **Full-featured HTML editor:** HTML Editor contains WYSIWYG mode, preview functionality, and HTML source editing mode. HTML commands support tables, fonts, zooming, image and url linking, flash movie support, bulleted and numbered list, and dozens more.
- **Editor style-sheet support:** WYSIWYG editor displays current Portal style-sheet, for easy choosing of classes.
- **Internationalization Support:** Content can be attributed to a specific locale and then served to the user based on his/her browser settings.

## Message Boards

- **Instant reply:** Instant reply feature, makes for one-click replies to posts.
- **Post quoting:** Quote an existing topic and poster within a reply.
- **Flood control:** Prevents abuse of multiple posts withing a set configurable time-frame.
- **Category creation:** Create a category that contains forums within it.
- **Forum creation:** Create a forum and assign it to a specific category.
- **Forum modification:** Edit, move, delete forums.
- **Forum and category reordering:** Reorder categories and forums in the order you would like them to appear on the page.



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# Target Audience

This document is intended for those using JBoss Portal as End-Users. This is a "Where do I Click?" Guide.

For Portlet developers, Portal administrators, and those wishing to implement/extend the JBoss Portal framework, there is a Reference Guide available from our documentation page [<http://labs.jboss.com/portal/jbossportal/docs/index.html>] .

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# Acknowledgements

We would like to thank **all** the developers that participate in the JBoss Portal project effort.

Specifically,

1. Thomas Heute, for his help on the first-ever version of JBoss Portal and the corresponding documentation. ;-)
2. Remy for his help with Tomcat configuration.
3. Mark Fernandes and Paul Tamaro from Novell, for their hard work in supplying the portal project with usable and attractive themes and layouts.
4. Kev "kevs3d" Roast for supplying us with two working portlets that integrate existing frameworks in to the portal: Sun JSF-RI and Spring MVC Portlet.
5. Swarn "sdhaliwal" Dhaliwal for supplying us with the Struts-Bridge, that will allow for existing struts applications to work with the Portal.
6. Julien Viet for creating a scalable and flexible architecture... and putting up with all of my crazy ideas.

Contributions of any kind are always welcome, you can contribute by providing ideas, filling bug reports, producing some code, designing a theme, writing some documentation, etc... To report a bug please use our Jira system [<http://jira.jboss.com/jira/browse/JPORAL>] .

## JBoss Portal Basics

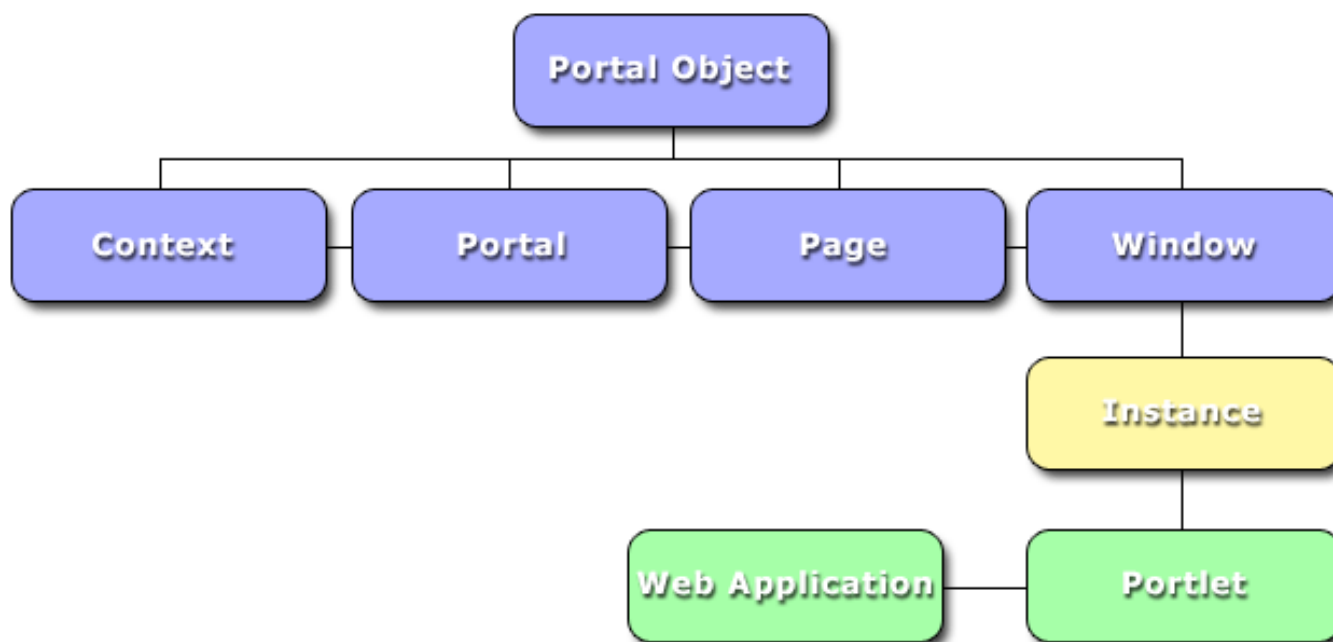
Roy Russo <roy@jboss.org>

### 1.1. Portal Concepts - Illustrated

This section will introduce the reader to some basic portal concepts and terms, used within JBoss Portal and this document.

#### 1.1.1. Portal Instances

JBoss Portal supports multiple portal instances running within one container. A portal instance can be viewed as a 'bucket', containing portal objects such as, Portal Pages, Themes, Layouts, and Portlet Windows. It also manages the relationship between the user and the portal itself. The hierarchy of portal objects is depicted as follows:



A portal instance is reachable by the url format `http://[domain]/[context]/portal/[portal_name]` . In a default/local install, the *default* portal instance can be reach by `http://localhost:8080/portal/portal/default` .

#### Note

Consult your portal administrator for information on the available portal instances - some of which may have restricted logins, not found in others.

## 1.1.2. Portal Pages

A Portal Page is an aggregator of Portlet Windows. It is generated by the portal, during the response phase. During this phase, the portal aggregates all of the HTML markup created the individual portlets, decorates them with window controls, and presents them to the user as a consolidated page.

A portal page is reachable by the url format `http://[domain]/[context]/portal/[portal_name]/[page_name]` . In a default/local install, the *default* page can be reach by `http://localhost:8080/portal/portal/default/default` [`http://localhost:8080/portal/portal/default`] . Likewise, the News Page in a default install can be reached by `http://localhost:8080/portal/portal/default/News` [`http://localhost:8080/portal/portal/default/News`] .

More, on navigating the portal pages and what they contain can be found in, Section 1.2

## 1.1.3. Portlet Windows




Portlet Windows are found on Portal Pages and contain the HTML markup for a specific portlet instance.






The diagram above, shows the default JBoss Portal page with certain window-related items highlighted (in red). Lets look at these items:

- **Window Title** Defines the content and purpose of the individual portlet window.
- **Window Fragment** The generated HTML markup produced by the portlet on the server-side.
- **Window Controls** Window controls are divided in to two categories: **Window State** and **Portlet Mode** .

- **Window State:**

-  **(Normal)** - Normal window state, is what you see in the illustration above. All portlet windows take up a similar amount of space on the page.
-  **(Minimized)** - The portlet window renders, minimal-to-no markup.
-  **(Maximized)** - The portlet window takes up a maximum amount of real estate on the page.

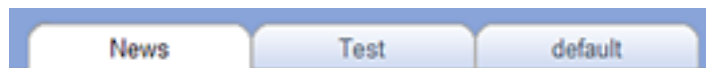
- **Portlet Mode:**

-  **(View)** - In View mode, the portlet renders markup reflecting the current window state of the portlet. The diagram above has all portlet windows in View mode.
-  **(Edit)** - Allows a user to customize the portlet's behaviour.
-  **(Help)** - A portlet should provide help information to the user.

## 1.2. The Portal Pages

### 1.2.1. Navigating the Portal Pages

Navigating the portal pages is normally performed either by typing in a specific URL ( Section 1.1.2 ), or using the Navigation Tabs at the top of the page.



Each page, in the default installation of JBoss Portal is explained in the following sections, along with the portlets found within them.

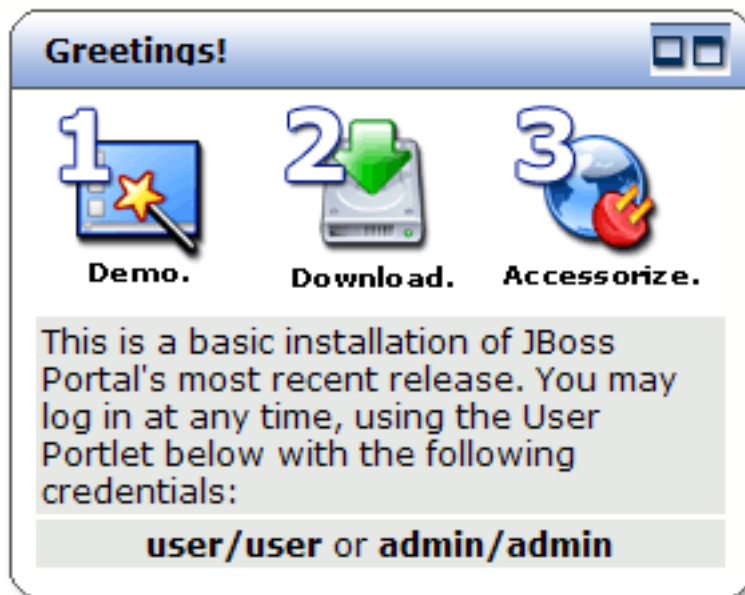
### 1.2.2. Default Page

The default page contains the following portlets:

- Section 1.2.2.1
- Section 1.2.2.2
- Section 1.2.2.3
- Section 1.2.2.4

- Section 1.2.2.5

### 1.2.2.1. Greetings Portlet

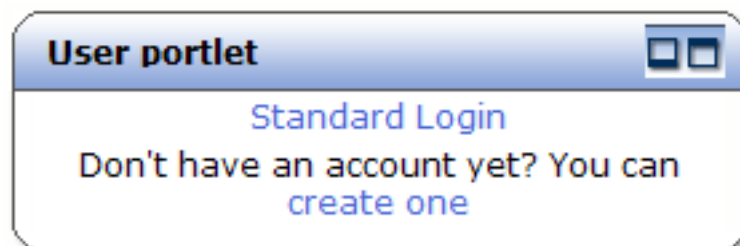


Displays hard-coded links to downloading JBoss Portal, downloading portlets from PortletSwap.com, and the live online JBoss Portal demo. It also contains default authentication information on using the UserPortlet to login.

### 1.2.2.2. User Portlet

#### Note

Administrators should view, Section 4.1 , for managing the portal Userbase. Only user operations are covered in this section...



The User Portlet allows a user to:

- **Login to the Portal**

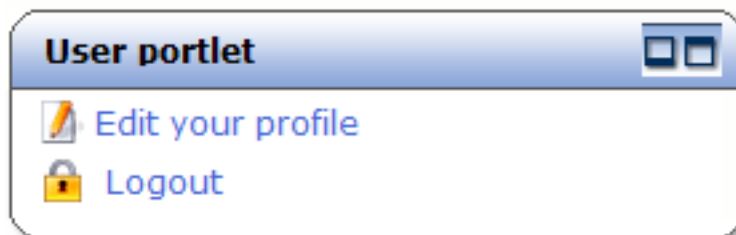
Login using the credentials (by clicking the *Standard Login* link):

Username: user  
Password: user

or

Username: admin  
Password: admin

Once successfully logged in, the user will have additional functionality at his disposal, that is covered in the following sections.



- **Create a new account**

A screenshot of the 'Create New user' form within the 'User portlet'. The form has a title bar 'User portlet' with a maximize button. Below the title bar is a section titled 'Create New user'. It contains several input fields: 'Username:', 'Password:', 'Confirm your password:', 'Real e-mail:', 'Fake e-mail:', 'Secret question:', and 'Secret answer:'. Each field has a corresponding asterisk (\*) indicating it is required. Below the 'Real e-mail' and 'Fake e-mail' fields is a note: '\*If this field is not empty, the real email will be used only to send notifications'. At the bottom of the form is a button labeled 'Create New user'. Below the form, there is a link 'Sign in' with the text 'You already have an account:'. Below that, it says 'As a registered user you can:' followed by a list of features: 'Post comments with your username', 'Send news with your username', 'Have a personal box on the homepage', 'Select how many news items to show on the homepage', 'Customize the comments', and 'Select different themes'. At the very bottom, it says 'Register now! It's free!' and 'We won't sell/give others your personal info.'

Create a new account by clicking on the *Create* link in the portlet. A User can then fill in the necessary information to create an account on the system:

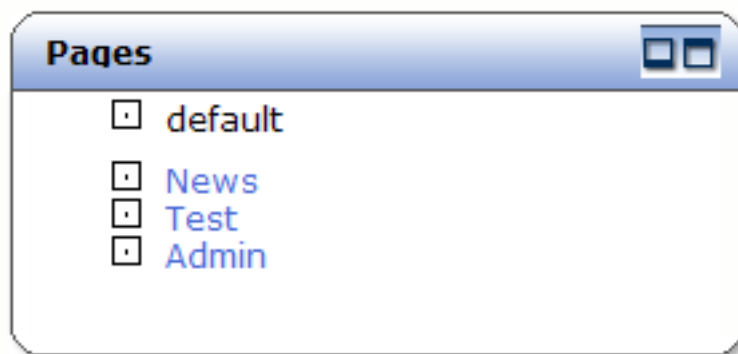
- **Edit personal information.**

A user has the ability to edit his personal information at any time by clicking on the *Edit Info* link.

The screenshot shows a web form titled "Personal information" with a "Go back to the user menu" link. The form contains the following fields and options:

- Firstname**: Text input field, Optional.
- Lastname**: Text input field, Optional.
- Real e-mail**: Text input field containing "user@portal.com", Required. Below it, a note states: "(This e-mail will not be public but is required. It will be used to send your password if you lose it)".
- Fake e-mail**: Text input field, Optional. Below it, a note states: "(This e-mail will be public. Type what you'd like. Spam proof)".
- Allow other users to view my real e-mail address**: A checked checkbox.
- Address of your personal website**: Text input field, Optional.
- Language**: A dropdown menu currently set to "Arabic".
- Time zone offset**: A dropdown menu currently set to "(GMT -12:00 hours) Eniwetok, Kwajalein".
- Theme**: A dropdown menu currently set to "Site Default".
- ICQ id**: Text input field, Optional.
- AIM id**: Text input field, Optional.
- Yahoo id**: Text input field, Optional.
- MSN messenger id**: Text input field, Optional.
- Skype id**: Text input field, Optional.
- Location**: Text input field, Optional.
- Occupation**: Text input field, Optional.
- Interests**: Text input field, Optional.

### 1.2.2.3. Page Portlet




Allows a user to navigate to different Portal Pages, by clicking on the page names. Similar to the Navigation Tabs at the top of the page.


### 1.2.2.4. CMS Portlet



JBoss Portal


JBoss Portal provides an open source platform for hosting and serving a portal's Web interface, publishing and managing its content, and customizing its experience. While most packaged Portal frameworks help enterprises launch Portals more quickly, only JBoss Portal delivers the benefits of a zero-cost open source license combined with a flexible and scalable underlying platform.






**Support Services**

JBoss Inc. offers various support services tailored to fit your needs. [Click here](#) to explore support and service options related to JBoss Portal.



**PortletSwap**

[PortletSwap.com](#) is a open community sponsored by JBoss, Inc. to facilitate the exchange of portlets and layouts for use in JBoss Portal. [Click here](#) to visit PortletSwap.com.



**Project Information**

[Click here](#) to learn more about the JBoss Portal project, on-going development, open issues, and our vibrant user and developer communities.

Thank you for downloading and deploying JBoss Portal. We hope you enjoy working with it as much as we enjoy developing it!

Bacci e Abracci,  
The JBoss Portal Team.

Renders data from the Content Management System embedded with the Portal. Users are able to navigate the content, view images, binary files, etc.. via this portlet.

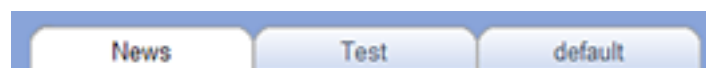
Displaying content is done by the portal using a path mapper. For example, if we wanted to display a zip file, located in `/default/foo/bar.zip`, we would type in the URL `http://localhost:8080/content/default/foo/bar.zip`. **Notice how the path to the content, is prefixed with the '/content' term.** Although in this example we are describing binary content retrieval, the same is to be said for text/html files. Keep in mind, however, that binary files are displayed outside of the portal pages, but text/html are displayed inside the CMSPortlet Window.

**Serving Logic:** The CMS Portlet now serves content based on the user's locale setting. For example: if a user's locale is set to Spanish in his browser, and he requests URL: `default/index.html`, the CMSPortlet will first try and retrieve the Spanish version of that file. If a Spanish version is not found, it will then try and retrieve the default language version set for the CMSPortlet (set to English, by default).

## Note

Administrators should view, Chapter 3, for managing the data in the CMS.

### 1.2.2.5. Navigation Portlet



## 1.2.3. News Page

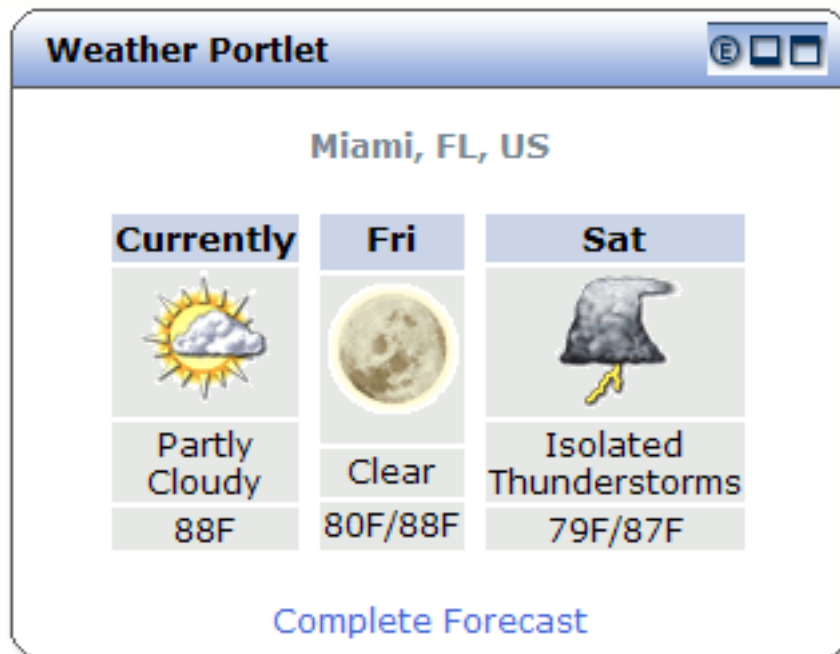
The screenshot shows the JBoss Portal interface. At the top, there's a blue header with the 'JBoss Portal' logo and four navigation tabs: 'Admin', 'News', 'Test', and 'default'. The 'News' tab is active. Below the header, the page is divided into three main sections. On the left, there's a 'Weather Portlet' for Miami, FL, US, showing a 'Currently' section with a sun and clouds icon and a temperature of 88F, and a 'Fri' section with a moon icon and a temperature of 80F/88F. To the right of the weather portlet is a 'User portlet' with links for 'Edit your profile', 'List of all the users', and 'Logout'. On the right side of the page, there are two 'News Feeds' portlets. The top one is titled 'Enter The JBoss Matrix' and lists various JBoss-related news items. The bottom one is titled 'Yahoo! Finance: RHAT News' and lists financial news items related to Red Hat.

The News Page contains customizable weather and news displays from common internet feeds. An open internet connection on the server-side is therefore required for them to operate. ;-)

This page contains the following portlets:

- Section 1.2.3.1
- Section 1.2.3.2

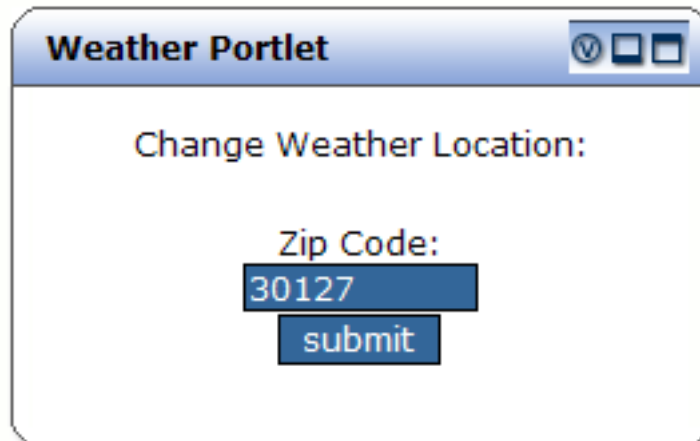
### 1.2.3.1. Weather Portlet



The Weather Portlet retrieves an RSS weather feed, based on a key (commonly a US Postal Code), and displays it as HTML to the user.

Additionally, a user is able to modify his preference in location by going in to the Portlet's Edit Mode (click  ).

Any valid US Postal Code can be inputted here. Once the form is submitted, this property will be saved in the user's preference, so he will always see the same weather data for his location, when logged in.



**Not in the United States?** Follow these steps to configure the Weather portlet to display information for your area.

1. Go to <http://weather.yahoo.com/>
2. Enter your city name in the location field, found on the page:

**YAHOO! NEWS** Weather [Sign In](#) [New User? S](#)

[Home](#) [U.S.](#) [Business](#) [World](#) [Entertainment](#)

[Photos](#) [Opinion](#) [Local News](#) [Odd News](#) [C](#)

Search:

**The Weather Channel** weather.com

**Weather**

**Enter city or zip code:**

3. Find your location on the list under the form and click on it (In this case, its *Marseille, France*):

**YAHOO!** NEWS Weather [Sign In](#) [New User? Sign Up](#)

[Home](#) [U.S.](#) [Business](#) [World](#) [Entertainment](#) [Sports](#) [Tech](#)

[Photos](#) [Opinion](#) [Local News](#) [Odd News](#) [Comics](#) [Weather](#)

Search:

---

 **Search results**

weather.com

[Weather](#) > Search

**Enter city or zip code:**

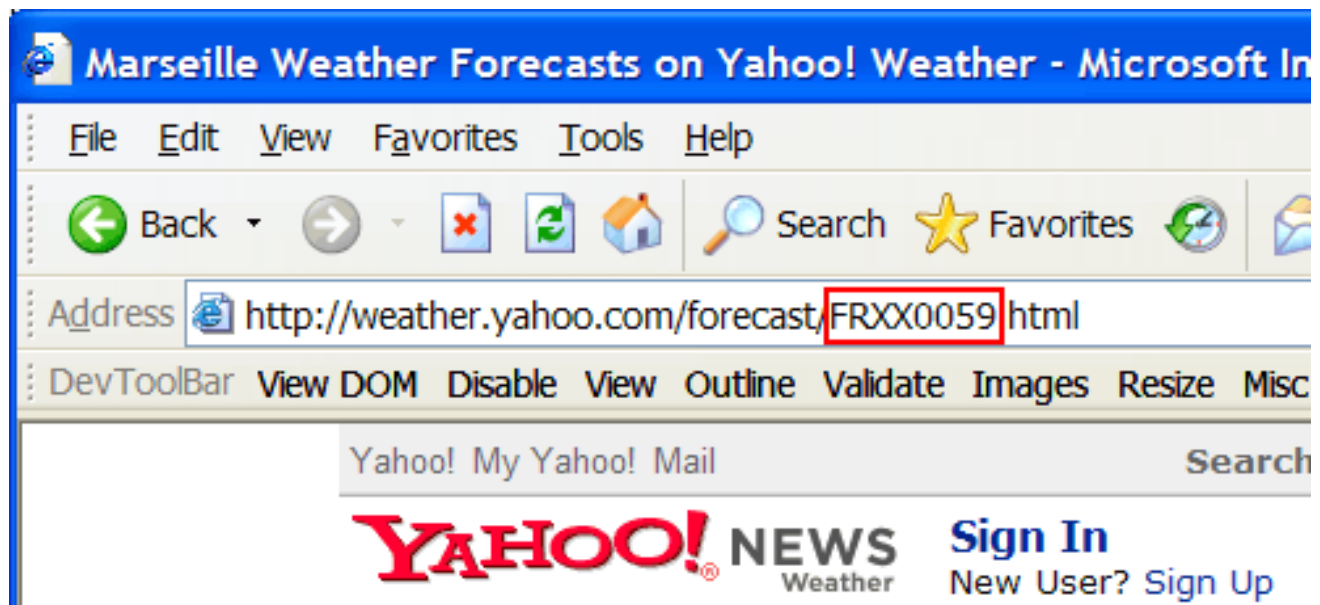
 

## Search Results

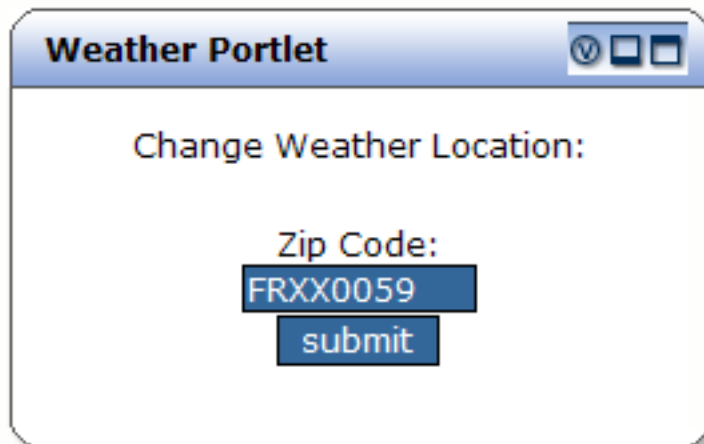
1 - 2 out of 2

▪ [Marseille, France](#)

4. Copy the location digits from the address bar in your browser (In this case, its *FRXX0059*):

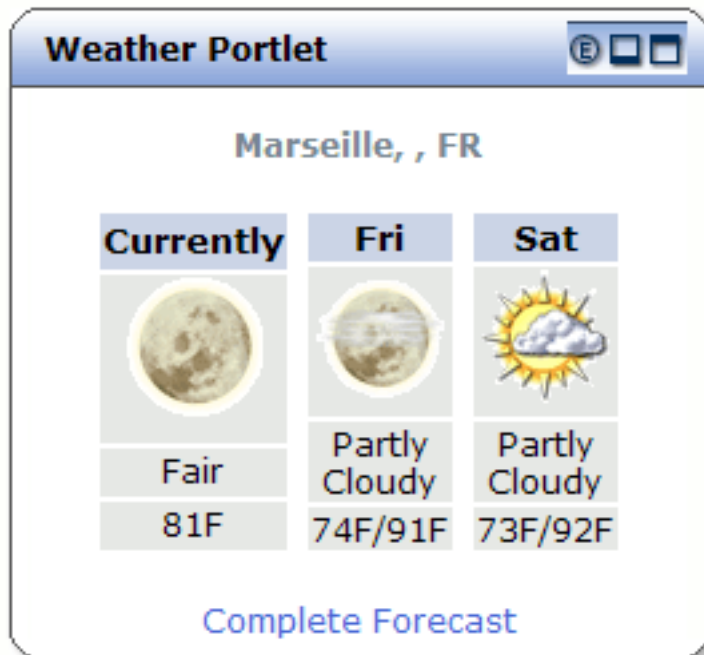


5. Paste these numbers in to the weather portlet edit form (In this case, its *FRXX0059* ):






The image shows a 'Weather Portlet' window with a title bar containing a maximize icon, a close icon, and a refresh icon. The main content area has the text 'Change Weather Location:' followed by a text input field containing 'FRXX0059' and a 'submit' button below it.

Hit *submit* ...

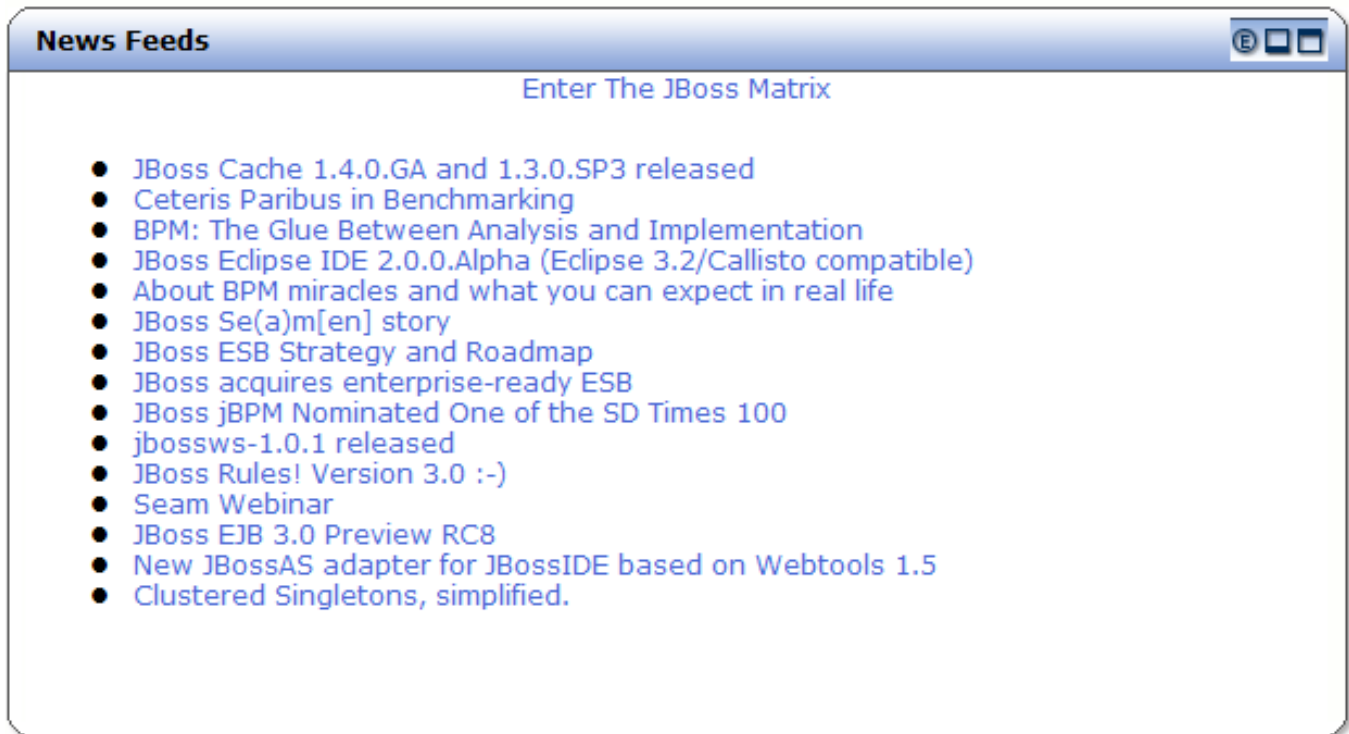


The image shows the 'Weather Portlet' window after submission. The title bar now includes an edit icon. The main content area displays 'Marseille, , FR' and a weather forecast table.


Currently	Fri	Sat
		
Fair	Partly Cloudy	Partly Cloudy
81F	74F/91F	73F/92F

Complete Forecast

#### 1.2.3.2. News Portlet



The News Portlet retrieves an RSS news feed, based on a url, and displays it as HTML to the user.

Additionally, a user is able to modify his preference in RSS feed source by going in to the Portlet's Edit Mode (click  ). Once the form is submitted, this property will be saved in the user's preference, so he will always see

the same news source, when logged in.



### Note

This portlet is capable of handling most RSS 1.0 and RSS 2.0 feeds.

## 1.2.4. Test Page




Items in this test page change frequently. They are used mainly by the JBoss Portal Development team to debug and test new functionality. For that reason, these items are not covered in this document. It is recommended that Portal Administrators remove this page for that reason.

## 1.2.5. Admin Page

## Note

You **must** be logged in as an administrator, or have proper privileges to see this page.

The screenshot displays the JBoss Portal Admin interface. The top navigation bar includes tabs for 'Admin', 'News', 'Test', and 'default'. The 'Admin' tab is selected. On the left sidebar, there are three portlets: 'User portlet' (containing links for 'Edit your profile', 'List of all the users', and 'Logout'), 'Role management' (showing 'There are 2 roles defined' and links for 'Create new role', 'Edit existing role', and 'Edit role members'), and 'Pages' (showing a tree view with 'Admin', 'News', 'Test', and 'default'). The main content area features two portlets: 'Management Portlet' (with 'Manage:' links for 'Portal', 'Instances', and 'Portlets', and a list of items including 'root (2)', 'Manager', 'Properties', 'Security', and 'Theme') and 'CMS Admin' (which includes an 'Action Menu' with 'Create', 'Import/Export', and 'Modify' options, and a 'Directory Browser' table).

Action	Name	Type	Created	Modified	Description
  	default		Fri Jul 14 10:45:33 EDT 2006	Fri Jul 14 10:45:33 EDT 2006	default

The Admin Page's purpose is to allow an administrator to manage all aspects of the portal (Follow the links for in-depth reviews of these functions):

- Users/Roles (See: Section 4.1 , Section 4.2 )
- Content Management System (See: Chapter 3 )
- Portal Objects (themes, layouts, portal instances, pages, windows, security, and deployed portlets) (See: Chapter 2 )



## Administration - Portal Object Management (Dynamicity)

Roy Russo <roy@jboss.org>

### 2.1. Introduction

#### Note

Viewing the Management Portlet is accomplished by logging in as an admin (admin/admin) and navigating to the Admin page.

The concept of dynamicity is that all portal objects are able to dynamically be modified at runtime, eliminating the need to struggle with large xml files, or restarting the application server for changes to take effect. In the scope of dynamicity, Portal objects are defined and can be altered as follows:

- Portal Instances: Multiple Portal instances can be launched at any time, secured, and skinned.
- Pages: Multiple pages, composed of windows, can coexist inside a portal instance, secured and each could have its own theme applied, if desired.
- Portlets: Can be hot-deployed and will instantly register with the portal, appearing in the management portlet.
- Portlet Instances: Instances can be created/destroyed. Their preference variables can be modified at runtime, instances assigned to windows and secured.
- Windows: Windows can be secured, created/destroyed, and assigned to specific pages.
- Themes/Layouts: Can be hot-deployed and will register with the portal, appearing the management portlet, allowing for dynamic customization of any of the above components.

#### Note

Many of the operations that can be done via the Management portlet are done in the context of the current user session. In order to see the changes on the affected pages, please log out and log back in.

### 2.2. Actions

Dynamicity allows an administrator to manage the entire portal deployment from within a portlet. Some of the many tasks available to administrators are:

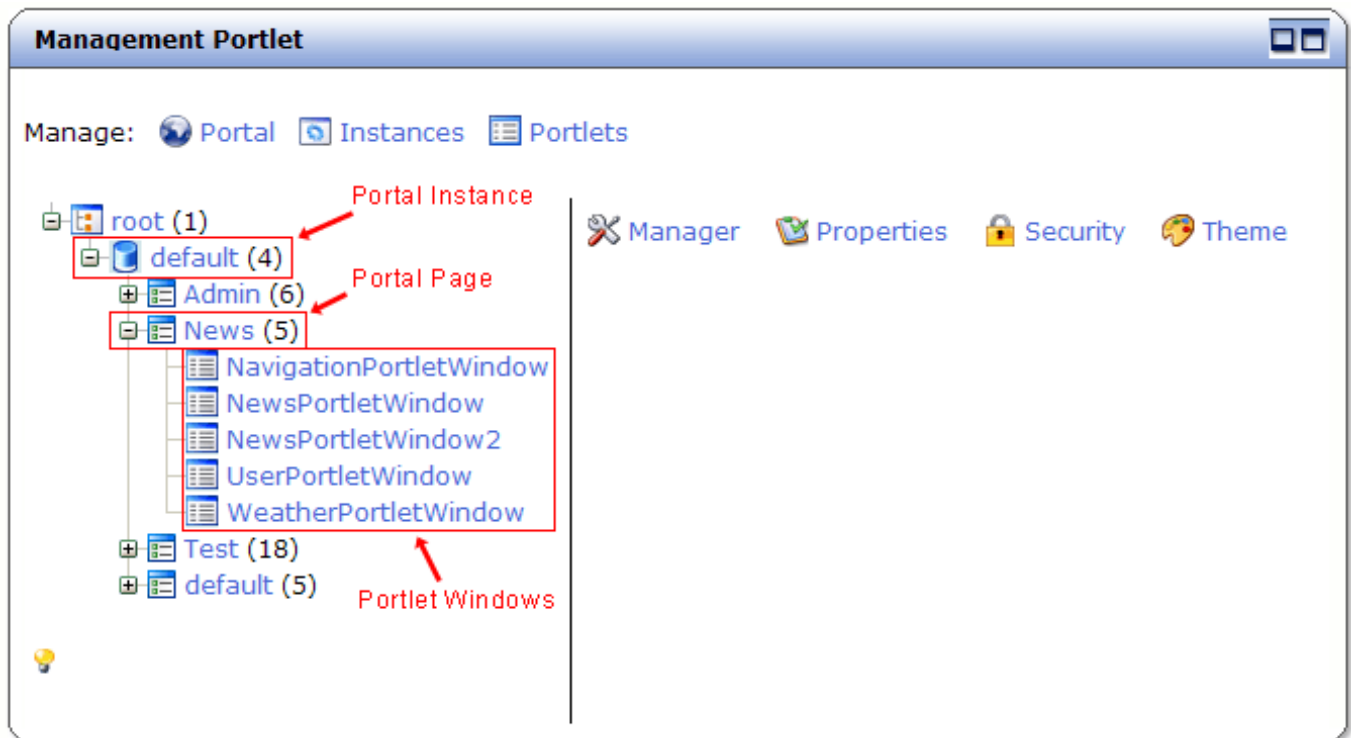
- Section 2.2.1
  - Section 2.2.1.1
  - Section 2.2.1.2
- Section 2.2.3
  - Section 2.2.3.2
  - Section 2.2.3.3
  - Section 2.2.3.4
  - Section 2.2.3.5
  - Section 2.2.3.6
- Section 2.2.2
  - Section 2.2.2.1
  - Section 2.2.2.2
  - Section 2.2.2.3

**Note**

For the remainder of this chapter, the term **object** will be used to mean any Portal, Page, Portlet, or Window.

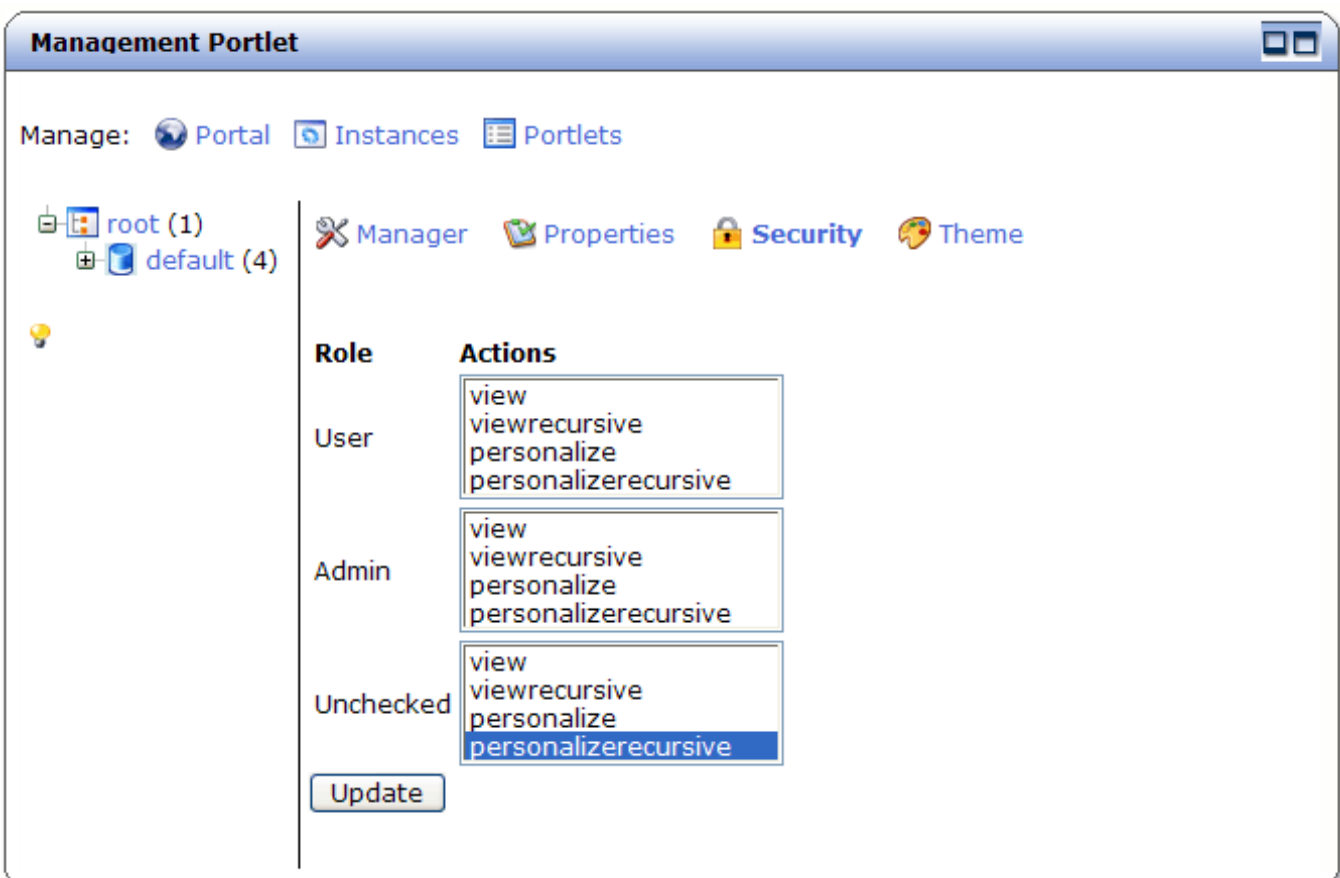
## 2.2.1. Managing portal instances

Administrators may manage the portal, pages, subpages, and windows at any time, by clicking on the "Portal" tab at the top of the Management Portlet. The components currently deployed in the portal container are displayed in a tree-structure for ease-of-navigation and modification.



Expanding the tree structure will reveal all pages and portlet windows deployed in a particular portal instance.

#### 2.2.1.1. Securing portal instances



Selecting the *Security* option, allows an administrator to secure the portal instance. On this screen, you can select

and unselect portal-wide security settings for a given role. Security settings are defined as follows:

- **view** Users can view the object.
- **viewrecursive** Users can view the object and child objects.
- **personalize** Users are able to view AND personalize the object.
- **personalizerecursive** Users are able to view AND personalize the object AND its child objects.

### 2.2.1.2. Modifying the portal Theme/Layout

The screenshot shows the 'Management Portlet' window. At the top, there are tabs for 'Portal', 'Instances', and 'Portlets'. Below the tabs, a tree view on the left shows a hierarchy: 'root (1)' containing 'default (4)'. To the right of the tree, there are four icons: 'Manager' (wrench), 'Properties' (notepad), 'Security' (lock), and 'Theme' (palette). The 'Theme' option is selected. The main area displays the configuration for the 'default' portal instance. It shows 'Name: default' and 'Type: PORTAL'. Below this, there are several dropdown menus for configuration: 'Layout' (set to 'generic'), 'Theme' (set to 'Nphalanx'), 'RenderSet' (set to 'divRenderer'), 'Layout Strategy' (set to 'maximizedRegion'), 'Window Renderer' (set to 'no selection'), 'Decoration Renderer' (set to 'no selection'), and 'Portlet Renderer' (set to 'no selection'). At the bottom left of the configuration area is an 'Update' button.

Selecting the *Theme* option, allows an administrator to modify the look-and-feel for the chosen portal instance. An administrator is also able to choose a specific layout for a portal, as well as a theme.

## 2.2.2. Managing portlets and portlet instances

### 2.2.2.1. Creating portlet instances

**Management Portlet**

Manage: Portal Instances Portlet

Web application id : samples/portal-samples

Name	State	Description
Portlet Test	Started	C'est une portlet de test
HeaderContentPortlet	Started	-
CachedCounterPortlet	Started	-
ThemeSelectorPortlet	Started	-
WsrpSelectorTestPortlet	Started	-
ExceptionPortlet	Started	-
ContentRewritePortlet	Started	-
PortletA	Started	-
SecuredTestPortlet	Started	-
HintPortlet	Started	-
CharsetPortlet	Started	-
PortletB	Started	-
PortletSessionPortlet	Started	-
PreferencesPortlet	Started	-
CounterPortlet	Started	-

Web application id : portal/portal-core

Name	State	Description
ThemeManager	Started	-
ManagementPortlet	Started	-
UserPortlet	Started	-
CatalogPortlet	Started	-
CMSPortlet	Started	-
ThemeSelectorPortlet	Started	-
PolicyConfiguratorPortlet	Started	-
NavigationPortlet	Started	-
CMSAdminPortlet	Started	-

**Manager**
**Security**

Name: CMSPortlet  
 State: Started  
 Description: -

Clicking on the *Portlet* tab and then clicking on a specific portlet allows you to create a new instance of this portlet.

#### 2.2.2.2. Modifying portlet instance preferences

**Management Portlet**

Manage: [Portal](#) [Instances](#) [Portlet](#)

Id	Portlet	Action
PolicyConfiguratorPortletInstance	PolicyConfiguratorPortlet	
CMSPortletInstance	CMSPortlet	
CMSAdminPortletInstance	CMSAdminPortlet	
ManagementPortletInstance	ManagementPortlet	
NavigationPortletInstance	NavigationPortlet	
UserPortletInstance	UserPortlet	
CatalogPortletInstance	CatalogPortlet	
ThemePortletInstance	ThemeManager	
ThemeSelectorInstance	ThemeSelectorPortlet	
TestPortletInstance	Portlet Test	
CounterPortletInstance	CounterPortlet	
CachedCounterPortletInstance	CachedCounterPortlet	
PortletSessionPortletInstance	PortletSessionPortlet	
CharsetPortletInstance	CharsetPortlet	
ExceptionPortletInstance	ExceptionPortlet	
MissingPortletInstance	Portlet not deployed	
PreferencesPortletInstance	PreferencesPortlet	
PortletAInstance	PortletA	
PortletBInstance	PortletB	
HeaderContentInstance	HeaderContentPortlet	
ContentRewriteInstance	ContentRewritePortlet	
SecuredTestPortletInstance	SecuredTestPortlet	
HintPortletInstance	HintPortlet	
WsrpSelectorTestPortletInstance	WsrpSelectorTestPortlet	
CMSInstance2	CMSPortlet	

Preferences
 Security

Key	Description	ReadOnly	Value	Instance	Portlet
html chars	Description	false	changeme		%3C%26%3E%22
read-write foo	Description	false	bar		bar
read-write foo	Description	false	bar0,bar1		bar0,bar1
read-only foo	Description	true	bar		bar

Clicking on the *Instance* tab and selecting a portlet instance, displays a screen which allows an administrator to edit the portlet instance preferences.

### 2.2.2.3. Securing portlets

Management Portlet

Manage:
Portal
Instances
Portlets

Id	Portlet	Action
WeatherPortletInstance	Weather Portlet	
NewsPortletInstance	News Portlet	
JSPPortletInstance	JSF Portlet	
URLPortletInstance	URL Portlet	
NewsPortletInstance2	News Portlet	
TestPortletInstance	Test Portlet	
PortletAInstance	Portlet A	
PortletBInstance	Portlet B	
HeaderContentInstance	Header Content Portlet	
ContentRewriteInstance	Content Rewrite Portlet	
SecuredTestPortletInstance	Secured Test Portlet	
HintPortletInstance	Hint Portlet	
CharsetPortletInstance	Charset Portlet	
CounterPortletInstance	Counter Portlet	
CachedCounterPortletInstance	Cached Counter Portlet	

Preferences
Security

Role	Actions
User	view
Admin	view
Unchecked	view

Update

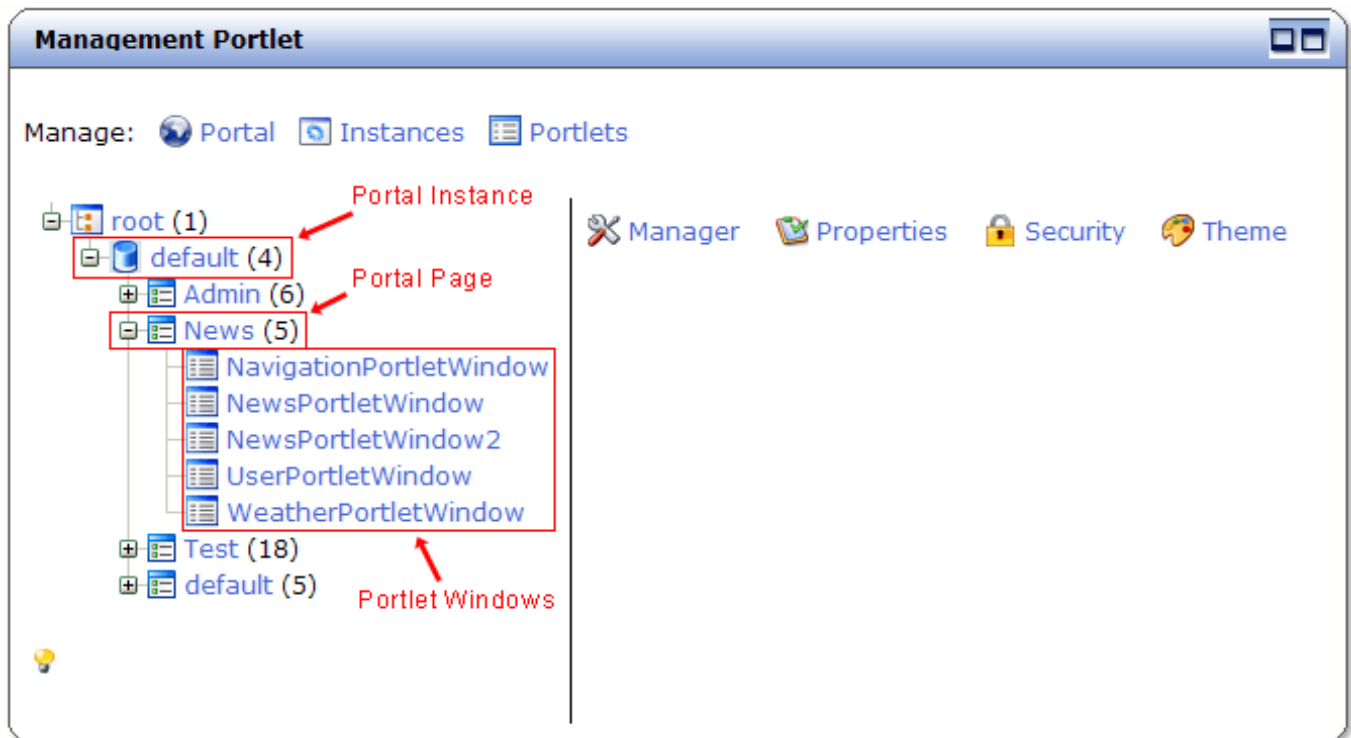
Selecting the *Security* option, allows an administrator to secure the portlet instance. Security settings are defined as follows:

- **view** Users can view the object.
- **viewrecursive** Users can view the object and child objects.
- **personalize** Users are able to view AND personalize the object.
- **personalizerecursive** Users are able to view AND personalize the object AND its child objects.

### Note

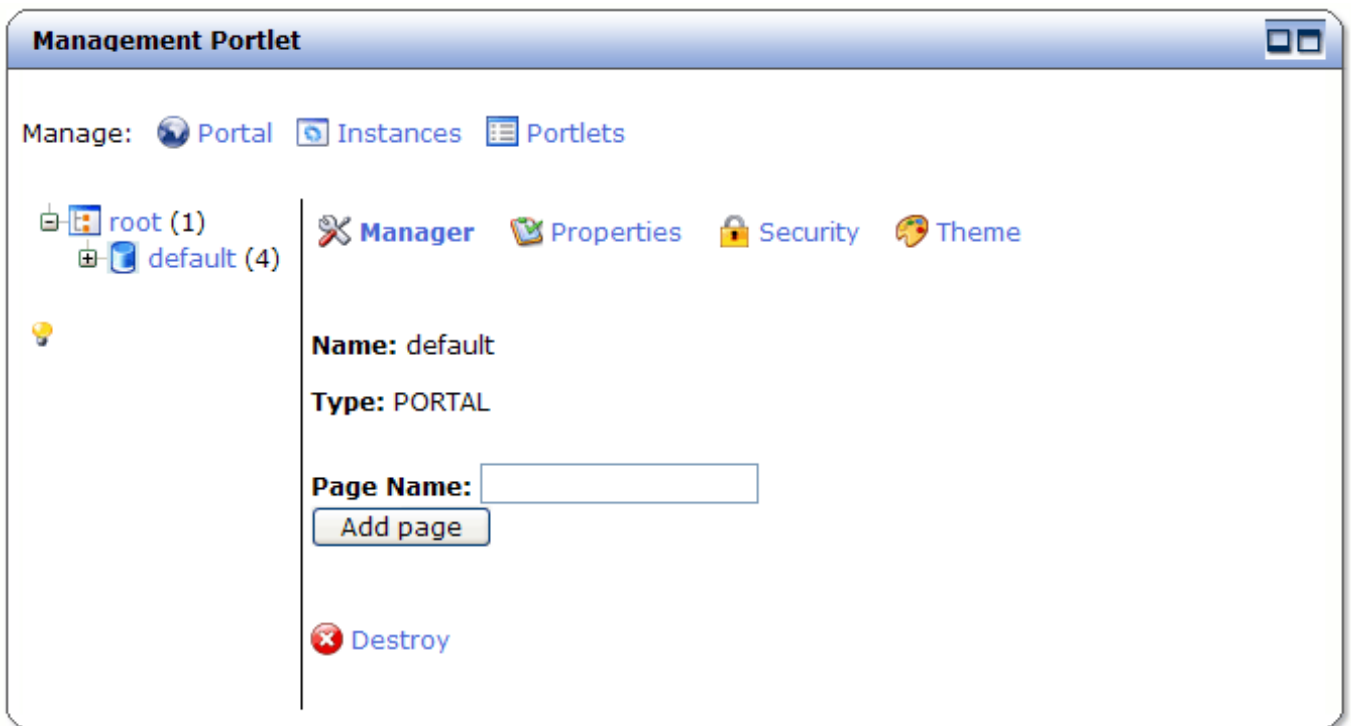
Depending on whether you are securing a portlet or an instance, keep in mind that instance security constraints take precedence over portlet security settings.

## 2.2.3. Managing Portal Pages



Expanding the tree structure will reveal all pages deployed in a particular portal instance, that an administrator can then customize.

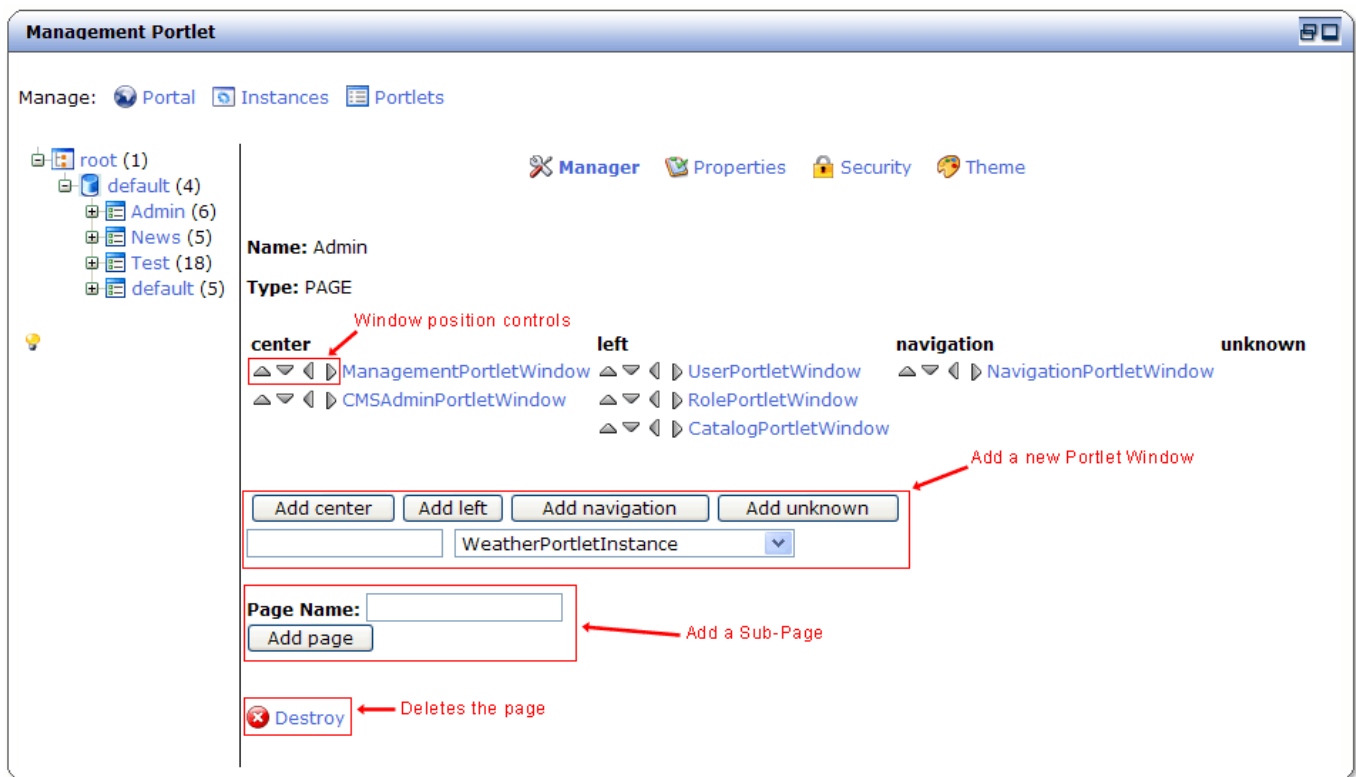
### 2.2.3.1. Creating portal pages



By selecting a portal instance, and then selecting the *Manage* option, you can create a new page. Simply assign a name to a page and submit the form.

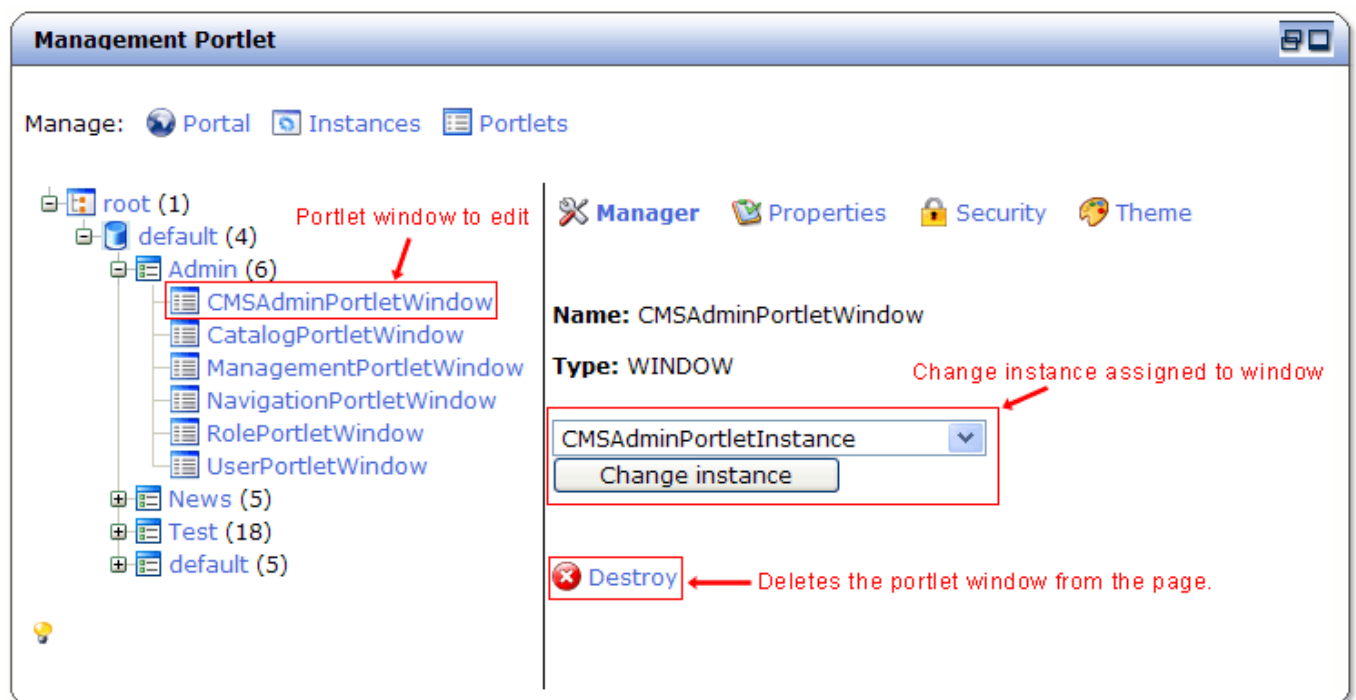
### 2.2.3.2. Creating portlet windows





Selecting a portal page, allows you to *Manage* the order in which windows appear and the layout column in which they will appear. Additionally, you can name and assign portlet windows on the selected page, create subpages, or even delete the page.

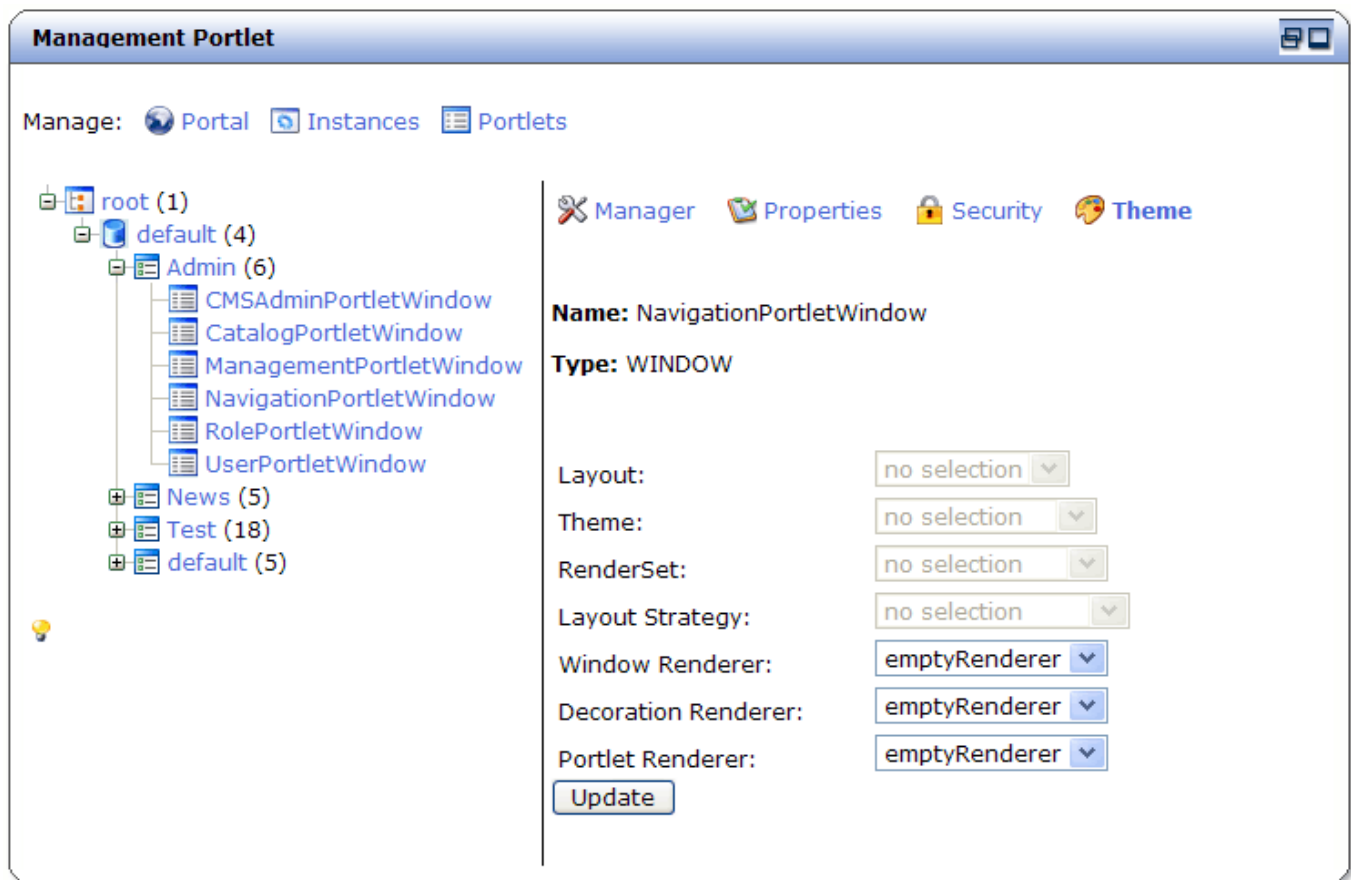
### 2.2.3.3. Edit portlet windows



Selecting a portlet window, allows you to *Manage* which portlet instance is assigned to it, and even delete/remove

the window from the page.

#### 2.2.3.4. Modifying the Window Theme/Layout

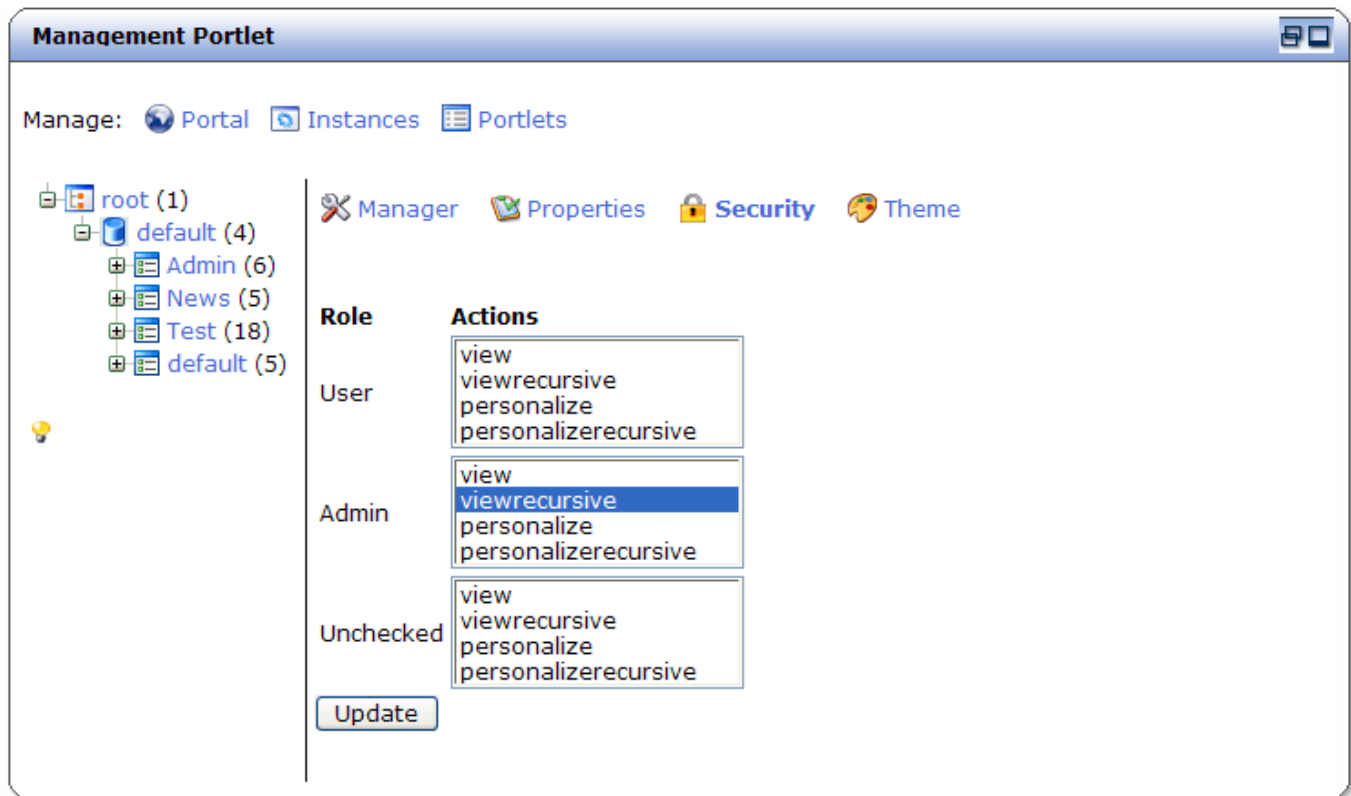


Selecting a portal window under the *Portal* tab, and selecting the *Theme* option, allows an administrator to modify the look-and-feel for the chosen portal page.

#### Note

From this screen, an administrator can elect to set all values to *emptyrenderer* so the portlet window is displayed with no decorations and appears to be part of the layout.

#### 2.2.3.5. Securing portal pages



Selecting the *Security* option, allows an administrator to secure the portal page. On this screen, you can select and unselect page security settings for a given role. Security settings are defined as follows:

- **view** Users can view the object.
- **viewrecursive** Users can view the object and child objects.
- **personalize** Users are able to view AND personalize the object.
- **personalizerecursive** Users are able to view AND personalize the object AND its child objects.

#### 2.2.3.6. Modifying the Page Theme/Layout

The screenshot displays the 'Management Portlet' interface. At the top, there are tabs for 'Portal', 'Instances', and 'Portlets'. The 'Portlets' tab is active, showing a tree view on the left with the following structure:

- root (1)
  - default (4)
    - Admin (6)
    - News (5)
    - Test (18)
    - default (5)

On the right side, there are four icons: Manager, Properties, Security, and Theme. The 'Theme' icon is highlighted. Below these icons, the configuration for the selected 'Admin' portal page is shown:

**Name:** Admin  
**Type:** PAGE

Below the configuration details, there are several dropdown menus for selecting different components:

- Layout: no selection
- Theme: no selection
- RenderSet: no selection
- Layout Strategy: no selection
- Window Renderer: no selection
- Decoration Renderer: no selection
- Portlet Renderer: no selection

An 'Update' button is located at the bottom of the configuration section.

Selecting the *Theme* option, allows an administrator to modify the look-and-feel for the chosen portal page.

## Administration - Content Management System

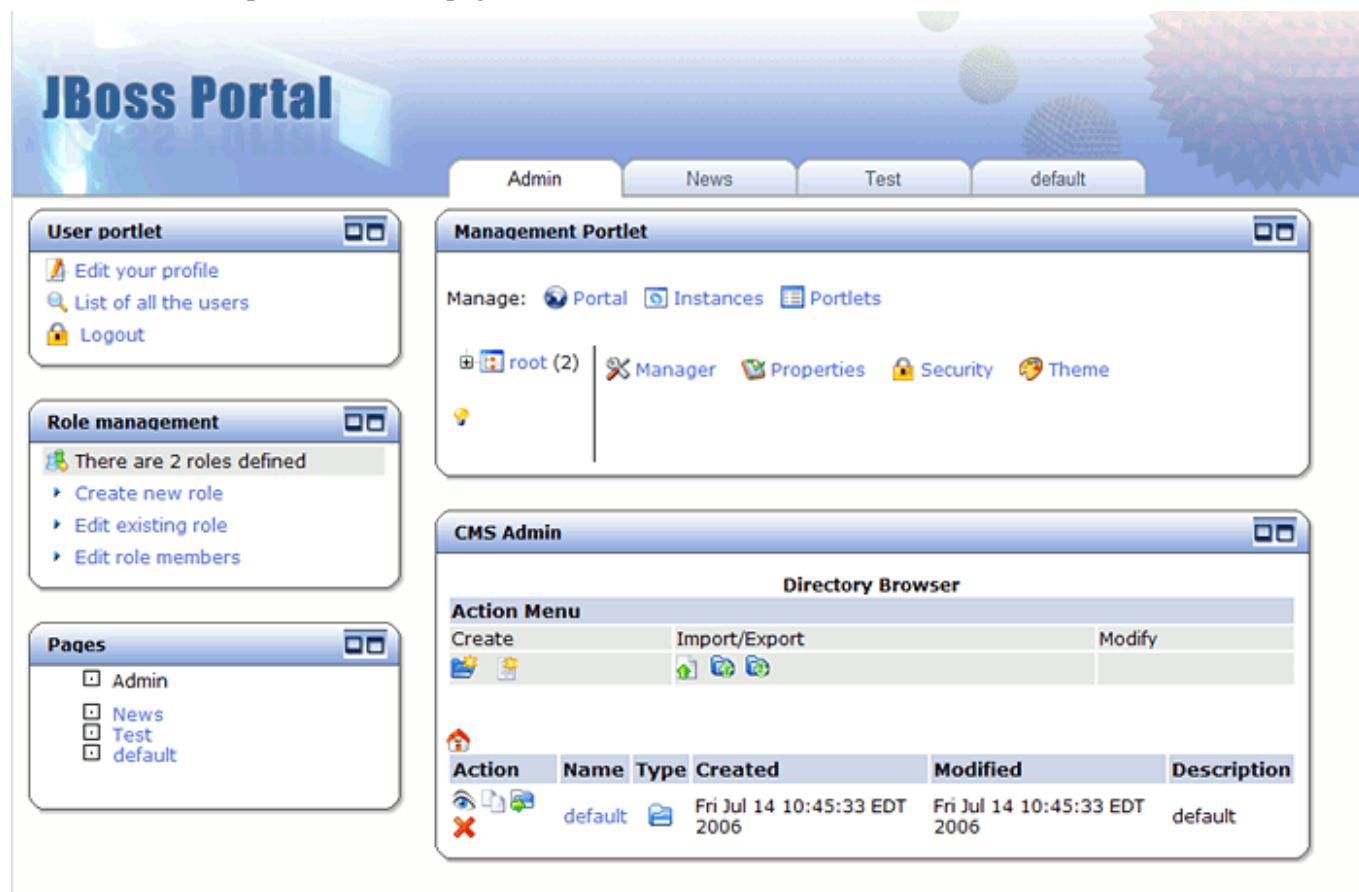
Roy Russo <roy@jboss.org>

### 3.1. Introduction

The CMSAdmin Portlet allows control over the content management system.

Viewing the CMSAdmin Portlet is accomplished by logging in as an admin (admin/admin) and navigating to the Admin page.












You should then be presented with a page that is similar to this:





It is important for a user to note the action icons used throughout the portlet and their meanings. The action options change depending on what type of resource the user is dealing with. All possible actions are listed here:

- Launches HTML WYSIWYG Editor window for HTML files. Launches upload dialog window for binary

type files.

-  - Opens the copy file/folder dialog window.
-  - Opens the move file/folder dialog window.
-  - Launches HTML WYSIWYG Editor window.
-  - Opens the create folder dialog window.
-  - Opens the upload file dialog window.
-  - Opens the upload archive dialog window.
-  - Opens the export archive dialog window.
-  - Opens the delete confirmation dialog window.
-  - In the case of files, opens the file properties view. In the case of folders, opens the folder listing.
-  - Moves up the folder tree when clicked on.
-  - Expands directory tree.

Additionally, there are icons that help describe the types of resources present on the page:

-  - Denotes this resource as a file.
-  - Denotes this resource as a folder.

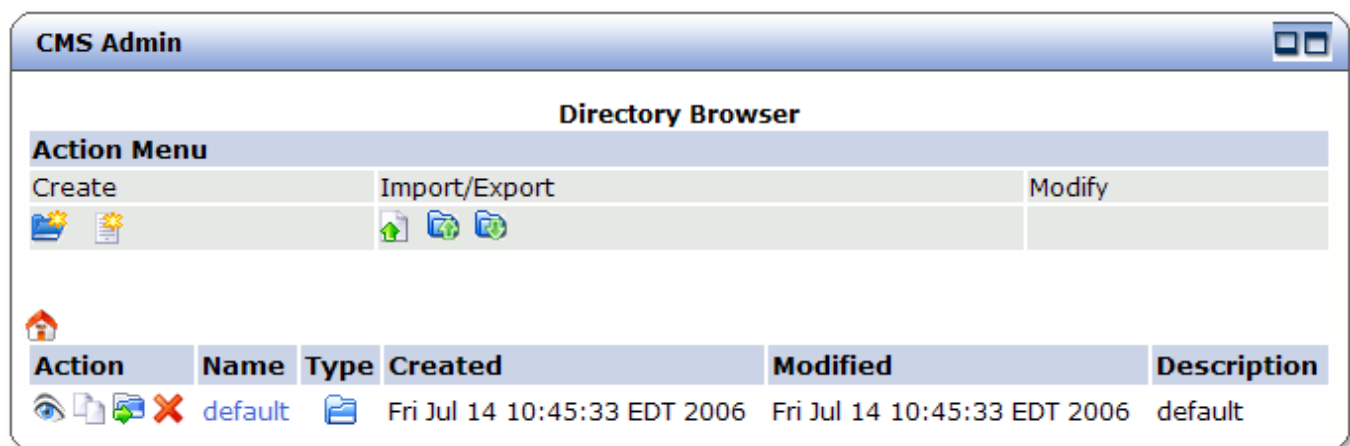
## 3.2. Actions


This section describes common actions an administrator can perform from within the AdminCMS Portlet:

- Section 3.2.1
- Section 3.2.2
- Section 3.2.3
- Section 3.2.4
- Section 3.2.5
- Section 3.2.6

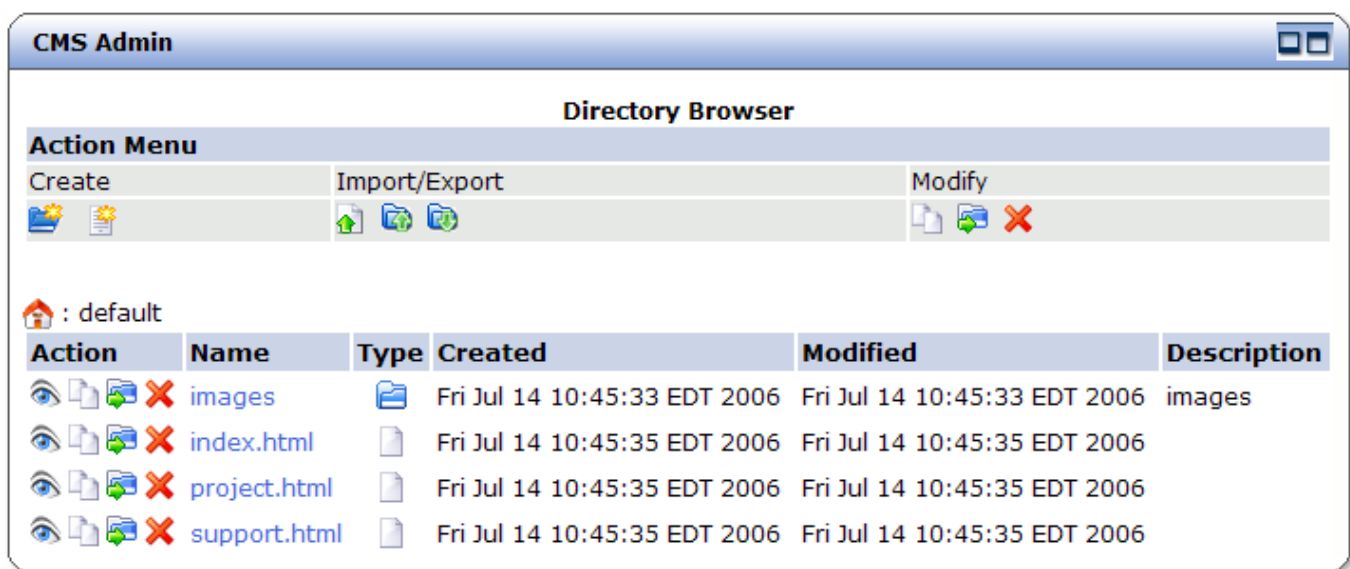
- Section 3.2.7
- Section 3.2.8
- Section 3.2.9
- Section 3.2.10
- Section 3.2.11


### 3.2.1. Viewing Directories

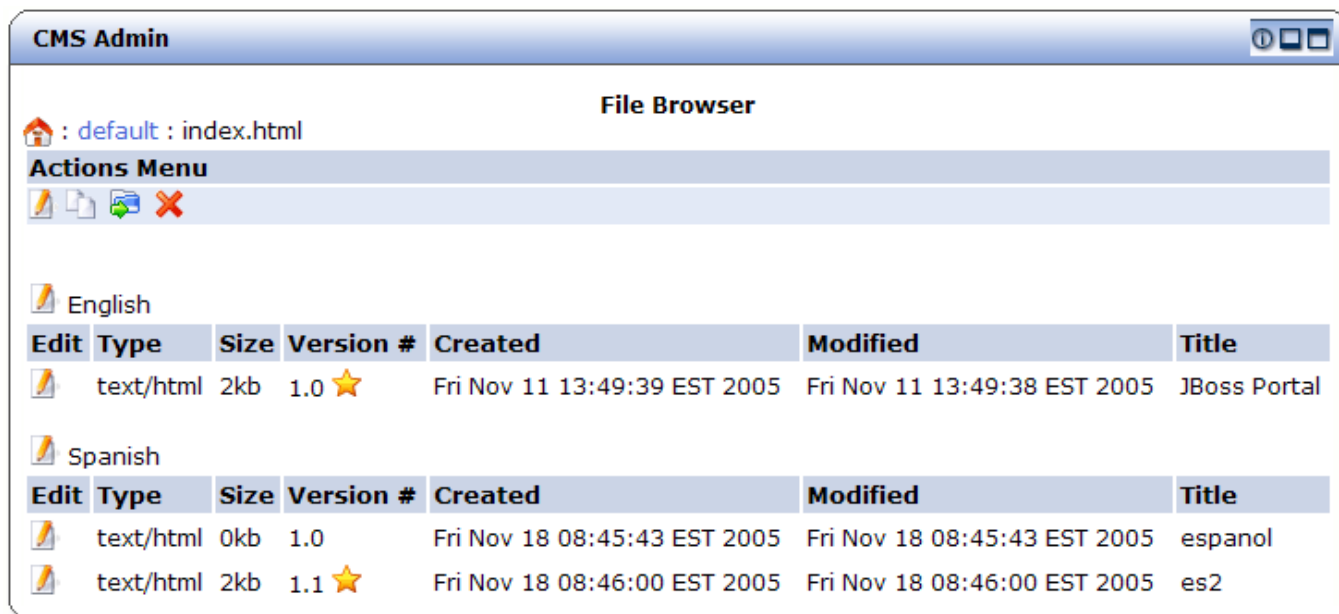


A user can list directory contents by either clicking on the  icon, or clicking on the directory's "DisplayName". All actions are possible from this screen.

### 3.2.2. Viewing File Properties



Clicking on the  icon or the "DisplayName" of a file brings up the File Properties page.

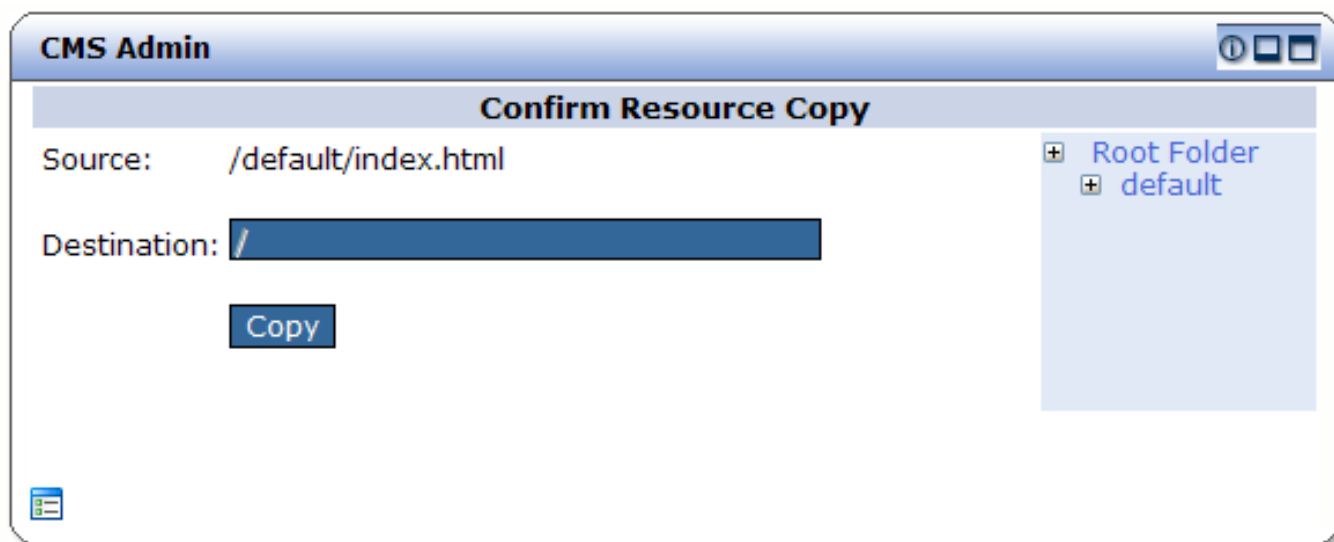


The File Properties window displays all the possible actions available to perform on a file.

Version and Locale Information are also contained on this screen. Note that any version labeled with the ★ is the current "live" version shown to users.

### 3.2.3. Copying Files/Directories


Clicking on the icon displays the copy file/directory dialog window.

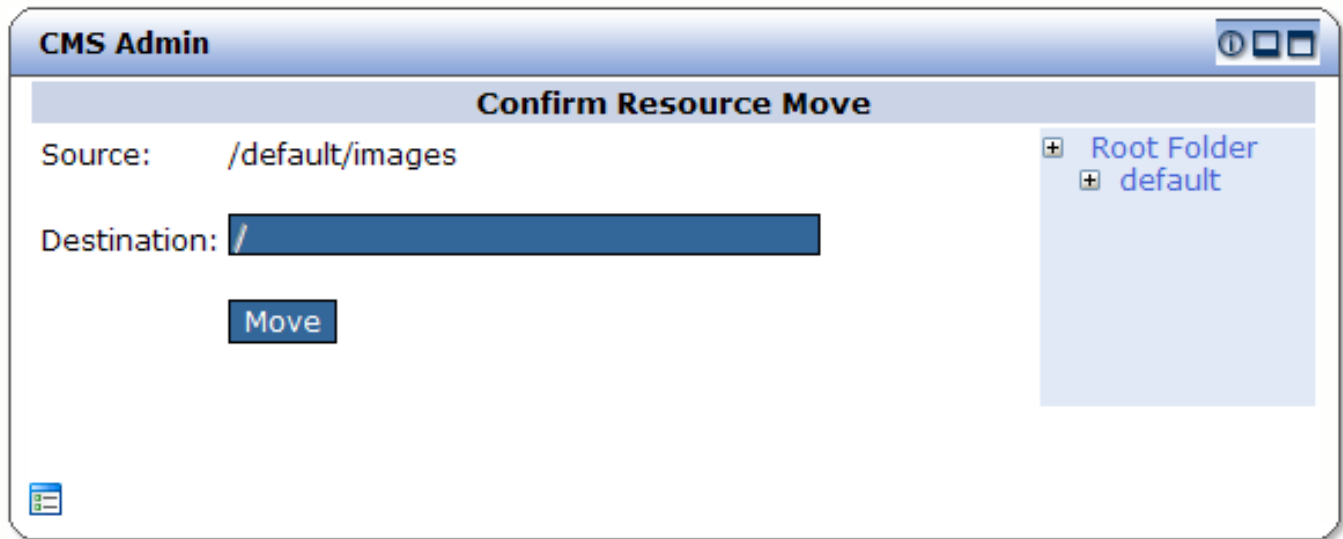



The copy resource window allows a user to copy files to any folder on the system, as well as copy whole directory trees to any directory on the system. A user can select which destination directory to copy the resource to, by using the directory browser. Clicking the + icon expands the directory tree. Clicking on the name of the directory within the tree, sets it as the destination directory for the copied resource.

### 3.2.4. Moving Files/Directories




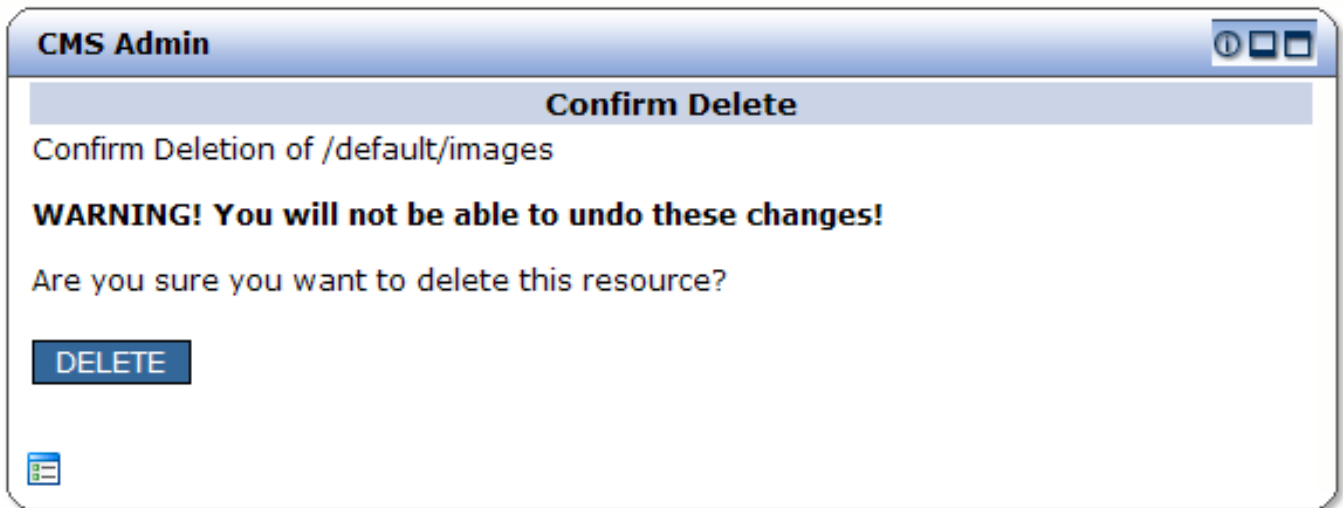
Clicking on the  icon displays the move file/directory dialog window.



The move resource window allows a user to move files to any folder on the system, as well as move whole directory trees to any directory on the system. A user can select which destination directory to move the resource to, by using the directory browser. Clicking the  icon expands the directory tree. Clicking on the name of the directory within the tree, sets it as the destination directory for the moved resource.

### 3.2.5. Deleting Files/Directories

Clicking on the  icon displays the delete file/directory confirmation window.




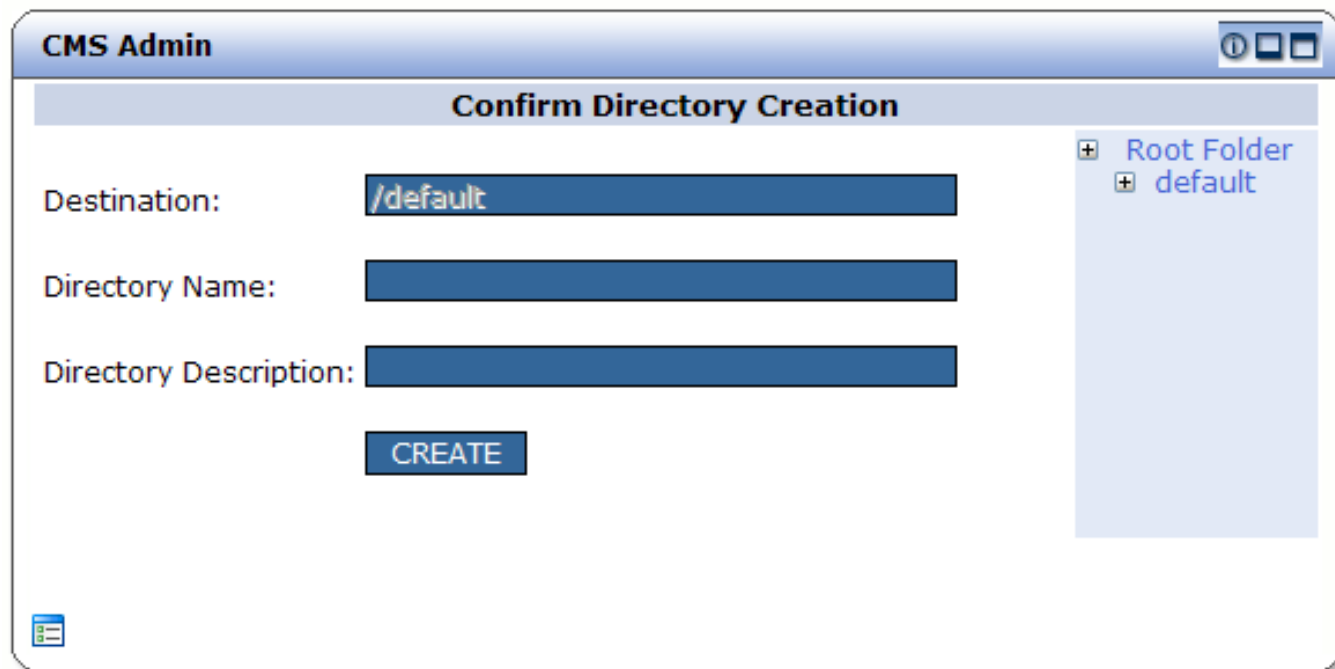
The delete resource confirmation window allows a user to delete a file, or a directory on the system. Note that deleting a directory, will delete the entire tree, so all directories under the deleted one, will also be deleted.

#### Warning

Currently, there is no way to retrieve deleted files/directories! Deleting a file or directory is permanent!

### 3.2.6. Creating Directories


Clicking on the  icon displays the create directory dialog window.



The image shows a dialog window titled "CMS Admin" with a subtitle "Confirm Directory Creation". It contains three input fields: "Destination:" with the value "/default", "Directory Name:" (empty), and "Directory Description:" (empty). Below these fields is a "CREATE" button. On the right side, there is a tree view showing a folder structure: "Root Folder" (expanded) and "default" (subfolder). A small icon is visible in the bottom left corner of the dialog.

The create directory resource window allows a user to create a directory under chosen path. On this window, a user can specify a name for the new empty directory and assign it a description.

### 3.2.7. Creating Text/HTML Files

Clicking on the  icon displays the create file dialog window with the embedded WYSIWYG editor and directory browser.

**CMS Admin**

**Create File**


**Creating File in directory:** /


































**FileName:**


**Description:**

**Title:**

**Language:**

 Links to resources within this portal should be absolute. For example: A link to an image located in default/images/back.gif should be typed in exactly as shown here. Do not prefix a slash (/) to the path of the resource. You can verify the link is correct by clicking on the preview button in the editor.

**B** **I** **U** **ABC**                                   


An in-depth walk-through of the editor is beyond the scope of this document. However, the editor does contain help pages within it, that can be accessed by clicking the  icon.

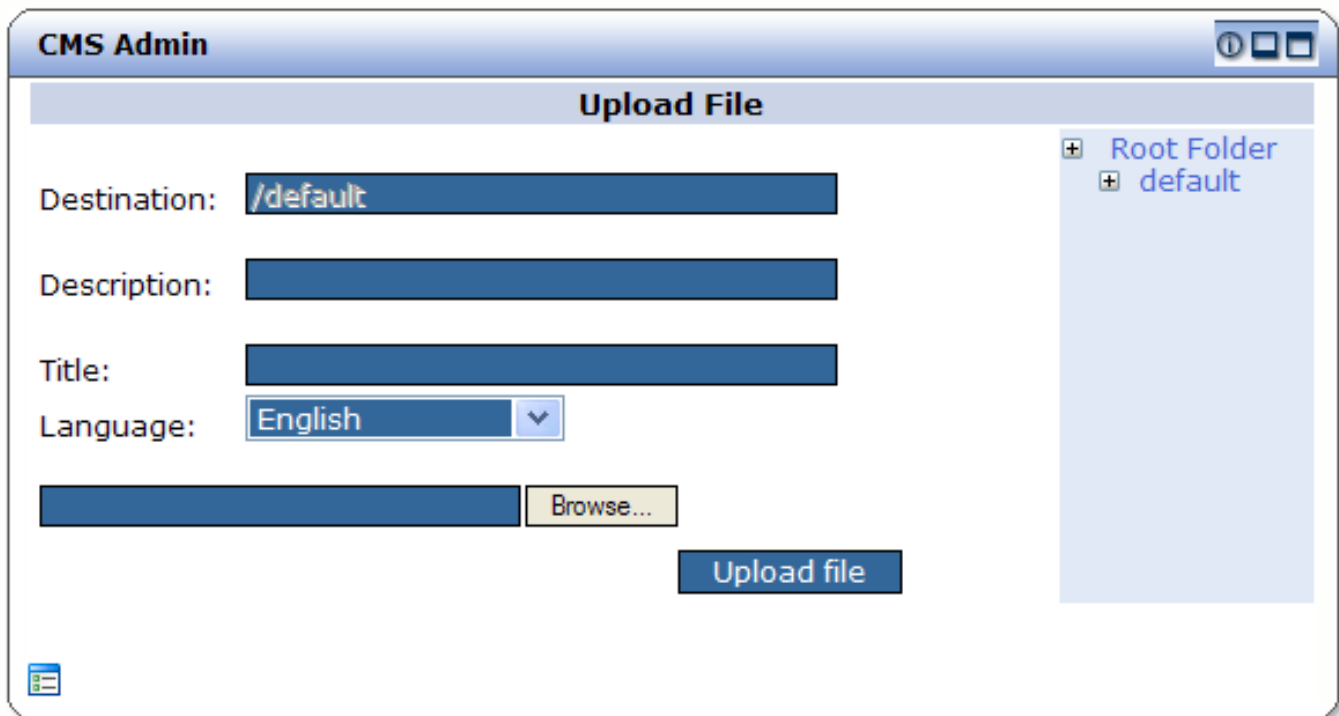
### Note

It is important to note here that when creating links to images or other resources within the system, as user must use the relative file path to that resource. ie: images/hello.gif. Keep in mind at all times that the document base is `http://localhost/portal/` by default!


Additionally, a user can set a title for the file that will be used in the portlet title bar, and a language for the file, used in serving localized content.

## 3.2.8. Uploading Files


Clicking on the  icon displays the upload file dialog window.

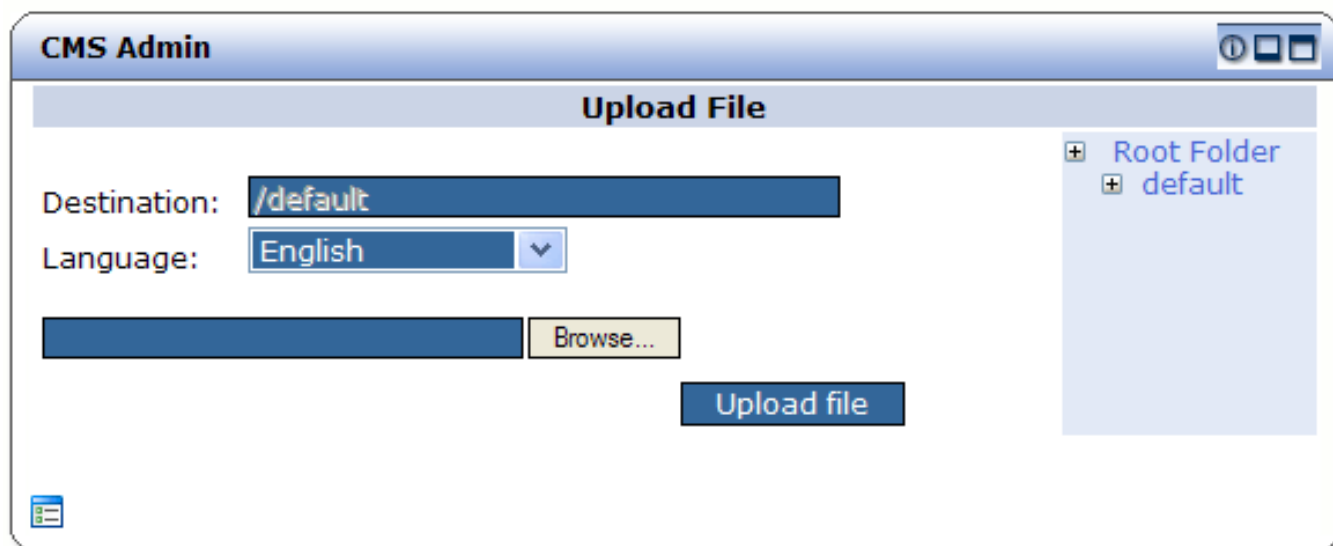



The screenshot shows a web-based dialog window titled "CMS Admin" with a sub-header "Upload File". The window contains several input fields: "Destination:" with a text box containing "/default", "Description:" with an empty text box, "Title:" with an empty text box, and "Language:" with a dropdown menu showing "English". Below these fields is a file selection area with a text box and a "Browse..." button. At the bottom right is a large "Upload file" button. On the right side of the dialog is a directory tree with a plus icon and the text "Root Folder" and "default". A small icon is visible in the bottom left corner of the dialog.

The upload file window allows a user to upload files to any directory on the system. The upload process will work on files up to 1GB and of all types. A user can select which destination directory to upload the resource to, by using the directory browser. Clicking the  icon expands the directory tree. Clicking on the name of the directory within the tree, sets it as the destination directory for the uploaded resource. Additionally, a user can set a title for the file that will be used in the portlet title bar, and a language for the file, used in serving localized content.


## 3.2.9. Uploading Archives

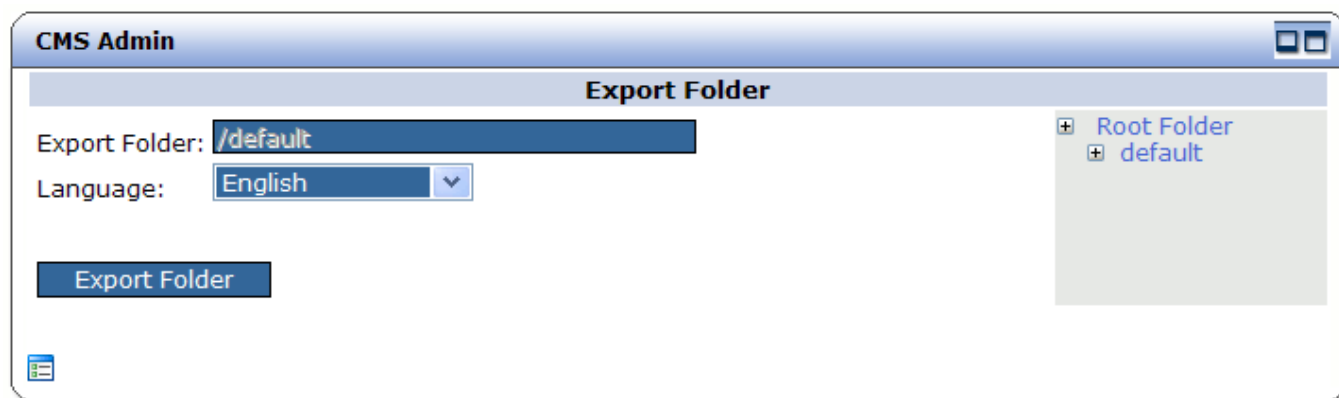
Clicking on the  icon displays the upload archive dialog window.




The upload archive window allows a user to upload archives to any directory on the system. The system will then explode the archive, create versions, and place all the files in the repository. A user can select which destination directory to upload the resource to, by using the directory browser. Clicking the  icon expands the directory tree. Clicking on the name of the directory within the tree, sets it as the destination directory for the uploaded resource. Additionally, a user can set a language for the archive files, used in serving localized content.

### 3.2.10. Exporting Archives

Clicking on the  icon displays the export archive dialog window.

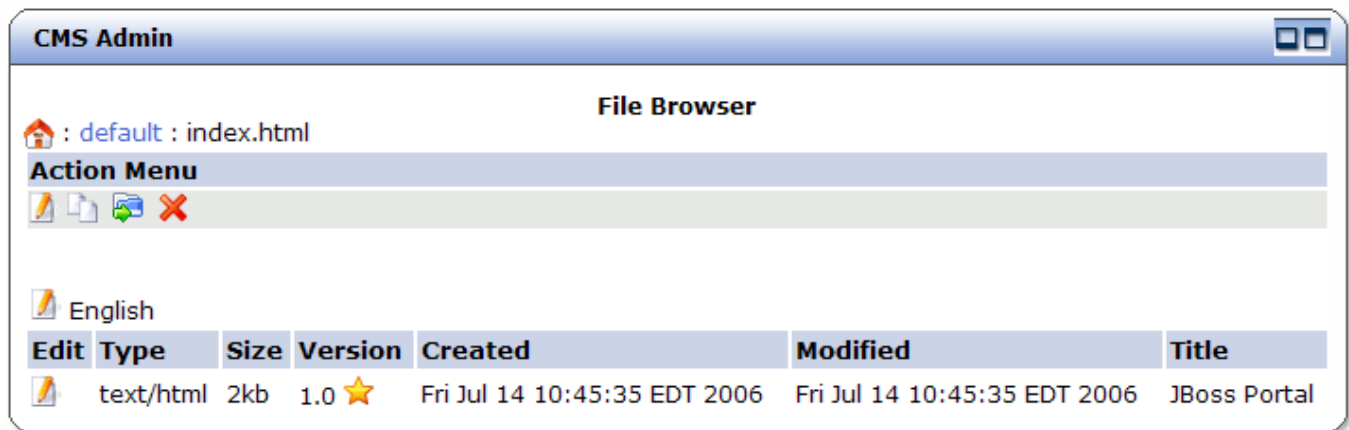


The export archive window allows a user to export entire directory structures as zip files. The system will aggregate all contents of a specific directory, and present to the user to download it. A user can select which source directory to export the resources from, by using the directory browser. Clicking the  icon expands the directory tree. Clicking on the name of the directory within the tree, sets it as the source directory for the export resource. Additionally, a user can set a language for the files to be exported.

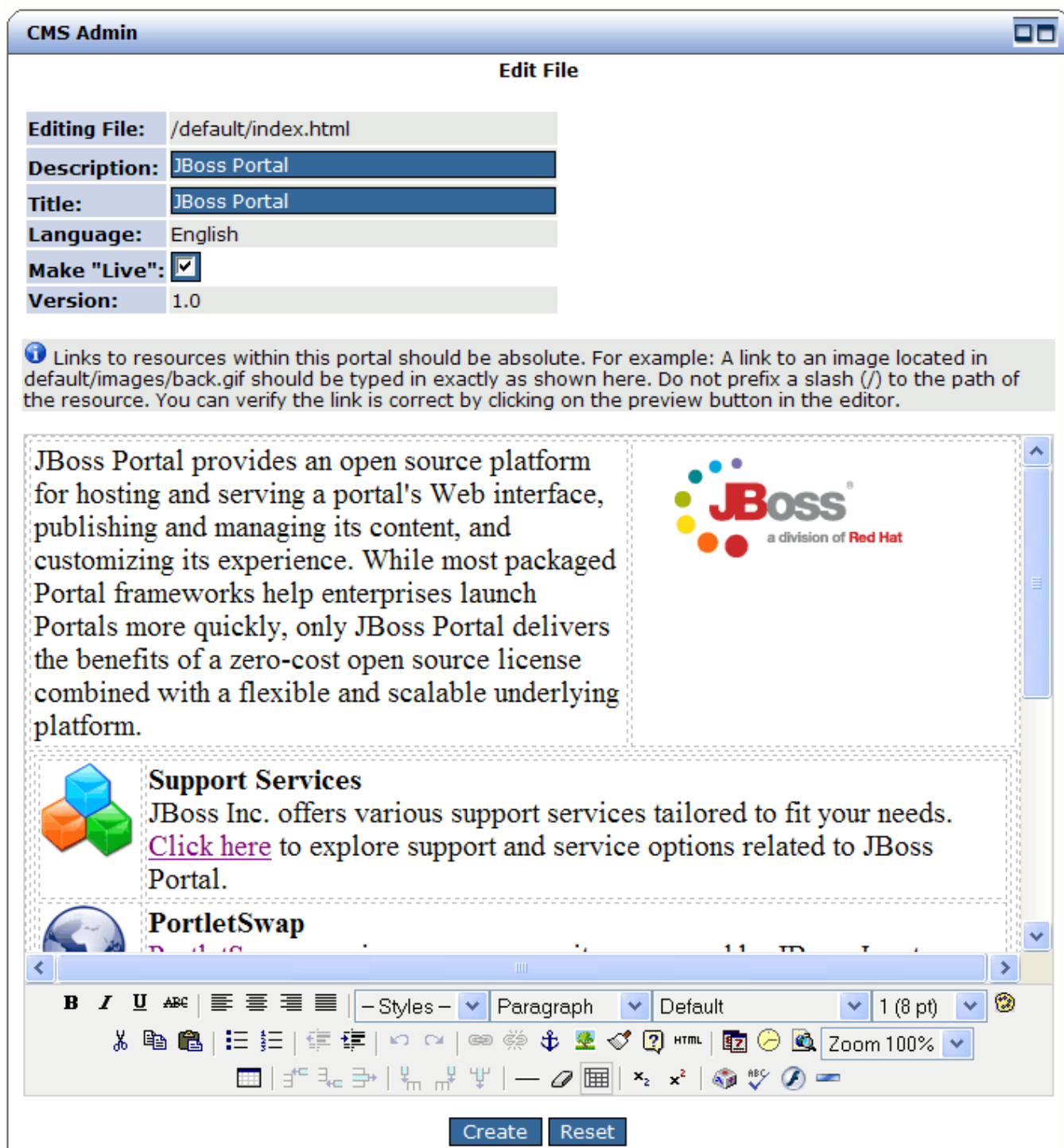
#### Note



Version information is not exported. Only versions labeled "Live" are exported!

### 3.2.11. Editing Text/HTML Files



Clicking on the icon displays the edit file dialog window with the embedded WYSIWYG editor and directory browser.



The edit file window allows a user to edit a text or HTML file using the embedded WYSIWYG HTML editor. The editor is a fully-functional HTML editor with a myriad of HTML functions. It also includes a preview  button and a source view  button.

A user may specify at this point if he would like to make the new edit "live", or available in production. Additionally, a user can set a title for the file that will be used as the portlet window title.

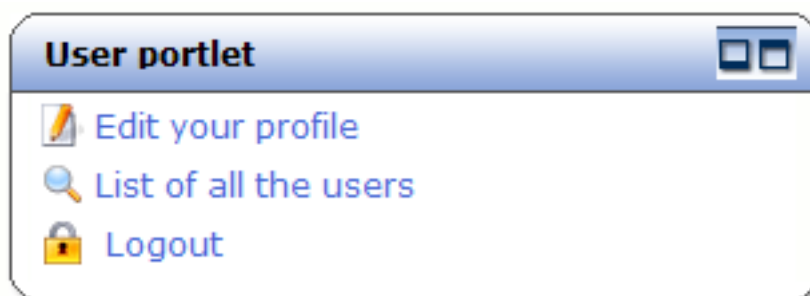
## Administration - Users and Roles

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### 4.1. Managing Users

#### 4.1.1. Introduction

This section covers the administrator functions made available by the UserPortlet. For end-user operation, see: Section 1.2.2.2 . Administrative functions are available once you are logged in with the proper credentials (admin/admin)



#### 4.1.2. Actions

All administrative functions are available after clicking on the ' *List of all users* ' link.

Managing users using the UserPortlet consists of:

1. Section 4.1.2.1
2. Section 4.1.2.2
3. Section 4.1.2.3

##### 4.1.2.1. Searching for Users



**User portlet**

[Go back to the user menu](#)

**Apply filters to the list**

Users per page  Username contains

Fullname	Username	Roles	Actions
N/A	bobo	Users	<a href="#">Profile</a> <a href="#">Roles</a>
N/A	user	Users	<a href="#">Profile</a> <a href="#">Roles</a>
N/A	admin	Administrators	<a href="#">Profile</a> <a href="#">Roles</a>
			<a href="#">Profile</a> <a href="#">Roles</a>

Typing a partial username in the form text field, allows you to search for usernames matching that criteria.

#### 4.1.2.2. Updating User Profiles

Clicking on the *Profile* link on the search page will allow you to edit a user's profile data, and even reset his password.

**Personal information**

[Go back to the user menu](#)

**Firstname**  Optional

**Lastname**  Optional

**Real e-mail**  Required

(This e-mail will not be public but is required. It will be used to send your password if you lose it)

**Fake e-mail**  Optional

(This e-mail will be public. Type what you'd like. Spam proof)

**Allow other users to view my real e-mail address** ☒

**Address of your personal website**  Optional

**Language**

**Time zone offset**

**Theme**

**ICQ id**  Optional

#### 4.1.2.3. Updating User Roles

Clicking on the *Roles* link in the search page allows you to modify the roles the specific user belongs to.



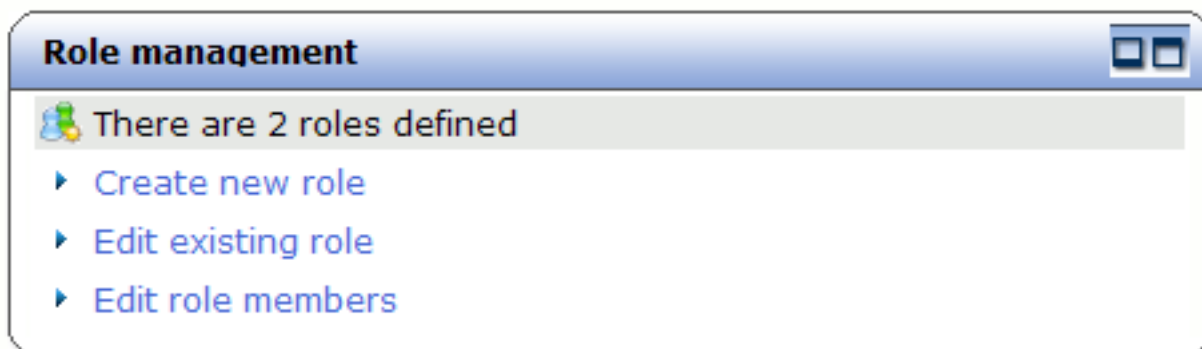
The screenshot shows a web portlet titled "User portlet" with a standard window control icon in the top right. Below the title bar, the text reads "Edit roles for the user: N/A 'bobo'". Underneath, there is a section labeled "Available roles" containing two checkboxes: "Administrators" (unchecked) and "Users" (checked). At the bottom of this section is a button labeled "Assign roles".

## 4.2. Managing Roles

### 4.2.1. Introduction

The role portlet is dedicated to create and edit roles. A role will be used to grant different permission level to different portlets, pages, or portal instances. A user can have several roles.

The RolePortlet is accessible once logged in as an administrator (admin/admin) from the Admin Page



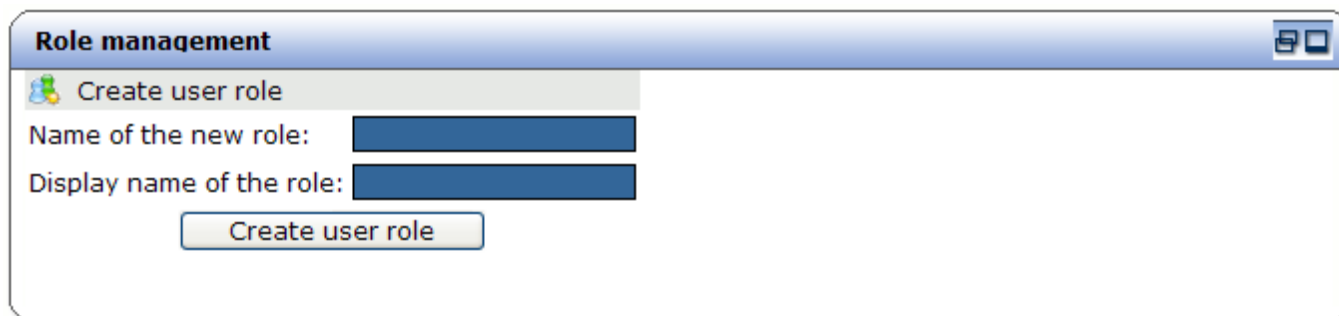
The screenshot shows a web portlet titled "Role management" with a standard window control icon in the top right. Below the title bar, there is a status bar with a small icon and the text "There are 2 roles defined". Below this, there is a list of three actions, each preceded by a blue right-pointing triangle: "Create new role", "Edit existing role", and "Edit role members".

### 4.2.2. Actions

Managing roles using the RolePortlet consists of:

1. Section 4.2.2.1
2. Section 4.2.2.2
3. Section 4.2.2.3

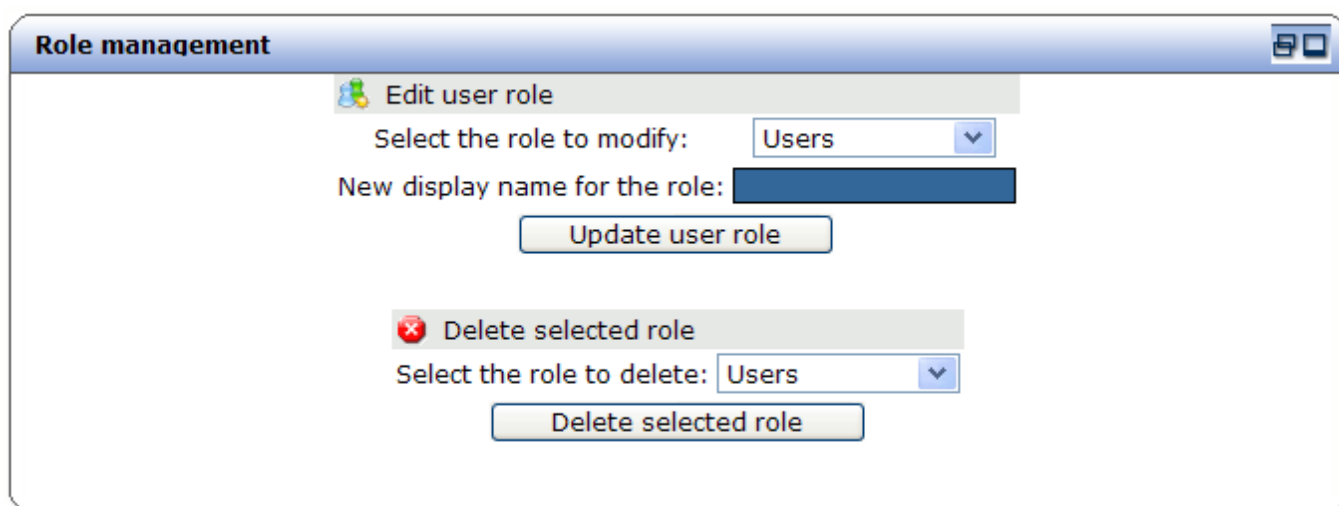
#### 4.2.2.1. Creating Roles



The screenshot shows a window titled "Role management" with a tab labeled "Create user role". Below the tab, there are two text input fields: "Name of the new role:" and "Display name of the role:". Below these fields is a button labeled "Create user role".

To create a new role, you need to define a short name that will be used for reference, and a display name for displaying to the user, for example `admin` would be a good name for the display name `Administrators`, changing the display name will not affect the security rules.

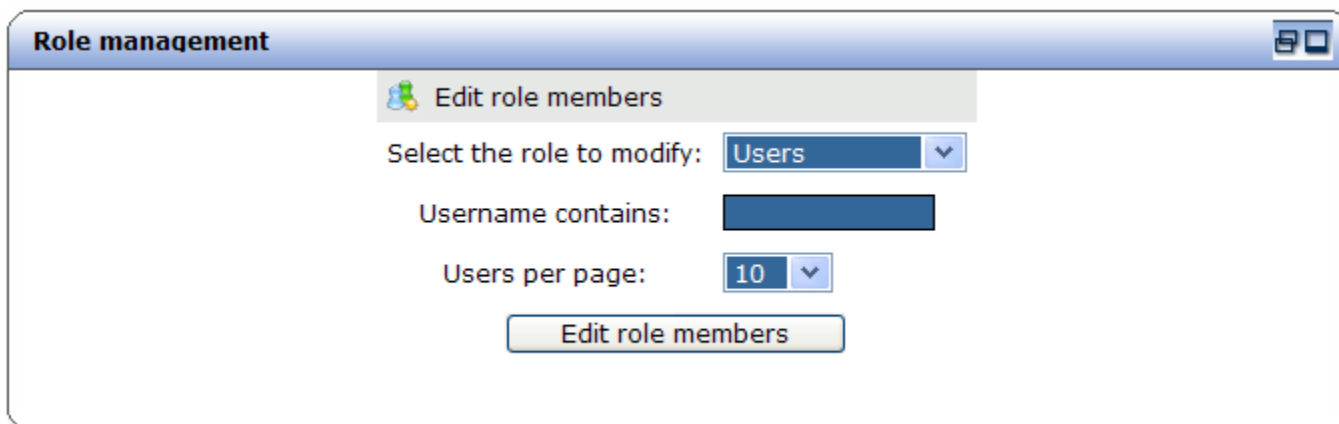
#### 4.2.2.2. Edit a role



The screenshot shows a window titled "Role management" with two tabs: "Edit user role" and "Delete selected role". The "Edit user role" tab is active, showing a dropdown menu "Select the role to modify:" with "Users" selected, a text input field "New display name for the role:", and a button "Update user role". The "Delete selected role" tab is also visible, showing a dropdown menu "Select the role to delete:" with "Users" selected and a button "Delete selected role".

While editing a role, you just need to pick an existing role then change the display name. Additionally, you can delete existing roles from this screen.

#### 4.2.2.3. Editing Role Members



The screenshot shows a window titled "Role management" with a tab labeled "Edit role members". Below the tab, there is a dropdown menu "Select the role to modify:" with "Users" selected, a text input field "Username contains:", a dropdown menu "Users per page:" with "10" selected, and a button "Edit role members".

Allows for an administrator to search and modify the members' assigned roles.