

**JBoss Portal 2.7.0**

# **User Guide**

**July 2008**

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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 \(Portlet 1.0\)](http://www.jcp.org/en/jsr/detail?id=168) [http://www.jcp.org/en/jsr/detail?id=168] and [JSR-286 Portlet Specification \(Portlet 2.0\)](http://www.jcp.org/en/jsr/detail?id=286) [http://www.jcp.org/en/jsr/detail?id=286], 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://jboss.com/opensource/lgpl/faq) [http://jboss.com/opensource/lgpl/faq] open source license, and the JBoss Enterprise Portal Platform is supported by [JBoss Enterprise Middleware Professional Support and Consulting](http://www.jboss.com/services/index) [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 Enterprise Middleware developers, and community contributors.

The JBoss Portal framework and architecture include the portal container, and support 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 Resources:

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

The JBoss Portal team encourages you to use this guide to install and configure JBoss Portal. If you encounter any configuration issues or simply want to take part in our community, we would love to hear from you in our forums.

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## Feature List

The following list details features found in this release of JBoss Portal. For a technical view of the JBoss Portal features, refer to the [Project Roadmap and Task List](http://jira.jboss.com/jira/browse/JBPORTAL) [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.
- **Database Agnostic:** works with any RDBMS supported by Hibernate.
- **Java™ Authentication and Authorization Service (JAAS):** custom authentication via JAAS login modules.
- **Caching:** utilizes render-view caching for improved performance.
- **Clustering:** cluster support allows the 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.

### Single Sign On

- **Leverages Apache Tomcat and JBoss Single Sign On (SSO) solutions.**
- **Integrates with Java Open Single Sign-On (JOSSO) and Central Authentication Service (CAS) out of the box. Experimental support for the Open Web SSO project (OpenSSO).**

### LDAP

- **Connect to virtually any LDAP server.**
- **Integrates with Sun™ Active Directory and OpenLDAP out of the box. Experimental support for Microsoft® Active Directory®.**

### Supported Standards

- **Portlet Specification and API 1.0 (JSR-168).**
- **Portlet Specification and API 2.0 (JSR-286).**
- **Content Repository for Java™ technology API (JSR-170).**
- **JavaServer™ Faces 1.2 (JSR-252).**
- **JavaServer™ Faces 2.0 (JSR-314).**

- **Java Management Extension (JMX™) 1.2.**
- **Web Services for Remote Portlets (WSRP) 1.0:** refer to [WSRP support in JBoss Portal](http://docs.jboss.com/jbportal/v2.6.5/referenceGuide/html/wsrp.html#wsrp_support) [http://docs.jboss.com/jbportal/v2.6.5/referenceGuide/html/wsrp.html#wsrp\_support] for further details.
- **Full J2EE™ 1.4 compliance when used with JBoss Application Server.**

### Portal and Portal Container

- **Multiple Portal Instances:** the ability to have multiple portal instances running inside one portal container.
- **IPC:** the Inter-Portlet Communication API enables portlets to create links to other objects, such as pages, portals, and windows.
- **Dynamic:** the ability for administrators and users to create and destroy objects such as portlets, pages, portals, themes, and layouts at runtime.
- **Internationalization:** the ability to use internationalization resource files for every portlet.
- **Pluggable Services:** with authentication performed by the servlet container and JAAS, it is possible to swap the authentication scheme.
- **Page-based Architecture:** allows the grouping and division of portlets on a per-page basis.
- **Existing Framework Support:** portlets utilizing Apache Struts, Spring Web MVC, Sun JSF-RI, AJAX, and Apache MyFaces are supported.

### Themes and Layouts

- **Swapping Themes and Layouts:** new themes and layouts containing images can easily be deployed in WAR archives.
- **Flexible API:** the Theme and Layout APIs 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 and Validation:** configurable registration parameters allow user email validation before activation.
- **Workflow:** ability to define your own jBPM workflow on user registration.
- **User Log In:** makes use of servlet container authentication.
- **Create and Edit Users:** ability for administrators to create and edit user profiles.



- 
- **Create and Edit Roles:** ability for administrators to create and edit roles.
  - **Role Assignment:** ability for administrators to assign users to roles.
  - **CAPTCHA Support:** distinguish between humans and machines when registering.

### Permissions Management

- **Extendable Permissions API:** allows custom portlet permissions based on role definition.
- **Administrative Interface:** allows permission 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.
- **Database and File System Store Support:** configure the content store for either a file system or an RDBMS.
- **External Blob Support:** configurable content store, allowing large blobs to reside on a file system, and content node references and properties to reside in an RDBMS.
- **Version and History Support:** all content edited and created is auto-versioned with a history of edits, that can be viewed at any time.
- **Content Serving Search-engine-friendly URLs:** `http://your-domain/portal/content/index.html` (does not apply to portlet actions).
- **No Long Portal URLs:** serve binaries with simple URLs (`http://your-domain/files/products.pdf`).
- **Multiple HTML Portlet Instance Support:** allows 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, delete, copy, and upload files.
- **Embedded Directory-browser:** when creating, moving, deleting, or copying files, administrators can 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:** the HTML editor contains a WYSIWYG mode, preview functionality, and HTML source editing mode. HTML commands support tables, fonts, zooming, image and URL linking, flash movie support, bullet and numbered list, and dozens more.

## Feature List

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- **Editor Style Sheet Support:** to easily chose classes, the WYSIWYG editor displays the current portal style sheet.
- **Internationalization Support:** content can be attributed to a specific locale, and then served to the user based on his or hers Web browser settings.
- **Workflow Support:** basic submit for review and approval process.

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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) [http://labs.jboss.com/portal/jbossportal/docs/index.html] .



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## Acknowledgments

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

Specifically:

- Luca Stancapiano, Luc Boudreau and Anton Borisow for their Italian, Canadian French and Russian localization contributions.
- Antoine Herzog and Peter Johnson for helping in the forums.
- Mark Fernandes and Paul Tamaro from Novell, for their hard work in supplying the portal project with usable and attractive themes and layouts in the 2.4 version of JBoss Portal.
- Martin Holzner from Novell, for his work on themes in the 2.4 version of JBoss Portal.
- Kev "kevs3d" Roast for supplying us with two working portlets that integrate existing frameworks in to the portal: Sun JSF-RI and Spring MVC portlets.
- Swarn "sdhaliwal" Dhaliwal for supplying us with the Struts-Bridge, that will allow for existing Apache Struts applications to work with JBoss Portal.
- A few Red Hat employees: Remy Maucherat for Apache Tomcat configuration, Magesh Kumar Bojan and Martin Putz for always being there to help our customers, Prabhat Jha for making sure that JBoss Portal runs great everywhere, Murray Mc Allister for his work on the doc, Noel Rocher for his contributions and early feedback on JBoss Portal 2.6, James Cobb for the renaissance theme and many others !
- The JBoss Labs (<http://www.jboss.org>) team for building a great infrastructure on top of JBoss Portal 2.6, providing very useful feedback, and giving us the initial Drag and Drop implementation.
- Everyone in general who participates on the code, in the forums and on the Wiki.

Contributions of any kind are always welcome. You can contribute by providing ideas, filing bug reports, producing code, designing a theme, writing documentation, and so on. If you think your name is missing from this page, please let us know.

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# JBoss Portal Basics

Roy Russo

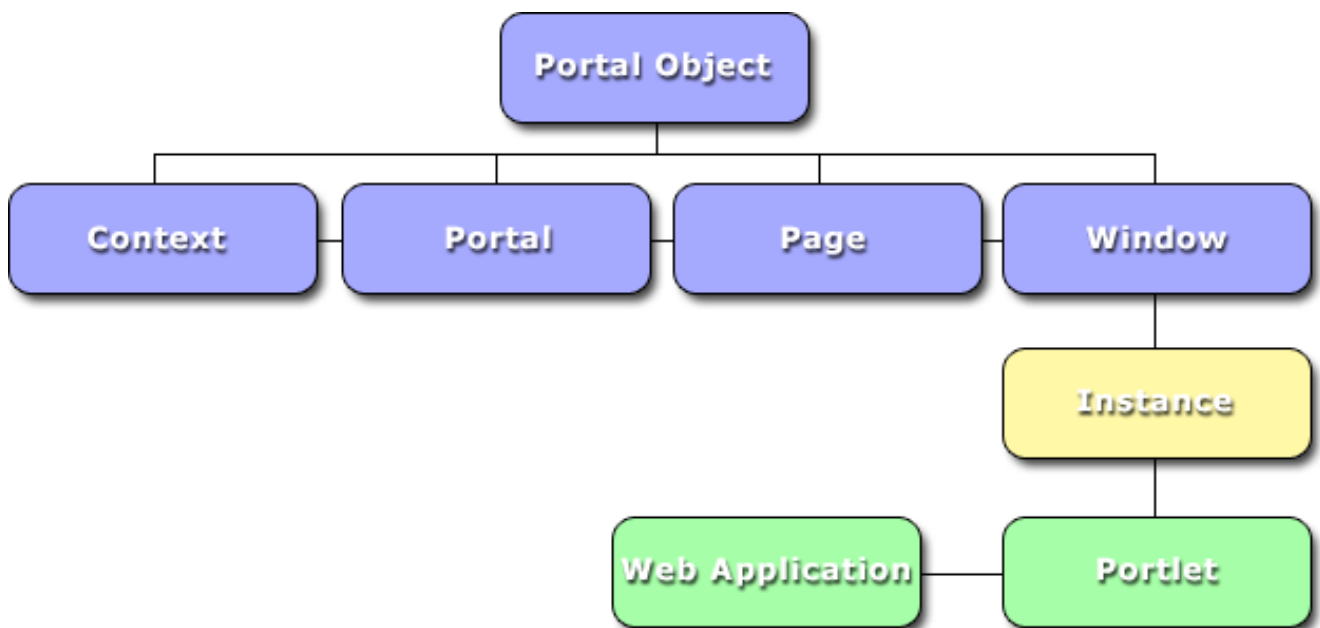
Chris Laprun

## 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 reached at <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. Pages

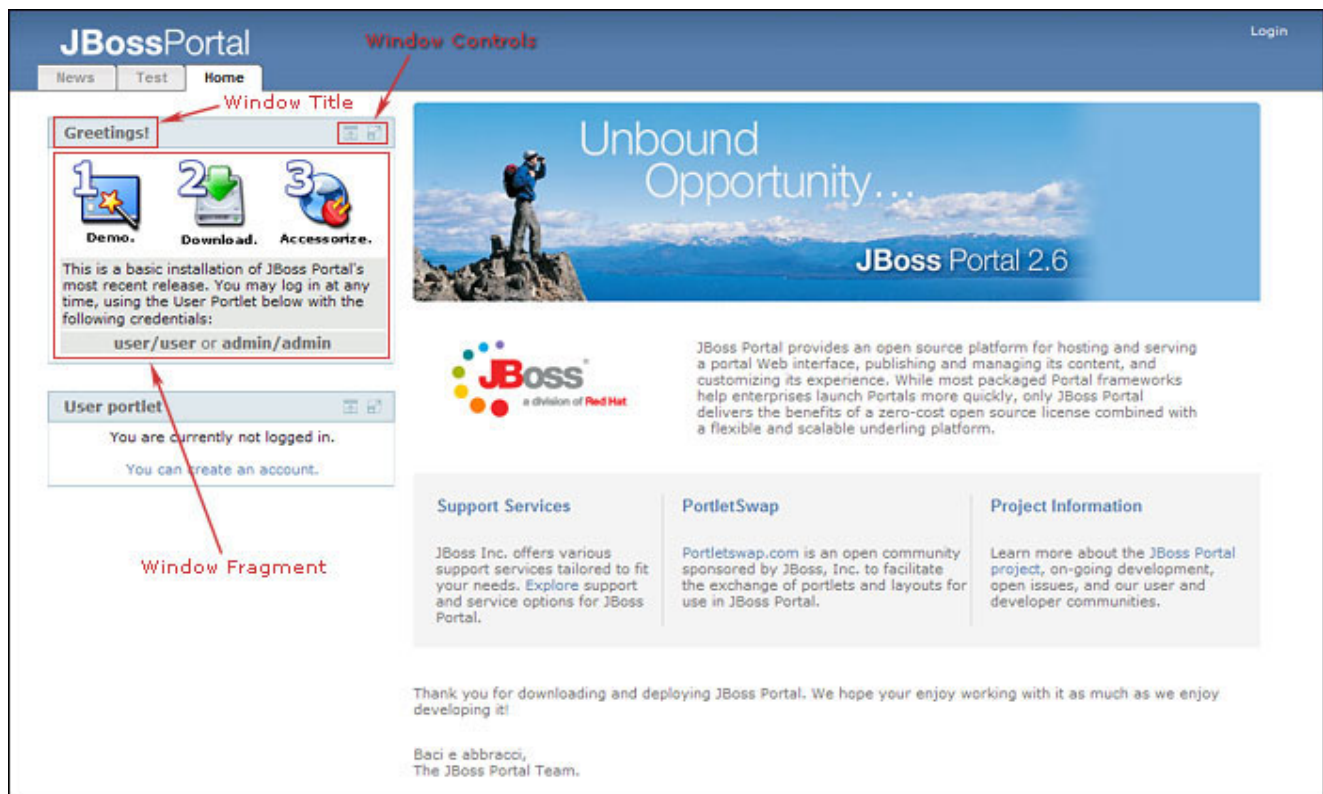
A Portal Page is an aggregator of Portlet Windows. It is generated by the portal, during the response phase. During this phase, the portal aggregates all of the HTML markup created by the individual portlets, decorates them with window controls, and presents them to the user as a consolidated page.

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 reached at `http://localhost:8080/portal/portal/default/default` [`http://localhost:8080/portal/portal/default`]. Likewise, the News Page in a default install can be reached at `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, “Default Portal installation”](#)

### 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:** Generated HTML markup produced by the portlet on the server-side.



- **Window Controls:** Window controls are divided into two categories and control different aspects of how the user can impact the generated markup. Each window control can be clicked on to interact with the window in specific ways. **Window State** icons control how much room the window will take on the page and how much markup will be shown. **Portlet Mode** icons, on the other hand, control the mode in which the portlet operates, thus impacting the type of generated markup. Note that not all portlets support all defined window states and/or portlet modes.

- **Window State icons and their meaning:**



**(Normal)** - Normal window state, is the most common state for portlets (portlet in the above image are in the normal window state). The portlet window will occupy only enough space to show the portlet content on the page.



**(Minimized)** - The portlet is instructed to render minimal-to-no markup.



**(Maximized)** - The portlet window can occupy as much space of real estate on the page.

- **Portlet Modes and their meaning:** Portlet modes are not always available (it depends on the portlet support for a given mode). Moreover, the Edit mode is only available to logged-in users, as in this mode, the portlet preferences can be modified to be individually suited to a particular user's needs.



**(Edit)** - Only visible to logged-in users. Allows a logged-in user to customize the portlet's preferences.



**(Return to View mode)** - The button labeled 'Cancel' is only visible when a user is logged in and the portlet associated to the current window is in the Edit mode. This replaces the Edit button so the user understands that by clicking it she will leave the "Edit Mode" and reverting back to "View Mode". Portlets are by default in View mode.



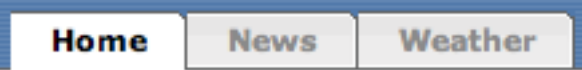
**(Help)** - Allows a user to access helpful information about the portlet, if it provides it (which is recommended).

## 1.2. Default Portal installation

This section will take a quick look at the default Portal installation and the pages and portlets that come with it.

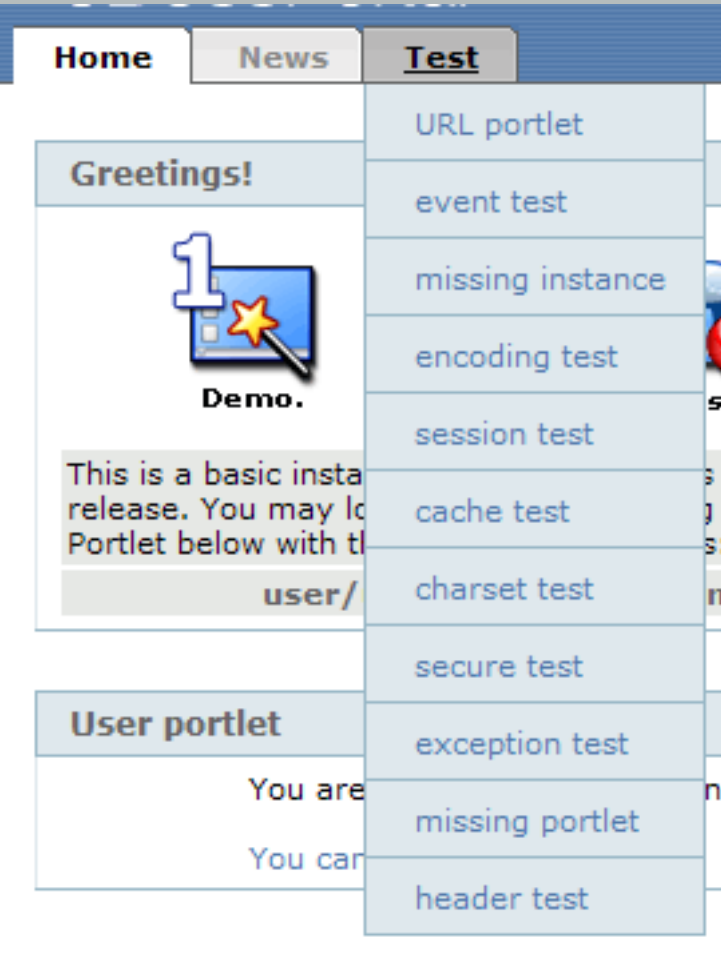
### 1.2.1. Default Portal Pages

Three pages are available in the default Portal: Home, News and Weather. You can access pages either by entering the page URL in your browser location bar, as shown in [Section 1.1.2, “Pages”](#), or by clicking the tab associated to the page in the Navigation Tabs at the top of the page.



**Note**

Navigation tabs support sub-page navigation as well. By hovering over a tab with child Pages, it will display a flyout menu for those subpages:

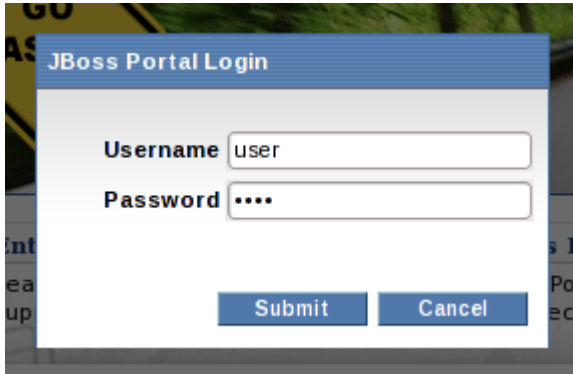


There are no pages with subpages in the default Portal installation.

While you can use a Portal anonymously, it is much more interesting to do so while logged in, as you get the opportunity to customize the content you want to see or even create your own personal Dashboard, as explained in [Section 1.3, “Personal Dashboard”](#).

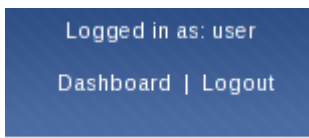
## 1.2.2. Logging in to the Portal

Logging in to the portal is accomplished by clicking the *Login* link at the top-right of the portal page. Portal will present you with a logging screen where you can enter your credentials:

A screenshot of the JBoss Portal Login dialog box. The dialog has a blue header with the text "JBoss Portal Login". Below the header, there are two input fields: "Username" with the text "user" and "Password" with four dots. At the bottom of the dialog, there are two buttons: "Submit" and "Cancel".

The default Portal installation defines two users: a regular user with no special privileges (login: `user`, password: `user`) and an administrator user who can alter Portal's content (login: `admin`, password: `admin`).

Once logged in, the top-right menu will change so you can then navigate to your personal dashboard or log out. If you have access to other portal instances, they will be shown here as well.



### Note

If you login as an administrator, you will also be presented with a link to the *Admin* portal.

### 1.2.3. Home Page

#### 1.2.3.1. Greetings Portlet



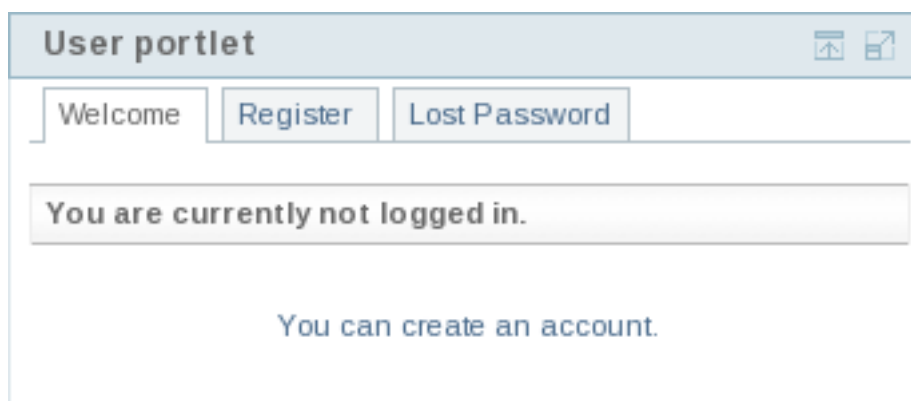
Displays hard-coded links to downloading JBoss Portal, downloading portlets from [PortletSwap](http://www.portletswap.com) [http://www.portletswap.com], and the live online JBoss Portal demo. It also contains default authentication information on logging in, as well as a link to the official Portal documentation.

#### 1.2.3.2. Identity User Portlet

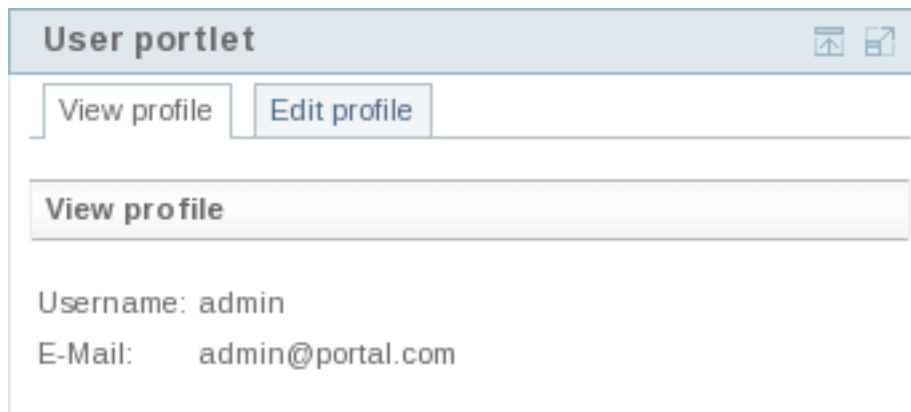


#### Note

Administrators should view [Section 4.1, "Managing Users"](#) for managing the portal user base. Only user operations are covered in this section...



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



The screenshot shows a web interface titled "User portlet". At the top right of the portlet are two small icons: a magnifying glass and a document. Below the title bar, there are two buttons: "View profile" and "Edit profile". A horizontal line separates this section from the main content area. The main content area has a header "View profile" in a light gray box. Below this, the user's details are displayed: "Username: admin" and "E-Mail: admin@portal.com".

The Identity User Portlet allows a user to:

- **Create a new account**

Create a new account by clicking on the "*Register*" link in the navigation of the portlet, when not logged. A User can then fill in the necessary information to create an account on the system:

User portlet

Welcome

Register

Lost Password

Basic user information

Username \*

E-Mail \*

Password \*

Confirm Password \*

h q t m a ! s

Verify captcha \*

\* indicates a required field.

Submit

Cancel

- **Lost password**

Already registered users can request a new password by clicking on the *"Lost password"* link in the navigation of the portlet. Therefore the user needs to fill in his user name to receive an e-mail with his new login credentials.

User portlet

Welcome

Register

Lost Password

Forgot your login data?

Please enter your username to reset your password

Username

t a e s e d

Verify captcha \*

Submit

Cancel

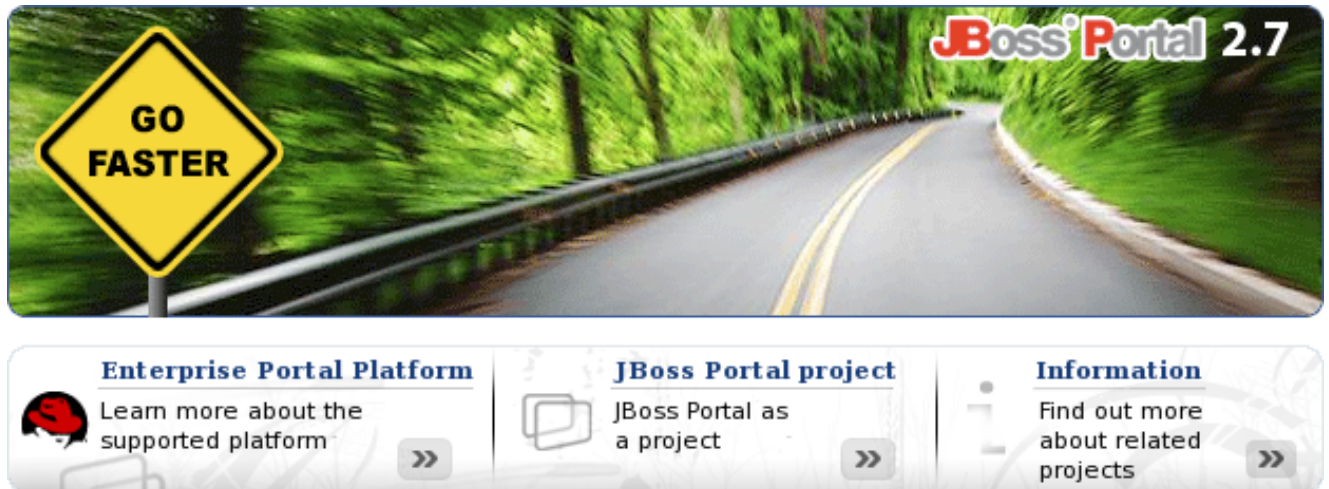
- **View profile**

The default page after login is the view profile, which shows a summary of the most important properties of a user.

- **Edit personal information**

A user has the ability to edit his personal information, change his password and e-mail address at any time by clicking on the *"Edit profile"* link, when logged in.

### 1.2.3.3. CMS Portlet



Portal includes a basic Content Management System (CMS). Portal provides a CMS portlet which allows users to navigate the CMS content (static html, images, binary files, etc.).

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 read [Chapter 3, Administration - Content Management System](#) for managing the data in the CMS.



## 1.2.4. News Page

**JBossPortal**

[Home](#)
[News](#)
[Weather](#)

Logged in as: user  
[Dashboard](#) | [Copy to my dashboard](#) | [Logout](#)

News Feeds
 [Edit](#)

**JBoss Portal -**

- ▶ **Yet another iPhone impact analysis**  
Christophe Laprun - Wed, 27 Jun 2007 13:33:00 +0000
- ▶ **JBoss Portal CR3 release**  
Julien Viet - Fri, 22 Jun 2007 10:30:00 +0000
- ▶ **JSF is great but...**  
Julien Viet - Fri, 22 Jun 2007 00:32:00 +0000
- ▶ **JIRA missing basic features**  
Julien Viet - Thu, 21 Jun 2007 23:54:00 +0000
- ▶ **An implementation of partial portal page refresh**  
Julien Viet - Tue, 19 Jun 2007 15:27:00 +0000
- ▶ **LDAP support tutorial for JBoss Portal 2.6 (part 1)**  
Boleslaw Dawidowicz - Fri, 08 Jun 2007 10:18:00 +0000
- ▶ **Portal or not portal: When to go with a JSR 168 Portal ? Part 2**  
Thomas Heute - Fri, 01 Jun 2007 16:40:00 +0000
- ▶ **Portal or not portal: When to go with a JSR 168 Portal ? Part 1**  
Thomas Heute - Wed, 23 May 2007 13:33:00 +0000
- ▶ **LDAP support in JBoss Portal 2.6**  
Boleslaw Dawidowicz - Tue, 15 May 2007 20:59:00 +0000
- ▶ **Portlet best practices #1**  
Julien Viet - Mon, 14 May 2007 22:32:00 +0000
- ▶ **Portlet Book free chapter Review**  
Thomas Heute - Thu, 10 May 2007 03:24:00 +0000
- ▶ **JBoss Portal talk in San Diego, CA on May 11th**  
Thomas Heute - Mon, 07 May 2007 08:26:00 +0000
- ▶ **JBoss Portal 2.6 CR2 Release**  
Julien Viet - Wed, 02 May 2007 13:41:00 +0000

News Feeds
 [Edit](#)

**Yahoo! Finance: RHT News - Latest Financial News for RED HAT INC**

- ▶ **Stocks Quiet Ahead of Fed (at TheStreet.com)**  
Thu, 28 Jun 2007 13:57:25 GMT
- ▶ **Red Hat Riding With the Wind: Fool by Numbers (at Motley Fool)**  
Thu, 28 Jun 2007 13:25:19 GMT
- ▶ **Futures Point to Higher Open (at TheStreet.com)**  
Thu, 28 Jun 2007 13:16:37 GMT
- ▶ **RPT-Red Hat CEO says he talked patents with Microsoft (at Reuters)**  
Thu, 28 Jun 2007 12:47:13 GMT
- ▶ **[video] Premarket Report: COF, RHT (at TheStreet.com)**  
Thu, 28 Jun 2007 12:46:57 GMT
- ▶ **Stocks Rise Ahead of Fed (at TheStreet.com)**  
Thu, 28 Jun 2007 11:42:25 GMT
- ▶ **Red Hat Q1 Income Up 23%, Misses on Cash Flow (Seeking Alpha)**  
Thu, 28 Jun 2007 10:09:12 GMT

The News Page contains 2 portlets displaying news from common internet feeds. An open internet connection on the server-side is therefore required for them to operate. ;-)

## 1.2.4.1. News Portlet

News Feeds

Edit

## JBoss Portal -

- ▶ **Yet another iPhone impact analysis**  
Christophe Laprun - Wed, 27 Jun 2007 13:33:00 +0000
- ▶ **JBoss Portal CR3 release**  
Julien Viet - Fri, 22 Jun 2007 10:30:00 +0000
- ▶ **JSF is great but...**  
Julien Viet - Fri, 22 Jun 2007 00:32:00 +0000
- ▶ **JIRA missing basic features**  
Julien Viet - Thu, 21 Jun 2007 23:54:00 +0000
- ▶ **An implementation of partial portal page refresh**  
Julien Viet - Tue, 19 Jun 2007 15:27:00 +0000
- ▶ **LDAP support tutorial for JBoss Portal 2.6 (part 1)**  
Boleslaw Dawidowicz - Fri, 08 Jun 2007 10:18:00 +0000
- ▶ **Portal or not portal: When to go with a JSR 168 Portal ? Part 2**  
Thomas Heute - Fri, 01 Jun 2007 16:40:00 +0000
- ▶ **Portal or not portal: When to go with a JSR 168 Portal ? Part 1**  
Thomas Heute - Wed, 23 May 2007 13:33:00 +0000
- ▶ **LDAP support in JBoss Portal 2.6**  
Boleslaw Dawidowicz - Tue, 15 May 2007 20:59:00 +0000
- ▶ **Portlet best practices #1**  
Julien Viet - Mon, 14 May 2007 22:32:00 +0000
- ▶ **Portlet Book free chapter Review**  
Thomas Heute - Thu, 10 May 2007 03:24:00 +0000
- ▶ **JBoss Portal talk in San Diego, CA on May 11th**  
Thomas Heute - Mon, 07 May 2007 08:26:00 +0000
- ▶ **JBoss Portal 2.6 CR2 Release**  
Julien Viet - Wed, 02 May 2007 13:41:00 +0000

The News Portlet retrieves an RSS news feed from a URL and displays it as HTML to the user.

Additionally, a logged-in user is able to modify her preference in RSS feed source by using the Portlet's Edit Mode (click

### Edit

). Once the form is submitted, this property will be saved in the user's preference, so she will always see the same news source, when logged in.

News Feeds

Cancel

Change News Feed URL:

submit



**Note**

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




## 1.2.5. Weather Page

This page contains a portlet displaying the weather forecast for a specific location.

### 1.2.5.1. Weather Portlet

**Weather Portlet** Edit  

**Miami, FL, US**

Currently	Fri	Sat
		
Mostly Cloudy	Isolated Thunderstorms	Scattered Thunderstorms
82F	77F/86F	76F/87F

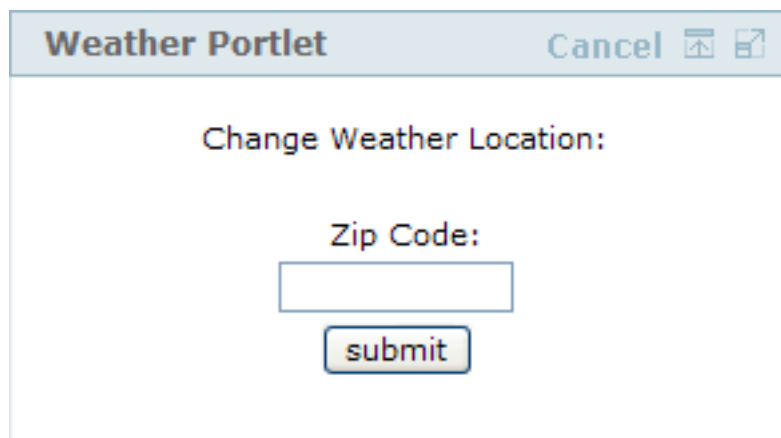
[Complete Forecast](#)

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 logged-in user is able to modify her preference in location by using the Portlet's Edit Mode (click

#### Edit

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



A dialog box titled "Weather Portlet" with a "Cancel" button and window control icons. The main text says "Change Weather Location:". Below this is a label "Zip Code:" followed by a text input field and a "submit" button.

**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:



A screenshot of the Yahoo! News Weather page. At the top is the "YAHOO! NEWS Weather" logo. Below it is a navigation bar with buttons for "Home", "U.S.", "Business", "World", "Entertainment", "Photos", "Opinion", "Local News", "Odd News", and "Community". A "Search:" label is followed by a search input field. Below the navigation bar is the "The Weather Channel" logo and the word "Weather". At the bottom, there is a form titled "Enter city or zip code:" with a text input field containing "Marseille" and a "Go" button.

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

---

**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 (*FRXX0059* in this case):



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



Weather Portlet Cancel

Change Weather Location:  
Zip Code:

Hit *submit*...

Weather Portlet Edit

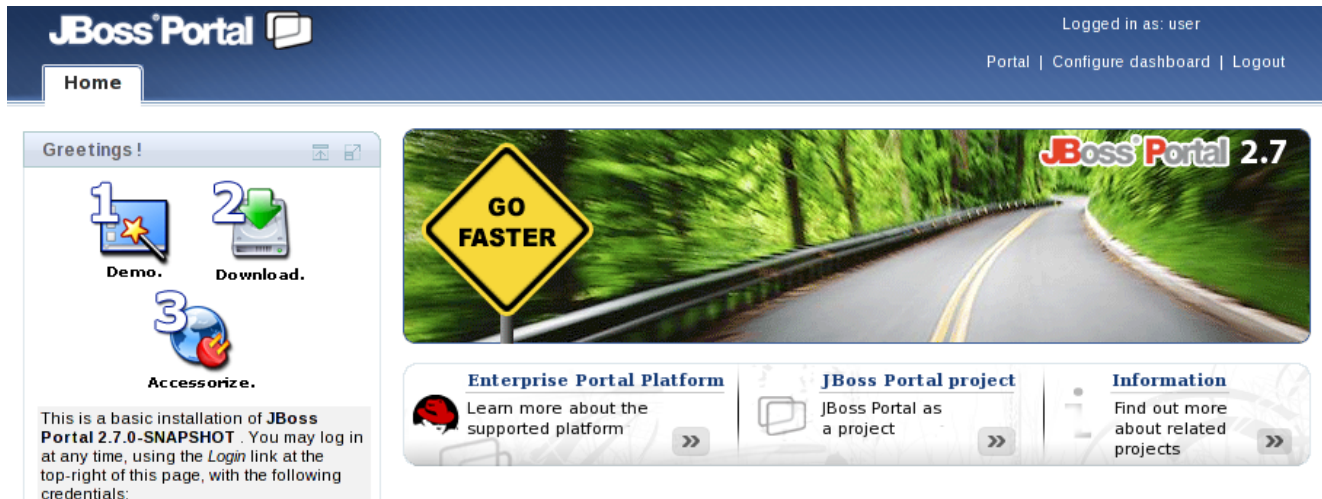
Marseille, , FR

Currently	Fri	Sat
		
Partly Cloudy	Sunny	Sunny
81F	68F/85F	70F/89F

[Complete Forecast](#)

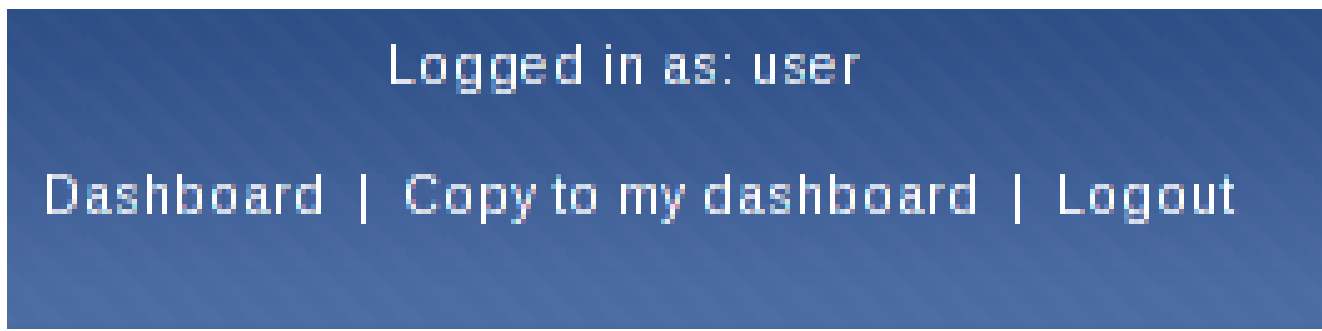
## 1.3. Personal Dashboard

Once logged in, all users/administrations of the portal can access a personal dashboard by clicking the *Dashboard* link at the top-right of the portal page. Note how the links changed.



The personal dashboard allows users to customize their portal pages however they like, and all changes will be persisted... so the next time the user logs in to his dashboard, he will see the previous changes he made. While navigating any of the dashboard pages, a user will be able to drag and drop portlet windows to any location, if the administrator allows this functionality. Changes made in this fashion will also be persisted.

It is also possible to copy the content of a shared page to your dashboard so you can customize it to your liking. Just click the '*Copy to my dashboard*' link at the top right of the page. This will clone the page and add it to your personal dashboard as a page with the same name.



### 1.3.1. Configuring your personal dashboard

You can configure your dashboard by using the top-right menu item labeled '*Configure dashboard*'.

**Personal Dashboard Editor**

Use this page to manage the content and appearance of your dashboard pages. You can control the page titles, column layouts, page themes, and add, order, or remove portlets.

**Create a New Page:**  
Page name:

Create a new page

Currently editing page default  
Select:

Select the page being currently edited

**Theme and Layout**  
Apply a theme to your dashboard, or select the number of columns for the layout.  
  
Choose a layout:  
   
  
Choose a theme:  
   
  
Change the theme and layout for your dashboard

**Content Definition**  
Define a name for the window of content (optional):  
Window Name:   
  
Select the type of content that will be added to the page:  
Content Type:   
  
Select content that will be added to the page:  
**Portlet instance associated to this window:**  
CatalogPortletInstance  
CMSAdminPortletInstance  
DashboardConfigPortletInstance  
JSPPortletInstance  
NewsPortletInstance  
NewsPortletInstance2  
RolePortletInstance  
UserPortletInstance  
WeatherPortletInstance

**Page Layout**  
  
center Region  
 CMSWindow     
  
left Region  
 JSPPortletWi  
UserPortletW     
  
Add and position portlets to the currently selected page

### 1.3.1.1. Dashboard-wide operations

You can select a theme and layout for your dashboard by selecting from the available ones and then clicking on select in the *Theme and Layout* form.

You can also create new pages that will be added to your dashboard by simply entering the name of the new page in the *Create New Page* form at the top left of the screen.



#### Note

- Page names must be unique.
- Page names cannot be blank.



Upon creating a new page, the screen will refresh and allow a user to customize the new page.

You may delete dashboard pages at any time, by first selecting the page you want to delete using the popup menu at the top of the screen and then clicking the *Delete this page* button at the bottom of the screen. We will note that users are not able to delete the default dashboard page.

**Currently editing page test**  
 Select: test

**Theme and Layout**  
Apply a theme to your dashboard, or select the number of columns for the layout.

---

Choose a layout:  
default Select

Choose a theme:  
renaissance Select

**Content Definition**

Define a name for the window of content (optional):  
 Window Name:

Select the type of content that will be added to the page:  
 Content Type: portlet

Select content that will be added to the page:  
**Portlet instance associated to this window:**

- CatalogPortletInstance
- CMSAdminPortletInstance
- DashboardConfigPortletInstance
- JSPPortletInstance
- NewsPortletInstance
- NewsPortletInstance2
- RolePortletInstance
- UserPortletInstance
- WeatherPortletInstance

**Page Layout**

center Region Add

left Region Add

Delete this Page  
You cannot undo this action!



## Warning

Deleted pages are NOT recoverable. This change is permanent!

### 1.3.1.2. Managing Portlets on a page

You can add, remove and reorder portlets on a dashboard page to adapt your environment to your liking. To do so, just select the page you want to modify using the page popup selector and use the portlet management form. We will not explain how to use it here as it is similar to the page layout functionality of the Admin portal, which we will look at in [Section 2.2.1.3, “Looking at a page configuration”](#)

Content Definition	Page Layout
<p>Define a name for the window of content (optional):</p> <p>Window Name: <input type="text"/></p> <hr/> <p>Select the type of content that will be added to the page:</p> <p>Content Type: <input type="text" value="portlet"/></p> <hr/> <p>Select content that will be added to the page:</p> <p>Portlet instance associated to this window:</p> <div><div>CatalogPortletInstance</div><div>CMSAdminPortletInstance</div><div>DashboardConfigPortletInstance</div><div>JSPPortletInstance</div><div>NewsPortletInstance</div><div>NewsPortletInstance2</div><div>RolePortletInstance</div><div>UserPortletInstance</div><div>WeatherPortletInstance</div></div>	<p>center Region</p> <div><div>Add</div><div></div><div>Up</div><div>Down</div><div>Delete</div></div> <hr/> <p>left Region</p> <div><div>Add</div><div></div><div>Up</div><div>Down</div><div>Delete</div></div>

## 1.4. Admin Portal



### Note

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

JBoss Portal

Logged in as: admin  
Dashboard | Portal | Logout

CMS Members WSRP **Admin**

Portal Objects Portlet Instances Portlet Definitions Dashboards

**Portals**

Manage Portals

Properties

Manage sub-portals

Create a portal named:  **Create portal**

Portal	Actions
admin	Security   Properties   Theme   Make Default
default	Security   Properties   Theme   Rename   Default
template	Security   Properties   Theme   Make Default

Powered by JBoss Portal

The Admin Portal'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, "Managing Users"](#), [Section 4.2, "Managing Roles"](#))
- Content Management System (See: [Chapter 3, Administration - Content Management System](#))
- Portal Objects (themes, layouts, portal instances, pages, windows, security, and deployed portlets) (See: [Chapter 2, Administration - Portal Object Management \(Dynamicity\)](#))
- WSRP (See the [WSRP chapter](#) [<http://docs.jboss.com/jbportal/v2.6/reference-guide/en/html/wsrp.html>] in the Reference Guide for more information)



# Administration - Portal Object Management (Dynamicity)

Chris Laprun

## 2.1. Introduction



### Note

Viewing the Management Portlet is accomplished by logging in as an admin (admin/admin) and navigating to the Admin portal (see [Section 1.4, “Admin Portal”](#)).

The concept of dynamicity refers to the fact all portal objects can be dynamically 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.

## 2.2. Management Portlet



### Note

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

The management portlet provides a two-part interface: tabs, at the top, corresponding to the different sections that can be managed; and the main area under it, displaying the current information for the selected tab.

JBoss Portal

Logged in as: admin

Dashboard | Portal | Logout

CMS Members WSRP Admin

Portal Objects Portlet Instances Portlet Definitions Dashboards

Portals

Manage Portals

Properties

Manage sub-portals

Create a portal named:  Create portal

Portal	Actions
admin	Security Properties Theme Make Default
default	Security Properties Theme Rename Default
template	Security Properties Theme Make Default

Powered by JBoss Portal

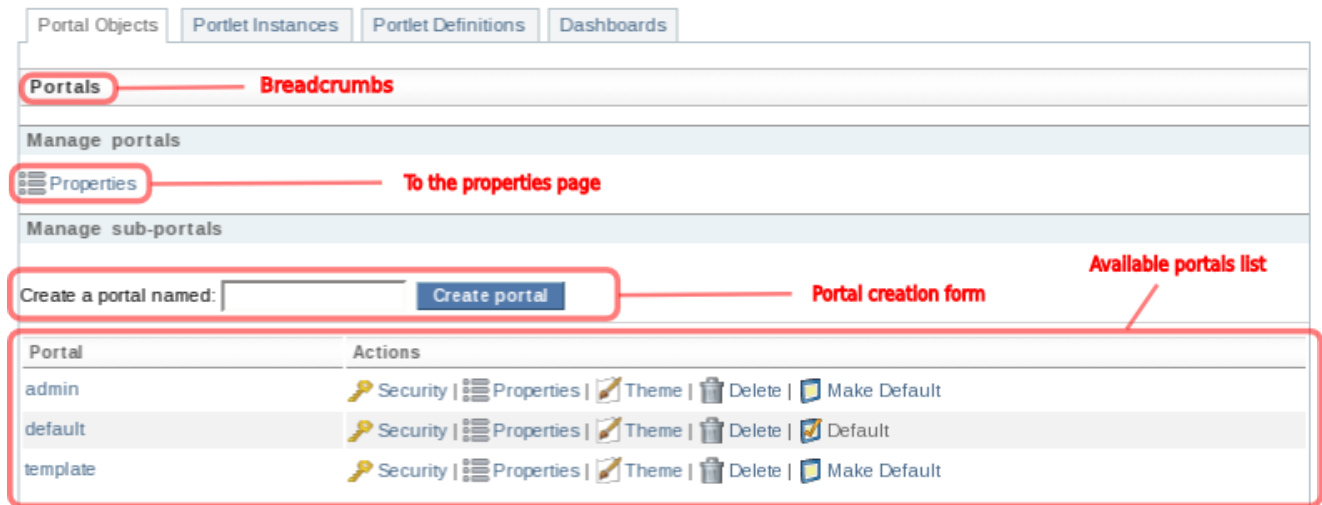
The tabs are:

- *Portal Objects* gathering operations pertaining to managing portal objects (portal instances, pages, windows and their respective configuration information). This is the most complex part of the interface.
- *Portlet Instances* giving access to all the Portlet instances that have been configured.
- *Portlet Definitions* giving access to the currently available portlet providers as well as the Portlets that each provider publishes.
- *Dashboards* allowing administrators to configure how Dashboards should behave.

We will look at each of these tabs and their functionality in the following sections.

## 2.2.1. Managing Portal Objects

### 2.2.1.1. Portals operations



The `Portal Objects` brings the administrator to a page showing the list of the available portal instances defined for this Portal server. Several points are of particular interest. First, a navigation indicator or "breadcrumbs" is located right beneath the tabs. This provides context as to where in the hierarchy of portal objects the current screen is located as some of the screens can be found at several levels of the hierarchy. If you are lost, take a look at the breadcrumbs for context! When you first click on the `Portal Objects` tab, the context is the list of portals as shown in the picture above.

A link to access server-wide portal properties is located right beneath the breadcrumbs. This allows the administrator to set server-wide property and configure how errors should be handled:

## &gt; Portals Properties

**Properties**

Add a property.

Select predefined property:

Drag and drop:

or
Enter property name:

Add Property

**Portal Error Handling**

Configure how the system handles errors on portal level.

Case	Inheritance	Action
When access to the page is denied	<input type="checkbox"/> inherit action from parent	display the default error message.
When the page is unavailable	<input type="checkbox"/> inherit action from parent	display the default error message.
When there is an error on the page	<input type="checkbox"/> inherit action from parent	redirect to the specified resource.
When there is an error within the page	<input type="checkbox"/> inherit action from parent	redirect to the specified resource.
When the page is not found	<input type="checkbox"/> inherit action from parent	display the default error message.
On error redirect to this resource	<input type="checkbox"/> inherit action from parent	/WEB-INF/jsp/error/portal.jsp

Update

**Page Error Handling**

Configure how the system handles errors on page level.

Case	Inheritance	Action
When access to the window is denied	<input type="checkbox"/> inherit action from parent	remove the resource from page.
When the window is unavailable	<input type="checkbox"/> inherit action from parent	remove the resource from page.
When there is an error on the window	<input type="checkbox"/> inherit action from parent	redirect to the specified resource.
When there is an error within the window	<input type="checkbox"/> inherit action from parent	redirect to the specified resource.
When the window is not found	<input type="checkbox"/> inherit action from parent	remove the resource from page.
On error redirect to this resource	<input type="checkbox"/> inherit action from parent	/WEB-INF/jsp/error/page.jsp

Update

Please refer to the [Error handling chapter](http://docs.jboss.com/jbportal/v2.6/reference-guide/en/html/errorhandling.html) [http://docs.jboss.com/jbportal/v2.6/reference-guide/en/html/errorhandling.html] of the Reference Guide for more information on this point.

A form allowing administrator to create new portal instances is located beneath the `Properties` link. Enter the name of the new portal (which, of course, should be different from any of the already existing one) and click on `Create portal` and the portal instances list will be refreshed to display the newly created portal instance.

The last element at this level is a table listing all the available portal instances along with possible actions on them. Clicking on the portal name will display a screen showing the information for this given portal instance, thus drilling down the hierarchy of available portal objects. Clicking on an action name will execute the specified action on the associated portal instance. These actions are available on each individual portal screen as we shall see. The notable exception is the `Make`



Default/Default action which is only available in this listing as it is more of an action across portals than specific to a portal thus benefiting from being seen at this level. This action allows users to specify which portal instance is displayed when Portal is first being accessed. Clicking on Make Default will specify that the associated portal will be displayed to users by default. The portal list will be refreshed and the selected portal status will be refreshed, its action now showing its Default status.

In the next sections we will demonstrate the functionality of the management portlet by drilling progressively further down this hierarchy to look at the default portal, one of its pages, show how to configure content on a page and, finally, look at a specific window information.

### 2.2.1.2. Looking at a portal instance information

If you click on the default portal in the list of available portal instances on the top-level Portal Objects page, you'll be taken to a page showing the information for the portal instance named "default", as shown below:

The screenshot displays the 'Manage default portal' interface. At the top, there are tabs for 'Portal Objects', 'Portlet Instances', 'Portlet Definitions', and 'Dashboards'. Below these, a breadcrumb trail shows 'Portals > default portal'. The main section is titled 'Manage default portal' and contains links for 'Security', 'Properties', 'Theme', and 'Delete'. Below this is a section for 'Manage sub-pages within default portal' which includes a 'Create a page named:' form with a 'Create page' button. At the bottom, there is a table with two columns: 'Page' and 'Actions'. The table lists four pages: 'News', 'TestWithAjax', 'Weather', and 'default'. Each page has a set of action links: 'Page layout', 'Security', 'Properties', 'Theme', 'Rename', 'Display Names', 'Delete', and 'Make Default'.

Note the breadcrumbs at the top of the screen indicating where in the hierarchy you currently are. In this case, we are looking at the default portal.

Links to more information and operations that affect this portal instance are located beneath the breadcrumbs. We will look at them in turn later, excluding the Destroy operation, which as its name implies, allows an administrator to destroy the current portal instance. Note that these links mirror the links that were available in the portal instances list on the top level page, Make Default/Default excepted.

It is possible to create new pages using the page creation form located under the portal-wide operation links. Enter the new page name and click on Create page and the new page will appear in the pages list, ready to be configured.

Finally, a table displaying the list of available pages for this portal instance is located at the bottom of this screen. The first column shows the page name, which you can click to drill down the hierarchy and display the information specific to that particular page. The second column, on the other hand, provides a list of action links on the associated page. These links will be also appearing

on individual page screens, as we shall see, just like portal action links appearing in the portal instances list also appeared on individual portal pages. Once again, the `Make Default/Default` action, which behaves as its portal counterpart, only appears in this list: this is where you specify which page should be the default one when users first access the portal instance.

Let's now look at the default portal's `Security` information screen. This can be accessed by clicking the `Security` action link on the portal page. Here, an administrator can configure the default policy for security on objects for this portal instance:

Portal Objects

Portlet Instances

Portlet Definitions

Dashboards

Portals > default portal Security

Please set the page permissions

Roles	Permissions
Role Administrators:	<input type="checkbox"/> View <input type="checkbox"/> View Recursive <input type="checkbox"/> Personalize <input type="checkbox"/> Personalize Recursive
Role Users:	<input type="checkbox"/> View <input type="checkbox"/> View Recursive <input type="checkbox"/> Personalize <input type="checkbox"/> Personalize Recursive
Role Unchecked:	<input type="checkbox"/> View <input checked="" type="checkbox"/> View Recursive <input type="checkbox"/> Personalize <input checked="" type="checkbox"/> Personalize Recursive

Update

Cancel

Please refer to the [Security](http://docs.jboss.com/jbportal/v2.6/reference-guide/en/html/security.html) [http://docs.jboss.com/jbportal/v2.6/reference-guide/en/html/security.html] chapter of the Reference Guide for more information about how to secure portal objects.

The `Properties` action link displays the currently configured properties for this portal instance and allows you to modify them, as well as configure the error handling strategy:

> Portals > default Portal Properties

Properties				
Add a property.		Manage currently defined properties.		
Select predefined property:	<b>Name</b>	<b>Description</b>	<b>Inherited Value</b>	<b>Delete</b>
Partial refresh	Default child name	The child name used when no specific child name is explicited	Yes	<input type="text" value="default"/>
or				
Enter property name:				<input type="button" value="Update"/>
<input type="text"/>				
<input type="button" value="Add Property"/>				

Portal Error Handling		
Configure how the system handles errors on portal level.		
Case	Inheritance	Action
When access to the page is denied	<input checked="" type="checkbox"/> inherit action from parent	<input arrow"="" dropdown="" type="text" value="display the default error message. &lt;img alt="/>
When the page is unavailable	<input checked="" type="checkbox"/> inherit action from parent	<input arrow"="" dropdown="" type="text" value="display the default error message. &lt;img alt="/>
When there is an error on the page	<input checked="" type="checkbox"/> inherit action from parent	<input arrow"="" dropdown="" type="text" value="redirect to the specified resource. &lt;img alt="/>
When there is an error within the page	<input checked="" type="checkbox"/> inherit action from parent	<input arrow"="" dropdown="" type="text" value="redirect to the specified resource. &lt;img alt="/>
When the page is not found	<input checked="" type="checkbox"/> inherit action from parent	<input arrow"="" dropdown="" type="text" value="display the default error message. &lt;img alt="/>
On error redirect to this resource	<input checked="" type="checkbox"/> inherit action from parent	<input type="text" value="/WEB-INF/jsp/error/portal.jsp"/>
<input type="button" value="Update"/>		

Page Error Handling		
Configure how the system handles errors on page level.		
Case	Inheritance	Action
When access to the window is denied	<input checked="" type="checkbox"/> inherit action from parent	<input arrow"="" dropdown="" type="text" value="remove the resource from page. &lt;img alt="/>
When the window is unavailable	<input checked="" type="checkbox"/> inherit action from parent	<input arrow"="" dropdown="" type="text" value="remove the resource from page. &lt;img alt="/>
When there is an error on the window	<input checked="" type="checkbox"/> inherit action from parent	<input arrow"="" dropdown="" type="text" value="redirect to the specified resource. &lt;img alt="/>
When there is an error within the window	<input checked="" type="checkbox"/> inherit action from parent	<input arrow"="" dropdown="" type="text" value="redirect to the specified resource. &lt;img alt="/>
When the window is not found	<input checked="" type="checkbox"/> inherit action from parent	<input arrow"="" dropdown="" type="text" value="remove the resource from page. &lt;img alt="/>
On error redirect to this resource	<input checked="" type="checkbox"/> inherit action from parent	<input type="text" value="/WEB-INF/jsp/error/page.jsp"/>
<input type="button" value="Update"/>		

The Theme action link displays a screen where the administrator can configure theme, layout and render set for this portal instance:

Portal Objects Portlet Instances Portlet Definitions Dashboards

Portals default portal Theme

Page theme properties

Name	Description	Setting
Layout	Name of the layout implementation used to arrange portlet windows in pages	default
Theme	Name of the look and feel to use	default
RenderSet	Name of the render engine to use to render pages	default

Update Cancel

Please refer to the [Layouts and Themes](http://docs.jboss.com/jbportal/v2.6/reference-guide/en/html/themeandlayouts.html) [http://docs.jboss.com/jbportal/v2.6/reference-guide/en/html/themeandlayouts.html] chapter of the Reference Guide for more information about themes and layouts.

The `Display Name` action link displays a screen where the administrator can configure different names for different languages:

Add Display Names

Albanian

Add Name

Current Display Names

Locale	Display Name	Delete	Rename
Spanish	Noticias	Delete	Rename
Italian	Novita'	Delete	Rename
French	Actualités	Delete	Rename
English	News	Delete	Rename

The different names will be used as page display names for the preferred locale of the logged-in user. This is used by the default tab navigation of the default layouts.

Now that we have looked at portal level information, let's drill down the hierarchy again and look at a page, more precisely the `default` page, by clicking its name in the pages list.

### 2.2.1.3. Looking at a page configuration

Portal Objects
Portlet Instances
Portlet Definitions
Dashboards

Portals
default portal
**default page**

Manage default page

Page layout | Security | Properties | Theme | Rename | Delete

Manage sub-pages within default page

Create a page named:

Manage windows within default page

Window	Actions
CMSWindow	Theme   Properties   Rename   Delete
CurrentUsersPortletWindow	Theme   Properties   Rename   Delete
IdentityUserPortletWindow	Theme   Properties   Rename   Delete
JSPPortletWindow	Theme   Properties   Rename   Delete

The layout of this screen should start feeling familiar. The information for a page looks a lot like the information for a portal instance. Note the breadcrumbs indicating that you are indeed looking at a page. Again, we find the action links at the top of the page, mirroring the ones that were available for each page in the pages list of the portal instance screen. Once again, you can configure the page's security, theme and properties. You can also destroy it if so desired.

Similarly to other screens in the portal objects hierarchy, a page configuration screen also provides a list of all windows for that page. This list contains two columns: the first one contains the name of the window, while the second one provides a list of action links for that specific window. As usual, clicking on a window name will display information about that window.

Just like a portal instance can contain several pages, a page can contain several subpages. As such a page defines means to create subpages and set which subpage to display when a user is first directed to the page. These operations work similarly to the same operations at the portal instance level.

You can also rename the page if desired:

Portal Objects
Portlet Instances
Portlet Definitions
Dashboards

Portals
default portal
**default page Rename**

Rename page

Rename the default page to:

Of specific interest, though, is the `Page Layout` link. This is where you need to go to configure which portlet instance will be displayed in which window on which region on the page. Let's take a look at this screen and how it works:

The screenshot shows a web portal administration interface. At the top, there are tabs: `Portal Objects`, `Portlet Instances`, `Portlet Definitions`, and `Dashboards`. Below these, a breadcrumb trail shows `Portals` > `default portal` > `default page Layout`. The main area is divided into two panels: **Content Definition** and **Page Layout**.

**Content Definition Panel:**

- Define a name for the window of content (optional):  
Window Name:
- Select the type of content that will be added to the page:  
Content Type: portlet
- Select content that will be added to the page:  
Portlet instance associated to this window:  
  - AdminPortletInstance
  - AsyncURLPortletInstance
  - bea
  - CachedCounterPortletInstance
  - CatalogPortletInstance
  - CharsetPortletInstance
  - CMSAdminPortletInstance
  - CounterPortletInstance
  - CurrentUsersPortletInstance
  - DashboardConfigPortletInstance
  - EncodingPortletInstance
  - EventPortletInstance
  - ExceptionPortletInstance
  - FileUploadPortletInstance
  - FormAutoSubmitPortletInstance
  - HeaderContentPortletInstance
  - IdentityAdminPortletInstance
  - IdentityUserPortletInstance

**Page Layout Panel:**

- center Region**  
Add CMSWindow [Up] [Down] [Delete]
- left Region**  
Add JSPPortletWindow  
IdentityUserPortletWindow  
CurrentUsersPortletWindow [Up] [Down] [Delete]

This screen is structured in two parts, flowing from left to right, following the natural process involved in displaying content on a page. First, you need to identify which content you want to display: this is what the `Content Definition` section is for. Then, you need to figure out where on the page should this content be displayed, hence the `Page Layout` section.

Let's add a window named `test` displaying the content of the portlet instance named `NewsPortletInstance` to the center region, beneath the already existing `CMSWindow`. First, we need to enter our new window name in the `Window name` field and select the `portlet` content type from the drop down menu:

**Content Definition**

Define a name for the window of content (optional):

Window Name:

---

Select the type of content that will be added to the page:

Content Type: portlet ▼

Select content type to be added to the page:

portlet  
widget/google  
cms  
filesystem

Portlet instance to add to this window:

AdminPortletInstance

AsyncURLPortletInstance

bea

CachedCounterPortletInstance

CatalogPortletInstance

CharsetPortletInstance

CMSAdminPortletInstance

CounterPortletInstance

CurrentUsersPortletInstance

DashboardConfigPortletInstance

EncodingPortletInstance

EventPortletInstance

ExceptionPortletInstance

FileUploadPortletInstance

FormAutoSubmitPortletInstance

HeaderContentPortletInstance

IdentityAdminPortletInstance

IdentityUserPortletInstance

Once this is done, we can select the portlet instance by clicking its name in the instances list:

**Content Definition**

Define a name for the window of content (optional):

Window Name:

---



Select the type of content that will be added to the page:

Content Type:

---

Select content that will be added to the page:

Portlet instance associated to this window:

EventPortletInstance	 
ExceptionPortletInstance	
FileUploadPortletInstance	
FormAutoSubmitPortletInstance	
HeaderContentPortletInstance	
IdentityAdminPortletInstance	
IdentityUserPortletInstance	
JSPPortletInstance	
ModePortletInstance	
NewsPortletInstance	
NewsPortletInstance2	
PortletAInstance	
PortletBInstance	
PortletSessionPortletInstance	
RolePortletInstance	
SecuredTestPortletInstance	
TestPortletInstance	
URLPortletInstance	

Portlet instance: NewsPortletInstance  
Portlet name: News Portlet  
Portlet description: Portlet aggregating news from different feeds  
Portlet title: News Feeds  
Portlet keywords: sample, news

Note that this displays some information about the portlet instance. Finally, we can add our window to the center region of the page by clicking on **Add** button located left to the windows list for the region:



Page Layout

center Region

Add

CMSWindow

test

Up

Down

Delete

left Region

Add

JSPPortletWindow

IdentityUserPortletWindow

CurrentUsersPortletWindow

Up

Down

Delete

Note that we could move the window up or down in the region by selecting it in the list and using the button to the right of the list, or even destroy it if desired.

We can repeat this process to add content of different types. Let's add a window using a Google widget game. First, give a name to your window (we'll use "google" here) and select `widget/google` from the content type drop-down menu:

**Content Definition**

Define a name for the window of content (optional):

Window Name:

---

Select the type of content that will be added to the page:

Content Type: portlet ▼

portlet

widget/google

cms

filesystem

Select content to be added to the page:

Portlet instance to add to this window:

AdminPortletInstance

AsyncURLPortletInstance

bea

CachedCounterPortletInstance

CatalogPortletInstance

CharsetPortletInstance

CMSAdminPortletInstance

CounterPortletInstance

CurrentUsersPortletInstance

DashboardConfigPortletInstance

EncodingPortletInstance

EventPortletInstance

ExceptionPortletInstance

FileUploadPortletInstance

FormAutoSubmitPortletInstance

HeaderContentPortletInstance

IdentityAdminPortletInstance

IdentityUserPortletInstance

Note how the instances list is replaced by a list of Google widgets. The widget we want to use is located in the **Fun & Games** category, so select it from the category drop-down menu:

### Content Definition

Define a name for the window of content (optional):

Window Name:

Select the type of content that will be added to the page:

Content Type:

Select content that will be added to the page:

☒ Gadget Directory ☐ Gadget URI

<input type="text"/>	<input type="text"/>	<input type="button" value="Search Gadgets"/>
<div><div>__MSG_wikipedia__</div><div>ToDo</div><div>Dictionary</div><div>Weather Forecasts</div><div>Date &amp; Time</div><div>This Day in History</div><div>Brain Teasers</div><div>Einstein Quote of the Day</div><div>Current Moon Phase</div><div>Garfield of the day</div></div>	<div><div>Popular</div><div>News</div><div>Communication</div><div>Fun &amp; Games</div><div>Finance</div><div>Sports</div><div>Lifestyle</div><div>Technology</div><div>New stuff</div></div>	

Press **Search Gadgets** and the widget list will be refreshed. The widget we want is **Bejeweled**:

**Content Definition**

Define a name for the window of content (optional):

Window Name:

---

Select the type of content that will be added to the page:

Content Type:

---

Select content that will be added to the page:

☒ Gadget Directory ☐ Gadget URI

---

This Day in History

Brain Teasers

Garfield of the day

Search YouTube

Funny Cat Photos

Hangman (word game)

Love Quote of the Day

Bejeweled

You can now add the new window to the desired region.

Let's repeat this process again, this time with content from CMS. Enter a new window name (we'll use "cms" here) and select `cms` from the content type drop-down menu:

**Content Definition**

Define a name for the window of content (optional):

Window Name:

---

Select the type of content that will be added to the page:

Content Type:


---

Select content that will be added to the page:

Browsing: [Home](#)

---

Name

 default

Once again, the instances list was replaced by a directory listing showing the available content roots. Click on `default` and select `project.html`:

**Content Definition**

Define a name for the window of content (optional):

Window Name:

---






Select the type of content that will be added to the page:

Content Type:

---

Select content that will be added to the page:

Browsing: [Home](#) > default

Name
 <a href="#">images</a>
 <a href="#">private</a>
 <a href="#">index.html</a>
 <a href="#">project.html</a>
 <a href="#">support.html</a>

Selected file: /default/project.html  
File title: JBoss Portal  
File description: JBoss Portal

You can now add the window to the desired region.

We've added three new windows to the default page using different content types. We added a window displaying the content of a portlet (displaying the content of an RSS feed in this case). Another one displaying a Google widget and yet another one some CMS-issued content. We decided to remove the existing `CMSWindow`, add the `cms` window below the `test` one in the center region, while the window showing the Google widget was added to the left region, below the existing content:

Page Layout

center Region

Add

test  
cms

Up

Down

Delete

left Region

Add

JSPPortletWindow  
google

Up

Down

Delete

If all went well, logging out of the Admin portal, you should see:

JBossPortal

Home

News

Test

TestWithAjax

Weather

Logged in as: admin

Dashboard | Admin | Logout

Greetings!

1 Demo.

2 Download.

3 Accessorize.

This is a basic installation of **JBoss Portal 2.6.2-GA**. You may log in at any time, using the **Login** link at the top-right of this page, with the following credentials:

user/user or admin/admin

If you are in need of guidance with regards to navigating, configuring, or operating the portal, please view our online documentation.

Google Widget

News Feeds

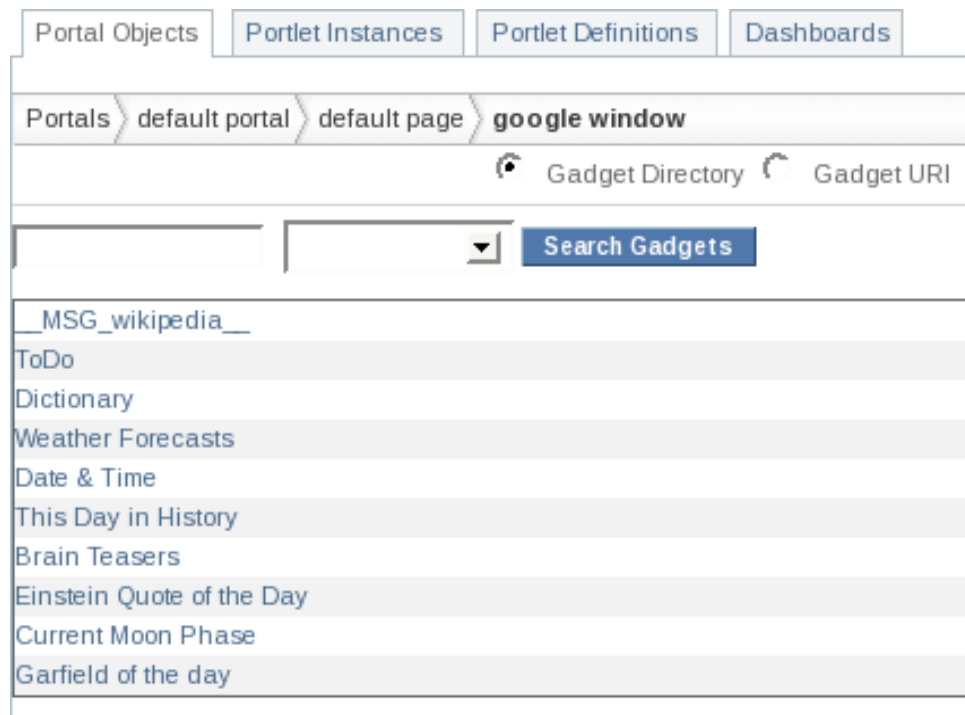
JBoss Portal -

- How does your portal QA compare ?  
Prabhat Jha - Wed, 19 Sep 2007 18:46:00 +0000
- Specifications blues...  
Christophe Laprun - Fri, 14 Sep 2007 11:21:00 +0000
- JBoss Portal Modularization  
Julien Viet - Wed, 05 Sep 2007 07:19:00 +0000
- User portlet UI improvements  
Emanuel Muckenhuber - Tue, 28 Aug 2007 11:52:00 +0000
- JBoss Portal takes an unbiased stance on Single Sign On (Part 2)  
Sohil - Tue, 14 Aug 2007 16:45:00 +0000
- Sun Directory Server in JBoss Portal QA  
Boleslaw Dawidowicz - Thu, 02 Aug 2007 22:11:00 +0000
- JBoss Portal 2.6.1.GA released  
Thomas Heute - Thu, 26 Jul 2007 10:00:00 +0000
- JBoss Portal takes an unbiased stance on Single Sign On (Part 1)  
Sohil - Wed, 18 Jul 2007 17:21:00 +0000
- GWT Portlet  
Julien Viet - Fri, 13 Jul 2007 21:02:00 +0000
- JBoss Portal movies  
Thomas Heute - Tue, 10 Jul 2007 15:41:00 +0000
- LDAP support tutorial for JBoss Portal 2.6 (part 2)  
Boleslaw Dawidowicz - Wed, 04 Jul 2007 22:12:00 +0000
- Why product release blog entries are so boring ?  
Julien Viet - Mon, 02 Jul 2007 09:29:00 +0000
- JBoss Portal 2.6 released!!!!!!!  
Julien Viet - Mon, 02 Jul 2007 09:24:00 +0000
- Yet another iPhone impact analysis  
Christophe Laprun - Wed, 27 Jun 2007 13:33:00 +0000
- JBoss Portal CR3 release  
Julien Viet - Fri, 22 Jun 2007 10:30:00 +0000
- JSF is great but...  
Julien Viet - Fri, 22 Jun 2007 00:32:00 +0000
- JIRA missing basic features  
Julien Viet - Thu, 21 Jun 2007 23:54:00 +0000
- An implementation of partial portal page refresh  
Julien Viet - Tue, 19 Jun 2007 15:27:00 +0000
- LDAP support tutorial for JBoss Portal 2.6 (part 1)  
Boleslaw Dawidowicz - Fri, 08 Jun 2007 10:18:00 +0000
- Portal or not portal: When to go with a JSR 168 Portal ? Part 2  
Thomas Heute - Fri, 01 Jun 2007 16:40:00 +0000
- Portal or not portal: When to go with a JSR 168 Portal ? Part 1

You can read more about [Content Integration](http://docs.jboss.com/jbportal/v2.6/reference-guide/en/html/contentintegration.html) [http://docs.jboss.com/jbportal/v2.6/reference-guide/en/html/contentintegration.html] in the Reference Guide. More details on how to setup content roots in CMS are available in [Section 3.1, "Introduction"](#).

### 2.2.1.4. Looking at windows of a given page











Window operations are similar to the same operations at other level of the hierarchy of portal objects. The only information displayed when a window name is clicked in the windows list of a portal page information screen is information about the content, similar to the one that is displayed in the page layout screen. Thus, for the `google` window that we created in the previous section:



Note, once again, the breadcrumbs... :)

### 2.2.2. Managing Portlet Instances

The `Portlet Instances` tab brings the administrator to the list of instances created in the running portal. On this page, the user can either modify the security constraints for the portlet (to grant access only to certain roles), destroy an instance or override the portlet definition preferences for a specific instance if there is any overridable preference.

Portal Objects		Portlet Instances	Portlet Definitions	Dashboards
Id		Actions		
AdminPortletInstance		 Security    Delete		
AsyncURLPortletInstance		 Security    Delete		
bea		 Security    Delete		
CachedCounterPortletInstance		 Security    Delete		
CatalogPortletInstance		 Security    Delete		
CharsetPortletInstance		 Security    Delete		
CMSAdminPortletInstance		 Security    Delete		
CounterPortletInstance		 Security    Delete		
CurrentUsersPortletInstance		 Security    Delete		
DashboardConfigPortletInstance		 Security    Delete		
EncodingPortletInstance		 Security    Delete		

### 2.2.3. Managing Portlet Definitions

The `Portlet Definitions` tab brings the administrator to the list of portlet definitions, formatted as a table displaying name, description, whether the portlet is remote (i.e. accessed via WSRP from a remote producer) or if it is remotable (i.e. if it is exposed to WSRP consumers by Portal's producer).

Portlet definitions can be made available by different providers. You can select the provider you want to browse by selecting it in the drop-down menu and clicking `View portlets`. By default, two providers are available:

- *local*: this is Portal's portlet container. Any successfully deployed portlet will appear in the list of available portlet definitions for this provider.
- *self*: this is Portal's default WSRP consumer configured to consume portlets published by Portal's own WSRP producer. This doesn't have much practical interest apart from allowing a quick test of the WSRP functionality of Portal.

More providers can be added to this list. In particular, any active, properly configured WSRP consumer will also appear in the drop-down menu. Please refer to the [Consuming remote WSRP portlets in JBoss Portal](http://docs.jboss.com/jbportal/v2.6/reference-guide/en/html/wsrp.html#consumer_configuration) [http://docs.jboss.com/jbportal/v2.6/reference-guide/en/html/wsrp.html#consumer\_configuration] chapter of the Reference Guide for more information on this topic.



Portal Objects	Portlet Instances	Portlet Definitions	Dashboards
----------------	-------------------	---------------------	------------

View portlets provided by the portlet provider named: local View portlets

Name	Description	Remote	Removable	Actions
Administration Portlet	Administration Portlet	<input type="checkbox"/>	<input type="checkbox"/>	Create instance
Async URL Portlet	Async URL Portlet	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Create instance
Basic Portlet		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Create instance
Cached Counter Portlet	Counter Portlet with cache support	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Create instance
Charset Portlet	Portlet showing different ways to properly display and submit unicode text	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Create instance
Content Management System Administration Portlet	Administration Portlet for CMS	<input type="checkbox"/>	<input type="checkbox"/>	Create instance
Counter Portlet	Portlet displaying the number of it's action/render calls	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Create instance
Current Users Portlet	Current users portlet	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Create instance
Dashboard Configurator Portlet	Dashboard Configurator Portlet	<input type="checkbox"/>	<input type="checkbox"/>	Create instance
Encoding Portlet	Portlet for testing encoding	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Create instance
Event Portlet	Event Portlet	<input type="checkbox"/>	<input type="checkbox"/>	Create instance

Clicking on a portlet name in the list will display the portlet definition title, description, supported languages and keywords.

Portal Objects	Portlet Instances	Portlet Definitions	Dashboards
----------------	-------------------	---------------------	------------

Portlet Definitions	<b>Administration Portlet details</b>
---------------------	---------------------------------------

Portlet name:	Administration Portlet
Portlet description:	Administration Portlet
Portlet title:	Management Portlet
Portlet keywords:	management,admin
Portlet locales:	en

The `Preferences` action (when available) is used to edit preferences at the portlet definition level as explained in the JSR-168 specification.

## 2.2.4. Managing Dashboards

The `Dashboards` tab allows the administrator to configure parameters for all user dashboards. It also allows her to configure the error pages and theme properties as for the other portal objects.

## 2.2.5. Wizard mode

The wizard mode is a fast and easy way to create a new window on a page backed by a portlet instance. The user just needs to define which portlet definition to use, where should the instance be located (portal / page / location on the page) and the wizard will automatically create a new

instance of the portlet, create a window for it and add that window to the specified region on the page defined by the user.

**Adding a new Portlet**

Step 1  
Select Portlet

Step 2  
Select Portal

Step 3  
Select Page

Step 4  
Select Region

Step 5  
Confirm

Portlet provider: local ▾ Change

Name
Administration Portlet
Async URL Portlet
Basic Portlet
Cached Counter Portlet
Charset Portlet
Content Management System Administration Portlet
Counter Portlet
Current Users Portlet
Dashboard Configurator Portlet
Encoding Portlet

# Administration - Content Management System

Roy Russo



## 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 portal and then the CMS Page tab.

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

The screenshot shows the 'CMS Administration' portlet. At the top, there's a title bar with the text 'CMS Administration' and two small icons. Below the title bar, a message says 'Use the CMS Administration portlet to manage the content of your portal.' followed by a dashed line. Underneath, there's a 'Browsing: Home' link. To the right is a search bar with a 'Search' button. Below the search bar is a 'Select Action' dropdown menu. At the bottom, there's a table with four columns: 'Name', 'Action', 'Created', and 'Modified'. The 'Name' column contains a folder icon and the text 'default'. The 'Action' column contains a 'View' dropdown menu and a 'Go' button. The 'Created' and 'Modified' columns both show the date and time '06/27/07 12:20'.

Name	Action	Created	Modified
 default	View  Go	06/27/07 12:20	06/27/07 12:20

## 3.2. Actions

This section describes common actions an administrator can perform from within the AdminCMS Portlet. All actions are available using the flyout menu. Note that the Pending Items action is only available if the workflow mechanism has been activated.

Select Action ▾
Create Folder
Create File
Upload File
Upload Archive
Export Folder
Secure
Pending Items
Copy
Move
Delete






3.2.1. Viewing Directories

CMS Administration

Use the CMS Administration portlet to manage the content of your portal.

Browsing: Home > default

Select Action ▾

Name	Action	Created	Modified
 images	<div>View ▾</div> <div>Go</div>	06/27/07 12:20	06/27/07 12:20
 private	<div>View ▾</div> <div>Go</div>	06/27/07 12:20	06/27/07 12:20
 index.html	<div>View ▾</div> <div>Go</div>	06/27/07 12:20	06/27/07 12:20
 project.html	<div>View ▾</div> <div>Go</div>	06/27/07 12:20	06/27/07 12:20
 support.html	<div>View ▾</div> <div>Go</div>	06/27/07 12:20	06/27/07 12:20

A user can list directory contents by either clicking on the folder name or selecting "view" from the Action dropdown and clicking "go".






### 3.2.2. Viewing File Properties

CMS Administration

Use the CMS Administration portlet to manage the content of your portal.

Browsing: Home > default

Select Action ▾

Name	Action	Created	Modified
 images	View ▾ <input type="button" value="Go"/>	06/27/07 12:20	06/27/07 12:20
 private	View ▾ <input type="button" value="Go"/>	06/27/07 12:20	06/27/07 12:20
 index.html	View ▾ <input type="button" value="Go"/>	06/27/07 12:20	06/27/07 12:20
 project.html	View ▾ <input type="button" value="Go"/>	06/27/07 12:20	06/27/07 12:20
 support.html	View ▾ <input type="button" value="Go"/>	06/27/07 12:20	06/27/07 12:20

Clicking on the "Name" of a file brings up the File Properties page.







CMS Administration

Use the CMS Administration portlet to manage the content of your portal.

Browsing: Home > default > index.html

Select Action ▾

English

Type	Size	Version	Created	Modified	Title
 text/html	2kb	1.0	06/27/07 12:20	06/27/07 12:20	JBoss Portal
 text/html	2kb	1.1	06/27/07 17:14	06/27/07 17:14	JBoss Portal
 text/html	2kb	1.2	06/27/07 17:14	06/27/07 17:14	JBoss Portal
 text/html	2kb	1.3	06/27/07 17:15	06/27/07 17:15	JBoss Portal
 text/html	2kb	1.4 ★	06/27/07 17:15	06/27/07 17:15	JBoss Portal
 text/html	2kb	1.5	06/27/07 17:15	06/27/07 17:15	JBoss Portal

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

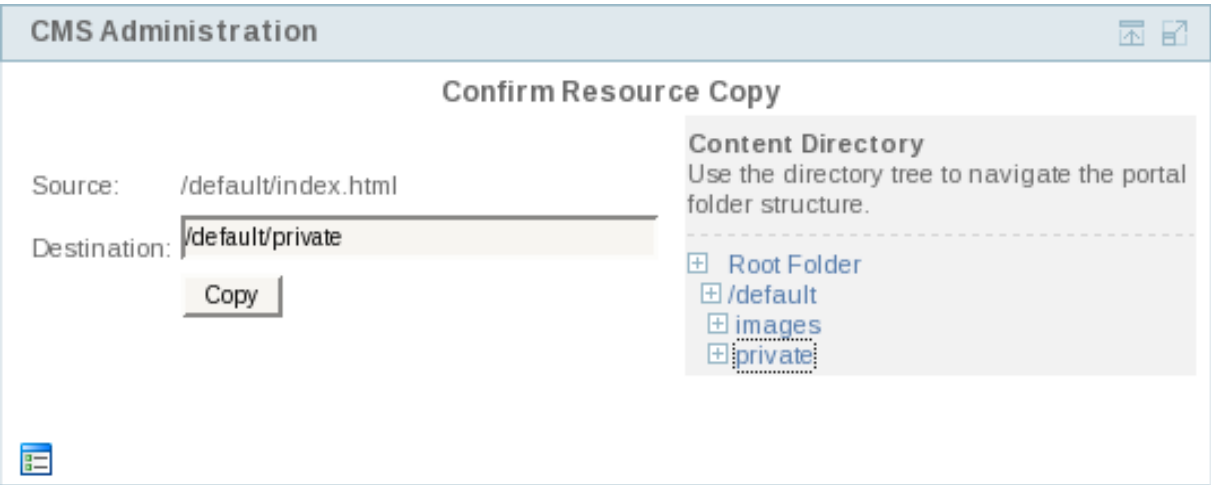
Version and Locale Information are also contained on this screen. Note that any version labeled with the



is the current "live" version shown to users.

### 3.2.3. Copying Files/Directories

Clicking on the "Copy" action, displays the copy file/directory dialog window.



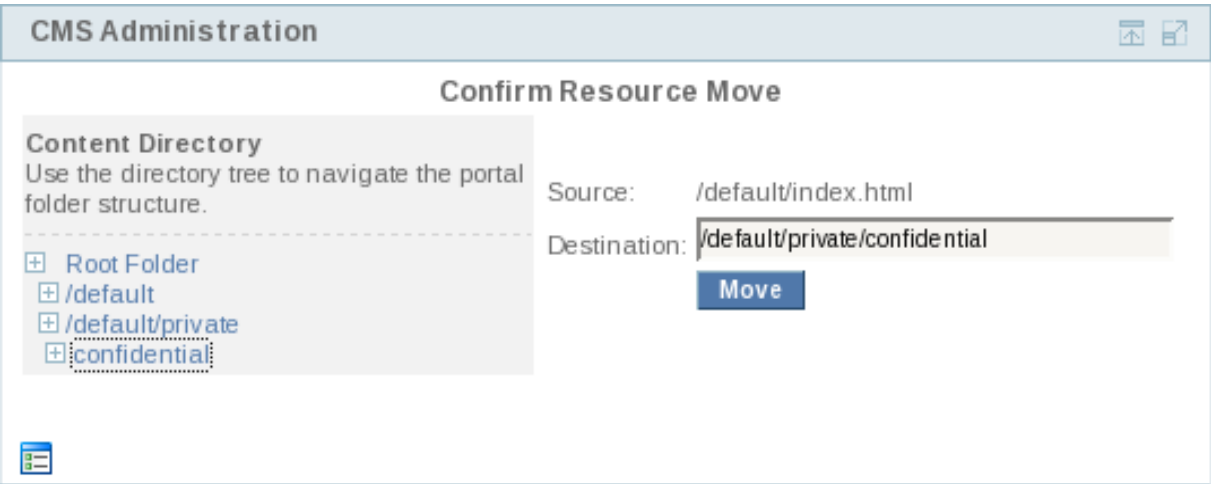
The copy resource window allows a user to copy files to any folder on the system, as well as copy whole directory trees to any directory on the system. A user can select which destination directory to copy the resource to, by using the directory browser. Clicking the

+

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 "Move" action, displays the move file/directory dialog window.



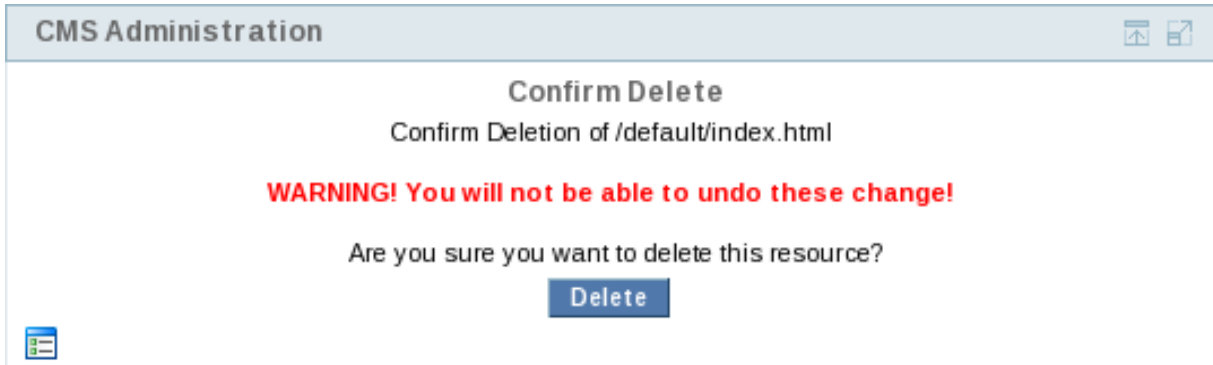
The move resource window allows a user to move files to any folder on the system, as well as move whole directory trees to any directory on the system. A user can select which destination directory to move the resource to, by using the directory browser. Clicking the

+

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 "Delete" action, displays the delete file/directory confirmation window.



The screenshot shows a dialog box titled "CMS Administration" with a "Confirm Delete" header. Below the header, it says "Confirm Deletion of /default/index.html". A red warning message states: "WARNING! You will not be able to undo these change!". Below this, it asks "Are you sure you want to delete this resource?". At the bottom center is a blue "Delete" button. There is a small icon in the bottom left corner.

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.

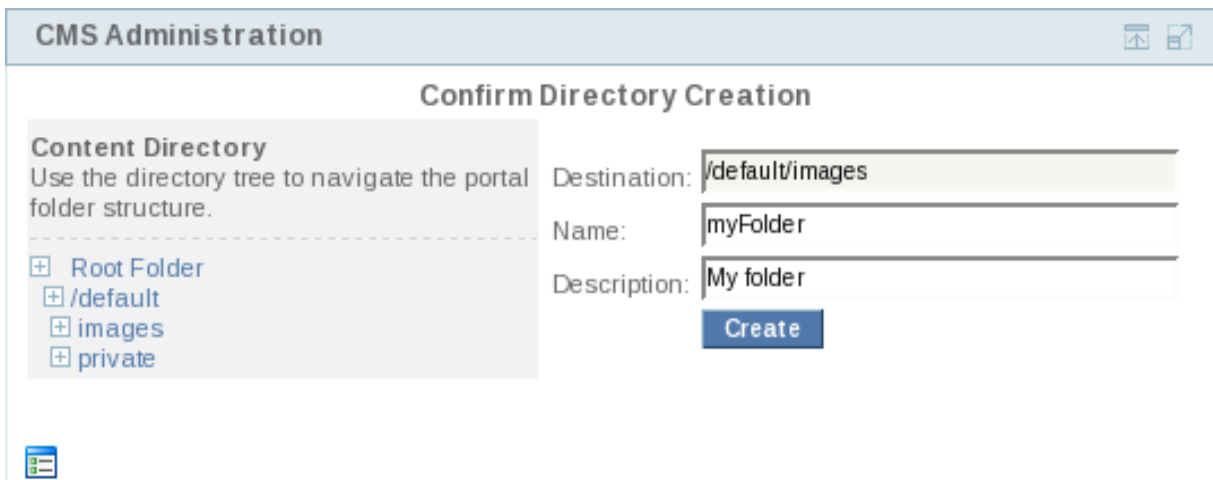


#### Warning

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 "Create Folder" action, displays the create directory dialog window.



The screenshot shows a dialog box titled "CMS Administration" with a "Confirm Directory Creation" header. On the left, under "Content Directory", it says "Use the directory tree to navigate the portal folder structure." Below this is a tree view with "Root Folder" expanded, showing sub-items: "/default", "images", and "private". On the right, there are three input fields: "Destination:" with the value "/default/images", "Name:" with the value "myFolder", and "Description:" with the value "My folder". A blue "Create" button is at the bottom right. There is a small icon in the bottom left corner.

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 "Create File" action, displays the create file dialog window with the embedded WYSIWYG editor and directory browser.

**CMS Administration**

**Create File**

Creating File in Directory: /default

FileName:

Description:

Title:

Language:

WYSIWYG Editor: ☒

**i** 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** | | -- Format -- | -- Font family -- | -- Font size -- |

HTML |

Create Reset



The create file window allows a user to create 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

HTML

button.

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 "Upload File" action, displays the upload file dialog window.

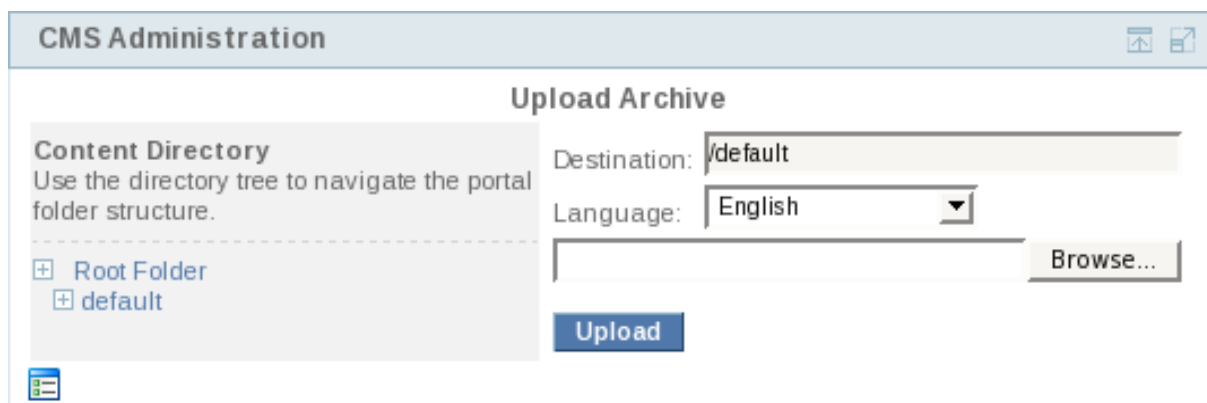
The upload file window allows a user to upload files to any directory on the system. The upload process will work on files up to 1GB and of all types. A user can select which destination directory to upload the resource to, by using the directory browser. Clicking the

+

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 "Upload Archive" action, displays the upload archive dialog window.



The screenshot shows the 'CMS Administration' window with the 'Upload Archive' dialog. On the left, under 'Content Directory', there is a tree view with 'Root Folder' and 'default'. The main area has 'Destination: /default' and 'Language: English' in dropdown menus. Below these is a 'Browse...' button and an 'Upload' button.

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 folders

Clicking on the "Export Folder" action, displays the export archive dialog window.



The screenshot shows the 'CMS Administration' window with the 'Export Folder' dialog. On the left, under 'Content Directory', there is a tree view with 'Root Folder' and 'default'. The main area has 'Export Folder: /default' and 'Language: English' in dropdown menus. Below these is an 'Export Folder' button.

The export folder 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

**CMS Administration**

Use the CMS Administration portlet to manage the content of your portal.

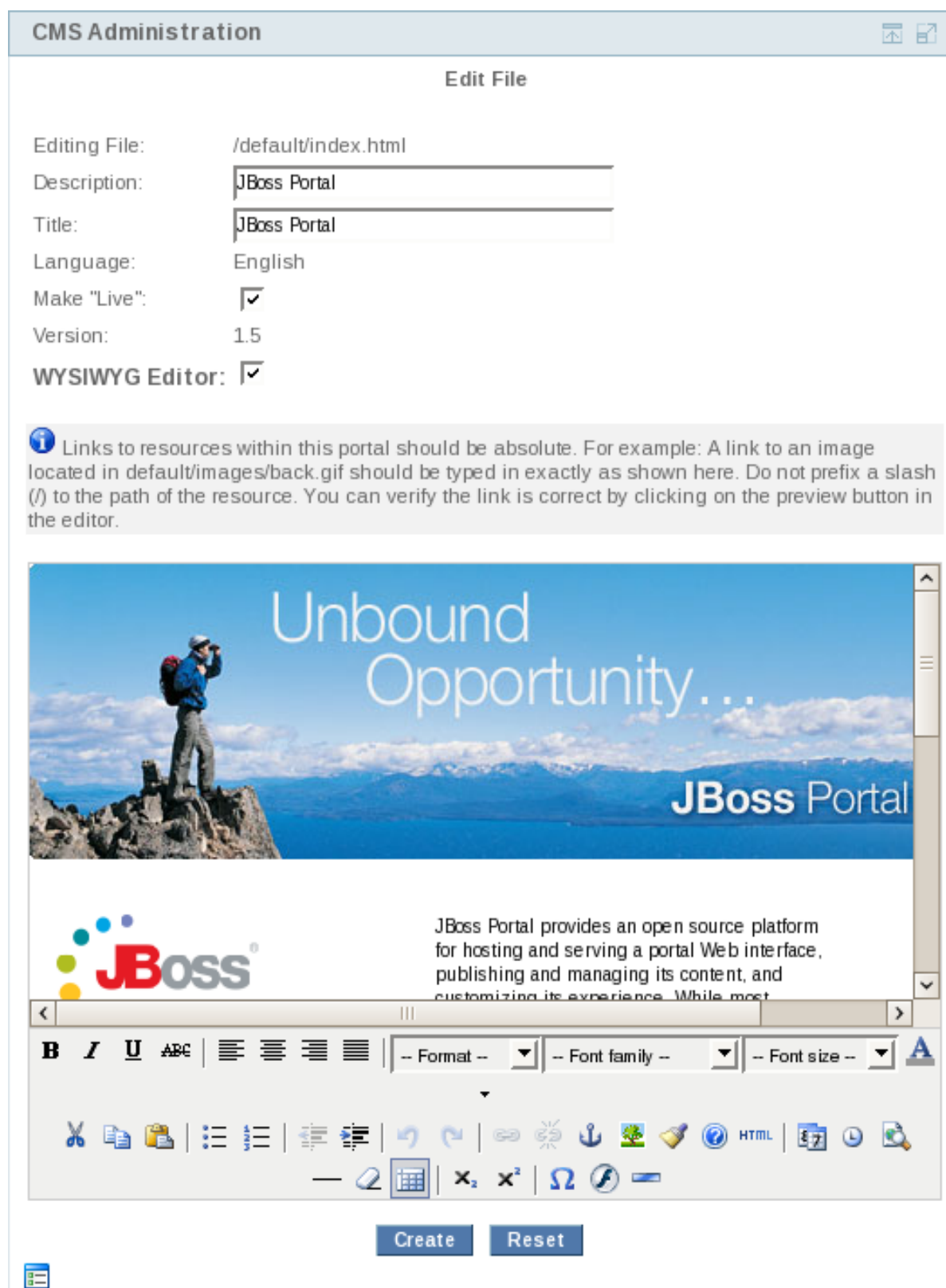
Browsing: [Home](#) > [default](#) > [index.html](#)

Select Action ▾

English

Type	Size	Version	Created	Modified	Title
<a href="#">text/html</a>	2kb	1.0	06/27/07 12:20	06/27/07 12:20	JBoss Portal
<a href="#">text/html</a>	2kb	1.1	06/27/07 17:14	06/27/07 17:14	JBoss Portal
<a href="#">text/html</a>	2kb	1.2	06/27/07 17:14	06/27/07 17:14	JBoss Portal
<a href="#">text/html</a>	2kb	1.3	06/27/07 17:15	06/27/07 17:15	JBoss Portal
<a href="#">text/html</a>	2kb	1.4	06/27/07 17:15	06/27/07 17:15	JBoss Portal
<a href="#">text/html</a>	2kb	1.5	06/27/07 17:15	06/27/07 17:15	JBoss Portal

Clicking on the "text/html" link, 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

HTML

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.

### 3.2.12. Securing Resources

Administrators are able to apply permissions settings to any folder or file in the CMS. These permissions on a specific node, can be applied on a per-Role and/or per-User basis.

The security dialogue is accessed by navigating to the node you want to secure and selecting *Secure*.

The screenshot displays the 'CMS Administration' portlet. At the top, it says 'Use the CMS Administration portlet to manage the content of your portal.' Below this is a search bar with a 'Search' button. The breadcrumb path is 'Browsing: Home > default'. A dropdown menu titled 'Select Action' is open, showing options: 'Create Folder', 'Create File', 'Upload File', 'Upload Archive', 'Export Folder', 'Secure', 'Pending Items', 'Copy', 'Move', and 'Delete'. The 'Secure' option is highlighted. In the background, a table lists files with columns for 'Action', 'Created', and 'Modified'. The 'Action' column contains dropdown menus with 'Go' buttons. The 'Created' and 'Modified' columns show the date '06/28/07 12:48'. At the bottom right, it says 'Powered by JBoss Portal'.

Action	Created	Modified
new [Go]	06/28/07 12:48	06/28/07 12:48
new [Go]	06/28/07 12:48	06/28/07 12:48
new [Go]	06/28/07 12:48	06/28/07 12:48
new [Go]	06/28/07 12:48	06/28/07 12:48
new [Go]	06/28/07 12:48	06/28/07 12:48

You should then be presented with a screen that allows you to assign read, write, and manage privileges on the selected node for selected Roles or specific Users.

CMS Administration

Secure Node

Configure security restrictions on node: /

Set Read Permissions

Anonymous

Users

Administrators

Select Roles that have access to this node.  
(You may select multiple roles by using CTRL+click on the role names.)

user

admin

Select Users that have access to this node.  
(You may select multiple users by using CTRL+click on the user names.)

Set Write Permissions

Anonymous

Users

Administrators

Select Roles that have access to this node.  
(You may select multiple roles by using CTRL+click on the role names.)

user

admin

Select Users that have access to this node.  
(You may select multiple users by using CTRL+click on the user names.)

Set Manage Permissions

Anonymous

Users

Administrators

Select Roles that have access to this node.  
(You may select multiple roles by using CTRL+click on the role names.)

user

admin

Select Users that have access to this node.  
(You may select multiple users by using CTRL+click on the user names.)

Secure

There are three main security settings for every node in the CMS.

- **Read Permissions:** Assigned roles/users can view the resource.
  - **Write Permissions:** Assigned roles/users are able to edit the resource, or create nodes within it (as is the case for folders)
  - **Manage Permissions:** These permissions include: copy, move, delete, and exporting.
- Adminsitrating and assigning permissions on a selected node is as simple as selecting which Roles and/or Users you want to allow to have a specific permission.

### 3.2.13. Content Publish/Approval Workflow

When the Publish/Approval Workflow service is activated on the CMS, any requests for publishing new content or making updates to existing content requires an Approval process before going

"Live". You can specify a list of Portal Roles that can act as Approvers who can authorize/deny the publishing of content in the CMS.

When a content is created in the CMS, the screen should show an Pending Queue of Approvals for that particular content as shown below in the screen. The content waiting in this queue is not accessible for "Live" usage.

CMS Administration

Use the CMS Administration portlet to manage the content of your portal.

Browsing: [Home](#) > [default](#) > index.html

Select Action ▾

English

Type	Size	Version	Created	Modified	Title
text/html	2kb	1.0	06/28/07 12:48	06/28/07 12:48	JBoss Portal

Pending Approval Queue

Type	Size	Created	Created By	Action
text/html	2kb	06/28/07 12:53	admin	<a href="#">Approve</a> <a href="#">Deny</a>

The user's who are designated as Approvers can view the CMS pending queue by clicking the **Pending Items** link in the flyout menu. The Pending Queue screen is as follows:

CMS Administration

Use the CMS Administration portlet to manage the content of your portal.

Browsing: [Home](#) > [default](#) > index.html

Pending Approval Queue

Location	Type	Created	Created By	Action
<a href="#">/default/index.html</a>	text/html	06/28/07 12:53	admin	<a href="#">Approve</a> <a href="#">Deny</a>
<a href="#">/default/Test</a>	text/plain	06/28/07 12:52	admin	<a href="#">Approve</a> <a href="#">Deny</a>





# Administration - Users and Roles

Roy Russo

Emanuel Muckenhuber

This chapter covers the administrator functions made available by the User management portlet. For end-user operation, see: [Section 1.2.3.2, “Identity User Portlet”](#). Administrative functions are available once you are logged in with the proper credentials (admin/admin), then going to the [Section 1.4, “Admin Portal”](#) and then the Members Page tab. You can change between user and role management by clicking on the corresponding links in the top of the portlet.

## 4.1. Managing Users

This section covers the user management of the IdentityUserManagementPortlet which is displayed by default. For role management please see [Section 4.2, “Managing Roles”](#).

The screenshot shows the JBossPortal interface. At the top, there's a navigation bar with 'CMS', 'Members' (selected), 'WSRP', and 'Home' tabs. On the right, it says 'Logged in as: admin' and provides links for 'Dashboard', 'Portal', 'Copy to my dashboard', and 'Logout'. Below the navigation bar, there are two tabs: 'User Management' (selected) and 'Role Management'. The 'User Management' section includes a search bar labeled 'Search users' and a button labeled 'Create new user account'. Below this is a 'Matrix' section showing 'Registered users' with a count of '2'. At the bottom, there's a 'Subscription Modes' table.

Subscription Modes	
Subscription mode	E-Mail validation and admin approval.
Admin subscription mode	Automatic - no e-mail validation, no admin approval.

Powered by JBoss Portal

The Members page in the [Section 1.4, “Admin Portal”](#).


### 4.1.1. Actions


The first page of the user management portlet displays some user related actions (eg. Search users, Create new user account) and some additional information (e.g. Registered users and Subscription mode). The registered users represent the count of all registered users and the subscription mode describes the required tasks for registering a user (i.e. first e-mail validation and then approval by the administrator). The *Subscription mode* symbolizes the mode used in the User portlet. The *Admin subscription mode* represents the mode used in the User management portlet.

User Management

Role Management

User Management

 Search users

 Create new user account

Matrix

Registered users

2

Subscription Modes

Subscription mode

E-Mail validation and admin approval.

Admin subscription mode

Automatic - no e-mail validation, no admin approval.

The User management portlet.

### 4.1.1.1. Searching for Users

For searching users click on the link *Search users* and then type a partial username in the form text field, to search for usernames matching that criteria.

User Management









Role Management

User Management

Search users

Search users

10

Username	E-Mail	Firstname	Lastname	Enabled	Actions
admin	admin@portal.com			<input checked="" type="checkbox"/>	 Edit user    Roles    Disable    Delete
user	user@portal.com			<input checked="" type="checkbox"/>	 Edit user    Roles    Disable    Delete

The search users page.

### 4.1.1.2. Updating User Profiles

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

User Management

Role Management

User Management

Edit profile

user

Username

user

E-Mail \*

Password

[Reset password](#)

General Preferences

Time zone offset

Theme

Locale

Personal Information

Firstname

Lastname

Location

Editing a users profile.

#### 4.1.1.3. Updating User Roles

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

User Management

Role Management

User Management

Assign roles

user

☐ Administrators

☒ Users

Submit

Cancel

Assign roles to a user.

### 4.1.1.4. Creating Users

Clicking on the *Create User Account* link on the main UserPortlet view, allows administrators to instantly create new users.

The screenshot shows a web interface for user management. At the top, there are two tabs: 'User Management' and 'Role Management'. Below the tabs, there is a section titled 'User Management' with a sub-section 'Basic user information'. This section contains four form fields: 'Username \*', 'E-Mail \*', 'Password \*', and 'Confirm Password \*'. The 'Username' field contains the text 'emuckenh', the 'E-Mail' field contains 'emuckenh@redhat.cor', and both the 'Password' and 'Confirm Password' fields contain seven asterisks. Below the form fields, there is a note: '\* indicates a required field.' At the bottom right of the form, there are two buttons: 'Submit' and 'Cancel'.

User Management	
Basic user information	
Username *	emuckenh
E-Mail *	emuckenh@redhat.cor
Password *	*****
Confirm Password *	*****
* indicates a required field.	
<input type="button" value="Submit"/> <input type="button" value="Cancel"/>	

Creating a user in the User management portlet.

### 4.1.1.5. Pending users

Click on the *Show pending registrations* link to show all registrations with validated e-mail addresses. You can approve or reject each user by clicking on the corresponding action or click on *select all* to approve or reject all selected users.

User Management
Role Management

User Management > Pending registrations

	Id	Username	E-Mail	Registration Date	Actions
<input type="checkbox"/>	3	jviet	julien@jboss.com	Fri Sep 21 12:14:41 CEST 2007	approve    reject
<input type="checkbox"/>	2	theute	theute@redhat.com	Fri Sep 21 12:13:56 CEST 2007	approve    reject
<input type="checkbox"/>	1	emuckenh	emuckenh@redhat.com	Fri Sep 21 12:13:13 CEST 2007	approve    reject

select all | unselect all

Approve selected
Reject selected
Cancel

Approve or reject pending registrations.



### Note

By default the subscription modes are set to *automatic* and users will be created automatically. Furthermore the link to *Show pending registrations* will only be displayed if a user needs to be approved by the administrator.

## 4.2. Managing Roles

The User management portlet is also responsible to create and edit roles and it is accessible once logged in - as described in previously - when clicking on the *role management* link in the User management portlet.

### 4.2.1. Introduction

A role will be used to grant different permission levels to different portlets, pages, or portal instances. A user can have several roles.

User Management
Role Management

Role Management

Role	Display name	Actions
Admin	Administrators	Edit role    Members    Delete
User	Users	Edit role    Members    Delete

Create new role

Role management.

## 4.2.2. Actions

The User management portlet also provides several actions related to role management, which are described in the following sections.

### 4.2.2.1. Creating Roles

Creating new roles, is accomplished by first clicking on the *Create new role* link in the portlet.

The screenshot shows the 'User Management' portlet with the 'Role Management' tab selected. Below the tab, there is a breadcrumb trail: 'Role Management > Create role'. The form contains two input fields: 'Role' and 'Display name'. At the bottom right, there are 'Submit' and 'Cancel' buttons.

Create a new 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

Editing roles, is accomplished by clicking on *Edit role* in the row of the role you want to edit.

The screenshot shows the 'User Management' portlet with the 'Role Management' tab selected. Below the tab, there is a breadcrumb trail: 'Role Management > Edit role > User'. The form contains two input fields: 'Role' (with the value 'User') and 'Display name' (with the value 'Users'). At the bottom right, there are 'Submit' and 'Cancel' buttons.

Edit an existing role.

While editing a role, you just need to pick an existing role then change the display name.

### 4.2.2.3. Editing Role Members

Editing role members, is accomplished by first clicking the *Members* link at the role management page for the role you would like to modify.



User Management

Role Management

Role Management

Members

User

Username	E-Mail	First name	Last name	Enabled	Actions
user	user@portal.com			<input checked="" type="checkbox"/>	 Edit user    Roles

Search users

Search

10

Show the members of an existing role.

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

### 4.2.2.4. Deleting Roles

Deleting roles is accomplished by clicking the *Delete* link for the role you would like to remove.

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