



User Documentation

Nuxeo Platform 5.5

Nuxeo Document Management Module

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Document Management - User Guide

Nuxeo Document Management is the document management module of the Nuxeo Platform. It provides organizations with the features they need to enable their teams to work more efficiently either on a project-basis or on longer term business processes.

This user guide provides information and step-by-step instructions to help you use the Document Management module of the Nuxeo Platform. Collaborative work takes place in [workspaces](#), where you can create documents, share and edit them. When documents are ready for distribution, you can publish them in [sections](#), which are the spaces devoted to content distribution.

For administrators, the integrated Admin Center provides tools to manage, monitor and extend the application with plugins and customizations.

You can come and discuss Nuxeo DM with other users on our [discussion forum](#).

Download



Download this documentation in PDF.

Document Management 5.5 User Guide

- Document Management concepts
- Browsing content in Document Management
 - Accessing content
 - Changing content presentation
 - Searching Nuxeo DM
 - User home
 - Using Nuxeo gadgets from other applications
- Working in workspaces
 - Working with workspaces
 - Working with documents
 - Notes
 - Files
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 - Working using drag and drop
 - Desktop & Office Suites Integration
 - Relations
 - Comments
 - Annotations
 - Tags
 - Document's history
 - Alerts
 - Workflows
 - Forums
 - Pictures
 - Websites and blogs
 - Email folders
 - Using Workspace Templates
 - Exporting documents
- Working in sections
 - Publishing documents
- Managing Nuxeo DM
 - Managing access rights
 - Managing groups
 - Managing users
 - Managing vocabularies
 - Managing dashboards
 - Managing authentication with other applications

Document Management concepts

Nuxeo DM is the Nuxeo Platform document management module. It distinguishes collaborative work and content distribution.

The general concept is this: documents are created, edited, possibly approved in workspaces. When finished, they are published in sections. When obsolete, they're unpublished from sections. Actions users can perform on documents are determined by access rights given by spaces managers. To encourage collaborative work and information sharing, Nuxeo DM proposes several collaborative services, such as forums, blogs and websites.

On this page

- [Available spaces](#)
- [Access rights](#)
- [Groups of users](#)
 - [Related pages](#)

Available spaces

Tabs are available on top the of the page, that give access to different environments.

- The **Home** tab is where the user can find all the information that concern him: his dashboard to get a quick access to documents, and that he can customize with internal and external gadgets, the summary of his notification subscriptions, see his profile, etc.
- The **Document Management** tab is the main tab. This is where the majority of user's activity within the DM module will occur since it's where users can work on documents and browse your application domains, workspace, sections, etc.

Administrators have two extra tabs:

- The **Admin Center** tab, from which they can [manage the application](#).
- The **Studio** tab, which provides access to Nuxeo Connect and [Nuxeo Online Services](#), the online customization and configuration environment.

Collaborative work takes place in **workspaces**, where users can [create](#) and [edit documents](#). [Workspaces](#) are designed to make capture, sharing and editing of documents easier using desktop integration features, [comments](#), [annotations](#). In the mean time, [documents history and versioning](#), [relations](#), [workflows](#) and [alerts](#) enable you to build a coherent and controlled documents structure.

To help users create the workspaces in which they work, you can create workspaces **templates** and prepare the structure that will be applied to workspaces used in [template-based workspaces](#).

When documents are finished and ready, they are published in **sections**. Traditionally opened to a wider audience than workspaces, sections are dedicated to content distribution and communication and are designed for content consultation. That is why you won't be able to change documents (edit or move them) in sections : documents published in sections are frozen versions of workspace documents. [Publishing](#) is controlled using a workflow, that requires publishing requests to be [approved](#) so documents can be seen in sections.




Sections, workspaces and templates are grouped in domains. A domain can be considered as a mini-application in Nuxeo or a root in the application. Typically you can use domains to open the application to two or more very different populations of users. For instance, you can have an "intranet" domain and an "extranet" domain. Domains are can be totally independent or not, depending on the access rights you set on each domain.

Access rights


Access to documents and the actions allowed are determined by access rights. Some users will then be allowed to only read documents, when others will be able to edit documents or to manage spaces and documents.

The available access rights are:

Right	Actions in workspaces	Actions in sections
Read	Consult content Comment documents Annotate documents Tag documents	Consult content Comment documents Annotate documents Tag documents + Can ask for publishing actions
Version	Manage the archived versions of a document (view, restore, delete) + Read actions	
Write	Create documents Edit documents Add / remove relations Start a workflow + Remove actions + Version actions + Read actions	Create sections Approve document publishing Unpublish documents + Read actions + Remove actions

Manage	Manage access rights Set alerts to other users Apply a preset look on documents Manage deleted documents + Write actions + Read actions	Manage access rights Set alerts to other users Apply a preset look on documents Manage deleted documents + Write actions + Read actions
Remove	Delete documents (this permission is included in Write right) <div>  The Remove permission is most intended to be denied, so as to restrict the actions available to users with "Write" permission. </div>	Delete sub-sections (this permission is included in Write right) <div>  The "Remove" permission is intended to be denied, so as to restrict the actions available to users with "Write" permission. </div>
Can ask for publishing		Submit documents for publishing (this permission is included in Read right) <div>  The "Can ask for publishing" permission is intended to be denied, so as to restrict the actions available to users with "Read" permission, typically to enable users to see the content of a section without being able to publish in the section. </div>
Comment	Add comments on websites	
Moderate	Moderate comments on websites and blogs if moderation is set to "Beforehand".	

Access rights are given on folderish spaces (workspaces, sections, templates, domains, but also folders, blogs, websites etc) and are inherited in the sub-spaces.


 On a standard Nuxeo application, members are all granted "read" right at the application's root by default.

Groups of users

To make access rights management easier, you can [create groups of users](#). Instead of giving (or denying) access rights to single users and repeat the same operations several times, you can give several users the same right in one single manipulation by using a group.

Default groups are:

- administrators*: users in this group are the administrators of the application. They are in charge of managing the application and can access the Admin Center, edit the vocabularies, manage users and groups, and manage the themes applied in the application.
- members*: users in this group are the non-administrator users of the application.

 Users must be in one of these 2 default groups to be able to access content.

You can [create](#) as many groups as needed.

Related pages

-  [Document Management concepts](#)
-  [Working in sections](#)
-  [Managing users](#)
-  [Managing groups](#)
-  [Managing access rights](#)
-  [Managing a workspace](#)
-  [Creating a workspace](#)

Deleting a workspace

Editing a workspace

Browsing content in Document Management

To help you find accurate documents, the Document Management module features several different ways to access documents:

- The different navigation trees, the tag cloud, or the dashboard enable you to [browse content according to different axis](#).
- You can also use the [simple, faceted or advanced search](#).

For each of the available means to access documents, you can [customize the informations displayed](#).

Accessing content

There are different ways to access content in Nuxeo DM. You can either use one of the navigation trees available, the tag cloud or your dashboard.

On this page

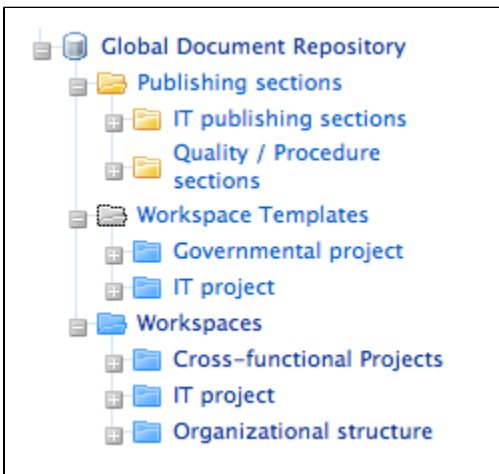
- [Navigation trees](#)
 - [Navigation through folders](#)
- [Virtual navigation](#)
- [Tag Cloud](#)
- [Dashboard](#)
 - [Related pages](#)

Navigation trees

Several navigation trees are available so that you can access your documents either by going through folders (physical navigation) or using virtual navigation.

Navigation through folders

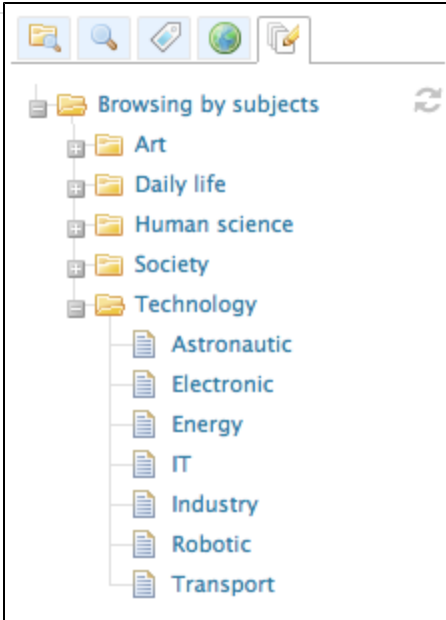
The default navigation tree displayed on the left hand side of the pages is the folders navigation tree. It displays all the domain structure from the root. It enables you to easily access any space in the application structure.



Virtual navigation

Another way to access documents is using virtual navigation. Virtual navigation consists in using a navigation tree based on metadata to access documents. Metadata are informations about the documents, like the document's theme for instance, or its last modification date.

By default, two virtual navigation trees are available in Nuxeo DM: geographical cover navigation tree and subject navigation tree. You can use them for instance to access all the documents about the IT subject.



You can replace or edit existing virtual navigation trees with your organization's own vocabularies. Thus, you'll be able to adapt Nuxeo DM to your organization's structure and way of working.

See also pages [Editing the document's content and metadata](#) and [managing vocabularies](#).

Tag Cloud

Nuxeo DM includes [tagging of documents](#), which enables you to apply your own labels on documents. The tag cloud lists all tags on documents, with their size growing as the tag is applied on several documents.

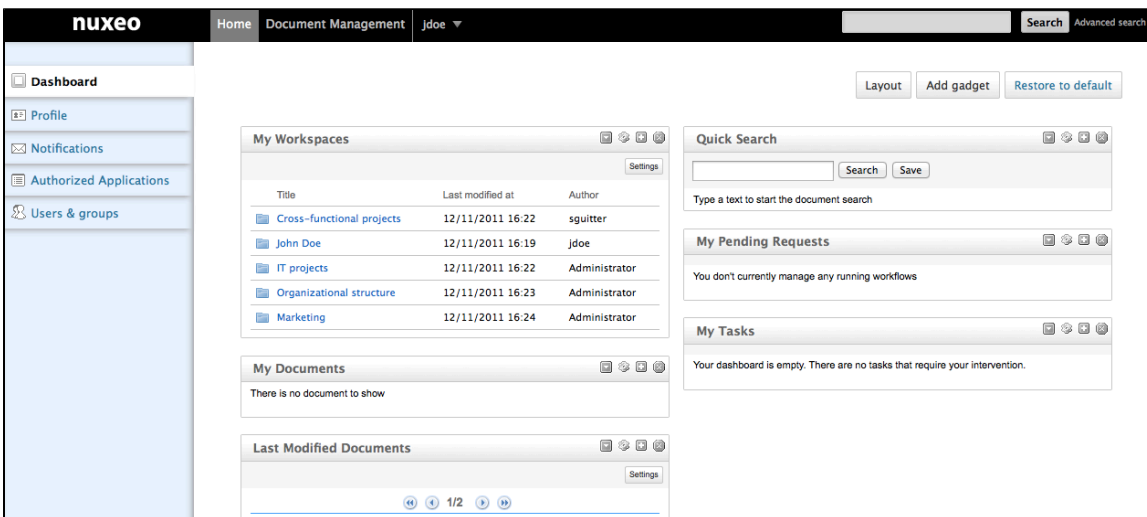


To see all documents tagged with the same label, click on the tag in the tag cloud.

Dashboard

You can also access documents using your dashboard.

Every user has a dashboard that he can [customize](#). The purpose of the dashboard is that the user can have a summary of the application's activity on one page.



To access your dashboard, click on the **Home** main tab. Your dashboard is the default tab of your Home.

Related pages

Accessing content

Tags

Changing content presentation

Managing dashboards

Managing vocabularies

Editing a workspace

Editing content

• Changing content presentation

You can change the way content is presented:

- in the folderish repositories (workspaces, folders, sections)
- in your dashboard

On this page

• Presentation options in folders

- Customizing your dashboard

• Changing the dashboard layout

- Organizing your widgets

- Adding and removing widgets

- Editing widgets

- Related pages

Presentation options in folders

Different views of the content lists are available in workspaces, folders and sections:

- list view (default view):

Functional documentation

Content Alerts History

New Import a file Filter Items/page 20

<input type="checkbox"/>	Title	Modified	Last contributor	Version	State
<input type="checkbox"/>	Nuxeo DAM 1.0 User Guide	12/11/2011	John Doe	0.0	Project
<input type="checkbox"/>	Nuxeo DAM 1.1 User Guide	12/11/2011	John Doe	0.0	Project
<input type="checkbox"/>	Nuxeo DM 5.3.2 User Guide	12/11/2011	John Doe	0.0	Project
<input type="checkbox"/>	Nuxeo DM 5.4.0 User Guide	12/11/2011	John Doe	0.0	Project
<input type="checkbox"/>	Nuxeo DM 5.4.1 User Guide	12/11/2011	John Doe	0.0	Project
<input type="checkbox"/>	Nuxeo DM 5.4.2 User Guide	12/11/2011	John Doe	0.0	Project
<input type="checkbox"/>	Nuxeo Platform 5.5 User Guide	12/11/2011	John Doe	0.0	Project

Paste Add to worklist Copy Delete

- icons view:

Functional documentation

Content Alerts History

New Import a file Filter Items/page 20

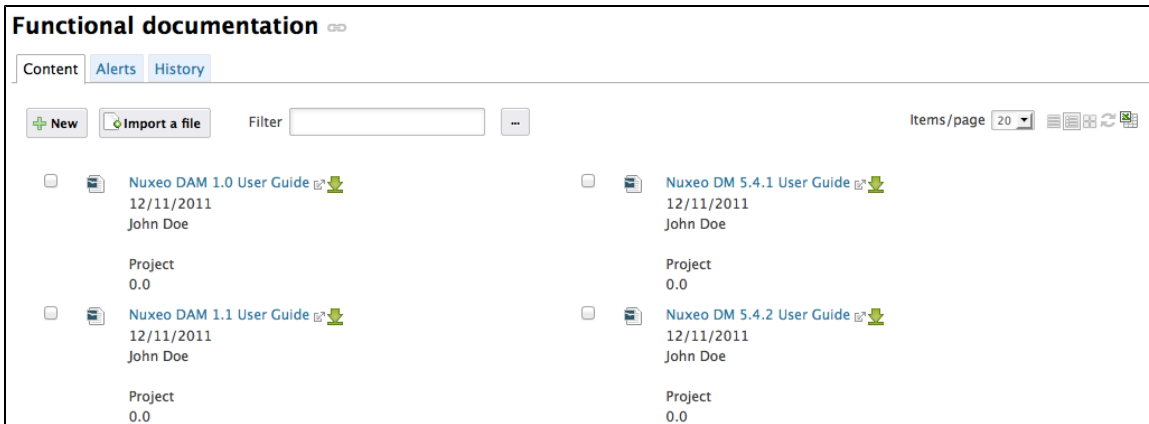
☐ Nuxeo DAM 1.0 User Guide

☐ Nuxeo DM 5.4.1 User Guide

☐ Nuxeo DAM 1.1 User Guide

☐ Nuxeo DM 5.4.2 User Guide

- compact view:



To change presentation:

Click on one of the icons displayed on the top right corner of **Content** tab:

- list view icon:
- icon view icon:
- compact view icon:

Customizing your dashboard

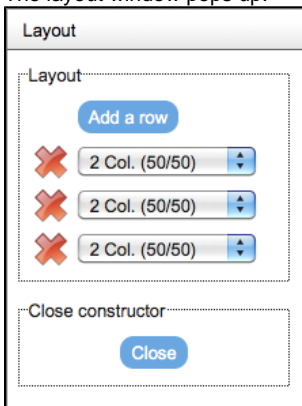
When you customize your dashboard, you can change the layout of the page, but you can also add, remove and edit the widgets displayed.

Changing the dashboard layout

To change your dashboard's layout:

1. From your dashboard, click on **Layout**.

The layout window pops up.

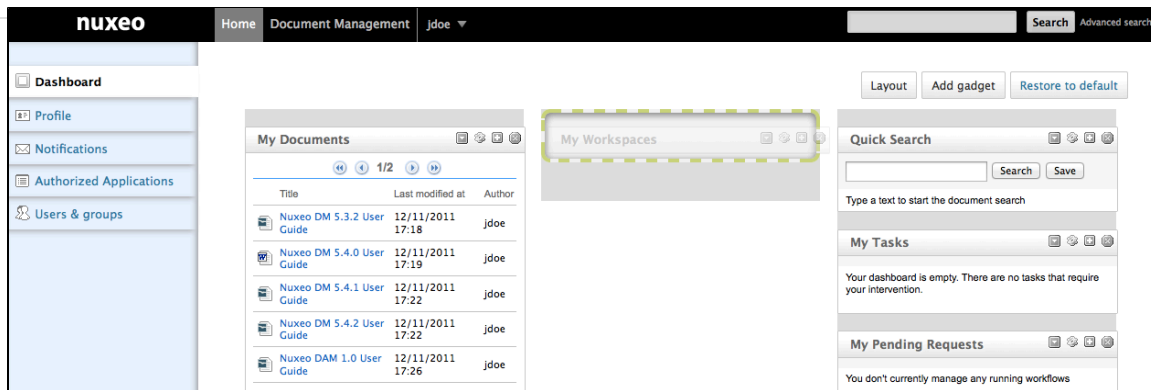


2. Determine the layout of your dashboard by adding or removing rows and selecting the columns proportions inside each row.
3. Click on **Close**.
The chosen layout is immediately applied.
Now you can reorganize your widgets in this layout.

Organizing your widgets

You can organize widgets the way you want in the applied layout. You can thus move widgets from a place to another (in another column, at the bottom or the top of the page, etc).

To move widgets, drag and drop them from a place to another.



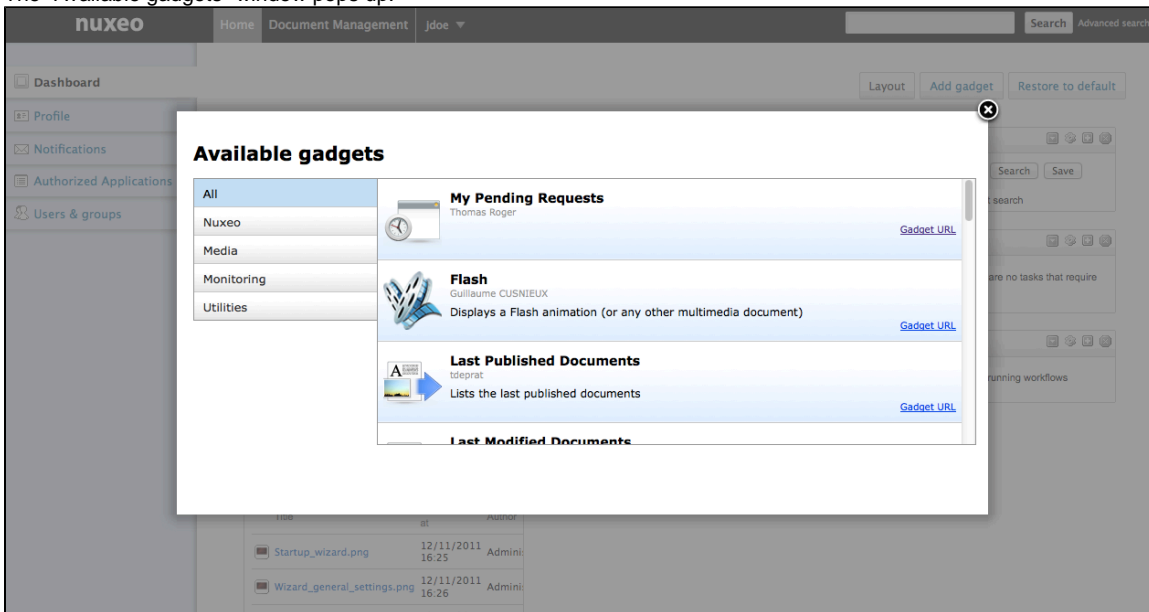
✓ You don't need to install Nuxeo's Drag and Drop extension to move widgets.

Adding and removing widgets

You can choose the widgets that are displayed on your dashboard.


To add a widget:

1. Click on the **Add gadget** button.
The "Available gadgets" window pops up.



2. Click on the gadget you want to display on your dashboard.
The gadget is immediately added on the first available slot of your dashboard.
3. Move the widget in the dashboard at the place you want it to be displayed.


To remove a widget from your dashboard:

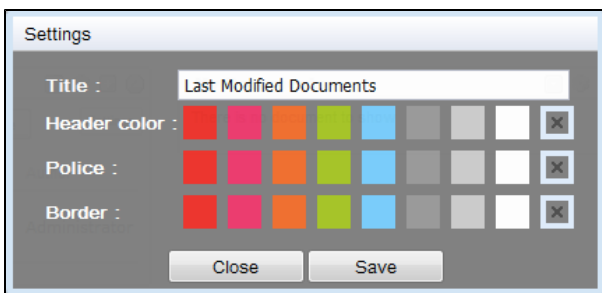
1. Click on the icon  of the widget you want to delete from your dashboard.
2. On the window that pops up, click **OK** to delete the widget.
The widget is removed from your dashboard.

Editing widgets

At any time, you can edit widgets. You can change their title or colors to change the look of your dashboard.

To edit a widget:

1. Click on the icon .
2. In the window displayed, change the widget's parameters.



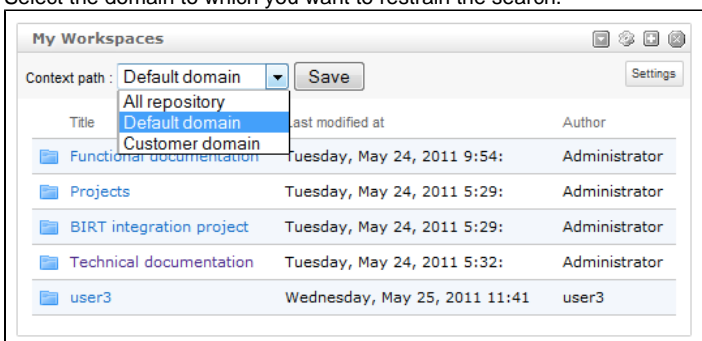
3. Click on **Save**.

You can also edit the settings of some Nuxeo's gadgets to indicate if the gadget should display documents from a specific domain of the application. By default, the search is done on the default domain. This setting is available on the following gadgets:

- My workspaces,
- Last modified documents,
- last published documents,
- my deleted documents.

To change the domain setting:

1. On the gadget, click on the **Settings** button displayed on the top right corner of the gadget.
A "Content path" drop down list is displayed on the left of the "Setting" button.
2. Select the domain to which you want to restrain the search.



Select "All repository" to search on all domains.

3. Click on the **Save** button.
The content of your gadget is refreshed according to your selection.

Related pages

- [Changing content presentation](#)
- [Managing dashboards](#)
- [Accessing content](#)

Searching Nuxeo DM

Nuxeo DM integrates a full text query engine, designed to recognize all the specific parameters the application provides.

Documents are indexed using their title, description, content (note field, attached files), and metadata.

Nuxeo DM provides several ways to search the content of the application:

- faceted search,
- simple search,
- advanced search.

It is also possible to [customize the search results presentation](#).

On this page

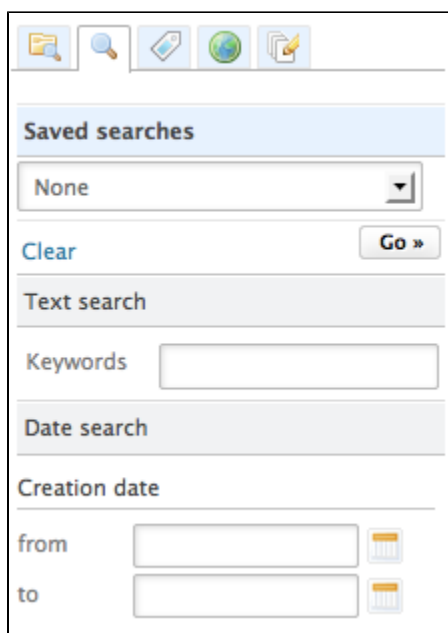
- Faceted search
 - Saving your faceted searches
 - Saving a search
 - Sharing a saved search
- Simple search
- Advanced search
- Exporting search results
- Customizing search results
 - Adding new search results columns
 - Removing search result columns
 - Changing search result sorting
 - Related pages

Faceted search

Faceted search is an easy way to browse the content of your application, by creating filters on the content of the application. You can filter content using:

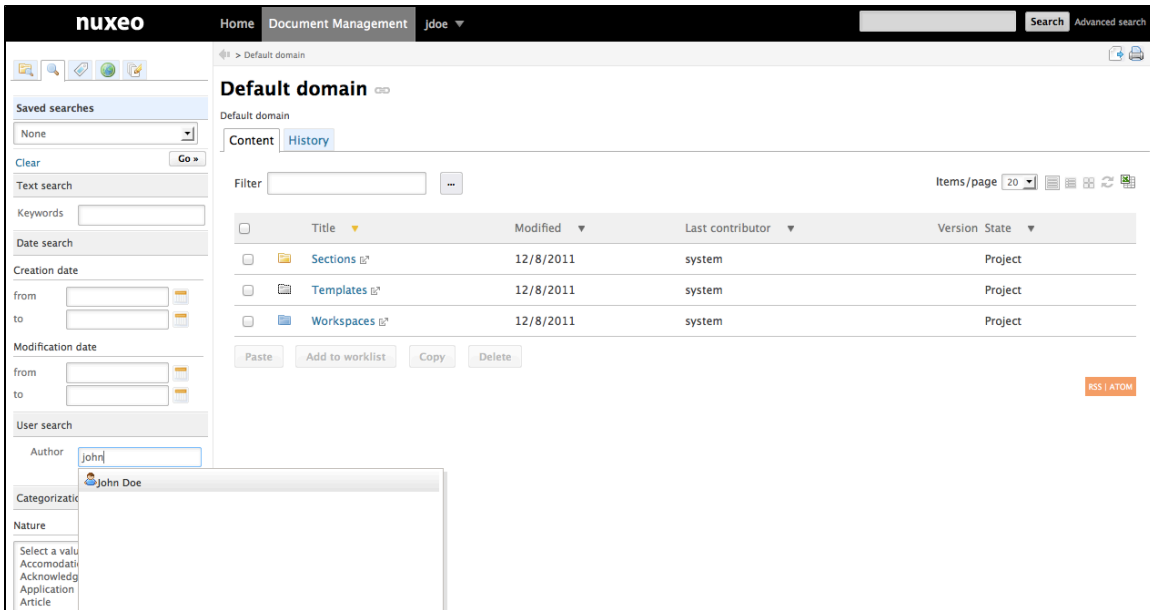
- keywords (full text search based on stemming, see [the simple search section](#) for more details on full text search)
- dates (creation and last modification dates)
- author
- documents categorization (nature, coverage, subjects of documents)
- location of the documents in the folders

Faceted search is available in the  tab of the left hand side of the page.



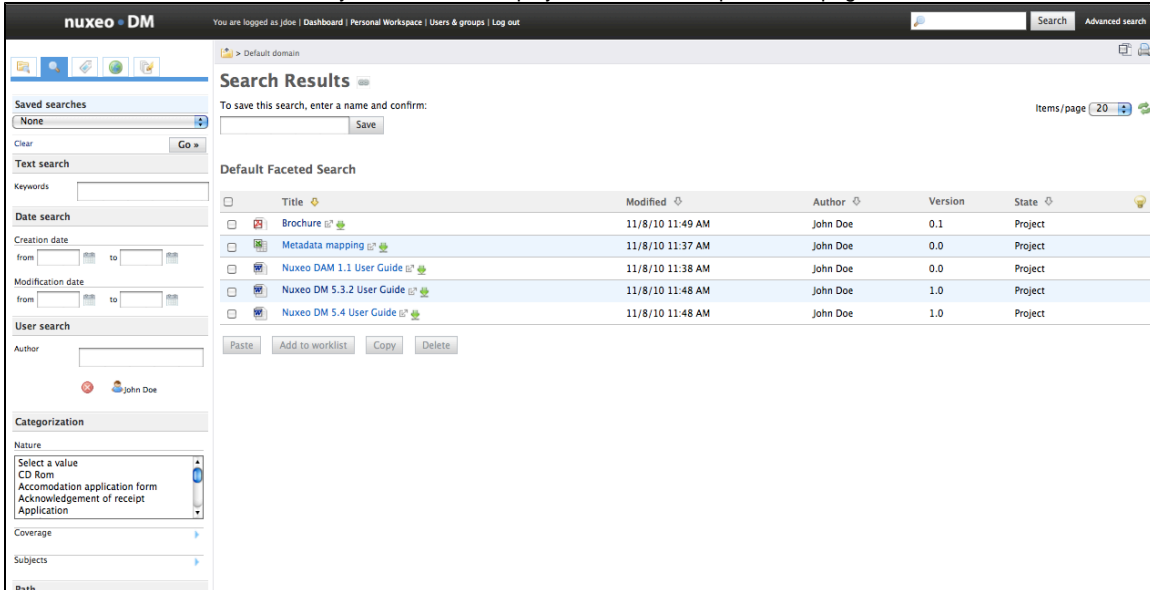
To browse the content of the application using faceted search:

1. In the Faceted Search tab, fill in the form with the properties of the documents you want to browse.
For instance, we only want the documents created by user John Doe.



- Click on the **Go** button.

The documents that were created by John Doe are displayed in the content part of the page.



- If needed, edit your filter criteria in the faceted search form that is still available. For instance, let's say we only want the documents created by John Doe that are "booklets".

None
Clear
Go
Text search
Keywords
Date search
Creation date
from
to
Modification date
from
to
User search
Author
John Doe
Categorization
Nature
Bank account details
Booklet
Card
CD Rom
Certificate
Coverage
Subjects

To save this search, enter a name and confirm:
Save
Items/page 20

	Title	Modified	Last contributor	Version	State
<input type="checkbox"/>	Brochure	12/11/2011	John Doe	0.0	Project
<input type="checkbox"/>	Functional documentation	12/11/2011	John Doe		Project
<input type="checkbox"/>	John Doe	12/11/2011	John Doe		Project
<input type="checkbox"/>	Nuxeo DAM 1.0 User Guide	12/11/2011	John Doe	0.0	Project
<input type="checkbox"/>	Nuxeo DAM 1.1 User Guide	12/11/2011	John Doe	0.0	Project
<input type="checkbox"/>	Nuxeo DM 5.3.2 User Guide	12/11/2011	John Doe	0.0	Project
<input type="checkbox"/>	Nuxeo DM 5.4.0 User Guide	12/11/2011	John Doe	0.0	Project
<input type="checkbox"/>	Nuxeo DM 5.4.1 User Guide	12/11/2011	John Doe	0.0	Project
<input type="checkbox"/>	Nuxeo DM 5.4.2 User Guide	12/11/2011	John Doe	0.0	Project
<input type="checkbox"/>	Nuxeo Platform 5.5 User Guide	12/11/2011	John Doe	0.0	Project
<input type="checkbox"/>	ppp	12/11/2011	John Doe		Project

Paste
Add to wishlist
Copy
Delete
RSS | ATOM

- Click on the **Go** button again.
The list of documents that answer to the two criteria filled in is refreshed.

None
Clear
Go
Text search
Keywords
Date search
Creation date
from
to
Modification date
from
to
User search
Author
John Doe
Categorization
Nature
Bank account details
Booklet
Card
CD Rom
Certificate
Coverage
Subjects

To save this search, enter a name and confirm:
Save
Items/page 20

Default Faceted Search

	Title	Modified	Last contributor	Version	State
<input type="checkbox"/>	Brochure	12/11/2011	John Doe	0.0	Project

Paste
Add to wishlist
Copy
Delete
RSS | ATOM

Saving your faceted searches

With faceted search comes the possibility to save your searches, so you can reuse them at anytime. You can also share these saved searches to make them available for other users.

- Only faceted searches can be saved.

Saving a search

When you save a search, you save the criteria of the search. This means that the results displayed when you reuse the search may be different from the results at the time you saved the search, as the content of the application may (and probably will) have changed. You can save as many searches you need. Saved searches are available in the faceted search tab, in the "Saved searches" drop down list. To load a search, just click on it in the list. It is automatically executed.

To save a search:

- Start a search using the faceted search form.
- When you are satisfied with the filter you have done, in the search results page, type a name for your search.

Default Faceted Search

To save this search, enter a name and confirm:

My documents

Items/page 20

<input type="checkbox"/>	Title	Modified	Last contributor	Version	State
<input type="checkbox"/>	Brochure	12/11/2011	John Doe	0.0	Project
<input type="checkbox"/>	Functional documentation	12/11/2011	John Doe		Project
<input type="checkbox"/>	John Doe	12/11/2011	John Doe		Project
<input type="checkbox"/>	Nuxeo DAM 1.0 User Guide	12/11/2011	John Doe	0.0	Project
<input type="checkbox"/>	Nuxeo DAM 1.1 User Guide	12/11/2011	John Doe	0.0	Project
<input type="checkbox"/>	Nuxeo DM 5.3.2 User Guide	12/11/2011	John Doe	0.0	Project
<input type="checkbox"/>	Nuxeo DM 5.4.0 User Guide	12/11/2011	John Doe	0.0	Project
<input type="checkbox"/>	Nuxeo DM 5.4.1 User Guide	12/11/2011	John Doe	0.0	Project
<input type="checkbox"/>	Nuxeo DM 5.4.2 User Guide	12/11/2011	John Doe	0.0	Project
<input type="checkbox"/>	Nuxeo Platform 5.5 User Guide	12/11/2011	John Doe	0.0	Project
<input type="checkbox"/>	ppp	12/11/2011	John Doe		Project

- Click on the **Save** button.

The search is saved. It is stored in your personal workspace, in a "Saved searches" that is automatically created by the system.

Saved Searches

Content Edit Alerts History Manage

Filter

Items/page 20

<input type="checkbox"/>	Title	Modified	Last contributor	Version	State
<input type="checkbox"/>	My documents	12/11/2011	John Doe	0.0	Project

It is now available in the **Saved searches** drop down list, in the "Your searches" part.

Saved searches

My documents

None

Your searches

My documents

All searches

Keywords

Date search

Creation date

from

to

Sharing a saved search

Saved searches are stored in your personal workspace, in a Saved Searches folder that is created automatically by the system the first time you save a search. This folder is a regular folder, in which you can perform the same actions as in a folder created manually. This enables you to organize your saved searched the way you want, and to share them.

To share a search:

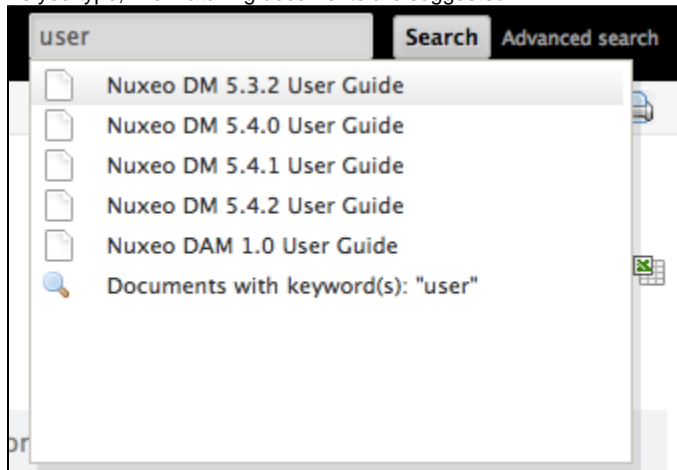
1. [Create a folder](#) in the "Saved searches" folder of your personal workspace.
2. Move the saved search you want to share in this new folder, using the clipboard or drag and drop.
3. Give the users you want to share the search with [access to the folder](#). They just need read right to use the search.

Simple search

Simple search can be accessed from any site page. At any time, you can search a document by typing keywords in the search box located at the upper right corner of the page.



As you type, five matching documents are suggested.



If the searched document is not suggested, click on the **Search** button to display all matching documents. Search results are displayed in a table. Click on the document's name to open it.

	Title	Modified	Last contributor	Version	State
<input type="checkbox"/>	Nuxeo DAM 1.0 User Guide	12/11/2011	John Doe	0.0	Project
<input type="checkbox"/>	Nuxeo DAM 1.1 User Guide	12/11/2011	John Doe	0.0	Project
<input type="checkbox"/>	Nuxeo DM 5.3.2 User Guide	12/11/2011	John Doe	0.0	Project
<input type="checkbox"/>	Nuxeo DM 5.4.0 User Guide	12/11/2011	John Doe	0.0	Project
<input type="checkbox"/>	Nuxeo DM 5.4.1 User Guide	12/11/2011	John Doe	0.0	Project
<input type="checkbox"/>	Nuxeo DM 5.4.2 User Guide	12/11/2011	John Doe	0.0	Project
<input type="checkbox"/>	Nuxeo Platform 5.5 User Guide	12/11/2011	John Doe	0.0	Project

The simple search is actually faceted search on full text. The faceted search tab is automatically selected to enable you to refine your search, and you can save your search.

Full text search uses stemming. The Stemming search option will return the assets containing words that have the same stem as the word you entered into the "Keywords" field.

If you enter the word "Reading", you will find the assets containing in their text metadata "Read", "reads" etc.

This is not the same thing as a search with a wildcard like "*".

The application's search engine uses boolean operators, to enable you to associate keywords. The Boolean operators used by the search engine are:

- **+**: the word after the + symbol must be in the found documents.
Example: you are looking for documents that must contain "Nuxeo" and may contain "release". Type *release +Nuxeo*.
- **-**: The keyword after this symbol must not be in the found documents.
Example: you are looking all the documents referring to the Nuxeo but not about meetings. Type *Nuxeo -meeting*.

Advanced search

Advanced search enables you to search a document using more precise parameters. You can for instance select metadata of the searched document or the date of specific events such as publication, creation.

To search documents using detailed criteria:

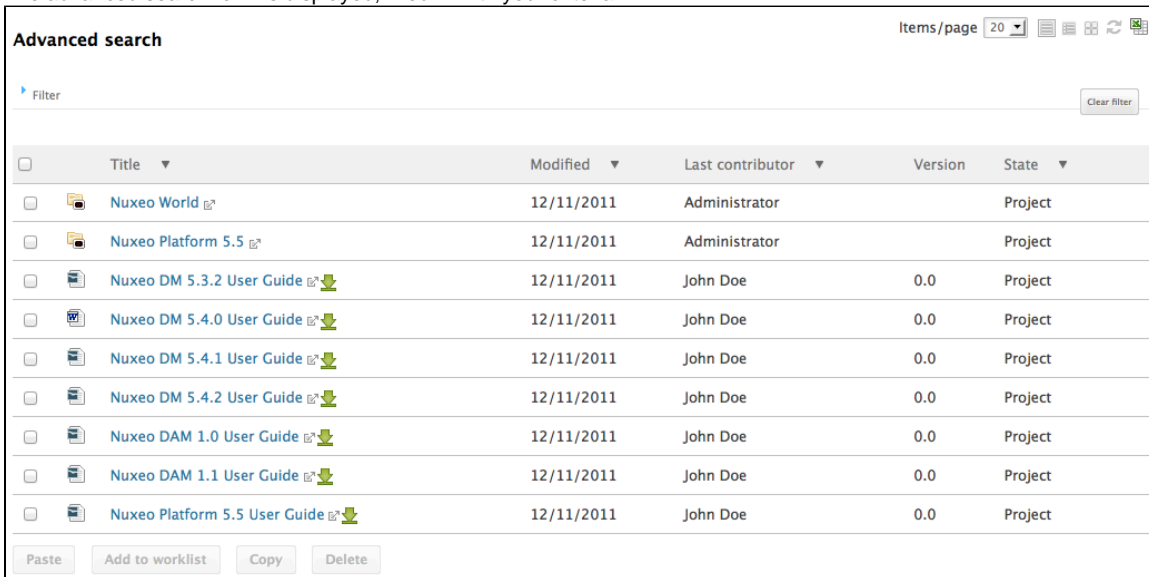
1. Click on the **Advanced search** link, located next to the search box.



2. Type your criteria in the **Search criteria** form.
3. Possibly, [change the search results columns](#).
4. Click on the **Search** button.
Search results are displayed in a table. Click on the document's name to open it.

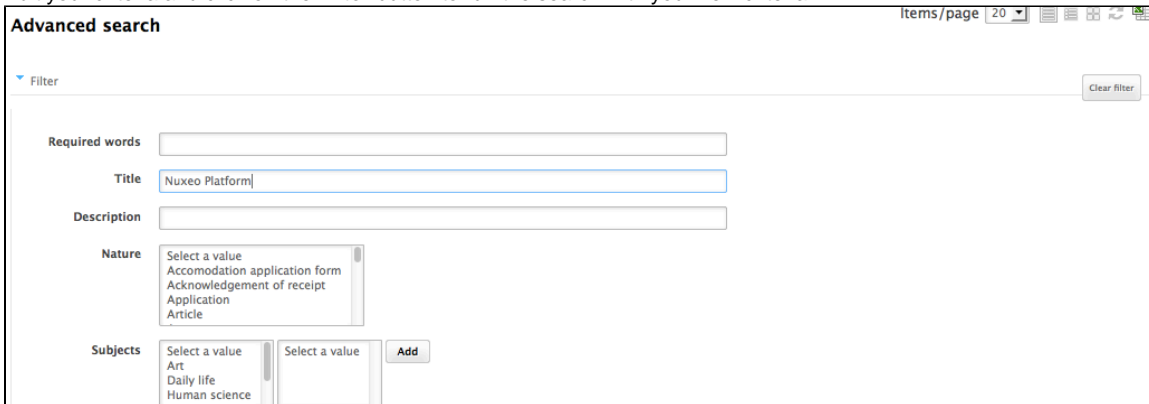
You can edit advanced search results directly from the search results page, using a filter displayed on top of the search results.

1. Click on the **Filter** link displayed on top of search results to unfold it.
The advanced search form is displayed, filled in with your criteria.



	Title ▼	Modified ▼	Last contributor ▼	Version	State ▼
<input type="checkbox"/>	Nuxeo World	12/11/2011	Administrator		Project
<input type="checkbox"/>	Nuxeo Platform 5.5	12/11/2011	Administrator		Project
<input type="checkbox"/>	Nuxeo DM 5.3.2 User Guide	12/11/2011	John Doe	0.0	Project
<input type="checkbox"/>	Nuxeo DM 5.4.0 User Guide	12/11/2011	John Doe	0.0	Project
<input type="checkbox"/>	Nuxeo DM 5.4.1 User Guide	12/11/2011	John Doe	0.0	Project
<input type="checkbox"/>	Nuxeo DM 5.4.2 User Guide	12/11/2011	John Doe	0.0	Project
<input type="checkbox"/>	Nuxeo DAM 1.0 User Guide	12/11/2011	John Doe	0.0	Project
<input type="checkbox"/>	Nuxeo DAM 1.1 User Guide	12/11/2011	John Doe	0.0	Project
<input type="checkbox"/>	Nuxeo Platform 5.5 User Guide	12/11/2011	John Doe	0.0	Project

2. Edit your criteria and click on the **Filter** button to run the search with your new criteria.



Search results are updated below the filter form.

Format
Path
Language
Search also for deleted documents?

<input type="checkbox"/>	Title ▼	Modified ▼	Last contributor ▼	Version	State ▼
<input type="checkbox"/>	Nuxeo Platform 5.5 ↗	12/11/2011	Administrator		Project
<input type="checkbox"/>	Nuxeo Platform 5.5 User Guide ↗	12/11/2011	John Doe	0.0	Project

Click on the **Clear filter** link on the left of the filter to empty the filter form and search for all documents.

Exporting search results

You can export the results of your search as a CSV or PDF document. This enables you to save the search results to consult them later.

When you export search results, the exported document contains the same informations as the search results table. The default informations are the document's title, and its creation and modification dates.

To export search results, click on the icon displayed in the top right corner of the main area, next to the refresh icon.

Customizing search results

You can choose which informations are displayed on the results page. The default informations are the document's title, its creation date and its modification date. You can add or remove fields from search results display.

All users can customize search results columns.

Adding new search results columns

To add a new search results column:

- Click on the **Advanced search** link in the top rights corner of the page.
The **Search results columns** form is displayed below the **Search criteria** form.

Search results

Search result columns

Available columns

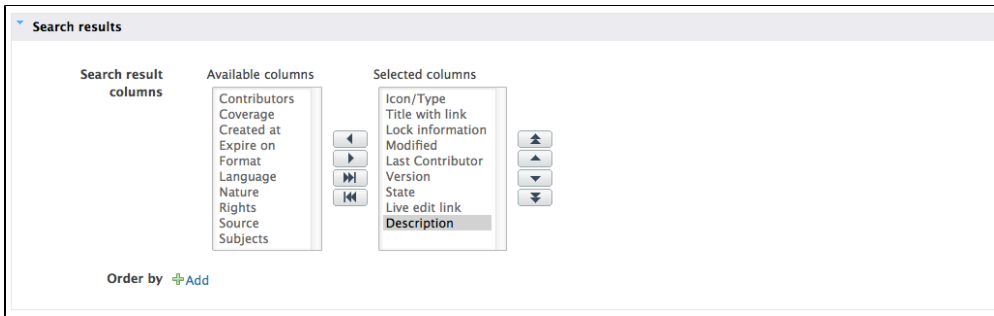
Contributors
Coverage
Created at
Description
Expire on
Format
Language
Nature
Rights
Source

Selected columns

Icon/Type
Title with link
Lock information
Modified
Last Contributor
Version
State
Live edit link


Order by Add

- Select the column you want to add and click on the arrow.
The new field is added in the selected columns.



3. Use the up and down arrows to reorder the columns.

Removing search result columns

To remove a column, select the column to be removed and click on the  arrow.



Changing search result sorting

You can sort the results on any of the search results column. You can also change the order direction.

To change the sort criteria of search results:

1. On the **Search results columns** form, in the **Order by** field, Click on **Add** and the select the column you want to use to sort the search results.
2. In the **Order direction** field, select if you want to order search results in an increasing or decreasing order.

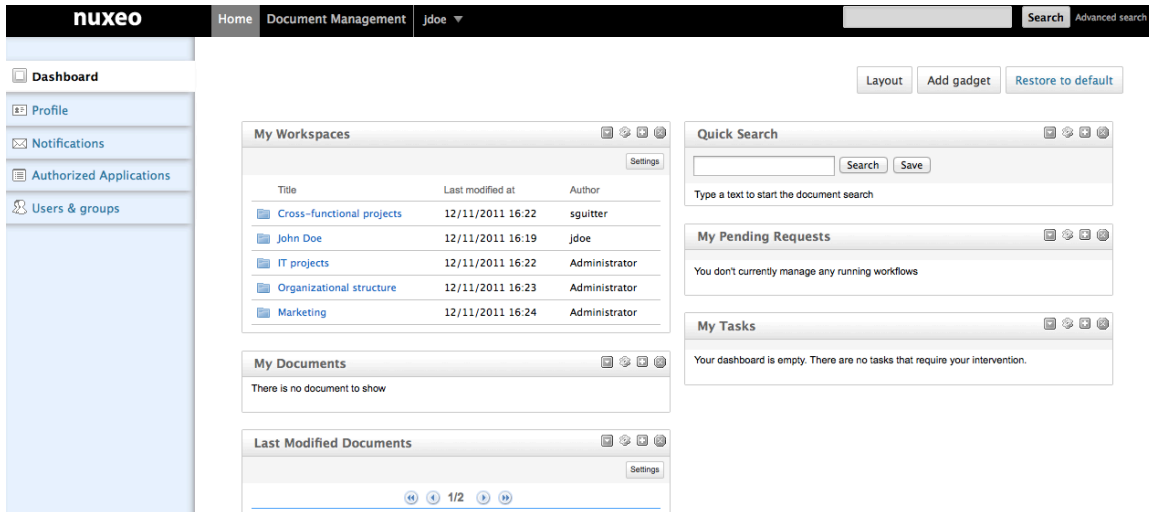
Related pages

-  [Local search configurations](#)
-  [Searching Nuxeo DM](#)

User home

Users have a **Home** tab, that offers user-centric tabs. From this home, the user can access to:

- [his dashboard](#)



- [his profile](#)

The screenshot shows the Nuxeo user profile page for John Doe. The left sidebar contains navigation links: Dashboard, Profile, Notifications, Authorized Applications, and Users & groups. The main content area displays the user's profile information:

- John Doe** (Actions)
- Username: jdoe
- First name: John
- Last name: Doe
- Company: Company
- Email: jdoe@company.com
- Groups for this user: Members group
- Virtual groups for this user: (empty)
- Avatar: (placeholder image)
- Birth date: 3/31/1982
- Phone number: (empty)
- Gender: Male

- a summary of the alerts he's subscribed to,

The screenshot shows the Nuxeo alerts page for user jdoe. The left sidebar is the same as the previous screenshot. The main content area displays a table of alerts:

Notification	Subscribed to	On document	
Creation	user:jdoe	IT projects /default-domain/workspaces/IT project	Unsubscribe
Creation	user:jdoe	Functional documentation /default-domain/workspaces/IT project/Functional documentation	Unsubscribe
Modification	user:jdoe	Functional documentation /default-domain/workspaces/IT project/Functional documentation	Unsubscribe
Creation	user:jdoe	Marketing /default-domain/workspaces/Organizational structure/Marketing	Unsubscribe
Modification	user:jdoe	Marketing /default-domain/workspaces/Organizational structure/Marketing	Unsubscribe
Modification	user:jdoe	Cross-functional projects /default-domain/workspaces/espace dm de solen	Unsubscribe
Creation	user:jdoe	Cross-functional projects /default-domain/workspaces/espace dm de solen	Unsubscribe

- the list of external applications that can access Nuxeo DM's data, using Nuxeo DM gadgets for instance,
- the users and groups directory

The screenshot shows the Nuxeo Users and Groups directory page. The left sidebar is the same as the previous screenshots. The main content area displays the 'Users' tab with a search bar and a table of users:

Search: John [Search] [Clear]

Items/page: 20

User	First name	Last name
jdoe	John	Doe
jsmith	John	Smith

Related pages

- Alerts
- Setting automatic notifications
- Sending an email
- Changing content presentation
- Managing dashboards
- Accessing content

Using Nuxeo gadgets from other applications

It is possible to use Nuxeo DM gadgets in other applications, such as iGoogle.

This takes 2 steps, to make this work:

1. your administrator must [authorize the external application to access Nuxeo DM](#),
2. you can [add the Nuxeo gadget on the external application](#).

In this page, we will take the example of iGoogle, which is a pretty easy example. For more complex use cases, you can report to the page [Using OAuth](#).

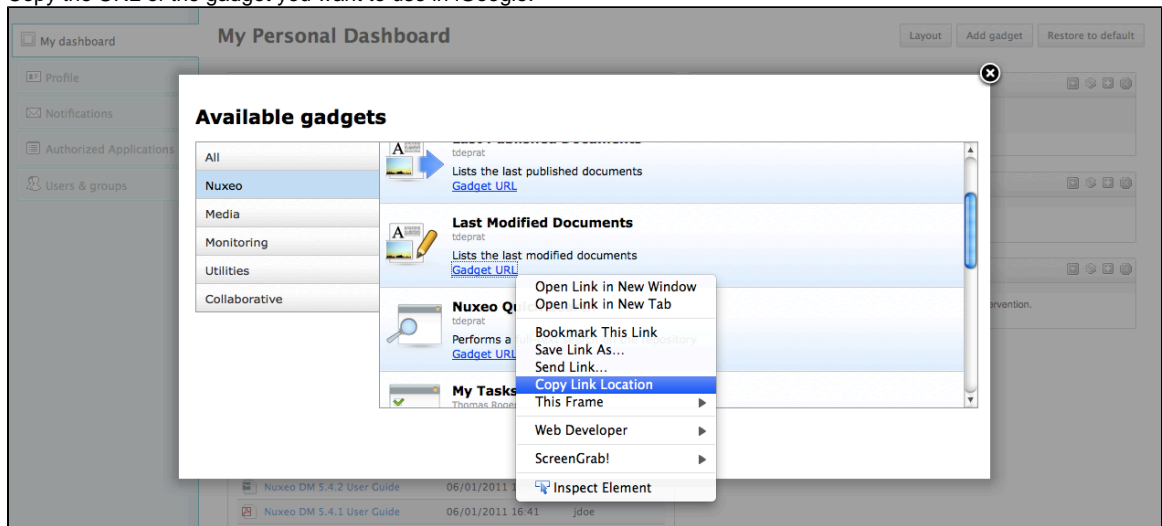
Authorizing an external application to access Nuxeo DM

Before users can use Nuxeo DM gadgets in another application, the administrator must authorize this application to access Nuxeo DM content. The page Manage authentication with other applications does not exist.

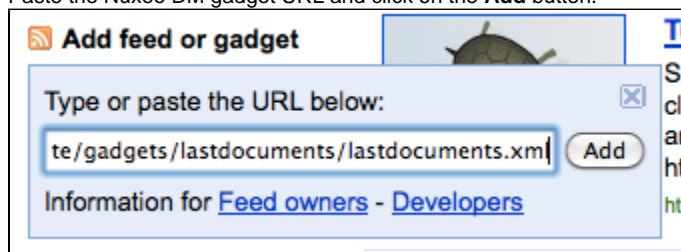
Adding the Nuxeo gadget in the external application

Add a Nuxeo DM gadget in an external application:

1. In Nuxeo DM, go on your dashboard, available in the Home tab.
2. Click on the **Add gadget** button.
3. Copy the URL of the gadget you want to use in iGoogle.



4. In the external application, add a new gadget that has the Nuxeo DM gadget URL. On iGoogle:
 - a. On iGoogle home, click on **Add gadgets**.
 - b. On the gadget selection page, click on **Add feed or gadget**.
 - c. Paste the Nuxeo DM gadget URL and click on the **Add** button.



The Nuxeo DM gadget is now available from your iGoogle page. iGoogle is available in the "Authorized Applications" tab of your home, so you can set how long iGoogle can access Nuxeo DM content.

Working in workspaces

Workspaces are spaces dedicated to collaborative work. It is the place where you will be able to create, share and edit documents.

You can also use collaborative services like forums, websites or blogs to communicate and share information with the other users.

Working with workspaces

There are two types of workspaces:

- *shared workspaces* are workspaces meant for collaborative work, that is to say that the workspace's content is meant to be shared and modified by several users. Collaborative workspaces are workspaces created in the root space called **Workspaces** and shared

between users. Once documents are ready for distribution, they must be published in a section.

- *personal workspaces* can only be accessed by their owner, by default. You can of course share the access to your personal workspace with other users. Personal workspaces are accessible in the header of the application.

✓ Content creation and edition, as well as management, works the same way in personal workspaces as in collaborative workspaces.

By default, no workspace is available at workspaces root. Thus, you can create the structure you need for your project, edit it if needed. You can also [set the appropriate access right](#) for users to be able to collaborate in the workspaces.

Workspaces management also includes setting [alerts](#) for users to be informed when content is created or edited in workspaces and handling content deletion.

Creating a workspace

Workspaces are created in the Workspaces rootspace, either at the root of Workspaces or in subworkspaces. By default, no workspace is available in Nuxeo DM so that you can create the structure needed for your project. You can create as many workspaces and subworkspaces as you need.

Workspaces can be created from scratch or from a template.

Creating a workspace from scratch

To create a new workspace, you need to have at least 'Write' rights in the parent folder.

To create a workspace:

1. Click on the **New Document** button (**New Workspace** if you are the root of workspaces).
2. On the Available document types window, click on **Workspace**.
3. Give the workspace a title and possibly a description.
4. Click on **Create** button.

The workspace's **Content** tab is displayed.



Creating a workspace from a template

Templates are predefined workspaces that you can use to make building your workspace structure easier.

When you create a workspace from a template, the newly created workspace automatically have the same content and description as its template. Access rights however are not inherited from the template but from the parent workspace.

To create a workspace from a template:

1. Click on the **New Document** button (**New Workspace** if you are the root of workspaces).
2. On the Available document types window, click on **Workspace**.
3. Give the workspace a title, possibly a description and select the template to create the workspace from in the drop down list.
4. Click on **Create** button.

The workspace's **Content** tab is displayed.

Related pages

- [Creating a workspace](#)
- [Editing a workspace](#)
- [Deleting a workspace](#)
- [Managing a workspace](#)
- [Document Management concepts](#)

Want to customize workspaces?

No content found for label(s) override-default workspace.

Editing a workspace

To edit a workspace, you need to have Manage right on the workspace.

When you edit a workspace, you can edit its properties (title and description) and its metadata. The metadata of workspaces are the same as for all the other documents:

Field	Description
Nature	Nature of the document.
Subjects	Topic(s) of the document.
Rights	Information about the reproduction rights of the document. Rights informations often encompass Intellectual Property Rights and Copyright.
Source	The references of the resource from which the document's content is derived (totally or partially).
Coverage	Information about the geographic reach of the document.
Created at	Date automatically filled in by the system when the document is created.
Last modified at	Date automatically filled in by the system when the document is modified.
Format	Format of the document, if any is preferred.
Language	Language used in the document.
Expire on	Date on which the document stops being valid. Click on the calendar icon to select a date. This date is not indexed in the system. It is just in indication for users but it is not processed by the application.
Author	User who created the document. This field is automatically filled in by the system.
Contributors	Users who modified the document. This field is automatically filled in by the system.
Last contributor	Last user who modified the document. This field is automatically filled in by the system.

To edit a workspace:

1. Click on the **Edit** tab of the workspace.
2. Fill in the edition form's fields.

Documentation

Content Edit Alerts History Manage

Title * Documentation

Description

Nature Select a value

Subjects

Select a value

Art
Daily life
Human science

Select a value

Add

Rights

Source

Coverage

Select a value

Select a value

Created at 12/22/2011 5:08 PM









Last modified at 12/22/2011 5:08 PM

Format

Language

3. Optionally type a comment to keep track of why you edited the workspace.
4. Click on the **Save** button.
Modifications are saved and the fact that you edited the workspace is tracked in **History** tab.

Related pages;

-  [Creating a workspace](#)
-  [Editing a workspace](#)
-  [Deleting a workspace](#)
-  [Accessing content](#)
-  [Editing content](#)
-  [Managing vocabularies](#)
-  [Managing a workspace](#)
-  [Document Management concepts](#)

Deleting a workspace




Only users with writing or management rights in the parent workspace can delete a workspace.

When you delete a workspace, you also delete its content. This action moves the workspace into the parent's trash, from which users with management rights can [revert deletion](#) or [delete it permanently](#).

To delete a workspace:

1. In the **Content** tab of the parent workspace, check the box corresponding to the workspace to delete.
2. Click on the **Delete** button.
3. In the window that pops up, click on the **OK** button.
The parent workspace's **Content** tab is displayed: the deleted workspace is not displayed anymore.

Related pages

-  [Deleting content](#)
-  [Managing deleted documents](#)
-  [Deleting a workspace](#)

Managing a workspace

Users with management rights can parameter the workspace.

All management actions are available in the **Management** tab of the workspace.
This is the place where you can:

- [set access rights](#) on the workspace to define who can read the content, edit it or delegate management of the workspace
- set [alerts](#) for other users so they get automatically informed of the content evolution
- [manage deleted documents](#) in the workspace **Trash**,
- change the look of the workspace by [choosing a preset theme](#),
- define the sections in which users will be able to publish from the document (called [publication targets](#)).

Managing deleted documents

When they are deleted by users with writing rights, documents are moved into the **Trash** tab of the parent folder (domain, workspace, folder, etc). They are not erased from the application. Users with management rights can still restore them or delete them permanently.

Restoring documents

Only users with management rights can restore documents.

When they are deleted by users with writing rights, documents are moved into the **Trash** tab of workspaces or folders. They are not erased from the application and can still be restored, i.e. moved back into the **Content** tab of the workspace.

To restore a document:

1. Go on the **Trash** tab of the workspace.



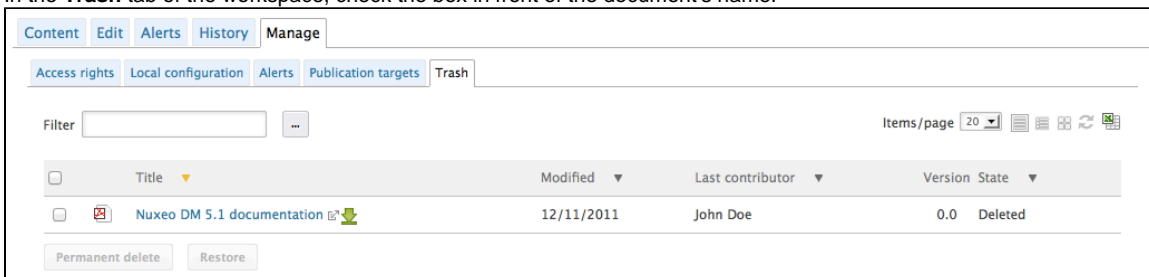
2. Check the box in front of the document's name.
 3. Click on the **Restore** button.
 4. On the window that pops up, click on the **OK** button.
- The document is moved back into the **Content** tab of the workspace.
It takes the 'project' life cycle state, even if its life cycle state before deletion was "approved" or "obsolete".

Permanently deleting documents

Only users with management rights can manage the trash of a space and delete documents permanently.

To delete a document permanently:

1. In the **Trash** tab of the workspace, check the box in front of the document's name.



2. Click on the **Permanent delete** button.
 3. On the window that pops up, click on the **OK** button.
- The document is permanently erased from the application. It cannot be restored.
The [relations](#) from and to the deleted document are updated and are displayed as a URI relation: the deleted document is displayed as an external document, identified by its reference (URI).

Related pages

- [Deleting content](#)
- [Managing deleted documents](#)
- [Deleting a workspace](#)

Setting publication targets

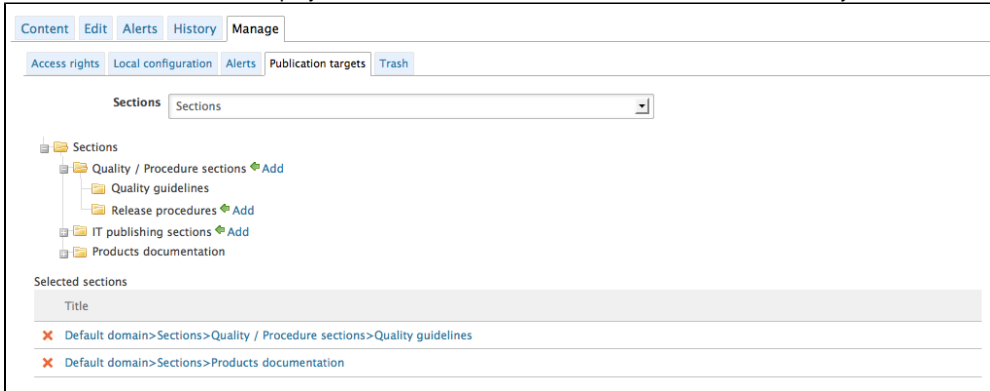
In order to guide users when they publish documents and make sure documents are published in the correct sections, you can define publication

targets for the workspace's documents. Publishing targets are sections in which the documents from the workspace will be publishable. Users will then be able to publish documents only in the sections you have defined.

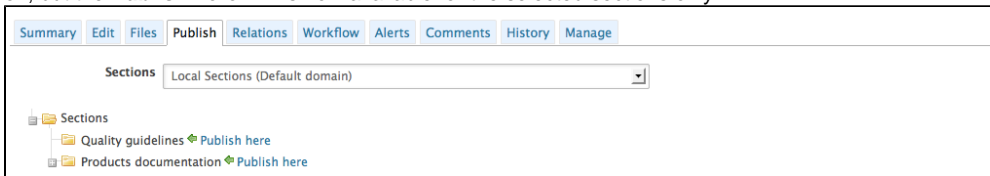
By default, workspaces don't have any targets defined.

To define the publication targets of a workspace:

1. Click on the **Manage** tab of the workspace.
The **Access Rights** tab is displayed by default.
2. Click on the **Publication targets** tab.
If no section has been defined yet, users can submit documents to publishing in any section (providing they have the rights to publish).
3. Unfold the sections tree and click on the **Add** link of the sections to which you want to restrict publishing from this workspace.
The selected sections are displayed in a table below the tree. No **Add** link is available anymore for these sections.





When they click on the **Publish** tab of documents to publish a document, users are still displayed all the sections they have "Read" right on, but the **Publish here** link is now available for the selected sections only.



4. Click on the icon to remove a section from the workspace's targets.


Related pages

-  [Publishing documents](#)
-  [Setting publication targets](#)

Applying a preset look to a space

Local administrators, ie users with Manage right in the space, can easily apply a preset theme to a workspace, template or section. You can apply a theme to spaces only. For instance, you can change the theme of sections, so that they look different from workspaces, but you cannot change the look of a document.

Two themes, also called flavors, are available by default: the Nuxeo theme and the Rainbow theme. Flavors are sets of colors that determine the look of the space. If you configured other flavors in Nuxeo Studio, they are available here as well.

 The new space's theme is not applied to the sub-spaces, but it is applied to the documents it contains.

When you choose to apply a theme to a workspace, for instance, you can refine what is displayed on the page by applying a perspective on the theme. A perspective is a fragment visualization mask that determines that some parts of the page, like the clipboard and worklist, are not displayed to the user if specified conditions are met. The default application has only one perspective.

To change the theme of a workspace:

1. Click on **Manage** tab of the space.
2. Click on the **Local configuration** tab and, if needed, click on the **Enable** link of the "Theme Configuration" section.

3. Select the flavour you want to apply.
 4. Click on the **Save** button.
- The page is displayed with the selected look.

Related topics in other spaces

- [Branding](#) (Nuxeo Online Services)
- [Specific Upgrade Instructions](#) (Nuxeo Online Services)

Changing the presentation of document lists

From the "Local configuration" sub-tab of the "Manage" tab, you can set preferences on what content can be created in the current space, how the lists of content should be presented, customized search features...

Nuxeo DM uses different presentations for the lists of documents: they can have different layouts, display specific informations on the documents, have a different default number of documents on a page, enable some features on the documents, etc. These predefined presentations of lists of documents are called "Content views".

Here are some examples of content views used in Nuxeo DM:

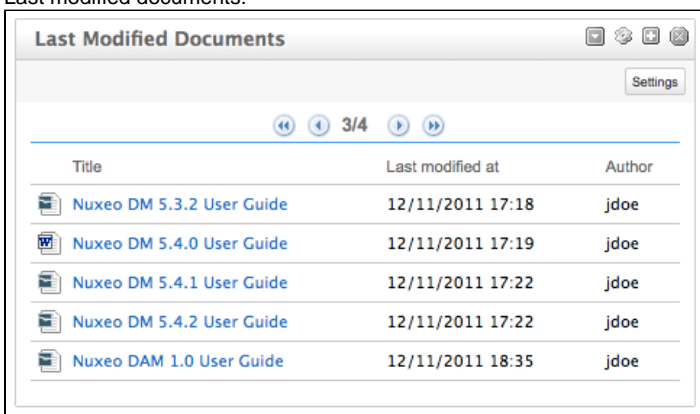
- Document content (used for workspaces and sections for instance):






	Title	Modified	Last contributor	Version	State
<input type="checkbox"/>	Nuxeo DAM 1.0 User Guide	12/11/2011	John Doe	0.0	Project
<input type="checkbox"/>	Nuxeo DAM 1.1 User Guide	12/11/2011	John Doe	0.0	Project
<input type="checkbox"/>	Nuxeo DM 5.3.2 User Guide	12/11/2011	John Doe	0.0	Project
<input type="checkbox"/>	Nuxeo DM 5.4.0 User Guide	12/11/2011	John Doe	0.0	Project
<input type="checkbox"/>	Nuxeo DM 5.4.1 User Guide	12/11/2011	John Doe	0.0	Project
<input type="checkbox"/>	Nuxeo DM 5.4.2 User Guide	12/11/2011	John Doe	0.0	Project
<input type="checkbox"/>	Nuxeo Platform 5.5 User Guide	12/11/2011	John Doe	0.0	Project

- trash content view:

	Title	Modified	Last contributor	Version	State
<input type="checkbox"/>	Nuxeo DM 5.1 documentation	12/11/2011	John Doe	0.0	Deleted

- Last modified documents:



Title	Last modified at	Author
 Nuxeo DM 5.3.2 User Guide	12/11/2011 17:18	jdoe
 Nuxeo DM 5.4.0 User Guide	12/11/2011 17:19	jdoe
 Nuxeo DM 5.4.1 User Guide	12/11/2011 17:22	jdoe
 Nuxeo DM 5.4.2 User Guide	12/11/2011 17:22	jdoe
 Nuxeo DAM 1.0 User Guide	12/11/2011 18:35	jdoe

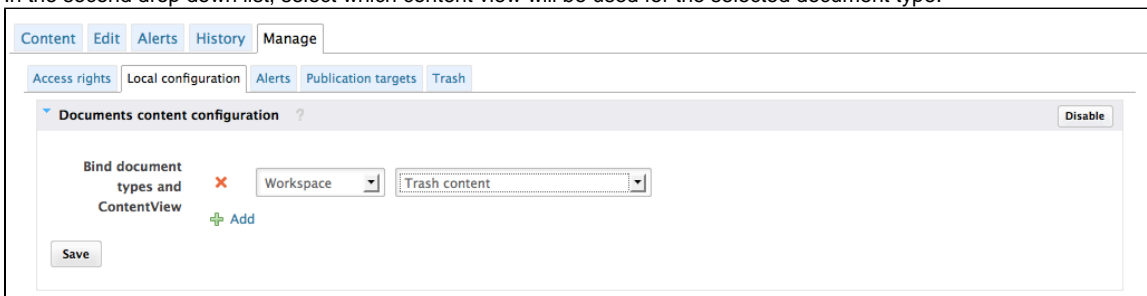
You can define what content view will be used for folderish documents (ie documents in which you can create other documents) in the current space. This is inherited in the folderish documents of the space from which you define these preferences.



You can leverage this feature when you customize Nuxeo DM and create new content views. Your content view will then be available in the drop down list and you can use locally for documents. You can read [How to define a new view using Nuxeo Studio](#).

To associate a document type and a content view:


1. Click on the **Manage** tab of the current space.
2. Click on the **Local configuration** sub-tab.
3. If needed, click on the **Enable** link of the "Documents content configuration".
The document content configuration form is displayed.
4. Click on the **Add** link to define a new document type - content view association.
5. In the first drop down list, select the document type.
6. In the second drop down list, select which content view will be used for the selected document type.



The screenshot shows the 'Documents content configuration' form. It has tabs for 'Content', 'Edit', 'Alerts', 'History', and 'Manage'. Under the 'Manage' tab, there are sub-tabs for 'Access rights', 'Local configuration', 'Alerts', 'Publication targets', and 'Trash'. The 'Local configuration' sub-tab is active. The 'Documents content configuration' section is expanded, showing a 'Bind document types and Content View' section. It has a dropdown menu set to 'Workspace' and a button to 'Add'. There is also a 'Save' button at the bottom.

7. Click on the **Save** button.
The selected document type now has the presentation defined by the selected content view, in the current space and its sub-spaces.

To remove a document type - Content view association

1. Click on the **Manage** tab of the current space.
2. Click on the **Local configuration** sub-tab.
The available local configurations are displayed.
3. In the Document content configuration, click on the icon  the document type - content view association you want to remove.
4. Click on the **Save** button.
The document type has its default content view.

Related topics in other spaces

No content found for label(s) content-views.

Defining the authorized document types

The local configuration enables users to define set some document types preferences at the workspace or section level, from Nuxeo DM's interface. These preferences are inherited in the sub-spaces and all folderish documents (folders, ordered folders, websites, etc).


On this page

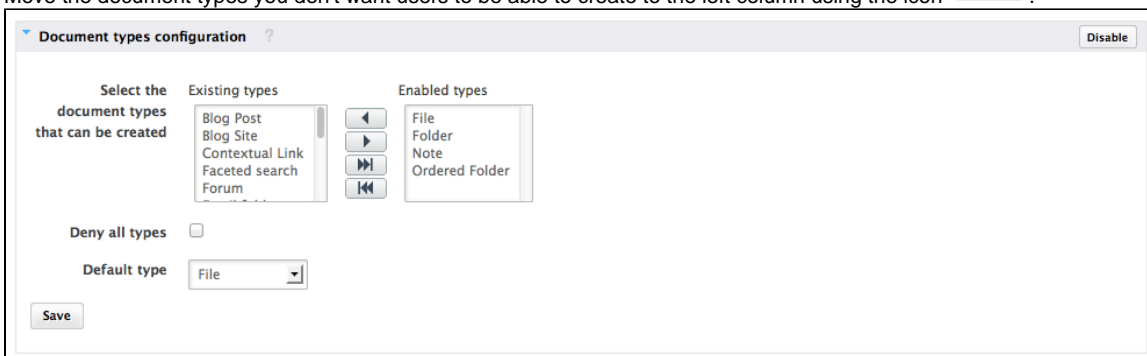
- Defining what document types can be created
- Denying the possibility to create documents
- Selecting the default document type
 - Related content in other spaces

Defining what document types can be created

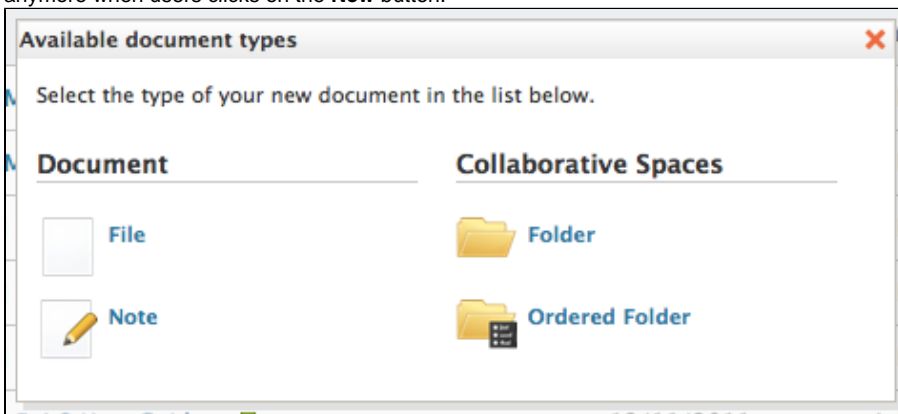
Users with Manage right in a space can define what document types can be created in the current space by restricting the list of allowed document types proposed by default.

To define what document types can be created in a space:

1. On the current space, click on the **Manage** tab.
2. Click on the **Local configuration** sub-tab.
The list of the available local configurations are displayed.
3. If needed, click on the **Enable** link of the "Document types configuration".
The document types configuration form is displayed. By default, all types are allowed.
4. Move the document types you don't want users to be able to create to the left column using the icon .



5. Click on the **Save** button.
The document types you removed from the default selection cannot be created in the current space anymore: they are not displayed anymore when users clicks on the **New** button.



Denying the possibility to create documents

It is possible to deny the possibility to create documents without changing the access rights applied to the space. This allows to prevent the creation of new documents without forbidding the edition of existing documents.

To prevent new document creation:

1. On the current space, click on the **Manage** tab.
2. Click on the **Local configuration** sub-tab.
The list of the available local configurations are displayed.
3. If needed, click on the **Enable** link of the "Document types configuration".
The document types configuration form is displayed. By default, all types are allowed.
4. Check the box **Deny all types**.
5. Click on the **Save** button.
The **New** and **Import a file** buttons are not displayed on the **Content** tab anymore.

Content

Edit


Alerts

History

Manage

Filter

Items/page 20

<input type="checkbox"/>	Title	Modified	Last contributor	Version	State
<input type="checkbox"/>	 Nuxeo DAM 1.0 User Guide 	12/11/2011	John Doe	0.0	Project
<input type="checkbox"/>	 Nuxeo DAM 1.1 User Guide 	12/11/2011	John Doe	0.0	Project
<input type="checkbox"/>	 Nuxeo DM 5.3.2 User Guide 	12/11/2011	John Doe	0.0	Project
<input type="checkbox"/>	 Nuxeo DM 5.4.0 User Guide 	12/11/2011	John Doe	0.0	Project
<input type="checkbox"/>	 Nuxeo DM 5.4.1 User Guide 	12/11/2011	John Doe	0.0	Project
<input type="checkbox"/>	 Nuxeo DM 5.4.2 User Guide 	12/11/2011	John Doe	0.0	Project
<input type="checkbox"/>	 Nuxeo Platform 5.5 User Guide 	12/11/2011	John Doe	0.0	Project

Paste

Add to worklist

Copy

Delete

Selecting the default document type

Workspace managers can set the document type that is created when users import documents using the **import a file** button or drag & drop. In a workspace, the default document type is file.

To define the default document type for import:

1. On the current space, click on the **Manage** tab.
2. Click on the **Local configuration** sub-tab.
The list of the available local configurations are displayed.
3. If needed, click on the **Enable** link of the "Document types configuration".
The document types configuration form is displayed. By default, all types are allowed.
4. Select the default document type in the drop down list.
5. Click on the **Save** button.



Add your own document types

You can leverage this feature when you customize Nuxeo DM and create new document types that extend the File document type. Your document type will then be available in the "Default type" drop down list and you can select it instead of the default File. You can read a [tutorial showing how to create a new document type using Nuxeo Online Services](#).

Related content in other spaces



[Documents](#) (Nuxeo Online Services)

Local search configurations

If customized faceted search and advanced search forms have been contributed, it is possible to define what [faceted search](#) or [advanced search](#) to display from a space. This enables users to have search forms adapted to the documents and processes used in the space.

- [Changing faceted search](#)
- [Changing advanced search form](#)
 - [Related pages](#)
 - [Want to know more about search configuration?](#)

Changing faceted search

It is possible to enable several faceted searches on a space. This allows users to have several forms and possibly predefined searches that they can edit.

To enable contributed faceted searches:

1. Click on the **Manage** tab of the space.
2. Click on the **Local configuration** sub-tab.
3. If needed, click on the **Enable** link of the faceted search configuration.
The default faceted search provided in Nuxeo DM and the list of contributed faceted searches is displayed.
4. Move the faceted searches you want to enable from the space to the "Enabled content view" list.

- Click on the **Save** button.
Users that have access to the space now have the selected faceted searches available in the Faceted search tab of the left pane.

✓ To remove a faceted search, move it back to the "Existing content view" list on the left and click **Save**.

Changing advanced search form

You can have only one advanced search form enabled.

To enable a contributed advanced search form:

- Click on the **Manage** tab of the space.
- Click on the **Local configuration** sub-tab.
- If needed, click on the **Enable** link of the search configuration.
The default advanced search form provided in Nuxeo DM is selected in the "Advanced search view" drop down list.
- In the "Advanced search view" drop down list, select the advanced search form that you want to enable.

- Click on the **Save** button.
When users click on the **Advanced search** link from the current space and one of its sub-space, the selected advanced search form is displayed.

Related pages

- [Local search configurations](#)
- [Searching Nuxeo DM](#)

Want to know more about search configuration?

No content found for label(s) advanced-search.

Working with documents

The Document Management module enables you to create, edit and share documents within the application.

Documents are sorted in two categories:

- collaborative services
- documents

Collaborative services are folderish documents that enable users to share information:

- [Workspaces](#)
- [Folders](#)
- [Picture book](#)
- [Mail folder](#)
- [Forum](#)
- [Websites and blogs](#)

Documents available in Document Management module are:

- the [note](#): a text typed in a rich editor integrated to the Nuxeo Platform;
- the [file](#): an attached file;
- the [picture](#): a picture file with specific features available;

The evolution of a document, each time contributors edit it, constitutes its life cycle. This life cycle is composed of the following states:

- *project*: the document has been created and it can be modified;
- *approved*: the document has been approved and is considered as valid. Modifying it makes it back to project life cycle state;
- *obsolete*: the document is not accurate anymore and, for instance, has been replaced by a new version;
- *deleted*: the document is moved into the workspace's or folder's trash.

To change the life cycle state of a document, you need to submit it to a [workflow](#).

Creating content

You need to have writing or management rights to create documents.

Documents can be created in workspaces, templates and folders only. There are several ways to create documents in Nuxeo DM. You can:

- create all content types from the "Content" tab of the workspace and filling the appropriate form (see below),
- use drag and drop from your desktop, to [import one or several documents](#),
- create documents directly from MS Office or OpenOffice, using Nuxeo LiveEdit extensions.

On this page

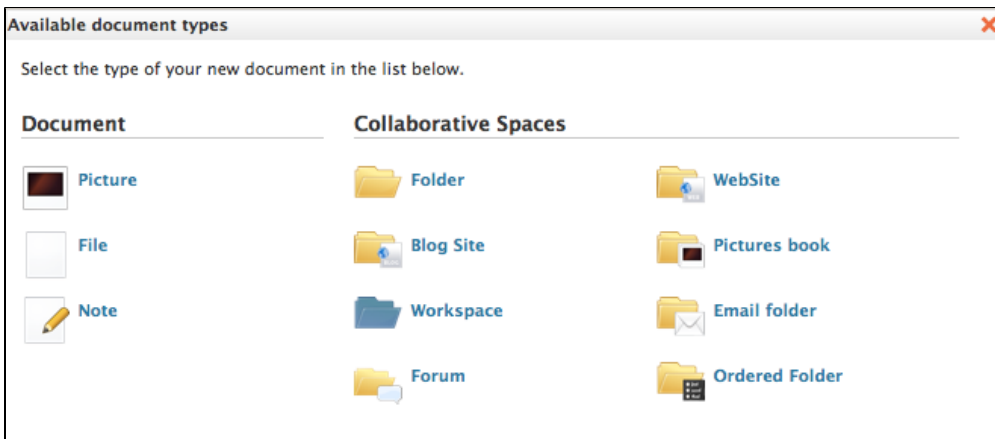
- [Creating a document using the New document button](#)
- [Creating a document using the Import a file button](#)
 - [Related pages](#)

Creating a document using the New document button

Creating a document using the **New document** button enables you to select the type of document you want to create among all Nuxeo DM's document types.

To create a document using the New document button:

1. In the **Content** tab of the workspace, click on the **New Document** button.
2. On the window **Available document types**, click on the desired document.



3. Fill in the document's creation form.
4. Click on the **Create** button.

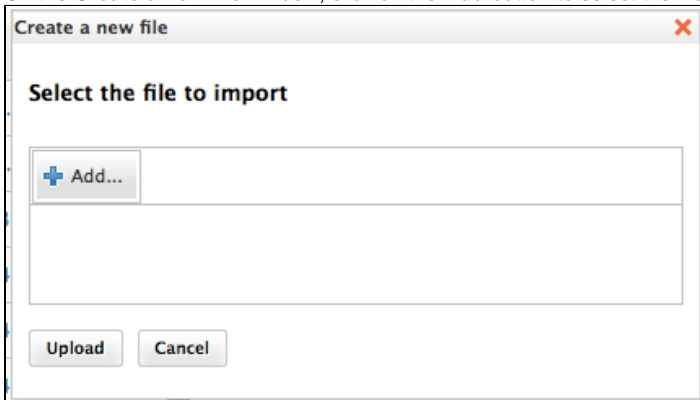
The **Summary** tab of the document is displayed.

Creating a document using the Import a file button

You can use the **Import a file** button to create a document in a faster way. Using this button, you won't need to fill the creation form. Depending on the uploaded file type, the system will create a note, a file or a picture.

To create a document using the Import a file button:

1. In the **Content** tab of the workspace, click on the **Import a file** button.
2. On the **Create a new file** window, click on the **Add** button to select the file to be uploaded.



3. Click on the **Upload** button.
The **Summary** tab of the document is displayed. The document automatically takes the name of the uploaded file as its title. The document has no description. You need to [modify the document](#) to fill in this field.

Related pages

- [Working using drag and drop](#)
- [Working with Live Edit](#)
- [Installing Live Edit](#)
- [Working with WebDAV and WSS](#)
- [Importing content using Drag and Drop](#)
- [Installing Drag and Drop extensions](#)
- [Live Edit compatibility table](#)
- [Manage your own file type with LiveEdit](#)

Editing content

Documents can be edited by users with writing rights in a folder.

Documents can be edited in workspaces only. If you want to modify a published document, you need to edit it in the workspace and republish it.

Document modification means:

- editing or changing the attached file of a [file](#) document,
- editing the text of a [note](#),
- or simply editing the title, description or any metadata of the document.

On this page
<ul style="list-style-type: none"> • Versioning overview • Metadata overview • Editing a document <ul style="list-style-type: none"> • Related pages

Versioning overview

Every time you modify a document, you can define if the changes should be saved in a new version of the document.

Every document holds a version number, which is a piece of information about the evolution of the document. A version number (V.v) is composed of a major version number (V) and a minor version number (v). When a document is created, its version number is 0.0. Minor version increment are used for secondary changes. Major version increment is usually reserved to significant modifications.

Update versions

☒ Skip version increment

☐ Increment minor version

☐ Increment major version

When you edit a document and save your modifications, you have several options regarding the versioning of your document. Let's say that your current document version is 0.1.

- You can save modifications without creating a new version of the document, as it is not yet ready. The 0.1 version of the document has been modified, so its version number becomes 0.1+ (the + indicates to other users that version 0.1 has been modified).
- You can save the modifications in a new version of the document. The version number will then be 0.2 if you increment minor version or 1.0 if you save modifications in a major version. The newly created version is automatically archived in the History tab so it's not lost when users will edit it.

Metadata overview


Metadata are information describing some properties of the workspace, so that they are more accurately referenced. Some metadata are automatically filled in by the system, but most of them need to be filled in by users. When you create a document (file, note, workspace, section, or any other document type), its metadata are empty.

Nuxeo DM uses Dublin Core metadata by default. They are listed below:

Field	Description
Nature	Nature of the document.
Subjects	Topic(s) of the document.
Rights	Information about the reproduction rights of the document. Rights informations often encompass Intellectual Property Rights and Copyright.
Source	The references of the resource from which the document's content is derived (totally or partially).
Coverage	Information about the geographic reach of the document.
Created at	Date automatically filled in by the system when the document is created.
Last modified at	Date automatically filled in by the system when the document is modified.
Format	Format of the document, if any is preferred.
Language	Language used in the document.

Expire on	Date on which the document stops being valid. Click on the calendar icon to select a date. This date is not indexed in the system. It is just in indication for users but it is not processed by the application.
Author	User who created the document. This field is automatically filled in by the system.
Contributors	Users who modified the document. This field is automatically filled in by the system.
Last contributor	Last user who modified the document. This field is automatically filled in by the system.

Although metadata are not mandatory, filling them in will make your documents easier to find using Nuxeo DM search engine or virtual navigation.


 Coverage and subjects are used for [virtual navigation](#).

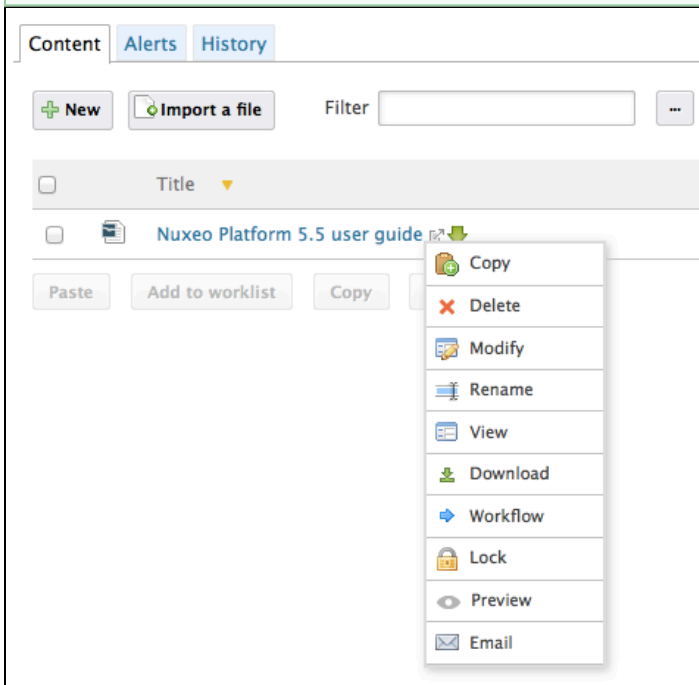
To fill in or change the metadata of the document, just edit the document.

Editing a document

To edit a document:

1. Click on the **Edit** tab of the document.

 You can also access the **Edit** tab directly from the folder's content using right click on the document and clicking on **Modify**.



2. In the modification form displayed, type your modifications.
3. Indicate if you want to update the document's version.

Update versions

☒ Skip version increment

☐ Increment minor version







☐ Increment major version

4. Type a comment if you want to indicate why you modified the document.
This comment is logged in the document's history and helps other users know what has been changed on the document.
5. Click on the **Save** button.
The document's **Summary** tab is displayed.



MS Office and OpenOffice.org documents can be edited directly in their native application using [Live Edit](#) or [WSS/WebDav](#).

Related pages

-  [Editing content](#)
-  [Editing content in a social workspace](#)
-  [Managing vocabularies](#)
-  [Editing a workspace](#)
-  [Accessing content](#)
-  [Working with Live Edit](#)
-  [Document's history](#)
-  [Working with WebDAV and WSS](#)

Deleting content

Only users with "Write" or "manage everything" rights can delete documents from a space.

Deleting a document occurs in two steps:

1. A user moves a document to trash.
2. The manager of the space [deletes the document permanently](#).



The trash tab is displayed to users with management rights.

There are two ways to move a document into the **Trash** tab:

- Deleting it from the workspace content table,
- submitting the document to an [workflow](#), with the destination lifecycle state 'deleted'.

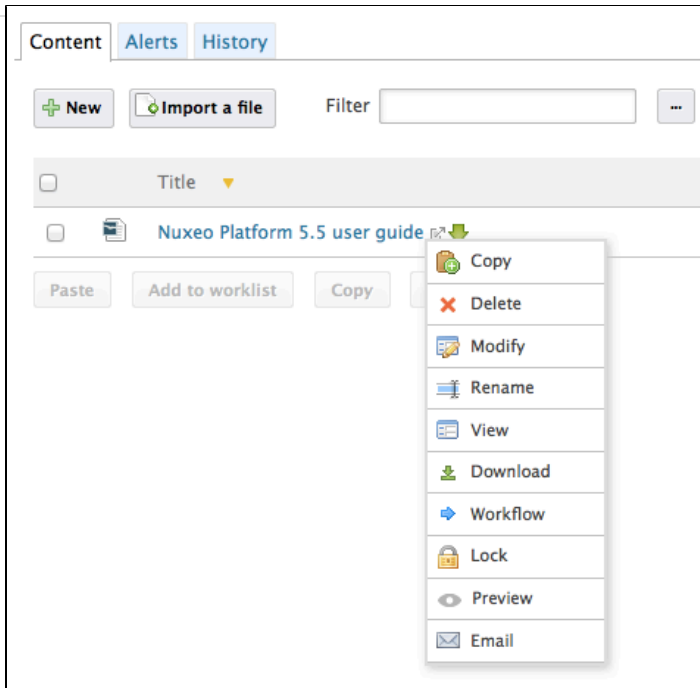
If you are sure that the document is to be deleted, you can delete it from the workspace's content table. However, if you want the deletion to be approved before, you need to submit it to a [workflow](#) and specify that the destination life cycle is 'deleted'. When the workflow is ended and the deletion approved, the document is automatically moved into the **Trash** tab of the document.

To delete a document from the Content tab of the workspace:




1. In the **Content** tab of the workspace, check the box in front of the document's name.
2. Click on the **Delete** button.
3. On the window that pops up, click on the **OK** button.
The document is moved to the **Trash** tab of the workspace (available to users with management rights only) and does not appear in the workspace's content list.



You can also delete documents using right-click on document from the **Content** tab of the workspace.

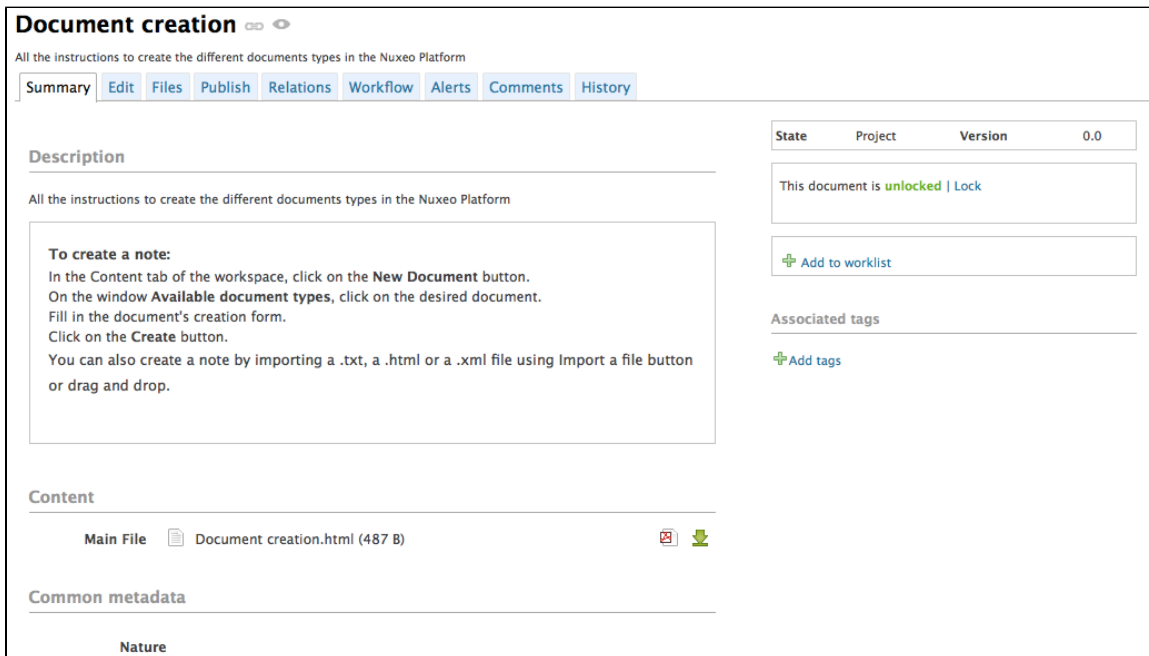


Related pages

-  [Deleting content](#)
-  [Managing deleted documents](#)
-  [Deleting a workspace](#)

Notes

The note is a document that consists in a text displayed in the **Summary** tab of the document. The note is usually created using the integrated rich editor, displayed in the note creation form. This editor enables layout modifications on the text.



The default format of the note is HTML. The other formats available are .txt and .xml. Each format has an associated editor.

Create a new document Note

Title *

Description

Note

To create a note:

1. In the **Content** tab of the workspace, click on the **New Document** button.
2. On the window **Available document types**, click on the desired document.
3. Fill in the document's creation form.
4. Click on the **Create** button.

You can also create a note by importing a .txt, a .html or a .xml file using Import a file button or drag and drop.

Format :

A note is composed of the fields below:












Field	Description
Title	Note's title
Description	Text that explains what the note is about.
Content	Text of the note created using a rich text editor.
Format	Format of the automatically created file used to export notes from the Nuxeo Platform.

To create a note:

1. In the **Content** tab of the workspace, click on the **New Document** button.
2. On the window **Available document types**, click on the desired document.

Available document types

Select the type of your new document in the list below.

Document	Collaborative Spaces	
 Picture	 Folder	 WebSite
 File	 Blog Site	 Pictures book
 Note	 Workspace	 Email folder
	 Forum	 Ordered Folder

3. Fill in the document's creation form.
4. Click on the **Create** button.

✓ You can also create a note by importing a .txt, a .html or a .xml file using **Import a file** button or **drag and drop**.

When the note is created, users can enhance it by adding [annotations](#), [comments](#), attached files on it, or just [editing](#) it.

Related pages

- [Editing a workspace](#)
- [Annotations](#)
- [Comments](#)
- [Accessing content](#)
- [Editing content](#)
- [Document's history](#)
- [Managing vocabularies](#)

Want to customize this document?

- [How to Override Existing Document Types](#) (Nuxeo Platform Developer Documentation — 6.0)

Files

A file document is composed of an attached file that you upload on the application.

✓ You can upload files of any format.

A file is composed of:

- a title (mandatory)
- a description (optional)
- an attached file

Studio Overview – EN

Summary

Edit

Files

Publish

Relations

Workflow

Alerts

Comments

History

Preview

Manage

Content

Main File

Nuxeo Studio Feature Overview.odt (1 MB)

Attachments

Nuxeo Studio Feature Overview.pdf (994 kB)

Common metadata

Nature

Subjects

Rights

Source

State

Project

Version

1.3+

This document is **unlocked** | [Lock](#)

+

Add to worklist

Associated tags

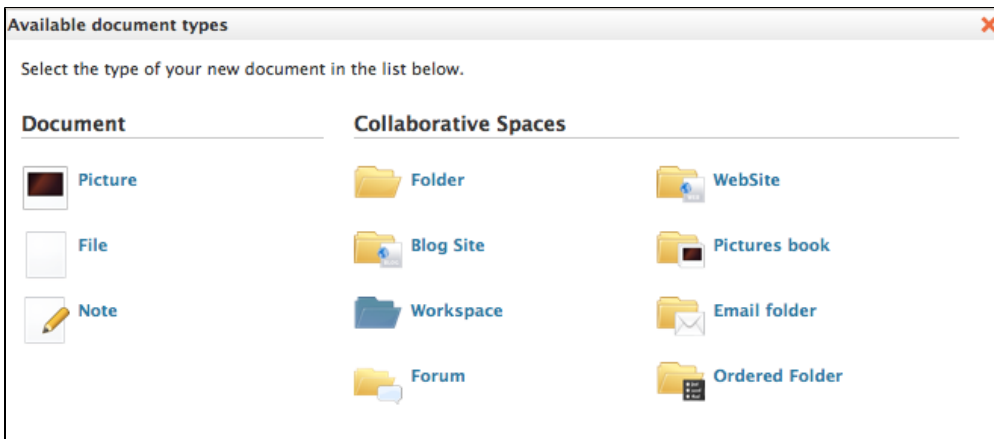
studio

+


Add tags

To create a file:

1. In the **Content** tab of the workspace, click on the **New Document** button.
2. On the window **Available document types**, click on the desired document.










3. Fill in the document's creation form.
4. Click on the **Create** button.




 You can also create a file using the **Import a file** button or using drag and drop.

When the file is created, users can enhance it by filling its metadata, adding attached files on it, [annotating it](#). When the document is completed, you can [publish](#) it in one or several section(s).

Related pages

-  [Editing a workspace](#)
-  [Annotations](#)
-  [Comments](#)
-  [Accessing content](#)
-  [Editing content](#)
-  [Document's history](#)
-  [Managing vocabularies](#)

Want to customize this document?

-  [Files](#) (Nuxeo Platform User Documentation — 6.0)
-  [How to Override Existing Document Types](#) (Nuxeo Platform Developer Documentation — 6.0)
-  [Adding a "Type" Property to File Document Type](#) (Nuxeo Online Services)

Folders

In workspaces, you can create and manage your documents in folders.

A folder works like a workspace, but the documents available for creation are limited. In a folder, you can create:

- notes
- files
- sub-folders.

There are two types of folders:

- regular folders
- ordered folders.

The difference between the two folder types is the way content is sorted.

- In a regular folder, documents are sorted on the title by default. You can change the sort criterion by clicking on the content table columns title. You can thus sort them on their state, author, etc.
- In an ordered folder, you can change the order of documents manually. So, the orders in which documents are listed in the folder doesn't depend on one of its properties (version, author, etc). When a document is created, it is added at the end of the list.

Regular folders

Regulars folders, called "Folders", have the same behavior as workspaces. In a folder, you can:

- create documents and do all the actions available on them (edit, approve, manage relations, etc)

- manage access rights,
- subscribe to and manage alerts,
- manage the folder's trash.

Like in a workspace, you can use drag & drop to create content in a folder.

Ordered folders

Ordered folders are folders in which you can change the content's order.

An ordered folder has the same presentation as a regular folder, but it has some additional buttons below the content table:





- Move up
- Move down
- Move to top
- Move to bottom













To change the content's order:

1. Select a document using the checkbox on the left.
The move buttons are available.

My project

Content
Edit
Alerts
History


Filter

Items/page 20  

<input type="checkbox"/>	Title	Modified	Last contributor	Version	State
<input type="checkbox"/>	 Contract 	12/23/2011	John Doe	0.0	Project
<input type="checkbox"/>	 Functional specifications 	12/23/2011	John Doe	0.0	Project
<input type="checkbox"/>	 Graphic resources 	12/23/2011	John Doe		Project
<input type="checkbox"/>	 Meeting reports 	12/23/2011	John Doe		Project
<input type="checkbox"/>	 Metadata mapping 	12/23/2011	John Doe	0.0	Project
<input checked="" type="checkbox"/>	 Project team 	12/23/2011	John Doe	0.0	Project





Paste
Add to wishlist
Copy
Delete













Move to bottom
Move down
Move to top
Move up

2. Click on the move button you need.
3. The document is moved in the list of documents available in the folder.

My project

Content
Edit
Alerts
History


Filter

Items/page 20  

<input type="checkbox"/>	Title	Modified	Last contributor	Version	State
<input checked="" type="checkbox"/>	 Project team 	12/23/2011	John Doe	0.0	Project
<input type="checkbox"/>	 Contract 	12/23/2011	John Doe	0.0	Project
<input type="checkbox"/>	 Functional specifications 	12/23/2011	John Doe	0.0	Project
<input type="checkbox"/>	 Graphic resources 	12/23/2011	John Doe		Project
<input type="checkbox"/>	 Meeting reports 	12/23/2011	John Doe		Project
<input type="checkbox"/>	 Metadata mapping 	12/23/2011	John Doe	0.0	Project

Paste
Add to wishlist
Copy
Delete

Move to bottom
Move down
Move to top
Move up



You can move one document at a time. If you select more than one document, the move buttons will deactivate.

Want to customize this document type?

No content found for label(s) override-default.

Working using drag and drop

The Nuxeo Platform allows the [import of documents from your desktop using drag and drop](#).

Depending on your browser, you may need to install an extension to enable drag and drop import. Drag and drop is based on the HTML 5 standard and is available without extension, on all browsers that support the HTML 5 Drag and drop. For Internet Explorer, which doesn't support HTML5, you need to install the Drag and Drop extension [from the download dedicated page on nuxeo.com](#).



On the browser versions that support HTML 5, if you previously installed the D&D extension, it is automatically disabled so that HTML 5 drag and drop is used.

Installing Drag and Drop extensions

Drag and Drop extensions are available for the two officially supported browsers: Firefox and Internet Explorer.

Installing Firefox extension

The Nuxeo D&D extension for Firefox is available from the [plugins download page](#).

It comes as a standard Firefox add-on. Installing process is the same as the other available Firefox add-ons: click on the link on the [download page](#) and follow the instructions.

Installing Internet Explorer extension

To make drag and drop available on Internet Explorer, you need to install the Internet Explorer extension available from [plugins download page](#).

The extension is available in 2 formats:

- .exe: includes the drag and drop package and the needed dependencies
- .msi: includes only the drag and drop package

To install the Internet Explorer extension, follow the instructions of the installer.

Importing content using Drag and Drop

You can use Drag and Drop to easily import content into Nuxeo or just to create one document at a time. Two types of import are available:

- [quick import](#), that enables to quickly create documents in workspace;
- [import with metadata](#), that enables to fill in metadata of the document(s) before they are created in the workspace.

Quick import of documents

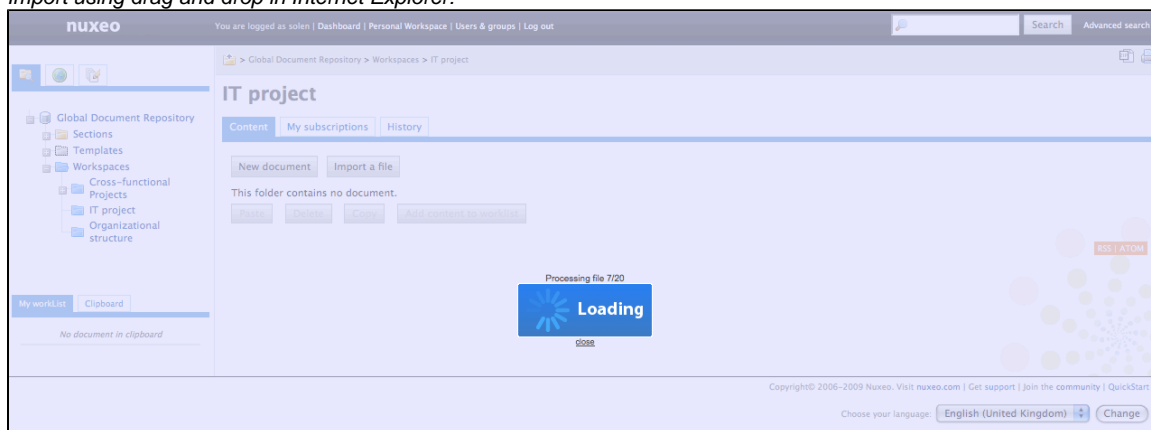
To import content into Nuxeo, drag an item from your computer and drop it into a workspace. The document is then automatically created in the workspace and its title is the name of the original file, and no metadata is filled in.

You can drag and drop on or more files in Nuxeo.

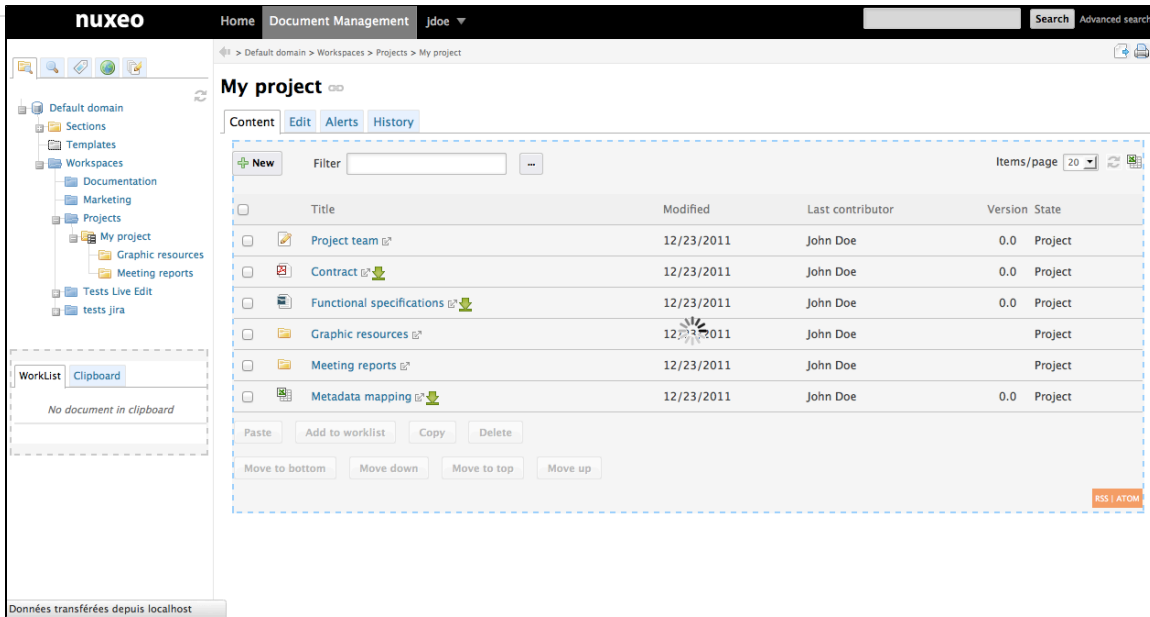


If you use the drag and drop extension, you can drag and drop folders in workspaces. The complete structure of the dropped folder is then reproduced and created in Nuxeo.

Import using drag and drop in Internet Explorer:



Import using drag and drop in Firefox:



You can drop any file type in Nuxeo. Here are some examples of most commonly used item types and their output in Nuxeo:

Item type	Document created in Nuxeo
Folder	Folder
Microsoft Office file	File
OpenOffice.file	File
.txt file	Note
Picture (.jpg, .png, etc)	Picture

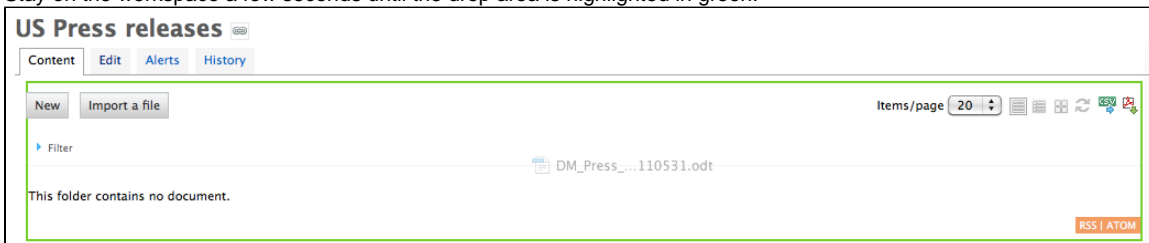
Import with metadata

i Import with metadata is available only on browsers that support the HTML 5 drag and drop standard.

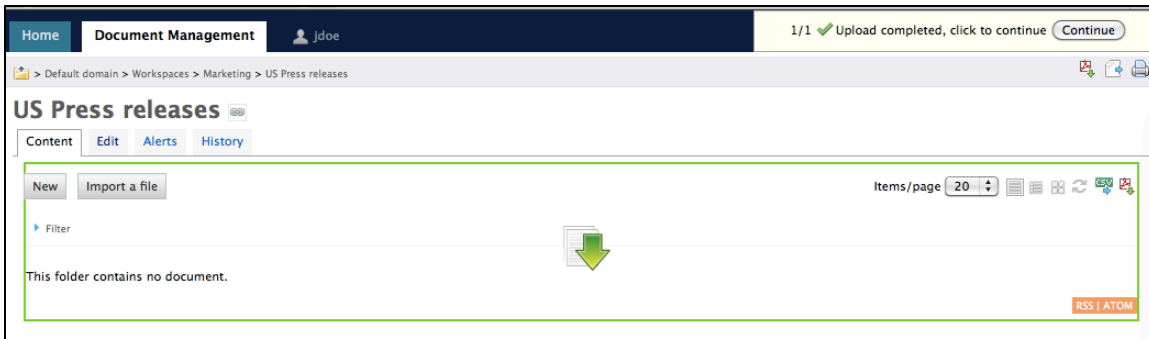
It is possible to do a drag and drop import of documents with an additional step to fill in some metadata. This prevents users from editing the documents after the import is done.

To import documents with metadata:

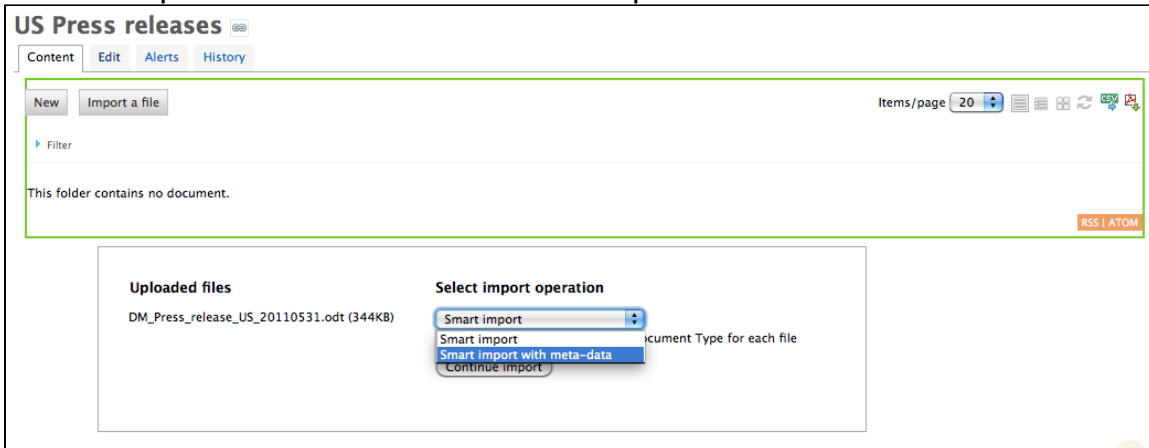
1. Drag your file from your desktop to the workspace main area in the browser, but don't drop it. The drop area is highlighted in blue.
2. Stay on the workspace a few seconds until the drop area is highlighted in green.



3. Drop the file. The file is uploaded. When the upload is done, a "Continue" button is displayed in the top right corner of the page and an icon is displayed in the center of the page.

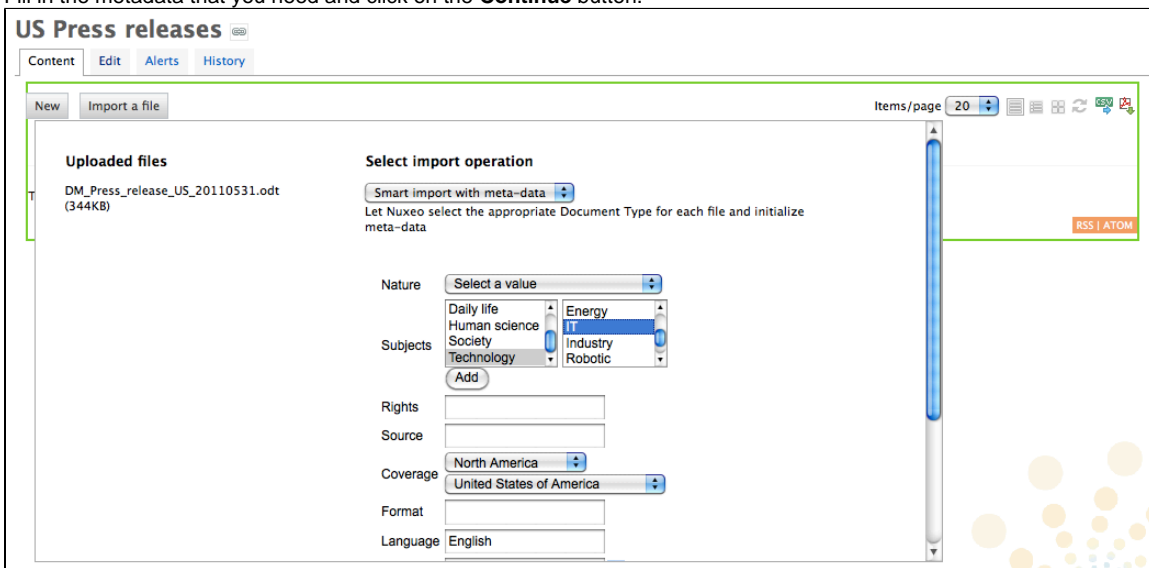


4. Click on the icon or the "Continue" button.
A window pops up, that enables you to select if you want to do a quick import (smart import) or an import with metadata.
5. Select **Smart import with metadata** and click on the **Continue import** button.



The metadata are displayed on the pop up window.

6. Fill in the metadata that you need and click on the **Continue** button.



The file is created with the filled in metadata.

DM_Press_release_US_20110531.odt

Summary Edit Files Publish Relations Workflow Alerts Comments History Preview

Main File
DM_Press_release_US_20110531.odt (352 kB)

State

Project

Version

0.0

This document is **unlocked** | Lock

Add to worklist

Associated tags

Add tags

Common metadata

Nature
Subjects
Rights
Source

Coverage
Created at
Last modified at
Format
Language
Expire on
Author
Contributors
Last contributor

North America/United States of America
5/31/11 5:22 PM
5/31/11 5:22 PM
English
John Doe
John Doe
John Doe

Related pages

- Working using drag and drop
- Importing content using Drag and Drop
- Installing Drag and Drop extensions

Desktop & Office Suites Integration

To ease office documents integration, Nuxeo DM proposes two ways to create and edit document from their native application.

- Nuxeo Live Edit** enables you to create and edit office documents in their native application from Nuxeo DM. Nuxeo Live Edit is available as an extension to be installed on the user's computer. It is available from Microsoft Office and OpenOffice.org.
- Nuxeo WSS** enables you to work on Nuxeo's documents from your desktop directly. Nuxeo WSS is available for Microsoft Office only and doesn't require any installation on the user's computer.

 Extensions are available from [the Fast Track version documentation](#).

Working with Live Edit


Nuxeo Live Edit is a Nuxeo DM extension that enables users to open and edit Microsoft Office and OpenOffice.org documents in their native application from Nuxeo. This extension prevents you from the painful process of downloading - editing - uploading office documents in the application.

Live Edit comes as an extension that needs to be installed on the user's computer. It can be downloaded from [the download dedicated page on nuxeo.com](#).

Live Edit is available for:

- MS Office,
- OpenOffice.org.

Nuxeo Live Edit targets Microsoft Office 2007/2010, OpenOffice.org 3.3 and LibreOffice 3.4.4. It is known to work with Internet Explorer 7+ and Firefox 3.6+.

 Live Edit can be used on Windows and Linux environments.

Live Edit allows you to:

- create documents in MS Office and OpenOffice.org,
- edit documents in MS Office and OpenOffice.org.

On this page

- Before you start
- Creating office documents
- Editing documents
 - More in this guide
 - In other documentation

Before you start

Before you start using Live Edit to create and edit documents:

- you may want to take a look at the [Live Edit compatibility table](#),
- please check your certificate is validated if your Nuxeo DM uses HTTPS. If your certificate is not validated, Live Edit won't work.
- under Linux, ensure to have Java support installed when using LibreOffice. Ubuntu package is *libreoffice-java-common*
- for Internet Explorer 9 users, change your browser mode to at least "IE9 Compat view", in the developer toolbar (F12).

Creating office documents

To create office documents directly into Nuxeo DM:

1. Click on one of the MS Office or OpenOffice.org icon displayed below the search box.
2. The application corresponding to the icon you clicked on opens.
3. Type the content of your document.
4. Save your modifications in Nuxeo DM:
 - By closing the application.
 - By clicking **Save in Nuxeo** in the Add-Ins menu of the application.
A **Save in Nuxeo** window opens.
5. Give the document a title and a description, and select where to save the document in Nuxeo DM.
6. Click on **OK** button.
The document is automatically saved in Nuxeo DM.

Editing documents





Documents that can be edited with Live Edit are indicated by the icon in the **Content** tab of the parent folder and in the **Summary** tab of the document.

When you edit a document online using Live Edit, the document is automatically locked in Nuxeo DM. It is automatically unlocked when you close the file from Microsoft Office or OpenOffice.org.





To edit office documents from Nuxeo DM:

1. Click on the online edition icon of the document.
The document opens in the appropriate application.
2. Modify the file.
3. When done, close the editing application.
A window pops up.
4. Indicate if you want to save the modifications.
The modified file is automatically uploaded on the Nuxeo DM application.

More in this guide

-  [Working with Live Edit](#)
-  [Installing Live Edit](#)
-  [Live Edit compatibility table](#)
-  [Manage your own file type with LiveEdit](#)

In other documentation

-  [LiveEdit makes MS Office slow to start](#) (Nuxeo Technical Knowledge Base (FAQ))
-  [Setup Firefox protocol handler with LiveEdit 2 for MS Office and OpenOffice.org](#) (Nuxeo Technical Knowledge Base (FAQ))
-  [LiveEdit icons are still available in Nuxeo after LiveEdit has been uninstalled](#) (Nuxeo Technical Knowledge Base (FAQ))
-  [I can't view my websites and blogs \(displays a message "The HTTP header field "Accept" with value..."](#) (Nuxeo Technical Knowledge Base (FAQ))

Installing Live Edit

Live Edit works with Microsoft Office and OpenOffice.org. It is available for Internet Explorer and Firefox browsers. The table below summarizes the extensions and packages you need to install for each OS and browser.

The Microsoft Office extension is available in 32- and 64-bit. You need to install the version corresponding to Microsoft Office, not the operating system (if you run MS Office 32-bit on Windows 7 64-bit, you need to install Live Edit for MS Office 32-bit).

	Internet Explorer	Firefox
--	-------------------	---------

Microsoft Office 32-bit	Live Edit MS Office-IE 32-bit (.msi)	Live Edit MS Office-IE 32-bit (.msi) Firefox Protocol Handler for FF <3.6 or Firefox Protocol Handler for FF 4+
Microsoft Office 64-bit	Live Edit MS Office-IE 64-bit (.msi)	Live Edit MS Office-IE 64-bit (.msi) Firefox Protocol Handler for FF <3.6 or Firefox Protocol Handler for FF 4+
OpenOffice.org / LibreOffice	Live Edit MS Office-IE 32-bit (.msi) Live Edit OOo Distribution (.exe)	Live Edit OpenOffice.org extension (.oxt) Firefox Protocol Handler for FF <3.6 or Firefox Protocol Handler for FF 4+

All Live Edit extension versions are available from: <http://download.nuxeo.org/desktop-integration/live-edit/>.



Live Edit MS Office requirements

The Live Edit MS Office installers require .Net and the installation of the Microsoft Office Primary Interop Assemblies (PIA) that corresponds to the version of Microsoft Office. These are already installed on a complete default installation of MS Office, so you probably don't need to install them.

- PIA for MS Office 2010: <http://www.microsoft.com/download/en/details.aspx?id=3508>
- PIA for MS Office 2007: <http://www.microsoft.com/download/en/details.aspx?id=18346>

For Internet Explorer 9 users

If you are on a 64-bits Windows you have two versions of Internet Explorer 9 (32-bits and 64-bits of course), if you have Office 32-bits and use Internet Explorer 64-bits, you'll need to apply this registry fix to enable Live Edit in Internet Explorer 9 64-bits: [livedit-ie-x64-fix.reg](#)

For Windows XP / MS Office 2003 32 bits users

You need to install the previous version of Live Edit (2.3.0) available from: <http://download.nuxeo.org/desktop-integration/live-edit/nuxeo-livedit-msoffice-ie-2.3.0.msi>.

You also need to install the *Microsoft Visual Studio 2005 Tools for Office Runtime* available from: <http://www.microsoft.com/download/en/details.aspx?displaylang=en&id=24263>.

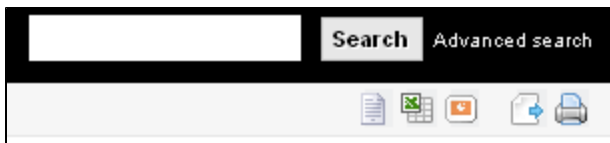
On this page

- For MS Office and Internet Explorer users
- For MS Office and Firefox users
 - Installing Live Edit for MS Office
 - Installing Firefox Protocol Handler
 - Configuring the Firefox protocol handler
- For OpenOffice.org and Internet Explorer users
- For OpenOffice.org and Firefox users
 - Installing the Live Edit OpenOffice.org extension (.oxt)
 - Installing Firefox Protocol Handler
 - Configuring the Firefox protocol handler
- For Google Chrome users under MS Windows
 - More in this guide
 - In other documentation

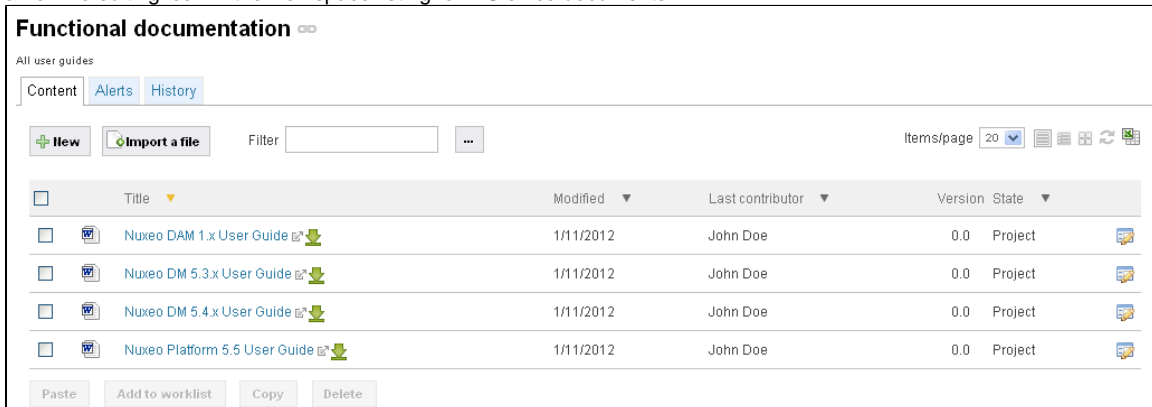
For MS Office and Internet Explorer users

To install Live Edit for MS Office:

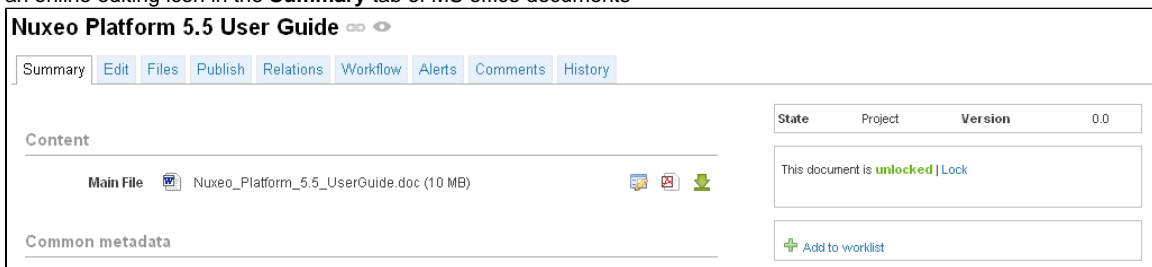
1. Run the Live Edit installer and follow the instructions.
2. If you are using Internet Explorer, close all windows and restart it.
3. Go on your Nuxeo application.
You now have new icons displayed:
 - MS Office icons below the search box



- an online editing icon in the workspace listing for MS office documents



- an online editing icon in the **Summary** tab of MS office documents



You can now [edit documents online](#).

For MS Office and Firefox users

Making LiveEdit work for MS Office documents when you use Firefox takes 3 steps:

1. Install Live Edit for MS Office,
2. Install the Firefox extension for Live Edit, called protocol handler,
3. Configure the Firefox protocol handler.

Installing Live Edit for MS Office

You need to install Live Edit for Microsoft Office using the same installer as for MS Office and Internet Explorer: just run the installer and follow the instructions displayed.

At the end of this step, you won't see the online editing icons, because you need to install and configure the Firefox protocol handler.

Installing Firefox Protocol Handler

The Firefox Live Edit extension is a regular Firefox extension and gets installed the same way as any other extension on that browser. To install it, click on the link to download it and follow the instructions displayed.

At this stage, you still won't see the online editing icons in the application. To see the icons and be able to edit documents, you need to configure the protocol handler.

Configuring the Firefox protocol handler

To configure Live Edit Firefox Protocol Handler:

1. In Firefox, go to **Tools > Add-ons > Nuxeo Live Edit Protocol Handler > Preferences (or Options)**.
2. Change the temp folder : /tmp/ with C:\Temp (or another temp folder like C:\Windows\Temp)
3. Set the mime-types you want to use Live Edit with and click on **Add new mapping** (see below for the mimetypes mapping).
4. Be sure that the checkbox "Use NXWss" is un-checked.
5. Be sure that the checkbox "Preserve compatibility" is un-checked.



Since version 0.4.6 of the protocol handler, there is a checkbox labeled "Preserve compatibility" that allows to preserve the backward compatibility.

This box **must** be checked when the targeted server is pre 5.2.

Without checking it, the add-on is forming a different type of headers allowing using of a bunch of new features like WebEngine (but it works only for the server 5.2 +). Simple said:

- if Live Edit appear not to work (there is no available Edit online link) and the targeted Nuxeo server is not 5.2 or higher, check that the "Preserve compatibility" is marked.
- if some cool features like WebEngine are not available (throwing exception) and the targeted Nuxeo server is 5.2 or higher, check that the "Preserve compatibility" is not marked.

6. Click **Ok**.

MS Office mimetype mapping with MS Office

File extension	Mimetype	Editor command	Editor command arguments
.doc	application/msword	C:\Program Files\Nuxeo\Nuxeo Live Edit MsOffice IE\nuxeo-liveedit-msoffice-launcher.exe	%s
.xls	application/vnd.ms-excel	C:\Program Files\Nuxeo\Nuxeo Live Edit MsOffice IE\nuxeo-liveedit-msoffice-launcher.exe	%s
.ppt	application/vnd.ms-powerpoint	C:\Program Files\Nuxeo\Nuxeo Live Edit MsOffice IE\nuxeo-liveedit-msoffice-launcher.exe	%s
.docx	application/vnd.openxmlformats-officedocument.wordprocessingml.document	C:\Program Files\Nuxeo\Nuxeo Live Edit MsOffice IE\nuxeo-liveedit-msoffice-launcher.exe	%s
.xlsx	application/vnd.openxmlformats-officedocument.spreadsheetml.sheet	C:\Program Files\Nuxeo\Nuxeo Live Edit MsOffice IE\nuxeo-liveedit-msoffice-launcher.exe	%s
.pptx	application/vnd.openxmlformats-officedocument.presentationml.presentation	C:\Program Files\Nuxeo\Nuxeo Live Edit MsOffice IE\nuxeo-liveedit-msoffice-launcher.exe	%s

For OpenOffice.org and Internet Explorer users

To make Live Edit work when you use OpenOffice.org and Internet Explorer, you need to:

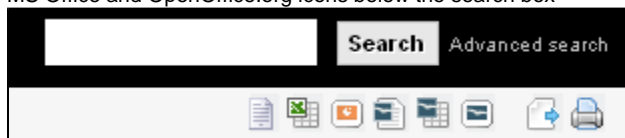
1. install the [MS Office - IE Live Edit](#) (see [Installing Live Edit for MS Office](#)),
2. install the OpenOffice.org - IE Live Edit extension (see below).

To install Live Edit for OpenOffice.org and Internet Explorer:

1. Run the [OpenOffice.org - IE Live Edit installer \(.exe\)](#) and follow the instructions displayed.
2. Restart Internet Explorer if you have windows open.
3. Go on your Nuxeo application.

You now have new icons displayed:

- MS Office and OpenOffice.org icons below the search box



- an online editing icon in the workspace listing for MS Office and OpenOffice.org documents

Functional documentation

All user guides

Content Alerts History

New Import a file Filter Items/page 20

	Title	Modified	Last contributor	Version	State
<input type="checkbox"/>	Nuxeo DAM 1.x User Guide	1/11/2012	John Doe	0.0	Project
<input type="checkbox"/>	Nuxeo DM 5.3.x User Guide	1/11/2012	John Doe	0.0	Project
<input type="checkbox"/>	Nuxeo DM 5.4.x User Guide	1/11/2012	John Doe	0.0	Project
<input type="checkbox"/>	Nuxeo Platform 5.5 User Guide	1/11/2012	John Doe	0.0	Project

Paste Add to worklist Copy Delete

- an online editing icon in the **Summary** tab of MS Office and OpenOffice.org documents

Functional documentation

All user guides

Content Alerts History

New Import a file Filter Items/page 20

	Title	Modified	Last contributor	Version	State
<input type="checkbox"/>	Nuxeo DAM 1.x User Guide	1/11/2012	John Doe	0.0	Project
<input type="checkbox"/>	Nuxeo DM 5.3.x User Guide	1/11/2012	John Doe	0.0	Project
<input type="checkbox"/>	Nuxeo DM 5.4.x User Guide	1/11/2012	John Doe	0.0	Project
<input type="checkbox"/>	Nuxeo Platform 5.5 User Guide	1/11/2012	John Doe	0.0	Project

Paste Add to worklist Copy Delete

You can now edit documents online.

For OpenOffice.org and Firefox users

To be able to edit OpenOffice.org documents online using Firefox, you need to:

1. install the Live Edit OpenOffice.org extension (.otx),
2. install the Firefox protocol handler,
3. configure the Firefox protocol handler.

Installing the Live Edit OpenOffice.org extension (.otx)

The [Live Edit extension for OpenOffice.org](#) is a regular OOo extension and gets installed the same way as any other extension: just double-click the .otx file and follow the instructions.



The Live Edit extension for OpenOffice requires Java support in OpenOffice, this is included in most of distributions, but on some Linux distributions you may need to install `openoffice-java-common` for the extension installation to work.

Then you need to install and configure the Firefox extension.

Installing Firefox Protocol Handler

The Firefox Live Edit extension is a regular Firefox extension and gets installed the same way as any other extension on that browser. To install it, click on the link to download it and follow the instructions displayed.

At this stage, you still won't see the online editing icons in the application. To see the icons and be able to edit documents, you need to configure the protocol handler.

Configuring the Firefox protocol handler

To configure Live Edit Firefox Protocol Handler:

1. In Firefox, go to **Tools > Add-ons > Nuxeo Live Edit Protocol Handler > Preferences (or Options)**.
2. Change the temp folder : /tmp/ with C:\Temp (or another temp folder like C:\Windows\Temp)
3. Set the mime-types you want to use Live Edit with and click on **Add new mapping** (see below for the mimetypes mapping).
4. Be sure that the checkbox "Use NXWss" is un-checked.
5. Be sure that the checkbox "Preserve compatibility" is un-checked.



Since version 0.4.6 of the protocol handler, there is a checkbox labeled "Preserve compatibility" that allows to preserve the backward compatibility. This box **must** be checked when the targeted server is pre 5.2. Without checking it, the addon is forming a different type of headers allowing using of a bunch of new features like WebEngine (but it works only for the server 5.2 +). Simple said:

- if Live Edit appear not to work (there is no available Edit online link) and the targeted Nuxeo server is not 5.2 or higher, check that the "Preserve compatibility" is marked.
- if some cool features like WebEngine are not available (throwing exception) and the targeted Nuxeo server is 5.2 or higher, check that the "Preserve compatibility" is not marked.

6. Click **Ok**.

OpenOffice.org and MS Office mimetype mapping with OpenOffice.org

File extension	Mimetype	Editor command	Editor command arguments
.doc	application/msword	C:\Program Files\OpenOffice.org 3\program\soffice.exe	macro:///LiveEditOOo.launcher.load(%s)
.xls	application/vnd.ms-excel	C:\Program Files\OpenOffice.org 3\program\soffice.exe	macro:///LiveEditOOo.launcher.load(%s)
.odt	application/vnd.oasis.opendocument.text	C:\Program Files\OpenOffice.org 3\program\soffice.exe	macro:///LiveEditOOo.launcher.load(%s)
.ods	application/vnd.oasis.opendocument.spreadsheet	C:\Program Files\OpenOffice.org 3\program\soffice.exe	macro:///LiveEditOOo.launcher.load(%s)
.odp	application/vnd.oasis.opendocument.presentation	C:\Program Files\OpenOffice.org 3\program\soffice.exe	macro:///LiveEditOOo.launcher.load(%s)



Live Edit OpenOffice.org is not compatible with MS Office 2007 documents yet.

For Google Chrome users under MS Windows

For Windows users, Chrome will use Windows registry where NuxeoLiveEdit protocol is declared (LiveEdit for MS IE must be installed). However some steps are needed to configure your computer and the server.

On your machine, you need to force Chrome to handle `nxedit` protocol:

1. Close Google Chrome because at shutdown it dumps its properties in the file we'll modify.
2. Edit the `Local State` file located under:
 - XP: C:\Documents and Settings\<USERNAME>\Local Settings\Application Data\Google\Chrome\User Data;
 - Vista/7: C:\Users\<USERNAME>\AppData\Local\Google\Chrome\User Data.
3. Add the protocol **nxedit** under the `protocol_handler` section, as such:

```
"protocol_handler": {
  "excluded_schemes": {
    ...
    "nxedit": false,
    ...
  }
}
```





If the section `protocol_handler` doesn't exist, find a `mailto` link and follow it, it should initialize this section.

Server side, because we don't have yet a mechanism to detect that LiveEdit is configured, you have to set a property to allow LiveEdit on each document type. As a consequence, you'll have to pay attention when clicking on LiveEdit links.





1. Edit `$NUXEO_HOME/templates/common/config/nuxeo.properties`.
2. Change the value for the property `org.nuxeo.ecm.platform.liveedit.config` from **client** to **server** (uncomment the line if needed).

3. Restart the Nuxeo server.

More in this guide

-  [Working with Live Edit](#)
-  [Installing Live Edit](#)
-  [Live Edit compatibility table](#)
-  [Manage your own file type with LiveEdit](#)

In other documentation

-  [LiveEdit makes MS Office slow to start](#) (Nuxeo Technical Knowledge Base (FAQ))
-  [Setup Firefox protocol handler with LiveEdit 2 for MS Office and OpenOffice.org](#) (Nuxeo Technical Knowledge Base (FAQ))
-  [LiveEdit icons are still available in Nuxeo after LiveEdit has been uninstalled](#) (Nuxeo Technical Knowledge Base (FAQ))
-  [I can't view my websites and blogs \(displays a message "The HTTP header field "Accept" with value..."](#) (Nuxeo Technical Knowledge Base (FAQ))

Live Edit compatibility table

The table below states the compatibility of Live Edit plugins with different versions of browsers and office software, for Nuxeo DM 5.4+.

Tested versions of Live Edit are:

- Live Edit MS Office-IE (.msi): 2.2.1
 - Live Edit OpenOffice Distribution (.exe): 2.2.1
 - FireFox Protocol Handler: 0.4.11
- More information on the plugin / environment correspondence on the [Live Edit Installation page](#).

On this page
<ul style="list-style-type: none"> • Windows XP environment • Windows 7 64b environment • Windows 7 32b environment • Internet Explorer 9 compatibility <ul style="list-style-type: none"> • More in this guide • In other documentation

Windows XP environment

	Internet Explorer 6	Internet Explorer 7	Internet Explorer 8	Internet Explorer 9	Firefox < 3.6	Firefox 3.6.3	Firefox 4+
Microsoft Office 2000	Not supported	Not supported anymore	Not supported anymore	N/A	Not supported anymore	Not supported anymore	Not supported anymore
Microsoft Office XP	Not supported	Not supported anymore	Not supported anymore	N/A	Not supported anymore	Not supported anymore	Not supported anymore
Microsoft Office 2003	Not supported	OK, except for a minor issue: LIVED-187	OK, except for a minor issue: LIVED-187	N/A	Not supported anymore	OK, except for a minor issue: LIVED-187	Testing in progress
Microsoft Office 2007	Not supported	Tested OK on development branch, but minor issues: LIVED-163 LIVED-164 LIVED-165 Tests on Live Edit 2.2.1 in progress	Testing in progress	N/A	Not supported anymore	Tested OK on development branch, but minor issues: LIVED-163 LIVED-164 LIVED-165 Tests on Live Edit 2.2.1 in progress	Testing in progress
OpenOffice.org 3.3	Not supported	OK	OK	N/A	Not supported anymore	OK	Testing in progress
LibreOffice 3.4	Not supported	OK	OK	N/A	Not supported anymore	OK	Testing in progress

Windows 7 64b environment

Nuxeo LiveEdit Microsoft Office is only compatible with Office in 32 bits.

Beware about its detection inside Internet Explorer. For the moment, out of the box, it will only be possible with the 32 bits version of your browser.

To enable the detection of your LiveEdit installation with Internet Explorer running in 64 bits mode, you need to import this file into your registry (regedit).

- Nuxeo LiveEdit Internet Explorer (64 bits) fix: [liveedit-ie-x64-fix.reg](#)

As LiveEdit installer is only built in 32 bits yet, Windows will write the registry entries into a compatibility node (WoW6432Node) read by 32 bits application running on 64 bits OS, and this file will add necessary keys to the default registry node read.

	Internet Explorer 6	Internet Explorer 7	Internet Explorer 8	Internet Explorer 9	Firefox < 3.6	Firefox 3.6.x	Firefox 4+
Microsoft Office 2000	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Microsoft Office XP	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Microsoft Office 2003	N/A	N/A	Not supported	Not supported	Not supported	Not supported	Not supported
Microsoft Office 2007	N/A	N/A	OK except for LIVED-163	Testing in progress	Not supported anymore	Testing in progress	OK except for LIVED-163
Microsoft Office 2010	N/A	N/A	LIVED-149	Testing in progress	Not supported anymore	LIVED-149	LIVED-149
OpenOffice.org 3.3	N/A	N/A	Testing in progress	Testing in progress	Not supported anymore	Testing in progress	Testing in progress
LibreOffice 3.4	N/A	N/A	Testing in progress	Testing in progress	Not supported anymore	Testing in progress	Testing in progress

Windows 7 32b environment

	Internet Explorer 6	Internet Explorer 7	Internet Explorer 8	Internet Explorer 9	Firefox < 3.6	Firefox 3.6.x	Firefox 4+
Microsoft Office 2000	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Microsoft Office XP	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Microsoft Office 2003	N/A	N/A	Not supported	Not supported	Not supported	Not supported	Not supported
Microsoft Office 2007	N/A	N/A	Testing in progress	Testing in progress	Not supported anymore	Testing in progress	Testing in progress
Microsoft Office 2010	N/A	N/A	OK	Testing in progress	Not supported anymore	Testing in progress	Testing in progress
OpenOffice.org 3.3	N/A	N/A	Testing in progress	Testing in progress	Not supported anymore	Testing in progress	Testing in progress
LibreOffice 3.4	N/A	N/A	Testing in progress	Testing in progress	Not supported anymore	Testing in progress	Testing in progress

Internet Explorer 9 compatibility

Internet Explorer 9 truncates the HTTP_ACCEPT header and prevents Live Edit to work. For instance:

- with IE 9 in default browsing mode, the HTTP_ACCEPT header looks like this:

```
text/html, application/xhtml+xml, */*
```

Two workarounds are possible:

- If you want to use Live Edit with the client side detection in Internet Explorer 9, you need to activate the "Internet Explorer 9 Compatibility view" browsing mode (F12 developer tools).





With IE 9 in compatibility mode, the HTTP_ACCEPT header is:

```
image/jpeg, application/x-ms-application, image/gif, application/xaml+xml, image/pjpeg, application/x-ms-xbap,
application/vnd.ms-excel, application/vnd.ms-powerpoint, application/msword,
application/x-nuxeo-liveedit;ext0="application/vnd.ms-excel",
application/x-nuxeo-liveedit;ext0="application/vnd.openxmlformats-officedocument.spreadsheetml.sheet",
application/x-nuxeo-liveedit;ext0="application/vnd.openxmlformats-officedocument.presentationml.presentation",
application/x-nuxeo-liveedit;ext0="application/vnd.openxmlformats-officedocument.wordprocessingml.document",
application/x-nuxeo-liveedit;ext1="application/vnd.ms-powerpoint", application/x-nuxeo-liveedit;ext2="application/msword",
/*
```





- Or you can force the detection of the Live Edit installation with a server side configuration:

- Edit \$NUXEO_HOME/templates/common/config/nuxeo.properties.
- Change the value for the property **org.nuxeo.ecm.platform.liveedit.config** from **client** to **server** (uncomment the line if needed).
- Restart the Nuxeo server.

More in this guide

-  [Working with Live Edit](#)
-  [Installing Live Edit](#)
-  [Live Edit compatibility table](#)
-  [Manage your own file type with LiveEdit](#)

In other documentation

-  [LiveEdit makes MS Office slow to start \(Nuxeo Technical Knowledge Base \(FAQ\)\)](#)
-  [Setup Firefox protocol handler with LiveEdit 2 for MS Office and OpenOffice.org \(Nuxeo Technical Knowledge Base \(FAQ\)\)](#)
-  [LiveEdit icons are still available in Nuxeo after LiveEdit has been uninstalled \(Nuxeo Technical Knowledge Base \(FAQ\)\)](#)
-  [I can't view my websites and blogs \(displays a message "The HTTP header field "Accept" with value..." \(Nuxeo Technical Knowledge Base \(FAQ\)\)](#)

Manage your own file type with LiveEdit

How to enhance Live Edit to take care of your own file type

By default, we recognize default office files (doc, docx, xls, xlsx, odt, ...) for both Microsoft Office and OpenOffice.org. But sometimes, you could be interested in managing other file types with Live Edit, and launching their associated editors.

With Internet Explorer

Recognized extensions are managed in the Windows Registry. They are simple string values, stored in **HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\Microsoft\Windows\CurrentVersion\Internet Settings\Accepted Documents** and using this model:

In a .reg file, a new handled extension should look like:

```
"liveedit_msoffice12_word_template"="application/x-nuxeo-liveedit;ext7="vnd.ms-word.template.macroEnabled.12"
```

The key is a unique name, and in this example, it is "liveedit_msoffice12_word_template".

The value is built like a MIME-TYPE: application/x-nuxeo-liveedit;extX="FILE_MIME_TYPE". In this example, the value is: "application/x-nuxeo-liveedit;ext7="vnd.ms-word.template.macroEnabled.12".



With Internet Explorer, Live Edit will open the associated program and save the edited file into Nuxeo when the program ended.



Do not forget to restart your browser after making changes.

See the attached file to enable all Microsoft Office extensions.

With Firefox

In the extension preferences form, you can directly add the editor / MIME-TYPE mapping. By doing this, it will be enough to enable a new extension.



With Firefox, you just receive a file descriptor with the file URL and authentication information. You also need to add a script to download the file, start the editor and upload it when finished.

Working with WebDAV and WSS

Nuxeo enables you to create and edit MS Office documents stored in Nuxeo directly from your OS desktop, without having to go on your Nuxeo application in your browser. This is possible thanks to the support of the WebDAV (*Web-based Distributed Authoring and Versioning*) and Windows SharePoint Service (WSS) protocols.

For both protocols, you don't need to install an extension or configure Nuxeo. You just need to add Nuxeo as a network drive. You will then be able to do the following actions on Nuxeo MS Office documents, from your OS desktop directly:

- create documents and folders,
- edit documents,
- move documents and folders.

Adding Nuxeo as an external drive

Depending on your OS, the steps to follow so Nuxeo is seen by the OS as an external drive are different depending on your OS.



The first time you do the mapping, make sure that you have already logged in to the web interface once. This is required to setup the Windows authentication protocol.

On this page

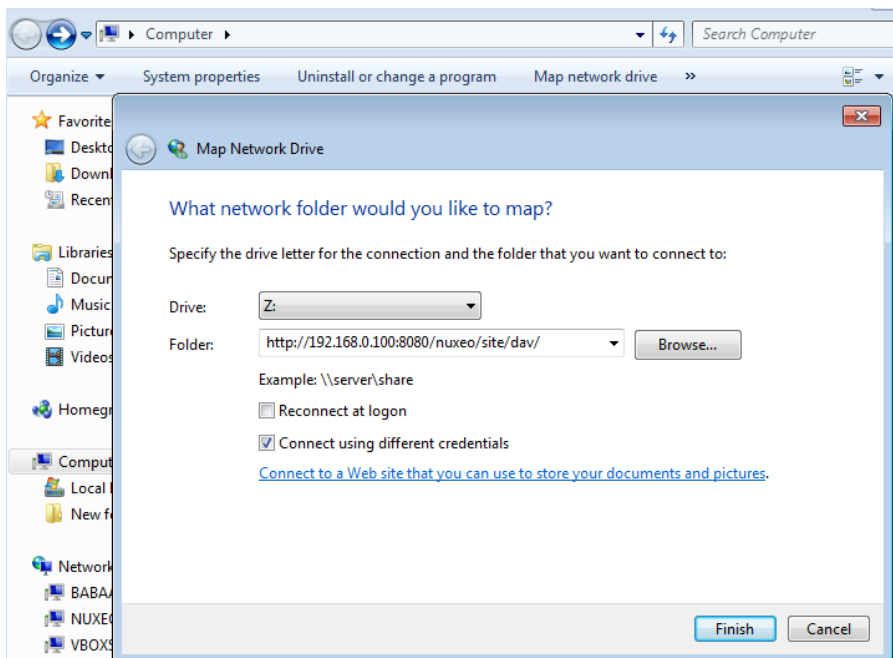
- [Adding Nuxeo as an external drive](#)
 - [Adding a new network place from Windows XP](#)
 - [Mapping a network drive from Windows 7 Explorer](#)
 - [Connecting to Nuxeo from Mac OS Finder](#)
 - [Connecting to Nuxeo from Linux](#)
- [Browsing Nuxeo from your OS](#)
- [Editing documents](#)
- [Creating content in Nuxeo](#)
 - [Related pages](#)
 - [Want to know more about WebDAV and WSS?](#)

Adding a new network place from Windows XP

1. From the Windows Explorer, open **My Network Places**.
2. Click on **Add a network place**.
The **Add Network Place Wizard** opens.
3. When asked for the Internet or network address, type the address of your Nuxeo application, for instance "http://localhost:8080/nuxeo/".
4. When prompted, type your username and password.
5. Give the application a name. This is the name that will be displayed in the network places.
6. Finish the steps.
The network place is created. You can now browse the content of your Nuxeo application in the Windows Explorer, from the network places.
If you checked the **Open this network place when I click Finish** box, the workspaces of the application are displayed in the explorer.

Mapping a network drive from Windows 7 Explorer

1. Open the Windows Explorer.
2. Click **Map network drive**.
3. Choose a Drive letter.
4. In **Folder**, type the address of your Nuxeo application adding the **site/dav/** suffix, for instance "http://localhost:8080/nuxeo/site/dav/".
Make sure **Connect using different credentials** is selected.



5. Click on **Finish**.
A connect window opens.
6. Type your login and your password and click on the **OK** button.

Connecting to Nuxeo from Mac OS Finder

1. From the Finder open the **Connect to Server** popup
2. Type the address of your Nuxeo application adding the **site/dav/** suffix, for instance "http://localhost:8080/nuxeo/site/dav/".
3. A connect window opens. Type your login and your password and click on the **OK** button.

Connecting to Nuxeo from Linux

The plugin comes with a default configuration which supports only a few clients. On Linux, it supports:

- cadaver, which enables you to browse the content of the Nuxeo application in command line like you would do with a FTP server;
- davfs, which enables you to mount Nuxeo and see it as a file system directory.

It is possible to [configure the application to work with other WebDAV clients](#).

Browsing Nuxeo from your OS

After you added the Nuxeo application as an external drive, you can browse the content of Nuxeo from your OS. You can see:

- workspaces,
- folders,
- templates,
- files,
- notes,
- pictures.

Editing documents

You can edit office documents available in your Nuxeo workspaces and folders from your OS, like any other local documents. The document is automatically locked in Nuxeo. When you save your modifications, they are saved in Nuxeo directly. When done, closing the document will unlock the document in Nuxeo.

Creating content in Nuxeo






You can create folders and documents in Nuxeo from your desktop. To create documents in a Nuxeo folder or workspace, you can:

- drag and drop files from a local folder into the target Nuxeo folder,
- create the document in the native office application and save it in the Nuxeo folder.



You can then create, copy and move documents and folders in Nuxeo via the Windows Explorer or Mac Finder the same way you would do in a

— local folder.

Related pages

-  [Working with WebDAV and WSS](#)
-  [Installing Live Edit](#)
-  [Manage your own file type with LiveEdit](#)
-  [Live Edit compatibility table](#)
-  [Working with Live Edit](#)

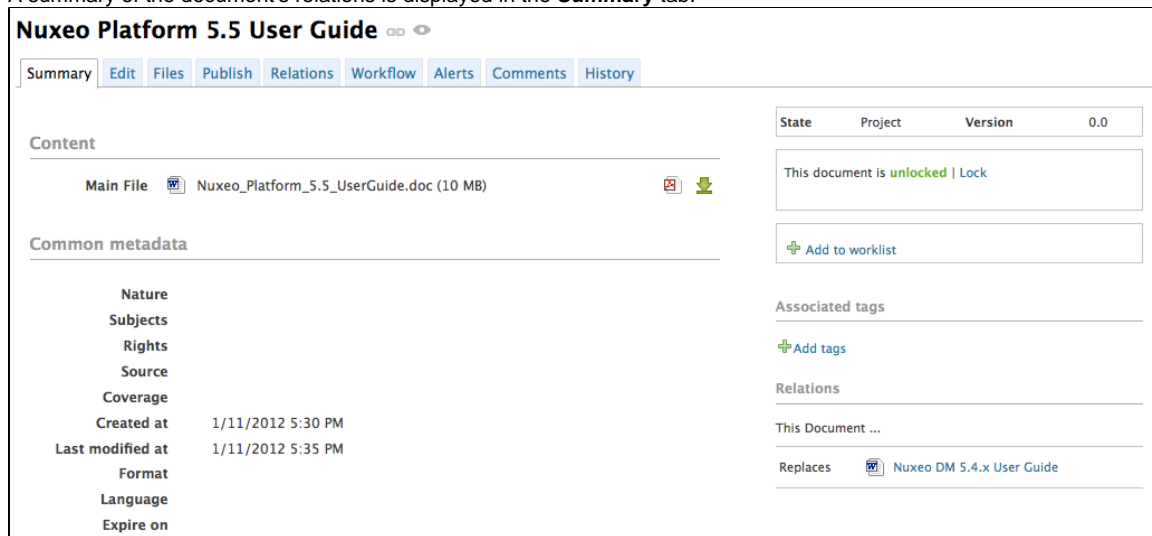
Want to know more about WebDAV and WSS?

-  [WSS before Nuxeo 5.4.2 \(Nuxeo Enterprise Platform \(EP\) - 5.5\)](#)
-  [WebDAV \(Nuxeo Enterprise Platform \(EP\) - 5.5\)](#)

Relations

Relations are informations that connect the application's documents with other documents or external resources. Documents are thus part of a coherent and organized structure.

A summary of the document's relations is displayed in the **Summary** tab.



The screenshot shows the 'Nuxeo Platform 5.5 User Guide' document page. The 'Summary' tab is selected, showing document metadata, content, and a list of relations. The document is titled 'Nuxeo Platform 5.5 User Guide' and is 10 MB in size. The 'Common metadata' section shows the document was created and last modified on 1/11/2012 at 5:30 PM and 5:35 PM respectively. The 'Relations' section shows a list of relations, including 'Replaces' and 'Nuxeo DM 5.4.x User Guide'.

You can also see all the document's relations in the **Relations** tab of the document. In **Relations** tab, relations are sorted by outgoing and incoming relations. Outgoing relations are relations that were created from the current document. Incoming relations are relations which were created from another document and to the current document.

The objects of the relation are hyperlinks. Click on the object's name to consult it.

Available relations are:

- reference relation (references, is referenced by),
- basis relation (is based on, is base for),
- replacement relation (replaces, is replaced by),
- requirement relation (requires, is required by),
- compliance relation (conforms to, has conform).

Adding a relation

You need to have writing or management rights to add relations on a document.

You can create a relation from a document to:

- another document on the application,
- an external document (using URI),
- a text.

You can create relations between documents from different workspaces or domains.

When you add a relation on a document, it creates what we call an "outgoing" relation. The document to which you added the relation automatically has an "incoming" relation.

To create a relation:

1. Click on the **Relations** tab of the document.
 2. Click on the **Add a new relation** link.
- The relation creation form is displayed under the link.

Add a new relation

Predicate*

Select a value

Text

Object*

Resource URI


Document

Search


Comment

Add

3. Fill in the relation creation form.
 4. Click on the **Add** button.
- The relation is displayed as an outgoing relation, under the relation creation form.

Outgoing relations						
Predicate	Object	Creation	Author	Comment	Operations	
Replaces	 Nuxeo DM 5.4.x User Guide	1/16/2012 2:06 PM	system	Updated for 5.5 release	Delete	

An incoming relation is automatically created in the target document's **Relations** tab, that directs to the source document of the relation.

Incoming relations					
Predicate	Object	Creation	Author	Comment	
Is replaced by	 Nuxeo Platform 5.5 User Guide	1/16/2012 2:06 PM	system	Updated for 5.5 release	

Relations are also displayed in the **Summary** tab of the document.

Deleting a relation

You need to have writing or management rights to delete the relations of a document.

You can delete outgoing relations only.

To delete a relation:

1. Click on the **Relations** tab of the document.
 2. Click on the **Delete** link corresponding to the relation.
- The relation is deleted and does not appear in the table anymore. It is also removed from the incoming relations of the target document.

Comments

You can add comments on the documents, via the **Comments** tab. Comments enable users to discuss about the document and its evolution.

Comments are attached to the document in the workspace. When the document is published, comments are not published with it.

All users can see the comments added on a document.

Adding a comment on a document

You need reading rights to add comments on documents.

To add a comment on a document:

1. Click on the **Comments** tab of the document.
2. Click on the **Add a comment** link.

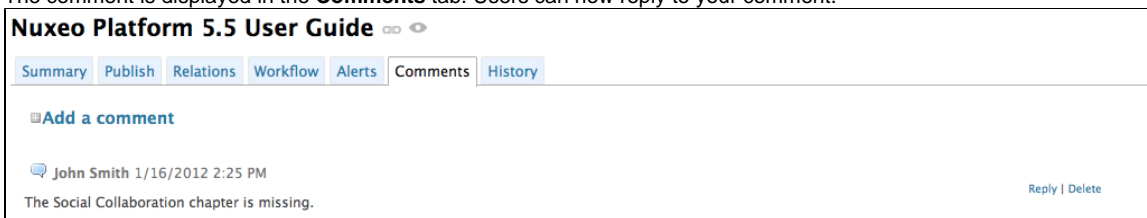
A form to add a comment is displayed.



The screenshot shows the 'Nuxeo Platform 5.5 User Guide' document page. The 'Comments' tab is selected, and the 'Add a comment' link is visible. Below the link is a large text input area and two buttons: 'Add' and 'Cancel'.

3. In the text area, type your comment.
4. Click on the **Add** button.

The comment is displayed in the **Comments** tab. Users can now reply to your comment.



The screenshot shows the 'Nuxeo Platform 5.5 User Guide' document page with the 'Comments' tab selected. A comment by John Smith, dated 1/16/2012 2:25 PM, is displayed: 'The Social Collaboration chapter is missing.' To the right of the comment are links for 'Reply' and 'Delete'.

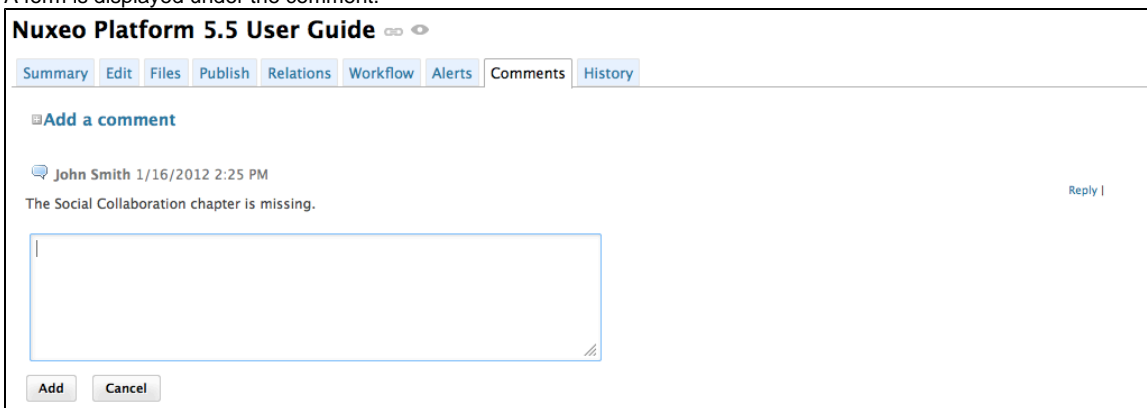
Replying to a comment

You need to have reading rights to reply to comments on documents.

When you want to react to a comment, you can reply to it. Answers are inserted right after the comment they reply to, making it easy to read the thread of discussion.

To reply to a comment:

1. Click on the **Reply** link on the comment.
- A form is displayed under the comment.



The screenshot shows the 'Nuxeo Platform 5.5 User Guide' document page with the 'Comments' tab selected. A comment by John Smith, dated 1/16/2012 2:25 PM, is displayed: 'The Social Collaboration chapter is missing.' To the right of the comment is a 'Reply' link. Below the comment is a large text input area and two buttons: 'Add' and 'Cancel'.

2. Type your comment in the text area.
 3. Click on the **Add** button.
- The answer is inserted after the comment it replies to.

Nuxeo Platform 5.5 User Guide

[Summary](#)
[Edit](#)
[Files](#)
[Publish](#)
[Relations](#)
[Workflow](#)
[Alerts](#)
[Comments](#)
[History](#)

Add a comment

John Smith 1/16/2012 2:25 PM

The Social Collaboration chapter is missing.

[Reply](#)

John Doe 1/16/2012 2:35 PM

Chapter has been added. Thanks for reporting this :)

[Reply](#) | [Delete](#)

Deleting comments

Only the author of the comment and users with management rights can delete the comments of a document.

Deleting a comment is a permanent action. You cannot restore deleted comments.

To delete a comment:

1. Click on the **Comments** tab of the document.
2. Click on the **Delete** link displayed in the top right corner of the comment.

John Doe 1/16/2012 2:35 PM

Chapter has been added. Thanks for reporting this :)

[Reply](#) | [Delete](#)

The comment is immediately erased.

Annotations

Annotations are post-its or comments placed on the preview of documents.

You can annotate documents as soon as you can access them, ie when you have at least "Read" right.

To annotate a document:

1. Click on the icon of the document.
The document's preview is displayed in a pop up window.
2. Draw a frame on the preview.
An input pop up appears.
3. Type your comment.

Documentation > Technical documentation > Nuxeo Platform 5.5 system requirements

Content Brochure_System_Requirements_EN.pdf

Files There are no files attached to this document.

Hide annotations

background image

Comment

Update product name

Submit Cancel

nents

technical foundation of
System requirements
software platform.

Deep Integration Across IT Ecosystems

Server

- OS: Windows 2003+, Mac OS X, Unix, Linux. Nuxeo products operate on any system that runs a Sun JVM 1.5 or 1.6. For Windows, a 64 bit server is recommended. Nuxeo ECM products support virtual environments.

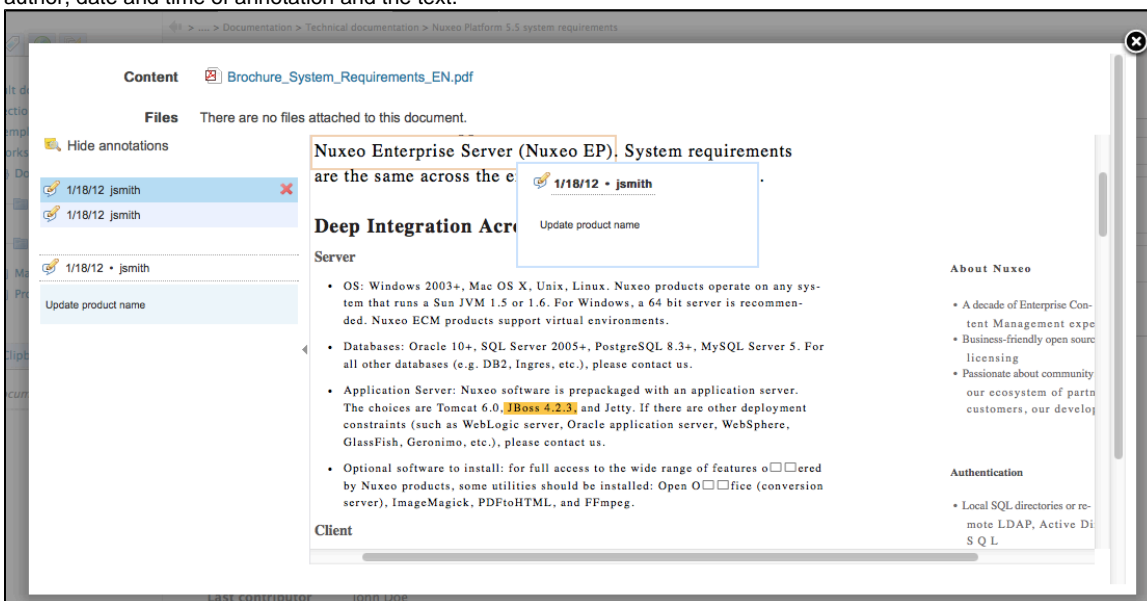
About Nuxeo

- A decade of Enterprise Content Management

Last Contributor John Doe

4. Click on **Submit**.
The annotation is saved.

You can see your annotation when the mouse is over the zone you selected, and, in the margin, the list of annotations, and for each, the author, date and time of annotation and the text.

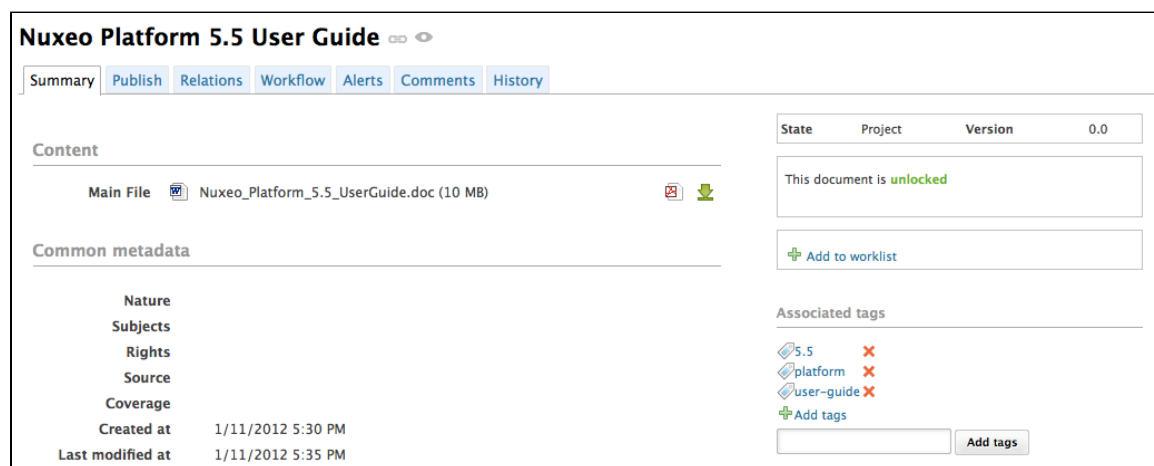


Tags

Tags are labels that you can add on documents to help you describe them.

Unlike subjects in the metadata of the document, you don't have to choose tags in a closed list. You are free to apply the labels that describe the document best. However, tags are proposed as you type them, to enable you to use the same tags as the other users and have a consistent tagging of documents.

You can add as many tags on documents as you want.



You can then use the tag cloud to find all documents that have the same tags.




Tagging documents

Users can add a tag on a document as soon as they can access the document, ie as soon as they have reading rights.


Documents can be tagged in workspaces and in sections. When a document is published, the tags applied in the workspaces are not published with the document. You can have tags in the workspace that are more collaborative work oriented than in the section.


To tag a document:

1. Go on the **Summary** tab of the document.
2. Click on the **Add tags** link.
A text area is displayed below the link.
3. Type a label.

 Tags already used are proposed from 3 letters typed.


Associated tags


 5.5 ✕

 platform ✕

+ Add tags

Add tags

 screencast

 screenshot

4. Click the button **Add tags** button.
The tags are immediately available in the tag cloud.

Removing tags

You need to be the user who added the tag on the document or have at least *write* right on the document to be able to remove a tag from a document.

To remove a tag from a document, click on the icon ✕.
The tag is immediately removed.

Document's history

All the actions that are done on the document are registered in the document's history, with several informations, such as the date and time, the user, the comment, etc.

Event log		Archived versions					
Filter						Items/page 10	
Performed action	Date	Username	Category	Directive	Due date	Comment	State
Unlock document	1/18/2012 1:56 PM	John Doe	Document				Project
Modification	1/18/2012 1:55 PM	John Doe	Document			Updated metadata	Project
Version created	1/18/2012 1:55 PM	John Doe	Document			0.1 Updated metadata	Project
Lock document	1/18/2012 1:55 PM	John Doe	Document				Project
Relation created	1/16/2012 2:06 PM	John Doe	Document				Project
Relation deleted	1/16/2012 2:04 PM	John Doe	Document				Project
Relation created	1/16/2012 2:01 PM	John Doe	Document				Project
Modification	1/11/2012 5:35 PM	John Doe	Document				Project
Creation	1/11/2012 5:30 PM	John Doe	Document				Project

To consult the document's history, click on the **History** tab.

The **History** tab also displays the previous versions of the document that were archived when the document was edited and its version increased. All previous versions can be consulted. You can also restore or delete archived versions.

Viewing a previous version of a document

All users can consult the previous versions of a document.

Every time you modify a document, you can decide to save and archive the state of the document as a new version. Thus the modifications are not erased by future modifications of the document.

The archived versions are listed in the "Archived versions" sub-tab.

Event log Archived versions	
Version	Action
0.1	Restore View archived version
0.2	Restore View archived version

To consult a previous version of a document, click on the **View archived version** button corresponding to the chosen version. The archived version opens.

Archived versions have few actions available: you can only [create relations](#) from it to another document, [annotate](#) it and subscribe to [notifications](#).

Restoring a older version of a document

You need to have "version", "write" or "manage everything" rights to restore a previous version of a document.

Restoring an archived version means making it the current version of the document. The modifications done since that old version are thus not taken into account anymore.

To restore an archived version, click on the **Restore** button corresponding to the chosen version. The document is displayed as it was for the chosen version and has the same archived version's number. The next time it will be modified, its version number will automatically be increased.

For instance, your document's version is currently 0.3. When you click on the **Restore** button of the version 0.1, the Summary tab of the document is displayed : the content and metadata are the one of version 0.1, and the version number is 0.1. When the document is modified, the version number is automatically increased to 0.3+.

Event log Archived versions	
Version	Action
0.1	Restore View archived version Delete
0.2	Restore View archived version Delete

Deleting a older version of a document

You need to have "version", "write" or "manage everything" rights to delete a previous version of a document.



Version deletion is a permanent action.

To delete an archived version, click on the **Delete** button corresponding to the chosen version. The version is immediately and permanently deleted.

Alerts

Nuxeo DM includes several ways to stay informed of the evolution of the documents.

You can set alerts for yourself and you can also set alerts for other users.

To be informed of content modifications, you can subscribe to email notifications or feeds.

To keep other users notified of the space activity, you can set alerts for users or groups of users so they are automatically informed or send them occasional emails.

Sending an email

You can send occasional emails to users, to draw their attention on the document. Emails are available on documents only.


You need to have at least reading rights to send emails.

To send an email to a user or a group of users:

1. On the document, click on the envelope icon, located at the right of the breadcrumb trail section, next to the Print icon.
The email creation form is displayed.
2. Type the name of the user or group you want to send the email to, in the search box.
The search is automatically done as you type the name of the user or group.

Add New User

Search

Type	Username	Action
	aturing (Alan Turing)	Add to selection


Selected Users

Your user selection is empty

3. Click on the **Add to selection** link corresponding to the users or groups whose subscriptions you want to manage.
They are displayed in your selection.

Add New User

Search

Type	Username	Action
	aturing (Alan Turing)	Add to selection

Selected Users

Username	Action
aturing	Remove from selection

Empty the selection

4. Type the subject and the content of your email.

Available alerts	
<input type="radio"/> Comments moderation	Subscribe
<input type="radio"/> Modification	Subscribe
<input type="radio"/> Creation	Subscribe
<input type="radio"/> Workflow changed	Subscribe
<input type="radio"/> Approval workflow started	Subscribe

A green check mark is displayed in front of the notification you have subscribed to and an **Unsubscribe** button is displayed instead of the **Subscribe** button.


Available alerts	
<input type="radio"/> Comments moderation	Subscribe
<input checked="" type="radio"/> Modification	Unsubscribe
<input type="radio"/> Creation	Subscribe
<input type="radio"/> Workflow changed	Subscribe
<input type="radio"/> Approval workflow started	Subscribe

If the workspace or section manager subscribed you to a notification, the notification is already checked. The notifications subscribed for a group are indicated in the **My Subscriptions** tab of users as inherited subscriptions.

Inherited alerts	
<input checked="" type="radio"/> Creation	
Available alerts	
<input type="radio"/> Comments moderation	Subscribe
<input checked="" type="radio"/> Modification	Unsubscribe
<input type="radio"/> Creation	Subscribe
<input type="radio"/> Workflow changed	Subscribe
<input type="radio"/> Approval workflow started	Subscribe

Unsubscribing from notifications

You need to have at least reading rights to unsubscribe from notifications.

 You cannot unsubscribe from notifications subscribed for your group.

To unsubscribe from notifications:

1. In the space, click on the **My Subscriptions** tab.
2. Click on the **Unsubscribe** button corresponding to the notification you want to unsubscribe from.

Available alerts	
<input type="radio"/> Comments moderation	Subscribe
<input checked="" type="radio"/> Modification	Unsubscribe
<input type="radio"/> Creation	Subscribe
<input type="radio"/> Workflow changed	Subscribe
<input type="radio"/> Approval workflow started	Subscribe

A button **Subscribe** is displayed instead of the **Unsubscribe** button.

Available alerts	
◦ Comments moderation	<button>Subscribe</button>
◦ Modification	<button>Subscribe</button>
◦ Creation	<button>Subscribe</button>
◦ Workflow changed	<button>Subscribe</button>
◦ Approval workflow started	<button>Subscribe</button>

Managing subscriptions

Only users with management rights can manage the users' subscriptions.

Users with management rights can see the subscriptions users have signed up to. They can also subscribe users or groups to subscriptions or unsubscribe them.

To manage subscriptions:

1. In the space, click on the **Manage** tab.
2. Click on the **Subscriptions** sub-tab.
The lists of users subscribed to each notification type is displayed above a subscription form.
3. Type the name of a user or a group in the search box.

4. Click on the user or group you want to subscribe to a notification.
The user or group is displayed on the right of the search box.

5. Select the action you want to do (**Subscribe** or **Unsubscribe**) and the notification concerned.
6. Click on the **Register** button.
The modifications are displayed in the list of subscriptions.

Creation

John Doe

Search for users or groups

To start the search, please type at least 3 character(s)

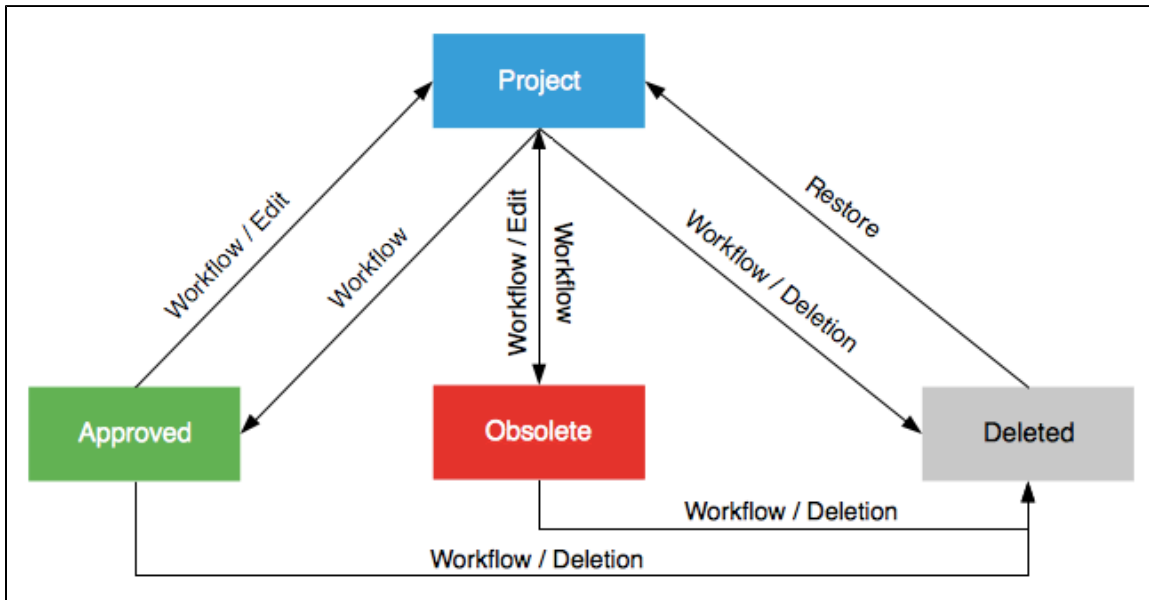
Action Subscribe

Alert Comments moderation

Register

Workflows

All the documents evolve according to a defined life cycle. This life cycle is composed of the following states: project, approved, obsolete and deleted. To change the document's life cycle state, you have to submit it to a workflow.



A workflow is a process in which a chain of users is defined to review and approve or reject the document.

When a document is submitted to a workflow, the users who participate to the workflow have an indication of what they need to do on the document. This is the directive. The workflow is automatically ended when all participants have reviewed the document. Then, the document moves into the pre-defined life cycle state.

There are two types of workflow:

- parallel workflow,
- approval workflow.

The difference between the two workflows is the participation order. In a parallel workflow, all users can review the document as soon as the workflow is started. An approval workflow, on the other hand, is an ordered workflow. This means that participants can review the document only when the previous participant in the list has approved the document.

Users who are involved in workflows are alerted by email and can have a synthetic view of all the tasks they have to do on documents in their [dashboard](#). The documents they have to review are listed there.

Starting a workflow


You need to have writing or management rights to start a workflow.

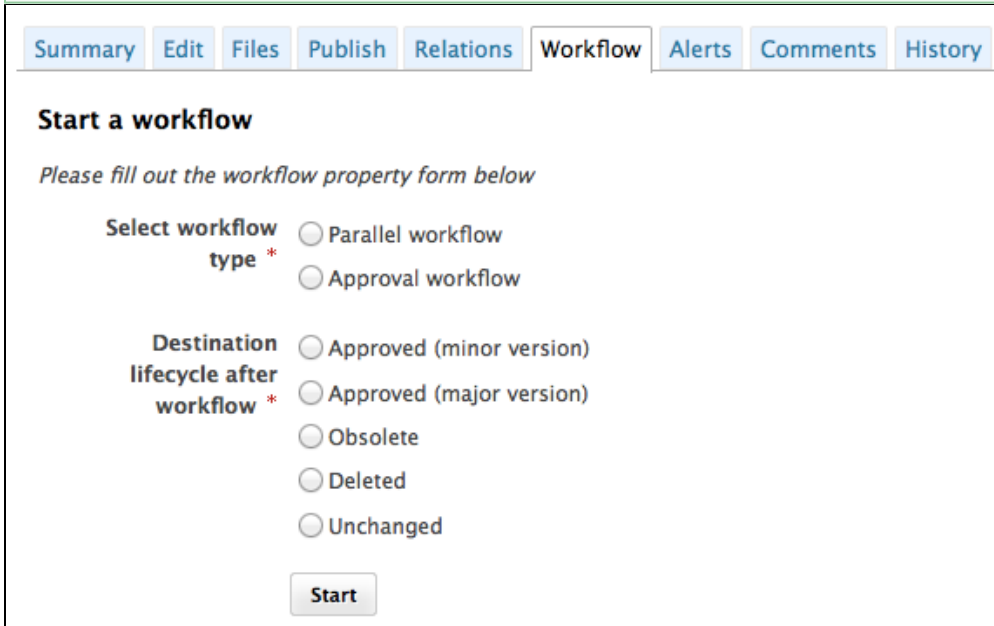


The process to start a workflow is the same for both workflows.


To start a workflow:

1. Click on the **Workflow** tab of the document.
2. Fill in the form **Start a workflow**: select the type of workflow you want to start and the output life cycle state.

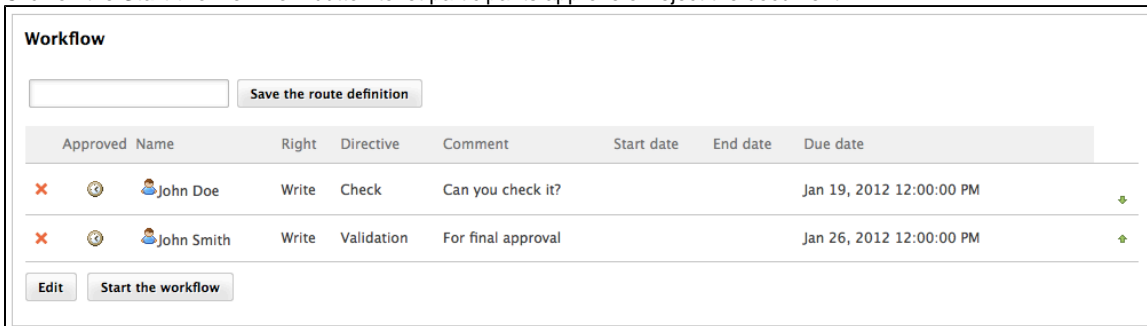
 Selecting the "Approved" output life cycle state makes the document life cycle change to "Approved" and increments the document's version. You need to select if you want to increment the minor version or major version.



3. Click on the **Start** button.
4. Add users on the workflow.

 You are not automatically declared as a participant of the workflow. If you want to participate to the workflow, you need to add yourself as a participant.

5. Click on the **Start the workflow** button to let participants approve or reject the document.



Managing the workflow participants

When you prepare a workflow, you determine which users will review the document.

Given the workflow type and your participation to the workflow, you can add new participants, change their order of participation, or remove them. To make recurrent participants management easier, you can also use reviewers lists.

On this page

- [Adding participants to a workflow](#)
- [Managing reviewers lists](#)
 - [Saving a list](#)
 - [Loading a list](#)
 - [Deleting a list](#)
- [Moving participants in the workflow](#)
- [Editing the workflow route](#)
- [Removing participants](#)

Adding participants to a workflow

Only the workflow initiator and administrators can add users on a workflow.

Approval workflow participants can also add new users when they are the current reviewer of the document. As soon as they approved it, they cannot manage the workflow participants anymore.

To add a participant:

1. On the **Workflow** tab, in the **Select reviewers** form, type the name of a user or a group.
The users and groups corresponding to the letters typed are displayed.

2. Click on the user you want to add on the workflow.
3. Fill in the other fields of the form (see below for details).
4. Click on the **Add** button.

The new participant is added below the current participant.

You can also [load a reviewers list](#).

Reviewer selection form parameters

Field	Description
Reviewers	Search and select users or groups.
Right	This field enables you to grant reviewers with access rights on the document for the time of the workflow.
Directive	Select in the list what you expect from the reviewer.
Due date	Select the maximum date at which you expect the user to have completed his task on the workflow. When the due date is reached or passed, the task is displayed in red in the reviewer's dashboard.
Comment	Type a comment to give more details to the reviewer about what you expect from him during the workflow, for instance if you want him to pay attention to a specific part of the document.

Managing reviewers lists

You can save the lists of workflow participants, to reuse them later on the same type of workflow. Indeed, documents often go through the same chains for review or approval.

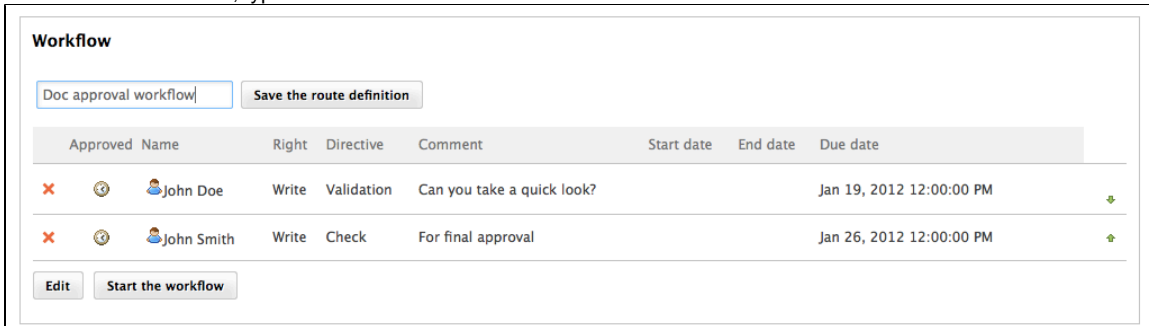
Workflow participants lists are saved by user and by workflow type. This means that users can only see the lists they saved, not the list other users saved. And that a list can only be used on the same workflow type as the workflow it was saved from.

Saving a list

Any user can save a workflow participants list.

To save a list of participants:

1. Go on the **Workflow** tab of the document.
2. In the **Workflow** section, type a name for the list.



The screenshot shows the 'Workflow' tab interface. At the top, there is a text input field containing 'Doc approval workflow' and a 'Save the route definition' button. Below this is a table with columns: 'Approved', 'Name', 'Right', 'Directive', 'Comment', 'Start date', 'End date', 'Due date', and an expand/collapse icon. The table contains two rows of data:

Approved	Name	Right	Directive	Comment	Start date	End date	Due date	
	John Doe	Write	Validation	Can you take a quick look?			Jan 19, 2012 12:00:00 PM	
	John Smith	Write	Check	For final approval			Jan 26, 2012 12:00:00 PM	

At the bottom of the table, there are two buttons: 'Edit' and 'Start the workflow'.

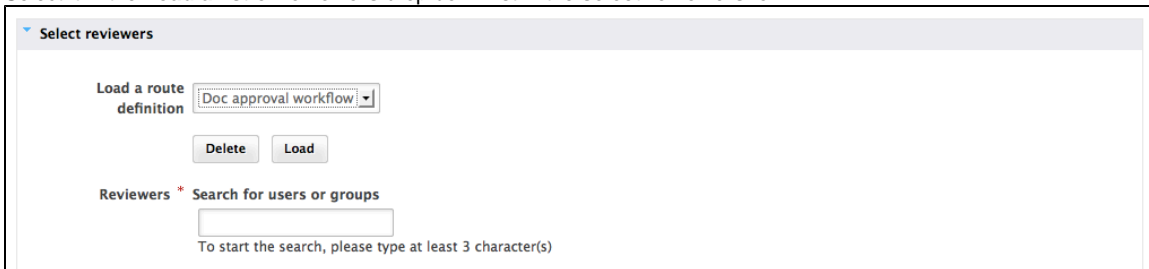
3. Click on the **Save the list** button.
The list is saved and is now available in the **Select reviewers** form.

Loading a list

You can load a list of participants at any time, as long as you have the right to add reviewers on the workflow. You can also combine the use of a list and the manual management of participants (move, add, remove).

To load a list:

1. Select it in the **Load a list of reviewers** drop down list in the **select reviewers** form.



The screenshot shows the 'Select reviewers' form. It has a title bar 'Select reviewers'. Below the title bar, there is a section 'Load a route definition' with a dropdown menu showing 'Doc approval workflow'. Below this are 'Delete' and 'Load' buttons. Further down, there is a section 'Reviewers * Search for users or groups' with a text input field. Below the input field, there is a hint: 'To start the search, please type at least 3 character(s)'.

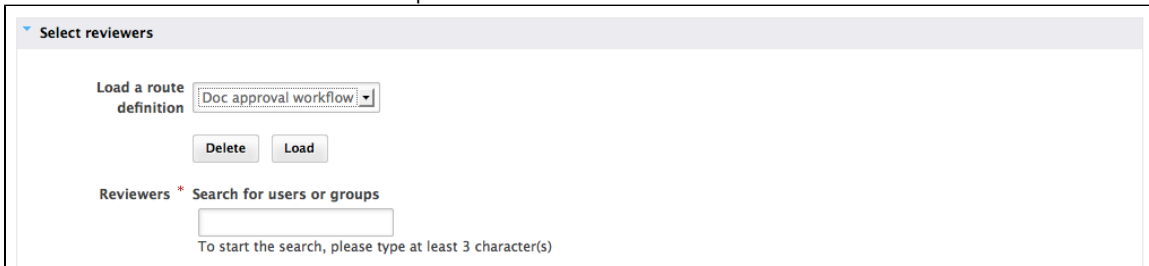
2. Click on the **Load** button.

Deleting a list

You can delete the lists of reviewers you have saved from a workflow.

To delete a participants list:



1. Select it in the **Load a list of reviewers** drop down list in the **select reviewers** form.









This screenshot is identical to the one above, showing the 'Select reviewers' form with the 'Load a route definition' dropdown set to 'Doc approval workflow' and the 'Reviewers * Search for users or groups' section.

2. Click on the **Delete** button.

Moving participants in the workflow

Users who can add participants to a workflow can also change their order on the workflow. Use the  and  arrows to move users up and down in the workflow.

Workflow

Approved	Name	Right	Directive	Comment	Start date	End date	Due date
	 John Doe	Write	Check	Can you check it?			Jan 19, 2012 12:00:00 PM 
	 John Smith	Write	Validation	For final approval			Jan 26, 2012 12:00:00 PM 









Editing the workflow route

The workflow initiator can edit the workflow route, to edit the due dates and other parameters for instance, especially when the route is based on a participants list.

To edit a participants list:

- Under the workflow route, click on the **Edit** button.
The route is displayed in edit mode.

Workflow


Approved	Name	Right	Directive	Comment	Start date	End date	Due date
	 John Doe	<input type="text" value="Write"/>	<input type="text" value="Validation"/>	Can you take a quick look?			1/19/2012 12:00 PM  
	 John Smith	<input type="text" value="Write"/>	<input type="text" value="Check"/>	For final approval			1/26/2012 12:00 PM  

- Change the parameters you want.
- Click on the **Save** button.
The route is updated with your new parameters.

Removing participants

Users who can add participants to a workflow can also remove them from the workflow.

To remove a user from the workflow's participants:

- Click the icon  to remove from the workflow.
- Confirm removal on the window that pops up.
Users is immediately removed from the participants of the workflow.

Participating to a workflow

Once the workflow has been started, users added on the workflow's roadmap can review the document and approve or reject it.

Workflow

Approved	Name	Right	Directive	Comment	Start date	End date	Due date	
	John Doe	Write	Validation	Solen Guitter : Can you take a quick look?	Jan 19, 2012 5:17:20 PM		Jan 19, 2012 12:00:00 PM	Approve Reject
	John Smith	Write	Validation	For final approval			Jan 26, 2012 12:00:00 PM	

Add a comment below and click one of the links in the table above. You will find all your tasks in your personal dashboard as well. The comment is mandatory only when the task is rejected.

Comment ^{*}



The workflow initiator can approve or reject the document in behalf of all the workflow's participants.

On this page

- [Approving a document](#)
- [Rejecting a document](#)
- [Ending the workflow](#)

Approving a document

In a parallel workflow, participants can approve the document as soon as the workflow is started.

In an approval workflow, participants can approve the document when it's their turn, after the previous participant on the workflow has approved it.

To approve the document during the workflow:

Click on the **Approve** link displayed on the workflow's roadmap next to your name.

A green tick on the roadmap indicates that you approved the document.

If you are in an approval workflow, the next participant can now review the document and approve or reject it.

Workflow

Approved	Name	Right	Directive	Comment	Start date	End date	Due date	
	John Doe	Write	Validation	Solen Guitter : Can you take a quick look?	Jan 19, 2012 5:17:20 PM	Jan 20, 2012 12:00:00 PM	Jan 19, 2012 12:00:00 PM	
	John Smith	Write	Validation	Solen Guitter : For final approval	Jan 20, 2012 12:00:01 PM		Jan 26, 2012 12:00:00 PM	

Add a comment below and click one of the links in the table above. You will find all your tasks in your personal dashboard as well. The comment is mandatory only when the task is rejected.

Comment ^{*}

Rejecting a document

In a parallel workflow, participants can review the document and reject it as soon as the workflow is started.

In an approval workflow, participants can reject the document when it's their turn, after the previous participant on the workflow has approved it.

To reject the document during the workflow:

1. Type a comment to indicate why you reject the document (mandatory).
2. Click on the **Reject** link displayed on the workflow's roadmap next to your name.
A red tick on the roadmap indicates that you rejected the document.

If you are in an approval workflow, the previous user on the roadmap is automatically inserted after you on the roadmap to check the document. His directive is "Verification after reject".

Workflow

Approved	Name	Right	Directive	Comment	Start date	End date	Due date
	John Doe	Write	Validation	Solen Gutter : Can you take a quick look?	Jan 19, 2012 5:17:20 PM	Jan 20, 2012 12:00:00 PM	Jan 19, 2012 12:00:00 PM
	John Smith	Write	Validation	Solen Gutter : For final approval	Jan 20, 2012 12:00:01 PM	Jan 20, 2012 12:00:54 PM	Jan 26, 2012 12:00:00 PM
	John Doe		Verification after reject	John Smith : Commercial section is missing.	Jan 20, 2012 12:00:54 PM		

Add a comment below and click one of the links in the table above. You will find all your tasks in your personal dashboard as well. The comment is mandatory only when the task is rejected.

Comment *

Ending the workflow

The workflow will automatically ends when the last reviewer approves or rejects the document.

In a parallel workflow:

- If all participants have approved the document, its lifecycle state changes into the one chosen when before the workflow was started.
- If a user has rejected the document, the workflow ends but its lifecycle state doesn't change.

In an approval workflow, all users must approve the document. The document will then automatically get into the target lifecycle state.

Abandoning a workflow

Only the workflow initiator and administrators can abandon a workflow.

Abandoning a workflow means canceling it. When you abandon a workflow, the life cycle state of the document does not change. The modifications made on the document during the workflow are kept.

The abandon process is the same for the two types of workflows.

To abandon a workflow:

1. Click on the **Workflow** tab of the document.
2. In the **Abandon workflow** section of the page, type a comment in the **Comment** field.

Abandon workflow

Comment *

Comment is mandatory to abandon a workflow.

3. Click on the **Abandon workflow** button.
The workflow is canceled. The life cycle state of the document does not change and the modifications done during the workflow are saved.

Forums

A forum is a discussion space in which users can talk together. A forum is organized around different topics, in which users can add comments. Topics and comments are displayed in threads.

As for workspaces and sections, the access to a forum is defined by access rights. Forum access rights are the same as workspace access rights. However, in the case of a [moderated topic](#), some users are declared "moderators" and are in charge of the approval of the topic content.

Forum creation and edition are available for users with "Write" and "Manage" rights.

Users with "Manage" rights can also manage the forum like a workspace, ie [give users access rights](#), set [alerts](#) and manage the forum's [trash](#).

Creating a forum

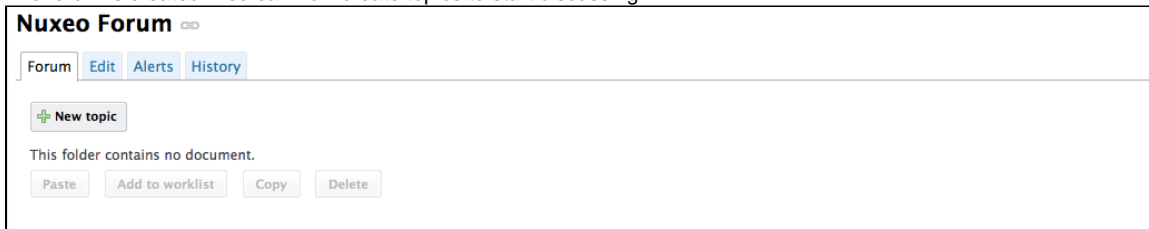
You need 'Write' or 'Manage' rights to be able to create a forum.

You can create forums only in workspaces.

To create a forum:

The page Create content could not be found.

The forum is created. You can now create topics to start discussing.



Editing a forum

You need 'Write' or 'Manage' rights to edit a forum.

When you edit a forum, you modify its title and its description.

To edit a forum:

1. On the forum, click on the **Edit** tab.
2. Modify the title or the description of the forum. You can also add a comment explaining what you edited on the forum.
3. Click on the **Save** button.
The modifications are saved and the **Forum** tab is displayed.

Related pages

- [Managing topics](#)
- [Participating to a topic](#)
- [Alerts](#)
- [Sending an email](#)
- [Setting automatic notifications](#)
- [Managing access rights](#)
- [Document Management concepts](#)

Managing topics

A topic can be moderated, that is to say that the content needs to be approved in order to be available to forum readers.

- In an topic without moderation, the content is available without preliminary approval.
- In a moderated topic, the content needs to be approved by a moderator to be visible for users.



You are automatically added as a moderator if you create a moderated topic.

On this page

- Adding a topic
- Moderating a topic
 - Approving a comment
 - Rejecting a comment
- Deleting a comment
- Deleting a topic
 - Related pages:

Adding a topic

To add a new topic in a forum:

1. In the **Forum** tab of the forum, click on the **New Topic** button.
 2. Type the topic's title and optionally add a description.
 3. Select if the topic is moderated or not. If yes, search and select the moderators.
 4. Click on the **Create** button.
- The **Topic** tab of the topic is displayed, with the form to add a first comment on the topic.

The screenshot shows the 'Nuxeo features' topic page in the 'Topic' tab. It includes a 'Topic' and 'Alerts' tab bar. Below is the 'Add a comment' section with a 'Title' field, a 'Comment' text area, and an 'Attach a file' section with 'None' and 'Upload' options. The 'Upload' option has a 'Parcourir...' button. At the bottom are 'Add' and 'Cancel' buttons.

The list of the topics available in a forum is displayed in a table in the **Forum** tab.

The screenshot shows the 'Nuxeo Forum' page in the 'Forum' tab. It includes a 'Forum', 'Edit', 'Alerts', and 'History' tab bar. Below is a 'New topic' button and a table of topics.

	Topic	Last message	Nbr. of published posts	Nbr. of pending posts	Moderation
<input type="checkbox"/>	Nuxeo features		0	0	No

At the bottom of the table are buttons: 'Paste', 'Add to worklist', 'Copy', and 'Delete'.

Moderating a topic

When a user creates a topic, he or she decides if the topic is moderated or not. Moderation is a process that makes comments available to moderators only when they are created, until they approve or reject the pending comments. Approval is thus mandatory to make comments available for other forum users.

When a user creates a moderated topic, he appoints users to manage comments on the topic. Only these moderators can approve or reject pending comments.

Moderators can see if there are comments pending in the forum tab. The number of comments waiting for approval is indicated for each topic of the forum.

Nuxeo Forum

Forum
Edit
Alerts
History

+ New topic

	Topic	Last message	Nbr. of published posts	Nbr. of pending posts	Moderation
<input type="checkbox"/>	Nuxeo features?		0	1	Yes

Paste
Add to wishlist
Copy
Delete

Approving a comment

Approving a comment means to publish it in the thread and make it available for all forum users.

To approve a comment:

1. Open the topic that has pending comments.
The pending comments have the status "Waiting for approval".

Welcome - by jdoe 15:10 (**Waiting for approval**)

Welcome to the new Nuxeo features topic!

Delete | Approve | Reject

2. Click on the **Approve** link in the top right corner of the pending comment.
The comment's status is "Published". It is now available to all forum readers.

Welcome - by jdoe 15:10 (Published)

Welcome to the new Nuxeo features topic!

Reply | Delete

Add

Rejecting a comment

Rejecting a comment means that you make the comment permanently unavailable for forum users.

To reject a comment:

1. Open the topic that has pending comments.
The pending comments have the status "Waiting for approval".

Welcome - by jdoe 15:10 (Published)

Welcome to the new Nuxeo features topic!

Reply | Delete

Re:Welcome - by jsmith 15:56 (**Waiting for approval**)

Thanks

Delete | Approve | Reject

Add

2. Click on the **Reject** link in the top right corner of the pending comment.
The comment's status is "Rejected". It is now permanently unavailable.

Welcome - by jdoe 15:10 (Published)

Welcome to the new Nuxeo features topic!

Reply | Delete

Re:Welcome - by jsmith 15:56 (Rejected)

Thanks

Delete

Add

Deleting a comment

Only the comment's author and the topic moderators can delete comments.

To delete a comment in a topic:

1. Open the topic.
2. Click on the **Delete** link located in the top right corner of the comment to delete.
The comment is immediately and permanently deleted.

Deleting a topic




Deleting a topic means deleting its content as well.

When you delete a topic, it is definitively erased from the application.

To delete a topic:

1. In the **Forum** tab of the forum, select the topic you want to delete by checking the corresponding box.
2. Click on the **Delete** button.
A confirmation window pops up.
3. Click on the **OK** button.
The topic is moved to the forum's trash. Users can then [restore the topic](#) into the forum or [erase](#) the same way as a document in a workspace.

Related pages:

-  [Forums](#)
-  [Managing topics](#)
-  [Participating to a topic](#)

Participating to a topic

To participate to a topic, you can add comments in it. The other users will be able to answer your comment.


Adding a comment to a topic

You must have at least writing rights to add comments on a topic.

You can attach a file to your comment, that users will be able to consult. The attached file of a comment cannot be modified or removed afterwards.

To add a comment to a topic:

1. Click on the **Topic** tab of the topic.

 If the topic is empty, the form to add a comment is automatically displayed in the Topic tab.

2. Click on the **Add** button to display the form to add a comment.

Add a comment

Title *

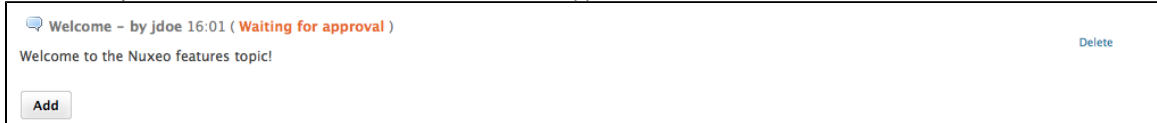
Comment *

Attach a file ☒ None ☐ Upload

3. Type the subject and the content of your comment.
4. Attach a file to your comment (this is optional).
5. Click on the **Add** button.
The comment is displayed in the **Topic** tab.
 - If the topic is not moderated, the comment has the status "Published" and all the users with access rights to the forum can read it.



- If the topic is moderated, the comment has the status "Waiting for approval" and is not available in the topic. A moderator is notified that you added a comment and he or she needs to approve it so that the comment becomes available for all forum users.



If you are the moderator of the topic, your comment is automatically published.

Replying to a comment

You must have at least writing rights to reply to comments in a topic.

When a comment has been added, you can reply to it. The answer is inserted right after the comment it replies to.




To reply to a comment:

1. In the **Topic** tab, click on the **Reply** link displayed top right corner of the comment you want to reply to.
The reply form is displayed under the comment.
2. Fill in the form.
3. Click on the **Add** button.
The reply is inserted after the comment it replies to.



- If the topic is not moderated, the reply has the status "Published" and all the users with access rights to the forum can read it.
- If the topic is moderated, the reply has the status "Waiting for approval" and is not available in the topic. A moderator is notified that you added a reply and he or she needs to approve it so that the reply is available for all forum users.
If you are the moderator of the topic, your reply is automatically published.

Related pages:

-  [Forums](#)
-  [Managing topics](#)
-  [Participating to a topic](#)

Pictures

Pictures are usually created in a picture book, a folder adapted to pictures, that enables you to view your pictures in a slideshow, for instance. But they can be used in regular folders and in workspaces directly.

In Nuxeo DM, pictures (created in a picture book, in a workspace or in a folder) have some specific features available:

- rotation
- picture specific metadata extraction
- different size presentation

On this page

- [Managing picture books](#)
 - [Creating a picture book](#)
 - [Editing a picture book](#)
 - [Viewing the content of a picture book](#)
- [Managing pictures](#)

Managing picture books

Picture books are folders adapted to hold only pictures. As so, you have some specific parameters that you need to fill in when you create a picture book.

A picture book can only hold pictures and other picture books.

Creating a picture book

You need to have at least Write right to be able to create a picture book.

To create a picture book:

The page Create content could not be found.

Picture book creation parameters

Field	Description
Title	Name of the picture book
Description	What the picture book is about
Slideshow duration	Time in seconds during which each picture of the pictures in the book will be displayed during the slideshow
Views	<p>Different views and formats available for the pictures available in the picture book.</p> <p>Default views available are:</p> <ul style="list-style-type: none"> • Thumbnail: view used for the default picture book content view, • Medium: intermediate size picture, • Original: original size picture, • OriginalJpeg: original size picture in .jpg format.

Editing a picture book

You need to have at least Write right to edit a picture book.

When you edit a picture book, you edit some of its properties: title, description and slideshow duration. You cannot edit the picture views available in the picture book.

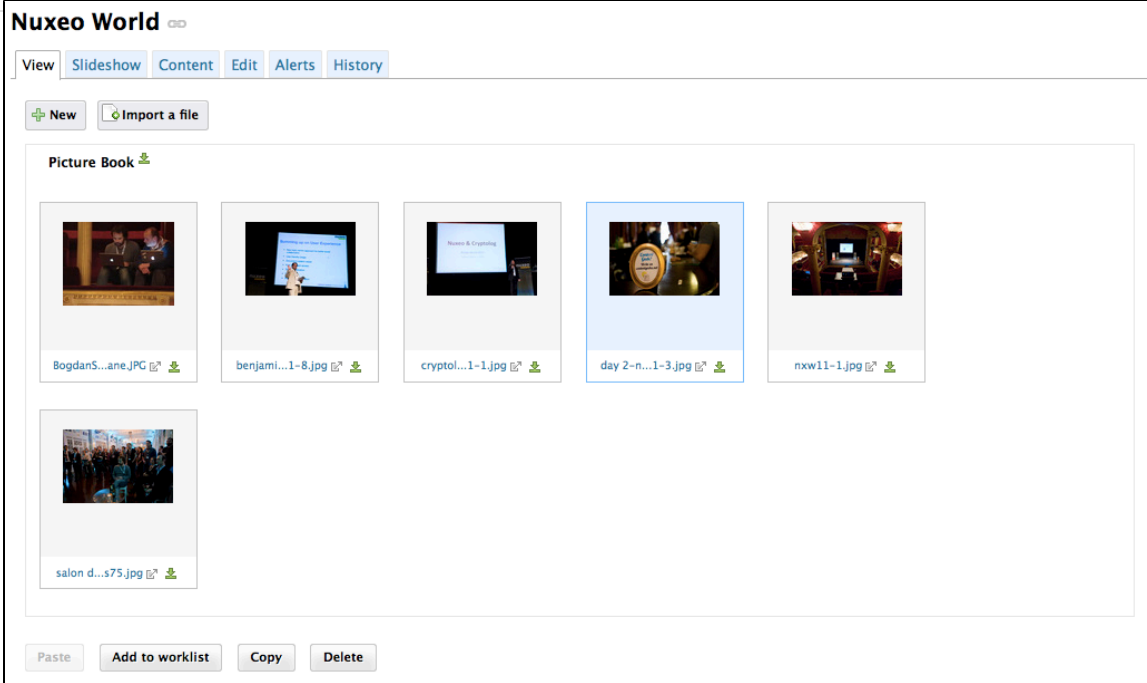
To edit a picture book:

1. Click on the **Edit** tab of the picture book.
 2. Edit the edition form's fields.
 3. Optionally type a comment to keep track of why you edited the picture book.
 4. Click on the **Save** button.
- Modifications are saved and the fact that you edited the picture book is tracked in **History** tab.

Viewing the content of a picture book

Beside the **Content** tab that enable the same features as in a workspace or a folder (selection of documents), a picture book has a **View** tab displays the book's content as thumbnails. It is the picture book's default tab. However, the regular **Content** tab used on all folderish content is available on picture book as well, to make it easy to have a synthetic view of the pictures author, versions, ect.

In the **View** tab of the picture book, click once on a picture to select it (keep CTRL touch pressed if you want to select several pictures) and click twice on it to consult it. Selected pictures are displayed on an orange background.



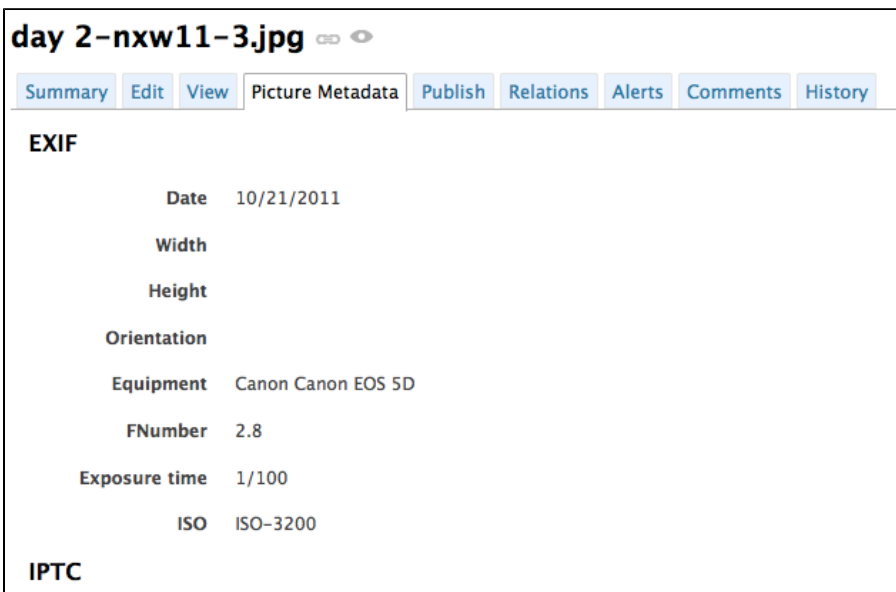
A **Slideshow** tab is also available on picture books, in which the pictures are displayed in a slideshow.

Managing pictures

Pictures can be created in picture book, in folders and in workspaces. You can add pictures using all document creation means:

- **New** button
- **Import a file** button
- Drag&Drop.

When pictures are created, the EXIF and IPTC metadata of the pictures are automatically extracted. You can consult them in the **Picture metadata** tab. EXIF and IPTC metadata are not editable.



When they are created, pictures are displayed in the **View** tab, that enables some picture management specific actions. Should the picture be wrongly oriented, you can rotate it using the right and left rotation buttons available on this tab. It is in this tab that you can see the different sizes available for the picture (sizes available are defined for the whole picture book) and download it in the format you need. Default size is medium size.

day 2-nxw11-3.jpg

Summary

Edit

View

Picture Metadata


Publish

Relations

Alerts

Comments

History



State

Project

Version

0.0

This document is **unlocked** | [Lock](#)

[Add to worklist](#)

Associated tags

[Add tags](#)

Content

Main File

day 2-nxw11-3.jpg (486 kB)

Whatever the folder they have been created in, their behaviour and the actions available are the same: you will be able to [preview](#) and [annotate](#) them, [link](#) them to other documents, [tag](#) them, [publish](#) them and subscribe to [email alerts](#). Note that workflow is not available on pictures.

Websites and blogs

[Websites](#) and [Blogs](#) are collaborative documents that are web publishing oriented. As so, they have a second interface that makes it easy to display the documents of a workspace to the public. These specific presentations are built using [Nuxeo WebEngine](#).

Websites and blogs have in common some specific behaviours, like the fact that they have some specific access rights and that comments can be moderated.

nuxeo

Ballet Fan

Open Source ECM

Search

Welcome on my blog, where I will post reports on all the ballets I see.

I am a big fan of the Paris Opera Ballet, which is the company I see most often.

Last Blog Posts

Wednesday 29 September 2010

jdoe

Roland Petit evening at the Paris Opera

Report on the show of sept. 28

Here are my impressions on last night show at the Garnier Opera, dedicated to the choreographer Roland Petit.

Roland Petit (born in 1924) is a French choreographer who trained at the Paris Opera Ballet school and created many creative ballets. He is the son of Rose Repetto, the founder of the the world-known ballet shoe company.

The evening was composed of 3 short pieces by Roland Petit:

- Le Rendez-Vous
- Le Loup
- Le Jeune Homme et la Mort

Contextual links

[Paris Opera website](#)

[New York City Ballet website](#)

[San Fransisco Ballet website](#)

Create entry

Blog Archive

2010(1)

September(1)

July(2)

June(6)

Blogs

Along with websites, Nuxeo DM includes blogs. Like websites, blogs are documents that make it easy to display your comments and documents, in reverse-chronological order. And like websites, they are available via a WebEngine interface, that takes into account all the characteristics of a blog.

Ballet Fan
Open Source ECM

Welcome on my blog, where I will post reports on all the ballets I see.
I am a big fan of the Paris Opera Ballet, which is the company I see most often.

Last Blog Posts

Wednesday 29 September 2010 jdoe

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Report on the show of sept. 28

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- Le Rendez-Vous
- Le Loup
- Le Jeune Homme et la Mort

Contextual links

- [Paris Opera website](#)
- [New York City Ballet website](#)
- [San Fransisco Ballet website](#)

Blog Archive

- 2010(1)
 - September(1)
 - July(2)
 - June(6)

Blogs are accessible by a URL formed like <http://server:8080/nuxeo/site/blogs/blog-name>. A shortcut is also available from the top right corner of the blog's "Summary" tab in Nuxeo DM interface (blog back-office).

Ballet fan

Content Edit Preview Alerts History

Ballet fan

<input type="checkbox"/>	Title	Modified	Author	Version	State
<input type="checkbox"/>	New York City Ballet website	9/29/10 4:11 PM	John Doe		Project
<input type="checkbox"/>	Paris Opera website	9/29/10 4:10 PM	John Doe		Project
<input type="checkbox"/>	Roland Petit evening at the Paris Opera	9/29/10 4:07 PM	John Doe		Project

On this page

- Creating a blog
- Adding content to your blog
 - Adding a blog post
 - Adding a contextual link

Creating a blog

Blogs can be created in workspaces only. You just need to have "Write" right to be able to create a new blog.

To create a blog:

The page Create content could not be found.

Blog parameters

Field	Description
Blog name	Type the name of your blog. This name will be displayed on top of all blog's pages.
Baseline	Type a brief description or catchphrase for your blog. This baseline will be displayed on all pages below the blog's name.
Email	Type the webmaster's email address. This address will be used for the contact link.
Logo	Default logo is Nuxeo's. You can upload the logo of your choice to replace Nuxeo's logo with one adapted to your blog's subject.
Welcome text	Type a text that will be displayed on the home page of your blog.

Welcome Animation/Image	You can add a SWF animation or a picture on your blog's home page.	
Captcha	Check the box you want users to type letters or digits from a distorted image displayed on forms, to secure content creation on your blog.	
Moderation Type	Select if comments posted on your blog should be should be approved to become visible by users (beforehand moderation) or if they are published immediately (afterwards moderation).	

Adding content to your blog

In a blog, you can create blog posts and contextual links.

Adding a blog post

Blog posts are all created at the root of the blog. They are then automatically sorted by creation date in the left menu of the blog.

You need "Write" permission to be able to create blog posts. You can create them from the blog's back-office (DM's interface) or from the blog's interface.

To create a blog post:

1. From the blog's homepage, click on the button **Create entry**.
2. Fill in the creation form:
 - Title: type the name of your post.
 - Description: type a text describing what the post is about.
 - Content: type the content of your post in the editor.
3. Click on the button **Save**
The post is immediately created and displayed. It is also displayed in the last blog posts.

Adding a contextual link

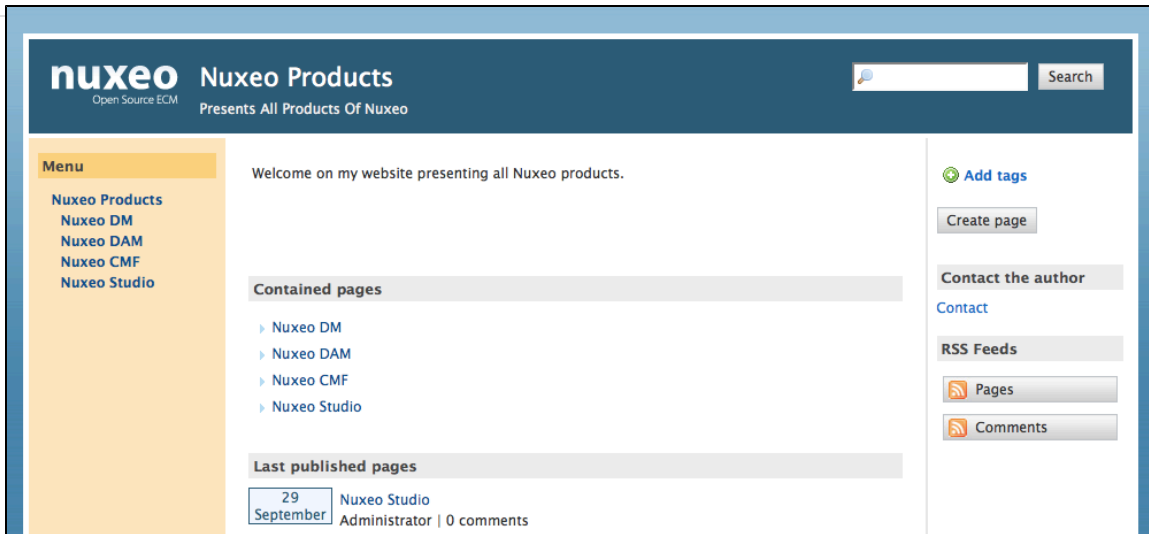
Contextual links are links displayed on the blog's home page.
They can be added from the blog's back-office only.

To add a contextual link:

1. On the **Content** tab of the blog from the back-office interface, click on the **New** button.
2. On the modal window displayed, click on **Contextual link**.
3. Fill in the creation form:
 - Title: type the text on which the user will click to open the link.
 - Description: type an optional text describing why you add this link. The description is displayed on the blog's interface.
 - Link: type the URL of the link.
4. Click on the button **Create**.
The link is created and its **Summary** tab is displayed.
In the blog's interface, the link is displayed in the right column.

Websites

Websites are documents in which you can publish webpages and contextual links. To make it even easier to display your documents, they have a specific presentation, rendered using [Nuxeo WebEngine](#).



The creation of a website takes place in workspaces, in the regular Nuxeo DM interface. Content creation, edition and commenting will preferably take place in Nuxeo WebEngine interface. Website management will however take place in Nuxeo DM's interface, which is considered as the website's back-office.

Websites are accessible by a URL formed like <http://server:8080/nuxeo/site/sites/site-name>. A shortcut is also available from the top right corner of the website's "Summary" tab in Nuxeo DM interface (website back-office).

Nuxeo Products

Content
Edit
Preview
Alerts
History
Manage

New
Import a file

Nuxeo Products

	Title	Modified	Author	Version	State
<input type="checkbox"/>	Nuxeo CMF	9/29/10 11:53 AM	Administrator		Project
<input type="checkbox"/>	Nuxeo DAM	9/29/10 11:53 AM	Administrator		Project
<input type="checkbox"/>	Nuxeo DM	9/29/10 11:52 AM	Administrator		Project
<input type="checkbox"/>	Nuxeo Studio	9/29/10 11:53 AM	Administrator		Project

Paste
Add to worklist
Copy
Delete

RSS
ATOM

On this page

- Creating a website
- Adding content to a website
 - Adding a webpage
 - Adding a contextual link
- Managing the access to the website

Creating a website

Websites can be created in workspaces only. You just need to have "Write" right to be able to create a new website.

To create a website:

The page Create content could not be found.

Website parameters

Field	Description
Site name	Type the name of your website. This name will be displayed on top of all website's pages.
Baseline	Type a brief description or catchphrase for your website. This baseline will be displayed on all webpages below the site's name.

Email	Type the webmaster's email address. This address will be used for the contact link.
Logo	Default logo is Nuxeo's. You can upload the logo of your choice to replace Nuxeo's logo with one adapted to your website's subject.
Welcome Text	Type a text that will be displayed on the home page of your website.
Welcome Animation/Image	You can add a swf animation or a picture on your website's home page.
Captcha	Check the box your you want users to type letters or digits from a distorted image displayed on forms, to secure content creation on your website.
Moderation Type	Select if comments posted on your website should be should be approved to be visible by user (beforehand moderation) or if they are published immediately (afterwards moderation).

Adding content to a website

In a website, you can create pages and contextual links.

Adding a webpage

Webpages can be created at the root of a website or in another page. You can create pages from Nuxeo DM's interface (which would be considered as the back-office of the website) or from the website interface.

To create a webpage:

1. In the website interface, click on the button **Create page** located in the right column.
2. Fill in the creation form:
 - Title: give your page a title
 - Description: type an optional text describing what the page is about.
 - Select the format used to present the content of the page and type the text in the editor displayed below.
 - Display this page in the webview menu: Select if you want the page to be displayed in the website menu.
3. Click on the button **Save**.
The page is created and displayed.

Adding a contextual link

Contextual links are links that are displayed from a webpage, in the right column of the website. Contextual links can only be created from the website's back-office, at the root of the application.

To create a contextual link:

1. On the **Content** tab of the website from the back-office interface, click on the **New** button.
2. On the modal window displayed, click on **Contextual link**.
3. Fill in the creation form:
 - Title: type the text on which the user will click to open the link.
 - Description: type an optional text describing why you add this link. The description is displayed on the website's interface.
 - Link: type the URL of the link.
4. Click on the button **Create**.
The link is created and its **Summary** tab is displayed.
In the website interface, the link is displayed in the right column.

Managing the access to the website

In a website, access rights can be managed on the website itself and on the webpages. The steps to grant or refuse access rights are the same as on a workspace or a folder (see [Managing access rights](#)).

However, websites have specific access rights:

- Comment
- Moderate

In a website, users with "Read" write cannot comment on pages unless they are explicitly give the right to comment. If beforehand moderation is applied to the website, then users with "moderate" rights will have to approve comments so that they can be viewed by other users.



Users with "Write" permission can comment on pages. Comments are still submitted to moderation.

Users with "Manage everything" permission are automatically moderators.

Email folders

Email folders are folders in which you can fetch emails to store and share them in your Nuxeo DM application.

The email folder is not intended to be a webmail. It will fetch the unread emails on your email server when you manually trigger the fetch from Nuxeo DM interface.

When emails are imported in Nuxeo DM, some metadata are automatically extracted from the email:

- Subject
- Sender
- Sending date
- Recipients
- CC Recipients
- Text: content of the email
- Attachments



The emails imported in the email folder cannot be modified in Nuxeo DM.

Creating an email folder

To create an email folder

1. In a workspace, click on the **New** button.
2. In the modal window displayed, click on **Email folder**
The email folder creation form is displayed.
3. Fill in the creation form (see parameters below) and click on the **OK** button.
The **Content** tab of the email folder is displayed.

You can now fetch emails.

Email folder parameters

Field	Description
Title	Name of your email folder
Email	Email address of the account from which the emails will be fetched.
Password	Password of the email account from which the emails will be fetched.
Protocol	Select the receive protocol used for the email account.
Host	Type the name of the host of the email account.
Port	Type the port number.\ Default value is 993, which should be ok in most cases. Check with your administrator if this value should be changed.
Socket factory fallback	Default value is set to "Yes". This parameter sets the behaviour in case the socket used to connect Nuxeo DM server to the email server fails to be created using the implemented socket factory.
Socket factory port	Port used to connect Nuxeo DM server to the email server. Default value is set to 993.
Start TLS (IMAP)	Default value is set to "Yes" to secure exchanges with the email server.
SSL protocols (IMAP)	Default value is "SSL". You can add other protocols, separated by whitespace.

Limit of new fetched emails

Indicate the maximum number of emails to be fetched at the same time.

The actions available on an email folder are:

- Edit the folder (see parameters above),
- Subscribe to [alerts](#),
- [Manage the access](#) to the folder,
- [Manage the trash](#) of the folder.

Fetching emails

To fetch emails:

1. In your email client, mark the emails you want to fetch as unread.
2. In Nuxeo DM, open the email folder.
The **Content** tab is displayed.
3. Click on the **Check email** button.

The unread emails are imported in the email folders.

Project A Official Emails

Content Edit Alerts History Manage

Check email

1/4

Subject: [Re: Mockups](#)
 Sending date: 1/12/2012 6:59 PM
 From: [John Smith](#) To: [John Doe](#)
 Hi John, Thanks for the mockups. Here are some comments. On the anonymous screen, I'm n...

Subject: [Mockups](#)
 Sending date: 1/9/2012 12:41 PM
 From: [John Doe](#) To: [John Smith](#)
 Hello John, Here are the mockups provided by the client for the new feature. Let me know if y...

Attachments

- Screen-anonymous.png (0 B)
- Screen-logged-in-user.png (0 B)
- Creation-form.png (0 B)
- Edition-form.png (0 B)

4. To open a mail, click on its subject.

Mockups

Summary Alerts Comments History Manage

Content

Attachments

- Screen-anonymous.png (40 kB)
- Screen-logged-in-user.png (21 kB)
- Creation-form.png (15 kB)
- Edition-form.png (22 kB)

Metadata

Subject: Mockups
 Sender: John Doe <jdoe@mycompany.com>
 Sending date: 1/9/2012 12:41 PM
 Recipients: John Smith <jsmith@mycompany.com>
 CC recipients:

State: In progress Version: 1.1+

This document is **unlocked** | [Lock](#)

[Add to wishlist](#)

Associated tags

[Add tags](#)

Emails cannot be edited, but you can [comment](#) and [annotate](#) them, [link](#) them to other documents and subscribe to [alerts](#).

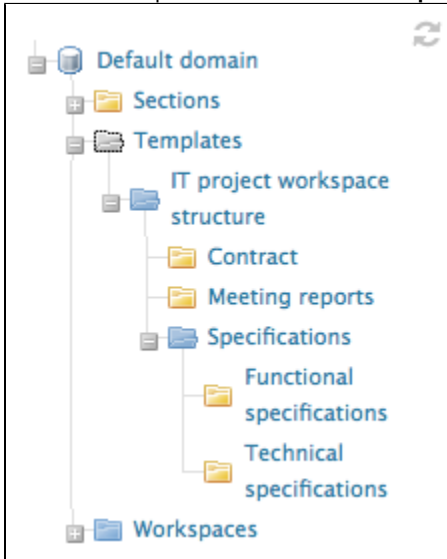
Using Workspace Templates

Templates are the easiest way to automate the creation of workspace tree structures. This is useful in many cases, for example when:

- you have many workspaces to create and want them to follow a certain structure of Folders, Files, or any type of documents (Forum, Blog, etc).
- you want to keep a consistency among different workspaces that users will create. For example, you may want each team's workspace to have a mail folder, a "projects" workspace, etc.

To create a template:

1. Click on the left panel of Nuxeo DM on **Templates**.



2. From there, you can create a new Template containing any type of document, and even files, with the tree structure you want.
3. Once a new Template has been created, you can [create many workspaces from this template](#).



Templates and User Rights Management

- When you set access rights on the 1st-level workspace of a template - here mySampleStructure-, it will be inherited in the new workspaces. For example, a user who is not allowed to read "mySampleStructure" will not be able to see it when creating a workspace.
- When you set access rights on the content of a workspace in a template, it won't be inherited in the new workspaces. For example, a user who can't read a folder like "SampleFolder" in a workspace but have reading access on the 1st-level workspace, will be allowed to see "SampleFolder"
In a few words, don't try to manage workspaces' access rights with Templates (this can be done other ways, like using [Studio c](#) onfiguration tool).

Exporting documents

Users can export documents on their computer. It is possible to export:

- one document at a time,
- a selection of documents,
- an entire workspace, folder, section.

There are several types of export:

- the **zip export** enables users to get a zipped folder with the documents' main attachment (.pdf, .doc files);
- the **XML export** is a low level export that enables users to either get the XML definition of the document or get a folder for each exported document that contains:
 - a document.xml file holding the document's metadata and various information such as the applied access rights,
 - a .blob file that holds the binary content of the document. This blob is referenced in the document.xml file;
- the **PDF export** enables users to have a view of the main information on the document;
- the **Excel export** enables users to save the table that displays the content of a workspace or content.

Export is available from:

- the worklist
- the Export options page, available by clicking the icon  below the search box.

On this page

- Exporting attachments
 - Exporting a document's attachments
 - Exporting the attachments of a document selection
 - Exporting the content of a workspace
- Exporting the list of documents a folder
- Low-level exports
 - XML export of a single document
 - XML export of a document selection
 - XML export of a folder


Exporting attachments

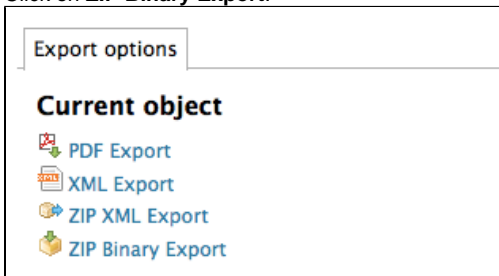
Users can easily export the attachments of a document or of a selection of documents, i.e. their main file and the additional attachments added from the **Files** tab of the documents.

Exporting a document's attachments

When you are on a document and you want to get its attached files, you can export them in a zipped folder.

To export the attachments of a document:

1. From the document, click on the icon  to see the export options.
2. Click on **ZIP Binary Export**.



You are proposed to save a "clipboard.zip" file on your computer.

3. Save it.
When you unzip it, you get the document's attachments and an INDEX.txt file that summarizes the content of the export.

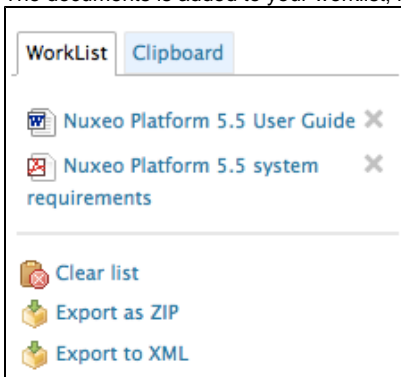
Exporting the attachments of a document selection

You can export the attachments of several documents at the same time, using the worklist.

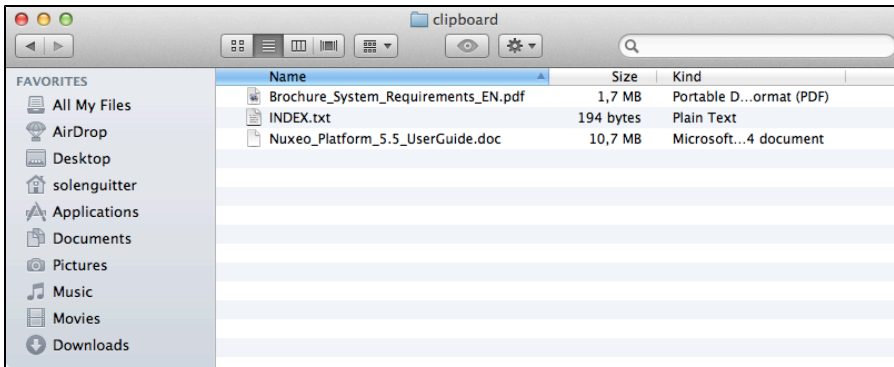
To export a selection of documents:

1. Check the box that corresponds to the documents to export to select it.
2. Click on the **Add to worklist** button.

The documents is added to your worklist, in the left part of the screen.




3. Optionally go in other folders and add other documents to your worklist.
4. In the worklist, click on the **Export as ZIP** link.
5. Save the "Clipboard.zip" folder.
When you unzip it, you get the documents' attachments and an INDEX.txt file that summarizes the content of the export.

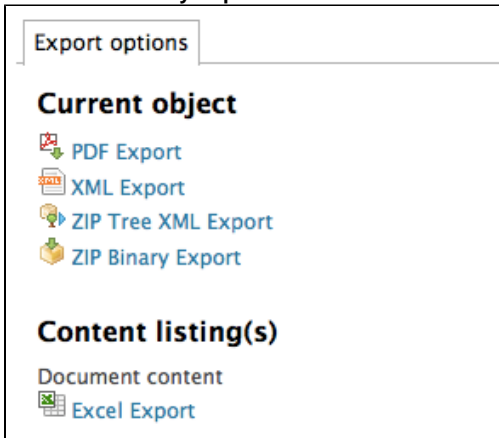


Exporting the content of a workspace

Just like you can export a selection of documents, you can easily export the content of a workspace, folder, section. In that case, the zipped folder you get recreates the structure of the exported space: workspaces and folders are exported as folders, in which you have the documents' attachments.

To export the content of a workspace:

1. From the workspace, folder or section, click on the icon  to see the export options.
2. Click on **ZIP Binary Export**.



You are proposed to save a "clipboard.zip" file on your computer.


3. Save it.
When you unzip it, you get a folder that represents the Nuxeo space structure and documents' attachments and an INDEX.txt file that summarizes the content structure of the export.

Exporting the list of documents a folder

Just like it is possible to [export search results](#), it is possible to export the list of documents in a workspace, section or folder. You can either use the Excel or the PDF export:

- the Excel export enables you to get the list of documents inside the folder in an Excel table,
- the PDF export enables you to get the folder metadata and history in addition to the list of documents.


To export the list of documents of a space in an Excel file:

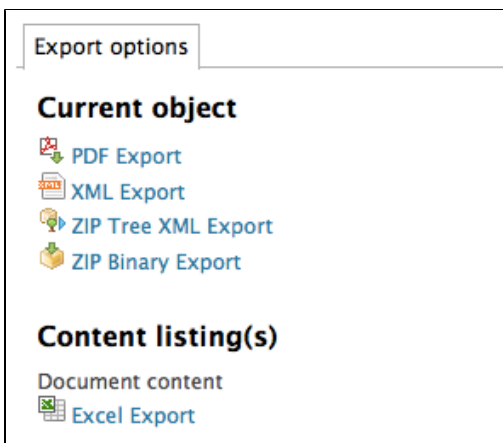
Click on the icon  displayed in the top right corner of the **Content** tab of the workspace, folder or section. You are proposed to save a "document_content.xls" file, that displays the same information on the folder's documents as in the **Content** tab.



The Excel export is also available from the **Export options** page, by clicking the icon .

To export the list of documents of a space in an PDF file:

1. From the workspace, folder or section, click on the icon  to see the export options.
2. Click on **PDF Export**.



The PDF view of the page opens in a new tab. It displays:

- the metadata of the folder,
- its history,
- its content list.

Low-level exports

XML export is a low level that enables users to get a set of information on documents in an XML file. This export type is useful for debugging, and as such, is mainly intended to administrators. You can export:


- a single document,
- a selection of documents,
- the structure of a folder.

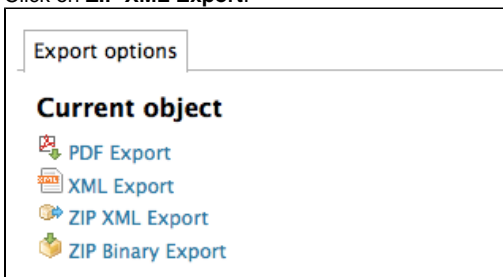
XML export of a single document

The XML export of a document enables users to get a folder for the exported document that contains:

- a document.xml file holding the document's various information (the applied access rights, the document's metadata, its path),
- a .blob file that holds the binary content of the document. This blob is referenced in the document.xml file.

To get the XML export of a document:

1. From the document, click on the icon  to see the export options.
2. Click on **ZIP XML Export**.

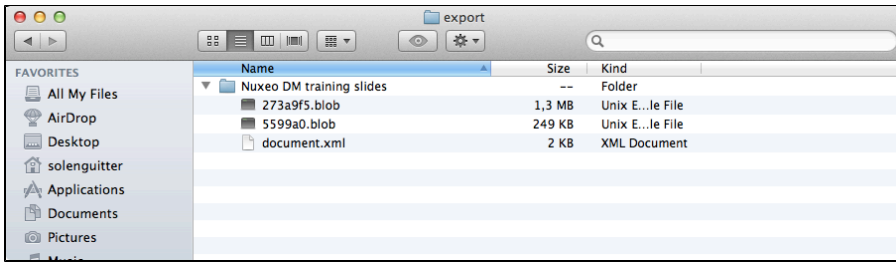


You are proposed to save a "export.zip" file on your computer.



If you're only interested in the XML file of the document, click on **XML Export**. The XML file should open in a new tab or window (depending on your browser's preferences).

3. Save the "export.zip" file.
When you unzip it, you get a folder named from the document, that contains a document.xml file and .blob for each attachment of the document.



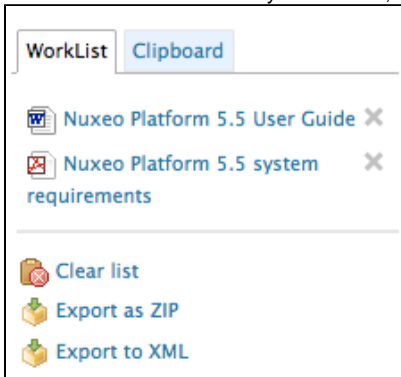
XML export of a document selection

It is possible to do an XML export of several documents in a single export, using the Worklist.

To export a selection of documents:

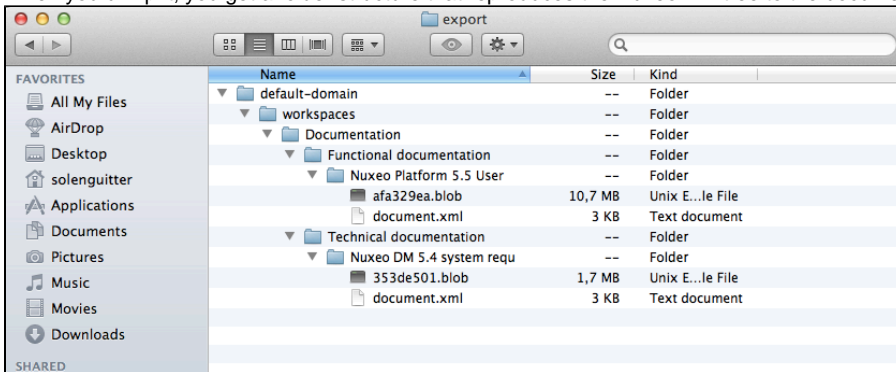
1. Check the box that corresponds to the documents to export to select it.
2. Click on the **Add to worklist** button.

The documents is added to your worklist, in the left part of the screen.



3. Optionally go in other folders and add other documents to your worklist.
4. In the worklist, click on the **Export to XML** link.
5. Save the "export.zip" folder.


When you unzip it, you get a folder structure that reproduces the Nuxeo DM tree to the document.

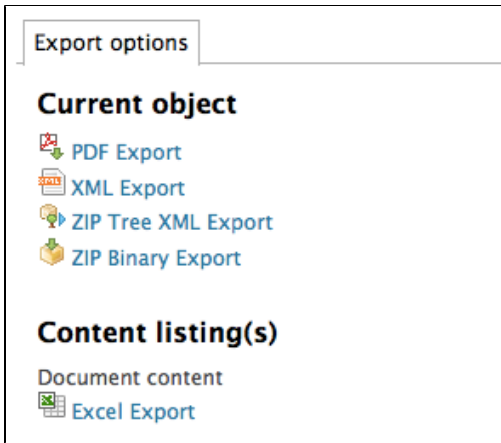


XML export of a folder

It is possible to export a whole workspace, section or folder in a zipped XML folder. This specific export enables users to import the folder back, with the same access rights definition.

To get the XML export of a folder:

1. From the folder (or workspace or section), click on the icon  to see the export options.
2. Click on **ZIP Tree XML Export**.



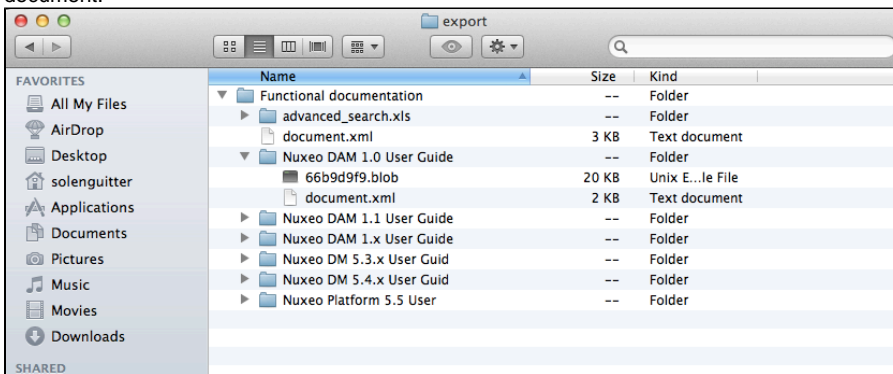
You are proposed to save a "export.zip" file on your computer.



If you're only interested in the XML definition of the folder, click on **XML Export**. The XML file should open in a new tab or window (depending on your browser's preferences).

3. Save the "export.zip" file.

When you unzip it, you get a folder named from the document, that contains a document.xml file and .blob for each attachment of the document.



Working in sections

When a document is finished and ready for distribution, you must publish it in a section. Sections are spaces dedicated to the distribution of documents to a wider audience.

Sections are spaces that are managed like workspaces. Like for workspaces, there is no section that is automatically created by default, except for the sections root. You are free to organize your section the way it fits your needs or your project the best. The section tree is completely independent from workspaces. Their structure is not linked. Still, you can guide users as to where they should publish documents from a specific workspace using the [publication targets](#).

As in workspaces, the access to sections is determined by [access rights](#).

The main difference with workspaces is the fact that documents can't be edited in sections. The only actions available on published documents are:

- [relations actions](#),
- [annotation actions](#),
- [alerts](#).

Publishing a document means publishing the version of the document as it is at the time of publication. If you modify the document in the workspace once published, it is not modified in the section. Published documents are for consultation only and cannot be modified. If you want to modify a published document, you must modify it in the workspace and then publish the modified version of the document.

When you want to publish a document, you need to submit it to publishing. When the document is submitted to publication, the section's managers can approve the publication submission, that is to say publish the document, or reject it. In that last case, the document is not available in the section. However, it is still available in the workspace. You can modify it and submit it again.

Publishing documents

Publishing a document means publishing the version of the document as it is at the time of publication. If you modify the document in the workspace once published, it is not modified in the section. Published documents are for consultation only and cannot be modified. If you want to modify

a published document, you must modify it in the workspace and then publish the modified version of the document.

When you want to publish a document, you need to submit it to publishing. When the document is submitted to publication, the section's managers can approve the publication submission, that is to say publish the document, or reject it. In that last case, the document is not available in the section. However, it is still available in the workspace. You can modify it and submit it again.

On this page

- [Submitting a document to publishing](#)
- [Approving document publishing](#)
- [Rejecting document publishing](#)
- [Unpublishing documents](#)
 - [Related pages](#)

Submitting a document to publishing

Only users with writing or management rights in the workspace can submit a document to publication.

You can submit a document in several sections. The publishing workflows in the different sections are independent. The document can be published in a section and rejected in another one. The list of the sections in which you can publish a document is defined by your access rights. You can submit a document in sections in which you have at least reading rights.

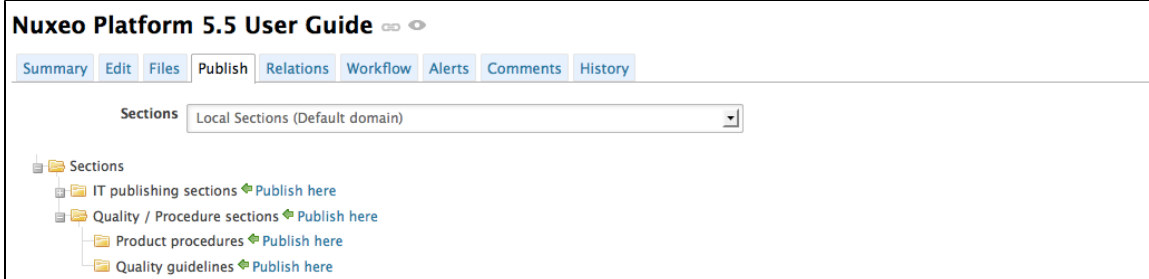
To submit a document to publishing:

1. In the workspace, open the document to publish.
2. Click on the **Publish** tab.
3. Use the drop down list to select the domain you want to publish the document in.

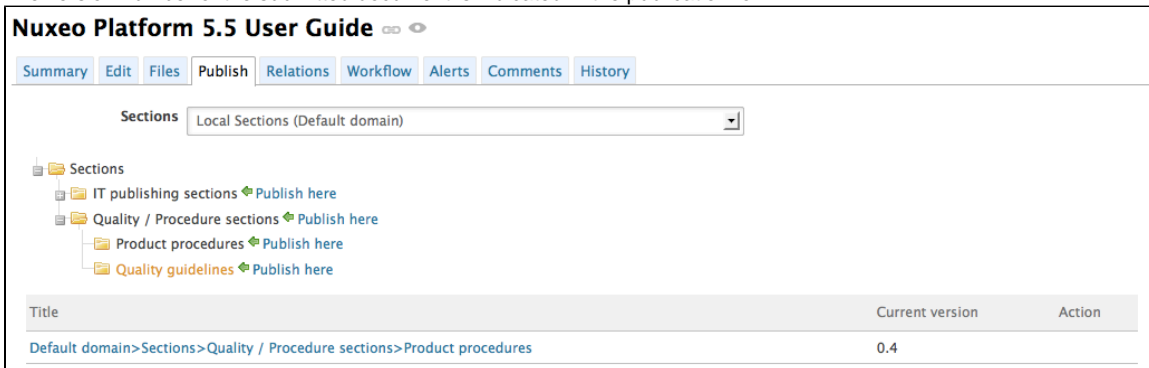


If you use only the default domain, the domain is selected by default.

4. Unfold the sections tree and click on the **Publish here** link corresponding to the section you want to publish the document in.



The version number of the submitted document is indicated in the publication form.



The document is available in the section for users with management rights only. It is also displayed in their dashboard as a pending document. The document must be approved to be available to all section readers.



If you have management rights in the selected section, the document is automatically published. It doesn't need to be approved.

In the workspace, the document's minor version is automatically incremented.

Approving document publishing

Users with write and management rights in the section can approve the publishing of a document.

When a document is submitted to publication in a section in which you have management rights, it is displayed in your dashboard. You must then

approve or reject the document.

To publish a document:

1. Click on the **Dashboard** link in the top right corner of the window, to open your dashboard. The pending documents are displayed in your tasks.

The screenshot shows the Nuxeo Dashboard interface. The top navigation bar includes 'Home', 'Document Management', and a user profile 'sguitter'. A search bar is on the right. The left sidebar contains links for 'Dashboard', 'Profile', 'Notifications', 'Authorized Applications', and 'Users & groups'. The main content area is divided into several widgets: 'My Workspaces' (a table of documents), 'My Pending Requests' (a message stating no running workflows), and 'My Tasks' (a table of tasks). The 'My Tasks' table has columns for Task Name, Title, Directive, Comment, Due date, and Start Date. One task is listed: 'Publish document' with title 'Nuxeo Platform 5.5 User Guide', directive 'Publish document', and start date '01/23/2012 14:09'.

2. Click on the pending document. The document opens in the section on its **Summary** tab. It has a **Publishing** part that has a **Reject** and a **Publish** buttons.

The screenshot shows the 'Nuxeo Platform 5.5 User Guide' document page. The top navigation bar includes 'Summary', 'Relations', and 'Alerts'. The main content area is divided into several sections: 'Content' (showing the document file 'Nuxeo_Platform_5.5_UserGuide.doc (10 MB)'), 'Common metadata' (a table of metadata), 'Publication' (a section for publication approval), and 'Associated tags' (a section for adding tags). The 'Publication' section contains a message 'This document is waiting for a publication approval' and a 'Comment' field. Below the comment field are 'Approve' and 'Reject' buttons. The 'Associated tags' section has an 'Add tags' button. The bottom of the page shows the breadcrumb 'Default domain>Sections>Quality / Procedure sections>Product procedures' and the version '0.4'.

Only users with management rights can see the pending document in the section.

3. Type a comment (optional).
4. Click on the **Publish** button.

The document is now available to all the users who can access the section.

Product procedures

Content Edit Alerts History Manage

New Filter

Items/page 20

	Title	Modified	Last contributor	Version	State
	Nuxeo Platform 5.5 User Guide	1/18/2012	John Doe	0.4	Project

Delete Unpublish

Rejecting document publishing

Only users with write and management rights in the section can reject the publishing of a document.

When a document is submitted to publication in your section, you must decide if it can be published in it. If you think that the document is not ready for publication or that it shouldn't be published in this section, you must reject it.

Only users with write and management rights can see the pending document in the section.

To reject a document:

- Click on the **Dashboard** link in the top right corner of the window, to open you dashboard. The pending documents are displayed in your tasks.

nuxeo Home Document Management sguitter

Layout Add gadget Restore to default

Dashboard
Profile
Notifications
Authorized Applications
Users & groups

My Workspaces

Title	Last modified at	Author
Solen Gutter	12/14/2011 16:23	sguitter
Live Edit	01/04/2012 14:28	Administrator
Documentation	12/22/2011 17:08	jdoe
Marketing	12/23/2011 10:13	jdoe
Projects	12/23/2011 11:51	jdoe

My Documents

Title	Last modified at	Author
Nuxeo features	01/20/2012 15:08	sguitter

My Pending Requests

You don't currently manage any running workflows

My Tasks

Task Name	Title	Directive	Comment	Due date	Start Date
Publish document	Nuxeo Platform 5.5 User Guide	Publish document			01/23/2012 14:09

- Click on the pending document. The document opens in the section. It has a **Publishing** part that has a **Reject** and a **Publish** buttons.
- Type a comment explaining why you reject the document publication. This comment is mandatory to reject the document publishing.

Publication

This document is waiting for a publication approval

Comment *

This shouldn't be published in this section.

Approve Reject

- Click on the **Reject** button. The document is not published and is deleted from section content. You are redirected on the **Content** tab of the section. In the workspace, the fact that publishing was rejected is logged in the History of the document.

Nuxeo Platform 5.5 User Guide

Summary Edit Files Publish Relations Workflow Alerts Comments History

Event log Archived versions

Filter

Items/page 10

1/4

Performed action	Date	Username	Category	Directive	Due date	Comment	State
Publication rejected	1/23/2012 5:30 PM	John Smith	Document			Publication rejected in /default-domain/sections/Quality - Procedure sect/Quality guidelines (DefaultSectionsTree-default-domain) with comment -- This shouldn't be published in this section.	Project
Publication rejected	1/23/2012 5:30 PM	John Smith	Document			This shouldn't be published in this section.	Project
Publication waiting	1/23/2012 5:29 PM	John Doe	Document			Publication waiting in /default-domain/sections/Quality - Procedure sect/Quality guidelines (DefaultSectionsTree-default-domain)	Project

Unpublishing documents

Only users with writing or management rights can unpublish a document from a section.

When a document is obsolete or inaccurate, it shouldn't be available in sections anymore. You have to unpublish it so section readers do not have access to the document.

Unpublishing a document deletes the document from the section, but it does not delete the workspace document.

To unpublish a document from a section:

1. In the **Content** tab of the section, check the box in front of the document's name.

Product procedures

Content Edit Alerts History Manage

Filter

Items/page 20

<input type="checkbox"/>	Title	Modified	Last contributor	Version	State
<input checked="" type="checkbox"/>	Nuxeo Platform 5.5 User Guide	1/18/2012	John Doe	0.4	Project

RSS | ATOM

2. Click on the **Unpublish** button.
The document is unpublished and does not appear in the section. The original document in the workspace is not deleted.

Related pages

- [Publishing documents](#)
- [Setting publication targets](#)

Managing Nuxeo DM

Administrators can configure some elements directly from Nuxeo DM's user interface.

As an administrator, you are in charge of managing [users](#) in [groups](#). You can create news users and groups, edit their properties, or even delete users or groups.

You can also [manage vocabularies](#), i.e. the labels displayed in drop down lists.

At a space level, space managers are in charge of [managing access rights](#).

Managing access rights

Only users with management rights can manage the access rights of a space.

Managing access rights means granting or denying access rights in a space. The access rights management screen is available as a sub-tab in the **Manage** tab of the space.

The access rights management sub-tab is accessible composed of three parts:

Content
Edit
Manage

Access rights
Local configuration
Trash

Inherited rights

Type	Username	Granted permissions	Denied permissions
	Administrator	Manage everything	
	Members group	Read	

☐ Block permissions inheritance

Local rights

Type	Username	Granted permissions	Denied permissions
	John Doe	Manage everything Write	

Add a new security rule:

1. the **Inherited rights** part displays rights that were granted or denied in a parent space;
2. the **Local rights** part displays the rights that were granted or denied in the current space;
3. the form to grant or deny access rights in the current space.

On this page

- [Rights prioritization](#)
- [Granting access rights](#)
- [Denying access rights](#)
- [Removing a user from local rights](#)
- [Blocking rights inheritance](#)
 - [Want to add your own access rights?](#)

Rights prioritization

The access rights available are:

Right	Actions in workspaces	Actions in sections
Read	Consult content Comment documents Annotate documents Tag documents	Consult content Comment documents Annotate documents Tag documents + Can ask for publishing actions
Version	Manage the archived versions of a document (view, restore, delete) + Read actions	
Write	Create documents Edit documents Add / remove relations Start a workflow + Remove actions + Version actions + Read actions	Create sections Approve document publishing Unpublish documents + Read actions + Remove actions
Manage	Manage access rights Set alerts to other users Apply a preset look on documents Manage deleted documents + Write actions + Read actions	Manage access rights Set alerts to other users Apply a preset look on documents Manage deleted documents + Write actions + Read actions

Remove	Delete documents (this permission is included in Write right) <div> ✓ The Remove permission is most intended to be denied, so as to restrict the actions available to users with "Write" permission. </div>	Delete sub-sections (this permission is included in Write right) <div> ✓ The "Remove" permission is intended to be denied, so as to restrict the actions available to users with "Write" permission. </div>
Can ask for publishing		Submit documents for publishing (this permission is included in Read right) <div> ✓ The "Can ask for publishing" permission is intended to be denied, so as to restrict the actions available to users with "Read" permission, typically to enable users to see the content of a section without being able to publish in the section. </div>
Comment	Add comments on websites	
Moderate	Moderate comments on websites and blogs if moderation is set to "Beforehand".	

As you can see, some rights include more permissions than others, and sometimes include other rights. That's the case for "Write", that includes "Remove".

Beside the fact that some rights are stronger than others, you should be aware, when you set up rights on a space, that some rights have priority over others:

- local rights have priority over inherited rights,
 - granted rights have priority over denied rights.
- The fact that the rights are given or denied to a single user or a group doesn't have any influence.

Granting access rights

To grant access rights:

1. Click on the **Manage** tab of the space.
The **Access Rights** sub-tab is displayed.
2. In the form, type the username of the user you want to grant rights to.
To give access rights to a group, type the group's name.
The names of the users or groups corresponding to the typed characters are automatically displayed as you type.

3. Click on the user you want to give access rights to.
4. Select the right to grant in the **Permission** drop down list.

- Click on the **Add permission** button.
The user and its rights are displayed in the **Local Rights** part of the screen.

Type	Username	Granted permissions	Denied permissions
<input type="checkbox"/>	John Doe	Write	

Remove permission(s)

Save local rights

- Save local rights modification by clicking on the **Save local rights** button.
Local rights are saved and applied.

Denying access rights

If a user has inherited rights that you don't want him to have in the current space, you can deny him these rights. If you want to deny access rights to a large number of users, block rights inheritance and give access rights only to the users you want to be able to access the workspace or section.

To deny access rights:

- Click on the **Manage** tab of the space.
The **Access Rights** sub-tab is displayed.
- In the form, type the username of the user you want to grant rights to.
To deny access rights to a group, type the group's name.
The usernames corresponding to the typed characters are automatically displayed.

- Click on the user you want to deny rights to.
- Select the right to deny in the **Permission** drop down list.
- Click on the **Add permission** button.
The user is in the **Local rights** form. The denied rights is displayed in the **Denied permissions** column.

Type	Username	Granted permissions	Denied permissions
<input type="checkbox"/>	John Doe	Write	Remove

Remove permission(s)

Save local rights

- Save local rights modification by clicking on the **Save local rights** button.

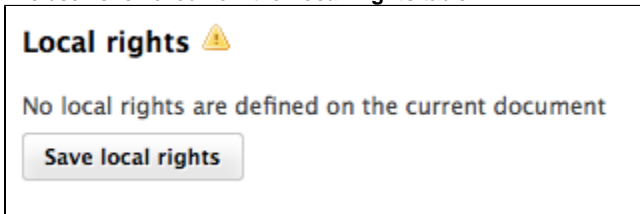
Local rights are saved and applied.

Removing a user from local rights

If you want to refuse rights to a user, and that these rights have been granted in the current space, you can remove the user from the local rights.

To remove a user from the local rights:

1. Click on the **Manage** tab of the space.
The **Access Rights** sub-tab is displayed.
2. In the **Local Rights** part of the screen, check the box corresponding to the user you want to remove.
3. Click on the **Remove permission(s)** button.
The user is removed from the **Local Rights** table.



4. Save local rights modification by clicking on the **Save local rights** button.
Local rights are saved and applied.

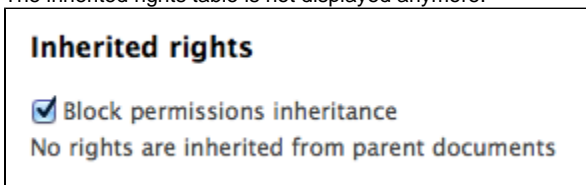
Blocking rights inheritance

The rights that are granted or denied in a space are applied to the space's content, including its sub-spaces. You thus have the same rights in the sub-spaces as in the parent space. That is called rights inheritance.

You can block this inheritance. It enables you to block the access of a sub-workspace to the workspace's users, for instance, or to deeply modify the access rights in the sub-workspace.

To block rights inheritance:

1. Click on the **Manage** tab of the space of which you want to the access rights.
The **Access Rights** sub-tab is displayed.
2. Check the box **Block permissions inheritance** located under the **Inherited Rights** table.
The inherited rights table is not displayed anymore.



You are added in the list of the local rights, like the administrators group.

Local rights			
<input type="checkbox"/>	Type	Username	Granted permissions
<input type="checkbox"/>		Administrators group	Manage everything
<input type="checkbox"/>		John Doe	Manage everything
<button>Remove permission(s)</button>			

In the **Access Rights** tab of the possible sub-spaces, a group Everyone is denied all rights.

Inherited rights			
Type	Username	Granted permissions	Denied permissions
	Administrators group	Manage everything	
	John Doe	Manage everything	
	Everyone		Manage everything
<input type="checkbox"/> Block permissions inheritance			

You can now grant access rights to users.

Want to add your own access rights?

No content found for label(s) permissions.

Managing groups

Groups of users can be created and their properties modified directly in the Nuxeo Platform. Groups of users are used to manage access rights more easily. Instead of giving (or denying) access rights to single users and repeat the same operations several times, you can give several users the same right in one single manipulation by using a group.

There are two default groups in the Nuxeo Platform:

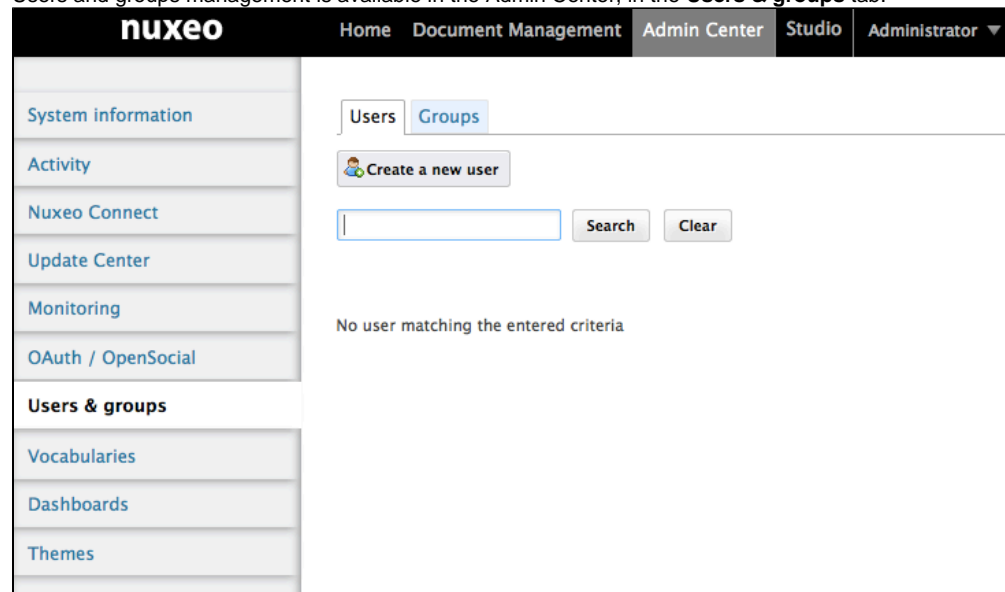
- *administrators*: the members of this group are administrators of the application. They can manage users, vocabularies and documents.
- *members*: the members of this group by default have reading rights on all the content of the application.

Groups can be composed of users and of sub-groups. Sub-group's members automatically become members of the parent group. Thus, they are granted all the access rights you give to the group.

On this page

- Groups parameters
- Creating a group
- Editing a group
- Deleting a group
 - Related pages
 - Want to customize groups?

Users and groups management is available in the Admin Center, in the **Users & groups** tab.



Groups parameters

Field	Description
Group name	The ID of the group. The ID cannot be modified.
Group label	The name of the group displayed to users.
Group's members	Users that belong to the group.
Sub-groups	Groups that belong to the group.

Creating a group

Only administrators can create groups of users.

To create a group of users:

1. Click on the **Admin Center** main tab, and then on the **Users & groups** tab.

- The directory opens on the **Users** tab.
2. Click on the **Groups** tab.
A search form and the list of the existing groups is displayed.
3. Click on the **Create a new Group** button.
4. Fill in the creation form.
5. Click on the **Save** button.
The **View** tab of the group's card is displayed.



If you need to create several groups, click on the **Save and create** button.
Your group is saved and the group creation form is displayed so you can immediately create another group.

Editing a group

Only administrators can modify groups.

Modifying groups most often consists in adding or removing members of the group. The name of the group cannot be changed.

members

← [Back to the list](#)

Delete

View **Edit**

Group label

Group's members **Search for users**

To start the search, please type at least 3 character(s)

✗ John Doe

✗ John Smith

✗ Marge White

✗ Clark Parker

Sub-groups **Search for groups**

To start the search, please type at least 3 character(s)

✗ Project Managers

✗ Redactors

Save

To edit a group:

1. Click on the **Admin Center** main tab, and then on the **Users & groups** tab.
The directory opens on the **Users** tab.
2. Click on the **Groups** tab.
A search form is displayed.
3. Search a group and click on its name to open its card.
The card displays the members and sub-groups of the group in the **View** tab.
4. Click on the **Edit** tab.
The modification form is displayed.
5. Modify the group's members and click on the **Save** button.
The **View** tab of the group is displayed with the modifications you just made.
The new group members are immediately granted the group's access rights. The users who are no longer members of the group are denied group's access rights. However they still have their individual access rights.

Deleting a group



Only administrators can delete groups.

To delete a group:


1. Click on the **Admin Center** main tab, and then on the **Users & groups** tab.
The directory opens on the **Users** tab.
2. Click on the **Groups** tab.
A search form is displayed.
3. Search the group to delete and click on its name to open its card.

- The card displays the members and sub-groups of the group in the **View** tab.
- 4. Click on the **Delete** button.
A window pops up.
- 5. Click on the **OK** button.
The group search form is displayed. The group is displayed and its members lose the group's access rights.

Related pages

-  [Managing users](#)
-  [Managing groups](#)


Want to customize groups?

-  [Add predefined users and groups \(Nuxeo Online Services\)](#)

Managing users

Only administrators can manage users and groups. They can create new users and groups, modify their properties or delete them. It is also possible to connect the Platform to an external directory (LDAP directory for instance). This procedure is explained in the technical documentation.

Users can only consult users and groups directories. Administrators can create, edit and delete users and groups.

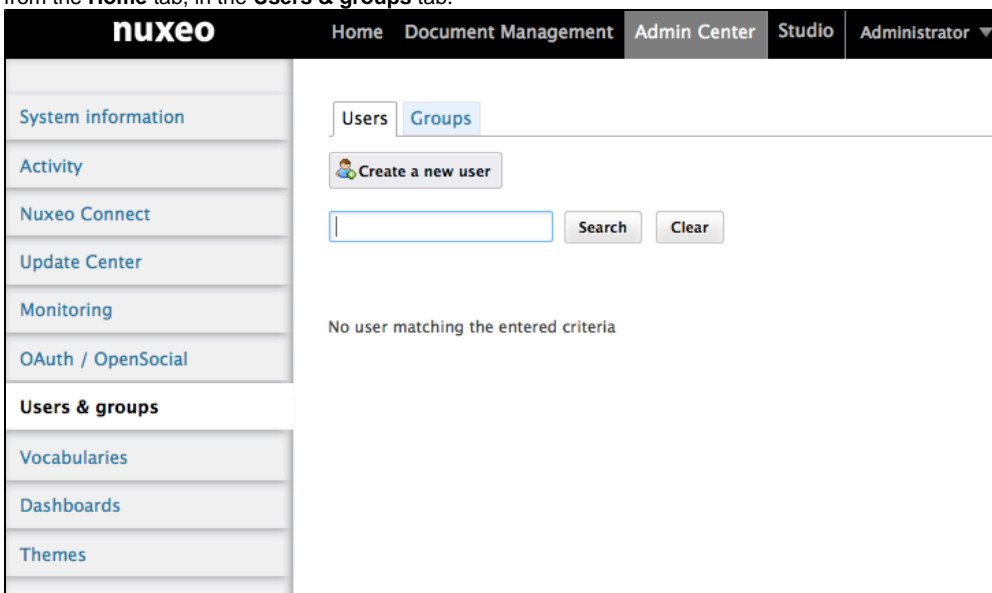
 When you use an external directory for users and groups, the actions available on users and groups are limited, even to administrators.

On this page

- [User's parameters](#)
- [Creating a user](#)
- [Editing a user's properties](#)
- [Changing a user's password](#)
- [Deleting a user](#)
 - [Related pages](#)
 - [Want to customize users?](#)

Users and groups management is available:

- from the **Admin Center**, in the **Users & groups** tab,
- from the **Home** tab, in the **Users & groups** tab.



User's parameters


Field	Description
Username	Name the user will use to log in.

First Name	First name of the user
Last Name	Last name of the user
Company	Company or organization of the user
Email	email of the user. This address is used for alerts.
Password	User's password
Password (Verify)	User's password
Groups for this user	Groups of which the user is a member. User must be at least in 'administrators' or 'members' group, or one of their sub-groups.
Virtual groups for this user	
Avatar	Image that represents the user in the application.
Birth date	User's birth date
Phone number	User's phone number
Gender	User's gender. Default value is Male.
Public profile	Visibility of the social collaboration information of the user. By default, profiles are public.

Creating a user

Only administrators can create new users.

By default, the Nuxeo Platform has one user, called Administrator. This user is the administrator. You must use this user to create new users and delegate them access rights.

 Users must be at least in "administrators" or "members" group, or one of their sub-groups to be able to access the application's content.

To create a user:

1. Click on the **Admin Center** main tab, and then on the **Users & groups** tab.
The members management interface opens on the user directory search form.
2. Click on the **Create a new user** button.
3. Fill in the user creation form.
Mandatory fields are indicated by a red asterisk.
4. Click on the **Save** button.
The card of the new user is displayed. You can modify its properties and its password.
The user can immediately connect to the Nuxeo application using his or her username and password.

jdoe

Delete

View
Edit
Change password

Username

jdoe

First name

John

Last name

Doe


Company

Nuxeo

Email

jdoe@nuxeo.com

Groups for this user

 members

Virtual groups for this user

Editing a user's properties

Only administrators can modify other users' properties. But every user can modify his own properties from the **Profile** tab of his [Home](#).

You cannot edit the username, as it is the ID of the user on the application.

The screenshot shows the user profile editing interface for a user named 'jdoe'. At the top, there is a 'Delete' button and three tabs: 'View' (selected), 'Edit', and 'Change password'. Below the tabs, the user's information is displayed in a form:

- Username:** jdoe
- First name:** John
- Last name:** Doe
- Company:** Nuxeo
- Email*:** jdoe@nuxeo.com
- Groups for this user:** Search for groups. Below this is a search input field with a red 'X' icon and the text 'To start the search, please type at least 3 character(s)'. To the right of the search field is a button with a person icon and the text 'members'.
- Virtual groups for this user:**

At the bottom left, there is a 'Save' button.

When you are using an external directory for users management, the **Edit** tab is not displayed as you cannot edit the users' properties (managed directly from the directory).

To modify a user's properties:

1. Click on the **Admin Center** main tab, and then on the **Users & groups** tab.
The members management interface opens on the user directory search form.
2. Search a user and click on the user's name to open his or her card.
The user's card is displayed.
3. Click on the **Edit** tab.
4. Modify the fields in the modification form.
5. Click on the **Save** button.
The **View** tab is displayed with your modifications.

Changing a user's password

Only administrators can modify other users' password. However every user can modify his or her own password.

When you use an external directory for users management, the **Change password** tab is not displayed as you cannot edit your password.

The screenshot shows the user profile editing interface for a user named 'jdoe', specifically the 'Change password' tab. At the top, there is a 'Delete' button and three tabs: 'View', 'Edit', and 'Change password' (selected). Below the tabs, the password change form is displayed:

- Password:** A text input field.
- Password (Verify):** A text input field.
- Virtual groups for this user:**

At the bottom left, there is a 'Save' button.

To modify a user's password:

1. Click on the **Admin Center** main tab, and then on the **Users & groups** tab.
The members management interface opens on the user directory search form.
2. Search a user and click on the user's name to open his or her card.
The user's card is displayed.
3. Click on the **Change password** tab.
4. Type the new password and confirm it.
5. Click on the **Save** button.
The **View** tab is displayed. The user must use his or her new password the next time he or she logs in.

Deleting a user

Only administrators can delete users.



Deleting a user is a permanent action.

To delete a user:

1. Click on the **Admin Center** main tab, and then on the **Users & groups** tab.
The members management interface opens on the user directory search form.
2. Search a user and click on the user's name to open his or her card.
The user's card is displayed.
3. Click on the **Delete** button.
A window pops up.
4. Click on the **OK** button.
The user is deleted. He or she cannot log in to the Nuxeo application.

Related pages



[Managing users](#)



[Managing groups](#)

Want to customize users?

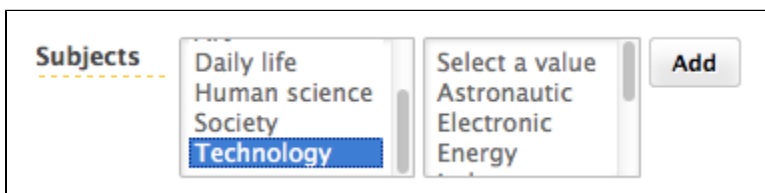


[Add predefined users and groups](#) (Nuxeo Online Services)

Managing vocabularies

Only administrators can consult and manage vocabularies.

Vocabularies are the lists of labels used in the application, for instance in drop down lists. A vocabulary is composed of several entries, that are the options in the drop down lists. Some vocabularies are hierarchical, i.e. they have several levels. For instance, the **Subjects** metadata uses a two level vocabulary. First level is **Topic**. Second level is **Subtopic** and each entry is linked to a **Topic** entry.



Functional administrators can only modify or delete vocabularies. They cannot create a new vocabulary from the user interface.

On this page

- [Consulting vocabularies](#)
- [Vocabulary entries parameters](#)
- [Editing vocabularies](#)
 - [Adding a new vocabulary entry](#)
 - [Editing a vocabulary entry](#)
 - [Deleting a vocabulary entry](#)
 - [Related pages](#)
 - [Want to know more about vocabularies configuration?](#)

Consulting vocabularies

All vocabularies editable from the user interface are listed in the vocabularies management interface.

Depending on the version of Nuxeo DM you use, you won't access the vocabularies the same way

To consult a vocabulary or its entries:

1. Click on the **Admin Center** main tab.
2. Click on the **Vocabularies** tab.

ID	Label	Obsolete	Order	Modify	Delete
afterRelationCreation	afterRelationCreation	No	320	Modify	Delete
afterRelationRemoval	afterRelationRemoval	No	360	Modify	Delete
annotationCreated	annotationCreated	No	400	Modify	Delete
annotationDeleted	annotationDeleted	No	380	Modify	Delete
Cancellation event	Cancellation event	No	340	Modify	Delete
documentCheckedIn	documentCheckedIn	No	150	Modify	Delete
documentCheckedOut	documentCheckedOut	No	140	Modify	Delete
documentCreated	documentCreated	No	0	Modify	Delete

The vocabularies drop down list is displayed. The first vocabulary's entries are displayed.

3. Select the vocabulary you want to consult in the drop down list.

The vocabulary entries are displayed.

ID	Label	Obsolete	Order	Modify	Delete
accomodationApplicationForm	label.directories.nature.accomodationApplicationForm	No	10,000,000	Modify	Delete
acknowledgement	label.directories.nature.acknowledgement	No	10,000,000	Modify	Delete
application	label.directories.nature.application	No	10,000,000	Modify	Delete
article	label.directories.nature.article	No	10,000,000	Modify	Delete

i By default, the labels of default vocabularies entries are the IDs of labels in properties files of source code.

Vocabulary entries parameters

Field	Description
ID	Unique identifier for the vocabulary entry. The ID is not displayed to users.
Parent	This field is only displayed on hierarchical vocabularies second level. It indicates to which 1st level entry the current value is linked.
Label	Value of the entry that will be displayed to users on the application.
Obsolescence	Indicates if the entry should be displayed in the available values on edition.
Order	Indicates the rank of the entry in the vocabulary. Order is set at "10,000,000" by default.

Editing vocabularies

When you modify a vocabulary, you can add new entries, edit or delete them.

Adding a new vocabulary entry

To add an entry to a vocabulary:

1. Consult the [vocabulary](#) to add an entry to.
2. Click on the **Add a new vocabulary entry** link.
The entry creation form is displayed under the link.
3. Fill in the entry creation form.

4. Click on the **Add** button.
The new entry is displayed in the list of the vocabulary entries.

Editing a vocabulary entry

Editing a vocabulary entry can be:

- change its label,
- make it obsolete,
- change its order.


When you make an entry obsolete, it means that it will not be displayed in the available choices when you edit a document. But the value is still displayed on **Summary** tab of documents.

To modify a vocabulary entry:

1. Consult the [vocabulary](#) in which you want to edit the entry.
Click on the **Modify** button corresponding to the entry you want to modify.
The entry modification form is displayed.
2. Edit the entries properties.

3. Click on the **Save** button.
The list of the vocabulary entries is displayed.



Deleting a vocabulary entry

 Deleting a vocabulary entry is a permanent action.

To delete vocabulary entry:

1. Consult the [vocabulary](#) to delete an entry from.
2. Click on the **Delete** button of the entry to erase.
3. On the window that pops up, click on the **OK** button.
The entry is permanently erased. The list of the vocabulary entries is displayed.

Related pages

-  [Managing vocabularies](#)
-  [Editing a workspace](#)

Accessing content

Editing content

Want to know more about vocabularies configuration?

No content found for label(s) vocabularies.

Managing dashboards

The administrators of a Nuxeo DM application can set up the dashboards that will be displayed to users. On a default Nuxeo DM instance, administrators can:

- define the default user dashboard, which is the dashboard displayed to authenticated users by default and which they can [customize](#);
- add external gadgets that users will be able to display on their dashboard by [customizing it](#).



When [anonymous access to Nuxeo DM is enabled](#), administrators can define the anonymous dashboard, which is the dashboard displayed to users that are not logged in. The configuration of the anonymous dashboard works exactly [like the default user dashboard](#).

On this page

- [Defining the default user dashboard](#)
- [Managing external gadgets](#)
 - [Adding external gadgets](#)
 - [Modifying an external gadget](#)
 - [Deleting an external gadget](#)

Defining the default user dashboard

The user default dashboard is used to generate the user's dashboard the first time the user logs in, and when the user clicks on the "Restore default" button on his dashboard.

Nuxeo DM includes a dashboard that is proposed as the default user dashboard. You can edit this default user dashboard to make it adapted to your organization and users. Editing the default user dashboard works the same way users can edit their dashboard. You can:

- [change the dashboard layout](#),
- [add or remove gadgets](#),
- [edit widgets](#).

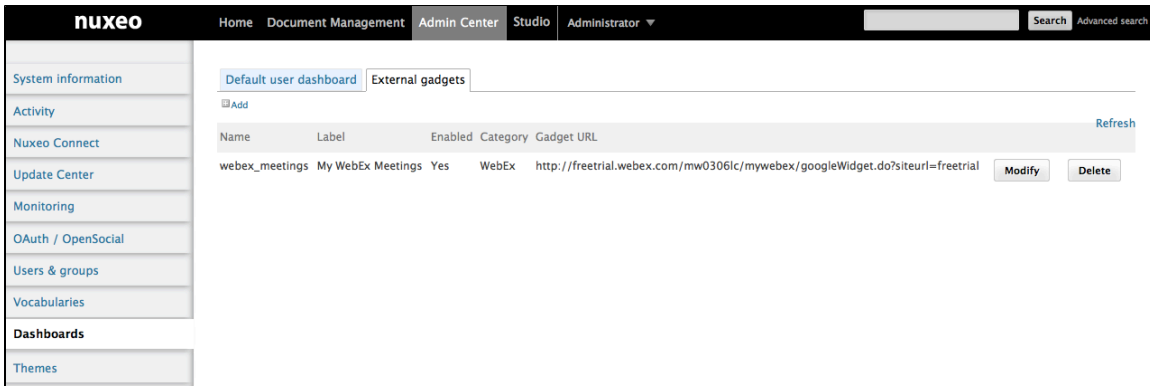
Managing external gadgets

As an administrator, you can add and manage gadgets from other applications or websites so that they are available for users when they click on the "Add gadget" button.

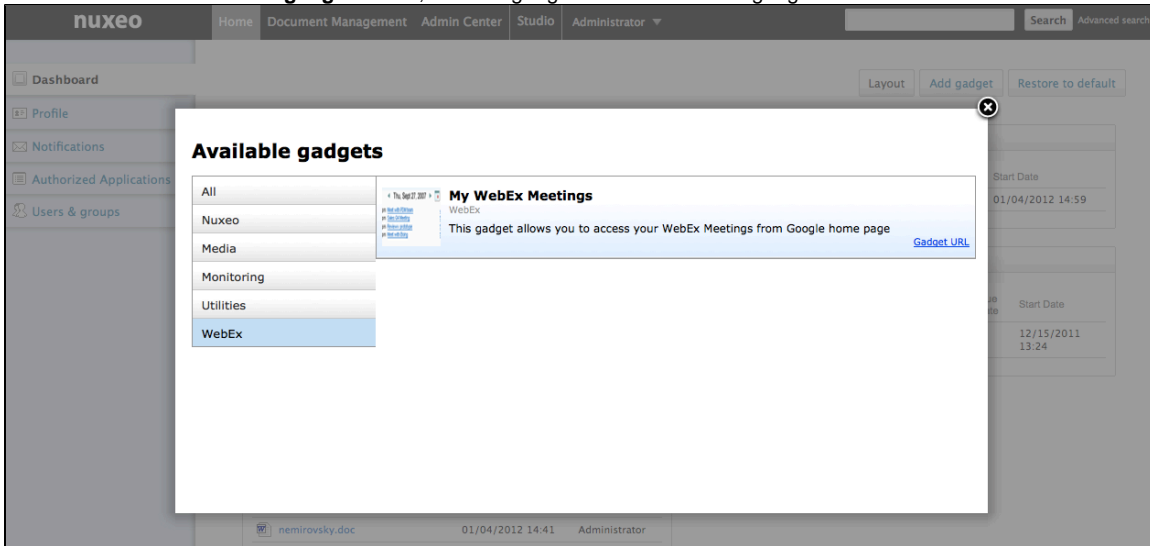
Adding external gadgets

To add an external gadget:

1. On the website which provides the external gadget, copy the gadget's URL.
2. Log in to Nuxeo DM.
3. In the Admin Center, click on the **Dashboards** tab.
4. Click on the **External gadgets** tabs.
The **Add** link is displayed.
If you already added some external gadgets, the list of configured gadgets is displayed.
5. Click on the **Add** link
The form to add a gadget is displayed.
6. Fill in the form (see below for gadget parameters).
7. Click on the **Create** button.
The new gadget and its properties is displayed in a table.



When users click on the **Add gadget** button, the new gadget is available in the gadget list.



External gadget properties

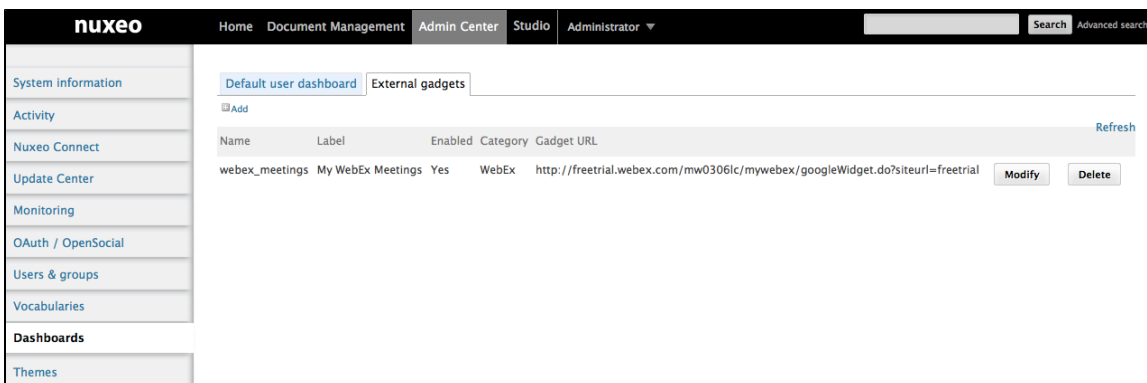
Field	Description
Name	The technical name of the gadget, that can be used by the administrator.
Label	Title of the gadget displayed in its title bar when it's used on the dashboard.
Enabled	Select if your gadget should be displayed in the list of gadgets.
Category	Category in which the gadget will be available. You can either type the name of an existing category or type the name of a new category. Default categories are: Nuxeo, Media, Monitoring, Utilities, Collaborative.
Gadget URL	Type the URL of the widget
Icon URL	URL of the icon to be displayed on the gadget selection pop up if the external gadget has no icon provided by default.

Modifying an external gadget

You can edit the external gadgets you have added at any time. Editing an gadget means changing its properties (for instance updating it).

To edit an external gadget:

1. In the Admin Center, click on the **Dashboards** tab.
2. Click on the **External gadgets** tabs.
The list of available gadgets is displayed.



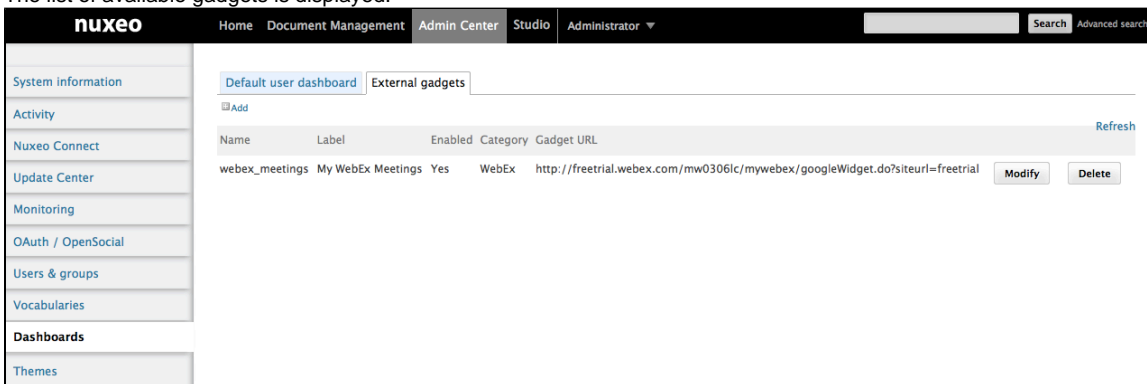
3. Click on the **Modify** button of the widget to edit.
The gadget edit form is displayed.
4. Modify the properties you want to change.
5. Click on the **Save** button.

Deleting an external gadget

When you delete an external gadget, it is **not** removed from the dashboard of the users who already added it.

To delete an external gadget:

1. In the Admin Center, click on the **Dashboards** tab.
2. Click on the **External gadgets** tabs.
The list of available gadgets is displayed.



3. Click on the **Delete** button of the gadget to remove.
A confirmation window pops up.
4. Click on **OK** to confirm gadget deletion.
The gadget is deleted and is not in the gadget list anymore. However it is still displayed on the dashboard of users who added it to their dashboard.

Managing authentication with other applications

The Platform offers the possibility to [use external gadgets in the Nuxeo Platform](#) from the user interface and to use Document Management's gadgets in other websites or applications.

External gadgets can be from public websites and applications, but you can also add gadgets from websites or applications that require you to log in, like a gadget from your email provider. If you want to use Nuxeo's gadgets in other applications, authentication is required as well.

OAuth is a protocol that enables external applications and Nuxeo DM to access each other's data. Users can allow "consumer" (ie external) applications and websites to access the Nuxeo DM data, Nuxeo DM being the "provider".

In this section, we will take the example of iGoogle, that we want to authorize to display Nuxeo's data in a gadget.

To authorize external application to access Nuxeo DM content:

1. In the Admin Center tab, click on the **OpenSocial / OAuth** tab.
2. Click on the **Consumer** tab.
3. Click on the **Add** link.
The form to add a new consumer is displayed.
4. Fill in the form with the parameters below.
5. Click on the **Create** button.

Google consumer parameters

Field	Parameter
Consumer Key	www.google.com
Consumer Secret (HMAC Signature)	Leave empty
Consumer Public Key (RSA Signature)	

```

-----BEGIN CERTIFICATE-----
MIIDBDCCAm2gAwIBAgIJAK8dGINfkS
THMA0GCSqGSIb3DQEBBQUAMGAxCzAJ
BgNV
BAYTA1VTMQswCQYDVQQIEwJDQTEWMB
QGA1UEBxMNTW91bnRhaW4gVm1ldzET
MBEG
A1UEChMKR29vZ2x1IEluYzEXMBUGA1
UEAxM0d3d3Lmdvb2dsZS5jb20wHhcN
MDgx
MDA4MDEwODMyWhcNMDkxMDA4MDEwOD
MyWjBgMQswCQYDVQQGEwJVUzELMAkG
A1UE
CBMCQ0ExFjAUBgNVBAcTDU1vdW50YW
luIFZpZXcxZzARBgNVBAoTCkdvb2ds
ZSBj
bmMxZzAVBgNVBAMTDnd3dy5nb29nbG
UuY29tMIGfMA0GCSqGSIb3DQEBAQUA
A4GN
ADCBiQKBgQDQUV7ukIfIixbokHONGM
W9+ed0E9X4m99I8upPQp3iAtqIvWs7
XCbA
bGqzQH1qX9Y00hrQ5RRQj8OI3tRiQs
/KfzGW0dvLpIk5oXpdT58tg4F1Yh5f
bhIo
VoVn4GvtSjKmJFsoM8NRtEJHL1aWd+
+dXzkQjEsNcBXwQvfDb0YnbQIDAQAB
o4HF
MIHCMB0GA1UdDgQWBBSm/hlpNY91bN
fW08ac9riYzs3cxzCBkgYDVR0jBIGK
MIGH
gBSm/hlpNY91bNfW08ac9riYzs3cx6
FkpGIwYDELMAkGA1UEBhMCMVVMxCzAJ
BgNV
BAGTAkNBMRywFAYDVQQHEw1Nb3VudG
Fpb1BwWV3MRMwEQYDVQQKEwphb29n
bGUg
SW5jMRcwFQYDVQQDEw53d3cuZ29vZ2
xlLmNvbYIJAK8dGINfkSTHMAwGA1Ud
EwQF
MAMBAf8wDQYJKoZIhvcNAQEFBQADgY
EAYpHTr3vQNsHHUm4MkYcDB20a5Kv
cFoX
gCcYtmdyd8rh/FKeZm2me7eQCXgBfJ
qQ4dvVLJ4LgIQiU3R5ZDe0WbW7rJ3M
9ADQ
FyQoRJP8OIMYW3BoMi0Z4E730KSLRh
6kfLq4rK6vw7lkH9oynaHHWZSJLDap
17cP
j+6znWkN9/g=
-----END CERTIFICATE-----

```


Description	Leave empty
Allow 2 legged auth	Leave default value.
Callback URL	http://oauth.gmodules.com/gadgets/oauthcallback
Allow OAuth verifier check bypass	Check "Yes".
Enabled	Check "Yes".

For more information, take a look at these pages:

- [How OpenSocial and OAuth are integrated in the Nuxeo applications,](#)
- [How to use OAuth.](#)

Content Application Platform

The naked Nuxeo Platform, referred to as **Content Application Platform**, is intended to be used as a basis for the development of your own content management applications. As a consequence, it is lean and thin and comes only with the features that we consider key to a content management application. These features, which are directly available to users, can be considered as a subset of the Document Management module features.

Basically, the Content Application Platform has the same features as the [Document Management module](#), minus the features below:

- tags
- faceted search,
- virtual navigation,
- pictures and picture book,
- websites,
- blogs,
- mail folder,
- preview and annotations,
- OpenSocial features.

This page lists the default features of the Content Application Platform.

On this page
<ul style="list-style-type: none"> • User Home • Available spaces and navigation • Document management features <ul style="list-style-type: none"> • Document types • Document creation and edition • Relations • Workflow • Comments • Publishing • Search • Administration <ul style="list-style-type: none"> • Local management • Global management

User Home

The Nuxeo Platform offers users a Home tab from which they can easily access to their content and information. The Home tab offers access to:

- a static dashboard,

The screenshot shows the Nuxeo dashboard for user 'jdoe'. The left sidebar contains links to Dashboard, Profile, Notifications, and Users & groups. The main content area is divided into four sections:

- My tasks:** A table showing tasks requested for performance. The table has columns: Task Name, Title, Directive, Comment, Due date, and Start Date. One task is listed: 'choose-participant' with title 'Document creation', directive 'choose-participant', and due date 'Feb 9, 2012 3:15:43 PM'.
- My workflows:** A section stating 'The workflows you are currently managing are listed below'. It contains a table with columns: Name, Title, and Start Date. One workflow is listed: 'Parallel workflow' with title 'Document creation' and start date 'Feb 9, 2012 3:15:42 PM'.
- My documents:** A table showing documents. The table has columns: Title, Modified, and Last contributor. Four documents are listed: 'Document creation', 'Project team', 'Functional specifications', 'Metadata mapping', and 'Contract', all modified on '12/23/2011' by 'John Doe'.
- Last modified documents:** A section for recently modified documents, showing a table with columns: Title, Modified, and Last contributor.

- the user's profile,

The screenshot shows the Nuxeo user profile page for 'John Doe'. The left sidebar is the same as the dashboard. The main content area displays the user's profile information:

- Username:** jdoe
- First name:** John
- Last name:** Doe
- Company:** My Company
- Email:** jdoe@mycompany.com
- Groups for this user:** Members group, Marketing
- Virtual groups for this user:**
- Avatar:** A placeholder image for the user's avatar.
- Birth date:** 3/31/1982
- Phone number:**

- the summary of all the alerts the user subscribed to,

The screenshot shows the Nuxeo notifications page for user 'jdoe'. The left sidebar is the same as the dashboard. The main content area displays a table of notifications:

Notification	Subscribed to	On document	
Modification	user:jdoe	Documentation /default-domain/workspaces/Documentation	Unsubscribe
Creation	user:jdoe	Documentation /default-domain/workspaces/Documentation	Unsubscribe

- the users and groups directories.

The screenshot shows the Nuxeo Users and Groups directory page. The left sidebar is the same as the dashboard. The main content area displays a search interface for users and groups:

- Search:** A search bar with the text 'John' and buttons for 'Search' and 'Clear'.
- Items/page:** A dropdown menu set to '20'.
- Table:** A table with columns: User, First name, and Last name. Two users are listed: 'jdoe' (John Doe) and 'jsmith' (John Smith).

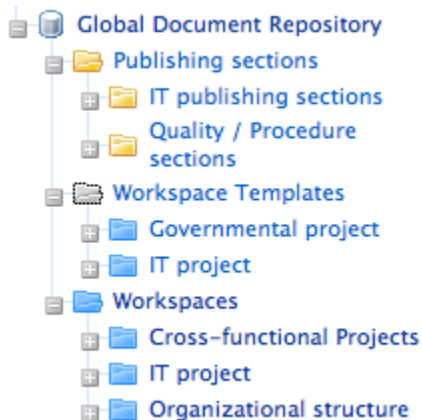
Available spaces and navigation

The Nuxeo Platform offers a predefined basic structure in which users will be able to create, edit and distribute documents.

Documents are created and evolve in [workspaces](#), for which you can create the structure you need. [Templates](#) are available to ease the creation of your workspace structure, in case of repetitive content structure or just to help users have a consistent content structure. Once they are mature enough and ready to be distributed, documents are published in [sections](#), from which a wider audience can easily consult them, with read-only access.

Workspaces, templates and sections are grouped in domains. In most cases a single domain (ie the default domain provided by the Platform) is enough, but you can create a many domains as required to address your project's needs.

To navigate in the content structure, users have the default navigation tree displayed on the left hand side of the pages. It displays all the domain structure from the root. It enables you to easily access any space in the application structure.

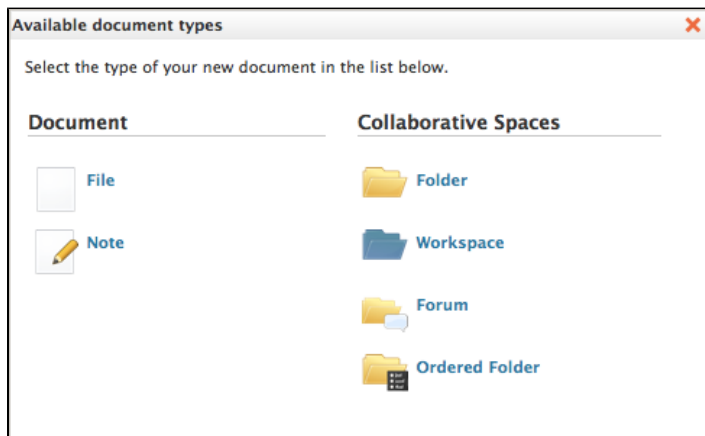


Document management features

Document types

By default, the Nuxeo Platform includes the document types below:

- file,
- note,
- folder and ordered folders,
- forum.



Document creation and edition

The Nuxeo Platform offers different ways to create content:

- **New button**: create documents by filling a form adapted to the document type;
- **Import file button**: create file easily by clicking one button;
- **Drag and drop**: import several documents at the same directly from your desktop using a simple drag and drop;
- **Live Edit**: create documents in the Platform from MS Office, OpenOffice.org and LibreOffice;
- **WSS and WebDav**: browse and access the Nuxeo Platform content from your desktop.

Users also get to edit documents either from the Nuxeo Platform user interface or from their desktop:

- **Documents Edit tab:** edit the content of the documents or their metadata from the Nuxeo Platform user interface, with options to create new versions of the document;
- **Live Edit:** edit the content of office documents from their native application;
- **WSS and WebDav:** browse and edit documents from your desktop.

Whatever the means used to create or edit documents, changes and versions of the documents are tracked in the [document's history](#).







Relations

It is a typical document management need to organize documents and link them to easily find related content. [Relations](#) enable users to put links between documents inside your application, or to link them to external resources.

Workflow

To help users make their document evolve in a controlled way, the Nuxeo Platform provides two [workflows](#) by default, that enable them to change the document's state change and have changes approved.

Workflow

Approved	Name	Right	Directive	Comment	Start date	End date	Due date
	 John Doe	Write	Validation	Solen Gutter : Can you take a quick look?	Jan 19, 2012 5:17:20 PM	Jan 20, 2012 12:00:00 PM	Jan 19, 2012 12:00:00 PM
	 John Smith	Write	Validation	Solen Gutter : For final approval	Jan 20, 2012 12:00:01 PM	Jan 20, 2012 12:00:54 PM	Jan 26, 2012 12:00:00 PM
	 John Doe	Verification after reject	John Smith	: Commercial section is missing.	Jan 20, 2012 12:00:54 PM		

Add a comment below and click one of the links in the table above. You will find all your tasks in your personal dashboard as well. The comment is mandatory only when the task is rejected.


Comments

To ease collaboration on documents, the Nuxeo Platform includes a comment system that enables users to [discuss on the documents](#).

Nuxeo Platform 5.5 User Guide

Summary Edit Files Publish Relations Workflow Alerts **Comments** History

 [Add a comment](#)

 John Smith 1/16/2012 2:25 PM

Reply |

The Social Collaboration chapter is missing.

 John Doe 1/16/2012 2:35 PM

[Reply](#) | [Delete](#)

Chapter has been added. Thanks for reporting this :)

Publishing

When they are ready to be distributed to an audience for consultation, documents should be published in sections. The [default publishing workflow](#) involve a validation of the publication before the document is actually available to all section readers.

Nuxeo Platform 5.5 User Guide

Summary Edit Files **Publish** Relations Workflow Alerts Comments History

Sections Local Sections (Default domain)

- Sections
 - IT publishing sections [Publish here](#)
 - Quality / Procedure sections
 - Product procedures [Publish here](#)
 - Quality guidelines [Publish here](#)

Title	Current version	Action
Default domain>Sections>Quality / Procedure sections>Product procedures	0.4	

To help users choose where the document should be published, the Nuxeo Platform features the **publication targets** of a workspace, ie a pre-selection of sections in which users will be able to publish documents.

Search

The Nuxeo Platform offers two different ways to search content:

- the [simple search](#), which enables users to search documents using full text from any page in the application (without suggestion);
- the [advanced search](#), which enables users to search documents on specific metadata values and several criteria.

Advanced search Items/page 20

Filter Clear filter

Required words

Title

Description

Nature

Select a value
Accommodation application form
Acknowledgement of receipt
Application
Article

Subjects

Select a value
Art
Daily life
Human science

Select a value

Add

Administration

Local management

CAP offers the features below to manage a space:

- [access rights management](#),
- [trash management](#),
- configuration of the [space's look](#), the available document types, content lists presentation, [local advanced search](#) (minus the faceted search local configuration),
- [alerts](#),
- [publication targets](#).

Local rights ⚠

Type	Username	Granted permissions	Denied permissions
<input type="checkbox"/>	John Doe	Write	Remove

Global management

The administrators of the Nuxeo Platform have a dedicated environment to manage the application, from the Admin Center tab. This tab provides access to the features below:

- [users and groups management](#),
- [vocabulary management](#),
- [connect registration and update center](#),
- [monitoring features](#),
- [system information](#).

nuxeo Home Document Management Admin Center Studio Administrator ▼ Search Advanced search

System information
Activity
Nuxeo Connect
Update Center
Monitoring
Users & groups
Vocabularies
Themes

[Nuxeo software updates](#) [Nuxeo Studio](#) [Packages from Nuxeo Marketplace](#) [Local packages](#)

The list below contains all the packages that have been installed (or simply downloaded) via the Update Center.

Package type

Package	Version	Architecture	Status	Actions
nuxeo-5.5.0-HF01-1.0.0	Nuxeo 5.5.0-HF01	1.0.0	hotfix running	<input type="button" value="Uninstall"/>
nuxeo-5.5.0-HF02-1.0.0	Nuxeo 5.5.0-HF02	1.0.0	hotfix running	<input type="button" value="Uninstall"/>
nuxeo-cmf-5.5.0	Nuxeo CMF	5.5.0	addon downloaded	<input type="button" value="Install"/> <input type="button" value="Remove"/>
nuxeo-content-browser-1.0.0	Nuxeo Content Browser	1.0.0	addon running	<input type="button" value="Uninstall"/>
nuxeo-content-browser-1.0.0-cmf	Nuxeo Content Browser for CMF	1.0.0-cmf	addon downloaded	<input type="button" value="Install"/> <input type="button" value="Remove"/>
nuxeo-dam-5.5.0	Nuxeo DAM	5.5.0	addon downloaded	<input type="button" value="Install"/> <input type="button" value="Remove"/>
nuxeo-dm-5.5.0	Nuxeo DM	5.5.0	addon downloaded	<input type="button" value="Install"/> <input type="button" value="Remove"/>
nuxeo-platform-smart-search-5.4.2	Smart Search	5.4.2	addon downloaded	<input type="button" value="Install"/> <input type="button" value="Remove"/>
nuxeo-social-collaboration-5.5.0	Nuxeo Social Collaboration	5.5.0	addon downloaded	<input type="button" value="Install"/> <input type="button" value="Remove"/>

Marketplace addons

Here is the list of Nuxeo packages available on the Nuxeo Marketplace for Nuxeo DM 5.5:

Package name	Public / Registered access	Comment
Amazon S3 Online Storage	Registered access	
Automated Document Categorization	Public	
Digital Signature	Registered access	
Frequently Asked Questions	Public	
Nuxeo - BIRT Integration	Registered access	
Nuxeo GSA Connector	Registered access	
Nuxeo Poll	Registered access	
Validator resolved by permission workflow	Public	

Automated Document Categorization

The Automated Document Categorization package enables the system to automatically fill in some metadata of the document when it is created, from the document's content. When a user creates a new document, the text of the note or of the file is analyzed and the system fills some metadata automatically from this text. This occurs when documents are created using all the means provided by Nuxeo DM (the **New** button, **Import a file** button and Drag&Drop).

The metadata that the system fills in automatically are:

- language
- coverage
- subjects

You can at anytime edit the document to change and complete the metadata of the document. The system fills the metadata at document creation, but then it doesn't update or control them when the document is edited.

The screenshot shows the Nuxeo interface for a document titled 'famous_dancer.doc'. The interface includes a navigation bar with tabs: Summary, Edit, Files, Publish, Relations, Workflow, Alerts, Comments, History, and Preview. The 'Summary' tab is active, displaying the document's content and metadata.

Content: The document is a file named 'famous_dancer.doc' (116 kB).

Common metadata:

- Nature:** Subjects: Art/Dance, Art/Paint, Art/Literature
- Rights:** Source: Europe/France
- Coverage:** Created at: 11/19/10 4:48 PM, Last modified at: 11/19/10 4:48 PM
- Format:** Language: fr
- Expire on:** Author: John Doe, Contributors: John Doe

State: Project: Version: 0.0

Associated tags: This document is **unlocked** | [Lock](#)

Local Sections (Default domain):

Digital Signature

The digital signature add-on introduces PDF signing capabilities to Nuxeo DM (5.4.2)/Nuxeo Content Application Platform (5.5 & up). This add-on also provides generation of user certificates, which are required for document signing.

The Nuxeo DM Digital Signature add-on allows you to:

- download the PDF for previewing,
- download the root certificate to install inside your PDF viewer for verifying any future

- certificates,
- navigate to certificate generation,
- sign the PDF,
- view existing certificates without opening the signed PDF

Digital signature concepts

Principles

- documents are signed to protect them from modification, especially at critical stages in their life-cycle
- document- and user-certification in Nuxeo DM follow principles of asymmetric cryptography, PKI & the X.509 standards
- to sign a document, a user needs a personal certificate
- each user can create her own certificate
- certificates are issued by Certificate Authorities (CAs)

What is a digital signature?

... or why sign your documents digitally?

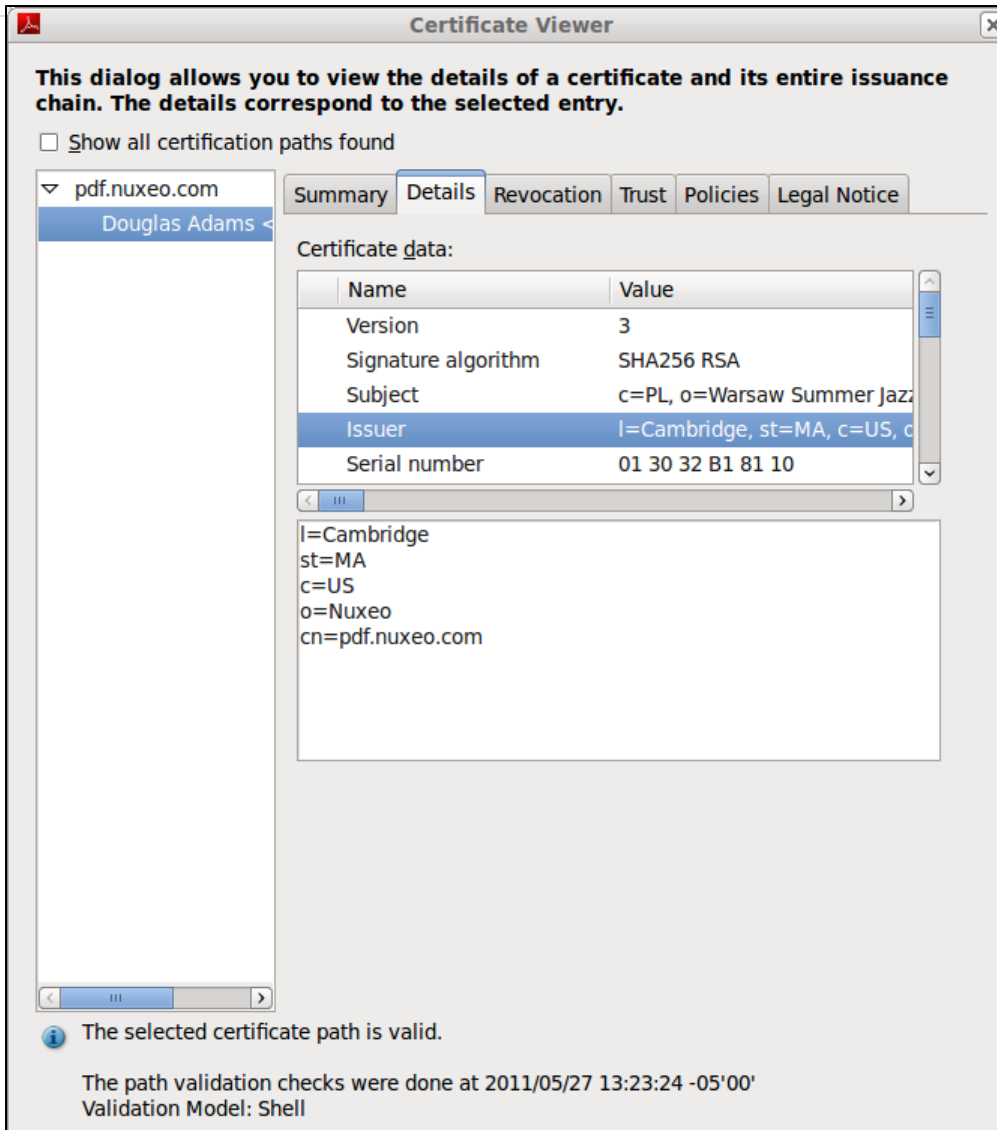
Digital signatures uniquely identify the document signer. They provide a similar functionality to handwritten signatures on paper, and are a convenient alternative to signing and scanning documents when a digital version of a document is required. Digital signatures are meant to assure authenticity and integrity of documents, that is to verify that the document originator - or signer - is who they claim to be, and to ascertain that a document has not been tampered with between the moment of signing and the subsequent viewing.

What is a digital certificate?

Before you sign a document you need a digital certificate. Certificates are attached to documents to verify the identity of the signer, that is to check that the person signing the message is who they claim to be. Certificates are issued by Certificate Authorities (CA, also known as Issuer). To verify that a certificate has not been tampered with, it has to be validated against the CA's public key. If this verification is passed it means that the CA certifies the authenticity of the signer. Digital certificates are formatted using PKI standards, the most common of them is X.509, which is also used in this add-on.

In this section

- Digital signature concepts
 - Principles
 - What is a digital signature?
 - What is a digital certificate?
 - The Local CA and the Root CA
 - Root Certificate Authority
 - Local CA
 - CA-signing vs self-signing
- Installation
 - How to make sure that the Digital Signature plugin was installed correctly? How can one test the installation?
- Configuration
 - The root certificate
 - Setting up the local root certificate
 - Company information for new certificates
- How to use the digital signature
 - Top-level view
 - Generate your certificate
 - Sign a document
 - Verify the signature of the PDF file
- References



The Local CA and the Root CA

Root Certificate Authority

The highest level certificates are created by root CAs which are supposed to be trusted publicly. No higher authority can certify the root certificates – those are the top-level certificates.

You can see examples of those in your browser, under the certificate authorities/ CA section.

Here are some of the more popular ones:

Equifax Secure CA; VeriSign Class 3 Public Primary Certification Authority; Visa eCommerce Root; Deutsche Telekom Root CA 2

Local CA

Your Local CA will be used to sign user certificates. The local CA certificate can either be signed by a higher-level certificate authority, or be self-signed. The local CA certificate will be created inside the system hosting your Nuxeo CAP/DM instance.

Note: the default Local CA that comes with our plugin is just an example certificate to be used for initial setup testing, and it should not be used for signing production documents.

Certification chains

Now let's consider the following relationships:

1. The document signature includes => the signer's certificate (user certificate)
2. user certificate was signed with => your local CA certificate

3. your local CA certificate was signed by => a higher level CA certificate
4. the higher level CA certificate was signed by => a still higher CA certificate (... and so on... ..and then, finally)
5. a very high level CA certificate was signed by => the root CA certificate.

The root CA certificate closes the chain that leads down to the user's certificate.

Now, instead of verifying all the intermediary certificates, it is enough for your PDF viewer to have the root Certificate Authority – via the sequence of intermediary CAs – verify it for you.

The root certificates are usually already present in popular PDF viewers and browsers, and if not, they can be updated automatically provided your software has been set up properly.

CA-signing vs self-signing

... as applied to you local CA certificate:

If your local CA certificate was signed by a certificate authority, the users usually don't have to install your company's certificate in their browsers to verify the signed documents.

On the other hand, if your local CA was self-signed, the CA-certificate has to be manually installed in the PDF viewer prior to verifying signatures. This has to be done only once per PDF viewing program and an example of certificate installation in a PDF viewer has been presented in our documentation.

Installation

1. [Install the package from the Admin Center](#)
2. [Configure the certificates](#) so that they match your company's profile.
3. Restart Nuxeo DM.

How to make sure that the Digital Signature plugin was installed correctly? How can one test the installation?

When you perform the standard installation this plugin works as expected. However, if you wanted to verify that all is where it should be (e.g. if you are not sure if you already restarted your Nuxeo application, or you made some other system changes that you think might have impacted this plugin's operation, here are some ways to verify the installation:

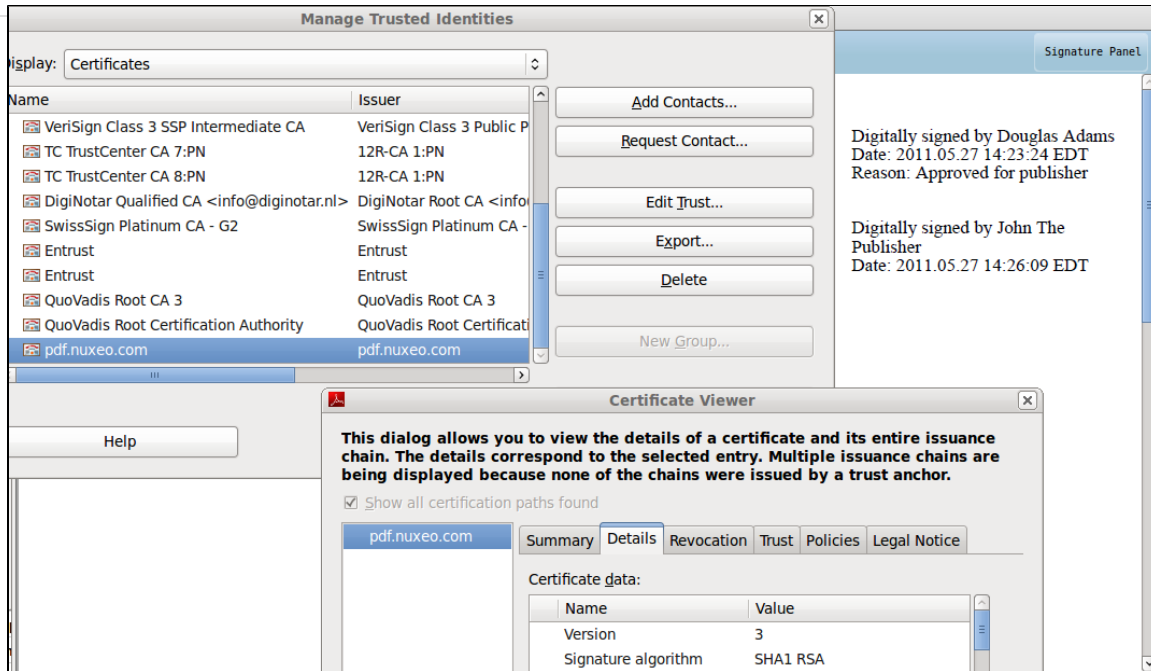
1. check in your local package list that the "Digital Signature" plugin shows as installed (Admin Center > Update Center > Local Packages).
2. click on the "Home" tab and make sure that you see the "Certificates" tab on the left, among other tabs like "My Dashboard", "Profile", etc
3. upload a new file of type PDF. This will create a new document. When you look at the tabs of your new document you should see a new tab called "Signature"
4. try to sign your new document (the ultimate test)
 - a. you should be directed to the "Certificates" tab first to create your certificate,
 - b. after creating a certificate you should see a sign-form in your document (signature tab)
 - c. sign the document, preview it and you should see a signature field in your PDF.

Configuration

The Digital Signature package provides a sample root certificate populated with sample company's values. However you will need to configure the package so that documents are signed with your company's certificate and information instead of the sample one.

The root certificate

i To disambiguate, the term "root certificate" in this article - and in the configuration of this plugin - relates to the Local Certificate Authority (CA) of your company which is the root of all user certificates. This is not to be confused with the global root Certificate Authority, that is one of the top-most entities of the global "chain of trust". This plugin's root certificate helps establish a simple method of user certificate verification, as it can be installed in a PDF reader. The best approach, however, is to have your local Certificate Authority's certificate signed by a higher level CA whose ancestor has been signed by one of the actual root Certificate Authorities. This incurs some setup overhead in the initial stages of the project. This method guarantees, though, a more secure approach to document verification, and frees the end users from having to install certificates in their PDF readers. PDF readers capable of handling security are updated automatically with the global root Certificate Authority information.



As the keystore configured in the installable package is a sample keystore containing a test configuration, it is required that it be replaced with the client keystore containing the keypair and the certificate to be used for signing user certificates. As of now the certificate+keypair need to be stored in a .jks formatted keystore and configured via the extension mechanism.

Setting up the local root certificate

The user certificate generation step requires a Certificate Authority certificate (CA) to be set up inside the Nuxeo CAP system as all user certificates have to be signed by a CA with a recognizable identity – a company rather than a single user. The term local CA can be understood here as "company Certificate Authority" or "system-wide Certificate Authority". Note that there is only one CA certificate per system but each user can have his own certificate.

To set up your local CA certificate:

For this exercise you will need the following software:

keytool : the keytool comes with your JDK (Java Development Kit) installation.

openssl : Open SSL

Configuration overview

Here is the overview of the steps that need to be followed:

1. create company keys & certificate
2. create a certificate signing request (CSR)
3. sign the CSR (or have it signed by a trusted CA)
4. save your keys and the certificate in the jks keystore

Detailed steps

- create a keypair (with alias pdfcakey in this example)

```
keytool -genkey -keyalg RSA -alias pdfcakey -keypass password -validity
365 -keysize 1024 -dn "cn=PDF-CA, ou=Headquarters, o=Example
Organization, c=US" -keystore pdfca-keystore.jks
```

This creates a keypair (private and public key), and self-signs it automatically. If you don't wish to use a 3rd party Certificate Authority to sign your key, you can stop here.

- create a certificate signing request (CSR)

```
keytool -keystore pdfca-keystore.jks -storepass aaaaaa -alias
alternatekey -keypass password -certreq -file pdfca.csr
```

- submit the CSR to a well-known 3rd party Certificate Authority of your choice to sign it
- when you receive the signed certificate pdfca.crt, import it into your keystore using a new new alias (pdfcacert in this example)

```
keytool -import -trustcacerts -alias pdfcacert -file pdfca.crt -keystore
pdfca-keystore.jks
```

You can find examples of 3rd party CAs [here](#) and [here](#).

An alternative method would be to set up a local signing CA and use it for signing certificates (keeping in mind that this approach, though it could work for small-scale deployments, is not recommended for production purposes):

CREATE A CERTIFICATE AUTHORITY (CA)

- create a CA key

```
openssl genrsa -out ca.key 2048
```

- create a self signed CA certificate

```
openssl req -new -x509 -days 356 -key ca.key -out ca-self-signed.crt
```

CREATE A SUBORDINATE CERTIFICATE AUTHORITY (SUBCA)

- create the key for the subordinate CA

```
openssl genrsa -out subca.key 2048
```

- create a certificate signing request (CSR) for the subordinate CA

```
openssl req -new -key subca.key -out subca.csr
```

- sign the CSR of the subordinate CA

```
openssl x509 -req -days 730 -in subca.csr -CA ca-self-signed.crt -CAkey
ca.key -set_serial 01 -out subca.crt
```

- import a certificate created from your CSR into a JKS keystore

```
keytool -import -alias certalias -file subca.crt -keystore keystore.jks
```

- convert the x509-certificate and the key to pkcs12 format to make it importable into the java keystore

```
openssl pkcs12 -export -in subca.crt -inkey subca.key -name keyalias
-CAfile ca.crt -caname root -out subca.p12
```

(use "export" as password when prompted)

- convert the pkcs12 file to jks format

```
keytool -importkeystore -deststorepass storepass -destkeypass keypass
-destkeystore keystore.jks -srckeystore subca.p12 -srcstoretype PKCS12
-srcstorepass export -alias keyalias
```

Now you will need to replace the sample certificate with your own that you just created. You can use the configuration information below which explains how to override the sample certificate with your company certificate.

To replace the sample root certificate:

1. Create a "****-config.xml" (e.g. "rootcert-digitalsignature-config.xml") file with the content below:

```
<component name="my.signature.rootservice.config">
  <require>org.nuxeo.signature.config.default</require>
  <extension
target="org.nuxeo.ecm.platform.signature.api.pki.RootService"
point="rootconfig">
    <configuration>

<rootKeystoreFilePath>test-config/keystore.jks</rootKeystoreFilePath>
    <rootKeystorePassword>abc</rootKeystorePassword>
    <rootCertificateAlias>pdfcacert</rootCertificateAlias>
    <rootKeyAlias>pdfcakey</rootKeyAlias>
    <rootKeyPassword>abc</rootKeyPassword>
    </configuration>
  </extension>
</component>
```

2. Put the extension in the config directory of your server:
 - \$NUXEO/nxserver/config for a Tomcat distribution,
 - \$NUXEO/server/default/deploy/nuxeo.ear/config for a JBoss distribution.

Company information for new certificates

Another extension provides general company information used in all certificates, like Country, Locale, Organization Name and Organizational Unit.

To add your company's information for users certificates:

1. Create another XML file called "****-config.xml" (e.g. "companyinfo-digitalsignature-config.xml") with the content below:

```
<?xml version="1.0"?>
<component name="my.signature.userservice.config">
  <require>org.nuxeo.signature.config.default</require>
  <extension
target="org.nuxeo.ecm.platform.signature.api.user.CUserService"
point="cuserdescriptor">
    <userDescriptor>
      <countryCode>MX</countryCode>
      <organization>Sigma Alimentos</organization>
      <organizationalUnit>Marketing</organizationalUnit>
    </userDescriptor>
  </extension>
</component>
```

2. Put the extension in the config directory of your server:
 - \$NUXEO/nxserver/config for a Tomcat distribution,
 - \$NUXEO/server/default/deploy/nuxeo.ear/config for a JBoss distribution.

How to use the digital signature

After you installed the add-on from the Admin Center, you get some new tabs in your Nuxeo DM interface:

- users have a new "Certificates" tab in their Home, from which they can [generate their certificate](#) to be able to sign documents,
- files documents have a new "Signature" tab, from which they can either see the signatures or [sign the document](#) if they have the right to.

Top-level view

From a high-level functional point of view, here is what users need to be able to do using the digital signature add-on:

1. User A creates a certificate.
2. User A signs a document.
3. User B installs the root certificate in a PDF viewer.
4. User B opens a document, previews the document with a visible signature and can check its authenticity against the root certificate.

Generate your certificate

To be able to [sign documents](#), users need to have a certificate. Every user of the application can have a certificate. However, this not automatic: users have to generate it. When users generate their certificate, they are asked to choose a password, that will be required to sign the document.



Make sure you remember your password (or store it secured) as currently there is no mechanism for resetting lost passwords.

The certificate generation relies on two sets of information:

- user's information: user's first name, last name and email address. The email address is used to check the user's unicity.
- global company information entries configured by the system administrator.

To generate your certificate:

1. In Nuxeo DM, click on the **Home** main tab.
2. Click on the "Certificates" tab, where you can generate your certificate.

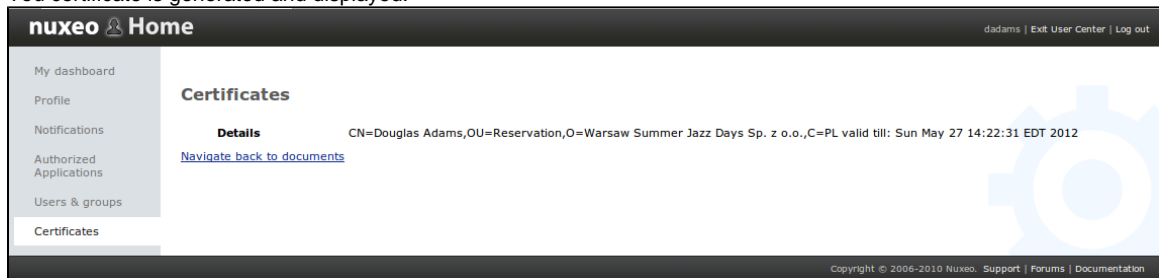


If you have no certificate yet, a link to the "Certificates" tab is displayed directly from the documents "Signature" tab.

A form to generate your certificate is displayed. If you already generate your certificate, it is displayed instead of the generation form.

3. Type and confirm the password that you will be asked when you sign documents.
4. Click on the **Generate certificate** button.

Your certificate is generated and displayed.



Sign a document

Only users with "Write" permission can sign documents, and signature is actually possible when the main attachment of the file is a PDF file.

To sign a document:

1. Click on the **Signature** tab of the document.
The signing form is displayed, below the Main file and Root Certificate sections.



You must have a certificate to sign documents.
If you haven't [generated your certificate](#) yet, you are displayed a link to the certificate management instead of the signing form.

sample.pdf

Summary Edit Files Publish Relations Workflow **Signature** Alerts Comments History Preview

Main file

File **sample.pdf**

Root Certificate

[Download the public root certificate for your PDF viewer](#)

Signing form

You did not sign this document

Signing Reason

Approved for publisher preview.

Certificate Password

••••••••

Sign now

2. Type a comment in the "Signing reason" text area.
3. Type your password in the "Certificate password" field.
4. Click on the **Sign now** button.
Your signature is displayed on the Signature tab instead of the signing form. It is composed of your certificate, your organization's certificate, and the expiration date of your certificate.

sample.pdf

Summary Edit Files Publish Relations Workflow **Signature** Alerts Comments History Preview

Main file

File **sample.pdf**

Root Certificate

[Download the public root certificate for your PDF viewer](#)

sample.pdf has been signed

Document Signatures

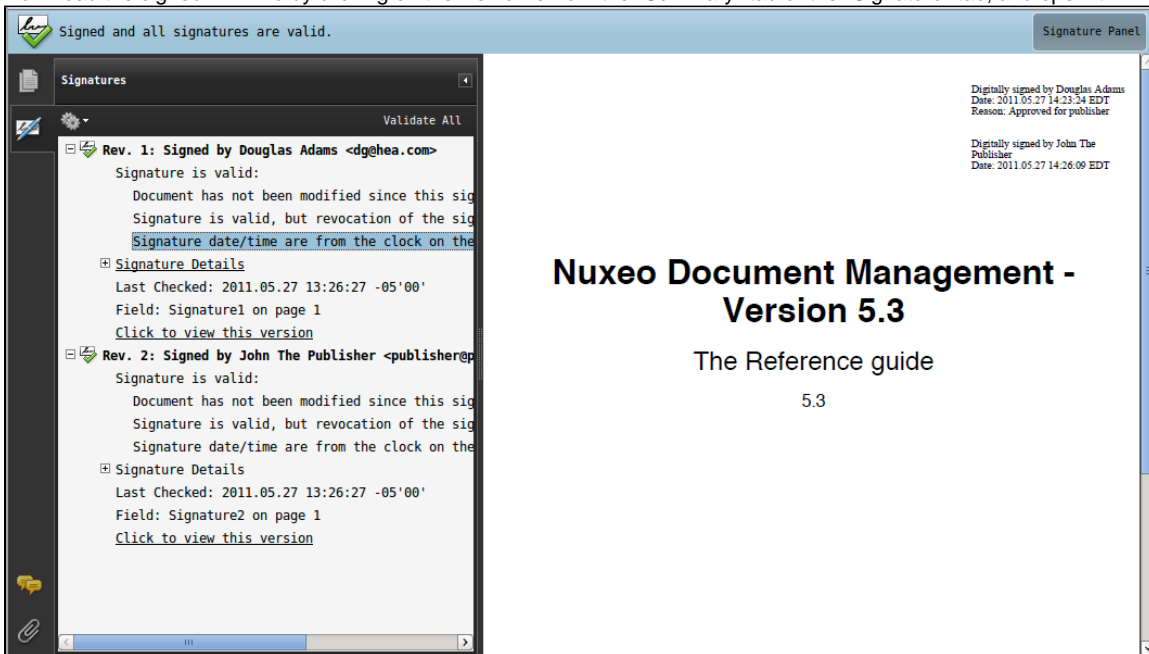
This certificate belongs to CN=John The Publisher, OU=Reservation, O=Warsaw Summer Jazz Days Sp. z o.o., C=PL. It was issued by CN=pdf.nuxeo.com, O=Nuxeo, C=US, ST=MA, L=Cambridge. It will expire on Sun May 27 14:25:36 EDT 2012
This certificate belongs to CN=Douglas Adams, OU=Reservation, O=Warsaw Summer Jazz Days Sp. z o.o., C=PL. It was issued by CN=pdf.nuxeo.com, O=Nuxeo, C=US, ST=MA, L=Cambridge. It will expire on Sun May 27 14:22:31 EDT 2012

The main file of your document is automatically updated to be the signed version of the PDF. The previous version of the main file is now available as an attachment to the document, editable from the "Files" tab.
The signing of the document is logged in the "History" tab.

Verify the signature of the PDF file

To verify the signature of the PDF, you need to:

1. Install the public root certificate available from the "Root Certificate" section of the "Signature" tab:
 - a. Click on the **Download the public root certificate for your PDF viewer** link to download the certificate.
 - b. Follow your operating system usual certificate installation steps.
2. Download the signed PDF file by clicking on the file name from the "Summary" tab or the "Signature" tab, and open it.



References

- <http://download.oracle.com/javase/1.5.0/docs/guide/security/cert3.html>
- http://en.wikipedia.org/wiki/Digital_signature
- <http://dev.blogs.nuxeo.com/2011/06/digital-signatures-within-nuxeo-document-management.html>

FAQ Plugin

The FAQ plugin provides a Frequently Asked Questions publishing system that enables users to share their knowledge. It offers a mean to search for frequent questions depending on their metadata, display their answers quickly, organize questions in dedicated folders, and export them in HTML format. A publishing process protects the visibility of the FAQ entry until its author decides it to be visible to other members.



The FAQ plugin was all configured using [Nuxeo Online Services](#). You can import the corresponding [Application Template](#) into your Studio project if you have one, so that you can adapt the metadata to your needs, as well as the presentation and the publishing logic.

On this page

- [Installation](#)
- [Using the FAQ plugin](#)
 - [FAQ plugin access rights overview](#)
 - [Creating a FAQ folder](#)
 - [Create a new question](#)
 - [Answer a question](#)
 - [Publish a question](#)
 - [Vote for / against questions](#)
 - [Browse questions](#)
 - [Export questions as HTML](#)

Installation

There are no specific requirements to install the FAQ plugin. You can [Install it from the Marketplace](#) or [from the Admin Center](#).

Using the FAQ plugin

The FAQ plugin add to your Nuxeo DM application two new document types:

- the FAQ folder, that users can create in workspaces,
- the FAQ entry, ie the questions.

FAQ plugin access rights overview

With read only rights, you can:

- View the questions and their answer in the QA folder,
- Up and Down vote existing questions using the buttons in the the questions's Summary actions,
- Extract some questions and their answer into HTML.

With read / write rights, you can:

- Create a new question into an existing FAQ folder.
- Edit and answer questions.
- Publish answers so that all users can see it.

With Manage everything rights, you can:

- Create a FAQ folder in a workspace.

Creating a FAQ folder

FAQ folders can be created in workspaces only, by users that have at least Write permission in the workspace.

To create a FAQ folder:

1. Go in a workspace.
2. Click on the **Create FAQ Folder** button.
3. Fill in the creation form.
 - Title: give the folder a name.
 - Description: optionally, type a text that explains to users what kind of questions they should expect in this folder, what the folder is about, or any information you find relevant.
4. Click on **Save**
The **Content** tab of the FAQ folder is displayed. The folder is empty.

FAQ folders work like [Nuxeo DM regular folders](#).

Create a new question

Questions, also called FAQ entries, can only be created in FAQ folders. Users need at least the Write permission in the FAQ folder to be able to create new FAQ entries.

To create a question:

1. In the FAQ folder, click on the **Add a new question** button.
2. Fill in the creation form (see details below).
3. Click on the **Create** button.
The **Summary** tab of the question is displayed.

Question parameters

Field	Description
Question	Type the question label.
Topic	Select what the question is about.
Product	Select to which product your question is about.
QAEEntry Answer	Type the answer to the question. This can be done later by another user.



You can edit the topic and product values using [Nuxeo DM's vocabulary management feature](#).

Answer a question

Users need at least the Write permission to answer a question.

To answer a question, you need to edit it and update the **QAEntry Answer** field.

Publish a question

When you create a question, it is visible only to users who have the Write and Manage permissions on the FAQ folder. To make it visible by all the users that can access the FAQ folder, you need to publish it.

To publish a question, click on the **Publish** link displayed in the **Custom actions** section of the **Summary** tab. The question is immediately available to all users having access to the FAQ folder.

Vote for / against questions

The FAQ plugin offers a vote feature that enables users to indicate if they think the question, and especially its answer, are useful. Users can only vote on published questions.

To vote for a question, click on the **Upvote** link in the **Custom actions** section of the **Summary** tab. The **Usefulness** grade is updated.

To vote against a question, click on the **Downvote** link in the **Custom actions** section of the **Summary** tab. The **Usefulness** grade is updated.

Nuxeo clustering configuration

Summary | Edit | Relations | Alerts | Comments | History | Manage

Metadata

Question	Nuxeo clustering configuration
Topic	Installation/Connect Initialisation
Product	Nuxeo DAM
Answer	

Custom actions

- Add to wishlist
- Upvote
- Downvote

For earlier Nuxeo versions without nuxeo.conf configuration, to enable clustering, configure two identical Nuxeo instances with datasources pointing to the same database server and sharing the same filesystem for theNXRuntime/binaries or folder.

On Nuxeo 5.2.1 this is achieved by sharing the complete JBoss data folder using the JVM system property definition – `Djboss.server.data.dir=/some/shared/folder` (using a SAN, a NFS, sshfs or Windows/samba shared folders for instance) in `run.conf` or `run.bat` JVM options. On Nuxeo 5.3 and later, it is recommended to only share the binaries folder as explained in the following.

On all nodes, configure the `nuxeo.ear/config/default-repository-config.xml` file (it may have a different but similar name) the configuration:

Usefulness 0

Creator	Administrator
Created	Jul 20, 2011
Modified	Jul 20, 2011

Associated tags

- Add tags
- State Approved Version 0.0

Browse questions

You can filter the list of questions from a FAQ folder to find all the questions that relates to a specific topic or product.

To browse the questions:

1. Click on the **Filter** link displayed on top of the question list.

The screenshot shows the 'Presales questions' interface. At the top, there is a navigation bar with tabs: Content, Edit, Alerts, History, and Manage. Below this is a section titled 'Add a new Question' and a 'Filter' link. The main content area displays a list of questions. The first question is 'Nuxeo clustering configuration', which is expanded to show its content. The second question is 'Nuxeo compatibility with Open LDAP', which is also expanded. The third question is 'VCS architecture', which is not expanded. Each question entry includes a checkbox, an icon, the question title, a brief description, the topic, the last modification date, and a usefulness score. At the bottom of the list, there are buttons for 'Paste', 'Add to worklist', 'Copy', and 'Delete'.

Icon	Question	Topics	Last_Modification_Date	Usefulness
<input checked="" type="checkbox"/>	Nuxeo clustering configuration	Installation/Connect Initialisation	Jul 20, 2011	0
<input checked="" type="checkbox"/>	Nuxeo compatibility with Open LDAP	Administration Problems/Rights Gestion	Jul 20, 2011	0
<input checked="" type="checkbox"/>	VCS architecture	Installation/Connect Initialisation	Jul 20, 2011	0

2. Fill in the filter form with your criteria.
 3. Click on the **Filter** button.
- Only the question meeting your criteria are displayed below the filter form.

Export questions as HTML

You can export a selection of questions in HTML format. This takes two steps:

1. Select the questions you want to export:
 - Either click on the **Add to worklist** link in the **Custom actions** section of the **Summary** tab of the question;
 - Or, from the **Content** tab of the FAQ folder, select the questions you want to export using the checkboxes and click on the **Add to worklist** button.

In both cases, the question(s) is displayed in the Worklist in the left column of the screen.
2. In the Worklist, click on **Export to HTML**.
The selection is downloaded as an HTML file.

Nuxeo FAQ (3 entries)		
Question : "Nuxeo clustering configuration"	Product : Nuxeo DAM	Topic(s) : <ul style="list-style-type: none"> FAQ_install/FAQ_connectInitialisation
Answer : <p>For earlier Nuxeo versions without nuxeo.conf configuration, to enable clustering, configure two identical Nuxeo instances with datasources pointing to the same database server and sharing the same filesystem for theNXRuntime/binaries or folder.</p> <p>On Nuxeo 5.2.1 this is achieved by sharing the complete JBoss data folder using the JVM system property definition -Djboss.server.data.dir=/some/shared/folder (using a SAN, a NFS, sshfs or Windows/samba shared folders for instance) in run.conf or run.bat JVM options. On Nuxeo 5.3 and later, it is recommended to only share the binaries folder as explained in the following.</p> <p>On all nodes, configure the nuxeo.ea/config/default-repository-config.xml file (it may have a different but similar name) the configuration:</p>		
Question : "Nuxeo compatibility with Open LDAP"	Product : Nuxeo DM	Topic(s) : <ul style="list-style-type: none"> FAQ_administration/FAQ_rightsGestion
Answer : <p>Nuxeo is compatible with Open LDAP</p>		
Question : "VCS architecture"	Product : Nuxeo DAM	Topic(s) : <ul style="list-style-type: none"> FAQ_install/FAQ_connectInitialisation
Answer : <p>The Visible Content Store (VCS) is the default storage backend shipped with Nuxeo EP 5.3. It uses H2 as default embedded database but this is not the one recommended for production use: Nuxeo recommends the use of PostgreSQL as storage backend.</p>		

Related Topics

[Installing a Marketplace package](#)
[Managing access rights in Nuxeo DM](#)
[Working with Relations](#)
[Editing documents in Nuxeo DM](#)
[Managing Vocabularies](#)

Nuxeo - BIRT Integration

The Nuxeo - BIRT Integration package leverages the reporting features of [Eclipse BIRT](#), enabling users to create reports on the application's activity, directly from Nuxeo DM.

When the Nuxeo - BIRT Integration package is installed on Nuxeo DM, users can create and generate reports, defining what statistics they want to compute. To help them, the application's administrators create report models, that already set up some parameters. The report models are based on BIRT report files that have been imported in Nuxeo DM. All the parameters defined in the BIRT report file are extracted and administrators can edit them in Nuxeo DM using the edit form of the Report Model. Then, users can create reports in Nuxeo DM, based on this model. Reports are bound to the document context, allowing to automatically get and use information on the report (like where the report is in the application's tree, etc).

Before you start / Prerequisites

The whole process to make reports available and use them takes places in two places:

- in BIRT designer, to prepare the models,
- in Nuxeo DM, where administrators can create report models and users can create and generate reports.

As a consequence, you need to install and set up:

- Nuxeo DM,
- BIRT designer (version 2.6)
- the Nuxeo - BIRT Integration package.

Nuxeo DM

The Nuxeo - BIRT Integration package works on Nuxeo DM 5.4.1+.
Nuxeo DM must run with PostgreSQL. You can see and edit the database settings from the [Admin Center](#).

BIRT designer

Of course, the administrators who will prepare report models need to have the BIRT designer installed to be able to create BIRT report files and use them in Nuxeo DM to create the models. However, it doesn't need to be installed on the same computer as Nuxeo DM. The BIRT engine required to generate reports from Nuxeo DM is included in the Nuxeo - BIRT Integration package.

Nuxeo - BIRT Integration package

The Nuxeo - BIRT Integration package is available from the [Nuxeo Marketplace](#).

After you installed the Nuxeo - BIRT Integration package, here are the changes you get in Nuxeo DM:

- the Admin Center has a new vertical tab, called **Reporting**;
- A new document type is available in workspaces and sections, called **Report**.

In this section
<ul style="list-style-type: none">• Before you start / Prerequisites<ul style="list-style-type: none">• Nuxeo DM• BIRT designer• Nuxeo - BIRT Integration package• Working with BIRT reports<ul style="list-style-type: none">• Setting up the BIRT report data sources• Creating a report parameter• Sample BIRT Reports

- Working with reports models and reports
 - Report models
 - Creating a report model
 - Editing a report model
 - Making a report model available
 - Reports
 - Creating a new report
 - Editing a report
 - Managing access to the report
 - Generating a report
- Parameters

Related resources

Check out the [Nuxeo – BIRT integration screencast](#) to get an overview of the package's features.

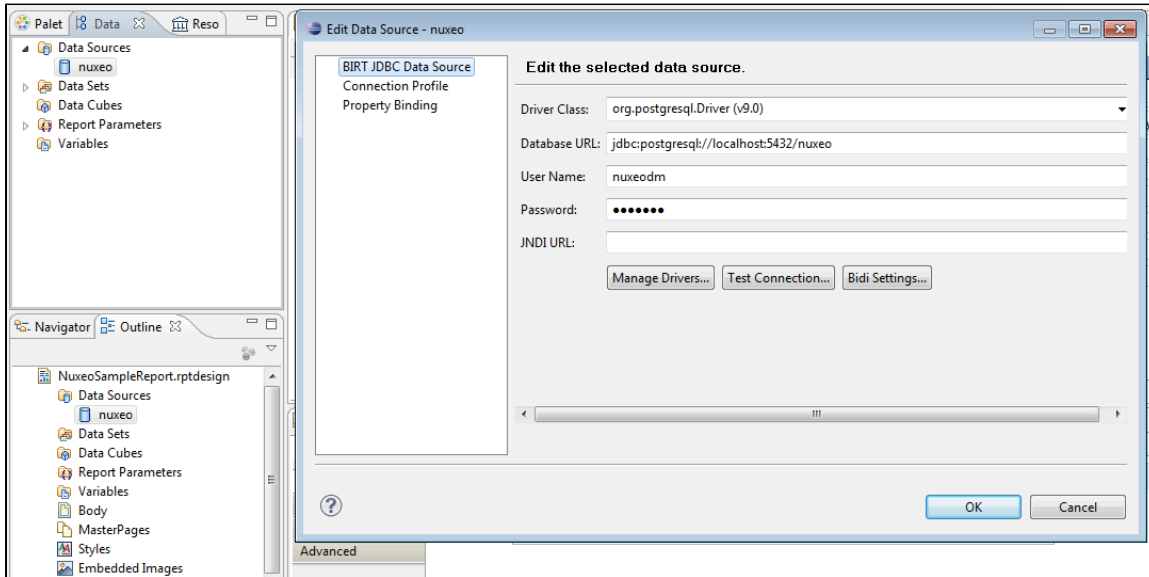
Working with BIRT reports

This section is about what needs to be changed in the BIRT configuration to have report files that can be imported successfully in Nuxeo DM. For information about how to create reports in BIRT and its features, you can report to the tutorials, FAQ and examples from the [Eclipse BIRT website](#).

Setting up the BIRT report data sources

To automatically use Nuxeo DM data sources, the data sources you define in your BIRT report should follow a name convention. You have two possibilities:

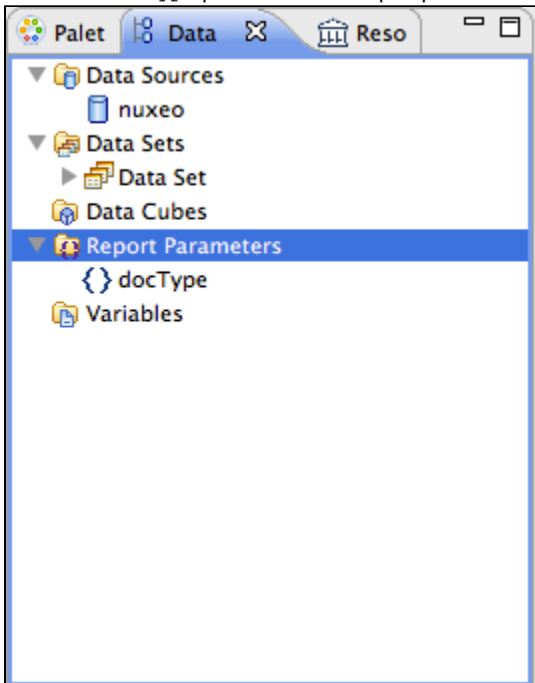
- `nuxeo:` in Nuxeo DM, the JDBC URL of the data source will be replaced by the one from the context document where you've created your BIRT Report document instance.
- `nuxeo-repositoryName:` in Nuxeo DM, the JDBC URL of the data source will be replaced by the JDBC URL of the data source related to the 'repositoryName'. This name convention is the one to be used in a multi-repository configuration.



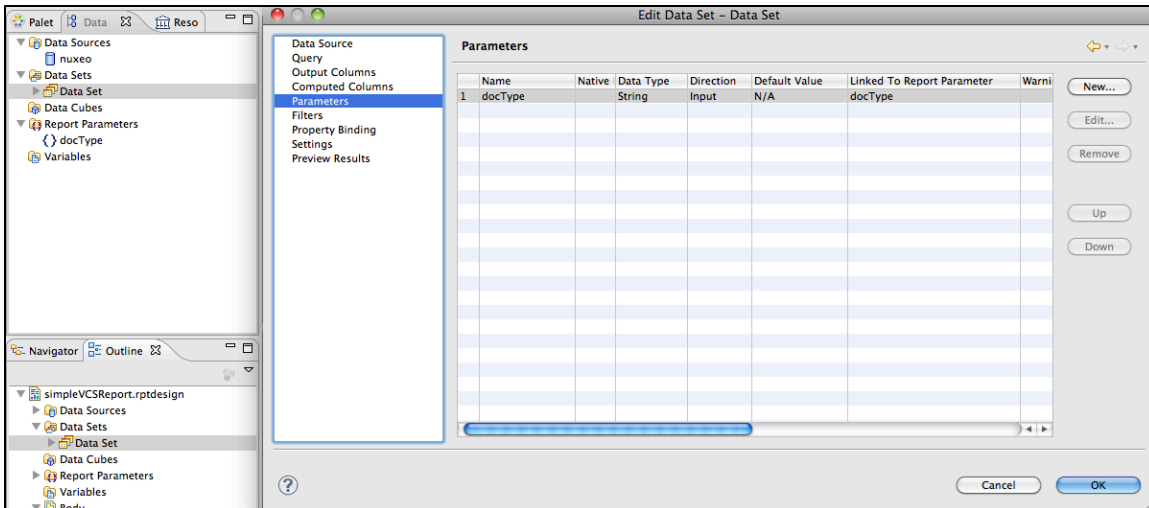
Creating a report parameter

To create a report parameter:

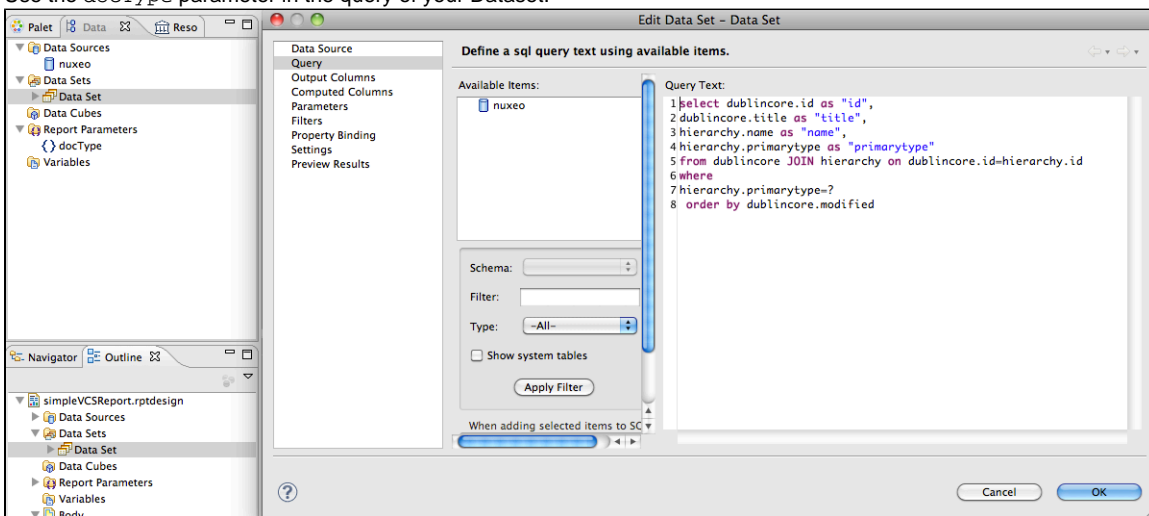
1. Define the `docType` parameter as a Report parameter:



2. Define the `docType` parameter as a parameter of your Dataset, link it to the report parameter:



3. Use the `docType` parameter in the query of your Dataset:



Sample BIRT Reports

You will find attached a set of sample reports to get you started: [Sample Reports.zip](#).

Working with reports models and reports

Report models

Reports models can be created and edited by the Nuxeo DM's administrators, from the Admin Center.

The actions available on a report model are:

- edition,
- [access rights management](#).

Creating a report model

Report models are managed (ie created, edited, deleted) from the Admin Center. As a consequence, only the administrators of Nuxeo DM can create new report models. After you installed the Nuxeo - BIRT Integration package, a new section is available in the Admin Center, called **Reporting**.

To create a report model:

1. Click on the **Create Model** button.
2. Fill in the form (see below for more information on the different fields available).

3. Click **Save**.
The report is saved and its **Summary** tab is displayed.
The report model is accessible only by administrators for now. You need to make it available to non-administrator users so that they can create reports based on it.

Field	Description
Title	Type a title for the report model. Note that if the BIRT file has a title in metadata, this title automatically overwrite your title.
Description	Optionally you can type a text explaining what the model is about.
Content	Select the BIRT report file (.rptdesign) to use for the model.

Editing a report model

When you edit a report model, you can change all the information you filled in on the creation form, but you can also set a parameter. If you set a parameter on the model, it will be set up by default on the report based on the model and users won't be available to change it. See the [parameters](#) section below.

Making a report model available

By default, report models can be accessed by administrators only. So, they need to give access rights on the report models to non-administrator users. The access rights available on report models are [the same as in workspaces](#). The access rights on report models are managed the same way as on any other space. You can report to the [Access rights management page](#) of the [Nuxeo DM User Guide](#) for precise steps.



On a default Nuxeo DM configuration, members inherit **Read** right automatically on report models. So you don't need to specify access rights on the model: users with **Write** right will be able to create reports on the model.

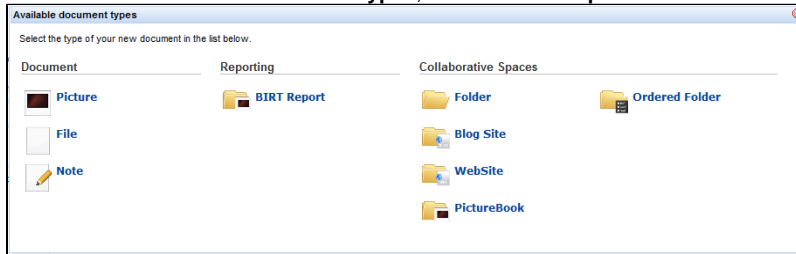
Reports

Reports are available in workspaces and folders. They can be created by users with **Write** right, who choose which model to use and have the possibility to define some parameters as frozen. Users with **Read** right can generate the report and see the updated computed results.

Creating a new report

A BIRT report is created as any other document in Nuxeo DM.

1. In the **Content** tab of the workspace, click on the **New** button.
2. On the window **Available document types**, click on **BIRT Report**.



3. Fill in the report's creation form.
4. Click on the **Create** button.
The **Preview** tab of the report is displayed.
You can now either:
 - [generate the report](#) from the **Preview** tab,
 - [edit it to set up some parameters](#) for users who will generate the reports,
 - [manage the access to the report](#).

Report properties

Field	Description
Title	Give the report a title.
Description	Optional text indicating what the report is about.
Report Model	Model used by the report.
Report key	The report key is used to generate the report. By default, it is automatically generated by the system when you create the report, but you can edit it afterward.

Editing a report

The steps to edit a report are the [same as for a default document of Nuxeo DM](#). When you edit a report, you can modify its properties and you can set up some parameters. The parameters you set in the **Edit** tab are not displayed on the **Preview** tab anymore. Their value is set for all users for the report generation.

Managing access to the report


Unlike for notes and files (which are the most common default Nuxeo DM documents), users can manage the access to the BIRT reports. The report access rights are inherited from the workspace or folder it's created in. You can [grant or deny access rights](#) on the report just like on a workspace or a section.

Generating a report

Generating a report means filling in the available parameters on the report's **Preview** tab with values meeting your criteria and getting the results. By default, the report is generated in HTML in the **Preview** tab of the report. However, you can also generate the report in PDF format from this URL: http://localhost:8080/nuxeo/site/reports/REPORT_KEY/pdf . The REPORT_KEY can be found in the **Summary** tab of the report.



Instead of the Report Key metadata, you can use the report ID. To know the ID of the report:

1. Click on the icon  .
The page is reloaded using a new URL.
2. In the URL, copy the ID of the document, which is between default/ and /view_documents?. In this example URL, the ID is in bold: "http://localhost:8080/nuxeo/nxdoc/default/**e1f6d76f-405b-43d1-bb36-f7d8cd4068ba**/view_documents?tabId=&conversationId=0NXMAIN".

If no parameter is left to be filled in by the user, the report is generated when you click on it to consult it.
For more information about the parameters, see the [parameter section](#)

Parameters

Reports are generally based on parameters whose values can be set by users so as to computer the report. Parameters values can be defined at

three places:

- on the report model Edit tab;
- on the report Edit tab: Only the parameters which are not set into the report model can be set here;
- on the report **Preview** tab: Only the parameters that are not set on the model or the report itself.

Reports are bound to the document context, which means that there is a set of parameters that will be automatically set from the document context if they are defined in the BIRT report. Those parameters will be filled by the Nuxeo instance when generating a report, and so you can use them when working on your BIRT report:

- `${userName}`: the username of the current user asking for the BIRT Report;
- `${docType}`: the document type of the BIRT Report (BirtReport);
- `${currentPath}`: the path of the BIRT Report document in Nuxeo DM;
- `${currentRepository}`: the repository name where the report is stored;
- `${currentSuperSpacePath}`: the path of the first parent of the report that is a super space (ie that has the superspace facet). By default, workspaces and domains are super spaces.
- `${currentSuperSpaceId}`: the ID of the first parent of the report that is a super space (ie that has the superspace facet). By default, workspaces and domains are super spaces.
- `${currentWorkspacePath}`: the path of the first parent workspace of the BIRT report;
- `${currentWorkspaceId}`: the ID of the workspace the report is in;
- `${currentDomainPath}`: the path of the first parent Domain of the report;
- `${currentDomainId}`: the ID of the domain the report is in.

Nuxeo Polls

The Nuxeo Polls package enables Nuxeo DM users to create surveys and have a visual overview of the results. To make polls visible to users without making them find them, they are displayed to users in the left column of the page, below the Worklist. This way, open polls are always displayed to the user so he can vote on it at anytime.

On this page

- [Installation](#)
- [Creating a new poll](#)
- [Defining who can participate to the poll](#)
- [Opening a poll](#)
- [Closing a poll](#)
- [Participating to a poll](#)

Installation

There are no specific requirements to install the Nuxeo Poll package. You can [install it from the Marketplace](#) or [from the Admin Center](#). To check that the Nuxeo Poll package was correctly installed, browse Nuxeo DM with the Administrator user: you can see that workspaces, sections and templates now have an additional tab, called **Polls**.

Creating a new poll

Poll can be created only in spaces that have the "SuperSpace" facet. On a default Nuxeo DM, this means workspaces, sections and templates. Only users with Manage everything right in these spaces can access the **Polls** tab and so create new polls.

To create a new poll:

1. On a workspace, section or template, click on the **Polls** tab.
2. Click on the **Create a new poll** button.
3. Fill in the creation form and click on the **Create** button.
The poll is created. Depending on the start date you selected, the poll is immediately started or not:
 - if the start date is the current date, the poll is immediately started and users can start voting;
 - if the start date is after the current date, the poll is not started immediately. Users don't see it yet. The poll will start automatically when the starting date is reached. Or you can start the poll before by clicking the **Open it** link in the **Poll status** box.

Poll parameters

Field	Description
Question	Type the question users will be answering.
Description	Type an optional text that explains why you do this poll for instance. This description is not displayed to users in the poll widget.
Answers	Click on Add and type the first possible answer in the displayed text box. Repeat this for each choice users will have.
Start Date	Select the date from which the poll should be available to users.
End Date	Select the date at which the poll will close.

Defining who can participate to the poll

Polls are created in workspaces and sections. By default, the same access rights are applied on the poll as on the space in which they are created. This means that by default the poll is displayed to the users that have access to the workspace or the section. However, you may want to address more users, or on the contrary only a specific population of users. You can [manage the access rights](#) on the poll directly. To be able to participate to the poll, users just need to have Read access to it. It is then automatically displayed to them on the left column of pages below the worklist, until they vote on it or the poll ends.

Opening a poll

When you create a poll, you can indicate when the poll should start. If you select the current date as the starting date, the poll is immediately "Open" and available to users. However, if you select a future date, the poll is "In project" and is not displayed to users yet. In that case, the poll will automatically be opened by the system when the start date is closed. If you haven't selected a start date, you can open the poll manually at any time by clicking the **Open it** link in the **Poll status** box on the **Summary** tab. The poll is then started and displayed to users.

[Back to polls listing](#)

Poll status **Project** [Open it](#)

This document is **unlocked** | [Lock](#)

Metadata

Question	Are you satisfied with your summer holidays?
Description	
Answers	<p>Yes, it was awesome!</p> <p>No, it was really bad</p> <p>I never take holidays</p>
Start date	
End date	

Closing a poll

Just like you indicate when the poll should start, you can also select an end date. In that case, your poll will automatically close when the end date is reached. If you haven't selected an end date, you can close it manually at any time by clicking the **Close it** link in the **Poll status** box on the **Summary** tab.

The poll results are now displayed on the poll Summary tab. Users cannot vote on the poll, which is not displayed in the poll widget in the left column.

Are you satisfied with your summer holidays?

Summary [Edit](#) [History](#) [Manage](#)

Poll temporary results

[Pie chart](#)

Are you satisfied with your summer holidays?

Yes, it was awesome! (75%)
No, it was really bad (25%)
I never take holidays (0%)

Total votes: 8

[Back to polls listing](#)

Poll status **Open** [Close it](#)

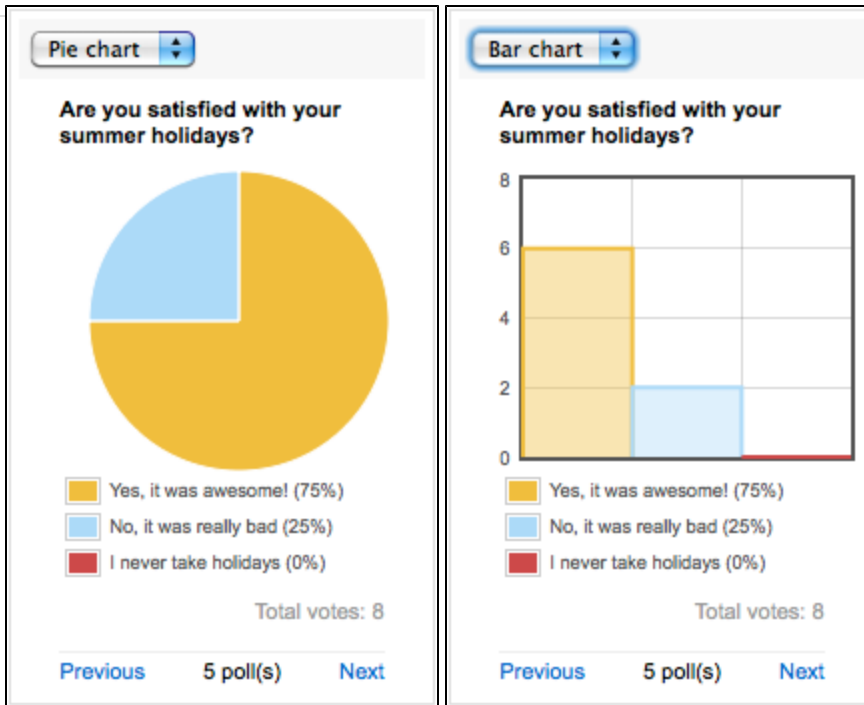
This document is **unlocked** | [Lock](#)

Metadata

Question	Are you satisfied with your summer holidays?
Description	
Answers	<p>Yes, it was awesome!</p> <p>No, it was really bad</p> <p>I never take holidays</p>
Start date	9/2/2011
End date	9/30/2011

Participating to a poll

When a poll is open, it is automatically displayed to users in the left column of pages so they can vote on it. To vote on a poll, select your answer and click on the **Cast vote** button. The temporary results of the poll are displayed. The poll is not available anymore for votes or consultation after you browsed another page or logged out. By default, results are displayed as a pie chart. Use the drop down list to display them as a bar chart.



Related topics

[Installing a Marketplace package](#)

[Access rights management in Nuxeo DM](#)

Validator resolved by permission workflow

The Validator resolved by permission workflow package adds to your Nuxeo DM application a simple validation workflow. This workflow is available for files and notes, which can be approved in a click by the users who have the "validate" permission on the document. This new permission can be set at the workspace level.

There are three simple steps to use this workflow:

Step 1: Give "validate permission"

The workflow validation permission package automatically add a new permission in the list of access rights available on workspaces. This validate right is included in the "Manage everything" right. However you may need to [give this right](#) to users who just have "Write" right on workspaces.

Content Edit Alerts History Manage

Access rights Theme Alerts Publication targets Trash

Inherited rights

Type	Username	Granted permissions	Denied permissions
	Clark Kent	Manage everything	
	Administrator	Manage everything	
	members	Read	

☐ Block permissions inheritance

Local rights

No local rights are defined on the current document

Add a new security rule:

Search for users or groups

To start the search, please type at least 3 character(s)

Sheldon Cooper

Action

Grant

Permission

Read
Read
Write
Remove
Version
☒ security.permission.validateWorkflows
Manage everything
Comment
Moderate

Step 2: Submit documents to validation

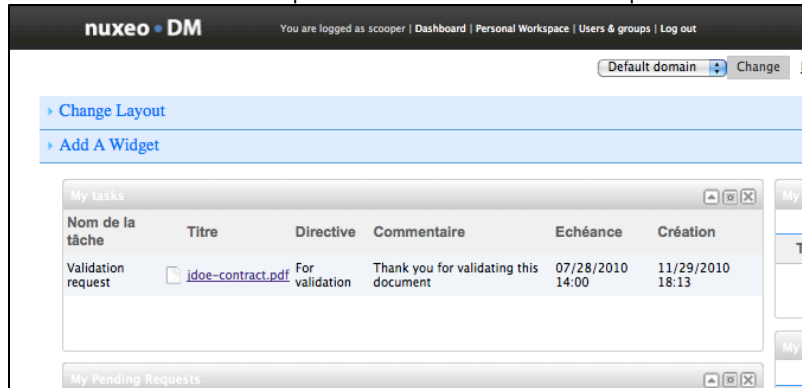
Users need at least "Write" right to be able to submit a document to validation. To submit documents to this one step validation workflow, users

just need to click on the icon , displayed on the right of the breadcrumb.

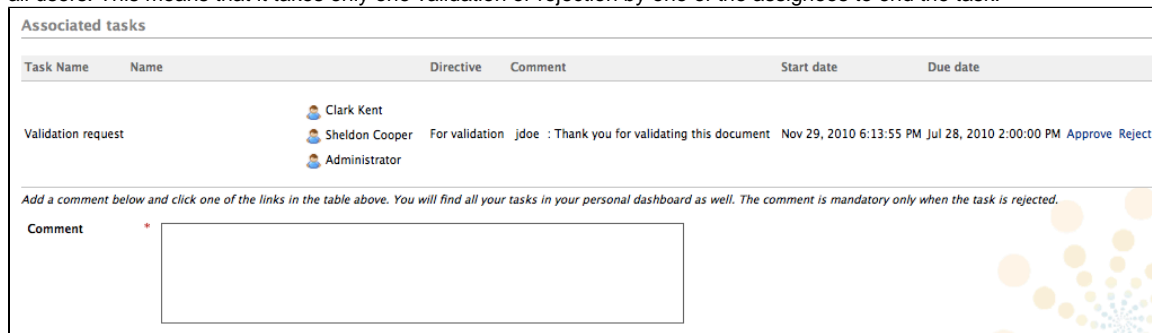
The document is immediately submitted to validation with an automatic comment "Thank you for validating this document". Users that have the "validate" permission in the document's workspace have a validation request displayed on their dashboard.

Step 3: Validate submitted documents

Users that have the "validate" permission in the document's workspace all have a validation request task displayed on their dashboard.



When they go on the document, at the bottom of the "Summary" tab, an **Associated task** section is displayed. There is a single validation task for all users. This means that it takes only one validation or rejection by one of the assignees to end the task.



To reject the document, a validator types a comment in the text area below the task and clicks on the **Reject** link. The task is automatically ended. The rejection is logged in the document's history.

To validate the document, a validator clicks on the **Approve** link. The task is immediately ended and the validation is logged in the **History** tab.

RELATED TOPICS

[Implement a one step validation workflow with Studio](#)

[Manage access rights in Nuxeo DM](#)