Nuxeo Document Management 5.3.2

User Guide

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Nuxeo DM 5.3.2 User Guide

About Nuxeo DM

Nuxeo DM is Nuxeo's collaborative document management application, based on our open source ECM platform Nuxeo EP. Nuxeo DM provides organizations with the application they need to enable their teams to work more efficiently either on a project-basis or on longer term business processes.

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.

You can come and discuss Nuxeo DM with other users on our discussion forum.

Nuxeo DM User Guide

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Nuxeo DM's concepts

Nuxeo DM is Nuxeo's collaborative document management application. It distinguishes collaborative work and content distribution.

The general concept is here : 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 When obsolete, they're unpublished from sections.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.

Available spaces

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. Sections are . Publish ing 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 2 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 right 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
Write	Create documents Edit documents Add / remove relations Start a workflow + read actions	Create sections + read actions
Manage	Manage access rights Set alerts to other users Apply a preset look on documents Manage deleted documents + write and read actions	Manage access rights Set alerts to other users Apply a preset look on documents Manage deleted documents + write and read actions
Remove	Delete documents	
Can ask for publishing		Submit documents for publishing
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 DM 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 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.

Browsing content in Nuxeo DM

To help you find accurate documents, Nuxeo DM 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 or advanced search.

For each of the available means to access documents, you can customize the informations displayed.

Access content

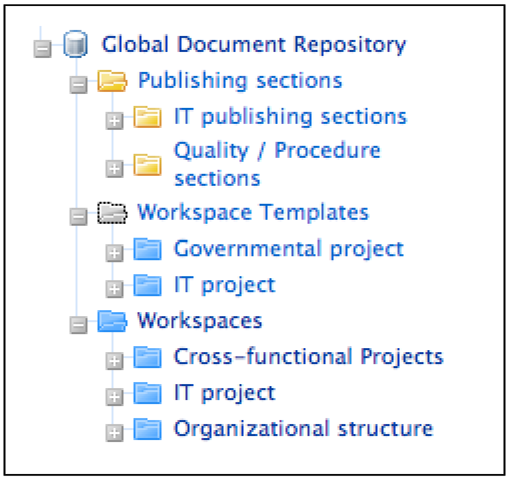
There are different ways to access content in Nuxeo DM. You can either use one of the navigation trees available, the tag cloud or your dashboard.

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

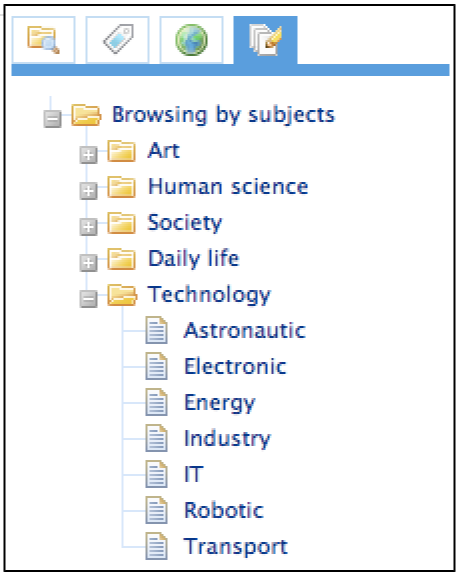
The default navigation tree displayed on the left hand side of the pages is the folders navigation tree. It displays all the domain structure from the root. It enables you to easily access any space in the application structure.



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 you organzation'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.

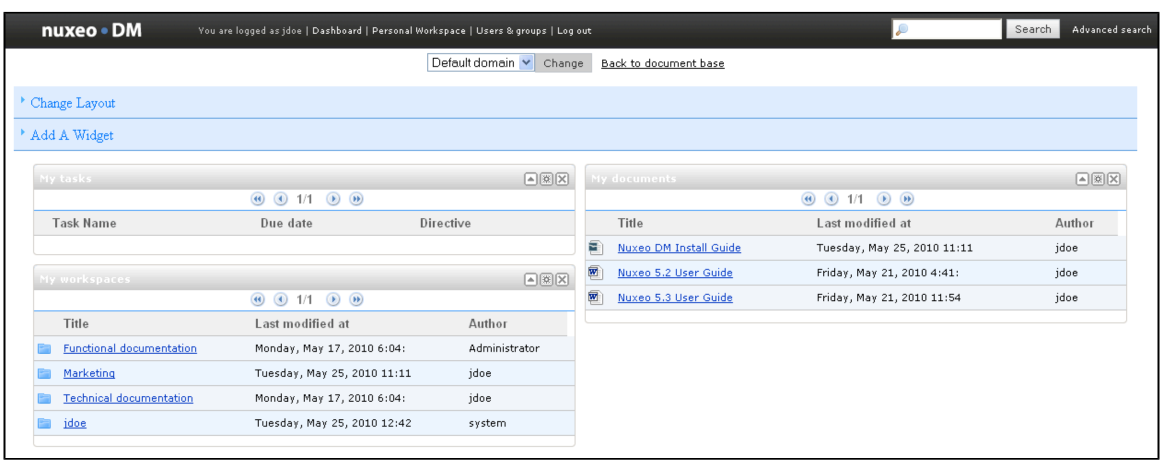
Tag Cloud

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.

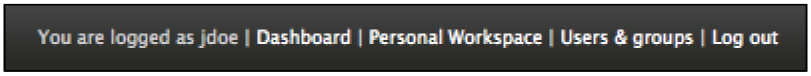
To see all documents tagged with the same label, click on the tag in the tag cloud.

Dashboard

You can also access documents using your dashboard.
Every user has a dashboard that he can customize. The purpose of the dashboad is that the user can have a summary of the application's activity on one page.



To access your dashboard, click on the **Dashboard** link in the page header.



Change content presentation

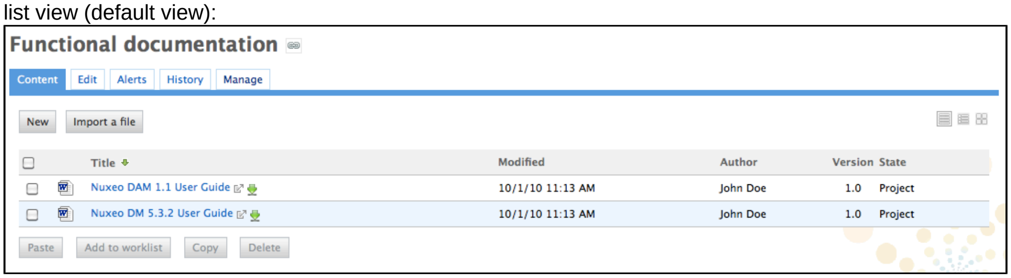
You can change the way content is presented:

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

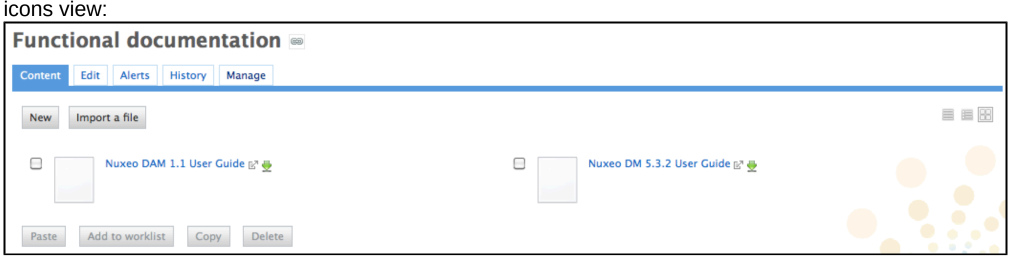
Presentation options in folders

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

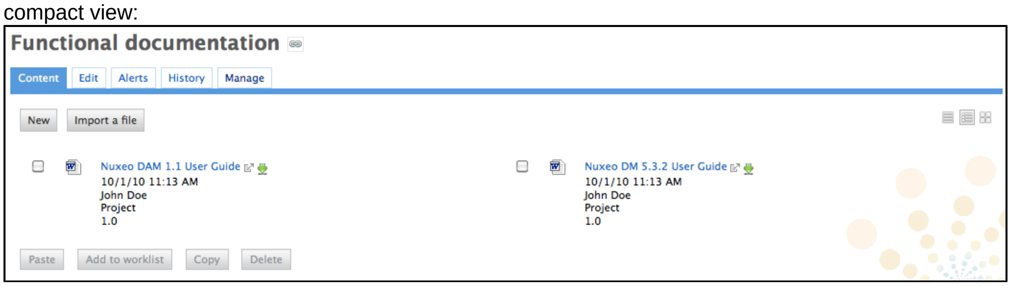
- list view (default view):



- icons view:



- compact view:



To change presentation, click on one of the icons displayed on the top right corner of **Content** tab:

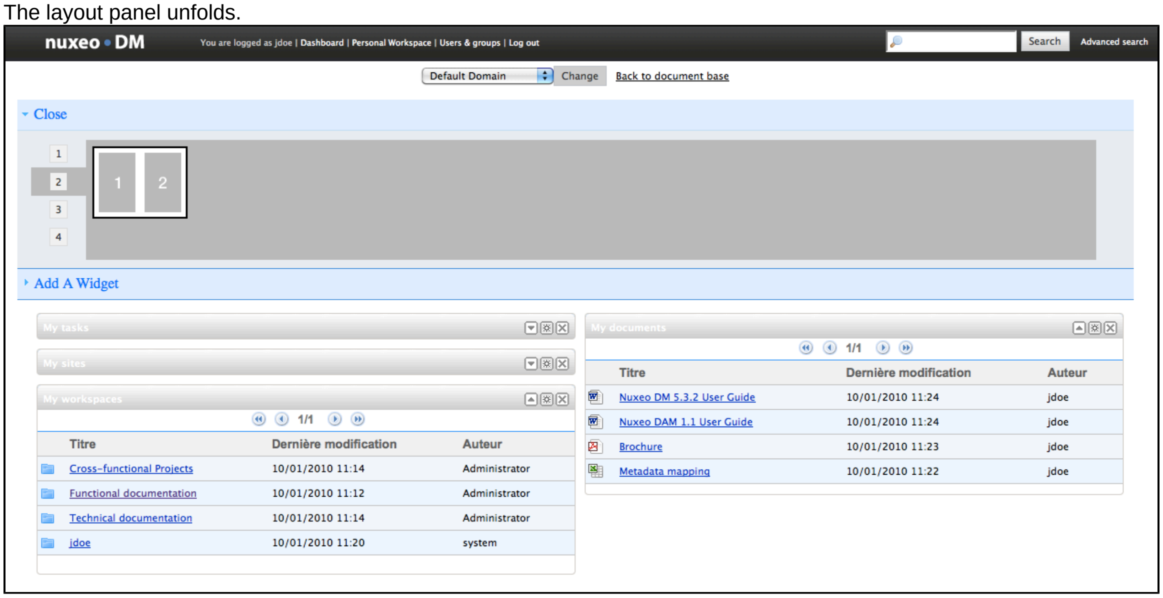
- list view icon: 
- icon view icon: 
- compact view icon: 

Customize your dashboard

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

Change dashboard layout

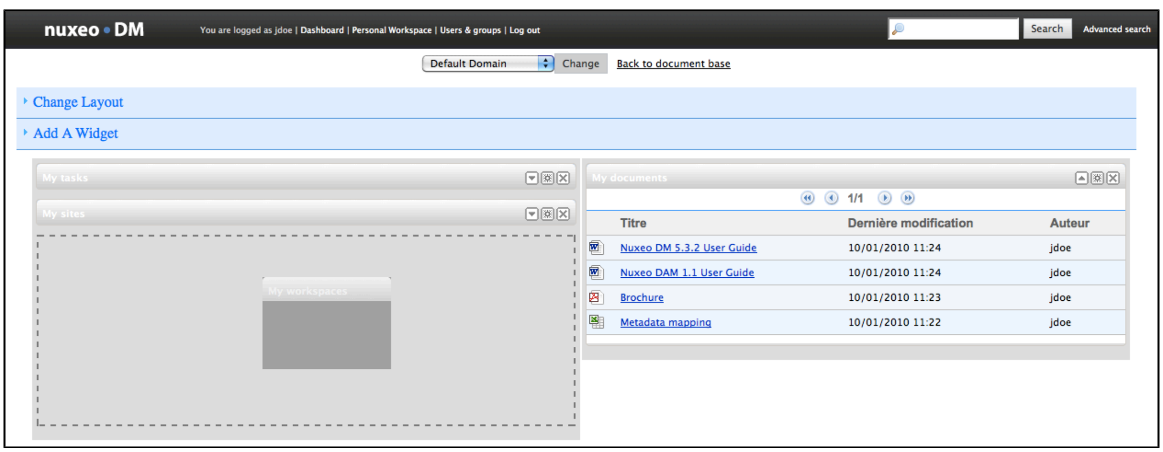
To change your dashboard's layout:

1. Click on **Change layout**.
   The layout panel unfolds.
   

2. Click on the layout you want to apply for your dashbord.
3. Click on **Close**.
   The chosen layout is immediately applied.
   Now you can reorganize your widgets in this layout.

Organize 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.

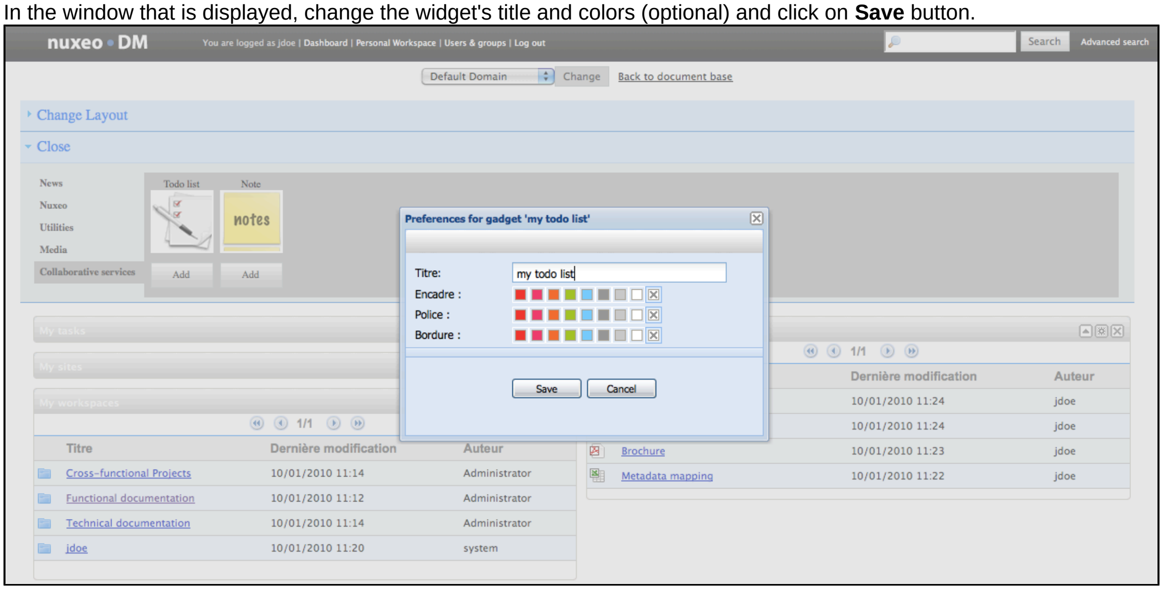
Add and remove widgets

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

Add widgets

To add a widget:

1. Click on **Add a widget**.
2. Click on the **Add** button of the widget you want to display on your dashboard.
3. In the window that is displayed, change the widget's title and colors (optional) and click on **Save** button.



4. Move the widget in the dashboard at the place you want it to be displayed.

Remove widgets

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.

Edit widgets

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

To edit a widget:

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

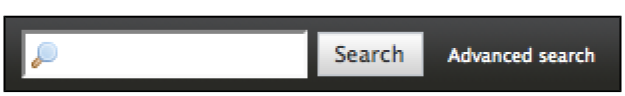
Search Nuxeo DM

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

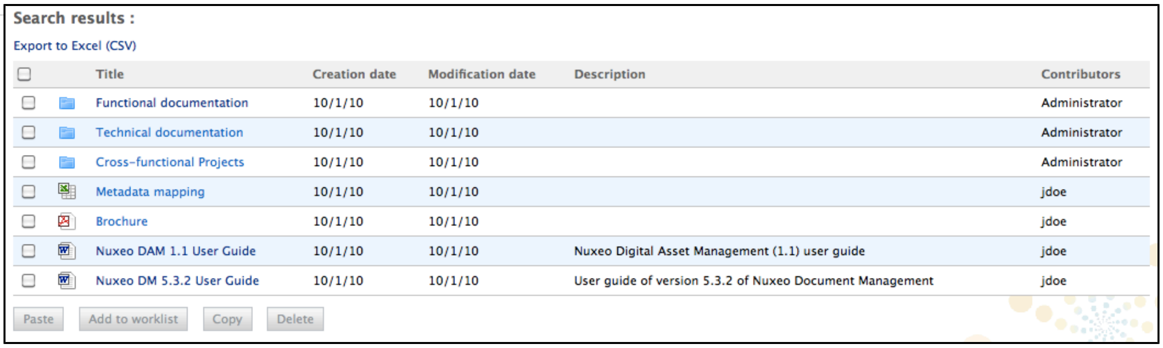
Documents are indexed using their title, description, content (note field, attached files), and metadata.

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 and clicking the **Search** button.



Search results are displayed in a table. Click on the document's name to open it.


Search results :

Export to Excel (CSV)

	Title	Creation date	Modification date	Description	Contributors
	Functional documentation	10/1/10	10/1/10		Administrator
	Technical documentation	10/1/10	10/1/10		Administrator
	Cross-functional Projects	10/1/10	10/1/10		Administrator
	Metadata mapping	10/1/10	10/1/10		jdoe
	Brochure	10/1/10	10/1/10		jdoe
	Nuxeo DAM 1.1 User Guide	10/1/10	10/1/10	Nuxeo Digital Asset Management (1.1) user guide	jdoe
	Nuxeo DM 5.3.2 User Guide	10/1/10	10/1/10	User guide of version 5.3.2 of Nuxeo Document Management	jdoe

Paste | Add to worklist | Copy | Delete

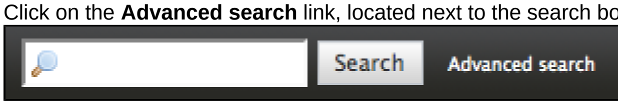
Nuxeo DM search engine uses boolean operators, to enable you to associate keywords. The Boolean operators used by Nuxeo DM search engine are:

- +: 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 document 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, choose your sorting criteria.
4. Click on the **Search** button.
   Search results are displayed in a table. Click on the document's name to open it.

Search results export

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

When you export search results as an Excel document, 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 **Export Excel** link, located above the search result table.

Search results customization

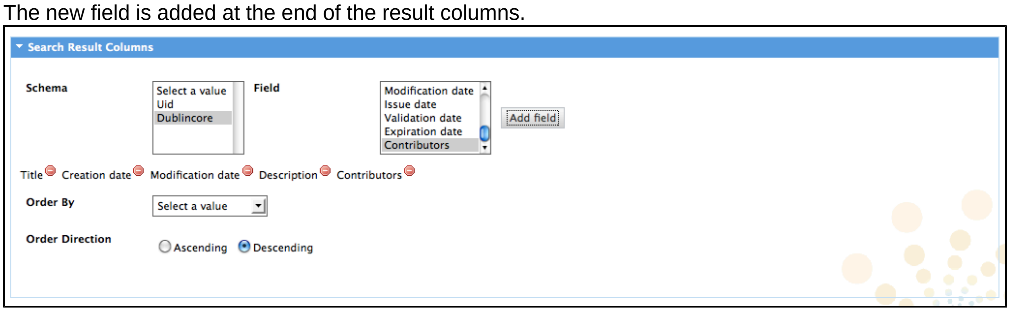
You can choose which informations are displayed on the results page. The default informations are the document's title, its creation date and its modification date. You can add or remove fields from search results display.

All users can customize search results columns.

Adding new search results columns

To add a new search results column:

1. 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.


2. Select a schema.
   - The Uid schema includes versioning informations.
   - The Dublincore schema includes metadata informations.
   The fields corresponding to the selected schema are displayed in the **Field** selection list.
3. Select the field to add and click on the **Add field** button.
The new field is added at the end of the result columns.


Removing search result columns

To remove a column, click on the icon after the column name.

Moving search result columns

You can move the search results columns to modify their order. To move a column, drag it and drop it on the column at the place of which you want it to be. For instance, from the screenshot above, if you want the Description column to be the second one in the table, drag it and drop it on the Creation date column. The Description column replaces the Creation date column, and the Creation date column takes the place of the Description one.

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, 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.

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 ans share information with the other users.

Working with workspaces

There are two types of workspaces:

- *collaborative workspaces* are 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.

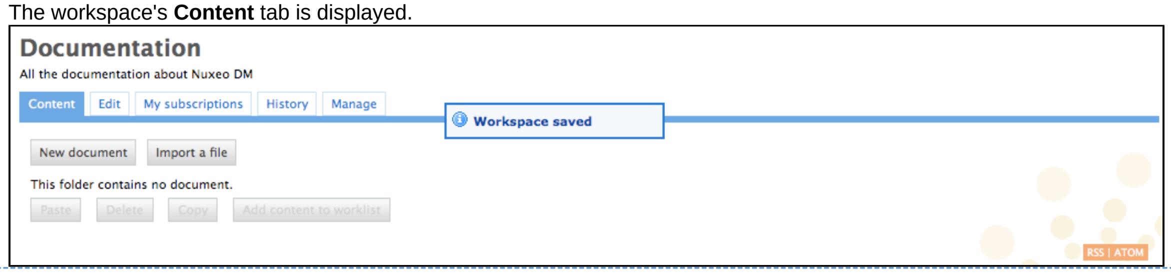
Workspaces can be created from scratch or from a template.

Create 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.



Create 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.

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.

To edit a workspace:

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

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.

Manage 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)

Manage deleted documents

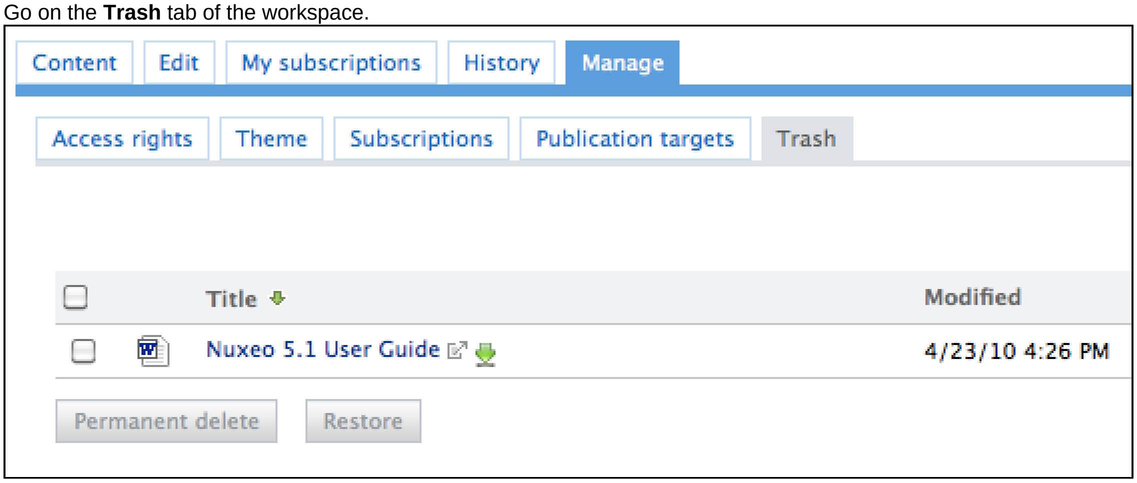
When they are deleted by users with writing rights, documents are moved into the **Trash** tab of the parent folder (domain, workspace, folder, etc). They are not erased from the application. Users with management rights can still restore them or delete them permanently.

Restore 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.
   

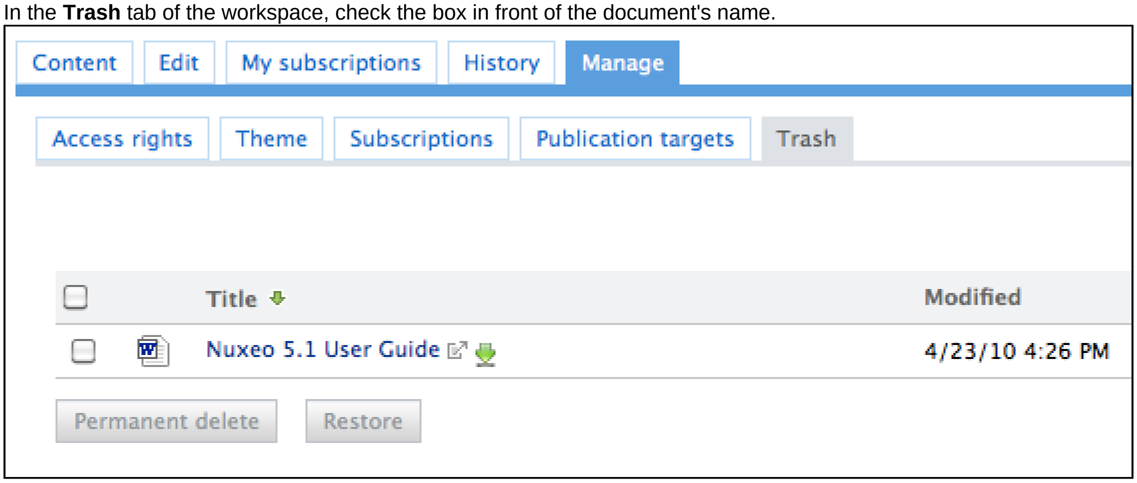
2. Check the box in front of the document's name.
3. Click on the **Restore** button.
4. On the window that pops up, click on the **OK** button.
   The document is moved back into the **Content** tab of the workspace.
   It takes the 'project' life cycle state, even if its life cycle state before deletion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

Permanently delete 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.



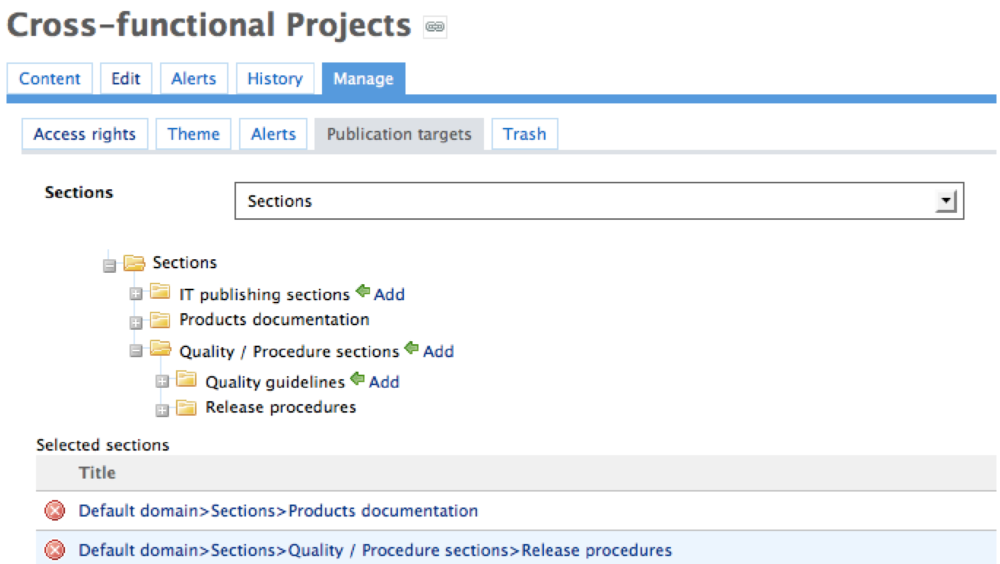
2. Click on the **Permanent delete** button.
3. On the window that pops up, click on the **OK** button.
   The document is permanently erased from the application. It cannot be restored.
   The relations from and to the deleted document are updated and are displayed as a URI relation: the deleted document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

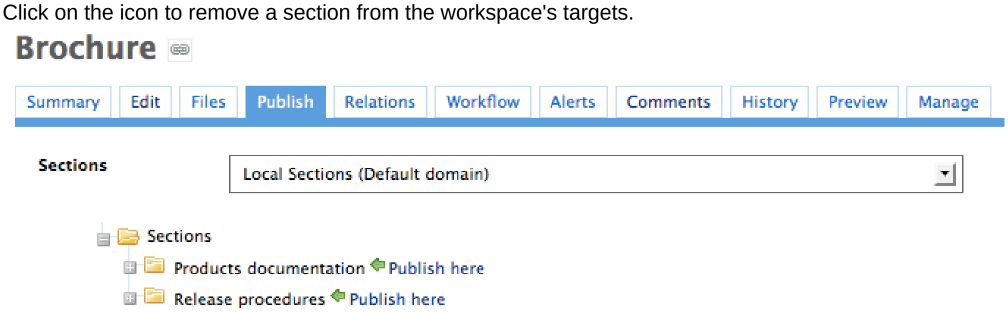
Set publication targets

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.
   

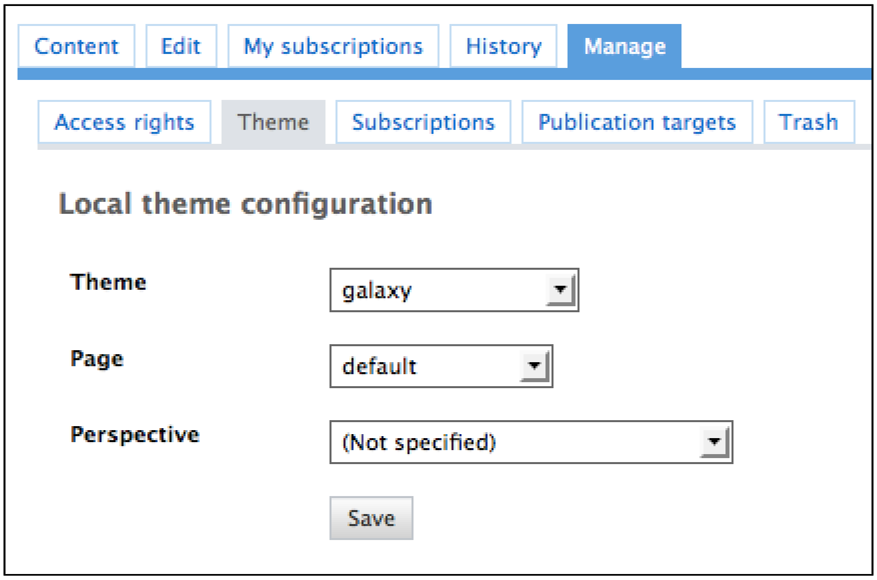
Apply preset look to a space

Administrators 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.

> 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 visualisation 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 **Theme** sub-tab.


3. Select the theme, page and perspective you want to apply.
4. Click on the **Save** button.
The page is displayed with the selected look.

Working with documents

Nuxeo DM is a collaborative document management application. That is to say that you can 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 Nuxeo DM are:

- the note: a text typed in a rich editor integrated to Nuxeo DM;
- 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.

Create 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 filing the appropriate form (see below),
- use drag and drop from your desktop, to import one or several documents,

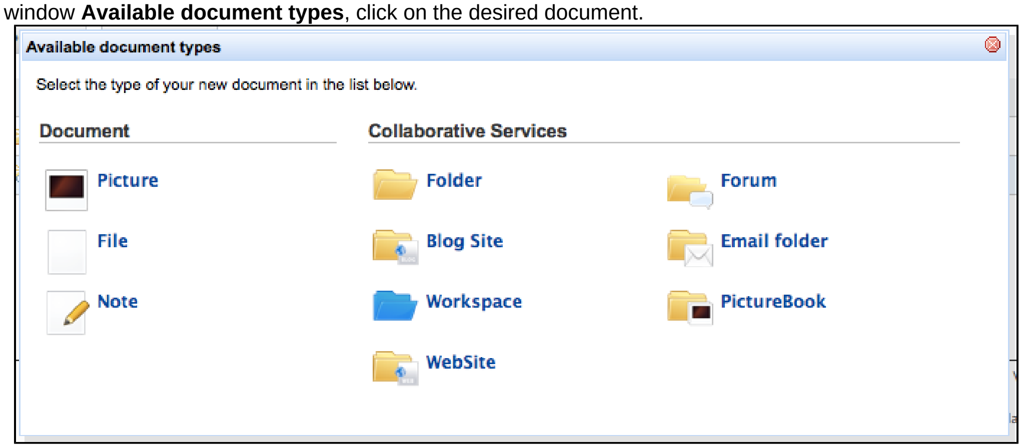
- create documents directly from MS Office or OpenOffice, using Nuxeo LiveEdit extensions.

Create a document using 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 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.

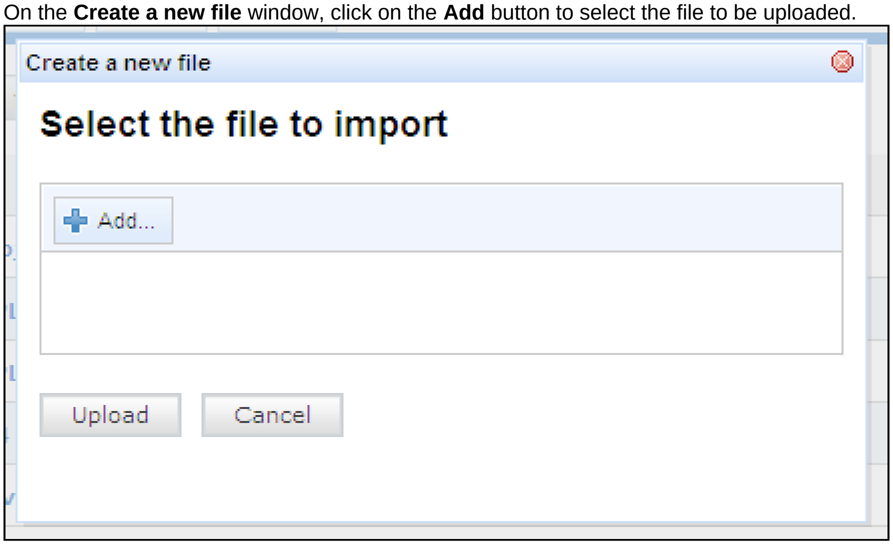
The **Summary** tab of the document is displayed.

Create a document using 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 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.

Edit content

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

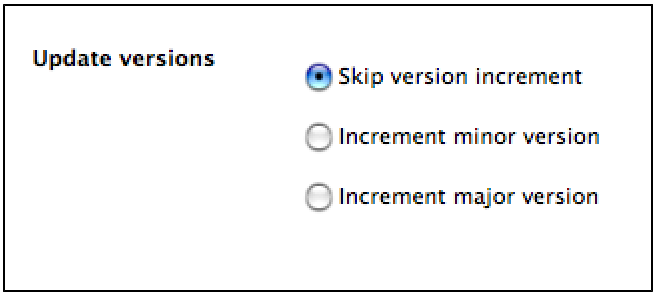
Documents can be edited in workspaces only. If you want to modify a published document, you need to edit it in the workspace and republish it.

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.

Versioning overview

Every time you modify a document, you have to define how the version number is updated.



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 1.0. Major version increment is reserved to significant modifications. Minor version increment is used for secondary changes.

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
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.

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.

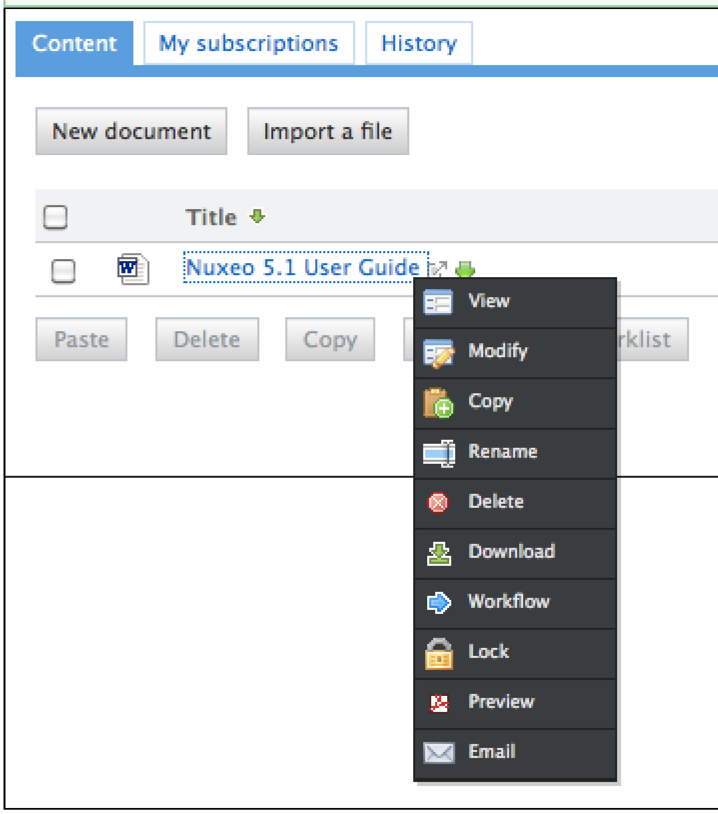
To fill in or change the metadata of the document, just edit the document.

Edit a document

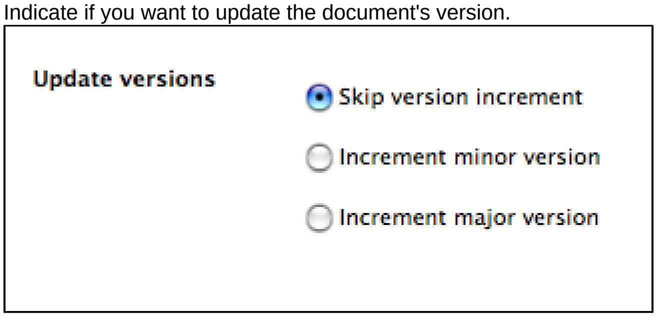
To edit a document:

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 **Edit**.



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

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.

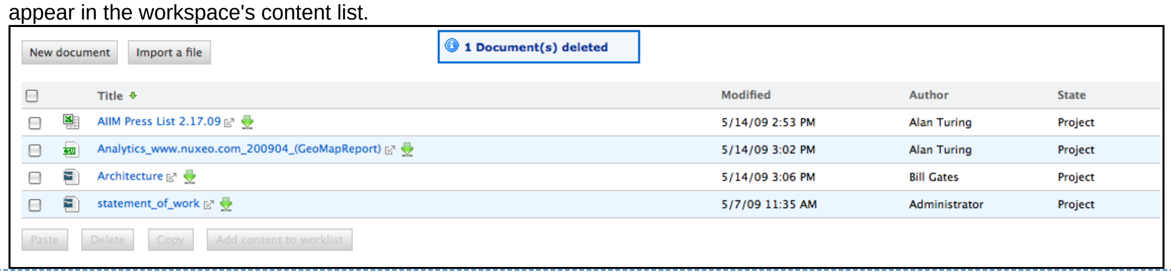
There are two ways to move a document into the **Trash** tab:

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

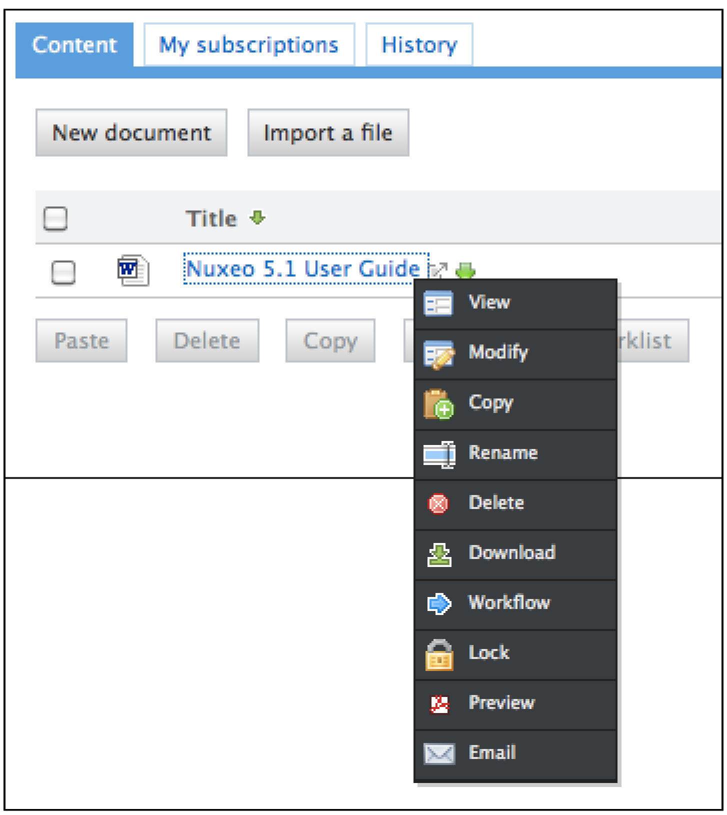
If you are sure that the document is to be deleted, you can delete it from the workspace's content table. However, if you want the deletion to be approved before, you need to submit it to a workflow and specify that the destination life cycle is 'deleted'. When the workflow is ended and the deletion 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.

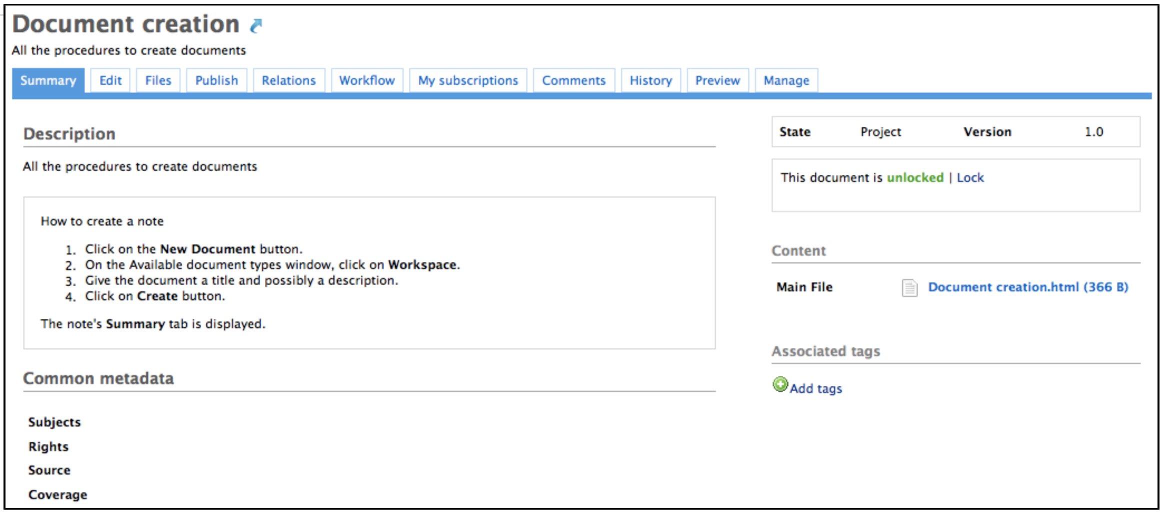


You can also delete documents using right click on document from the **Content** tab of the workspace.

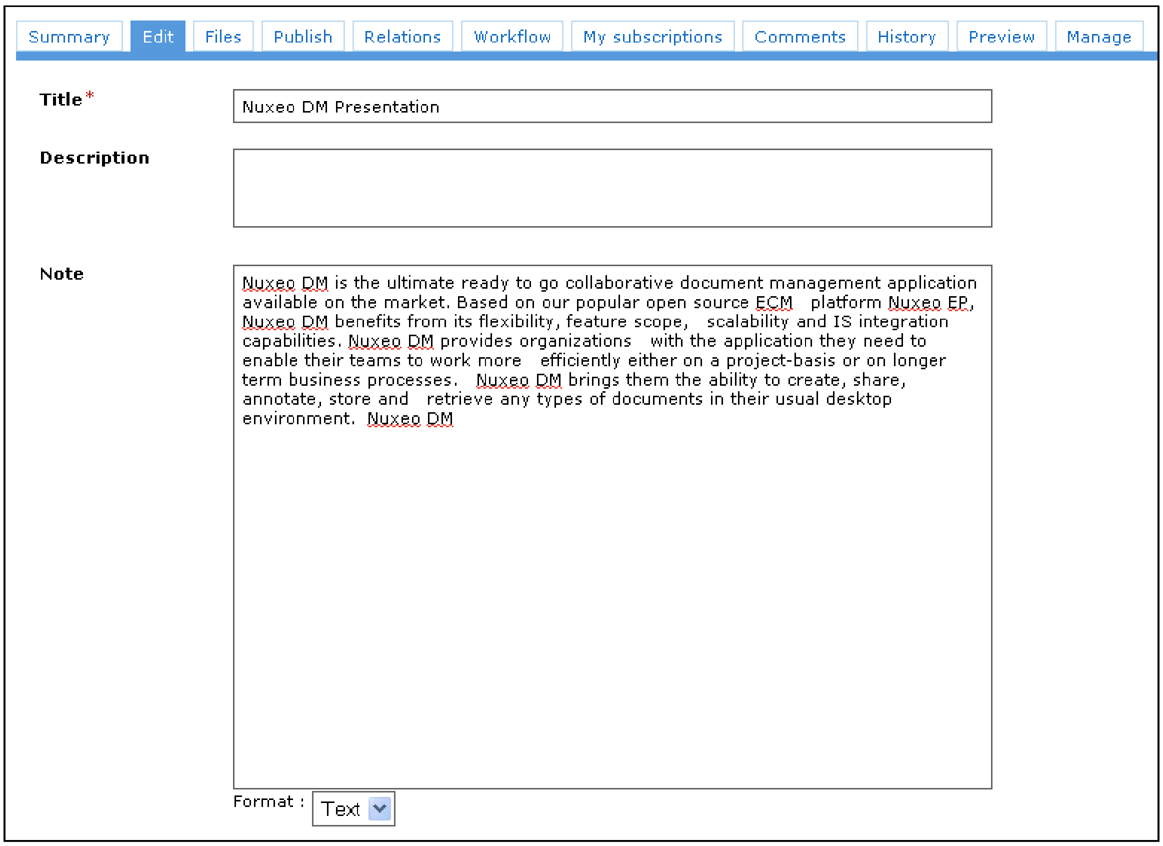


Note

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 associate editor.

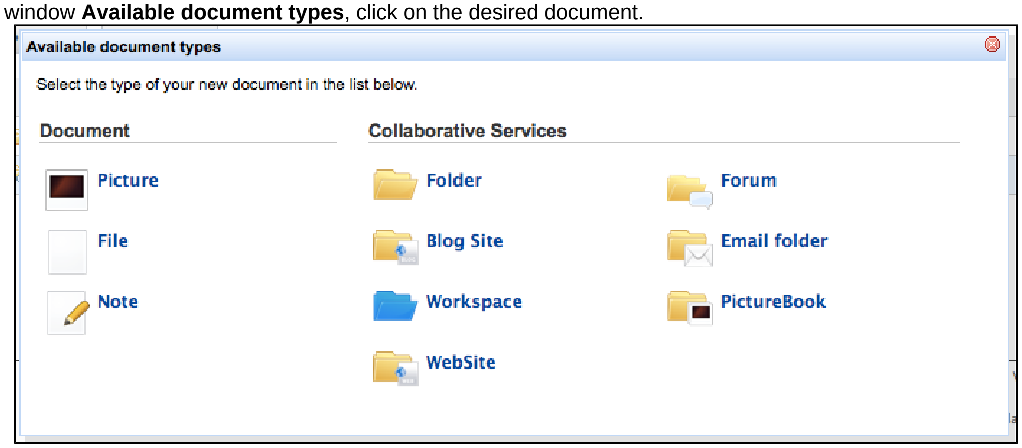


A note is composed of the fields below:

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 Nuxeo DM.

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.

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

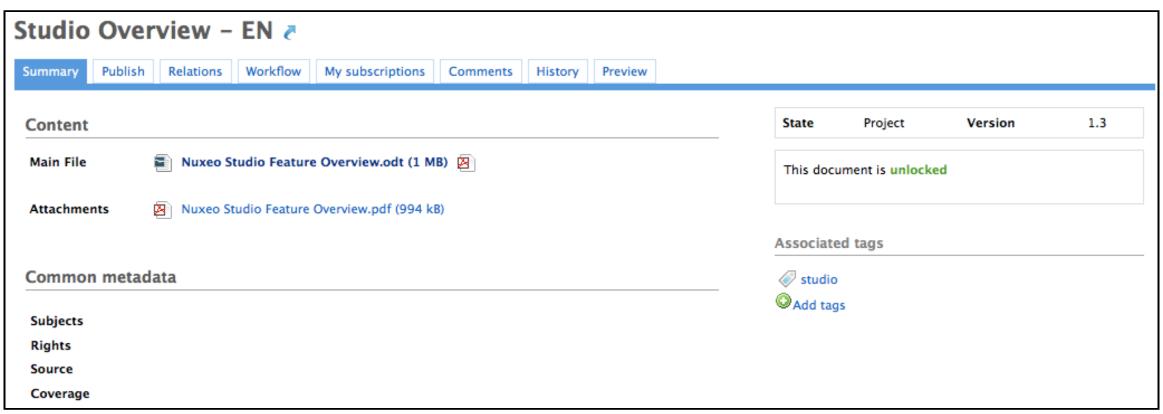
Files

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

You can upload files of any format.

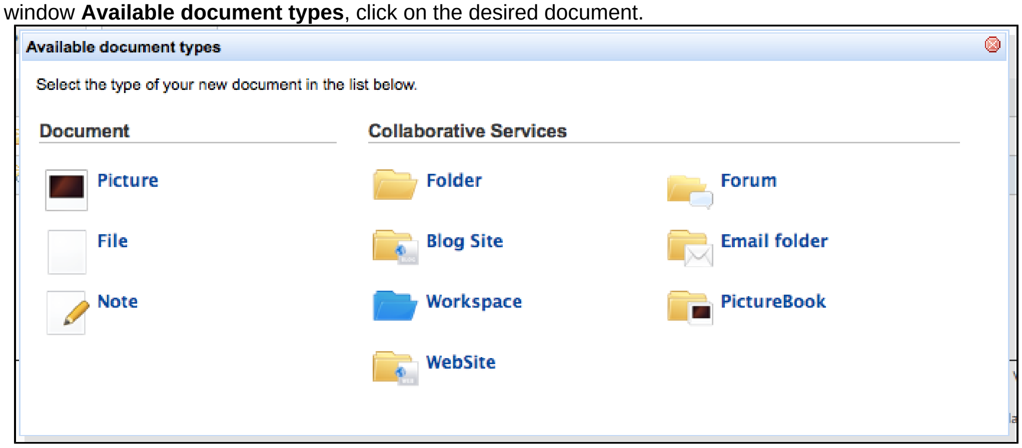
A file is composed of:

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



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).

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 in Nuxeo DM:

- 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 behaviour 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

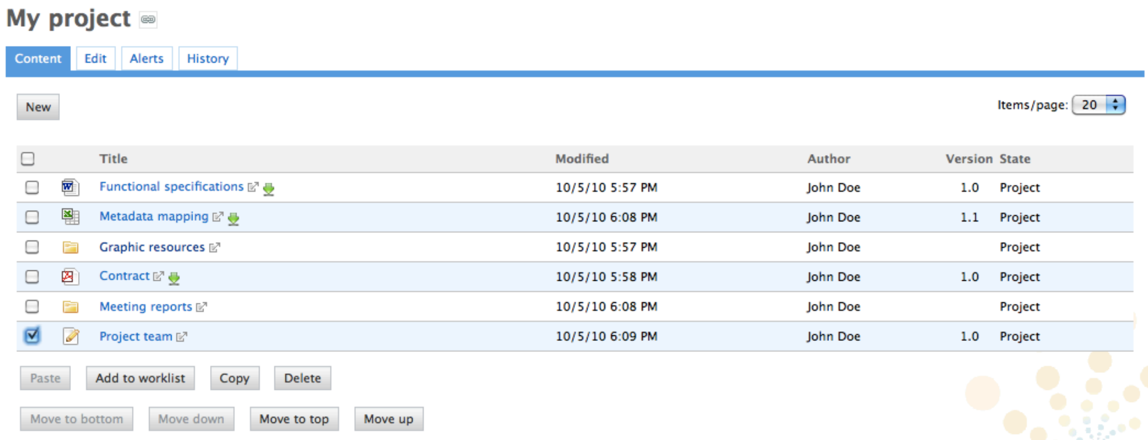
Ordered folders are folders in which you can change the content's order.

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

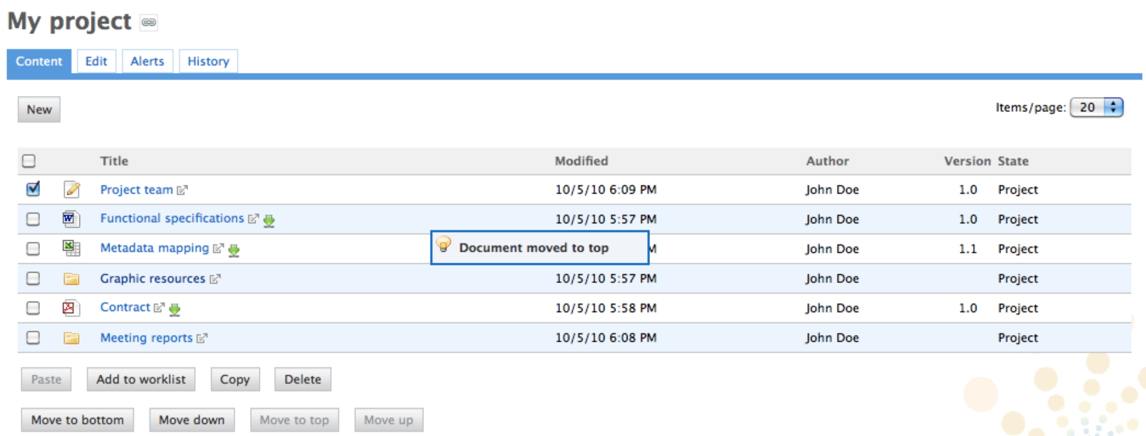
- Move up
- Move down
- Move to top
- Move to bottom

To change the content's order:

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



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



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

Working using drag and drop

Nuxeo proposes an extension to enable drag and drop in Nuxeo DM. Extensions are available for FireFox and Internet Explorer.

Nuxeo D&D extension enables you to:

- import documents or folders using drag and drop
- moving documents in Nuxeo DM
- publish documents in Nuxeo DM.

The extensions are available for download on the authentication page of Nuxeo DM.
You can also find links for older versions of the extensions here.

Supported browser versions are listed below:

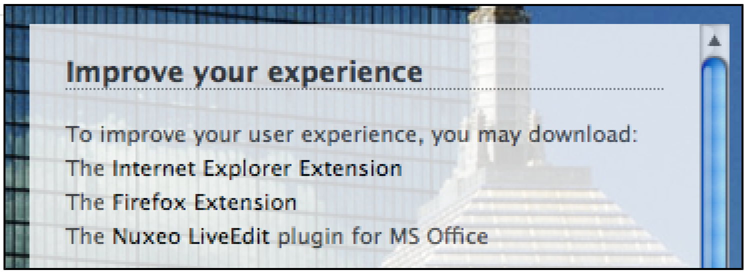
- FireFox 2 and later,
- Internet Explorer 6.0 and later.

Install Drag and Drop extensions

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

Install FireFox extension

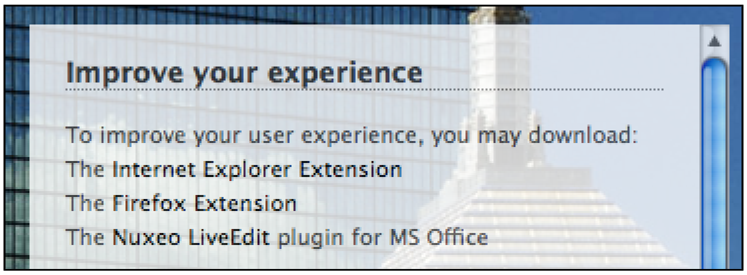
The Nuxeo D&D extention for FireFox is available on the login page of Nuxeo DM.



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 login page and follow the instructions.

Install Internet Explorer extension

To make drag and drop available on Internet Explorer, you need to install the Internet Explorer extension available from the login page of Nuxeo DM.



The extension is available in 2 formats:

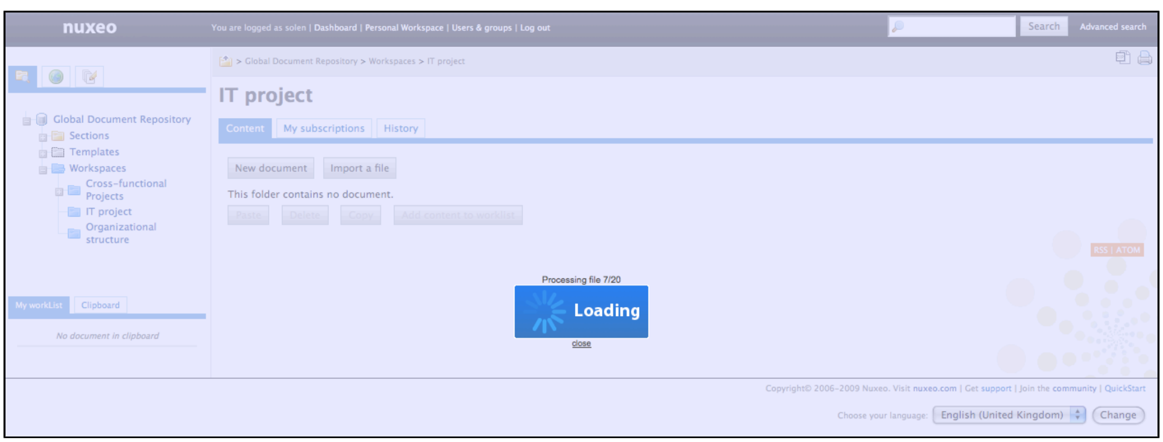
- .exe: includes the drag and drop package and the needed dependencies
- .msi: includes only the drag and drop package

To install the Internet Explorer extension, click on the link on login page and follow the instructions of the installer.

Importing content using Drag and Drop

You can use Drag and Drop to easily import content into Nuxeo DM or just to create one document at a time.

To import content into Nuxeo DM, drag an item (file or folder) 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 or folder.
You can drag and drop files (one or more at a time) or folders with multiple files in Nuxeo DM. The complete struture of the dropped folder is reproduced and created in Nuxeo DM.



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

Item type	Document created in Nuxeo DM
Folder	Folder
Microsoft Office file	File
OpenOffice.file	File

.txt file	Note
Picture (.jpg, .png, etc)	Picture

Desktop & Office Suites Integration

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

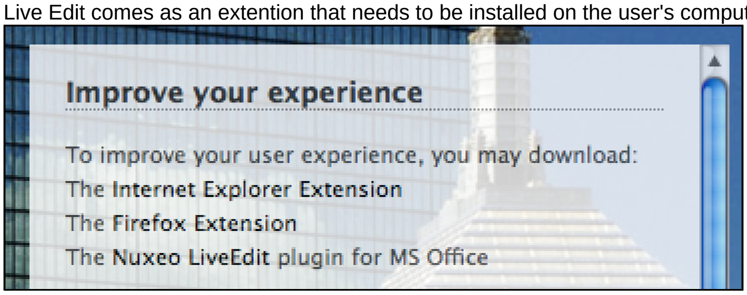
- **Nuxeo Live Edit** enables you to create and edit office documents in their native application from Nuxeo DM. Nuxeo Live Edit is available as an extension to be installed on the user's computer. It is available from Microsoft Office and OpenOffice.org.
- **Nuxeo WSS** enables you to work on Nuxeo's 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 authentication page of Nuxeo DM.

Working with Live Edit

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

Live Edit comes as an extention that needs to be installed on the user's computer. It can be downloaded from Nuxeo DM's authentication page.



Live Edit is available for:

- MS Office
- OpenOffice.org

Live Edit allows you to:

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

Create office documents

To create office documents directly into Nuxeo DM, follow the procedure below.

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 cliking **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.

Edit 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.

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.

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.

	Internet Explorer	**FireFox**
Microsoft Office	Live Edit MS Office-IE (.msi)	Live Edit MS Office-IE (.msi) FireFox Protocol Handler
OpenOffice.org	Live Edit MS Office-IE (.msi) Live Edit OOo-IE (.exe)	Live Edit OpenOffice.org extension (.otx) FireFox Protocol Handler

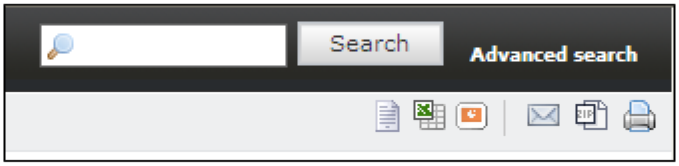
Below are the instructions to install Live Edit:

- for MS Office and Internet Explorer users,
- for MS Office and Firefox users,
- for OpenOffice.org and Internet Explorer users,
- for OpenOffice.org and Firefox users.

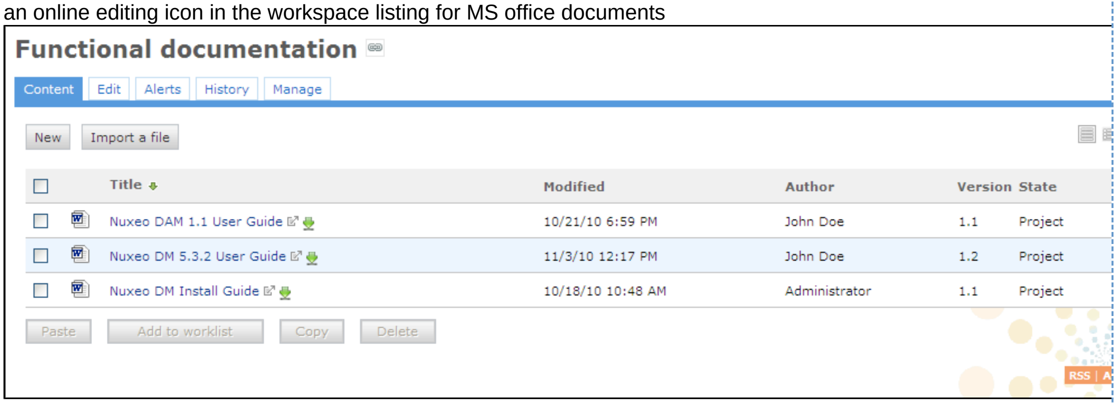
For MS Office and Internet Explorer users

To install Live Edit for MS Office:

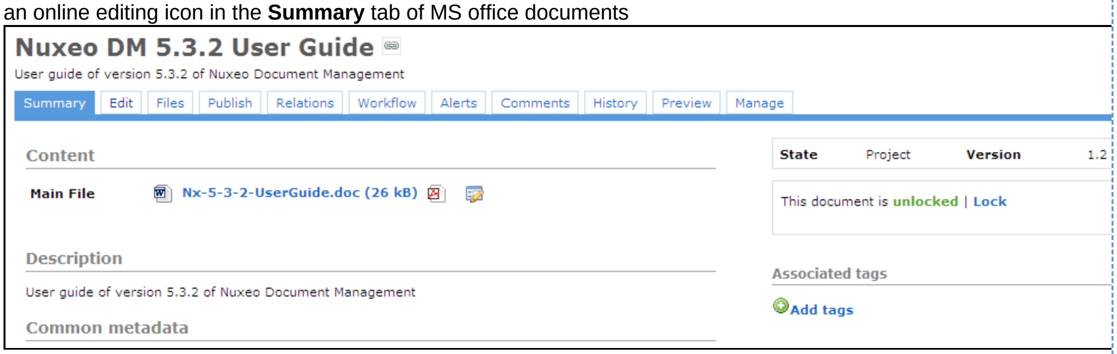
1. Run the Live Edit installer and follow the instructions.
2. If your are using Internet Explorer, close all windows and restart it.
3. Go on your Nuxeo application.
   You now have new icons displayed:
   - MS Office icons below the search box



   - 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 FF 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 protocal handler,
3. Configure the FireFox protocol handler.

Install 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.

Install Firefox Protol 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 Nuxeo DM. To see the icons and be able to edit documents, you need ton configure the protocol handler.

Configure 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 to check correctly "Preserve compatibility".

   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**.

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`

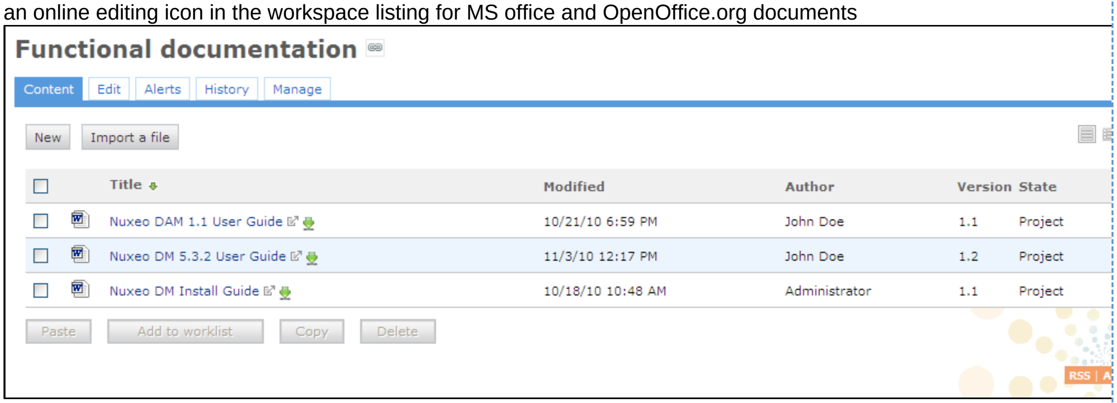
For OpenOffice.org and IE users

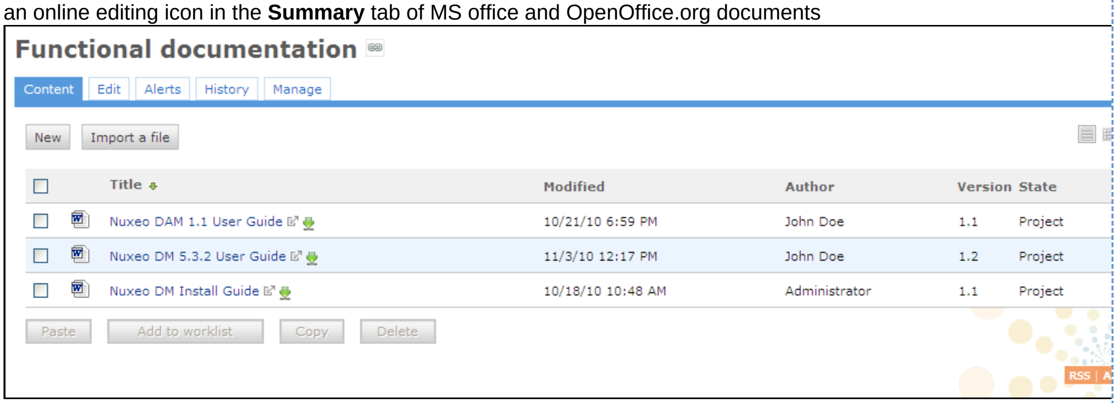
To make Live Edit work when you use OpenOffice.org and Internet Explorer, you need to:

1. install the MS Office - IE Live Edit (see #LiveEdit-MSO-IE-forFF)
2. install the OpenOffice.org - IE Live Edit extension

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
     

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

   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.

Install the Live Edit OpenOffice.org extension

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.

Then you need to install and configure the Firefox extension.

Install Firefox Protol 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 Nuxeo DM. To see the icons and be able to edit documents, you need ton configure the protocol handler.

Configure 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 to check correctly "Preserve compatibility".

   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.

Working with WSS

Nuxeo DM supports the Windows SharePoint Service (WSS) protocol and thus enables you to create and edit MS Office documents stored in Nuxeo DM directly from Windows Desktop, without having to go on your Nuxeo DM application at all.

Nuxeo WSS doesn't require any plugin installation or configuration on Nuxeo side or Windows side.

Using WSS, you will be able to do the following actions on Nuxeo MS Office documents, from Windows directly:

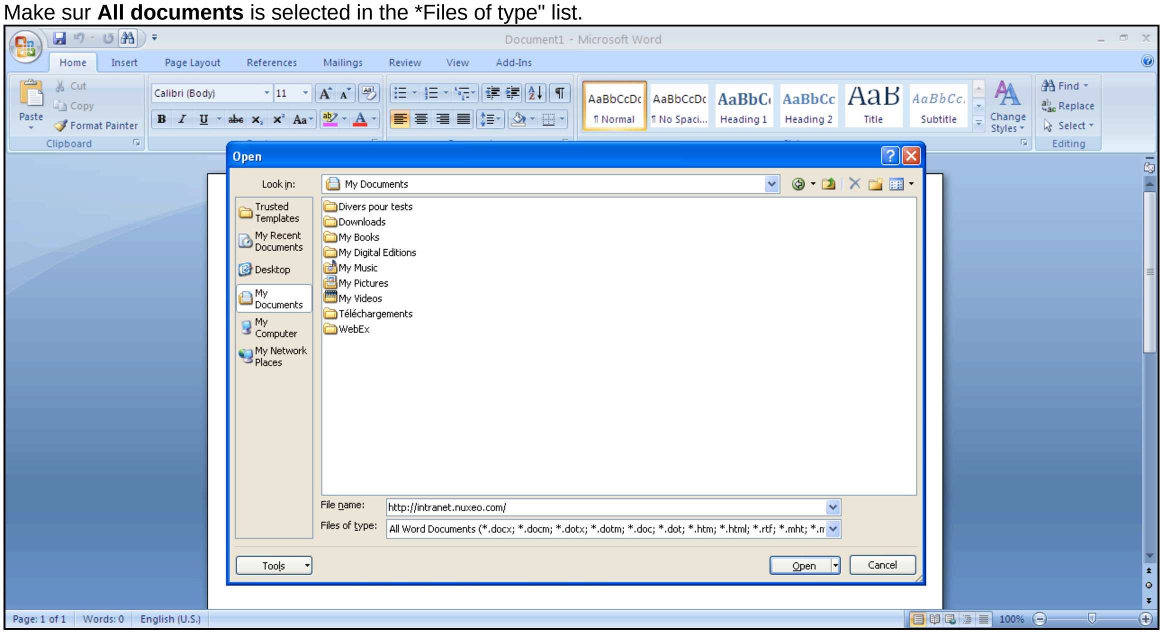
- create documents and folders,
- edit documents,
- move documents and folders,
- access some document management informations from Nuxeo:
  - relations on the document,
  - contributors of the document,
  - workflow tasks on the document,
  - other documents in the same folder.

Edit documents

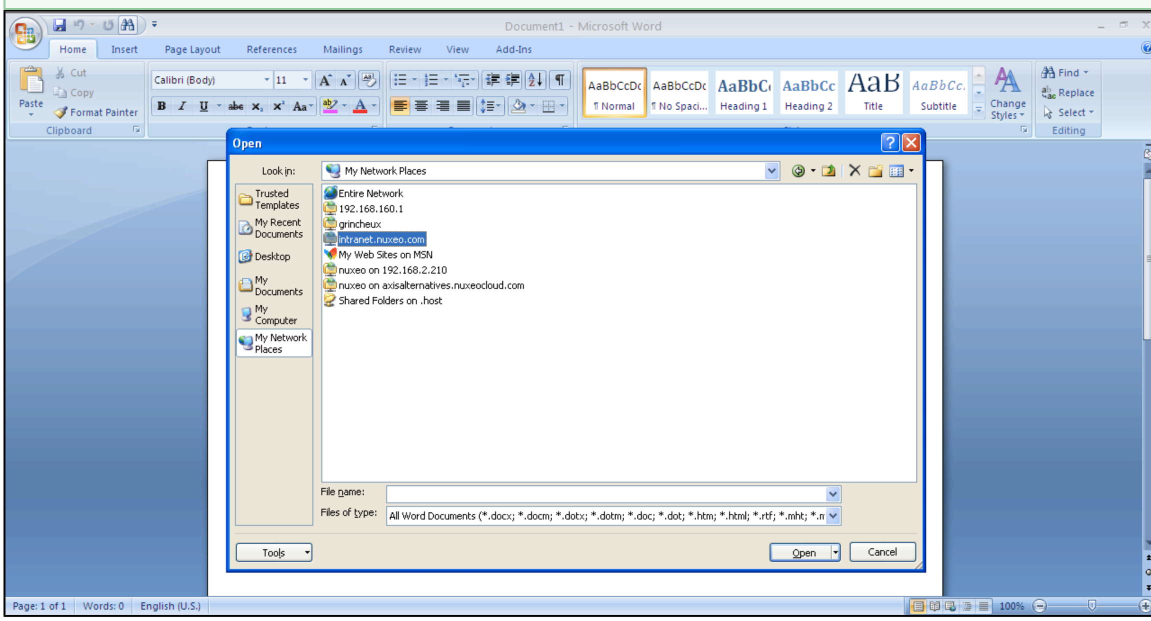
To edit a document from MS Office directly:

1. Open the document's native application.

2. Click **Open**.
3. In **File name**, type the address of your Nuxeo DM application.
4. Make sur **All documents** is selected in the *Files of type" list.

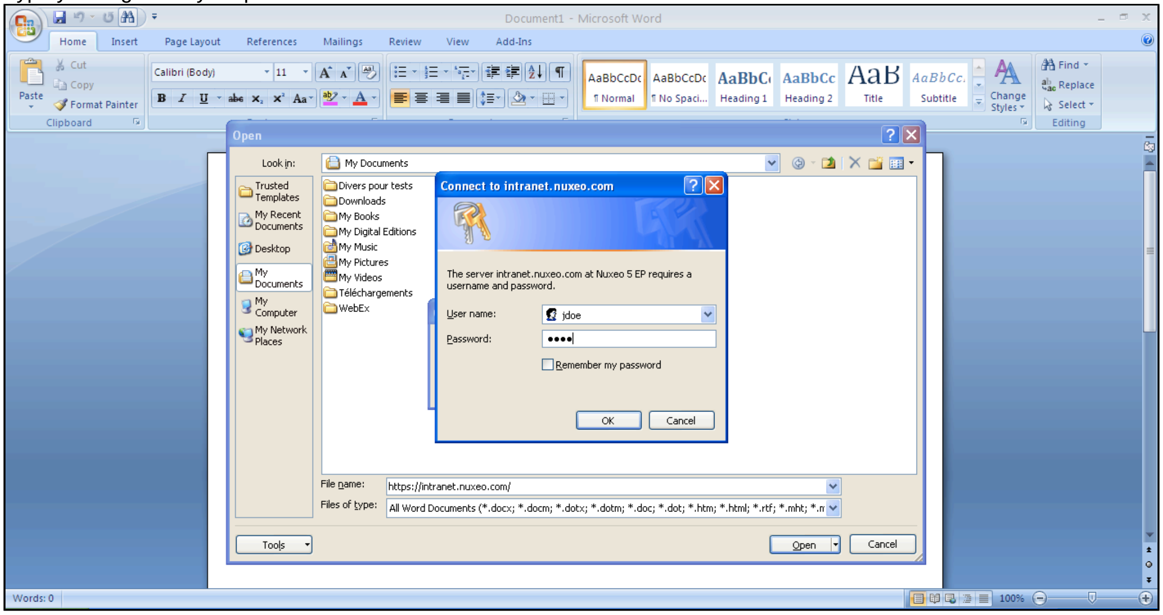


If you already connected to your Nuxeo DM application from Windows directly, you can find it in **My network places** using the explorer.



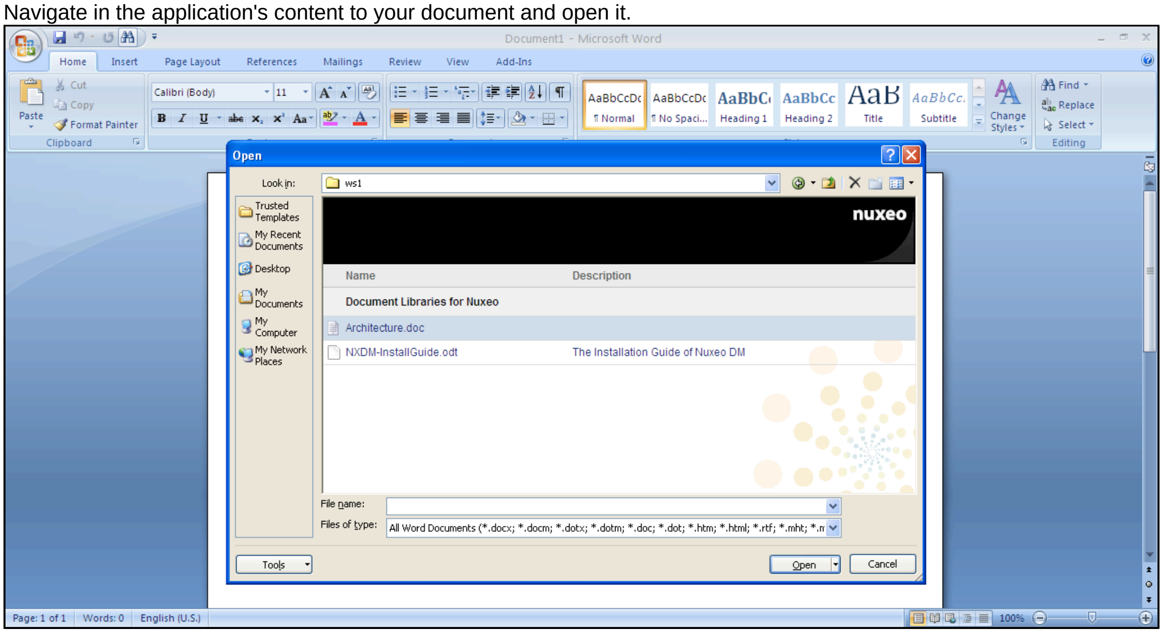
5. Click on the **Open** button.
   A connect window opens.

6. Type your login and your password and click on the **OK** button.

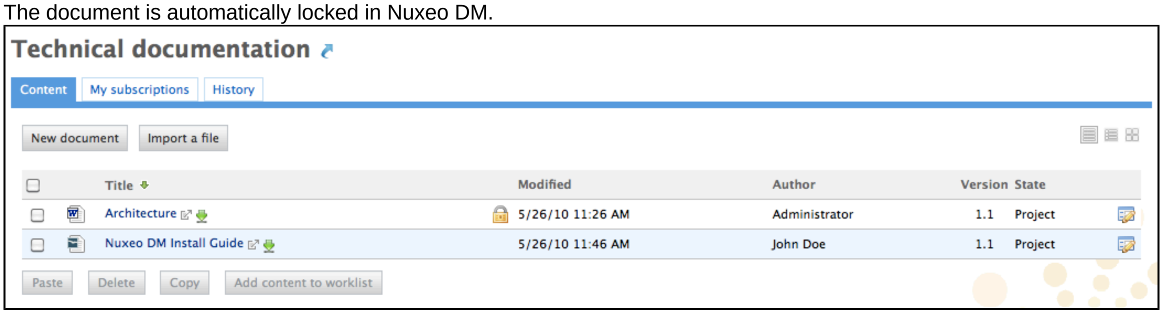


Your applications folders are displayed.

7. Navigate in the application's content to your document and open it.



The document is automatically locked in Nuxeo DM.



8. Edit the document.
9. Save the modifications.
   Modifications are saved in Nuxeo DM directly.
10. When done, close the document.
    The document is unlocked in Nuxeo DM.

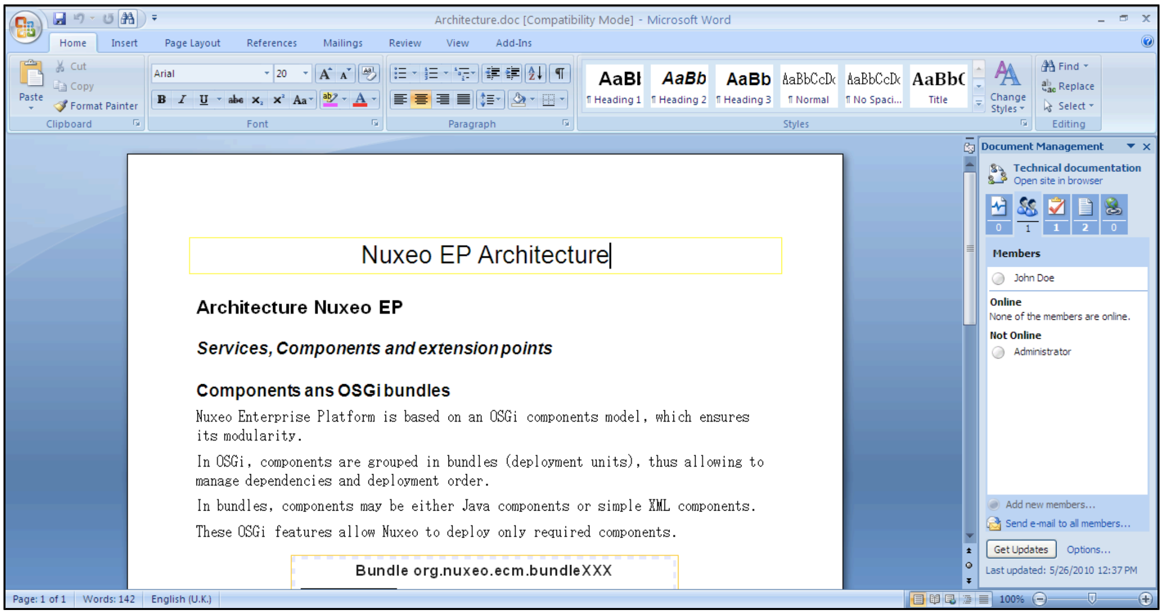
Consult the information on the document

Nuxeo WSS gets some informations from Nuxeo that you can consult directly from MS Office as you edit the document. These information are :

- the contributors of the document,
- the relations on the document,
- the workflow tasks pending on the document.
  You can also see and open the other documents in the same folder.

To see more document management information on the document:

1. In the MS Office application, open the Document Management panel from Windows menu > Server > Document Management Information.
   A new panel opens.
2. Click on each of the tabs to see the different informations on the document.



Create content in Nuxeo from Windows

You can create folders and documents in Nuxeo from your Windows desktop.

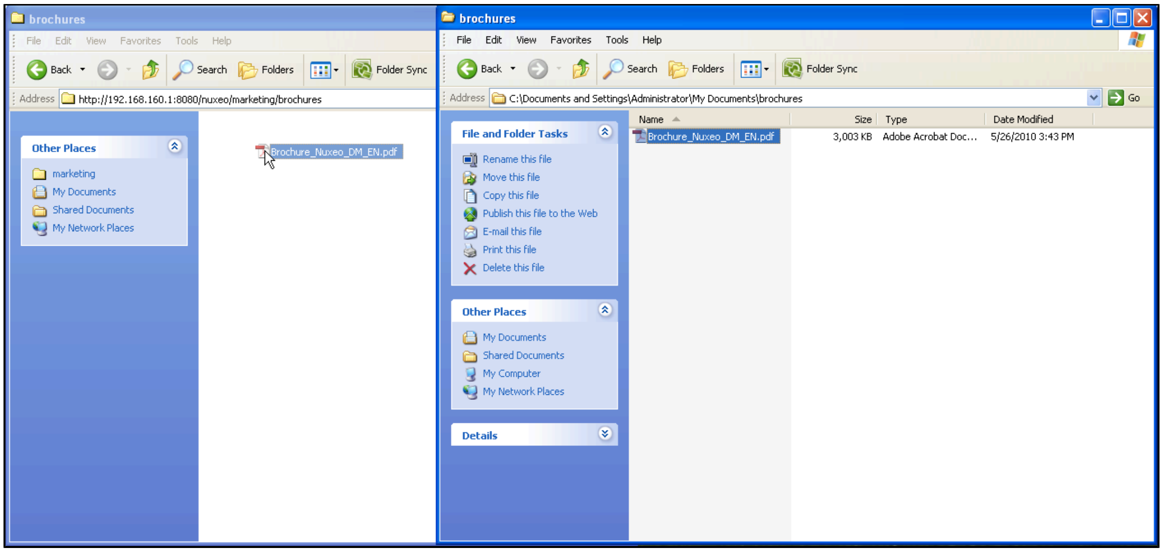
The SharePoint integration in Nuxeo DM enables your nuxeo DM application to be recognized as a **Network place** by Windows.

> If you edited a document using WSS, your application is already available in the network places.
> If you haven't connected to your nuxeo DM application from Windows yet, use Windows **Add a new network place** feature to add your application in the network places.

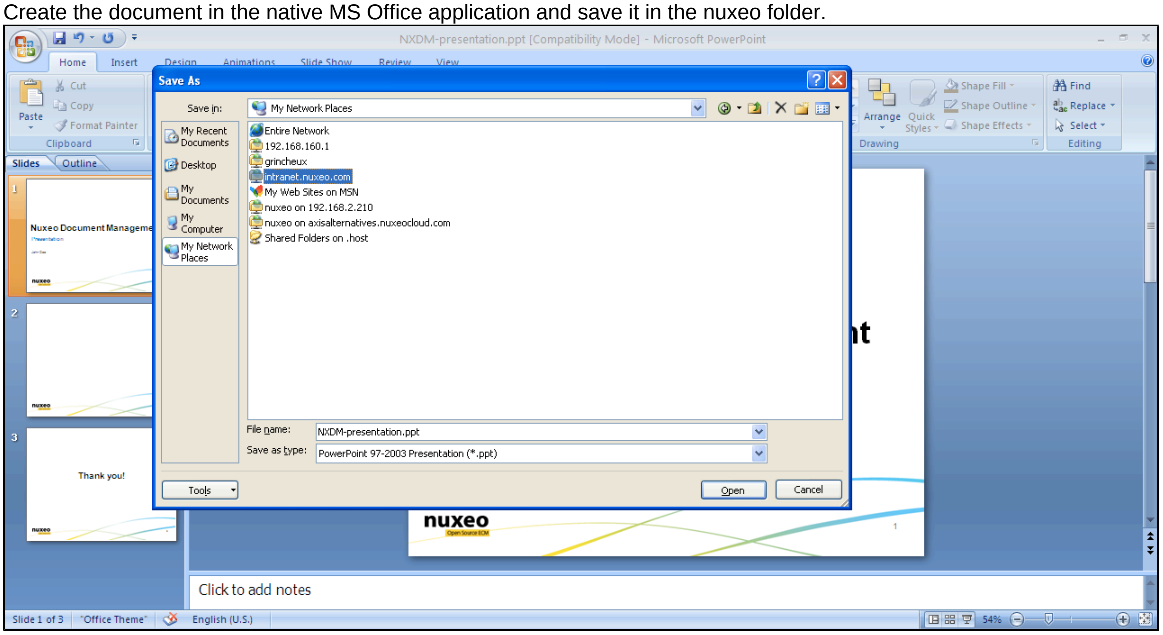
You can then create, copy and move documents and folders in Nuxeo DM via the Windows Explorer the same way you would do in a local folder like *My Documents*.

To create documents in a Nuxeo folder or workspace, you can:

- drag and drop files from a local Windows folder into the target Nuxeo folder in Windows Explorer



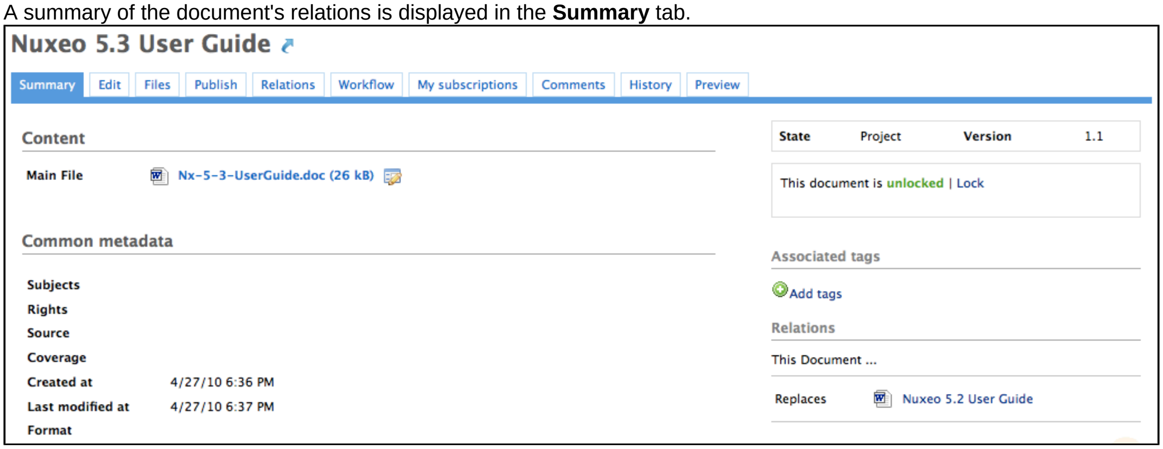
- Create the document in the native MS Office application and save it in the nuxeo folder.



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.



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).

Add 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:

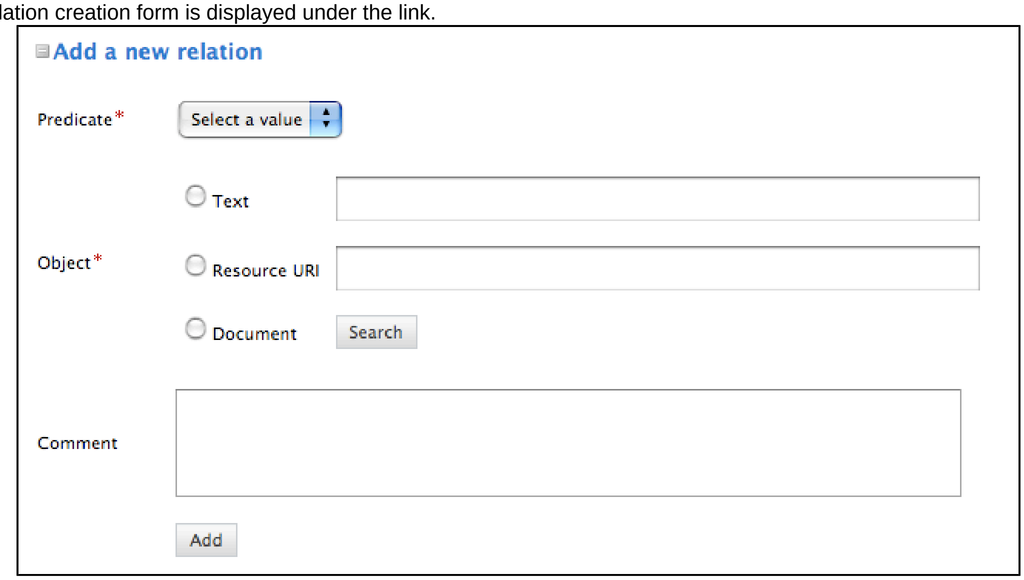
- another document on the application,
- an external document (using URI),
- a text.

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

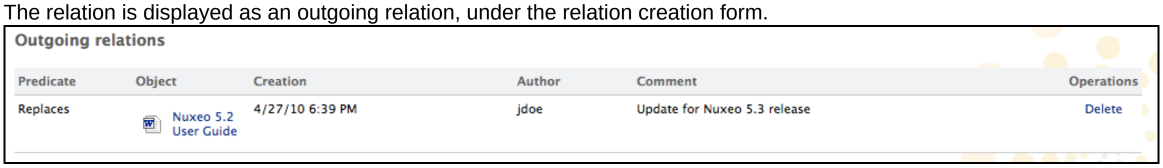
When you add a relation on a document, it creates what we call an "outgoing" relation. The document to which you added the relation automatically has an "incoming" relation.

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.



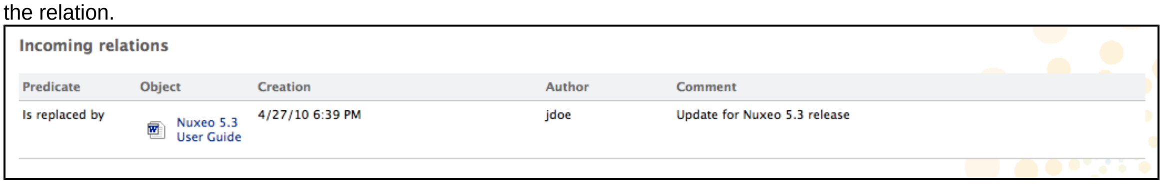
3. Fill in the relation creation form.
4. Click on the **Add** button.
   The relation is displayed as an outgoing relation, under the relation creation form.



Outgoing relations

Predicate	Object	Creation	Author	Comment	Operations
Replaces	Nuxeo 5.2 User Guide	4/27/10 6:39 PM	jdoe	Update for Nuxeo 5.3 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 5.3 User Guide	4/27/10 6:39 PM	jdoe	Update for Nuxeo 5.3 release

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

Delete 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.

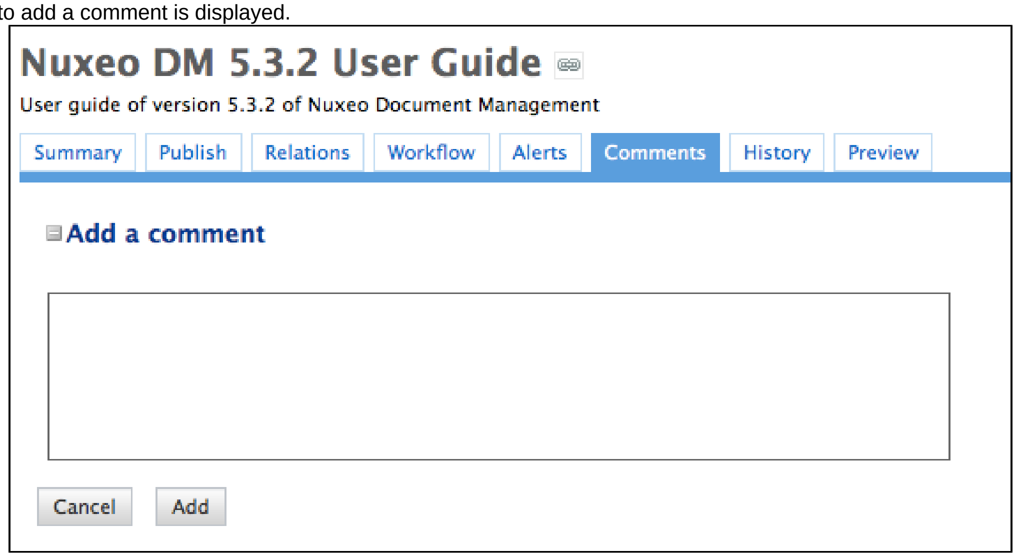
All users can see the comments added on a document.

Add a comment on a document

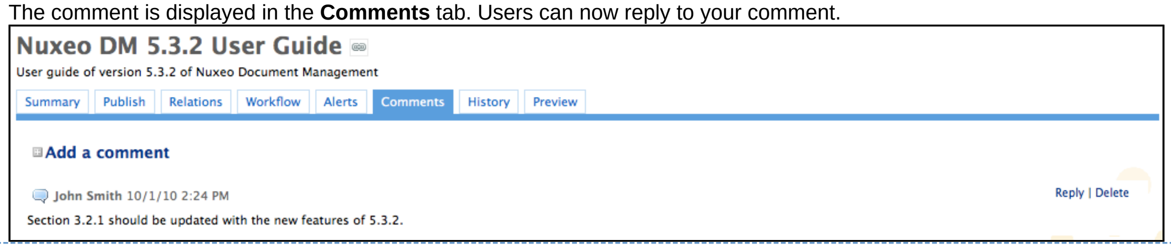
You need reading rights to add comments on documents.

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.



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.



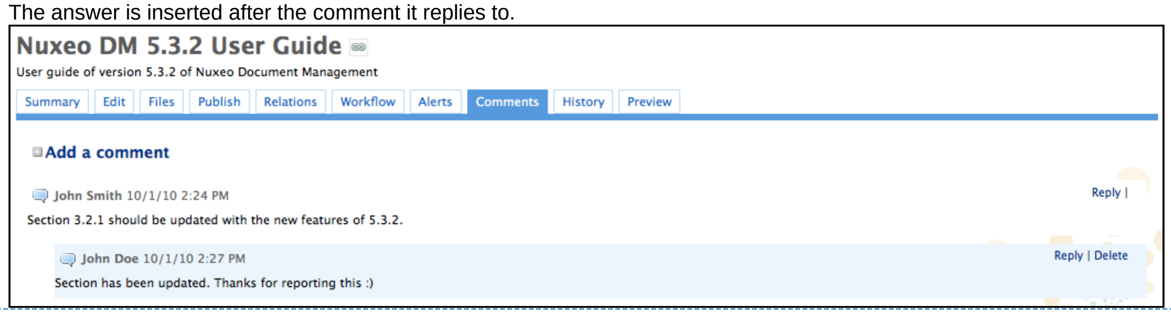
Reply to a comment

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.
   

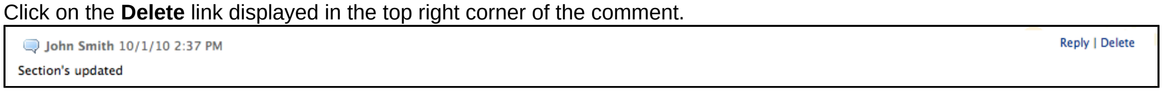
2. Type your comment in the text area.
3. Click on the **Add** button.
   The answer is inserted after the comment it replies to.
   

Delete 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.
   

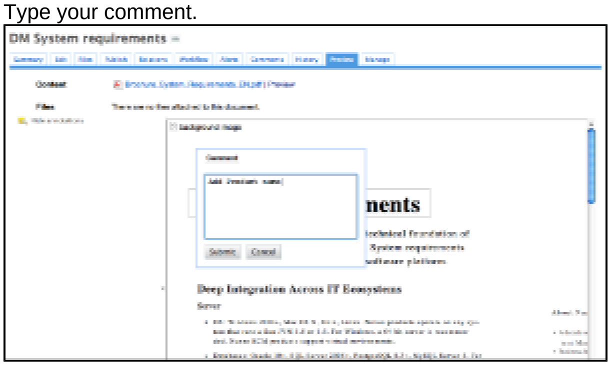
   The comment is immediately erased.

Annotations

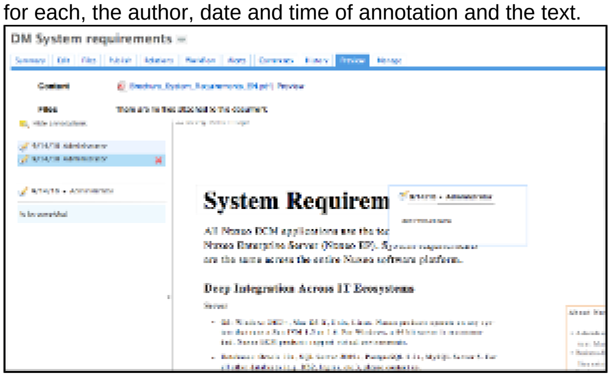
Annotations are post-its or comments placed on the preview of documents.
You can annotate documents as soon as you can access them, ie when you have at least "Read" right.

To annotate a document:

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



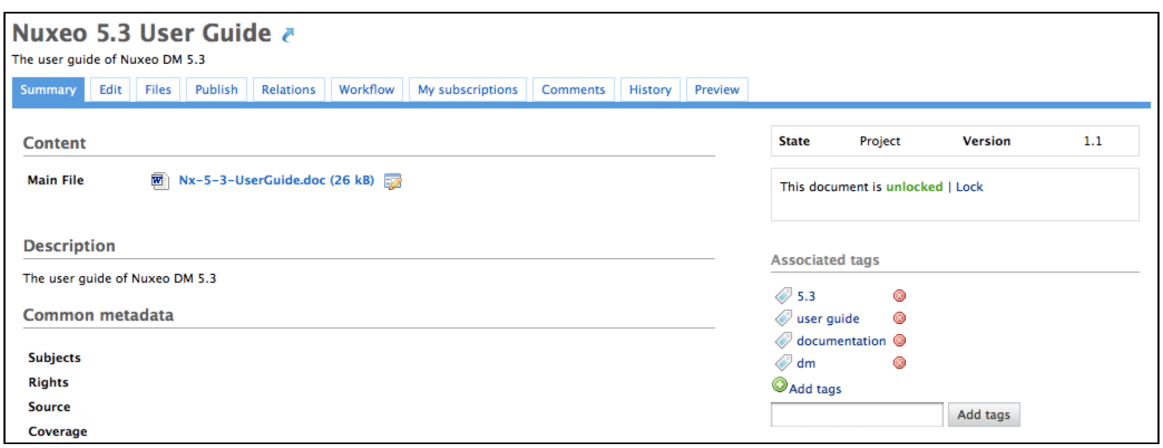
4. Click on "Submit".
   The annotation is saved.
   You can see your annotation when the mouse is over the zone you selected, and, in the margin, the list of annotations, and for each, the author, date and time of annotation and the text.



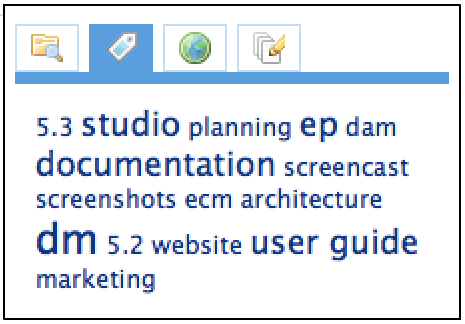
Tags

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.



Tag documents

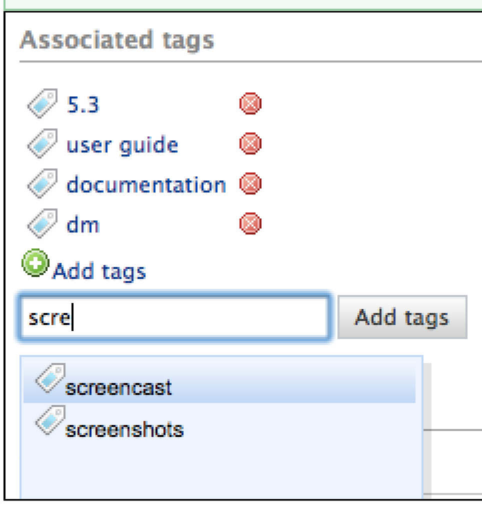
Users can add a tag on a document as soon as they can access the document, ie as soon as they have reading rights.

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.

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

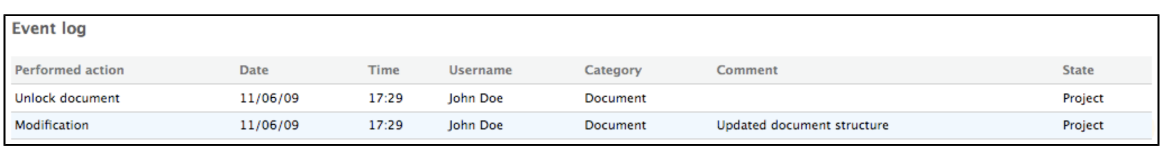
Remove tags

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

Performed action	Date	Time	Username	Category	Comment	State
Unlock document	11/06/09	17:29	John Doe	Document		Project
Modification	11/06/09	17:29	John Doe	Document	Updated document structure	Project

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

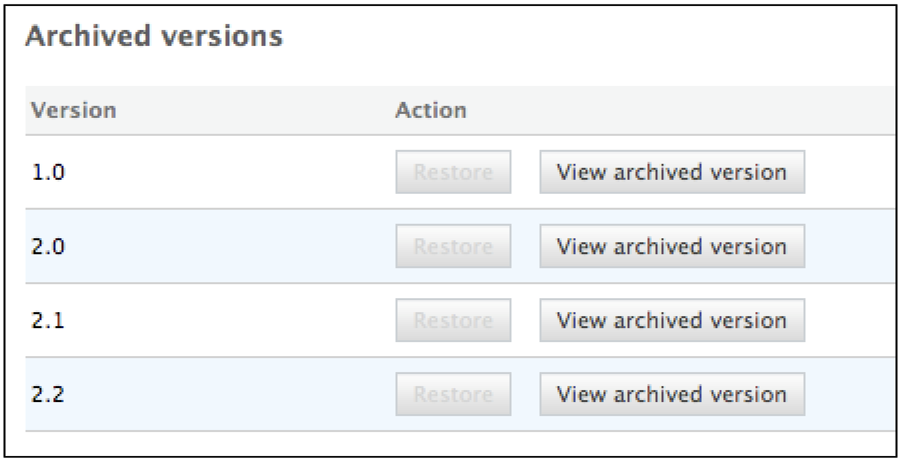
The **History** tab also displays the previous versions of the document that were archived when the document was edited and its version increased. All previous versions can be consulted. You can also restore or delete versions.

Viewing a previous version of a document

All users can consult the previous versions of a document.

Every time you modify a document, the previous version is automatically archived by the system. Thus, the modifications do not erase the original version of the document.

The archived versions are listed below the Event log in the **History** tab.



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

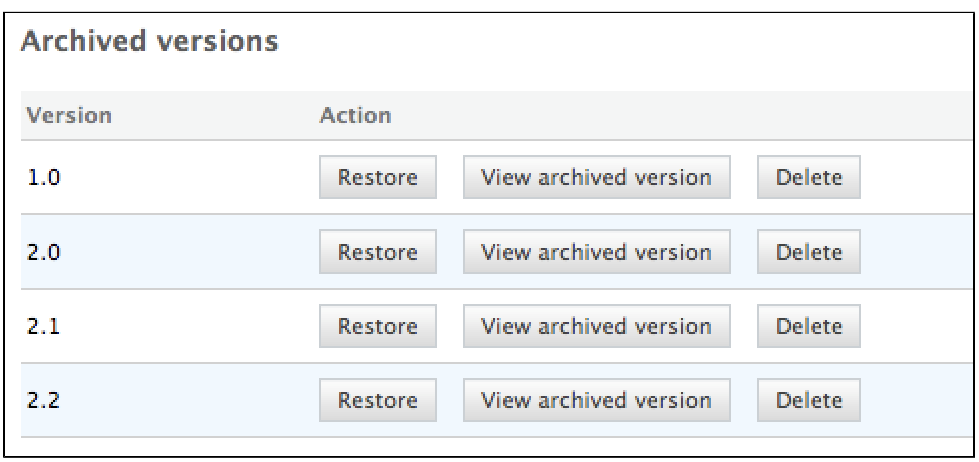
Archived versions have few actions available: you can only create relations from it to another document, annotate it and subscribe to notifications.

Restoring a older version of a document

You need to have writing or management 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.



Deleting a older version of a document

You need to have writing or management 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.

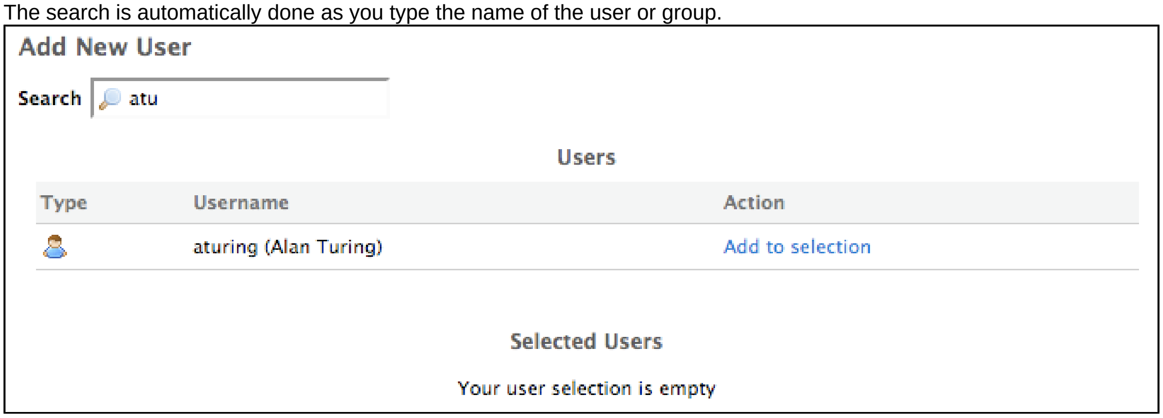
To be informed of content modifications, you can subscribe to email notifications or feeds.
To keep other users notified of the space activity, you can set alerts for users or groups of users so they are automatically informed or send them occasional emails.

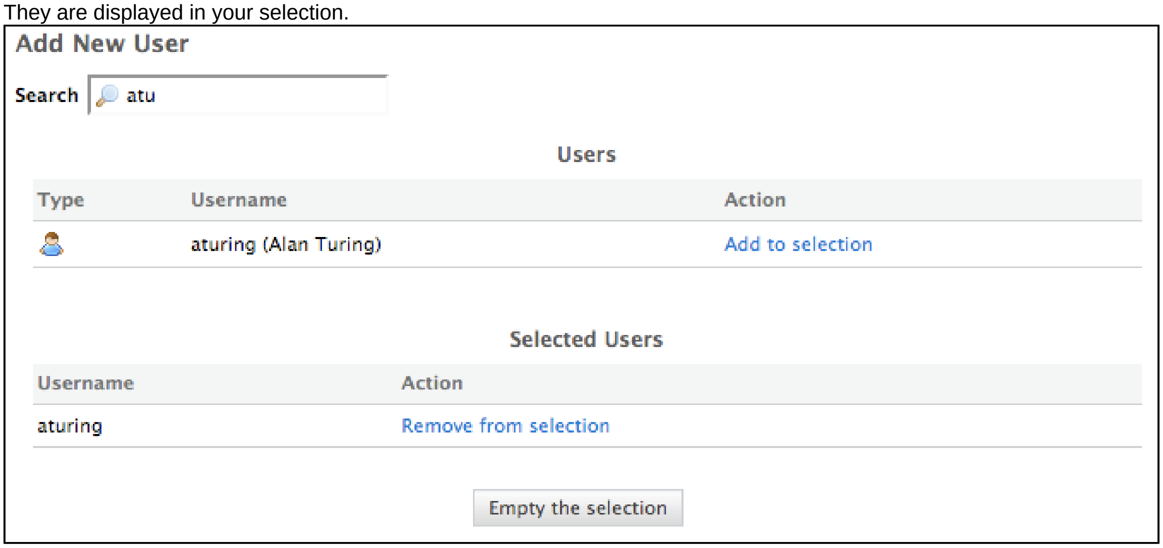
Sending an email

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

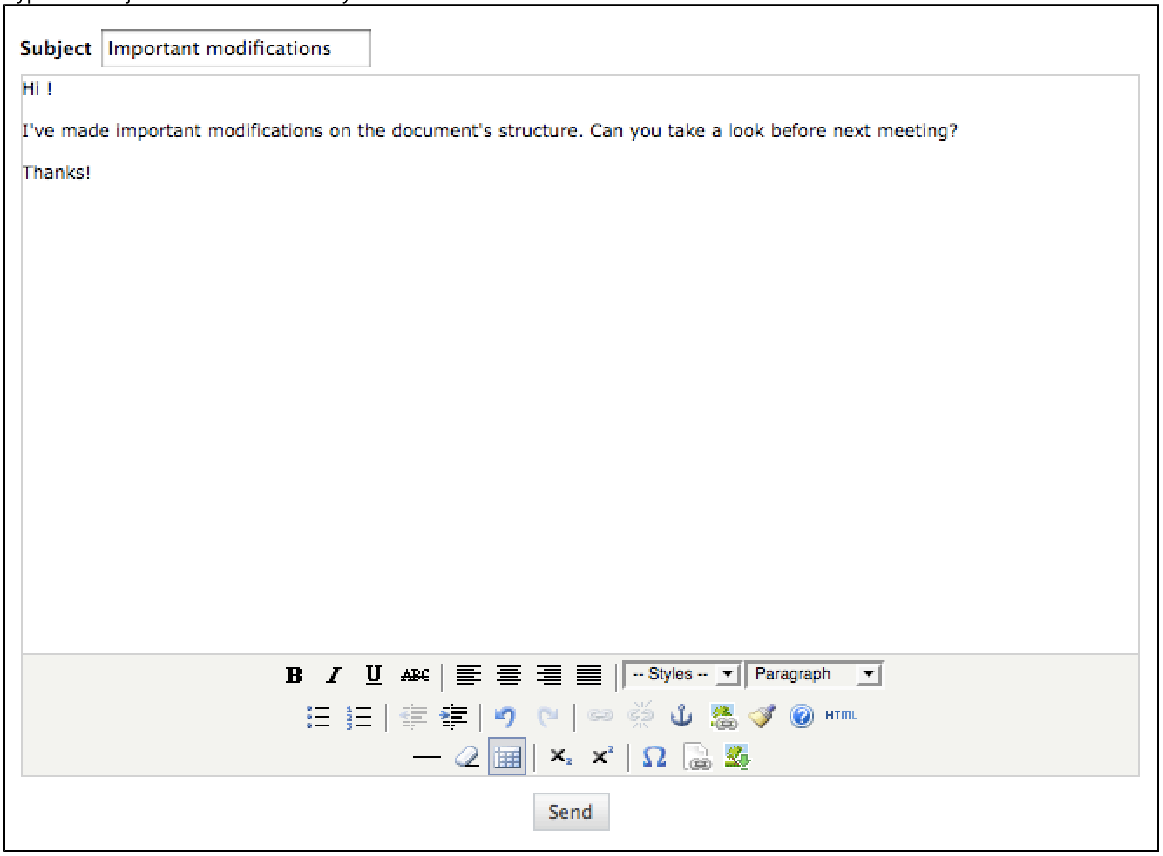
You need to have at least reading rights to send emails.

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.
   

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.
   

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



5. Click on the **Send** button.
   The email is send to the selected users or groups. The **Summary** tab of the document is displayed.

Setting automatic notifications

Notifications are emails automatically sent to users when an event occurs in a space. Notifications are available in every space of the application and on documents. Users can subscribe to notifications and spaces' managers can subscribe users to notifications.

There are six notifications:

- creation: the user gets an email when some content is created in the space;
- modification: the user receives an email every time the space or its content is edited;
- workflow changed: the user receives an email for each action that happens during a review (start, abandon, document approval, document rejection);
- Approval workflow started: the user receives an email every time an approval workflow is started;
- Comments moderation: the user receives an email when a comment is approved on a site.
- publish: the user receives an email when a document is published in the specified section.

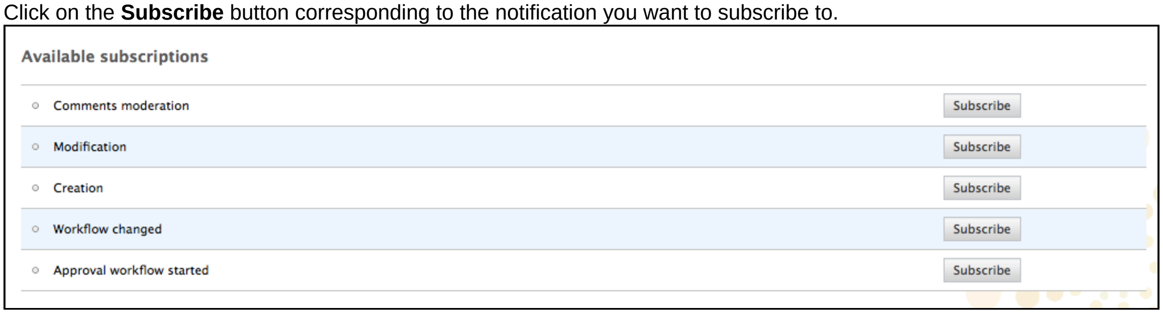
> Publish notification is available in sections only. The other notifications are available in workspaces only.

Subscribing to notifications

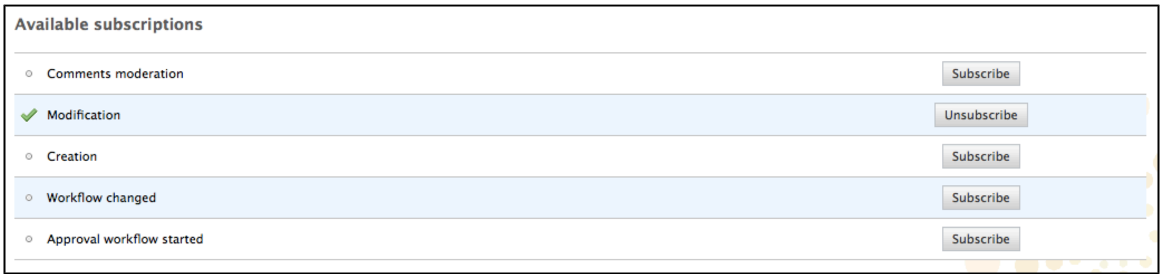
You need to have at least reading rights to subscribe to notifications.

To subscribe to notifications:

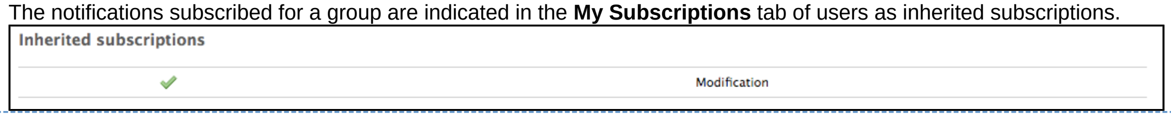
1. In the space, click on the **My Subscriptions** tab.
2. Click on the **Subscribe** button corresponding to the notification you want to subscribe to.



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.



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.



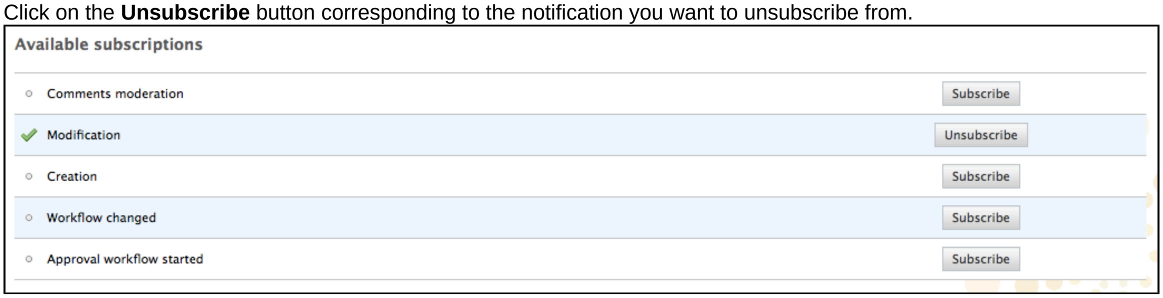
Unsubscribing from notifications

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

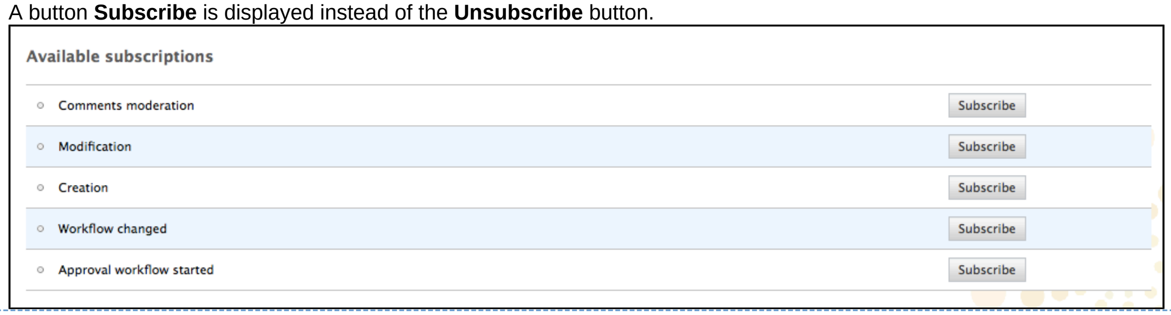
> ⓘ You cannot unsubscribe from notifications subscribed for your group.

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.



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



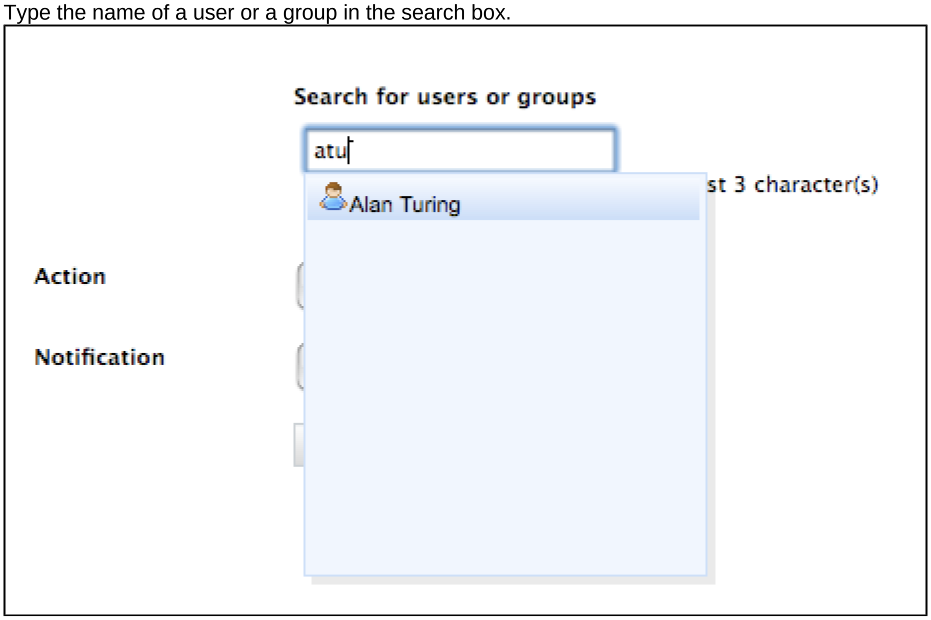
Managing subscriptions

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

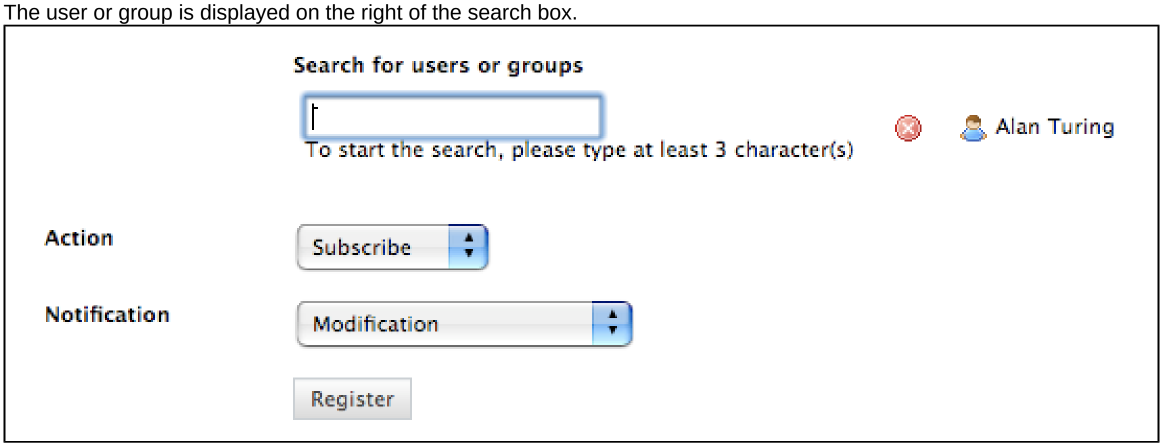
Users with management rights can see the subscriptions users have signed up to. They can also subscribe users or groups to subscriptions or unsubscribe them.

To manage subscriptions:

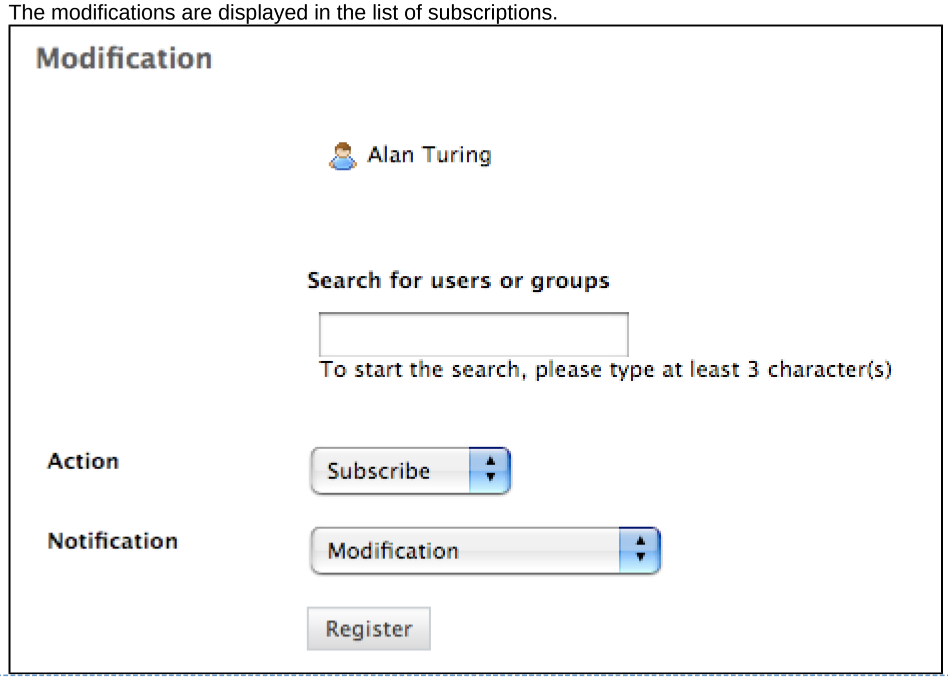
1. In the space, click on the **Manage** tab.
2. Click on the **Subscriptions** sub-tab.
   The lists of users subscribed to each notification type is displayed above a subscription form.
3. Type the name of a user or a group in the search box.



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.

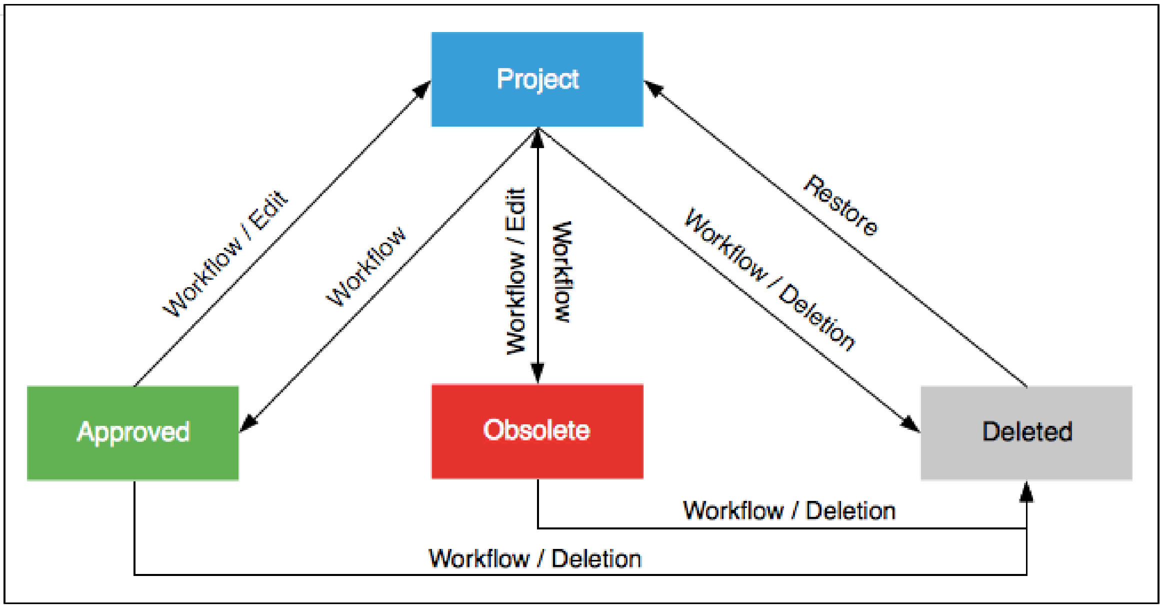


5. Select the action you want to do (**Subscribe** or **Unsubscribe**) and the notification concerned.
6. Click on the **Register** button.
   The modifications are displayed in the list of subscriptions.



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 worflow, 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.

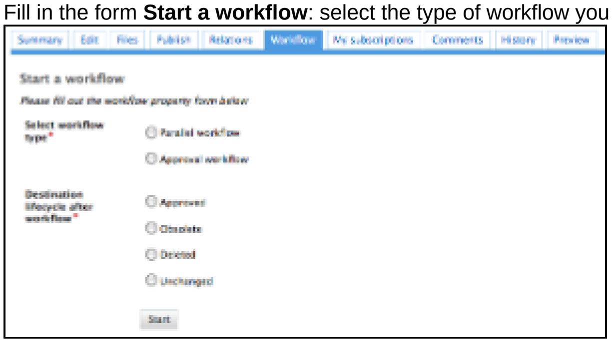
Users who are involved in workflows are alerted by email and can have a synthetic view of all the tasks they have to do on documents in their das hboard. The documents they have to review are listed there.

Start a workflow

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

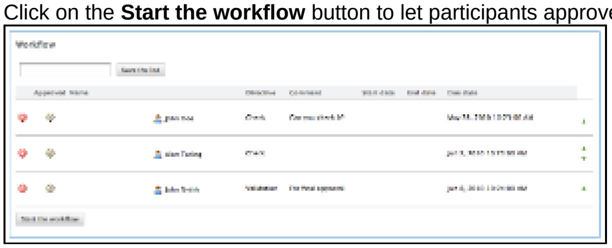
> The process to start a workflow is the same for both workflows.

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.


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.


Manage workflow participants

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

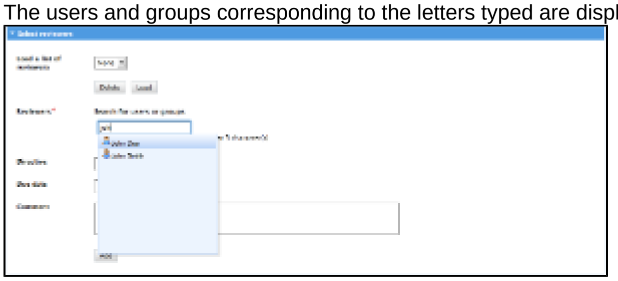
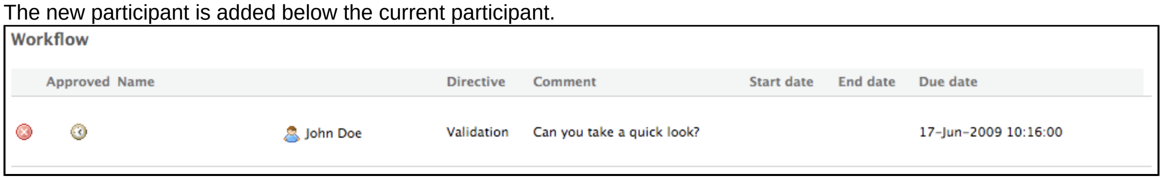
Given the workflow type and your participation to the workflow, you can add new participants, change their order of participation, or remove them. To make recurrent participants management easier, you can also use reviewers lists.

Add 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.
4. Click on the **Add** button.
   The new participant is added below the current participant.
   

You can also load a reviewers list.

Manage reviewers lists

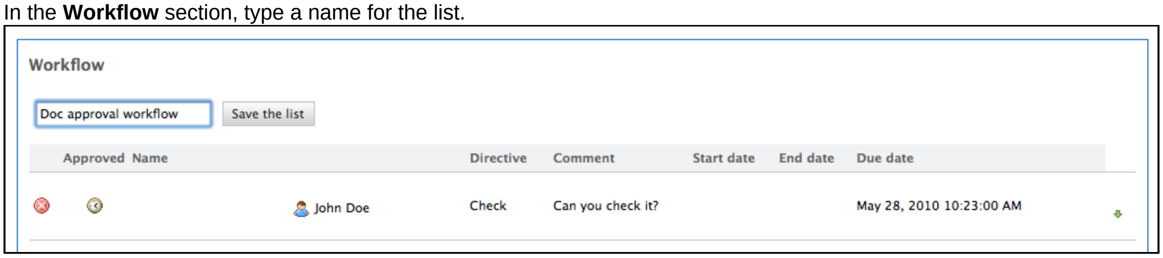
You can save the lists of workflow participants, to reuse them later on the same type of workflow. Indeed, documents often go through the same chains for review or approval.

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.

Save a list

Any user can save a workflow participants list.

To save a list of participants:

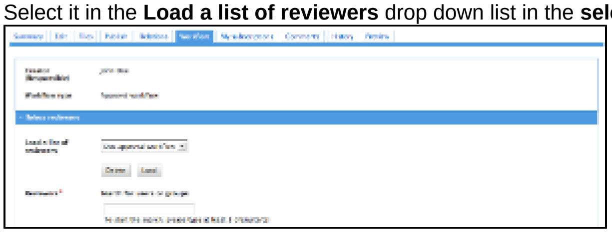
1. Go on the **Workflow** tab of the document.
2. In the **Workflow** section, type a name for the list.
   

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

Load 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).

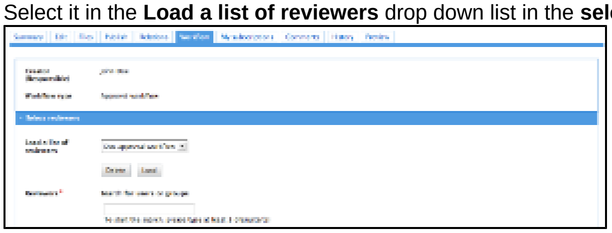
To load a list:

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

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

Delete a list

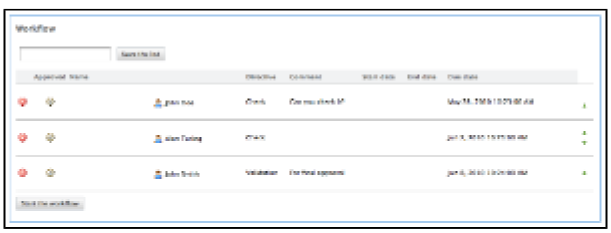
You can delete the lists of reviewers you have saved from a workflow.

To delete a participants list:

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

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

Move 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.



Remove participants

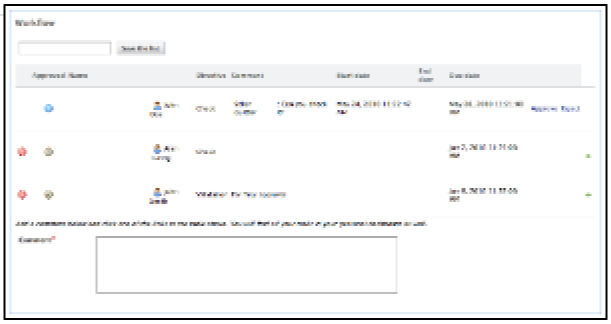
Users who can add participants to a workflow can also remove them from the workflow.

To remove a user from the workflow's participants:

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

Participate 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.



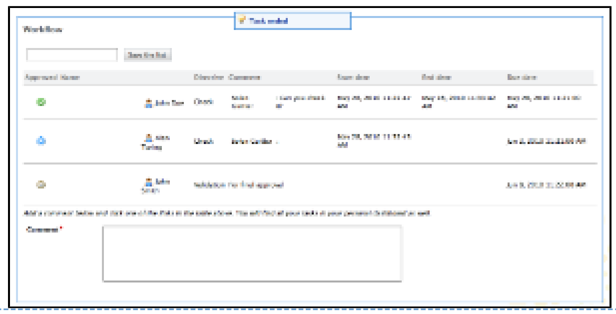
The workflow initiator can approve or reject the document in behalf of all the workflow's participants.

Approve 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.

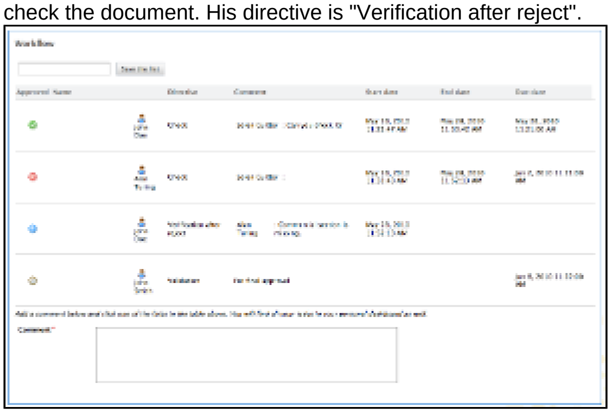


Reject a document

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".



End 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.

Abandon a workflow

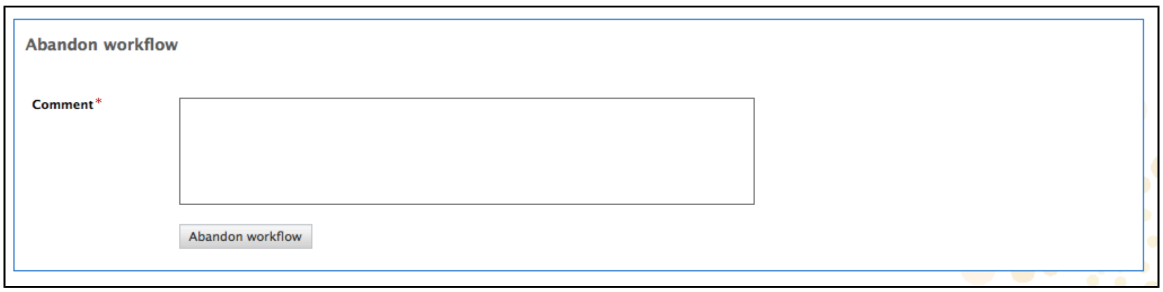
Only the workflow initiator and administrators can abandon a workflow.

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.



Comment is mandatory to abandon a workflow.

1. 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.

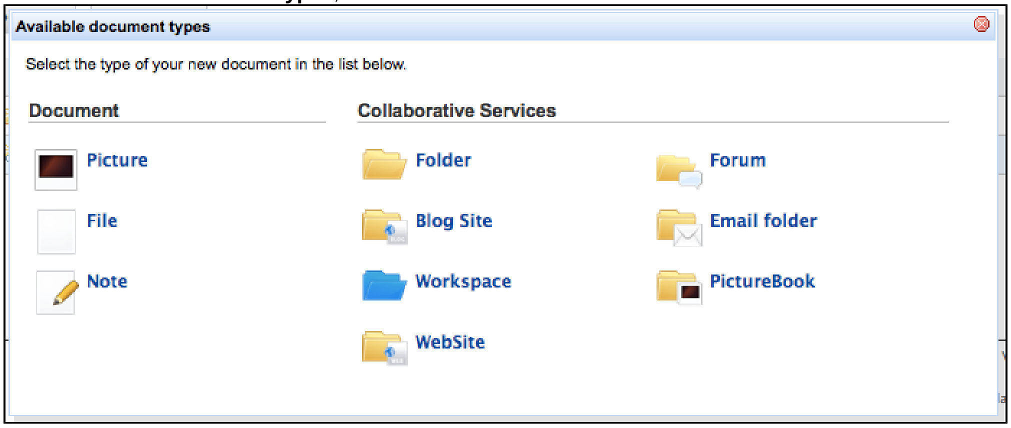
Create a forum

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

You can create forums only in workspaces.

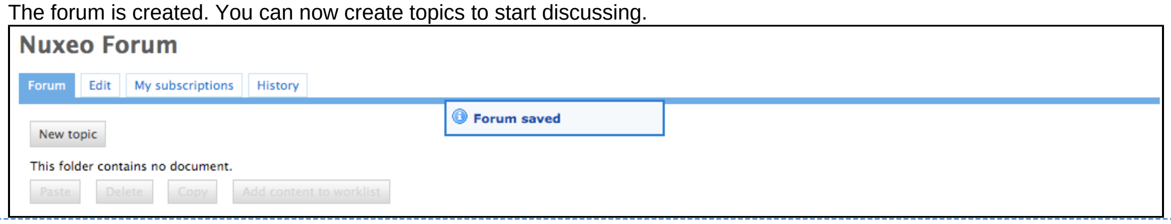
To create a forum:

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



Edit 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.

Manage 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.

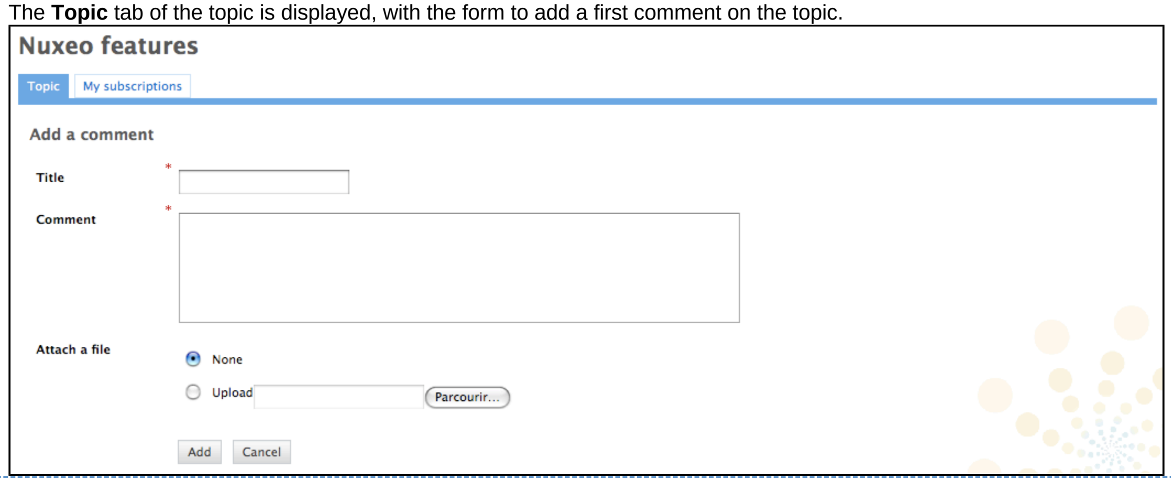
- In an topic without moderation, the content is available without preliminary approval.
- In a moderated topic, the content needs to be approved by a moderator to be visible for users.

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

Add 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.



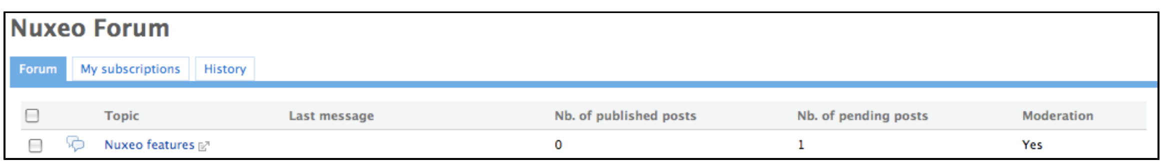
The list of the topics available in a forum is displayed in a table in the **Forum** tab.

Moderate 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.

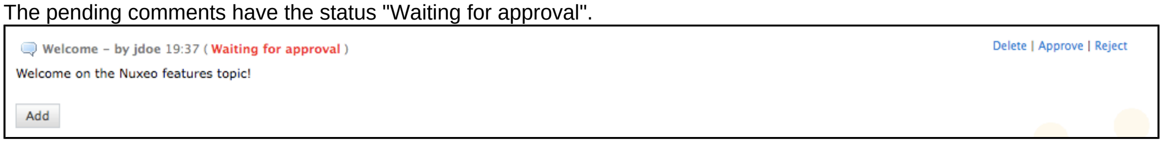
Moderators can see if there are comments pending in the forum tab. The number of comments waiting for approval is indicated for each topic of the forum.

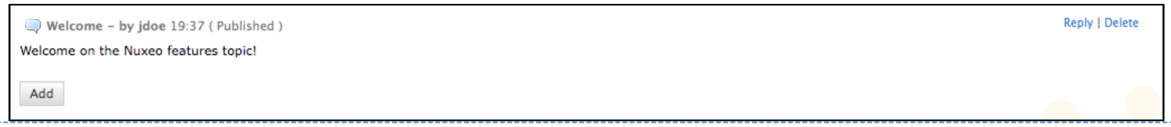


Approve a comment

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

To approve a comment:

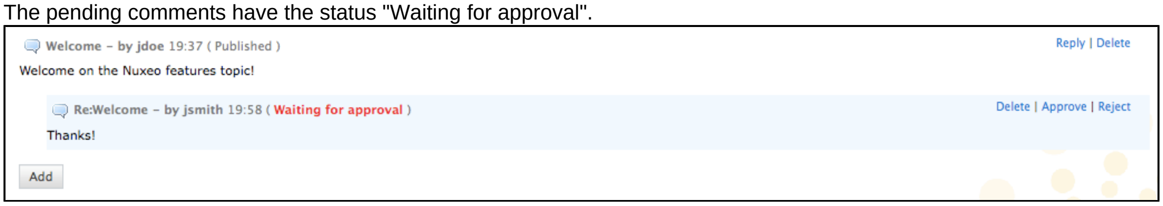
1. Open the topic that has pending comments.
   The pending comments have the status "Waiting for approval".
   

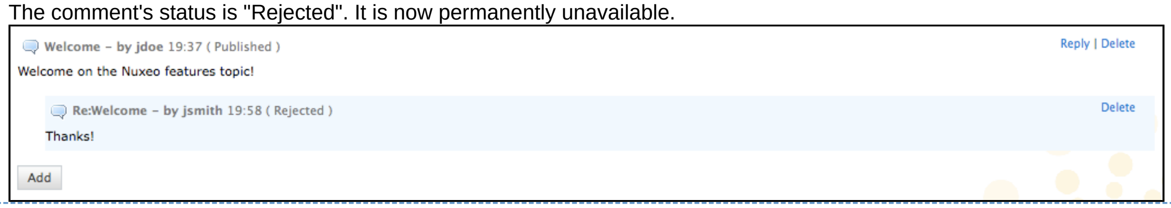
2. Click on the **Approve** link in the top right corner of the pending comment.
   The comment's status is "Published". It is now available to all forum readers.
   

Reject 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".
   

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.
   

Delete 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.

Delete 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.

Participate to a topic

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

Add a comment to a topic

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

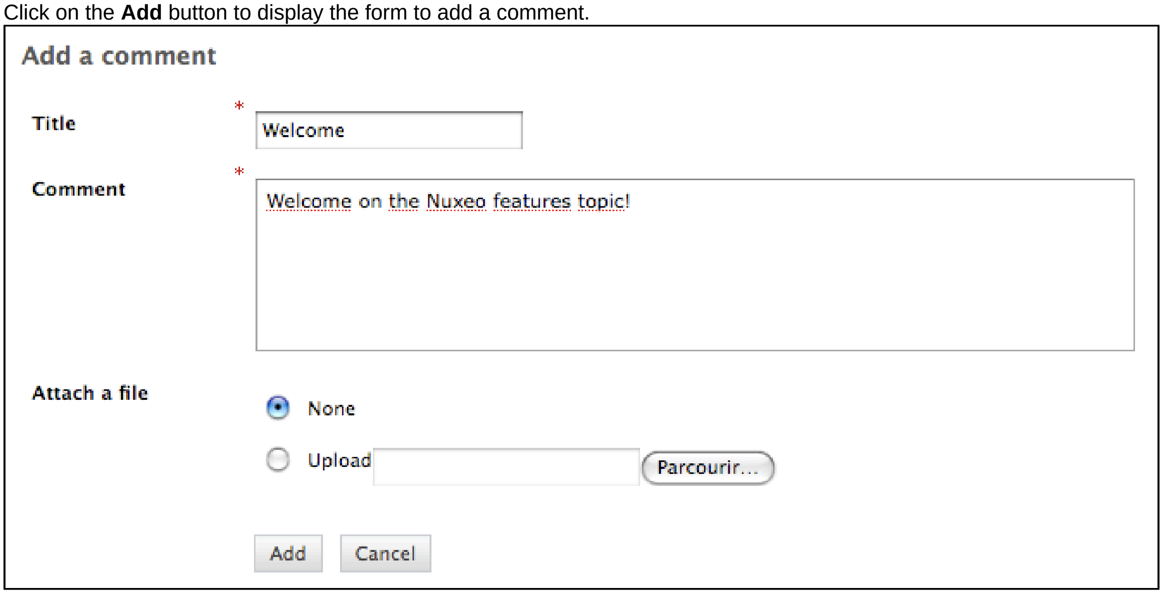
You can attach a file to your comment, that users will be able to consult. The attached file of a comment cannot be modified or removed afterwards.

To add a comment to a topic:

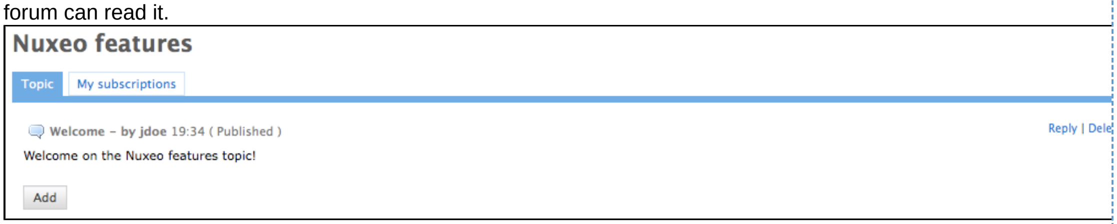
1. Click on the **Topic** tab of the topic.

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

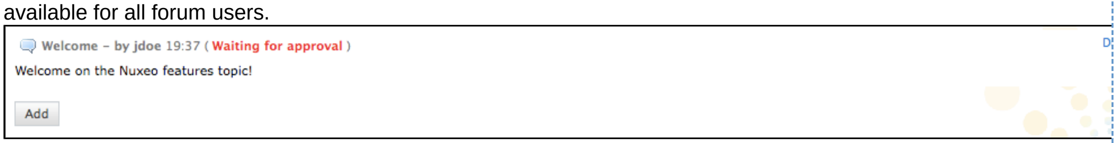
2. Click on the **Add** button to display the form to add a comment.



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.



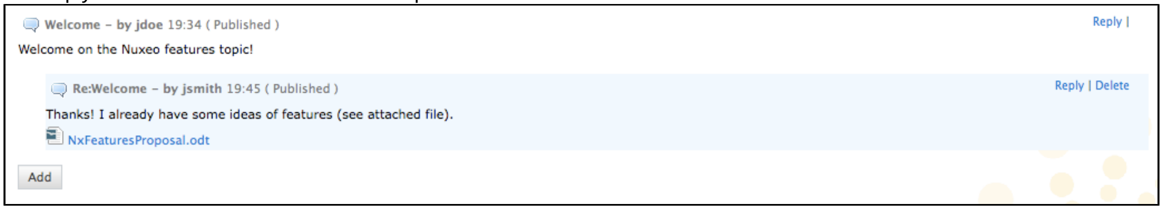
   If you are the moderator of the topic, your comment is automatically published.

Reply 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.

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

In this section, we will see how to:

Manage picture books

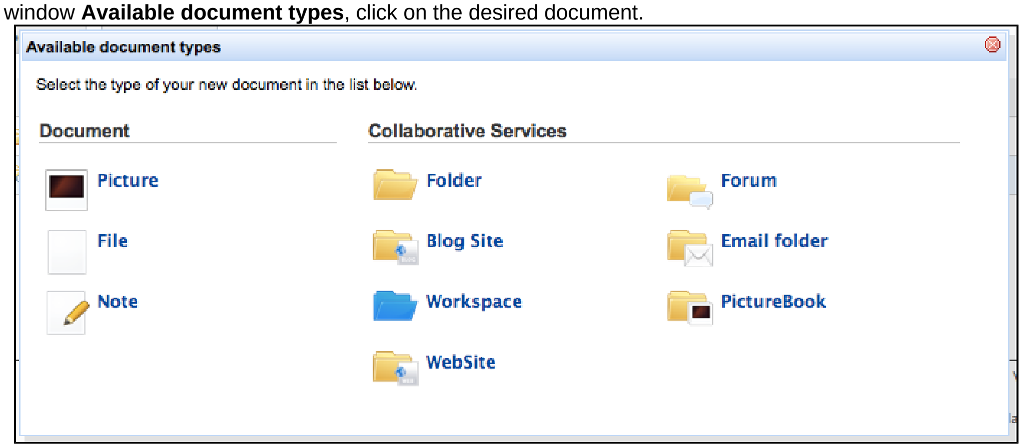
Picture books are folders adapted to hold only pictures. As so, you have some specific parameters that you need to fill in when you create a picture book.
A picture book can only hold pictures and other picture books.

Create a picture book

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

To create a picture book:

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.

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	Different views and formats available for the pictures available in the picture book. Default views available are: • 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.

Edit 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.

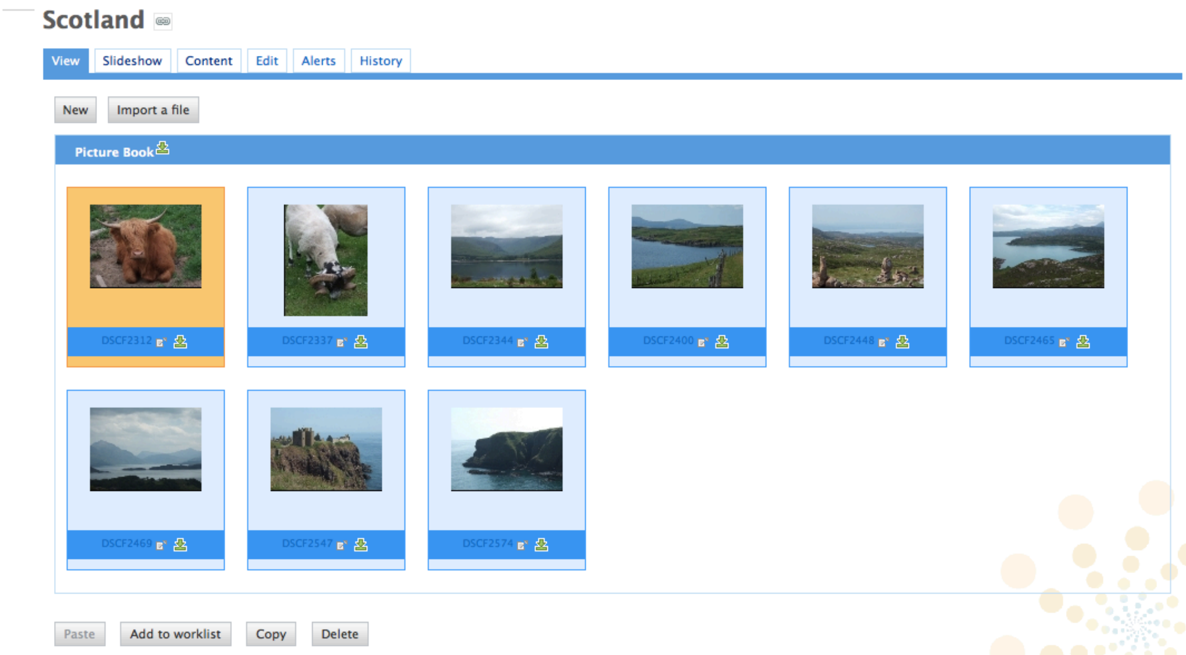
To edit a picture book:

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.

View 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.



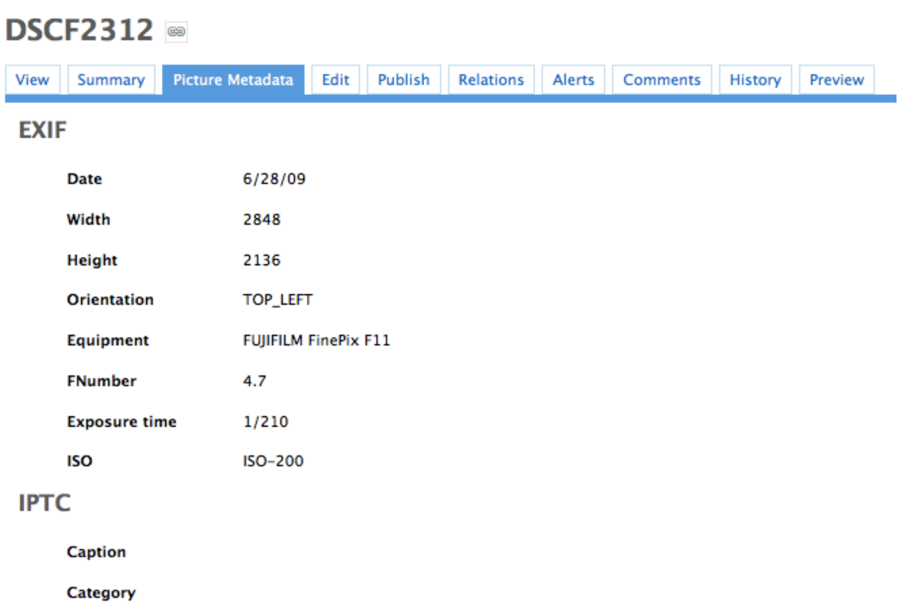
A **Slideshow** tab is also available on picture books, in which the pictures are displayed in a slideshow.

Manage pictures

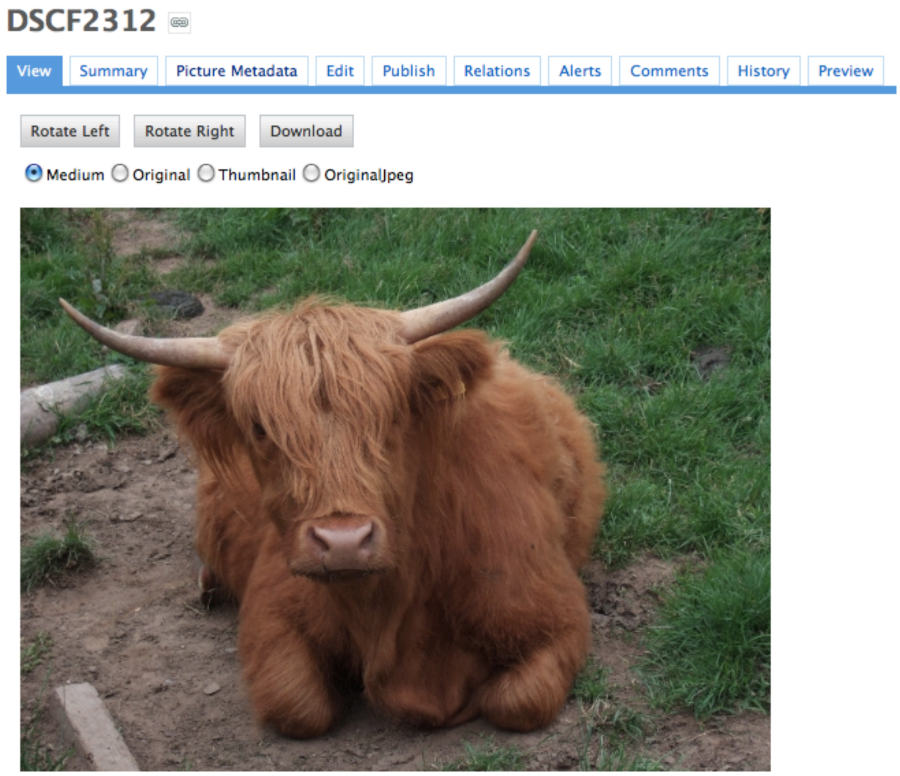
Pictures can be created in picture book, in folders and in workspaces. You can add pictures using all document creation means:

- **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. EEXIF 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.

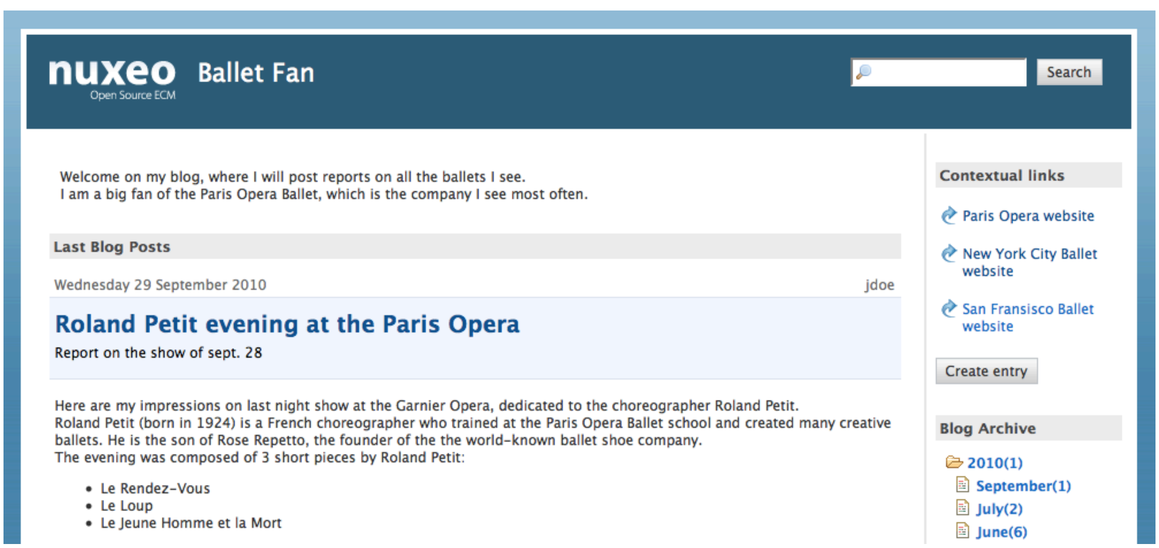


Whatever the folder they have been created in, their behaviour and the actions available are the same: you will be able to preview and annotate them, link them to other documents, tag them, publish them and subscribe to email alerts. Note that workflow is not available on pictures.

Websites and blogs

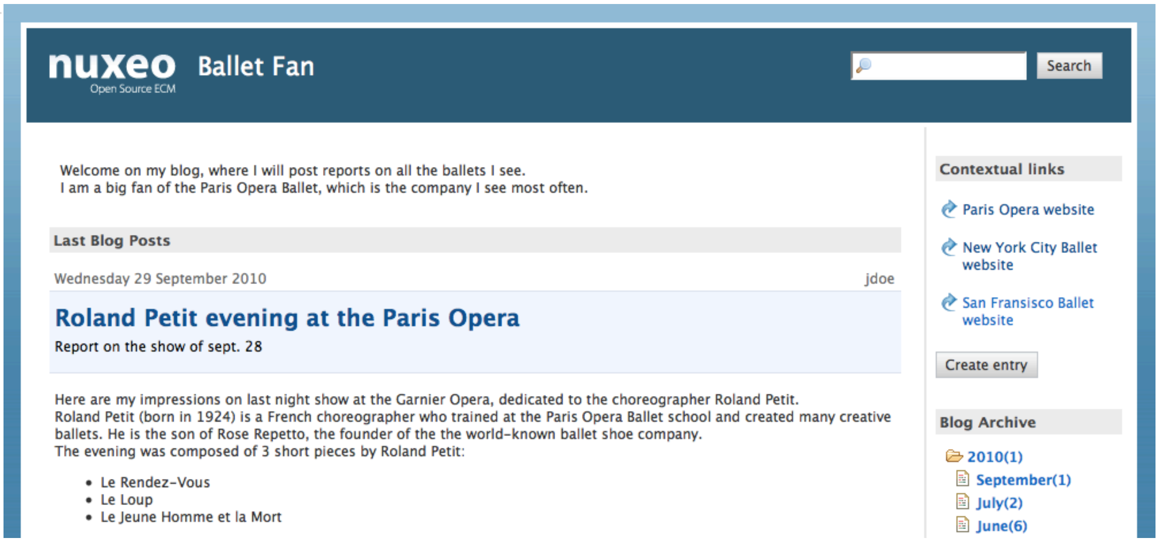
Websites and Blogs are collaborative documents that are web publishing oriented. As so, they have a second interface that makes it easy to display the documents of a workspace to the public. These specific presentations are built using Nuxeo WebEngine.

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.

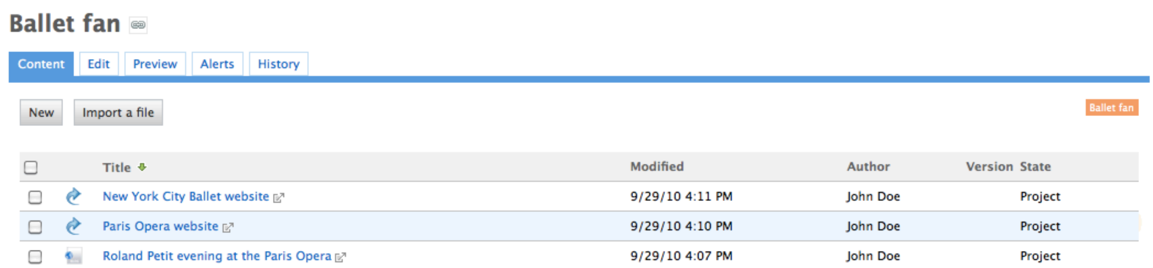


Blogs

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.



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).



In this section, we will see how to:

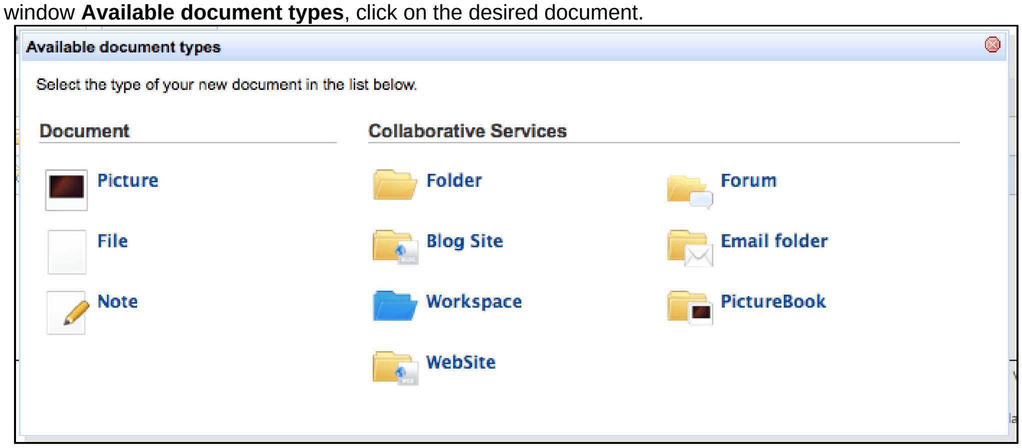
- Create a blog
- Add content to your blog
  - Add a blog post
  - Add a contextual link

Create 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:

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.

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 your 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).

Add content to your blog

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

Add 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.

Add a contextual link

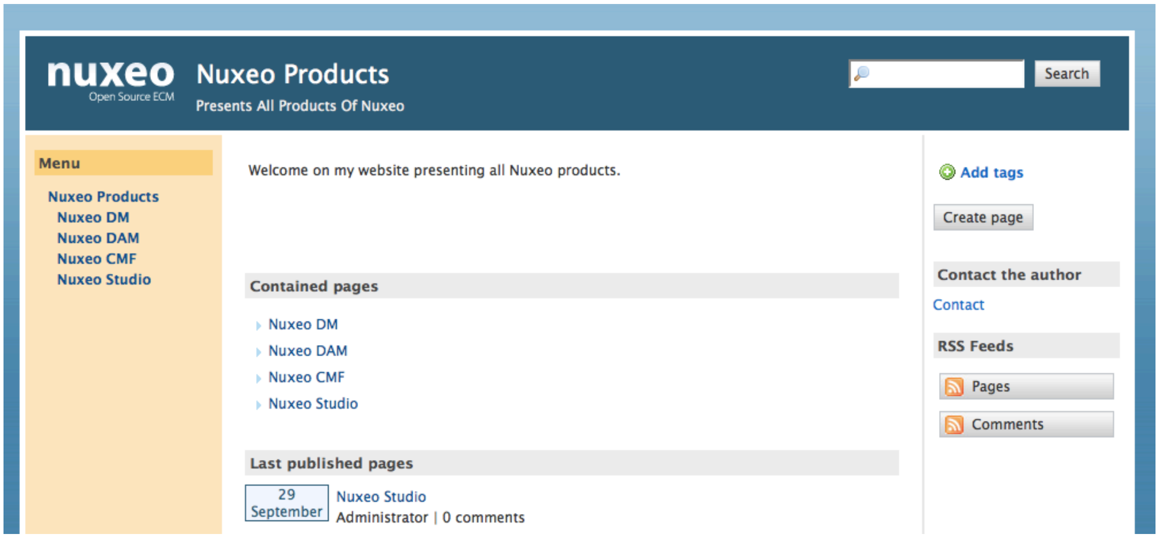
Contextual links are links displayed on the blog's home page.
They can be added from the blog's back-office only.

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.

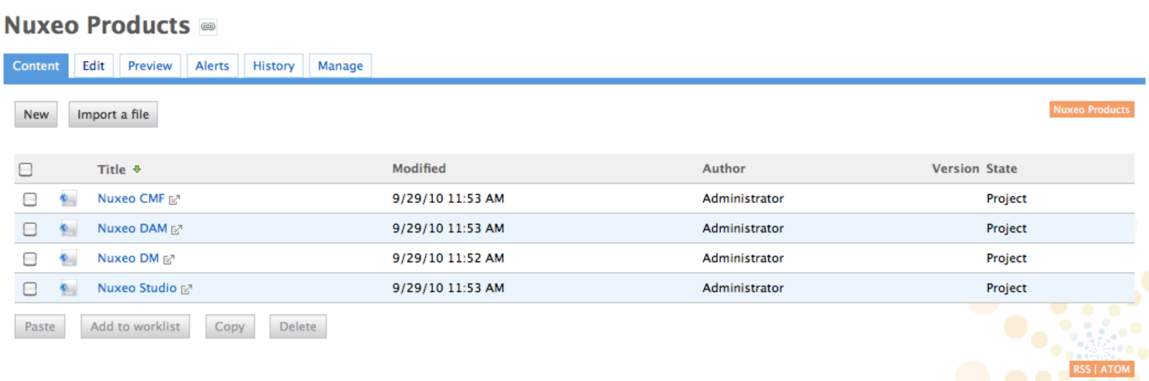
Websites

Websites are documents is 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).



In this section, we will see how to:

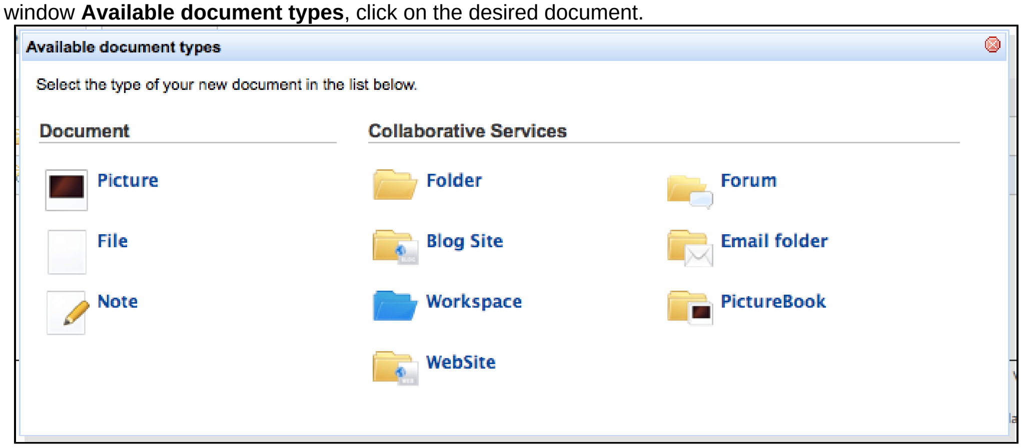
- Create a website
- Add content to a website
    - Add a webpage
    - Add a contextual link
- Manage the access to the website

Create 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:

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.

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 (beforhand moderation) or if they are published immediately (afterwards moderation).

Add content to a website

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

Add 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.

Add 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.

Manage 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 Manage access rights).

However, websites have specific access rights:

- Comment
- Moderate

In a website, users with "Read" write cannot comment on pages unless they are explicitely 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

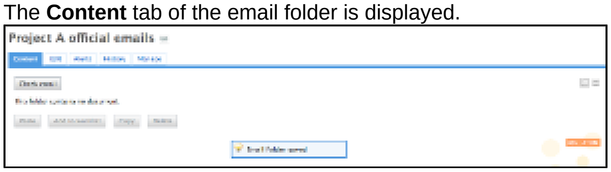
Email folders are folders in which you can fetch emails to store and share them in your Nuxeo DM application.
The email folder is not intented to be a webmail. It will fetch the unread emails on your email server when you manually trigger the fetch from Nuxeo DM interface.
When emails are imported in 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.

Create 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

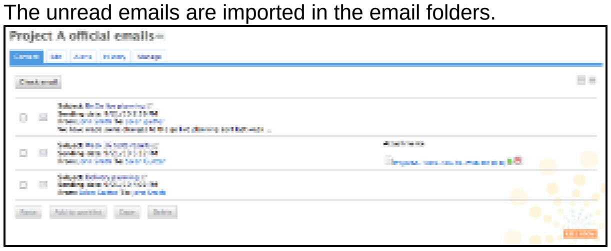
Field	Description
Title	Name of your email folder
Email	Email address of the account from which the emails will be fetched.
Password	Password of the email account from which the emails will be fetched.
Protocol	Select the receive protocol used for the email account.
Host	Type the name of the host of 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.

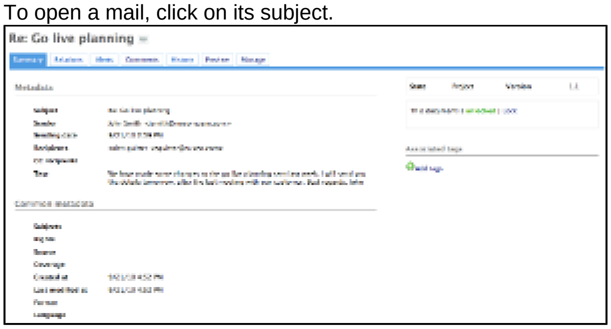
The actions available on an email folder are:

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

Fetch 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.
   

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

Emails cannot be edited, but you can comment and annotate them, link them to other documents and subscribe to alerts.

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 can also manage vocabularies, i.e. the labels displayed in drop down lists.

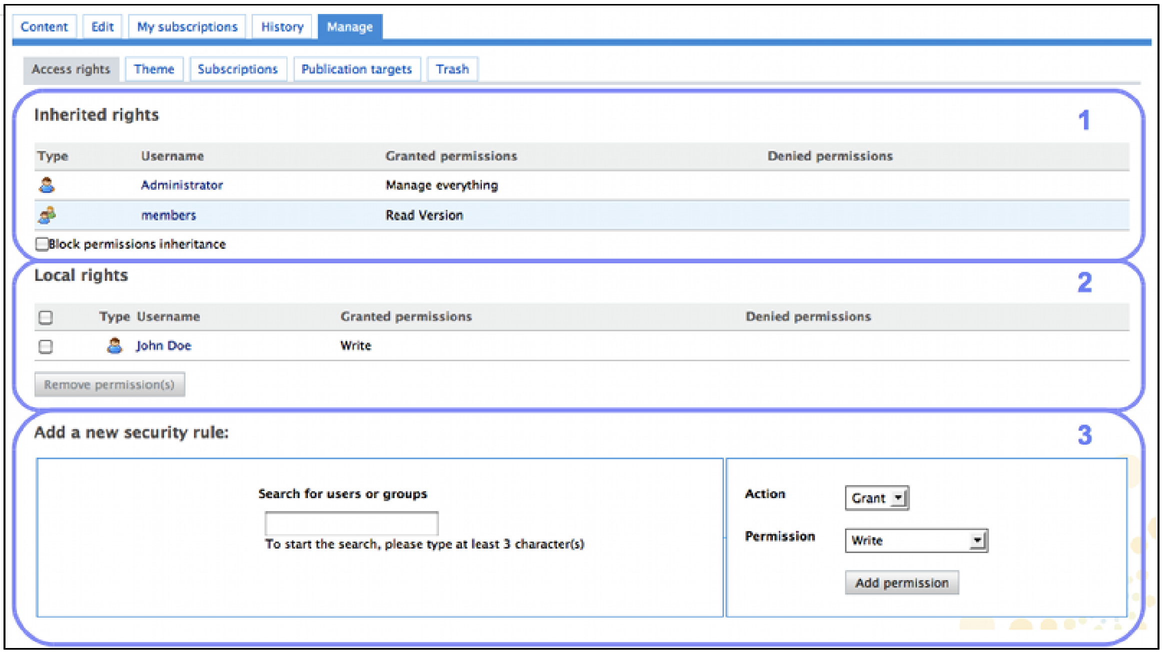
At a space level, space managers are in charge of managing access rights.

Manage 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.

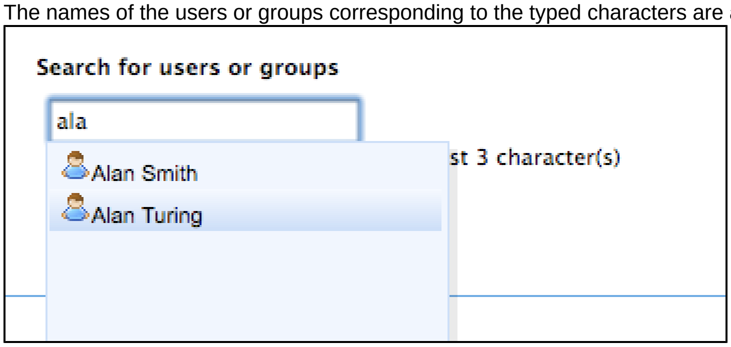
The access rights management sub-tab is accessible composed of three parts:

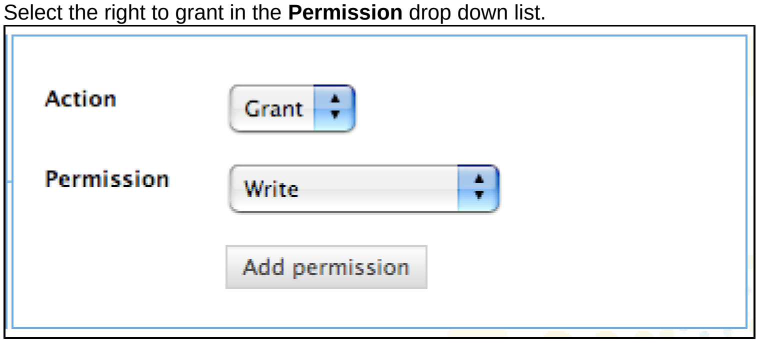


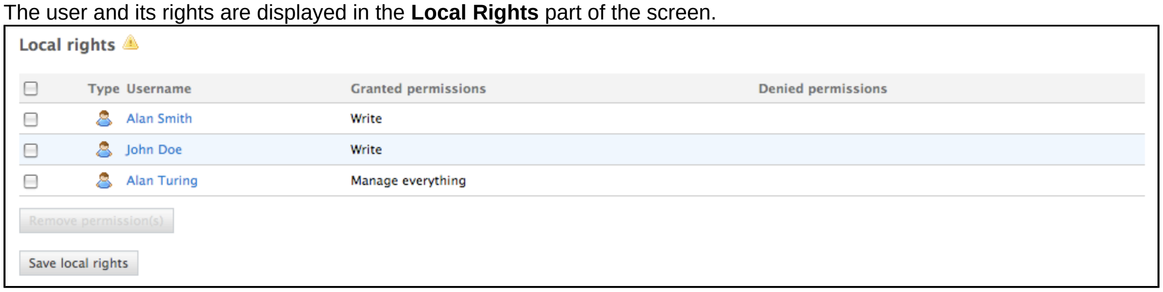
1. the **Inherited rights** part displays rights that were granted or denied in a parent space;
2. the **Local rights** part displays the rights that were granted or denied in the current space;
3. the form to grant or deny access rights in the current space.

Grant 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.
   

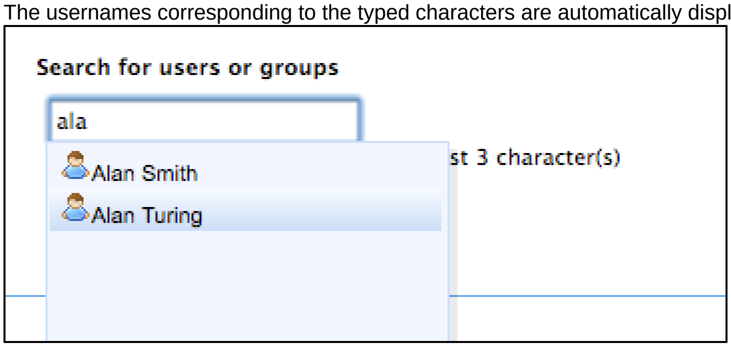
5. Click on the **Add permission** button.
   The user and its rights are displayed in the **Local Rights** part of the screen.
   

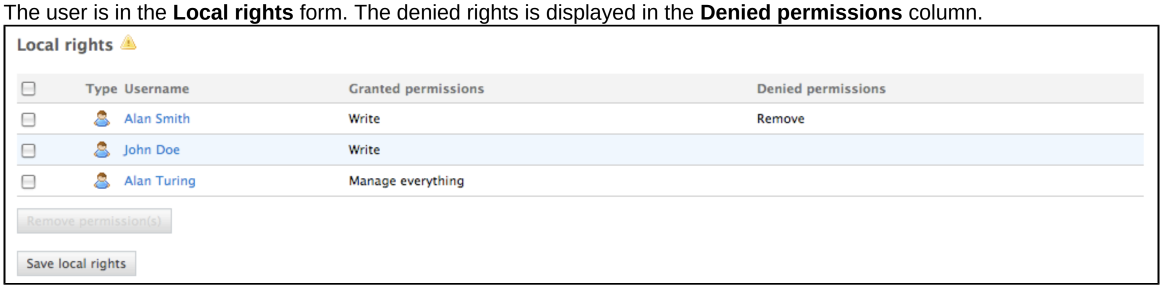
6. Save local rights modification by clicking on the **Save local rights** button.
   Local rights are saved and applied.

Deny 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:

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 deny access rights to a group, type the group's name.
   The usernames corresponding to the typed characters are automatically displayed.
   

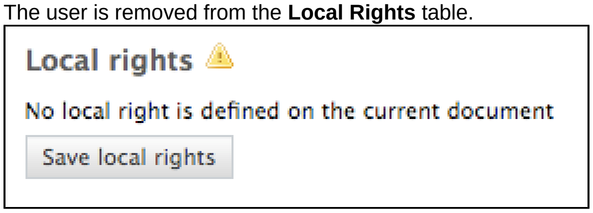
3. Click on the user you want to deny rights to.
4. Select the right to deny in the **Permission** drop down list.
5. Click on the **Add permission** button.
   The user is in the **Local rights** form. The denied rights is displayed in the **Denied permissions** column.
   

6. Save local rights modification by clicking on the **Save local rights** button.
   Local rights are saved and applied.

Remove 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.
   

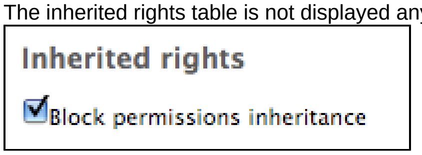
4. Save local rights modification by clicking on the **Save local rights** button.
   Local rights are saved and applied.

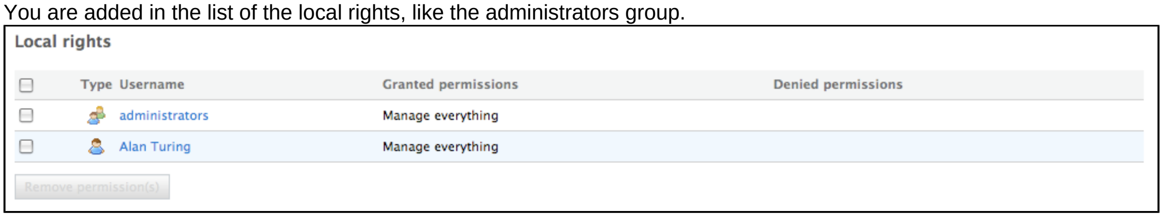
Block rights inheritance

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.
   

   In the **Access Rights** tab of the possible sub-workspaces of the workspace whose rights are blocked, a group Everyone is denied all rights.
   

   You can now grant access rights to users.

Manage groups

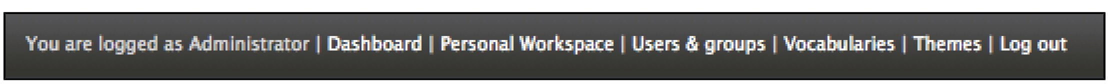
Groups of users can be created and their properties modified directly in Nuxeo DM. Groups of users are used to manage access rights more easily.

There are two default groups in Nuxeo DM:

- *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.

Users and groups directories are available using the **Users & groups** link in the page header.



Groups parameters

Field	Description
Group name	The name of the group is its ID.
Group's members	Users that belong to the group.
Sub-groups	Groups that belong to the group.

Create a group

Only administrators can create groups of users.

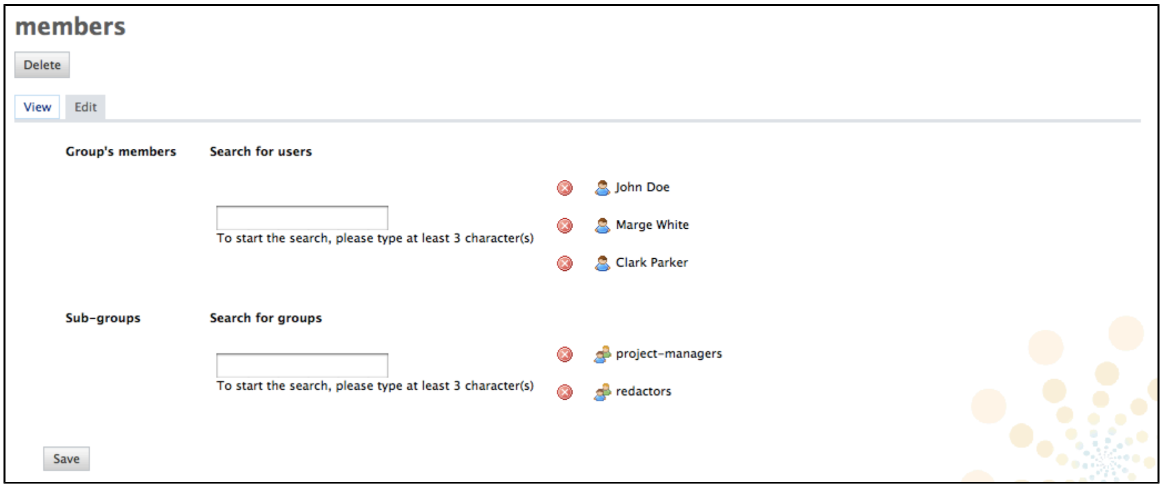
To create a group of users:

1. Click on the **Users & groups** link in the page header.
   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.

Edit a group

Only administrators can modify groups.

Modifying groups consists in adding or removing members of the group. The name of the group cannot be changed.



To edit a group:

1. Click on the **Users & groups** link in the page header.
   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.

Delete a group

Only administrators can delete groups.

To delete a group:

1. Click on the **Users & groups** link in the page header.
   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.

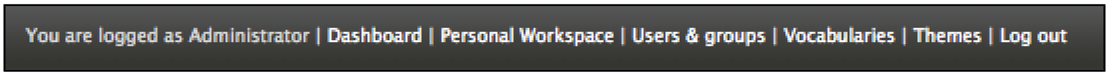
Manage users

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 Nuxeo DM to an external directory (LDAP directory for instance). This procedure is explained in the Nuxeo EP Reference Guide.

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.

Users and groups directories are available using the **Users & groups** link in the page header.



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	

Create a user

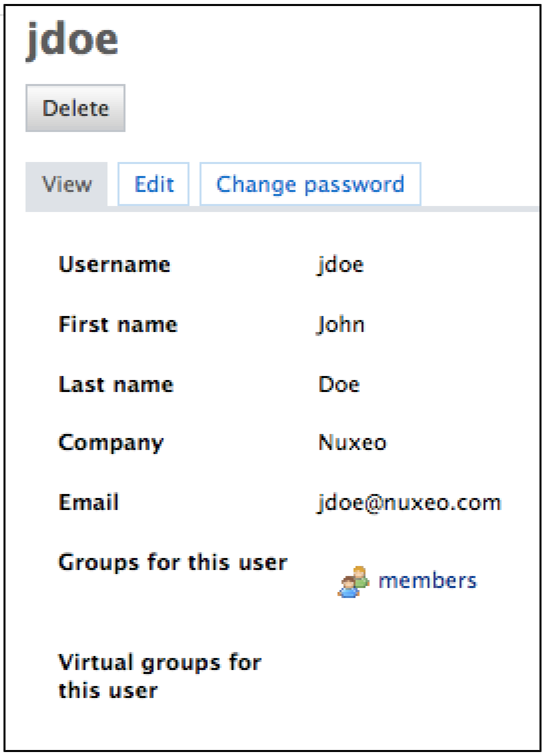
Only administrators can create new users.

By default, Nuxeo DM has one user, called Administrator. This user is the administrator. You must use this user to create new users and delegate them access right.

User 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:

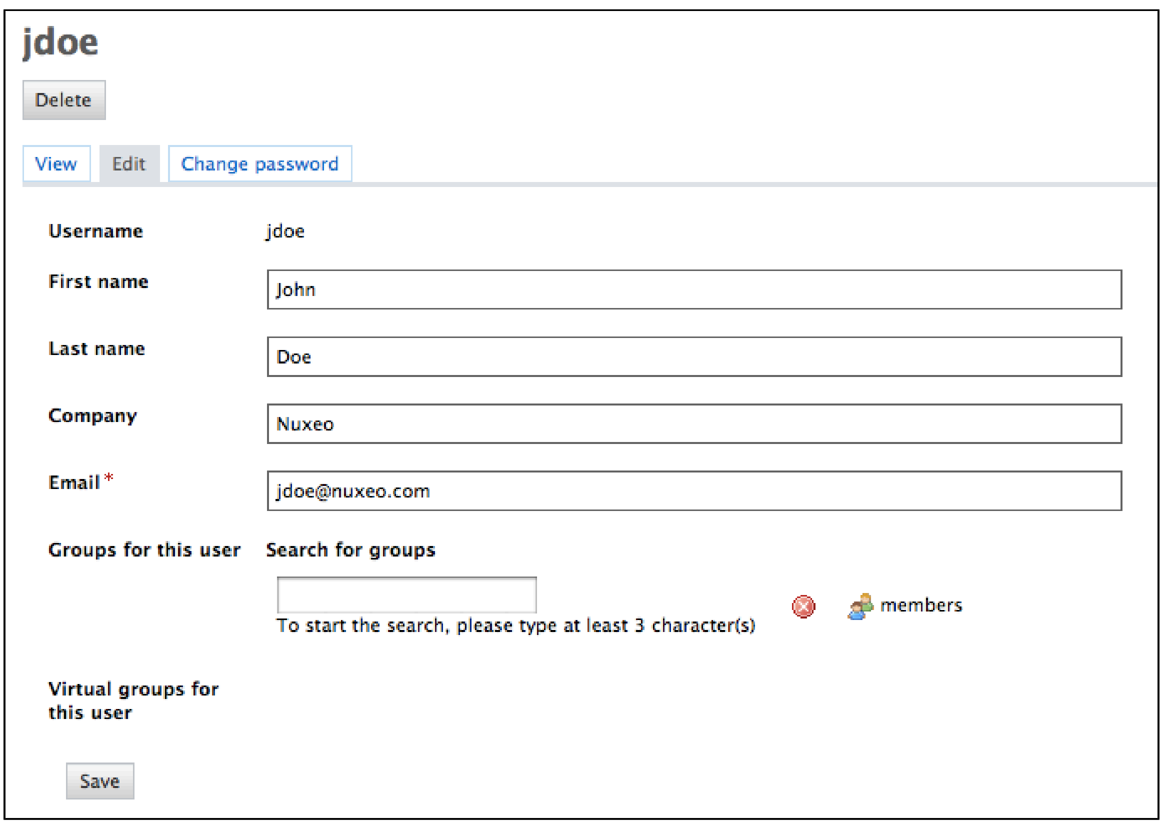
1. Click on the **Users & groups** link in the page header.
   The members management interface opens on the user directory search form.
2. Click on the **Create a new user** button.
3. Fill in the user creation form.
   Mandatory fields are indicated by a red asterisk.
4. Click on the **Save** button.
   The card of the new user is displayed. You can modify its properties and its password.
   The user can immediately connect to the Nuxeo DM application using his or her username and password.



Edit a user's properties

Only administrators can modify other users' properties. But every user can modify his or her own properties.

You cannot edit the username, as it is the ID of the user on the application.



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 **Users & groups** link in the page header.
   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.

Change 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.

To modify a user's password:

1. Click on the **Users & groups** link in the page header.
   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.

Delete a user

Only administrators can delete users.

Deleting a user is a permanent action.

To delete a user:

1. Click on the **Users & groups** link in the page header.
   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 DM application.

Manage vocabularies

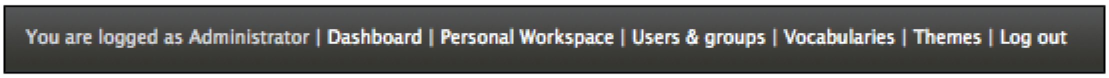
Only administrators can consult and manage vocabularies.

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.

Consult vocabularies

You can consult the vocabularies from any page of the application by clicking on the **Vocabularies** link in the page header.

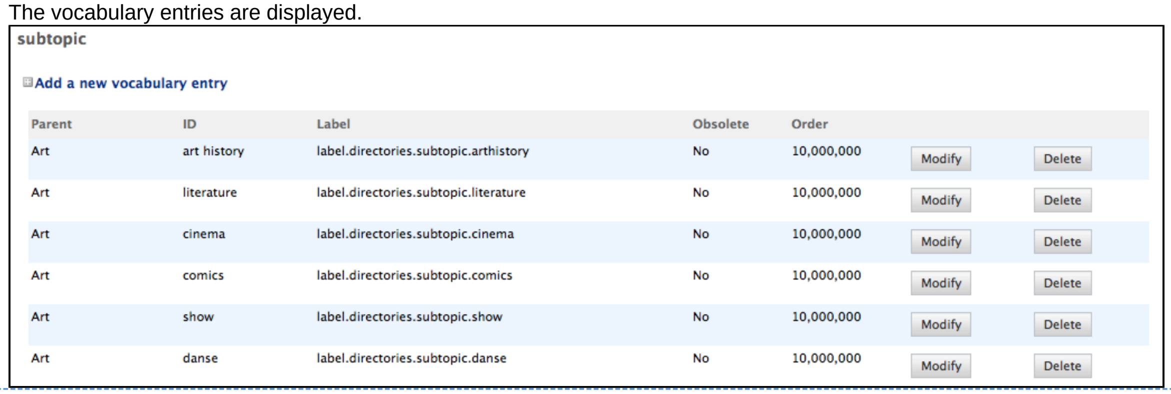


All vocabularies editable from user interface are listed in the vocabularies management interface.

To consult a vocabulary or its entries:

1. Click on the **Vocabularies** link, located at the top of the page.
   The list of the application vocabularies is displayed.

2. Click on the name of the vocabulary you want to consult.
   The vocabulary entries are displayed.


subtopic

Add a new vocabulary entry

Parent	ID	Label	Obsolete	Order		
Art	art history	label.directories.subtopic.arthistory	No	10,000,000	Modify	Delete
Art	literature	label.directories.subtopic.literature	No	10,000,000	Modify	Delete
Art	cinema	label.directories.subtopic.cinema	No	10,000,000	Modify	Delete
Art	comics	label.directories.subtopic.comics	No	10,000,000	Modify	Delete
Art	show	label.directories.subtopic.show	No	10,000,000	Modify	Delete
Art	danse	label.directories.subtopic.danse	No	10,000,000	Modify	Delete

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.

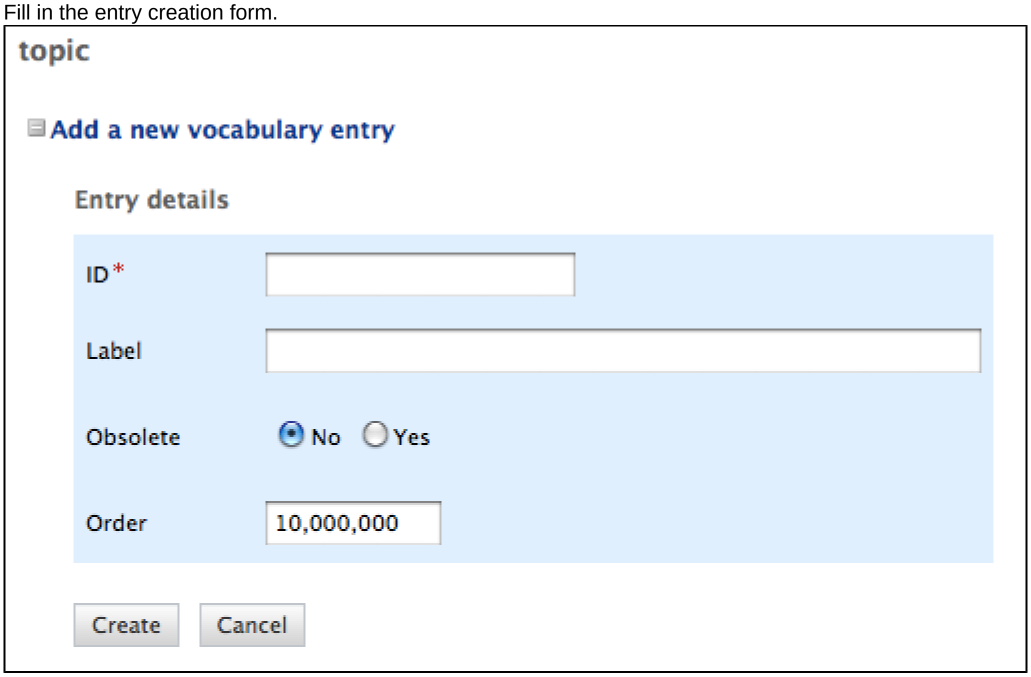
Edit vocabularies

When you modify a vocabulary, you can add new entries, edit or delete them.

Add 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.

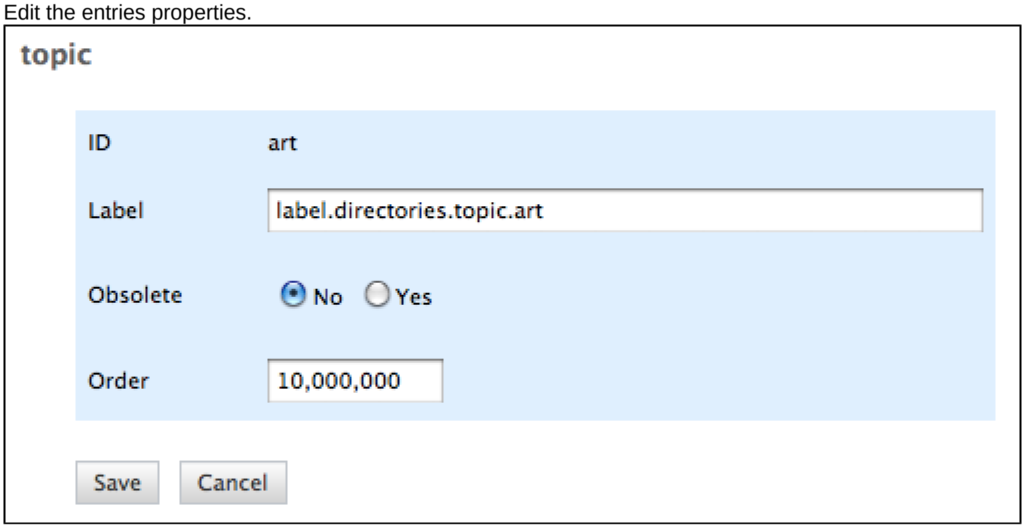
Edit a vocabulary entry

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.

Delete 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.

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.

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In this section, we will see:

- Submit a document to publishing
- Approve document publishing
- Reject document publishing
- Unpublish documents

Submit a document to publishing

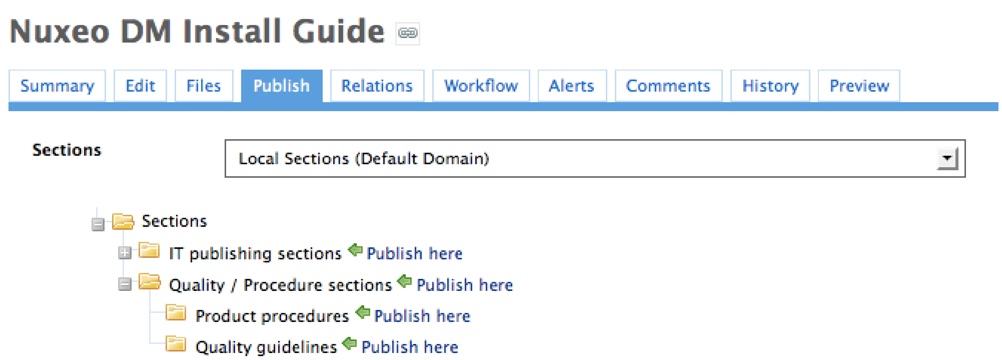
Only users with writing or management rights in the workspace can submit a document to publication.

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.

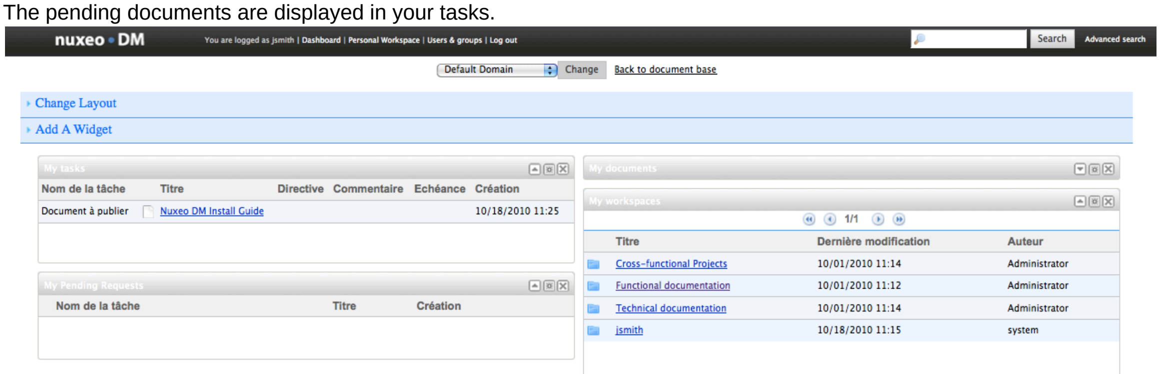
Approve document publishing

Users with write and management rights in the section can approve the publishing of a document.

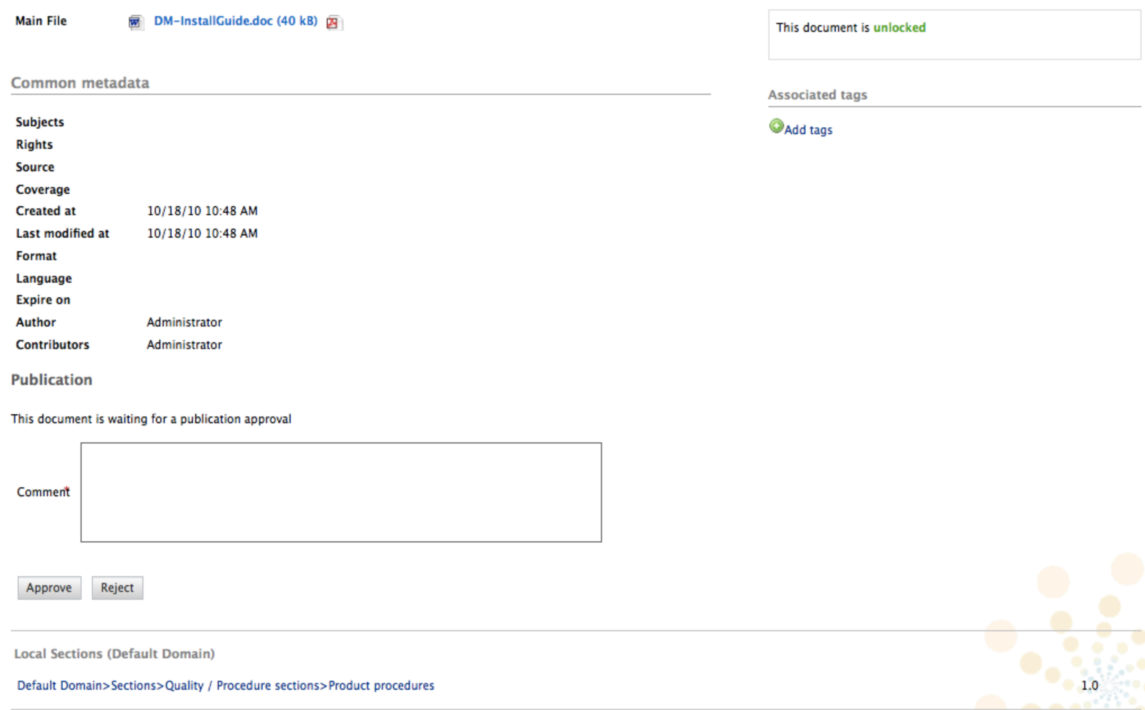
When a document is submitted to publication in a section in which you have management rights, it is displayed in your dashboard. You must then approve or reject the document.

To publish a document:

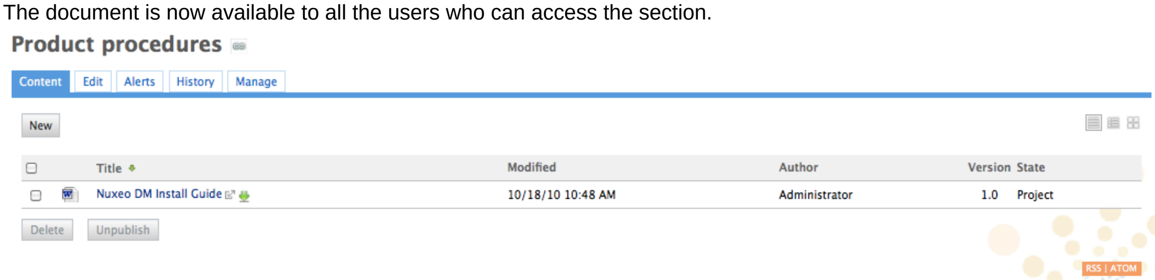
1. Click on the **Dashboard** link in the top right corner of the window, to open your dashboard.
   The pending documents are displayed in your tasks.



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.



   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.



Reject document publishing

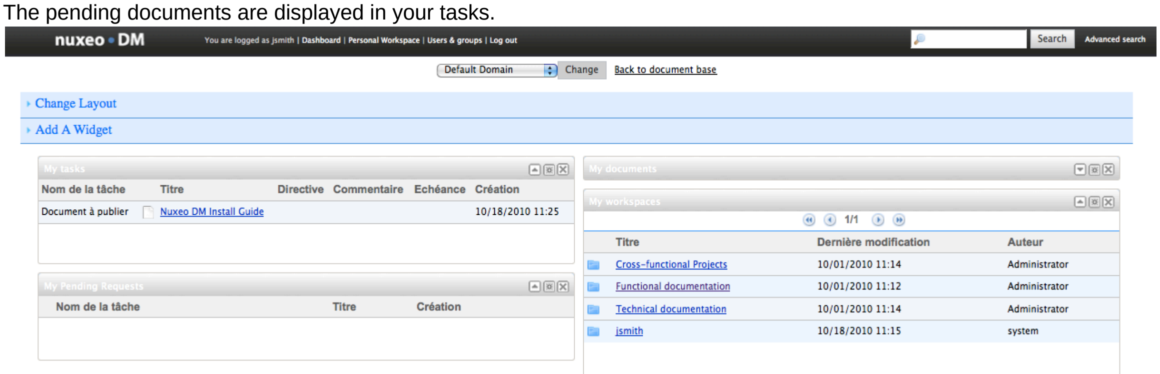
Only users with write and management rights in the section can reject the publishing of a document.

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.

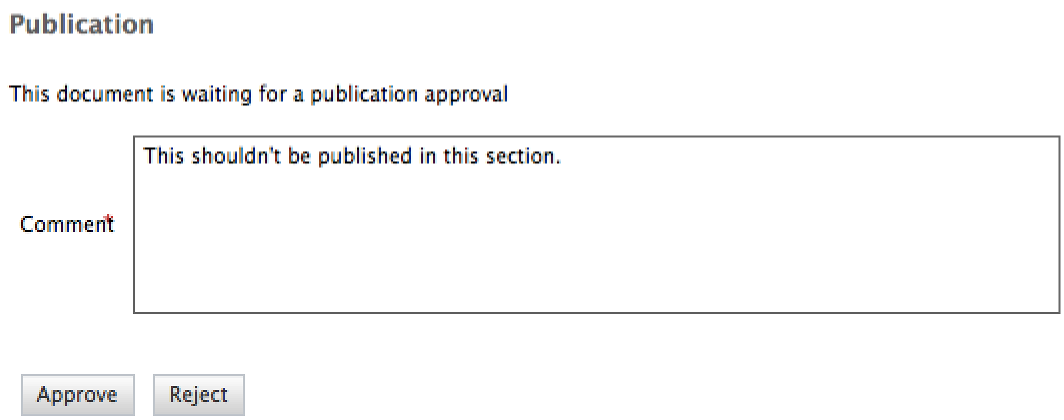
Only users with write and management rights can see the pending document in the section.

To reject a document:

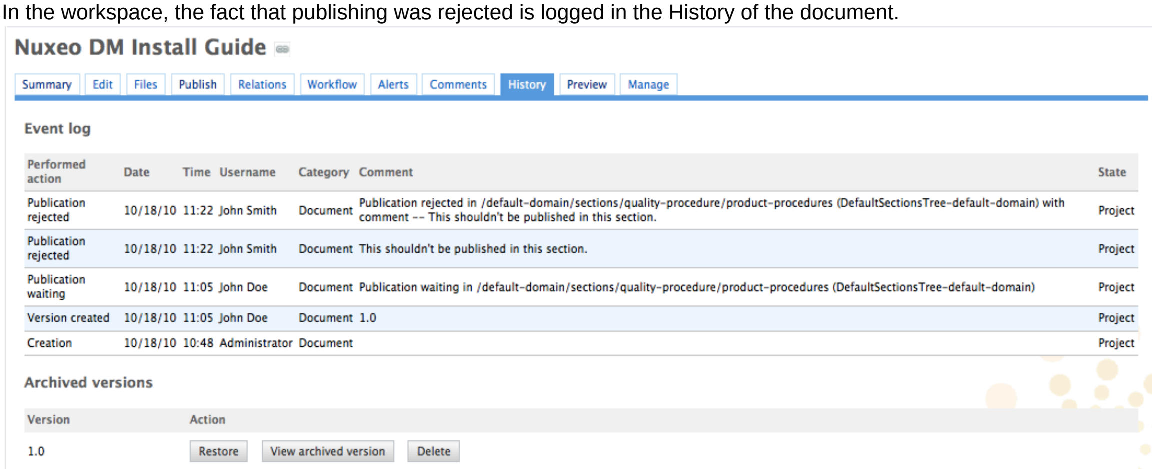
1. Click on the **Dashboard** link in the top right corner of the window, to open you dashboard.
   The pending documents are displayed in your tasks.



2. Click on the pending document.
   The document opens in the section. It has a **Publishing** part that has a **Reject** and a **Publish** buttons.
3. Type a comment explaining why you reject the document publication. This comment is mandatory to reject the document publishing.



4. 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.



Unpublish documents

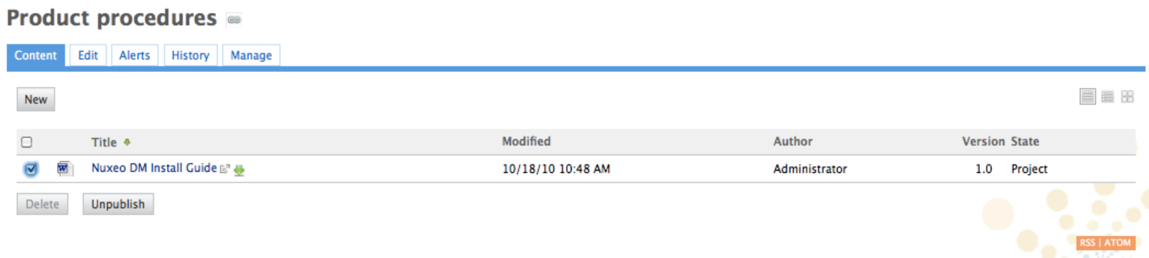
Only users with writing or management rights can unpublish a document from a section.

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.



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.