User Documentation

Nuxeo Platform 5.8

LTS Version

Table of Contents

Nuxeo Platform User Documentation

User Guide for Nuxeo Platform 5.8

The Nuxeo Platform is a modular content management platform that enables developers to create business applications to manage specific types of content. Several tools are available to develop business applications on top of the Platform, like Nuxeo Online Services for the customization and configuration of the Platform, or Nuxeo IDE to help developers design new features. The Nuxeo Platform itself comes with several modules, dedicated to a generic content management use case and help manage and track the flow of content through the business cycle, from capture and creation, to sharing, to approval and publishing. These modules can be used out-of-the-box or as a basis for customization.

The naked Platform provides a default set of document management features and can be enriched by the modules below:

- Document Management, which provides additional document management features,
- Social Collaboration, which provides project and user-centric views of content,
- Digital Asset Management, which provides browsing and edition features adapted to multimedia content.

Addons are also available from the Nuxeo Marketplace, from which you can download and install optional product plugins.

You will find in this documentation all the guides to help you work with the different modules and addons of the Nuxeo Platform. For installation and administration of the Platform and its modules and addons, you can refer to the Installation and Administration Guide.

The Nuxeo Platform 5.8 User Documentation available:

- Digital Signature
- Document access tracking
- Nuxeo Agenda
- Nuxeo - BIRT Integration
- Nuxeo CSV
- Nuxeo DAM PDF Export
- Nuxeo Diff
- Nuxeo Drive
- Nuxeo Groups and Rights Audit
- Nuxeo jBPM
- Nuxeo Jenkins Report
- Nuxeo Multi-Tenant
- Nuxeo Platform Explorer
- Nuxeo Platform User Registration
- Nuxeo Poll
- Nuxeo Quota
- Nuxeo Sites and Blogs
- Nuxeo Web Mobile
- Smart Search
- Template Rendering Addon
- Unicolor Flavors Set
- Nuxeo Shared Bookmarks
- Nuxeo RSS Reader
- Nuxeo DuoWeb Two-Factor Authentication

Available PDF versions

Download this documentation in PDF.

Download the French PDF version.

Recently updated

Recently Updated

Document Management
- updated Sep 14, 2016 • view change

Document Management Concepts
- updated Sep 02, 2016 • view change

Nuxeo Platform User Registration
- updated Sep 02, 2016 • view change

Nuxeo Quota
- updated Sep 02, 2016 • view change

Folders
- updated Sep 02, 2016 • view change

Dashboard
- updated Sep 02, 2016 • view change

Advanced Search
- updated Sep 02, 2016 • view change

Smart Search
- updated Sep 02, 2016 • view change

Annotations and Preview
- updated Sep 02, 2016 • view change

Simple Search
- updated Sep 02, 2016 • view change

Nuxeo Platform Modules Overview

The Nuxeo Platform has four modules available that enable you to easily add sets of features to the default content management functionalities, to adapt it to a specific content type management:

- the Document Management (DM) module adds richer document management features to the default features;
- the Digital Asset Management (DAM) module provides import and browsing features adapted to multimedia content;
- the Social Collaboration module adds to social and user-centric features to the DM module, such as mini-messages and networking.

This page explains the main features of each module. For the detailed list of features, you can refer to the attached table.

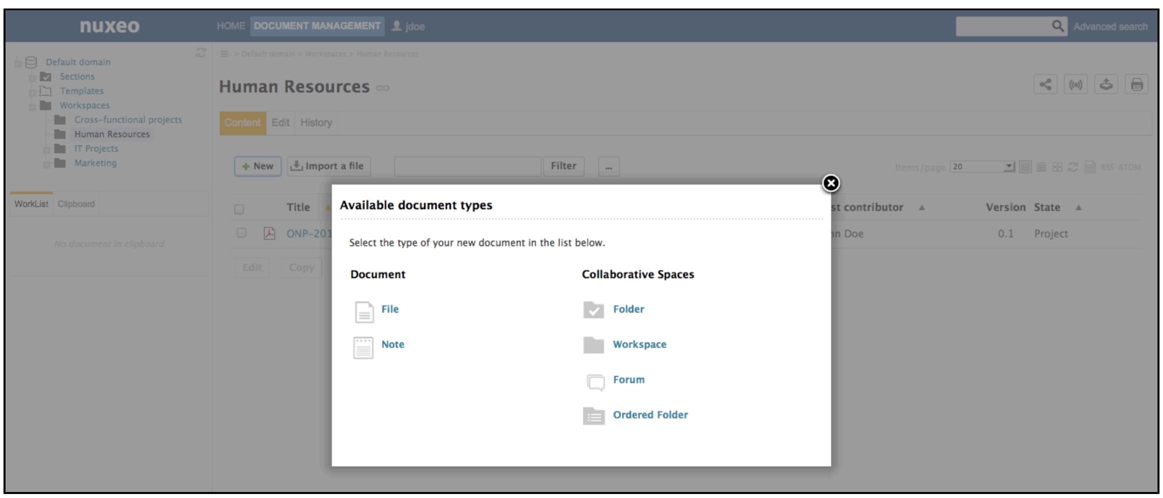
Additional features are available on the Marketplace, as ready-to-install packages.

On this page

Content Application Platform

The Nuxeo Platform includes a set of document management features by default, that are available even if you do not install any module. The naked Platform is called "Content Application Platform". The naked Platform includes core content management features such as fundamental document types (file and note for instance), with a set of metadata, their lifecycle, and most common document management features. The Content Application Platform also defines a tree structure that is very often required for document management projects, with spaces dedicated to the collaborative work and document edition (workspaces) and spaces dedicated to the distribution of documents (sections).

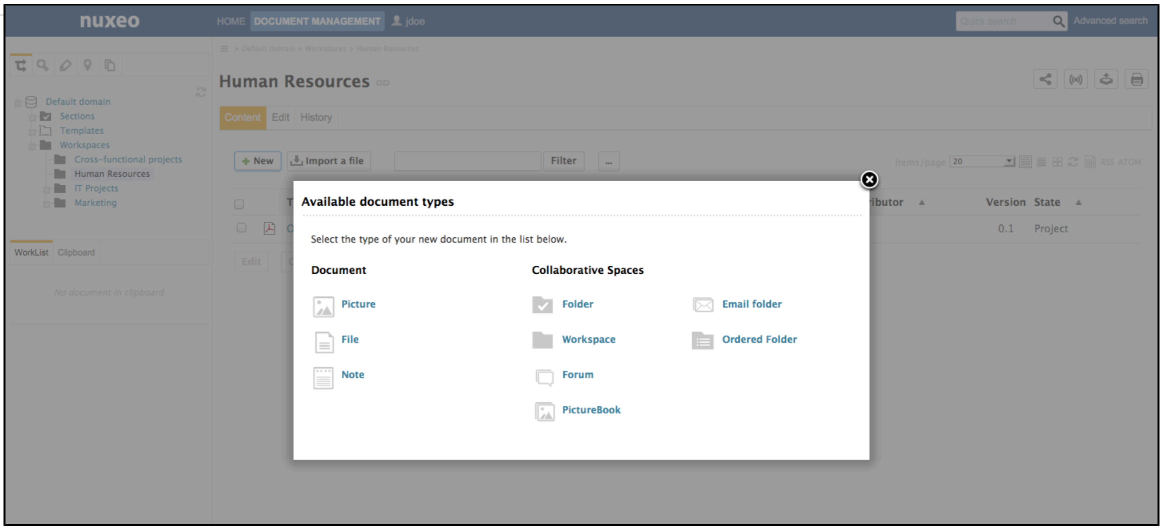
The naked Platform can be extended easily by one of the modules below or a package available from the Marketplace.



Document Management Module

The Document Management module, also known as DM, brings more advanced and richer document management features to the Platform. Among these, of course, it adds new document types, like pictures. It also provides new ways to enrich and access documents. Users can tag documents with their own key words and find documents using these key words using the tag cloud. The virtual navigation also allows them to browse documents from their metadata and the faceted search form enables them to save and share their searches to easily reuse them. The OpenSocial dashboard also facilitates the access to documents by providing more gadgets and enabling users to customize their dashboard, choosing which gadgets are displayed and where. The Document Management module also comes with a document preview, the possibility to annotate the document from the preview and to compare two documents or two versions of a document.

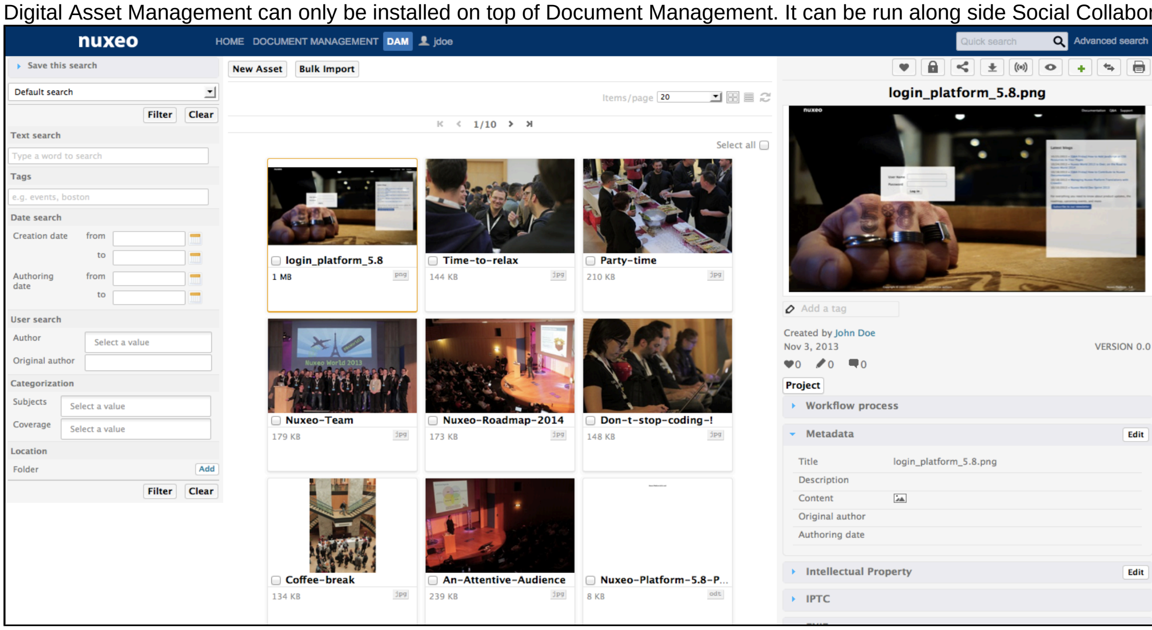
Document Management doesn't required any other module, and can be installed along side Social Collaboration and Digital Asset Management.



Digital Asset Management Module

The Digital Asset Management module, also known as DAM, adds an environment dedicated to multimedia content to the Platform, while benefiting from the features provided by the naked Platform and possible other modules installed. Pictures, Videos and Sound documents are supported, with their specific metadata, and automated processes are run upon import. EXIF and IPTC metadata are extracted and a series of thumbnails that segment the contents of video is generated.
Browsing is adapted to the assets, the content of the Asset Library being available in a dedicated environment that displays the documents as thumbnails by default. Features available by default on the Platform or from other modules are also available to manage assets.

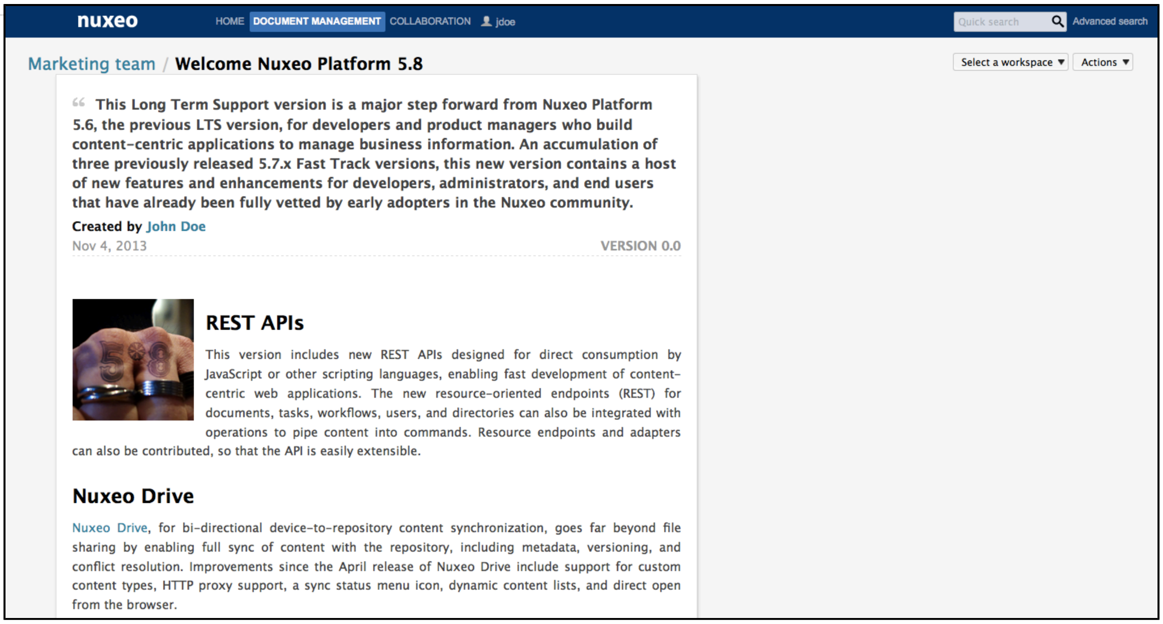
Digital Asset Management can only be installed on top of Document Management. It can be run along side Social Collaboration.



Social Collaboration Module

The Social Collaboration module is a user-centric module that adds social and extended collaborative features to the Document Management module. Content is created in social workspaces, which provide new user-friendly access to documents using dashboards and new gadgets. Users can share documents easily using only the notion of public and private documents, which enables them to create user communities on a project, an event, a theme. To make collaboration even easier, Social Collaboration enables users to create their social network. They can then see the activity stream and mini messages of users in their network, having a quick view from their dashboard of what people are working on.

Social Collaboration can only be installed on top of Document Management.



Nuxeo REST API Module

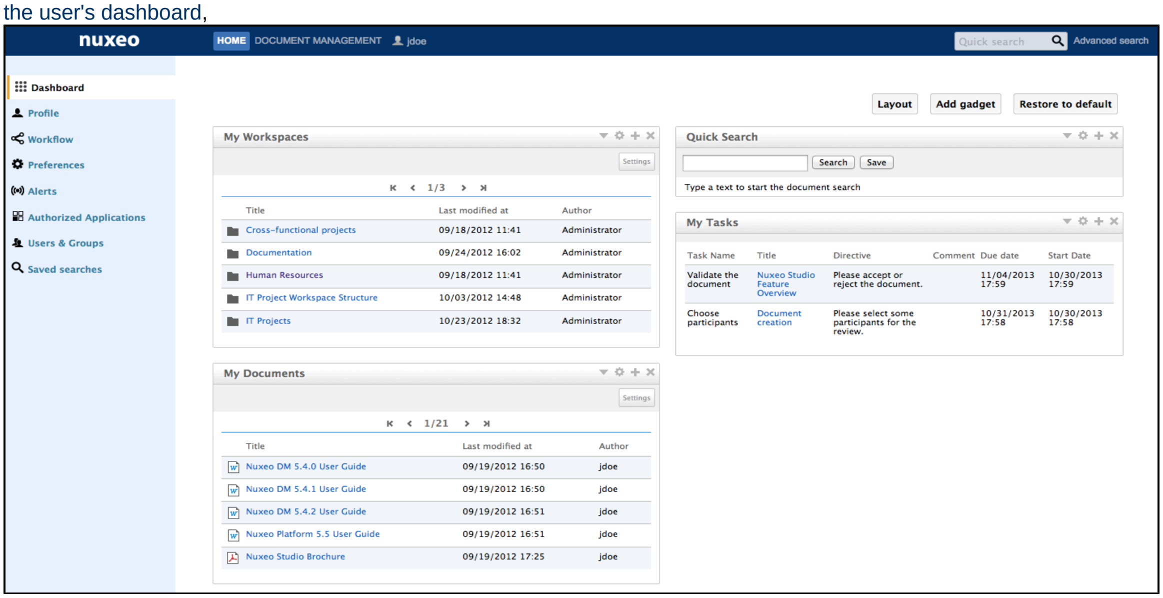
The Nuxeo REST API module is a technical module aimed at enabling developers to easily integrate with the Nuxeo Platform and access the Nuxeo repository.

See the REST API documentation in the Developer Guide for more details.

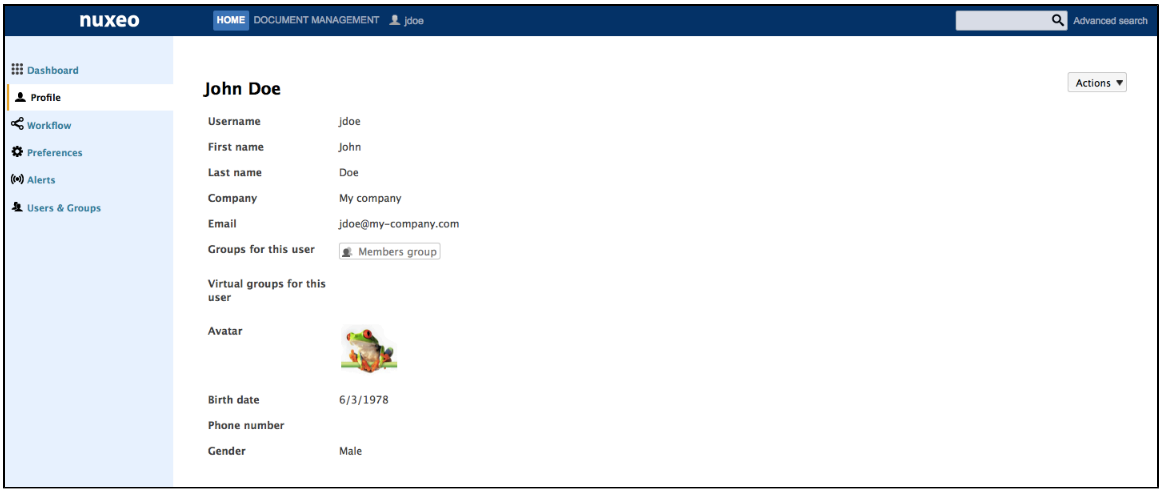
User Home

Users have a **Home** tab, that offers user-centric tabs. Depending on the modules used, the user has access to different tabs. The basic tabs provide access to:

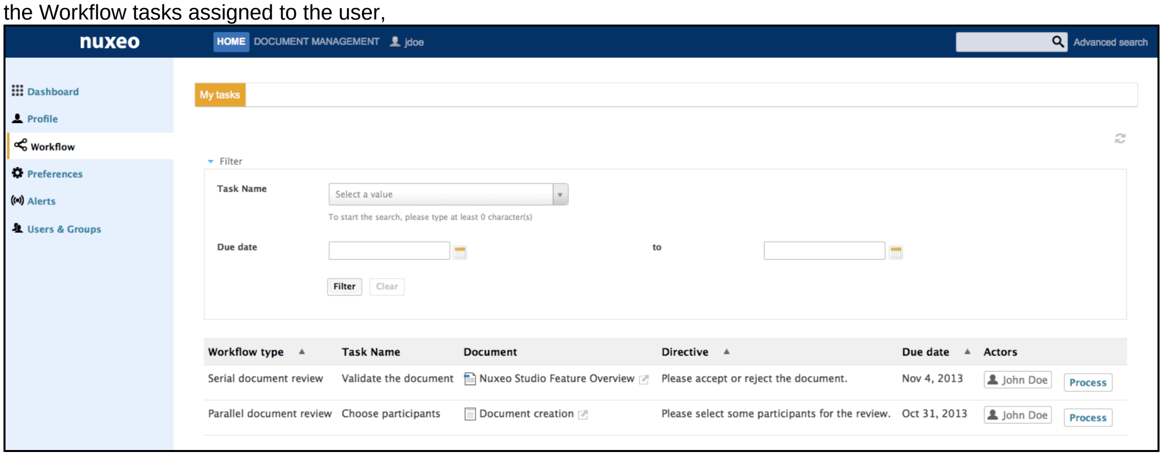
- the user's dashboard,



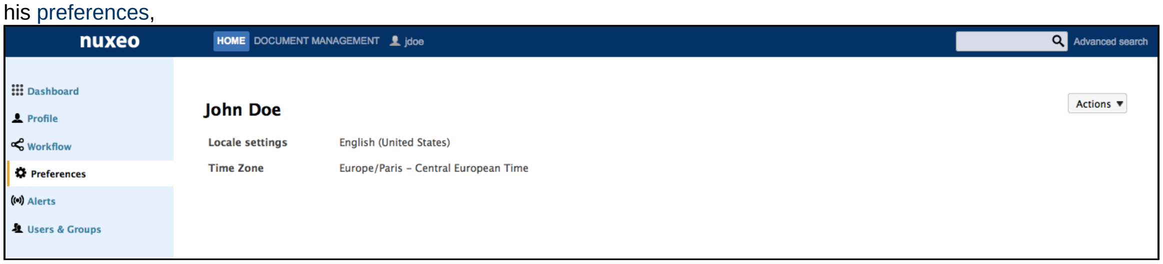
- the user's profile,



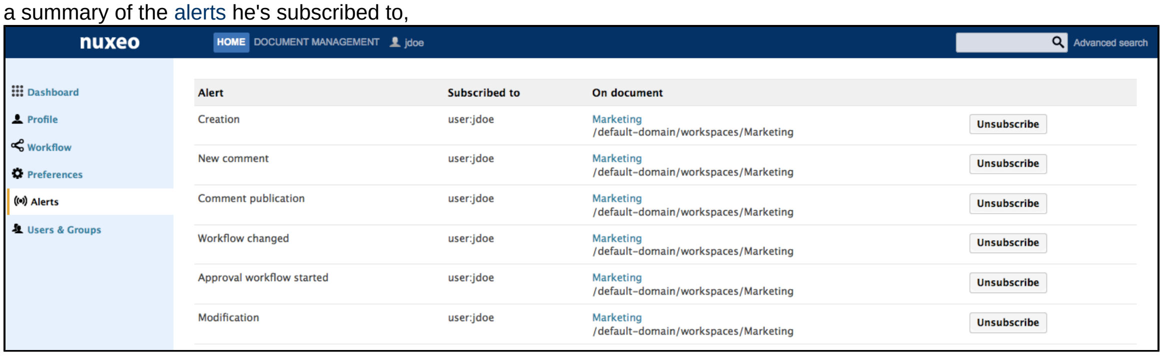
- the Workflow tasks assigned to the user,



- his preferences,



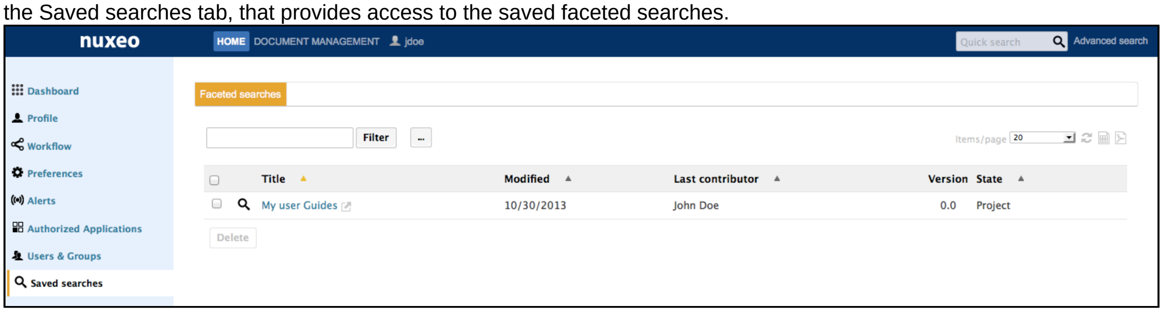
- a summary of the alerts he's subscribed to,



- the users and groups directory.

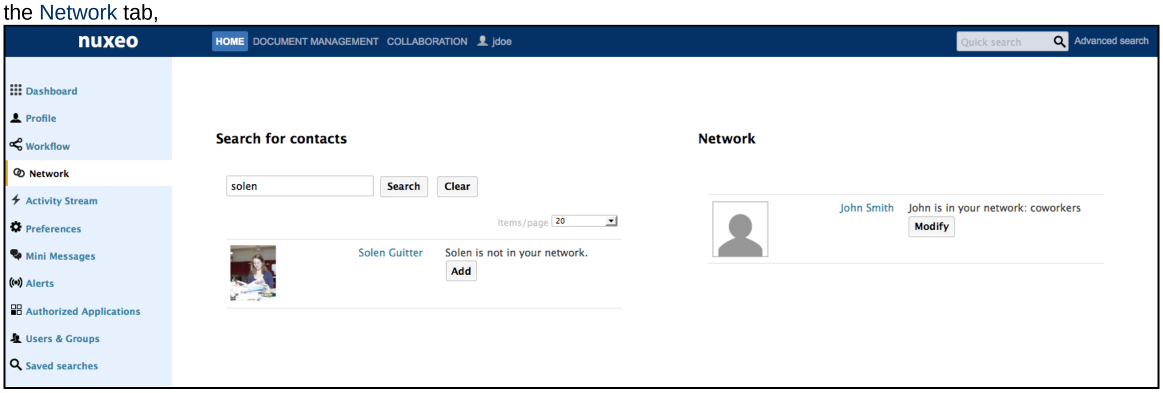
The Document Management module add two tabs:

- the Authorized Applications tab that lists the external applications that can access Nuxeo data, using Nuxeo gadgets for instance,
- the Saved searches tab, that provides access to the saved faceted searches.

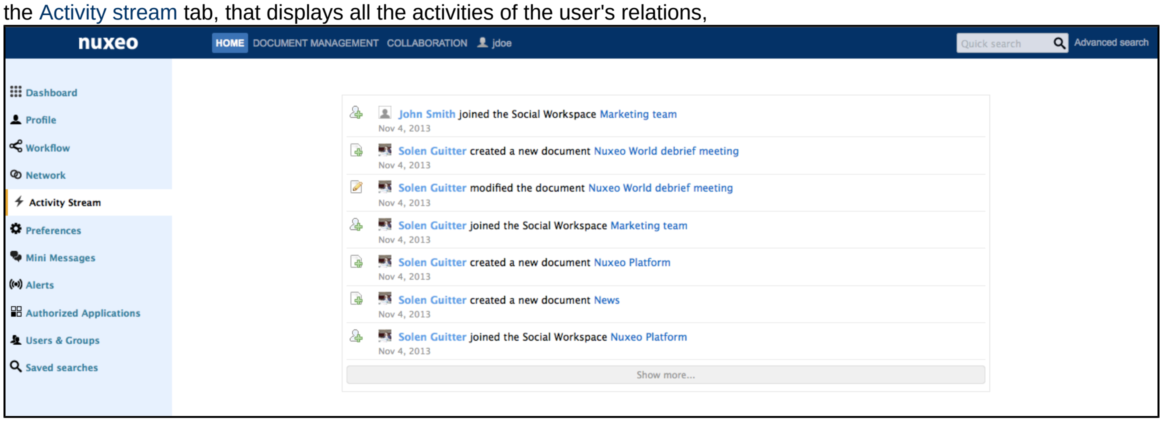


The Social Collaboration module adds three tabs:

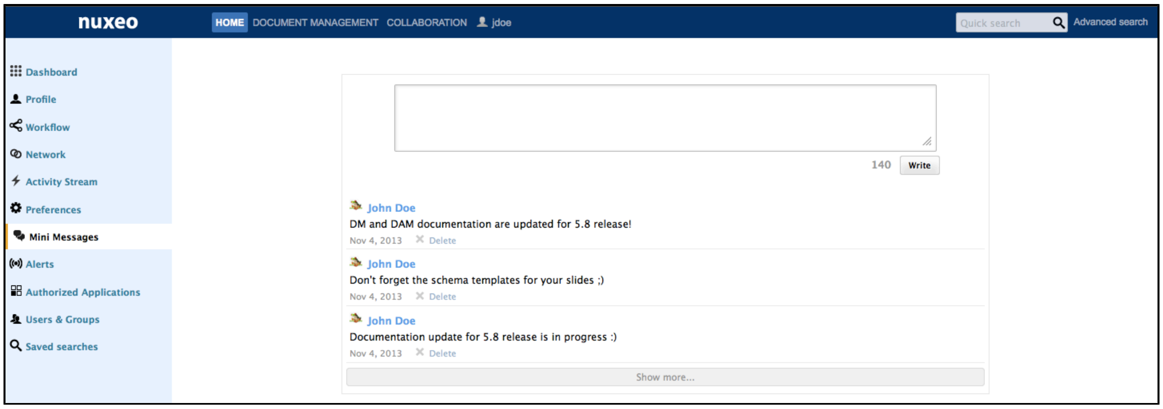
- the Network tab,



- the Activity stream tab, that displays all the activities of the user's relations,



- the Mini messages tab, that displays your relations' mini messages.



Related pages

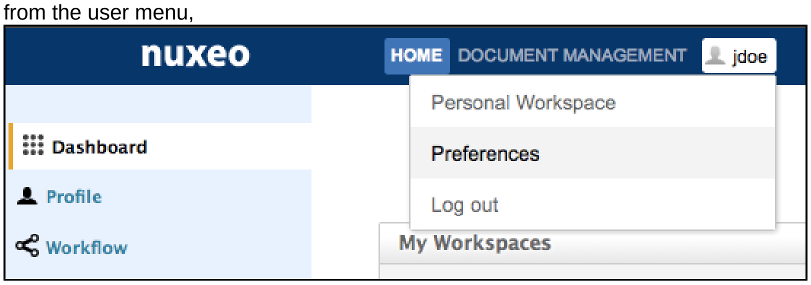
- Dashboard
- Alerts
- Managing Dashboards
- Social Workspaces Overview

User Preferences

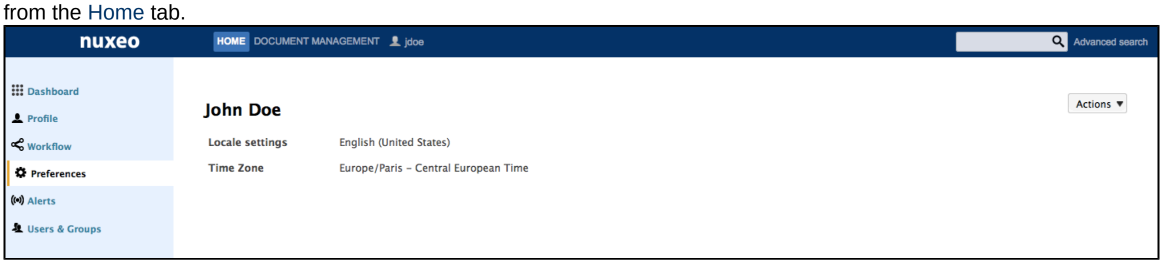
Users can set some preferences that will be used instead of the default browser's default language and the server's time.

User preferences are easily accessible:

- from the user menu,



- from the Home tab.

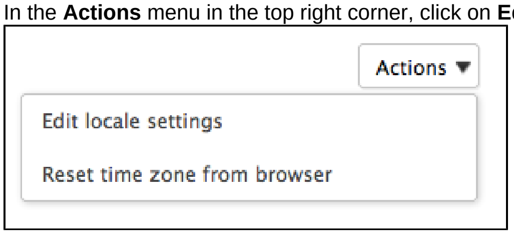


Setting the Language of the Application

By default, when the user browses a web page, the language selected is the browser's default language. However, users may want to browse the content of the Nuxeo Platform in another language without having to select a language every time they log in (which was what they had to do until the version 5.6). The language also determines the formatting of dates (in the history for instance), since dates are not always formatted the same way. For instance, in English dates are written MM/dd/yyyy while in French the format is dd/MM/yyyy.

The Nuxeo Platform user interface is available in several languages. However, only English and French translations are provided by Nuxeo. Other languages are contributions from the community. If some labels are not available in the wished language, the English label is automatically displayed.

To change the language of the Nuxeo Platform interface:

1. Click on the **Preferences** tab in the Home or on the **Preferences** item in the user menu
2. In the **Actions** menu in the top right corner, click on **Edit locale settings**.


3. Select the language you want to use.

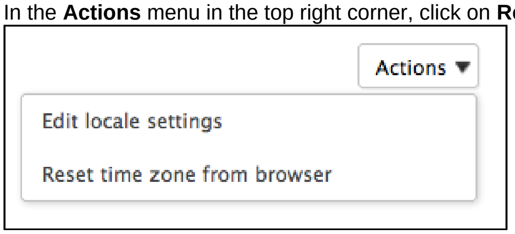

4. Click on **Save**.
The user interface is immediately displayed in the selected language.

Setting the Time Zone

The actions done by users on documents are tracked in the document's history, so it's easy to find who did what on a document, and when. Users can be distributed in different places and possibly in countries in different time zone. But they need to be displayed a time that is relevant to them.

By default, the user's time zone is set from the browser's time, which is the same as the computer's, the first time he logs on to Nuxeo. Should the user change his computer's time zone, the time zone used by Nuxeo is not updated automatically, because the user might want to keep the previous time zone. If not, he can reset it to use the same as the browser's.

To reset the time zone:

1. Click on the **Preferences** tab in the Home or on the **Preferences** item in the user menu
2. In the **Actions** menu in the top right corner, click on **Reset time zone from browser**.


The time zone used on your user interface is immediately changed and all the times displayed are updated accordingly.

Document Management

The Nuxeo Platform offers a set of default content management features to provide organizations with the features they need to enable their teams to manage their documents more efficiently either on a project-basis or on longer term business processes. The Document Management m odule brings additional features to this default set of features.

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

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

Document Management

Document Management Concepts

The Nuxeo Platform and its Document Management module distinguish collaborative work and content distribution.

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

Available spaces

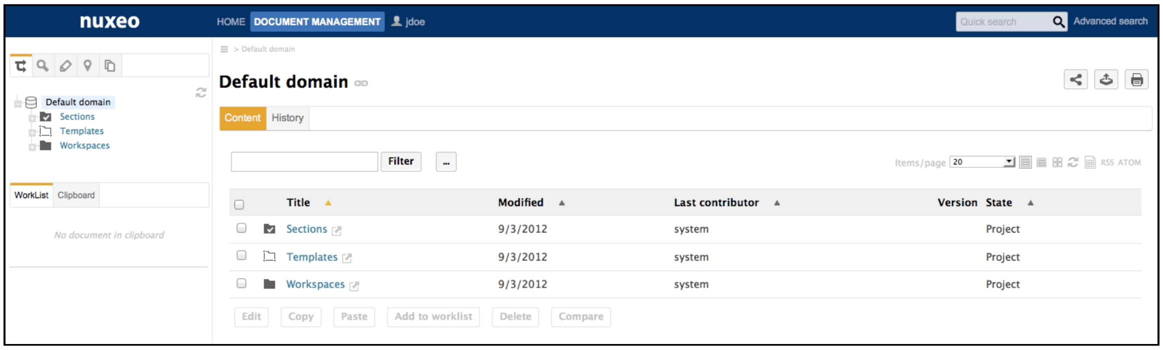
Tabs

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

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

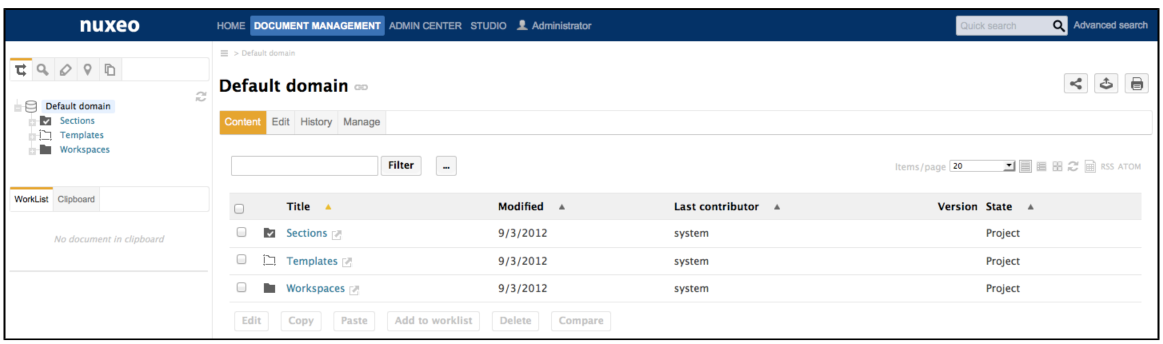
> Users need to have Read access to the root of at least one domain (typically Default domain) to be able to use this tab to browse the application. When users only have access to a workspace or a section, they can only access their dashboard and navigate to their documents from there.

On this page



Administrators have two extra tabs:

- The **Admin Center** tab, from which they can manage the application.
- The **Studio** tab, which provides access to Nuxeo Studio, the online customization and configuration environment.



Workspaces

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.

Templates

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.

Sections

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 users cannot change documents (edit or move them) in sections: documents published in sections are frozen versions of workspace documents. Publishing is controlled using a workflow, that requires publishing requests to be approved so documents can be seen in sections.

Domains

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

Access Rights

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

The available access rights are:

Right	Actions in workspaces	Actions in sections
Read	Consult content Comment documents Annotate documents Tag documents	Consult content Comment documents Annotate documents Tag documents + Can ask for publishing actions
Version	Manage the archived versions of a document (view, restore, delete) + Read actions	
Write	Create documents Edit documents Add / remove relations Start a workflow + Remove actions + Version actions + Read actions	Create sections Approve document publishing Unpublish documents + Read actions + Remove actions
Manage	Manage access rights Set alerts to other users Apply a preset look on documents Manage deleted documents + Write actions + Read actions	Manage access rights Set alerts to other users Apply a preset look on documents Manage deleted documents + Write actions + Read actions
Remove	Delete documents (this permission is included in **Write** right) The Remove permission is most intended to be denied, so as to restrict the actions available to users with "Write" permission.	Delete sub-sections (this permission is included in **Write** right) The "Remove" permission is intended to be denied, so as to restrict the actions available to users with "Write" permission.
Can ask for publishing		Submit documents for publishing (this permission in included in **Read** right) The "Can ask for publishing" permission is intended to be denied, so as to restrict the actions available to users with "Read" permission, typically to enable users to see the content of a section without being able to publish in the section.

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

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

Groups of Users

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

Default groups are:

- **members**: users in this group are the end-users users of the application.
- **power users**: users in this group are the functional administrators of the application. They have a restricted access to the Admin Center, the administration user interface of the Nuxeo Platform, from which they can manage users and groups, edit the vocabularies and define

the default dashboard of users.
- **administrators**: users in this group are the technical administrators of the application. They have access to all the Admin Center features and are in charge of managing the application. Beside the functional administration features, they can edit the application configuration, install packages on the application, consult the application's statistics, restart the server, etc.

Default groups
Users must be in one of the groups "members" or "administrators" to be able to access content. Power users must be in both the "power users" and "members" groups.

You can create as many groups as needed.

Browsing Content in Document Management

To help you find accurate documents, the Nuxeo Platform features several different ways to access documents, that can be completed by additional means provided by the Document Management module:

- The different navigation trees,
- The tag cloud,
- The dashboard,
- The simple, faceted or advanced search.

Dashboard

Every user has a personal dashboard that displays information he finds relevant and help him have a global view of the application's activity.
The dashboard is composed of a set of boxes that display either a list of documents matching a criteria (all the workspaces the user can access, the last documents he modified, the last documents that have been published...), or possibly a piece of information either from the Platform or from external websites.

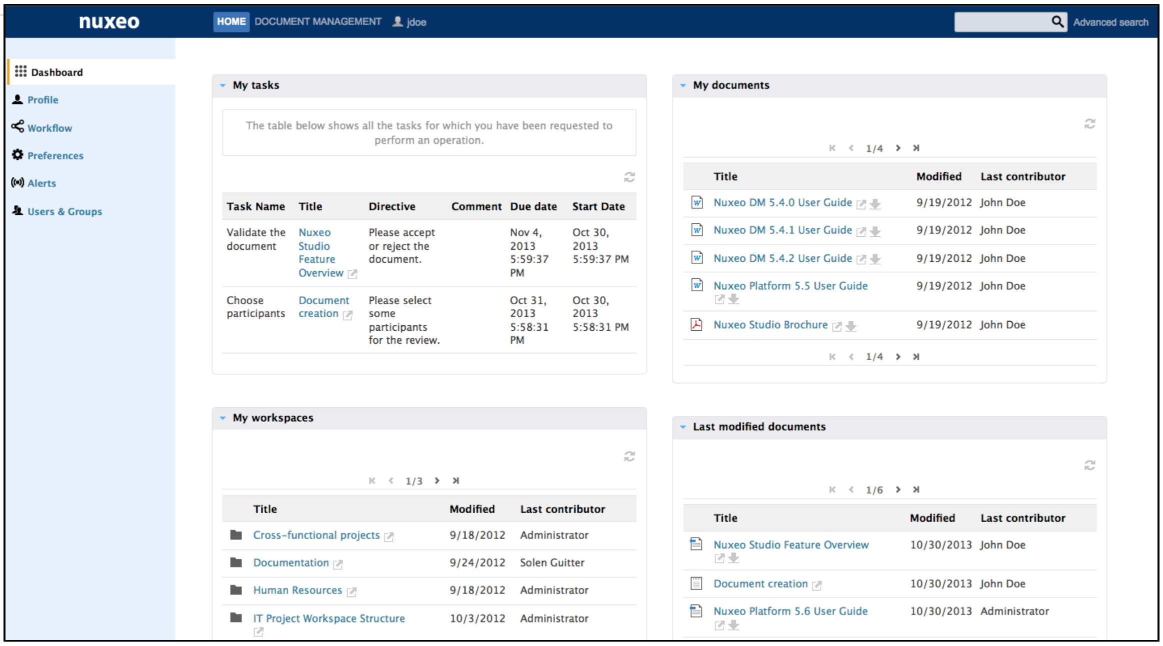
Depending on the modules installed on the Platform, you may have a different dashboard:

- The naked Platform offers a static dashboard,
- The Document Management Platform offers a dashboard that users can customize to display only the information they want.

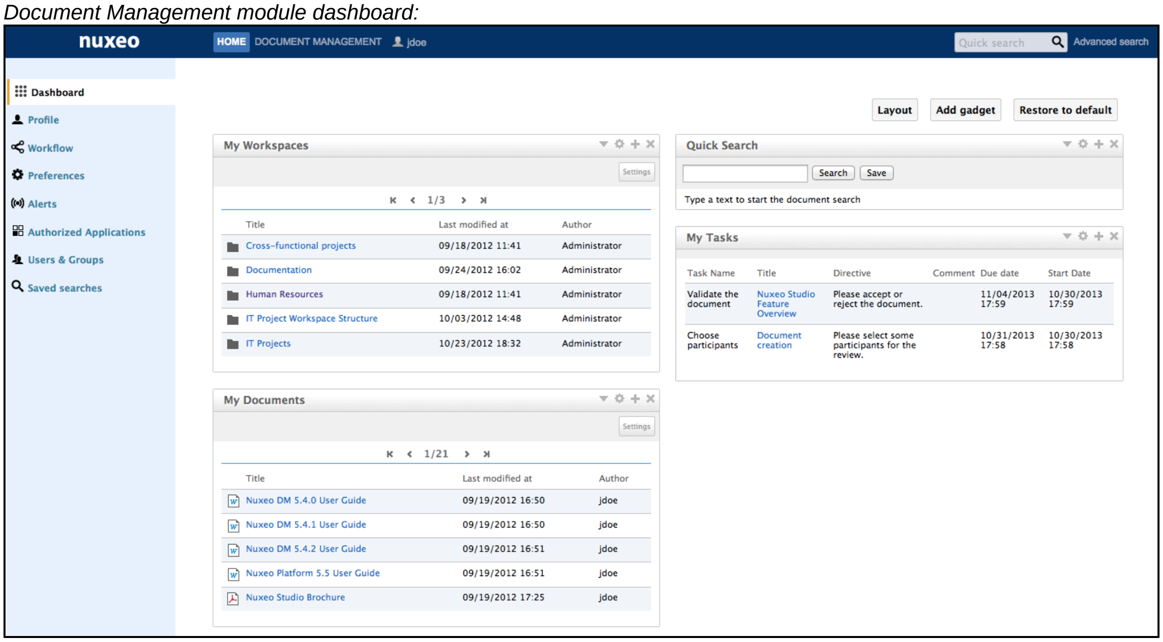
On this page

Dashboard Access

To access your dashboard, click on the **Home** main tab. Your dashboard is the default tab of your Home.
Naked Nuxeo Platform (CAP) dashboard:



Document Management module dashboard:



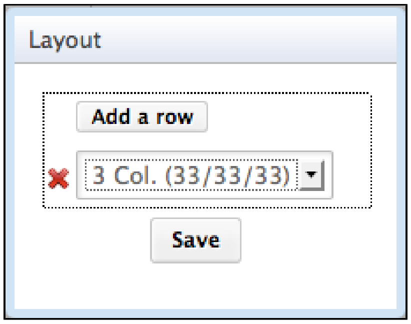
Customizing Your Dashboard

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

Changing the Dashboard Layout

To change your dashboard's layout:

1. From your dashboard, click on **Layout**.
   The layout window pops up.

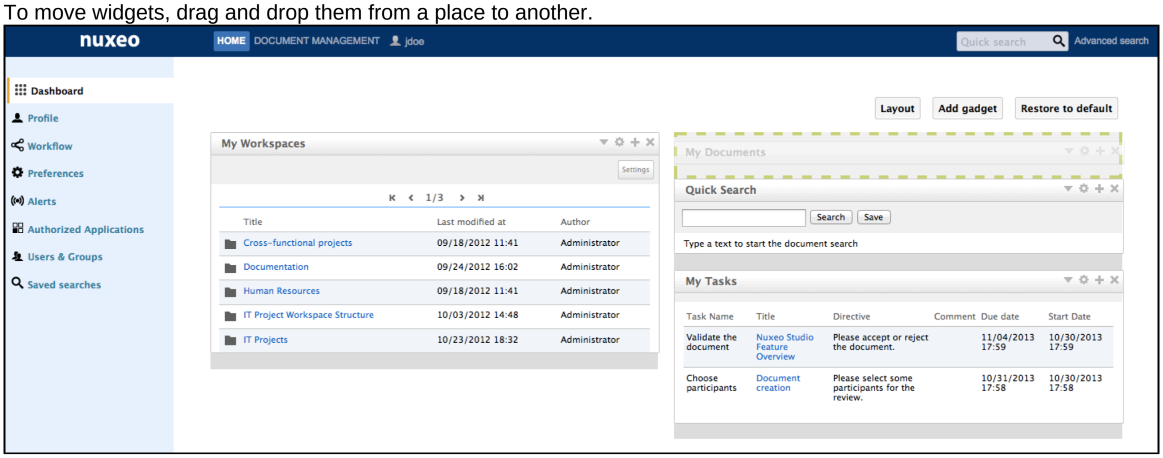


2. Determine the layout of your dashboard by adding or removing rows and selecting the columns proportions inside each row.
3. Click on **Close**.
   The chosen layout is immediately applied.
   Now you can reorganize your widgets in this layout.

Organizing Your Widgets

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

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



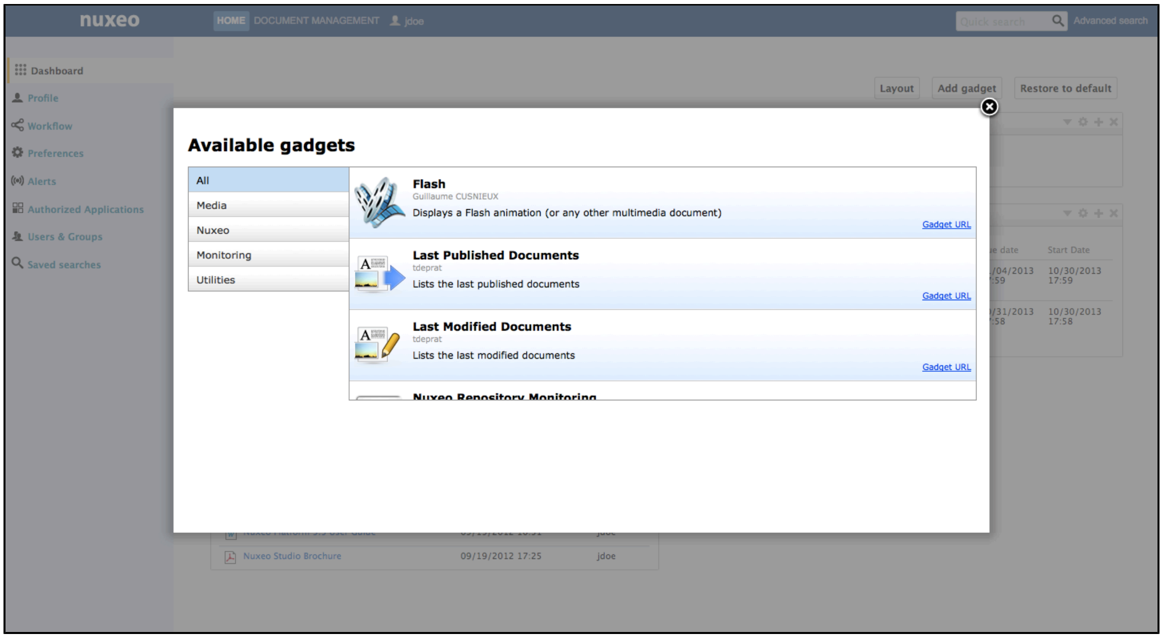
> **Drag and Drop extension**
> You don't need to install Nuxeo's Drag and Drop extension to move widgets.

Adding and Removing Widgets

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

To add a widget:

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



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

To remove a widget from your dashboard:

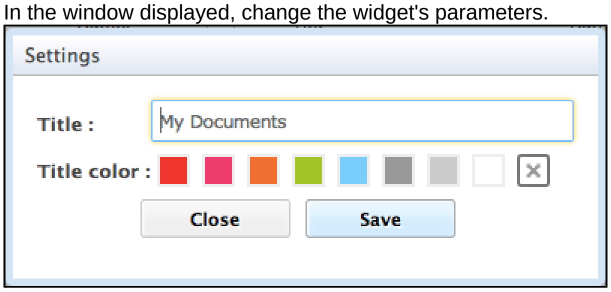
1. Click on the icon of the widget you want to delete from your dashboard.
2. On the window that pops up, click **OK** to delete the widget.
   The widget is removed from your dashboard.

Editing Widgets

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

To edit a widget:

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



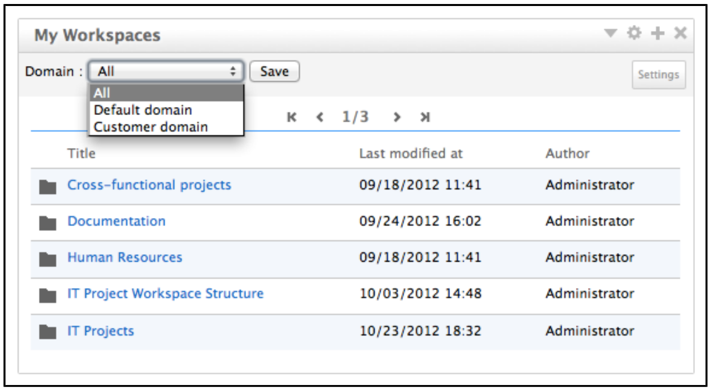
3. Click on **Save**.

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

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

To change the domain setting:

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



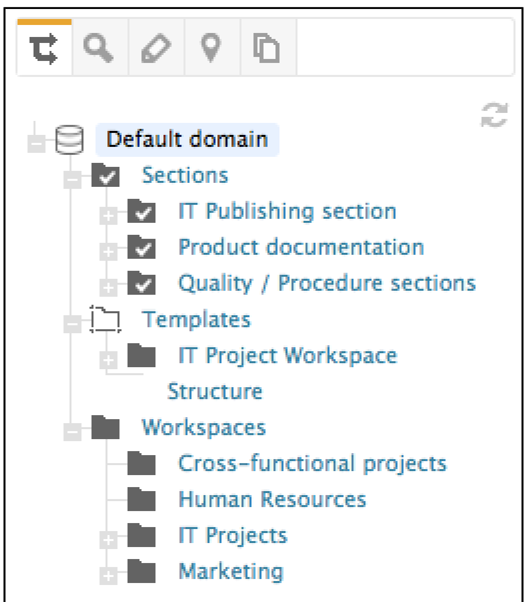
3. Click on the **Save** button.
   The content of your gadget is refreshed according to your selection.

Navigation Trees

There are different navigation trees to access content in the Nuxeo Platform, so that users 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.



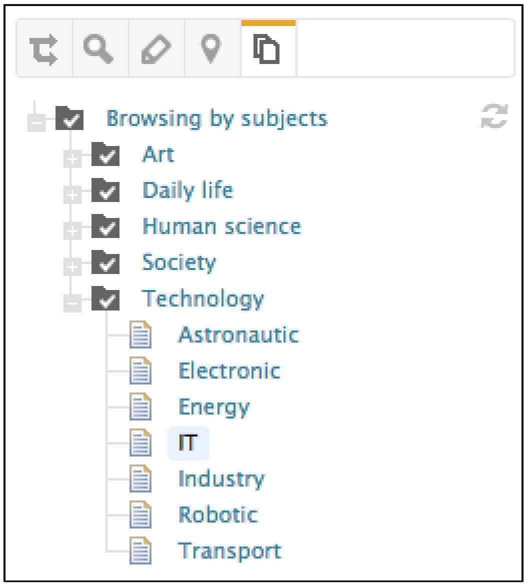
On this page

Virtual Navigation

> **Virtual navigation availability**
> Virtual navigation is available on the Document Management module.

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 information 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: geographical cover navigation tree and subject navigation tree. You can use them for instance to access all the documents about the IT subject.

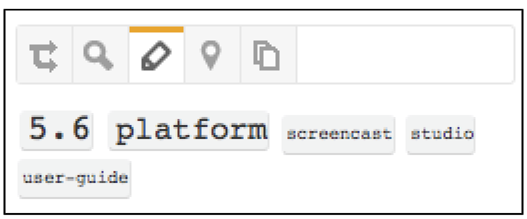


You can replace or edit existing virtual navigation trees with you organization's own vocabularies. Thus, you'll be able to adapt Nuxeo to your organization's structure and way of working.

See also pages Editing the document's content and metadata and managing vocabularies.

Tag Cloud

The Document Management module includes tagging of documents, which enables users to apply their 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.

Searching the Nuxeo Platform

The Nuxeo Platform provides several ways to search the content of the application, which can be used differently:

- suggestion search and simple search are usually used to find content quickly using only keywords. These types of search can generate a lot of noise if you search for very generic keywords;
- faceted search enables you to search on keywords and additional criteria, such as the location in the application or the author. Faceted search comes with the Document Management module;
- advanced search is the most complete search: it enables to search on all the metadata of the documents and also allows to customize the way search results are presented.

Documents are indexed using their title, description, content (note field, attached files), and metadata. But these different search forms don't have the same behaviors and may not give you the same results. They can provide text fields in which you can type keywords, date fields in which you can select a date to define a period, lists from which you can select values. Text fields can be full-text search fields or exact match fields.

General Principles

Stemming

Full-text search uses stemming. Stemming is a process that reduces words to their uninflected root, which is not necessarily a word. This means that full-text search will return documents containing words that have the same stem as the word you entered into the search field. For instance, if you type "arguing" in a full-text search field, search results will return documents with "argue", "argued", "argues". In that case, the stem is "argu". But "argument" and "arguments" reduce to the stem "argument".

On this page:

Children pages:

Operators and Wildcards

The application's search engine uses boolean operators and wildcards, to enable you to define your search on text fields. The Boolean operators and wildcards can be used on full-text search and exact match fields:

- Full-text search fields:
  - AND: all the words separated by the operator must be in the found documents. This is the default operator of all full-text search fields, so you actually just need your keywords and the AND operator is implied.
    Example: you are looking for documents about Nuxeo and marketing. Type *Nuxeo marketing*.
  - -: The keyword after this symbol must not be in the found documents.
    Example: you are looking for all the documents referring to the Nuxeo but not about meetings. Type *Nuxeo -meeting*.

    > You need to keep the - stuck to the word to be excluded. If you put a space between the - and the word after it, the - is ignored.

  - OR: any of the word before "OR" or the word after it must be in the found documents.
    Example: you are looking for documents that talk either about marketing or about sales. Type *marketing OR sales*.

    > The operator is capitalized in the example above to make it easier to see how the search is built, but it doesn't require to be capitalized. The same principle is applied in the rest of this page.

  - double quotes (""): the exact expression between quotes must be in the found documents.
    Example: you are looking for documents that have the sentence "copyright Nuxeo". Type *"copyright Nuxeo"*.

    > The behavior of the search on a sentence between quotes depends on the database that you are using. But in general, stemming is still applied on a sentence search.

- Exact match fields:
  - %: this symbol replaces zero or more characters. It works like the more commonly used * (asterisk).
    Example: you are looking for documents having wiki- sites as a source (such as wikipedia, wikimapia, wiktionary, etc). Type *wik %* in the Source field of the advanced search form.

Ignored Words and Characters

To avoid noise in the search results, some words are ignored. Typically, words like "the" or "no" are not taken into account. This is configured at the database level. For PostgreSQL, you may want to take a look at the Text Search Functions and Operators page for more details on how search works on the database.

Some characters, that can often be used as wildward, are configured to be ignored if they are used in the search forms : `!#$%&'()*+,./\\\\:-@{|}`^~`.
You can configure escaped characters in the nuxeo.conf file using the `org.nuxeo.query.builder.ignored.chars` parameter.

Case-Sensitivity

Full-text search is case insensitive. You can search for "news", "News" or "NEWS", you will get the same results: all documents with the word news, whether it's capitalized or not.

On the other hand, exact match text fields are case-sensitive. You must type the word with exactly the same letter case as it is set on the documents to get a result: typing "copyright" in the Rights field of the advanced search form won't return documents with "Copyright" in their Rights field.

Exporting Search Results

Whatever the type of search you use, you can export the results of your search as a XLS document. This enables you to save the search results to consult them later.

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

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

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.

Typing keywords in the search field and clicking on the **Search** button or pressing the "Enter" key triggers a full-text search:

- Based on stemming,
- With AND operator (all words must be in the document),
- Searching on the title, the description and the content (text of a note, content of the main attachment of a file).

> If you're using the Document Management module, typing in the quick search field will trigger the suggestion search. See below for more information on the suggestion search specific behavior.

In this section

Simple Search on the Naked Platform

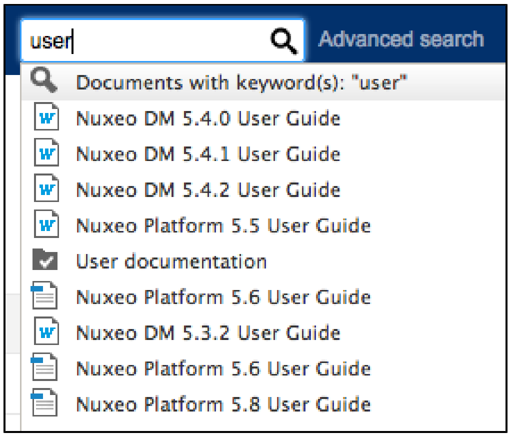
1. Type your keywords in the simple search field.
2. Press the Enter key to display all matching documents.
   Search results are displayed in a table.
3. Click on the document's name to open it.

Simple Search on the Document Management Module

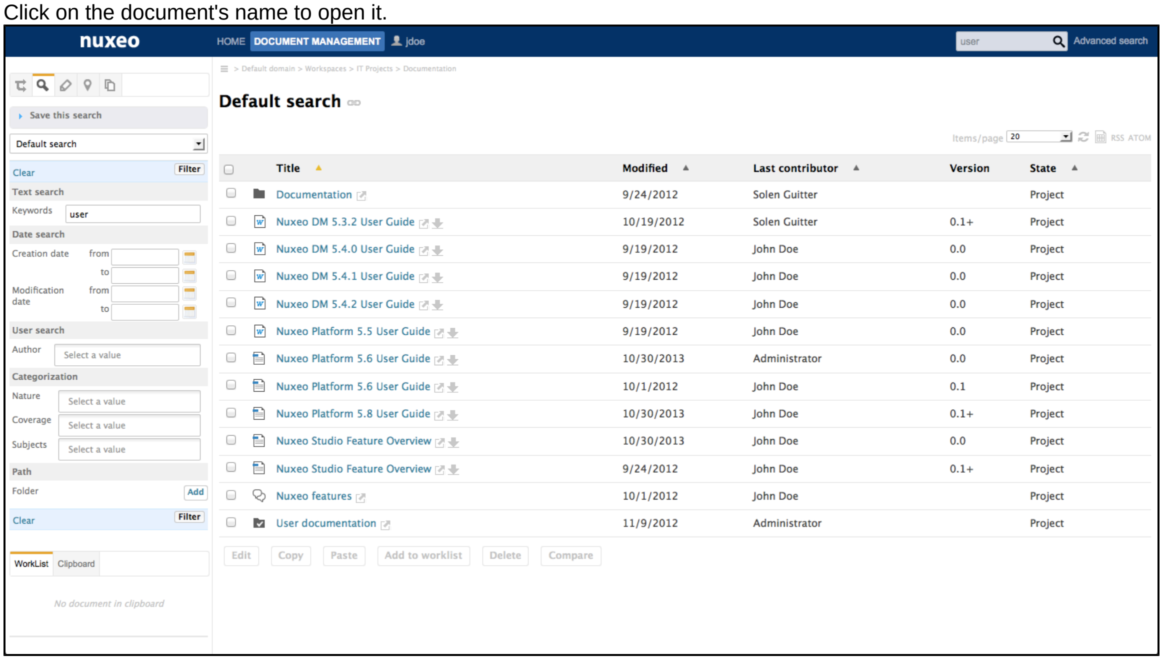
On the Document Management module, the simple search is actually a faceted search on full text. The faceted search tab is automatically selected to enable you to refine your search, and you can save your search. But before you press the Enter key, a suggestion search is automatically done, displaying some results as you type keywords.

To search a document using simple search:

1. Type your keywords in the quick search field.
   Five matching documents are suggested as you type. See below for details on suggestion search.



2. If the searched document is not suggested, press the Enter key to display all matching documents. Search results are displayed in a table.
3. Click on the document's name to open it.



Suggestion Search

> **Requirement**
> Suggestion search comes with the Document Management module.

When you start typing words in the simple search field, in the top right corner of the page, you are displayed some results as you type. This is the suggestion search. You can type words or dates in this field. Results include three types of items:

- Documents (10),
- Users (5),
- Suggested faceted search (5).

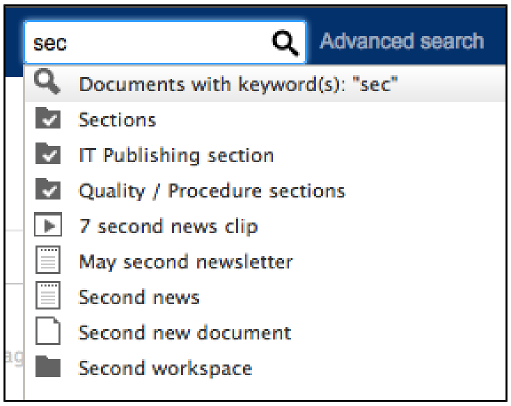
Search on Keywords

Search on documents is done on the document's title only. The query mixes prefix-based search and stemming search and uses the AND operator:

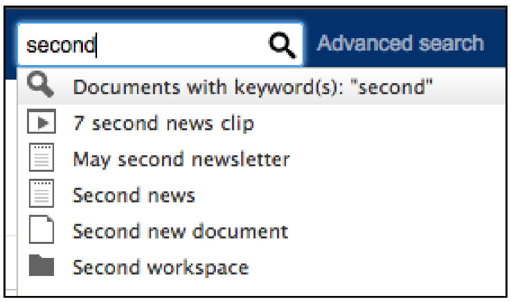
1. The word that you are typing is searched for using a mix of stemming and prefix-based search: the system analyzes the typed string, determines the stem and adds a * wildcard. For instance "sec" will return documents having this string in their stemmed title, like "second", "section").
2. As soon as you type another word, stemming only is used on the completed word(s) and stemming and prefix mixed search is done the last word of the list, the one you are typing.

For instance:

1. In the quick search field, type "second".
   As soon as you type "sec", the system will suggest documents with titles like "sections", "second workspace", "second news", "7 seconds news clip", i.e. documents with the string "sec" somewhere in their stemmed title.

   As you type, the list of suggested document is narrowed to match the typed characters. You end up with documents like "second workspace", "second news", "7 seconds news clip", "secondary newsletter".

   Click to see the executed NXQL query...

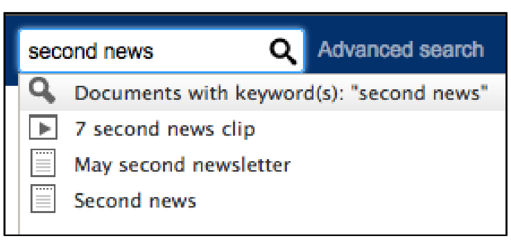
   The query that is done is:

   ```
   SELECT * FROM Document WHERE ecm:fulltext_title = "second*"
   ```

2. Add a second word in the search field, for instance "news".

   As you type, the system will suggest documents with title holding words whose stem is "second" and words starting with "news". From the list above, only the documents above are left: "second news", "7 seconds news clip".

   "second workspace" doesn't match any more because it doesn't hold a word with "news", and "secondary newsletter" is not suggested anymore because the stem for "secondary" is "secondar" and not "second".

   Click to see the executed NXQL query...

   The query that is done is:

   ```
   SELECT * FROM Document WHERE ecm:fulltext_title = "second news*"
   ```

You can use the operators - and OR in the suggestion search.

Search on Dates

On the same principle, you can type a date in the simple search field. The system searches for documents that hold the numbers in their title.

It also suggests several faceted searches:

- Documents with the date as a keyword,
- Documents created before the date,
- Documents created after the date,
- Documents modified before the date,
- Document modified after the date.

To be recognized as such in the search field, dates must be formatted with a 4-digits year. Month and days are expected to be ordered with the month before the day (MM/DD), following the ISO 8601 standard. So if you type "04/08/2013", the suggestion will display search based on the April 8th 2013. The date being a 4-digits number, it can actually be either at the beginning or the end of the date (2013/04/08 or 04/08/2013). To search for a date, you can use space, dash, underscore, colon or slash as a separator between the year, month and day.

Search on Users and Groups

You can also use the simple search box to search users and groups.If you type a user's first name, last name or username, or a group's ID or label, the system searches for documents that have the typed name in their title, but also for users and groups.

When the system finds a user, it suggests a faceted search with the user as the creator of the document.

Faceted Search

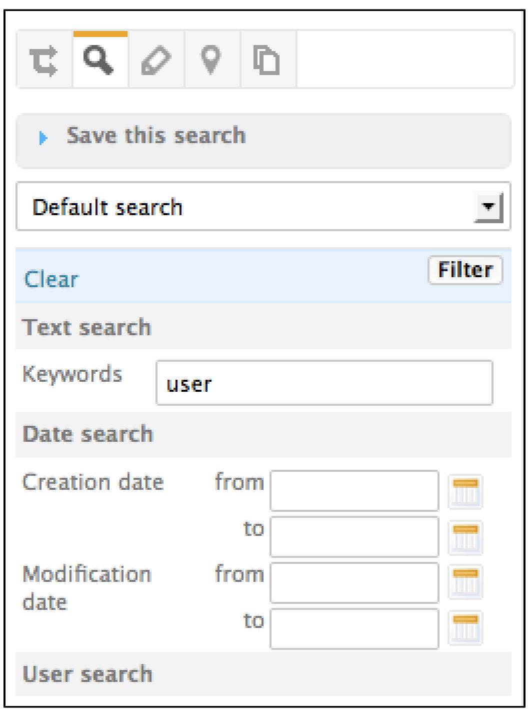
Faceted search is an easy way to browse the content of your application, by creating filters on the content of the application. You can filter content using:

- Keywords (full text search based on stemming, see the General principles section for more details on full text search),
- Dates (creation and last modification dates),
- Author,
- Documents categorization (nature, coverage, subjects of documents),
- Location of the documents in the folders.

Faceted search is available on the Document Management module of the Platform, in the tab of the left hand side of the page.

Faceted search also enables you to save searches to easily perform recurrent searches and find documents.

In this section



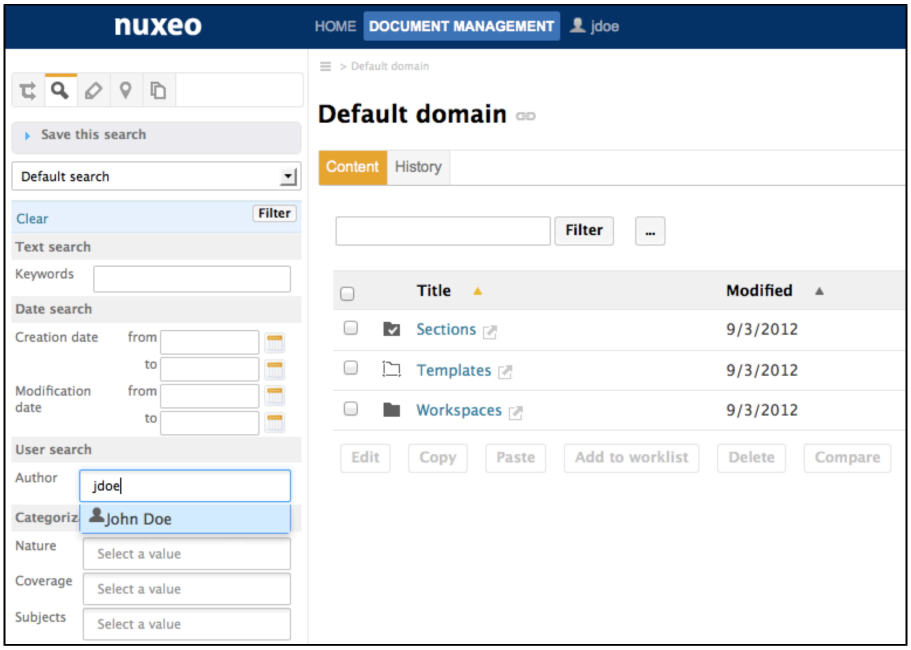
Searching Documents Using Faceted Search

The faceted search tab offers several criteria to filter the content of the application.

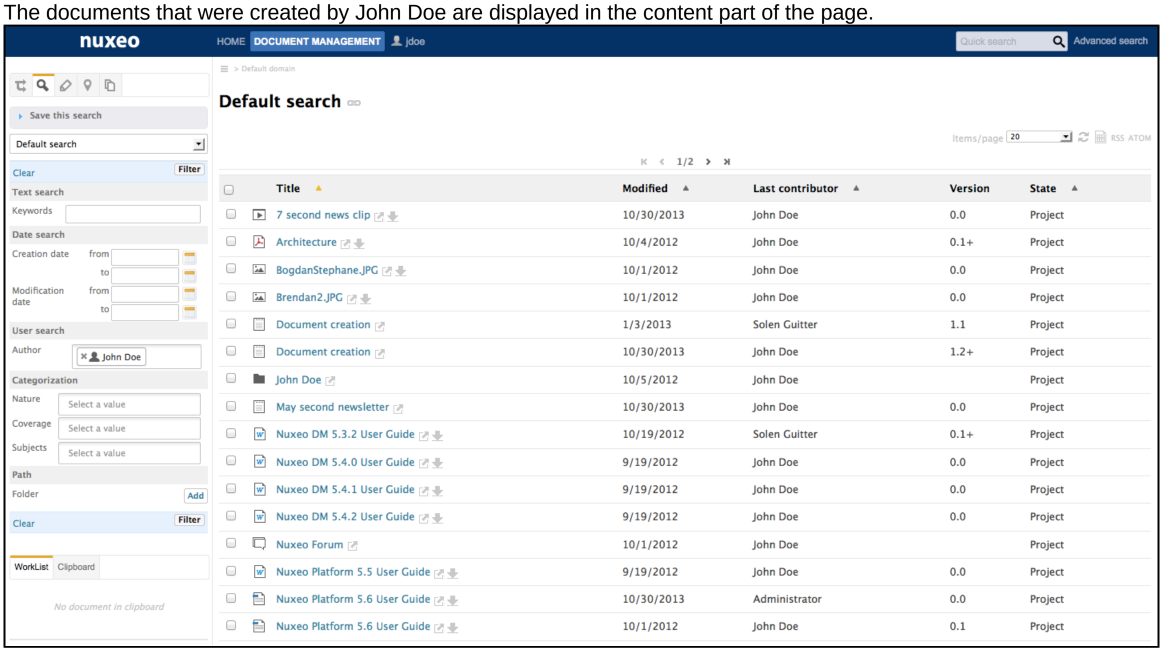
Field	Description
Keywords	The keywords field behaves like the simple search field. It makes a full-text search. You can use full-text operators in this field to refine your search.
Dates	The creation date and modification date criteria have the same behavior. The system will just respectively query the "Created at" and "Last modified at" fields. These fields enable you to select a time period (from Apr. 19th 2013 to Apr. 23rd 2013 for instance) or just a limit date (from Apr. 19th 2013 or until Apr. 19th 2013 for instance). **Time** Date-based search includes the time of the selected day(s). By default, 12:00 pm is selected. This may impact search results, since documents created before or after that time will not be included in the search results. You need to manually change the time to cover a full day.
Author	You can select one or several users of the application using the user suggestion field: type at least three characters to make the user search start. If you select several users, the system will search for documents created by any of the selected users.
Nature	You can search for documents that have a specific value in the Nature metadata. You can select one or several values in this search field.
Coverage	You can search documents on their coverage value. You can search on several coverage values. You can also select a 1st level value to search the document that cover Europe, for instance.
Subjects	The Subjects field behaves like the Coverage field.
Path	You can limit the search to a specific workspaces / section / folder by selecting it in the Folder popup window. **Multi-domain Nuxeo instance** If you have several domains (for instance if you use the Social Collaboration or Digital Asset Management modules), note that the Folder popup window will display the tree structure of the domain you are currently browsing. To select folders in several domains, go on the application's root (using the icon) before filling in the faceted search form.

To browse the content of the application using faceted search:

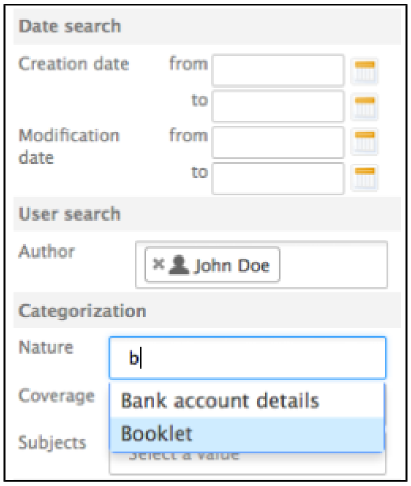
1. In the Faceted Search tab, fill in the form with the properties of the documents you want to browse.
   For instance, we only want the documents created by user John Doe.



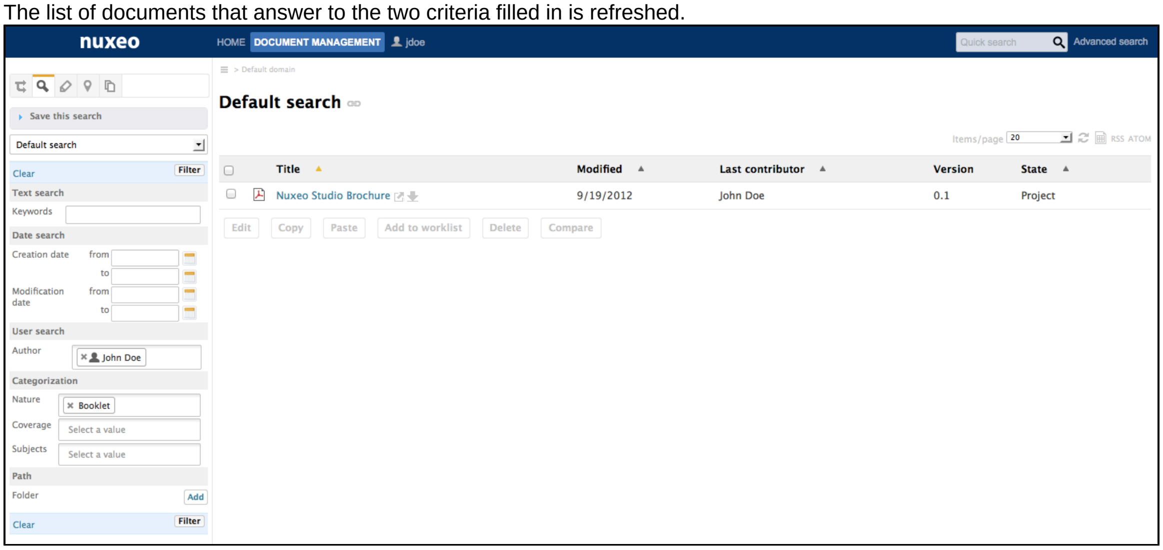
2. Click on the **Go** button.
The documents that were created by John Doe are displayed in the content part of the page.



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



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



Saving Your Faceted Searches

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

> **Saving searches limitations**
> Only faceted searches can be saved.

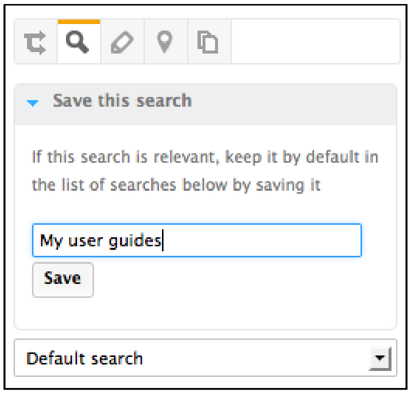
Saving a Search

When you save a search, you save the criteria of the search. This means that the results displayed when you reuse the search may be different from the results at the time you saved the search, as the content of the application may (and probably will) have changed.

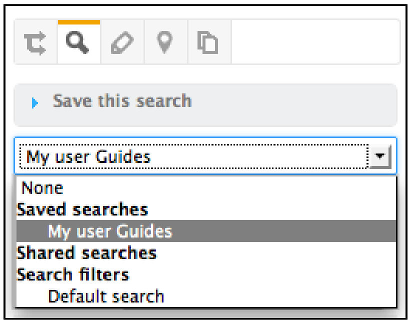
You can save as many searches you need. Saved searches are available in the "Saved searches" drop down list. To load a search, just click on it in the list. It is automatically executed.

To save a search:

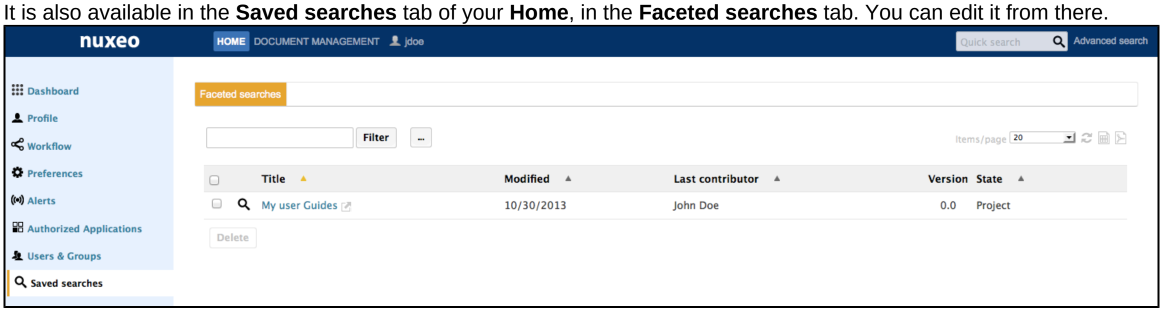
1. Start a search using the faceted search form.
2. When you are satisfied with the filter you have done, click on the **Save this search** title on top of the filters.
3. Give the search a title.



4. Click on the **Save** button.
   The search is saved. It is now available in the drop down list so you can run it in one click.



   It is also available in the **Saved searches** tab of your **Home**, in the **Faceted searches** tab. You can edit it from there.



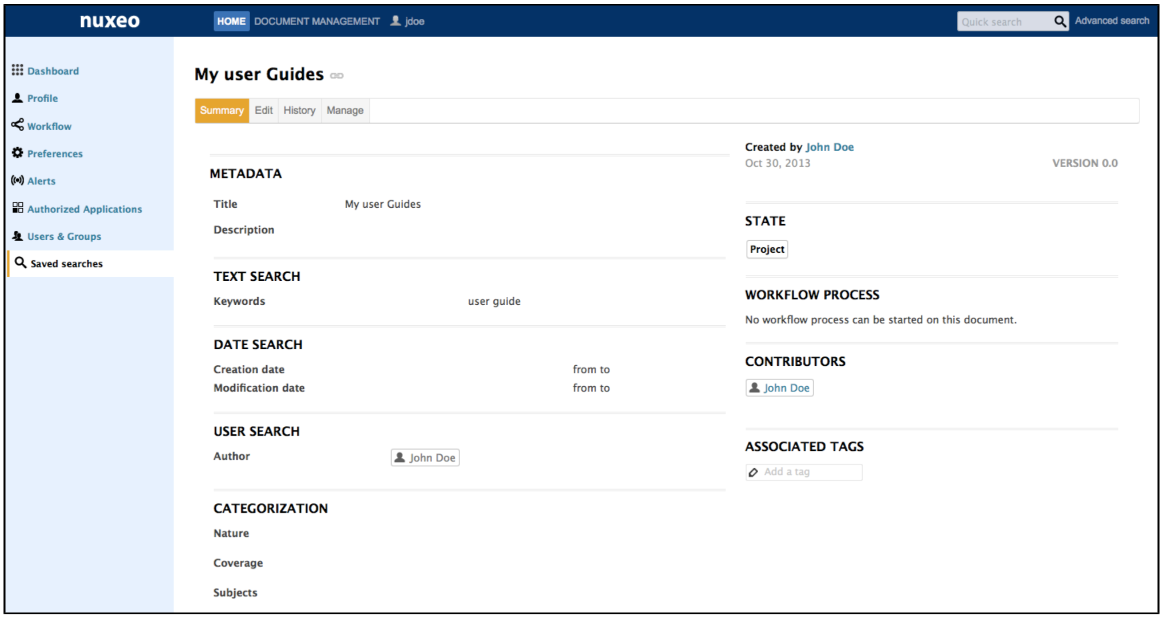
Sharing a Saved Search

Saved searches are stored in the **Saved searches** tab of your **Home**. This enables you see them as documents and to edit and share them.

Depending on the modules you use and possible customizations, there can be several tabs in the Saved searches. For instance, if you use the Document Management and Digital Asset Management modules, you will have two tabs: Faceted searches, for DM saved faceted searches, and DAM searches, for DAM saved searches.

To share a search:

1. Go on the relevant **Saved searches** tab in your **Home**.
2. Click on the search you want to share.
3. Click on the search **Manage** tab and give Read access right to the users you want to be able to use the search.



Related pages in this documentation

- Smart Search
- Quick Search
- Advanced Search

Related pages in other documentations

- Faceted Search

Advanced Search

Advanced search enables you to search a document using all the documents metadata. You can for instance select metadata of the searched document or the date of specific events such as publication, creation. You can also customize what information is displayed in the search results.

Searching Documents Using Advanced Search

The advanced search form offers several search criteria, that you can associate to define your search and find documents.

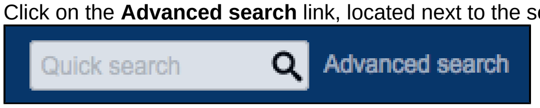
In this section

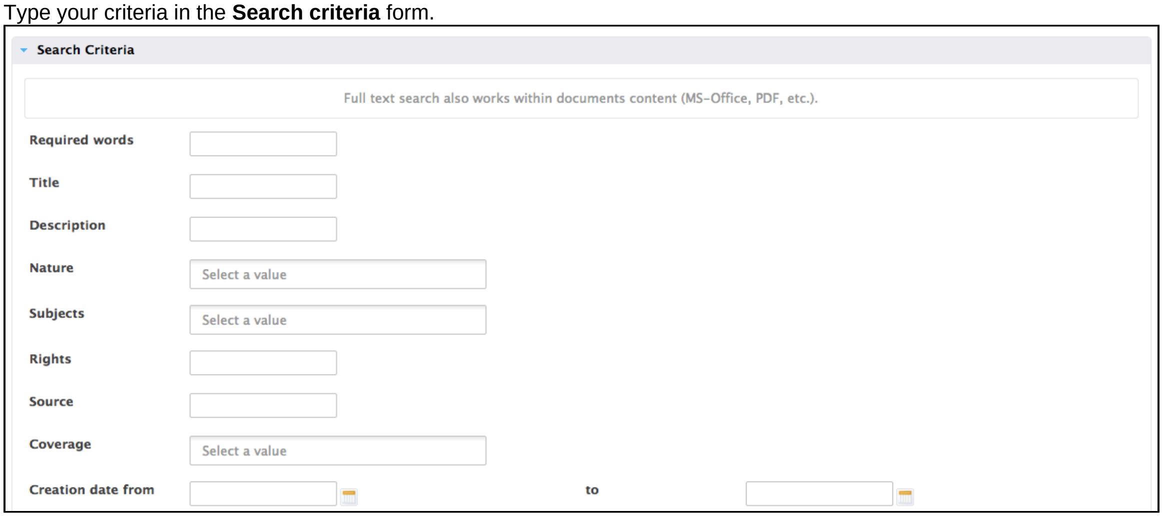
Available search criteria are:

Field	Description
Required words	This field is equivalent to the simple search field: keywords are searched for in the title, description and content, using stemming. You can use operators to refine your search.
Title	This field is a full-text search field. The keywords typed in this field are searched for in the document title only, using stemming. You can use operators to refine you search.
Description	This full-text search field enables you to search for keywords in the description of documents only. You can use operators to make your search more precise.

Nature	You can search for documents that have a specific value in the Nature metadata. You can select one or several values in this search field. To select several nature values, click on each of them with the CTRL key pressed. Click again on a value to unselect it.
Subjects	You can search documents on their Subject value. You can search on several coverage values, but, unlike the faceted search, it is not possible to search on the first level of subject only (Art for instance).
Rights	This is an exact match search field. This means that you must type exactly the value that has been filled in on the document to find it, including the letter case. You can use the % character to replace one or several letters.
Source	The Source field has the same behavior as the Rights field.
Coverage	Just like you can search document on their subject, you can also make use of their coverage value. You can search on several coverage values, but you must select both the continent and the country. It is not possible to search only on the continent like on the faceted search form.
Creation date	All the dates fields have the same behavior. The system will respectively query the "Created at", "Last modified at", publication date and "Expires at" fields. These fields enable you to select a time period (from Apr. 19th 2013 to Apr. 23rd 2013 for instance) or just a limit date (from Apr. 19th 2013 or until Apr. 19th 2013 for instance). Date-based search includes the time of the selected day(s). By default, 12:00 am is selected for "from" field and 11:59pm for "to" fields. You can manually change the time if you want only documents created from a certain time, for instance.
Modification date	
Issue date	
Validation date	
Expiration date	
Format	This exact match field behaves like the Rights field.
Path	You can limit the search to a specific workspaces / section / folder by selecting it in the Folder popup window.
Language	This is an exact search field. It behaves like the Rights field.
Search also for deleted documents?	Select "Yes" if you want deleted documents to be included in search results.

To search documents using detailed criteria:

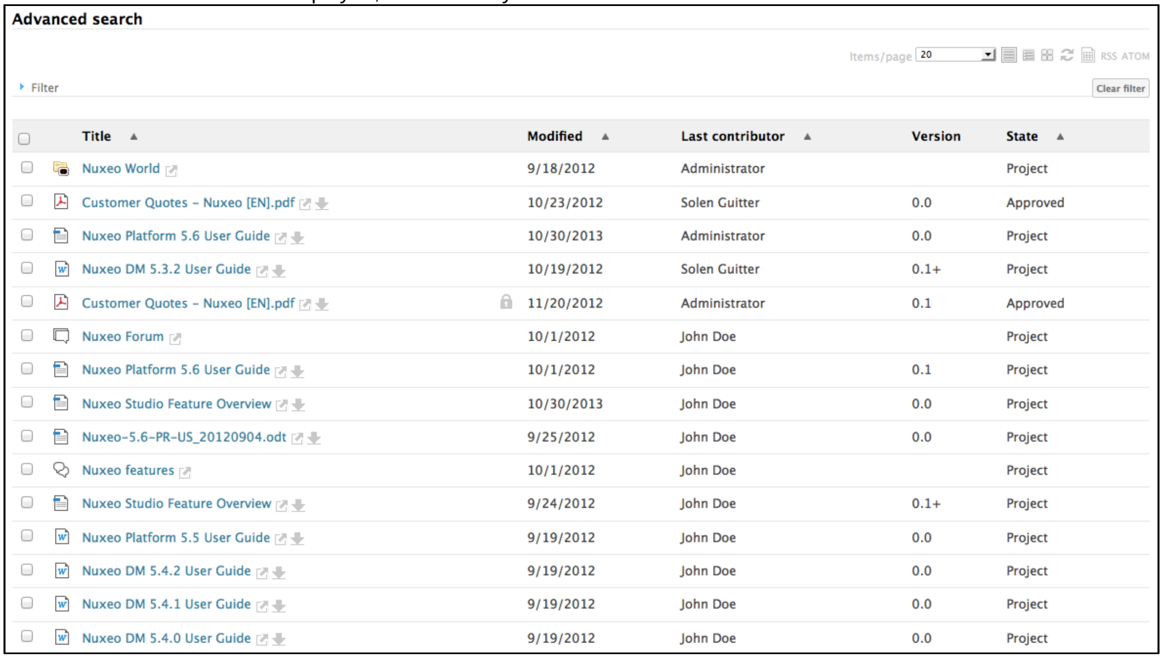
1. Click on the **Advanced search** link, located next to the search box.


2. Type your criteria in the **Search criteria** form.


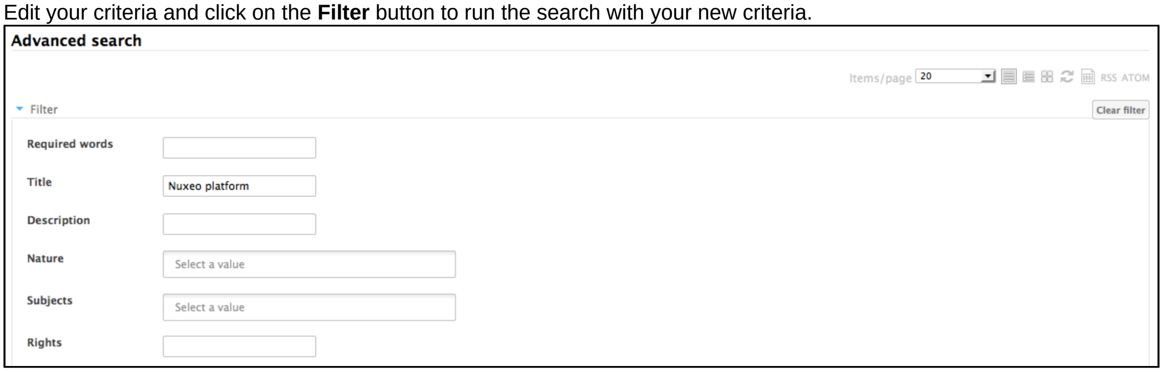
3. Possibly, change the search results columns.
4. Click on the **Search** button.
   Search results are displayed in a table.
5. Click on the document's name to open it.

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

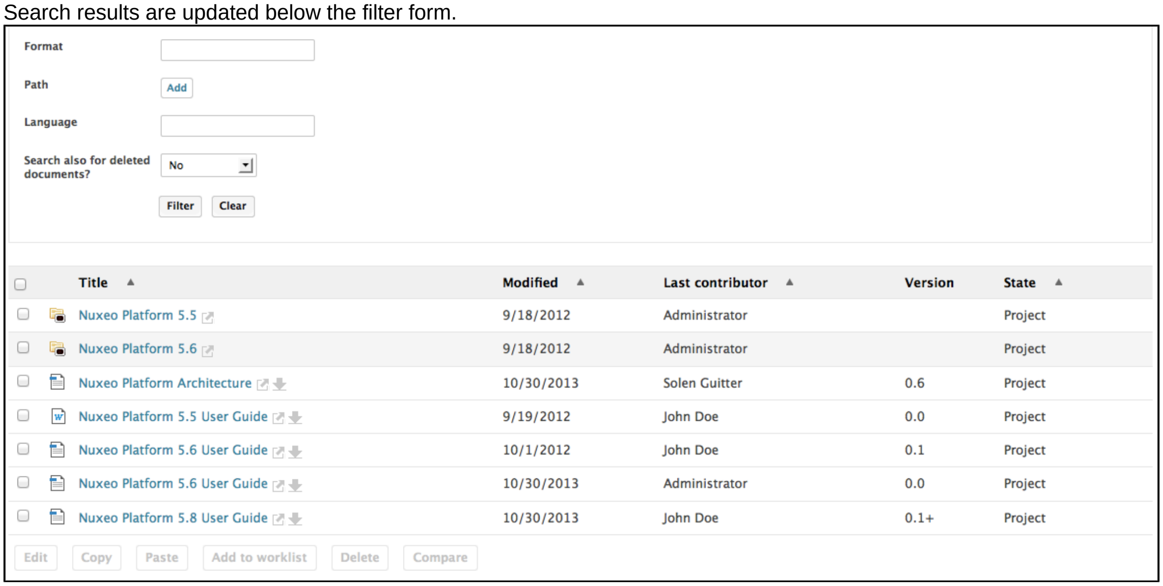
1. Click on the **Filter** link displayed on top of search results to unfold it.
   The advanced search form is displayed, filled in with your criteria.



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



   Search results are updated below the filter form.



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

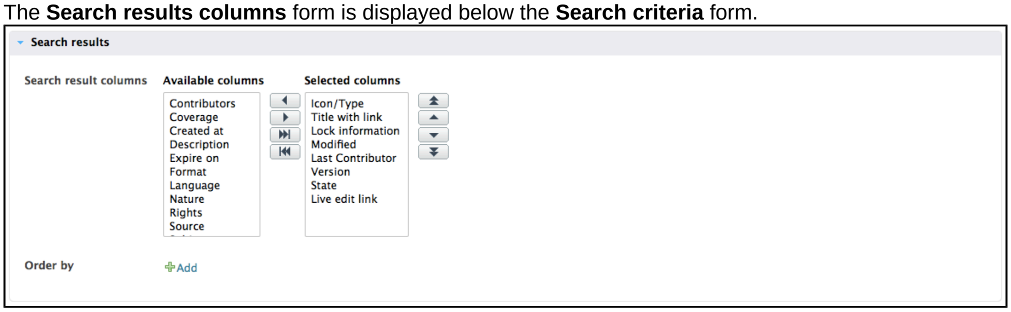
Customizing Search Results

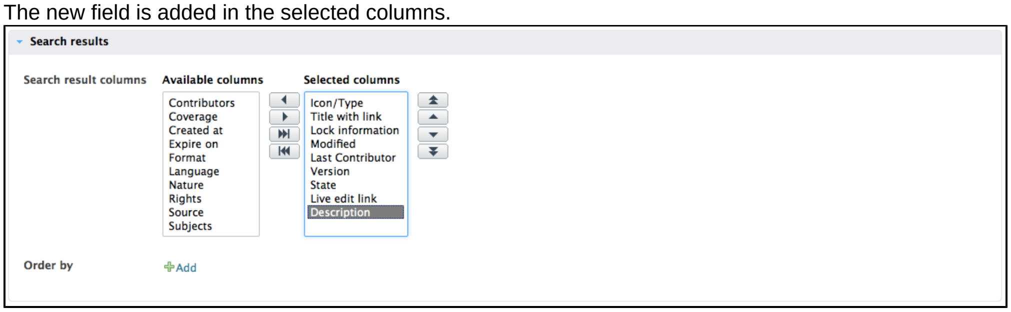
You can choose which information is displayed on the results page. The default information are the document's title, its creation date and its modification date. You can add or remove fields from search results display.

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

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

Removing Search Result Columns

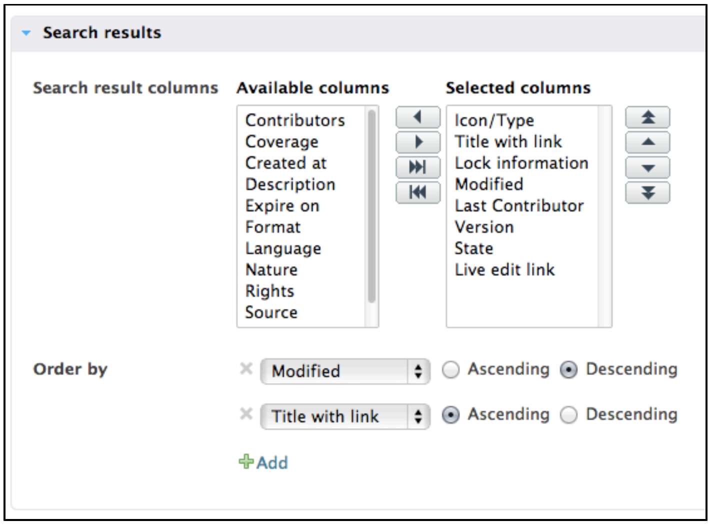
To remove a column, select the column to be removed and click on the  arrow.

Changing Search Result Sorting

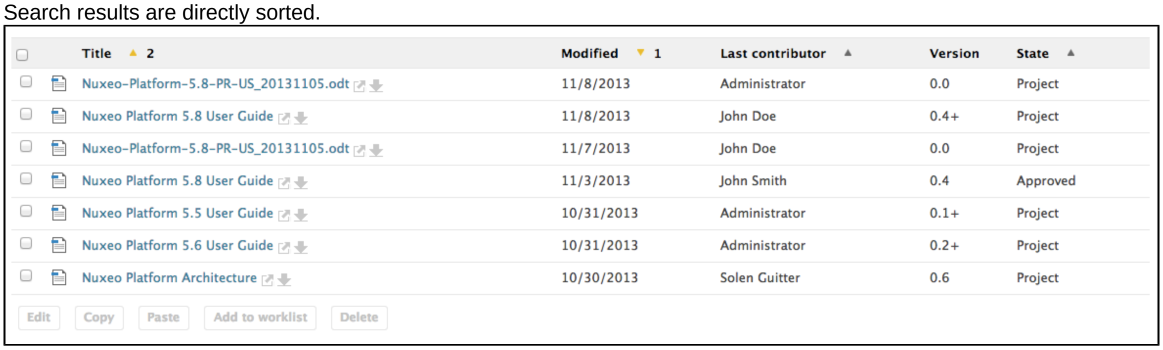
You can sort the results on any of the search results column. You can also change the order direction.

To change the sort criteria of search results:

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



Search results are directly sorted.



Title 2	Modified 1	Last contributor	Version	State
Nuxeo-Platform-5.8-PR-US_20131105.odt	11/8/2013	Administrator	0.0	Project
Nuxeo Platform 5.8 User Guide	11/8/2013	John Doe	0.4+	Project
Nuxeo-Platform-5.8-PR-US_20131105.odt	11/7/2013	John Doe	0.0	Project
Nuxeo Platform 5.8 User Guide	11/3/2013	John Smith	0.4	Approved
Nuxeo Platform 5.5 User Guide	10/31/2013	Administrator	0.1+	Project
Nuxeo Platform 5.6 User Guide	10/31/2013	Administrator	0.2+	Project
Nuxeo Platform Architecture	10/30/2013	Solen Guitter	0.6	Project

Edit Copy Paste Add to worklist Delete

Browsing Tips

The Nuxeo Platform provides several means to browse its content: tags, the breadcrumbs, the different trees... Here are some tips on how to leverage all these means.

Going Back to a Previous Page

Due to technical reasons, it is recommended to NOT use the browser's Back and Next buttons to navigate in the Platform. There are several ways to go back to a previous page.

To go up one level in the platform structure, the easiest way is to click on the icon in the breadcrumbs.

In this section

Users can also click on the workspace's title in the breadcrumbs directly or in the navigation tree. They can go up several levels in the document's path in a single click that way.

Working with Several Documents at the Same Time

Users may want to have several Nuxeo documents open in different tabs in order to easily consult them at the same time or to work on several documents at the same time. Browsers provide a way to open documents in new tabs, but then some contextual information will be shared by all these tabs (all tabs use the same conversation). This can result in inconsistencies when modification on the documents are saved or when the user wants to navigate to another document. The Platform provides a safe way to open documents in new tabs, which is preferable to the browser's "Open in new tab".

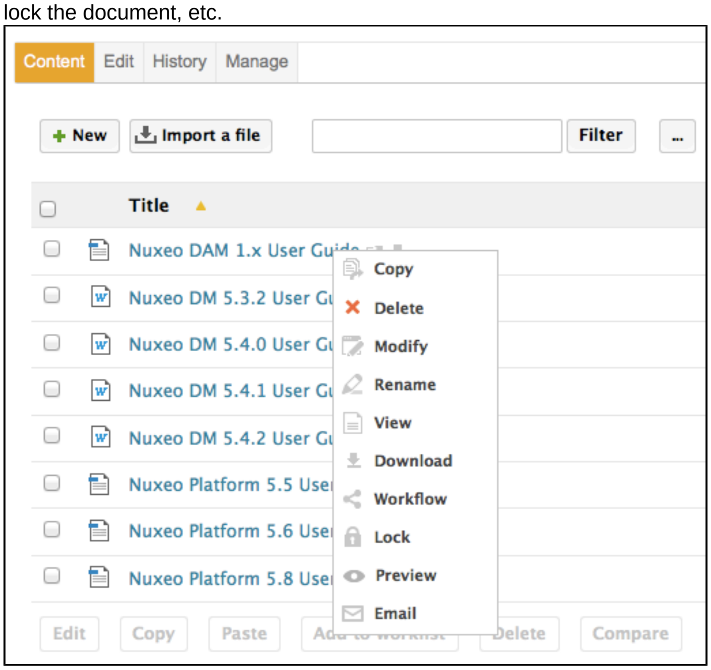
To open documents in new tabs in order to have several Nuxeo tabs, click on the icon displayed next to the document's title. The document is opened in a new tab and in a context that is independent from the original tab.

Quick Access to Document's Features

Right-Click Menu

The Nuxeo Platform provides a contextual menu that enables users to access to the document's tabs in a single click instead of clicking on the document and then on the tab they want (the **Edit** tab for instance).

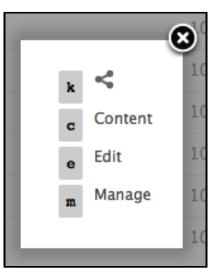
Right-clicking on the document displays this contextual menu and enables users to easily rename the document, access to the Workflow tab, lock the document, etc.



Access Keys

Some actions or features are accessible using access keys: For instance ctrl-Shift-e displays the Edit tab of the document.

Press Shift-h to see the different access keys you can combine with ctrl-Shift keys to get a quick access to features.



Using Nuxeo Gadgets from Other Applications

When the Document Management module is installed on the Nuxeo Platform, it is possible to use Nuxeo gadgets in other applications, such as iGoogle.

This takes 2 steps, to make this work:

1. your administrator must authorize the external application to access the Nuxeo Platform,
2. you can add the Nuxeo gadget on the external application.

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

Authorizing an External Application to Access the Nuxeo Platform

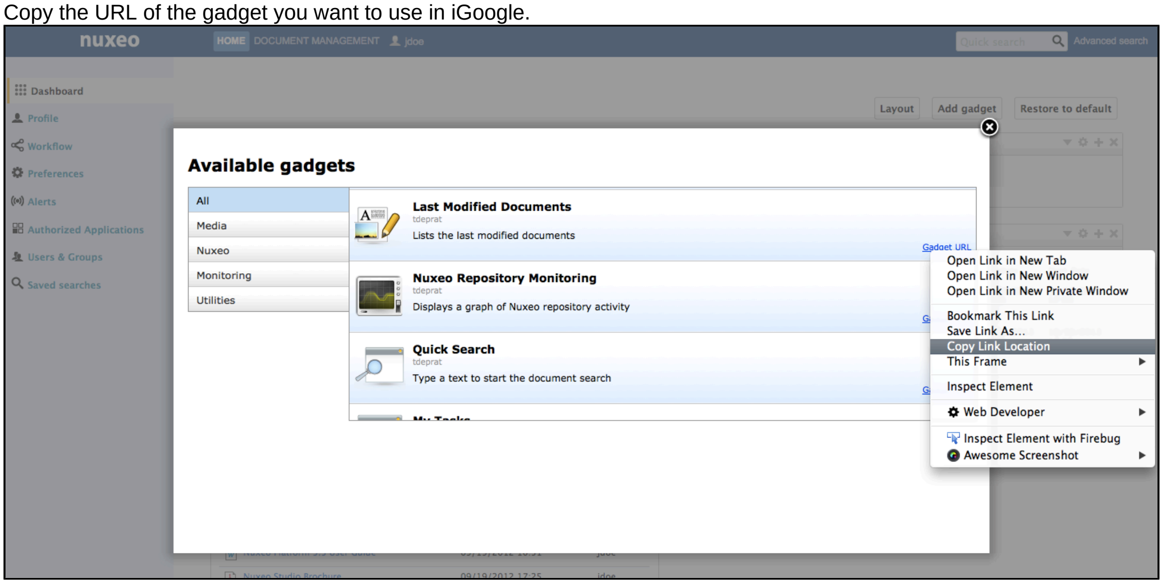
Before users can use the Nuxeo Platform gadgets in another application, the administrator must authorize this application to access Nuxeo content.

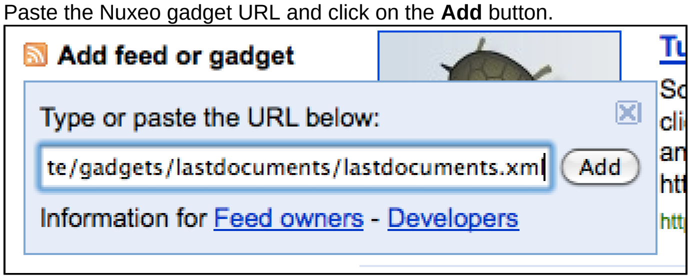
To authorize external application to access Nuxeo DM content:

1. In the Admin Center tab, click on the **OpenSocial / OAuth** tab.
2. Click on the **Consumer** tab.
3. Click on the **Add** link.
   The form to add a new consumer is displayed.
4. Fill in the form with the parameters below.
5. Click on the **Create** button.

Adding the Nuxeo Gadget in the External Application

Add a Nuxeo gadget in an external application:

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

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

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

Related pages in this documentation

- Managing Dashboards
- User Home

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 and picture books to communicate ans share information with the other users.

Working with Workspaces

There are two types of workspaces:

- *shared workspaces* are workspaces meant for collaborative work, that is to say that the workspace's content is meant to be shared and modified by several users. Collaborative workspaces are workspaces created in the root space called **Workspaces** and shared between users. Once documents are ready for distribution, they must be published in a section.
- *personal workspaces* can only be accessed by their owner, by default. You can of course share the access to your personal workspace with other users. Personal workspaces are accessible in the header of the application.

Personal workspaces behaviour
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 root space, either at the root of Workspaces or in sub-workspaces. By default, no workspace is available in Nuxeo so that you can create the structure needed for your project. You can create as many workspaces and sub-workspaces as you need.

Workspaces can be created from scratch or from a template.

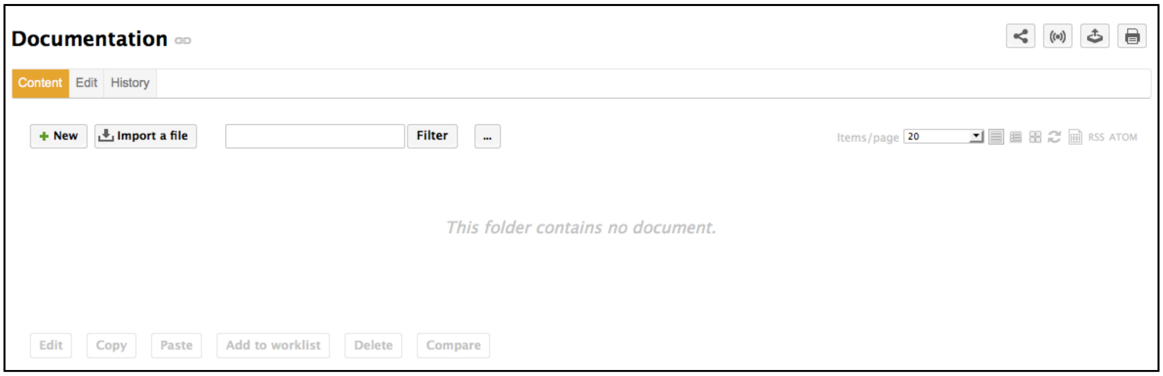
On this page

Creating a Workspace from Scratch

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

To create a workspace:

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



Creating a Workspace from a Template

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

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

To create a workspace from a template:

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

Editing a Workspace

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

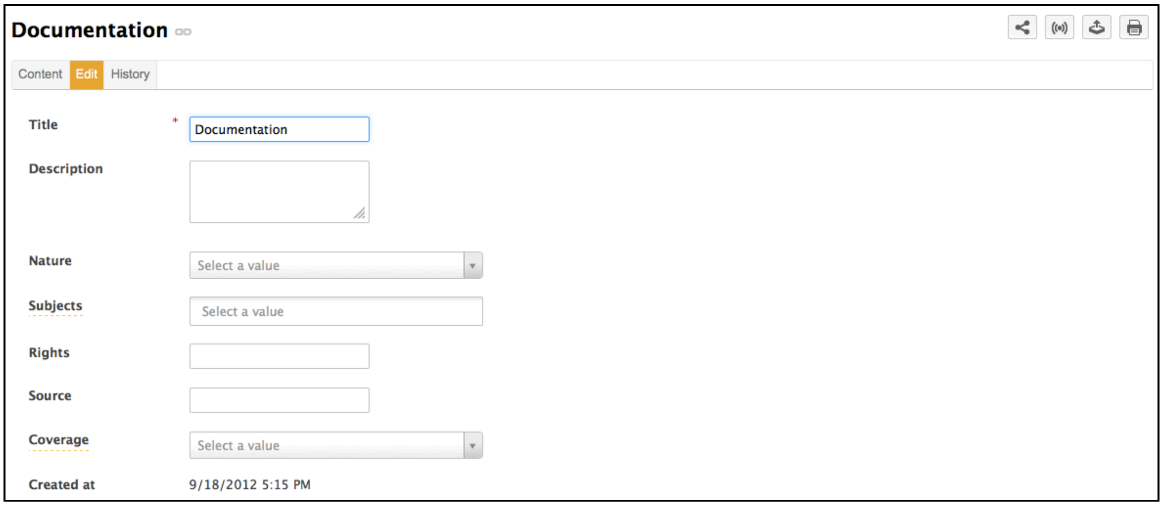
When you edit a workspace, you can edit its properties (title and description) and its metadata. The metadata of workspaces are the same as for all the other documents:

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

Contributors	Users who modified the document. This field is automatically filled in by the system.
Last contributor	Last user who modified the document. This field is automatically filled in by the system.

To edit a workspace:

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



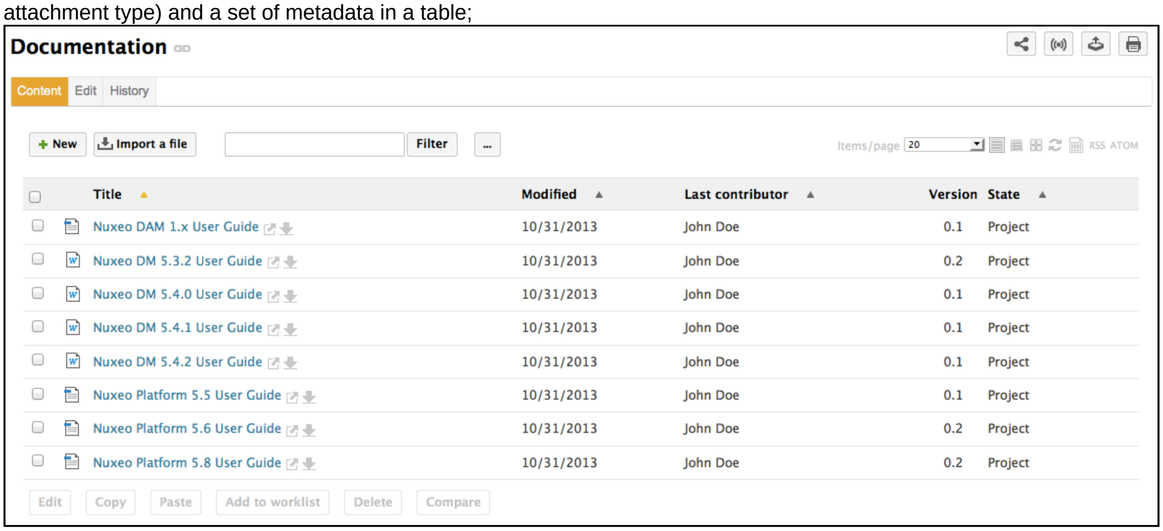
3. Optionally type a comment to keep track of why you edited the workspace.
4. Click on the **Save** button.
   Modifications are saved and the fact that you edited the workspace is tracked in **History** tab.

Changing Workspace Content Presentation

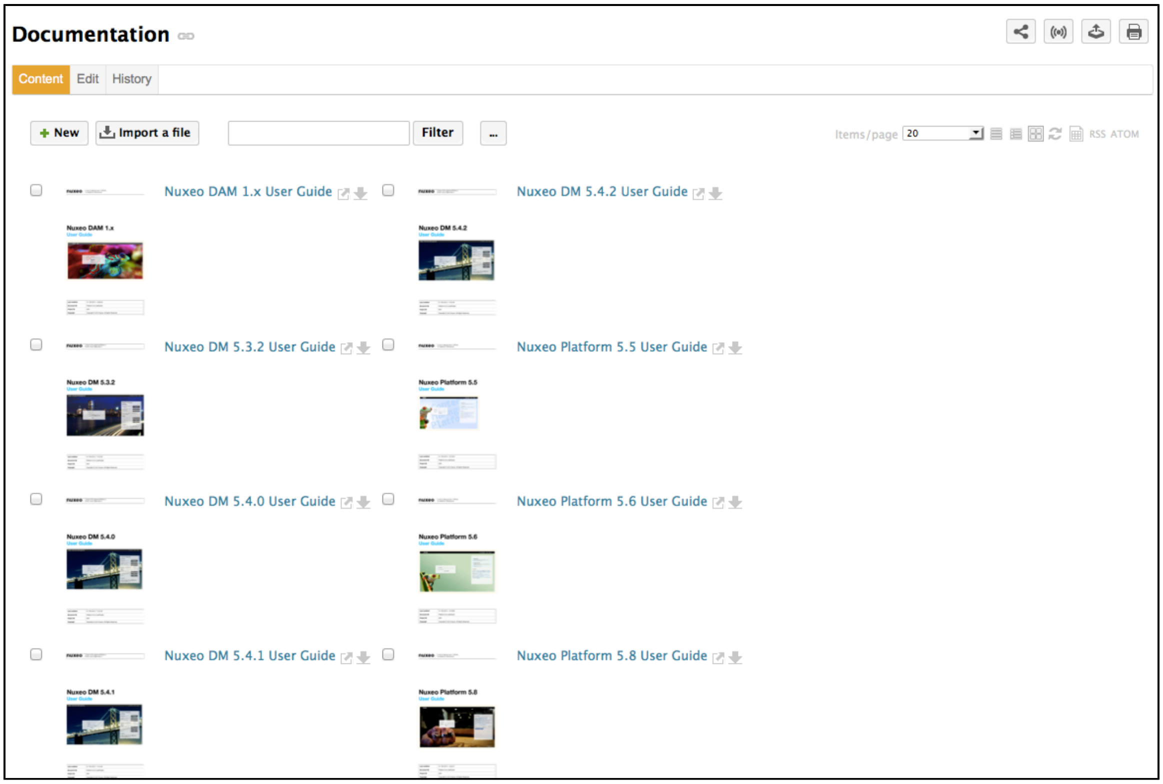
Users can change the way content is presented in the folderish repositories (workspaces, folders, sections).

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

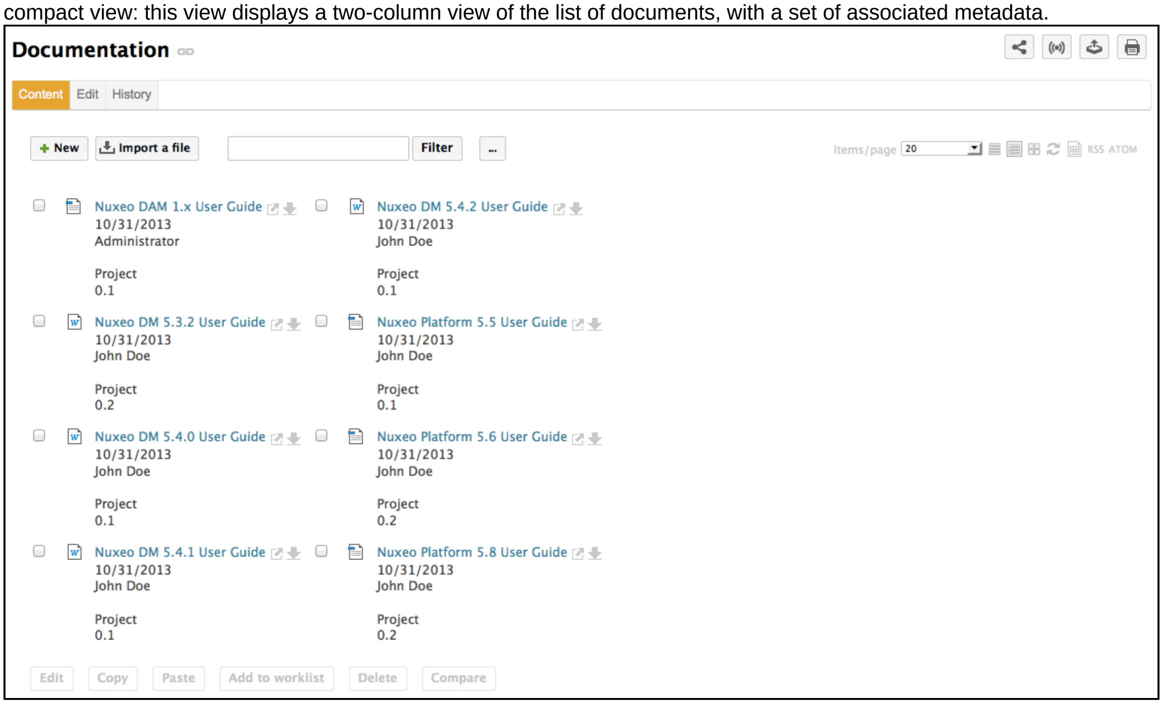
- list view (default view): this view displays title of the documents with a small icon (that depends on the type of document or main attachment type) and a set of metadata in a table;



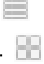
- icons view: this view displays a thumbnail of documents. Thumbnails are available by default for pictures. For folders, the thumbnail of the first item in the folder is displayed.



- compact view: this view displays a two-column view of the list of documents, with a set of associated metadata.



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: 

Related topics in this documentation
• Applying a Preset Look to a Space • Unicolor Flavors Set

Customize content presentation the easy way
• Branding • Migrating my Customized Theme

Customize content presentation the hard way
• Theme • How to Override a Default Style • How to Show Theme Fragment Conditionaly

Deleting a Workspace

Only users with "write" or "manage everything" 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.

Managing a Workspace

Users with management rights can parameter the workspace.

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

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

Managing Deleted Documents

When they are deleted by users with "write" 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 "manage everything" rights can still restore them or delete them permanently.

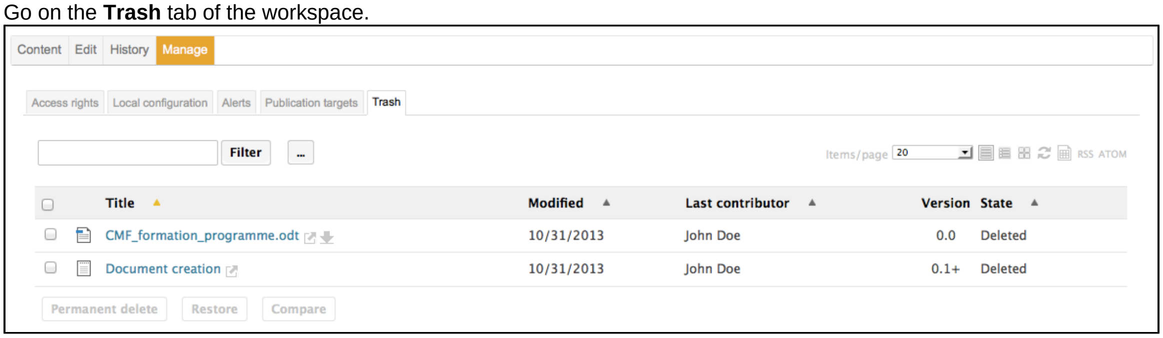
Restoring Documents

Only users with management rights can restore documents.

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

To restore a document:

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



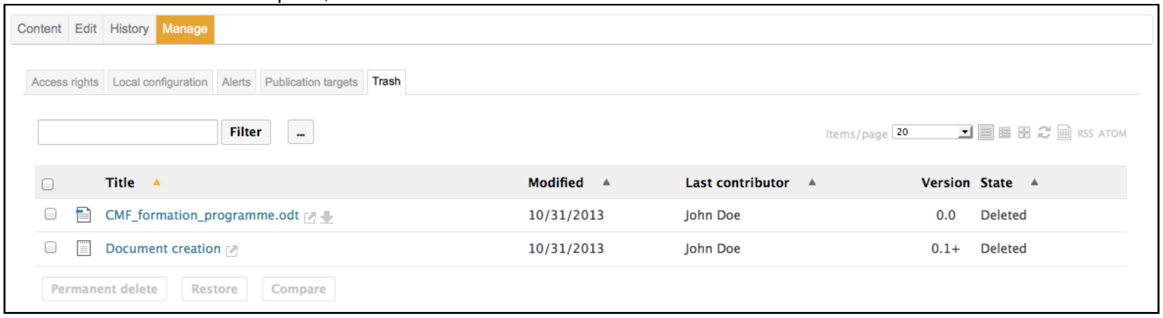
2. Check the box in front of the document's name.
3. Click on the **Restore** button.
4. On the window that pops up, click on the **OK** button.

The document is moved back into the **Content** tab of the workspace.
It takes the 'project' life cycle state, even if its life cycle state before deletion was "approved" or "obsolete".

Permanently Deleting Documents

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

To delete a document permanently:

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


2. Click on the **Permanent delete** button.
3. On the window that pops up, click on the **OK** button.
The document is permanently erased from the application. It cannot be restored.
The relations to the deleted document are deleted.

More in this documentation

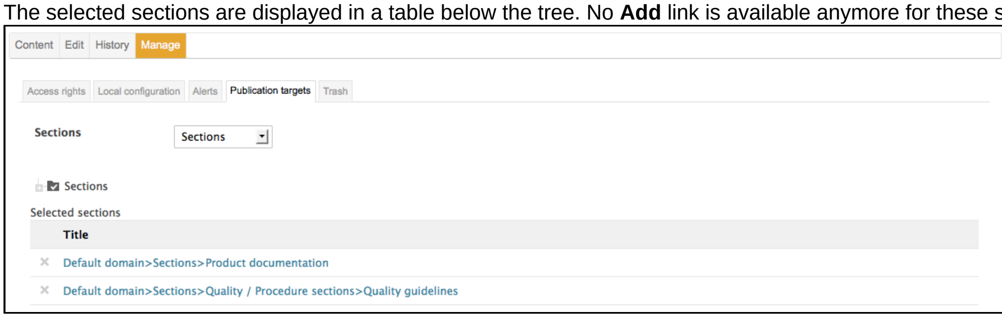
- Deleting Content

Setting Publication Targets

In order to guide users when they publish documents and make sure documents are published in the correct sections, you can define publication targets for the workspace's documents. Publishing targets are sections in which the documents from the workspace will be publishable. Users will then be able to publish documents only in the sections you have defined.

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

To define the publication targets of a workspace:

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


When they click on the **Publish** tab of documents to publish a document, only the selected sections are available to publish the document.

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

Related Documentation

- Publishing Documents
- Publisher service

Applying a Preset Look to a Space

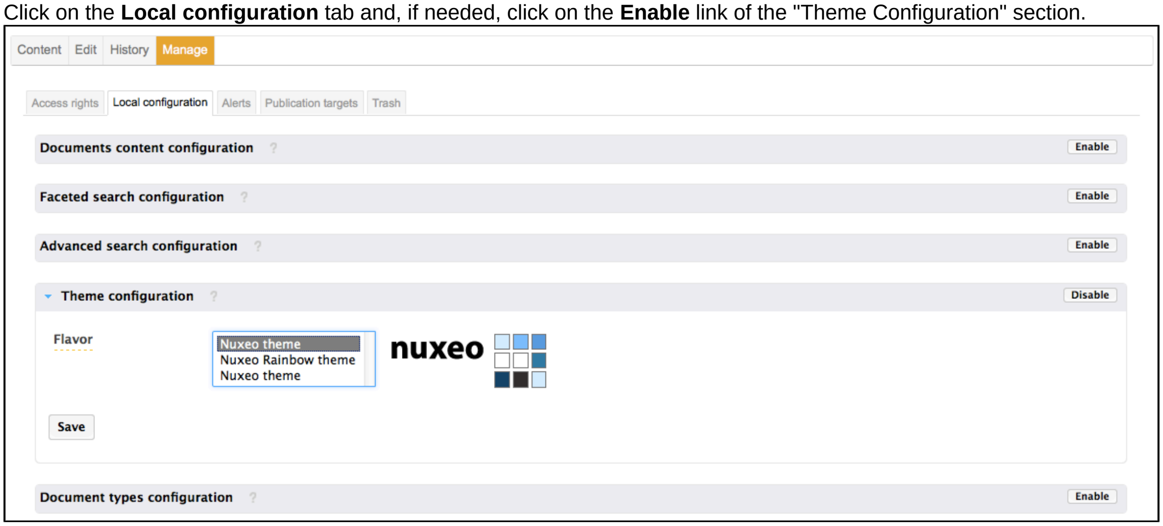
Local administrators, i.e. users with Manage right in the space, can easily apply a preset theme to a workspace, template or section. You can apply a theme to spaces only. For instance, you can change the theme of sections, so that they look different from workspaces, but you cannot change the look of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

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

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

To change the theme of a workspace:

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



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

Related pages in this documentation

- Changing the Presentation of Document Lists
- Unicolor Flavors Set

Related topics in other documentation

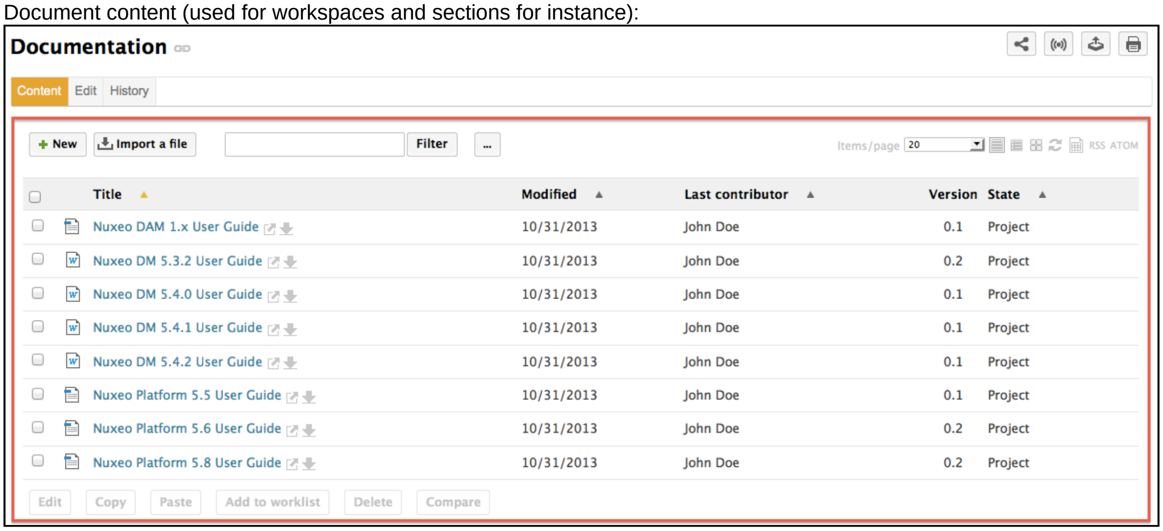
- Branding in Nuxeo Studio

Changing the Presentation of Document Lists

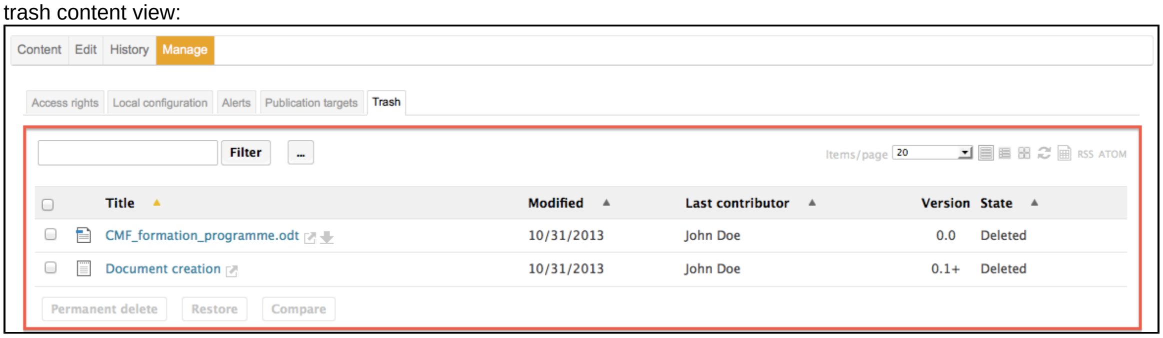
From the "Local configuration" sub-tab of the **Manage** tab, you can set preferences on what content can be created in the current space, how the lists of content should be presented, customized search features...

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

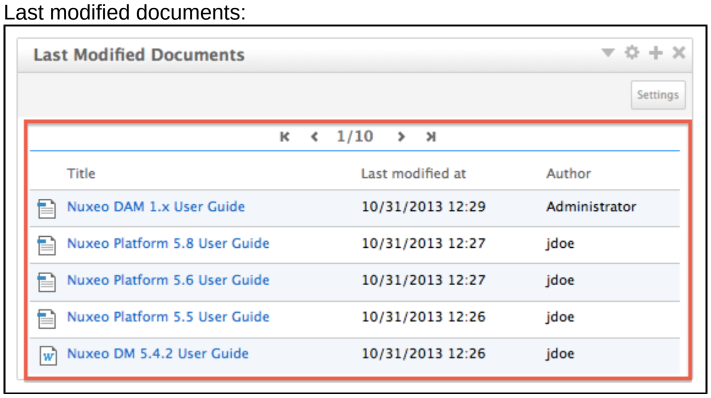
- Document content (used for workspaces and sections for instance):



- trash content view:



- Last modified documents:



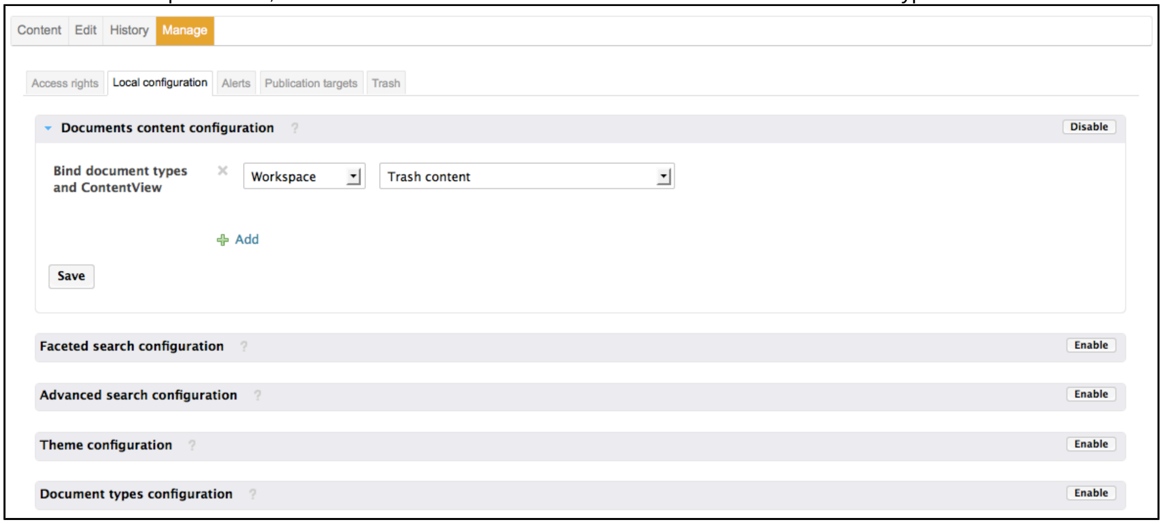
You can define what content view will be used for folderish documents (i.e. documents in which you can create other documents) in the current space. This is inherited in the folderish documents of the space from which you define these preferences.

Customized content views
You can leverage this feature when you customize the Nuxeo Platform and create new content views. Your content view will then be available in the drop down list and you can use locally for documents. You can read How to define a new view using Nuxeo Online Services.

To associate a document type and a content view:

1. Click on the **Manage** tab of the current space.
2. Click on the **Local configuration** sub-tab.
3. If needed, click on the **Enable** link of the "Documents content configuration".
   The document content configuration form is displayed.
4. Click on the **Add** link to define a new document type - content view association.

5. In the first drop down list, select the document type.
6. In the second drop down list, select which content view will be used for the selected document type.



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

To remove a document type - Content view association

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

Related pages in this documentation
• Managing a Workspace • Applying a Preset Look to a Space

Defining the Authorized Document Types

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

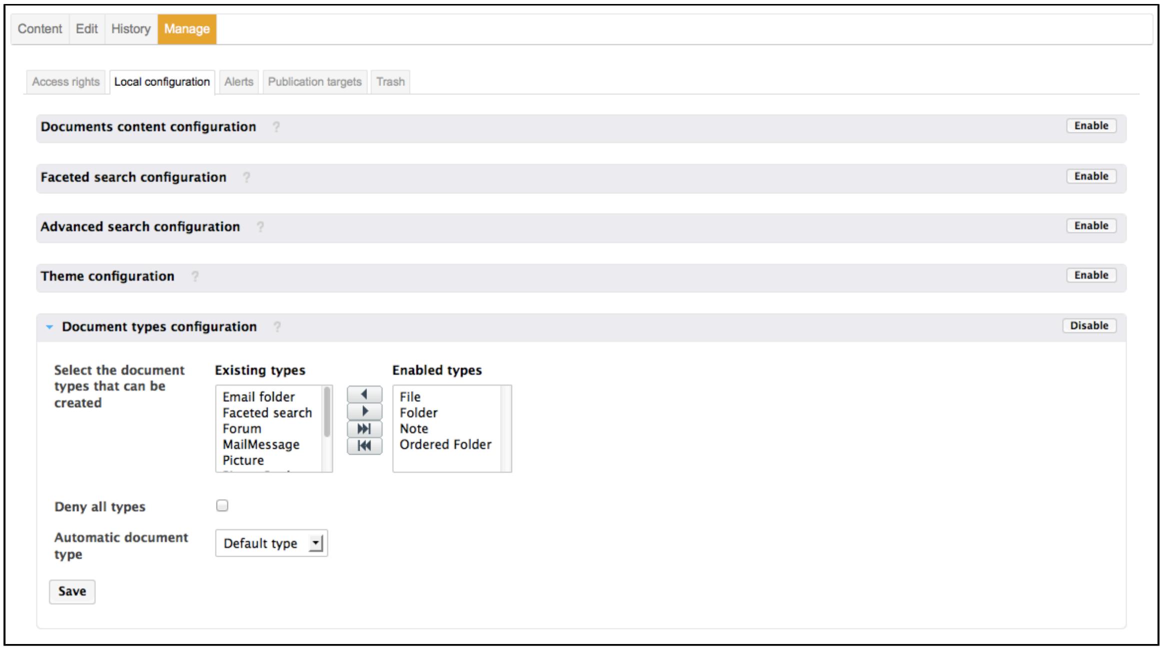
Defining What Document Types Can Be Created

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

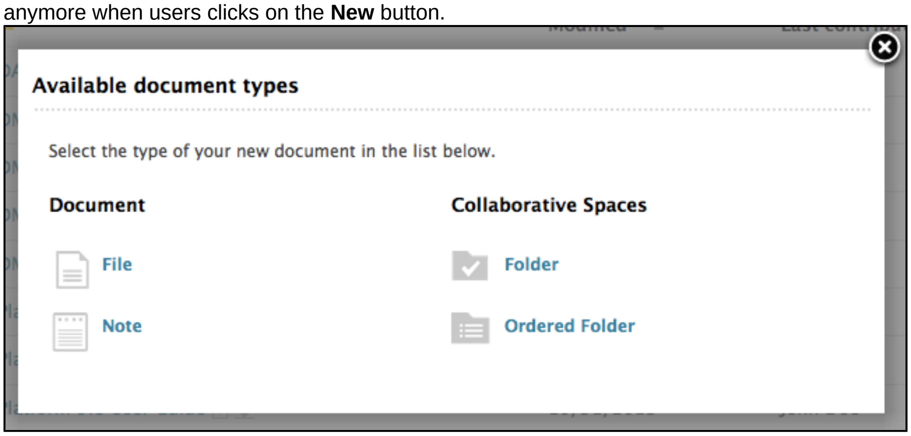
To define what document types can be created in a space:

On this page

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



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

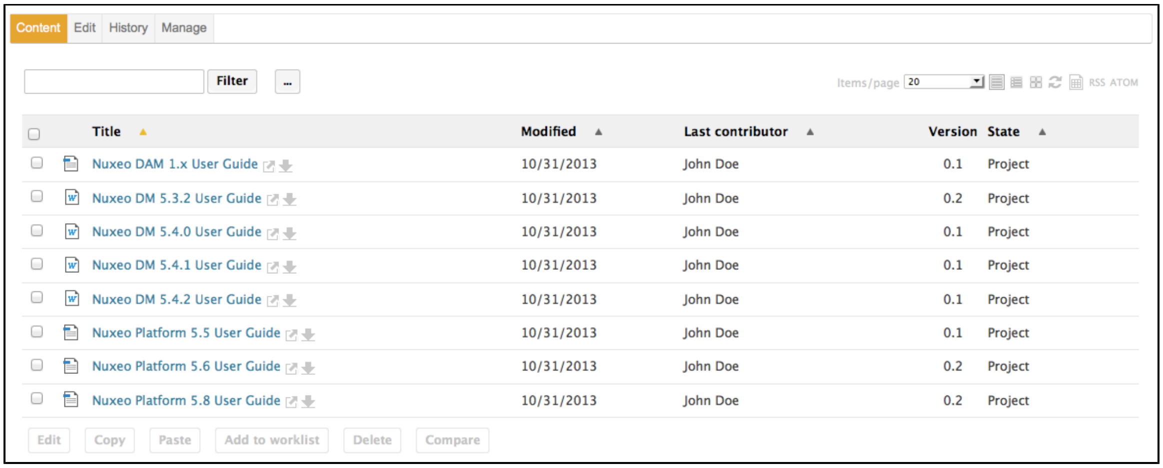


Denying the Possibility to Create Documents

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

To prevent new document creation:

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



Selecting the Default Document Type

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

To define the default document type for import:

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

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

Related pages in this documentation

- Managing a Workspace
- Changing the Presentation of Document Lists

Local Search Configurations

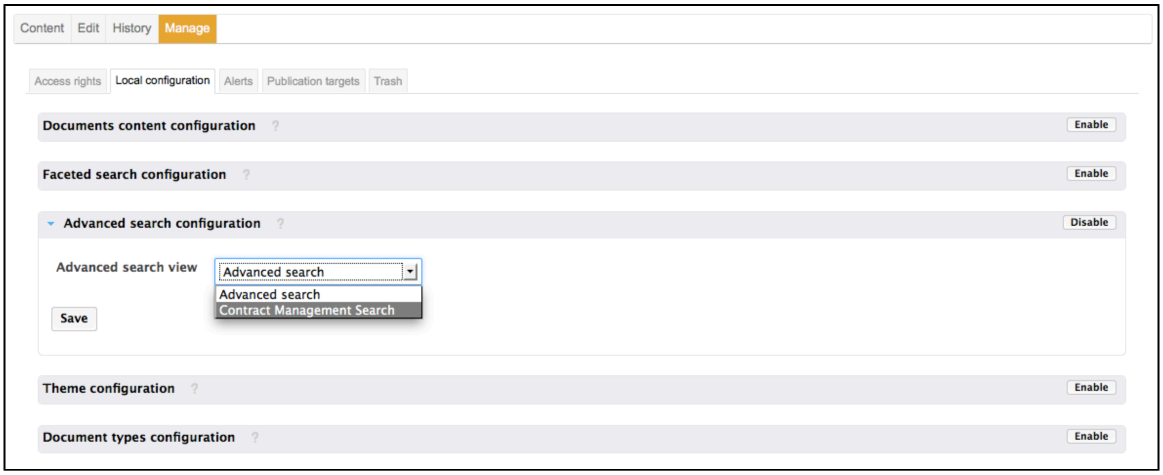
If customized faceted search and advanced search forms have been contributed, it is possible to define what faceted search or advanced search to display from a space. This enables users to have search forms adapted to the documents and processes used in the space.

Changing Advanced Search Form

You can have only one advanced search form enabled.

To enable a contributed advanced search form:

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



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

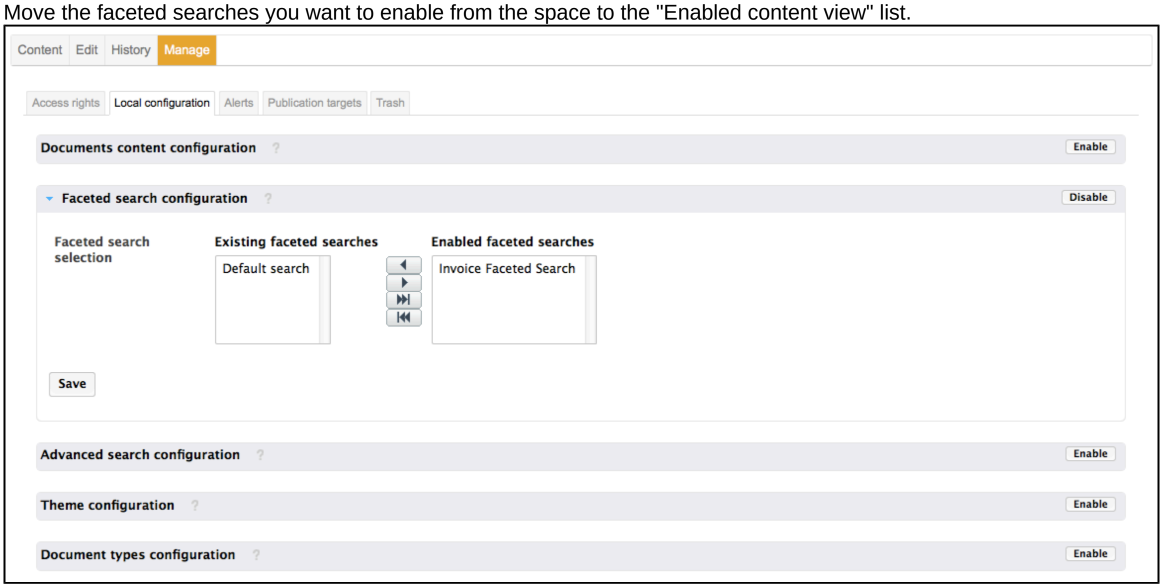
Changing Faceted Search

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

> **Faceted search availability**
> Faceted search is available on the Document Management module.

To enable contributed faceted searches:

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



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

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

Working with Documents

The Nuxeo Platform enables you to create, edit and share documents within the application.

Available Documents

Depending on what you're using, the naked platform or the Document Management module, you don't have exactly the same documents available. Documents are sorted in two categories:

- Collaborative services
- Documents

Collaborative services are folderish documents that enable users to share information.
The naked Platform collaborative services are:

- Workspaces
- Folders
- Forum

The Document Management module add a new collaborative service:

- Picture book
- Mail folder

Documents available in the naked Platform are:

- The note: a text typed in a rich editor integrated to the Nuxeo Platform;
- The file: an attached file.

The Document Management module adds the documents below:

- The picture: a picture file with specific features available.

Documents Evolution

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

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

To change the life cycle state of a document, you need to submit it to a workflow.

Creating Content

You need to have "write" or "manage everything" rights to create documents.

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

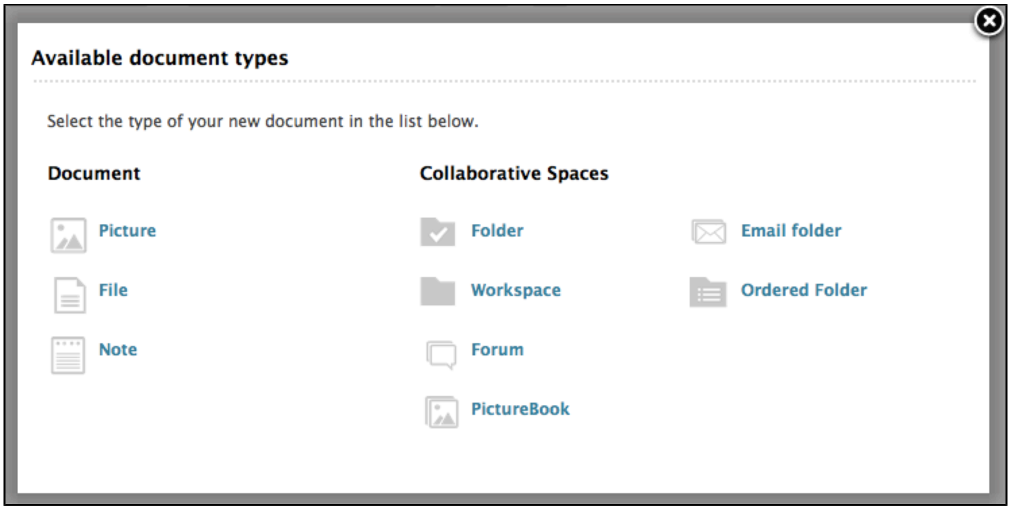
On this page

Creating a Document Using the New Button

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

To create a document using the New button:

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



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

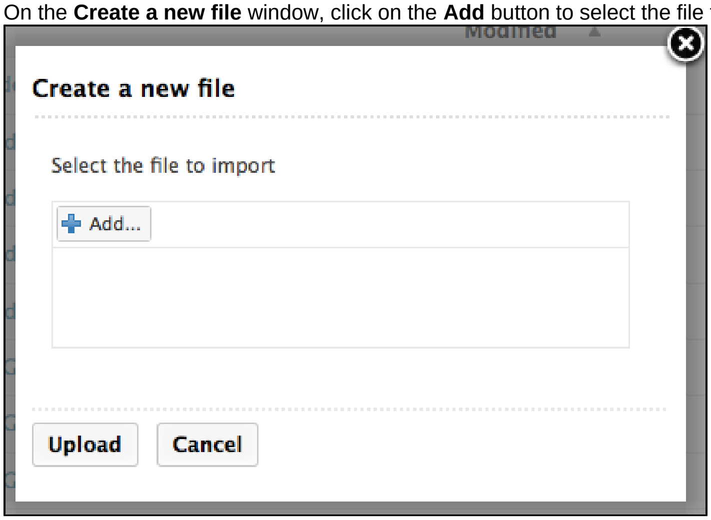
The **Summary** tab of the document is displayed.

Creating a Document Using the Import a file Button

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

To create a document using the Import a file button:

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



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

Editing Content

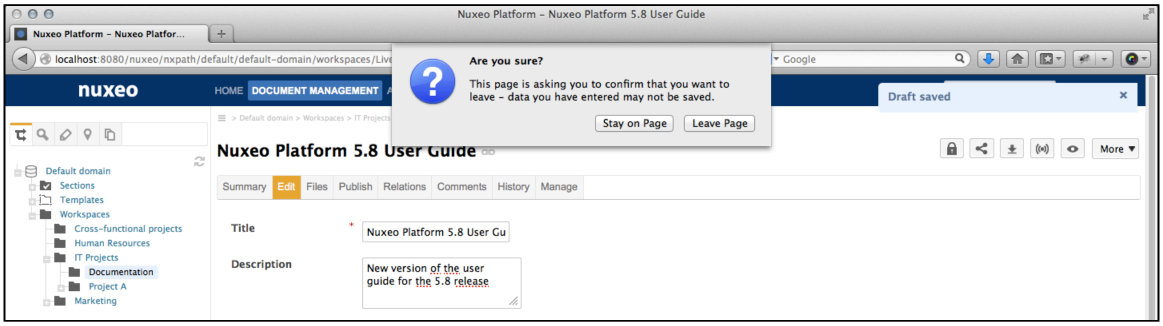
Documents can be edited by users with writing rights in a folder.

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

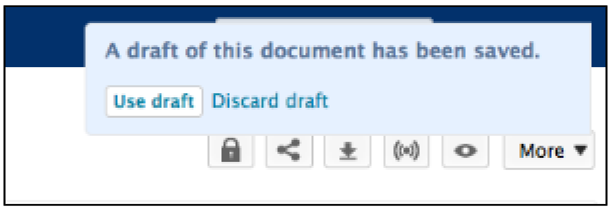
Document modification means:

- Editing or changing the attached file of a file document,
- Editing the text of a note,
- Or simply editing the title, description or any metadata of the document.

The Nuxeo Platform includes a safe edit mechanism that prevents you from inadvertently leaving an edit form without saving. This mechanism consists in displaying a popup for you to confirm you really want to quit without saving when you edit a document and try to quit the edit form or close the browser's window without clicking on the Save button.



In browsers that allow it, a draft is automatically saved for recovery.

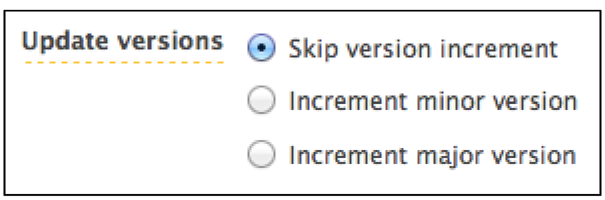


On this page

Versioning Overview

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

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



When you edit a document and save your modifications, you have several options regarding the versioning of your document.

Let's say that your current document version is 0.1.

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

Version number 0.0
When a document is created, its version number is 0.0. This is considered as a draft of the document, which will need to be saved into a first version, either minor or major. Draft version 0.0 is not archived and the + behavior described above does not apply to 0.0 draft.

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.

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

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

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

> **Virtual navigation**
> Coverage and subjects are used for virtual navigation.

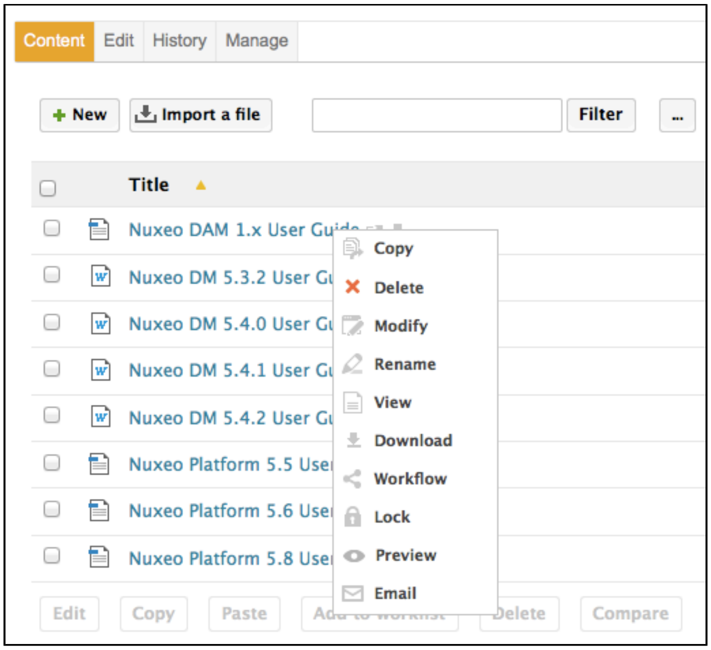
To fill in or change the metadata of the document, just edit the document.

Editing a Document

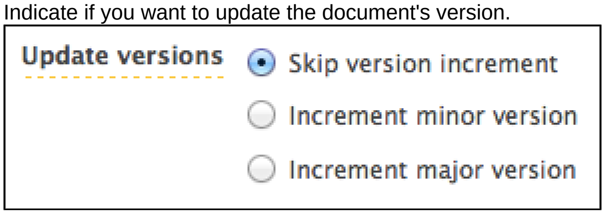
To edit a document:

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

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



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



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.

> **Office document modification**
> MS Office and OpenOffice.org documents can be edited directly in their native application using Live Edit or WSS/WebDav.

Bulk Editing

It is possible to edit several documents at the same time. When you bulk edit documents, you can edit a set of their metadata. You can bulk edit documents from:

- a folder **Content** tab,
- search results, whatever the search you are using,
- a virtual navigation list of documents.

> **Bulk edit overwrites previously filled in values**
> If you edit metadata for which the document(s) already had a value, the previous value will be replaced by the one you select on the bulk edit form.

To edit several documents at the same time:

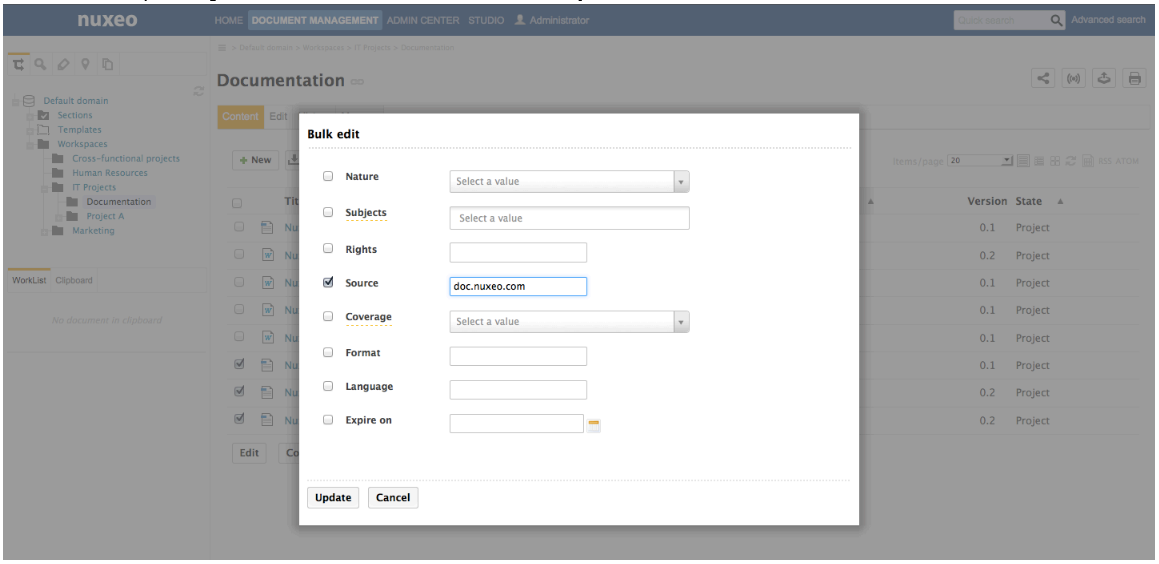
1. Select the documents to edit using the checkboxes on the documents list.

   > **Document selected in other pages remain selected**
   > When you navigate from page to page, you selection is not lost and you can bulk-edit documents that are not on the same page.
   >
   > **There is a drawback:** You must make sure to bulk-edit only the correct documents (i.e. there are no checked documents in other pages that, in fact, you don't want to edit.).

2. Click on the **Edit** button displayed at the bottom of the list of documents.

The bulk edit form is displayed in a popup window.
All values are empty by default.

3. Fill in the relevant metadata and leave other values empty by default.
   The box corresponding to the edited metadata is automatically checked.



> **Bulk edit overwrites previously filled in values**
> If you edit metadata for which the document(s) already had a value, the previous value will be replaced by the one you select on the bulk edit form.

4. Click on the Save button.
   The selected documents are all modified with the selected values, after a new minor version has been saved for each document. Other values are left as they were.

> It is possible to change the default bulk edit versioning policy. See the page Bulk Edit in the developer documentation.

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.

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

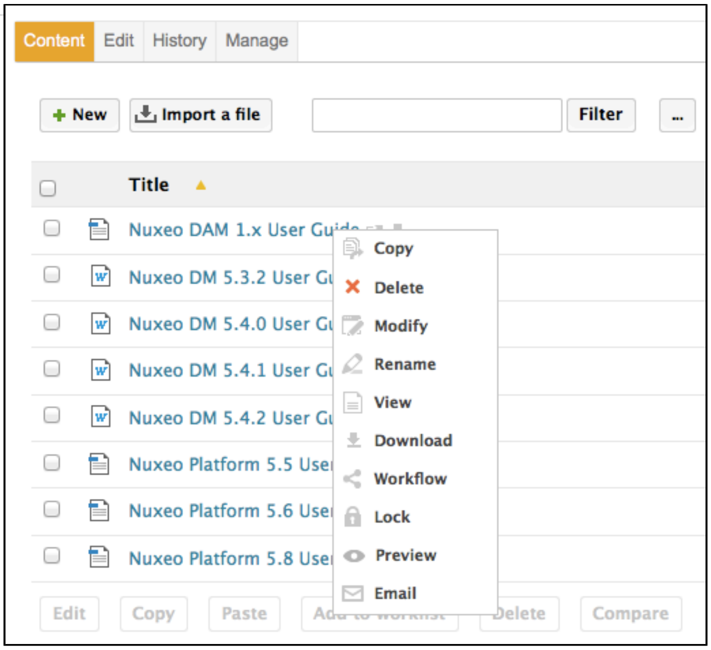
- Deleting it from the workspace content table,
- Submitting the document to an workflow, with the destination lifecycle state 'deleted'.

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:

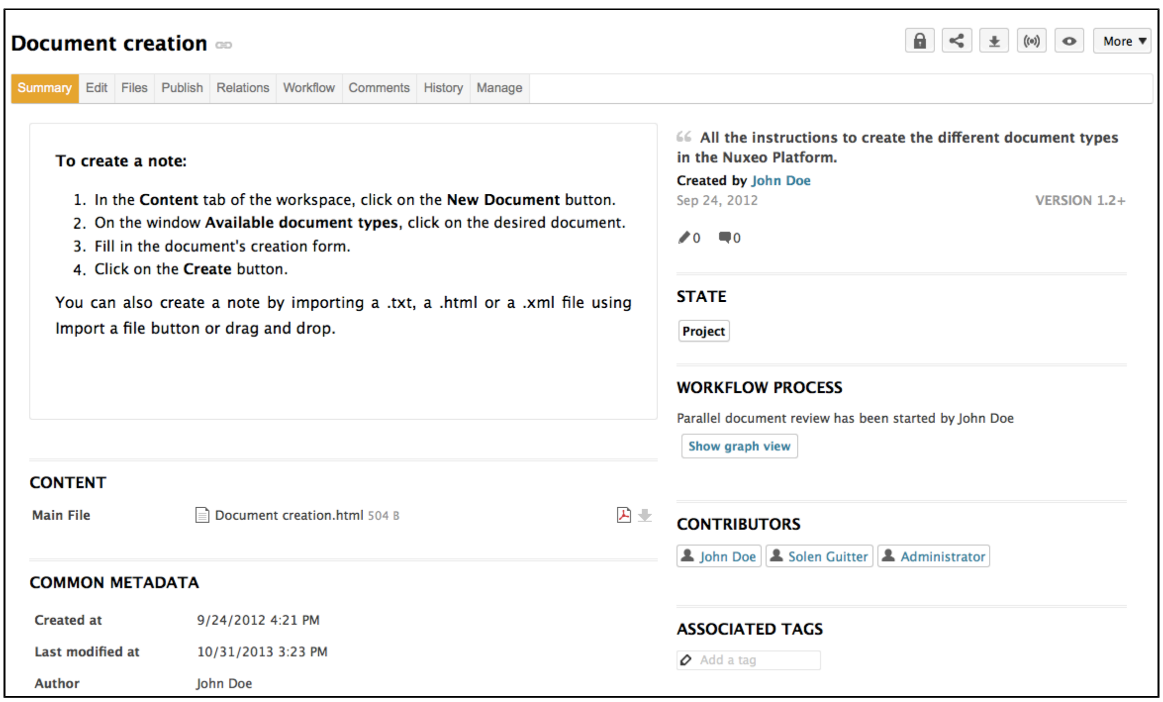
1. In the **Content** tab of the workspace, check the box in front of the document's name.
2. Click on the **Delete** button.
3. On the window that pops up, click on the **OK** button.
   The document is moved to the **Trash** tab of the workspace (available to users with management rights only) and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

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

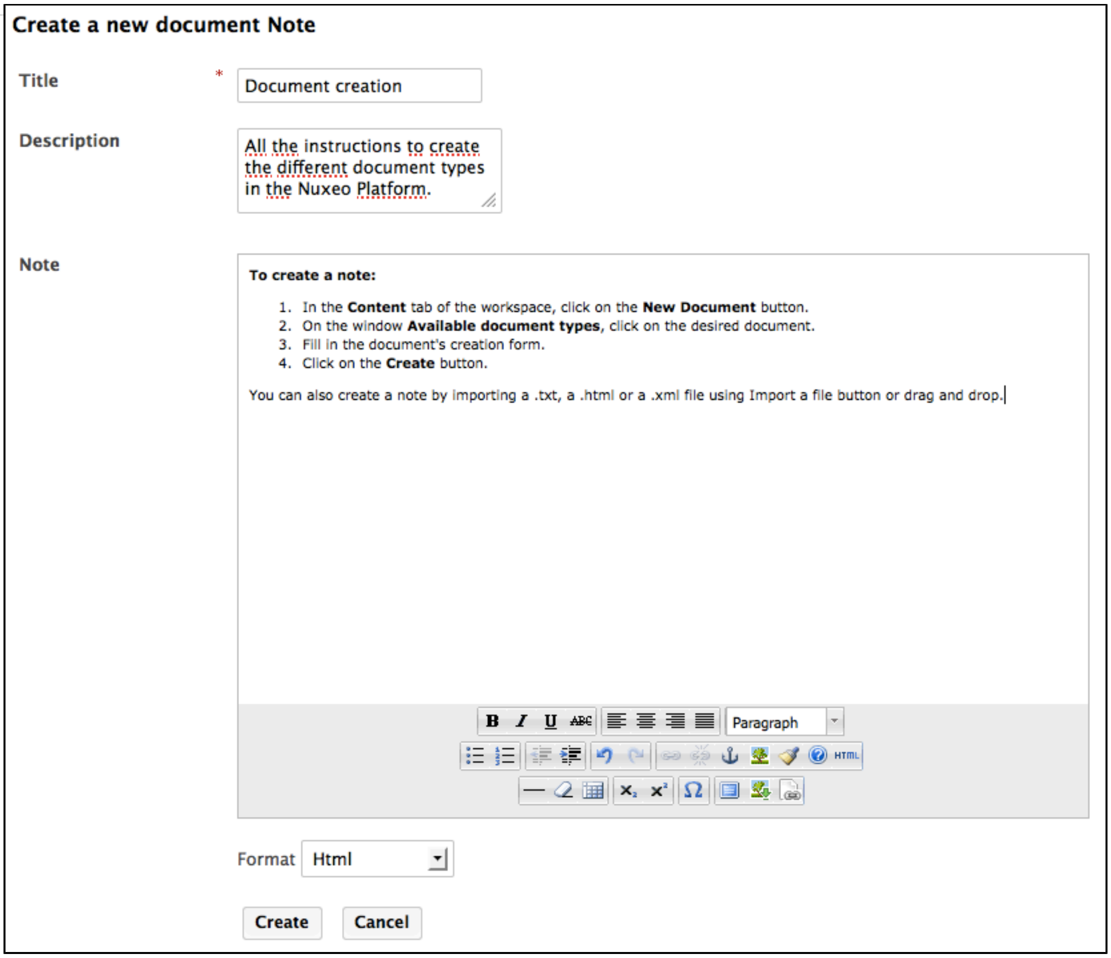


Notes

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



The default format of the note is HTML. The other formats available are .txt, .xml and Markdown.

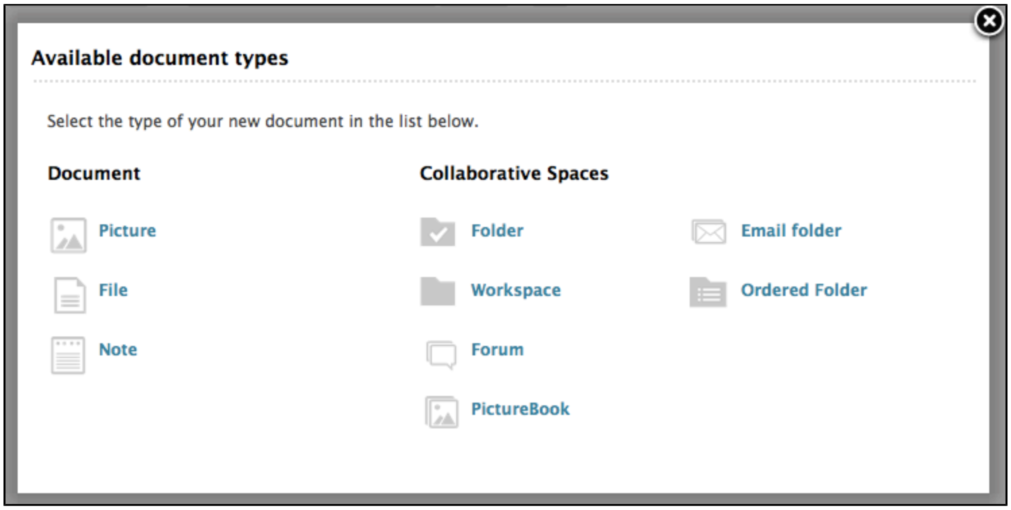


A note is composed of the fields below:

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

To create a note:

1. In the **Content** tab of the workspace, click on the **New** 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.

Other ways to create a note
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.

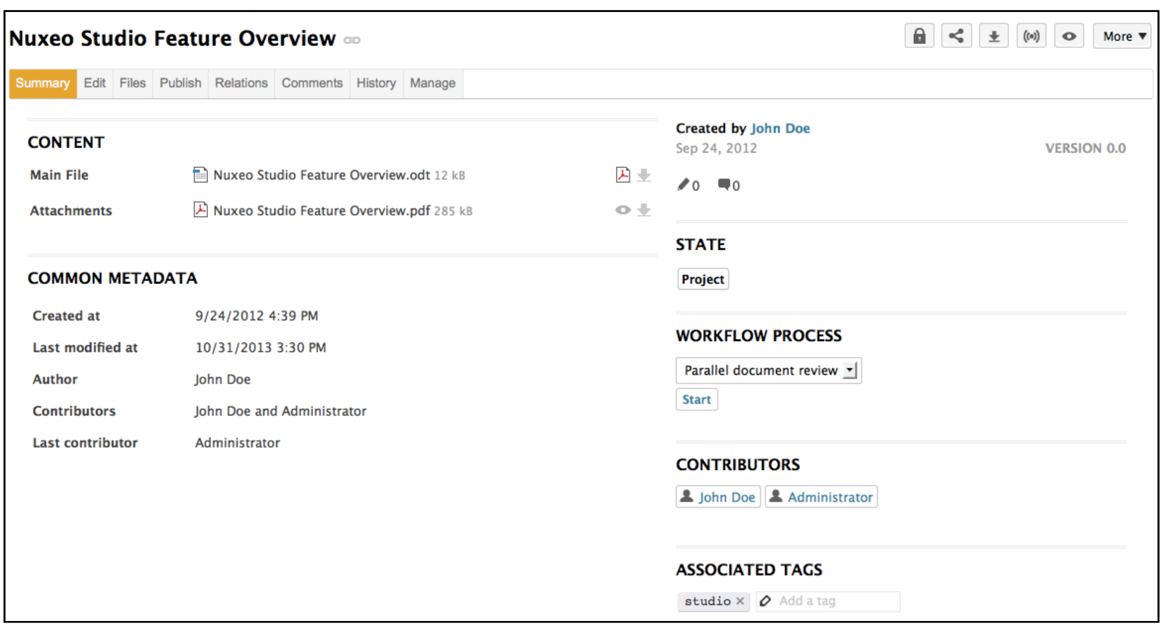
Files

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

You can upload files of any format.

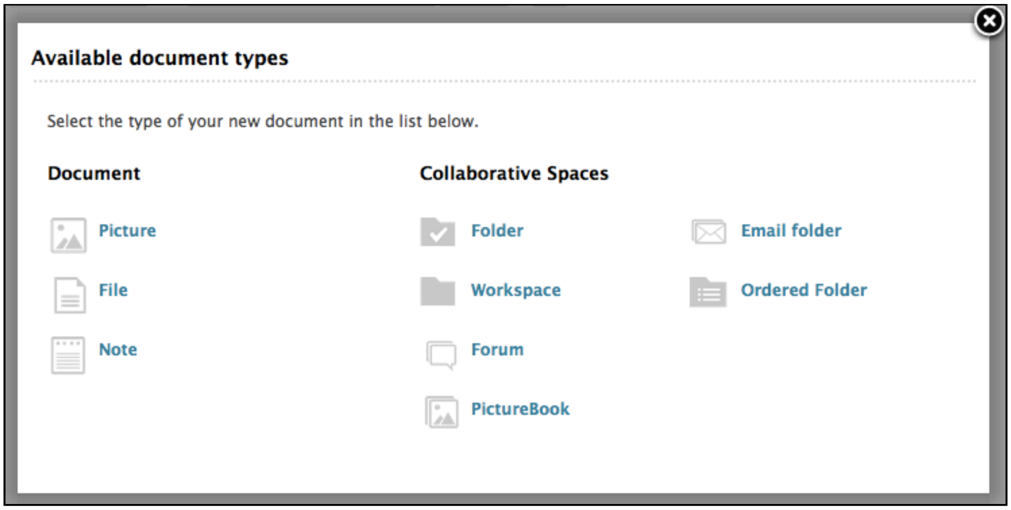
A file is composed of:

- 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** 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.

> **Other ways to create a file**
> 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: regular folders and 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, documents are manually sorted. So, the orders in which documents are listed in the folder doesn't depend on one of its properties (version, author, etc); you decide where it should be displayed in the list. When a document is created, it is added at the end of the list. It is not possible to sort documents automatically by clicking on the columns titles in an ordered folder.

On this page

Regular Folders

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

- Create documents and do all the actions available on them (edit, approve, manage relations, etc)
- Manage access rights,
- Subscribe to and manage alerts,
- Manage the folder's trash.

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

Ordered Folders

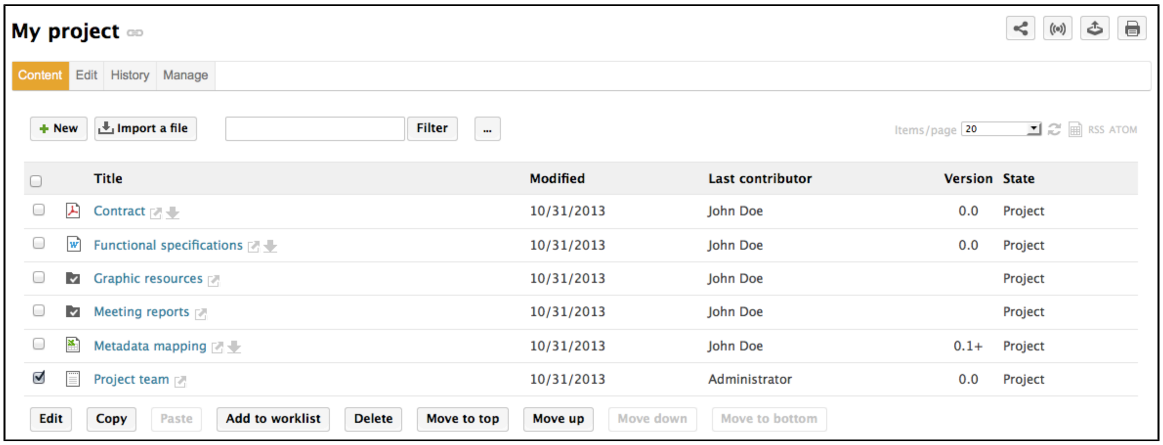
Ordered folders are folders in which you can change the content's order.

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

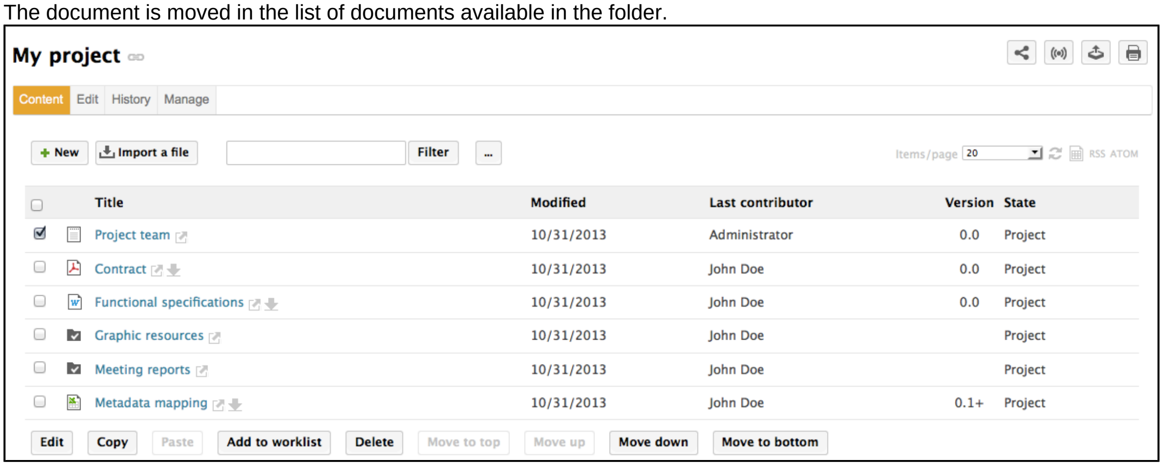
- Move up
- Move down
- Move to top
- Move to bottom

To change the content's order:

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



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



> **Moving documents restrictions**
> You can move one document at a time. If you select more than one document, the move buttons will deactivate.

Working Using Drag and Drop

The Nuxeo Platform allows the import of documents from your desktop using drag and drop.
Drag and drop is based on the HTML 5 standard and is available on all browsers that support the HTML 5 Drag and drop, without extension. Basically, this includes Firefox 3.6+, Chrome10+, Safari 5+.

For other browsers or older versions, you may need to install an extension to enable drag and drop import.

Internet Explorer requires the installation of an extension:

- Drag & Drop Latest Stable for IE Extension (.msi)
- Drag & Drop MSI install helper for Windows 2000 (.exe)

> **Enabling drag and drop on Internet Explorer**
> Because of server security contraints, drag and drop is not enabled for Internet Explorer by default. See the page Enabling Drag and Drop for Internet Explorer which provides a workaround this contraint.

Importing Content Using Drag and Drop

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

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

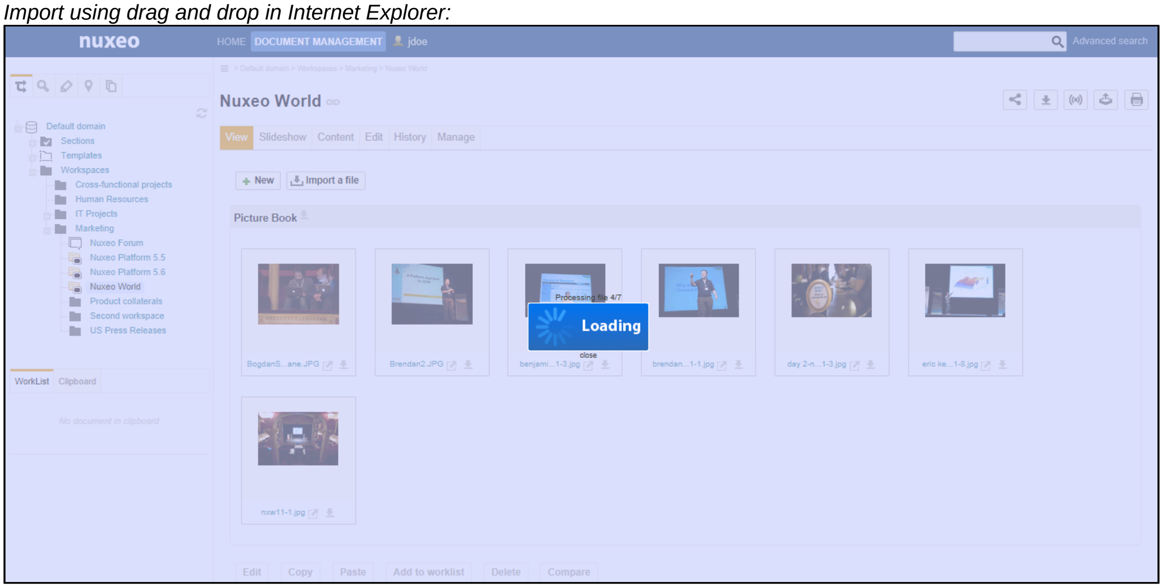
Quick Import of Documents

To import content into Nuxeo, drag an item from your computer and drop it into a workspace. The document is then automatically created in the workspace and its title is the name of the original file, and no metadata is filled in. You can also drop files in your worklist. The document is then created in your personal workspace.
You can drag and drop one or more files in Nuxeo.

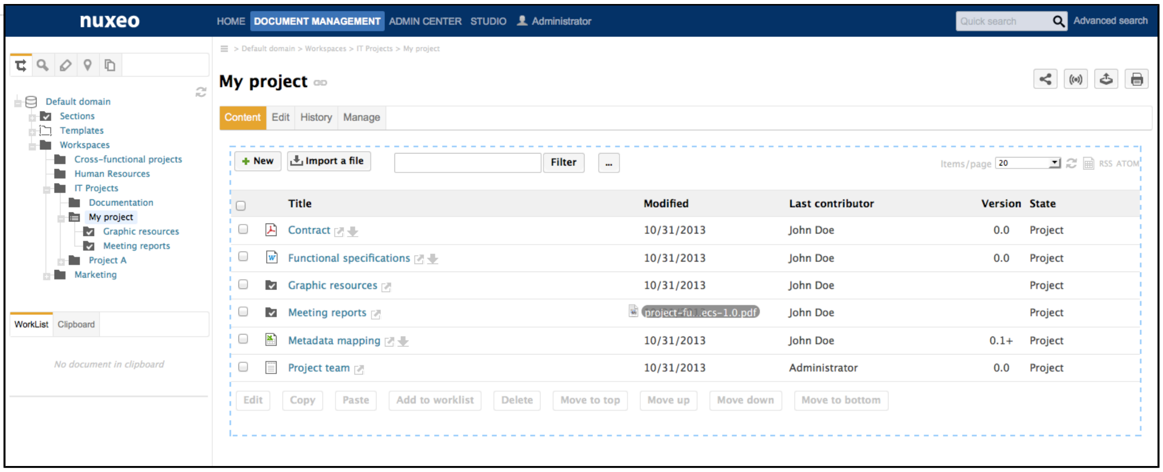
> **Drag and drop of folders**
> Drag and drop of folders is possible only with the Internet Explorer extension. The complete structure of the dropped folder is then reproduced and created in Nuxeo.
> For security reasons, the HTML5 standard, used by the other browsers, doesn't allow to drop a folder. You can however drop several documents at the same time to fill a folder with many documents in a single manipulation.

> **Enabling drag and drop on Internet Explorer**
> Because of server security contraints, drag and drop is not enabled for Internet Explorer by default. See the page Enabling Drag and Drop for Internet Explorer which provides a workaround this contraint.

Import using drag and drop in Internet Explorer:



Import using HTML5 drag and drop in Firefox:



You can drop any file type in Nuxeo.

Here are some examples of most commonly used item types and their output in Nuxeo:

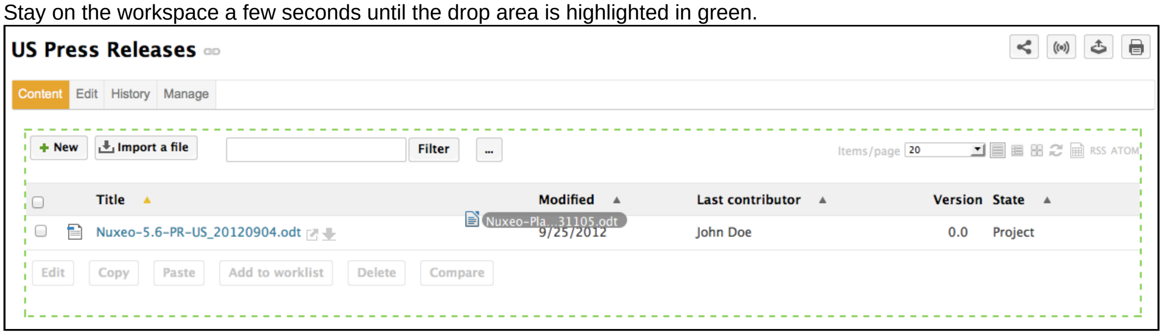
Item type	Document created in Nuxeo
Folder	Folder
Microsoft Office file	File
OpenOffice.file	File
.txt file	Note
Picture (.jpg, .png, etc)	Picture

Import with Metadata

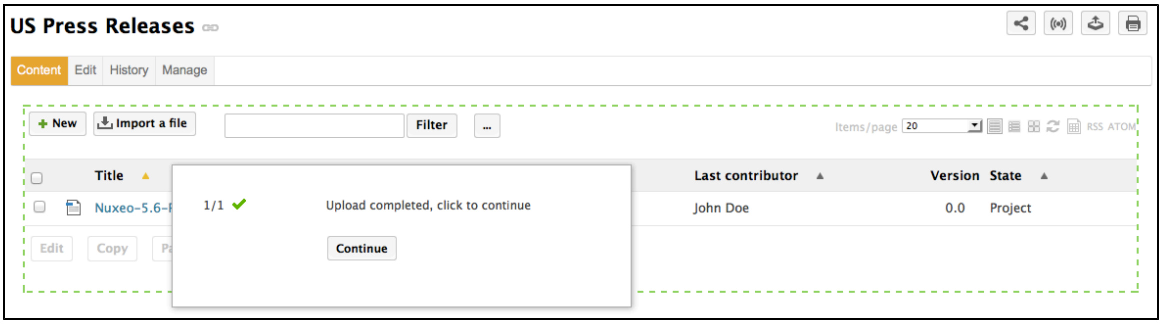
Prerequisite
Import with metadata is available only on browsers that support the HTML 5 drag and drop standard.

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

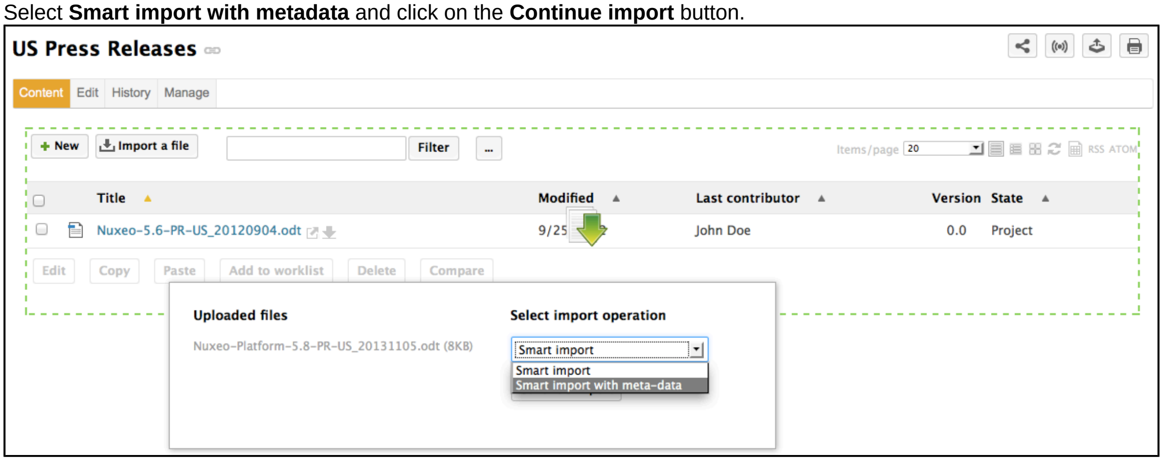
To import documents with metadata:

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

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

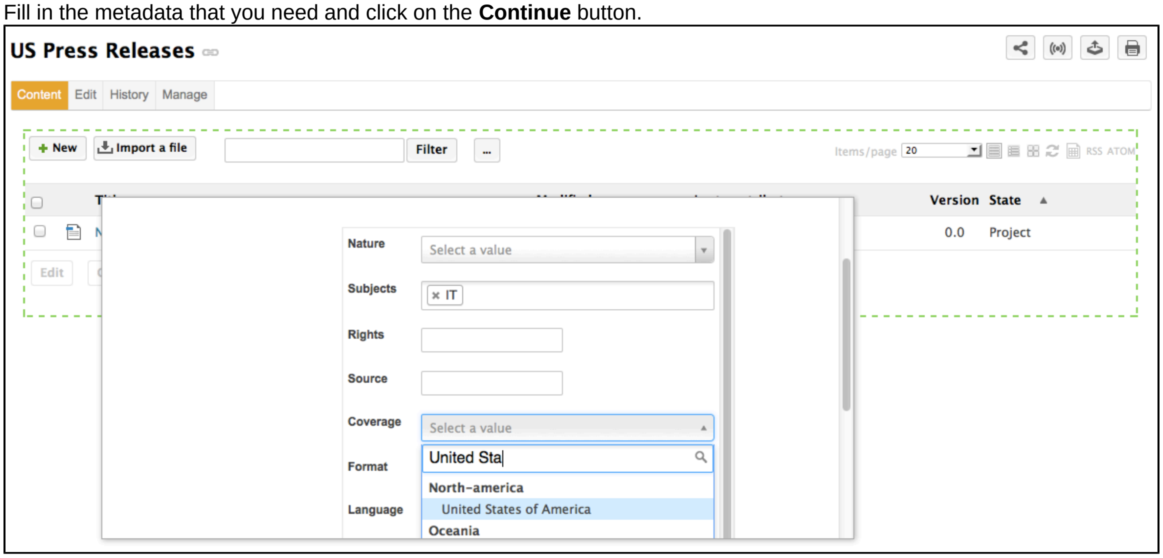


4. Click on the icon or the "Continue" button.
   A window pops up, that enables you to select if you want to do a quick import (smart import) or an import with metadata.
5. Select **Smart import with metadata** and click on the **Continue import** button.

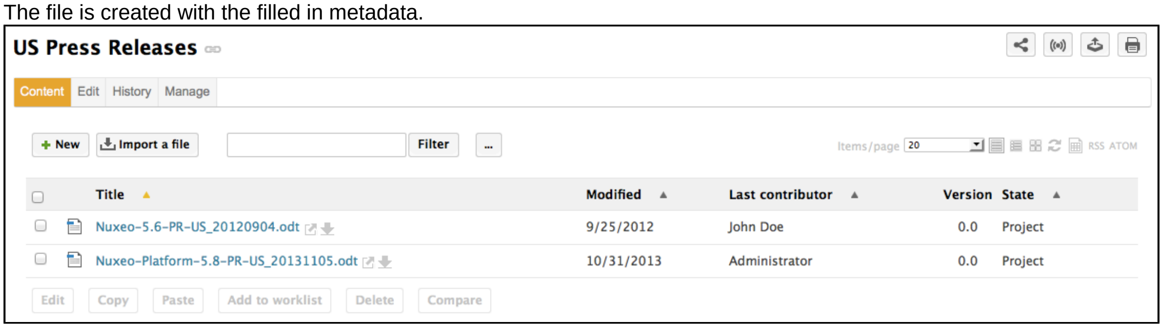


The metadata are displayed on the pop up window.

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



The file is created with the filled in metadata.



Installing Drag and Drop Extensions

If you're using Firefox, no extension is needed to work with Drag and Drop, unless you're using a version older than 3.6.
If you're using Internet Explorer, you need to install an extension to be able to create documents using drag and drop.
For other browsers, drag and drop is automatically enabled if you're using a recent version that supports the HTML 5 standard.

Installing Internet Explorer Extension

To make drag and drop available on Internet Explorer, you need to install the Internet Explorer extension.

The extension is available in two formats:

- .exe extension: includes the drag and drop package and the needed dependencies (required for Windows 2000)
- .msi extension: includes only the drag and drop package

To install the Internet Explorer extension, follow the instructions of the installer. Installation should be done for everyone, not just for the current user.

Installing Firefox Extension

If you're using a version older than Firefox 3.6, you need to install the Firefox drag and drop extension. From Firefox 3.6, the HTML 5 drag and drop is automatically enabled.

It comes as a standard Firefox add-on. Installing process is the same as the other available Firefox add-ons: click on the link above and follow the instructions.

Drag and Drop Compatibility Table

Nuxeo Platform 5.6

Browser version	File Drag & Drop	File Drag & Drop with metadata	Multi-file Drag & Drop	Multi-file Drag & Drop with metadata	Folder Drag & Drop
Firefox 3.6					X
Firefox 14					X
Chrome 20					X
Safari 5.1.7 (Mac OS X)					X
Internet Explorer 7 (Win XP)	X	X	X	X	X
Internet Explorer 7 (Win XP) with D&D plugin					
Internet Explorer 7 (Win XP) with Google Chrome Frame			NXP-9783		X
Internet Explorer 8 (Win XP)	X	X	X	X	X
Internet Explorer 8 (Win XP) with D&D plugin					
Internet Explorer 8 (Win XP) with Google Chrome Frame			NXP-9783	NXP-9783	X
Internet Explorer 8 (Win 7)	X	X	X	X	X
Internet Explorer 8 (Win 7) with D&D plugin					

Internet Explorer 8 (Win 7) with Google Chrome Frame	NXP-9783		NXP-9783	NXP-9783	X
Internet Explorer 9 (Win 7)	X	X	X	X	X
Internet Explorer 9 (Win 7) with D&D plugin					

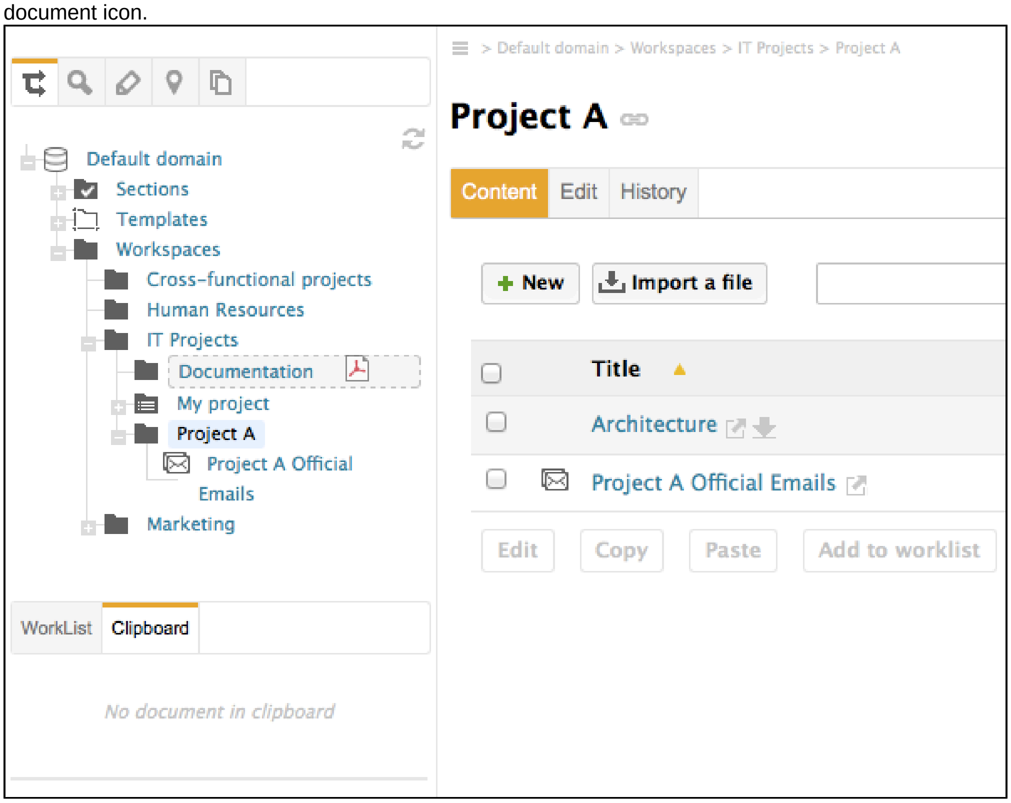
Caption: = Working ; X = Not supported ; ? = Unknown

Moving Documents Using Drag and Drop

It is possible to move documents and publish them using drag and drop. Based on JavaScript these features are available on all JS-compatible browsers.

Usually documents are moved using the worklist or the clipboard. But you can also quickly move documents individually from a workspace to another using drag and drop.

1. Go in the workspace where the document to move is located.
2. Unfold the navigation so the target workspace is visible.
3. Drag the icon of the document to move onto the target workspace in the navigation tree until the workspace is highlighted, and drop the document icon.



The document is immediately moved.

Desktop & Office Suites Integration

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

- **Nuxeo Live Edit** enables you to create and edit office documents in their native application from the Nuxeo Platform. 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 and WebDAV** enable you to work on Nuxeo's documents from your desktop directly. They don't require the installation of any extension.

Working with Live Edit

Nuxeo Live Edit is a Nuxeo extension that enables users to open and edit Microsoft Office and

OpenOffice.org documents in their native application from Nuxeo. This extension prevents you from the painful process of downloading - editing - uploading office documents in the application.

Depending on the local environment, one or several extensions are required. The Installing Live Edit page describes what is required for which configuration.
Live Edit is available for:

- MS Office 2007/2010 (standard and OOXML formats),
- OpenOffice.org 3.3+,
- LibreOffice 3.4.4+.

It is known to work with Internet Explorer 7+ and Firefox 3.6+.

> **Compatible environments**
> Live Edit can be used on Windows and Linux environments.

Live Edit allows you to:

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

On this page

Before You Start

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

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

Creating Office Documents

To create office documents directly into the Nuxeo Platform:

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:
    - 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.
6. Click on **OK** button.
   The document is automatically saved in Nuxeo.

Editing Documents

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

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

To edit office documents from the Nuxeo Platform:

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 Platform.

Installing Live Edit

Live Edit is available for:

- MS Office 2007/2010 (standard and OOXML formats),
- OpenOffice.org 3.3+,
- LibreOffice 3.4.4+.

It is known to work with Internet Explorer 7+ and Firefox 3.6+.

The table below summarizes the extensions and packages you need to install for each OS and browser.

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

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

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

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

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

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

You also need to configure IE 9 or the server so the `HTTP_ACCEPT` header is not truncated.

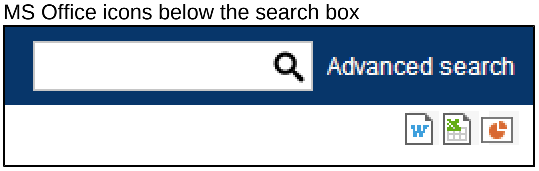
For Windows XP / MS Office 2003 32 bits users
You need to install the previous version of Live Edit (2.3.0) available from: http://download.nuxeo.org/desktop-integration/live-edit/nuxeo-liveedit-msoffice-ie-2.3.0.msi.
You also need to install the *Microsoft Visual Studio 2005 Tools for Office Runtime* available from: http://www.microsoft.com/download/en/details.aspx?displaylang=en&id=24263.

On this page

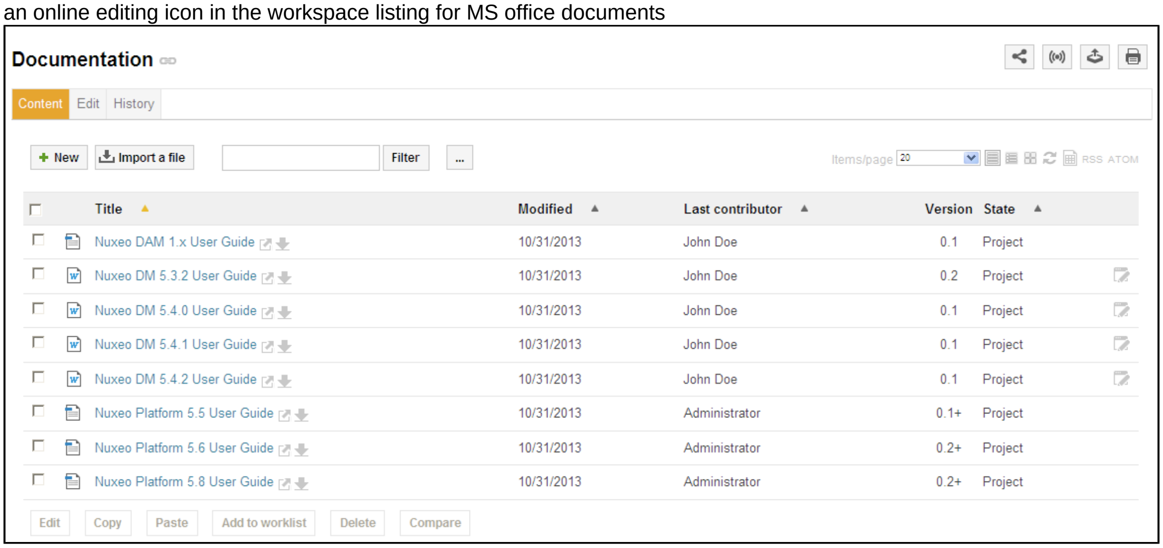
For MS Office and Internet Explorer users

To install Live Edit for MS Office:

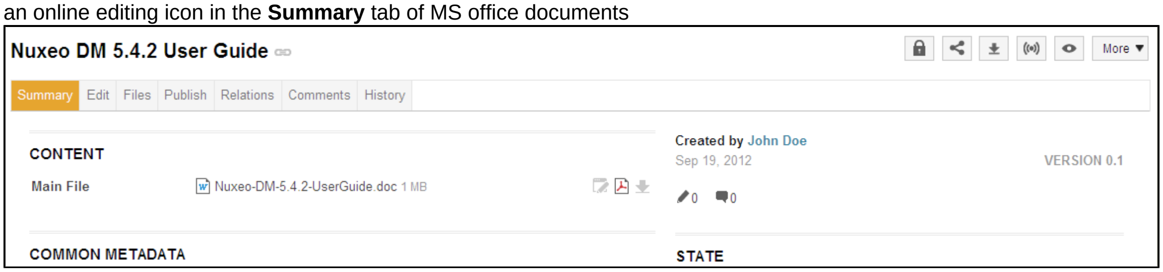
1. Run the Live Edit installer and follow the instructions.
2. If you are using Internet Explorer, close all windows and restart it.
3. Go on your Nuxeo application.
   You now have new icons displayed:
   - MS Office icons below the search box



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



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



   You can now edit documents online.

> **IE 9 compatibility**
> Internet Explorer 9 truncates the HTTP_ACCEPT header and prevents Live Edit from working. See the IE 9 Compatibility section for the required configuration.

> **Where is Live Edit installed?**

Live Edit 2.4.1 and older
Default installation of Live Edit is installed for all users:

- Windows Vista or 7: in `C:\Program Files (x86)\Nuxeo\Nuxeo Live Edit MsOffice`,
- Windows XP: `C:\Program Files\Nuxeo\Nuxeo Live Edit MsOffice`.

Live Edit 2.4.2+
From version 2.4.2 of Live Edit, it is possible to choose if Live Edit is installed for the current user or for users.Depending on this choice, Live Edit is installed at different locations:

- Installation for the current user (default installation): `C:\Users\MYUSER\AppData\Local\Apps\Nuxeo Live Edit MsOffice`.
- Installation for all users (from the Advanced installation menu):
  - Windows Vista or 7: `C:\Program Files (x86)\Nuxeo Live Edit MsOffice`,
  - Windows XP: `C:\Program Files\Nuxeo Live Edit MsOffice`.

For MS Office and Firefox users

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

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

Installing Live Edit for MS Office

You need to install Live Edit for Microsoft Office using the same installer as for MS Office and Internet Explorer: just run the installer and follow the instructions displayed.
At the end of this step, you won't see the online editing icons, because you need to install and configure the Firefox protocol handler.

Installing Firefox Protocol Handler

The Firefox Live Edit extension is a regular Firefox extension and gets installed the same way as any other extension on that browser.
To install it, click on the link to download it and follow the instructions displayed.
At this stage, you still won't see the online editing icons in the application. To see the icons and be able to edit documents, you need ton configure the protocol handler.

Configuring the Firefox protocol handler

To configure Live Edit Firefox Protocol Handler:

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

   When should you check the "Preserve compatibility" box
   Since version 0.4.6 of the protocol handler, there is a checkbox labeled "Preserve compatibility" that allows to preserve the backward compatibility.
   This box **must** be checked when the targeted server is pre 5.2.
   Without checking it, the add-on is forming a different type of headers allowing using of a bunch of new features like WebEngine (but it works only for the server 5.2 +). Simply 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`	Path to the file `nuxeo-liveedit-msoffice-launcher.exe`, in the directory where Live Edit has been installed. Default is: `C:\Users\MYUSER\AppData\Local\Apps\Nuxeo Live Edit MsOffice\nuxeo-liveedit-msoffice-launcher.exe`. Check the Installation for Internet Explorer and MS Office instructions to know where Live Edit is installed.	%s
.xls	`application/vnd.ms-excel`	Path to the file `nuxeo-liveedit-msoffice-launcher.exe`, in the directory where Live Edit has been installed. Default is: `C:\Users\MYUSER\AppData\Local\Apps\Nuxeo Live Edit MsOffice\nuxeo-liveedit-msoffice-launcher.exe`. Check the Installation for Internet Explorer and MS Office instructions to know where Live Edit is installed.	%s
.ppt	`application/vnd.ms-powerpoint`	Path to the file `nuxeo-liveedit-msoffice-launcher.exe`, in the directory where Live Edit has been installed. Default is: `C:\Users\MYUSER\AppData\Local\Apps\Nuxeo Live Edit MsOffice\nuxeo-liveedit-msoffice-launcher.exe`. Check the Installation for Internet Explorer and MS Office instructions to know where Live Edit is installed.	%s
.docx	`application/vnd.openxmlformats-officedocument.wordprocessingml.document`	Path to the file `nuxeo-liveedit-msoffice-launcher.exe`, in the directory where Live Edit has been installed. Default is: `C:\Users\MYUSER\AppData\Local\Apps\Nuxeo Live Edit MsOffice\nuxeo-liveedit-msoffice-launcher.exe`. Check the Installation for Internet Explorer and MS Office instructions to know where Live Edit is installed.	%s
.xlsx	`application/vnd.openxmlformats-officedocument.spreadsheetml.sheet`	Path to the file `nuxeo-liveedit-msoffice-launcher.exe`, in the directory where Live Edit has been installed. Default is: `C:\Users\MYUSER\AppData\Local\Apps\Nuxeo Live Edit MsOffice\nuxeo-liveedit-msoffice-launcher.exe`. Check the Installation for Internet Explorer and MS Office instructions to know where Live Edit is installed.	%s

.pptx	`application/vnd.openxmlformats-officedocument.presentationml.presentation`	Path to the file `nuxeo-liveedit-msoffice-launcher.exe`, in the directory where Live Edit has been installed. Default is: `C:\Users\MYUSER\AppData\Local\Apps\Nuxeo Live Edit MsOffice\nuxeo-liveedit-msoffice-launcher.exe`. Check the Installation for Internet Explorer and MS Office instructions to know where Live Edit is installed.	%s

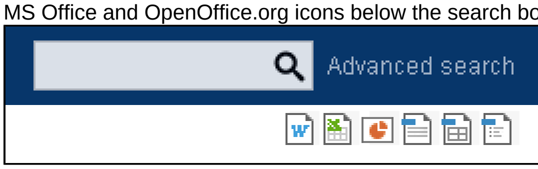
For OpenOffice.org and Internet Explorer users

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

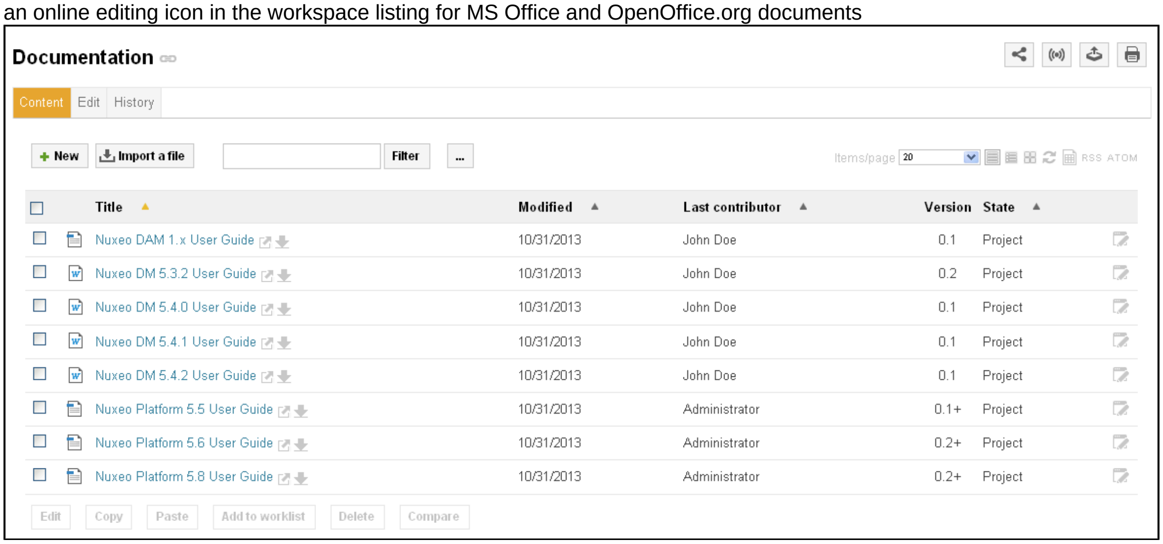
1. install the MS Office - IE Live Edit (see Installing Live Edit for MS Office),
2. install the OpenOffice.org - IE Live Edit extension (see below).

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

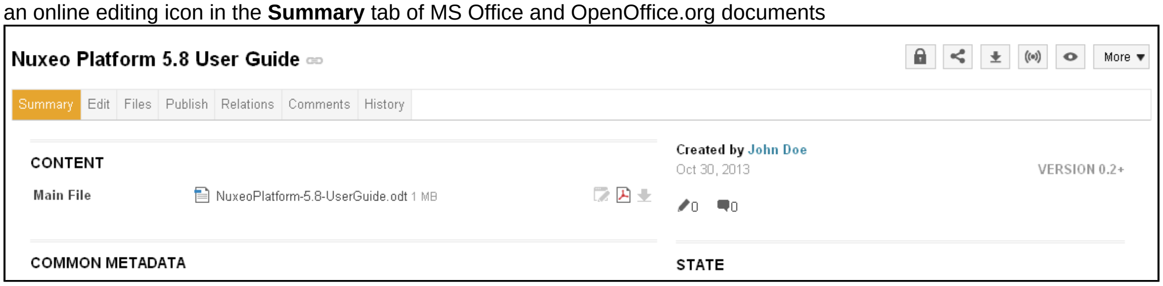
1. Run the OpenOffice.org - IE Live Edit installer (.exe) and follow the instructions displayed.
2. Restart Internet Explorer if you have windows open.
3. Go on your Nuxeo application.
   You now have new icons displayed:
   - MS Office and OpenOffice.org icons below the search box



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



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



You can now edit documents online.

IE 9 compatibility
Internet Explorer 9 truncates the `HTTP_ACCEPT` header and prevents Live Edit from working. See the IE 9 Compatibility section for the required configuration.

For OpenOffice.org and Firefox users

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

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

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

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. It works on LibreOffice.

> **Java requirement**
> - The Live Edit extension for OpenOffice and Libre Office requires Java support in OpenOffice / LibreOffice. This is included in most of distributions, but on some Linux distributions you may need to install `openoffice-java-common` or `libreoffice-java-common` for the extension installation to work.
> - On 64bits operating systems, make sure that OpenOffice/LibreOffice is configured to use a 32bits Java Runtime Environment (Open an OpenOffice/LibreOffice window and go to **Tools** > **LibreOffice** or **OpenOffice** > **Advanced**).

Then you need to install and configure the Firefox extension.

Installing Firefox Protocol Handler

The Firefox Live Edit extension is a regular Firefox extension and gets installed the same way as any other extension on that browser.
To install it, click on the link to download it and follow the instructions displayed.
At this stage, you still won't see the online editing icons in the application. To see the icons and be able to edit documents, you need ton configure the protocol handler.

Configuring the Firefox protocol handler

To configure Live Edit Firefox Protocol Handler:

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

   > **When should you check the "Preserve compatibility" box**
   > 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 +). Simply 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 or LibreOffice

File extension	Mimetype	Editor command	Editor command arguments
.doc	`application/msword`	Path to the OpenOffice.org or LibreOffice `soffice.exe` file, for instance `C:\Program Files\OpenOffice.org 3\program\soffice.exe` or `C:\Program Files (x86)\LibreOffice 3.4\program\soffice.exe`	`macro:///LiveEditOOo.launcher.load(%s)`

.xls	application/vnd.ms-excel	Path to the OpenOffice.org or LibreOffice soffice.exe file, for instance C:\Program Files\OpenOffice.org 3\program\soffice.exe or C:\Program Files (x86)\LibreOffice 3.4\program\soffice.exe	macro:///LiveEditOOo.launcher.load(%s)
.odt	application/vnd.oasis.opendocument.text	Path to the OpenOffice.org or LibreOffice soffice.exe file, for instance C:\Program Files\OpenOffice.org 3\program\soffice.exe or C:\Program Files (x86)\LibreOffice 3.4\program\soffice.exe	macro:///LiveEditOOo.launcher.load(%s)
.ods	application/vnd.oasis.opendocument.spreadsheet	Path to the OpenOffice.org or LibreOffice soffice.exe file, for instance C:\Program Files\OpenOffice.org 3\program\soffice.exe or C:\Program Files (x86)\LibreOffice 3.4\program\soffice.exe	macro:///LiveEditOOo.launcher.load(%s)
.odp	application/vnd.oasis.opendocument.presentation	Path to the OpenOffice.org or LibreOffice soffice.exe file, for instance C:\Program Files\OpenOffice.org 3\program\soffice.exe or C:\Program Files (x86)\LibreOffice 3.4\program\soffice.exe	macro:///LiveEditOOo.launcher.load(%s)

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

For Google Chrome users under MS Windows

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

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

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

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

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

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

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

needed).
3. Restart the Nuxeo server.

Working with an untrusted certificate

When working with an untrusted certificate, make sure to register it as a trusted one, or you'll encounter a `System.Security.Authentication.AuthenticationException` exception.

Following this link below, you'll figure out useful information:

Manage Trusted Root Certificates - Microsoft Library

Live Edit Compatibility Table

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

Tested versions of Live Edit are:

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

On this page

Internet Explorer 9 Compatibility

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

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

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

Two workarounds are possible:

- If you want to use Live Edit with the client side detection in Internet Explorer 9, you need to activate the "Internet Explorer 9 Compatibility view" browsing mode (F12 developer tools).
  With IE 9 in compatibility mode, the `HTTP_ACCEPT` header is:

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

- Or you can force the detection of the Live Edit installation with a server side configuration:
  1. Edit `$NUXEO_HOME/templates/common/config/nuxeo.properties`.
  2. Change the value for the property `org.nuxeo.ecm.platform.liveedit.config` from **client** to **server** (uncomment the line if needed).
  3. Restart the Nuxeo server.

Windows XP Environment

	Internet Explorer 6	Internet Explorer 7	Internet Explorer 8	Internet Explorer 9	Firefox < 3.6	Firefox 3.6.3	Firefox 4+
Microsoft Office 2000	Not supported	Not supported anymore	Not supported anymore	N/A	Not supported anymore	Not supported anymore	Not supported anymore
Microsoft Office XP	Not supported	Not supported anymore	Not supported anymore	N/A	Not supported anymore	Not supported anymore	Not supported anymore

Microsoft Office 2003	Not supported	OK, except for a minor issue: LIVED-187	OK, except for a minor issue: LIVED-187	N/A	Not supported anymore	OK, except for a minor issue: LIVED-187	Testing in progress
Microsoft Office 2007	Not supported	Tested OK on development branch, but minor issues: ~~LIVED-163~~ ~~LIVED-164~~ ~~LIVED-165~~ Tests on Live Edit 2.2.1 in progress	Testing in progress	N/A	Not supported anymore	Tested OK on development branch, but minor issues: ~~LIVED-163~~ ~~LIVED-164~~ ~~LIVED-165~~ Tests on Live Edit 2.2.1 in progress	Testing in progress
OpenOffice.org 3.3	Not supported	OK	OK	N/A	Not supported anymore	OK	Testing in progress
LibreOffice 3.4	Not supported	OK	OK	N/A	Not supported anymore	OK	Testing in progress

Windows 7 64b Environment

Nuxeo LiveEdit Microsoft Office is only compatible with Office in 32 bits.
Beware about its detection inside Internet Explorer. For the moment, out of the box, it will only be possible with the 32 bits version of your browser.

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

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

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

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

Windows 7 32b Environment

	Internet Explorer 6	**Internet Explorer 7**	**Internet Explorer 8**	**Internet Explorer 9**	**Firefox < 3.6**	**Firefox 3.6.x**	**Firefox 4+**
Microsoft Office 2000	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Microsoft Office XP	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Microsoft Office 2003	N/A	N/A	Not supported	Note supported	Not supported	Not supported	Not supported

Microsoft Office 2007	N/A	N/A	Testing in progress	Testing in progress	Not supported anymore	Testing in progress	Testing in progress
Microsoft Office 2010	N/A	N/A	OK	Testing in progress	Not supported anymore	Testing in progress	Testing in progress
OpenOffice.org 3.3	N/A	N/A	Testing in progress	Testing in progress	Not supported anymore	Testing in progress	Testing in progress
LibreOffice 3.4	N/A	N/A	Testing in progress	Testing in progress	Not supported anymore	Testing in progress	Testing in progress

Managing Your Own File with LiveEdit

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

On this page

With Internet Explorer

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

In a .reg file, a new handled extension should looks like:
"liveedit_msoffice12_word_template"="application/x-nuxeo-liveedit;ext7=\"vnd.ms-word.template.macroEnabled.12\"".

The key is a unique name, and in this example, it is "liveedit_msoffice12_word_template".
The value is built like a MIME-TYPE: application/x-nuxeo-liveedit;extX="*FILE_MIME_TYPE*". In this example, the value is: "application/x-nuxeo-liveedit;ext7="vnd.ms-word.template.macroEnabled.12".

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

Restart required
Do not forget to restart your browser after making changes.

See the attached file to enable all Microsoft Office extensions.

With Firefox

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

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

Working with WebDAV and WSS

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

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

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

Nuxeo Drive
There are several known limitations with using WebDAV protocol on Windows machines to connect to the Nuxeo Platform: temporary files that are stored in the Nuxeo Platform, technical name displayed instead of title of the document. We hardly recommend to mount WebDAV drives on Windows machines but for some specific use cases. The behavior can be different depending on the version of Windows, the version of service pack, etc.

We recommend you to pay attention to Nuxeo Drive that can offer you a file system access style without the above mentioned drawbacks.

Adding Nuxeo as an External Drive

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

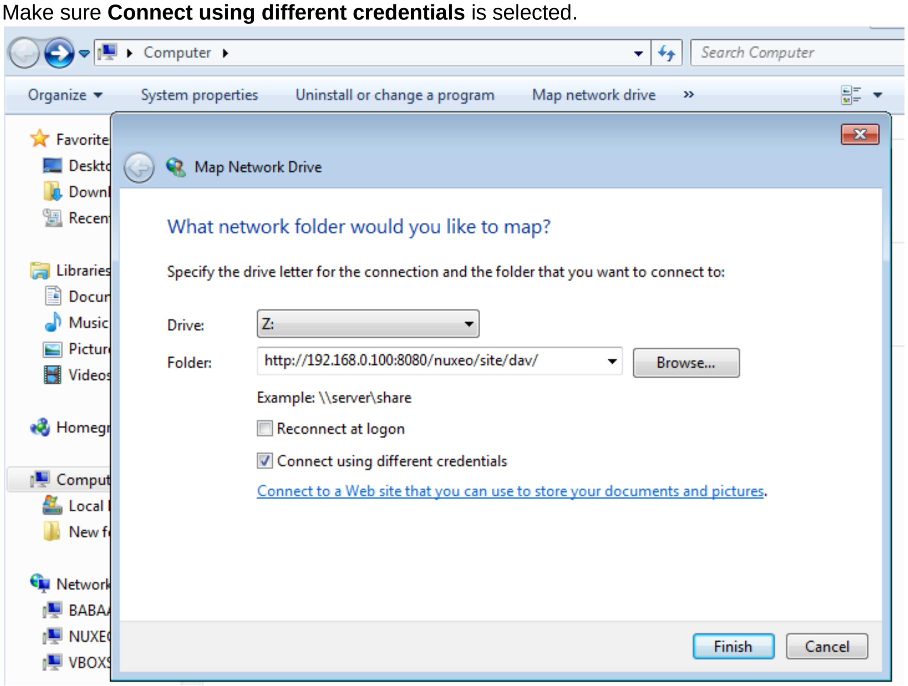
Requirement
The first time you do the mapping, make sure that you have already logged in to the web interface once. This is required to setup the Windows authentication protocol.

Adding a New Network Place from Windows XP

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

Mapping a Network Drive from Windows 7 Explorer

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



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

Connecting to Nuxeo from Mac OS Finder

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

Connecting to Nuxeo from Linux

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

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

It is possible to configure the application to work with other WebDAV clients.

Browsing Nuxeo from Your OS

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

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

Editing Documents

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

Creating Content in Nuxeo

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

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

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

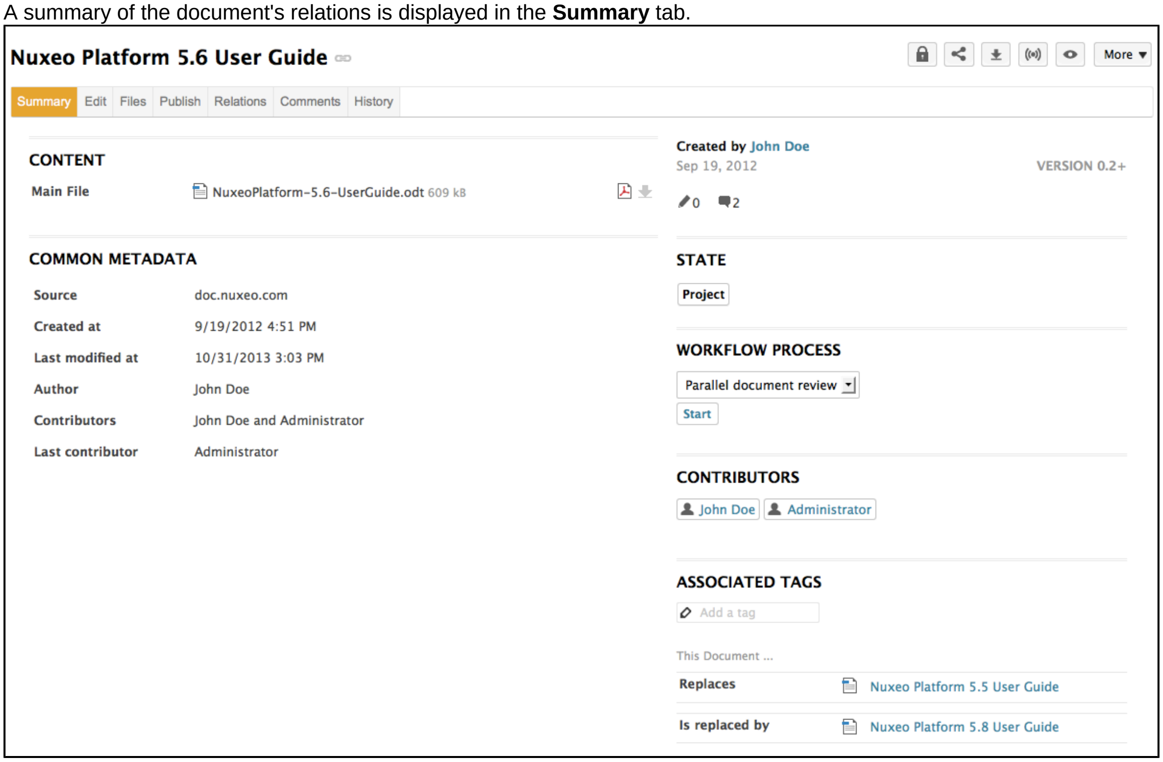
On this page

Related Documentation
• WebDAV

Relations

Relations are information 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).

Adding a Relation

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

You can create a relation from a document to:

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

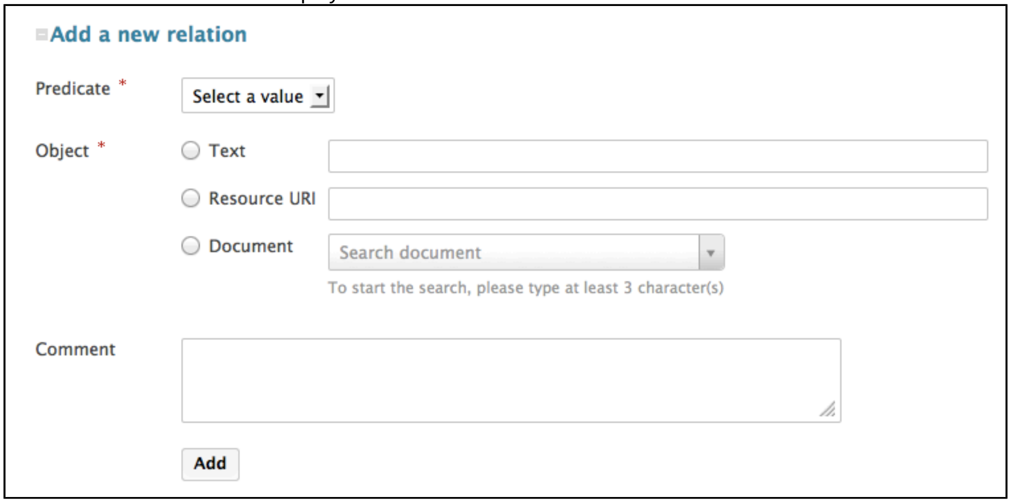
You can create relations between documents from different workspaces or domains.

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

To create a relation:

1. Click on the **Relations** tab of the document.
2. Click on the **Add a new relation** link.

The relation creation form is displayed under the link.



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 Platform 5.6 User Guide	11/3/2013 1:56 PM	jdoe	Updated for 5.8 release	Delete

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

Incoming relations

Predicate	Object	Creation	Author	Comment
Is replaced by	Nuxeo Platform 5.8 User Guide	11/3/2013 2:00 PM	jdoe	Updated for 5.8 release

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

Deleting a Relation

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

You can delete outgoing relations only.

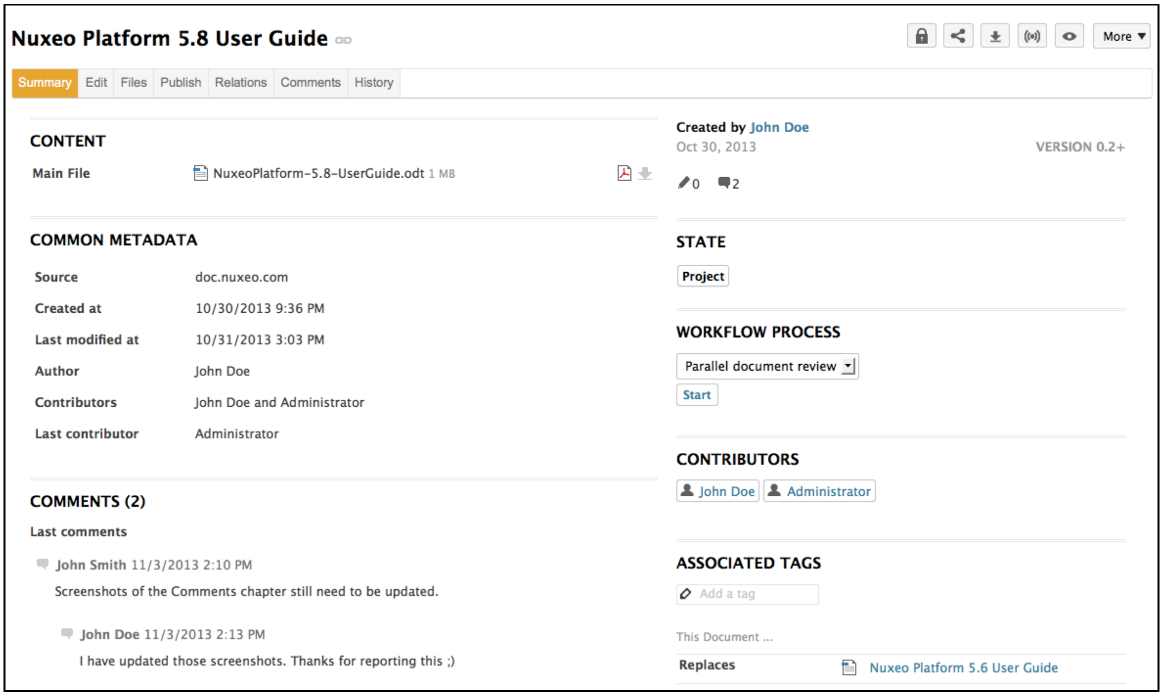
To delete a relation:

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

Comments

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

The last comments added on the document are displayed on the **Summary** tab of the document.



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

All users can see the comments added on a document.

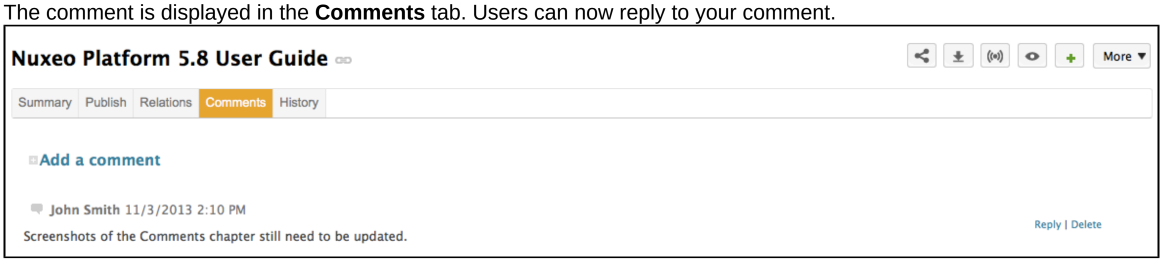
Adding a Comment on a Document

You need reading rights to add comments on documents.

To add a comment on a document:

1. Click on the **Comments** tab of the document.
2. Click on the **Add a comment** link.
   A form to add a comment is displayed.

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.



Replying to a Comment

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

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

To reply to a comment:

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

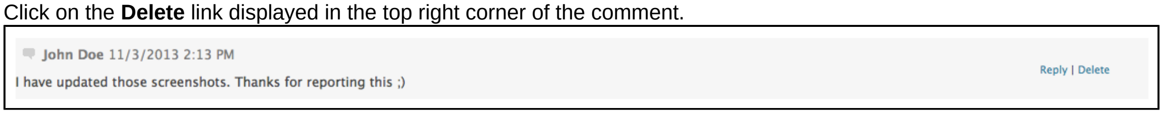
2. Type your comment in the text area.
3. Click on the **Add** button.
   The answer is inserted after the comment it replies to.
   

Deleting Comments

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

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

To delete a comment:

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

   The comment is immediately erased.

Related topics

- Commenting Assets

Annotations and Preview

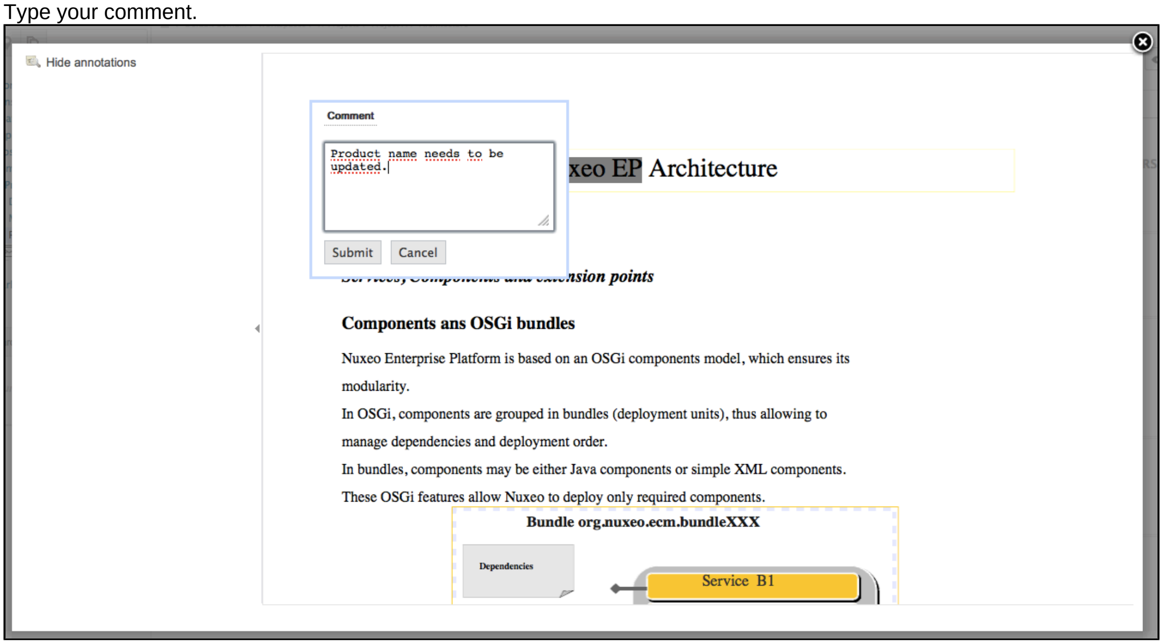
Annotations are post-its or comments placed on the preview of documents.
You can annotate documents as soon as you can access them, i.e. when you have at least "Read" right.

Annotations and preview are available on the Document Management module of the Nuxeo Platform.

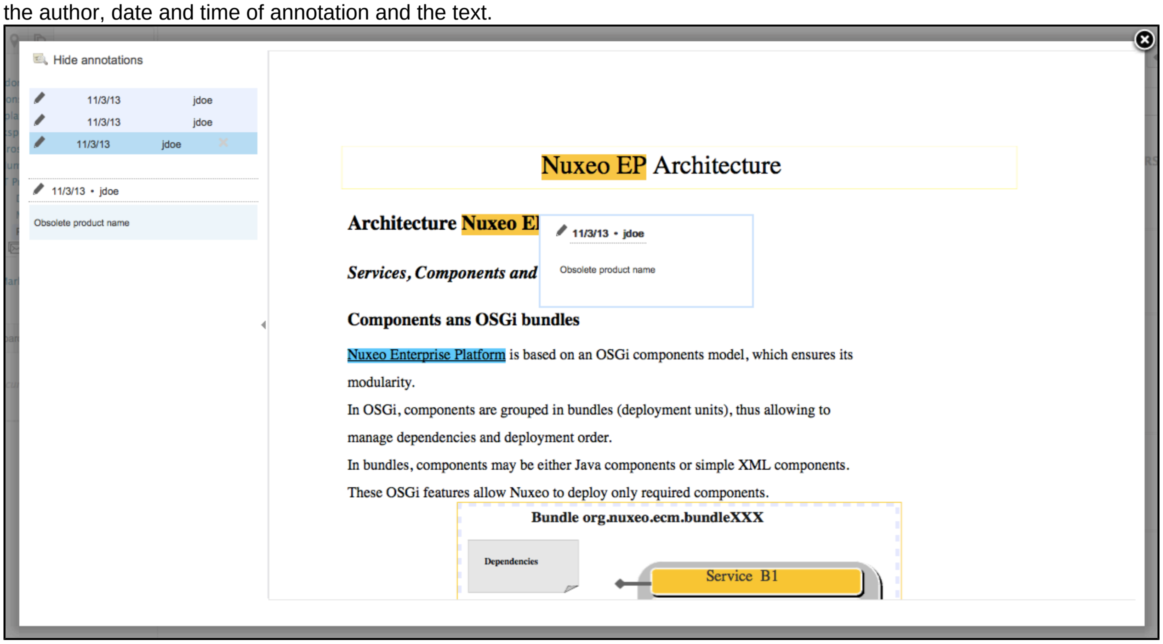
Annotating a Document

To annotate a document:

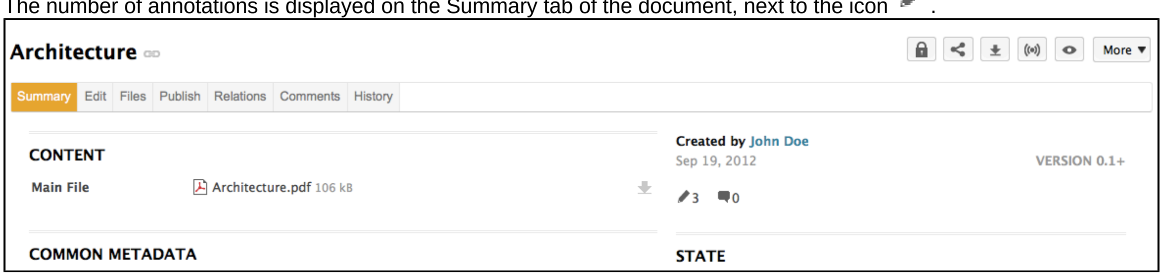
1. Click on the icon of the document.
   The document's preview is displayed in a pop up window.
2. Draw a frame on the preview.
   An input pop up appears.
3. Type your comment.



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.



The number of annotations is displayed on the Summary tab of the document, next to the icon .



Supported Formats

The installation of third-party software is required for some formats of the list below.

File format	Preview supported
.doc	Yes
.docx	Yes
.html	Yes
.jpg	Yes
.odp	Yes
.ods	Yes
.odt	Yes
.pdf	Yes
.png	Yes
.ppt	Yes
.pptx	Yes
.psd	No
.tiff	Yes
.xls	Yes
.xlsx	Yes
.xml	No

On this page

Tags

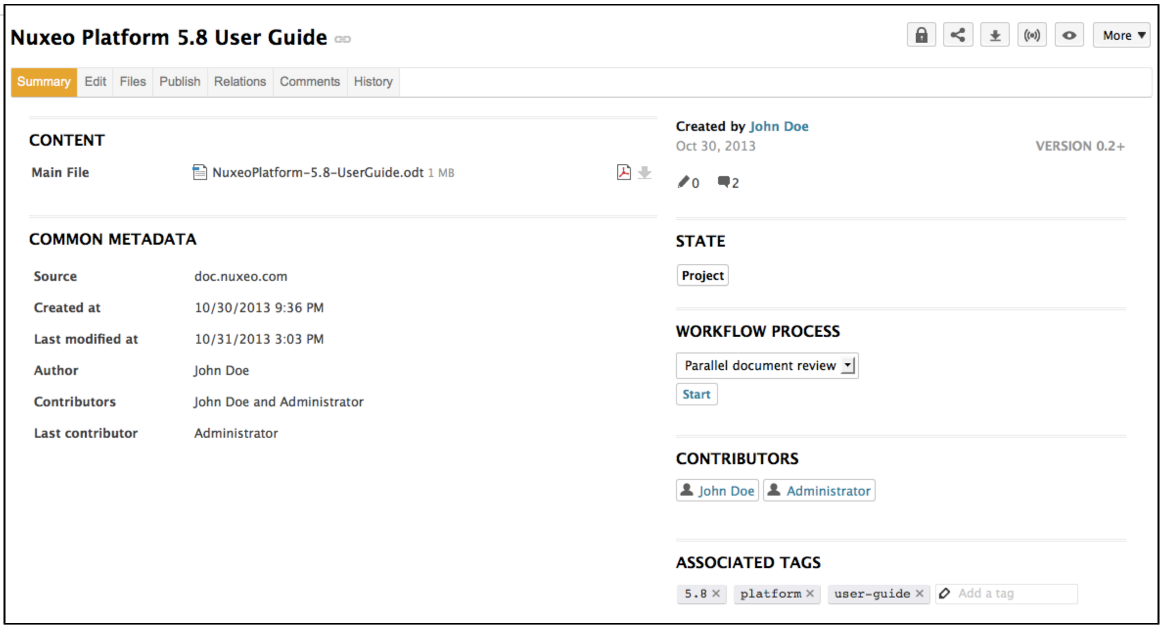
Tags are labels that you can add on documents to help you describe them.

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.

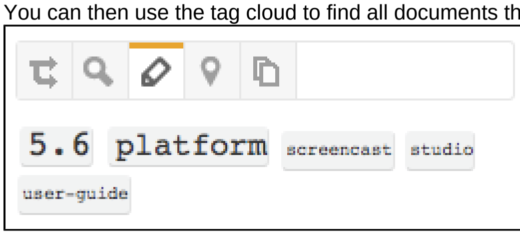
Tags are available on the Document Management module of the Nuxeo Platform.

On this page

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.



Tags, Versions and Publication

When you save a document as a new version, the tags that user have put on the document are saved with the version. This means that the archived versions of a document and the document in its current version can have different tags. If you restore a previous version of the document, tags are restored with it and replace the tags from the replaced version.

When you publish a document, the tags are copied from the work document to the published document. You can then remove useless tags from either version of the document (work version or published version) without affecting the other one. In case of republication of the document, the tags from the previously published version and the newly published version are merged so you don't loose any previous or preparatory categorization.

Tagging Documents

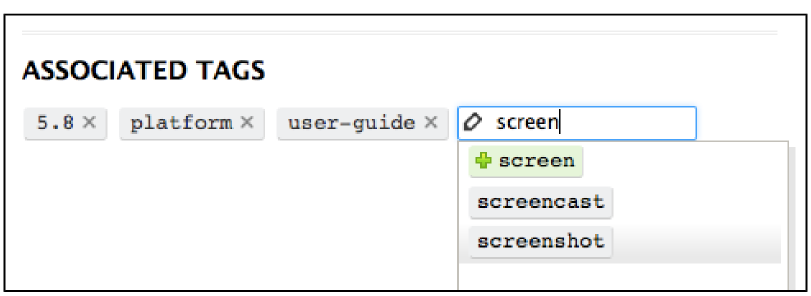
Users can add a tag on a document as soon as they can access the document, ie as soon as they have reading rights.

Documents can be tagged in workspaces and in sections. When a document is published, the tags applied in the workspaces are published with the document.

To tag a document:

1. Go on the **Summary** tab of the document.
   Type a label in the **Tags** text field.

   Tags already used are proposed from 3 letters typed.

2. Click on the suggested label to add an existing tag or on the tag prefixed with the icon to create and add a new one.
   The tag is immediately added on the document and available in the tag cloud.

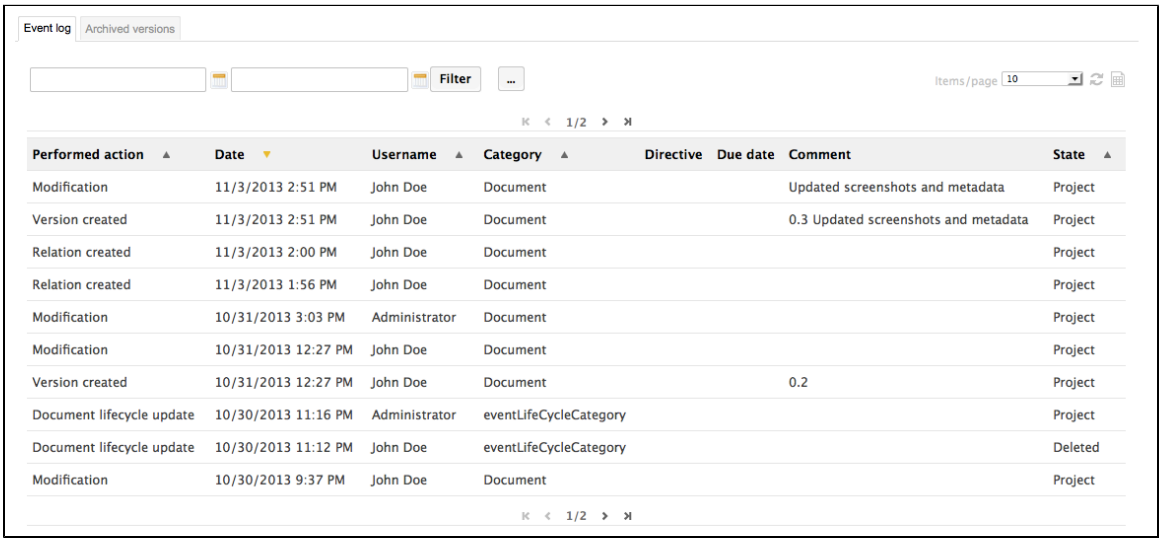
Removing Tags

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

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

Document's History

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



Performed action	Date	Username	Category	Directive	Due date	Comment	State
Modification	11/3/2013 2:51 PM	John Doe	Document			Updated screenshots and metadata	Project
Version created	11/3/2013 2:51 PM	John Doe	Document			0.3 Updated screenshots and metadata	Project
Relation created	11/3/2013 2:00 PM	John Doe	Document				Project
Relation created	11/3/2013 1:56 PM	John Doe	Document				Project
Modification	10/31/2013 3:03 PM	Administrator	Document				Project
Modification	10/31/2013 12:27 PM	John Doe	Document				Project
Version created	10/31/2013 12:27 PM	John Doe	Document			0.2	Project
Document lifecycle update	10/30/2013 11:16 PM	Administrator	eventLifeCycleCategory				Project
Document lifecycle update	10/30/2013 11:12 PM	John Doe	eventLifeCycleCategory				Deleted
Modification	10/30/2013 9:37 PM	John Doe	Document				Project

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

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

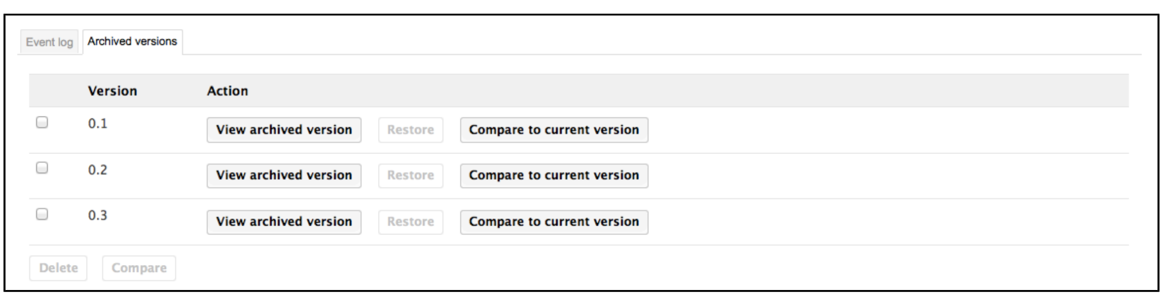
On this page

Viewing a Previous Version of a Document

All users can consult the previous versions of a document.

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

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



	Version	Action
☐	0.1	View archived version · Restore · Compare to current version
☐	0.2	View archived version · Restore · Compare to current version
☐	0.3	View archived version · Restore · Compare to current version

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

Version number 0.0
Draft version 0.0 is not archived. See the page Editing Content for more information about versioning.

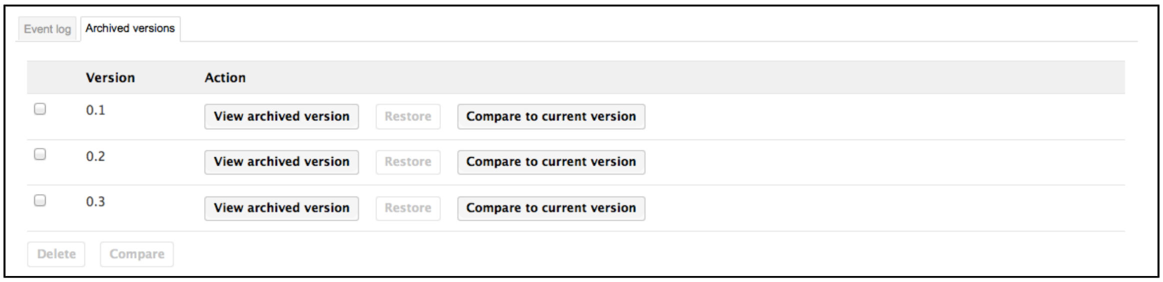
Archived versions have few actions available: you can only create relations from it to another document, annotate it and subscribe to notifications.

Restoring an Older Version of a Document

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

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

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



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

Deleting a Older Version of a Document

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

Version deletion is a permanent action.

To delete an archived version:

1. Check the box corresponding to the version you want to delete.
2. Click on the **Delete** button below the version list.
   A confirmation window pops up.
3. Click on the **OK** button to confirm.
   The version is permanently deleted.

Alerts

Alerts are emails automatically sent to users when an event occurs in a space. Users can follow the activity of a document or a space, which means that they will receive an alert when an event occurs on the document or space. Spaces' managers can subscribe users to alerts.

When users follow a document or a space activity, they get an email when the events below happen:

- Creation: users get an email when some content is created in the space;
- Modification: users receive an email every time the space or its content is edited;
- Workflow changed: users receive an email for each action that happens during a review (start, abandon, document approval, document rejection);
- Approval workflow started: users receive an email every time an approval workflow is started;
- Comments moderation: users receive an email when a comment is approved on a site.
- Publish: users receive an email when a document is published in the specified section.

The publish event is available in sections only. The other events are available in workspaces only.

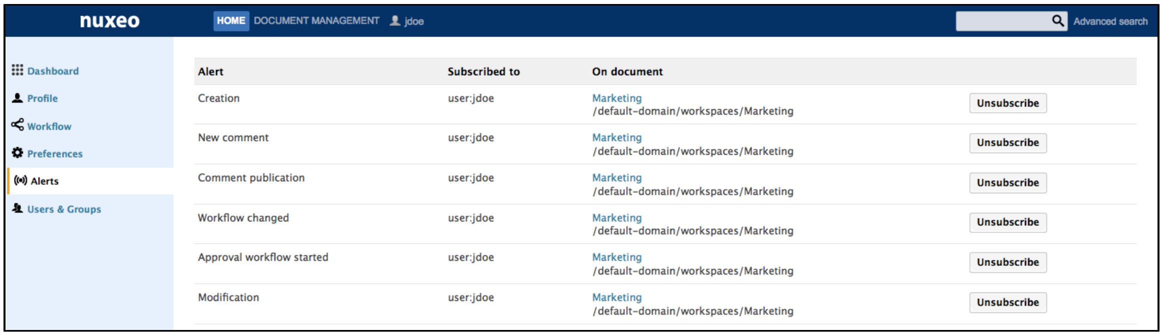
On this page

Following a Document or the Activity of a Space

You need to have at least reading rights to follow a document or a space.

To follow a document or a space activity:

From the document or space, click on the icon .
The icon becomes green to indicate that you follow the document and, from now on, you will receive an email every time an event occurs on the document.
On the Home **Alerts** tab, the user can see all the events he will be alerted of and the associated documents.



Unfollowing a Document or the Activity of a Space

You need to have at least reading rights to unfollow a document or a space. You can either unfollow the document and don't receive any email anymore, or you can unsubscribe from some events only.

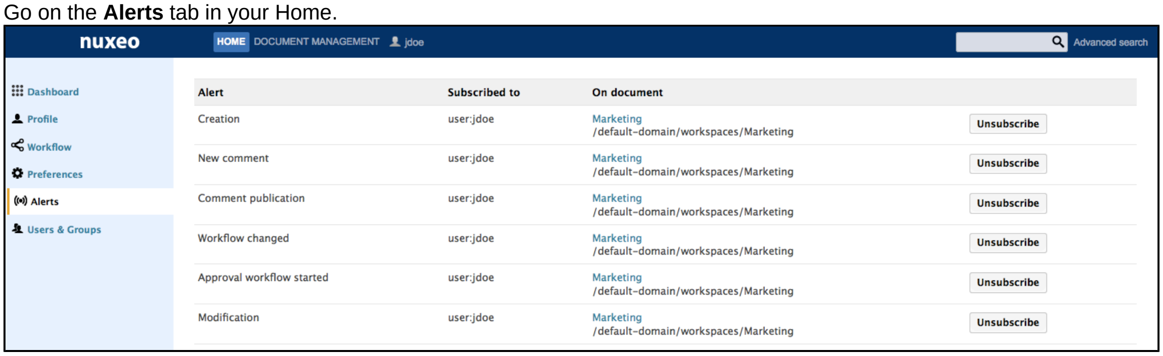
> You cannot unfollow a document when your group was subscribed to alerts on it.

To unfollow a document or a space activity:

From the document or space, click on the icon .
The icon becomes grey to indicate that you don't follow the document and you won't receive emails anymore when events occur on the document.
On the Home **Alerts** tab, no event is associated to the document anymore.

To unsubscribe from an event:

1. Go on the **Alerts** tab in your Home.



2. Click on the **Unsubscribe** button corresponding to the event you want to unsubscribe from.
   The event is removed from the list. You won't receive emails when this event occurs on the document or space.

Managing Subscriptions

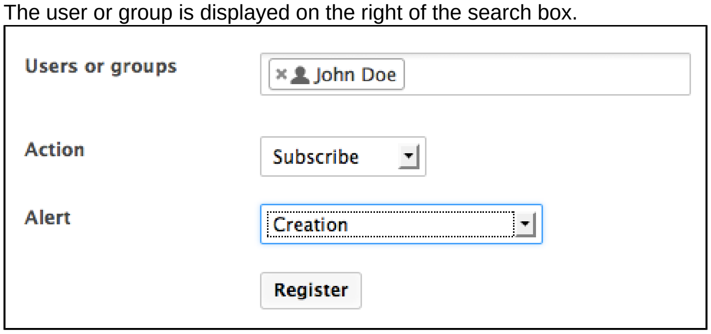
Only users with management rights can manage the users' alerts.

Users with management rights can see the documents the users follow. They can also subscribe users or groups to alerts or unsubscribe them.

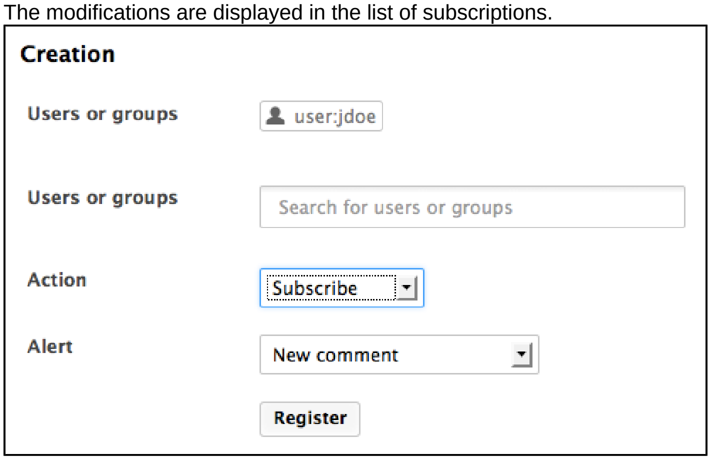
To manage subscriptions:

1. In the space, click on the **Manage** tab.
2. Click on the **Alerts** 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.

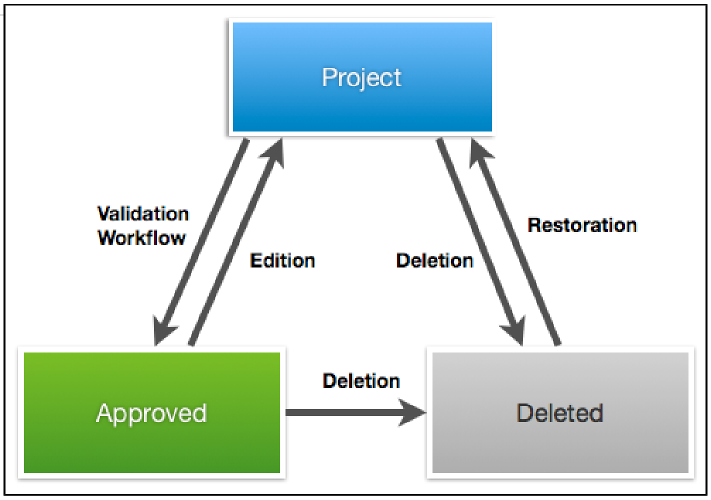


5. Select the action you want to do (**Subscribe** or **Unsubscribe**) and the notification concerned.
6. Click on the **Register** button.
   The modifications are displayed in the list of subscriptions.



Workflows

All the documents evolve according to a defined life cycle. The default life cycle is composed of the following states: Project, Approved, Obsolete and Deleted. There are different ways to make documents evolve through this life cycle. One of the ways is to use a workflow.



A workflow is a process in which a chain of users is defined to review, approve or reject the document. Workflows are traditionally used to validate documents (make them go to "Approved" state), but they can also be used to have the document reviewed, without life cycle state change.

The Nuxeo Platform includes two default workflows: one serial workflow and one parallel workflow. Other workflows can be configured with Nuxeo Studio, which will then be available in the application.

The default serial workflow, called "Serial document review", is an ordered workflow. This means that participants can review the document only when the previous participant in the list has approved the document. It can be used either to approve the document or simply to review it.

The default parallel workflow, called "Parallel document review", is an unordered workflow that enables to change the document's state after a consultation step. This means that participants can give their opinion on the document without having to wait for a previous participant to approve it.

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.

Serial Document Workflow

The default serial workflow, called "Serial document review", is an ordered workflow. This means that participants can review the document only when the previous participant in the list has approved the document. It can be used either to approve the document or simply to review it.

The workflow is composed of the steps below:

1. A user decides to start a review on a document and wants several other users to participate one after the other. He executes a Serial document review.
2. He selects who will participate to the review and if the document should go the Approved life cycle state at the end of the workflow. He can then start the workflow.
3. Participants gets the document one after the other to approve or reject it:
   - If the participant approves the document, the next participant gets a task to review the document.
   - If the participant rejects the document, the document goes back to the previous reviewer.
4. When the last participant approves the document, the workflow automatically stops and, in case of an approval review, the document goes the Approved life cycle state.

The pages below describe how to proceed for the different steps:

- Starting a Serial Workflow
- Participating to a Serial Workflow

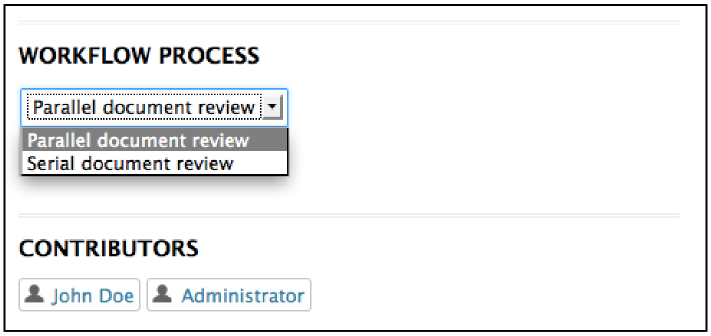
Starting a Serial Workflow

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

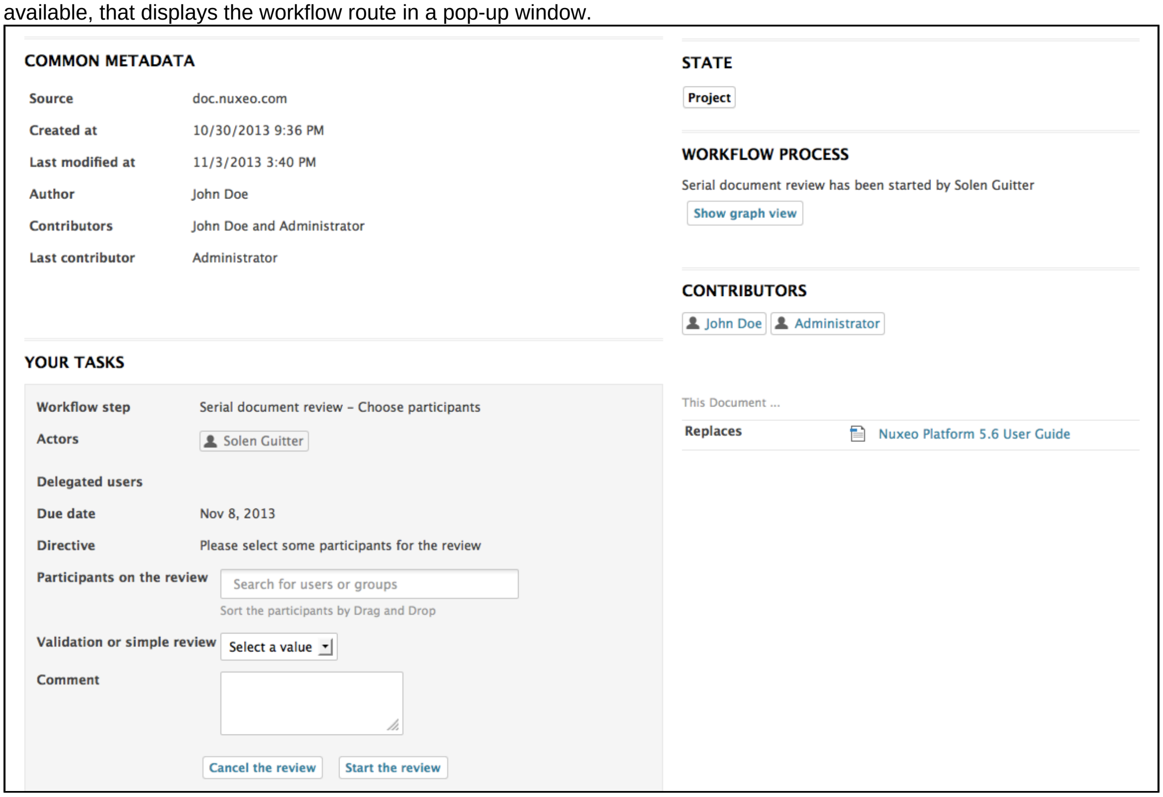
To start a workflow, you need to select the workflow type, reviewers and review type.

To start a workflow:

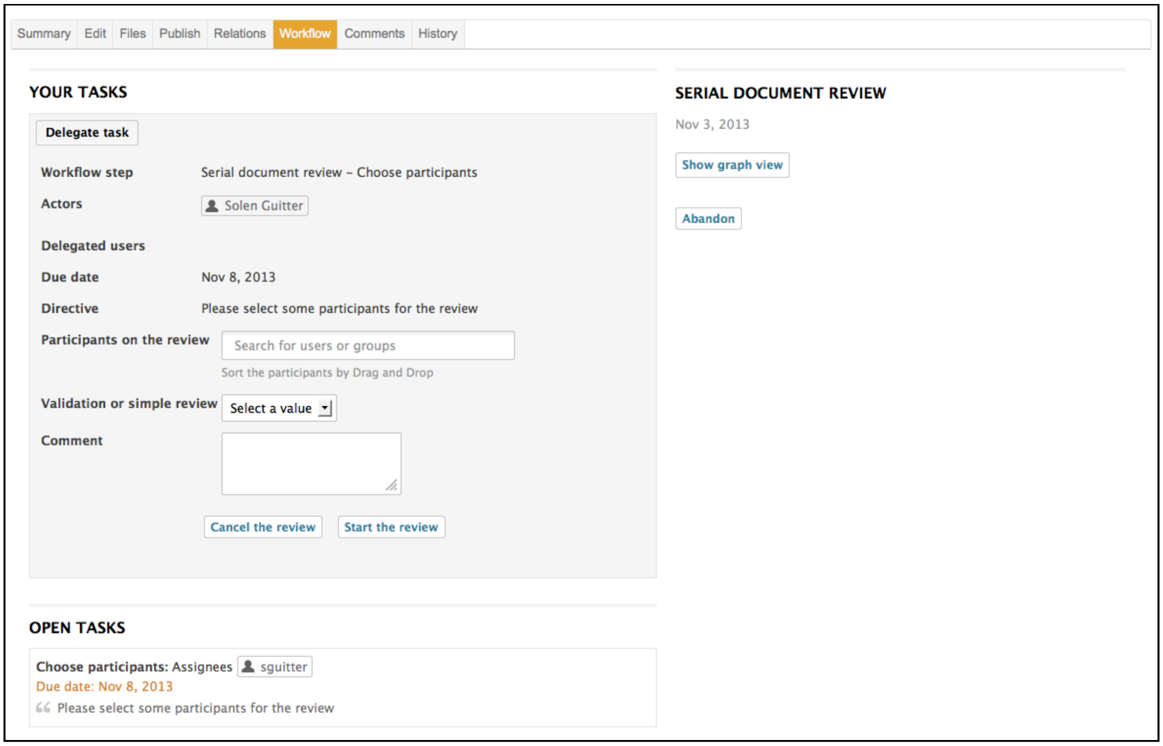
1. On the **Summary** tab, in the **Workflow process** section, select the workflow type you want to start and click on the **Start** button.



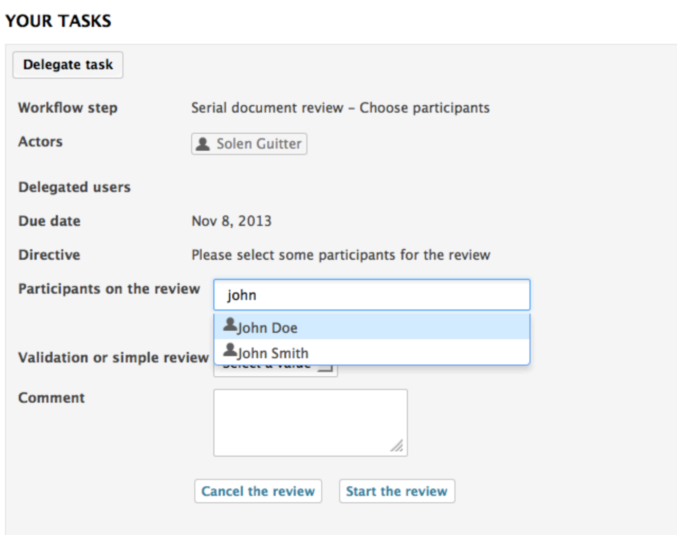
The form to select the reviewers and start the workflow is displayed on the **Summary** tab. A **Show graph view** button is also available, that displays the workflow route in a pop-up window.



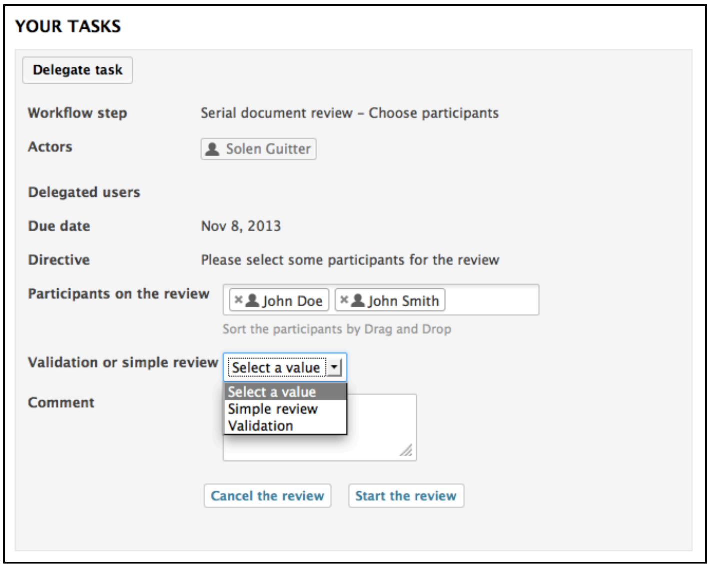
A **Workflow** tab is now available on the document from which you can select the reviewers, delegate your task, show the graph view but also see the current and previous tasks and abandon the workflow.



2. Add users on the workflow:
    a. In the **Participants on the review** field, type the name of a user or a group.
       The users and groups corresponding to the letters typed are displayed.



    b. Click on the user you want to add on the workflow.
    c. Repeat these two steps to add all the participants to the review.
    d. Optionally, drag and drop the participants to change their order on the workflow, or the icon ✖ to remove them.
3. Select the type of review you want to do:
    - Simple review: the document's state will not change.
    - Validation review: when all the reviewers have approved the document, it goes to the **Approved** life cycle state.



4. Type a comment, indicating the purpose of the review for instance.
5. Click on the **Start the review** button to let participants approve or reject the document.
   Only the **Show graph view** button remains on the **Summary** tab.
   On the **Workflow** tab, the current task and the previous ones are displayed.

   The first participant(s) on the review get(s) an email and have his (their) task displayed on his (their) dashboard.

Related Documentation

- Participating to a Serial Workflow
- Workflows user documentation
- Workflow in Nuxeo Studio

Participating to a Serial Workflow

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

When they have a task on a document, users are displayed it on their dashboard in the "My tasks" gadget and in their home Workflow tab. They also receive an email to inform them that they were assigned a task on a document:

> A task on the document Document_Title was assigned to you or to a group you belong to. You can consult the document following this link: Document_Title

The participants of a workflow can:

- Edit the document: access rights to the document are temporarily modified by the system to enable the reviewers to edit the document if their rights didn't allow them to;
- Approve the document;
- Reject the document.

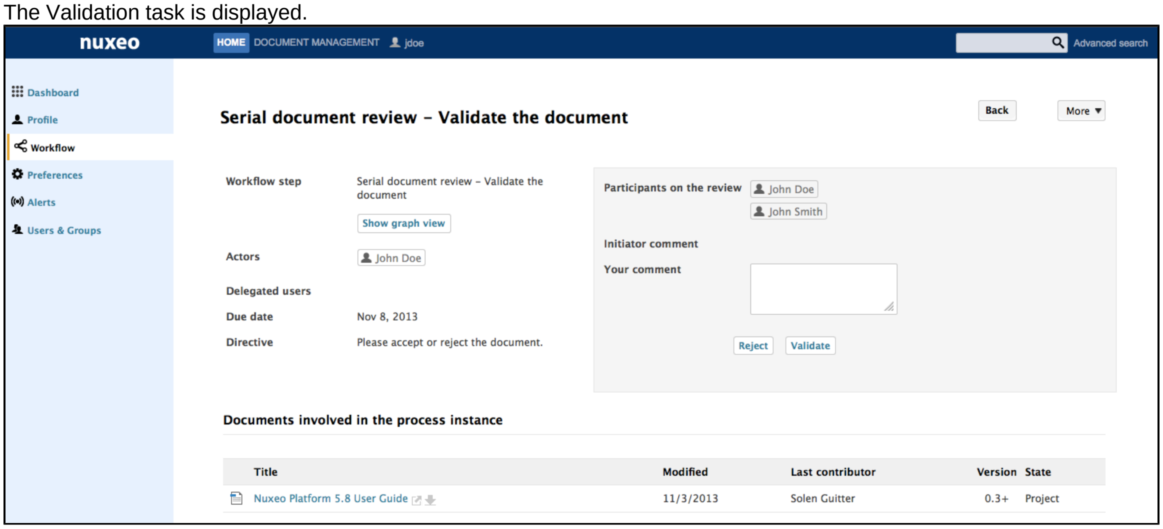
On this page

Approving a Document

Participants can approve the document when it's their turn, after the previous participant on the workflow has approved it. Participants automatically get Write right on the document for the time they have a task to perform on the document, if they had Read permission or no access to the document.

To approve the document:

1. In your **Home**, click on the **Workflow** tab.
   The list of tasks you have to do is displayed.
2. Optionally click on the icon to open the document in a new tab, consult it and edit it.
3. From the **Workflow** tab, click on the **Process** button.
   The Validation task is displayed.



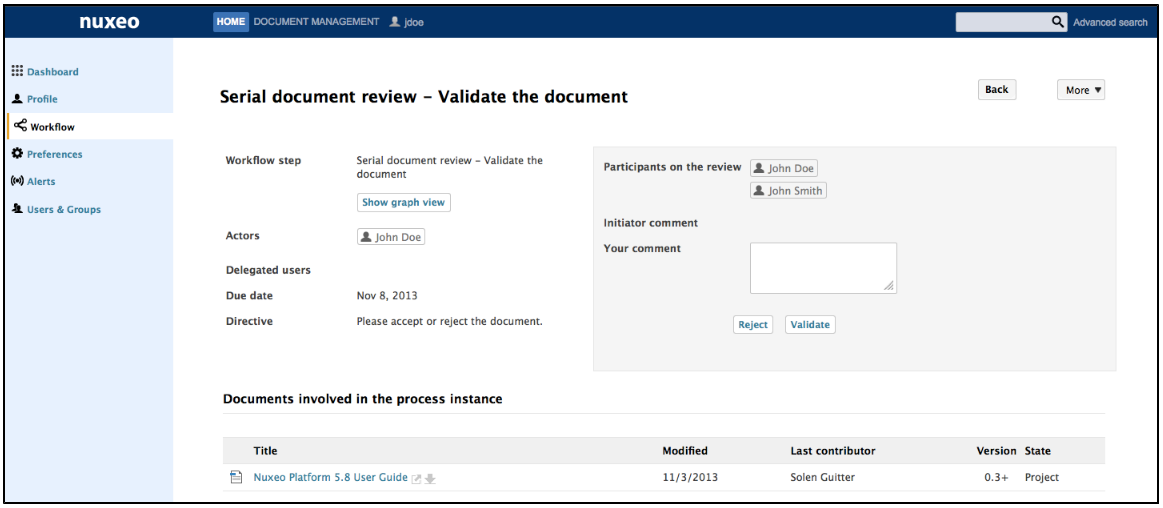
4. If you think that you won't be able to process the task, delegate it to another user. If not switch to the next step.
5. Optionally, type a comment to indicate what you did on the document before approving it.
6. Click on the **Validate** button.
   The task is not displayed anymore from the Workflow tab and the document. If you originally had read-only access to the document, you can't edit it anymore.
   The next participant can now review the document and approve or reject it.

Rejecting a Document

Participants can reject the document when it's their turn, after the previous participant on the workflow has approved it.

To reject the document:

1. In your **Home**, click on the **Workflow** tab.
   The list of tasks you have to do is displayed.
2. Optionally click on the icon to open the document in a new tab, consult it and edit it.
3. From the **Workflow** tab, click on the **Process** button.
   The Validation task is displayed.



4. If you think that you won't be able to process the task, delegate it to another user. If not switch to the next step.
5. Optionally, type a comment to indicate why you reject the document.
6. Click on the **Reject** button.
   The task is not displayed anymore from the Workflow tab and the document. If you originally had read-only access to the document, you can't edit it anymore.
   The document is automatically sent back to the previous reviewer on the workflow, so he can edit it and approve it again.

When the document is rejected by the first reviewer, the document is sent back to the initiator, who can then either modify the document and resubmit it, or cancel the review.

Ending the Workflow

The workflow automatically ends when the last reviewer approves the document, and the document changes state if the initiator chose to do a validation review.

Related Documentation

- Starting a Serial Workflow
- Workflows user documentation
- Workflow in Nuxeo Studio

Parallel Document Workflow

The default parallel workflow, called "Parallel document review", is an unordered workflow that enables to change the document's state after a consultation step. This means that participants can give their opinion on the document without having to wait for a previous participant to approve it.

The workflow is composed of the steps below:

1. A user wants to make a document go to the Approved life cycle state, but would like to have the opinion of some other users. He executes a Parallel document review.
2. He select the users he wants to consult about the document, select a due date and starts the review.
   The participants all get a consultation task at the same time.
3. Each participant goes on the document and indicates if he approves or rejects the document.
4. When all participants have provided their opinion, the initiator gets a summary of the consultation.
5. He can then approve the document or not.
   - If he approved it, the document changes state.
   - If he rejects it, the document stays at the Project life cycle state.

The pages below describe how to proceed for each of these steps:

- Starting a Serial Workflow
- Participating to a Serial Workflow

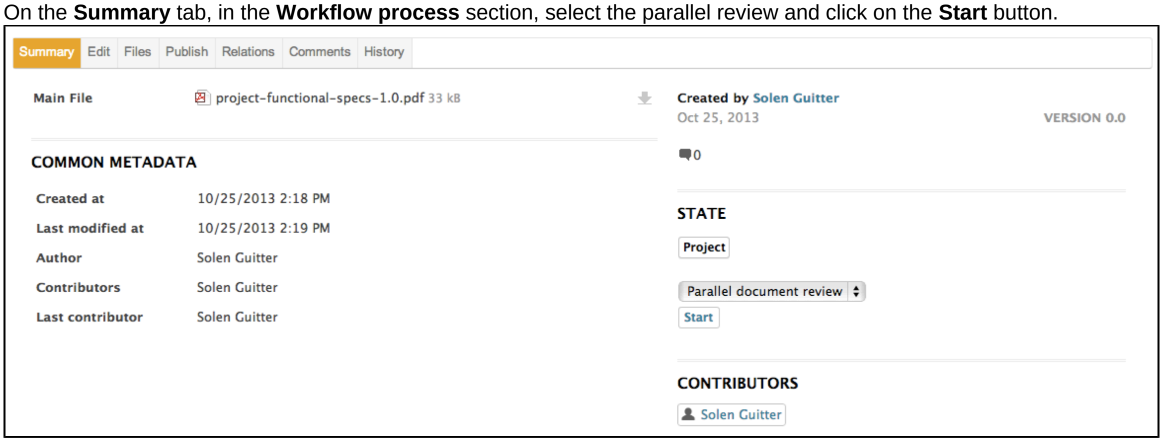
Starting a parallel workflow

You need to have writing or management rights to start a workflow, either parallel or serial.

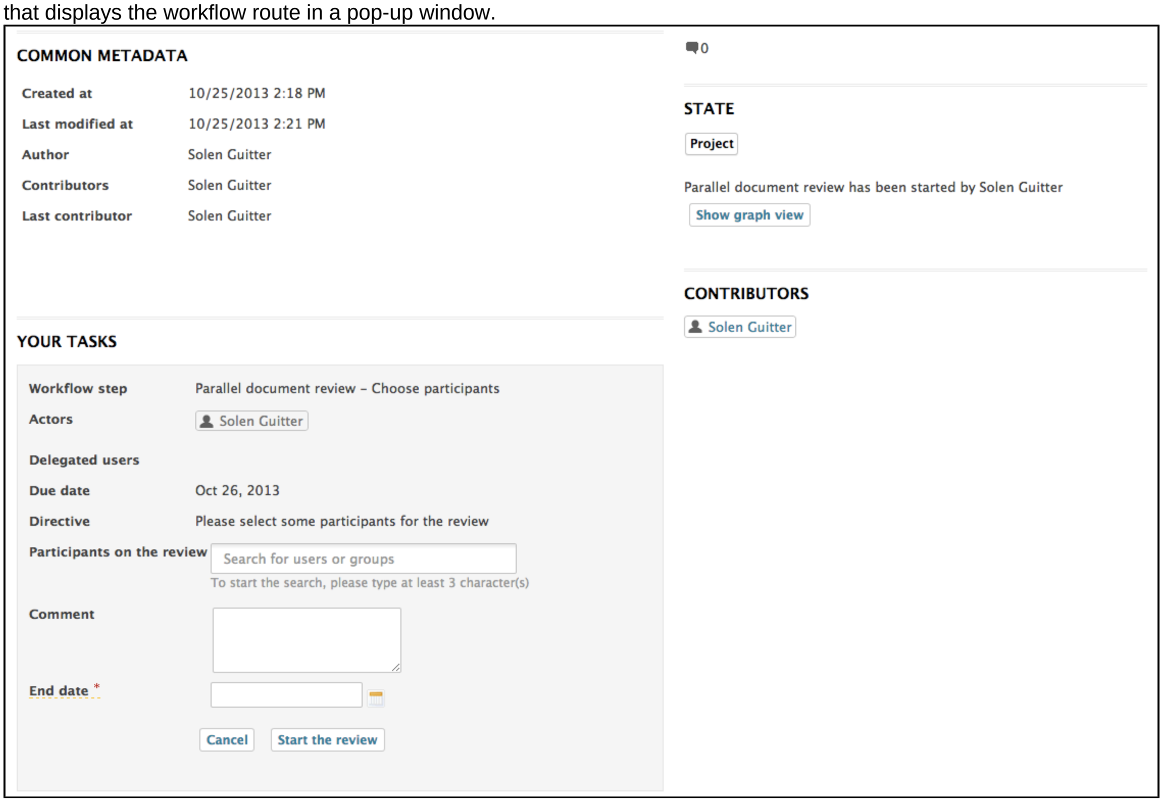
To start a parallel workflow, you need to select the workflow type, the reviewers and due date.

To start a parallel workflow:

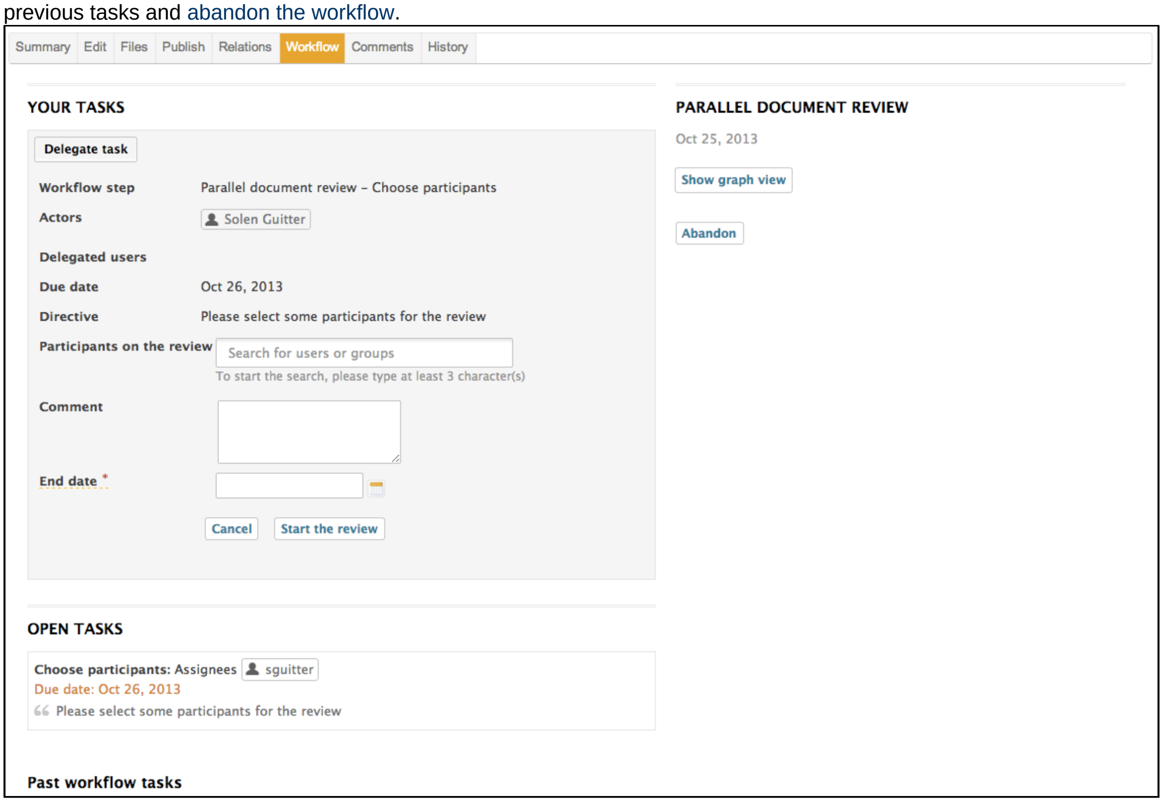
1. On the **Summary** tab, in the **Workflow process** section, select the parallel review and click on the **Start** button.



The form to select the reviewers and start the workflow is displayed on the **Summary** tab. A **Show graph view** button is also available, that displays the workflow route in a pop-up window.

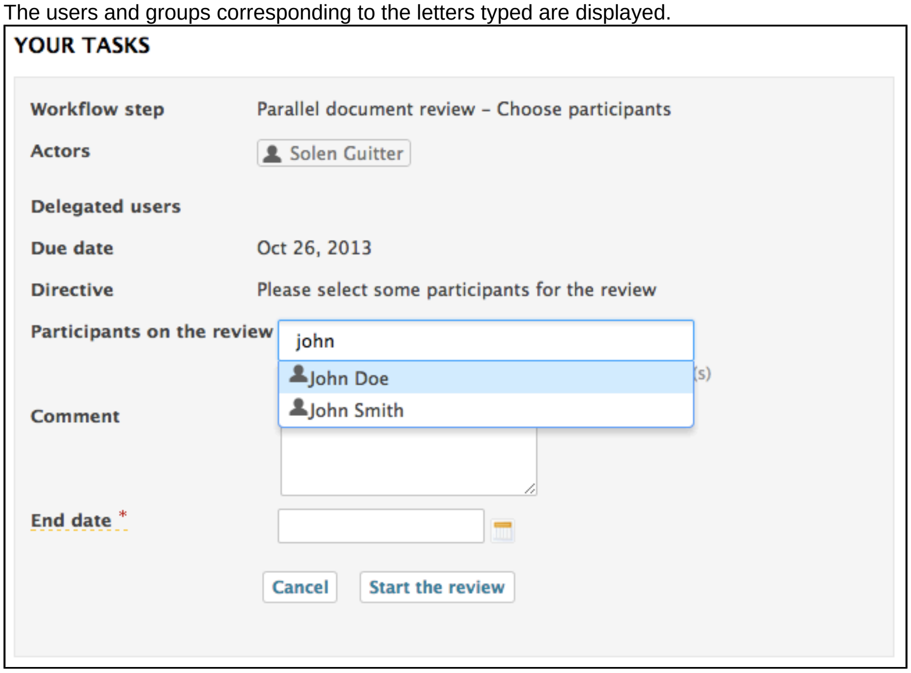


A **Workflow** tab is now available on the document from which you can select reviewers, see the graph view but also see the current and previous tasks and abandon the workflow.



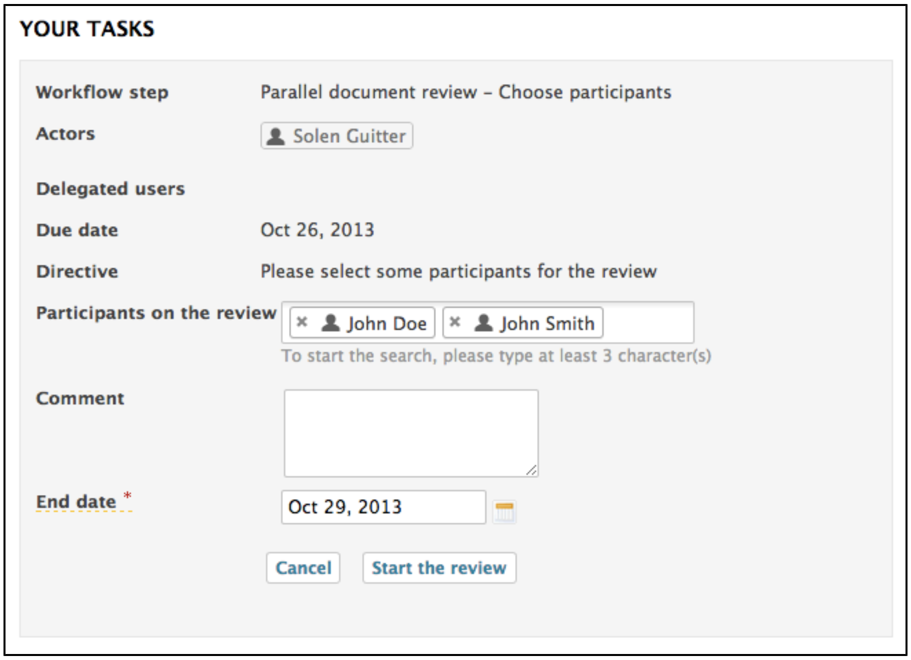
2. Search and select the users you want to consult for the review:
   a. In the **Participants on the review**, type the name of a user or a group.

      The users and groups corresponding to the letters typed are displayed.

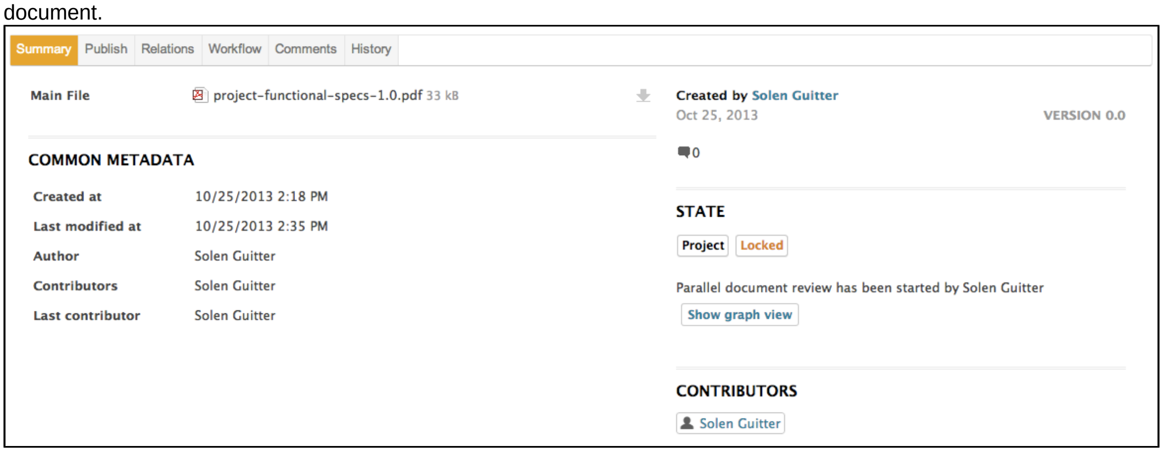


   b. Click on the user you want to add on the workflow.
   c. Repeat these two steps to add all the participants to the review.
3. Type a comment for the reviewers, for instance if you want them to pay attention to a specific section of the document.
4. Select the due date by when the participants need to have reviewed the document.

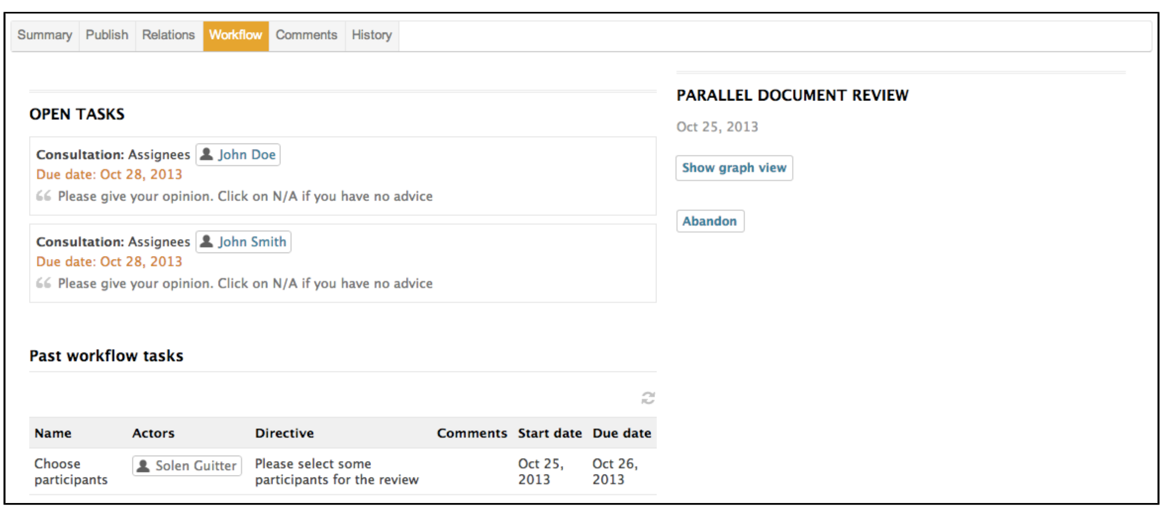
> When the due date is passed, the consultation task is automatically closed to all reviewers that haven't provided their opinion on the document and the workflow goes to the next step: the initiator approval.



5. Click on the **Start the review** button to let participants give their opinion on the document.
   Only the **Show graph view** button remains on the **Summary** tab. The document is locked so that only the workflow initiator can edit the document.



On the **Workflow** tab, the current task and the previous ones are displayed.



All reviewers get a Consultation task in their Home Workflow tab.

Participating to a Parallel Workflow

After the workflow initiator has started the parallel workflow, two steps need to be completed:

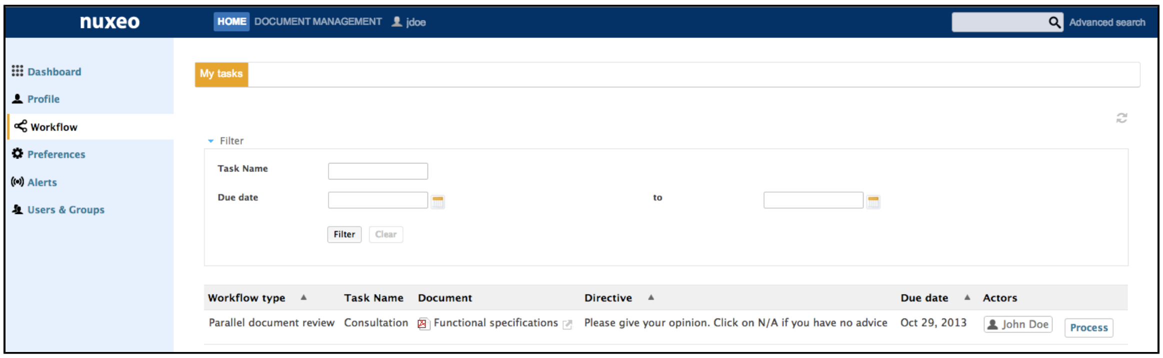
1. Reviewers need to provide their opinion on the approval of the document: Would they approve the document, reject it, or do they not have an opinion. That's the Consultation step, in which there is no order between the participants.
2. The Workflow initiator can then approve or not the document, after seeing the result of the consultation step. That's the Validation step.

In this section

Reviewing the Document

After the workflow initiator started the workflow, all reviewers get a Consultation task displayed:

- In the My tasks gadget of their dashboard,
- In the Workflow tab of their Home.



They also receive an email to inform them that they were assigned a task on a document:

> A task on the document Document_Title was assigned to you or to a group you belong to. You can consult the document following this link: Document_Title

The consultation task consists in saying if you would approve or reject the document, or if you have no opinion (N/A). All participants can review the document at any time: there is no order between them. But they need to review the document before the due date if they want to provide their opinion. When the due date is passed, all pending Consultation tasks are closed as N/A and the workflow goes to the Validation step.

To review a document:

1. In your **Home**, click on the **Workflow** tab.
   The list of tasks you have to do is displayed.
2. Optionally click on the icon to open the document in a new tab and consult it.
3. Click on the **Process** button.
   The Consultation task form is displayed in the Workflow tab.
4. If you think that you won't be able to process the task, delegate it to another user. If not switch to the next step.
5. Click on one of the buttons to provide your opinion on the document validation:
   - Approve: you agree with the document being approved;
   - Reject: you think that the document is not ready to be approved;
   - N/A: you are not concerned by the document or don't have an opinion about its validation.

   Your consultation task is done. The task is removed from your dashboard and your Workflow tab.
   On the document, the consultation is displayed in the Previous tasks of the Workflow tab.

> **Other location to process the task**
> The task form is also displayed on the document's Summary tab and its Workflow tab.

Final Validation of the Document

When all reviewers have done their consultation task, the document goes back to the initiator of the review so he can see the opinion of the reviewers and approve or reject the document.

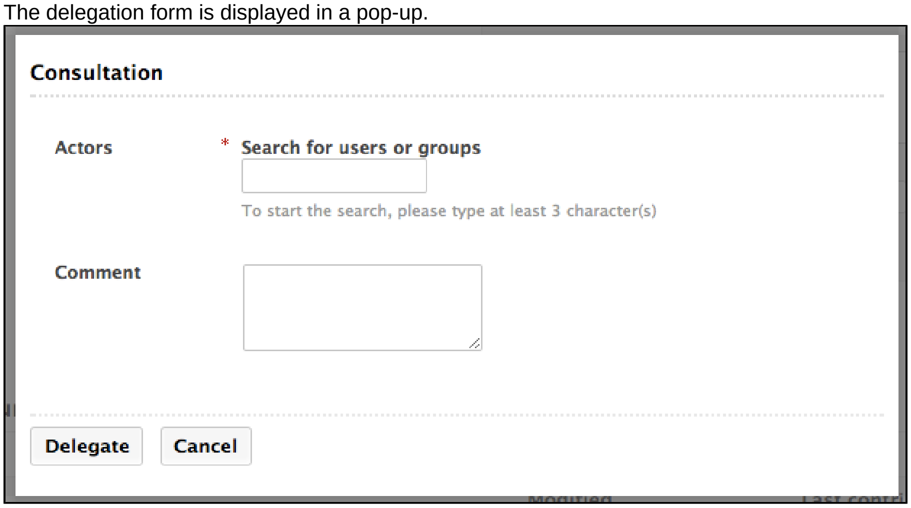
Delegating a Task

When you know you might not be able to perform a task, you can delegate it to another user or group of users. Delegating means that they can do the task at your place, but you are not unassigned the task. As soon as you or a delegatee reviews the document, the task is closed for you and all the delegatees.

You can delegate a task from:

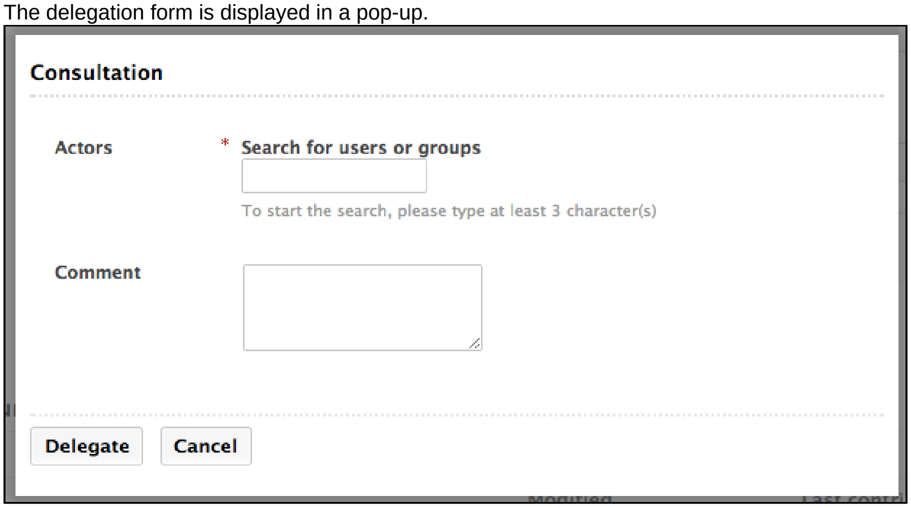
- The Process view of the tasks in the Home Workflow tab,
- The Workflow tab of the document.

To delegate the task from the Home Workflow tab:

1. Click on the **Process** button of the task to delegate.
2. In the **More** menu in the top right corner, click on **Delegate task**.
   The delegation form is displayed in a pop-up.
   

3. In the Actors field, type the name of a user or group.
4. Click on the user or group you want to delegate the task to.
5. Optionally repeat these steps as many times as you want to delegate the task.
6. Optionally type a comment for the delegatees.
7. Click on the **Delegate** button.
   You are displayed the **My tasks** tab of the **Workflow** tab.
   If you click on the task Process button, you can see the list of delegatees displayed on the task.

To delegate a task from the document's Workflow tab:

1. Click on the **Delegate task** button displayed in the top left corner of the task.
2. The delegation form is displayed in a pop-up.
   

3. In the Actors field, type the name of a user or group.
4. Click on the user or group you want to delegate the task to.
5. Optionally repeat these steps as many times as you want to delegate the task.
6. Optionally type a comment for the delegatees.
7. Click on the **Delegate** button.
   The Workflow tab of the document is displayed. The list of delegatees is displayed on the task.

Abandoning a Workflow

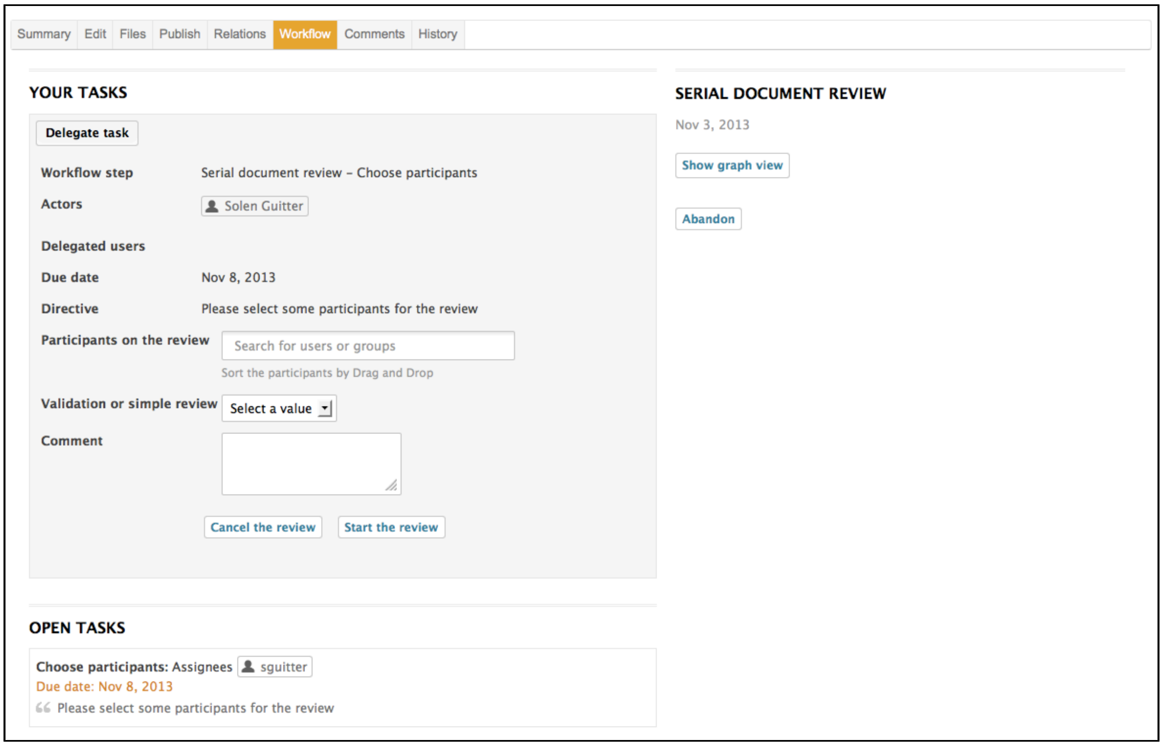
Only the workflow initiator and administrators can abandon a workflow.

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

Abandoning the workflow can be done at any time. The workflow initiator can also decide to cancel the workflow when he gets an update request from the first reviewer. When the first reviewer rejects the document, it goes back to the initiator, who should then either edit the document and resubmit it, or cancel the review.

To abandon a workflow:

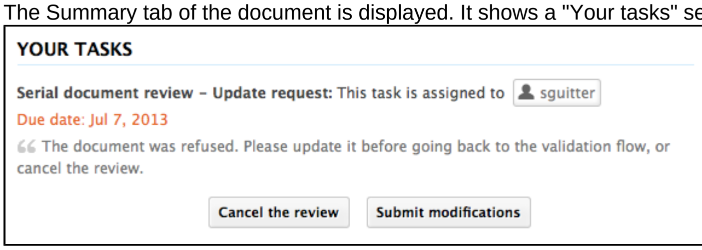
1. Click on the **Workflow** tab of the document.



2. Click on the **Abandon** button.
   A confirmation window pops up.
3. Click on **OK** to confirm abandon.
   The workflow is immediately canceled. The life cycle state of the document does not change and the modifications done during the workflow are still saved.

To cancel a workflow after an update request:

1. From your dashboard, click on the document for which you have an update task in the "My tasks" gadget.
   The Summary tab of the document is displayed. It shows a "Your tasks" section.



2. Click on the **Cancel the review** button.
   The workflow is immediately stopped. The life cycle state of the document does not change and the possible modifications done during the workflow are still saved.

Related documentation

- Workflows
- Case Management with the Nuxeo Platform

Customizing the workflow

- Workflow in Nuxeo Studio
- Workflow developer documentation

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.

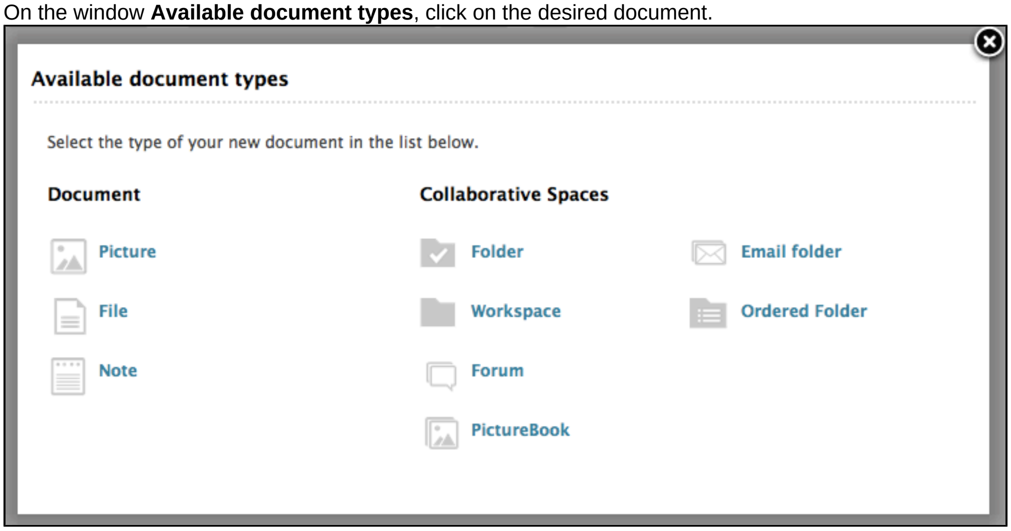
Forum creation and edition are available for users with "Write" and "Manage" rights.
Users with "Manage" rights can also manage the forum like a workspace, i.e. give users access rights, set alerts and manage the forum's trash.

Creating a Forum

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

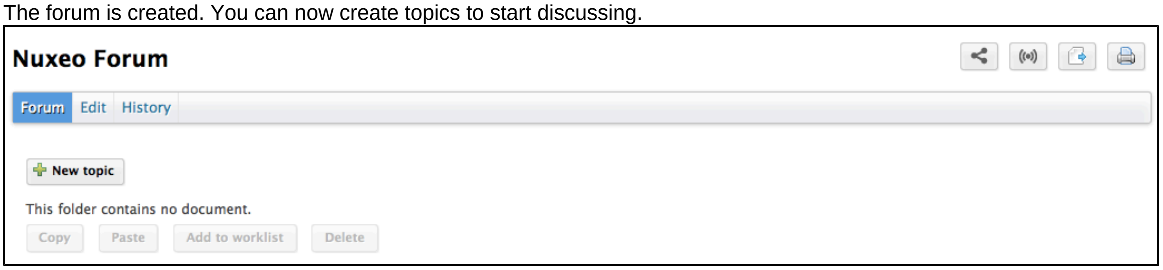
You can create forums only in workspaces.

To create a forum:

1. In the **Content** tab of the workspace, click on the **New** 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.



Editing a Forum

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

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

To edit a forum:

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

Managing Topics

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

- In an topic without moderation, the content is available without preliminary approval.

- In a moderated topic, the content needs to be approved by a moderator to be visible for users.

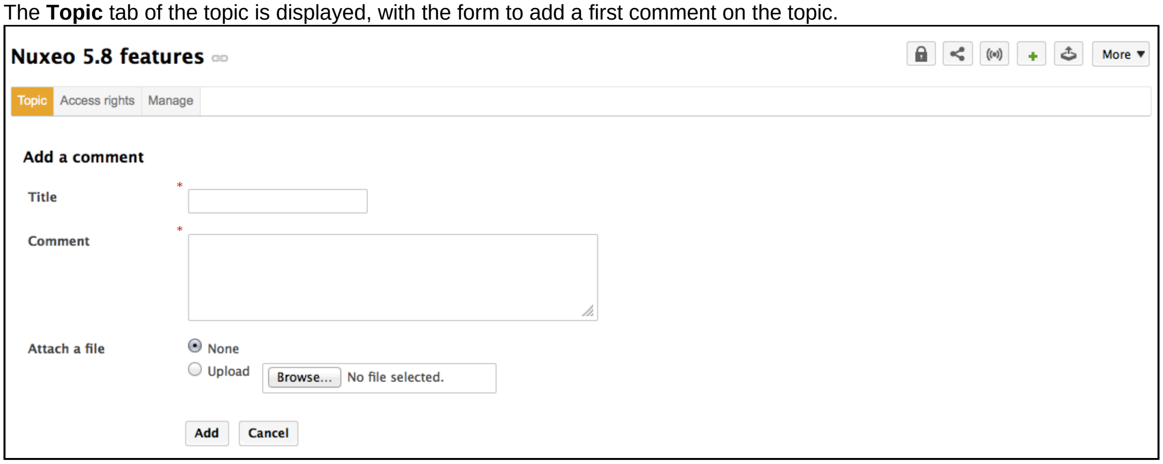
> You are automatically added as a moderator if you create a moderated topic.

On this page

Adding a Topic

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.

Moderating a Topic

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

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

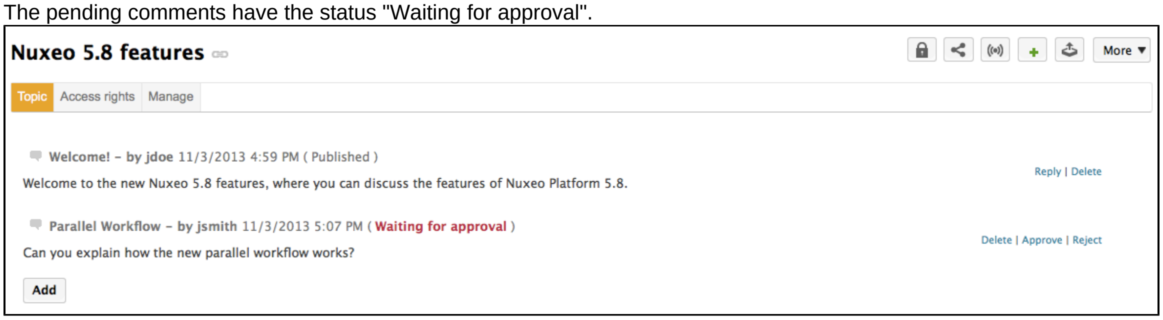
Moderators can see if there are comments pending in the forum tab. The number of comments waiting for approval is indicated for each topic of the forum. They also have a moderation task displayed in their dashboard, in their My tasks gadget.

Approving a Comment

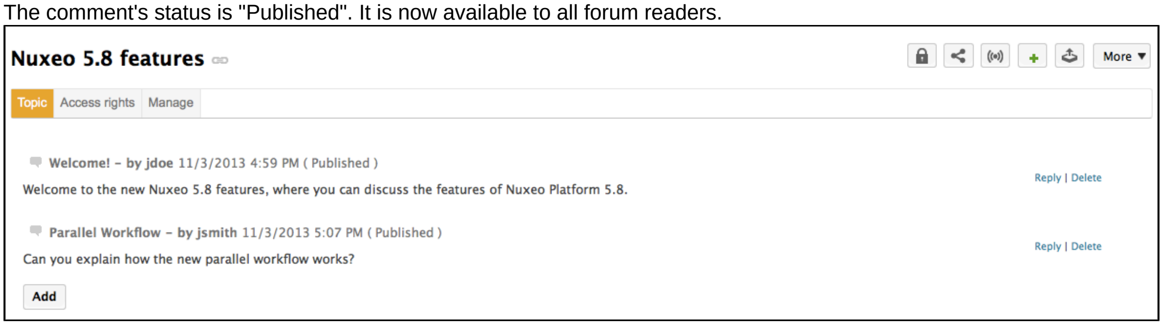
Approving a comment means to publish it in the thread and make it available for all forum users.

To approve a comment:

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



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.

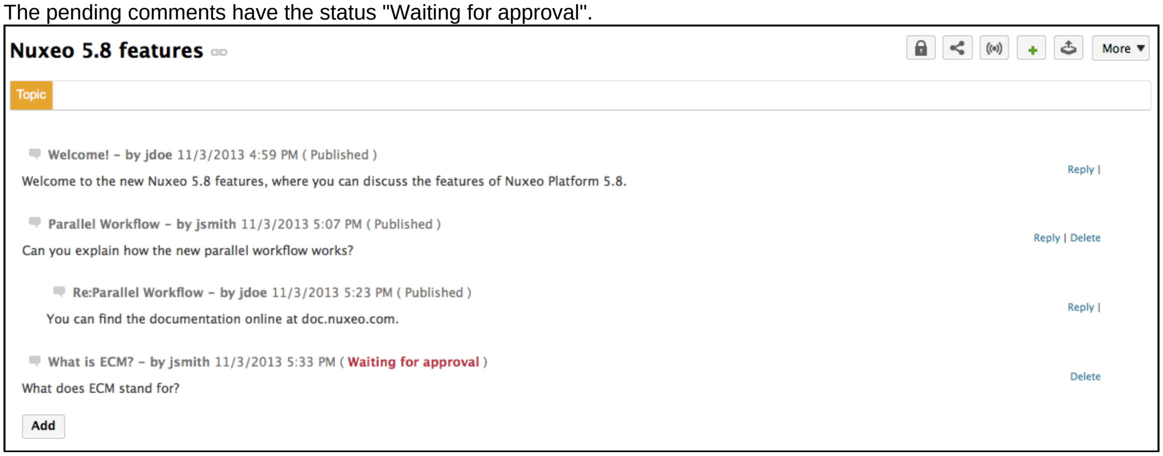


Rejecting a Comment

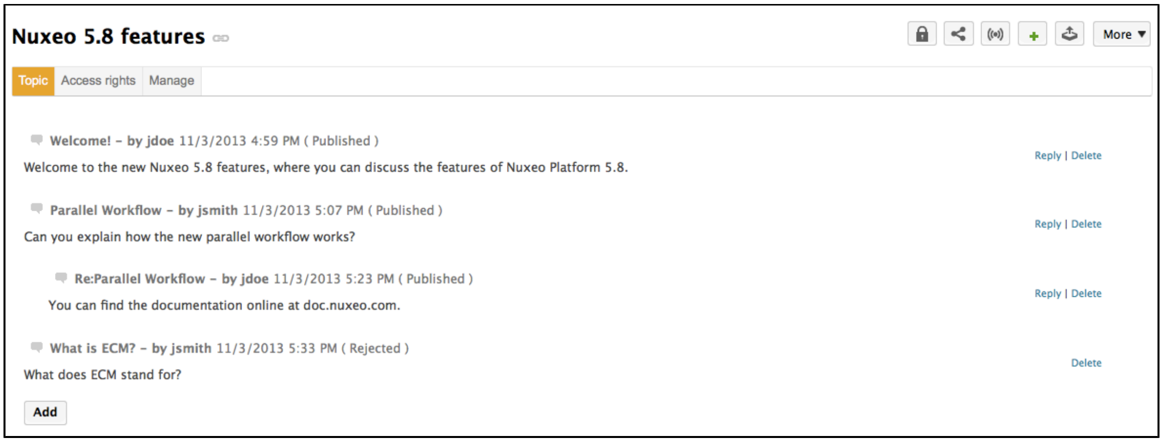
Rejecting a comment means that you make the comment permanently unavailable for forum users.

To reject a comment:

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



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.



Deleting a Comment

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

To delete a comment in a topic:

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

Deleting a Topic

Deleting a topic means deleting its content as well.

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

To delete a topic:

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

Participating to a Topic

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

Adding a Comment to a Topic

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

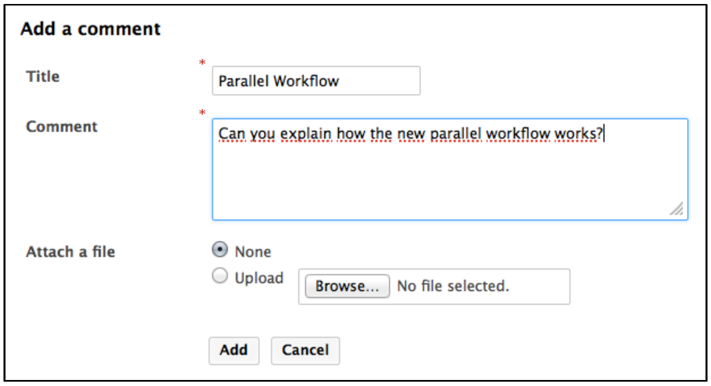
You can attach a file to your comment, that users will be able to consult. The attached file of a comment cannot be modified or removed afterwards.

To add a comment to a topic:

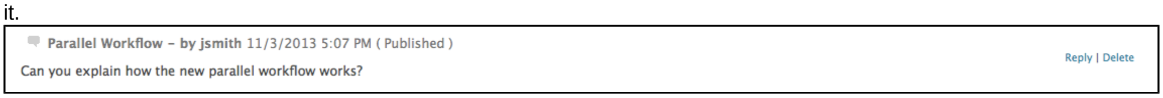
1. Click on the **Topic** tab of the topic.

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

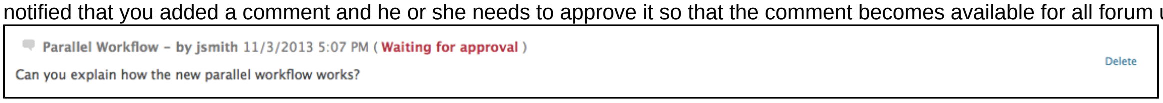
2. Click on the **Add** button to display the form to add a comment.



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

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

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

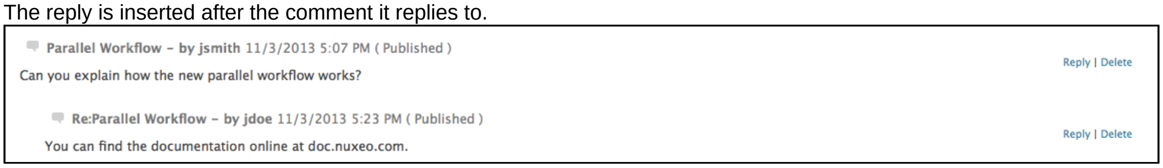
Replying to a Comment

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

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

To reply to a comment:

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

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

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.

The Document Management module of the Nuxeo Platform enables users to create pictures in a picture book, in a workspace or in a folder. Pictures have some specific features available:

- rotation,
- picture specific metadata extraction,
- different size presentation.

On this page

Managing Picture Books

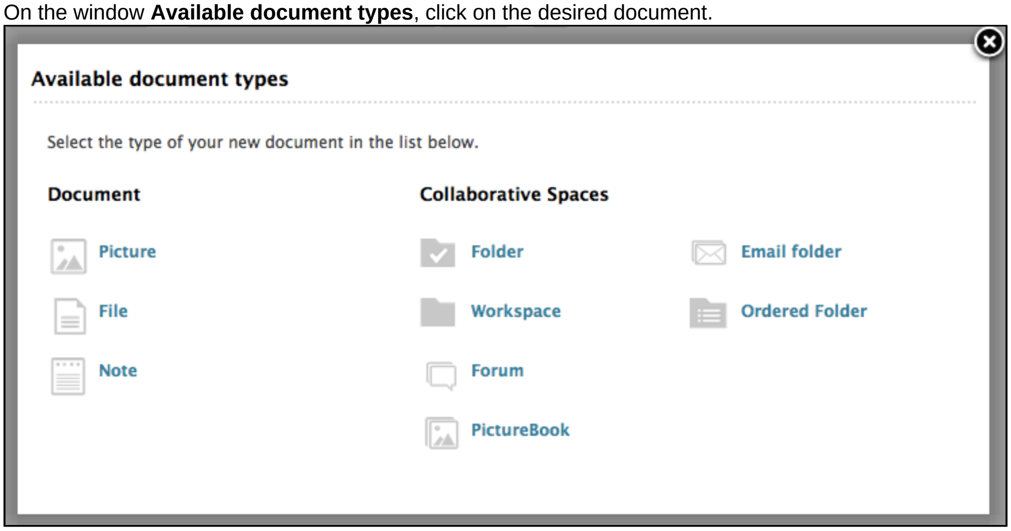
Picture books are folders adapted to hold only pictures. As so, you have some specific parameters that you need to fill in when you create a picture book.
A picture book can only hold pictures and other picture books.

Creating a Picture Book

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

To create a picture book:

1. In the **Content** tab of the workspace, click on the **New** 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.

Editing a Picture Book

You need to have at least Write right to edit a picture book.
When you edit a picture book, you edit some of its properties: title, description and slideshow duration. You cannot edit the picture views available in the picture book.

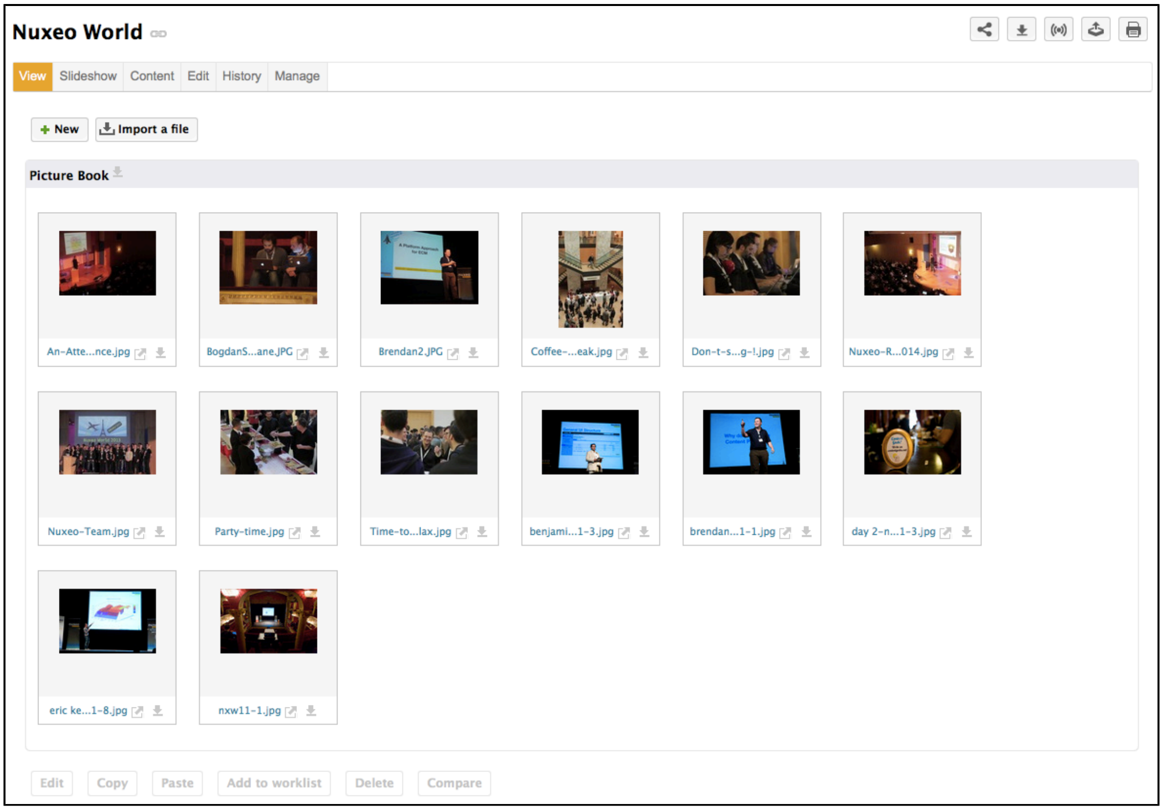
To edit a picture book:

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

Viewing the Content of a Picture Book

Beside the **Content** tab that enables 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, etc.

In the **View** tab of the picture book, click once on a picture to select it, click on it again to unselect it. Click twice on it to consult it. Selected pictures are displayed on an blue background.



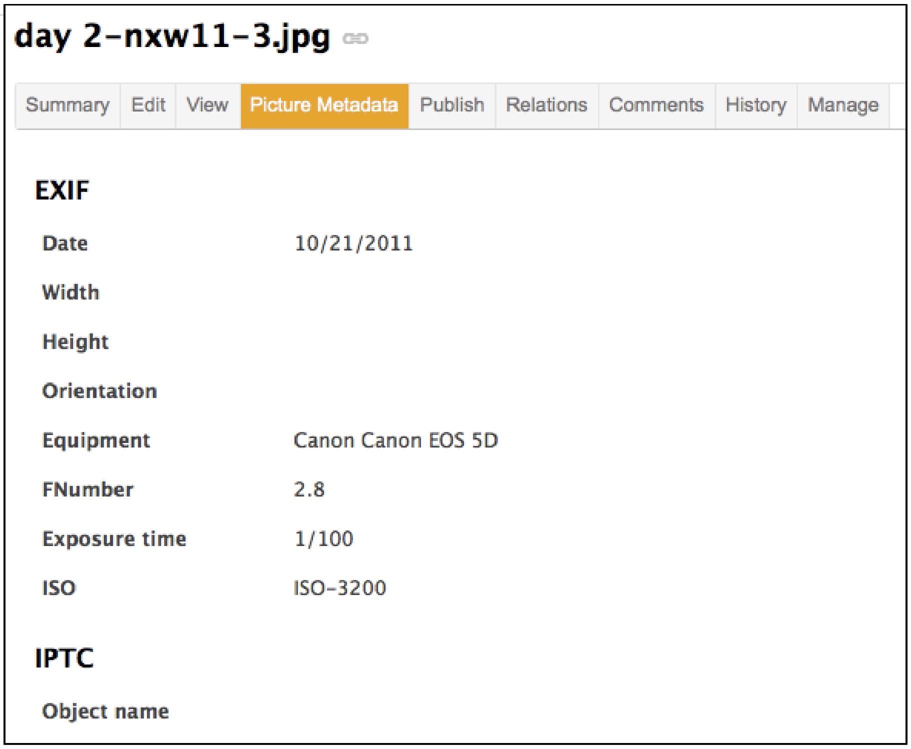
A **Slideshow** tab is also available on picture books, in which the pictures are displayed in a slideshow.

Managing Pictures

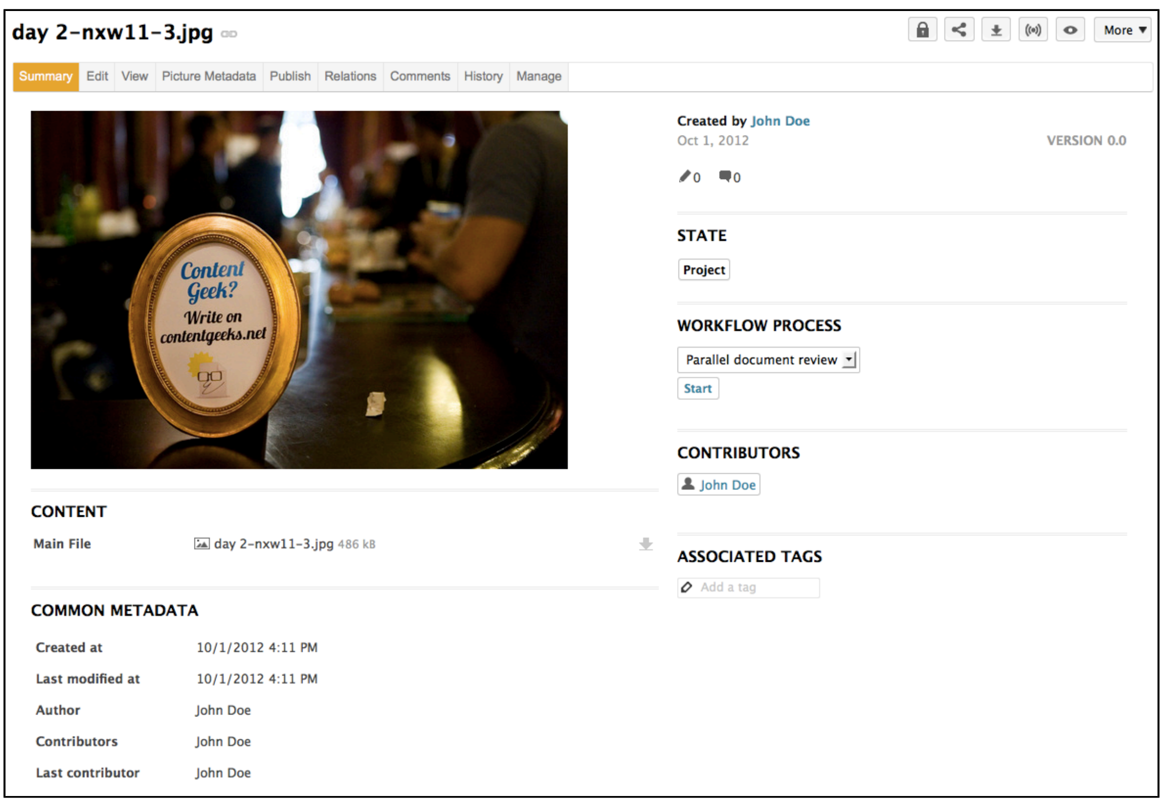
Pictures can be created in picture book, in folders and in workspaces. You can add pictures using all document creation means:

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

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



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



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, etc.

Email Folders

Email folders are folders in which you can fetch emails to store and share them in your Nuxeo application. The email folder is not intended to be a webmail. It will fetch the unread emails on your email server either when you manually trigger the fetch from Nuxeo interface or automatically at regular intervals.

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

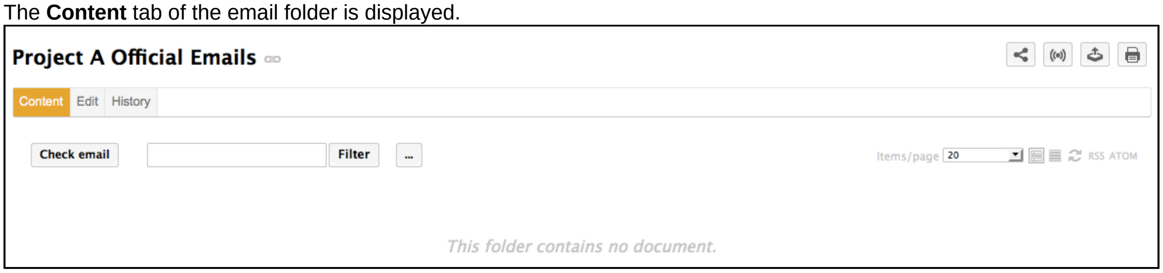
- Subject
- Sender
- Sending date
- Recipients
- CC Recipients
- Text: content of the email
- Attachments

On this page:

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

Creating an Email Folder

To create an email folder

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

   You can now fetch emails.

Email folder parameters

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

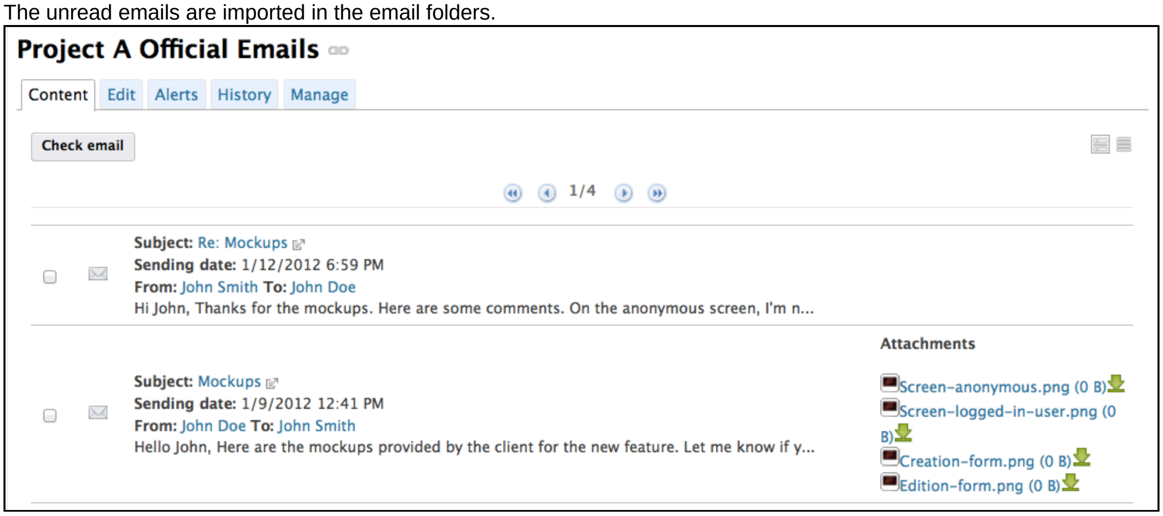
Limit of new fetched emails	Indicate the maximum number of emails to be fetched at the same time.

The actions available on an email folder are:

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

Fetching Emails

To fetch emails:

1. In your email client, mark the emails you want to fetch as unread.
2. In Nuxeo, 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 follow the email folder's activity.

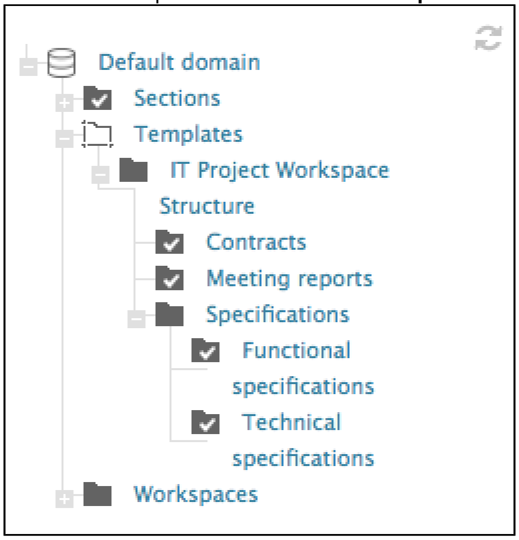
Using Workspace Templates

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

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

To create a template:

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



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

Templates and User Rights Management

- When you set access rights on the 1st-level workspace of a template - here IT project workspace structure-, it will be inherited in the new workspaces. For example, a user who is not allowed to read "IT project workspace structure" will not be able to see it when creating a workspace.

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

Exporting Documents

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

- One document at a time,
- A selection of documents,
- An entire workspace, folder, section.

There are several types of export:

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

Export is available from:

- The worklist,

- The Export options page, available by clicking the icon below the search box or the **More** menu.

On this page

Exporting Attachments

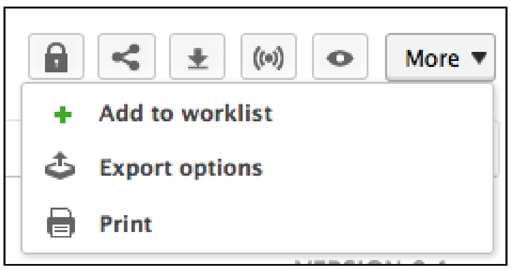
Users can easily export the attachments of a document or of a selection of documents, i.e. their main file and the additional attachments added from the **Files** tab of the documents.

Exporting a Document's Attachments

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

To export the attachments of a document:

1. From the document, click on the icon or, if the icon is not available on the action bar, on the **Export options** entry of the **More** menu.



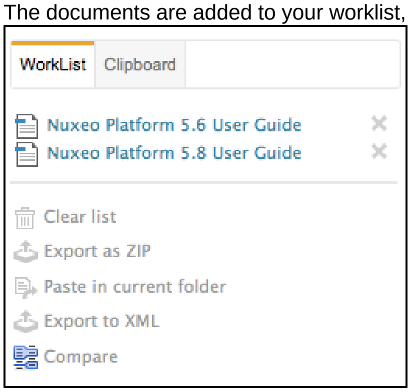
2. Click on ZIP Binary Export.
   You are proposed to save a "clipboard.zip" file on your computer.
3. Save it.
   When you unzip it, you get the document's attachments and an INDEX.txt file that summarizes the content of the export.

Exporting the Attachments of a Document Selection

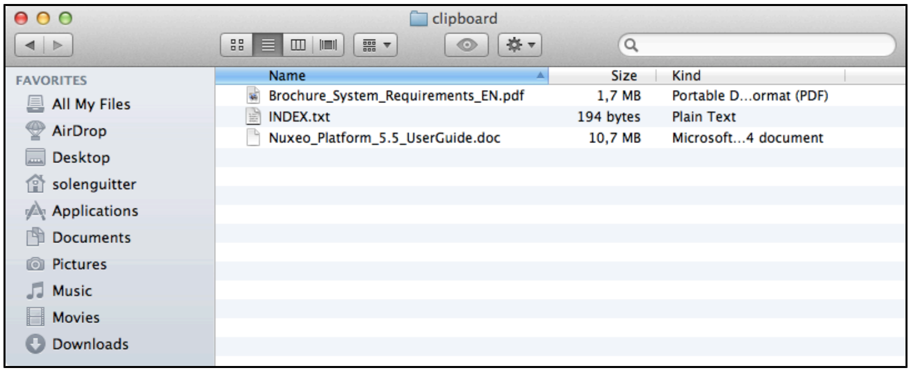
You can export the attachments of several documents at the same time, using the worklist.

To export a selection of documents:

1. Check the box that corresponds to the documents to export to select it.
2. Click on the **Add to worklist** button.
   The documents are added to your worklist, in the left part of the screen.



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

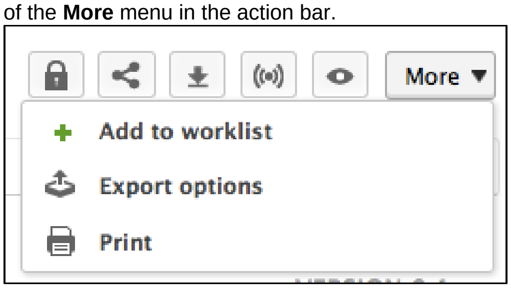


Exporting the Content of a Workspace

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

To export the content of a workspace:

1. From the workspace, folder or section, click on the icon or, if the icon is not available on the action bar, on the **Export options** entry of the **More** menu in the action bar.



2. Click on **ZIP Binary Export**.
   You are proposed to save a "clipboard.zip" file on your computer.
3. Save it.
   When you unzip it, you get a folder that represents the Nuxeo space structure and documents' attachments and an INDEX.txt file that summarizes the content structure of the export.

Exporting the List of Documents a Folder

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

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

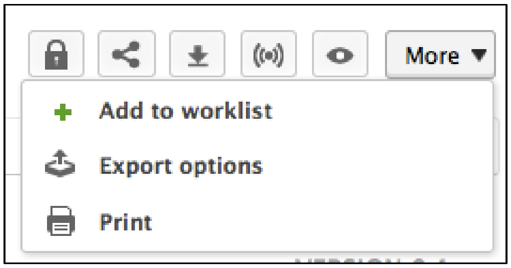
To export the list of documents of a space in an Excel file:

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

> The Excel export is also available from the **Export options** page, by clicking the icon or the **Export options** entry of the **More** men u.

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

1. From the workspace, folder or section, click on the icon or, if the icon is not available on the action bar, on the **Export options** entry of the **More** menu in the action bar.



2. Click on **PDF Export**.
   The PDF view of the page opens in a new tab. It displays:

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

Low-Level Exports

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

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

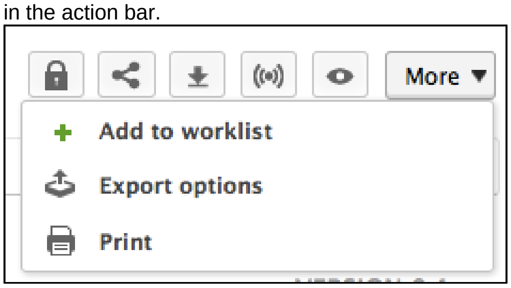
XML Export of a Single Document

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

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

To get the XML export of a document:

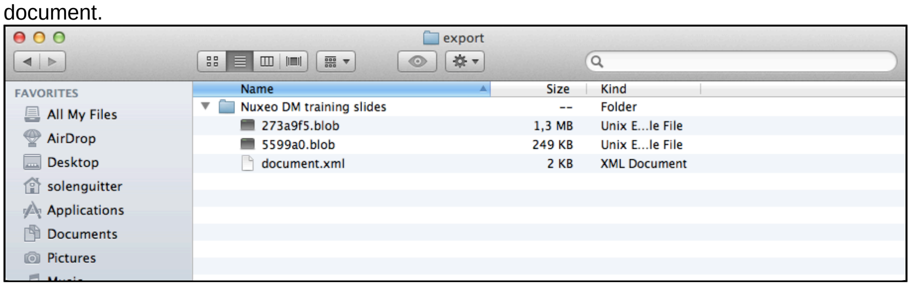
1. From the document, click on the icon or, if the icon is not available on the action bar, on the **Export options** entry of the **More** menu in the action bar.



2. Click on **ZIP XML Export**.
   You are proposed to save a "export.zip" file on your computer.

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

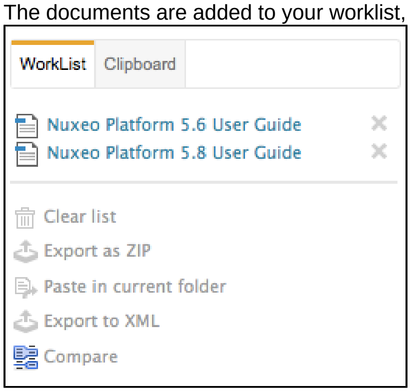
3. Save the "export.zip" file.
   When you unzip it, you get a folder named from the document, that contains a document.xml file and .blob for each attachment of the document.

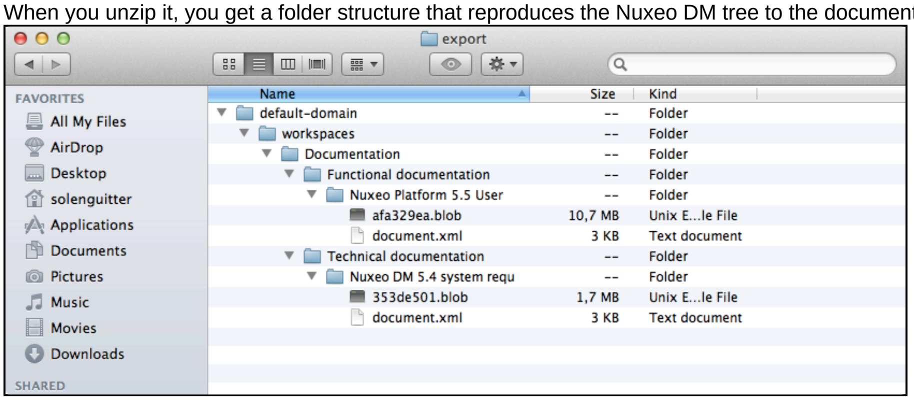


XML Export of a Document Selection

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

To export a selection of documents:

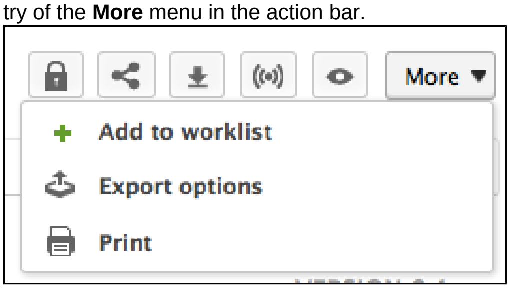
1. Check the box that corresponds to the documents to export to select it.
2. Click on the **Add to worklist** button.
   The documents are added to your worklist, in the left part of the screen.
   

3. Optionally go in other folders and add other documents to your worklist.
4. In the worklist, click on the **Export to XML** link.
5. Save the "export.zip" folder.
   When you unzip it, you get a folder structure that reproduces the Nuxeo DM tree to the document.
   

XML Export of a Folder

It is possible to export a whole workspace, section or folder in a zipped XML folder. This specific export enables users to import the folder back, with the same access rights definition.

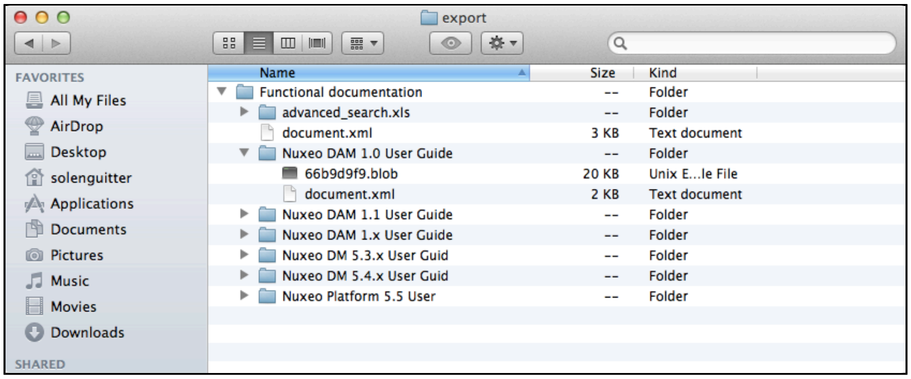
To get the XML export of a folder:

1. From the folder (or workspace or section), click on the icon or, if the icon is not available on the action bar, on the **Export options** entry of the **More** menu in the action bar.
   

2. Click on **ZIP Tree XML Export**.
   You are proposed to save a "export.zip" file on your computer.

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

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



Comparing Documents

It is possible to compare two documents or two versions of a document to see the differences between documents or versions.

When you compare two documents or versions of a document, the elements below are compared:

- the metadata (title, coverage, modification date, etc),
- the content (note or main attachment depending on the document involved),
- the attached files.

The comparison features comes as a Marketplace addon on the naked Platform, called Nuxeo Diff. Since Nuxeo Platform 5.8, it is integrated by default in the Document Management module. Please refer to the Nuxeo Diff documentation for a complete description of this feature.

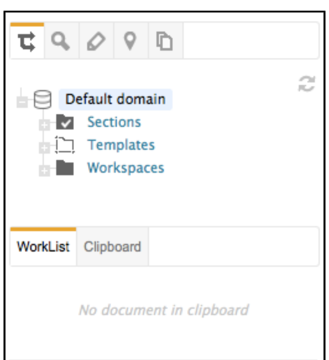
Related pages

- Nuxeo Diff user documentation
- Nuxeo Diff dev documentation

Copying and Moving Documents

Copying and moving documents requires to have at least Read right on the original document and Write right in the target workspace. Copy and move are possible in workspaces and workspaces templates. To copy a document in a section you need to publish it in the new section. To move it from a section to another, you need to unpublish it from the first section and publish it in the second one.

Copying and Moving are done using the clipboard and worklist, which are located in the left part of the screen, below the navigation tree.



In this section

Clipboard? Worklist?

What is the difference between the clipboard and the worklist?

Both are used to select documents and apply actions on these documents. Possible actions are:

- copy,
- move,
- export,
- compare.

There are two differences between the clipboard and the worklist:

- the clipboard is a one-shot selection: when you select one or several documents and add them to the clipboard, it replaces the previous selection. On the contrary, putting documents to the worklist adds them to the existing selection.
- the worklist content is kept when you log out: your selection is still available when you log back in, until you remove documents from the worklist. The clipboard selection is lost when you log out.

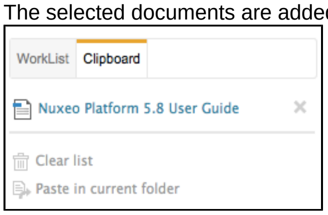
Copying Documents

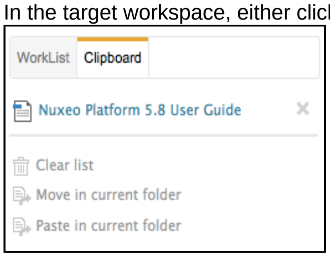
There are two ways to copy documents:

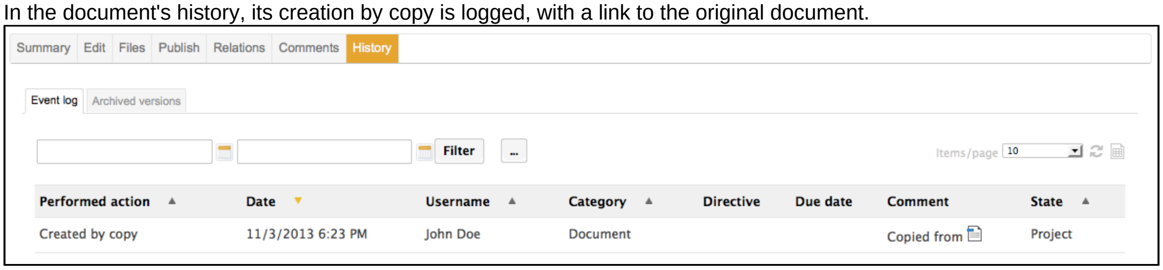
- if you need to copy only one document or documents from the same workspace, use the clipboard;
- if you need to copy several documents from different workspaces, use the worklist.

Copying Documents from the Same Workspace

To copy one or several documents from a single workspace at the same time:

1. In the workspace **Content** tab, check the box(es) corresponding to the document(s) you want to copy.
2. Click on the **Copy** button below the table.
   The selected documents are added to the clipboard, which is displayed instead of the worklist.
   

   A **Paste in current folder** action is immediately available, so you duplicate the document in the current workspace.
3. Go to the workspace where you want to copy the document(s).
4. In the target workspace, either click on the **Paste** button in the **Content** tab or the **Paste in current folder** link in the clipboard.
   

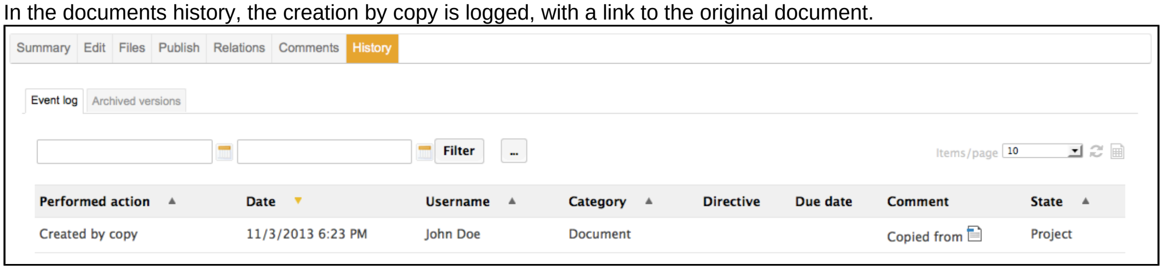
   A new document is created in the current workspace, that has the same title as the original document.
   In the document's history, its creation by copy is logged, with a link to the original document.
   

Copying Documents from Different Workspaces

You can paste documents from different workspaces at the same time. To do that, you need to add documents to your worklist instead of copying them.

1. Go in a workspace.
2. In the first workspace **Content** tab, check the box(es) corresponding to the document(s) you want to copy.
3. Click on the **Add to worklist** button below the table.

The selected documents are added to the worklist.
A **Paste in current folder** action is immediately available, so you duplicate the documents in the current workspace.
4. Repeat steps 1 to 3 as many times as you need.
5. When you have added all the documents you need to your worklist, go in the workspace where you want to paste the documents.
6. Either click on the **Paste** button in the **Content** tab or the **Paste in current folder** link in the worklist.
Documents are created in the current workspace, that have the same title as the original documents.
In the documents history, the creation by copy is logged, with a link to the original document.

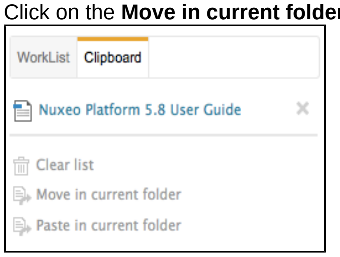


Moving Documents

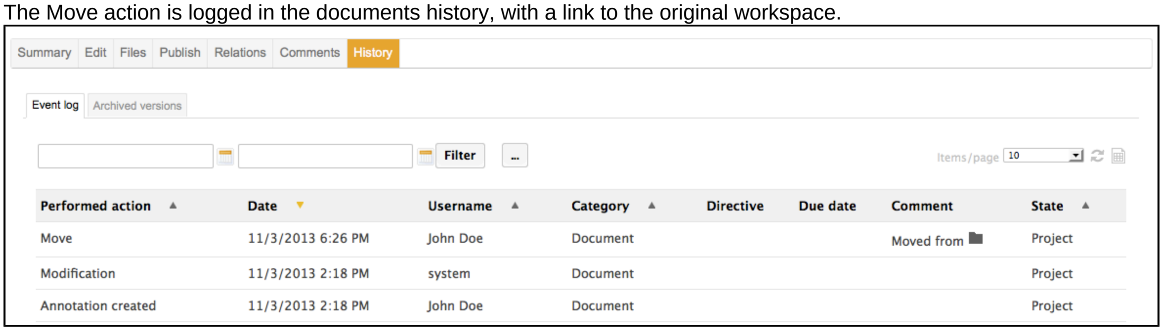
Moving Documents from the Same Workspace

To move one or several documents from a single workspace at the same time, you can use either the clipboard or the worklist. Steps are given here to use the clipboard.

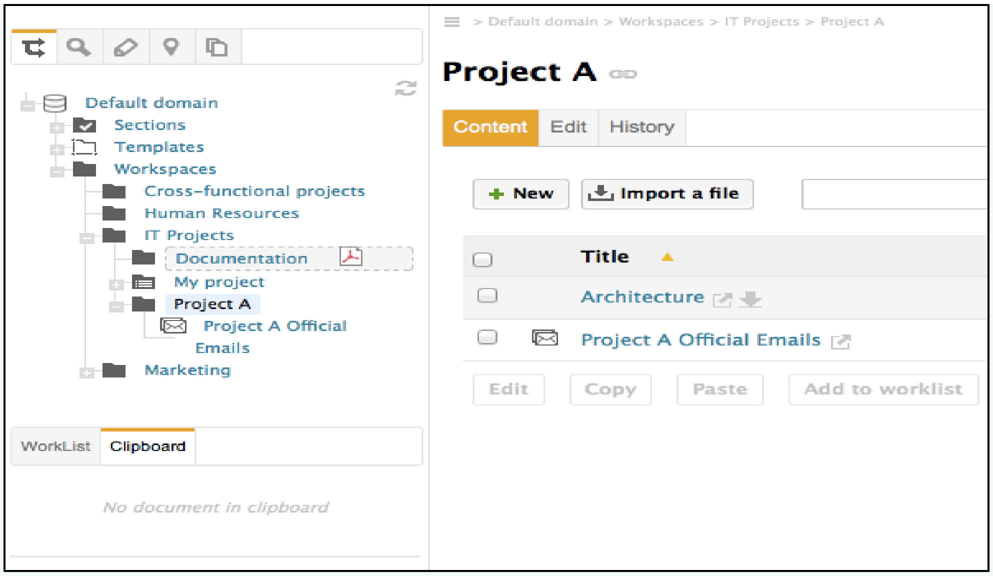
1. In the workspace **Content** tab, check the box(es) corresponding to the document(s) you want to move.
2. Click on the **Copy** button below the table.
The selected documents are added to the clipboard, which is displayed instead of the worklist.
3. Go to the workspace where you want to move the document(s).
4. Click on the **Move in current folder** link in the clipboard.



The documents are now available from this workspace. They are not available anymore from the other workspace.
The Move action is logged in the documents history, with a link to the original workspace.



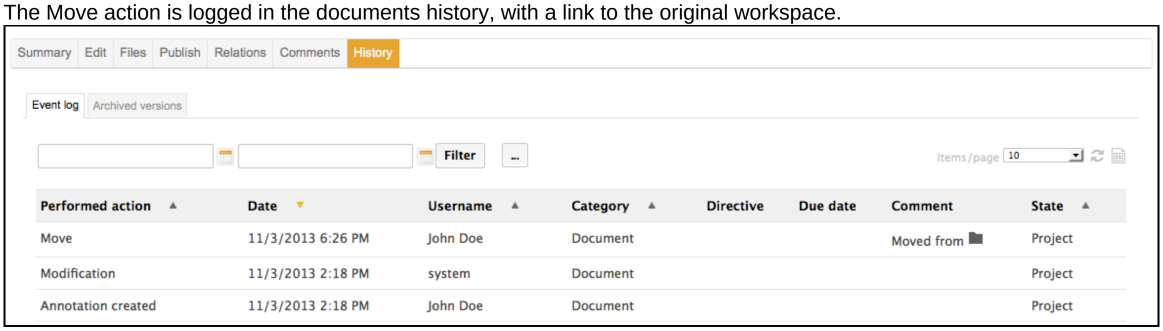
Moving using drag and drop
You can also move documents one by one by dragging their icon from the **Content** tab to the target workspace in the navigation tree.



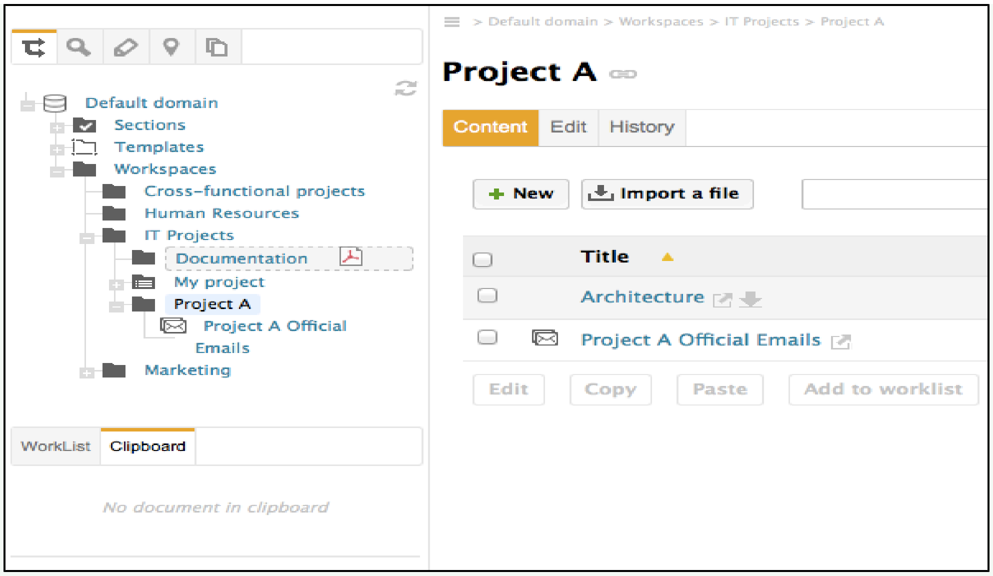
Moving Documents from Several Workspaces

To move several documents from different workspaces at the same time:

1. Go in a workspace.
2. In the first workspace **Content** tab, check the box(es) corresponding to the document(s) you want to move.
3. Click on the **Add to worklist** button below the table.
   The selected documents are added to the worklist.
4. Repeat steps 1 to 3 as many times as you need.
5. Go to the workspace where you want to move the document(s).
6. Click on the **Move in current folder** link in the worklist.
   The documents are now available from this workspace. They are not available anymore from the other workspaces.
   The Move action is logged in the documents history, with a link to the original workspace.



Moving using drag and drop
You can also move documents one by one by dragging their icon from the **Content** tab to the target workspace in the navigation tree.



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,
- tagging,
- 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. The workspace document can be deleted without the published document to be affected: section readers will still be able to consult the published document, comment it, etc.

Published documents are for consultation only and cannot be modified. If you want to modify a published document, you must modify it in the workspace and then publish the modified version of the document.

When you want to publish a document, you need to submit it to publishing. When the document is submitted to publication, the section's managers can approve the publication submission, that is to say publish the document, or reject it. In that last case, the document is not available in the section. However, it is still available in the workspace. You can modify it and submit it again.

Publishing Documents

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.

When you publish a document, the following elements are kept from the workspace document:

- The metadata,
- All attachments,
- The document history (Event log tab only),
- The tags (if this is a first publication — in case of a republication, tags from the workspace are merged with existing tags on the published document),

The following elements are not available on the published document:

- The comments,
- The relations,

> It is possible to enable the duplication of relations when the document is published.

- The archived versions of the document.

On this page

Submitting a Document to Publishing

To submit a document to publication, you need the following rights:

- at least write on the workspace from which you want to publish,
- at least read on the section into which you want to publish the document

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.

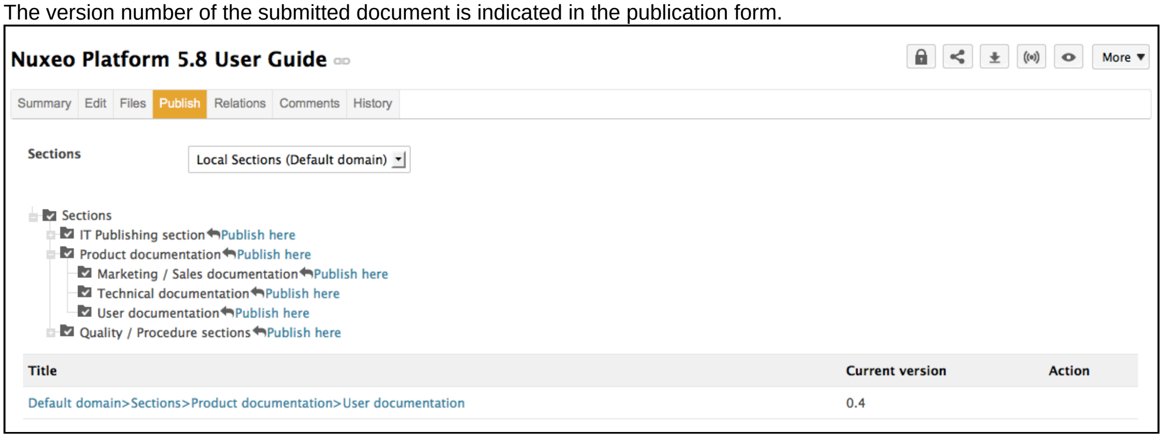
To submit a document to publishing:

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 submitted to publication in the section:

- Users with read right in the section don't see it yet, since its publication has to be approved.
- Users with Write or Manage everything right can see it in the section and in their dashboard as a pending document. They need to approve its publication.

> If you have write or management rights in the selected section, the document is automatically published and visible to

all section users. It doesn't need to be approved.

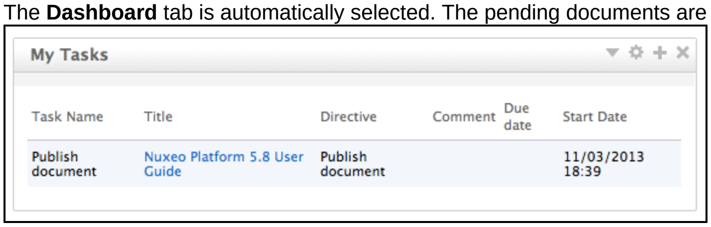
In the workspace, the document's minor version is automatically incremented if the published version doesn't correspond to the latest archived version (version number is suffixed with +, 0.1+ for instance).

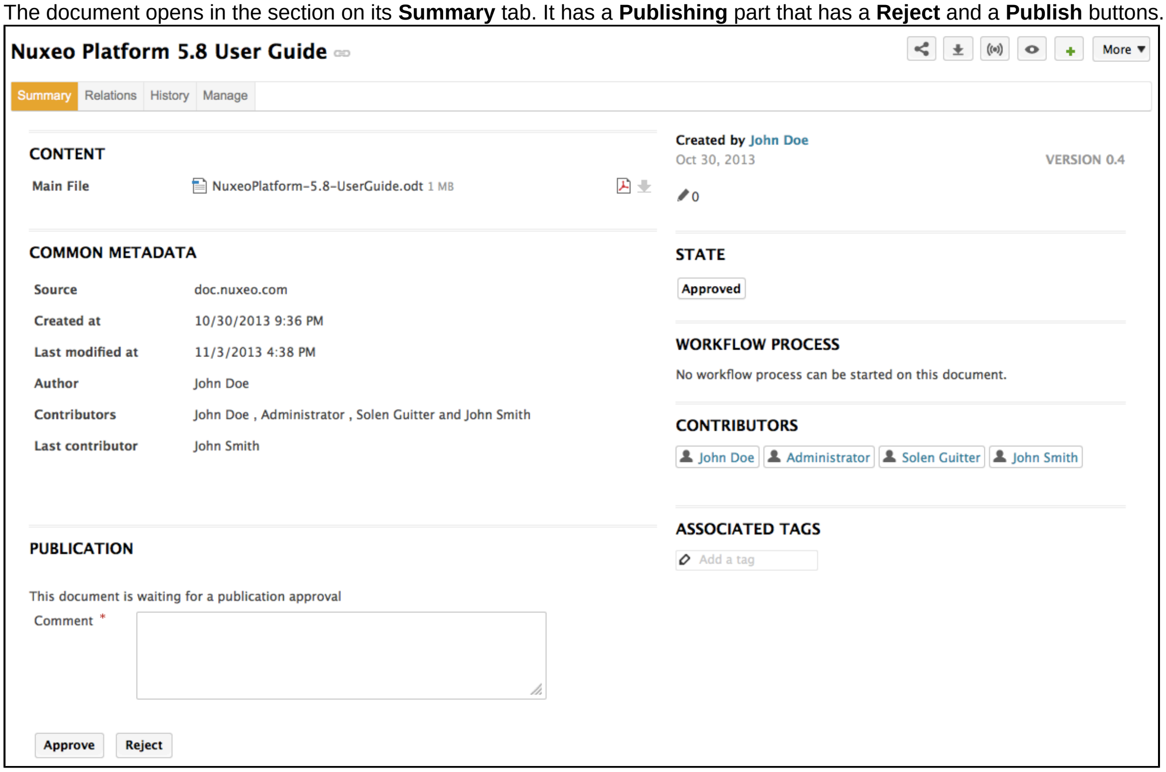
Approving Document Publishing

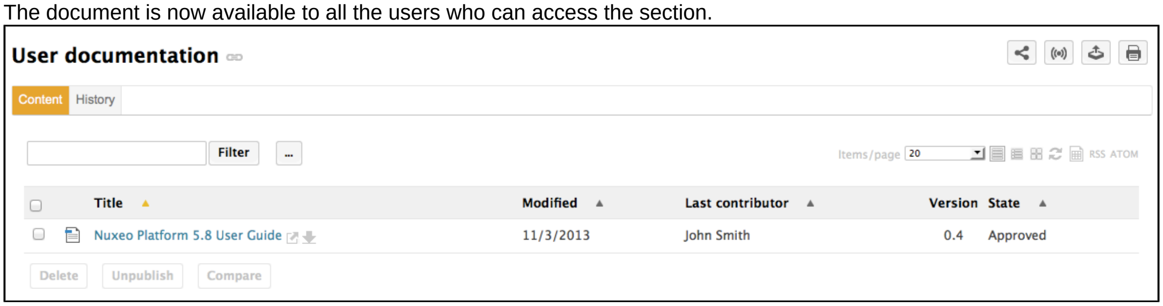
Users with write and management rights in the section can approve the publishing of a document.

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

To publish a document:

1. Click on the **Home** main tab.
   The **Dashboard** tab is automatically selected. 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 write or 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.
   

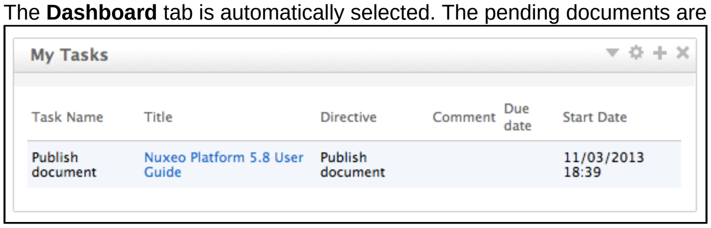
Rejecting Document Publishing

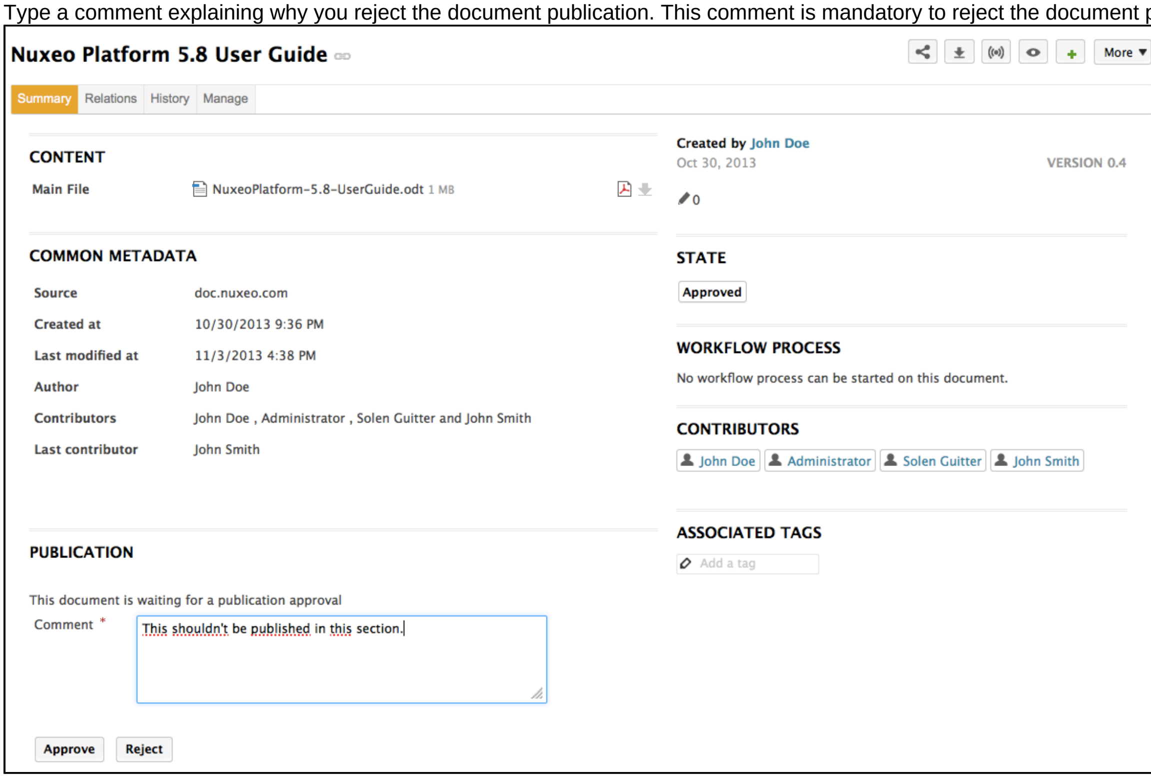
Only users with write and management rights in the section can reject the publishing of a document.

When a document is submitted to publication in your section, you must decide if it can be published in it. If you think that the document is not ready for publication or that it shouldn't be published in this section, you must reject it.

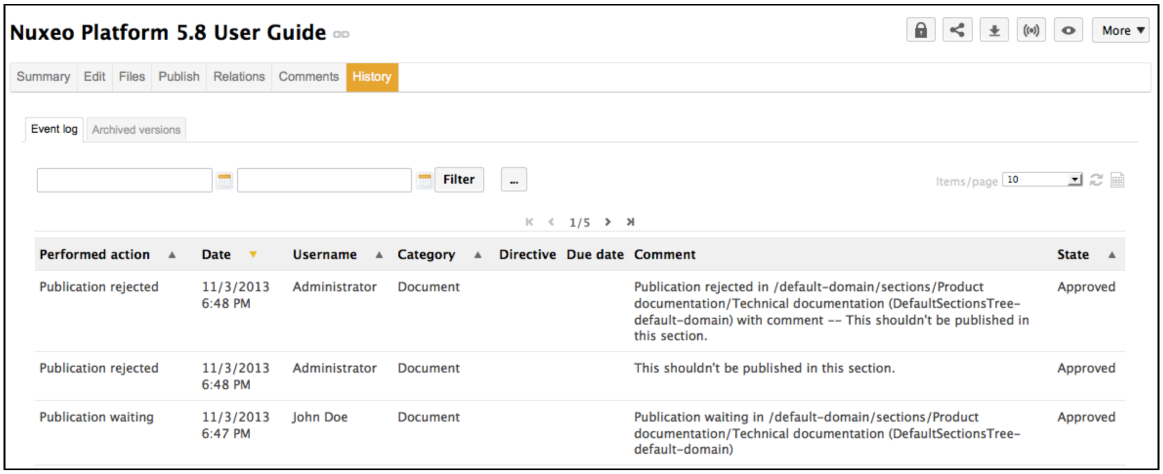
> Only users with write and management rights can see the pending document in the section.

To reject a document:

1. Click on the **Home** main tab.
The **Dashboard** tab is automatically selected. 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.



Republishing Documents

Since version 5.7.1, users with Write rights can easily publish a new version of a document that has already been published. Republishing is available after the published document has been edited, with or without version increment.

To republish a document:

1. In the workspace, open the document to republish.
2. Click on the **Publish** tab.
   The list of sections in which the document is published is displayed.
   A Republish button is displayed next to the Unpublish button.
3. Click on the **Republish** button corresponding to the section in which you want to publish a new version of the document.
   The latest version of the document is immediately available from the section. It replaced the previously published version in the section.

Unpublishing Documents

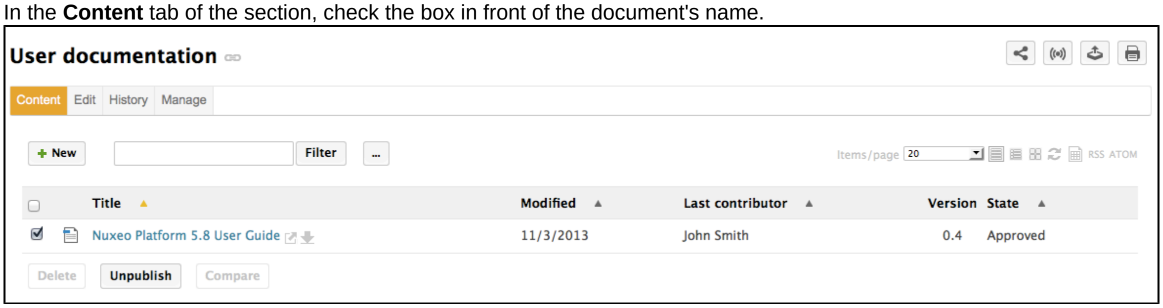
Only users with writing or management rights can unpublish a document from a section.

When a document is obsolete or inaccurate, it shouldn't be available in sections anymore. You have to unpublish it so section readers do not have access to the document.

Unpublishing a document deletes the document from the section, but it does not delete the workspace document.

To unpublish a document from a section:

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



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.

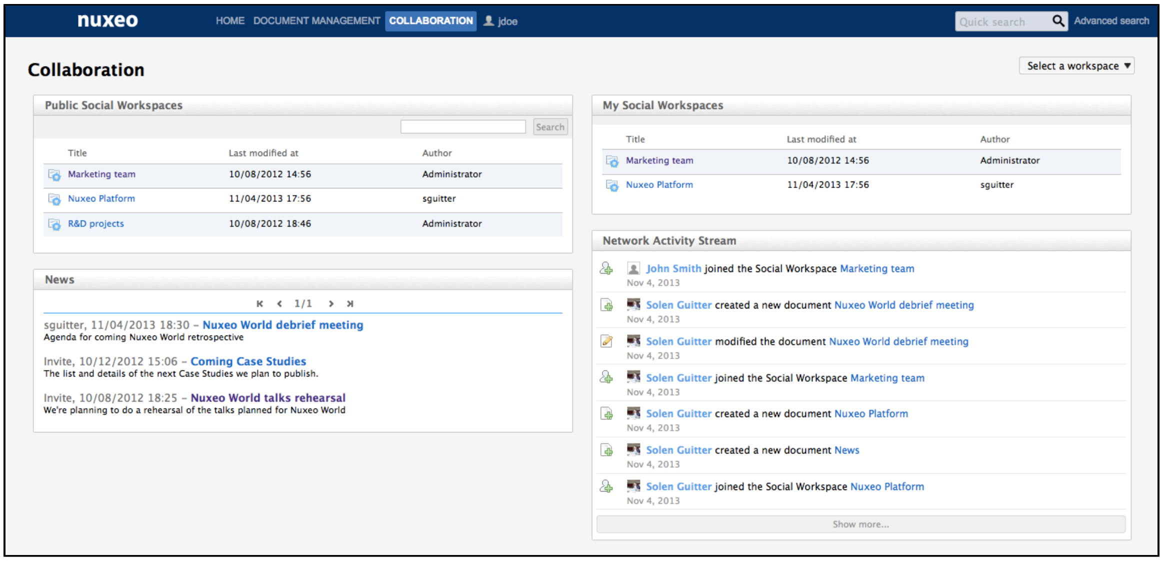
Social Collaboration

The Social Collaboration module is a user centric and subject centric view of your Nuxeo application, with extended collaboration and social features such as relations, activity stream, mini-messages, rich user profile, etc.

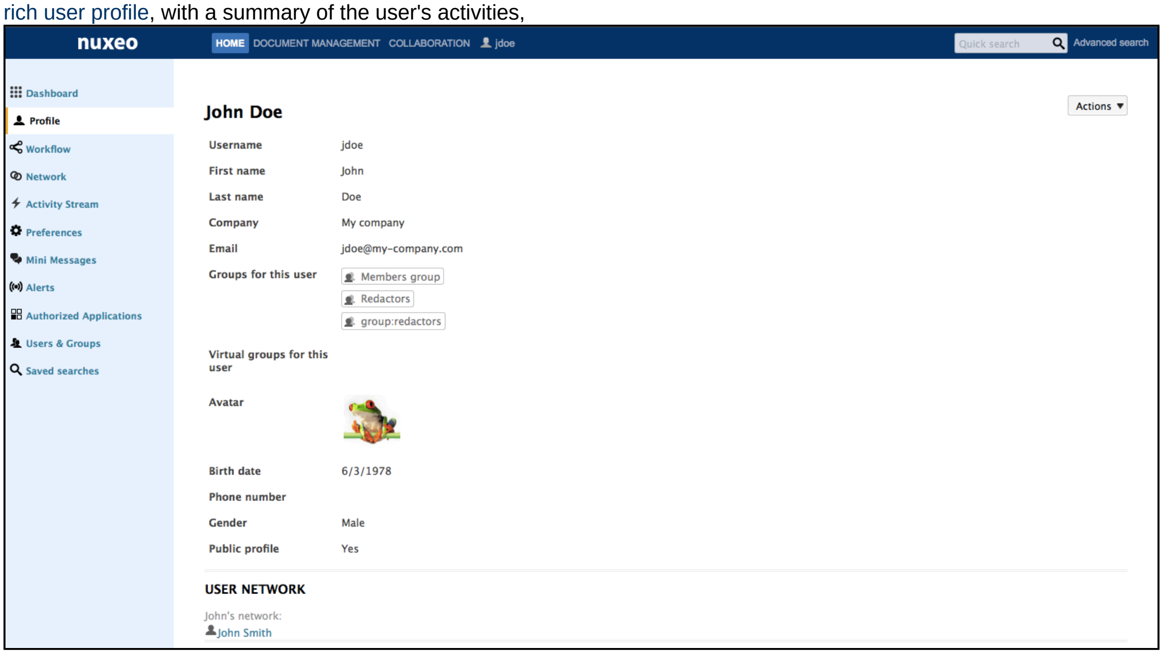
Social Collaboration is a module that you can decide to use or not, either when installing the Nuxeo Platform, or afterwards, using the Marketplace package.

The Social Collaboration module adds the following features to a document management application:

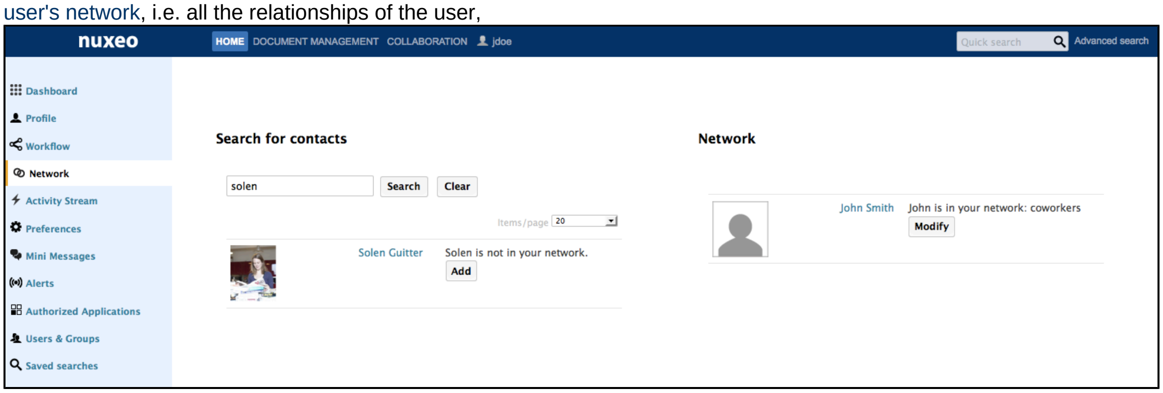
- social workspaces, with articles and news documents, a dedicated tab and new dashboards with social collaboration dedicated gadgets,



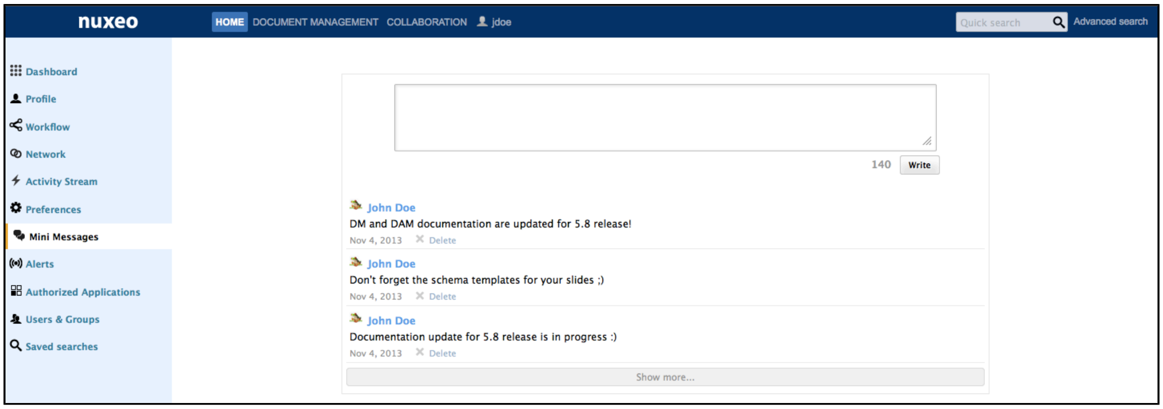
- rich user profile, with a summary of the user's activities,



- user's network, i.e. all the relationships of the user,



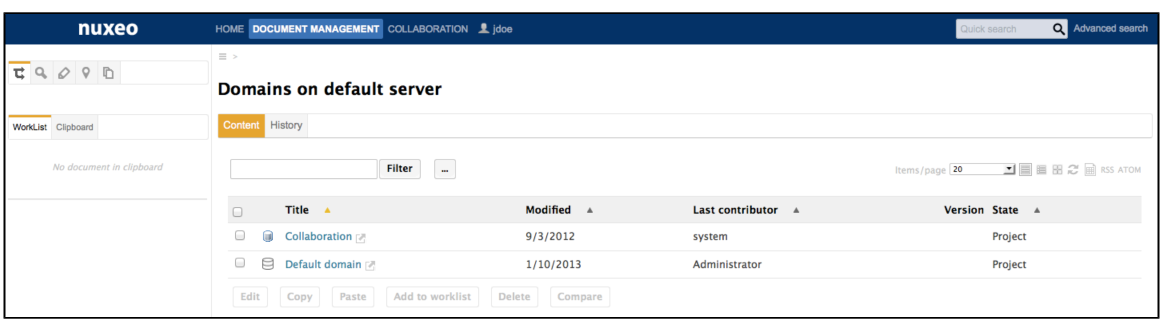
- mini-messages for micro-blogging, and



- activity streams, to follow what happens in the user's relationships and social workspaces.

In this User Guide

The Social Collaboration module adds a new tab to the Nuxeo Platform, called **Collaboration**, and a new domain, called Collaboration as well. The Social Collaboration module must be installed with the Document Management module, and can be installed with the Digital Asset Management module.



Social Workspaces Overview

Social workspaces are spaces that enable you to create content and share it to a community of users, using only the notion of private / public content.

Social workspaces have user friendly views of the content that enable users to access content simply and quickly and to share documents without having to understand all the hierarchical structure of the Nuxeo application. These views are dashboards that can be configured by the workspace administrators to be consistent with the workspace purpose and members.

On this page

Social Workspace Visibility

Social workspaces can be either private or public.

Public Workspace Overview

A public workspace is a space in which content can be shared to all users of the application, even if they are not members of the workspace. Indeed, the workspace can be seen in the workspaces directory by all users. If people are interested in the workspace's topics, they can ask to join the workspace to have access to more content.

Private Workspace Overview

A private workspace is a space in which content can only be accessed by workspace members. Users become members of the workspace when they are invited to the workspace. They cannot join the workspace at their own initiative.

Social Workspace Users

There are two types of users in a social workspace: members and administrators.

Members can:

- Create content (articles),
- Edit the workspace's content,
- Change the visibility of articles (public / private).

Beside members' actions, social workspace administrators can:

- Create news,
- Customize the workspace dashboards,
- Manage the members of the workspace (approve join requests, add / remove members...).

Browsing a Social Workspace

Social workspaces display content in a user-friendly way, independent from the usual hierarchical structure of Nuxeo, publication process, etc. This Collaboration view is available for social workspaces and the documents inside it. The workspace collaboration view uses dashboards, which are composed of gadgets that display content in a transparent way. The workspace's administrators can configure dashboards to display only the gadgets they think are relevant to the workspace and its users.

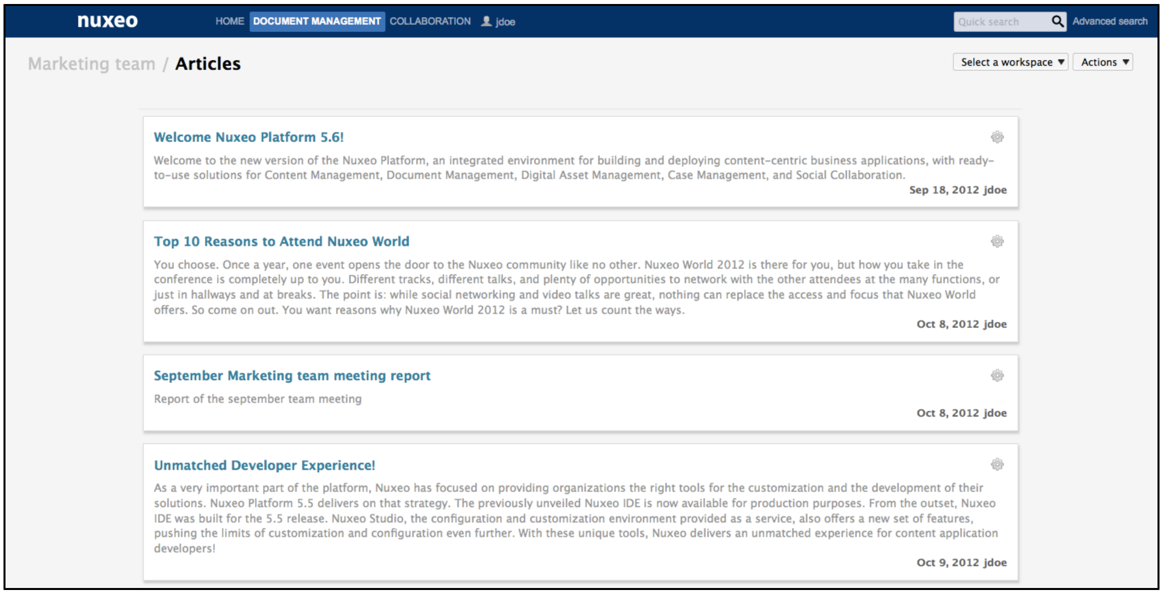
There are two social workspace dashboards:

- A public dashboard which is displayed to non-members,
- A private dashboard which is displayed to the members of the space.

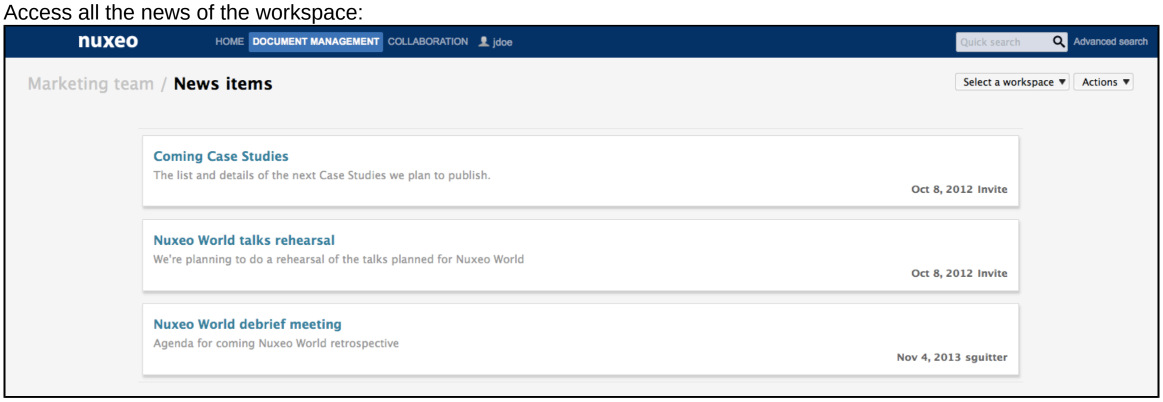
Workspace members also have access to a classic Document Management view of the workspace, from which they can access additional document management features such as comments.
You can go to the Document Management view from any Collaboration view by clicking the **Actions** button and then **Document Management view**. Conversely, you can access the Collaboration view of documents and social workspaces at anytime by clicking the icon .

In the Collaboration tab, you can easily browse content, without having to know where the content is in the collaboration structure. For instance, you can:

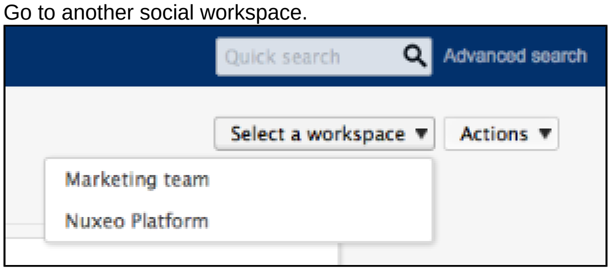
- Access all the articles of the social workspace:



- Access all the news of the workspace:



- Go to another social workspace.



The available actions are displayed on the top right corner of the social workspace view. You can:

- Select another social workspace (only the workspaces you're a member of are displayed),
- Create and edit content,
- Go to the articles of your social workspace,
- Go to the news of your social workspace.

Creating a New Social Workspace

Social workspaces can only be created in the Social domain added automatically by the system when you install the Social Collaboration module to your Nuxeo application.

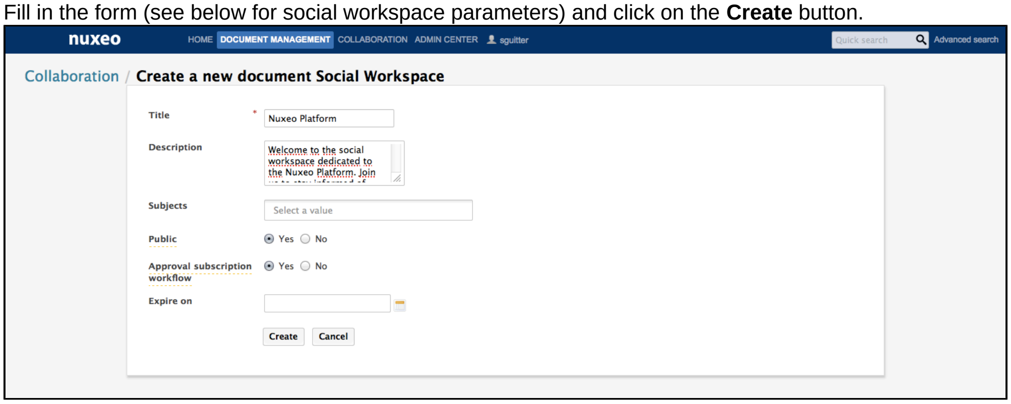
To be able to create a new social workspace

You can create a social workspace from:

- the Collaboration tab, from any social workspace's dashboard,
- the document management view of the social domain.

To create a new social workspace from the Collaboration tab:

1. Click on the **Actions** button, in the top right corner of the view.

2. Click on **Create a Social Workspace**.
   The social workspace creation form is displayed.
3. Fill in the form (see below for social workspace parameters) and click on the **Create** button.
   

   The workspace's **Wall** tab is displayed. You can then configure the workspace's dashboards.

To create a social workspace from the document management view of the application:

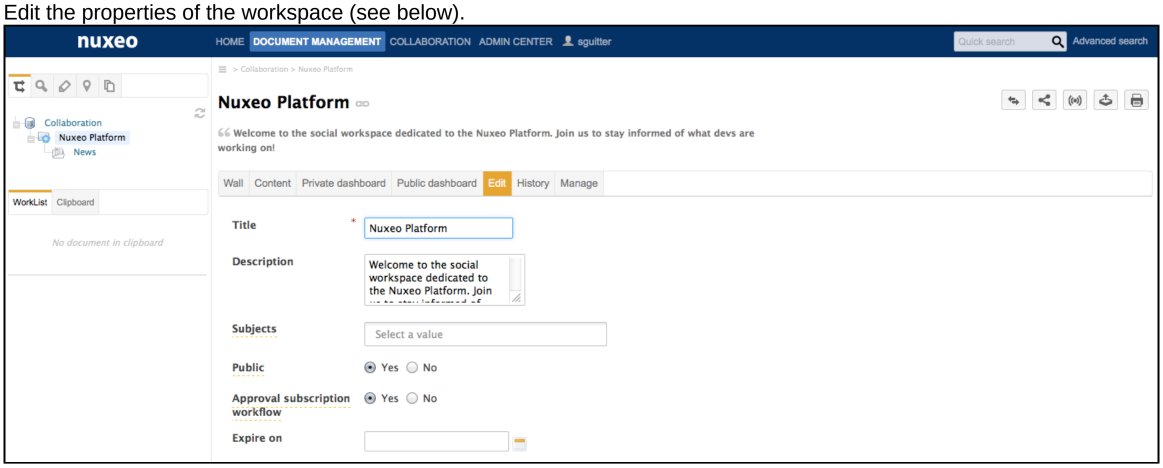
1. In the Social domain, click on the **New** button.
2. On the **Available document types** window, click on **Social Workspace**.
3. Fill in the social workspace creation form.
4. Click on **Create** button.
   The workspace's **Wall** tab is displayed. You can now configure the workspace's dashboards.

Field	Description
Title	Name of the social workspace.
Description	Text that explains what the social workspace is about.
Subject	Topic(s) of the social workspace.
Public	Indicate if the social workspace is public or private.
Approval subscription workflow	For public workspaces: indicates if join request should be approved by a workspace administrator or automatically.
Expire on	Date at which the social workspace can be closed by an administrator.

Editing a Social Workspace

Social workspaces can be editing from the document management view only.

To edit a social workspace:

1. If you're on the dashboard of the social workspace, click on the **Actions** button and then on **Document Management view**.
   The **Wall** tab of the social workspace is displayed.
2. Click on the **Edit** tab.
3. Edit the properties of the workspace (see below).
   

4. Optionally, type a comment indicating what you changed on the social workspace or why you edited it.

5. Click on **Save**.
 The modifications are saved.
 The **Wall** tab of the social workspace is displayed.

Field	Description
Title	Name of the social workspace.
Description	Text that explains what the social workspace is about.
Subject	Topic(s) of the social workspace.
Public	Indicate if the social workspace is public or private.
Approval subscription workflow	For public workspaces: indicates if join request should be approved by a workspace administrator or automatically.
Expire on	Date at which the social workspace can be closed by an administrator.

Adding Content to a Social Workspace

The members of a social workspace can create and edit content in the workspace.

The documents that can be create in a social workspaces are:

- Files,
- Articles,
- Events,
- Folders.

The administrators of the social workspace can also create News.

Articles are the main document type in social workspaces. All documents can be created either from the collaboration view or the document management view.

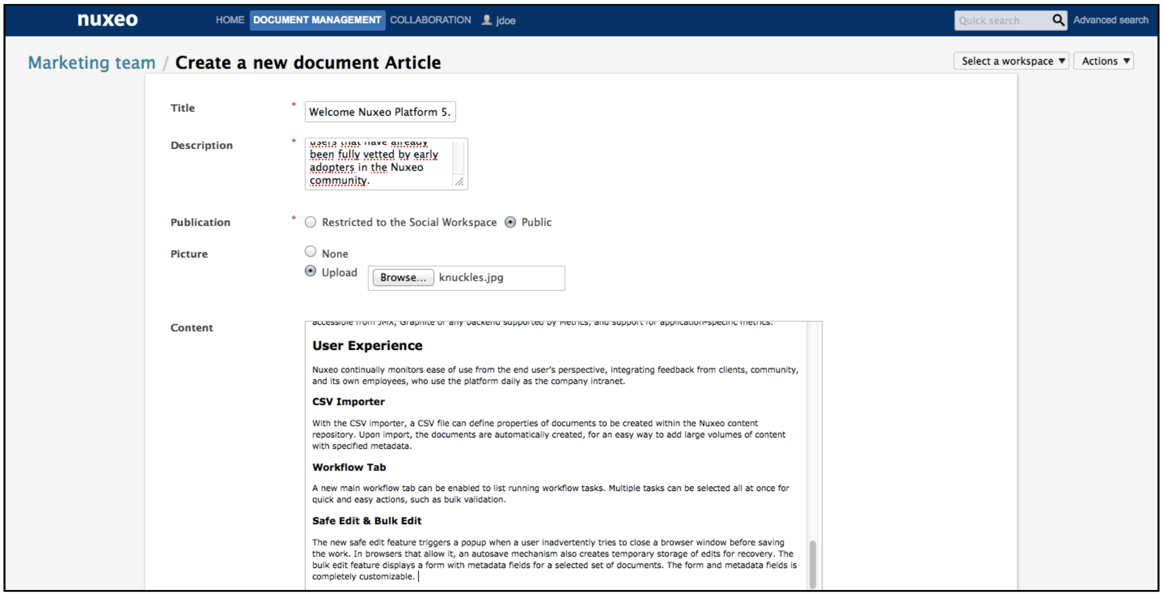
There are several ways to create articles:

- Using the complete creation form,
- Using the quick creation form the workspace's dashboard,
- Using the regular document management interface.

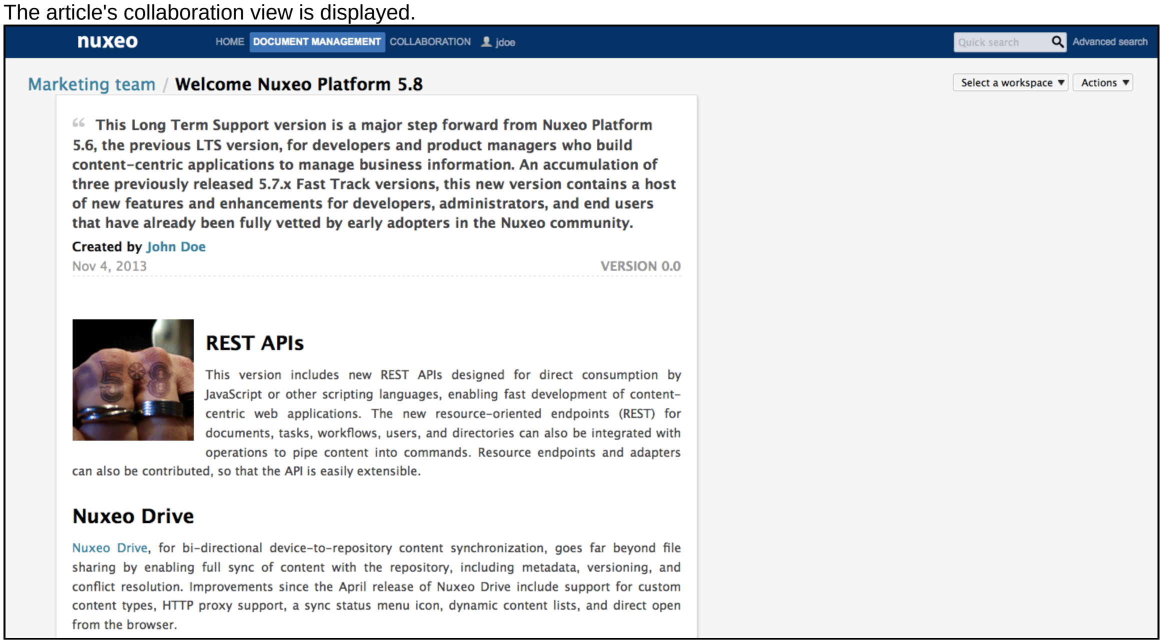
Initial versioning of documents in public social workspaces
In public social workspaces, documents created as public automatically go into version 0.1, since they are automatically published. Private documents are created in version 0.0.

To create an article using the complete form:

1. From the dashboard of the social workspace or an article, click on the **Actions** button.
2. Click on **Create an article**.
3. Fill in the article creation form (see below for article's properties).



4. Click on **Create**.
The article's collaboration view is displayed.



The same steps can be followed to create a file, by clicking **Create a file** from the **Actions** button

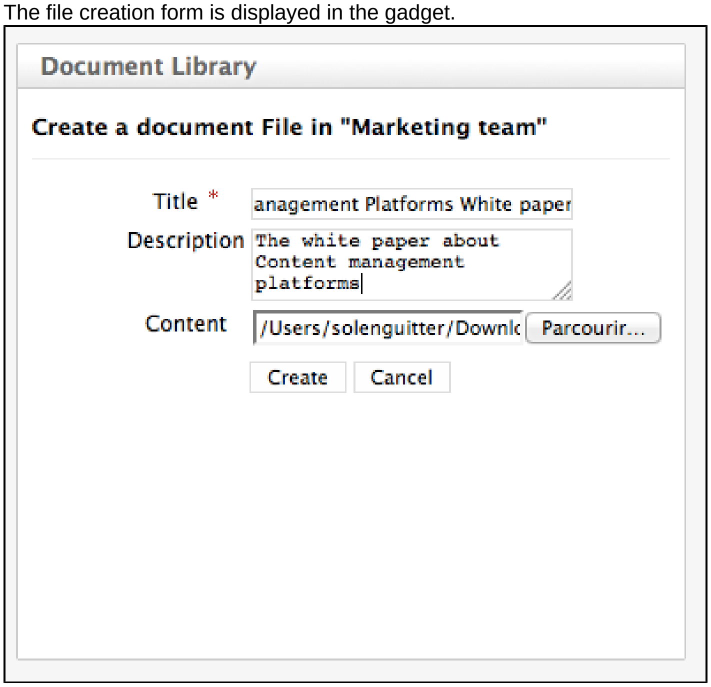
Article properties

Field	Field
Title	Name of the article
Description	Summary of the article. This description is displayed in the gadgets.
Publication	For public workspaces. Select who should see the article : only the space members (Restricted to the Social Workspace) or all users (public).
Picture	Upload an image to illustrate your article.
Content	Type the content of your article.
Format	Select which format should be used for the article.

To create a new document quickly from the dashboard:

Pre-requisite
The dashboard must display the **Document library** gadget.

This view is intented to facilitate the creation of files. However, you can follow the same steps to create Articles, Files or Folders.

1. On the dashboard's Document library gadget, click on the icon .
2. Click on **File**
   The file creation form is displayed in the gadget.
   

3. Fill in the title, description and content.
4. Click on the **Create** button.
   The file is created and displayed in the Document library gadget.
   By default, the file is private. You can edit the article to add a picture.

To create a new document in a social workspace, from the Document Management view:
From this view you can create all the social workspace authorized document types.

1. In the Document Management view, click on the **Collaboration** domain.
2. Click on the social workspace you want to create a new document in.
3. In the **Content** tab of the workspace, click on the **New** button.
4. On the window **Available document types**, click on the desired document.
5. Fill in the document's creation form.
6. Click on the **Create** button.
   The **Summary** tab of the document is displayed.

Editing Content in a Social Workspace

The workspace's members can edit the content of the workspace, even if they are not the author of the document.

When they edit a document, they can:

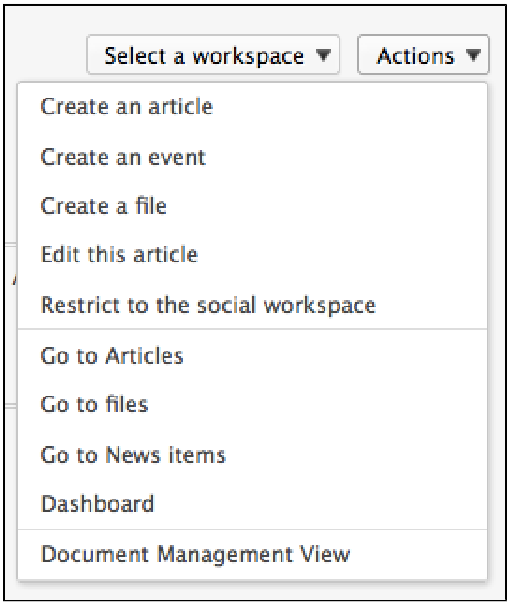
- change the content of the document,
- change the visibility of the document,
- fill in or edit its metadata,
- create a new version of the document.

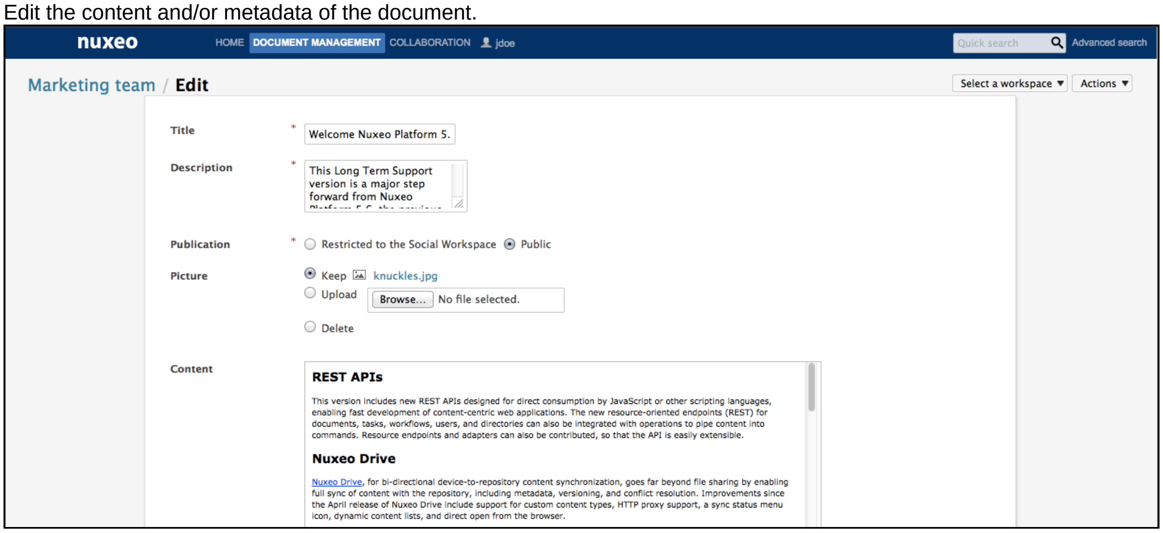
On this page

Editing the Document

When you edit the document, you can edit its content and its metadata. You can also indicate if the modified document should be saved as a new version of the document.

To edit a document:

1. When you consult the document, click on the **Actions** button.
2. Click on the **Edit** link.


The edit form is displayed.
3. Edit the content and/or metadata of the document.


4. Indicate if you want to update the document's version.
5. Click on the **Save** button.
The modifications are saved. The document is displayed.

You can also edit documents from the Document Management view.

Changing the Visibility of the Document

When you create a document, you decide if the document should be public, ie visible to all the users who can see workspace, or private, ie restricted to the workspace members. You can change this visibility at anytime. This can be done:

- from the **Document library** gadget on the workspace dashboard,
- from the collaboration view of the document,
- from the edition form of the document (for articles only).

To change the visibility of a document from the workspace dashboard:

Pre-requisite
The dashboard must display the **Document library** gadget to use the steps below.

- Click on the icon to make the document public.
- Click on the icon to make the document private.

To change the visibility when you consult the document:

1. Click on the **Actions** button.
2. Click on:
    - **Restrict to the Social Workspace** to make the document private,
    - **make it public** to make the document public.

Managing a Social Workspace

The administrators of the social space can:

- Manage the members of the space,
- Set up the social space dashboards,
- Share news to the workspace's members.

Managing the Workspace Users

Social workspaces can be either private or public.

On public workspaces, users can ask to join the workspace to have access to more content and share articles on the workspace. The workspace administrators must then validate these join requests.

On private workspace, users have no access to the workspace unless they are a member. As a consequence, they cannot ask to join it. Only the space administrators can add new members to the workspace.

The members management actions all take place in the Document Management view.

On this page

Adding Members to a Social Workspace

Administrators can add new members to a workspace on both public and private workspaces, at anytime.

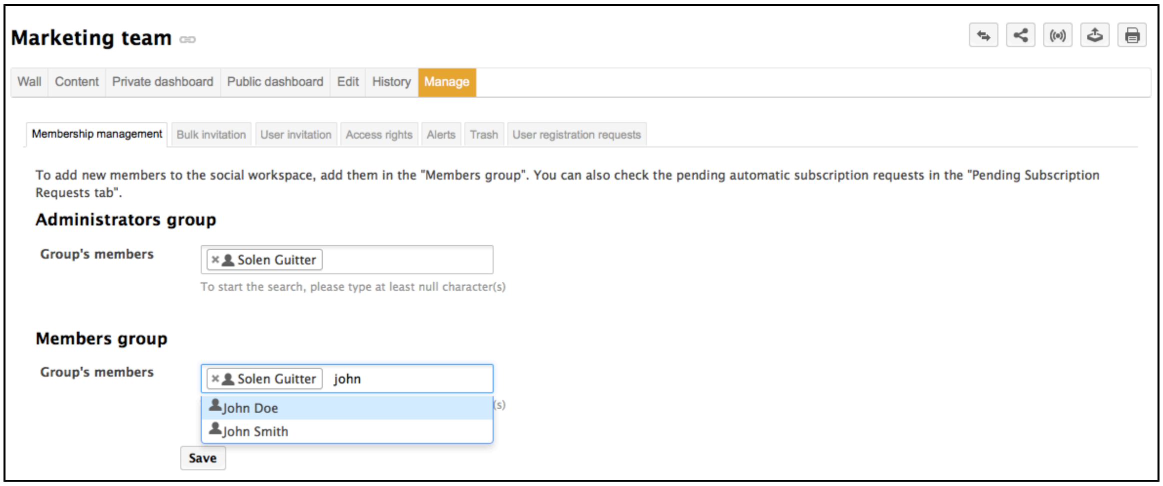
There are two ways to add new members to a social workspace:

- you can add users one by one,
- you can import several users using their email address.

Adding Members Individually

To add new members one by one:

1. On the Document Management view of the social workspace, click on the **Manage** tab.
   The **Membership Management** subtab is displayed.
2. In the Members group, type the name of the user you want to add.
   The names of the users corresponding to the typed characters are automatically displayed as you type.

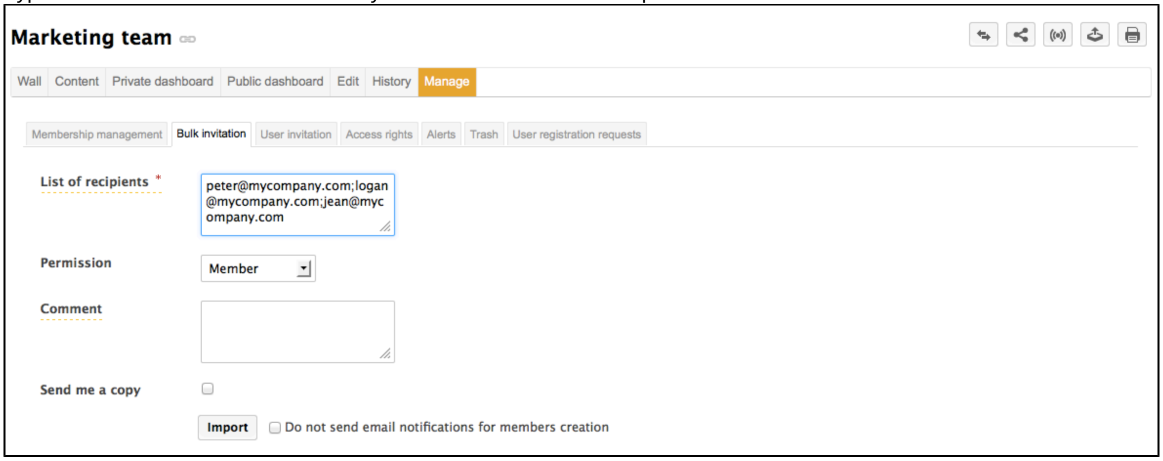


3. Click on the user you want to make a workspace member.
The user is added on the right of the search form.
4. Click on the **Save** button.
The user now sees the workspace displayed in his gadget **My social workspaces** and can add and edit content in the social workspace.
The other members of the workspace receive an email, informing them that new members have joined the workspace.

Adding Several Users Using Email Addresses

To add users using their email address:

1. On the Document Management view of the social workspace, click on the **Manage** tab.
The **Membership Management** subtab is displayed.
2. Click on the **Bulk invitation** tab.
3. Type the email addresses of the users you want to add to the workspace.

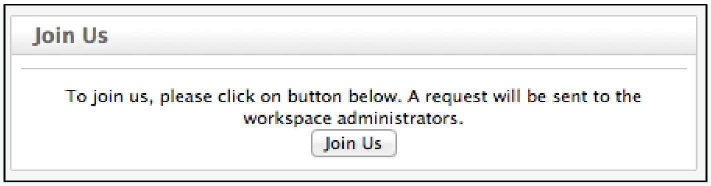


4. Select the permission you want to give to these users: member or administrator of the social workspace.
5. Optionally, type a comment that will be in the email sent to new members.
6. Check the box **Do not send email notifications for members creation** if you don't want user to be notified by email that you added them on the workspace.
7. Click on the **Import** button.
The users are added to the members of the workspace in the **Membership management** tab. The users now see the workspace displayed in their gadget **My social workspaces** and can add and edit content in the social workspace.
The other members of the workspace receive an email, informing them that new members have joined the workspace.

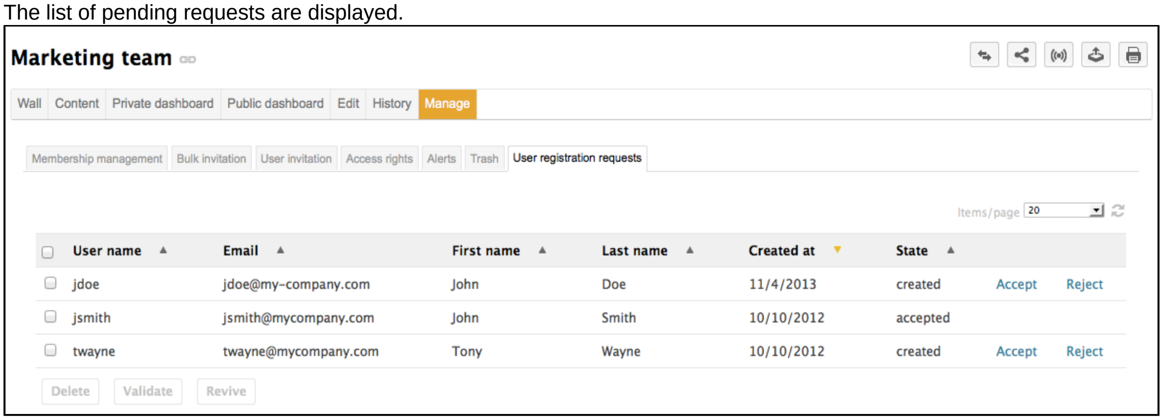
Managing Join Requests

On public workspaces, user can ask to join the workspace. If the social workspace has an approval subscription workflow enabled, the administrators of the workspace must approve the request so users actually become members of the workspace.

The public dashboard of the workspace must display the **Join Us** gadget to enable users to ask to join the workspace.



To process subscription requests:

1. On the Document Management view of the social workspace, click on the **Manage** tab.
   The **Membership Management** subtab is displayed.
2. Click on the **User registration requests**.
   The list of pending requests are displayed.
   

3. Check the box corresponding to the users whose request you want to process.
4. Click on the **Accept** or **Reject** links.
   The users are added to the members of the workspace in the **Membership management** tab. The users now see the workspace displayed in their gadget **My social workspaces** and can add and edit content in the social workspace.
   The other members of the workspace receive an email, informing them that new members have joined the workspace.

Setting the Workspace's Dashboards

The Social Collaboration module adds new dashboards to the user dashboard in the Home tab, which are specifically designed to enable the user to browse, create and share content without having to understand the hierarchical structure of the Nuxeo platform, the publishing process, etc.
The social collaboration dashboards are:

- The Collaboration root dashboard: the dashboard displayed when you click on the **Collaboration** tab. It gives an overview of the available content in the Collaboration part of the application. This dashboard can be customized by the application administrators.
- The social workspaces public dashboard: the dashboard that is displayed to non-members of public social workspaces. Its purpose is to enable sharing of public articles (using the **Public articles** gadget) so that users interested in joining the social workspace to access more content can ask to join (using the **Join Us** gadget). This dashboard can be customized by the social workspace administrators.
- The social workspaces private dashboard: the dashboard displayed only to the workspace members. It usually displays the **Document library** gadget which enables users to browse the content of the social workspace or search for content in the social workspace. This dashboard can be customized by the social workspace administrators.

The user Home dashboard is also automatically updated by the system to display some Collaboration gadgets and provide an overview of Collaboration activities (network mini-messages, your social workspaces, social workspaces news overview...).

On this page

Setting up Your Social Workspace Dashboards

Social workspaces come with default public and private dashboards. However, the administrators of the social workspace can customize the workspace's dashboards from the Document Management view, following the same steps as to customize their personal dashboard.

Setting up the Collaboration Domain Dashboard

The Collaboration domain also comes with a default dashboard, that the application's administrators can customize from the Collaboration view. They can change the dashboard layout, add or remove gadgets, move them just like they can on the user dashboard.

Working with News

News items are articles that enable the social workspace administrators to share information to the workspace's members. The news items are displayed in a dedicated gadget, that can be used in both social workspace dashboards, and in the user's home dashboard. Like articles, news items can be either private (visible to the space members only) or public (visible to all users).

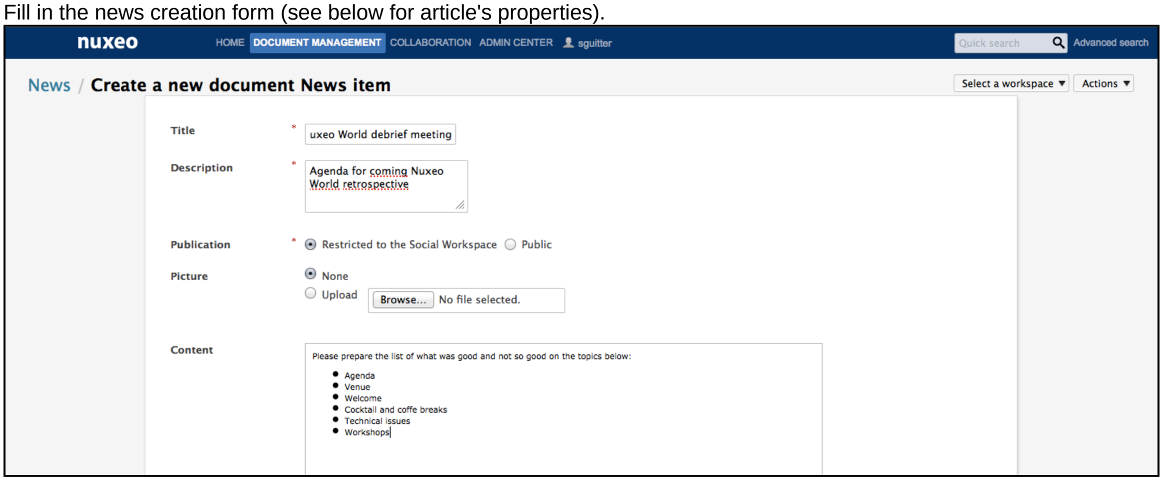
News are automatically displayed on the different dashboards of users, providing that they display the **News** gadget:

- The Home dashboard displays the news of all the social workspaces users can access,
- The Collaboration home dashboard displays the news of all the social workspaces users can access,
- The social workspaces dashboard display the news of the workspace only.

News items can only be created by the workspace administrators.
They can be created from:

- From any page in the Collaboration view using the Actions menu,
- From the workspace dashboard using the **Document Library** gadget,
- From the Document Management view.

To create a news item from any page:

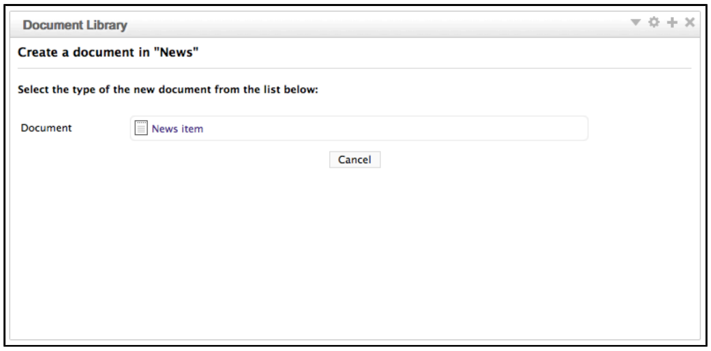
1. From the dashboard of the social workspace, an article or a news item, click on the **Actions** button.
2. Click on **Create a news item**.
3. Fill in the news creation form (see below for article's properties).


4. Click on **Create**.
   The news is created in the News item container. The news collaboration view is displayed.

To create a news item quickly from the dashboard:

> **Pre-requisite**
> The dashboard must display the Document library gadget.

1. On the dashboard's Document library gadget, go in the **News** folder.
2. Click on the icon .
3. Click on **News item**.



The news item creation form is displayed in the gadget.
4. Fill in the title, description and content.
5. Click on the **Create** button.
The news item is created and displayed in the Document library gadget.
By default, the news item is private. You can edit it to add a picture.

To create a News item from the Document Management view:

1. In the **Document Management** view, click on the **Collaboration** domain.
2. Click on the social workspace you want to create a news item in.
3. In the social workspace, click on the **News** folder.
4. Click on the **Create a News Item** button.
5. Fill in the document's creation form.
6. Click on the **Create** button.
7. The **Summary** tab of the news item is displayed.

News items properties

Field	Description
Title	Name of the news item
Description	Summary of the news item. This description is displayed in the News gadget.
Publication	For public workspaces. Select who should see the news item : only the space members (Restricted to the Social Workspace) or all users (public).
Picture	Upload an image to illustrate your news item.
Content	Type the content of your news item.
Format	Select which format should be used for the news item.

Rich User Profile Overview

The Social Collaboration module brings rich features to the user's profile.

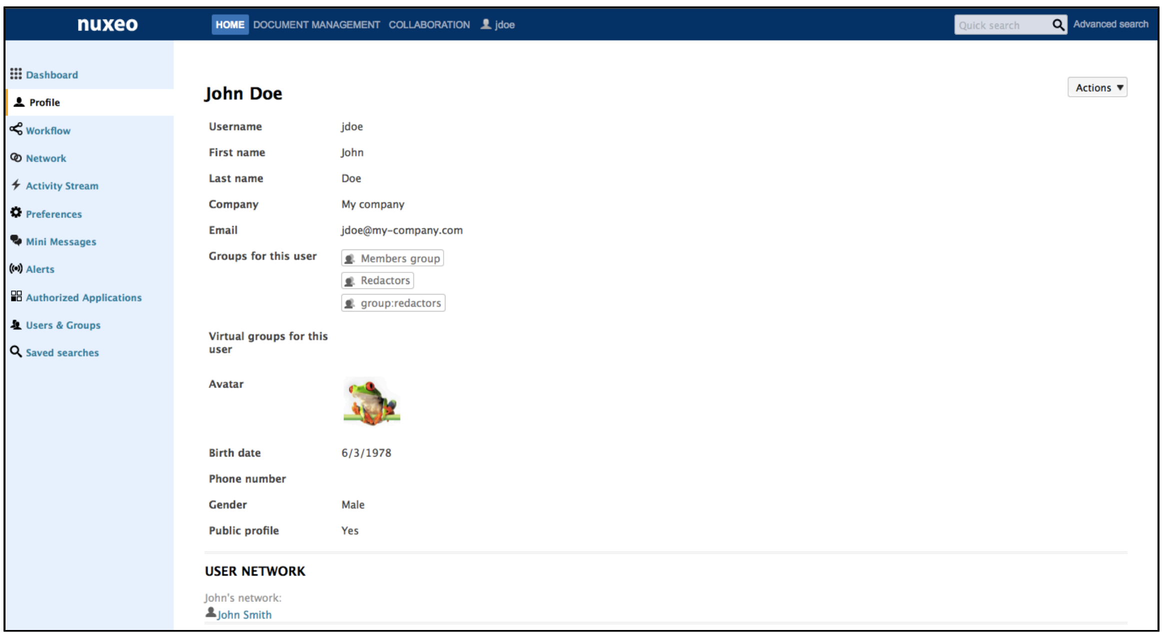
The default user information is:

Field	Description
Username	The name the user will use to log in.
First name	First name of the user
Last name	Last name of the user
Company	Company or organization of the user
Email	email of the user This address is used for alerts.
Password	User's password
Password (Verify)	User's password

Groups for this user	Groups of which the user is a member. User must be at least in 'administrators' or 'members' group, or one of their sub-groups.
Virtual groups for this user	
Avatar	Image that represents the user in the application.
Birth date	User's birth date
Phone number	User's phone number
Gender	User's gender. Default value is Male.
Public profile	Visibility of the information about the user. By default, profiles are public.

The social collaboration user information is:

- The user's network,
- The user's activity stream,
- The user's mini-messages.



Network Overview

The Social Collaboration module provide a social network features. Users can add and remove other users of the application from their friends or coworkers network.

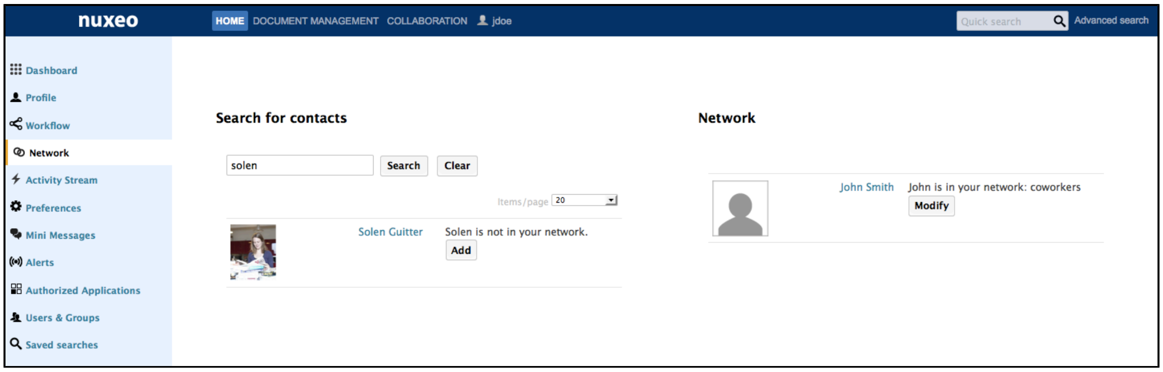
Adding users to your network enables you to easily follow their activities from your dashboard:

- using the **Mini Message** gadget, you can see their mini messages,
- using the **Network activity stream** gadget, you can see what social workspace they join, who they add to their own network, what documents they work on, etc.

There are two network groups: friends and coworkers. You can add users in one or both network groups. There is no functional difference between these two groups.

To add new users to your network:

1. In your Home, click on the **Network** tab.
   The page is divided in two parts:
   - the left part enables you to search the users you want to add to your network,
   - the right part displays your network's members.
2. Type the name of the user you want to add to your network.
   The names of the users corresponding to the typed characters are automatically displayed as you type.



3. Click on the **Add** button and check the box corresponding to the network group you want to add the user into.

> Optionally you can click on the user's name to consult his profile before adding him to your network.

The user is now in your network: he is displayed in the right part of the **Network** tab and in the Network part of your profile.
You can remove the user from your network at anytime.

To remove a user from your network:

1. In your Home, go your profile.
2. In the right Network part, click on the user you want to remove from your network.
   The user's profile is displayed.
3. In the User network part of the profile, click on the **Modify** button.
4. Uncheck the network group box the user is in.
   The user is immediately removed from your network.

Mini Messages Overview

The Social Collaboration module adds a micro-blogging feature, enabling users to share 140 character mini messages.

Mini messages are public and accessible from different places.

- from your profile: users consulting your profile can see your mini messages, even if your profile is private;
- from the user's dashboard: if the user displays the **Mini Messages** gadget on his dashboard and you are in his network, your mini messages are displayed on his dashboard;
- the social workspace's dashboards: if the dashboard (either public or private) displays the **So cial workspace mini message**, users that can access the dashboard can see your mini messages.

You can post new mini message from different places:

- from your Home,
- from the dashboards gadgets.

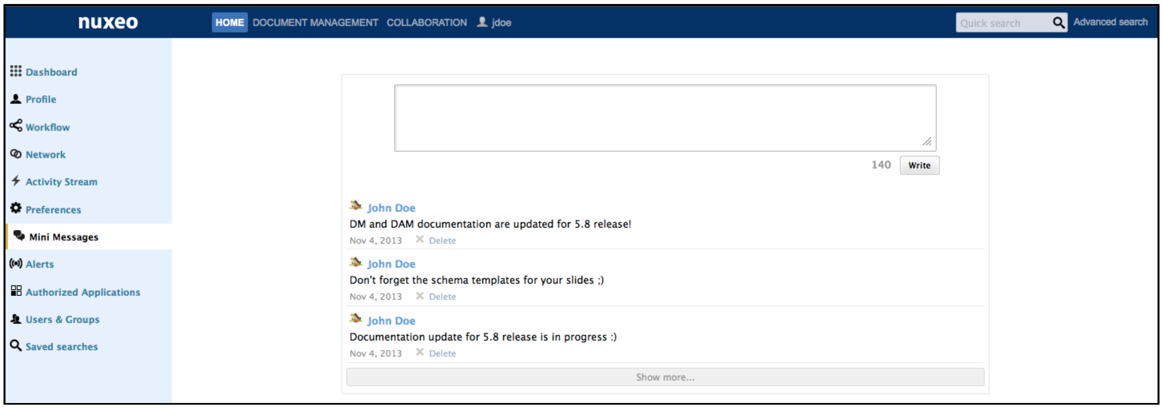
> Mini messages cannot be edited.

On this page

Adding a New Mini Message

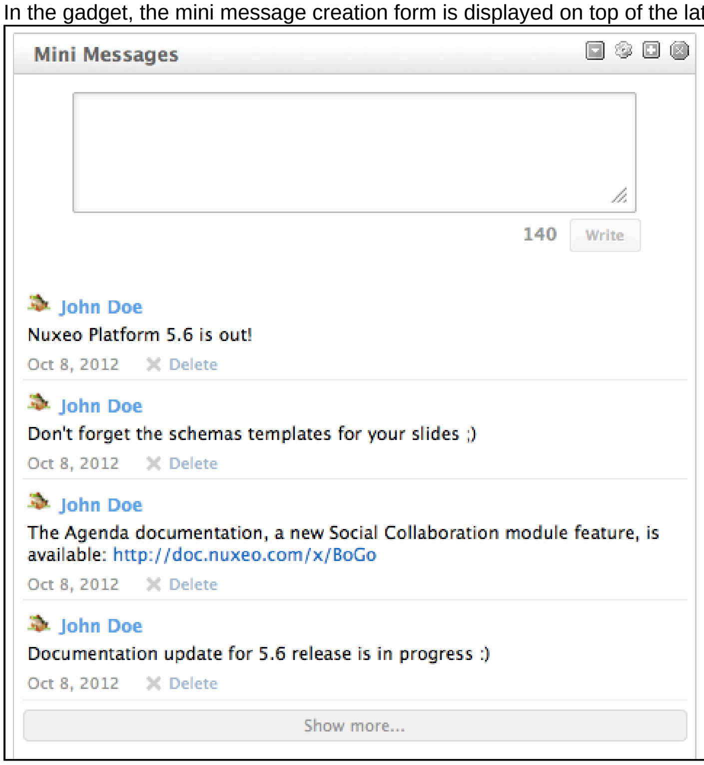
To add a mini message from your Home:
From your home you can post new mini messages from your dashboard if it displays the **Min Messages** gadget, or from the **Mini Messages** tab.

1. In your Home, click on the **Mini Messages** tab.
   Your latest mini messages and those of people in your network are displayed, with a form to add a mini message on top.



2. Type your message in the text area.
   As you type, the number of characters left is updated.
3. Click on the **Write** button.
   The message is saved and displayed under the text area. It is also available in the Mini Messages gadgets of your networks' members' and social workspaces' dashboards.

To add a mini message from a Mini Message gadget:
In the gadget, the mini message creation form is displayed on top of the latest mini messages.



1. Type your message in the text area.
   As you type, the number of characters left is updated.
2. Click on the **Write** button.
   The message is saved and displayed in the gadget. It is also available in the Mini Messages gadgets of your networks' members' and social workspaces' dashboards.

Deleting a Mini Message

Only the author of a mini message can delete it.
Mini messages can be deleted from the Home's **Mini Messages** or the **Profile** tab.

To delete a mini message:

1. In your Home, click on the **Profile** tab.
   Your latest mini message are displayed in the Mini Messages gadget.
2. Click on the **Delete** link displayed in the bottom right corner of the mini-message you want to remove.
   A confirmation window pops up.
3. Click on the **OK** button.

The mini message is immediately deleted and is not available anymore in the Mini Messages gadgets.

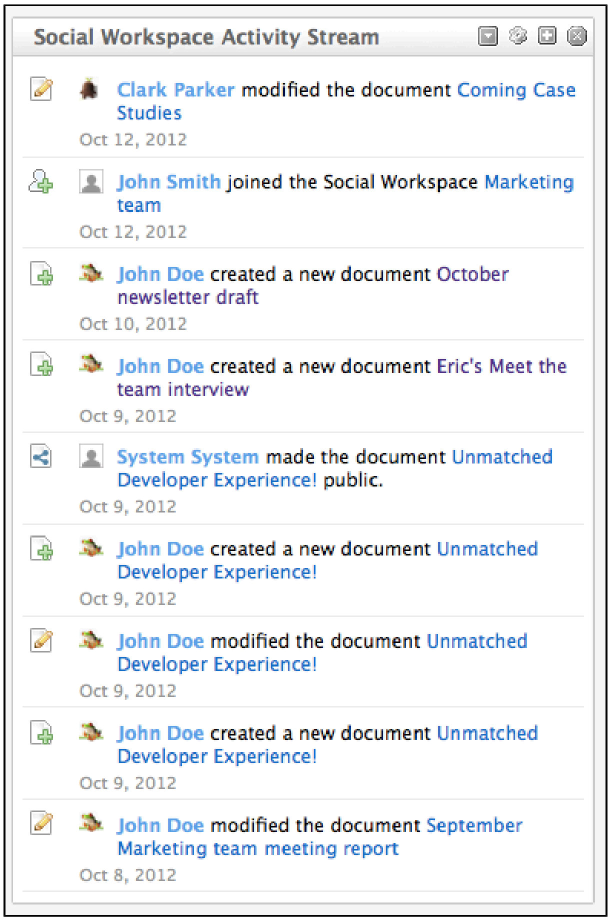
Activity Stream Overview

Activity streams are feeds that display the latest events done by users. There are three activity streams:

- Social Workspace Activity Stream
- User's Activity Stream
- User's Network Activity Stream

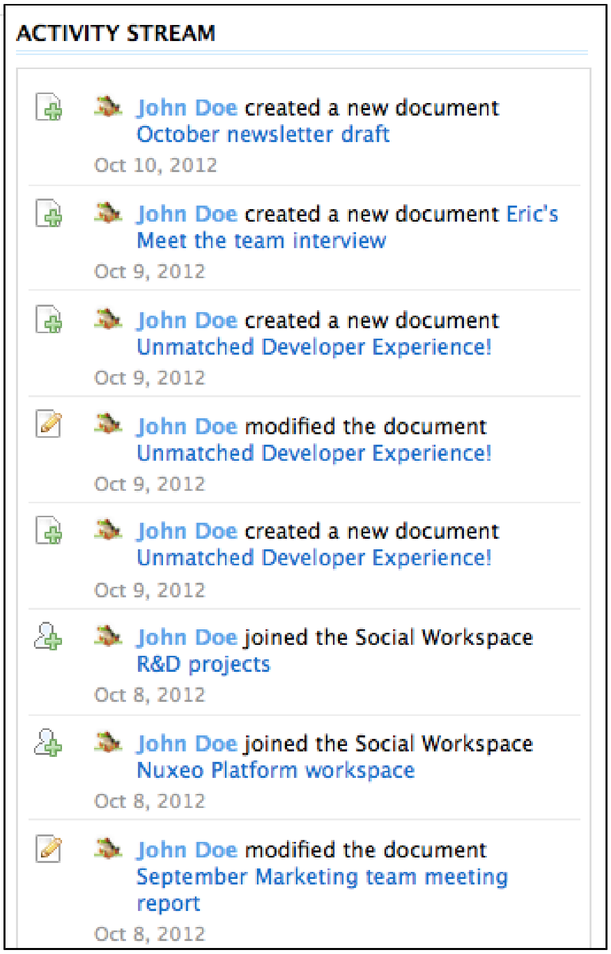
Social Workspace Activity Stream

The social workspace activity stream displays the latests events that occurred in the social workspace.
It can be displayed on the social workspace's activity dashboards only.



User's Activity Stream

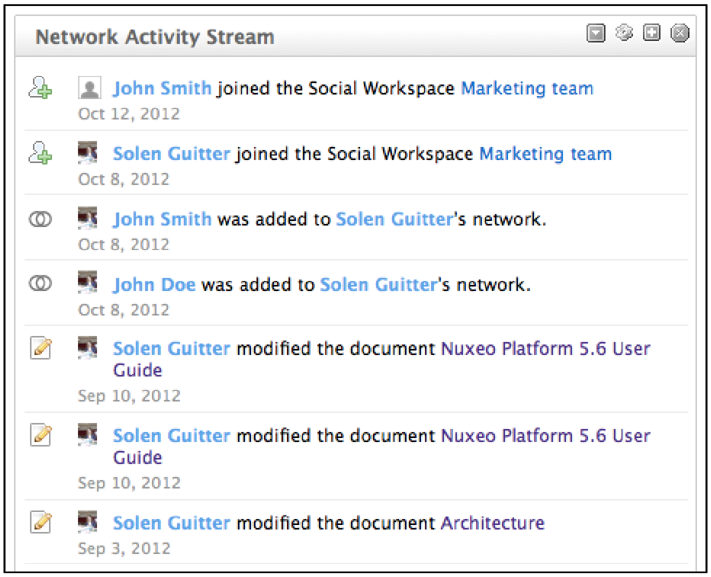
The user's activity stream displayed the latest actions done by the user.
It is displayed on the user's profile only.



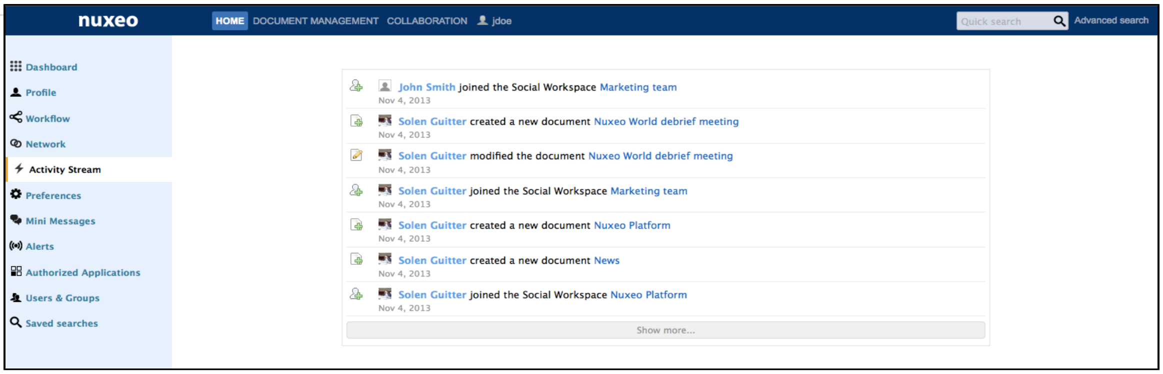
User's Network Activity Stream

The user's network activity stream displays information about what your network members do on the application:

- which workspaces they join,
- what documents they work on (in social workspaces and in the document management area of the application),
- who they add to their network.



The network activity stream can be displayed on the user's dashboard and the Collaboration home dashboard, using the **Network Activity Stream** gadget in the **Nuxeo** category. It is also displayed on the Activity Stream tab of the user Home.



Agenda Overview

Coming by default with the Social Collaboration module is an agenda feature. This feature enables users to create events that will be displayed to users in a dedicated agenda gadget on the different dashboards. As soon as a user can access the workspace or folder in which the event has been created, he can see the event in the agenda gadget.

Creating Events

Events can be created in workspaces, social workspaces and folders.

In social workspace, events can be created from the **Content** tab of the social workspace in the Document Management view, or from the Collaboration view of the social workspace.

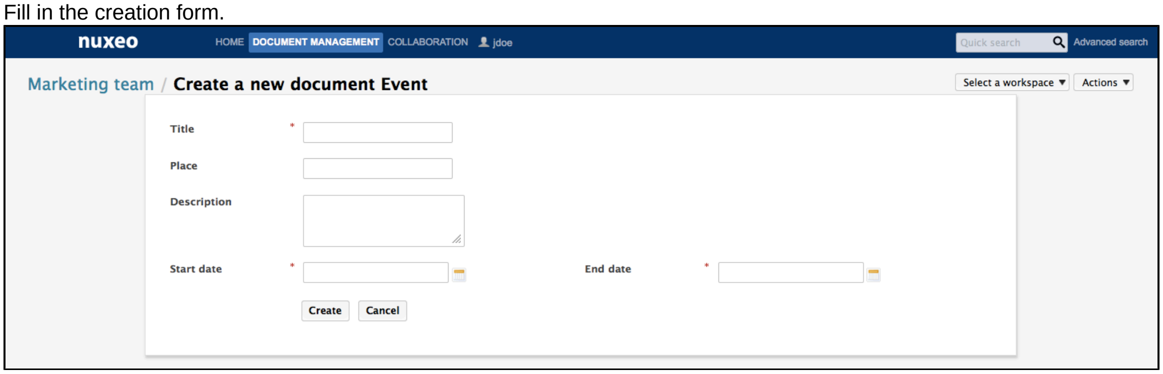
On this page

To create an event from the Content tab of the workspace:

1. In the **Content** tab of the workspace, click on the **New** 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.

To create an event from the Collaboration view of the workspace:

1. Click on the **Actions** button in the top right corner.
2. Click on **Create an event**.
3. Fill in the creation form.

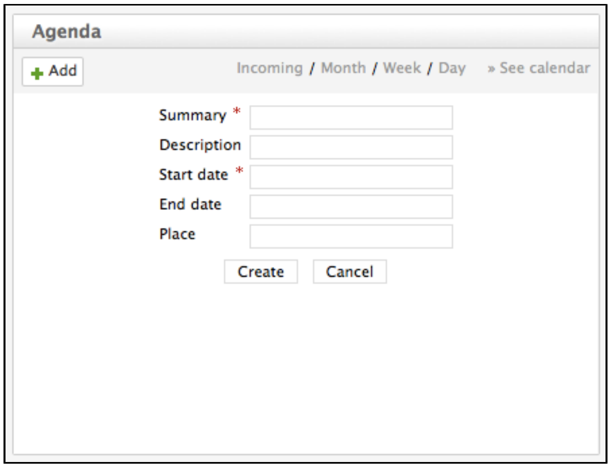


4. Click on **Create**.
   The **Summary** tab of the event is displayed, in the Document Management view of the social workspace.
   The event is now available in the **Agenda** gadget.

To create an event from the Agenda Gadget:

> **Pre-requisite**
> The Agenda gadget must be displayed on the dashboard.

In the Agenda gadget, events can be created from the list view only.

1. On the Agenda gadget, click on the **Add** button.
2. Fill in the event creation form.


3. Click on the **Create** button.
The event is displayed in the list of the Incoming events.

Events properties

Field	Description
Title	Name of the event
Description	What the event is about
Start date	Date and time at which the event starts
End date	Date and time at which the event ends
Place	Where the event takes place

Editing an Event

Events can be modified from the **Edit** tab. Unlike other documents, they don't have additional metadata from this tab, and users cannot choose to create a new version of the event when they edit it. The system automatically creates a new version of the event when it is modified.

To modify the event:

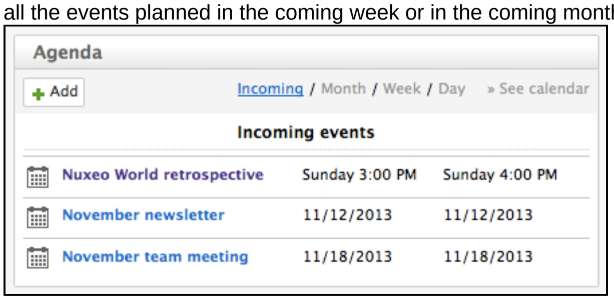
1. Click on the **Edit** tab of the event.
2. Modify the event's properties you want.
3. Click on **Save**.
The modifications are immediately available in the **Agenda** gadget. A new version of the event is automatically created by the system.

Browsing Events

Events are displayed in the **Agenda** gadget. The gadget displays only the events relevant in the dashboard on which it is displayed:

- on the Home dashboard, you can see all the events you have access to;
- on a social workspace dashboard, you can see only the events in the social workspace.
Events are also displayed in the **Content** tab of workspaces and folders, like any other document.

The gadget offers two views of the events list.

- The list view shows the events as a list. By default, it displays all the coming events, but you can choose to display on the day's events, all the events planned in the coming week or in the coming month. Click on **Day**, **Month**, **Week** or **Incoming** to change the list filter.


- The Calendar view shows the events in a calendar. By default, the calendar shows a month calendar by default, but you can display only one week or one day. Click on **Day**, **Month**, **Week** to change the calendar view.

To see the details of an event, click on the event's title from the Agenda gadget or from the **Content** tab of the workspace or folder. The event's **S ummary** tab is displayed. You can then edit it, link it to other documents, comment it and tag it.

Actions Available on Events

The features below are available on events:

- Relations
- Comments
- Tags

Like Overview

The Like feature enables users to vote for documents using a like / unlike system. The rating of the document is displayed on its Summary tab.

The Like feature is included by default in the Social Collaboration and Digital Asset Management modules. A dedicated gadget comes with Social Collaboration to enable users to see the most popular documents, providing another way to find documents.

On this page:

Users can like documents, messages and activities.
For message and activities likes, see the Wall Overview page.

Voting for a Document

Users need the **Read** right to vote for a document. They can vote for documents from the document's Summary tab or from the Document Library gadget in social workspaces.

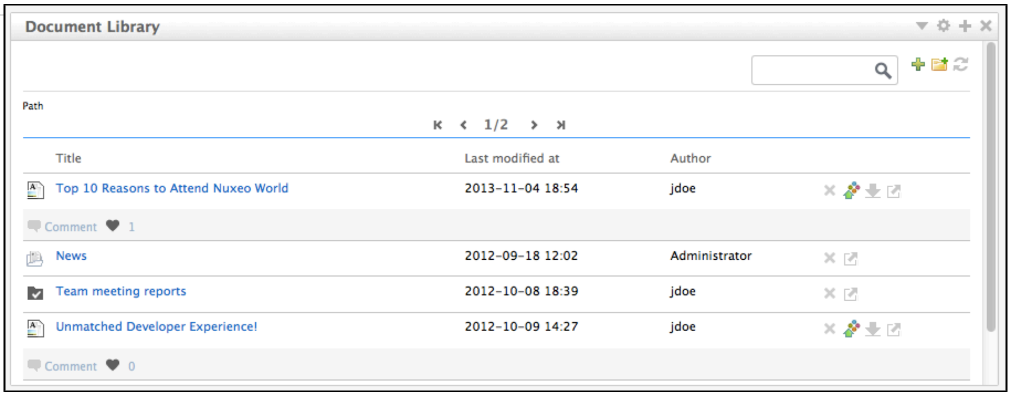
To vote for a document from the Summary tab:

Click on the icon .

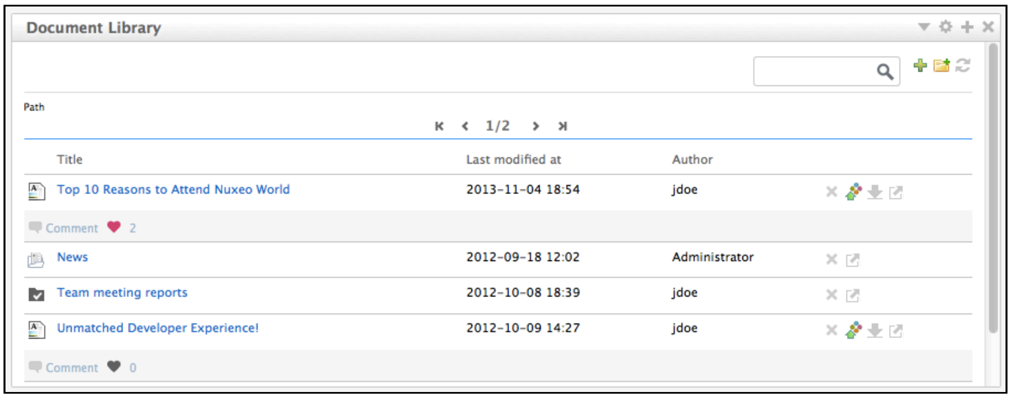
Your vote is added to the current document rating. The icon becomes .

To vote for a document from the Document Library gadget:

Click on the icon displayed below the document in the gadget.



Your vote is added to the current document rating. The icon becomes .



Voting against a Document

It is not possible to vote against a document. Users can only unlike the documents they have voted for, by following the same steps as to vote for a document. Clicking removes their vote from the document's rating.

Wall Overview

Social workspaces have a special view that enables users to directly see what is happening in the workspace: what documents are created or modified and by who, who joins the social workspace, who added a mini message, etc.

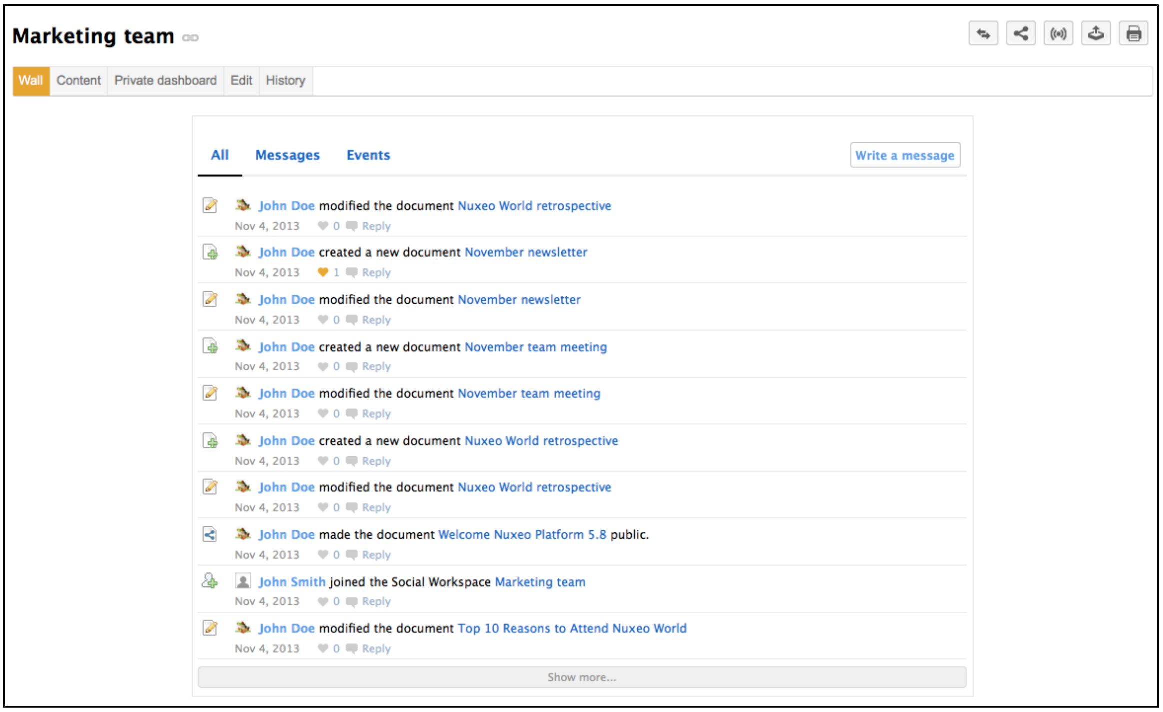
The Wall is available on social workspaces only and only members of the workspace can access it.

Browsing a Workspace Wall

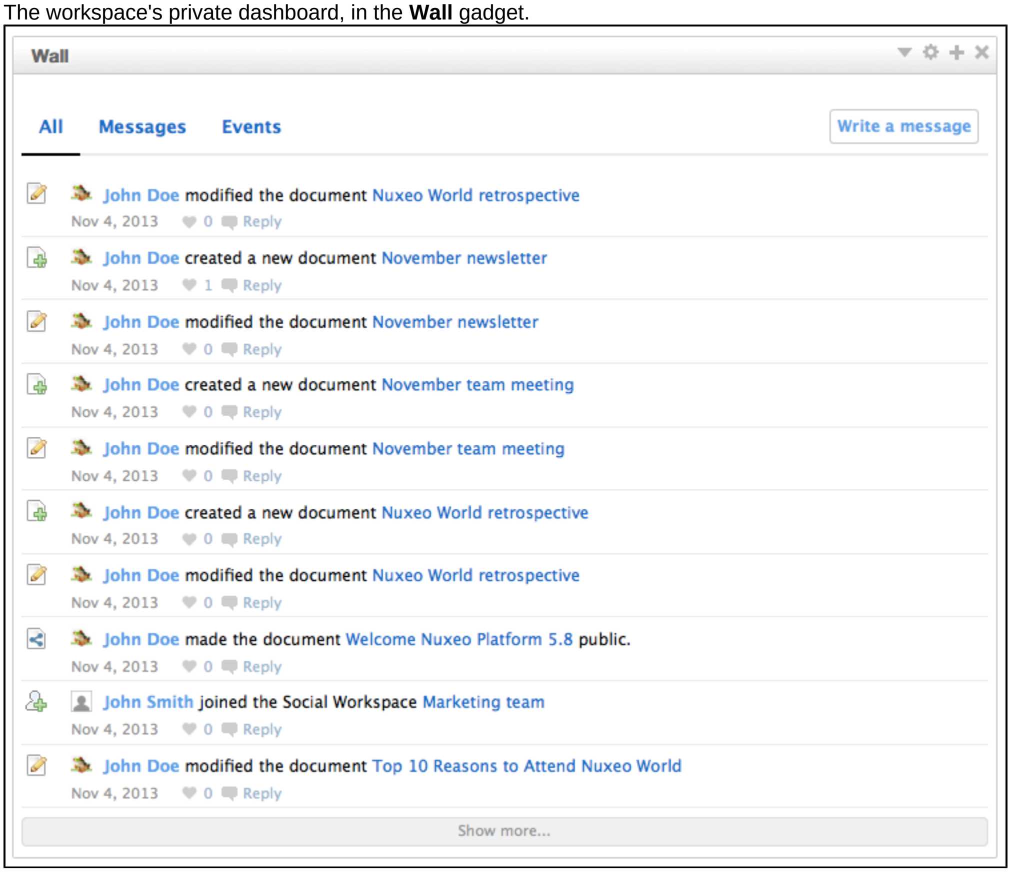
The wall is available from:

On this page

- The Document Management view of the social workspace, in the **Wall** tab,



- The workspace's private dashboard, in the **Wall** gadget.



Both display the same pieces of information: the events that take place in the social workspace and the messages that are posted in the workspace. By default, the Wall displays all these information, grouped under the **All** item.
To make it easier to see the activities, click on **Events**. Only the activities are displayed.
To see only the mini-messages posted in the workspace, click on **Messages**. Only the mini-messages posted either from the Wall or from the **Mini messages** gadget are displayed.

Writing a Message

Users can post mini messages from the wall directly.

To post a mini message from the wall:

1. On the wall, click on the **Write a message** button.
   A text area is displayed on top of the Wall content, just below the wall tabs.
2. Type your text and click on the **Write** button.
   The message is now displayed in the **All** and **Messages** tabs of the Wall.
   The message is also displayed in the Mini messages gadget of the social workspace.

Commenting Activities

Users can comment the activities displayed on the wall. These comments are only displayed on the wall.

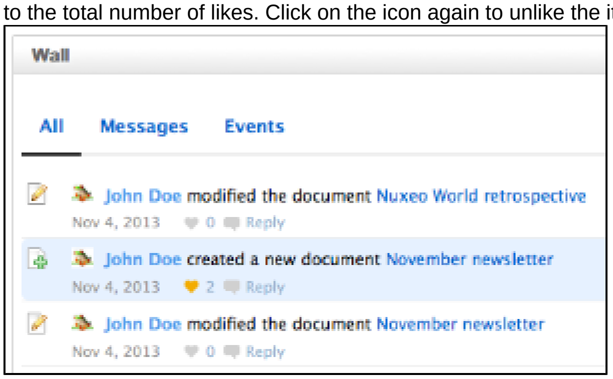
To comment an activity:

1. On the wall tab or gadget, click on the **Reply** link under the activity you want to comment.
   A text area is displayed under the activity.
2. Type your comment and click on the **Reply** button.
   The comment is now displayed under the activity and the activity is now on top of the wall timeline.
   You can delete your comment if needed.

Liking

Users can like the items on the wall feed, both activities and messages. The total number of users who like the message or activity is displayed under the item. Liking an event that occured on a document doesn't add this vote to the document itself, only to the event.

To like a message or an event, click on the icon . The icon is now colored, indicated that you liked the document, and your vote is added to the total number of likes. Click on the icon again to unlike the item.



Digital Asset Management

The Digital Asset Management module of the Nuxeo Platform provides organizations with an application to manage their digital assets which can be office (MS, OOo, PDF, ...) or multimedia (pictures, audio and video) files.

The main difference with Nuxeo DM (Document Management) is that DAM is not aimed at "producing" new documents with collaborative editing / review workflows but merely at browsing an existing collection that have been authored externally and imported in batch in the DAM application.

User will merely edit the properties / categories or add annotations to enrich the asset without editing the main attached file. The main edit actions would preferably take place in the Document Management UI.

In this user guide you will learn how to use the DAM module, so that you can:

- Import digital files (videos, images, audio)
- Search and consult the assets you need
- Edit the metadata of one or multiple assets
- Annotate documents

Nuxeo's DAM module User Guide Content

Digital Asset Management Concepts

The Digital Asset Management module of the Nuxeo Platform is dedicated to storing, indexing, archiving, and distributing digital assets. Beside the Platform minimal features, you get a new environment specifically designed to ease the management of multimedia assets. Depending on the other modules you may have installed, you can get other additional features that will take place in their own environment.

Digital Assets

The DAM module provides three document types, that are added to the document types provided by default by the Platform and by the other modules that may be enabled:

- Pictures,
- Videos,
- Audio files.

On this page

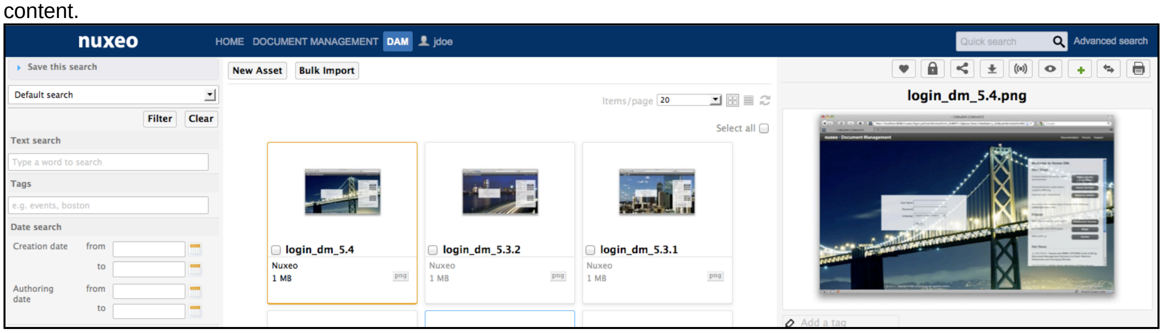
Office and PDF documents, supported by default by the Platform, can also be managed using the DAM interface.

The whole list of file formats and the available actions are listed in the Supported File Formats page.

Available Spaces

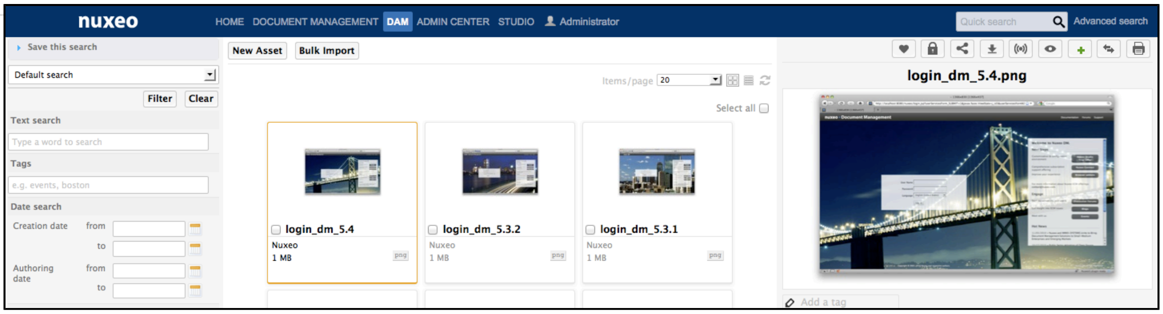
The minimal installation of the DAM module provides main tabs on top the of the page, that give access to different environments.

- The **Home** tab is where the user can find all the information that concern him: his dashboard to get a quick access to documents, and that he can customize with internal and external gadgets, the summary of his notification subscriptions, see his profile, etc.
- The **Document Management** tab from which the user can work on contents other than digital assets and manage the asset folders. This is the tab selected by default when the user logs in.
- The **DAM** tab from which he'll be able to import and browse assets. This tab enables an environment specifically designed for this kind of content.



Administrators have two extra tabs:

- The **Admin Center** tab, from which they can manage the application.
- The **Studio** tab, which provides access to Nuxeo Studio, the online customization and configuration environment.



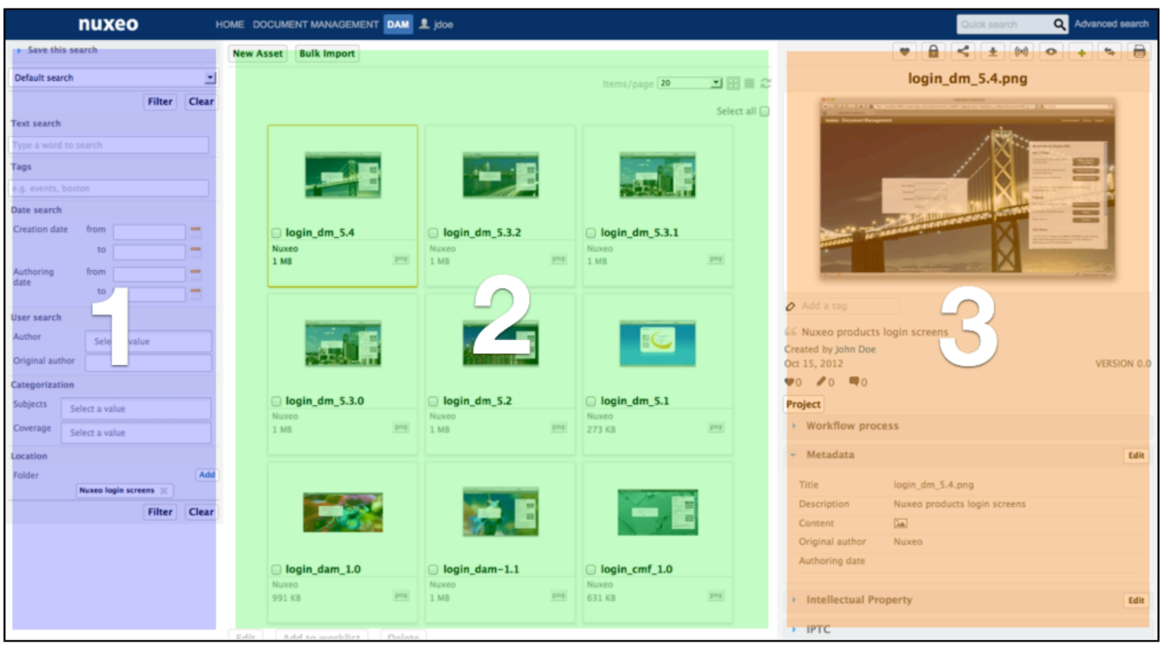
As a module of the Nuxeo Platform, DAM benefits from its standards document management features, accessible from the **Document Management** tab.
The Document Management tab gives access to two domains: the Default Domain and the Asset Library.

- The **Default domain** is the Nuxeo Platform default environment, from which users can create documents and publish them.
- The **Asset Library** is where all the assets imported in DAM are stored. You can benefit from the document management features on assets from the Asset Library.

Digital Asset Management Interface Presentation

The Digital Asset Management (DAM) user interface is designed for a search-based navigation in the assets lists. A list of filters is available, that you use to find assets.

The user interface is divided in three parts, as shown below:



1. On the left of the screen are the filtering options that enable you to search assets and narrow the results which are displayed in the center of the page.
2. The central main part of the screen is where the asset thumbnails are displayed so you can easily see the assets available.
3. The right part of the screen is dedicated to displaying the information of the selected asset: its metadata, a preview of the asset, the IP rights, the workflow status.

The DAM Permissions

The DAM access rights are:

Right	Actions in DAM
Read	Consult content Comment documents Annotate documents

Write	Import documents Edit documents + Read actions
Everything	Manage access rights + Write and Read actions
Remove	Delete documents The Remove permission is most intended to be denied, so as to restrict the actions available to users with "Write" permission.

The management of access rights to the DAM module takes place from the Asset Library's Document Management interface.

Importing Assets in DAM

Assets are imported in the Asset library, at the root of the domain.

You need to have Write permission on the Asset library to be able to import assets in DAM.

There are several ways to import documents in DAM:

- form-based creation: this enables you to create one or several assets by filling in a form and filling in a minimum set of metadata on the asset;
- drag and drop creation: you can also quickly import asset(s) by dropping them in the DAM main area without filling any metadata.

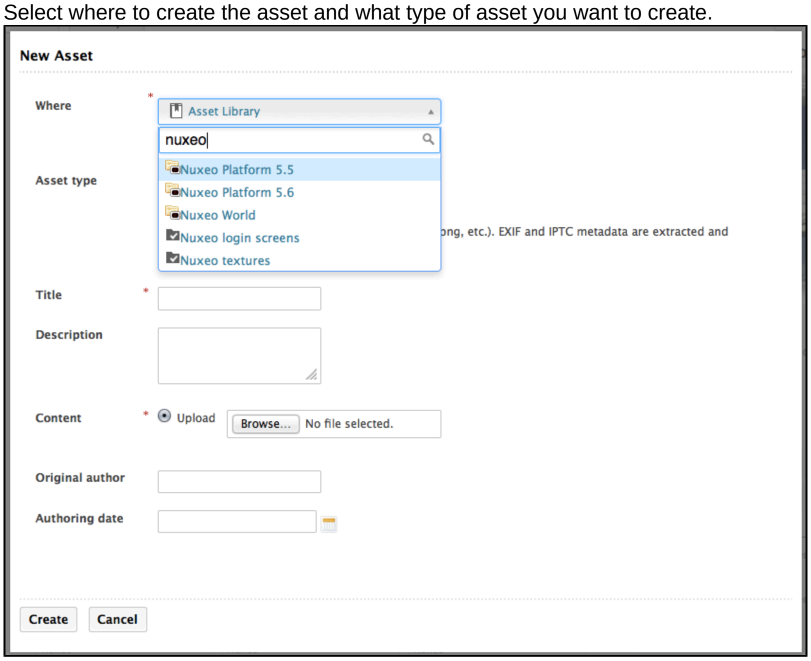
In this section

Importing a Single Asset

You can import an asset individually using a form, that enables you to fill a minimum set of metadata (see below).

To import assets individually in DAM:

1. In the middle pane of the DAM tab, click on the **New Asset** button below the main tabs.
   The "New Asset" window is displayed.
2. Select where to create the asset and what type of asset you want to create.



3. Fill in the creation form and select the file to upload.
4. Click on the **Create** button.

Once the import is done, you are displayed the content of the DAM tab.
By default, if you don't select a specific folder, assets are created at the root of the Asset library domain, but they can be reorganized in folders from the Document Management interface at any time.

Asset metadata

Field	Description
Title	Name of the asset.
Description	A textual description of the asset.
Original author	Name of the person who created the asset (photographer, graphic artist, name of a company or organization, etc.)
Authoring date	Date at which the content was created.

This is the default product metadata set, that can be adapted to your own properties.

Importing Assets by Drag and Drop

Just like you can create document by drag and drop in the Document Management interface, you can also drop assets in DAM to import them. The behavior is a little different from the DM one however, to be adapted to a DAM application. In DAM, you have two drag and drop imports:

- quick import on the DAM main view, without metadata filling in;
- smart import with metadata, accessible from the Bulk import button.

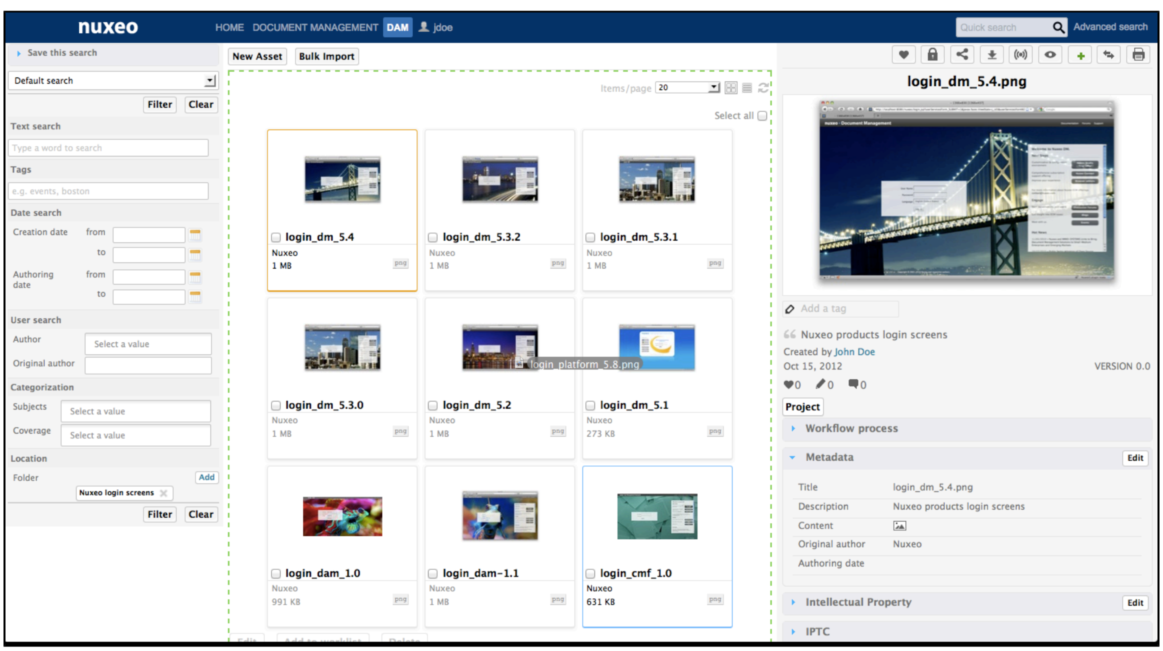
Drag and drop requirements
Drag and drop is based on the HTML 5 standard and is available on all browsers that support the HTML 5 Drag and drop, without extension. Basically, this includes Firefox 3.6+, Chrome10+, Safari 5+.

For other browsers or older versions, you may need to install an extension to enable drag and drop import.

For extensions installation, check the page Installing Drag and Drop Extensions.

Quick Import

You can easily import one or several files in DAM by dragging them for your desktop and dropping them in the main area of DAM. Assets are then automatically created at the root of the Asset library: the asset's name is the file's name with its extension. The assets have no description and no metadata filled in. The type of asset is determined by the system from the file extension: .png are picture assets, .mov video assets, .mp3 audio assets. See the Supported File Formats page for all supported formats.

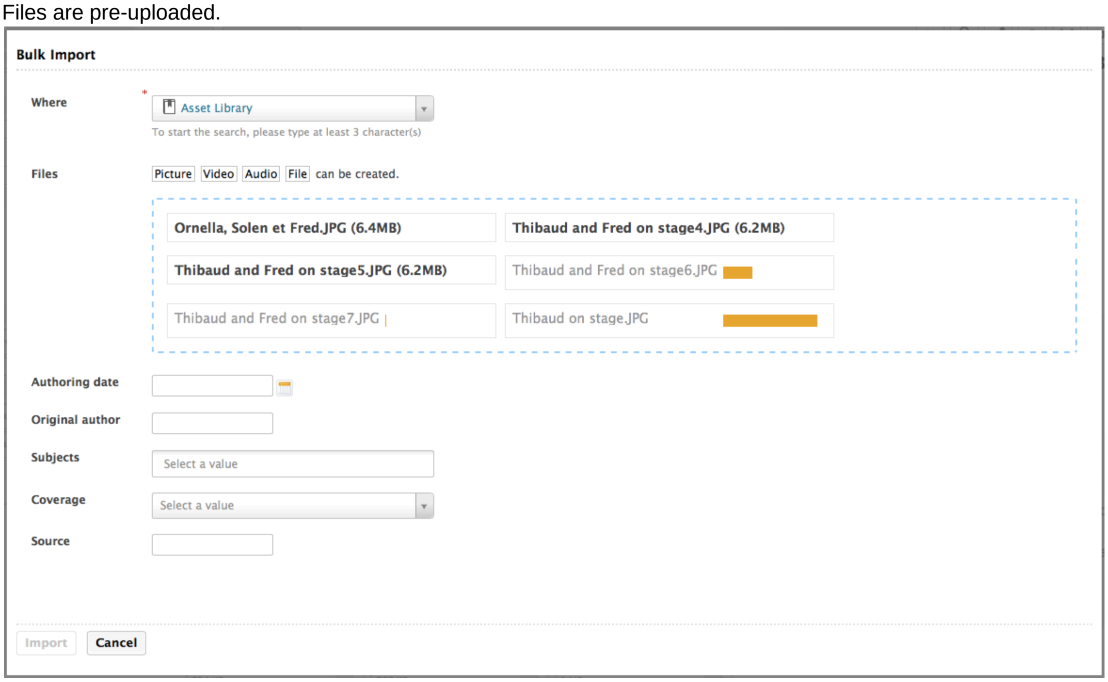


Smart Import

Prerequisite
Import with metadata is available only on browsers that support the HTML 5 drag and drop standard. Dropping assets on the drop zone using Internet Explorer on 5.7.1 will actually create the assets directly, as if you dropped them in the main area.

You can also import assets and fill their metadata in the import process. This prevents later edits of the assets and helps having more accurately indexed and so easier to find assets.

To import one or several assets with metadata:

1. Click on the **Bulk import** button on top of the assets.
   The Bulk import window pops up.
2. Search for the folder where you want to import the assets.
3. Drag your assets from your desktop to the window's drop area and drop them.
   Files are pre-uploaded.
   

4. Fill in the metadata on the form below the drop area.
   The metadata displayed correspond to the available fields filters available in the left pane.
5. Click on **Import** button.
   Assets are displayed in the DAM main tab.

Browsing and Searching Assets

Navigation in DAM is based on search and filters. By default, all the assets of the folders you can access (i.e. in which you have at least Read rights) are displayed. The principle is to narrow down the search results and so the assets displayed.

The DAM tab provides access to all the domains of the platform, that is to say Default domain and the Asset library by default. Note that it only displays assets from these domains, so only files, pictures and videos. Notes, for instance, are displayed in the DAM UI.

The search available is a full text search. Assets are indexed using their title, description, content (+ attached files), and metadata. You can also use filters. The available filter criteria are:

- Tags: user keywords on the asset;
- Creation date: the date at which the asset was imported;
- Authoring date: the date at which the assets were created (different from the date at which they are imported).
- Author: the user who imported the asset;
- Original author: the person who produced the asset. The author is not necessarily a Nuxeo user;
- Subject: the topics assigned to the assets;
- Coverage: the geographic reach of the assets;
- Folder: the space(s) you want to restrict the search to.

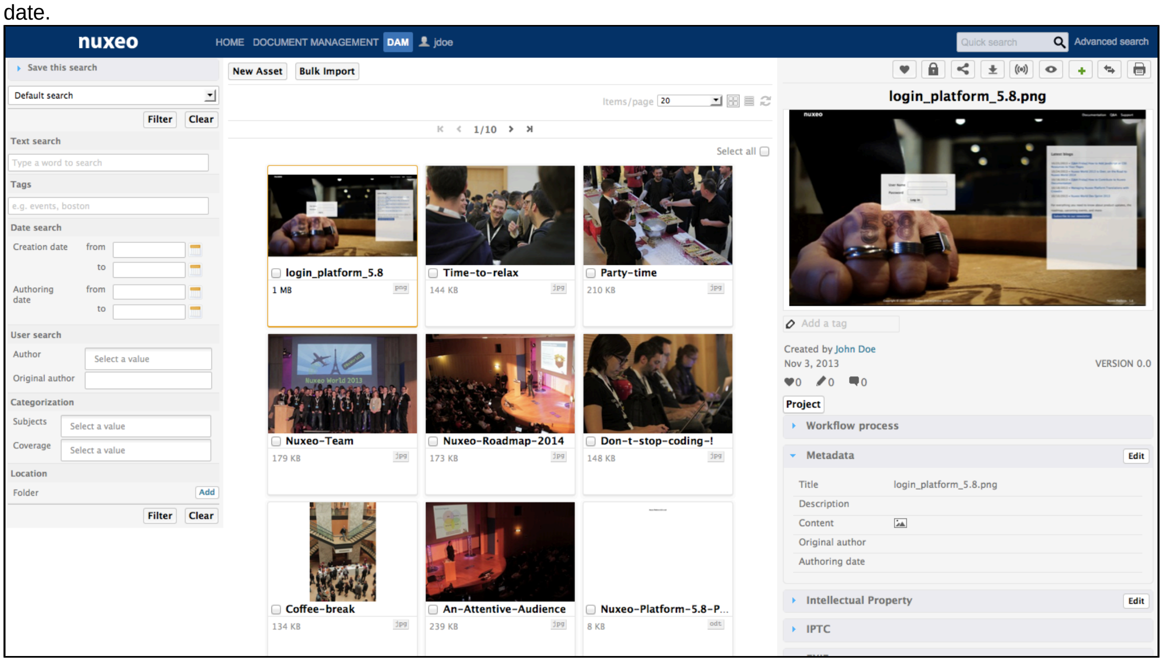
On this page

Finding Assets Using Keywords

Full text search uses stemming. The Stemming search option will return the assets containing words that have the same stem as the word you entered into the "Keywords" field.
If you enter the world "Reading", you will find the assets containing in their text metadata "Read", "reads" etc. This is not the same thing as a search with a wildcard like "*".

> For more details on Search in the Nuxeo Platform, read the Searching the Nuxeo Platform page in the Document Management chapter of this guide.

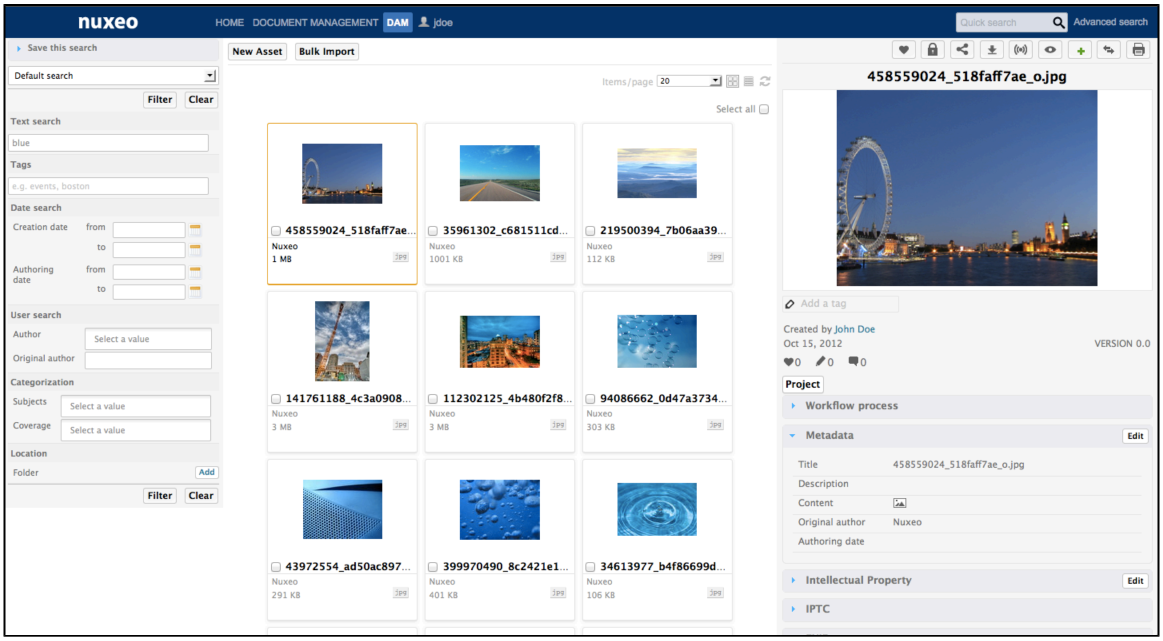
The following example shows all the assets, both in the Default domain and the Asset library. There are 10 pages of results, sorted by creation date.



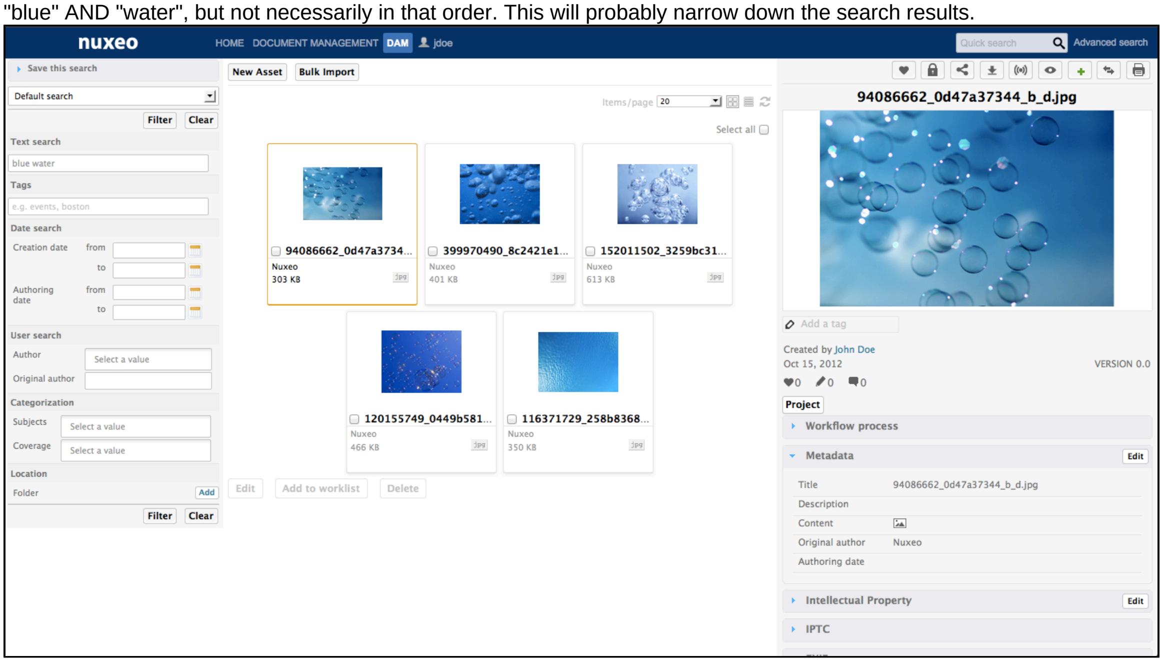
Suppose that you would like to narrow down the results to few assets, and you are looking for an illustration of a blue item.

1. On the search pane, in the "Keywords" text area, enter the search term "blue".

   The results will be the assets containing the word "blue", "BLUE", "BlUe" or any other combination of uppercase and lowercase letters: This search is not case sensitive.
   The search results will be filtered and will show only the digital files in which the word "blue" can be found:



2. Add a word in the "Keyword" full text search field, "water" for example. You will find all the assets containing in their text metadata, both "blue" AND "water", but not necessarily in that order. This will probably narrow down the search results.

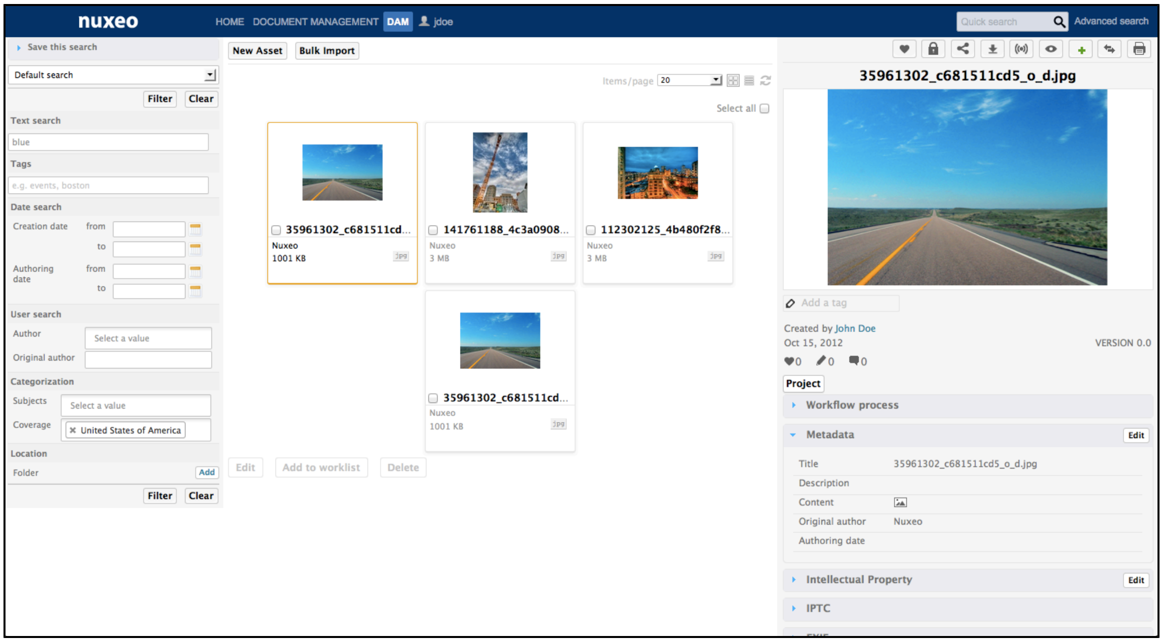


Finding Assets Using Metadata Filters

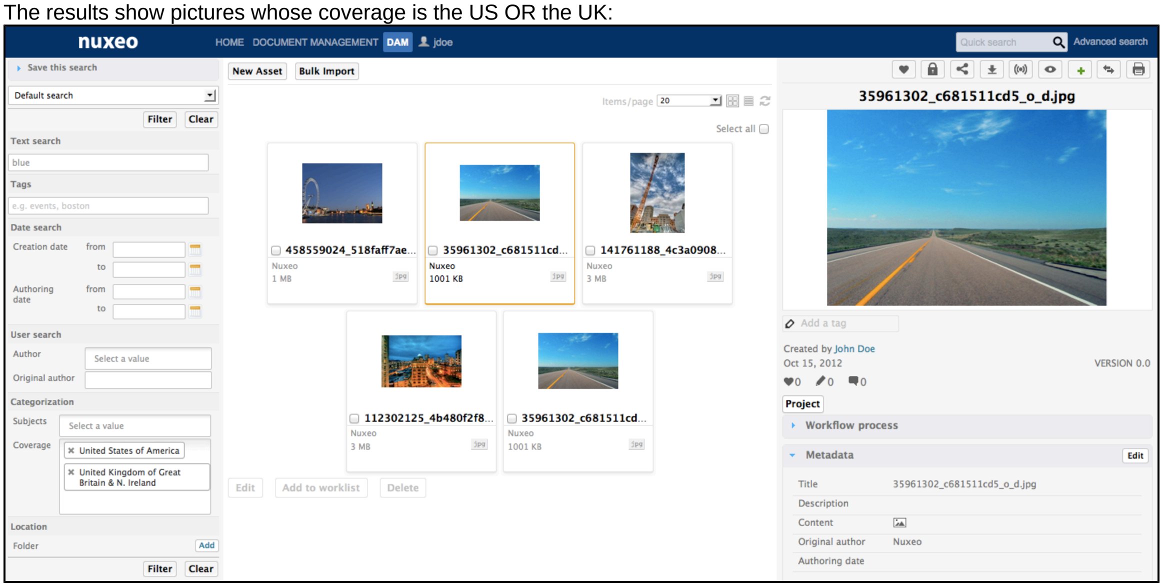
To refine your search, you can use following metadata of the assets: Coverage, Subjects, Authoring date. Select one or more of these criteria to narrow down the assets displayed.

Here is an example using Coverage filter:

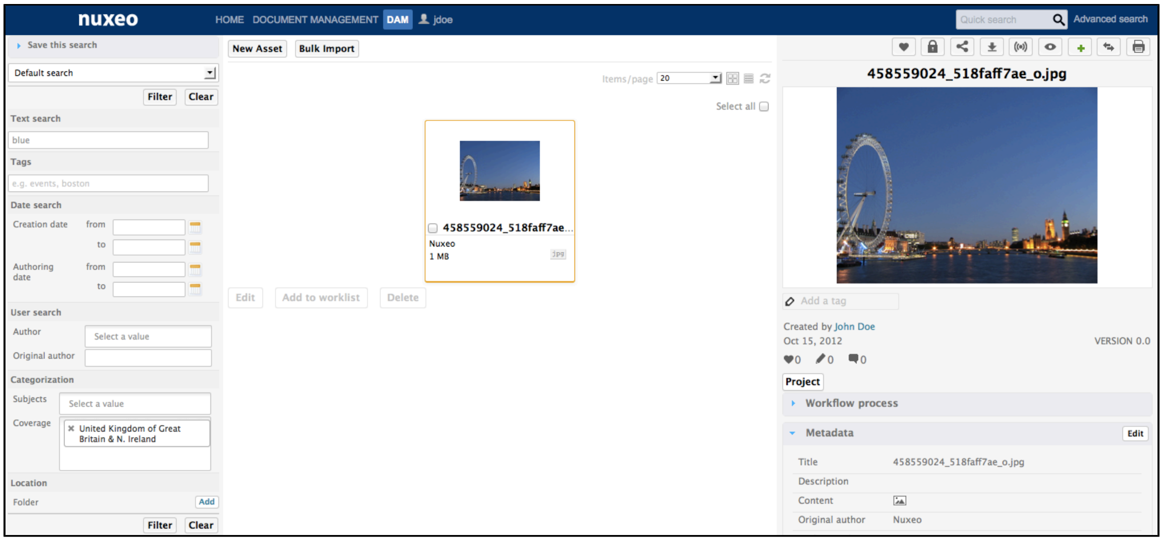
1. You want to find the pictures, with "blue", that were taken in the US.
   a. After typing "blue" in the Text search field, click on the Coverage **Add** button in the Categorization part of the form,.
   A window pops up.
   b. In the "Coverage" tree, click on "North America", and then on "United States of America".
   The value North-america/United States is added on the search form.
   c. Close the popup window.
   d. Click on the **Filter** button.
   The search results will be filtered accordingly.



2. Now, you hesitate between choosing a picture of New York, or a picture from the UK.
    a. Click on the Coverage **Add** button again.
    b. In the tree, click on "Europe" > "United Kingdom of Great Britain and N. Ireland" entry to add a new geographical coverage location.
    c. Close the popup window.
    d. Click on the **Filter** button.
    The results show pictures whose coverage is the US OR the UK:

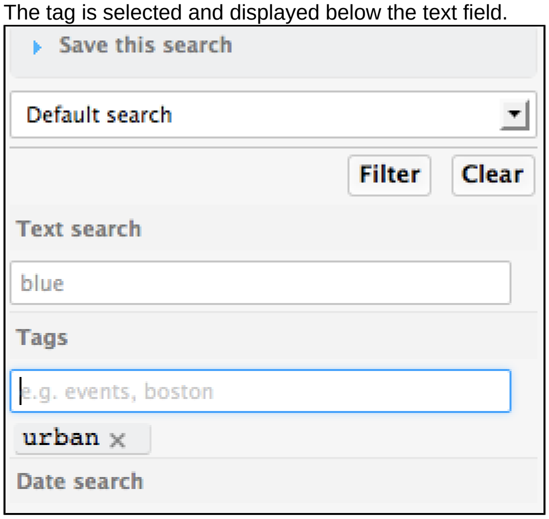


3. Now you want only the UK pictures:
    a. Click on the icon of the entry "United States of America".
    b. Click on the **Filter** button.
    This criterion is removed from the search. You only see the assets that concerns the UK:

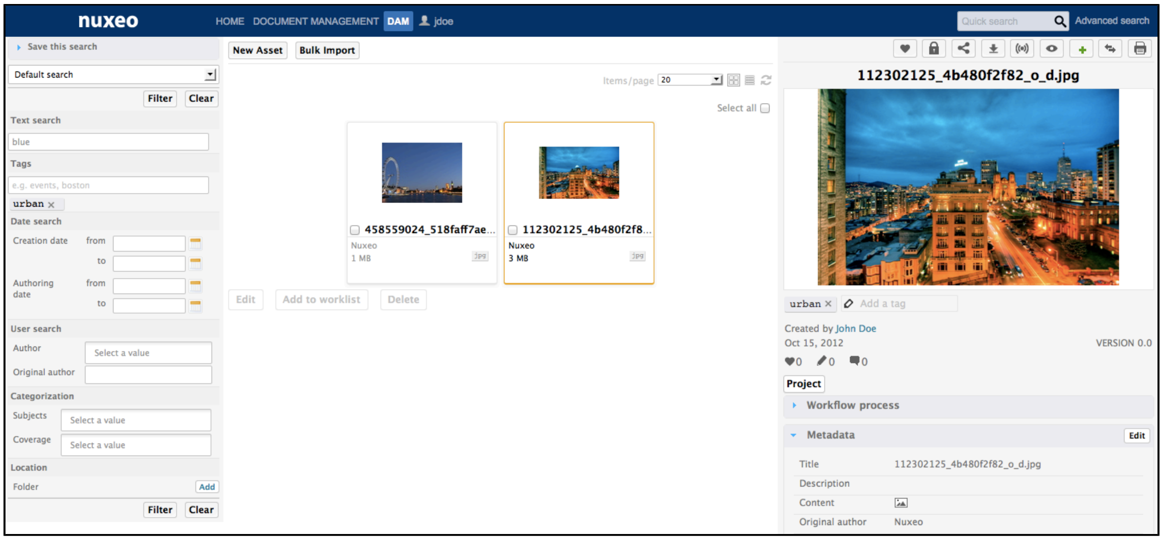


Finding Assets Using Tags

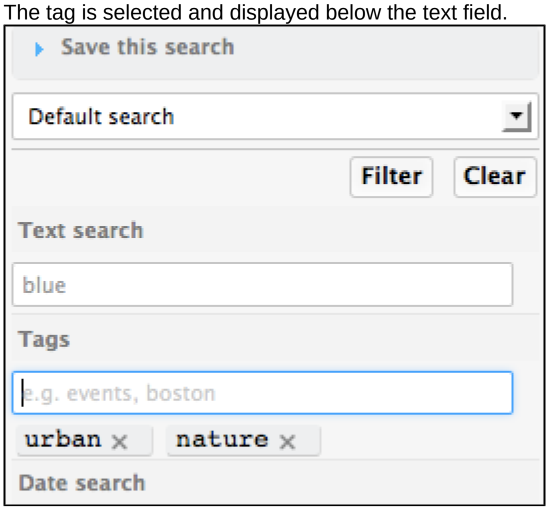
You can also refine your search using tags. For instance, you want to find urban pictures, with "blue".

1. From the "blue" full text search results, start typing "urban" in the Tags field.
   Tags corresponding to what you are typing are suggested below the text field.
2. Click on the "urban" tag in the list.
   The tag is selected and displayed below the text field.
   

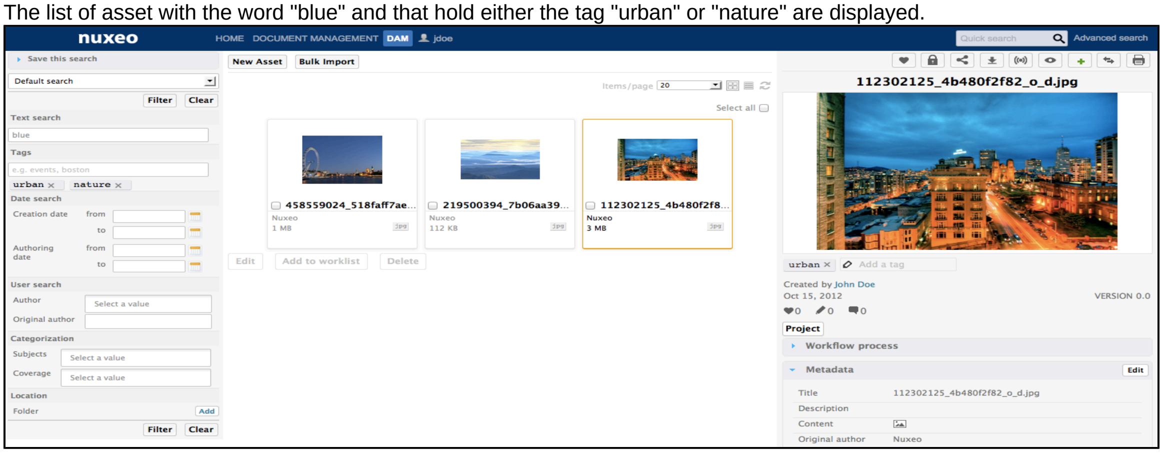
3. Click on the **Filter** button.
   The list of assets with the word "blue" and with the tag "urban" is displayed.



4. Now, let's say that you also want pictures that show the nature. Start typing "nature" in the Tags field.
   Tags corresponding to what you are typing are suggested below the text field.
5. Click on the "nature" tag in the list.
   The tag is selected and displayed below the text field.



6. Click on the **Filter** button.
   The list of asset with the word "blue" and that hold either the tag "urban" or "nature" are displayed.



Saving a Search

If you regularly do the same search, you should save this search for future reuse.

When you save a search, you save the criteria of the search. This means that the results displayed when you reuse the search may be different from the results at the time you saved the search, as the content of the application may (and probably will) have changed.

You can save as many searches you need. Saved searches are available in the "Saved searches" drop down list. To load a search, just click on it in the list. It is automatically executed.

To save a search:

1. Once you are satisfied with your search, click on the **Save this search** title on top of the filters.
   Give the Search a title.
2. Click on **Save**.
   Your search is saved. It is now available in the drop down list so you can run it in one click.
   It is also available in the **Saved searches** tab of your **Home**, in the **DAM searches** tab. You can edit it from there. Editing a DAM search works like editing a saved faceted search.

Sharing a Saved Search

Saved searches are stored in the **Saved searches** tab of your **Home**. This enables you see them as documents and to edit and share them.

Depending on the modules you use and possible customizations, there can be several tabs in the Saved searches. For instance, if you use the Document Management and Digital Asset Management modules, you will have two tabs: Faceted searches, for DM saved faceted searches, and DAM searches, for DAM saved searches.

To share a search:

1. Go on the relevant **Saved searches** tab in your **Home**.
2. Click on the search you want to share.
3. Click on the search **Manage** tab and give Read access right to the users you want to be able to use the search.

Consulting and Editing Assets

This page describes the information available on the different assets types, and how to consult and edit them.

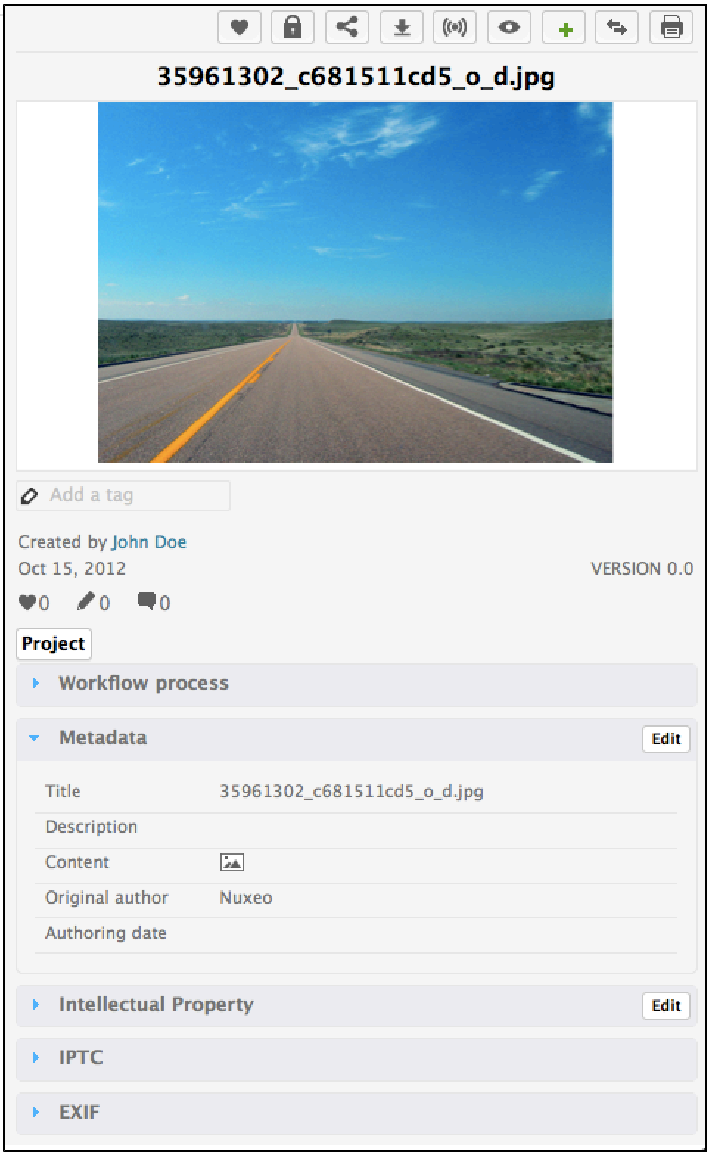
Consulting Assets

Users can see assets when they have at least "Read" permission on the folder in which the asset is located. By default, assets are created at the root of the Asset library domain, but they can be reorganized in folders from the Document Management interface.

To consult assets, whatever their type, you just need to on them in the asset list. The asset is then displayed on the right column of the page and you have access to a set of information and actions:

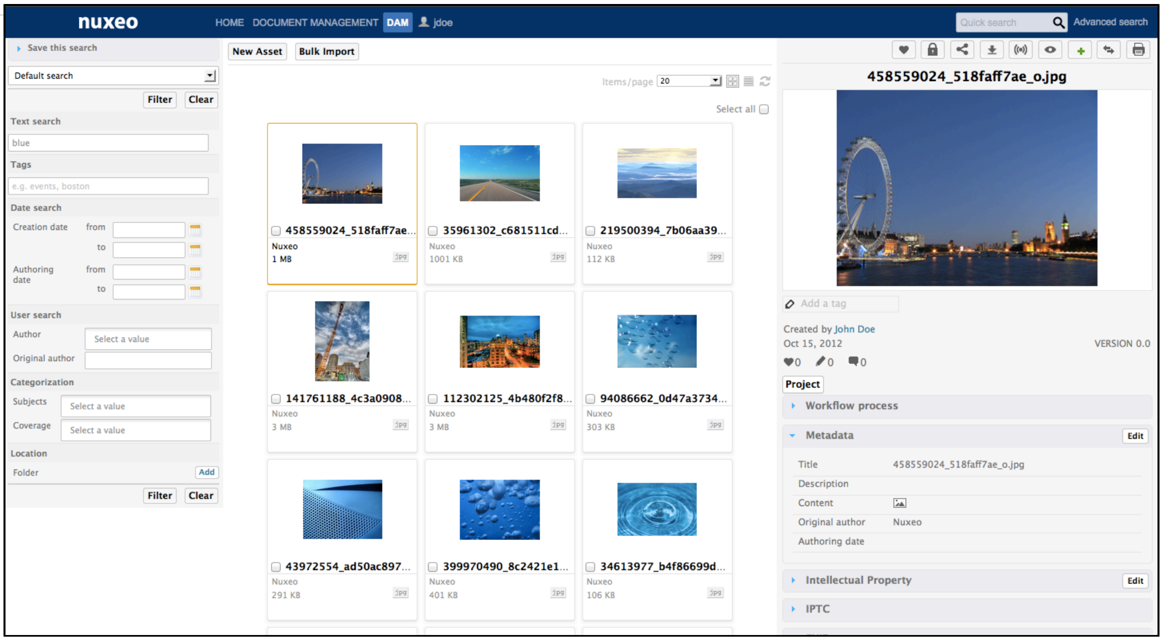
- Metadata: the set of metadata that correspond to the asset type (see below):
    - Generic meMetadatatadata: same set of metadata as in Document Management;
    - EXIF and IPTC metadata: picture specific metadata, extracted automatically;
    - Storyboard: thumbnails that segment videos;
    - IP rights information: information about permissions for use of the asset;
- Like,
- Asset preview: full-size view of the asset from which you can annotate the asset;
- Locking,
- Download,
- Permanent link to the asset,
- Follow the asset: get email notifications to follow what happens on the asset;
- Add the asset to the worklist to easily copy, move or export it;
- Document management view of the asset, to have access to complete document management features (history, relations, publishing),
- Print view of the asset.

On this page



Consulting a Picture

When you browse and search a picture, you just need to click on it in the list of asset to preview it on the right column of the page and consult its metadata. To see its full-size version, click on the icon . You can annotate the picture from this view.



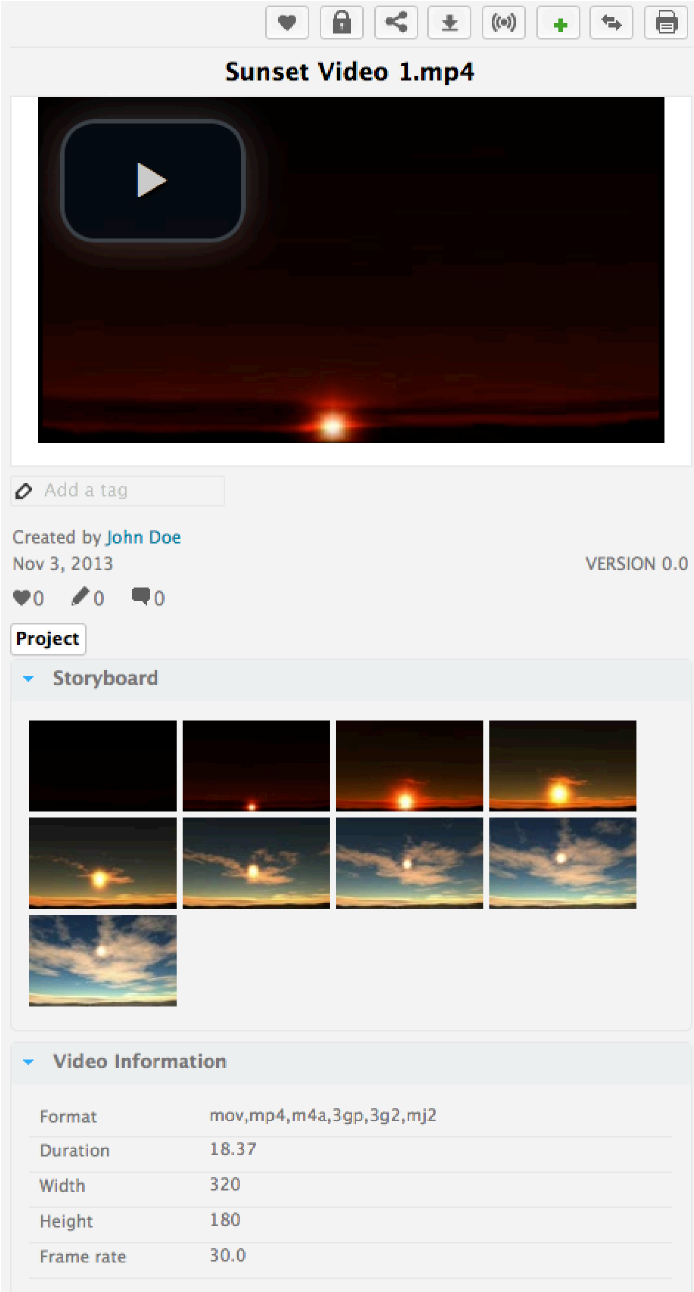
Consulting Office Documents

From the list of assets, click on an office document to see its metadata in the right column. No small preview is available in this column for office documents, but you can click on the icon to have a full-size preview, on which you can add annotations.

Consulting a Video Asset

When a video is imported, thumbnails that segment the video are automatically created to constitute a storyboard.

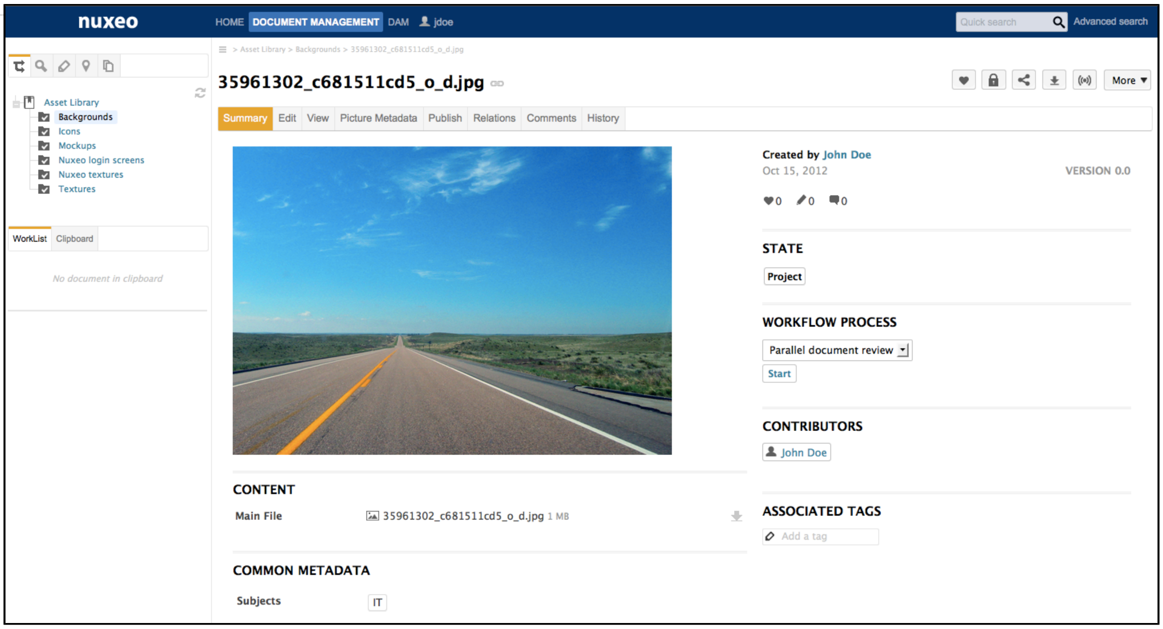
You can view the chapter you were looking for by clicking on the corresponding thumbnail.The video will play in the preview, starting at the image you selected.



Consulting the DM View of Assets

The Asset library domain in which assets are created is available from the Document Management tab. Assets are thus also available from this tab, with all the Document Management features.

You can easily go to the DM view of the asset by clicking on the icon .

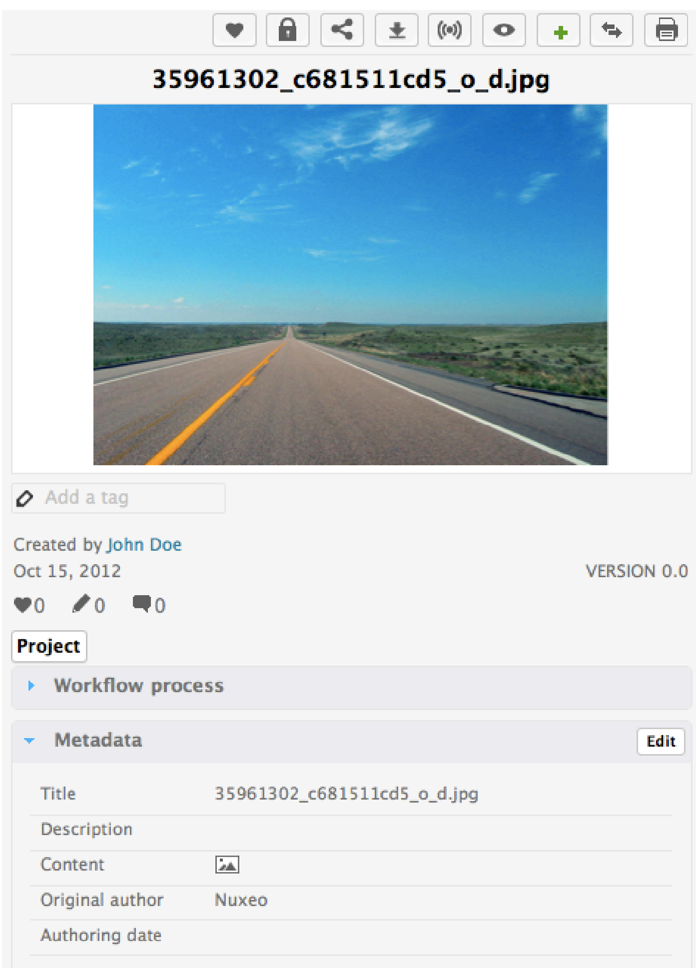


Consulting the Asset's Metadata

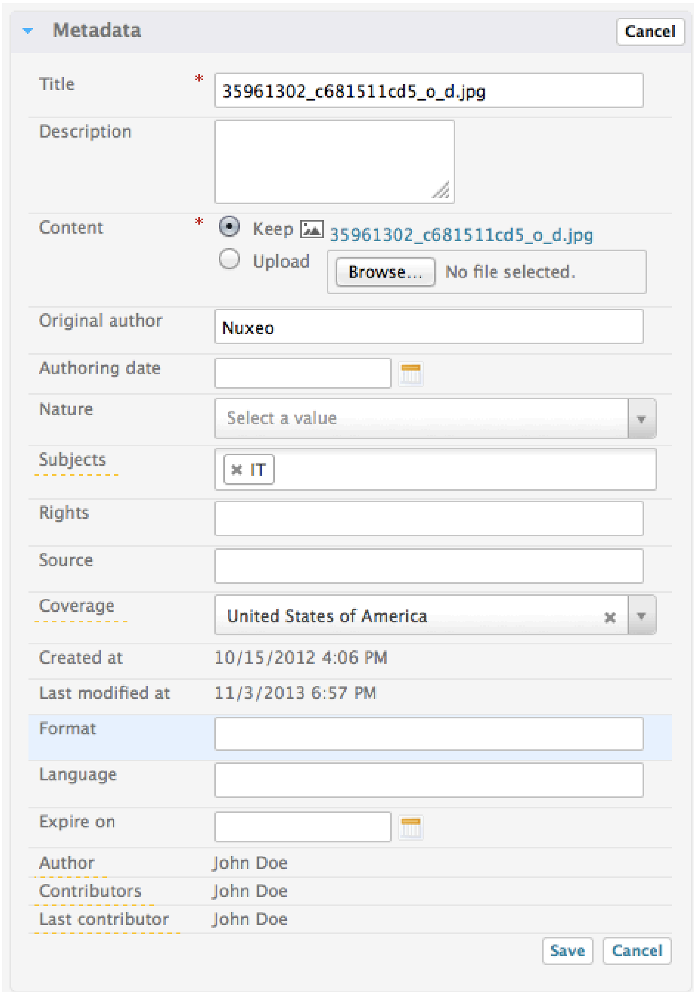
Metadata

Some of the asset's metadata are automatically filled in by the system.

Picture metadata view mode:



Picture metadata edit mode:



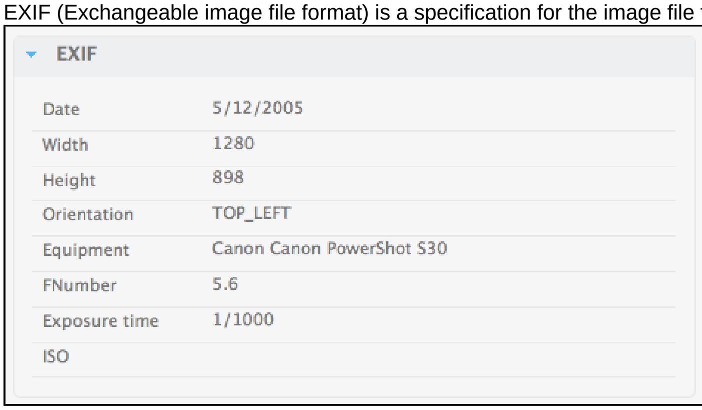
Title	Description
Title	Name of the asset, displayed under the preview
Description	Description of the asset
Original Author	Person who created the asset, manually indicated when the asset was imported.
Nature	Type of the asset, selected in a list
Subject	Topic(s) of the asset
Rights	Information about the reproduction rights of the document. Detailed rights are available in the IP Rights tab of the asset.
Coverage	Geographic or temporal coverage of the resource, the geographic applicability of the resource, or the jurisdiction under which the resource is relevant
Created at	Date automatically filled in by the system when the asset is imported.
Last modified at	Date automatically filled in by the system when the asset is modified.
Format	Format of the asset, if any is preferred
Language	Language of the asset
Expiration date	End of the asset's validity

Author	User who imported the document. This field is automatically filled in by the system. The author can be different from the original author.
Contributors	Users who modified the asset. This field is automatically filled in by the system.
Last contributor	Last user who modified the asset. This field is automatically filled in and updated by the system.
Size	Size of the asset
Height	Height of the full size asset
Width	Width of the full size asset
Duration	Duration of the video and audio assets. This is only displayed on video and audio assets.

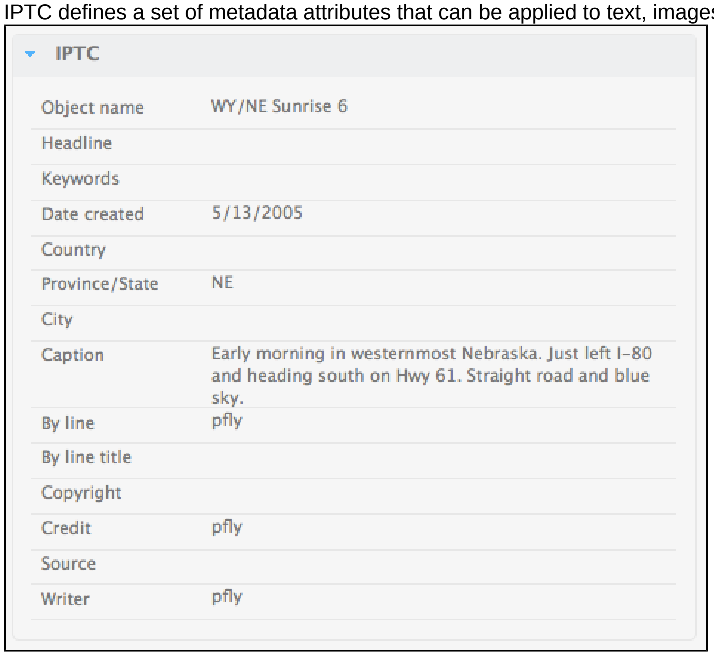
IPTC and EXIF Metadata

When assets are imported, the system extracts the metadata embedded in the resource if it exists:

- EXIF (Exchangeable image file format) is a specification for the image file format used by digital cameras.



- IPTC defines a set of metadata attributes that can be applied to text, images and other media types.



These metadata cannot be edited.

IP (Intellectual Property) Rights

Assets also have an **IP Rights** box, in which you can specify permissions for use of the file.

You can specify geographical restrictions for broadcast, copyright, Creative Commons Licence, embargo and expiration date.

The embargo and expiration date are only informative fields, there is no automatic process on those dates.

History

The history of the asset is available on its DM view.

Editing Assets

Editing a single Asset's Metadata

You need to have at least "Write" permission to be able to edit the properties of an asset and enrich it.
When you edit an asset, you can modify its main metadata and its IP rights.

The size, height, width and duration information are not editable.

To edit an asset:

1. Click on an asset to preview it and see its metadata.
2. Click on the **Edit** button of the Metadata box.
3. Edit the information you wish.
4. Click on the **Save** button.
   The new values are saved. The asset's history is updated and the fact that you edited the asset is tracked.
5. Click on the IP Rights **Edit** button if you want to edit them.
6. Update the Intellectual properties information.
7. Click on the **Save** button.
   The new values are saved. The asset's history is updated and the fact that you edited the asset is tracked.

The metadata can also be edited from the Document Management view.

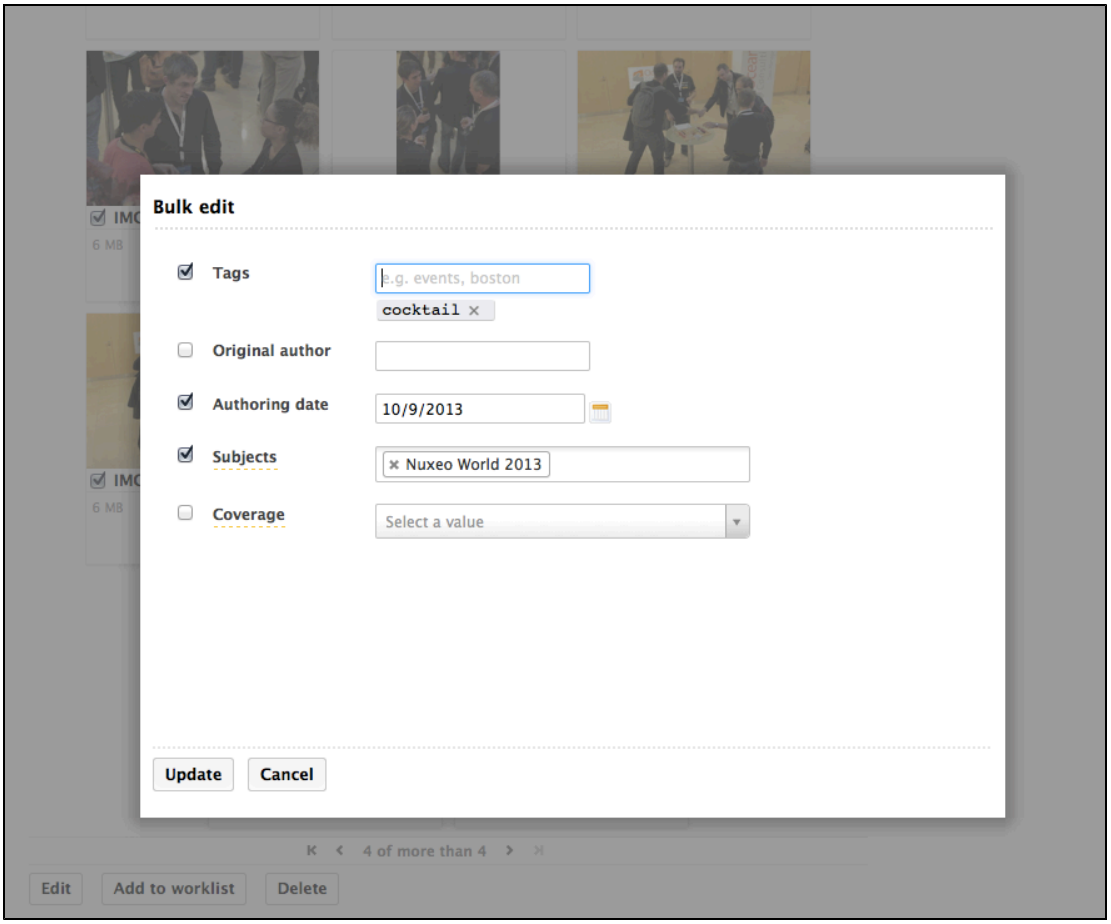
Editing several assets

It is possible to edit the metadata of several assets at the same time. Like for editing a single asset, you need at least "Write" permission.

Note that the values you set from the bulk edit form will overwrite any value previously set on the documents, except for the tags, that will be added to the tags already set on the documents.

To edit several assets metadata:

1. Select the assets you want to edit using the checkboxes.
2. Click on the **Edit** button at the bottom of the list.
3. On the bulk edit form, indicate the metadata the documents should now hold.



4. Click on the **Update** button.
   The new values are saved and replace possible previous values. The assets' history is updated and the fact that you edited the asset is tracked. A minor version of the assets is automatically created.

Annotating Assets

You can annotate pictures and text in DAM.

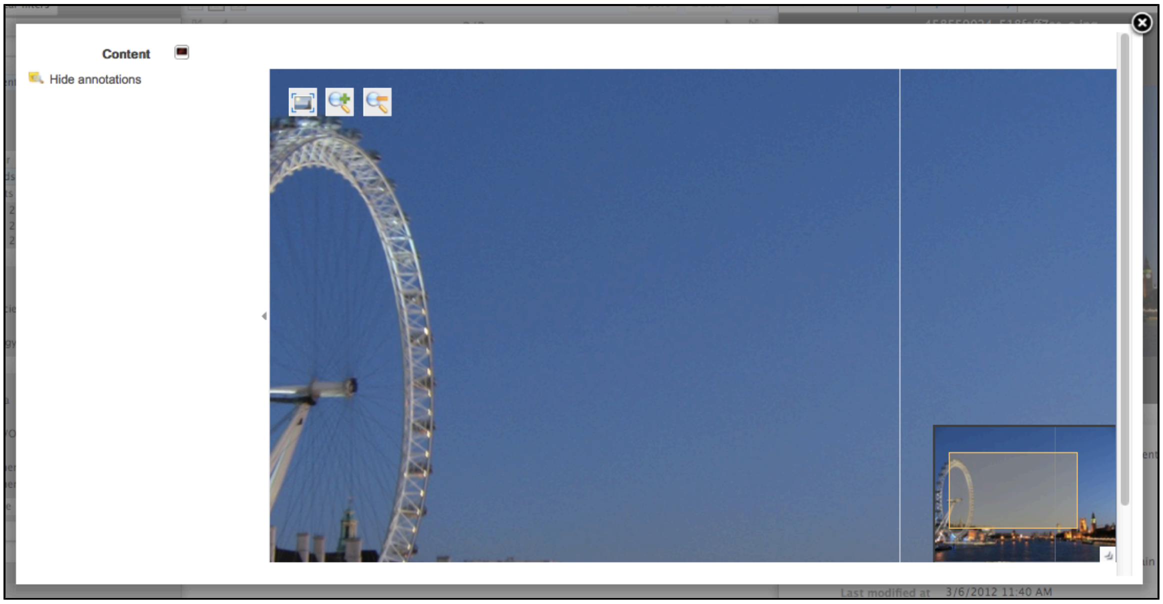
You can add annotations on all the assets that you can see (i.e. you have "Read" permission).

On this page

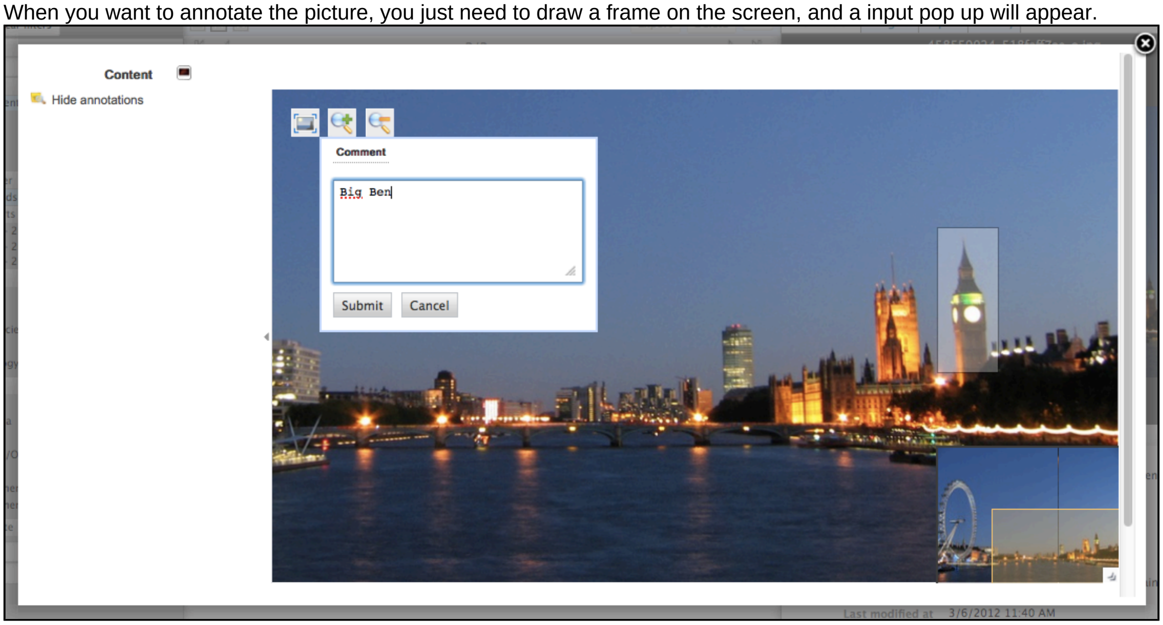
Annotating a Picture

To add an annotation on a picture:

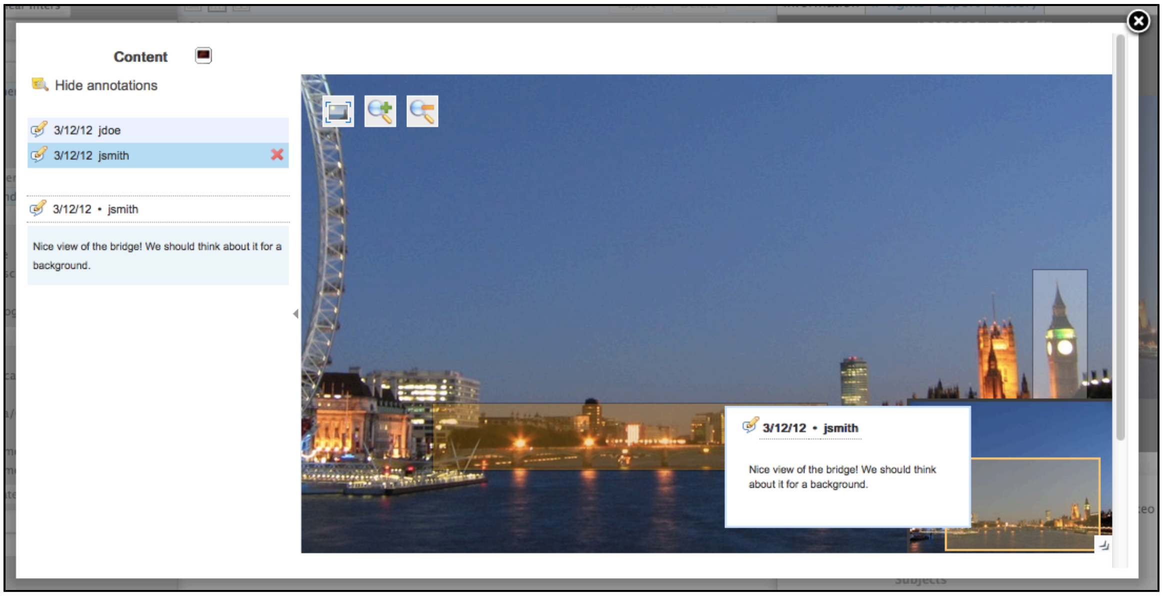
1. To access to the image view, click on the icon .
   A pop up opens.
2. You can zoom in, zoom out, and move within the picture thanks to the tiling feature, that enables visualization of very big pictures on your screen. To use this feature, move the yellow frame in the thumbnail on the bottom right of the pop up.



3. When you want to annotate the picture, you just need to draw a frame on the screen, and a input pop up will appear.



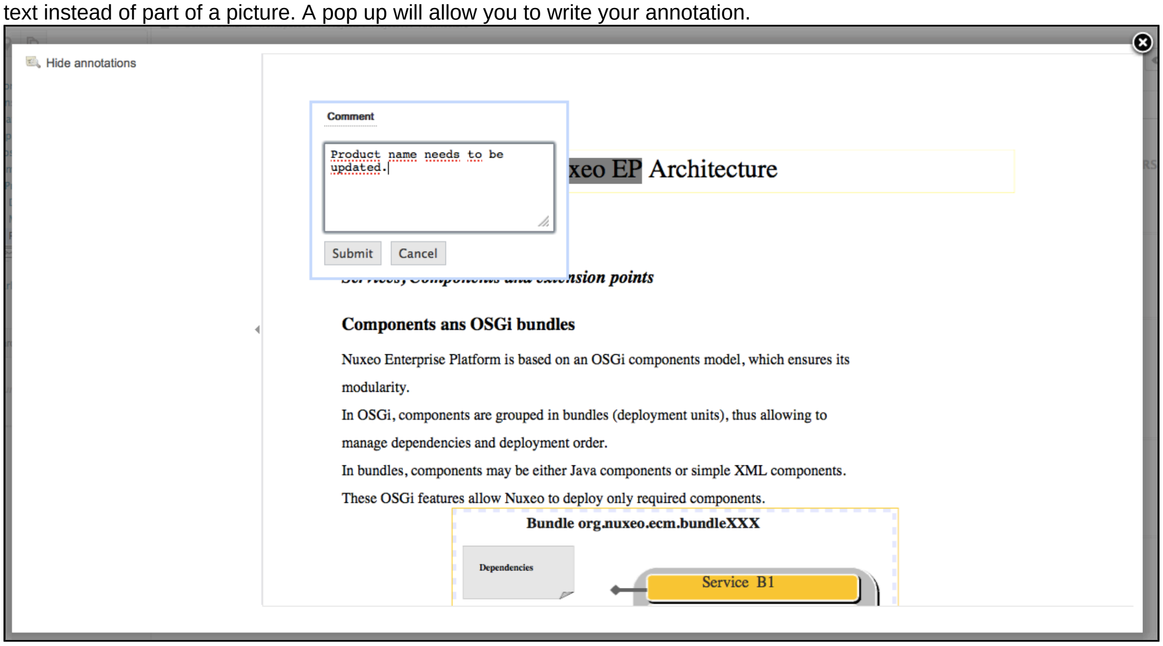
4. Once you click on **Submit**, the annotation is saved.
   Then, you can see your annotation when the mouse is over the zone you selected, and, in the margin, the list of annotations, and for each, the author, date and time of annotation and the text.



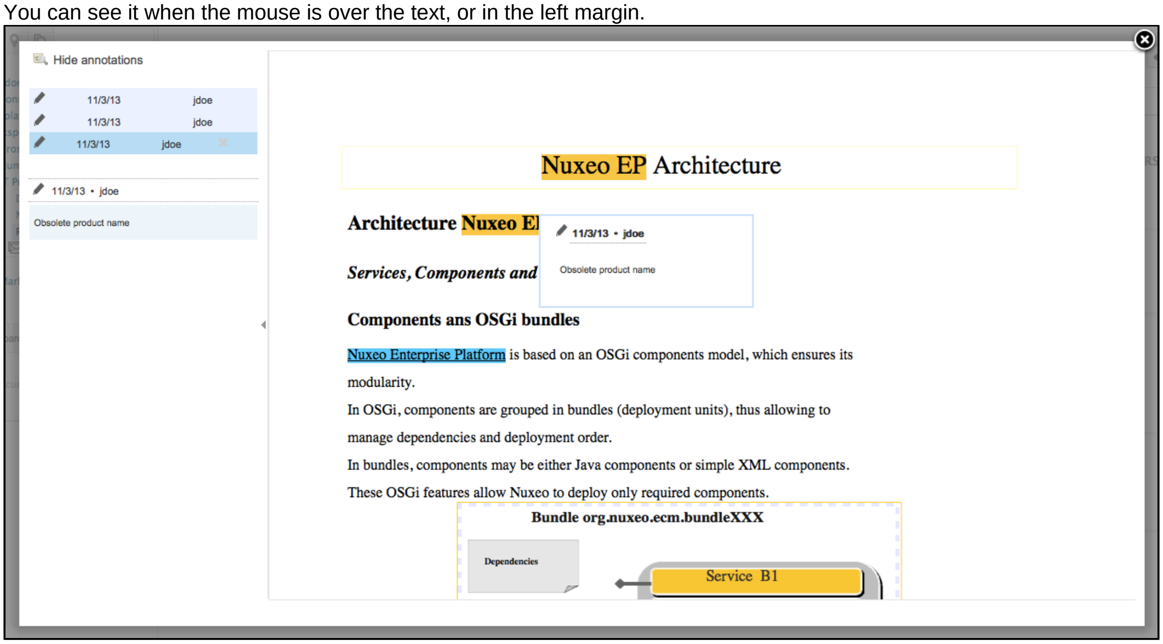
Annotating a Document

You can preview an office document, and review all the pages. You can also annotate it.

The process is exactly the same as for picture annotation and works the same way in the DAM or DM interface: On the document preview, select text instead of part of a picture. A pop up will allow you to write your annotation.



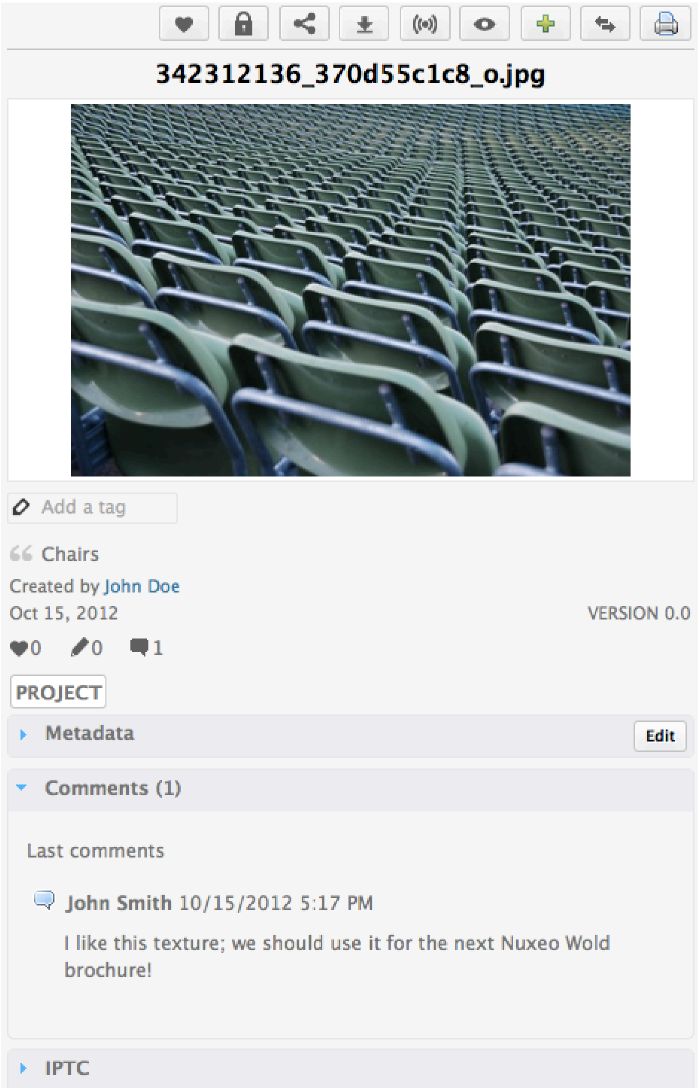
Once you click on **Submit**, the annotation is saved.
You can see it when the mouse is over the text, or in the left margin.



Commenting Assets

Comments enable users to discuss the asset and its evolution.

Commenting documents takes place from the Document Management view of the asset. The number of comments on the asset is displayed on its DAM view. When there is at least one comment on the document, a new Comments box is available on asset's DAM view:



Exporting Assets

When you export assets, you actually download it. Depending on the type of asset, you get different exports.

How to Export Assets

Assets have an icon that enables you to export directly from their view on DAM:  . Click on that icon and save the "attachments.zip" file. You can then unzip the folder and see the exported files (see below for exported files depending on the asset type).

You can also have access all the export options from the DM view of the asset.

In this section

Asset Exports

Exporting Pictures

When you export pictures, you get a folder with four files:

- Original image: original size and format of the imported picture;
- Original Jpeg image: the picture is converted to JPG but the original size is kept. This export is done even if the original picture was a JPG file;
- Medium size image: the picture is converted to JPG and resized to 550 px height or width;
- Thumbnail: the picture is converted to JPG and resized to 100px height or width.

> The original and medium pictures can be the same size when you download them if the original is smaller or equal to medium size.

Exporting Videos

When your export a video asset, you get a folder with several files available:

- The original video file,
- One WEBM conversion,
- One MP4 conversion,
- One JPEG picture by storyboard chapter,
- One JPG picture prefixed with "StaticPlayerView_video-screenshot-", which is the picture extracted from the video that is used for the player picture,
- One JPG picture prefixed with "Thumbnail_video-screenshot-", which is the thumbnail used in folders proposing a thumbnail view (typically in the DAM view).

Exporting Office Files

When you export an office file (PDF, DOC, ODT, etc), you download the original file only.

Managing Access Rights in DAM

Access to documents and the actions allowed are determined by access rights on the Asset library domain and the DAM folders. Some users will then be allowed to only read documents, when others will be able to edit documents or to manage folders and documents. The management of the access rights is done from the **Document Management** tab of the application, in the **Asset Library** domain that contains the DAM folders.

The DAM permissions are:

Right	Actions in DAM
Read	Consult content Comment documents Annotate documents
Write	Import documents Edit documents + Read actions
Everything	Manage access rights + Write and Read actions
Remove	Delete documents The Remove permission is most intended to be denied, so as to restrict the actions available to users with "Write" permission.

To manage access rights on a DAM folder, you can :

1. In the **DAM** tab, from an asset click on the icon to go the DM view of the asset.
2. Click on the icon to go the parent folder of the asset that you want to set access rights on.
3. Add or Remove access rights following the same steps as on a workspace.

You can also directly browse the the **Asset library** domain in the **Document Management** tab to the space you want to grant or deny access.

Supported File Formats

The Platform Digital Asset Management module supports a large number of file formats.

Format	Import in DAM	Mimetype recognition	Thumbnail & preview	Metadata Extraction	Transcode, delivery, watermarking
Pictures					
JPG	X	X	X	X	X
PNG	X	X	X	X	X
GIF	X	X	X	X	X
RAW	X	X	X	X	X
JPG2000	X	X	X	X	
TIF	X	X	X	X	X
BMP	X	X	X		X
PSD	X	X	X		X
AI	X				
EPS/PS	X	X			
PCX	X				
PICT	X				
SVG	X				
WMF	X				
EMF	X				
QXD	X				
INDD	X				
Video					
ogg	X	X	X	X	X (transcode)
avi (divx, ...)	X	X	X	X	X (transcode)
mp4	X	X	X	X	X (transcode)
flv/fla	X	X	X	X	X (transcode)
QT/mov	X	X	X	X	X (transcode)
mpeg/mpg/mpe	X	X	X	X	X (transcode)
WMV	X				
swf	X				
Audio					
ogg	X	X	X (only preview)		
mp3	X	X	X (only preview)		
wav	X	X	X (only preview)		
m4a/aac	X	X	X (only preview)		
ac3	X				
aif/aiff/ aifc	X				
au/snd	X				

asf	X				
Office					
pdf	X	X	X (only preview)		X
Microsoft Office (c)	X	X	X (only preview)		X
Open Office	X	X	X* (only preview)		X
RTF	X	X	X (only preview)		X
Microsoft Access (c)	X				
Microsoft publisher (c)	X				

*Client browser must have the associated plugin installed

Managing Your Nuxeo Application

Administrators can configure some elements directly from the Nuxeo Platform's user interface.

As an administrator, you are in charge of managing users and groups. You can create news users and groups, edit their properties, or even delete users or groups. You can also manage vocabularies, i.e. the labels displayed in drop down lists. The default Home dashboard is also predefined by administrators. Users can then customize it.

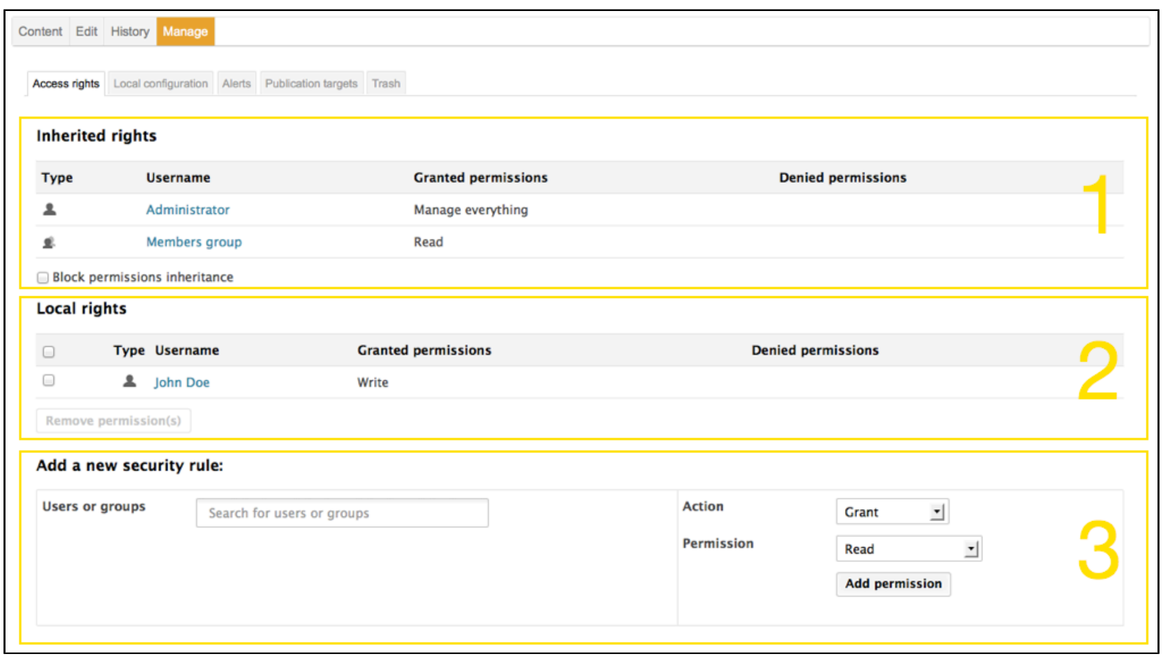
At a space level, space managers are in charge of managing access rights.

Managing Access Rights

Only users with management rights can manage the access rights of a space.

Managing access rights means granting or denying access rights in a space. The access rights management screen is available as a sub-tab in the **Manage** tab of the space.

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



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

On this page

Rights Prioritization

The access rights available are:

Right	Actions in workspaces	Actions in sections
Read	Consult content Comment documents Annotate documents Tag documents	Consult content Comment documents Annotate documents Tag documents + Can ask for publishing actions
Version	Manage the archived versions of a document (view, restore, delete) + Read actions	
Write	Create documents Edit documents Add / remove relations Start a workflow + Remove actions + Version actions + Read actions	Create sections Approve document publishing Unpublish documents + Read actions + Remove actions
Manage	Manage access rights Set alerts to other users Apply a preset look on documents Manage deleted documents + Write actions + Read actions	Manage access rights Set alerts to other users Apply a preset look on documents Manage deleted documents + Write actions + Read actions
Remove	Delete documents (this permission is included in **Write** right) The Remove permission is most intended to be denied, so as to restrict the actions available to users with "Write" permission.	Delete sub-sections (this permission is included in **Write** right) The "Remove" permission is intended to be denied, so as to restrict the actions available to users with "Write" permission.
Can ask for publishing		Submit documents for publishing (this permission in included in **Read** right) The "Can ask for publishing" permission is intended to be denied, so as to restrict the actions available to users with "Read" permission, typically to enable users to see the content of a section without being able to publish in the section.

As you can see, some rights include more permissions than others, and sometimes include other rights. That's the case for "Write", that includes "Remove".

Beside the fact that some rights are stronger than others, you should be aware, when you set up rights on a space, that some rights have priority over others:

- local rights have priority over inherited rights,
- granted rights have priority over denied rights.

The fact that the rights are given or denied to a single user or a group doesn't have any influence.

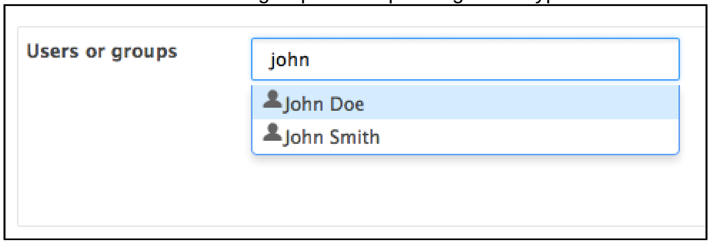
Granting Access Rights

To grant access rights:

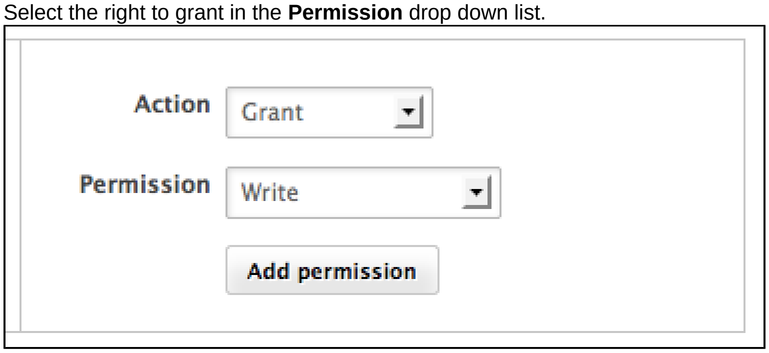
1. Click on the **Manage** tab of the space.

The **Access Rights** sub-tab is displayed.

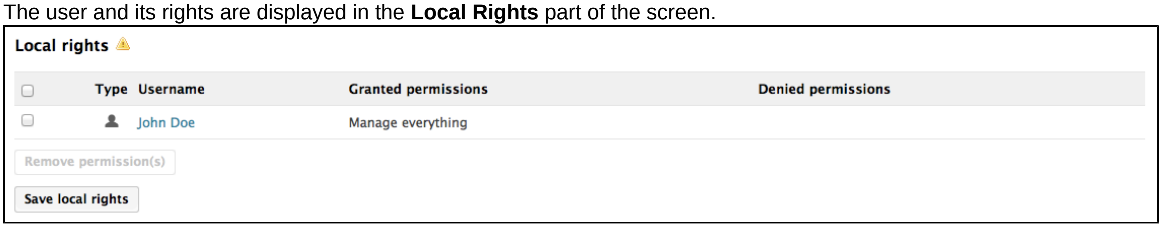
2. In the form, type the username of the user you want to grant rights to.
   To give access rights to a group, type the group's name.
   The names of the users or groups corresponding to the typed characters are automatically displayed as you type.



3. Click on the user you want to give access rights to.
4. Select the right to grant in the **Permission** drop down list.



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



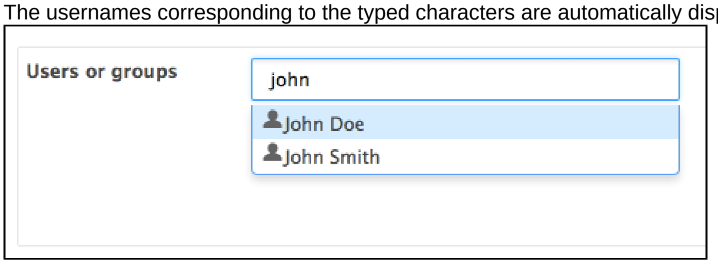
6. Save local rights modification by clicking on the **Save local rights** button.
   Local rights are saved and applied.

Denying Access Rights

If a user has inherited rights that you don't want him to have in the current space, you can deny him these rights. If you want to deny access rights to a large number of users, block rights inheritance and give access rights only to the users you want to be able to access the workspace or section.

To deny access rights:

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.

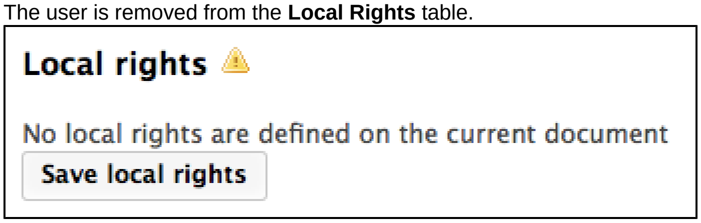
6. Save local rights modification by clicking on the **Save local rights** button.
   Local rights are saved and applied.

Removing a User from Local Rights

If you want to refuse rights to a user, and that these rights have been granted in the current space, you can remove the user from the local rights.

To remove a user from the local rights:

1. Click on the **Manage** tab of the space.
   The **Access Rights** sub-tab is displayed.
2. In the **Local Rights** part of the screen, check the box corresponding to the user you want to remove.
3. Click on the **Remove permission(s)** button.
   The user is removed from the **Local Rights** table.



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

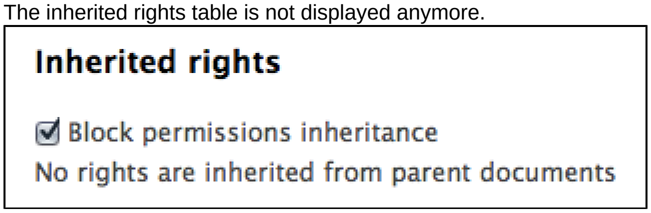
Blocking Rights Inheritance

The rights that are granted or denied in a space are applied to the space's content, including its sub-spaces. You thus have the same rights in the sub-spaces as in the parent space. That is called rights inheritance.

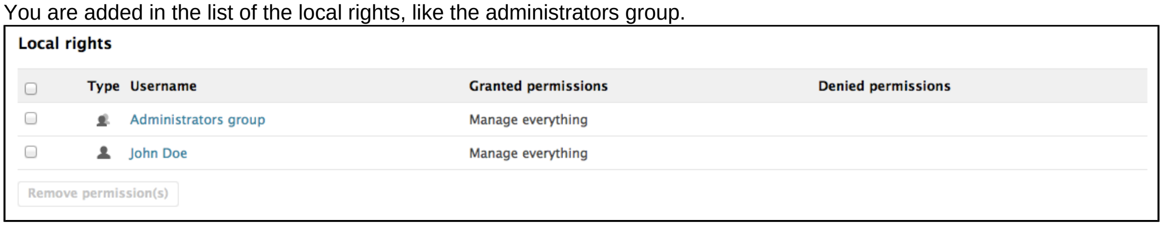
You can block this inheritance. It enables you to block the access of a sub-workspace to the workspace's users, for instance, or to deeply modify the access rights in the sub-workspace.

To block rights inheritance:

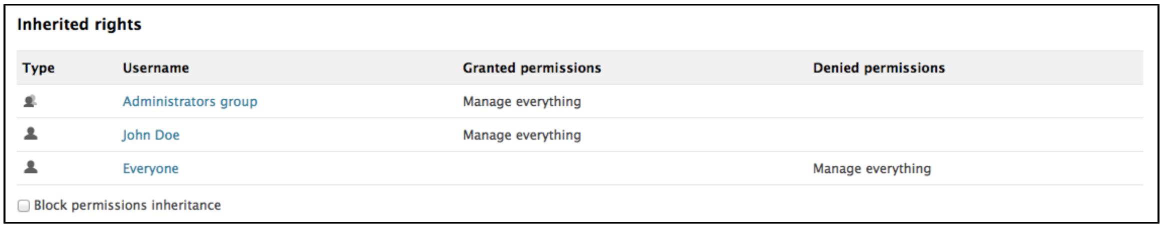
1. Click on the **Manage** tab of the space of which you want to the access rights.
   The **Access Rights** sub-tab is displayed.
2. Check the box **Block permissions inheritance** located under the **Inherited Rights** table.
   The inherited rights table is not displayed anymore.



You are added in the list of the local rights, like the administrators group.



In the **Access Rights** tab of the possible sub-spaces, a group Everyone is denied all rights.


Inherited rights

Type	Username	Granted permissions	Denied permissions
	Administrators group	Manage everything	
	John Doe	Manage everything	
	Everyone		Manage everything

Block permissions inheritance

You can now grant access rights to users.

Managing Users and Groups

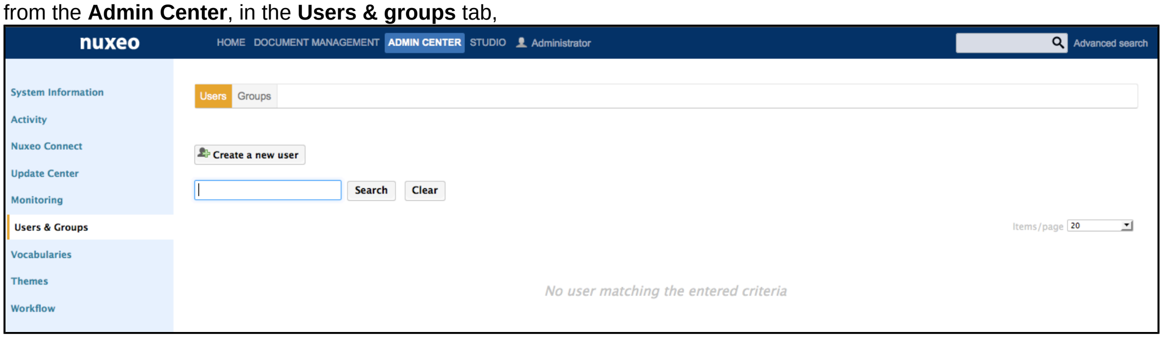
Only administrators and power users can manage users and groups. They can create new users and groups, modify their properties or delete them. It is also possible to connect the Platform to an external directory (LDAP directory for instance).

Users can only consult users and groups directories. Administrators and power users can create, edit and delete users and groups.

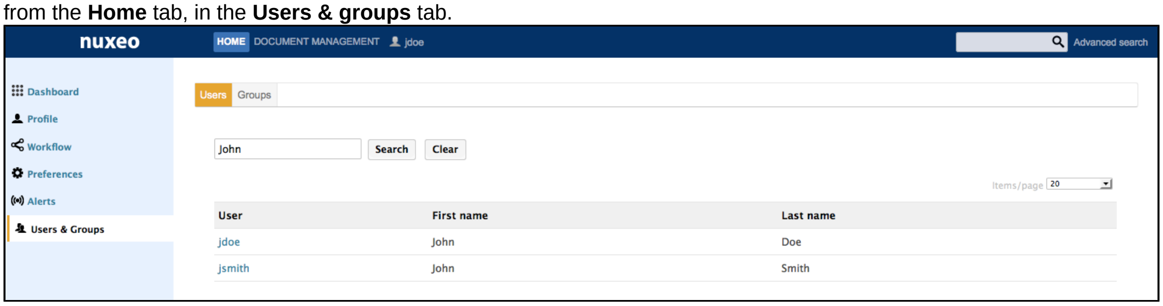
> When you use an external directory for users and groups, the actions available on users and groups are limited, even to administrators.

Users and groups management is available:

- from the **Admin Center**, in the **Users & groups** tab,



- from the **Home** tab, in the **Users & groups** tab.



On this page

Managing Users

User's Parameters

Field	Description
Username	The name the user will use to log in.
First name	First name of the user
Last name	Last name of the user
Company	Company or organization of the user
Email	email of the user This address is used for alerts.
Password	User's password
Password (Verify)	User's password
Groups for this user	Groups of which the user is a member. User must be at least in 'administrators' or 'members' group, or one of their sub-groups.
Virtual groups for this user	
Avatar	Image that represents the user in the application.
Birth date	User's birth date
Phone number	User's phone number
Gender	User's gender. Default value is Male.
Public profile	Visibility of the information about the user. By default, profiles are public.

Creating a User

Only administrators and power users can create new users.

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

Users must be at least in "administrators" or "members" group, or one of their sub-groups to be able to access the application's content.

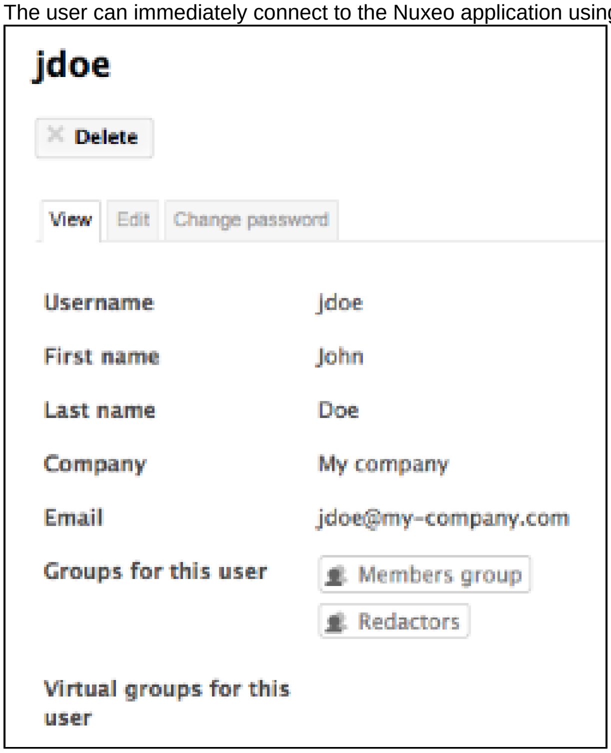
To create a user:

1. Click on the **Admin Center** main tab, and then on the **Users & groups** tab.
   The members management interface opens on the user directory search form.
2. Click on the **Create a new user** button.
3. Fill in the user creation form.
   Mandatory fields are indicated by a red asterisk.
   Click on the **Save** button.

The card of the new user is displayed. You can modify its properties and its password.

If you need to create several users click on the **Save and create** button. The user is saved and the user creation form is displayed so you can immediately create another user.

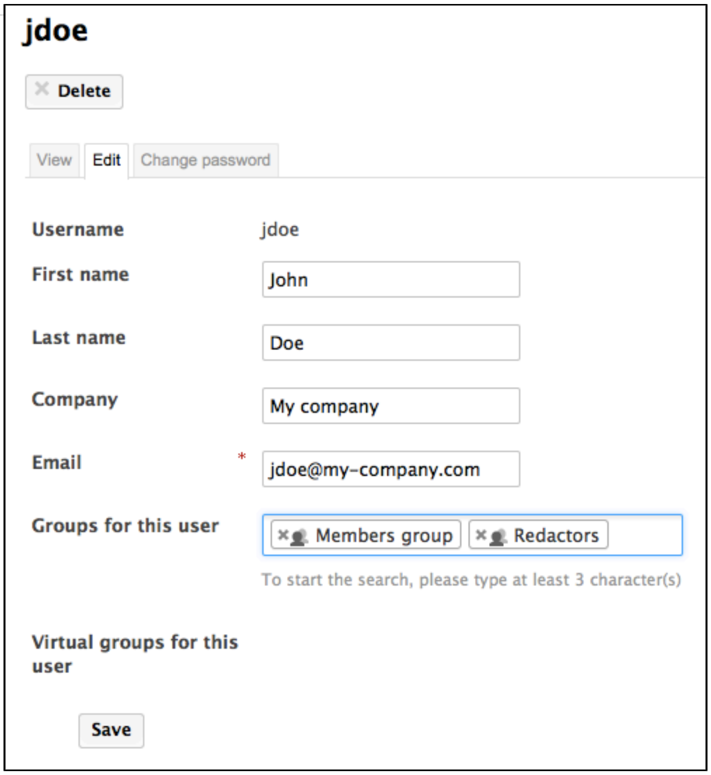
The user can immediately connect to the Nuxeo application using his or her username and password.



Editing a User's Properties

Only administrators and power users can modify other users' properties. But every user can modify his own properties from the **Profile** tab of his Home.

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



When you are using an external directory for users management, the **Edit** tab is not displayed as you cannot edit the users' properties (managed directly from the directory).

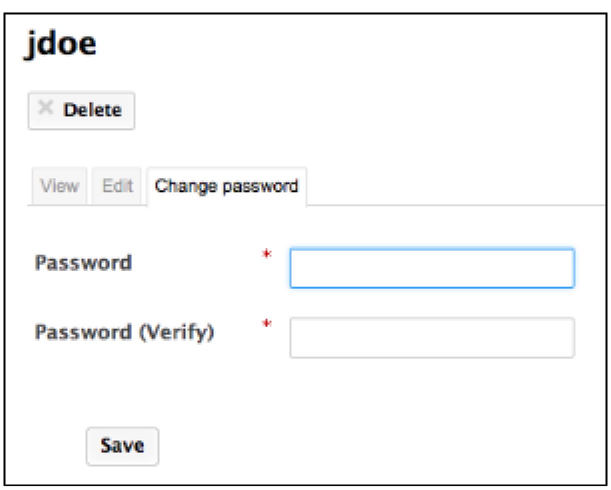
To modify a user's properties:

1. Click on the **Admin Center** main tab, and then on the **Users & groups** tab.
   The members management interface opens on the user directory search form.
2. Search a user and click on the user's name to open his or her card.
   The user's card is displayed.
3. Click on the **Edit** tab.
4. Modify the fields in the modification form.
5. Click on the **Save** button.
   The **View** tab is displayed with your modifications

Changing a User's Password

Only administrators and power users can modify other users' password. However every user can modify his or her own password from his/her **Home** > **Profile** tab.

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 **Admin Center** main tab, and then on the **Users & groups** tab.
   The members management interface opens on the user directory search form.
2. Search a user and click on the user's name to open his or her card.
   The user's card is displayed.
3. Click on the **Change password** tab.
4. Type the new password and confirm it.
5. Click on the **Save** button.
   The **View** tab is displayed.
   The user must use his or her new password the next time he or she logs in.

Deleting a User

Only administrators and power users can delete users.

> Deleting a user is a permanent action.

To delete a user:

1. Click on the **Admin Center** main tab, and then on the **Users & groups** tab.
   The members management interface opens on the user directory search form.
2. Search a user and click on the user's name to open his or her card.
   The user's card is displayed.
3. Click on the **Delete** button.
   A window pops up.
4. Click on the **OK** button.
   The user is deleted. He or she cannot log in to the Nuxeo application.

Managing Groups

Groups of users can be created and their properties modified directly in the Nuxeo Platform.

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:

- **members**: users in this group are the end-users users of the application.
- **power users**: users in this group are the functional administrators of the application. They have a restricted access to the Admin Center, the administration user interface of the Nuxeo Platform, from which they can manage users and groups, edit the vocabularies and define the default dashboard of users.
- **administrators**: users in this group are the technical administrators of the application. They have access to all the Admin Center features and are in charge of managing the application. Beside the functional administration features, they can edit the application configuration, install packages on the application, consult the application's statistics, restart the server, etc.

> **Default groups**
> Users must be in one of the groups "members" or "administrators" to be able to access content. Power users must be in both the "power users" and "members" groups.

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. You can create as many groups as needed.

Groups Parameters

Field	Description
Group name	The ID of the group. The ID cannot be modified.
Group label	The name of the group displayed to users.
Group's members	Users that belong to the group.
Sub-groups	Groups that belong to the group.

Creating a Group

Only administrators and power users can create groups of users.

To create a group of users:

1. Click on the **Admin Center** main tab, and then on the **Users & groups** tab.
   The directory opens on the **Users** tab.
2. Click on the **Groups** tab.
   A search form and the list of the existing groups is displayed.
3. Click on the **Create a new Group** button.
4. Fill in the creation form.
5. Click on the **Save** button.

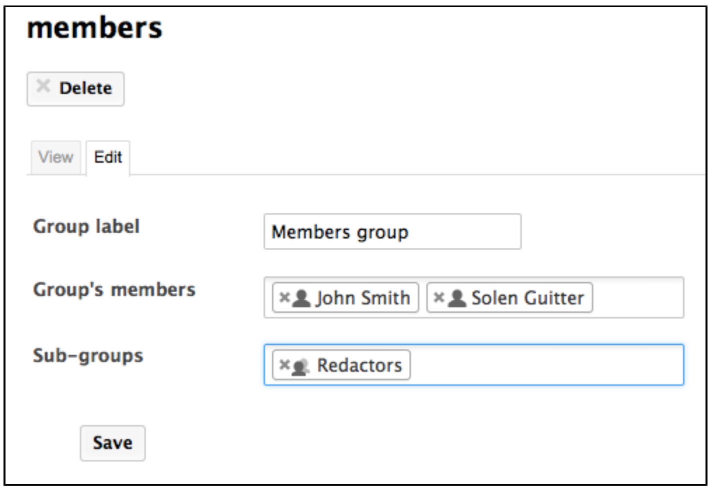
   > If you need to create several groups, click on the **Save and create** button. Your group is saved and the group creation form is displayed so you can immediately create another group.

   The **View** tab of the group's card is displayed.

Editing a Group

Only administrators and power users can modify groups.

Modifying groups most often 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 **Admin Center** main tab, and then on the **Users & groups** tab.
   The directory opens on the **Users** tab.
2. Click on the **Groups** tab.
   A search form is displayed.
3. Search a group and click on its name to open its card.
   The card displays the members and sub-groups of the group in the **View** tab.
4. Click on the **Edit** tab.
   The modification form is displayed.
5. Modify the group's members and click on the **Save** button.
   The **View** tab of the group is displayed with the modifications you just made.
   The new group members are immediately granted the group's access rights.
   The users who are no longer members of the group are denied group's access rights. However they still have their individual access rights.

Deleting a Group

Only administrators and power users can delete groups.

To delete a group:

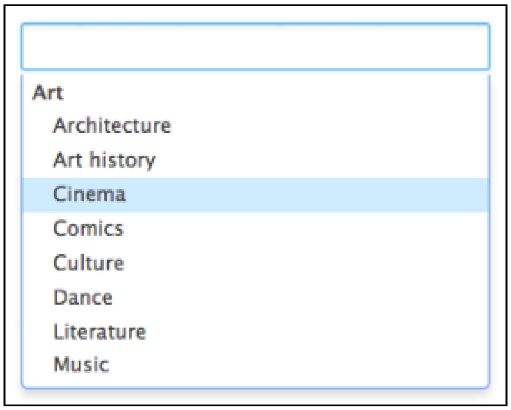
1. Click on the **Admin Center** main tab, and then on the **Users & groups** tab.
   The directory opens on the **Users** tab.
2. Click on the **Groups** tab.
   A search form is displayed.
3. Search the group to delete and click on its name to open its card.
   The card displays the members and sub-groups of the group in the **View** tab.
4. Click on the **Delete** button.
   A window pops up.
5. Click on the **OK** button.

The group search form is displayed.
6. The group is displayed and its members lose the group's access rights.

Managing Vocabularies

Only administrators and power users 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 called "l10nsubjects". First level is **Topic**. Second level is **Subtopic** and each entry is linked to a **Topic** entry.



Although the "l10nsubjects" vocabulary is used in most places to populate the Subject list (on edit forms and search forms for instance), the virtual navigations used the older "topic" and "subtopic" vocabularies. You need to use the same ID in all vocabularies to make the virtual navigations work.

Administrators and power users can only modify or delete vocabularies. They cannot create a new vocabulary from the user interface.

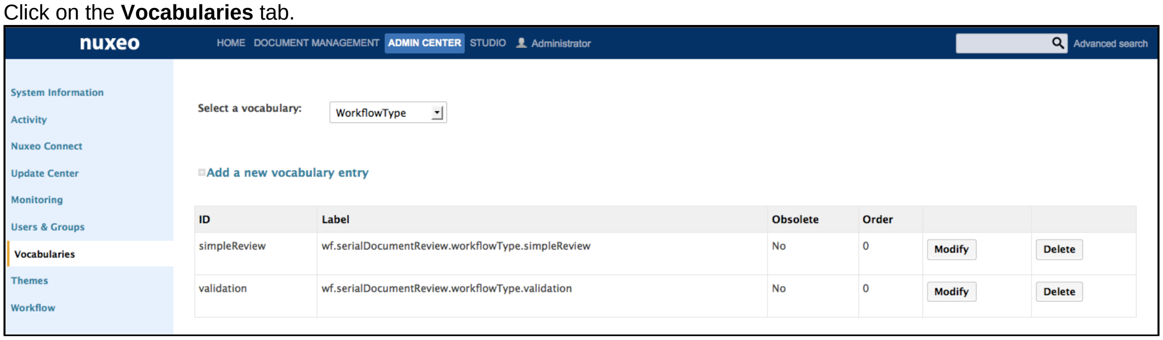
On this page

Consulting Vocabularies

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

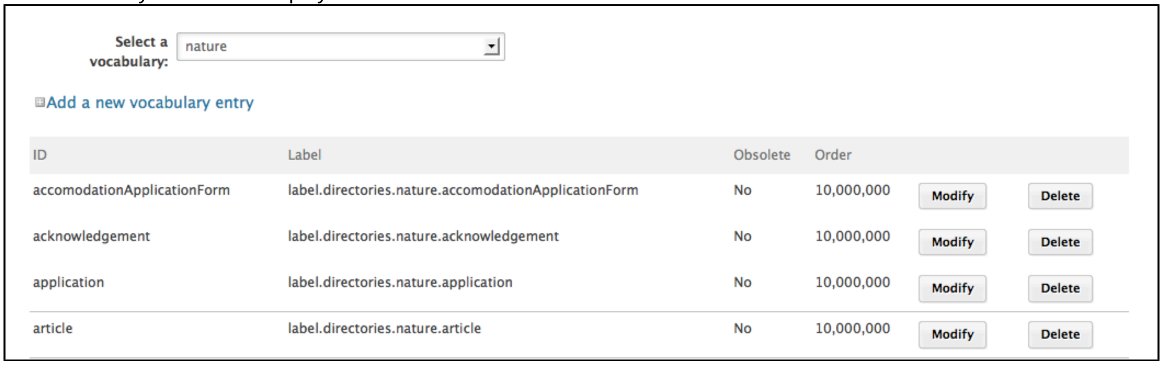
To consult a vocabulary or its entries:

1. Click on the **Admin Center** main tab.
2. Click on the **Vocabularies** tab.



The vocabularies drop down list is displayed. The first vocabulary's entries are displayed.
3. Select the vocabulary you want to consult in the drop down list.

The vocabulary entries are displayed.



By default, the labels of default vocabularies entries are the IDs of labels in properties files of source code.

Vocabulary Entries Parameters

Field	Description
ID	Unique identifier for the vocabulary entry. The ID is not displayed to users.
Parent	This field is only displayed on hierarchical vocabularies second level. It indicates to which 1st level entry the current value is linked.
Label	Value of the entry that will be displayed to users on the application.
Obsolescence	Indicates if the entry should be displayed in the available values on edition.
Order	Indicates the rank of the entry in the vocabulary. Order is set at "10,000,000" by default.

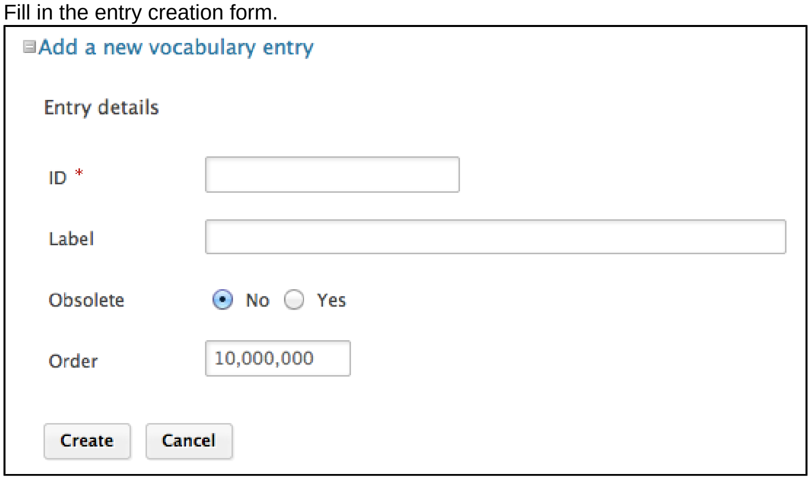
Editing Vocabularies

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

Adding a New Vocabulary Entry

To add an entry to a vocabulary:

1. Consult the vocabulary to add an entry to.
2. Click on the **Add a new vocabulary entry** link.
   The entry creation form is displayed under the link.
3. Fill in the entry creation form.



4. Click on the **Add** button.
   The new entry is displayed in the list of the vocabulary entries.

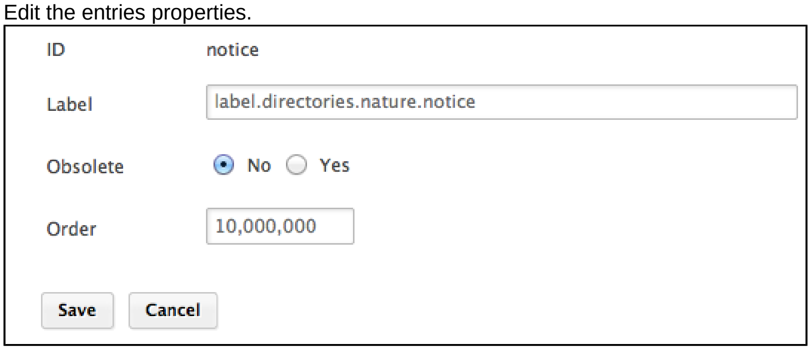
Editing a Vocabulary Entry

Editing a vocabulary entry can be:

- change its label,
- make it obsolete,
- change its order.

When you make an entry obsolete, it means that it will not be displayed in the available choices when you edit a document. But the value is still displayed on **Summary** tab of documents.

To modify a vocabulary entry:

1. Consult the vocabulary in which you want to edit the entry.
   Click on the **Modify** button corresponding to the entry you want to modify.
   The entry modification form is displayed.
2. Edit the entries properties.
   

3. Click on the **Save** button.
   The list of the vocabulary entries is displayed.

Deleting a Vocabulary Entry

Deleting a vocabulary entry is a permanent action.

To delete vocabulary entry:

1. Consult the vocabulary to delete an entry from.
2. Click on the **Delete** button of the entry to erase.
3. On the window that pops up, click on the **OK** button.
   The entry is permanently erased. The list of the vocabulary entries is displayed.

Managing Dashboards

The administrators of a Nuxeo application can set up the dashboards that will be displayed to users. On a default Nuxeo instance, administrators can:

- define the default user dashboard, which is the dashboard displayed to authenticated users by default and which they can customize ;
- add external gadgets that users will be able to display on their dashboard by customizing it .

When anonymous access to the Nuxeo Platform is enabled, administrators can define the anonymous dashboard, which is the dashboard displayed to users that are not logged in. The configuration of the anonymous dashboard works exactly like the default user dashboard.

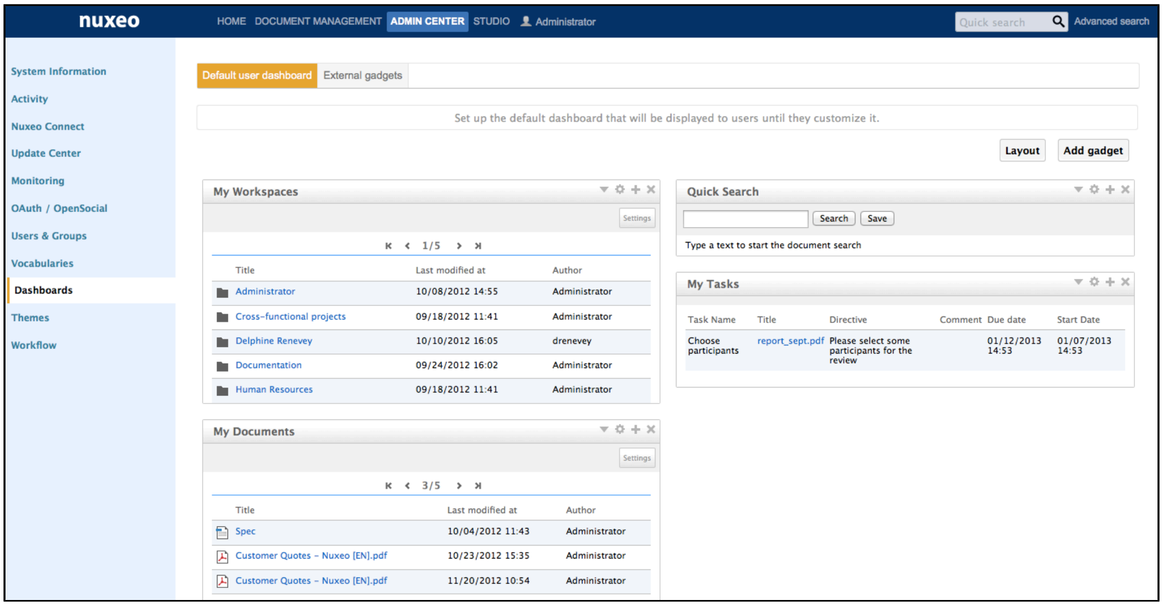
On this page

Defining the Default User Dashboard

The user default dashboard is used to generate the user's dashboard the first time the user logs in, and when the user clicks on the "Restore default" button on his dashboard. Both administrators and power users can define this default dashboard.

The Nuxeo Platform includes a dashboard that is proposed as the default user dashboard. You can edit this default user dashboard to make it adapted to your organization and users. Editing the default user dashboard works the same way users can edit their dashboard. You can:

- Change the dashboard layout ,
- Add or remove gadgets ,
- Edit widgets .



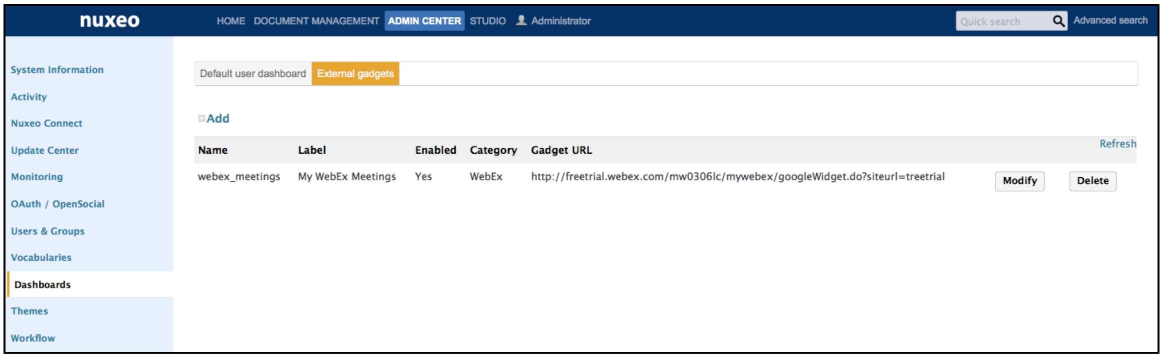
Managing External Gadgets

As an administrator, you can add and manage gadgets from other applications or websites so that they are available for users when they click on the "Add gadget" button.

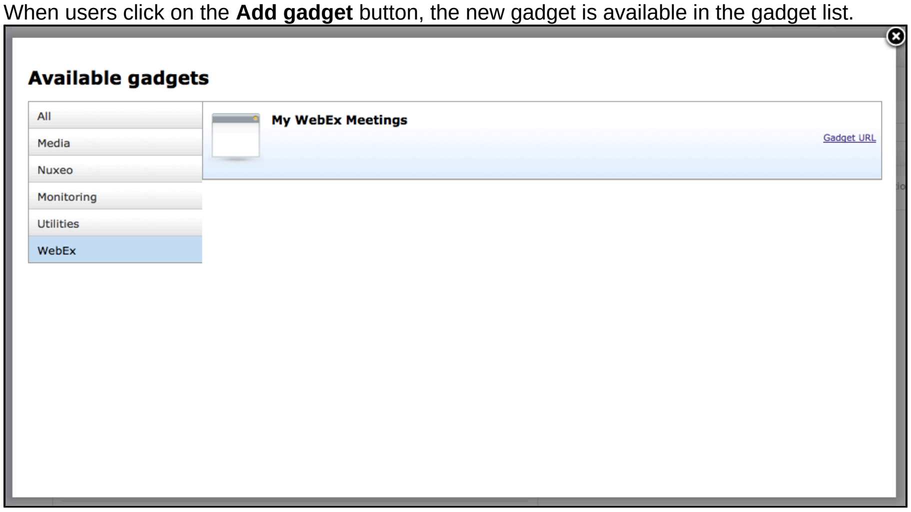
Adding External Gadgets

To add an external gadget:

1. On the website which provides the external gadget, copy the gadget's URL.
2. Log in to Nuxeo.
3. In the Admin Center, click on the **Dashboards** tab.
4. Click on the **External gadgets** tab.
   The **Add** link is displayed.
   If you already added some external gadgets, the list of configured gadgets is displayed.
5. Click on the **Add** link
   The form to add a gadget is displayed.
6. Fill in the form (see below for gadget parameters).
7. Click on the **Create** button.
   The new gadget and its properties is displayed in a table.



When users click on the **Add gadget** button, the new gadget is available in the gadget list.



External gadget properties

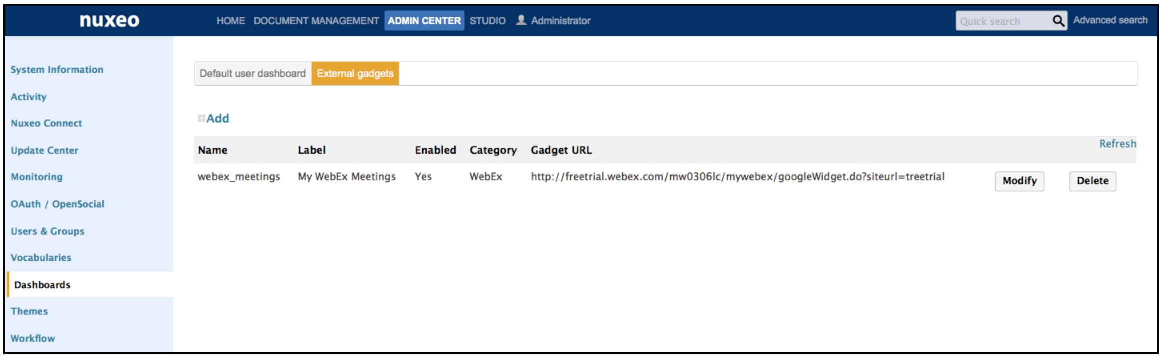
Field	Description
Name	The technical name of the gadget, that can used by the administrator.
Label	Title of the gadget displayed in its title bar when it's used on the dashboard.
Enabled	Select if your gadget should be displayed in the list of gadgets.
Category	Category in which the gadget will be available. You can either type the name of an existing category or type the name of a new category. Default categories are: Nuxeo, Media, Monitoring, Utilities, Collaborative.
Gadget URL	Type the URL of the widget
Icon URL	URL of the icon to be displayed on the gadget selection pop up if the external gadget has no icon provided by default.

Modifying an External Gadget

You can edit the external gadgets you have added at any time. Editing an gadget means changing its properties (for instance updating it).

To edit an external gadget:

1. In the Admin Center, click on the **Dashboards** tab.
2. Click on the **External gadgets** tab.
   The list of available gadgets is displayed.



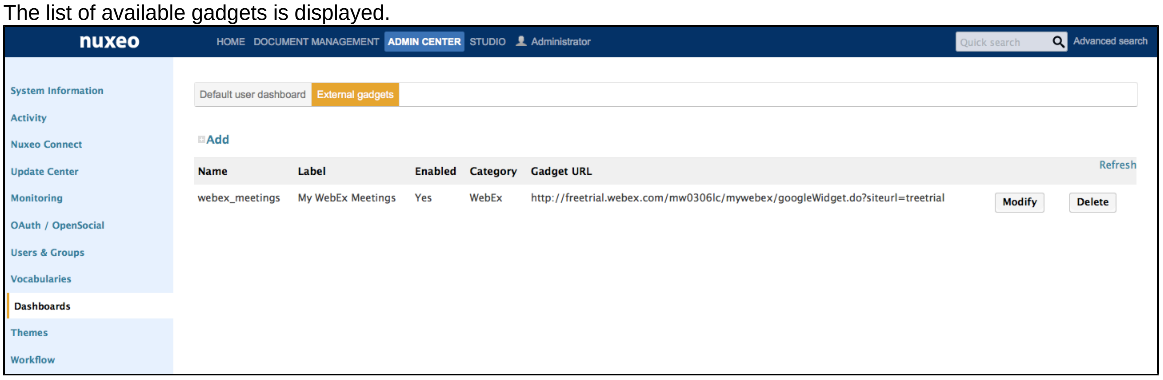
3. Click on the **Modify** button of the widget to edit.
   The gadget edit form is displayed.
4. Modify the properties you want to change.
5. Click on the **Save** button.

Deleting an External Gadget

When you delete an external gadget, it is **not** removed from the dashboard of the users who already added it.

To delete an external gadget:

1. In the Admin Center, click on the **Dashboards** tab.
2. Click on the **External gadgets** tab.
   The list of available gadgets is displayed.



3. Click on the **Delete** button of the gadget to remove.
   A confirmation window pops up.
4. Click on **OK** to confirm gadget deletion.
   The gadget is deleted and is not in the gadget list anymore. However it is still displayed on the dashboard of users who added it to their dashboard.

Other Dashboard Related Pages
• Social Workspaces Overview

Managing Authentication with Other Applications

The Platform offers the possibility to use external gadgets in the Nuxeo Platform from the user interface and to use Document Management's gadgets in other websites or applications.

External gadgets can be from public websites and applications, but you can also add gadgets from websites or applications that require you to log in, like a gadget from your email provider. If you want to use Nuxeo's gadgets in other applications, authentication is required as well.

OAuth is a protocol that enables external applications and Nuxeo DM to access each other's data. Users can allow "consumer" (ie external) applications and websites to access the Nuxeo DM data, Nuxeo DM being the "provider".

In this section, we will take the example of iGoogle, that we want to authorize to display Nuxeo's data in a gadget.

To authorize external application to access Nuxeo DM content:

1. In the Admin Center tab, click on the **OpenSocial / OAuth** tab.

2. Click on the **Consumer** tab.
3. Click on the **Add** link.
   The form to add a new consumer is displayed.
4. Fill in the form with the parameters below.
5. Click on the **Create** button.

Google consumer parameters

Field	Parameter
Consumer Key	www.google.com
Consumer Secret (HMAC Signature)	Leave empty
Consumer Public Key (RSA Signature)	

```
-----BEGIN CERTIFICATE-----
MIIDBDCCAm2gAwIBAgIJAK8dGINfkS
THMA0GCSqGSIb3DQEBBQUAMGAxCzAJ
BgNV
BAYTAlVTMQswCQYDVQQIEwJDQTEWMB
QGA1UEBxMNTW91bnRhaW4gVmlldzET
MBEG
A1UEChMKR29vZ2xlIEluYzEXMBUGA1
UEAxMOd3d3Lmdvb2dsZS5jb20wHhcN
MDgx
MDA4MDEwODMyWhcNMDkxMDA4MDEwOD
MyWjBgMQswCQYDVQQGEwJVUzELMAkG
A1UE
CBMCQ0ExFjAUBgNVBAcTDU1vdW50YW
luIFZpZXcxEzARBgNVBAoTCkdvb2ds
ZSBJ
bmMxFzAVBgNVBAMTDnd3dy5nb29nbG
UuY29tMIGfMA0GCSqGSIb3DQEBAQUA
A4GN
ADCBiQKBgQDQUV7ukIfIixbokHONGM
W9+ed0E9X4m99I8upPQp3iAtqIvWs7
XCbA
bGqzQH1qX9Y00hrQ5RRQj8OI3tRiQs
/KfzGWOdvLpIk5oXpdT58tg4FlYh5f
bhIo
VoVn4GvtSjKmJFsoM8NRtEJHL1aWd+
+dXzkQjEsNcBXwQvfDb0YnbQIDAQAB
o4HF
MIHCMB0GA1UdDgQWBBSm/h1pNY91bN
fW08ac9riYzs3cxzCBkgYDVR0jBIGK
MIGH
gBSm/h1pNY91bNfW08ac9riYzs3cx6
FkpGIwYDELMAkGA1UEBhMCVVMxCzAJ
BgNV
BAgTAkNBMRYwFAYDVQQHEw1Nb3VudG
FpbiBWaWV3MRMwEQYDVQQKEwpHb29n
bGUg
SW5jMRcwFQYDVQQDEw53d3cuZ29vZ2
xlLmNvbYIJAK8dGINfkSTHMAwGA1Ud
EwQF
MAMBAf8wDQYJKoZIhvcNAQEFBQADgY
EAYpHTr3vQNsHHHUm4MkYcDB20a5Kv
cFoX
gCcYtmdyd8rh/FKeZm2me7eQCXgBfJ
qQ4dvVLJ4LgIQiU3R5ZDe0WbW7rJ3M
9ADQ
FyQoRJP8OIMYW3BoMi0Z4E730KSLRh
6kfLq4rK6vw7lkH9oynaHHWZSJLDAp
17cP
j+6znWkN9/g=
-----END CERTIFICATE-----
```


Description	Leave empty
Allow 2 legged auth	Leave default value.
Callback URL	http://oauth.gmodules.com/gadgets/oauthcallback
Allow OAuth verifier check bypass	Check "Yes".
Enabled	Check "Yes".

For more information, take a look at these pages:

- How OpenSocial and OAuth are integrated in the Nuxeo applications,
- How to use OAuth.

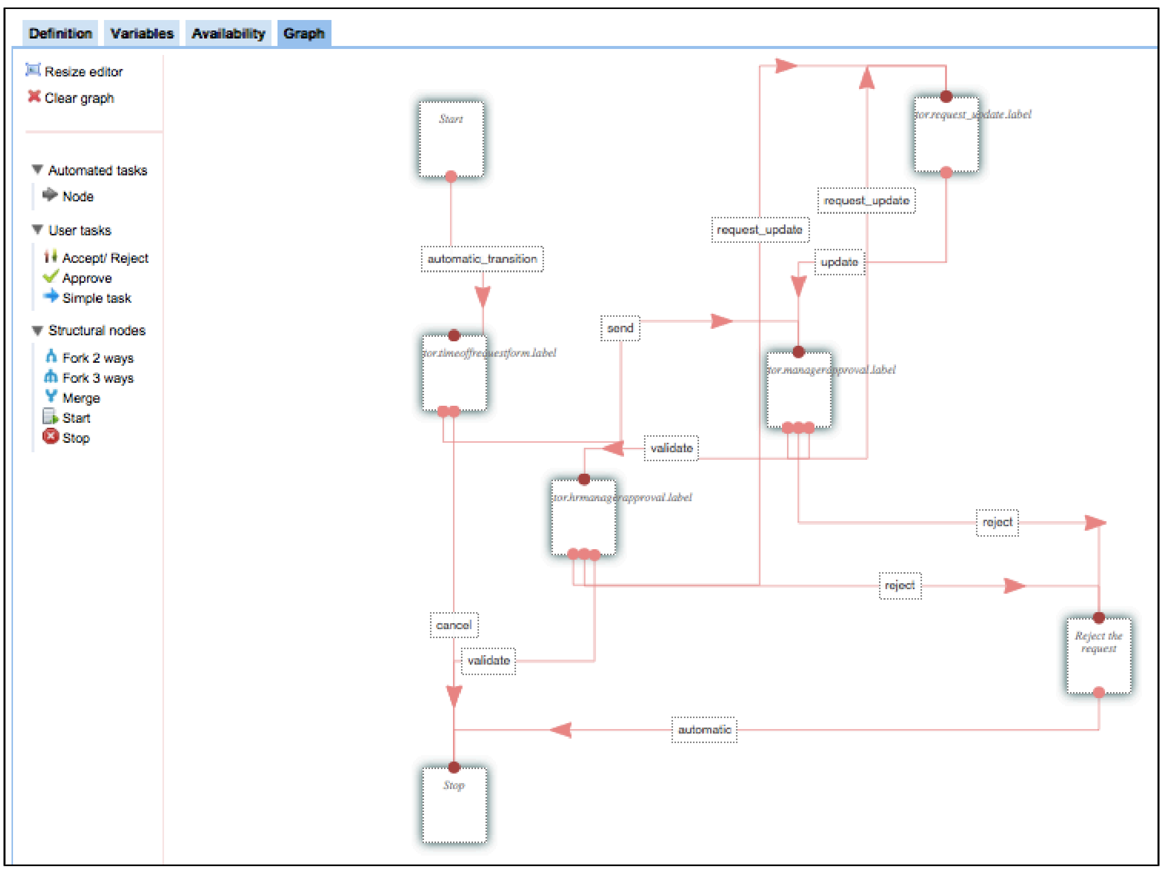
Case Management with the Nuxeo Platform

The Nuxeo Platform used to feature a module dedicated to case management, called Case Management Framework. From the version 5.6 of the platform, the technology on which CMF was based, called Content Routing, has been integrated in the Platform by default to enable users to create their own routes without installing a specific module and leaving their regular content management environment.

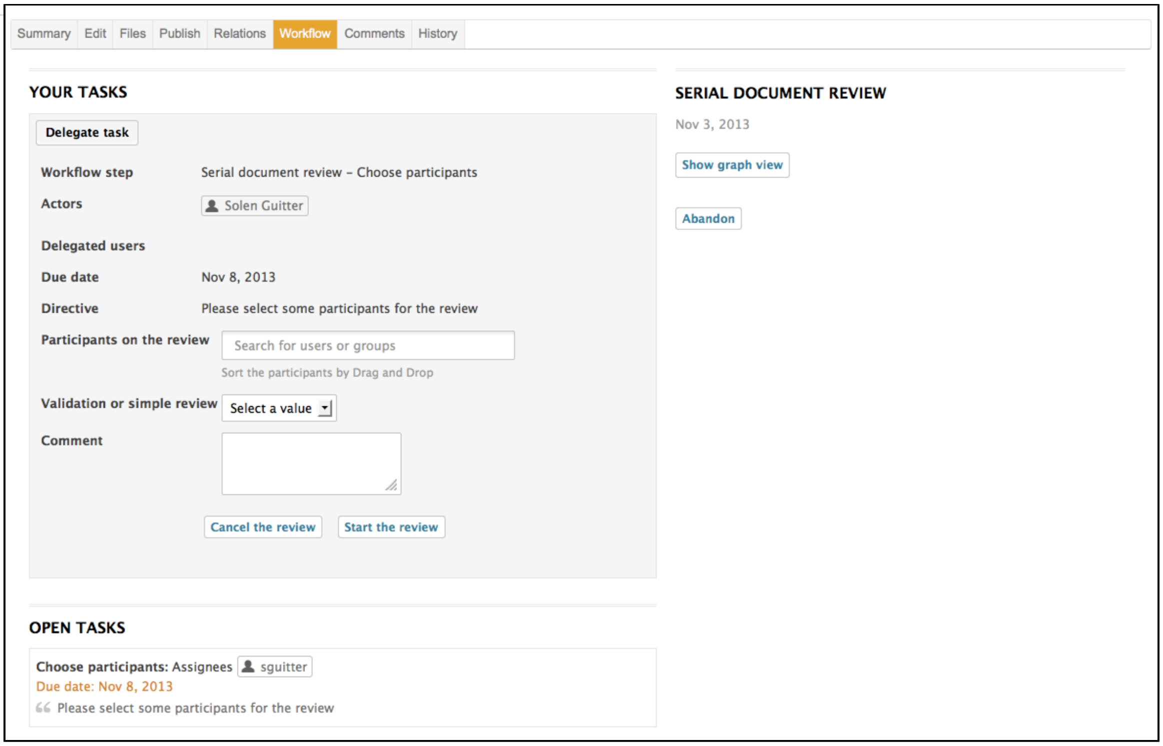
So how to do case management with the Nuxeo Platform?
It takes two steps:

1. Developers design the different workflows you need in Nuxeo Online Services.
2. End users select the workflow they want to start and which users participate.

On the Studio side, developers can define the different steps of the workflow, how to go from a step to another, the different branches of the workflow, the actions available to users, their tasks etc. Their can also choose what information the Workflow tab of document should present, and how.
Documentation: Workflows in Studio



After the Studio customizations have been deployed, users can make the documents go through the workflows from their usual Nuxeo Platform environment. An example of workflow is available by default on the Nuxeo Platform
Documentation: Default Nuxeo Platform Workflows



Marketplace Add-Ons

The Nuxeo Marketplace is Nuxeo's ECM application store. It offers plugins and packages, called Nuxeo Packages, that enable you to easily add features to your Nuxeo application. The list of available Nuxeo Packages is available to everyone, but some packages require a Nuxeo Connect account to be able to install packages.

The Marketplace offers packages aimed at developers and other that provide new features to end-users. Most of the packages can be installed from the Update Center very easily and don't require any additional installation or configuration step. However, some other addons, typically connectors with other systems, involve some additional configuration.

Each package has a dedicated page on the Marketplace, that describes the features the package enables, if there are prerequisites, etc. Here is the information available about the packages from the Marketplace:

- **Production state**: Indicates if the package is approved by Nuxeo or is still in testing phase.
- **Certification status**: Indicates if the packages has been certified by Nuxeo or not.
- **Vendor support**: Indicates if the package is covered by Nuxeo Connect support contracts.
- **Type**: Possible types are: addons will provide new features, hotfixes provide corrections, and Studio packages install your Studio customizations in your instance.
- **Last version**: Most recent version number of the plugin.
- **Updated**: Date on which the package was last updated.
- **Target platforms**: Nuxeo applications on which you can install the package.
- **License**: License applied to the package.
- **Categories**: List of categories the package belongs to.
- **Rating**: Comments on the package.
- **Vendor**: Name of the person or company who developed the package.
- **Package dependencies**: Indicates if there are some requirements for the package to be correctly installed.
- **Hot-reload support**: Indicates if the plugin is immediately functional (i.e. no server reboot required).

Although most packages are installed in a few clicks from the Update Center, some of them require specific installation or configuration steps. Below is the list of available Nuxeo Packages and their documentation.

Here is the list of Nuxeo Platform add-ons available on the Nuxeo Marketplace:
Released for 5.8

Package	Public / Registered access	Documentation	Comments (especially about latest release)
Amazon S3 Online Storage	Registered access	Administration documentation	Released for 5.8

Automated Document Categorization	Public	Administration documentation User documentation	Released for 5.8
Bulk document importer	Registered access	Developer documentation	Released for 5.8
CAS2 Authentication	Registered access	Administration documentation	Released for 5.8
Configuration Management	Registered access	Studio documentation	Released for 5.5
Digital Signature	Registered access	Developer documentation User documentation	Released for 5.8
Display email in user suggestion	Registered access	Administration documentation (5.6) User documentation (5.6)	Released for 5.6 No more release unless requested
Document access tracking	Public	Administration documentation User documentation	Released for 5.8
Easy Bookmark Plugin	Public	User documentation (5.4)	Released for 5.4 No more release unless requested
Frequently Asked Questions	Public	User documentation (5.5)	Released for 5.5
Nuxeo Agenda	Public	Administration documentation User documentation	Released for 5.8
Nuxeo - BIRT Integration	Registered access	Developer documentation User documentation	Released for 5.8
Nuxeo CMF	Public	Developer documentation (5.5) User documentation (5.5)	Last release with the Nuxeo Platform 5.5 Deprecated since 5.6
Nuxeo CSV	Public	Administration documentation User documentation	Released for 5.8
Nuxeo DAM	Public	Developer documentation User documentation	Automatically released with the Platform
Nuxeo DAM PDF Export	Public	Administration documentation User documentation	Released for 5.8
Nuxeo Diff	Public	Developer documentation (TODO) User documentation	Released for 5.8 Included in Nuxeo DM since 5.8
Nuxeo DM	Public	User documentation	Automatically released with the Platform
Nuxeo Document Count	Registered access		Released for 5.5 Included in Nuxeo Quota since 5.6
Nuxeo Drive	Public	Developer documentation User documentation	Released for 5.8
Nuxeo DuoWeb Two Factors Authentication	Public	User documentation	Released for 5.8

Nuxeo Exalead Connector	Registered access		Released for 5.6 No more release unless requested
Nuxeo Flex connector	Registered access	Developer documentation (5.4.2)	Released for 5.4.2 No more release unless requested
Nuxeo Flex samples	Registered access	Developer documentation (5.4.2)	Released for 5.4.2 No more release unless requested
Nuxeo Groups and Rights Audit	Registered access	Administration documentation User documentation	Released for 5.8
Nuxeo GSA Connector	Registered access	Administration documentation (5.5)	Released for 5.5 No more release unless requested
Nuxeo Indexing Gateway	Registered access		Released for 5.5
Nuxeo jBPM	Registered access	Administration documentation User documentation	Released for 5.7.2 No more release unless requested
Nuxeo Jenkins Report	Public	Administration documentation User documentation	Released for 5.8
Nuxeo Multi-tenant	Registered access	Administration documentation User documentation	Released for 5.8
Nuxeo Platform User Registration	Public	Administration documentation User documentation	Released for 5.8 Included in the Social Collaboration module since 5.7
Nuxeo Poll	Registered access	Administration documentation User documentation	Released for 5.8
Nuxeo Quality Systems Engineering	Registered access		Released for 5.4.1
Nuxeo Quota	Public	User documentation	Released for 5.8
Nuxeo REST API	Public	Developer documentation	Released for 5.8
Nuxeo RSS Reader	Registered access	Administration documentation User documentation	Released for 5.8
Nuxeo Social Collaboration	Public	User documentation	Automatically released with the Platform
Nuxeo Sites and Blogs	Public	Administration documentation User documentation	Released for 5.8
Nuxeo Web Mobile (DM)	Public		Released for 5.8
Nuxeo Web Mobile (SC)	Public		Released for 5.8
Platform Explorer	Public	User documentation	Released for 5.8
Resources Compatibility	Public	Developer documentation	Released for 5.8
Semantic entities	Public	Administration documentation (5.4) User documentation (5.4)	Released for 5.4.1 No more release unless requested

Shibboleth Authentication	Registered access	Administration documentation	Released for 5.8
Smart Search	Public	Developer documentation User documentation	Released for 5.8
Template Rendering Addon	Public	User documentation	Released for 5.8
Unicolor Flavors Set	Public	Administration documentation User documentation	Released for 5.8
Validator resolved by permission workflow	Public	User documentation (5.5)	Released for 5.5 Useless on 5.7 until updated to use routing.

Use: "In progress (JC)", "Ready for x.y.z" or "Released for x.y.z" or any other relevant comment.

Automated Document Categorization

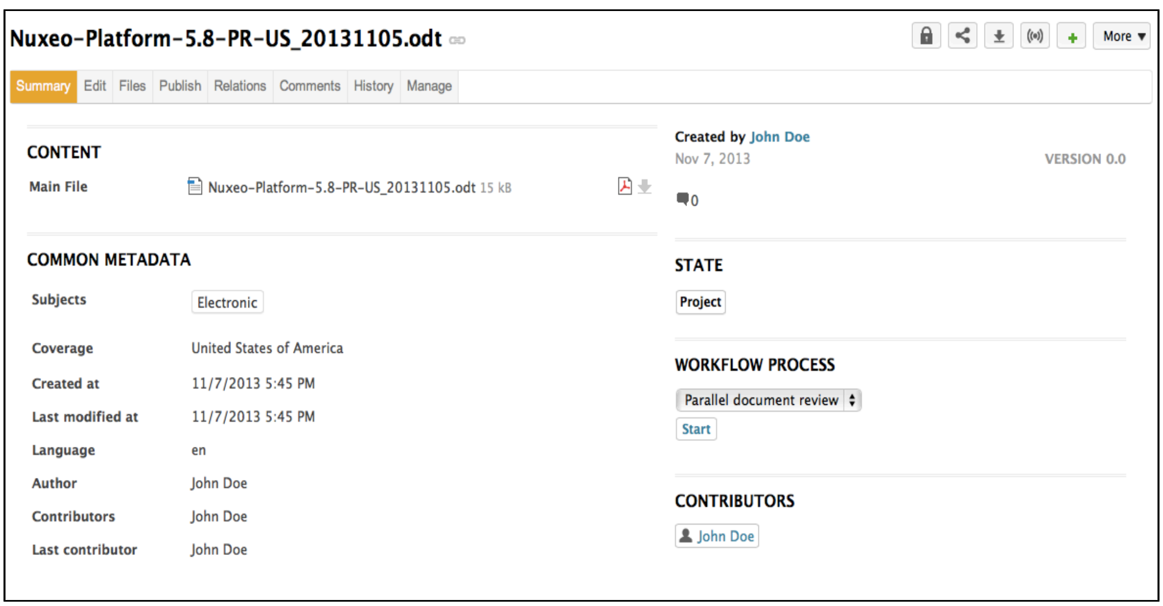
The Automated Document Categorization package enables the system to automatically fill in some metadata of the document when it is created, from the document's content.

When a user creates a new document, the text of the note or of the file is analyzed and the system fills some metadata automatically from this text. This occurs when documents are created using all the means provided by Nuxeo DM (the **New** button, **Import a file** button and Drag&Drop).

The metadata that the system fills in automatically are:

- language
- coverage
- subjects

You can at anytime edit the document to change and complete the metadata of the document. The system fills the metadata at document creation, but then it doesn't update or control them when the document is edited.



Other documentation about this package

- Automated Document Categorization dev documentation

Digital Signature

The Digital Signature addon introduces PDF signing capabilities to the Nuxeo Platform. This addon also provides generation of user certificates, which are required for document signing.

The Nuxeo Platform Digital Signature addon allows you to:

- download the PDF for previewing,
- download the root certificate to install inside your PDF viewer for verifying any future certificates,
- navigate to certificate generation,
- sign the PDF,
- view existing certificates without opening the signed PDF.

Digital Signature Concepts

Principles

- Documents are signed to protect them from modification, especially at critical stages in their life cycle.
- Document- and user-certification in the Nuxeo Platform follow principles of asymmetric cryptography, PKI & the X.509 standards.
- To sign a document, a user needs a personal certificate.
- Each user can create her own certificate.
- Certificates are issued by Certificate Authorities (CAs).

In this section

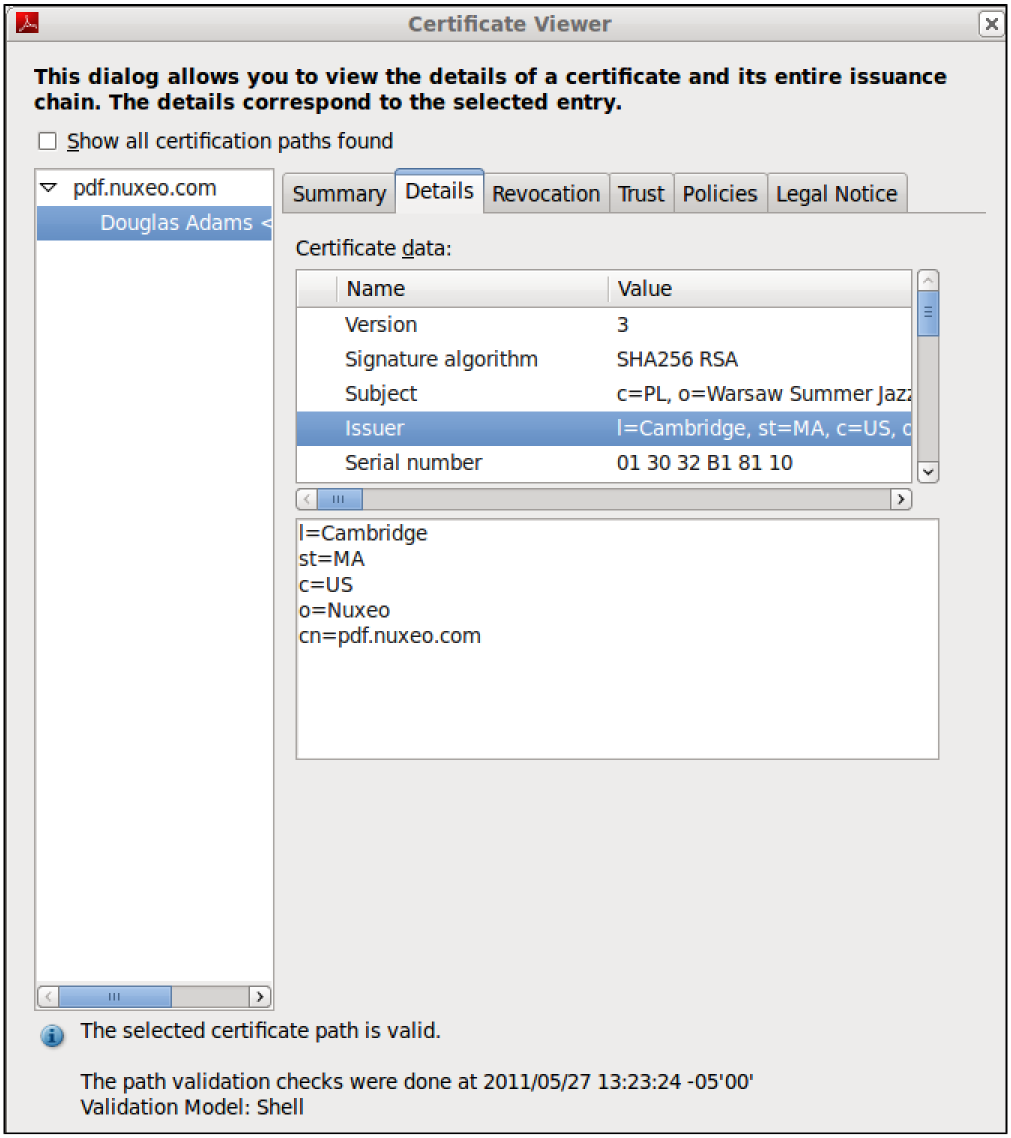
What Is a Digital Signature?

... or why sign your documents digitally?

Digital signatures uniquely identify the document signer. They provide a similar functionality to handwritten signatures on paper, and are a convenient alternative to signing and scanning documents when a digital version of a document is required. Digital signatures are meant to assure authenticity and integrity of documents, that is to verify that the document originator - or signer - is who they claim to be, and to ascertain that a document has not been tampered with between the moment of signing and the subsequent viewing.

What Is a Digital Certificate?

Before you sign a document you need a digital certificate. Certificates are attached to documents to verify the identity of the signer, that is to check that the person signing the message is who they claim to be. Certificates are issued by Certificate Authorities (CA, also known as Issuer). To verify that a certificate has not been tampered with, it has to be validated against the CA's public key. If this verification is passed it means that the CA certifies the authenticity of the signer. Digital certificates are formatted using PKI standards, the most common of them is X.509, which is also used in this addon.



The Local CA and the Root CA

Root Certificate Authority

The highest level certificates are created by root Certificate Authorities (CAs) which are supposed to be trusted publicly. No higher authority can certify the root certificates: those are the top-level certificates.

You can see examples of those in your browser, under the certificate authorities/ CA section.

Here are some of the more popular ones:

- Equifax Secure CA,
- VeriSign Class 3 Public Primary Certification Authority,
- Visa eCommerce Root,
- Deutsche Telekom Root CA 2.

Local Certificate Authority

Your Local Certificate Authority (CA) will be used to sign user certificates. The local CA certificate can either be signed by a higher-level certificate authority, or be self-signed. The local CA certificate will be created inside the system hosting your Nuxeo Platform instance.

> The default Local CA that comes with our plugin is just an example certificate to be used for initial setup testing, and it should not be used for signing production documents.

Certification Chains

Now let's consider the following relationships:

1. The document signature includes => the signer's certificate (user certificate).
2. User certificate was signed with => your local CA certificate.
3. Your local CA certificate was signed by => a higher level CA certificate.
4. The higher level CA certificate was signed by => a still higher CA certificate (… and so on… …and then, finally).
5. A very high level CA certificate was signed by => the root CA certificate.

The root CA certificate closes the chain that leads down to the user's certificate.

Now, instead of verifying all the intermediary certificates, it is enough for your PDF viewer to have the root Certificate Authority verify it for you, via the sequence of intermediary CAs.

Root certificates are usually already present in popular PDF viewers and browsers, and if not, they can be updated automatically provided your software has been set up properly.

CA-Signing vs Self-Signing

… as applied to your local CA certificate.

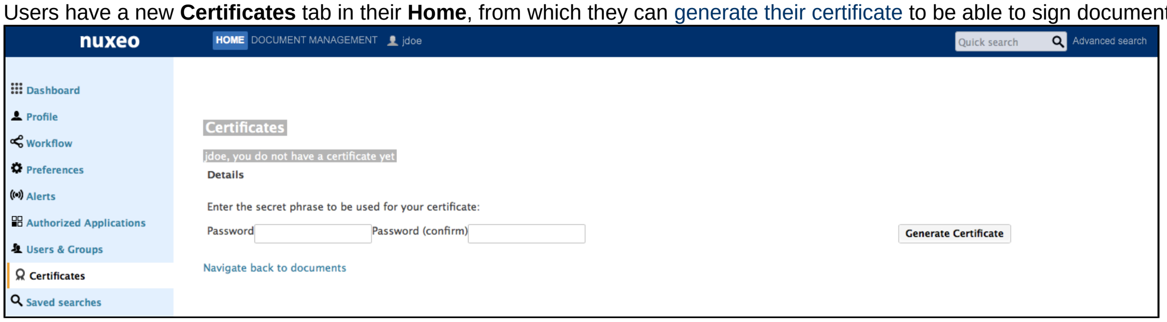
If your local CA certificate was signed by a certificate authority, the users usually don't have to install your company's certificate in their browsers to verify the signed documents.

On the other hand, if your local CA was self-signed, the CA-certificate has to be manually installed in the PDF viewer prior to verifying signatures. This has to be done only once per PDF viewing program and an example of certificate installation in a PDF viewer has been presented in our documentation.

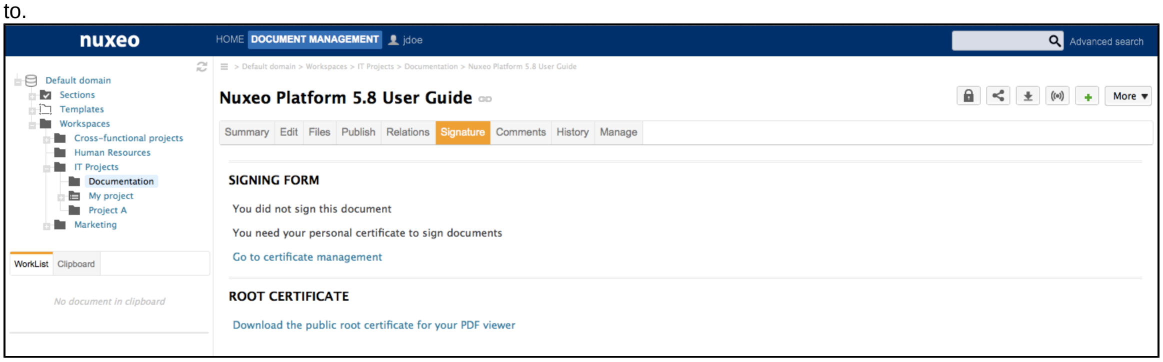
Using the Digital Signature Addon

When the Digital Signature addon is installed on your Nuxeo Platform, you get some new tabs in your Nuxeo Platform interface:

- Users have a new **Certificates** tab in their **Home**, from which they can generate their certificate to be able to sign documents.



- Files documents have a new **Signature** tab, from which they can either see the signatures or sign the document if they have the right to.



Top-Level View

From a high-level functional point of view, here is what users need to be able to do using the digital signature addon:

1. User A creates a certificate.
2. User A signs a document.
3. User B installs the root certificate in a PDF viewer.
4. User B opens a document, previews the document with a visible signature and can check its authenticity against the root certificate.

Generating Your Certificate

To be able to sign documents, users need to have a certificate. Every user of the application can have a certificate. However, this not automatic: users have to generate it. When users generate their certificate, they are asked to choose a password, that will be required to sign the document.

> Make sure you remember your password (or store it secured) as there is currently no mechanism for resetting lost passwords.

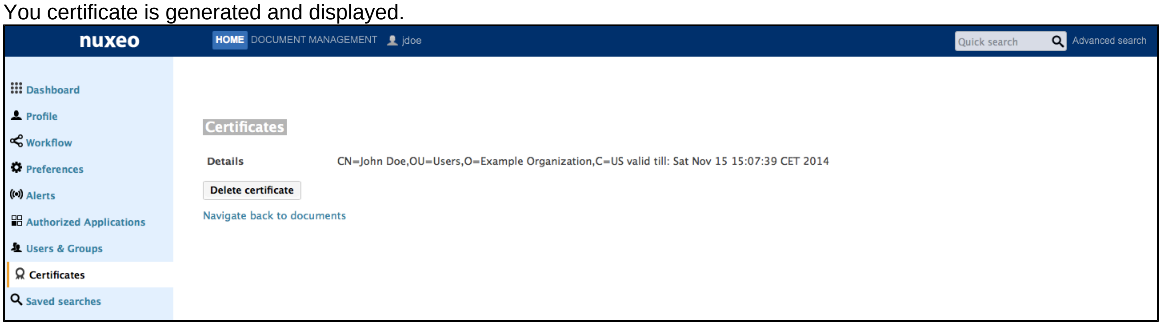
The certificate generation relies on two sets of information:

- User's information: user's first name, last name and email address. The email address is used to check the user's unicity.
- Global company information entries configured by the system administrator.

To generate your certificate:

1. Click on the **Home** main tab.
2. Click on the **Certificates** tab, where you can generate your certificate.

   > If you have no certificate yet, a link to the **Certificates** tab is displayed directly from the document's **Signature** tab.

   A form to generate your certificate is displayed. If you already generate your certificate, it is displayed instead of the generation form.
3. Type and confirm the password that you will be asked when you sign documents.
4. Click on the **Generate certificate** button.
   You certificate is generated and displayed.
   

Signing a Document

Only users with "Write" permission can sign documents.

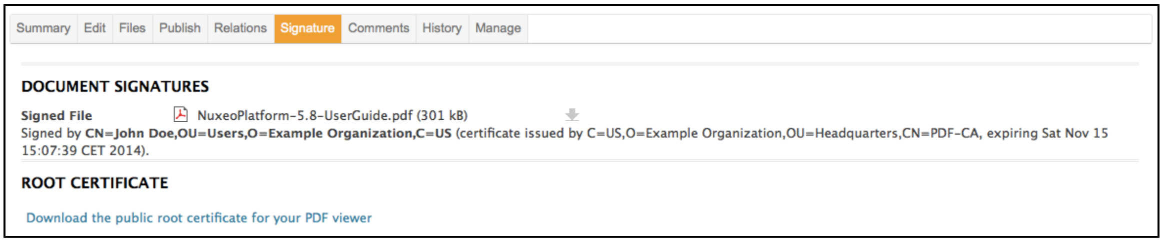
To sign a document:

1. Click on the **Signature** tab of the document.
   The signing form is displayed, below the Main file and Root Certificate sections.

   > You must have a certificate to sign documents.
   > If you haven't generated your certificate yet, you are displayed a link to the certificate management instead of the signing form.

2. Type a comment in the "Signing Reason" text area.
3. Type your password in the "Certificate Password" field.
4. Click on the **Sign now** button.
   Your signature is displayed on the **Signature** tab instead of the signing form. It is composed of your certificate, your organization's certificate, and the expiration date of your certificate.

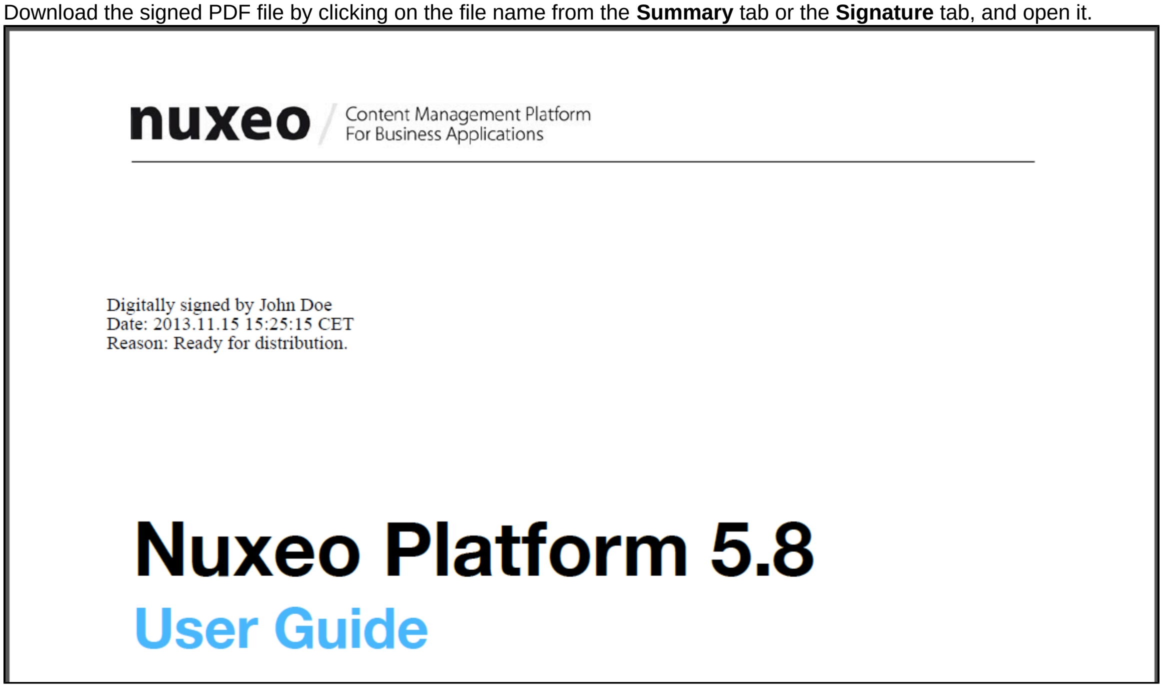


The signed PDF version of the document is attached to the document. It is displayed on the **Signature** tab, the **Summary** tab and the **Files** tab.
The signing of the document is logged in the **History** tab.

Verifying the Signature of the PDF File

To verify the signature of the PDF, you need to:

1. Install the public root certificate available from the **Root Certificate** section of the **Signature** tab:
    a. Click on the **Download the public root certificate for your PDF viewer** link to download the certificate.
    b. Follow your operating system's usual certificate installation steps.
2. Download the signed PDF file by clicking on the file name from the **Summary** tab or the **Signature** tab, and open it.



References

- http://download.oracle.com/javase/1.5.0/docs/guide/security/cert3.html
- http://en.wikipedia.org/wiki/Digital_signature
- http://www.nuxeo.com/blog/digital-signatures-within-nuxeo-document-management/

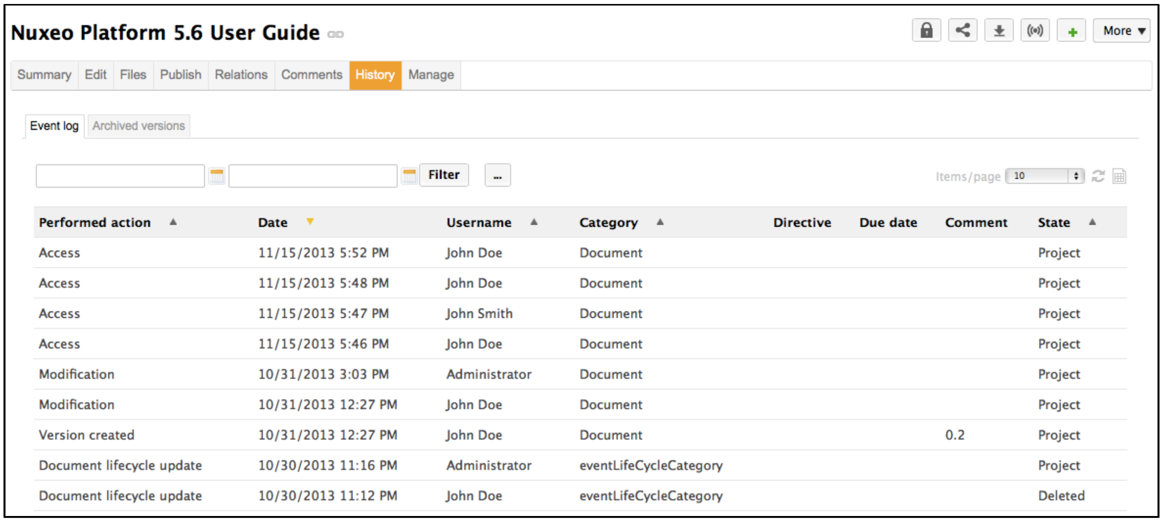
Related Documentation
• Digital signature dev documentation

Document access tracking

The Document access tracking package is used to register in the document's history the fact that users have accessed the document, and so have probably read it.

It adds actions done by the server. You do not have any action to do so the access to documents is logged.
Just like there is a new line in the event log every time the document is modified, there will be a line added when users click on the document to consult it.

In this **History** tab, when a user clicks on the document, a new event is registered, called "Access". It is indicated the user who opened the document and the date and time at which he/she accessed it.



Performed action	Date	Username	Category	Directive	Due date	Comment	State
Access	11/15/2013 5:52 PM	John Doe	Document				Project
Access	11/15/2013 5:48 PM	John Doe	Document				Project
Access	11/15/2013 5:47 PM	John Smith	Document				Project
Access	11/15/2013 5:46 PM	John Doe	Document				Project
Modification	10/31/2013 3:03 PM	Administrator	Document				Project
Modification	10/31/2013 12:27 PM	John Doe	Document				Project
Version created	10/31/2013 12:27 PM	John Doe	Document			0.2	Project
Document lifecycle update	10/30/2013 11:16 PM	Administrator	eventLifeCycleCategory				Project
Document lifecycle update	10/30/2013 11:12 PM	John Doe	eventLifeCycleCategory				Deleted

Related Documentation

- Document Access Tracking dev documentation

Nuxeo Agenda

The Nuxeo Agenda package provides users with a new documents type "Event" that enables them to manage their list of meetings and other events with a calendar view.

The Nuxeo Agenda is included in the Social Collaboration module. See the page Agenda Overview.

Related Documentation

- Nuxeo Agenda dev documentation

Nuxeo - BIRT Integration

The Nuxeo - BIRT Integration package leverages the reporting features of Eclipse BIRT, enabling users to create reports on the application's activity, directly from the Nuxeo Platform.

When the Nuxeo - BIRT Integration package is installed on the Nuxeo Platform, users can create and generate reports, defining what statistics they want to compute. To help them, the application's administrators create report models, that already set up some parameters. The report models are based on BIRT report files that have been imported in the Nuxeo Platform. All the parameters defined in the BIRT report file are extracted and administrators can edit them in the Nuxeo Platform using the edit form of the Report Model
Then, users can create reports in the Platform, based on this model. Reports are bound to the document context, allowing to automatically get and use information on the report (like where the report is in the application's tree, etc).

Before You Start / Prerequisites

The whole process to make reports available and use them takes places in two places:

- in BIRT designer, to prepare the models,
- in Nuxeo Platform, where administrators can create report models and users can create and generate reports.

As a consequence, you need to install and set up:

- the Nuxeo Platform (the Document Management module is required),
- BIRT designer (version 4.2),

- the Nuxeo - BIRT Integration package.

Nuxeo Platform

The Nuxeo - BIRT Integration package requires the Document Management module of the Nuxeo Platform.
The Nuxeo Platform must run with a background database (vs the embedded one). You can see and edit the database settings from the Admin Center.

BIRT Designer

Of course, the administrators who will prepare report models need to have the BIRT designer installed to be able to create BIRT report files and use them in the Nuxeo Platform to create the models. However, it doesn't need to be installed on the same computer as the Platform. The BIRT engine required to generate reports from the Nuxeo Platform is included in the Nuxeo - BIRT Integration package.

You also need the database driver for being able to let the BIRT Designer with your Nuxeo Platform database.

Nuxeo - BIRT Integration Package

The Nuxeo - BIRT Integration package is available from the Nuxeo Marketplace. See the Nuxeo - BIRT Integration administration documentation.

In this section

Related resources

Check out the Nuxeo – BIRT integration screencast to get an overview of the package's features.

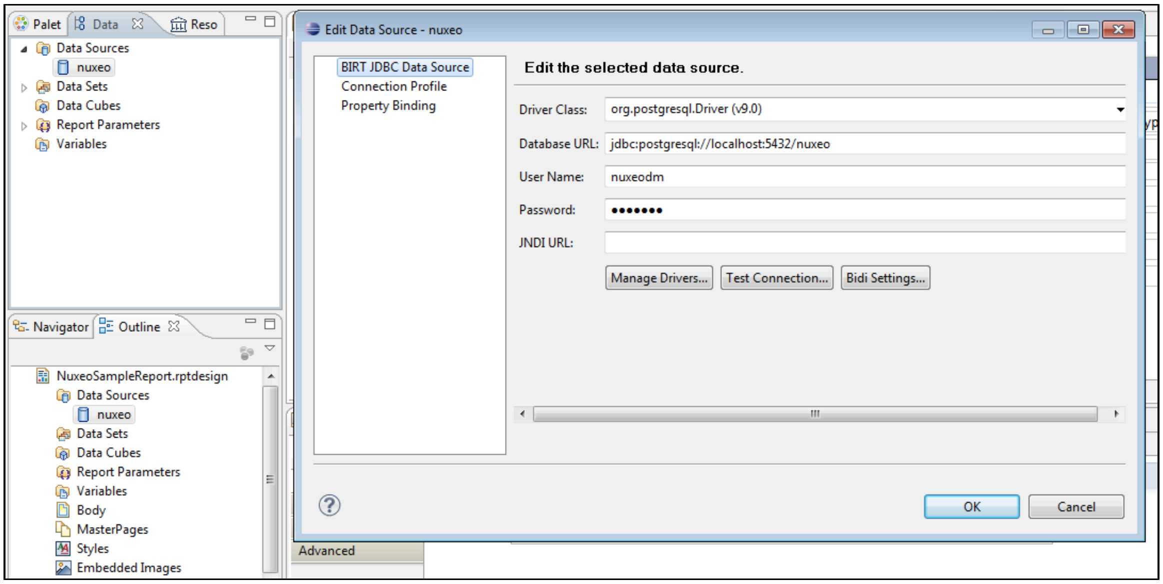
Working with BIRT Reports

This section is about what needs to be changed in the BIRT configuration to have report files that can be imported successfully in the Nuxeo Platform. For information about how to create reports in BIRT and its features, you can report to the tutorials, FAQ and examples from the Eclipse BIRT website.

Setting Up the BIRT Report Data Sources

To automatically use Nuxeo data sources, the data sources you define in your BIRT report should follow a name convention. You have two possibilities:

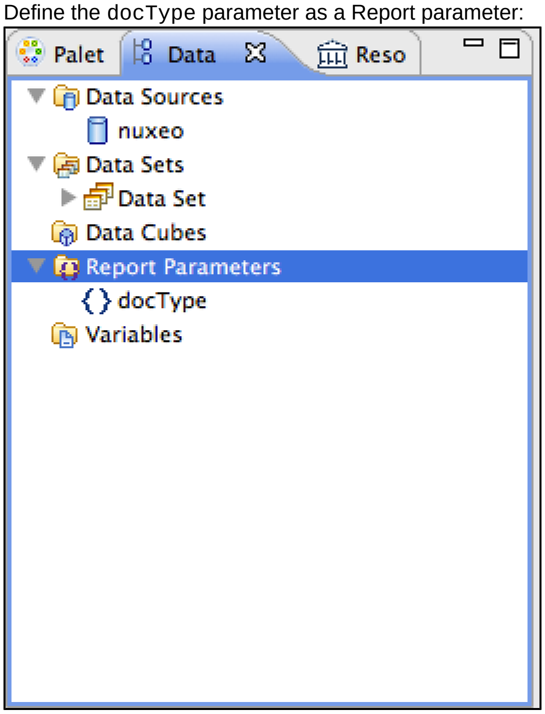
- `nuxeo`: in the Platform, the JDBC URL of the data source will be replaced by the one from the context document where you've created your BIRT Report document instance.
- `nuxeo-repositoryName`: in the Nuxeo Platform, the JDBC URL of the data source will be replaced by the JDBC URL of the data source related to the 'repositoryName'. This name convention is the one to be used in a multi-repository configuration.



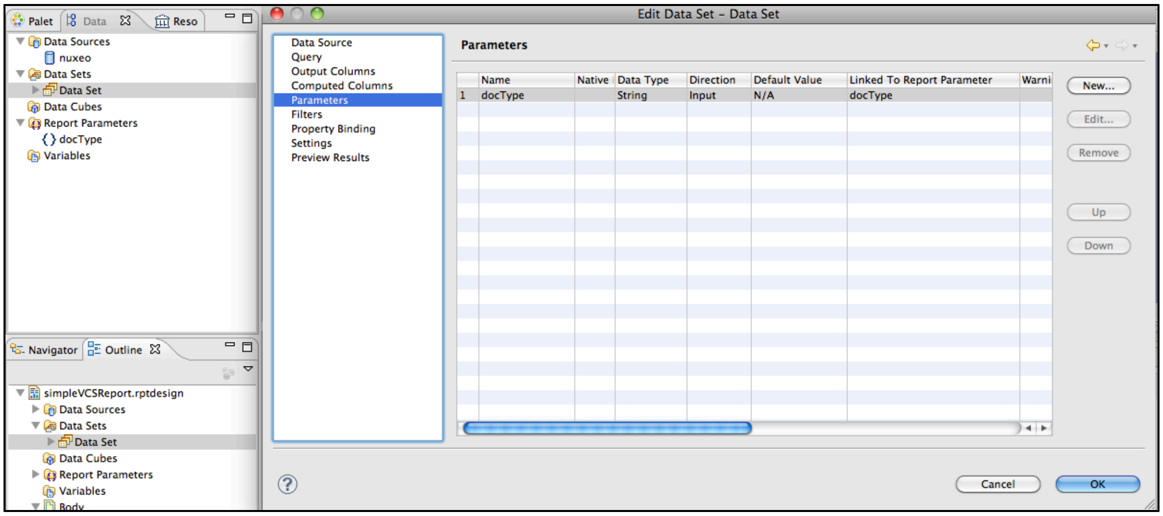
Creating a Report Parameter

To create a report parameter:

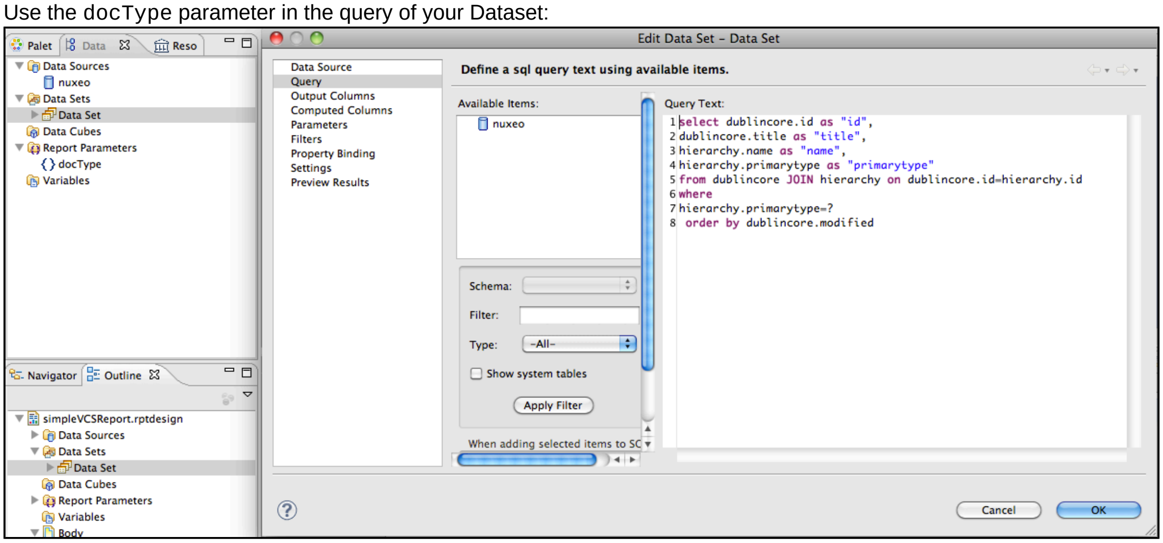
1. Define the docType parameter as a Report parameter:



2. Define the docType parameter as a parameter of your Dataset, link it to the report parameter:



3. Use the docType parameter in the query of your Dataset:



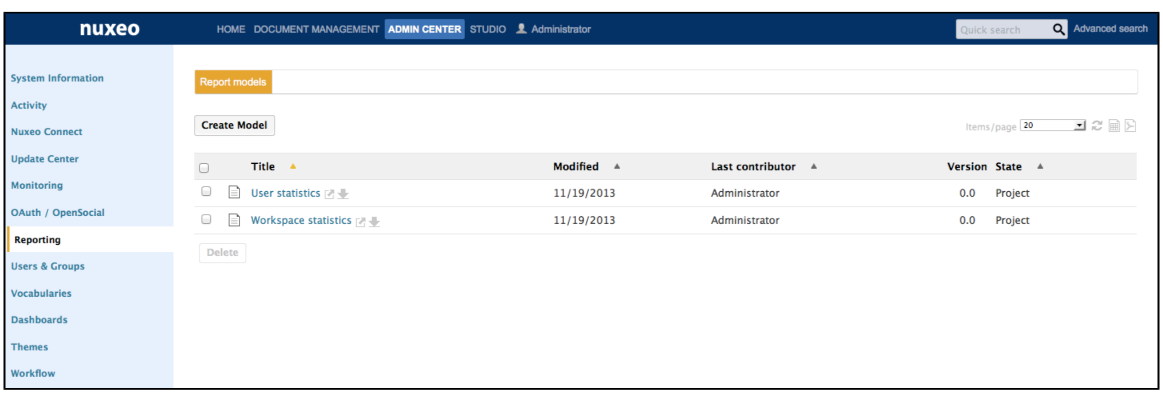
Sample BIRT Reports

You will find attached a set of sample reports to get you started: Sample Reports.zip.

Working with Reports Models and Reports

Report Models

Reports models can be created and edited by the Nuxeo Platform's administrators, from the Admin Center.



The actions available on a report model are:

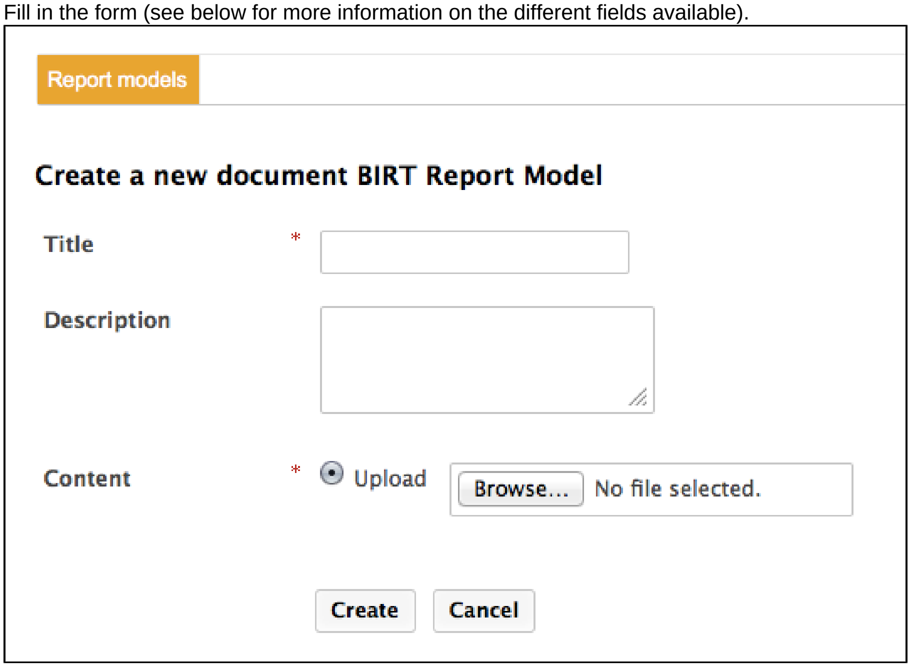
- edition,
- access rights management.

Creating a Report Model

Report models are managed (i.e. created, edited, deleted) from the Admin Center. As a consequence, only the administrators of the Nuxeo application can create new report models. After you installed the Nuxeo - BIRT Integration package, a new section is available in the Admin Center, called **Reporting**.

To create a report model:

1. Click on the **Create Model** button.
2. Fill in the form (see below for more information on the different fields available).



3. Click **Save**.
   The report is saved and its **Summary** tab is displayed.
   The report model is accessible only by administrators for now. You need to make it available to non-administrator users so that they can create reports based on it.

Field	Description
Title	Type a title for the report model. Note that if the BIRT file has a title in metadata, this title automatically overwrite your title.
Description	Optionally you can type a text explaining what the model is about.
Content	Select the BIRT report file (.rptdesign) to use for the model.

Editing a Report Model

When you edit a report model, you can change all the information you filled in on the creation form, but you can also set a parameter. If you set a parameter on the model, it will be set up by default on the report based on the model and users won't be available to change it. See the parameters section below.

Making a Report Model Available

By default, report models can be accessed by administrators only. So, they need to give access rights on the report models to non-administrator users. The access rights available on report models are the same as in workspaces.
The access rights on report models are managed the same way as on any other space. You can report to the Access rights management page for precise steps.

> On a default Nuxeo Platform configuration, members inherit **Read** right automatically on report models. So you don't need to specify access rights on the model: users with **Write** right will be able to create reports on the model.

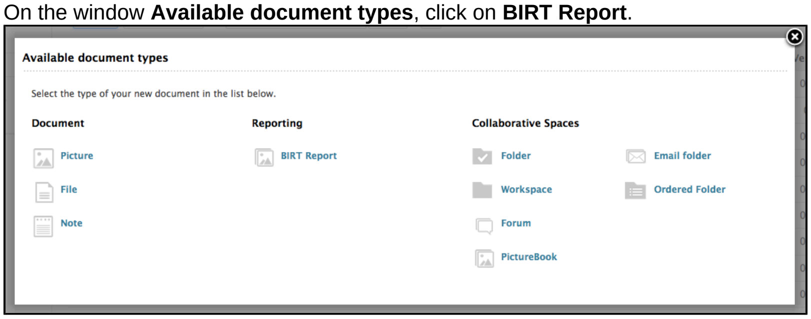
Reports

Reports are available in workspaces and folders. They can be created by users with **Write** right, who choose which model to use and have the possibility to define some parameters as frozen. Users with **Read** right can generate the report and see the updated computed results.

Creating a New Report

A BIRT report is created as any other document in the Nuxeo Platform.

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



3. Fill in the report's creation form.
4. Click on the **Create** button.
   The **Preview** tab of the report is displayed.
   You can now either:
   - generate the report from the **Preview** tab,
   - edit it to set up some parameters for users who will generate the reports,
   - manage the access to the report.

Report properties

Field	Description
Title	Give the report a title.
Description	Optional text indicating what the report is about.
Report Model	Model used by the report.
Report key	The report key is used to generate the report. By default, it is automatically generated by the system when you create the report, but you can edit it afterward.

Editing a Report

The steps to edit a report are the same as for a default document of the Document Management module. When you edit a report, you can modify its properties and you can set up some parameters. The parameters you set in the **Edit** tab are not displayed on the **Preview** tab anymore. Their value is set for all users for the report generation.

Managing Access to the Report

Unlike for notes and files (which are the most common default Nuxeo documents), users can manage the access to the BIRT reports. The report access rights are inherited from the workspace or folder it's created in. You can grant or deny access rights on the report just like on a workspace or a section.

Generating a Report

Generating a report means filling in the available parameters on the report's **Preview** tab with values meeting your criteria and getting the results. By default, the report is generated in HTML in the **Preview** tab of the report. However, you can also generate the report in PDF format from this URL: `http://localhost:8080/nuxeo/site/reports/REPORT_KEY/pdf` . The REPORT_KEY can be found in the **Summary** tab of the report.

Instead of the Report Key metadata, you can use the report ID. To know the ID of the report:

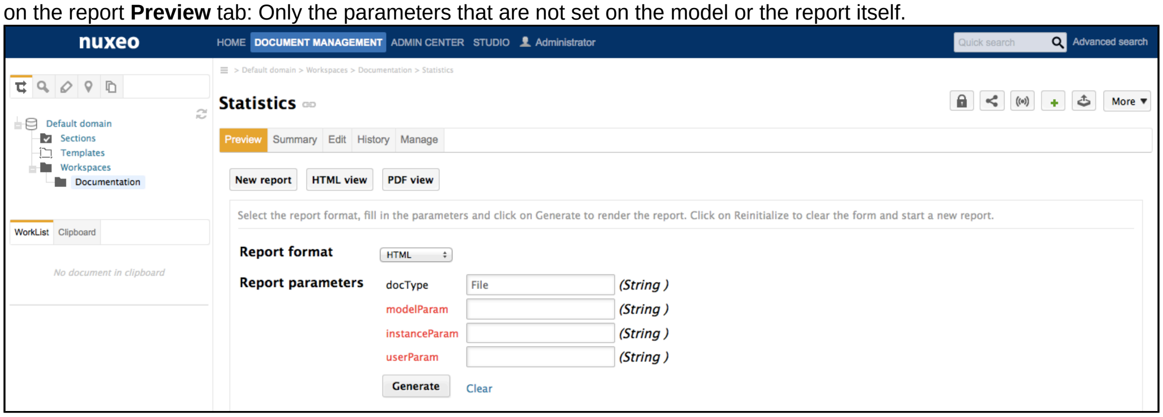
1. Click on the icon .
   A window pops up that displays the permalink to the report.
2. In the URL, copy the ID of the document, which is between `default/` and `/view_documents?`. In this example URL, the ID is in bold: "`http://localhost:8080/nuxeo/nxdoc/default/`**`e1f6d76f-405b-43d1-bb36-f7d8cd4068ba`**`/view_documents?tabId=&conversationId=0NXMAIN`".

If no parameter is left to be filled in by the user, the report is generated when you click on it to consult it.
For more information about the parameters, see the parameter section.

Parameters

Reports are generally based on parameters whose values can be set by users so as to computer the report. Parameters values can be defined at three places:

- on the report model Edit tab;
- on the report Edit tab: Only the parameters which are not set into the report model can be set here;
- on the report **Preview** tab: Only the parameters that are not set on the model or the report itself.



Reports are bound to the document context, which means that there is a set of parameters that will be automatically set from the document context if they are defined in the BIRT report. Those parameters will be filled by the Nuxeo instance when generating a report, and so you can use them when working on your BIRT report:

- `${userName}`: the username of the current user asking for the BIRT Report;
- `${docType}`: the document type of the BIRT Report (BirtReport);
- `${currentPath}`: the path of the BIRT Report document in the Nuxeo Platform;
- `${currentRepository}`: the repository name where the report is stored;
- `${currentSuperSpacePath}`: the path of the first parent of the report that is a super space (ie that has the superspace facet). By default, workspaces and domains are super spaces.
- `${currentSuperSpaceId}`:the ID of the first parent of the report that is a super space (ie that has the superspace facet). By default, workspaces and domains are super spaces.
- `${currentWorkspacePath}`: the path of the first parent workspace of the BIRT report;
- `${currentWorkspaceId}`: the ID of the workspace the report is in;
- `${currentDomainPath}`: the path of the first parent Domain of the report;
- `${currentDomainId}`: the ID of the domain the report is in.

Related Documentation
• Nuxeo - BIRT Integration dev documentation

Nuxeo CSV

The Nuxeo CSV addon enables users to proceed to a bulk import of documents in the Nuxeo Platform using a CSV file. This addons enables to create documents with their metadata filled in, to import files with their main attachment, to create a tree structure.

Installing this addon adds a button "Import a CSV file" for all users that have at least the Write right on any document in which it is possible to import a file. By default, this means workspaces and folders. If you configured other documents types in which it is possible to import files, then the button "Import a CSV file" can also be available (see the page Nuxeo CSV).

CSV file definition

The CSV file used to import documents in the Nuxeo Platform must respect the following rules:

- 1st line defines the properties that will be filled in,
- other lines define the documents to be imported,
- use a comma to separate properties,
- values must be between quotes,
- dates must use the format MM/dd/yyyy,

- for multi-valued metadata, such as contributors, use a pipe character (|) to separate the different values,
- for vocabularies values, use their id,
- lines defining the documents to import must define all properties specified on the 1st line, even empty ones (by using empty values).

Here is a simple example of the structure of a CSV file:

```
"name","type","dc:title","dc:description"
"my-file","File","My file","This is my file's description"
```

In the example above:

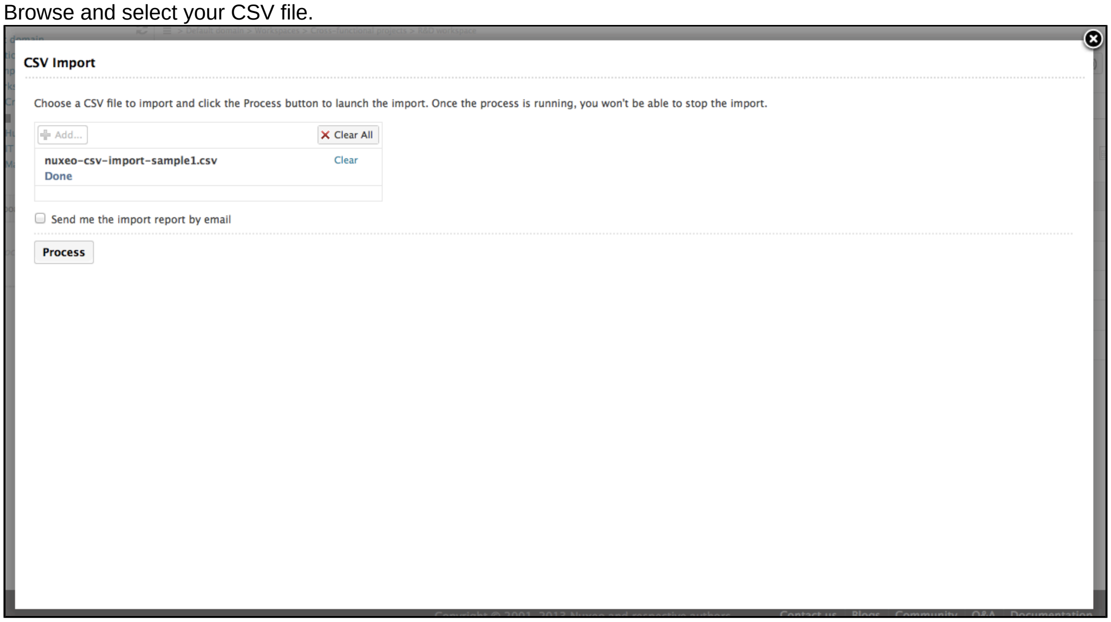
- `name` is the id of the document (used in the URL),
- `type` is the id of document type (see the page How to Override Existing Document Types for some default types properties),
- `dc:title` and `dc:description` are the title and description fields of the document from the Dublin Core (dc) schema. They follow the `schema:field` formatting.

Nuxeo CSV doesn't support complex properties, such as blob definition.

Using Nuxeo CSV

Importing documents using Nuxeo CSV always the same few steps. Some specific use cases are explained below.

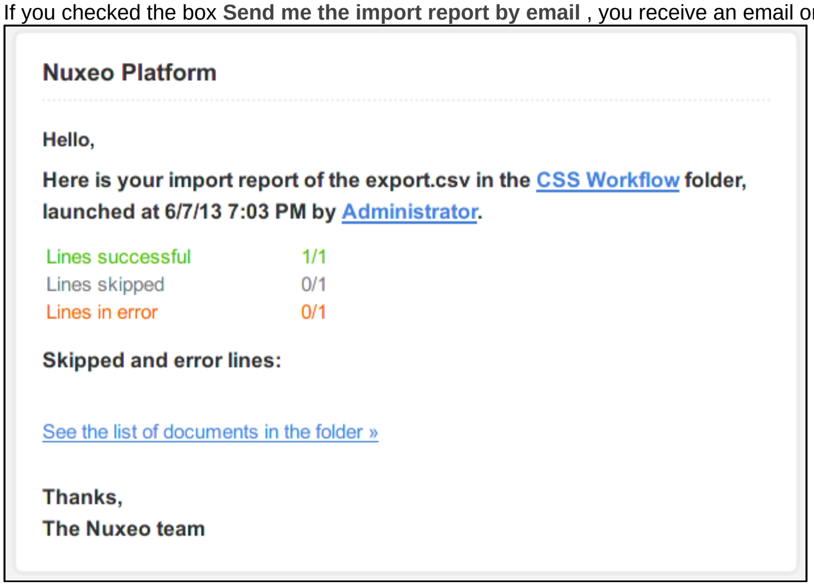
To import documents using Nuxeo CSV:

1. Prepare the CSV file that defines the documents to import, following the rules explained in the CSV file definition section.
   Some specific use cases are explained below.
2. In the Nuxeo Platform, go on the workspace or folder you want to import documents into.
3. Click on the **Import a CSV file** button in the workspace or folder you want to import documents into.
4. Browse and select your CSV file.
   

5. Optionally check the box **Send me the import report by email** if you want to receive an email when the import is done, that shows how the import went. This is useful in case of long import that will take some time.
6. Click on the **Process** button.
   The import starts. You can either:
   - wait for the import to be completed.
     You are then display a report of the import when it is completed;

- start a new import;
- browse the application.

If you checked the box **Send me the import report by email** , you receive an email once the import is completed.



Importing a document tree structure

It is possible to import a hierarchy of documents using Nuxeo CSV. To do that, the `name` property is used to determine where the document should be created in the hierarchy of documents you are importing: its `name` is composed of the names of its parents separated by /, forming a path.

Since the importer creates the documents in the order they are listed in the CSV file, you have to be careful about the order in which you declare the documents to import so as to be sure to create the workspace or folder before the documents it will hold.

Here is an example of a CSV import that creates documents at the root of the workspace from which the import is started and in a child folder:

```
"name","type","dc:title","dc:description"
"folder","Folder","Folder in the workspace","The description of the
folder created by CSV import"
"folder/doc-created-in-folder","File","Document created in a
folder","The description of a file imported in a folder created by the
import"
"doc1","File","Document 0","A document created directly in the workspace
in which the import is started"
"doc2","File","Doc 1","A file document description, created at the same
location as doc1"
"doc3","Note","Doc 2","A note document, created at the same location as
doc1 and doc2"
```

You can use the attached file nuxeo-csv-import-sample1.csv to test Nuxeo CSV to import a tree structure.

Importing files

It is possible to create documents of type File and to upload their main attachment using Nuxeo CSV. This requires that your administrator enabled it in the server configuration and to put the binary files in a folder that can be accessed by the server.

On your CSV file, use the `file:content` property in the 1st line and the name of your file on the document definition line.

```
"name","type","dc:title","dc:description","file:content"
"my-file","File","My file with uploaded attachment","This is a file with
its attachment, created using Nuxeo CSV","my-file.doc"
```

You can use the attached zip sample Nuxeo-CSV-sample.zip to test the import of files.

Setting life cycle state when creating documents

It is possible to set the life cycle state when the document is created through Nuxeo CSV, using the `ecm:currentLifeCycleState` propert y. This property is ignored when updating documents.

```
"name","type","dc:description","dc:title","ecm:currentLifeCycleState"
"myfile","File","a simple file","My File","obsolete"
```

In this section

Nuxeo DAM PDF Export

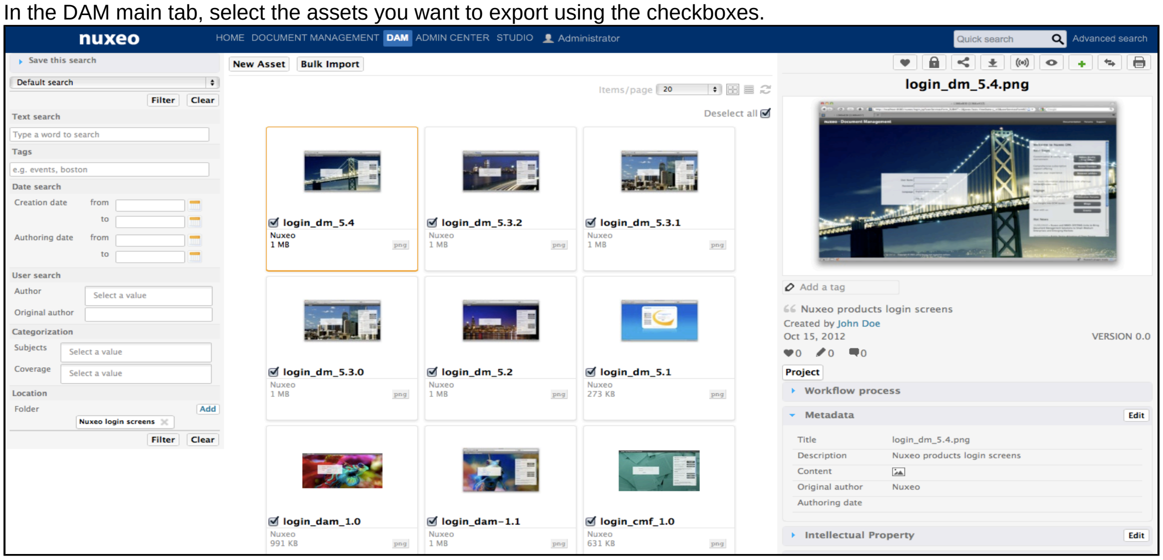
The Nuxeo DAM PDF Export package enables users to export a selection of pictures in a PDF document.

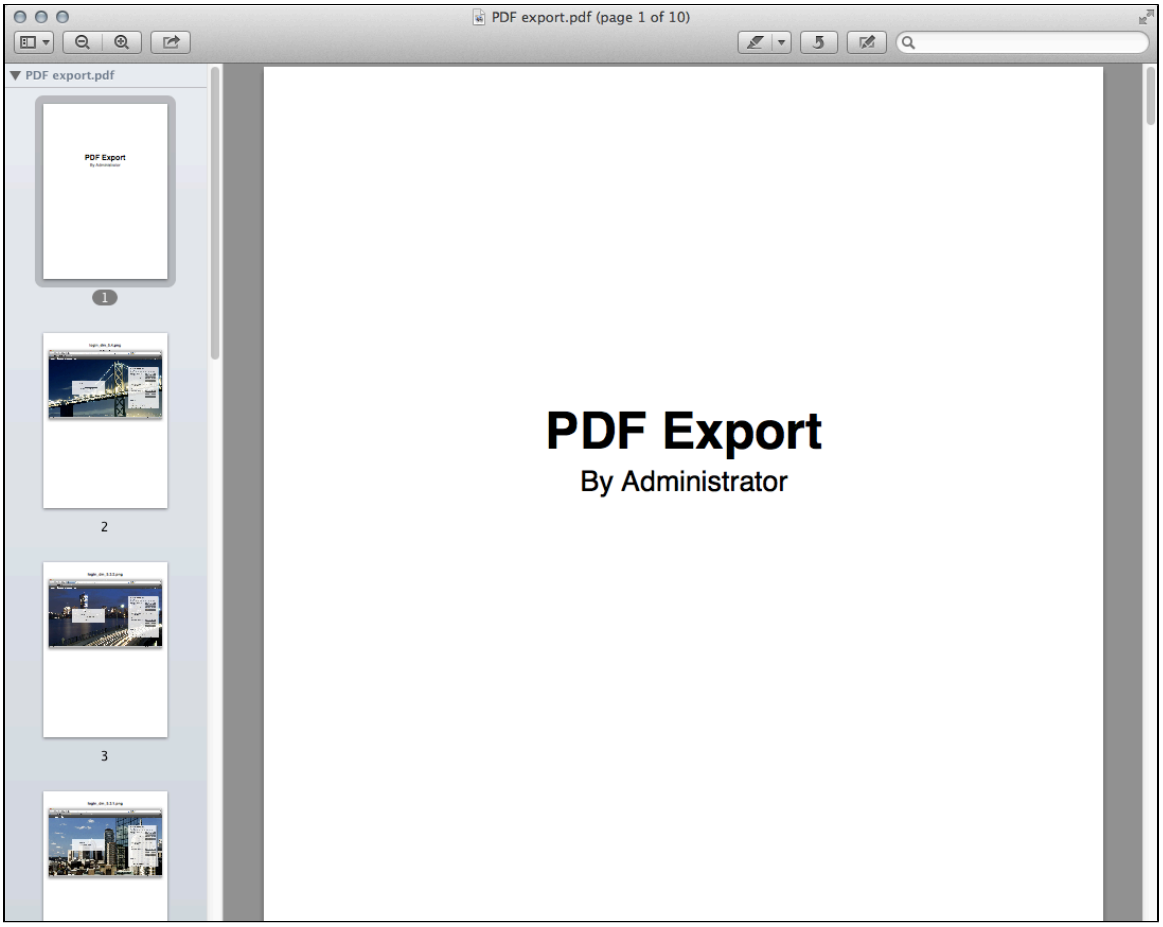
Only pictures are exported: if you select different types of assets, only the pictures will be in the PDF document.

What is exported:

- The OriginalJPEG format of the picture,
- The title of the document (not the file name),
- Who did the export.

To export a set of pictures:

1. In the DAM main tab, select the assets you want to export using the checkboxes.

   The **Export to PDF** button at the bottom of the documents list is available as soon as a picture is selected.
2. Click on the **Export to PDF** button.
   The PDF is generated. Depending on your OS, you can open it directly or save it.



Nuxeo Diff

Nuxeo Diff enables to compare two documents or two versions of a document to see the differences between documents or versions. When you compare two documents or versions of a document, the elements below are compared:

- the metadata (title, coverage, modification date, etc),
- the content (note or main attachment depending on the document involved),
- the attached files.

You can compare documents in any space of the Nuxeo Platform: workspaces, sections...

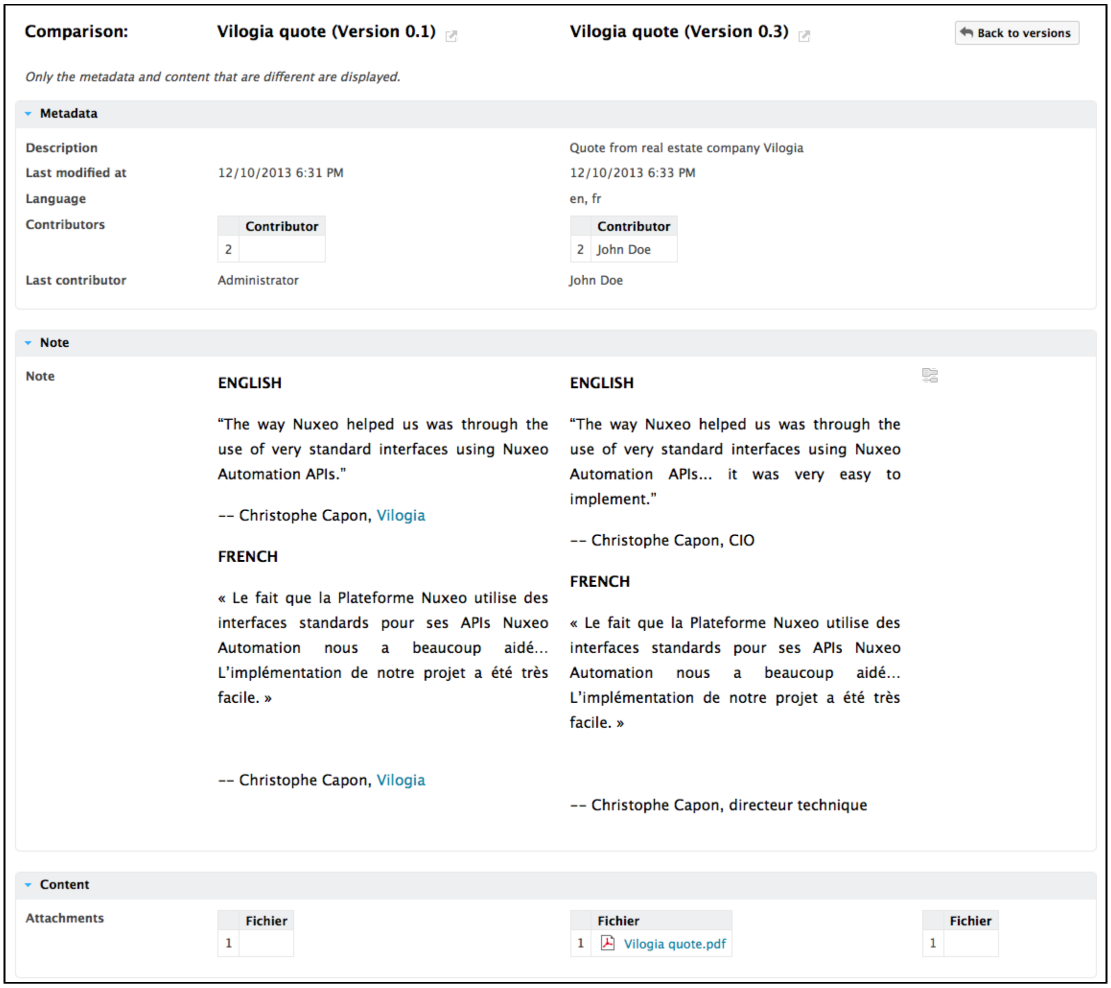
Since Nuxeo Platform 5.8, Nuxeo Diff is integrated in the Document Management module.

On this page

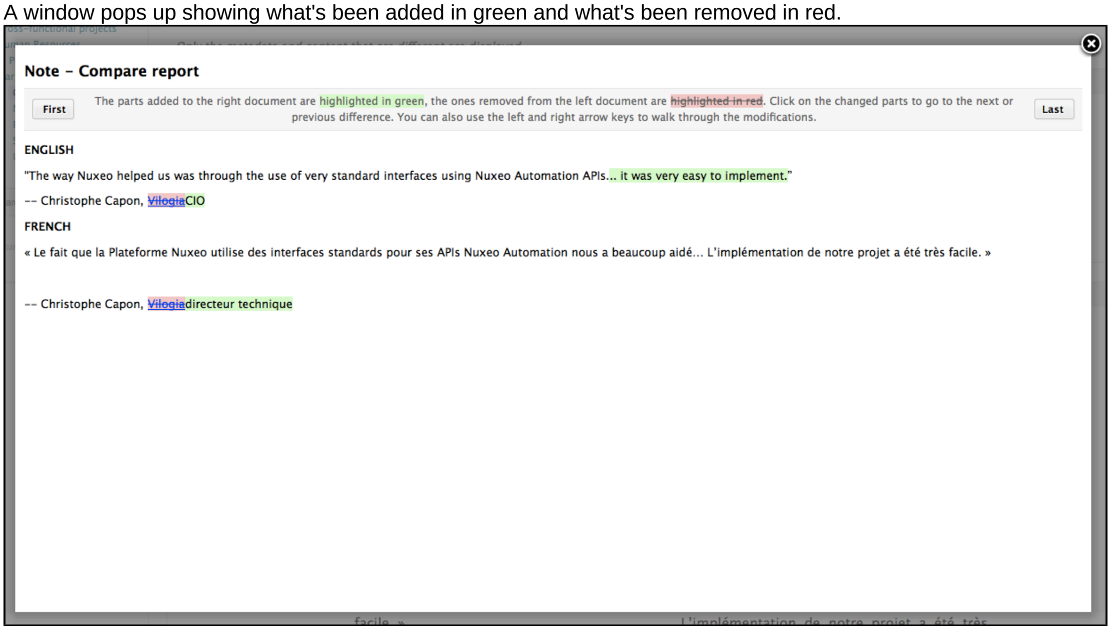
Comparing a document's versions

To compare two versions of a document:

1. On the document's **History** tab, click on the **Archived versions** sub-tab.
2. Select the two versions you want to compare by checking the corresponding boxes.
3. Click on the **Compare** button.
   The fields for which there has been changes between the two versions are displayed in a table, with the first version's values on the left and the second version's values on the right.



4. If you want to visualize the content changes, click on the icon on the right.
A window pops up showing what's been added in green and what's been removed in red.

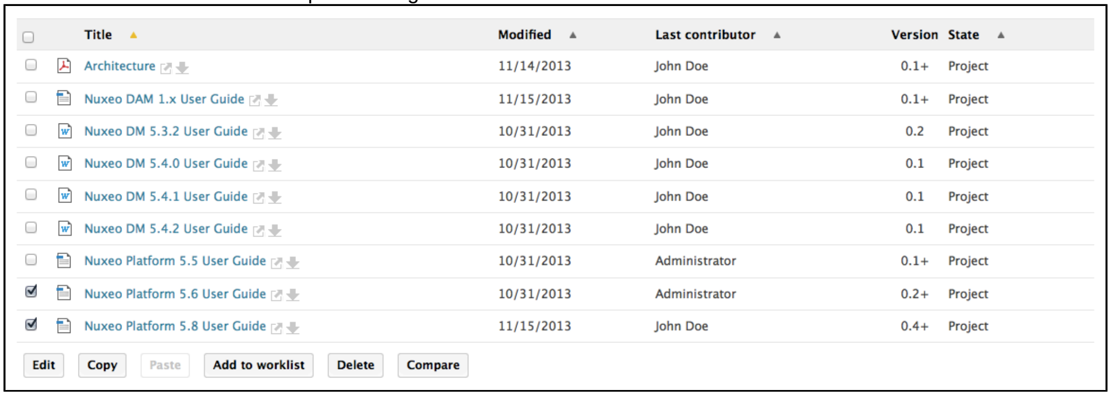


Comparing documents

It is also possible to compare two distinct documents.

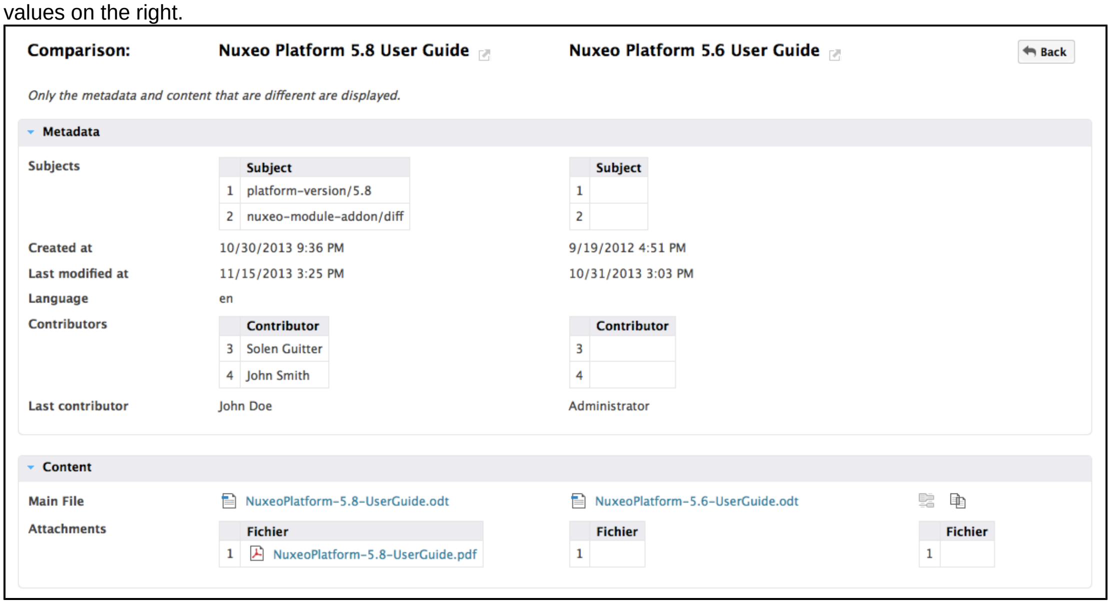
To compare two documents in the same workspace:

1. Select the documents to be compared using the checkboxes.



	Title	Modified	Last contributor	Version	State
☐	Architecture	11/14/2013	John Doe	0.1+	Project
☐	Nuxeo DAM 1.x User Guide	11/15/2013	John Doe	0.1+	Project
☐	Nuxeo DM 5.3.2 User Guide	10/31/2013	John Doe	0.2	Project
☐	Nuxeo DM 5.4.0 User Guide	10/31/2013	John Doe	0.1	Project
☐	Nuxeo DM 5.4.1 User Guide	10/31/2013	John Doe	0.1	Project
☐	Nuxeo DM 5.4.2 User Guide	10/31/2013	John Doe	0.1	Project
☐	Nuxeo Platform 5.5 User Guide	10/31/2013	Administrator	0.1+	Project
☑	Nuxeo Platform 5.6 User Guide	10/31/2013	Administrator	0.2+	Project
☑	Nuxeo Platform 5.8 User Guide	11/15/2013	John Doe	0.4+	Project

2. Click on the **Compare** button below the list of documents.
   The fields that have different contents are displayed in a table, with the first document's values on the left and the second document's values on the right.



3. If you want to visualize the content changes, click on the icon on the right.
   A window pops up showing what's been added in green and what's been removed in red.

To compare two documents in different workspaces:

1. Add the documents to compare to your worklist.
2. Click on the **Compare** link in the worklist.
   The fields that have different contents are displayed in a table, with the first document's values on the left and the second document's values on the right.
3. If you want to visualize the content changes, click on the **Detail** link on the right.
   A window pops up showing what's been added in green and what's been removed in red.

Related documentation

- Nuxeo Diff developer documentation

Nuxeo Drive

This page is about Nuxeo Drive 2. For versions 1.x see the page Nuxeo Drive 1.x.

Nuxeo Drive is a Nuxeo addon that enables the synchronization of folders or workspaces from the Nuxeo Platform with local folder on your computer.

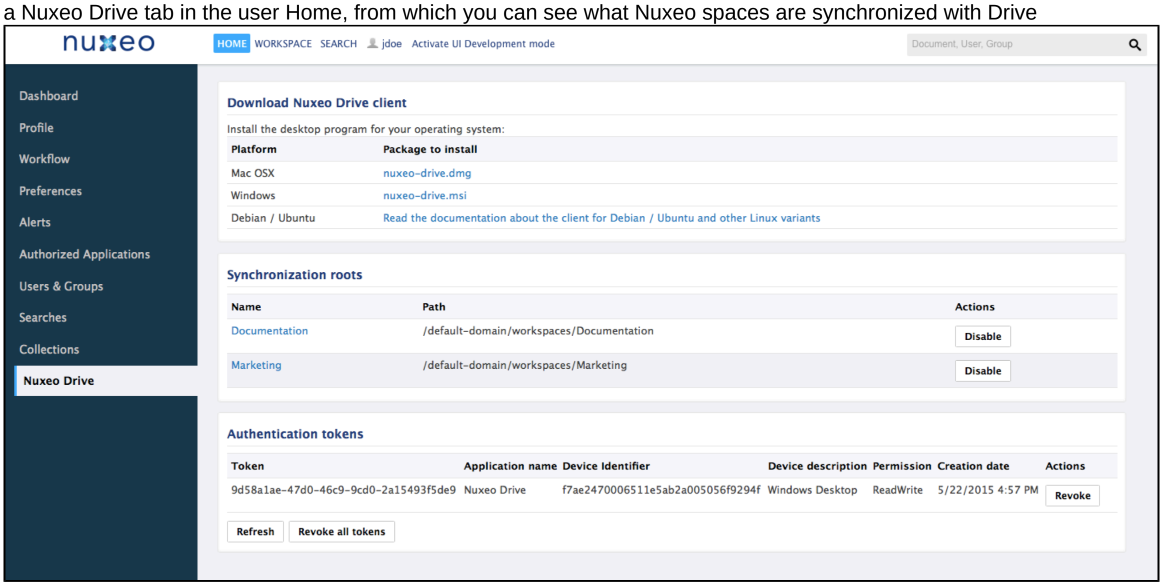
Here is the big picture of how Nuxeo Drive works: on the Nuxeo Platform web interface, you mark some workspaces or folders to synchronize. After you installed the Nuxeo Drive client on your computer and bound it to a Nuxeo server, documents are saved on your computer so you can access them and work on them offline. And the next time you have an Internet connection, changes in your local folder are uploaded to the Nuxeo Platform. Changes on the server are also automatically downloaded to your computer. Nuxeo Drive also enables to edit synchronized documents locally from your computer.

> Please note that the main purpose of Nuxeo Drive is to allow synchronization between a file system and some mount points of a Nuxeo repository. Nuxeo Drive is neither a bulk import tool, nor a repository backup / synchronization tool.

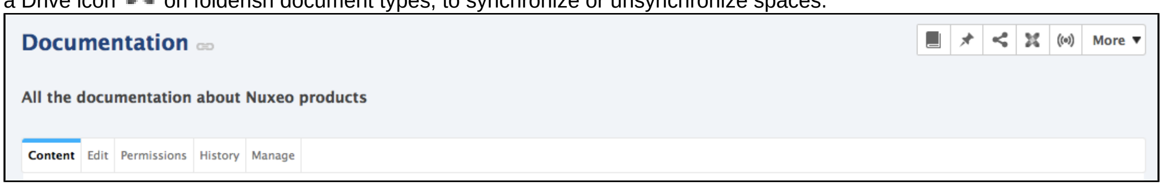
To enable Nuxeo Drive, you need to install Nuxeo Drive client on your computer so your computer can communicate with the Nuxeo Platform.

The Nuxeo Drive package adds the following elements to your Nuxeo Platform application:

- a Nuxeo Drive tab in the user Home, from which you can see what Nuxeo spaces are synchronized with Drive



- a Drive icon on folderish document types, to synchronize or unsynchronize spaces.



Installing Nuxeo Drive on Your Computer

> For the installation of the Nuxeo Drive package on the server, please see the Installation and Administration Guide.

To be able to synchronize folders on your computer, you need to install the Nuxeo Drive client on your computer. We provide OS-specific installer for Mac OS X and Windows, available from the Nuxeo Drive tab of the Home. A Linux installer will come shortly.

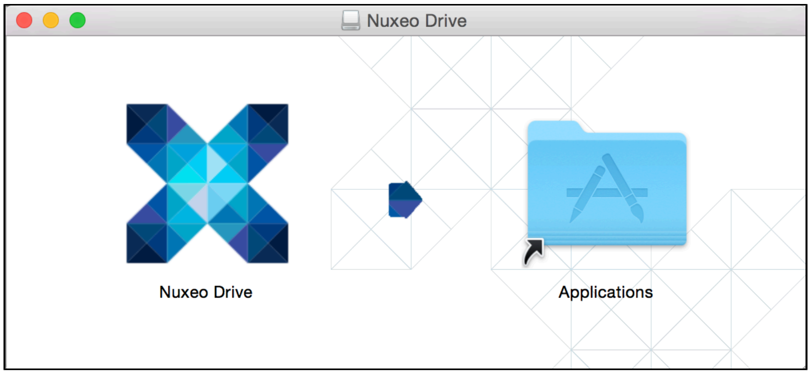
If you try to synchronize a folder and you haven't installed the Nuxeo Drive client yet or haven't provided your credentials to the Nuxeo Drive client, you are automatically directed to the Nuxeo Drive home tab to install it.

Installing Nuxeo Drive on Mac OS X

Nuxeo Drive is known to work on OS X starting from the version 10.8 (Mountain Lion).

To install Nuxeo Drive on your Mac OS X computer:

1. Download the installer (.dmg file) from the **Nuxeo Drive** tab in the **Home** or from the Nuxeo Drive update site.
2. Run the installer: drag and drop the Nuxeo Drive icon in the Applications directory.



Nuxeo Drive is now installed on your computer.

3. You now need to start Nuxeo Drive on your computer.
   A Nuxeo Drive folder will be created by the system at the root of your local home folder (`/Users/USER/`). This is the place where synchronized documents will be stored on your computer.

Installing Nuxeo Drive on Windows

Nuxeo Drive is known to work on Windows 7 and 8, 32b and 64b.

To install Nuxeo Drive on your Windows computer:

1. Download the Windows installer (.msi file) from the **Nuxeo Drive** tab in the **Home** or from the Nuxeo Drive update site.
2. Run the installer: indicate where Nuxeo Drive should be installed (typically `C:\Program Files (x86)`) and click **Next** until the installation process is done.
   Nuxeo Drive is now installed on your computer.

   > If you have any problem due to a previous installlation of Nuxeo Drive you can try using this Microsoft tool to uninstall it properly.

3. You now need to start Nuxeo Drive to use it.
   A new Nuxeo Drive folder will be created by the system in your local Documents folder (`C:\Users\USER\Documents\`). This is the place where synchronized documents will be stored on your computer.

Ubuntu/Debian (and Other Linux Variants)

The .deb package of the client is not yet available. In the mean time you can manually install the development version.

To Install Nuxeo Drive on your Linux computer:

1. Follow the instructions listed in the dedicated section of the GitHub README file.

   For now, the systray icon is not visible under Unity desktop. As a consequence, the configuration window only appears at the first launch.
2. If you want to change it, issue the following commands:

```
pkill ndrive
rm ~/.nuxeo-drive
ndrive &
```

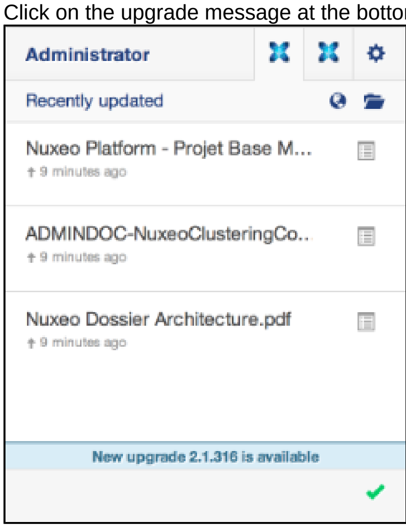
3. Now configure automatic start and protocol handler:

```
# See $XDG_CONFIG_DIRS for a system wide install (vs user-specific)
cat >~/.config/autostart/ndrive.desktop <<EOF
[Desktop Entry]
Type=Application
Exec=ndrive
Hidden=false
NoDisplay=false
X-GNOME-Autostart-enabled=true
Name[fr_FR]=Nuxeo Drive
Name=Nuxeo Drive
Comment[fr_FR]=
Comment=
EOF

/ndrive.desktop --create-dirs

# See $XDG_DATA_DIRS for a system wide install (vs user-specific)
cat >~/.local/share/applications/nxdrive-handler.desktop <<EOF
[Desktop Entry]
Type=Application
Exec=ndrive %u
Name=Nuxeo Drive Protocol Handler
GenericName=Nuxeo Drive Handler
Comment=Handle NXdrive URL
Terminal=false
MimeType=x-scheme-handler/nxdrive
EOF
update-desktop-database ~/.local/share/applications/
```

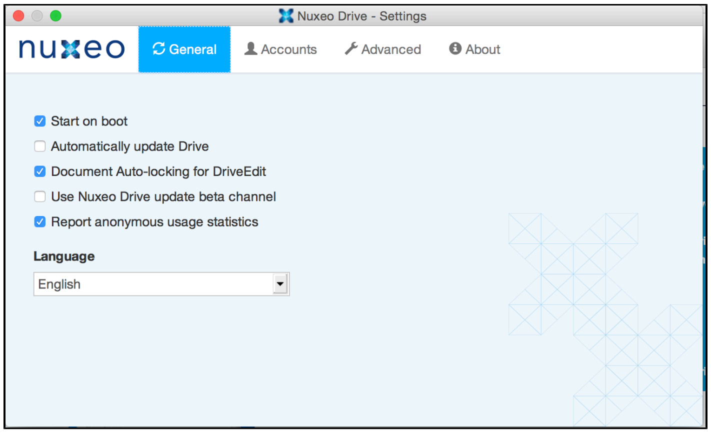
4. You now need to start Nuxeo Drive on your computer.
   A `Nuxeo Drive` folder will be created by the system at the root of your local home folder. This is the place where synchronized documents will be stored on your computer.

Upgrading Nuxeo Drive

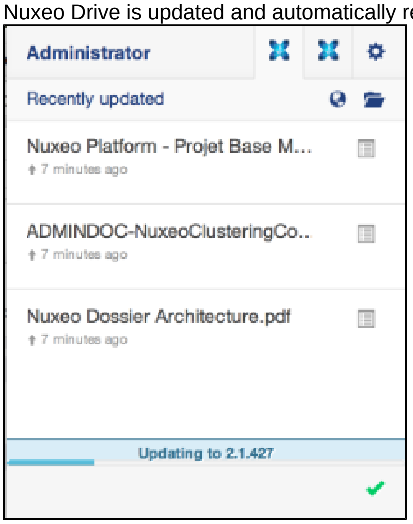
When a new version of Nuxeo Drive is available, a message is displayed at the bottom of the systray menu.

1. Click on the upgrade message at the bottom of the systray menu.
   

2. If you want Nuxeo Drive to update silently the next time, check the box **Automatically update Drive** in the **General** tab.



3. Click on the green icon.
   Nuxeo Drive is updated and automatically restarted.



> **Upgrading from Nuxeo Drive 1.3 to Nuxeo Drive 2**
>
> Upgrading from Nuxeo Drive 1.3 to Nuxeo Drive 2 is transparent: Click on the icon and the Update Nuxeo Drive item in the Nuxeo Drive menu to install the new version. After you confirmed the upgrade, Nuxeo Drive will download and restart and your synchronized folders will be automatically recovered.

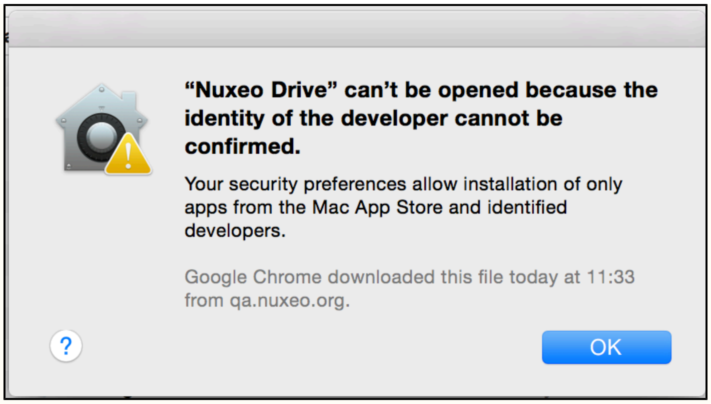
Starting Nuxeo Drive

After you installed Nuxeo Drive, you need to start it manually.

Start Nuxeo Drive like any other application:

- On Mac OS X, Nuxeo Drive is in the Applications directory.

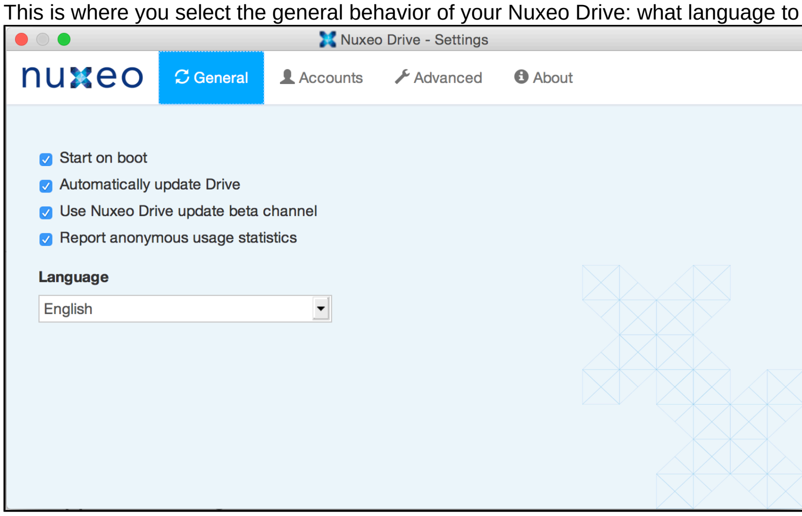
> When you double click on the icon, a security message appears. To bypass it, you can modify your security settings or click right on Nuxeo Drive application and click on **Open**.

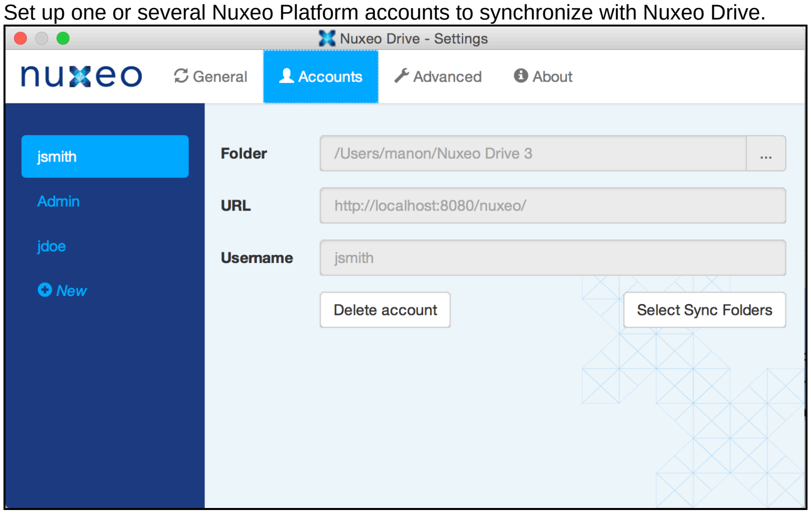


- On Windows, Nuxeo Drive is started from **Start** > **Programs** > **Nuxeo Drive**.
- On Linux, press Alt+F2 and enter `ndrive`.

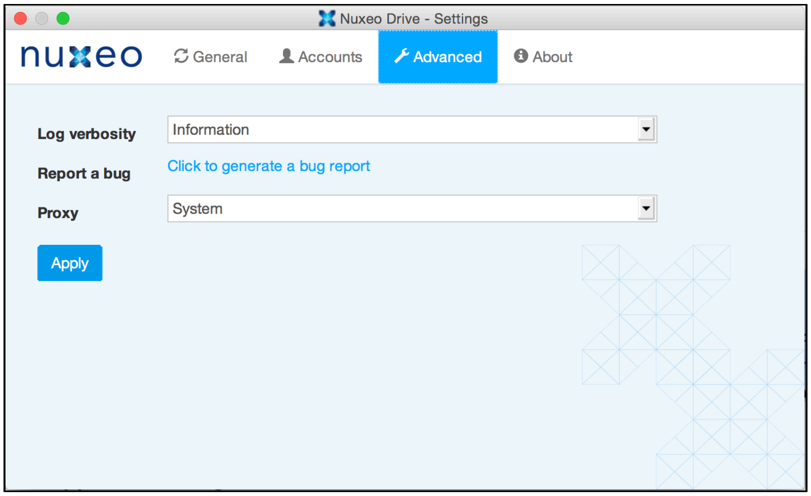
Configuring Nuxeo Drive

The Nuxeo Drive settings window shows four tabs that enable you to customize the behavior of your Nuxeo Drive:

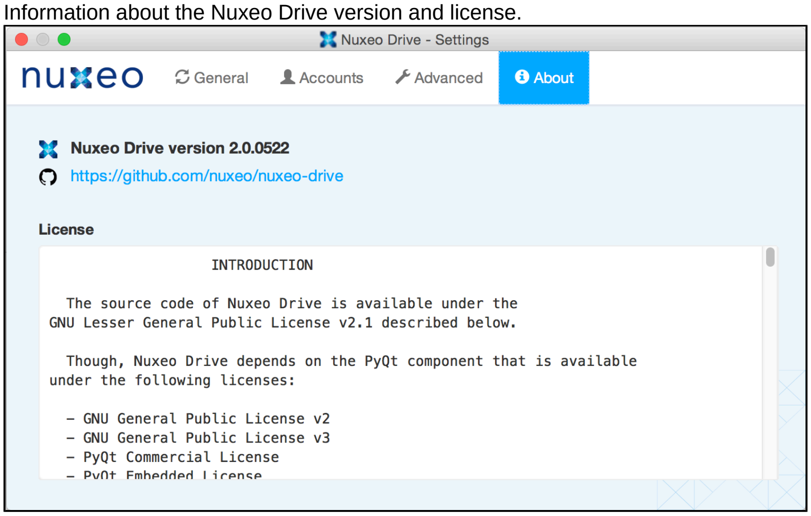
- **General**
  This is where you select the general behavior of your Nuxeo Drive: what language to use, the update policy, etc.
  

- **Accounts**
  Set up one or several Nuxeo Platform accounts to synchronize with Nuxeo Drive.
  

- **Advanced**
  Set up your proxy, change the log level and get a zipped bug report.



- **About**
  Information about the Nuxeo Drive version and license.



Accessing the Settings Window

Windows

1. Right-click on the the icon in the systray.
2. Click on the icon and on the **Settings** menu item.
   The Settings window is displayed.

Mac OS X / Linux

1. Click on the the icon in the systray.
2. Click on the icon and on the **Settings** menu item.
   The Settings window is displayed.

Managing Local Nuxeo Drive Accounts

You can use Nuxeo Drive to synchronize content from several Nuxeo Platform applications. This means that you can set up several accounts on Nuxeo Drive. Accounts are managed from the **Accounts** tab of the Settings window.

Adding a New Account

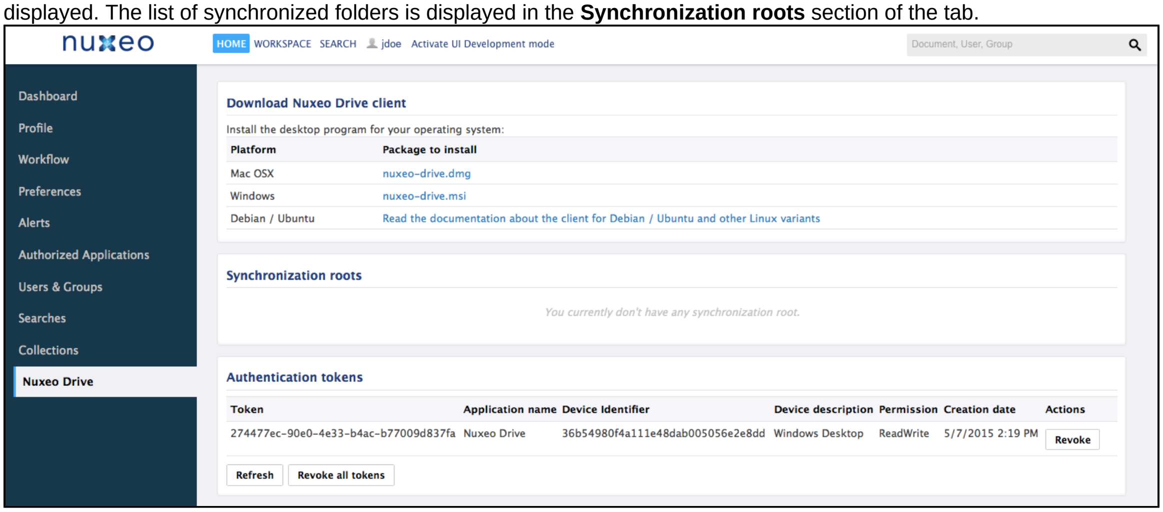
When you add a new account you need to provide the following information:

- **Name**: Give a name to the Nuxeo Drive account you are setting.
  This is helpful when you use Nuxeo Drive with several applications.
- **Folder**: Select where you want your Nuxeo Drive folder to be created.
- **URL**: Type the URL of your Nuxeo application, with the `/nuxeo` suffix (`http://www.mynuxeoapp.com/nuxeo` for instance).
- **Username**: Type your username to the Nuxeo Platform application.

- **Password**: Type your password to the Nuxeo Platform application.

The creation of a new account triggers the following actions:

- A Nuxeo Drive folder is created at the location you chose (see section Accessing the Nuxeo Drive Folder).
- Nuxeo Drive starts synchronizing the Nuxeo workspaces or folders you indicated as synchronized in the Nuxeo Platform. It will automatically update content when there is a modification on the server.
- In the **Nuxeo Drive** tab in your **Home**, an authentication token corresponding to the computer you are synchronizing from is displayed. The list of synchronized folders is displayed in the **Synchronization roots** section of the tab.



Deleting an Account

You can delete accounts from your Nuxeo Drive at any time by clicking on the **Delete account** button of the corresponding account, in the **Se ttings** window. The local Nuxeo Drive folder is not deleted.

Changing the Nuxeo Drive Language

By default, Nuxeo Drive is available in English and in French.

To change the language of Nuxeo Drive:

1. Open the Nuxeo Drive Settings window.
2. Click on the **General** tab.
3. In the **Language** drop down list, select the language you want to use.
   The Settings window language is immediately changed.

Synchronizing Content

Nuxeo Drive Synchronization Status

Here are the different statuses of Nuxeo Drive:

Icon	Status
	Synchronization is disabled (offline mode or suspended synchronization).
	Nuxeo Drive has successfully synchronized.
	Nuxeo Drive is synchronizing with the Nuxeo Platform.
	Your credentials are incorrect.

Accessing the Nuxeo Drive Folder

When you install Nuxeo Drive on your computer, it creates a "Nuxeo Drive" folder on your computer, from where you will be able to access the synchronized documents. This Nuxeo Drive folder is located:

- in `C:\Users\USER\Documents\` on Windows
- in `/Users/USER/` on Mac OS X
- in `/home/USER/` on Linux

Quick access to this folder is possible at any time using the Nuxeo Drive icon:

1. Right-click on the icon (in the top menu bar on Mac OS X, in the system tray on Windows).
2. Click on the icon .
   The Nuxeo Drive opens like any folder. You can now browse the Nuxeo synchronized folders from your desktop.

Marking Workspaces and Folders for Synchronization

Nuxeo Drive enables the synchronization of the document types below and their content:

- Workspace
- Folder
- Ordered folder

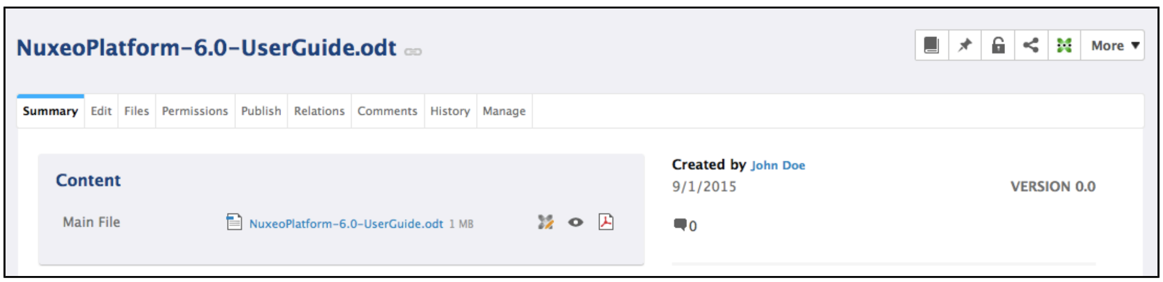
In the rest of this documentation, we'll call them all "folder".

Synchronizing a Folder

Starting from Nuxeo Platform 6.0, you can synchronize spaces on which you have at least Read permissions. For older versions of the Nuxeo Platform, you need at least Edit permissions to be able to synchronize a space.

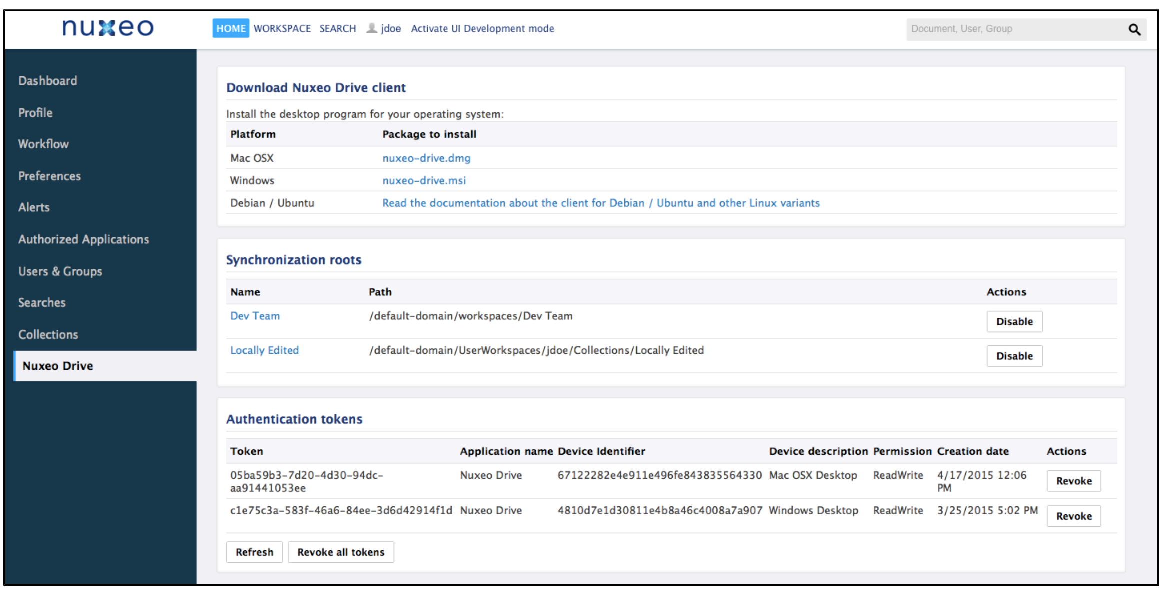
To synchronize a space, in the Nuxeo Platform, click on the icon .

The icon becomes green. Documents inside the synchronized space have an icon and a Drive local edit icon .



The folder and all its content is now available in your local Nuxeo Drive folder. You can now create, edit, delete documents from your computer. If you only have Read permissions, documents are in read-only mode.

On your Home Nuxeo Drive tab, the space is displayed in the "Synchronization root" section. This is where you can see all the spaces you have synchronized with Nuxeo Drive.



Suspending Synchronization

If a synchronized folder holds big document or a large amount of documents, synchronization can take some time and some computer resources. It is then possible to prevent this by suspending synchronization until a more convenient time.

To suspend synchronization:

1. Click on the Drive icon in the system tray.
2. Click on the icon and click on the **Suspend** menu item.
   If Nuxeo Drive is currently synchronizing, synchronization is completed before suspending Nuxeo Drive.
   The Drive icon becomes grey as long as synchronization is suspended: .

To resume synchronization:

1. Click on the Drive icon in the system tray.
2. Click on the icon and click on the **Resume** menu item.
   The Drive icon becomes blue again and synchronization is available again.

Unsynchronizing a Folder

There are to ways to desynchronize a folder.

- From the server, when you desynchronize a folder all its content is desynchronized from all the devices where you use Drive.
- From the client, when you desynchronize a folder you can do it in detail and choose to locally deactivate synchronization of different folders for the current device.

Deactivating Synchronization Locally (Client)

By default, once you have synchronized a folder all its content (files and folders) are synchronized. But you can deactivate synchronization locally on some folders. This feature enables you to manage the storage space dedicated to the synchronization, which is especially useful if you use a device with a low-storage capacity.

Clicking on the **Select sync folders** button in the Settings window shows the **Nuxeo Drive Filters** windows from which you can unselect folders to unsynchronize. Unselected folders remain displayed to you can easily reselect and synchronize them back. They are still marked as synchronized on your web UI.

Unsynchronizing Folders (Server)

Unsynchronizing a folder is only possible from the Nuxeo Platform web interface. You can only unsynchronize the whole synchronized space, i.e. from the synchronization root : it is not possible to unsynchronize a child . Clicking on the icon brings you back on the space from which the synchronization is done.

To unsynchronize a space, in the Nuxeo Platform interface, click on the icon .
The icon becomes gray, indicating that the space is no longer synchronized. The folder and its content is no longer available from your Nuxeo Drive folder and from the Home **Nuxeo Drive** tab.

Creating Documents

From the Platform

When you create a new document in a Drive-synchronized folder from the Platform, it is automatically created in your Drive folder at the next synchronization. If you created a file or a picture, what is in the Drive folder is the attachment (mydoc.doc for instance for Nuxeo document whose title could be "My document").

From the Local Nuxeo Drive Folder

Adding a new document in a Drive-synchronized folder from your computer will create the document in the Platform workspace at the next synchronization. The document title is the name of the original file, and no metadata is filled in.

Here are some examples of most commonly used item types and their output in Nuxeo:

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

Editing Documents

Versioning

When you edit a document, either from your Nuxeo Drive folder or using the online editing, a new version is automatically created on the Platform and the version number is updated:

- If you are not the last contributor of the document
- Or if your last edit is more than an hour ago

Then, if your document's version was 1.0 before modification for instance, it automatically becomes 1.1+ after you edited it from the Nuxeo Drive folder and the 1.1 is archived as it is created. Otherwise, a simple modification is done on the document and logged in the document's History.

See the page How to Customize Nuxeo Drive Versioning Policy to change this behavior.

Editing a Locked Document

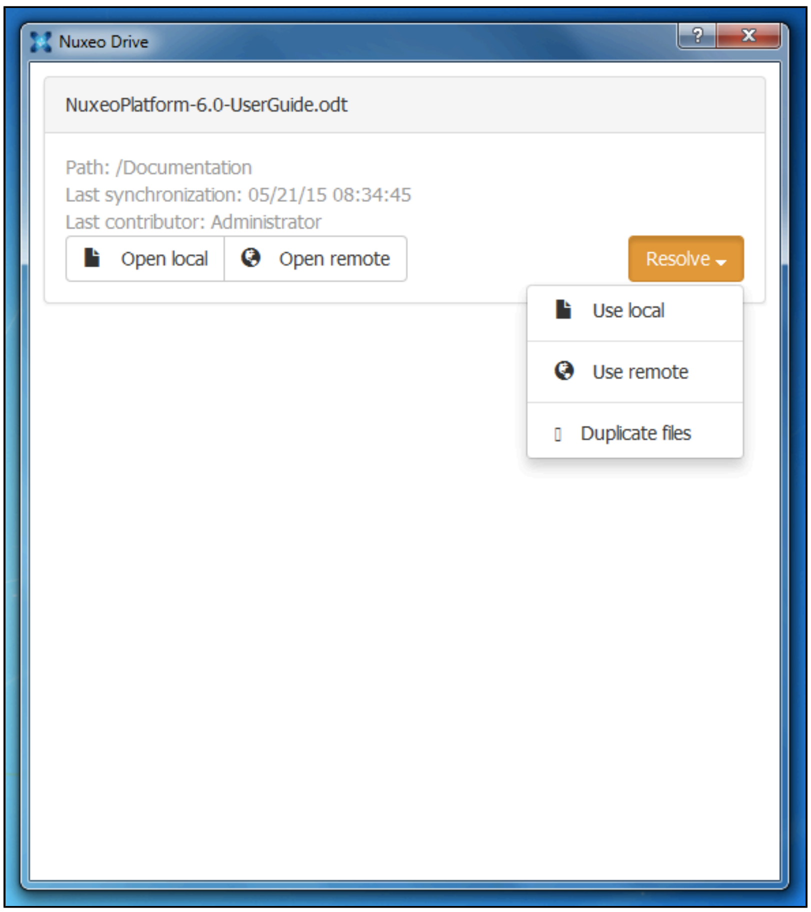
In the Nuxeo Drive folder, no indication is available if a document has been locked from the Nuxeo Platform interface. Nuxeo Drive won't prevent you from working on a document, but it will not update the locked document on the server if you are not the locker.

Managing Conflicts

It can happen that a document is edited by several users locally at more or less the same time. Or that a user edits a document locally in offline mode, and that the same document is modified during that offline period. When Nuxeo Drive tries to synchronize the document it detects that there may be a conflict between the different modifications of the document.

Clicking on the conflict message shows you the details and how to resolve the conflicts.

- **Use local**: The document in your Nuxeo Drive folder overrides the document on the server.
- **Use remote**: The document on the server is downloaded in your Nuxeo Drive folder and overrides your local version.
- **Duplicate files**: A new document is automatically created for the offline edited document. Its title is suffixed with __1: "my document__1.odt" for instance. Two documents are now available in the Nuxeo Platform and in the local Nuxeo Drive folder.



Online Editing with Direct Edit

Direct Edit enables you to edit any of your document's content from their Summary tab even if they are not synchronized. To be able to use correctly Direct Edit you need the Drive addon on your server and you must turn on Drive on your computer. This saves you the fastidious steps of opening your document, modify it and reimport it on your platform.

To edit a document locally from the web interface:

1. On the document in the Nuxeo Platform, click on the icon on the **Summary** tab.
   The document opens in its native application (OpenOffice.org for an .odt file for instance).

   > If you plan to work on the document for some time, you can easily lock it from the Metadata edit popup (see the section Metadata Edit).
   >
   > Note that depending on your OS and the file format, the document can be automatically locked.This is still a beta feature of Direct Edit, known to currently work on OS X and Windows.

2. Edit the document and save the modifications.
   Modifications are saved in the Nuxeo Platform directly.
3. Close the document.

Direct Edit Limitations

- Prior to Nuxeo Platform 6.0, online editing is available only in synchronized folders.
- Under Windows, nothing happens if you click on the icon without having Drive installed and running on your computer.

Renaming Documents

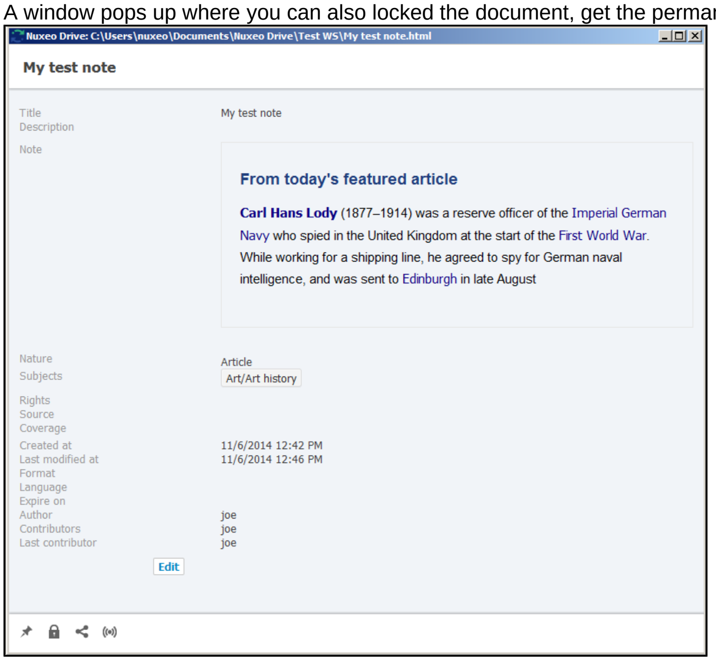
Renaming a document from the server, i.e. changing the document's title, has no impact on the file's name in your Nuxeo Drive folder, which is the document's attachment.

Renaming a document from the Nuxeo Drive folder renames the document and its attachment on the server if they have the same name. If the document title is different from the attachment's, then only the attachment is renamed.

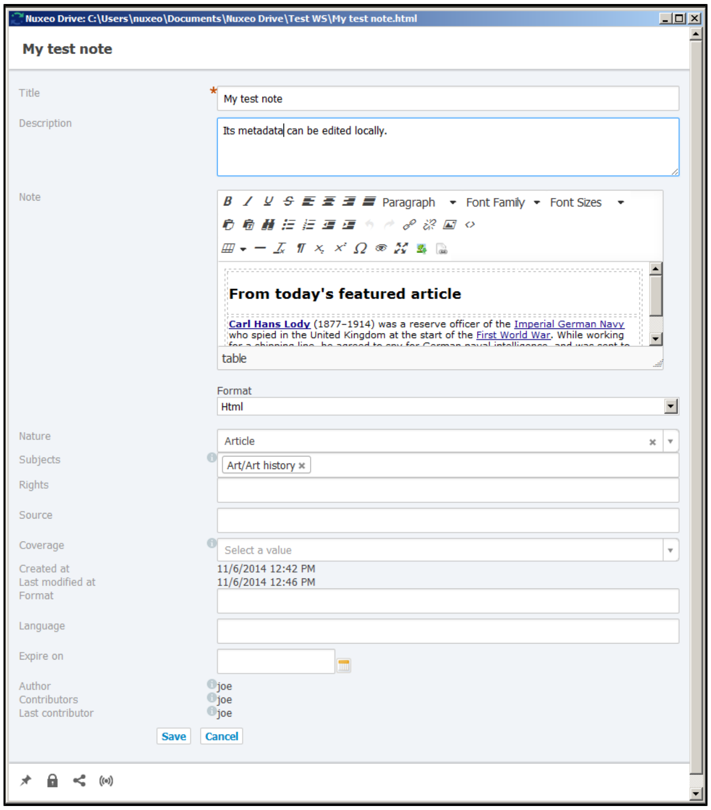
Editing Metadata

> Metadata edit is available starting from Nuxeo Platform 6.0.

Metadata Edit allows you to edit the metadata of your document from your desktop.

1. Go to your Nuxeo Drive folder on your computer.
2. Right-click on the name of the document that you want to edit.
3. Click on Nuxeo Drive.
   A window pops up where you can also locked the document, get the permanent link or add your document to your favorites.
   

4. Click on **Edit** and modify your document,



5. Click on **Save.**

Moving Documents

You can move documents either from your local Nuxeo Drive folder or from the Platform. When you move documents between two synchronized spaces, the move is done on the other side, whether you move documents from the Platform or from your Drive folder.

When you move a document from a Drive-synchronized folder to an unsynchronized one, the behavior is different if you move the document from the Platform or from your local folder.

- If you move the document from the Platform, the document is not available anymore in your local folder.
- If you move the document from your local folder, the document is deleted on the Platform and moved into the folder's trash. In the document's history, the deletion is tagged with the Nuxeo Drive category.

Deleting Documents

When you delete documents from the Platform, they are deleted from your local Drive folder at the next update.

When you delete a document from your local Drive folder, the document is deleted on the Platform and moved into the folder's trash. In the document's history, the deletion is tagged with the Nuxeo Drive category.

Unauthorizing a Drive Client to Access the Nuxeo Platform

When you start Nuxeo Drive on your computer for the first time, you need to provide your credentials so the Drive client can communicate with the Nuxeo Platform. This creates an authentication token on the Platform, that is displayed on the **Nuxeo Drive** tab in the **Home**. If you want to unauthorize a Drive client to access the Nuxeo Platform using your credentials, for instance because you changed your computer, you can revoke this authentication token. The Nuxeo Drive client will then require the credentials to be updated to connect to the Nuxeo Platform.

To revoke an authentication token:

1. On the Nuxeo Platform, in the **Home** tab, click on the **Nuxeo Drive** tab.
2. Click on the **Revoke** button of the token to be revoked. Several elements are displayed to help you identify the right token:
    - the device description: whether it is a Mac OS client, Windows client, Linux client;
    - the creation time: date and time at which the token was created, i.e. the date and time at which you provided it with your credentials.
3. In the window that pops up, click on **OK** to confirm.
   The Nuxeo Drive client cannot communicate with the Nuxeo Platform and switches to offline. When you click on the Drive icon, it says "Update credentials (required)".

Uninstalling Nuxeo Drive

To uninstall Nuxeo Drive from your computer, you need to remove the following items:

- The .nuxeo-drive hidden folder where logs are stored
- The Nuxeo Drive client application
- The Nuxeo Drive local folder, **only if you want to get rid of all the synchronized files and folders**.

Uninstalling Nuxeo Drive on Mac OS X

To uninstall Nuxeo Drive:

1. Quit Nuxeo Drive:
    a. Click on the icon in the system tray.
    b. Click on **Quit** in the menu.
2. Open a terminal and execute the following command:

```
rm -rf ~/.nuxeo-drive
```

3. Remove Nuxeo Drive from your applications like you usually remove any application.
4. Delete the Nuxeo Drive item from your Favorites in the Finder.

At this point you have uninstalled the Nuxeo Drive program and its configuration. If you want to get rid of the synchronized data you also need to delete the Nuxeo Drive folder like you delete any regular folder.

Uninstalling Nuxeo Drive on Windows

To uninstall Nuxeo Drive:

1. Quit Nuxeo Drive:
    a. Click on the icon in the system tray.
    b. Click on **Quit** in the menu.

    At this point you can check that there are no `ndrivew.exe` or `ndrive.exe` remaining processes in the **Processes** tab of the **Windows Task Manager** that you can open by typing Ctrl + Shift + Esc.

    If you find such processes, kill them manually by right-clicking on their name and clicking on **End Process**.
2. Uninstall the Nuxeo Drive application like a regular program using the Control Panel.

    If you have any problem during the uninstallation process you can try using this Microsoft tool to uninstall Nuxeo Drive properly.
3. Waiting for NXDRIVE-476 to be resolved you also need to manually delete the empty `C:\Program Files (x86)\Nuxeo` directory.

At this point you have uninstalled the Nuxeo Drive program and its configuration. If you want to get rid of the synchronized data you also need to delete the Nuxeo Drive folder like you delete any regular Windows folder.

Uninstalling Nuxeo Drive on Linux

To uninstall Nuxeo Drive:

1. Quit Nuxeo Drive:
    - Click on the icon in the system tray.
    - Click on **Quit** in the menu.
2. Open a terminal and execute the following command:

```
rm -rf ~/.nuxeo-drive
```

3. Uninstall the Nuxeo Drive application using the following command:

```
sudo pip uninstall nuxeo-drive
```

At this point you have uninstalled the Nuxeo Drive program and its configuration. If you want to get rid of the synchronized data you also need to delete the Nuxeo Drive folder like you delete any regular Linux folder.

In this section

Related Documentation

- Nuxeo Drive developer documentation
- How to Manually Initialize or Deploy a Nuxeo Drive Instance

Nuxeo Drive 1.x

This documentation is about Nuxeo Drive 1.x. For the latest version of Nuxeo Drive, please read the page Nuxeo Drive.

Nuxeo Drive is a Nuxeo addon that enables the synchronization of folders or workspaces from the Nuxeo Platform with local folder on your computer.

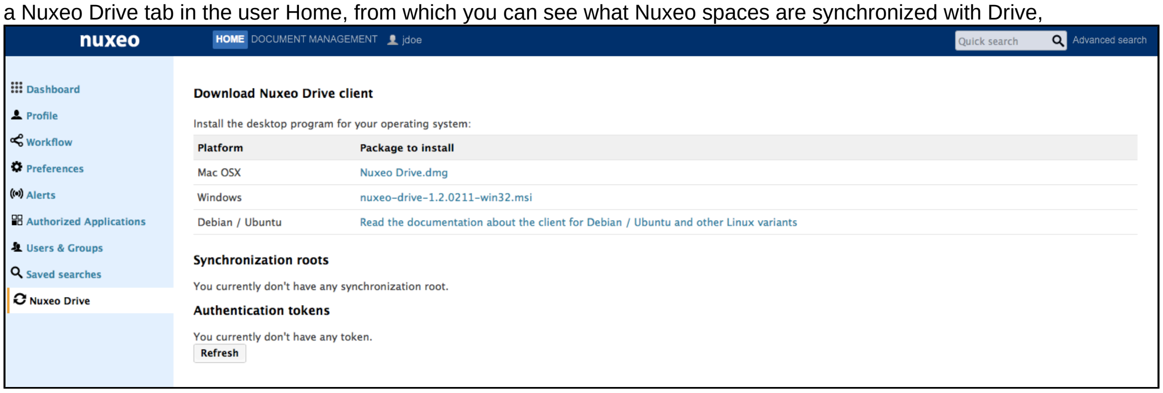
Here is the big picture of how Nuxeo Drive works: on the Nuxeo Platform web interface, you mark some workspaces or folders to synchronize. After you installed the Nuxeo Drive client on your computer and bound it to a Nuxeo server, documents are saved on your computer so you can access them and work on them offline. And the next time you have an Internet connection, changes in your local folder are uploaded to the Nuxeo Platform. Changes on the server are also automatically downloaded to your computer. Nuxeo Drive also enables to edit synchronized documents locally from your computer.

Please note that the main purpose of Nuxeo Drive is to allow synchronization between a file system and some mount points of a Nuxeo repository. Nuxeo Drive is neither a bulk import tool, nor a repository backup / synchronization tool.

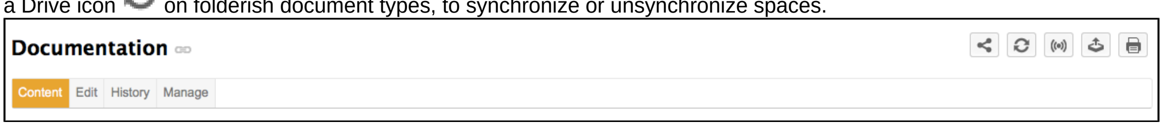
To enable Nuxeo Drive, you need to install Nuxeo Drive client on your computer so your computer can communicate with the Nuxeo Platform.

The Nuxeo Drive package adds the following elements to your Nuxeo Platform application:

- a Nuxeo Drive tab in the user Home, from which you can see what Nuxeo spaces are synchronized with Drive,



- a Drive icon on folderish document types, to synchronize or unsynchronize spaces.



Installing Nuxeo Drive on Your Computer

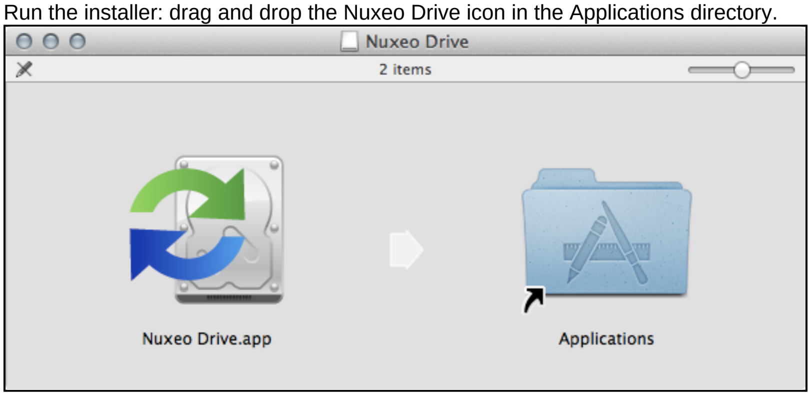
For the installation of the Nuxeo Drive package on the server, please see the Installation and Administration Guide.

To be able to synchronize folders on your computer, you need to install the Nuxeo Drive client on your computer. We provide OS-specific installer for Mac OS X and Windows, available from the Nuxeo Drive tab of the Home. A Linux installer will come shortly.

If you try to synchronize a folder and you haven't installed the Nuxeo Drive client yet or haven't provided your credentials to the Nuxeo Drive client, you are automatically directed to the Nuxeo Drive home tab to install it.

Installing Nuxeo Drive on Mac OS X

To install Nuxeo Drive on your Mac OS X computer:

1. Download the installer (.dmg file) from the Nuxeo Drive tab in the Home.
2. Run the installer: drag and drop the Nuxeo Drive icon in the Applications directory.


Nuxeo Drive is now installed on your computer.
3. You now need to start Nuxeo Drive on your computer.
A Nuxeo Drive folder will be created by the system at the root of your local home folder (/Users/jdoe/). This is the place where synchronized documents will be stored on your computer.

Installing Nuxeo Drive on Windows

Nuxeo Drive is known to work on Windows XP, Windows 7.

To install Nuxeo Drive on your Windows computer:

1. Download the Windows installer (.msi file) from the Nuxeo Drive tab in the Home.
2. Run the installer: indicate where Nuxeo Drive should be installed (typically `C:\Program Files` or `C:\Program Files (x86)`) and click **Next** until the installation process is done.
Nuxeo Drive is now installed on your computer.

> If you have any problem due to a previous installlation of Nuxeo Drive you can try using this Microsoft tool to uninstall it properly.

3. You now need to start Nuxeo Drive to use it.
A new `Nuxeo Drive` Folder will be created by the system in your local Documents folder `(C:\Documents and Settings\USER\Documents\` or `C:\Users\USER\Documents\` depending on the Windows version). This is the place where synchronized documents will be stored on your computer.

Ubuntu/Debian (and Other Linux Variants)

The .deb package of the client is not yet available. In the mean time you can manually install the development version.

To Install Nuxeo Drive on your Linux computer:

1. Install pip using your favorite package manager and then use it to grab all the dev dependencies and tools at once:

```
sudo apt-get install python-pip python-dev python-pyside
sudo pip install -U -r
https://raw.github.com/nuxeo/nuxeo-drive/1.4/requirements.txt
sudo pip install -U git+https://github.com/nuxeo/nuxeo-drive.git@1.4
```

For now, the systray icon is not visible under Unity desktop. As a consequence, the configuration window only appears at the first launch.
2. If you want to change it, issue the following commands:


```
pkill ndrive
rm ~/.nuxeo-drive/nxdrive.db
ndrive &
```

3. Now configure automatic start:

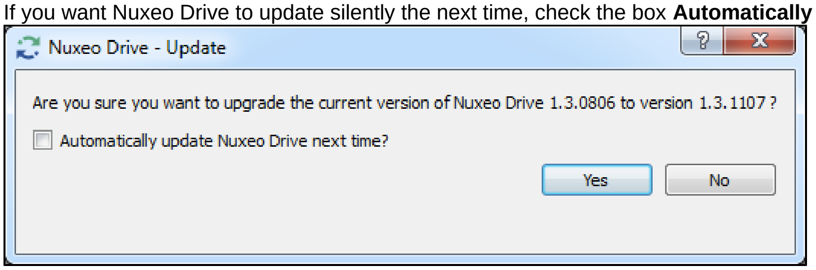
```
curl
https://gist.github.com/jcarsique/5421710/raw/5621c388f85bf6dda7de6d0f726545d6
551b5dde/ndrive.desktop -o ~/.config/autostart/ndrive.desktop --create-dirs
```

4. You now need to start Nuxeo Drive on your computer.
   A `Nuxeo Drive` folder will be created by the system at the root of your local home folder. This is the place where synchronized documents will be stored on your computer.

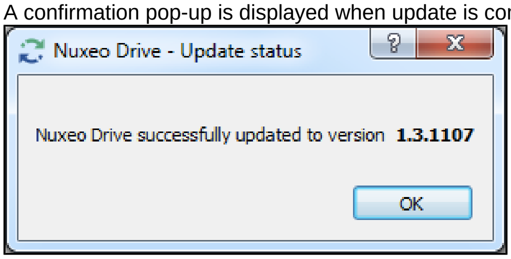
Updating Nuxeo Drive

When a new version of Nuxeo Drive is available, the Nuxeo Drive icon changes to and an **Update Nuxeo Drive** item is available in the Nuxeo Drive menu.

1. Click on that menu item to update Nuxeo Drive to the latest version.
2. If you want Nuxeo Drive to update silently the next time, check the box **Automatically Update Nuxeo Drive next time?**.



3. Confirm update by clicking **Yes**.
   A confirmation pop-up is displayed when update is completed.



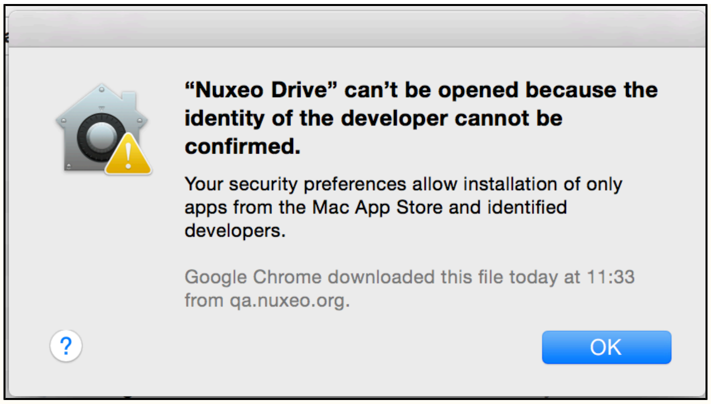
Working with Nuxeo Drive

Starting Nuxeo Drive

After you installed Nuxeo Drive, you need to start it manually and provide the address of the Nuxeo application and your credentials on that application.

1. Start like any other application:
   - On Windows, Nuxeo Drive is started from **Start** > **Programs** > **Nuxeo Drive**.
   - On Mac OS X, Nuxeo Drive is in the Applications directory.

   > When you double click on the icon, a security message appears. To bypass it, you can modify your security settings or click right on Nuxeo Drive application and click on **Open** .

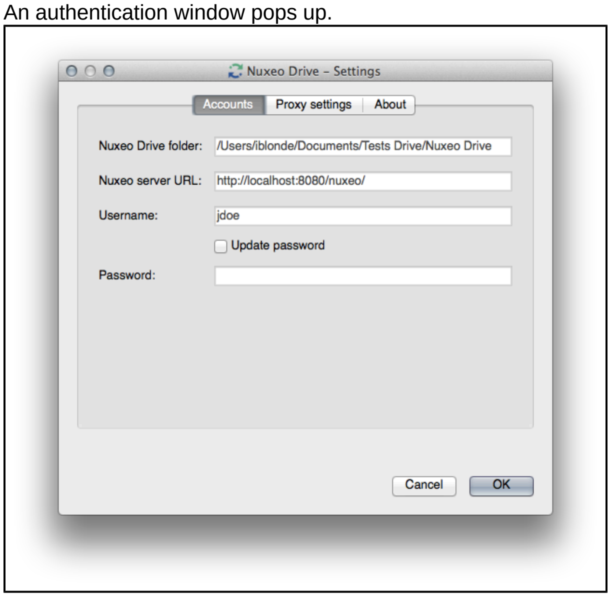


- On Linux, press Alt+F2 then enter `ndrive`.

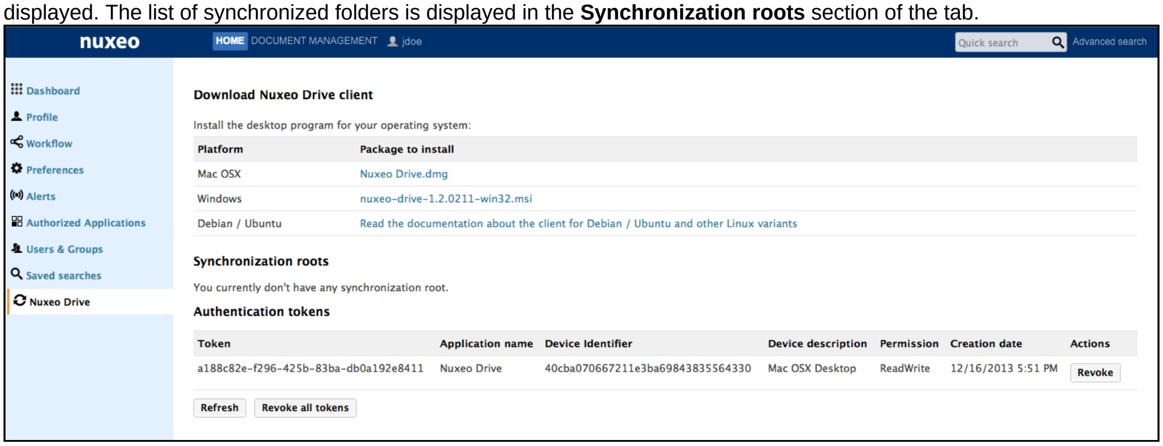
The Nuxeo Drive icon is displayed:

- In the top menu bar on Mac OS X,
- in the system tray on Windows.
- In the system tray on Linux desktops (except Unity).

An authentication window pops up.



2. Type the path where you want your Nuxeo Drive folder to be created.
3. Type the URL of your Nuxeo application, with the `/nuxeo/` suffix (`http://www.mynuxeoapp.com/nuxeo` for instance), your username and your password.
4. Click on **OK**.
   Nuxeo Drive immediately starts synchronizing the Nuxeo workspaces or folders you indicated as synchronized in the Nuxeo Platform. It will automatically update content when there is a modification on the server.
   In the Nuxeo Drive tab in your Home, an authentication token corresponding to the computer you are synchronizing from is displayed. The list of synchronized folders is displayed in the **Synchronization roots** section of the tab.



After you start Nuxeo Drive the first time, it will be automatically started when you start your computer. So you won't need to repeat these steps.

Nuxeo Drive Synchronization Status

Here are the different statuses of Nuxeo Drive:

Icon	Status
	Synchronization is disabled (offline mode or suspended synchronization).
	Nuxeo Drive has successfully synchronized.
	Nuxeo Drive is synchronizing with the Nuxeo Platform.
	An update of Nuxeo Drive is available.
	Nuxeo Drive is ending the synchronization with the Nuxeo Platform

Accessing the Nuxeo Drive Folder

When you install Nuxeo Drive on your computer, it creates a "Nuxeo Drive" folder on your computer, from where you will be able to access the synchronized documents. This Nuxeo Drive folder is located:

- in `C:\Documents and Settings\USER\Documents\` on Windows,
- at the root of your home folder on Mac OS X.

Quick access to this folder is possible at any time using the Nuxeo Drive icon: right-click on the icon (in the top menu bar on Mac OS X, in the system tray on Windows) and click on **Open Nuxeo Drive folder**. The Nuxeo Drive opens like any folder. You can now browse the Nuxeo synchronized folders.

Marking Workspaces and Folders for Synchronization

Nuxeo Drive enables the synchronization of the document types below and their content:

- Document Management module:
  - workspace,
  - folder,
  - picture book,
  - ordered folder,
- Social collaboration module:
  - social workspace,
  - news folder,
- Digital Asset Management module:
  - Asset library domain.

Synchronizing a Folder

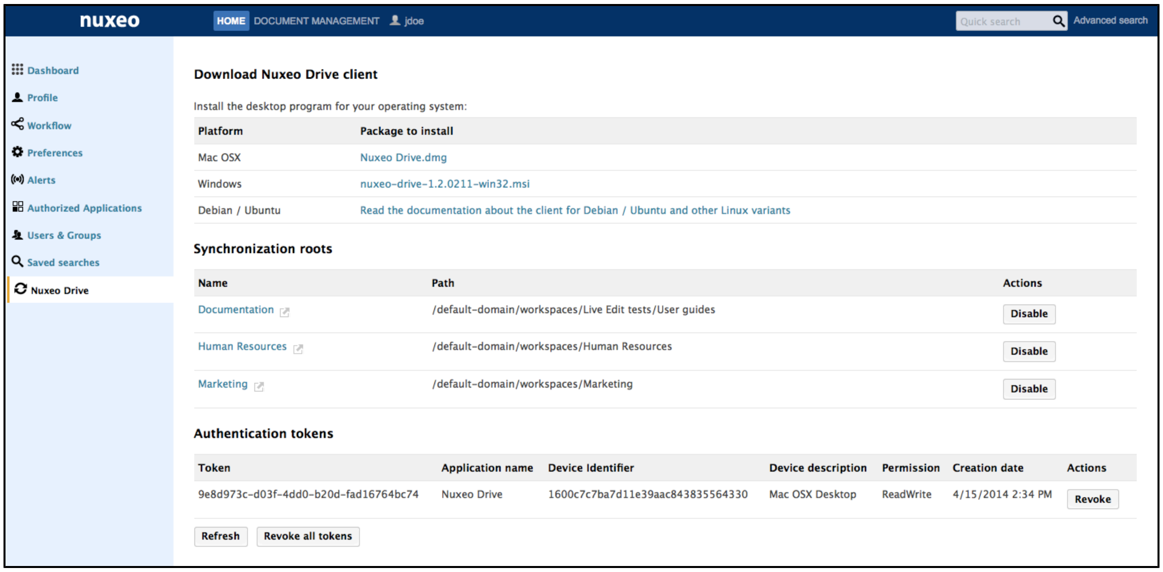
Starting from Nuxeo Platform 6.0, you can synchronize spaces on which you have at least Read rights. For older versions of the Nuxeo Platform, you need at least Write rights to be able to synchronize a space.

To synchronize a space, in the Nuxeo Platform, click on the icon .

The icon becomes green. Documents inside the synchronized space have an orange icon and a Drive local edit icon .

The folder and all its content is now available in your local Nuxeo Drive folder. You can now create, edit, delete documents from your computer. If you only have Read rights, documents are in read-only mode.

On your Home Nuxeo Drive folder, the space is displayed in the "Synchronization root" section. This is where you can see all the spaces you have synchronized with Nuxeo Drive.



Suspending Synchronization

If a synchronized folder holds big document or a large amount of documents, synchronization can take some time and some computer resources. It is then possible to suspend synchronization until a more convenient time.

To suspend synchronization:

1. Click on the Drive icon in the system tray.
2. Click on **Suspend synchronization**.
   Pending synchronization tasks are immediately stopped until you resume synchronization.
   The Drive icon becomes grey as long as synchronization is suspended: .

To resume synchronization:

1. Click on the Drive icon in the system tray.
2. Click on **Resume synchronization**.
   Pending synchronization tasks are immediately restarted where they were suspended.

Unsynchronizing a Folder

There are to ways to desynchronize a folder. From the server, when you desynchronize a folder all its content is desynchronized from all the devices where you use Drive. From the client, when you desynchronize a folder you can do it in detail and choose to locally deactivate synchronization of different folders for the current device.

Unsynchronizing Folders from the Client

By default, once you have synchronized a folder all its content (files and folders) are synchronized, but you can decide locally which folders you want to keep. This feature will enable you to manage the storage space dedicated to the synchronization, which is especially useful if you use a device with a low-storage capacity.

1. Click on the icon (in the top menu bar on Mac OS X, in the system tray on Windows).
2. Go to **Settings**.
   A pop-up window appears.
3. Click on the **Folders** tab.
   You can see all the tree structures of the synchronization root.
4. Unselect the folders that you do not want to keep using the checkboxes.

   > Even if you unselect a folder, it's still visible in your settings, you just have to reselect it to synchronize it.

5. Click on **OK** to confirm.

   > When you deactivate the synchronization of folders locally, they are still marked as synchronized on your web UI.

Unsynchronizing Folders from the Server

Unsynchronizing a folder is only possible from the Nuxeo Platform web interface. You can only unsynchronize the whole synchronized space, i.e. from the synchronization root : it is not possible to unsynchronize a child . Clicking on this orange icon brings you back on the space from which the synchronization is done (called Synchronization root).

To unsynchronize a space, in the Nuxeo Platform interface, click on the icon .
The icon becomes grey, indicating that the space is no longer synchronized.
The folder and its content is no longer available from your Nuxeo Drive folder and from the Home Nuxeo Drive tab.

Creating Documents

From the Platform

When you create a new document in a Drive-synchronized folder from the Platform, it is automatically created in your Drive folder at the next synchronization. If you created a file or a picture, what is in the Drive folder is the attachment (mydoc.doc for instance for Nuxeo document whose title could be "My document").

From the local Nuxeo Drive folder

Adding a new document in a Drive-synchronized folder from your computer will create the document in the Platform workspace at the next synchronization (immediately if you're connected to the Internet or the next time you're online if you currently don't have an Internet access). The document's title is the name of the original file, and no metadata is filled in.

Here are some examples of most commonly used item types and their output in Nuxeo:

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

Editing Documents

Versioning

When you edit a document, either from your Nuxeo Drive folder or using the online editing, a new version is automatically created on the Platform and the version number is updated:

- if you are not the last contributor of the document,
- or if your last edit is more than an hour ago.

Then, if your document's version was 1.0 before modification for instance, it automatically becomes 1.1+ after you edited it from the Nuxeo Drive folder and the 1.1 is archived as it is created. Otherwise, a simple modification is done on the document and logged in the document's History.

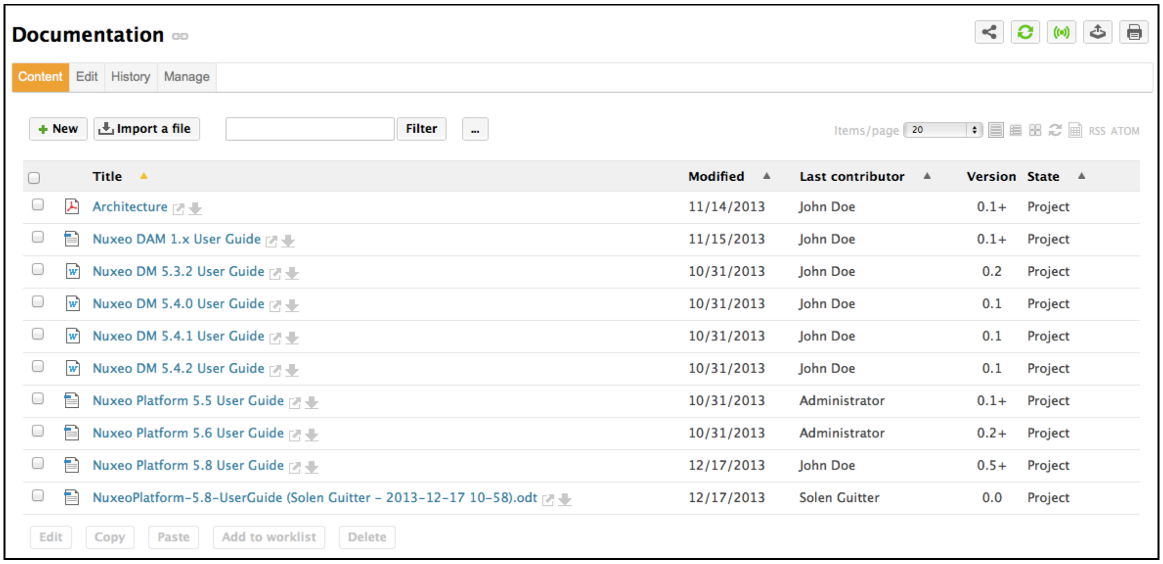
See the page How to Customize Nuxeo Drive Versioning Policy to change this behavior.

Editing a Locked Document

In the Nuxeo Drive folder, no indication is available if a document has been locked from the Nuxeo Platform interface. Nuxeo Drive won't prevent you from working on a document, but it will not update the locked document on the server if you are not the locker.

Managing Conflicts

It can happen that a document is edited by several users locally at more or less the same time. Or that a user edits a document locally in offline mode, and that the same document is modified during that offline period. When Nuxeo Drive tries to synchronize the document it detects that there may be a conflict between the different modifications of the document. To prevent any loss of information or data, a new document is automatically created for the offline edited document. Its title is composed of the file name, the user's name and the date and time at which the document is created: "my-document (John Doe - 2013-04-01 10-11).odt" for instance. Two documents are now available in the Nuxeo Platform and in the local Nuxeo Drive folder.



Online Editing

> Drive Edit is available starting from Nuxeo Platform 6.0.

Drive Edit enables you to edit any of your document's content from their summary tab even if they are not synchronised. To be able to use correctly Drive Edit you need the Drive add-on on your server and you must turn on Drive on your computer. This saves you the fastidious steps of opening your document, modify it and reimport it on your platform.

To edit a document locally from the web interface:

1. On the document in the Nuxeo Platform, click on the icon  in the summary tab.
   The document opens in its native application (OpenOffice.org for an .odt file for instance).
2. Edit the document and save the modifications.
   Modifications are saved in the Nuxeo Platform directly.
3. Close the document.

Drive Edit Limitations

Under Windows, nothing happens if you try to use Drive Edit without having Drive installed and running.

Renaming Documents

Renaming a document from the server, i.e. changing the document's title, has no impact on the file's name in your Nuxeo Drive folder, which is the document's attachment.

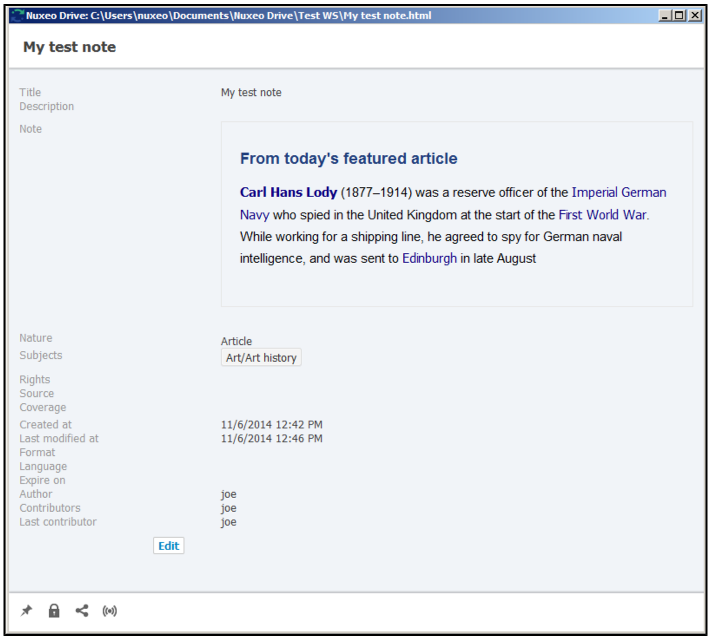
Renaming a document from the Nuxeo Drive folder renames the document and its attachment on the server.

Editing Metadata

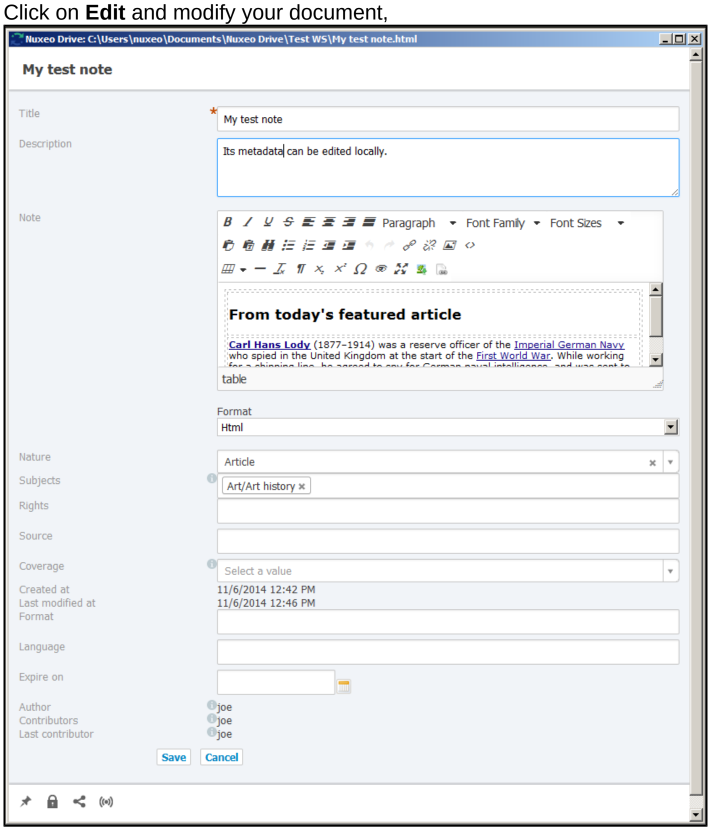
> This feature works only under Windows, and is available starting from Nuxeo Platform 6.0.

Metadata Edit allows you to edit the metadata of your document from your desktop.

1. Go to your Nuxeo Drive folder on your computer,
2. Right-click on the name of the document that you want to edit,
   A pop-up window appears where you can also locked the document, get the permanent link or add your document to your favorites.



3. Click on **Edit** and modify your document,



4. Click on **Save.**

Metadata Edit Limitations

This feature doesn't work for now when the file names are accented, but this issue will be fixed soon.

Moving Documents

You can move documents either from your local Nuxeo Drive folder or from the Platform. When you move documents between two synchronized spaces, the move is done on the other side, whether you move documents from the Platform or from your Drive folder.

When you move a document from a Drive-synchronized folder to an unsynchronized one, the behavior is different if you move the document from the Platform or from your local folder.

- If you move the document from the Platform, the document is not available anymore in your local folder.

- If you move the document from your local folder, the document is deleted on the Platform and moved into the folder's trash. In the document's history, the deletion is tagged with the Nuxeo Drive category.

Deleting Documents

When you delete documents from the Platform, they are deleted from your local Drive folder at the next update.

When you delete a document from your local Drive folder, the document is deleted on the Platform and moved into the folder's trash. In the document's history, the deletion is tagged with the Nuxeo Drive category.

Unauthorizing a Drive Client to Access the Nuxeo Platform

When you start Nuxeo Drive on your computer for the first time, you need to provide your credentials so the Drive client can communicate with the Nuxeo Platform. This creates an authentication token on the Platform, that is displayed on the Nuxeo Drive tab in the Home. If you want to unauthorize a Drive client to access the Nuxeo Platform using your credentials, for instance because you changed your computer, you can revoke this authentication token. The Nuxeo Drive client will then require the credentials to be updated to connect to the Nuxeo Platform.

To revoke an authentication token:

1. On the Nuxeo Platform, in the **Home** tab, click on the **Nuxeo Drive** tab.
2. Click on the **Revoke** button of the token to be revoked. Several elements are displayed to help you identify the right token:
   - the device description: whether it is a client, Windows client, Linux client;
   - the creation time: date and time at which the token was created, i.e. the date and time at which you provided it with your credentials.
3. In the window that pops up, click on **OK** to confirm.
   The Nuxeo Drive client cannot communicate with the Nuxeo Platform and switches to offline. When you click on the Drive icon, it says "Update credentials (required)".

Advanced Usages

You can use the command line for some advanced options. For example, you can bind the server to a specific folder of your desktop, instead of the default "\My Documents\Nuxeo Drive"'. For example you can use:

```
ndrive bind-server --local-folder LOCAL_FOLDER username nuxeo_url
```

Note that `ndrive` is not in your PATH. You need to go to the folder where Nuxeo Drive was setup (in `Program Files` with Windows).

Uninstalling Nuxeo Drive

To uninstall Nuxeo Drive from your computer, you need to remove the following items:

- the .nuxeo-drive hidden folder where configuration and logs are stored,
- the Nuxeo Drive client application.
- the Nuxeo Drive local folder, **only if you want to get rid of all the synchronized files and folders**.

Uninstalling Nuxeo Drive on Mac OS X

To uninstall Nuxeo Drive:

1. Quit Nuxeo Drive:
   a. Click on the icon in the system tray.
   b. Click on **Quit** in the menu.
2. Open a terminal and execute the following command:

   ```
   rm -rf ~/.nuxeo-drive
   ```

3. Remove Nuxeo Drive from your applications like you usually remove any application.
4. Delete the Nuxeo Drive item from your Favorites in the Finder.

> At this point you have uninstalled the Nuxeo Drive program and its configuration. If you want to get rid of the synchronized data you also need to delete the Nuxeo Drive folder like you delete any regular folder.

Uninstalling Nuxeo Drive on Windows

To uninstall Nuxeo Drive:

1. Quit Nuxeo Drive:
   a. Click on the icon in the system tray.
   b. Click on **Quit** in the menu.

   At this point you can check that there are no `ndrivew.exe` or `ndrive.exe` remaining processes in the **Processes** tab of the **Windows Task Manager** that you can open by typing Ctrl + Shift + Esc.

   If you find such processes, kill them manually by right-clicking on their name and clicking on **End Process**.
2. Open a command window:
   - Open the explorer, type `cmd` and validate,
   - or in the Windows menu, click on **Accessories** > **Command Prompt**.
3. Go to your user directory using the `cd` command. Your user directory would typically be in `C:\Users\jdoe.`

```
cd C:\Users\jdoe
```

4. Remove the .nuxeo-drive folder by executing the following command:

```
rmdir /S /Q .nuxeo-drive
```

5. Uninstall the Nuxeo Drive application like a regular program using the Control Panel.

   If you have any problem during the uninstallation process you can try using this Microsoft tool to uninstall Nuxeo Drive properly.
6. Waiting for NXDRIVE-270 to be resolved you also need to manually delete the `C:\Program Files (x86)\Nuxeo` directory.

At this point you have uninstalled the Nuxeo Drive program and its configuration. If you want to get rid of the synchronized data you also need to delete the Nuxeo Drive folder like you delete any regular Windows folder.

Uninstalling Nuxeo Drive on Linux

To uninstall Nuxeo Drive:

1. Quit Nuxeo Drive:
   - Click on the icon in the system tray.
   - Click on **Quit** in the menu.
2. Open a terminal and execute the following command:

```
rm -rf ~/.nuxeo-drive
```

3. Uninstall the Nuxeo Drive application using the following command:

```
sudo pip uninstall nuxeo-drive
```

   At this point you have uninstalled the Nuxeo Drive program and its configuration. If you want to get rid of the synchronized data you also need to delete the Nuxeo Drive folder like you delete any regular Linux folder.

In this section

Nuxeo Groups and Rights Audit

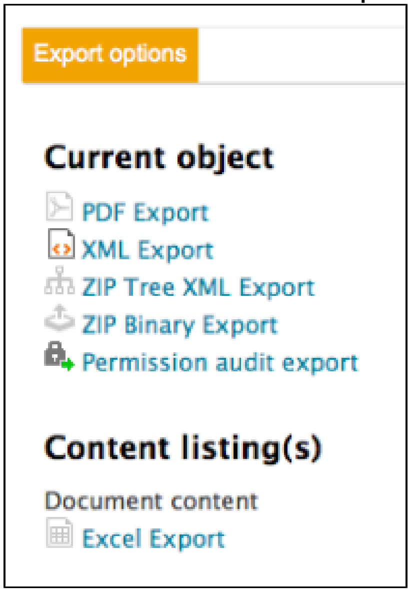
The Nuxeo Groups and Rights Audit addon generates an Excel matrix listing every exported documents with permissions for each user.

Only administrators can do an audit of the permissions of a folder.

To get an audit of the permissions set on a folder and its children:

1. On the folder, click on the icon .

2. Click on the link **Permission audit export**.



The export is processes as a background task. You will receive an email with the exported Excel file when it is completed.

Related documentation
• Nuxeo Groups and Rights Audit dev doc

Nuxeo jBPM

The Nuxeo jBPM package was last released in Fast Track version 5.7.2. Please check its latest LTS (5.6) documentation.

Nuxeo Jenkins Report

The Nuxeo Jenkins Report addon enables users of the Nuxeo Platform to generate and send reports on the status of the Continuous Integration on Jenkins, directly from the Nuxeo Platform. This addon is for development teams, to help them follow and share the status of their continuous integration, while leveraging the content management features of the Nuxeo Platform.

This addon enables users to create Jenkins Reports Containers, in which the reports will be stored. Users will then be able to generate reports. The workflow of a report is the following:

1. A developer generates a report.
   He gets a status of the continuous integration, that indicates which jobs are successful and which ones are failing.
2. On Jenkins, he updates failing jobs with a description explaining the reason why the job fails or any relevant information.
3. In the Nuxeo Platform, he updates the report, so as to get the descriptions and information he just filled in on Jenkins.
   He gets a report trend when the status changes.
4. He fills in the Jenkins Duty Comments.
   This comment enables developers to explain the trends of the report, to summarize the automatically generated report and gather related issues. Other developers can have a look at this comment and have an idea of what is currently going on on the CI system without having to scroll down the all jobs lists.
5. When this summary is done, he can send the report by email to the e-mail address that was set up on the Report Container.

Each of the steps is explained in details below.

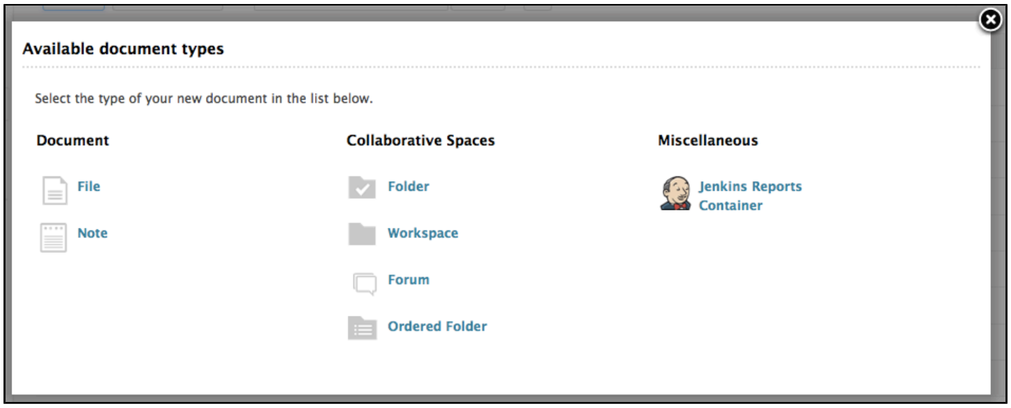
Creating a Jenkins Reports Container

The Jenkins Reports Container is where Jenkins reports will be generated and stored. It defines from which Jenkins instance reports will be generated. It also defines to what e-mail address reports will be sent to. It also enables you to define a planning of who is going to be in charge of generating the reports and when.

Jenkins Reports Containers can be created in workspaces and folders, by users who have at least Write rights.

To create a Jenkins Reports Container:

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



3. Fill in the creation form.
4. Click on the **Create** button.
   The **Summary** tab of the container is displayed. It holds no report for now.

Jenkins Report Container metadata

Field	Description
Title	The name of the folder
Description	A short text that explains what will be in the container, for instance what project it will be about.
Jenkins View URL	The URL from which the report will be generated, allowing you to define reports depending on the view configuration in Jenkins.
Jenkins Claims URL	The URL where Jenkins claims are visible (sadly not showing claims for multi-db jobs)
Report email	The e-mail address to which users will be able to send the reports to. It can typically be a mailing list address for your development team.
Jira Browse URL	The URL of the JIRA instance that will be referenced from Jenkins. This is used with the "JIRA projects" to generate clickable links in the reports to the JIRA issues.
Jira projects	The ID of the JIRA projects that will be referenced from Jenkins. This is used with the "JIRA Browse URL" to generate clickable links in the reports to the JIRA issues.
Duty planning	Indicate if you have a planning of who will be in charge of doing the Jenkins reports and when.

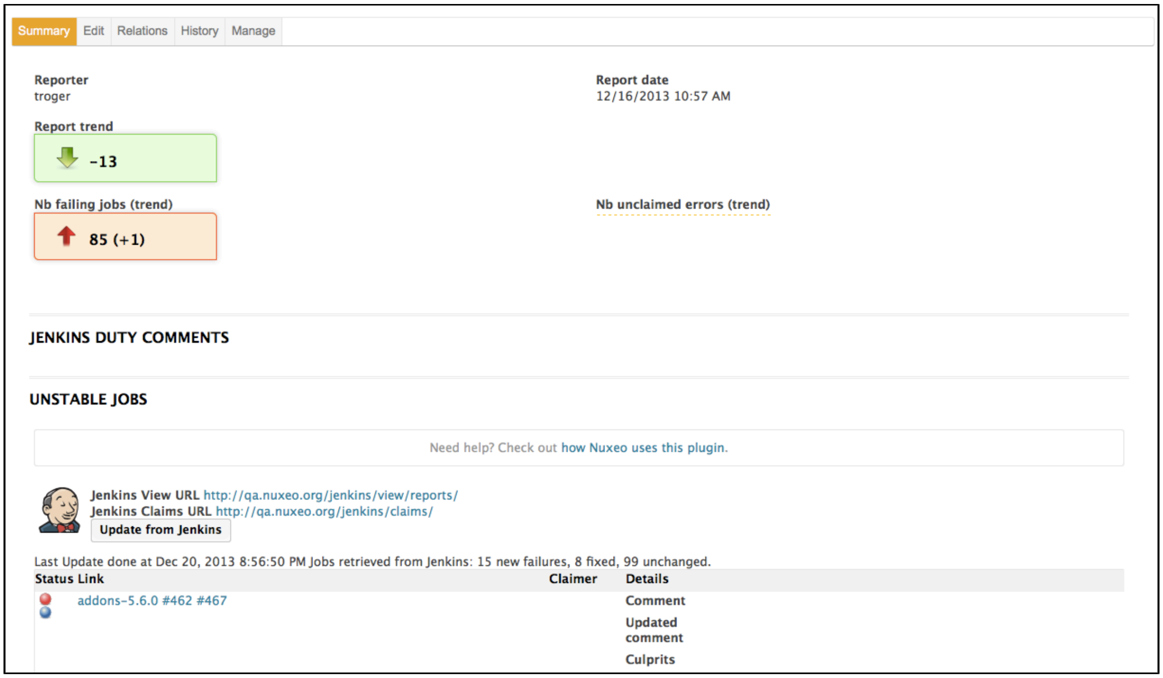
Creating a Report

To create a Jenkins report:

1. On the Jenkins Reports Container **Summary** tab, click on the **New Jenkins Report** button.
   The Jenkins report creation form is displayed.
2. Fill in the form.
3. Click on the **Update from Jenkins** button to get the list of unstable jobs.

   You can get this list after you created the report, by clicking the **Update from Jenkins** button from the report's Summary or Edit tabs.

4. Click on the **Create** button.
   The Summary tab of the report is displayed. It shows the information below:
   - The trend of the report: the trend is currently 0 since this is the first version of the report. It will be updated when you update the report.
   - The number of failing jobs and unclaimed errors and their trends as compared with the previous report;
   - The Duty Comment, as filled in on the Creation form;
   - The list of unstable jobs.



You can now take a look at the failing jobs and update the report.

Jenkins report metadata

Field	Description
Title	This is prefilled with the current date, but you can edit it to put any name that is relevant for your report.
Reporter	This is already filled in with the current user. It can be changed with any user of the application using the suggestion search.
Report date	Date of the report. Already filled in with the current date.
Previous nb failing jobs	The number of failing jobs from the previous report. This number must be manually filled in.
Previous nb unclaimed errors	The number of unclaimed jobs from the previous report. This number must be manually filled in.
Unstable Jobs	
Jenkins Duty Comments	A summary of the report. This is usually filled in after a first version of the report has been audited and the report has been updated. See the Updating a report section.

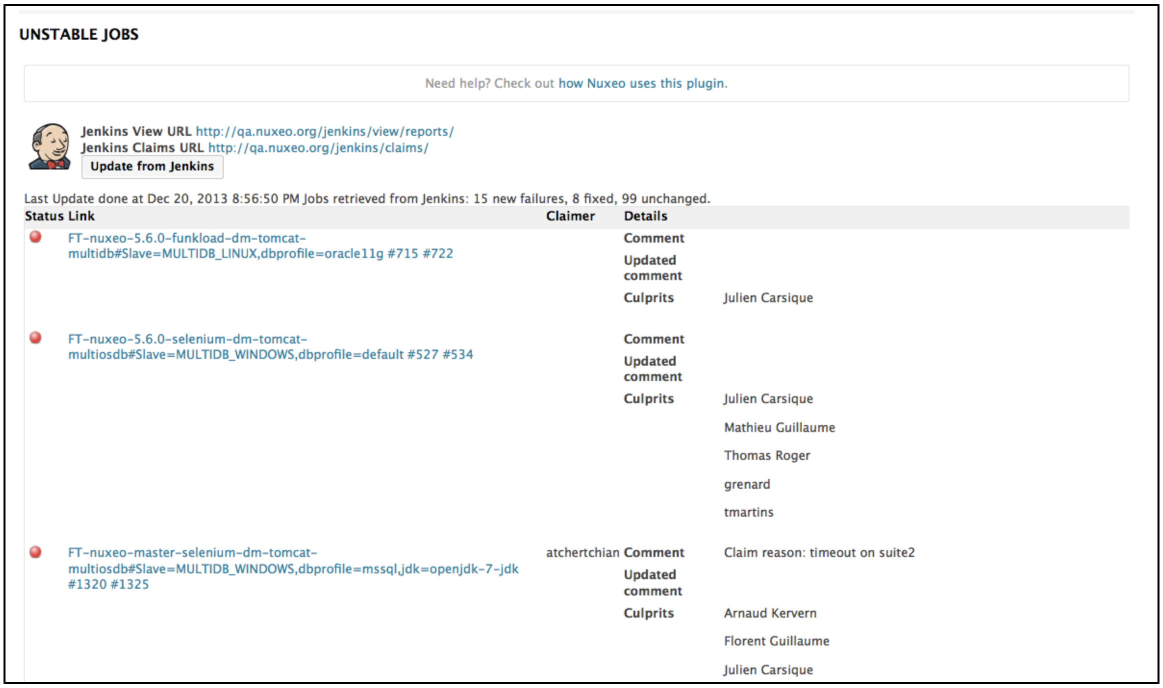
Updating a Report

Examining unstable jobs

After a report has been created, you need to take a look at the unstable jobs to see what makes them fail.

The report displays the list of unstable jobs with the information below to help you examine them:

- Status: an icon that shows the job's status;
- Link: a link to the job, and a link to the last build at the moment of the report creation;
- Claimer: the developer who claimed the job. This is most probably empty at the time the report is created;
- Details: Information about the job.



What you now need to do is to go on the problematic builds for unstable jobs on Jenkins and add a description to the build. This description is then displayed in the job's details after you update the report in Nuxeo.

Updating the Report With Latest Jenkins Changes

After you examined the unstable jobs and added descriptions where they were relevant in Jenkins, you can update the report in Nuxeo so other developers can see the jobs qualification you just did.

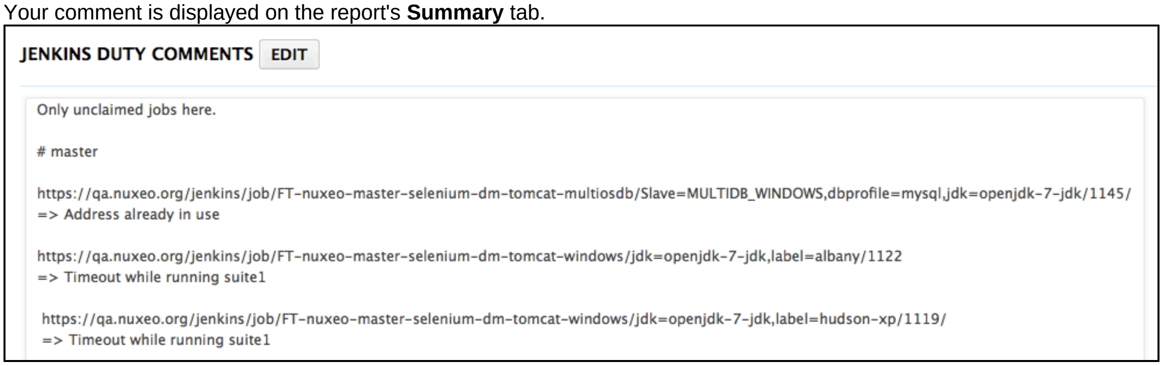
To update a report, click on the **Update from Jenkins** button on the report's **Summary** tab, The report is updated. This means that:

- The jobs that were unstable when the report was created are updated with the description you provided. If another build of the job occured since the report creation, it is added to the initial build in the Link column. If the job's status changed, an icon showing its new status is added to the initial status icon.
- If new jobs are unstable, they are appended to the list of jobs, and a warning icon is displayed at the beginning of their row.
- A trend is computed, showing if more or less jobs are unstable between the report creation and the last update.

Filling In the Duty Comment

You can now make a summary of the CI status in the Jenkins Duty Comment field. This uses the same editor as a note, which enables to add links to jobs and format your comment so it's easier to organize and read.

To fill in the Jenkins Duty Comment:

1. In the Jenkins Duty Comment section of the report's **Summary** tab, click on the **Edit** button.
2. Type your content and format it as you wish.
3. Click on the **Save** button.
   Your comment is displayed on the report's **Summary** tab.
   

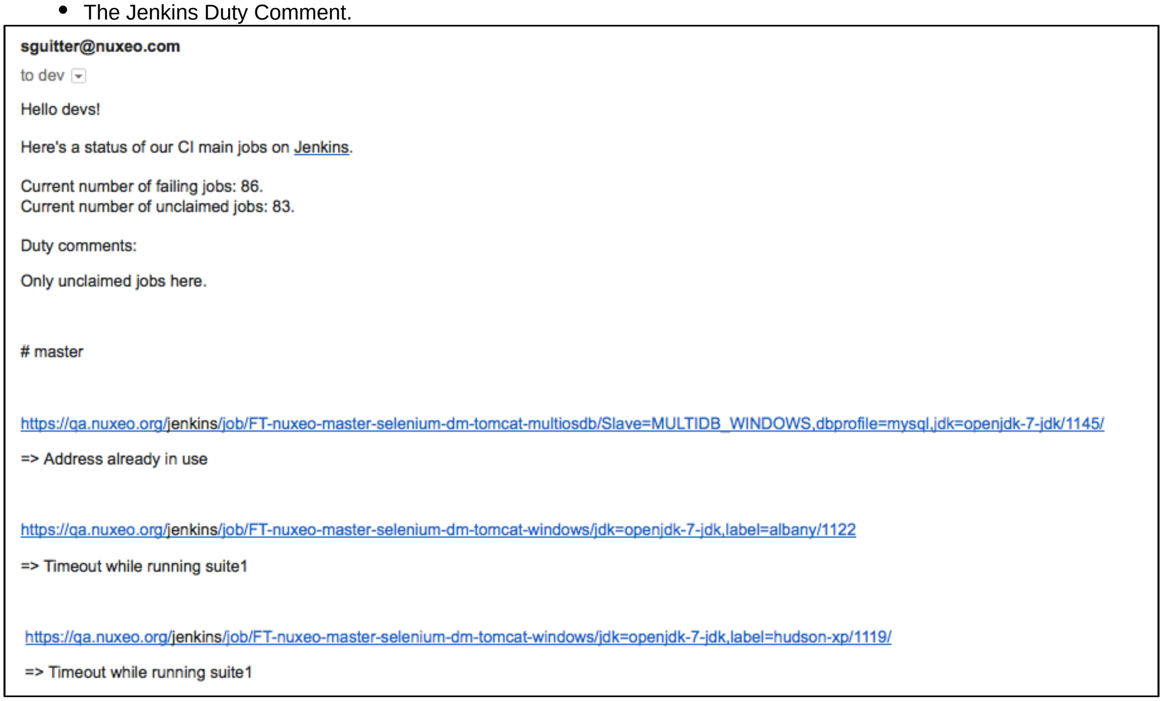
   You can now send the report.

Sending a Report

After you created and updated the report, you want to share it to the team. The Report Container is configured to enable sending reports to a predefined e-mail address. This e-mail address was filled in when the container was created, and can be edited at anytime from the **Edit** tab of the container.

To send the report:

1. Click on the icon .
   A confirmation window pops up. You can see the e-mail address the report will be sent to.
2. Click on **OK** to confirm.
   An email is send the e-mail address. This email includes the information below:
   - The number of failing jobs,
   - The number of unclaimed jobs,
   - The Jenkins Duty Comment.


sguitter@nuxeo.com
to dev

Hello devs!

Here's a status of our CI main jobs on Jenkins.

Current number of failing jobs: 86.
Current number of unclaimed jobs: 83.

Duty comments:

Only unclaimed jobs here.

master

https://qa.nuxeo.org/jenkins/job/FT-nuxeo-master-selenium-dm-tomcat-multiosdb/Slave=MULTIDB_WINDOWS,dbprofile=mysql,jdk=openjdk-7-jdk/1145/

=> Address already in use

https://qa.nuxeo.org/jenkins/job/FT-nuxeo-master-selenium-dm-tomcat-windows/jdk=openjdk-7-jdk,label=albany/1122

=> Timeout while running suite1

https://qa.nuxeo.org/jenkins/job/FT-nuxeo-master-selenium-dm-tomcat-windows/jdk=openjdk-7-jdk,label=hudson-xp/1119/

=> Timeout while running suite1

In this section

Related Documentation

- Jenkins duty
- Nuxeo Jenkins Report dev documentation

Nuxeo Multi-Tenant

The Multi-tenant addon enables to have domains, or tenants, that are independent from each other, with their own users, vocabulary values etc.

It is possible to have several tenants on the default Nuxeo Platform, but they all share the same vocabularies definition and users. This means that when users configure the access to a workspace, for instance, and search for users, they can see all the users of the application. The multi-tenant addon modifies this behavior and enables domains to be completely isolated from each other, including their users and vocabulary values.
The tenant structure is the same a the default domain on a default Nuxeo Platform application.

Global Administrator vs Tenant Administrator

The multi-tenant addon adds the notion of global administrator and tenant administrator to the Nuxeo Platform.

Global administrators technical administrators in charge of the configuration of the whole application through the Admin Center. The Administrator default user is a global administrator. For instance, they can install updates and new modules to the Platform, restart the server, configure the Platform so it can be accessible from other applications, etc.

Tenant administrators are functional administrators who have access to a "light" version of the Admin Center. From there, they can create and edit users and group, modify vocabularies and configure the default dashboard. Their changes are applied to their tenant only, instead of the whole application.

On this page

Activating Multi-Tenancy

Multi-tenancy is not automatically available on your Nuxeo Platform after the package has been installed. You need to activate it.

To activate multi-tenancy:

1. In the Admin Center, click on the **Tenant isolation** tab.
2. Click on the **Enable** button.
   Tenant isolation status goes to "enabled".
   You can now create new tenants.

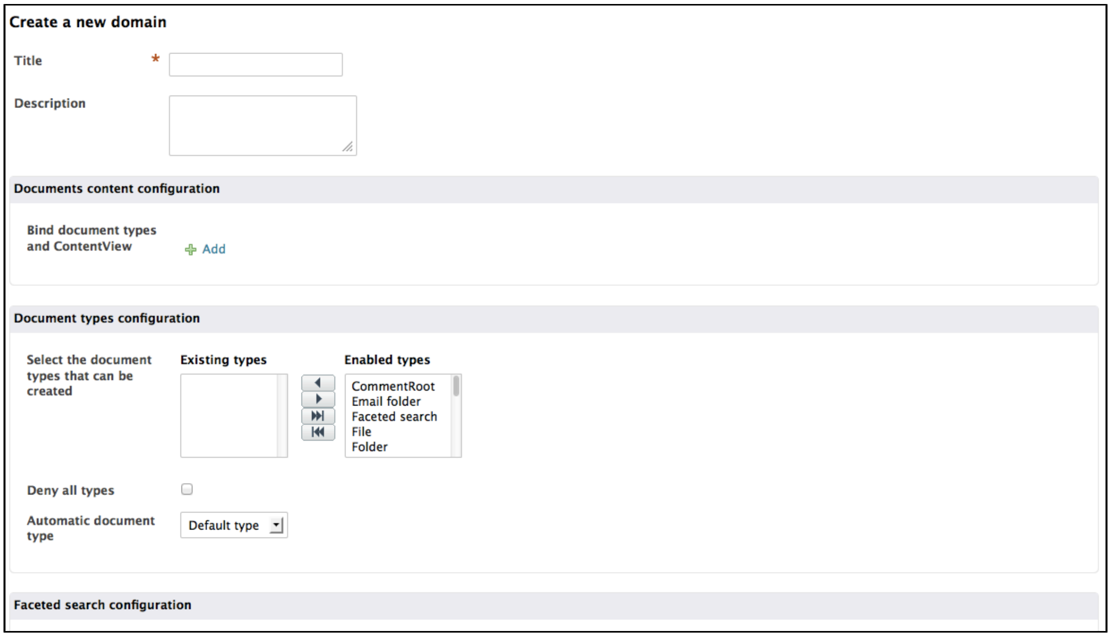
Creating a New Tenant

Only global administrators can create new tenants.

When a global administrator creates a new tenant, he needs to define some elements of local configuration.

To create a new tenant:

1. On the page "Domains of the default server", click on **Create a new domain**.
2. Fill in the creation form.
   - Give the tenant a title and optionally a description.
   - Select the presentation of content lists in the domain.
   - Select which document types should be available or not in the tenant.
   - Select the advanced and faceted search forms that should be used in the tenant.



3. Click on **Create**.
   The **Content** tab of the new tenant is displayed.
   The tenant is accessible by administrators only. You now need to define who the tenant administrator(s) is or are.

Defining the Tenant Administrator

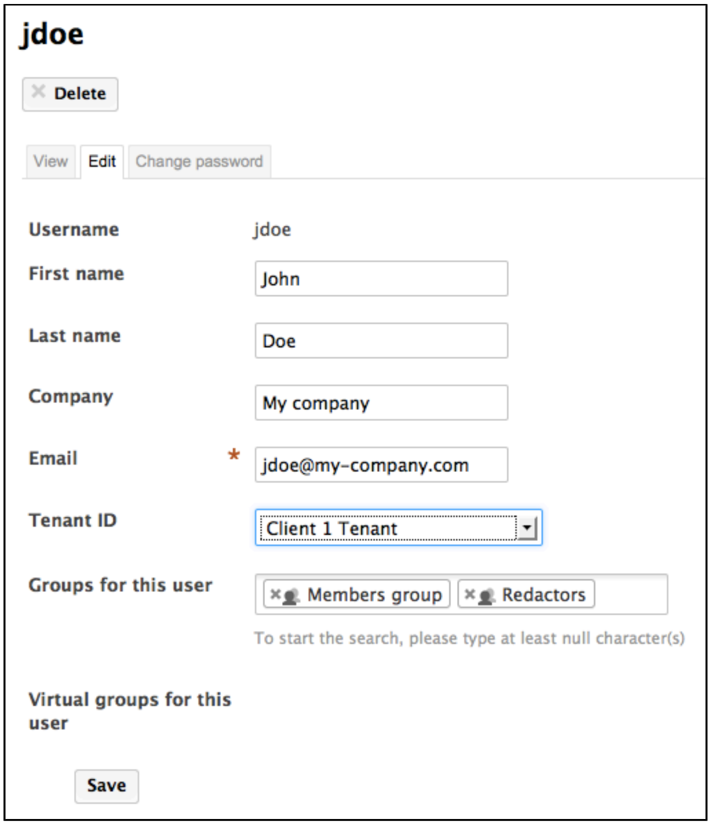
Tenant administrators can create new users and manage access to the tenant. They can also edit vocabularies to customize the metadata values.

When the tenant is just created, the global administrator should define at least one tenant administrator, who will then be able to delegate access rights and possibly define other tenant administrators.

It takes two steps to make a user a tenant administrator.

Step 1: Edit the user's properties to associate him with a tenant:

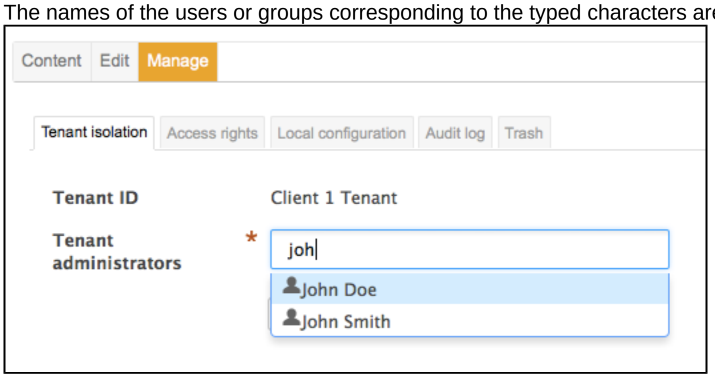
1. Click on the Admin Center main tab, and then on the Users & groups tab.
   The members management interface opens on the user directory search form.
2. Search a user and click on the user's name to open his or her card.
   The user's card is displayed.
3. Click on the Edit tab.
4. In the **Tenant ID** list, select the domain you want the user to be an administrator of.



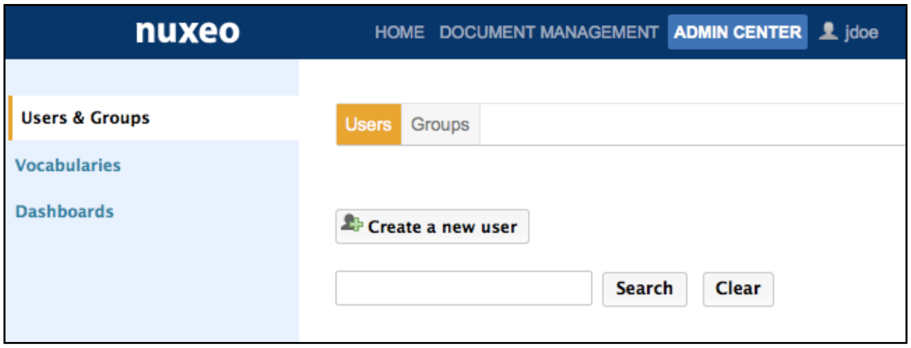
5. Click on the **Save** button.
   The **View** tab is displayed with your modifications.
   The user now has access to the tenant. You now need to declare him as an administrator of the tenant.

Step 2: Declare the user as a tenant administrator:

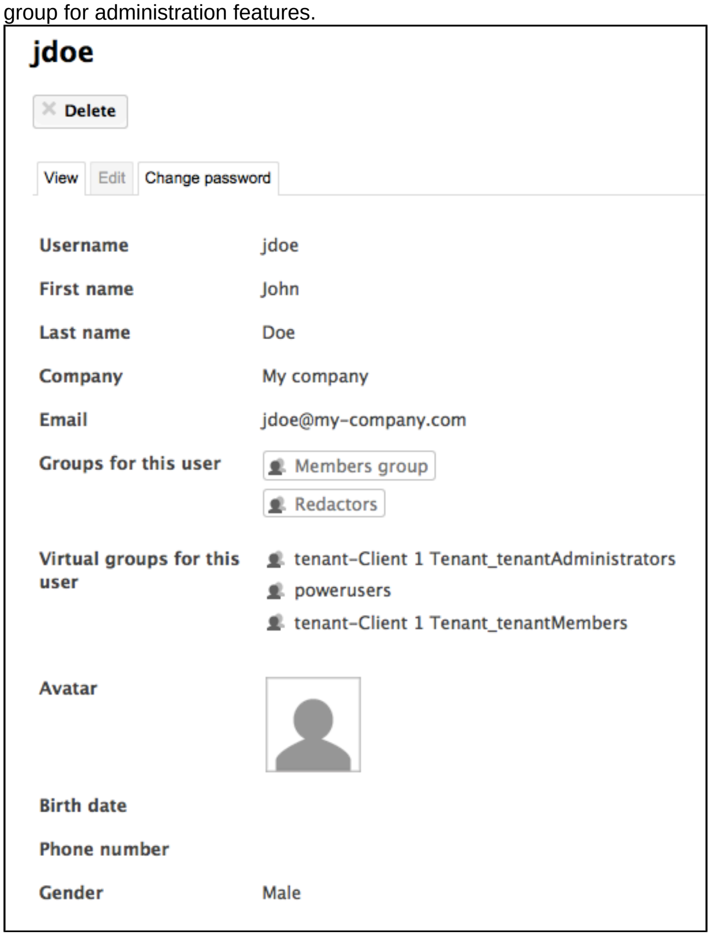
1. On the domain root, click on the **Tenant administration** tab.
2. In the first tab **Tenant isolation**, type the username, first name or last name of the user you want to be an administrator.
   To make all the members of a group administrators, type the group's name.
   The names of the users or 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. Click on **Save**.
   The user now has access to the tenant administration and to the **Users and groups**, **Dashboards** and **Vocabularies** tabs of the Admin Center.



The user is automatically added in two virtual groups: a **powerusers** groups for functional administration and a tenant administrators group for administration features.



Giving Access to the Tenant

On a default installation of the Nuxeo Platform, access rights are configured so members have read access to the content. This behavior can be modified by changing the access rights.

Users created by the tenant administrators automatically have "Read" access to the tenant. Indeed, they are automatically members of a virtual group that has "Read" right on the tenant. They don't need to be part of the default "members" group, being a member of the tenant is enough to access content.

Tenant administrators can then delegate access rights in the tenant, which will define what the user can do in the tenant.

Defining the Tenant Specific Vocabulary Values

Tenant administrators can edit the vocabularies to customize the metadata values displayed to the tenant users.
See the Managing Vocabularies page.

Related user documentation

- Managing Users and Groups
- Managing Access Rights
- Managing Vocabularies

Nuxeo Platform Explorer

Nuxeo Platform User Registration

The Nuxeo Platform User Registration addon enables users to invite external users to access a specific space of the Platform or a limited set of spaces. The invitations must be approved by an administrator of the Platform.

> The user registration feature is included in the Social Collaboration module.

The user registration process takes three steps:

1. A user with Manage everything right invite one or several persons to access a workspace (or another type of space).
2. The administrators of the application review this invitation and accept or reject it.
3. If the invitation has been accepted by the administrators, an email is sent the invited user(s) so he validates his invitation.
   If the invitation has been rejected, it is canceled.

On this page

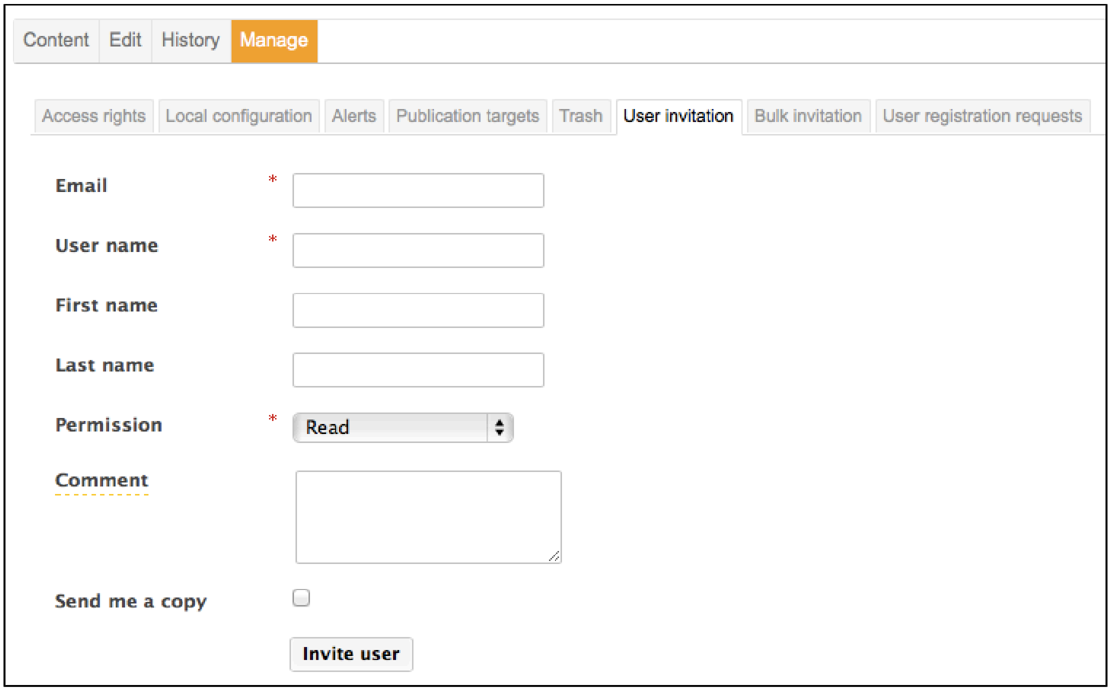
Inviting Users

Inviting a Single User to the Platform

Users with Manage rights on workspaces or section can invite users to the Platform.

To invite a user:

1. On the space, click on the **Manage** tab.
   The **Access Rights** subtab is displayed.
2. Click on the **User invitation** tab.
3. Fill in the form (see below for details).



4. Click on the **Invite user** button.
   The administrators now have to approve the invitation so the invited user receives an invitation by email.

Invitation form details

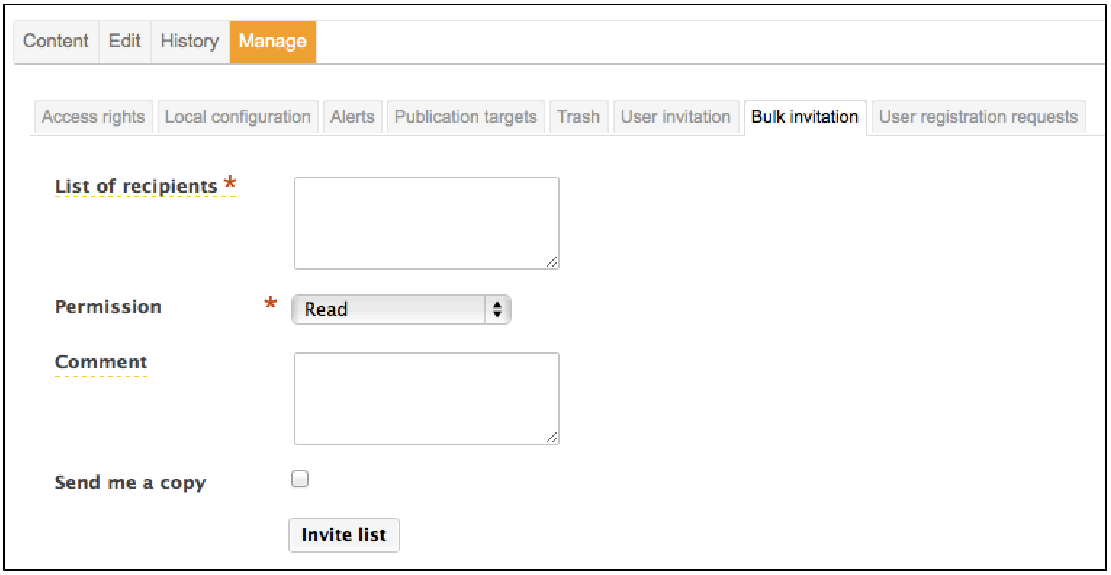
Field	Description
Email	The email address to which the invitation will be sent.
User name	The username the invited user will use to log in.
First name	The invited user's first name.
Last name	The invited user's last name.
Permission	The access right you want to give the invited user on the space.
Comment	A comment for the invited user to explain why he's invited, for instance. This comment will be in the invitation email.
Send me a copy	Your email address will be in the Cc recipients of the invitation email.

Inviting Several Users

It is possible to invite several users at the same time. You just need to provide their email addresses and indicate what permission they will have on the space. After the administrator has approved the invitations, the invited users receive an email to validate their invitation and which contains their credentials to the Platform. Their email address is their login and the Platform automatically generates a password.

To invite several users at the same time to a space:

1. On the space, click on the **Manage** tab.
   The **Access Rights** subtab is displayed.
2. Click on the **Bulk invitation** tab.
3. Fill in the form (see below).



4. Click on the **Invite list** button.
   The administrators now have to approve the invitations so the invited users receive an invitation by email.

Bulk invitation form details

Fields	Description
List of recipients	The email addresses of the users you want to invite to the space. The email address will be their login. Be careful to use `;` to separate the different email addresses, it is the only accepted separator. If you use another separator (like the `,` for instance, only one invitation will be created.
Permission	The access right you want to give the invited users on the space.
Comment	A comment for the invited user to explain why he's invited, for instance. This comment will be in the invitation emails.
Send me a copy	Your email address will be in the Cc recipients of the invitation emails.

Managing Pending Invitations

When users invite external people to access the Platform, a new user account is created for this new external user. This is why the invitation must be accepted by an administrator before the invitation is actually sent.

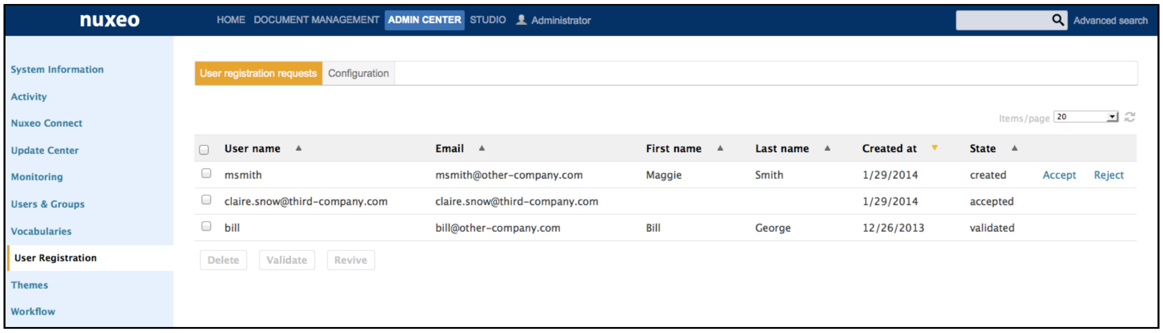
Invitations can have different statuses:

- created: a local manager invited a user; administrator now have to approve or reject the invitation and the required user account creation;
- accepted: an administrator has approved the invitation; the needed user account is created and an invitation email is sent to the user;
- rejected: an administrator has refused the invitation and the creation of the required new user account.
- validated: the invited user has confirmed he received the invitation by clicking on the validation link in the invitation email.

Accepting an Invitation

To accept an invitation:

1. In the **Admin Center**, click on the **User Registration** tab.
   The **User registration requests** tab is displayed. All invitations are displayed.

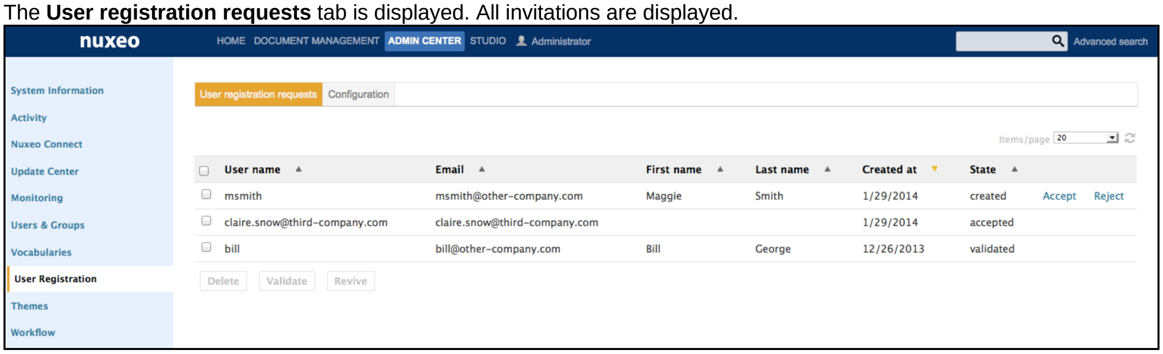


2. Click on the **Accept** link of the invitation to validate.
   The invitation now has the state Accepted.
   The invitation email is sent to the user, who will need to validate his invitation by clicking a link in the email.

Rejecting an Invitation

To reject an invitation:

1. In the **Admin Center**, click on the **User Registration** tab.
   The **User registration requests** tab is displayed. All invitations are displayed.



2. Click on the **Reject** link of the invitation to validate.
   The invitation now has the state Rejected.

Validating Your Invitation

When you have been invited to a workspace, a folder or any type of space in the Nuxeo Platform, you get an email with a link to validate your invitation.

Click on that link to validate your invitation.

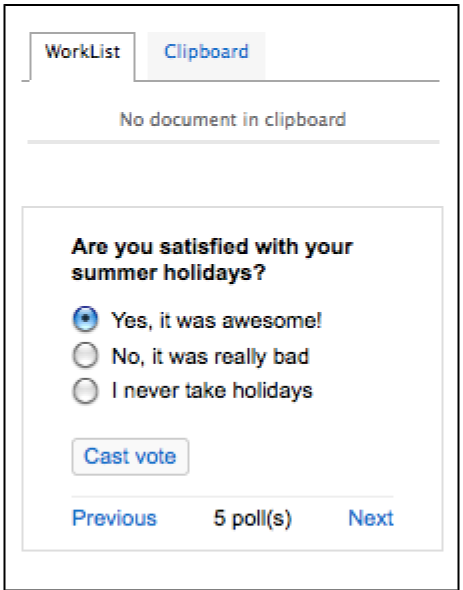
The login page is displayed. You can then log in with the credentials in the email.

> ⚠ You should update your password in the Nuxeo Platform after logging in the first time.

Nuxeo Poll

The Nuxeo Poll package enables Nuxeo Platform users to create surveys and have a visual overview of the results.

To make polls visible to users without making them find them, they are displayed to users in he left column of the page, below the Worklist. This way, open polls are always displayed to the user so he can vote on it at anytime.



On this page

Creating a New Poll

Poll can be created only in spaces that have the "SuperSpace" facet. On a default Nuxeo Platform, this means workspaces, sections and templates. Only users with Manage everything right in these spaces can access the **Polls** tab and so create new polls.

To create a new poll:

1. On a workspace, section or template, click on the **Polls** tab.
2. Click on the **Create a new poll** button.
3. Fill in the creation form and click on the **Create** button.
   The poll is created. Depending on the start date you selected, the poll is immediately started or not:

- if the start date is the current date, the poll is immediately started and users can start voting;
- if the start date is after the current date, the poll is not started immediately. Users don't see it yet. The poll will start automatically when the starting date is reached. Or you can start the poll before by clicking the **Open it** link in the **Poll status** box.

Poll parameters

Field	Description
Question	Type the question users will be answering.
Description	Type an optional text that explains why you do this poll for instance. This description is not displayed to users in the poll widget.
Answers	Click on **Add** and type the first possible answer in the displayed text box. Repeat this for each choice users will have.
Start Date	Select the date from which the poll should be available to users.
End Date	Select the date at which the poll will close.

Defining Who Can Participate to the Poll

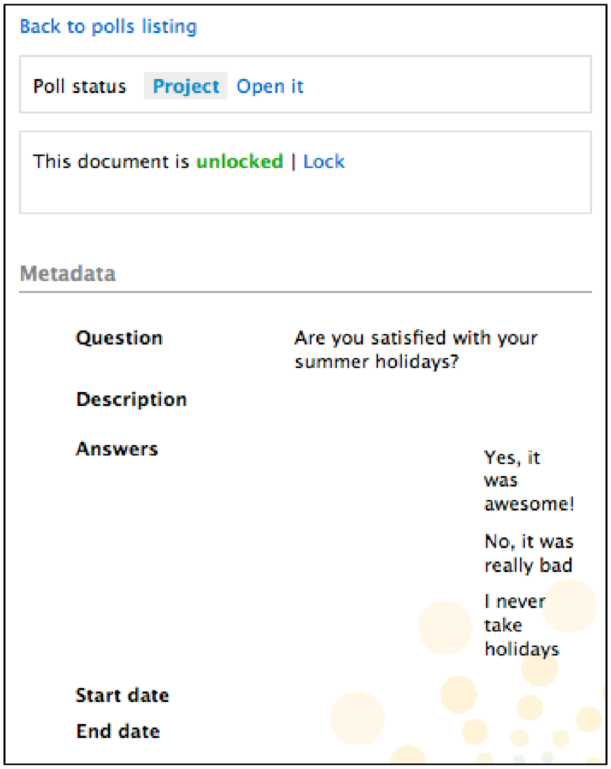
Polls are created in workspaces and sections. By default, the same access rights are applied on the poll as on the space in which they are created. This means that by default the poll is displayed to the users that have access to the workspace or the section. However, you may want to address more users, or on the contrary only a specific population of users. You can manage the access rights on the poll directly.

To be able to participate to the poll, users just need to have Read access to it. It is then automatically displayed to them on the left column of pages below the worklist, until they vote on it or the poll ends.

Opening a Poll

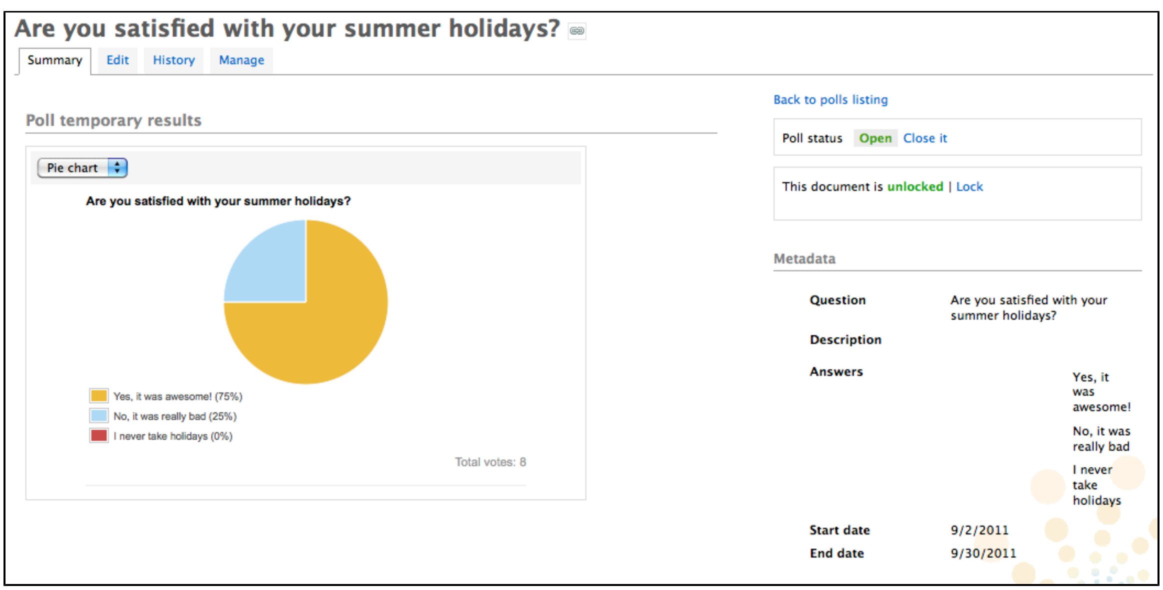
When you create a poll, you can indicate when the poll should start. If you select the current date as the starting date, the poll is immediately "Open" and available to users. However, if you select a future date, the poll is "In project" and is not displayed to users yet. In that case, the poll will automatically be opened by the system when the start date is closed.

If you haven't selected a start date, you can open the poll manually at any time by clicking the **Open it** link in the **Poll status** box on the **Sum mary** tab. The poll is then started and displayed to users.



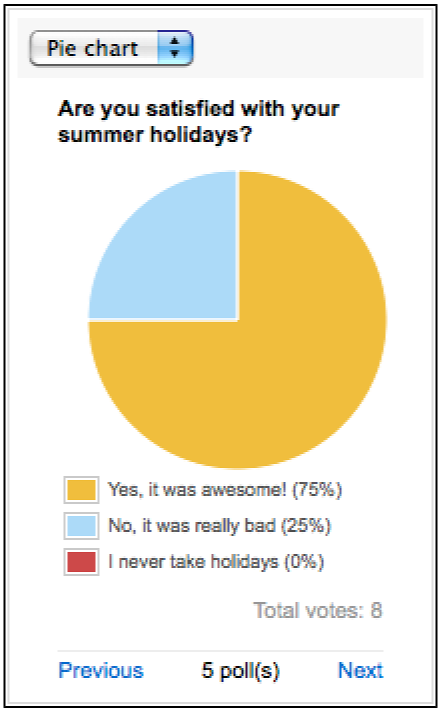
Closing a Poll

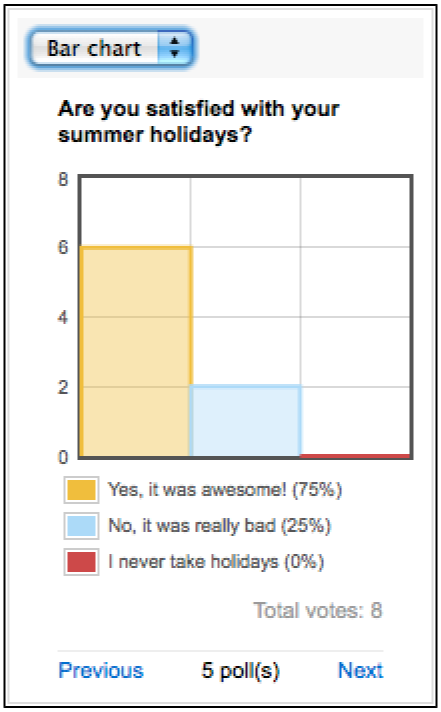
Just like you indicate when the poll should start, you can also select an end date. In that case, your poll will automatically close when the end date is reached. If you haven't selected an end date, you can close it manually at any time by clicking the **Close it** link in the **Poll status** box on the **Summary** tab.
The poll results are now displayed on the poll Summary tab. Users cannot vote on the poll, which is not displayed in the poll widget in the left column.



Participating to a Poll

When a poll is open, it is automatically displayed to users in the left column of pages so they can vote on it. To vote on a poll, select your answer and click on the **Cast vote** button. The temporary results of the poll are displayed. The poll is not available anymore for votes or consultation after you browsed another page or logged out.By default, results are displayed as a pie chart. Use the drop down list to display them as a bar chart.





Other documentation about this package

- Nuxeo Poll dev documentation

Nuxeo Quota

The Quota package enables users to define a maximum size for the domains and workspaces they manage and provide some statistics about space use in your application.

Quota Overview

The Quota package allows to define a maximum size on spaces and to display the number of items (workspaces, folders, documents) in a folderish document on the navigation tree.

Administrators are responsible for managing quotas on a global scale. Non-administrator users can manage the size limits of domains and workspaces on which they have Manage everything permission. All users are displayed the size of the document they are on (workspaces, folder, file, note, etc...) and the maximum size allowed (quota) if one has been defined. On a folderish document, such as a workspace, the used space includes the size of all the documents displayed in the Content tab and their versions and the size of the deleted documents (i.e. in the Trash tab of the workspace). On a document of type File for example, the used space is the sum of the size of the current document version (possibly a modified version) and the size of the archived versions of the document.

In this section

Used space when the document has only one version
When you edit a document and save it as a new version (i.e. increment the document's version), the newly archived version is displayed until the document is modified. When the document is modified, you are displayed an unarchived modified version of the document, whose version number is based on the last archived version suffixed with a + sign. As a consequence, when the document only has one archived version, typically when its first version is created, the used space is the size of the newly archived version. As soon as the document is modified, the used space of the document is the sum of the archived version and the modified unarchived version.

More information on how versioning works

Users can also see statistics on how space is used.

When users try to create or edit a document and the maximum size of the workspace is / will be reached, they are displayed a message indicating that they need to free some space.

Statistics

Statistics are available to show users:

- the list of documents and their size,
- the total size of live documents (i.e. documents visible in the Content tab of workspaces, sections, folders, etc),
- the total size of deleted documents that are still in trash,
- the total size of the archived versions for a document.

Statistics help users to understand where space is used. They provide answers to the following questions: does the trash need to be emptied, are there a lot of big archived versions, what are biggest documents?

Global Management of Quotas

Administrators can perform several actions regarding quotas from the Admin Center:

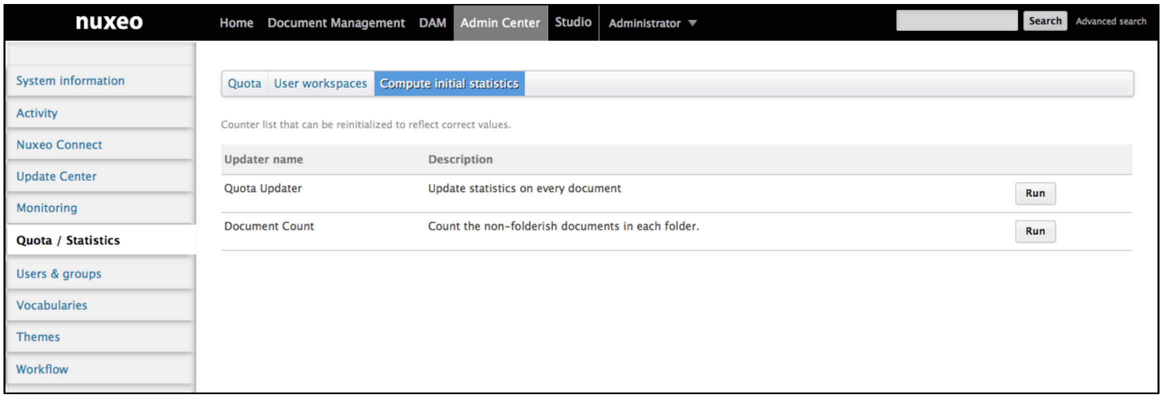
- compute initial statistics to calculate the amount of space used by each item in the application,
- run a job to count the existing documents in the application (prior to this addon being installed). This will display the number of children of each item of the navigation tree,
- enable or disable the maximum size limitation on personal workspaces.

Computing Initial Statistic

Once the package is installed, administrators need to compute initial statistics so that the size of all the documents is calculated.

To compute initial statistics:

1. In the Admin Center, click on the **Quota / Statistics** tab.
2. Click on the **Compute initial statistics** tab.



3. Click on the **Run** button of the **Quota updater** counter.
   The size of all elements in the application is calculated and statistics are updated accordingly.

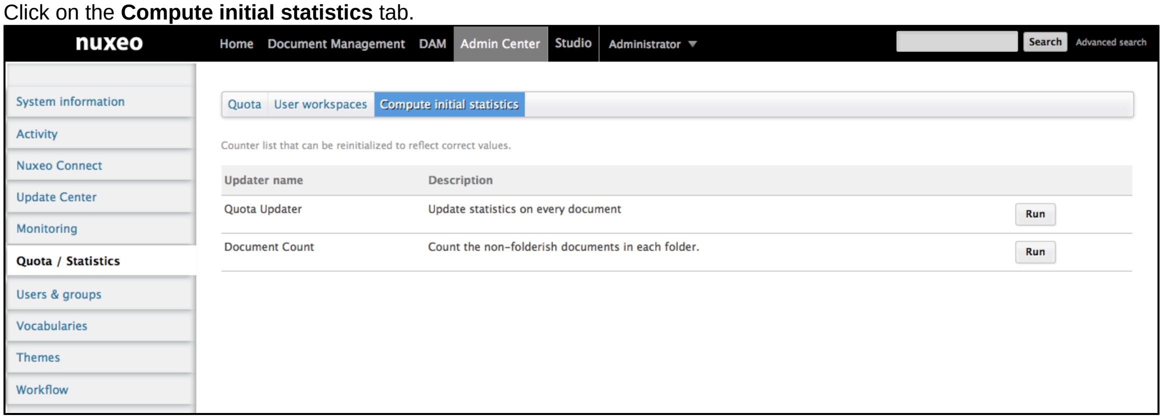
> This initial computation won't prevent users from defining a maximum size allowed (quota) on workspaces, but values may be wrong until initial statistics are actually computed.

Initiating Document Count

When the Quota package is installed on a Nuxeo instance that already has some content, administrators need to initiate the document count. Until they do, the system will ignore existing documents, taking only documents created or edited after the package was installed into account in the navigation tree and displaying inaccurate values.

To initiate the document count:

1. In the Admin Center, click on the **Quota / Statistics** tab.
2. Click on the **Compute initial statistics** tab.



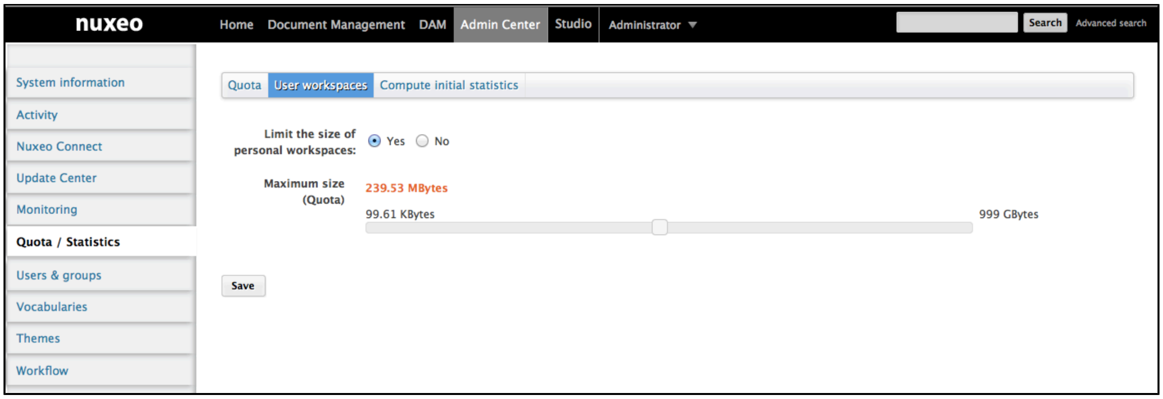
3. Click on the **Run** button of the **Document Count** counter.
   The values in the navigation tree are updated.

Managing Personal Workspace Quotas

By default, there is no quota set on personal workspaces. Administrators can enable it and define globally the maximum size allowed on every personal workspace.

To enable and define the maximum size of personal workspaces:

1. In the Admin Center, click on the **Quota / Statistics** tab.
2. Click on the **User workspaces** tab.



3. If the size limit hasn't been enabled on personal workspaces yet, click the button radio **Yes** (default value is **No**).
4. Move the slider to define the maximum size. This value will apply to every personal workspace.
   The value is displayed on top of the slider.
5. Click on the **Save** button.
   A maximum size is now defined on personal workspaces.

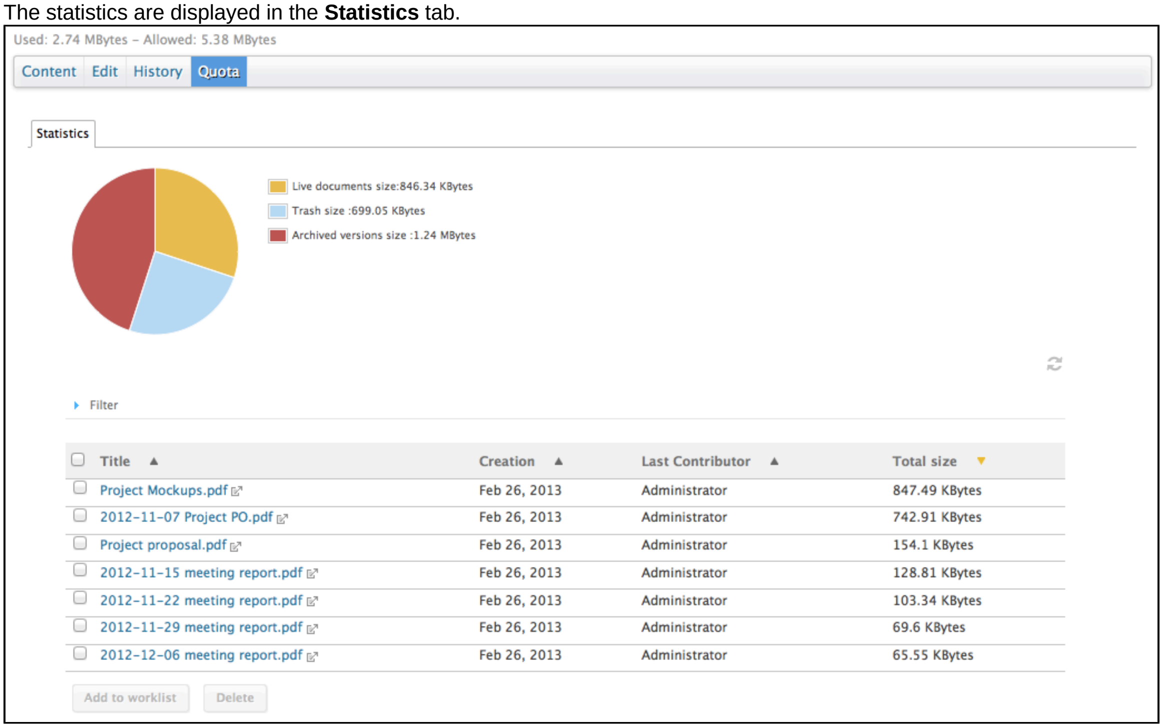
Working With Quotas

Consulting Statistics

Users can see the statistics of a workspace or a domain as soon as they can access it.

To see the statistics of a workspace:

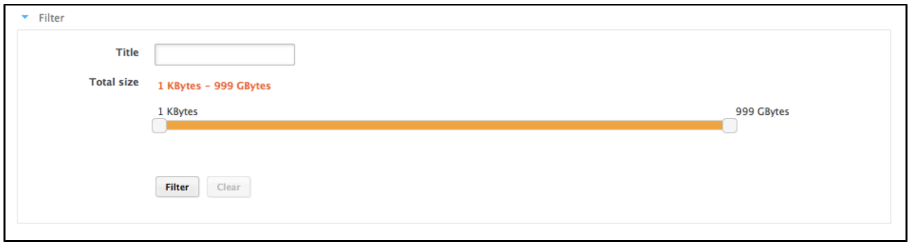
1. On the workspace, click on the **Quota** tab.
   The statistics are displayed in the **Statistics** tab.



   The tab displays:
   - the repartition of the used space between live document, deleted documents and archived versions.
   - the list of the content of the workspace, sorted by size.

   > Only documents larger than 1 KByte are displayed.

2. If needed, filter the list of documents:
   a. Click on the **Filter** link displayed on top of the table.
      The filter form is displayed. By default the whole size range is selected.



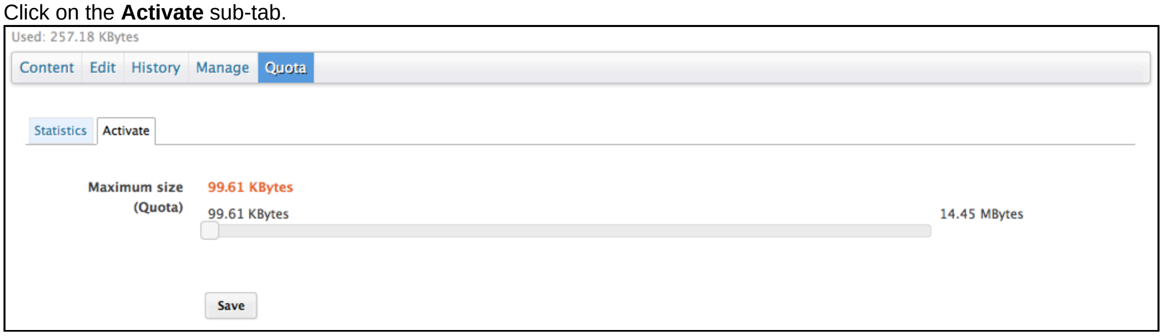
b. Type keywords in the Title field and / or move the slider to define the size range you want to filter on.
c. Click on the **Filter** button.
The list of documents displayed below displays only the documents matching your criteria.

Defining the Size Limit on a Workspace

Only users with Manage everything permission can define the maximum size of a space. By default, the size limit can be defined on domains and workspaces only. It is possible to enable it on other document types using Nuxeo Studio.

To set the maximum allowed size:

1. Click on the **Quota** tab of the workspace (or domain).
   The **Statistics** sub-tab is displayed.
2. Click on the **Activate** sub-tab.



3. Move the slider to set the maximum size in the authorized range:
   - the selected size is displayed on top of the slider;
   - the maximum possible size is the limit size of the parent;

     If the parent has no size limit, the maximum size displayed on the slider is the maximum size of the first parent having a quota defined.

   - the smallest possible maximum size is 99.61 KByte by default, on all spaces.
4. Click on the **Save** button.

You are displayed a message indicating that you need to set a smaller size?
This means other children of the parent imposing the maximum size to be set already have taken some of the available max size on their quotas. You need to choose a smaller value.

When the chosen quota is saved, the value is set and the maximum allowed size is displayed below the workspace's title.

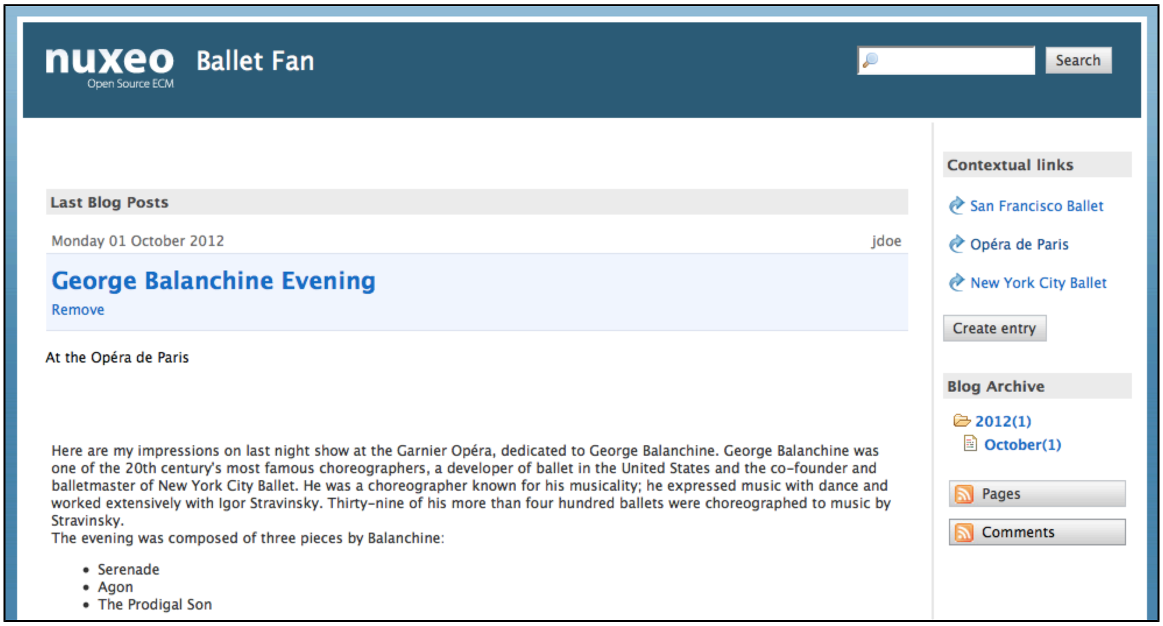
Here is how the maximum size possible is calculated...

When you select a maximum size on a workspace and click on Save, a verification is done to check that the size you selected won't make the parent's quota be exceeded. Here is how it is calculated:

1. The system checks the maximum size set on the parent of your workspace.
   - If no maximum size has been set on the parent, the system goes up the tree until it finds a parent with a defined maximum size (aka "The parent").
2. The system computes the sum of the maximum sizes set on the children of the parent.
   - If a child doesn't have a maximum size set, the system checks its children and makes the sum of their maximum sizes to calculate the parent's.
     This is repeated for all workspaces without maximum size, until the system can calculate a maximum size for each child of "The parent".
3. The system checks that the size you want to set on your workspace is not bigger than the difference between the parent's limit size and the sum of its children's.

Nuxeo Sites and Blogs

The Nuxeo Sites and Blogs package provides two new documents types to the Platform: 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 behaviors, like the fact that they have some specific access rights and that comments can be moderated. Both can also be created in workspaces only.

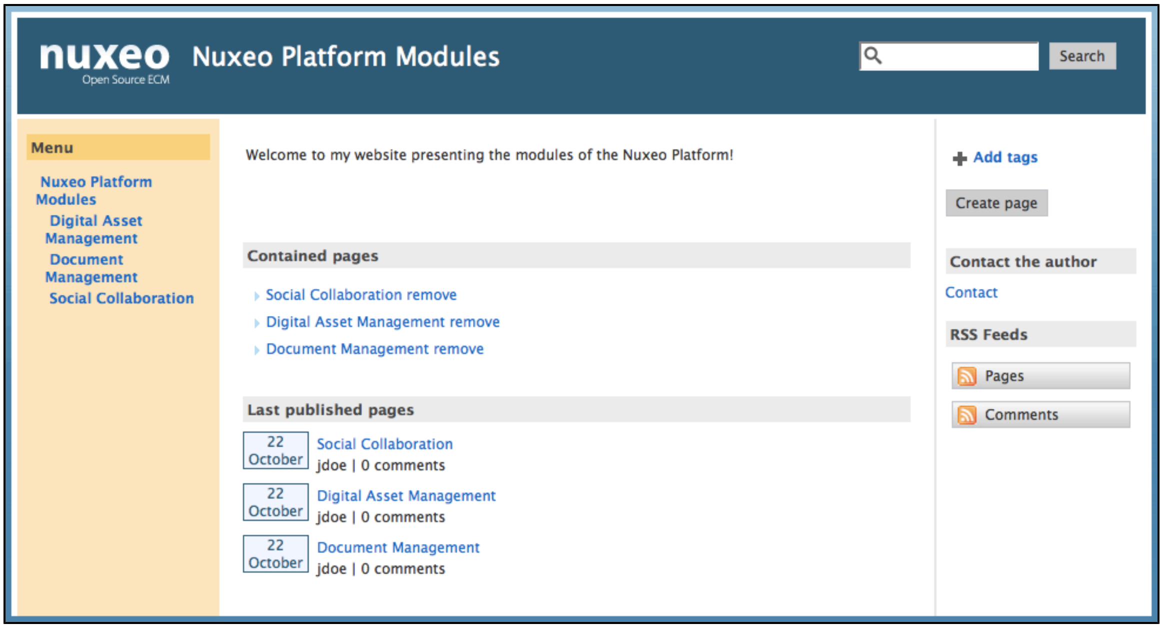
Right	Actions in workspace
Comment	Add comments on websites and blogs.
Moderate	Moderate comments on websites and blogs if moderation is set to "Beforehand".

Related Documentation

- Nuxeo Sites and Blogs dev documentation

Websites

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



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

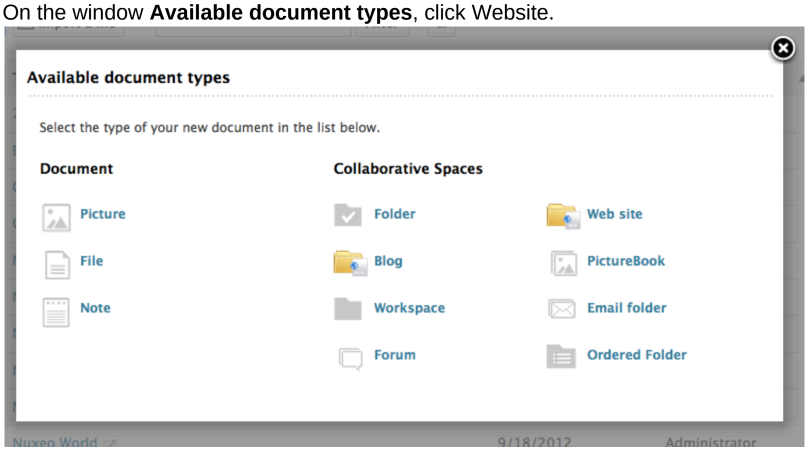
Websites are accessible by a URL formed like http://server:8080/nuxeo/site/sites/site-name. Click on the icon to open the front office view of the website.

Creating a Website

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

To create a website:

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



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

Adding Content to a Website

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

Adding a Webpage

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

To create a webpage:

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

Adding a Contextual Link

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

To create a contextual link:

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

Managing the Access to the Website

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

However, websites have specific access rights:

- Comment
- Moderate

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

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

On this page

Related pages in this documentation

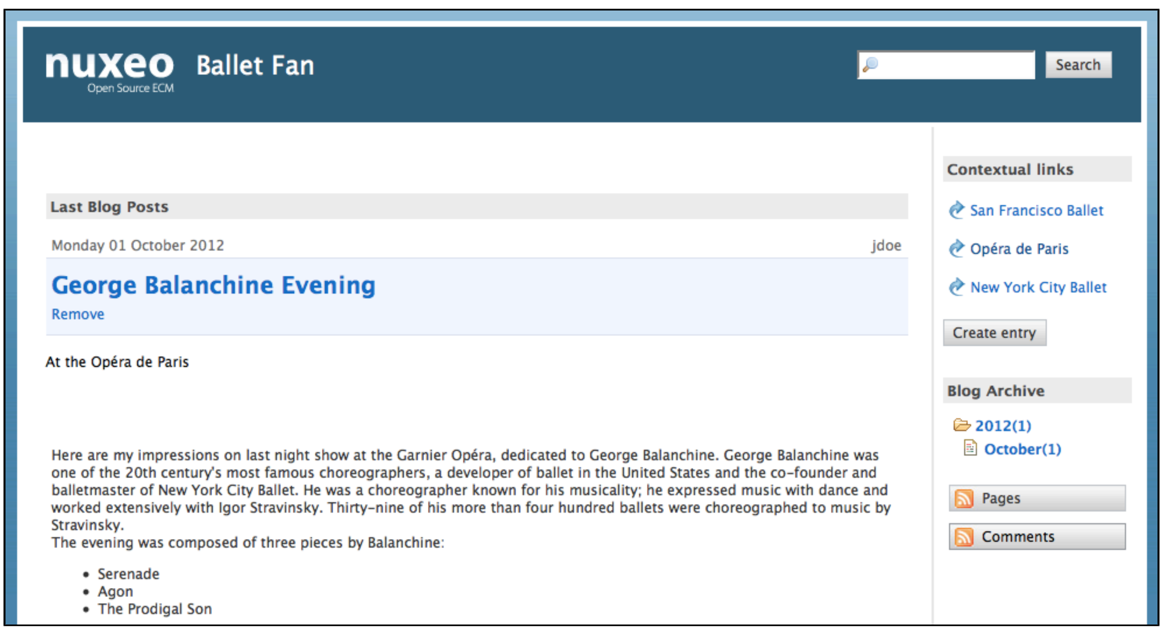
- Nuxeo Sites and Blogs

Related pages in other documentation

- WebEngine (JAX-RS)

Blogs

Along with websites, the Document Management module of the Nuxeo Platform 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.



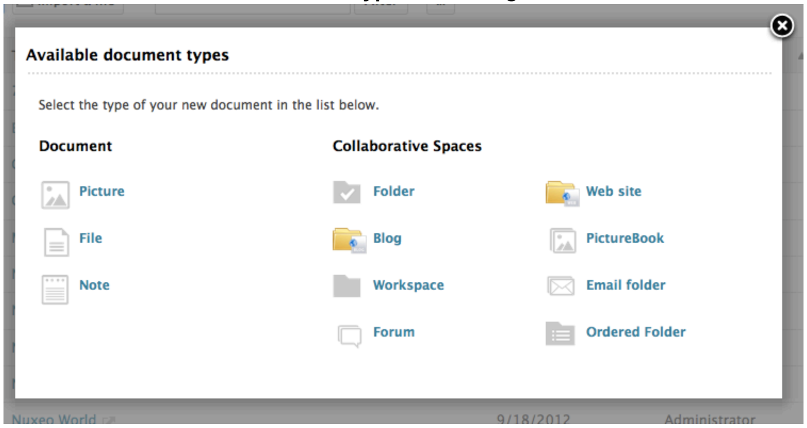
Blogs are accessible by a URL formed like http://server:8080/nuxeo/site/blogs/blog-name. Click on the icon to open the front office view of the blog.

Creating a Blog

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

To create a blog:

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



3. Fill in the blog'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).

Adding Content to Your Blog

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

Adding a Blog Post

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

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

To create a blog post:

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

Adding a Contextual Link

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

To add a contextual link:

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

On this page

Related pages in this documentation

- Nuxeo Sites and Blogs
- Managing Access Rights

Related pages in other documentation

- WebEngine (JAX-RS)

Nuxeo Web Mobile

This Market Place Package provides a WebApp that exposes Nuxeo with a dedicate view for Mobile browser. All Mobile browser will automatically redirected to this application after installation (and restart).

You are welcome to test it and if you install it, you will have no problem to move to next versions, thanks to the market place engine.

This application exposes a subset of Nuxeo DM funconnalities. Here is an overview of what you can do with it:

- Redirection automatically to the Mobile Application for Mobile browsers
- Redirection to the document into the Mobile application when JSF request asked
- Dedicated Login page
- About Document you will have access to different view of this document:** Subset of Metadata
    - Preview
    - Comments
    - Annotation (just the text, not into the preview context)
    - Relation
    - Content (for folderish)
    - The list of contributor to each document. Click on the user will show you their information, especially phone number and mail. You will have the possibility to send email directly to him or call him just clicking on the item.
- You also have some default actions enabled:** Mail it (to send the link to a user into your calendar)

- Download it (Download the file attached)
- Mail me (to ask to the server to send to yourself - using the mail into the Nuxeo account - the File attached and the link to the document)
- Profile view** You have access to all user profile account** Phone number (clickable)
  - Email (clickable)
  - Avatar (can only be set from the desktop browser)
  - Edition of First Name, Last Name, Phone Number, mail.
- You have different kind of browsing. show you his content or if this is a leaf the document view.** Hierarchical: You have a root view that expose the default domain root children and your personnal workspace content. Click on the element will let
  - Search. You have 2 kind of search:*** Full text search - from the Home page and the search view
    - faceted search: you have access to your personnal and shared faceted search recorded. You can't create new faceted search from the mobile application.

This application work on all main mobile browser (Webkits - android, iOS, BB6 -, Fennec Mobile and Windows Phone - we never try for this one, but any feedback are welcome).

About iOS you have also the possibility to add the application into your springboard: Browser button will be hidden and you will have a "feeling" to be into a built-in application.

Here are some screenshots of the application:

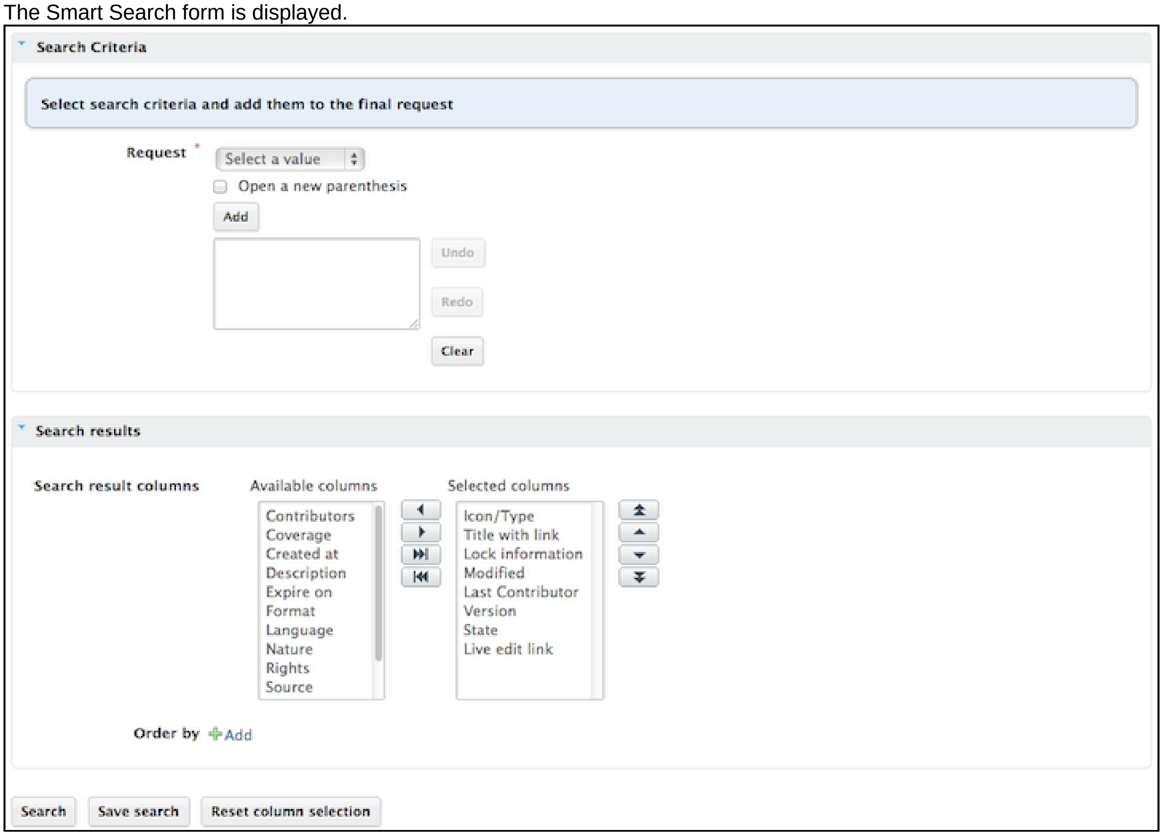
Smart Search

The Smart Search package is a query engine that adds a new search form in the application from which you can build your queries and save them in smart folders. It offers search criteria on content, dates, and metadata.

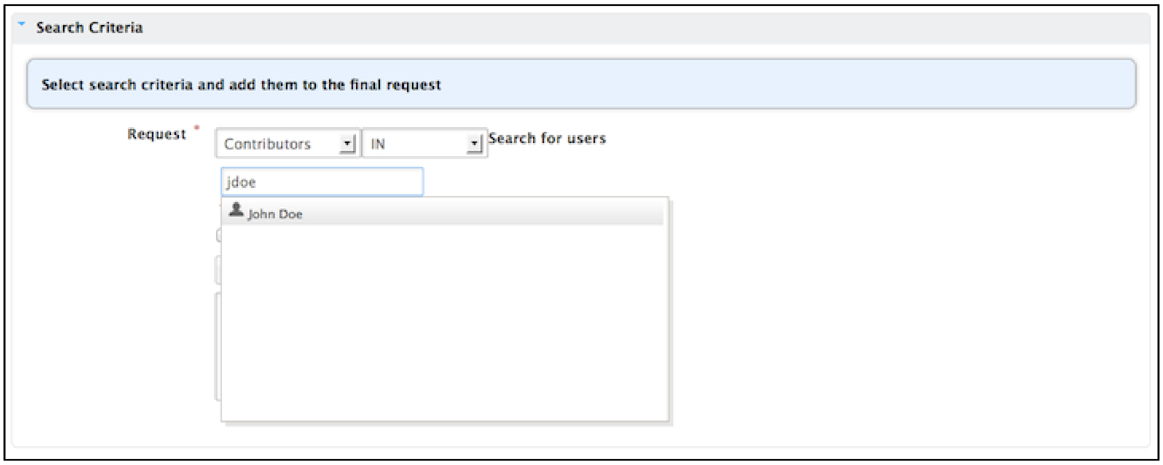
Building a smart search

To build a query using Smart Search:

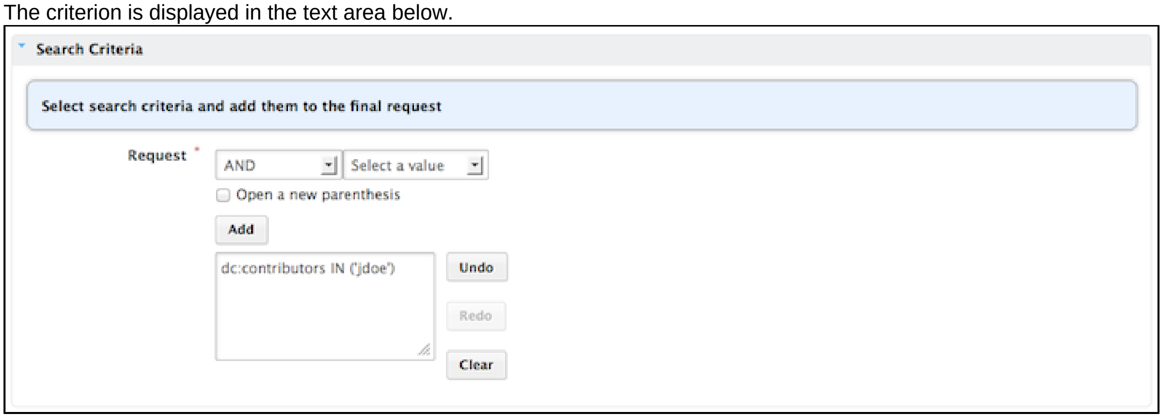
1. Click on the **Smart Search** link displayed next to the default **Advanced Search** link.
   The Smart Search form is displayed.



2. Select a first search criterion in the drop down list and fill in the corresponding field.



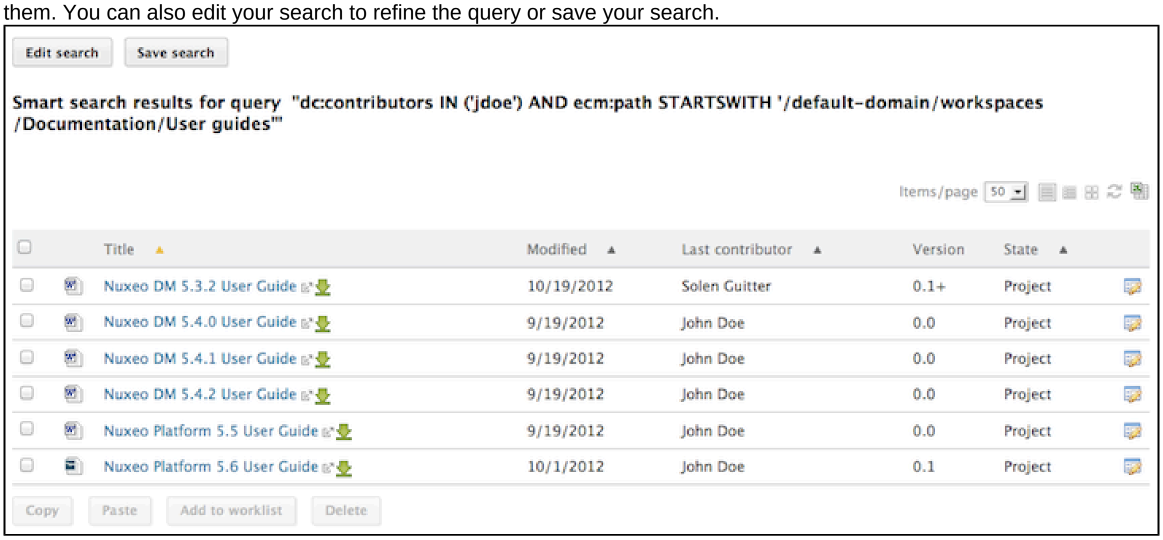
3. Click on the **Add** button.
   The criterion is displayed in the text area below.



4. Possibly, add other criteria.

> You can organize your search criteria in parenthesis.
> You can also use the **Undo** and **Redo** buttons to cancel actions when you build your query.

5. If needed, you can customize the columns of the search results table displayed
   .
6. When your query is ready, click on the **Search** button.
   The search results are displayed. You can click on the documents to consult them. You can also edit your search to refine the query or save your search.



On this page

Saving a smart search

Smart Search enables users to save their search in smart folders. A smart folder is a folder that displays the result of the associated query. Every time a user click on the folder, the query is executed and the content displayed is updated.
Smart folders can be created in workspaces and folders.
There are two ways to create a smart folder:

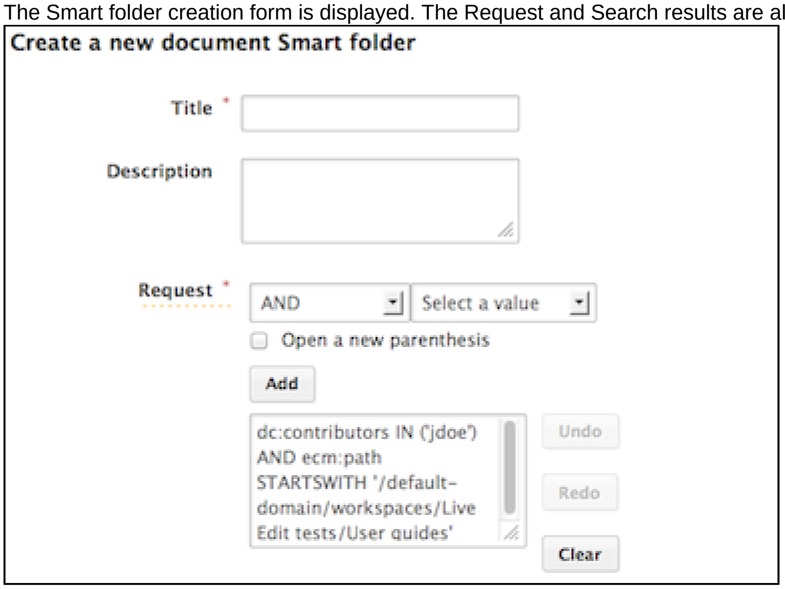
- you can first create your query and save it in your personal workspace,
- or you can create a smart folder directly from a workspace.

> Access rights cannot be managed on smart folders. If you want to share a smart search, you need to save it in a workspace or a folder that is shared with other users.

Saving a smart search

You can save a smart search from the search form directly or from the search results. When you save a smart search, it is automatically saved in your personal workspace.

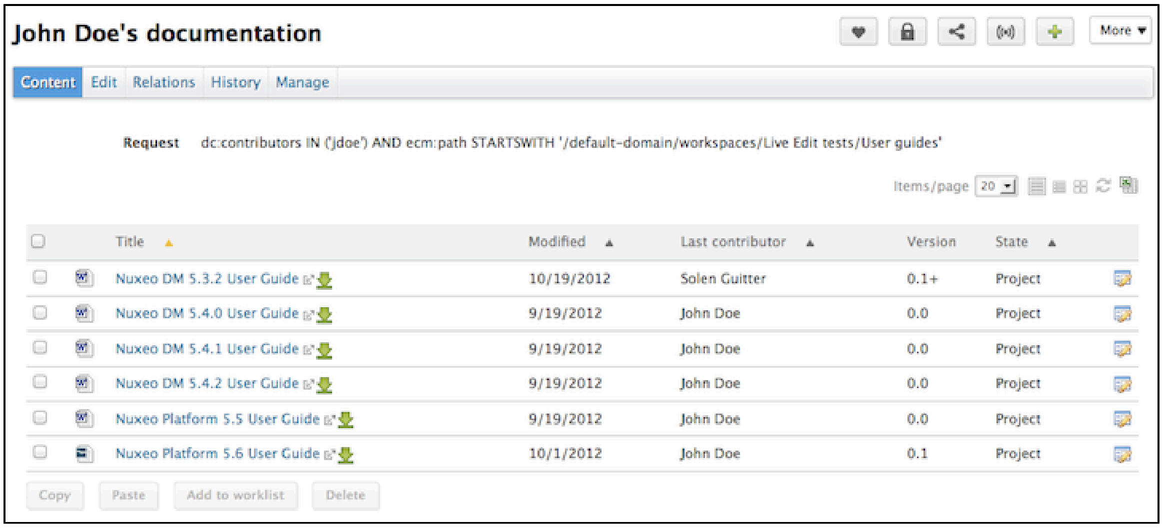
To save a search in a smart folder:

1. Build your query.
2. From the search result page or from the search form, click on the **Save search** button.
   The Smart folder creation form is displayed. The Request and Search results are already filled in with your search configuration.
   

3. Give the smart folder a title, optionally a description.
4. Click on the **Create**button to save the smart folder and display its content.

   > You can click on the **Create and go back to smart search** button to save the smart folder and go back to the smart search form to start creating other requests.

   The smart folder is saved in your personal workspace.



Creating a smart folder

You can create a smart search in a workspace or in a folder.

To create a smart folder:
You can create a smart folder and then build the query that will be associated to it:

1. In a workspace, click on **New**.
2. In the modal window, click on **Smart folder**.
3. On the creation form, type a title, a description (optional) and build your query.
4. Click on the **Create** button to save the smart folder and display its content.
   The smart folder is saved.

Smart search operators

Smart search enables to build queries using the fields and operators below.

Metadata	Search field	Operator
Content	Text field	LIKE
Contributors	User search	IN NOT IN
Coverage	Vocabulary	IN EQUALS LIKE CONTAINS NOT IN IS DIFFERENT FROM NOT LIKE DOES NOT CONTAIN
Created at Expire on Last modified at	Calendar	BETWEEN NOT BETWEEN GREATER LESS

Description Format Language Rights Source Title	Text field	EQUALS LIKE CONTAINS IS DIFFERENT FROM NOT LIKE DOES NOT CONTAIN
Nature Subjects	Vocabulary	IN NOT IN
Path	Text field + Browse option	STARTS WITH DOES NOT START WITH

Date fields

- BETWEEN: Doesn't include the selected dates.
  Example: a search on documents last modified BETWEEN the 10/27/11 and 01/30/12 (Query: `dc:modified BETWEEN DATE '2011-10-27' AND DATE '2012-01-31'`) will return the documents modified between the 10/28/11 00:00 and 01/29/12 23:59.
- NOT BETWEEN: Doesn't include the selected dates.
  Example: a search on documents last modified NOT BETWEEN the 10/27/11 and 01/30/12 (Query: `dc:modified NOT BETWEEN DATE '2011-10-27' AND DATE '2012-01-31'`) will return the documents modified until the 10/26/11 23:59 and from the 01/31/12 00:00.
- GREATER: Searches for documents whose selected date type (creation, modification...) is more recent than the selected one. Selected date is not included.
  Example: A search on documents with a "Created at" date GREATER than 10/27/11 will return all the documents created from the 10/28/11 00:00.
- LESS: Searches for documents whose selected date type (creation, modification...) is older than the selected one. Selected date is not included.
  Example: A search on documents with a "Created at" date LESS than 10/27/11 will return all the documents created until the 10/26/11 23:59.

Vocabulary and text fields

- IN: Searches for documents that hold the selected value(s).
  Example: A search for documents whose "Nature" is IN "invoice" will return all the documents that "Invoice" selected as their nature.
- NOT IN: Searches for documents that hold a value different from the one(s) selected.
  Example: A search for documents whose "Nature" is NOT IN "invoice" will return all the documents that have any other nature value than "invoice". Documents for which the nature hasn't been filled in are ignored.
- LIKE: On the "Content" field, performs a fulltext search. Full text search uses stemming. The stemming search option will return the documents containing words that have the same stem as the word you typed. On other fields, it performs an EQUALS search, but can be associated with the % wild card. LIKE search is case-insensitive on Content field, and case-sensitive on other fields.
  Examples: A search on the content on the word "Reading" will return documents containing in their content "Read", "reads" etc. A search on a "title" LIKE "Function%" will return documents whose title starts with Function, Functional, Functions.
- NOT LIKE: On the "Content" field, performs a fulltext search. Full text search uses stemming. In this case, the stemming search option will return the assets that don't contain words that have the same stem as the word you typed. On other fields, it performs an IS DIFFERENT FROM search, but can be associated with the % wild card. NOT LIKE search is case-insensitive on Content field, and case-sensitive on other fields.
  Examples: A search on the content on the word "Reading" will return documents that don't contain in their content "Read", "reads" etc. A search on a "title" NOT LIKE "Function%" will return documents whose title don't start with Function, Functional, Functions. In general, the NOT LIKE operator is used in association with another search (LIKE for instance), to restrain the search results.
- CONTAINS: Searches for the typed or selected string of characters, preceded or followed by any character. In other words, it can be used to look for properties where stemming cannot be applied, such as IDs.
  Example: A search for a "source" that CONTAINS "http" or "www" can be used to look for documents that have a web resource as their source.
- DOES NOT CONTAIN: Searches for any string of character but the one typed, preceded or followed by any character. In other words, it can be used to look for properties where stemming cannot be applied, such as IDs.
  Example: A search for a "source" that DOES NOT CONTAIN "http" or "www" ca be used to look for documents that don't have a web resource as their source.

- EQUALS: Searches for the exact same string of characters as what is typed or selected. EQUALS search is case-sensitive and empty values are ignored.
  Example: A search for a title EQUALS to "My document" will return the documents whose title is "My document" but not documents whose title is "my document" or documents holding "document" in their title.

- IS DIFFERENT FROM: Searches for strings of characters different from the one selected or typed. IS DIFFERENT FROM search is case-sensitive and empty values are ignored.
  Example: A search for documents whose coverage IS DIFFERENT FROM "Europe > France" will return all the documents that have a coverage filled in, except those who have the value "Europe > France".

- STARTS WITH: Searches for all the children of the selected folder.
  Example: A search for the documents in the workspace "Invoices" will return all the documents that are in this workspaces, including possible sub-workspaces.

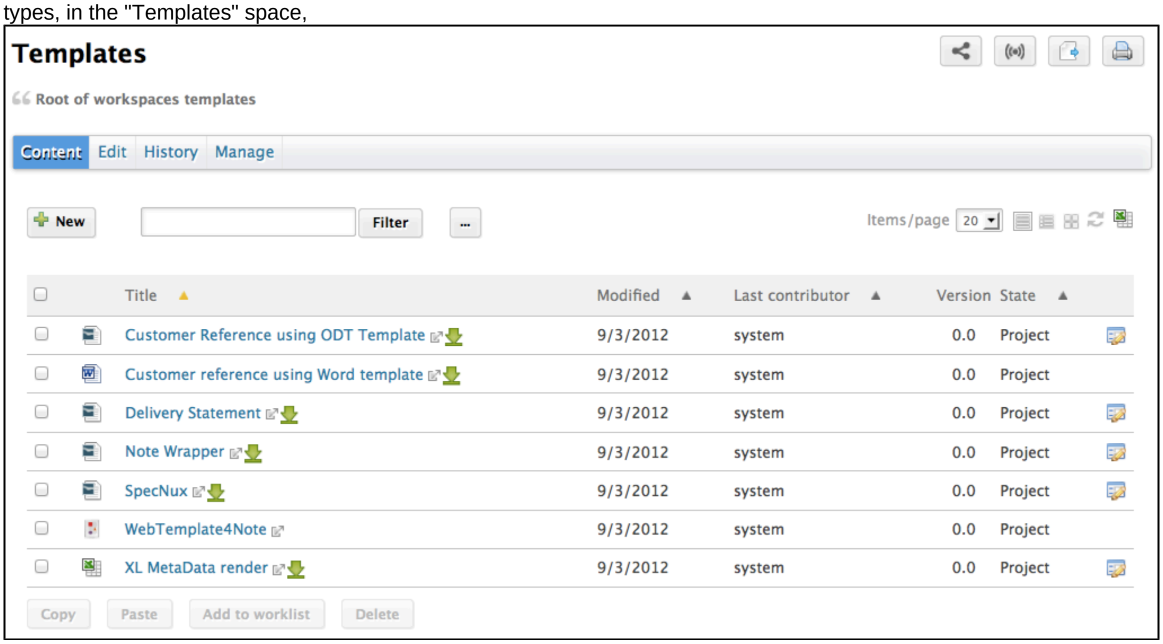
- DOES NOT START WITH: Searches for all the documents in the application except those in the selected folder.
  Example: A search for documents that are not in the Invoice workspace will return the documents in all the other workspaces (including sub-workspaces and their content), in templates, in sections and in other domains if there are any.

Template Rendering Addon

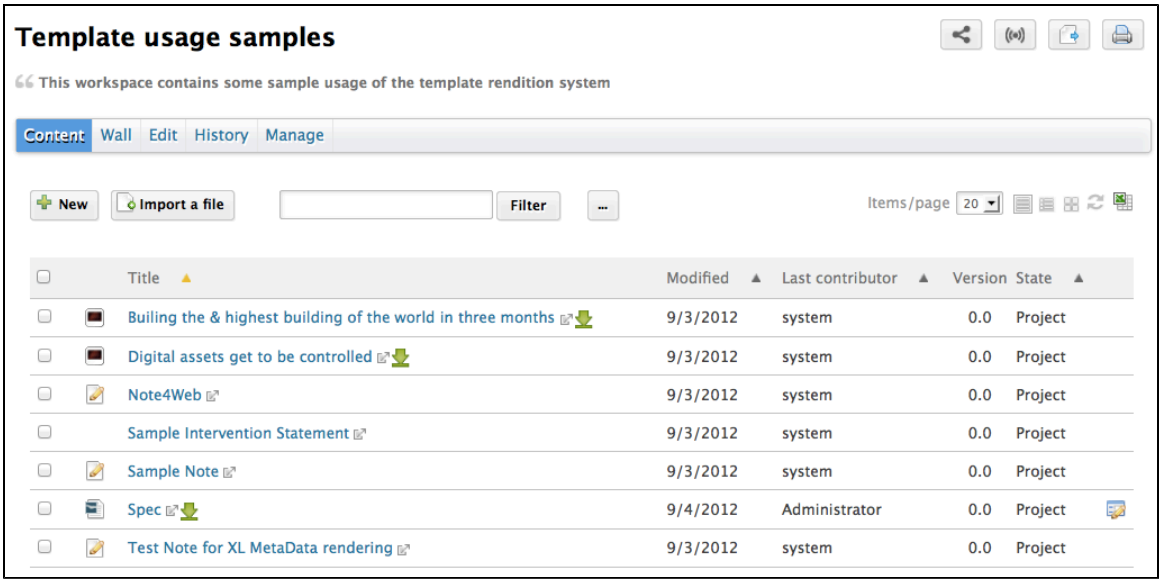
> ⚠ This addon is currently not supported on the development version of the Nuxeo Platform.

The template rendering addon is an addon available from the Nuxeo Marketplace that enables users to create documents from a template, with content being automatically extracted from Nuxeo, and to have an automated rendering generated from a set of user-defined preferences. This addon includes:

- four new document types:
  - two template document types, called "Template" and "Web template",
  - two file-based document types, called "Customer reference" and "Statement reference" and configured using Nuxeo Online Services,
- templates with template attachments, leveraging the Template and Web Template document types, in the "Templates" space,



- documents based on these templates, showing the result of the different template rendering options, in the "Template usage samples" workspace.



On this page:

The principle of the template rendering feature is the following:

1. A template file (Word file, OpenOffice.org file, ...) is created outside Nuxeo. This file holds some fields that will automatically be filled in with content defined in Nuxeo.
2. A Nuxeo user creates a Nuxeo template, to which he attaches the template file (or fills in the Note content in case of a web template). He fills in the template properties, that will define under which conditions the template is available: for which document types, under which circumstances...
3. When users in Nuxeo create a new document for which a template is available, they can use it. If some template elements are left to be edited or filled in by the document's contributors, they can set them.

There are two types of Nuxeo templates: the "Template" will have an attached file in which some values are defined to be Nuxeo values. The "Web template" doesn't have an attachment. Its content is defined in a Note field.

Creating a template file

The template file is the file that will be used to generate the rendering of the Nuxeo document and will be completed automatically with the defined Nuxeo properties. This template file can be:

- an office document (.doc, .docx, .odt, .xls, .xlsx, .ods formats are supported for now),
- an HTML file,
- a XML file.

To create a template file:

1. Create a regular office, HTML or XML file with your favorite tool.
2. In the document, put variables where you want to use information from Nuxeo (see below). You may want to use XDocReport for this part.
3. When the template is ready, create the template document in Nuxeo and attach the template to it.

Here are a few examples of the most common variables:

- `${doc.title}`: gets the title of the Nuxeo document
- `${doc['dc:description']}`: gets the content of the Description field of the Nuxeo document
- `${doc['dc:modified']}`: gets the last modification date of the Nuxeo document. You can define how the date should be formatted by adding `?date` to display only the date, or `?time` to display only the time. By default, the modification date displays both the date and the time.
- `${doc.versionLabel}`: displays the version number
- `${auditEntries.eventId}`: displays the events listed in the document's history. `${auditEntries.eventDate}` displays the date at which the events took place, `${auditEntries.principalName}` the name of the user who did the action, `${auditEntries.comment}` the comment typed by the user.

More resources to help users create the template file

- More information about the variables available (including functions) in the Quick user guide on the Nuxeo GitHub repository.
- XDocReport overview and user guide: XDocReport is a tool that enables to insert fields in MS Office and OpenOffice.org.
- Template rendering readme file on the Nuxeo GitHub repository
- Template rendering Quick User Guide on the Nuxeo GitHub repository

Creating the template document

When the template file is done, you need to create a template document and attach the template file to it.
Templates can be created in the Templates space, in workspaces and in folders.

To create a template document:

1. In the **Content** tab of the workspace or template space, click on the **New Document** button.
2. On the window **Available document types**, click on the desired document.
3. Fill in the template document's creation form (see below for template's properties).
4. Click on the **Create** button.
   The **Summary** tab of the template document is displayed.
   You can now create documents based on this template.

Template properties

Field	Description
Title	Type the template title
Description	What the template is about
Content	• For a Template : the attached template file (odt, doc, etc file). • For a web template: The Note that will hold the content of the template. Typically this would be HTML text.
Simple mode	
Template usage	Select what the template will be used for: • Office template: • Office template with PDF rendering: • Create a rendition:
Advanced mode	
Nature	Select which nature will the document based on the template automatically get.
Document types for which the template is available	Select the document types for which this template will be suggested.
Allow parameters override	Check if the user should be able to change the parameters defined here.
Template processor	Select how are the template file fields processed to use Nuxeo data. Automatic should work for most file formats.
Rendition	Select the views that will be available for the template.
Document types automatically associated to template	Select the document types for which the template file will automatically be attached.
Template is editable on the document (office template)	If checked, the user will be able to ?
Rendering output format	Select what is the format of the selected rendition going to be.

Using template documents

A document can use one or several templates. If it is associated with several templates, the first template associated is considered as the main template and is used as content. The other associated templates are used to generate additional renditions of the document.
When a document is using a template, an additional tab is available on the document, called **Associated templates**.
There are several ways to associate a template to a document.

Creating a document based on a template

To create a new document based on a template, users need to use the **New document** button. If a template is available for the selected document type, an additional option is then available for the **Content** field, allowing users to select which template to use.

When the document is created, the template is used as content. An additional **Associated templates** tab is available.

Users can then:

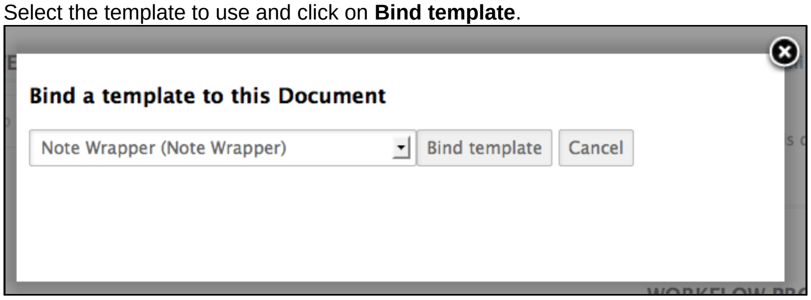
- associate other templates to the document,
- render the document using the template(s),
- publish the document using the template's available renditions.

Associating a template to a document

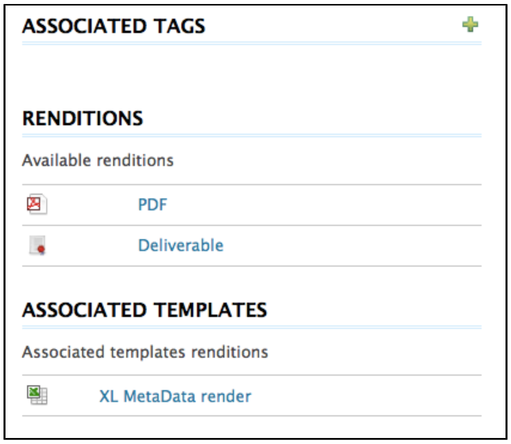
It is possible to associate a document with a template after the document's creation.

To associate a document to a template:

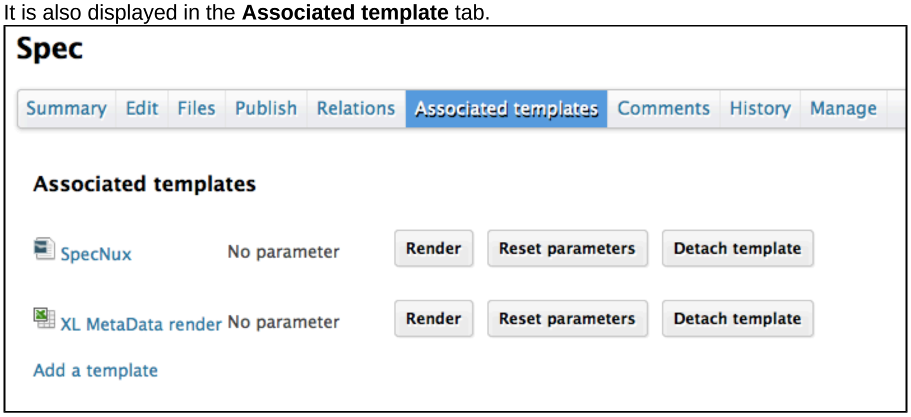
- If the document has no template associated yet:
  1. Click on the icon .
  2. Select the template to use and click on **Bind template**.



- If the document already has at least one associated template:
  1. Click on the **Associated templates** tab.
  2. Click on the link **Add a template**.
  3. Select the new template to associate with the document and click on the button **Bind template**.
     The Summary tab is displayed. The added template is displayed in the **Associated templates** section of the **Summary** tab.



It is also displayed in the **Associated template** tab.



Rendering a document using its template

When a document has one or several templates associated, it is possible to view or download the document using the rendition(s) defined by the templates. The available renditions depend on the template you chose to use.

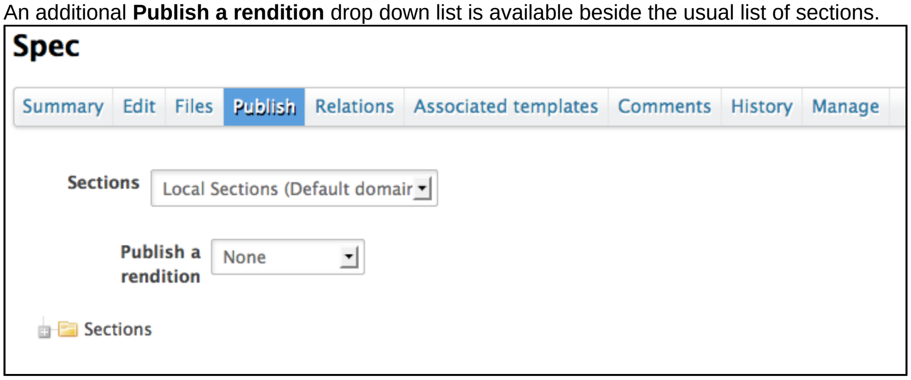
To view the document using a rendition, click on the corresponding rendition in the **Renditions** of the **Summary** tab.

Publishing a document's rendition

The Template rendering addon enables to publish a rendition of the document instead of the document itself, as it is the case on a default Platform configuration. Typically, it enables to publish the PDF rendition of an office document.

To publish a rendition of a document:

1. Click on the **Publish** tab of the document.
   An additional **Publish a rendition** drop down list is available beside the usual list of sections.

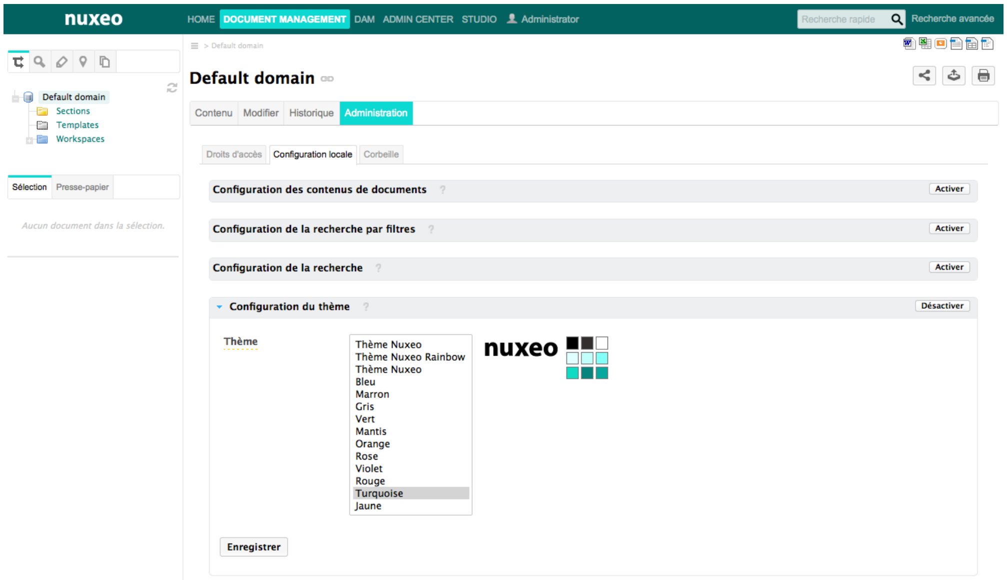
   

2. In the **Publish a rendition** drop down list, select the rendition you want to publish.
3. Unfold the sections tree and click on the **Publish here** link corresponding to the section you want to publish the document in.
   The document's rendition is submitted to publishing and must approved using the usual publishing process.

Unicolor Flavors Set

This Unicolor Flavors Set package lists a set of flavors that customizes the colors of your workspaces, sections or any space on your Nuxeo application.

Available colors are Blue, Brown, Gray, Green, Mantis, Orange, Pink, Purple, Red, Turquoise and Yellow. Here is an example of the Turquoise flavor:



To use the Unicolor Flavor Set, you should report to the workspace theme configuration.

Related Documentation
• Unicolor Flavors Set dev documentation

Nuxeo Shared Bookmarks

The Nuxeo Shared Bookmarks addon enables users to bookmark documents and organize their bookmarks in folders. They can thus organize existing documents in a new tree structure without duplicating content.

The Nuxeo Shared Bookmarks addon provides new document type to the Nuxeo Platform, called shared bookmark, in which users can create folders and bookmark documents.

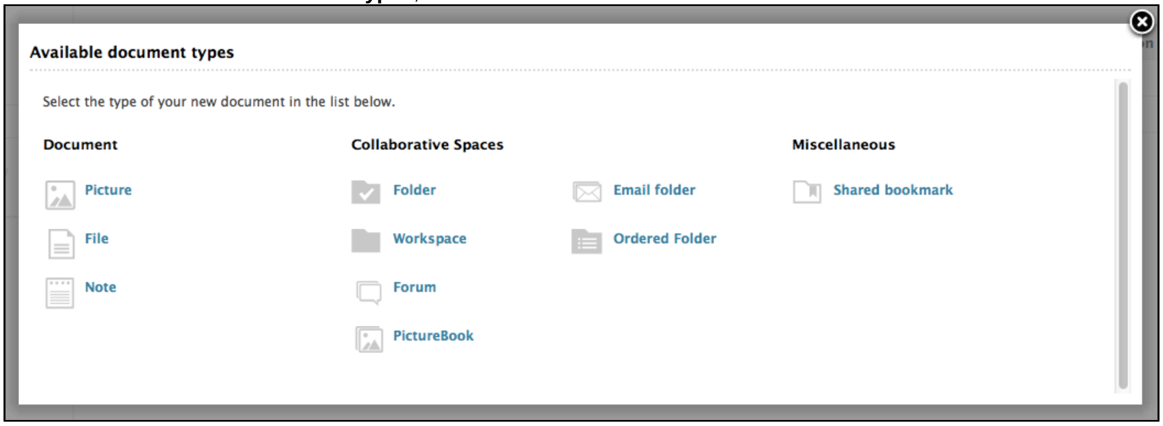
Bookmarking a document doesn't mean copying it in a folder. It displays a link to the document from the bookmark the folder, but the document only exist once, in its original workspace or folder.

In this section

Creating Shared Bookmarks

Shared bookmarks can be created in workspaces and folders.

1. In the **Content** tab of the workspace, click on the **New** 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 Shared bookmark's Content tab is displayed. You can now bookmark documents in it or create folders to organize your bookmarks.

Bookmarking Documents

By default, you can bookmark notes, files and pictures. You need to have one of the following rights in the target bookmark folder to be able to bookmark:

- Manage everything,
- Bookmark.

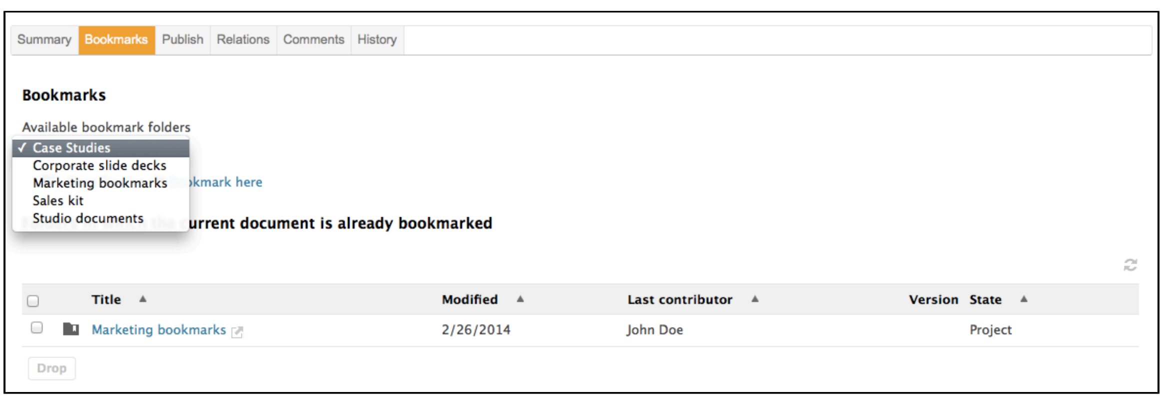
Bookmarking a Document from the Document

Documents have an additional tab called Bookmarks. This tab enables users to bookmark the document in a bookmark folder, but also to see where the document is already bookmarked.

To bookmark a document from its Bookmarks tab:

1. Click on the **Bookmarks** tab.
2. In the Available bookmarks folder drop-down list, select the folder where you want to bookmark the document.

> The list of bookmarks folder is displayed independently from its structure. They are sorted alphabetically.



3. Click on the **Bookmark here** link corresponding to the folder where you want to bookmark the document.
   The document is now available from the selected bookmark folder. The selected folder is now displayed in the "Folders in which the current document is already bookmarked" section of the **Bookmark** tab.
   The action is tracked in both the document and the bookmark folder histories.

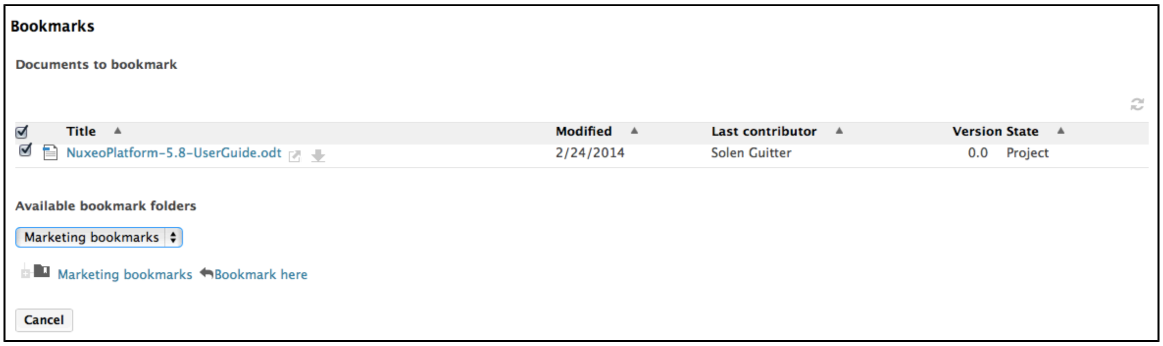
Bookmarking a Document from the Workspace

The Nuxeo Shared Bookmarks addon adds **Bookmark** button in the **Content** tab of workspaces and folders. You can then bookmark one or several documents from this view.

To bookmark a document from the workspace Content tab:

1. Select the document(s) to bookmark using the check boxes.
2. Click on the **Bookmark** button.
3. In the Available bookmarks folder drop-down list, select the folder where you want to bookmark the document.

   The list of bookmarks folder is displayed independently from its structure. They are sorted alphabetically.

4. Click on the **Bookmark here** link corresponding to the folder where you want to bookmark the document.
   The document is now available from the selected bookmark folder. The action is tracked in both the document and the bookmark folder histories.

Sharing Bookmarks

You can either want to grant access to the bookmark folder or enable users to bookmark additional documents in that folder.

- To grant access to the bookmark folder, you need to give Read right to users.
- To enable users to bookmark documents in the folder, you need to give them the Bookmark right in the folder. By default, only users with Manage everything right can bookmark documents in a bookmark folder.

See the page Managing Access Rights.

Related Documentation

- Nuxeo Shared Bookmarks dev documentation

Nuxeo RSS Reader

Nuxeo RSS Reader is a Nuxeo add-on which provides an OpenSocial gadget displaying RSS feeds.

It enables users to display the latest news of their favorite newspapers on their home page.

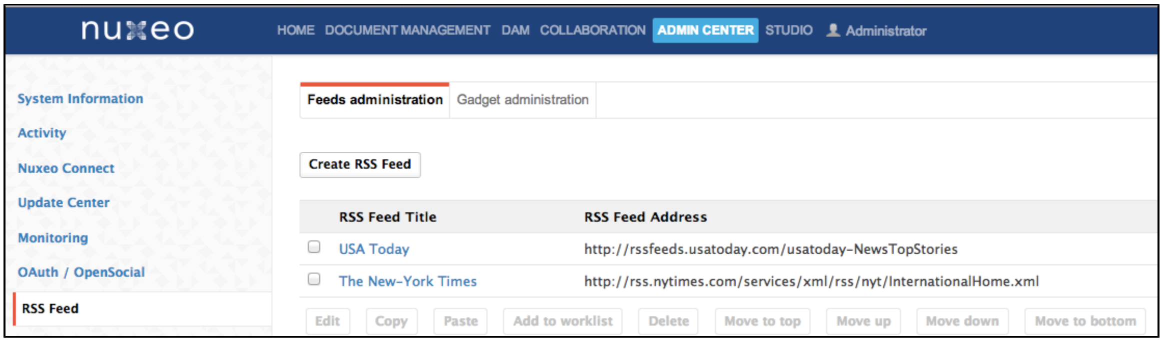
In order to be able to download and to use RSS Reader correctly, you need to install the Nuxeo Document Management module.

Configuring Available RSS Feeds

As an admin user you can predefine a list of RSS feeds for final users in order to propose a user-friendly list of choices.

Adding a RSS Feed

1. From the RSS Feed tab in the Admin Center, click on **Create RSS Feed**.
2. Fill in the page with the title and the RSS Feed address.
3. Click on **Create**.
   The RSS feed is added to the list.



In this section:

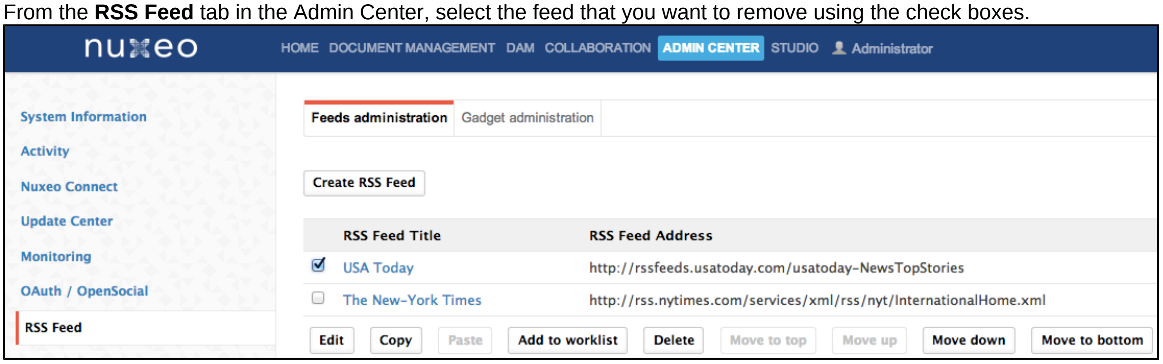
Managing the RSS Feeds

Once your list of feeds is created, you can decide which news you want to display first.

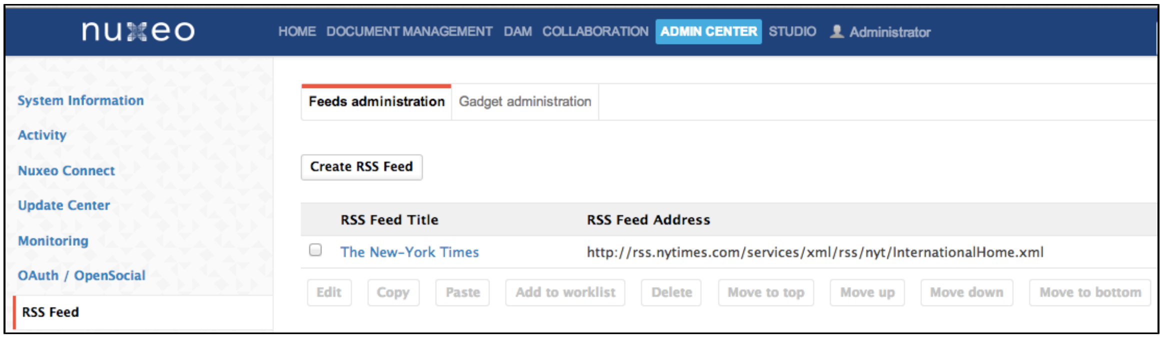
1. Select the RSS feed that you want to move using the check boxes on the documents list.
2. Click on **Move to top** or **Move to bottom.**

Removing a RSS Feed

1. From the **RSS Feed** tab in the Admin Center, select the feed that you want to remove using the check boxes.



2. Click on **Delete**.
   A window appears.
3. Click on **OK** to confirm.
   The feed is deleted.

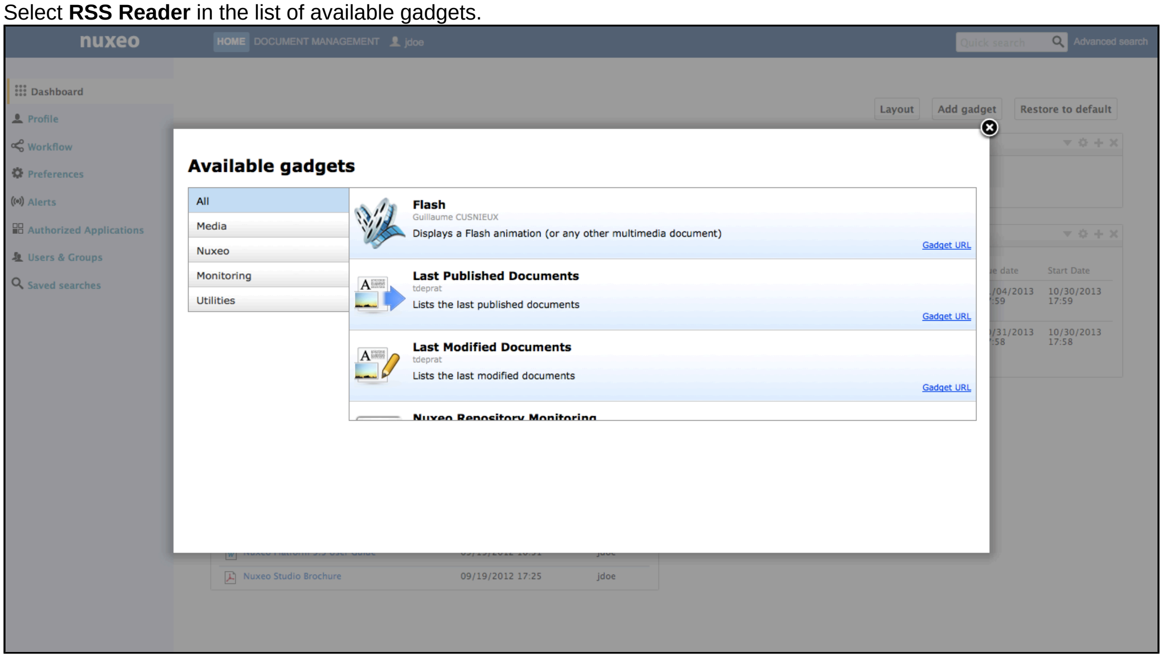


Using RSS Feeds on Your Dashboard

Even if you are not an admin user, you can manage your RSS feeds.

Adding the RSS Reader Gadget

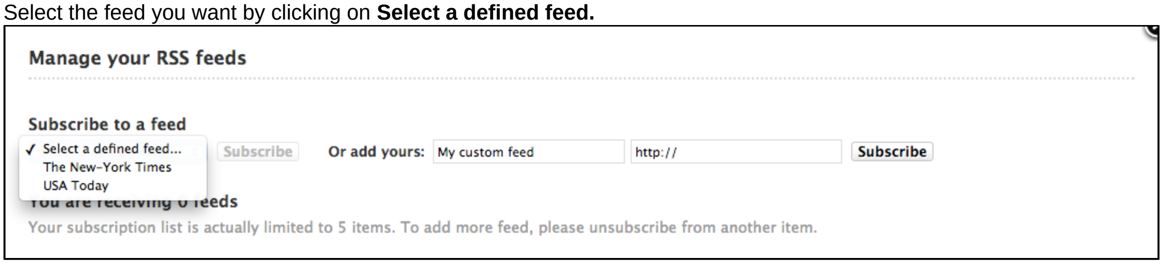
1. From your home page, click on **Add gadget**.
2. Select **RSS Reader** in the list of available gadgets.



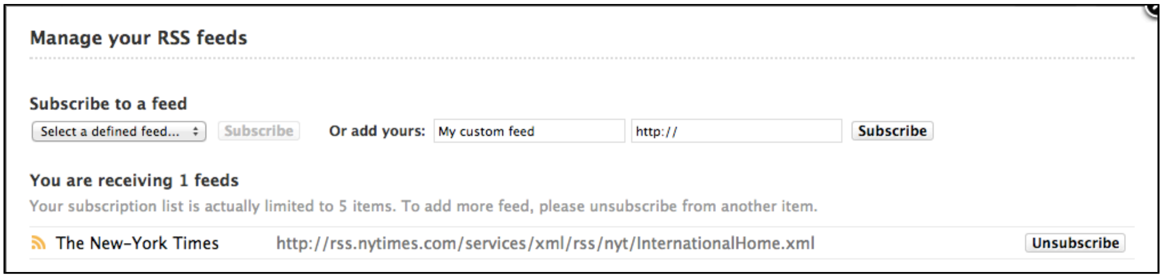
The gadget appears on your home page.

Using the Defined RSS Feeds

1. Click on **Settings** in the RSS Reader gadget.
2. Select the feed you want by clicking on **Select a defined feed.**



3. Click on **Subscribe** to confirm.
   The feed appears in the list of feeds received.

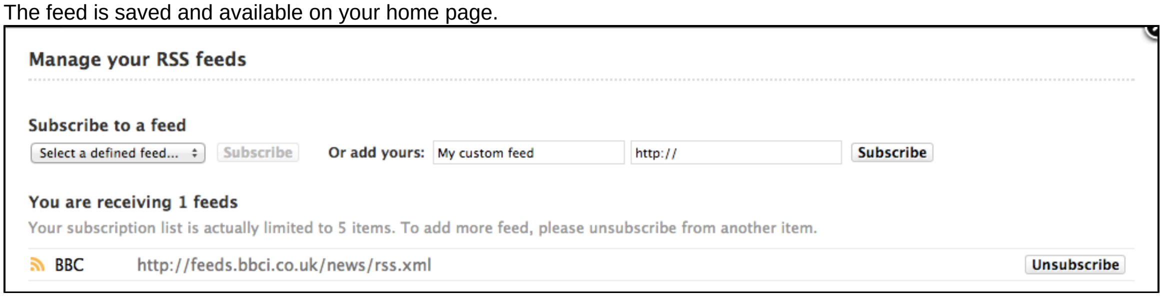


Creating a New RSS Feed

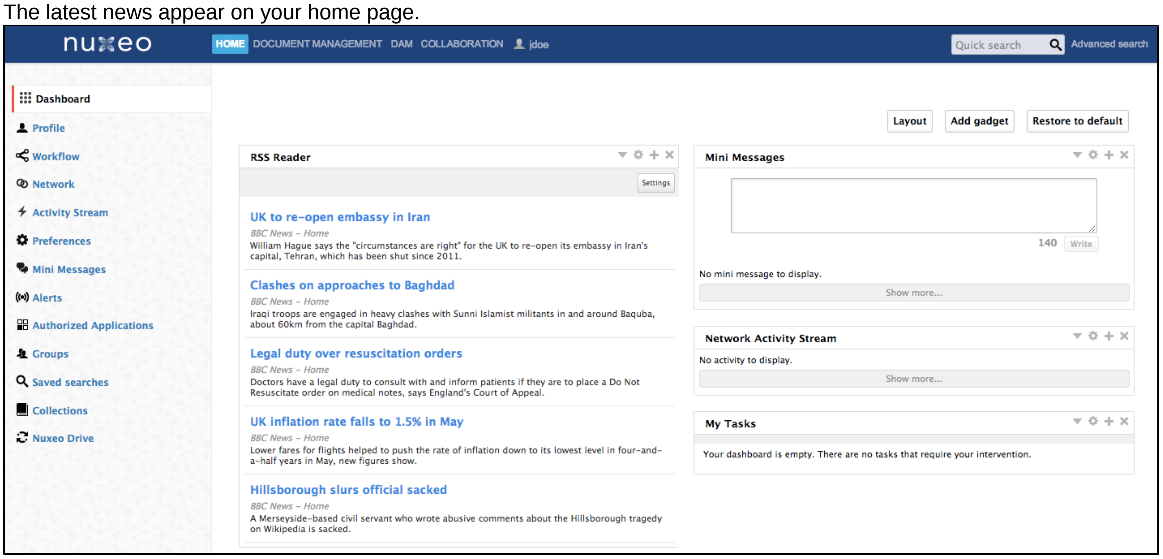
If the feed you want is not already defined, you can add it by yourself.

1. Click on **Settings** in the RSS Reader gadget.
2. Enter the RSS address of the feed and give it a title.

3. Click on **Subscribe** to confirm.
   The feed is saved and available on your home page.

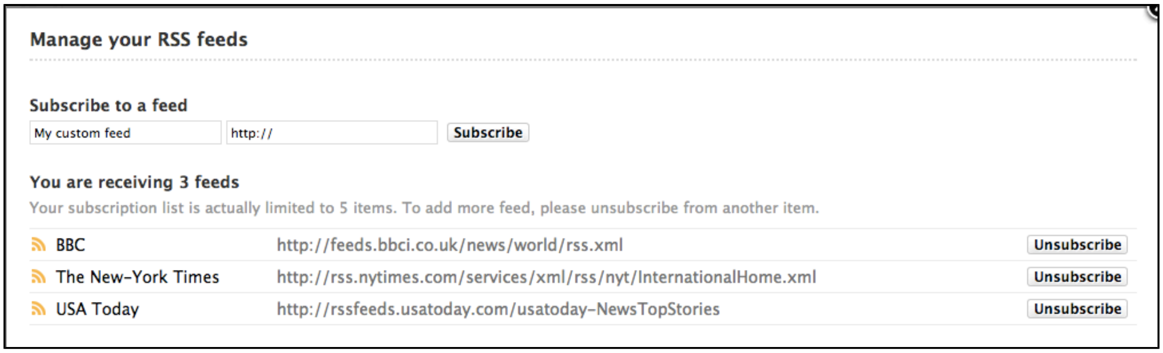


4. Close the settings window.
   The latest news appear on your home page.

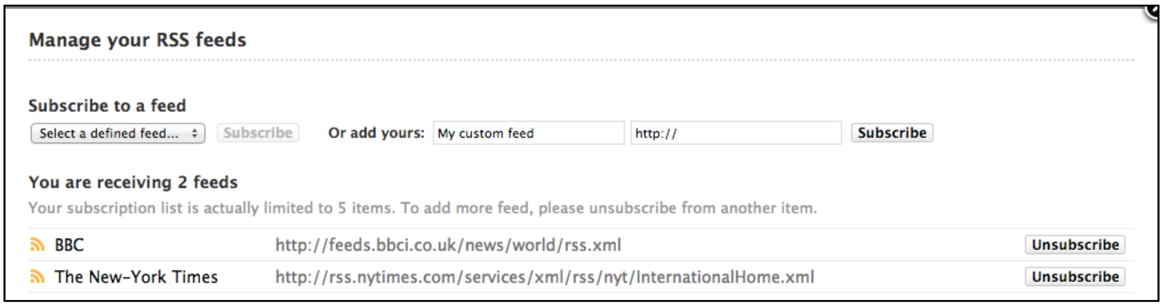


Removing a RSS Feed

1. Click on **Settings** in the RSS Reader gadget.
2. Click on **Unsubscribe** next to the feed that you want to delete.



3. Click on **OK** to confirm.
   The feed is deleted.



Related Documentation

- Nuxeo RSS Reader dev documentation

Nuxeo DuoWeb Two-Factor Authentication

The Nuxeo addon nuxeo-duoweb-authentication is an integration of DuoWeb access in Nuxeo login plug-in and provides two factors authentication through the Nuxeo login page.

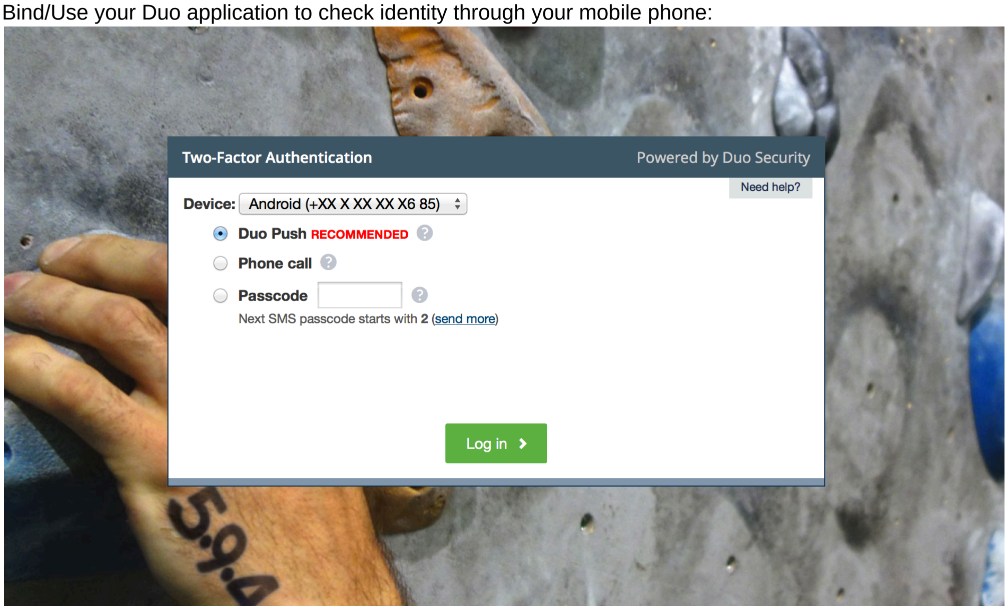
This plug-in is available for Nuxeo Platform 5.8 and above.

> **Configuration**
> Please refer to this README to configure and activate the add-on on your Nuxeo instance.

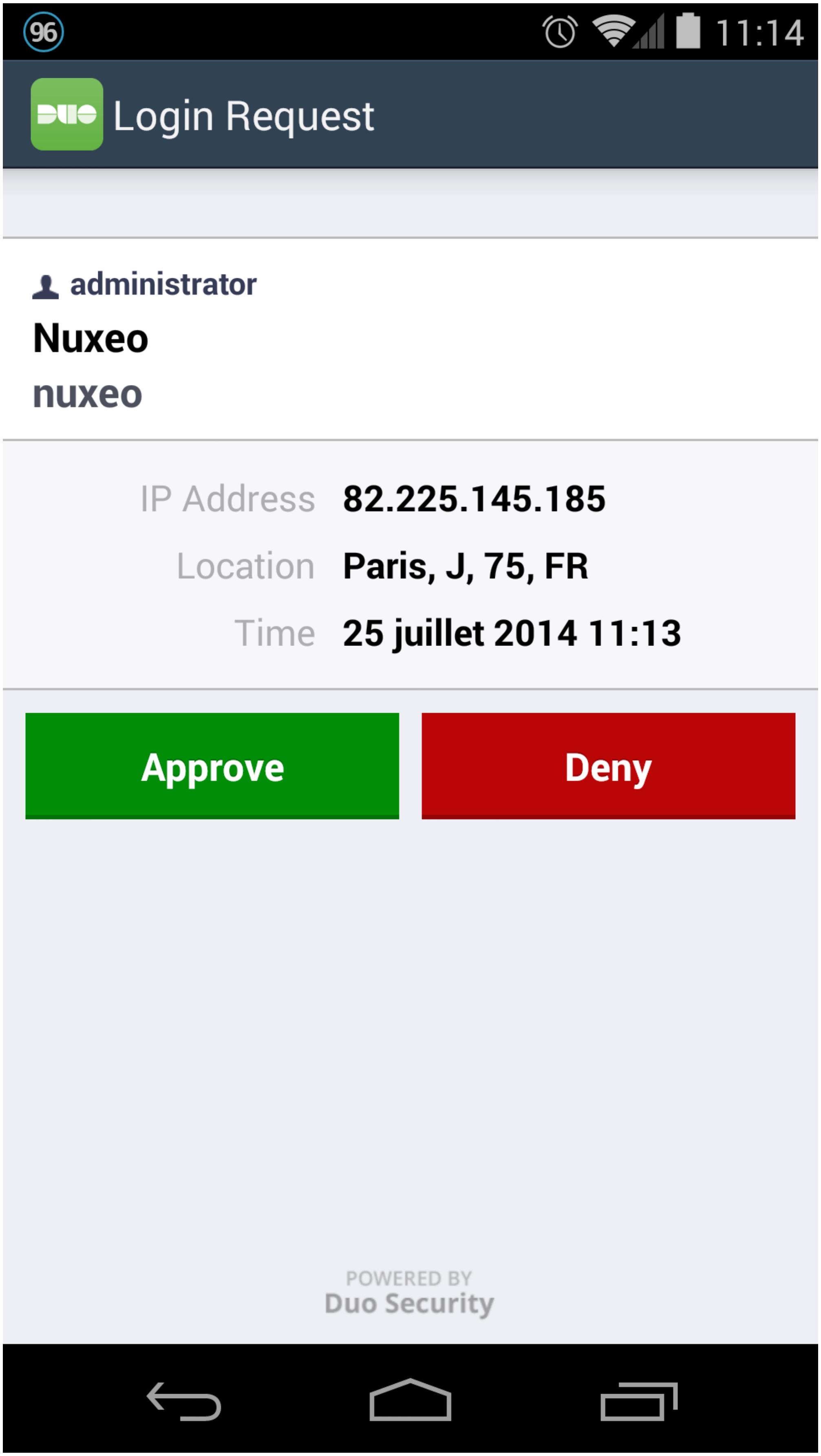
The two factors authentication is executing the following steps:

1. Login with your Nuxeo credentials

2. Bind/Use your Duo application to check identity through your mobile phone:



3. Confirm identity authorization with your mobile phone:


96
11:14
Login Request
administrator
Nuxeo
nuxeo
IP Address 82.225.145.185
Location Paris, J, 75, FR
Time 25 juillet 2014 11:13
Approve
Deny
POWERED BY
Duo Security