SWIM Portal

User Manual

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Date: Aug 15, 2022

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Normal User

1 ACCESSING SWIM PORTAL

To access the SWIM Portal, you may access it at https://swim.caam.my on any compatible web browser such as:

You can peruse the SWIM Portal either as a *Guest* (user who does not sign in) or as a *Registered User* (user who can sign into the portal and do something more than guests can do).

The *Sign In* button at the top right of the page is how registered users may log in to the SWIM Portal.

The Sign In window allows users to log in, create a new account, or request a password reset

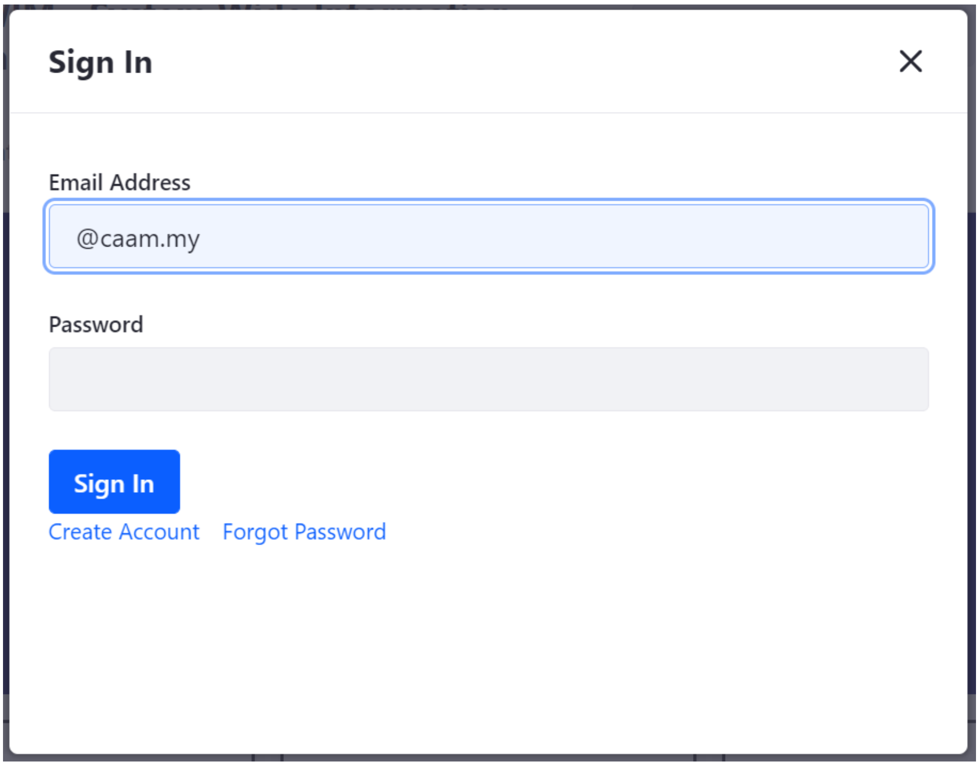


Figure 1.1: Sign In Window

By default, guest users can create accounts by clicking on the *Create Account* link in the *Sign In* window, completing the form, and submitting it.

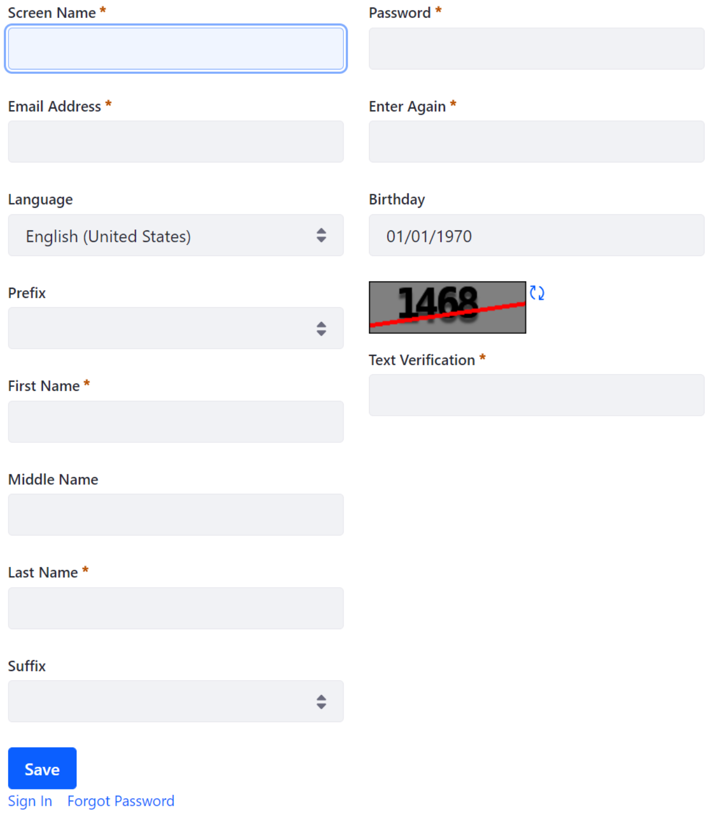


Figure 1.2: Create Account Window

If a user already has an account but has forgotten its password, the user can click on the *Forgot Password* link to request a password reset.

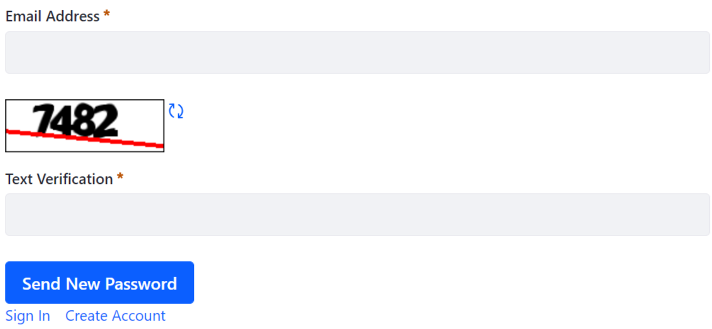


Figure 1.3: Forgot Password Window

Both the *Create Account* form and the *Forgot Password* form include a CAPTCHA-based text verification field. Using CAPTCHA prevents bots from submitting these forms.

2 SUBSCRIBING TO SERVICES

The SWIM Portal offers aeronautical services to users such as the *SWIM Flight Data Service*, the *SWIM Aeronautical Information NOTAM Service*, and the *SWIM Integrated Terminal Weather Service*.

Registered Users may subscribe to any of these services in order to be able to access the related data in *FIXM* (the Flight Information Exchange Model), *AIXM* (the Aeronautical Information Exchange Model), and *IWXXM* (the Meteorological Information Exchange Model) data format.

To subscribe to any of these services:

1) Navigate to the *Discovery* tab.
2) Click on the *Read More* link of the selected service. The related service page will be displayed.

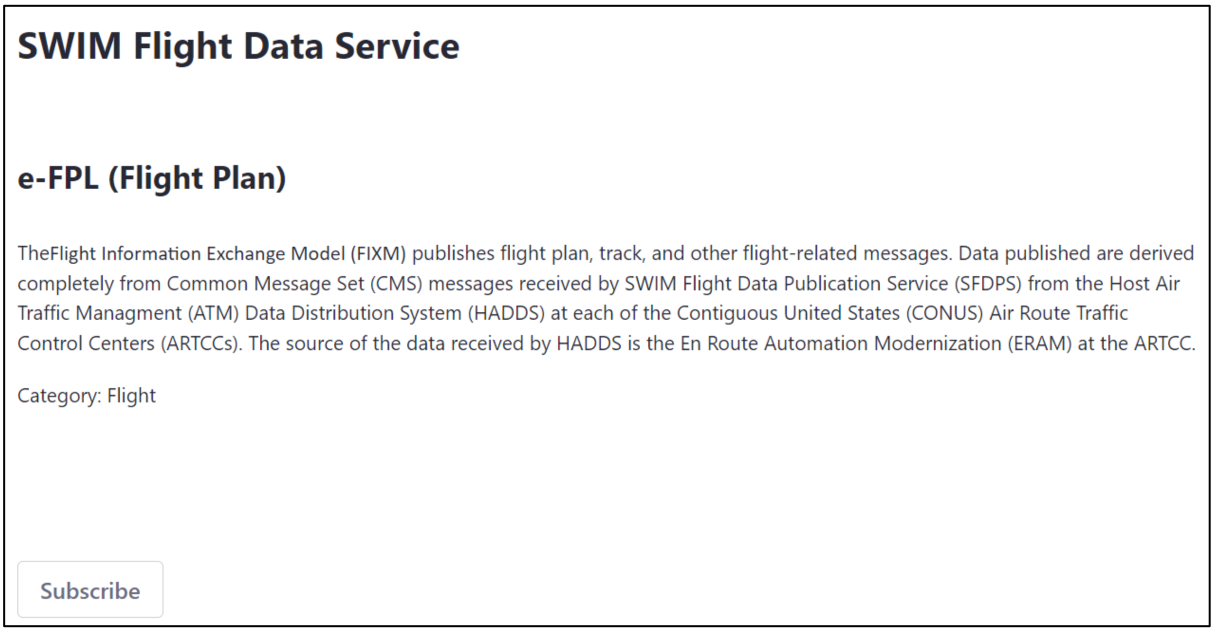


Figure 2.1 SWIM Flight Data Service Page

3) Click on the *Subscribe* button.
4) A User Subscription form will be displayed.

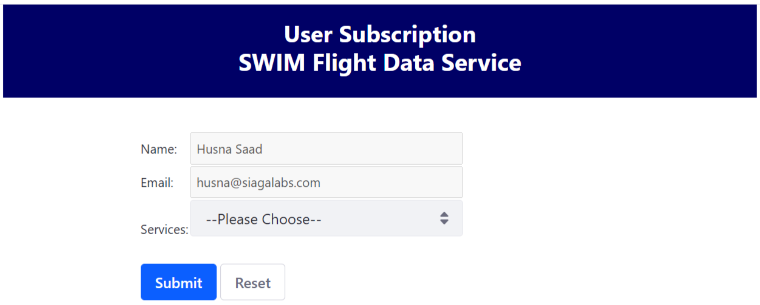


Figure 2.2: SWIM Flight Data Service User Subscription Form

5) In the *Services* dropdown list, select the desired service to subscribe to.
6) Click *Submit*. You will receive a success message saying

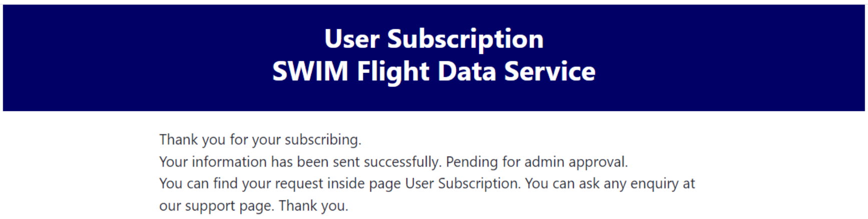


Figure 2.3: Successful Message upon Completing the User Subscription Form

7) To check on the status of your subscription requests, you can view them in the *Subscription* tab.

   You can view the list of services that you have subscribed to or have submitted a request for subscription in the following figure.

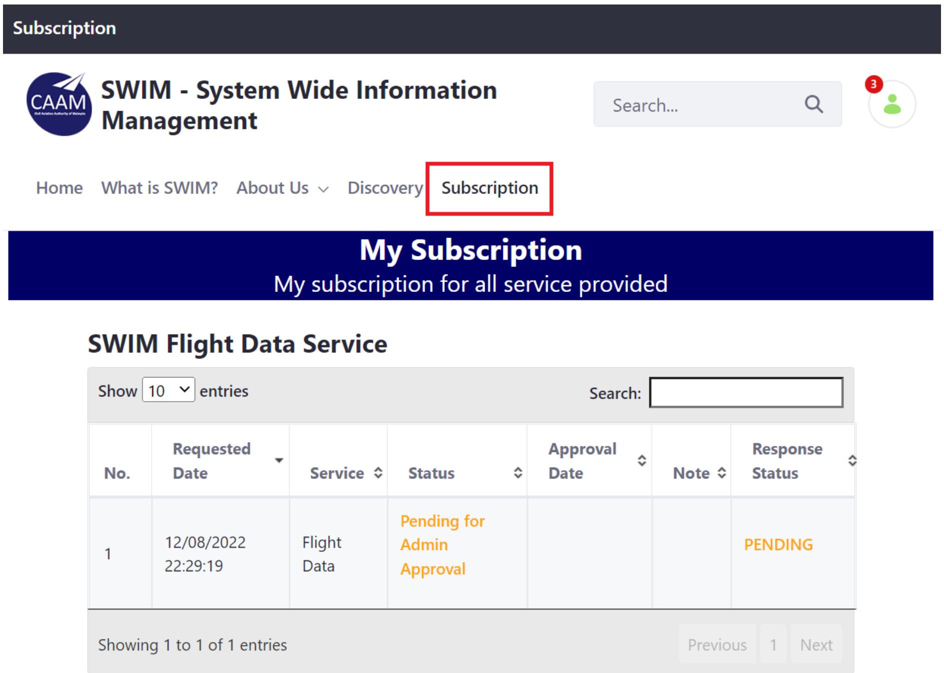


Figure 2.4: Subscription and Request Subscription Window

Administrator

3 MANAGING USERS

Users and Organizations are fundamental entities. If your site requires people (even just a set of site administrators) to have accounts to do anything, you need to know about users.

In case there's any confusion over the term, a User is an entity that can sign into the portal and do something. Generally, a User has more privileges, called Permissions, than a Guest of your site, who does not sign in. Users are assigned Roles, and Roles define the User's privileges. The remaining articles in this section give you guidance on managing (creating, deleting, editing, and more) Users and Organizations.

3.1 Adding, Editing, and Deleting Users

At the root of managing Users is adding, editing, and deleting them. If you are the Administrator, you can do all these things and more.

3.1.1 Adding Users

Here is how to add Users:

I. From the top right of the page, click on the ( ) *Menu* button.

II. Click *Control Panel* → *Users* → *Users and Organizations*.

III. In the Users tab, click the ( ) *Add* button.

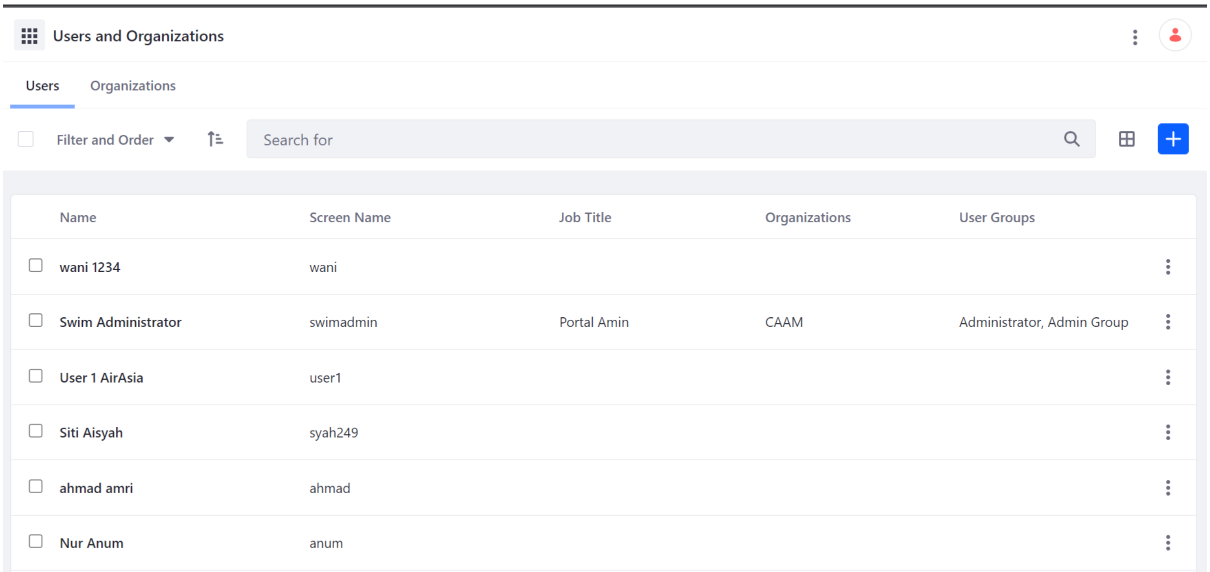
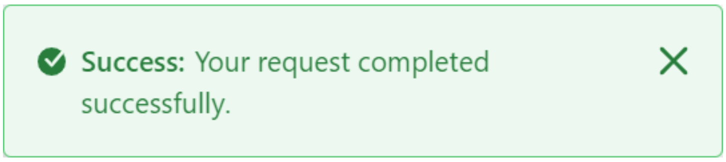


Figure 3.1: Add Users from the Users and Organizations Section of the Control Panel

IV. Fill out the Add User form and click Save. At a minimum, provide a Screen Name, First Name, Last Name, and Email Address for the User.

Note: Screen names and email addresses are not interchangeable. A screen name cannot contain the **@** symbol because it is used in the URL to a User's private page.

V. The Add User functionality is split over several independent forms. Saving the first form creates the User, and then you will see a success message saying



VI. After creating your user, click on the user to open an advance form with many sections. By default, the one you are on is the Information section. To the left is a navigation pane where you can continue configuring the user you're adding by clicking through the available sections. The options in the left menu change as you click through the tabs at the top. Peruse the sections for the three tabs (General, Contact, Preferences) and fill in all the applicable information.

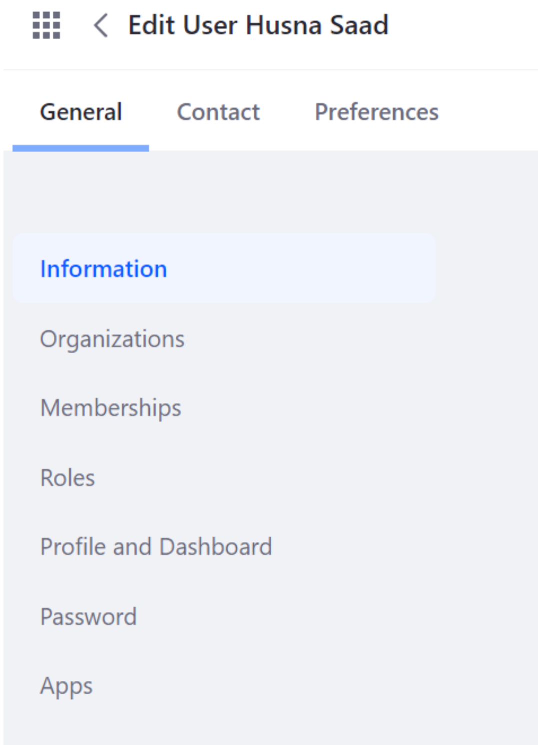


Figure 3.2: Information Form

At a minimum, enter a screen name, email address, and first name to create a new user account. Then you will be taken to the Information form and continue configuring the user.

You do not have to fill anything else out right now. Just note that when the user account was created, a password was automatically generated. If the portal was correctly installed and a mail server was set up, an email message with the User's new password was sent to the User's email address.

VII. In the event that no email has been sent automatically to the User's email address, click the *Password* item from the General menu and manually set a password for your new user. Enter the new password twice.

Enter the password twice to manually set the password for a user. If the Password Policy you are using is configured to allow it, select whether to require the user to reset their password the first time they sign into portal.

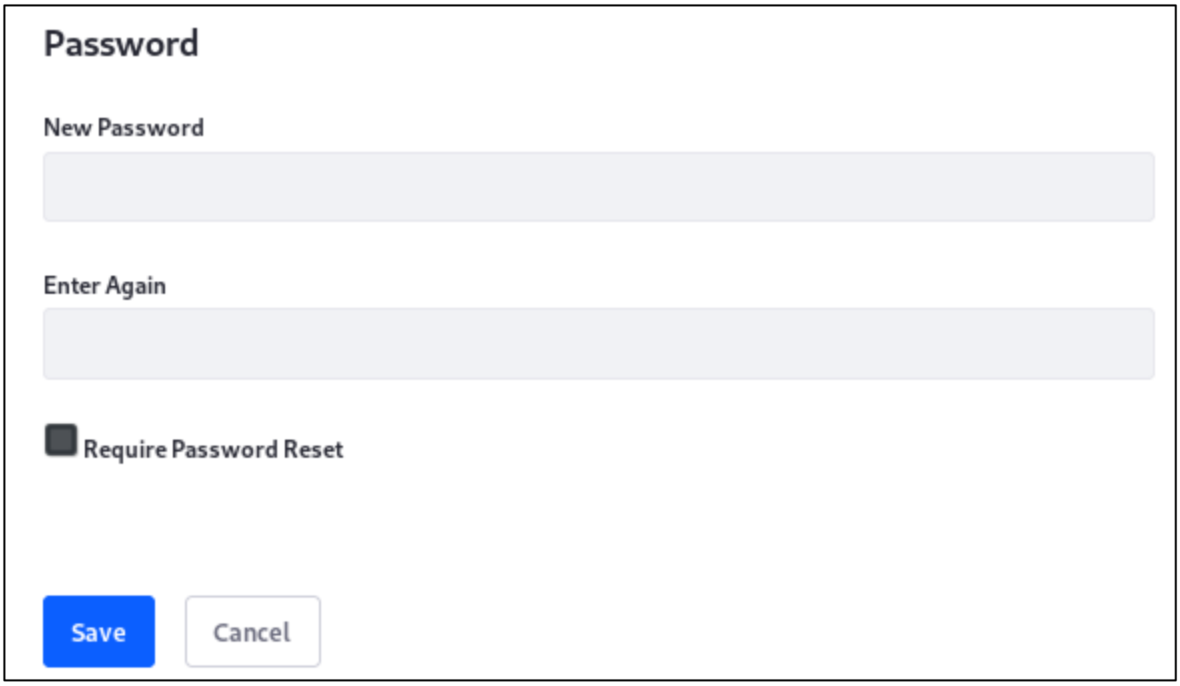


Figure 3.3: Password Window

3.1.2 Editing Users

If you click on *Users and Organizations* in the Control Panel, you will see your own user's account in the list of Users, along with any others. To change something about a particular user, click the *Actions* button (⋮) next to that user.

Choosing *Edit* takes you back to the Edit User page where you can modify any aspect of the User account including the screen name, email address, first name, last name, Site and Organization memberships, Roles, etc.

Choosing *Permissions* allows you to define which Roles have permissions to edit the User.

Choosing *Manage Pages* allows you to configure the personal pages of a User.

Choosing *Impersonate User* opens another browser window that loads the site as if you were the User so you can test your User management on a User to make sure you are achieving the desired behavior, without having to repeatedly log out of your administrator account and into the User's account.

Choosing *Deactivate* deactivates the user's account. The User is still in your database along with all the rest of your Users, but the account is deactivated, so the User cannot sign in to the portal. You can toggle between active and inactive Users in the Users view. If all the Users are active, this filtering option does not appear.

In the users list, you can choose whether to view active or inactive (deactivate) portal users as shown in the figure below.

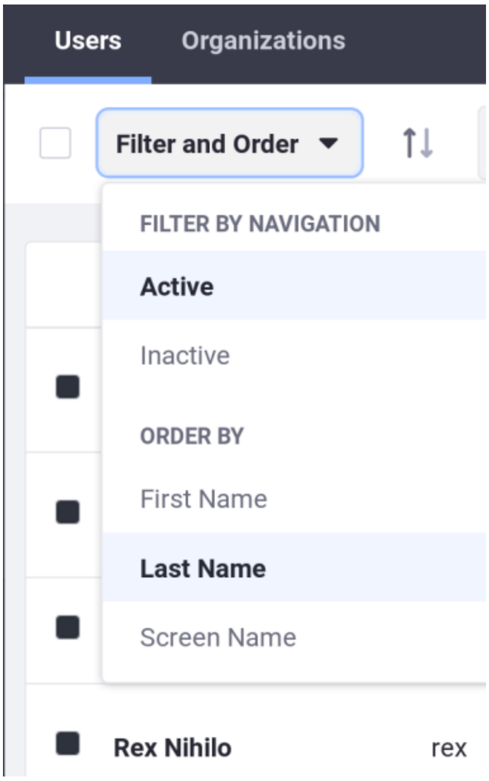


Figure 3.4: Users List- Active or Inactive Portal Users

Most Users cannot perform any of the above actions. In fact, most Users would not have access to the Control Panel at all. You can perform all of the above functions because you have the administrative access.

3.1.3 Deleting Users

You must be careful when deleting Users. To guard against accidental deletion of Users, a two-step process must be followed: Deactivate first, then delete.

I. Find the User to delete in the Users tab of *Control Panel → Users → Users and Organizations*. If you have a lot of Users, save time by searching for the User.

II. Click the *Actions* menu for the User and select *Deactivate*. You are asked to confirm that you want to deactivate the User. Click *OK*.

III. You will see a success message and the User disappears but is not gone yet.

IV. By default the Users table displays only Active users. Click on *Filter and Order* in the top of the table and a dropdown menu appears. Click *Inactive*, and you can see the User you just deactivated.

V. Click the *Actions* menu again, and click *Delete* if you really mean to delete the User. Confirm that you want to delete the User, and now the User is gone. This time, it is permanently.

Deactivated Users: Deactivating a User means the User cannot log in to the portal. He/she has no more permissions in the Sites and pages of the portal than a guest, although the account still exists in the system.

Users are reactivated when an administrator finds them in the Users table (be sure you are filtering the table results by Deactivated users), clicks the Actions menu, and selects Activate. There is no confirmation window for activation: they are automatically restored to their former status once Activate is clicked.

4 MANAGING ROLES

You manage Roles and Permissions in the Control Panel (*Control Panel → Users → Roles*). There you will find an application for creating Roles, granting permissions, and assigning Users to them. Roles can be scoped by portal, Site, or Organization.

The Roles application allow you to add and manage roles for the global (Regular), Site, or Organization Scope as shown in the following figure.

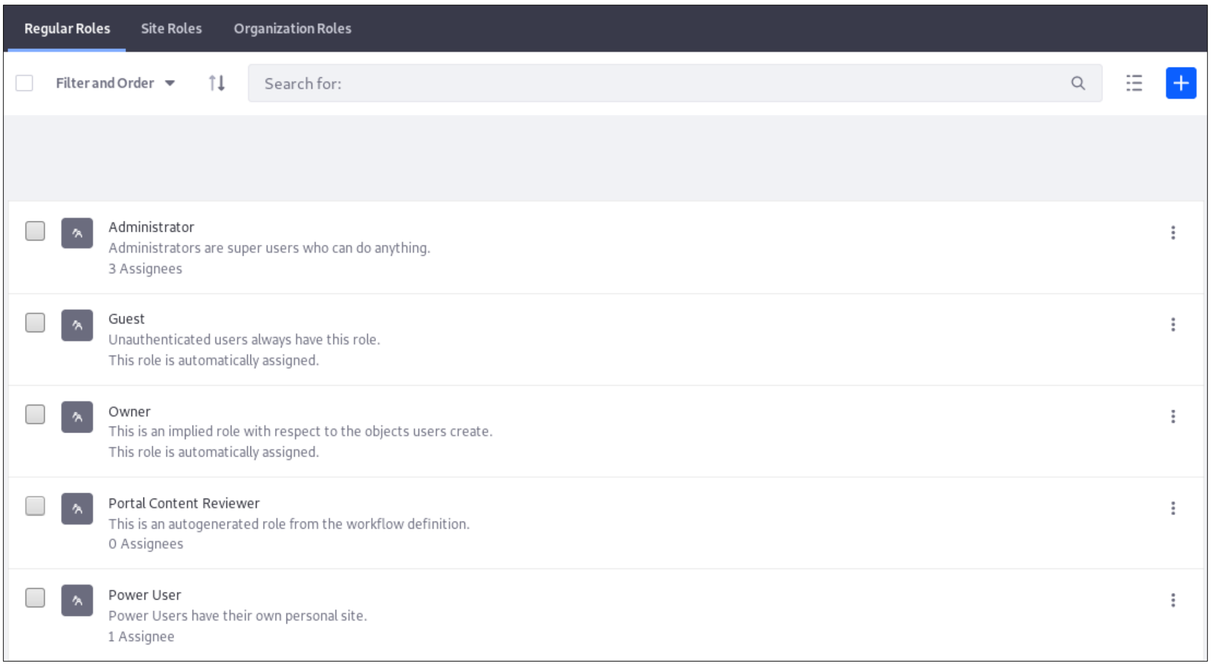
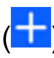


Figure 4.1: Roles Application Window

4.1 Creating Roles

Determine the scope of the Role you must create. Roles can be scoped globally (Regular Roles), to a specific Site (Site Roles), or to an Organization (Organization Roles). To create a Role:

I. Click the tab for the proper Role scope, then click the () *Add* button.
II. Enter a title and description. The title field is required but the description is optional.
III. Enter a Key, if desired. This required field provides a key that can be used to refer to the Role programmatically. It's auto-populated with the title text, but you can override it if desired.
IV. Click *Save*.

Now the Role is present in the database and ready for further configuration.

4.2 Assigning Users to a Role

Assign users to a Role in the Assignees tab of the Add/Edit Role form. Roles are assigned to Users, Sites, Organizations, or User Groups. The following are steps to assign the User Group Manager Role created in the last section to Users:

I. In the Assignees tab of the Add/Edit Role form, click the second level tab for *Users*.
II. Click the *Add* button ( ).
III. Select the Users you want to add to the Role and click *Add*.

If assigning a group, note that all Users assigned to that group inherit the Role as well.

That is a good start, but your Role is not worth the database row it occupies without defining permissions for the Role. Read the next section to learn how.

4.3 Defining Role Permissions

Roles collect permissions, so when Users are given a Role, they receive all the permissions defined by the Role.

If you create a Role with permission to access something in the Control Panel, keep in mind that the *View Control Panel Menu* permission is automatically granted.

Consider a Role called User Group Manager. Define the permissions for the User Group Manager Role so that assigned Users can add Users to or remove Users from any User Group:

I. Go to the Control Panel and then click on *Users* → *Roles*.
II. On the Regular Roles screen, click *Add* ( ).
III. After naming your Role, click *Save*.
IV. Click on the *Define Permissions* tab.
V. Drill down in the menu on the left to *Control Panel* → *Users* → *User Groups*.

VI. Under the *Application Permissions* heading, flag *Access in Control Panel* and *View*. This lets user group managers access the User Groups Control Panel portlet and view existing User Groups.

VII. Since you want User Group managers to be able to view User Groups and assign members to them, also check the *Assign Members* and *View* permissions under the *Resource Permissions* → *User Group* heading.

VIII. There’s one last necessary permission you might not think of in association with this Role. In *Control Panel* → *Users* → *Users and Organizations*, User Group managers need *View* permission on the User resource. Grant this permission.

IX. Click *Save*.

When defining permissions on a Role, the Summary view provides a list of permissions that have already been defined for the role. The area on the left side of the screen lets you drill down through various categories of permissions as shown in the figure below.

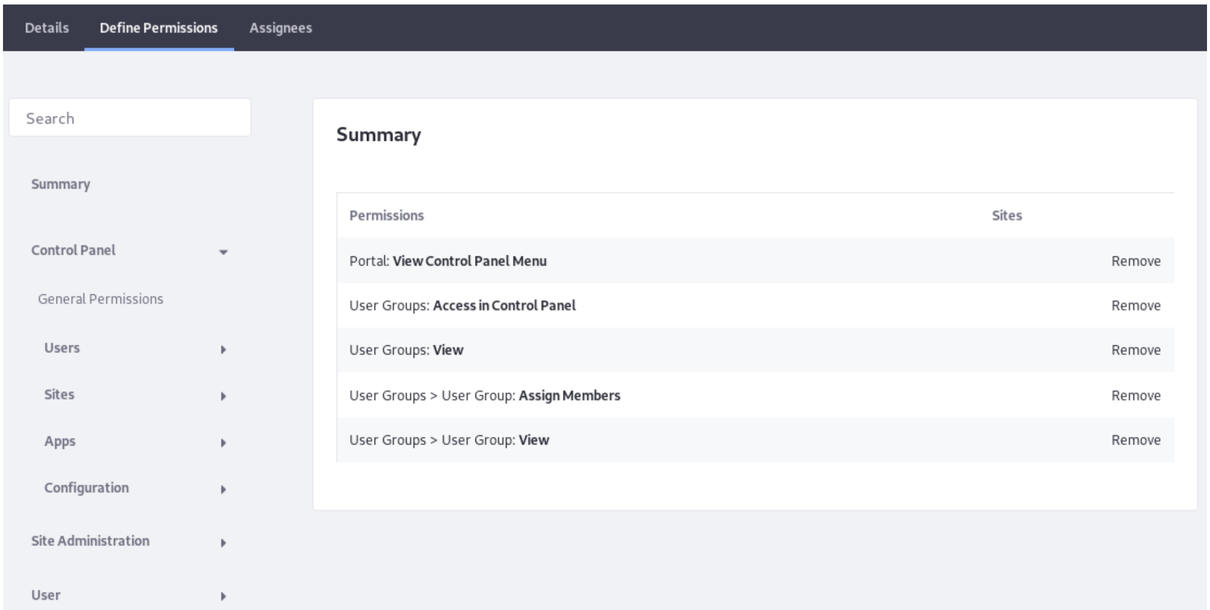


Figure 4.2: Permission Window

Now the User Group Manager Role has all the permissions necessary for adding Users to User Groups. After all, User Group managers can view User Groups, assign members, and access User Groups in the Control Panel. The permission to view Users in the Control Panel was necessary because you must view Users to assign them as members of a Role. Without this permission, User Group managers see an empty list if they try to add Users to a Role.

5 CREATING ARTICLES

The *Knowledge Base* widget in the left panel contains everything you need to create articles in the *Articles* section under the *About Us* tab. You can create articles by authoring them in the portal's WYSIWYG editor or by importing them from Markdown files (.markdown, .md) in a ZIP archive. The subsections below cover both ways of creating articles.

To navigate to the *Knowledge Base* widget, open the Menu ( ) then go to *Site Administration* (the left panel menu) → *Content & Data* → *Knowledge Base*. The *Knowledge Base* widget has three tabs:

I. **Articles**: Create and manage articles and folders.
II. **Templates**: Create and manage templates.
III. **Suggestions**: Manage user-submitted feedback for articles.

Select the *Articles* tab, then proceed to the sections below for instructions on creating articles.

The Knowledge Base menu in the Site Administration lets you create articles to be published in the Articles section under the About Us tab as shown in the figure below.

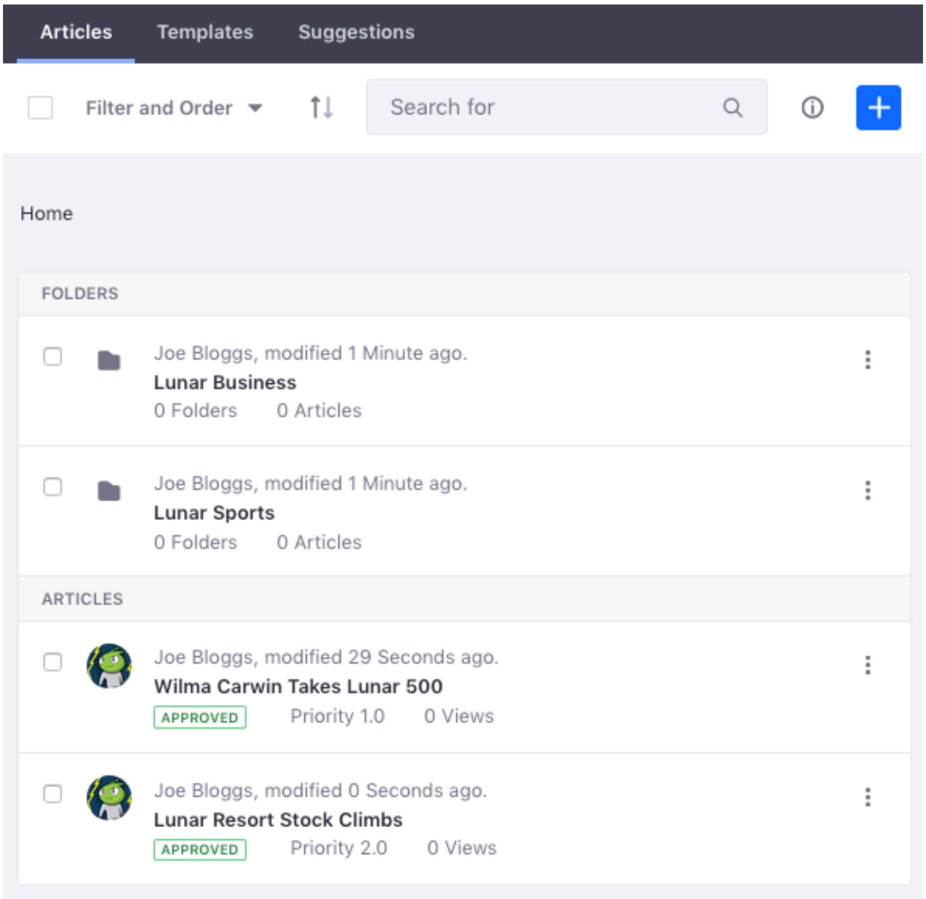


Figure 5.1: The Knowledge Base Menu

5.1 Authoring Articles in the Editor

Follow these steps to create an article in the editor:

I. In the *Articles* tab, click the *Add* button ( ) and choose *Basic Article* or the name of an available template. This brings up the *New Article* form.

II. Enter a title for the article. A URL-safe version of the title you provide is added to the end of the article's friendly URL. You can manage the friendly URL in the *Configuration* section's *Friendly URL* field.

III. Use the WYSIWYG editor to create the article's content. To view or edit the article's HTML source, click the *Source* button in the editor. The sections below the editor let you add attachments and tags, specify related assets, and set permissions for the article. By default, View permission is granted to the Guest role, meaning anyone can view your article.

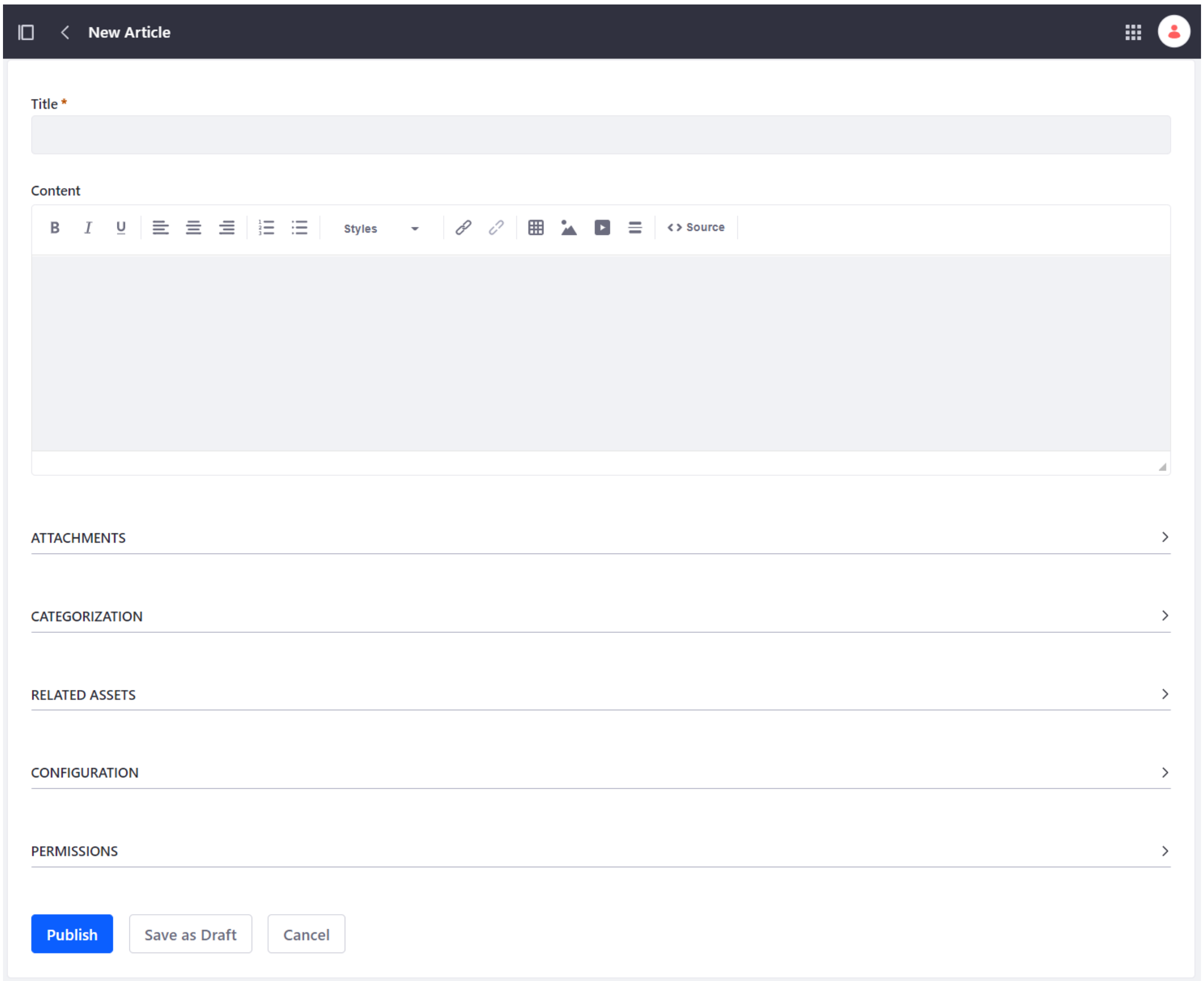


Figure 5.2: WYSIWYG Editor

IV. Click *Publish* to submit the article for publication or click *Save as Draft* to continue working on it later. Note that if you have enabled workflow for the Knowledge Base, your article must be approved before publication.

Once the article is saved, it is converted automatically to HTML for the Knowledge Base. Articles are listed in a table in the *Articles* section under the *About Us* tab.

5.2 Importing Articles

You can also create new articles by importing them from a ZIP archive that contains articles in the Markdown format (.markdown, .md). For example, you could write articles in your favorite Markdown editor, package them in a ZIP file, and then import that ZIP file to create those articles in the Knowledge Base. The Knowledge Base can also prioritize articles by their filenames' numerical prefixes. For example, the Knowledge Base would list 01-article.markdown and 02-article.markdown in ascending order by their numerical prefix (01, 02).

Follow these steps to import articles into the Knowledge Base:

I. In the *Articles* tab, click the *Add* button () and choose *Import*. This brings up the *Import* form.
II. Click *Browse* and select the ZIP file that contains the articles you want to import.
III. If you want to use the files' numerical prefixes to prioritize the imported articles in the Knowledge Base, select *Apply numerical prefixes of article files as priorities*.
IV. Click *Save* when you are finished.

Like all articles, imported articles are automatically converted to HTML for the Knowledge Base and listed in a table with the rest of the articles in the *Articles* section under the *About Us* tab.

You can import ZIP files that contain your articles in Markdown format as shown below.

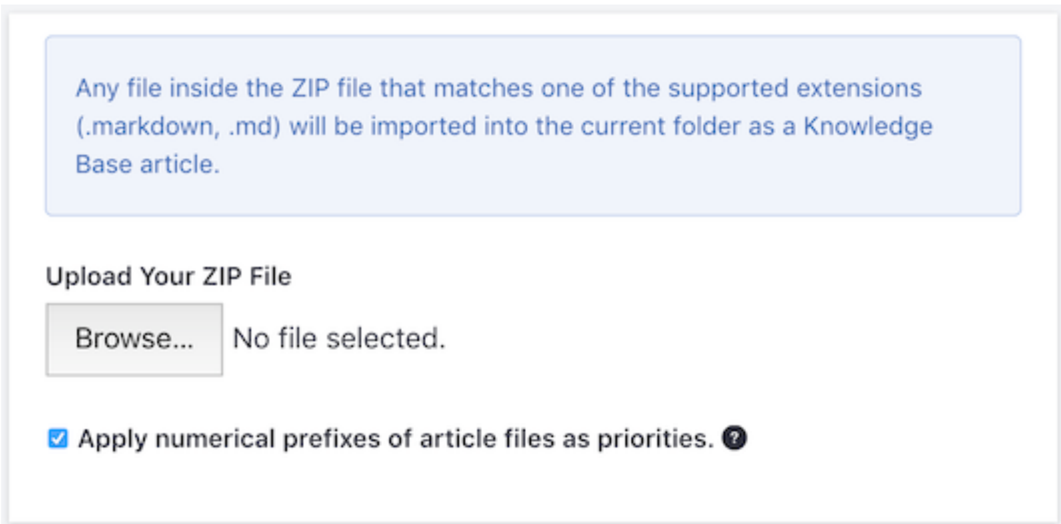


Figure 5.3: Import ZIP files in Markdown Format

5.3 Managing Articles

Each article also has a *priority* value that determines its position in the Knowledge Base Display widget's navigation. Each article's priority value appears beneath the article's title. The Knowledge Base Display widget's navigation arranges articles in ascending priority. Priority 1 is the highest priority. The higher an article's priority, the higher it appears in the navigation. Articles are assigned the next lowest priority by default.

To assign articles a new priority value, follow these steps:

I. Select *Move* from the *Actions* menu (⋮) next to the article.
II. Enter a new priority value for the article.
III. Click *Move* to apply the new priority.

You can also organize articles with folders. Follow these steps to create a folder:

I. Click the *Add* button (+) and select *Folder*. This opens a form for creating the new folder.
II. Enter a name and an optional description. By default, anyone can view the folder.
III. Click *Save*. The folder is then listed in a table in the *Articles* section under *the About Us* tab.

The text immediately below the *Filter and Order* selector at the top of the page shows your position in the folder hierarchy. Click a folder's name in the hierarchy to navigate to it. You can also move articles into folders and create child articles. Knowledge Base also supports nested folders.

This following screenshot uses a red box to highlight the text that indicates the current position in the folder hierarchy

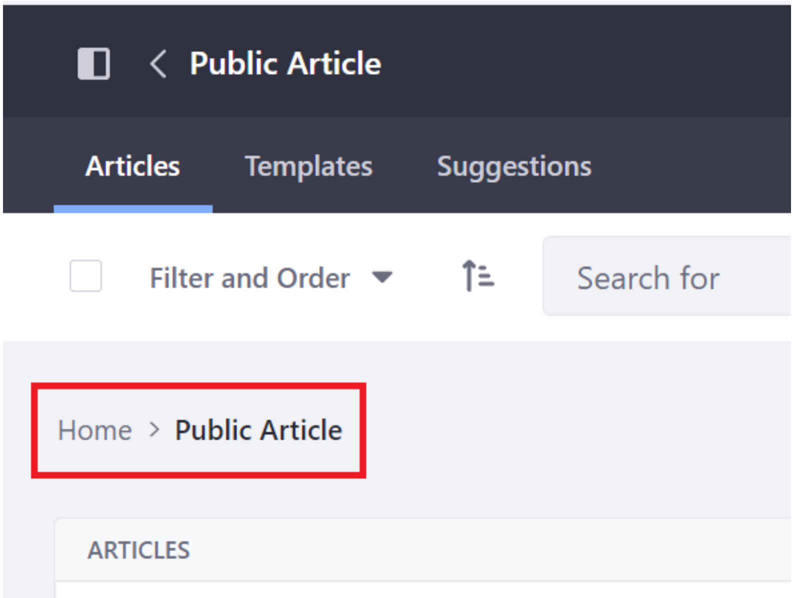


Figure 5.4: Usage of Red Box in the Folder Hierarchy

Each folder's *Actions* menu (⋮) lets you perform the following actions on the folder:

I. **Edit**: Change the folder's name and description.

II. **Move**: Relocate the folder under a new parent folder or update its priority.

III. **Delete**: Remove the folder and its articles from the Knowledge Base.

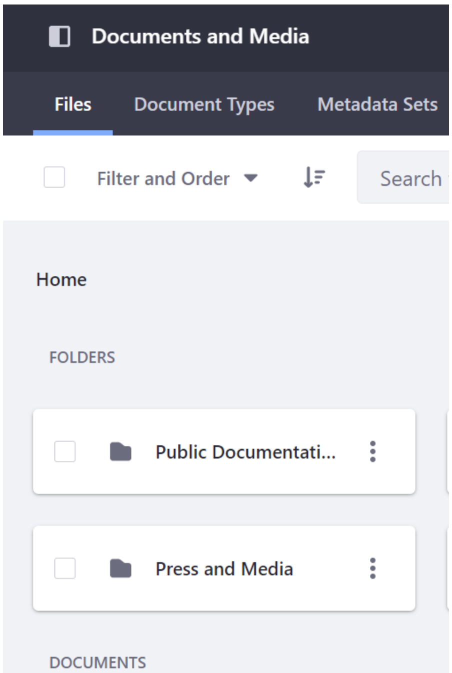
IV. **Permissions**: Grant or revoke the following permissions: add an article to the folder, add a sub-folder to the folder, delete the folder, move the folder, set permissions on the folder, edit (update) the folder, and view the folder.

You can also delete multiple articles or folders at once. To do this, select the checkbox for each item that you want to delete and click the *Delete* button (ⓧ) that appears in the Management Bar. You can also see the info for selected items by clicking the *Info* button (ⓘ) in the Management Bar.

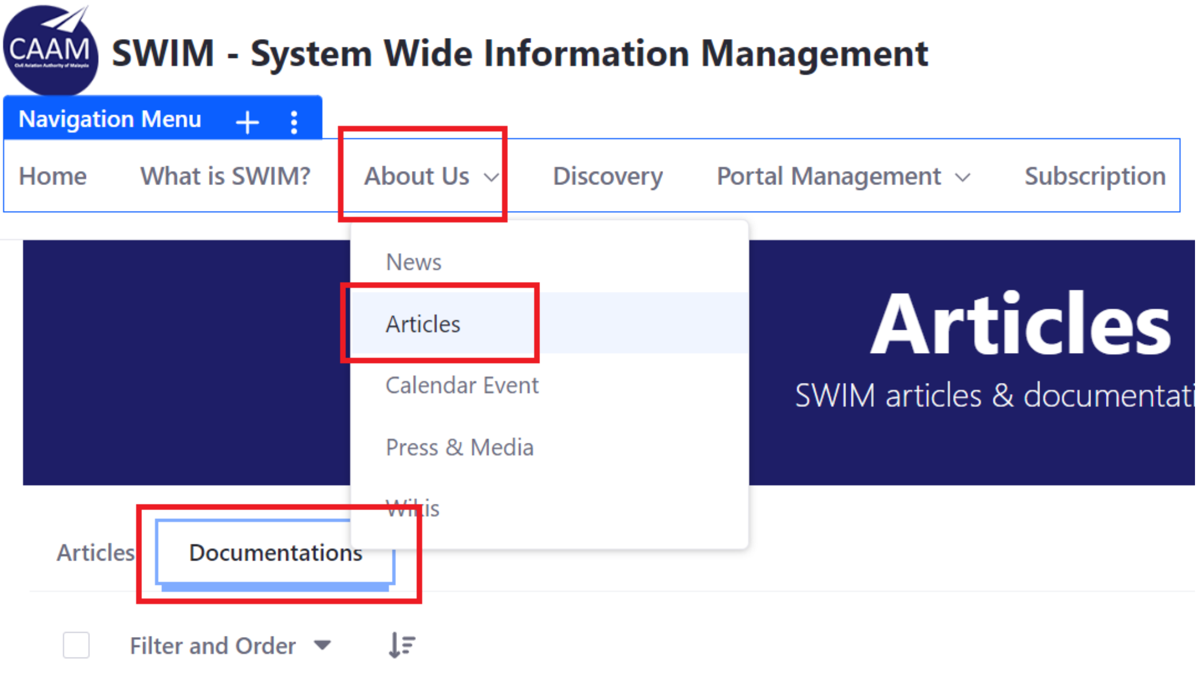
6 MANAGING DOCUMENTS AND MEDIA

The Documents and Media library stores files on the server using the same type of structure that you use to store files locally. It accepts files of any kind, can serve as a virtual shared drive, and can mount and browse external repositories. You can organize documents using customizable document types and metadata sets and display them with automatic document preview generation.

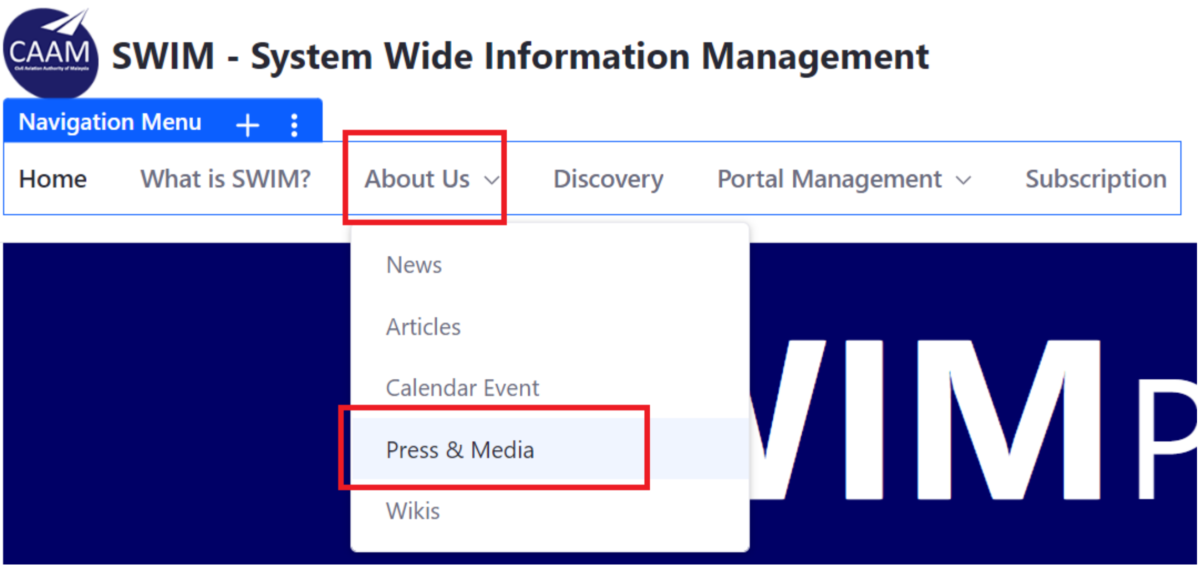
There are two folders created in the Documents and Media library: *Public Documentation* and *Press and Media*.



The *Public Documentation* folder is used to manage the documents that are to be published in the *Documentations* segment under the *Articles* section in the *About Us* tab.



The *Press and Media* folder is used to manage the media (such as image, audio, and video files) that are to be published in the *Press & Media* section under the *About Use* tab.



6.1 Adding Files

Follow these steps to add files to your site's Document Library:

I. Open the *Menu* ( ), navigate to *Content & Data* → *Documents and Media*. The *Documents and Media* screen appears and displays the Documents and Media library ' s *Home* (its root folder). As you add files and folders to the Document Library, they are listed here.

The Documents and Media's Home Folder contains several folders and documents as shown below.

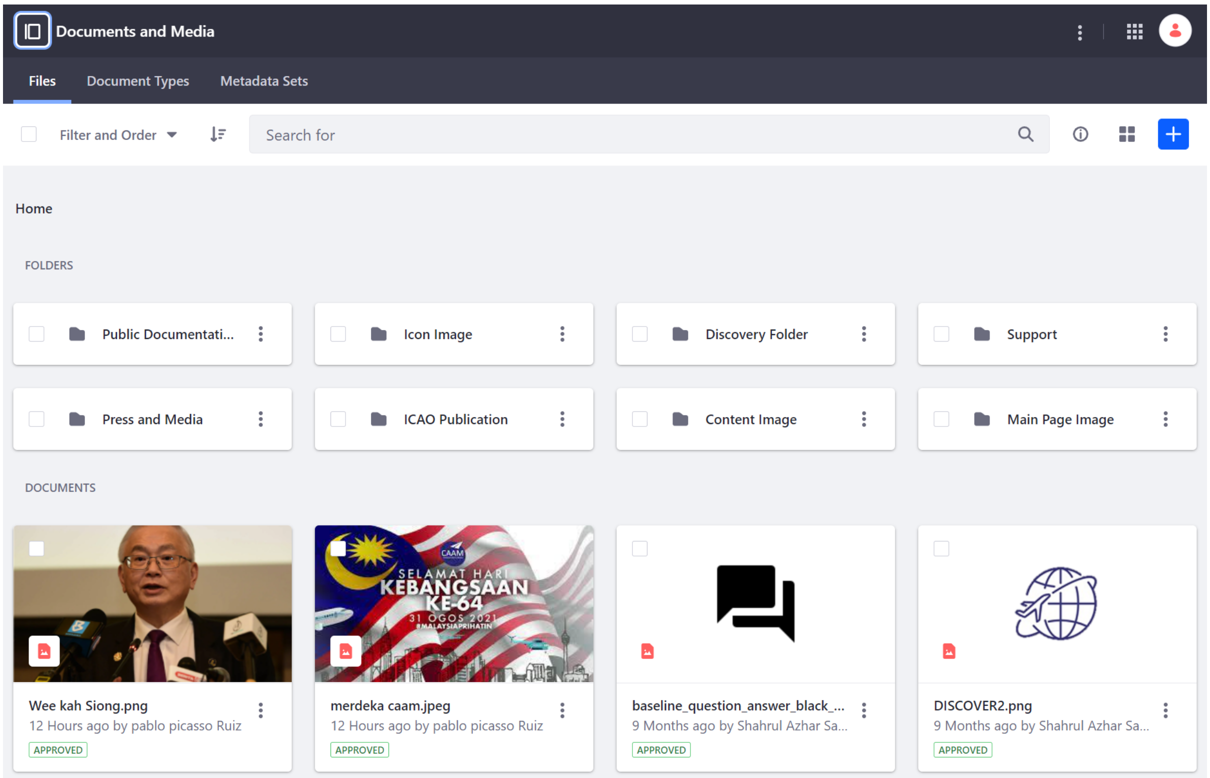


Figure 6.1: Documents and Media's Home Folder

II. Click the *Add* icon ( ) and select the type of document to add to the Document Library. You can add documents, folders, and shortcuts much like you would on a desktop file system. You can even configure access to an entirely different repository. The Add menu's options are described below. The Add menu lets you upload and add all kinds of documents to the library

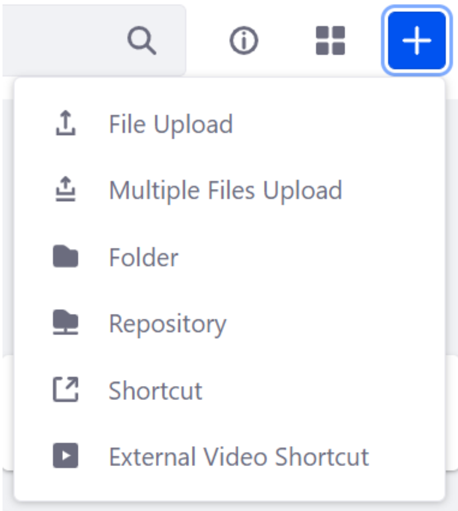


Figure 6.2: The Add Menu

III. When you are finished selecting the file to upload and filling out any document type fields that are necessary, click *Publish.*

File Upload: Upload a file to the Documents and Media library.

Multiple Files Upload: Upload several files at once. You can apply a single description and document type to all the files. You can also categorize and tag the files and assign them default permissions.

Folder: Create a new folder in the Documents and Media library's file system.

Repository: Add access to an external repository.

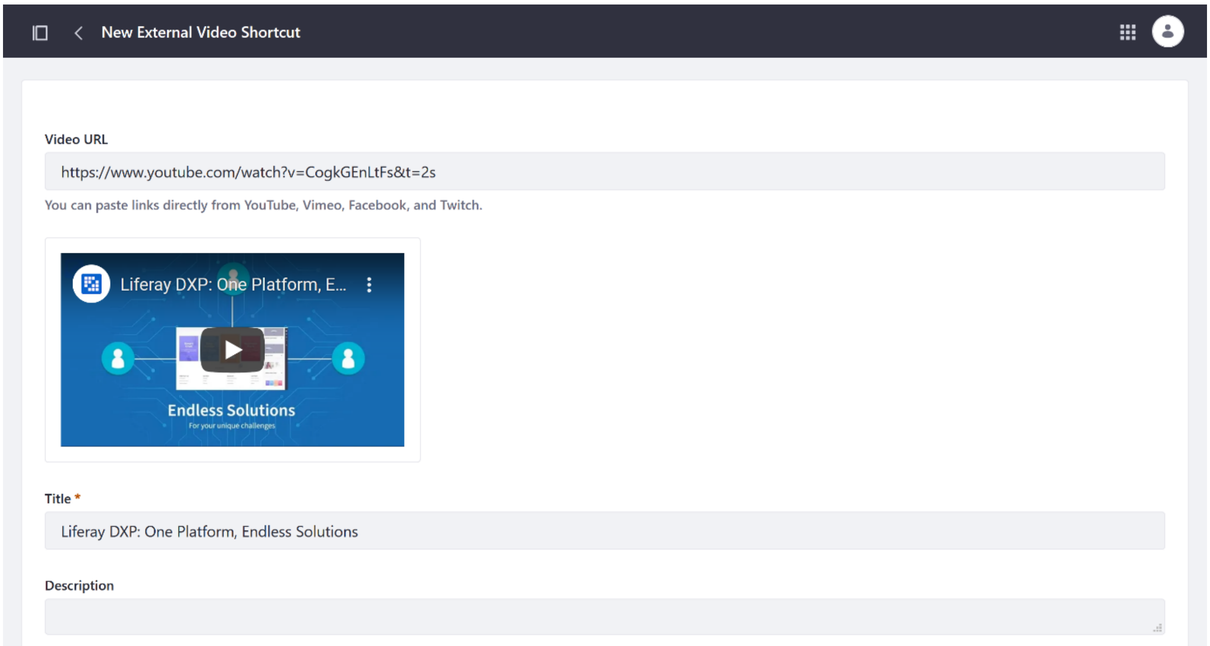
Shortcut: Create a shortcut to any document that you can view. You can set permissions on the shortcut to specify who can access the original document via the shortcut.

External Video Shortcut: Create a shortcut reference to video hosted on external platforms. These references can then be used to embed videos into the portal. YouTube, Facebook, Vimeo, and Twitch are supported out of the box, but you can extend this feature to support custom video sources.

Follow these steps to create an external video shortcut:

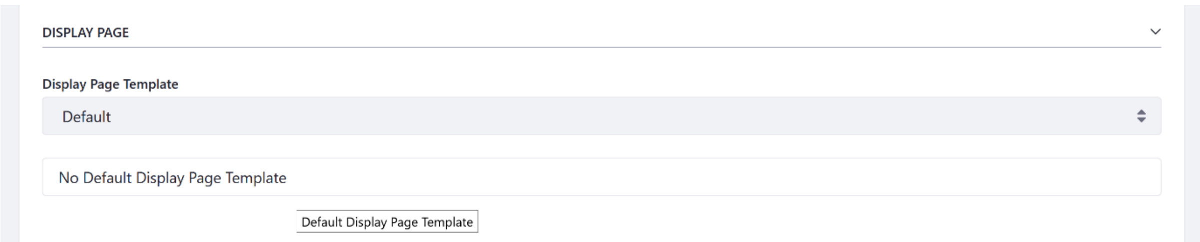
I. Click the *Add* button (+) and select *External Video Shortcut*.

II. Enter a video URL from a supported platform: YouTube, Vimeo, Facebook, or Twitch. Videos from YouTube and Vimeo display a URL thumbnail. Facebook and Twitch videos do not.



III. Enter a title for the shortcut. This field is auto populated for YouTube and Vimeo. Facebook and Twitch require manual input.

IV. (Optional) Select a Display Page Template for the video. The selected template displays the video at a unique friendly URL and defines the display page's layout.



V. Click *Publish* when finished. You can view and manage external video shortcuts like any other Documents and Media asset.

6.2 Adding Folders

You will need folders to organize all but the most limited set of files. Here, you will learn how to work with folders in a Document Library. Follow these steps to add a folder:

I. Open the *Menu* ( ), click on your site's name, and navigate to *Content & Data* → *Documents and Media*. The *Documents and Media* screen appears and displays the Documents and Media library's *Home* (its root folder).

II. Click the *Add* button ( ) and select *Folder*. The New Folder form appears.

III. In the New Folder form, name and describe your folder. Then expand the *Permissions* section.

IV. In the *Permissions* section, set the folder's permissions. The *Viewable* by menu lets you select who has View permission for the folder:

   a) Anyone (the Guest role; this is the default option)
   b) Site Members
   c) Owner

Click the *More Options* link to choose the other folder permissions for the Guest and Site Member roles. By default, site members can add files, subfolders, shortcuts, and subscribe to changes to the folder's files. Guests do have any such permissions, which is typically what you want.

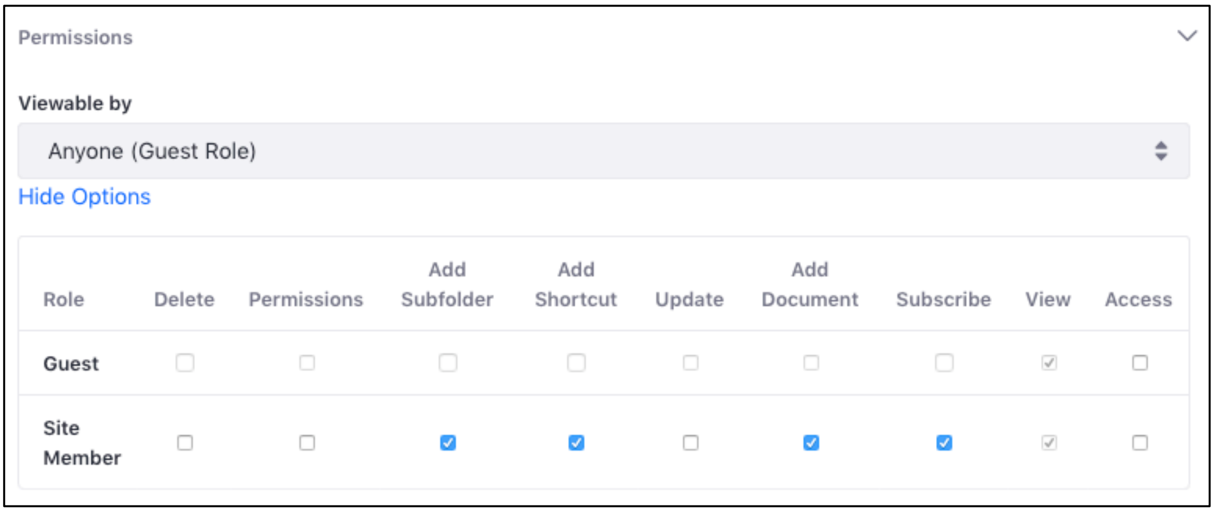


Figure 6.3: Selecting Folder's Permissions

Upon creating the folder, it appears in your Document Library. Opening the folder's *Actions* menu ( ) presents several options for managing the folder. The following sections describe some of these options.

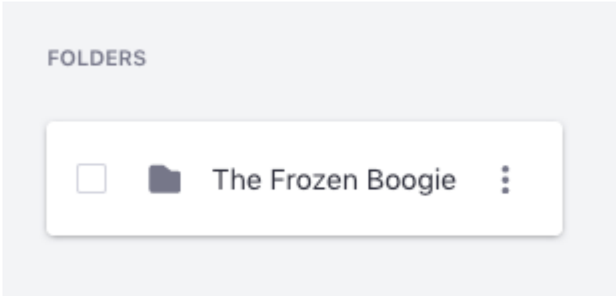


Figure 6.4: New Folder in the Document Library

7 WORKING TOGETHER WITH THE WIKI

Wiki, like the Message Boards, is a full-featured wiki application which has all of the features you would expect in a state-of-the-art wiki. So, what is a wiki? Basically, a wiki is an application which allows users to collaboratively build a repository of information. There are, of course, many implementations of this idea, the most famous of which is Wikipedia. Wikipedia is a full online encyclopedia developed collaboratively by users from all over the world, using a wiki. A wiki application allows users to create and edit documents and link them to each other.

7.1 Adding and Editing Wiki Pages

By default, there is one page added to your wiki, called *FrontPage*. To get started adding data to your wiki, click the *Edit* link. You will be brought to a blank editing page. By clicking Edit, you can create/modify your wiki content as shown in the following figure.

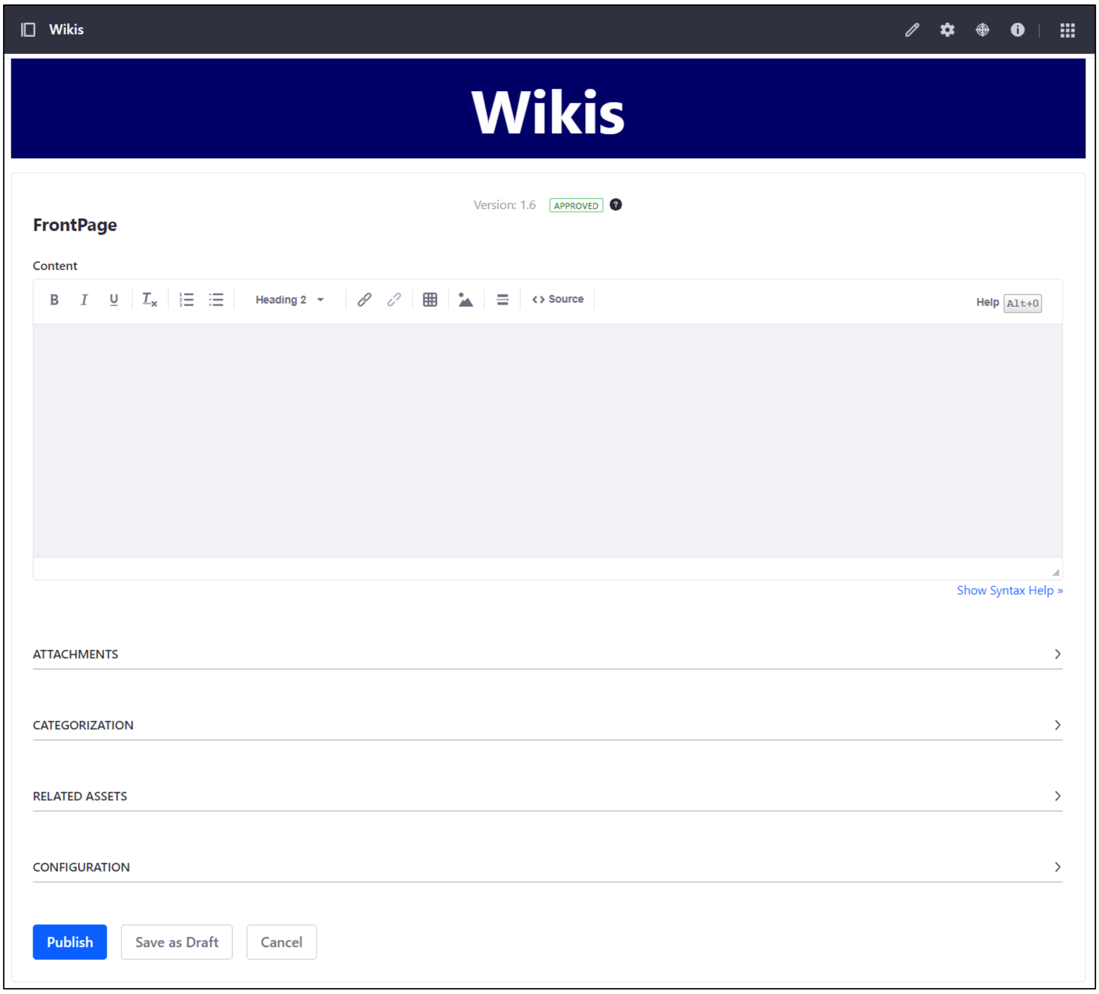


Figure 7.1: Create or Modify Wiki Content

You can now begin to add content to the page. Notice that there is a very convenient *Show Syntax Help* link which can help with the wiki syntax. You can use this syntax to format your wiki pages. Consider, for example, typing the following text in the Content page:

```
== Welcome to Our Wiki! ==

The System Wide Information Management (SWIM) concept consists of
standards, infrastructure and governance enabling the management of ATM
related information and its exchange between qualified parties via
interoperable services (ICAO Doc. 10039).

This is our new wiki, which should allow us to collaborate on
documentation. Feel free to add pages showing people
how to do stuff. Below are links to some sections that have already
been added.
```

Click *Publish*. This would produce the following wiki page.

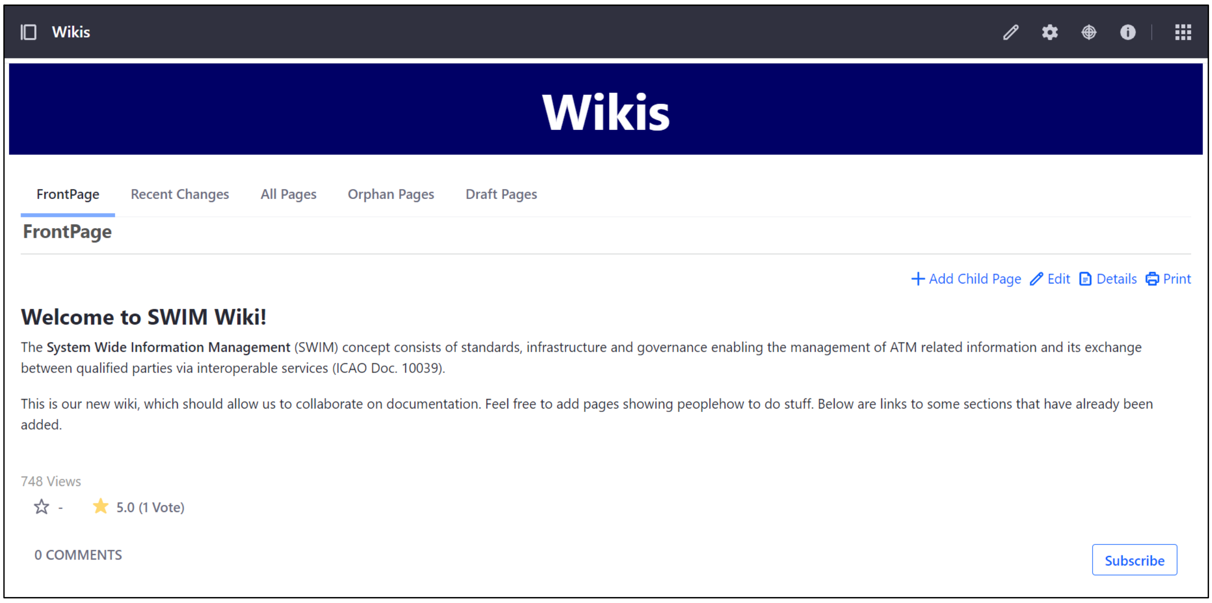


Figure 7.2: Format Wiki Headings and Text

You can format your wiki headings and text as shown in the figure above.

7.2 Page Details

When viewing a page, you can view its details by clicking the *Details* link which appears in the top right of the page. This allows you to view many properties of the page. There are several tabs which organize all of the details into convenient categories.

7.2.1 Details

The Details tab shows various statistics about the page, and also allows you to perform some actions on the page.

I. **Title**: displays the title of the page.
II. **Format**: displays the format for the page – either Creole, HTML, or MediaWiki.
III. **Latest Version**: displays the latest version of the page. The wiki portlet automatically keeps track of page versions whenever a page has been edited.
IV. **Created By**: displays the user who created the page.
V. **Last Changed By**: displays the user who last modified the page.
VI. **Attachments**: displays the number of attachments to the page.
VII. **Convert To**: offers different conversion formats for the wiki page: DOC, ODT, PDF, RTF, SXW, and TXT.
VIII. **RSS Subscription**: displays links which allow you to subscribe to the page as an RSS feed in three formats: RSS 1.0, RSS 2.0, and Atom 1.0.
IX. **Email Subscription**: contains links allowing you to subscribe to the entire wiki or just to this page.
X. **Advanced Actions**: contains links allowing you to modify the permissions on the page, make a copy of the page, move (rename) the page, or move the page to the recycle bin.

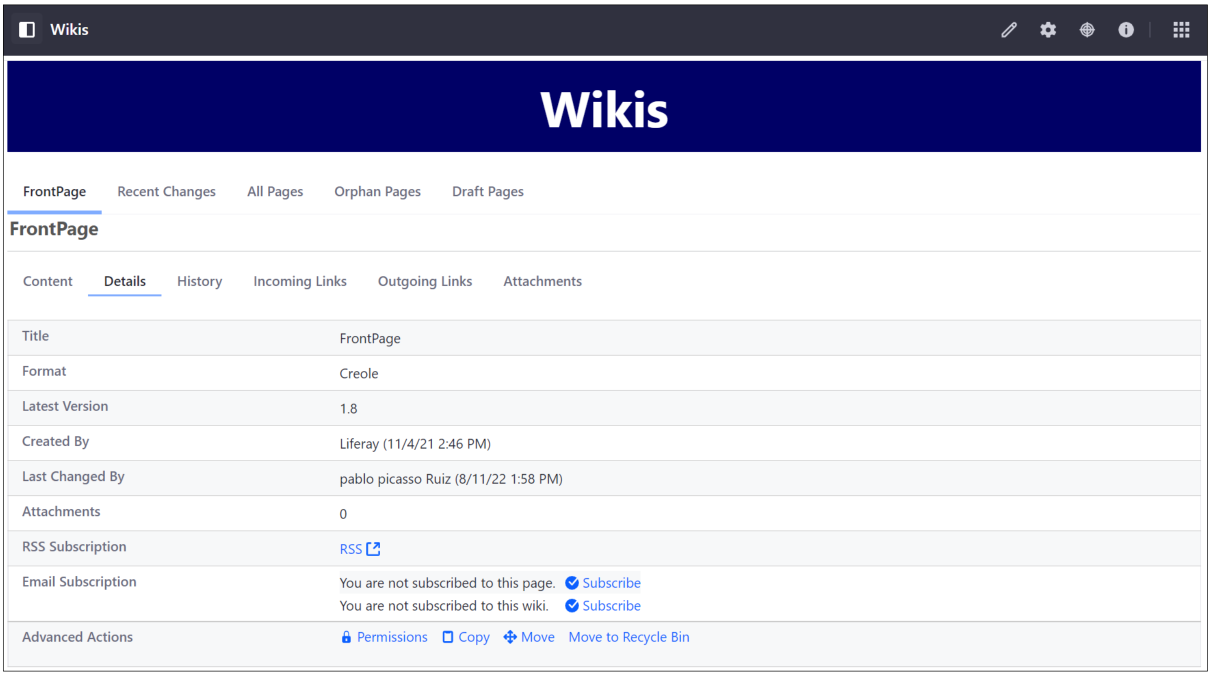


Figure 7.3: Wiki Page Viewing Details

7.2.2 History

This tab shows a list of all of the versions of the wiki page since it was created. You can revert a page back to a previous state and you can also compare the differences between versions by selecting the versions and then clicking the *Compare Versions* button.

7.2.3 Incoming/Outgoing Links

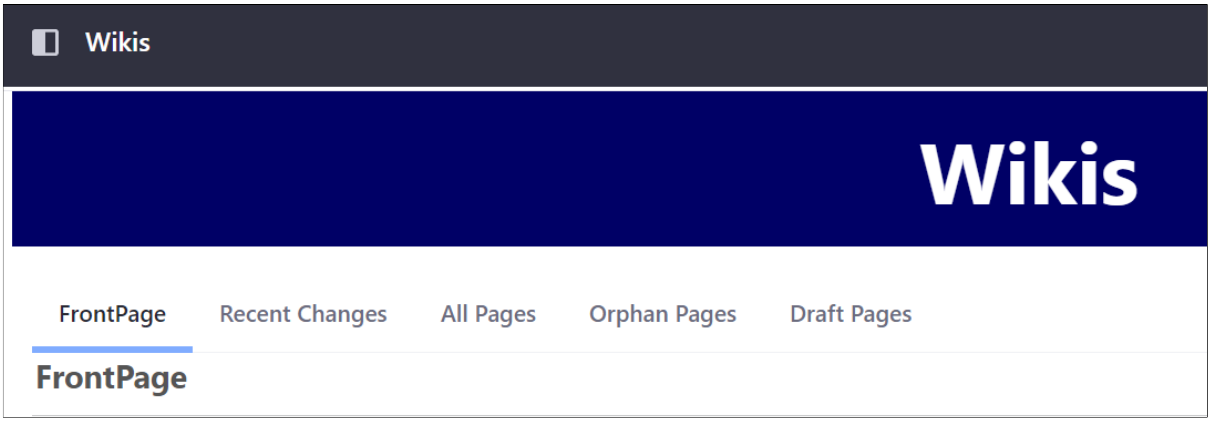
The next two tabs are for incoming and outgoing links. These are wiki links to and from the page. You can use this tab to examine how this page links to other pages and how other pages link back to this page.

7.2.4 Attachments

The last tab is for attachments. You can attach any file to the wiki. This is mostly used to attach images to wiki articles which can then be referenced in the text. Referencing them using the proper WikiCreole syntax renders the image inline, which is a nice way to include illustrations in your wiki documents.

7.3 Navigating in the Wiki Portlet

At the top of the portlet is a list of links which allow you to navigate around the wiki.



Recent Changes: takes you to a page which shows all of the recently updated pages.

All Pages: takes you to a flat, alphabetical list of all pages currently stored in the wiki.

Orphan Pages: takes you to a list of pages that have no links to them. This can happen if you take a link out of a wiki page in an edit without realizing it's the only link to a certain page. This area allows you to review wiki pages that are orphaned in this way so that you can re-link to them or delete them from the wiki if they are no longer relevant.

Draft Pages: takes you to a list of pages which have not yet been published. Users can edit pages and save their changes as drafts. They can come back later to finish their page changes and publish them once they have been approved.

8 MANAGING EVENTS

The calendar widget displays a small monthly calendar showing an overview of upcoming events. A larger area shows the Scheduler, a more detailed calendar with a few options: you can set it to display a *Day*, *Week*, or *Month*, or choose a more event-oriented *Agenda* setting.

The default view is set in configuration, but a user can change it at any time as shown in the Figure below.

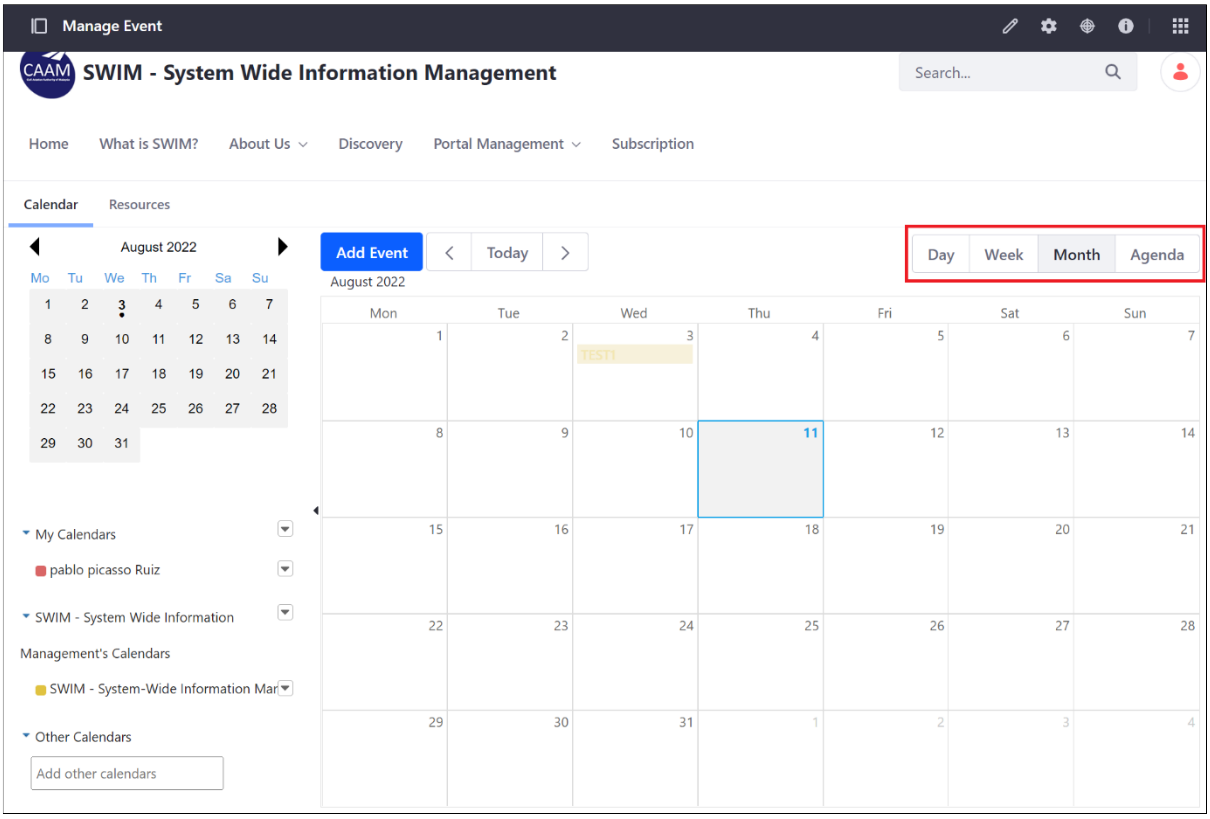


Figure 8.1: The Default View

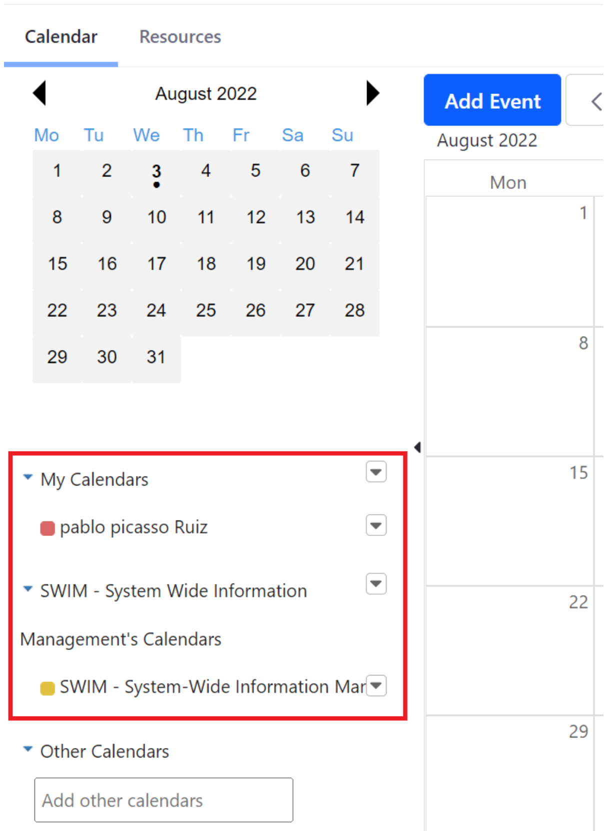
Two calendars are included by default: a personal calendar for the current user and a SWIM calendar. These are displayed in the lower left of the page. Next to each calendar is a colored box: click it to show/hide that calendar's events in the main viewing area.

8.1 Adding New Calendars

To create a new personal calendar:

1. Click on the arrow to the right of the *My Calendars* header and select *Add Calendar* from the menu.
2. Fill in the *Add Calendar* form. Give the calendar a name and description, set a time zone, and decide if it is your user's *default calendar*—the one that is shown automatically whenever the widget is displayed. You can also pick a color, which color codes events whenever multiple calendar's events are displayed at once. You can also decide to enable ratings or comments on the calendar's events, and configure permissions.

   To edit an existing calendar instead of adding a new one, select *Manage Calendars* from the menu. To add or edit a Site calendar, open the menu next to the header with the Site's name.



Personal and Site calendars are shown in the lower left menu in the figure above. This image shows calendars belonging to User *Pablo Picasso Ruiz* and Site *SWIM*

8.2 Adding Events to a Calendar

To add events to a calendar:

I. Click on any day in the main viewing area to open an event creation pop up. If you have selected the *Day* or *Week* view, you can click on the specific time when your event begins.

When you click anywhere on the calendar, you will see the event creation pop up appear. Click Edit to specify details for your event as shown in the figure below.

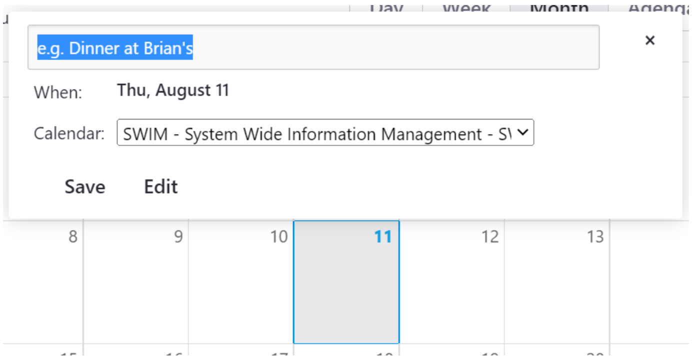


Figure 8.2: Event Creation Pop Up

II. Name your event and assign it to a calendar. Click Save to create the event immediately or Edit to enter additional information.

You can specify event details such as the event title, start date, end date, description, location, and more as shown in the following figure.

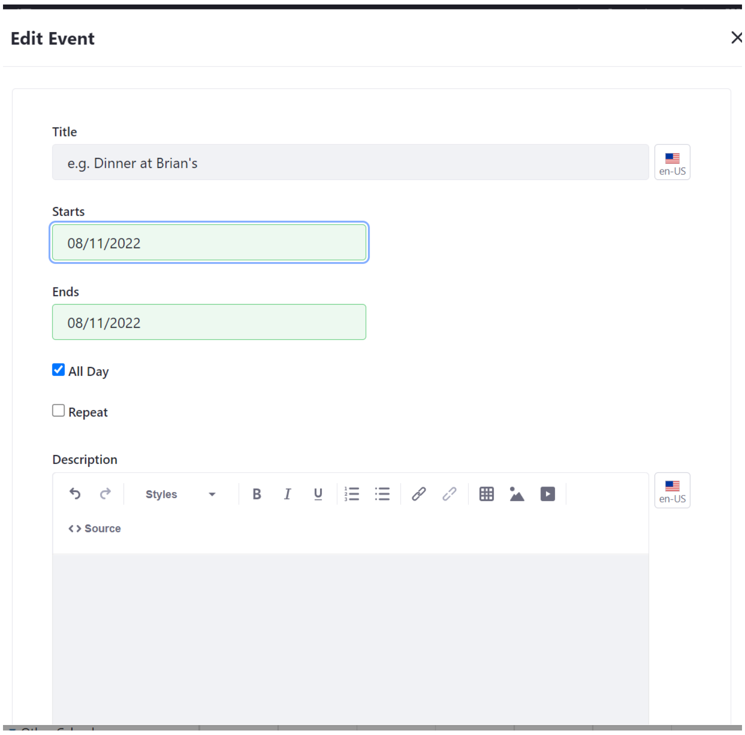


Figure 8.3: Edit Event Window

III. If you clicked *Edit*, complete the *Edit Event* form. Enter start and end times and enter a description. To schedule an event that reoccurs, check the *Repeat* box and fill in the Repeat pop up.

The Repeat box allows you to specify whether an event repeats daily, weekly, monthly, or yearly, how often it repeats, and when (or if) it ends as shown in the below figure.

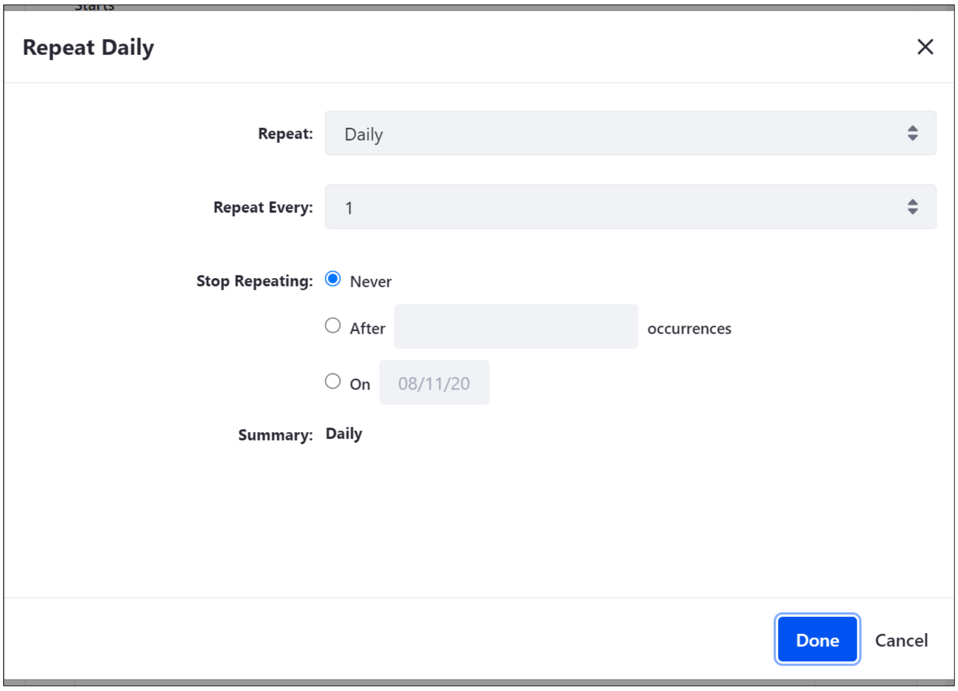


Figure 8.4: Repeat box Option

8.2.1 Additional Event Functions

At the bottom of the *Edit Event* form, there are several collapsed sections: *Details*, *Invitations*, *Reminders*, *Categorization*, and *Related Assets*.

Details

In the Details section, you can move the event to another calendar and enter a location.

Invitations

In the invitations section, invite Users, Sites, or Calendar Resources (see the next tutorial for more on resources: in brief, a resource is anything you might need for an event—a conference room, a vehicle, etc.). Follow these steps:

I. Enter the name of an invitee (User, Site, or Resource) in the Invitations field. Hit Enter to add them to the Pending column.

II. Check the availability of invitees by clicking the arrow next to their names and selecting Check Availability. This displays their calendars (assuming you have permission to view them).

An automated email is sent to invitees who must navigate to the calendar widget to respond. See below to customize the content of the invitation. When invitees respond to the invitation, their names move to the Accepted, Declined, or Maybe columns.

Reminders

Schedule up to two email reminders to send to attendees. Reminders translate the time of the event into the recipients own time zone. See the next subsection to customize the content of the reminder email.

Categorization

Tag your event or assign it to a category so it appears in appropriate search results and is published by any asset publisher set to publish content assigned to the same category.

Related Assets

List an asset—such as an agenda or supplementary material for a meeting—as related to your event. Links to related assets are displayed in the *Event Details* window.

8.3 Customizing Email Notifications

To customize email notifications for event invitations and reminders:

I. From the Calendar widget, click on the arrow next to a calendar and select *Calendar Settings*.

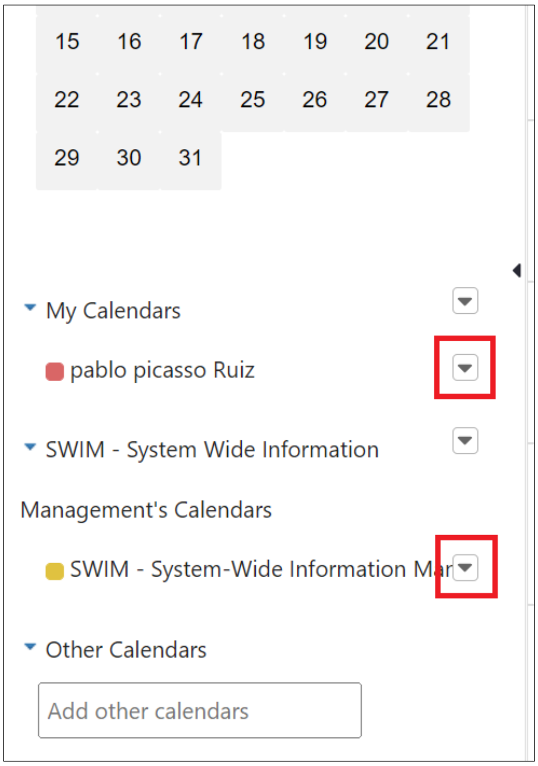


Figure 8.5 Email Templates Apply to A Single Calendar and All Events

II. Click on the *Notification Templates* tab. Then select either the *Invite Email* or the *Reminder Email* sub-tab.

III. Edit the email as desired. At the bottom of the screen is a glossary that specifies variables for terms that were set when you created the event. Use these variables to refer to event-specific information, such as the event's name, date or location. It is a good idea to include a link to the event (use the variable `[$EVENT_URL$]`) as users must navigate to the calendar widget in order to respond.

IV. Click *Save*. Now your notifications contain the proper text.

9 MANAGING NEWS

The *Manage News* menu allows users to create and manage any news to be shared with other users and guests in the *News* section.

9.1 Adding News

To add new news to the *News* section:

I. Fill in the *Adding News* form. Enter the News Title, Content, and the News Date.

You must specify the News Title, Content, and the News Date to add the news to the News section as shown below.

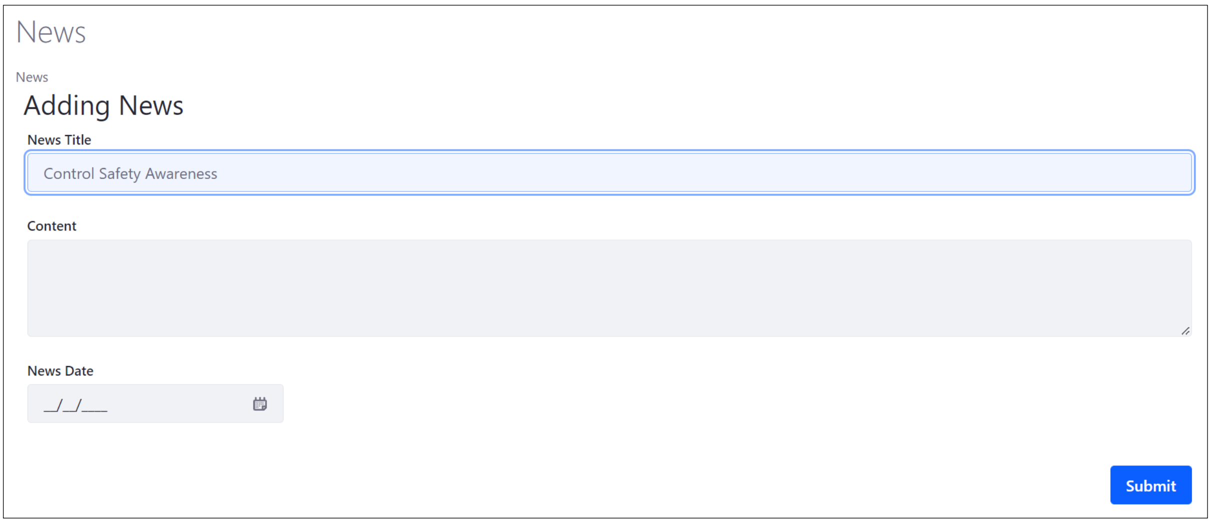


Figure 9.1: Adding News

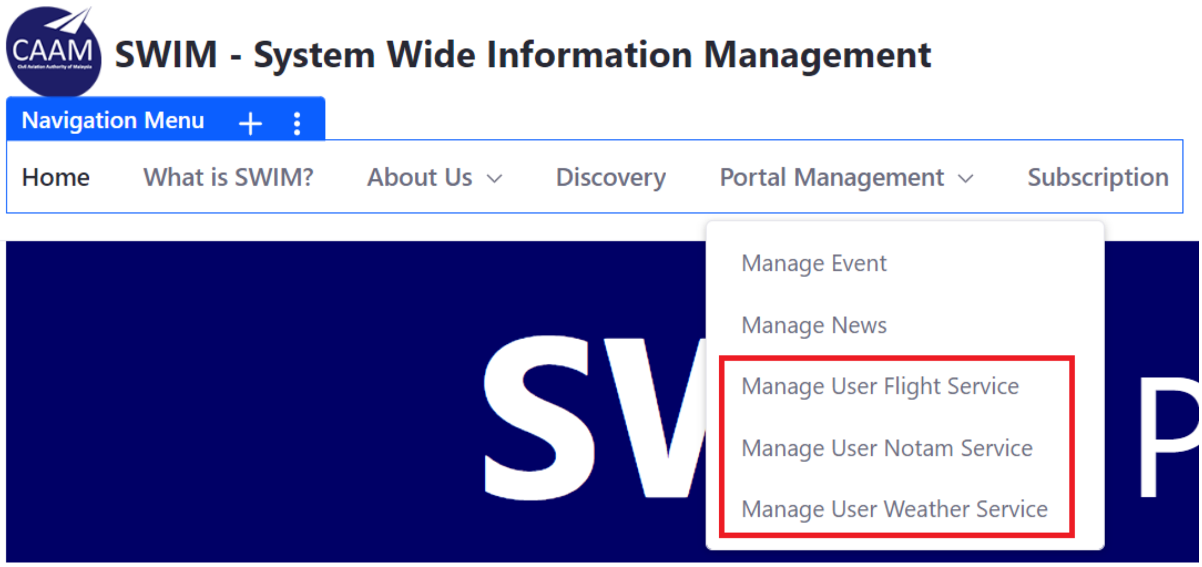
II. Click *Submit*. You will see a success message saying

Thank you.

Your information was successfully received. Thank you for filling out the form.

10 MANAGING SUBSCRIBERS

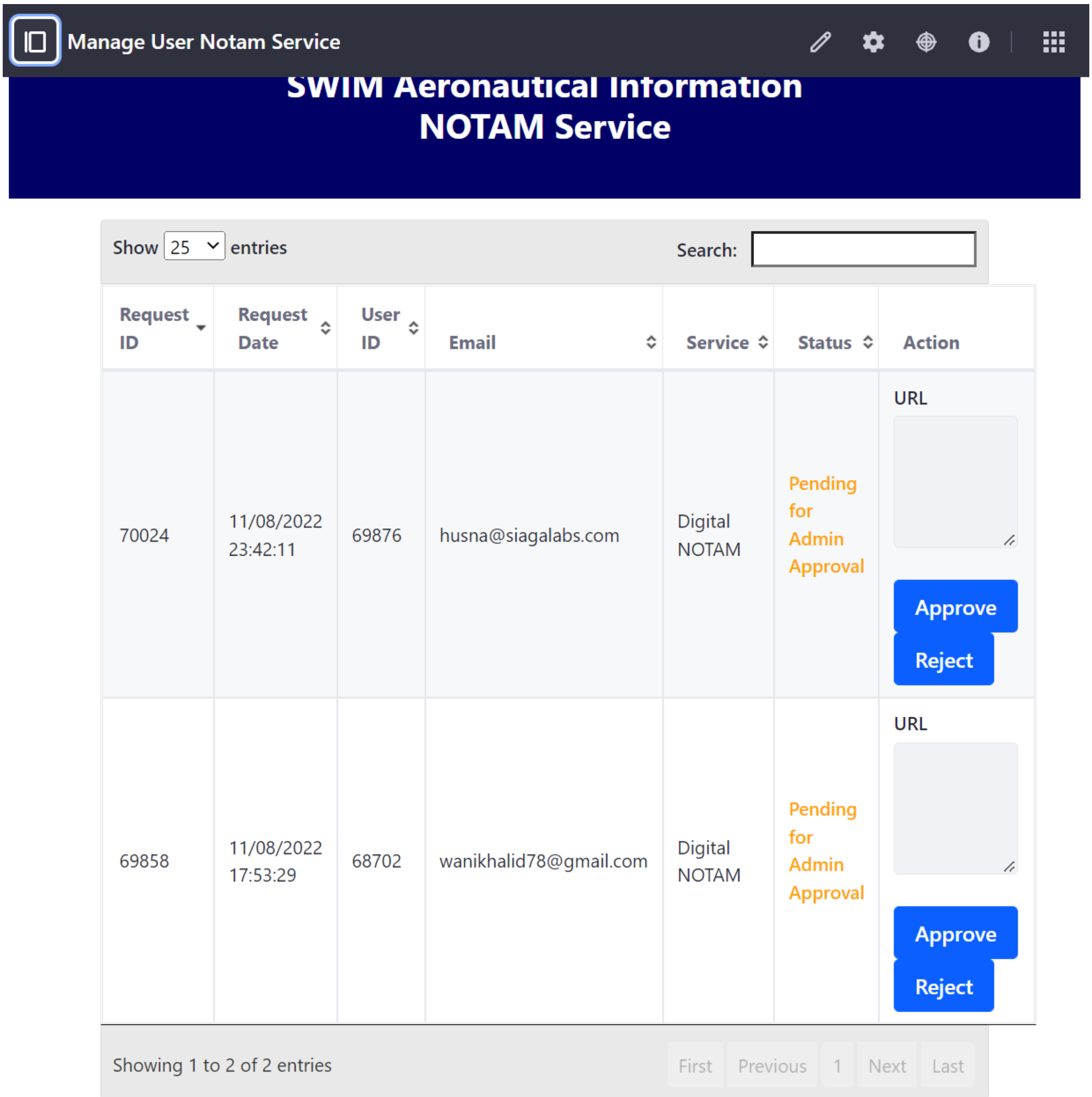
Under *Portal Management*, there are three different services for which you can manage their subscribers: *Flight Service*, *NOTAM Service*, and *Weather Service*. The processes involve in managing the subscribers for all three services are the same.



10.1 Approving or Rejecting Subscribers

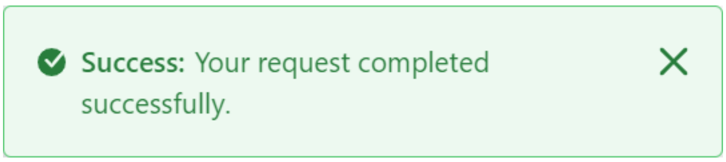
To approve or reject new subscribers:

I. Select which service that you wish to manage the user's subscription.
II. The list of user's subscriptions will be displayed.



III. To approve the user's subscription, specify the URL that will be included in the email that the user will receive. The URL provided will be used to navigate the user with the instructions on how to access the data provided by the subscribed services.

IV. Click Approve to approve the user's subscription, or you can click Reject to reject the user's subscription from the selected services. You will see a success message saying



11 CREATING PAGES

A site is a set of pages where content or applications are published. You can create new pages and maintain them. You can do everything you need with pages from **Site Administration**.

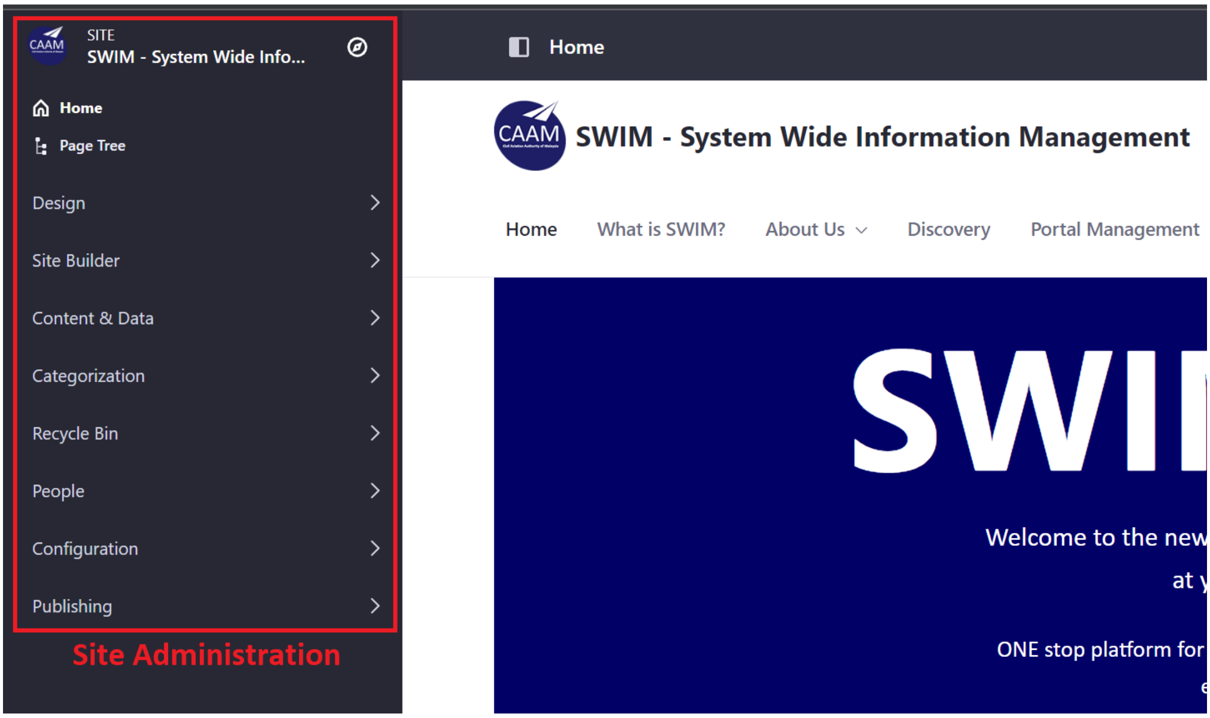


Figure 11.1: The location of Site Administration Panel in the Portal

I. If you are not currently on the Site you want to edit, click the *Site Selector* button ( ) next to your current Site name in the Menu and select your desired Site.

II. Go to *Site Administration* → *Site Builder*.

III. Click on *Pages*

The Pages screen lets you edit your Site pages as a whole as shown in the Figure below.

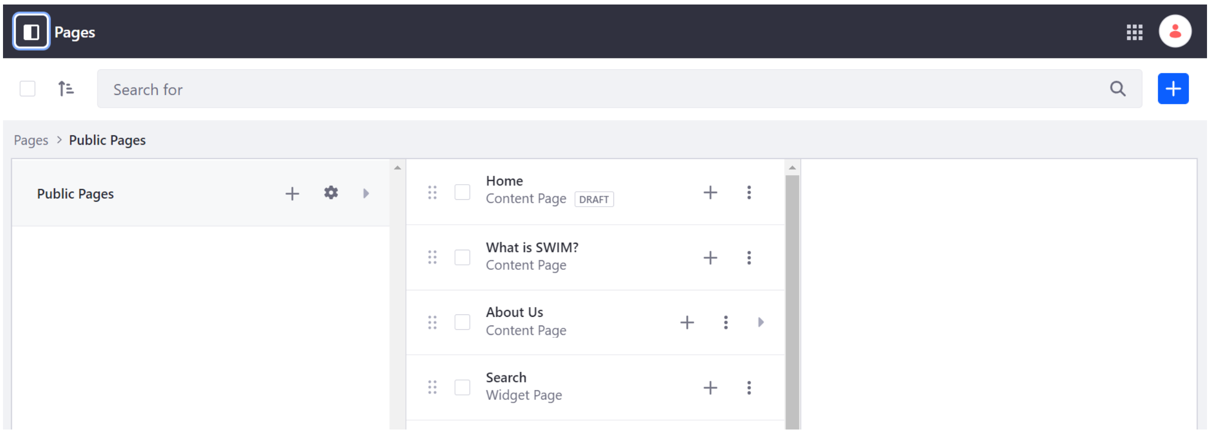


Figure 11.2: The Pages Screen

From here, you will create pages and page templates. Pages are always part of page sets, and page sets are always associated with Sites. Even users' personal pages are part of their personal Sites. All pages belong to one of two types of page sets: **public pages** and **private pages**. By default, anyone can access public pages, even non-logged in users (guests). Only users who are members of the Site that owns the pages can access private pages. This means the private pages of an organization's Site are viewable only by Site members and members of the organization.

From *Pages* you can do several things:

I. Click the (+) button in the top right corner to add a new page.
II. Click options, icons, manage page, or page set settings.
III. Create child pages by clicking the (+) button next to an existing page.

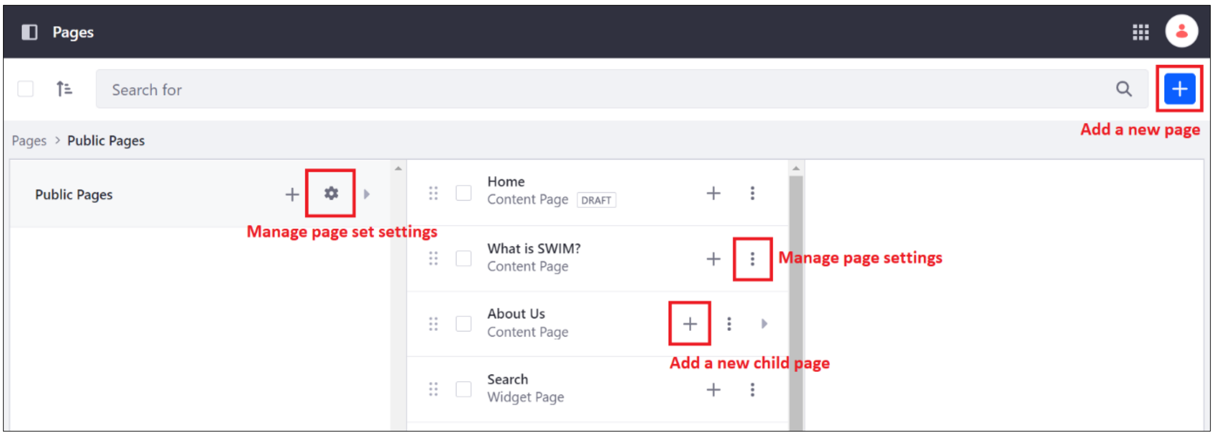


Figure 11.3: Understanding the Options on Site Pages

Note: Adding a child page creates child pages in the hierarchy below the page you have selected. You can nest pages as deep as you like. You are not forced to define the page hierarchy in a page's friendly URL. Therefore, child page friendly URLs are not required to include their parent page. For example, a parent page named Parent and its child page named Child could have the URLs *SITE_URL/parent* and *SITE_URL/child*, respectively. The default friendly URL given to a page is based only on the page name and not the hierarchy. If you wish to modify a generated friendly URL, you can do so by following the Friendly URL configuration section.

Once you have clicked the ( ) icon to add a page, select *Public Page*. There are eight options of page types:

I. **Blank**: Creates a Content Page with inline editing based on Fragments.
II. **Full Page Application**: Creates a page that displays a single full page application.
III. **Link to a Page of this Site**: Links to a page within the same Site. This is often used to make a page available in multiple parts of a Sites hierarchy.
IV. **Link to URL**: Creates a link to any URL. This could be an external page or a link across the SWIM Portal.
V. **Page Set**: Creates a container for subpages that is not actually a page itself.
VI. **Widget**: Creates a page with a layout template that defines a number of rows and columns for adding widgets to your page.
VII. **Panel**: A page containing any number of applications as selected by an administrator, but only one is displayed at a time. Users select the portlet they want to use from a menu on the left side of the page, and the selected portlet takes up the entire page.
VIII. **Embedded**: Displays content from another website inside your instance. An administrator can set a URL from the page management interface and that page appears in the context and within the navigation of your Liferay instance. To embed an external website, you must provide the protocol in the URL (e.g. `https://www.liferay.com/`).

a) To the left, under Collections, you can choose to view the basic page templates or a collection of page templates. By default, only *Global Templates* appears, but additional collections you create appear here as well.
b) You must select a page type when adding pages as shown below.

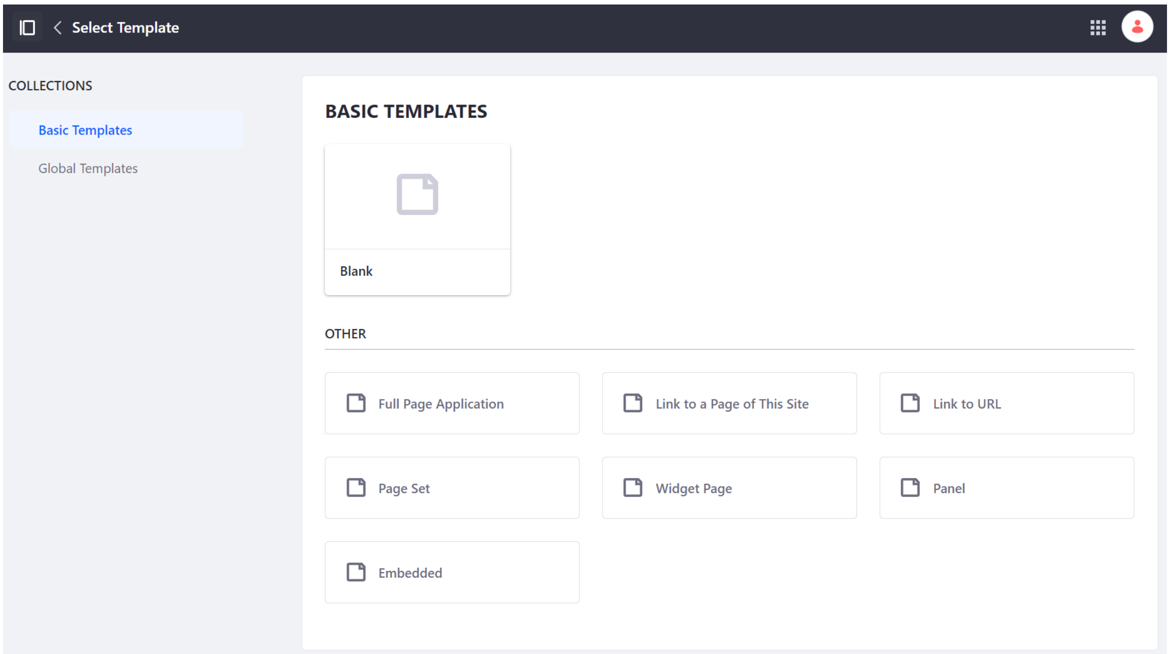


Figure 11.4: Selecting Page Type

c) Type the name of the new page and click Add as in Figure11.5

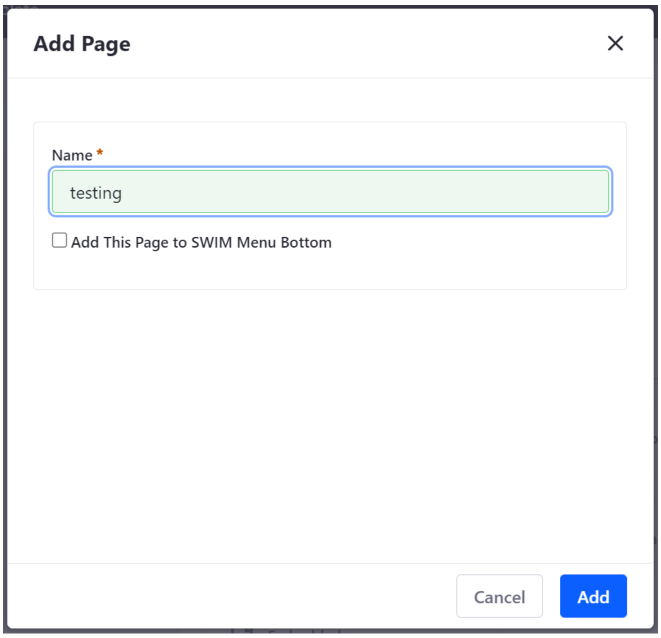


Figure 11.5: Add Page – Add Name

If you must ever reconfigure the page you have created for your Site, select *Configure* from the Options menu for the *Manage Page Settings* from *Pages*. When configuring a specific page, you have more options than when you were creating a new page. Select the Configure option from the Manage Page Settings as in Figure 11.6 and set the configuration for your pages in Figure 11.7.

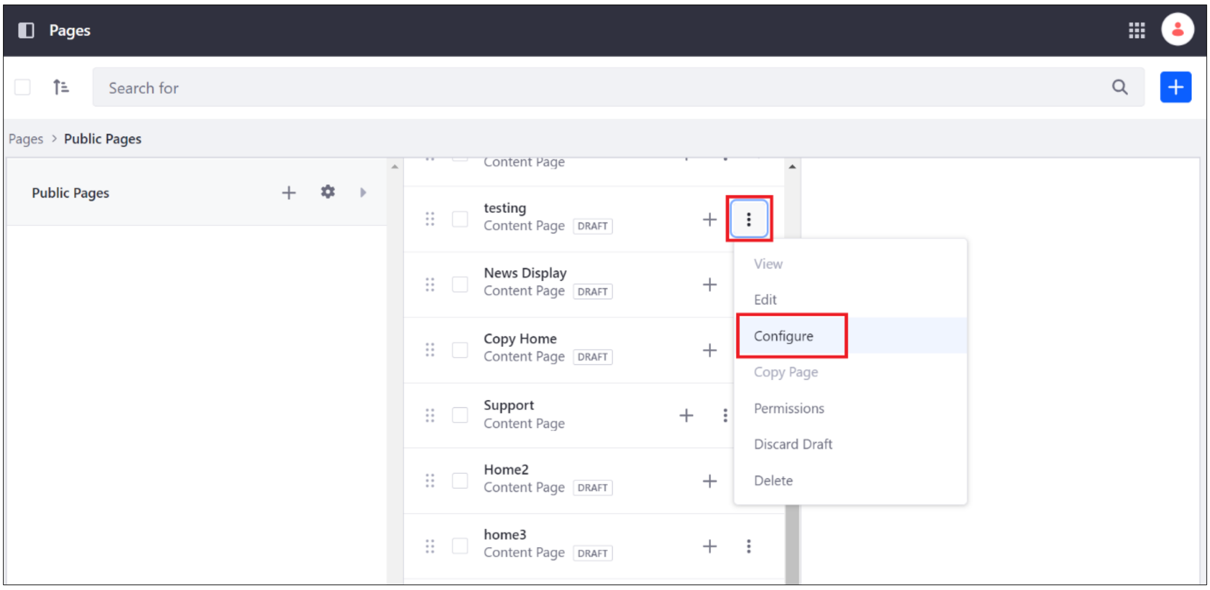


Figure 11.6: Configure Option - Manage Page Settings

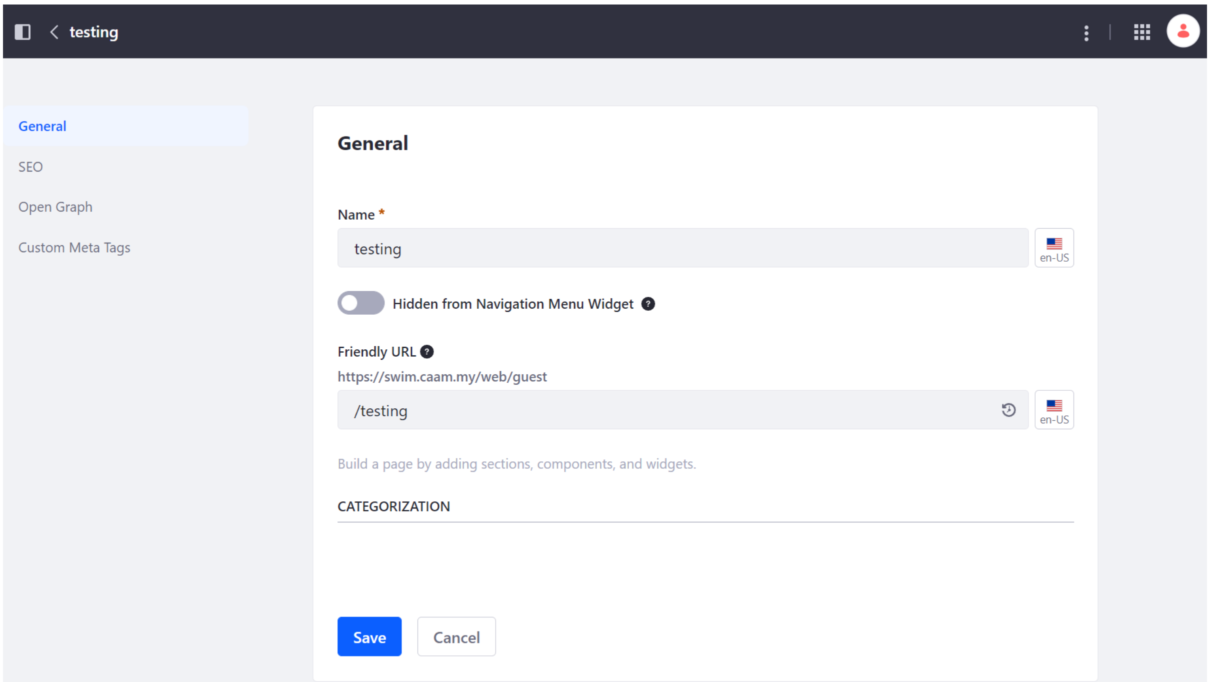


Figure 11.7: Page Configuration Settings

12 CREATING CONTENT PAGES

Content Pages provide a new paradigm for creating pages in the Portal. They empower content creators to build pages that can be easily managed and have their content edited in-line and on the fly.

Content Pages are built by dragging and dropping elements onto the page and then configuring the way those elements appear. There are three kinds of elements:

I. **Sections** are fragments that define a space to place other elements. A section fills the entire width of the page. Sections can be thought of as complete Fragments that serve a purpose by themselves. A large banner image with a text overlay is an example of something you might build as a section.

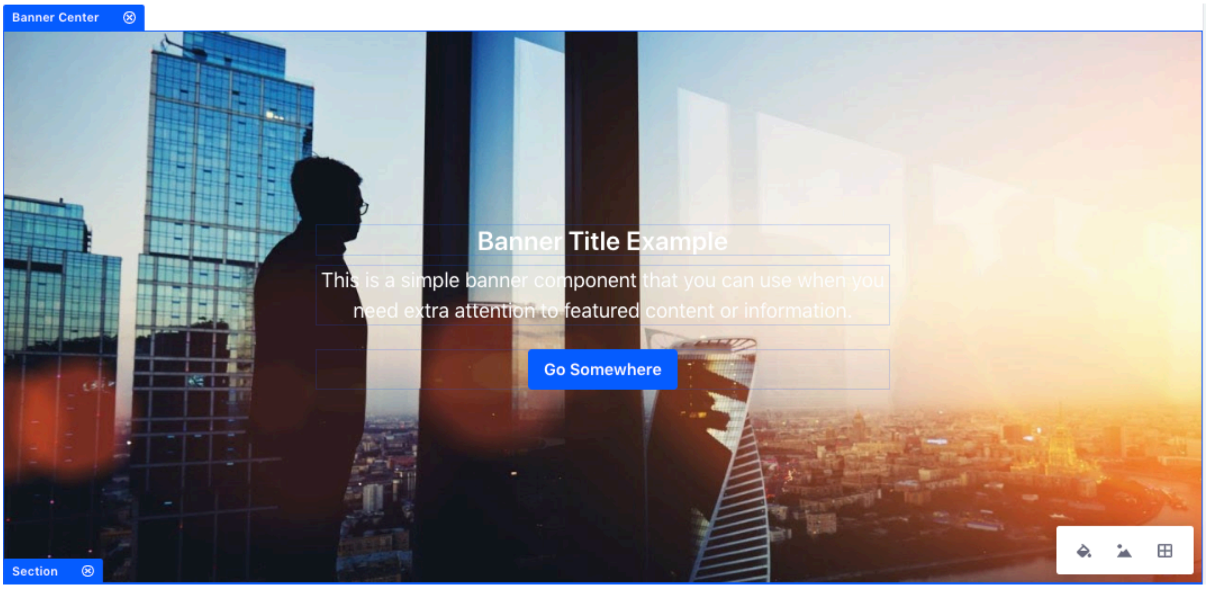


Figure 12.1: A Section Names "Banner" Displayed While Editing a Content Page

II. **Layouts** are special Sections that define spaces where you can add fragments or widgets. Each layout you add fills the width of the page. You can add any number of layouts to the page.

For example, in the figure below, a 3 Columns and 1 Column Layout Stacked on top of each other.

Figure 12.2: Layout Sample

III. **Components** are small design elements or pieces that add functionality to the page. A component might be an image with formatting or a block of text with styling pre-applied. Components must be added to the page inside a Layout. If you add a component outside an existing Layout, a one column layout is automatically added to contain the Component. While Sections should be complete by themselves, Components work together to build pages piece by piece.

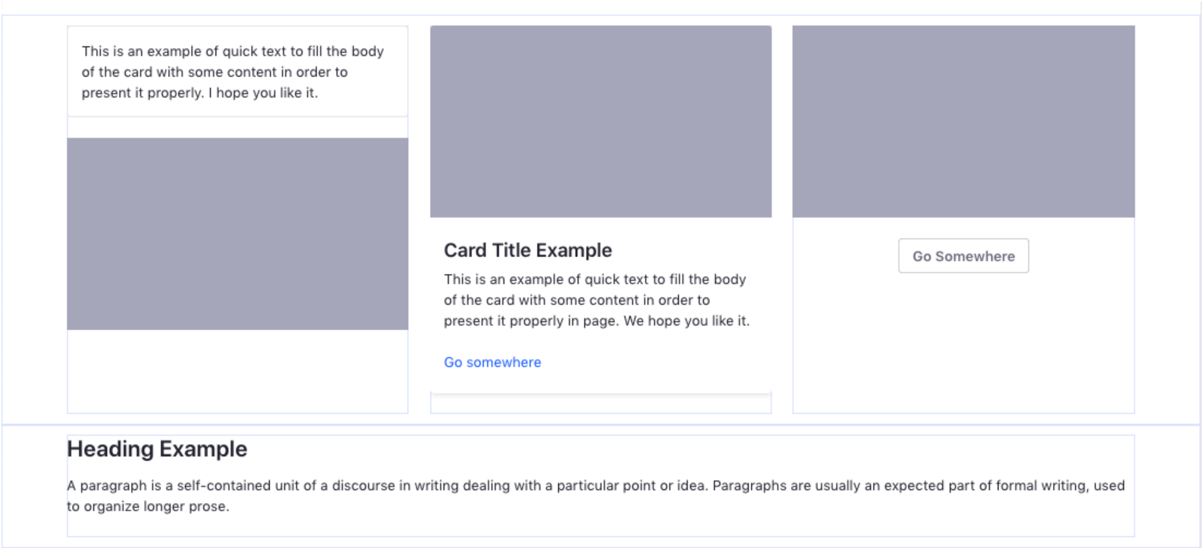


Figure 12.3: Examples of Out of the Box Components Arranged

12.1 Editable Elements

Fragments can have editable elements. After a Fragment has been added to a page, you can click on an editable area to provide your own text, image, or links in place of the default defined in the Fragment.

You can also map these elements to content. You can set the Content for the element (web content article, document, or blog) and choose its applicable *Field* to display (e.g., title, author name, tags, etc.).

12.1.1 Editable Text

Editable text can be plain or rich text. Plain text has no special styling. Rich text enables text styles, typographical emphasis, alignment, and list formatting.

The rich text editor provides a simple WYSIWYG interface with a few formatting options as shown in the following figure.

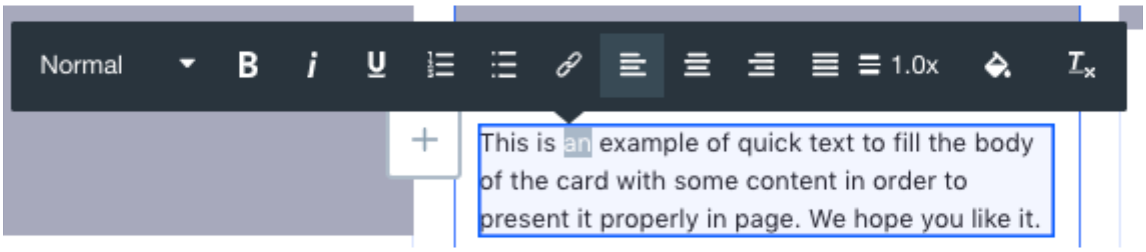


Figure 12.4: The Rich Text Editor - Simple WYSIWYG Interface

12.1.2 Editable Images

Editable image elements allow replacing the image URL or an image from your Documents and Media library. You can provide a link target for the image. To edit an image from the Content Page editor:

I. Click on the image you want to replace.
II. The *Browser* panel will be displayed.
III. Under *Image Source* tab, you can click *Change Image* to upload an image from Documents and Media or define an image URL.
IV. Click *Clear Selection* to reset the image.
V. You can also specify an image description.

Editing an image allows you to enter a URL, select an image from Documents and Media, or set a link for the image as shown in Figure 12.5.

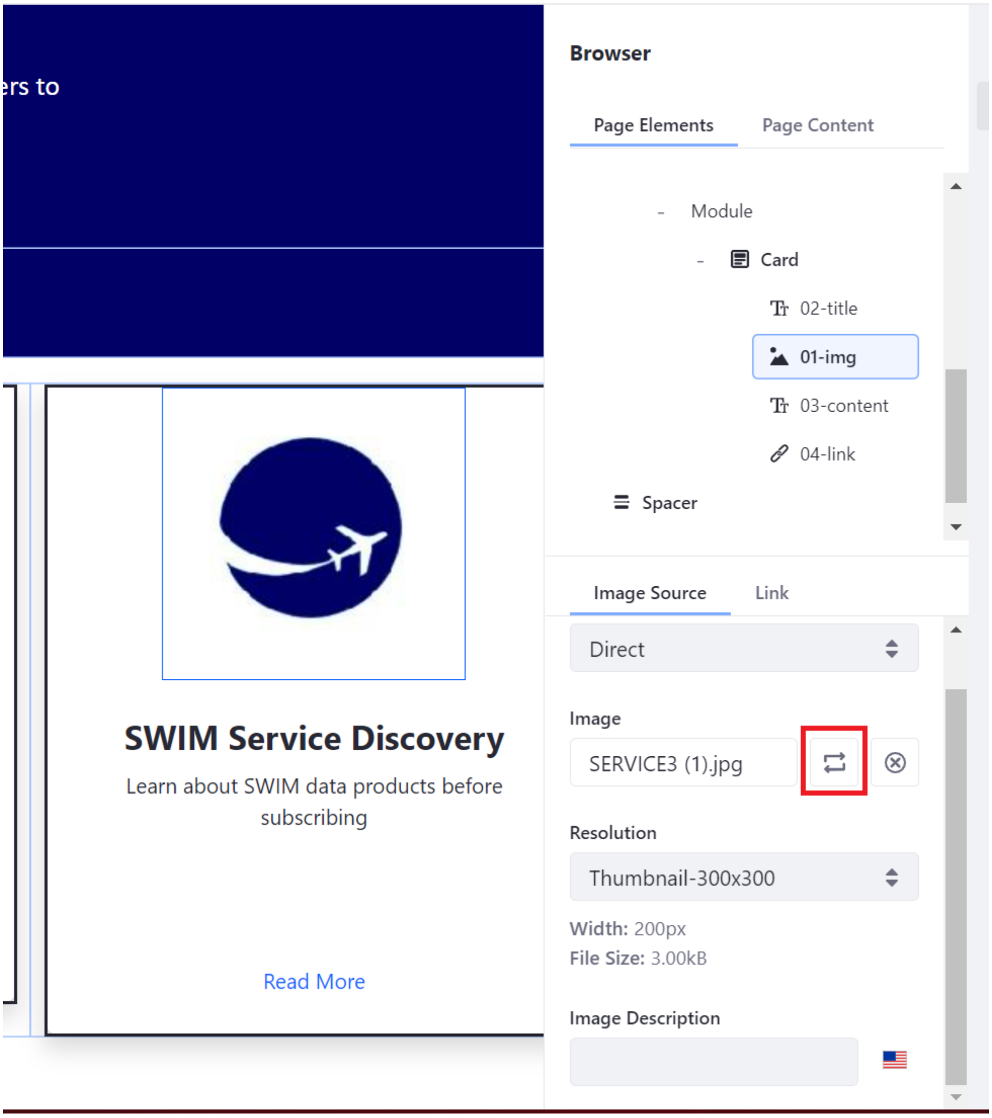


Figure 12.5: Editing Image Page

12.1.3 Editable Links

Editable links can be associated with entities that redirect you to a content type or Page (e.g., buttons). To edit a link from the content page editor:

I. Click on the link or button that you want to edit.
II. The *Browser* panel will be displayed.
III. Under *Link* tab, you can click select to link either by URL, Page, or Mapped URL.

Editing a link allows you to enter a URL or select any existing pages in your portal as in Figure 12.6.

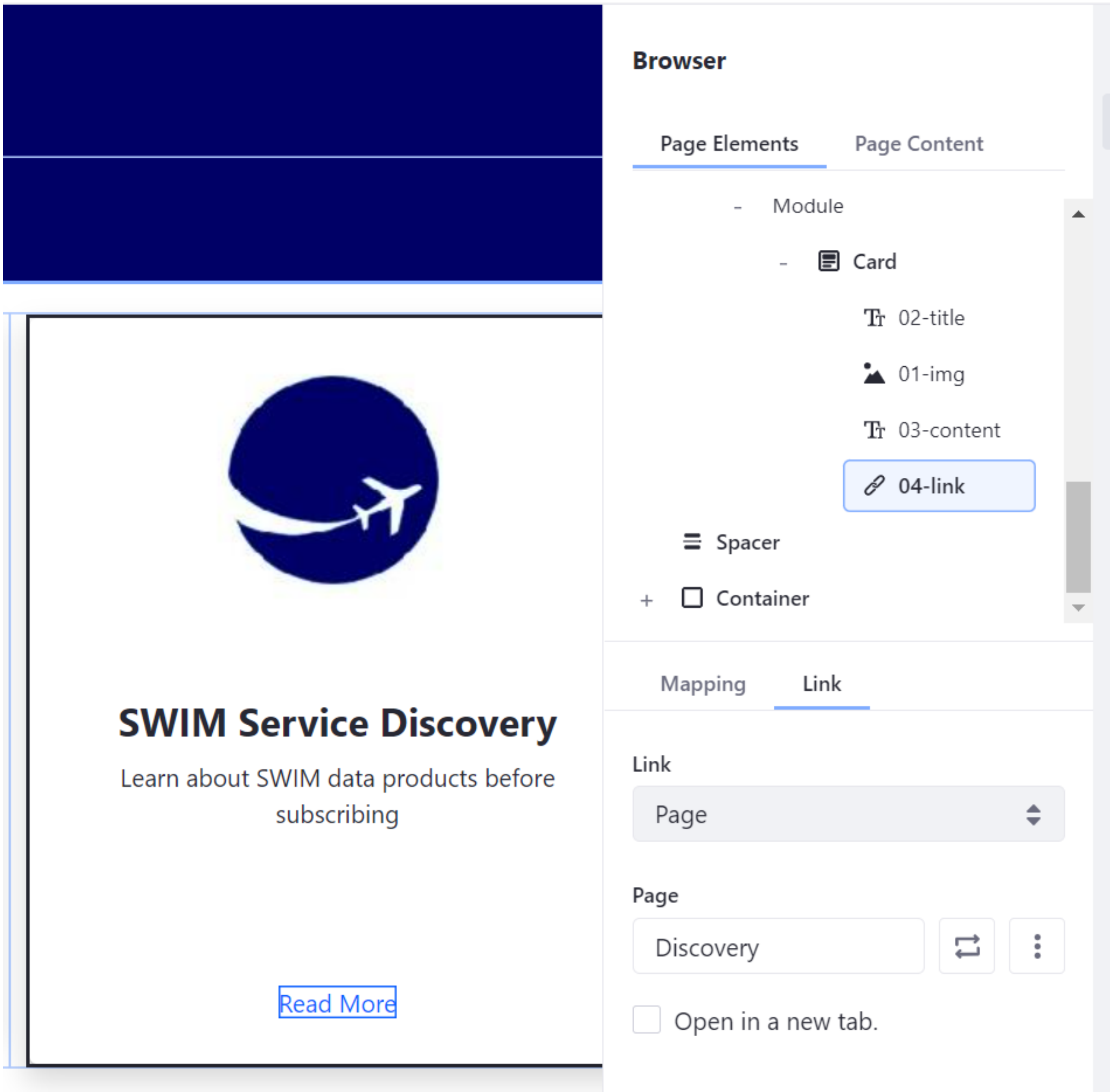


Figure 12.6: Editing Link